SHORT HOW-TO LIST FOR INSERVICE SOLUTIONS

1. **Create an account** for an new employee:
    a. Log in to InService Solutions
    b. Click on **Dashboard** in the menu near the top right of screen
    c. Go down to Manager Links and click on **Persons**
    d. Under Display Options, click on **Create Person** button
    e. Enter all the information for the new person
        i. Email address
        ii. Password
        iii. First name
        iv. Last name
        v. Organization (or site location)
        vi. Department
        vii. Supervisor
        viii. Title – the new person's job title.
        ix. Click on the **Create Person** Button

2. **Give an employee Subscriber Manager privileges**. This will allow them to view and make changes to user accounts and to run reports.
    a. Log in to InService Solutions
    b. Click on **Dashboard** in the menu near the top right of screen
    c. Go down to Manager Links and click on **Persons**
    d. Under Display Options, type their last name into **Name Search**
    e. Click on the blue **Search** button.
    f. Below you will see the list of persons with that last name. Select the person you want by clicking on the little **yellow pencil.**
    g. Put a checkmark in the little box after the words **Subscriber Manager** by clicking on the box.
    h. Be sure and save by clicking on **Save Changes**.

3. **Disable an Account**. When a person terminates employment, you "Disable" their account by doing the following:
    a. Log in to InService Solutions
    b. Click on **Dashboard** in the menu near the top right of screen
    c. Go down to Manager Links and click on **Persons**
    d. Under Display Options, type their last name into **Name Search**
    e. Click on the blue **Search** button.
    f. Below you will see the list of persons with that last name. Select the person you want by clicking on the little **yellow pencil.**
    g. You can now disable that person's account by clicking on the little box after the word **Disabled**.
    h. Now click on the **Save Changes** button.
    i. **NEVER** click on the *Delete Person* button. That will delete their account. That information must stay in the system in case you have to run a report on a prior year.

4. **Edit an employee's account -** such as change last name, supervisor name, title, etc.
    a. Log in to InService Solutions
    b. Click on **Dashboard** in the menu near the top right of screen
    c. Go down to Manager Links and click on **Persons**
    d. Under Display Options, type their last name into **Name Search**
    e. Click on the blue **Search** button.
    f. Below you will see the list of persons with that last name. Select the person you want by clicking on the little **yellow pencil.**
    g. Here you can change any information about the person.
    h. Be sure and save by clicking on **Save Changes**.

5. **Run a Compliance Report- to show who has completed and who has not**
    a. Log in to InService Solutions
    b. Click on **Dashboard** in the menu near the top right of screen
    c. Go down to Auxiliary Reports and click on **Compliance Report**
    d. Enter the InService period from the Drop-down box
    e. Enter the dates you want the report to be for.
    f. Click on the Display Options and Display Fields choices.
    g. Click on the **Search** button. You will see the information displayed at the bottom of the screen.
    h. When the report displays the way you want it, you can click on **export to Excel** to give you the info in an Excel document; or you can click on **Print** to print it out.
    i. To scroll across in the boxes on the screen use the right arrow keys.

6. **Run a Grade Report –** to show who has and hasn't completed the modules, as well as the grades they received on each module.
    a. Log in to InService Solutions
    b. Click on **Dashboard** in the menu near the top right of screen
    c. Go down to Main Reports and click on **Grade Report**
    d. Enter the InService period from the Drop-down box
    e. Click on the Display Options and Display Fields choices.
    f. Click on the **Search** button. You will see the information displayed at the bottom of the screen.
    g. When the report displays the way you want it, you can click on **export to Excel** to give you the info in an Excel document; or you can click on **Print** to print it out.
    h. To scroll across in the boxes on the screen use the right arrow keys.
    i. You can click on any of the headings to sort the information. For example, click on "Completed" heading to sort either all the NOs or YESs first.