



## **TEAM LEADERS:**

How to set up and manage users in the Dashboard

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*ALI Lifting It Right training access*

# Intro to dashboard



**WELCOME:** To take the course, click the “x”. To go to the Team Lead Dashboard, click “Continue to my dashboard”

The screenshot shows the Lifting It Right dashboard interface. At the top, there is a navigation bar with the logo and menu items: Home, Learning Library, Assigned Training, Live Sessions, Achievements, and Inbox. A user profile icon labeled 'Sample Account' is in the top right. Below the navigation bar, a greeting reads 'Welcome, Sample Account'. The main content area is divided into several sections. On the left, the 'My Training' section has tabs for 'Not Started', 'In Progress', 'Overdue', and 'Completed'. Below these tabs is a search bar for assigned courses and learning paths. A video player for the 'Automotive Lift Safety Training Course' is visible, with the title 'Levantandolo Correctamente!' and a progress bar at 0%. A central white modal window is overlaid on the dashboard, containing a welcome message: 'Welcome! Check out the video below to get a quick overview of the platform: Also, make sure to check out the Admin Dashboard that can be accessed from the Features & Setup Menu.' Below the message is a yellow button labeled 'Continue to my dashboard' and a checkbox option 'Always show this message on the Home page'. To the right of the modal, the 'Recently Viewed' section features a blue icon and text: 'Gain quick access to your recently viewed content every time.' Below this is a search bar for content. At the bottom right, the 'Recent Achievements' section shows a trophy icon and a badge for 'Lifting It Right' achieved 14 months ago, with a 'Rate me!' link. A 'See All' button is located at the bottom center of the dashboard area.



# Managing Users



# DASHBOARD: Navigate to the top menu and click on “Teams”

The dashboard for the 'ALI Staff' team displays the following information:

- Navigation:** Lifting It Right | My Learning | Teams | Inbox | Help | Leader Test
- Team Selection:** You are viewing the team: ALI Staff
- Summary Cards:**
  - Total Courses: 1
  - Total Users: 10
  - Active Courses: 1
  - Active Users: 10
- Team Reports:**
  - Course Activity
  - User Activity
  - Module Activity
- Modules Require Marking:** 0
- Actions:**
  - Create a user
  - Upcoming ILT schedule
- Recently Viewed:**
  - Person: Chuck Basil Jr
  - Person: Leader Test
- Activity:** View All
- News:** Show all News

**TEAMS:** Click on “People” to see the list of your current users.

The screenshot shows the Lifting It Right dashboard interface. At the top left, the logo "AL Lifting It Right" is displayed, followed by navigation links: "My Learning", "Teams" (highlighted with a yellow box), "Inbox", and "Help". On the top right, a user profile icon labeled "Leader Test" is visible.

The main dashboard area is divided into several sections:

- Global Library**: Includes "Assign Content".
- People**: Includes "Find People", "Add People", "Bulk Import", "Login Activity", and "Marking List".
- Teams**: Includes "Create New Team", "Team Admin Dashboard", "Bulk Import", "Team Tree View", and "All Teams".
- Reporting**: Includes "Reporting Dashboard", "Reporting Engine", "My Scheduled Reports", and "Compliance Quick Report".

Below these sections, there are several data and action cards:

- Team Reports**: Contains three buttons for "Course Activity", "User Activity", and "Module Activity".
- Modules Require Marking**: Displays a large blue "0" indicating the number of modules requiring marking.
- Actions**: Two prominent yellow buttons: "Create a user" and "Upcoming ILT schedule".
- Activity**: A section with a "View All" button.
- News**: A section with a "Show all News" button.
- Recently Viewed**: A list showing "Person" entries for "Chuck Basil Jr" and "Leader Test".

# Adding a New User



**PEOPLE:** To add a new user, click on “Add a new person”

**Lifting It Right** My Learning Teams Inbox Help Leader Test

Add Filter Quick Search

You are viewing the team  
Company Name

**People (10)**

<input type="checkbox"/> User	Access Level	Status	Last Login
<input type="checkbox"/> <b>User 1</b> user1@email.com		Active	Never logged in
<input type="checkbox"/> <b>User 2</b> user2@email.com		Active	Never logged in
<input type="checkbox"/> <b>User 3</b> user3@email.com		Active	Never logged in
<input type="checkbox"/> <b>User 4</b> user4@email.com		Active	Never logged in
<input type="checkbox"/> <b>User 5</b> user5@email.com		Active	Never logged in
<input type="checkbox"/> <b>User 6</b> user6@email.com		Active	1 minute ago
<input type="checkbox"/> <b>User 7</b> user7@email.com		Active	Never logged in

Add a new person

Options

Perform a bulk action on selected people

## USER: Fill in the fields for the new user.

 **Lifting It Right** [My Learning](#) [Teams](#) [Inbox](#) [Help](#) Leader Test [v](#)

People / Add a new person

You are viewing the team  
Company Name [v](#)

**Add a new person**

\* is required field  
Enter a first name, last name and username to setup a new learner

**Team**  
Company Name [v](#)

**First Name\***

**Last Name\***

**Username\***  
  
Most people use an email address as their username

Send an email to this person with a link to login.

**Active**

**Access Level**  
Learner [v](#)

**Email**

Disable all email notifications for messages

**Add person**

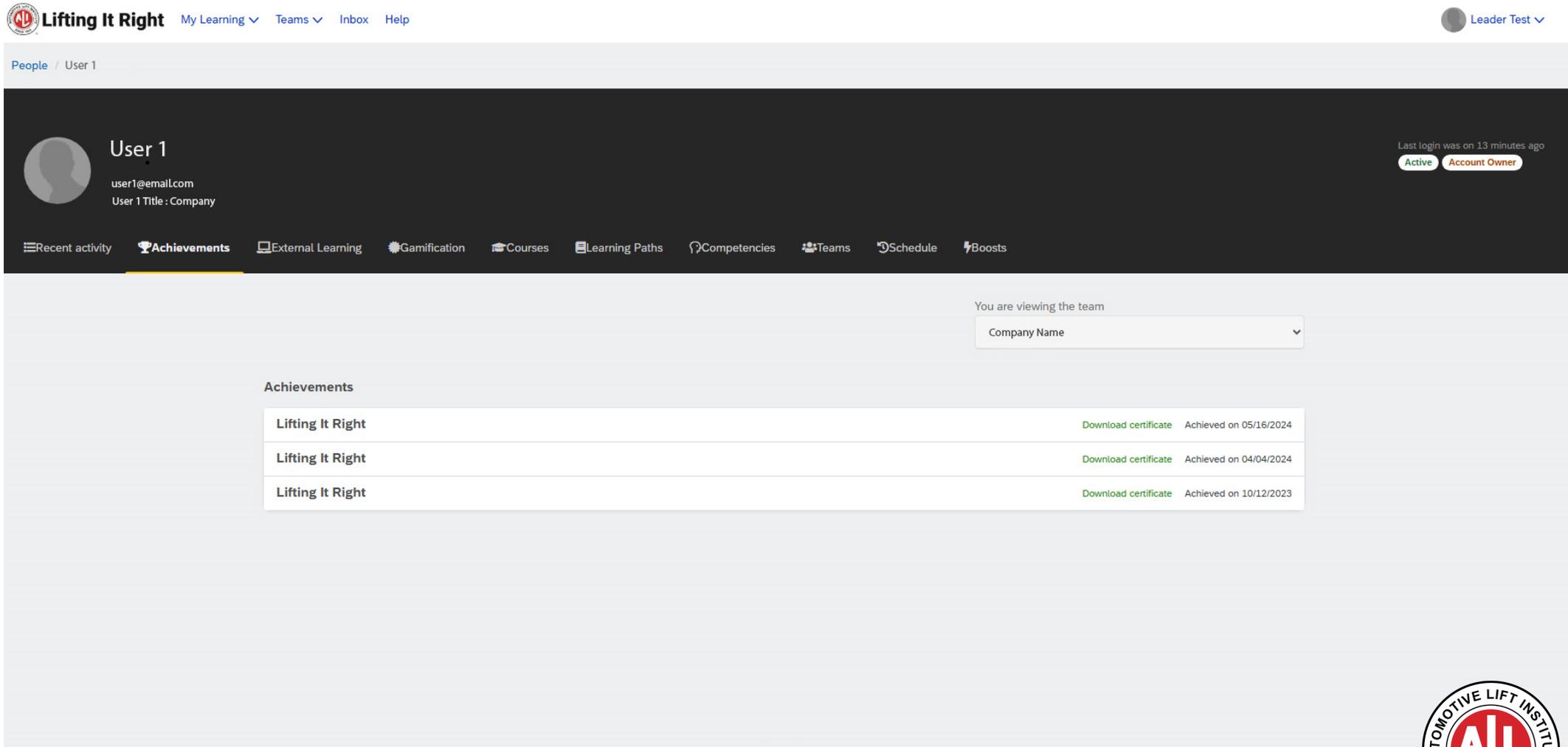
**Add person and then add another**

Cancel

# Download Certificate



**DOWNLOAD CERTIFICATE:** Once that user has completed the course, click on their name, navigate to “Achievements” and then click “Download Certificate” for the most recent course completion.



The screenshot shows the user profile page for 'User 1' in the Lifting It Right system. The user's email is 'user1@email.com' and their title is 'Company'. The page features a navigation menu with options like 'Recent activity', 'Achievements', 'External Learning', 'Gamification', 'Courses', 'Learning Paths', 'Competencies', 'Teams', 'Schedule', and 'Boosts'. The 'Achievements' section is active, displaying a table of three completed courses, all titled 'Lifting It Right'. Each entry includes a 'Download certificate' link and the date of completion.

Achievements	Download certificate	Achieved on
Lifting It Right	<a href="#">Download certificate</a>	Achieved on 05/16/2024
Lifting It Right	<a href="#">Download certificate</a>	Achieved on 04/04/2024
Lifting It Right	<a href="#">Download certificate</a>	Achieved on 10/12/2023

# Resend or Reset Credentials

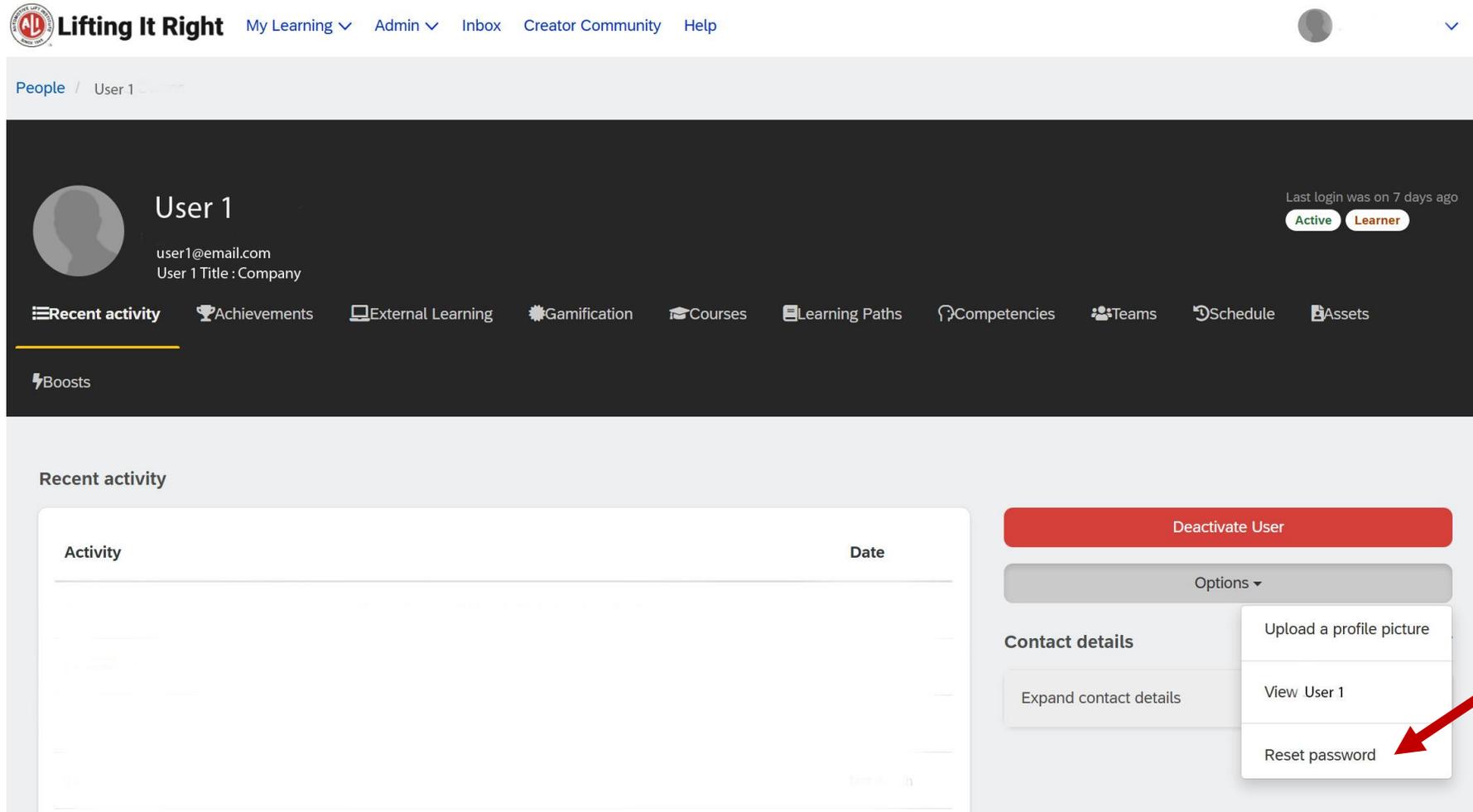


**RESEND USER CREDENTIALS:** If the user does not receive their credentials, they can manually be sent from with the profile. Click on the user’s name to open the profile, then click on the “Options” dropdown and then “Send Login Emails”. Then follow the prompts to resend the one-time link.

The screenshot shows the user profile page for 'User 1' in the Lifting It Right system. The page includes a navigation bar with 'My Learning', 'Admin', 'Inbox', 'Creator Community', and 'Help'. The user profile section displays 'User 1' with email 'user1@email.com' and title 'User 1 Title : Company'. A status bar indicates 'Never logged in' with 'Active' and 'Learner' tags. A horizontal menu contains various system features. The 'Recent activity' section shows a message: 'Recent activity is shown for 60 days.' On the right, there is a 'Deactivate User' button and an 'Options' dropdown menu. The dropdown menu is open, showing options: 'Upload a profile picture', 'View Lauraine', 'Reset password', and 'Send login emails'. A red arrow points to the 'Send login emails' option.



**RESET USER PASSWORD:** If the user does not remember their password, it can manually be reset from with the profile. Click on the user’s name to open the profile, then click on the “Options” dropdown and then “Send Login Emails”. Then follow the prompts to resend the one-time link.



The screenshot shows the user profile for 'User 1' in the Lifting It Right system. The profile includes a placeholder for a profile picture, the email address 'user1@email.com', and the title 'User 1 Title : Company'. The user is marked as 'Active' and 'Learner', with a note that their last login was 7 days ago. A navigation bar below the profile offers various options: Recent activity, Achievements, External Learning, Gamification, Courses, Learning Paths, Competencies, Teams, Schedule, and Assets. A 'Boosts' section is also visible. On the right side of the profile, there is a 'Deactivate User' button and an 'Options' dropdown menu. The 'Options' menu is open, showing three items: 'Upload a profile picture', 'View User 1', and 'Reset password'. A red arrow points to the 'Reset password' option.

**SEND LOGIN DIRECTIONS TO THOSE THAT HAVE NEVER LOGGED IN:** If the user has never logged in, they can manually be sent the username and one-time login link. When viewing your whole account, click on the “Options” dropdown and then “Send Login Emails”. This will automatically resend the one-time link to **every** user that has not logged in previously.

The screenshot shows the 'Lifting It Right' user management interface. At the top, there is a navigation bar with the logo and links for 'My Learning', 'Admin', 'Inbox', 'Creator Community', and 'Help'. Below this is a breadcrumb trail 'Teams / Team Name'. The main header area displays 'Team Name' and a navigation bar with icons for 'People', 'Courses', 'Learning Paths', 'Course Team Library', 'Learning Path Team Library', 'Assets', and 'Settings'. The 'People' section is active, showing a list of 64 users. A search bar and a 'Show Inactive' checkbox are at the top of the list. The list contains four users, each with a 'Promote' dropdown, an 'Active' status indicator, and a close icon. To the right of the list is a sidebar with three yellow buttons: 'Assign people to this team', 'Add a new person to this team', and 'Add a new team under this team'. Below these is an 'Options' dropdown menu. A red arrow points to the 'Send login emails' option in the dropdown menu. Other options in the menu include 'Deactivate all users under this team (max 3,000 users at a time)' and 'Push all users under this team into a Brand'.



# Deactivate or Remove Users

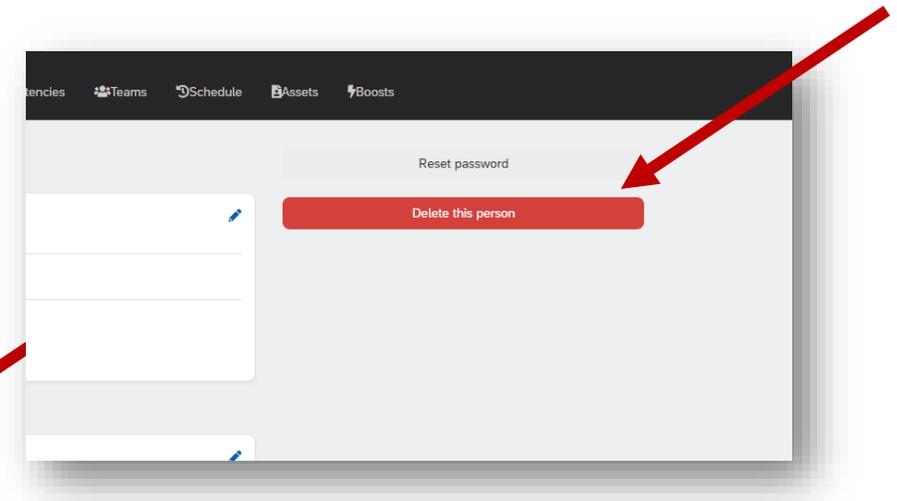
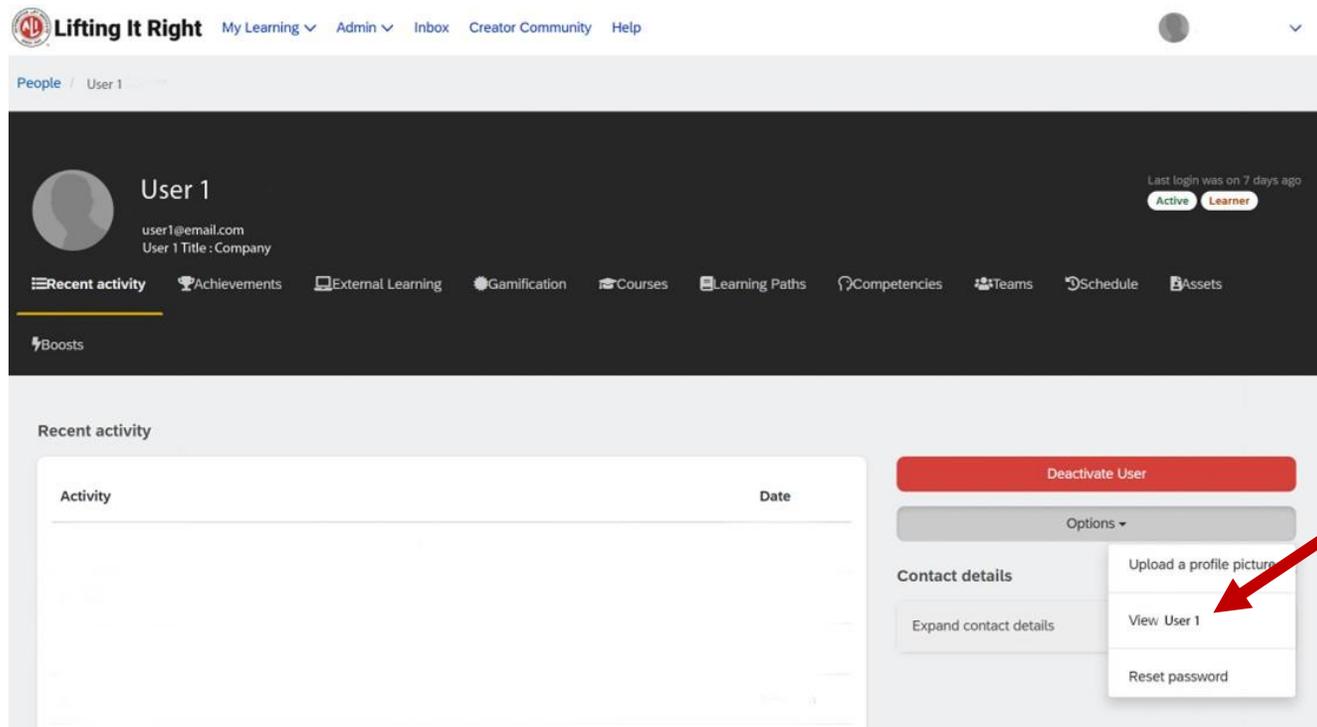


**DEACTIVATE USERS:** If you need to deactivate a user (unassign them from the course, remove them from reporting), Click on the person’s name to open the profile, then click “Deactivate User” in the user profile.

The screenshot shows the user profile interface for 'User 1' in the 'Lifting It Right' system. The top navigation bar includes 'My Learning', 'Admin', 'Inbox', 'Creator Community', and 'Help'. The user profile section displays 'User 1' with email 'user1@email.com' and title 'User 1 Title : Company'. It also shows 'Last login was on 7 days ago' and status buttons for 'Active' and 'Learner'. A navigation menu below the profile includes 'Recent activity', 'Achievements', 'External Learning', 'Gamification', 'Courses', 'Learning Paths', 'Competencies', 'Teams', 'Schedule', and 'Assets'. The 'Recent activity' section contains a table with columns 'Activity' and 'Date'. On the right sidebar, there is a red 'Deactivate User' button, an 'Options' dropdown menu, and a 'Contact details' section with an 'Expand contact details' button. A red arrow points to the 'Deactivate User' button.

**REMOVE USERS:** If you need remove someone from the account entirely, click on the user’s name to open the profile, then click on the “Options” dropdown and then “View [User]”. This will change a window to their profile settings, and a “Delete this person” button will appear at the right.

*IMPORTANT NOTE: Deleting this user will hard delete all of the user data from the system. Once this user has been deleted, they cannot be recovered.*



# Questions or problems?

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Contact ALI directly at  
[support@autolift.org](mailto:support@autolift.org)

