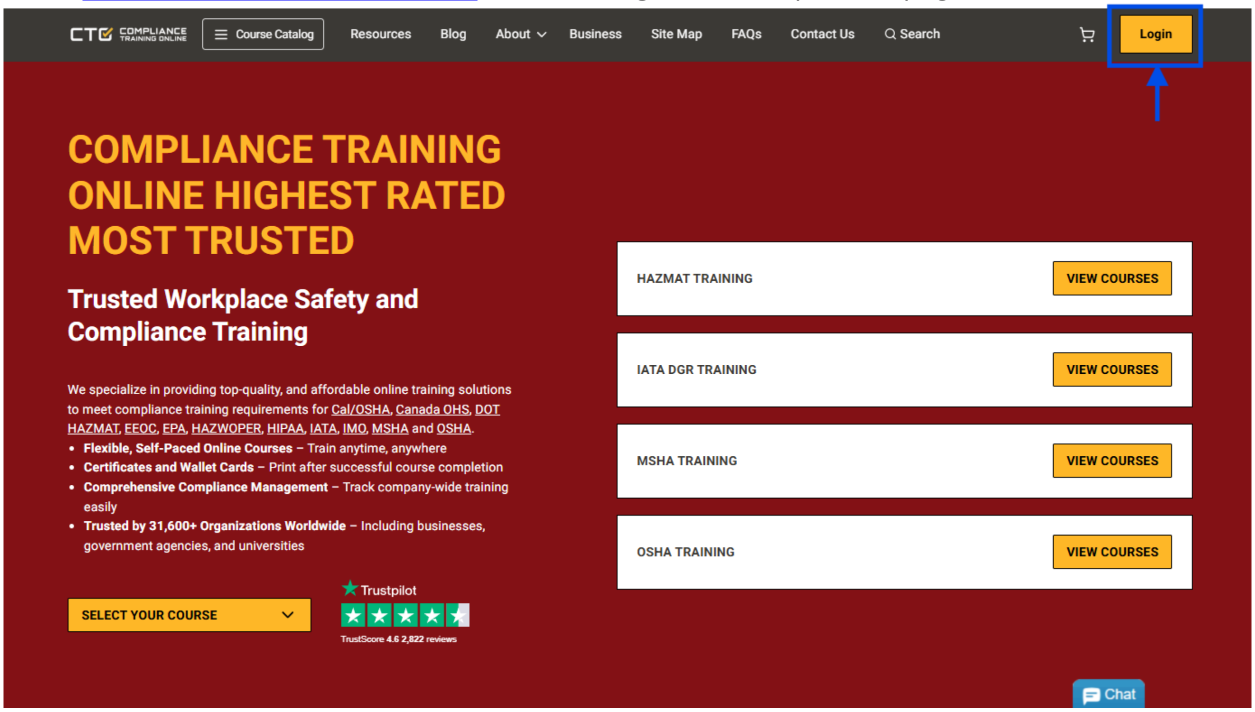
Compliance Training Online (CTO) Platform

Manager-Level Access User Guide

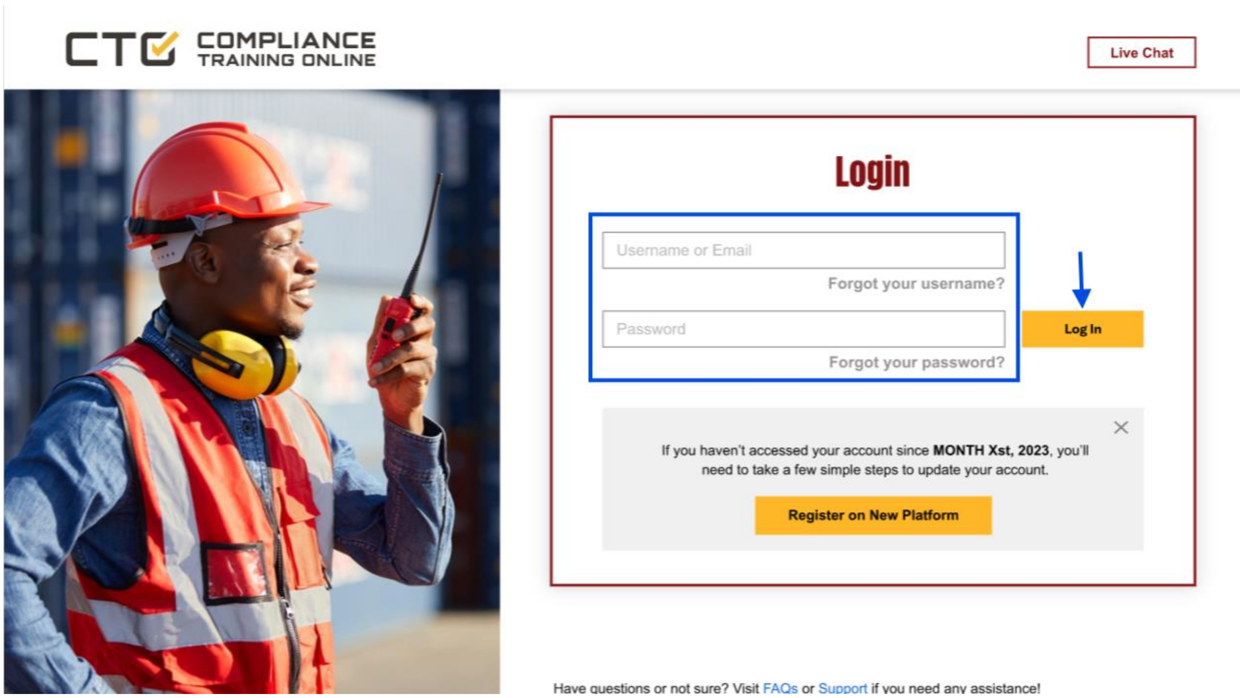
This document will guide you through the features and benefits available with FULL MANAGER ACCESS.

- **Manage User**
- **Add User: Batch Import**
- **Manage Organization Group**
- **Manage User Groups**
- **Plan & Enroll**
- **Reports**
- **Manage Security Roles**
- **Assign Security Roles**
- **Manage Enrollments**

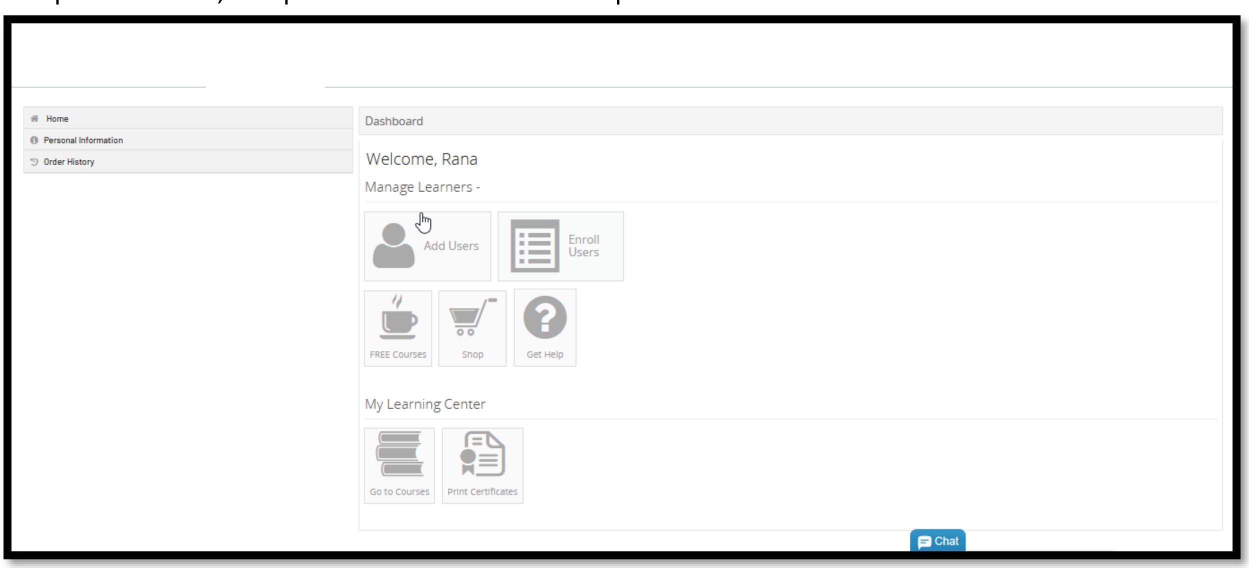
STEP 1
LOGIN
Go to compliancetrainingonline.com and click **Login** at the top of the page.



Enter your Email Address and Password, then click Login.

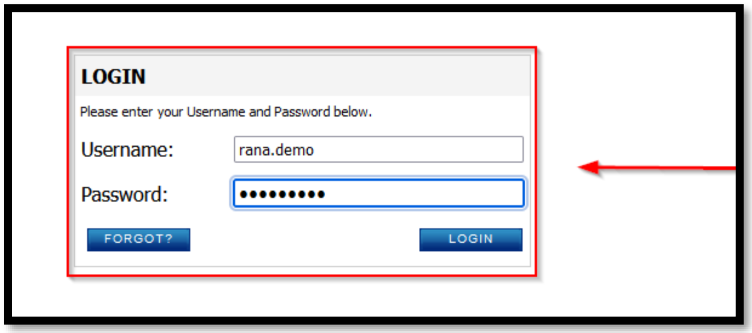


STEP 2
VIEW YOUR DASHBOARD (Desktop View)
Once you have logged in with your credentials, you will see your dashboard. Once you select ADD USERS or ENROLL USERS, you will be taken to the manager view of the training platform to access reports, change user profile details, and print or download user completion cards and certificates.

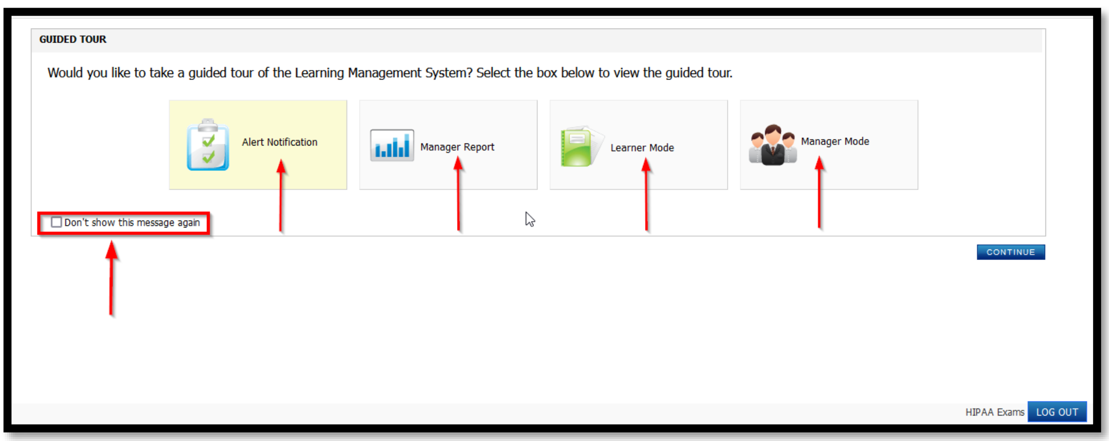


OR

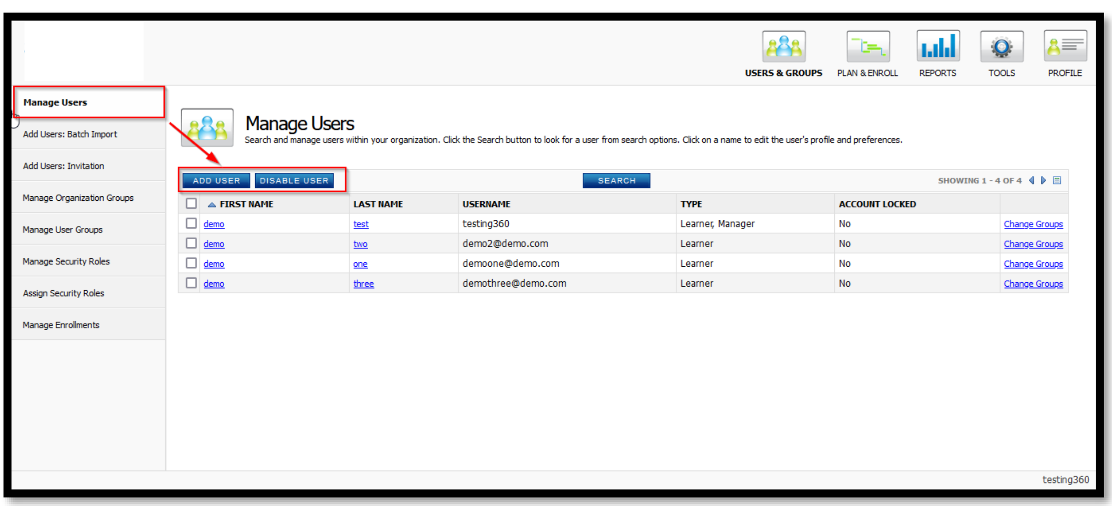
You can also login through https://lms.360training.com/lms/login.do
Enter your Username and Password, then click LOGIN.



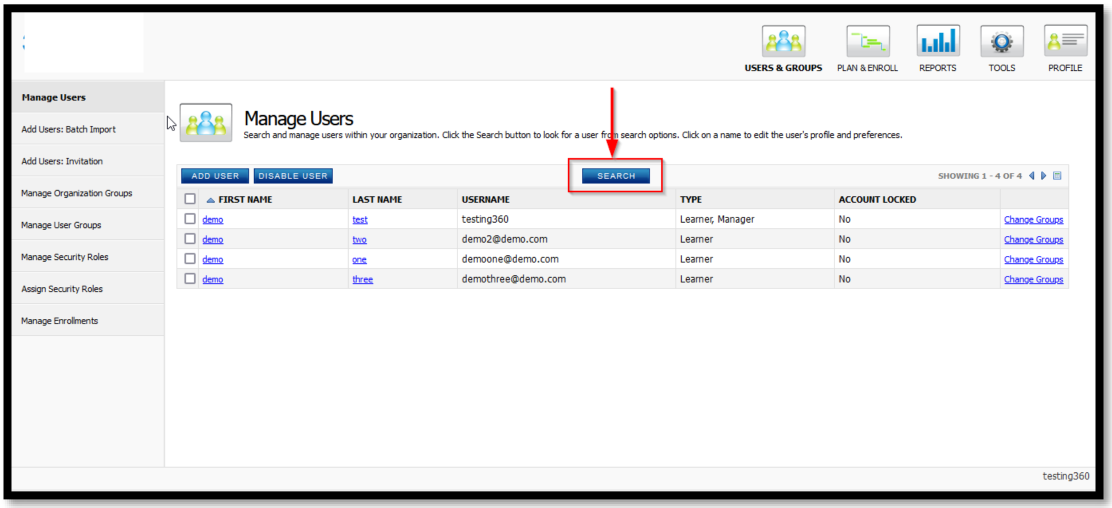
STEP 3
GUIDED TOUR
You may choose to step through tutorials or click CONTINUE.



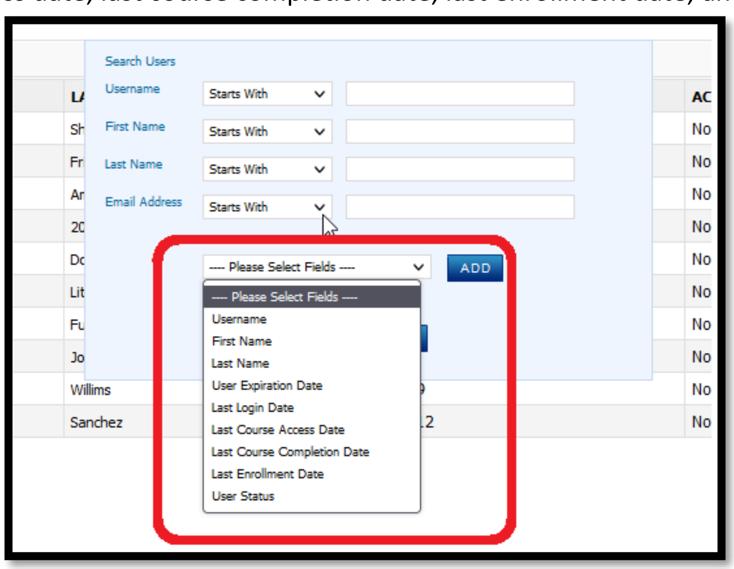
STEP 4
MANAGE USERS
You can navigate to this page by clicking ENROLL USERS or ADD USERS on desktop, or ASSIGN SEATS on mobile, or after logging into the training platform. Select ADD USERS to view the profile details of the learner.



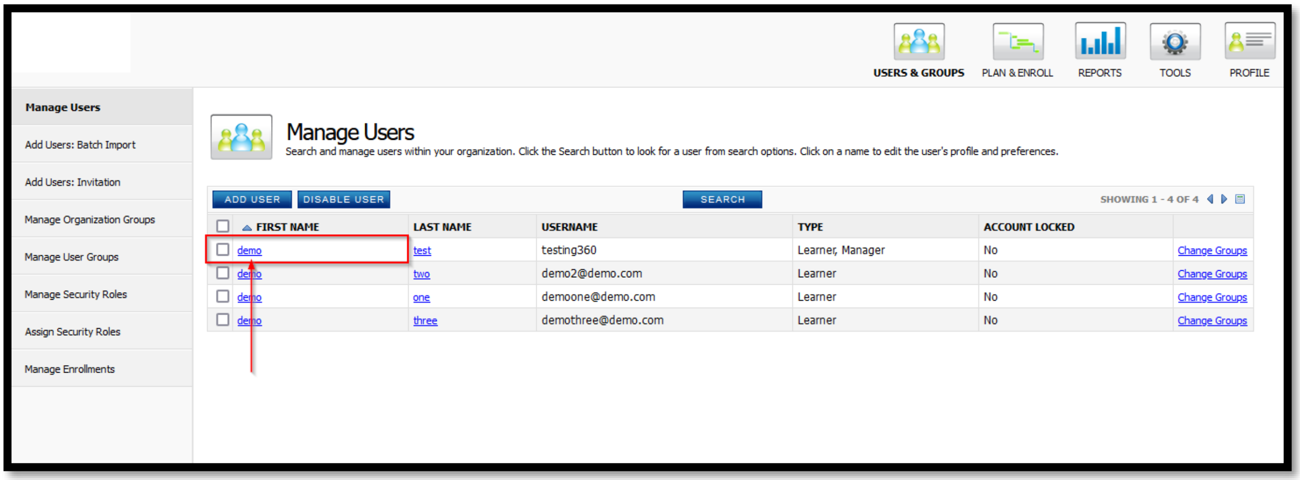
Click the SEARCH button to search by username, first name, last name, or email address.



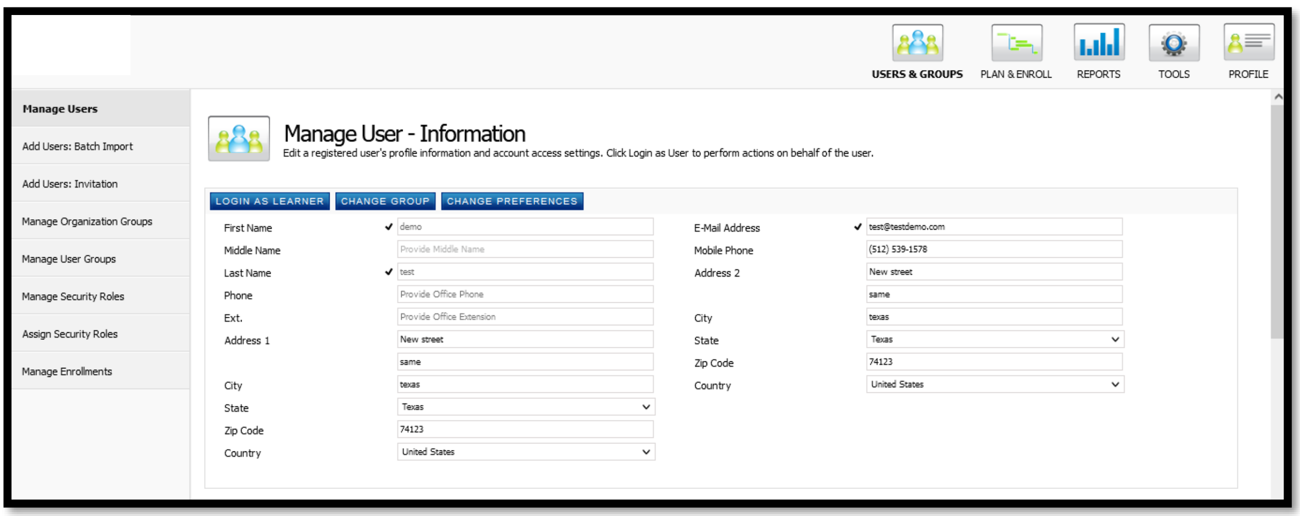
To select additional search options or fields, click ADD for fields such as user expiration date, last login date, last course access date, last course completion date, last enrollment date, and user status.



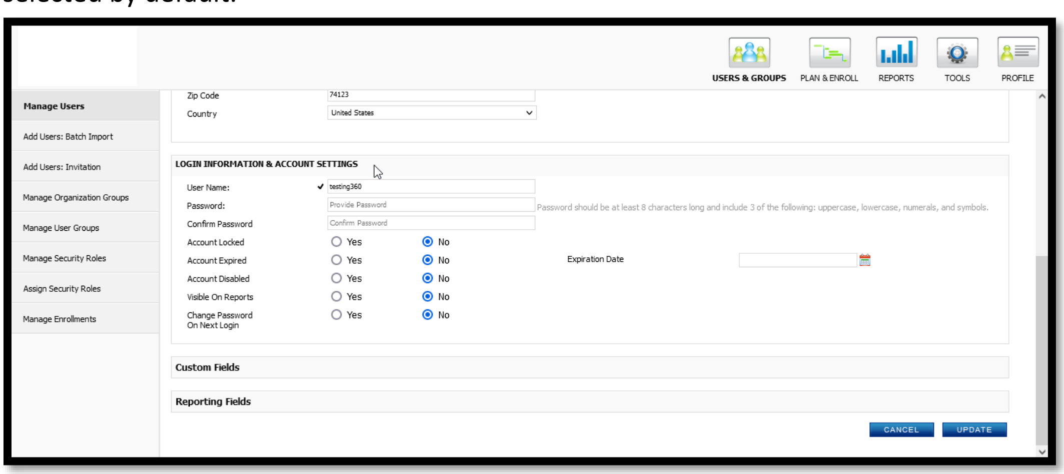
Click the first name of a user to view their user details.



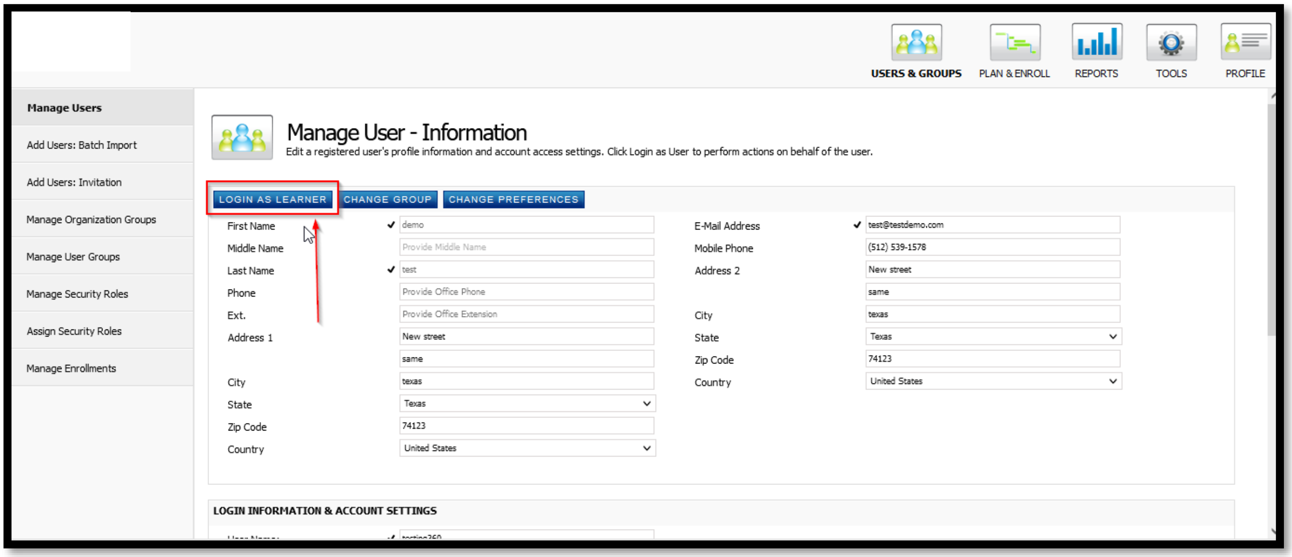
This opens the user profile page.
NOTE: You can edit all user details, including password, except for username.



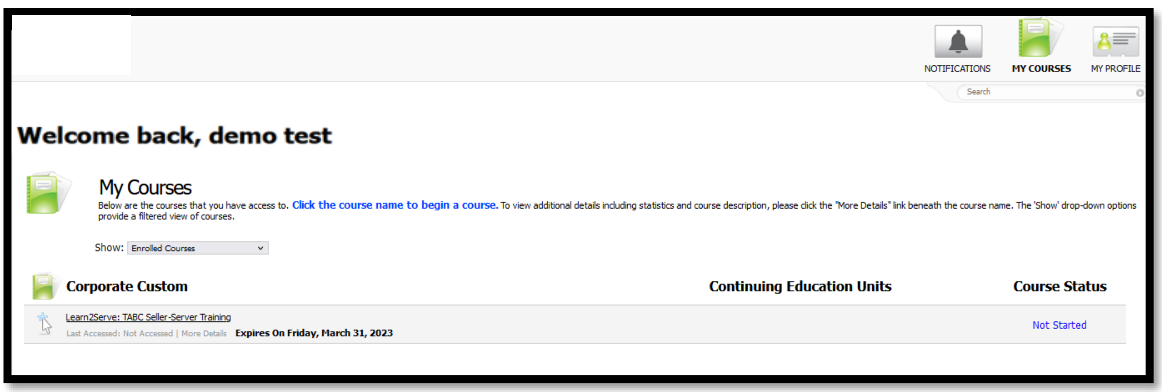
You also have the option to lock, expire or disable a user account by clicking the YES or NO option.
* NO is selected by default.



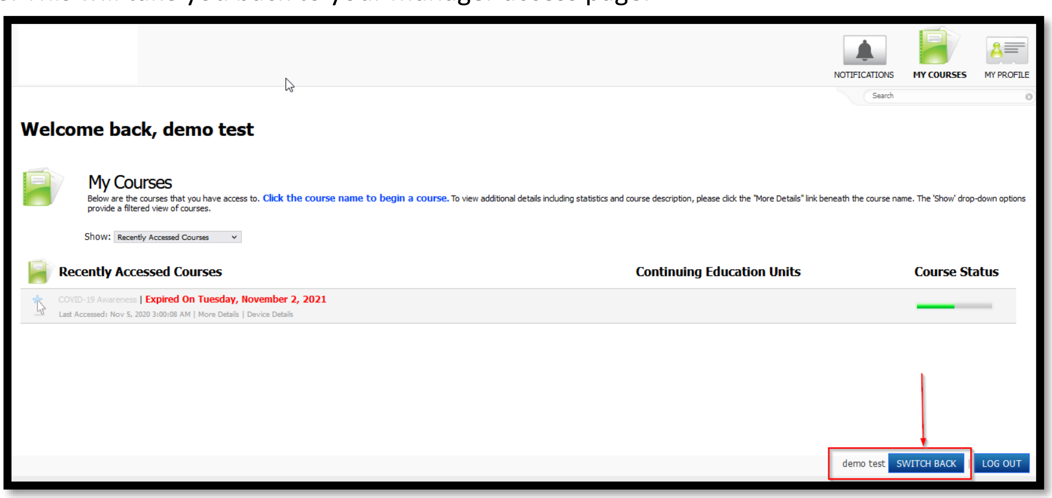
Click the LOGIN AS LEARNER button to access course completion records.



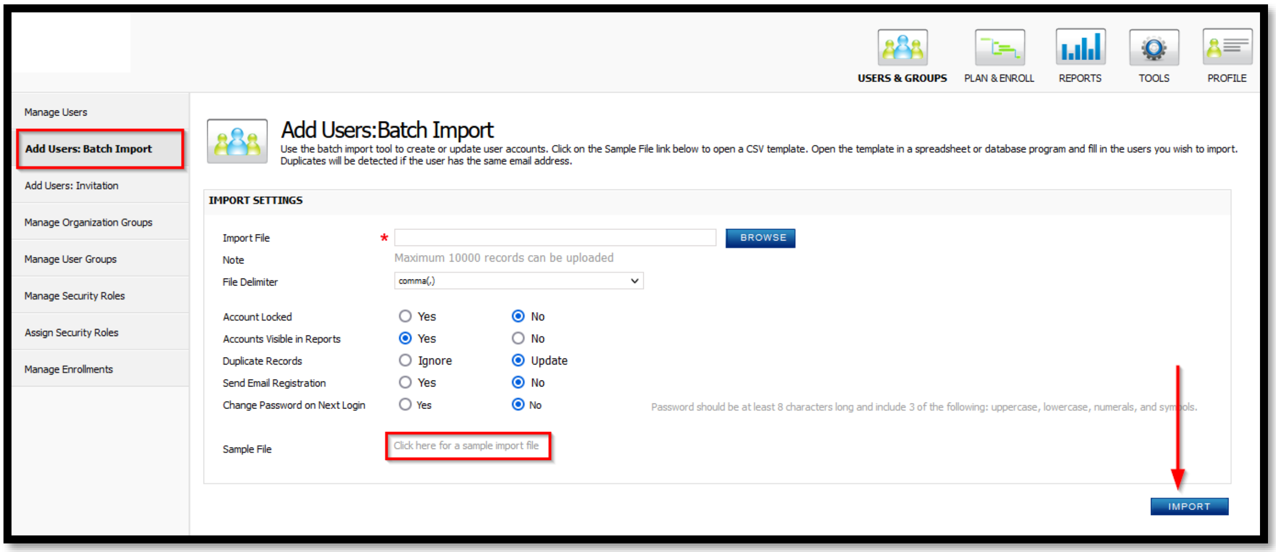
In this view, you will see the user's list of Enrolled Courses. To access the certificate of completion for a course, click PRINT CERTIFICATE.



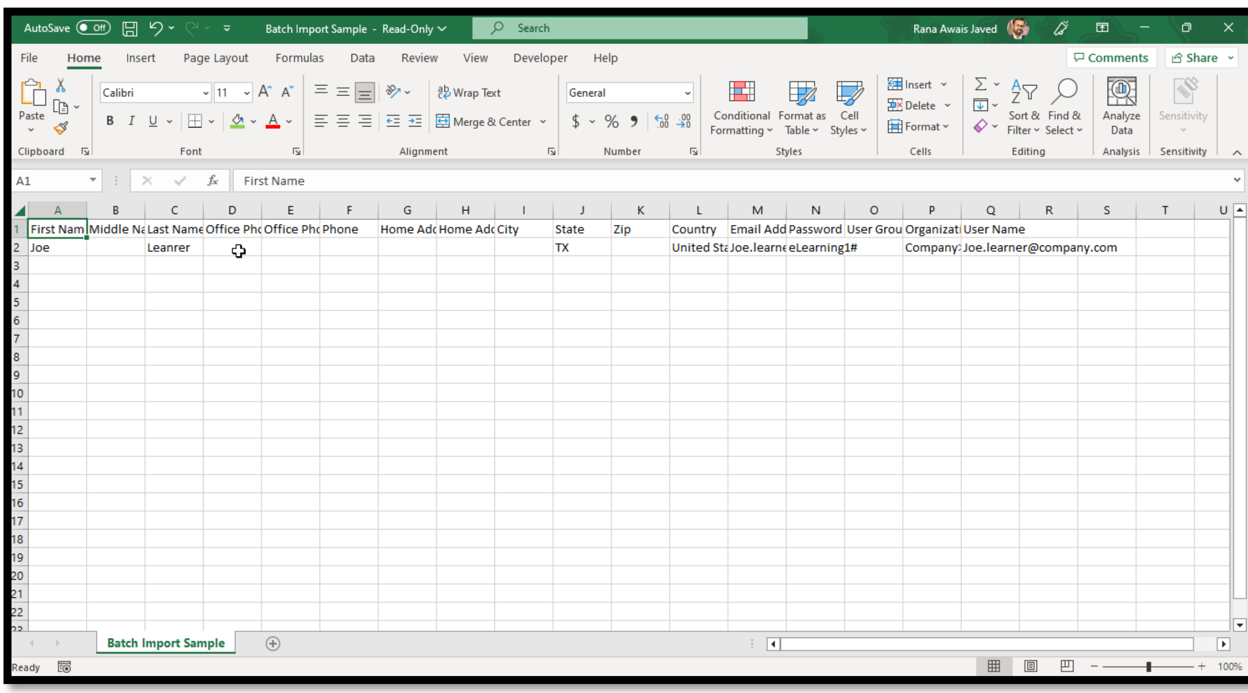
To leave the LOGIN AS LEARNER view, click the SWITCH BACK button at the bottom right-hand corner of the page. This will take you back to your manager access page.



STEP 5
USER BATCH IMPORT
Use the batch import tool to create or update user accounts in bulk.
Click the SAMPLE FILE link at the bottom of the page to open the CSV template in a spreadsheet or database program, then fill in the users you wish to import. Duplicates will be detected if the user has the same username.

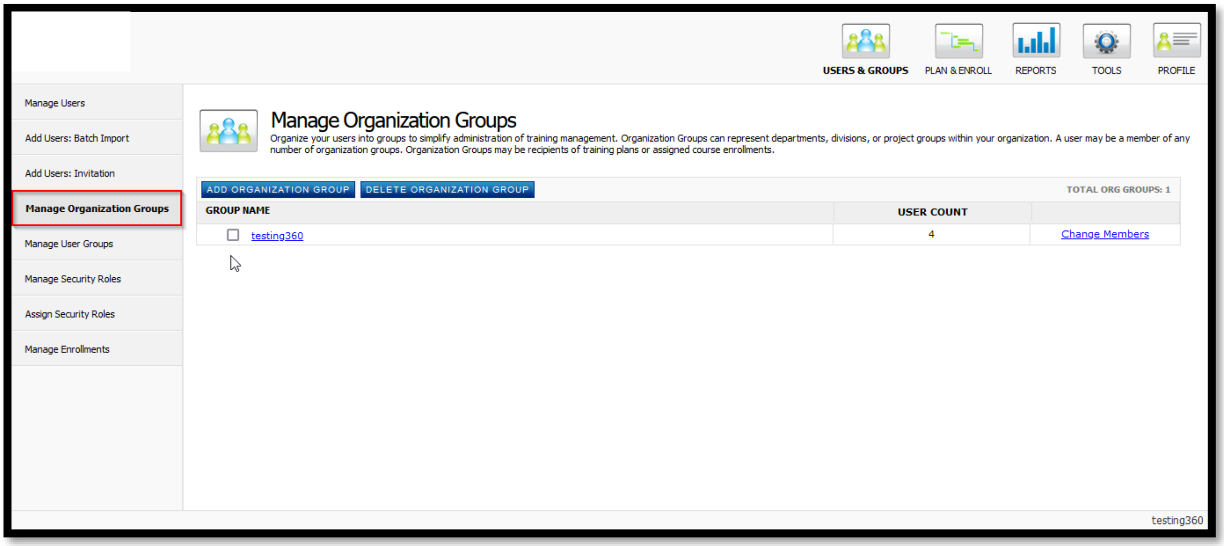


Sample Import file view

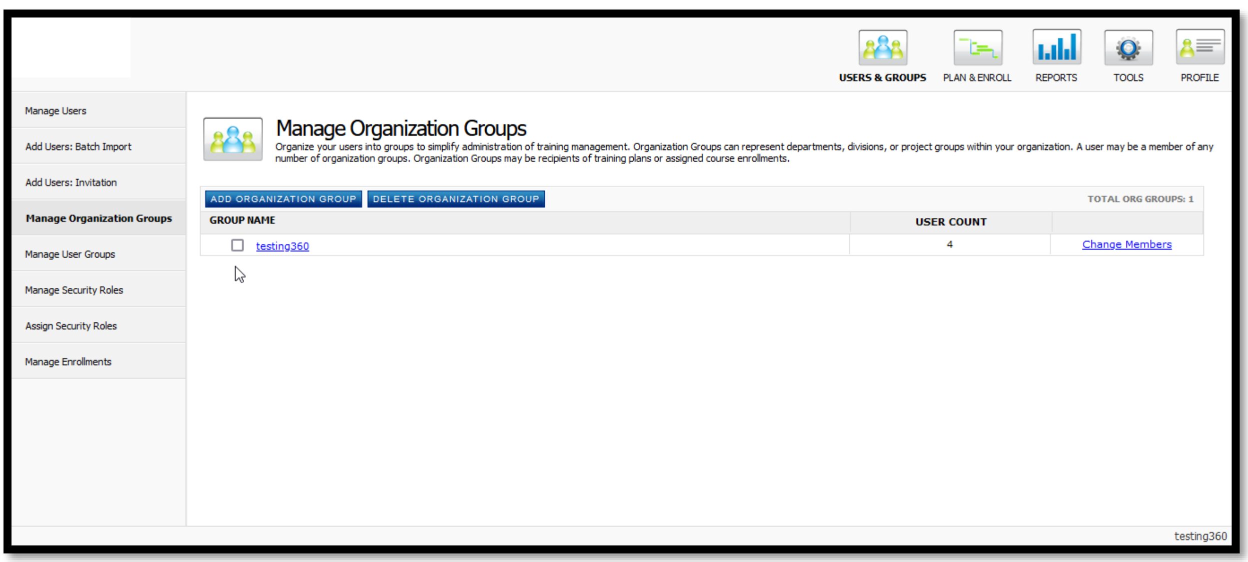


NOTE: If you need help with the batch import option, please contact support@360training.com.

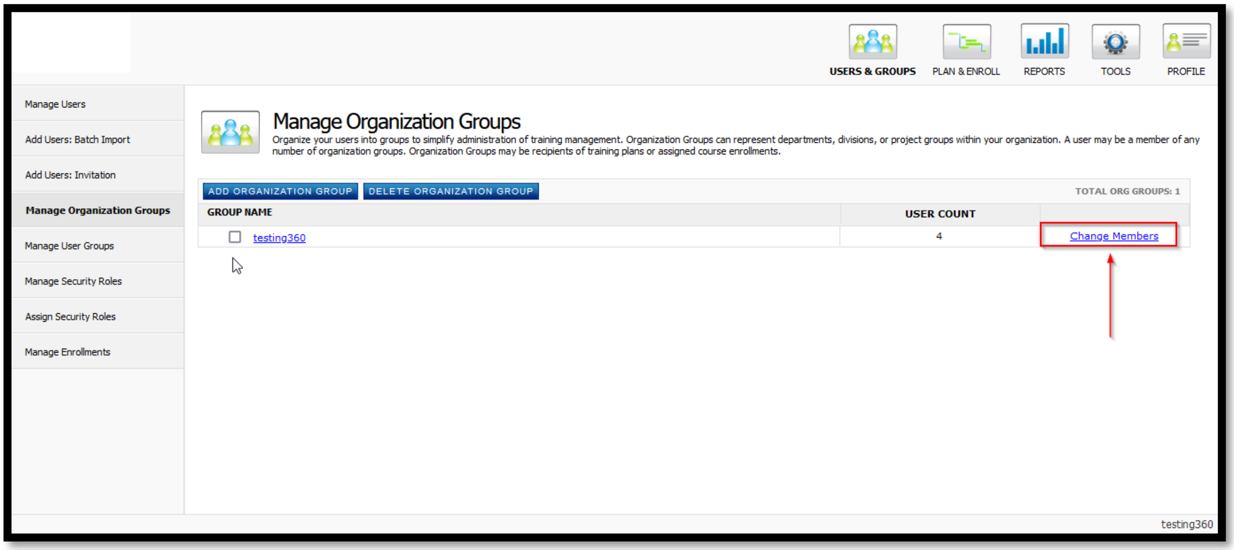
STEP 6
MANAGE ORGANIZATION GROUP
Click MANAGE ORGANIZATION GROUPS on the top left-hand side of the screen.



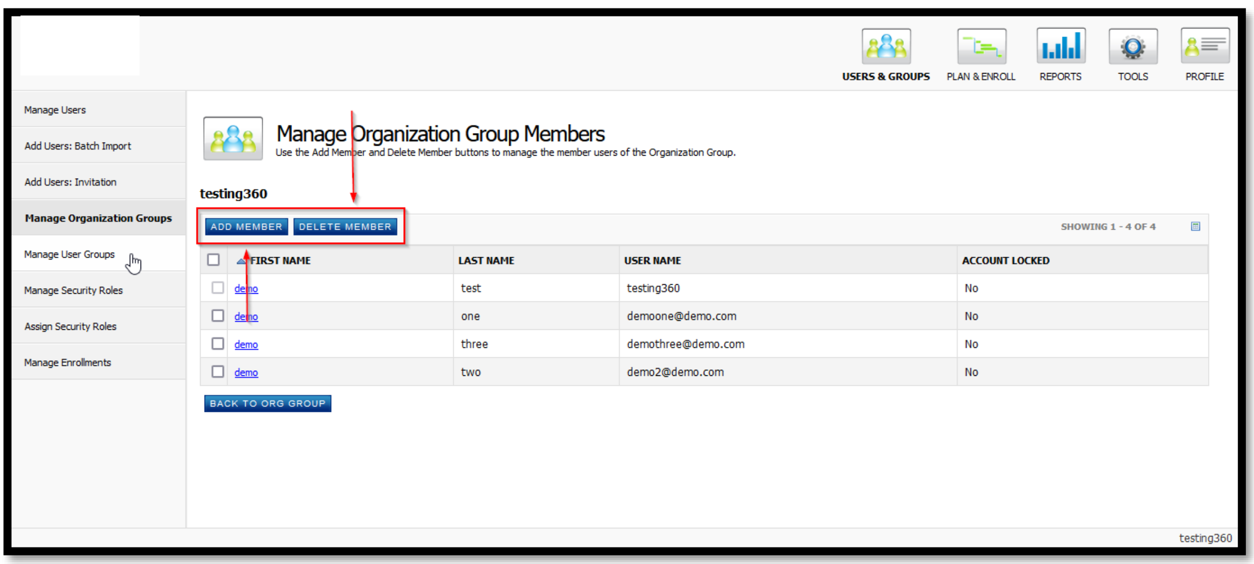
You can view the organization groups by clicking on the group names.



To view or edit the members in a group, click CHANGE MEMBERS.



You will be able to ADD MEMBERS and DELETE MEMBERS from the group.

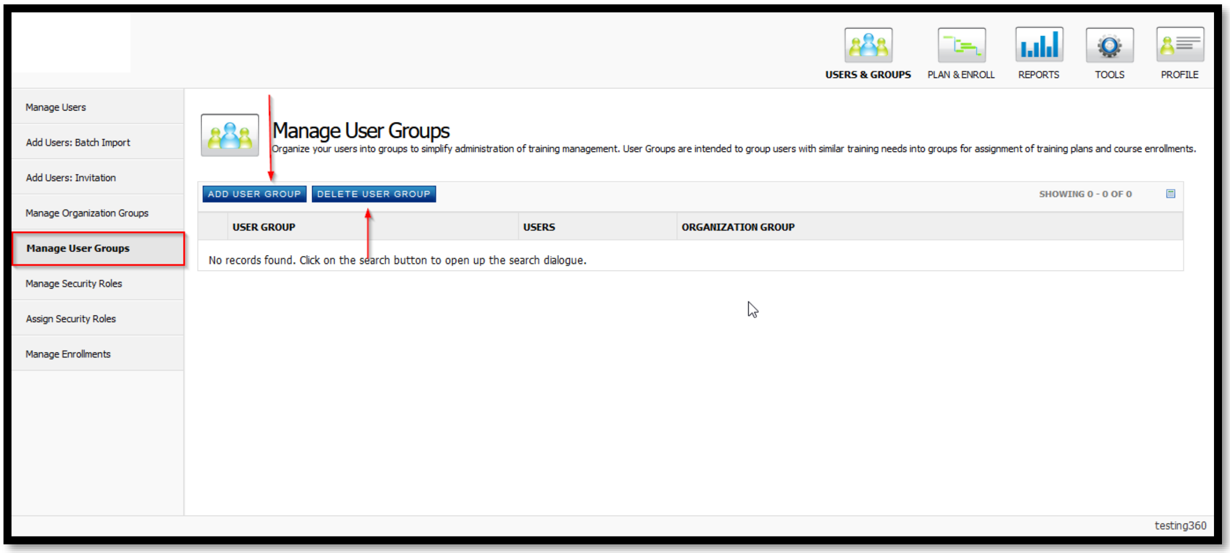


STEP 7

MANAGE USER GROUP

Organize your users into groups to simplify the administration of training management. User Groups are intended to organize users with similar training needs into groups for the assignment of training plans and course enrollments.

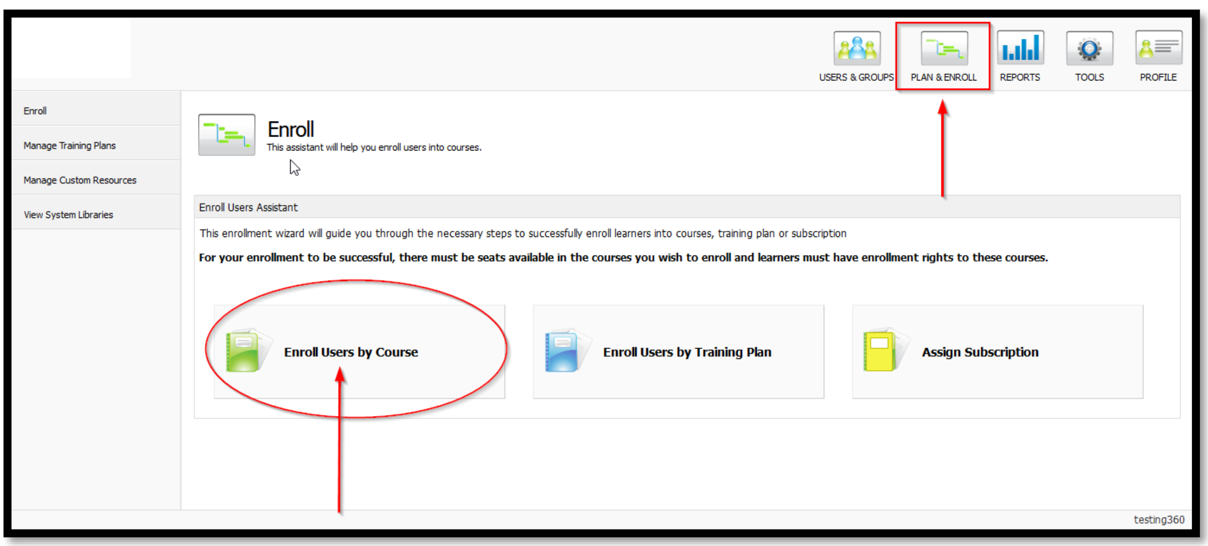
There are two options available: ADD USER GROUP or DELETE USER GROUP.



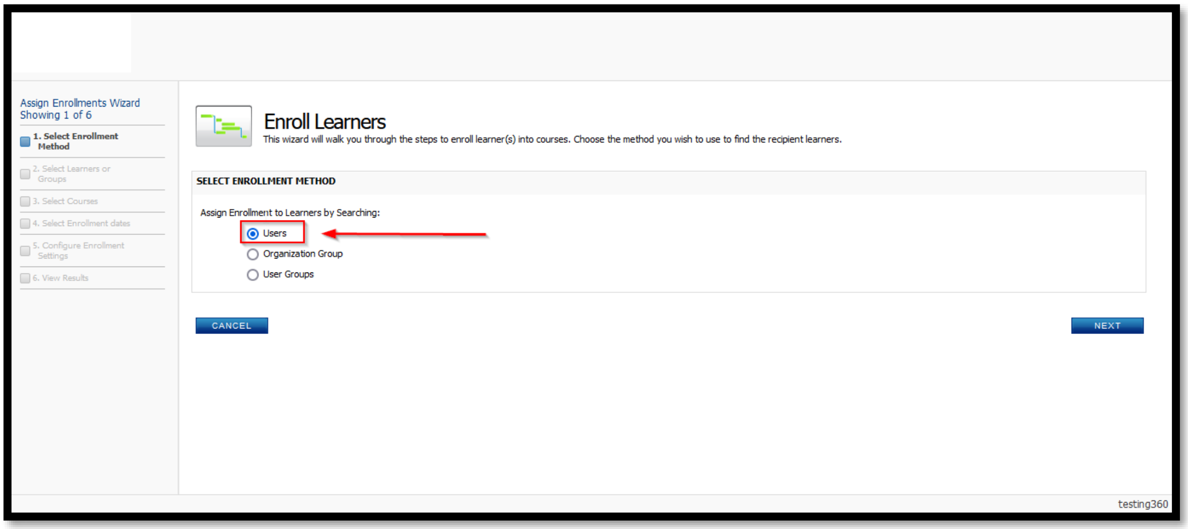
STEP 8

PLAN & ENROLL

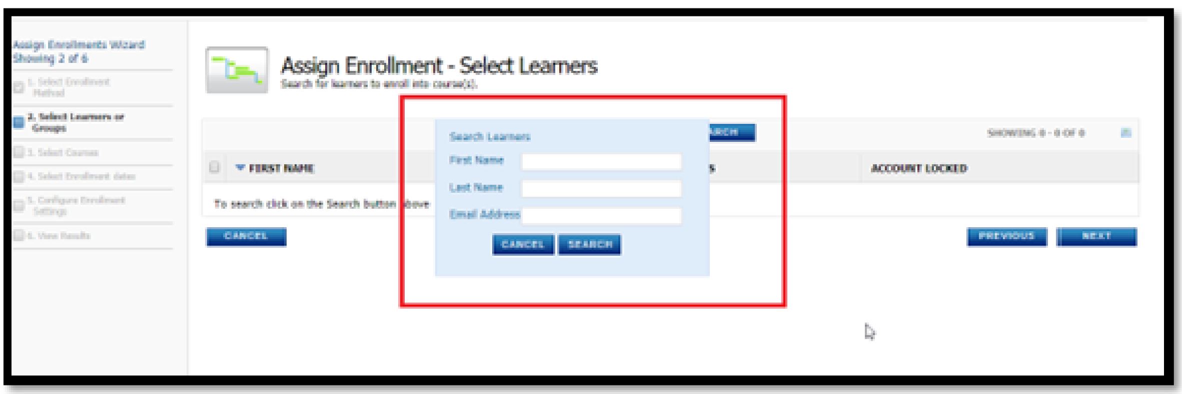
Select ENROLL USERS BY COURSE



Then select USERS.

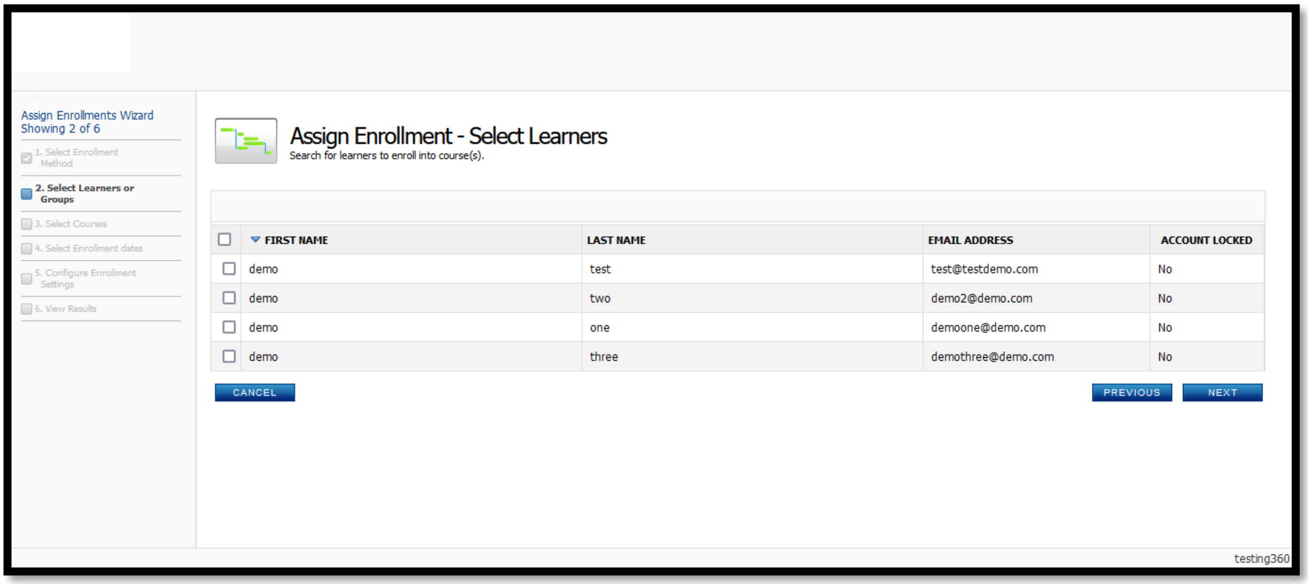


You can search for the user you want to enroll by first name, last name, or email address.

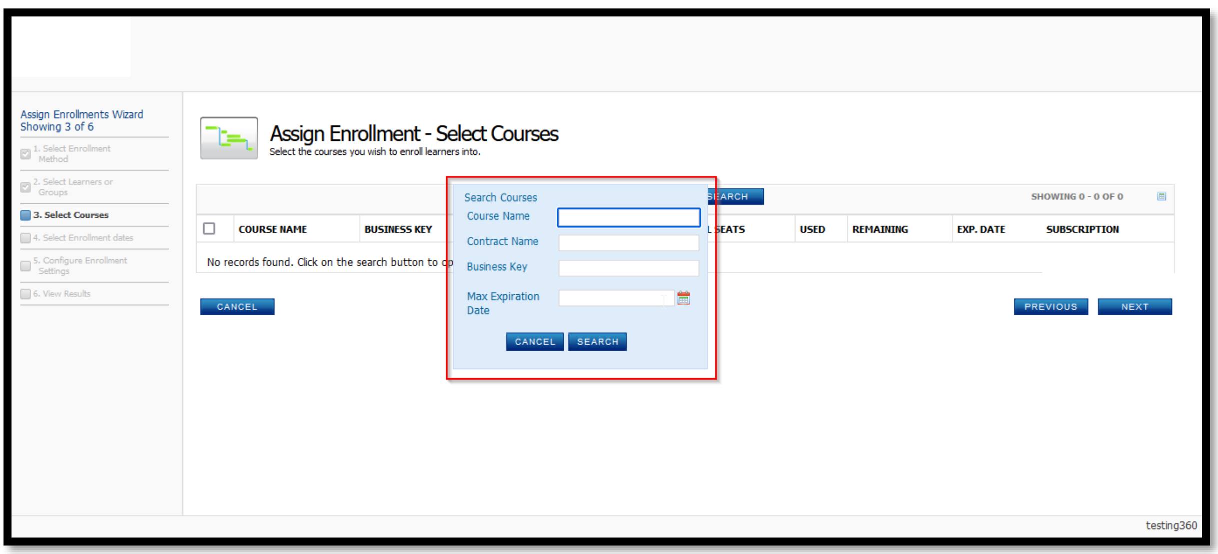


SEARCH TIPS: Inadvertently adding a space at the end of a name or email address may cause the search to return unexpected results. Make sure there are no spaces after any text you type in search fields. You can also leave all the fields blank to search to see all the users in your account.

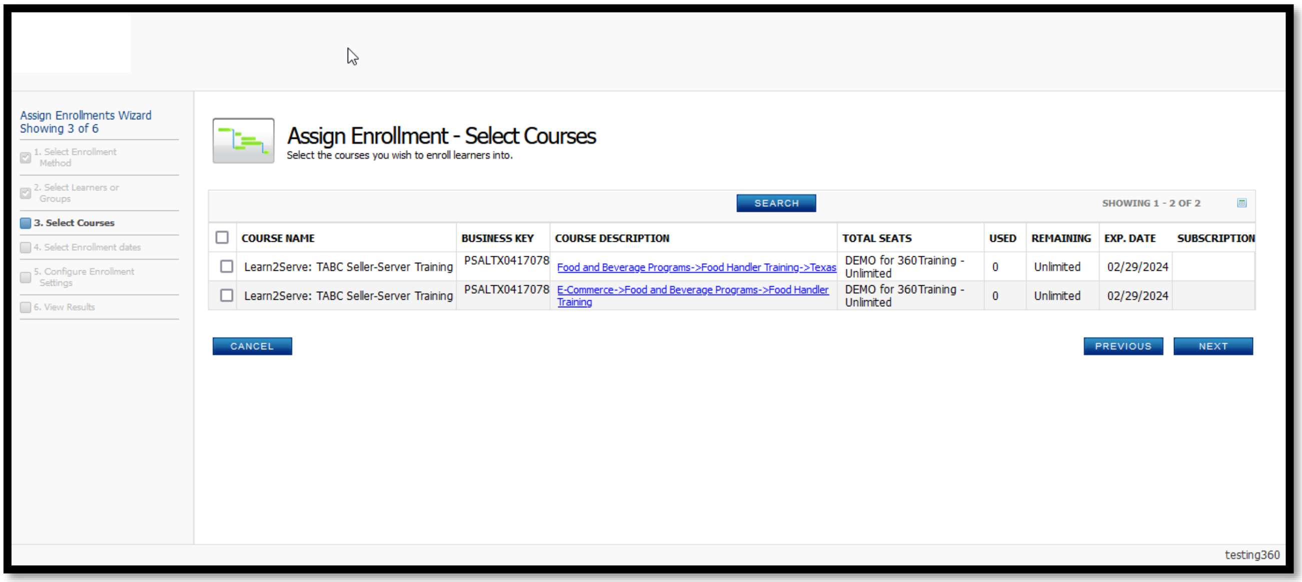
Select the user you want to enroll by clicking the box next to their name, then click NEXT.



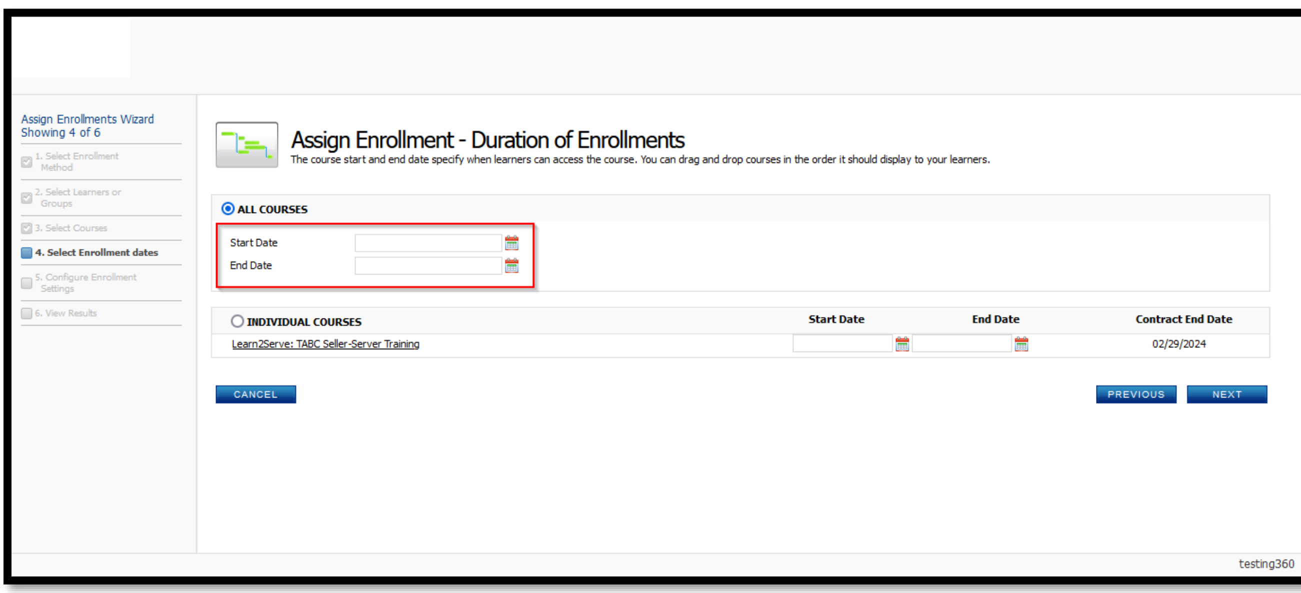
Choose the course you want to enroll the user in by searching by course name:



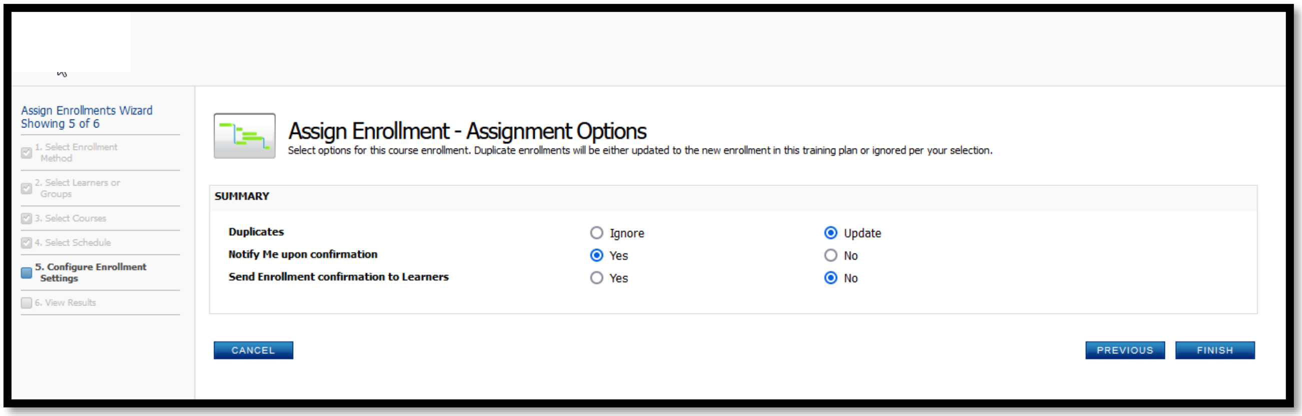
Select the desired course from the results.



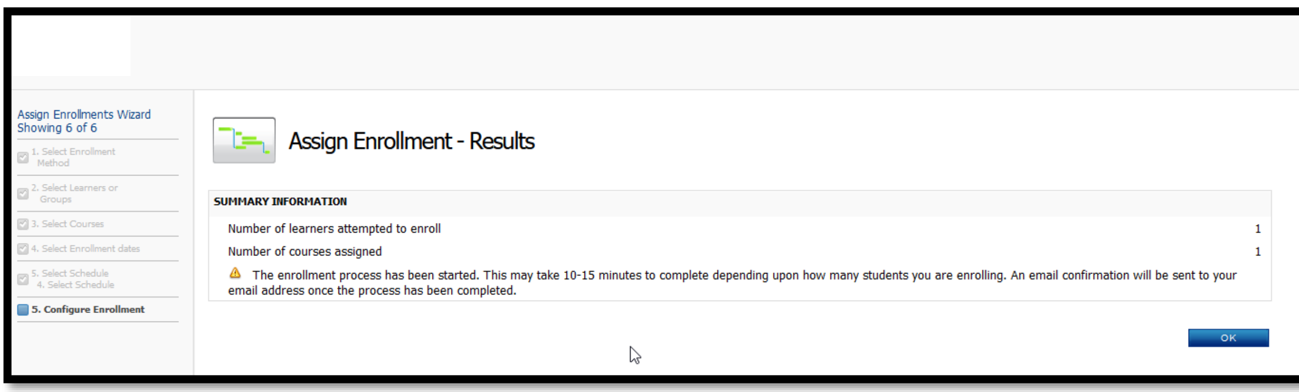
Next enter a start and end date for the course. The end date cannot be more than 365 days past the initial date of enrollment.



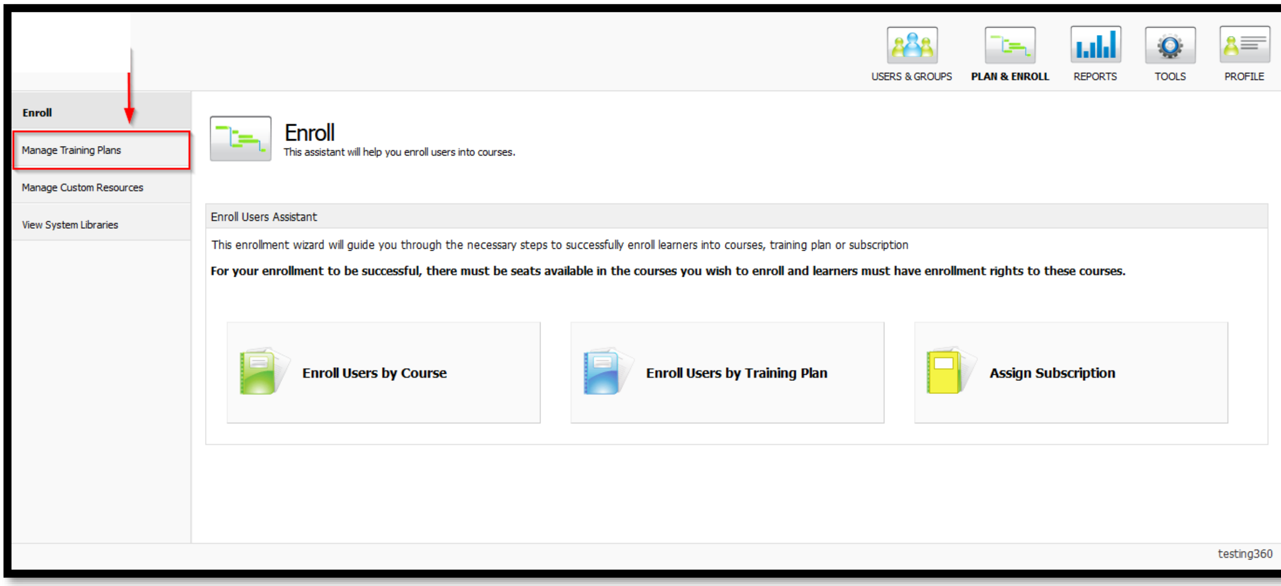
On the final screen of the training plan assignment, you can choose to Send Enrollment Confirmation to Learner by choosing YES. Click FINISH to complete the enrollment. You must click FINISH to ensure the course(s) is assigned.



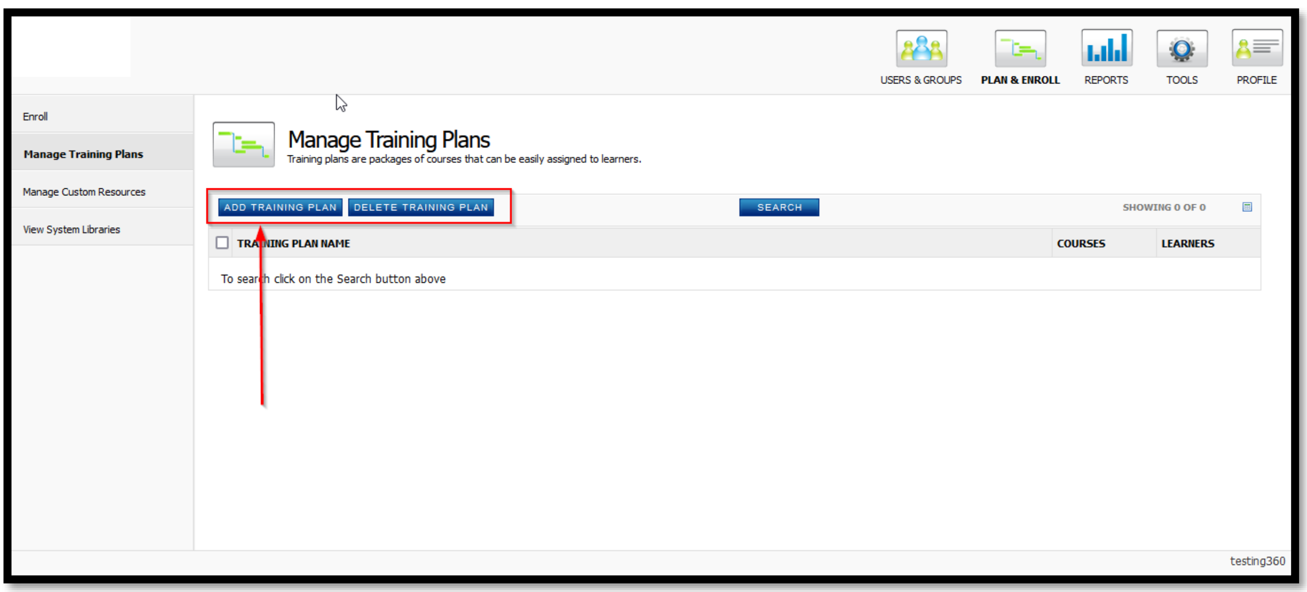
Once you've clicked "finish," you will see a confirmation screen confirming the enrollment was successful.



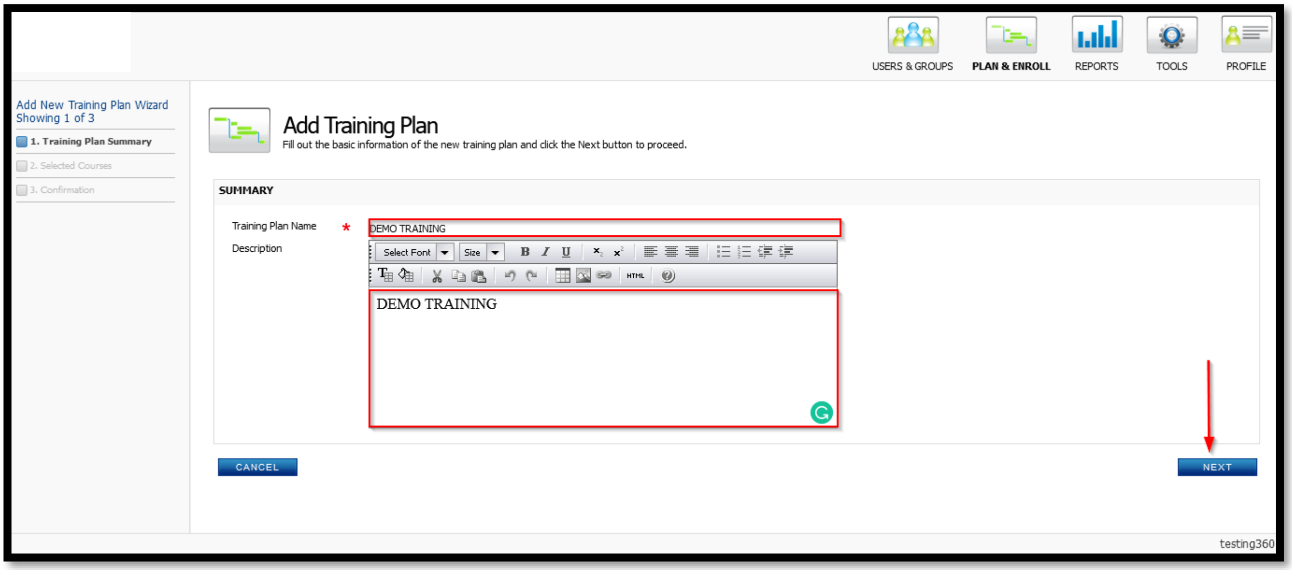
Select Manage Training Plans on the left-hand corner of the screen.



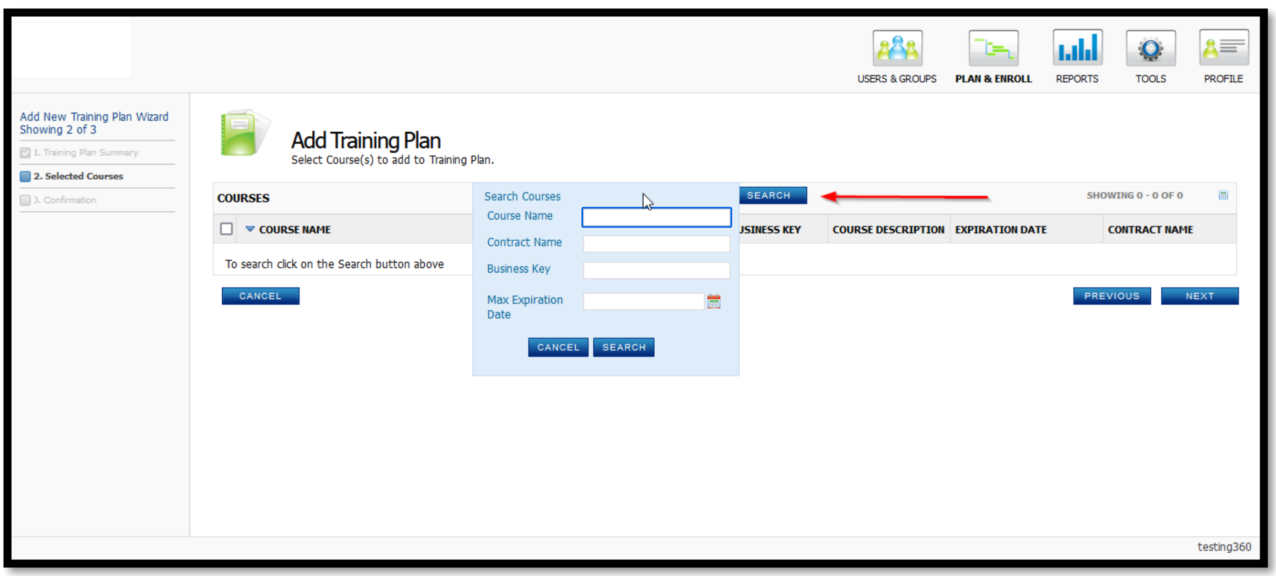
Add Training Plan



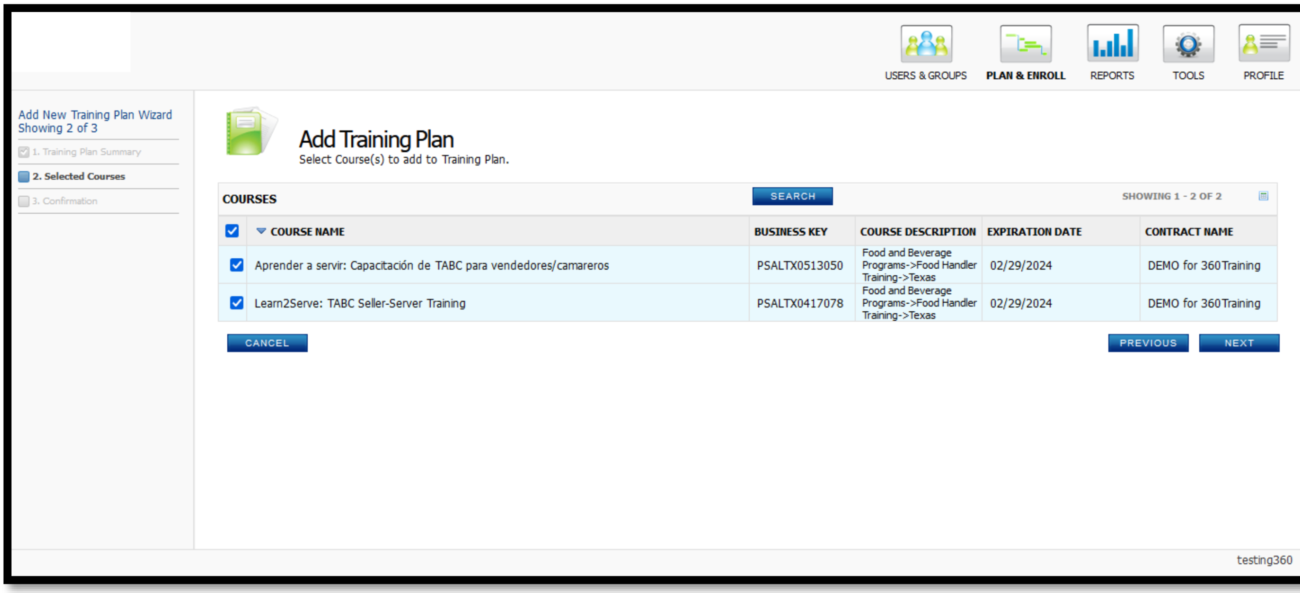
A new window will appear to fill out the basic information of the new training plan with **Training Plan Name** and **Description. C**lick the **Next** button to proceed.



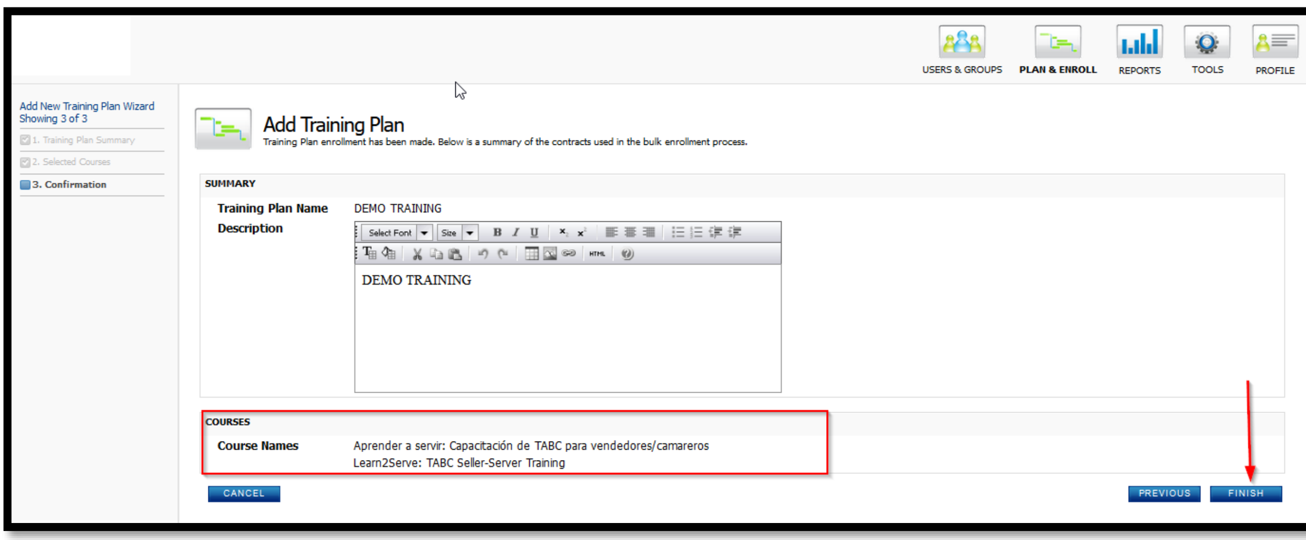
Click on the "**Search**" button and for search options by **Course Name**, **Contract Name**, **Business Key** and **Max Expiration Date.**



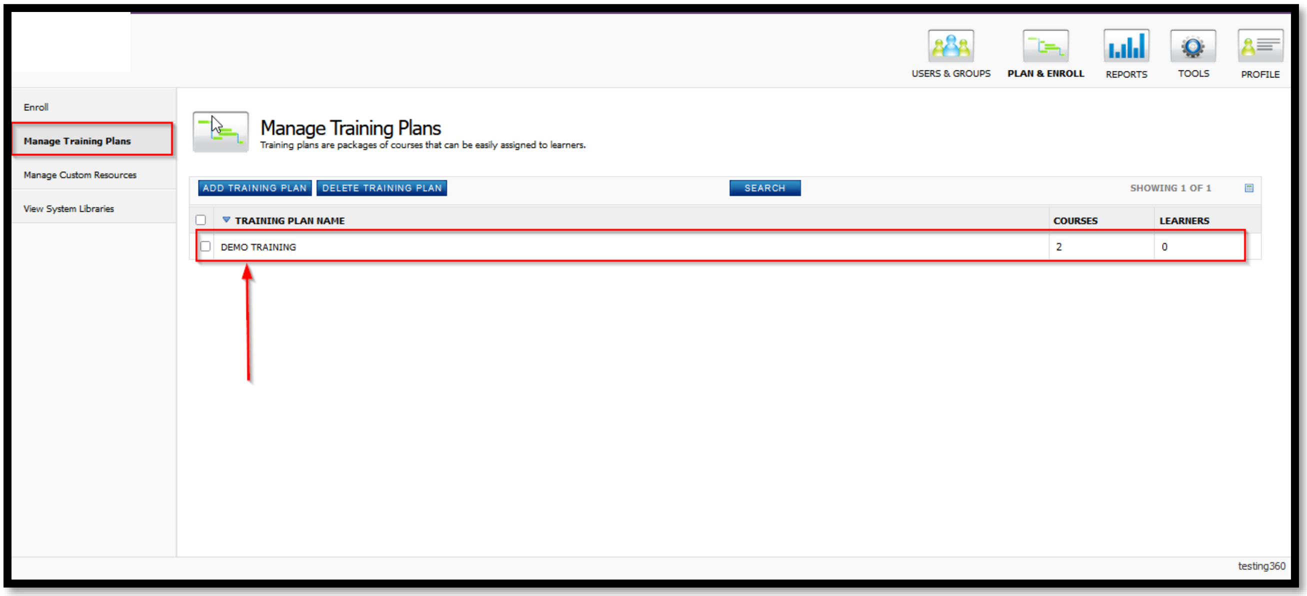
Now just do a blank Search and all the courses available in your contract/entitlement will appear. Select the desired courses to add in the training plan and click next.



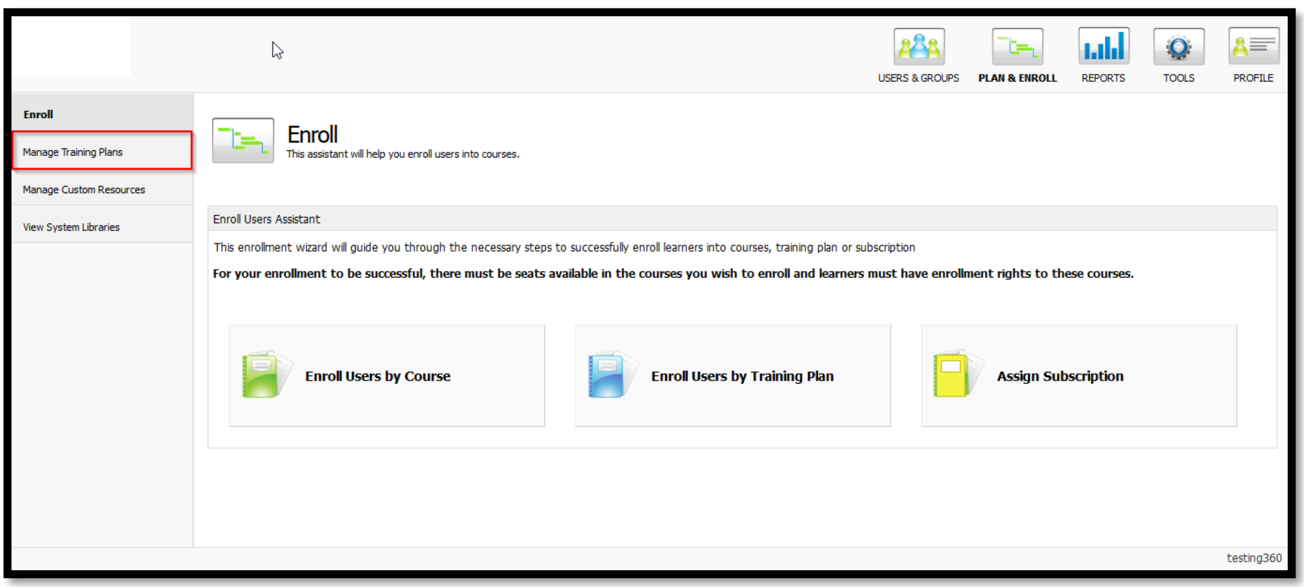
Training Plan enrollment is done. Below is a summary of the contracts/entitlements used in the training plan setup process. Once ready to proceed with the training plan, click finish.



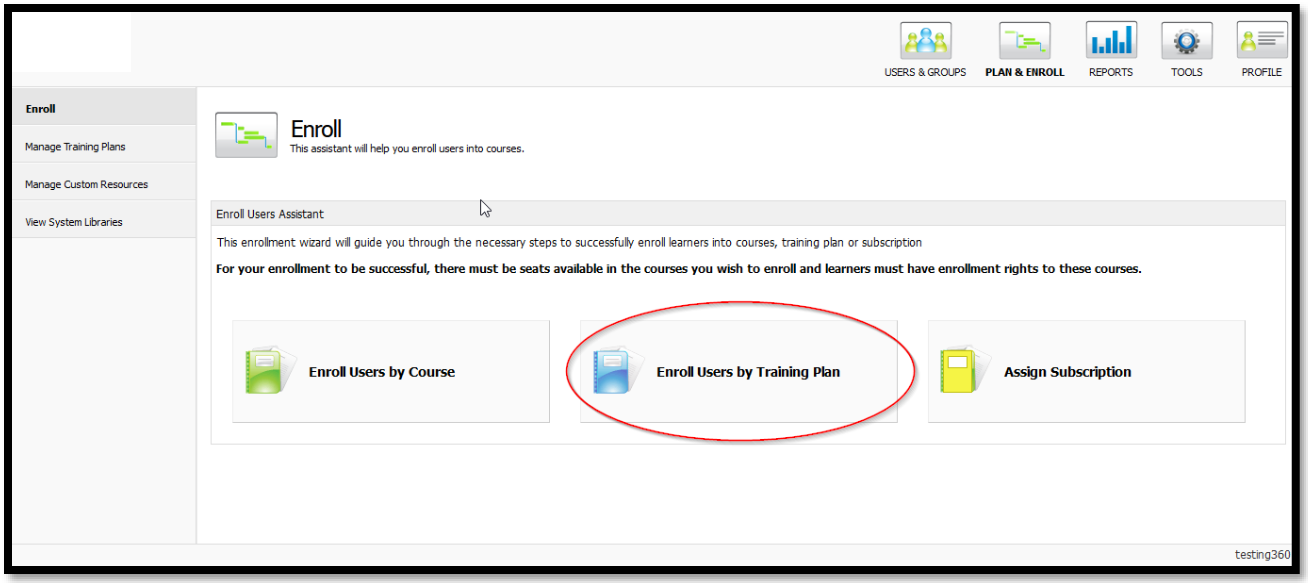
Now again click on Manage training plans and click the search button to view the new training plan created or any previous training plans created.

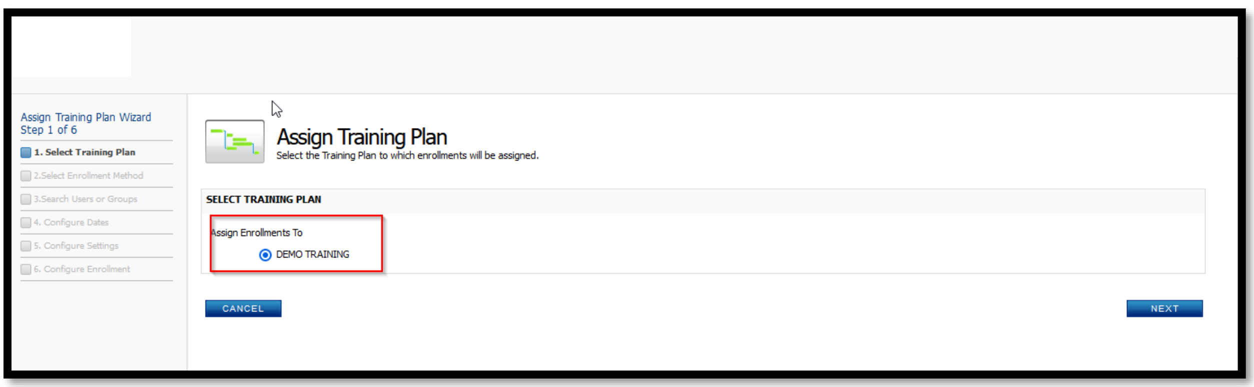


Select ENROLL USERS BY TRAINING PLAN

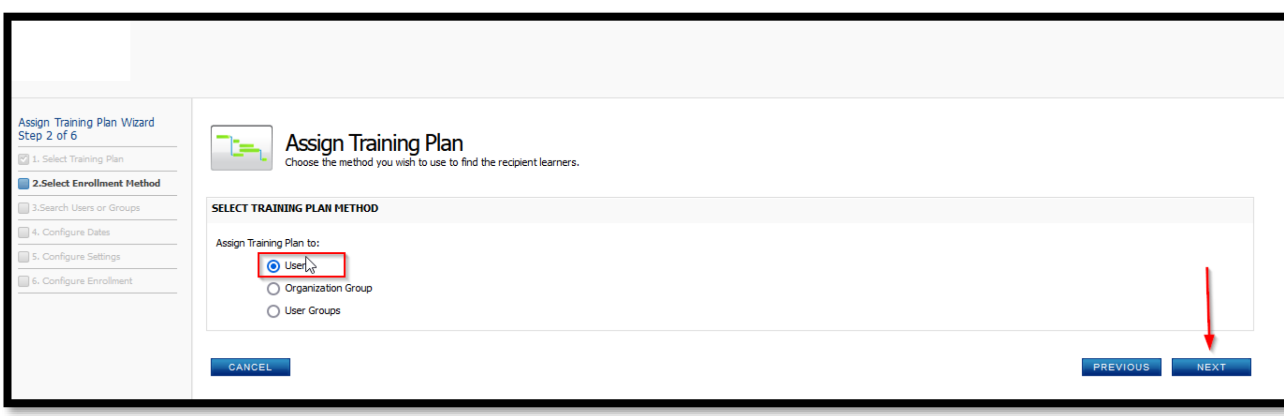


Then select the desired training plan.

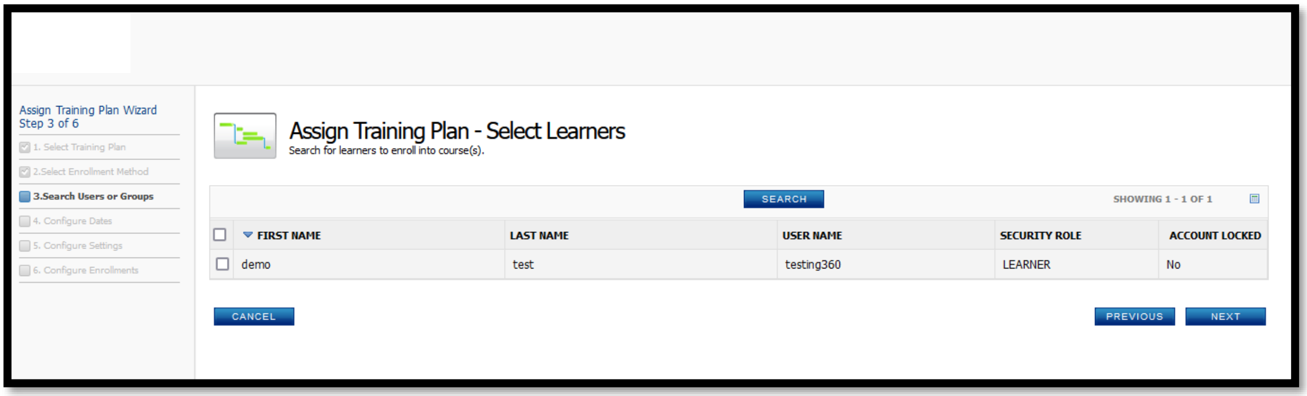




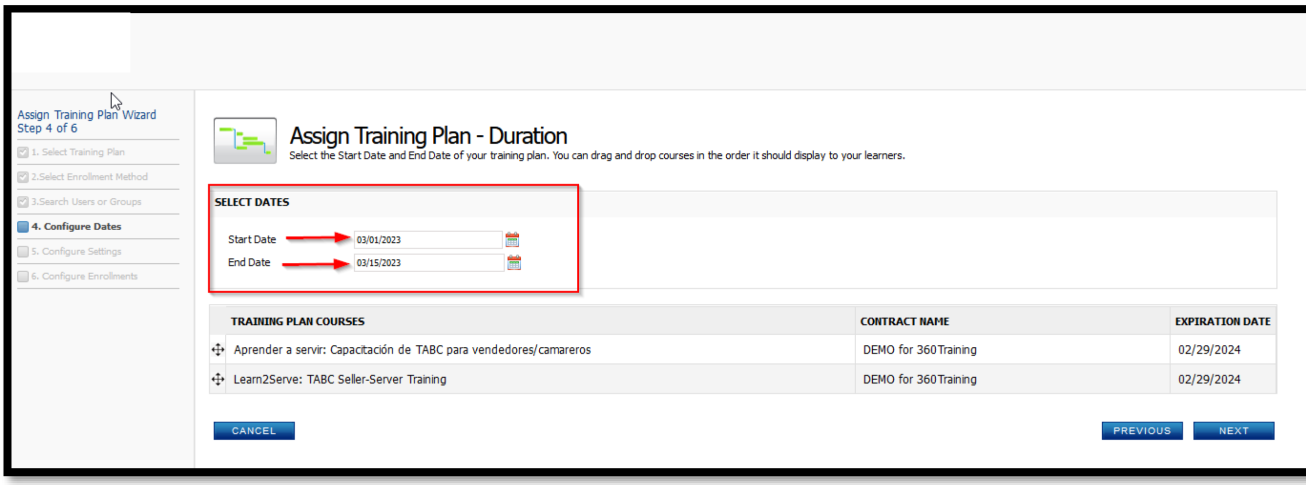
After selecting a training plan, there are three options: You can assign a training plan to a USER, ORGANIZATION GROUP or USER GROUP.



Selecting ORGANIZATION GROUP

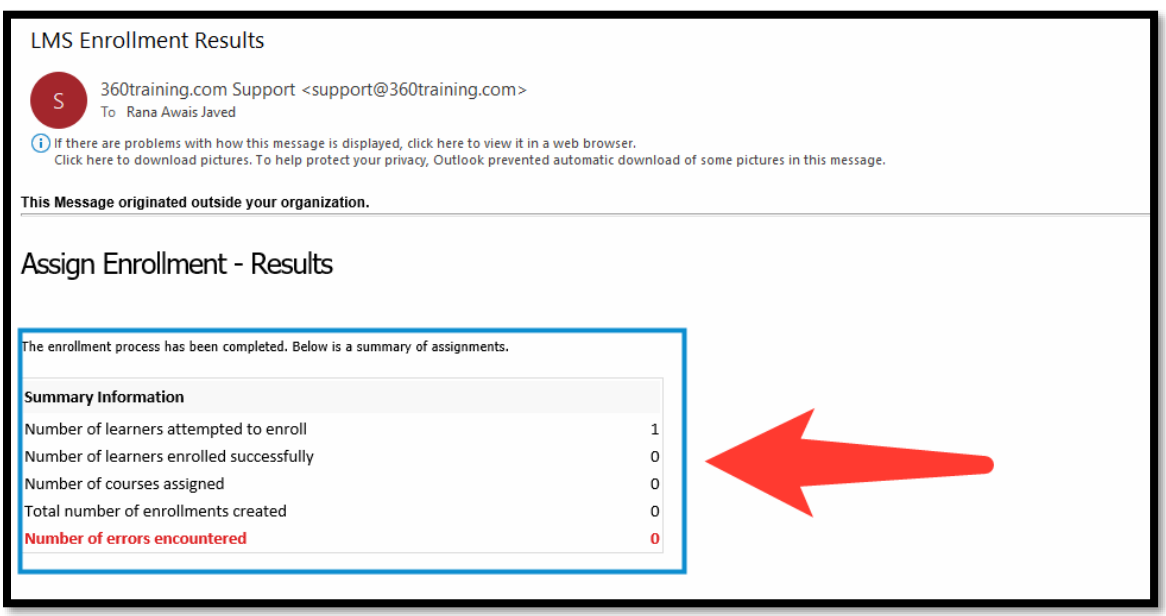


After clicking NEXT, assign the start date and end date.



The following two steps are default actions. We recommend continuing with the system options as they are selected.

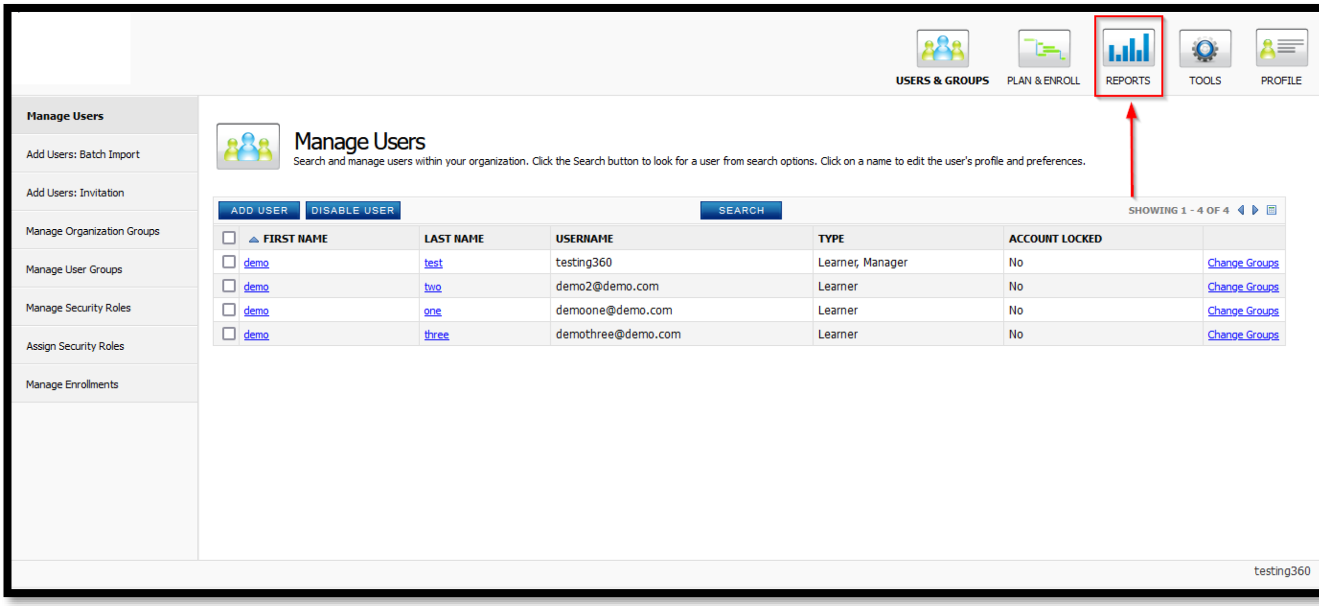
You will receive an email confirmation of LMS Enrollment Results.



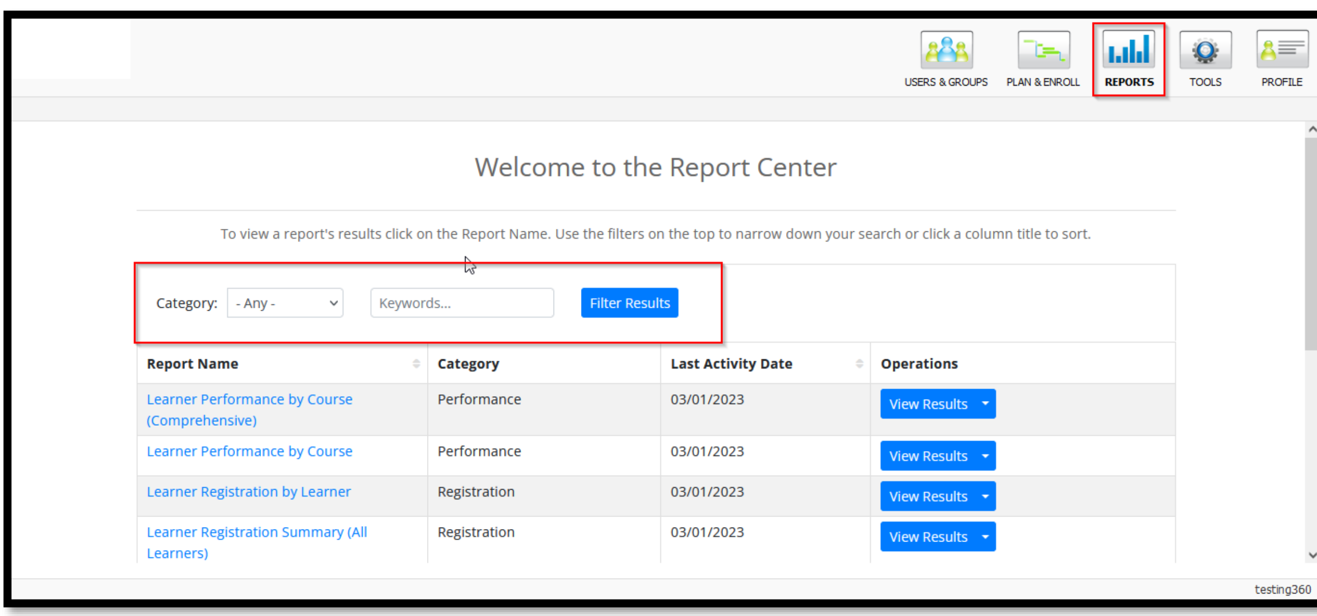
STEP 9

REPORTS – Tracking progress via On-Demand Reports

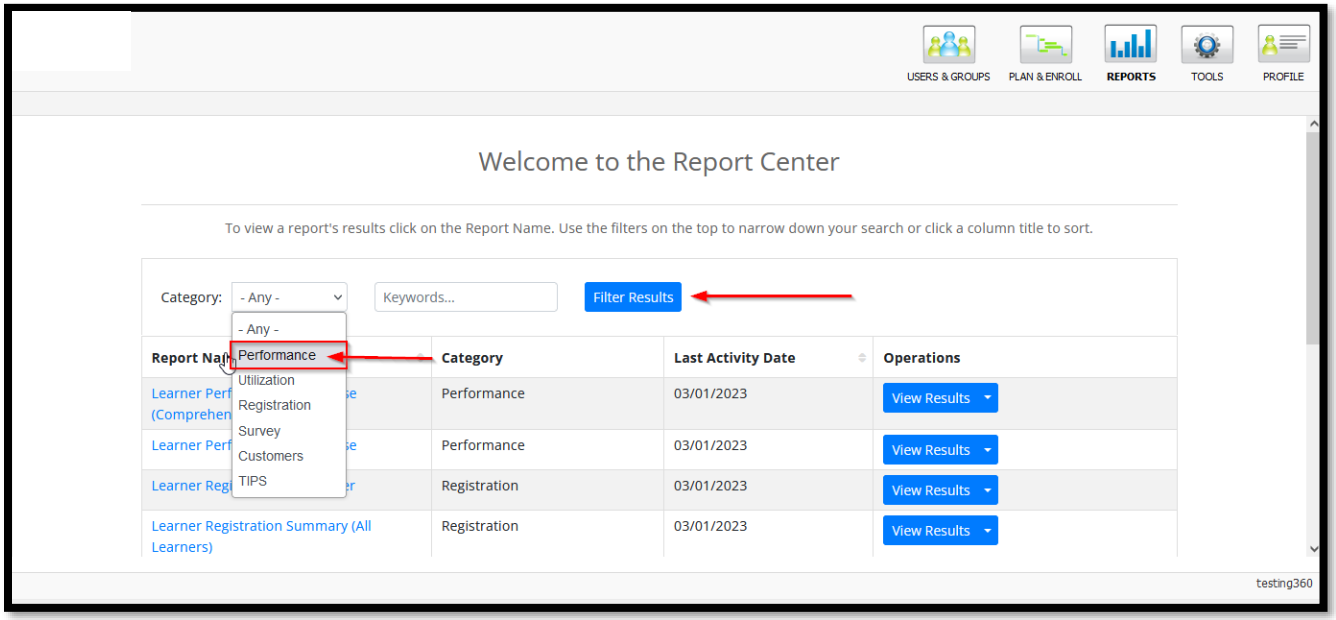
Once logged in, select REPORTS in the top right corner of the screen.



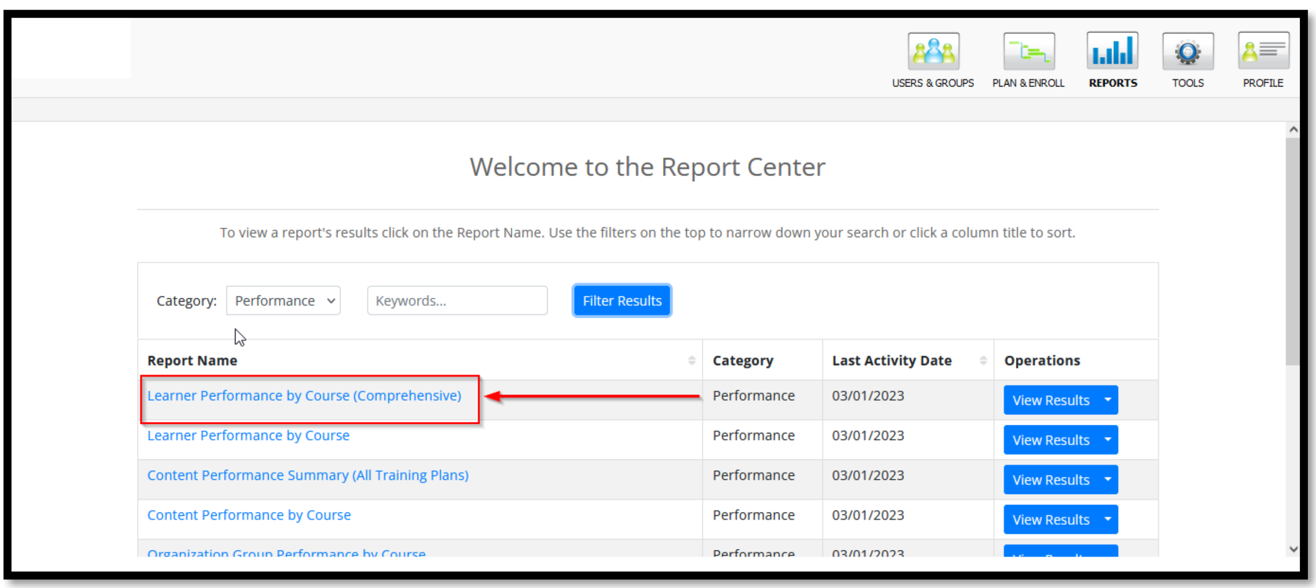
From here, you can filter between different types of reports.



The “Learner Performance by Course (Comprehensive)” report is the most useful report for most managers. This report can be found by filtering by PERFORMANCE in the CATEGORY drop-down box and then pressing FILTER RESULTS.

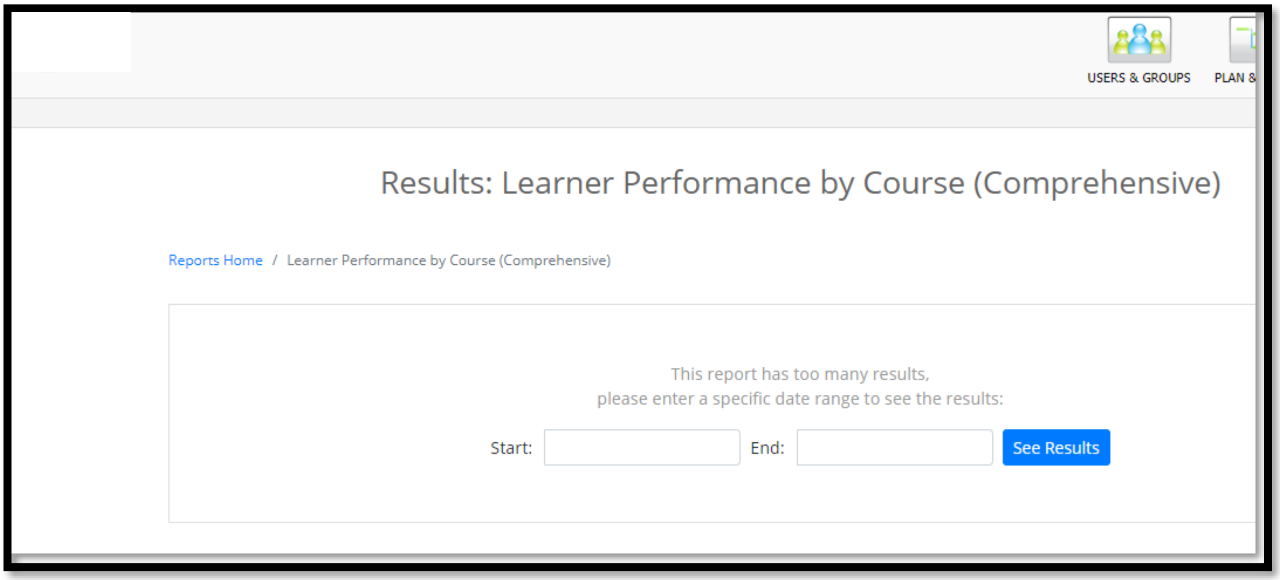


To run the report, click on the report name.

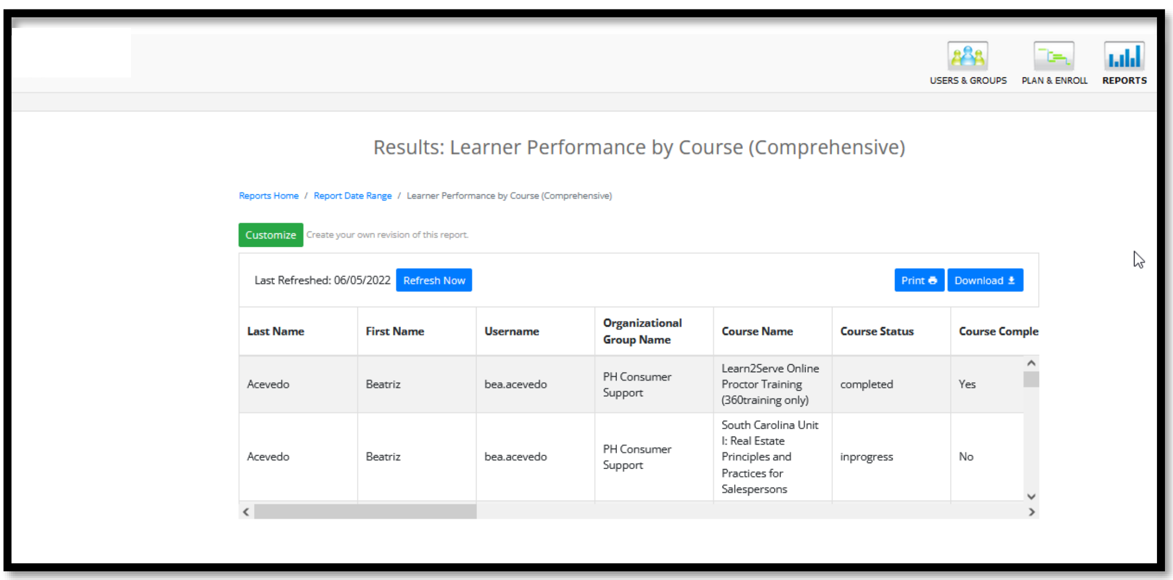


Select the date range you want the report to cover and click SEE RESULTS.

NOTE: Make sure to set a start date far enough back to capture the enrollment date of all the users you would like to review. For example, running a report from 1/1/22 – 6/30/22 will not include any users who were enrolled in 2021.

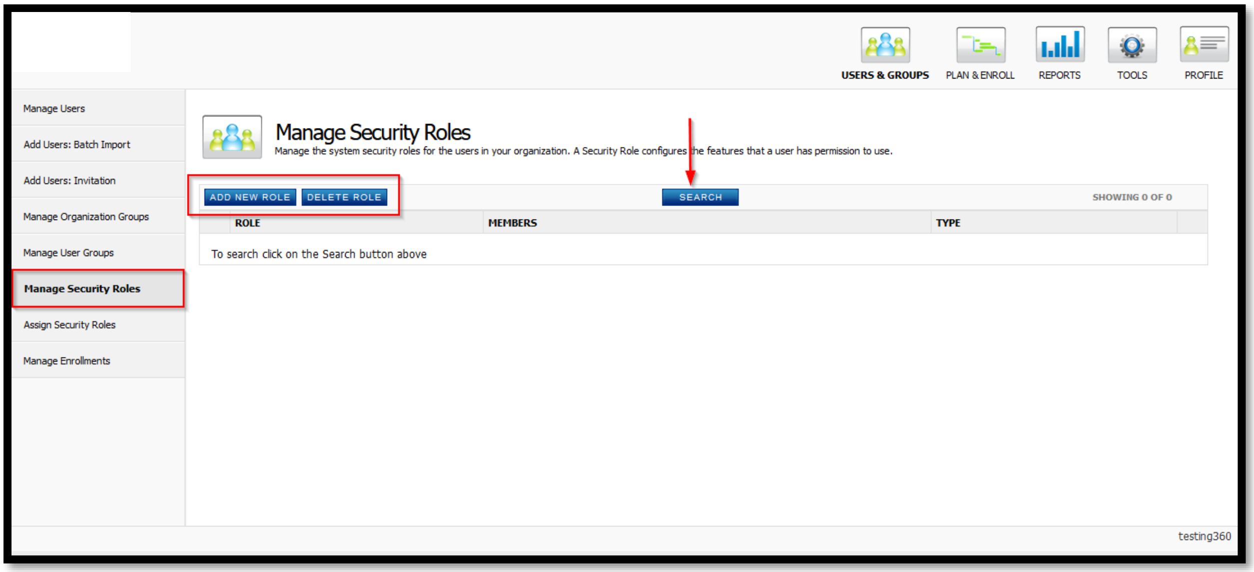


Once the report is completed, you will see the results on the page. From here, click DOWNLOAD to receive the report as an Excel file.

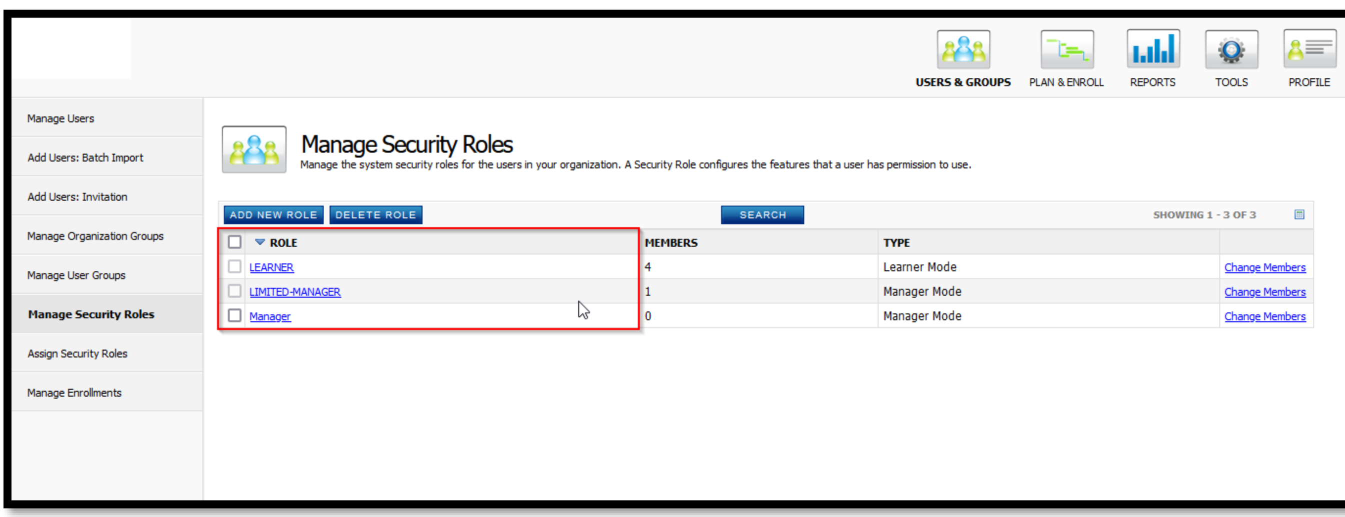


STEP 10
MANAGE SECURITY ROLES
Manage the system security roles for the users in your organization. A Security Role configures the features that a user has permission to use.

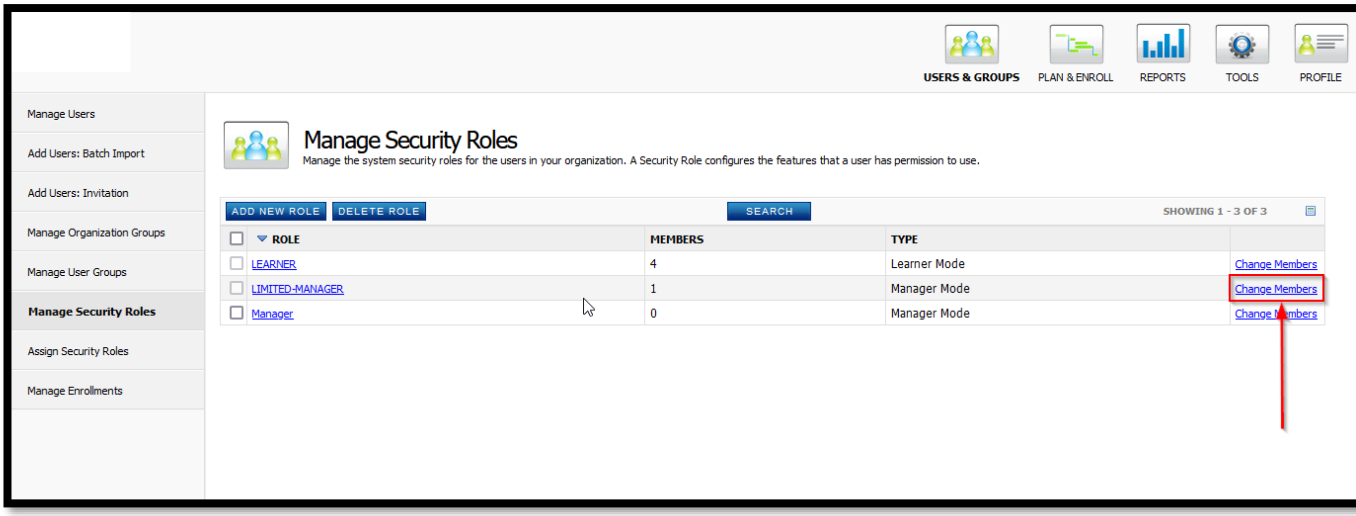
You can add a new role or delete a role by clicking SEARCH. This will allow you to view the security roles.



Manage the permission settings of a security role. Your organization may have one **default Learner Security Role** that all newly registered users will have as their Learner role by default.



Clicking on CHANGE MEMBERS will allow you to view the users in the assigned role or remove the learner in the same step.



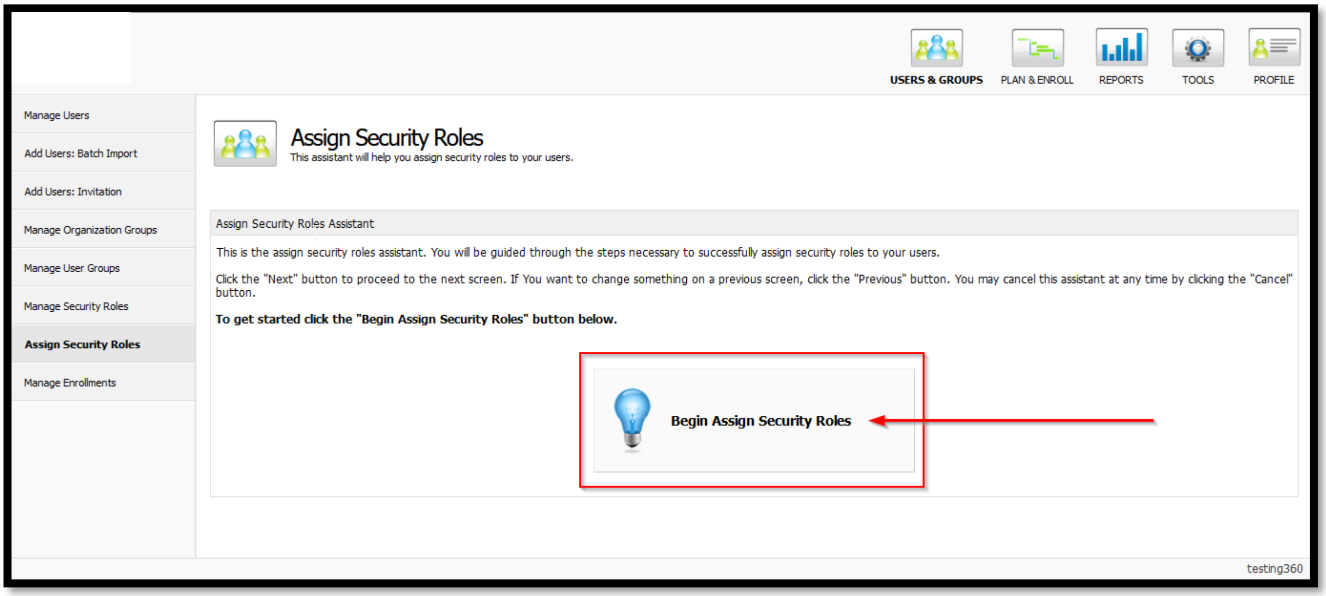
Clicking on the SECURITY ROLE will allow you to view the enabled permissions. These permissions apply to Users & Groups, Plan & Enroll, Reports, and Tools tabs.

STEP 11

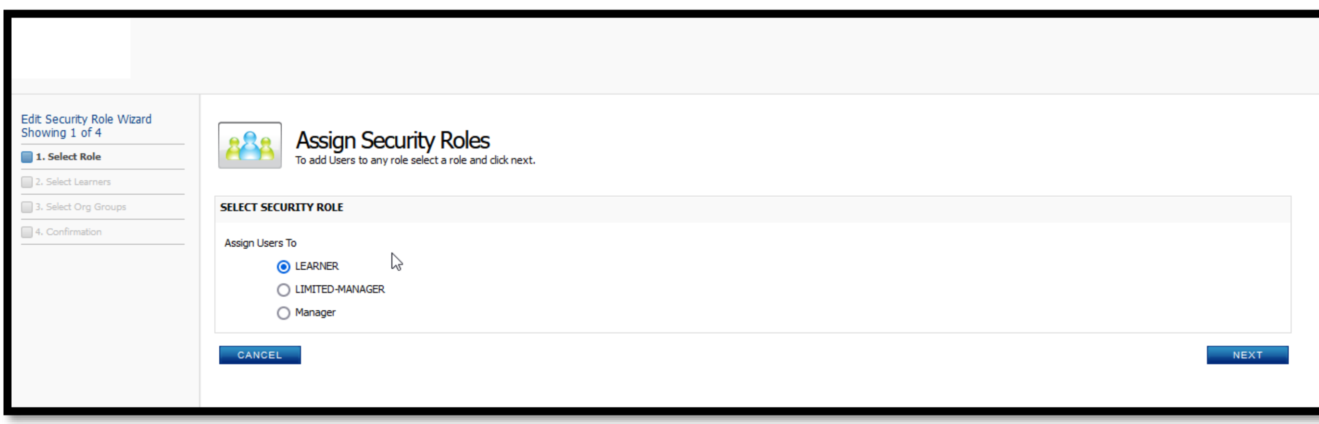
ASSIGN SECURITY ROLES

This is the Assign Security Roles assistant. You will be guided through the steps necessary to assign security roles to your users successfully.

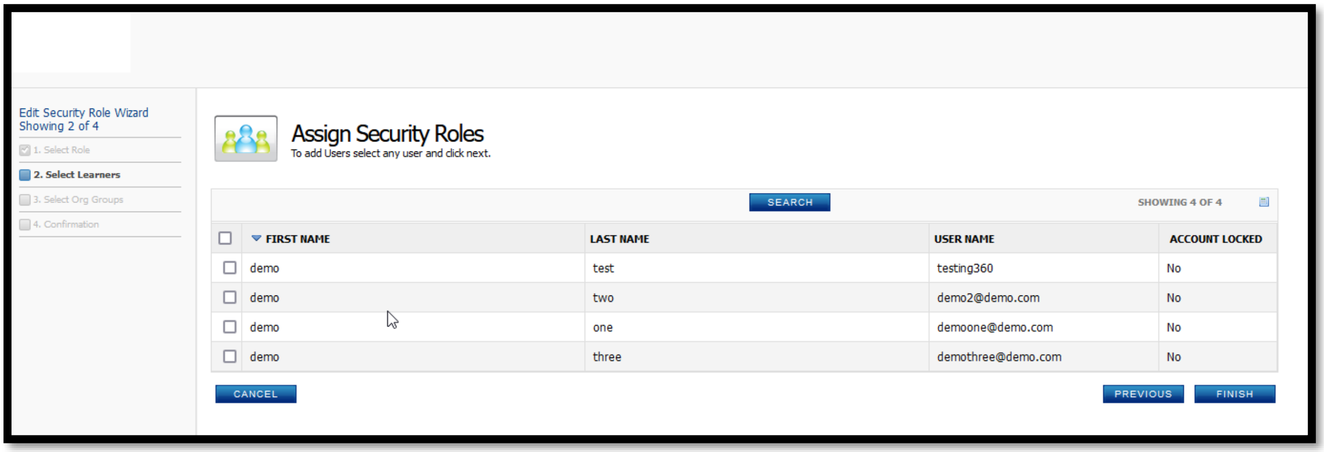
To get started, click BEGIN ASSIGN SECURITY ROLES link at the bottom of the screen.



Click NEXT to proceed. If you want to change something on a previous screen, click PREVIOUS. You may cancel the assistant at any time by clicking CANCEL.



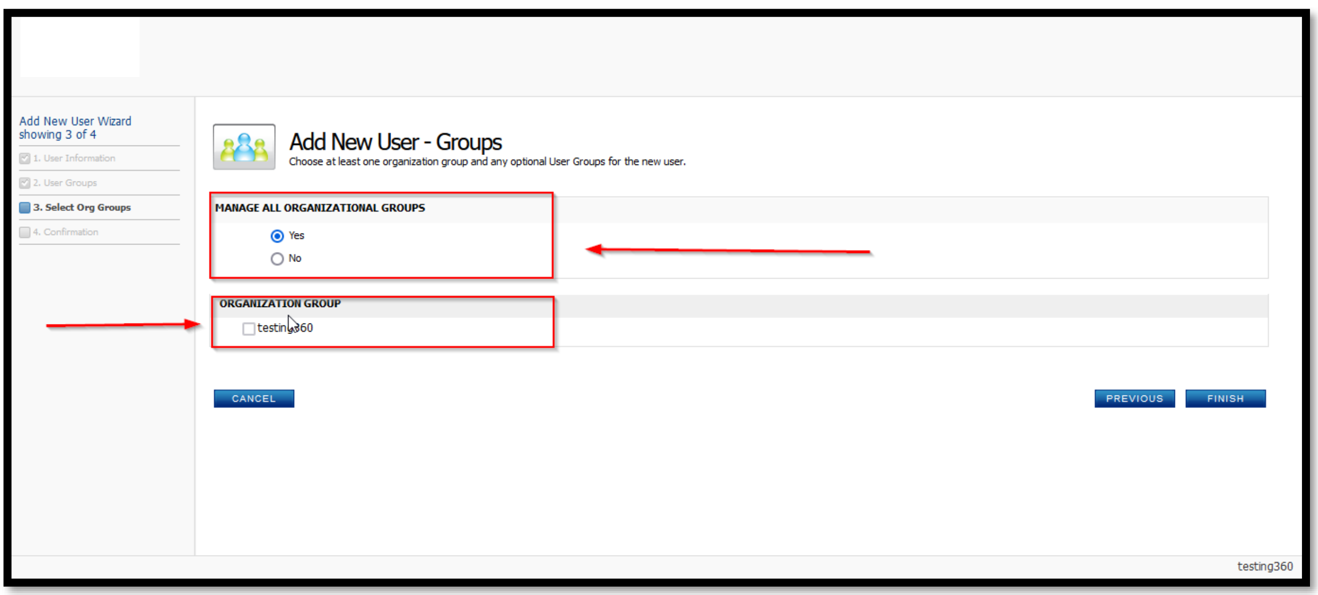
Search for a user you want to assign as a Learner or Manager.



Choose at least one organization group and any optional User Groups for the new user.

NOTE:

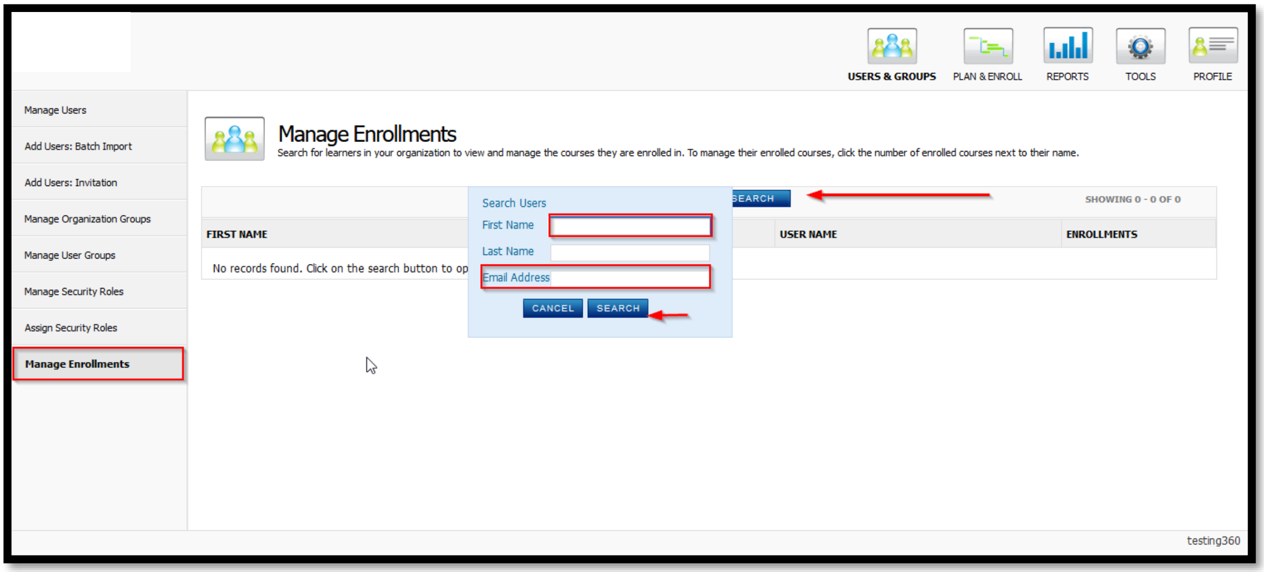
- If you choose "Yes," it will give that user access to manage all organization groups and users.
- If you choose "No," you must select one organization group to which you want the user to be added.



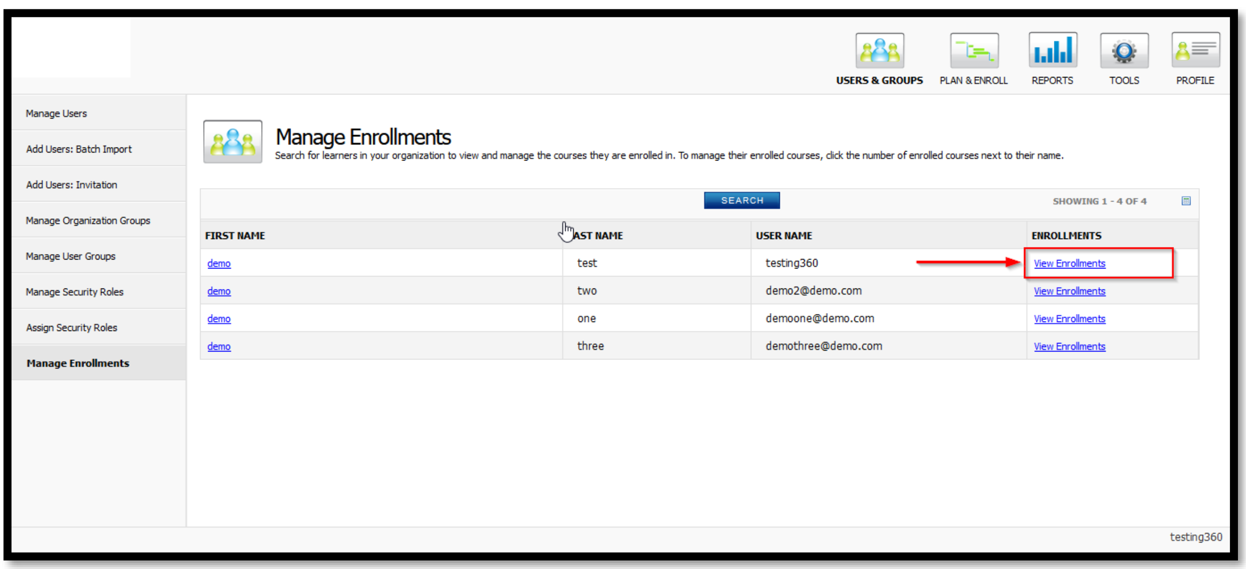
Click FINISH and a confirmation window will appear.

STEP 12
MANAGE ENROLLMENTS

Search for learners in your organization to view and manage the courses they are enrolled in. To manage their enrolled courses, click the number of enrolled courses next to their name.

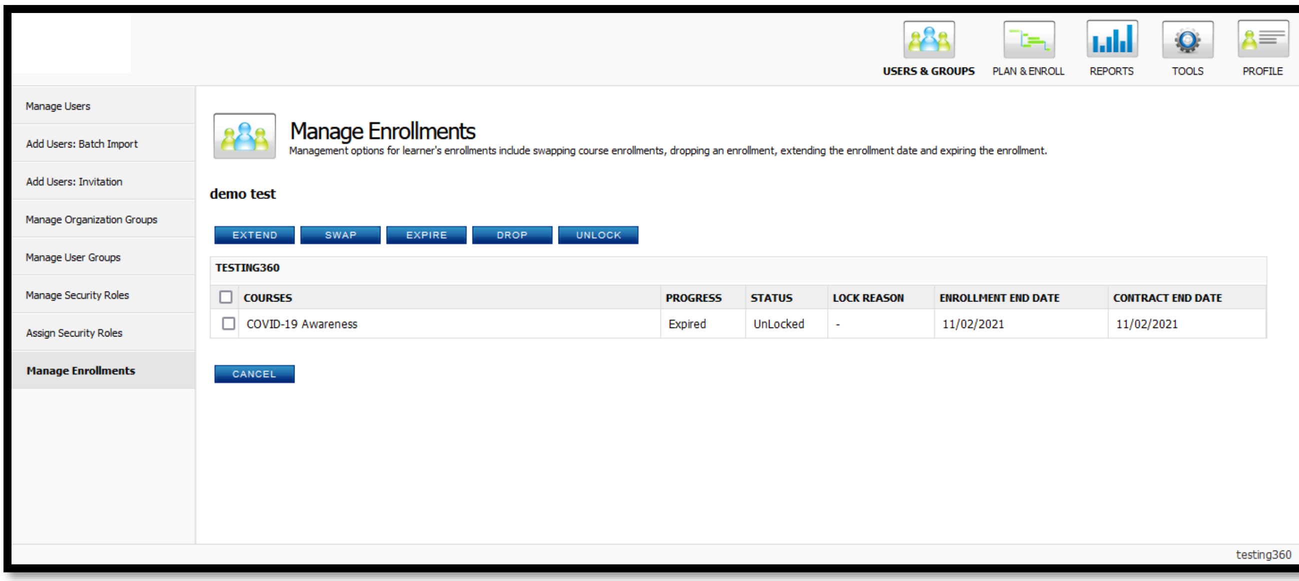


If you leave all fields blank and click SEARCH, you can view all the users listed under your customer account. Click VIEW ENROLLMENTS.



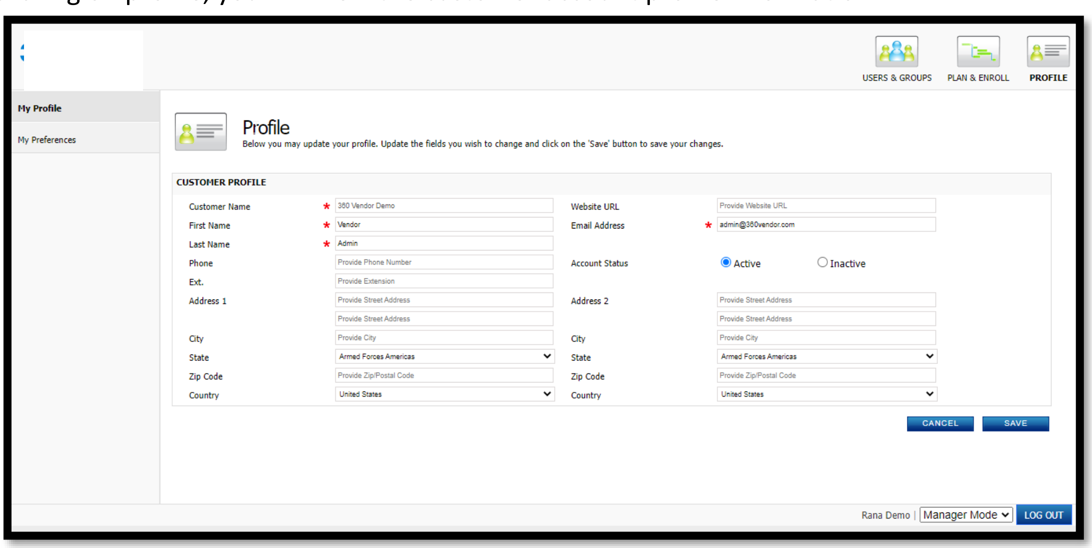
Now you can view the following columns: courses, progress, status, lock reason and enrollment end/start date. You then have the options to:

- Extend a Course (within the timeframe allowed in the entitlement)
- Swap a Course (we recommend not using this option)
- Expire a Course (this is most helpful for cases where the user failed all the attempts in a course exam and the course status still shows in-progress which doesn't allow a new course to be added until the status shows expired)
- Drop a Course (if the wrong course was assigned or the employee is no longer with the company and the course hasn't been completed)
- Unlock a Course (If a course is locked, the user will most likely require customer support's assistance)

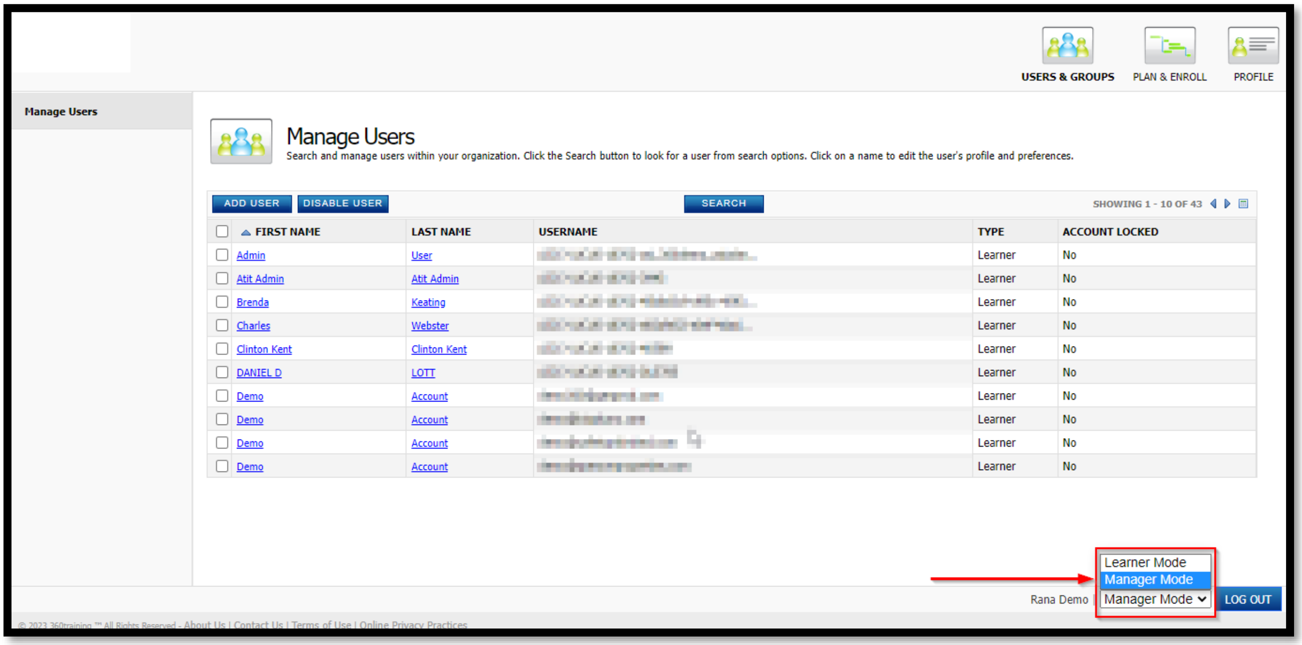


Profile

After clicking on profile, you will view the customer account profile information.



The bottom right-hand side of the screen allows you to switch between manager and learner mode. In case you are required to take a course or if you would like to update your profile information.



Compliance Training Online (CTO) - Contact Us

Visit our Resources page

Chat with us live on our website

Call: 512-410-7335

Email: support@360training.com