

etrainu

ADMINISTRATOR USER GUIDE

Contents Page

ADMINISTRATOR USER GUIDE	1
Introduction	4
Overview of the LMS	5
System Hierarchy	6
Logging into your Account	7
Managing your Personal Details	7
Switching between your Accounts	8
Document Library	9
Managing the System Hierarchy	10
Obtaining a Groupid for a Department	12
Obtaining a Suborgid (Also known as a Group ID for a Sub-organisation)	12
Creating an Org Administrator Account	13
Creating a Department Administrator Account from an Org Administrator account	13
Creating a Sub-organisation Administrator Account from an Org Administrator account	14
Bulk Admin Job	15
Bulk Admin Job - Admin Import	15
Bulk Admin Job - Course Delete	16
Bulk Admin Job - Course Enrol	18
Bulk Admin Job - Course Expire	20
Bulk Admin Job - Course History	21
Bulk Admin Job - Create Sub Org	23
Bulk Admin Job - Merge Training	25
Bulk Admin Job - Sub Org Move	26
Bulk Admin Job - User Archive	28
Bulk Admin Job - User Import	30
Creating a Participant Account	32
Creating a Linked Account	33
Creating a coupon code	35
Managing Participants - Overview	37
Edit Participant Account	40
Archive Participant Account	41
Add Notes to a Participant	41
Upload a Document to a Participant Account	42
Upload a User Record to a Participant Account	43
Sending an Email to a Participant	43
Check Participant Training Progress	44
Printing a Participant's Certificate	45
Assign Training - Individual	46
Assign Training - In Bulk	48
Viewing Reports	51
Bulk Course Distribution Report	52
Training Status Report	53

Training Status Report - BETA	55
Training Groups	59
User Log Report	61
CPD Report	62
Event Enrolment Report	63
Assessment Notes Report	64
Training Event Summary Report	65
Active User Report	67
Course Purchase Report	68
Participant Groups	70
Setting default sub org for new users	72
FAQs and Support	75
The etrainu Support Centre	75
Contact Us	75

Introduction

Welcome to the etrainu e-Learning Learning Management System (LMS). Our LMS is designed to cater for your every training need and boasts a number of features including course completion, assessor lead or self-marking assessments, practical face-to-face assessment capability and more. Our LMS is also designed to provide you with the ability to self-manage the majority of your own platform and give you full visibility into your staff or member training.

Our LMS is accessible 24/7 from anywhere in the world, and our Help Desk Support Team is readily available to assist you as needed.

Here at etrainu, we offer a range of both accredited and non-accredited training across a vast number of industry sectors. These include hospitality and tourism, disability services, mining and construction, sporting, health and wellbeing, business and more being added daily! To view the full range of courses available, visit www.etrainu.com.

This User Guide is designed to help you navigate through the LMS, understand the functions within your Administrator access, and confidently manage your training needs.

Happy learning!

Overview of the LMS

When you log into the LMS for the first time, you will notice there is so much to choose from! Below is a short overview of the different functions you may have access to.

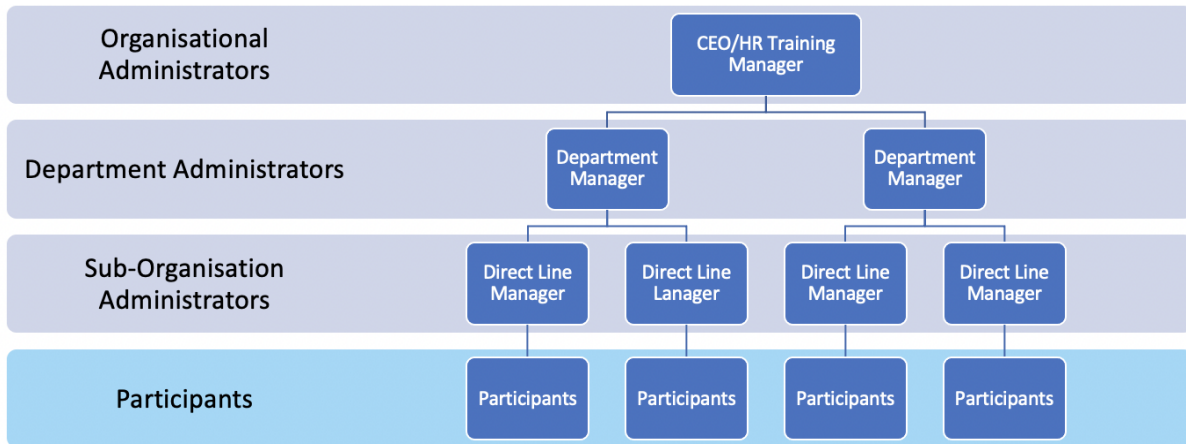
The screenshot shows the etrainu LMS administrator interface. At the top left is the 'etrainu' logo. A navigation menu is located at the top right, with items: Home, Administration, Participants, Training, Reports, Help, and Account. Numbered callouts (1-7) are placed over these menu items. The main content area displays a 'Welcome Admin' message. Below the welcome message, there are sections for 'LMS Level: Organisation', 'Welcome to your Online training!', 'Some of the areas we specialise in are:', 'Training Available', 'My Training', 'My Account Details', and 'Contact etrainu'. At the bottom of the page, there is a black bar with the text 'Powered by etrainu'.

1. **Home:** This will bring you back to the LMS home page.
2. **Administration:** This allows you to edit/update your hierarchy structure.
3. **Participants:** This allows you to group and manage participant accounts.
4. **Training:** This allows you to not only view the training library but will allow you to allocate training to participants within the LMS.
5. **Reports:** This menu item showcases our reporting menu and reporting functions.
6. **Help:** This section will take you to our Support Centre and Help Desk. If you have a question, you can use this to browse a range of articles and videos to help you troubleshoot, or raise a ticket with our Help Desk team.
7. **Account:** This section allows you to edit your notifications or switch between multiple accounts at any time.

System Hierarchy

The etrainu LMS gives you the ability to create your personalised hierarchy in accordance with your organisation structure and reporting requirements. Our hierarchy functionality allows you to personalize a three-layer administration hierarchy approach.

We refer to these layers as organisation, department, and sub-organisation. You can add and change departments/sub-organisations at any time, and even though you are restricted to the three layers vertically, you can build as many Departments/Sub-organisations horizontally as you require.



Each layer of management can oversee all layers below; however, not any layers above nor any layers beside. Please see below a brief overview of each administration access type.

Organisation: This administrator has full access to the entire organisation.

Department: This administrator has full access to their Department and the Sub-organisations within it.

Sub-Organisation: This administration only has access to their Sub-organisation.

etrainu works across a range of sectors and organisation types when building your system hierarchy.

Logging into your Account

Your organisation will have a unique URL to access your etrainu LMS platform. Typically, this URL is usually organisationname.etrainu.com/training. If you do not know your URL, please contact your Manager or helpdesk@etrainu.com.

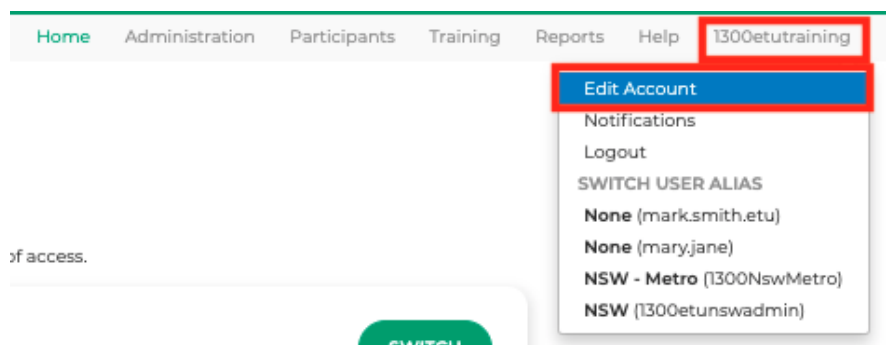
1. When you reach the login page, enter your login credentials and click “Log in”.
2. If you are unsure of your credentials, please check your inbox, including spam folders or contact your system administrator.



Managing your Personal Details

It is important to keep your information up-to-date at all times while you are using the platform.

1. Click on “Edit Account” on the top right of the screen.



2. Make the required adjustments to your account information and click “Save”.

Edit Account Information

Edit Account Information for *Mary Jane*

You will need a valid email address in order to receive notification messages from etrainu.
Please add etrainu.com to your email safe list so that these messages are not marked as spam.

Account Information

Username *
mary.jane
Enter a unique username

[RESET PASSWORD](#)

Contact Information

Email *
admin@etrainu.com
Enter a valid email address

Please double check that this address is correct and working. This email address needs to be your own email address so that etrainu can contact you if you require assistance.

Please provide the physical address (street number and name NOT post office box) where you usually reside rather than any temporary address at which you reside for training, work or other purposes before returning to your home. If you are from a rural area use the address from your state's or territory's 'rural property addressing' or 'numbering' system as your residential street address.

Building/Property Name
Building Name

Street Number
(e.g. 205 or Lot 118)

Suburb
Suburb

Country
Australia

Postcode
1234

Flat/Unit Details
level 3

Street Name
Street Name

State
Queensland

Phone Number
1712345678
Please include the country code if you do not reside in Australia. This phone number needs to be your own so that etrainu can contact you if you require assistance.

[CANCEL](#) [SAVE](#)

Switching between your Accounts

You are able to switch between multiple accounts from your administrator account. There are two ways you can switch between accounts.

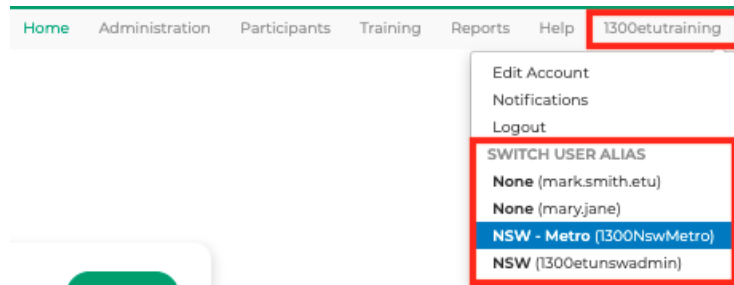
1. Click on the “Switch” button for the account you would like to switch into from the home page.

The screenshot shows the etrainu administrator interface. At the top, there is a navigation bar with the etrainu logo and links for Home, Administration, Participants, Training, Reports, Help, and 1300etraining. Below this is a 'Welcome Admin' section with the text 'LMS Level: Organisation'. A message states: 'This account allows you to manage the etrainu - Training Organisation. You also have the following linked accounts which you can switch between to give you a different level of access.' Below this message is a table of linked accounts:

<ul style="list-style-type: none"> Department: NSW (1300etrainingadmin) Sub-Organisation: NSW - Metro (1300NewMetro) 	<div style="border: 2px solid red; padding: 5px;"> <p>SWITCH</p> <p>SWITCH</p> <p>SWITCH</p> <p>SWITCH</p> </div>
Participant: (mark.amithatu)	
Participant: (mary.jane)	

Below the table, there is a 'Welcome to your Online training!' section with instructions on how to use the system, including links to 'Training Library' and 'My Training'.

- Click on your username in the menu bar on the top right and select the account you would like to switch into.

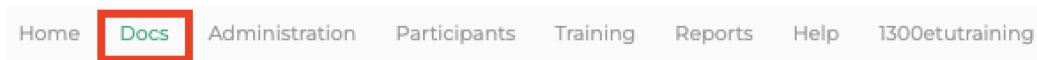


Note: You can switch back into any account when you have logged in

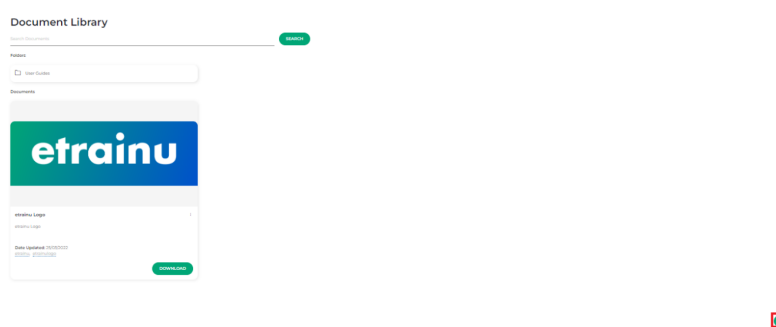
Document Library

You are able to add documents from your administrator account for your participant's to view.

- Click on "Docs".



- Click on the + icon at the bottom right of the screen.



- Complete the fields and upload a document and thumbnail and click "Save".

Document Upload

File Details

Name*

Description*
A short description of what this document is for.

Tags
Use a , to separate tags.

Visible to whole organization
Makes this file visible to administrators, assessors and participants in child departments/sub-organizations.

Document / image No file chosen.
Select and image or Document to upload.

OR

Video URL
Enter a URL for a video (Youtube only).

OR

Web Link
Enter an arbitrary Web Link.

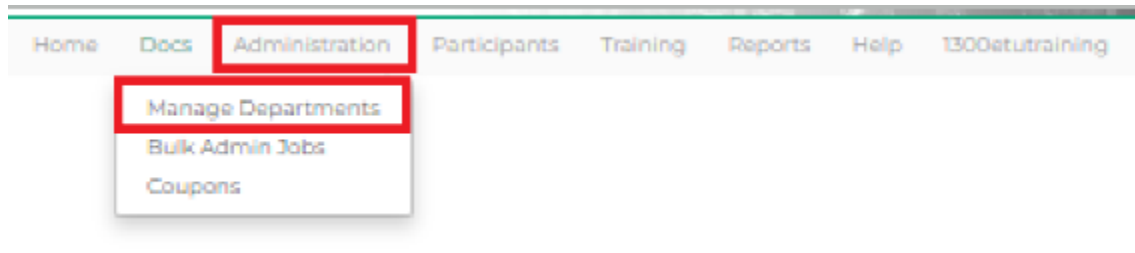
Thumbnail No file chosen.
An image to display which illustrates the content of your file. The thumbnail should be 640x360 or larger and not exceed 1mb.

Folder

Managing the System Hierarchy

You have the ability to update your system hierarchy at any time. To do this, you must be signed in as an “Organisation Administrator”.

1. Click on “Administration”, then select “Manage Departments”.

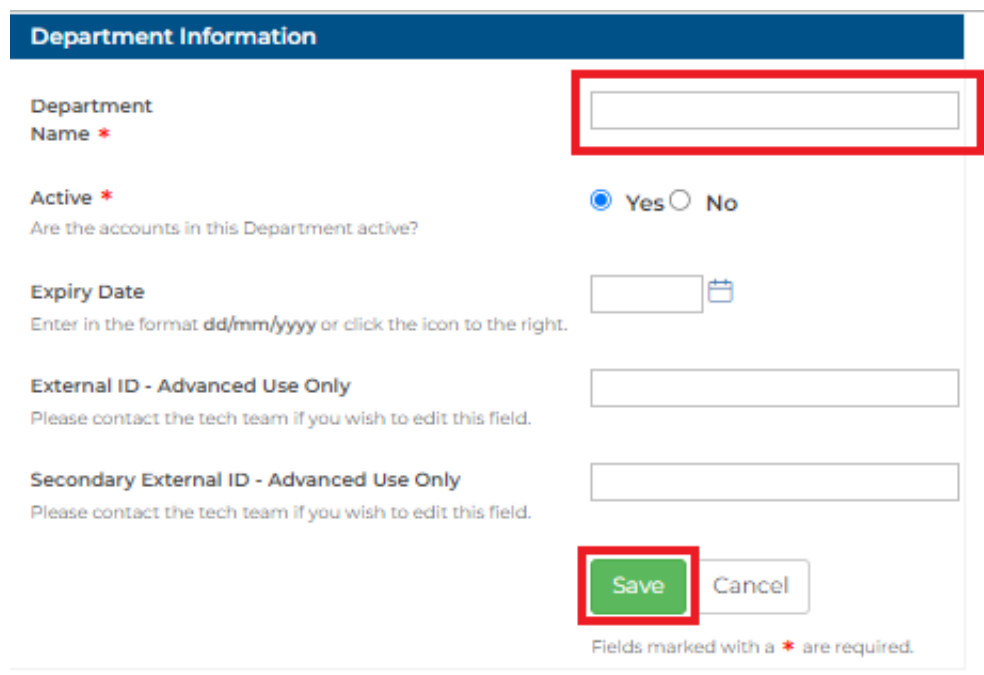


2. Click on “Add a New Department”.



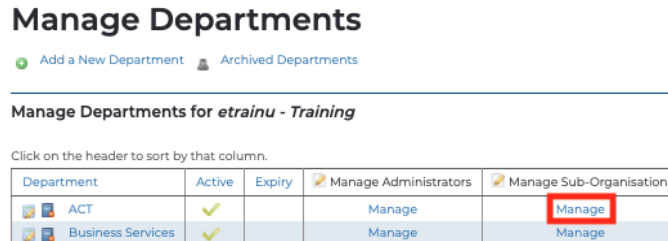
3. Enter in the department name and click “Save”.

We recommend that you do not put an expiry date on the department as this will lock out any users within that department on the date of expiry.

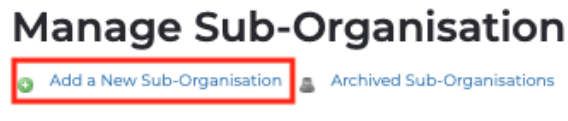
A screenshot of the 'Department Information' form. The form has a blue header with the title 'Department Information'. Below the header, there are several fields: 'Department Name *' (a text input field highlighted with a red box), 'Active *' (radio buttons for 'Yes' and 'No', with 'Yes' selected), 'Expiry Date' (a date input field with a calendar icon), 'External ID - Advanced Use Only' (a text input field), and 'Secondary External ID - Advanced Use Only' (a text input field). At the bottom of the form, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons, there is a note: 'Fields marked with a * are required.'

Once the department has been created, you must create the sub-organisation/s to sit within it. To do this, follow the instructions outlined below.

4. In the same “Manage Departments” screen, locate the department you wish to create a sub-organisation for and click on “Manage” under the “Manage Sub-Organisations” column.



5. Click on “Add a New Sub-Organisation”.



6. Enter in the sub-organisation name and click “Save”.

We recommend that you do not put an expiry date on the department as this will lock out any users within that department on the date of expiry.

Sub-Organisation Information

Sub-Organisation Name *

Active * Yes No
Are the accounts in this Sub-Organisation active?

Expiry Date
Enter in the format dd/mm/yyyy or click the icon to the right.

External ID - Advanced Use Only
Please contact the tech team if you wish to edit this field.

Secondary External ID - Advanced Use Only
Please contact the tech team if you wish to edit this field.

Fields marked with a * are required.

Obtaining a Groupid for a Department

1. To obtain a GroupID click on the Department (in blue once saved).

Manage Departments

[+ Add a New Department](#) [Archived Departments](#)

Manage Departments for *etrainu - Training*

Click on the header to sort by that column.

Department	Active	Expiry	Manage Administrators	Manage Sub-Organisation
ACT	✓		Manage	Manage

2. In the address bar (URL) copy the GroupID.

etutaining.etrainu.com/training/index.cfm?event=mng.org-departments.view&groupID=59452&parentGroup=55337

Note: The Groupid is used for admin imports in the system.

Obtaining a Suborgid (Also known as a Group ID for a Sub-organisation)

1. To obtain a suborgid click on the suborg (in blue once saved).

Manage Sub-Organisations for *QLD*

Click on the header to sort by that column.

Sub-Organisation	Active	Expiry	Manage Sub-Organisation Administrators
Brisbane Metro	✓		Manage
Regional QLD	✓		Manage

2. In the address bar (URL) copy the GroupID.

etutaining.etrainu.com/training/index.cfm?event=mng.sub-organisations.view&groupID=55339&parentGr...

Note: The Suborgid is used for user imports in the system.

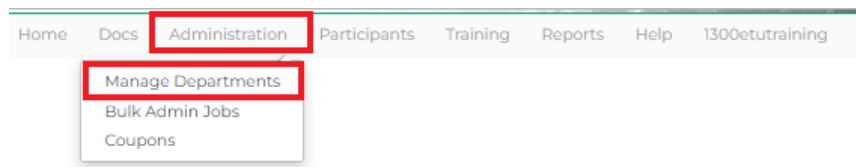
Creating an Org Administrator Account

If you would like an Org Administrator account created please email helpdesk@etrainu.com.

Creating a Department Administrator Account from an Org Administrator account

Please ensure that you are logged into your organisation administrator account.

1. Click on “Administration”, then select “Manage Departments”.



2. Find the Department and click “Manage” under “Manage Administrators”.

Manage Departments

[Add a New Department](#) [Archived Departments](#)

Manage Departments for eTrainU - Training

Click on the header to sort by that column.

Department	Active	Expiry	Manage Administrators	Manage Sub-Organisation
ACT	✓		Manage	Manage
Business Services	✓		Manage	Manage

3. Complete the account creation for your Department Administrator and press “save”.

Manage Administrators
Edit an Existing Department Administrator for NSW

Account Information

Username*
1300etruad@etrainu.com
Enter a unique username [RESET PASSWORD](#) [SEND PASSWORD RESET EMAIL](#)

Personal Information

Title: Mr. Admin

First Name*
Admin

Middle Name:
Middle Name

Last Name*
New

Gender:
 Male
 Female
 Other

Date of Birth:
01/07/1980
Enter in the format dd/mm/yyyy

Contact Information

Email*
admin@etrainu.com
Enter a valid email address

Please double check that this address is correct and working. This email address needs to be your own email address so that eTrainU can contact you if you require assistance.

Please provide the physical address (street number and name NOT post office box) where you usually reside rather than any temporary address at which you reside for training, work or other purposes before returning to your home. If you are from a rural area use the address from your state's or territory's local property addressing or numbering system as your residential street address.

Building/Property Name: Building Name, Unit Number

Street Number: Street Name, (eg. 205 or 145 Bldg), Street Name

Suburb: Suburb

Country: Australia, State: New South Wales

Postcode: 1534, Phone Number: 0723242076

Please include the country code if the user does not reside in Australia.

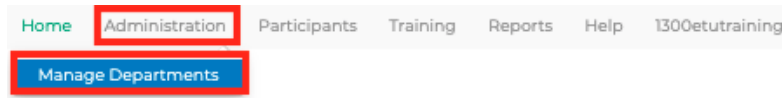
[CANCEL](#) [SAVE](#)

Note: When creating admin accounts, users should include identifiers like ".admin" since usernames are unique identifiers and cannot be used twice. Additionally, administrators can only be created for levels subordinate to their own and only those with organisation administrator access can create this. Once you have created the account, you can link this account to their participant account.

Creating a Sub-organisation Administrator Account from an Org Administrator account

Please ensure that you are logged into your organisation Administrator account.

1. Click on “Administration”, then select “Managed Departments”.



2. Find the Department and click “Manage” under “Manage Sub-organisation”.

Manage Departments

[Add a New Department](#) [Archived Departments](#)

Manage Departments for etrainu - Training

Click on the header to sort by that column.

Department	Active	Expiry	Manage Administrators	Manage Sub-Organisation
ACT	<input checked="" type="checkbox"/>		Manage	Manage
Business Services	<input checked="" type="checkbox"/>		Manage	Manage

3. Find the Sub-organisation and click “Manage” under “Manage Sub-organisation Administrators”.

Manage Sub-Organisation

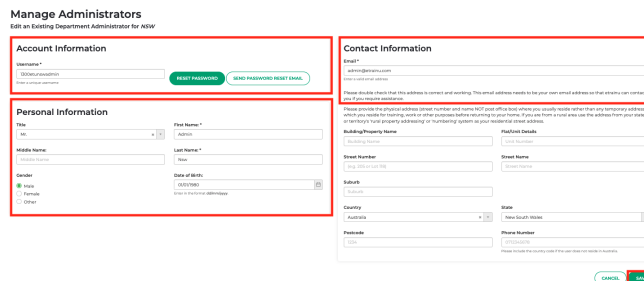
[Add a New Sub-Organisation](#) [Archived Sub-Organisations](#)

Manage Sub-Organisations for NSW

Click on the header to sort by that column.

Sub-Organisation	Active	Expiry	Manage Sub-Organisation Administrators
NSW - Metro	<input checked="" type="checkbox"/>		Manage
NSW - Regional	<input checked="" type="checkbox"/>		Manage

4. Complete the account creation for your Department Administrator and press “save”.



The screenshot shows the 'Manage Administrators' form for a user named 'admin'. The form is divided into three main sections, each highlighted with a red box:

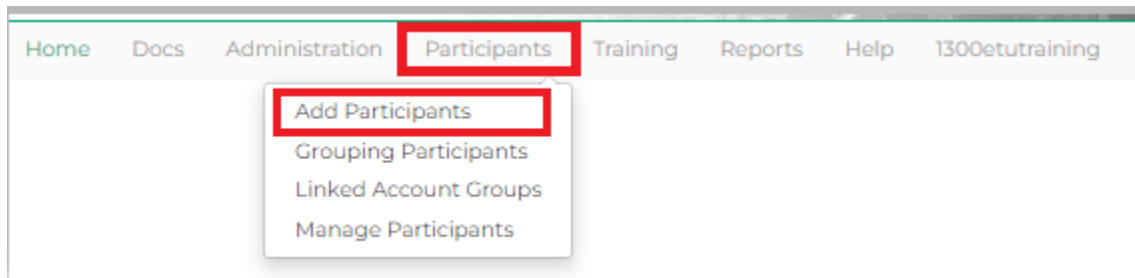
- Account Information:** Includes fields for Username (admin), Password, and Confirm Password.
- Personal Information:** Includes fields for First Name (admin), Last Name, Address, Date of Birth, and Gender (Male).
- Contact Information:** Includes fields for Email, Building/Property Name, Street Number, Street Name, Suburb, State, Postcode, and Phone Number.

Note: When creating admin accounts, users should include identifiers like ".admin" since usernames are unique identifiers and cannot be used twice. Additionally, administrators can only be created for levels subordinate to their own and only those with organisation administrator access can create th

Creating a Participant Account

To give someone access to the LMS, you must create them a participant account. Having a participant account allows the participant full access to complete training available to them within the LMS.

1. Click on “Participants”, followed by “Add a New Participant”.



2. Fill in the Manage Participants screen to create a participant account. Please note you will need to enter at minimum all mandatory information marked with an asterix *.

Username: We suggest keeping this unique to your organisation.
Example: Firstname.Lastname.orgname

Password: When creating the password it must be between 8 and 50 characters and contain at least 3 of the following: English upper case; English lower case; Numeric characters (0 through 9); Non-alphabetic printable characters
Example: eTrainu!2022

When creating the account, when selecting the “Department” and “Sub-Organisation”, note this is where the participant’s account will sit in relation to the system hierarchy reviewed earlier in this guide.

Email: Please keep this unique to each participant. Any emails sent from the etrainu LMS will be sent to this email address. This includes the account creation details.

Manage Participants

Add a New Participant

Account Information

Username *
Jessica.Lee@etu
Enter a unique username

Password *
[password field]
Very Strong
Passwords must be between 8 and 50 characters and contain at least 3 of the following: English upper case, English lower case, numeric characters (2 through 9), non-alphabetic printable characters

Create In

Department *
QLD

Sub-Organisation *
Brisbane Metro
This is the sub-organisation under which the participant will be created.

Participant Group
Select Group

Personal Information

Title
Title

First Name *
Jessica

Middle Name:
Middle Name

Last Name *
Lee

Gender
 Male
 Female
 Other

Date of Birth:

Enter in the format dd/mm/yyyy

Contact Information

Email *
helpdesk@etrainu.com
Enter a valid email address

Please double check that this address is correct and working. This email address needs to be your own email address so that etrainu can contact you if you require assistance.

Please provide the physical address (street number and name NOT post office box) where you usually reside rather than any temporary address at which you reside for training, work or other purposes before returning to your home. If you are from a rural area use the address from your states or territory's rural property addressing or 'numbering' system as your residential street address.

Building/Property Name
Building Name

Flat/Unit Details
Unit Number

Street Number
(e.g. 205 or Lot 118)

Street Name
Street Name

Suburb
Suburb

Country
Country

State
State

Postcode
1234

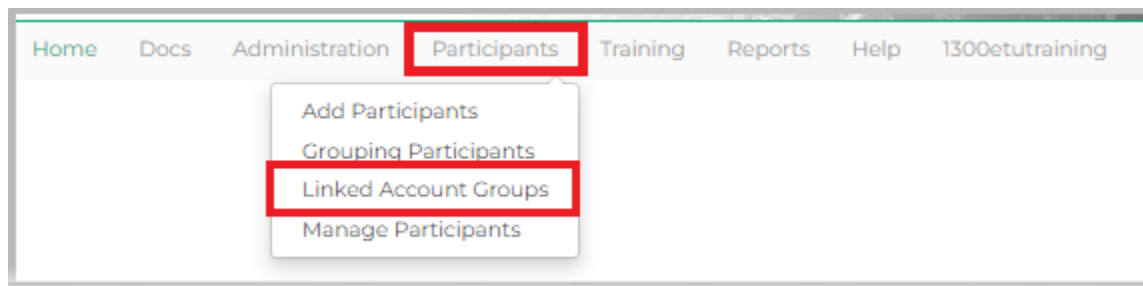
Phone Number
0712345678
Please include the country code if the user does not reside in Australia.

Creating a Linked Account

A linked account group allows someone with multiple accounts types to switch between these without having to log out and log in each time they need to move between them. Typical switch links will include Participant, Administrator, Supplier (Training Admin) or Assessor.

To find out more about Assessor and assessor sections in the platform, please refer to the Supplier /Assessor User Guide.

1. Click on "Participants", then select "Linked Account Groups".



2. When the next page opens, click "Add New". Search for the account in the "Search By Account Name" to ensure one has not been created already. We suggest to search by the participant account username. If nothing comes up click "Add new".

Manage Linked Account Groups

Search by Account Group Name:

- Enter either the First Name or Last name of the user or their username and click “Search”.

Find Accounts to Add

Name ⓘ

Search

First Name	Last Name	Username	Email	Org Name	Role	Actions
Search for an account to add to the linked account group.						

- Find the accounts to link and click on the +.

First Name ↑	Last Name ↑	Username ↑	Email ↑	Org Name ↑	Role ↑	Actions
Admin	Nsw	1300etunswadmin	admin@etrainu.com	NSW View Path	Department Admin	+

- When you have added all of the accounts required click “Done”.

Edit Linked Account Group

Linked Accounts

First Name	Last Name	Username	Org Name	Role	Actions
Admin	Etrainu	1300etutrainu	etrainu - Training	Org Admin	<input checked="" type="checkbox"/> <input type="checkbox"/>
Admin	Nsw Metro	1300NswMetro	NSW - Metro	Sub-org Admin	<input checked="" type="checkbox"/> <input type="checkbox"/>
Mary	Jane	maryjane	Brisbane Metro Participants	Participant	<input checked="" type="checkbox"/> <input type="checkbox"/>
Mark	Smith	mark.smith.etu	NSW - Metro Participants	Participant	<input checked="" type="checkbox"/> <input type="checkbox"/>
Admin	Nsw	1300etunswadmin	NSW	Department Admin	<input checked="" type="checkbox"/> <input type="checkbox"/>

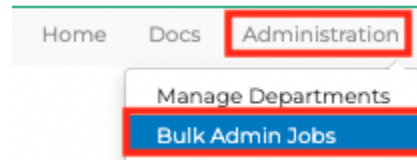
Done

Note: We suggest searching for a linked account first before clicking “Add New” as the other account/s may not appear.

Bulk Admin Job

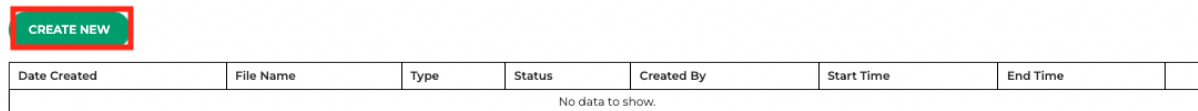
Bulk admin jobs can only be managed from an Organisation Level Administrator account.

1. For all new admin jobs please click on “Administration”, then select “Bulk Admin Jobs”.



2. Then click on “Create New”.

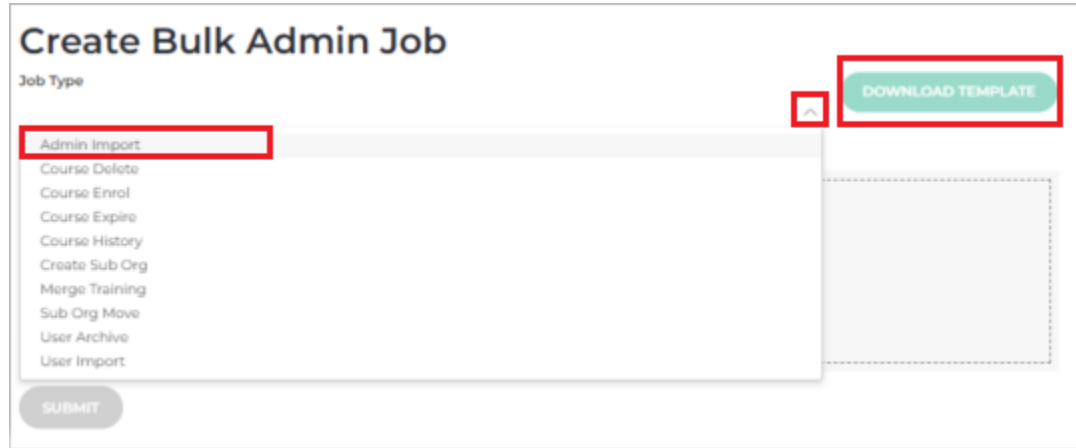
Bulk Admin Jobs



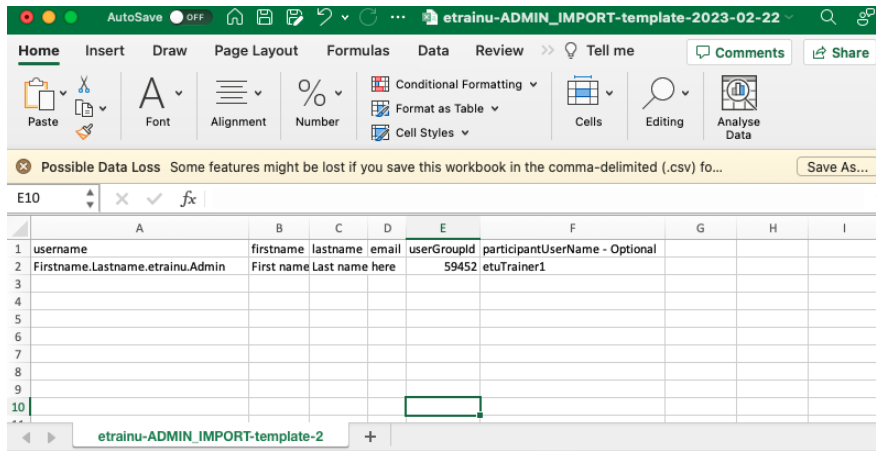
Bulk Admin Job - Admin Import

To create additional admin accounts for your organisation into one follow the steps below:

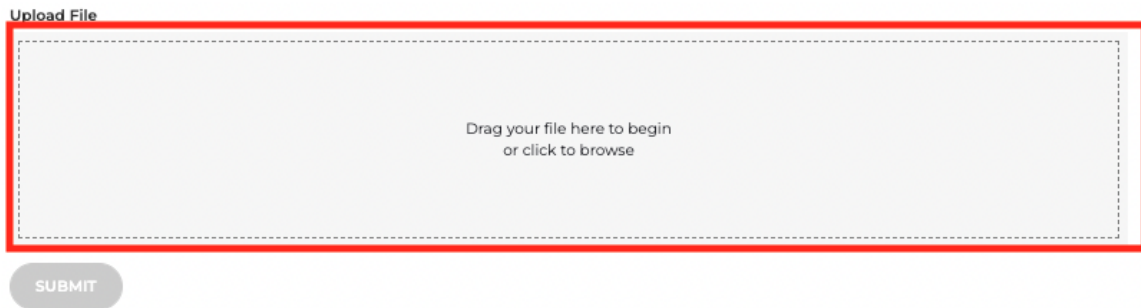
1. Click the arrow and select “Admin Import” then select “Download Template”.



2. When you open the template enter the details for the admin accounts:
Username (Create a unique username. For example: Firstname.Lastname.Oraname.Admin)
First Name, Last Name, Email, User Group Id ([click here](#) to learn how to obtain this for a Department Administrator account. For Sub-organisation Administrator accounts [click here](#)).
Participant Username - Optional (We suggest to advise the participant username here so it creates a switch account for the user).



3. Save your CSV and upload or drag it into the box below.



4. When it has been uploaded click “Submit”.

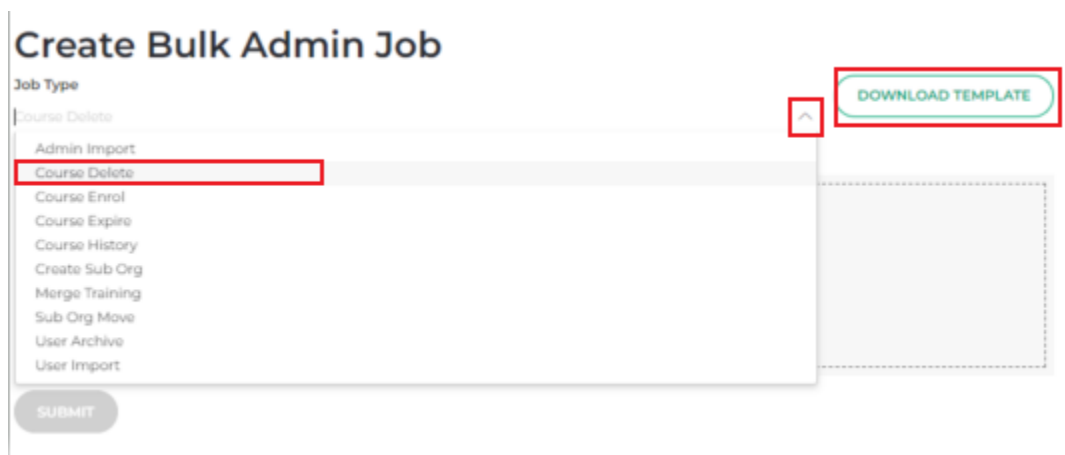
Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

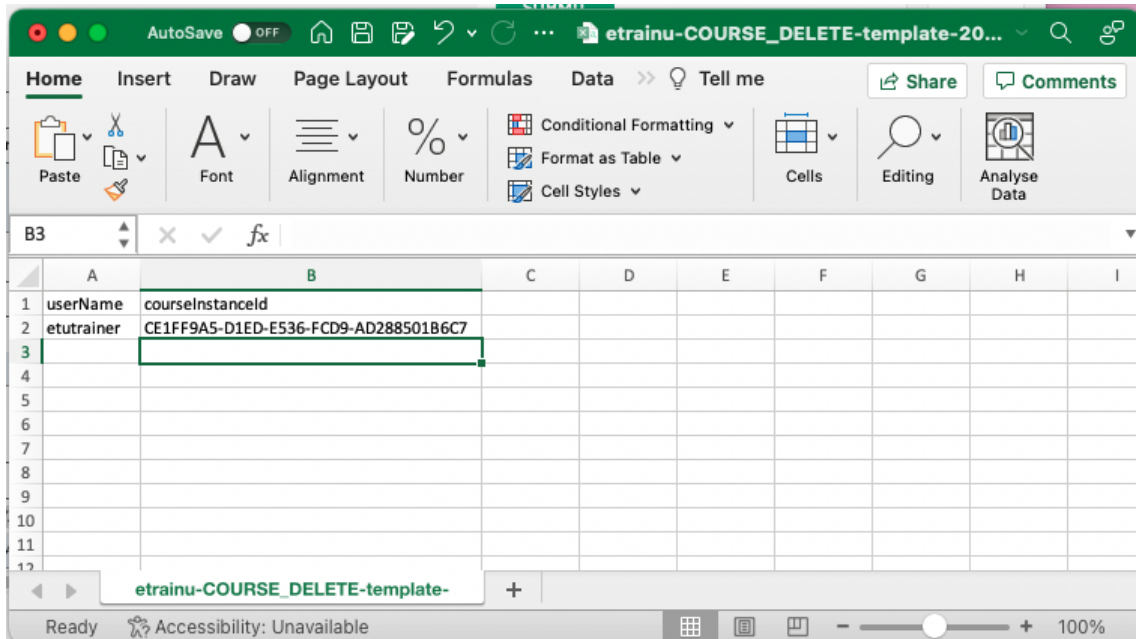
Bulk Admin Job - Course Delete

To delete courses from users in your organisation follow the steps below:

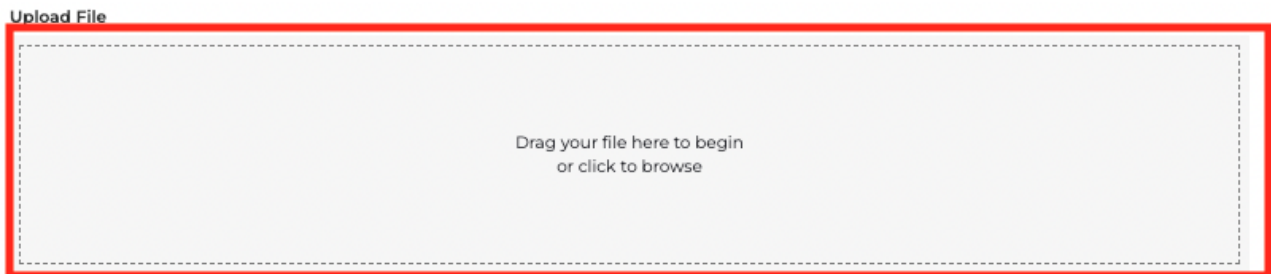
1. Click the arrow and select “Course Delete” then select “Download Template”.



- When you open the template enter the username of the account and enter the “courseInstanceld”. This can be found when you obtain a [Training Status Report](#) (under “Extra Display Fields”).



- Save your CSV and upload or drag it into the box below.






- When it has been uploaded click “Submit”.



- The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
20/12/2022 13:06:36	etrainu-COURSE_DELETE-template-2022-12-20.csv	Course Delete	Queued	Admin Etrainu			View Details
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

Status Legend

-  - When queued, the job is being processed.
-  - When green, the job has been completed successfully with no errors.
-  - When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

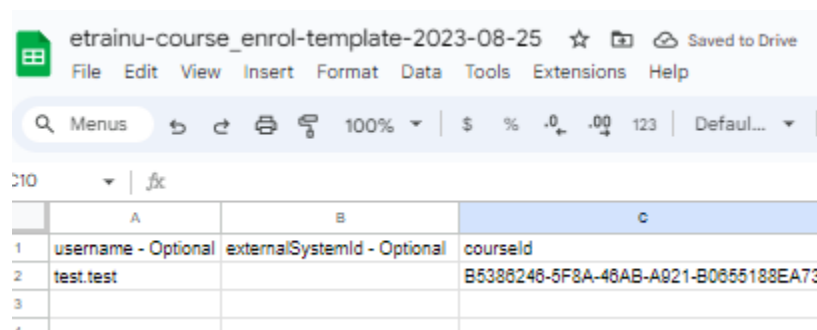
Bulk Admin Job - Course Enrol

To enrol courses into your organisation follow the steps below:

1. Click the arrow and select “Course Enrol” then select “Download Template”.

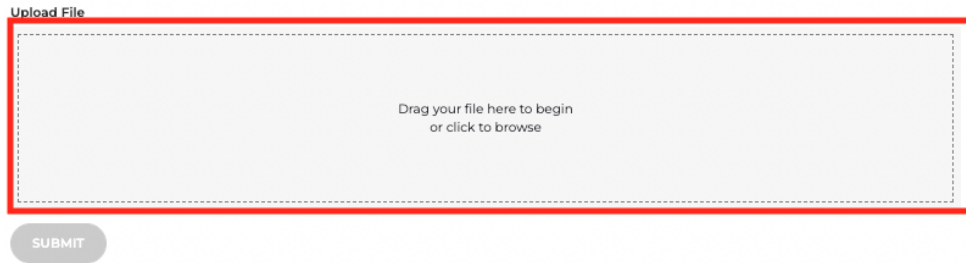


2. When you open the template enter the username of the account or the external ID for those with integration, and the “**courseid**” (To find the correct course ID, click on this [link](#), which will direct you to the relevant resource.



	A	B	C
1	username - Optional	externalSystemId - Optional	courseid
2	test.test		B5386246-5F8A-48AB-A921-B0655188EA73
3			
4			

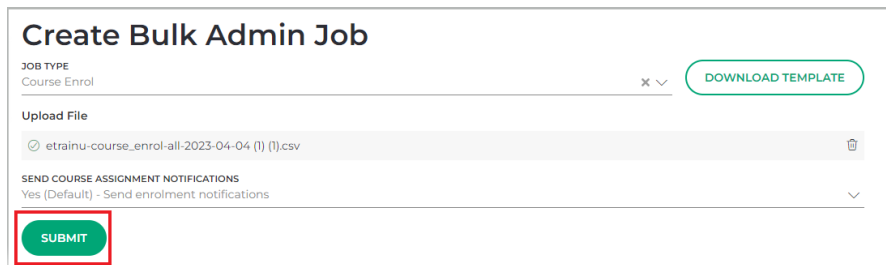
3. Save your CSV and upload or drag it into the box below.



4. Enrolment notifications will be automatically sent out by default once the job has been submitted, unless administrators choose no.

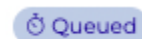


5. Once done, click on Submit.



6. The job will then process.

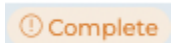
Status Legend



- When queued, the job is being processed.



- When green, the job has been completed successfully with no errors.



- When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

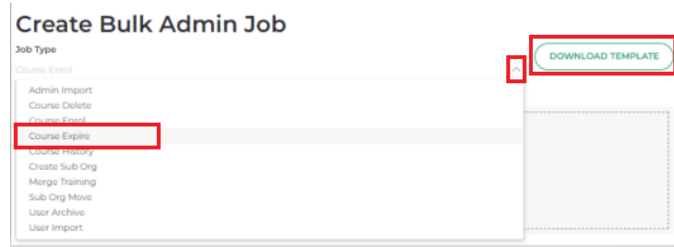
Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

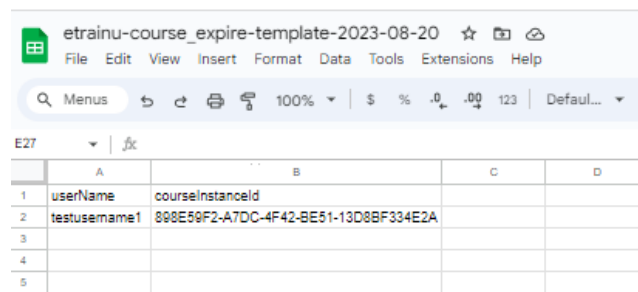
Bulk Admin Job - Course Expire

To expire the course and associated module data for the specified username and course, follow the steps below:

1. Click the arrow and select “Course Expire” then select “Download Template”.

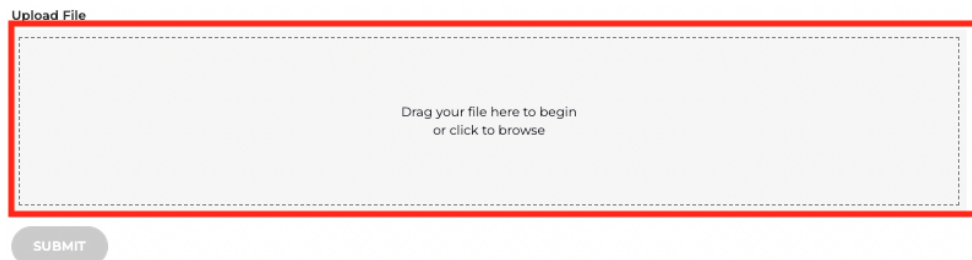


2. When you open the template enter the username of the account, enter the “courseInstancelId”. This can be found when you obtain a [Training Status Report](#) (under “Extra Display Fields”).



	A	B	C	D
1	userName	courseInstancelId		
2	testusername1	898E59F2-A7DC-4F42-8E51-13D8BF334E2A		
3				
4				
5				

3. Save your CSV and upload or drag it into the box below.

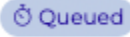




4. Once done, click on Submit.



- The job will then process.

Status Legend

-  - When queued, the job is being processed.
-  - When green, the job has been completed successfully with no errors.
-  - When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- The course doesn't need to have an expiry set in the etrainu LMS, this just forces it into an expired state regardless of the status.
- Each template can only have a maximum of 1000 rows.

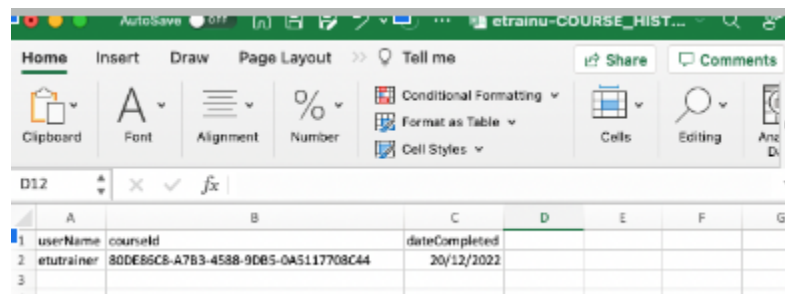
Bulk Admin Job - Course History

To import courses into your organisation follow the steps below:

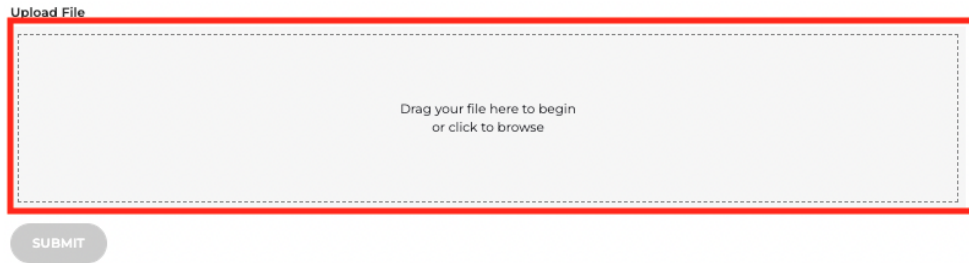
- Click the arrow and select “Course History” then select “Download Template”.



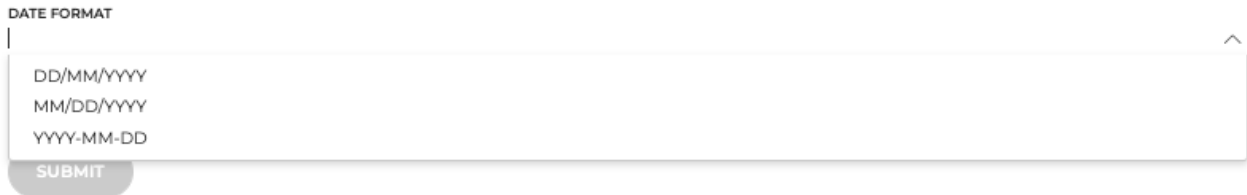
- When you open the template enter the username of the account, enter the “courseInstancelid”. This can be found when you obtain a [Training Status Report](#) (under “Extra Display Fields”).



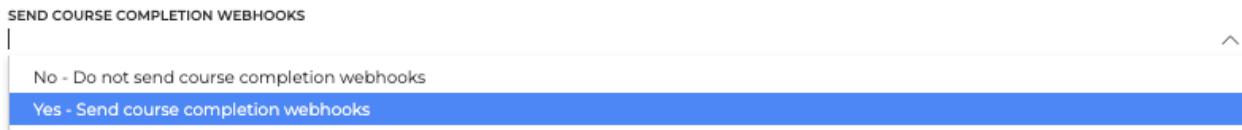
3. Save your CSV and upload or drag it into the box below.



4. Select the Date Format (as entered on your CSV).



5. Under “Send Course Completion Webhooks” advise if you want these to be sent.



Note: Yes - If you have an integration; No - if no integration.

6. When it has been uploaded click “Submit”.

Create Bulk Admin Job




7. The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
20/12/2022 13:22:46	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	Queued	Admin Etrainu			View Details
20/12/2022 13:21:35	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	Complete	Admin Etrainu	20/12/2022 13:22:00	20/12/2022 13:22:00	View Details
20/12/2022 13:06:36	etrainu-COURSE_DELETE-template-2022-12-20.csv	Course Delete	Complete	Admin Etrainu	20/12/2022 13:07:00	20/12/2022 13:07:00	View Details
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

Status Legend

 Queued

- When queued, the job is being processed.

 Complete

- When green, the job has been completed successfully with no errors.

 Complete

- When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

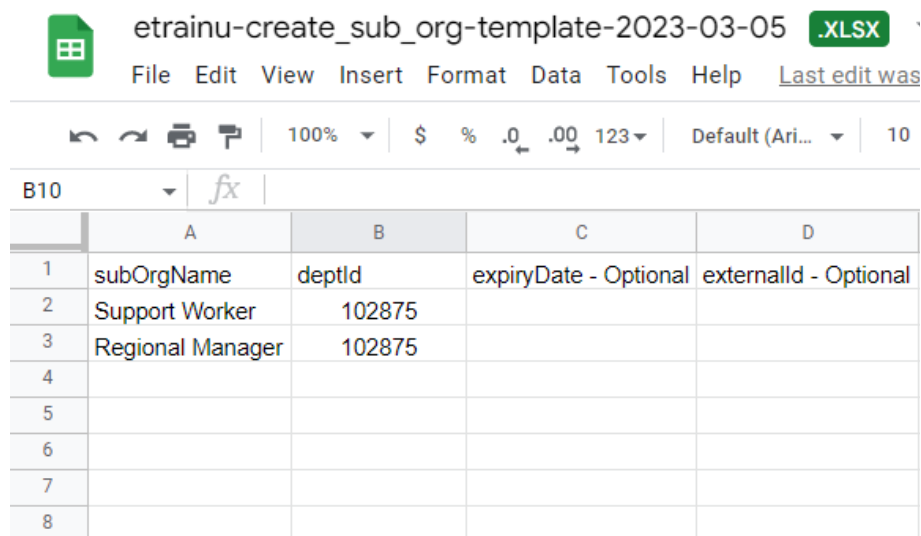
Bulk Admin Job - Create Sub Org

To create new Sub Orgs follow the steps below:

1. Click the arrow and select “Create Sub Org” then select “Download Template”.



2. When you open the template enter the Sub Org Name and Department ID ([click here](#) to learn how to obtain this). The other fields (expiryDate and externalId) are optional.



	A	B	C	D
1	subOrgName	deptId	expiryDate - Optional	externalId - Optional
2	Support Worker	102875		
3	Regional Manager	102875		
4				
5				
6				
7				
8				

3. Save your CSV and upload or drag it into the box below.

Create Bulk Admin Job

JOB TYPE
Create Sub Org x v DOWNLOAD TEMPLATE

Upload File

Drag your file here to begin or click to browse

EXPIRY DATE FORMAT v

SUBMIT

4. When it has been uploaded click “Submit”.

Create Bulk Admin Job

JOB TYPE
Create Sub Org x v DOWNLOAD TEMPLATE

Upload File

etrainu-create_sub_org-template-2023-03-05.csv

EXPIRY DATE FORMAT v

SUBMIT

The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

Status Legend

- Queued - When queued, the job is being processed.
- Complete - When green, the job has been completed successfully with no errors.
- Complete - When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.
- If you have an integration please contact your Customer Success Manager as we do not recommend using this feature.

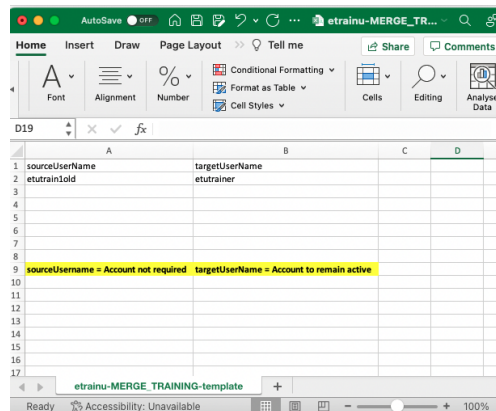
Bulk Admin Job - Merge Training

To merge duplicate accounts in your organisation into one follow the steps below:

1. Click the arrow and select “Merge Training” then select “Download Template”.



2. When you open the template enter the username of the account to be archived (not required) under “**sourceUserName**” and put the username of the account to be kept under “**targetUserName**”.



3. Save your CSV and upload or drag it into the box below.

Create Bulk Admin Job

JOB TYPE
Merge training

DOWNLOAD TEMPLATE

Upload File

Drag your file here to begin
or click to browse

SUBMIT

4. When it has been uploaded click “Submit”.

Create Bulk Admin Job

JOB TYPE
Merge training x v DOWNLOAD TEMPLATE

Upload File
etrainu-MERGE_TRAINING-template-2022-12-20.csv 🗑️

SUBMIT

The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	🟢 Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

Status Legend

- 🟡 Queued - When queued, the job is being processed.
- 🟢 Complete - When green, the job has been completed successfully with no errors.
- 🟠 Complete - When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

Bulk Admin Job - Sub Org Move

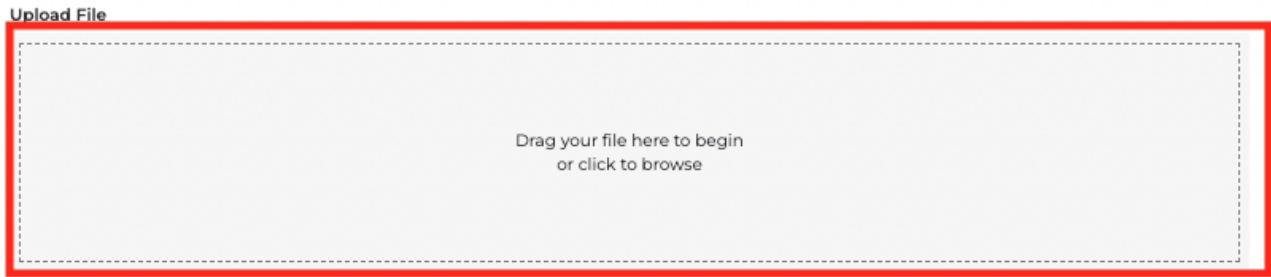
To move users in different sub-organisation follow the steps below:

1. Click the arrow and select “Sub Org Move” then select “Download Template”.



2. When you open the template enter the username/s and the target Sub Org Id ([click here](#) to learn how to obtain this)

- Save your CSV and upload or drag it into the box below.



- When it has been uploaded click “Submit”.

Create Bulk Admin Job

JOB TYPE
Sub Org Move x v DOWNLOAD TEMPLATE

Upload File

etrainu-sub_org_move-template-2023-03-05 (2).csv 🗑️

SUBMIT

- The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
27/02/2023 07:55:21	etrainu-USER_ARCHIVE-template-2023-02-27 (1).csv	User Archive	🕒 Queued	Jona Obillo			View Details
20/12/2022 13:37:43	etrainu-USER_IMPORT-template-2022-12-20.csv	User Import	🕒 Complete	Admin Etrainu	20/12/2022 13:38:00	20/12/2022 13:38:07	View Details
20/12/2022 13:22:46	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	✔ Complete	Admin Etrainu	20/12/2022 13:23:00	20/12/2022 13:23:00	View Details
20/12/2022 13:21:35	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	✔ Complete	Admin Etrainu	20/12/2022 13:22:00	20/12/2022 13:22:00	View Details
20/12/2022 13:06:36	etrainu-COURSE_DELETE-template-2022-12-20.csv	Course Delete	✔ Complete	Admin Etrainu	20/12/2022 13:07:00	20/12/2022 13:07:00	View Details
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	✔ Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

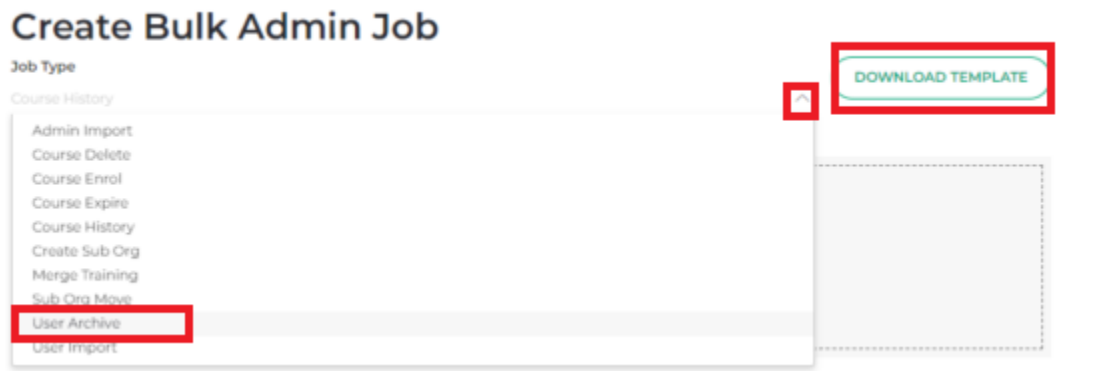
Status Legend

- 🕒 Queued - When queued, the job is being processed.
- ✔ Complete - When green, the job has been completed successfully with no errors.
- 🕒 Complete - When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

Bulk Admin Job - User Archive

To archive users in your organisation follow the steps below:

1. Click the arrow and select “User Archive” then select “Download Template”.

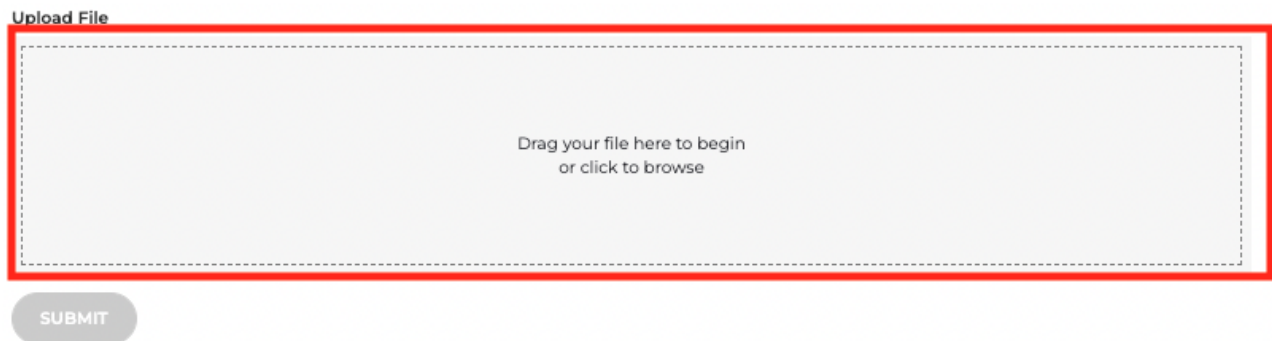


2. When you open the template enter the username/s that are required to be archived.

The screenshot shows a spreadsheet template titled 'etrainu-USER_ARCHIVE-template-2023-02-27'. The spreadsheet has columns A through F and rows 1 through 11. The first four rows contain the following data:

	A	B	C	D	E	F
1	username					
2	testusertest					
3	testusername1					
4	testusername2					
5						
6						
7						
8						
9						
10						
11						

3. Save your CSV and upload or drag it into the box below.



4. When it has been uploaded click “Submit”.

Create Bulk Admin Job

JOB TYPE

User Archive

x v

DOWNLOAD TEMPLATE

Upload File

etrainu-USER_ARCHIVE-template-2023-02-27 (1).csv

SUBMIT

5. The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
27/02/2023 07:55:21	etrainu-USER_ARCHIVE-template-2023-02-27 (1).csv	User Archive	Queued	Jona Obillo			View Details
20/12/2022 13:37:43	etrainu-USER_IMPORT-template-2022-12-20.csv	User Import	Complete	Admin Etrainu	20/12/2022 13:38:00	20/12/2022 13:38:07	View Details
20/12/2022 13:22:46	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	Complete	Admin Etrainu	20/12/2022 13:23:00	20/12/2022 13:23:00	View Details
20/12/2022 13:21:35	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	Complete	Admin Etrainu	20/12/2022 13:22:00	20/12/2022 13:22:00	View Details
20/12/2022 13:06:36	etrainu-COURSE_DELETE-template-2022-12-20.csv	Course Delete	Complete	Admin Etrainu	20/12/2022 13:07:00	20/12/2022 13:07:00	View Details
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

Status Legend

Queued

- When queued, the job is being processed.

Complete

- When green, the job has been completed successfully with no errors.

Complete

- When orange, the job has been completed but there are errors. To review the errors click on "View Details". This will display the errors and the reasons on screen.

Notes:

- The job may have the status "Queueing" the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

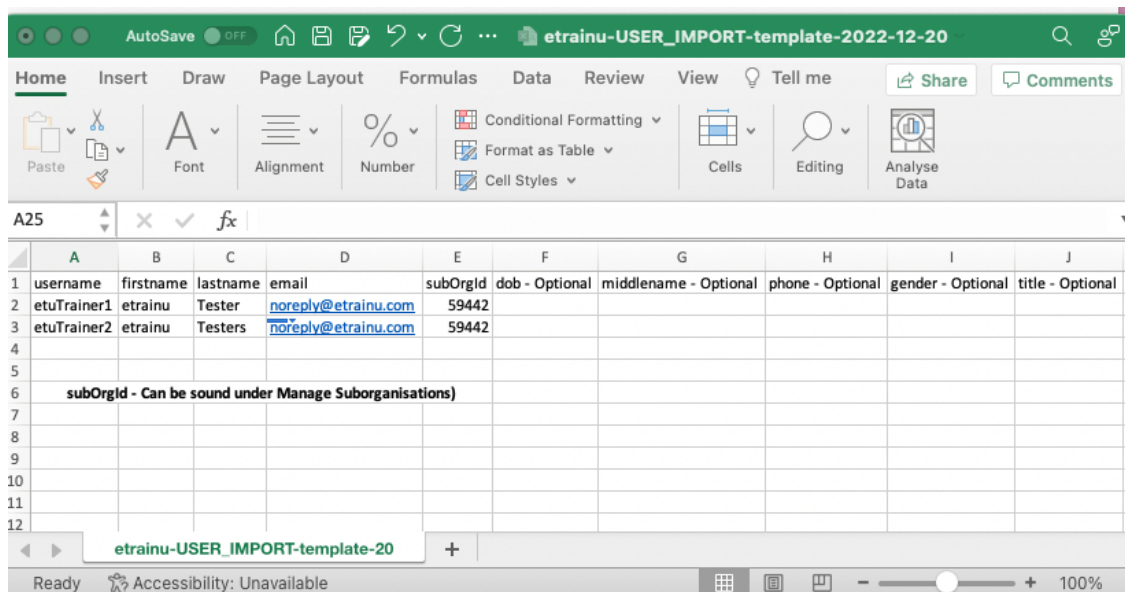
Bulk Admin Job - User Import

To add new users to your organisation follow the steps below:

1. Click the arrow and select “User Import” then select “Download Template”.

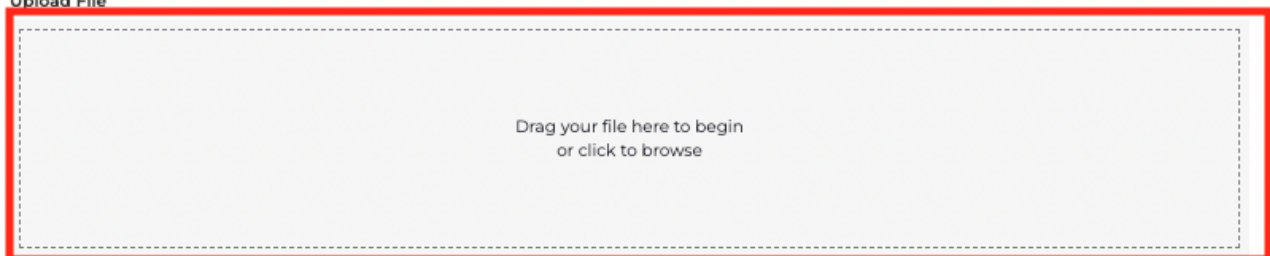


2. When you open the template enter details of the users: username of the account (keep the same format as your other users in the system), first name, last name, email, suborgid ([click here](#) to learn how to obtain this). The other fields (dob, middle name, phone, gender title) are optional.



3. Save your CSV and upload or drag it into the box below.

Upload File



SUBMIT

4. Select the DOB Format (as entered on your CSV). ****Not required if this field is blank****

DATE FORMAT

DD/MM/YYYY
MM/DD/YYYY
YYYY-MM-DD

SUBMIT

5. Under “Send User Registration Notifications” advise if you want these to be sent.

SEND USER REGISTRATION NOTIFICATIONS

Yes - Send registration notifications

No - Do not send registration notifications
Yes - Send registration notifications

Note: Yes - If you want the log in details emailed to your users; No - if log in details are not to be emailed.

6. When it has been uploaded click “Submit”.

JOB TYPE
User Import ✕ ▼ DOWNLOAD TEMPLATE

Upload File

etrainu-USER_IMPORT-template-2022-12-20.csv 🗑️

DOB DATE FORMAT
DD/MM/YYYY ▼

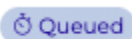
SEND USER REGISTRATION NOTIFICATIONS
Yes - Send registration notifications ▼

SUBMIT

7. The job will then process.

Date Created ↓	File Name ↑	Type ↑	Status ↑	Created By ↑	Start Time ↑	End Time ↑	
20/12/2022 13:37:43	etrainu-USER_IMPORT-template-2022-12-20.csv	User Import	Queued	Admin Etrainu			View Details
20/12/2022 13:22:46	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	Complete	Admin Etrainu	20/12/2022 13:23:00	20/12/2022 13:23:00	View Details
20/12/2022 13:21:35	etrainu-COURSE_HISTORY-template-2022-12-20 (1).csv	Course History	Complete	Admin Etrainu	20/12/2022 13:22:00	20/12/2022 13:22:00	View Details
20/12/2022 13:06:36	etrainu-COURSE_DELETE-template-2022-12-20.csv	Course Delete	Complete	Admin Etrainu	20/12/2022 13:07:00	20/12/2022 13:07:00	View Details
20/12/2022 11:47:28	etrainu-MERGE_TRAINING-template-2022-12-20.csv	Merge training	Complete	Admin Etrainu	20/12/2022 11:47:30	20/12/2022 11:47:31	View Details

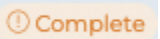
Status Legend



- When queued, the job is being processed.



- When green, the job has been completed successfully with no errors.



- When orange, the job has been completed but there are errors. To review the errors click on “View Details”. This will display the errors and the reasons on screen.

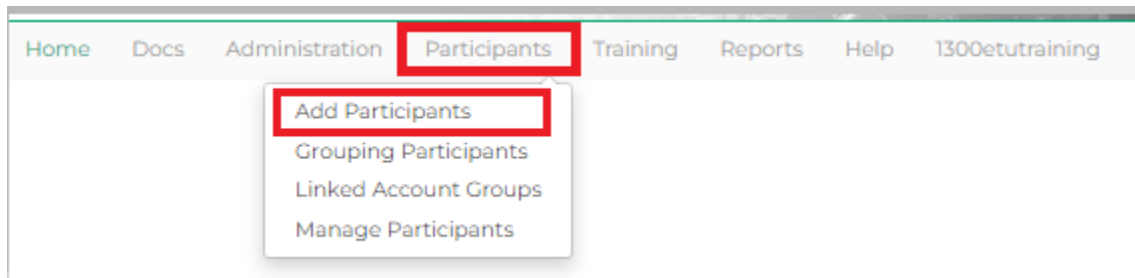
Notes:

- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.
- If you have an integration please contact your Customer Success Manager as we do not recommend using this feature.

Creating a Participant Account

To give someone access to the LMS, you must create them a participant account. Having a participant account allows the participant full access to complete training available to them within the LMS.

3. Click on “Participants”, followed by “Add a New Participant”.



4. Fill in the Manage Participants screen to create a participant account. Please note you will need to enter at minimum all mandatory information marked with an asterix *.

Username: We suggest keeping this unique to your organisation.
Example: Firstname.Lastname.orgname

Password: When creating the password it must be between 8 and 50 characters and contain at least 3 of the following: English upper case; English lower case; Numeric characters (0 through 9); Non-alphabetic printable characters
Example: eTrainu!2022

When creating the account, when selecting the “Department” and “Sub-Organisation”, note this is where the participant’s account will sit in relation to the system hierarchy reviewed earlier in this guide.

Email: Please keep this unique to each participant. Any emails sent from the etrainu LMS will be sent to this email address. This includes the account creation details.

Manage Participants

Add a New Participant

The form is divided into three main sections, each highlighted with a red border:

- Account Information:** Includes fields for Username (pre-filled with 'Jessica.Lee@etu'), Password (with a strength indicator 'Very Strong'), Department (pre-filled with 'QLD'), and Sub-Organisation (pre-filled with 'Brisbane Metro').
- Contact Information:** Includes Email (pre-filled with 'helpdesk@etrainu.com'), Building/Property Name, Street Number, Suburb, Country, Postcode, Flat/Unit Details, Street Name, State, and Phone Number.
- Personal Information:** Includes Title, Middle Name, Gender (radio buttons for Male, Female, Other), First Name (pre-filled with 'Jessica'), Last Name (pre-filled with 'Lee'), and Date of Birth.

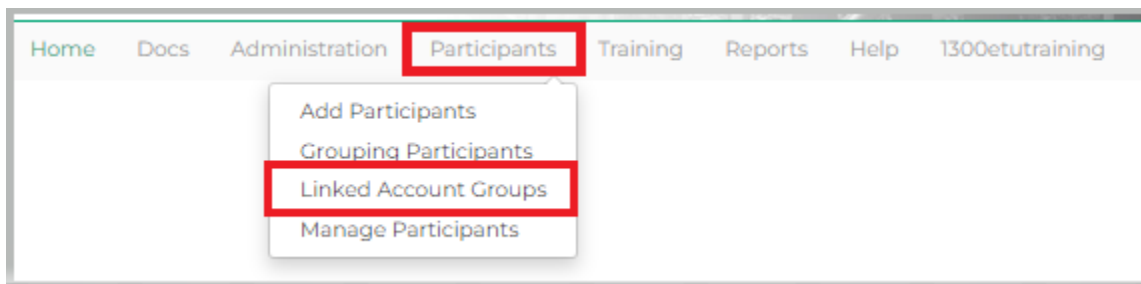
At the bottom right, there are 'CANCEL' and 'SAVE' buttons, with the 'SAVE' button highlighted in red.

Creating a Linked Account

A linked account group allows someone with multiple accounts types to switch between these without having to log out and log in each time they need to move between them. Typical switch links will include Participant, Administrator, Supplier (Training Admin) or Assessor.

To find out more about Assessor and assessor sections in the platform, please refer to the Supplier /Assessor User Guide.

6. Click on "Participants", then select "Linked Account Groups".



7. When the next page opens, click "Add New". Search for the account in the "**Search By Account Name**" to ensure one has not been created already. We suggest to search by the participant account username. If nothing comes up click "**Add new**".

Manage Linked Account Groups

Search by Account Group Name:

8. Enter either the First Name or Last name of the user or their username and click “Search”.

Find Accounts to Add

Name ⓘ

Search

First Name	Last Name	Username	Email	Org Name	Role	Actions
Search for an account to add to the linked account group.						

9. Find the accounts to link and click on the +.

First Name ↑	Last Name ↑	Username ↑	Email ↑	Org Name ↑	Role ↑	Actions
Admin	Nsw	1300etunswadmin	admin@etrainu.com	NSW View Path	Department Admin	+

10. When you have added all of the accounts required click “Done”.

Edit Linked Account Group

Linked Accounts

First Name	Last Name	Username	Org Name	Role	Actions
Admin	Etrainu	1300etutrainu	etrainu - Training	Org Admin	<input checked="" type="checkbox"/> <input type="checkbox"/>
Admin	Nsw Metro	1300NswMetro	NSW - Metro	Sub-org Admin	<input checked="" type="checkbox"/> <input type="checkbox"/>
Mary	Jane	maryjane	Brisbane Metro Participants	Participant	<input checked="" type="checkbox"/> <input type="checkbox"/>
Mark	Smith	mark.smith.etu	NSW - Metro Participants	Participant	<input checked="" type="checkbox"/> <input type="checkbox"/>
Admin	Nsw	1300etunswadmin	NSW	Department Admin	<input checked="" type="checkbox"/> <input type="checkbox"/>

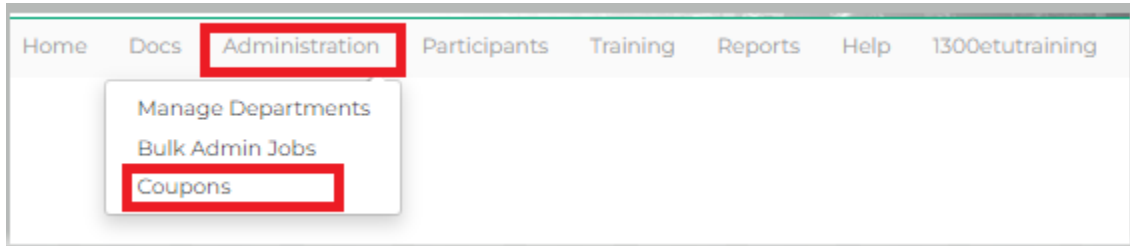
Done

Note: We suggest searching for a linked account first before clicking “Add New” as the other account/s may not appear.

Creating a coupon code

To create a coupon code follow the steps below.

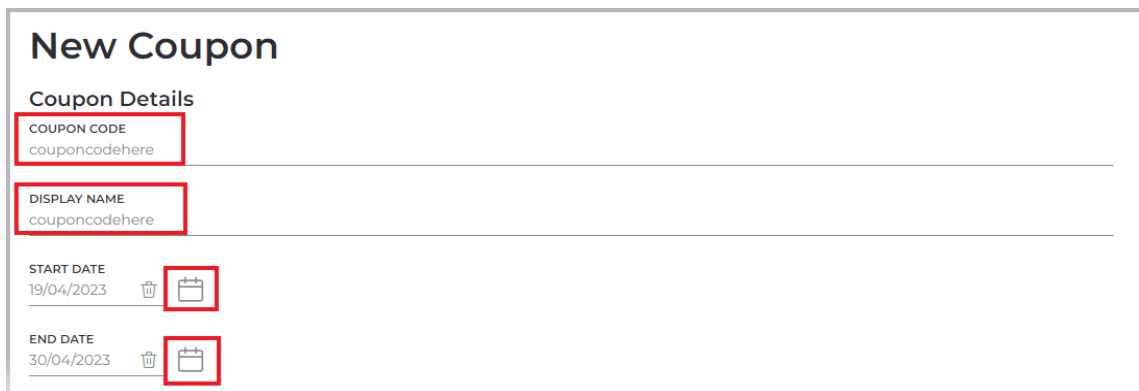
Step 1: From your org admin account, go to Administration then Coupons.



Step 2: Click on Add Coupon to create new code or use the search field to search for any existing code.



Step 3: Enter the coupon code in the Coupon Code and Display Name Fields then add the dates.



A screenshot of the 'New Coupon' form. The 'Coupon Details' section has four fields: 'COUPON CODE' with the placeholder 'couponcodehere', 'DISPLAY NAME' with the placeholder 'couponcodehere', 'START DATE' with the value '19/04/2023' and a calendar icon, and 'END DATE' with the value '30/04/2023' and a calendar icon. Each of these four fields is highlighted with a red box.

Step 4: Advise the coupon type and then the amount and whether there is a limit on uses

COUPON TYPE

Percentage Discount

DISCOUNT AMOUNT

100

MAX NUMBER OF USES

1

Step 5: Select the Supplier then either scroll to find the course/s required and tick the box or type the course name in the search field. Then click on Save.

Course Selection

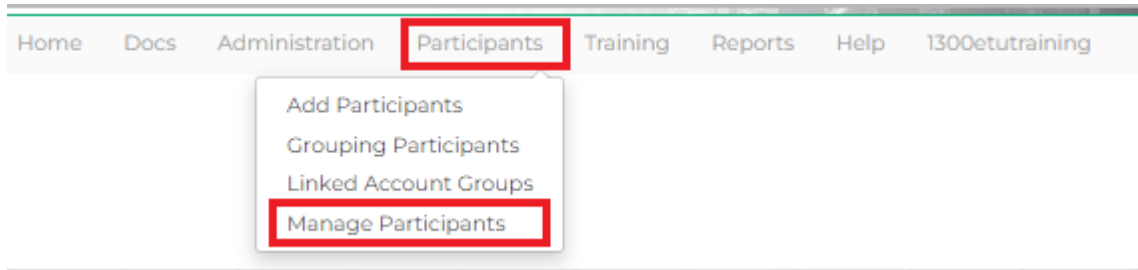
- Dulux - Organic Gardening
- etrainu - Assessing App Training Demo
- etrainu - Demonstration Course
- etrainu Showcase
- ETU - Event App Demo Zosia
- etu - Zendesk 101
- Jo Lukins - Embrace the Suck
- NDS Scenario Assessment
- Showing Gen
- SLSA Bronze Demonstration 2019
- Demo - Policy
- Asahi - Chain of Responsibility
- Care and Support - Event App Demo

Note: you can add multiple courses per code. To do this just tick the boxes and/or clear the search field.

Managing Participants - Overview

The etrainu LMS allows you to manage your participant accounts within your administrator access view.

To access the “Manage Participants” screen, click “Participants”, followed by “Manage Participants”.



On this page, you can search for Admin or Participants. To search for a particular Participant record, follow the below instructions.

1. Click “Participants” from the User Type.
2. Within the search criteria, type the name/email/username of the Participant you wish to locate and select the type of criteria by selecting from the drop-down box.

Note: Click on the *Include Archived Participants* toggle if you cannot locate the Participant in case their account has been archived.

Manage Users

Search Options

User Type

- Admins

- Participants

Criteria

Department

Select Department...

Sub-Organisation

Select Sub-Organisation...

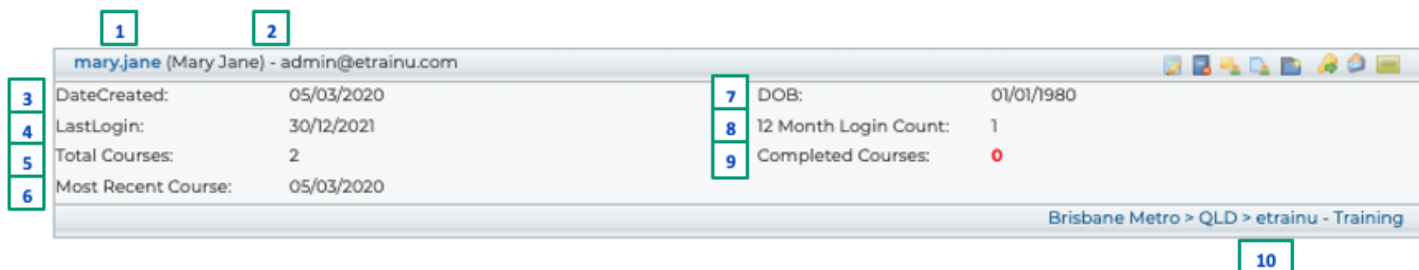
Include Archived Users

SEARCH

Name
Name
Email Address
Username
UserID
(Advanced)

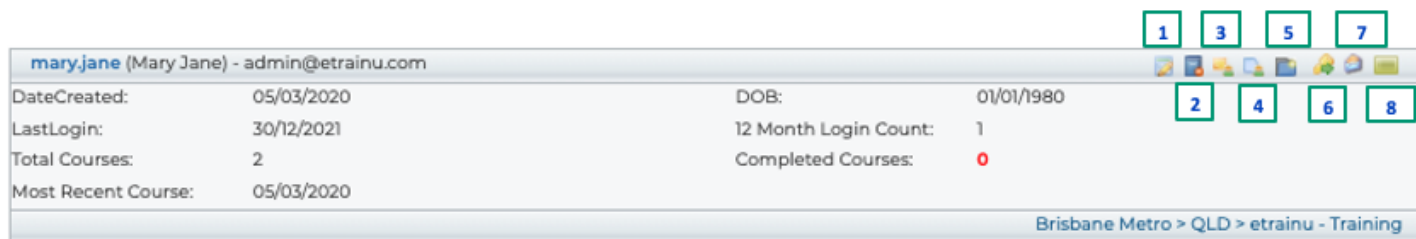
3. Click “Search”.

When your search has been run, there are a number of functions you can access to manage a Participant account. The below information outlines a snapshot of the Participant’s account as follows.



1. **Username**
2. **Name and email of the Participant**
3. **Date their account was created**
4. **Date the Participant last logged in**
5. **Total courses that have been allocated to the Participant** *(This is the total inductions under each course).*
6. **Date Most Recent Course was accessed**
7. **The Participant's date of birth**
8. **12 Month Login:** This outlines the number of times the Participant has logged into the platform in the last 12 months.
9. **Completed Courses:** This outlines the number of courses the Participant has completed.
10. **The Department and Sub-organisation location in which the Participant's account is allocated**

In addition to the above snapshot, as an administrator you will have access to perform the following functions:

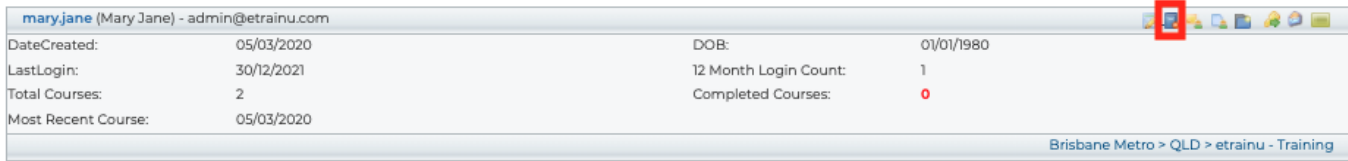


1. **Edit Account:** This allows you to edit a participant's details or reset their password.
2. **Archive Account:** When a participant has left the organisation and no longer requires access to the LMS, you can archive their account.
3. **Notes:** This allows you to record notes on the Participant.

4. **Documents:** This allows you to upload additional documentation relevant for the participant's account .
5. **User Records:** This allows you to upload additional documentation relevant for the participant's account that you wish to share with the participant view.
6. **Send Keys:** This icon allows you to send training to the Participant.
7. **Email:** This icon allows you to send a personalized email from the LMS directly to the Participant.
8. **View Training:** This allows you to view at a deeper level the training results, progress of the participant and course expiry dates on course records for participants.

Archive Participant Account

To archive a participant's account, click the "archive" icon from the menu bar.



mary.jane (Mary Jane) - admin@etrainu.com			
DateCreated:	05/03/2020	DOB:	01/01/1980
LastLogin:	30/12/2021	12 Month Login Count:	1
Total Courses:	2	Completed Courses:	0
Most Recent Course:	05/03/2020		

Brisbane Metro > QLD > etrainu - Training

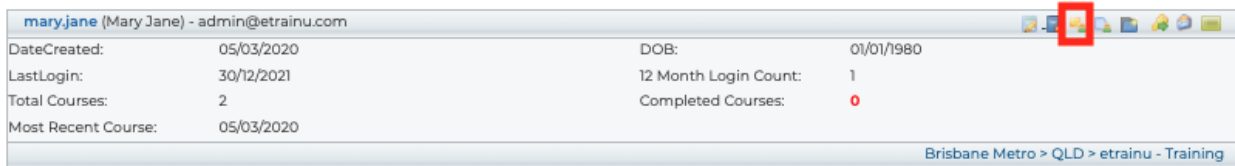
Please note if you want to view this record at a later date, when searching for a participant record, simply ensure the "Include Archived Participants" button is ticked when running your search.

To unarchive the user, once you have searched for them click the "Unarchive" button.

Add Notes to a Participant

Adding notes to a Participant's account allows you to record relevant information and notes to share between Administrators. These are not visible to the Participant.

1. Locate the Participant using the "Manage Participants" steps.
2. Click on the "Notes" icon.



mary.jane (Mary Jane) - admin@etrainu.com			
DateCreated:	05/03/2020	DOB:	01/01/1980
LastLogin:	30/12/2021	12 Month Login Count:	1
Total Courses:	2	Completed Courses:	0
Most Recent Course:	05/03/2020		

Brisbane Metro > QLD > etrainu - Training

3. Type your notes in the field and click "Save".

Update Notes

Update Notes for *Etrainu Helpdesk*

Notes

Enter any information about this learner below.
All notes for this learner can only be viewed and updated by other region administrators linked to your region.

Type Note Here...

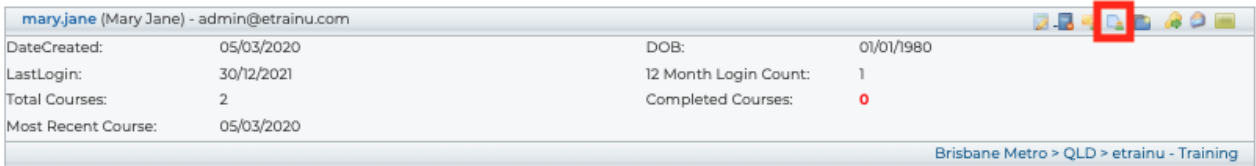
Previous Notes

Date Posted: 05/10/2021 09:32:32 PM Posted By: Ayo Org

Upload a Document to a Participant Account

Adding documents to a participant's account can be a great place to store this information to save an administrator working across multiple systems. Documents, once added, cannot be removed. These documents are not visible to a participant.

1. Locate the participant using the "Manage Participants" steps.
2. Click on the "User Documents" icon.



3. Click "Update a New Document".

Update Documents

[Upload a New Document](#)

Update Documents for *Mary Jane*

Click on the header to sort by that column.

Name	Uploaded	Archived
No documents exist.		

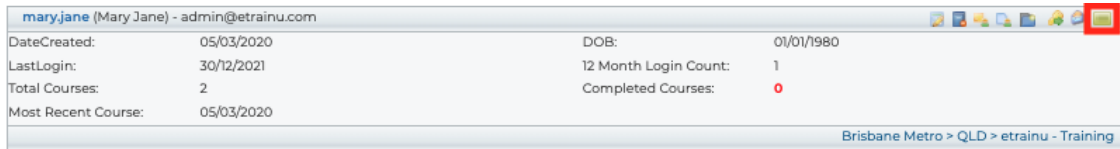
4. Complete the document upload information and upload a document using the "Choose File" button.
5. Click "Save".

A screenshot of the 'Document Information' form. It features two required fields: 'Document Name' with the value 'New Document' and 'File Name' with a 'Choose file' button and the text 'No file chosen'. A red box highlights the 'Choose file' button. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted in green. A note at the bottom states 'Fields marked with a * are required.'

Check Participant Training Progress

This is the most commonly used function within the LMS and Manage Participants section. This function allows you to view the progress status of a Participant.

1. Locate the Participant using the “Manage Participants” function.
2. Click on the “View Training” icon.



3. Within this screen, you can see the Course (Bundle) and Module (Inductions) within the bundle; plus, complete additional actions for the Participant’s record.

	3	4	5	6	7		
1	Training Name	Code	Provider	Status	Details	Documents	Actions
2	COVID-19: What it is, How to Prevent Spread (Bundle)		Etrainu Courses	In Progress	Access Given 21/09/2021 Training Expires 21/04/2022		Course Actions -
	COVID-19: What it is, How to Prevent Spread		Etrainu_Courses	Not Started	Access Given 21/09/2021		Recalculate Status 8 Update Expiry Date 9

Work Health and Safety (Bundle)		Etrainu Courses	In Progress	Access Given 31/12/2021		Course Actions -
- ETU-01: ETUGNWOHS003 etrainu - Work Health and Safety		Etrainu Courses	Not Started	Access Given 31/12/2021		Module Actions -
						✓ Progress 10

COVID-19: What it is, How to Prevent Spread (Bundle)		Etrainu Courses	Complete	Access Given 31/12/2021 Completed 01/12/2021 Competent 01/12/2021		Course Actions -
- COVID-19 (Coronavirus): What It is, How to Prevent Spread		Etrainu Courses	Complete	Access Given 31/12/2021 Completed 31/12/2021 Competent 31/12/2021		Recalculate Status Update Completion Date 11


1. **Course (Bundle) Name:** This is the course name the Participant has enrolled into.
2. **Module (Induction) Name:** These are the inductions (or modules) included within the Bundle (course) that make up the package.
3. **Code:** Training code for the course (if applicable).
4. **Provider:** Supplier that the training is under in the LMS.
5. **Status:** This section outlines whether the course is In Progress, Not Yet Started, or Complete.

6. **Details:** This section outlines the date on which the course was allocated, completed, and marked as competent.
7. **Documents:** Certificates (if applicable) can be accessed here.
8. **Recalculate Status:** Is used as a troubleshooting step in instances where all inductions are complete, but the bundle isn't marked as complete.
9. **Update Expiry:** Courses that have an expiry date can be extended if the course is still in progress and is before the expiry date. This functionality is for the Organisation Administrator level.
10. **Progress:** Is used to mark the module (induction) complete.
11. **Update Completion Date:** Administrators can now set course expiry dates on course records for participants.

Printing a Participant's Certificate

Certificates of completion can be attached at either Bundle level, Induction level, or sometimes both. At times, a course may not have a certificate of completion attached at all.

To download a copy of a certificate if it is available, click on the "View Certificate" icon. This will download and open the certificate in a new tab for printing.

Training Name	Code	Provider	Status	Details	Documents	Actions
COVID-19: What It Is, How to Prevent Spread (Bundle)		Etrainu Courses	Complete	Access Given 31/12/2021 Completed 31/12/2021 Competent 31/12/2021		Course Actions -
- COVID-19: What It Is, How to Prevent Spread		Etrainu Courses	Complete	Access Given 31/12/2021 Completed 31/12/2021 Competent 31/12/2021		

In addition, the following key is used in this "Documents" column.

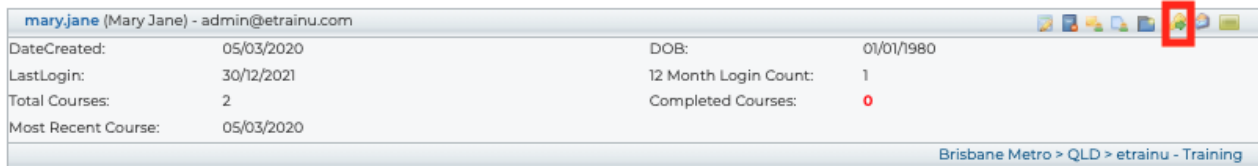


1. **View Results:** This will be made available if the course has access to view results.
2. **View Certificate:** This is made available when a generic certificate is available.
3. **View Customer Certificate:** This is made available if a custom certificate is attached.
4. **No Certificate Available:** This highlights there is no certificate available.
5. **No Permission to View Certificate:** This highlights you do not have access to view the certificate.

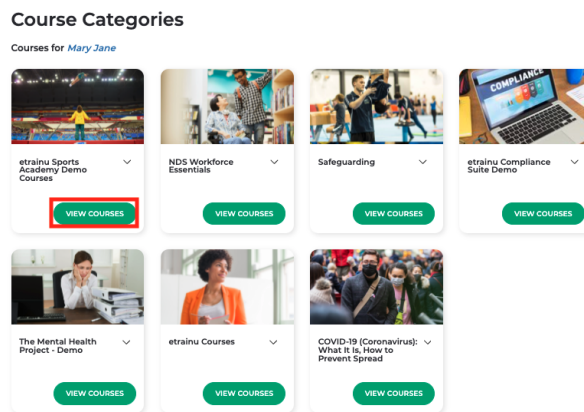
Assign Training - Individual

There are two methods in which you can assign training: assigning training per individual and by assigning training to a bulk group of Participants. To assign training to an individual, follow the below steps:

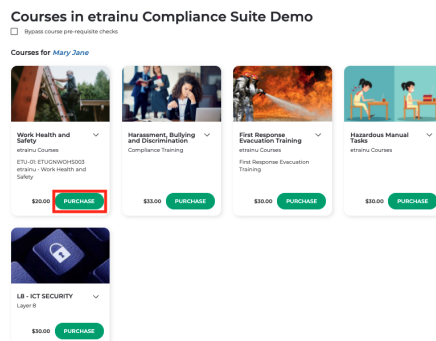
1. Locate the Participant using the “Manage Participants” steps.
2. Click on the “Send Keys” icon.



3. You will then be directed to the Course Categories page, where you can select the course category where the desired training course is assigned. Click “View Courses” to view the suite of courses within that specific category.



4. Locate the course you wish to allocate and click “Enrol” or “Purchase”.



Note: when assigning training you can select *Bypass course pre-requisite checks*.

5. If the course has an enrolment fee you will be taken to a payment page. You will need to enter your credit card details or a Coupon Code, including the country in the billing address, and then click “Submit Payment”.

< Back **CHECKOUT**

My Information

Participant Etrainu

Billing Address

House number/name

Street

City

State Zip

Country *

Order Summary

Qty	Name	Price
1	How to Stay Productive While Working From Home	\$27.27

Enter Coupon

Total (AUD) **\$27.27**
Total Includes GST

Credit Card

Card number
1234 5678 9012 3456

Expiry date Security code
MM/YY 3 digits

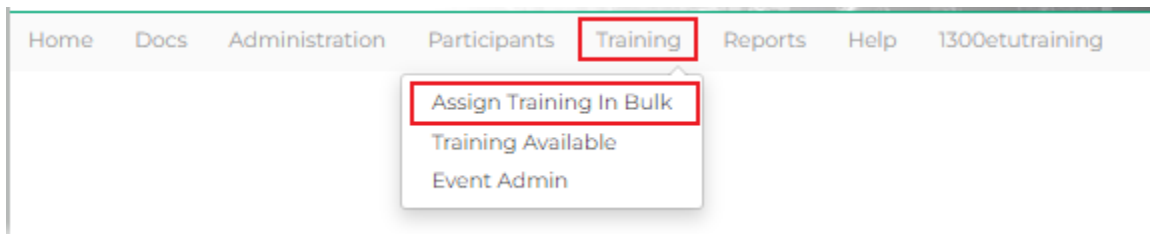
6. Once processed, it will take you back to the Manage Participants screen and will be available immediately in the user's account.

Assign Training - In Bulk

If you have a large number of Participants to assign training to, you may prefer to use the “Assign Training in Bulk” function. This function allows you to assign a training course to a group of Participants.

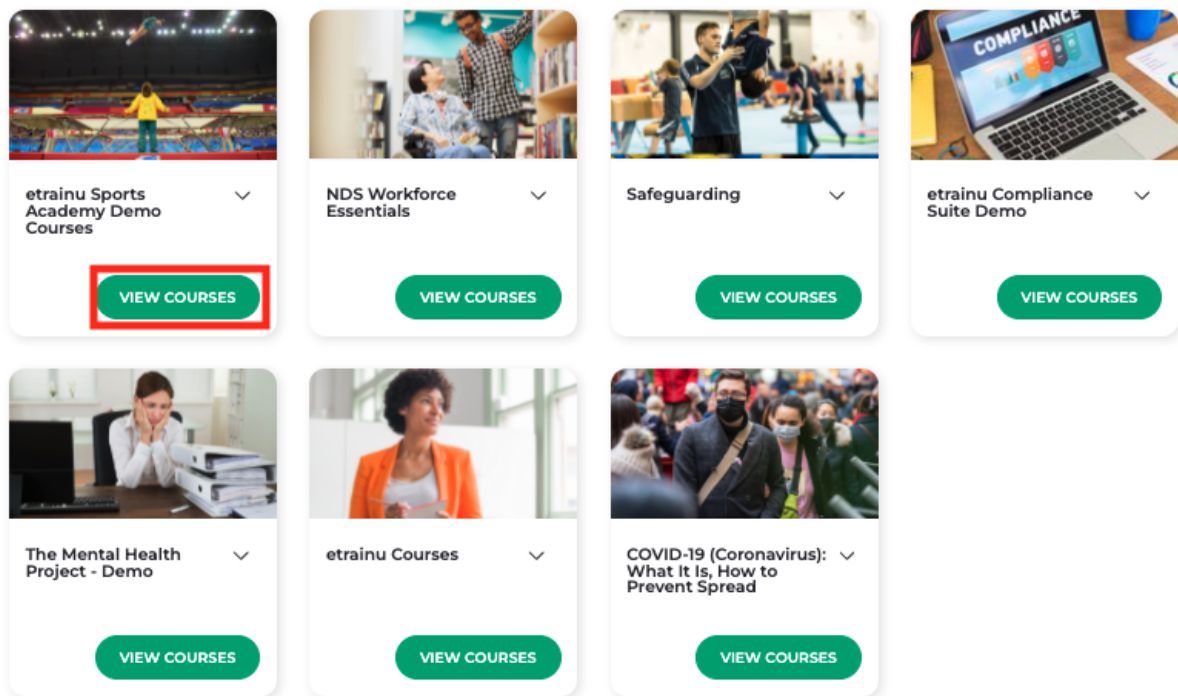
Note: when assigning training in bulk, it will not appear in a Participant’s account until the following day (if processed before 6.00 pm AEST. DO NOT attempt to reassign this course until at least 24 hours after the first attempt.

1. Click “Training” from the menu bar at the top of the screen, followed by “Assign Training in Bulk”.



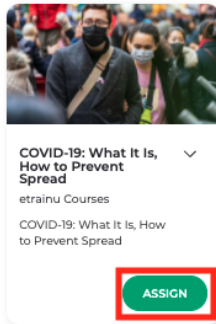
2. You will then be directed to the Course Categories page; here, you can select the course category where the desired training course is assigned. Click “View Courses” to view the suite of courses within that specific category.

Course Categories



3. Locate the course you wish to allocate and click "Assign".

Courses in COVID-19 (Coronavirus): What It Is, How to Prevent Spread



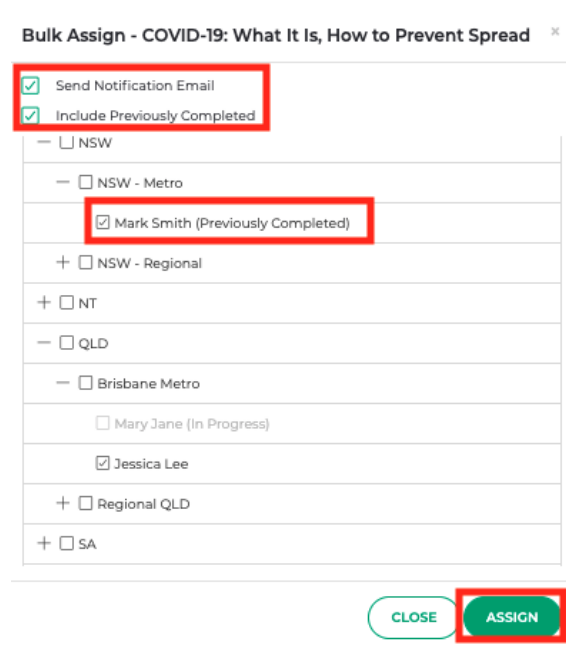
4. You will then be directed to a list of Participants within your administration access view. From this list, select all Participants you wish to assign the course to. You will be able to see the participants who are in progress for the course or have completed the course.

Participants that are in progress will be greyed out and you will not be able to assign the course to them.

5. If you wish to send all Participants an email notification, click "Send Notification Email"; if you do not click this, an email notification will not be sent.

You can also select "Include Previously Completed" if you want to reassign the course to a Participant.

6. Click "Assign".



- On the next page, you can enter a coupon code if one is available, including the country in the billing address. If a valid coupon code is applied, the credit card section will automatically disappear since the course will be at no cost.

The screenshot shows a checkout page with the following sections:

- My Information:** Admin Etrainu
- Billing Address:** Fields for House number/name, Street, City, State, Zip, and Country (highlighted with a red box).
- Order Summary:** Qty: 3, Name: Let's Talk Disability, Price: \$327.27. Total (AUD): \$327.27. Total Includes GST.
- Coupon:** Enter Coupon field (highlighted with a red box) and an APPLY button.
- Credit Card:** Card number: 1234 5678 9012 3456, Expiry date: MM/YY, Security code: 3 digits.
- Submit Payment:** A blue button at the bottom right.

- If no coupon is available, input the credit card details, including the country in the billing address. Then click on 'Submit Payment.'

This screenshot is identical to the previous one, but with the following elements highlighted in red:

- The **Credit Card** section, including the card number, expiry date, and security code fields.
- The **SUBMIT PAYMENT** button at the bottom right.

- Once processed, it will redirect you back to the course category where you can assign more training.

Note: The courses are assigned overnight (if processed before 6.00 pm AEST). Courses that have prerequisites may not be assigned if the user has not met these. You will be sent an email after the system assigns the course to advise if any users did not get allocated the course. You can pull a bulk course distribution report to review.

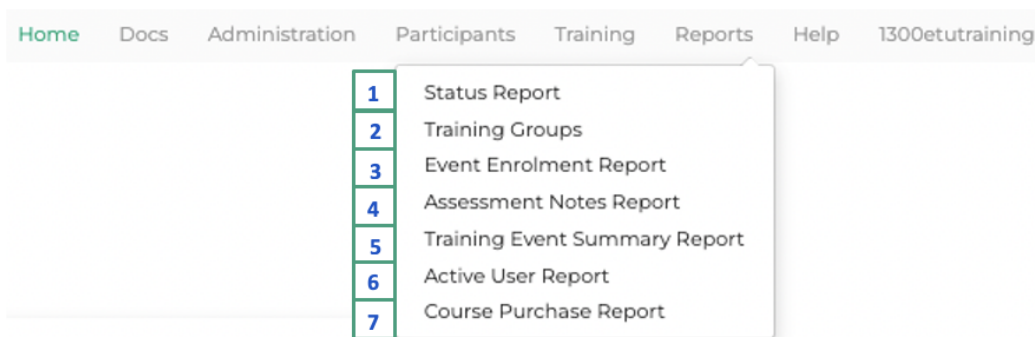
Viewing Reports

The etrainu LMS has a range of reports that can be switched on/switched off for your organisation subject to your organisational needs.

When building your reports, you have the ability to customise and filter these according to your individual reporting needs. You can filter by date ranges, completion status, individual bundles, Participant groups and training groups.

All reports can be exported in Excel, CSV and PDF formats.

The below reports are our most commonly used reports and functions.



1. **Status Report:** This report will show you the training status and progress for all Participants within a selected course.
2. **Training Groups:** This feature allows you to group multiple training items together to help with reporting builds.
3. **Event Enrolment Report:** This report outlines the events and the status the Participant is enrolled into.
4. **Assessment Notes Report:** This report outlines the notes advised when a Participant is assessed through the assessing app.
5. **Training Event Summary Report:** This report outlines the status of each event, assessor participants.
6. **Active User Report:** This report outlines all Participants in your organisation.
7. **Course Purchase Report:** This report outlines purchases made with the transaction history.

Bulk Course Distribution Report

A bulk distribution report provides you with the information for the courses an administrator has assigned in bulk.

View Reports

Bulk Course Distribution Report

Select from the drop down box the column header you wish to sort by then enter the key word in search field in relation to that column.

1 **Keywords**

[clear all filters](#)

*Graph data displayed includes all bulk assignment events (batches) listed in the table below.

Click on the header to sort by that column.

2	3	4	5	6	7	8	9	10	11
Batch	Course Name	Submitted On	Submitted By	Bundle	Processed On	Submitted	Allocated	Not Allocated	Reports
2	COVID-19: What It Is, How to Prevent Spread	31/12/2021 13:38:52	Admin Etrainu	Yes	31/12/2021 18:30:07	2	2	0	
1	Safeguarding for Sport	19/03/2020 16:06:58	Admin Etrainu	Yes		2	0	2	
Total						4	2	2	

12

1. **Course Name/Submitted By:** Filter by the Course name or who submitted
2. **Batch:** Batch Number in the etrainu LMS.
3. **Course Name:** Name of the Course.
4. **Submitted On:** Date and time request was submitted.
5. **Submitted By:** Who submitted the course assign request.
6. **Bundle:** Course type.
7. **Processed on:** Date and time request was processed.
8. **Submitted:** Number of accounts the request was sent to.
9. **Allocated:** Number of accounts the request was allocated to.
10. **Not Allocated:** Number of accounts the request was not allocated to.
11. **Reports:** List of users who were in the course assign request.
12. **Export to Excel:** Ability to save the report to excel.

Training Status Report (Legacy)

The Training Status report outlines the training status for your Participants and can be filtered to suit your needs. To build your report, consider the following filters:

Training Status Report

ORGANISATION: etrainu - Training

1 DEPARTMENT: Select department

SUB-ORGANISATION: Select sub-organisation

2 PARTICIPANT GROUP: OR Select participant group

COURSE: COVID-19: What It Is, How to Prevent Spread

3 MODULE: Select training

TRAINING GROUP: Select training

4 TRAINING STATUS*: In Progress, Completed

DATE TRAINING WAS ASSIGNED: Last 30 days

FROM: 05/07/2022 TO: 04/08/2022

5 DATE USER WAS CREATED: Select a date range

DATE COURSE WAS COMPLETED: Select a date range

6 EXTRA DISPLAY FIELDS: Department, DOB, Email, Gender, Phone, Sub-Org

7 ADDITIONAL OPTIONS: INCLUDE ARCHIVED USERS

Report Filters

Organisation: etrainu - Training

Department: No filter selected

Sub-organisation: No filter selected

Training: COVID-19: What It Is, How to Prevent Spread

Training Status: In Progress, Completed

Date Training Was Assigned: Last 30 days

Date User Was Created: No filter selected

Date Course Was Complete: No filter selected

Extra Display Fields: Department, DOB, Email, Gender, Phone, Sub Org

Additional Options: No filter selected

8 REPORT NAME

9 SCHEDULE FREQUENCY

EMAIL RECIPIENTS: Comma separated email address

SAVE & SUBMIT

1. **Department/Sub-organisation:** If you wish to only pull data for a specific Department or Sub-organisation, you may use these filters - leaving this blank will pull all data you have access to.
2. **Participant Group:** If you have a specific Participant Group set up, you can pull this group of Participants.
3. **Course/Module/Group:** A Course (bundle) is the completed course itself in full (recommended); A Module (induction) is a section within a Course (bundle); a “Group” refers to a Training Group which captures a group of training courses (refer to “Training Groups” to understand this functionality).

4. **Training Status:** At Course and Group Level you can filter the training status by “In Progress”, “Complete” or “Deactivated” . The “In Progress” and “Completed” options are selected as a default. At Module level you can filter the training status by “Not Started”, “Awaiting Final Competency”, “In Progress”, “Completed” or “Deactivated”.
5. **Date Ranges:** You can filter the reports based on training assigned dates, participant creation dates and/or completion dates.
6. **Extra Display Fields:** You can choose to select All fields or you can select additional fields such as Department, Date of Birth, Email, Gender, Phone, Sub-Org & Course Instance ID.
7. **Additional Options:** You can choose to include users that have been archived.
8. **Save Report:** You also have the option to save the report on the left. This functionality allows you to save the report (so you don’t have to complete the above fields next time) and also set a schedule to have the report sent to a nominated email address.
9. **Save & Submit:** Click this to create your report.

Training Status Report

The Training Status Report - BETA outlines the training status for your Participants and can be filtered to suit your needs. This is a new and improved report providing real-time data ensuring that users have the most current information. The old Training Status Report is still available but we encourage the admins to use the new one as it will be decommissioned at some point in the future.

Training Status Report (Beta)

1 All courses completed or in progress that were assigned in the last 30 days x EDIT FILTERS (3) + 2

Organisation: etrainu - Training Courses: All Courses (In Progress, Complete) Date Training Was Assigned: Last 30 days

Report Results

3 Group Summary ⌵

Group	Total Participants	In Progress	Completed	Total Training Items
QLD	1	1 (100%)	0 (0%)	1

Showing 1 - 1 of 1 training records. (View by Status) EXPORT 4 5

1. **Default Reports** - This will provide immediate value upon setup without requiring manual configuration of the filters. The default report options include:
 - All courses completed or in progress that were assigned in the last 30 days.
 - All courses completed or in progress that were assigned in the last 30 days.
 - All courses completed or in progress.
- Note:** Saved Reports from the previous Training Status Report will be supported in the new report.
2. **Edit Filters** - To customise the report, use the edit filter function.
3. **Group Summary** - To maximise screen space and streamline the interface, Group and Status Summaries are now hidden by default, allowing users to reveal them as needed.
4. **View by Status** - This will show you the number of courses per status including the percentage.
5. **Export** - When exporting the report, you can select either Summary, Results, or All. These are now delivered via email with the links to the reports to download in csv format only and will be accessible from your emails for seven (7) days.
 - Summary - If you select 'Summary,' the report will exclusively present the summary of the data.
 - Results - Choosing 'Results' will display the data according to the applied filters.
 - All - This will show both the summary and detailed results of the report.

First Name	Last Name	Username	Email	Department	Sub-Organisation	Course Name	Course Instance ID	Status	Access Allowed Date	Completion Date	Course Expiry Date	Accreditation Expiry Date	Progress
6	etrainu	Taylor	ettrainu@etrainu.com	QLD	Regional QLD	Workplace Compliance	23020F5D-FAD2-F165A-0F01-718D2CF8-6C302	IN PROGRESS	12 Oct 2025				0%

First ← → Last

Page 1/11

6. **Detailed Result** - This will show the detailed report based on the applied filter. By default it will display the course instance ID that can be used for the following bulk admin jobs.

- [Bulk Admin Job - Course Delete](#)
- [Bulk Admin Job - Course Expire](#)

Training Status Report (Beta)

All courses completed or in progress that were assigned in the last 30 days

x v

EDIT FILTERS (3) -

User Grouping

1

Filter By Organisation v

Organisation

etrainu - Training

2

Department

Select Department v

3

Sub-Organisation

Select Sub-Organisation v

If you click on the Edit Filter option, you will be presented with a number of options to customise the report which are outlined below.

1. **Filter By** - This option permits you to filter the report by either Organisation or Participant Group.
2. **Department** - If you select Organisation as the filter, you can also refine the report by specifying the department.
3. **Sub-Organisation** - This will allow you to narrow down the report by selecting a sub-organisation.

Note: If you opt for Participant Group, you only need to select the participant group from the dropdown menu.

To generate the report by 'Course' apply the following filters.

The screenshot displays a filter configuration interface for a report. At the top, there is a 'Training' section with a 'Filter By' dropdown set to 'Courses' (labeled 4). Below this, a 'Select Courses' section (labeled 5) shows '91 Courses Selected' and two selected status filters: 'In Progress' and 'Completed' (labeled 6). The 'Periods' section (labeled 7) has a 'Filter By' dropdown set to '1 items selected'. Underneath, the 'Date Training Was Assigned' section (labeled 8) is set to 'Last 30 days'. Finally, the 'From' and 'To' date range section (labeled 9) shows dates from '10/09/2023' to '10/10/2023'.

4. **Training - Filter By** - This option permits you to filter the report by courses or modules.
5. **Select Courses** - This option enables you to choose either all courses, specific courses, or course groups that you wish to include in the report. A Course (bundle) is the completed course itself in full (recommended); a “Course Group” refers to a Training Group which captures a group of training courses (refer to [“Training Groups”](#) to understand this functionality.)
6. **Course Status** - By default, this will be set to In Progress and Completed. However, you have the option to include Expired courses in the report.
7. **Periods - Filter By** - By default, this will be set to the date training was assigned. However, you have the option to choose from various time periods, including the user-created date and course completed date. This can now query data over longer time frames, such as the last 3 and 5 years.

Note: Longer time frames can be supported on an ad-hoc basis, but the longest time frame supported for scheduled reports will be 5 years.
8. **Date Training was assigned** - If you choose the Training Assigned Date, you can pick a specific date from the dropdown menu, which provides various timeframe options.
9. **From and to** - Alternatively, you can customise the report by specifying the start and end dates for the desired period.

To generate the report by 'Modules' apply the following filters.

The screenshot shows a report filter interface. At the top, there is a 'Training' section with a 'Filter By' dropdown set to 'Modules'. Below this is a 'Select Modules' dropdown menu (labeled 10) and a list of status filters: 'Not Started', 'In Progress', 'Awaiting Review', 'Awaiting Final Competency', and 'Completed' (labeled 11). Below the status filters is a 'Periods' section (labeled 12) with a 'Filter By' dropdown set to '1 items selected'. Underneath, there is a 'Date Training Was Assigned' dropdown set to 'Last 30 days'. At the bottom, there are 'From:' and 'To:' date pickers, with 'From:' set to '10/09/2023' and 'To:' set to '10/10/2023'.

10. **Select Modules** - This allows you to select either all modules or specific modules that you want to include in the report.
11. **Module Status** - Select the module status, which can be Not Started, In Progress, Awaiting Review, Awaiting Final Competency, or Completed. A Module (induction) is a section within a Course (bundle)
12. **Periods - Filter By** - By default, this will be set to the date training was assigned. However, you have the option to choose from various time periods, including the user-created date and course completed date. This can now query data over longer time frames, such as the last 3 and 5 years.

Note: Longer time frames can be supported on an ad-hoc basis, but the longest time frame supported for scheduled reports will be 5 years.

The screenshot shows the 'Additional Options' section of the report filter interface. It contains two checkboxes: 'Include archived users' (labeled 13) and 'Include modules' (labeled 14). Below these is a section titled 'Extra Display Fields' (labeled 15) with the instruction 'Select extra fields to include in report results'. A dropdown menu is open, showing a link 'Select All Extra Display Fields' and three options: 'DOB', 'Gender', and 'Phone', each with an unchecked checkbox.

13. **Include archived users** - Check this box to include archived users in the report.
14. **Include modules** - Check this box to incorporate modules into the report.

15. **Extra Display Fields** - This option enables you to add Date of Birth (DOB), Gender, and Phone information to the report if available.

The screenshot shows a 'Save Report' form with the following elements:

- 16 Save Report**: A header bar for the form.
- Save report on submit?
- 17 Report Name**: A text input field with the placeholder 'Provide a report name'.
- Set a schedule
- 19 Schedule Frequency**: A dropdown menu with the placeholder 'Select a schedule frequency option' and a trash icon.
- 20 Email Recipients**: A text input field with the placeholder 'Comma seperated emails address'.
- 21** Add Schedule: A button with a plus icon.
- 22** CLEAR: A button to clear filters.
- 23** SUBMIT: A button to generate the report.

16. **Save Report** - If you check this box, the report will be automatically saved, and you can select it when running future reports, with the filters pre-populated. This item only appears after you click submit and then Edit Filters.

17. **Report Name** - This is the designated name for the report.

18. **Set a Schedule** - By selecting this option, you can set up a schedule for the report.

19. **Schedule Frequency** - You can set the reporting frequency to be daily, weekly, or monthly.

20. **Email Recipients** - Input the email address to which the reports will be sent.

21. **Add Schedule** - This will allow you to set up another schedule for the report.

22. **Clear** - Use this option to remove the applied filters.

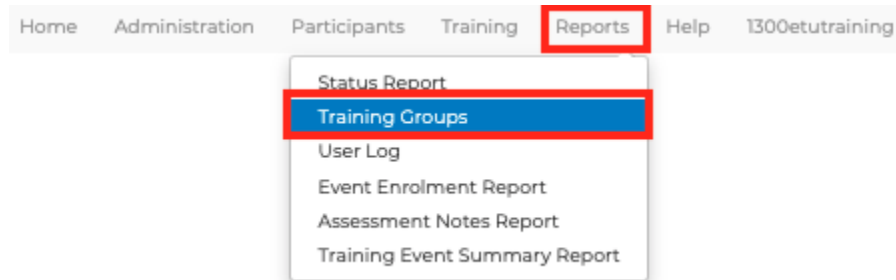
23. **Submit** - Click 'Submit' to generate the report based on the selected filters.

Note: To obtain your report, simply click the Export button located right above the detailed results table, and it will be sent to your email.

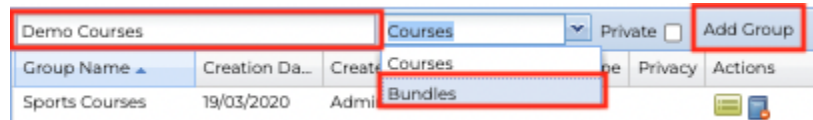
Training Groups

The Training Groups feature allows an administrator to group a number of training bundles together to pull one report rather than a separate report for each bundle. This feature is widely used within organisations that have specific compliance course requirements.

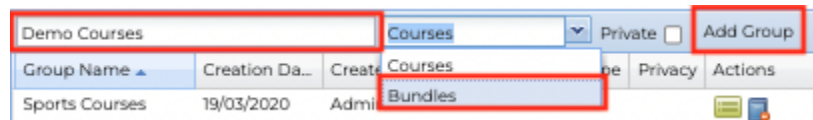
1. Click “Reports” from the menu bar on the top of the screen, followed by “Training Groups”.



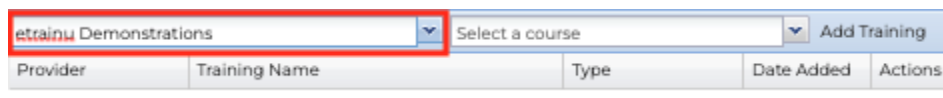
2. In “Group Name”, type the name of the Training Group you wish to create.
3. Select “Bundles” from the Courses drop-down menu.
4. Click the “Private” button if you want this to remain a private group for your use only—leaving this unticked will mean all administrators can access this Training Group.



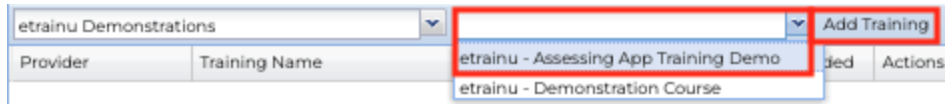
5. Select “Add Group”.
6. To add training bundles into the Training Group, click on the “View Training” icon beside the Training Group you wish to edit.



7. From here, select the content provider that supplies content to your organisation by selecting from the “Select a Provider” drop-down menu.

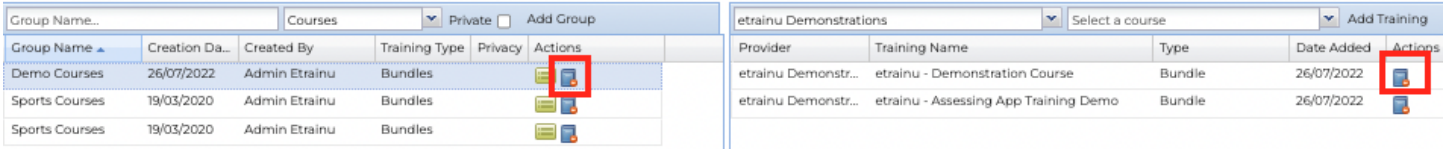


8. Select the course you wish to add to the group by selecting a course from the “Select a course” drop-down menu and click “Add Training”.




9. Repeat this process until all training items are added to the group.

10. If, at any point, you wish to remove a training item from the group or remove the group completely, click the “archive” icon.




User Log Report


A User log report allows you to report on a user/participant's login history.

 User Log Report

1 Department

1 SubOrganisation

2 From Date: 
Enter in the format dd/mm/yyyy.

2 To Date: 
Enter in the format dd/mm/yyyy.

3 Name
Enter a name to search in Username, First name, Last name or email

4

Username	First Name	Last Name	Email	Login Date	Logout Date
maryjane	Mary	Jane	admin@etrainu.com	10:41 27/07/2022	
maryjane	Mary	Jane	admin@etrainu.com	11:34 26/07/2022	
maryjane	Mary	Jane	admin@etrainu.com	10:53 25/07/2022	
maryjane	Mary	Jane	admin@etrainu.com	09:34 25/07/2022	10:40 25/07/2022
maryjane	Mary	Jane	admin@etrainu.com	10:36 22/07/2022	
maryjane	Mary	Jane	admin@etrainu.com	10:35 22/07/2022	
maryjane	Mary	Jane	admin@etrainu.com	08:46 22/07/2022	

5

- Department/Sub-Organisation:** These fields are optional, however you can advise the data to pull from.
- Department:** Advise the Department to pull data for a specific Department you have access to.
- Dates:** Advise dates for when you want to narrow your search down.
- Search:** Click "Search" to obtain your results.
- Export to Excel, CSV or PDF:** Download your report.

CPD Report

The CPD report outlines the CPD Points credited to a user/participant's account on the courses completed. This information will only be visible if your courses have the CPD functionality set-up.

CPD Report

Member Group - Select a member group

Reporting For: etrainu - Training
(when nothing else selected)

Department

Sub Organisation

Courses - Select a course

Course

Date Course was Completed

Report Results

Email	Firstname	Lastname	UserName	CPD Points Total
mark.smith@etrainu.com	Mark	Smith	mark.smith.etu	1

1. **Department / Sub-Organisation:** Advise the Department to pull data for a specific Department and/or your Sub-Organisation you have access to.
2. **Courses:** Select the course or courses you wish to report on.
3. **Date Course was Completed:** You can filter the report based on the date range your users completed their course.

This report can be exported to Excel, CSV or PDF

Event Enrolment Report

The Event Enrolment report outlines the events and the status the Participant is enrolled into. To build your report, consider the following filters:

The screenshot shows the 'Event Enrolment Report' interface. On the left, there are six filter sections, each with a numbered callout box (1-6):

- 1. ORGANISATION: etrainu - Training
- 2. DEPARTMENT *: Select department
- 3. SUB-ORGANISATION: Select sub-organisation
- 4. PARTICIPANT GROUP: OR, Select participant group
- 5. COURSES *: Select training
- 6. DATE TRAINING WAS ASSIGNED *: Select a date range

On the right, there is a 'LOAD REPORT' section with a dropdown arrow. Below it is a 'Report Filters' summary:

- Organisation: etrainu - Training
- Department *: No filter selected
- Sub-organisation: No filter selected
- Courses: No filter selected
- Date Training Was Assigned *: No filter selected

At the bottom right, there are three callout boxes (7-9) pointing to:

- 7. A checkbox labeled 'Save report on submit?'
- 8. A green button labeled 'DOWNLOAD CSV'
- 9. A green button labeled 'SUBMIT'

1. **Organisation:** This defaults to your Organisation.
2. **Department:** Advise the Department to pull data for a specific Department you have access to.
3. **Sub-Organisation:** This field is optional, however you can advise the Sub-organisation to pull data for a specific Sub-organisation you have access to.
4. **Participant Group:** This field is also optional, however you can now include a Participant Group to your report as an option.
5. **Courses:** Select the course or courses you wish to report on.
6. **Date Training was Assigned:** You can filter the reports based on past, present and future dates, etc.
7. **Save Report:** You also have the option to save the report on the left. This functionality allows you to save the report (so you don't have to complete the above fields next time) and also set a schedule to have the report sent to a nominated email address.
8. **Download CSV:** You can download the report to CSV once you click Save & Submit and the results appear.
9. **Save & Submit:** Click this to save and create your report.

Assessment Notes Report

The Assessment Notes report outlines the notes advised when a Participant is assessed through the assessing app. To build your report, consider the following filters:

Assessment Notes Report ⓘ

1 ORGANISATION etrainu - Training

2 DEPARTMENT Select department

3 SUB-ORGANISATION Select sub-organisation

4 PARTICIPANT GROUP OR Select participant group

5 COURSES * Select training

6 DATE TRAINING WAS ASSIGNED * Select a date range

7 PARTICIPANT Select participant

LOAD REPORT

Report Filters

Organisation
etrainu - Training

Department
No filter selected

Sub-organisation
No filter selected

Courses *
No filter selected

Date Training Was Assigned *
No filter selected

Participant
No filter selected

Save report on submit? 8

9 DOWNLOAD CSV 10 SUBMIT

1. **Organisation:** This defaults to your Organisation.
2. **Department:** Advise the Department to pull data for a specific Department you have access to.
3. **Sub-organisation:** This field is optional, however you can advise the Sub-organisation to pull data for a specific Sub-organisation you have access to.
4. **Participant Group:** This field is also optional, however you can now include a Participant Group to your report as an option.
5. **Courses:** Select the course or courses you wish to report on.
6. **Date Training was Assigned:** You can filter the reports based on a variety of date ranges from in the past, present or future
7. **Participant:** This field is optional, however, you can advise a Participant you wish to report on.
8. **Save Report:** You also have the option to save the report on the left. This functionality allows you to save the report (so you don't have to complete the above fields next time) and also set a schedule to have the report sent to a nominated email address.

9. **Download CSV:** You can download the report to CSV once you click Save & Submit and the results appear.
10. **Save & Submit:** Click this to create your report.

Training Event Summary Report

The Assessment Notes report outlines information about a Participant for an event assessed through the assessing app. To build your report, consider the following filters:

1. **Organisation:** This defaults to your Organisation.
2. **Department:** Advise the Department to pull data for a specific Department you have access to.
3. **Sub-organisation:** This field is optional, however you can advise the Sub-organisation to pull data for a specific Sub-organisation you have access to.
4. **Participant Group:** This field is also optional, however you can now include a Participant Group to your report as an option.
5. **Courses:** Select the course or courses you wish to report on.

6. **Event Start Date:** You can filter the report based on a variety of date ranges from in the past, present or future.
7. **Event Status:** Select the event status types you would like to obtain the data from.
8. **Participants:** This field is optional, however, you can advise a Participant you wish to report on.
9. **Assessors:** This field is optional however, you can advise an assessor who managed the event you wish to report on.
10. **Save Report:** You also have the option to save the report on the left. This functionality allows you to save the report (so you don't have to complete the above fields next time) and also set a schedule to have the report sent to a nominated email address.
11. **Download CSV:** You can download the report to CSV once you click Save & Submit and the results appear.
12. **Save & Submit:** Click this to create your report.

Active User Report

This report provides you a list of all users under your organisation.

Active User Report ⓘ

1	ORGANISATION	etrainu (RTO #31345)	
2	DEPARTMENT	Queensland	x v
	SUB-ORGANISATION	Select sub-organisation	v
3	USER CREATED DATE RANGE	Last 365 days	x v
		FROM: 08/02/2021	TO: 08/02/2022
4	USER LOGGED IN DATE RANGE	Select a date range	v
5	ADDITIONAL OPTIONS	<input checked="" type="checkbox"/> INCLUDE ARCHIVED USERS	

6 **SUBMIT**

- 1. Organisation:** This defaults to your Organisation.
- 2. Department / Sub-Organisation:** Advise the Department to pull data for a specific Department and/or your Sub-Organisation you have access to.
- 3. User Created Date Range:** You can filter the report based on the date range your users was created.
- 4. User Logged in Date Range:** You can filter the report based on the date range your users logged in.
- 5. Additional Options:** You can choose to include users that have been archived.

Course Purchase Report

This report outlines all purchases made through to your organisation within the etrainu LMS. This report is only accessible by Org Level Administrators.

Course Purchase Report ⓘ

1	ORGANISATION	etrainu - Training
2	DEPARTMENT	Select department ▼
3	SUB-ORGANISATION	Select sub-organisation ▼
4	COURSE	Select training ▼
5	COURSE PURCHASE DATE *	Select a date range ▼
6	PURCHASED FOR PARTICIPANT NAME	Select participant ▼
7	COUPON	

8 SUBMIT

1. **Organisation:** This defaults to your Organisation.
2. **Department:** Advise the Department to pull data for a specific Department.
3. **Sub-Organisation:** Advise the Sub-Organisation to pull data for a specific Sub-Organisation.
4. **Course:** You can filter the report based on the course purchased.
5. **Course Purchase Date:** You can filter the report based on the date range the course was purchased.
6. **Purchased for Participant Name:** You can filter the report by a Participant Name.
7. **Coupon:** You can filter the report by the Coupon used.
8. **Submit**

This report includes a variety of information as noted below:

- The date of transaction
- The course cost, tax, transaction cost, and whether a coupon was used for each individual transaction.
- Personal details including who purchased the course (therefore, you can identify when an administrator has assigned the course for the participant, as well as when the participant has purchased the course themselves). The username who purchased the course and the group they belong to, and the user type.

Date	Course Cost	Tax	Transaction Cost	Coupon Code	Purchased By Name	Purchased By Username	Purchased By Group	Purchased By Type
21/09/2023 15:34:22	31.82	3.18	35.00	Etrainu Assigned	Admin Etrainu	1300mayfaircs	Mayfair Care and Support	Organisation Admin.
21/09/2023 15:34:22	31.82	3.18	35.00	Etrainu Assigned	Admin Etrainu	1300mayfaircs	Mayfair Care and Support	Organisation Admin.
21/09/2023 15:34:21	31.82	3.18	35.00	Etrainu Assigned	Admin Etrainu	1300mayfaircs	Mayfair Care and Support	Organisation Admin.
21/09/2023 15:32:19	31.82	3.18	35.00		Participant Etrainu	Participant.mcs		Participant.

- The course allocated and which participant it was allocated to (including their organisation, department, sub-organisation, and the supplier name).

Bundle Name	Purchased For Participant Name	Purchased For Participant Organisation	Purchased For Participant Department	Purchased For Participant Sub-Organisation	Supplier Name
The Impact of Barriers on People Living with Disability	Sarah Higgins	Mayfair Care and Support	Demo	Demo	NDS Courses
The Impact of Barriers on People Living with Disability	Toby Hall	Mayfair Care and Support	Demo	Demo	NDS Courses
The Impact of Barriers on People Living with Disability	Tom Grey	Mayfair Care and Support	Demo	Demo	NDS Courses
The Impact of Barriers on People Living with Disability	Participant Etrainu	Mayfair Care and Support	Demo	Demo	NDS Courses

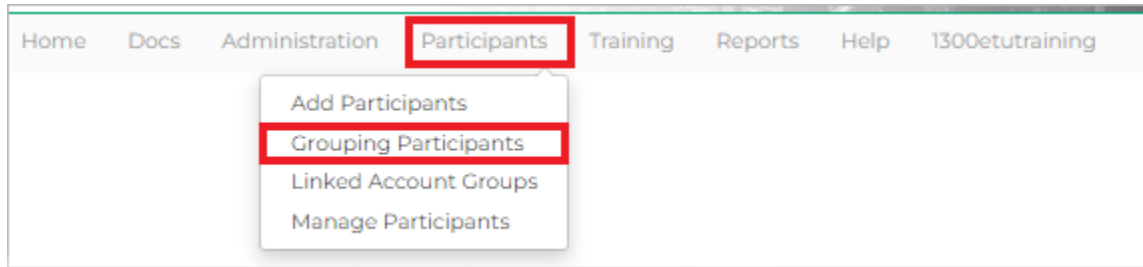
- The actual invoice can also be downloaded direct from this report- this means if needed for your records, or if a participant requests a copy, you can now self-service and download the invoice record direct from this report. Additionally, the report includes details such as the transaction ID, transaction status, and the course assignment status.

Transaction Id	Transaction Status	Invoice	Course Assigned ⓘ
ETU-adyen-EiQ4SLHV1iQq16wJtiwqN	Free	Invoice	True
ETU-adyen-EiQ4SLHV1iQq16wJtiwqN	Free	Invoice	True
ETU-adyen-EiQ4SLHV1iQq16wJtiwqN	Free	Invoice	True
ETU-adyen-bm7AyDLEWZHx1EBw_R8Sd	Success	Invoice	True

Participant Groups

Similarly to the Training Group, the Participant Group feature allows you to group Participants together. This may be done on an individual Participant basis or a sub-organisation basis.

1. Click “Participants” from the menu bar on the top of the screen, followed by “Grouping Participants”.



2. Select “Add a New Group”

Manage Participant Groups

Group Name Contains

[+ Add a New Group](#) [Archived Participant Grouping](#)

3. Name the Participant Group you are creating, select yes/no responses in accordance with your requirements and click “Save”.

Participant Group Information

Name *

Assigned Group

Auto-Add new Participant Yes No
Add participants to this grouping when a training partnership is established with the assigned group or groups belonging to the assigned group

Participants can Join/Leave Yes No
Allow participants to choose to be a part of this group

Include In Reports Yes No
Include this grouping in reports

Include In Totals Yes No
Include this grouping in reporting totals

Children Can Access Yes No
Allow Administrators in lower levels to view and use this Participant group

Created By 1300etutrainig

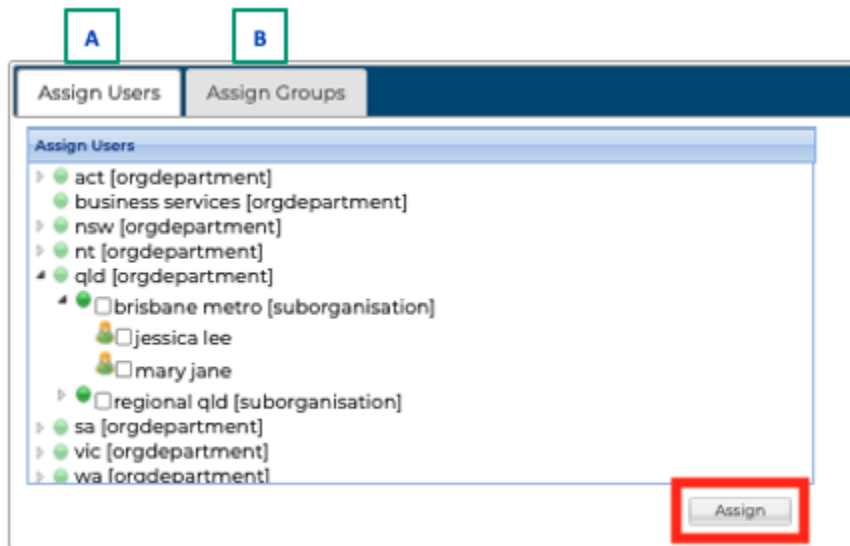
Created 19/03/2020

Fields marked with a * are required.

4. To add Participants to the group, click the “plus” icon.

Group Name	Assigned to	Include In Totals	Include In Reports	Created By	Creation Date
 QLD Participants	etrainu - Training	✓	✓		19/03/2020

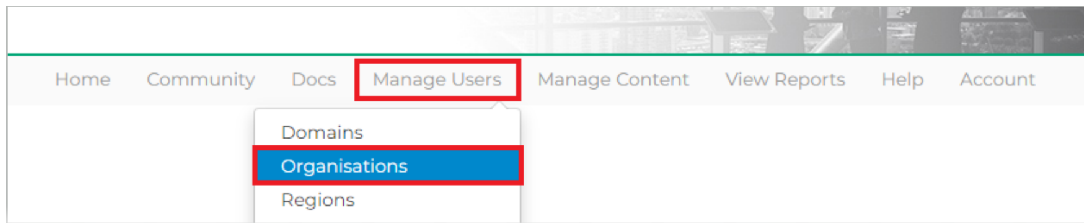
5. From here, you are greeted with two options: Assign Users and Assign Groups. Select the users or groups and click “Assign”.
- a. If you are assigning users, select the individual users you wish to assign to the Participant Group—by using this option, it will not automatically add new users as they are created.
 - b. If you are assigning groups, select the Department/Sub-organisation you wish to assign to the Participant Group—by using this option, it will automatically add new users as they are created within those Department/Sub-organisations.



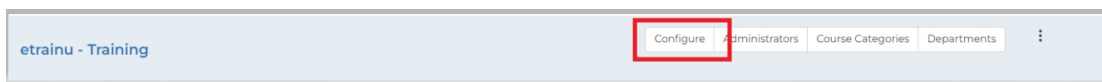
Setting default sub org for new users

To set up a default sub-org within an organisation for new users follow the steps below:

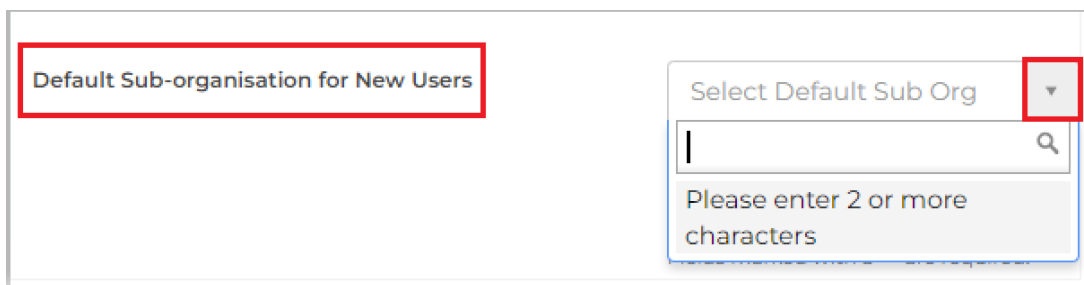
1. Click “Manage Users”, followed by “Organisations”.



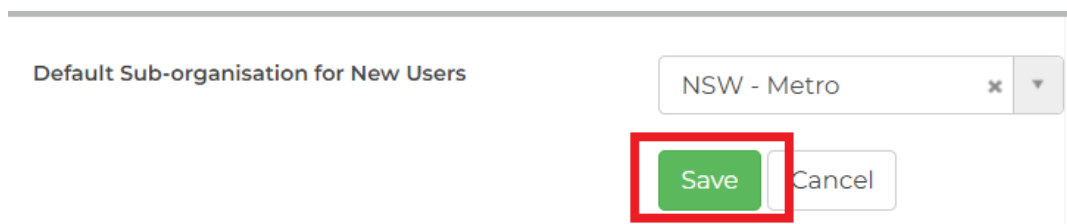
2. Search for the organisation and click “Configure”.



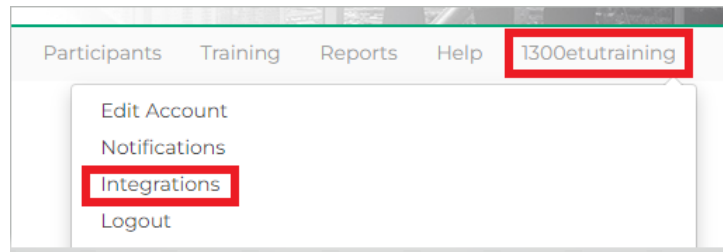
3. Scroll down and click on the drop down arrow to select the default sub org.



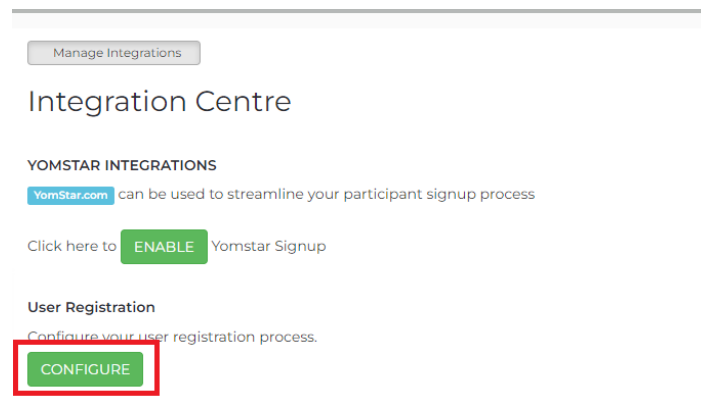
4. Once done, click on Save.



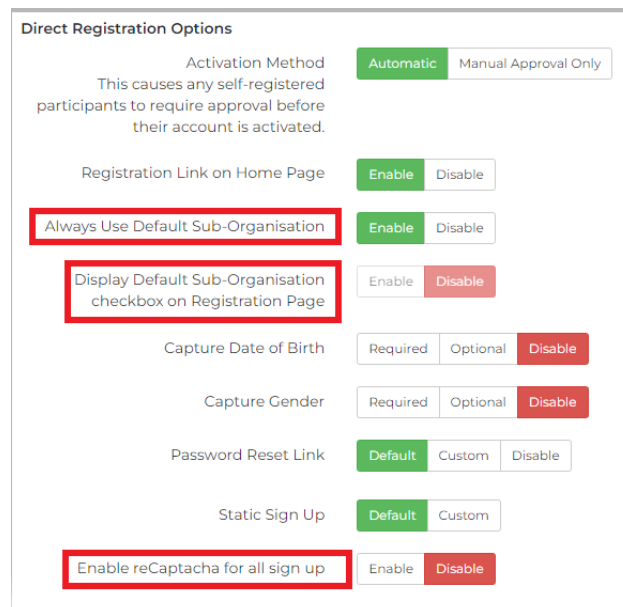
- Once the default sub-organisation has been selected, admins can go to Integrations to configure the user registration by going to Integrations.



- Then click on configure.



- Admins can enable/disable the default sub-organisation upon signing up. Also, reCAPTCHA has been added in the sign up process to enhance security.



8. Once default sub-organisation has been enabled. New users will be automatically added to the selected sub-organisation.

The image shows a user creation form with the following fields and elements:

- Email:** A text input field.
- Username:** A text input field containing the value "jona.obillo.etutaining".
- First Name:** A text input field.
- Last Name:** A text input field.
- Password:** A password input field showing "*****". Below it is a strength indicator bar labeled "Strong".
- Password Instructions:** A light blue box containing the text: "Please create a 'Strong' password by ensuring your password has a minimum of 8 characters and contains at least 3 of the following 4":
 - English upper case;
 - English lower case;
 - Numeric characters (0 through 9);
 - Non-alphabetic printable characters
- Region:** A dropdown menu with "NSW" selected.
- Location:** A dropdown menu with "NSW - Metro" selected. This field is highlighted with a red rectangular border.
- Checkbox:** An unchecked checkbox labeled "I don't know my Location".
- Buttons:** Two green buttons at the bottom: "BACK" and "CREATE".

FAQs and Support

Within our etrainu Support Centre, we have a range of helpful articles and training videos available to help you with any questions or concerns you may have while you complete your training.

It is always recommended that, if you are completing training via an organisation, you reach out to your System Administrator first.

However, if you are unable to have your questions answered, please see below helpful links.

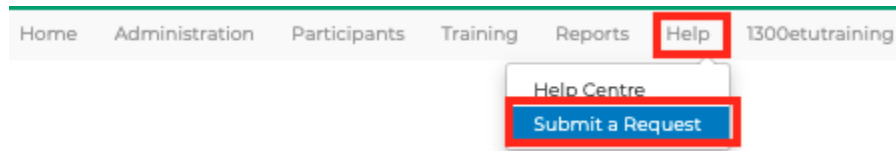
The etrainu Support Centre

To access the Support Centre, click on the link below:

<https://etrainusupport.zendesk.com/hc/en-us>

Contact Us

To log a ticket with our Help Desk, click on “Help” from the menu bar on the top right, followed by “[Submit a Request](#)”.



Please allow up to 2 business days for a response.