

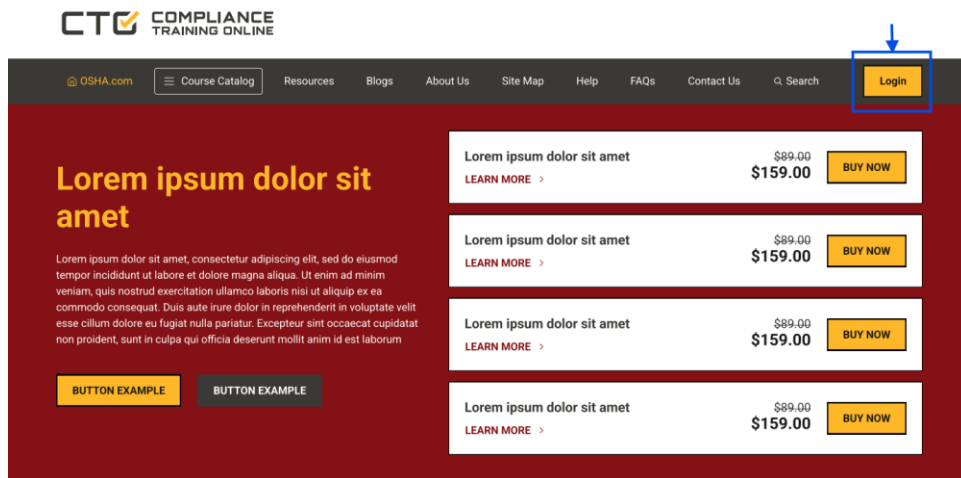
# Compliance Training Online (CTO) Platform

## Limited Manager-Level User Guide

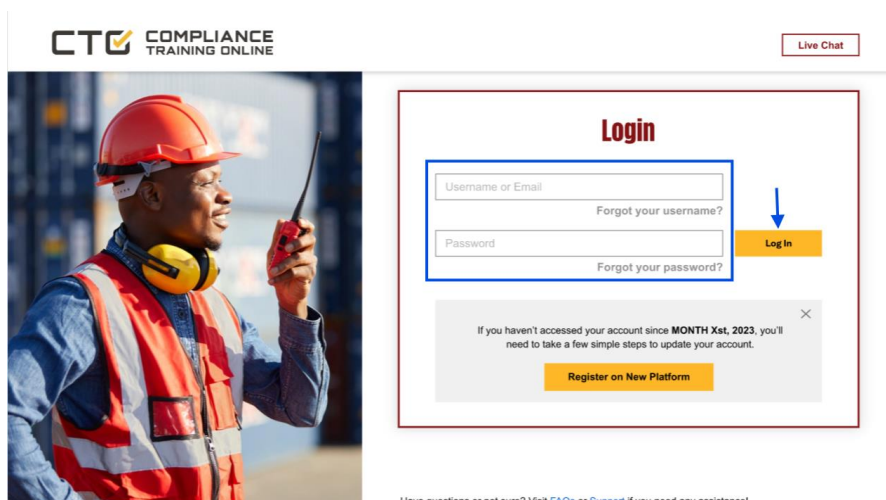
This document will guide you through the features and benefits made available with LIMITED MANAGER ACCESS.

### STEP 1 LOGIN

Go to [compliancetrainingonline.com](https://compliancetrainingonline.com) and click **Login** at the top of the page.



Enter your Email Address and Password, then click **Login**.



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:

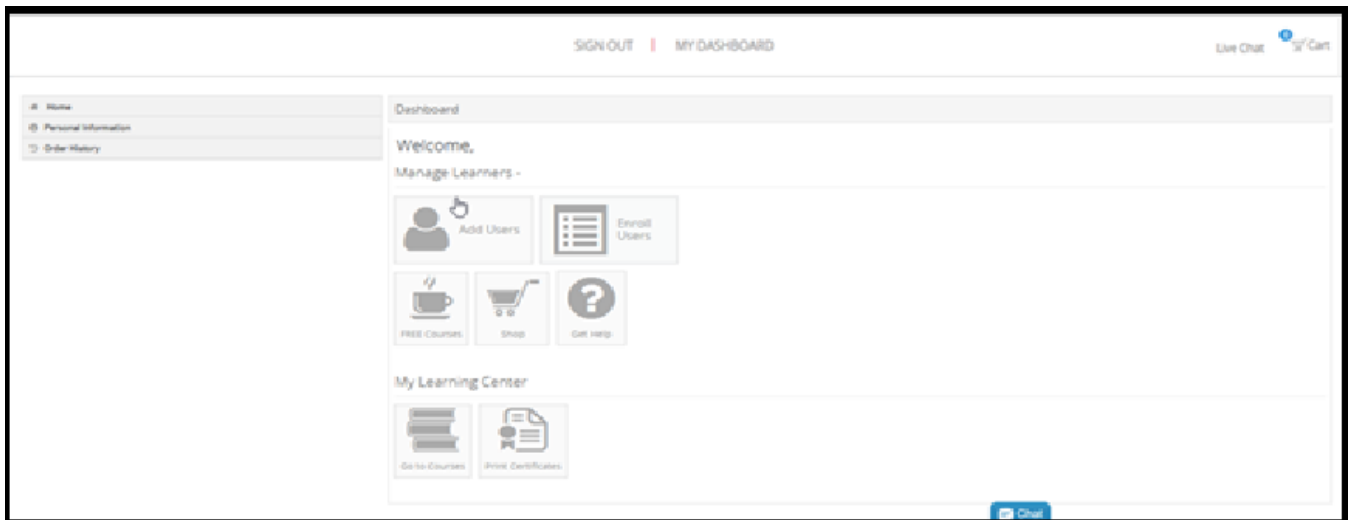
[FORGOT?](#) [LOGIN](#)

## STEP 2

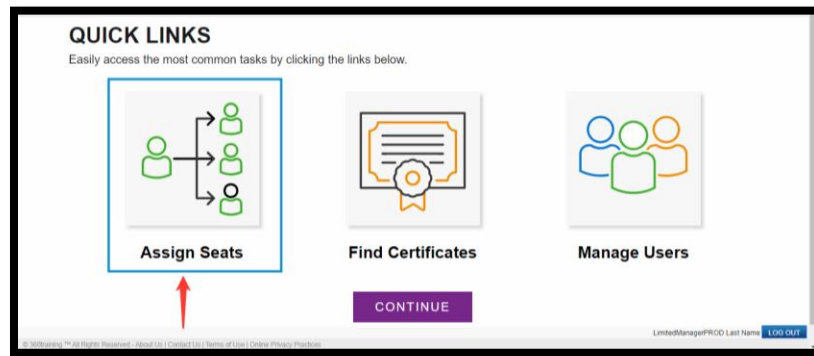
### VIEW YOUR DASHBOARD (Desktop View)

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.



On a mobile compatible device, this is the view of your Dashboard:



### 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 Manager-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

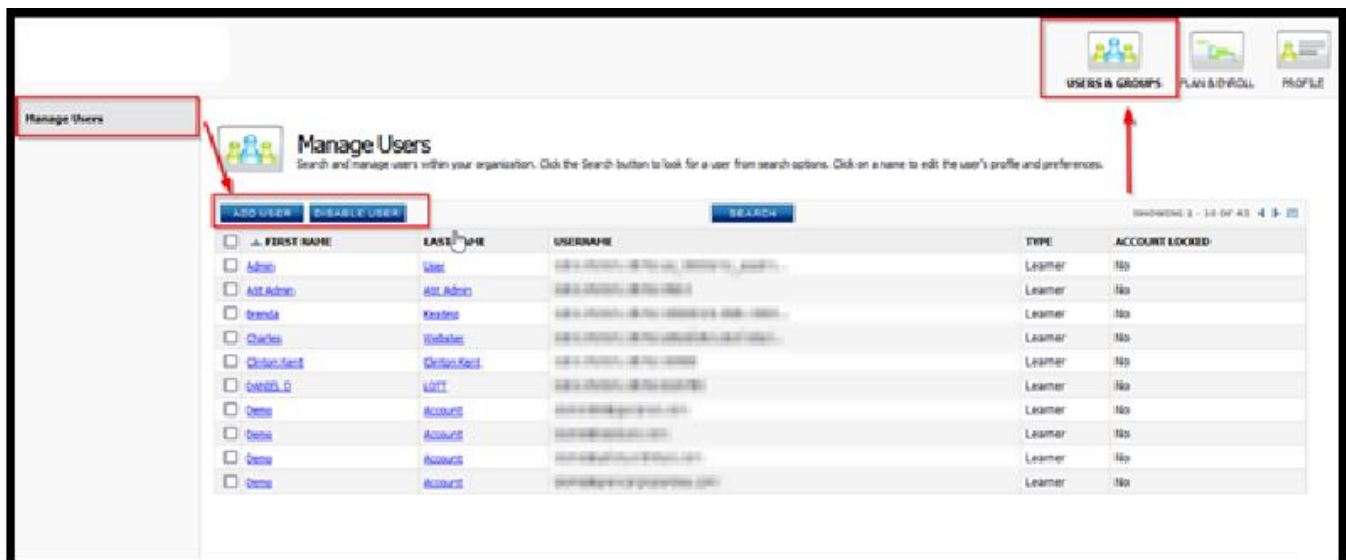
#### USERS & GROUP

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.

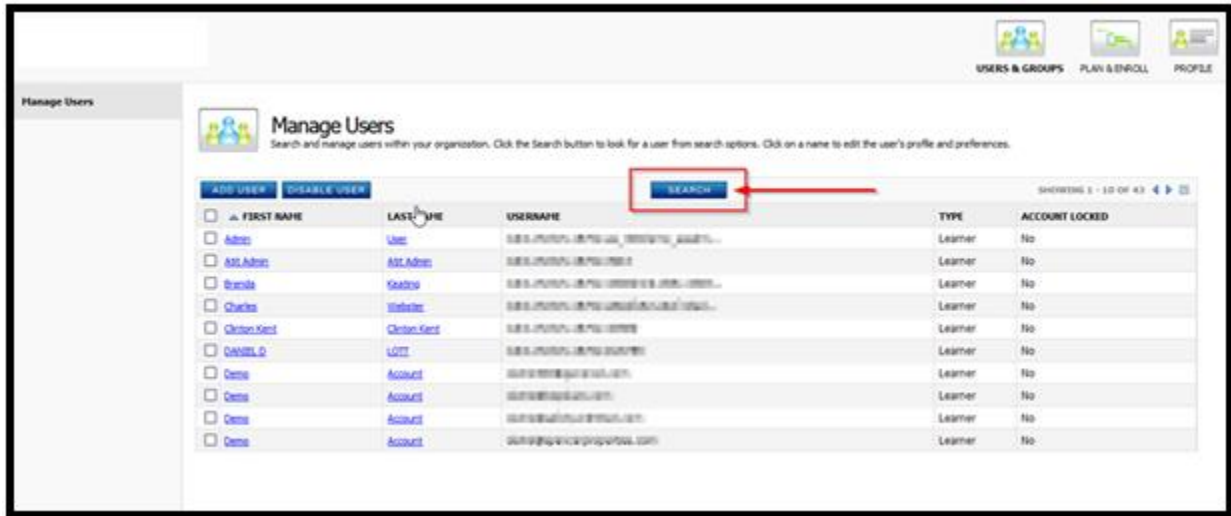
#### BUY MORE COURSES

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

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.

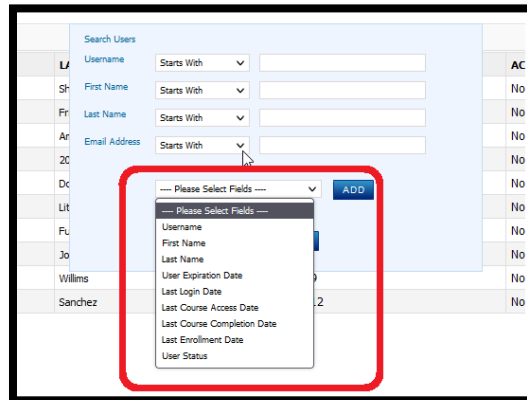


Enter your search parameters.

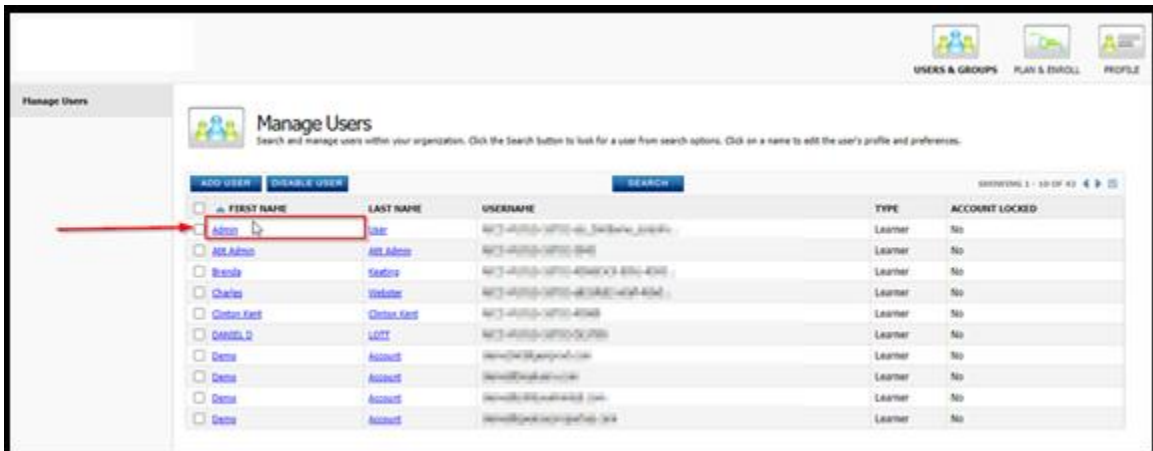
**SEARCH TIPS:** Inadvertently adding a space at the end of a name or email address may cause the search to return unexpected results. Make sure there are no spaces after any text you type in search fields. You can also leave all the fields blank to search to see all the users in your account. We suggest changing the selection criteria to "Contains" in order to receive the most relevant results.



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.

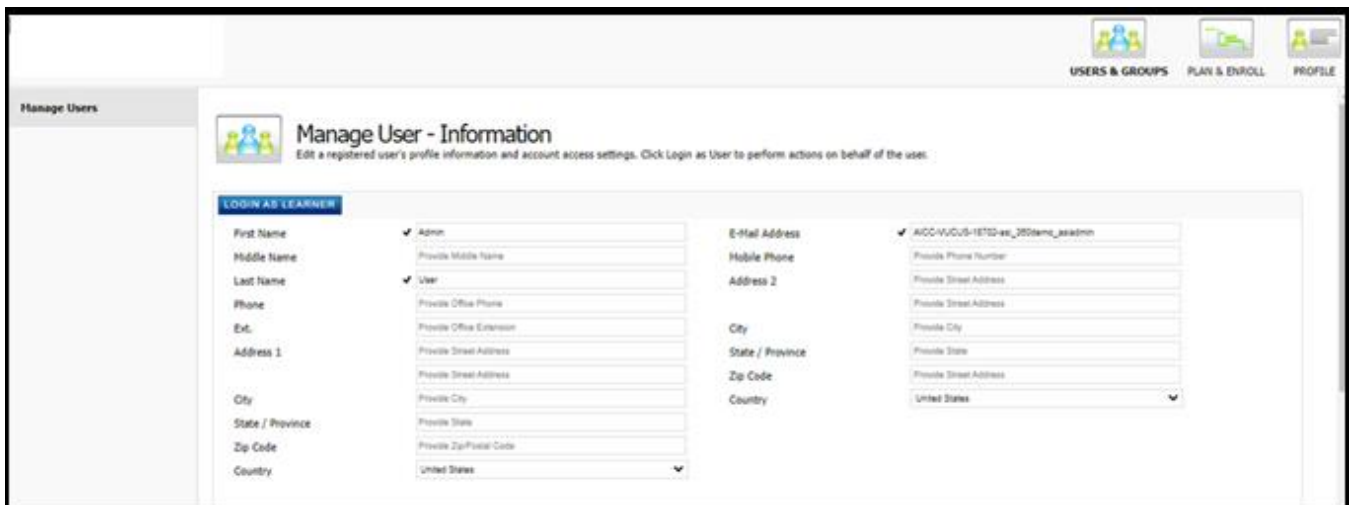


Click the first name of a user to view their user details.

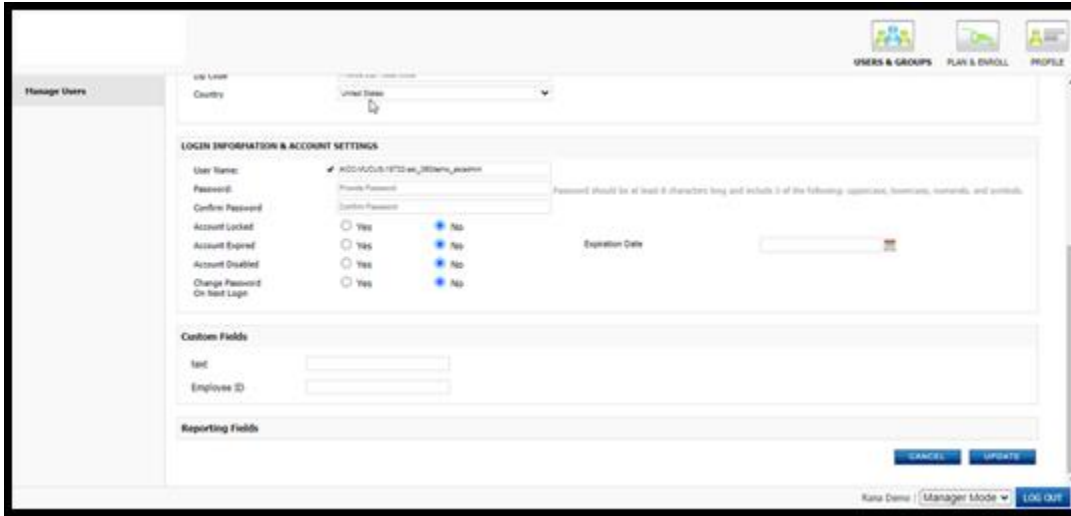


This opens the user profile page.

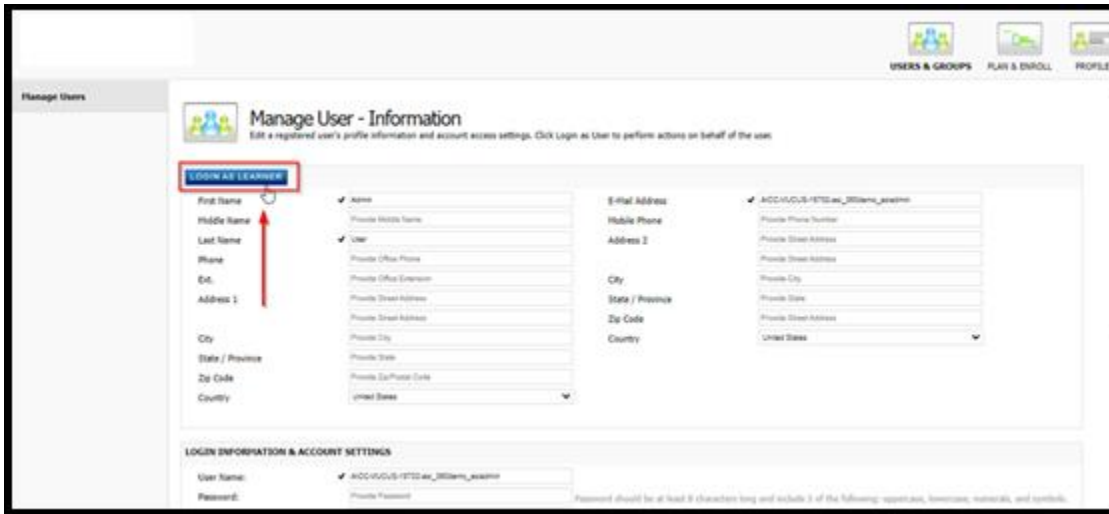
**NOTE:** You can edit all user details, including password, except for username.



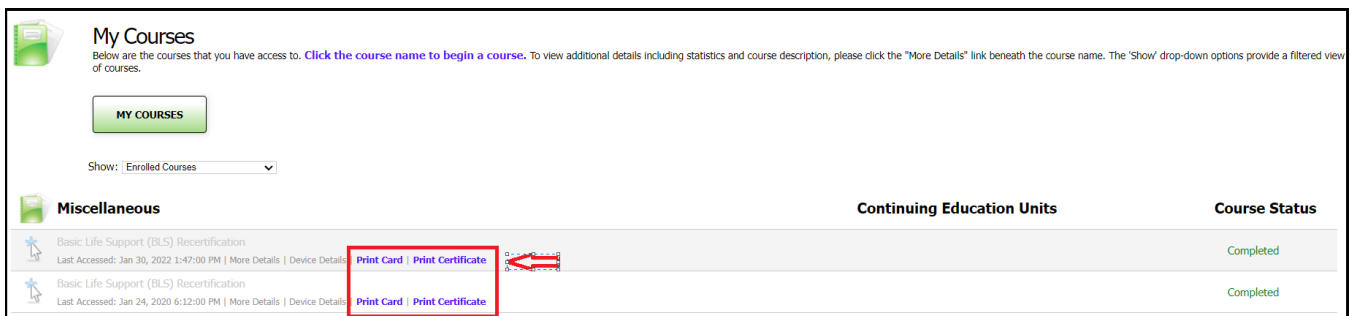
You also have the option to lock, expire or disable a user account by clicking the YES or NO option.  
**NOTE:** NO is selected by default.



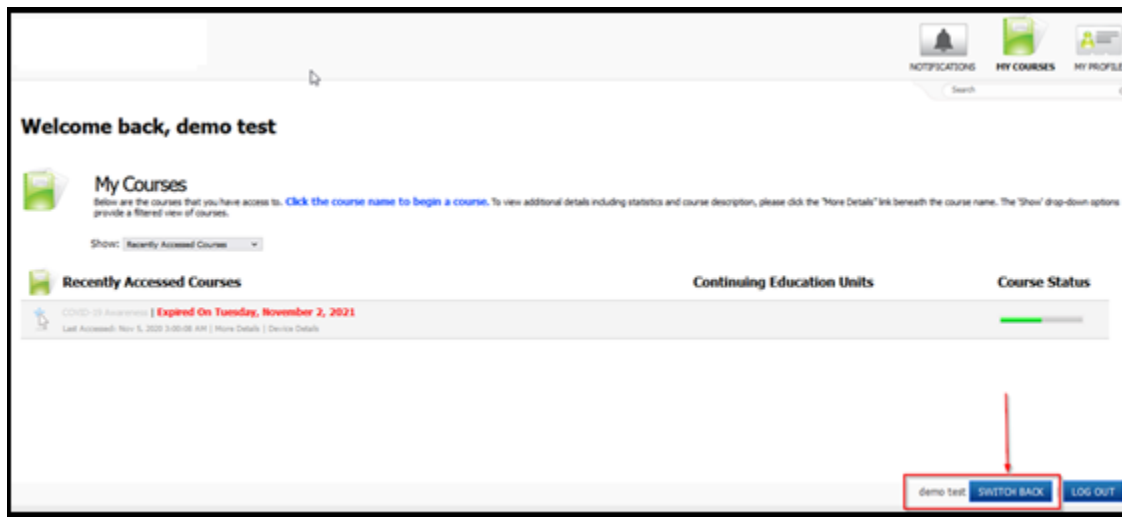
Click the LOGIN AS LEARNER button to access course completion records.



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.



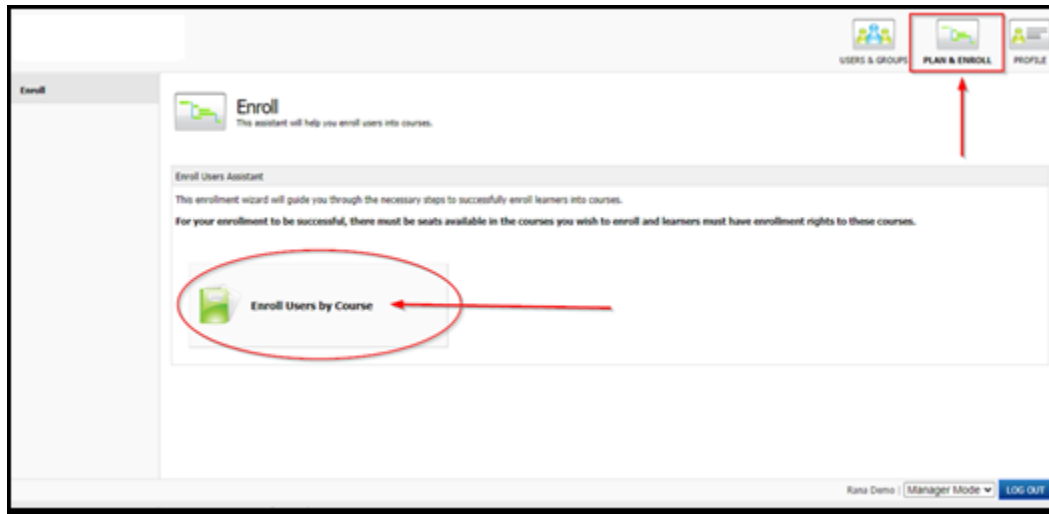
To leave the LOGIN AS LEARNER view, click the SWITCH BACK button at the bottom right-hand corner of the page. This will take you back to your manager-level access page.



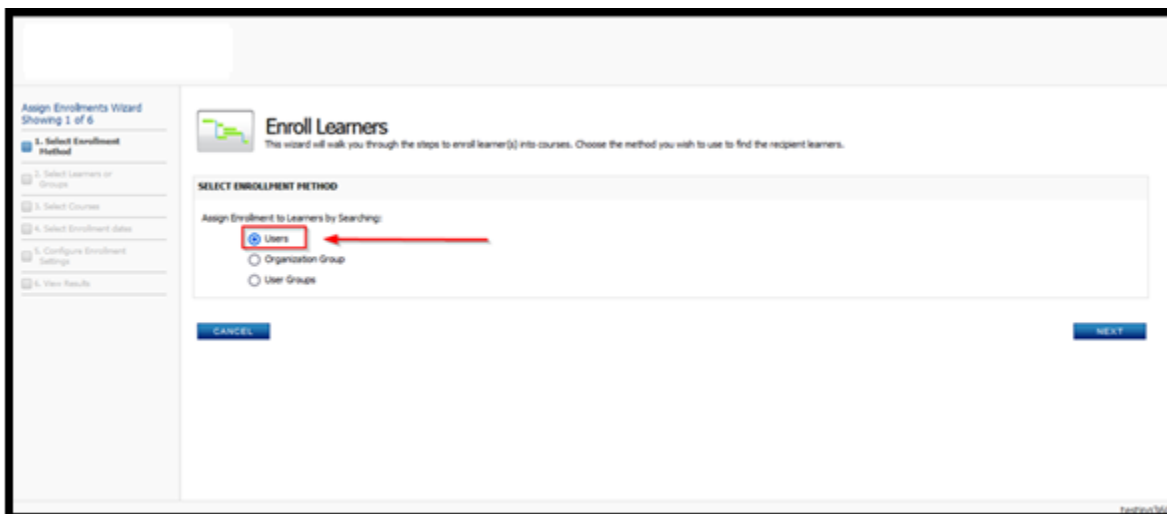
## PLAN & ENROLL

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.

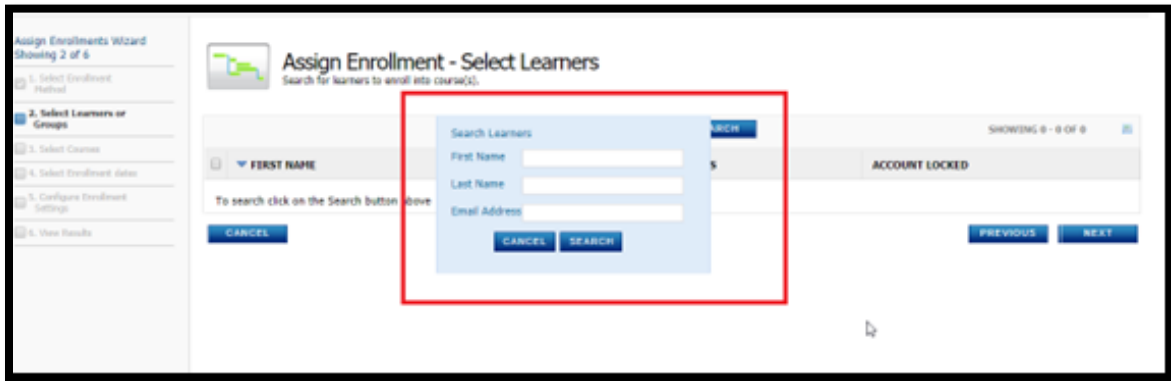


Then select USERS.



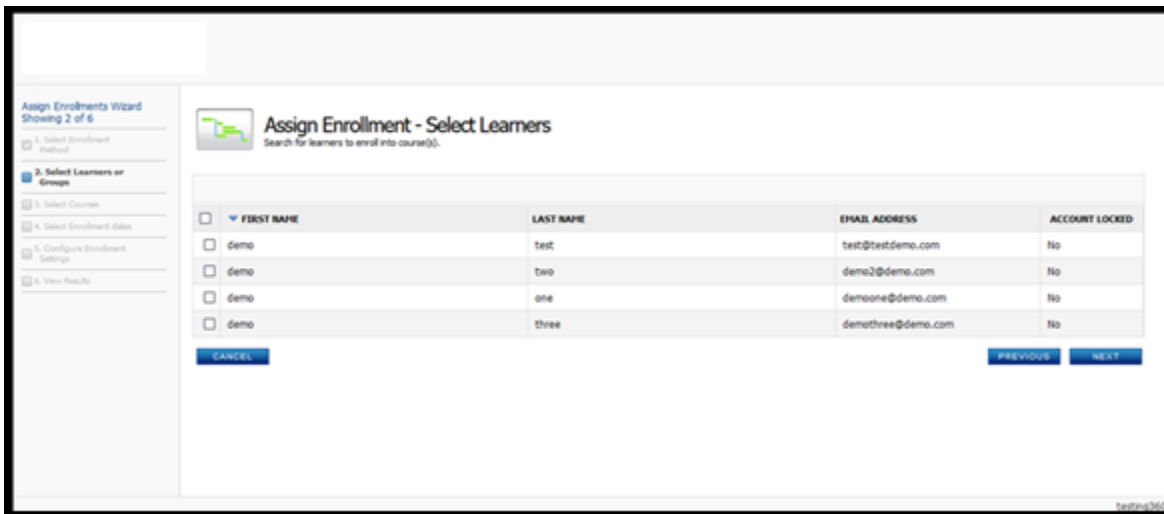


You can search for the user you want to enroll by first name, last name, or email address.

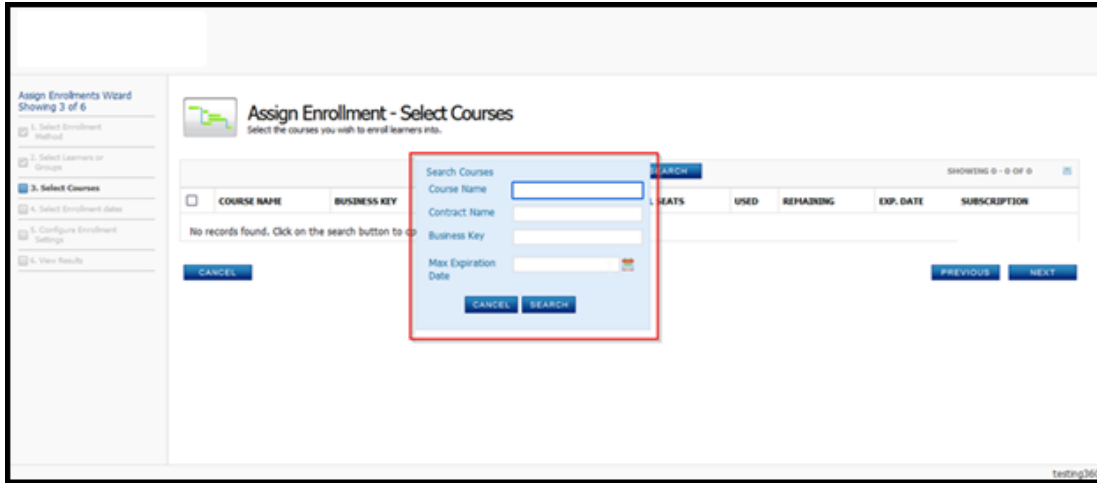


**SEARCH TIPS:** Inadvertently adding a space at the end of a name or email address may cause the search to return unexpected results. Make sure there are no spaces after any text you type in search fields. You can also leave all the fields blank to search to see all the users in your account.

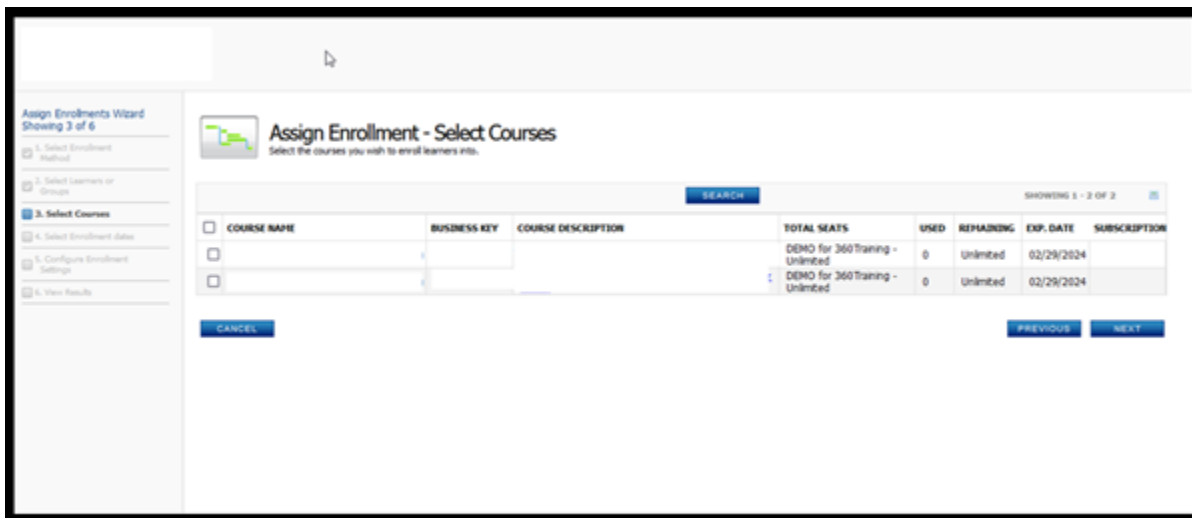
Select the user you want to enroll by clicking the box next to their name, then click NEXT.



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



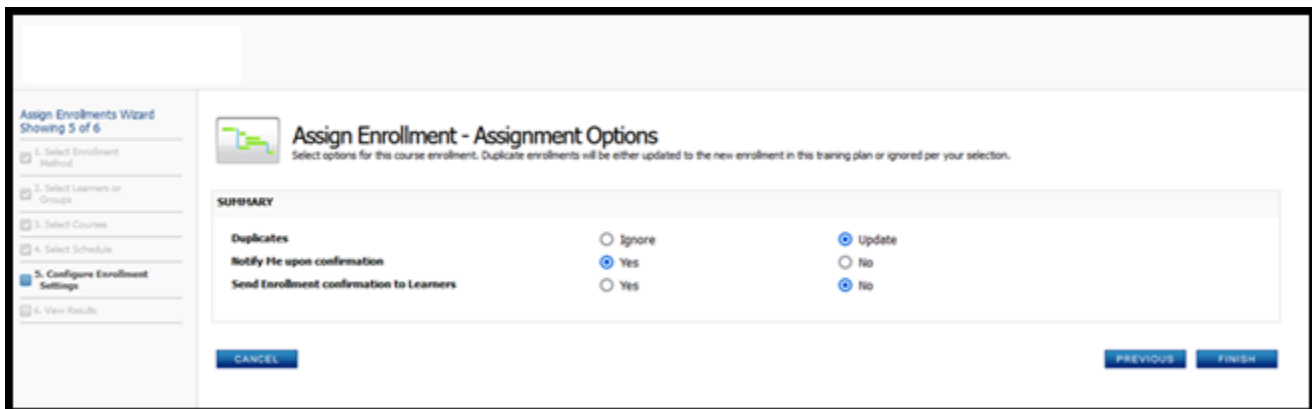
Select the desired course from the results.



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.



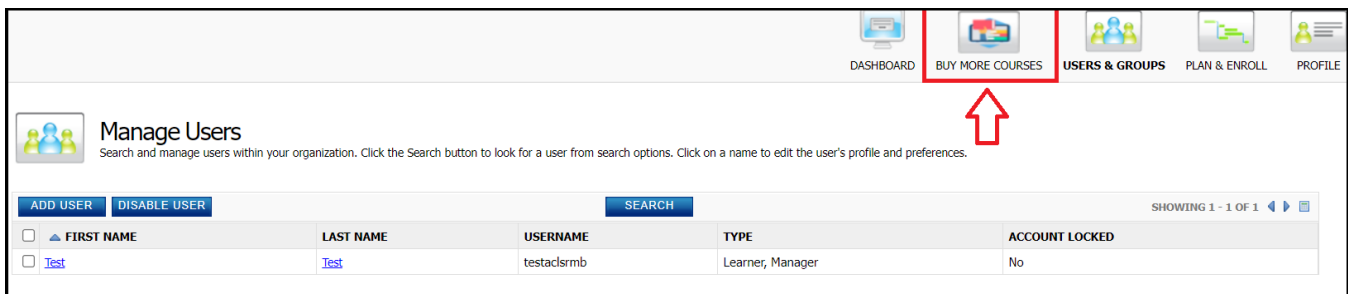
On the final screen of the training plan assignment, you can choose to Send Enrollment Confirmation to Learner by choosing YES. Click FINISH to complete the enrollment. You must click FINISH to ensure the course(s) is assigned.



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

## BUY MORE COURSES

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



## PROFILE

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

The screenshot shows the 'Profile' page. It features a navigation bar with 'USERS & GROUPS', 'PLAN & ENROLL', and 'PROFILE'. The main content area is titled 'Profile' and contains a 'CUSTOMER PROFILE' form. The form includes fields for Customer Name, First Name, Last Name, Phone, Email Address, Website URL, Account Status (Active/Inactive), and two Address sections (Address 1 and Address 2). At the bottom right, there are 'CANCEL' and 'SAVE' buttons, and a mode selector for 'Manager Mode'.

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.

The screenshot shows the 'Manage Users' page. It features a navigation bar with 'USERS & GROUPS', 'PLAN & ENROLL', and 'PROFILE'. The main content area is titled 'Manage Users' and contains a table of users. The table has columns for 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. At the bottom right, there are buttons for 'Learner Mode' and 'Manager Mode', with a red box highlighting the 'Learner Mode' button.

CHECKBOX	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No
<input type="checkbox"/>	Admin	Admin	admin@360training.com	Learner	No

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Call: 512-410-7335

Email: [support@360training.com](mailto:support@360training.com)