ADMINISTRATIVE USER GUIDE FOR THE APTI-LEARN LEARNING MANAGEMENT SYSTEM (LMS)

Software Version 2.6

September 2012

Prepared by EM-Assist

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INTRODUCING THE APTI-LEARN LMS

The APTI-Learn Learning Management System (LMS) is an interactive Web-based application used to deliver training, track individual user progress, and report on training statistics to improve processes and achieve training goals.

The LMS enables the right training to be delivered to the right people at the right time. It monitors student participation, assesses student performance, and generates reports in a user-friendly format.

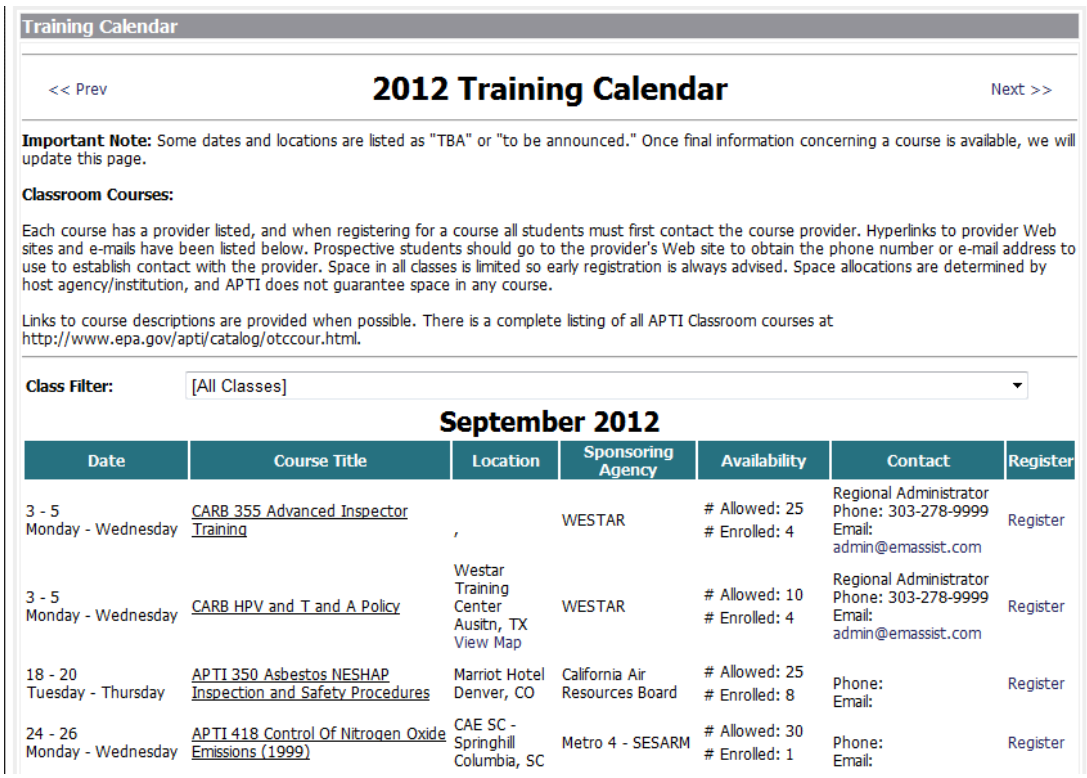
The features, screenshots, and names of certain items may not exactly match what you see on the computer screen, depending on how the LMS has been configured.

1 HOME

The Home page is the default page shown when users login. In order to access it from other locations in the LMS, click the Home link on the top menu. The Home page displays a message that can be customized by the administrator. It is also where students can access documents made available for download by the administrator.

1.1 TRAINING CALENDAR

The Home page provides access to the Training Calendar. Students can view scheduled training classes in a year-at-a-glance fashion. Links are provided to register for future courses, view class descriptions, and contact training coordinators via email.



Training Calendar

<< Prev **2012 Training Calendar** Next >>

Important Note: Some dates and locations are listed as "TBA" or "to be announced." Once final information concerning a course is available, we will update this page.

Classroom Courses:

Each course has a provider listed, and when registering for a course all students must first contact the course provider. Hyperlinks to provider Web sites and e-mails have been listed below. Prospective students should go to the provider's Web site to obtain the phone number or e-mail address to use to establish contact with the provider. Space in all classes is limited so early registration is always advised. Space allocations are determined by host agency/institution, and APTI does not guarantee space in any course.

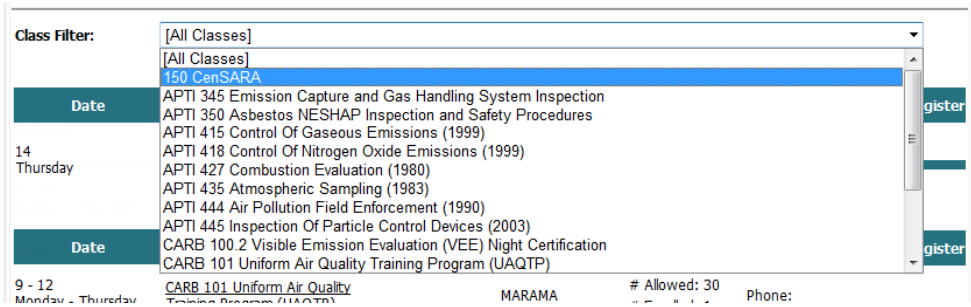
Links to course descriptions are provided when possible. There is a complete listing of all APTI Classroom courses at http://www.epa.gov/apti/catalog/otccour.html.

Class Filter: [All Classes]

September 2012

Date	Course Title	Location	Sponsoring Agency	Availability	Contact	Register
3 - 5 Monday - Wednesday	CARB 355 Advanced Inspector Training	,	WESTAR	# Allowed: 25 # Enrolled: 4	Regional Administrator Phone: 303-278-9999 Email: admin@emassist.com	Register
3 - 5 Monday - Wednesday	CARB HPV and T and A Policy	Westar Training Center Austin, TX View Map	WESTAR	# Allowed: 10 # Enrolled: 4	Regional Administrator Phone: 303-278-9999 Email: admin@emassist.com	Register
18 - 20 Tuesday - Thursday	APTI 350 Asbestos NESHAP Inspection and Safety Procedures	Marriot Hotel Denver, CO	California Air Resources Board	# Allowed: 25 # Enrolled: 8	Phone: Email:	Register
24 - 26 Monday - Wednesday	APTI 418 Control Of Nitrogen Oxide Emissions (1999)	CAE SC - Springhill Columbia, SC	Metro 4 - SESARM	# Allowed: 30 # Enrolled: 1	Phone: Email:	Register

Users can filter the list using the Class filter drop-down list.



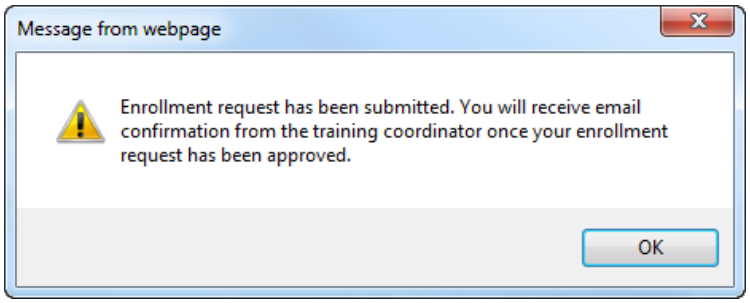
Class Filter: [All Classes]

[All Classes]
150 CenSARA
APTI 345 Emission Capture and Gas Handling System Inspection
APTI 350 Asbestos NESHAP Inspection and Safety Procedures
APTI 415 Control Of Gaseous Emissions (1999)
APTI 418 Control Of Nitrogen Oxide Emissions (1999)
APTI 427 Combustion Evaluation (1980)
APTI 435 Atmospheric Sampling (1983)
APTI 444 Air Pollution Field Enforcement (1990)
APTI 445 Inspection Of Particle Control Devices (2003)
CARB 100.2 Visible Emission Evaluation (VEE) Night Certification
CARB 101 Uniform Air Quality Training Program (UAQTP)

To register for a class, click the Register under Actions in the course list.

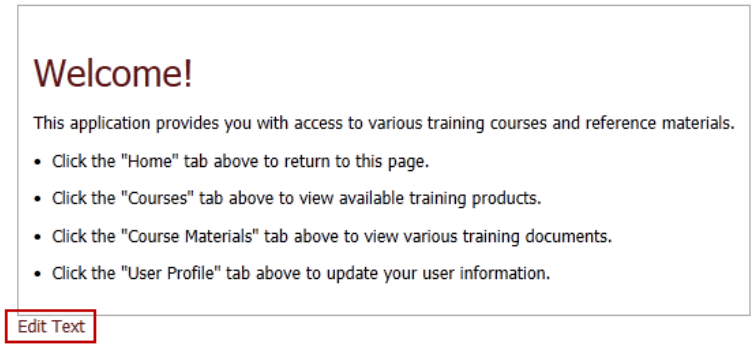
NOTE: Only classes in the futureshow a Register link.

The system displays a message informing the student that an enrollment request has been submitted. The stdent will receive an email confirmation once their enrollment has been approved by the appropriate training coordinator.



1.2 Edit Text

The Edit Text option on the homepage allows administrators to change the text users see when they access the home page.



1. Click Edit Text.
2. Enter in the desired message using the formatting controls, or switch to HTML view to enter HTML directly.
3. Click Submit Changes when finished.
4. Close the window and the changes will appear on the home page.

If the Edit Text window does not appear when you click the link, you may need to turn off your pop-up blocker or add an exception for the website. Contact your IT department if you do not know how to add an exception or cannot do so.

2 My Training

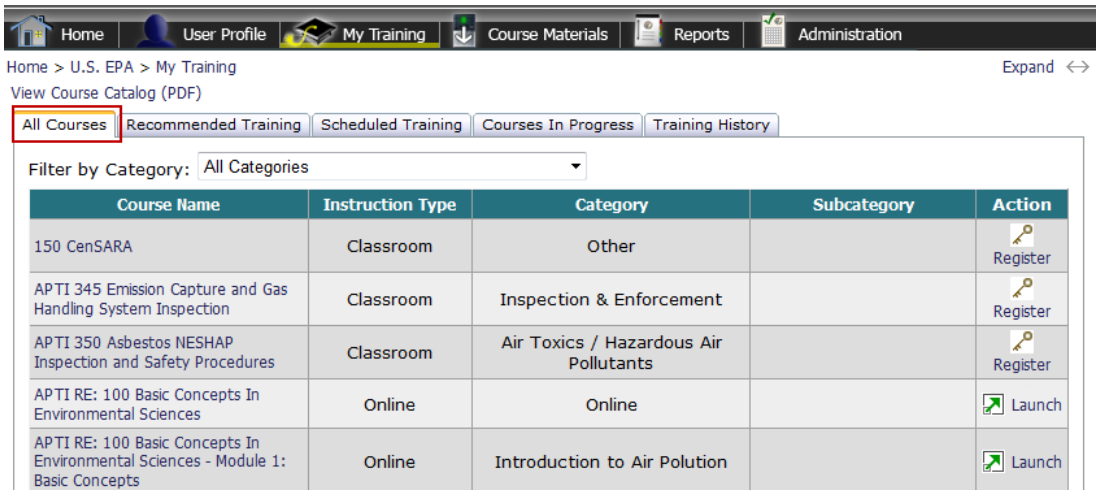
Users can view all course activity using the My Training menu option. Users can view:

- All Courses - A list of all available courses (both online and classroom training)
- Recommended Training - Recommended training based on job functions
- Scheduled Training – Classes the student is currently signed up for
- Courses in Progress – Online courses that are already started, but not yet completed
- Training History – Online and/or Classroom courses they have completed in the past. Course evaluations and course certificates are accessed from this tab.

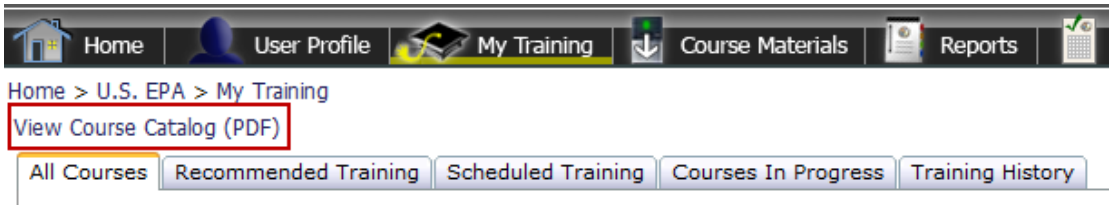
2.1 All Courses

The All Courses tab displays all courses within the LMS and can be filtered by category. To view all courses:

1. Select the All Courses tab under My Training.

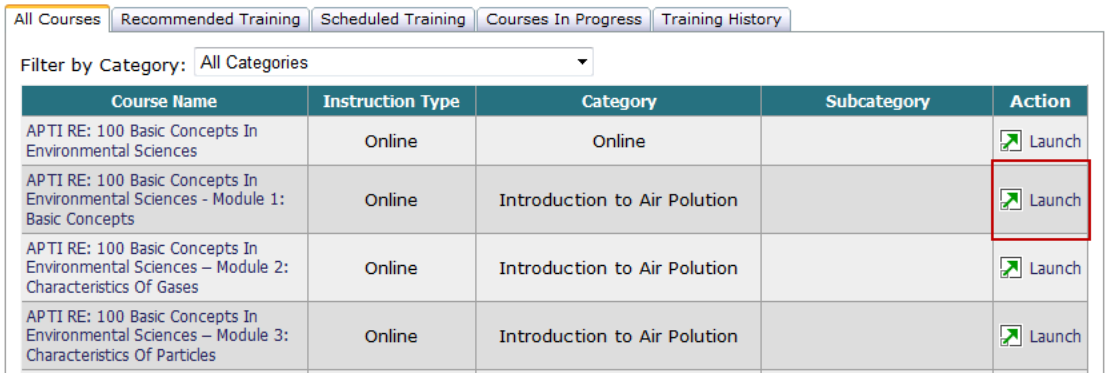


2. You can also click the View Course Catalog (PDF) to view the official course catalog published periodically by the training committee.

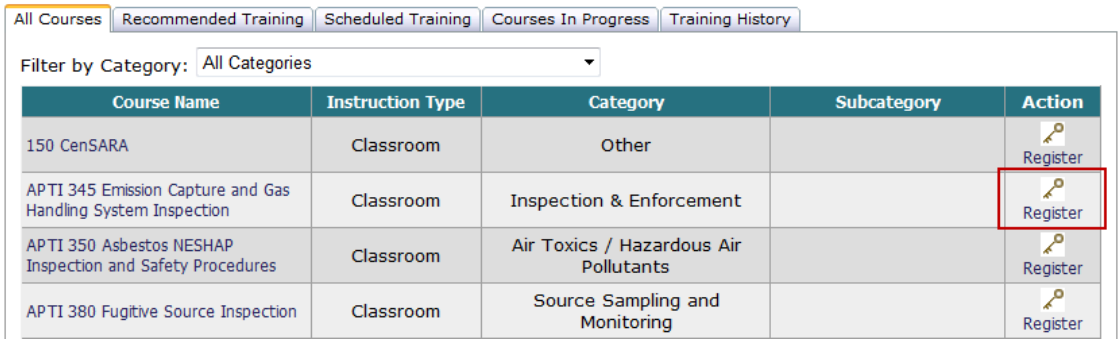


3. Optionally, select the Filter by Category drop-down menu to view a subset of courses by category.

4. Click Launch to open an online course.



5. Click Register to sign up for a class.



6. This will open the training calendar window from which the student can locate a particular course date and submit a registration request.

2.2 Recommended Training

The Recommended Training tab displays a list of online and/or classroom courses that have been associated with the student's job function(s). The Selection Criteria column conveys the relevant job function that each course addresses. Similar to the "All Courses" page, online courses can be launched and registration requests can be made from the provided links.

The status column displays the course status, and the student can register for or open the course using the options in the action column.

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

The following courses are recommended based on your user profile.

Course	Instruction Type	Selection Criteria	Status	Action
APTI 415 Control Of Gaseous Emissions (1999)	Classroom	Functional Areas : Planning/ Regulation Development	notStarted	Register
APTI SI: 300 Introduction to Air Pollution Toxicology	Online	Functional Areas : Emissions Estimation & Inventory Development	completed	Launch
APTI SI: 417 Controlling Voc Emissions From Leaking Process Equipment	Online	Functional Areas : Planning/ Regulation Development	completed	Launch
APTI SI: 437 Air Pollution Control Technology Series	Online	Functional Areas : Planning/ Regulation Development	inProgress	Launch

2.3 Scheduled Training

"Scheduled Training" displays a list of classroom training courses for which this student is currently registered. The Start and End dates detail the beginning and end dates of the course. The student can use the status column to see if they are enrolled or if they are on the waiting list for the course. The student can optionally un-enroll from classes using the "Un-enroll" button. Upon un-enrolling, emails will be sent to both instructor and training coordinator.

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

Course	Location	Start	End	Status	
CARB 260 Oil Field Production	Houston - TCEQ (Houston,TX)	10/01/2012	10/05/2012	On Wait List	Unenroll
CARB HPV and T and A Policy	Westar Training Center (Ausitn,TX)	10/01/2012	10/03/2012	On Wait List	Unenroll
APTI 418 Control Of Nitrogen Oxide Emissions (1999)	CAE SC - Springhill (Columbia,SC)	09/24/2012	09/26/2012	On Wait List	Unenroll
APTI 350 Asbestos NESHAP Inspection and Safety Procedures	Marriot Hotel (Denver,CO)	09/18/2012	09/20/2012	Enrolled	Unenroll
CARB HPV and T and A Policy	Westar Training Center (Ausitn,TX)	09/03/2012	09/05/2012	On Wait List	Unenroll
150 CenSARA		08/27/2012	08/29/2012	Enrolled	Unenroll
CARB 101 Uniform Air Quality Training Program (UAQTP)	NC DAQ Training Room (Raleigh,NC)	01/07/2013	01/09/2013	On Wait List	Unenroll

2.4 Courses in Progress

"Courses In Progress" displays a list of online training courses that the student has started, but not yet completed. From this page they can view the courses they have started, view the time spent in each course (Note: This is total time spent), and launch the online course, returning to the point where they last left off . (Note: they can also launch the course from the All Courses and/or Recommended Training

pages. Regardless of where they launch it from, if they've previously started the course, they will always return to the spot where they last left off).

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

Course	Time Spent (HR:MIN:SEC)	Last Date Accessed	Status	Action
APTI RE: 100 Basic Concepts In Environmental Sciences	00:05:16	8/24/2012 8:02:33 AM	inProgress	Launch
APTI RE: 100 Basic Concepts In Environmental Sciences - Module 1: Basic Concepts	00:00:53	8/22/2012 9:41:18 AM	inProgress	Launch
APTI SI: 105 Introduction To Air Pollution Control	00:01:36	8/21/2012 11:20:55 AM	inProgress	Launch
APTI SI: 303 Chain-Of-Custody	00:01:42	8/15/2012 11:37:48 AM	inProgress	Launch
APTI SI: 437 Air Pollution Control Technology Series	11:33:33	8/9/2012 10:01:18 AM	inProgress	Launch
APTI SI: 476B Continuous Emission Monitoring Systems – Operation And Maintenance Of Gas Monitors	00:19:44	8/22/2012 11:14:56 AM	inProgress	Launch

2.5 Training History

The Training History enables users to view all training completed to-date. From here, they can submit course evaluations, print course certificates, and print a student transcript and report card.

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

Print Student Transcript | Print Student Report Card

Refresh

Start Date	End Date	Course	Instruction Type	Status	Evaluation Completed	Evaluation	Certificate
08/15/2012	08/15/2012	APTI 345 Emission Capture and Gas Handling System Inspection	Classroom	Passed	☑	Eval Completed	Print Certificate
08/07/2012	08/07/2012	APTI SI: 422 Air Pollution Control Orientation Course	Self-Instruction	Completed	☐	Not Required	Print Certificate
07/27/2012	07/27/2012	APTI SI: 417 Controlling Voc Emissions From Leaking Process Equipment	Self-Instruction	Completed	☐	Not Required	Print Certificate

Click Print Certificate for the desired course.

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

Print Student Transcript | Print Student Report Card

Refresh

Start Date	End Date	Course	Instruction Type	Status	Evaluation Completed	Evaluation	Certificate
08/15/2012	08/15/2012	APTI 345 Emission Capture and Gas Handling System Inspection	Classroom	Passed	☑	Eval Completed	Print Certificate
08/07/2012	08/07/2012	APTI SI: 422 Air Pollution Control Orientation Course	Self-Instruction	Completed	☐	Not Required	Print Certificate
07/27/2012	07/27/2012	APTI SI: 417 Controlling Voc Emissions From Leaking Process Equipment	Self-Instruction	Completed	☐	Not Required	Print Certificate

Click Complete Evaluation for courses they require an evaluation be completed (Note: Many courses require an evaluation be completed prior to printing the course certificate)

Click Print Student Transcript to access a list of the student's completed courses.

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

Print Student Transcript | Print Student Report Card

Refresh

Start Date	End Date	Course	Instruction Type	Status	Evaluation Completed	Evaluation	Certificate
08/15/2012	08/15/2012	APTI 345 Emission Capture and Gas Handling System Inspection	Classroom	Passed	☑	Eval Completed	Print Certificate
08/07/2012	08/07/2012	APTI SI: 422 Air Pollution Control Orientation Course	Self-Instruction	Completed	☐	Not Required	Print Certificate
07/27/2012	07/27/2012	APTI SI: 417 Controlling Voc Emissions From Leaking Process Equipment	Self-Instruction	Completed	☐	Not Required	Print Certificate

Click Print Student Report Card to access a list showing how the student performed in each completed course.

All Courses | Recommended Training | Scheduled Training | Courses In Progress | Training History

Print Student Transcript | Print Student Report Card

Refresh

Start Date	End Date	Course	Instruction Type	Status	Evaluation Completed	Evaluation	Certificate
08/15/2012	08/15/2012	APTI 345 Emission Capture and Gas Handling System Inspection	Classroom	Passed	☑	Eval Completed	Print Certificate
08/07/2012	08/07/2012	APTI SI: 422 Air Pollution Control Orientation Course	Self-Instruction	Completed	☐	Not Required	Print Certificate
07/27/2012	07/27/2012	APTI SI: 417 Controlling Voc Emissions From Leaking Process Equipment	Self-Instruction	Completed	☐	Not Required	Print Certificate

3 REPORTS

The reports section in the LMS gives administrators the ability to pull a variety of reports to view user data. With the exception of Training Metrics and Survey Results**,** each report uses the same interface for customizing the data that is displayed. For reports that contain information about users, the fields in the user profile will be represented as columns in the report to aide in searching for data.

Overview of Available Reports

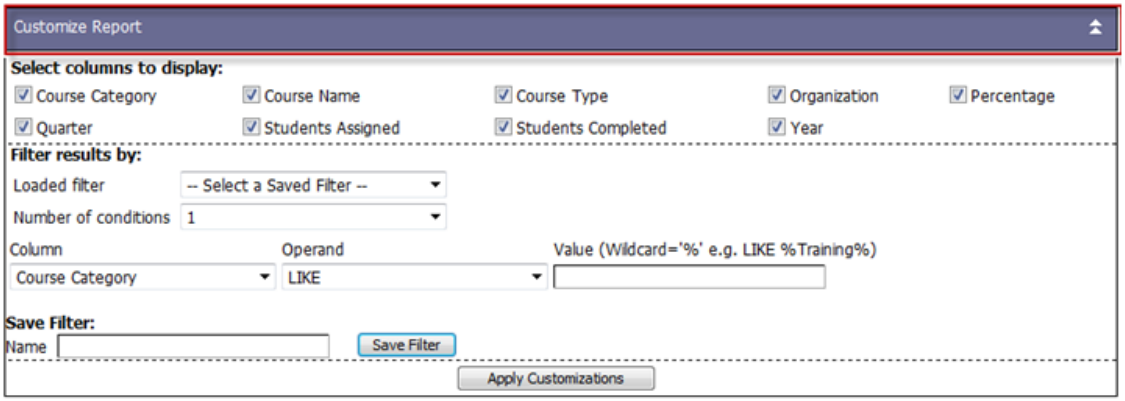
- **Online Courses(SI Training):** The Online Courses report allows the administrator to view the history of each available online course, and break down the information to show every user that has accessed the course.
- **Classroom Training:** The Classroom Training report displays all classroom titles and all the training events ever taught for each title. This report also allows the administrator to view the students enrolled in the class.
- **Users:** The Users report displays every user in the system and allows the administrator to view the users' report card. This report also allows the administrator to edit a users' profile.
- **Evaluations:** The Survey Results report shows the results for each survey created in the system. Survey results are reported anonymously.
- **Permissions:** The Permissions report provides a list of users and their assigned roles.
- **Training Metrics:** The Training Metrics report displays the completion totals for each course across the specified time range for the selected organization. The *Training Metrics* page may also include a variety of graphs that breaks down course completion, training time spent online, and classroom training.

Many reports include more columns than indicated below. This is due to how the LMS is configured. Additional columns typically match fields in the User Profile.

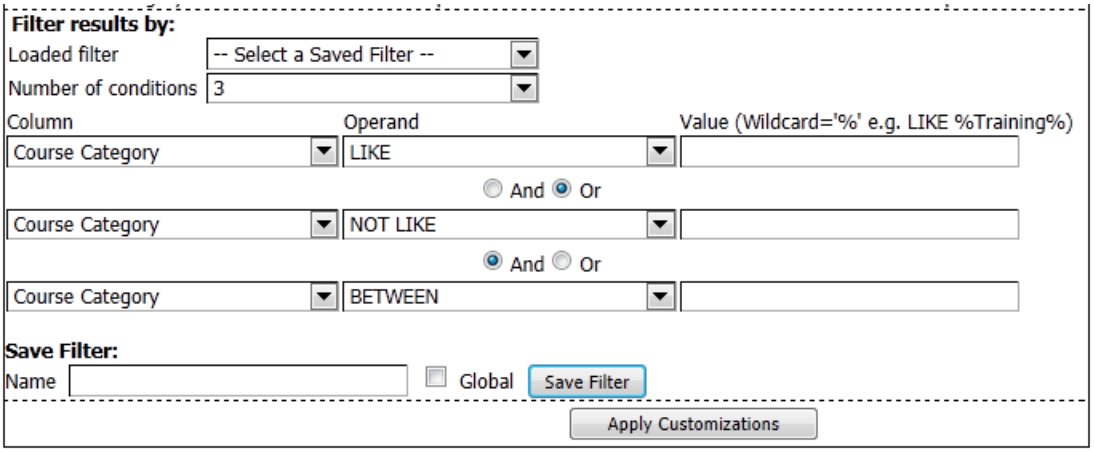
3.1 CUSTOMIZING THE REPORTS

Many reports allow for custom filtering and sorting of results. To use the customization feature:

1. Click the header labeled Customize Report to activate the customization options.
2. The Select Columns to Display area lists all the columns available in the report. Place a check in the check box next to the column name to include it in the report.



3. Select a number of conditions. Conditions are used to restrict the records that are included in the report. If more than one condition is selected, there will be an AND/OR radio selection between each. If AND is selected, the condition above and below must be met in order for the item to appear in the results. If OR is selected, either condition can be met in order for the item to show in the results.



4. Fill in each condition. Conditions have 3 items to set: Column, Operand, and Value.

   a. The Column selected will be searched; the items available within this dropdown will vary depending upon the available columns, and the current report.

   b. Choose the Operand: LIKE, NOT LIKE, or BETWEEN. Choosing LIKE will look for items including what is entered in the Value field. Choosing NOT LIKE will look for items that exclude what is entered in the Value field. Choosing BETWEEN will create two value fields to enter the lower and upper limit of a search value. For example, selecting a date column and the between operand, then entering values of 1/1/2000 and 12/31/2012 will return results between January 1, 2000 and December 31, 2012.

   c. Enter the value. Using a wildcard ("%") before and/or after the value will allow the search to return anything that contains the value. For example, if the value is entered as "%Training%" results could include items like Environmental Training, Training Courses, and Environmental Training Courses. If the wildcard is not inserted, and "Training" is entered, only those records that equal "Training" would be returned.

5. To save a filter for use at a later date, enter a name in the Name field. Checking the Global checkbox will allow the filter to be used again. Click the Save Filter button and it will be saved and appear within the "Loaded Filter" dropdown. In the future, selecting the filter will cause the report to be automatically customized with the saved selections.

6. Click Apply Customizations.

7. The filtered report will be displayed.

3.2 Exporting Reports

Many reports can be exported to another file format for further data manipulation or record keeping. To export a report:

1. Choose the format the report will be exported to from the drop-down list. Reports can be exported to PDF, Excel, or Text.

    a. **PDF:** Creates a PDF file of the reported data. The file can then be saved to your computer.

    b. **Excel:** Creates an Excel file (.xls format) for the data. Data can then be manipulated using tools within Excel.

    c. **Text:** Creates a delimited text file. This option is meant to be used to import the data into another database.

3.3 Other Features of the Reports

The section under the Customize Report area allows administrators to control how many records to view per page. The drop-down list next to the Records per Page is preloaded with values that can be selected to modify the results. If there are multiple pages of records, then page numbers will be displayed next to the Records per Page drop-down list. This allows administrators to skip through pages instead of going to the next page. The reports can also be sorted by a specific column by clicking the title of the column. Clicking the column once will sort the records by the column selected in ascending order. Clicking the column twice will sort the records in descending order. The Print option will allow the report to be printed.

3.4 Classroom Training

The Classroom Training Report is used to view all Class Titles in the LMS and their scheduling history. When the report is first opened, a list of all available Class Titles in the LMS is displayed. Clicking the View History link causes the report to list all times at which that Class Title has been scheduled. From

the View History report, a View Class link is available. Clicking View Class will load the Classroom administration page for that class.

The following fields are available on the Classroom Training report:

- **Class Title:** Title of the class.
- **Course ID:** Unique ID assigned when the course is created.
- **Description:** Description of the course. If there is no description, this column will be blank.
- **Is Active?:** Selecting this column will show whether or not the course is currently active in the system. Students can only enroll in active courses.
- **Reference Number:** This number is entered by the user when the course is created.

The following fields are available after selecting View History:

- **Date:** When the class was scheduled.
- **Instructor:** Who taught the class.
- **Organization:** What organization the class is associated with (if applicable).
- **Location:** Where the class was taught.
- **Max Class Size:** The maximum number of students eligible to enroll.
- **Reference Number:** The reference number of the class.

3.5 Online Courses

The Online Courses report is used to view the history and course details of each online course, and each student who has taken the course. When the report is first opened, a list of all online courses is displayed. Clicking the View History link will display records for students that indicate course activity. From here, click the View Details link to see information about that user's activity within that course.

The following fields are available on the Online Courses report:

- **Category:** Category of the course.
- **Course ID:** Unique ID of the course.
- **Description:** Description of the course.
- **Duration:** The time it took to complete the course (hh:mm:ss).
- **Last Updated:** The last time the course was updated.
- **Name:** The name of the course.

The following fields are available after selecting View History:

- **Course Type:** Type of course.
- **Completed?**: Yes/No value that indicates if the course has been completed.
- **Latest Date Completed:** The latest date the course was completed.
- **Course ID:** Unique ID of the course.
- **Total Time Spent:** The time the user spent in the course.

- **Course Name:** Name of the course.
- **Expiration Date:** Date when course completion expires.
- **Total Times Completed:** The number of times the user completed the course.

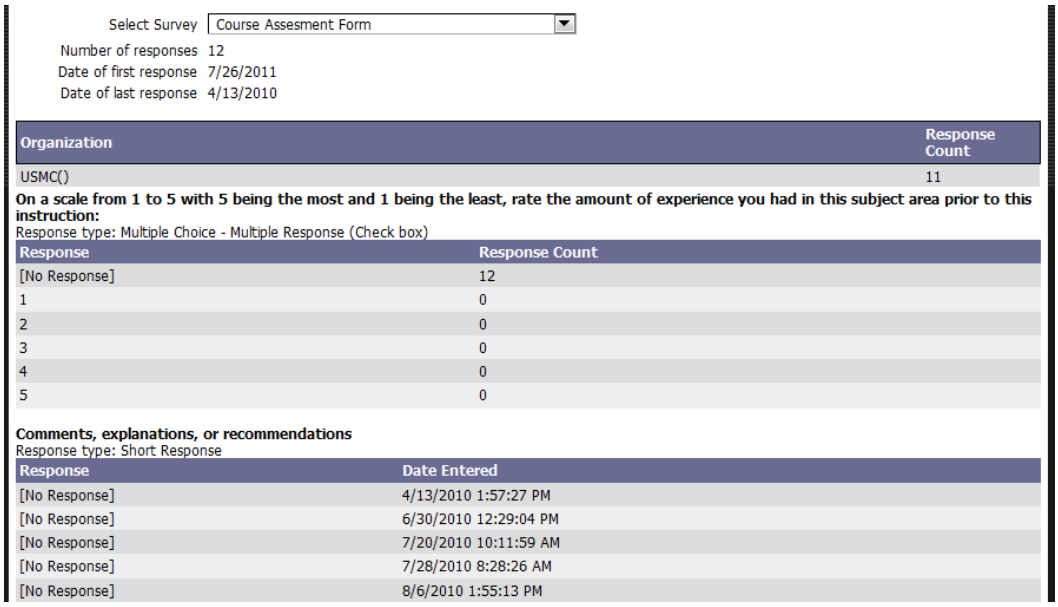
After clicking view details, a list of course sessions for the user is displayed. The following fields are available:

1. **Completed?:** Yes/No value that indicates if the course was completed during this session.
2. **Date:** Date of the course session.
3. **Time Spent:** Duration of the course session.

3.6 EVALUATIONS

Once a student takes a survey, his or her results are recorded and reported within the Survey Results report. All responses are recorded by organization. No user will be specifically cited unless they add their name to a short response.

To view the results for a survey, select the survey from the drop down menu. Each question in the survey is displayed with all responses.



Select Survey: Course Assesment Form

Number of responses 12
Date of first response 7/26/2011
Date of last response 4/13/2010

Organization	Response Count
USMC()	11

On a scale from 1 to 5 with 5 being the most and 1 being the least, rate the amount of experience you had in this subject area prior to this instruction:
Response type: Multiple Choice - Multiple Response (Check box)

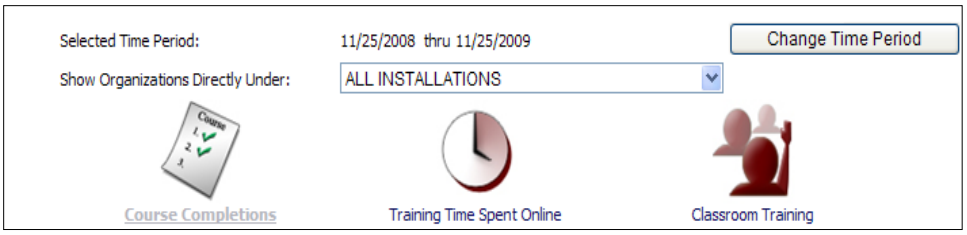
Response	Response Count
[No Response]	12
1	0
2	0
3	0
4	0
5	0

Comments, explanations, or recommendations
Response type: Short Response

Response	Date Entered
[No Response]	4/13/2010 1:57:27 PM
[No Response]	6/30/2010 12:29:04 PM
[No Response]	7/20/2010 10:11:59 AM
[No Response]	7/28/2010 8:28:26 AM
[No Response]	8/6/2010 1:55:13 PM

3.7 TRAINING METRICS

The Training Metrics report is actually three reports condensed into one location; Course Completions, Training Time Spent Online, and Classroom Training.



The Selected Time Period and Show Organizations Directly Under options will adjust the settings for all three reports.

Clicking the Change Time Period button will allow you to select any time period currently available in the system. The longer the selected period, the longer it may take to load the reports.

Click each icon to review the corresponding report.

3.7.1 Course Completions

Course Completions are displayed in four different charts.

- The first chart displays all course completions in the selected time period, with break downs for Classroom and Online courses. This chart also has two buttons below it: Course Detail and Student Detail. Clicking on either of these links will bring up a separate report with specific details on what is being reported.
- The second chart displays all course completions in the selected time period broken down by organization.
- The third chart shows only classroom courses taken during the time period broken down by organization.
- The final chart shows only online courses taken during the selected time period and is broken down by organization.

3.7.2 Training Time Spent Online

Training Time Spent Online shows information only for online courses. Each of the four charts in this report shows the information broken down by organization into total hours, total hours by month, average number of hours per student, and the average number of hours per student by month.

3.7.3 Classroom Training

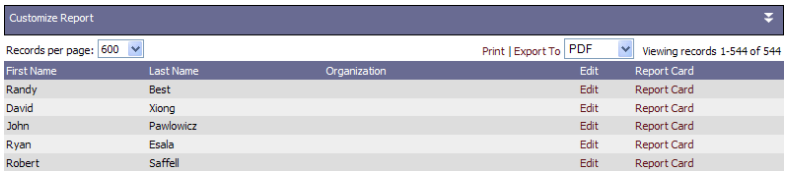
Classroom Training shows information on classroom enrollments, schedules, and sizes for the time period selected.

If no data is available for the selected organization some charts may not display.

3.8 USERS

The Users report is used to view user profile information and to access user report cards. The Report Card shows courses completed and courses viewed for online courses, and completed courses for classroom courses. From here, an administrator can print a completion certificate and transcript for the user.

To access the report, click the Report Card link across from the user's name.



The user's full transcript can be printed from the report card by clicking the Print Transcript link. Individual certificates can also be printed by clicking the Print Certificate link next to each completed course.

3.9 TRAINING METRICS

The Users report is used to view user profile information and to access user report cards. The Report Card shows courses completed and courses viewed for online courses, and completed courses for classroom courses. From here, an administrator can print a completion certificate and transcript for the user.

The Training Metrics page allows administrators to easily gather training completion data for ever course in the system for specified Organizations and at a specified date range.

To pull a report of training completion:

1. Select the month and year from the Start Date drop-down lists.
2. Select the month and year from the End Date drop-down lists.

3. Click the Organizations that apply.

4. Select the month and year from the Start Date drop-down lists.
5. Select the month and year from the End Date drop-down lists.
6. Click the Organizations that apply.
7. Click Generate Report.

After clicking Generate Report, the complete list of all the courses and the total number of completion will display below based on the information entered. Clicking the Course Title under the Courses column will redirect the administrator to either the Classroom Training Report or Online Courses reports page.

Course	Type	Total
Air Quality	Online	11
Aircraft and Helicopter Fueling and Defueling	Online	3
Aircraft and Helicopter Refueling	Online	6
Aircraft Arresting Gear	Online	3
Aircraft Deicing - Ethylene Glycol	Online	5
Aircraft Equipment Maintenance	Online	3
Aircraft Fluid Change	Online	2
Aircraft Ground Support Equipment O&M	Online	2
Aircraft Parking	Online	3
Aircraft Rescue and Firefighting Operations	Online	2
Aircraft Takeoff and Landing	Online	1
Aqueous Film Forming Foam System O&M	Online	3
Asbestos	Online	21
Aviation Fuel Analysis	Online	2
Backflow Prevention	Online	2
Battery Recharging - Non-Lead Acid	Online	4
Battery Replacement	Online	25
Battery Replacement	Online	5
Battery Storage	Online	32
Bilge Pumping	Online	2
Biological Treatment	Online	1
Bioremediation Operations	Online	2
Bluing/Parkerizing	Online	2
Boat Fueling	Online	2
Boat Operation and Maintenance	Online	4
Boat, Ramp, and Dock Cleaning	Online	4
Boiler Operations	Online	3
Brake Replacement	Online	3
Burnout Ovens	Online	3
Business Plan Management System (BPMS)	Online	34
Capacitor Replacement	Online	1
Chlorination - Swimming Pools	Online	2
Composting	Online	2
Compressed Natural Gas	Online	3
Controlled Burn Operations (Prescribed Burns)	Online	1
Cooling Tower Corrosion Control	Online	1
Defueling	Online	1
Degreasing - Aerosol	Online	3
Degreasing - Aqueous Solvent	Online	13

4 ADMINISTRATION

The available items within the Administration Menu will change depending upon the role of the user accessing it. If access is required to other pages, please consult the head administrator for your system.

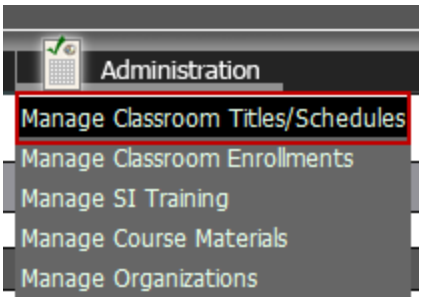
The following administrative pages may be available:

- **Certificate Signature:** Used to upload signatures that will display on the certificates.
- **Classroom Training**: Used to manage classroom training events.
- **Contacts**: Assign contacts to organizations. These contacts receive training expiration notices for students.
- **Course Prereqs:** Manage course prerequisites.
- **Create User:** Create user accounts.
- Data List Filtering:
- **Discussions:** Displays all discussion threads active in the system.
- **Email Users:** Opens an email message to a custom selection of users.
- **Merge Users:** Merge two user profiles into one.
- **Online Courses:** Adjust properties of online courses.
- **Organizations**: Manage the organizational hierarchy.
- **Profile Lists:** Manage data that is part of the User Profile and Training Criteria system.
- **Surveys**: Manage surveys for delivery upon course completion.
- **Training Criteria:** Manages training criteria rules used to create individualized training plans.
- **Training Subscriptions:** Manages reminders for students to complete their training plan.
- **UIC & Training Totals:** Associate UICs, or another secondary identifier, with organizations and manage the number of people assigned.
- **Unknown Organization:** Provides a list of all Organizations that aren't recognized in the system.
- **Users:** Modify user records and roles.
- **Video:** Upload or remove existing videos.

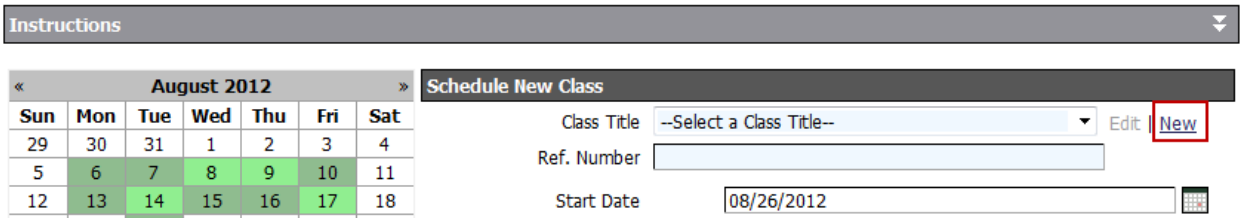
4.1 MANAGE CLASSROOM TITLES/SCHEDULES

To schedule a new class or manage existing classes:

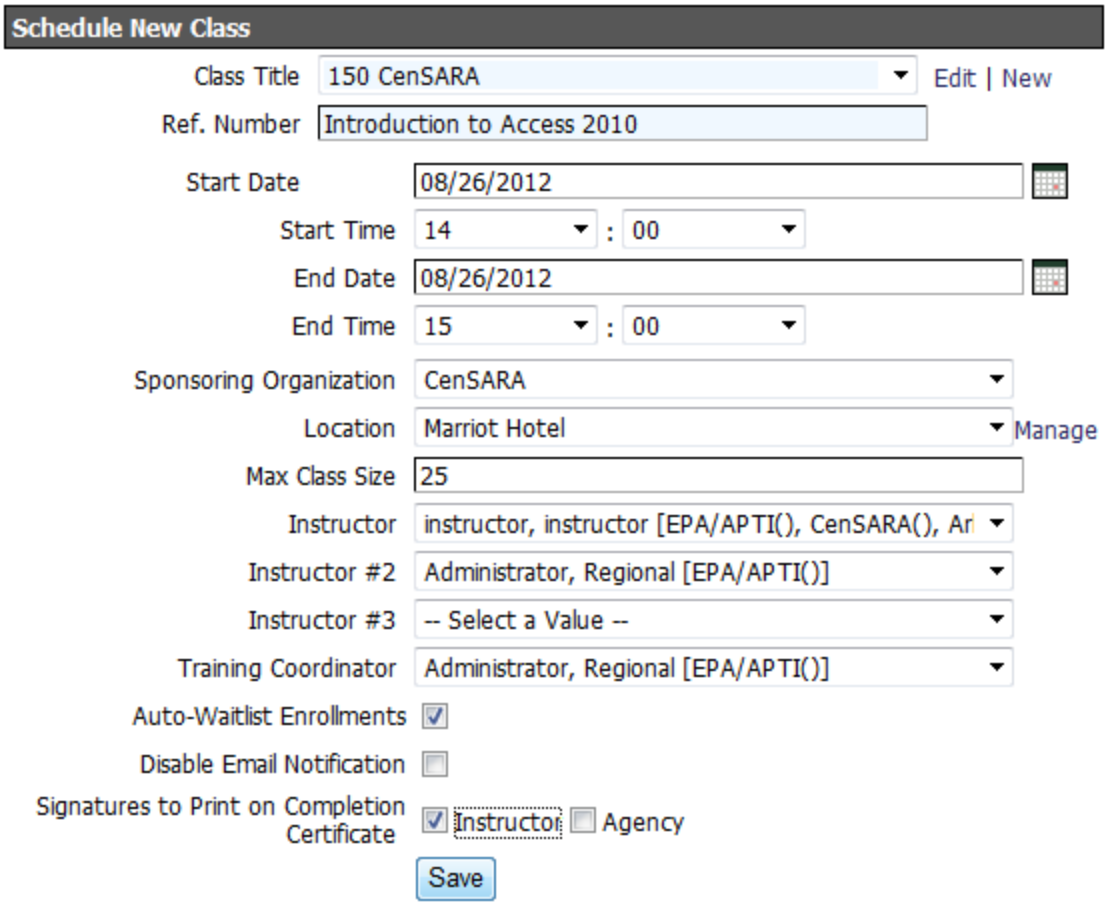
1. Select Manage Classroom Titles/Schedules from the Administration menu.



2. Click New to add a new class title.



3. Enter the class information and click Save Class Title. The new class will appear in the list of class titles.
4. To schedule a class, select the class title from the drop-down menu and enter the pertinent class information.

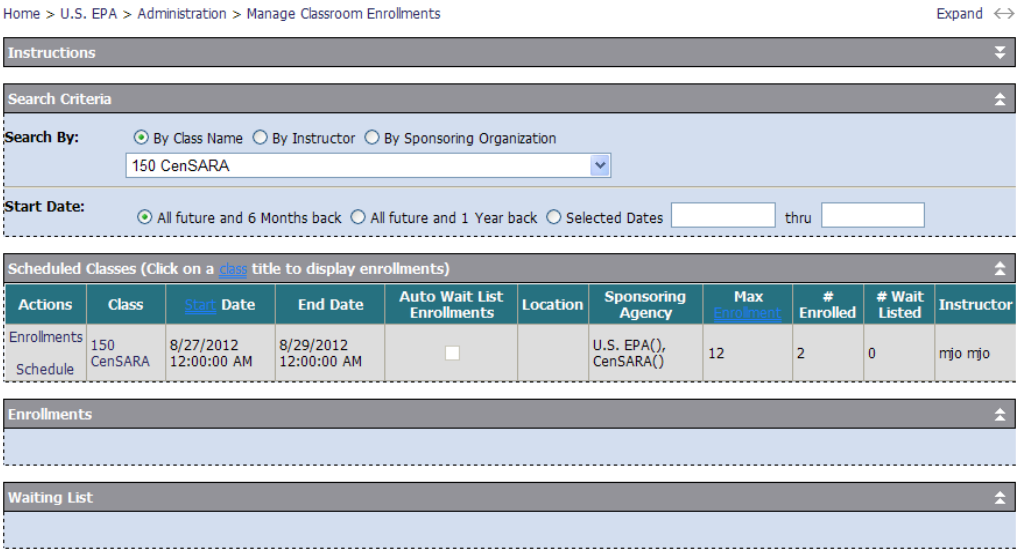


5. Click Save when finished. The class will display on the Training Calendar.

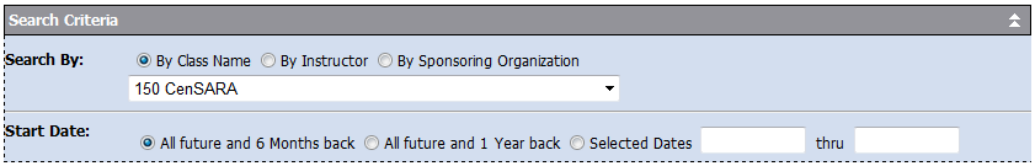
4.2 Manage Classroom Enrollments

To manage classroom enrollments:

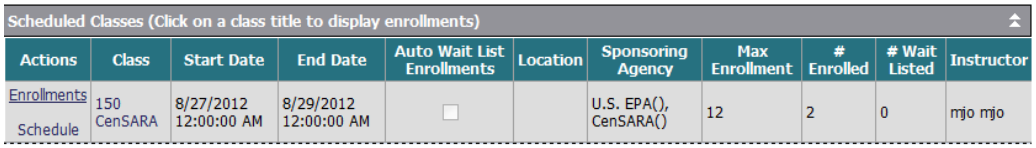
1. Select Manage Classroom Enrollments from the Administration menu.



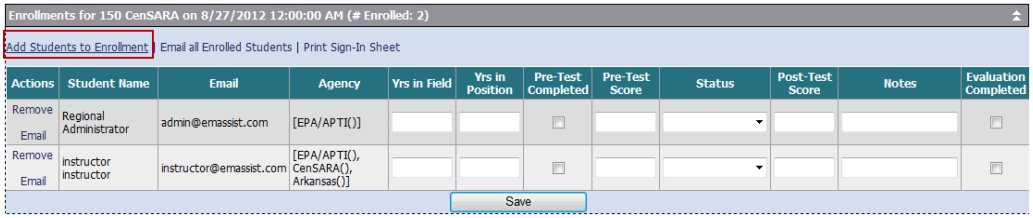
2. Search for the scheduled class by class name, instructor, or organization. You can also search by specific class date criteria.



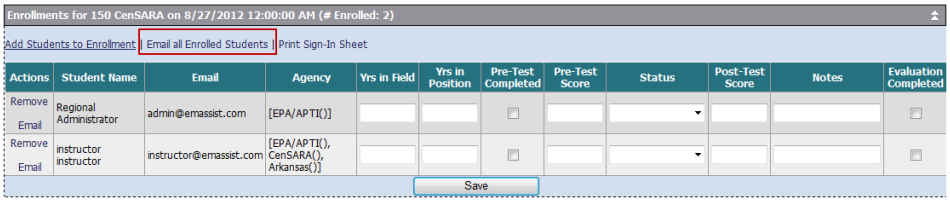
3. Click a class title or the Enrollments link to display students enrolled in that class.



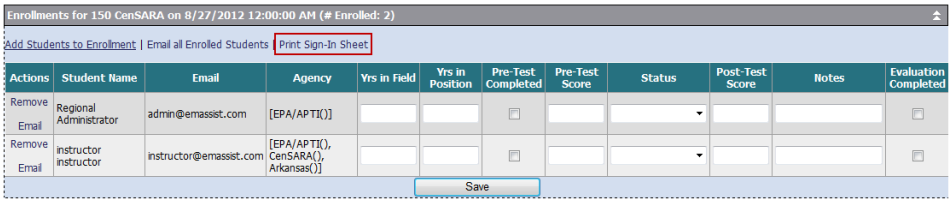
4. Click Add Students to Enrollment to add students to the class.



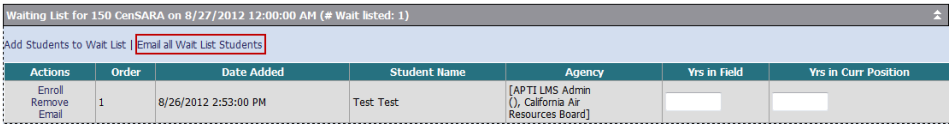
5. Click Submit when finished.
6. Click Email All Enrolled Students to send email notifications to all students in the class.



7. Click Print Sign-in Sheet to access a class roster.



8. Click Save if any changes were made to the enrollments.
9. Click Add Students to Wait List to add students who are on the waiting list.
10. Enter any part of a student name or organization in the search box then select the correct name from the search results.
11. Press Add Selected Student and then Submit to save the student to the waiting list.
12. Click Email All Wait List Students to send notifications to all students on the waiting list.

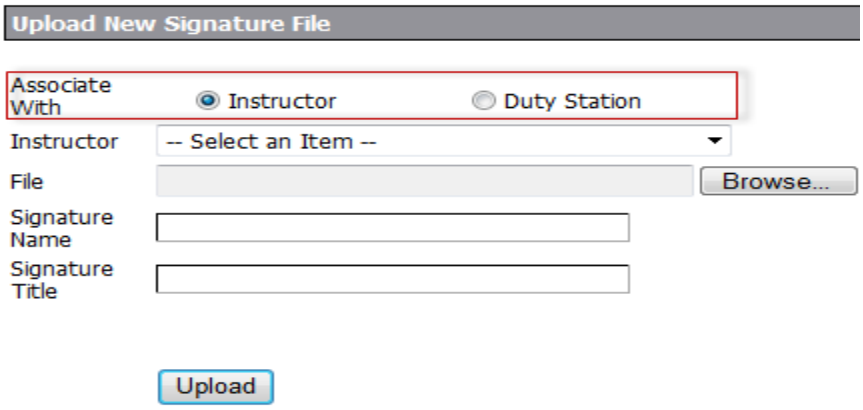


4.3 CERTIFICATE SIGNATURE

The Certificate Signature page allows administrators to upload signature files and assign the signature to a specific Duty Station or Instructor.

To upload a signature image:

1. Choose whether the signature is for an Instructor or a Duty Station in the Associate With section.



2. Select the Instructor or Duty Station from the drop-down list.
3. Click Browse and choose the signature image file.
4. Enter in the Name for the signature in the Signature Name field.
5. Enter in the Title of the signature in the Signature Title field.
6. Click Upload.

After uploading the image, the record of the signature will appear at the bottom of the page in the Existing Signature Files section. In this area, administrators will be able to view the signature and delete any record not being used.

Existing Signature Files

File	Duty Station	Instructor	Signature Title	Signature Name	Uploaded By	
Dan's little signature.JPG	MCB Camp Pendleton		Environmental Training Program Manager	Dan Felkins	Mahaffey, John	Delete
Pat_249_by_50.jpg		Dillow, Patricia	Environmental Training Coordinator	Patricia Dillow	Dillow, Patricia	Delete
My sign for ELMS.JPG		DePaolo, Andrew	EMS/CETEP Coordinator, MCAS Miramar	Andrew J. DePaolo	DePaolo, Andrew	Delete
chris_kost_sig.JPG	MCAS Yuma (AZ)		Comprehensive Environmental Training \n and Education Program Coordinator	Christian Kost	User, End	Delete
CETEP Sig 001.jpg	MCMWTC Bridgeport		CETEP Coordinator	Douglas P. Lister	Lister, Doug	Delete

To view and delete signatures:

1. Click on the link under the File column to view the signature image.
2. Click on the Delete link on the right side of the signature record to delete the record.

4.4 Classroom Training

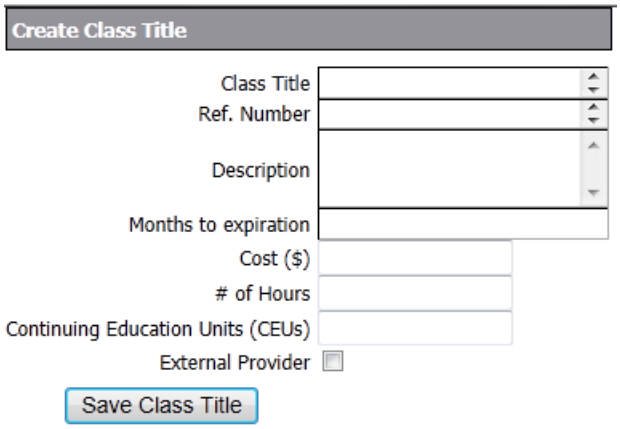
The Classroom Training administration page allows administrators to create new Class Titles, schedule classroom trainings and manage student enrollment.

Students will receive email notifications when their enrollment status changes, when information about a class changes, and if the class is canceled. Depending on LMS configuration the instructor may be copied on these messages as well.

4.4.1 Class Titles

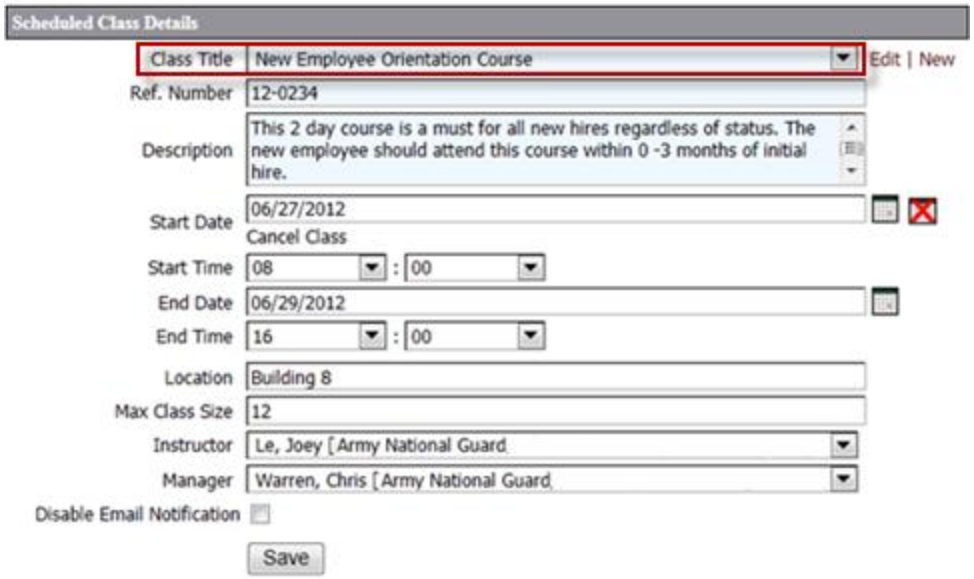
A Class Title is a course that will be scheduled and taught. To create a Class Title:

1. Click New next to the Class Title dropdown menu.
2. The Create Class Title window will appear. Enter the Class Title. This is the name of the course.
3. Enter the Reference Number if needed.
4. Enter a description of the course. This is an optional field that will be displayed to the user when they attempt to register for the class.
5. Enter the Months to Expiration if desired. This number will be the length of time, in months, the user can go without retaking the course, or being reminded to retake the course. If a course is expired, it will show as such in the Courses list.
6. Enter the Cost in dollars, the number of hours, and the number of continuing education units (CEUs). These fields are optional.
7. If the course is offered by an external provider, check the External Provider checkbox. This will make the course unavailable for daily/monthly scheduling, but allows users to be given credit without having to schedule the class within the LMS. For more information see External Courses.
8. Click Save Class Title. Close the window to return to the class scheduling interface.



Any of the existing Class Titles can be edited or deactivated. Editing the Class Title will update the information for all scheduled instances of the Class Title.

1. Select the Class Title from the Class Title drop-down list.



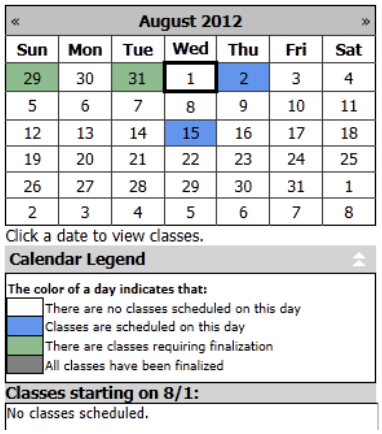
2. Click Edit to the right of the drop-down list.
3. After clicking Edit, the Class Title Editor will appear. Update the appropriate fields and Click Update Class Title to save the changes.
4. Clicking Deactivate Class Title will inactivate the Class Title. The Class Title will now display in the drop-down list with "[Inactive]" next to the title. Inactive Class Titles will not be available to students for registration.

4.4.2 Scheduling a Class Title

To schedule a Class Title and make it available for registration by students:

1. Select the desired Class Title from the drop down menu. The reference number and description information will be filled in automatically.
2. Choose a start date and time along with an end date and time. The dates can be selected by clicking on the calendar icon.
3. Select the desired organization if available. The list of available organizations is typically restricted to just those that also indicate a geographic location. This value can then be used by students to search for classes.
4. Enter a location. The location is meant to indicate a building or other physical location at which the course will be taught.
5. Enter a numeric value for the Maximum Class Size. This will prevent students from enrolling and instead place them on a waiting list once the value is reached.
6. Select an Instructor. The instructor may be carbon copied on email notifications to students depending on the LMS configuration. If a desired instructor is not listed, it may be necessary to assign that user to a role that includes the necessary permissions.

7. If available, select the organization and instructor certificate check boxes if the completion certificate is do include those signatures. Certificate signatures are controlled from the Certificate Signatures administration page.
8. Once you have entered in all the necessary information, press the Save button to schedule the class. It will appear immediately on the calendar to the left.



To cancel a scheduled class:

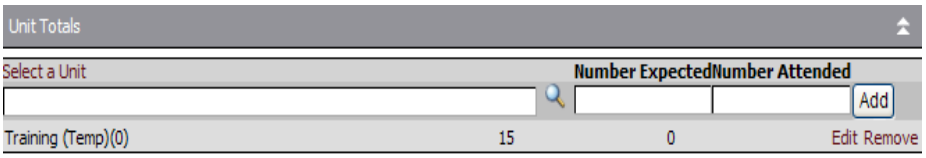
1. Select the date from the calendar.
2. Select the class from the list that appears below the Calendar Legend.
3. Click the icon to cancel the class.

4.4.2.1 Class Manager

This role has overall responsibility for the content and enrollment of the class. This is separate from the instructor that is assigned to each and every scheduled instance of a class. The class manager will automatically be copied on all email correspondence that the instructor currently receives. Class managers are established on the User Management page by assigning a user to the "Class Manager" role. Once assigned, these user names are listed in the Class Manager dropdown list shown on the Classroom administration page.

4.4.3 Unit Totals

The unit totals section allows either the instructor or the class manager to track the number of students from a specified unit that don't currently have an account registered in the LMS. This section helps to keep training totals accurate.

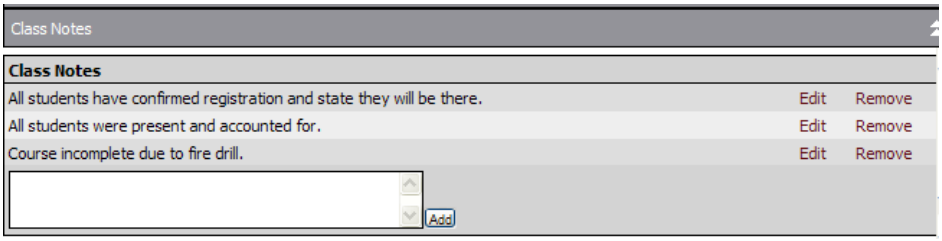


To add information to the unit totals:

1. Click the Unit Totals bar to expand the section if necessary.
2. Select the desired unit by clicking the magnifying glass. This will open another window. Click on the desired unit then click the Select button.
3. Once the unit is selected, add the number expected (and the number attended if the class has already occurred) and click add. The Number Expected field can be used to aid in managing class size.
4. Once the unit totals are added, they can be edited, or removed by clicking the corresponding link.

4.4.4 Class Notes

Class Notes can be added to the class at any time. Class notes will only be viewable by other instructors or class managers.

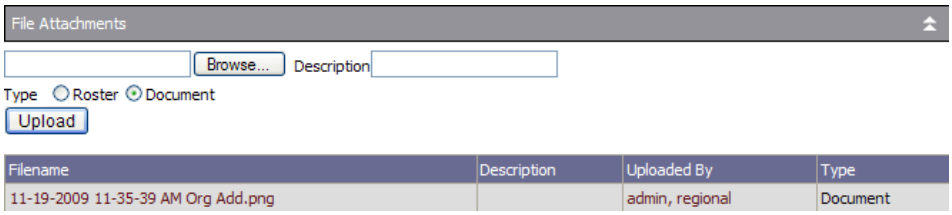


To add class notes:

1. Click the Class Notes bar to expand the section if necessary.
2. Type the note into the textbox and click add. The note will appear above the text box.
3. Use the edit or remove buttons to change or delete the note at any time.

4.4.5 File Attachments

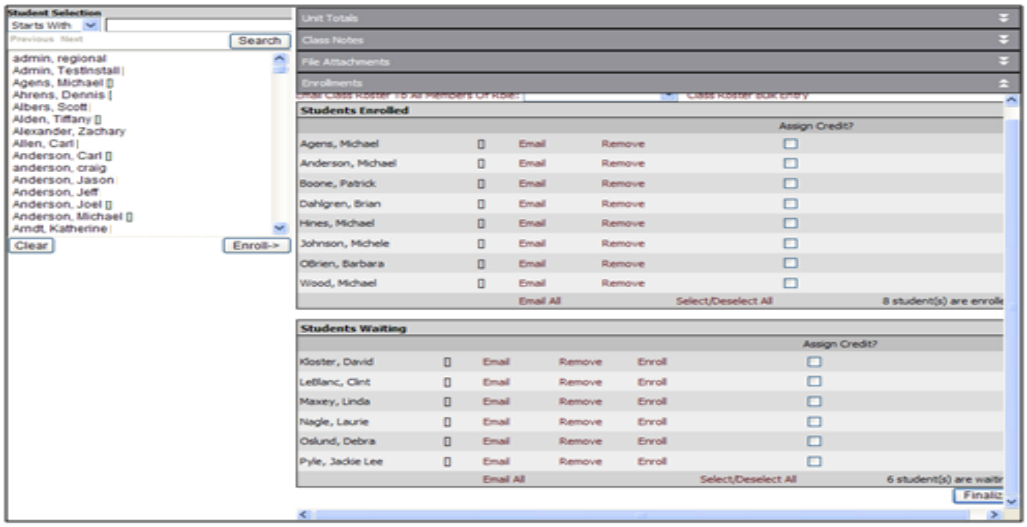
The File Attachment section allows instructors or class managers to load documents that the student may need for the class. The documents will be available to the students on their Downloads page once the student is enrolled.



To attach a file to the class:

1. Click the File Attachments bar to expand the section if necessary.
2. Use the Browse button to find the file to attach. Select the file and click the Open button.
3. Enter a Description of the file that will make it easily identifiable.
4. Select the Roster or Document type. Rosters will not be available for students to download.
5. Click the Upload button. The file will appear below the upload button with the specific filename and description you added, who uploaded the document, and the selected document type.

4.4.6 Student Enrollment and Class Finalization



To enroll a student in the class:

1. Click the Enrollments bar to expand the section if necessary.
2. Select the students or students from the Student Selection box.
3. Click the Enroll button. The student will be enrolled in the class unless it has already reached its Maximum Class Size. If the class is full, the student will be added automatically to the waiting list.

If a class has a waiting list and one or more of the enrolled students are removed, the students on the waiting list can be moved into the enrolled list. To do this, click the Enroll link on the correct student.

Students can be manually promoted from the waiting list to the enrolled list. To do so, click the Enroll link next to a student in the waiting list.

Clicking the Email link will open a new window to email the student. Clicking Email All will include all students in the list.

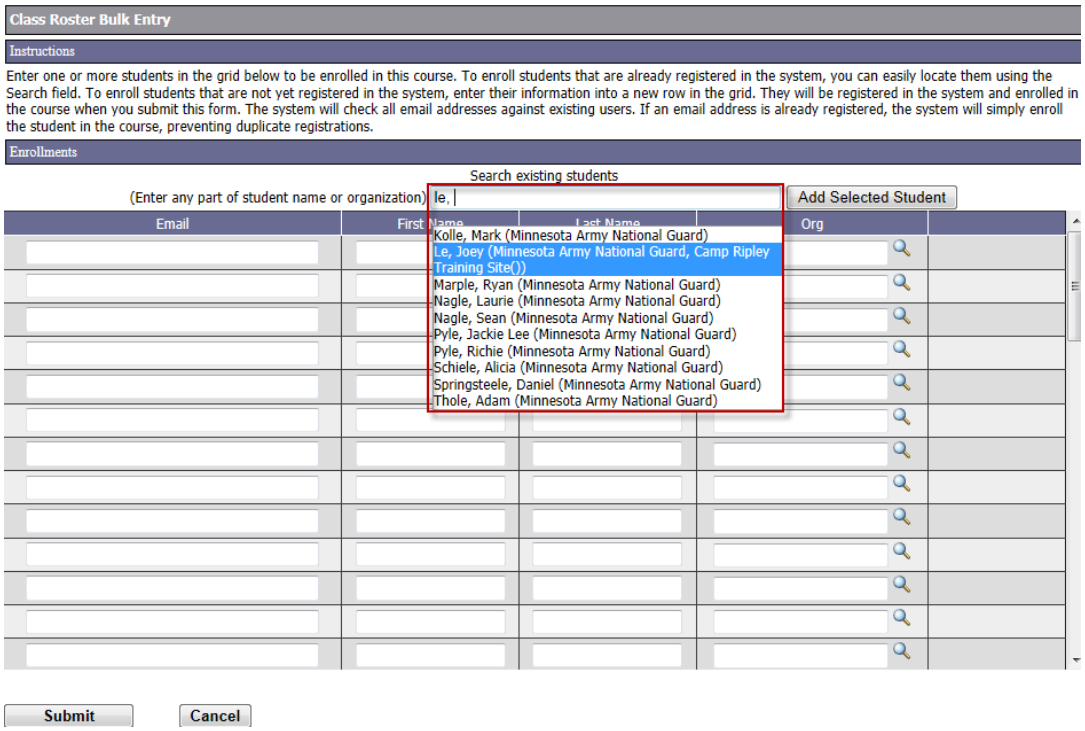
If the selected class occurs in the past it can be Finalized. It is necessary to finalize a class in order for the students to receive credit for the class and be able to print a completion certificate. To finalize a class:

1. Place a check next to each student in the Assign Credit? Column to indicate if they passed the course.
2. Click the Finalize button.

In the Enrollment section, there's an option to quickly enroll multiple users at a time.

1. Click the Class Roster Bulk Entry link.

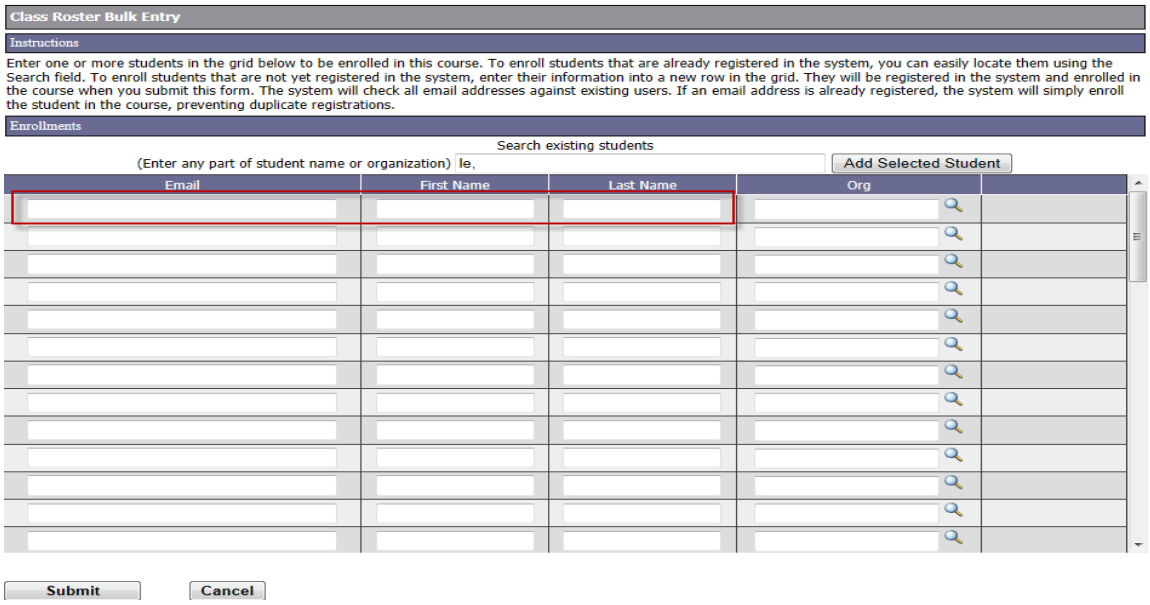
2. The Class Roster Bulk Entry will open displaying an area to search for existing students. Begin typing in the student's name or organization. A list will appear displaying student information similar to the information provided.



3. Select the correct student from the list.
4. Click the Add Selected Student button to the right of the Search Existing Students text box to add the student to the class roster.

Alternatively, an email address, first name, last name, and organization can be entered for users to enroll them in the class. The LMS will search for user accounts with a matching email address. If one is not found, a new account will be created. If one is found, then that account will be enrolled in the class. To perform this function:

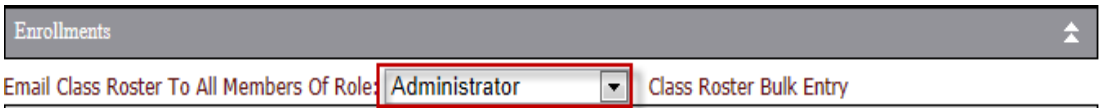
1. On the Class Roster Bulk Entry screen, enter in the student's Email, First Name, and Last Name.



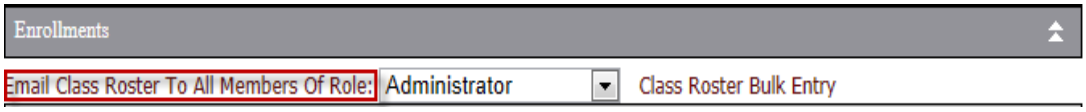
2. Click the Magnifying Glass icon to bring up the Organization tree, and select the organization that applies to the student.
3. Repeat the steps for the remaining students.
4. Click Submit.

The Class Roster for any Classroom Training can be emailed out to users with a specific role within the system. To email a class roster:

1. Select the Role from the Email Class Roster To All Members Of Role drop-down list.

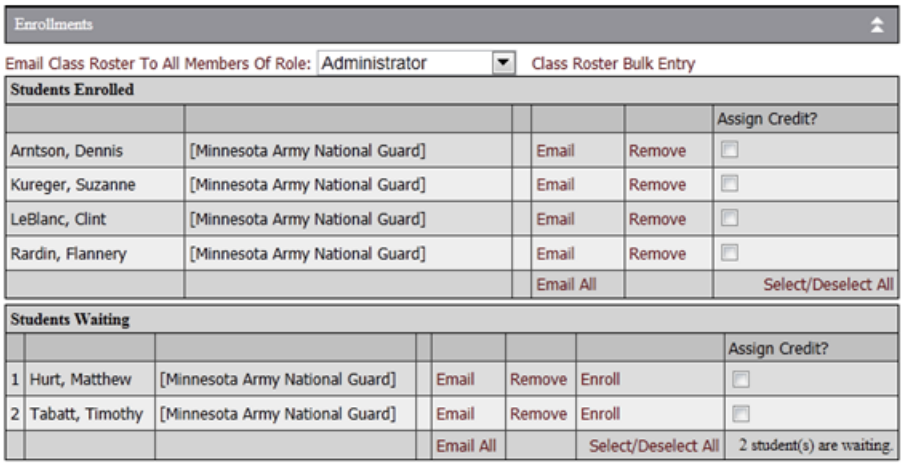


2. Click the Email Class Roster To All Members Of Role: link. This will email the roster to all users with the assigned role.



4.4.6.1 AUTO ENROLLMENT

If enabled, this feature will automatically enroll the first student on the waiting list when a student from the enrolled list is unenrolled.

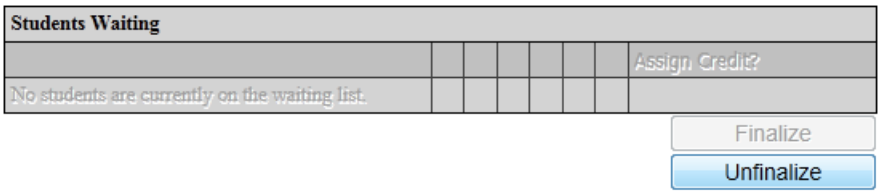


Once a student is automatically enrolled from the wait list, confirmation emails are sent to the newly enrolled student, the class/course instructor, and the class manager (if assigned).

Auto enrollment does not automatically enroll students on the waiting list when the maximum class size is increased.

4.4.7 Unfinalizing Classes

The ability to Unfinalize a class is restricted and may not be available depending on role assignments. If a class has been finalized, the Unfinalize button will appear within the Enrollments section, below where the Finalize button is located. Clicking the Unfinalize button will unlock the class and allow for changes. Be sure to Finalize the class once all changes are complete.

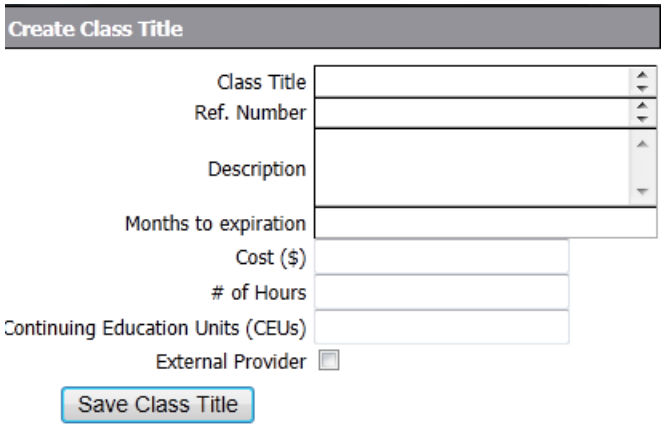


4.4.8 External Courses

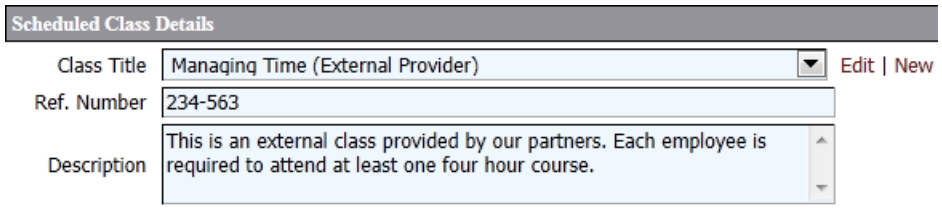
External courses are courses for which the LMS does not manage the schedule for. This is useful for tracking training that has occurred elsewhere.

To create an external course:

1. Open Classroom Training from the Administration menu (this can also be done on the Online Courses administration page).
2. Under Class Title select New. The Create Class Title window will appear.



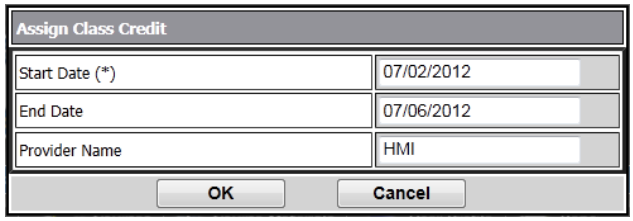
3. Enter the course information (see Creating Class Titles).
4. Click the "External Provider" check box.
5. Click Save Class Title.
6. The course is created, and is now available in the Class Title drop down menu. "(External Provider)" will appear next to the Class Title.

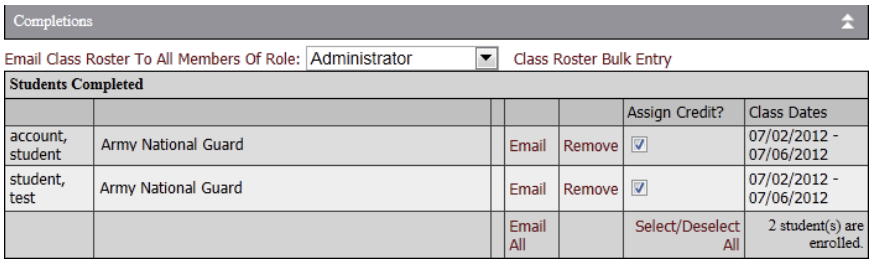


Once the external course has been created it will be displayed on the courses page. If a student attempts to register for the course, a pop-up message will appear instructing the student to see the description for enrollment information. Once the student has proven they've completed the course by providing their supervisor with a certificate or uploading it in their training plan, they can then be given credit through the Classroom Training or Online Course administration pages.

To give students credit for the course (from Classroom Training administration):

1. Select the Class Title from the drop down menu.
2. Scroll down to the Student Selection area and search for the student's name or create a new user then click the Assign Credit button.
3. The Assign Class Credit window will appear. Enter the Start Date (required), an End Date if applicable, and the Provider Name then click OK. The student will be assigned credit and will not appear under the Completions Section.





4.5 CONTACTS

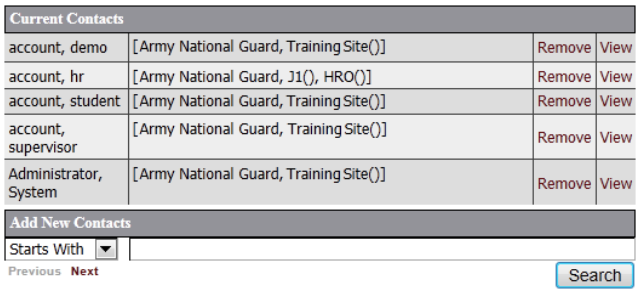
A contact is someone that receives an email listing users that belong to the specified organization that have expired or expiring training. The emails are sent on a monthly basis.

To specify a contact for an organization:

1. Select the desired organization from the tree on the left.
2. Search for users using the user search controls under Add New Contacts.
3. Place a check to each user that will be added to the contact list for the organization.
4. Click the Add button. The selected users will now appear in the Current Contacts section.

Contacts can be removed from the selected organization by clicking the Remove link next to their name in the Current Contacts section.

Clicking the View link next to the user in the Current Contacts section will open that user in the User administration page.



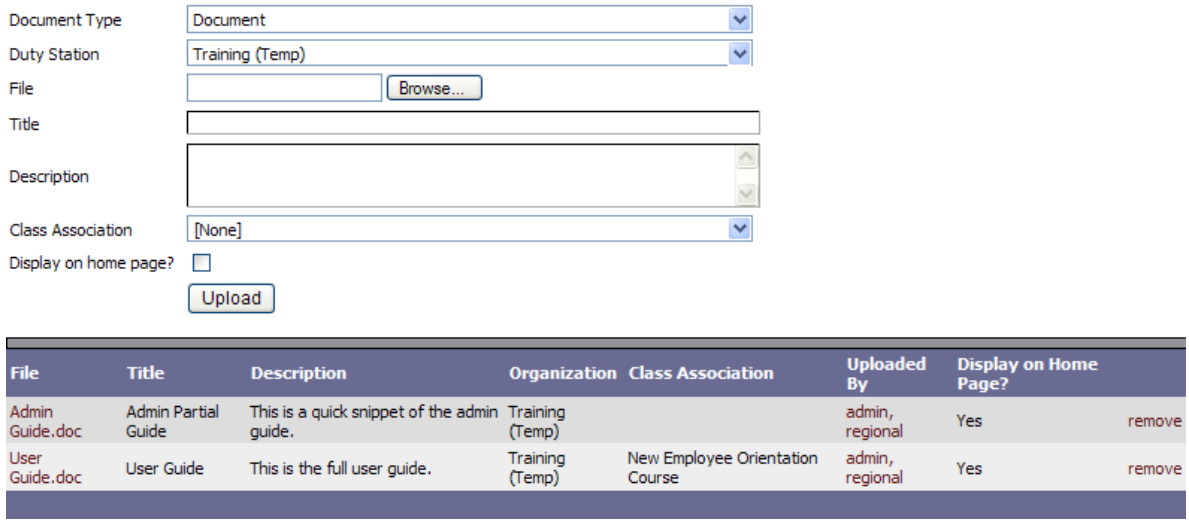
4.6 DOWNLOADS

The Downloads administration page can be used to upload files for users of the system to access. Files can be distributed to everyone in the system or only to those belonging to a particular organization or enrolled in a specific class. A document can also be set to display on the LMS home page within the Downloads section.

To upload a file:

1. Select the Document Type. In most cases, Document is the desired type.

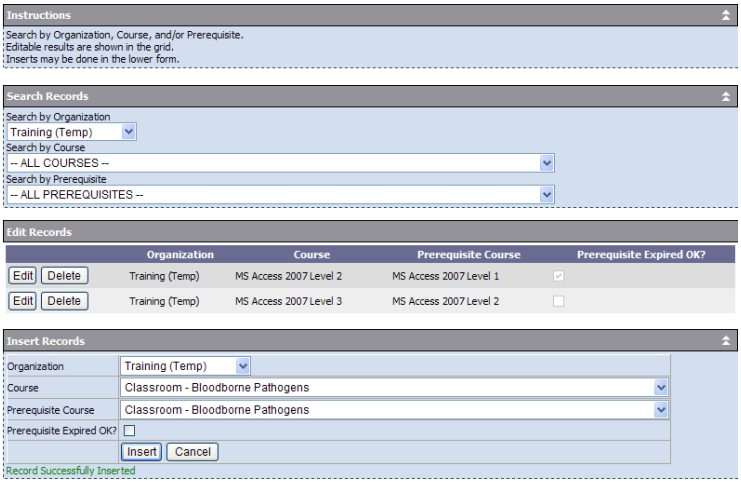
2. Select an Organization. The document will be restricted to users that belong to this organization. Select the top level organization to make the document viewable by everyone.
3. Click the browse button, select the desired file, then click Open. Then
4. Enter a title for the document. This field is required.
5. Enter a description of the document. This field is optional.
6. Select a class in the Class Association drop-down list if it is desired to restrict the document to users that are enrolled in the selected class.
7. Check the checkbox for "Display on home page?" if the document should appear on the home page in the downloads section.
8. Click upload to load the document into the LMS.



4.7 Course Prerequisites

Course Prerequisites can be added, edited, and removed as necessary. Prerequisites are communicated to the user via the Courses page but users are not restricted from taking a course if they have not completed the prerequisites.

The Instructions window is collapsed by default, but can be expanded by clicking on the title bar.



To create a prerequisite:

1. Click the Insert Records bar to expand the section if necessary.
2. Choose the Organization to which the prerequisite will apply. Select the top level organization for it to apply to all users.
3. Select the course to assign a prerequisite to using the Course drop-down list.
4. Select the prerequisite course using the Prerequisite Course drop-down list.
5. If Prerequisite Expired Ok? Is checked, then the prerequisite will be satisfied even if the course has expired for the user
6. Click the Insert button when finished. The message "Record Successfully Inserted" will appear in green.

To view existing course prerequisites the Search Records section can be used.

1. Click the Search Records bar to expand the section if necessary.
2. Select an organization to search by.
3. Use the Search By Course drop-down list to indicate a course to search for existing prerequisite rules. This can be left at "—All Courses –".
4. Use the Search By Prerequisite drop-down list to indicate a course to search for that is used as a prerequisite. "This can be left at "—All Prerequisites –".
5. The Edit Records section will list all prerequisite rules that match the search criteria. These rules can be edited or deleted by clicking the Edit or Delete buttons.

4.8 Create User

The Create User administration page allows administrators to create accounts for users. This can be useful for creating accounts when users are unable to access the system on their own. The same wizard will appear that is used for first time user registration. Simply complete the wizard to create an account.

4.9 Discussions

This page allows administrators to view all active Discussions in the system. This can provide useful feedback from the students taking the course. Once a student replies to the thread, the record will be visible for anyone taking the course to view.

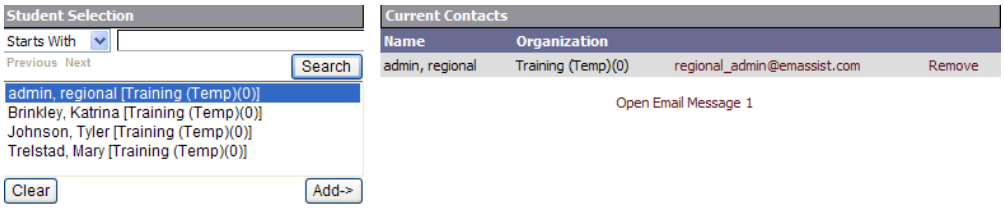
The other controls available on the Discussion page are:

- **Edit:** Selecting Edit allows the student to update their post to the thread.
- **Delete:** Selecting Delete will remove the record from the thread.
- **Reply:** Selecting Reply will allow students to add a record to the thread.
- **Flag:** Flagging a record will notify the System Administrator of the record.

4.10 Email Users

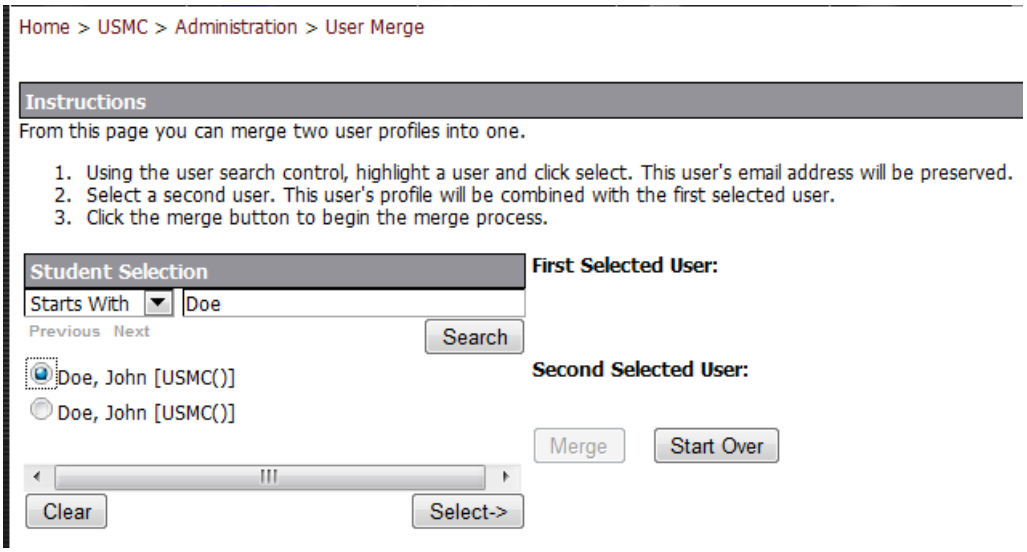
The Email Users administration page can be used to generate an email message to a group of users in the system.

1. Use the Student Selection tool on the left to select students to be included in the email message.
2. Click Add to add the selected students to the Current Contacts list.
3. Repeat steps 1-2 until all desired students are on the Current Contacts list.
4. Clicking the email address next to a student's name in the Current Contacts list will open a message window to that student only. Clicking the Remove link will remove the student from the list.
5. Click the Open Email Message 1 link to create an email message to the selected students. If more students are selected than can be included in one message, additional Open Email Message links will be displayed.



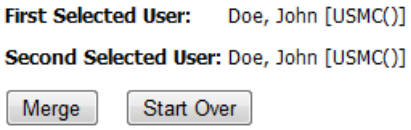
4.11 Merge Users

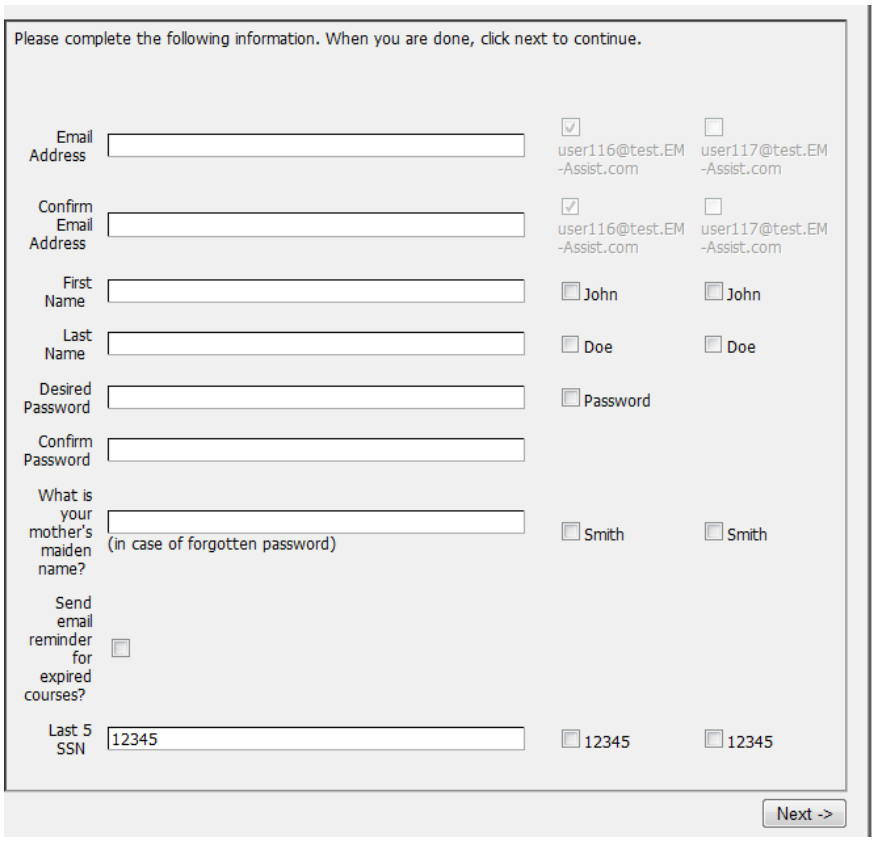
If a user ends up with multiple accounts, an administrator can merge the two accounts together. Merging two users together will result in one user account that uses the email address and password of the first selected account to merge.



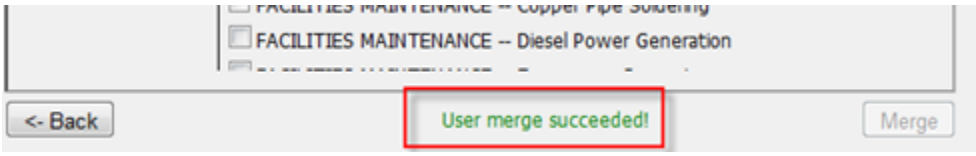
To merge a user:

1. Use the Student Selection tool to locate the first user account to merge. Click the Select button.
2. Use the Student Selection tool to locate the second user account.
3. The selected users will be identified to the right.
4. Click the Merge button. The User Profile wizard is opened.





5. Two additional columns are included in the wizard. The first additional column contains the values present in the first user account. The second additional column contains the information present in the second user account. Selecting the check box in either column will cause that information to be used in the merged account. Alternatively, a new value can be entered/selected.
6. Complete the wizard and click the Merge button to complete the merge.

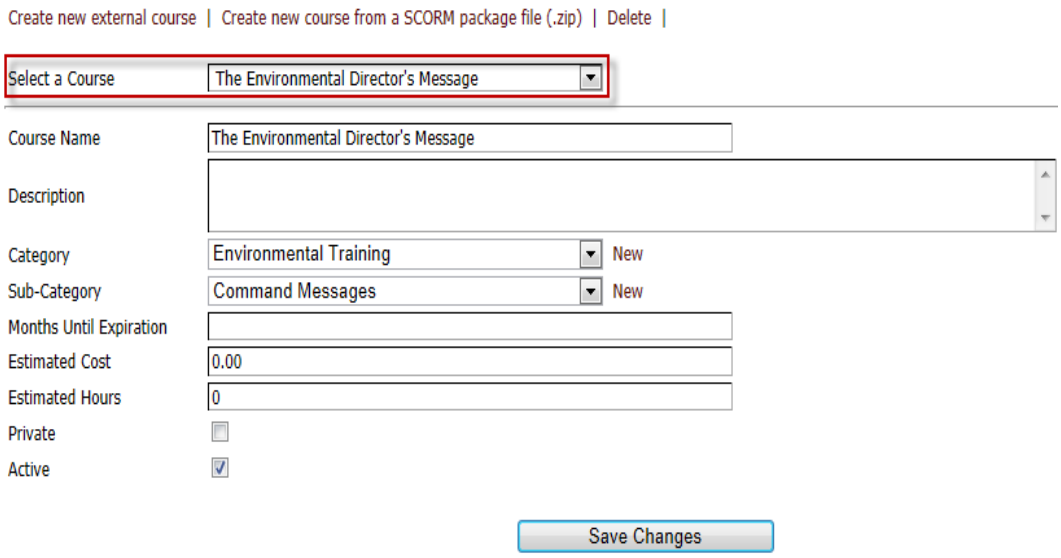


4.12 Online Courses

The Online Courses administration page allows administrators to update information for all of the Online courses in the system and give students credit for them.

To update properties of an Online Course:

1. Select an Online Course from the Select a Course drop-down list.



2. The following fields are available to edit:

- **Course Name:** Name of the Online Course.
- **Description:** Description of the Online Course.
- **Category:** Category of the Online Course.
- **Sub-Category:** Sub-Category of the Online Course.
- **Months Until Expiration:** Months until certificate expires once completed.
- **Estimated Cost:** Used for External Courses to provide cost of the course.
- **Estimated Hours:** Estimated time to complete the course.
- **Private:** If checked, the course is only available to certain users.
- **Active:** If checked, the course is available to students.

3. Click Saved Changes to save any changes made.

The Enter Certificate HTML section allows administrators to add additional information on the certificate for any given course. The information entered will display at the bottom of the certificate for the chosen course.

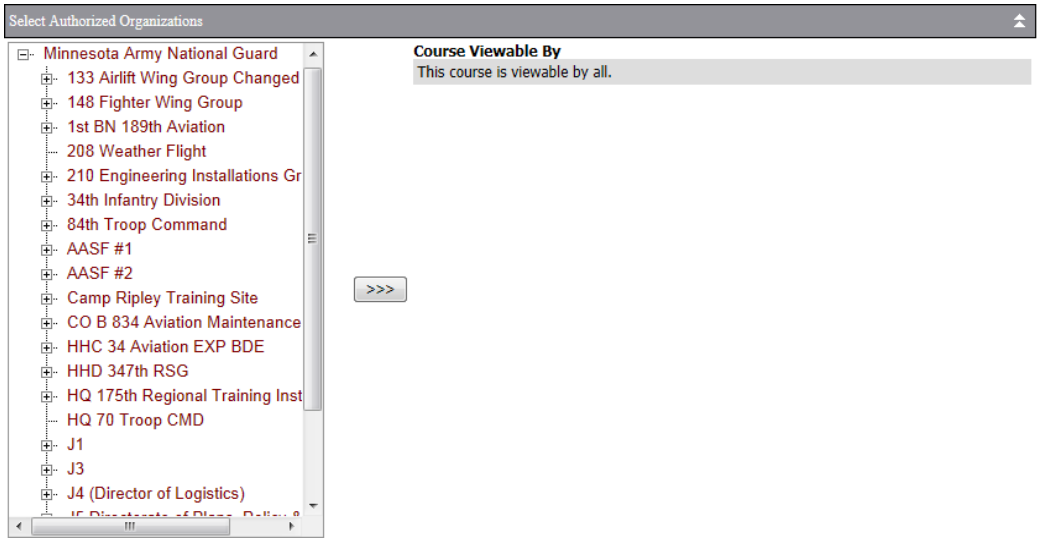
To add more information on the certificate:

1. Click the Certificate HTML bar to expand the section if necessary.
2. In the text window, enter text that will display on the completion certificate.
3. Click the Submit button to save the changes.

Any of the Online Courses in the system can be set to only be viewable by a user who is at a specified Organization.

To set an Online Course to only be viewable by users in a specified Organization:

1. Click the Select Authorized Organization bar to expand the section if necessary.



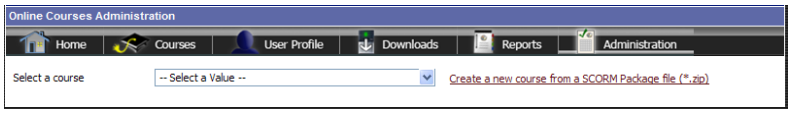
2. Select an Organization from the organization tree on the left side of the screen.
3. Click the “>>>” button to make the Online Course viewable only by students that belong to the selected organization.

The LMS also allows administrators manually assign credit to students for online courses. This feature is useful when a student completes the training course on CD.

To give students credit for an Online Course:

1. Click the Assign Course bar to expand the section if necessary.
2. Select the students from the Student Selection box.
3. Click on Assign Credit to give the students credit for the Online Course.

SCORM conformant packages can also be uploaded to create a new online course or update an existing one. This option may not be available depending on the LMS edition in use.



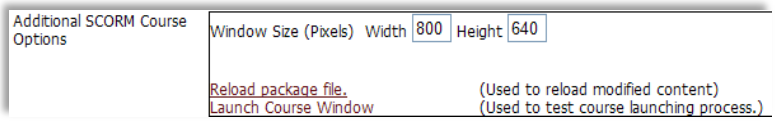
To upload a new SCORM course:

1. Select the link “Create a new course from a SCORM Package file”. The SCORM Upload Course window will appear.
2. Browse to the file you wish to upload and click open.

The file MUST be in .zip format or the upload will fail.

3. Once the file is selected, press the Upload button. Once the file is uploaded you will receive a confirmation window.
4. Close the window.
5. The new file is automatically named SCORM Upload with today's date and is placed as the current course. Make changes to the Title, Description, Category and Sub-Category as necessary.

    a. The Window Size (Pixels) refers to the size of the SCORM course as it loads. This is defaulted to 800x640. This can changed to any dimension you choose and should be set with knowledge of the courses requirements.



    b. If changes are made to the course at any time, it can be updated by using the Reload Package File link. This is used just like uploading a new file; however it will overwrite the current file.

    c. Launch Course Window can be used to verify the changes you have made. It will only reflect changes that have been saved.

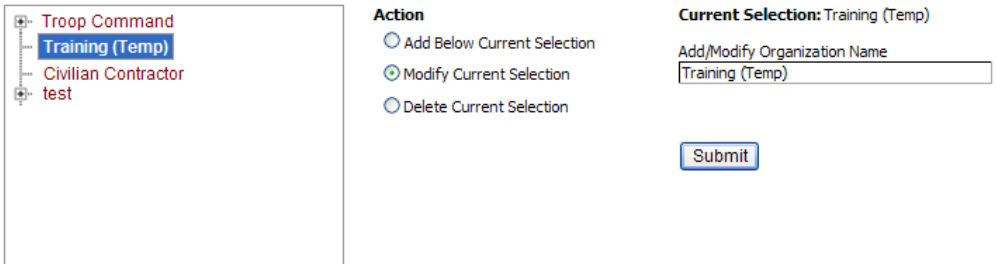
Remember to click the Save Changes button when you have finished updating your course information!

4.13 ORGANIZATIONS

The Organization administration page allows administrators to manage the organization tree. Available organizations will be restricted depending on the role of the user.

To add an Organization:

1. Select an Organization from the organization tree.
2. Select the Add Below Current Selection radio button and enter a name for the new organization.
3. Click the Submit button. The new organization appears below the originally selected organization.



To Rename an Organization:

1. Select an Organization from the organization tree.
2. Select the Modify Current Selection radio button.
3. Change the name in the Add/Modify Organization Name text box.
4. Click the Submit button. The organization will update to the new name.

To delete an Organization:

1. Select an Organization.
2. Select the Delete Current Selection radio button.
3. Click the Submit button.

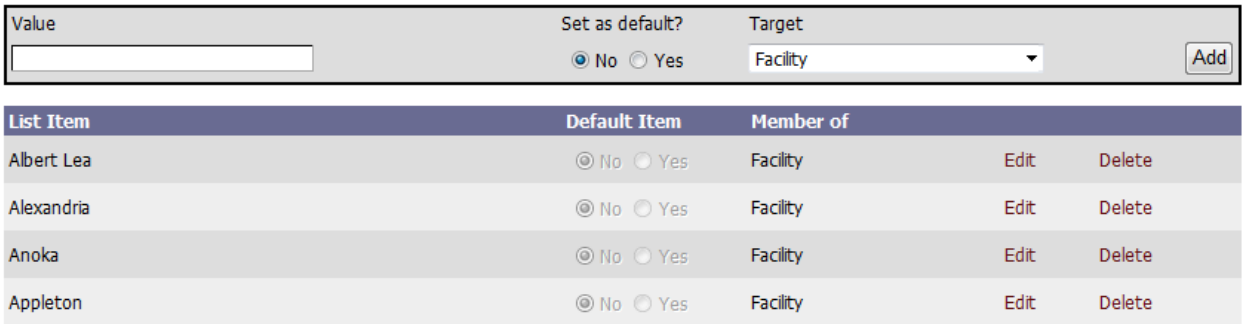
Deleting an organization will also delete any organizations below it.

4.14 Profile Lists

The Profile Lists administration pages allow administrators to manage the list of values that appear in the User Profile. When opened, the page first displays a table containing all user profile fields. If a field has the Training Criteria column checked it can be used on the Training Criteria page.

To manage a profile list:

1. Place a check in the Edit column to indicate which lists will be edited.
2. Click Submit and Sync. If multiple lists are selected, the synchronization process will identify values that are the same across the selected lists.
3. A table is displayed showing all available options in the selected lists.
    a. The List Item column contains the value of the list item.
    b. The Default Item column indicates if the list item will be selected by default for users. Only one item per list can be set as the default.
    c. The Member Of column indicates which lists the list item is contained in. These are the lists that will be updated if the list item is edited or deleted.



4. Click the Edit link to change a List Item. After making changes, click Update.
5. Click the Delete link to remove a List Item.
6. The box above the List Item table can be used to add a new value. To do so:
    a. Enter a value into the Value text box.
    b. Select No or Yes to indicate if the item will be the default value of the list.
    c. Select the list to add the new value using the Target drop-down list.
    d. Click Add.

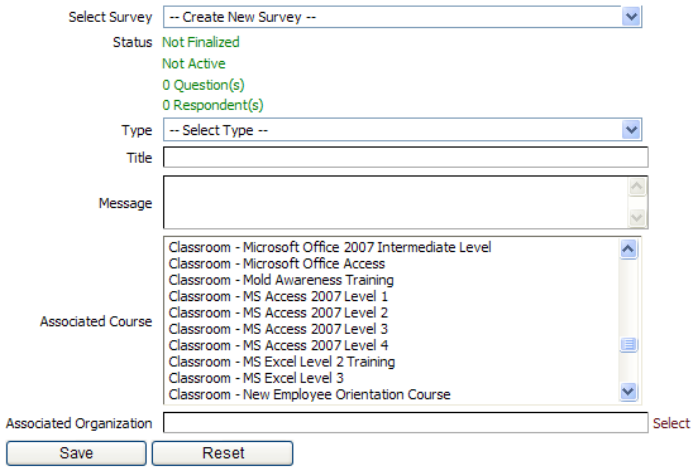
4.15 SURVEYS

Surveys can be created by Administrators to be displayed or emailed after an online course or classroom course. Multiple surveys can be made available; however, only one survey will be prompted at the end of an online course.

To create a new Survey:

1. Click on the Survey link on the Administration tab. The following fields will are available.

    - **Select Survey:** The drop-down list will display all surveys ever created.
    - **Type:** Type of survey.
    - **Title:** Title of the survey.
    - **Message:** Message that will display to the students before taking the survey.
    - **Associated Course:** Courses the survey will display for.
    - **Associated Organization:** The Organization the survey is for.



2. Click the Save button to save the Survey.

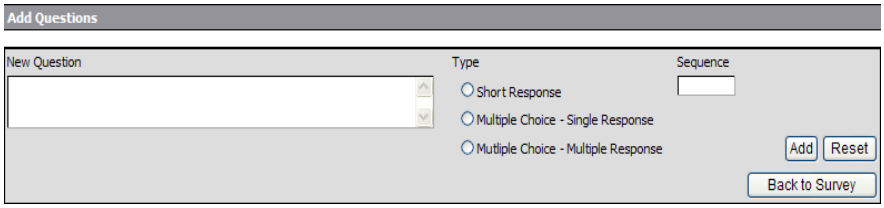
After the Survey has been saved, the option to add questions to the Survey will be available.

To add questions to the Survey:

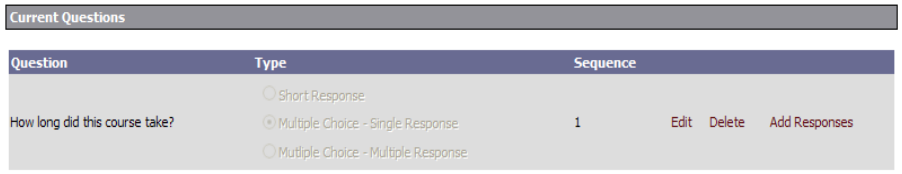
1. Click the Add Questions button.
2. Enter the question in the New Question field.
3. Choose the type of question.

    - Short Response. allows the student to enter their own response to the question.
    - Multiple Choice. Single Response creates a multiple choice question that will allow only one selection.
    - Multiple Choice. Multiple Response allows multiple selections.

4. Optionally enter a number into the Sequence box. This controls the order in which the questions are sorted. If no number is entered, they will be sorted alphabetically.
5. Click the Add button to create the question.



6. The question is now added to the Current Questions list. Options are available to Edit, Delete, and Add Responses.



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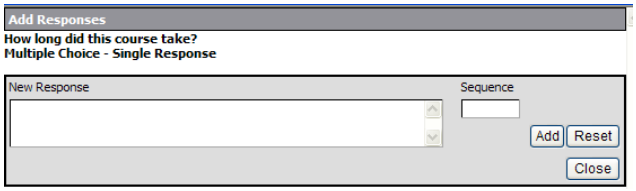
Once a question has been added to the Survey, the responses that the students will see for the questions need to be created.

To add responses to the Survey Question:

1. Click the Add responses link.
2. The Add Responses window will appear. Enter the response and press the add button.

Continue until all the responses are added. Once added, they can be edited and deleted as necessary.

3. Click the Close button when all changes are complete.



Once all the questions and responses have been entered, the survey needs to be finalized.

To Finalize a Survey:

1. Click the Back to Survey button.
2. The Finalize button is now active on the page. Clicking the Finalize button will apply the Survey to the selected course(s).

Once a Survey is Finalized, the administrator will have the option to either UnFinalize the survey or Delete it. UnFinalizing the Survey allows the administrator to edit any of the information for the Survey. The Delete option allows the administrator to Delete the Survey out of the system.

To UnFinalize a Survey:

1. Click the UnFinalize button.
2. The options at the bottom of the page will allow the administrator to Edit the responses on the survey.

To Delete a Survey:

1. Click the Delete button.

4.16 Training Criteria

The Training Criteria administration page is used to establish course requirements based on selections in the User Profile.

To demonstrate how this works consider the following example. When a user registers for the LMS, they are asked to indicate their job title. The user selects Environmental Coordinator. Because of a training criteria rule, the LMS indicates that the Environmental Awareness course is required for that user.

Training criteria rules can be established by using any of the three page modes found in the Training Criteria administration page. Certain page modes may not be available depending on role assignments.

How to use the Courses page mode:

1. Select the Courses radio button in the Page Mode radio button list.

2. Select the course to which the training criteria rule will apply by selecting it in the Course drop-down list.
3. Select the criteria list from the Criteria list box. The options that appear here are the user profile lists that were designated as training criteria on the Profile Lists administration page. Multiple lists can be selected by using CTRL + click.
4. Click submit.
5. A list is displayed showing all of the items contained within each criteria list. Check either Required, Recommended, or Not Required for an item to create a training criteria rule. The rule established will determine if the course is Required, Recommended, or Not Required for any users that select the criterion in their user profile.
6. Click Update.

How to use the Criteria page mode:

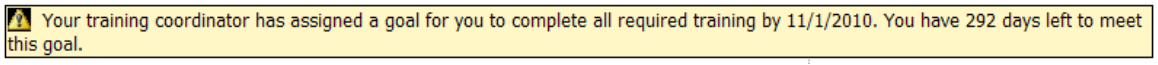
1. Select the Criteria radio button in the Page Mode radio button list.
2. Select the criteria list from the Criteria List drop-down on the left. The options that appear here are the user profile lists that were designated as training criteria on the Profile Lists administration page.
3. Select an item in the Criterion list below the Criteria List on the left.
    a. A second criteria can also be selected using the duplicate set of controls on the right. If a criterion is selected, then the user must select both criterion in their user profile in order for the rule to apply.
4. Click Submit.
5. A list is displayed showing all of the courses available in the LMS. Check either Required, Recommended, or Not Required for an item to create a training criteria rule. The rule established will determine if the course is Required, Recommended, or Not Required for any users that select the criterion in their user profile.
6. Click Update.

How to use the Organizations page mode:

1. Select the Organizations radio button in the Page Mode radio button list.
2. Select an organization from the tree.
3. Optionally select a criterion from the controls on the right. If a criterion is selected, then the user must be a member of the selected organization and have selected the criterion in their user profile in order for the rule to apply.
4. Click Submit.
5. A list is displayed showing all of the courses available in the LMS. Check either Required, Recommended, or Not Required for an item to create a training criteria rule. The rule established will determine if the course is Required, Recommended, or Not Required for any users that belongs to the specified organization.

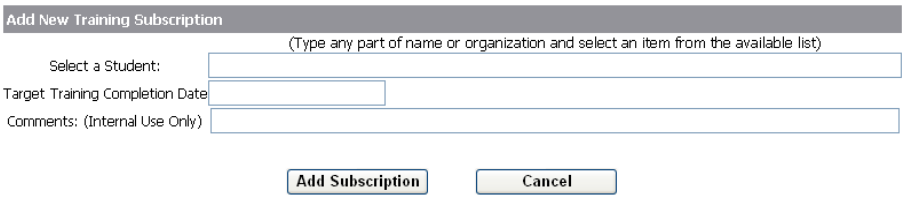
4.17 Training Subscriptions

Training subscriptions are assigned to individual students and result in periodic email reminders and home page reminders, encouraging the student to complete their required training courses.



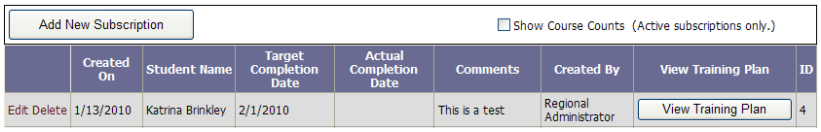
To create a training subscription:

1. Click the Add New Subscription button.
2. Enter part of the student's name. The LMS will find corresponding names and offer a selection.



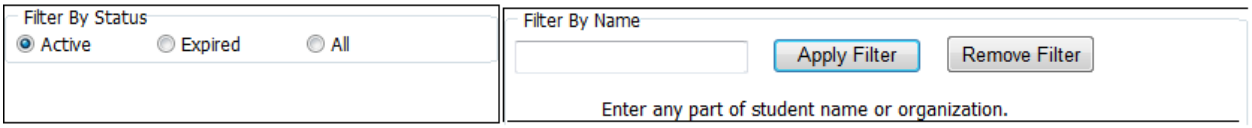
3. Select the correct name.
4. Specify a Target Training Completion Date.
5. Optionally enter any comments. The comments are internal only, and will never be shown to a student.
6. Click the Add Subscription button.

The subscription will appear on the main page and can be edited or deleted. Clicking View Training Plan will show the courses that are required for the student.



The list of training subscriptions can also be searched and filtered. By using the Filter By Status and Filter By Name tools.

To filter by status, simply change the selection between Active, Expired, or All. To filter by name, type in any part of the students name or organization and click Apply Filter. Clicking Remove Filter will clear the filter.



4.18 UIC & Training Totals

The UIC & Training Totals page allows administrators to designate a Unit Identification Code (UIC) for any organization in the LMS. The page can also be used to specify the number of people assigned to an organization for a specified quarter.

1. Select an organization from the tree on the left.
2. Type in a UIC Number if desired.
3. Select the year to update the number of people assigned for.
4. If Desired, update the number of people assigned to the unit for each quarter of that year (calendar year). These are the numbers used by the Training Totals report.
5. Click Submit.

4.19 Unknown Organizations

The Unknown Organization page will display records of Organizations that users currently have assigned to their User Profile that aren't recognized in the system. This is when the user enters in there own Organization after selecting "other" on one of the level in the Organizaiton page in the User Profile. Administrators can view the entered Organization and either ignore the entry or edit the users' profile to display the correct Organization that's available in the LMS.

To manage the Unknow Organization list:

1. Review the Organization under the Other Organization column.
2. Click Ignore to leave the user profile how it is.
3. Click Edit to view the User Profile and update the Organization.

First Name	Last Name	Other Organization	Selected Organization	User ID	Delete	Edit
luis	aboytes	1st Reconnaissance Battalion	USMC(), MCAS Camp Pendleton(0), MCIWEST(), MCAS Camp Pendleton ()	10436	Ignore	Edit
Heron	Agueroaguilar	MWSS 374	USMC(), MCAGCC Twentynine Palms()	10897	Ignore	Edit
DAVID	ALFARO	LANDING SUPPORT COMPANY	USMC(), MCB Camp Pendleton(M33200), 1st Marine Logistics Group (1MLG)(), Combat Logistics Regiment 17/CLR17()	11200	Ignore	Edit
Anthony	Alvarado	Mechanic	USMC(), MCB Camp Pendleton(M33200), 1st Marine Logistics Group (1MLG)(), Combat Logistics Regiment 17/CLR17()	11196	Ignore	Edit
David	Alvarado	MTM	USMC(), MCB Camp Pendleton(M33200), 1st Marine Logistics Group (1MLG)(), Combat Logistics Regiment 15(), 1st Maintenance Battalion()	10864	Ignore	Edit
Kevin	Ashley	15th MEU	USMC(), MCAS Camp Pendleton(0)	10507	Ignore	Edit
mark	atwood	Hazardous Waste Branch	USMC(), MCB Camp Pendleton(M33200), AC/S Environmental Security(), Environmental Compliance Department(), Inspection and Compliance Division()	9912	Ignore	Edit

4.20 Users

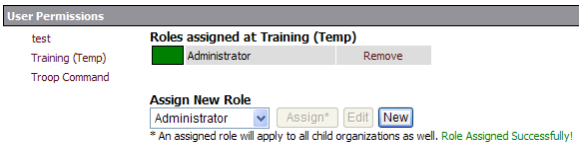
The Users administration page allows administrators to view, update, and delete users from the system. It is also used to create and assign roles.

To view, update, or delete a user:

1. Use the Student Selection tool to select a user and then click Edit.
2. The user profile for the selected user is displayed.
3. To delete the user, click the Delete button.
4. To login as the user, click the Login as Selected User button below the user profile.
5. To update the user, simply change values in the user profile wizard and then click the Update button (located on the last page of the user profile wizard).

To assign a role to a user:

1. Use the Student Selection tool to select a user and then click Edit. The User Permissions section will appear below the user profile.



2. Select the organization at which the role will be assigned. The user will only be able to access user data for users belonging to the selected organization (including organizations below it).

3. Select the desired role from the Assign New Role drop down list.

4. Click Assign.

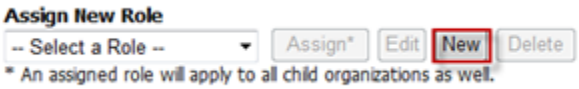
If the user already has a role, it will be displayed above the Assign new Role. Click the Remove button to remove the role.

The available roles will depend upon the LMS configuration.

Administrators have the ability to Create new roles and edit existing roles.

To Create a new Role:

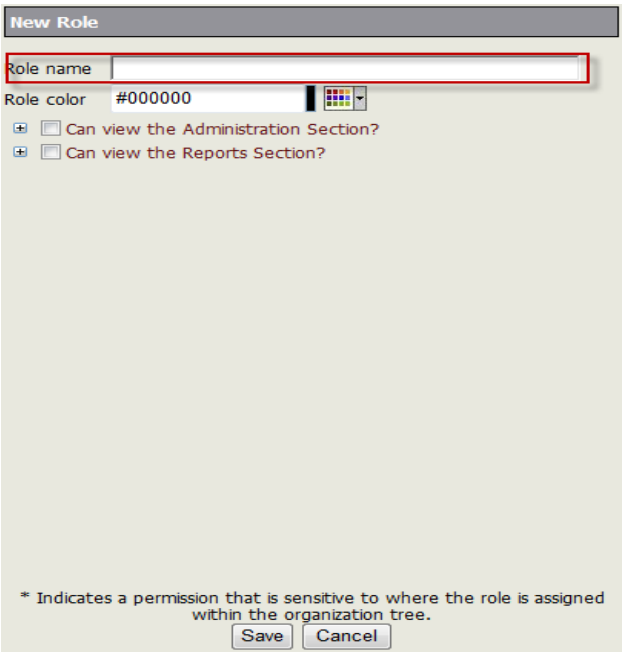
1. Click the New button. This option may not be available depending on your role.



2. Choose a name for the new role and select a color. The color of the role will color code the organization tree to help find the organizations at which the user has roles assigned.

3. Select the permissions that will be granted to users assigned the role. Hovering the mouse cursor over the permission will give a brief description.
4. Click Save.

To Edit a role, simply select the desired role from the Assign New Role drop-down list and click Edit. The interface for editing a role is the same as creating a new role.

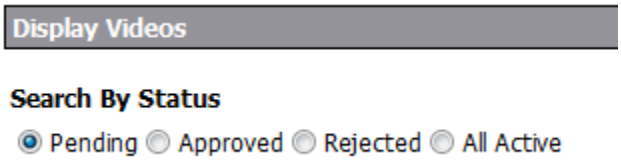


4.21 VIDEOS

The Videos page allows administrators to manage all videos submitted through the courses page. Administrators have the ability to approve, reject, or edit any of the videos in the system.

To use the Videos page:

1. Choose the status from the Search By Status section.
   - **Pending:** The video status is pending.
   - **Approved:** The video has been approved.
   - **Rejected:** The video has been denied.
   - **All Active:** All videos that are either Pending or Approved.



2. Click Edit next to the video.

Videos

		Title	Description	Submit Date	Create Discussion	Status	
Edit Delete	Add Comments	Test Butterfly	Butterfly	10/3/2012 1:30:50 PM	☑	Pending	Play Video

3. After clicking on Edit, the section will change allowing the Title and Description of the video to be updated.

Videos

	Title	Description	Submit Date	Create Discussion	Status	
Update Cancel	Test Butterfly	Butterfly	10/3/2012 1:30:50 PM	☑	◉ Pending ○ Approved ○ Rejected	Play Video

4. Click on the Create Discussion check box to create a discussion for the video.
5. Choose the Status of the video.
6. Click Play Video to launch the video.
7. Click Update to save the change or Click Cancel to cancel all the changes.

To Add a comment to the video:

1. Click the Add Comment link.
2. A new section will appear with a text box under the Comments column.

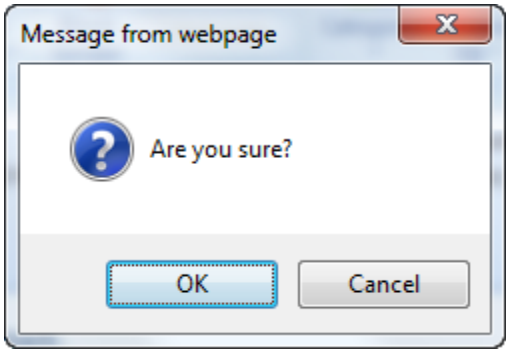
Comments for "Test Butterfly"

	Date	User	Comment
Insert Clear		Super Administrator	

3. Enter the Comment into the text area.
4. Click Insert to add the comment.
5. Click Clear to clear out any information entered.

To Delete a video:

1. Click the Delete link next to the video.
2. A pop-up box will display to confirm the delete.



3. Click Okay to delete the video from the system.
4. Click Cancel to keep the video.