MANAGING USERS 2023-08-20

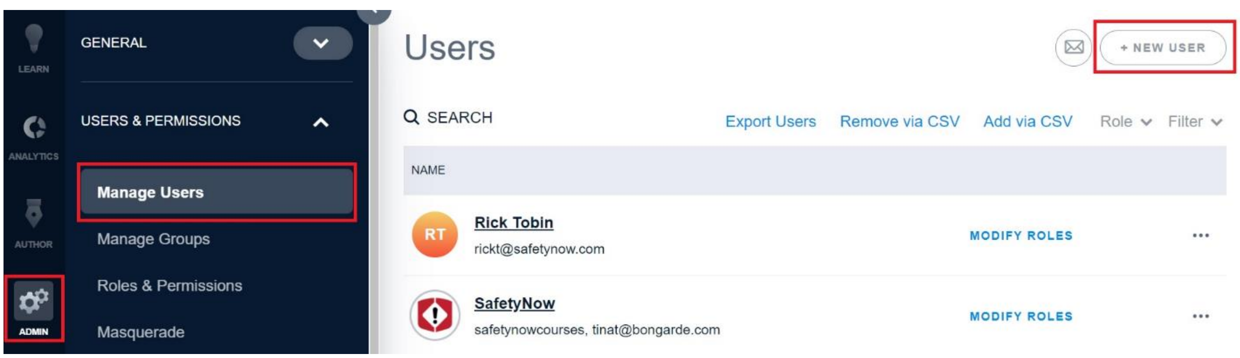
This "How-To" PDF Guide will assist you in learning to add new users in the SafetyNow LMS eLearning platform, supported by Bridge & Bongarde/SafetyNow, in partnership with Texas Mutual Insurance. To view the full How-To video, please visit [https://texasmutualstg.wpengine.com/texas-mutual-help/].

Adding/Removing New Users Individually or via CSV

As a user with "Administrator" permissions, you are in control of adding or removing users to your SafetyNow eLearning account. As indicated in this guide sub-title, users can be added to your account individually (one-by-one) or in bulk (via CSV). CSV is the abbreviated form of "Comma-separated values" which is a type of Excel file. The only file-format accepted for adding or removing users in bulk is a CSV. In this guide, we'll break down how to add/remove users on an individual level, and via CSV.

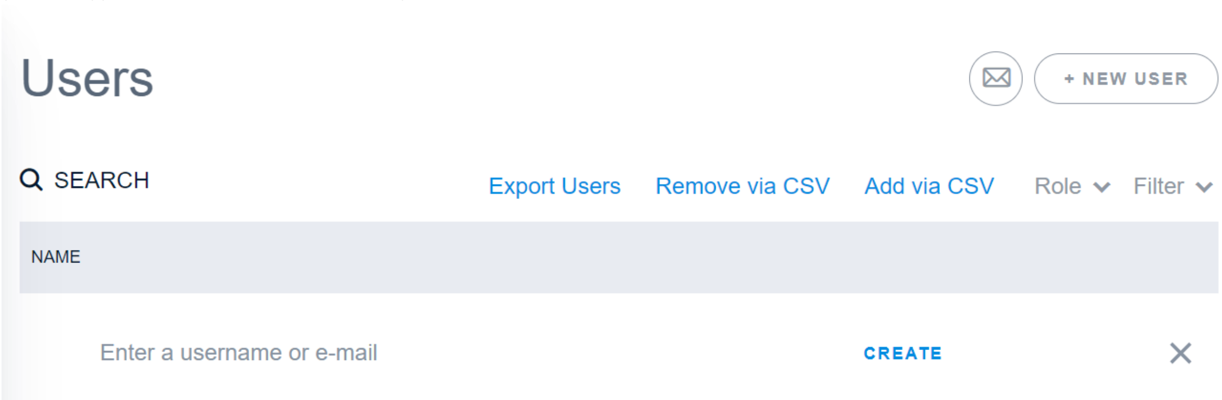
Adding Users Individually – Step 1:

Begin by navigating to the "Admin" tab. From here, select "Users & Permissions" to reach the full list of users. If this is the first time you are adding users to the account, you will likely only see your own existing user profile. (As an admin, you can still use your same user access to complete training. It is **not** recommended that you add an additional user profile for completion of training. Simply use your existing "admin" profile). From the top of this screen, select "+ New User" in the upper right portion of the page to begin.



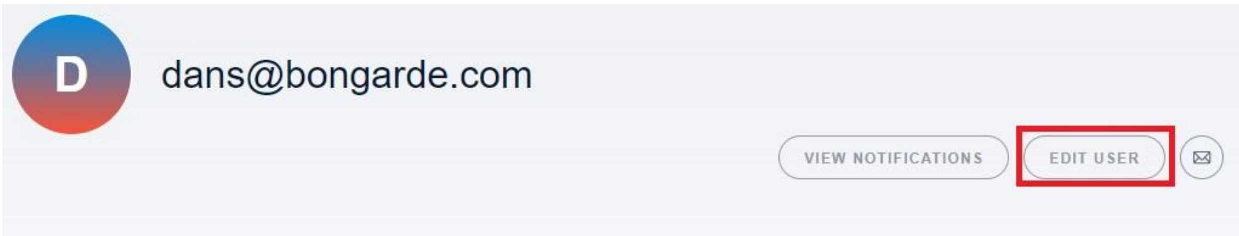
Step 2:

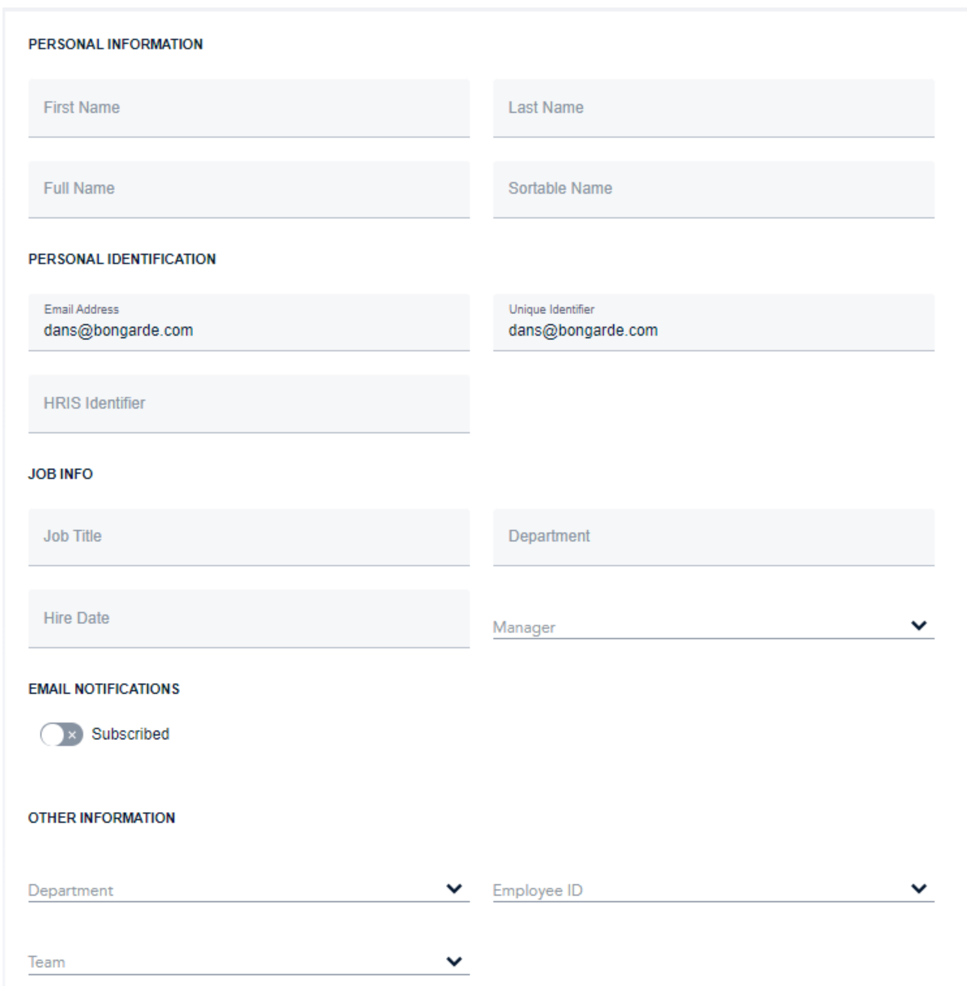
Once you have selected **"+ New User"**, you will be prompted to input a "username" or "email address". It is recommended that you input a user's first and last name for this initial step. Once this field is filled in, the user profile will be created, but the other fields within the user profile will not be populated yet. If we input an email address in this field, a "Welcome" email will be sent immediately, as the "Email" field will then be populated. Once you've typed in the user's full name, please hit "Create" and then select the user from the list of users below.



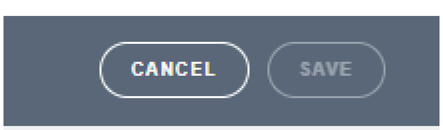
<u>Step 3 – Updating the User's Profile Information:</u>

Once you select the user from the list, you will see three options in the upper right portion of your screen: "View Notifications", "Edit User" and an envelope icon. Select "Edit User" to complete their profile information.



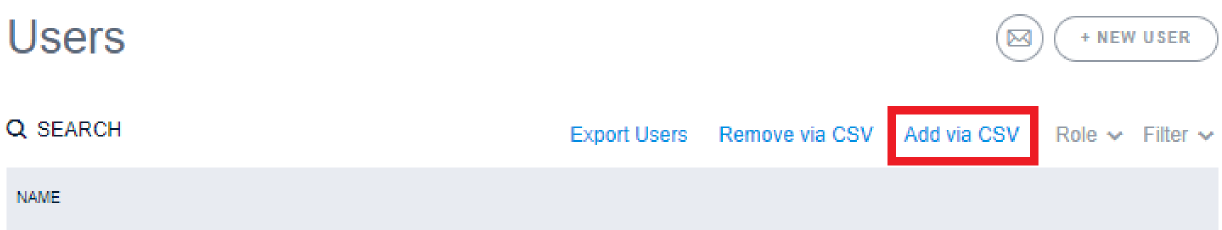


Populate all fields that you want to include. If the "Email Address" field is now populated, a "Welcome" email will be sent to the user, as soon as you hit "Save" in the upper right corner, as shown below.



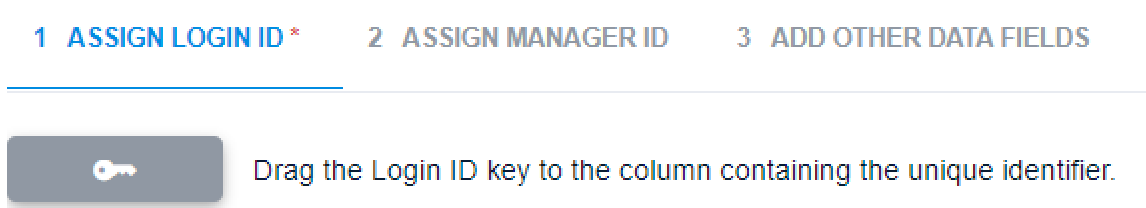
<u>Adding Users via CSV – Step 1:</u>

Adding users via CSV is the best method for uploading multiple users at one time. Create a CSV file, and ensure to include these columns at minimum: "Full Name", "Email Address", and "User Unique ID". The Unique ID is the most important field, as it is the unique identifier for each individual user. It also is used as the Login ID or Username. It is possible to set up a user profile without an email address, but there are certain manual steps that must be taken to assist those users with creating their password for login. From the "Users" screen, select "Add Via CSV" to begin.



<u>Step 2 – Uploading Your CSV File:</u>

To upload your CSV file, simply drag and drop the file in the designated space, or select "Choose a File" to launch your file explorer. Once the CSV has been added, the system will process the data and you'll proceed to a screen where you will "map the ID keys". For this next process, it is important that we map the appropriate fields to the matching columns from the CSV file. Remember, the most important field is the "Unique ID".



Drag and drop the grey key button shown above to the appropriate columns below. "Assign Login ID" is the only step that is "Required", marked by a red asterisk (*). All other fields are optional, but can be assigned during this process.

<u>Step 3 – Completing the Upload:</u>

Once the ID Keys have been mapped and assigned, select the "FINISH" button in the top right corner. The system will run one final check before the upload is completed. It is important to identify any errors that the system is detecting. If you are seeing any errors or encountering any issues, it is recommended that you do not complete the upload. Instead, cancel the upload and the CSV Import Log can be reviewed by your support team. Once a CSV upload has been done, it can be a lengthy and difficult process to rectify any problems arising from that upload's data and where the data is mapped to.

<u>Step 4 – Removing Users:</u>

To remove a user, simply navigate to the "Users" screen and select the "…" button to access the options drop-menu. From here, you can terminate a user, which will move them to the "Terminated" list. They can be restored at any time. Removing users via CSV works exactly as adding them, only the system will remove the users included on the CSV file. There will also be a step of mapping those ID keys, so the system can identify users by their Unique ID.