

VanEd LMS Platform

Manager-Level Access User Guide

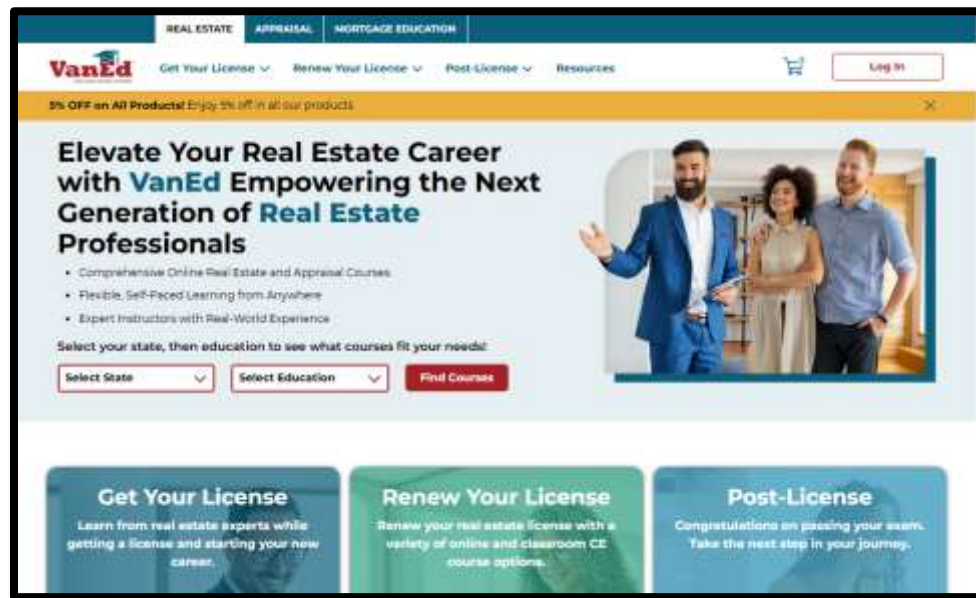
This document will guide you through the features and benefits available with FULL MANAGER ACCESS.

- **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

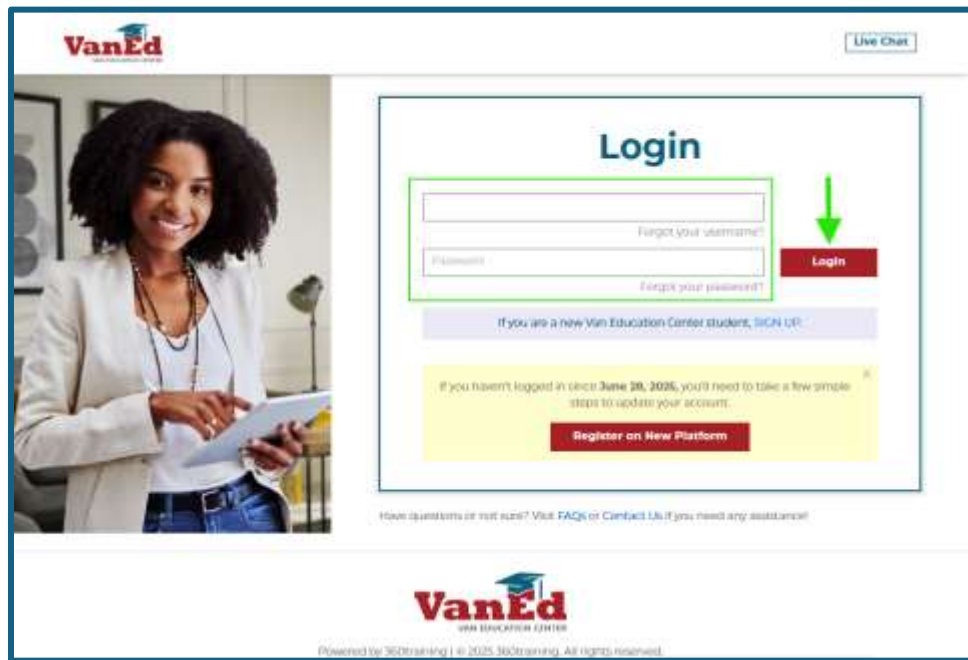
LOGIN

Go to www.vaned.com and click LOGIN.



For Immediate Assistance:

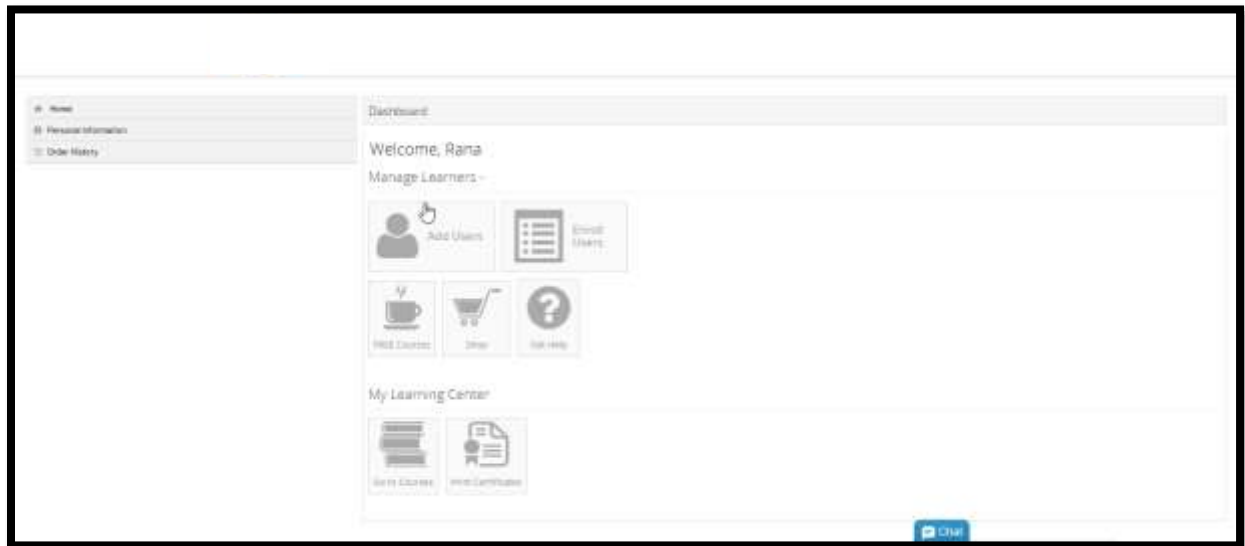
Enter your Email Address and Password, then click **Login**.



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.



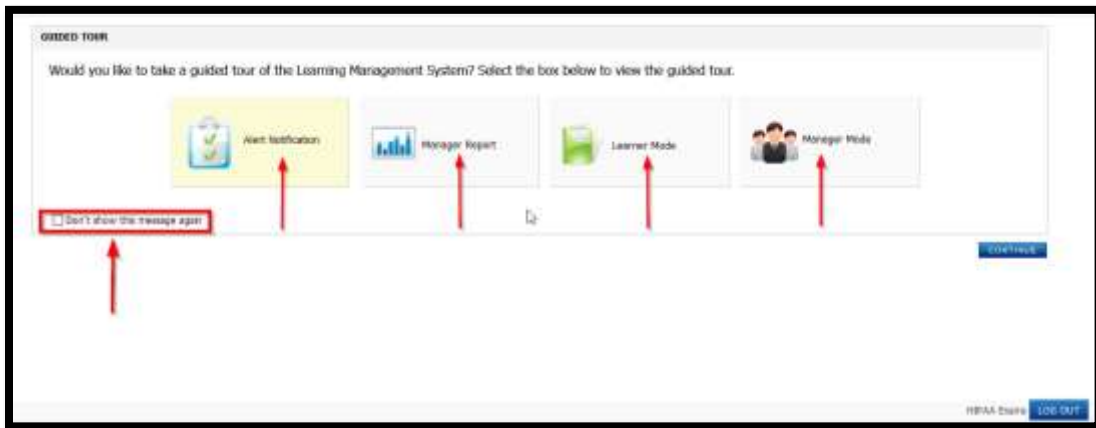
OR

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



STEP 3 GUIDED TOUR

You may choose to step through tutorials or click CONTINUE.



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.

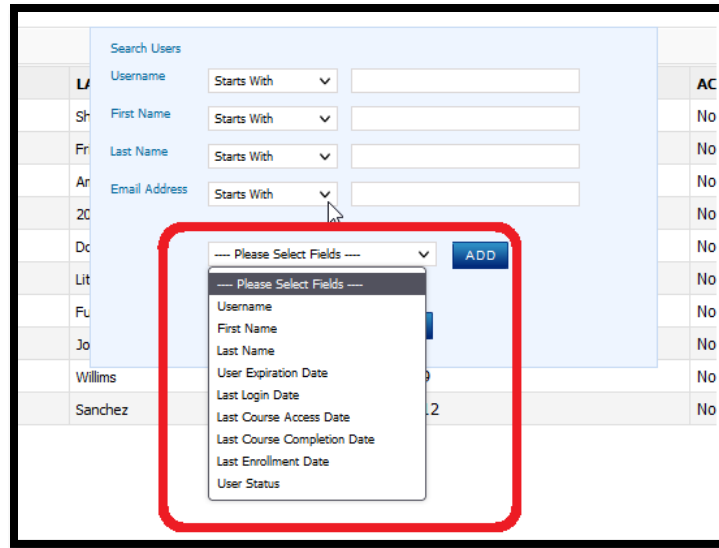


Click the SEARCH button to search by username, first name, last name, or email address.

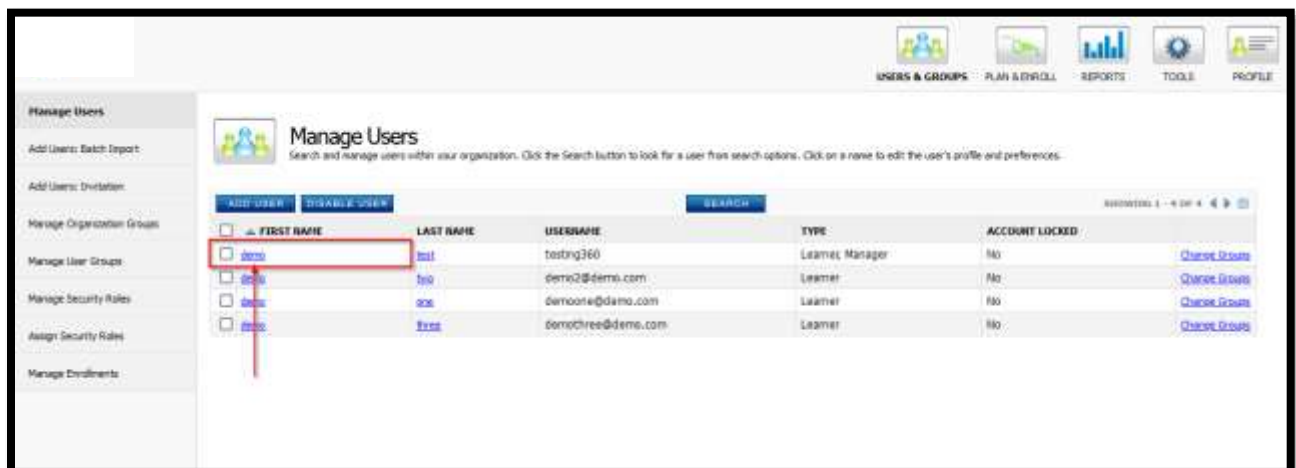


To select additional search options or fields, click ADD for fields such as user expiration date, last login date, last course access date, last course completion date, last enrollment date, **and** user status.

For Immediate Assistance:



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

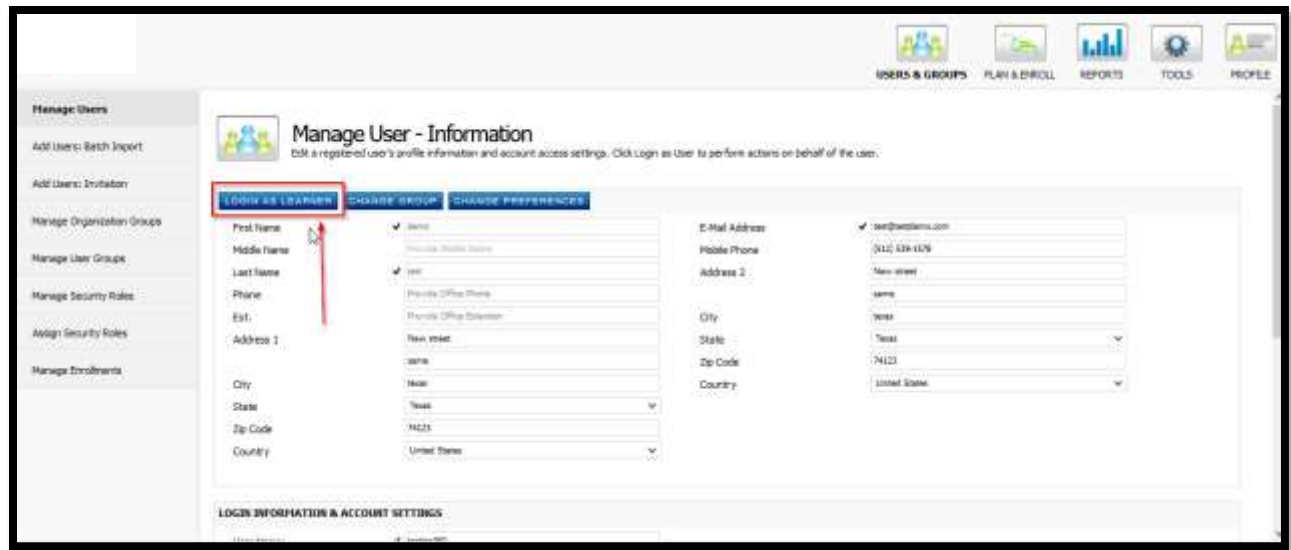


This opens the user profile page.

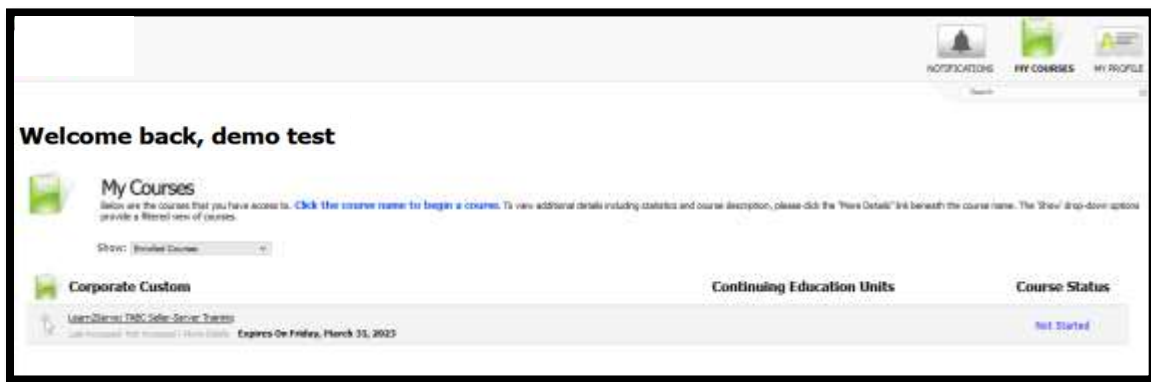
NOTE: You can edit all user details, including password, except for username.

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.

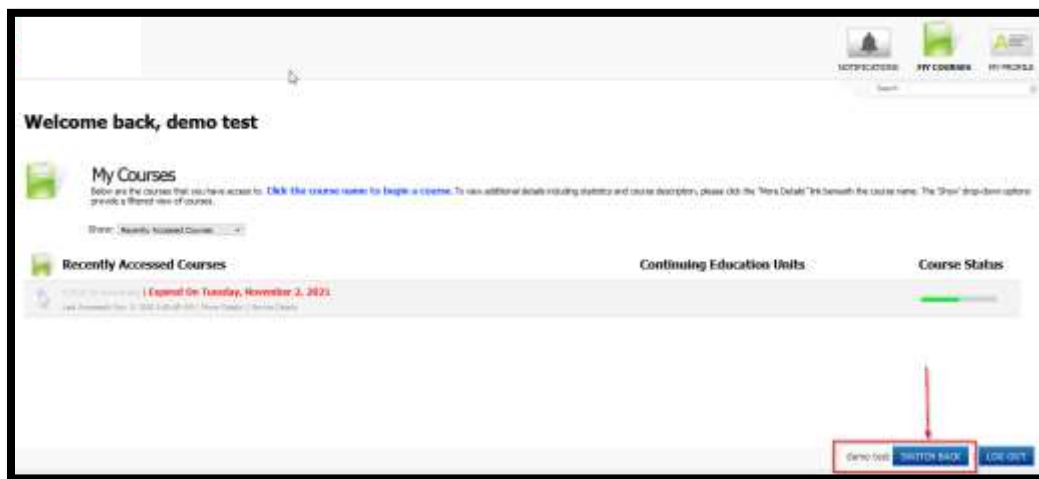
Click the LOGIN AS LEARNER button to access course completion records.



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.



For Immediate Assistance:

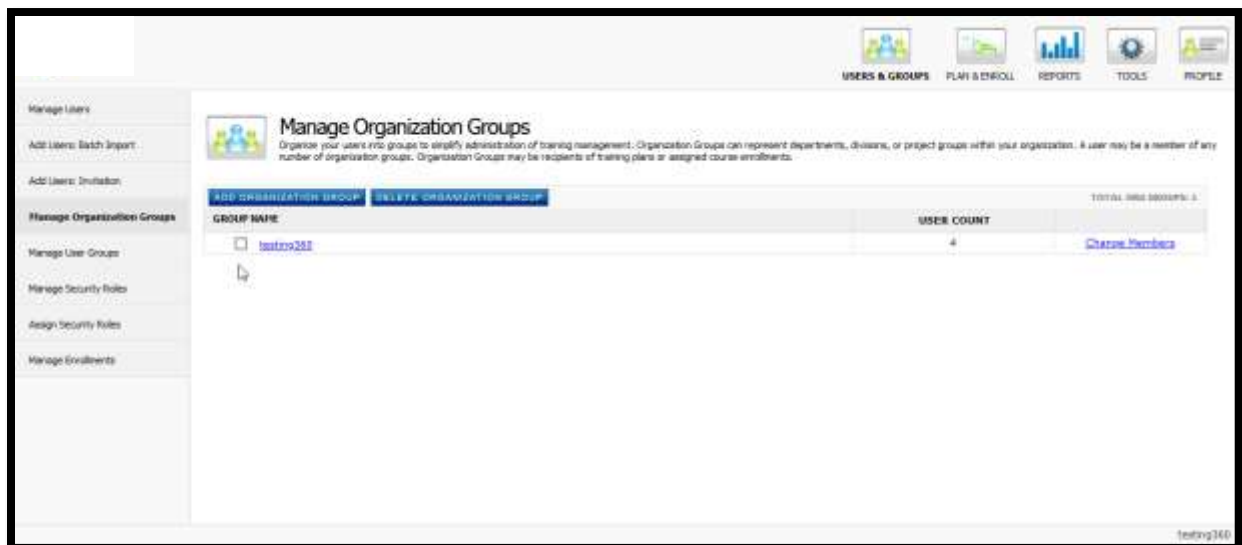
STEP 6

MANAGE ORGANIZATION GROUP

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



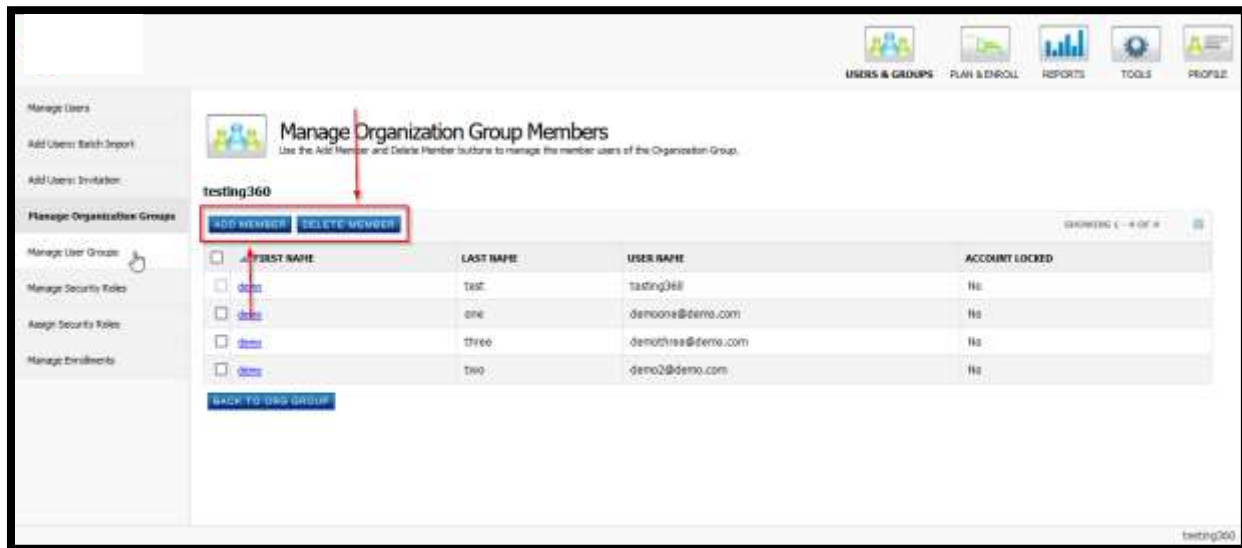
You can view the organization groups by clicking on the group names.



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



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



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.

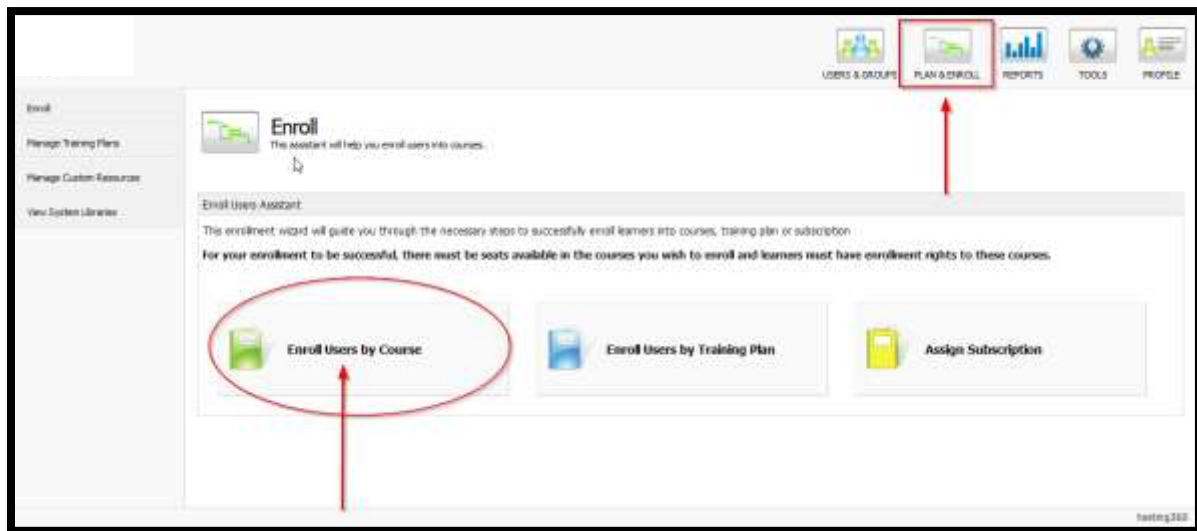
There are two options available: ADD USER GROUP or DELETE USER GROUP.



STEP 8

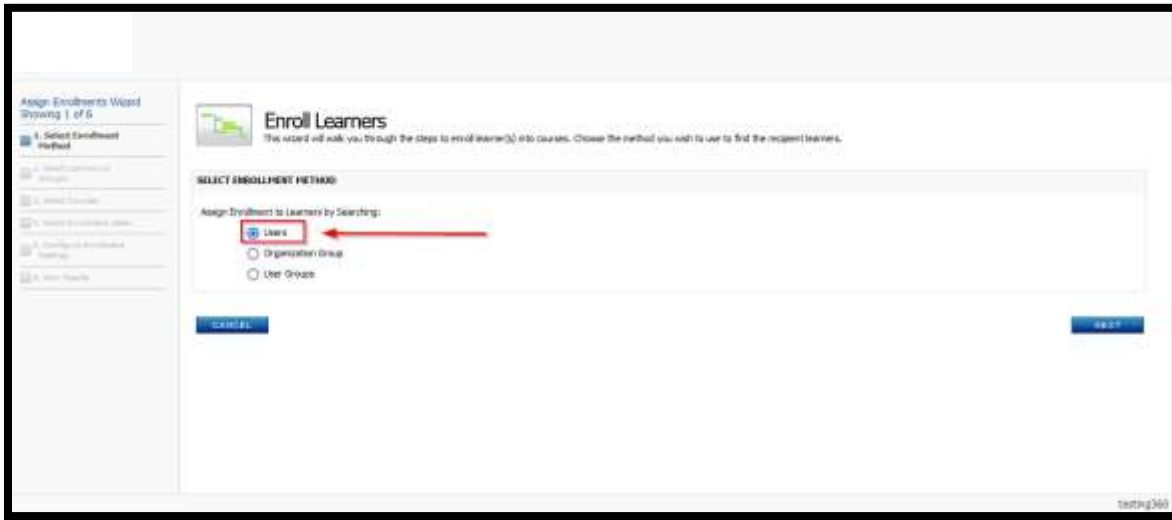
PLAN & ENROLL

Select ENROLL USERS BY COURSE

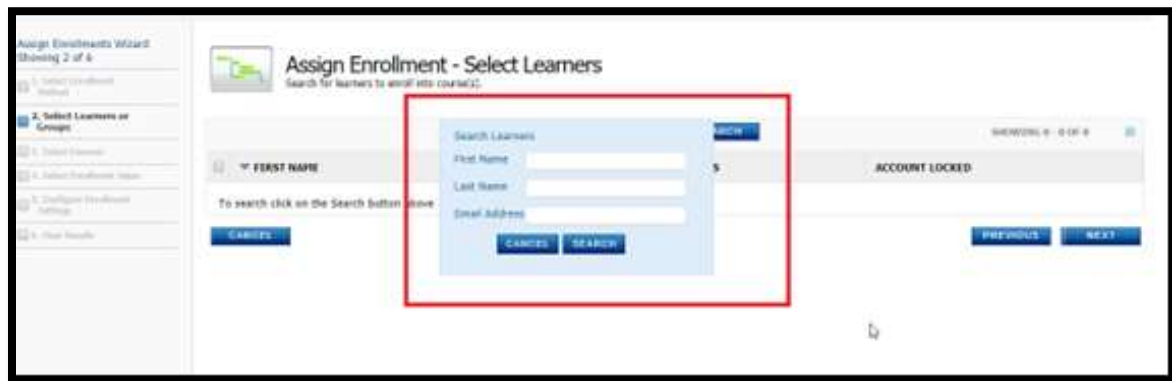


For Immediate Assistance:

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	demathree@demo.com	No

CANCEL PREVIOUS NEXT

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

Mile Expiration Date

CANCEL SEARCH

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

CANCEL PREVIOUS NEXT

Select the desired course from the results.

Assign Enrollments Wizard
Showing 3 of 8

1. Assign Enrollments Wizard
2. Select Courses or Groups
3. Select Courses
4. Select Enrollment Dates
5. Configure Enrollment Settings
6. View Results

Assign Enrollment - Select Courses

Select the courses you wish to enroll learners into.

SEARCH

Showing 1 - 2 of 2

<input type="checkbox"/>	COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	TOTAL SEATS	USED	REMAINING	EXP. DATE	SUBSCRIPTION
<input type="checkbox"/>	Learn2Serve: TABC Seller-Server Training	PSALTXD417078	Food and Beverage Programs > Food Handler Training > Food	DEMO for 360 Training - Unlimited	0	Unlimited	02/29/2024	
<input type="checkbox"/>	Learn2Serve: TABC Seller-Server Training	PSALTXD417078	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 Enrollments Wizard
Showing 4 of 8

1. Assign Enrollments Wizard
2. Select Courses or Groups
3. Select Courses
4. Select Enrollment Dates
5. Configure Enrollment Settings
6. View Results

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.

Assign Enrollment - Assignment Options

Select options for this course enrollment. Duplicate enrollments will be either updated to the new enrollment in the training plan or ignored per your selection.

SUMMARY

Duplicates	<input type="radio"/> Ignore	<input checked="" type="radio"/> Update
Notify me upon confirmation	<input checked="" type="radio"/> Yes	<input type="radio"/> No

Send Enrollment confirmation to Learners

☐ Yes ☒ No

PREVIOUS FINISH

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

Assign Enrollment - Results

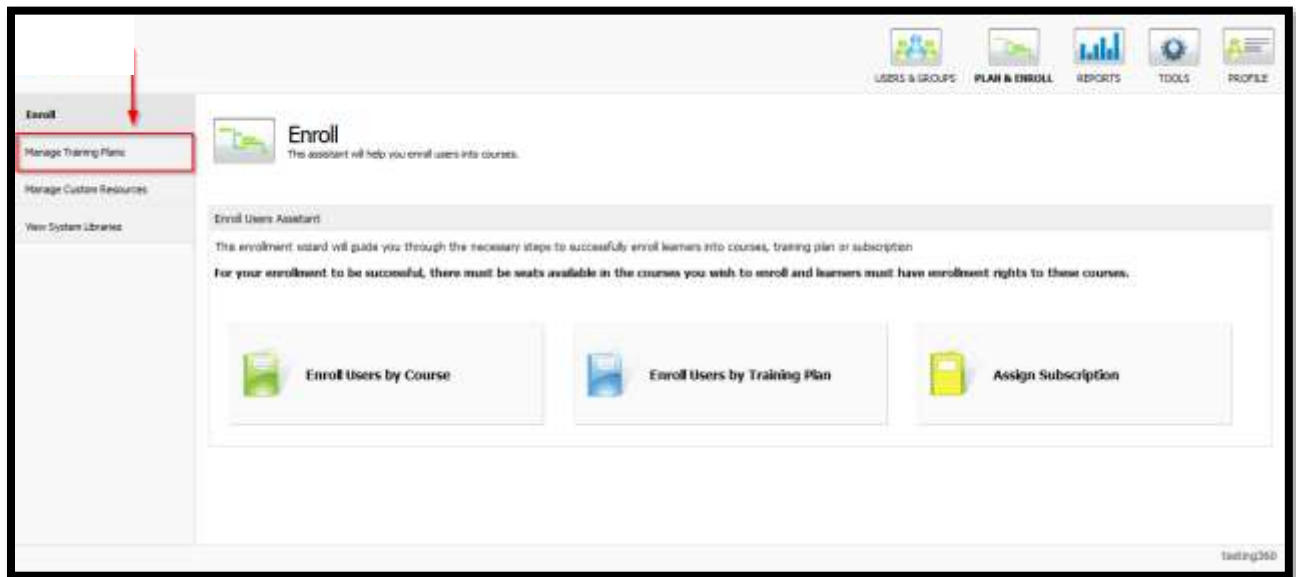
SUMMARY INFORMATION

Number of learners attempted to enroll	1
Number of courses assigned	1

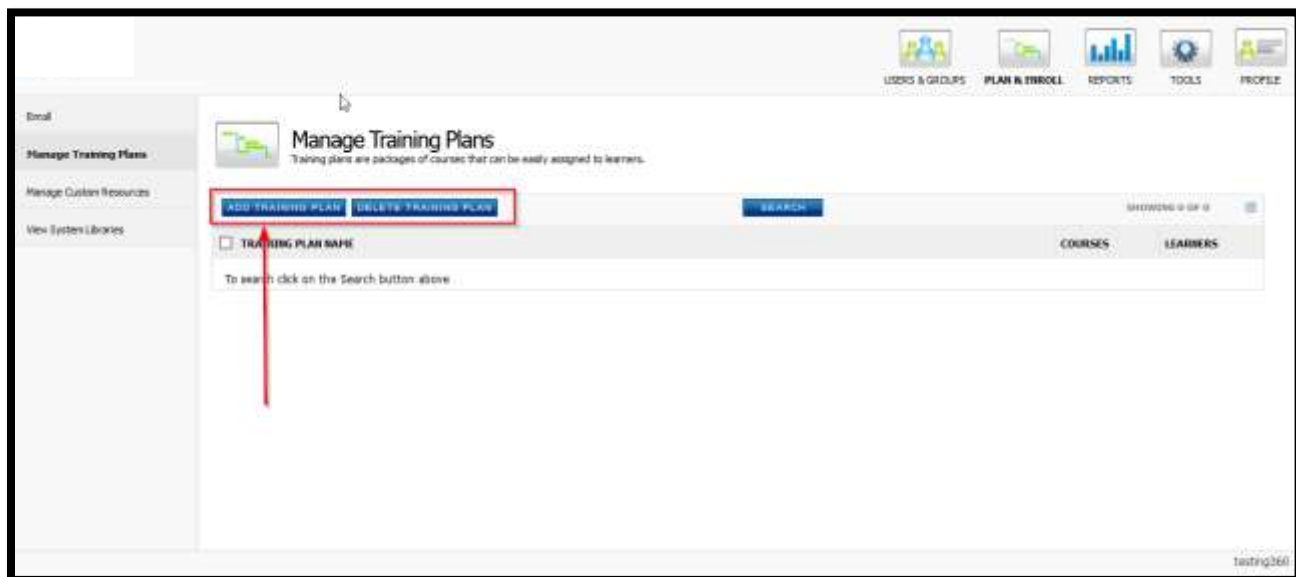
The enrollment process has been started. This may take 10-15 minutes to complete depending upon how many students you are enrolling. An email confirmation will be sent to your email address once the process has been completed.

GO

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 in the 'Summary' step. The 'Training Plan Name' field contains 'DEMO TRAINING' and the 'Description' field also contains 'DEMO TRAINING'. A red rectangular box highlights these two input fields. At the bottom right, a red arrow points to the 'NEXT' button. The 'CANCEL' button is at the bottom left. The top navigation bar includes 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The left sidebar shows 'Add New Training Plan Wizard Showing 1 of 3' with steps 1, 2, and 3.

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 in the 'Selected Courses' step. A search modal is open with the following fields: 'Course Name', 'Contract Name', 'Business Key', and 'Max Expiration Date'. A red arrow points to the 'SEARCH' button in the modal. The modal also has 'CANCEL' and 'SEARCH' buttons at the bottom. The background shows the 'COURSES' section with a 'COURSE NAME' checkbox and a 'To search click on the Search button above' instruction. The 'PREVIOUS' and 'NEXT' buttons are at the bottom right. The top navigation bar and left sidebar 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.

The screenshot shows the 'Add Training Plan' interface. On the left, a sidebar indicates the current step is '3. Selected Courses'. The main area has a title 'Add Training Plan' with the instruction 'Select Course(s) to add to Training Plan.' Below this is a table of available courses. A 'SEARCH' button is located at the top right of the table area. At the bottom of the table are 'CANCEL', 'PREVIOUS', and 'NEXT' buttons.

COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	EXPIRATION DATE	CONTRACT NAME
<input checked="" type="checkbox"/> Aprender a servir: Capacitación de TABC para vendedores/camareros	PSALT00513090	Food and Beverage Programs ->Food Handler Training ->Texas	02/26/2024	DEMO for 360 Training
<input checked="" type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALT00417078	Food and Beverage Programs ->Food Handler Training ->Texas	02/29/2024	DEMO for 360 Training

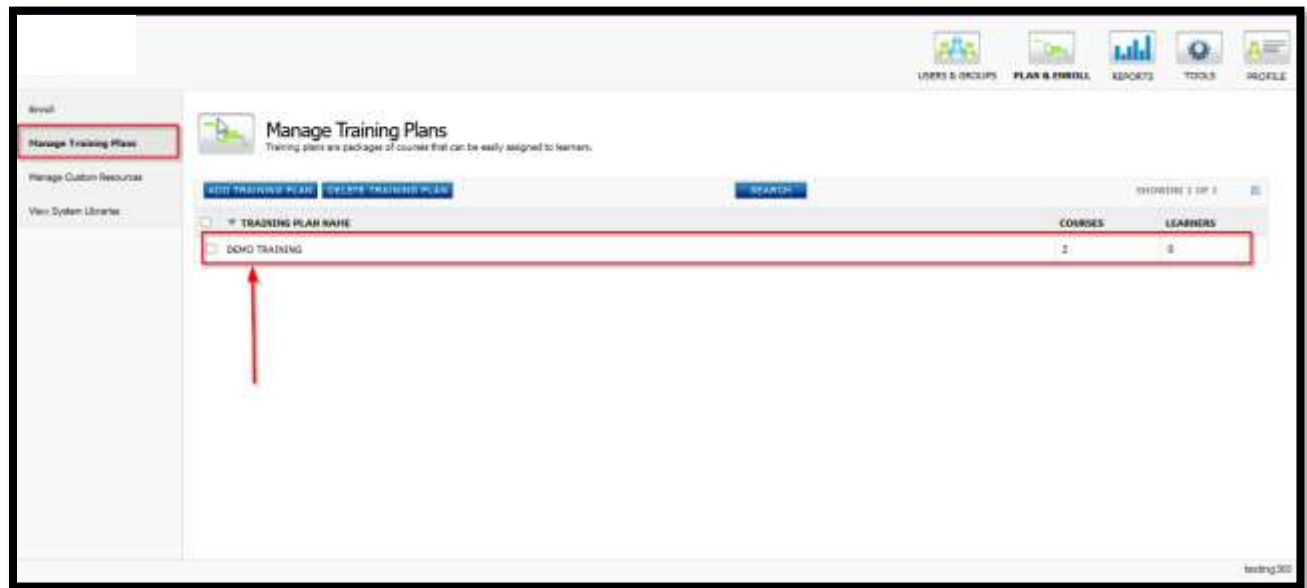
Training Plan enrollment is done. Below is a summary of the contracts/entitlements used in the training plan setup process. Once ready to proceed with the training plan, click finish.

The screenshot shows the 'Add Training Plan' interface at the 'SUMMARY' step. The sidebar indicates the current step is '3. Confirmation'. The main area shows a summary of the training plan with fields for 'Training Plan Name' (DEMO TRAINING) and 'Description' (DEMO TRAINING). Below this is a list of enrolled courses. A red box highlights the 'COURSE' section, and a red arrow points to the 'FINISH' button at the bottom right.

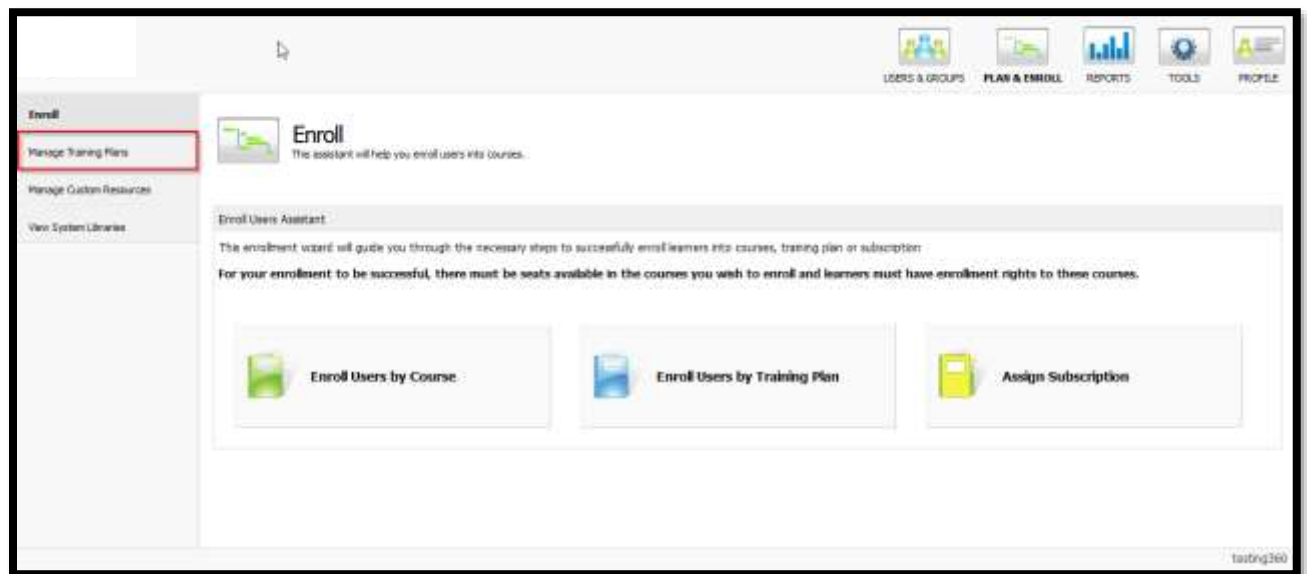
COURSE	COURSE NAME
<input checked="" type="checkbox"/>	Aprender a servir: Capacitación de TABC para vendedores/camareros
<input checked="" type="checkbox"/>	Learn2Serve: TABC Seller-Server Training

For Immediate Assistance:

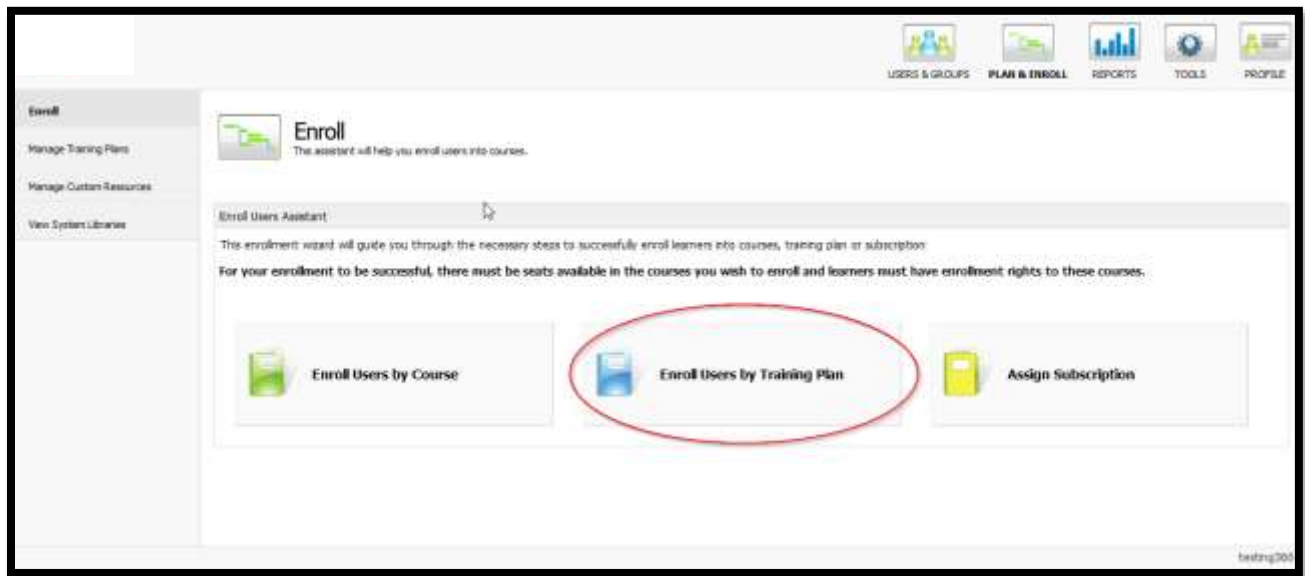
Now again click on Manage training plans and click the search button to view the new training plan created or any previous training plans created.



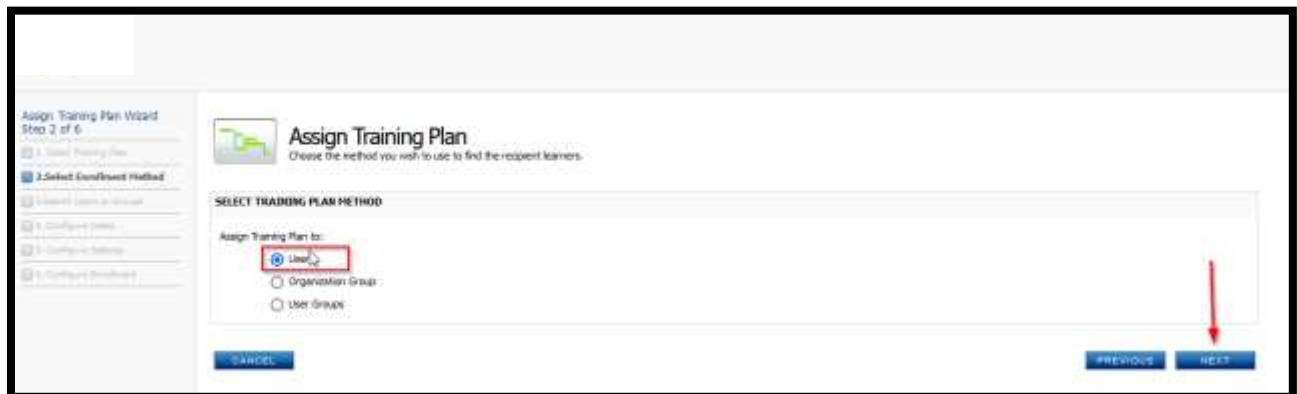
Select ENROLL USERS BY TRAINING PLAN



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 Search and Select Courses
3 Search Users or Groups
4 Configure Dates
5 Configure Settings
6 Configure Enrollment

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

SEARCH

SHOWING 1 - 1 OF 1

FIRST NAME	LAST NAME	USER NAME	SECURITY ROLE	ACCOUNT LOCKED
demo	test	testing160	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 Search and Select Courses
3 Search Users or Groups
4 Configure Dates
5 Configure Settings
6 Configure Enrollment

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 → 01/01/2023

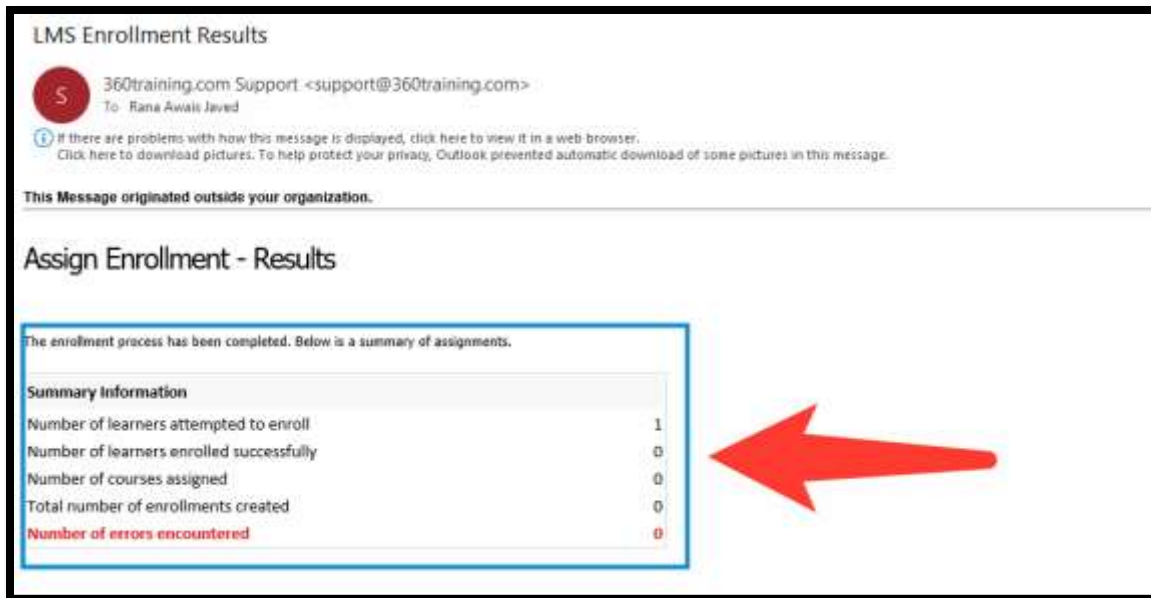
End Date → 01/01/2024

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

CANCEL PREVIOUS NEXT

The following two steps are default actions. We recommend continuing with the system options as they are selected.

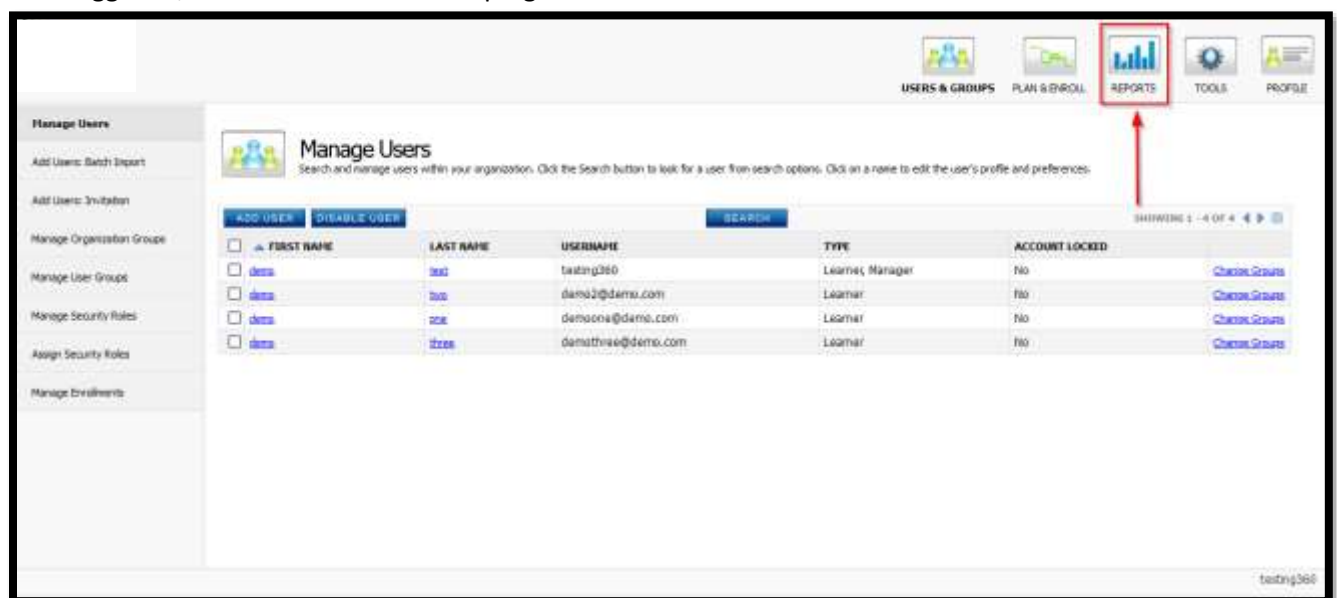
Email will be received as a confirmation of LMS Enrollment Results.




STEP 9






REPORTS – Tracking progress via On-Demand Reports

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



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



Welcome to the Report Center

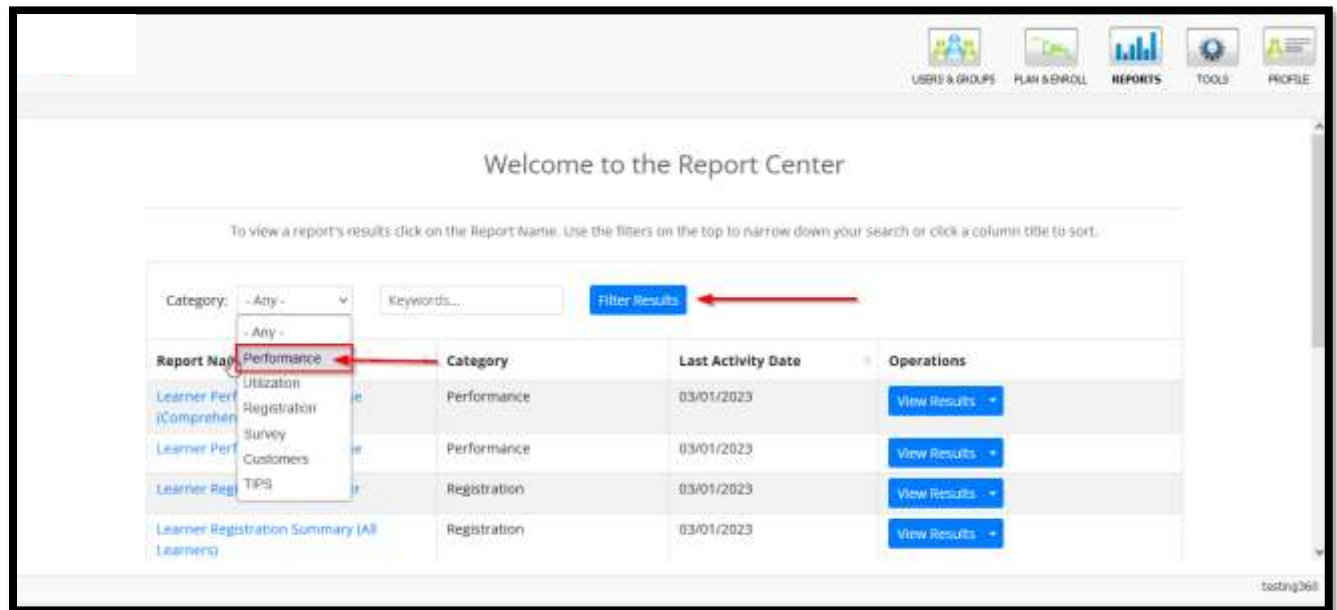
To view a report's results click on the Report Name. Use the filters on the top to narrow down your search or click a column title to sort.

Category: - Any -

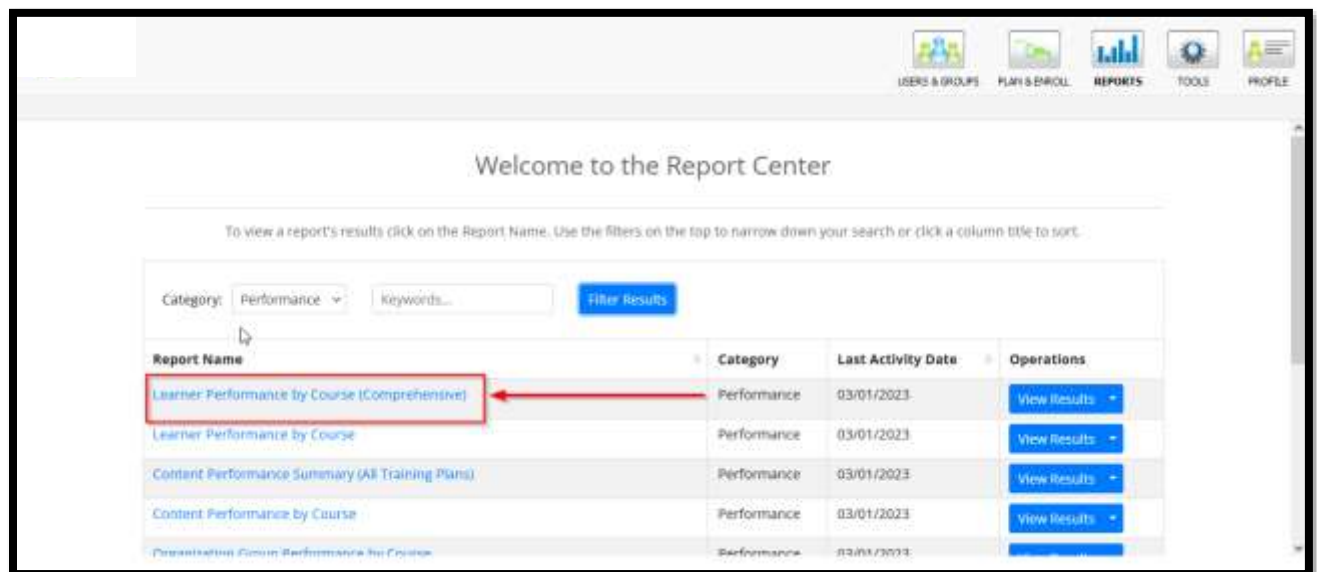
Report Name	Category	Last Activity Date	Operations
Learner Performance by Course (Comprehensive)	Performance	03/01/2023	View Results
Learner Performance by Course	Performance	03/01/2023	View Results
Learner Registration by Learner	Registration	03/01/2023	View Results
Learner Registration Summary (All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

training360

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.

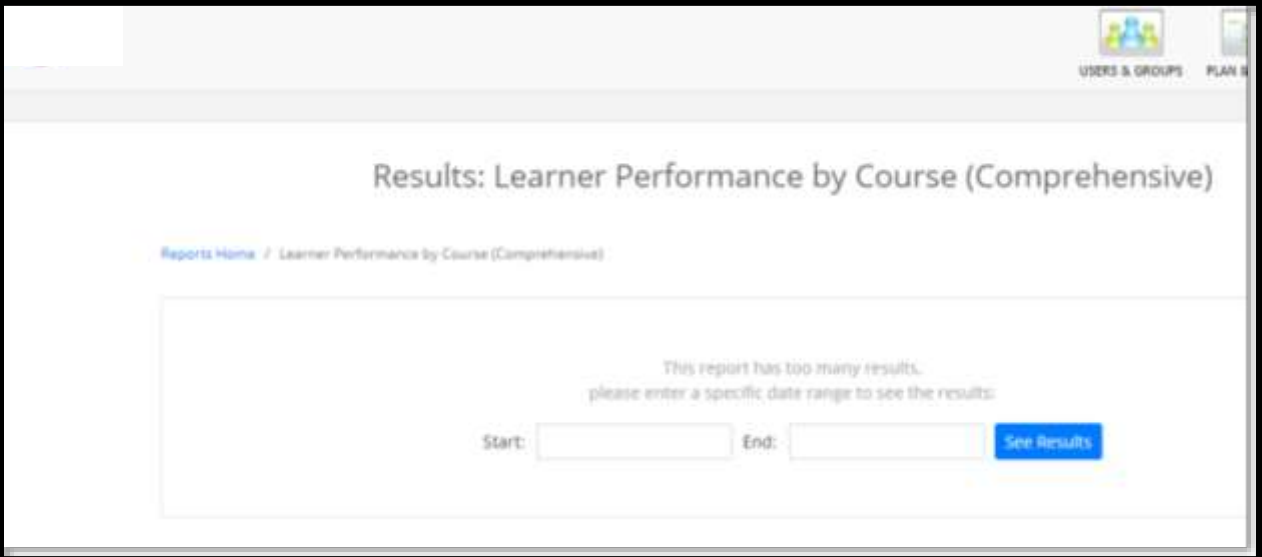


To run the report, click on the report name.



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.



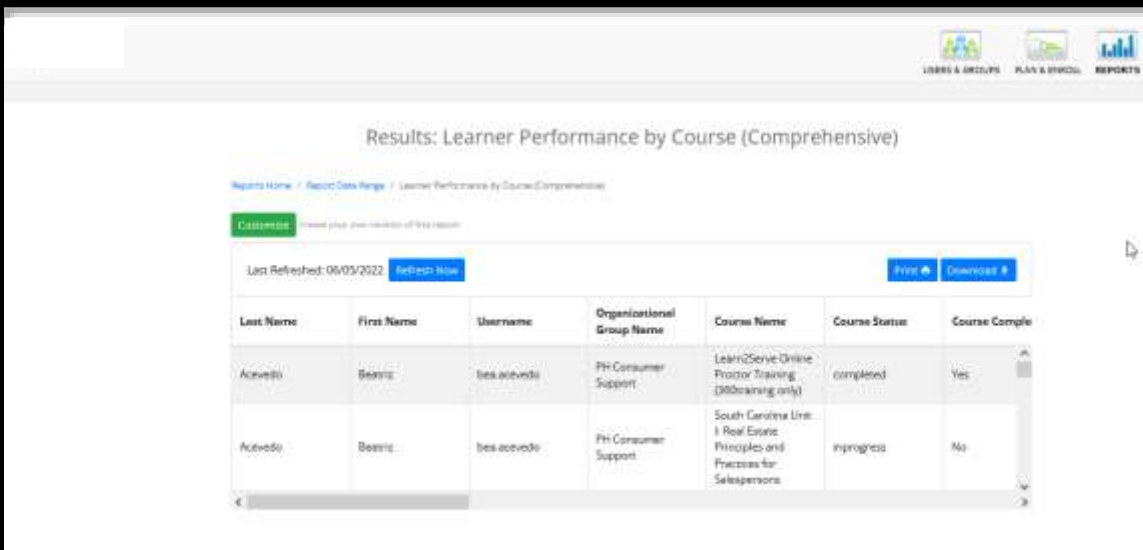
Results: Learner Performance by Course (Comprehensive)

Reports Home / Learner Performance by Course (Comprehensive)

This report has too many results.
please enter a specific date range to see the results:

Start: End: [See Results](#)

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.



Results: Learner Performance by Course (Comprehensive)

Reports Home / Report Date Range / Learner Performance by Course (Comprehensive)

[Collapse](#) Expand plus icon hidden if this report

Last Refreshed: 06/03/2022 [Refresh Now](#) [Print](#) [Download](#)

Last Name	First Name	Username	Organizational Group Name	Course Name	Course Status	Course Complete
Acavado	Bessie	bess.acavado	PH Consumer Support	Learn2Serve Online Proctor Training (360training only)	completed	Yes
Acavado	Bessie	bess.acavado	PH Consumer Support	South Carolina Unit 1 Real Estate Principles and Practices for Salespersons	inprogress	No

STEP 10

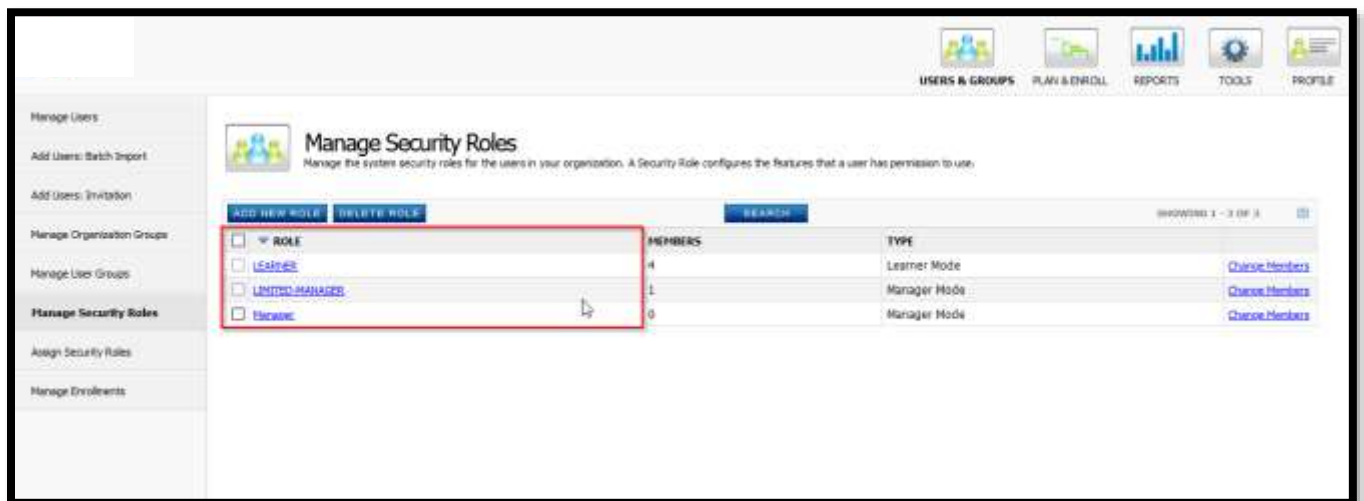
MANAGE SECURITY ROLES

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

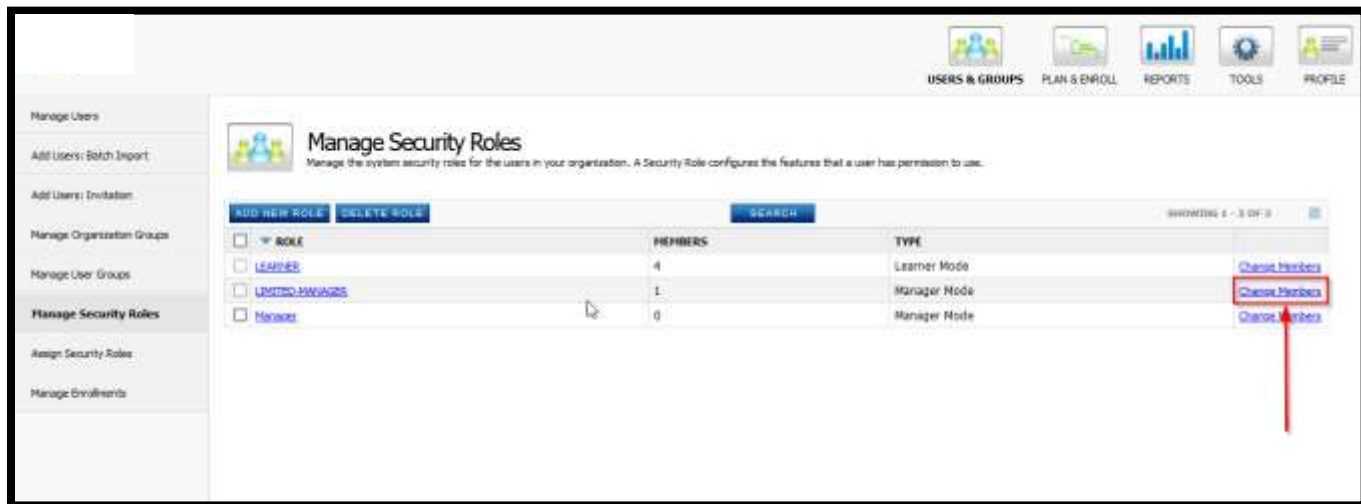
You can add a new role or delete a role by clicking SEARCH. This will allow you to view the security roles.



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.



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.

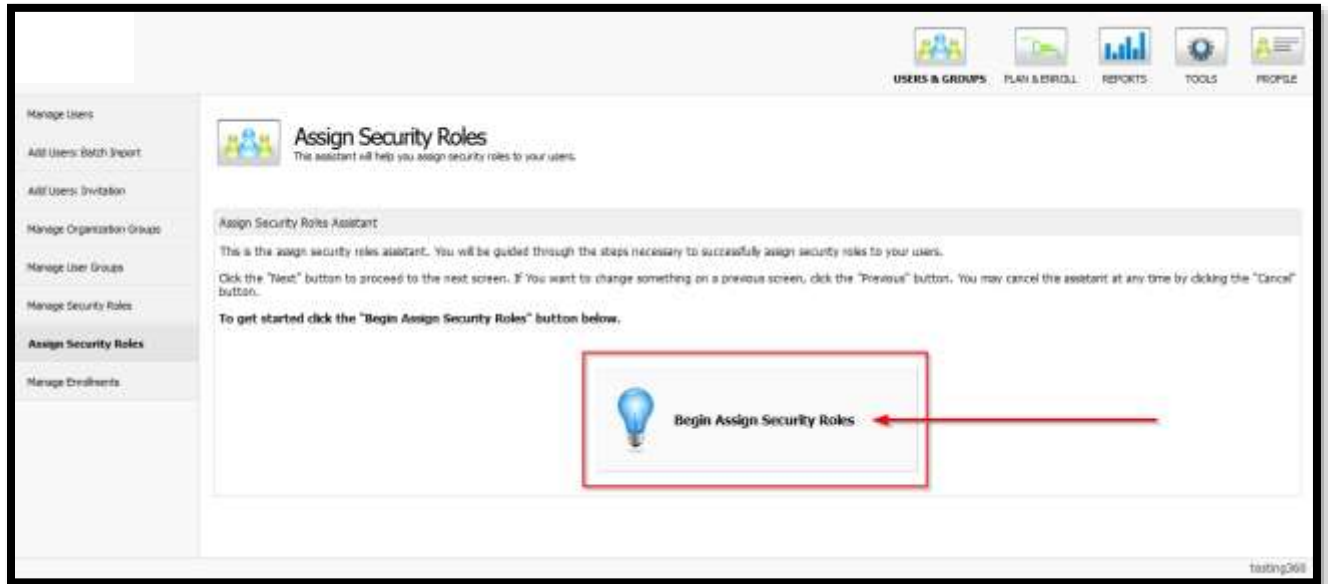


STEP 11

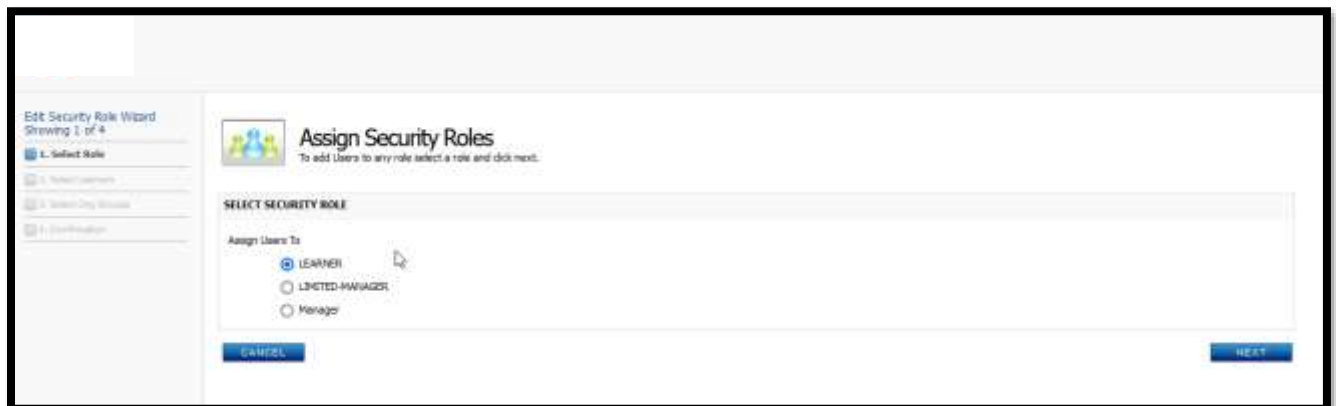
ASSIGN SECURITY ROLES

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.

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

SEARCH

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

Click FINISH and a confirmation window will appear.

STEP 12

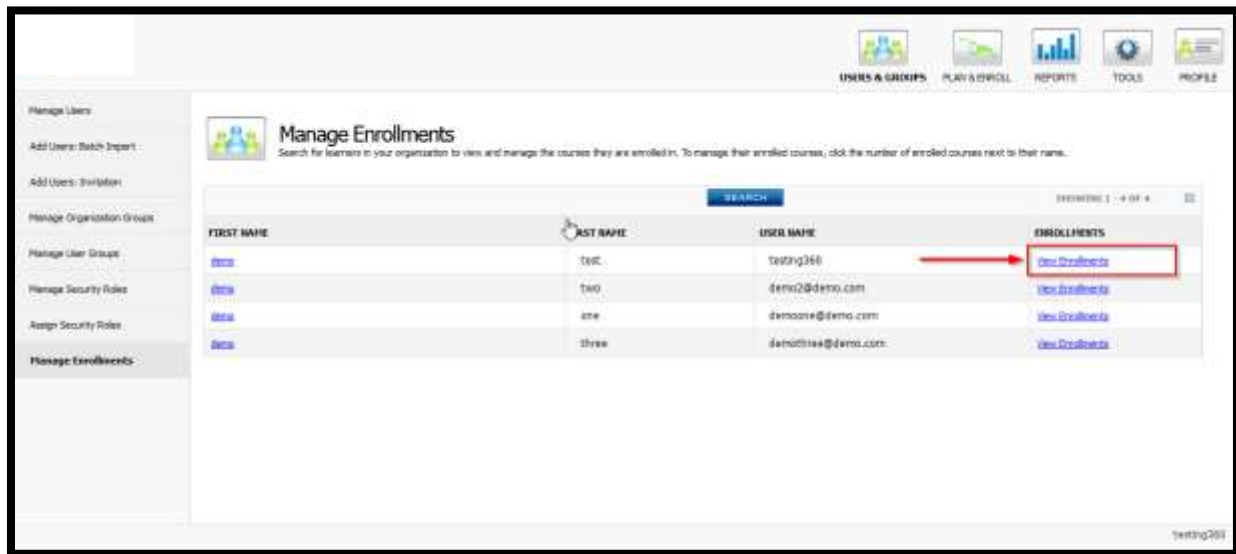
MANAGE ENROLLMENTS

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.



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

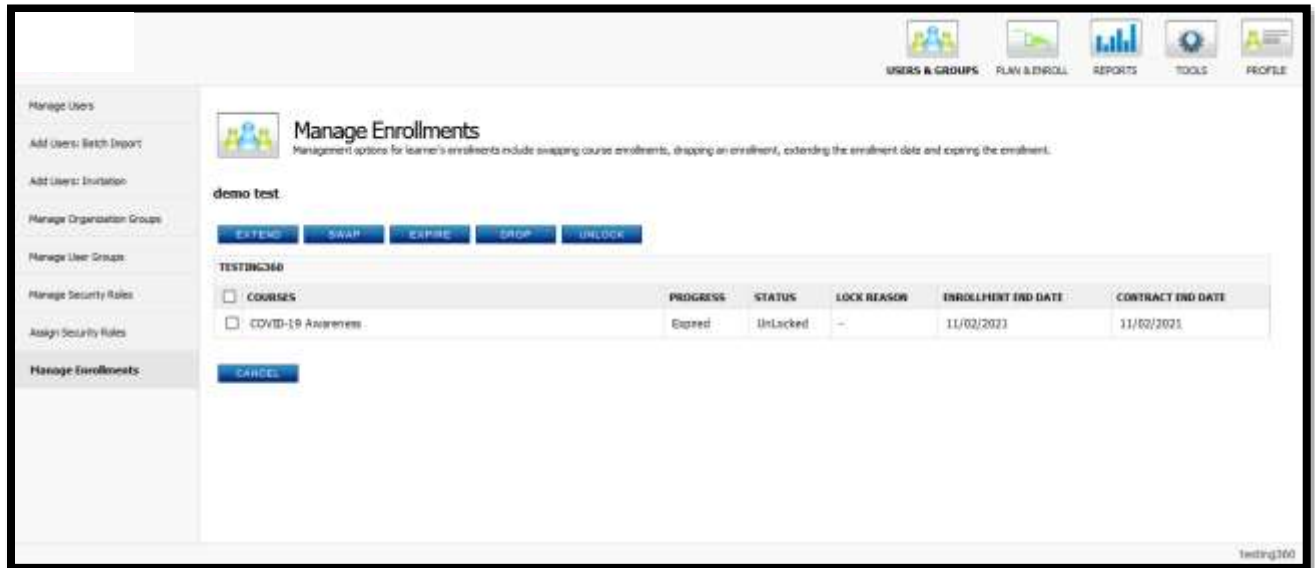
Click VIEW ENROLLMENTS.



For Immediate Assistance:

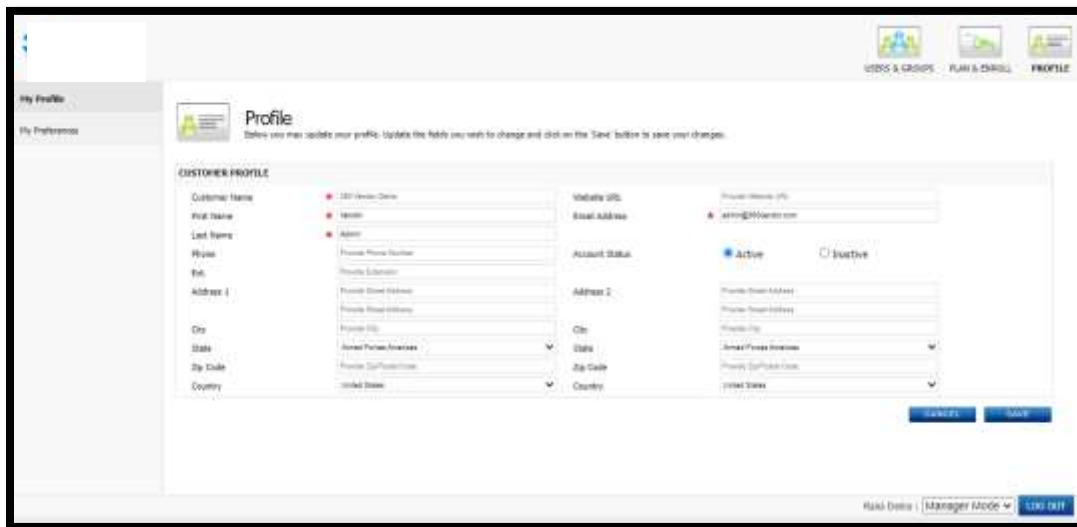
Now you can view the following columns: courses, progress, status, lock reason and enrollment end/start date. You then have the options to:

- 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)



Profile

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



For Immediate Assistance:

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.

The screenshot shows the 'Manage Users' interface. At the top right, there are three icons: 'USERS & GROUPS', 'PLAN & ENROLL', and 'PROFILE'. The main header 'Manage Users' includes a search bar and instructions: '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.' Below this is a table with columns: 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. The table lists several users, including 'Adrian', 'Sally Adams', 'Brenda', 'Charles', 'Clinton', 'Clinton', 'DANIELA', 'Demo', 'Demo', 'Demo', and 'Demo'. At the bottom right, there is a mode switcher with three options: 'Learner Mode', 'Manager Mode', and 'Manager Mode'. A red arrow points to the 'Manager Mode' option. A 'LOG OUT' button is also visible.

FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED
Adrian	Adrian	adrian@360training.com	Learner	No
Sally Adams	Sally Adams	sally@360training.com	Learner	No
Brenda	Brenda	brenda@360training.com	Learner	No
Charles	Charles	charles@360training.com	Learner	No
Clinton	Clinton	clinton@360training.com	Learner	No
Clinton	Clinton	clinton@360training.com	Learner	No
DANIELA	DANIELA	daniela@360training.com	Learner	No
Demo	Demo	demo@360training.com	Learner	No
Demo	Demo	demo@360training.com	Learner	No
Demo	Demo	demo@360training.com	Learner	No
Demo	Demo	demo@360training.com	Learner	No

Mode Switcher: Learner Mode, **Manager Mode**, Manager Mode, LOG OUT