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).

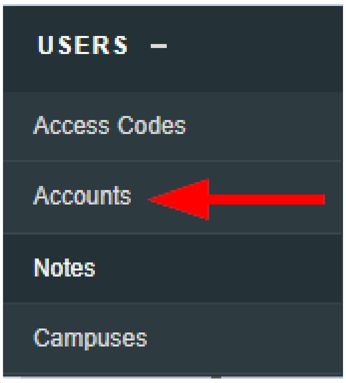
This manual may reference features not configured for your system or features may be named differently due to site customizations. Informetica is under constant development and some differences between the live application and this manual may occur.

Navigate to User Accounts

This feature is available to Site Managers , Managers , and Course Authors , depending on system configuration.

Site Manager Navigation

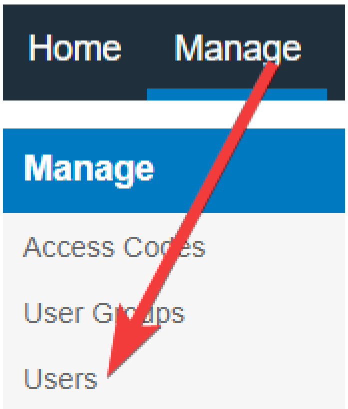
1. Select **Accounts** from the Users tab.



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.

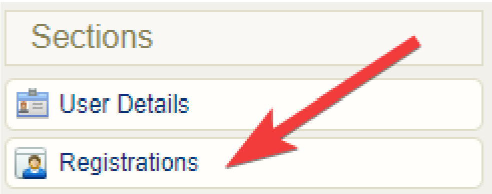
Campus Enrolments

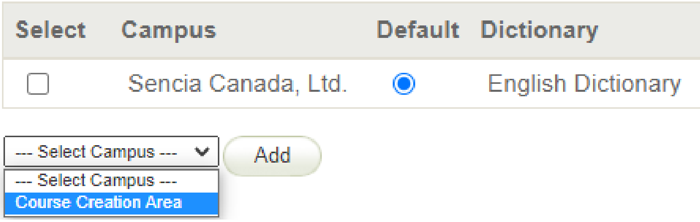
This feature is available to Site Manager and Manager accounts depending on system configuration.

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.





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

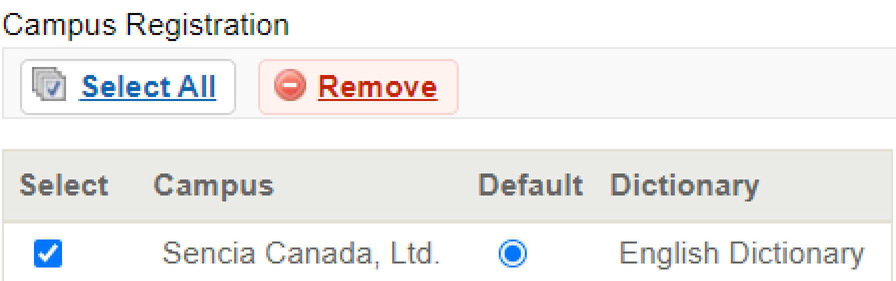
1. Log in with Site Manager or Manager account.

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.



The system requires the user to remain enroled 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.

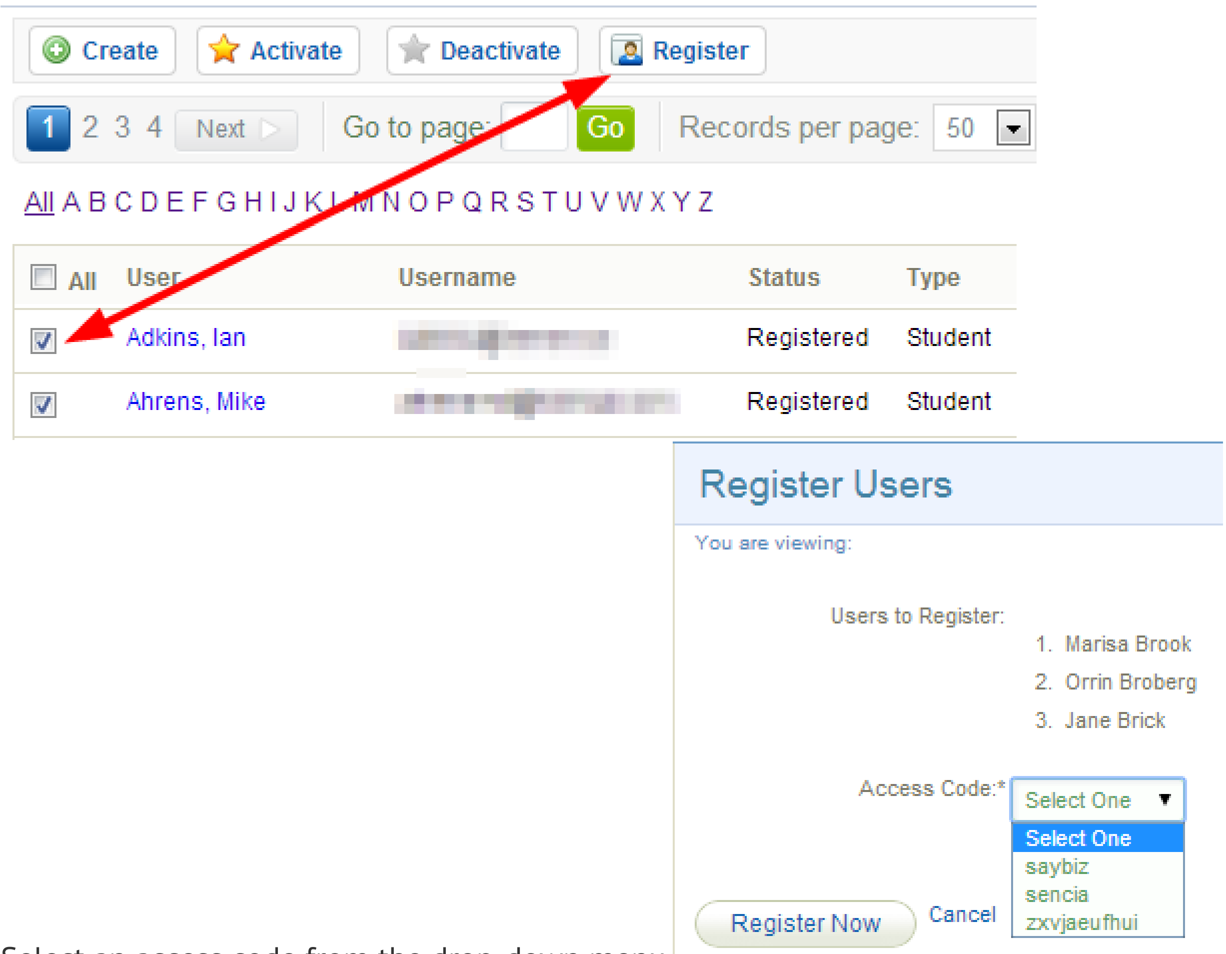
Manager accounts must have an access code made available to them before they can enrol users to a product unless they are using the Scheduling Tool. For some systems, a Site Manager may need to create and set up the access code on your behalf. See **Access Codes** for more details.

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 enroled via an access code are enroled 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 enroled or select **All** to select all users on the page.
4. Select **Register** at the top of the list.



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 enroled 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 enroled 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.

Product Exceptions

Create Activate | Deactivate | Delete

	Products	Description	Start Date	End Date	Duration	Status
☐	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.

Maria Bennet: Exceptions

You are viewing: Users > Accounts > Maria Bennet: Exceptions

Asset Exceptions

Create Activate | Deactivate | Delete

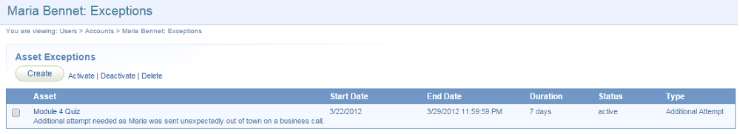
	Asset	Start Date	End Date	Duration	Status	Type
☐	Module 4 Quiz Additional attempt needed as Maria was sent unexpectedly out of town on a business call.	3/22/2012	3/29/2012 11:59:59 PM	7 days	active	Additional Attempt

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.

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

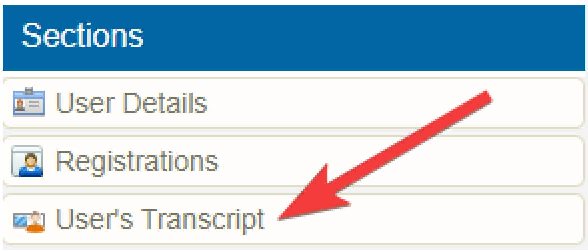
The User Course Registration Import Utility can be used for bulk updates of duration days. In step three of the import, you can match Duration Days to your Excel template to create different durations or enter a number directly in the Import Utility in the Duration Days field to give every user in the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

View a User's Transcript

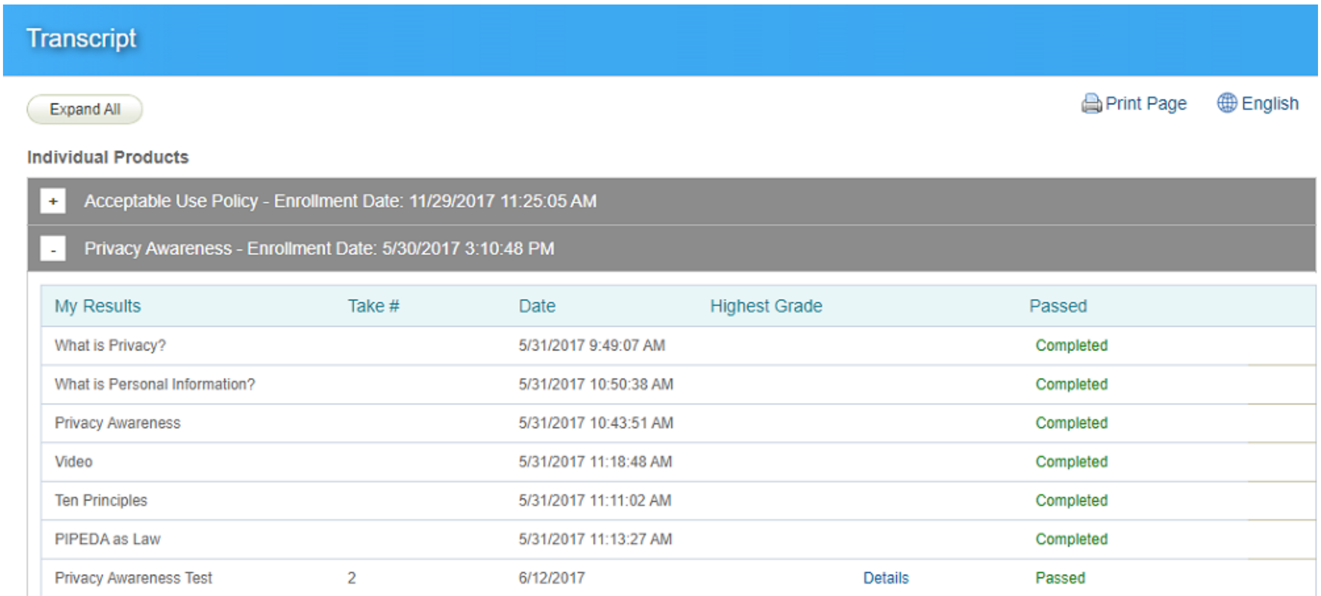
This feature is available to Site Manager , Manager , Course Author , Instructor , and Help Desk accounts, depending on system configuration.

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.



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



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

Supplemental Training

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.

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

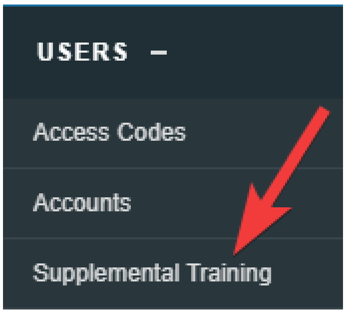
Title	Vendor	Instructor	Location	Description	Attachment	Start Date	End Date	Expiry Date	Price
OR Clinical Shift			Thunder Bay Regional Health Sciences Centre		clinical_hours_summary_-_or_.pdf	10/10/2014 12:00 AM	10/21/2014 12:00 AM	1/1/2015 12:00 AM	$0.00
ER Clinical Shift			Thunder Bay Regional Health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

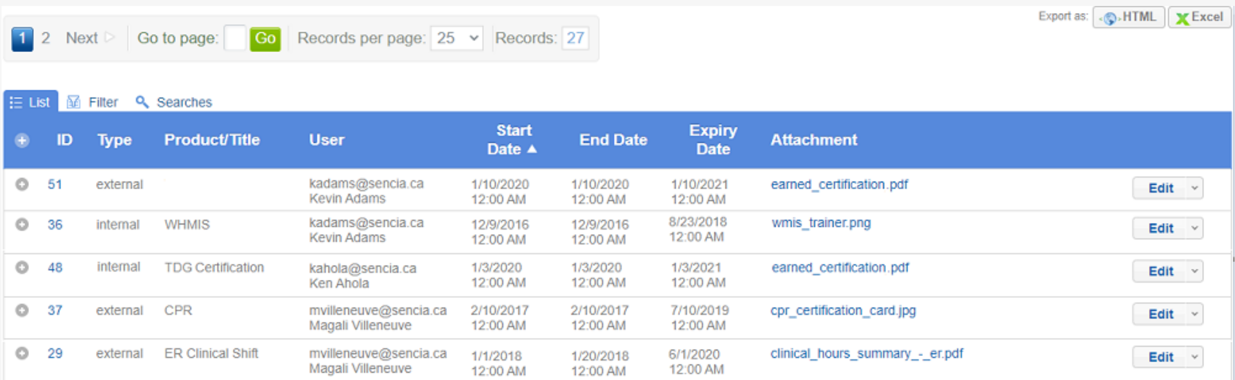
From this page you can view, sort, filter, export, delete, and edit exisiting supplemental training items for multiple users. The page displays the ID, type, associated product or title, user, various dates, and any attachments for each entry.

1. Log in with a Manager or Site Manager account type.
2. Select **Supplemental Training**. The location of Supplemetal 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.



- 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 enroled 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

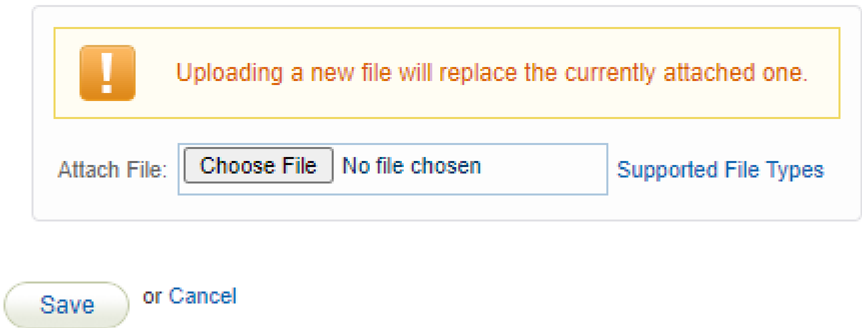
You can pre-upload training record attachments in bulk via your FTP account, and then attach the uploaded files to one individual's training records with the Manage FTP Tool.

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.

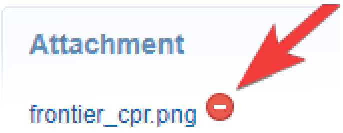


4. Save.

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

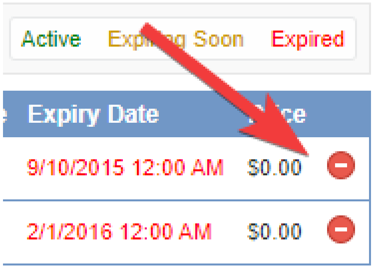
Delete Individual Training Records

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

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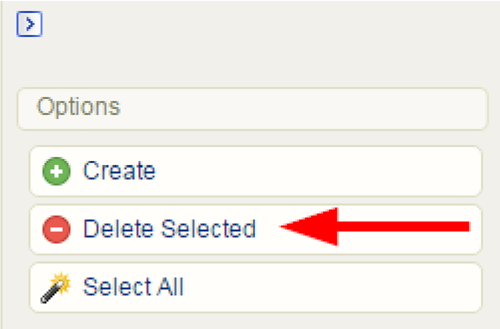

5. Confirm the deletion.