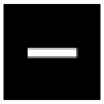
Administrator Guide

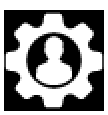
 Admin Page Overview

Hierarchy Tree Navigation: Navigating through the hierarchy tree for your organization is simple. Click the arrows to expand or minimize the hierarchy levels immediately below and click the name of the organization or group to select it – the selected group or individual will be highlighted in gray.

- To see both active and inactive users within the hierarchy, un-check the **Active Users Only** box.
- Once you have selected a hierarchy group from the tree, you can move through the admin tools and all changes you make will be applied to only that group.
- To minimize the hierarchy tree and expand your workable screen, click the **minimize** icon at the top of the navigation menu. To expand, click the icon again.

Tool Navigation: You can switch between admin tools by clicking the icons in the left-hand admin menu. To view a text description of the tool, simply hover your mouse over the icons and the extended menu will pop out.

In-Tool Navigation: Make sure that you have selected the desired hierarchy group, user(s), course(s), profile, etc. within the **Select** tab before moving on to the other tabs within the tool. All of the changes you make will be applied only to the selected items.

 Manage Users

The manage users tools allows the administrator to create, edit, manage and assign training to users within hierarchy groups.

To Register a New User:

1. Click on the **Manage Users** icon in the left-hand admin menu.
2. Navigate through your hierarchy tree to the group where you want to add the new user. Users can only be added to level one hierarchy groups.
3. On the right, click the Add User tab.
4. Required information is noted.
5. Click Save.
6. To send and receive a copy of a notification message, select the appropriate check boxes. Customize the message as needed.
7. Click Save to register the user. If Notify User is checked a registration notification will be sent.

To Register Multiple Users at Once:

1. Click on the **Manage Users** icon in the left-hand admin menu.
2. Navigate through your hierarchy tree to the group where you want to add the new users.
3. On the right, click the Upload Users tab.
4. Click the CSV button to download the upload template. Prepare file accordingly.
5. Upload the .csv file by clicking the Choose File button and selecting the appropriate file.

6. Errors will be displayed in red. Errors must be addressed in order for the upload to be successful. Common errors include missing required information and duplicate usernames. Usernames must be unique across the entire LMS, not just the upload document.
7. Uncheck the box for users that should not be included in the upload.
8. Check the box Email Registrant Notifications to send a notification to uploaded users.
9. Click Save. Users have now been registered.
10. Click the Copy, CSV or PDF buttons to download a list of registrant information.

To Edit a User:

1. Click on the **Manage Users** icon in the left-hand admin menu.
2. Navigate through your hierarchy tree to the group of the individual you want to edit. You can also select at a higher level. All active users within the hierarchy you select will be displayed to the right. To include inactive users, uncheck the box "Active Users Only".
3. From here you can immediately reactivate/deactivate a user by clicking the person icon listed under "status".
4. Click on an individual to edit information. To make active or inactive, click the active/inactive icon to the top right. To change or grant admin authority, be sure to set the Admin Group ID and Max Admin Level Authority. Click save to save your changes.

To Assign Courses:

To an Individual:

1. Click on the user's name and then click Assign Courses.
2. Choose the filter settings you need on the left.
3. You can determine default values for multiple courses by entering information into the fields just above the course list (Initial Due Date, Due Date Recurrence Period (Days, Course Availability Date) and then checking the training you want to assign.
4. Click Save to assign training.
5. In the window to Confirm Individual Enrollment, choose whether to notify the user and customize the enrollment message. Click Save to confirm enrollment and send a message if Notify User is checked.
6. You can easily run a report on an individual by clicking View Reports and choosing the report type and filter settings on the left. All reports can be exported to Excel, PDF.
7. To print a certificate, select the course(s) by checking the check boxes and click Print Certificate

To a Group:

1. Navigate down through the hierarchy tree to the hierarchy group you want to assign training to. If you have multiple departments at level 1 that need the same training, simply select the level 2 group above all the level departments to capture all users.
2. Using the check boxes, select or de-select all users using the check box in the green header next to User Name. Or simply select or de-select manually with the check boxes next to the individual users.
3. Click Assign Courses.
4. Choose the filter settings you need on the left.
5. You can determine default values for multiple courses by entering information into the fields just above the course list (Initial Due Date, Due date Recurrence Period (Days, Course Availability Date) and then checking the training you want to assign.
6. Click Save to assign training.

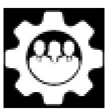
7. In the window to Confirm Group Enrollment, choose whether to notify the users and customize the enrollment message. Click Save to confirm enrollment and send a message if Notify User is checked.

To Merge Users:

1. Click on the user's name and then click Merge Users.
2. Enter the username you want to merge in the User to Merge field or click the button to the right of the field to search for usernames and select the username.
3. Click Save to merge the two usernames and connected records together.

To Transfer Users:

1. Navigate through your hierarchy tree to the group where the individuals you want to transfer reside
2. Using the check boxes, select or de-select all users using the check box in the green header next to User Name. Or simply select or de-select manually with the check boxes next to the individual users.
3. Click Transfer Users.
4. Click Reporting Group and navigate through the hierarchy tree to the level 1 group you want to transfer users to and double-click it.
5. Click Save to transfer users.



Manage Groups

The manage groups tools allows the administrator to edit the current hierarchy groups and to create departments or divisions. From this set of tools an administrator can also set the start and end date for a Points Campaign.

To Edit a current Group:

1. Click on the **Manage Groups** icon in the admin menu.
2. Navigate through your hierarchy tree to the group you want to edit.
3. You can edit the group name, contact information, and the group users' active status.
4. After making changes, click **Save** and wait for the green confirmation bar.

To Add a group:

1. Click on the **Manage Groups** icon in the admin menu.
2. Navigate to the "parent group" or the group above the group you would like to add. (**Note:** You cannot add a group below level 1).
3. Click **Add**.
4. Create a **Group Name**.
5. Click **Save** and wait for the green confirmation bar.

To Set up a Points Campaign:

The Points Campaign allows users to see how many points they have accumulated based on how many minutes of training they have finished. It also shows them their ranking among the group for the given points campaign. The points can be seen from the My Training page in the Achievements section.

1. Click on the Manage Groups icon in the admin menu.

2. Navigate to the group that you would like to set up the points campaign for. A Points Campaign can be set up at any level in your Organizational Hierarchy and will apply to anyone who falls within that downline.
3. Enter a date in the **Count Points Campaign Begin Date** as the date you want to start counting points and a date in the **Counts Points Campaign Expiration Date** as the date you want to stop counting points.
4. Click save and wait for the green confirmation bar.

Manage Profiles

Profiles allow you to target training to specific positions and duties. Once created, profiles can provide an automated approach to relevant course assignments, due dates, or recurrence periods automatically. Profiles are based on the hierarchy and can be copied at lower levels in the hierarchy tree with completely different training.

There are three types of profiles that can be created:

1. Courses assigned automatically to users upon registration.
2. Courses assigned based on a “yes” response to a specific question.
3. Courses assigned based on a drop-down box selection, usually a job function.

If your entity would like to automatically assign courses to users based on profiles, you must enable the entity’s/department’s ability to “push training” at registration. To turn on “push training” see Manage Groups.

Once profiles are created, administrators can assign profiles through the **Assign Training** tool in the **Manage Users** section of the site.

To Add a Profile or Bundle:

1. Click on the **Manage Profiles** icon in the admin menu.
2. Navigate through your hierarchy tree to the group who should have access to the profile. Click on the group name to select.
3. Under the **Select** tab, click on the **Add Profile** button. This will take you the **Edit** page to create your new profile or bundle.
4. Enter the name of the profile in the field. This will be the name your users will see if they have the option to select a profile. Only use alphanumeric characters in this field.
5. Select if this should be a **Profile** or a **Bundle**. A Profile is used to assign both the profile and the associated courses. A bundle assigns only the courses to the user.
6. By selecting **Lock Profile**, only your ID can make changes to the profile those users at your level of authority will not be able to edit they will only be able to copy.
7. **Auto Enrollment Configuration**, select how you would like users to receive this profile. You may choose only one setting in this section.
    a. **No Auto Enrollment**. This is for profiles that will not be auto-assigned. Rather they will be assigned to users by Administrators through the **Manage Users**/**Assign Courses** tool.
    b. **Auto-Enroll All Users.** Select this box if you would like all users to automatically receive this course.

c. **Auto-Enroll – question-based – users answering yes get assigned**. Select this box if you would like to have users answer "yes" to a question provided. Enter the question you would like the user to answer in the field provided.
d. **Auto-Enroll Assignment Based –dropdown list –users assigned when this profile is selected**. Select this box if you would like the profile to be added to the current dropdown list of job functions.

8. **Existing Courses Match Actions,** you can update due dates and recurrence periods for any existing authorized courses that match courses in the new profile.
    e. **Do nothing**. Leave matching authorization, due date and recurrence period as is. This selection will not change any existing courses.
    f. **Update authorization** end date, due date, and recurrence periods to match profile. This selection will change authorizations to match the profile. Warning: If a user has several profiles associated to their id and a course is repeated profiles, this function will override the due dates and recurrence period for the other profiles
9. **Existing Course No Match Actions**, you have the option to update course authorizations that do not match the profile.
    g. **Do nothing to the existing courses**, will add but not remove courses from the profile.
    h. **De-authorize**, you must contact the training center provider in order to access this functionality.
10. Once the profile or bundle information is completed, move to the Courses tab to select the courses you would like to add to the profile or bundle.
11. You have the option to add initial Due Dates and Recurrence Periods to the profile or bundle. Enter the number of days for each course.
    NOTE: The Due Dates and Recurrence Periods are an optional setting. If you do not have a specific time period for a course, leave the setting at "0".
12. Click **Save** and wait for the green confirmation bar.

To Edit or Copy a Profile or Bundle:

1. Click on the **Manage Profiles** icon in the admin menu.
2. Navigate through your hierarchy tree to the group who should have access to the profile. Click on the group name to select.
3. To edit or copy a profile or bundle: NOTE: Refer to the instructions to **Add a Profile or Bundle** for explanation of settings.
    a. Under the **Select** tab, click on the profile or bundle name you would like to copy. This will take you to the **Edit** page which you will then select the **Copy** button and make changes to any of the settings, courses, due date, recurrence date, and enrollment configuration needed. This will only create a copy of the profile or bundle. Both the original and copy will be available to you.
    b. Under the **Select** tab, click on the profile or bundle name you would like to edit. This will take you to the **Edit** page which you can then make the necessary changes.
4. Click **Save** and wait for the green confirmation bar.

View Reports

The view reports tool allows the administrator to generate reports on the hierarchy groups and/or individuals within their authority.

To Run Reports on Courses

1. Click on the **View Reports** icon in the admin menu.
2. Navigate through your hierarchy tree to the group whose information you want to view.
3. Under the **Filter** tab, select the dates and filters you would like to apply to the reports in the left-hand box.
4. Under the **Filter** tab, select the courses you would like to pull information for. By default, all courses are selected.
5. Click **Apply Filters**.
6. Now that you have set your report parameters, you can navigate through the other tabs to view the reports within the guidelines you set.
    a. **Activity Report:** Shows all activity on courses your employees are enrolled in based on the date assigned.
    b. **Transcript Report:** Shows a summary of all courses that have been attempted. This report has the option to **Print Certificates**.
    c. **Due Date Reports:** Shows a summary of all of the due dates that have been associated with courses users are enrolled in.
    d. **Custom Reports:** If you have any custom reports available on your campus, they will be located here.
    e. **Ad Hoc Hierarchy Activity Report:** Displays a multitude of fields, including extended user and specials fields. Report columns can be configured in any order with any available field.
7. You can **Copy**, export to **Excel**, or download as a **PDF.**

To access other information not captured in standard reports, use the **Ad Hoc Hierarchy Activity Report.**

1. Click on the **Manage Groups** icon in the admin menu.
2. Navigate through your hierarchy tree to the group whose information you would like to view.
3. Click **Ad Hoc Reports** tab.
4. Choose the department or group from the hierarchy tree. Click on the folder icon next to the desired group to highlight with a check mark and click again to select.
5. Select the different information you wish to pull in the report and which columns you'd like that information to appear in.
6. Leave the **Select All Courses** box checked to view all courses or select specific courses from the list. Hold the control key and click, or click and drag to select more than one course.
7. Click **Submit**. (**Note:** To output the report to Excel, make sure the selection box is checked before clicking submit

To Run a Hierarchy Report: This report will list all users within the hierarchy tree selected.

1. Click on the **View Reports** icon in the admin menu.
2. Navigate through your hierarchy tree to the group whose information you want to view.
3. Check or un-check the **Active Users Only** above the hierarchy tree to view active users only or view all users.
4. Select the **Hierarchy Report** tab.

5. You can **Copy**, export to **Excel**, or download as a **PDF.**

Learning Events

Online training is an amazing resource that allows your employees to training anywhere at any time. However, online training only accounts for a small percentage of the learning an employee will go through in their time with you. From College courses to on the job training there is a wide variety of blended learning that you may want to track on behalf of your workers. The Learning Events tool allows you to manage and track the training your employees complete, no matter where it takes place.

To add a Learning Event to the system (Note: Events only need to be added to the system once):

1. Click on the **Learning Events** icon in the admin menu.
2. Click **Add New Event.**
3. Fill in the **Event Name.**
4. If this Learning Event only applies to a certain group within your organization, you can click **Reporting Group** and choose the hierarchy level where this Learning Event applies. Double click the Group Name to select it.
5. Choose the **Event Type** from the drop-down menu.
6. Fill in the **Duration** of this training in hours.
7. If you do not want to allow certificates for this Learning Event, uncheck the **Allow Certificates** check box.
8. Optionally you can add a **Repeat Interval** and a **Description**.
9. Click **Save** and wait for the green confirmation bar.

To record a Learning Event to your employees' transcripts:

1. Click on the **Learning Events** icon in the admin menu.
2. By default, the **Only My Learning Events** checkbox is checked. This means that if you would like to see Online Courses, you need to uncheck this box.
3. Use the filters to narrow down the course list if necessary.
4. Select the circular radial button next to the course you would like to record.
5. Set the **Event Date** for the course you selected.
6. Click on the **Users** tab.
7. At the top of the page you can set the default status (Complete or Incomplete) and the default grade for the users you select.
8. Check the checkboxes next to the names of the employees who participated in the training. (**Note**: If you check the box within the heading bar you can select all users then uncheck those who did not participate.)
9. You can then adjust the status and grade based on individual's results.
10. Click **Save.**

Confirm Enrollment by clicking **Save** in the pop-up box and wait for the green confirmation bar.

Manage Policies & SOPs

The manage policies and SOPs tool allows the administrator to create, edit, manage and assign policies and SOPs to Workplace Colleges (WPC).

To Add a Policy:

1. Click on the **Manage Policies/SOPs** icon in the admin menu.
2. Fill the Policy Name and Description fields, select Active to make it active immediately, select Policy, choose the Reporting Group, and click Upload File to upload your policy PDF. Select the acknowledgement statement you want associated with the policy.
3. Click Assign WPC. Check the boxes next to the Workplace Colleges you want the policy to reside in.
4. Click Preview to preview your policy.
5. Click Save.

To Add a SOP:

1. Click on the **Manage Policies/SOPs** icon in the admin menu.
2. Fill the Policy Name and Description fields, select Active to make it active immediately, select SOP, choose the Reporting Group, and click Upload File to upload your policy PDF. Select the catalog and the acknowledgement statement you want associated with the policy.
3. Click Assign WPC. Check the boxes next to the Workplace Colleges you want the SOP to reside in.
4. Click Preview to preview your SOP.
5. Click Save.

Users can now enroll themselves in the newly created policies and SOPs through the Workplace Colleges or an admin can assign these through the Assign Training tool.

If you experience any difficulty contact SAIF Learning Center's Campus Administrator at

(503) 373-8200 or email LearningCenter@saif.com.