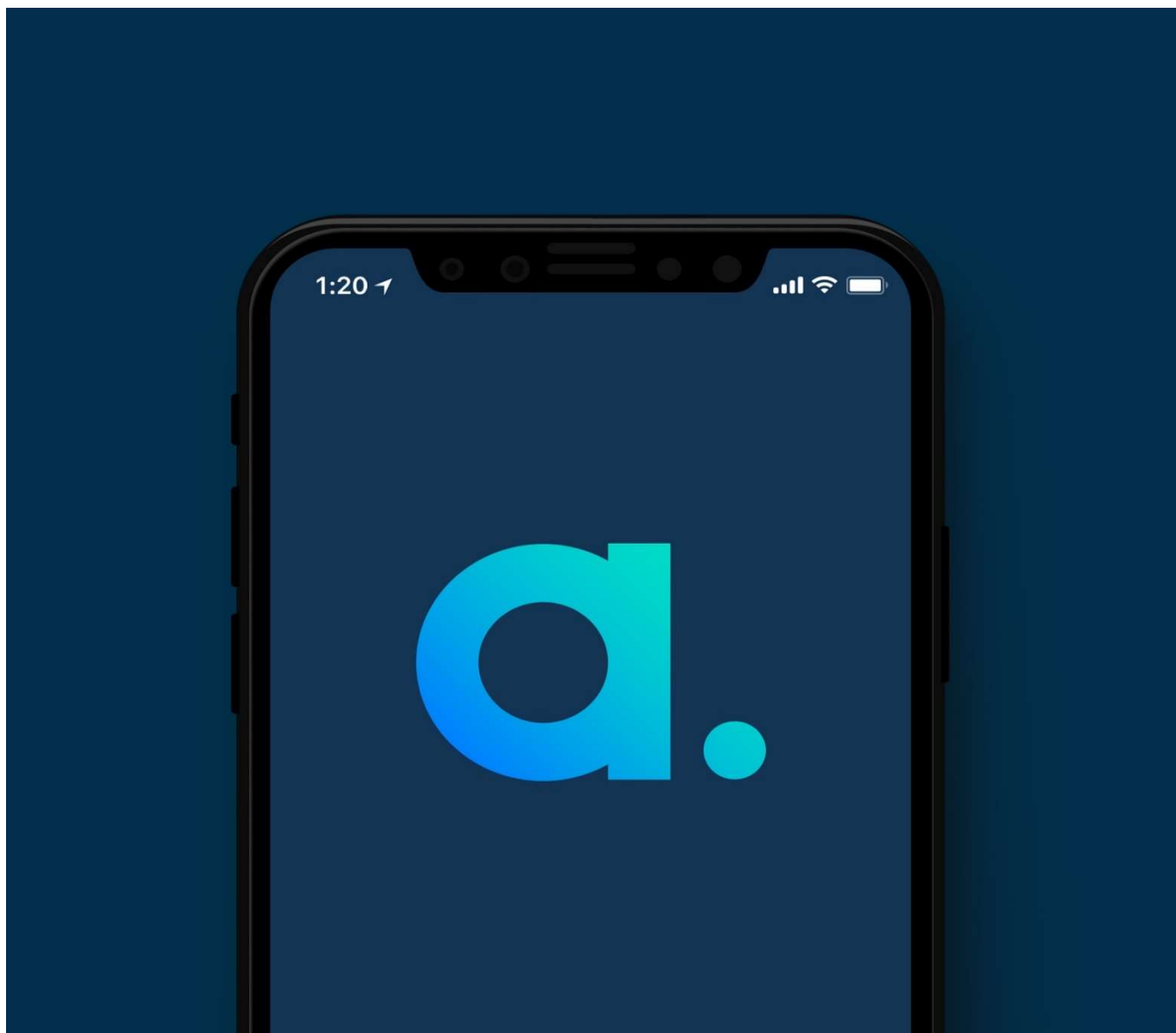




# A How-To-Guide to Creating a Learner Account

Version 1.1



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# Introduction

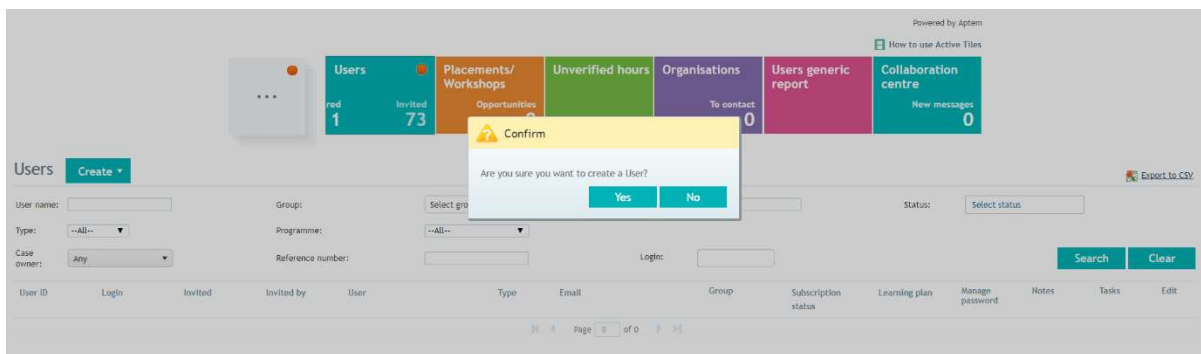
This guide explains how to create an Aptem account for a single learner as well as a batch of learners.

# Creating an account for an individual learner

1. Sign into your administrator account.
2. In the navigation panel, click on the 'users' tile, if not on this page already.



3. On the next page, click on the 'create' button. Within the drop-down list, select 'user' and review the confirmation pop-up message.



4. The 'add user page' will be displayed.
  - Select if you would like to invite the user into Aptem. 'Yes' means that the user will receive an email activation link to create their username and password. 'No' means that the user will have a status of 'prospect' in Aptem but is unable to log-in.
  - Enter the user's details. This includes the mandatory fields of first name, surname and email address.
  - Select the group to which the user should be allocated.
  - Select a programme. This could either be an application/eligibility programme or a delivery programme. If a programme is selected, then the user will automatically begin the onboarding wizard when they log into their Aptem account.
  - By default, the administrator creating the new user account will be assigned as the 'case owner' for that user. If you wish the user to be assigned to another person within your organisation, select their administrator account from the case owner dropdown list. If the administrator's name is not listed, you will need to create the administrator an Aptem account first.

- Click on the 'create' button. This will create the account and, if you selected that option, send an activation email to the user.

## Add user

Would you like to invite this user into Aptem?  Yes  No

User type (M) : User


First name (M) :

Surname (M) :

Gender (M) :  Male  Female

Email (M) :


Mobile :

Date of birth (D) :  

Group (M) : Expand all Collapse all

London Metropolitan College (4)

Apply program :  ▼

Postcode :  

Address 1 :

Address 2 :

Town/City :

County :

Country :

Case owner :  ▼

Learning provider :  ▼

Employer :  +

Employer address :  ▼

Manager :  ▼

Mentor :  ▼

Reference number :

Win rate of pay :  ▼

If you selected that you would like to invite the learner into Aptem when you created their account, the learner will receive the activation email.

The subject line of the email will be “Aptem account activation”. This email contains a link that confirms the user’s email address. Clicking on the activation link will display the activate account page. Here, the user must provide a password for their account. They can also change their login name.

If you said ‘no’ to inviting the learner to Aptem, you can locate the learner’s profile/record by clicking on the ‘users’ tile and searching for that learner. Once you have gone to their profile page, you will be able to send them the Aptem invitation.

Click here to send the Aptem Invitation to your learner

User profile Amanda Durnalls (0001; Disney)

[✉ send message](#)
[🗨 communication report](#)
[✉ send invitation](#)
[📄 edit users details](#)

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Employer	Disney
User email address	durnalls3@hotmail.com
Phone number	07809257674
Postal address	15 Woodfield Lane Woodsfield Redditch Worcestershire b98 7YT
Date of birth	
Group membership of user	Demonstration group
Signature (no mandate)	

[create](#)  
[prepare mandate](#)  
[upload signed mandate](#)

All your learners can be found in your ‘users’ tile. This includes prospects. You can do this by filtering:

User	Type	Email	Group	Subscription status	Learning plan
Nick Hodder	Admin	nickh@mwstechnology.com	Demonstration group	FullUser ❌	
Hugh Hebborn	User	Hugh.Hebborn@gmail.com	M.I.T Skill Demo Group	Invited ❌	Learning plan
Cher Dampy	Employer	DampCher@hotmail.com	Demonstration group	Prospect ❌	
Sally ULN	User	vikimws+sally@gmail.com	Viki Demo Group	FullUser ❌	Learning plan
Natasha UlN	User	vikimws+nat@gmail.com	Viki Demo Group	FullUser ❌	Learning plan
Viki ULN	User	vikimws+uln@gmail.com	Viki Demo Group	FullUser ❌	Learning plan
Steve Tutor	Admin	stevejobfinder+tut@gmail.com	BDM Demo Group.	FullUser ❌	
James Templeman	Admin	jamest@mwstechnology.com	Demonstration group	FullUser ❌	

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# Create an account for a batch of learners

This function allows you to invite a bulk list of users to activate an Aptem account.

1. Sign into your administrator account.
2. In the navigation panel click on the 'users overview' tile to display the users group profile page.

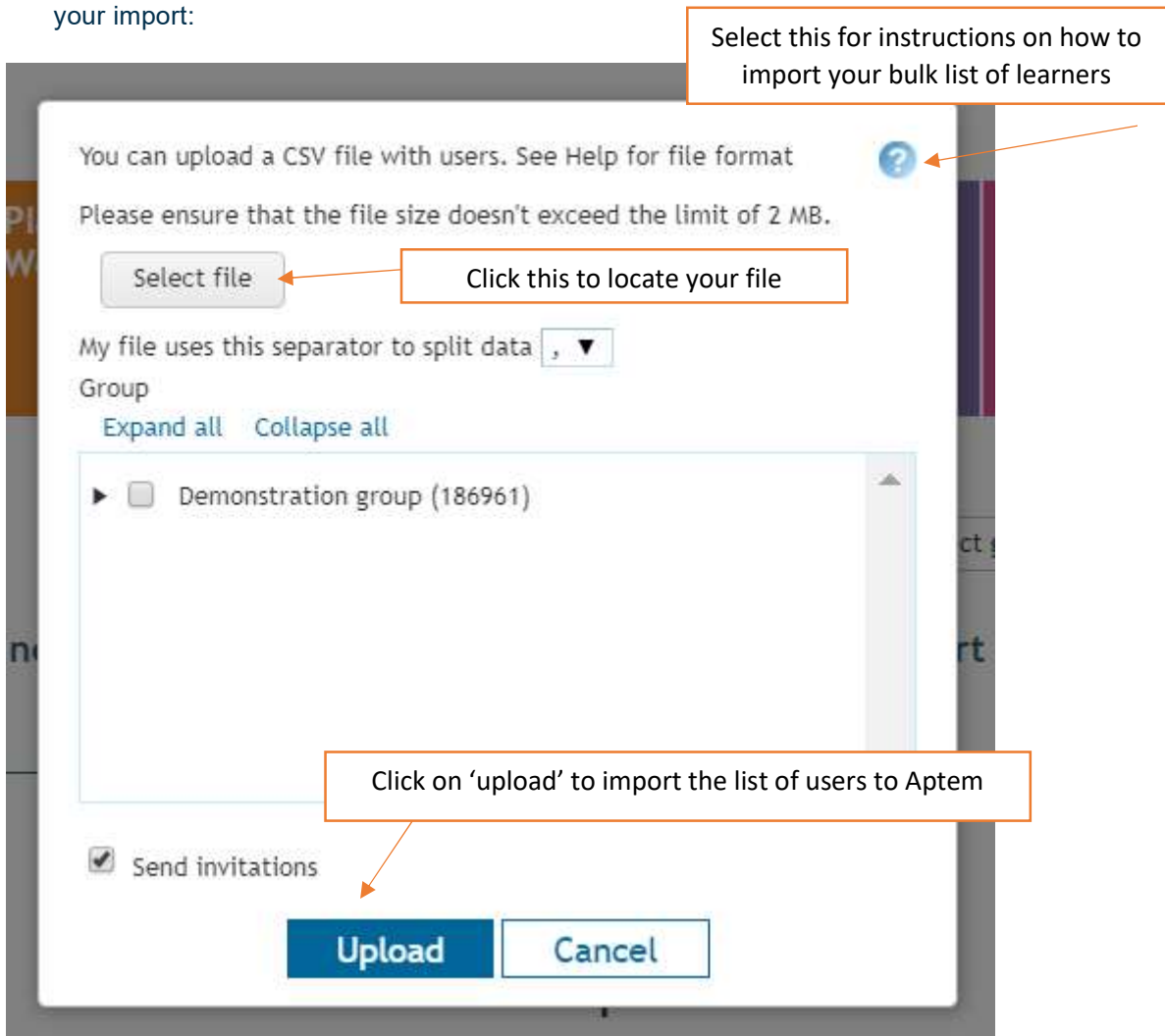
Users Group Profile Select groups

▼ Overview  new user  upload users  account activation report  users report  groups report  reassign on group

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Number of active users	115	send group message
Number of users invited	73	add task to users
Number of expired users	1	
Number of users 'got a job'	110	got a job report

3. Select the 'upload users' tab.
4. The upload window will be displayed. A question mark on the right-hand side has the full list of all fields. To create a bulk upload file of your learners, you should read the notes here and follow the steps for your import:

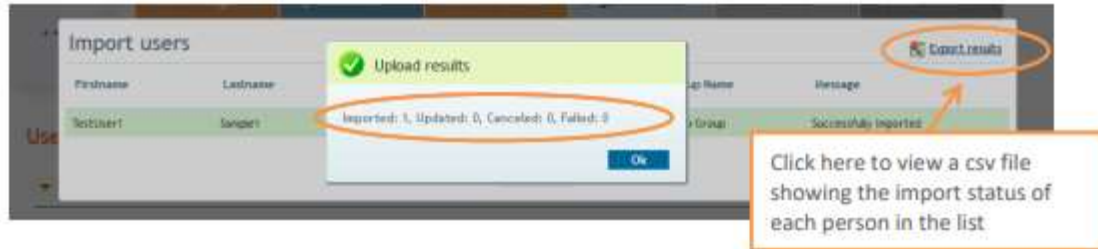




5. Using Microsoft Excel (or similar software) create a list of the users' details based on the columns in the '?', mandatory fields are listed below:
  - First name
  - Last name
  - Email
  - Reference number
  - Group
  - Programme
6. Enter the details using one row per person. Check that there are no spaces in the email addresses.
7. Save the file using csv file type shown as "csv (comma delimited) (\*.csv)" in Microsoft Excel's save as list.
8. Return to your Aptem page. Click on the select file button and browse to the saved list of users (csv file) on your computer. If the group column is empty for any of the users, they will be added to the group shown on the screen. You can change this by using the dropdown list. If you do not want email invitations to be sent automatically to the new users, untick the 'send invitations' box. Next, click on the 'upload' button.
9. The information in the csv file will be processed and displayed onscreen. This is for you to check before proceeding with creating accounts for each individual in the list.



10. Click on 'Import' to confirm that you wish to create Aptem accounts for each person in the list.
11. A confirmation message will be displayed stating how many people were imported. An account will be created for each person on the list with a valid entry. If the 'send invitations' box was ticked, each person will receive an activation email. The individual will need to click the in the email and create a password for their account.



12. Click on 'OK' to finish. You have the option to view a confirmation report of people uploaded to your account. Click on the 'Export results' link to open a file showing the status of the upload. You can check if there were any errors which prevented an invitation being sent. This might take place, for example, if you miss a name or an email address or use an invalid email address. This also might occur if an email address in the list had previously been used to create an Aptem account.