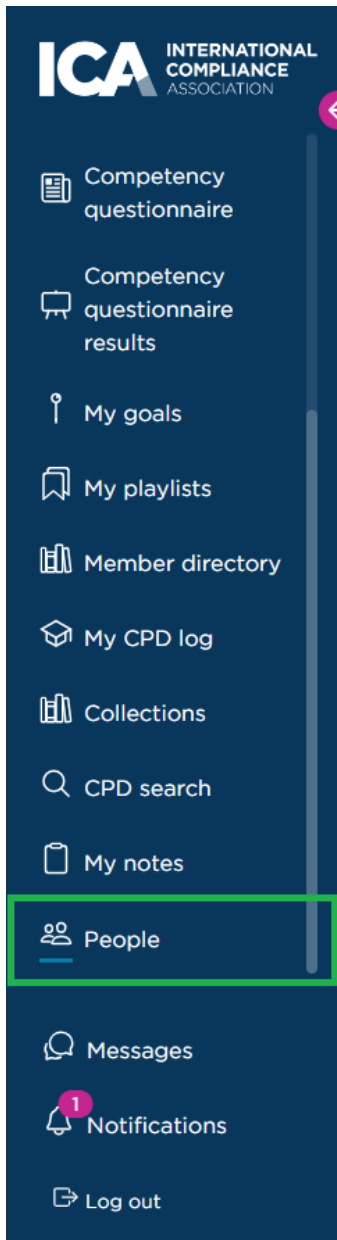


Assigning Membership Subscriptions, Qualifications and Courses



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 membership, qualification or course to are not already ICA members in 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.

UPLOAD USERS ADD USER SUBSCRIPTIONS

Filters ^

John Doe Select Role Active Show expired RESET FILTERS

The image shows a user creation form with the following sections:

- Contact Details:** Fields for First Name (John), Last Name (Doe), and Email Address (john.doe@email.com).
- Roles:** Four roles with toggle switches: ICA Admin (off), Power User (off), Standard User (off), and Super Admin (off).
- Accounts:** A checkbox for "Wilmington plc" which is currently unchecked.
- Start and Expiry date:** Two date selection fields labeled "Select Start Date" and "Select Expiry".

At the bottom of the form are two buttons: "× CANCEL" and "✓ 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 and membership resources, 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. **A user will only be able to access the Learning Hub if they have been assigned a Membership Subscription (see below for instructions), therefore this should be completely immediately after adding the user.**

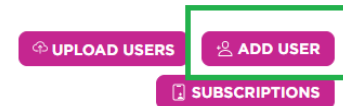
Multiple Users

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

<IAN – PLEASE INSERT CORRECT SCREENSHOT BELOW – GREEN BOX NEEDS TO MOVE>

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.

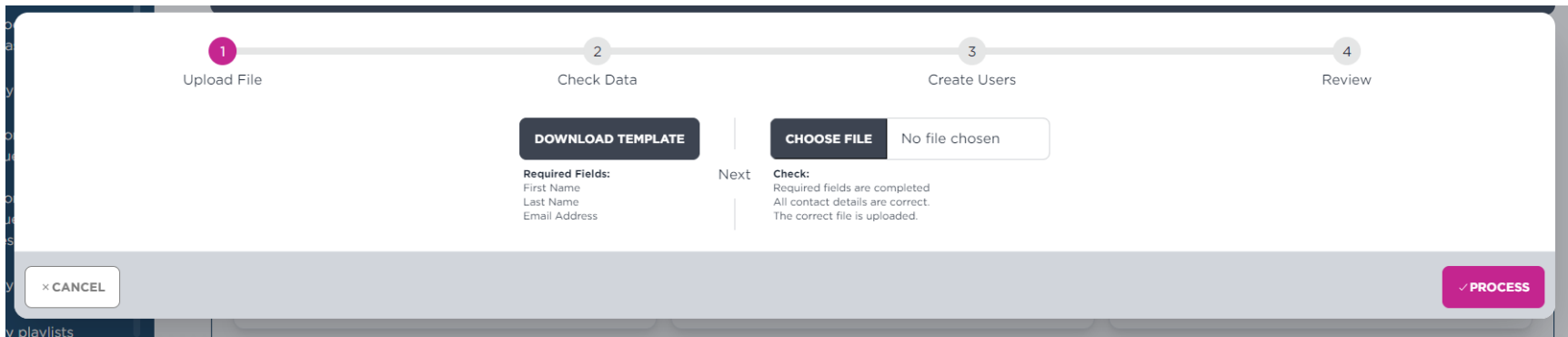


Filters ^

John Doe Show expired

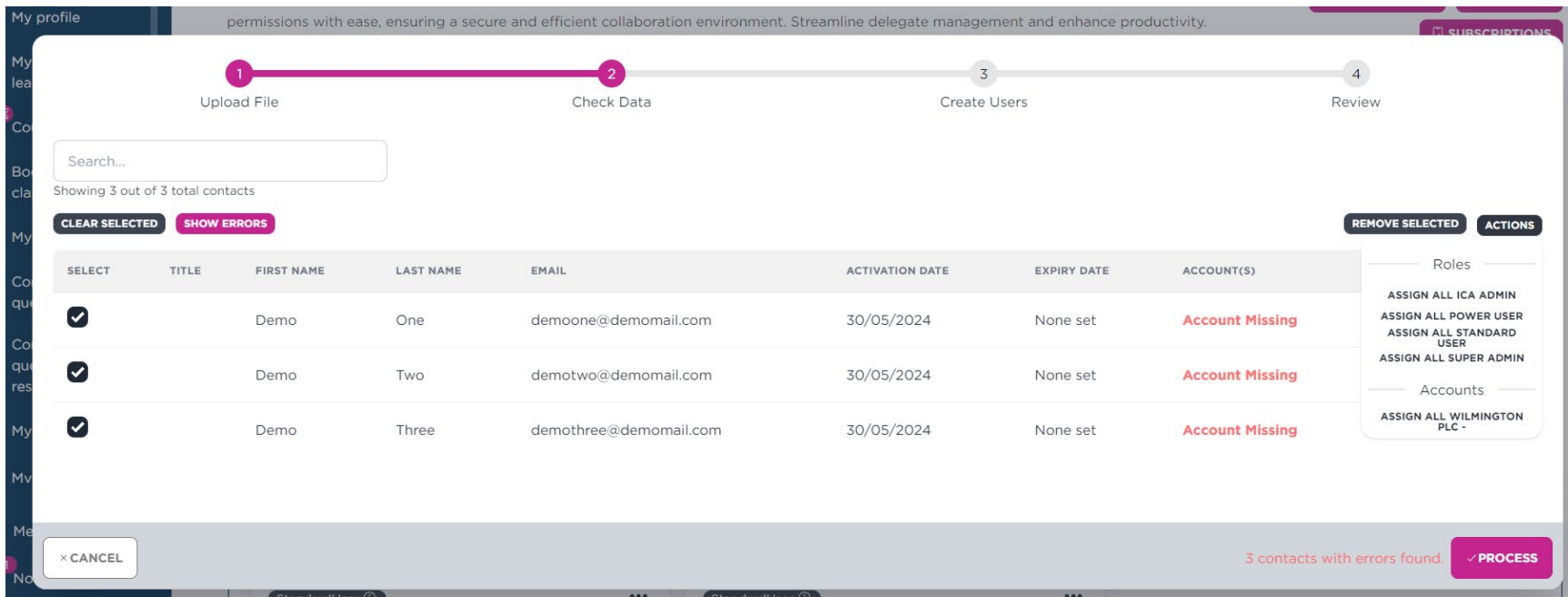
1. Upload Users

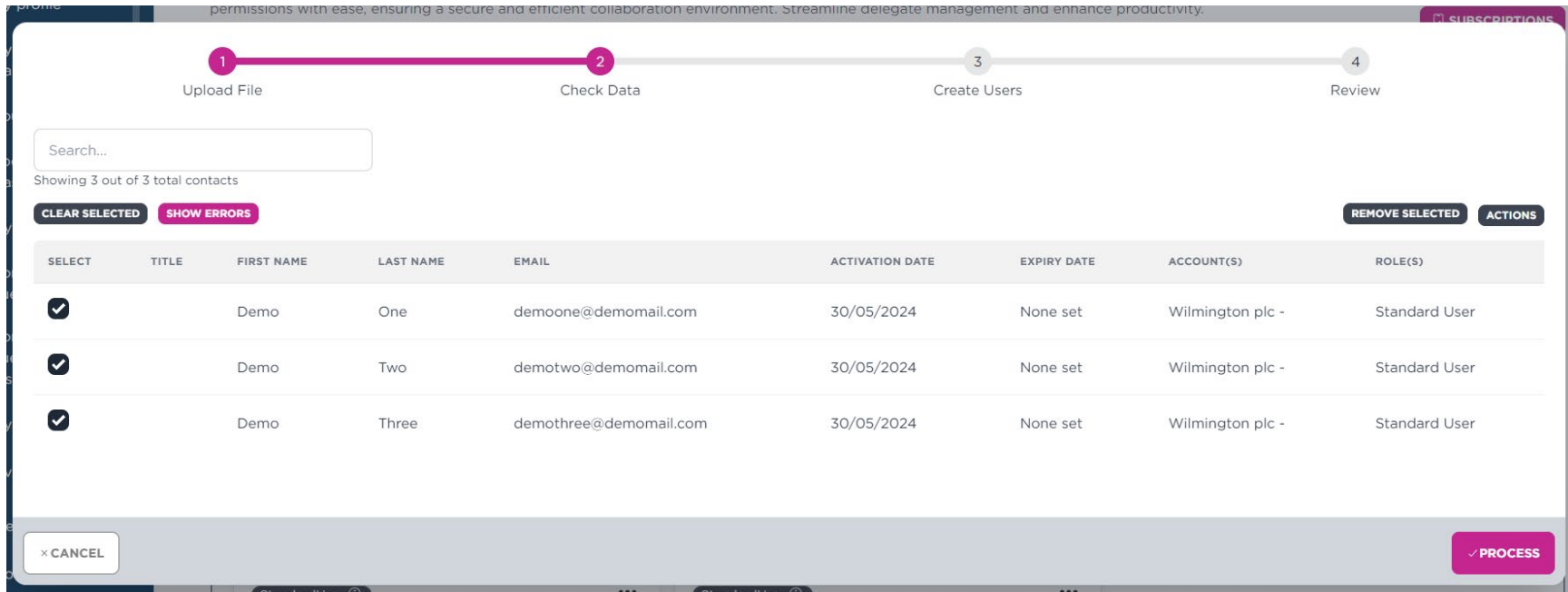
- Click **Upload Users** located in the top right corner of the page
- (If you do not already have your template prepared) Click **Download Template** and complete fields
 1. Title (optional)
 2. ContactFirstName (required)
 3. ContactLastName (required)
 4. ContactEmail (required)
 5. ActiveDate (todays 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
 - o Click Process
4. Review
 - o 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. **Users will only be able to access the hub if they have been assigned a Membership Subscription (see below for instructions) therefore this should be completely immediately after adding the users.**

Assigning Membership Subscriptions

Click on **Subscriptions** on the people page to access the subscriptions page.

People

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UPLOAD USERS ADD USER

SUBSCRIPTIONS

Filters

John Doe Select Role Active Show expired RESET FILTERS

The Subscriptions page will display the number of Membership Subscriptions available to be assigned to your colleagues. Click on **Select Delegates**.

Subscriptions

Available Subscriptions

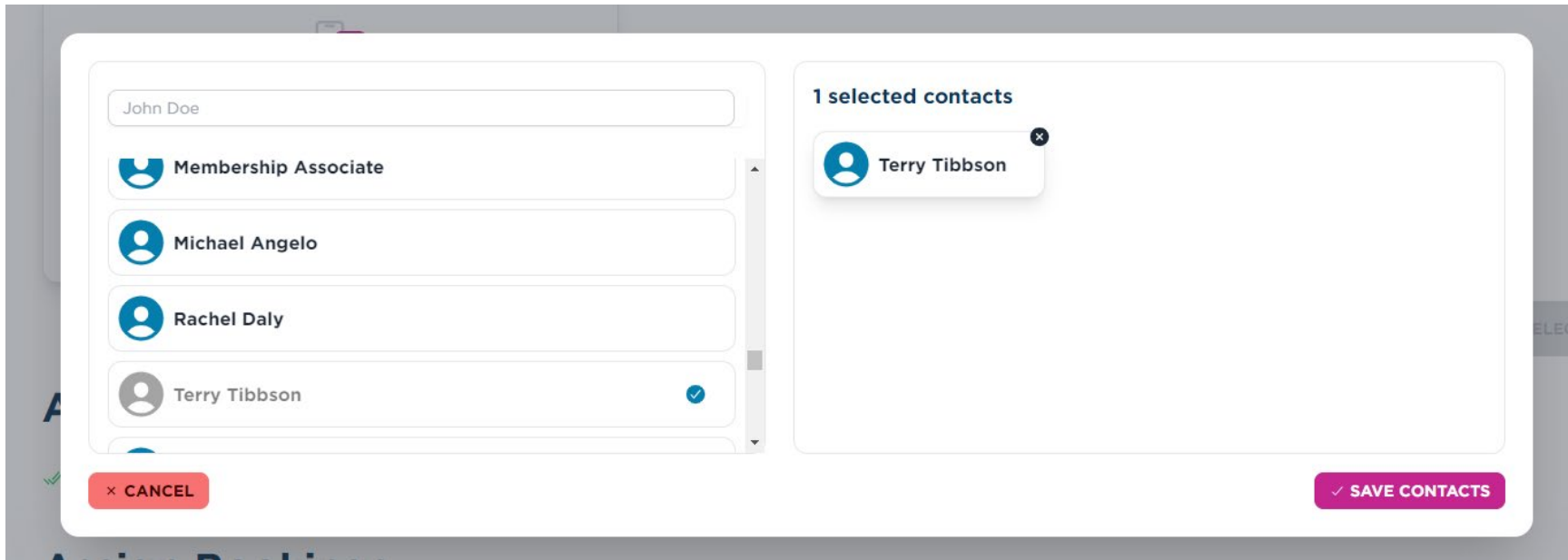
x1

ICA Associate membership (ICT)

Start date: 30/05/2024
End date: 29/05/2025
Available: 1

SELECT DELEGATES


Select the delegates that you wish to add a Membership Subscription to. When you have finished selecting the delegates to add, click **Save Contacts**.







To assign the membership subscriptions, click the **Process Subscriptions** button.


Subscriptions

Available Subscriptions

 **ICA Associate Membership**

 Start date: 06/03/2024
 End date: 06/03/2025
 Available: 1

 **EDIT DELEGATES**



PROCESS (1) SUBSCRIPTIONS

The number of available places will be reduced in line with your selection. If all available places have been assigned, you will see no available subscriptions.

The users assigned a Membership Subscription will receive a welcome email with instructions on how to access the Learning 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.

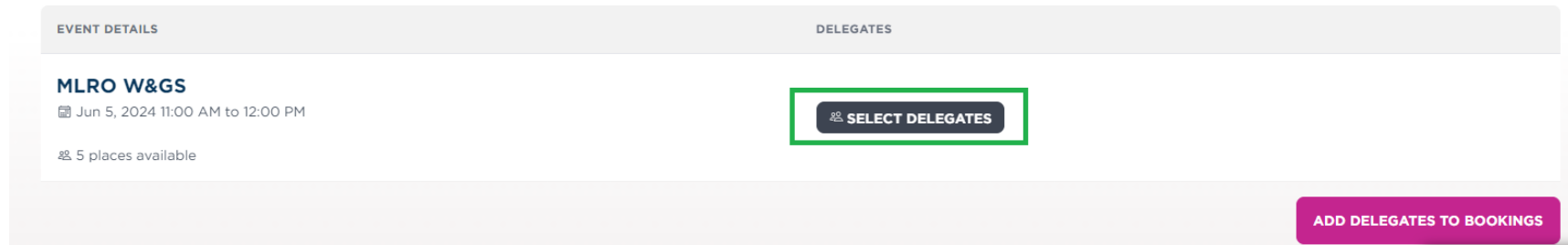
People

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.



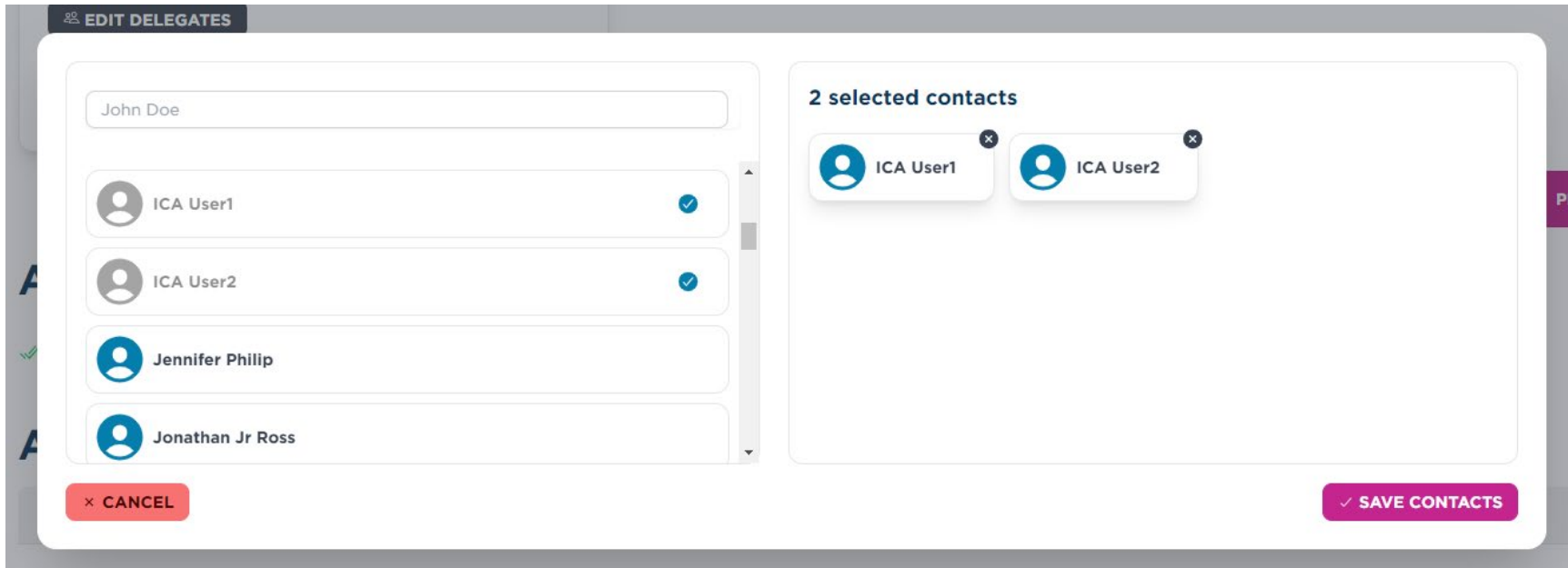
Click on **Select Delegates**.

Assign Bookings

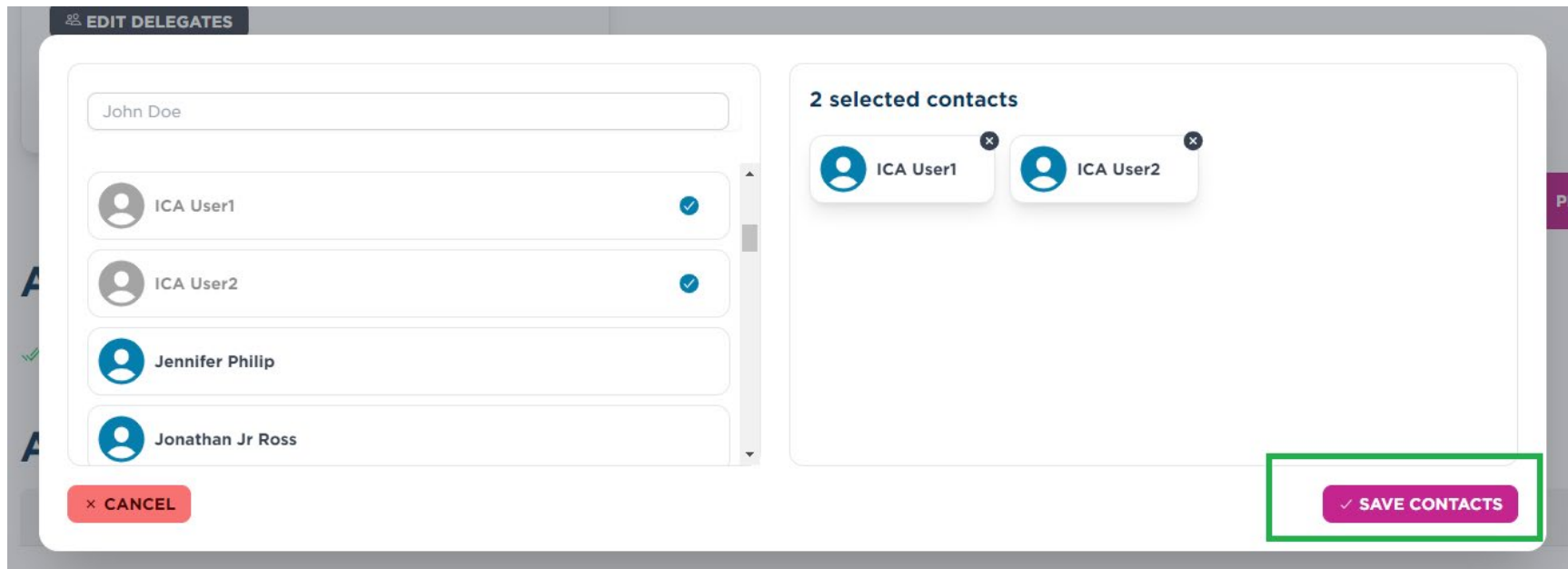


Select the colleagues you wish to assign a place on the Learning Path or Event booking.

Only users with an active membership subscription will appear in the delegate search for learning path and event booking assignment. If you wish to assign a Learning Path and or Event booking to a new user, you must assign the membership subscription first.

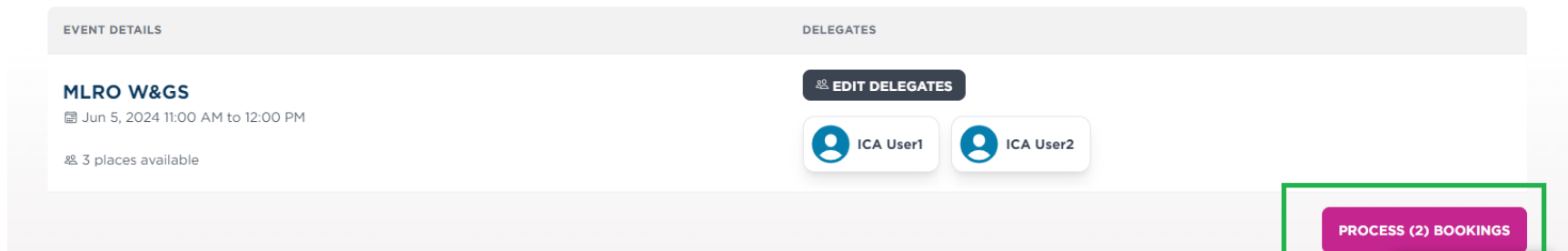


When you have finished selecting the delegates to add, click **Save Contacts**.



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

Assign Bookings



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.