Epicor Learning Center Groups User Accounts and Groups

As the System Administrator, you organize and setup users in the Epicor Learning Center and assign permissions based on your company's requirements.

This course includes:

Implementation Planning

Managing User Accounts and Permissions

Catalog Restrictions, and

Organizing Users into Groups

The first step is to compile a complete list of your employees along with the information you'll need to create their accounts.

Putting this information into a spreadsheet helps ensure that you do not miss anyone.

We supplied one for you to use in the Course Materials for this Training on Demand class.

We also included documentation on creating a CSV file to import multiple Users.

You must have employees First and Last Name, Work Phone number, and Email address.

If you don't provide email addresses for your employees, then we recommend that you set up a generic store address that you can add to everyone's User profile.

Your employees don't need to actually access the email inbox.

You will just use it to track learning activity for any employee that has the address as part of their profile.

You must complete these areas when creating new user accounts: the Functional Area, iSupport with Account Access, and Time Zone fields.

Fields with an asterisk "*" are required information.

The last decision is to identify each user's capabilities, or Permissions, within the system.

You have several Permission types available in the Epicor Learning Center.

These include the System Administrator, Learning Administrator, and a Standard Learner.

The System Administrator role is unlimited and gives any person with this role full access to all user information. Be sure to assign this role carefully and accordingly.

We recommend that you have at least two System Administrators, so if one is unavailable, you have an alternate.

Account users have access to your online Epicor account information. Typically, you reserve this for the person paying your Epicor Account bill.

Learning Administrators create and edit assignments for other users, but cannot add or change user information. You can have an unlimited number of Learning Administrators.

The Standard Learner is the category assigned automatically when you add a user. Their login allows them to see their assignments, work through lessons and tests, and see their transcripts. You can have an unlimited number of Standard Learners.

If you have questions on these User Type definitions, click the Definitions of Permissions link on the Assign Permissions page in User Maintenance.

Now that you've assembled your user list, login to the Epicor Learning Center at ondemand.epicor.com to begin creating user accounts.

From your Home Page, click Admin.

From the navigation panel, select User Maintenance, and then Add User.

Fill out the form with the information from your User spreadsheet.

Select one of the Functional Area designations.

Choose All for Administrators or anyone you want to have access to all messages.

If you are not going to use the Message Center to post messages to specific groups of employees, select General / No Specific Area for everyone.

Select the No option for iSupport with Account Access for everyone except the person who pays your Epicor statement.

Select the correct Time Zone and click Submit.

The Epicor Learning Center displays a message that shows you added a new user.

The system sends an email notification to each employee with their username and computer generated password.

They will use this for their initial login to the Epicor Learning Center.

Once they log in, they can select Change Password under My Profile to reset it to one that they can easily remember.

If you’re using one generic email for all employees, you need to check the incoming emails so that you can share the Username and Passwords with your new Users.

Occasionally you may need to update employee’s profiles.

You can easily make these changes from User Maintenance.

Select Edit User, and then locate the employees name in the Contact drop-down list.

Click Submit.

The employees form displays and you can make any changes necessary.

Click Submit to save the changes.

You can also use this screen when they forget their password.

Notice the hyperlink on the bottom of the screen.

Click this and follow the prompts to reset the password.

You might find it necessary to Delete a User record.

Before deleting them, please review your record retention policy with your management.

When you delete a User, you also delete their training history.

If you need to retain this history for legal or reporting purposes, then you could simply change the User Password and Email Address to lock the employee out rather than deleting their account.

To remove a User, click Delete User.

Locate the User you are removing and press Submit.

Confirm the deletion by selecting Yes.

You can also permanently remove Users from the Assign Permissions page.

When assigning Users other than Standard Permission, you need to click Assign Permissions.

The Learning Center displays a list of all Users in alphabetical order by last name.

To change the User permission, simply enable the appropriate box or boxes for each person.

Click Submit to save the changes.

Groups allow you to organize your employees who share similar positions or roles.

Grouping employees in the Learning Center allows you to manage training effectively, since members of a Group typically need similar Assignments or Agendas.

Using Groups streamlines assignment processes in that you make an assignment once for a group that includes multiple employees instead of making individual assignments and risk missing someone.

Use the spreadsheet that you created for your User Accounts when you are creating Groups.

Review the employees in the list and determine the best method to sort them.

Sorting is typically by job or role, such as cashiers, Inventory clerks, and so on.

If you are multi-store, we recommend that you include the Store number in each group.

From the Admin page, select Manage Groups.

Select Add New Group.

Type the first Group Name from your list, and then click Submit.

Note the cursor drops down to Edit after you click Submit. If you are adding more groups, click Add again before entering your next one.

To edit the Group Name, simply click the Edit Name link from the Edit menu.

Type the changes you’d like to make to the Group Name and click Submit.

The Learning Center displays a message indicating that the change was successful.

Use the Delete Group link to remove a Group.

You must first remove all of the Group members before you can delete the group.

If you try to delete a group with members, the system displays a warning that you cannot perform that function.

The next step is to assign employees to the group that you created.

There are 2 ways to accomplish this task.

You can add one employee at a time using the Assign option here, or you can assign several at once using Edit.

You can add an employee to as many Groups as needed.

If adding a new employee to a Group - use the Assign option.

Select the Employee from the dropdown list.

In the Group section, select one or more Groups to which this employee belongs.

Remember, you can hold down the Ctrl key on the keyboard to select multiple Groups.

Then click Submit.

To update members of a Group using the Edit method, go to the Manage Groups menu and click Edit.

Select the Edit Members link.

To add someone new in the group, click on the Employee name and press the Add button.

To select more than one name at a time, hold the Ctrl button down on the keyboard while you select the names.

To take someone out of the group, click on their name and then choose Remove.

After all of the changes are complete, click Submit.

Once again, a message lets you know that your changes were successful.

To remove all members at once, highlight the first Employee in the Group, then press the Shift key on your keyboard and select the last Employee in the group.

This will highlight all members. Now press Remove and then Submit.

Now you can delete this Group.

From the list of Groups, you can click Delete Group, and then confirm by selecting Yes.

The Epicor Learning Center offers an easy to use system to manage employee coursework.

Take the time to create a list of Users and their related Groups to guide your staff through the classes they need.

This tool combined with short, easy to follow videos and accessible documentation, creates a dynamic learning environment for your business.

About Epicor

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