Administrator User Guide

Welcome. This user guide will demonstrate how to administer your organization's Open Future Learning account.

How to manage your account, add new users, view or edit account codes.

(Time stamps match the corresponding time of the corresponding user guide video.)

00:18
Managing your account.
After signing in, you will see this overview of your homepage that allows you to review the number of licenses you have remaining and the number of users who are presently active (this figure represents the number of users who have started a module in the last 30 days), the number of users you have added to your database, the number of pending users. You can also see if your administrator emails are on or off. Administrator emails inform you when a new user has applied to use the resource and when a user has completed a module. If you want to completely stop or enable all administrator and supervisor emails, you can do so by clicking **Stop Administrator Emails**. The homepage now indicates that this change has taken place. Also from this homepage, you can access your own portfolio of learning modules by clicking **My Dashboard**.

01:16
Administrator Homepage.
To exit your user page and to get back to your Admin homepage, please log out and then log back in again.

01:25
User guide videos.
Watch our user guide videos by clicking**, How it Works**.

01:32
Updating name or password.
Change password by clicking **My Account**.

01:38
Contact us.
Find out how to contact us by clicking **Contact**.

01:45
Adding new users.

There are three ways to add new users to your account. You can add new users manually, one by one; we call this 'Manual Sign Up.' You can invite large numbers of users to register their own accounts; we call this 'Mass Sign Up.' Or you can upload users using a csv file; we call this 'Mass User Upload.'

Here is how these sign-up methods work.

02:12
Manual sign up.

To sign users in manually, under **User Management**, click **Add User**, enter the user's email address, select what group or department you want them to join and enter their name. In the memo box, you can leave a note for yourself and other administrators. Please note, the user will not be able to read this note. Under User Type, you can select three different types of users.

02:48
Types of Users.

A user will only have access to the learning modules. A supervisor will have access to the learning modules and will also receive email notification when other users within their group complete a module. The email will contain the other user's certificate, interactive and general notes, module summary, and reflective action plan. An admin will have the same rights and access privileges as your administrator account. Click **Submit** to confirm. You have now added a new user to your agency's account. Click **Send Registration Link** to notify the new user of their account and so they can create their own password and sign themselves in. If you wish, you can add a personal message for this user. Click **Submit** and an email with a unique registration sign in link is automatically forwarded to the user. In the unlikely event that the user's email account blocks the email from Open Future Learning, click **Create Registration Code**. You can then cut and paste the user's individual registration sign up code into your own personal or work email account and forward it to the user. On this page, you can also compose an individual email to the user.

04:10
Mass sign up.
You can invite large groups of users to independently create their own accounts. This may be helpful if you wish to cut down on the amount of administrative work that entering a large number of users manually would require. Under **Account Management**, click **Add Account Code.** Here, you can create a name for your account code, for example, 'Residential Services.' If you wish, you also have the option of setting an expiration date for this code. Click **Submit** and your code will appear below. Cut and paste this code and post it on your website, in a newsletter, or send it out to your staff in a group email. Ask your staff to put the code into their web browser. They will then be prompted to create their own online learning account. As each user creates their account, you will receive a confirmation email in your inbox. For each user to access the resource and for security reasons, you will need to confirm them. Under **User Management**, click **Pending Users** and you will see a list of people who have applied to have access to the resource. It is your responsibility to vet these names and then click **Approve** or **Disapprove** as appropriate.

5:35
Mass user upload.
You can upload users using a csv file. This approach will be helpful if you already have on file the names and email addresses of the users who you would like to register.
Under **User Management** select **Mass User Upload**. Use the example shown on this page to create your csv file. Please ensure your csv file has all the columns detailed in the example entered exactly as shown. If you would like users to be automatically placed into a group, be sure to list the group name on your csv file. The group name must be entered exactly as it is on your account. If the user is not a member of a group, you can leave this column blank. Click **Choose File** and select the csv file you would like to upload. Click **Submit** to complete this process.

As an administrator you will now receive an email detailing the users who have been registered and details of any errors with your submission. These users will now receive an email from Open Future containing their registration link. When they click the link, they will be asked to create their own password. Once they have created their password, they will be able to login to Open Future. If users do not receive the registration link, please ask them to check their spam folder.

07:00
Viewing and editing account codes.
Under **Account Management**, click **View/Edit Account Codes**. Here, you can see all the codes you have created. Click **View/Edit** to edit the code's name or expiration date. To delete a code, click **Delete**, then click **Okay** to confirm. You are then notified that the code has been deleted. To return to the admin homepage, click **Admin Home**.

How to add groups, view/edit groups, group email.

07:35
Adding groups.
Under **Group Management**, select **Add Group** and you can create groups to divide your staff team. You may want, for example, to create a group for each of your departments. Type in the name of the group. If you want to add any details about the group, you can do so in the memo box, click **Submit**, and the notice confirms that the group has been successfully added. Administrators or supervisors who are members of a group will receive email notifications from users who are also members of that group. If you would like an administrator or supervisor to receive email notifications from multiple groups, press control (CTRL) and click the groups in question. Click **Submit** to save this change. If you would like to turn off email notifications for a single supervisor or administrator, you can do so by clicking **Turn Off Email Notifications**. This change is automatically saved.

08:34
Viewing and editing groups.
Under **Group Management**, select **View/Edit Groups**. Select **View/Edit** to edit the details about the group and select **Submit** when all changes are complete.

08:51
Sending a group email.
Under **Group Management**, select **Group Email**. Here, you can send one email out to all of your groups, or you can select a single group to email. You can further filter this email by whether the user is active or by their status. Click **Submit** to send your email.
How to set module access by user, set module access by group.

09:21
Setting module access by user.
Under **User Management**, select **View/Edit Users**. Locate the user that you wish to establish unique module access rights to and select **View/Edit**. Select **User Module Access**. Any customization made at the group level will be reflected here. Allow or deny module access. Select **Submit** to save customization.

09:49
Setting module access by group.

To set access by group, you will need to have already established groups, or you will need to create and place your staff team into groups. Under **Group Management**, select **View/Edit Groups**. Locate the group that you wish to establish unique module access rights, select **View/Edit**, select **Group Module Access**. To set unique group access rights, allow or deny any one of the individual modules. Select **Submit** to save customization. If a user is a member of a group, the modules they can access are locked to replicate the modules that the group has been permitted access to. To customize what modules an individual user who is a member of a group can access, click **No** under **User Module Access** set to replicate group module access. By default, users have access to our entire resource of modules. You can now customize what modules a user can complete.

How to view/edit users, monitor user progress, extend access to an expired module, view login history/ set reminders.

11:03
Viewing and editing users.

Under **User Management**, click **View/Edit Users** to reveal all of your users. As an administrator, you may view and edit any user's account. To find users more easily, you can filter users by group, by status, or by whether the users are registered or suspended. You can also search for a user by entering part of their name or email in the search bar. Click **View/Edit** to adjust each person's details. Here you can change their name, email, and password. You can also suspend or enable the account. When complete, click **Submit** to save all changes.

11:48
Monitoring user progress.

Under **User Management**, click **User Progress** to review the user's progress. Again, you can filter users by group, by status, or by whether the users are registered or suspended. Click **View Progress** to see how far they have progressed with each module, view their quiz score and download their general and interactive notes, module summary, reflective action plan and certificate. To download a report on all of your users, click the **Module Progress Report** button on your homepage. If you wish, you can then select a range of dates, a group, the user status, or individual modules. Click **Submit** to select a report on all users and all modules. You can then review your reports on an Excel spreadsheet.

12:46

Extending access to an expired module.

Each time a user starts a module, they have 30 days to complete it. After 30 days, their access to the module will expire. If you wish, you can extend a user's access. Under **User Management**, click **User Progress** to review the user's progress. Again, you can filter users by group, by status, or by whether the users are registered or suspended. You can also search for a user by entering part of their name or email in the search bar. Click **View Progress**, and then click the date next to the module you would like to extend access to. Select when you would like the user's access to the module to expire.

13:34

Viewing login history.

Under **User Management**, you can review each person's login history by clicking **Login History**. You can filter users according to their group, click **User Logins** and view when this person has logged in and for how long.

13:53

Set reminders.

You can set reminders to help users remember when it is time for them to retake certain modules. Please note that this function only works for modules that the user has already completed. Under **User Management**, click **Set Reminders**. A list of categorized modules is revealed. Select the type of module, for example, Staff Modules. Select the module you want to set a reminder for. Select when you want the reminder to occur. Your selection is saved automatically. A month before the previously completed module reaches that anniversary, a reminder email is sent to the user, as long as their account has not been suspended. The user is asked to log in and visit the 'My Completed Modules' section, select the module type and select to retake the module in question. If the module has not been completed within a month of the initial reminder, a second email is sent to the user and any corresponding supervisors or administrators. This reminder notifies these people that a reminder was sent a month ago and the module has not been completed. You can click **No Nonrecurring** to turn off a reminder. Your selection is saved automatically.

How to create and edit external training, assign group training, share a module, access more help.

15:23
Creating and editing external training.
Our create and edit external training feature lets you create, award, and track certificates for training conducted outside of the Open Future Learning platform. Under **Module Management**, click **Create/Edit External Training,** click **Create New External Training**. Enter the title of the training, a number that you would like to use to track the training, and the length of the training. Then enter some information about the training. Your entry will appear on the user's dashboard under 'Staff Learning Modules.' If you would like to enter some extended information about the training, you can enter that under 'About This Training, Expanded.' Click **Choose File** under image thumbnail to attach an image to represent this training. Click **Submit** to create this training. You can edit or delete the training by selecting **Edit** or **Delete**.

16:28
Assigning group training.
You can assign that a group of users have completed a training. Under **User Management**, click **Assign Group Training**, select the module or external training that you want to assign, select the users that you want to assign. Click **Group Training Completed**. Users selected will then be tracked as having completed this module or training in your administrator's dashboard. The module or training will also show as completed in the user's 'My Completed Modules' dashboard, where the user can print off their certificate.

17:11
Share a module.
You can share a direct link to a specific module. Under **User Management**, click **Share a Module,** select the type of module that you want to share, select to copy the link to that module. You can now paste that link into an email or on your website and when your users click the link, they will be taken directly to that module.

17:38
Accessing more help.
If you have any other questions about your administrator account, please visit our website. You can then browse our frequently asked questions page or speak to us via our contact page.