

# BizPro Guide for Administrators

## Group Management- Classes

To get started, log in to RUN > Exclusive Benefits > Upnetic > Start Training. You'll land on the "Group Management" page. Here, you can manage the courses, classes, and users for your company. Classes are essentially groups that you can create for your company. You determine which courses, and which employees, are in each class. **For example**, you can create a "Supervisor" class and only assign the training courses you wish for that particular class to complete. From there, you would add your management level employees to that class.

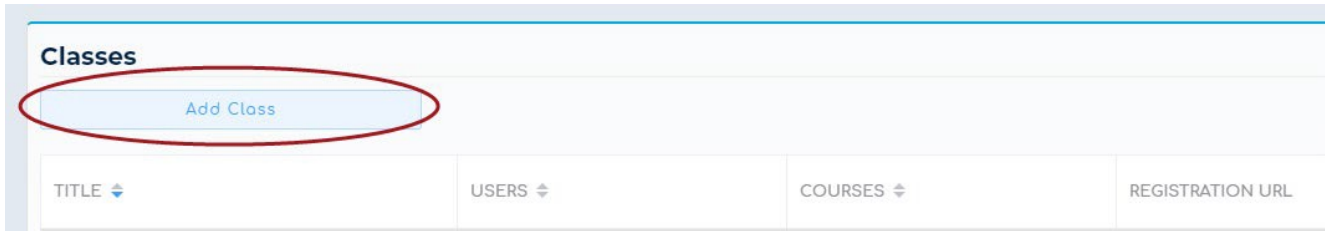
Another example would be creating a "Spanish" class where you could select the Spanish language training courses and assign them to your Spanish-speaking employees.

TITLE	USERS	COURSES	REGISTRATION URL	ACTIONS
Default	4	7	<a href="https://pro.upnetic.com/compony/5495/">https://pro.upnetic.com/compony/5495/</a>	
CA Employees	3	1	<a href="https://pro.upnetic.com/class/60628/">https://pro.upnetic.com/class/60628/</a>	
CA Supervisors	5	2	<a href="https://pro.upnetic.com/class/60548/">https://pro.upnetic.com/class/60548/</a>	

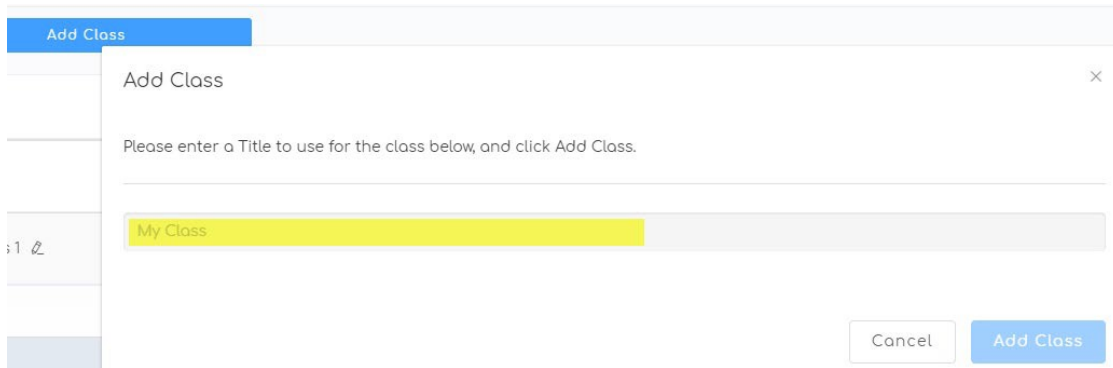
Below, you will see that every group automatically has a "Default" class. This class name cannot be edited or deleted. **If you don't need to set up multiple classes with different courses**, you can simply use the default class and not add any additional classes. You can add courses to the default class by clicking on the pencil icon. Alternatively, you can skip the default class altogether and move forward in customizing your new classes.

TITLE	USERS	COURSES	REGISTRATION URL	ACTIONS
Default	4	7	<a href="https://pro.upnetic.com/compony/5495/">https://pro.upnetic.com/compony/5495/</a>	

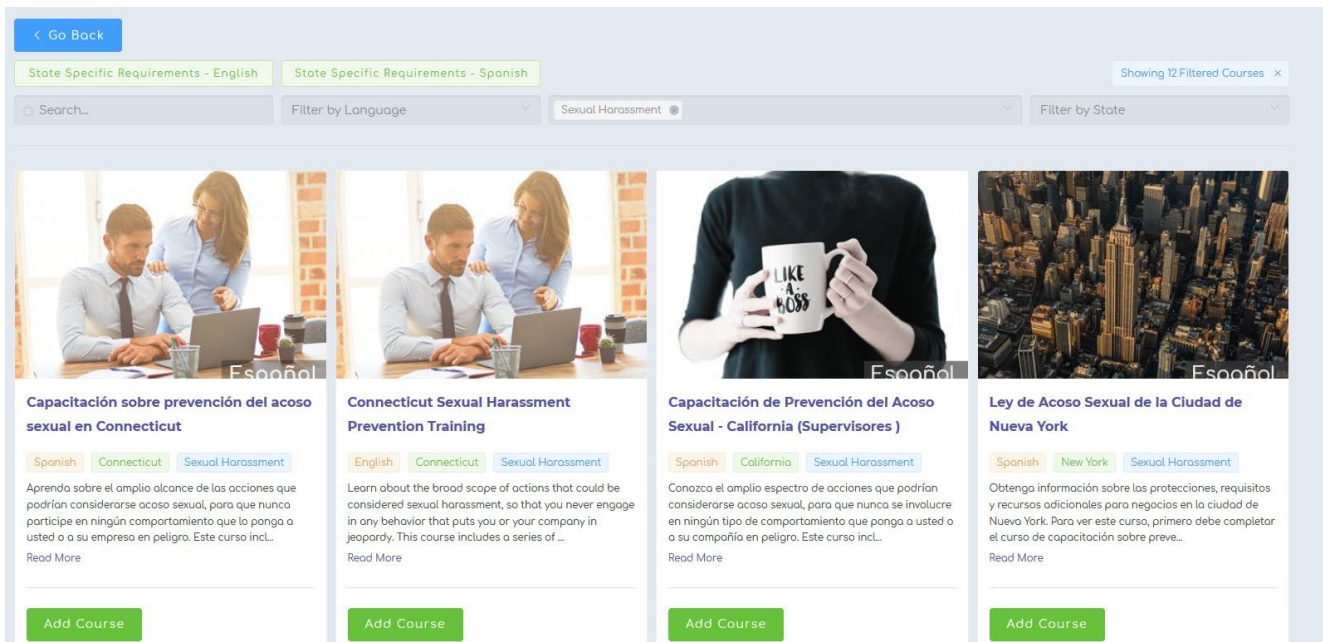
To add a new class, click on the “Add Class” button, shown below:



You'll see a popup prompting you to enter the title of your class. Then click on the blue “Add Class” button:



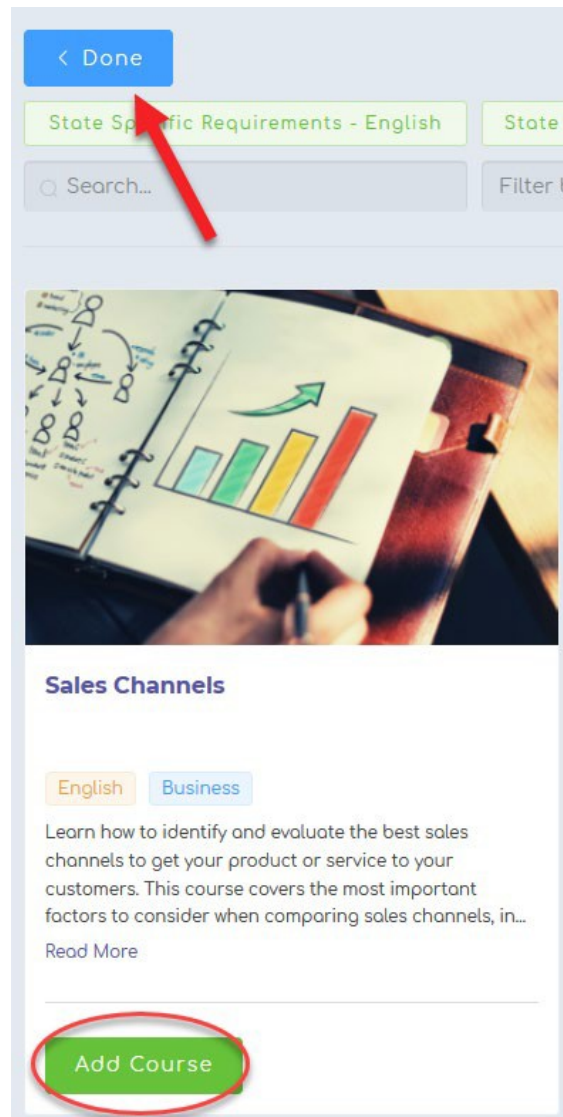
This will take you to the **course list**, where you can select which courses to add to a class:



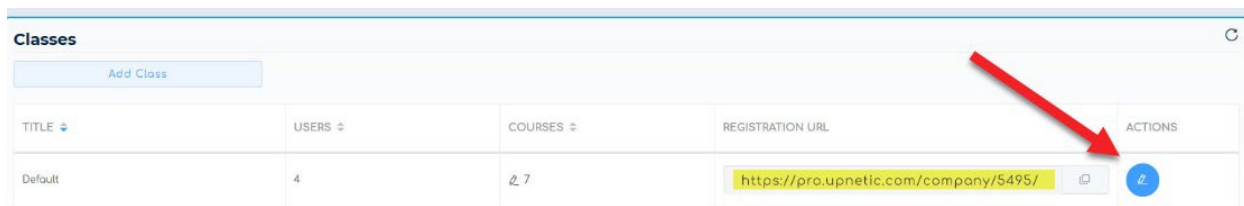
You're able to **filter the courses** by Language, Category, or State.




Click on the green **'Add Course'** button to add a course to that class. Then click the blue **'Done'** button.



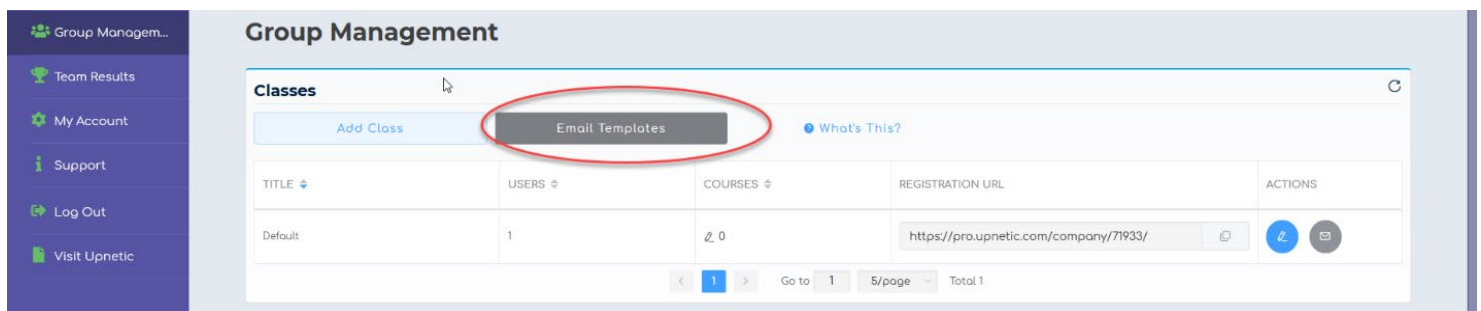
You can also **edit any class** at any time by clicking on the **pencil icon** by the class, shown below. This will allow you to remove or add courses.



TITLE	USERS	COURSES	REGISTRATION URL	ACTIONS
Default	4	2.7	https://pro.upnetic.com/company/5495/	

## Employee Registration



Once you add courses, you'll see that each class has a different **registration URL**, highlighted above in yellow, that you'll send to the employees who belong in that class. **Note that this is only for new employees** who have not yet registered for an account.



Group Management

Classes

Add Class Email Templates What's This?

TITLE	USERS	COURSES	REGISTRATION URL	ACTIONS
Default	1	2.0	https://pro.upnetic.com/company/71933/	 

Go to 1 5/page Total 1

We also provide **email templates for your convenience**. You can use the template to send a registration message from your own email account to your employees.

Selecting **“Open Template”** will open your computer's default email client (e.g., Microsoft Outlook). If you do not have a default email client on your machine, or you use a web-based email system (e.g., Gmail), **select “Download Template.”** This will download the template as a simple text file, which you can open to customize the text of the message. When you're ready, copy and paste the message into a new email to your employee(s).

**BizPro will not send the registration email on your behalf**, as third-party emails are more likely to be flagged by email spam filters, and your employees are more likely to open an email from their employer or another company administrator than from a third party. This also gives you the option to customize the message with deadlines or other company-specific requirements.

**Enrolled Users**

How to add users: **Add 1 User to Classes** Remove 1 User from Classes

Search... Filter by Classes

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	CLASSES	STATUS
<input checked="" type="checkbox"/>	Alejandro	Castro	acastro@test.com	Safety	Not Started

**If you need to add a previously registered employee to an additional class,** you can check the box next to their name, and select “Add user to classes.” From there you can click on the classes you wish for that user to access. You can also select more than one employee at a time to bulk assign to classes.

**If your existing employees need to access the training again,** direct them to log in on pro.upnetic.com. If an employee doesn’t remember their password, they can reset it on the login page.

**To view classes by employee,** refer to the “Classes” column below (You can also remove/change a user’s classes in this section as well):

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	CLASSES	STATUS
<input type="checkbox"/>	Allison	Knowles	aknowles@upnetic.com	Test Class 1	Not Started
<input type="checkbox"/>	Brooke	Hughes	rbaker@gosmallbiz.com	Default	In Progress
<input type="checkbox"/>	Kate	Guest	kguest@tarkenton.com	Test Class 1	In Progress

## Group Leaders

On the “Group Management” page, you will see a section titled “Group Leaders.” This is where you will be able to see the group leaders for your organization. A group leader has access to the “Group Management” page as well as the “Team Results” page, whereas an employee or subscriber will not. Under the “Group Leader” section, existing group leaders can add additional group leaders.

**To add a Group Leader,** click the green “Add Group Leader” button and input the first name, last name, and email address of the employee you want to add.

Group Leaders			3 Total
<a href="#">Add Group Leader</a>		Q Search...	
<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL
<input type="checkbox"/>	User		oknowles@upnetic.com
<input type="checkbox"/>	Kate	Guest	kguest@tarkenton.com
<input type="checkbox"/>	Sarah	Hawkins	sarah@email.com

< 1 > Go to 1 10/page Total 3

## Team Results

Group leaders can access the “Team Results” page on the purple menu to the left of the page. This page allows group leaders to see their employee’s progress in one place. From this page, you can view how far employees have progressed in their assigned courses as well as any completion certificates they have earned.

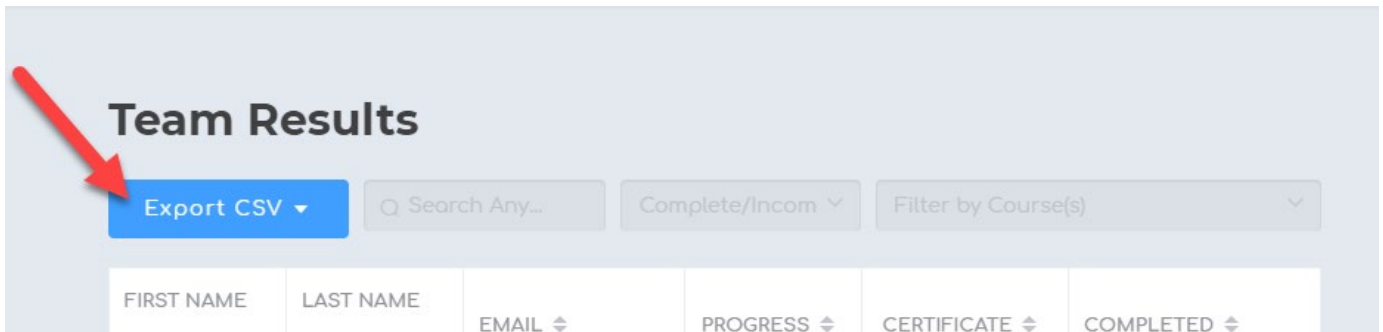
**To view the progress of an employee,** refer to the “Progress” column below:

FIRST NAME	LAST NAME	EMAIL	PROGRESS	CERTIFICATE	COMPLETED
Kate	Guest	kguest@tarkenton.com	100%		May 19, 2020 8:56 am
Kate	Guest	kguest@tarkenton.com	100%	<a href="#">Download 2019</a>	October 18, 2019 8:40 am

**To view and download completion certificates for an employee,** refer to the “Certificate” column below (please note that only state-specific courses offer certificates):

Kate	Guest	kguest@tarkenton.com	100%	<a href="#">Download 2019</a>	October 18, 2019 8:40 am
------	-------	----------------------	------	-------------------------------	--------------------------

On the “Team Results” page, you are also able to export the data to an Excel spreadsheet. **To export**, you will select the blue “Export CSV” button.



From the drop-down arrow under “Export CSV” you are able to select “all” or “filtered.” The “All” option will export all group data. The “Filter” option will allow you to filter by name or course, and export only that data.

## Email Notifications

Both Group Leaders and the employee who completed a state-specific sexual harassment prevention course will receive an email in real-time with the completion certificate attached.

Group leaders will also receive **email notifications** 60 days prior to the state-mandated renewal date. The email will have a CSV file attached with a list of the employees’ names, email addresses, courses to be renewed, and due dates. It will also include instructions on how employees can log in and retake the course.