Online Training Administrator's Guide

www.in2vate.com/cbs/

CHRISTIAN BROTHERS SERVICES

Risk Management Services

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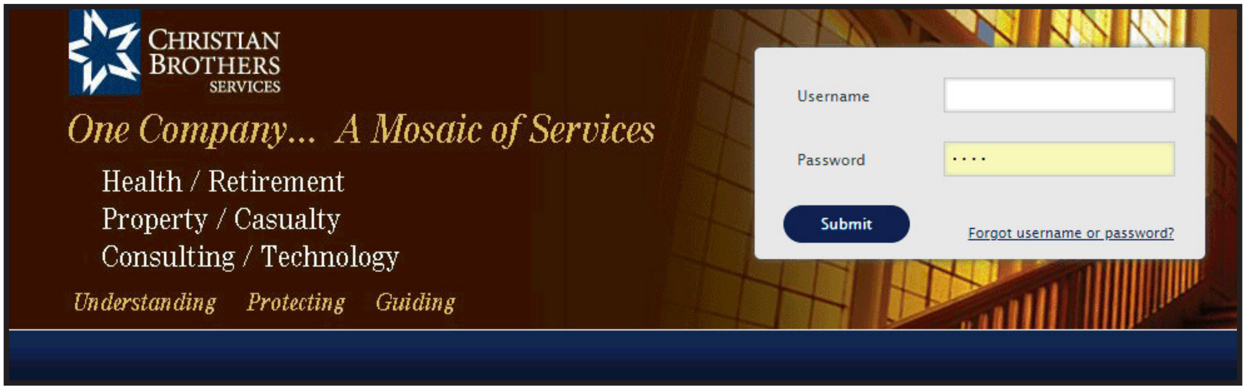
Logging In



1 Visit www.in2vate.com/cbs/ or www.in2vate.com

2 Enter Username and Password. Notice: Username and Password are case sensitive.

3 Hit the “Submit” button.

4 If you have forgotten your Username and/or Password, hit the “Forgot Username or Password?” link and complete the fields. Notice: Fields are case sensitive.

Update Your Account / Change Password

1 Once logged into the platform, select the “Update My Account” link at the top right.

2 Complete the updates then hit the “Save” button.

Adding Users

Add users individually or complete a user upload.

Adding Users Individually

1 Login at www.in2vate.com/cbs/

2 Go to the "Administration" tab.

3 In the left hand menu, click "Users."

4 On the User List screen, click the "Add New User" button at the top.

5 Complete the new user fields. Required fields are user ID (recommend email address), First Name, Last Name, Email and Password. If no email input "noaddress@example.com" in the email field.
Notice: Sites and Departments need to be set up prior if necessary for new user.

6 If you wish to email the user their account information select the "Send Account Information" box. Emails from the platform will come from "system@in2vate.com." If the user does not receive their account information to their inbox they will want to check their JUNK folder.

7 Hit "Continue" when all fields are complete.

8 Select an existing Profile or create a new Profile for the user.

  a. User Permissions are controlled by Profiles. By default your platform will have the Default and Administrator profiles.

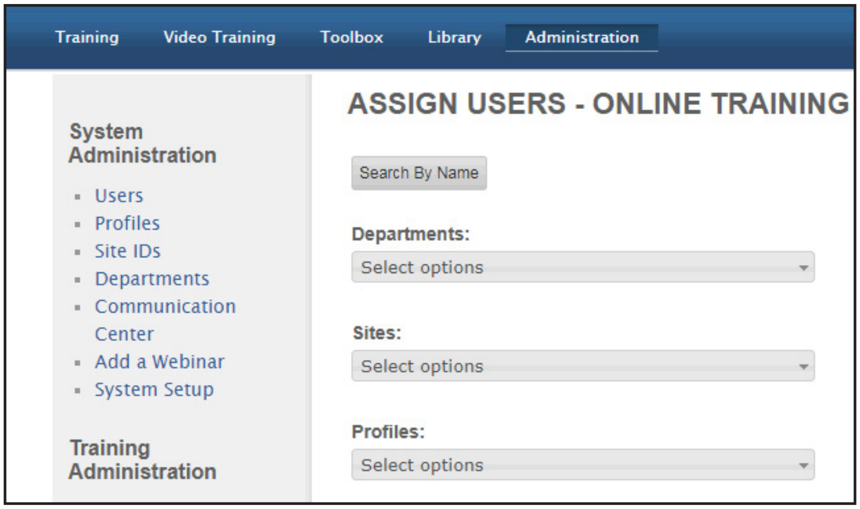
  b. As an Administrator you have access to all the resources available.

  c. Select an available Profile and available resources for that Profile will be ticked in the lists on screen.

  d. Create a new Profile by typing a name and ticking permissions for resources the Profile will have access to.

9 Click the "SAVE" button at the bottom of the page. Your user will be added to the platform. You will be returned to the user list.

5 Assigning Online Modules



1. Login at www.in2vate.com/cbs/
2. Go to the "Administration" tab.
3. Under "Quick Links" on the page click "Assign Online Training."
4. Using the available drop downs select one or more Departments, Sites or Profiles to assign training to.
5. –OR- search users by first name or last name using the "Search by Name." Below the search results will appear. Tick each users name. If you would like to add more individual users, click the "Save and Add More Users" button.
6. Once you have built your list of users click "Save and Continue."
7. This page will show your list of all selected users. Finalize the list by clicking the "Continue" button.
8. At the top of the page the number of users you have selected will show. Make sure this number is correct.
9. A list of available training modules will appear by category. Tick the box(es) next to the training you would like to assign. A due date of two weeks from the current date will auto-populate. If you choose, you may enter a different date.
10. After selecting training modules, scroll to the bottom and use the default selection "Do Not assign the module again" or click "Assign the module again" if you are wanting to assign the module to individuals who have previously completed any of the programs currently being assigned.
11. Click Assign Training "Assign Training."
12. You will see a confirmation that the training has been assigned.

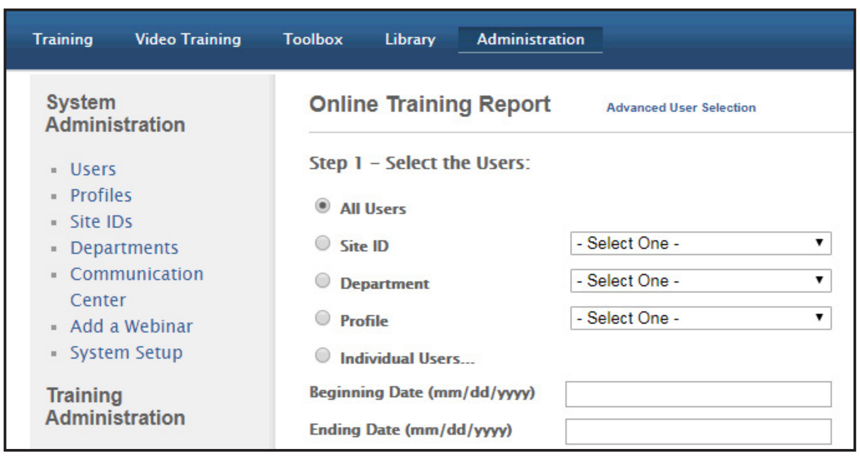
Training Reminder Notification

This reminder is automated and will be sent to users who have upcoming due dates for modules. Administrators can turn this feature on and set how many days prior to a due date a user is emailed a reminder. You may also turn on completion emails for the user or all Administrators on the platform.

Setting Reminder

1 Login at www.in2vate.com/cbs/
2 Go to the "Administration" tab.
3 In the left hand menu, click "System Setup."
4 Click "Training Notification."
5 Select the options from the list.
6 Once your selection or list is made, click "Save" at the bottom.

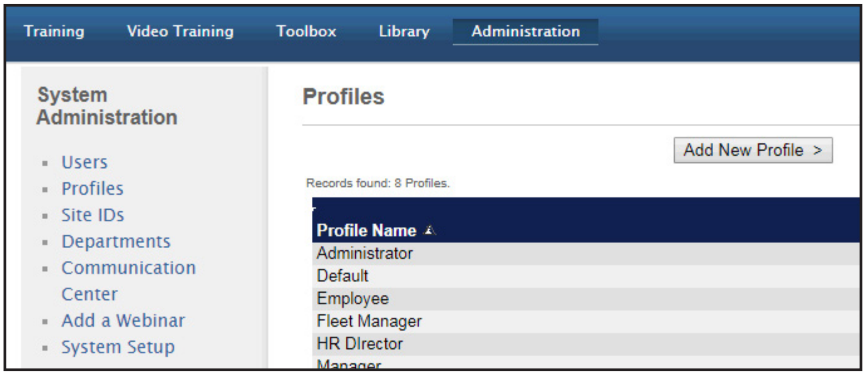
Running Training Reports



How to Run Training Reports

1 Login at www.in2vate.com/cbs/
2 Go to the "Administration" tab.
3 Under "Quick Links" on the page click "Online Training Report."
4 Identify the group of users you would like to run the training report for. Select only one of the options from the drop downs.
   a. You can also use the "Individual Users" to select a handful of specific users.
   b. Enter a date range to filter the report to a specific time.
5 Once your selection has been made click the "Continue" button.
6 Your training report for all users elected will now appear.
   a. Sort columns by clicking the headers.
   b. Specify the number of results that appear on one page by clicking the dropdown at the bottom.
   c. Export to Excel with more column options, by clicking the "Export to Excel" button at the bottom right of the report.

Profiles



By designating which profile each user will have, the Administrator can control the user's level of access to the platform. The designated platform Administrator is given all of the permissions/rights to the platform. One of those rights is the ability to limit the level of access, or rights, allowed to the rest of the users.

Viewing Profiles and User Rights

1 Login at www.in2vate.com/cbs/
2 Go to the "Administration" tab.
3 In the left hand menu, click "Profiles."
  a. Your platform will automatically have the Administrator and Default profile. These Profiles cannot be edited.
4 To view a profile's rights, click on the profile name. A list will appear of all viewable tabs and available resources.
5 At the top of the page it will list how many users currently have that Profile.
  a. Click this user name to view all users with that profile.
  b. To include inactive users, tick the box "Show Inactive Users."
  c. You may sort the columns by clicking the headers.
  d. View a user's account by clicking the users' name.
  e. Edit the user account from this screen, including the profile.

Add New Profile

1 Login to www.in2vate.com/cbs/
2 Go to the "Administration" tab.
3 In the left hand menu, click "Profiles."
4 At the top click the "Add New Profile" button.
5 Name your profile.
6 Tick the pages and rights for your new profile.
7 Scroll to the bottom of the page and click the "Save" button.

Not every user needs every feature. Some features are best suited for human resources and risk management personnel. Others are more appropriate for front-line managers or supervisors. Still others can be accessible to all users. Take some time to explore the features of the platform to determine which ones you want different categories of employees to have. Then, create profiles that reflect common groups of users within your organization.

See the chart on the next page for examples.

Below is a listing of features that can be selected when creating a new profile:

User Profile: (New)

Profile Name: [ ]

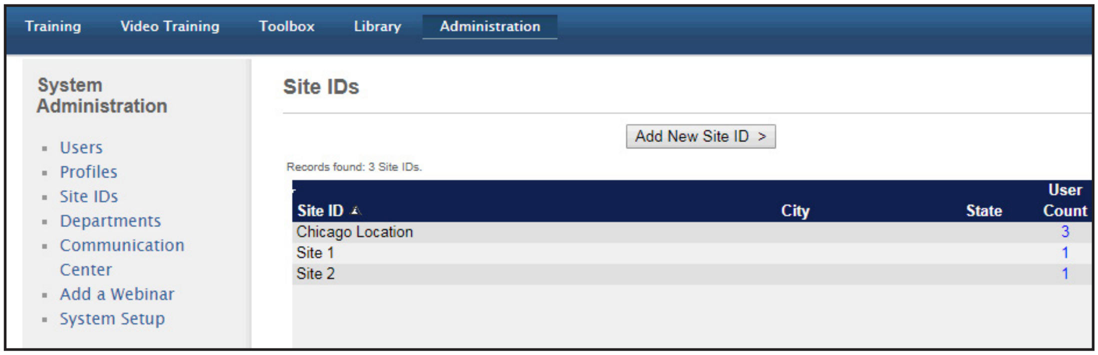
Note:
You must check the box in front of tab if you select items under the tab.

Rights:

- [ ] **Video Training Tab**
  - [ ] Add/Edit training videos
  - [ ] View Training Video logs
- [ ] **Administration Tab**
  - [ ] Accidents Manager
  - [ ] Add/Edit/Delete roles, sites, profiles, departments
  - [ ] Allow to email training reminders
  - [ ] Background check setup
  - [ ] Background checks: Add/edit user background check information
  - [ ] Background checks: View background check information
  - [ ] Communication Center
  - [ ] Custom Form, Policy, and Procedure Manager
  - [ ] Online Training: Assign modules
  - [ ] Reports: Online training reports
  - [ ] Required Documents: View required document information
- [ ] **Library Tab**
  - [ ] ELA Article Library
  - [ ] Workplace Resource
- [ ] **Toolbox Tab**
  - [ ] Custom Forms
  - [ ] Custom Policies
  - [ ] Edit My Information
  - [ ] Help System
  - [ ] HR Self Assessment
  - [ ] Model Forms
  - [ ] User Guide
- [ ] **Training Tab**
  - [ ] Best Management Practices Bulletin
  - [ ] Self Assign Training Modules
  - [ ] Smarter Adults Safer Children
  - [ ] TRAC Training
  - [ ] Web Conferences

Save Cancel

9 Sites and Departments



If you have more than one location or division within your organization, you can set up Sites (or Locations) to logically segment your user accounts. For example, if you have operations in Atlanta, Dallas, and Seattle, you may choose to use city names. Or, if all your operations are in one city, but you have operations at different locations within that city, you may choose to categorize your sites by address or area.

Add New Site

1 Login at www.in2vate.com/cbs/

2 Go to the “Administration” tab.

3 In the left hand menu, click “Sites.”

4 At the top click the “Add New Site” button.

5 Complete the fields.

6 Click “Save” at the bottom of the page.

7 To edit a site, click the site from the list. From this screen, you can make changes, save, inactivate or delete.

8 At the top you can see the number of users with that assigned Site. Click that number to view a list of users.

Departments

If you have several departments within your organization, you can set up the different departments to logically segment your user accounts. For example, your workforce might be divided into the following departments—human resources, research and development and marketing.

Add New Department

1 Login at www.in2vate.com/cbs/

2 Go to the “Administration” tab.

3 In the left hand menu, click “Departments.”

4 At the top click the “Add New Department” button.

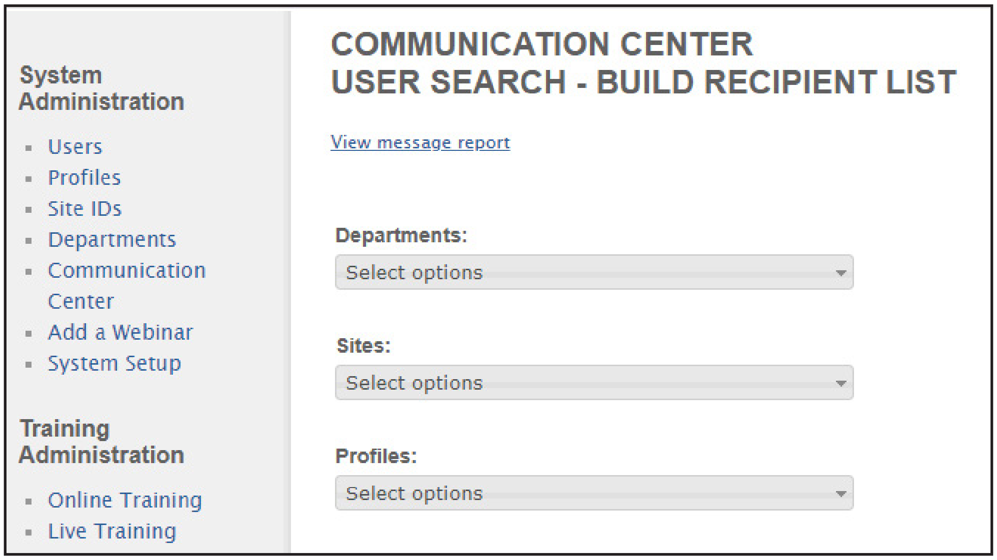
5 Complete the fields.

6 Click “Save” at the bottom of the page.

7 To edit a site, click the department from the list. From this screen, you can make changes, save, inactivate or delete.

8 At the top you can see the number of users with that assigned department. Click that number to view a list of users.

Communication Center



The Communication Center is a messaging tool within the platform. It is not designed to replace your existing email system. Rather, it is intended as a simple way to contact employees who have access to the platform and an email address associated with their user account. For simplicity, messages are received in each user's existing email inbox and on the platform when logged in.

Sending Communications

1. Login at www.in2vate.com/cbs/
2. Go to the "Administration" tab.
3. In the left hand menu, click "Communication Center."
4. Using the dropdowns you can select various and specific Departments, Sites and/or Profiles. You may also use the "Search By Name" to build a list of users.
5. Once your selection or list is made, click "Save and Continue" at the bottom.
6. Click "Save" at the bottom of the page.
7. Complete the fields on the screen.
8. Select if you would like the communication to be email, on the platform only, or both.
9. Tick the "Add login/pwd" to the email to include the users credentials.
10. Hit "Send Message" button. You may view message reports on the Communication Center page.
11. Messages from the Communication Center will appear in the recipient's email inbox as coming from system@in2vate.com.