

There are several different types of users with varying levels of administrator privileges. Please review the instructions below for adding and customizing user type.

User Type

- **Admin/Company Admin**—Can access all functions of the LMS. While admins can technically be enrolled in courses, the need to switch to student view does not make for a good experience. It is recommended that admins who are also learners have a separate learner account.
- **Learner/Student**—May be enrolled into courses. Is not able to edit, manage, or delete. Does not have access to the Admin or Resources tab.
- **Parents/Mentors**—Designed to login and check on their child/student from a drop down box on their Home Dashboard, revealing the selected student’s courses, scores, etc. Parents cannot be enrolled in courses and have limited tools.
- **Faculty**—Instructors for courses. Can also be enrolled as a student. Does not have access to the Admin tab. May create and edit their courses (courses in which they are the assigned instructor) and manage their own course tools. May clone content from their own courses to make new courses. Disabled by default.
- **Staff**—Permissions between an Admin role and a Faculty role. Can be enrolled in courses. When NOT enrolled in a course, this role may view all course tools and content but not add, edit, or delete content. Cannot view gradebook. Has Admin tab with some tools turned off. Disabled by default.
- **Alumni**—Moves user out of enrollment lists. If not deactivated, can still access course records but cannot be enrolled in anything new. Deactivate before converting to alumni.
- **Customer User Roles/Types**—Custom User Roles can be created within the LMS. If you’d like to create custom administrator privileges or roles, please contact the Online Training Help Desk.

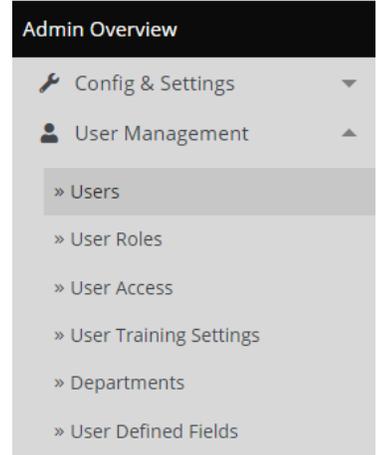
User Training Settings

These are settings to group your students for bulk enrollments and Training Records reporting. Each user can be assigned to one of the following: Job Title, Cost Center, and Site. Add these before setting up users to assign during user setup and allow for bulk enrollment, creating custom training paths, and training records sorting. They are found under User Training Settings. (see [Bulk Enrollments](#) for more information)

Welcome Emails

Students can either be assigned a username and password at the time of set-up or sent a welcome email. To send a welcome email, from the Students screen, mark the box next to the applicable student or students and click “Send Welcome Email.” This will generate an email to the address on file and prompt the student to create their own username and password. These links are unique to each recipient and must not be shared. Sharing the welcome email links will compromise training records. Welcome Email text can be customized by going to the Admin tab —> Config & Settings —> Application Settings —> Email Settings. Welcome emails can also be sent automatically when importing students. Note: If a username/password is pre-assigned, login credentials need to be communicated directly to the student. A welcome email will not provide them.

1. From the **Admin** tab, click on **Users** under the **User Management** menu
2. Click **plus sign**  on the right side of the User Management bar to add a new user.
3. Enter a **user id** (this can be anything, must be unique, ex. Employee Number)
4. Enter **first name** and **last name**
5. Enter an **email address** (it is recommended each user have a unique email address. If this is not possible, be sure to create a username and password and provide it to the user)
6. Add a username and password **OR** leave these fields blank to send a Welcome Email (if sending a Welcome Email, search for your newly created user after clicking **Save**, then click the box next to their last name and click “Send Welcome Email” button)
7. All other fields are optional, though if user settings have been identified, choose a Job Title, Site, and Cost Center. This facilitates learning paths, bulk enrollments, and training records sorting.
8. Click **Save**



Importing/Updating Users

Users can be imported/updated in bulk under the **Admin** tab and clicking on **Courses & Communities** under the Administration menu and then **Import/Export**. Sample import documents are available. Note: When updating users with the import function, if the value in User ID/Unique ID column (column A) is edited, the row will be seen as a NEW user.

Enrollment

Enroll by Student

1. From the **Admin** tab, click on **User Management**, then **Users**
2. Find the Student to be enrolled and click the **Courses** icon
3. Click **Enroll in New Course**
4. Click **Add** next to the course to add it to the student’s course listing

Helpful Hint: The student’s course listing features a “Drop” button. DO NOT CHOOSE THIS. Dropping a course from a student’s list will drop their training records. The Drop feature should only be used in cases of mistaken enrollments.

Enroll by course

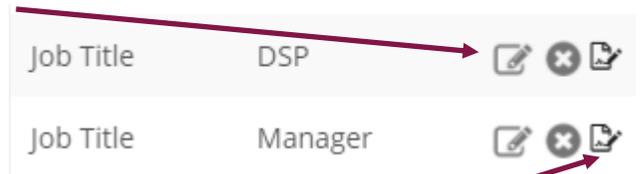
1. Click on **Courses** at the top of the page
2. Click on the **Course** for which you want to enroll
3. Click **Enroll Learner** above the course roster
4. Check the box next to the student(s) name and click **Add Learner**

Bulk Enrollments

User Training Settings are used to categorize your students in three different ways: **Job Title**, **Site** and **Cost Center**. This allows for bulk enrollments, the creation of custom learning paths, and training record sorting. We recommend creating a **Cost Center** with your company name applied to all students. Using this, you can then enroll all students at once. Larger companies may want to split users into multiple **Cost Centers** based on service type such as residential and vocational.

Additionally, if you categorize others by **Site** or **Job Title**, you may enroll groups of people by those categories. To bulk enroll, follow the instructions below after creating and assigning User Settings:

1. Edit the **User Setting** for which you would like to enroll
2. Select the courses for which you would like to register student using the checkboxes
3. Click **Save**
4. Click the **Enroll** icon associated with that training setting
5. When the page refreshers signaling enrollment, return to the User Setting, edit and **unselect** the checked courses, then save again. Note: If you do not unselect the courses, new students assigned to those User Settings will be automatically enrolled in the selected courses.



The **Enroll Current Users** button at the top of the User Training Settings page will process enrollments for ALL User Training Settings at once without having to click the enrollment button for each setting.

If you would like assistance customizing User Training Settings and custom learning paths for your organization, [book an appointment online](#).

Helpful Hint: Creating a “New Hire” Job Title is a great option for new employee enrollment. Create this setting, and select all the courses a new hire would be enrolled in. Upon setup, apply this setting to a new hire and click Save, and that user will automatically be enrolled in all of those courses. Immediately edit the user and change the Job Title to reflect their permanent Job Title setting and the new hire courses will remain.

Expiring Enrollments (if implemented)

- A list of enrollments which have expired or are expiring within the next 60 days is available in the **Admin** tab, **Reports**, then **Course Expiring Enrollments**. Enrollments can be extended here.
- Courses can have set Start and Expiration dates or a Course Length in Days (30, 60, 90, etc).
[View the Applying Course Dates guide](#)