Brit TEAM Platform Administrator Guide

What is Brit TEAM?

Brit TEAM provides your organization with resources to help manage workplace risk. These resources include online training, informative bulletins, and other resources. This guide will help Administrators of the Brit TEAM Platform manage and use the resources. Brit has also provided a video library of How-To videos for Administrators to learn how the platform functions. Visit the "Brit TEAM Video Library" section of this guide to learn more about this resource.

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Setting Up the Platform

Welcome to your Brit TEAM Platform! Brit TEAM is set up to be customizable in order to meet your organization's needs. We suggest setting up your platform first by determining your "Sites", "Profiles", and "Departments".

An overview of each category is given with their following instructions. Sites, departments, and profiles are useful when 1) you assign training, 2) need to run a report, and 3) when you use the Communication Center.

You can filter your training assignment list or report data by site, department, role, and/or profile. The alternative is to search each individual user and build the list one-by-one. Taking the time to accurately set up these categories will keep your platform simple to manage and save time.

A. Setting Up 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.

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.

*Profiles are necessary in order for a platform to function. Every platform comes with 2 pre-loaded profiles named "Administrator" and "Default". These cannot be deleted or altered.

See the chart on the next page for examples.

Administrator	HR/Risk Manager	Front-Line Manager	Employee/Training
Platform Tabs Toolbox Training Library Products & Services Sponsors Administration	Platform Tabs Toolbox Training Library Products & Services Sponsors	Platform Tabs Toolbox Training	Platform Tabs Toolbox Training
Platform Features Online Training Self Assessment Best Practices Knowledge Base Communication Center Policies Forms Employee Protection Line® Useful Links Edit User Information Administration	Platform Features Online Training Self Assessment Best Practices Knowledge Base Policies Forms Employee Protection Line® Useful Links Edit User Information	Platform Features Online Training Policies Forms Useful Links Edit User Information	Platform Features Online Training Edit User Information
You would might this profile to the person(s) within your organization who you've selected to administer the platform—e.g. add/edit Users, assign training to Users, run training reports. All features, including platform administration are enabled.	You might assign this profile to the individuals within your organization who are responsible for managing your human resources. This profile is also ideal for upper management. All features are enabled except for platform administration.	You might assign this profile to the individuals within your organization who manage one or more employees. Online training Courses, training bulletins, as well as access to policies and forms are enabled.	You might assign this profile to the individuals within your organization who do not have management responsibilities. Online awareness training and other limited features are enabled.

How to Set Up a Profile:
1. Log in.
2. **A. If on the homepage:** Click on "Profiles" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "profiles" under "System."
3. At the top, click the "Add New Profile" button.
4. Name your profile.
5. Tick the "rights & permissions" for your new profile.
6. Scroll to the bottom of the page and click the "Save" button.

How to Edit a Profile:
1. Log in.
2. **A. If on the homepage:** Click on "Profiles" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "profiles" under "System."
3. Click the desired Profile from the profile list.
4. From this screen, you can make changes, save, or delete.
5. At the top you can see the number of users with that assigned Profile. Click that number to view a list of users with that profile.

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B. Setting Up Sites

If you have more than one location or division within your organization, you can set up *Sites* 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. Some organizations have a campus with multiple buildings each designated as a unique site.

*Sites are not required for a platform to function but are highly encouraged if relevant to your organization's structure and size.

How to Add a New Site:
1. Log in.
2. **A. If on the homepage:** Click on "Sites" in the "Administration" box in the bottom left of the home page.
    B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Sites" under "System."
3. At the top click the "Add New Site" button.
4. Complete the relevant fields.
5. Click "Save" at the bottom of the page.

How to Edit a Site:
1. Log in.
2. **A. If on the homepage:** Click on "Sites" in the "Administration" box in the bottom left of the home page.
    B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Sites" under "System."
3. Click the desired site from the site list.
4. From this screen, you can make changes, save, inactivate, or delete.
5. At the top you can see the number of users with that assigned Site. Click that number to view a list of users at that site.

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C. Setting Up Departments/Roles

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—HR, research, and marketing. Further, you might have multiple employees who occupy the same *role* within a department. For example, Associate Marketer might be a role that 10 employees within the Marketing department hold, or maybe you have 5 interns.

*Departments and roles are not required for a platform to function but are highly encouraged if relevant to your organization's structure and size.

How to Add New Department/Role

1. Log in.
2. **If on the homepage:** Click on "More" in the "Administration" box in the bottom left of the home page.
   Then/or if off of the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Roles" or "Department" under "System."
3. In the left column menu, click "Departments" or "Roles."
4. At the top click the "Add New Department" or "Add New Role" button.
5. Complete the fields.
6. Click "Save" at the bottom of the page.

How to Edit a Department or Role:

1. Log in.
2. **A. If on the homepage:** Click on "More" in the "Administration" box in the bottom left of the home page.
   Then/or if off of the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Roles" under "system"
3. Click on department or role in the left-column menu.
4. To edit, click the department or role from the list. From this screen, you can make changes, save, or delete.
5. At the top you can see the number of users with that assigned department or role. Click that number to view a list of users.

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D. Adding Users to the Platform

Each individual accessing Brit TEAM should have their own *user account*. This is their portal to Brit TEAM's services and is accessed via a login page using their unique username and password. User accounts are created in two ways—uploading a .csv file to create multiple accounts at once or adding users individually. Users should only have *one* account. You can run a User Report to export your user list to excel to help ensure no duplicate accounts are created.

*Sites and Departments/Roles need to be set up prior to adding user accounts if you plan to utilize these categories. Profiles can be set up in the process of adding individual users, but are ideally set up ahead of time within the "Profile" settings (see *To Set Up a Profile*).

Exporting a User List

1. Log in.
2. **A. If on the homepage:** Click on "Users" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Users" under "System."
3. Click on the "Users" link.

4. Click on "View User Reports" link.
5. Click on "Customized Report" link.
6. Select "All Users".
7. Click "Continue"
8. Check the box next to the information to include in the report.
9. Click "Export to Excel" at the top or "Generate Report" at the bottom.

Completing a User Upload

1. Log in.
2. **A. If on the homepage:** Click on "System Setup" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "System Setup" under "System."
3. Click "User Upload".
4. This opens the user upload page.

Follow the instructions on the page to complete a user upload. Having Sites, Departments, Profiles, and Roles set up ahead of time are necessary in order to assign your users to these categories. This process cannot be reversed. If user accounts are accidentally created, contact Helpdesk to delete them.

Adding Individual Users

1. Log in.
2. **A. If on the homepage:** Click on "Users" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Users" under "System."
3. On the User List screen, click the "Add New User" button at the top.
4. Complete the new user fields. Required fields are user ID (recommend email address), First Name, Last Name, Email, and Password.
5. If you wish to email the user their account information, select the "Send Account Information" box.
6. Hit "Continue" when all fields are complete.
7. Select an existing Profile from the dropdown menu or create a new Profile.
   a. User Permissions are controlled by Profiles. By default, your platform will have the Default and Administrator profiles.
   b. Learn more about the Profile setting on pages under heading "Setting Up Profiles".
   c. After selecting an available Profile from the dropdown menu, resources for that Profile will be automatically ticked in the list of rights and permissions on screen.
   d. Create a new Profile by typing a name for the profile and ticking permissions for resources the Profile will have access to.
8. 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.

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Administering the Platform

Your organization is administered by an "Administrator" or team of administrators at your organization. Administrators are users who have their Profile set to "Administrator", and therefore have every level of access to the platform. All administrative functions fall under the "Administration" tab on your horizontal menu.

E. How to Assign Training Modules

1. Log in.
2. **A. If on the homepage:** Click on "Assign Online Training" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Online Training" under "Training." Then click on "Assign Online Training Courses."
3. This opens the list builder page. There are 2 ways to build a list (see *a* or *b* below).
   a. By Sites, Profiles, Departments, &/or Roles:
      i. Using the available drop downs, select one or more Departments, Sites, Profiles, or Roles to assign training to.
      ii. Click "Search Now" to display all users you have selected.
      iii. You can uncheck any individuals you would like to leave out.
      iv. You can save this specific grouping of users and give it a name.
      v. You may click "save and add more users" to do so.
      vi. If you are happy with the list, click "save and continue".
      vii. This allows you to audit the list one last time.
      viii. Click "Continue" if you are happy with the list.
      ix. This takes you to the assignment page.
   b. By Individual: Search users by first name, last name, or email address by using the "Search by Name" button.
      i. All User will appear alphabetically in the left side box
      ii. Scroll to find the users you are looking for, or use the search tool on the top
      iii. Once they are highlighted, click > to add them to the "Select Users" box
      iv. You can remove any user from the right side, by highlighting them and clicking <
      v. You can also add all from selected by using "Add All" or start over by clicking "Remove All"
      vi. Use Undo and Redo to edit the last action performed
      vii. Once your list is complete, click "Continue"
      viii. Click "Continue".
      ix. This takes you to the assignment page.
4. Once you reach the assignment page, a list of available training modules will appear by category. Tick the box(es) next to the training you'd like to assign.
5. A due date of two weeks from the current date will auto-populate. You may enter a different date.
6. After selecting training modules, scroll to the bottom and notice two options to "Assign the module again" or "Do NOT assign the module again". Choose which best suits your scenario.
   a. Some modules may only need to be taken once. Other modules may need to be taken on a reoccurring basis.

b. If you select "Do NOT assign the module again", then the system will only assign the module to those in your list who have *never* taken it before.
c. If you select "Assign the module again", then the system will assign the module to all users in your list regardless of whether they have previously completed the module.
7. You will see a confirmation that the training has been assigned, including the number of assignments made.

F. How to Run a Training Report

1. Log in to Brit TEAM.
2. **A. If on the homepage:** Click on "Assign Online Training" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Training Reports" under "Reports." Then click on "Online Training Reports."
3. From here you can choose many ways to run a report by. Once you have chosen your desired group, click "continue"
4. Click "Customized online training report".
5. Choose your users—refer to page 8 with help on how to choose by individual users.
6. Click "Continue".
7. Check the box next to the columns of information to include in the report.
8. Click "Generate Report".
9. Your results will appear—you can view on the webpage, or export to Csv, Excel, a PDF, or print directly from the screen.

G. How to Unassign Training Modules

The training system recognizes when a module is already assigned to a user and has not been completed. This happens often when users are assigned a module and do not complete it. The module will stay assigned to the user for years until it is either completed or unassigned. The system will not assign a module to a user if the module is currently assigned. In order to successfully assign training modules, old assignments of that module must be *unassigned*.

1. Log in to your Administrator account
2. **If on the homepage:** Click on "More" in the "Administration" box in the bottom left of the home page.
   Then/or, off of the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Online Training" under "Training."
3. Click the "Unassign Online Training Courses" link.
4. Use this screen to unassign necessary modules.

*Some modules that need to be unassigned may not show up here. If a module has been started by the user at any point, the module is seen by the system as "in progress". Administrators cannot unassign "in progress" modules and must extend their request to the Helpdesk to unassign these modules.

H. Where to Find a List of all Overdue Modules

1. Log in to your Administrator account
2. **If on the homepage:** Click on "More" in the "Administration" box in the bottom left of the home page.
   Then/or, off of the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Admin Home."
3. On this main page, locate the "Courses Overdue" area.
4. Click on the number next to "Courses Overdue".
5. This list shows all courses overdue on the platform.
6. This list can be copied and pasted into Excel if needed.

I. How to Provide Usernames and Passwords

Administrators do not have access to see a user's password but can provide the user with that information.

1. Log in to your Administrator Account
2. **A. If on the homepage:** Click on "Users" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Users" under "System."
3. Search for the user in the user list.
4. Click on the user's name to open account settings.
5. Locate the email field.
6. Make sure the user has a valid email address entered & any changes are saved.
7. Click the "Email Account Info" link.
8. A feedback message will verify that "Account information has been sent".
9. The user will receive this email shortly and may need to check their spam or junk folder.

J. How to Use the Communication Center

The Communication Center allows you to communicate with users through email, by posting a system message, or both.

1. Log in to your Brit TEAM Administrator account.
2. **If on the homepage:** Click on "More" in the "Administration" box in the bottom left of the home page.
   Then/or, off of the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Communication Center" under "system"
3. Choose your audience—filter your audience or choose all users.
4. Click "Search Now"
5. Your list will display at the bottom of the page. You can uncheck users to exclude.
6. Click "Save and Continue".
7. Audit your list and make any changes.
8. Click "Save and Continue".
9. Enter your Subject Line (max 75-character limit including spaces).

10. Enter your message in the message box.
11. Add an expiration date if relevant.
12. Choose email and/or system message format to send the communication.
13. Check the box "Add login/pwd" if you would like the system to automatically send users their individual login information.
14. Click "Send Message".

K. How to Merge Duplicate User Accounts

The Brit TEAM system works best when each user only has one account. If a user has 2 accounts with records on each account, you can merge the 2 accounts into one to consolidate the accounts into one.

1. Log in to your Administrator Account.
2. **A. If on the homepage:** Click on "Users" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Users" under "System."
3. Search for the user in the user list.
4. Click the User's name to open account settings.
5. Above the "User ID" field, notice the message that reads "This is a potential duplicate account."
6. Click the link to the right that says, "See Potential Matches".
7. The system will display account information for any potential duplicate accounts.
8. Check the box next to the duplicate account(s).
9. Click "Continue with merge process".
10. Choose which account to keep as the primary account—the system will keep the login information and settings given to this account.
11. Check the boxes next to all training records associated with the other account in order to keep the records. No records will be listed if none are associated.
12. Click "Merge records…" to finish.

L. How to Inactivate Users

Inactivate user accounts for those who are no longer at your organization so the user cannot log in, does not receive emails, and does not appear in your user list. User accounts are not deleted except for special occasions in order to keep records intact.

1. Log in to your Administrator Account.
2. **A. If on the homepage:** Click on "Users" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Users" under "System."
3. Search for the user in the user list.
4. Click the User's name to open account settings.
5. Locate the "Account Status" field.
6. Use the dropdown to change the status from "Active" to "Inactive".
7. Click "Save".

M. How to Set Up/Edit System Training Notifications.

There are three automated training notification options to 1) send users a reminder to complete modules up to a week before a module is due, 2) to email the user a confirmation upon completing a module, 3) and to email Administrators upon completion of users' modules.

1. Log in to your Administrator account.
2. **A. If on the homepage:** Click on "System Setup" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "System Setup" under "System."
3. Click the "Training Notifications" link.
4. Check the box next to notifications to turn them on—edit as desired.
5. Click "Save" at the bottom.

N. How to Run a User Report

User reports can be exported to Excel. They can be used to sort and filter by certain data to allow you to audit your user list quickly.

1. Log in to your Administrator Account.
2. **If on the homepage:** Click on "More" in the "Administration" box in the bottom left of the home page.
   Then/or, off of the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "User Reports" under "Reports"
3. Click "Customized Report".
4. Filter the users you would like to export or select all.
5. Select the fields of information to display.
6. Select a format or exporting preference.
7. Click "Generate Report".

O. How to Update a User's Email Address or Account Information

1. Log in to your Administrator Account.
2. **A. If on the homepage:** Click on "Users" in the "Administration" box in the bottom left of the home page.
   B. If not on the homepage: Click on the Menu tab ([+menu]), click on "administration," then click on "Users" under "System."
3. Search for the user.
4. Click on the user's name to open account settings.
5. Locate the desired field—you can update email, site, department, role, name, and more.
6. Make updates.
7. Click "Save" at the bottom.

Frequently Asked User Questions

P. User Cannot Log In

- Make sure the user has accurate login information.
- Make sure the user is accurately typing login information.
- Make sure the user is aware passwords are case-sensitive.
- Make sure the user is logging in at the right portal.
- Make sure the user's account is created/active in the user list.
- Re-send the user their login information (see *Providing Users' Username and Password*)
- If the problem is not solved, contact Helpdesk for support.

Q. Password Recovery Failure

- To resolve, manually send the user account information.
- To prevent in the future, search user list for duplicate accounts.
- Merge duplicate accounts for user.
- Make sure user does not share the same email address with other users.
- Multiple accounts using the same email address causes password recovery not to function.

R. User's Training Module Won't Start/Open—Blank Screen

1. Some modules are not compatible with smartphones and tablets – make sure the user is on a laptop or desktop computer.
2. Use one of the following browsers: Google Chrome, Microsoft Internet Explorer, Apple Safari, Microsoft Edge and *avoid* Firefox.
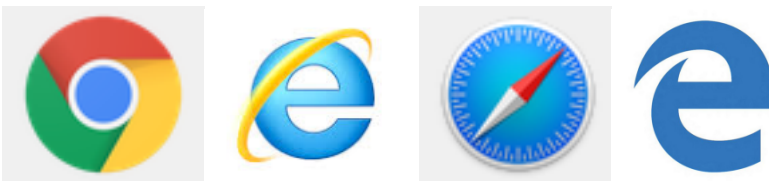
3. Next, instruct user to try a different browser on their computer if one is available.
4. If that does not work, update Adobe Flash Player.
5. After successfully updating Adobe Flash Player, start the module again.
6. If you are still experiencing issues, contact Brit TEAM Helpdesk at 800-322-1420 or Helpdesk@britteam.com.

S. How to Update Adobe Flash Player

1. Open a new webpage (avoid Firefox).
2. Go to this link → https://helpx.adobe.com/flash-player.html
3. This will open Adobe's instructions.
4. See *step 2* of Adobe's instructions to download Flash Player--click the hyperlink (underlined in blue).
5. This opens the download page—click "Download Now".

6. The Adobe Flash Player Installer will download to your browser.
7. Locate and open the downloaded installer--This will open the Flash Player file.
8. Double-click on the Flash Player file.
9. Click "open" or "allow" on any messages that may appear.
10. Agree to the Terms and Conditions.
11. The installation will begin and display a loading bar to show progress.
12. When the bar finishes loading, your Flash Player has been updated.
13. If the module still does not open, there is a chance that Flash was downloaded to the computer, but not fully installed on the browser. To check and make sure Flash was successfully updated, refer to Step 5 of the instructions on the link provided above.

*Adobe Flash Player update process varies depending on your computer's settings and may not match exactly as outlined above (browser and operating system).

T. User Does not See Training Modules

1. The user might not be logged in—the user is logged in if they see their name and organization displayed at the top right corner of their page.
2. When logged in, click on the "Training" tab to see modules.
3. If a message displays that says, "No modules assigned", then modules must be assigned to user.

Here's some quick definitions.
- **Platform**: Your organization's place on Brit TEAM's Online System. This includes settings that broker our services to your organization, the storage that keeps records, and the location where user accounts are housed.
- **User Account**: A unique account for an individual user that must be accessed by that user via a username and password. This is where an individual takes training and accesses any Brit TEAM services available to them.
- **Profile**: A profile is a *setting* on a user account that determines which rights and permissions a user can access upon logging in to their account.
- **Rights/Permissions**: A right/permission is the individual elements brokered by a user's Profile settings. Some examples of individual rights/permissions that can be turned on an off are:
  o access to the "Training" tab to complete modules.
  o access to the BMP bulletins streams.
  o access to the "Administration" tab.
  o the ability to assign training modules.
  o access to HR resources in the "Toolbox" tab.
- **Tab**: "Tabs" are the main menu displayed horizontally across the bottom of a user's account that act as a gateway to the resources within that tab. Examples of Brit TEAM's tabs are:
  o the "Training" tab
  o the "Toolbox" tab
  o the "Administration" tab
- **Bulletin**: A bulletin is a regularly updated stream of articles geared towards different audiences that provide professional development and awareness on various topics. These bulletins are typically geared towards supervisor/manager/HR personnel, and C-suite individuals, and can be accesses within multiple different tabs.

Resources

U. System Requirements Document

Overview of System Requirements

1. Most modules need to be taken on a laptop or desktop computer to run.
2. Google Chrome, Internet Explorer, Microsoft Edge, and Apple Safari are all reliable browsers to use when accessing modules.
    a. Avoid Firefox.
    b. Mandated Reporter AB1432 Module is incompatible with Microsoft Edge Browser.
3. The most updated version of Adobe Flash Player is ideal.