

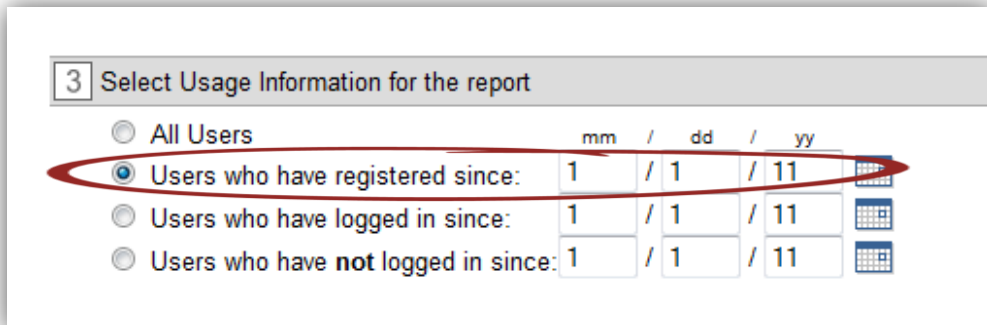
# Manage TrainCaster: 5 Minutes a Day

Streamline administration of your TrainCaster environment by automating tasks. After your initial time investment to set up these metrics, you'll be able to monitor your training environment quickly and easily.




## 1 Check for new user accounts.

This can be done daily, weekly, or even monthly – depending on your needs and the number of potential users added to the system.

To find out if you have any newly registered users, run the 'Registered Subscribers' report. Since you want to find new subscribers, select 'Users who have registered since:' in Step 3. Enter an appropriate start date.



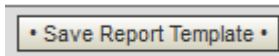
3 Select Usage Information for the report

<input type="radio"/> All Users	mm	/	dd	/	yy	
<input checked="" type="radio"/> Users who have registered since:	1	/	1	/	11	
<input type="radio"/> Users who have logged in since:	1	/	1	/	11	
<input type="radio"/> Users who have <b>not</b> logged in since:	1	/	1	/	11	

Select the data fields you want to see on the report: select everything you need to update the user account, if necessary.

Run the report.

Save the report as a template. Click the button in the top right corner of the report.



The report will be run at the interval you select: daily, weekly, monthly, etc. You can have the report emailed to you every time it's run.

## 2 Modify user account privileges if necessary.

User accounts may have been added as 'Trainee' accounts. If any accounts need to be upgraded to manager privileges, make those changes now.

Click the 'User Manager' tab. Then click 'Manage Users'.

Find the employee to modify in the list, or begin typing the name in the search box. With the name highlighted, click 'Modify User'.

The screenshot shows the 'User Manager' interface. At the top, there is a 'Name Search' field containing 'smi' and a 'Select User Grouping' dropdown menu set to 'Department'. Below this is a list of users with columns for Name, Department, and User Type. The user 'SMITH, ANDREA (Training) (A)' is highlighted in blue. At the bottom, there are four buttons: 'View User', 'Modify User', 'Delete User', and 'Finished'. The 'Modify User' button is highlighted with a red box. A text box with arrows pointing to the search field and the highlighted user name contains the following text:

Begin typing the name in the search box - the matches will be highlighted below.

With the employee name highlighted click 'Modify User'.

Scroll to the 'User Type' area of the screen. Select Manager.

**User Type:**

- Administrator  
Allow user to have complete access to all systems
- Manager**  
Allow user to Manage Courses, Manage Curricula
- Trainee

The manager privileges area will expand. Refer to the following series of images to set the appropriate privileges.

## Course Manager

**Manager**  
Allow user to Manage Courses, Manage Curricula, Manage Users and/or Run Reports

Select Course and Curriculum Management Rights

- 1** May Edit Courses
- Select Course Editing Rights
- 2**  Assigned Courses
- All Courses
- 3** May Edit Curriculums
- Select Curriculum Editing Rights
- 4**  Assigned Curriculums
- All Curriculums

Select User Management and Reporting Rights

**Course Manager Privileges**

- 1** Check the 'May Edit Courses' box.
- 2** Choose either 'Assigned Courses' or 'All Courses'.  
**NOTE:** Assigned courses are specifically assigned for editing, NOT training.
- 3** If user can edit curriculums, check the box.
- 4** Choose either 'Assigned Curriculums' or 'All Curriculums'.  
**NOTE:** Assigned curriculums are specifically assigned for editing, NOT training.

## User Manager

### USER MANAGER PRIVILEGES

- 1** If this account is for a User Manager, check the boxes to indicate if s/he can add/modify/delete user accounts. Check all that apply.
- 2** To limit the type of user account that can be edited to trainees, click the radio button. To allow editing of both trainee and manager accounts, click the radio button.
- 3** To limit the curriculums that can be assigned to other user accounts by this user, click 'May assign only their assigned...'.  
To allow this account to modify training records stored in the system, check the box.
- 4** To allow this account to modify training records stored in the system, check the box.

#### Select User Management Rights

- May Add Users
- May Modify Users
- May Delete Users

**1**

#### Select which types of Users the Manager may Modify or Delete

- Trainees Only
- Trainees and Managers

**2**

#### Select Curriculum Assignment Rights

- Manager may assign only their assigned training Curriculums to Users
- Manager may assign any Curriculums to Users

**3**

- May Edit Training Records

**4**

#### Select Reporting Rights

- May Run Reports

#### Select Course Reporting Rights

- Assigned Courses
- All Courses

#### Select User Groupings for User Management and Reporting

- Own User Groupings
- Assigned User Groupings
- All User Groupings

## Report Manager

**Manager**  
Allow user to Manage Courses, Manage Curriculums, Manage Users and/or Run Reports

Select Course and Curriculum Management Rights

- May Edit Courses
  - Select Course Editing Rights
    - Assigned Courses
    - All Courses
- May Edit Curriculums
  - Select Curriculum Editing Rights
    - Assigned Curriculums
    - All Curriculums

**REPORTING PRIVILEGES**

- 1 If this user can run reports, check the box.
- 2 To limit reports to courses assigned to this user for reporting (not courses assigned for training), click the radio button.

Otherwise, select the 'All Courses' option.

- Manager may assign any Curriculums to Users
- May Edit Training Records

Select Reporting Rights

- 1  May Run Reports

Select Course Reporting Rights

- Assigned Courses
- All Courses

- 2

Select User Groupings for User Management and Reporting

- Own User Groupings
- Assigned User Groupings
- All User Groupings

## User Management & Reporting Limits

**Manager**  
Allow user to Manage Courses, Manage Curricula, Manage Users and/or Run Reports

Select Course and Curriculum Management Rights

May Edit Courses  
Select Course Editing Rights  
Assigned Courses

**User Management & Reporting Limits**

If this is a user manager and/or a report manager account...

- 1 Limit the user accounts and/or reporting access to this manager's own user grouping. (ex: this manager is in Human Resources and will only be able to add user accounts in HR and can only run reports on people assigned to HR.)
- 2 Limit user accounts and/or reporting access to the user groupings assigned for this purpose. This can include many user groupings. (ex: this manager is a supervisor in Engineering and needs access to several engineering groupings, but will not have access to the entire company.)
- 3 No limitations on which training records this manager can access or modify. Reports will show all training records that meet the criteria, regardless of user grouping.

Select User Groupings for User Management and Reporting

1 Own User Groupings  
 Assigned User Groupings 2  
 3 All User Groupings

### 3 Automate compliance reports.

Setup, save and automate the training compliance report that works best for you. In this case, we'll use the Requirement Report, which lists trainees and the courses that are overdue.

Click the Reports tab and select 'Requirement Report' from the list.

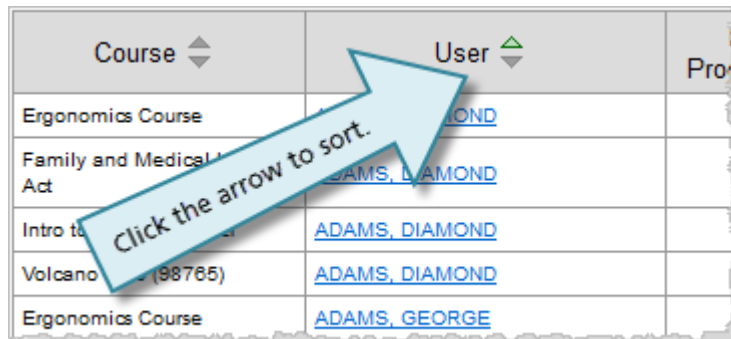
Select 'Courses' in step 1.

Now select the user fields to display on the report.

In step 3, select 'Non-compliant', as we want to see who has not completed assigned training so we can follow up with them.

Select any additional fields you want to display on the final report and click 'Run Report'.

Sort the report by user, so the information will be grouped by trainee.



Course ▾	User ▾	Pro
Ergonomics Course	<a href="#">ADAMS, DIAMOND</a>	
Family and Medical Act	<a href="#">ADAMS, DIAMOND</a>	
Intro to	<a href="#">ADAMS, DIAMOND</a>	
Volcano (98765)	<a href="#">ADAMS, DIAMOND</a>	
Ergonomics Course	<a href="#">ADAMS, GEORGE</a>	

Save the report as a template. Click the button in the top right corner of the report.

The report will be run at the interval you select: daily, weekly, monthly, etc. You can have the report emailed to you every time it's run.

## \* Note

If you select 'assigned' curriculums, courses, or user groupings when you are creating a manager account, please look at the bottom of the screen to see what is currently assigned to the manager.

This list shows what curriculums, courses and user groupings the manager can control. Click the 'Modify' button to add or change the listing.

The screenshot displays the user management interface. At the top, it shows registration and login information: Registration Date: Jan 9, 2007 8:56 AM ET; Last Login: Jan 15, 2007 1:36 PM ET (65.96.164.240); Last Update: Jan 15, 2007 1:36 PM ET. Below this is a table with four rows, each representing a different assignment category. Each row has a 'MODIFY' button on the right. A red arrow points from the text above to the top of the table. An orange callout box with a red arrow points to the 'MODIFY' buttons, containing the text: 'Click the appropriate 'Modify' button to add or change assignments.'

Modify User		Cancel
Assigned Curriculums for Training	NONE	MODIFY
Registered Classroom Courses	NONE	MODIFY
User Grouping Contact Assignments	NONE	MODIFY
User Files	NONE	MODIFY

In this example, the manager has nothing assigned. This means s/he will not be able to manage any curriculums, courses or user groupings. Click the 'Modify' button to modify the assignments.



## **4** Monitor Progress

Now that you've setup your metrics, you can easily monitor new user accounts and compliance.

Check your email for the automated report output to see what tasks need to be done to maintain your TrainCaster environment.