



Learning Management System

LMS Company Manager's User Guide

Welcome to your Company Manager guide to setting up your elearning portal. If you need any help along the way please contact the Support Helpdesk email:

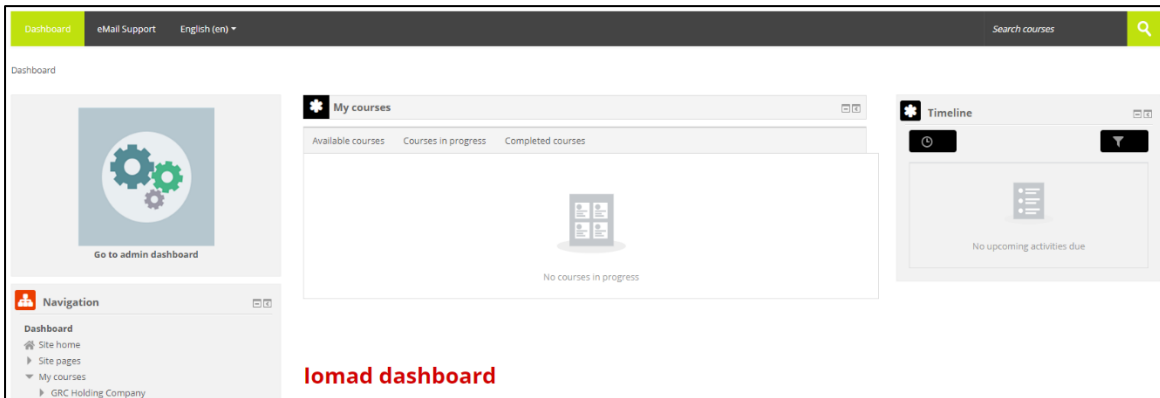
salesupport@itgovernance.co.uk and a member of the team will be happy to help.


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LMS dashboard

As a **Company Manager** (admin role) in the LMS, you will see a landing page like the one below when logging into the system:

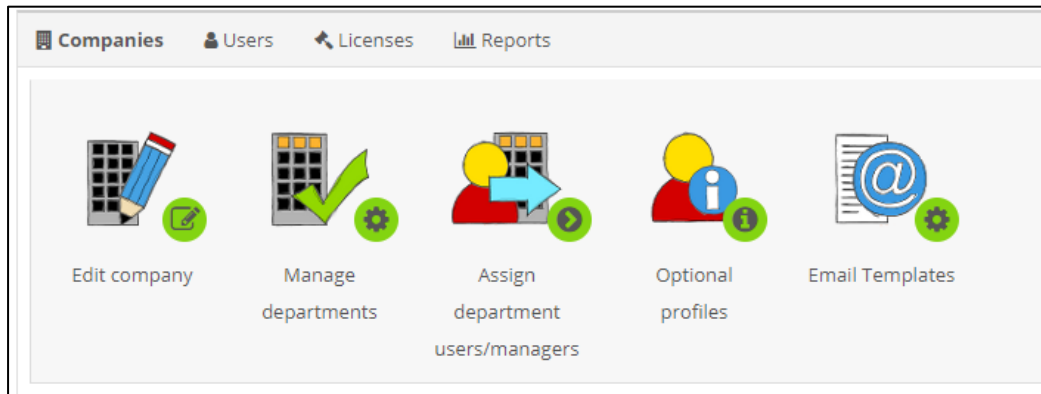


The **My courses** and **Timeline** boxes can be moved aside for a clearer view by clicking the  symbol at the top right of each box. This will dock the box as a tab on the left-hand side of the window.

- Click "Go to admin dashboard" to start.

Companies

The dashboard shows your company name, and has tabs and icons to help you manage your company's training.



Your company account has been prepared for you, but you can use the [Companies](#) tab to:

- Edit company details, logo, colours and heading;
- Create and manage departments within your company; and
- Assign company managers.

Editing your company

- Click [Edit company](#) to customise the look and feel of your LMS.

Select [Appearance](#)

To add your company logo, drag and drop either a jpg or png image file. Please note this should be no larger than 80 pixels high and 150KB. If your image is too large, it will alter the display of the web page for all your users.

When you have finished customising your page, scroll down and click [Save Changes](#). Your browser will then return to the dashboard.

Managing departments

This is not a requirement, but you may find it useful to create departments.

- Click [Manage departments](#).

The departments set up for your company will display.

Click [Create department](#).



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Enter the long name for the department.

Enter a short name for the department. This short name will be used when uploading your users using the CSV upload template. You can read more about this in the [Users](#) section of this guide.

Remember to save your changes.

Assigning users and managers

➤ Click [Assign department users/managers](#).

To assign standard users accounts to their departments (see [Managing departments](#) above), select the arrow next to your company name. This will open a list of all the departments that have been created.

To highlight the department, click the name. This will highlight the department in bold, and display a list of current and potential users available. If you have a large number of users, they will not display in the right-hand box; you will need to search. Type the username in the search box below and select the username from the revised display by clicking it, then click [Add](#). This will move the user to the left-hand side and part of the department group. You do not need to save this action.

To return to the dashboard, click the [Dashboard](#) shortcut at the top left.

To assign an additional Company Manager - select [Company Manager](#) from the small drop-down list. Search or select a user from the right-hand box, then click [Add](#). This will update the user to the new role and grant them appropriate permissions. The user's login credentials will remain unchanged.

Email Templates

Company managers can edit various email templates in line with their company requirements.

Users

This is where you can:

- Create individual users;
- Bulk-upload users;
- Edit user details; and
- Resend user details (reset passwords).

Create users



Click the "Create user" icon.

Complete the following fields: first name, last name, email address (in lower-case).

Check the box [Use email address as user-name](#) – this is recommended. If this box is left unchecked, the system will assign a username automatically.

Leave the [Force password change](#) box checked.

Send password by email – default Yes.

You can amend the date the email is sent if you wish.

Scroll down to [Assign licences](#). Click the arrow to the left, then click the [Select a licence](#) drop-down menu and select the name of the licence you wish to assign. In the box below, click the actual course name, which will then be highlighted in blue.

Now click [Submit and create another user](#) or [Submit and back to dashboard](#).

Editing users



Click the "Edit users" icon.

This is where you can make changes to an individual user profile.

The Edit users page will display a list of all users in your company.

- Click the [User controls](#) to the far right of the username you wish to edit to view the options:

- Edit
- Re-send user details
- Delete
- Suspend
- Change course enrolments
- Change course licenses
- User report

Field name	Option
Edit	Selecting this option will take you to the user's profile where you will be able to modify their: <ul style="list-style-type: none"> • Username; • Personal details; • Email address; and • Password.
Re-send user details	Selecting this option will prompt you to send a system message to the user so they can reset their password.
Delete	This will remove the user profile from the system. All user data including course completions will be unrecoverable.
Suspend	This will suspend the user from the system. You might use this for people leaving the company. Course completion data will remain intact.
Change course enrolments	Not available.
Change course licenses	Additional course licenses can be assigned using this option.
User report	Shortcut to view an individual user report for the specified user.

Uploading users



Click the "Upload users" icon.

You can use the template GRC CSV Upload file to upload a large number of users at once. A copy of this is available from the GRC eLearning Sales Support Helpdesk – click [here](#).



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Complete your CSV file by filling in the data as follows:

- Username: use email address all in lower-case.
- Firstname and Lastname: this should have the initial letter capitalised as this is how the name will appear on certificates.
- Email: as username.
- Department: if required, add a column with the column header 'Department'. Complete the field by entering the short name of the department previously created.
- City: mandatory field.
- Country: mandatory field. Use the standard two-character code, e.g. UK or US. If you are unsure of the code, you can visit <https://www.iban.com/country-codes>. Leave the following fields with the default values:
 - CSV delimiter
 - Encoding
 - Preview rows
 - Upload type: Add new only, skip existing users

Drag and drop the CSV file into the box at the top of the window marked with a blue arrow.

Click **Upload users**. The system will check the file for errors but will not complete the upload.

If the test fails, an error message will be returned that includes details about the error.

Things to check:

- Usernames in lower-case with no illegal characters (blank spaces).
- Duplicated user, someone already has an account on the platform. If there are no errors, the preview screen will display the first ten lines of the CSV.

The Settings section can be left as default. There is no need to amend it.

Scroll down to **Administration** and click the field next to **Select a licence** – select the course licence and the course name will display. Click the course name and it will change to blue.

Finally, click **Upload users**. The system will automatically email all your new users with details of where they need to log in, etc. Do not run the file until you have prepared any notification guidance for your teams. Emails will be sent from noreply@grcelearning.com.



You can download a full list of all your users by clicking the “User bulk download” icon.

Licence Allocation

Licences can be allocated during the user create process (new users). You can assign licences to existing users via the Licences tab, User Licence Allocation. Select the name of the licence you wish to assign from the dropdown menu. All ‘potential users’ will appear in the right hand box, select the user, then click on Assign.

*Quick Tip – Renewals

Ensure your user list is up to date, suspend any users who have left the business – you will be left with an ‘active user list’. Then proceed to the [User Licence allocation area](#), select the named licence from the dropdown menu and simply click on [Assign to all](#). This will assign a licence to all Active users.

Reports

Completion report by course

Courses are listed individually, and a report can be run against each course.

To show all courses against each user, click [Show all users](#).

Click the [Course summary](#) button against each course if you wish to view that course’s data.

Reports will display both historic and current data, along with completion status and certificates.

Drill down into the report by clicking usernames to provide a complete status report for that user. This can also be obtained via the user report.

Users need to complete all elements of the course, for details to appear fully on the report. For example Course 33% Assessment 33% and finally the certificate 33%

Once the three elements are completed the status will show as 100%

Completion report by month

A chart-style report view.

To view the figures, click [View chart data](#) at the bottom left-hand side of the chart.



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Outgoing email report

Displays a full list of emails sent from the system on behalf of your company account.

Support Helpdesk

If you do require additional support or guidance please contact our Support Helpdesk email: salesupport@itgovernance.co.uk