# MINITAB EDUCATION HUB

License Administrator Guide

# Education Hub™

## Welcome to the Minitab Education Hub!

This guide walks License Administrators through all administrative functionality such as, creating users, assigning licenses to users, and enrolling users in learning paths. License Administrators will also learn how to view and export reports.

## Table of Contents

![Education Hub]

# Signing In

The Minitab Education Hub can be accessed at https://www.minitabeducationhub.com/.

- Click **SIGN IN**, located in the top right corner of the homepage.
  - Enter your username (work/academic email address) and password into the login form and press **Sign In**.

  - You can set or reset your password by clicking '**Forgot your password?'**.
    - *NOTE: Single Sign On (SSO) is not available.*



- Upon logging in for the first time, users will be prompted to read and agree to Minitab's Privacy Policy and Subscription Agreement.

- Users will also be prompted to populate required fields:
  - First Name, Last Name, and Country (if fields weren't populated during user creation by the License Admin)

- Once logged in, the **Personal Information** fields can be updated at any time by selecting the **User Menu** in the top left corner of the screen and selecting the **My Profile** icon.
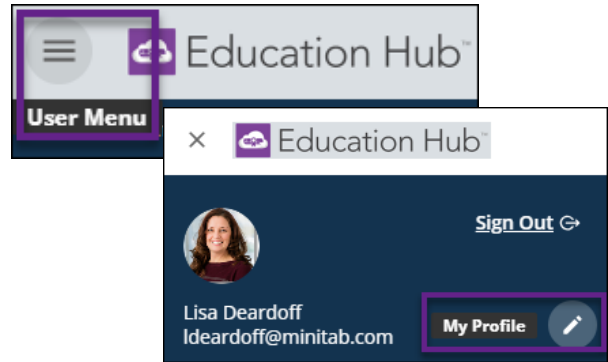
- Under **My Profile**, users can:
  - update personal information.
  - change password.
  - select preferred language and time zone.
  - review the Privacy Policy and the Subscription Agreement.

- After saving changes, press the Education Hub logo to be taken back to the License Admin Homepage.
  - The breadcrumb trail can also be used for navigation at any time.
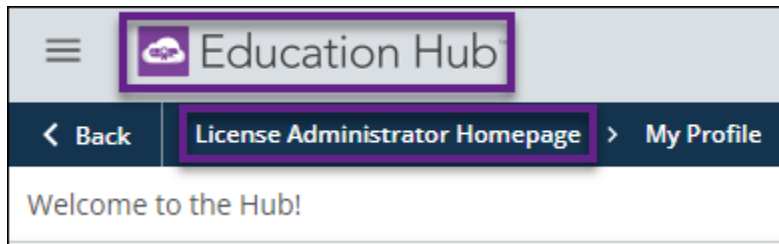
Upon first login, License Administrators and Learners will not have access to the content until a license has been assigned and they have been enrolled in Learning Paths. License Administrators do not need a license assigned unless they wish to be enrolled in Learning Paths to view the content. All users will see the screen below until enrolled in Learning Paths.
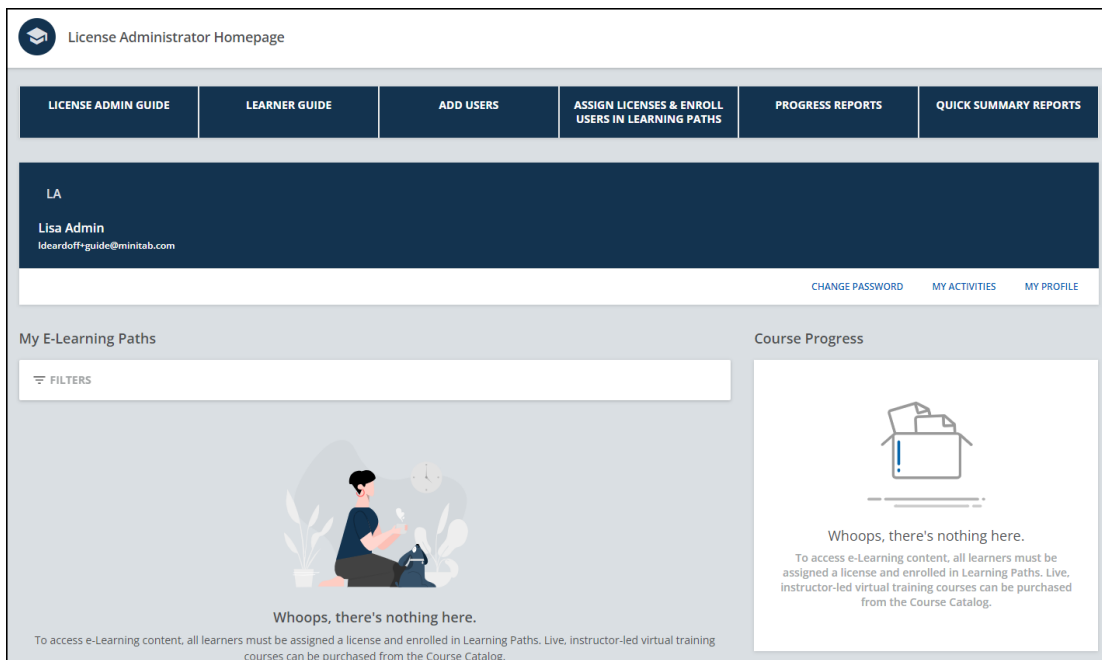
# Creating New Users

License Administrators can create new users (one at a time or in bulk), deactivate users, delete users, and perform bulk edits.

*NOTE: License Administrators cannot create other License Administrators. If an additional License Administrator is required, please see the Additional License Administrator section for more information on this topic.*

**Create one user at a time:**

1. Access the **Admin Menu** by clicking the **gear icon** in the upper right corner and selecting Users.

*NOTE: License Administrators will not see their own user account in this area. If you have logged into the Hub, then an account has been created for you already. Do not try to create your account again.*
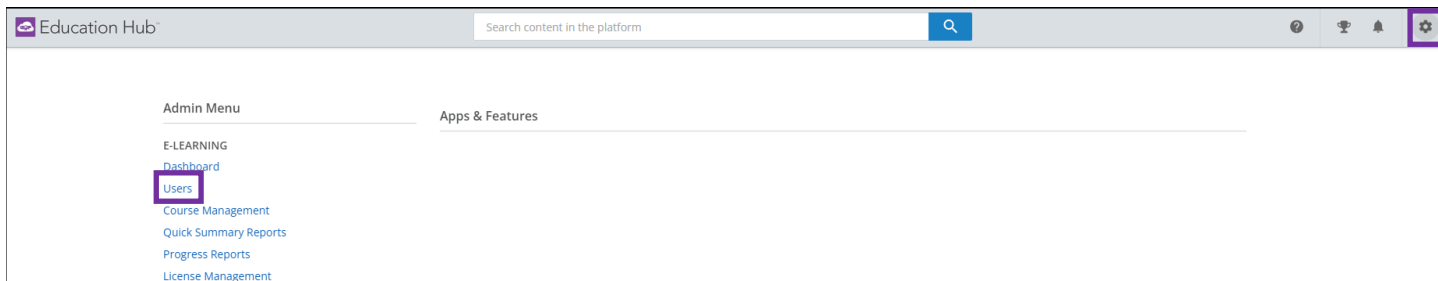


2. In the upper right of the **Manage Users** page, press the **green plus** button, and click the **New User** option.
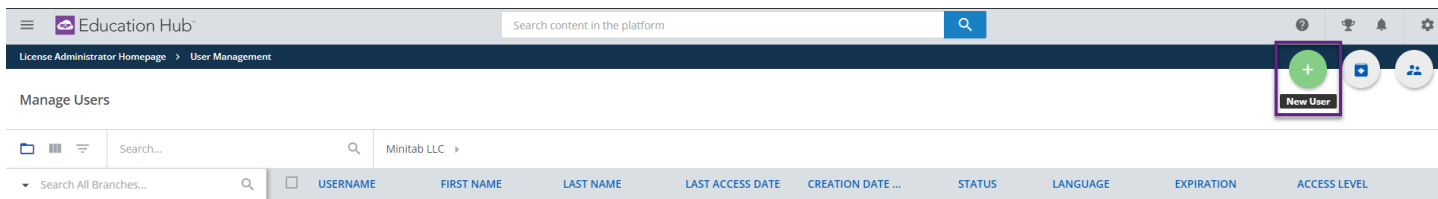


3. In the slide-out panel, populate the fields on the **General Information** page (see screenshot below).

   *NOTE: The only required fields are Email/Username and Password (either auto populated or manually created).*

   o **Email/Username:** Populating the Email field auto-populates the Username field. These fields must match.
   o **Access Level**: Defaults to user and cannot be changed.
   o **First and Last Name:** Can be populated or left blank as the user will be prompted to populate upon first login.
   o **Password**: Auto-populates but can be overwritten.
   o **Force Users to change password at first login**: Select this option if desired.
   o **Expiration**: Populate the expiration date to remove ALL access to the Hub on a set date.
   o **Activate user at the end of creation process:** Select this option to set the user as "active" upon completion of filling out all pages of the new user form. The default setting is "activate".
   o **Send "Welcome" email at time of creation**: If enabled, the new user is sent an email that alerts them of their Hub access and prompts them to set up their password. If disabled, this email cannot be sent later.
   o **Language and Time Zone**: These can be populated or left blank. Users can edit these fields at any time under their My Profile area.

4. Press **Next** to continue to the second page, **Branches**.
   o A branch is simply a folder with your company name that houses your users.

5. Select your company **Branch** by clicking on the blue arrow to the right of the *External* folder: 



6. Select the folder with your company name.



*NOTE: Minitab LLC > External will be the default path for all Branches.*

7. Click **Next** to proceed to the **Additional Fields** page.

8. **Country/Region** can be populated or left blank as the user will be prompted to populate upon logging in for the first time.



9. Click **Next** to arrive at the **Team Members** page. This is not a functional area at this time and can be disregarded.

10. Click **Create User** to finish the user creation process.
    o All new users are automatically sent the new user notification email.

*NOTE: The notification email will not be sent if the "Send Welcome email at time of creation", located on the General Information tab, is toggled off.*



*NOTE: Users will not have access to content until assigned a license and enrolled in Learning Paths.*

# Bulk Importing Users

License Administrators can add multiple users to the Education Hub via a bulk import.

*NOTE: License Admin accounts are created by Minitab. If you have logged into the Hub, then your account has already been created. Check your import spreadsheet to make sure your License Admin account is NOT listed in the import sheet.*

1. Access the **Admin Menu** by clicking the **gear icon** in the upper right corner and selecting Users.
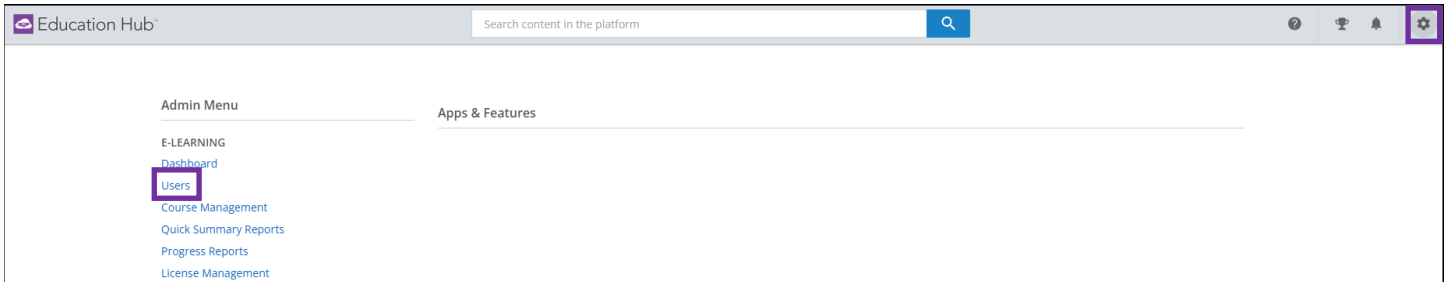


2. At the top of the **Manage Users** page, select the **Import Users** button, and click **Import Users via CSV**.
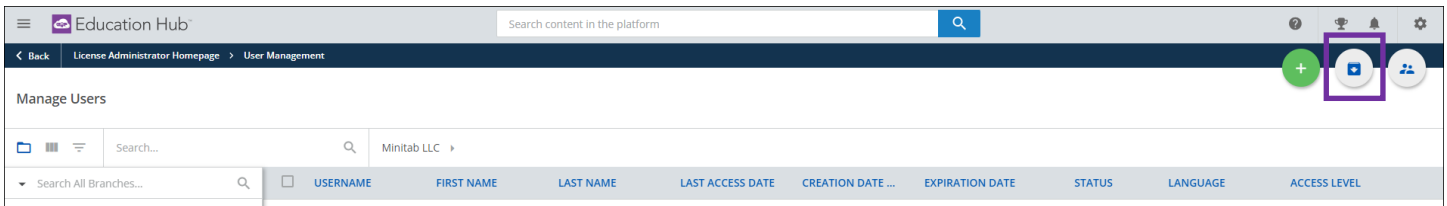


- License Administrators can select **Download the Sample CSV** to use this as a template for creating the user import list, however, not all fields in the Sample are needed (see Step 3 for requirements).

- The maximum file size of a CSV file for user import is 3MB.

3. ONLY Email, Username, and Branch Name (company name) are required for the import.
   - Upon first login, the user will populate the remaining fields (first and last name, country, and language).

| A | B | C |
|---|---|---|
| Username | Email | Branch Name |
| mary.smith@example.com | mary.smith@example.com | COMPANY NAME |

- Enter all user email addresses in the **Username** column and in the **Email** column as they must be the same.

- Enter your company name in the **Branch Name** column.
  *NOTE: This must be entered exactly as listed in the Hub. This can be seen under the Admin Menu > Users. Click on the blue arrow next to the folder named External to view your company name.*



- Remove all remaining columns if using the Sample CSV.

4. Click **Browse** to select and upload the CSV file to the Hub.

5. Once uploaded, press **Advanced Settings**.

6. Toggle **Consider first row as header** to on. For standard imports, leave the File Charset set to the default of UTF-8.
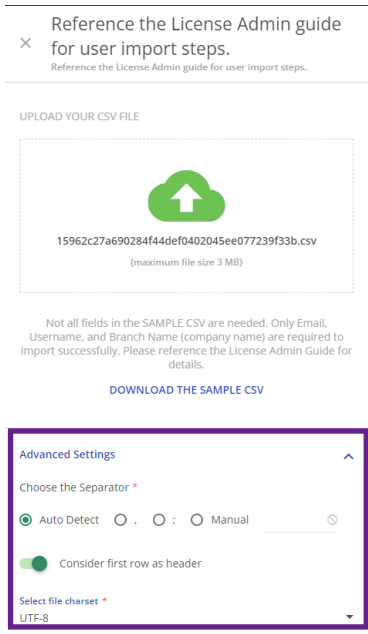


7. Press **Confirm** to advance to the data source mapping page.

8. The **Preview** section on the right displays a preview of your CSV file, auto-mapped by the system. Drag and drop the fields from the **Education Hub Fields** section on the left to match your CSV fields on the right.

9. In the left panel, under **Profiles**, configure the following options:
   o In the **Preset** section, select **save this preset as new** to save your current field mapping to be used for future imports.
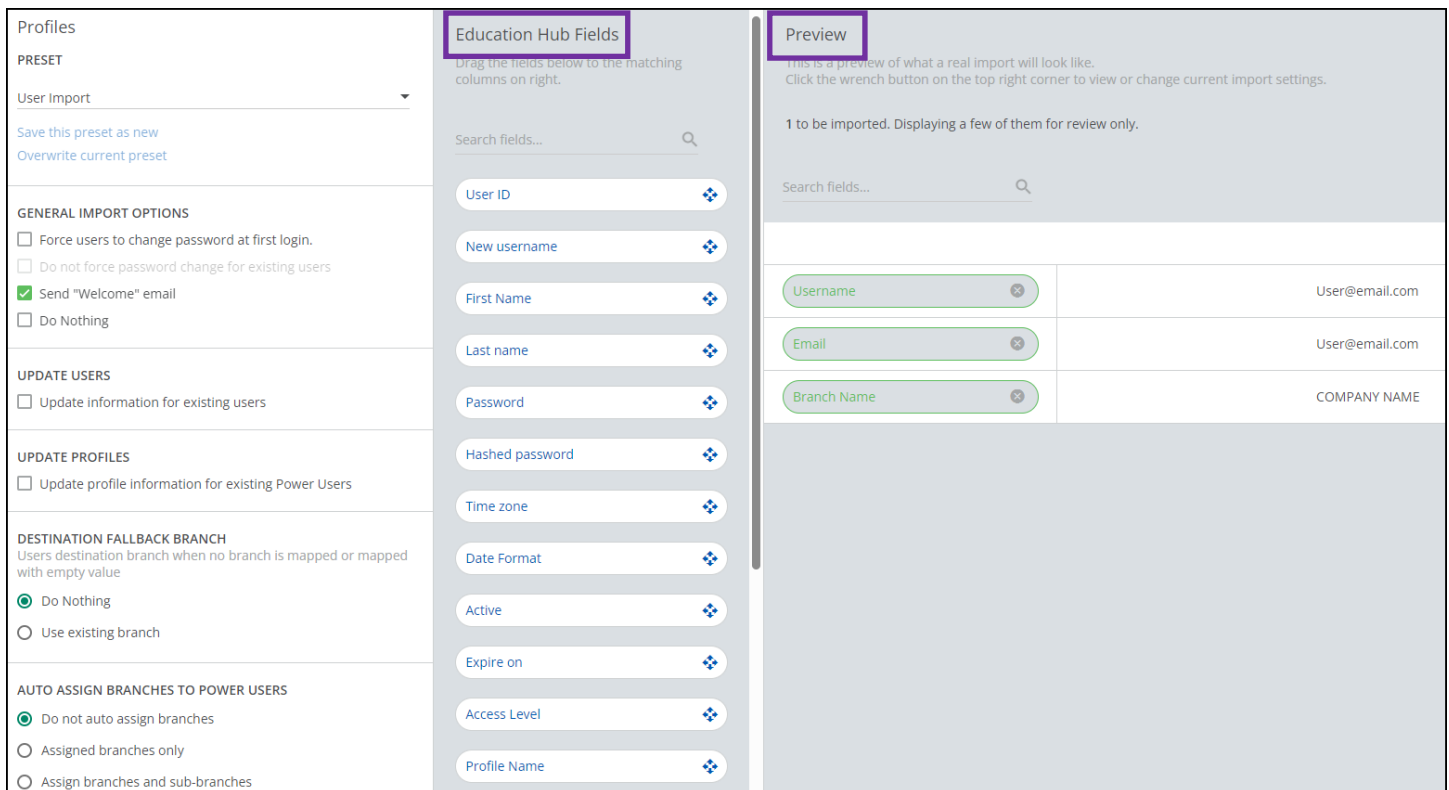
o The **General Import Options** section gathers several parameters concerning the import procedure:

- **Force users to change password at first login:** When this option is enabled, *new* users will immediately be asked to change their password after the initial login to the Hub.

- **Do not force password change for existing users:** When enabled, any *existing* users in the Hub that also exist in the newly-imported CSV file will not be forced to update their password.

- **Send "Welcome" email:** When enabled, all users imported into the Hub will receive the "Welcome" email once the import is complete. If this option is not enabled, the users *will not* receive the email and the email cannot be manually sent at a later date.

- **Update Users**: Allows you to configure how the information of existing users will be updated upon importing the CSV file. When enabled, the imported information for users already existing in the Hub *will overwrite* any existing user information.

- The **Update Profiles** option is used to change License Admin access and does not apply here.

- The **Destination Fallback Branch** is used when the branch field is not mapped in the *Preview* area, or when it is mapped, but its value is empty. Leave the default setting of "Do Nothing".

Profiles

PRESET

Presets ▾

Save this preset as new
Overwrite current preset

GENERAL IMPORT OPTIONS
☐ Force users to change password at first login.
☐ Do not force password change for existing users
☑ Send "Welcome" email
☐ Do Nothing

UPDATE USERS
☐ Update information for existing users

UPDATE PROFILES
☐ Update profile information for existing Power Users

DESTINATION FALLBACK BRANCH
Users destination branch when no branch is mapped or mapped with empty value
◉ Do Nothing
○ Use existing branch

AUTO ASSIGN BRANCHES TO POWER USERS
◉ Do not auto assign branches
○ Assigned branches only
○ Assign branches and sub-branches

- The **Auto Assign Branches to Power Users** area is not applicable and can be left at "Do not auto assign branches".

10. Once the Preview fields are mapped and the General Import Options are set, press **Import** in the bottom right corner. Confirm the details in the popup message that appears and click **Import Users**.

o You may navigate away from this page while the import job runs in the background. If errors occur during import, an error file can be downloaded from the Admin Menu > Background Jobs.

o All newly imported users will appear in the list of users on the Manage Users page.

*NOTE: Users will not have access to content until assigned a license and enrolled in Learning Paths.*

# License Management

**Once users are created in the Hub, the License Administrator <u>must</u> assign licenses to users and enroll users in the desired Learning Paths. The following two steps grant users access to the content.**
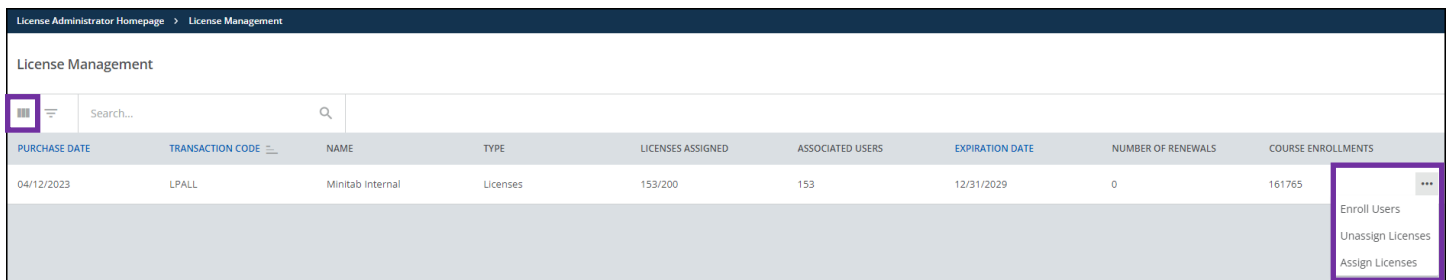
## Assign Licenses

1. Access the **Admin Menu** by clicking the **gear icon** in the upper right corner and selecting License Management.
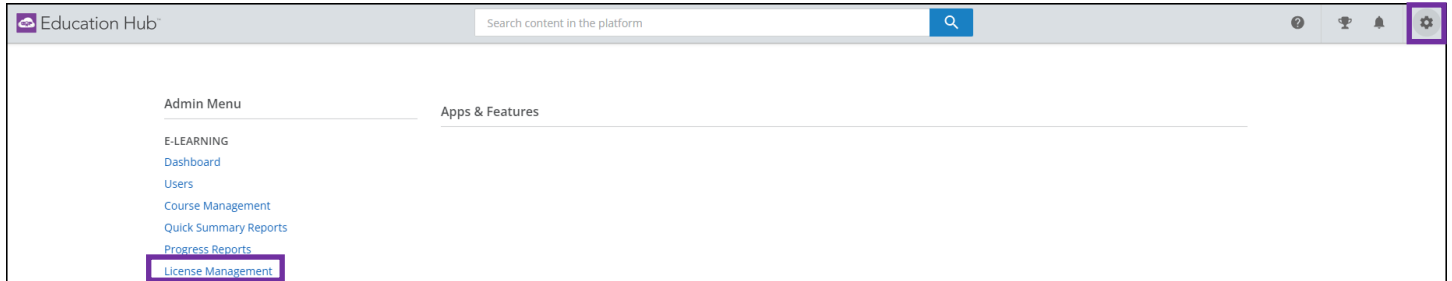


- o All purchased subscriptions for your company will be displayed on this screen.

- o The Purchase Date and Expiration Date correspond to your Education Hub subscription purchase.

- o The Licenses Assigned column shows the number of licenses assigned out of the total number of licenses purchased/available.

- o The Associated Users column reiterates the number of licenses assigned.

- o Show or hide columns by checking and unchecking column names via the column selection icon.
    - ▪ A maximum of ten columns can be displayed at once. You may need to uncheck a column to be able to select a different column.

2. Assign licenses to users by clicking the ellipses at the end of the row and selecting **Assign Licenses**.



3. Select the appropriate users and click **Confirm** in the lower right corner. This assigns a license to each user selected.
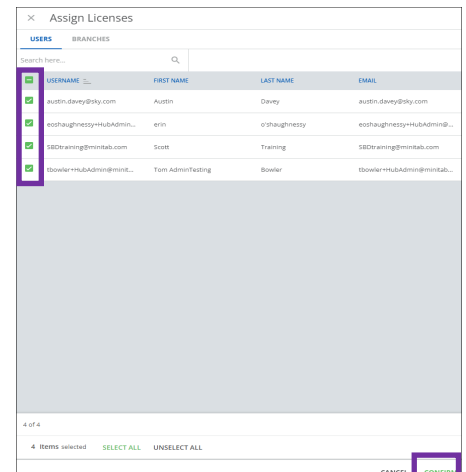


*Once users have been assigned licenses, grant access to content by enrolling the users in Learning Paths.*

## Enroll Users

1. While still on the [License Management](#) page, click the ellipses at the end of the row and select **Enroll Users**.
   - Only users assigned to a license display in this list.

2. Select the appropriate users and click **Next**.

3. From the **Select Learning Paths** page, select the desired Learning Paths, in the appropriate language, that should be granted to the users you have selected > Click **Next**.
   - You may assign all Learning Paths purchased to your users or pick and choose which Learning Paths each user should have access to.
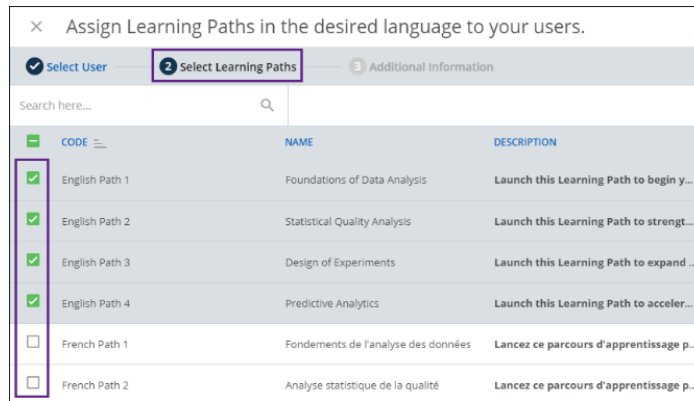


4. Under the **Additional Information** page:
   - Leave the Access Level set to the default of Student.
   - Click **Confirm**.
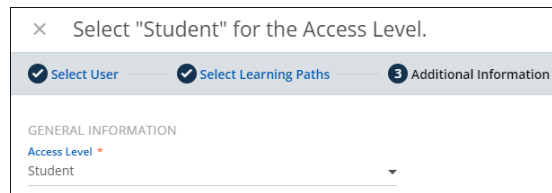


5. Once complete, users will see their assigned Learning Paths on the **Learner Homepage**.
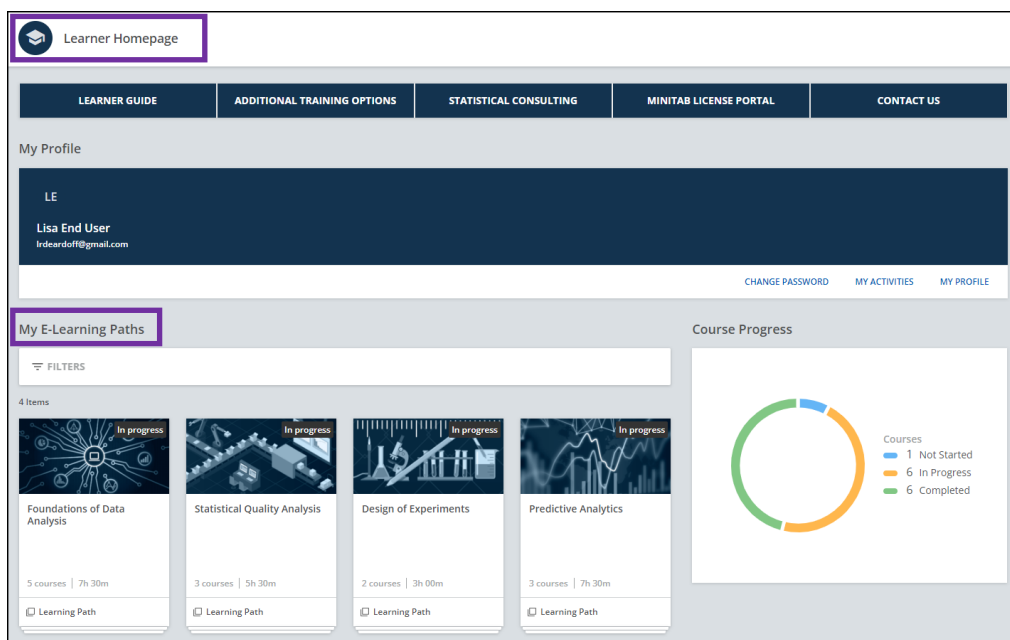
### Unassign and Reassign a License

License Admin may unassign a license from a user and reassign it to another user. This may occur when a user has left the company or completed the content, and you want another user to have access to the content. When a license is unassigned from a user, the Learning Paths and Courses will display as locked, and that user will no longer have access to the content.

1. Access the **Admin Menu** by clicking the **gear icon** in the upper right corner and selecting License Management.

2. Click the ellipses at the end of the desired row and click on **Unassign Licenses**.
   o Only those users with an assigned license will display.

3. Select the desired user and click **Confirm**.
   o This unassigns the license from the user and locks access to the content.

4. The **Licenses Assigned** and the **Associated Users** columns will reflect the new total number of license assignments.

5. You may then assign that license to another user if desired.

## User Management

### Edit & Delete Users

License Administrators can create and edit users in the Hub, but they are not able to create or edit another License Admin.

1. Access the **Admin Menu** by clicking the **gear icon** and selecting Users.

2. From the **Manage Users** page, use the Search feature to locate the desired user.

3. To edit a user's details, press the ellipsis button at the end of the user's row and select **Edit**.
   o In the slide-out panel, make desired changes and press Update.

4. To delete a user, press the ellipsis at the end of the user's row and select **Delete**. The user and all course progress data will be deleted. This operation *cannot* be undone.
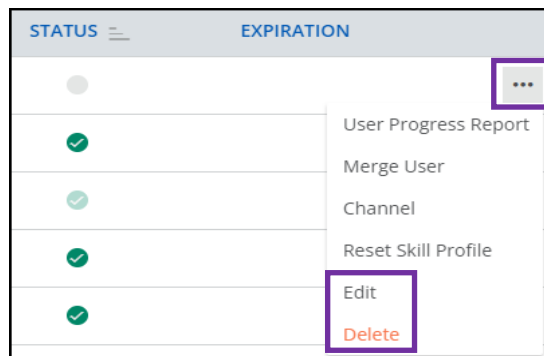


### Additional License Administrator

By default, when your Hub account is created, one License Administrator and one company-named Branch is created. License Administrators cannot create other License Administrators. If you have a large number of users and need more than one License Administrator, please send a request to Minitab Technical Support that includes the *Name* and *Username* of the new License Administrator.

## Bulk Actions for Users

License Administrators can perform the same action on a group of users, such as changing branches, exporting user details, and changing user status.



1. Access the **Admin Menu** by clicking the **gear icon** in the upper right corner and selecting Users.

2. From the **Manage Users** page, select the users you would like to involve in the action by checking the box next to each username and click **Choose Action** in the bottom right corner.
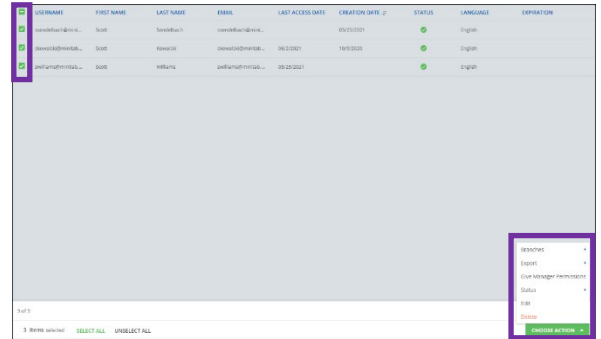
3. Choose one of the available actions to perform on all selected users:
   o *If you have more than one Branch:* select **Branches > Move to Branch.** This will move the selected users to another branch. In the slide out panel, select the branch in which you want to place the selected users, and press Confirm. Users can only live in one branch.

   o *If you have more than one Branch:* select **Branches > Remove from Branch.** This will remove the selected users from that branch. In the slide out panel, select the branch from which you want to remove the selected users, and press Confirm. Keep in mind that you cannot remove users from the main branch.

   o **Export > Export as CSV or XLS.** Use this option to export the list of the selected users to CSV or XLS.

   o **Status > Activate or Deactivate.** Select this action to activate or deactivate one or more users. Keep in mind that when a user is deactivated, the license is removed from that user. If the user is reactivated, you will need to reassign a license to the user.

   o **Edit.** Bulk change user fields such as: password, user expiration date, language, time zone, and country.

   o **Delete.** This command permanently deletes all selected users along with their course progress data. This operation *cannot* be undone.

## New user notification email

- The **Welcome to the Hub** email is automatically sent to *all* users at the time of creation. Users are directed to click the *Reset Your Password* link where they can enter their username (work or academic email address) and click Send Link.
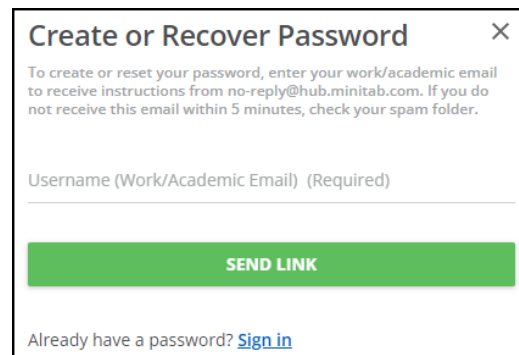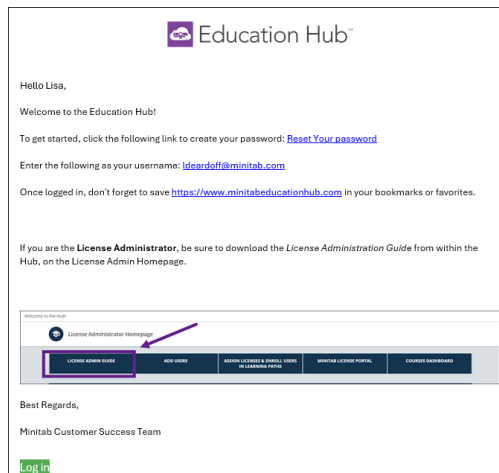


- Users will then receive an email with a link to create their password.

## User Status

All users in the Hub have a status of either active, expired, or deactivated.

1. To view or edit a user's status, navigate to Users from the Admin Menu.



- o Green circle with grayed out checkmark = YOUR status, Active. You are not able to edit your own status.
- o Green circle with solid checkmark = Active user
  - ▪ User can log into the Hub.
- o Orange triangle with exclamation mark = Expired user, expiration date is displayed
  - ▪ User cannot log into the Hub.
- o Gray circle = Deactivated user
  - ▪ User cannot log into the Hub.
  - ▪ User will not receive the Welcome email.
  - ▪ The license is automatically removed when the user is deactivated.

2. Users can be deactivated by clicking the solid green circle shown in the status column.

3. Users can be reactivated by clicking the grey circle shown in the status column.
   *NOTE: When reactivating a user, you must reassign a license to that user in order for the user to view any content. If a license is not reassigned to the user, the Learning Paths and Courses will display as locked for that user.*

4. To remove an expiration date (orange triangle status): click the ellipsis to the right of the user > select **Edit** > click the **X** to remove the expiration date or reset the expiration to a later date if desired > click **Update** to save.

# Branches

During the setup of your Education Hub subscription, a branch is created for your company. A branch is essentially a folder that houses your Hub users. Your branch name is the same as your company name.

## Sub-Branches

If you have a large number of users and require an additional branch, a sub-branch can be created within your branch to separate groups of users. License Administrators do not have the ability to create sub-branches. Please contact Minitab Technical Support to inquire about creating a sub-branch.

A License Admin can be assigned to their own sub-branch where they have full License Administrator access, but only to the users in that sub-branch. While they will not see other sub-branches or users in those sub-branches, they will see any users that are in the main company branch.

The License Admin in the main company branch has access to the main branch, all sub-branches, and all users in all branches.

# Course Management

License Administrators can manually edit each course to mark a user's status as complete, enter a completion date and list an overall course score. This is accomplished by editing one or multiple users at a time, in each course.
*Please note that updating individual user progress is a manual process and cannot be completed via import.*

1. Access all e-learning courses by selecting **Admin >** Course Management.
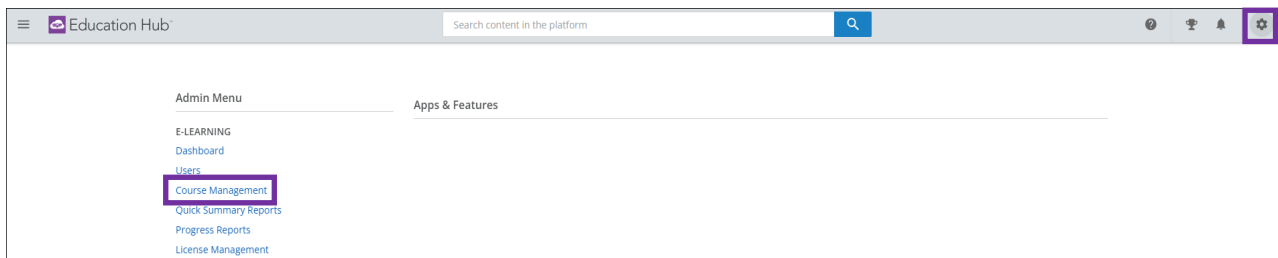


2. On the Course Management page, use the filter option to narrow down the list of courses and only view the courses where user enrollment will be edited.
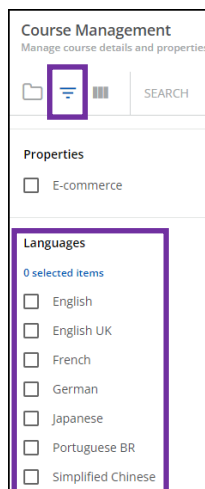


3. Show or hide columns by checking and unchecking column names via the column selection icon. A maximum of ten columns can be displayed at once. You may need to uncheck a column to be able to select a different column.
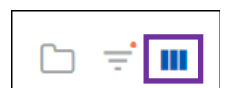
4.  Under the **Enrollments** column, in the same row as the desired course, select the link to navigate to the list of users enrolled in that specific course.



5.  From the **Enrollments** page, use the Search feature to locate the user you want to edit, press the ellipsis button at the end of the user's row and select **Edit Enrollment**.
    o   Change the **Enrollment Status** to Completed
    o   Enter the **Completion Date**
    o   Check **Set Score Manually** and enter in the **Final Course Score**



6.  Click Confirm to save and close.

7.  Continue with the next user until all users have been edited for this course.

8.  Repeat these steps for users in other courses.

*NOTE: To edit multiple users at once, from the Enrollments page, use the green checkboxes to multiselect users. Once users are selected, use the CHOOSE ACTION button to edit enrollment. This option will set the same Status, Date, and Score for all users selected.*

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## Navigating Learning Paths and Courses

A Learning Path is a series of related courses designed to target a specific topic or area of interest. On the homepage, users see only the Learning Paths in which they have been enrolled. Users will not see Learning Paths until the License Administrator has assigned the user a license and enrolled the user in desired Learning Paths.

*NOTE: License Administrators will not see any content in this area unless they assign themselves a license and enroll in a Learning Path.*

For a detailed, downloadable, full course outline, please visit Minitab.com.



- Select any **Learning Path** to read the description and view the corresponding courses.



- Select any **Course** tile to access that course.

- Inside each course, the **Course Details** and estimated **Course Duration** are located at the top of the screen.

- On the right side of the screen, you will see the table of contents listing the different **Sections**.
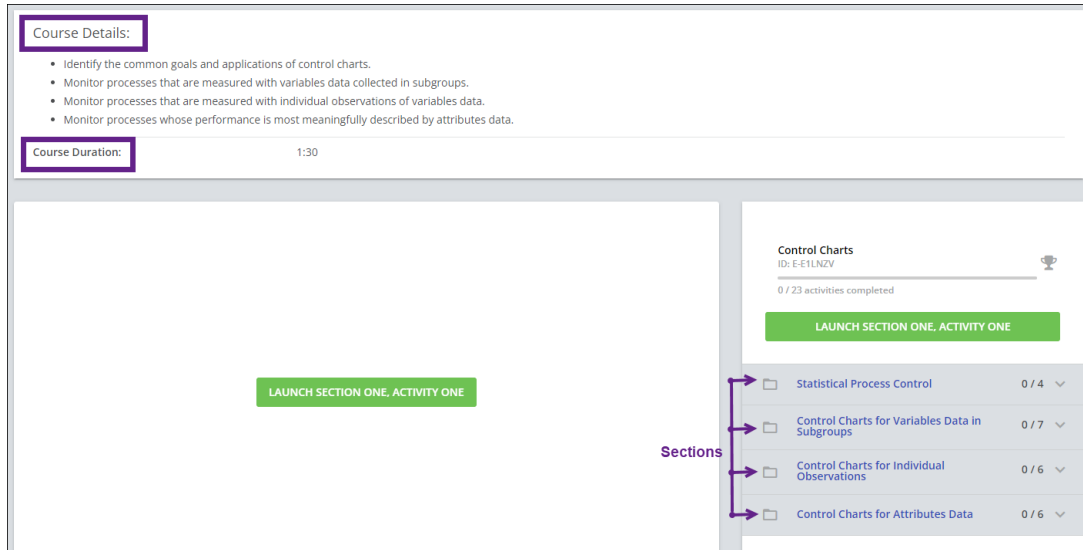


- Click the dropdown arrow of each **Section** to see the **Activities**. Click an **Activity** to begin learning.
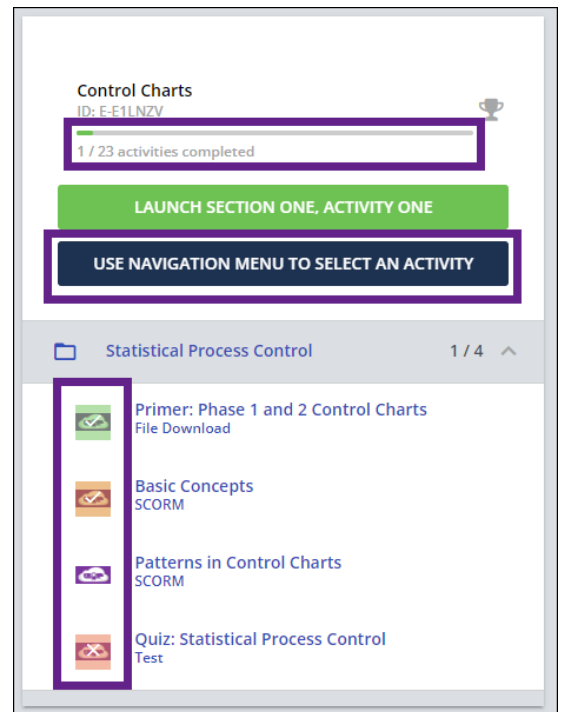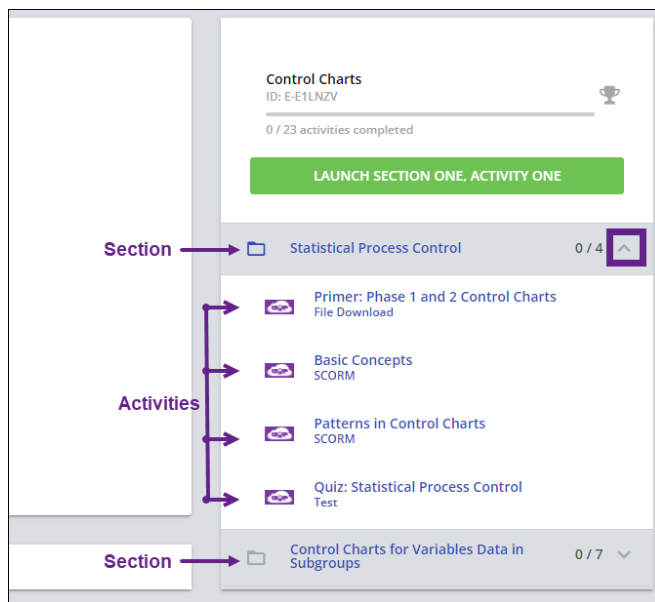


- Activity Status
  - Completed = green with check mark
  - In Progress = orange with a check mark
  - Not Started = purple
  - Quiz Not Passed = red with an X

As activities are completed, the activities bar and total number of Activities Completed increases. Should the activities not display as complete after viewing the tutorial, turn off popup blockers in your browser.

The *Use Navigation Menu to Select an Activity* button appears once you've begun learning.

# Earning Completion Badges and Certificates

- Users are awarded a badge for each course that is completed.
    - Badges can be viewed in the My Activities section of the User Menu, under the Badges tab.



    - Badges can also be viewed via the Gamification icon in the upper right corner of the Hub.

- Once all courses and associated sections' activities in a Learning Path are complete, users will be awarded a **Certificate**. Certificates can be viewed and printed from two areas:

    - within the Learning Path itself



    - or under the **User Menu** > **My Activities** > Learning Paths tab.
        - Click on the award icon to view and print a certificate.

# Viewing Reports

License Administrators can view **Quick Summary Reports** and **Branch Progress Reports** to analyze user progress and course data. Report data is near real-time and refreshed every hour. All reports can be exported to CSV or XLS where data can be sorted and filtered.

- Access the **Admin Menu** by clicking the **gear icon** in the upper right corner and selecting Progress Reports.
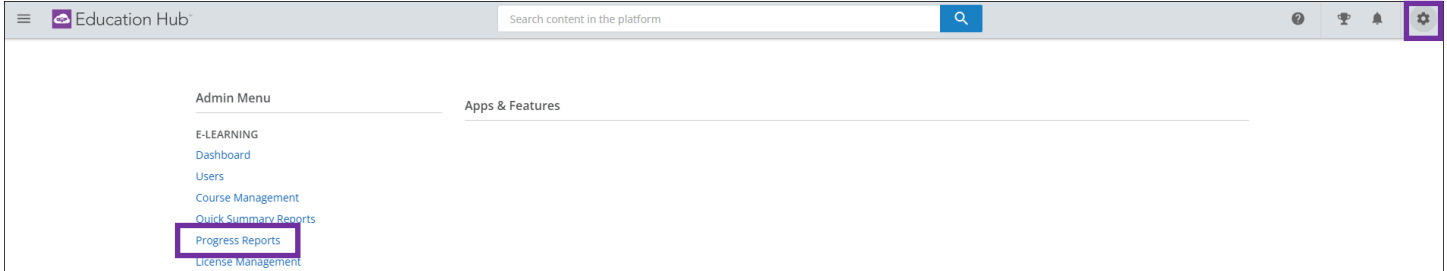


- Generate reports on the **Quick Summary Reports** tab to search for a *specific* user or course to view all associated details.
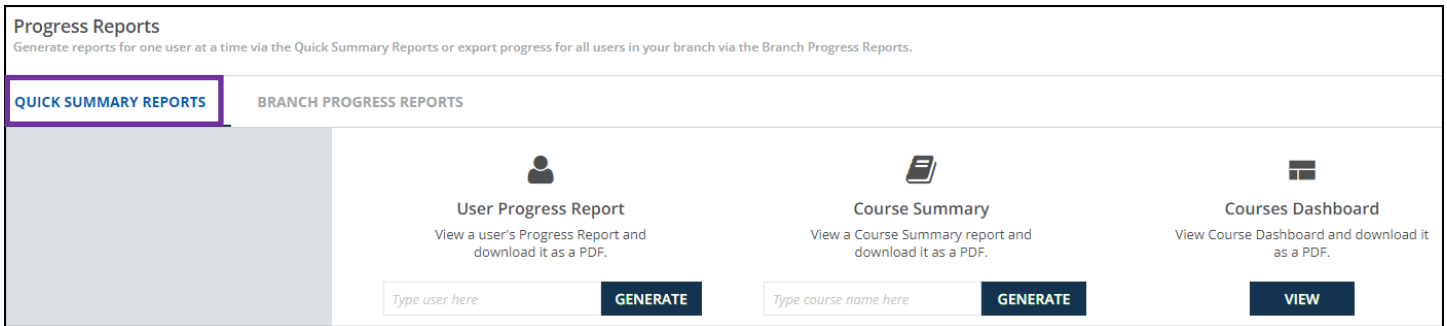


- To view the **User Progress Report** for a specific user, enter the user's first name, last name, or email address to search for and select the desired user.

    o Click Generate to view that user's My Activities page.

    o Toggle through the tabs on the left side of the report to view different details.

    o The entire report can be printed or downloaded as a PDF.
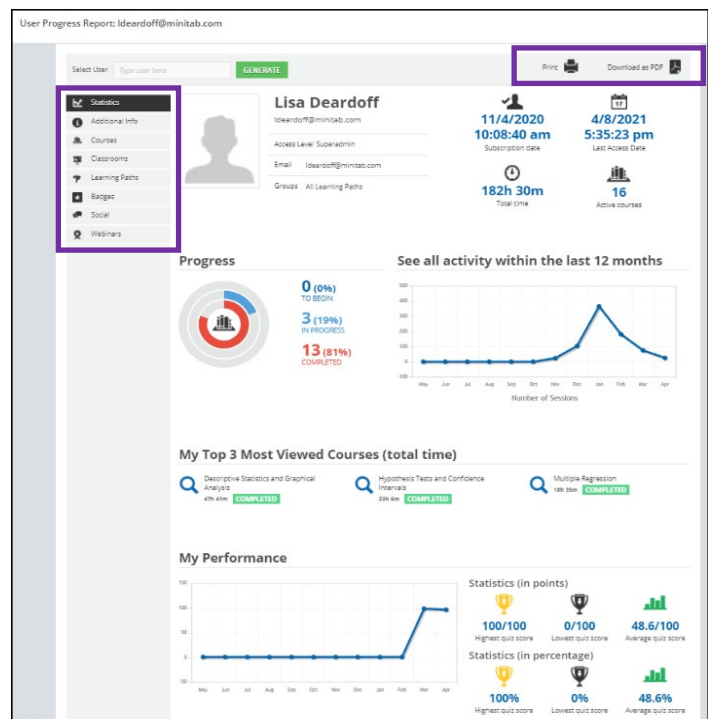
- To view a **Course Summary Report**, enter a course name into the search field and click **Generate**.

  - Run this report to see how many users are enrolled in this course, a summary of user progress, and user specific course details.

  - This report can be printed or downloaded as a PDF.
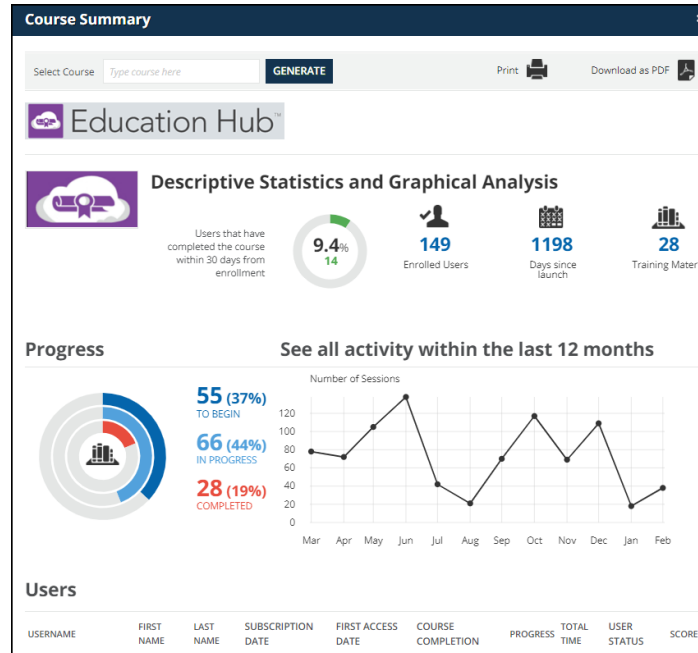


- Select the **Branch Progress Reports** tab to export various reports that contain data for *all users* in your branch.

  - Click on any of the reports to view a preview containing the first 100 rows of data.

  - Select the export icon in the upper right corner to export the data as a CSV or XLS.

  - Any report can also be exported directly from the report list by selecting the ellipses at the end of the row and clicking on **Export as CSV** or **Export as XLS**.