

VanEd LMS Platform

Manager-Level Access User Guide

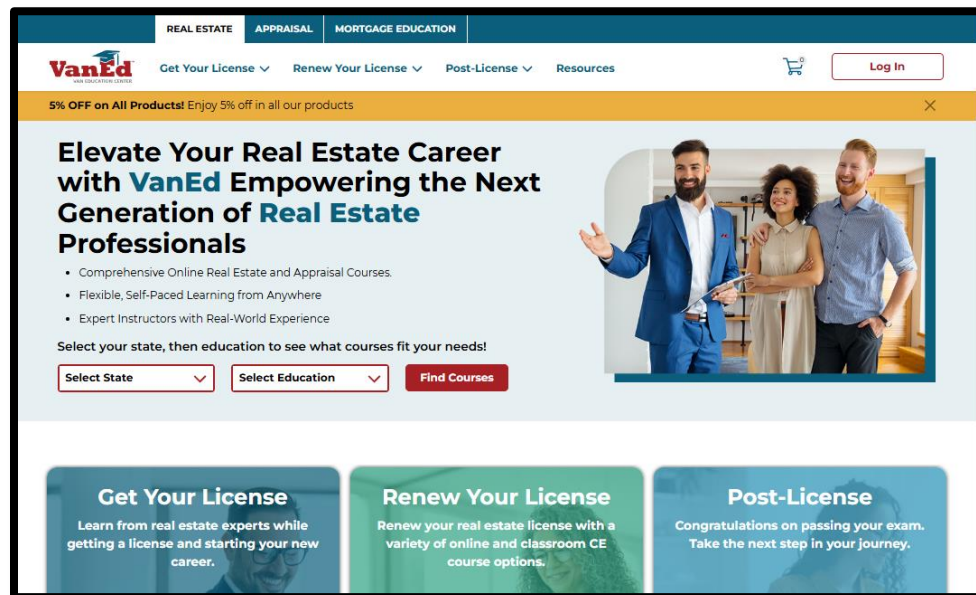
This document will guide you through the features and benefits available with FULL MANAGER ACCESS.

- **Manage User**
- **Add User: Batch Import**
- **Manage Organization Group**
- **Manage User Groups**
- **Plan & Enroll**
- **Reports**
- **Manage Security Roles**
- **Assign Security Roles**
- **Manage Enrollments**

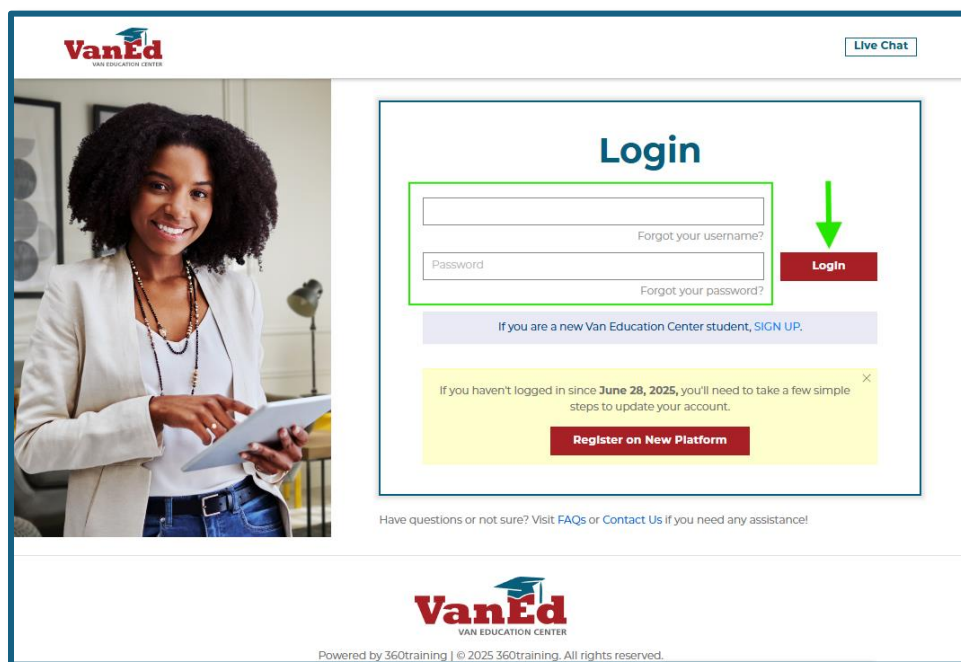
STEP 1

LOGIN

Go to www.vaned.com and click LOGIN.



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

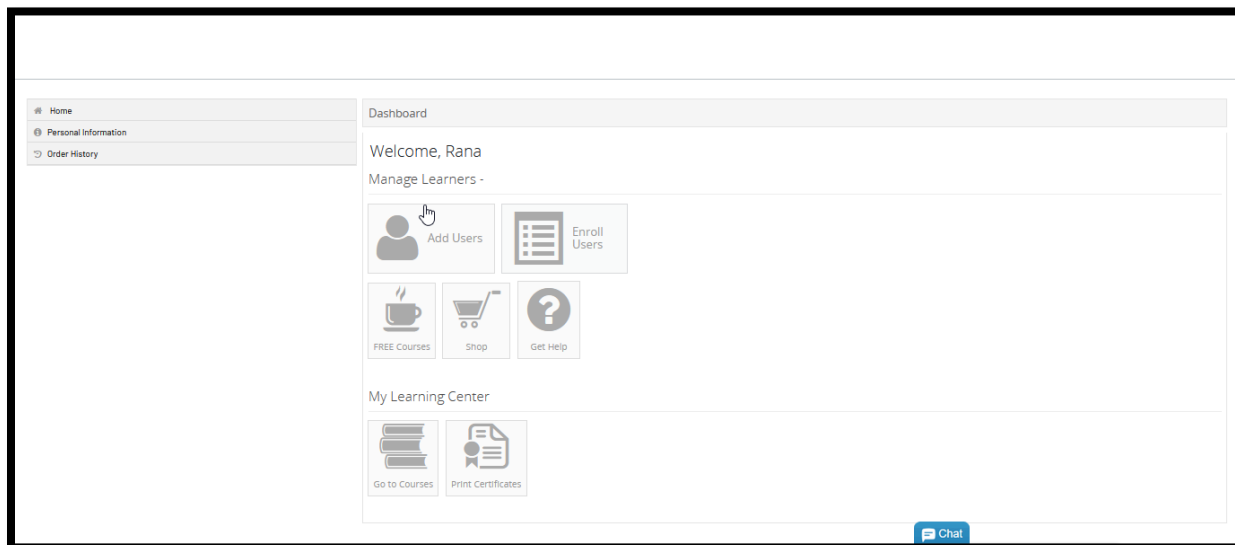


The image shows the VanEd login page. On the left is a photo of a smiling woman with curly hair holding a tablet. On the right is a login form titled "Login". The form has two input fields: "Email Address" and "Password". Below the "Email Address" field is a link "Forgot your username?". Below the "Password" field is a link "Forgot your password?". To the right of the "Password" field is a red "Login" button, with a green arrow pointing down to it. Below the login fields is a link "If you are a new Van Education Center student, SIGN UP.". Below that is a yellow box with a message: "If you haven't logged in since June 28, 2025, you'll need to take a few simple steps to update your account." and a red button "Register on New Platform". At the bottom of the page is the VanEd logo and the text "Powered by 360training | © 2025 360training. All rights reserved.".

STEP 2

VIEW YOUR DASHBOARD (Desktop View)

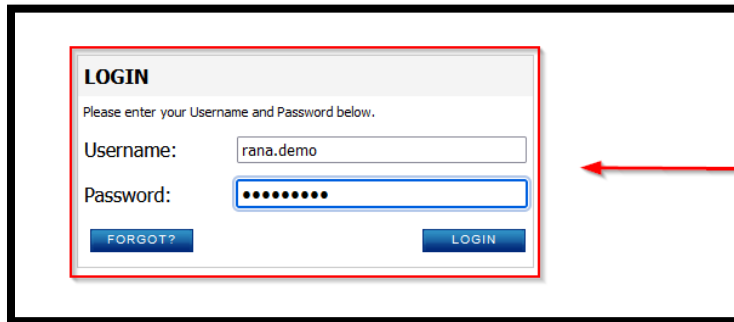
Once you have logged in with your credentials, you will see your dashboard. Once you select ADD USERS or ENROLL USERS, you will be taken to the manager view of the training platform to access reports, change user profile details, and print or download user completion cards and certificates.



The image shows the VanEd dashboard. On the left is a sidebar with links: "Home", "Personal Information", and "Order History". The main content area is titled "Dashboard" and says "Welcome, Rana". Below that is "Manage Learners -". There are two buttons: "Add Users" (with a person icon) and "Enroll Users" (with a list icon). Below these are three more buttons: "FREE Courses" (with a coffee cup icon), "Shop" (with a shopping cart icon), and "Get Help" (with a question mark icon). At the bottom is "My Learning Center" with two buttons: "Go to Courses" (with a book icon) and "Print Certificates" (with a certificate icon). At the bottom right is a "Chat" button.

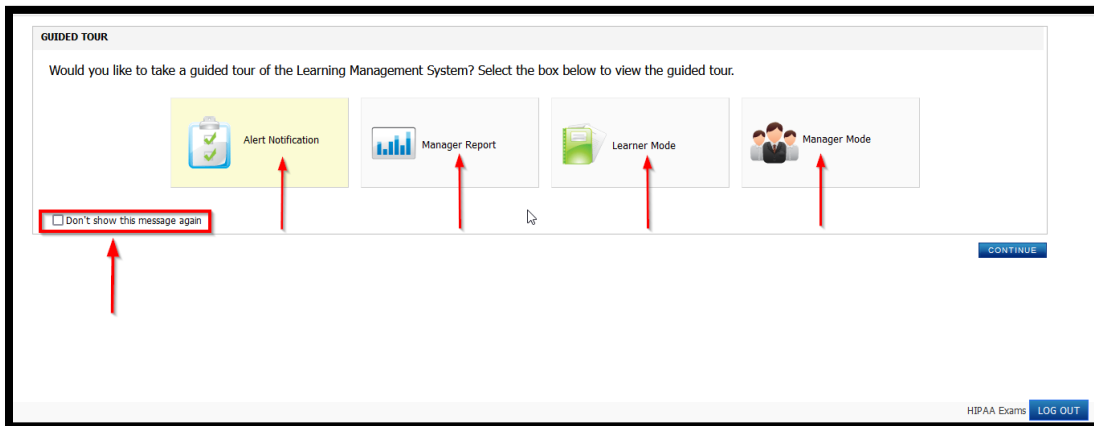
OR

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



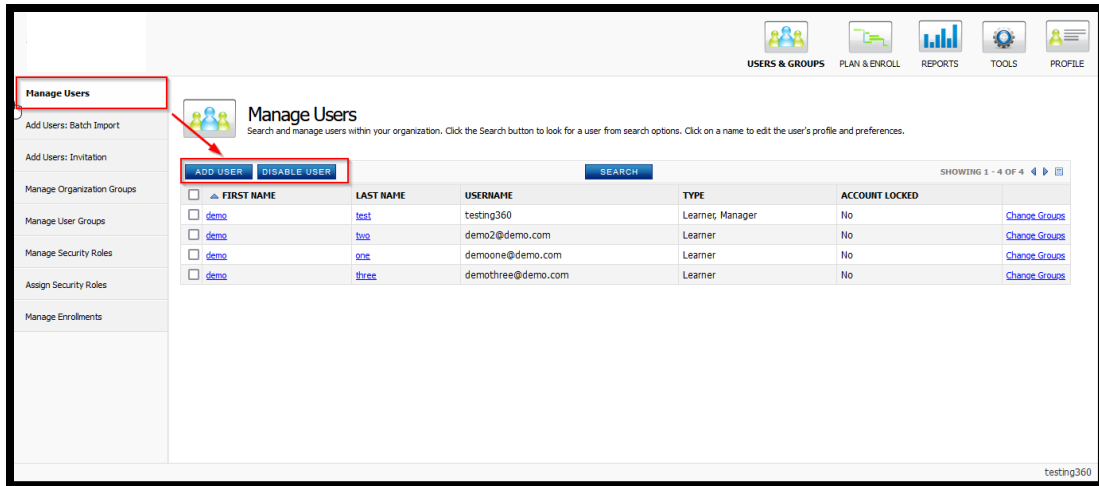
STEP 3 GUIDED TOUR

You may choose to step through tutorials or click CONTINUE.

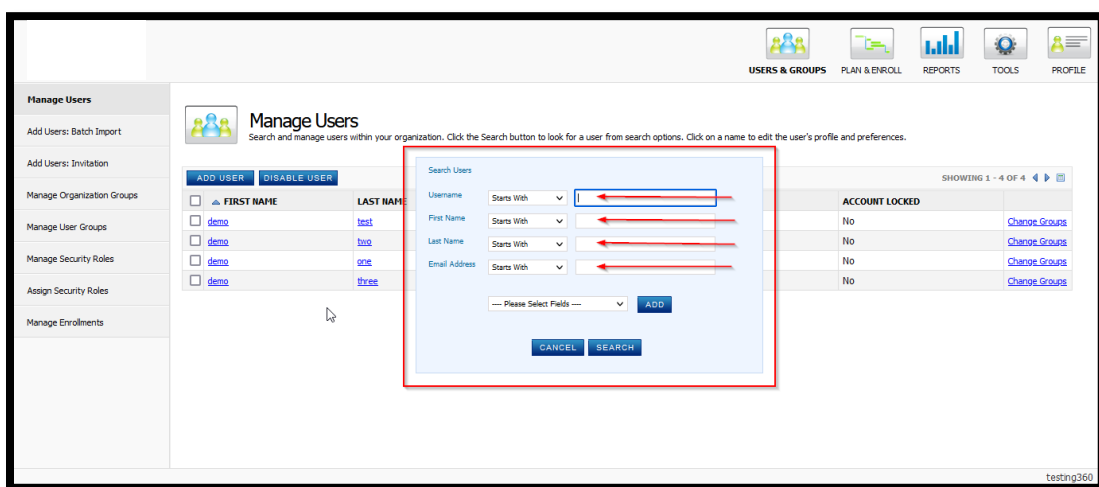
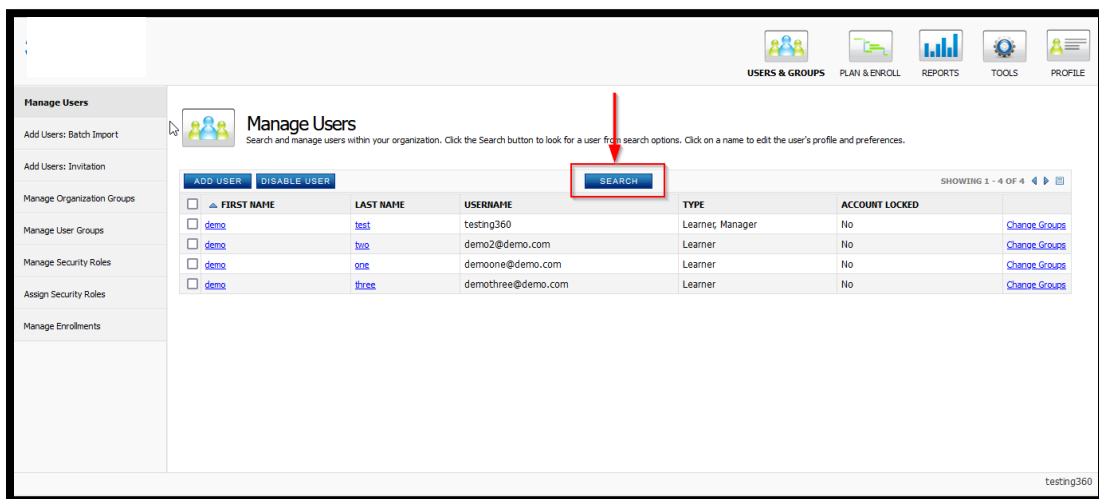


STEP 4 MANAGE USERS

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:

Search Users

Username Starts With

First Name Starts With

Last Name Starts With

Email Address Starts With

--- Please Select Fields ---

- Username
- First Name
- Last Name
- User Expiration Date
- Last Login Date
- Last Course Access Date
- Last Course Completion Date
- Last Enrollment Date
- User Status

ADD

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

Manage Users

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.

ADD USER DISABLE USER SEARCH

SHOWING 1 - 4 OF 4

<input type="checkbox"/>	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED	
<input type="checkbox"/>	demo	test	testing360	Learner, Manager	No	Change Groups
<input type="checkbox"/>	demo	two	demo2@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	one	demoone@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	three	demothree@demo.com	Learner	No	Change Groups

This opens the user profile page.

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

Manage User - Information
Edit a registered user's profile information and account access settings. Click Login as User to perform actions on behalf of the user.

LOGIN AS LEARNER **CHANGE GROUP** **CHANGE PREFERENCES**

First Name ☒ demo
Middle Name
Last Name ☒ test
Phone
Ext.
Address 1
City
State
Zip Code
Country

E-Mail Address ☒ test@testdemo.com
Mobile Phone
Address 2
City
State
Zip Code
Country

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.

Manage User - Information
Edit a registered user's profile information and account access settings. Click Login as User to perform actions on behalf of the user.

LOGIN AS LEARNER **CHANGE GROUP** **CHANGE PREFERENCES**

Zip Code
Country

LOGIN INFORMATION & ACCOUNT SETTINGS

User Name: ☒ testing360
Passwords:
Confirm Password:
Password should be at least 8 characters long and include 3 of the following: uppercase, lowercase, numerals, and symbols.

Account Locked: ☐ Yes ☒ No
Account Expired: ☐ Yes ☒ No
Account Disabled: ☐ Yes ☒ No
Visible On Reports: ☐ Yes ☒ No
Change Password On Next Login: ☐ Yes ☒ No
Expiration Date:

Custom Fields:
Reporting Fields:

CANCEL **UPDATE**

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

Manage User - Information
 Edit a registered user's profile information and account access settings. Click Login as User to perform actions on behalf of the user.

LOGIN AS LEARNER **CHANGE GROUP** **CHANGE PREFERENCES**

First Name	✓ demo	E-Mail Address	✓ test@testdemo.com
Middle Name	Provide Middle Name	Mobile Phone	(512) 539-1578
Last Name	✓ test	Address 2	New street
Phone	Provide Office Phone		same
Ext.	Provide Office Extension	City	texas
Address 1	New street	State	Texas
	same	Zip Code	74123
City	texas	Country	United States
State	Texas		
Zip Code	74123		
Country	United States		

LOGIN INFORMATION & ACCOUNT SETTINGS

User Name: ✓ test@360

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**.

Welcome back, demo test

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 options provide a filtered view of courses.

Show: **Enrolled Courses**

Corporate Custom	Continuing Education Units	Course Status
LearnService: TABC Seller-Server Training		
Last Accessed: Not Accessed More Details	Expires On Friday, March 31, 2023	Not Started

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.

Welcome back, demo test

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 options provide a filtered view of courses.

Show: **Recently Accessed Courses**

Recently Accessed Courses	Continuing Education Units	Course Status
COVID-19 Awareness	Expired On Tuesday, November 2, 2021	
Last Accessed: Nov 5, 2020 3:00:08 AM More Details Device Details		

demo test **SWITCH BACK** LOG OUT

STEP 5

USER BATCH IMPORT

Use the batch import tool to create or update user accounts in bulk.

Click the SAMPLE FILE link at the bottom of the page to open the CSV template in a spreadsheet or database program, then fill in the users you wish to import. Duplicates will be detected if the user has the same username.

Add Users: Batch Import
Use the batch import tool to create or update user accounts. Click on the Sample File link below to open a CSV template. Open the template in a spreadsheet or database program and fill in the users you wish to import. Duplicates will be detected if the user has the same email address.

IMPORT SETTINGS

Import File **BROWSE**
Note: Maximum 10000 records can be uploaded

File Delimiter: comma(,)

Account Locked: ☐ Yes ☒ No
Accounts Visible in Reports: ☒ Yes ☐ No
Duplicate Records: ☐ Ignore ☒ Update
Send Email Registration: ☐ Yes ☒ No
Change Password on Next Login: ☐ Yes ☒ No

Sample File: [Click here for a sample import file](#)

Password should be at least 8 characters long and include 3 of the following: uppercase, lowercase, numerals, and symbols.

IMPORT

Sample Import file view

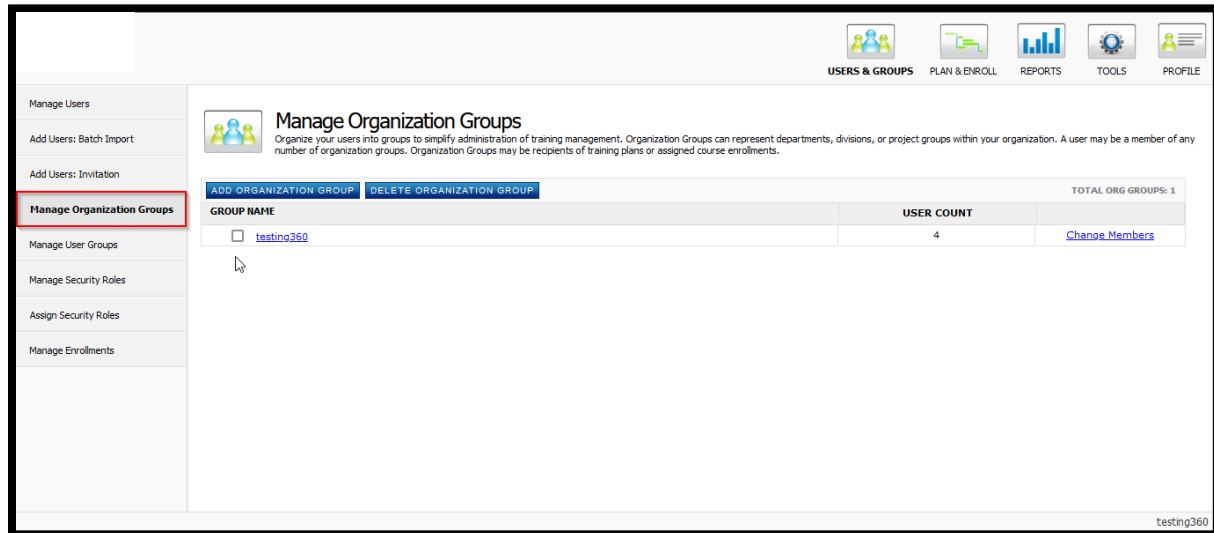
1	First Name	Middle Name	Last Name	Office Phone	Office Phone	Home Address	Home Address	City	State	Zip	Country	Email Address	Password	User Group	Organization	User Name
2	Joe		Learner						TX		United States	joe.learner@company.com	Learning1#			Company: joe.learner@company.com
3																
4																
5																
6																
7																
8																
9																
10																
11																
12																
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22																
23																

NOTE: If you need help with the batch import option, please contact support@360training.com.

STEP 6

MANAGE ORGANIZATION GROUP

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



Manage Organization Groups

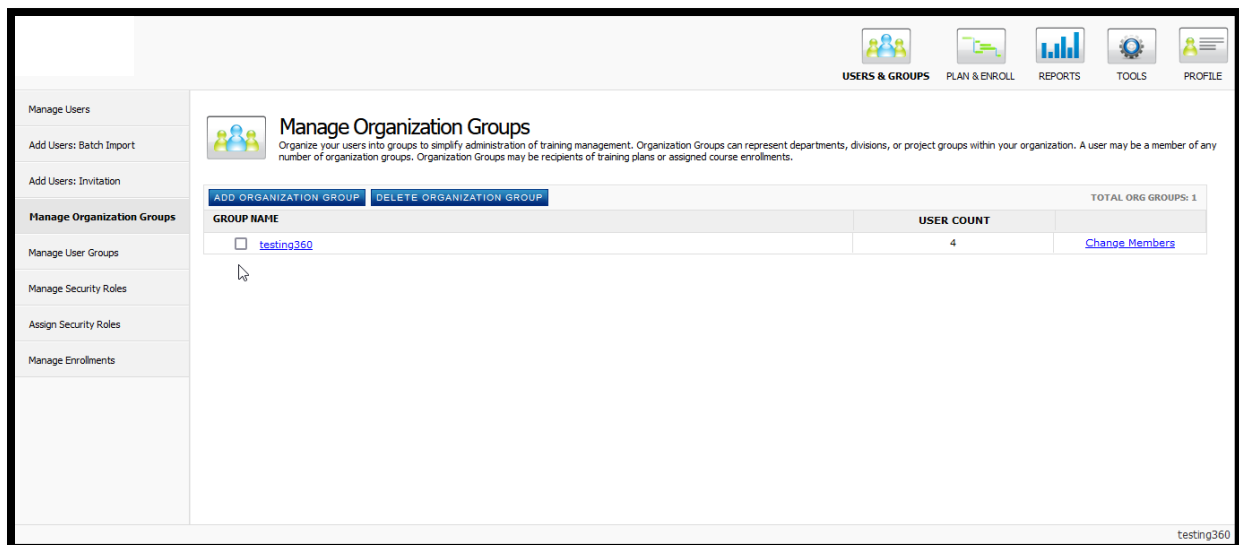
Organize your users into groups to simplify administration of training management. Organization Groups can represent departments, divisions, or project groups within your organization. A user may be a member of any number of organization groups. Organization Groups may be recipients of training plans or assigned course enrollments.

[ADD ORGANIZATION GROUP](#) [DELETE ORGANIZATION GROUP](#) TOTAL ORG GROUPS: 1

GROUP NAME	USER COUNT	
<input type="checkbox"/> testing360	4	Change Members

testing360

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



Manage Organization Groups

Organize your users into groups to simplify administration of training management. Organization Groups can represent departments, divisions, or project groups within your organization. A user may be a member of any number of organization groups. Organization Groups may be recipients of training plans or assigned course enrollments.

[ADD ORGANIZATION GROUP](#) [DELETE ORGANIZATION GROUP](#) TOTAL ORG GROUPS: 1

GROUP NAME	USER COUNT	
<input type="checkbox"/> testing360	4	Change Members

testing360

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

Manage Organization Groups

Organize your users into groups to simplify administration of training management. Organization Groups can represent departments, divisions, or project groups within your organization. A user may be a member of any number of organization groups. Organization Groups may be recipients of training plans or assigned course enrollments.

ADD ORGANIZATION GROUP DELETE ORGANIZATION GROUP

GROUP NAME	USER COUNT	TOTAL ORG GROUPS: 1
<input type="checkbox"/> testing360	4	Change Members

testing360

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

Manage Organization Group Members

Use the Add Member and Delete Member buttons to manage the member users of the Organization Group.

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ADD MEMBER DELETE MEMBER

	FIRST NAME	LAST NAME	USER NAME	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	No
<input type="checkbox"/>	demo	one	demoone@demo.com	No
<input type="checkbox"/>	demo	three	demothree@demo.com	No
<input type="checkbox"/>	demo	two	demo2@demo.com	No

BACK TO ORG GROUP

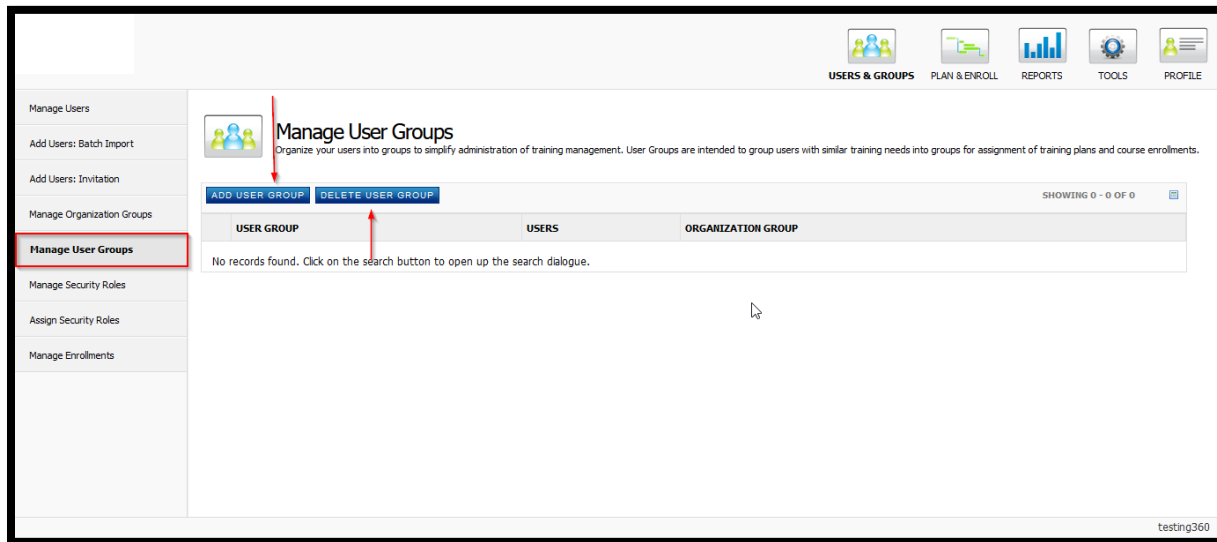
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STEP 7

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.

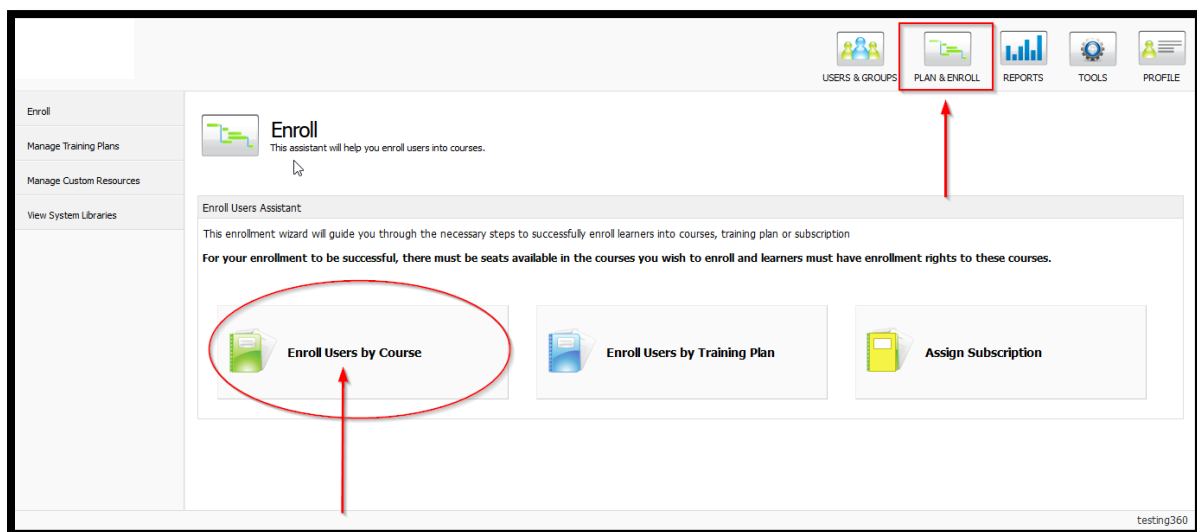
There are two options available: ADD USER GROUP or DELETE USER GROUP.



STEP 8

PLAN & ENROLL

Select ENROLL USERS BY COURSE



Then select USERS.

The screenshot shows the 'Enroll Learners' wizard, step 1 of 6. The title is 'Enroll Learners' with a subtitle 'This wizard will walk you through the steps to enroll learner(s) into courses. Choose the method you wish to use to find the recipient learners.' The 'SELECT ENROLLMENT METHOD' section has the heading 'Assign Enrollment to Learners by Searching:' and three radio button options: 'Users' (selected and highlighted with a red box and arrow), 'Organization Group', and 'User Groups'. At the bottom are 'CANCEL' and 'NEXT' buttons. A sidebar on the left shows the wizard steps, with '1. Select Enrollment Method' highlighted. The bottom right corner has the text 'testing360'.

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

The screenshot shows the 'Assign Enrollment - Select Learners' wizard, step 2 of 6. The title is 'Assign Enrollment - Select Learners' with a subtitle 'Search for learners to enroll into course(s)'. A search modal is open, titled 'Search Learners', with fields for 'First Name', 'Last Name', and 'Email Address', and 'CANCEL' and 'SEARCH' buttons. The modal is highlighted with a red box. The background shows a table with a 'FIRST NAME' column and a 'SEARCH' button. At the bottom are 'CANCEL', 'PREVIOUS', and 'NEXT' buttons. A sidebar on the left shows the wizard steps, with '2. Select Learners or Groups' highlighted. The bottom right corner has the text 'testing360'.

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 Enrollments Wizard
Showing 2 of 6

- 1. Select Enrollment Method
- 2. Select Learners or Groups**
- 3. Select Courses
- 4. Select Enrollment dates
- 5. Configure Enrollment Settings
- 6. View Results

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	demothree@demo.com	No

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

Assign Enrollments Wizard
Showing 3 of 6

- 1. Select Enrollment Method
- 2. Select Learners 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 Courses

Course Name

Contract Name

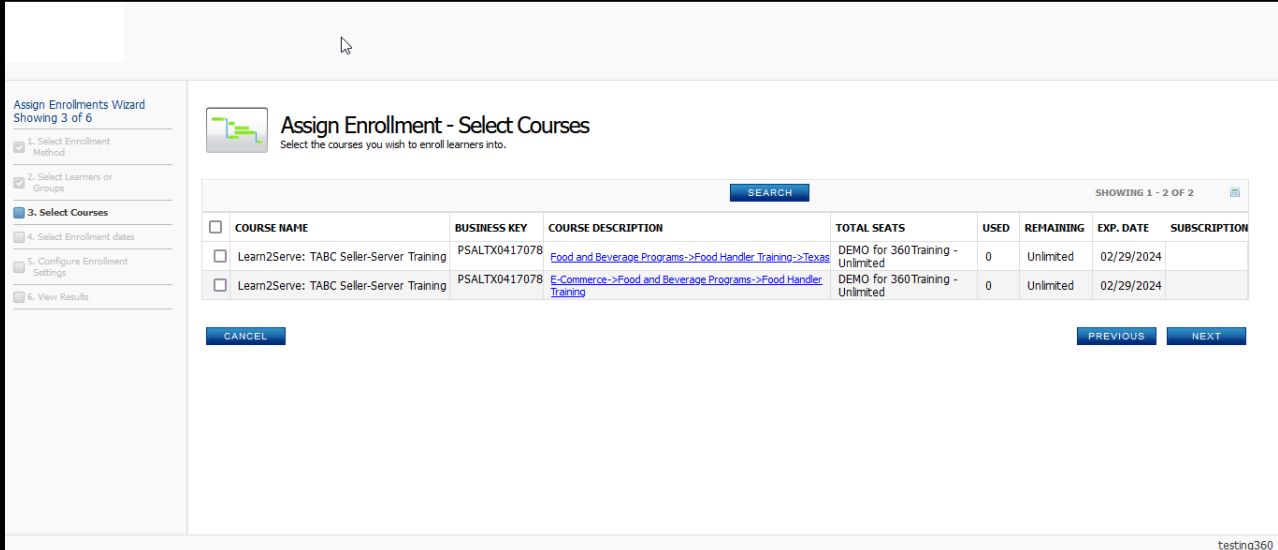
Business Key

Max Expiration Date

No records found. Click on the search button to search

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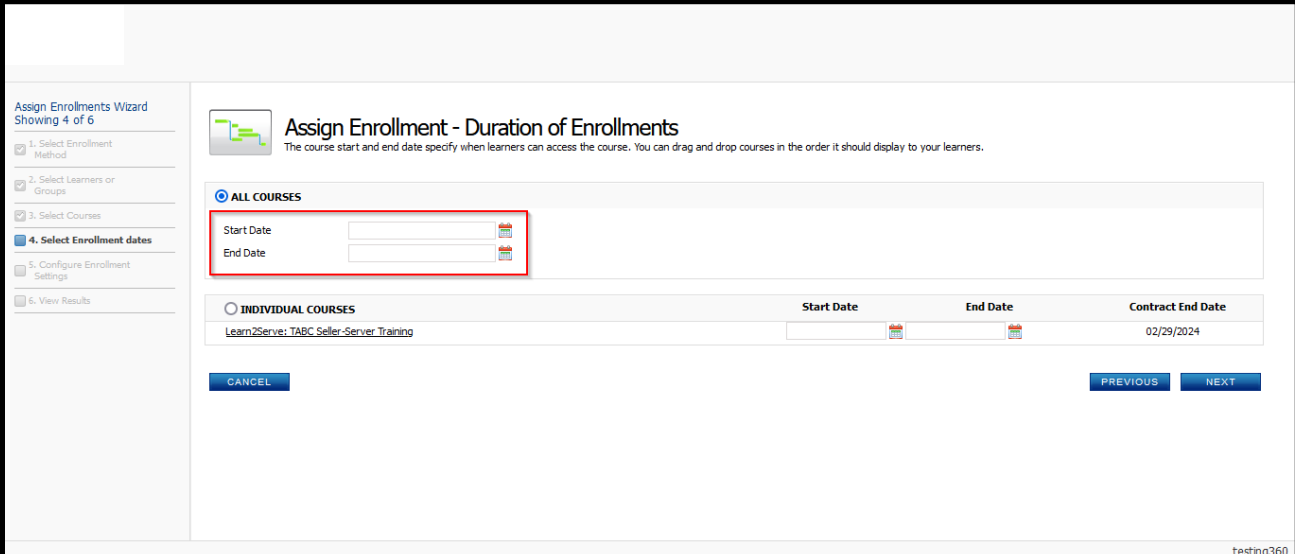
Select the desired course from the results.



The screenshot shows the 'Assign Enrollment - Select Courses' interface. On the left is a sidebar with the 'Assign Enrollments Wizard' showing 3 of 6 steps. Step 3, 'Select Courses', is active. The main area has a title 'Assign Enrollment - Select Courses' and a subtitle 'Select the courses you wish to enroll learners into.' Below this is a table with columns: COURSE NAME, BUSINESS KEY, COURSE DESCRIPTION, TOTAL SEATS, USED, REMAINING, EXP. DATE, and SUBSCRIPTION. Two rows are visible, both for 'Learn2Serve: TABC Seller-Server Training' with business key 'PSALTX0417078'. The first row's description is 'Food and Beverage Programs->Food Handler Training->Texas' and the second is 'E-Commerce->Food and Beverage Programs->Food Handler Training'. Both have 'DEMO for 360Training - Unlimited' seats, 0 used, and unlimited remaining. The expiration date is 02/29/2024. At the bottom are 'CANCEL', 'PREVIOUS', and 'NEXT' buttons. A 'SEARCH' button is at the top right of the table area. The text 'SHOWING 1 - 2 OF 2' is also present.

COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	TOTAL SEATS	USED	REMAINING	EXP. DATE	SUBSCRIPTION
<input type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALTX0417078	Food and Beverage Programs->Food Handler Training->Texas	DEMO for 360Training - Unlimited	0	Unlimited	02/29/2024	
<input type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALTX0417078	E-Commerce->Food and Beverage Programs->Food Handler Training	DEMO for 360Training - Unlimited	0	Unlimited	02/29/2024	

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.



The screenshot shows the 'Assign Enrollment - Duration of Enrollments' interface. The sidebar shows step 4, 'Select Enrollment dates', is active. The main area has a title 'Assign Enrollment - Duration of Enrollments' and a subtitle '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.' There are two radio buttons: 'ALL COURSES' (selected) and 'INDIVIDUAL COURSES'. Under 'ALL COURSES', there are 'Start Date' and 'End Date' input fields with calendar icons, highlighted by a red box. Under 'INDIVIDUAL COURSES', there is a table with columns 'Start Date', 'End Date', and 'Contract End Date'. One row is visible for 'Learn2Serve: TABC Seller-Server Training' with empty date fields and a 'Contract End Date' of 02/29/2024. At the bottom are 'CANCEL', 'PREVIOUS', and 'NEXT' buttons.

Start Date	End Date	Contract End Date
		02/29/2024

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 Enrollments Wizard
Showing 5 of 6

- 1. Select Enrollment Method
- 2. Select Learners or Groups
- 3. Select Courses
- 4. Select Schedule
- 5. Configure Enrollment Settings**
- 6. View Results

Assign Enrollment - Assignment Options

Select options for this course enrollment. Duplicate enrollments will be either updated to the new enrollment in this 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	<input type="radio"/> Yes	<input checked="" type="radio"/> No

CANCEL **PREVIOUS** **FINISH**

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

Assign Enrollments Wizard
Showing 6 of 6

- 1. Select Enrollment Method
- 2. Select Learners or Groups
- 3. Select Courses
- 4. Select Enrollment dates
- 5. Select Schedule
- 5. Configure Enrollment**

Assign Enrollment - Results

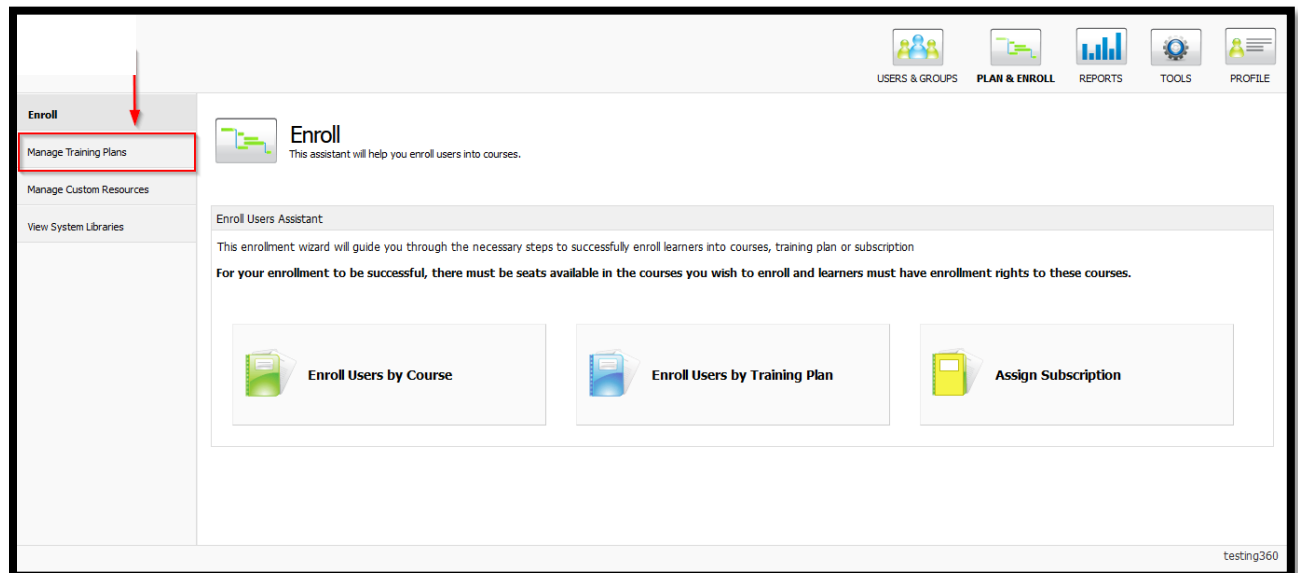
SUMMARY INFORMATION

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

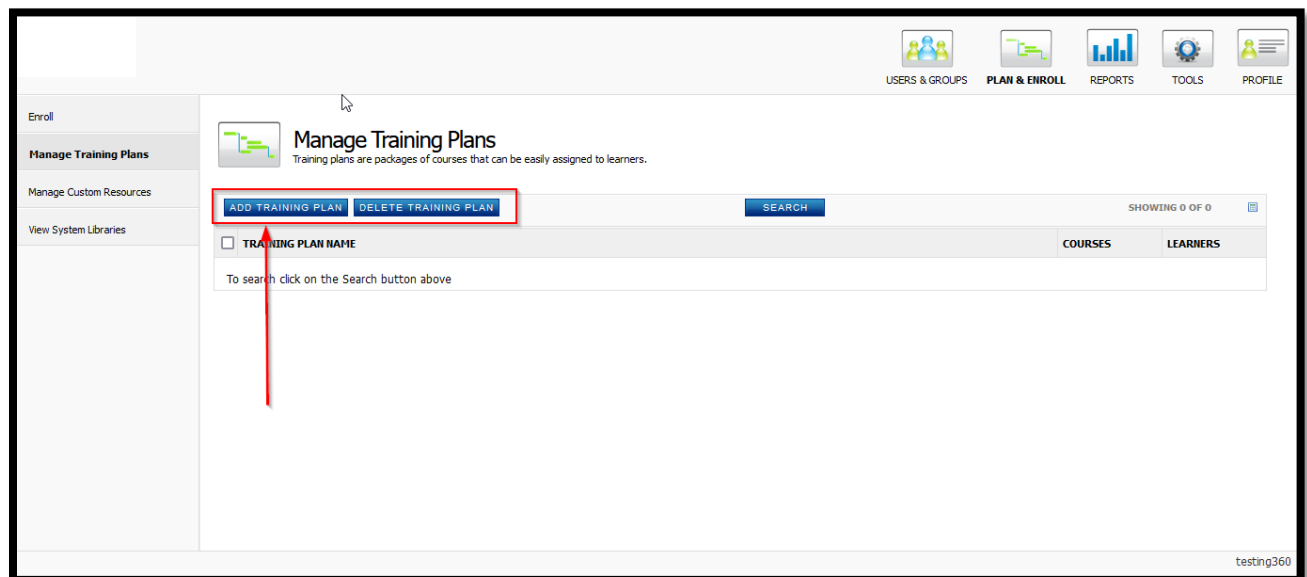
⚠ The enrollment process has been started. This may take 10-15 minutes to complete depending upon how many students you are enrolling. An email confirmation will be sent to your email address once the process has been completed.

OK

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.

Users & Groups | Plan & Enroll | Reports | Tools | Profile

Add New Training Plan Wizard
Showing 1 of 3

- 1. Training Plan Summary
- 2. Selected Courses
- 3. Confirmation

Add Training Plan

Fill out the basic information of the new training plan and click the Next button to proceed.

SUMMARY

Training Plan Name *

Description

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Click on the **“Search”** button and for search options by **Course Name**, **Contract Name**, **Business Key** and **Max Expiration Date**.

Users & Groups | Plan & Enroll | Reports | Tools | Profile

Add New Training Plan Wizard
Showing 2 of 3

- 1. Training Plan Summary
- 2. Selected Courses
- 3. Confirmation

Add Training Plan

Select Course(s) to add to Training Plan.

COURSES

☐ **COURSE NAME**

To search click on the Search button above

Search Courses

Course Name

Contract Name

Business Key

Max Expiration Date

SHOWING 0 - 0 OF 0

BUSINESS KEY	COURSE DESCRIPTION	EXPIRATION DATE	CONTRACT NAME
--------------	--------------------	-----------------	---------------

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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.

Add Training Plan
Select Course(s) to add to Training Plan.

COURSES SEARCH SHOWING 1 - 2 OF 2

<input checked="" type="checkbox"/>	COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	EXPIRATION DATE	CONTRACT NAME
<input checked="" type="checkbox"/>	Aprender a servir: Capacitación de TABC para vendedores/camareros	PSALT0513050	Food and Beverage Programs->Food Handler Training->Texas	02/29/2024	DEMO for 360Training
<input checked="" type="checkbox"/>	Learn2Serve: TABC Seller-Server Training	PSALT0417078	Food and Beverage Programs->Food Handler Training->Texas	02/29/2024	DEMO for 360Training

CANCEL PREVIOUS NEXT

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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.

Add Training Plan
Training Plan enrollment has been made. Below is a summary of the contracts used in the bulk enrollment process.

SUMMARY

Training Plan Name DEMO TRAINING

Description

DEMO TRAINING

COURSES

Course Names Aprender a servir: Capacitación de TABC para vendedores/camareros
Learn2Serve: TABC Seller-Server Training

CANCEL PREVIOUS FINISH

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.

TRAINING PLAN NAME	COURSES	LEARNERS
DEMO TRAINING	2	0

Select ENROLL USERS BY TRAINING PLAN

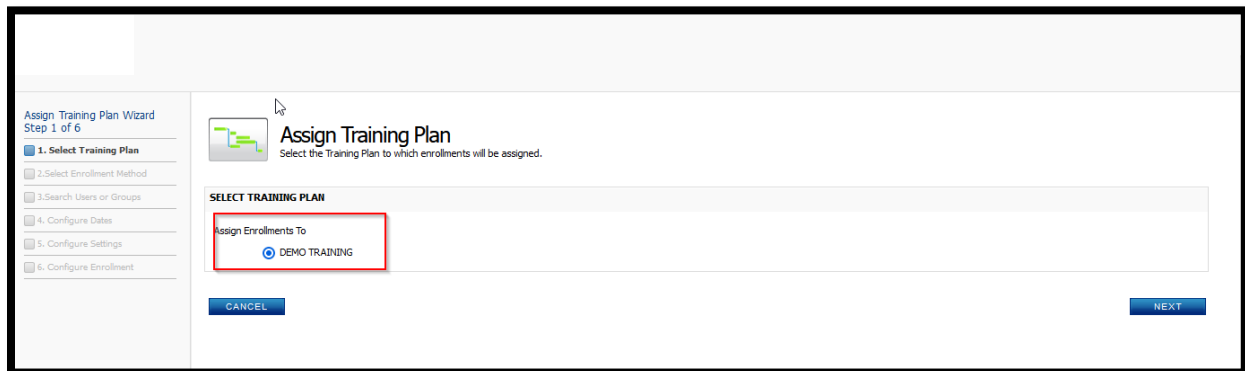
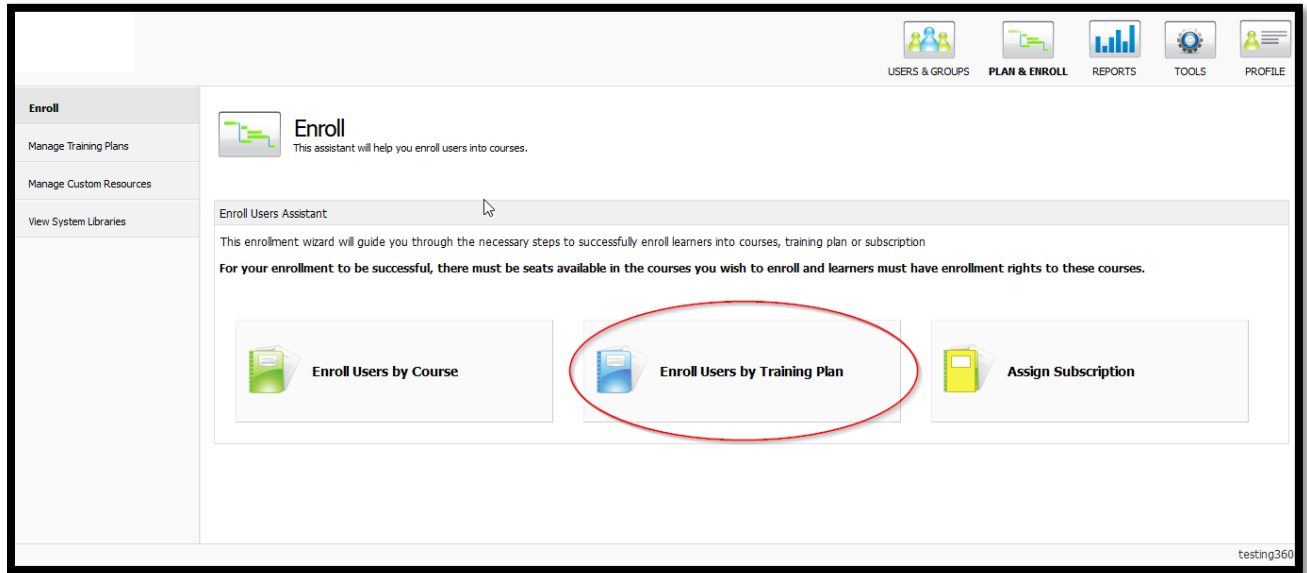
Enroll Users Assistant

This enrollment wizard will guide you through the necessary steps to successfully enroll learners into courses, training plan or subscription.

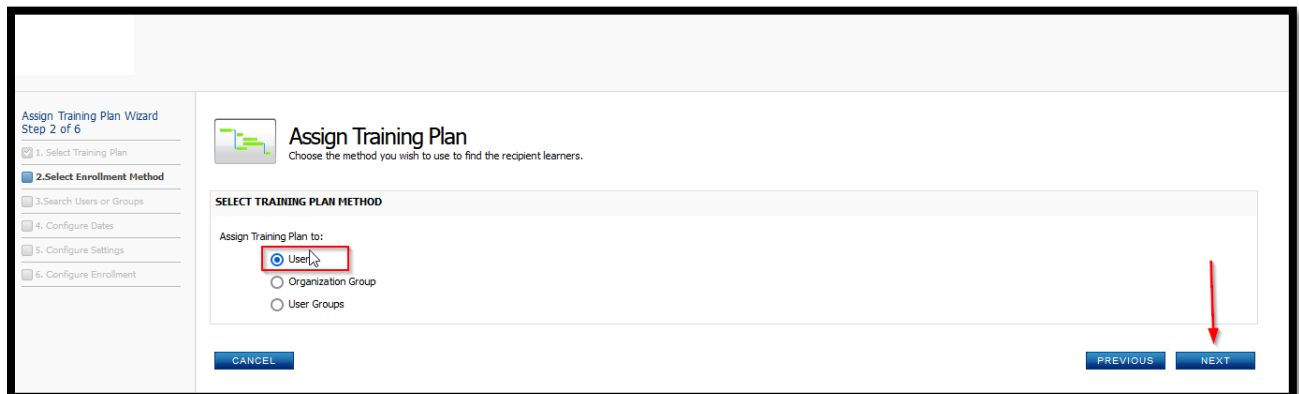
For your enrollment to be successful, there must be seats available in the courses you wish to enroll and learners must have enrollment rights to these courses.

Enroll Users by Course **Enroll Users by Training Plan** **Assign Subscription**

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. Select Enrollment Method
- 3. Search Users or Groups**
- 4. Configure Dates
- 5. Configure Settings
- 6. Configure Enrollments

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

SEARCH

SHOWING 1 - 1 OF 1

<input type="checkbox"/>	FIRST NAME	LAST NAME	USER NAME	SECURITY ROLE	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	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. Select Enrollment Method
- 3. Search Users or Groups
- 4. Configure Dates**
- 5. Configure Settings
- 6. Configure Enrollments

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 → 03/01/2023

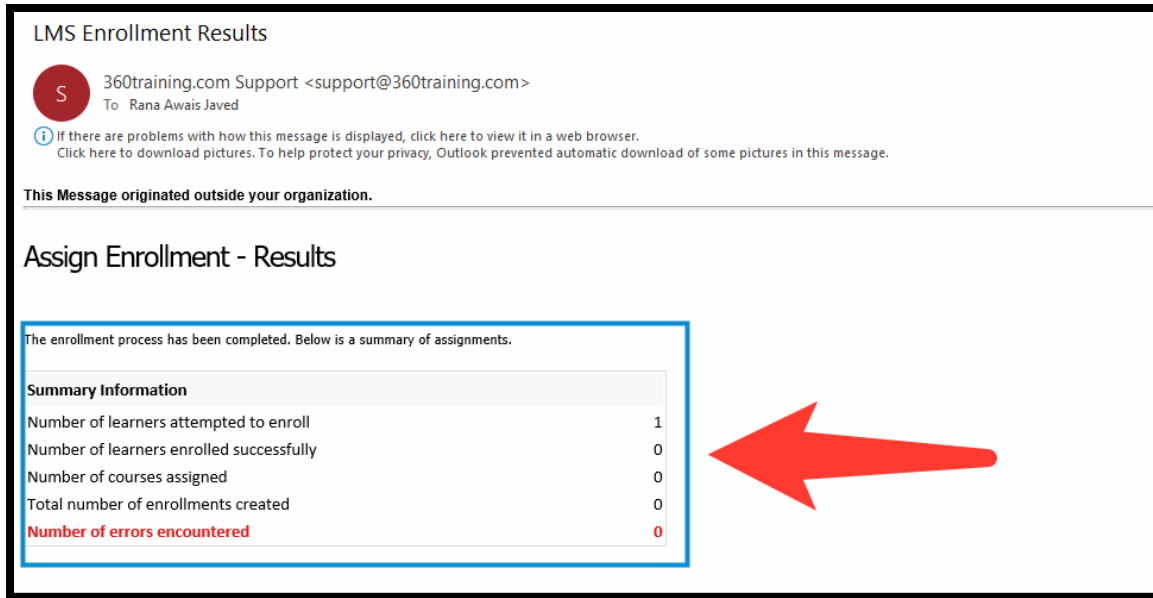
End Date → 03/15/2023

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

CANCEL PREVIOUS NEXT

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

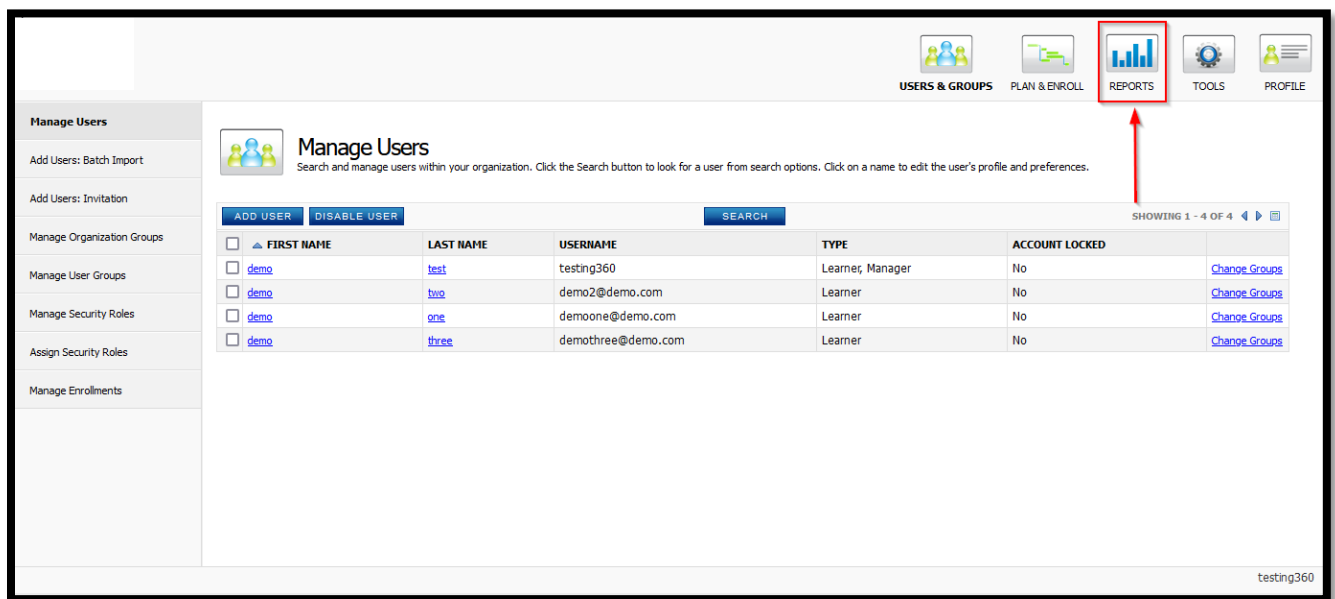
Email will be received as a confirmation of LMS Enrollment Results.




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.







USERS & GROUPS




PLAN & ENROLL



REPORTS



TOOLS



PROFILE

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 -

Keywords...

Filter Results

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

testing360

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.

Users & Groups | Plan & Enroll | **Reports** | Tools | Profile

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 - **Filter Results**

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 Summary (All Learners)	Registration	03/01/2023	View Results

testing360

To run the report, click on the report name.

Users & Groups | Plan & Enroll | **Reports** | Tools | Profile

Welcome to the Report Center

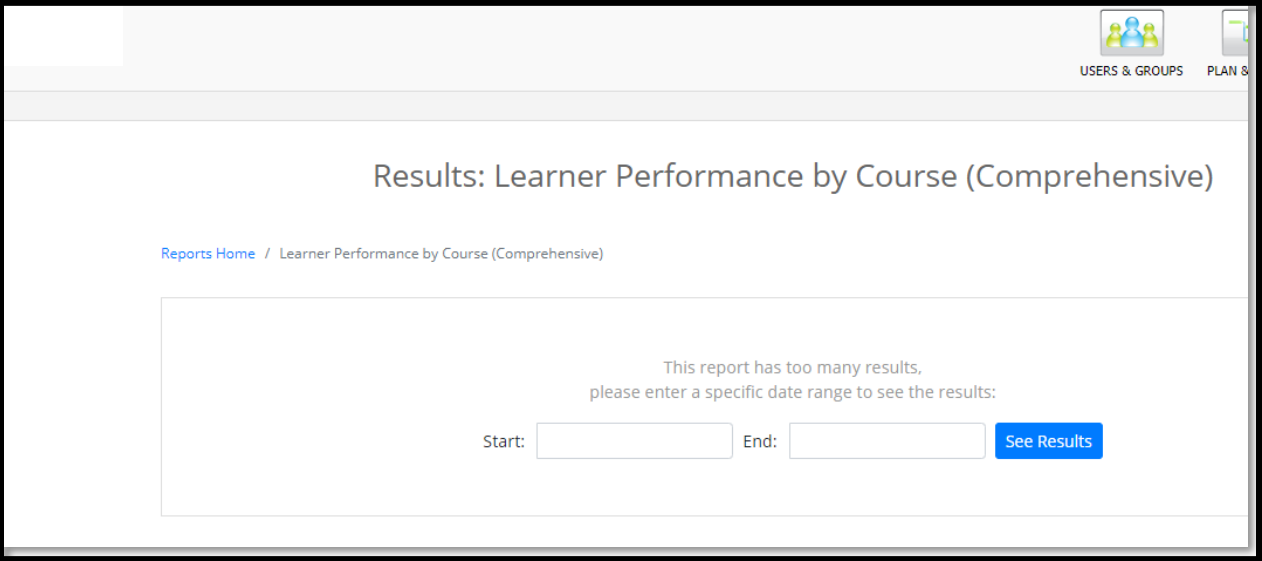
To view a report's results click on the Report Name. Use the filters on the top to narrow down your search or click a column title to sort.

Category: Performance **Filter Results**

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
Content Performance Summary (All Training Plans)	Performance	03/01/2023	View Results
Content Performance by Course	Performance	03/01/2023	View Results
Organization Group Performance by Course	Performance	03/01/2023	View Results

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.



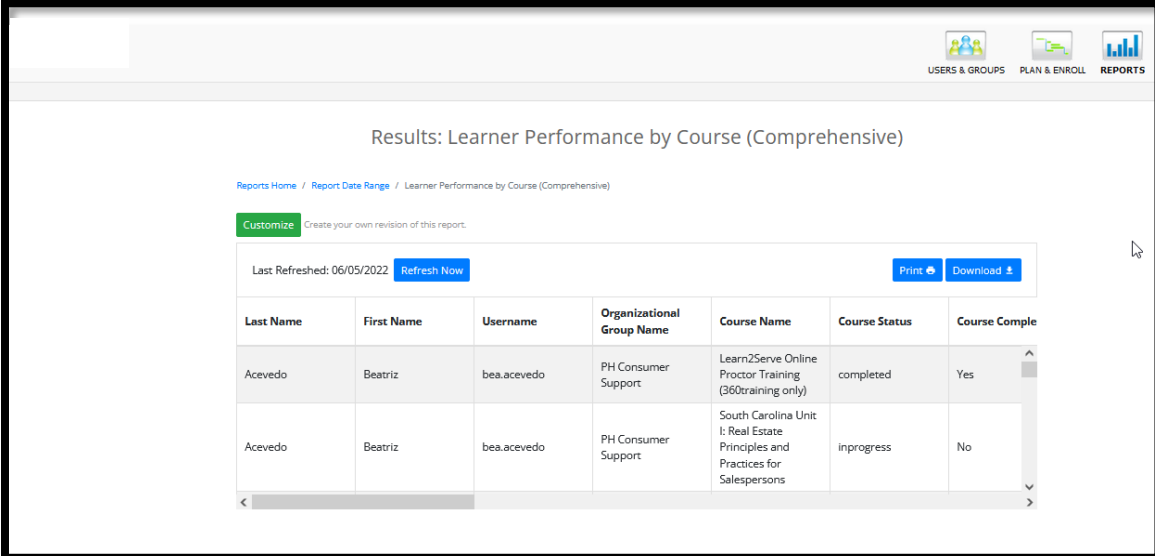
Results: Learner Performance by Course (Comprehensive)

[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 \(Comprehensive\)](#)

[Customize](#) Create your own revision of this report.

Last Refreshed: 06/05/2022 [Refresh Now](#) [Print](#) [Download](#)

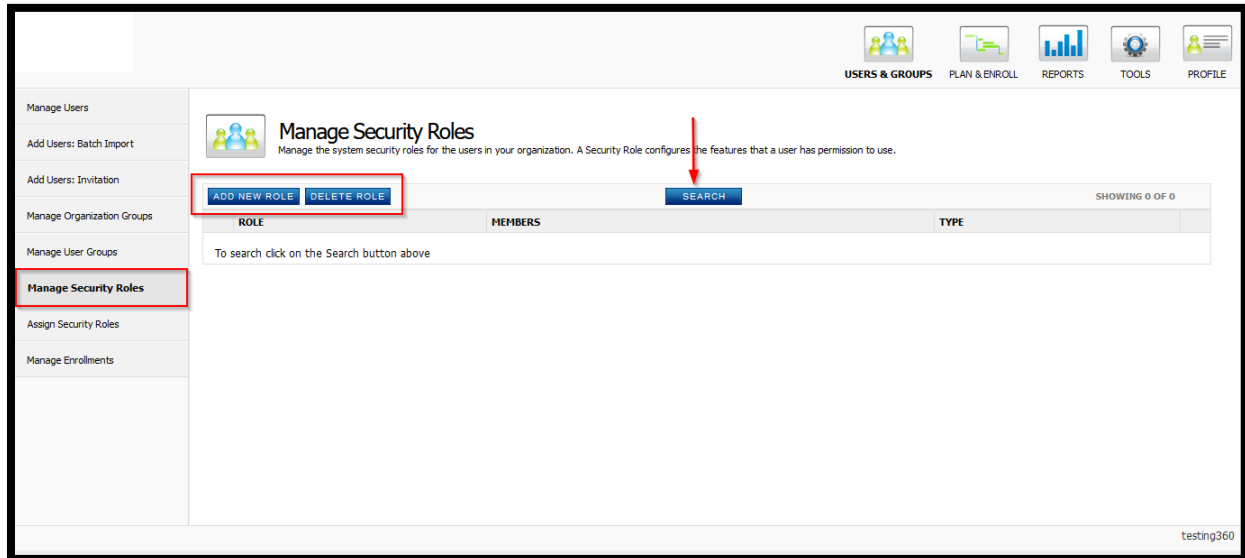
Last Name	First Name	Username	Organizational Group Name	Course Name	Course Status	Course Complete
Acevedo	Beatriz	bea.acevedo	PH Consumer Support	Learn2Serve Online Proctor Training (360training only)	completed	Yes
Acevedo	Beatriz	bea.acevedo	PH Consumer Support	South Carolina Unit I: Real Estate Principles and Practices for Salespersons	inprogress	No

STEP 10

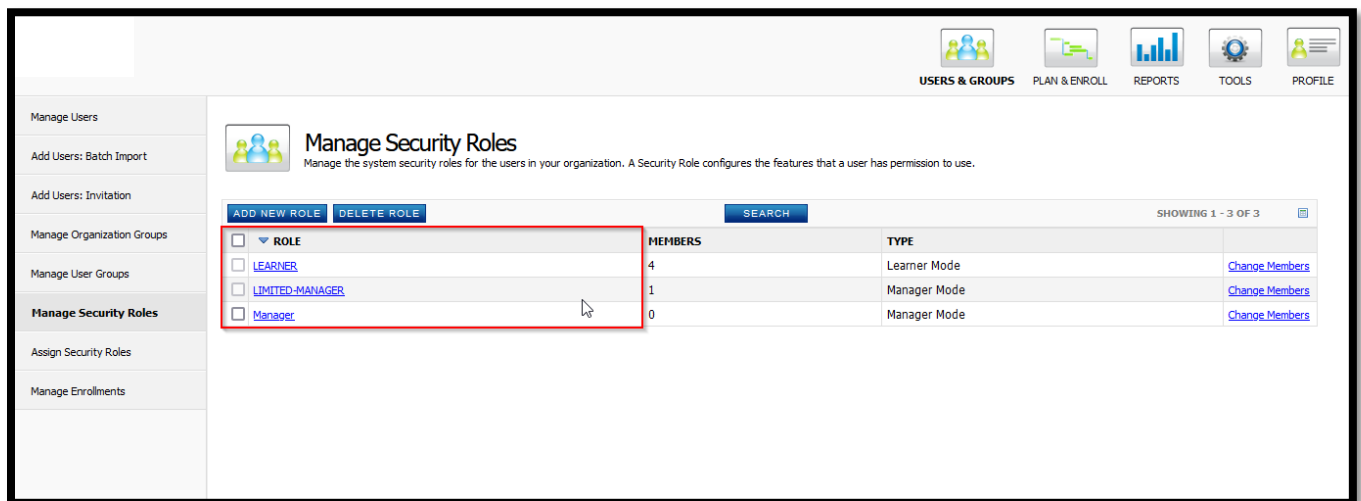
MANAGE SECURITY ROLES

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.

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.

ADD NEW ROLE DELETE ROLE SEARCH

ROLE	MEMBERS	TYPE	
LEARNER	4	Learner Mode	Change Members
LIMITED-MANAGER	1	Manager Mode	Change Members
Manager	0	Manager Mode	Change Members

SHOWING 1 - 3 OF 3

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.

Manager Permission

Manage Predict Account

Manage Predict Account ☐ Enabled ☒ Disabled

Users & Groups

Manage Users ☒ Enabled ☐ Disabled

Add Users: Batch Import ☒ Enabled ☐ Disabled

Add Users: Invitation ☒ Enabled ☐ Disabled

Manage Organizational Groups ☒ Enabled ☐ Disabled

Manage User Groups ☒ Enabled ☐ Disabled

Manage Security Profiles ☒ Enabled ☐ Disabled

Assign Security Roles ☒ Enabled ☐ Disabled

Manage Enrollments ☒ Enabled ☐ Disabled

Plan & Enroll

Enroll ☒ Enabled ☐ Disabled

Enforce Org. Group Enrollment Restriction ☐ Enabled ☒ Disabled

Manage Training Plans ☒ Enabled ☐ Disabled

Manage Custom Resources ☐ Enabled ☒ Disabled

View System Libraries ☒ Enabled ☐ Disabled

Enable Certificates ☒ Enabled ☐ Disabled

Email Manager completion certificates ☐ Enabled ☒ Disabled

Reports

Performance Reports ☒ Enabled ☐ Disabled

Utilization Reports ☒ Enabled ☐ Disabled

Registration Reports ☒ Enabled ☐ Disabled

Survey Reports ☐ Enabled ☒ Disabled

Customers' Learner Performance by Course ☐ Enabled ☒ Disabled

TIPS Report ☐ Enabled ☒ Disabled

Tools

Manage Alerts ☒ Enabled ☐ Disabled

Send Announcements ☒ Enabled ☐ Disabled

Assign Surveys ☒ Enabled ☐ Disabled

Manage Surveys ☒ Enabled ☐ Disabled

Profile

Profile ☒ Enabled ☐ Disabled

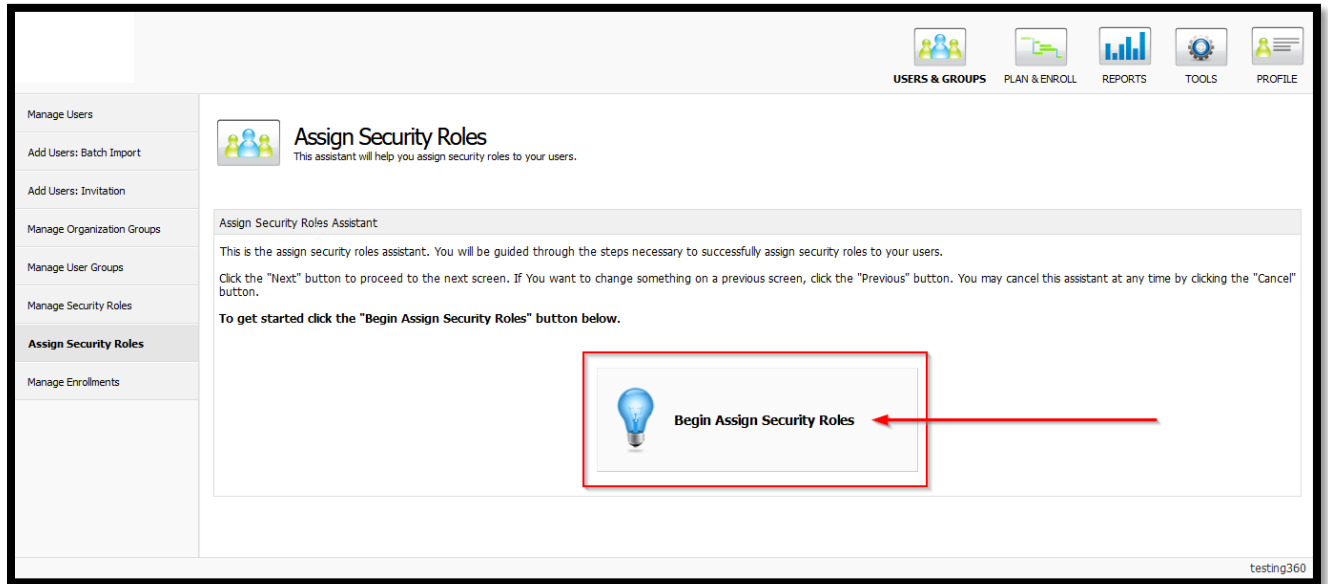
Preferences ☒ Enabled ☐ Disabled

STEP 11

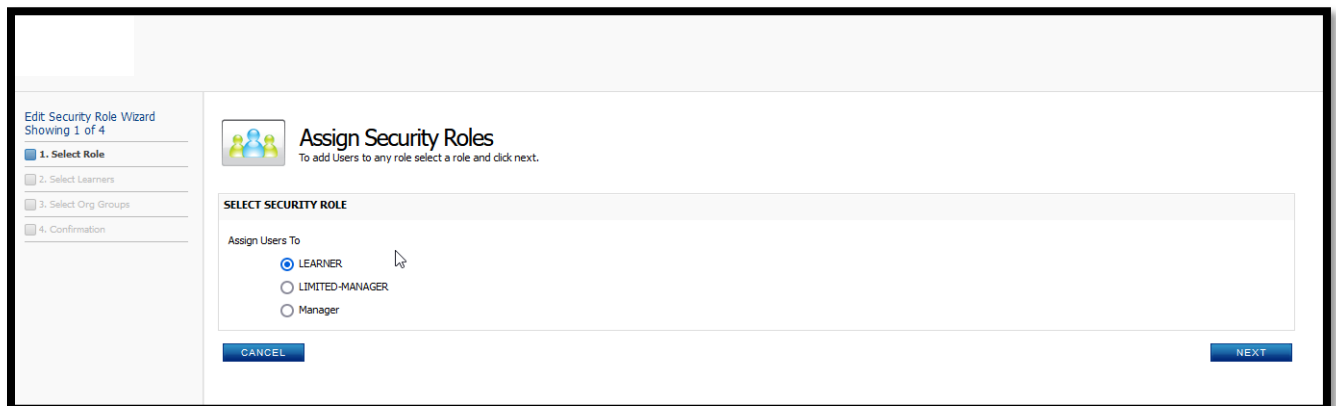
ASSIGN SECURITY ROLES

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.

Edit Security Role Wizard
Showing 2 of 4

- 1. Select Role
- 2. Select Learners**
- 3. Select Org Groups
- 4. Confirmation

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

SEARCH

SHOWING 4 OF 4

<input type="checkbox"/>	FIRST NAME	LAST NAME	USER NAME	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	No
<input type="checkbox"/>	demo	two	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 Wizard
showing 3 of 4

- 1. User Information
- 2. User Groups
- 3. Select Org Groups**
- 4. Confirmation

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

testing360

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.

The screenshot shows the 'Manage Enrollments' page. On the left is a sidebar with navigation links: Manage Users, Add Users: Batch Import, Add Users: Invitation, Manage Organization Groups, Manage User Groups, Manage Security Roles, Assign Security Roles, and **Manage Enrollments** (highlighted with a red box). The main content area has a header 'Manage Enrollments' with a sub-header '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.' Below this is a search modal with fields for 'First Name', 'Last Name', and 'Email Address', each with a red box around it. There are 'CANCEL' and 'SEARCH' buttons at the bottom of the modal, with a red arrow pointing to the 'SEARCH' button. In the background, a table with columns 'FIRST NAME', 'LAST NAME', 'USER NAME', and 'ENROLLMENTS' is visible, but it is empty, showing 'No records found. Click on the search button to open the search modal.' A red arrow points to the 'SEARCH' button in the top right corner of the main content area. The bottom right corner of the page shows 'testing360'.

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

Click VIEW ENROLLMENTS.

The screenshot shows the 'Manage Enrollments' page after a search. The search modal is closed, and a table of results is displayed. The table has columns: FIRST NAME, LAST NAME, USER NAME, and ENROLLMENTS. There are four rows of data. The first row has 'demo' for First Name, 'test' for Last Name, 'testing360' for User Name, and a link 'View Enrollments' for Enrollments. The second row has 'demo' for First Name, 'two' for Last Name, 'demo2@demo.com' for User Name, and a link 'View Enrollments' for Enrollments. The third row has 'demo' for First Name, 'one' for Last Name, 'demoone@demo.com' for User Name, and a link 'View Enrollments' for Enrollments. The fourth row has 'demo' for First Name, 'three' for Last Name, 'demothree@demo.com' for User Name, and a link 'View Enrollments' for Enrollments. A red arrow points to the 'View Enrollments' link in the first row. The top right corner of the page shows 'testing360'.

FIRST NAME	LAST NAME	USER NAME	ENROLLMENTS
demo	test	testing360	View Enrollments
demo	two	demo2@demo.com	View Enrollments
demo	one	demoone@demo.com	View Enrollments
demo	three	demothree@demo.com	View Enrollments

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)

COURSES	PROGRESS	STATUS	LOCK REASON	ENROLLMENT END DATE	CONTRACT END DATE
<input type="checkbox"/> COVID-19 Awareness	Expired	UnLocked	-	11/02/2021	11/02/2021

Profile

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

Customer Name	360 Vendor Demo	Website URL	Provide Website URL
First Name	Vendor	Email Address	admin@360vendor.com
Last Name	Admin	Account Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Phone	Provide Phone Number	Address 2	Provide Street Address
Ext.	Provide Extension		Provide Street Address
Address 1	Provide Street Address	City	Provide City
	Provide Street Address	State	Armed Forces Americas
City	Provide City	Zip Code	Provide Zip/Postal Code
State	Armed Forces Americas	Country	United States
Zip Code	Provide Zip/Postal Code		
Country	United States		

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 content area has a 'Manage Users' header with a search bar and a table of users. The table has columns for 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. The bottom right corner features a mode switcher with a red arrow pointing to it, showing 'Learner Mode', 'Manager Mode' (selected), and 'Manager Mode' with a dropdown arrow. A 'LOG OUT' button is also present.

<input type="checkbox"/>	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED
<input type="checkbox"/>	Admin	User	admin@360training.com	Learner	No
<input type="checkbox"/>	Alt Admin	Alt Admin	altadmin@360training.com	Learner	No
<input type="checkbox"/>	Brenda	Keating	brenda.keating@360training.com	Learner	No
<input type="checkbox"/>	Charles	Webster	charles.webster@360training.com	Learner	No
<input type="checkbox"/>	Clinton Kent	Clinton Kent	clinton.kent@360training.com	Learner	No
<input type="checkbox"/>	DANIEL D	LOTT	daniel.lott@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No
<input type="checkbox"/>	Demo	Account	demo@360training.com	Learner	No

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