Add New User

1. **Click the Users tab.**
2. **Click on the location you'd like to add to.**
3. **Click 'Add User'.**
4. **Complete the required fields, First Name, Last Name, Country, State, and email address.**
   - The email address is for receiving email invitations and/or notifications. Not used for login.
5. **Click 'Create Account' to save.**

Send Email Invitation

1. **Click the Users tab.**
2. **Click on the location the user belongs to.**
3. **Go to User name.**
4. **Click the green 'Email Invitation' button to send instructions with a login link and access code.**
5. **Email from 'Bistrainer''. If not in your inbox double-check the email was correctly entered into the LMS or check your spam folder or with the IT department if blocked.**
   - How the user activates the account: click on the login link, click on Enter Code to enter the access code, click 'I am not a Robot', create a password (field on the right), accept the terms and conditions, receive a pop-up with system generated username.

Merge Duplicate Accounts

1. **Click the Users tab.**
2. **Click on location.**
3. **Click on the User name to view the Profile.**
4. **Click 'Merge Account'.**
5. **Type their name.**
6. **Select the account being merged.**
7. **Click 'Submit'.**
8. **Click 'Merge'.**
9. **Select 'Yes' to keep the user role.**
10. **Click 'Proceed' to save.**
    - **Note:** Name spelled the same or the first three letters match. Any changes go to the user profile. To merge a deactivated account call the **MSI Helpline** at **866-661-5120**.

Edit User/Water Wastewater License
1. Click the Users tab.
2. Populate users in the location.
3. Click on the name to view the profile.
4. Add their WW License # in the corresponding field, and if applicable any other information.
5. Click Save to keep changes.

Move User to Sub-Location
1. Click the Users tab.
2. Populates users in the location.
3. Click on the User name to view the profile.
4. Click on 'Move'.
5. Type the (your) town/agency name in the 'Destination Location' dropdown and select sub-location.
6. Click 'Move'.
7. Select 'Yes' to the warning message.
8. Users moved.

Move Multiple Users to Sub-Location
1. Click the Users tab.
2. Populate users in the location.
3. Click the check box on the right to select Users(s).
4. Click 'Move Users' under Bulk Actions.
5. Type the (your) town/agency name in the 'Destination Location' dropdown and select sub-location.
6. Click 'Move'.
7. Select 'Yes' to the warning message.
8. User moved.

What is the Difference between MSI LIVE and MSI NOW Group Sign-in Sheets?

MSI LIVE Group Sign-in Sheet (Zoom Classes Only) can only be submitted through Survey Monkey. We can no longer accept scanned and emailed sign-in sheets because we are utilizing new computer programs to improve recording training history in the LMS. If you email a MSI LIVE group sign-in sheet it will be returned and you will need to submit it through Survey Monkey.

MSI NOW Group Sign-in Sheets (On-demand Classes in the MSI LMS), you are responsible for recording the learning in the MSI LMS. Please follow the step-by-step instructions to record each class. If you email an MSI NOW group sign-in sheet it will be returned and you will provided the instructions to complete.

Please do not enter MSI LIVE Group Sign-in Sheets into the LMS or submit MSI NOW Group Sign-in Sheets through Survey Monkey.

MSI NOW: Assign On Demand Course to a User
1. Click the Users tab.
2. Populates users for the location.
3. Click on the name to view the profile.
4. Click 'Add Courses and Forms' at the bottom.
5. Select the online course from the drop-down menu.
6. Click the '+' green button to add additional course(s).
7. Click 'Submit' to save changes.

MSI NOW: Assign OnDemand Courses to Multiple Users
1. Click the Users tab.
2. Populates users in the location.
3. Click the check box on the right and select Users.
4. Click 'More…' on the top right under Bulk Actions.
5. Click 'Add Course' under Bulk Actions.
6. Select the online course from the 'Courses and Forms' drop-down menu.
7. Click the '+' button for additional course(s).
8. Click 'Submit' to save changes.

MSI NOW: Add Training Record for On-Demand Courses to Multiple Users
1. Click the Users tab.
2. Populate users in the location.
3. Click the check box on the right and select users.
4. Click 'Add Training Record' on the top right under Bulk Actions.
5. Enter 'Course ID' as provided in the MSI NOW Recording Group Training Instructions.
6. Click 'Submit' to save changes.
   - **Note:** Group Sign-in Sheets for MSI LIVE Virtual Classes are submitted via Survey Monkey. Only fill out the required information and leave any question without an asterisk (*) blank as the system will automatically enter the proper information.
   - **Note:** Non-MSI Training Event documentation should be emailed to MSI@jamontgomery.com.

Printing Certificates
1. Click the Users tab.
2. Populate users in the location.
3. Click on the name to view the user profile.
4. Click the 'User Home Page' at the bottom
5. Go to the 'Completed' section.
6. Click on the gold certificate symbol.
7. Go to downloads to view the Certificate.
8. Save or Print

Printing History Report

1. Click the Reporting tab.
2. Go to the 'Completed Training by User' widget.
3. Select the location from the drop-down field.
4. Click 'Completion Report' in the top right corner.
5. Select a Start Date and End Date.
6. Click 'Submit'.
7. Go to downloads to open the Excel document.
8. Click Enable Editing.
9. Format, Sort, and Print documents as needed.
   - **Note:** Includes Certificate link.

MSI or MSI Training-Related Questions?

CALL: MSI Helpline 866-661-5120

EMAIL: MSI@jamontgomery.com

LMS Questions?

CALL: BIS Customer Support 866-416-1660

EMAIL: help@bistrainer.com

BIS Customer Support can help answer most of your questions on system functionality and assist you further with:

- Logging-in/System Access Codes
- Merging Accounts
- Move Users to an Existing Location
- Additional System Functionality Questions
  - **Note:** To add a new location or sub-location please call or email MSI.