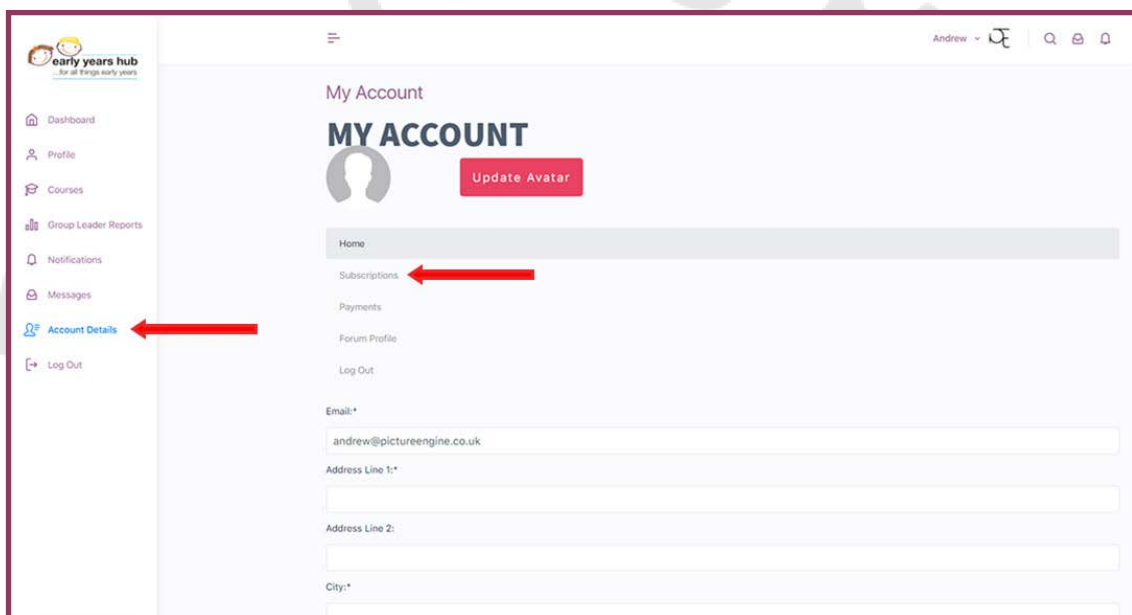


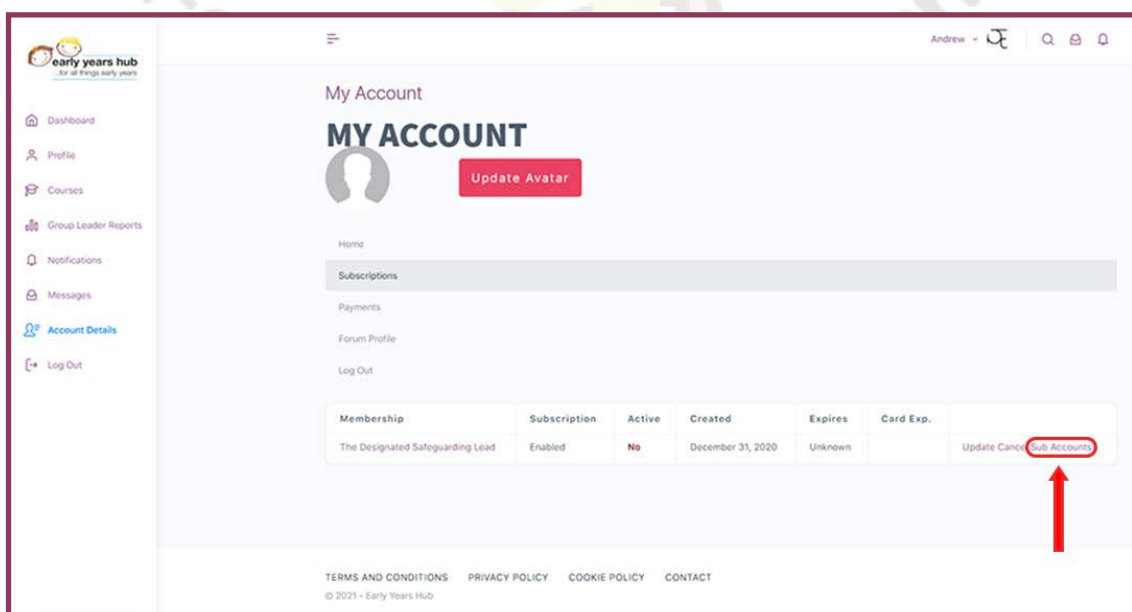
1: Adding Users to your Corporate Training Account

As a “corporate” user of the training website, you are able to add sub-accounts. One user is normally designated as the lead, responsible for doing this. We will assume that as you’re reading this, you are the “lead user”!

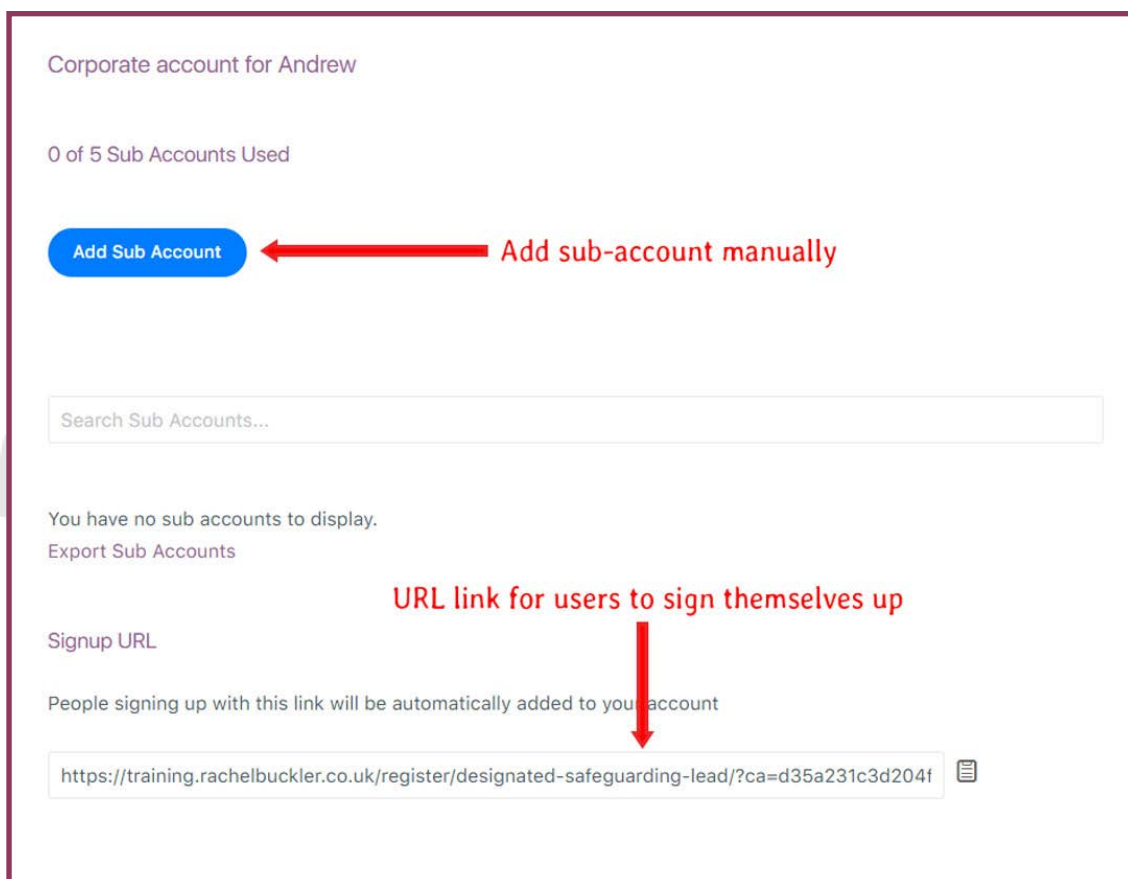
To get started adding your team members, go to <https://training.rachelbuckler.co.uk/my-account/> or use the **Account Details** link in the left hand menu; once you’re there, click on **Subscriptions** (see below):



In the next screen that opens you will see the course you have purchased, and on the same line you should see **Sub Accounts** - click on this (see below):



In the next window, you will usually see your own courses, and then if you scroll down you should see “Corporate account for {your name}”. If you don’t see this, please contact us to have your corporate account activated. In the corporate account sections, you’ll see how many sub-accounts you have available and how many are used, and you have two options for adding users.



The LOWER option allows you just to copy a unique URL to email out to all of your intended users. They can then sign themselves up, entering their own preferred email address, but anyone signing up using your unique URL is added to your account as a sub-account automatically.

BEWARE - once all of your sub-account spaces are filled, the link will stop working, so you should take care that no-one shares it outside your organisation or accidentally signs up twice. If you think this has happened please contact us with the details.

The UPPER option allows you to enter each of your users’ details manually, and if necessary send them a “Welcome” email asking them to log in and set their password. If you click the blue **Add Sub Account** button you will see the sub-account form expand, as shown in the screen below:



Managing Users

Corporate account for Andrew

0 of 5 Sub Accounts Used

[Add Sub Account](#)

Existing Username

- OR -

Email

First Name

Last Name

Send NEW members the welcome email

[Submit](#)

Simply enter the email address, first name and last name of the person you wish to add. You should also tick the box that says “Send NEW members the welcome email”, then just click submit. As soon as you do that, your sub-account is created (and therefore one less is available), but your new user still needs to sign in and set a password before they can use it.

If your user is ALREADY a member of the site - for example if they were already signed up for a different course - you need to add them using their existing username. This is almost always “firstname.lastname” OR their email address, but if you’re not sure you can always contact us to check. As you start to type in the Existing Username box, the software will auto-fill with suggested names - please take care to add the correct user if you use this method.

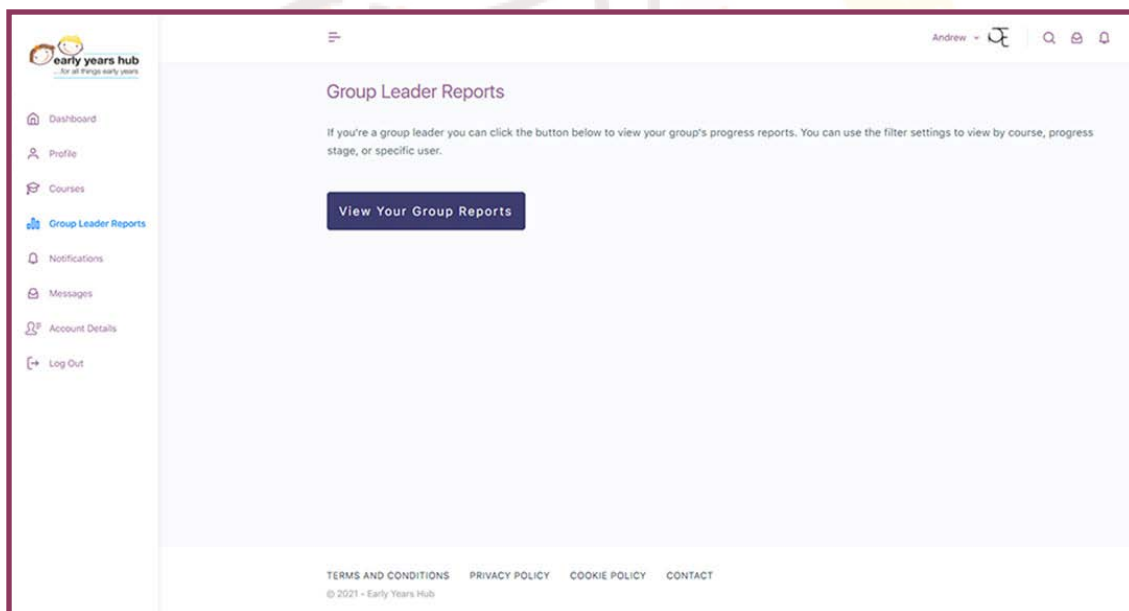
Once you have added sub-accounts, OR users have signed up using the unique URL emailed to them, you will be able to see a list of all of your sub-account users in this same screen.

2: Monitoring User Progress (OPTIONAL)

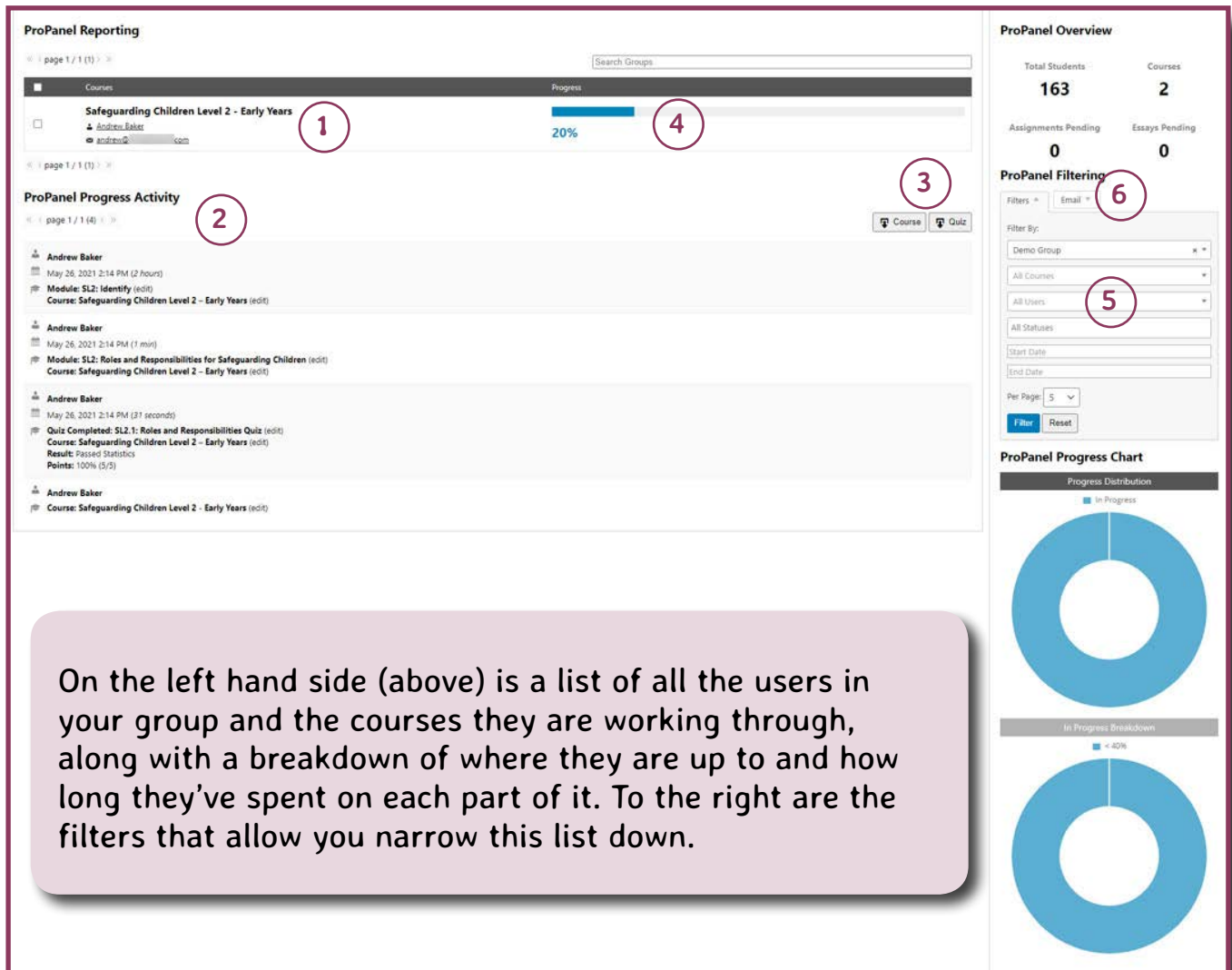
Corporate purchasers of training have the option to monitor their users' progress through the training. This can often be very useful if, for example, you have users based at a variety of remote sites and you need to make sure they complete their training in time for a scheduled live session with Rachel. To do this we need to add a feature called "ProPanel" to your account. If you would like this functionality enabled please contact us to request it, as we don't provide it by default.

ProPanel works by creating a "user group", with one group leader. Typically the "lead" user would also be the ProPanel group leader with the sub-account users set as group members, but that doesn't have to be the case. If you want a member of your admin staff to be the "lead" for setting up sub-accounts, but someone else to actually monitor the progress, that's also possible as long as the person monitoring progress is enrolled in the same course. We will need to access your list of sub-accounts in order to enable ProPanel user monitoring.

When it is enabled you will see an additional heading in the left hand menu called **Group Leader Reports**, and if you click on it you will see a **View your Group Reports** button:



Clicking on the button will take you to a new **ProPanel Reporting** screen, with a variety of options and filters. In the next graphic, all the various features available on the **ProPanel Reporting Screen** are identified with numbers, and their functions are listed underneath:



ProPanel Reporting

page 1 / 1 (1)

Search Groups

Courses

Progress

Safeguarding Children Level 2 - Early Years

Andrew Baker

20%

ProPanel Progress Activity

page 1 / 1 (4)

Andrew Baker

May 26, 2021 2:14 PM (2 hours)

Module: SL2: Identify (edit)

Course: Safeguarding Children Level 2 - Early Years (edit)

Andrew Baker

May 26, 2021 2:14 PM (1 min)

Module: SL2: Roles and Responsibilities for Safeguarding Children (edit)

Course: Safeguarding Children Level 2 - Early Years (edit)

Andrew Baker

May 26, 2021 2:14 PM (37 seconds)

Quiz Completed: SL2.1: Roles and Responsibilities Quiz (edit)

Course: Safeguarding Children Level 2 - Early Years (edit)

Result: Passed Statistics

Points: 100% (5/5)

Andrew Baker

Course: Safeguarding Children Level 2 - Early Years (edit)

ProPanel Overview

Total Students: 163

Courses: 2

Assignments Pending: 0

Essays Pending: 0

ProPanel Filtering

Filters: Email

Filter By:

Demo Group

All Courses

All Users

All Statuses

Start Date

End Date

Per Page: 5

Filter Reset

ProPanel Progress Chart

Progress Distribution

In Progress

In Progress Breakdown

In Progress: 40%

On the left hand side (above) is a list of all the users in your group and the courses they are working through, along with a breakdown of where they are up to and how long they've spent on each part of it. To the right are the filters that allow you narrow this list down.

- (1) Course and Username, along with the user's email address
- (2) User's detailed progress in each part of the course, with a breakdown of time spent completing each part and the scores for any end-of-module quizzes completed.
- (3) Buttons to download user progress data for either course or quizzes as CSV files
- (4) User's progress bar for a quick visual check
- (5) Use the options in the filter panel on the right hand side to filter the users displayed on the left - for example if you have multiple courses you can filter for those, or you could select "Not Started" in the Statuses filter to view everyone who hasn't started their course yet.
- (6) The "Email" button allows you to send an email to everyone selected in the left hand panel. In the example above, if you filter for "Not Started" status, you could then send all the users who haven't started an email reminding them to get on with it!