Guidance for Relevant Agencies FORM LMS Manager Accounts

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The role of a FORM LMS account manager is to manage invitations/enrolments/booking cancelations for a specific Organisational Unit. You will also be able to see your staff completions and certificates. A 'Manager' must be registered on the platform by the GSCP Training Team who hold the overall administrative rights to the platform.

You will receive an email asking for you to 'accept' the invitation to the platform on approval of your membership. You will be asked to validate your email and create a password. You must validate your email address within 24 hours of registering or the account will remain inactive, and you will need to contact us to help you. Please check your junk folder for your invitation request and your validation email.

We advise that you add these 3 email addresses to your email address book / safe-senders list to ensure you receive notifications about your account and training. Your ICT department can help you with this.

gsce@melearning.co.uk

form@melearning.co.uk

gscptraining@gloucestershire.gov.uk

When you first log on as a manager, you will see two tabs, People and Catalogue:

People: In the people tab, you will be able to see all the users within your Organisational Unit/s that you have invited. You will be able to view the progress of their courses, by clicking 'History' next to each user's name. You will be able to determine which courses are not started, which are in progress, and which are completed. You can download the certificates by clicking the award icon.

Catalogue: You will have access to the courses on the LMS, and the ability to enrol learners from your Organisational Unit. Please only add the number of courses that you have purchase from GSCP as detailed in your membership agreement. If you require further course purchasing, please contact us before adding to your users so that we can invoice you correctly. If you need to withdraw an enrolment and are unable to do this from the catalogue tab, please email gscptraining@gloucestershire.gov.uk

The individuals you invite to your bespoke area of the platform, will allow them to complete courses which you have assigned them and download their certificates. They must first accept the invitation which is generated from the manager account to their email inbox. They will then be asked to create a password and validate their email address. If they do not validate their email address after setting up a password within 24 hours their account will be frozen and they will need to contact us to activate.

Learners will only see courses which the manager adds to their account. A learner can select a training date on the course they have been enrolled by their manager and are also able to cancel their booking for tutor-led session, up to 7 days prior to a course starting. Please refer to your membership agreement for further terms and conditions.

If a course has been assigned in error, please contact gscptraining@gloucestershire.gov.uk so that we can remove this from the learner account.

Inviting and editing users

You can invite a single user to your workspace. To invite a user, you will need their first name, last name, and email address. **You must assign them to your organisation by selecting it from the drop-down box.**

Inviting a user

1.   Go to People > Users

2.   Click Invite user on the righthand side of the page

You will be shown the below categories to fill in:

1.   User details: Enter the email, first name, and last name of the user you wish to invite. The email address provided will be used for sending notifications and logging in.
2.   You must assign them to your organisation by selecting this in the drop-down menu. **If you fail to do this, you will not see them in your workspace.**
3.   The 'team name' can be the same as the organisation name
4.   You do not need to select an expiry date
5.   You can select the courses you want the user to be enrolled in by searching for and then adding a course in the search box. You can also start to type the name of the course, if the course is not showing on the list. To enrol them on several, you can use Advanced search to see a list of all the courses. When the user accepts the invite, they will be automatically enrolled onto the courses selected. If you are not sure of the course title, please click here to our webpage: https://www.gloucestershire.gov.uk/gscp/gscp-training-curriculum/ . You can also enrol courses at a later stage once the learner account has been created see further guidance below.
6.   Once you have filled everything in, click **Send invitation** in the top right corner of the page. This will send an email notification to the user and they will be given the option to Accept or Reject it. Please note that once the user clicks 'accept' they will need to validate their email address with-in 24 hours by following the instructions in their invitation email. If they do not validate their email address before 24 hours, it will time-out, they will need to contact gscptraining@gloucestershire.gov.uk for support.

After the invites have been sent, you may need to check on/change the invite. Form has the below options for you:

Invite status: You can see if a user has accepted the invitation by checking the status under People > Users. To do this you find the user on the list and click on the Filter > Status > choose option applicable to reveal the status of the invite. When a user has accepted an invite, you will be notified by email and their status will update to 'Active'. If the user has not accepted the invite, the status will remain as 'Invited'.

Resend invite: If an invited user cannot find the email invitation, you can resend the invitation by clicking the 3-dot button and click Resend Invitation. Please note this may appear in their email junk folder until they save the above contacts to their address list.

Cancel invite: If you wish to revoke an invitation, click the 3 dots button and click Cancel Invitation, this will prevent the user from accepting an invitation.

Enrolling learner on to courses:

If you have not added course enrolments as part of the invitation, you can still enrol learners on to a course once they have registered under your organisation. Their account must show as '**active**' for you to be able to do this. You may need to resend the invite if they have not accepted. To **'enrol'**

means this will add the course to their account. It does not select specified dates. You will have to then have to follow the booking instructions further down this guide.

1. Go to: **Catalogue → Courses → Find the desired course → ⋮ → select Enrol learners**
2. In the pop-up window, select the checkbox next to each desired learner.
- To select learners in a specific organisation unit or groups, use the filters at the top of the window.
- To select all learners on the current page, select the checkbox in the top-left of the window next to the **Name** column. This will need to be repeated for each page of learners if you wish to select all learners.
3. Select **Enrol learners**

Booking users on to specified sessions:

After you have invited your users, they must accept the invitation first before you can select dates on their behalf. You will know if a user has accepted their invitation as their account will show as 'ACTIVE' rather than 'INVITED'

1. Go to the '**Catalogue'** page and click **'Events'**
2. Click on '**three dots'** next to the desire course you want to book
3. Select '**View event'**
4. Select **'book learners'**
5. Type in '**learner's login email address**' in **'book people'** box
6. Click '**Book people'** button to book your learners onto the session.

The learner will receive an email to confirm the date and time. Please note that joining instructions are sent out at the end of the booking window, 7 days prior to a session start date.

Users and managers can cancel bookings via their account up to 7 days prior to the course start date. Please see the terms and conditions of your membership agreement for further details.

If someone leaves your organisation and you wish to deactivate their account, please contact gscptraining@gloucestershire.gov.uk

FAQ's

- I get a validation error message when trying to send an invitation: you may have put a space in the phone number or used +44 which is unsupported OR you may have added a space at the start or end of a mandatory field.
- I can't see courses in the catalogue or see available dates – this may take a few moments to appear due to screen loading time and the number of users in your organisation.
- I cannot see the courses on the list when enrolling as part of the invitation process – start to type the name of the course in the box and it should appear.
- There are issues with my e-learning courses running properly - you need to ensure the platform is being accessed via Google Chrome, Firefox or Edge. Other internet sources may cause loading problems.
- I can't see the certificate? Please go to 'my completions' and select the award icon. You will need to first download it to save and print. You will need a PDF viewer application to display the certificate properly.

Please see our webpage for further guidance and support:
https://www.gloucestershire.gov.uk/gscp/gscp-training-curriculum/