



Top 10 management suite functions

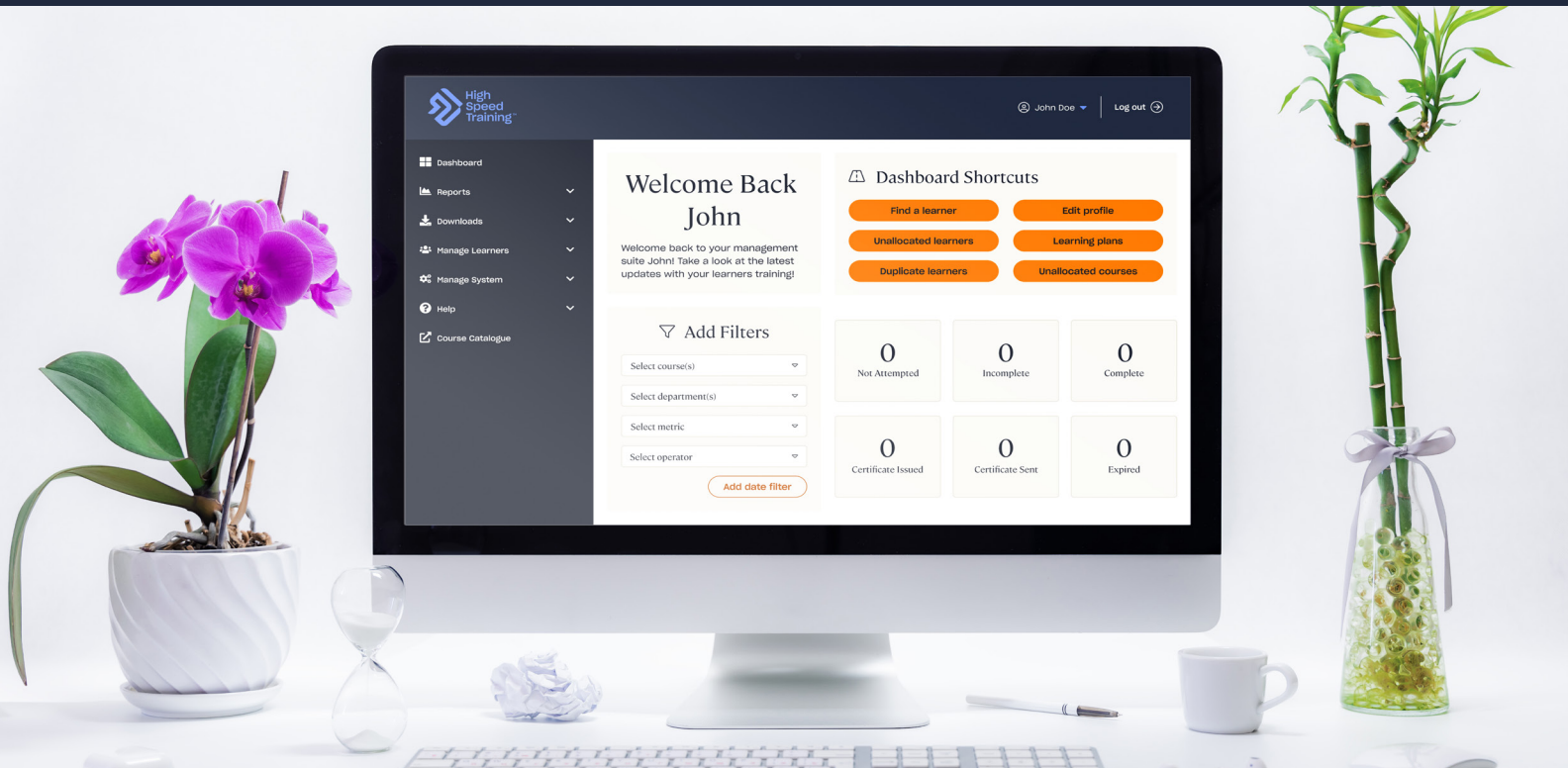


A quick guide to your LMS

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A quick guide: Top 10 management suite functions



The Management Suite contains lots of powerful reporting and helpful features. We recommend taking a few moments to look through these and familiarise yourself with the account. If you would like to discuss any of the Management Suite functions, please call us on 0333 006 7000.

1 TRAINING NOT ATTEMPTED

2 TRAINING INCOMPLETE

3 TRAINING COMPLETE

4 DOWNLOADING A GROUP OF CERTIFICATES

5 ADDING COURSES TO AN EXISTING LEARNER

6 VIEW UNALLOCATED LEARNERS

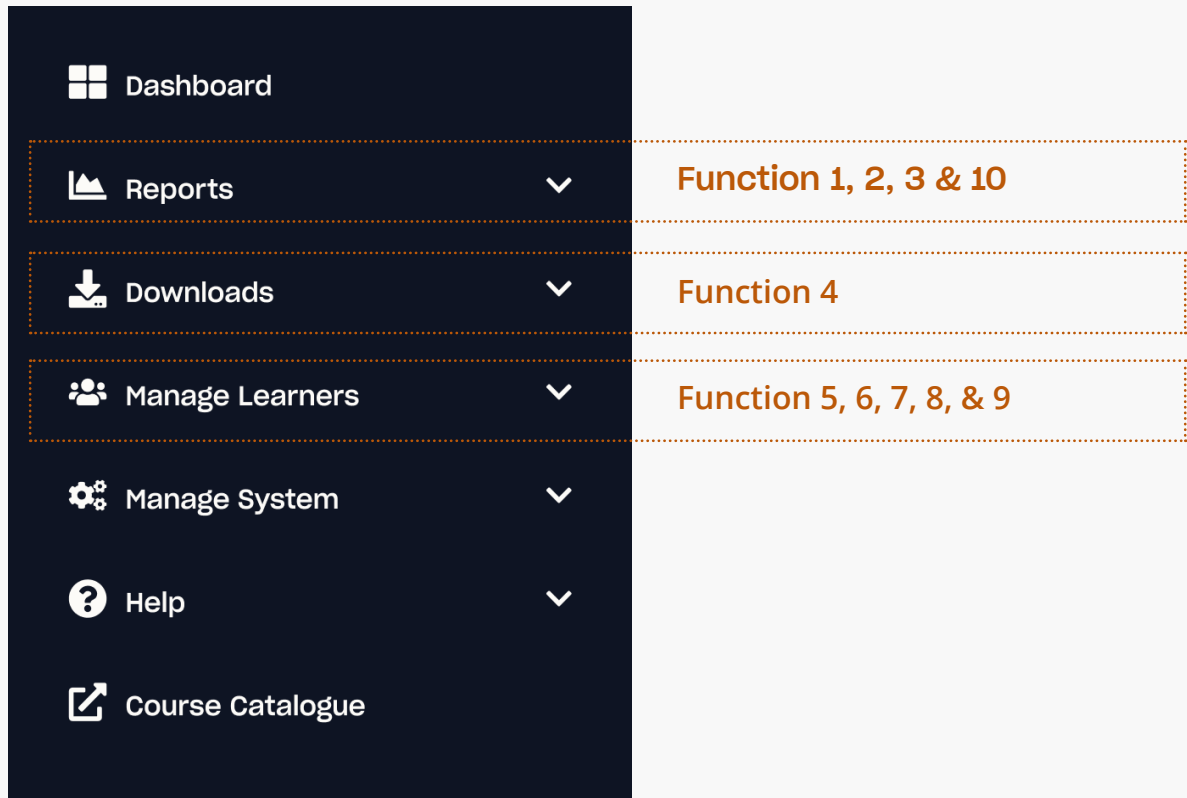
7 ASSIGNING A NAME TO A COURSE AND MARKING IT AS ALLOCATED

8 BUILDING A BUNDLE OF COURSES FOR A NEW LEARNER

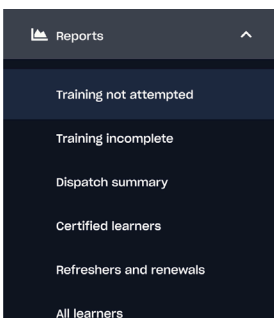
9 DUPLICATE LEARNERS

10 RENEWING A COURSE

Screenshot of the Menu panel to the left of your dashboard

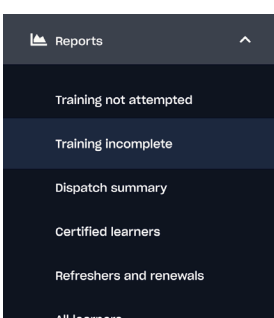


1 TRAINING NOT ATTEMPTED



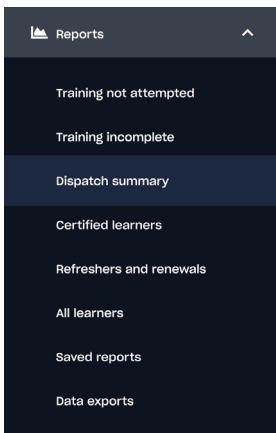
All training that you have allocated to learners, but which hasn't been started yet, can be found in the **Reports** menu, under **Training not attempted**.

2 TRAINING INCOMPLETE



Once a learner has started a course, the course moves to **Training incomplete** in the **Reports** menu. Here you can see the learners progress as they work through the training.

3 TRAINING COMPLETE

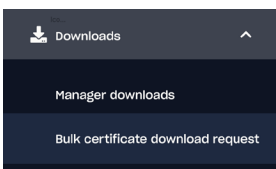


Once your learners have completed their training you will be able to find them in the **Reports** menu under either **Dispatch Summary** or **Certified Learners**.

If you have chosen to pay by invoice and your payment hasn't been received you will find your learners in the **Dispatch Summary** section.

If you have paid for the courses you will find the learners who have completed courses in the **Certified Learners** section. If you would like to download a specific certificate, simply click on the course title for that student, then select the **Generate Certificate** button.

4 DOWNLOADING A GROUP OF CERTIFICATES



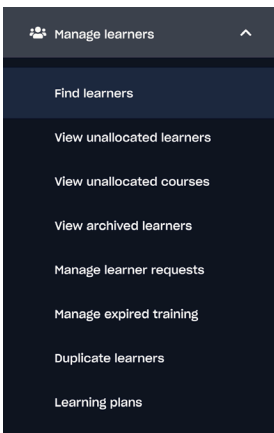
If you need to download several certificates, but don't want to manually sieve through all the courses and download them individually, you can do a bulk download instead.

- ➔ Simply go to the **Downloads** menu
- ➔ Select **Bulk certificate download request**
- ➔ Filter as required
- ➔ Click the **Generate downloads** button.

You will be emailed to confirm the download is ready; this can then be found in the **Downloads** menu under **Manager downloads** or by clicking the **View your existing downloads** button.

[View your existing downloads](#)

5 ADDING COURSES TO AN EXISTING LEARNER

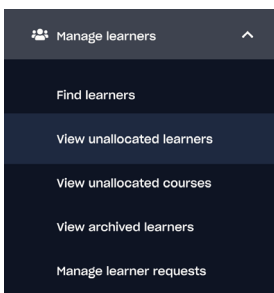


If you already have learners with existing training, you can add a new course to their account without having to provide them with a new set of login details.

- ➔ Simply go to the **Manage Learners** menu
- ➔ Select **Find learner**
- ➔ Search for the learner
- ➔ Click **View learner** on the required learner
- ➔ Use the dropdown list on the right of the screen to select the relevant course from the list of available to use training and click the green button to add the learner to the training.



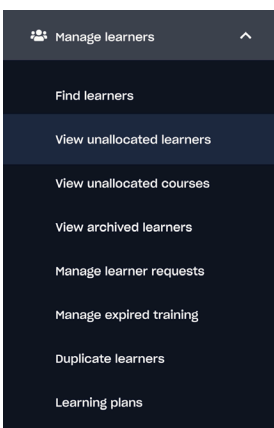
6 VIEW UNALLOCATED LEARNERS



To see an overview of your unallocated courses, simply click **View unallocated learners** from the **Manage Learners** menu.

We recommend you use this section as your go-to when finding out which courses you have available. Any training that hasn't been allocated to a learner yet will be stored here, so any time you order more courses this is the best place to find them.

7 ALLOCATING A COURSE TO A LEARNER

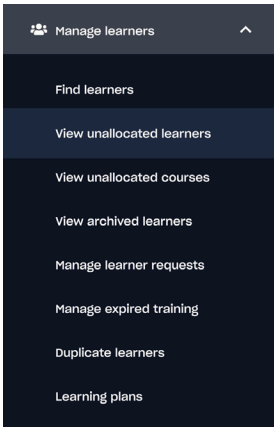


To allocate a course to a learner:

- ➔ Go to the **Manage Learners** menu
- ➔ Click **View unallocated learners**
- ➔ Click the **Allocate** button next to the chosen course
- ➔ Input the learners details including email address
- ➔ Select **Update, Allocate and Notify Learner** to send the learner an automatic email informing them of their login details and instructions on how to access their course

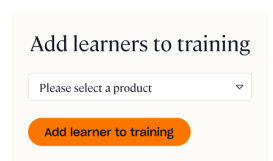
If a learner needs to complete more than one course you can follow the instructions in **Section 5**.

8 BUILDING A BUNDLE OF COURSES FOR A NEW USER



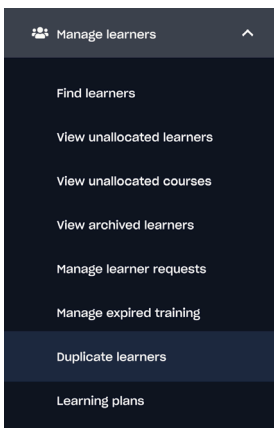
If you need to assign multiple courses to a single learner, this function makes sure the learner has all of their training under one username and password.

- ➔ Go to the **Manage Learners** menu
- ➔ Click **View unallocated learners**
- ➔ Click the **Allocate** button next to one of the chosen courses
- ➔ Edit the form details as required
- ➔ Click **Update, allocate and notify learner**
- ➔ Use the dropdown list on the right of the screen to select the next course from the list of available to use training and click the green button to add the learner to the training. Repeat for all other courses.



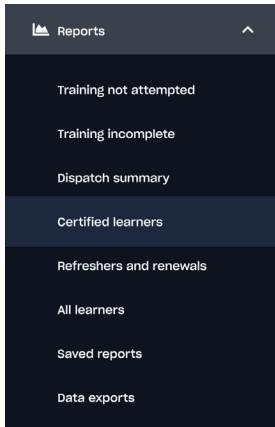
If you accidentally add a course that shouldn't be there don't worry; just get in touch with us and we can split them for you.

9 DUPLICATE LEARNERS



For any number of reasons, you can sometimes find that one learner has multiple usernames within your Management Suite. If you'd like to tidy up the account, you can easily merge their courses into one username.

- ➔ Go to the **Manage Learners** menu
- ➔ Click **Duplicate Learners**
- ➔ Select the learner group you would like to merge from the list of duplicate learners
- ➔ You can now select the one account and username you would like to keep. All courses will be merged into this account
- ➔ Select the accounts you would like merging. If you would like all of the available accounts merging, simply select **Select All** and then **Continue**
- ➔ You will then be taken to a **Merge Summary** page where you will be able to see what the final learner will look like and which previous usernames are now associated with the username. To confirm, just select 'Merge'.



If one of your learners needs to complete a course they have previously completed, you can renew the course for them so they can keep all records on the same set of login information.

- ➔ Go to the **'Reports'** menu
- ➔ Select **'Certified Learners'**
- ➔ Click on the learners completed course title
- ➔ You can then select **'Expire and Renew Course Record'**, this will add an available version of the course to the learner's profile.

For any questions, please get in touch and we will be happy to help.

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