

ENVIRONMENTAL ESSENTIALS

# Compliance Administrator Support Document

Learnbyee user guide for Managers

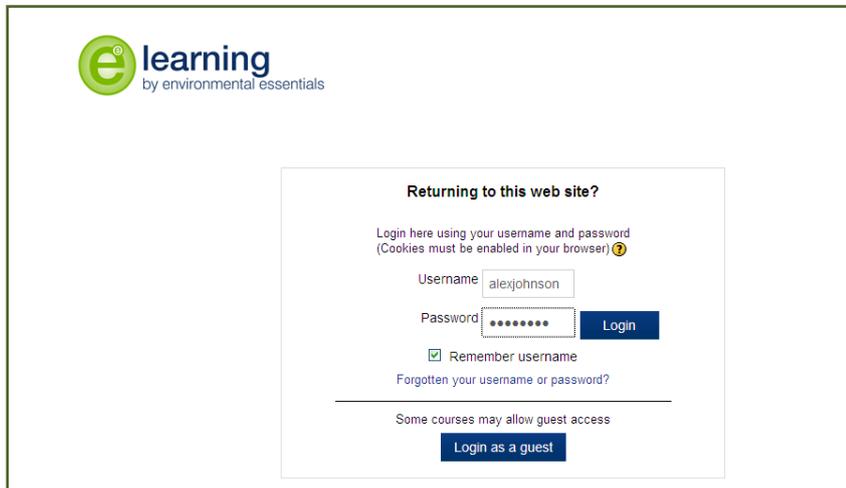
**Your Asbestos Management Partner**

Consultancy  
Survey  
Management Plans  
Remove Specifications  
Analytical Support  
Business Critical Data Management  
Training

## Contents Page

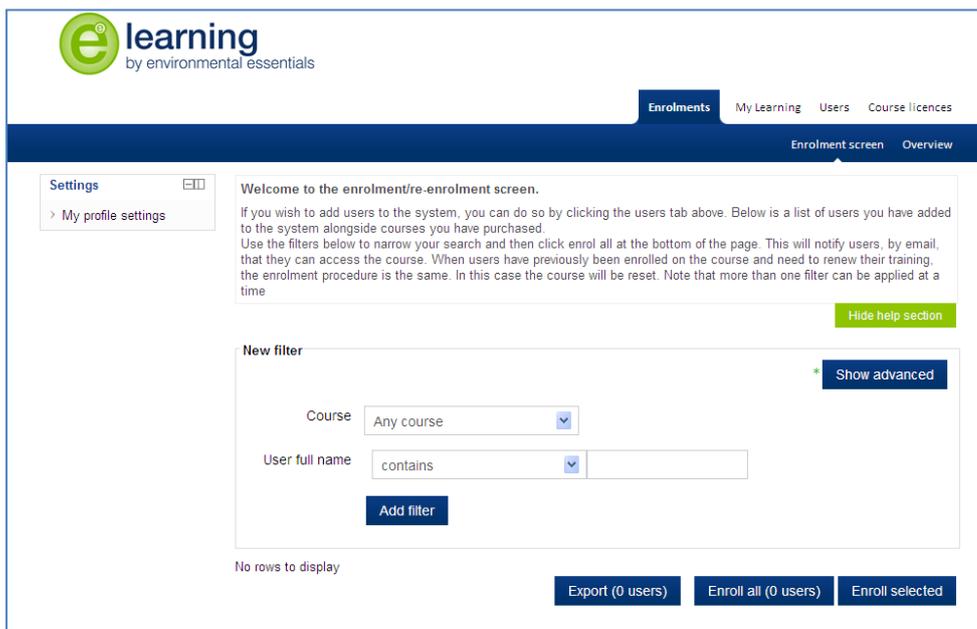
Page number	Contents
Page 3	Logging on and checking license availability
Page 4	How to purchase extra licences
Page 5 and 6	Adding single users to the system
Page 7	Adding multiple users to the system
Pages 8 and 9	Enrolling users
Pages 9 and 10	Monitoring users progress
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Page 11	Viewing users certificates
Pages 12 and 13	Changing users details and how to change passwords
Pages 14 to16	Advanced filtering and viewing of users

You will need to log into the system using your learnbyee username and password before you can access any information. Please ensure your username and password are typed in exactly the same on your welcome email.



As the compliance administrator for your organisation, when you log into the eLearning by Environmental Essentials learning management system you will have access to all of the screens as shown in this document.

- This is the first screen you will see once you have successfully logged into the system. You will need to select the course licences tab to check how many licences you have available before enrolling new users onto the system.



- The course licences tab, once selected, will clearly show how many licenses you have remaining.



Enrolments My Learning Users **Course licences**

Licences Enrolment history Payments history

Settings

> My profile settings

To purchase credits please visit the online store [www.learnbyee.co.uk](http://www.learnbyee.co.uk)

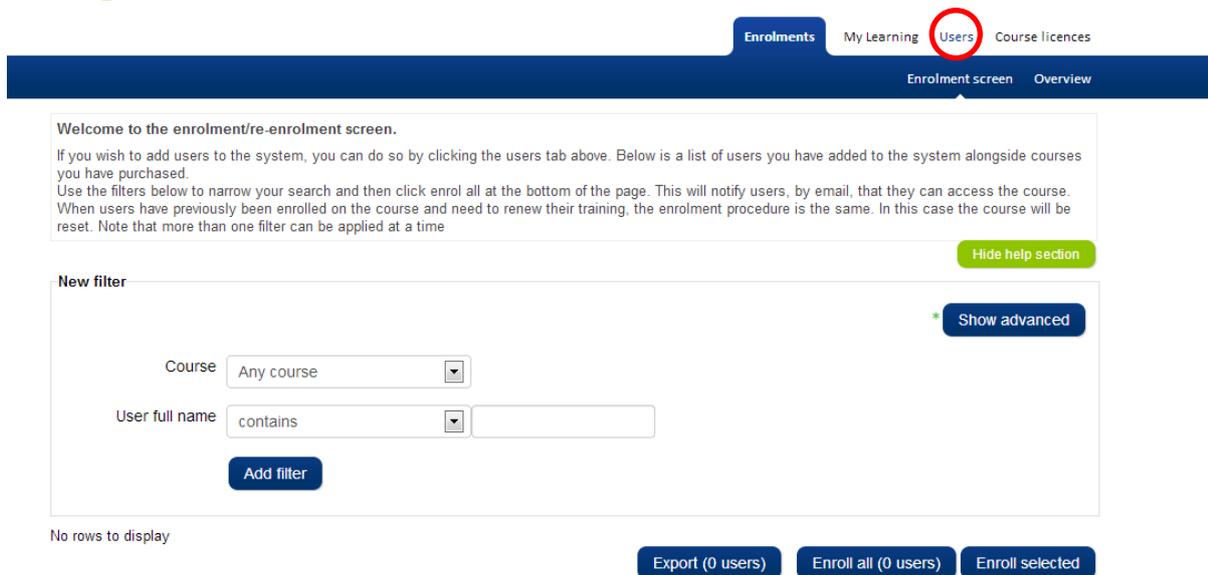
Hide help section

Course Name	Licences Purchased	Licences Remaining
UKATA Asbestos Awareness	4	1

- If you do not have enough licences and need to purchase more you will need to visit [www.learnbyee.co.uk](http://www.learnbyee.co.uk)
- If you are purchasing bulk licenses of 25 or more please contact the support line on 0800 0542354 or email [admin@learnbyee.co.uk](mailto:admin@learnbyee.co.uk) and a member of the team will be happy to assist.

## Stage 1 - Adding users to your organisation

- The first thing you need to do is add the users for your organisation. To do this, click 'Users' as highlighted in Red.

Welcome to the enrolment/re-enrolment screen.

If you wish to add users to the system, you can do so by clicking the users tab above. Below is a list of users you have added to the system alongside courses you have purchased.

Use the filters below to narrow your search and then click enrol all at the bottom of the page. This will notify users, by email, that they can access the course. When users have previously been enrolled on the course and need to renew their training, the enrolment procedure is the same. In this case the course will be reset. Note that more than one filter can be applied at a time

Hide help section

New filter

Course: Any course

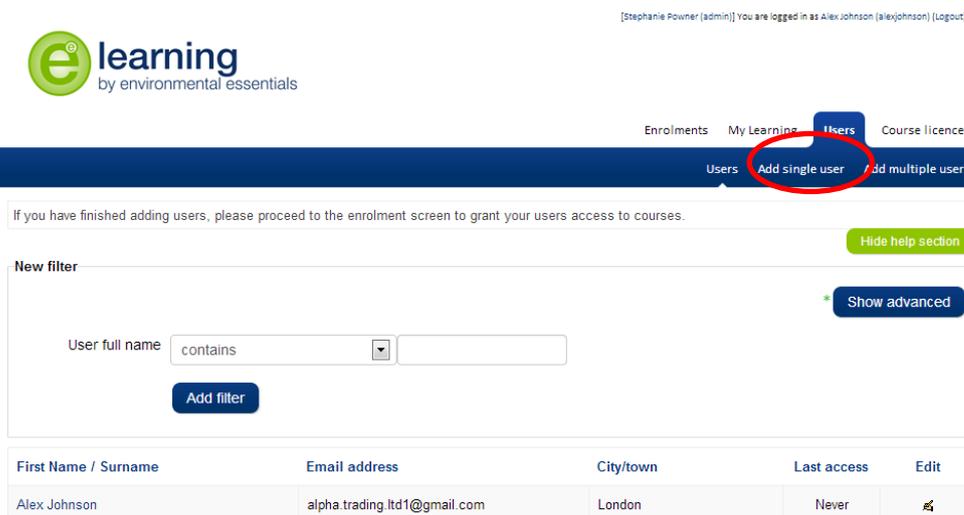
User full name: contains

Add filter

No rows to display

Export (0 users) Enroll all (0 users) Enroll selected

## To add a single user click 'Add single user'



[Stephanie Powner (admin)] You are logged in as Alex Johnson (alexjohnson) (Logout)

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Enrolments My Learning Users Course licences

Users Add single user Add multiple users

If you have finished adding users, please proceed to the enrolment screen to grant your users access to courses.

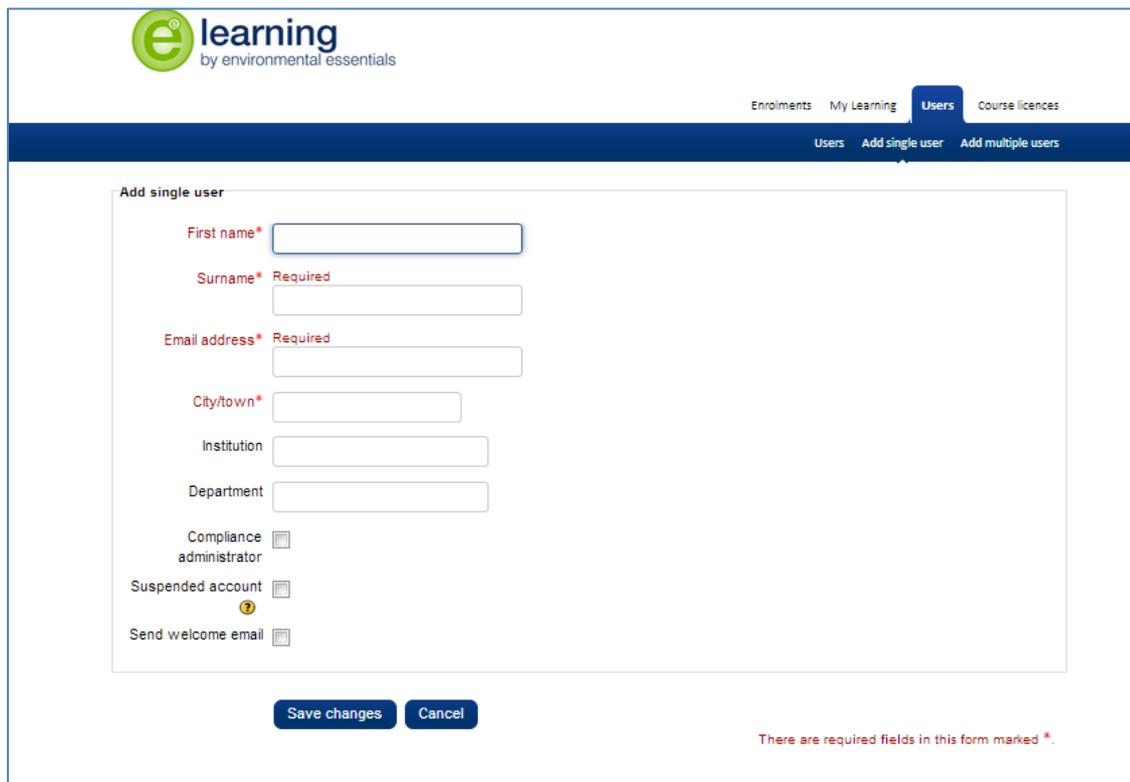
Hide help section

New filter

User full name: contains

Add filter

First Name / Surname	Email address	City/town	Last access	Edit
Alex Johnson	alpha.trading.ltd1@gmail.com	London	Never	



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Enrolments My Learning **Users** Course licences

Users Add single user Add multiple users

**Add single user**

First name\*

Surname\* Required

Email address\* Required

City/town\*

Institution

Department

Compliance administrator

Suspended account

Send welcome email

Save changes Cancel

There are required fields in this form marked \*.

*The First name, Surname, Email Address and City/Town fields are compulsory and indicated with a red asterisk. DO NOT tick welcome email as this will be sent once enrolled*

▼ Add single user

**First name\***

**Surname\***

**Email address\***

**City/town\***

**Institution**

**Department**

**Compliance administrator**

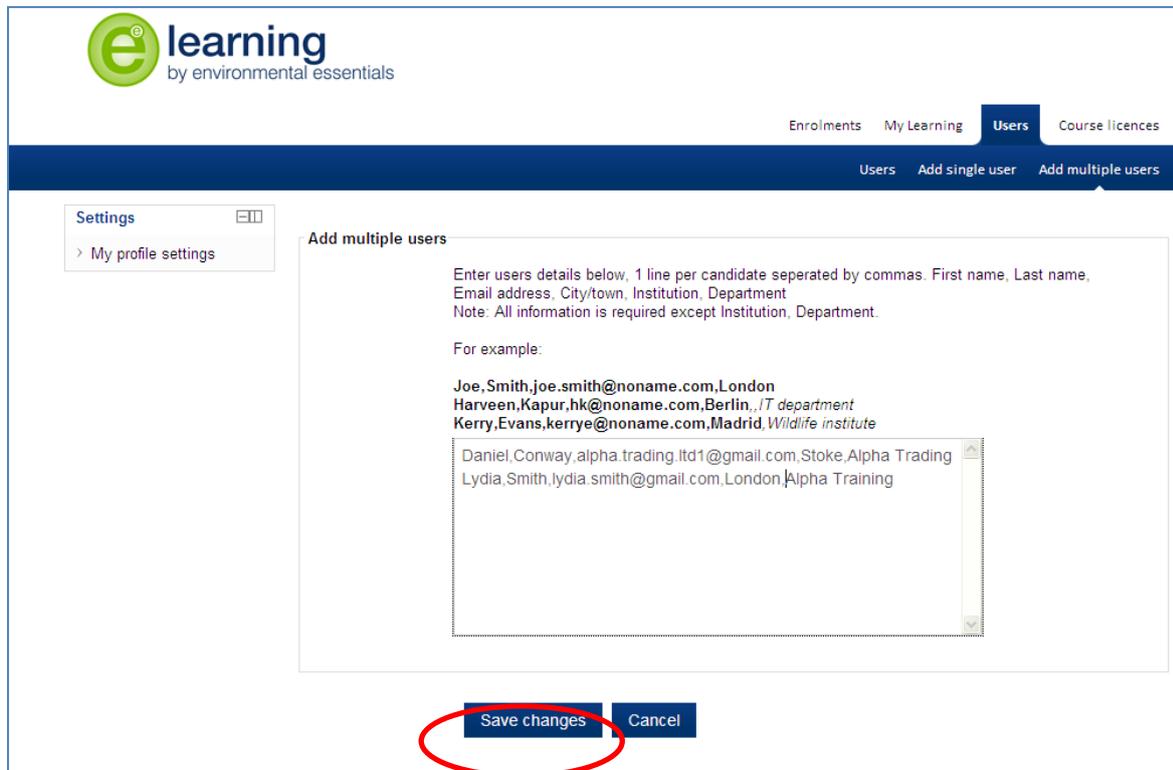
**Suspended account**

**Send welcome email**

Save changes Cancel

There are required fields in this form marked \*.

**To add a multiple users click 'Add multiple users'**



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Enrolments My Learning **Users** Course licences

Users Add single user Add multiple users

Settings  
> My profile settings

**Add multiple users**

Enter users details below, 1 line per candidate seperated by commas: First name, Last name, Email address, City/town, Institution, Department  
Note: All information is required except Institution, Department.

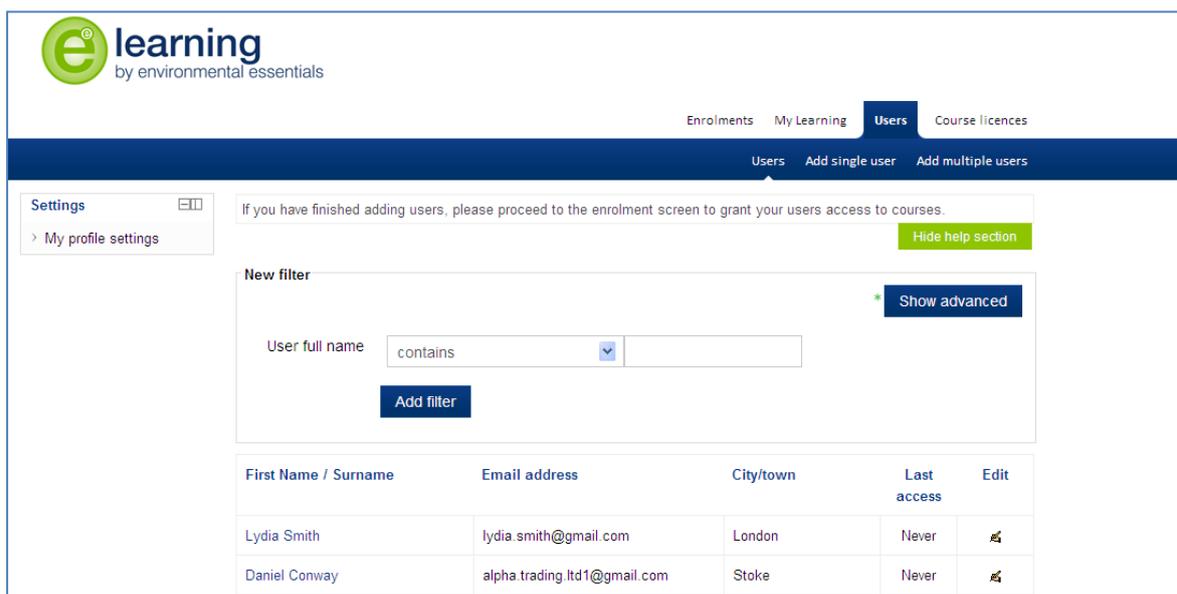
For example:  
Joe,Smith,joe.smith@noname.com,London  
Harveen,Kapur,hk@noname.com,Berlin,IT department  
Kerry,Evans,kerrye@noname.com,Madrid,Wildlife institute

Daniel,Conway,alpha.trading.ltd1@gmail.com,Stoke,Alpha Trading  
Lydia,Smith,lydia.smith@gmail.com,London,Alpha Training

Save changes Cancel

*The email that is added here is where the users login details will be sent too. If you would prefer the login details to be sent directly to yourself enter your own email address here.*

- Click on the 'users ' tab at the top of the screen to view all the users who have been added to your company. **You will only be able to see the users whose details you have previously saved in this screen.**



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Enrolments My Learning **Users** Course licences

Users Add single user Add multiple users

Settings  
> My profile settings

If you have finished adding users, please proceed to the enrolment screen to grant your users access to courses.

Hide help section

**New filter**

User full name contains

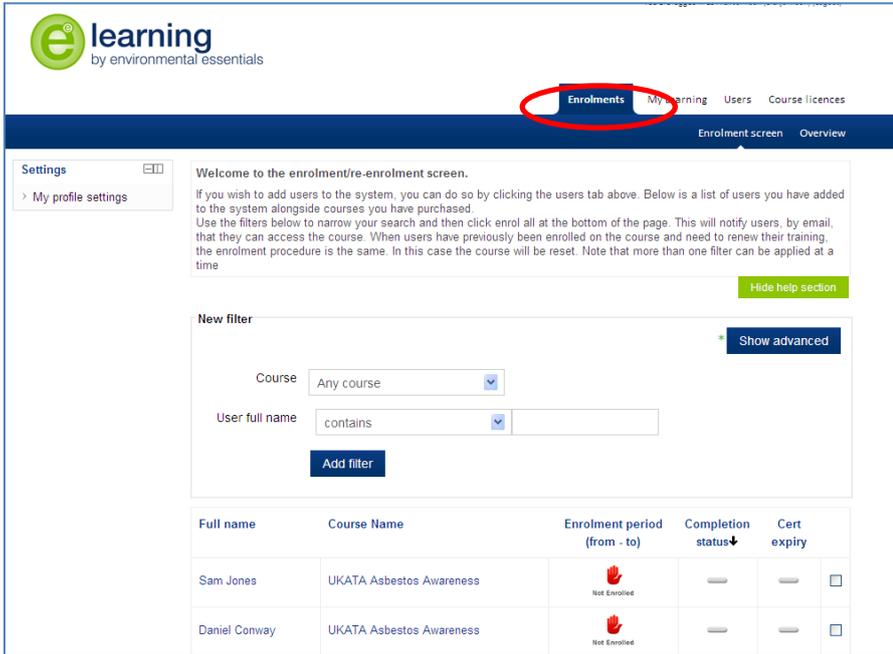
Add filter

Show advanced

First Name / Surname	Email address	City/town	Last access	Edit
Lydia Smith	lydia.smith@gmail.com	London	Never	
Daniel Conway	alpha.trading.ltd1@gmail.com	Stoke	Never	

## Stage 2 - Enrolling users onto a course

- Select the enrolment tab at the top of the page



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Enrolments My learning Users Course licences

Enrolment screen Overview

Settings  
> My profile settings

Welcome to the enrolment/re-enrolment screen.  
If you wish to add users to the system, you can do so by clicking the users tab above. Below is a list of users you have added to the system alongside courses you have purchased.  
Use the filters below to narrow your search and then click enrol all at the bottom of the page. This will notify users, by email, that they can access the course. When users have previously been enrolled on the course and need to renew their training, the enrolment procedure is the same. In this case the course will be reset. Note that more than one filter can be applied at a time

Hide help section

New filter

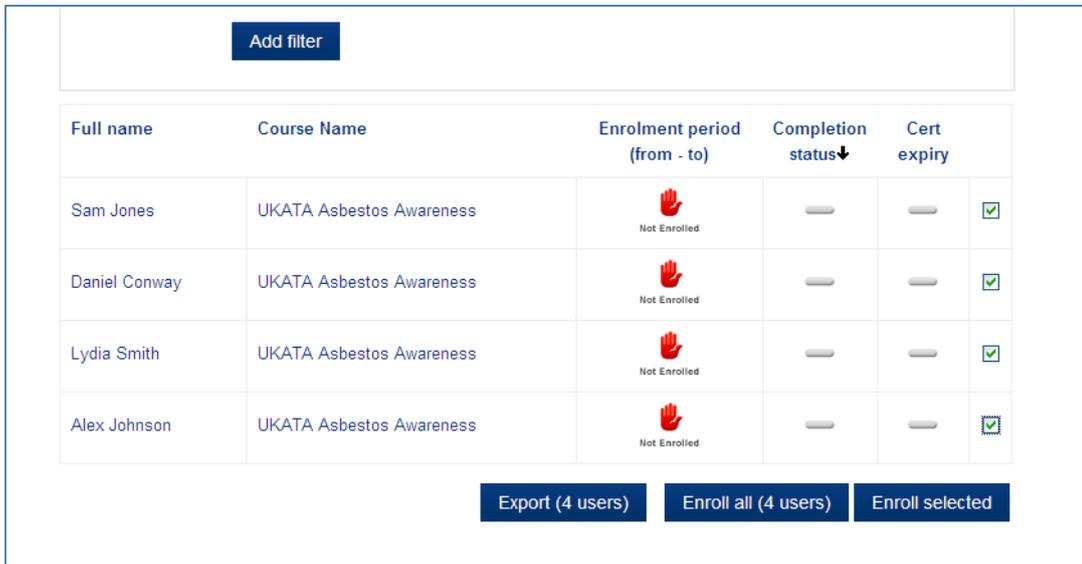
Course Any course

User full name contains

Add filter

Full name	Course Name	Enrolment period (from - to)	Completion status	Cert expiry
Sam Jones	UKATA Asbestos Awareness	Not Enrolled		
Daniel Conway	UKATA Asbestos Awareness	Not Enrolled		

- Tick the box at the end of each individual you would like to enrol and press enroll selected. Alternatively you can select to enroll all at the same time.

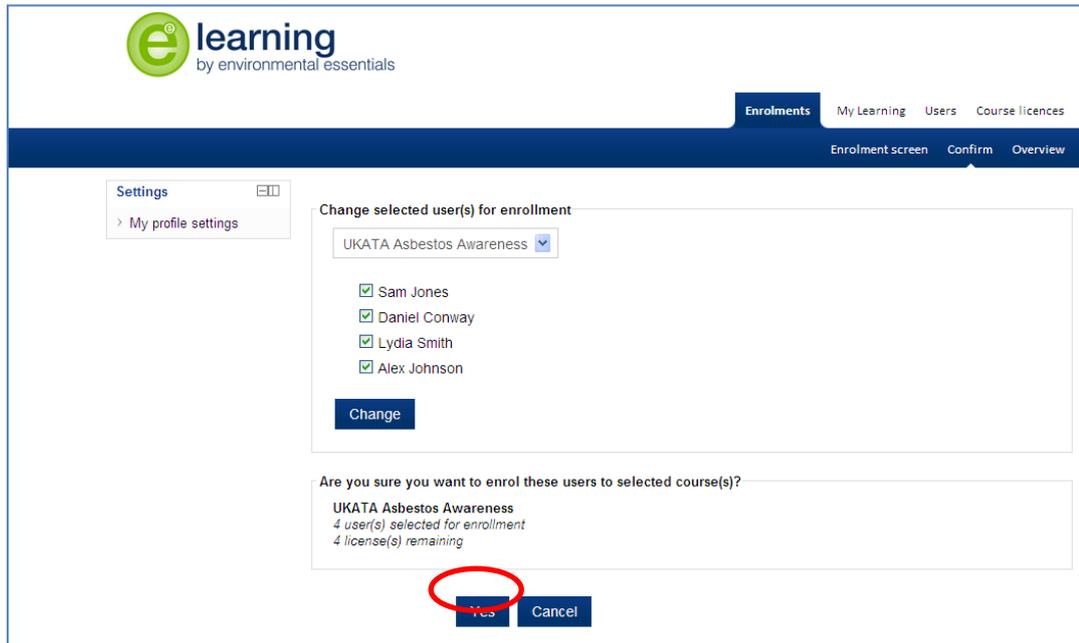


Add filter

Full name	Course Name	Enrolment period (from - to)	Completion status	Cert expiry
Sam Jones	UKATA Asbestos Awareness	Not Enrolled		<input checked="" type="checkbox"/>
Daniel Conway	UKATA Asbestos Awareness	Not Enrolled		<input checked="" type="checkbox"/>
Lydia Smith	UKATA Asbestos Awareness	Not Enrolled		<input checked="" type="checkbox"/>
Alex Johnson	UKATA Asbestos Awareness	Not Enrolled		<input checked="" type="checkbox"/>

Export (4 users) Enroll all (4 users) Enroll selected

- Confirm the enrolment of the users by selecting the yes tab



### Stage 3 - Monitoring progress of users and certificates

- Once users have been enrolled on the enrolment screen you will be able to view the details for when enrolment will run from and to, the completion status of the user and when their certificate will expire (this will only show once the course has been completed and the exam passed)

Full name	Course Name	Enrolment period (from - to)	Completion status↓	Cert expiry
Sam Jones	UKATA Asbestos Awareness	18 JUL 2013 - 16 SEP 2013	<input type="checkbox"/>	<input type="checkbox"/>
Daniel Conway	UKATA Asbestos Awareness	18 JUL 2013 - 16 SEP 2013	<input type="checkbox"/>	<input type="checkbox"/>
Lydia Smith	UKATA Asbestos Awareness	18 JUL 2013 - 16 SEP 2013	<input type="checkbox"/>	<input type="checkbox"/>
Alex Johnson	UKATA Asbestos Awareness	18 JUL 2013 - 16 SEP 2013	<input type="checkbox"/>	<input type="checkbox"/>

- 
- There are a series of different email alerts that the compliance administrator can receive from the 'Learnbyee' team to indicate the status of users within their organisation.

Types of email alerts and notifications
Confirmation Of Enrolment
Course Expires 30 Days
Course Expires 7 days
Failed a course
Forgotten Password
60 Day Renewal
30 Day Renewal

- Once a user has completed the course you can print off their certificate or view it by looking in the enrollments page. You will need to select the user whose details you would like to view.



Enrolments | My Learning | Users | Course Licences

Enrolment screen | Overview

Settings    
 > My profile settings

Welcome to the enrolment/re-enrolment screen.

If you wish to add users to the system, you can do so by clicking the users tab above. Below is a list of users you have added to the system alongside courses you have purchased. Use the filters below to narrow your search and then click enrol all at the bottom of the page. This will notify users, by email, that they can access the course. When users have previously been enrolled on the course and need to renew their training, the enrolment procedure is the same. In this case the course will be reset. Note that more than one filter can be applied at a time

[Hide help section](#)

New filter \* Show advanced

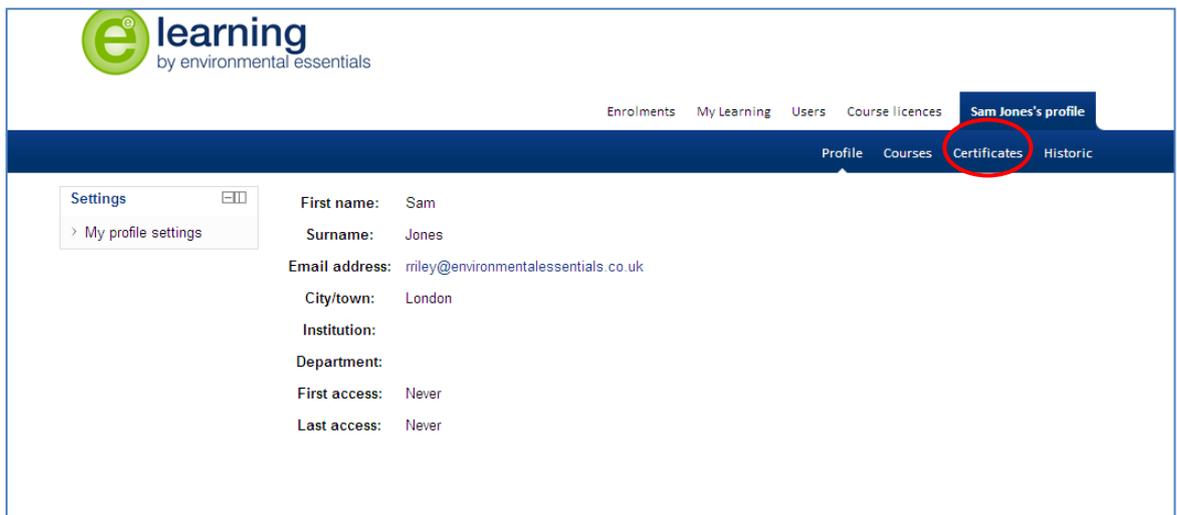
Course: Any course

User full name: contains

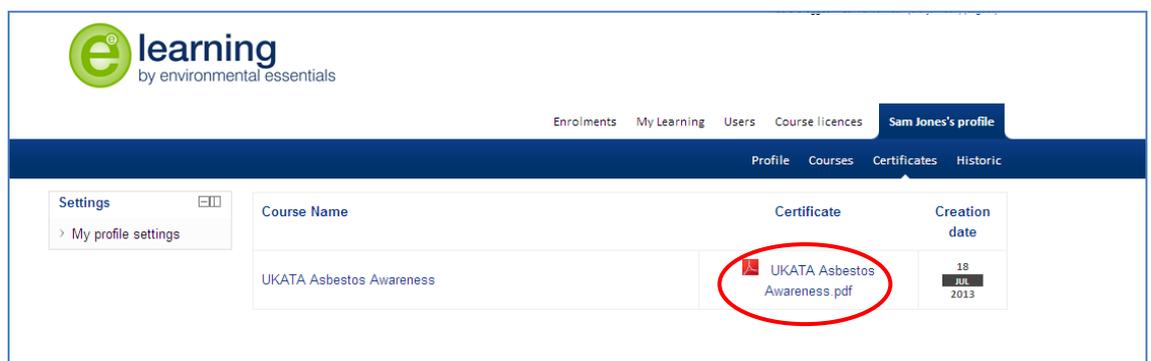
[Add filter](#)

Full name	Course Name	Enrolment period (from - to)	Completion status	Cert expiry	
Sam Jones	UKATA Asbestos Awareness	18 JUL 2013 - 16 SEP 2013	Completed	18 JUL 2014	<input type="checkbox"/>
Alex Johnson	UKATA Asbestos Awareness	18 JUL 2013 - 16 SEP 2013	In Progress		<input type="checkbox"/>

- Once you have selected the relevant user their details will appear on the screen below. Select the certificates tab from the top of the page.



- The users certificate will appear with a red PDF symbol. If you select it will open up the full certificate on a new screen.

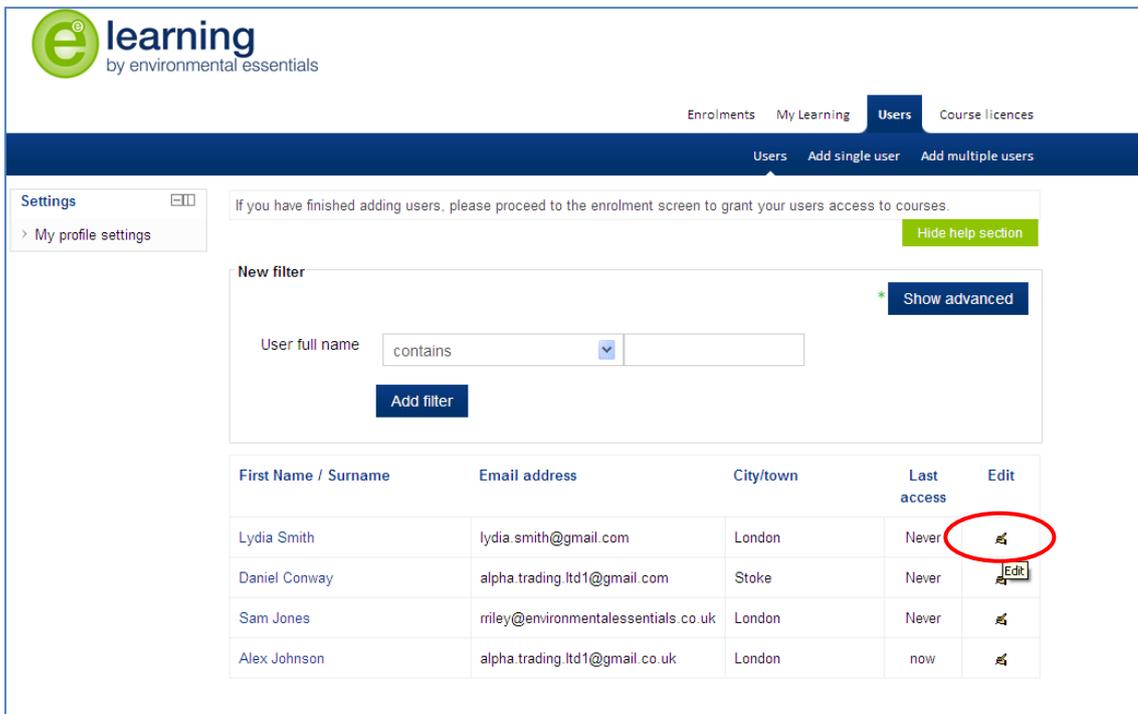


- Once the certificate is open it can be printed



## Stage 4 - Other compliance administrator tasks

- If a user forgets their username and password you can find their details by going into the user tab of the main screen. You will need to select the edit button for the relevant user.
- You can also update a users email address using the edit cog



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Enrolments My Learning **Users** Course licences

Users Add single user Add multiple users

Settings > My profile settings

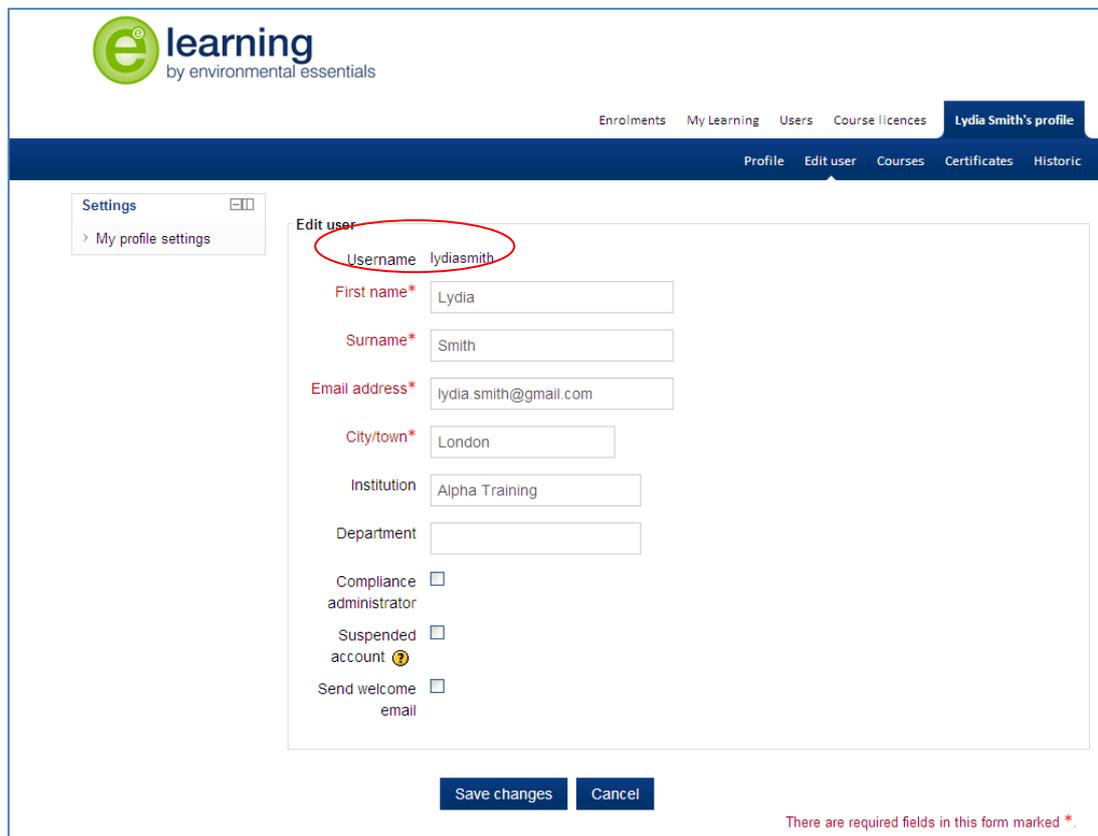
If you have finished adding users, please proceed to the enrolment screen to grant your users access to courses. [Hide help section](#)

New filter [Show advanced](#)

User full name contains  [Add filter](#)

First Name / Surname	Email address	City/town	Last access	Edit
Lydia Smith	lydia.smith@gmail.com	London	Never	
Daniel Conway	alpha.trading.ltd1@gmail.com	Stoke	Never	
Sam Jones	riley@environmentalesentials.co.uk	London	Never	
Alex Johnson	alpha.trading.ltd1@gmail.co.uk	London	now	

- Once you have selected the edit button the full profile page for that user will appear



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Enrolments My Learning Users Course licences **Lydia Smith's profile**

Profile Edit user Courses Certificates Historic

Settings > My profile settings

**Edit user**

Username lydiasmith

First name\* Lydia

Surname\* Smith

Email address\* lydia.smith@gmail.com

City/town\* London

Institution Alpha Training

Department

Compliance administrator

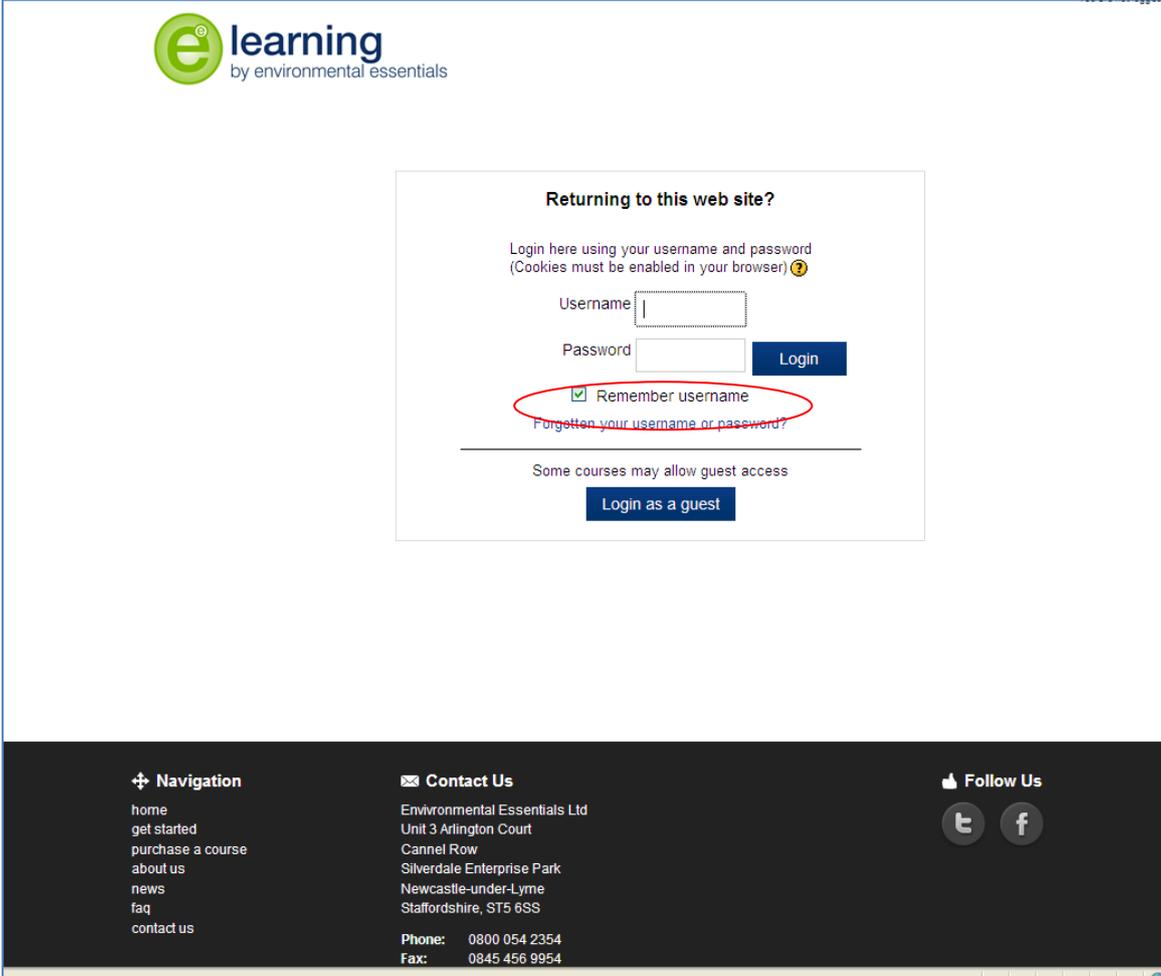
Suspended account  ?

Send welcome email

[Save changes](#) [Cancel](#)

There are required fields in this form marked \*.

- If a user would like to change their password they will need to go to the login page and select forgotten your username or password.
- A new email will be sent to the user . This will allow them to reset their password to one of their own choice.



The screenshot shows the login page for 'e learning by environmental essentials'. The main content area is titled 'Returning to this web site?' and contains a login form. The form includes fields for 'Username' and 'Password', a 'Login' button, and a checked checkbox for 'Remember username'. A link for 'Forgotten your username or password?' is also present. Below the form, there is a section for 'Some courses may allow guest access' with a 'Login as a guest' button. The footer contains navigation links, contact information for Environmental Essentials Ltd, and social media icons for Twitter and Facebook.

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**Returning to this web site?**

Login here using your username and password  
(Cookies must be enabled in your browser) ?

Username

Password

Remember username

[Forgotten your username or password?](#)

Some courses may allow guest access

**Navigation**

- home
- get started
- purchase a course
- about us
- news
- faq
- contact us

**Contact Us**

Environmental Essentials Ltd  
Unit 3 Arlington Court  
Cannel Row  
Silverdale Enterprise Park  
Newcastle-under-Lyme  
Staffordshire, ST5 6SS

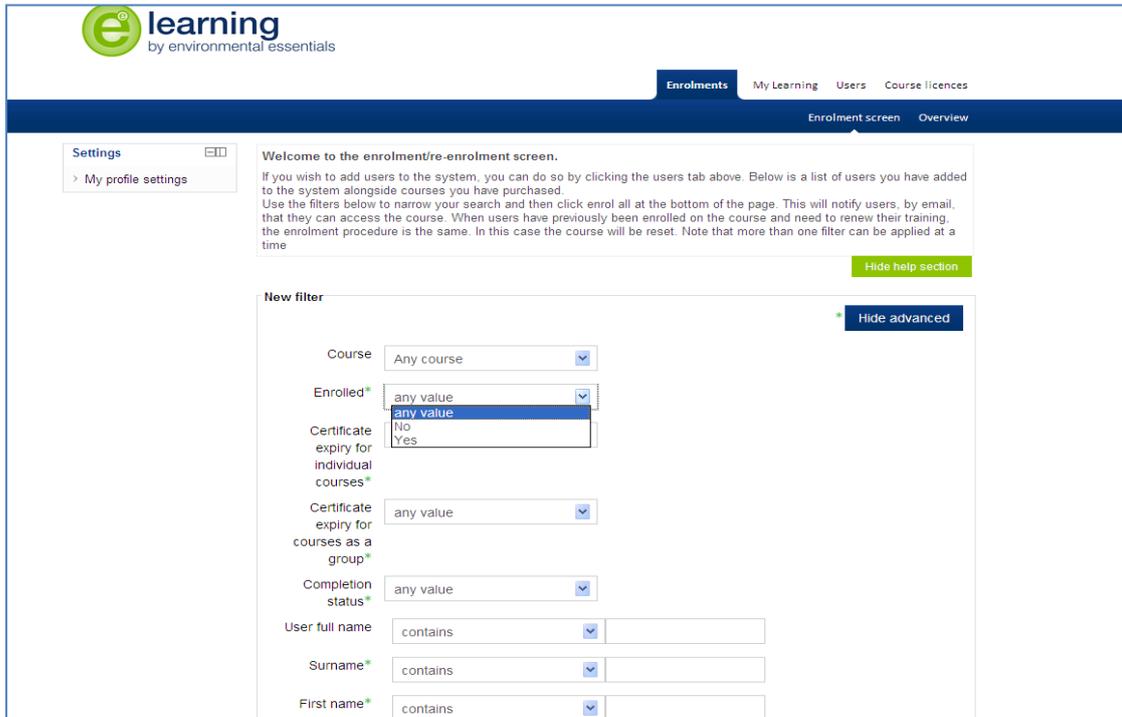
Phone: 0800 054 2354  
Fax: 0845 456 9954

**Follow Us**

## Stage 5 - Advanced compliance administrator features

- Once on the enrolment screen use the filter tool for any required enquiry or use a combination.
- You can look at all Enrolled users as shown below



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Enrolments My Learning Users Course licences

Enrolment screen Overview

Settings > My profile settings

Welcome to the enrolment/re-enrolment screen.  
If you wish to add users to the system, you can do so by clicking the users tab above. Below is a list of users you have added to the system alongside courses you have purchased. Use the filters below to narrow your search and then click enrol all at the bottom of the page. This will notify users, by email, that they can access the course. When users have previously been enrolled on the course and need to renew their training, the enrolment procedure is the same. In this case the course will be reset. Note that more than one filter can be applied at a time

Hide help section

New filter Hide advanced

Course Any course

Enrolled\* any value  
any value  
No  
Yes

Certificate expiry for individual courses\* any value

Certificate expiry for courses as a group\* any value

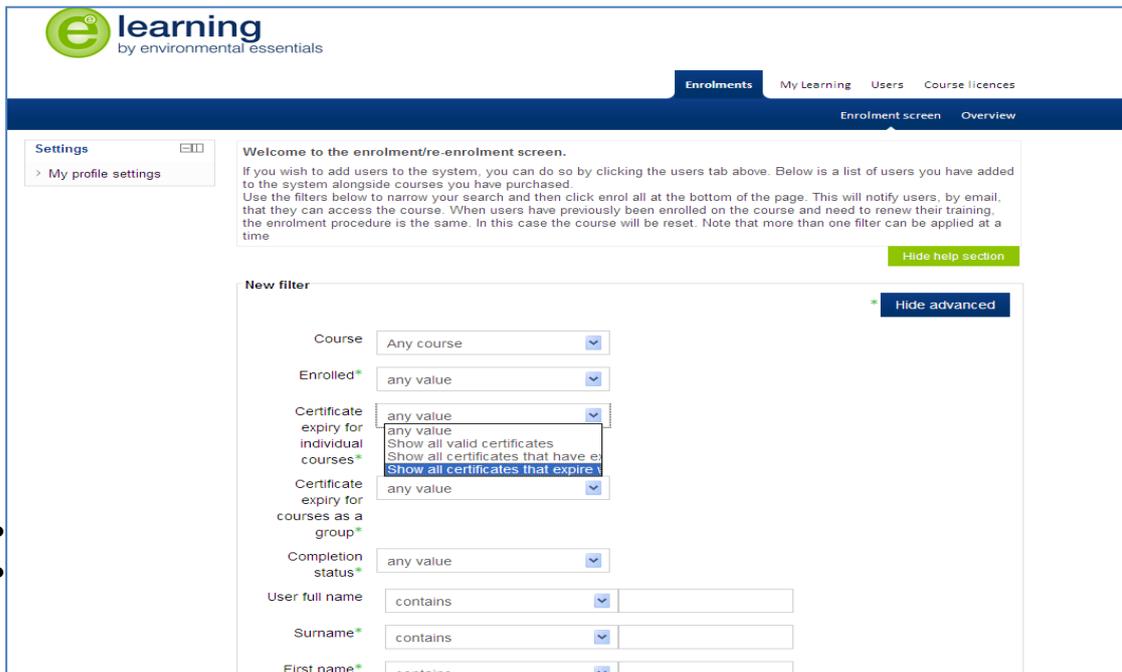
Completion status\* any value

User full name contains

Surname\* contains

First name\* contains

- Or certificate details such as valid, in date. Other options are contained in the drop down list for that particular filter



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Enrolments My Learning Users Course licences

Enrolment screen Overview

Settings > My profile settings

Welcome to the enrolment/re-enrolment screen.  
If you wish to add users to the system, you can do so by clicking the users tab above. Below is a list of users you have added to the system alongside courses you have purchased. Use the filters below to narrow your search and then click enrol all at the bottom of the page. This will notify users, by email, that they can access the course. When users have previously been enrolled on the course and need to renew their training, the enrolment procedure is the same. In this case the course will be reset. Note that more than one filter can be applied at a time

Hide help section

New filter Hide advanced

Course Any course

Enrolled\* any value

Certificate expiry for individual courses\* any value  
any value  
Show all valid certificates  
Show all certificates that have e  
Show all certificates that expire

Certificate expiry for courses as a group\* any value

Completion status\* any value

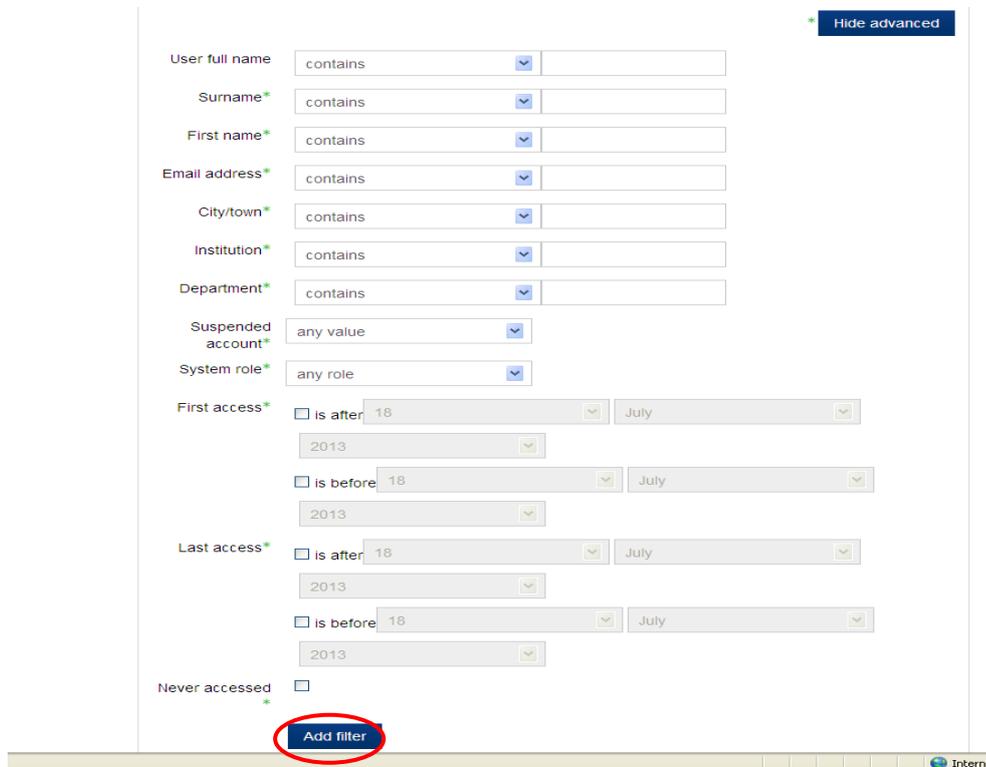
User full name contains

Surname\* contains

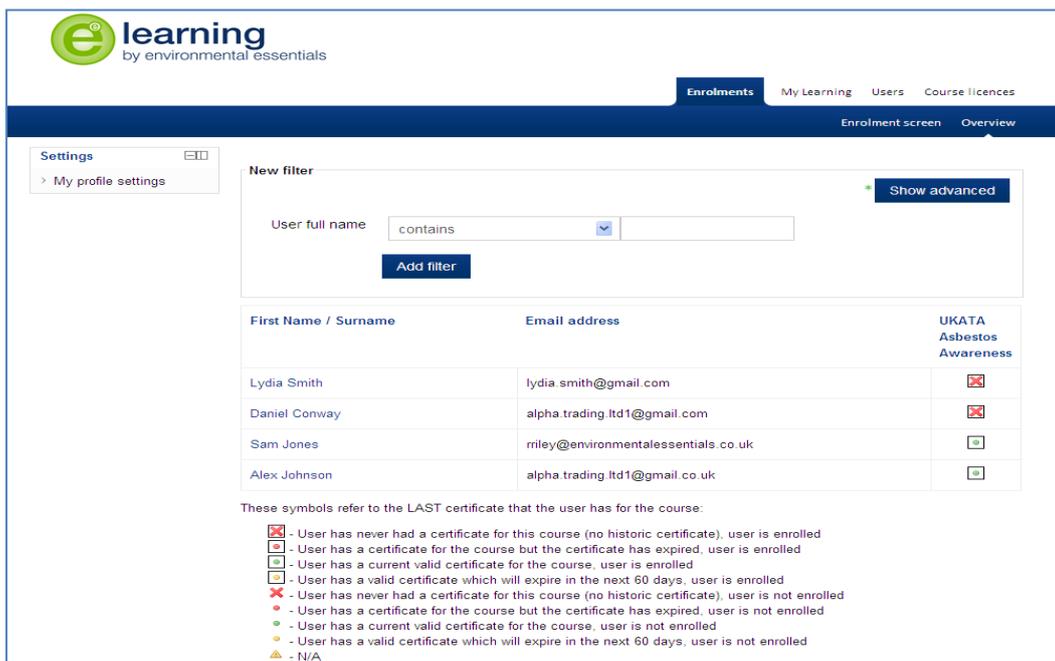
First name\* contains



- Main filter page for users continued. You must apply the filter by pressing the add filter button at the bottom of the page



- Once all filters have been applied you will be able to see using our traffic light system the status of your users in reference to their enrolment, completion of the course and certificate expiry date. This can be followed using the colour coded key that you will be able to see more clearly on the actual system.



First Name / Surname	Email address	UKATA Asbestos Awareness
Lydia Smith	lydia.smith@gmail.com	
Daniel Conway	alpha.trading.ltd1@gmail.com	
Sam Jones	rriley@environmentalesentials.co.uk	
Alex Johnson	alpha.trading.ltd1@gmail.co.uk	

These symbols refer to the LAST certificate that the user has for the course:

- User has never had a certificate for this course (no historic certificate), user is enrolled
- User has a certificate for the course but the certificate has expired, user is enrolled
- User has a current valid certificate for the course, user is enrolled
- User has a valid certificate which will expire in the next 60 days, user is enrolled
- User has never had a certificate for this course (no historic certificate), user is not enrolled
- User has a certificate for the course but the certificate has expired, user is not enrolled
- User has a current valid certificate for the course, user is not enrolled
- User has a valid certificate which will expire in the next 60 days, user is not enrolled
- N/A