



# USER GUIDE

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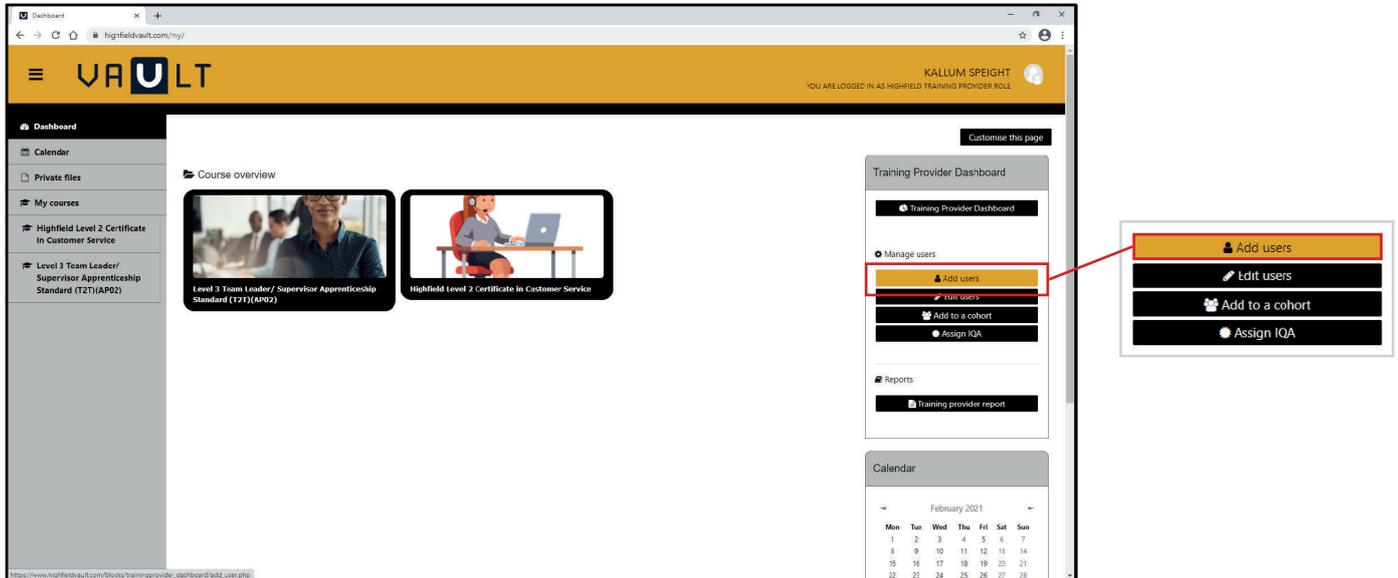
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# Adding a new user

(single user)



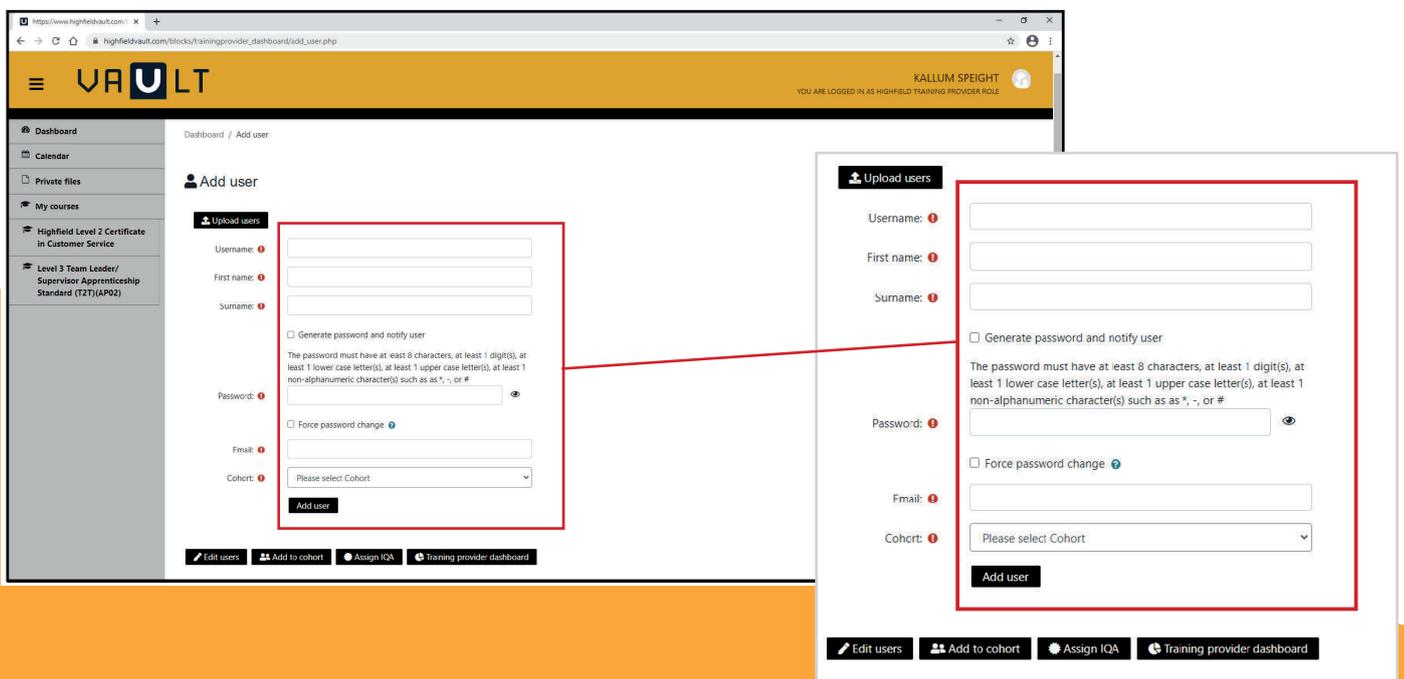
On the dashboard, please select '**Add users**' which is located on the right-hand side of the screen.



This will take you to the 'Add user' page where you are able to fill out the required fields which have a red exclamation mark next to them. **Username: please always use the learner's email address.**

By ticking '**Generate password and Notify user**' the system will generate a welcome email with the learner's login details. Alternatively, you can set a password for the learner yourself, for which you can tick '**Force password change**', which will then ask the learner to change their password once logged in.

Once all the required fields have been completed, please click on '**Add user**' at the bottom of the screen.



## Bulk uploading users to the same cohort:

You will first need to complete the '**Bulk user upload spreadsheet**'  
(if you require a copy of this please contact the Highfield Vault team.)

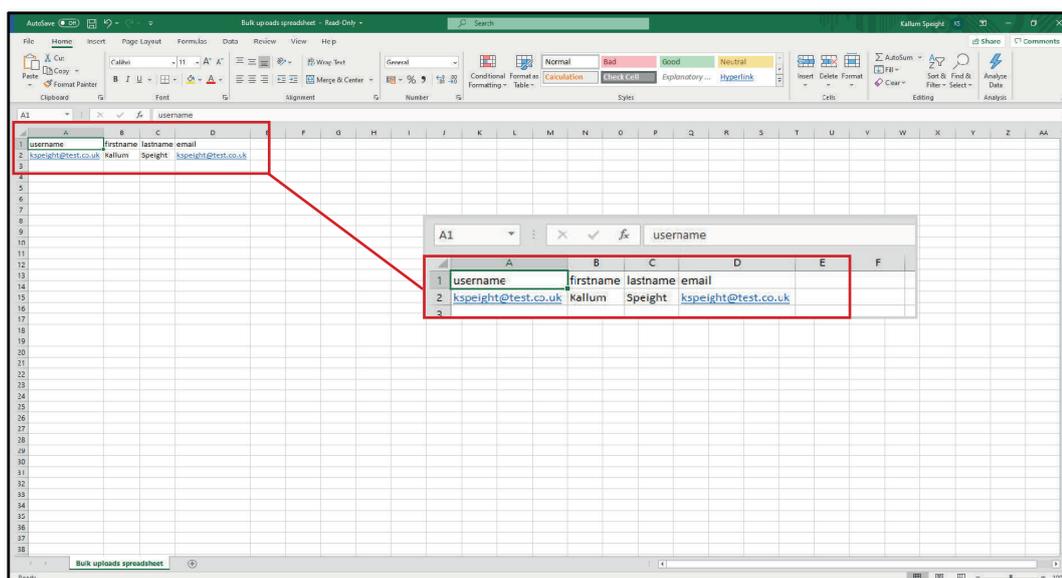
You will need to complete the following fields as shown in the example below.

Username: always the learner's email address in lowercase.

Please ensure that there are no spaces at the beginning or end of the username.

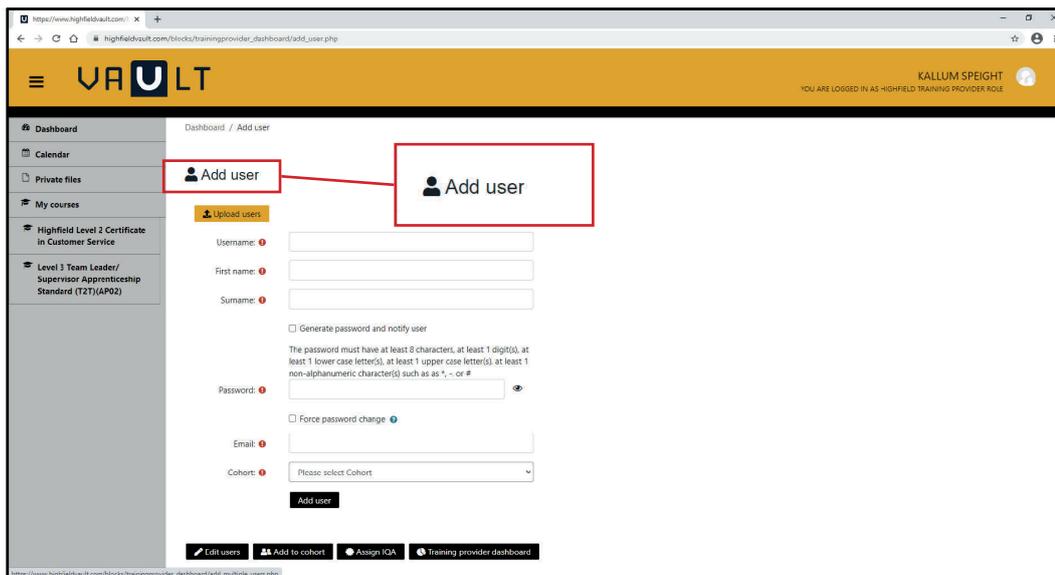
- First name
- Last name

Email: Please ensure that there are no spaces at the beginning or end of the username.



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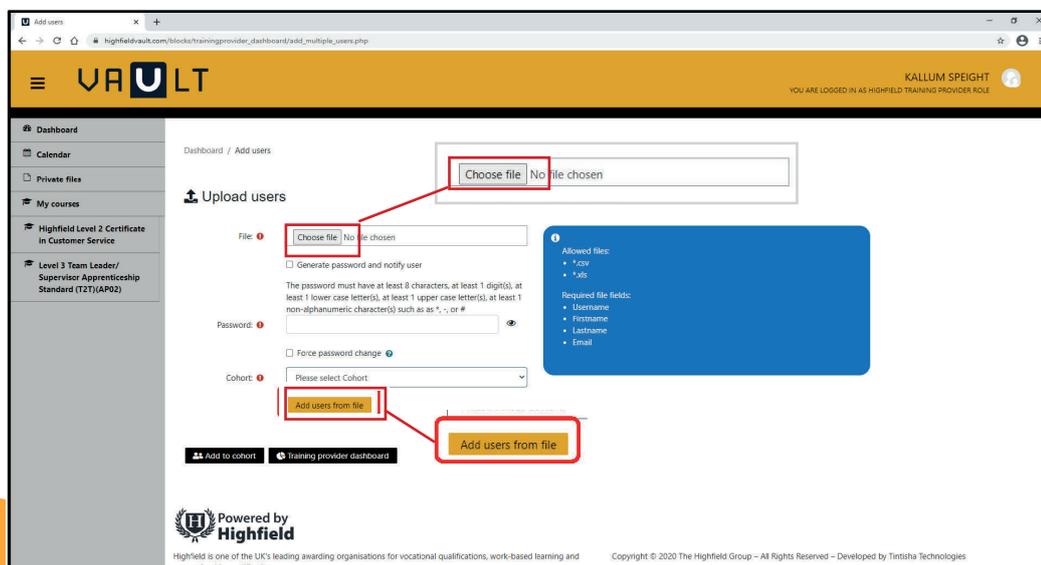
On the 'add users' screen you will need to select '**Upload users**'.



Once you have clicked '**Upload users**' you will need to upload your pre-completed bulk user upload spreadsheet/cvs file by clicking on '**Choose file**'. This will allow you to select the document from your PC.

By ticking '**Generate password and notify user**' the system will generate a welcome email with the learner's login details. Alternatively, you can set a password for the learner yourself, of which you can tick '**Force password change**' which will then ask the learner to change their password once logged in.

Once you have selected the cohort you are adding the user to, please click on '**Add users from file**'.



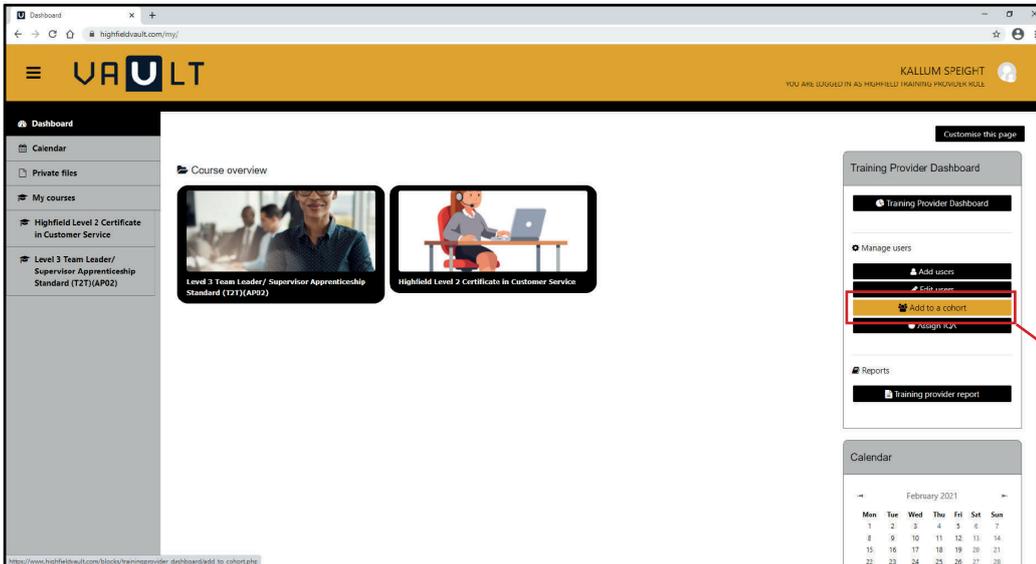
Finally, you will be taken into a screen that lists the users to be added and you can click on '**Upload**' at the top left of the screen.

If any of the users have an error next to them, there will be advice on this error found on the right of the user selection. Usually, this would be because there is a space at the front or end of the username/email address or because the user already exists on the system.

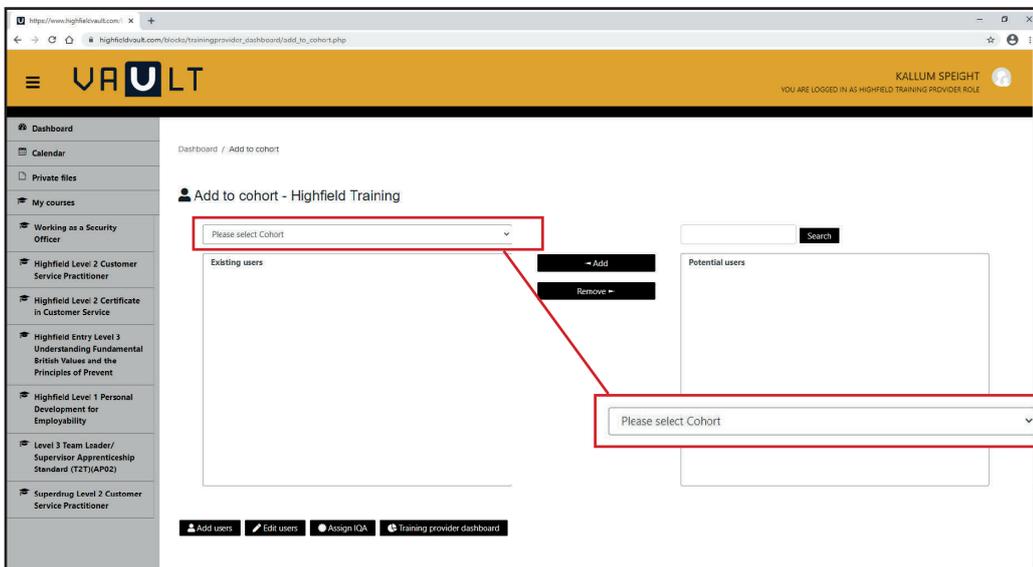
# Adding an existing user to a cohort



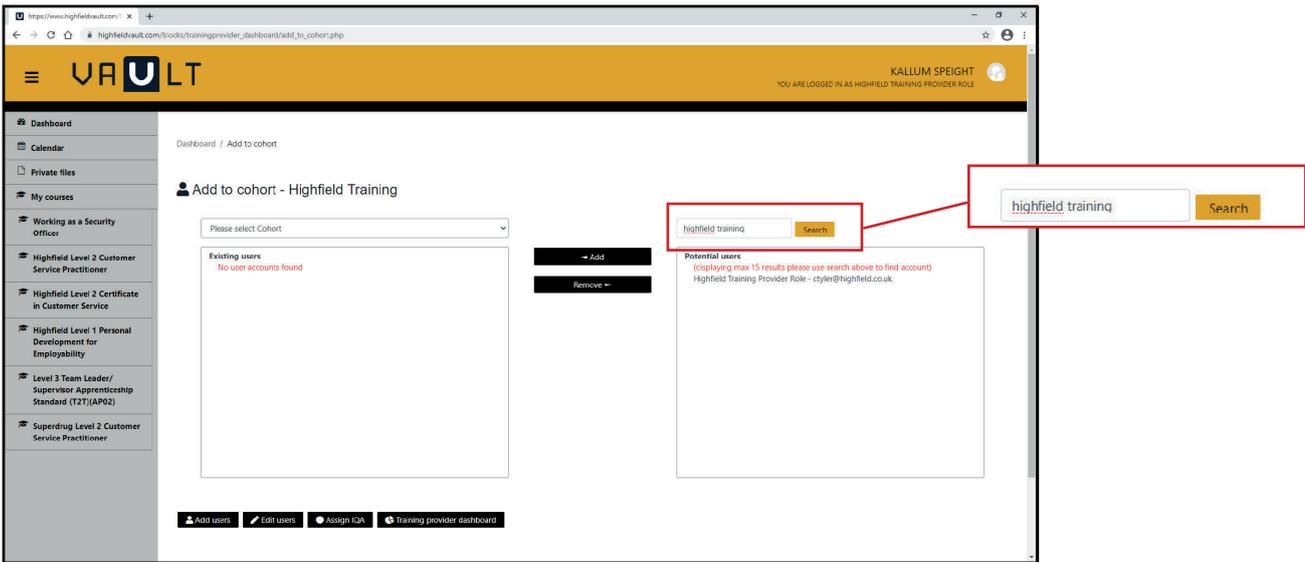
Once logged into Vault, you will be taken to the dashboard. To add an existing user to a cohort, you will need to click on the 'Add to a cohort' button which is located on the right-hand side of the screen.



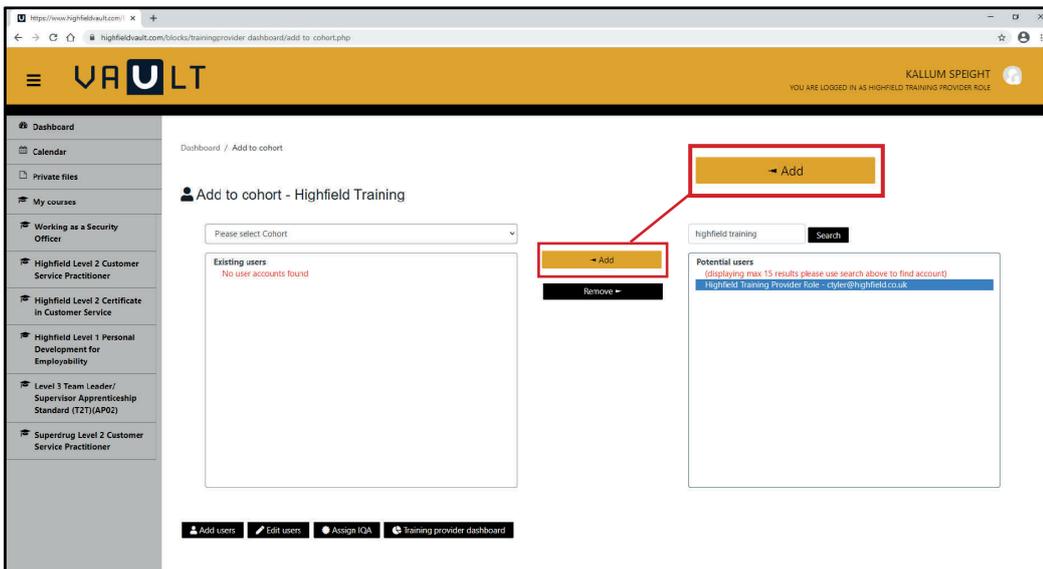
From here you will be able to select the cohort you wish to add the learner to from the dropdown on the left of your screen.



Once you have selected your cohort, you will see a list of users already attached to the cohort on the left under '**Existing users**' and you can use the search on the right to locate the learner you wish to add.



Once you have used the search to locate the learner, click on the learner's name and then click '**add**' in the middle of the screen. You will then see the page refresh and the user will appear under '**Existing users**' on the left. You can repeat this process to add further users or click back to '**Dashboard**' which is located on the left-hand side menu, to return to the main dashboard.



## Removing a user from a cohort

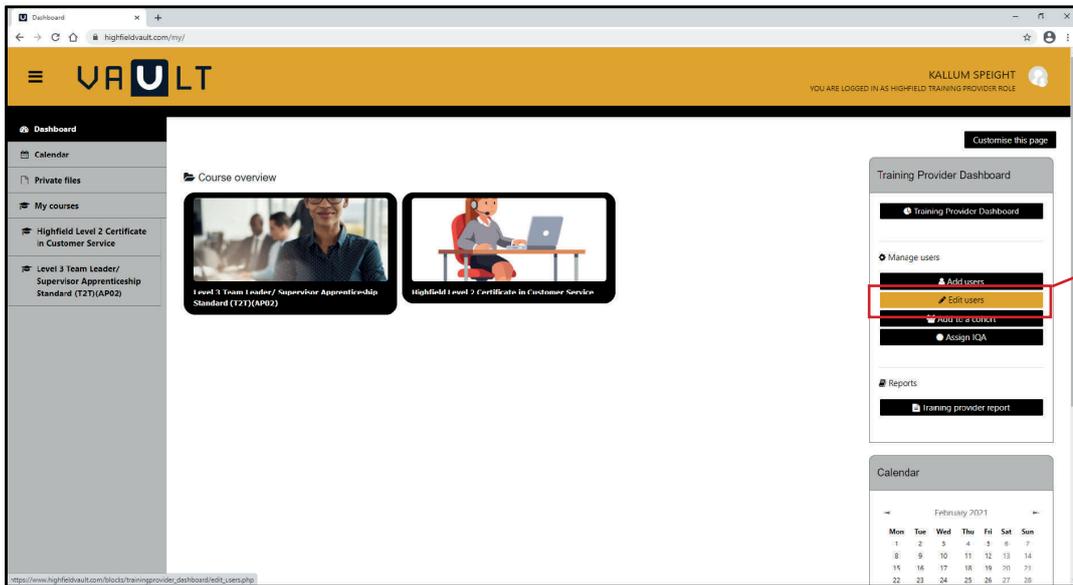
To remove a user from your cohort, please follow the steps above, however, this time click the user you would like to remove from the **'Existing users'** section and click **'Remove'**.

The screenshot displays the VAULT training provider dashboard. The main content area is titled "Add to cohort - Highfield Training". It features a dropdown menu for the cohort, currently set to "Highfield\_training\_demo". Below this, there are two sections: "Existing users" and "Potential users". The "Existing users" section contains a list with one user: "Highfield Training Provider Role - ctyle@highfield.co.uk". A red box highlights this user, and a red arrow points to a "Remove" button. The "Potential users" section is empty, showing "No potential user accounts found". A red box highlights the "Remove" button in this section as well. A zoomed-in view of the "Existing users" list is shown below the main screenshot, with a red box highlighting the user name and email.

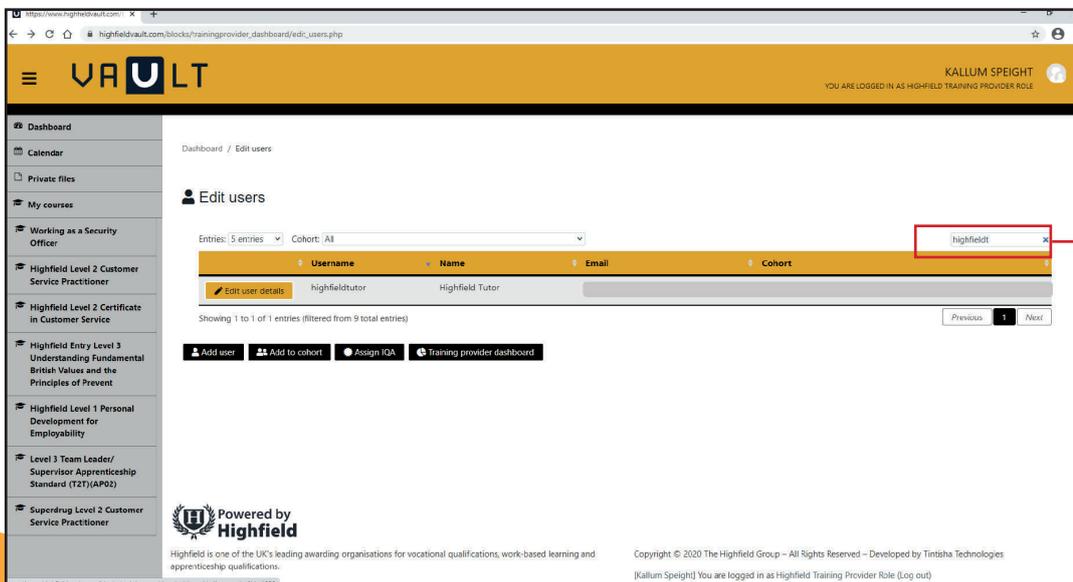
# Edit users and resetting passwords



From your main dashboard, select **'Edit users'** on the right of your screen as shown below.



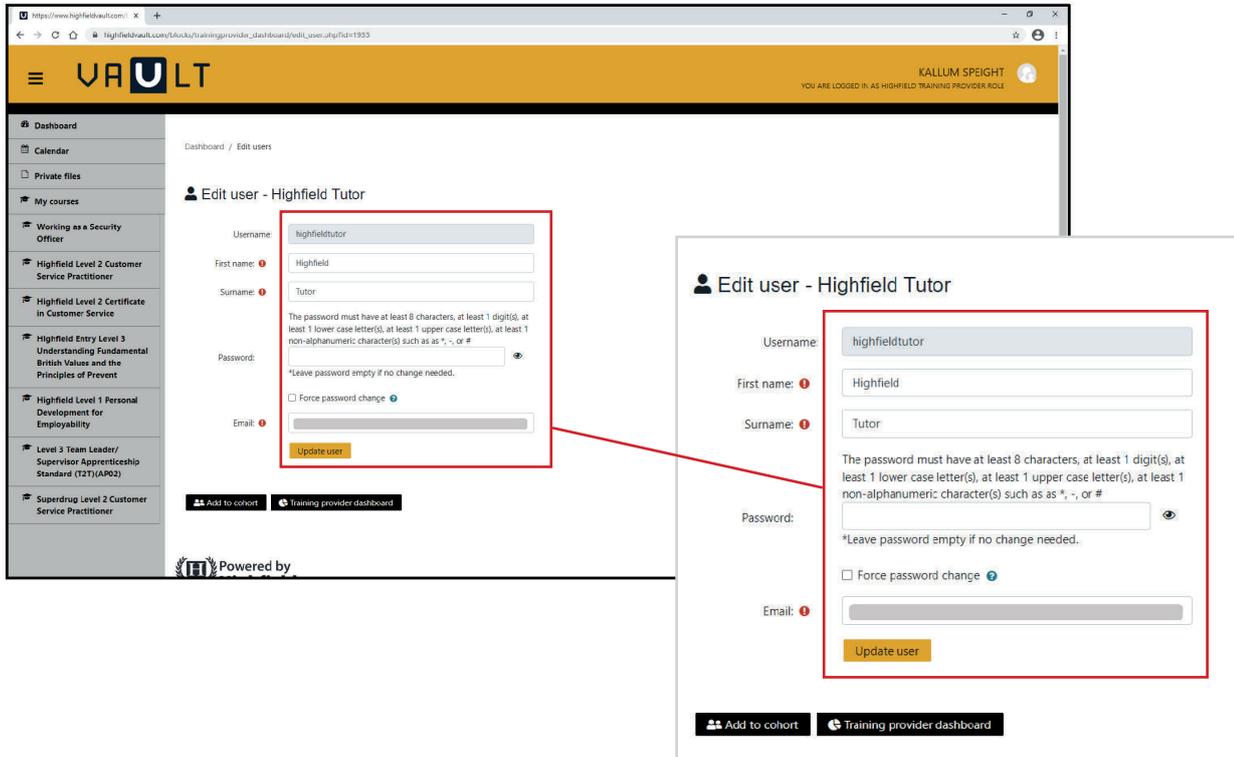
In the **'Edit users'** screen you can use the search on the right to locate the user you wish to edit the details of, and once located, you will need to search for the user you would like to edit by using the search bar. From here you will need to select **'Edit user details'**.



From here you will be able to edit the following details.

- First name
- Last name
- Change password
- Email address

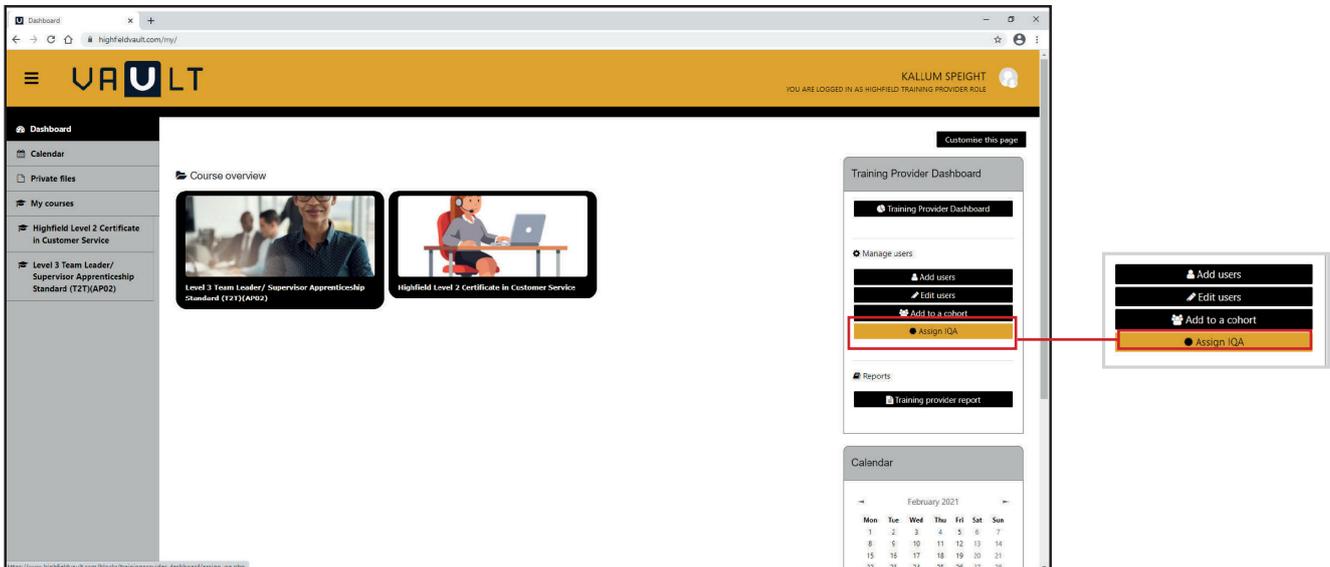
If you need to amend a Username, please contact the Highfield Vault team. Once you have finished updating the user's details click '**Update user**' to save your changes.



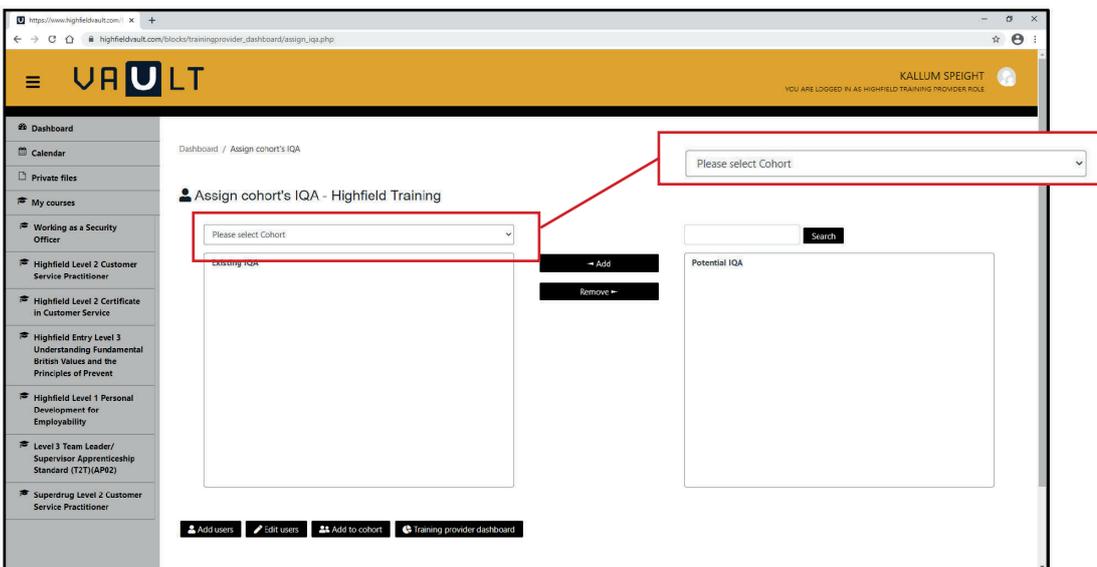
# Assigning an existing IQA to a cohort



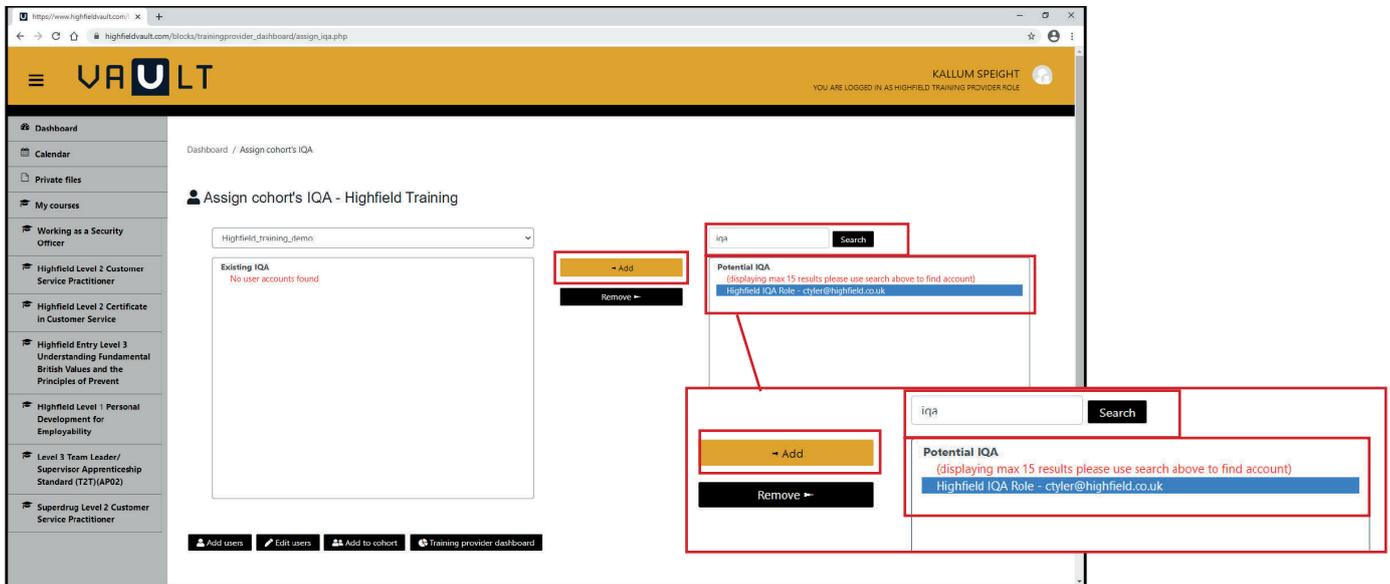
On the main dashboard, select **'Assign IQA'** on the right-hand side of the screen.



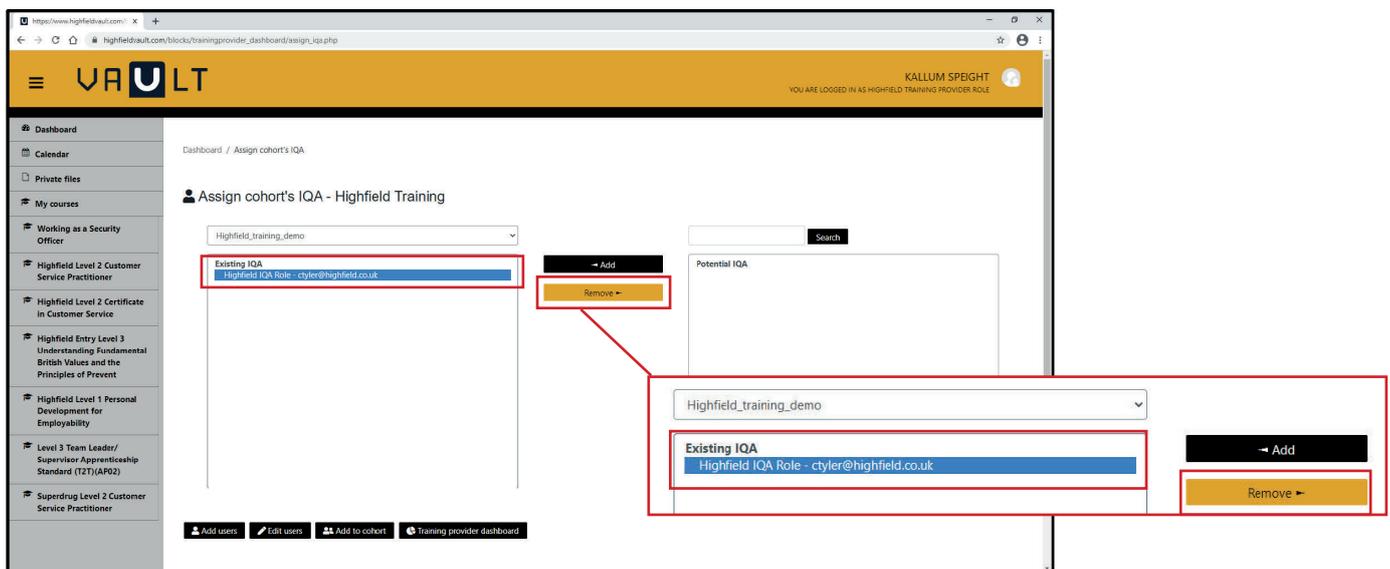
In the **'Assign cohort's IQA'** screen please use the dropdown to select the cohort you wish to allocate an IQA to (you can allocate more than 1 IQA).



Once you have selected the cohort, please use the search on the left of the screen to find the user. Once located, click on the user's name and then 'Add' in the middle of the screen. The page will refresh and you will see the IQA under 'Existing IQA' to the left. To allocate an additional IQA, you can repeat the process or return to the dashboard by clicking 'Dashboard' on the left-hand side menu.



## Removing an IQA from a cohort



To remove an IQA from your cohort, please follow the above steps, however, this time click the user you would like to remove from the cohort from the 'Existing users' section and click the 'Remove' button.



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**For more information or to book a demo, contact us:**  
01302 363277 | [info@highfieldvault.com](mailto:info@highfieldvault.com) | [www.highfieldqualifications.com/vault](http://www.highfieldqualifications.com/vault)