

Manager

Manager Introduction

Manager Account Types

- Type 5 (e.g., User Group Manager)
- Type 6 (e.g. Campus Manager)
- Type 13 (e.g., Campus Admin)

This manual has been written as a guide for Manager account types. Manager accounts are typically used to manage the users under their supervision to complete activities in the LMS such as:

- Create accounts
- Assign user roles
- Create groups
- Modify group membership
- Run reports
- View learner results

Permissions Covered in Different Manuals

- Navigation and general desktop experience can be found in the [Participant User Manual](#).
- Managing grades and scheduled courses can be found in the [Instructor User Manual](#).
- Running reports can be found in the [Reports Manual](#).

- Course creation and file/content management can be found in the **Course Author User Manual** (coming soon).



This manual may reference features not configured for your system or features may be named differently due to site customizations. Informetica is under constant development and some differences between the live application and this manual may occur.

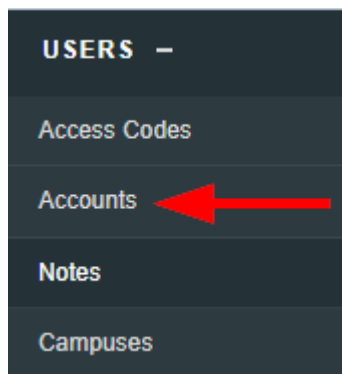
Navigate to User Accounts



This feature is available to [Site Managers](#) , [Managers](#) , and [Course Authors](#) , depending on system configuration.

Site Manager Navigation

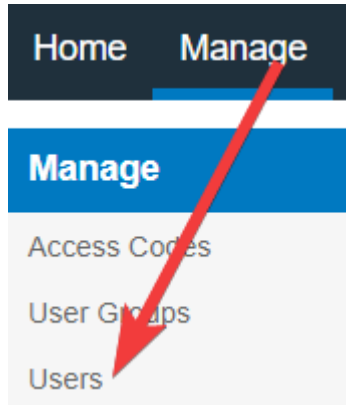
1. Select **Accounts** from the Users tab.



2. Select an account name to open the user's profile.

Manager Navigation

1. Select **Users** from the Manage tab.



2. Select an account name to open the user's profile.

Course Author or Instructor Navigation

1. Open a course.
2. Select **List** from the Utilities menu.
3. Select an account name to open the user's profile.

Registration and Enrollment



Some or all of these features may not be in use for your system.

There are several methods to manually enrol users. This chapter covers the type of manual

enrolments available to Manager accounts.

- [Scheduling Tool](#) enrolments are covered in the [Instructor User Manual](#).
- The manual enrolment methods available only to Site Managers are covered in the [Site Manager User Manual](#).



Systems that use automatic enrolments (e.g. via an integration, single-sign-on, or automatic enrolment by user group), should use these enrolment methods with caution.

Campus Enrolments



This feature is available to [Site Manager](#) and [Manager](#) accounts depending on system configuration.

Users may be added to any of the campuses available to the account.

Add Campus enrolment

1. Log in with Site Manager or Manager account.
2. [Navigate to the user's profile](#) .
3. Select **Registrations** from the Section menu.

Sections

User Details

Registrations

Select	Campus	Default	Dictionary
<input type="checkbox"/>	Sencia Canada, Ltd.	<input checked="" type="radio"/>	English Dictionary

--- Select Campus ---

--- Select Campus ---

Course Creation Area

Add

4. Select the campus from the drop-down.

5. Select **Add**.



You can enrol one campus at a time from the user's profile. The user is not removed from other campus enrolments.

Remove Campus Enrolment

1. Log in with Site Manager or Manager account.
2. [Navigate to the user's profile](#) .
3. Select the campus to remove.
4. Select **Remove**.
5. Use **Select All** to remove several campuses at a time.

Campus Registration

Select All

Remove

Select	Campus	Default	Dictionary
<input checked="" type="checkbox"/>	Sencia Canada, Ltd.	<input checked="" type="radio"/>	English Dictionary



The system requires the user to remain enrolled to at least one campus.

Change Default Campus



Changing the default campus can affect system relationships. Use caution, especially if your system uses single-sign-on (SSO) or has an integration with a 3rd party system. Changing the default campus can affect system relationships and determine which theme (skin) is applied and which language and email alerts an account sees.

The default campus can determine which theme (branding, colours) is applied and which language and email alerts an account has access to.

1. [Navigate to the user's profile](#) .
2. Select the campus from the drop-down menu under default campus.



The user is not removed from their former default campus enrolment.

Bulk Campus enrolments

Multiple campus enrolments can be done via the Import Utility. Select the Users import type from the drop-down.

Enrolment via Access Code

This feature is available to [Site Manager](#) and [Manager](#) accounts depending on system



configuration.

Manager accounts must have an access code made available to them before they can enrol users to a product unless they are using the [Scheduling Tool](#). For some systems, a Site Manager may need to create and set up the access code on your behalf. See [Access Codes](#) for more details.



When enrolling users with an access code, the LMS limits the selection to one page of users at a time (a maximum of 100). See [Pagination](#) for more details.



Users enrolled via an access code are enrolled in all user groups and products defined in the access code.

Enrol Using a Manager Account

1. [Navigate to User Accounts](#) .
2. Optionally use the [Pagination](#) and **Filter Options** to define the results.
3. [Select the check boxes](#) for each user that needs to be enrolled or select **All** to select all users on the page.
4. Select **Register** at the top of the list.

[Create](#)
[Activate](#)
[Deactivate](#)
[Register](#)

1 2 3 4 Next
 Go to page: Go
 Records per page: 50

[All](#)
[A](#)
[B](#)
[C](#)
[D](#)
[E](#)
[F](#)
[G](#)
[H](#)
[I](#)
[J](#)
[K](#)
[L](#)
[M](#)
[N](#)
[O](#)
[P](#)
[Q](#)
[R](#)
[S](#)
[T](#)
[U](#)
[V](#)
[W](#)
[X](#)
[Y](#)
[Z](#)

<input type="checkbox"/> All	User	Username	Status	Type
<input checked="" type="checkbox"/>	Adkins, Ian		Registered	Student
<input checked="" type="checkbox"/>	Ahrens, Mike		Registered	Student

Register Users

You are viewing:

Users to Register:

1. Marisa Brook
2. Orrin Broberg
3. Jane Brick

Access Code:*

Select One

Select One
 saybiz
 sencia
 zxvjaeufhui

[Register Now](#)
[Cancel](#)

5. Select an access code from the drop-down menu.
6. Select **Register Now**. A summary screen will confirm the enrolments.
7. Optionally [select the check boxes](#) to send users an enrolment email.

Enrol Using Site Manager Account

1. [Navigate to User Accounts](#) .
2. Optionally use the [Pagination](#) and **Filter Options** to define the results.
3. [Select the check boxes](#) for each user that needs to be enrolled or select **All** to select all users on the page.
4. Select **Registration to Access Code** from the user options menu. If you can't see the menu, [Show Tool Panel](#) .



5. Select an access code from the drop-down at the bottom of the page.
6. Select **Register Now**. A summary screen will confirm the enrolments.
7. Optionally [select the check boxes](#) to send users an enrolment email.

Exceptions



This feature is available to Site Managers, [Manager accounts](#) , [Course Author accounts](#) , and Instructors, depending on system configuration.

An exception lets you grant an additional attempt or a time extension to content an individual is enrolled to.

Navigate to Exceptions

1. [Navigate to the user account](#) .
2. Select **Exceptions** from the Section menu.

Create an Exception


1. Select **Create** next to either Asset Exceptions or Product Exceptions.

2. Pick a scenario below for more instructions.

Product Date Exception

Allow a user access to a product past the expiry date for a limited time.

1. Select **Create** under Product Exceptions.



The screenshot shows the 'Product Exceptions' section with a 'Create' button and a table of exceptions. The table has columns for Products, Description, Start Date, End Date, Duration, and Status. One exception is listed for 'Negotiating Styles' with a description about a departmental fire, a start date of 3/22/2012, an end date of 3/29/2012 11:59:59 PM, a duration of 7 days, and an active status.

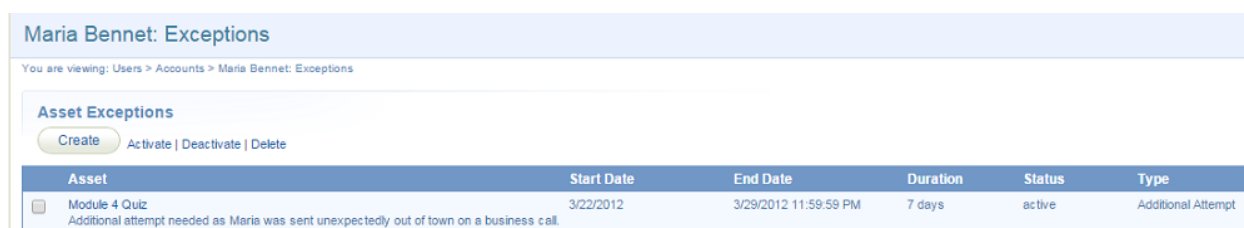
Products	Description	Start Date	End Date	Duration	Status
<input type="checkbox"/> Negotiating Styles	Exception added since departmental fire meant access to company PCs was limited.	3/22/2012	3/29/2012 11:59:59 PM	7 days	active

2. Select one or more products.
3. Enter the date range that the user is allowed access to the products.
4. Optionally enter a time range.
5. Optionally enter a description to explain the reason for the exception.
6. Optionally select **Yes** under Send Product Exception Email to email the user that an exception was created for them.
7. Select **Create**.

Asset Date Exception

Grant access to an asset that is not currently published.

1. Select **Create** under Asset Exceptions.



The screenshot shows the 'Maria Bennet: Exceptions' section with a breadcrumb trail 'You are viewing: Users > Accounts > Maria Bennet: Exceptions'. Below is the 'Asset Exceptions' section with a 'Create' button and a table of exceptions. The table has columns for Asset, Start Date, End Date, Duration, Status, and Type. One exception is listed for 'Module 4 Quiz' with a description about Maria being out of town, a start date of 3/22/2012, an end date of 3/29/2012 11:59:59 PM, a duration of 7 days, an active status, and an 'Additional Attempt' type.

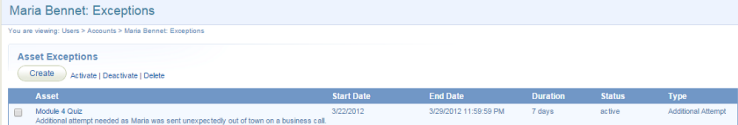
Asset	Start Date	End Date	Duration	Status	Type
<input type="checkbox"/> Module 4 Quiz Additional attempt needed as Maria was sent unexpectedly out of town on a business call.	3/22/2012	3/29/2012 11:59:59 PM	7 days	active	Additional Attempt

2. Select **Date Extension** under exception type.

3. Select the target product and asset.
4. Enter the date range that the user is allowed to access the asset.
5. Optionally enter a time range.
6. Optionally enter a description to explain the reason for the exception.
7. Optionally select **Yes** under Send Asset Exception Email to email the user that an exception was created for them.
8. Select **Create**.

Additional Attempt Exception

Grant one additional attempt to a user who has completed all available attempts. The additional attempt is valid regardless of any publish date on the asset. Exceptions created for tests configured to retake only failed sections will allow users to retake only the failed sections.



Asset	Start Date	End Date	Duration	Status	Type
Module 4 Quiz Additional attempt needed as Maria was sent unexpectedly out of town on a business call	3/22/2012	3/29/2012 11:59:59 PM	7 days	active	Additional Attempt

1. Select **Create** under asset exceptions.
2. Select Additional Attempt under exception type.
3. Select the relevant product and asset.
4. Enter the date range that the user is allowed to access the asset.
5. Optionally enter a description to explain the reason for the exception.
6. Optionally select **Yes** under Send Asset Exception Email to email the user that an exception was created for them.
7. Select **Create**.

Activate, Deactivate, or Delete Exceptions

-
1. [Navigate to Exceptions](#) .
 2. Select the exceptions link under asset or product exceptions.
 3. Select the [check box](#) for the exception you wish to change.
 4. Select Activate, Deactivate, or Delete from the top.

Grant Multiple Exceptions at Once

The User Course Registration Import Utility can be used for bulk updates of duration days. In step three of the import, you can match Duration Days to your Excel template to create different durations or enter a number directly in the Import Utility in the Duration Days field to give every user in the import the same number of duration days.

View a User's Transcript



This feature is available to [Site Manager](#) , [Manager](#) , [Course Author](#) , [Instructor](#) , and Help Desk accounts, depending on system configuration.

The transcript shows grades and completion statuses associated with the assets within a user's registered [products](#) . The page may also be configured to show additional information such as supplementary training and certifications.

1. [Navigate to user accounts](#) .
2. Select a user's name to open their profile.
3. Select **User's Transcript** from the Sections menu.

Sections

User Details

Registrations

User's Transcript

4. For any product, select the + symbol to view asset grades and completion statuses.

Transcript

Expand All

Print Page

English

Individual Products

+

Acceptable Use Policy - Enrollment Date: 11/29/2017 11:25:05 AM

-

Privacy Awareness - Enrollment Date: 5/30/2017 3:10:48 PM

My Results	Take #	Date	Highest Grade	Passed
What is Privacy?		5/31/2017 9:49:07 AM		Completed
What is Personal Information?		5/31/2017 10:50:38 AM		Completed
Privacy Awareness		5/31/2017 10:43:51 AM		Completed
Video		5/31/2017 11:18:48 AM		Completed
Ten Principles		5/31/2017 11:11:02 AM		Completed
PIPEDA as Law		5/31/2017 11:13:27 AM		Completed
Privacy Awareness Test	2	6/12/2017	Details	Passed



The information that shows on a transcript is limited to the following asset types:

- Modules (completion rules defined by affidavit acceptance, passing grade, or upon view)
- Questionnaire
- Prova test
- Remote AICC
- SCORM



This feature is available to [Site Manager](#) and [Manager](#) accounts depending on system configuration.

Introduction

The supplemental training feature lets you store and track records for content that is not offered within the system. You can also upload supporting documents to each user's training record, track associated costs, and use automatic email alerts to let users know when their training is expiring. Any number of supplemental training records can be added to a user's profile and then edited, deleted, and reported upon.

Training Record Reports

1. [R403](#) is a dedicated external training report report.
2. [R404](#) is a dedicated internal training report report.
3. The Supplemental Training page itself can be [filtered and exported](#) as R906.

Navigate to Training Records



This feature is available to [Site Manager](#) and [Manager](#) accounts depending on system configuration.

Individual's Training Records

1. Navigate to User Accounts .
2. Select **Supplemental Training** from the Sections menu on the right. If you can't see the menu, show the [Tool Panel](#) .



Example of an individual's supplemental training page.

[Add Supplemental Training](#)

Internal Supplemental Training

[Show All](#) Active Expiring Soon Expired

Product	Description	Attachment	Start Date	End Date	Expiry Date	Price
WHMIS(+)	Non-mandatory auxiliary training as WHMIS instructor.	whmisinstructor.jpg	9/10/2014 12:00 AM		9/10/2015 12:00 AM	\$0.00
Intro to Air Ambulance 2.1		air_ambulance_quiz.pdf	1/9/2015 12:00 AM		2/1/2016 12:00 AM	\$0.00

External Supplemental Training

Title	Vendor	Instructor	Location	Description	Attachment	Start Date	End Date	Expiry Date	Price
OR Clinical Shift			Thunder Bay Regional Health Sciences Centre		clinical_hours_summary_-_or_.pdf	10/10/2014 12:00 AM	10/21/2014 12:00 AM	1/1/2015 12:00 AM	\$0.00
ER Clinical Shift			Thunder Bay Regional Health Sciences Centre		clinical_hours_summary_-_er.pdf	1/1/2015 12:00 AM	1/30/2015 12:00 AM	1/29/2016 12:00 AM	\$0.00

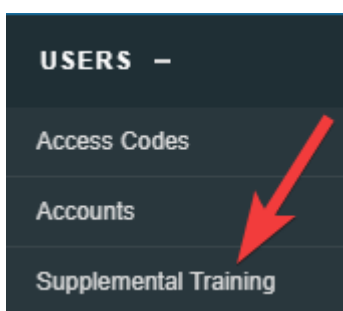
Supplemental Training Page

From this page you can view, sort, filter, export, delete, and edit existing supplemental training items for multiple users. The page displays the ID, type, associated product or title, user, various dates, and any attachments for each entry.

1. Log in with a Manager or Site Manager account type.
2. Select **Supplemental Training**. The location of Supplemental Training is based on your account type.
 - a. Manager accounts will find it in main navigation tab.



- b. Site Manager accounts will find it under Library in the main navigation menu.



Example of the Supplemental Training page.

1 2 Next > Go to page: Go Records per page: 25 Records: 27 Export as: [HTML](#) [Excel](#)

ID	Type	Product/Title	User	Start Date	End Date	Expiry Date	Attachment	
51	external		kadams@sencia.ca Kevin Adams	1/10/2020 12:00 AM	1/10/2020 12:00 AM	1/10/2021 12:00 AM	earned_certification.pdf	Edit
36	internal	WHMIS	kadams@sencia.ca Kevin Adams	12/9/2016 12:00 AM	12/9/2016 12:00 AM	8/23/2018 12:00 AM	wmis_trainer.png	Edit
48	internal	TDG Certification	kahola@sencia.ca Ken Ahola	1/3/2020 12:00 AM	1/3/2020 12:00 AM	1/3/2021 12:00 AM	earned_certification.pdf	Edit
37	external	CPR	mvilleeneuve@sencia.ca Magali Villeneuve	2/10/2017 12:00 AM	2/10/2017 12:00 AM	7/10/2019 12:00 AM	cpr_certification_card.jpg	Edit
29	external	ER Clinical Shift	mvilleeneuve@sencia.ca Magali Villeneuve	1/1/2018 12:00 AM	1/20/2018 12:00 AM	6/1/2020 12:00 AM	clinical_hours_summary_-_er.pdf	Edit

- Optionally use [Filter and Save Searches](#) to locate specific supplemental training items.
- Optionally [export](#) the supplemental training list.

Create or Edit Training Records

There are multiple methods for creating new supplemental training records. Select the applicable method below.

Create an Internal Training Record

Internal training records are those that can be associated with exiting content in the system. For example, a WHMIS course is available on the system, but your Health and Safety officer needs additional training that is performed outside of the LMS. You can add several training records to the same product. As you enter each record, the most recent update will appear on top while a history of each record update appears below.

1. Navigate to [Individual's Training Records](#) .
2. Select **Add Supplemental Training**.
3. Select **Internal** from the drop-down menu.
4. Select the associated product from the drop-down menu. This list is the user's product enrolments.
 - If the product you need is not listed, use the **Associate to Product** button to select it and enrol the user.
 - The list contains the products available for enrolment, based on the user's group memberships.
 - The enrolled product will be available in the associated product from the drop-down menu.
5. Complete the rest of the form.
6. Optionally [add, replace, or delete an attachment](#) .

7. Save.

Create an External Training Record

External training records are those that cannot be associated with existing content in the system. For example, an employee that attended a two-day off site trade seminar as part of their professional improvement.

1. Navigate to [Individual's Training Records](#) .
2. Select **Add Supplemental Training**.
3. Select **External** from the drop-down menu.
4. Complete the rest of the form.
5. Optionally [add an attachment](#) .
6. **Save**.

Edit a Training Record

1. [Navigate to Training Records](#) . Both options allow edits.
2. Select the name of the training record.
3. Make changes to editable fields.
4. Optionally [add an attachment](#) .
5. Save.

Bulk Upload Training Records

Create multiple training records associated to specific users via the Import Utility. Select the Supplemental Training import type from the drop-down menu. Note that training record attachments cannot be uploaded this way.

Create Training Record upon Certification



This feature is available to Site Managers depending on system configuration.

See [Automatic Training Record upon Certification](#) .

Manage Training Record Attachments



Each training record can have only one supporting document attached to it.

Add an Attachment

1. [Create a Training Record](#) .
2. Select the name of the training record to open the edit page.
3. Select **Choose File** at the bottom of the page. There is a list of supported files available on this page.
4. Save.

Bulk Upload Multiple Attachments

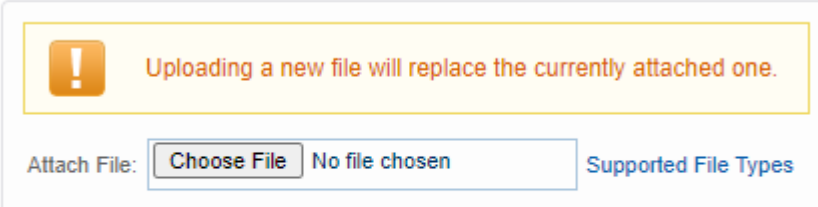
You can pre-upload training record attachments in bulk via your FTP account, and then attach the uploaded files to one individual's training records with the Manage FTP Tool.

1. Open a user's account.
2. Navigate to [Supplemental Training](#) .
3. Select **Add Attachment** for any training item without an attachment.
4. Choose the **Manage FTP** option and then **Upload**. See [FTP File Upload](#) for more details.
5. Select the file then **Transfer File**.
6. Close the modal window and select **Back to Previous Page** from the options menu.

Replace an Attachment

You can upload a new file to replace the attachment associated to a training record.

1. [Navigate to Training Records](#) . Both options allow file replacement.
2. Select the name of the training record to open the edit page.
3. Select **Choose File** at the bottom of the page. There is a list of supported files available on this page.



The screenshot shows a modal window for file upload. At the top, there is a yellow warning box with an exclamation mark icon and the text: "Uploading a new file will replace the currently attached one." Below this, the "Attach File:" section contains a "Choose File" button, the text "No file chosen", and a link for "Supported File Types".

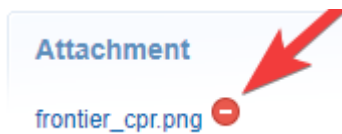
[Save](#) or [Cancel](#)

4. Save.

Delete an Attachment

You can delete the attachment associated to the training record without impacting the training record.

1. [Navigate to Training Records](#) . Both options allow file deletion.
2. Select the name of the training record to open the edit page.
3. Select the **Delete** icon at the bottom of the page under Attachment.



4. Confirm the deletion.

Training Record Availability

Training record availability can be managed using several methods. Select a method below to learn more.

Set an Expiry Date

See [Create a Training Record](#) .

An email notification may be enabled to alert users of an upcoming training record expiry.

Expiries are colour coded, based on their active status in the system.

Active Expiring Soon Expired

Expiry Date	Price	
4/3/2014	\$0.00	⊖
8/30/2013	\$0.00	⊖
5/31/2013	\$25.00	⊖

- Active (green): Expiry is greater than 60 days from today
- Expiring Soon (yellow): Expiry is less than 60 days from today
- Expired (red): Expiry is date is after today

Delete Individual Training Records



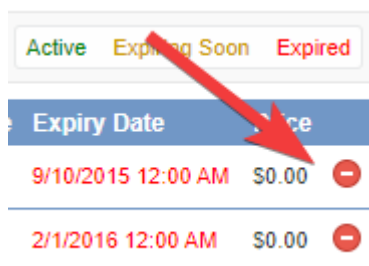
Deletion permanently removes the record from the system, including associated attachment and reports.

Permanently delete one or more training records from an individual's profile.

1. Navigate to the User Accounts page.
2. Select an account name to open the individual's profile.
3. Select **Supplemental Training** from the Sections menu on the right. If you can't see the menu, show the [Tool Panel](#) .



4. Select the delete icon for the appropriate training record.



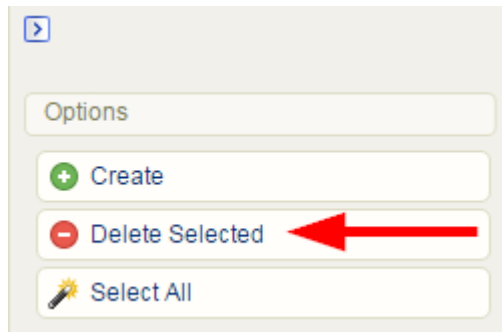
Delete Multiple Training Records



Deletion permanently removes the records from the system, including associated attachments and reports.

1. [Navigate to the Supplemental Training page](#) .
2. Optionally use [Filter and Save Searches](#) .
3. [Select](#) one or more records.
4. Choose **Delete Selected** from the Options menu. If you cannot see the menu, show the [Tool Panel](#)

.



5. Confirm the deletion.