



West Bend Academy - User Guide

Step-by-step instructions for your online learning environment

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THE BASICS

WHAT IS WEST BEND ACADEMY?

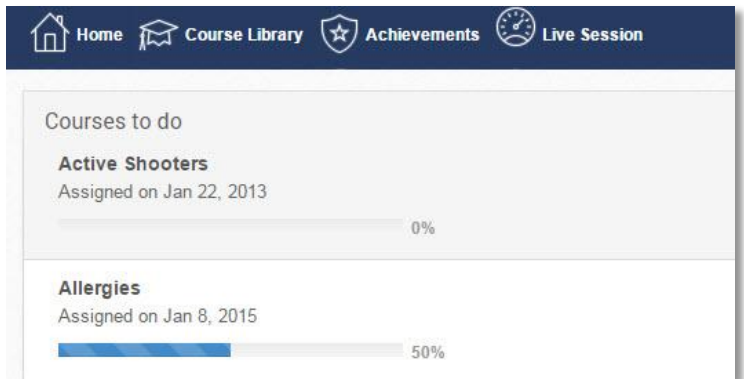
West Bend Academy is a free online training environment designed for West Bend's YMCA customers. All of the coursework is designed by West Bend's Loss Prevention Department to specifically address safety concerns unique to Ys.

The best part of West Bend Academy is that after the initial setup, your Y has total control over [adding users](#), [managing teams](#), generating reports and [assigning coursework](#).

WHAT YOUR STAFF WILL SEE

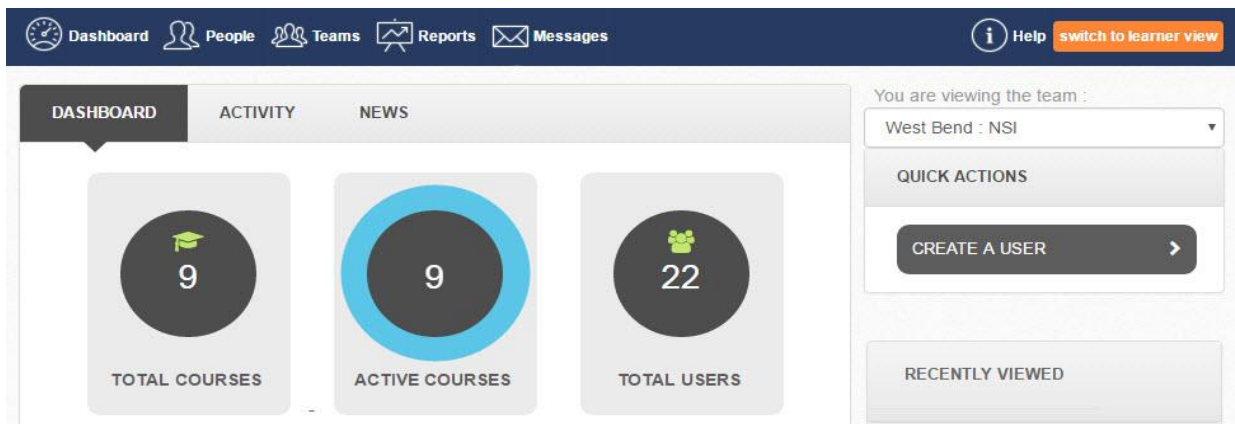
When your staff logs in to West Bend Academy they will see the following screen:

- **Home:** This tab is the default tab and lists all of the courses that have been assigned. On this page the user will be able to see how much of the coursework they've completed and when the coursework was assigned.
- **Course Library:** This tab contains a list of all of the courses available to the user. Generally speaking, this tab will display the same information as the *Home* tab.
- **Achievements:** This tab lists all of the courses that the user has successfully completed. From this tab they can download a PDF copy of their certificates of completion and see when the courses they've already taken will need to be retaken.
- **Live Session:** This tab is not something we are utilizing at this time. Live sessions could become an option sometime in the future.



WHAT TEAM LEADERS WILL SEE

Team Leaders will see an entirely different set of options when they first login to West Bend Academy.



- **Dashboard:** This the default tab for Team Leaders. From this tab you'll see a snapshot of recently viewed teams, courses and people.
- **People:** This is where you'll see a full roster of your team. In addition to the full name and username of each user, you'll see the last time they logged in, whether or not they're a Team Leader, and whether or not they're active in the system. From this tab you can also [add new users to your team](#).
- **Teams:** This tab lists all of the active teams and sub-teams within your organization. Your organization's name will always be listed as the top overall team, with teams and sub-teams listed below that in alphabetical order. From this tab you can also [add new teams and sub-teams](#).

- **Reports:** This tab is where Team Leaders access downloadable reports on the progress of individual users and teams.
- **Messages:** This tab is home to a simple messaging system that can be utilized by your team to communicate with one another.
- **Switch to learner view:** When clicked, this button on the right side of the toolbar, will show a Team Leader how the online training environment appears to general users. Clicking the button again will bring you back to the original Team Leader view.

COURSE STRUCTURE

MODULES

Each Course in West Bend Academy covers a specific training topic. Within each specific Course, users will find several individual Modules. Each Module covers a different aspect of the overall training topic. Modules may be short training videos produced by West Bend, they might be links to news articles or blog posts or they might be links to content created by a third party.

In most instances, users are free to complete the modules in any order they choose. In general, however, we strongly recommend that the modules be completed in the order listed.

EXAMS

Most courses will conclude with a Final Exam. Exams are compiled of fill-in-the-blank, multiple choice, and/or essay style questions. The number of exam questions, and the score required to pass the course, vary from course to course. Some exams may have a specific time limit, and there may also be a limit on the number of times a user can attempt to pass the exam. Additionally, courses have varying timeframes of validity; some only need to be completed once, while others, by default, may need to be retaken on an annual or bi-annual basis.

ADDING NEW USERS

There are two ways to add new users to West Bend Academy: you can add individuals one at a time, or you can import up to 5,000 users using the Bulk Import feature.

ADDING INDIVIDUALS ONE AT A TIME

This is the most straightforward process for adding new users to West Bend Academy. This method works best for smaller organizations, or for organizations that assign online training as part of the employee onboarding process.

To add users one at a time you will need to:

1. Click on the **People** tab.
2. Click on the **Add a new person** button that appears in the right-hand column.
3. Complete the new user's profile:
 - a. **Team:** Select the appropriate team from the drop-down list. We recommend using the default selection, which is the name of your organization. Later on, you can [assign the user to various sub-teams](#).
 - b. **Username:** We strongly recommend using the user's email address as their username. If the user doesn't have an email address, or you decide not to use email addresses as the username, we recommend using a common naming structure for all users. For example, you could consider using a structure such as *[First Name]_[Last Name]* or *[First Initial][Last Name]*.
 - c. **Access Level:** By default, all new users will be added to your team as a Learner. If you would like to allow this new user to have administrative control over your online training team, you may [assign Team Leader credentials](#).
 - d. **Password:** It is only necessary to create a password for a new user if you choose to use something other than an email address as the username. If an email address is used, and the *Send a welcome*

email to this person inviting them to login box is checked, they will be able to create their own password the first time they login.

4. Click *Add Person* to add this new user to your online training team, or click *Add Person & then add another* to immediately begin adding another user.

ADDING USERS IN BULK

For large organizations, or organizations that tend to add dozens of users at one time, using the Bulk Import feature may be the most efficient way to add new users to West Bend Academy. This method requires the use of spreadsheet software like Microsoft Excel, and is most effective if you are comfortable with merging and/or manipulating data.

To add users in bulk you will need to:

1. Click on the *People* tab.
2. Click on the *↑ Import people in bulk* link in the right-hand column.
3. Build a CSV file. You may use the template provided or create your own file from scratch.
 - a. There are three required fields when using the bulk import method: Username, First Name and Last Name. *Read about [creating effective usernames](#) in the previous section.*
 - b. In addition to the three required fields listed above, you may add additional information to individual profiles such as contact information.
 - c. You may also **add users directly to various sub-teams** during the bulk import process. You might, for example, want to add a portion of your new users to the Aquatics team, others to the Child Care team, and others to the Executives team. To do this you will need to:
 - i. Setup the various teams you would like to use.
 - ii. Get each team's unique import code by visiting the team's page, clicking the *Settings* tab, and copying the code listed in the right-hand column. It will look something like: *12345-Aquatics*.
 - iii. Copy the import code into a column in your CSV file labeled *Team1, Team2, ..., or Team5*.
4. Upload your saved CSV file and click *Next*.
5. Continue to follow the prompts and complete the import by clicking the *Import* button.

ALLOWING USERS TO DO SELF-SIGNUP

Instead of having management sign users up one at a time, you can let users sign themselves up. Self-signup relies on unique access codes being setup by West Bend. You would then share these codes with your employees and they can create their own profiles. If you're interested in using the self-signup method please contact Kayla Olson at kolson@wbmi.com.

CREATING TEAMS AND SUB-TEAMS

Teams and sub-teams can be used by organizations interested in keeping groups of people organized efficiently. Teams are important for [assigning coursework](#) to different parts of your organization and [running reports on specific departments](#).

To add teams and sub-teams to West Bend Academy you will need to:

1. Click on the *Teams* tab.
2. To create a first level team, click on your organization's name at the top of the teams list. To create a sub-team (a.k.a. a team within a team), click on the name of the team you would like to add a sub-team to.
3. Click the *+ Add a new team under this team* link in the right hand column.
4. Provide a team name, and, if you'd like, a description of the team, then click *Add Team*.

ASSIGNING TEAM LEADERS

Even for small- or medium-sized organizations having a single West Bend Academy administrator can be a lot of work. Team Leaders are required to add new users, assign coursework, create and manage teams, and track reports

and completion times. All of these duties can often be better accomplished with a group of administrators, rather than a single high-level administrator.

There are two options for promoting users to Team Leaders in West Bend Academy. You can add additional high-level administrators that have total control of every team, user and course, or you can promote users as team leaders for specific groups.

ASSIGNING ADDITIONAL HIGH-LEVEL ADMINISTRATORS

If you would like to delegate some of the responsibility of managing West Bend Academy, you can add additional high-level administrators. These administrators would have all of the same access as you. They would be able to add and delete users, assign Team Leader credentials to other users, assign coursework, create and delete teams and more.

To assign additional high-level administrators, you will need to:

1. Click on the *Teams* tab.
2. Click on your organization's name at the top of the teams list.
3. Find the user that you would like to promote to a high-level administrator, and then click the *Promote to team leader* box located to the right of that person's name.

ASSIGNING TEAM-SPECIFIC TEAM LEADERS

If you would prefer to keep high-level access to a few people while still delegating some administrative duties to others in your organization, you can assign team-specific Team Leader credentials. These users would be able to add and delete users from their specific team, assign Team Leader credentials to other users for their team or sub-teams, assign coursework to their specific team, and create and delete teams within their specific team. They would have no control over other teams within your organization.

To assign team-specific Team Leaders, you will need to:

1. Click on the *Teams* tab.
2. Click on the team that you would like to have a new Team Leader for.
3. Find the user that you would like to promote to a high-level administrator, and then click the *Promote to team leader* box located to the right of that person's name.

REMOVING TEAM LEADER CREDENTIALS

If, for whatever reason, you need to remove Team Leader credentials from a user you will need to:

1. Click on the *Teams* tab.
2. Select the team that you would like to remove the Team Leader from.
3. Click the *X* next to the Team Leader's name under the list of current Team Leaders located in the right-hand column.

ADDING USERS TO TEAMS

Once you've created Users and Teams in West Bend Academy, you can begin adding people to various teams and sub-teams. There are two ways to add people to teams: you can add a single user to multiple teams at one time, or you can add multiple users to a single team at one time.

ADD A SINGLE USER TO MULTIPLE TEAMS

To add a single user to one or more teams, you will need to:

1. Click on the *People* tab.
2. Click on the name of the person you'd like to place on a team.
3. Click on the *Teams* tab listed under their name, not the Teams tab in the main toolbar.
4. Click the *Assign to teams* button in the right-hand column.
5. Select each Team from the list that you would like to assign to this individual user.

6. If you would like to automatically send an email to the user notifying them that they've been added to a new team, keep the box at the bottom of the window labeled *Send email notifications* checked. Otherwise, uncheck the box.
7. Click the *Assign* button.

ADD MULTIPLE USERS TO A SINGLE TEAM

To add multiple users to a single team, you will need to:

1. Click on the *Teams* tab.
2. Click the *Assign people to this team* button in the right-hand column.
3. Select each user from the list that you would like to assign to this team.
4. If you would like to automatically send an email to each user notifying them that they've been added to a new team, keep the box at the bottom of the window labeled *Send email notifications* checked. Otherwise, uncheck the box.
5. Click the *Assign* button.

ASSIGNING COURSEWORK

After you've added users and teams to West Bend Academy, you then must assign coursework. Coursework can be assigned to the entire organization, to a specific team, or to an individual.

ASSIGNING A COURSE TO YOUR ENTIRE ORGANIZATION

Some courses are designed to be of use to an entire organization. Rather than assigning the same course to each individual user, you can assign the course to everyone all at once.

To assign a Course to your entire organization, including all users you might add in the future, you will need to:

6. Click on the *Teams* tab.
7. Click on your organization's name at the very top of the teams list.
8. Click on the *Courses* tab.
9. Click the *Assign courses to this team* button in the right-hand column.
10. Select each Course from the list that you would like to assign to your entire organization.
11. If you would like to automatically send an email to each user notifying them that they've been assigned new coursework, keep the box at the bottom of the window labeled *Send email notifications* checked. Otherwise, uncheck the box.
12. Click the *Assign* button.

ASSIGNING A COURSE TO A SPECIFIC GROUP OF PEOPLE

Some courses will only be relevant to a portion of your staff. To assign coursework to a specific group of people, you will first need to [create a team or sub-team](#).

After creating a team or sub-team, all you need to do to assign coursework to that group is:

1. Click on the *Teams* tab.
2. Click on the name of the team you'd like to assign coursework to.
3. Click on the *Courses* tab.
4. Click the *Assign courses to this team* button in the right-hand column.
5. Select each Course from the list that you would like to assign to this specific team.
6. If you would like to automatically send an email to each user notifying them that they've been assigned new coursework, keep the box at the bottom of the window labeled *Send email notifications* checked. Otherwise, uncheck the box.
7. Click the *Assign* button.

ASSIGNING A COURSE TO AN INDIVIDUAL

There may be instances in which you'd prefer to assign coursework to a single individual.

To assign coursework to an individual:

1. Click on the *People* tab.
2. Click on the name of the person you'd like to assign coursework to.
3. Click on the *Courses* tab.
4. Click the *Assign to courses* button in the right-hand column.
5. Select each Course from the list that you would like to assign to this individual user.
6. If you would like to automatically send an email to the user notifying them that they've been assigned new coursework, keep the box at the bottom of the window labeled *Send email notifications* checked. Otherwise, uncheck the box.
7. Click the *Assign* button.