

Compliance Training Online (CTO) Platform

Limited Manager-Level User Guide

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

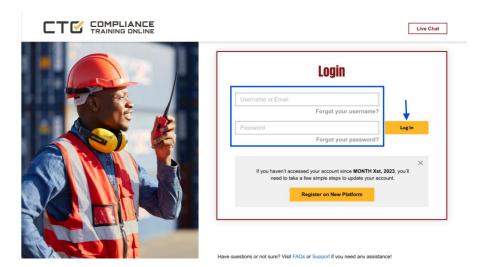
STEP 1

LOGIN

Go to compliancetrainingonline.com and click Login at the top of the page.

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Enter your Email Address and Password, then click Login.



OR

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

LOGIN							
Please enter your Username and Password below.							
Username:	John.do						
Password:							
FORGOT?	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 you have been granted access to modify.

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	Add Users W Learning Center	
	do to - Courses	
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On a mobile compatible device, this is the view of your Dashboard:

QUICK LINKS Easily access the most common tasks by cli	cking the links below.		
		202	
Assign Seats	Find Certificates	Manage Users	
Montening ¹⁰⁰ All Rights Reserved - Along Lin (Center His Center Press)	CONTINUE	LimitedNanager/RCD Last Name 109	OUT

STEP 3 MANAGE USERS

Once you select ADD USERS or ENROLL USERS on desktop devices or ASSIGN SEATS on mobile devices, you will be taken to the Limited Manage-access view of the training platform.

Limited Manager-level access shows three tabs in the top right corner of the screen:

- Users & Groups
- Plan & Enroll
- Profile

USERS & GROUP

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.

BUY MORE COURSES

You can purchase more courses for your employees by clicking Buy More Courses.

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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.

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age Users	Manage Search and new	Users or users within your organizat	ton. Ock the Search button to look for a user from search options. Ock on a name	e to edit the user's profile and preferen	
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Enter your search parameters.

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. We suggest changing the selection criteria to "Contains" in order to receive the most relevant results.

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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.

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

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This opens the user profile page.

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

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	State / Province	Provine State			
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You also have the option to lock, expire or disable a user account by clicking the YES or NO option. **NOTE:** NO is selected by default.

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

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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.

		My Courses Below are the courses that you have access to. Click the course name to begin a course. To view additional details including statistics and course description, please click the "More Details" link beneath the course name. The 'Show' drop-down of courses.	options provide a filtered view
	Mis	cellaneous Continuing Education Units	Course Status
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Ť	2	Life Support (BLS) Recertification ccessed: Jan 24, 2020 6:12:00 PM More Details Device Details Print Card Print Certificate	Completed

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-level access page.

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Welcome back, demo test	
My Courses below are the course that you have access to. Click the course name to begin a course. To view additional details including statistics and course description, please click the provide a fittend view of courses.	Nove Details' link beneath the course name. The 'Show' drop-down options
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Recently Accessed Courses Continuing Education	on Units Course Status
COND-10 Anaroment Expired On Tuesday, November 2, 2021 Last Accessed: Nov 5, 2020 3 00:08 AM Novs Ontols Device Details	
	demo test SWITCH BACK LOG OUT

PLAN & ENROLL

- 1. Click Enroll Users by Course
- 2. Search for a user by first name, last name, or email address
- 3. Select the user whom you want to assign a course to
- 4. Click NEXT
- 5. Search for the course you want to enroll the user in
- 6. Select the correct course
- 7. Enter the start and end date

NOTE: The end date cannot be more than 365 days past the initial date of enrollment.

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famil	This excitent will help you envil users into courses.	1	
	Ervol Users Assistant		
	This enrolment wizard will guide you through the necessary steps to successfully enrol learners into courses.		
	For your enrollment to be successful, there must be suats available in the courses you wish to enroll and learners must have enrollment right Enroll Users by Course	ts to these courses.	
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Then select USERS.

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

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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.

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Assign Enrolments Wzard Showing 2 of 6 D Instead	Assign Enrollment - Search for learners to evail into course	Select Learners		
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Choose the course you want to enroll the user in by searching by course name:

usign Enrolments Wizard howing 3 of 6	Assign Enrollment - S	elect Courses			
L Salact Errolmant Mathod	Select the courses you wish to enrol learne	ers into.			
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Select the desired course from the results.

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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.

Dute Contract End Date
C0/28/2024
PREVIOUS NE

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.

Assign Enrolments Witard Showing S of 6	Assign Enrollment - Assign Seect options for the course envolvent. Diplicate	ment Options residents will be either updated to the new	proliment in this training plan or ignored per your selection.	
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Once you've clicked FINISH, you will see a confirmation screen confirming the enrollment was successful.

BUY MORE COURSES

To purchase additional seats for your organization, click BUY MORE COURSES Tab on the menu bar.

			DASHBOARD	BUY MORE COURSES	USERS & GROUPS	PLAN & ENROLL	PROFILE
Kearch and manage users within your org	anization. Click the Search button to look	for a user from search options. Click o	n a name to edit the user's profile and pref	erences.			
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PROFILE

To view your profile, click the PROFILE button at the top right of the screen. Here you will find your login information.

						USERS & GROUPS		PROFILE
Hy Profile								
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The bottom right-hand side of the screen allows you to switch between your Manager and Learner access modes. Learner mode will allow you to access your courses, Certificates of Completion or update your personal profile information.

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Compliance Training Online (CTO) - Contact Us

Visit our <u>Resources</u> page <u>Chat with us live on our website</u> Call: 512-410-7335 Email: <u>support@360training.com</u>