


tessello user guide
Learner
administration



 A learner refers to anyone who has access to the front end of tessello.

Learn how to perform simple learner administration tasks.

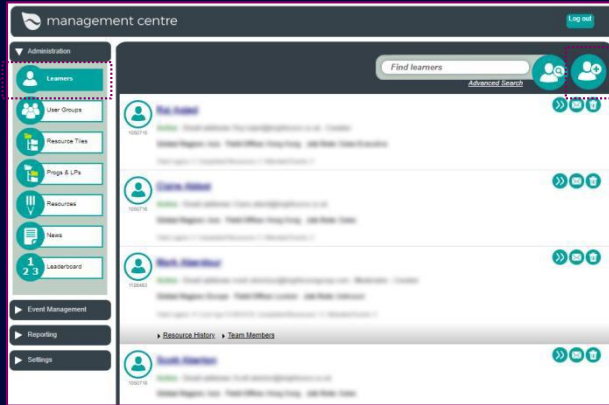
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Adding a new learner

Step 1
Open the Administration menu and select Learners



Step 2
Select the Add Learner button

Step 3
Complete learner details
Note: The fields shown in the form will vary according to your customer configuration

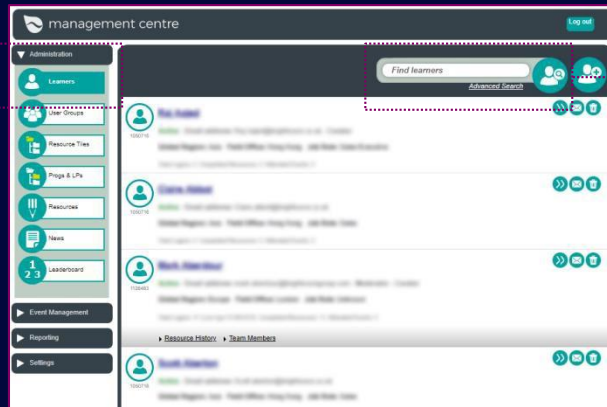
A screenshot of the 'Create Learner' form. The form contains several input fields: 'Email address', 'First Name', 'Last Name', 'Line Managers', 'Global Region', 'Field Office', and 'Job Role'. Below these are checkboxes for 'Manager', 'Moderator', 'Curator', and 'Administrator', all currently set to 'OFF'. At the bottom, there are checkboxes for 'Community Engagement', 'Performance Support', and 'Employee Engagement'. A 'Create Learner' button is located at the bottom left of the form.

Step 4
Click the Create Learner button

Searching for a learner account

To carry out learner admin, you'll need to find a learner's account. This can be done by carrying out a basic or advanced search using the toolbar on the Learners page

Step 1
Open the Administration
menu and select
Learners



Step 2 - Basic
Enter either the learner's first name
and/or last name

Step 2 - Advanced
Click the Advanced link to reveal
more fields, for example where
someone works.

Note: The fields available will vary
depending on your configuration.

Cloning, emailing and deleting a learner

Once you have searched for a specific learner and clicked in to their profile, you can view a brief summary of their details and clone, email, or delete them.

Emailing a learner

You can email a learner directly from tessello

Cloning an account

To create an account with the same details as an existing user, you can clone the original account.

Deleting a learner

You can delete a learner when they leave your organisation.

Note: Deleting a learner will not remove their tracking data. This is retained in order to maintain accurate reporting, however the personal data is 'anonymised'. This means you'll still have reporting information on the number of users who have taken the learning, but the names of the individuals aren't stored.

Alternatively you can choose to make a learner inactive which will stop their access while still enabling administrators to retain their specific tracking records.

The screenshot shows the 'Learner Profile' page in the Tessello system. The page has a dark header with a user icon and the text 'Learner Profile: [redacted]'. In the top right corner of the header, there are three icons: a clone icon (two overlapping figures), a trash can icon, and a close icon (an 'X'). Below the header is a sidebar with three menu items: 'Profile' (with a wrench icon), 'Records' (with a document icon), and 'Mail Learner' (with an envelope icon). The main content area contains a form with the following fields: 'Email address:' (text input), 'First Name:' (text input), 'Last Name:' (text input), 'Line Managers:' (text input with a red 'X' icon and an 'Add Manager' link below it), 'Password:' (password input with a 'Reset' link), 'Global Region:' (dropdown menu), 'Field Office:' (dropdown menu), and 'Job Role:' (dropdown menu). At the bottom of the form, there is a 'Learner is active:' toggle set to 'ON' and a 'Save' button. A red dashed line points from the 'Mail Learner' icon in the sidebar to the 'Emailing a learner' text on the left. Another red dashed line points from the clone, trash, and close icons in the header to the 'Cloning an account' and 'Deleting a learner' text on the right.

Updating a learner's account

You can also click on the learner's name to adjust further learner details.

Assign a manager Select from all tho:

The screenshot shows a 'Learner Profile' form with the following sections:

- Profile:** Email address, First Name, Last Name, Line Managers (with an 'Add Manager' button), Password (with a 'Reset' link).
- Global Region:** A dropdown menu.
- Field Offices:** A dropdown menu.
- Job Role:** A dropdown menu.
- Permissions:** A list of roles with toggle switches: Learner is active (ON), Disable Community Access (OFF), Exclude from reports (OFF), Manager (OFF), Moderator (OFF), Curator (ON), Administrator (OFF).
- Community:** A list of checkboxes for various community features: Community Engagement (checked), Employee Engagement, Personalised Learning, Performance Management, Admiral community, Habilidades via Idioma, No community access, 1-6, and Wellness.

A 'Save' button is located at the bottom left of the form.

Reset password

Alter learner information
Note: These fields will be dependent on your configuration

Alter their role permission
Administrator, Manager,
Moderator or Curator. See user
roles section for more information

Add to a Community
See separate Communities user
guide for more information

Review a learner's training record

Within Management Centre you are also able to check and edit a learners training record

View the records
Click in to the Records
section within the
learners account

The screenshot shows a web interface for a learner's profile. On the left is a sidebar with three items: 'Profile' (with a person icon), 'Records' (with a list icon), and 'Add Learner' (with an envelope icon). The 'Records' section is active. The main content area has a header with 'Learner Profile: [Name]' and icons for search, delete, and refresh. Below this is a filter section with three dropdown menus: 'Resource Title', 'Programme', and 'Resource'. To the right of these is a 'Load' button. The main area contains the text 'No learning records found.'. At the bottom, there is a form to 'Add' a record. It has a 'Status' dropdown menu with the text 'Please select a resource status', a 'Score' input field, and an 'Add' button.

Select the training you
want to review
The records will
populate in the middle
of the screen

Adding record manually
You can also add a
record manually by
completing the bottom
row

Learner user roles

There are 4 different user roles (in addition to a standard user) that a learner can be assigned. A learner can be assigned to all or none of these additional roles.

Administrator

An Administrator can perform certain actions with **any** learner:

- View their My Learning area
- Enrol them on a Learning Pathway
- Register them on events
- Award points in communities

Manager

A Manager can perform certain actions with their team members

- View their My Learning area
- Monitor their progress
- Enrol them on a Learning Pathway
- Approve a learner's request to enroll on a Learning Pathway
- Approve/reopen their Learning Pathways
- Register them on events
- Award points in communities

Moderator

A Moderator can monitor what's being shared in the community groups they are a part of.

They are able to:

- Delete any posts with immediate effect
- Review posts that been reported by other learners
- Remove flags from reported

Curator

A curator can create resources from two sources.

They are able to:

- Monitor learner contributions in their community groups and curate them in to a permanent resource within an existing programme.
- Curate materials from their Experiences area in to existing programmes.



Related Guides

Other useful user guides

Here is a list of other user guides you may find useful

Communities - How to add learners to different communities



If you are experiencing any difficulties with Learner Administration, please contact the Tessello support desk.

