



# **GROUP MANAGEMENT**

# Introduction

This document will assist to you with the elements of managing a group in the Compliance Academii online learning system. As a group leader you are able to add group members, remove group members and view reports on the progress of your group members.

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## Purchasing your course(s)


Visit the Compliance Academii website to view the courses offered.

If you have a Compliance Academii account login to your account. You can then visit the Courses tab to start your purchase.

When you have chosen the course you would like to purchase you can click on the *Purchase This Course For My Group* button. This will add the course into your cart. You will be redirected to your cart once the course has been added.

CART

Cart updated.

Product	Price	Quantity	Subtotal
 The Controlled Goods Program (Basic) Group Registration	\$45.00	3	\$135.00

Coupon code:

**CART TOTALS**

Subtotal	\$135.00
HST (13%)	\$17.55
<b>Total</b>	<b>\$152.55</b>

You may add the number of group members you would like to have in your group by clicking on the arrow buttons next to the Quantity in your item. **You do not need to account for yourself as the leader in this unless you plan on taking the course. You can be a group leader and not be included in the group total.**

If you would like to add another course to your cart you can click on the Continue Shopping button to return to the Course page. **If you purchase multiple courses each course will require a separate list of members to be added to it.**

Once you have finished add your group totals and updated your cart you may Proceed to Checkout and complete your purchase.

**NOTE: The name and email of the purchaser will be the user created as the Group Leader.**

Once your purchase has been completed you will re-



Welcome to ComplianceAcademii

Hi group.leader,

Thanks for creating an account on ComplianceAcademii. Your username is **group.leader**. You can access your account area to view orders, change your password, and more at: <https://complianceacademii.com/profile/>

Your password has been automatically generated: **HYt^UGT&PXd4**

We look forward to seeing you soon.

ceive your receipt in and email and a separate email with your username and login for future reference.

## Managing Your Group

Upon completion of your purchase you will be logged into the system. You can access your group information from the Your Profile section.

With the login information you received in your email you may log into the Compliance Academii website (<https://complianceacademii.com>) in the future.

If you as the Group Leader are also to have access as a user you will need to add your email address and name to the Group. As soon as you do this you will see the course appear in the Your Courses section at the top of Your Profile. Follow the directions below to add yourself and your Group Users to the group.

Your Group Dashboard shows what Groups you are in charge of, what courses are associated with your Group and the Users you have in your group.

## YOUR PROFILE

### YOUR COURSES

Expand All

THE CONTROLLED GOODS PROGRAM (BASIC)

### CERTIFICATES EARNED

Complete courses to earn certificates

### GROUP MANAGEMENT

GROUP The Controlled Goods Program (Basic) Group

Users Registration Left: 1

#### Associated Courses

- The Controlled Goods Program (Basic)

Enrolled Users Enroll New User Report

BULK REMOVE

Show 10 Users

Search

	Name	Email	Action
No user is enrolled.			

Showing 0 to 0 of 0 entries

Previous Next

### Course Information

Your list of courses your are logged into and a Group Leader of

Your enrolled Course Progress

List of Course Certificates for completed courses

### Group Management Section

Here you can view existing members, enrol new members and view reports on individual members within the group.

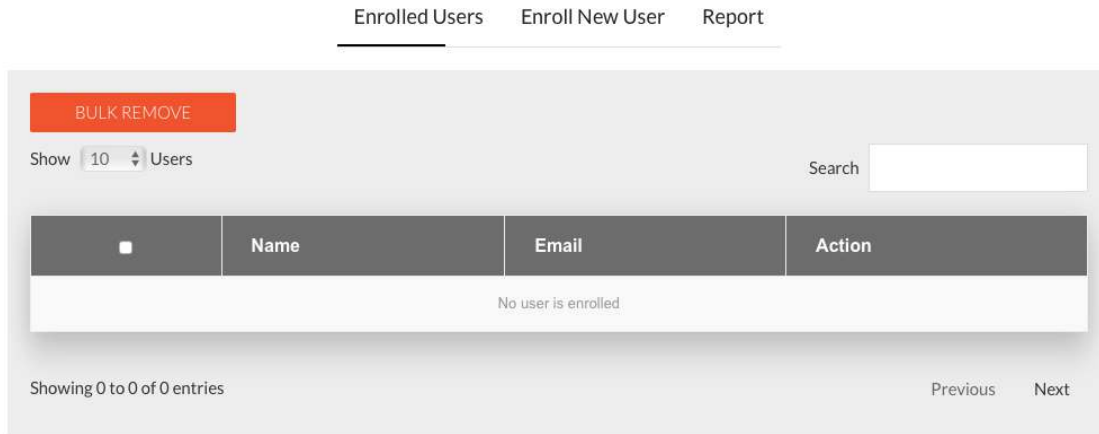
### Member Management Section

Here you can view existing members, enrol new members and view reports on individual members within the group.

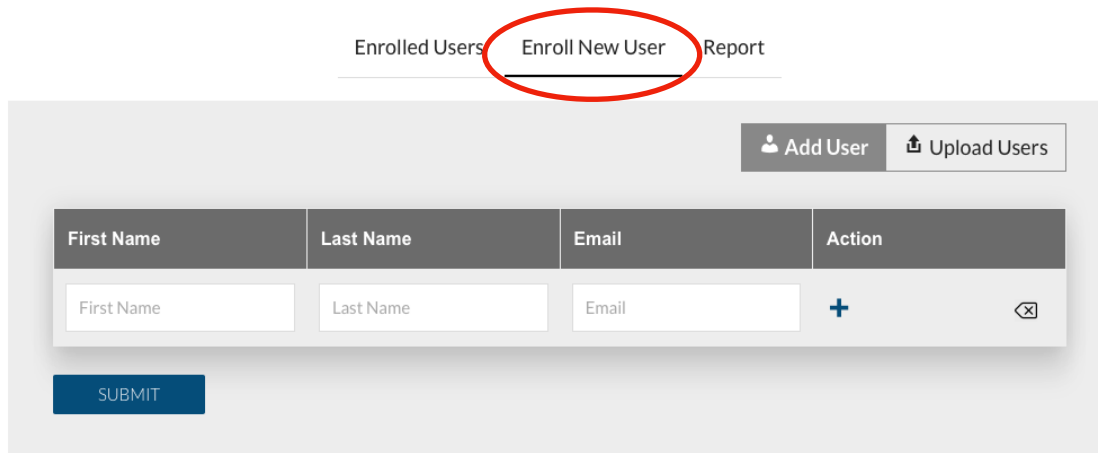


# Enrol New Users

Upon logging into your profile as a Group Leader you will need to add your group users to your group. Under the Enrolled Users tab, you will see that it is empty.



To invite a new user to the group, click on the *Enroll New User* tab at the top of the box. Enter the new users First Name, Last Name and Email.



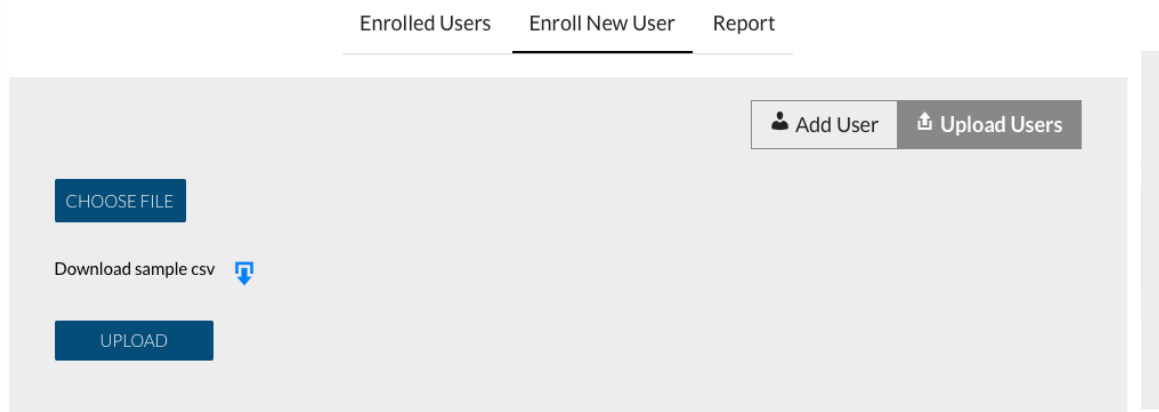
Enter the user's first and last name and email address and click Submit.

If your new member is already in the Compliance Academii system (associated with the email you entered) they will receive an email letting them know that they have been enrolled in a course.

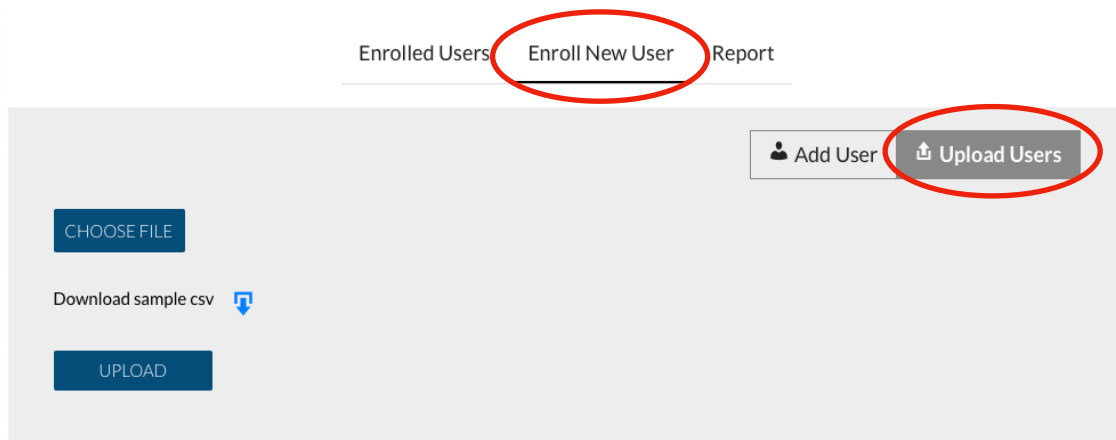
If your new member is not part of the Compliance Academii system (doesn't have an account associated with the email you used) they will receive an email with a username and password from Compliance Academii.

When they log into Academii they will be enrolled and have access to the course(s) your Group has access to. As soon as they log in, they will be taken to their Profile page where they can begin learning.

# Bulk Enroll Users



Click on the Enroll New User tab in the top menu of your User Management Section.  
Click on the Upload Users button in the top right corner of your User Management section.



Create a CSV file using Microsoft Excel or other equivalent program). Use the following format in the CSV file. Make sure to save the file as a .csv file on your computer (where you can find it) when the list is complete.

First Name	Last Name	Email
John	Doe	<a href="mailto:johndoe@email.com">johndoe@email.com</a>
Jane	Doe	<a href="mailto:janedoe@email.com">janedoe@email.com</a>

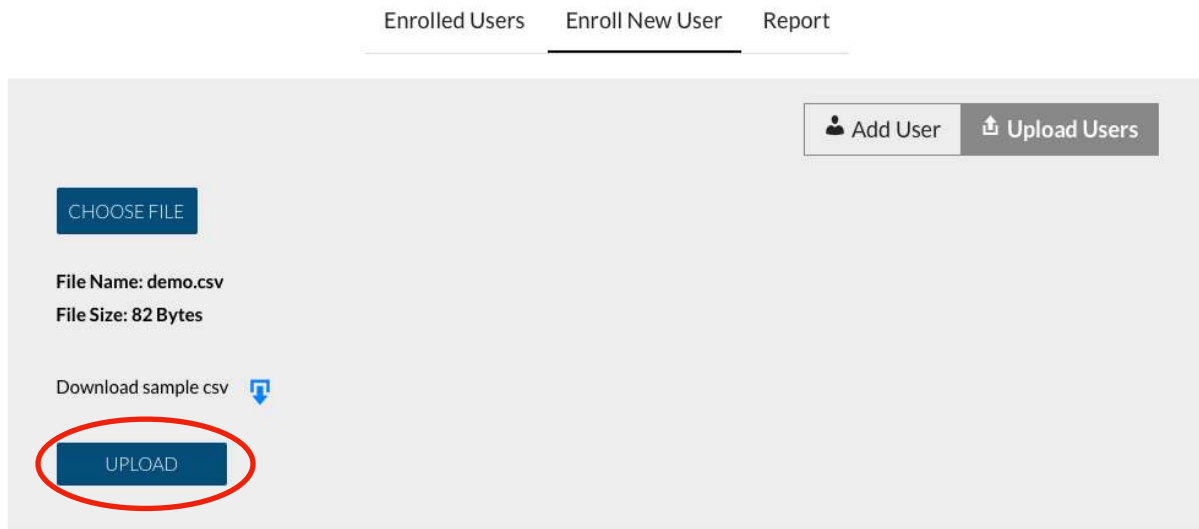
[DOWNLOAD THE CSV TEMPLATE HERE](#)

Your number of users is limited to the number of user spots you have been given access to (what you purchased for your Group). If you require more please contact us ([support@complianceacademii.com](mailto:support@complianceacademii.com)) to increase the number of users in your group.



Click on the Choose File button and locate your saved CSV file and select Choose for Upload in the search window.

Click Upload. Once the file has uploaded you can click on Enrolled Users and you will see all your new Users.



Each new user will receive an email with their login information for the Compliance Academii site.

Existing users in the system will receive a notification that they have been enrolled in a new course.

## Removing a Group User

To remove a group member, you can select the Enrolled Users tab. The list of Group Users will be displayed.

Click on the REMOVE button to the right of the User entry you wish to delete.

This will not remove them from the Compliance Academii System, it will just remove them from the group, the courses associated with your group. If the user has completed the course successfully, they will still have access to their certificate(s).

Removing a group member will not increase the number of spaces available in your group.

## Bulk Remove Users

Under the Enrolled Users tab, check the members you would like to remove in your list of Group Users

Enrolled Users   Enroll New User   Report

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**BULK REMOVE**

Show  Users Search

<input type="checkbox"/>	Name	Email	Action
<input checked="" type="checkbox"/>	Jane Doe	janedoe@email.com	<input type="button" value="RE-INVITE"/> <input type="button" value="REMOVE"/>
<input checked="" type="checkbox"/>	John Doe	johndoe@email.com	<input type="button" value="RE-INVITE"/> <input type="button" value="REMOVE"/>

Showing 1 to 2 of 2 entries Previous  Next

Click the Bulk Remove button, confirm the deletion if a warning message comes up.

Your selected users will be removed from the Group.

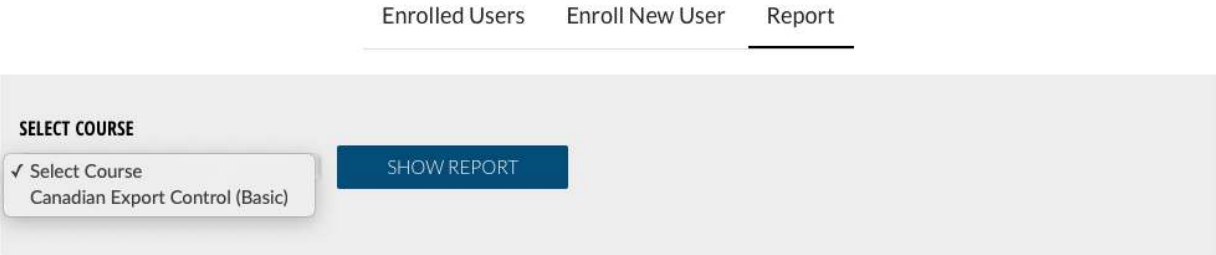
This will not remove them from the Compliance Academii System, it will just remove them from the group, the courses associated with your group. If the user has completed the course successfully, they will still have access to their certificate(s).

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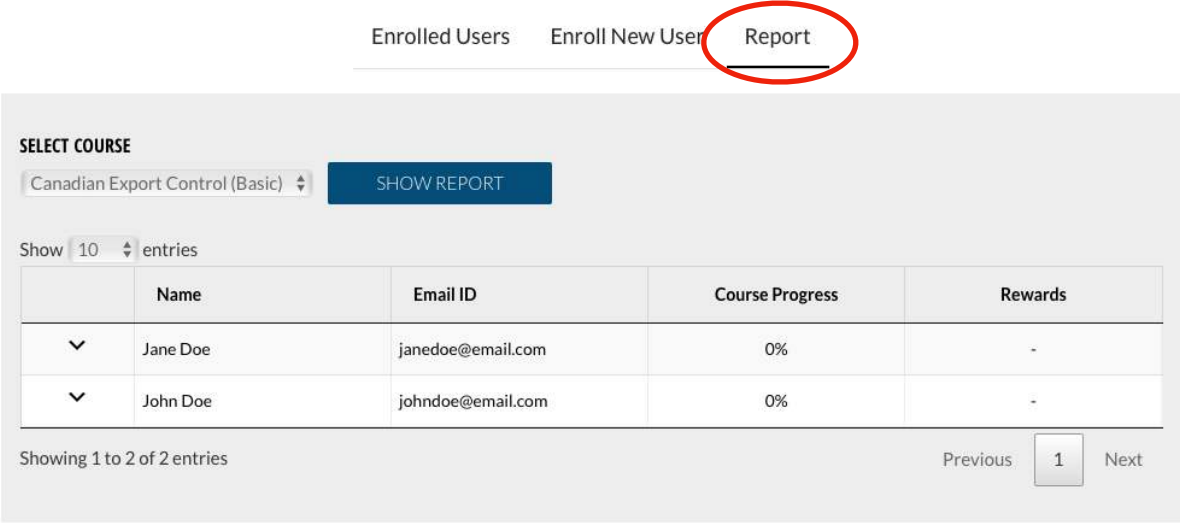
# Reporting

You can view the progress of individual group members in the courses your group has access to with Reports.

Click on the Report tab at the top of the box.



Select the course you would like to view in the dropdown box and click on the Show Report button. The report for all students enrolled in that course will appear.



# Information for your New Group Members

Prior to registering your new group members you may want to let them know they are being registered for a new course and to watch for their registration email.

Compliance Academii

Your account is created on ComplianceAcademii

To: Jane Doe

Inbox - Google 8:27 PM



Your account is created on  
ComplianceAcademii

Hello Jane Doe,

Your account is created on our website, please find login details given below:

Email: Jane.Doe@acme.com

Password: 8PjXPozY

Click [here](#) to login & start learning.

ComplianceAcademii —

If they do not receive their email for some reason, please check that the email address was entered correctly. If it was not you can send our support team a request to update it ([support@complianceacademii.com](mailto:support@complianceacademii.com))

If your group member loses their password they may reset it from the login screen using the email address their account was created with.