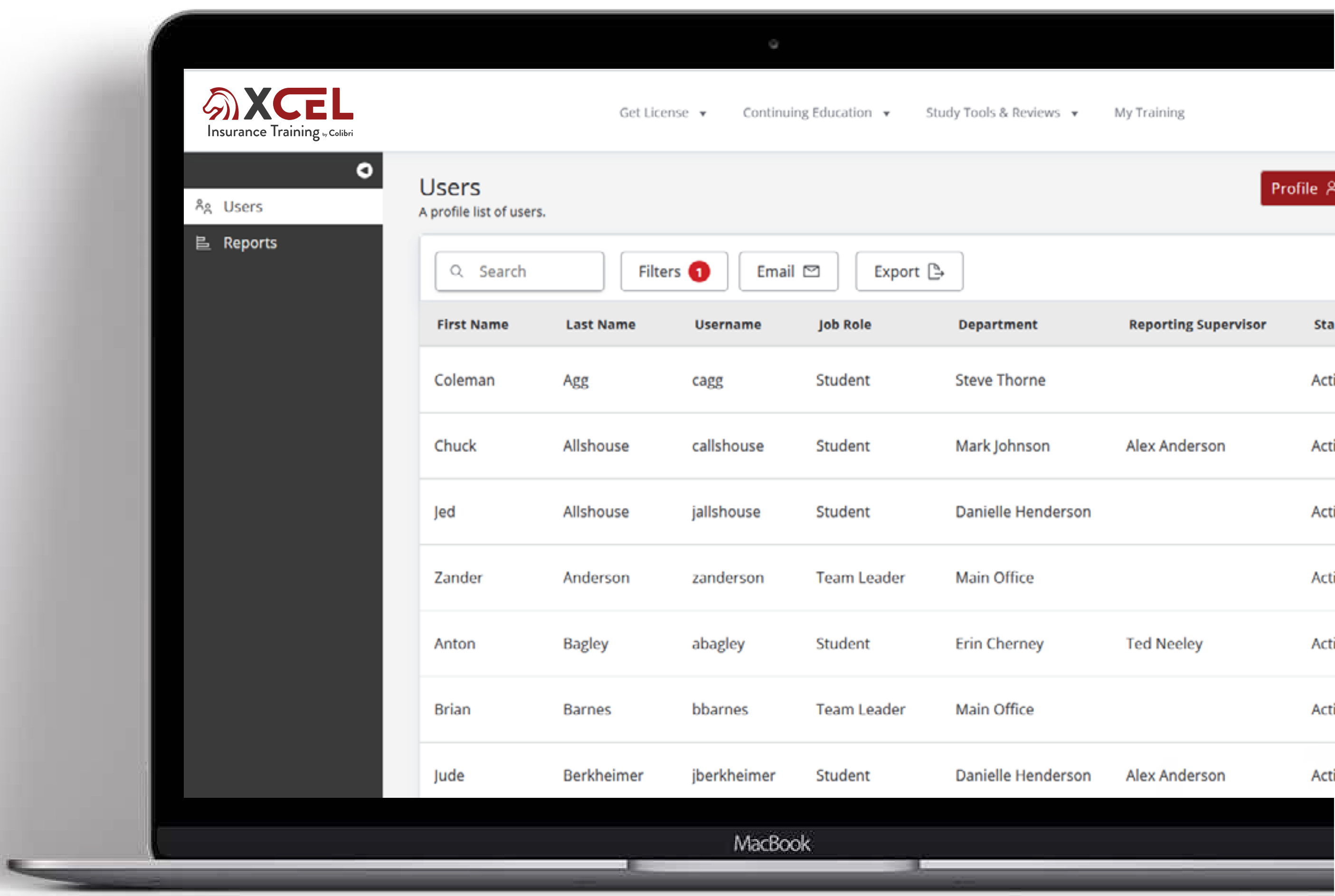
XCEL Insurance Training by Colibri

ADMIN PORTAL USER GUIDE

A Learning Management System with a FRESH EXPERIENCE



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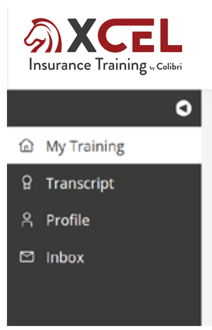
INTRODUCTION

The feature set in the Admin Portal is focused on the day-to-day usage of the administrative features in the learning platform. The portal offers a focused user experience to review individual users and their training progress, as well as schedule and run reports on student progress.

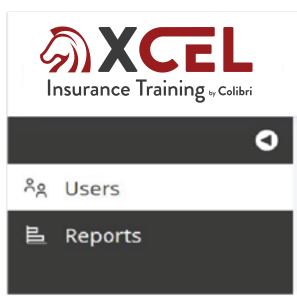
TERMINOLOGY

Understanding this terminology will help you with navigating through this user guide as well as the learning management system (LMS).

Student Portal = student functionality of the LMS



Admin Portal = administrative functionality in a streamlined interface that aligns with the student portal



User = any user within the system regardless of roles and permissions

Student = a user with no administrative access

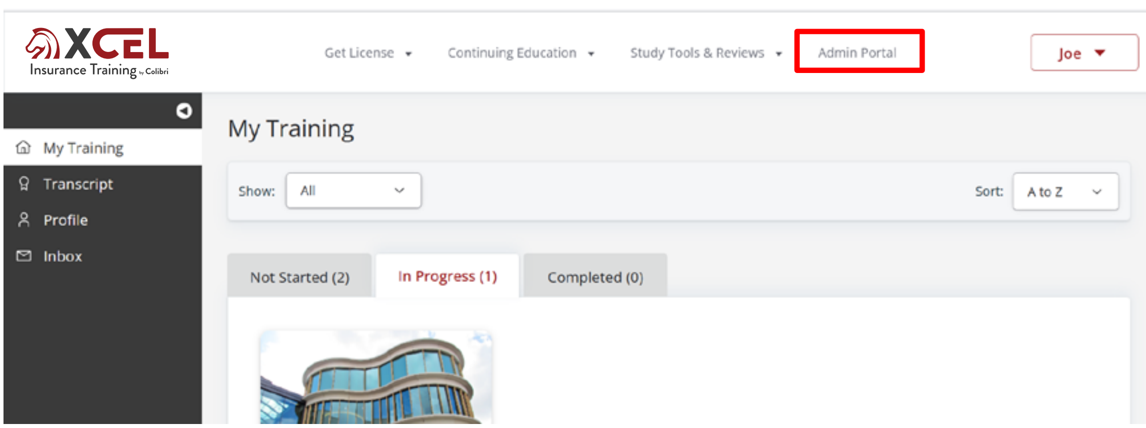
Admin = a user with administrative access, any combination of roles and permissions

NAVIGATION

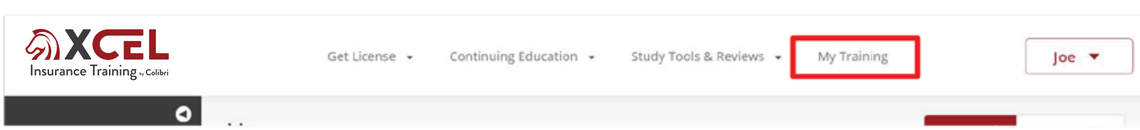
Once a user has access to the Admin Portal they will see an **Admin Portal** link in the top navigation of the Student Portal.

Accessing Your Admin Portal

1. Log into your XCEL Admin Portal by navigating to your **Partner Site** and then clicking **Log in** at the top right corner of the page.
2. Once logged in to your Partner Site, click **My Training** at the top right corner of the page. This will bring you to the Student Portal.
3. For users who have Admin Portal access, an **Admin Portal link** will appear in the top navigation bar. Click on **Admin Portal** to enter the management dashboard.
4. From here, familiarize yourself with the various features in the Admin Portal so you can effectively manage your candidates' progress and performance. On the left-hand side of the dashboard, you will find sections for **Users** and **Reports** which this guide will explain.



When a user clicks **Admin Portal**, they will be taken to the **Admin Portal**. Once there, clicking **My Training** will return to the Student Portal. In the **Admin Portal** there will be menu options to access the Users and Reports modules.

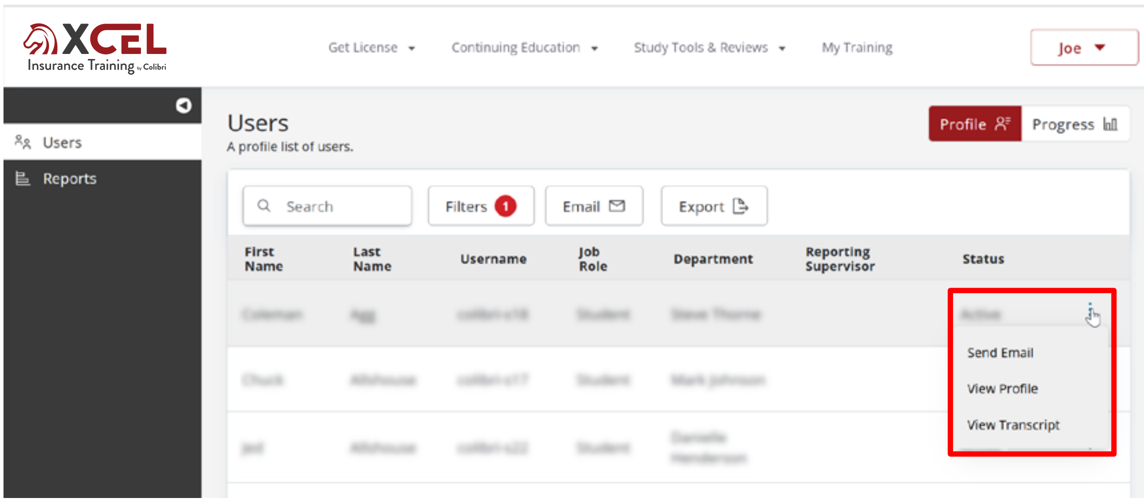


USER MANAGEMENT

The Users module is designed to easily conduct day-to-day tasks. Each level of administrators and managers in your organization will have access to the information for users that fall beneath them.

Quick Links

As an admin, you can access some administrative actions for each record in the **Users table**. These have been pulled out into the **Quick Links** menu shown below.On the far right of each user, you'll see 3 dots. Click this to open the **Quick Links** menu.



The Quick Links menu allows you to admin to send the user an email, view their profile, and also view their transcript.

Locate Users

The search and the filter will work in combination to assist in locating the desired users. The users return based on the search and filter will be the users that will be selected for emailing and exporting information.

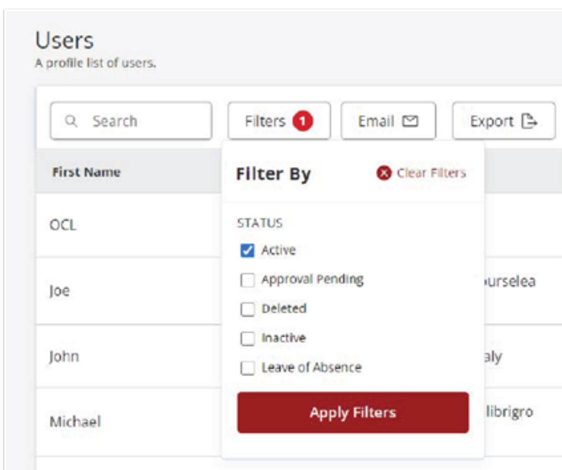
Search for Users

The search will be conducted across the following fields: First Name, Last Name, Username.

Filter for Users

The filter will default to User Status = Active and the count of filters selected will appear on the Filters button. Once the filter panel is open the available filters will display. From this view you can select other filters and apply them or clear all filters. To close the filter panel without changing the filters, click the Filters button.

1. Click **Filters** to open the **Filter By** panel
2. There are two sections, Status and Progress
3. To apply filters
   a. Within each section the options are single-select, but you can select an option from each section
      i. For example, search for all active new users
   b. Select the desired filters
   c. Click **Apply Filter**
4. Click Clear Filters to clear all filters and close the panel
5. To close the panel without changing the filters, click the **Filters** button



Email Users

The ability to email multiple users at once is available and will send emails to the users returned in a search and/or filter. There is also the ability to cc yourself as the sender of the email. This provides a copy of this email in your inbox for your records.

A user must have a valid email in their profile to receive the message in their Outlook, Gmail, etc. Though, all recipients of the email will receive the message in their Student Portal Inbox.

Export Users

The ability to export data for multiple users at once is available and will return data on the users returned in a search and/or filter. There are two exports that are available that will provide easy and immediate access to transcript level information on your users. Currently both reports are available in .csv format.

Export Transcript Details Fields

The Transcript Details export is very similar to the student transcript with a few additional fields.

EXPORT TRANSCRIPT DETAILS	Format
Name	Last Name, First Name
Username	
Email	
User Status	
First Name	
Last Name	
Employee Number	
Location	
Job Role	
Reporting Supervisor	
Training Program Name	
Training Program Due Date	Date
Traingin Program End Date	Date
Course Name	
Passed	
Attempted	Date
Completed	Date

EXPORT TRANSCRIPT DETAILS	Format
Name	Last Name, First Name
Time In	
Course Type	
Started	Date
Credit	
Course Score	
Course Progress	Percent Complete
Course Due Date	Date

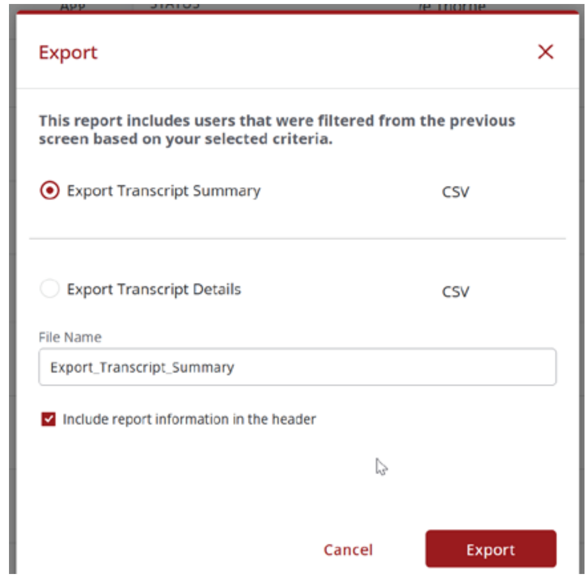
Export Transcript Summary Fields

The transcript summary export provides a summary of the progress in their active assignments.

EXPORT TRANSCRIPT DETAILS	Format
First Name	
Last Name	
Username	
Employee Number	
Email	
NMLS Number	
Supervisor	Reporting Supervisor
Status	
Last Login	
Total	Total active assignments – training assigned to the user and today's date is between the Start and End Dates
Completed	Number of Active Assignments that are completed
In Progress	Number of Active Assignments that are in progress
Not Started	Number of Active Assignments that are not started
Past Due	Number of Active Assignments that have passed the Due Date but not the End Date
Due Soon	Number of Active Assignments that are due within 30 days

Export

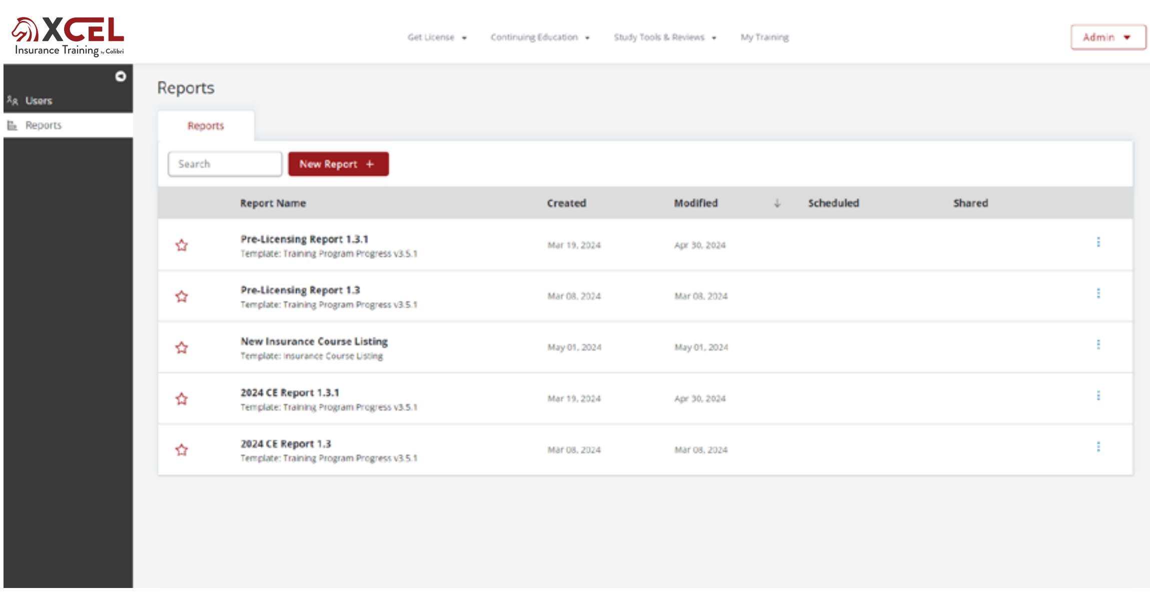
1. Search and/or filter for the desired users
2. In the **Export** modal
    a. Select the desired report
    b. Edit the **File Name** if desired
    c. Select if you want to return the report information (search and filter data) in the header
    d. Click **Export** to generate the report based on your browser settings
    e. Note: Due to the potential size of an export, the file is provided as a .zip file. Also, the Export Transcript Details file will not automatically download - you must click the link once alerted that the file is ready to download.
    f. To close the modal without an export, click **Cancel**



REPORTING

The Reports module is designed to allow managers to create, view, share and schedule reports based on the Users that fall beneath them.

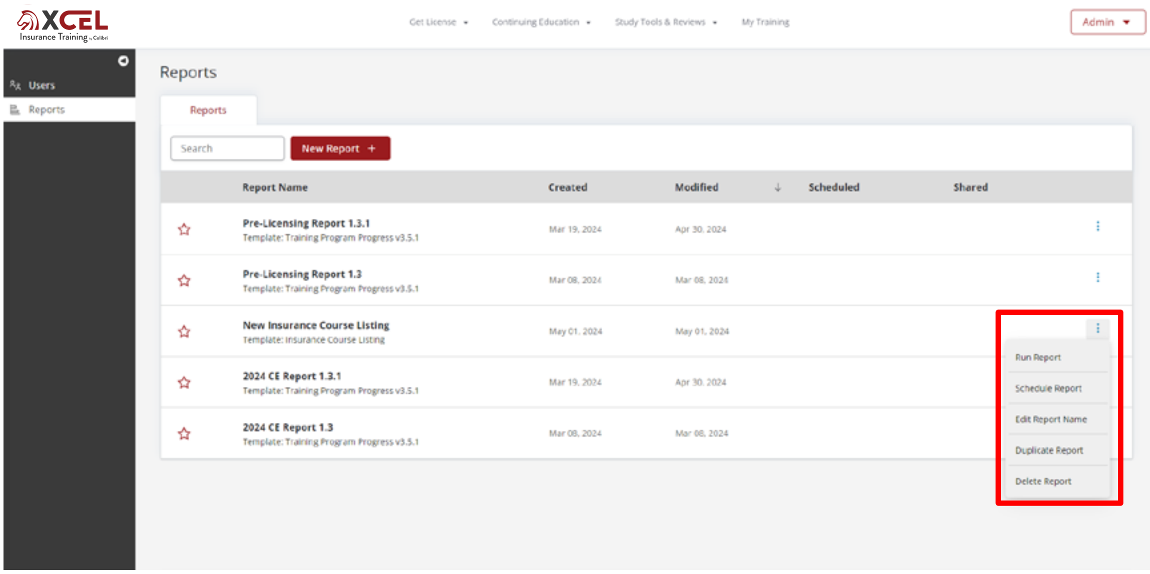
Any existing, saved reports will display here and you may favorite your most important reports.



Quick Links

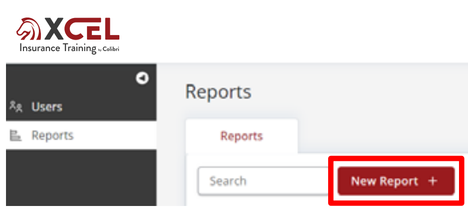
There are actions that are available for Reports that are available in the **Quick Links** menu when viewing the **Reports table**. On the far right of each report, you'll see 3 dots. Click this to open the **Quick Links** menu.

The Quick Links menu allows an admin to run report, schedule report, edit report name, duplicate report or delete report.



Creating a New Report

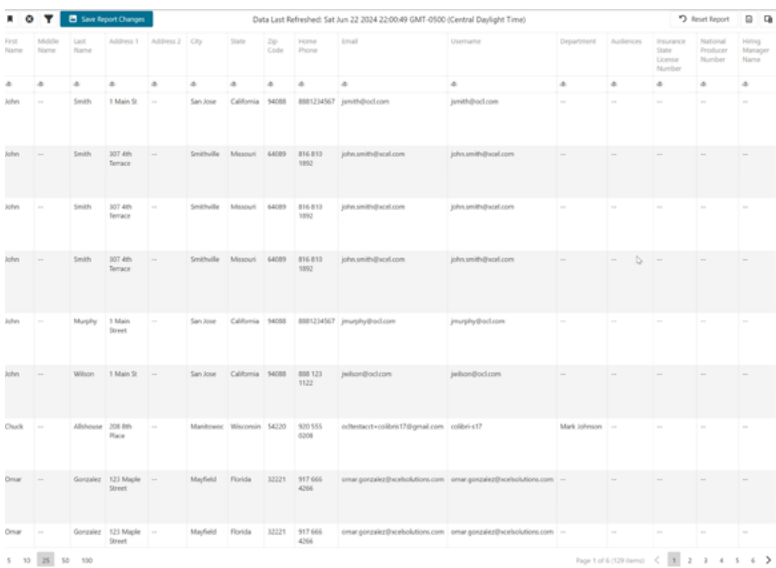
1. Click **New Reports** button.
2. Here you will have you access to two Report Templates to select from to begin customizing. Select either Insurance Course Listing or Insurance Lesson Summary and click Next.
3. Give your report a custom name under the New Report Name field, and click Save or Save & Run.
    - Save will save any edits made thus far and close out so you may run it later.
    - Save & Run will open our Report Viewer and begin generating the report.



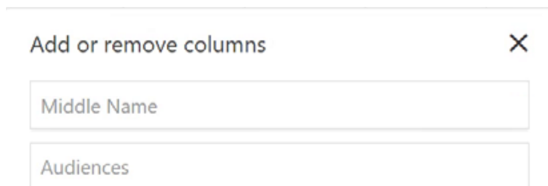
Customizing a Report

Customizing a report allows you to configure a Report Template into the exact information you wish you review. Once your desired filter criteria and output columns are configured, you can save those changes so you only have to configure the report once. You may create multiple custom reports from the same template which can be tailored to a specific set of data you wish to review.

1. Select a report by clicking on the report or select **Run Report** in the Quick Menu. If you are continuing on from the previous section, click the **Save & Run** option.
2. In the Report Viewer, you can do the following functions following left to right at the top:
    - View Applied Filter
    - Clear Filters
    - Filter Results
    - Save Report Changes
    - Export Report Data via the icon in the top right corner
    - Add or Remove Columns via the icon in the top right corner



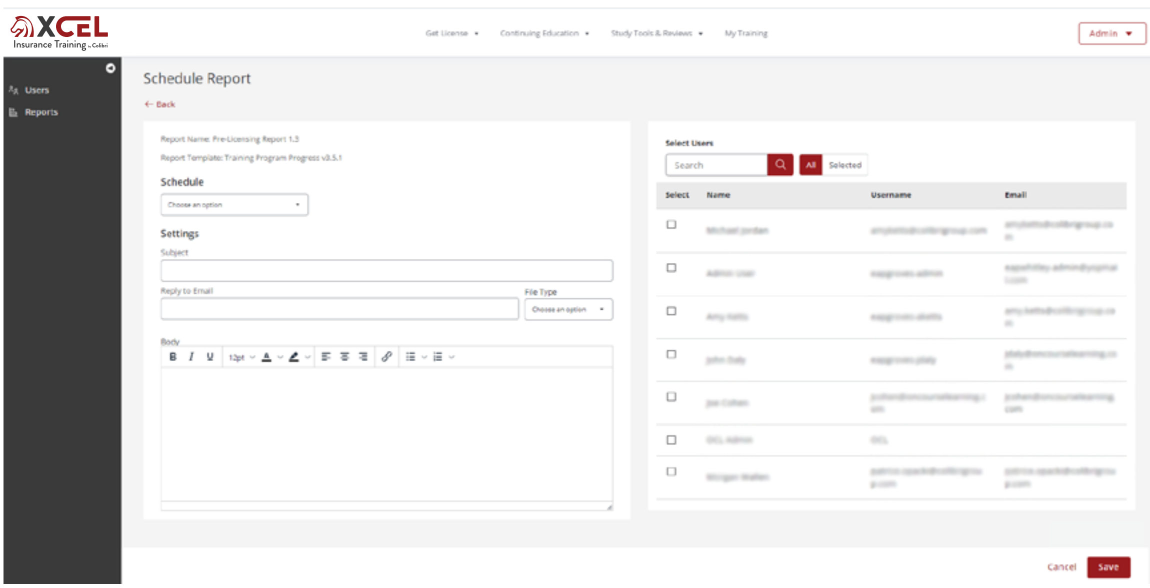
3. To begin customizing the report to see the metrics that matter most to you, you can:
    a. Reorder Columns by the drag-and-drop feature
    b. Remove any unnecessary columns by opening the 'Add Remove' columns dialog using the button in the top right corner and draffing the desired column to/from the panel that opens.
    c. Filter by utilizing the top left icon or clicking into the field under the column header. Some filtering options include:
        - Enrollment Date
        - Completion Date
        - Percentage Completed
        - Final Exam Score
        - First Name
        - Last Name
        - Email
        - Status



4. You may sort the data by clicking on any column header.
5. You can verify any filters on the report by clicking the **View Applied Filter** icon in the top left corner.
6. Once done customizing the report to meet your needs, click **Save Report Changes** and close out

Scheduling a Report

1. Find the report you'd like to schedule automatic emails for and select **Schedule Report** in the Quick Menu.
2. Choose the frequency you'd like to receive this emailed report under **Schedule**.
3. Begin entering the email information settings by providing a **Subject** Line, confirming the **Reply To Email**, selecting a **File Type**, and entering email **Body** copy.
   a. Note: this information will be visible to all Users you select to receive the report
4. Select Users you wish to receive this Scheduled Report. You may search for specific users, select individually or select all.
5. Review your information and click **Save**.



STILL HAVE QUESTIONS?

For answers to common questions, visit our Customer Support page. You can also reach our support team at **866-559-9235** Monday – Friday 8am-7pm EST or via email at **clientservices@xcelsolutions.com.**