

LMS tenant administrator guide

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This guide will occasionally be updated. It is advisable not to download a copy, and instead access it from the LMS each time you refer to it, to ensure you are looking at the latest version.

This is a comprehensive guide to actions specific to tenant administrators when using the LMS. It contains **additional** information to the guide for all users, which can be accessed by clicking "Get Help" in the header bar on the LMS.

You can click on a page name in the table of contents below to navigate directly to that page.

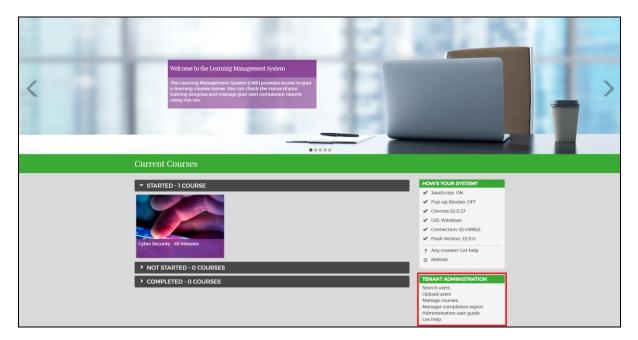
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The "Tenant administration" block

The "Tenant administration" block contains links to all the actions you can take as a tenant administrator (over and above a regular user) on the LMS.



TENANT ADMINISTRATION

- 1 Search users
- 2 Upload users
- 3 Manage courses
- 4 Manager completion report
- 5 Administration user guide
- 6 Get help

You can find it on the right-hand side of the homepage, underneath the "How's your system?" block.

All of the information in this tenant administrator guide relates to the pages reached by clicking the links in the "Tenant administration" block.

The numbers on the diagram above correspond with the numbers on each section.

Note that clicking "Administration user guide" opens this guide.



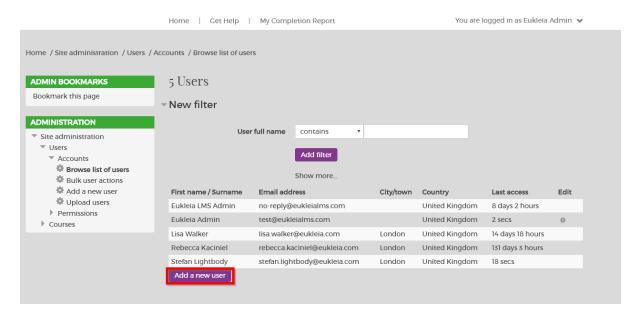
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Search Users

You can manage your users on the "Search users" page.

Adding a new user

On this page, you can add new users one at a time. If you wish to upload new users in bulk, go to $\underline{2}$. Bulk user upload below.



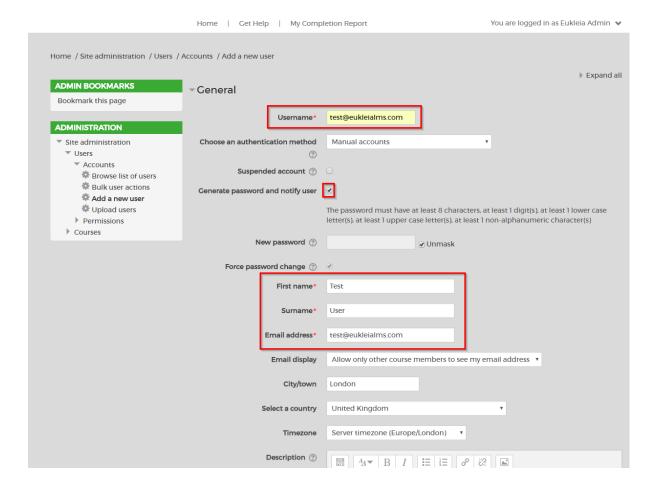
If you wish to add a new user, click "Search users" (located in the Tenant admin block) and then click the "Add a new user" button. This will take you to a page where you can fill in all the relevant details for the user. Follow the steps below:

1	Fill in all fields marked with a *
2	The username should always be the same as the email address. They should both be
	entered in lowercase text.
3	The "Generate password and notify user" box will provide the user with a temporary password that they are required to change when they first log into the LMS.
	Please note, this temporary password will expire after 30 minutes of the email being sent.



- 4 It is advisable to fill in the following fields as these appear on the reporting:
 - "Select a country"
 - "Department" (Note that "Department" can be found in the "Optional" section at the bottom of the page; click on "Optional" to expand the section)
- 5 Click the "Create user" button at the bottom of the page when you are done.

Please see screenshot below for an example of the user compulsory fields when creating a new user account:



Searching for a user

You can search through all of the users on the LMS, filtering them as required.

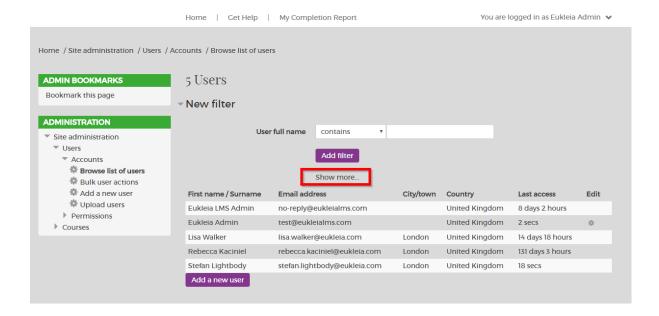
Every time you conduct a search, the counter at the top of the page will tell you how many users are shown following your search. When you load the page for the first time, the total number of users is shown.

The section allowing you to filter by the user's name is the only one that appears by default when you open the page.



If you wish to conduct a more detailed search, click "Show more...", which appears beneath the "Add filter" button. This reveals various other filters that can be applied to your search. To hide these additional filters, click "Show less...", which appears underneath all the additional filters.

Please see screenshot below of how to access the 'Show More' function:



Your results appear in a table. You can reverse the order in which data is shown for each column by clicking the column title.

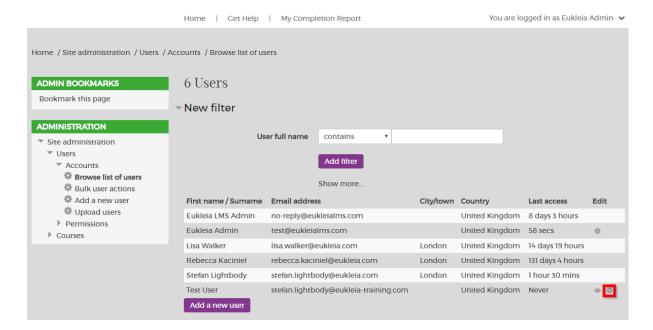
Once you have searched for users, you will be shown the "Active filters" which have given you your current results. To return to the full list of users, click "Remove all filters". Alternatively, you can remove certain filters by selecting the tick box next to the filter and clicking "Remove selected".



Editing a user's account

If you wish to edit a user, click the ** icon in the "Edit" column on the right-hand side of the table.

Please see screenshot below of how to access the 'Edit' button:



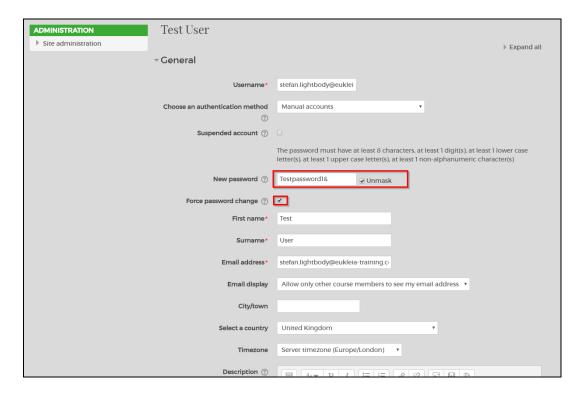
Resetting a user's password

If you are resetting a user's password, follow the steps below:

1	Click the button to edit the user's account.
2	In the "New password" text box, type the temporary password you are applying to the
	user's account. If you wish to see what you have typed in, click the "Unmask" box to the
	right of the text box.
	You should take note of the user's email address and temporary password – you will need
	' ''
	to email the password to the user.
3	Tick the box next to "Force password change". When the user next logs into the system,
	they will be required to:
	Use the new password you entered to log in
	After logging in, change that password to a new one
4	Click the "Update profile" button at the bottom of the page.
5	Email the user to inform them that you have changed their password. Ensure you give them
	their temporary password.



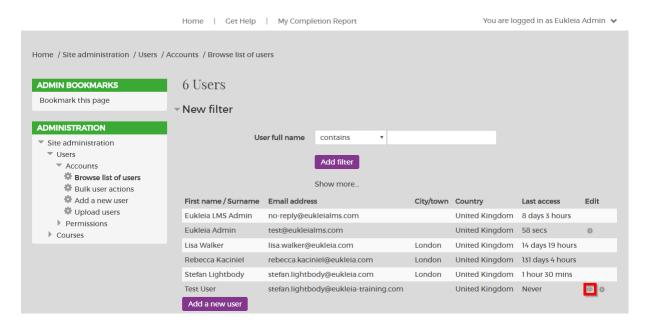
Please see screenshot below for an example of how to reset user password:



Suspending a user's account

If you wish to suspend a user, click the icon in the "Edit" column on the right-hand side of the table. This means that the user has been archived and they will no longer be able to log into the LMS.

Please see screenshot below for an example of how 'Suspend' a user's account:



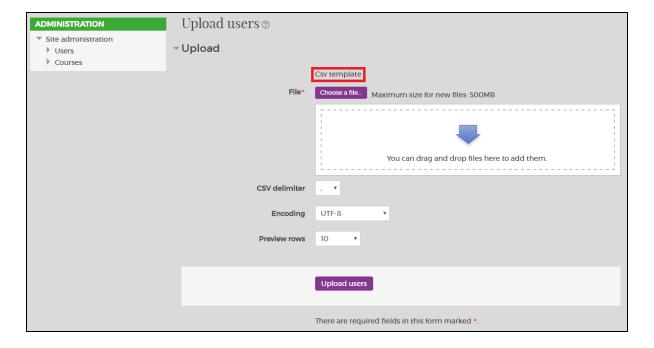




Bulk user upload

On the "Upload users" page, you can download a spreadsheet template which you can use to add users to the LMS.

To access the template, click "Csv template". This will download a copy of the spreadsheet template, which can be opened in programs such as Microsoft Excel and Google Sheets.





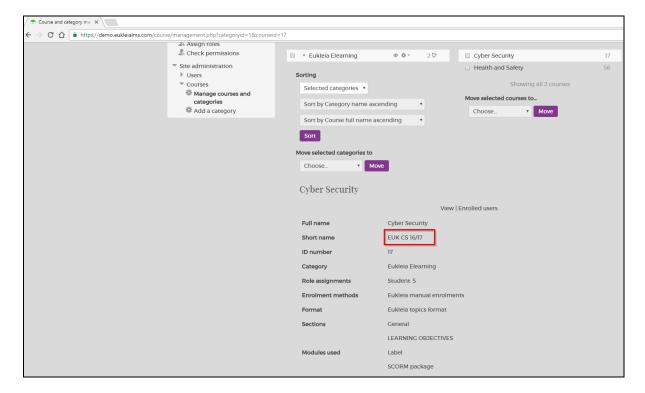
To bulk upload users to the LMS and bulk assign users to courses please follow these steps:

- 1. Download the Csv template.
- 2. Fill out the Csv template with the following information:



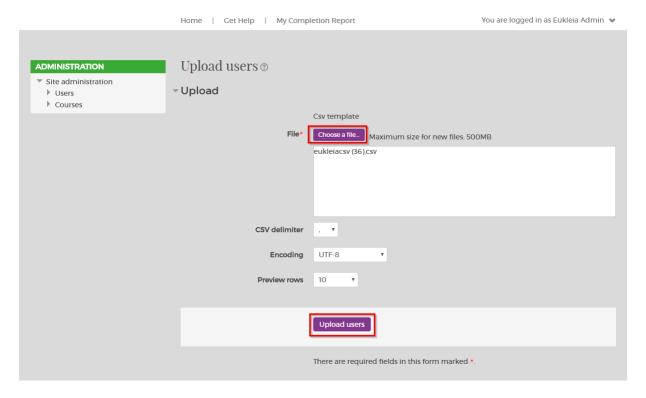
- Username has to be users e-mail address and entered in lowercase. Please note, no apostrophe can be entered in the username.
- Password To upload a user to the LMS without a password enter an invalid password i.e.
 password123. This will then upload the user account to the LMS and they will not get any
 notification when they are initially uploaded to the LMS. Please note, if the password field is
 left blank and the user is a new user, a 'New account' e-mail will be sent to the user with a
 temporary password link to access the LMS.
- First name User's first name.
- Last name User's last name.
- E-mail Address User's e-mail address apostrophes can be entered in this field if the user has this in their e-mail address.
- Course1 This is the course 'Short name' and is the course code of the course you want to
 assign the user to. If you wish to add a user to more than one course you can add another
 field, i.e. 'course2' and so on.

Please see below an example of where to find the course 'Short name' which is located on the course details page.





- 1. Once the CSV template is completed and saved you can now process with the bulk upload to the LMS.
- 2. Click 'Choose file' to locate the CSV file in your drive.
- 3. Select file and Click 'Upload users'.

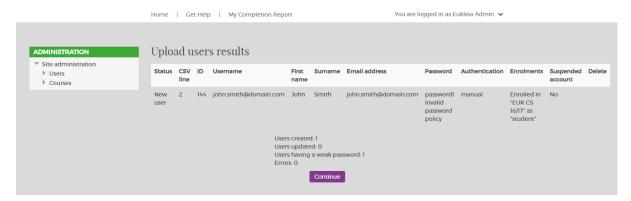


- 4. Once the CSV file has been uploaded and accepted you will be directed to an 'Upload users preview' page.
- 5. You will then have to change the settings above to be identical to the settings highlighted in the screenshot below. Please note do not change any of the Default values in the bottom category.





6. Check the 'Upload users results' page as this will confirm if the bulk upload and bulk course assignment was successful and if there were any errors. Please note if there are any errors send a screenshot of this to the Support Team at support@eukleia.com



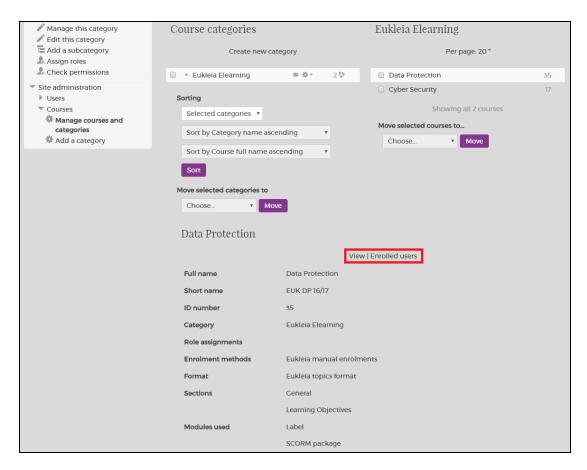




Manage your courses

If you click "Manage courses" within the Tenant admin block, you are taken to a page showing a list of all of your courses.

- 1. Click on the course title
- 2. Scroll down on page
- 3. You can then click "View" or "Enrolled users" to see more information about the course



Viewing users enrolled on a course

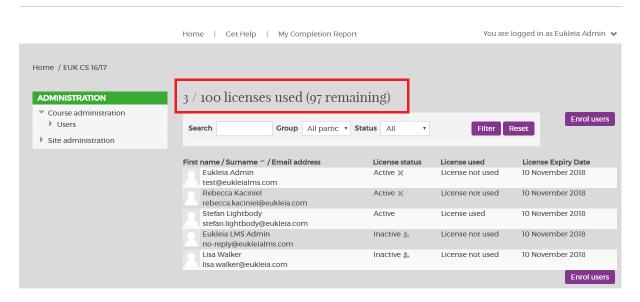
If you click on a course title and then click "Enrolled users", you will see the following information:

• Your total number of licences, and how many remain



- A list of all users on this course
- Whether each user's licence for this course is active
- Whether each user's licence for this course has been used
- When each user's licence for this course will expire

Please see below screenshot of licence information and the enrolled users:

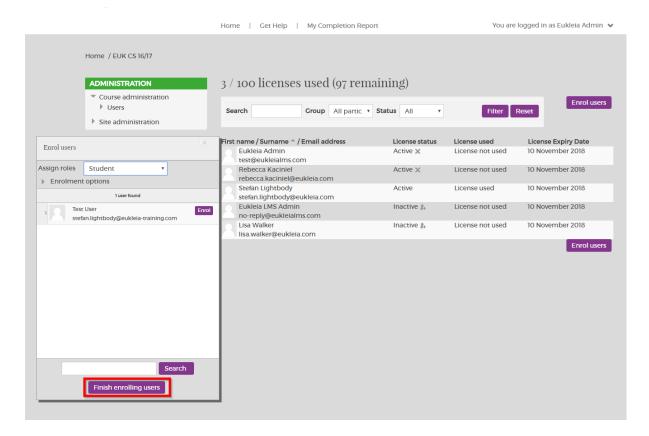


You can also filter your results using the filters at the top of the page.

Enrolling a user onto a course

1	Click the "Enrol users" button. A box will appear showing a list of users you can enrol on the
	course.
2	Use the search box at the bottom of the page to find the users you would like to enrol.
3	When you locate the user you would like to enrol, click the "Enrol" button next to their
	name.
4	When you have located all the users you would like to enrol, click the "Finish enrolling
	users" button.

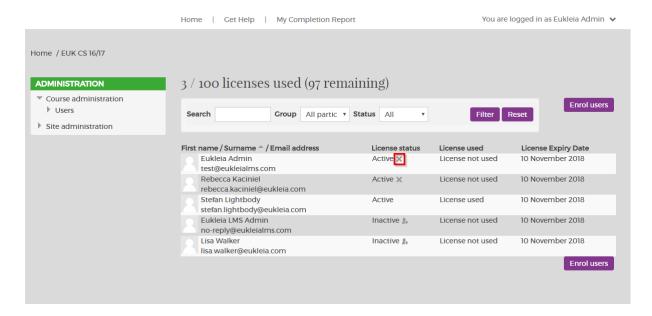




Suspending a user from a course

	9
1	Locate the user who you would like to suspend from this course.
2	In the "License status" column, click the X icon to the right of "Active".
3	Click "Continue".
4	This change will be reflected in the text at the top of the page stating the total number of
	licences remaining; this will increase by one.
	Please note, you can only free up a license for a course which has not previously been
	used. If a learner has already accessed the course, even if they have not completed it, the
	license will remain attached to that learner and cannot be altered.





Creating emails to be sent to users enrolled on a course

You can send the following emails to users:

Course enrolment email

This email tells users that they have been enrolled on a course.

Course reminder email

This email reminds users that they have to complete a course, if they have not already done so. It is only sent to users whose completion status for the course is either "Registered" (meaning they have not started the course) or "Incomplete" (they have started but not completed the course).

Incomplete course email

This email tells users that they have not completed a course by the deadline. It is only sent to users whose completion status for the course is either "Registered" or "Incomplete".

Note: If you want to use the course email function, you will need to set up the course emails before you enrol the users to the course. Emails should take no longer than 15 minutes to be sent to the user.

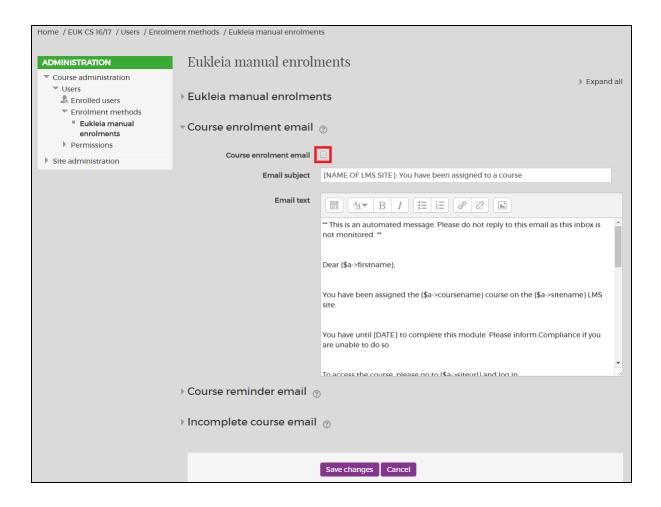
To locate the emails, follow the steps below:

1	Click "Manage courses" which is located within the 'Tenant Administration block'.
2	Click on a course title.
2	Click "Enrolled users".
3	In the "ADMINISTRATION" block on the left of the screen, open the 'Course administration'
	drop-down menu and click "Users".
4	Click "Enrolment methods".
5	Click "Eukleia manual enrolments".



You should set up all three emails for each course at the same time. This should be a quick process as template text is in place for each email. Edit the email templates by following the steps below:

1	Click "Course enrolment email", "Incomplete course email" or "Course reminder email".
	This will expand the section.
2	Within the email, edit:
	The date by which users have to complete the module
	The name and email address at the end of the email
3	You can edit the emails and their subject lines further if you wish, but we advise that the
	emails remain close to the template.
	You must not edit the tags. These appear in each email, and look like this, for example:
	{\$a->firstname}. They are used to automatically pull data from the LMS.
	Variable and delete the consideration of each consideration
	You should also not delete the warning message at the top of each email.
4	When you have finished editing the text, follow the different steps below for each email.





Course enrolment email

When you are ready to send this email, tick the box marked "Course enrolment email" and then click the "Save changes" button at the bottom of the page.

If you enrol users on the course after you have set up and activated the email, they will receive the email.

Users will only ever receive this email once.

Course reminder email

It is suggested that you set the "Email date" field to two weeks prior to the deadline for completing the course.

When you are ready to send this email, tick the box marked "Course reminder email" and then click the "Save changes" button at the bottom of the page.

If, after the date you sent this email, you wish to send it again, simply change the date and then click the "Save changes" button at the bottom of the page.

Users will only ever receive this email once on the date you select.

Incomplete course email

Typically, courses are set up so that users have 30 days to complete them. As such, the suggested value in the "Days from enrolment until email is sent" box is 31. Note that this is the number of days after users were enrolled, not the number of days after you first emailed users informing them that they were enrolled on the course.

If, after the date you sent this email, you wish to send it again, simply change the number in the "Days from enrolment until email is sent" box and then click the "Save changes" button at the bottom of the page.

Please note: The 'Course reminder email' and 'Incomplete course email' will only go to users who have not completed the training.



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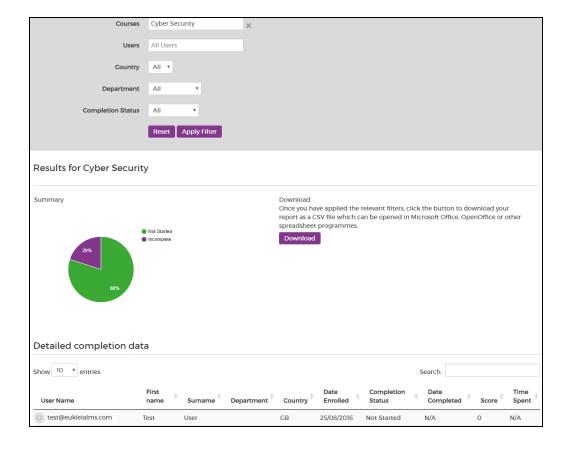
Manager Completion Report

The "Manager Completion Report" page is a training report summarising how users are progressing on their courses. You can view and download data on every user and every course you have ever assigned.

This page functions in the same way as the "My Completion Report" that all users see, except that different filters are available to tenant administrators.

Therefore, please refer to the "Running reports" page in the user guide for all users, in order to view a full overview of this page's functionality. Click "Get Help" in the header bar at the top of the LMS window to open that user guide.

The filters for tenant administrators are summarised below.





Apply filters

You can apply the following filters to narrow down what is shown in the report:

- Courses: Enter a course name (options will appear as you type)
- **Users:** Enter a user's name (options will appear as you type; entries will be sorted alphabetically by first name)
- Country: Choose from a list of all the countries your users are located in*
- Department: Choose from a list of all the departments your users work in*
- Completion Status: Choose from "Not Started", "Incomplete", "Completed"

^{*}There is the option to select a blank row in this drop-down menu. Applying this filter will show users who do not have any information in this field in their profile.



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Get help

Click "Get help" if you require assistance.

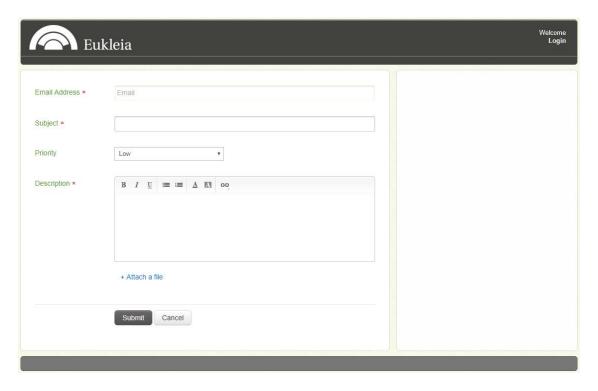
Submit a request

The link takes you to a form, which you should fill in to request assistance.

Please provide as much detail as you can – this will often assist us in understanding the issue. For example, if a user is encountering an issue with a course that you cannot resolve, you might provide information including the following:

- The name of the course
- The browser the issue occurs on
- A description of the steps the user took before the issue occurred
- Screenshots of the issue

Please see below for a screenshot of how to log a support ticket:





Check your existing requests

Clicking "Get help" in the "Tenant administration" block takes you to the request form, shown above. If you do this, and then "Login" from the link in the header bar at the top right of the page, you will be able to see the status of any requests you have submitted.

If you haven't already, you will either need to sign up or set a password to check your existing requests. To do this, follow the instructions at the bottom of the LMS page.