

# Assigning Qualifications and Courses in the Learning Hub



 My profile

 My record of learning

 Course calendar

 People

 Book virtual  
classrooms

 Notifications

 Admin

 Log out

**STEP**  
ADVISING FAMILIES ACROSS GENERATIONS

As a booker, you can assign membership subscriptions, qualifications and courses to your colleagues. Go to **People** in the navigation side-panel to start.

If the colleagues you wish to assign a qualification or course to are not already added to the Learning Hub, you will need to add them as users via the **People** feature as per the instructions below.

## Adding a new user

### Single User

To add a new single user to the Hub, simply click **ADD USER** located at the top-right of the page. A new user form will be displayed.

# People

Welcome to the People page, your central hub for managing delegates and their associated accounts. Invite individuals, access profiles, and control permissions with ease, ensuring a secure and efficient collaboration environment. Streamline delegate management and enhance productivity.



 Contact Details

First Name

Last Name

Email Address

 Roles

Power User 

Standard User 

Super Admin 

Tenant Admin 

 Accounts

Wilmington Technology

 Start and Expiry date

Select Start Date

Select Expiry Date (optional)

× CANCEL

✓ SAVE

Complete the fields within the form, including contact details, roles, accounts and start date (which defaults to today's date – please note, this is the date at which they will be able to access to the Learning Hub, not the date at which their qualification or course starts), click **SAVE**.

The new user will now be visible within the People page, and an email will be sent to the email address provided containing login details to the Learning Hub.

## Multiple Users

To upload users in bulk, you can use the **Upload Users** button on the People page.

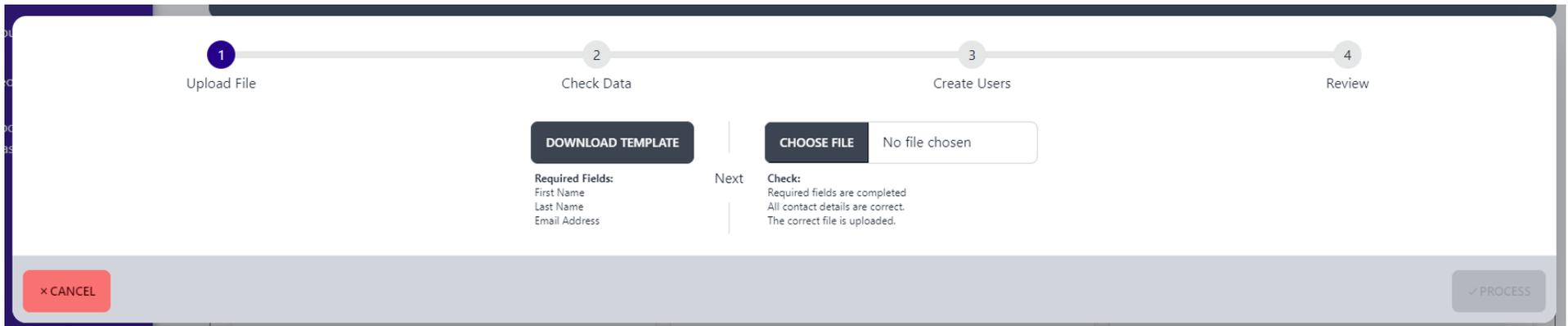
## People

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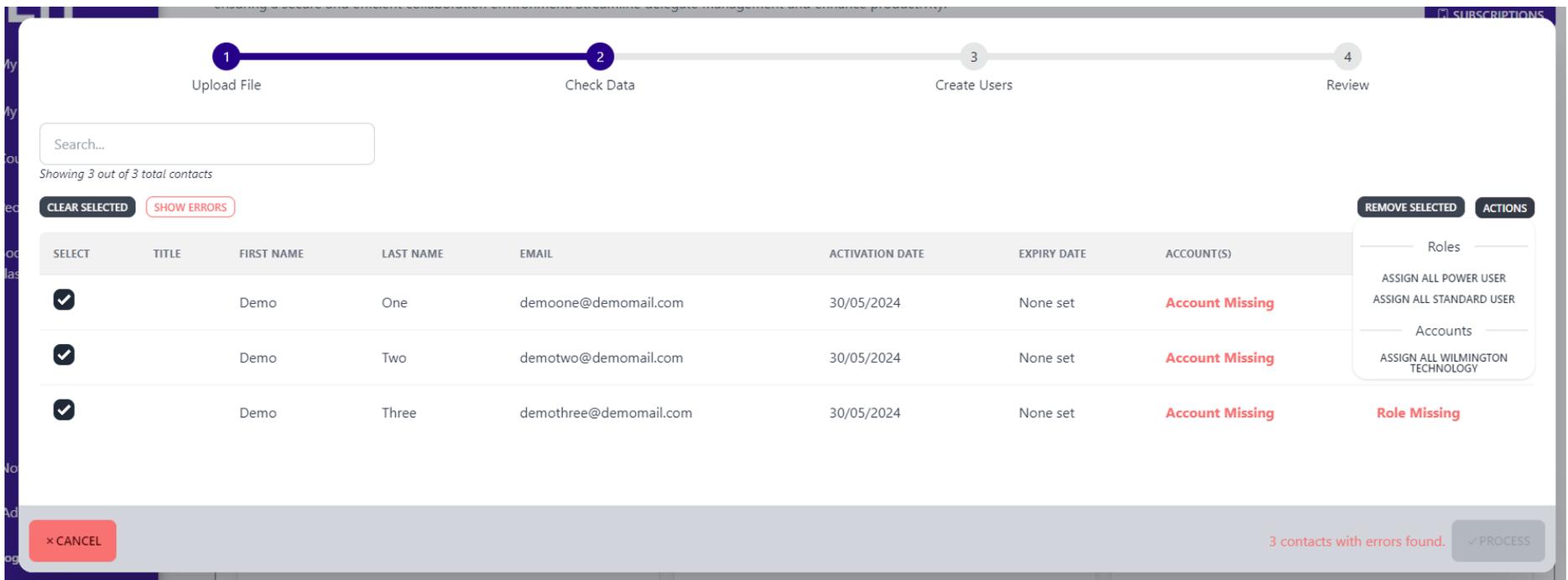
### 1. Upload Users

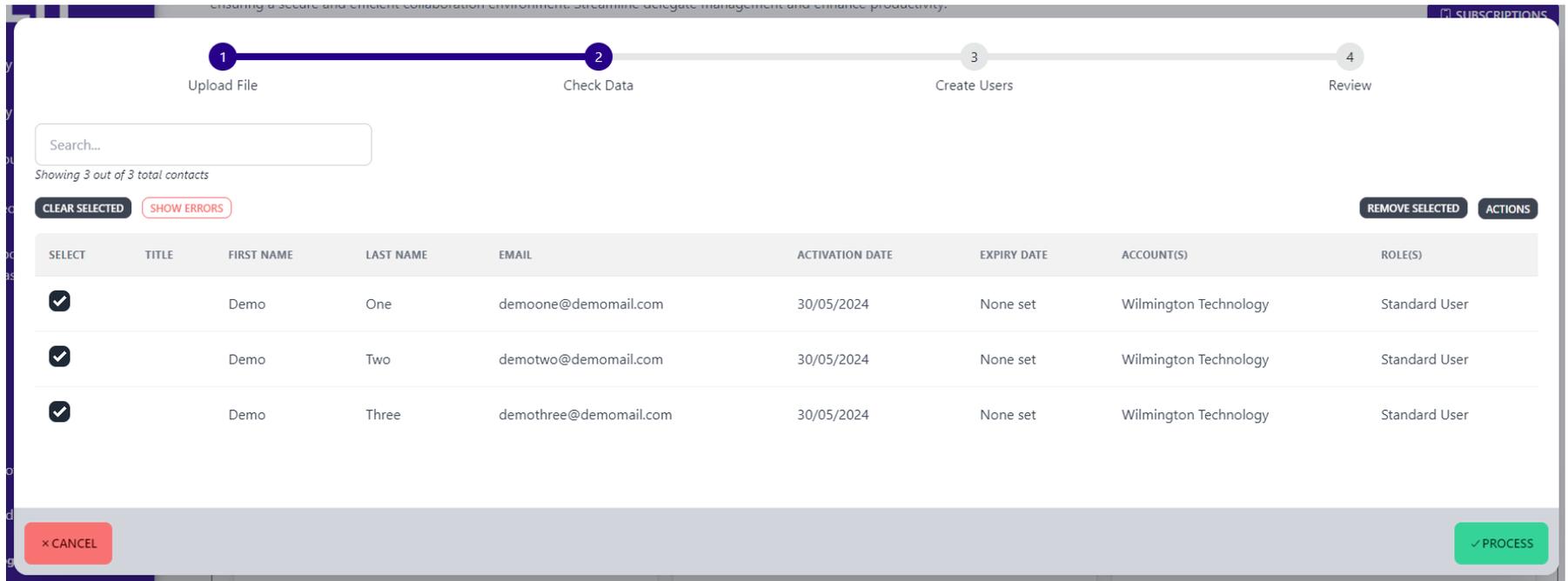
- Click **Upload Users** located in the top right corner of the page
- (If you do not already have your template prepared) Click **Download Template** and complete fields
  1. Title (optional)
  2. ContactFirstName (required)
  3. ContactLastName (required)
  4. ContactEmail (required)
  5. ActiveDate (today's date)
  6. ExpiryDate (leave blank)
- Click **Choose File** and select the completed template.



## 2. Check Data

- Accounts and roles will be missing by default. You will need to add them for each user, or all users via the **Select All** and **Actions** options.
- Select the required users or click **Select All**
- Click **Actions**
- Click on the role to assign to those selected
- Click on the account to assign to those selected





3. Create Users
  - Click Process
4. Review
  - Screen is displayed to show you the success of user creation.

The new users will be visible within the People page, and an email will be sent to the email addresses provided containing Okta login details to the Hub.

## Assigning Qualifications and Courses

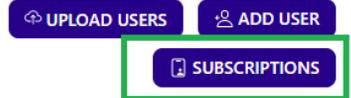
Qualifications with multiple, instructor-led events (Advanced Certificates, Diplomas and Postgraduate Diplomas) require Learning Pathways to be assigned.

Qualifications and courses at Certificate, Specialist Certificate and Essentials Workshop level require Events to be assigned.

On the People page, click on **Subscriptions** to access the Subscriptions page.

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Click on **Select Delegates**.

# Assign Learning Paths

PATH DETAILS

DELEGATES

## STEP Advanced Certificate in Principles of International Taxa...

📅 Start date: 28/05/2024

📅 End date: 28/05/2025

📖 Courses: 6

👤 1 places available

👤 SELECT DELEGATES

Select the colleagues you wish to assign a place on the Learning Path or Event booking.

## Subscriptions

✔ You have no Subscriptions Available

John Doe

👤 David Test David Test ✓

1 selected contacts

👤 David Test David Test ✕

✕ CANCEL

✔ SAVE CONTACTS

👤 1 places available

When you have finished selecting the delegates to add, click **Save Contacts**.

**Subscriptions**

✓ You have no Subscriptions Available

John Doe

David Test David Test ✓

1 selected contacts

David Test David Test ✕

✕ CANCEL

✓ SAVE CONTACTS

1 places available

To assign the places to the selected delegates, click the process button.

1 places available

**STEP Advanced Certificate in Administration of Estates - En...**

Start date: 31/05/2024

End date: 31/05/2025

Courses: 5

1 places available

SELECT DELEGATES

PROCESS (1) LEARNING PATHS

The available number of places will be reduced in line with your selection. If all available places have been consumed, you will see no available Learning Paths and or Event bookings.

The users assigned a Learning Path or Event booking will receive a booking confirmation email and will find learning paths in the **Book Virtual Classroom** page, from where they can select their own preferred classroom times and Event bookings will be visible in the **Course Calendar** feature.