OPTIMUM ACADEMY

Manager Access

Step-by-Step Instruction Manual

A practical navigation guide for carrier and team managers using Reach 360

What this manual covers

This guide walks managers through the core tasks they are expected to complete in Reach 360: navigating the platform, managing assigned groups, inviting learners, assigning training, reviewing progress, and pulling reports.

Menu labels can vary slightly depending on your account setup or future platform updates, but the workflow and permission logic remain the same.

Quick Start at a Glance

If you need to...	Go here	What you can do
See who is in your assigned group	Manage > People > Groups	View membership and learner details
Add or invite learners	Manage > People > Users	Invite learners into the group you manage
Assign courses or learning paths	Manage > Learning Paths	Assign training to your group
Check completion and scores	Analyze	Review progress and quiz results
Download proof of completion	Analyze > Learners > Choose Learner & Lesson > Download Certificate	Locate completion evidence where available

1. Understand What Access You Have

Managers in Reach 360 have scoped access. That means they can manage learning activity for their assigned groups, but they do not control the entire platform.

As a manager, you typically can:

- Invite learners to your assigned group or groups
- Remove learners from the groups you manage
- Assign courses and learning paths
- View group-level reports for completion, progress, and quiz data
- Take training yourself as a learner if content is assigned to you

As a manager, you typically cannot:

- See other carriers or departments outside your assigned scope
- Edit platform-wide settings, branding, or account configuration

- Upload or edit course content unless you separately hold an Articulate authoring license
- View enterprise-wide reporting across the entire Reach environment

2. Log In and Open the Correct Area

Step 1: Sign in to Articulate 360 - Use your company credentials or invited account access.

Step 2: Open Reach 360 - From the Articulate environment, select Reach 360.

Step 3: Confirm you are in the manager area - You should see options Learn, Analyze & Manage.

Navigation tip
If you land on the broader Articulate dashboard first, do not worry. That page is the platform entry point. Select Reach 360 to move into the learning management side of the system.

3. Get Oriented on the Home Screen

When you first enter Reach 360 as a manager, scan the interface in this order:

Step 1: Assigned groups - the teams or learner segments you are responsible for

Step 2: Training content - the courses or learning paths available to assign

Step 3: Reports - dashboards or report views showing completion and status

Step 4: People or group member lists - where you can add, review, or remove learners

Start by identifying the specific group names you manage. This matters because your reporting, assignments, and learner actions are usually limited to those groups only.

4. Review Your Assigned Groups

Step 1: Open the Groups or People area - This is where Reach lists the groups available within your permitted scope.

Step 2: Select one group - Click the group name to open its member list and related actions.

Step 3: Review membership - Confirm the learners in the group are the ones you are meant to support.

When reviewing a group, pay attention to:

- Total number of members
- Whether the group name matches the business unit you support
- Whether any learners are missing or belong in a different segment

5. Add Learners to Your Group

Step 1: Navigate to "Manage" - Make sure you are inside the correct group before taking action.

Step 2: Select the "People" tab

Step 3: Select "Users" Tab

Step 4: Click “Add Users"

Step 5: Enter the learner’s email address

Step 6: Ensure “Add all learners to your group” is selected

Step 7: Send the invite

The learner will receive an email prompting them to access the platform.

Best Practice
For the most accurate reporting and streamlined onboarding:
• Ensure learners are added to the correct group at the time of access
• Follow your organization’s established process for requesting or adding new users

6. Remove Learners When Needed

Step 1: Open the correct group - Always confirm you are removing the learner from the intended group.

Step 2: Find the learner in the member list - Use search or sort if the group is large.

Step 3: Choose the remove action - This typically removes the learner from that group rather than changing platform-wide settings.

Step 4: Confirm the change - Double-check before proceeding, especially if the learner still needs historical reporting access.

Removing someone from a group does not necessarily erase historical learning activity from reports. Coordinate with your internal admin if a records retention decision is needed.

7. Assign Courses or Learning Paths

Step 1: Open the Learning Paths tab - Look for the learning path you want to launch.

Step 2: Select the content – Select the learning path you would like to assign

Step 3: Navigate to group/learners tab - Select the specific carrier, department, or team group you manage.

Step 4: Set the assignment – select enroll group or learners if you want specific people

Step 5: Confirm distribution - Verify the training is now visible to the right learners.

Before you assign training, confirm:

- The content is intended for that audience
- The group name is correct
- You are not duplicating an assignment that is already active

8. Track Learner Progress

Step 1: Open Analyze - Managers can view reports for their assigned groups.

Step 2: Choose the relevant group - Filter to the population you manage.

Step 3: Select Learners - This narrows the report to the exact training you want to review.

Step 4: Review progress indicators - Common fields include started, in progress, completed, and quiz performance.

Step 5: Interpret the data - Use the report to identify completion gaps, support needs, or follow-up actions.

Managers commonly monitor:

- Completion status
- Quiz scores or result details

- Learning path progress
- Participation by group or audience segment

9. Export Reports and Completion Evidence

Step 1: Open the relevant report view - Use the same filters you used to analyze progress.

Step 2: Apply group and training filters - Only export what is needed for the business purpose.

Step 3: Use the export option - Download the report for internal review, compliance tracking, or stakeholder updates.

Step 4: Locate certificates when available - For completed learners, certificates are accessible

For executive or compliance reporting, keep exports aligned to one clear audience at a time. This reduces confusion and preserves data integrity.

10. Troubleshooting and Escalation

If something does not look right, use this triage sequence:

Step 1: Confirm you are in Reach 360

Step 2: Verify you opened the correct group

Step 3: Check whether the learner is assigned to the expected group

Step 4: Confirm whether your role is manager-only

Step 5: Escalate to your Reach admin for platform-level changes outside your permission scope

Escalate to an admin when
A learner needs access outside your assigned group, a new group must be created, enterprise reporting is needed, or platform configuration must change.

Manager Success Checklist

Checklist Item	Status
I know which group or groups I manage	☐
I can invite or add learners to the correct group	☐
I can assign the right training to the right audience	☐
I know where to check completion and quiz data	☐
I know when an issue should be escalated to an admin	☐

Prepared for Optimum Academy manager onboarding. This guide is intended as a practical reference and can be tailored further to your exact Reach 360 configuration.