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Self-Assessment Tool

How-To Guide

How to add a user/learner

This guide is one in a series developed to support federation staff in using and delivering the Self-Assessment. Each guide focuses on a specific task or function. Whether you're new to the tool or seeking a refresher, our clear, step-by-step instructions will help you integrate the Self-Assessment seamlessly into your services and maximize its value for your member co-operatives.

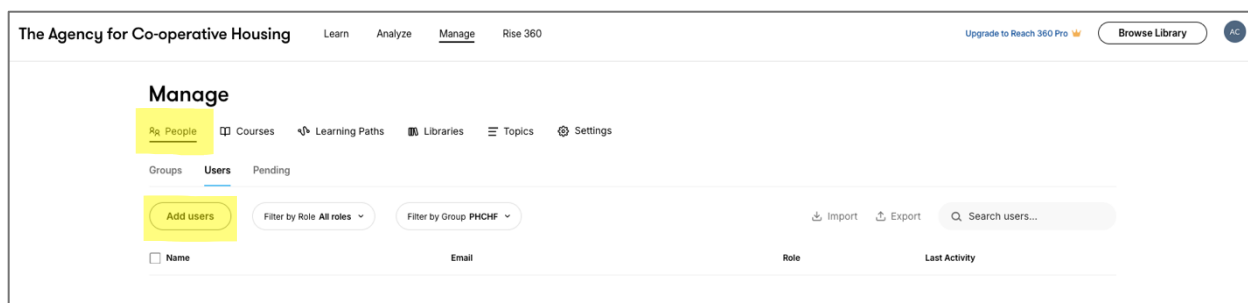
Step-by-Step Instructions

Group Manager must be logged in.

1. Goto the Manage screen.



2. Click on People & click on Add users





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3. Enter in the email address of the new user

Add users ✕

Invite users, assign their roles, and add to groups.

☐ Add all learners to 0 Groups ▾

Enter an email

4. Assign User role – should leave the default as Learner

Add users ✕

Invite users, assign their roles, and add to groups.

☒ Add all learners to 1 Group ▾

Enter an email

C

coop_person@greatcoo...

Learner ▾

0 Groups ▾

Admin
Full access to settings, learners, groups, and reports.

Manager
Manages learners and reports for assigned groups.

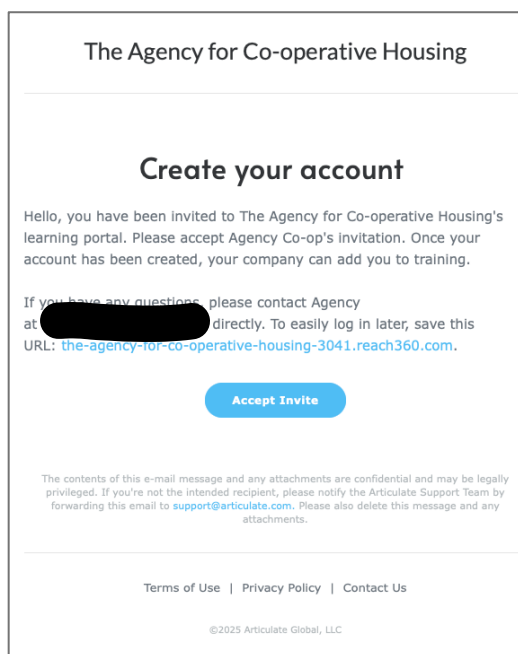
Reporter
Can access reports for assigned groups.

Learner
Default role to enable course access.

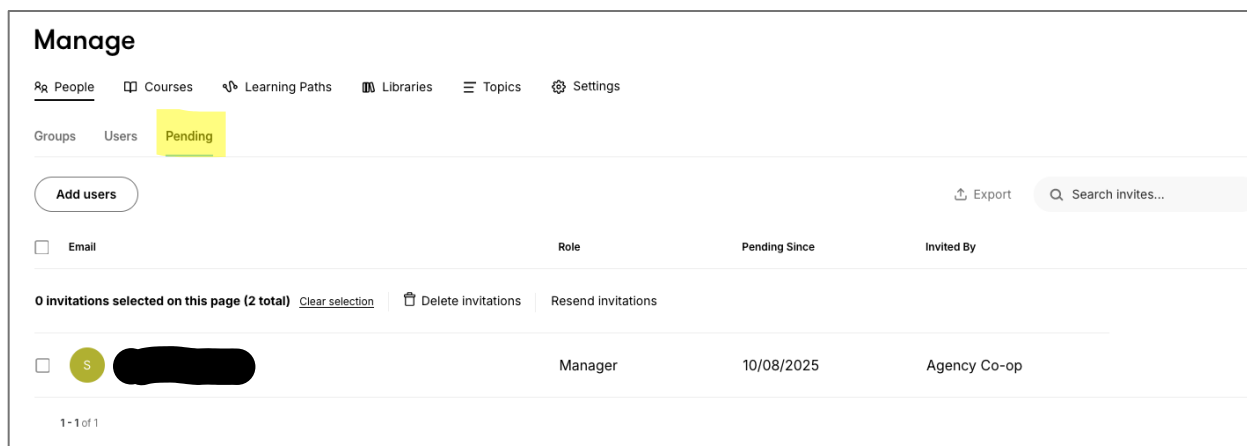
Cancel

Add 1 Person

- An email will be sent to the user to complete the process. The email will vary slightly based on the role assigned to the user.



- Click on Pending to view the status of the user invitations or resend an invitation.



- Once the user creates their account they will show up in the group.

Please contact Agency Support at helpdesk@agency.coop for more information.