


Branch Administrator Guide

Logging in

Please use admin login credentials

Username

Password
 

SIGN IN

To begin, login to your portal (i.e., <https://branch.xatraining.com>) with the administrative credentials we provided. Please note Username and password are case sensitive. Upon initial login, you will immediately be prompted to create a new password. If you have forgotten your username and/or password, please call us at 847-266-7602 or email techsupport@xanalytics.com and we'll send it to you.

Navigating the Menu




To access **Certificates**, click on Certificates icon, and navigate to Users tab:

Certificates

TEMPLATES

USERS

IMAGES

At the bottom of the page, you can find a filter window and locate the user by first or last name. View the certificate by clicking on Preview icon . You can also download the PDF file for your records.

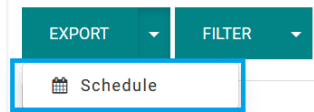


To access **Reports**, click on Reports icon.

Reports

EXPORT

Export button allows you to download **general report** that includes information about Users, Training progress, Courses, System log, and much more. Report is in .xlsx format, which allows you to filter and sort data.




If you would like the report to be sent to you on a daily/weekly/monthly basis, you can **schedule** it by clicking on drop down arrow next to Export and select date, frequency, and recipients.



To check user's training progress, click on **Timeline** tab and select desired dates and click on filter to locate the user.



To get access to prior training records and check the progress, click on **Users** tab, find the Filter at the bottom, and locate the user. Click on the name, and you will see all prior and current training with its status. You can also download the **certificate** by clicking on the ribbon icon .

If you have any questions, please call us at (847)266-7602 or techsupport@xanalytics.com