FC LEARNING – POWER USER GUIDE

1. ROLE OF A POWER USER

1.1 What is a Power User?

Power Users can manage their firm's users and access data on their firm's usage of the FC Learning platform. They have additional permissions within the platform enabling them to do this. A firm can have one or more Power Users. It does not need to have any Power Users, but we recommend that it has at least one.

1.2 What can a Power User do?

Power Users can:

(i) access information about all users in their firm (their 'branch');

(ii) enrol all those users on courses and, if created, learning plans; and

(iii) generate reports about usage.

The Power User functions can all be carried out via the Quick Links in the Power User Portal, which is visible in the top left-hand side of a Power User's homepage.

2. POWER USER PORTAL

We explain below how each of the Quick Links in the Power User Portal work.

2.1 My Team

2.1.1 What is it?

The My Team page allows a Power User to create quick links to users that they wish to manage and monitor on a more regular basis. Adding a user to the My Teams page does **not** change the functionality that the Power User has in relation to that user – it just provides a quick way to access that user's information and take action. For firms with multiple Power Users, a user can only be on the My Teams page of one Power User at a time.

2.1.2 How can users be added to My Team?

To add team members to My Team, follow the steps below.

(i) Go to the ‘My Team’ quick link in the Power User Portal.

(ii) Click the top right ‘Add team members’ button.

(iii) Type in the email address of the required user.

(iv) The user will then appear as a card on the ‘My Team’ page, greyed out and with the words ‘Pending confirmation’ on the top right of the card. The user will need to confirm they are happy to be added the next time they log on.

(v) Once the user has confirmed, the card will no longer be greyed out and ‘Pending confirmation’ with change to ‘New’.

2.1.3 What can a Power User do in the My Team page?

In the My Team page, Power Users will see a card for each team member. There is an ellipsis in the bottom right-hand corner of each card. Clicking on this brings up the following options.

(i) Courses dashboard: This shows at a glance the courses a user has been enrolled in, which are in progress, which are completed and which are yet to be started. It also shows which courses are overdue, if a deadline has been set against them.

(ii) Learning plans dashboard: This shows at a glance the learning plans a user has been enrolled in, which are in progress, which are completed and which are yet to be started. It also shows which learning plans are overdue, if a deadline has been set against them.

(iii) Send email: This allows the Power User to send an email to the team member (using the email addresses that each individual has logged into the FC Learning platform with).

(iv) Enrol to courses: This allows the Power User to enrol the user into one or more courses. There is also an option to set an enrolment deadline here. When selecting this, the start date will default to today’s date and should be left unchanged.

Setting a future start date will mean the user will be locked out of the course until that date. The 'active until' date can be whatever date the Power User chooses.

(v) Enrol to learning plans: This allows the Power User to enrol the user into one or more learning plans. Note that unlike courses, there is no option to set an end date when enrolling here; this will need to be done via 'Learning Plans – Enrol' quick link (addressed below).

(vi) Remove from team: Selecting this will remove the user from the 'My Team' page.

(vii) User summary report: This takes the Power User to the team member's learning record, showing their progress, performance and engagement on the platform.

It is possible to take actions (iii)-(vi) above in relation to all team members at the same time. To do this, hover over the top left-hand corner of each user card and click the small circle that appears to select it. You can then choose an action for all selected team members from the bottom right-hand corner of the screen.

2.2 Courses - Enrol

2.2.1 What is it?

This page:

(i) allows Power Users to enrol their users into individual courses and see which of their users have been enrolled on a particular course; and

(ii) set deadlines for course completion, if required.

2.2.2 How can users be enrolled on courses and given a deadline?

(i) Click on the ellipsis at the right-hand side of the course row and select 'Enrol users'.

(ii) Either select all users by clicking in the top tick box or select certain users by clicking in the tick box next to their name.

(iii) If no deadline is required, click next and confirm.

(iv) If a deadline is required, click the checkbox next to ‘Enable enrolment validity period’.

(v) Enter a date into the ‘End of validity’ section. You can do this by clicking the calendar icon and selecting the date. There is also an option to add a time if needed.

(vi) **Leave the ‘Start of validity’ date blank.** If a date is added here, the user will be locked out of the course until that date.

(vii) Click confirm.

(viii) To see who is enrolled on a course, click on the enrolments column next to the relevant course title.

2.3 Learning plans - Enrol

2.3.1 What is it?

Learning plans consist of a group of courses that a user must follow in a specific order. They allow firms to group together courses for learners to progress through one at a time, usually with a set deadline.
This page:

(i) allows Power Users to enrol their users into learning plans and see which of their users have been enrolled on a particular learning plan; and

(ii) set deadlines for learning plan completion.

2.3.2 How are learning plans set up?

Firms do not need to have learning plans. If a firm would like them, FromCounsel will set them up and they will appear on the firm’s homepage. A form to request a bespoke learning plan will be provided upon request, but there are also set FromCounsel learning plans that firms can use.

2.3.3 How can users be enrolled onto learning plans and given a deadline?

(i) Click on the title of the relevant learning plan.

(ii) Click the top right + button and then ‘Enrol users’.

(iii) Either select all users by clicking in the top tick box or select certain users by clicking in the tick box next to their name.

(iv) If no deadline is required, click next and confirm.

(v) If a deadline is required, click the checkbox next to 'Enable enrolment validity period'.

(vi) Enter a date into the 'End of validity' section by clicking the calendar icon and selecting the date. There is also an option to add a time if needed.

(vii) **Leave the 'Start of validity' date blank.** If a date is added here, the user will be locked out of the learning plan until that date.

(viii) Click confirm.

(ix) To see who is enrolled on a learning plan, click on the enrolments column next to the relevant course title.

Instead of setting a validity period in this way, it is possible for a learning plan to be set up with a set number of days for completion embedded into it. This means that when a learner is enrolled in it, it will automatically have a deadline of that number of days from the date of enrolment. The FromCounsel team can set this up upon request for the Power User.

2.4 Admin dashboard

2.4.1 What is it?

On this dashboard, Power Users can see a quick overview of activity from their users.

2.4.2 What activity details can be seen?

There is a 'Recent activities' graph which shows how activity has changed over the last month by number of sessions (how many times a course had been played), course completions, and course enrolments. Hovering the mouse over each line on the graph shows what it represents.
Further down, a circle graph shows what percentage of users have not started, are in progress with, or have completed courses.

It is also possible to see what courses are the most popular with users by enrolment rate and completion rate.

2.5 Courses dashboard

2.5.1 What is it?

This dashboard provides an overview of course statistics as well as a more detailed breakdown for a particular course.

2.5.2 What overview detail can be shown for all courses?

The course dashboard provides helpful graphics to give Power Users an overview of how courses are performing amongst their users. The first table shows a summary of how many users are enrolled, have completed, are in progress or not started all courses.

A circle 'Participation at a glance' graph shows which courses are the most popular amongst users. Hovering over sections will show exact numbers and statistics.

There is also a bar graph showing how statistics have changed over time on a monthly basis. Hovering over each bar will show the exact percentage and what status the bar represents: blue is not started, orange is in progress, and green is completed.

2.5.3 What detail can be shown in relation to specific courses and how?

To see a more detailed breakdown for a particular course, click on the course name in the Courses section of the Courses Dashboard (which is below the graphical overviews). This will then change the course dashboard and graphics to focus on just that course. Participation at a glance will change to course progression, showing the current status of users in the course.

The bottom table will show details of each user enrolled on the course, including status, date of enrolment, how much time spent on the course, last access date, completion date, and score.

2.6 Usage reports

2.6.1 What is it?

The allows Power Users to get more detailed, downloadable reports on usage. There are a few set reports that are ready to be generated, but other reports can be created and made available upon request.

2.6.2 What usage detail can be seen in relation to a particular user and how?

In the text box under ‘User personal summary’ type the name of the user and click on generate.

2.6.3 What usage detail can be seen in relation to a particular course and how?

In the text box under ‘Course summary’ type the name of the course and click on generate.

2.6.4 What other reports can be generated and how?

Under the ‘Custom reports builder’ tab, Power Users can find a few reports that are ready to click on, preview, and download. Power Users can also create their own reports using the ‘Create report’ button on the top right-hand side, but we suggest reports are requested and created by the FromCounsel team.
Reports can also be scheduled to be emailed to a specific user on a regular basis upon request.