



Hard Hat Training Platform

Manager-Level Access User Guide

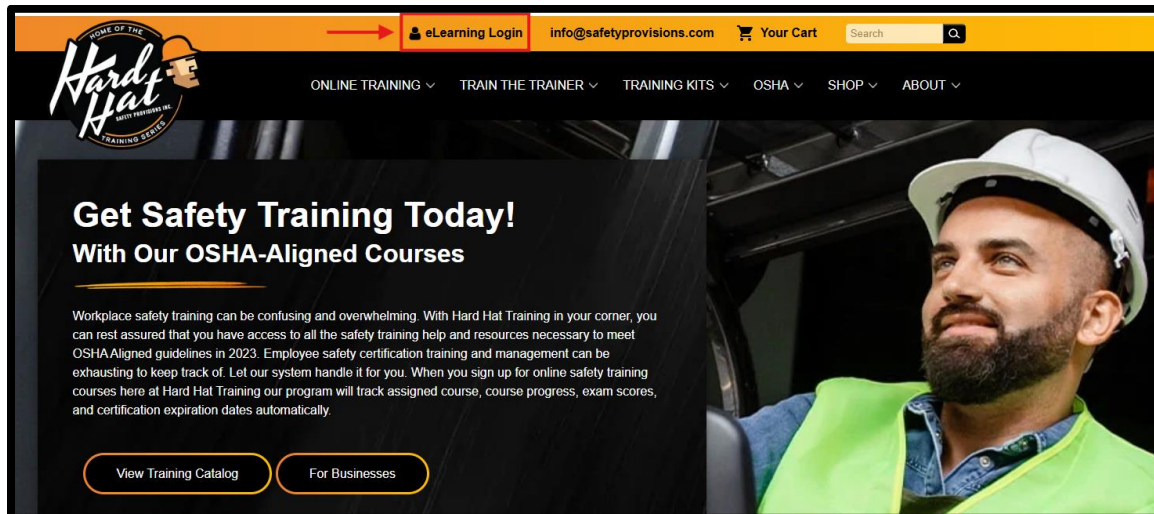
This document will guide you through the features and benefits available with FULL MANAGER ACCESS.

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

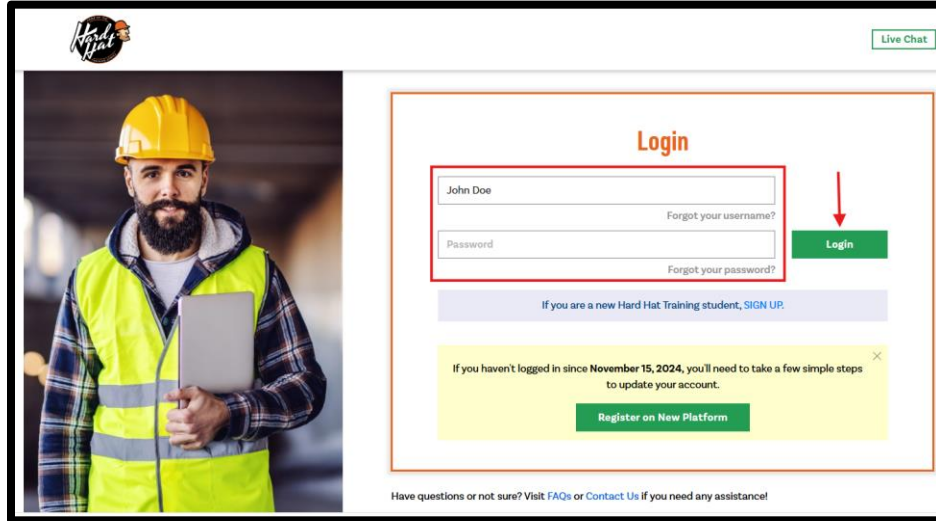
STEP 1

LOGIN

Go to hardhattraining.com and click LOGIN.



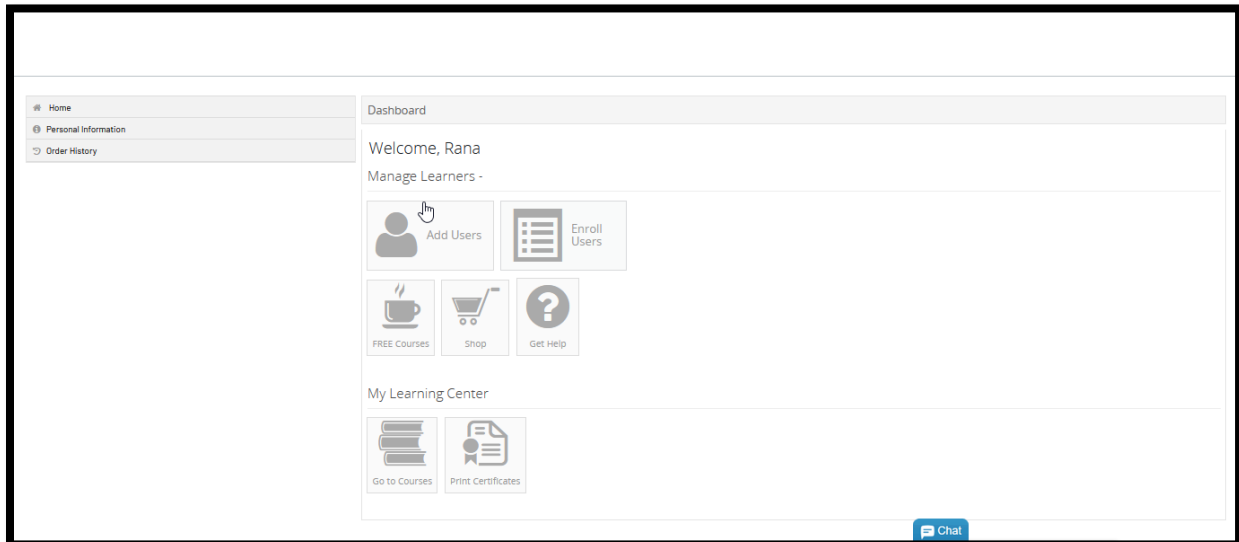
Enter your Email Address and Password, then click Login.



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.

LOGIN

Please enter your Username and Password below.

Username:

Password:

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

STEP 3 GUIDED TOUR

You may choose to step through tutorials or click CONTINUE.

GUIDED TOUR

Would you like to take a guided tour of the Learning Management System? Select the box below to view the guided tour.

Don't show this message again

[Alert Notification](#) [Manager Report](#) [Learner Mode](#) [Manager Mode](#)

[CONTINUE](#)

HIPAA Exams [LOG OUT](#)

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.

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.

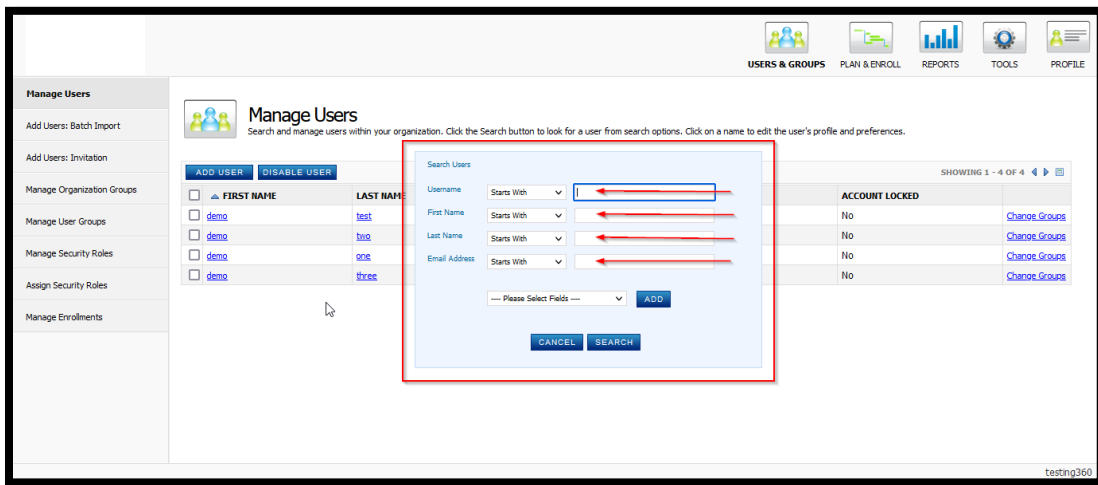
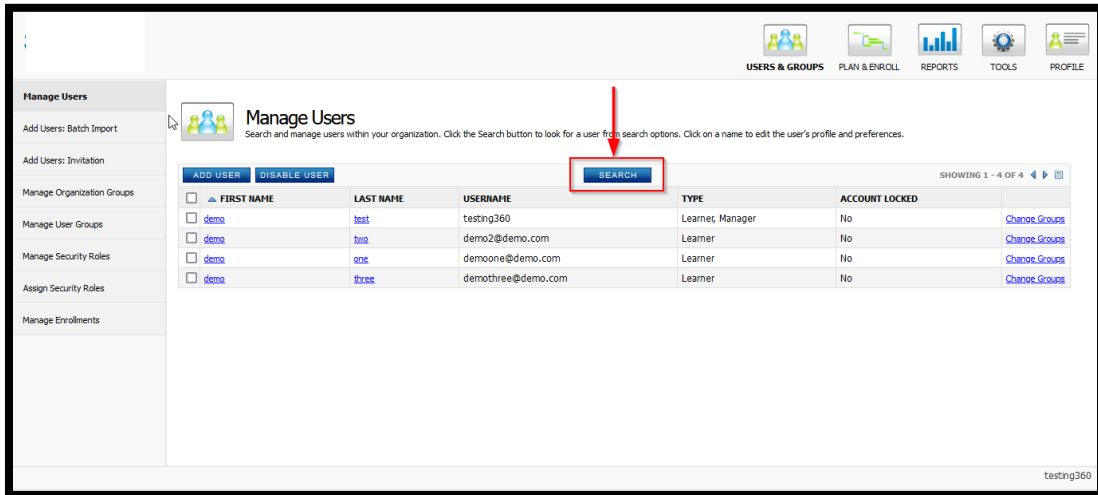
[ADD USER](#) [DISABLE USER](#) [SEARCH](#)

<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

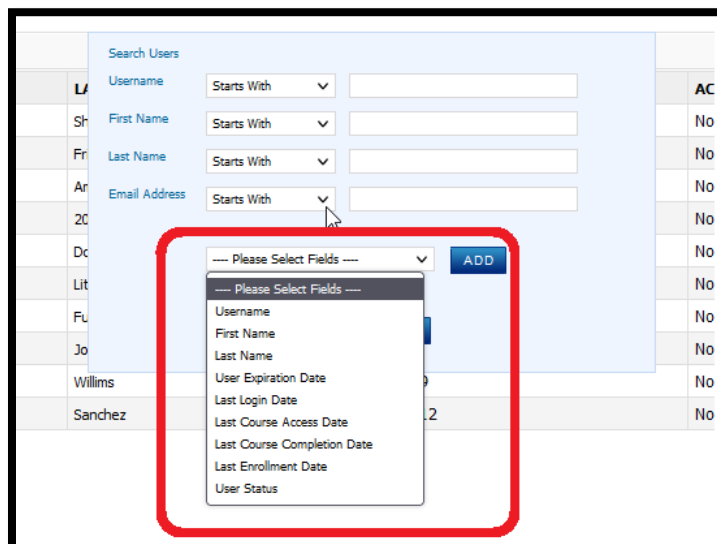
SHOWING 1 - 4 OF 4

testng360

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.



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

The screenshot shows the 'Manage Users' page with a table of users. The table has columns for 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. The first row has 'demo' in the 'FIRST NAME' column, 'test' in 'LAST NAME', 'testing360' in 'USERNAME', 'Learner, Manager' in 'TYPE', and 'No' in 'ACCOUNT LOCKED'. A red box highlights the 'demo' text, and a red arrow points to it from below.

<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.

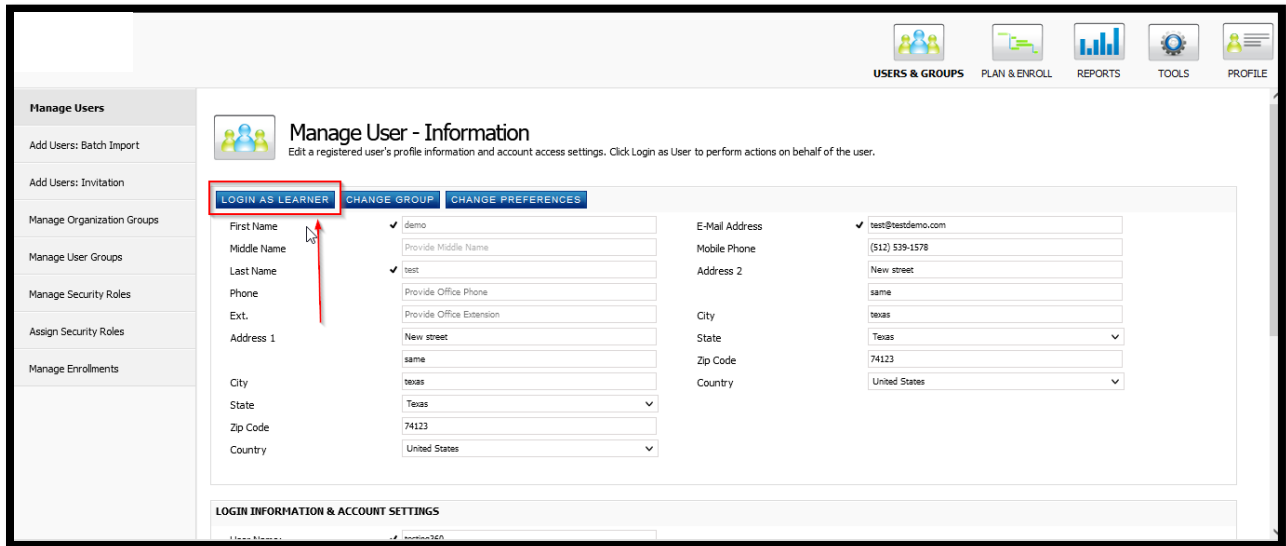
The screenshot shows the 'Manage User - Information' page. It has tabs for 'LOGIN AS LEARNER', 'CHANGE GROUP', and 'CHANGE PREFERENCES'. The 'CHANGE PREFERENCES' tab is active. The page contains various input fields for user information, including First Name (demo), Middle Name, Last Name (test), Phone, Ext., Address 1, City, State (Texas), Zip Code (74123), Country (United States), E-Mail Address (test@testdemo.com), Mobile Phone ((512) 539-1578), Address 2, City, State (Texas), Zip Code (74123), and Country (United States).

You also have the option to lock, expire or disable a user account by clicking the YES or NO option.

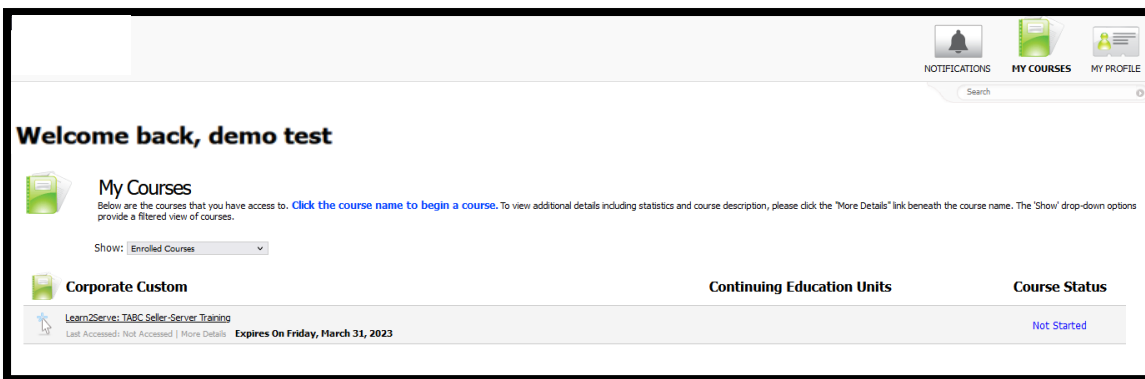
* NO is selected by default.

The screenshot shows the 'LOGIN INFORMATION & ACCOUNT SETTINGS' section. It includes fields for User Name (testing360), Password, Confirm Password, Account Locked (radio buttons for Yes/No, with No selected), Account Expired (radio buttons for Yes/No, with No selected), Account Disabled (radio buttons for Yes/No, with No selected), Visible On Reports (radio buttons for Yes/No, with No selected), and Change Password On Next Login (radio buttons for Yes/No, with No selected). There is also an Expiration Date field. At the bottom, there are 'CUSTOM FIELDS' and 'REPORTING FIELDS' sections, and 'CANCEL' and 'UPDATE' buttons.

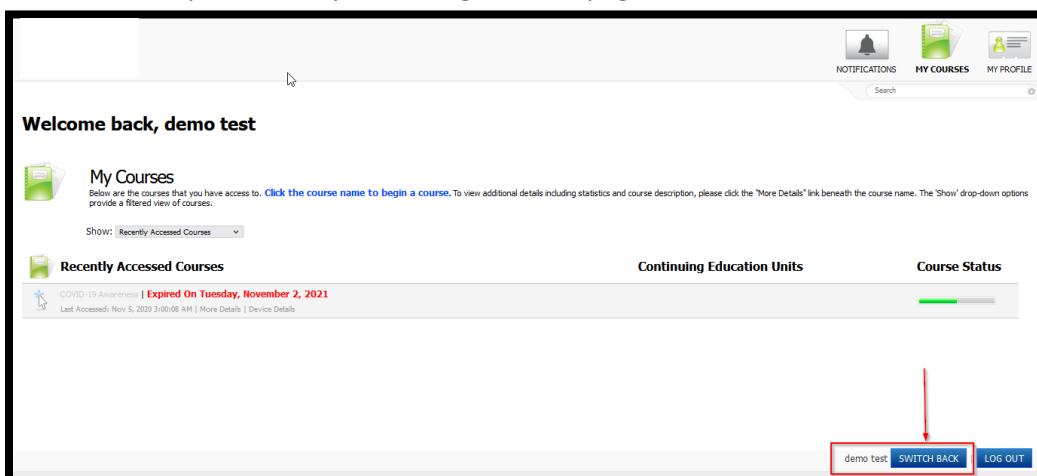
Click the LOGIN AS LEARNER button to access course completion records.



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.



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.

IMPORT SETTINGS

Import File
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:

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

Sample Import file view

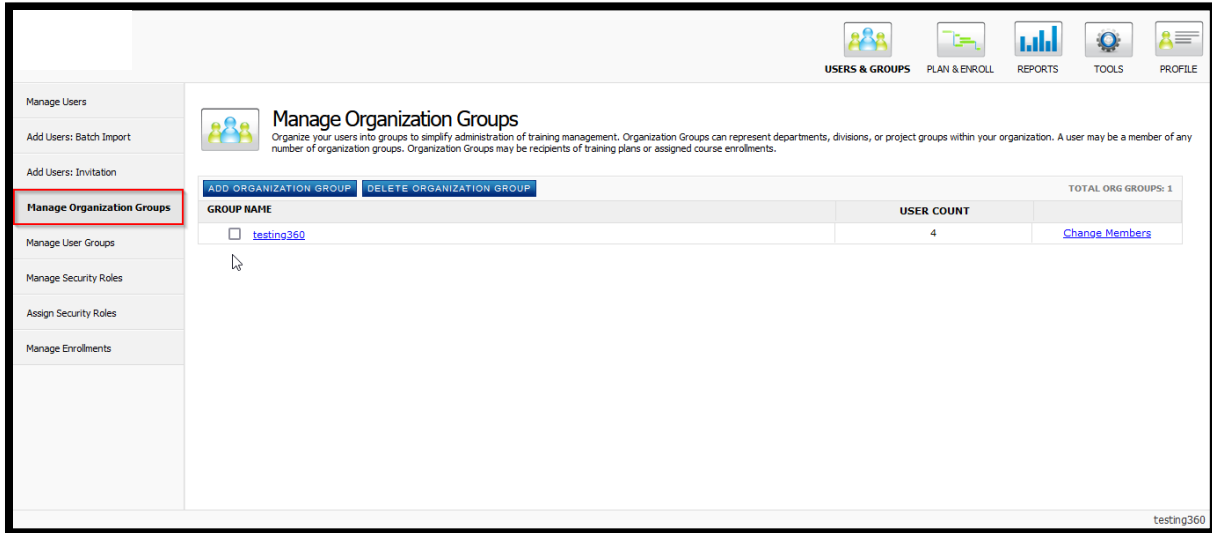
1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
	First Name	Middle Name	Last Name	Office Phone	Office Phone	Phone	Home Address	Home Address	City	State	Zip	Country	Email Address	Password	User Group	Organization	User Name				
2	Joe		Learner							TX		United States	Joe.Learner	eLearning1#		Company: Joe.Learner@company.com					
3																					
4																					
5																					
6																					
7																					
8																					
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23																					

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

STEP 6

MANAGE ORGANIZATION GROUP

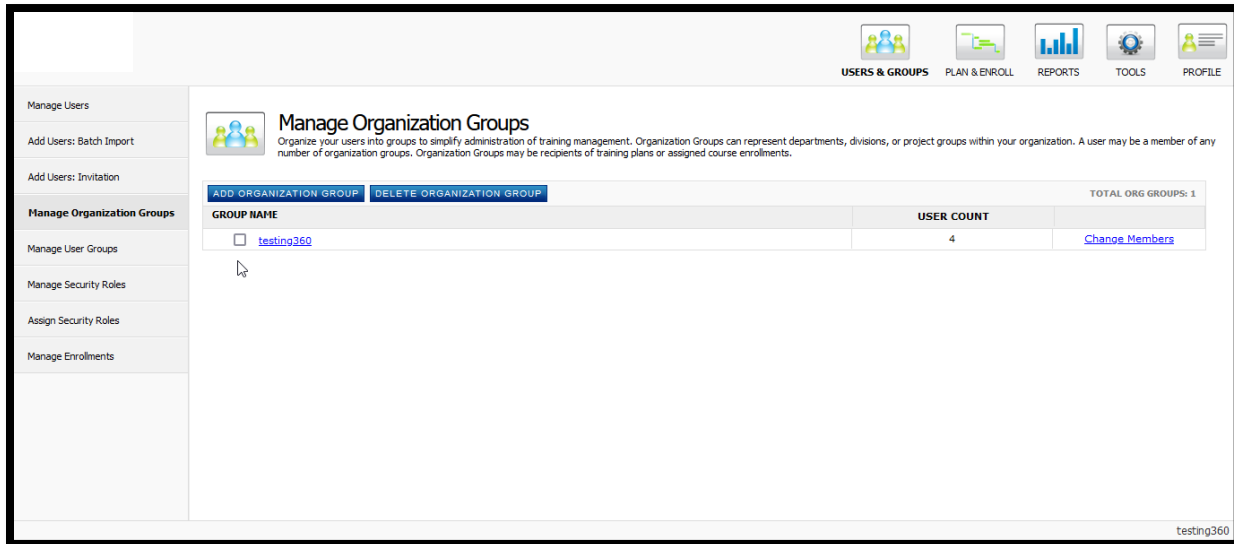
Click MANAGE ORGANIZATION GROUPS on the top left-hand side of the screen.



The screenshot shows the 'Manage Organization Groups' page. The left sidebar contains a menu with the following items: 'Manage Users', 'Add Users: Batch Import', 'Add Users: Invitation', 'Manage Organization Groups' (highlighted with a red box), 'Manage User Groups', 'Manage Security Roles', 'Assign Security Roles', and 'Manage Enrollments'. The main content area has a header with 'Manage Organization Groups' and a sub-header with 'ADD ORGANIZATION GROUP' and 'DELETE ORGANIZATION GROUP' buttons. Below this is a table with columns 'GROUP NAME', 'USER COUNT', and 'TOTAL ORG GROUPS: 1'. The table contains one row with 'testing360' as the group name, a user count of 4, and a 'Change Members' link. A mouse cursor is pointing at the 'testing360' link.

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

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



This screenshot is identical to the previous one, but the 'testing360' link in the table is highlighted with a blue background, indicating it has been clicked. The mouse cursor is still present over the link.

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

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

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

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

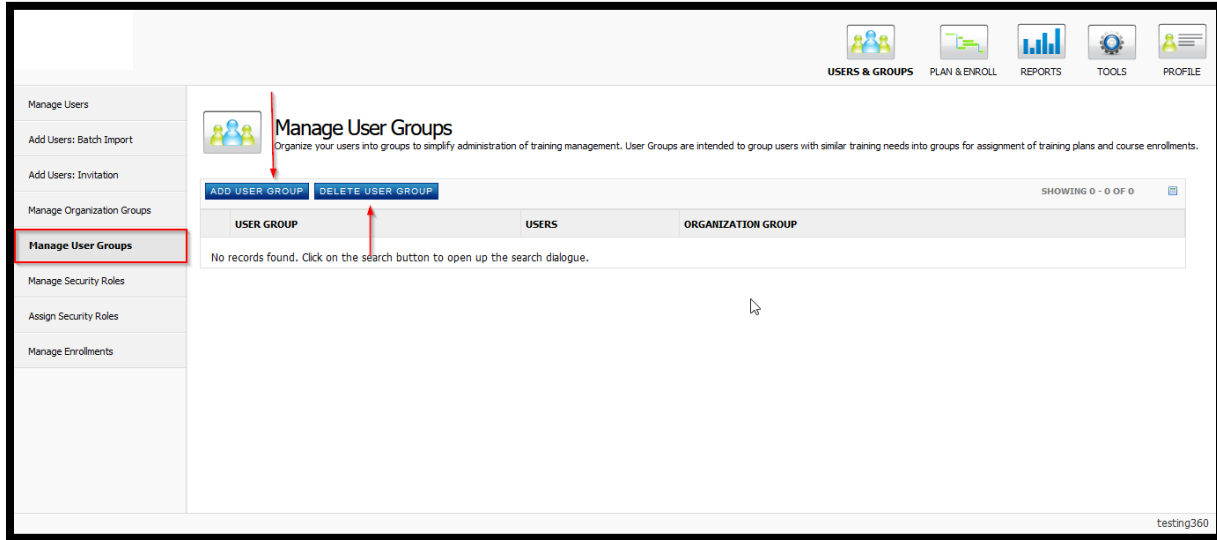
	FIRST NAME	LAST NAME	USER NAME	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	No
<input type="checkbox"/>	demo	one	demoone@demo.com	No
<input type="checkbox"/>	demo	three	demothree@demo.com	No
<input type="checkbox"/>	demo	two	demo2@demo.com	No

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.

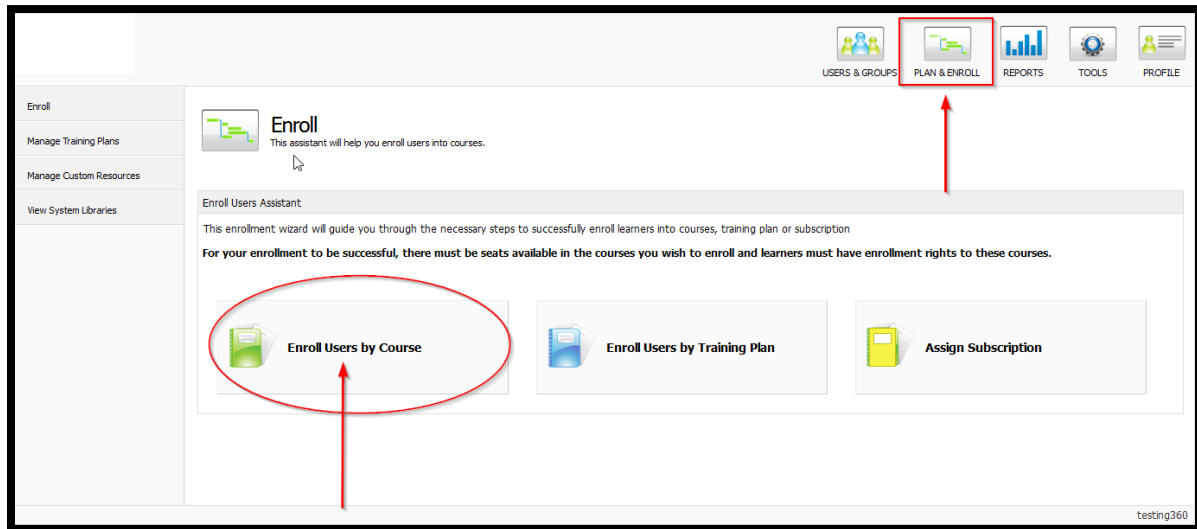
There are two options available: ADD USER GROUP or DELETE USER GROUP.



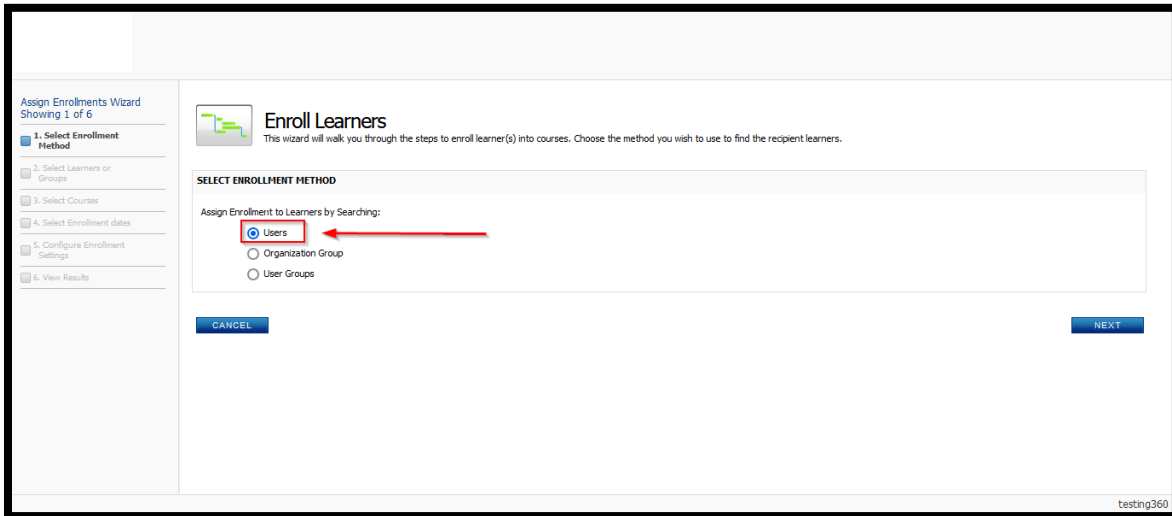
STEP 8

PLAN & ENROLL

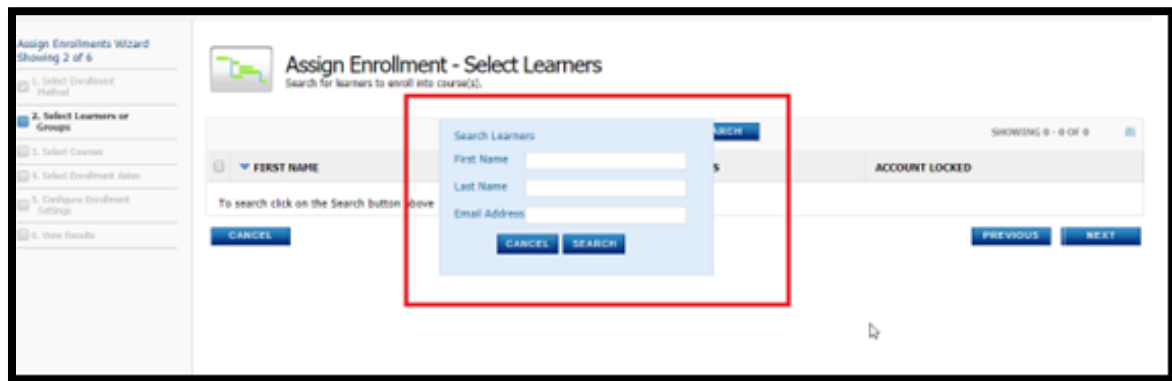
Select ENROLL USERS BY COURSE



Then select USERS.



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	demothree@demo.com	No

testing360

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

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

testing360

Select the desired course from the results.

Assign Enrollment - Select Courses
Select the courses you wish to enroll learners into.

SEARCH

SHOWING 1 - 2 OF 2

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 360 Training - 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 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 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

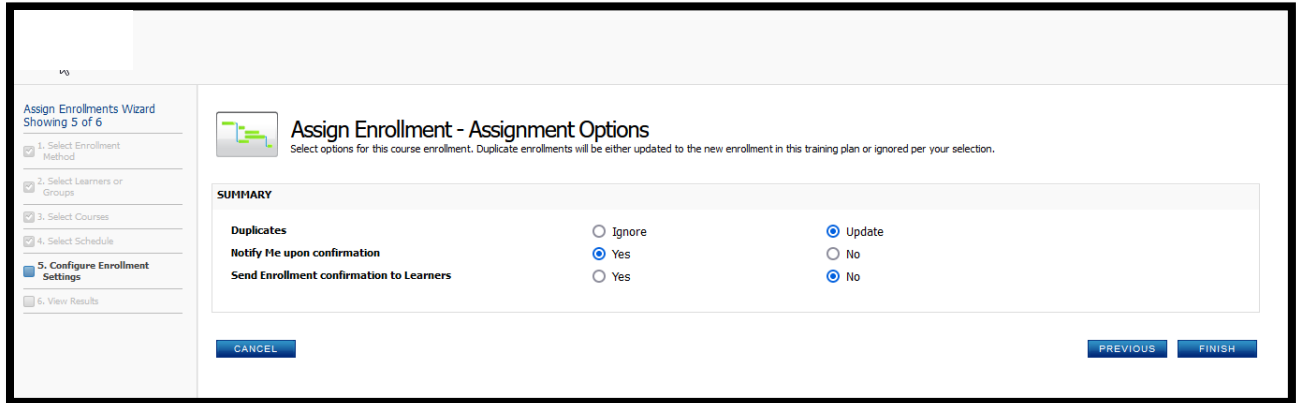
INDIVIDUAL COURSES

	Start Date	End Date	Contract End Date
Learn2Serve: TABC Seller-Server Training	<input type="text"/>	<input type="text"/>	02/29/2024

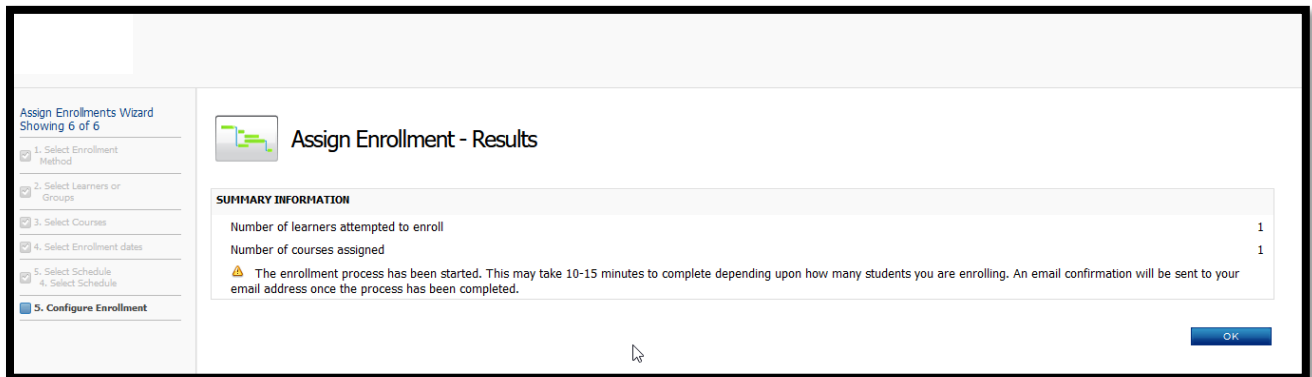
CANCEL PREVIOUS NEXT

testing360

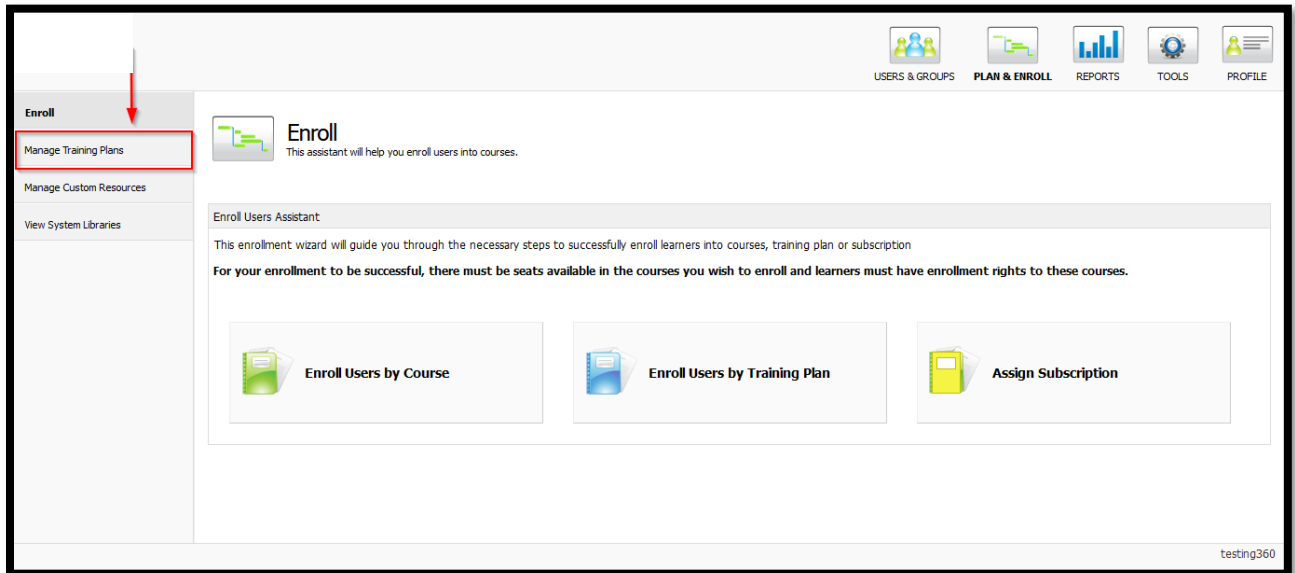
On the final screen of the training plan assignment, you can choose to Send Enrollment Confirmation to Learner by choosing YES. Click FINISH to complete the enrollment. You must click FINISH to ensure the course(s) is assigned.



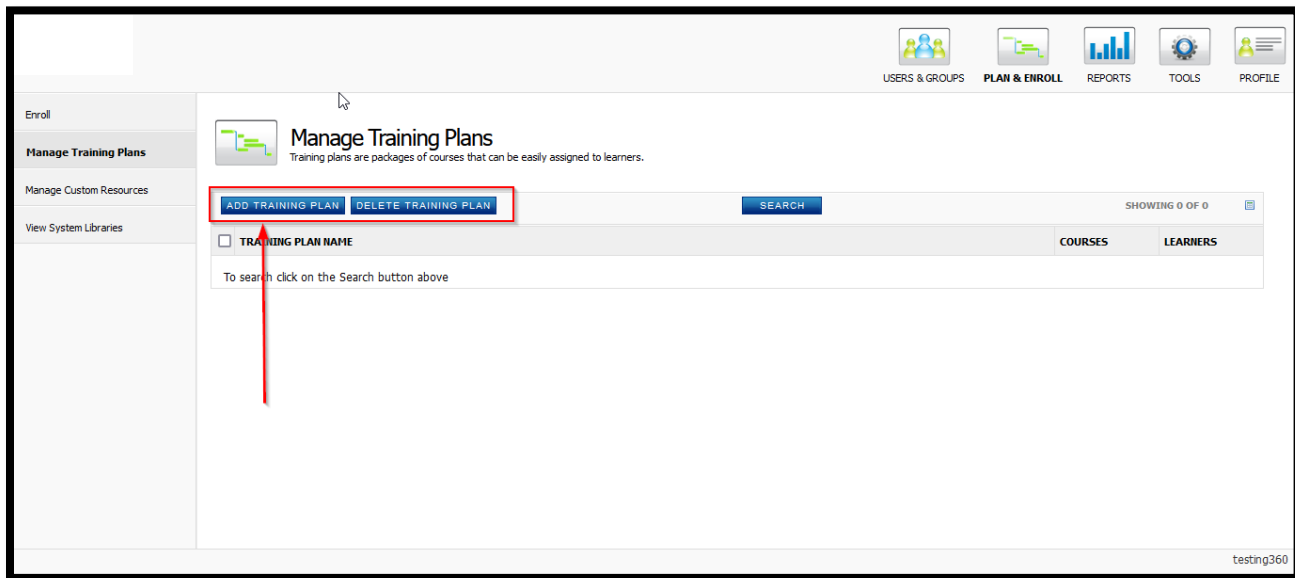
Once you've clicked "finish," you will see a confirmation screen confirming the enrollment was successful.



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 at step 1 of 3. The main area is titled 'Add Training Plan' with the instruction 'Fill out the basic information of the new training plan and click the Next button to proceed.' Below this is a 'SUMMARY' section with two fields: 'Training Plan Name' and 'Description'. Both fields contain the text 'DEMO TRAINING'. A red rectangular box highlights both the text input fields and their respective labels. At the bottom right, a red arrow points to a blue 'NEXT' button. A 'CANCEL' button is located at the bottom left. The top navigation bar includes icons for 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The left sidebar shows the wizard progress: '1. Training Plan Summary' (active), '2. Selected Courses', and '3. Confirmation'. The footer text 'testing360' is visible in the bottom right corner.

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 at step 2 of 3. The main area is titled 'Add Training Plan' with the instruction 'Select Course(s) to add to Training Plan.' Below this is a 'COURSES' section with a table. A search dialog box is open over the table. The dialog has four input fields: 'Course Name', 'Contract Name', 'Business Key', and 'Max Expiration Date'. A red arrow points to a blue 'SEARCH' button in the dialog. The table has columns: 'BUSINESS KEY', 'COURSE DESCRIPTION', 'EXPIRATION DATE', and 'CONTRACT NAME'. The table is currently empty, showing 'SHOWING 0 - 0 OF 0'. A 'PREVIOUS' button is on the left and a 'NEXT' button is on the right. The left sidebar shows the wizard progress: '1. Training Plan Summary' (checked), '2. Selected Courses' (active), and '3. Confirmation'. The footer text 'testing360' is visible in the bottom right corner.

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**

testing360

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

Select Font | Size | B | I | U | x | x | [Icons]

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.

Enroll

Manage Training Plans

Manage Custom Resources

View System Libraries

ADD TRAINING PLAN DELETE TRAINING PLAN SEARCH

SHOWING 1 OF 1

TRAINING PLAN NAME	COURSES	LEARNERS
DEMO TRAINING	2	0

testing360

Select ENROLL USERS BY TRAINING PLAN

Enroll

Manage Training Plans

Manage Custom Resources

View System Libraries

USERS & GROUPS PLAN & ENROLL REPORTS TOOLS PROFILE

Enroll
This assistant will help you enroll users into courses.

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.

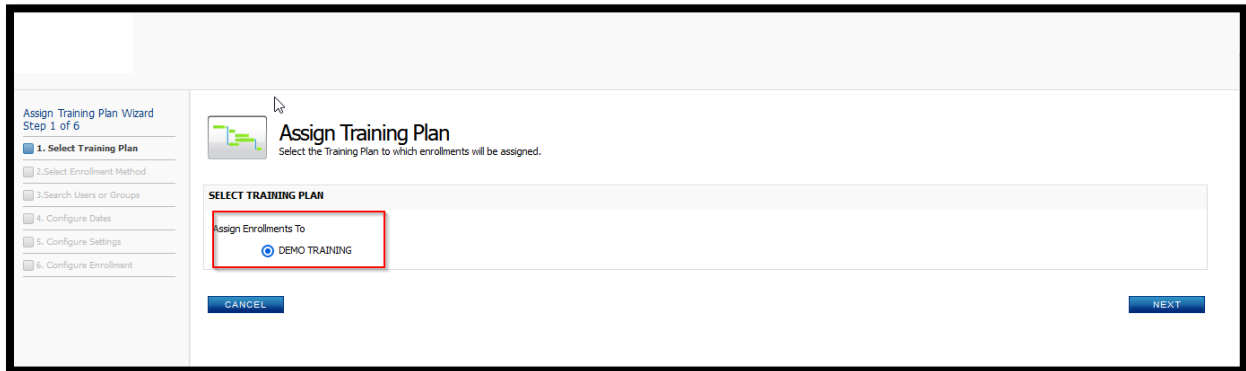
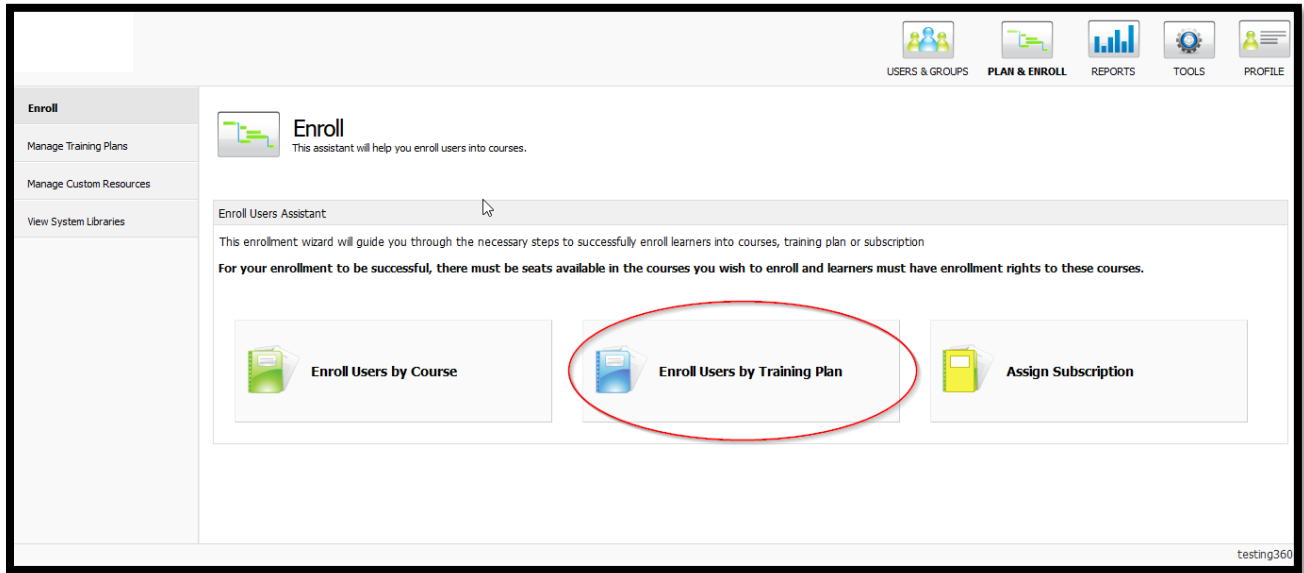
Enroll Users by Course

Enroll Users by Training Plan

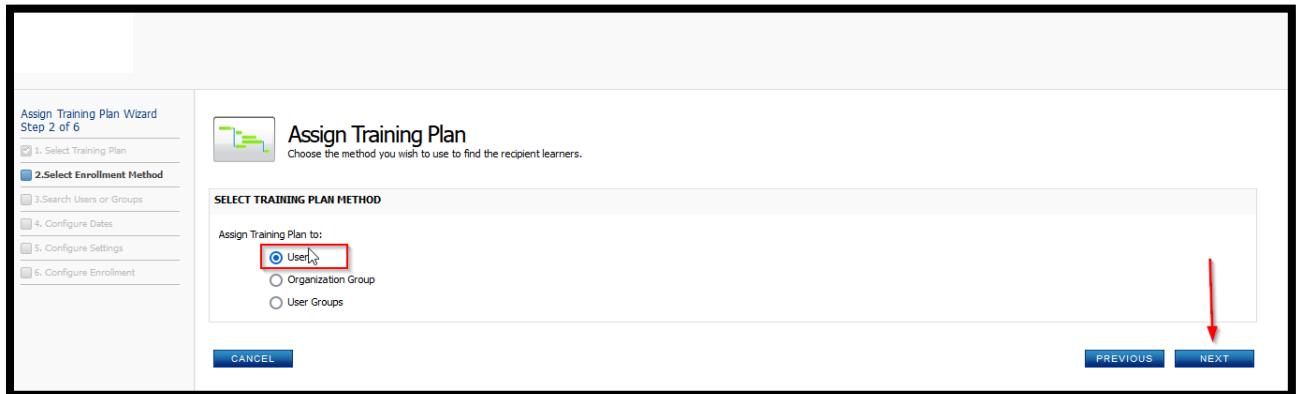
Assign Subscription

testing360

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

FIRST NAME	LAST NAME	USER NAME	SECURITY ROLE	ACCOUNT LOCKED
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.

LMS Enrollment Results

360training.com Support <support@360training.com>
To: Rana Awais Javed

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

This Message originated outside your organization.

Assign Enrollment - Results

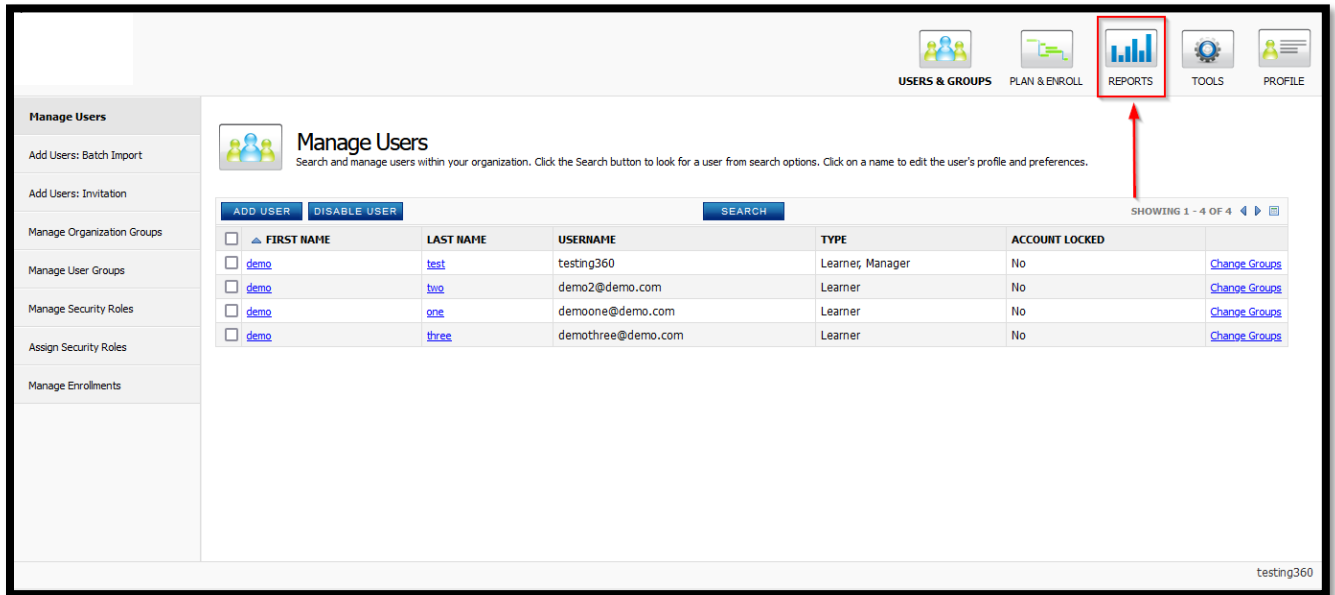
The enrollment process has been completed. Below is a summary of assignments.

Summary Information	
Number of learners attempted to enroll	1
Number of learners enrolled successfully	0
Number of courses assigned	0
Total number of enrollments created	0
Number of errors encountered	0

STEP 9

REPORTS – Tracking progress via On-Demand Reports

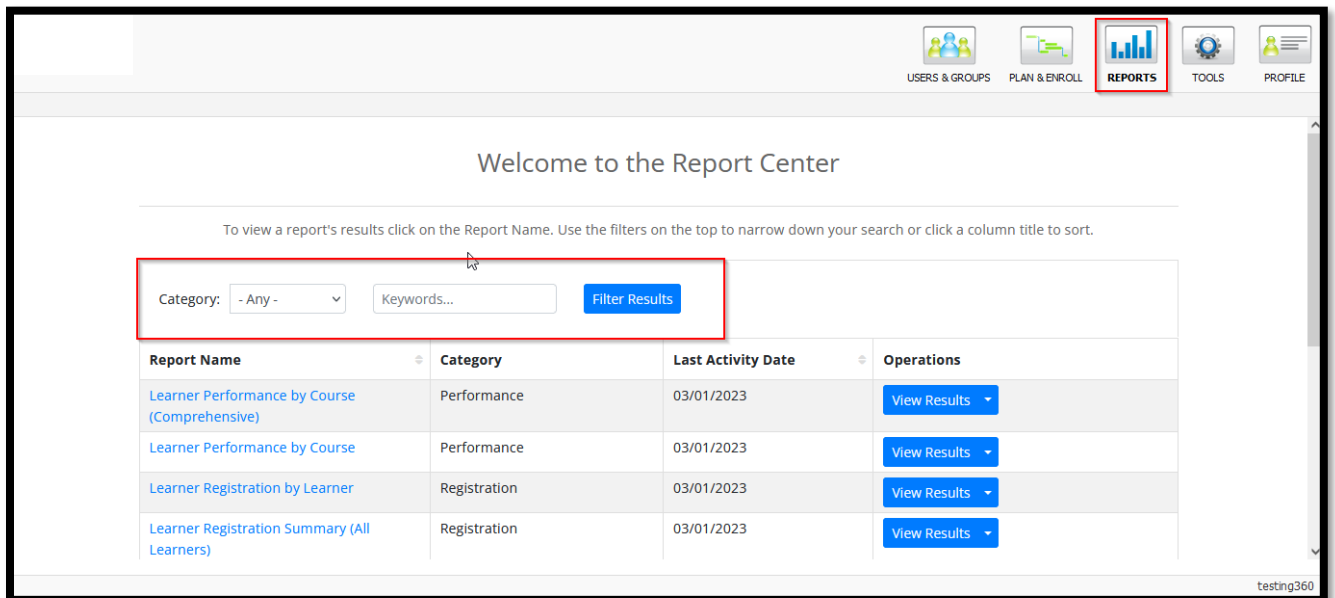
Once logged in, select REPORTS in the top right corner of the screen.



The screenshot shows the 'Manage Users' interface. In the top right navigation bar, the 'REPORTS' icon (a bar chart) is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'Manage Users' section is visible, featuring a search bar and a table of users. The table has columns for 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. The 'REPORTS' menu item is highlighted in the top right corner of the screen.

FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED
demo	test	testing360	Learner, Manager	No
demo	two	demo2@demo.com	Learner	No
demo	one	demoone@demo.com	Learner	No
demo	three	demothree@demo.com	Learner	No

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



The screenshot shows the 'Report Center' page. The 'REPORTS' menu item is highlighted in the top navigation bar. Below the navigation bar, the 'Report Center' section is visible, featuring a search bar and a table of reports. The search bar has a 'Category' dropdown menu set to '- Any -', a 'Keywords...' input field, and a 'Filter Results' button. The table has columns for 'Report Name', 'Category', 'Last Activity Date', and 'Operations'. The 'REPORTS' menu item is highlighted in the top right corner of the screen.

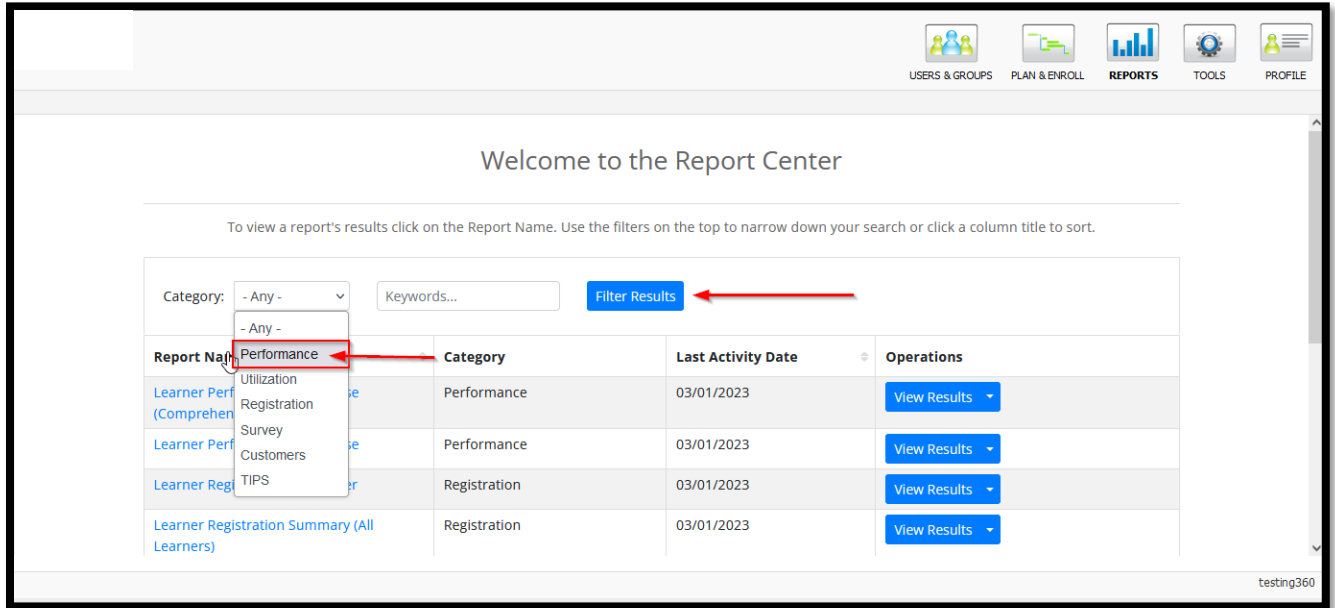
Welcome to the Report Center

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.

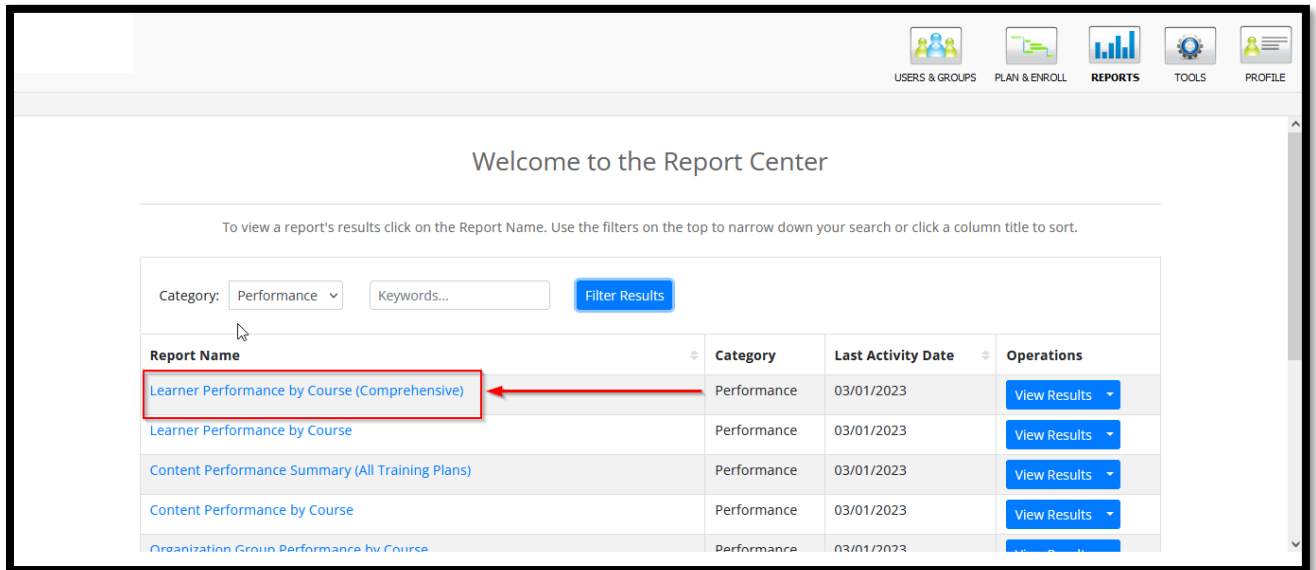
Category: - Any - Keywords... Filter Results

Report Name	Category	Last Activity Date	Operations
Learner Performance by Course (Comprehensive)	Performance	03/01/2023	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

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.

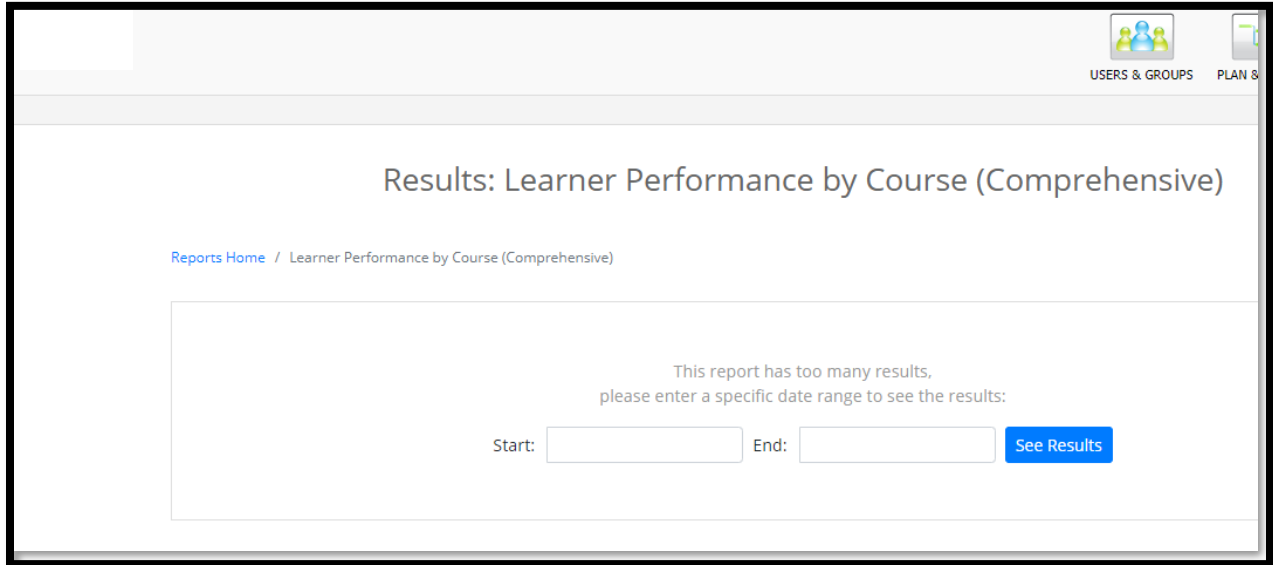


To run the report, click on the report name.

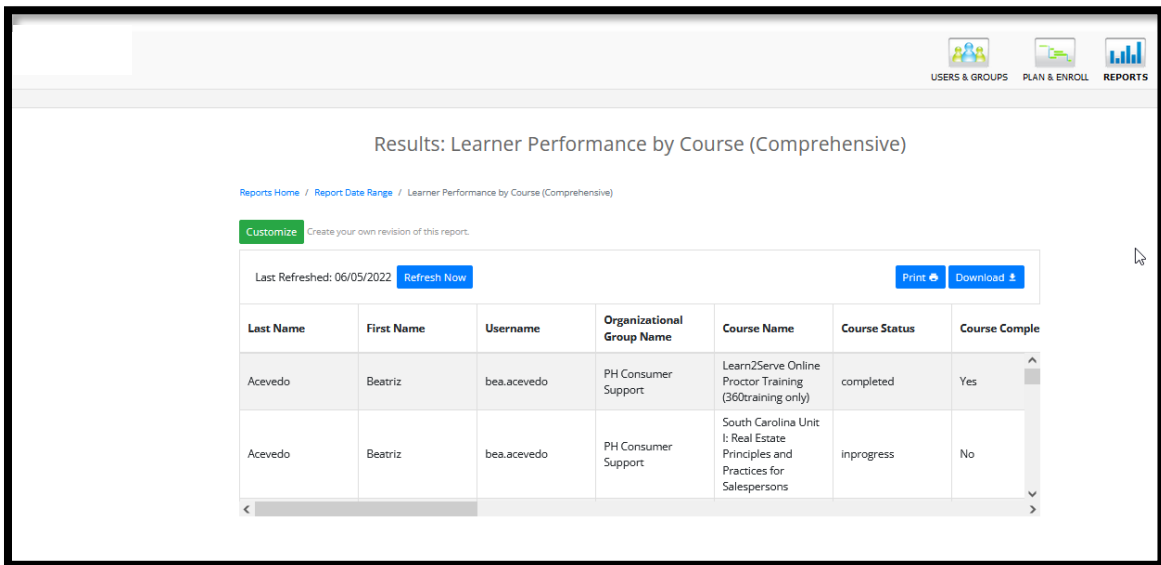


Select the date range you want the report to cover and click SEE RESULTS.

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.



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.



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.

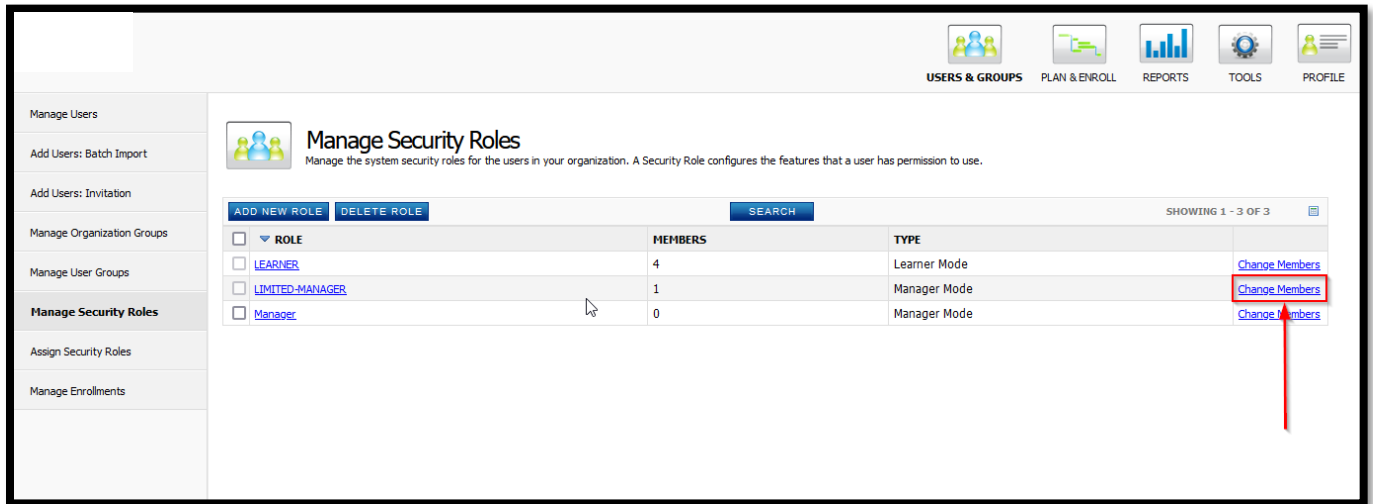
The screenshot shows the 'Manage Security Roles' page. The left sidebar has 'Manage Security Roles' highlighted with a red box. The main content area has 'ADD NEW ROLE' and 'DELETE ROLE' buttons highlighted with a red box. A red arrow points to the 'SEARCH' button. Below the buttons is a table with columns 'ROLE', 'MEMBERS', and 'TYPE'. The table is currently empty, with the text 'To search click on the Search button above' displayed. The top navigation bar includes 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner shows 'testing360'.

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.

The screenshot shows the 'Manage Security Roles' page with search results. The left sidebar has 'Manage Security Roles' highlighted with a red box. The main content area has 'ADD NEW ROLE' and 'DELETE ROLE' buttons highlighted with a red box. A table with columns 'ROLE', 'MEMBERS', and 'TYPE' is displayed. The table contains three rows: 'LEARNER' (4 members, Learner Mode), 'LIMITED-MANAGER' (1 member, Manager Mode), and 'Manager' (0 members, Manager Mode). Each row has a 'Change Members' link. The top navigation bar includes 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner shows 'testing360'.

ROLE	MEMBERS	TYPE
<input type="checkbox"/> LEARNER	4	Learner Mode
<input type="checkbox"/> LIMITED-MANAGER	1	Manager Mode
<input type="checkbox"/> Manager	0	Manager Mode

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.

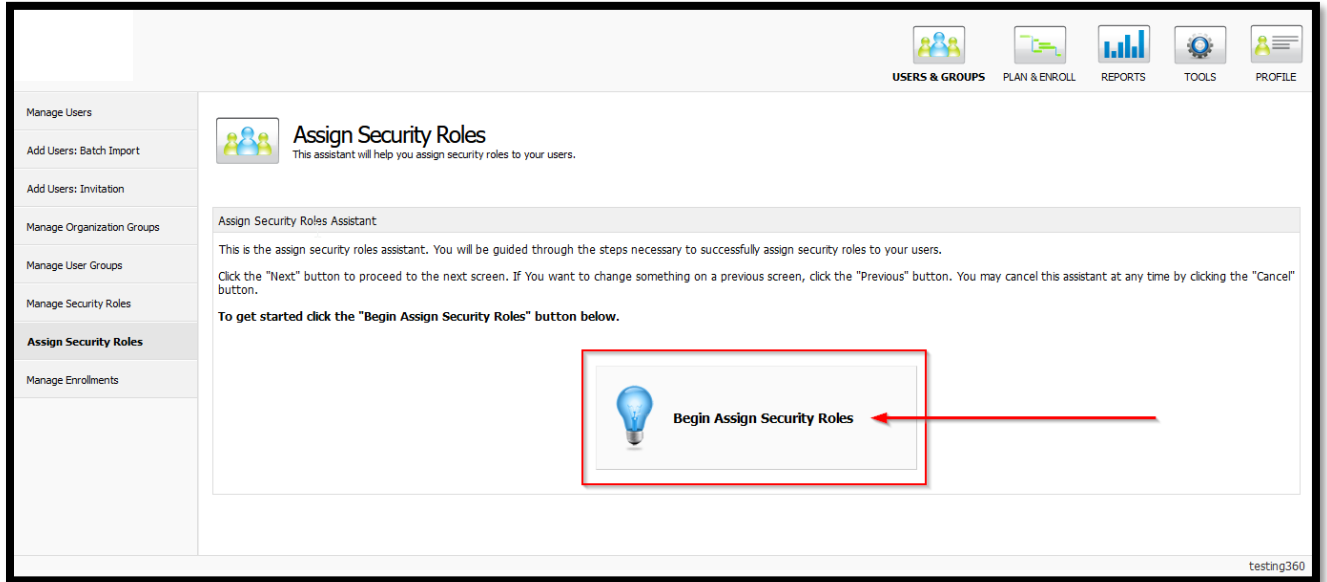


STEP 11

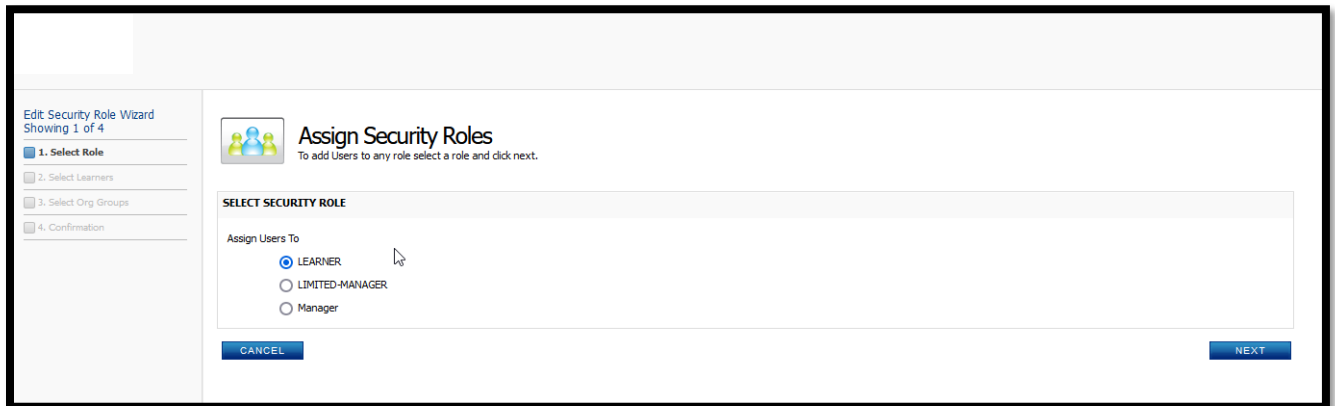
ASSIGN SECURITY ROLES

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.

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

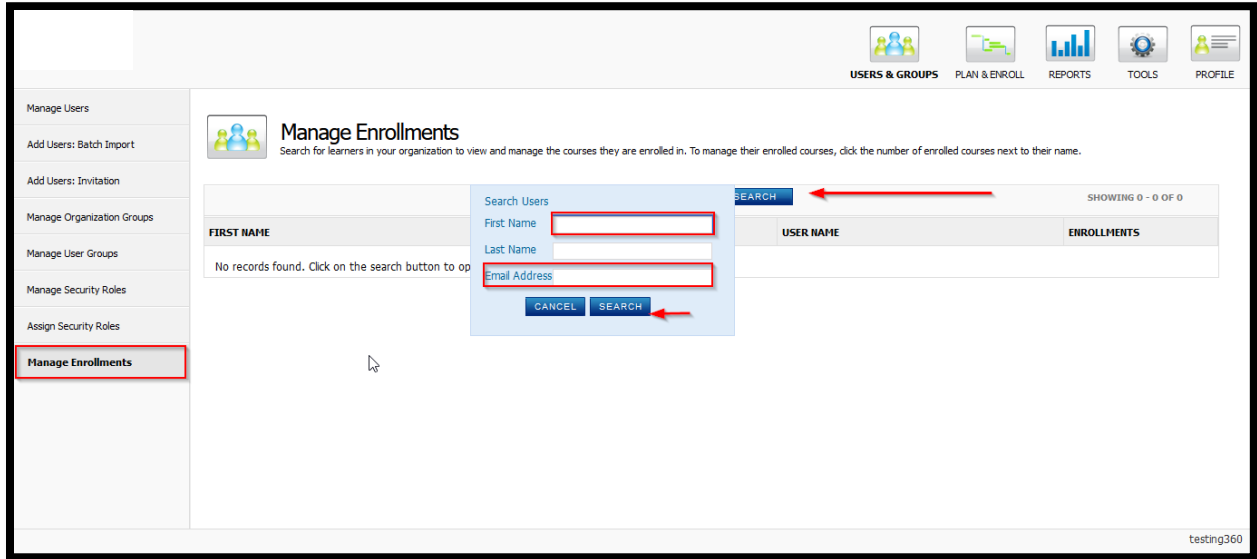
testing360

Click FINISH and a confirmation window will appear.

STEP 12

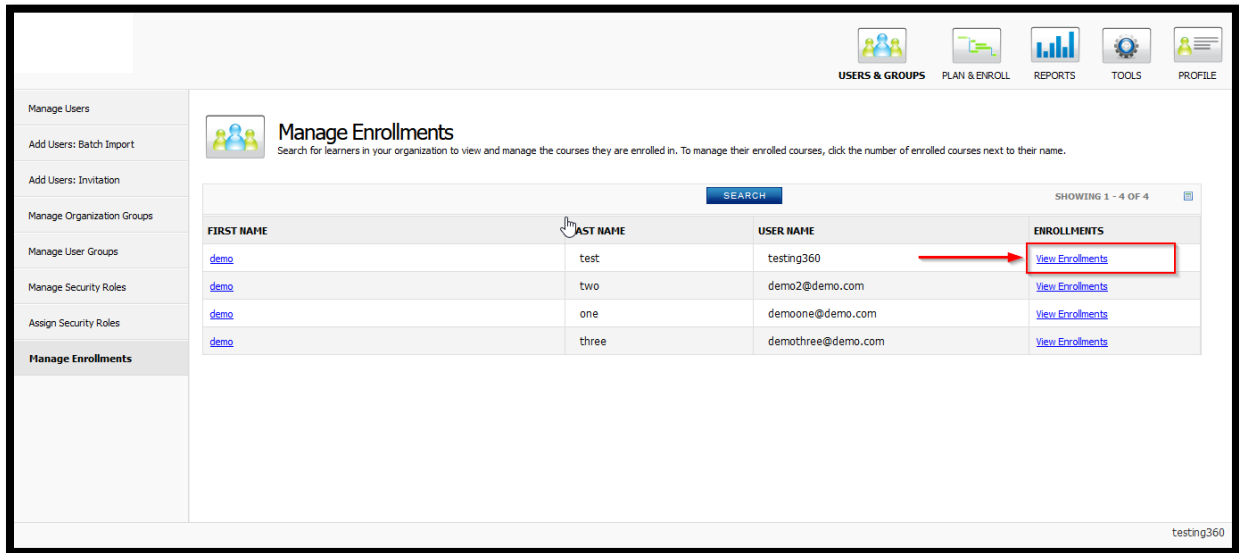
MANAGE ENROLLMENTS

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. A search modal is open over the table, with red boxes highlighting the 'First Name', 'Last Name', and 'Email Address' input fields, and the 'SEARCH' button. A red arrow points to the 'SEARCH' button in the modal. The table below is empty, with the text 'No records found. Click on the search button to open the search modal.' The left sidebar has 'Manage Enrollments' highlighted with a red box. The top navigation bar includes 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner 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 with a search modal closed. The table displays four users. A red box highlights the 'View Enrollments' link for the first user, 'testing360'. A red arrow points to this link. The table has columns for 'FIRST NAME', 'LAST NAME', 'USER NAME', and 'ENROLLMENTS'. The left sidebar has 'Manage Enrollments' highlighted with a red box. The top navigation bar includes 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner 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)

<input type="checkbox"/> 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

Additional interface elements include a sidebar with 'Manage Enrollments' selected, a top navigation bar with 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE', and a 'CANCEL' button below the table.

Profile

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

CUSTOMER PROFILE

Customer Name: 390 Vendor Demo | Website URL: Provide Website URL

First Name: Vendor | Email Address: admin@390vendor.com

Last Name: Admin | Account Status: Active Inactive

Phone: Provide Phone Number | Address 1: Provide Street Address

Ext.: Provide Extension | Address 2: Provide Street Address

City: Provide City | State: Armed Forces Americas | Country: United States

Zip Code: Provide Zip/Postal Code

Buttons: CANCEL, SAVE

Footer: Rana Demo | Manager Mode | LOG OUT

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 displays the 'Manage Users' interface. At the top right, there are navigation icons for 'USERS & GROUPS', 'PLAN & ENROLL', and 'PROFILE'. The main content area features 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'. A red arrow points to a dropdown menu in the bottom right corner, which is currently set to 'Manager Mode' and has 'Learner Mode' and 'Manager Mode' as options. The user 'Rana Demo' is logged in.

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

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