Team Admins Guide

Pract.us Basics for Team Administrators

This guide helps Team Administrators get the most from the Pract.us app. For more detailed help with other Pract.us roles, see these additional guides:

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Getting Started	Mentors Guide	Learners Guide
Skill Authors Guide	Card Authors Guide	Managers Guide

Topics in this Guide

- Creating new user accounts
- Ejecting members from the Team
- Creating new Fields
- Retiring Fields
- Team settings
- Managing your Team subscription
- Getting Help

Creating New User Accounts

You need to be a Team Admin before creating a new user account or inviting a person to join the Team. If you don't have the Admin role for your Team, then another Team Admin will need to give you the Admin role.

1. From anywhere in the Pract.us app, open the slide-out side menu by selecting the ☰ button as shown in the **orange** rectangle below.
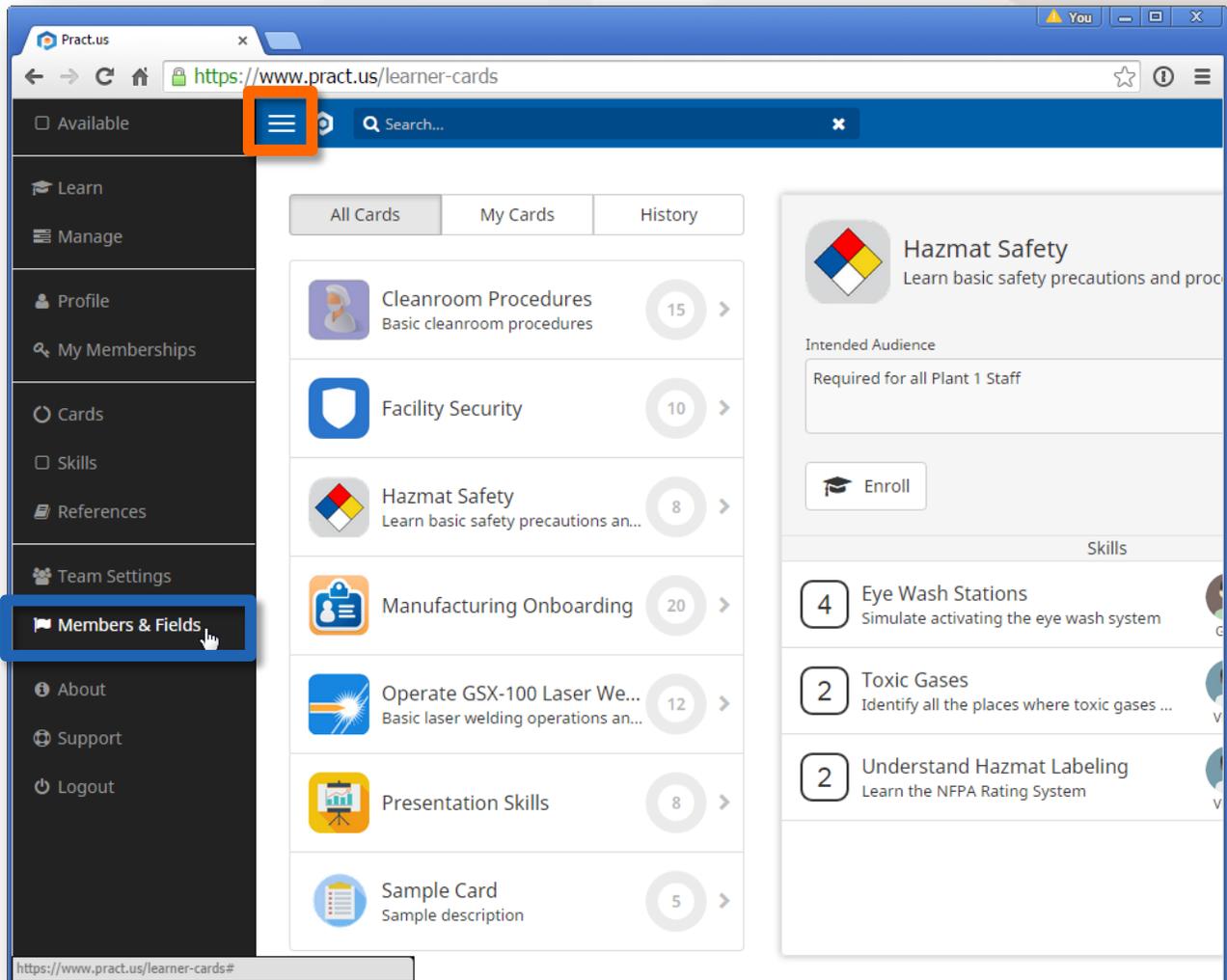

The Card Catalog with black slide-out side menu visible on the left

2. Select ⚑ Members & Fields as shown in the **blue** rectangle above. If you don't have the Admin role in this Team, you won't see this menu option. You should see a page like the following:
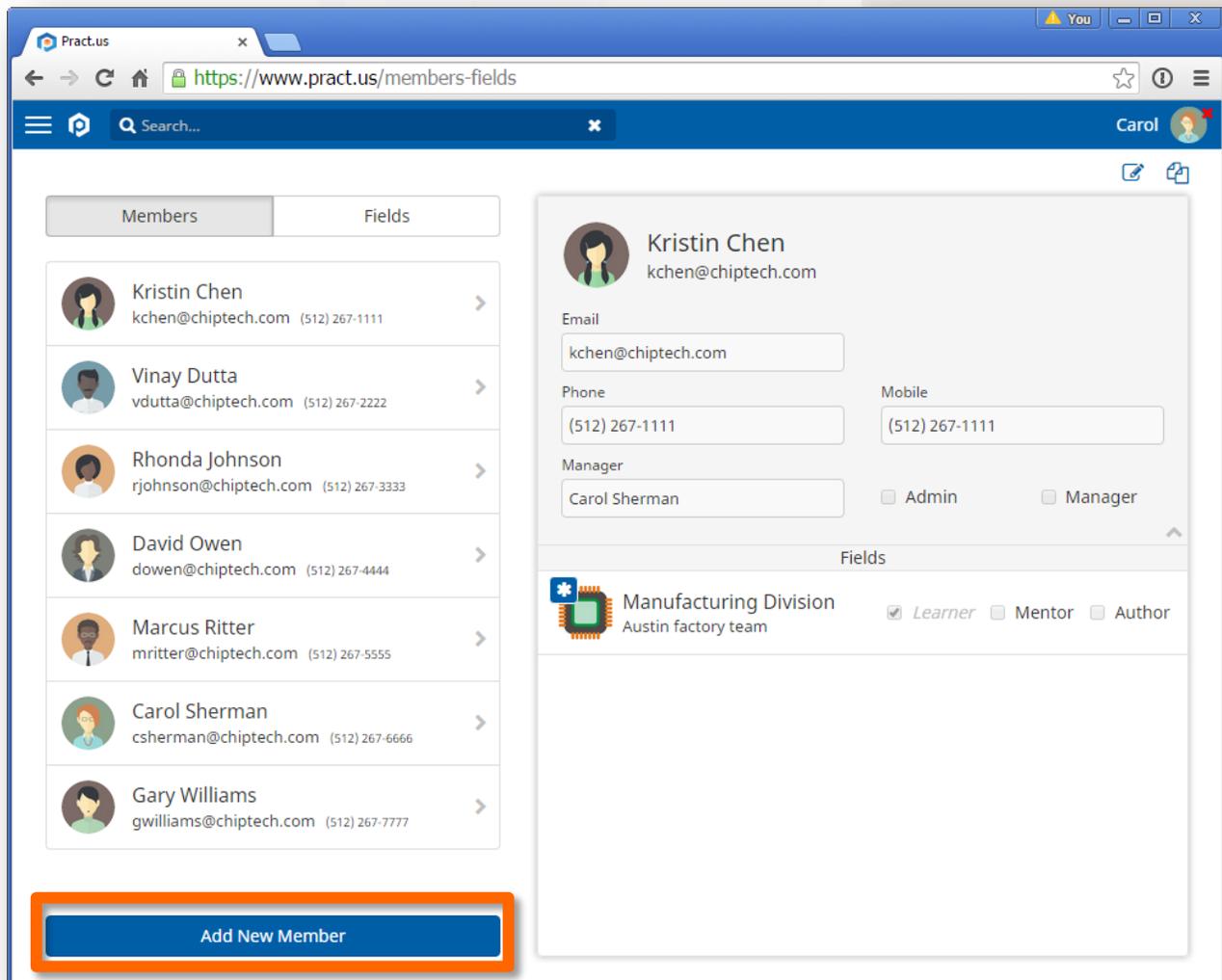
The Members & Fields view

3. Select Add New Member as shown in the **orange** rectangle above.

4. You should see the New User view below (the numbered orange circles are used for reference here - they aren't part of the view):
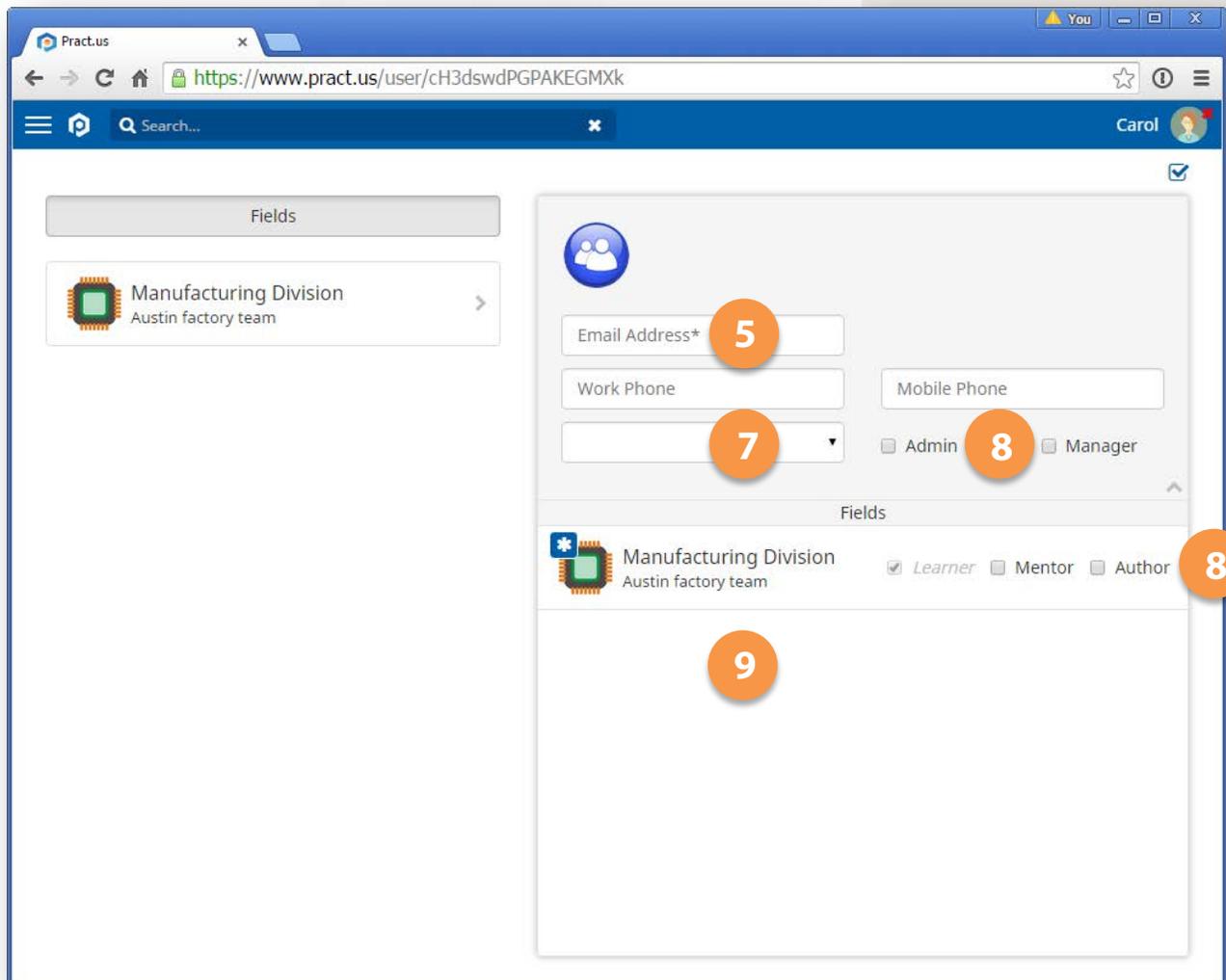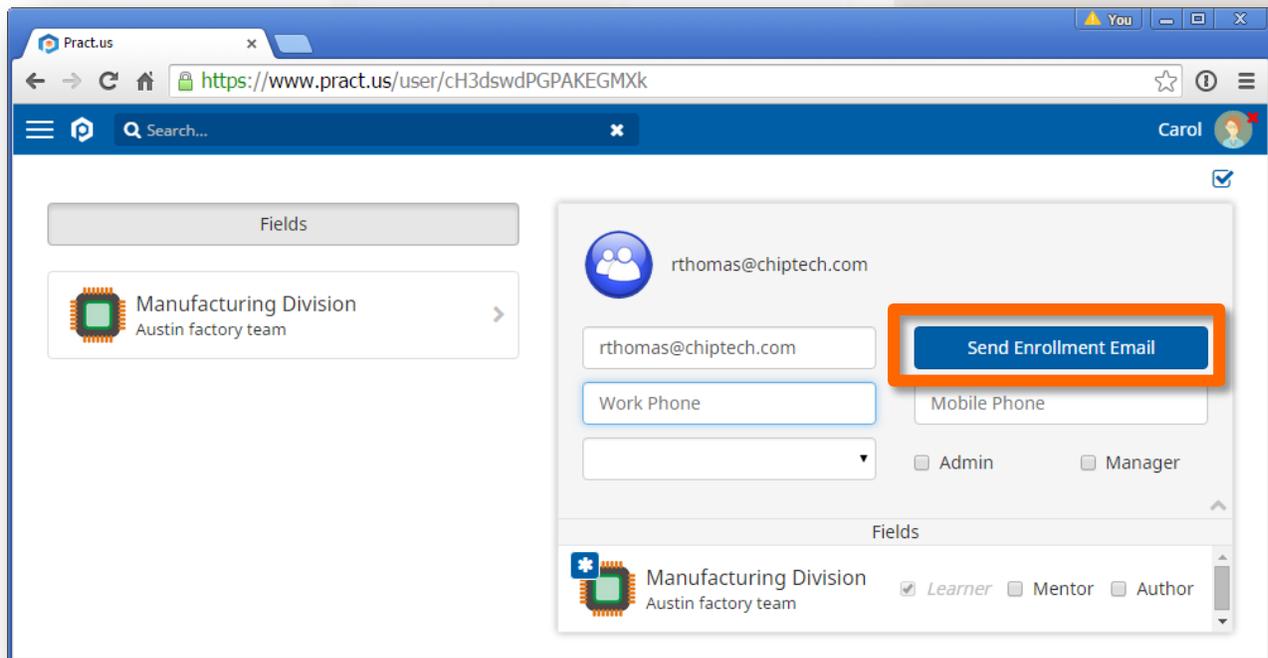
The New User view

5. Enter an **Email Address**. Pract.us will send the welcome email to this address.

   a. If you enter an address that Pract.us recognizes (because the person is already a member of another Team) then a window will pop up to let you know that the person will be invited to join your Team. Pract.us will not create a new account. In this situation, you won't be able to assign roles, manager or Fields until after the user accepts your invitation.

6. After entering the email address, select Send Enrollment Email as shown in the **orange** rectangle below. This will send the welcome email to the new user.

7. Select a **Manager** for the new user. This drop-down box contains the list of all users in your Team with Manager role. If this new user will be self-managed (i.e., be his or her own manager), then the

new user will need to complete their Profile before their name will be added to this list. Self-management is used when you want to include a senior person in your Team, but they don't need a Manager. If a member is self-managed, then their enrollment requests are automatically approved. Managers have important role to play in Pract.us, so be sure every member of your Team has one assigned.

8. **Roles**. Select the roles you want the new user to have. Notice that some roles, such as Admin and Manager are set at a Team level, whereas others are set at the Field level. All users have the Learner role by default.

9. **Fields**. Each Field is its own separate training group within your Team account, with its own cards, skills, members and role assignments. Fields allow you to organize and control your various training programs. By default, every new user on your Team will be joined to the Field(s) designated as Home Fields. In the example above, the Manufacturing Division Field is the Home Field for this Team, so every user is automatically joined to it when they join the Team.

    a. If you want the new user to have access to more Fields, drag them over from the left-hand list and assign appropriate roles as before.

10. The work phone and mobile phone fields will be entered by the new user when they log in and complete their Profile. They're shown here so the Admin has convenient access to the information.

11. To save your new user, select **Save** ☑ in the upper right corner of the app. A new user with a generic avatar will appear in the left hand list.

Sending the Invitation Email

What a New User Sees

1. The new user will receive a welcome email from Pract.us on your behalf, inviting him or her to join your Team.

   a. If an account with that email address already exists, then the invitation email will contain a single URL link that simply joins the user's existing account to the your Team.

   b. If an account with that email address does *not* already exist, then the user might still have an existing account under *another* address. The invitation email will contain two URL links - one to follow if the user is truly new to Pract.us and a second one to follow if they already have an account under another email address. We want to make it easy for users to keep all their Team memberships in a single account.

   c. Following any of the URL links will take the user to the Pract.us app.

2. Users who follow the URL link for <u>existing accounts</u> and sign in will automatically join your Team.

3. Users who follow the URL for <u>new accounts</u> will be prompted to enter and confirm a password, then sign in. This will create their new account *and* join them to your Team.

4. New users will see their empty **Profile** page, where they can enter name, contact info and an avatar.

Resetting Passwords

As an Admin, you can't actually see or edit a member's password. But you can *reset* it by editing the member's record in **Members & Fields** view and selecting **Reset Password**

If the button is not available, then the user still has not completed the new account creation process. If you suspect the user never received the invitation email (spam folder?), or if they lost it, you can resend it as many times as necessary. For security reasons, resending an invitation automatically disables the URL links in any previous invitations.

Removing Members from a Team or Field

There are two ways to disconnect a member and a Field. You can:

- Remove the member from the Field, or
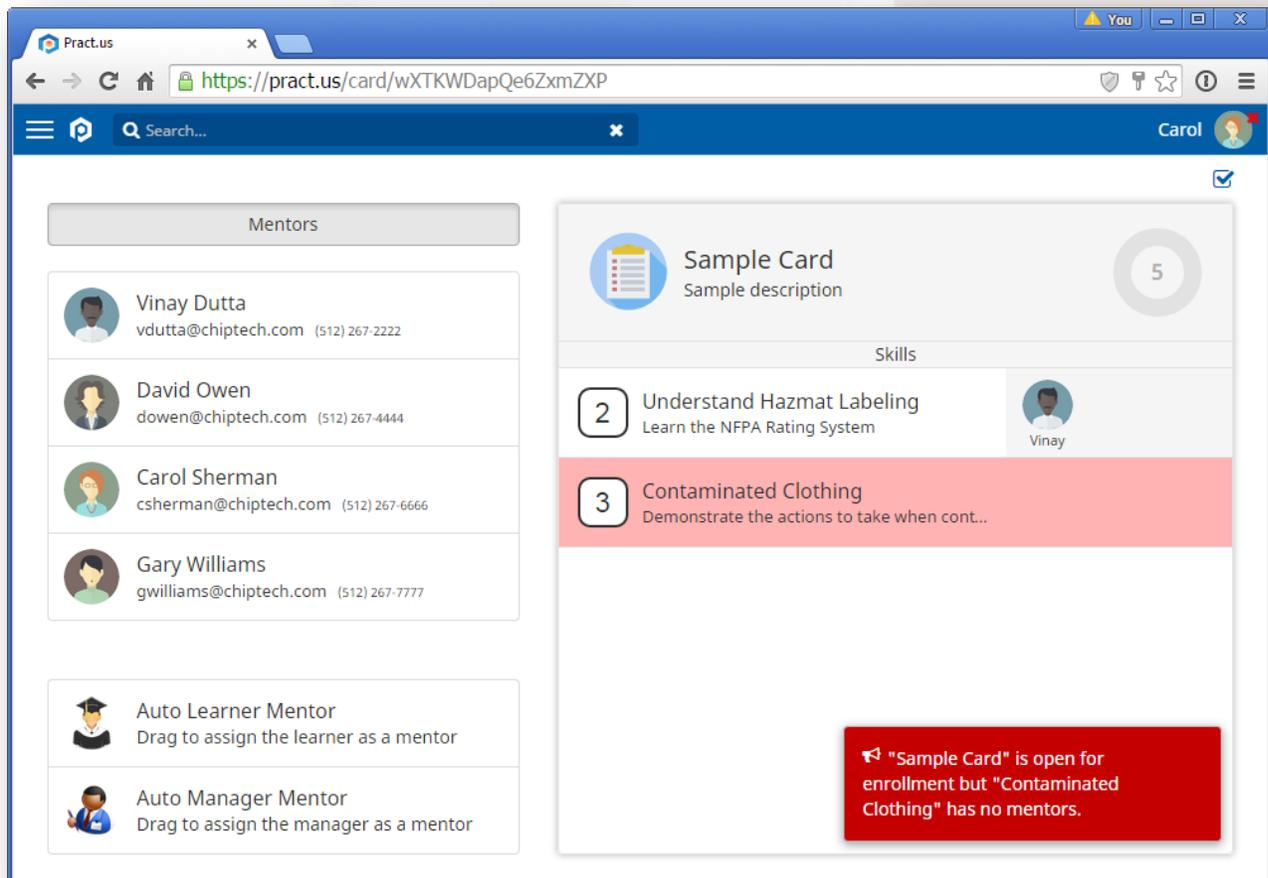
- Remove the Field from the member

In both cases, go to **Members & Fields** in the slide-out menu:

1. To remove the member from a Field, select **Fields** from the top of the left side

   a. **Edit** the Field on the right side.

   b. Choose the member you want to remove or "eject" and select the **gray** icon in the upper right corner of the member's row

   c. If the member is only joined to a single Field, then ejecting her from it will also cause her to be ejected from the entire Team.

   d. If the member is joined to more than one Field, then ejecting her from one will not affect the others.

   e. If you eject a member from a Field where she has cards in progress, then those cards will be canceled. **This action cannot be undone**, so be sure you really want to eject the member before confirming the action.

2. To remove a Field from the member, select **Members** from the top of the left side

   a. **Edit** the member on the right side.

   b. Choose the Field you want to remove and select the **gray** icon in the upper right corner of the Field's row

    c.   If the member is only joined to a single Field, then removing it will also cause her to be ejected from the entire Team.

    d.   If the member is joined to more than one Field, then removing it from one will not affect the others.

    e.   If you remove a Field from a member who has cards in progress, then those cards will be canceled. **This action cannot be undone**, so be sure you really want to remove the Field before confirming the action.

3.   Ejecting a member who has the Manager role may cause some members to lose their Manager. Pract.us will notify you if this happens so you can assign new Managers. Any members who lose their Manager won't be able to get their enrollment requests (new cards, extensions, and cancellations) approved until they get a new Manager. As soon as a new Manager is assigned, any enrollment requests that are awaiting Manager action will be automatically re-routed to the new Manager.

> 📢 The following users need a new manager: Kristin Chen, Vinay Dutta, Rhonda Johnson, David Owen, Marcus Ritter, Gary Williams

this popup notifies you that a membership or role change has left some users without a Manager

4.   Ejecting a member who has the Mentor role may cause some skills to become "unsignable". Authors are advised to always assign more than one Mentor to a skill, but Pract.us does not enforce this. If a skill in use on a card suddenly has no Mentors who can sign off, the skill will become shaded pink, and you (as well as the skill or card Author, the Learners affected, and their Managers) will be notified. It's the Author's responsibility to assign a new Mentor as soon as possible, but you may need to get involved if this takes too long. As Team Admin, you can reassign the skill's or card's owner if its current Author is unavailable, including assigning it to yourself.

A Missing Mentor has been identified

5. Ejecting a member who has the Author role may cause some skills or cards to lose their owner. Only the owner can edit the skill or card. If this happens, you will be notified of the list of skills and cards that need new owner assignments.

this popup notifies you that a membership or role change has left some cards or skills without an Author

6. If you try to eject a member who is the only Admin remaining in the Team, you'll see an alert like the one below. Before ejecting the last Admin from a Team, you'll need to give the

this popup notifies you that a membership or role change can't be made because it would leave the Team without any Admins 9

Admin role to at least one other member.
Every Team must have at least one Admin.

Creating New Fields

Every Team has at least one Field, and you can create as many additional Fields as you want. Each Field acts as a separate training environment, with its own set of members (each with their own roles), cards and skills. A user can be a Learner in one Field and a Mentor in another Field. As a Team Admin, you can control which of your members belong to which Fields, and which roles they have in each.

Any Field can be a "Home" Field. Home Fields are automatically assigned to any new member joining your Team. All other Fields are *optional* which you must assign manually to your members.

Retiring a Field

If you delete a Field, then all of its content, including cards and skills, will be deleted. All users will be ejected from the Field and all of their cards in progress (if any) will be cancelled. **This action cannot be undone**, so be sure before confirming. If you retire the last Field in a Team, the entire Team account will be shut down.

Team Settings

There are a number of settings and configurations that you need to maintain. Some of the items on the **Settings** page correspond to features that will be included in future Pract.us releases and are not yet available.

- Team account POC: when a Team account is created, the user who creates it becomes the POC. But all members of the Team with Admin role will appear in this dropdown, so you can change it to another Admin. If Pract.us needs to contact a Team, we will use the contact information for the Team POC.

- Enable for Team Admins: *this feature is not yet available*.

- Allow in Member's Record: this feature will allow the Team Admin to control how much card and skill information is visible in a member profile's card completion record. At a minimum, the record will contain the card name, completion date and badge. But you can also allow skill names and Mentor names if you choose. This feature is not yet available.

- Allow Card Export to File: *this feature is not yet available*.

- Mentor Sign-off Options: you can choose which sign-off methods are available to your Team. Your choice will apply to all Fields in your Team. Only Mentor PIN and Email are available, but Pract.us will add others over time.

- Author Options: the purpose of the Generic (Auto) Learner and Generic (Auto) Manager mentor options is described in the Card Authors Guide. You can prevent these mentors from being used by de-selecting them here. If you initially allow these generic mentors and then remove them later, you may cause missing mentors in cards and skills.

- Manager Options: Disable pace. When a Learner falls behind pace while working on a card, the Progress Dial will be colored **red** and the Manager will be notified. This helps to keep the Manager informed about the Learner's status. If you want to disable the red color and notifications, uncheck this option. It will apply to the entire Team.

- Accept Join Requests: *this feature is not yet available*.

- Set Point Value Guidance: you can define what a point "means" in your Team. This definition will apply to all skills and cards in all Fields in your Team.

- Sign-off Request Reminders: *this feature is not yet available*.

- Set Normal Work Days: *this feature is not yet available*.

Managing Your Team Subscription

The **Subscription** and **Payment Details** pages display information about your subscription plan, usage, and payment method.

Total Members lists the total number of users who are currently members of your Team.

Active Members are those users who have:

- signed in to your Pract.us Team during the last billing cycle, or

- signed-off a skill in any of your Fields during the last billing cycle, or

- performed any enrollment action on a card during the last billing cycle

Active members are those who "count" for purposes of your plan's limit and billing.

- Example 1: You subscribe to TEAM 50. If your Team has 60 *total* members but only 45 of those are *active*, then you are under your 50 user limit (with 5 to spare).

- Example 2: You subscribe to TEAM 10. If your Team has 20 *total* members and 15 of those are *active*, then you are over your 10 user limit and will be billed for the 5 extra active members at the applicable overage rate.

Upgrading: you can upgrade a Trial at any time by choosing from any of the paid subscription plans. You'll receive pro-rated credit for any trial period remaining, so if you upgrade to a paid plan half-way through your 30-day trial, the first 15 days of your new subscription will be free.

Also, if you change plans during a billing period, your next month's charge will be adjusted for the pro-rated difference.

Cancelling: Cancelling your subscription will:

- eject all members from your Team

- cancel all cards in progress in all Fields

- retire all cards and skills in all Fields

Cancelling your subscription cannot be undone.

Payment Details: The billing and contact information for your Team's POC are located here.

Getting Help

- For more help using Pract.us, see our Support Site: support.pract.us.

- You can also email us at support@pract.us