Edvance360 **QUICKSTART GUIDE**

How to Use Supervisor Accounts

Supervisor Accounts Defined

Edvance360 provides accounts for oversight, in which users designated as ***Supervisors*** may track and report on Learner progress within the LMS, as well as approve any Offline Training submitted by their direct reports.

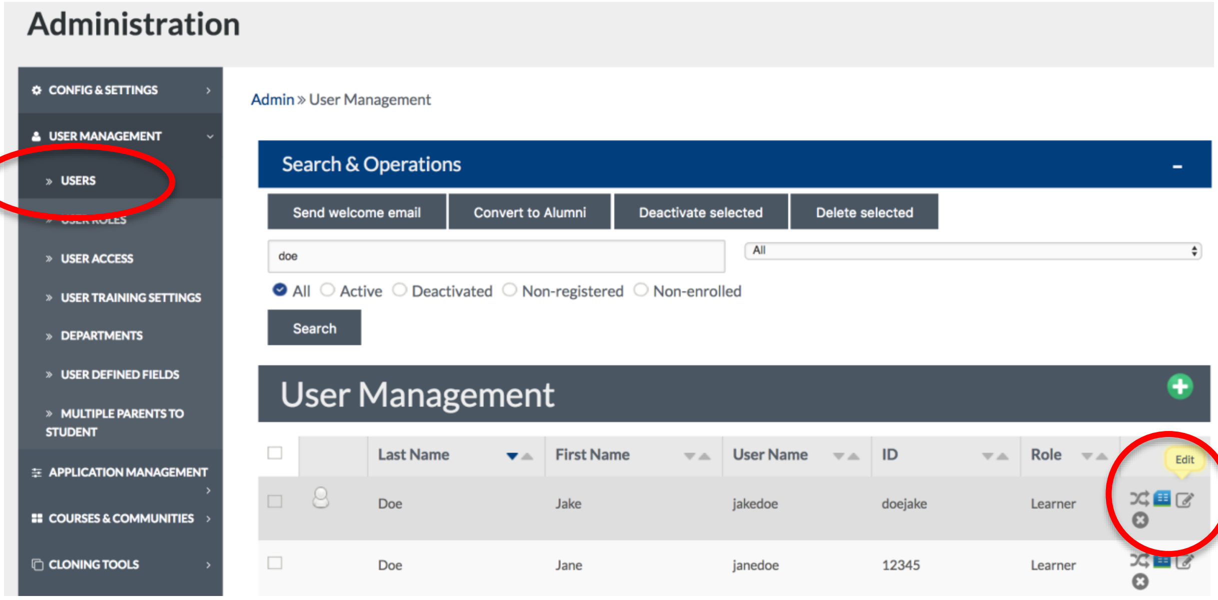
How to Setup Users as Supervisors

There are two ways in which users can be assigned a Supervisor within Edvance360. The first is to manually assign users to their Supervisors via the 'Edit User' screen. The second involves an import via a CSV file containing a field for a Parent/Supervisor ID - which auto assigns Supervisors to users in bulk. See directions for each option below.

Assigning Supervisors via the Edit User Screen

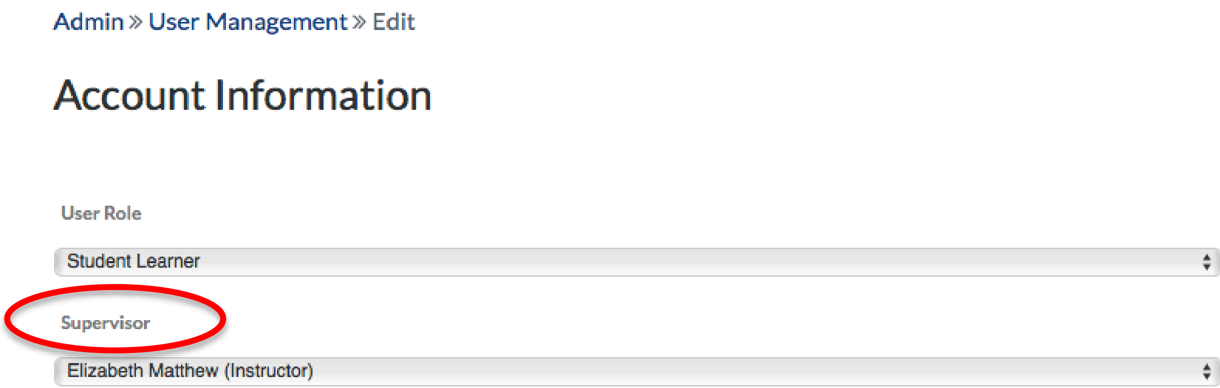
1 Navigate to **1-Admin Tab > 2-User Management > 3-Users**

2 Scroll down the list of users to find a Learner (user role is listed as the far right column of the User list), then select the Edit option (pencil icon) to be directed toward the User Edit Screen.

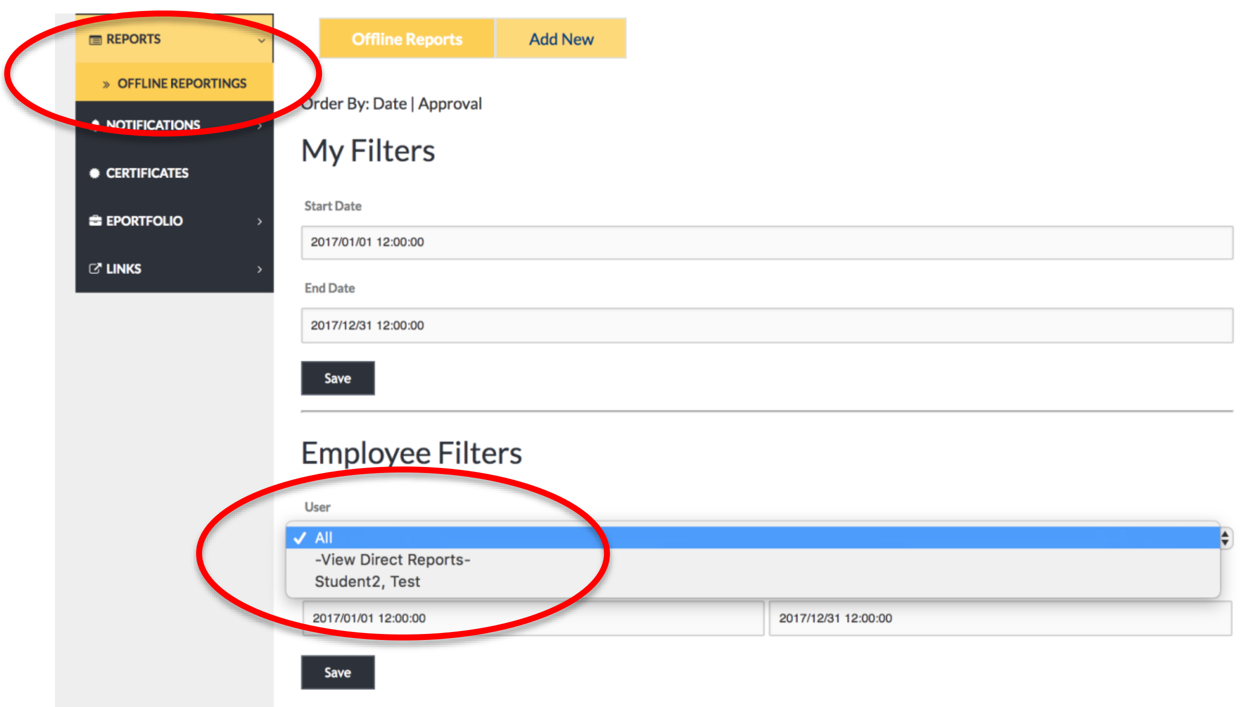


3 The second dropdown box will be entitled SUPERVISOR and can be extended to reveal a list of possible users to be assigned as a Supervisor to the user in which you are editing. NOTE: A Learner, Faculty/Staff, or an Admin user may be a Supervisor to another User. *The User Role is listed in parenthesis next to the User name that shows on the list.*

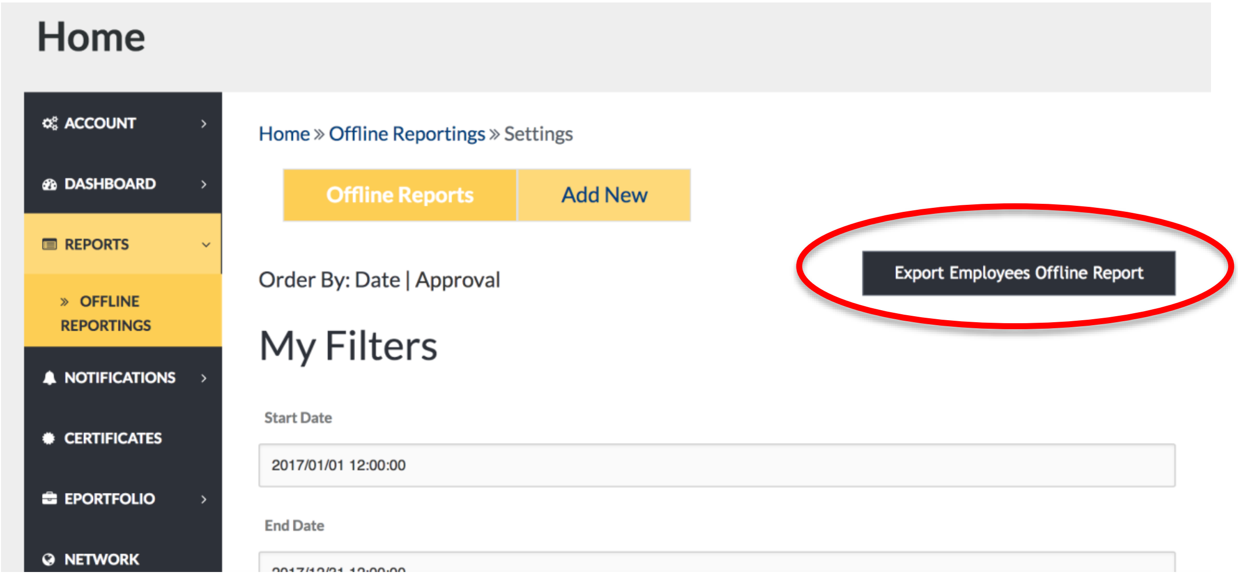
A Supervisor can be selected from the list, and then these settings, as well as any other that have been updated from the Edit User screen will need to be saved.



4 Once the assigned Supervisor logins, they will be able to select REPORTS>Offline Reporting from their Homepage Dashboard, and the list of their direct reports will appear. These reports are run **ON DEMAND** and can be organized via a variety of data points and filters.

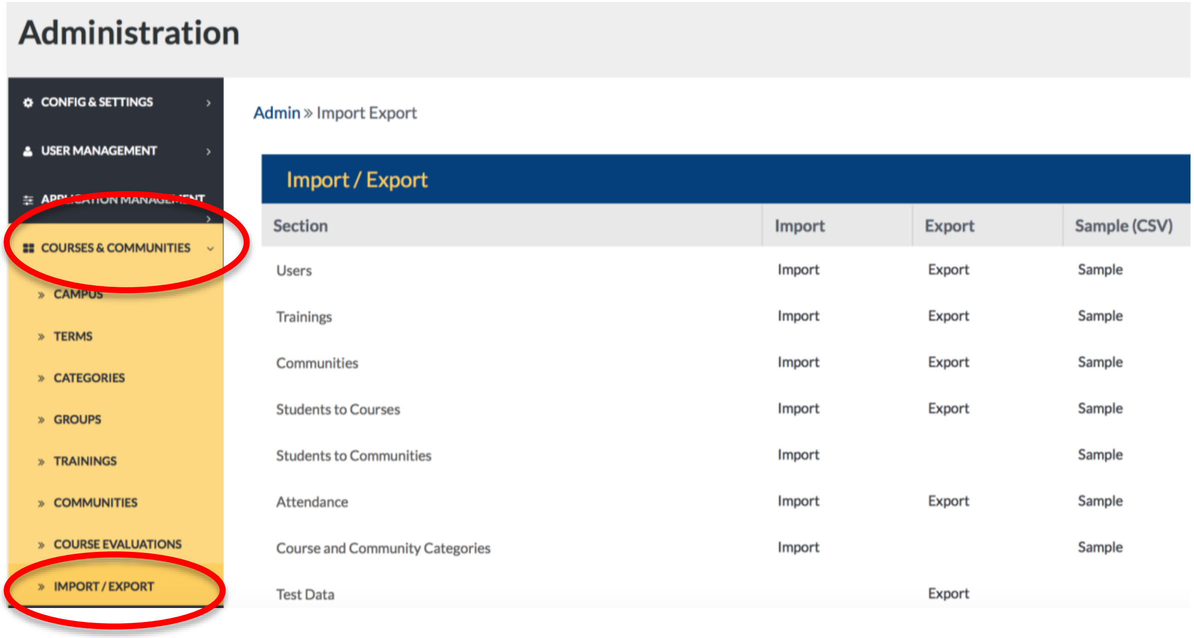


5 Once a report has been submitted via the Save tab, Supervisors may then scroll back to the top of their Offline Reporting Screen to “Export Offline Report” option.

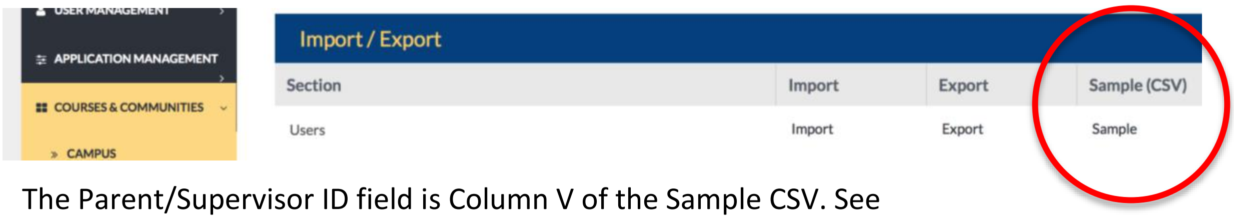


Assigning Supervisors via the Import User Function

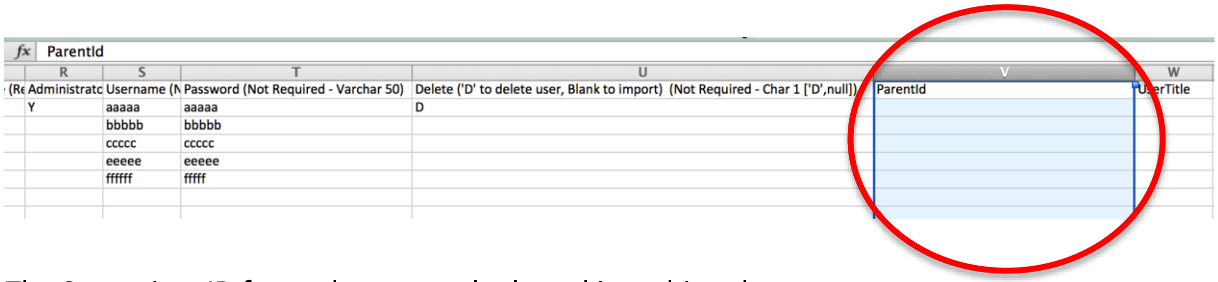
6 Navigate to **1-Admin Tab > 2-Courses & Communities > 3-Import/Export**



Admin Users will have the opportunity to download a copy of a Sample CSV file, which will show all allowed and included data points and fields for User Import by clicking **Sample.**



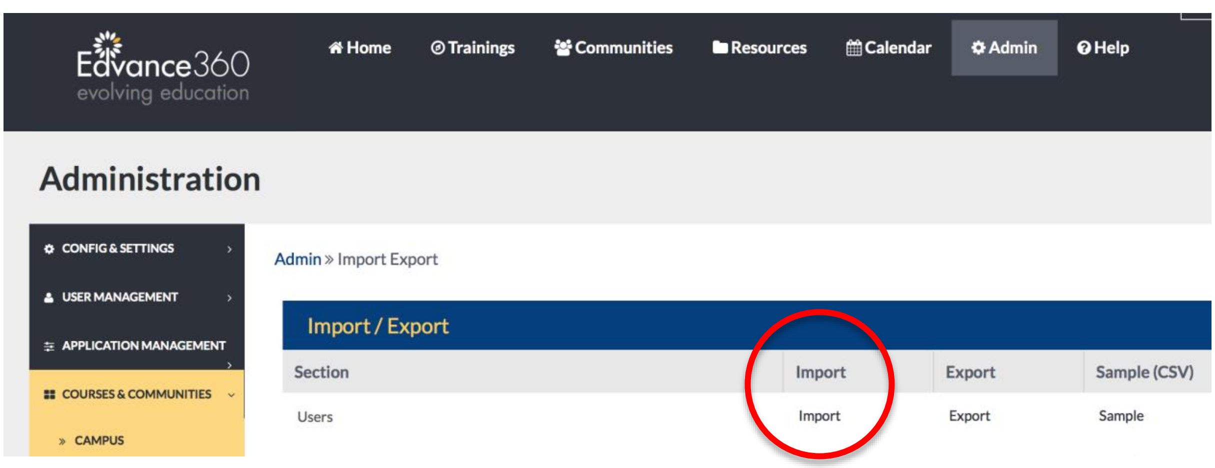
The Parent/Supervisor ID field is Column V of the Sample CSV. See Screenshot.



The Supervisor ID for each user can be keyed into this column.

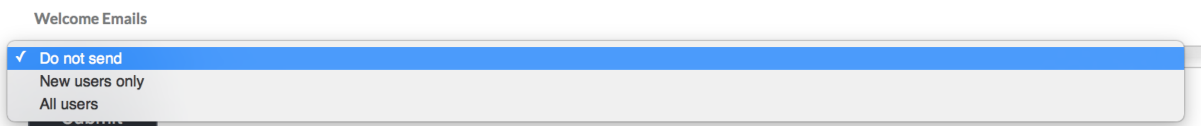
NOTE: The Supervisor will be listed as a user in the same table (or a previously uploaded table), so that Supervisor's USER ID will be the same ID listed in the Supervisor ID column for the users that need to be assigned to them (Column V).

7 Once Admins have created, edited, and saved their CSV file and are ready for import, the Import option can be selected to begin the process.



8 The Import feature will allow Admins to browse their computers for the saved CSV file, select it, and upload it.

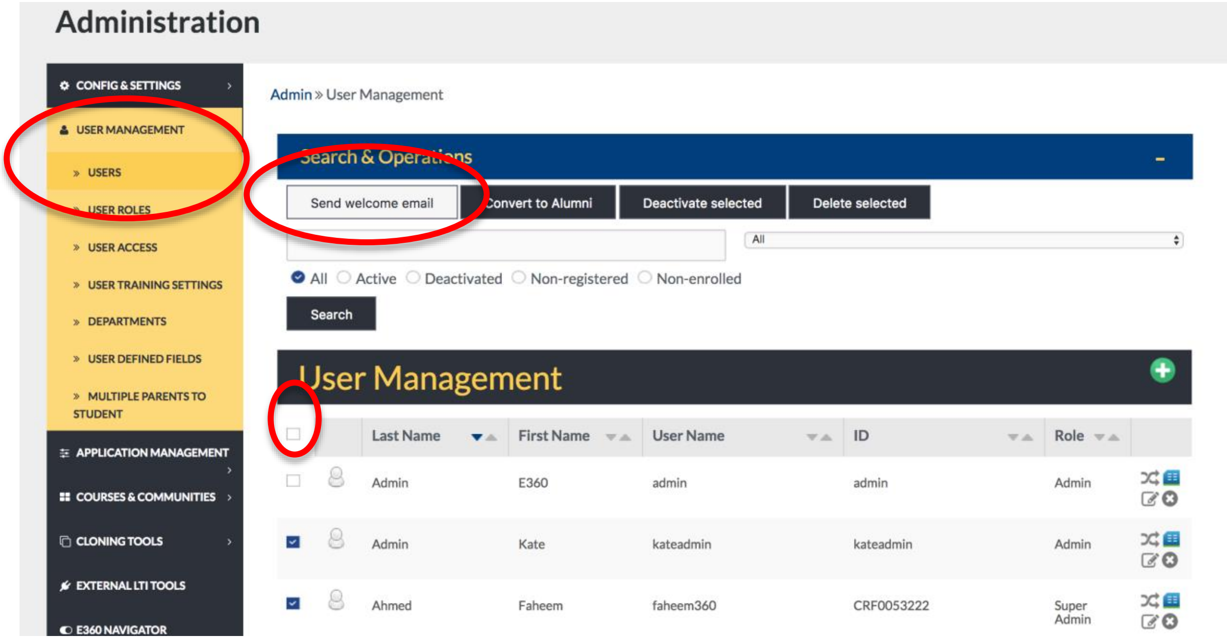
Before submitting, Admin users will have the option to automatically send a Welcome email to these newly imported users via the Welcome Email dropdown.



Once the CSV has been uploaded and the Welcome Email options have been selected, the import can be saved via the Submit button.

9 In order to see the list of newly imported Users, Admins can navigate to **1-Admin Tab > 2-User Management > 3-Users.**

If Welcome Emails were not selected to be sent automatically in the previous step, then Admins can select the name of each user they'd like to send this email to by manually checking the box next to the left of each User's name. See screenshot below.



10 From this screen, Admins may also select the Edit (pencil icon) to confirm that the Supervisor field pulled over the correct name from the Supervisor dropdown. See Steps 2 and 3 above for more detailed information.