

Initiate Tech Guide

Reference this guide for how to's of Initiate features.



- 1)** Table of Contents
- 2)** Running Initiate Reports
- 3)** Business Self Assessment Report
- 4)** Creating an Action Plan
- 5)** Adding & Deleting User Roles
- 6)** Using an Initiate Signup Link
- 7)** Role Permissions: Org. Admin
- 8)** Role Permissions: Advisor
- 9)** Role Permissions: Learner

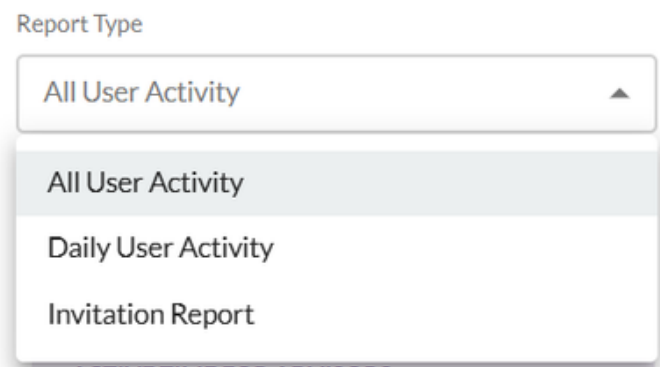
Running Initiate Reports

1) Go to the **Reports** tab



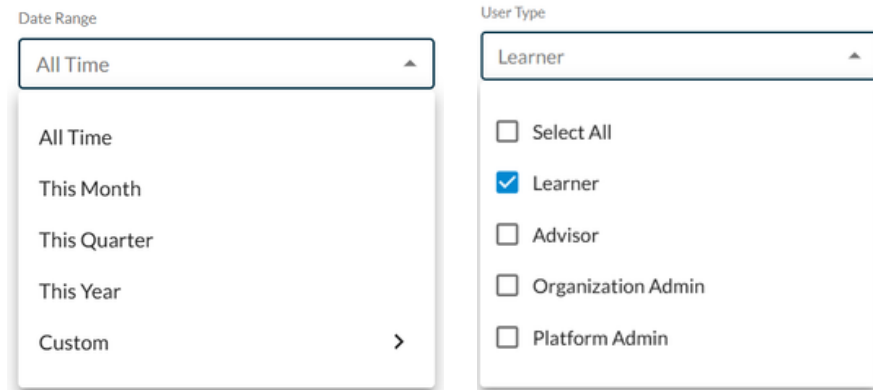
2) Choose the **Report type**.

- **All User Activity:** This report returns profile data like demographics, years in business, email, and other information found on a user's profile page as well as their all time utilization.
- **Daily User Activity:** This report provides a summary of each user's engagement with Initiate broken down by day such as; active hours, number of resources viewed, which resources they viewed, and number of action items completed.
- **Invitations Report:** This report shows recent invitations that have been sent and whether or not they have been redeemed to create an Initiate account.



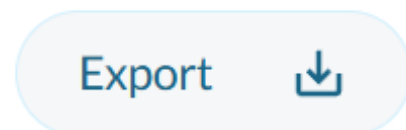
3) Choose the **Date Range** and **User Type**.

***NOTE:** User type may require cleanup in the excel export if you have advisors that ALSO have the "learner," role. This can be solved by deleting their learner role on the Manage User's page.



4) Click **Export**

The report will export to a CSV file that can be modified to analyze your Initiate data.



Business Self Assessment Report

For Advisors:

1) Go to the **Trends** tab

Discover

Activity

Reports

Trends

2) Click **Export CSV**

- The **Business Self Assessment CSV Report** will return a detailed excel file of all the responses and scores from each Business Self Assessment taken by your learners.

Export CSV



Export PDF



3) Click **Export PDF**

- The **Business Self Assessment PDF Report** will return a visual summary of the graphs on the Initiate Business Assessment Trends page.

Export CSV



Export PDF



For Org Admin:

1) Go to the **Trends** tab

Discover

Activity

Reports

Trends

2) Click **Business Assessment**

Utilization

Business Self Assessment

3) Click **Export CSV**

- The **Business Self Assessment CSV Report** will return a detailed excel file of all the responses and scores from each Business Self Assessment taken by users in your organization.

Export CSV



Export PDF



3) Click **Export PDF**

- The **Business Self Assessment PDF Report** will return a visual summary of the graphs on the Initiate Business Assessment Trends page.

Export CSV



Export PDF



Creating an Action Plan

1) From the Dashboard, scroll down to **Action Plans**

Action Plans

Manage Action Plans

2) Click **Manage Action Plans**.

Program 1
1 Resources

Financials
3 Resources

***NOTE:** You can also reach this page by clicking your name in the upper, right-hand corner then Manage Action Plans.

3) Click **New Action Plan**

New Action Plan

New Action Plan

Title
Pre-Loan Action Plan

Cancel

Create →

4) Add a title for the Action Plan, then click **Create**.

5) Once the Action Plan has been created, click the three dots to the right and **Add Resources**.

Pre-Loan Action Plan
0 Resources

Assign Action Plan

Add Resources
Delete

6) Click the box for each resource you would like to add to the Action Plan.

Add to Action Plan

Resources

Your Startup Checklist x startup

Your Startup Checklist

Calculating Your Startup Costs in the First Year

***NOTE:** You can type in a title or keyword to search for specific resources.

7) Click **Add** to finalize your Action Plan

Add to Action Plan

Resources

Your Startup Checklist x

Creating Your Business Plan | Tips & Template to Review x +2 x

Resources

Cancel

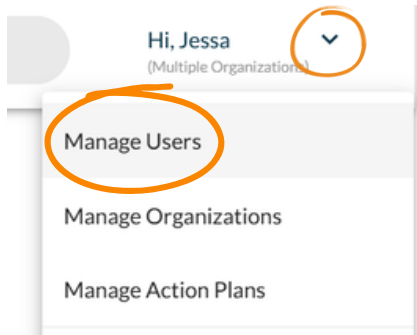
Add

***NOTE:** You can add and delete resources to your action plans at any time from the Manage Action Plans Page. Simply click the three dots to the right of each Action Plan title. You cannot change the title of an Action Plan, but could easily delete the Action Plan and recreate it with a new title.

Adding & Deleting User Roles

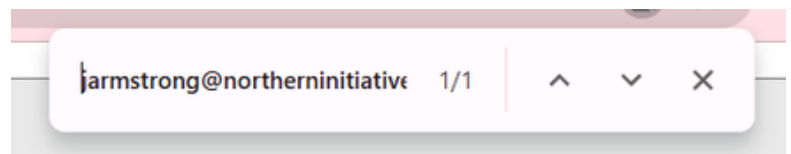
*NOTE Editing user roles is only available to Org Admin.

1) Go to the **Manage Users Page**.



2) Find the user you would like to edit.

The quickest way to do this is to use the **CTRL F** function on your keyboard, then type in the user's email.



3) Use the scroll bar at the bottom of the page to scroll to the right. Click the three dots and "edit."

jarmstrong@northerninitiatives.org

Google

Multiple Roles ⓘ

02/10/23

01/06/26

⋮

4) To **Delete a Role**, click the three dots to the right and then "Delete Role." If you are deleting an Advisor role, you will be prompted to reassign their learners to a new Advisor prior to deletion.

Demo Org

Learner

Ani Anderson

⋮
Delete Role

Roles

Organization	Role	Advisor	Actions
Northern Initiatives	Organization Admin	N/A	⋮

Add Role +

5) To **Add a Role**, click the yellow button below then choose your organization, the role and the advisor if applicable.

6) Click **Create Role**.

Role

Learner

Advisor

Ani Anderson

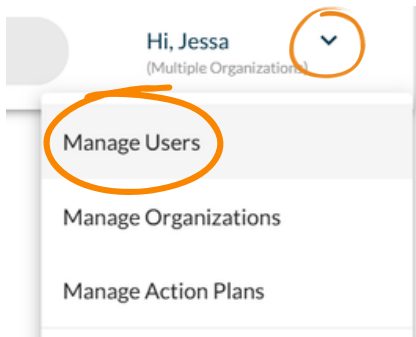
Cancel Create Role →

initiate

Using an Initiate Signup Link

***NOTE** The signup link is only available to Org Admin with a Premium Subscription.

1) Go to the **Manage Users Page**.



2) Click **Copy Signup Link**



3) Share the link on your organization's website for easy access to Initiate!

4) Learners will be prompted to create an account and choose an advisor from your organization after clicking the Signup Link.



Join Demo Org

Select your advisor to get started.

Organization

Demo Org

Advisor

- Ani Anderson
- Christine Rector
- Chris Wendel
- Matthew Shaw
- Natasha Koss

Logout →



Role Permissions: Org. Admin

The screenshot displays the 'Initiate' platform interface for an 'Org. Admin' role. At the top, navigation tabs for 'Discover', 'Activity', 'Reports', and 'Trends' are circled in orange. Below the navigation bar, the 'Active Learner Progress Last 30 Days' section features a donut chart showing 639h 30m of active time and a table of viewed resources. The 'Action Items' section shows a 94% completion rate (46/49) and a list of tasks. At the bottom, a user management table lists users like 'Ida Tate' and 'Ani Anderson', with a dropdown menu for 'Ani Anderson' showing 'Edit' and 'Reset Password' options, also circled in orange.

Navigation Tabs: Discover, Activity, Reports, Trends

Active Learner Progress Last 30 Days: 639h 30m Active Time

VIEWED RESOURCES:

CATEGORY	COMPLETED	VIEWED
Startup	183	926
Money	314	1243
Marketing	139	522
Management	200	911
Organization Content	6	63

Action Items: 94% (46/49) Completed/Total Action Items

- The True Costs of Marketplace Selling
Assigned by Ani Anderson
Due by 11/14/2025
- Tracking Sales and Reviewing ROI by Channel
Assigned by Ani Anderson
Due by 11/14/2025
- Where and How to Sell Your Products Online
Assigned by Ani Anderson
Due by 11/14/2025

User Management Summary:

- Business Self Assessments Completed: 1
- Custom Action Items Completed: 0
- Saved Calculators: 4
- Uploaded Documents: 0

User Management Table:

Name	Role	Email	Auth Method	Organization	Start Date	End Date	Actions
Ida Tate	Initiate	info@initiateprosperity.org	Name/Password	Organization Admin	07/05/23	05/12/26	...
Ani Anderson	Initiate Demo	advisor1@initiateprosperity.org	Name/Password	Advisor	07/06/23	05/12/26	Edit, Reset Password

- Tabs available: Discover, Activity, Reports, Trends (Business Assessment Trends & Organizational Trends)
- User Management: Ability to reset password & add or delete user roles
- Invitations: Can invite Advisors, Learners or other Org. Admin
- Action Plans: Able to create personalized action plans to assign to their learners, as well as action plans that are available for any advisor with their organization to utilize

Role Permissions: Advisor

Discover Activity Reports Trends

Find A Resource...

Hi, Ani Demo Org

Active Learner Progress Last 30 Days

View All Learner Activity

ACTIVE TIME

23h 45m Active Time

VIEWED RESOURCES

CATEGORY	COMPLETED	VIEWED
Startup	2	9
Money	0	55
Marketing	0	5
Management	2	62
Organization Content	0	2

Business Self Assessments Completed
16

Custom Action Items Completed
16

Saved Calculators
30

Uploaded Documents
25

Action Items

View All

61% 111/182 Completed/Total Action Items

- Business Owner's 3 Go-To Financial Reports
Assigned by Ani Anderson
- Understanding Your Balance Sheet
Assigned by Ani Anderson
- Business Owner's 3 Go-To Financial Reports
Assigned by Ida Tate
- Understanding Your Balance Sheet
Assigned by Ida Tate
- Business Owner's 3 Go-To Financial

Janet Smith	Cafe Janet	learner1@initiateprosperity.org	Name/Password	Learner	07/10/23	04/30/26	...
Ida Tate	Initiate	info@initiateprosperity.org	Name/Password	Multiple Roles	07/05/23	05/12/26	View Details Reset Password

- Tabs available: Discover, Activity Reports & Business Assessment Trends
- User Management: Ability to reset password and view user roles
- Invitations: Can only invite Learners
- Action Plans: Able to create personalized action plans they can assign to their learners

Role Permissions: Learner

Well Done on Completing the Business Self Assessment!
Explore your results to access helpful resources and uncover new opportunities for growth.
[View your results](#) →

Learning Progress Last 30 Days [View All Activity](#)

ACTIVE TIME

241h
Active Time

VIEWED RESOURCES

CATEGORY	COMPLETED	VIEWED
Startup	30	203
Money	60	544
Marketing	12	112
Management	19	278
Organization Content	2	41

Action Items [View All](#)

96% **110/114**
Completed/Total Action Items

- Strategies to Boost Your Sales**
Assigned by Ani Anderson
Due by 11/14/2025
- The True Costs of Marketplace Selling**
Assigned by Ani Anderson
Due by 11/14/2025
- Tracking Sales and Reviewing ROI by Channel**
Assigned by Ani Anderson
Due by 11/14/2025
- 2025 Tax Return**
Assigned by Ani Anderson
Due by 02/26/2026

- Tabs available: Discover & Activity
- User Management: Can view & edit their own profile information
- Invitations: Cannot invite any users