

Compliance Training Online (CTO) Platform

Manager-Level Access User Guide

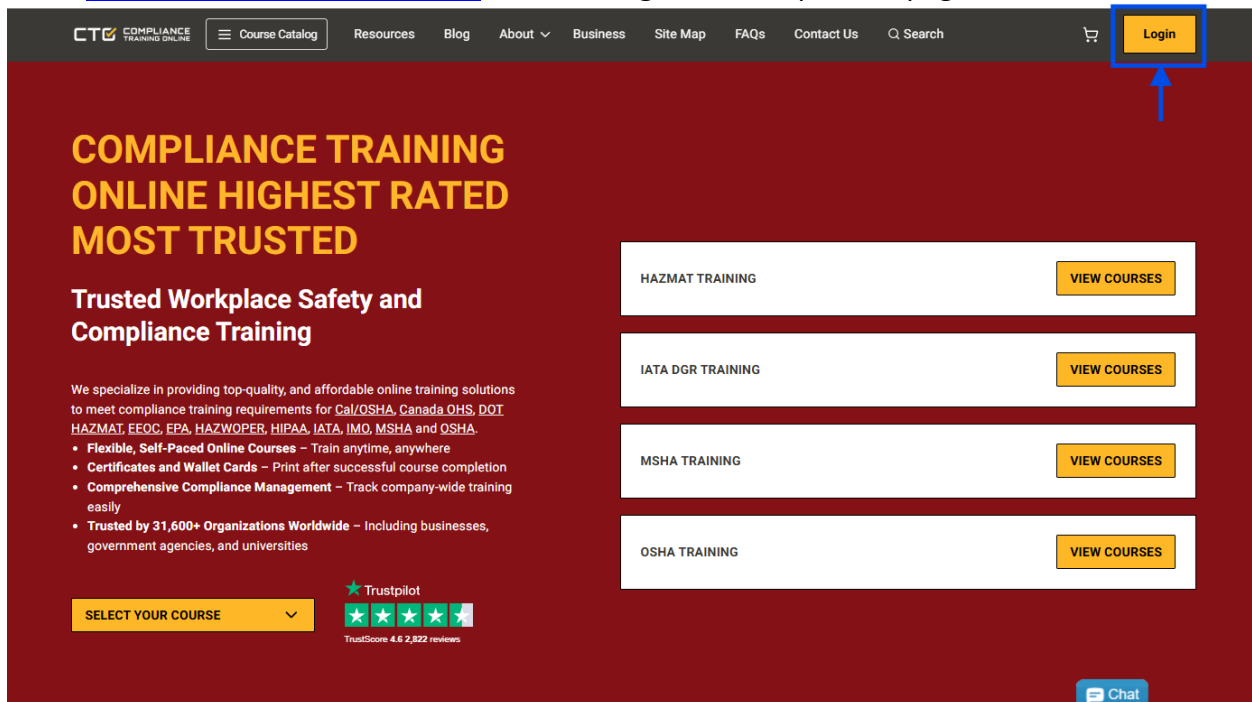
This document will guide you through the features and benefits available with FULL MANAGER ACCESS.

- **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.



CTO COMPLIANCE TRAINING ONLINE

Course Catalog Resources Blog About Business Site Map FAQs Contact Us Search

Login

COMPLIANCE TRAINING ONLINE HIGHEST RATED MOST TRUSTED

Trusted Workplace Safety and Compliance Training

We specialize in providing top-quality, and affordable online training solutions to meet compliance training requirements for Cal/OSHA, Canada OHS, DOT, HAZMAT, FEEOC, EPA, HAZWOPER, HIPAA, IATA, IMO, MSHA and OSHA.

- Flexible, Self-Paced Online Courses – Train anytime, anywhere
- Certificates and Wallet Cards – Print after successful course completion
- Comprehensive Compliance Management – Track company-wide training easily
- Trusted by 31,600+ Organizations Worldwide – Including businesses, government agencies, and universities

SELECT YOUR COURSE

Trustpilot
TrustScore 4.6 2,822 reviews

HAZMAT TRAINING VIEW COURSES

IATA DGR TRAINING VIEW COURSES

MSHA TRAINING VIEW COURSES

OSHA TRAINING VIEW COURSES

Chat

Enter your Email Address and Password, then click Login.

CTO COMPLIANCE TRAINING ONLINE

Live Chat

Login

Username or Email [Forgot your username?](#)

Password [Forgot your password?](#)

Log In

If you haven't accessed your account since **MONTH Xst, 2023**, you'll need to take a few simple steps to update your account.

Register on New Platform

Have questions or not sure? Visit [FAQs](#) or [Support](#) if you need any assistance!

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.

Home

Personal Information

Order History

Dashboard

Welcome, Rana

Manage Learners -

Add Users

Enroll Users

FREE Courses

Shop

Get Help

My Learning Center

Go to Courses

Print Certificates

Chat

OR

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

LOGIN

Please enter your Username and Password below.

Username:

Password:

[FORGOT?](#) [LOGIN](#)

STEP 3 GUIDED TOUR

You may choose to step through tutorials or click CONTINUE.

GUIDED TOUR

Would you like to take a guided tour of the Learning Management System? Select the box below to view the guided tour.

Don't show this message again

[Alert Notification](#) [Manager Report](#) [Learner Mode](#) [Manager Mode](#)

[CONTINUE](#)

HIPAA Exams [LOG OUT](#)

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.

Manage Users

Search and manage users within your organization. Click the Search button to look for a user from search options. Click on a name to edit the user's profile and preferences.

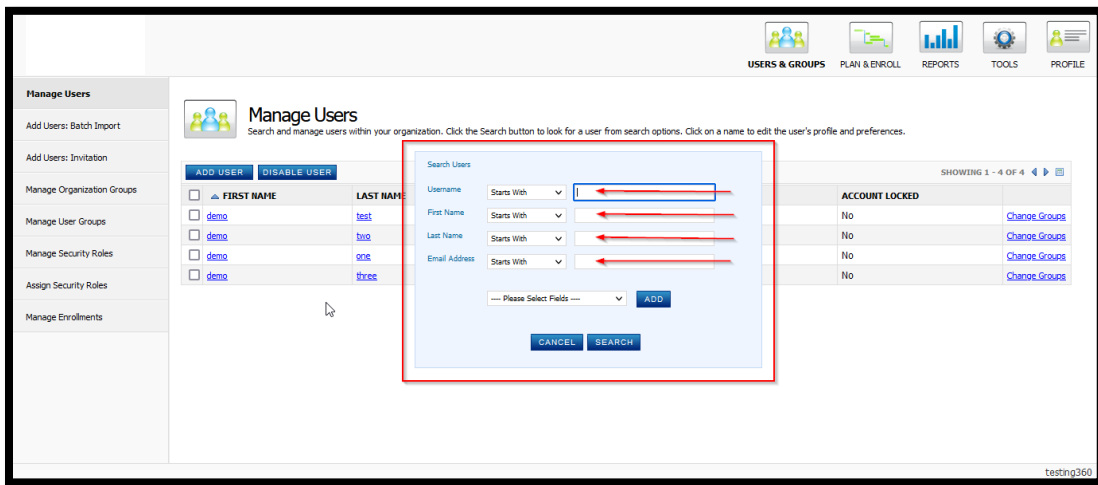
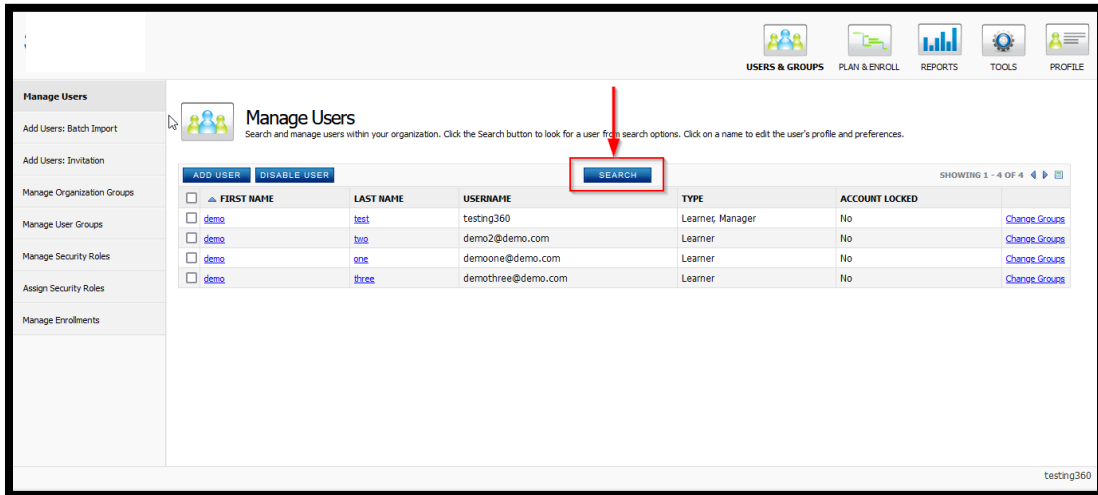
[ADD USER](#) [DISABLE USER](#) [SEARCH](#)

<input type="checkbox"/>	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED	
<input type="checkbox"/>	demo	test	testing360	Learner, Manager	No	Change Groups
<input type="checkbox"/>	demo	two	demo2@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	one	demoone@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	three	demothree@demo.com	Learner	No	Change Groups

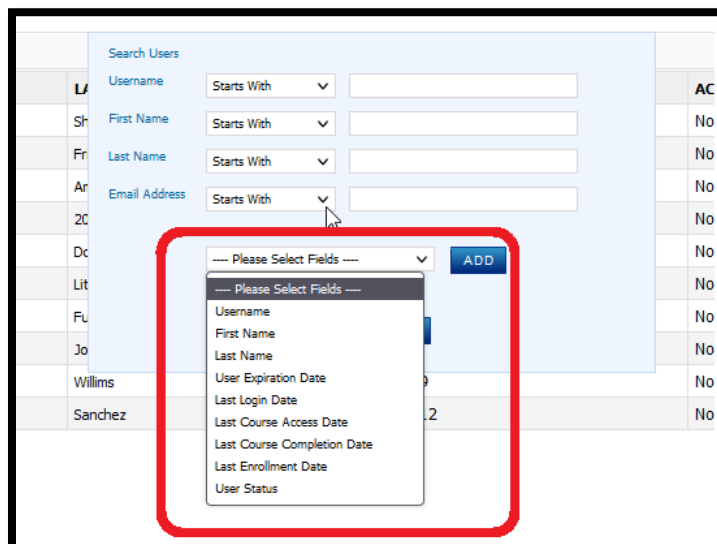
SHOWING 1 - 4 OF 4

testng360

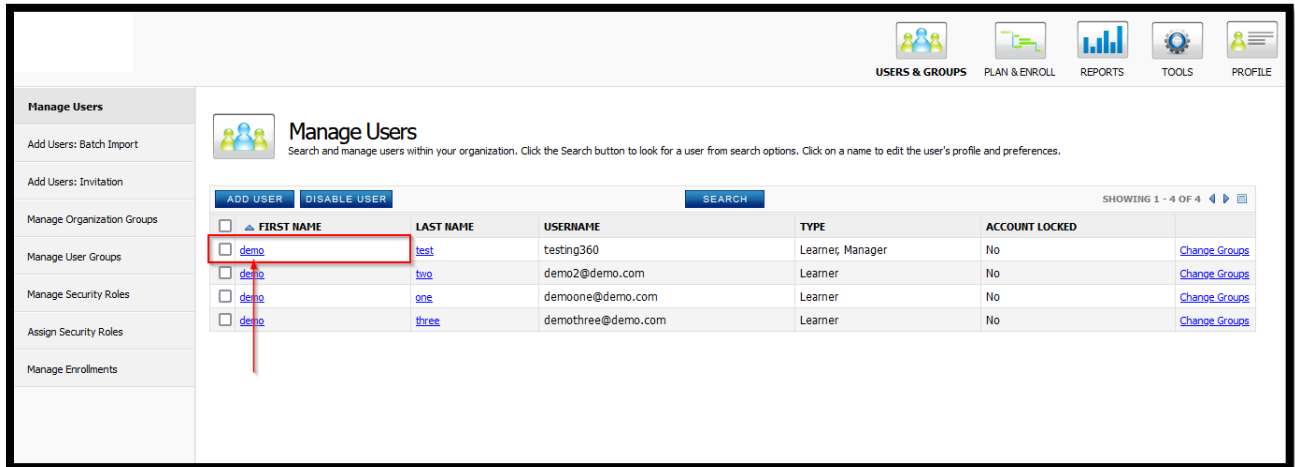
Click the SEARCH button to search by username, first name, last name, or email address.



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.

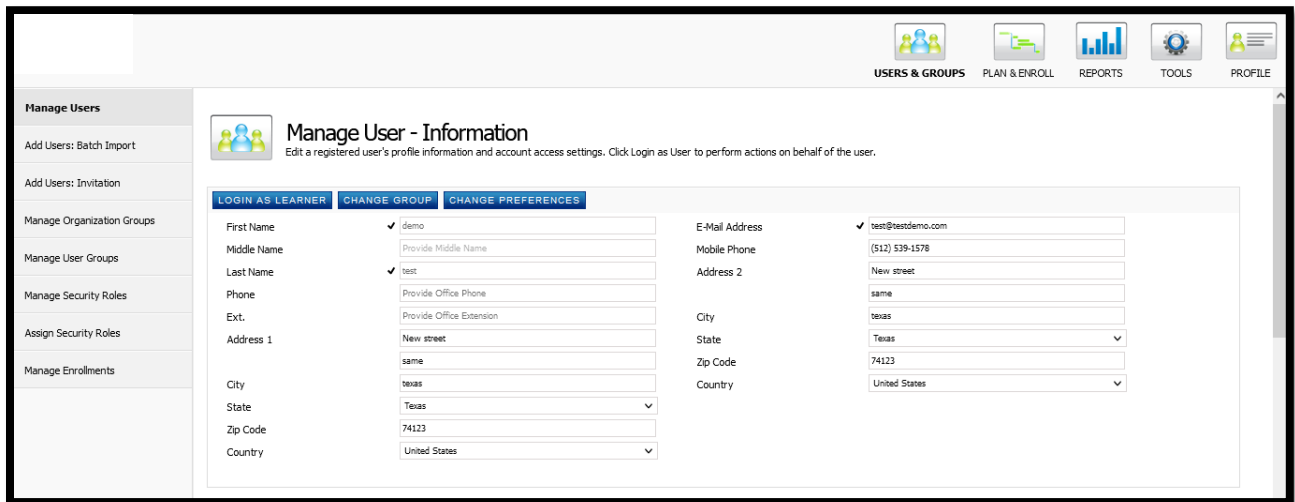


Click the first name of a user to view their user details.



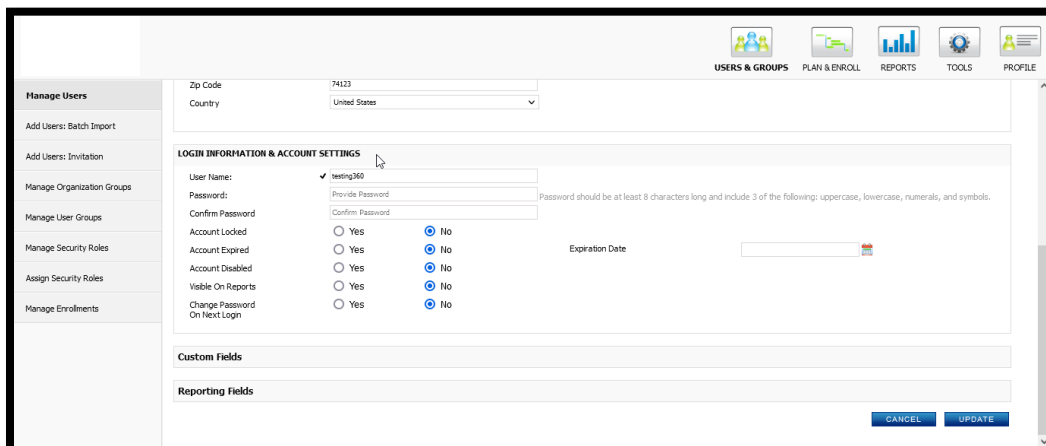
This opens the user profile page.

NOTE: You can edit all user details, including password, except for username.

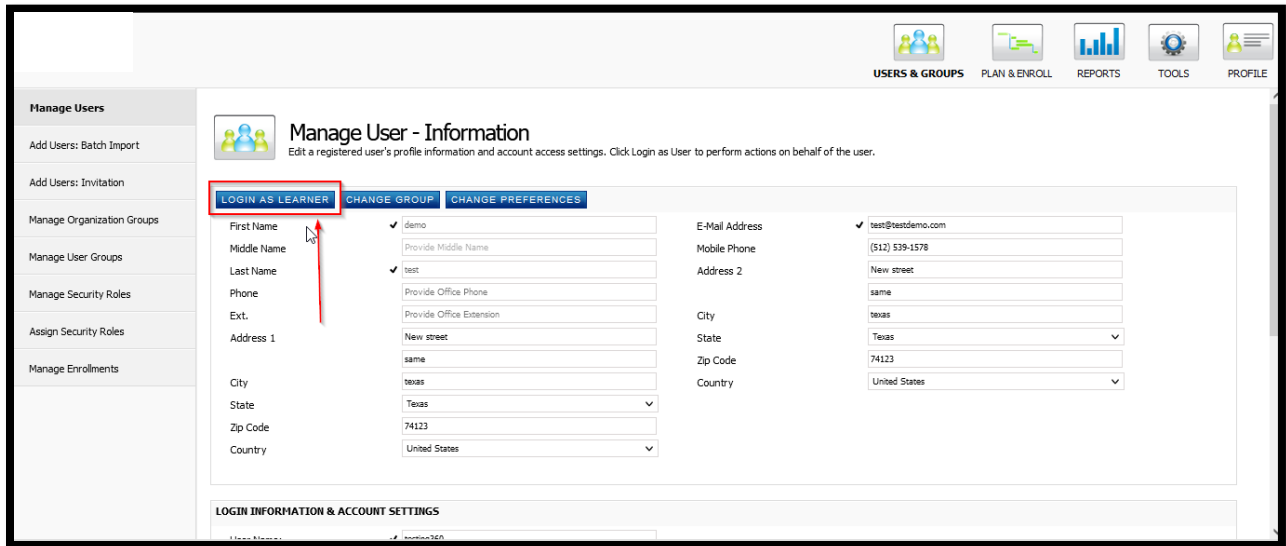


You also have the option to lock, expire or disable a user account by clicking the YES or NO option.

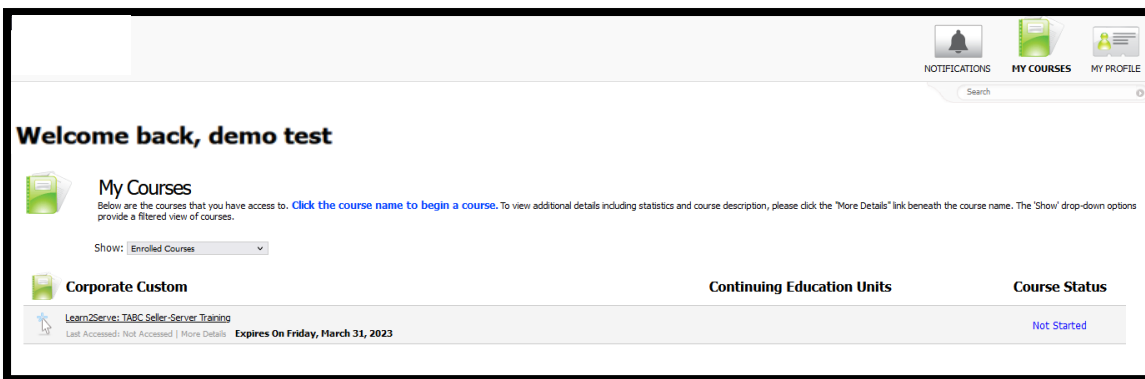
* NO is selected by default.



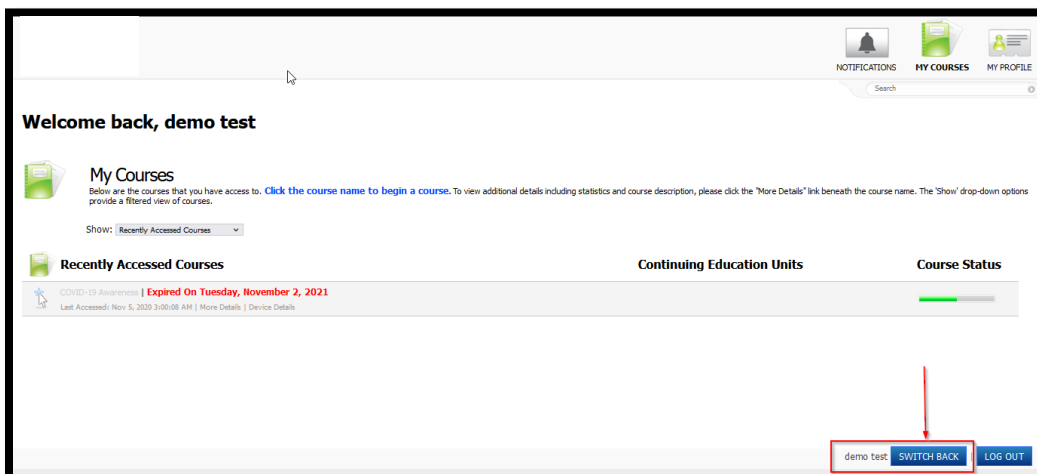
Click the LOGIN AS LEARNER button to access course completion records.



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.

Manage Users

- Add Users: Batch Import**
- Add Users: Invitation
- Manage Organization Groups
- Manage User Groups
- Manage Security Roles
- Assign Security Roles
- Manage Enrollments

Add Users: Batch Import

Use the batch import tool to create or update user accounts. Click on the Sample File link below to open a CSV template. Open the template in a spreadsheet or database program and fill in the users you wish to import. Duplicates will be detected if the user has the same email address.

IMPORT SETTINGS

Import File **BROWSE**

Note
Maximum 10000 records can be uploaded

File Delimiter
comma(,)

Account Locked
 Yes No

Accounts Visible in Reports
 Yes No

Duplicate Records
 Ignore Update

Send Email Registration
 Yes No

Change Password on Next Login
 Yes No

Sample File [Click here for a sample import file](#)

Password should be at least 8 characters long and include 3 of the following: uppercase, lowercase, numerals, and symbols.

IMPORT

Sample Import file view

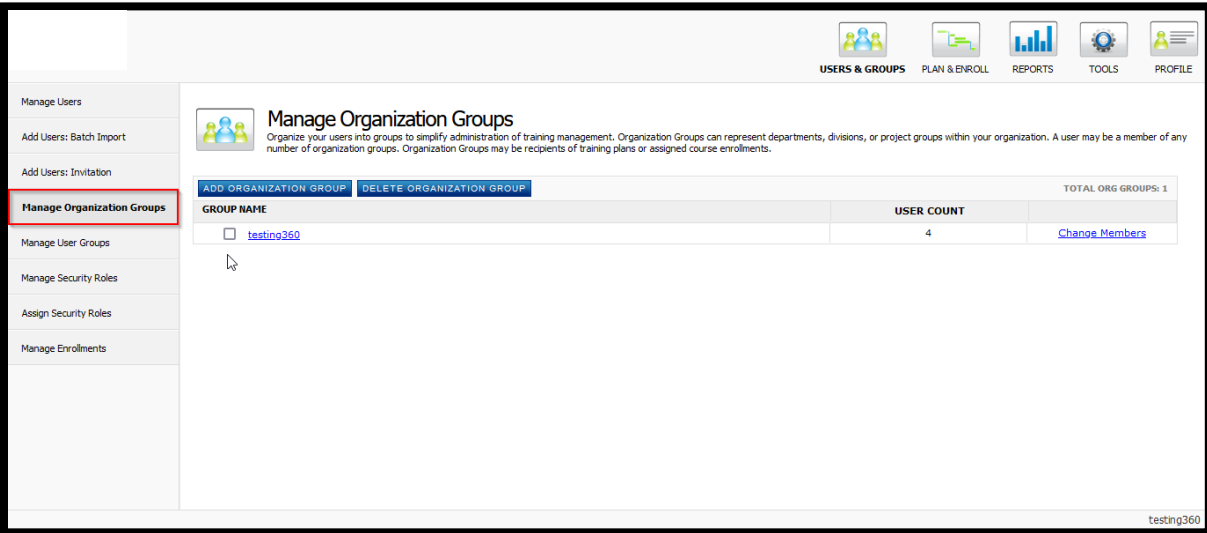
1	First Name	Middle Name	Last Name	Office Phc	Office Phc	Phone	Home Adc	Home Adc	City	State	Zip	Country	Email Add	Password	User Grou	Organizati	User Name
2	Joe		Learner							TX		United Sts	Joe.Learner	eLearning1#		Company:	Joe.Learner@company.com
3																	
4																	
5																	
6																	
7																	
8																	
9																	
10																	
11																	
12																	
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17																	
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19																	
20																	
21																	
22																	
23																	

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

STEP 6

MANAGE ORGANIZATION GROUP

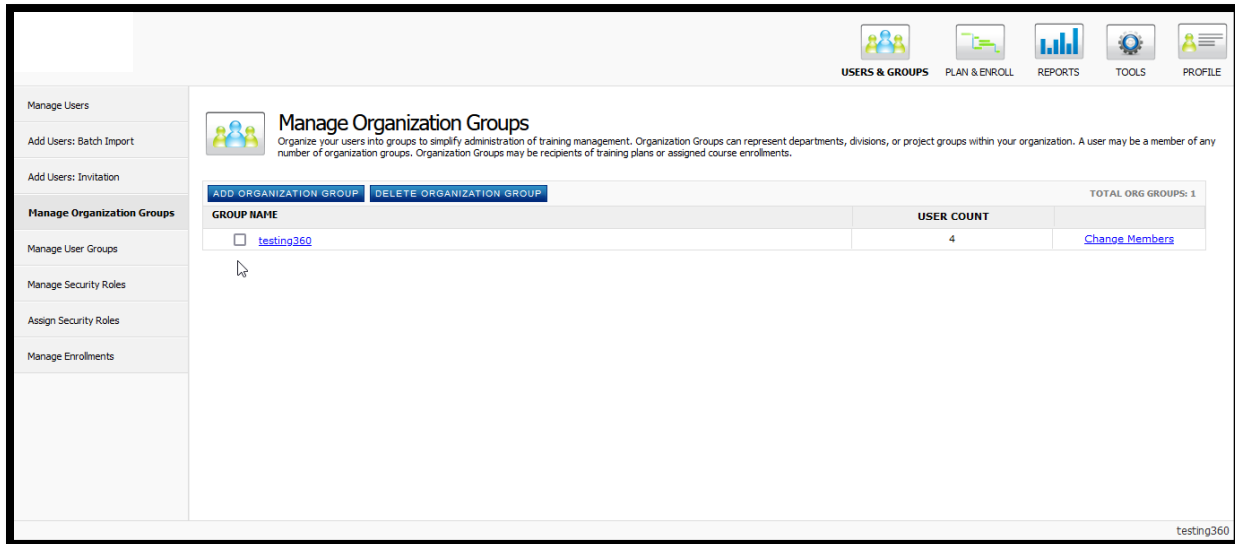
Click MANAGE ORGANIZATION GROUPS on the top left-hand side of the screen.



The screenshot shows the 'Manage Organization Groups' page. The left sidebar contains a menu with the following items: 'Manage Users', 'Add Users: Batch Import', 'Add Users: Invitation', 'Manage Organization Groups' (highlighted with a red box), 'Manage User Groups', 'Manage Security Roles', 'Assign Security Roles', and 'Manage Enrollments'. The main content area has a header with 'Manage Organization Groups' and a sub-header with 'ADD ORGANIZATION GROUP' and 'DELETE ORGANIZATION GROUP' buttons. Below this is a table with columns 'GROUP NAME', 'USER COUNT', and 'TOTAL ORG GROUPS: 1'. The table contains one row with the group name 'testing360', a user count of 4, and a 'Change Members' link. A mouse cursor is pointing at the 'testing360' link.

GROUP NAME	USER COUNT	TOTAL ORG GROUPS: 1
<input type="checkbox"/> testing360	4	Change Members

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



This screenshot is identical to the previous one, but the 'testing360' link in the table is highlighted with a blue selection bar, indicating it has been clicked. The mouse cursor is now positioned over the 'Change Members' link.

GROUP NAME	USER COUNT	TOTAL ORG GROUPS: 1
<input type="checkbox"/> testing360	4	Change Members

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

Manage Organization Groups

Organize your users into groups to simplify administration of training management. Organization Groups can represent departments, divisions, or project groups within your organization. A user may be a member of any number of organization groups. Organization Groups may be recipients of training plans or assigned course enrollments.

ADD ORGANIZATION GROUP DELETE ORGANIZATION GROUP TOTAL ORG GROUPS: 1

GROUP NAME	USER COUNT	
<input type="checkbox"/> testing360	4	Change Members

testing360

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

Manage Organization Group Members

Use the Add Member and Delete Member buttons to manage the member users of the Organization Group.

testing360

ADD MEMBER DELETE MEMBER SHOWING 1 - 4 OF 4

	FIRST NAME	LAST NAME	USER NAME	ACCOUNT LOCKED
<input type="checkbox"/>	de	test	testing360	No
<input type="checkbox"/>	de	one	demoone@demo.com	No
<input type="checkbox"/>	demo	three	demothree@demo.com	No
<input type="checkbox"/>	demo	two	demo2@demo.com	No

BACK TO ORG GROUP

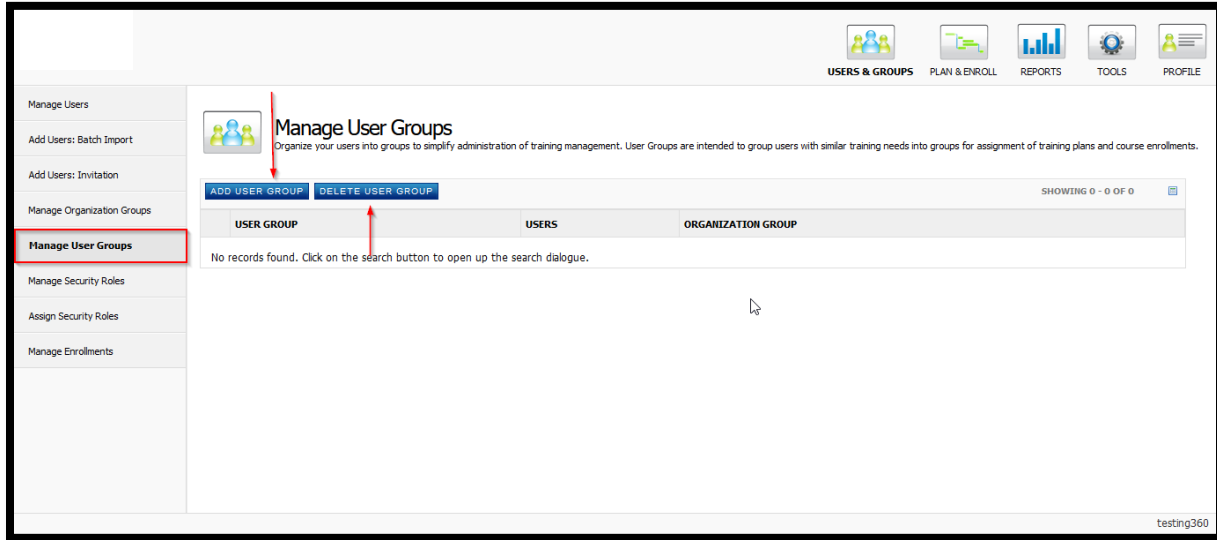
testing360

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.

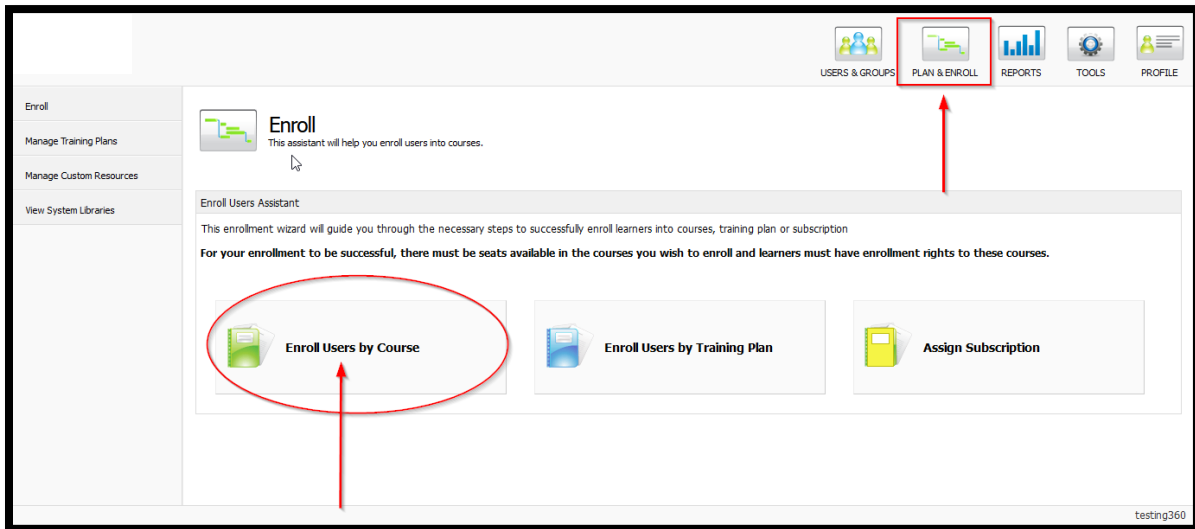
There are two options available: ADD USER GROUP or DELETE USER GROUP.



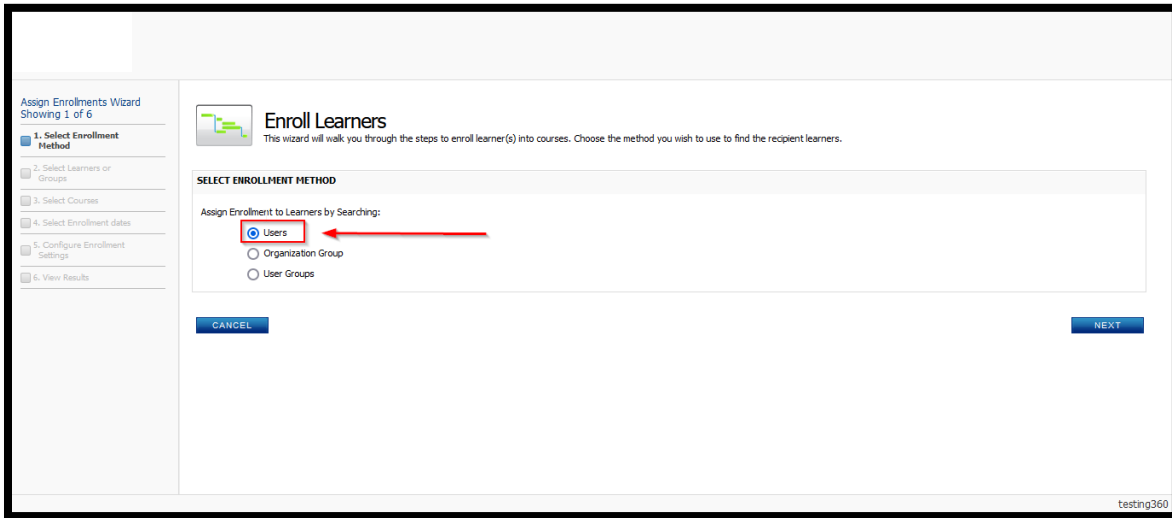
STEP 8

PLAN & ENROLL

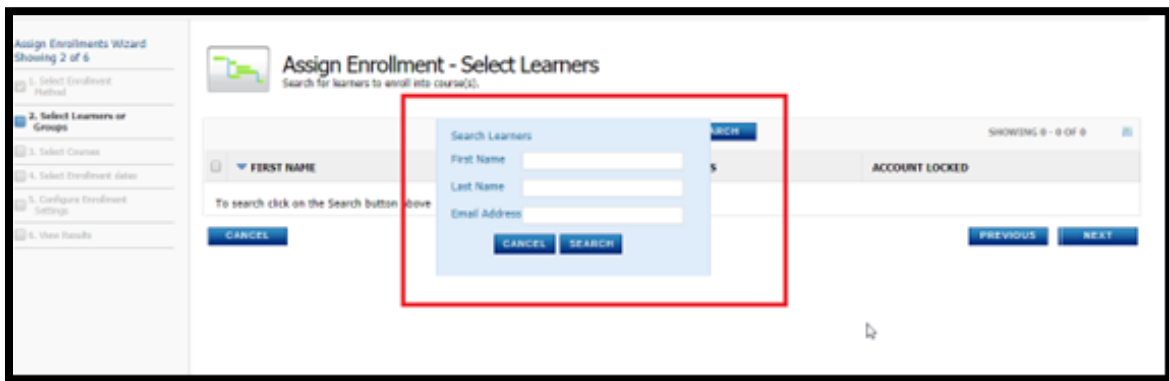
Select ENROLL USERS BY COURSE



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.

Assign Enrollment - Select Learners
Search for learners to enroll into course(s).

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL ADDRESS	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	test@testdemo.com	No
<input type="checkbox"/>	demo	two	demo2@demo.com	No
<input type="checkbox"/>	demo	one	demoone@demo.com	No
<input type="checkbox"/>	demo	three	demothree@demo.com	No

testing360

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

Assign Enrollment - Select Courses
Select the courses you wish to enroll learners into.

Search Courses

Course Name

Contract Name

Business Key

Max Expiration Date

<input type="checkbox"/>	COURSE NAME	BUSINESS KEY	SEATS	USED	REMAINING	EXP. DATE	SUBSCRIPTION
No records found. Click on the search button to open the search modal.							

testing360

Select the desired course from the results.

Assign Enrollment - Select Courses
Select the courses you wish to enroll learners into.

SEARCH

SHOWING 1 - 2 OF 2

COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	TOTAL SEATS	USED	REMAINING	EXP. DATE	SUBSCRIPTION
<input type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALTX0417078	Food and Beverage Programs->Food Handler Training->Texas	DEMO for 360 Training - Unlimited	0	Unlimited	02/29/2024	
<input type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALTX0417078	E-Commerce->Food and Beverage Programs->Food Handler Training	DEMO for 360 Training - Unlimited	0	Unlimited	02/29/2024	

CANCEL PREVIOUS NEXT

testing360

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.

Assign Enrollment - Duration of Enrollments
The course start and end date specify when learners can access the course. You can drag and drop courses in the order it should display to your learners.

ALL COURSES

Start Date

End Date

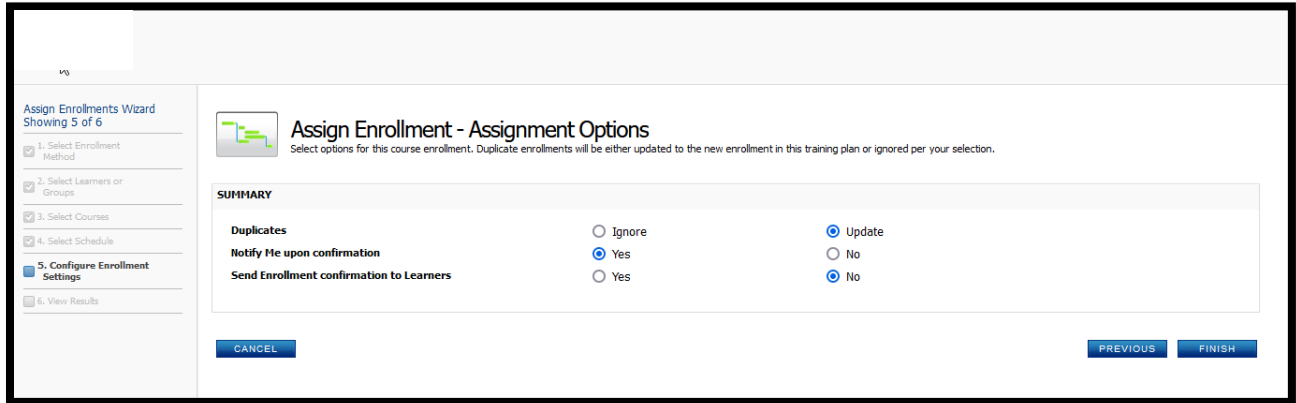
INDIVIDUAL COURSES

	Start Date	End Date	Contract End Date
Learn2Serve: TABC Seller-Server Training	<input type="text"/>	<input type="text"/>	02/29/2024

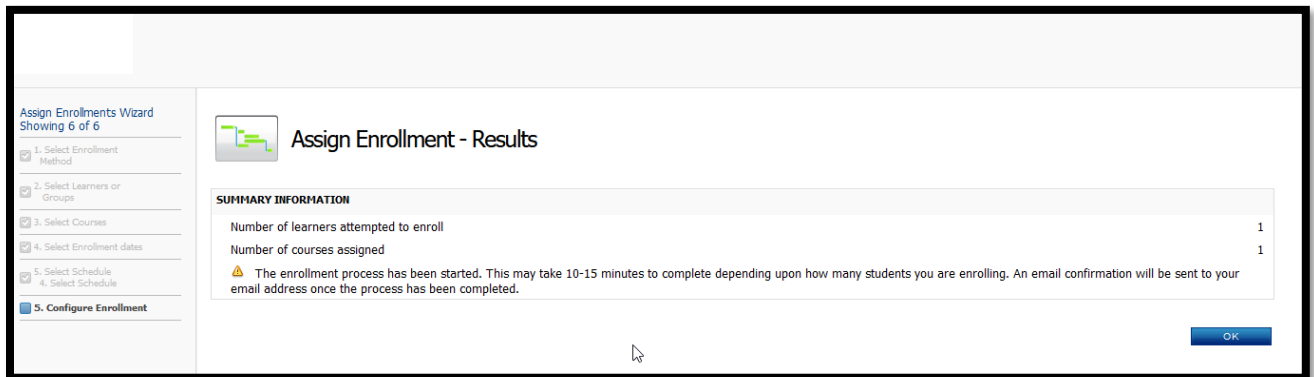
CANCEL PREVIOUS NEXT

testing360

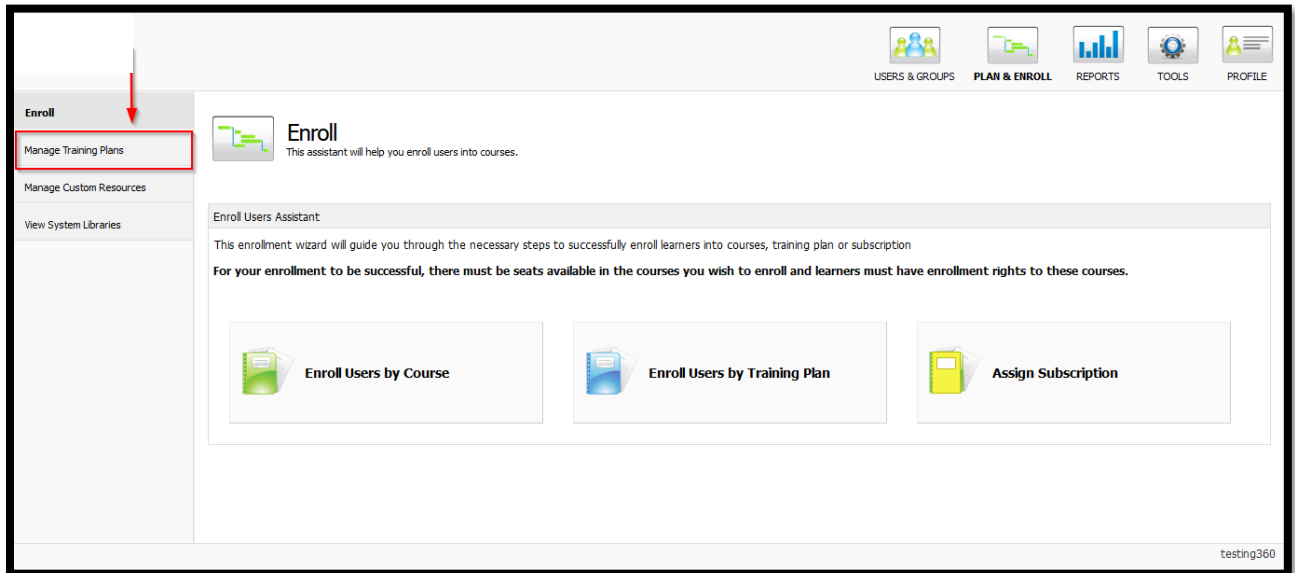
On the final screen of the training plan assignment, you can choose to Send Enrollment Confirmation to Learner by choosing YES. Click FINISH to complete the enrollment. You must click FINISH to ensure the course(s) is assigned.



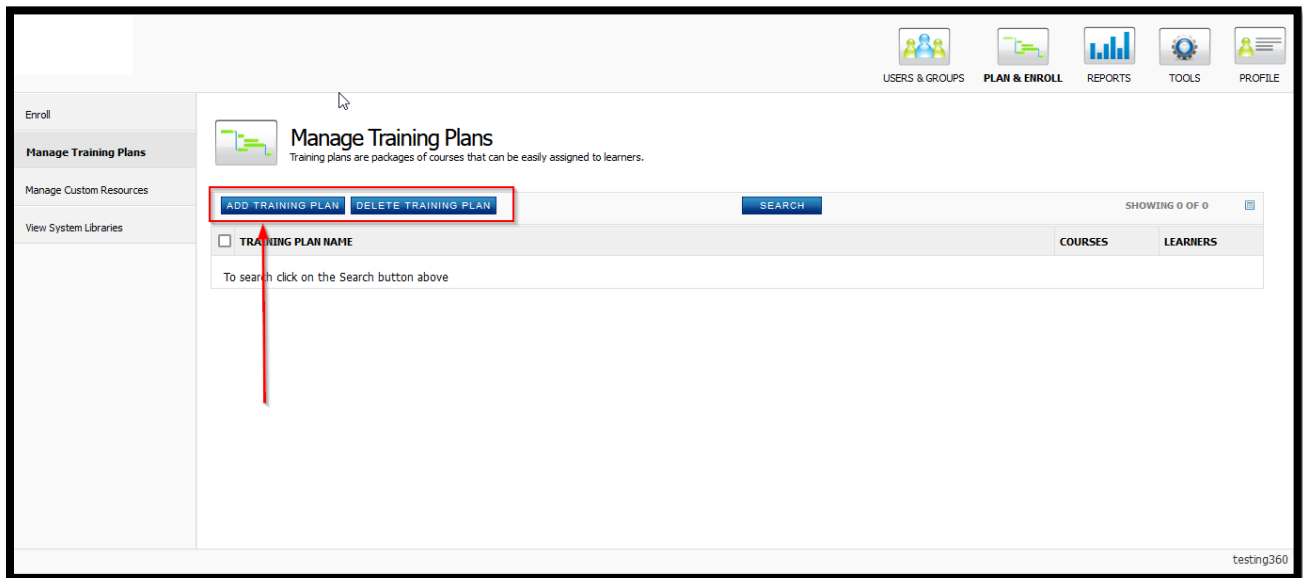
Once you've clicked "finish," you will see a confirmation screen confirming the enrollment was successful.



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**. Click the **Next** button to proceed.

The screenshot shows the 'Add Training Plan' wizard at step 1 of 3. The main area is titled 'Add Training Plan' with the instruction 'Fill out the basic information of the new training plan and click the Next button to proceed.' Below this is a 'SUMMARY' section with two text input fields: 'Training Plan Name' and 'Description'. Both fields contain the text 'DEMO TRAINING'. A red rectangular box highlights both input fields. At the bottom right of the main area, a red arrow points down to a blue 'NEXT' button. A blue 'CANCEL' button is located at the bottom left. The left sidebar shows the wizard progress: '1. Training Plan Summary' (selected), '2. Selected Courses', and '3. Confirmation'. The top navigation bar includes icons for 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The footer of the page contains the text 'testing360'.

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

The screenshot shows the 'Add Training Plan' wizard at step 2 of 3. The main area is titled 'Add Training Plan' with the instruction 'Select Course(s) to add to Training Plan.' Below this is a 'COURSES' section with a search dialog box open. The dialog box has four input fields: 'Course Name', 'Contract Name', 'Business Key', and 'Max Expiration Date'. A red arrow points to a blue 'SEARCH' button in the dialog. The main area also has a blue 'SEARCH' button and a table with columns: 'BUSINESS KEY', 'COURSE DESCRIPTION', 'EXPIRATION DATE', and 'CONTRACT NAME'. The table is currently empty. At the bottom right of the main area, there are blue 'PREVIOUS' and 'NEXT' buttons. The left sidebar shows the wizard progress: '1. Training Plan Summary' and '2. Selected Courses' (selected). The top navigation bar and footer are the same as in the previous screenshot.

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.

Add Training Plan
Select Course(s) to add to Training Plan.

COURSES SEARCH SHOWING 1 - 2 OF 2

<input checked="" type="checkbox"/>	COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	EXPIRATION DATE	CONTRACT NAME
<input checked="" type="checkbox"/>	Aprender a servir: Capacitación de TABC para vendedores/camareros	PSALT0513050	Food and Beverage Programs->Food Handler Training->Texas	02/29/2024	DEMO for 360Training
<input checked="" type="checkbox"/>	Learn2Serve: TABC Seller-Server Training	PSALT0417078	Food and Beverage Programs->Food Handler Training->Texas	02/29/2024	DEMO for 360Training

CANCEL **PREVIOUS** **NEXT**

testing360

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.

Add Training Plan
Training Plan enrollment has been made. Below is a summary of the contracts used in the bulk enrollment process.

SUMMARY

Training Plan Name DEMO TRAINING

Description DEMO TRAINING

COURSES

Course Names
Aprender a servir: Capacitación de TABC para vendedores/camareros
Learn2Serve: TABC Seller-Server Training

CANCEL **PREVIOUS** **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.

Enroll

Manage Training Plans

Manage Custom Resources

View System Libraries

ADD TRAINING PLAN DELETE TRAINING PLAN SEARCH

SHOWING 1 OF 1

TRAINING PLAN NAME	COURSES	LEARNERS
DEMO TRAINING	2	0

testing360

Select ENROLL USERS BY TRAINING PLAN

Enroll

Enroll

This assistant will help you enroll users into courses.

Enroll Users Assistant

This enrollment wizard will guide you through the necessary steps to successfully enroll learners into courses, training plan or subscription

For your enrollment to be successful, there must be seats available in the courses you wish to enroll and learners must have enrollment rights to these courses.

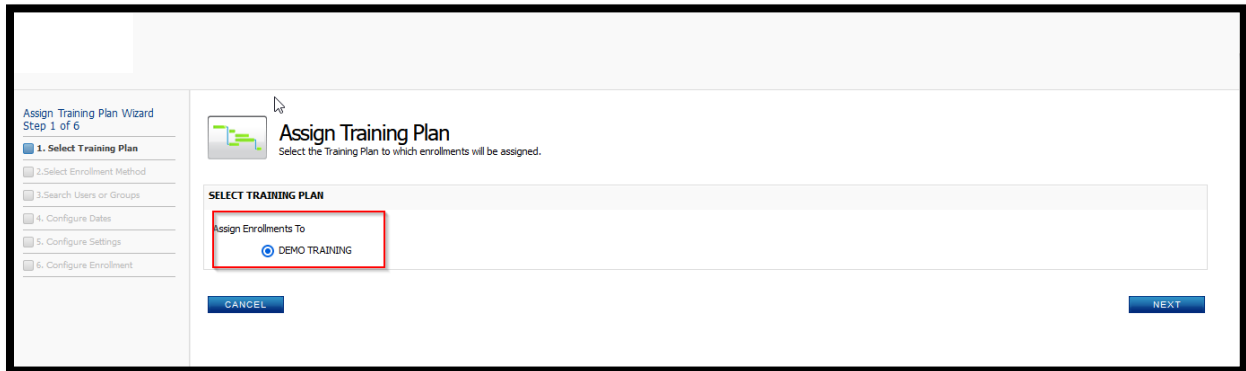
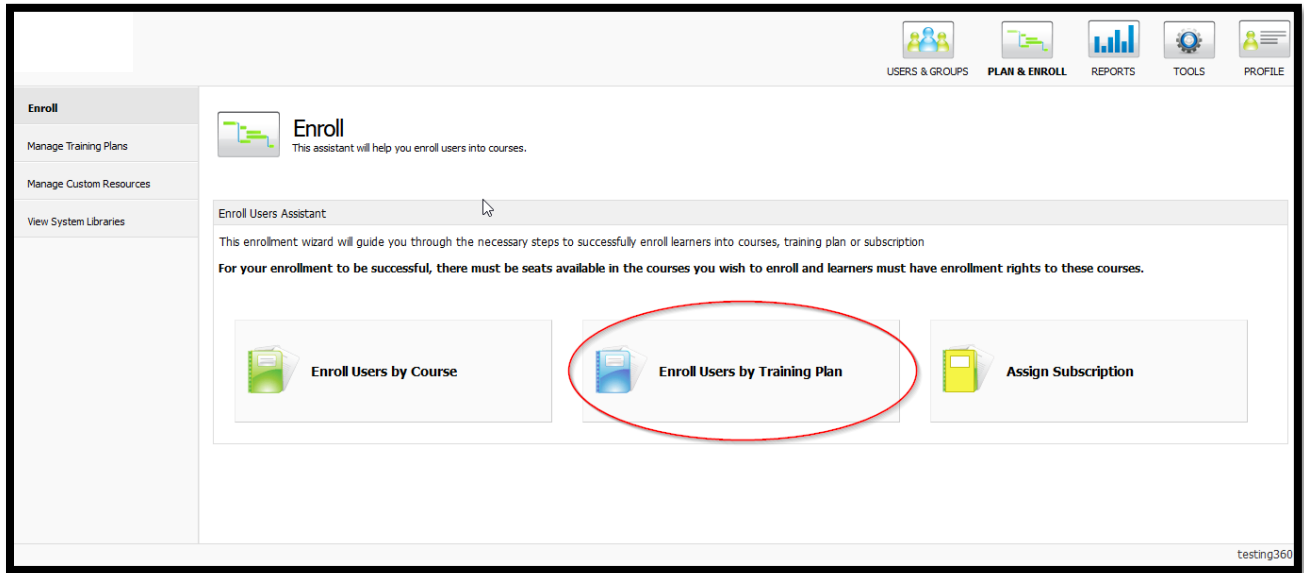
Enroll Users by Course

Enroll Users by Training Plan

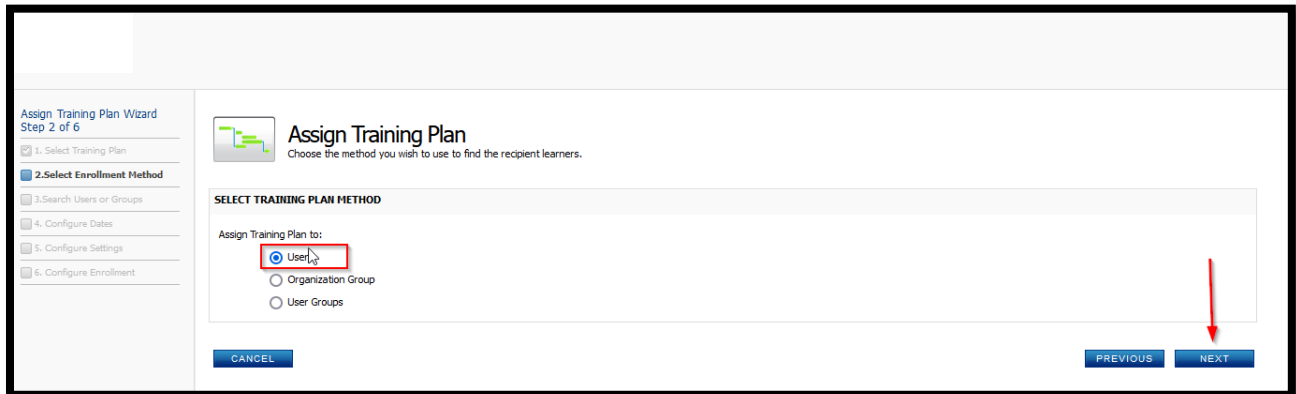
Assign Subscription

testing360

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

Assign Training Plan Wizard
Step 3 of 6

- 1. Select Training Plan
- 2. Select Enrollment Method
- 3. Search Users or Groups
- 4. Configure Dates
- 5. Configure Settings
- 6. Configure Enrollments

Assign Training Plan - Select Learners

Search for learners to enroll into course(s).

SEARCH

SHOWING 1 - 1 OF 1

<input type="checkbox"/>	FIRST NAME	LAST NAME	USER NAME	SECURITY ROLE	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	LEARNER	No

CANCEL PREVIOUS NEXT

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

Assign Training Plan Wizard
Step 4 of 6

- 1. Select Training Plan
- 2. Select Enrollment Method
- 3. Search Users or Groups
- 4. Configure Dates
- 5. Configure Settings
- 6. Configure Enrollments

Assign Training Plan - Duration

Select the Start Date and End Date of your training plan. You can drag and drop courses in the order it should display to your learners.

SELECT DATES

Start Date → 03/01/2023

End Date → 03/15/2023

TRAINING PLAN COURSES	CONTRACT NAME	EXPIRATION DATE
↕ Aprender a servir: Capacitación de TABC para vendedores/camareros	DEMO for 360Training	02/29/2024
↕ Learn2Serve: TABC Seller-Server Training	DEMO for 360Training	02/29/2024

CANCEL PREVIOUS NEXT

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.

LMS Enrollment Results

360training.com Support <support@360training.com>
To: Rana Awais Javed

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

This Message originated outside your organization.

Assign Enrollment - Results

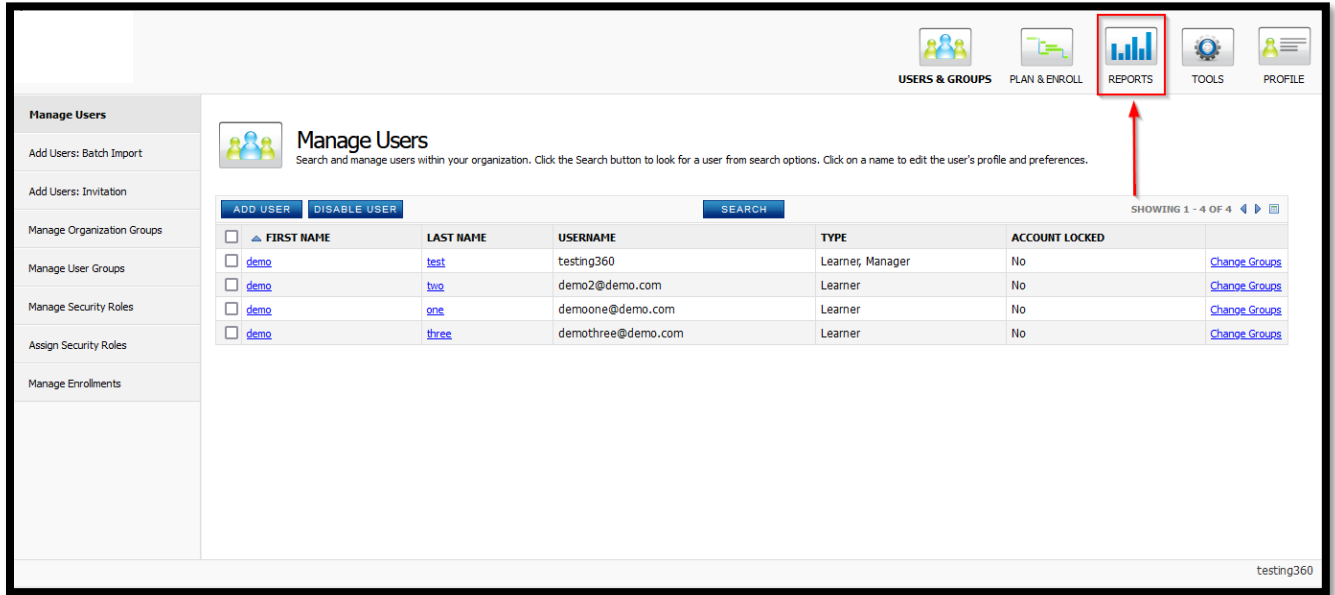
The enrollment process has been completed. Below is a summary of assignments.

Summary Information	
Number of learners attempted to enroll	1
Number of learners enrolled successfully	0
Number of courses assigned	0
Total number of enrollments created	0
Number of errors encountered	0

STEP 9

REPORTS – Tracking progress via On-Demand Reports

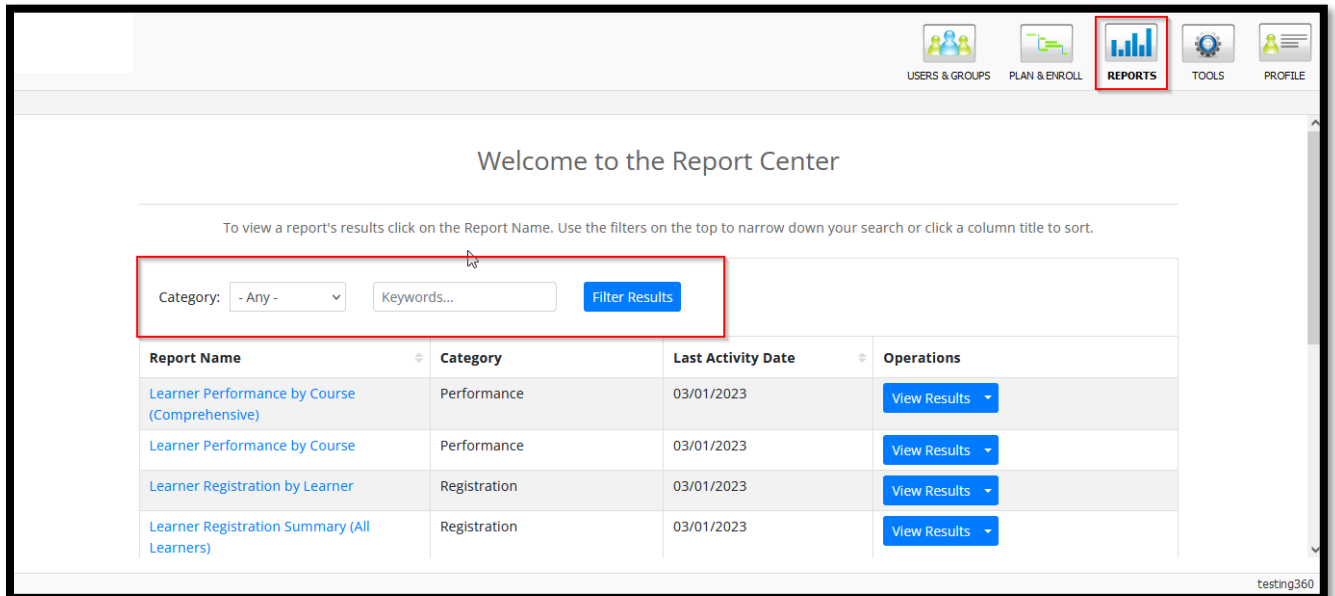
Once logged in, select REPORTS in the top right corner of the screen.



The screenshot shows the 'Manage Users' interface. In the top right navigation bar, the 'REPORTS' icon (a bar chart) is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'Manage Users' section is visible, featuring a search bar and a table of users. The table has columns for 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. The 'REPORTS' menu item is highlighted in the top navigation bar.

	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED	
<input type="checkbox"/>	demo	test	testing360	Learner, Manager	No	Change Groups
<input type="checkbox"/>	demo	two	demo2@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	one	demoone@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	three	demothree@demo.com	Learner	No	Change Groups

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



The screenshot shows the 'Report Center' page. The 'REPORTS' menu item in the top navigation bar is highlighted with a red box. Below the navigation bar, the 'Report Center' section is visible, featuring a search bar and a table of reports. The search bar has a 'Category' dropdown menu set to '- Any -', a 'Keywords...' input field, and a 'Filter Results' button. The table has columns for 'Report Name', 'Category', 'Last Activity Date', and 'Operations'. The 'REPORTS' menu item is highlighted in the top navigation bar.

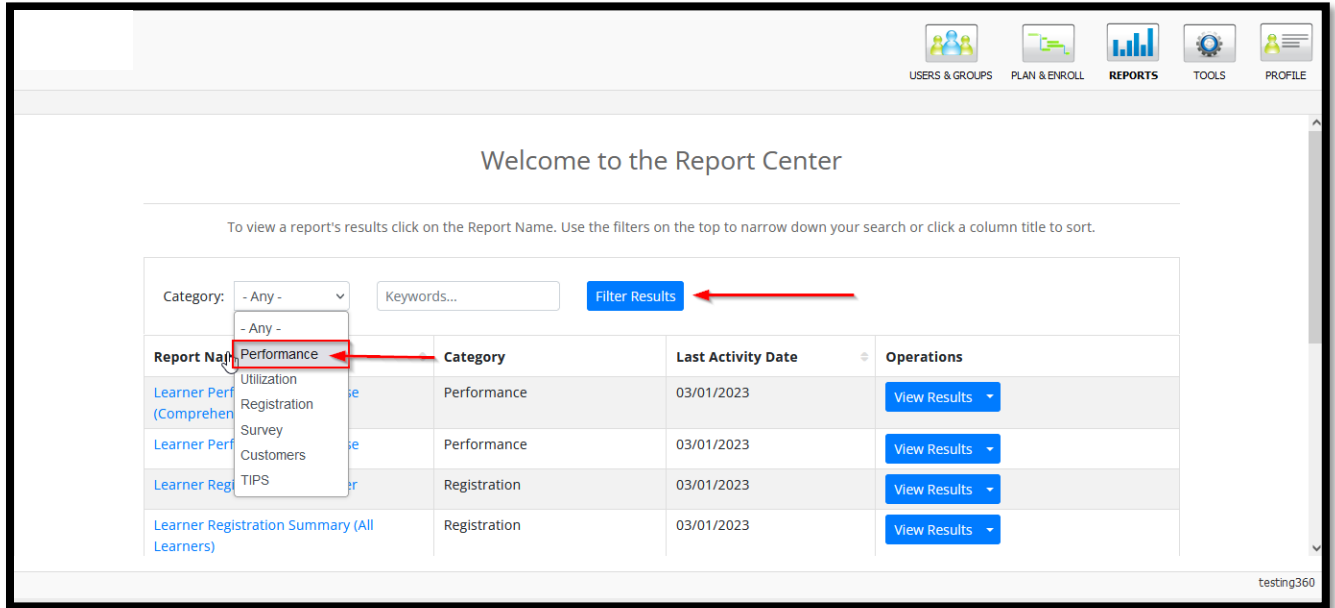
Welcome to the Report Center

To view a report's results click on the Report Name. Use the filters on the top to narrow down your search or click a column title to sort.

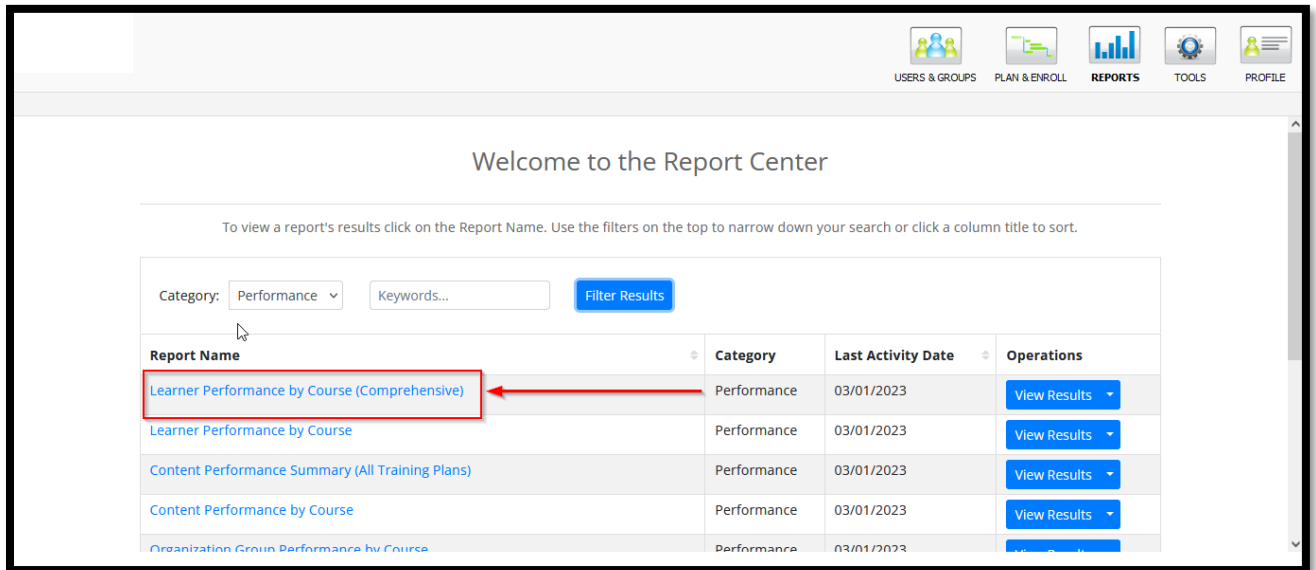
Category: - Any - [Filter Results](#)

Report Name	Category	Last Activity Date	Operations
Learner Performance by Course (Comprehensive)	Performance	03/01/2023	View Results
Learner Performance by Course	Performance	03/01/2023	View Results
Learner Registration by Learner	Registration	03/01/2023	View Results
Learner Registration Summary (All Learners)	Registration	03/01/2023	View Results

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.

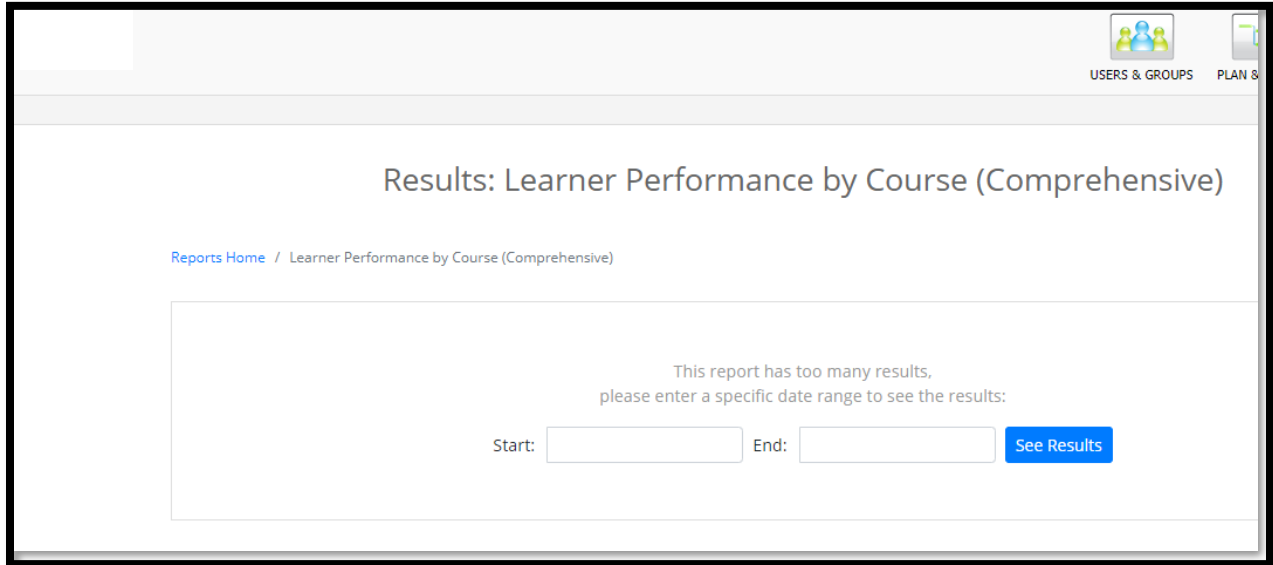


To run the report, click on the report name.

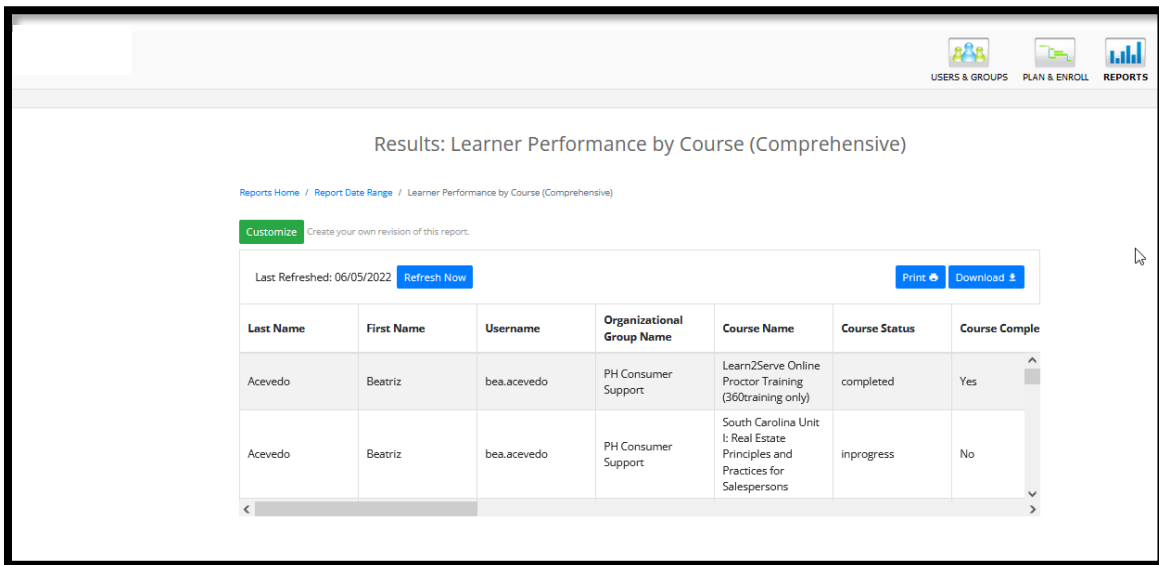


Select the date range you want the report to cover and click SEE RESULTS.

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.

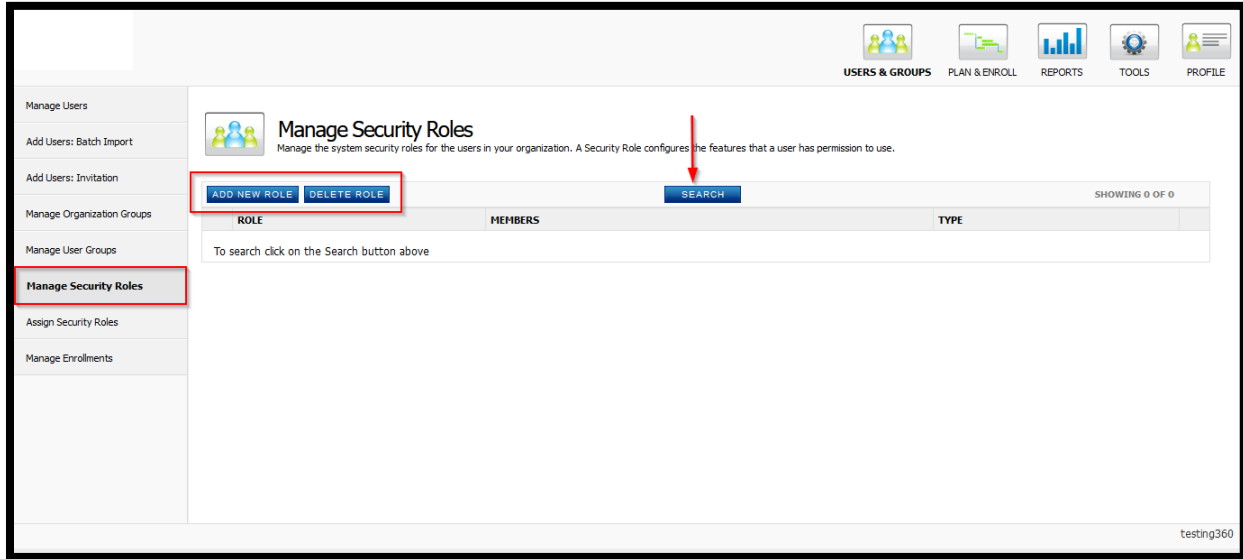


STEP 10

MANAGE SECURITY ROLES

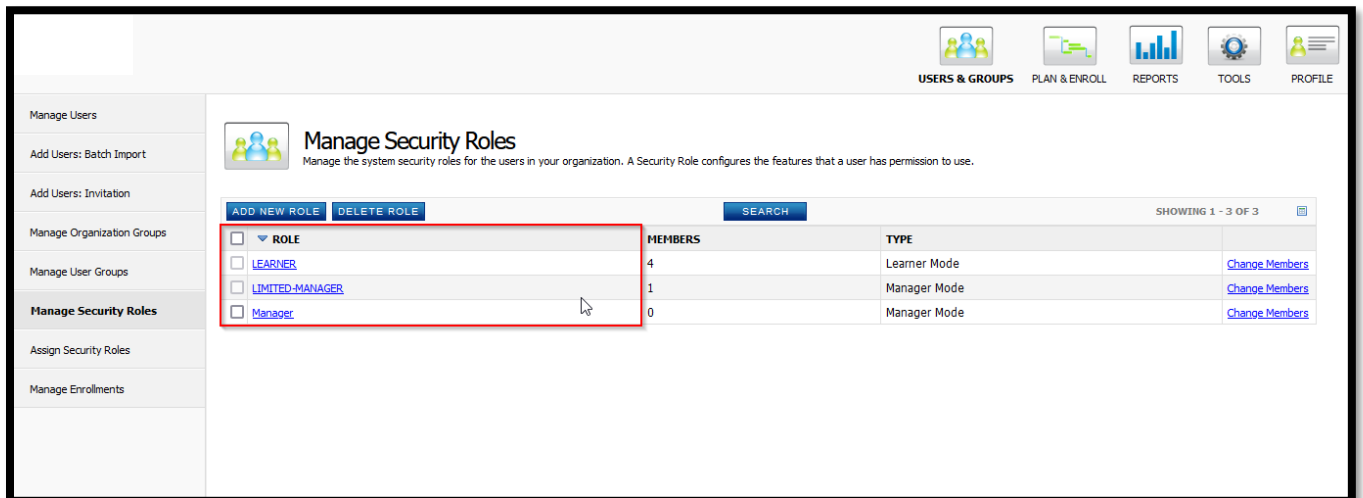
Manage the system security roles for the users in your organization. A Security Role configures the features that a user has permission to use.

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



The screenshot shows the 'Manage Security Roles' interface. The left sidebar contains a menu with 'Manage Security Roles' highlighted. The main content area has a header with 'Manage Security Roles' and a sub-header 'Manage the system security roles for the users in your organization. A Security Role configures the features that a user has permission to use.' Below this are three buttons: 'ADD NEW ROLE', 'DELETE ROLE', and 'SEARCH'. A red arrow points to the 'SEARCH' button. Below the buttons is a table with columns 'ROLE', 'MEMBERS', and 'TYPE'. The table is currently empty, with the text 'To search click on the Search button above' displayed. The top navigation bar includes icons for 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner shows the text 'testing360'.

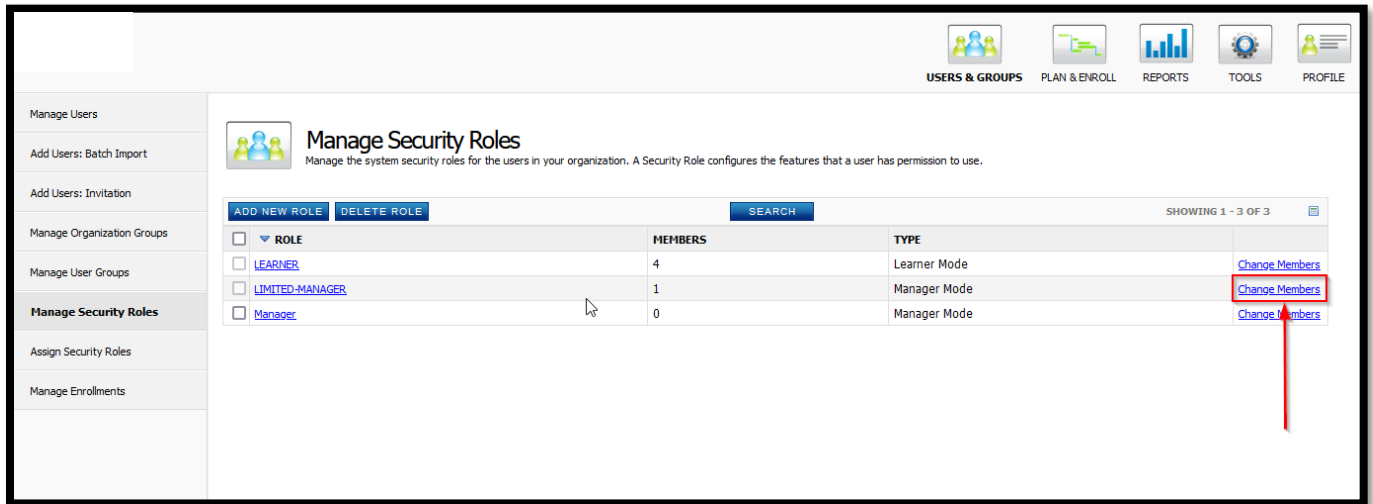
Manage the permission settings of a security role. Your organization may have one **default Learner Security Role** that all newly registered users will have as their Learner role by default.



The screenshot shows the 'Manage Security Roles' interface with a list of roles. The left sidebar contains a menu with 'Manage Security Roles' highlighted. The main content area has a header with 'Manage Security Roles' and a sub-header 'Manage the system security roles for the users in your organization. A Security Role configures the features that a user has permission to use.' Below this are three buttons: 'ADD NEW ROLE', 'DELETE ROLE', and 'SEARCH'. Below the buttons is a table with columns 'ROLE', 'MEMBERS', and 'TYPE'. The table contains three rows: 'LEARNER' (4 members, Learner Mode), 'LIMITED-MANAGER' (1 member, Manager Mode), and 'Manager' (0 members, Manager Mode). The 'LEARNER' row is highlighted with a red box. The top navigation bar includes icons for 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner shows the text 'testing360'.

ROLE	MEMBERS	TYPE
<input type="checkbox"/> LEARNER	4	Learner Mode
<input type="checkbox"/> LIMITED-MANAGER	1	Manager Mode
<input type="checkbox"/> Manager	0	Manager Mode

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.

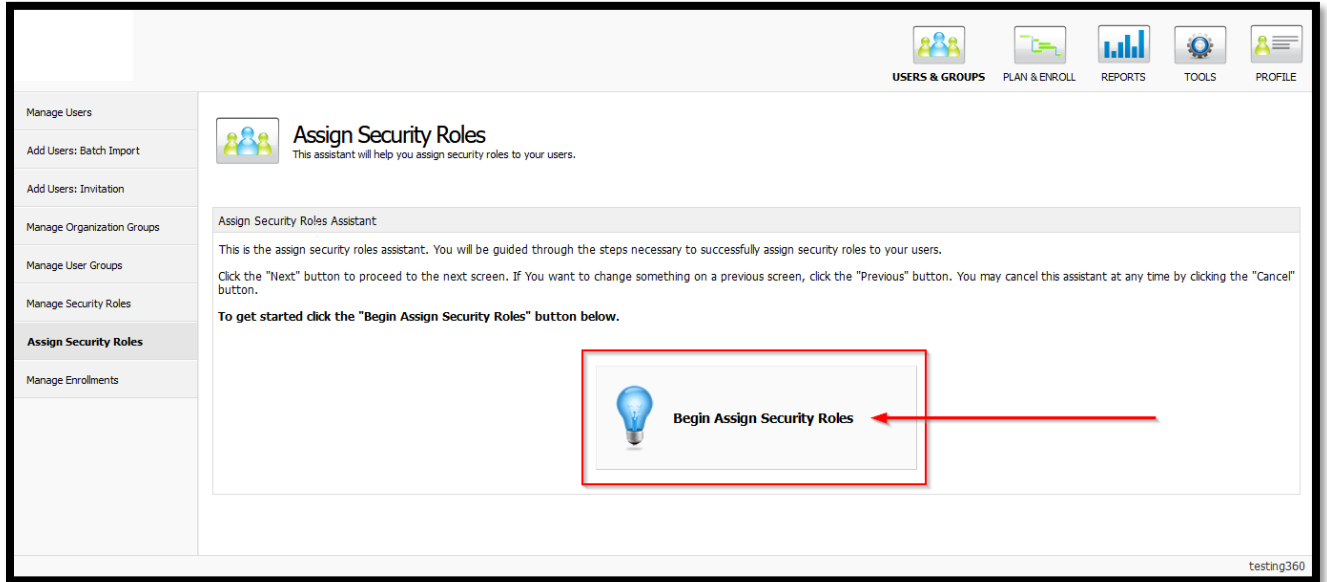


STEP 11

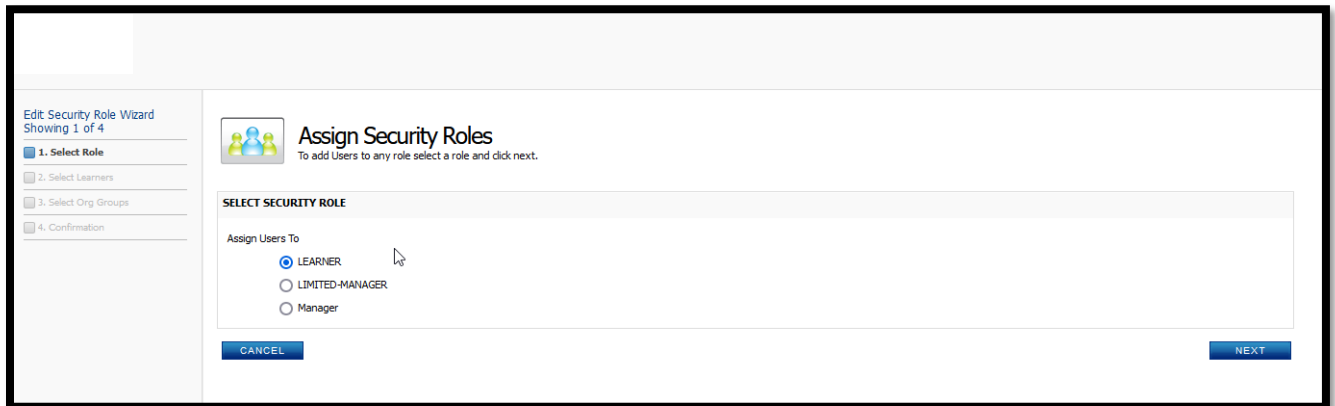
ASSIGN SECURITY ROLES

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.

Edit Security Role Wizard
Showing 2 of 4

- 1. Select Role
- 2. Select Learners**
- 3. Select Org Groups
- 4. Confirmation

Assign Security Roles
To add Users select any user and click next.

SEARCH

SHOWING 4 OF 4

<input type="checkbox"/>	FIRST NAME	LAST NAME	USER NAME	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	No
<input type="checkbox"/>	demo	two	demo2@demo.com	No
<input type="checkbox"/>	demo	one	demoone@demo.com	No
<input type="checkbox"/>	demo	three	demothree@demo.com	No

CANCEL PREVIOUS FINISH

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.

Add New User Wizard
showing 3 of 4

- 1. User Information
- 2. User Groups
- 3. Select Org Groups**
- 4. Confirmation

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

MANAGE ALL ORGANIZATIONAL GROUPS

Yes
 No

ORGANIZATION GROUP

testing360

CANCEL PREVIOUS FINISH

testing360

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.

The screenshot shows the 'Manage Enrollments' page. A search modal is open, allowing users to search by First Name, Last Name, or Email Address. The 'SEARCH' button in the modal is highlighted with a red arrow. The main table below the modal is currently empty, displaying 'No records found. Click on the search button to open records.' The 'Manage Enrollments' menu item in the left sidebar is also highlighted with a red box.

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

The screenshot shows the 'Manage Enrollments' page after a search. The search modal is closed, and a table of users is displayed. The 'VIEW ENROLLMENTS' link for the first user is highlighted with a red box and a red arrow. The 'Manage Enrollments' menu item in the left sidebar is also highlighted with a red box.

FIRST NAME	LAST NAME	USER NAME	ENROLLMENTS
demo	test	testing360	View Enrollments
demo	two	demo2@demo.com	View Enrollments
demo	one	demoone@demo.com	View Enrollments
demo	three	demothree@demo.com	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)

<input type="checkbox"/> COURSES	PROGRESS	STATUS	LOCK REASON	ENROLLMENT END DATE	CONTRACT END DATE
<input type="checkbox"/> COVID-19 Awareness	Expired	UnLocked	-	11/02/2021	11/02/2021

Profile

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

CUSTOMER PROFILE

Customer Name	390 Vendor Demo	Website URL	Provide Website URL
First Name	Vendor	Email Address	admin@390vendor.com
Last Name	Admin	Account Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Phone	Provide Phone Number	Address 1	Provide Street Address
Ext.	Provide Extension	Address 2	Provide Street Address
City	Provide Street Address	City	Provide City
State	Armed Forces Americas	State	Armed Forces Americas
Zip Code	Provide Zip/Postal Code	Zip Code	Provide Zip/Postal Code
Country	United States	Country	United States

CANCEL SAVE

Rana Demo | Manager Mode | LOG OUT

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.

Manage Users

Search and manage users within your organization. Click the Search button to look for a user from search options. Click on a name to edit the user's profile and preferences.

ADD USER DISABLE USER SEARCH

<input type="checkbox"/>	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED
<input type="checkbox"/>	Admin	User	admin@360training.com	Learner	No
<input type="checkbox"/>	Alt Admin	Alt Admin	altadmin@360training.com	Learner	No
<input type="checkbox"/>	Brenda	Keating	bkeating@360training.com	Learner	No
<input type="checkbox"/>	Charles	Webster	cwebster@360training.com	Learner	No
<input type="checkbox"/>	Clinton Kent	Clinton Kent	ckent@360training.com	Learner	No
<input type="checkbox"/>	DANIEL D	LOTT	dott@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No

SHOWING 1 - 10 OF 43

Rana Demo

Learner Mode
Manager Mode
Manager Mode

LOG OUT

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Email: support@360training.com