



GreatAcademy® Quick Guide

GreatAcademy® Quick Guide

Contents

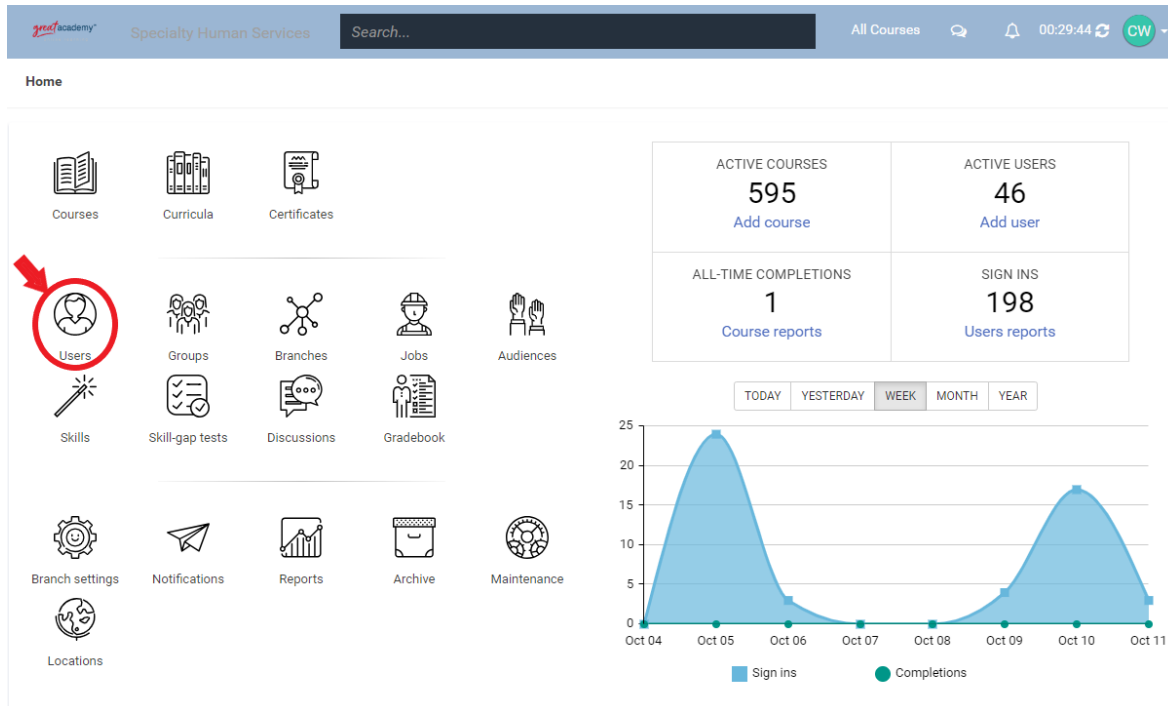
Adding Users to Your Portal	1
Mapping Accounts for Portal Admin and Instructors	6
Adding Branches	10
How to Add Courses	13
Setting Course Rules.....	18
How To Pull Reports.....	20

GreatAcademy® Quick Guide – Adding Users to Your Portal

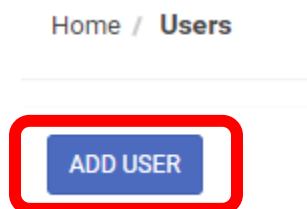
There are three main ways to add users to your system.

Add Users Individually

1. Add them individually by going to your Users icon.



2. Click **ADD USER**



3. Fill in user information:

- **First name** – User's first name.
- **Last name** – User's last name.
- **Username** – User's Username – It is advised to use the user's email address.
- **Password** – Enter any password.
- **Repeat Password** – Enter the same password as above.
- **Email Address** – User's email added.
- **Receive system emails** – This box should be checked so the user receives notifications.
- **User Type** – Select the user type: Instructor, Learner, Portal Administrator.
- **Branch** – This should typically be Specialty Human Services/"name of your organization".
- **Language** – Select language from drop-down.

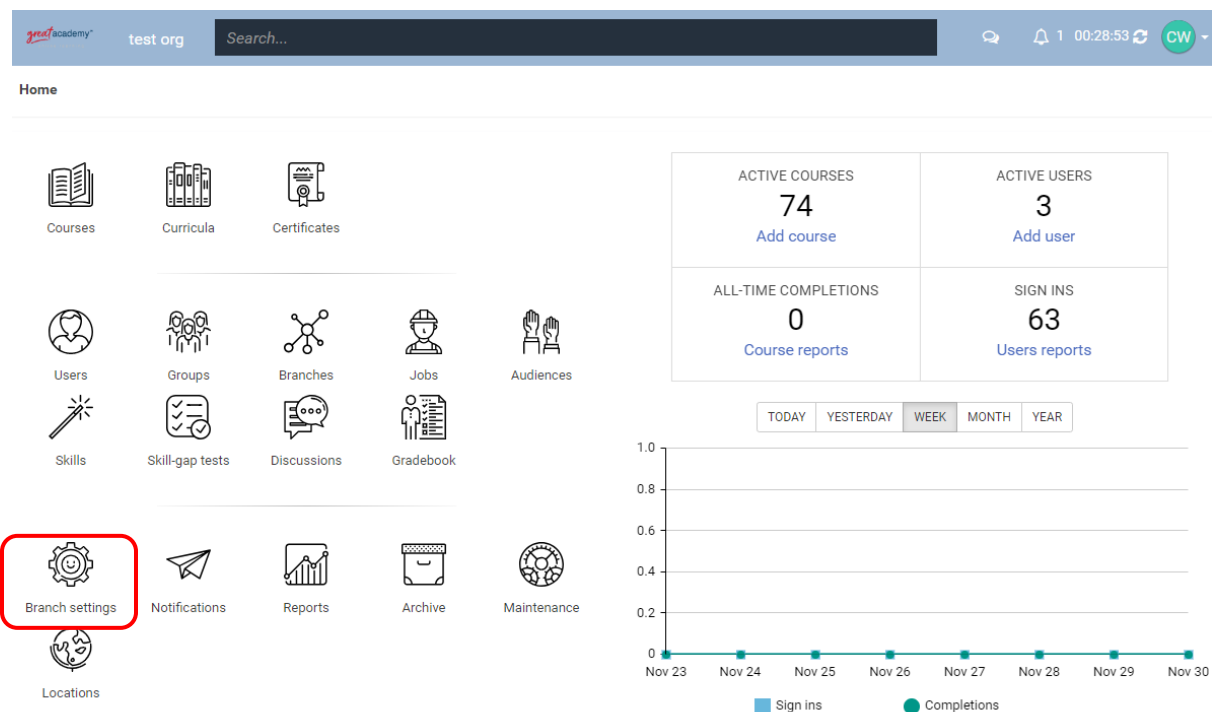
- **Time Zone** – Select preferred language from drop-down.
- **Active** – Box should be checked if the user needs to be active.
- **VolunteerMatters ID** – Nothing required, enter information if needed.
- **EmployeeID** - Nothing required, enter information if needed.
- **Volunteer or Employee** - Nothing required, enter information if needed.
- **Worker Type** - Not required, enter information if needed.
- **Branch** - Not required, enter information if needed.
- **Department** - Not required, enter information if needed.

ADD

4. Click **ADD** – at the bottom of the page.

Have Users Self Sign-Up

1. Select **BRANCH SETTINGS**.



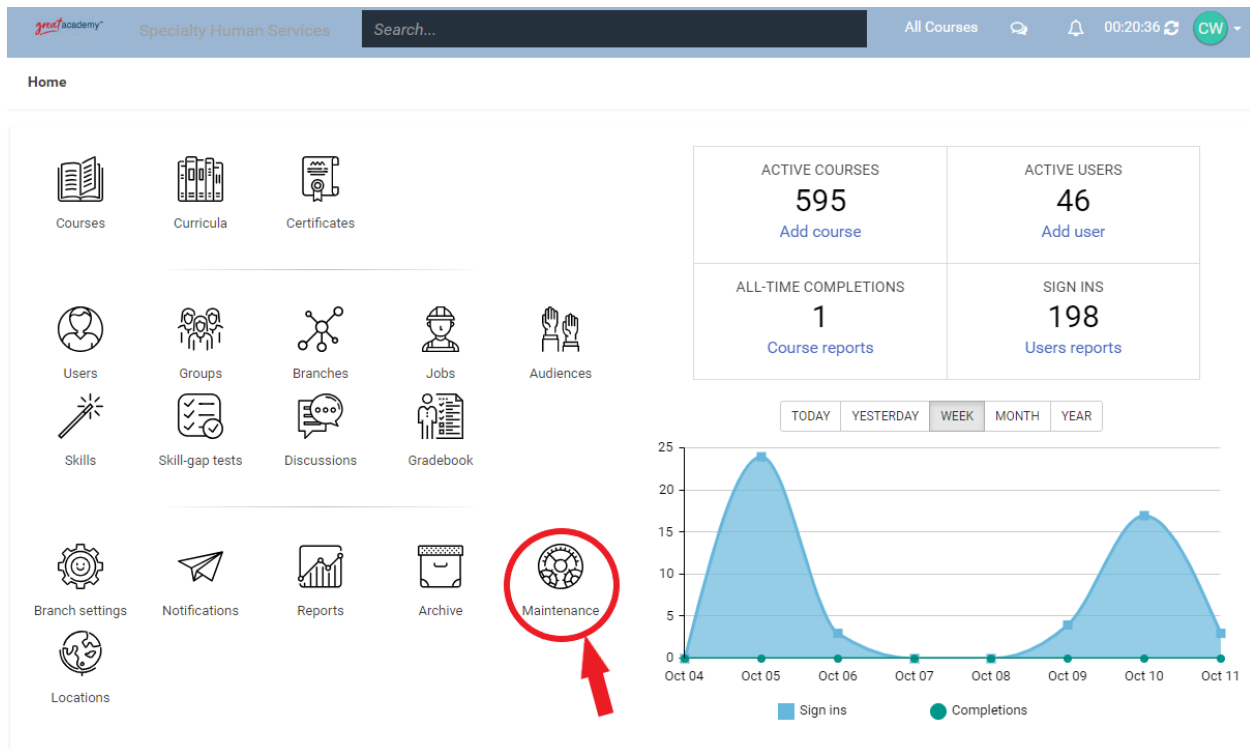
2. Select the **USERS** tab.

3. Under the **ALLOW SELF SIGNUP** dropdown, select how you would like to enable self signup and click **SAVE** at the bottom of the screen.
4. Share your URL out with those you would like to sign up for the system and instruct them to select **SIGN UP HERE!**

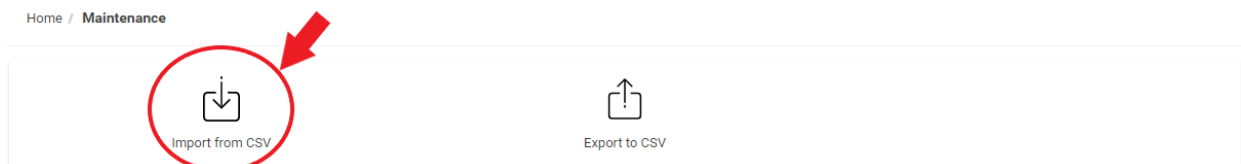
Home

Add Users In Bulk

1. Click the **MAINTENANCE** button.



2. Click **IMPORT FROM CSV**.



3. Make sure the Data type **USERS** is selected from the dropdown menu.
4. In the **AVAILABLE FIELDS** section, note that the bolded fields are the required fields.
5. Click **DOWNLOAD EXAMPLE**.

IMPORT FROM CSV

Data type: Users

Available fields: active, balance, branch_name, branch_public_id, email, is_idap, language, **login_name**, need_pwd_change, password, public_id, receive_email, **surname**, timezone, user_type, viewed_license, branch, department, volunteermattersid, EmployeeID, VolunteerorEmployee, workertype

[Download example](#)

Duplicates: ☒ Ignore ☐ Replace

Date format: Y-m-d

☒ Suppress notifications

CSV file: No file chosen [...or click here to import using plain text](#)

Note: Maximum import size is 1000 lines

6. Fill in the CSV field required fields and any optional fields you would like to add, including the following:
 - **Login:** Also displayed sometimes as username
 - **Name:** First Name
 - **Surname:** Last Name
 - **Password**
 - **Email**
 - **Receive Emails:** 1 means users will receive system emails, such as their login credentials and when they are enrolled in a course. 0 means they will not receive any emails from the system.
 - **Active:** 1 means the user should be active in your system. 0 means the user will be inactive.
 - **User Type:** Choose from Learner, Instructor or Portal Administrator.
 - **Branch Name:** Sort the user in the appropriate sub-portal based on location, department, etc.
7. Adjust your **DUPLICATES** setting. **IGNORE** will mean that any fields you are using to update a user's status will not be ignored by the system. **REPLACE** will update an existing user's information.
8. Decide whether or not you want users to get system notifications from the import. Do you want the system to send their login credentials when you upload the list?
9. Choose the file you just created and select the **IMPORT** button.

IMPORT FROM CSV

Data type

Users

Available fields

active, balance, branch_name, branch_public_id, email, is_ldap, language, user_type, viewed_license, branch, department, volunteermattersid, Em
[Download example](#)

Duplicates

☒ Ignore ☐ Replace

Date format

Y-m-d

☒ Suppress notifications

CSV file

Choose File

No file chosen

...Or

Note: Maximum import size is 1000 lines

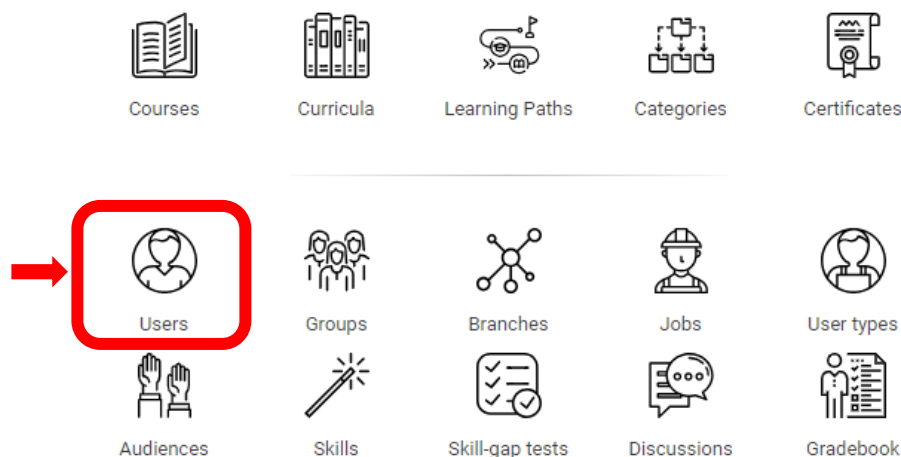
IMPORT

GreatAcademy® Quick Guide – Mapping Accounts for Portal Admin and Instructors

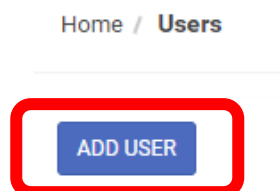
If you are a Portal Administrator or an Instructor, you will want to create a secondary Learner user account to get credit for any training you may need to take. This guide will show you how to create a second account and then map the two together so you can easily toggle between your profiles without having to log in separately.



1. Click the **USERS** Icon.



2. Click **ADD USER**.



- **First name** – User's first name.
- **Last name** – User's last name.
- **Username** – User's username – It is advised to use the user's email address. If you are making a Learner account, then you should add *learner* at the end. (ex. user@gaig.com – learner)
- **Password** – Enter any password.
- **Repeat Password** – Enter the same password as above.
- **Email Address** – User's email added. (NOTE: you can use the same email address for both your Admin account and your Learner account.)
- **Receive system emails** – This box should be checked so the user receives notifications.
- **User Type** – Select the user type: Instructor, Learner, Portal Administrator.
- **Branch** – This should be Specialty Human Services/"name of your organization".
- **Language** – Select language from the drop-down.
- **Time Zone** – Select preferred language from the drop-down.
- **Active** – Box should be checked if the user needs to be active.
- **VolunteerMatters ID** – Nothing required. Enter information if needed.
- **EmployeeID** - Nothing required. Enter information if needed.
- **Volunteer or Employee** - Nothing required. Enter information if needed.
- **Worker Type** - Not required. Enter information if needed.
- **Branch** - Not required. Enter information if needed.
- **Department** - Not required. Enter information if needed.

First name* e.g. John

Last name* e.g. Doe

Username* A username you wish to use

Password* Try to avoid simple passwords [GENERATE PASSWORD](#)

Repeat password* The same as above.

Email address e.g. jdoe@example.com

☒ Receive system emails

User type* Learner

Branch Select branch

Language English (US) [English (US)]

Time zone (UTC-05:00) America/New York

☒ Active

VolunteerMatters ID
Specialty Human Services

EmployeeID
Specialty Human Services

Volunteer or Employee
Specialty Human Services Employee

Worker Type
Specialty Human Services

Branch

Department

- Click **ADD** – at the bottom of the page

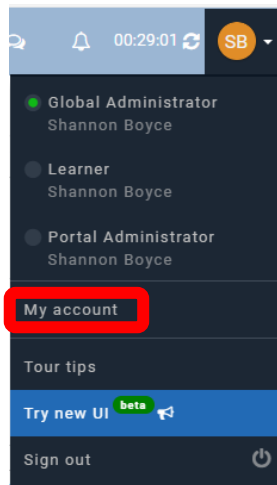
ADD

- To link the accounts:

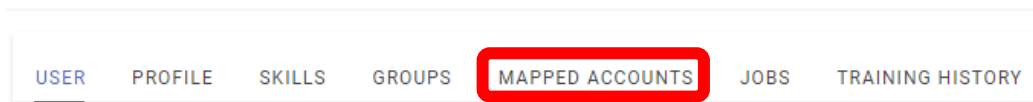
- Click the initials on the top right corner of the screen.



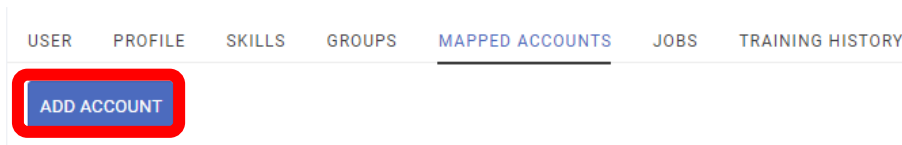
- Click **MY ACCOUNT**.



- Click **MAPPED ACCOUNTS**.



- Click **ADD ACCOUNT**.



- Enter the **Login** and **Password** for the account that needs to be mapped.
- Click **ADD**.

Login:

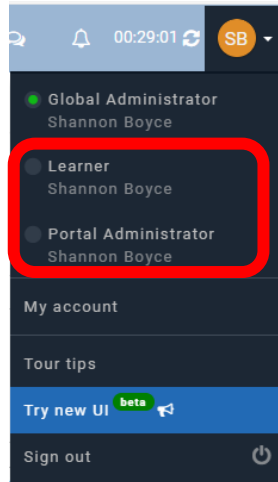
Password:

ADD

5. Click the initials on the top right corner of the screen.



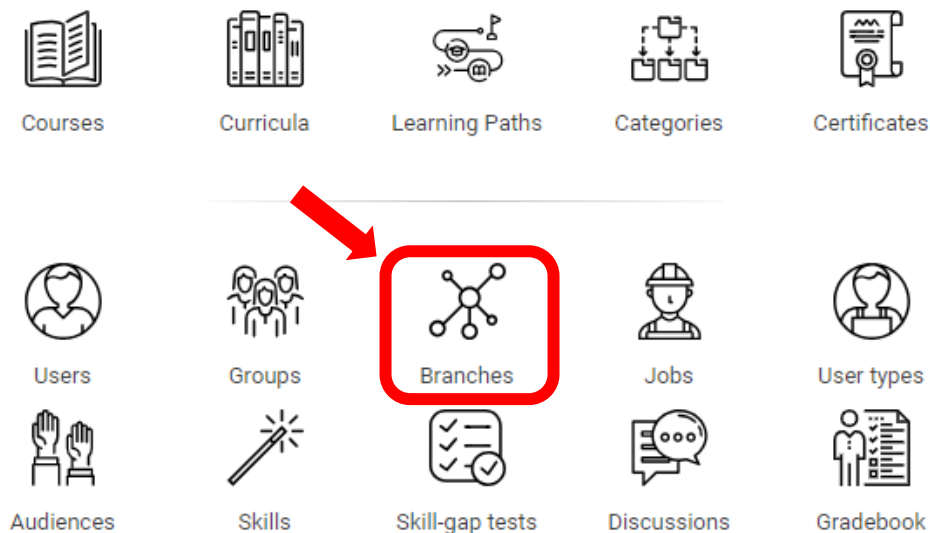
6. Both the Learner account and Portal Administrator account will be listed.



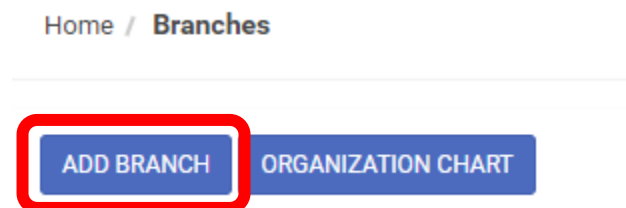
GreatAcademy® Quick Guide – Adding Branches

You can use branches to create sub-portals under your parent portal. This can be used to separate users by location, department, etc. to help with user management and reporting.

1. Click the **BRANCHES** Icon.



2. Click **ADD BRANCH**.



- **Name** – Name of Branch. (This is the only required field)
- **Parent Branch** – Select the name of main branch from drop down – This will be “Specialty Human Services/”name of your organization”. (should be the only option; should default)
- **Domain name for branch** – Needs to be left blank.
- **Product Division** – Needs to be left blank.
- **Product Classification** – Not required.
- **Policy/Customer #** – Not required.
- **Expiration Date** – Not required.

Name*

Parent branch

Domain name for branch

Product Division ⓘ

Product Classification

Policy/Customer #

Expiration Date

Required fields are marked with an asterisk (*).

ADD

3. Click **ADD** – at the bottom of the page.



- After clicking **ADD**, the **USERS** tab will appear.
- Assign users to the branch by clicking the **NO** to change it to **YES**.
 - Do this for each user that needs to be added to the branch.
- COURSES: Best Practice - Create all of your branches first where possible.
- Then you'll typically want to add all courses to all of your branches so you can properly report on any course users might take in any branch.
- To add all courses in a mass action to all your branches:

BRANCH

USERS

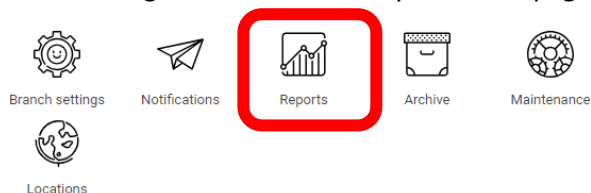
COURSES

CURRICULUMS

SETTINGS

User	User type	Branch	Assigned
Chelsea Wood	Global Administrator	Test	NO
Timothy Brewster	Global Administrator		NO
George Support	Global Administrator		NO

- First go to **REPORTS** from your Home page.



- Select the **COURSES** tab.

SYSTEM USERS **COURSES** CURRICULA TESTS SURVEYS SCORM CERTIFICATES TIMELINE

MASS ACTIONS FILTER

COURSES
73

COMPLETIONS
0
0 THIS WEEK

Created on

- Under the **MASS ACTIONS** dropdown, select **ADD TO BRANCH** and add All courses to each of your new Branches

ADD TO BRANCH (TOTAL 73) X

Branch

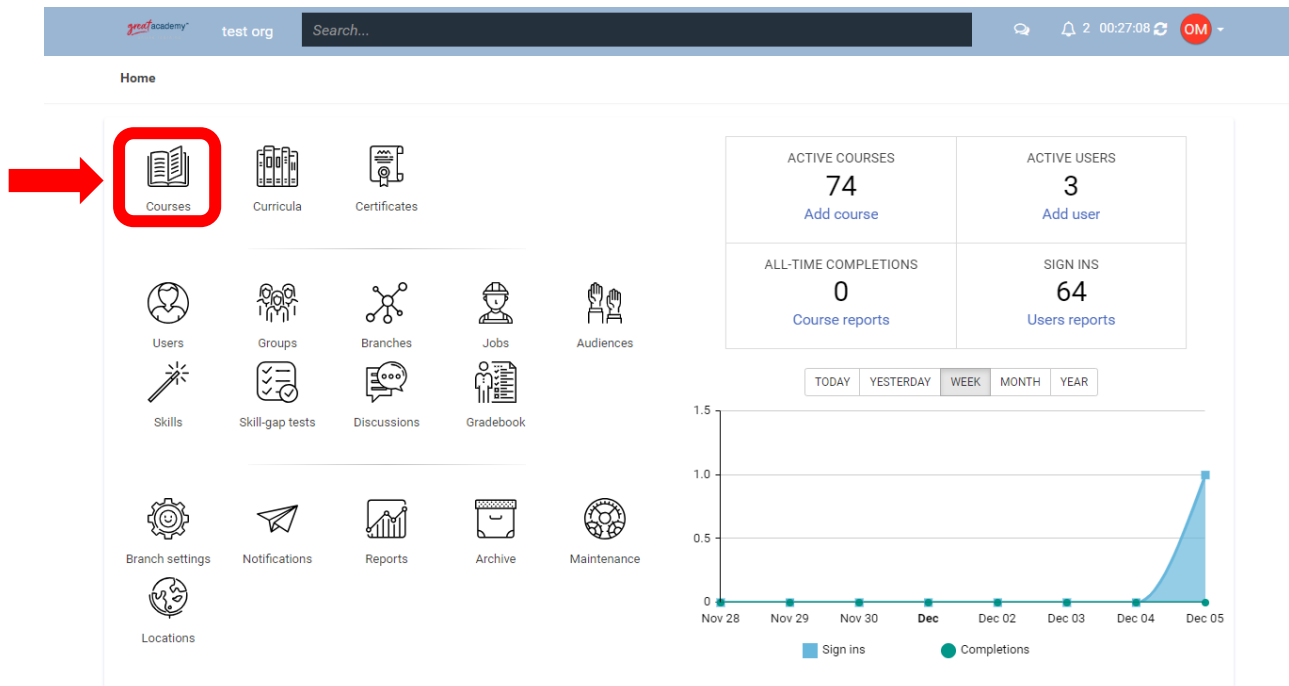
SUBMIT

- To add Curriculums to the branch, click the **CURRICULUMS** tab
 - Assign Curriculums to the branch by clicking the **NO** to change it to **YES**.
 - Do this for each Curriculum that needs to be added to the branch.

BRANCH	USERS	COURSES	CURRICULUMS	SETTINGS
Curriculum				Assigned
TEST-Plugin				<input type="button" value="NO"/>
Driver Safety: Distracted/Defensive Driving				<input type="button" value="NO"/>
Refresher: Child Abuse Prevention				<input type="button" value="NO"/>

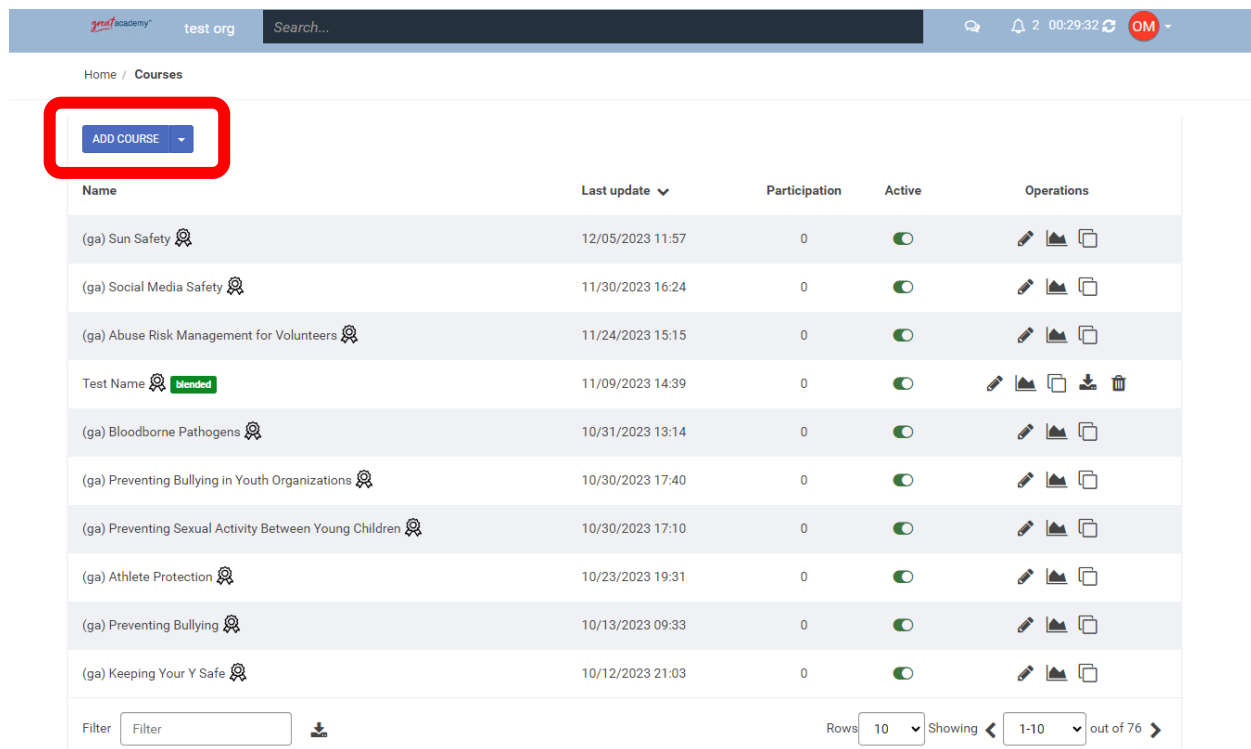
GreatAcademy® Quick Guide - How to Add Courses

1. From your Administrator portal, click on the **COURSES** icon.



The screenshot shows the GreatAcademy Administrator portal home page. The top navigation bar includes the GreatAcademy logo, the text 'test org', a search bar, and a user profile icon with the text '00:27:08' and 'OM'. The main content area is titled 'Home' and features a grid of icons for various functions: Courses (highlighted with a red arrow), Curricula, Certificates, Users, Groups, Branches, Jobs, Audiences, Skills, Skill-gap tests, Discussions, Gradebook, Branch settings, Notifications, Reports, Archive, and Locations. On the right side, there are four summary cards: 'ACTIVE COURSES' (74, Add course), 'ACTIVE USERS' (3, Add user), 'ALL-TIME COMPLETIONS' (0, Course reports), and 'SIGN INS' (64, Users reports). Below these cards is a line chart showing 'Sign ins' and 'Completions' over time, with a legend at the bottom.

2. Click **ADD COURSE**.



The screenshot shows the GreatAcademy Administrator portal 'Courses' page. The top navigation bar includes the GreatAcademy logo, the text 'test org', a search bar, and a user profile icon with the text '00:29:32' and 'OM'. The main content area is titled 'Home / Courses' and features a blue 'ADD COURSE' button in the top left corner. Below the button is a table listing courses with columns for Name, Last update, Participation, Active, and Operations. The table contains 10 rows of course data. At the bottom of the table, there is a filter input field, a download icon, and pagination controls showing '10' rows, 'Showing 1-10 out of 76'.

Name	Last update	Participation	Active	Operations
(ga) Sun Safety	12/05/2023 11:57	0	On	Edit, View, Copy
(ga) Social Media Safety	11/30/2023 16:24	0	On	Edit, View, Copy
(ga) Abuse Risk Management for Volunteers	11/24/2023 15:15	0	On	Edit, View, Copy
Test Name Blended	11/09/2023 14:39	0	On	Edit, View, Copy, Download, Delete
(ga) Bloodborne Pathogens	10/31/2023 13:14	0	On	Edit, View, Copy
(ga) Preventing Bullying in Youth Organizations	10/30/2023 17:40	0	On	Edit, View, Copy
(ga) Preventing Sexual Activity Between Young Children	10/30/2023 17:10	0	On	Edit, View, Copy
(ga) Athlete Protection	10/23/2023 19:31	0	On	Edit, View, Copy
(ga) Preventing Bullying	10/13/2023 09:33	0	On	Edit, View, Copy
(ga) Keeping Your Y Safe	10/12/2023 21:03	0	On	Edit, View, Copy

3. Fill out some information about your course, including the name and type of course. Click **SHOW ADVANCED SETTINGS** for some additional fields.

Course image

Name* e.g. How to be a programmer

Category Select category or type a new one

Type* eLearning

Short description

Show advanced settings

Required fields are marked with an asterisk (*).

ADD

4. In advanced settings, you can decide if you would like your course available for a certain number of days and if so, when it becomes available, and when it becomes unavailable. You can also choose your certificate, and whether it expires or not, if so, you can choose to reassign the course automatically.
5. Click **ADD**.

Language English (US) [English (US)]

Options ☒ Active ☒ Enable discussions ☒ Show on catalog

☐ Assignment requires approval ☐ Automatically assign to new users

Base price e.g. 15.50 €

Available for days

Upon expiration Prevent access unless completed

Available from With respect to your timezone

Available until With respect to your timezone

CEUs e.g. 10

Depends on Select courses

Certification Default template

Set duration Set expiration date

Duration 1 year Days Months Years Forever

☐ Reassign

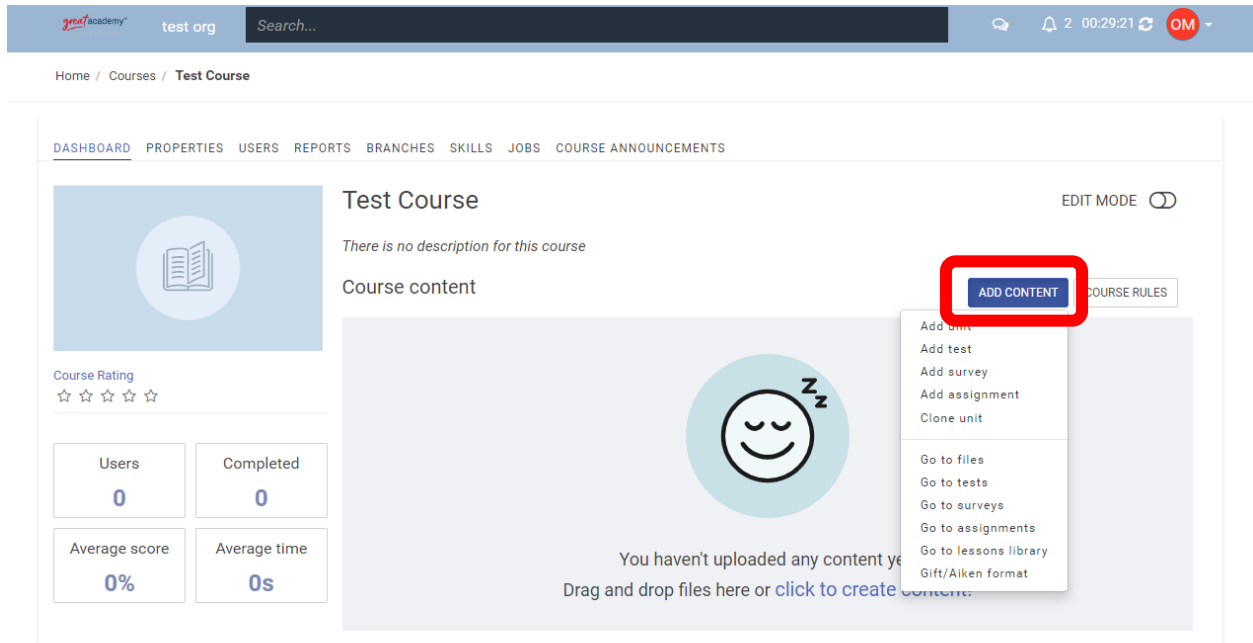
Recertification behaviour Renew existing

Provider

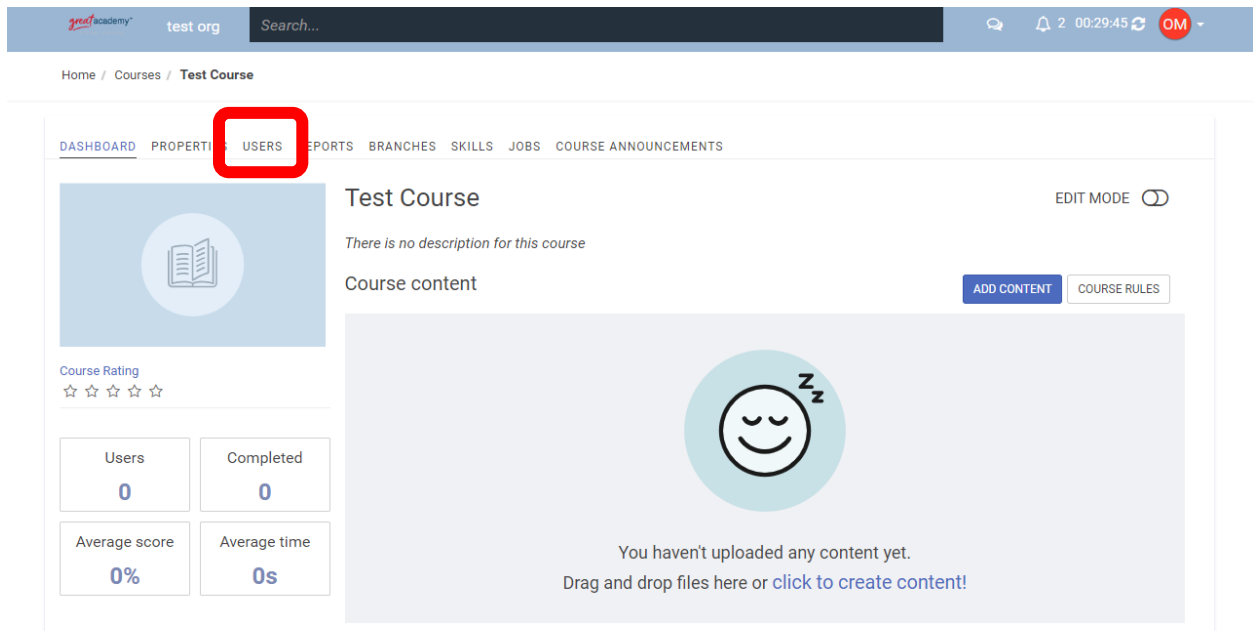
Required fields are marked with an asterisk (*).

ADD

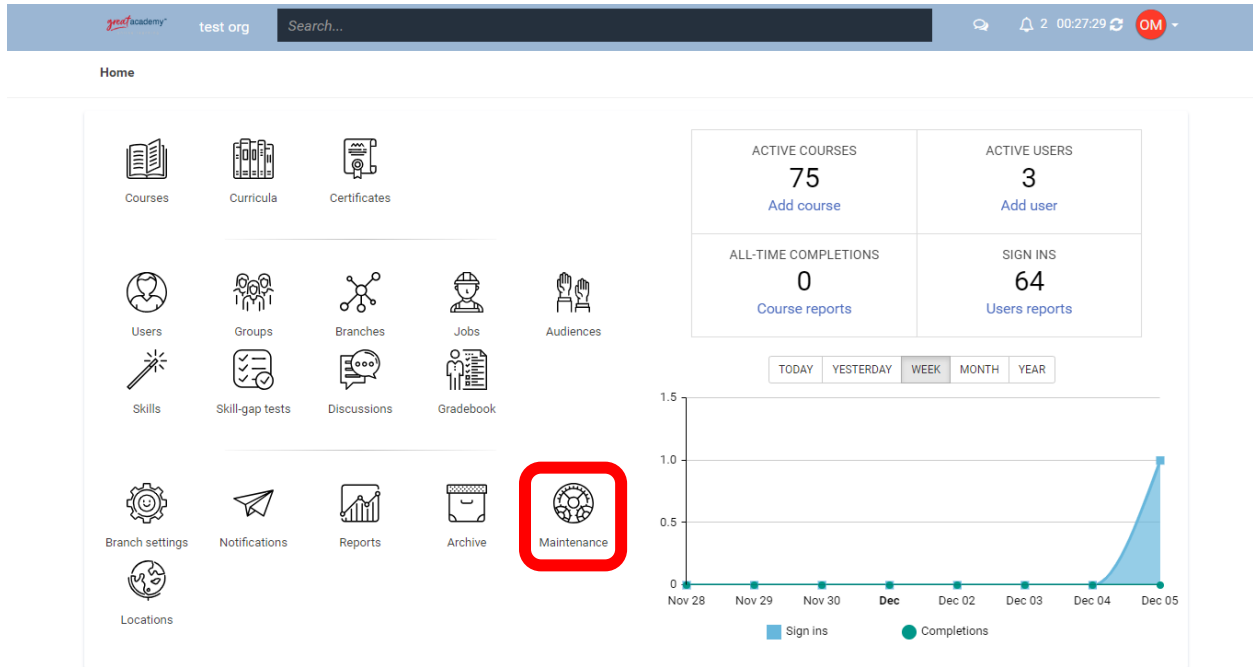
6. Drag and drop content or use the click to **CREATE CONTENT** button to begin creating your course. You can add units in the form of files, documents, PowerPoints, videos, voice recordings, links, tests, surveys, assignments and more.



7. You can enroll users in the course individually by clicking **USERS** and selecting those who you would like enrolled.



8. Users can also be enrolled in courses in bulk. This can be done by navigating to the **MAINTENANCE** icon and then clicking **IMPORT FROM CSV**.



9. Choose **COURSE ASSIGNMENTS** as your data type.
10. **DOWNLOAD EXAMPLE** file.

The screenshot shows the 'IMPORT FROM CSV' form in the Good Academy interface. The 'Data type' dropdown menu is set to 'Course assignments' and is highlighted with a red rectangle. Below this, the 'Available fields' section lists various fields: 'course_code', 'status', 'score', 'percentage', 'enrollment_date', and 'completion_date'. The 'Download example' link is highlighted with a red rectangle. The 'Duplicates' section has radio buttons for 'Ignore', 'Replace', and 'Merge', with 'Ignore' selected. The 'Date format' is set to 'm/d/Y'. The 'Suppress notifications' checkbox is checked. The 'CSV file' section has a 'Choose File' button and a note that the maximum import size is 1000 lines. An 'IMPORT' button is at the bottom.

11. Course Public ID can be found by going to the desired **COURSE -> PROPERTIES -> COPY**.

test org Search...

Home / Courses / Test Course / Properties

DASHBOARD PROPERTIES USERS REPORTS BRANCHES SKILLS JOBS COURSE ANNOUNCEMENTS

English (US) - Required

Course image

Name Test Course

Category Uncategorized

Type* eLearning

Short description

Show advanced settings

Required fields are marked with an asterisk (*).

UPDATE

12. Fill out desired fields, save as a CSV file, and import. You may choose to suppress notifications if you do not want users to receive an email letting them know they are enrolled in a course.

test org Search...

Home / Maintenance / Import from CSV

IMPORT FROM CSV

Data type Course assignments

Available fields login_course_public_id, course_code, status, score, percentage, enrollment_date, completion_date
[Download example](#)

Duplicates ☒ Ignore ☐ Replace ☐ Merge

Date format m/d/Y

☒ Suppress notifications

CSV file Choose File No file chosen ...or click here to import using plain text

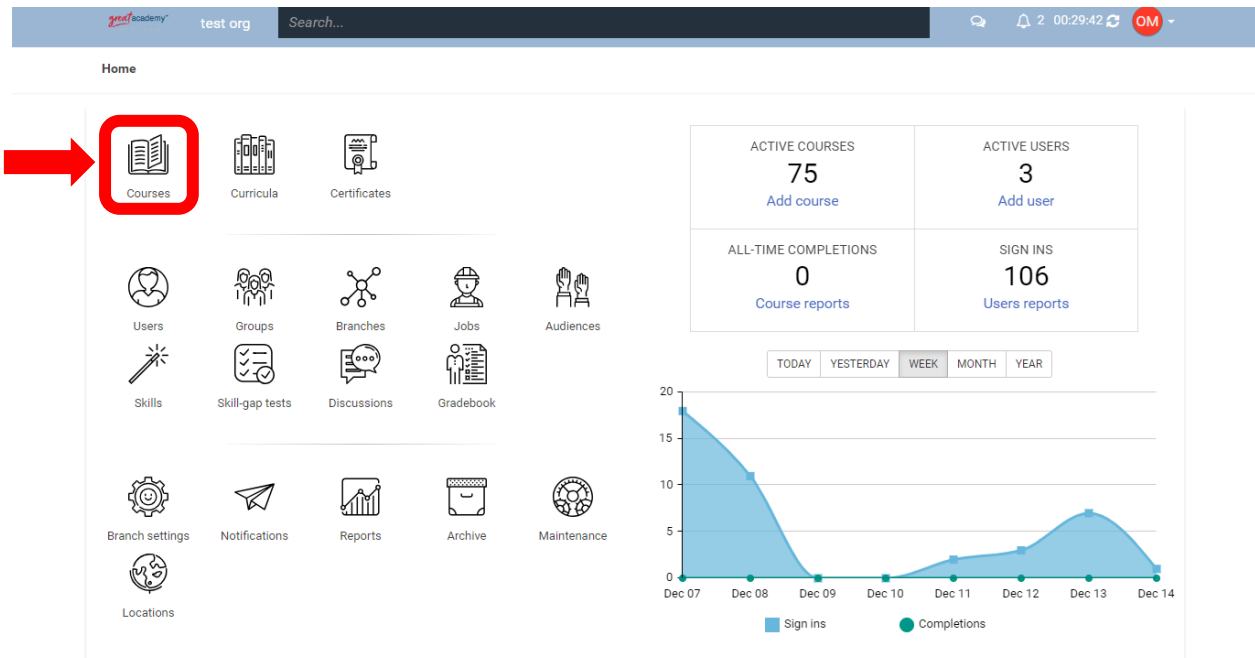
Note: Maximum import size is 1000 lines

IMPORT

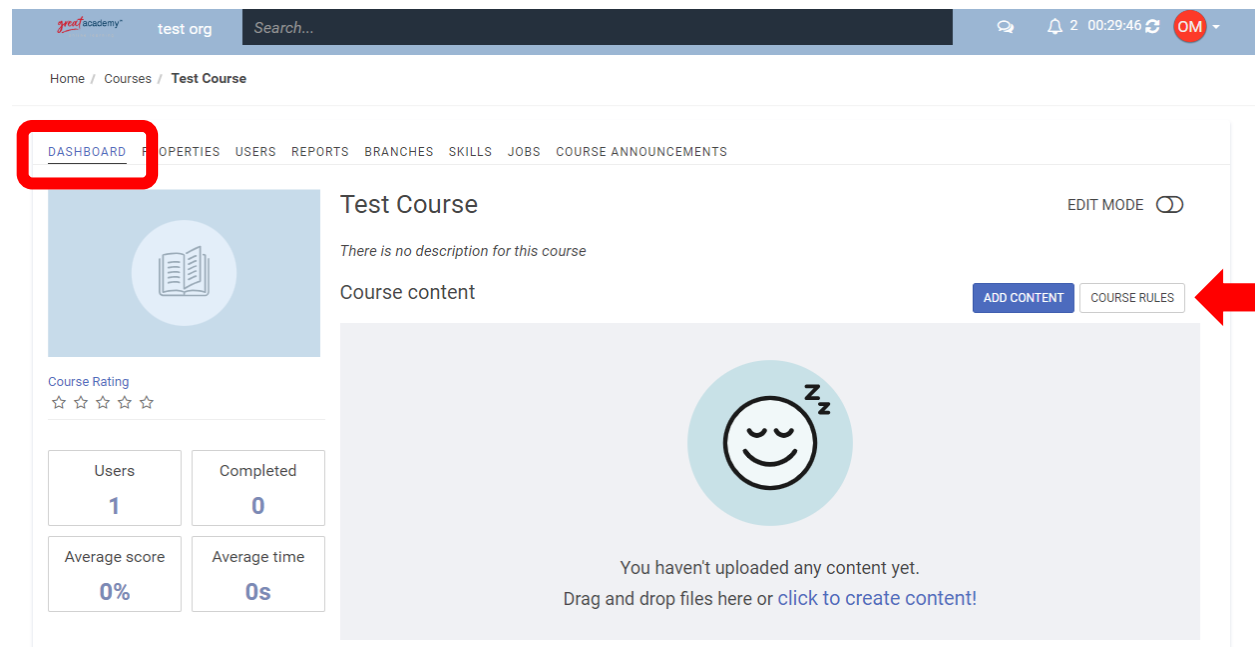
GreatAcademy® Quick Guide - Setting Course Rules

For courses to be marked complete and for a user to receive their certificates, course rules must be added to each course.

1. Click on **COURSES** and choose whether you would like to add a new course or edit an existing course.



2. Once a course is added or selected, go to the **DASHBOARD** page, and click **COURSE RULES**.



3. Click **ADD CONDITION**.

gms academy test org Search...

Home / Test Course / Course rules

Course score rule

Set the course score equal to

Completed course change score

SAVE **RECALCULATE SCORE**

Serial traversal rule

Serial rule disabled ☐

By enabling this, learner can not see a unit before completing the previous one

Completion rules

At least one rule must be defined for a course, in order to be able to be completed by learners

ADD CONDITION

Type ^	Relation to others	Unit	Percentage	Time	Operations
Completed all units	AND	-	-	-	

Filter

Showing 1-1 out of 1

4. Select **COMPLETED ALL UNITS** and **ADD**.

gms academy test org Search...

Home / Test Course / Course rules / **Add condition**

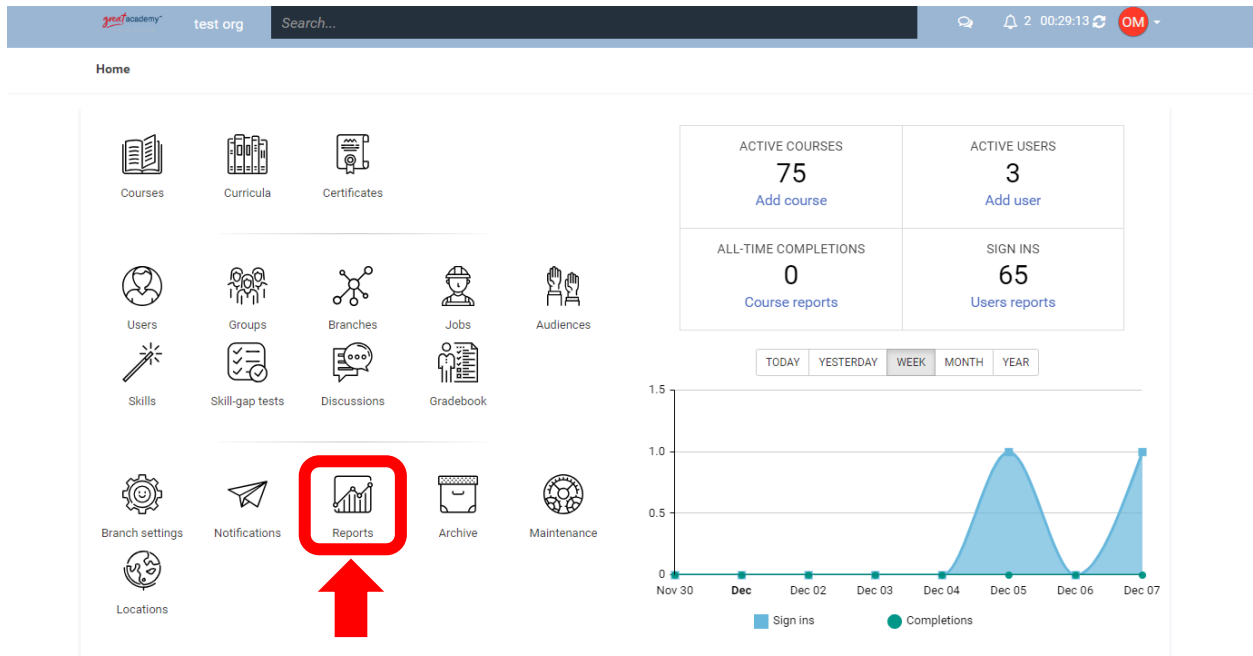
Condition

Relation with other conditions

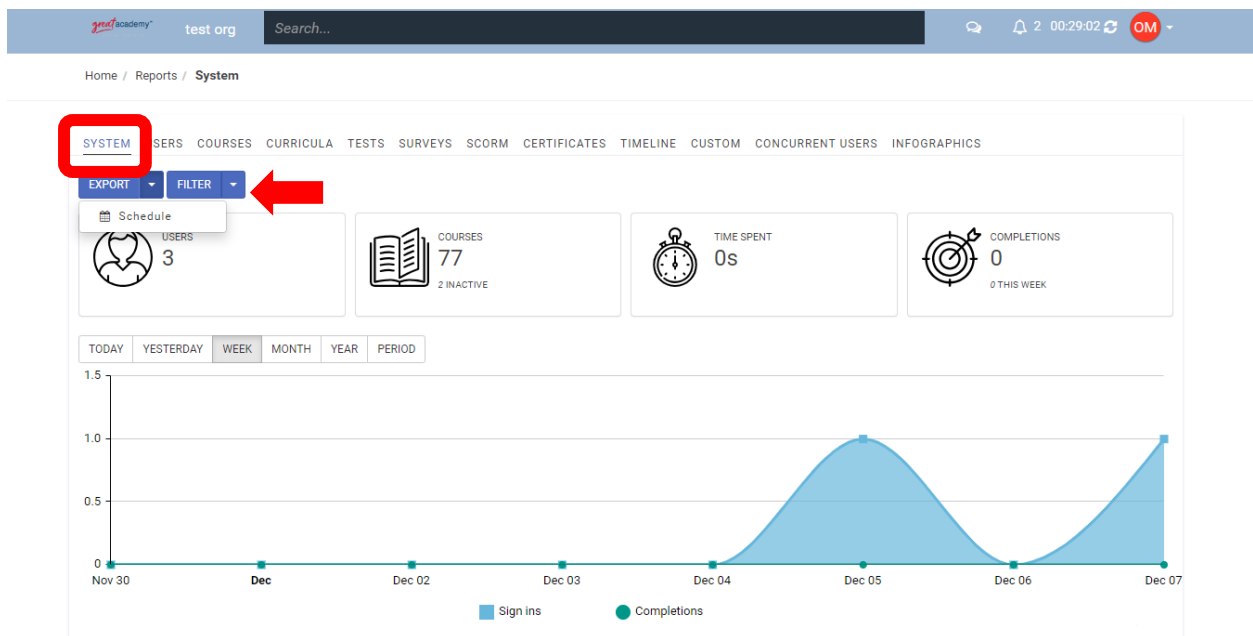
ADD

GreatAcademy® Quick Guide - How to Pull Reports

1. From your portal admin home page, click on **REPORTS**.



2. From the Systems tab, you can pull a report on your entire portal and schedule it to go out.



3. On the Users Reports tab, you can pull a report on specific user by clicking on their name. You can also use the **FILTER** button to narrow down your list of users.

The screenshot shows the 'Users' report page. At the top, there's a navigation bar with 'test org' and a search bar. Below it, a breadcrumb trail reads 'Home / Reports / Users'. A horizontal menu contains various report categories: SYSTEM, USERS, COURSES, CURRICULA, TESTS, SURVEYS, SCORM, CERTIFICATES, TIMELINE, CUSTOM, CONCURRENT USERS, and INFOGRAPHICS. The 'USERS' category is selected. Below the menu, there are two buttons: 'MASS ACTIONS' and 'FILTER', both highlighted with red boxes. The 'FILTER' button has a dropdown arrow. Underneath these buttons are four summary cards: 'LEARNERS' (0), 'COMPLETIONS' (0 THIS WEEK), 'TIME SPENT' (0 seconds), and 'LATEST ACTIVITY' (Never). Below the cards is a table with columns: User, Type, Branch, Completed / Total, CEUs, Last login, VolunteerMatters ID, EmployeeID, Branch, and Department. The first row shows 'Olivia Murphy' as the user, 'Administrator' as the type, and 'test org' as the branch. A red arrow points to the user's name. At the bottom, there is a 'Filter' input field and a download icon. The text 'Showing 1-1 out of 1' is displayed on the right.

4. Use the **MASS ACTIONS** button to make changes to users in bulk.

This screenshot is similar to the previous one, but the 'MASS ACTIONS' dropdown menu is open, showing a list of actions: 'Enroll to course', 'Unenroll from course', 'Enroll to curriculum', 'Unenroll from curriculum', 'Add to group', 'Remove from group', 'Send message', 'Deactivate', 'Activate', and 'Archive'. The 'MASS ACTIONS' button is highlighted with a red box. The rest of the interface, including the summary cards and the user table, remains the same.

5. On the course reports, you can pull a report on a specific course by clicking on the course name. You can also use the **FILTER** button to narrow down your list of courses.

Home / Reports / Courses

SYSTEM USERS **COURSES** CURRICULA TESTS SURVEYS SCORM CERTIFICATES TIMELINE CUSTOM CONCURRENT USERS INFOGRAPHICS

MASS ACTIONS **FILTER**

COURSES 77

COMPLETIONS 0 THIS WEEK

TIME SPENT 0 seconds

LATEST ACTIVITY 12/05/2023 16:55

Name	Created on	Completed / Total	Provider
(ga) Summer Camps - Adopting a Culture of Safety		-	Great American Insurance Group
(ga) Summer Camps - Golf Carts and Similar Vehicles		-	Great American Insurance Group
(ga) Rules of the Road		-	SafetyFirst
(ga) Van Operators III		-	SafetyFirst
(ga) Social Media Safety		-	Praesidium, Inc.
(ga) Preventing Abuse and Exploitation in Pastoral Ministry		-	Praesidium
(ga) Preventing Sexual Activity Between Adolescents		-	Praesidium

6. Use the **MASS ACTIONS** button to make changes to courses in bulk.

Home / Reports / Courses

SYSTEM USERS **COURSES** CURRICULA TESTS SURVEYS SCORM CERTIFICATES TIMELINE CUSTOM CONCURRENT USERS INFOGRAPHICS

MASS ACTIONS **FILTER**

Add to group

Remove from group

Add to branch

Remove from branch

Add to audience

Remove from audience

Add to job

Remove from job

Send message

Deactivate

Activate

Reset User Progress

Revoke User Certificates

Archive

COMPLETIONS 0 THIS WEEK

TIME SPENT 0 seconds

LATEST ACTIVITY 12/05/2023 16:55

Name	Created on	Completed / Total	Provider
(ga) Summer Camps - Adopting a Culture of Safety		-	Great American Insurance Group
(ga) Summer Camps - Golf Carts and Similar Vehicles		-	Great American Insurance Group
(ga) Rules of the Road		-	SafetyFirst
(ga) Van Operators III		-	SafetyFirst
(ga) Social Media Safety		-	Praesidium, Inc.
(ga) Preventing Abuse and Exploitation in Pastoral Ministry		-	Praesidium
(ga) Preventing Sexual Activity Between Adolescents		-	Praesidium

7. On the custom reports, you can create your own unique reports by clicking on **CREATE**.

The screenshot shows the 'Custom' reports page. At the top, there is a navigation bar with the 'great academy' logo, 'test org', and a search bar. Below the navigation bar, there is a breadcrumb trail: 'Home / Reports / Custom'. The main content area has a tabbed interface with tabs for 'SYSTEM', 'USERS', 'COURSES', 'CURRICULA', 'TESTS', 'SURVEYS', 'SCORM', 'CERTIFICATES', 'TIMELINE', 'CUSTOM', 'CONCURRENT USERS', and 'INFOGRAPHICS'. The 'CUSTOM' tab is selected. Below the tabs, there is a 'CREATE' button highlighted with a red box. Below the 'CREATE' button, there is a table with columns 'Title', 'Next Export Schedule', and 'Operations'. There is a 'Filter' input field and a 'Showing 1-2 out of 2' indicator.

8. Give the report a name, select all fields that you would like to see on your reports under output information, and choose any rules you would like to put in place for your report.

The screenshot shows the 'Create' report page. At the top, there is a navigation bar with the 'great academy' logo, 'test org', and a search bar. Below the navigation bar, there is a breadcrumb trail: 'Home / Reports / Custom / Create'. The main content area has a tabbed interface with tabs for 'SYSTEM', 'USERS', 'COURSES', 'CURRICULA', 'TESTS', 'SURVEYS', 'SCORM', 'CERTIFICATES', 'TIMELINE', 'CUSTOM', 'CONCURRENT USERS', and 'INFOGRAPHICS'. The 'CUSTOM' tab is selected. Below the tabs, there is a 'General Information' section with two fields: 'Report's Title*' and 'Output Information*'. Both fields are highlighted with a red box. Below the 'General Information' section, there is a 'Rules' section with a blue box containing the text 'Refer any user. - 1 user found' and an 'ADD RULE' button. Below the 'Rules' section, there is a 'Scheduled Export' section with an 'Enabled*' dropdown menu set to 'No', an 'Export as CSV' checkbox, and a 'SAVE' button highlighted with a red box. Below the 'SAVE' button, there is a note: 'Required fields are marked with an asterisk (*)'.

9. You can choose to schedule your custom reports by **ENABLING CUSTOM REPORTS** and choosing how often and whom you would like them to go to.

The screenshot shows the 'Scheduled Export' section. It has an 'Enabled*' dropdown menu set to 'Yes', which is highlighted with a red box and a red arrow pointing to it. Below the 'Enabled*' dropdown, there is a 'Send On' field with the value '12/07/2023 08:28' and a 'UTC -05:00' indicator. Below the 'Send On' field, there is a 'Repeat every' field with the value '24' and a set of buttons for 'hours', 'days', 'weeks', and 'months'. Below the 'Repeat every' field, there is a 'Recipients' field with the value 'omurphy@gaig.com' and a red 'x' icon. Below the 'Recipients' field, there is an 'Export as CSV' checkbox and a note: 'Required fields are marked with an asterisk (*)'. At the bottom, there is a 'SAVE' button.