etrainu

ADMINISTRATOR USER GUIDE

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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.

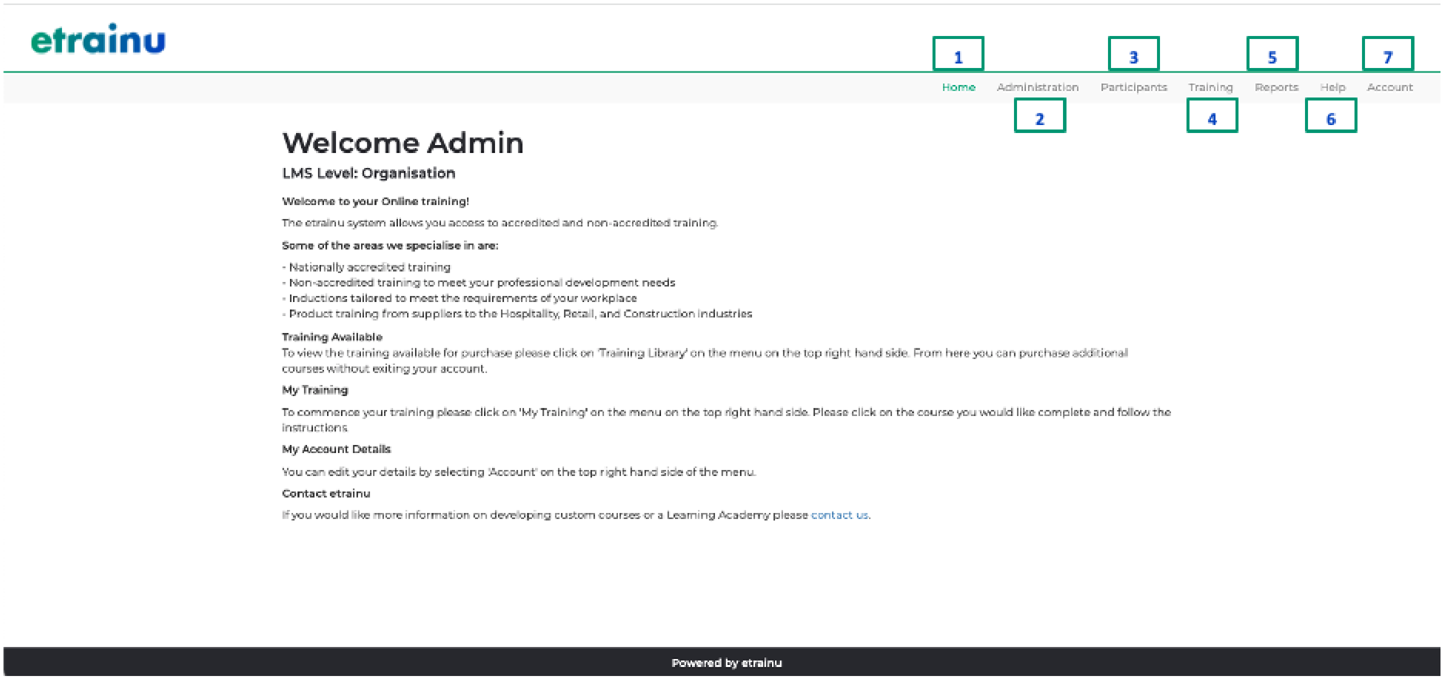
Here at etrainu, we offer a range of both accredited and non-accredited training across a vast number of industry sectors. These include hospitality and tourism, disability services, mining and construction, sporting, health and wellbeing, business and more being added daily! To view the full range of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



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.

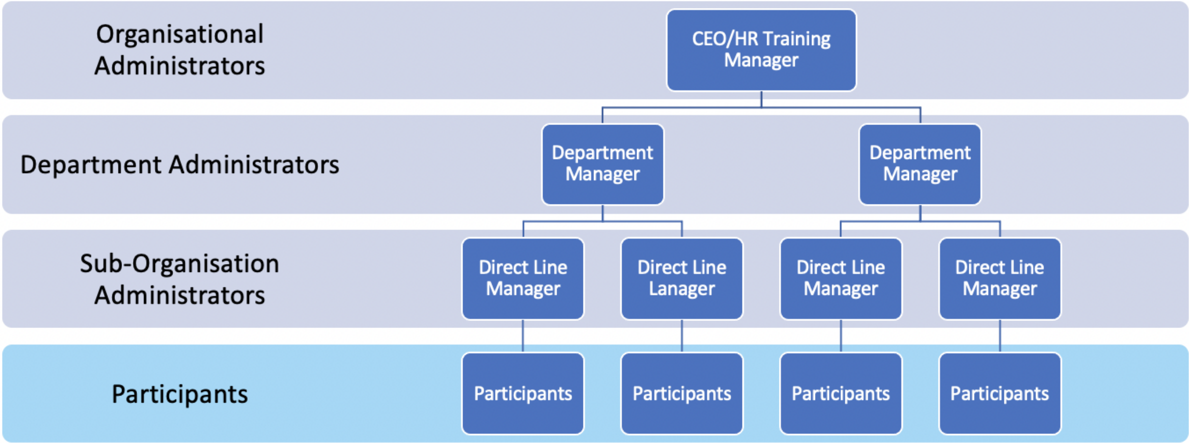
6. **Help:** This section will take you to our Support Centre and Help Desk. If you have a question, you can use this to browse a range of articles and videos to help you troubleshoot, or raise a ticket with our Help Desk team.

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.

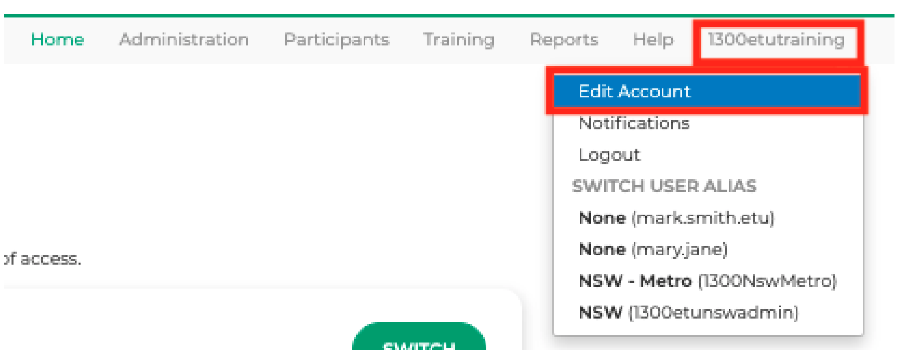
1. When you reach the login page, enter your login credentials and click "Log in".

2. If you are unsure of your credentials, please check your inbox, including spam folders or contact your system administrator.

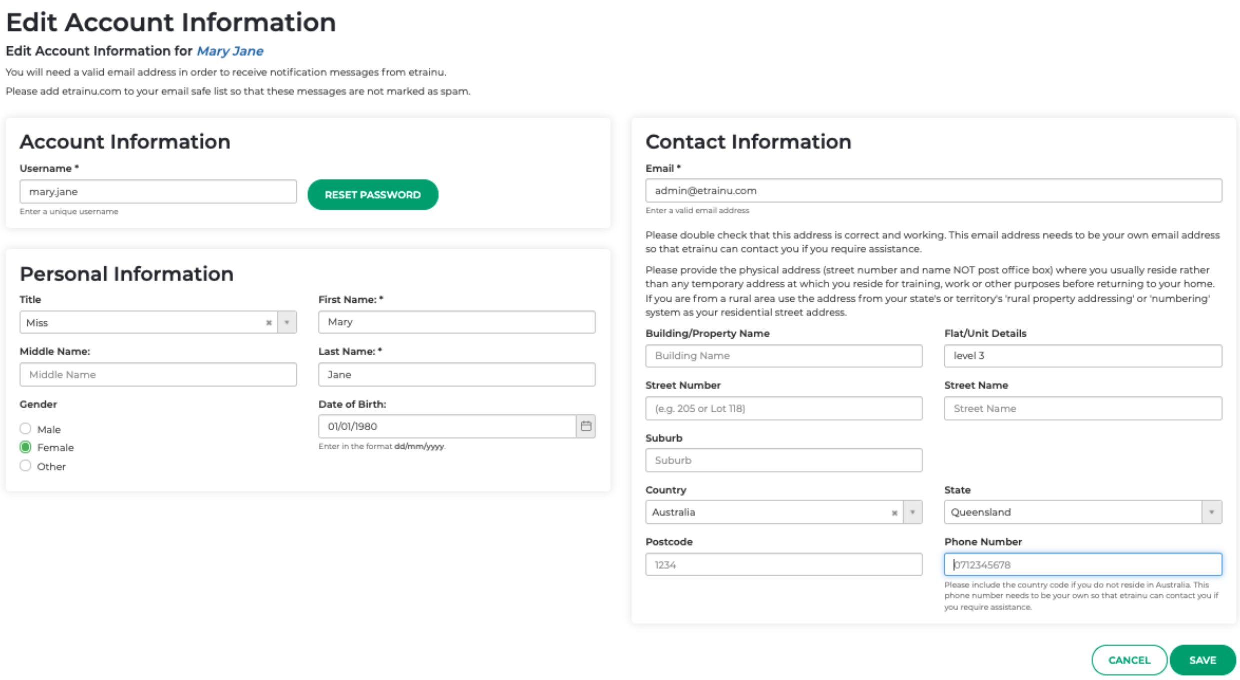
Managing your Personal Details

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.



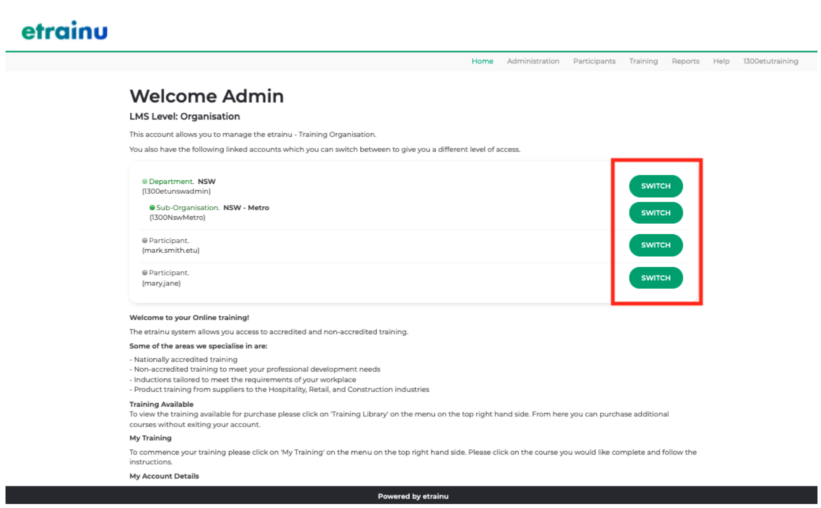
2. Make the required adjustments to your account information and click “Save”.



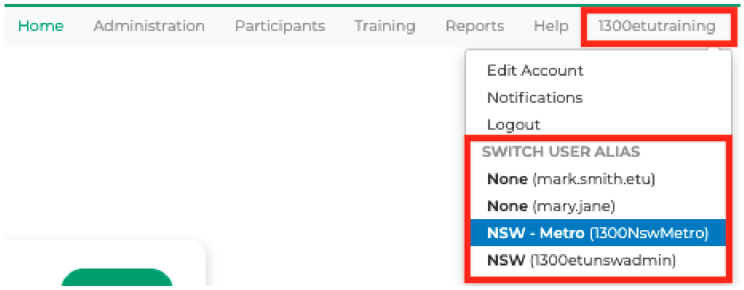
Switching between your Accounts

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.



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

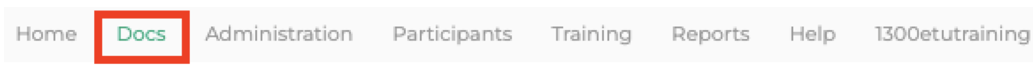


Note: *You can switch back into any account when you have logged in*

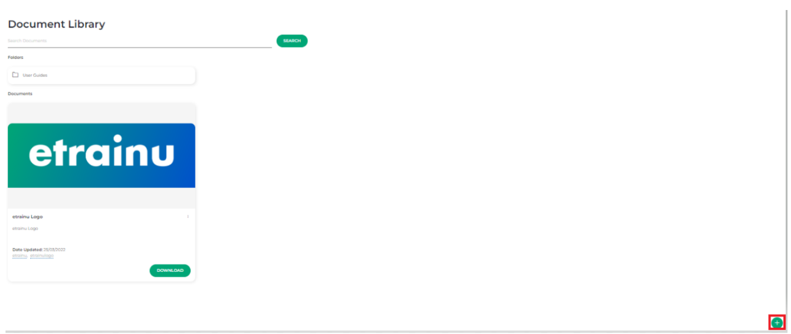
Document Library

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

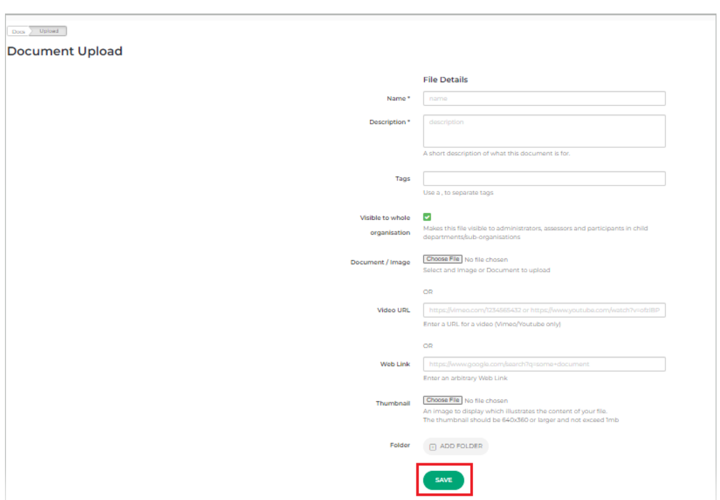
1. Click on "Docs".



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



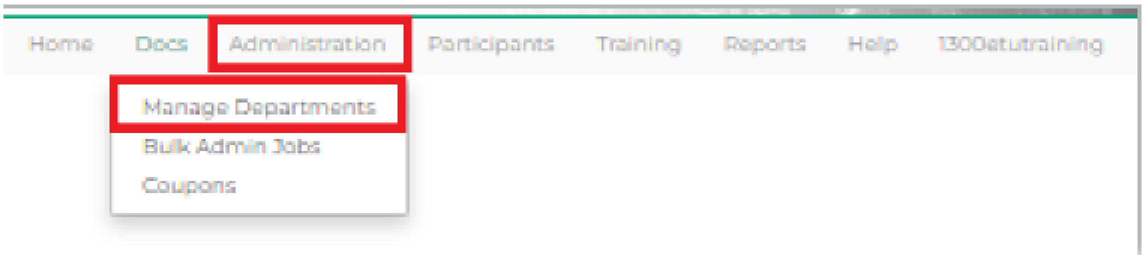
3. Complete the fields and upload a document and thumbnail and click "Save".



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”.

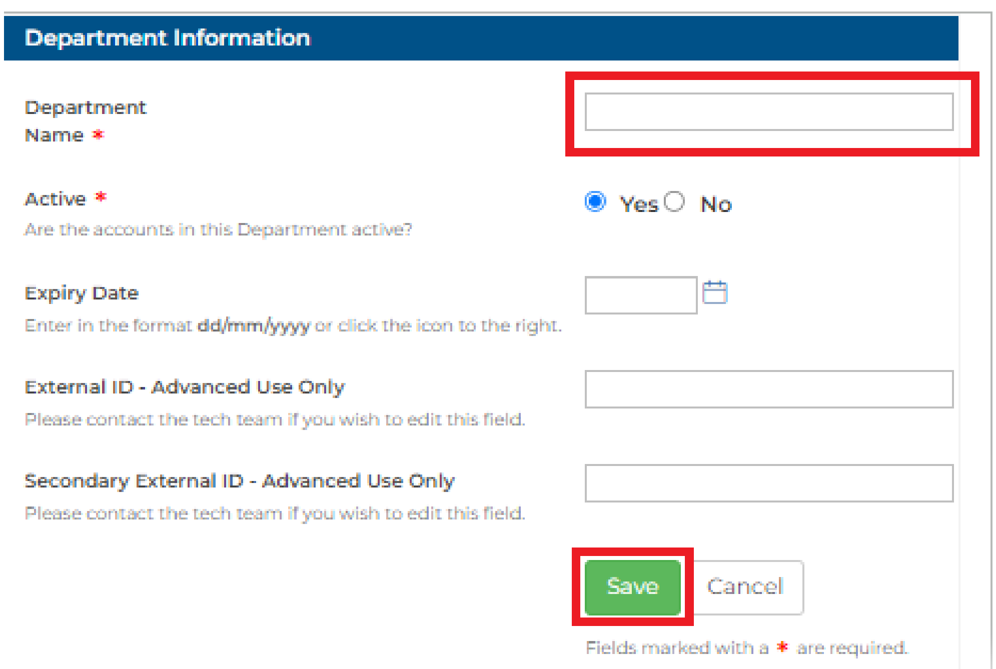
1. Click on “Administration”, then select “Manage Departments”.



2. Click on “Add a New Department”.

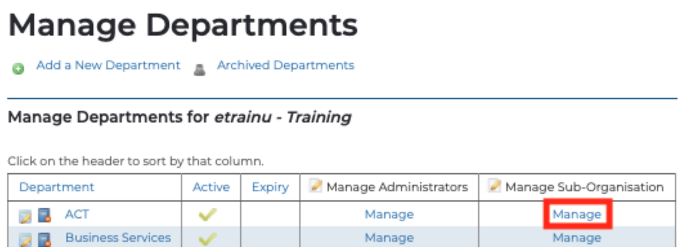
3. Enter in the department name and click “Save”.

   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.



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.

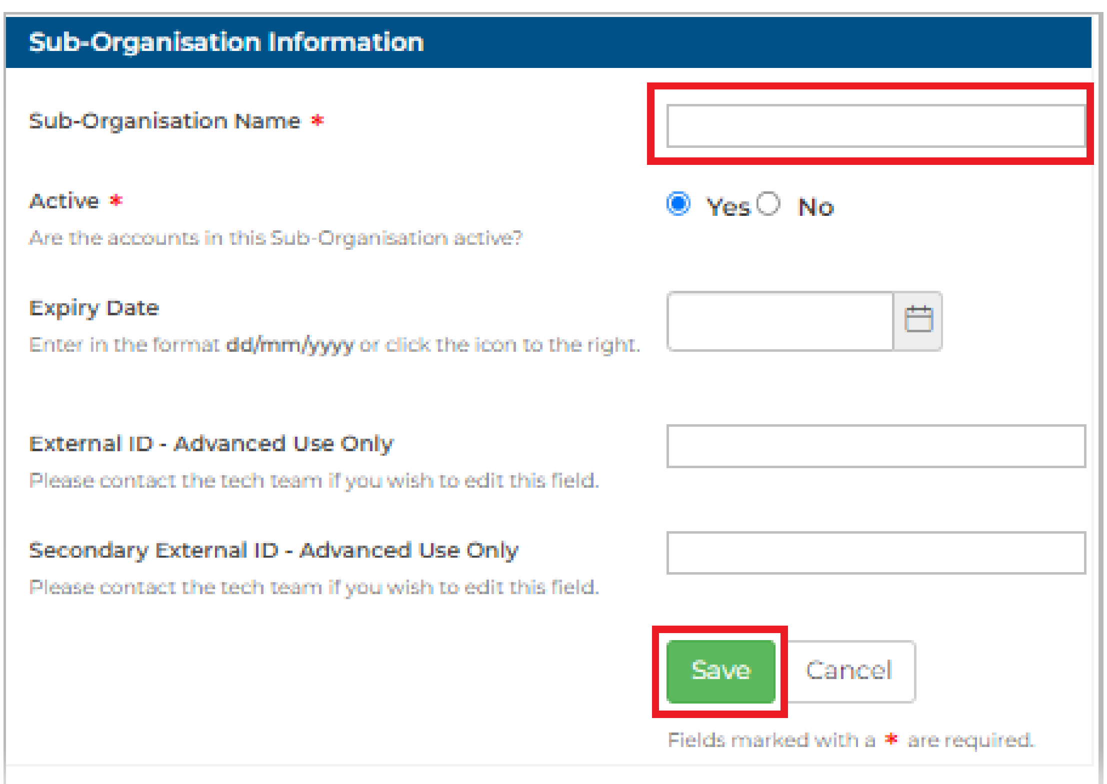
4. In the same “Manage Departments” screen, locate the department you wish to create a sub-organisation for and click on “Manage” under the “Manage Sub-Organisations” column.



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

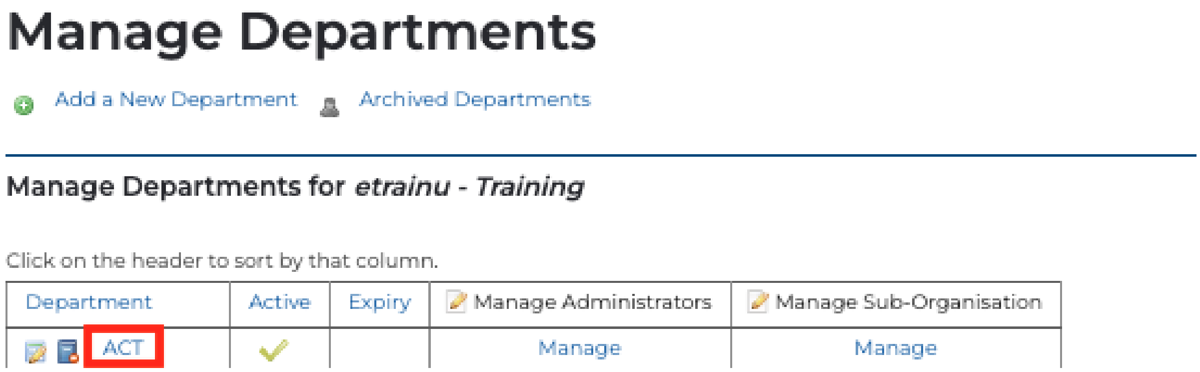
6. Enter in the sub-organisation name and click “Save”.

   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.

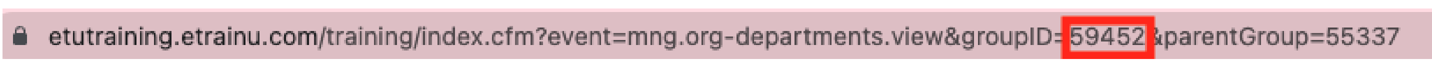


Obtaining a Groupid for a Department

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



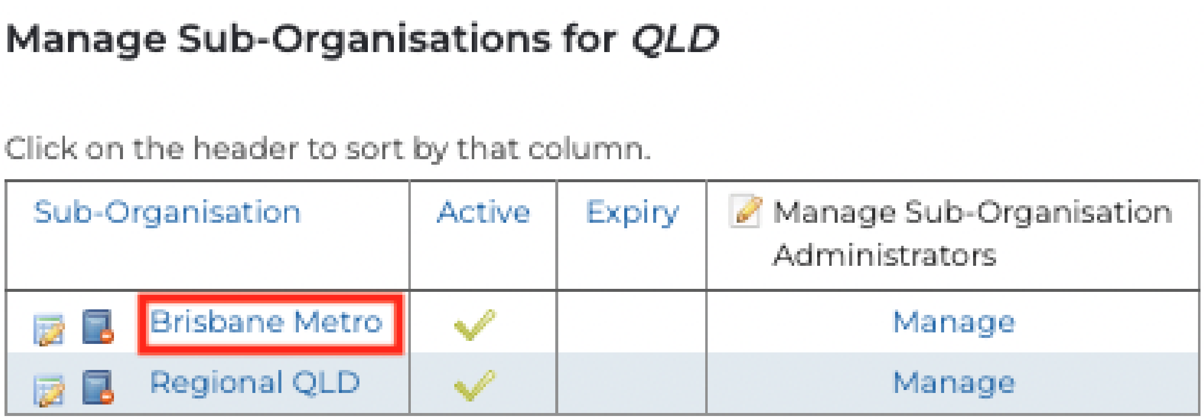
2. In the address bar (URL) copy the GroupID.



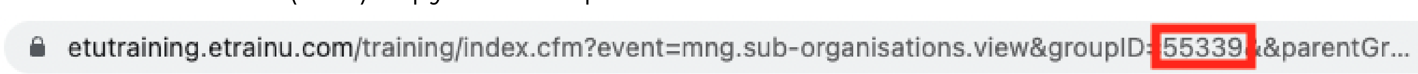
Note: The GroupId is used for admin imports in the system.

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).



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



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

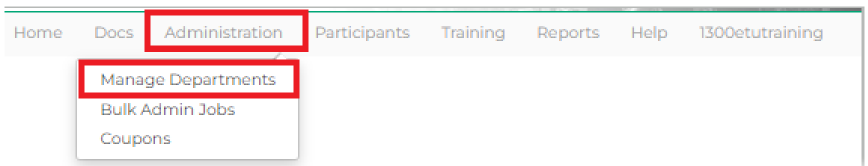
Creating an Org Administrator Account

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

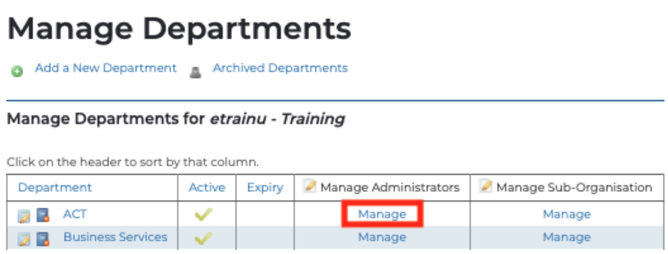
Creating a Department Administrator Account from an Org Administrator account

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

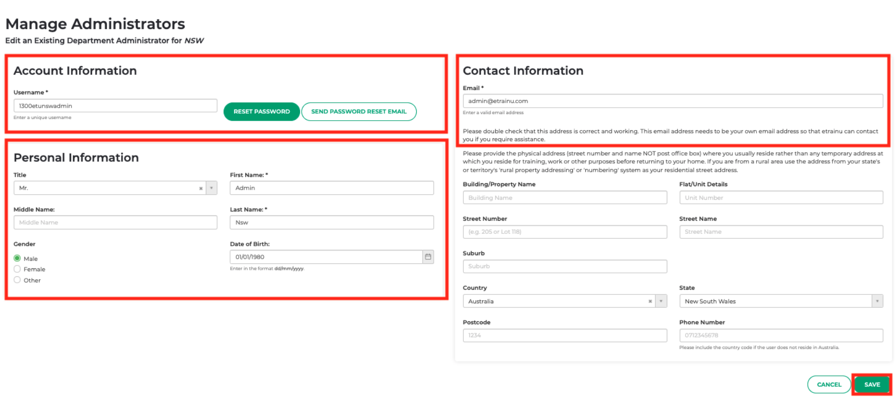
1. Click on “Administration”, then select “Manage Departments”.



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



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

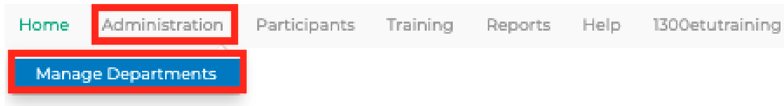


Note: When creating admin accounts, users should include identifiers like ".admin" since usernames are unique identifiers and cannot be used twice. Additionally, administrators can only be created for levels subordinate to their own and only those with organisation administrator access can create this.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

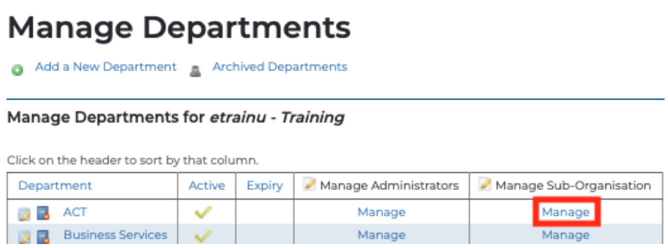
Creating a Sub-organisation Administrator Account from an Org Administrator account

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

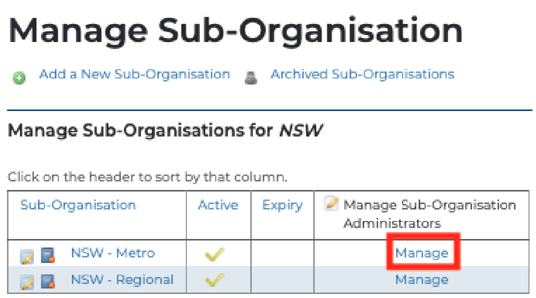
1. Click on “Administration”, then select “Managed Departments”.



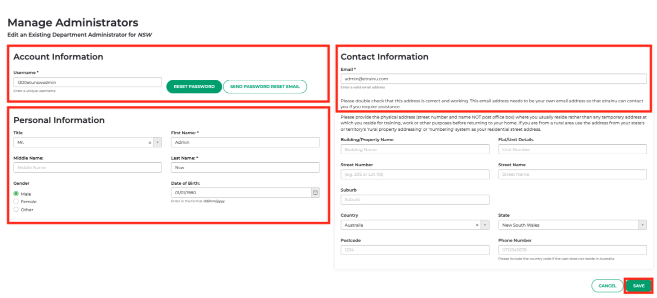
2. Find the Department and click “Manage” under “Manage Sub-organisation”.



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



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

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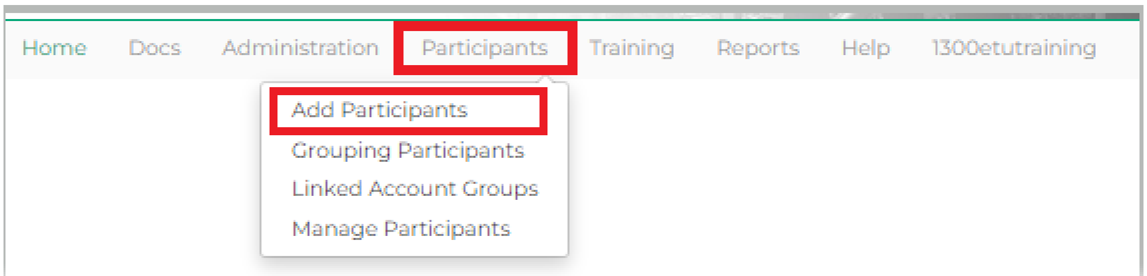
Creating a Participant Account

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”.



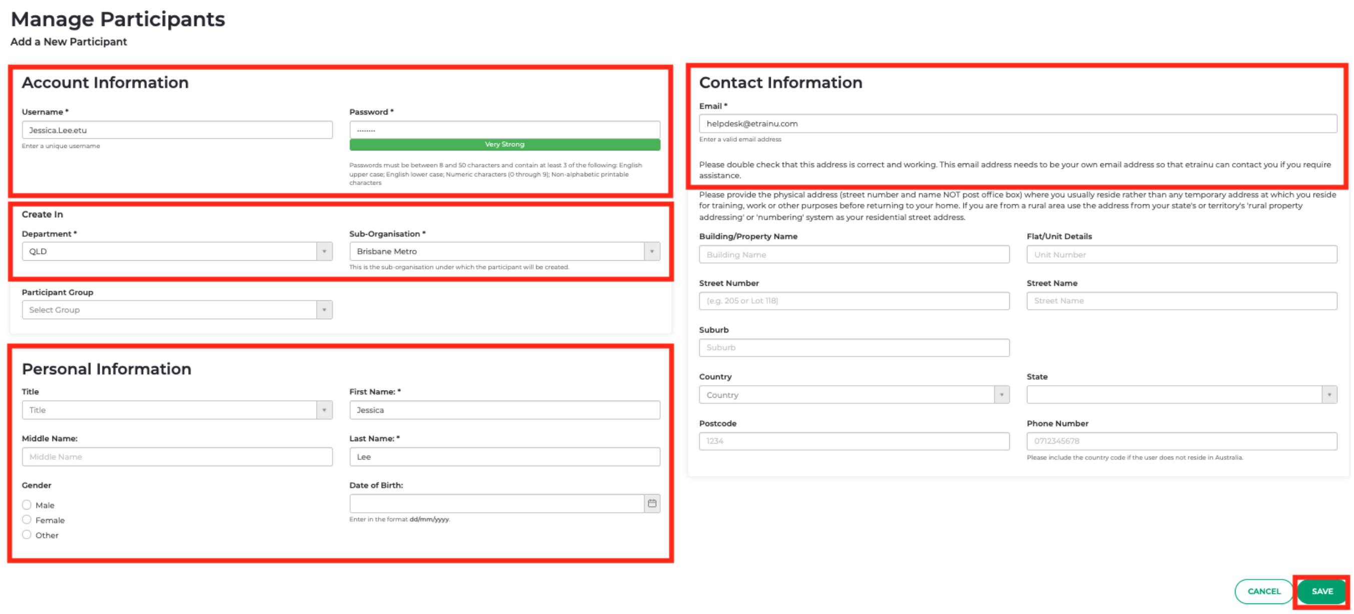
2. Fill in the Manage Participants screen to create a participant account.
   Please note you will need to enter at minimum all mandatory information marked with an asterix *.

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.

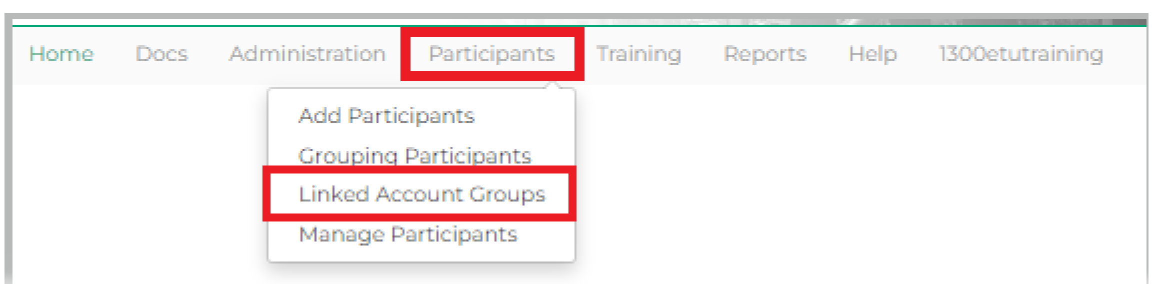


Creating a Linked Account

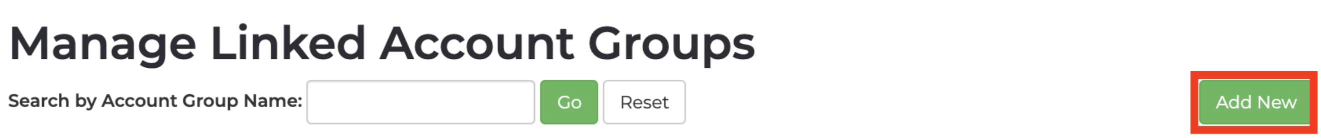
A linked account group allows someone with multiple accounts types to switch between these without having to log out and log in each time they need to move between them. Typical switch links will include Participant, Administrator, Supplier (Training Admin) or Assessor.

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**".



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

Find Accounts to Add

Name

Admin

Search

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

4. 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	+

5. 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	1300etutraining	etrainu - Training	Org Admin	
Admin	Nsw Metro	1300NswMetro	NSW - Metro	Sub-org Admin	
Mary	Jane	mary.jane	Brisbane Metro Participants	Participant	
Mark	Smith	mark.smith.etu	NSW - Metro Participants	Participant	
Admin	Nsw	1300etunswadmin	NSW	Department Admin	

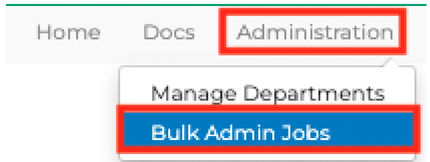
Done

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

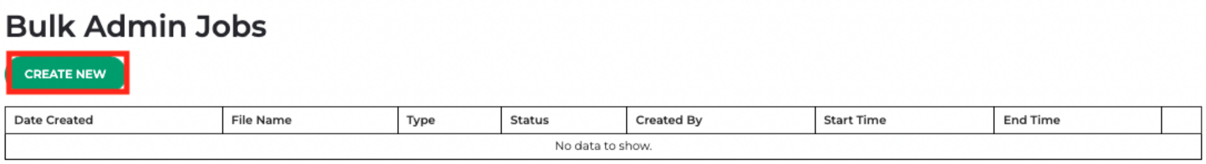
Bulk Admin Job

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”.

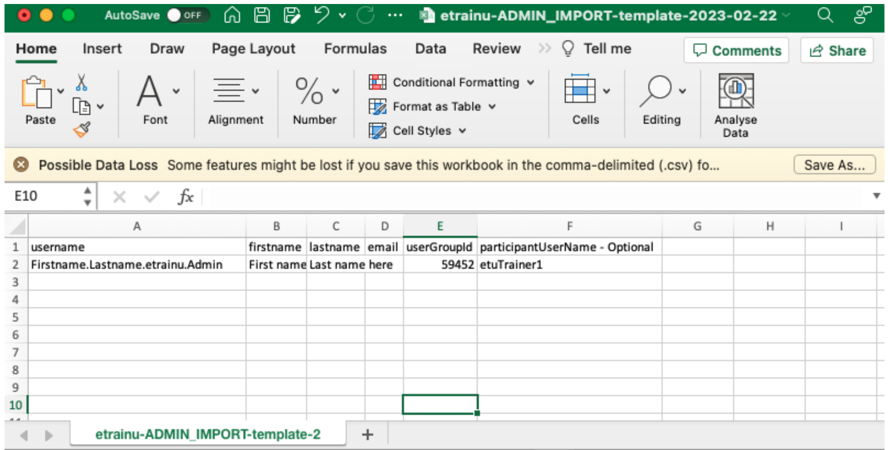


Bulk Admin Job - Admin Import

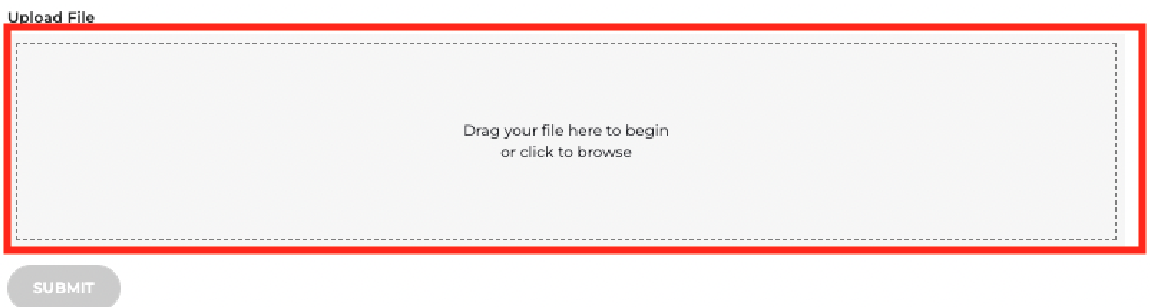
To create additional admin accounts for your organisation into one follow the steps below:

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.Orgname.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".

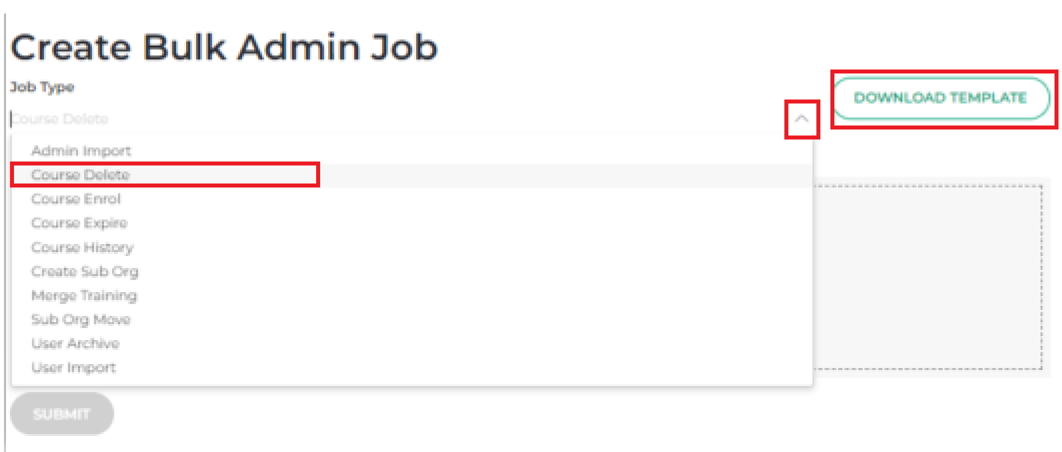
Notes:

- 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.

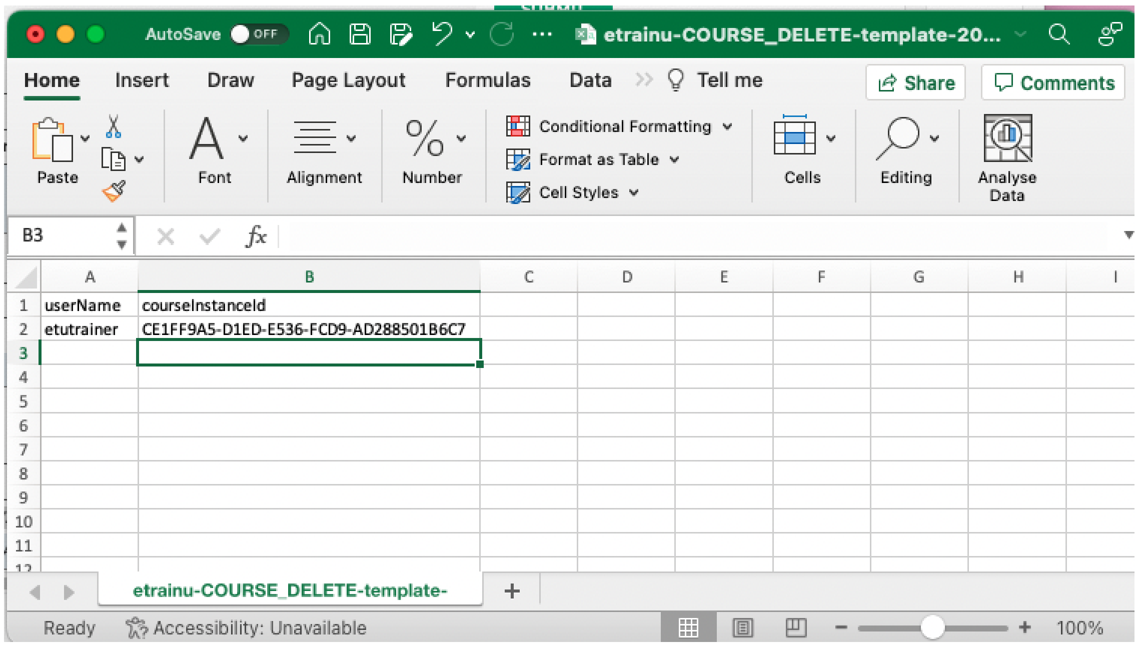
Bulk Admin Job - Course Delete

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

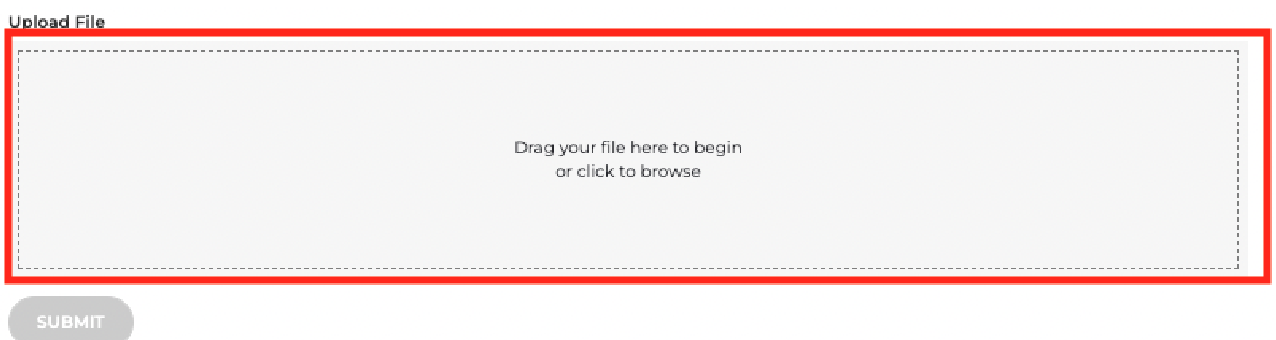
1. Click the arrow and select "Course Delete" then select "Download Template".



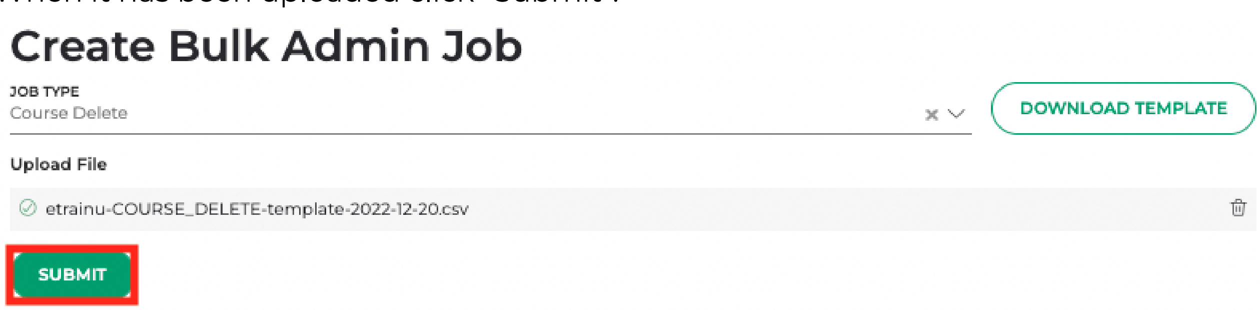
2. When you open the template enter the username of the account and enter the "courseInstanceId". This can be found when you obtain a [Training Status Report](#) (under "Extra Display Fields").



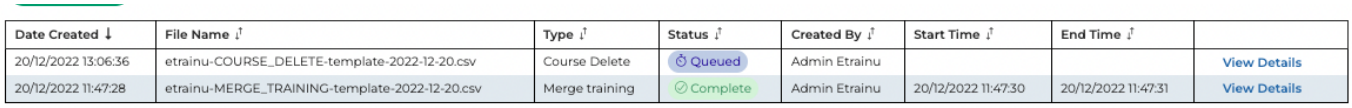
3. Save your CSV and upload or drag it into the box below.



4. When it has been uploaded click "Submit".



5. 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:

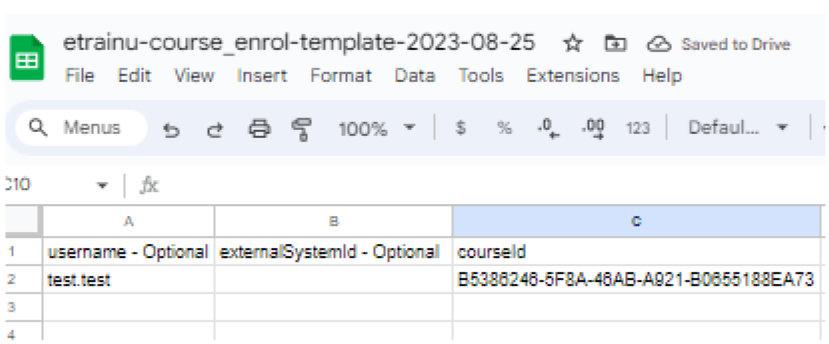
- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

Bulk Admin Job - Course Enrol

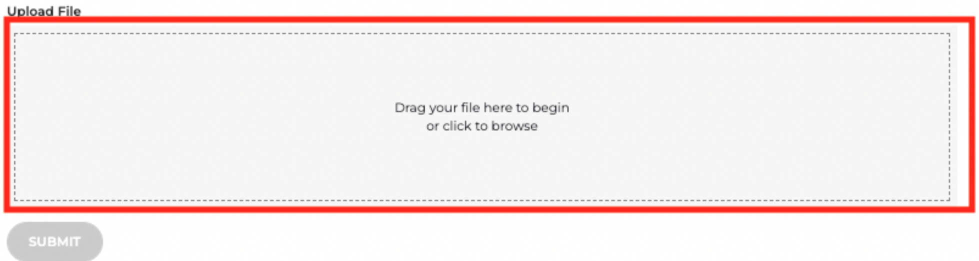
To enrol courses into your organisation follow the steps below:

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

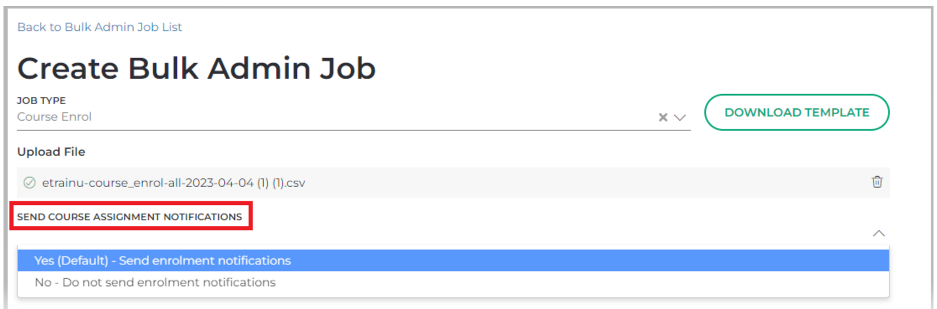
2. When you open the template enter the username of the account or the external ID for those with integration, and the “**courseid**” (To find the correct course ID, click on this link, which will direct you to the relevant resource.



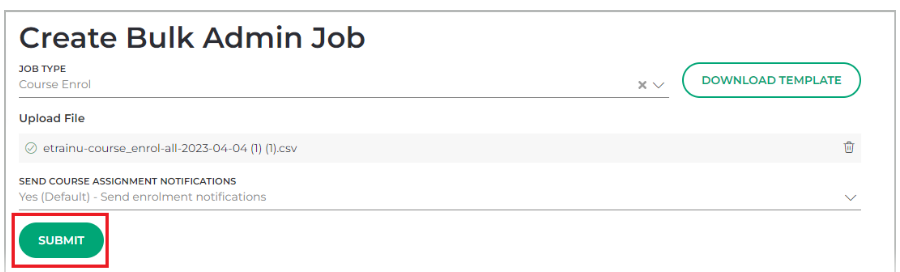
3. Save your CSV and upload or drag it into the box below.



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.

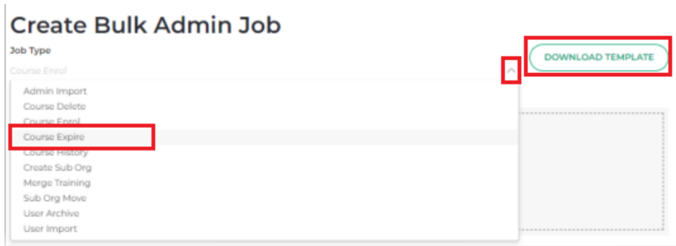
Notes:

- 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.

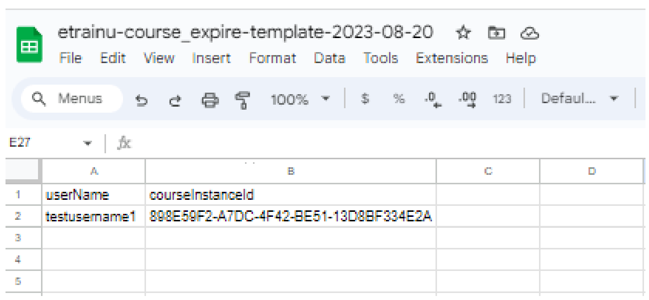
Bulk Admin Job - Course Expire

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

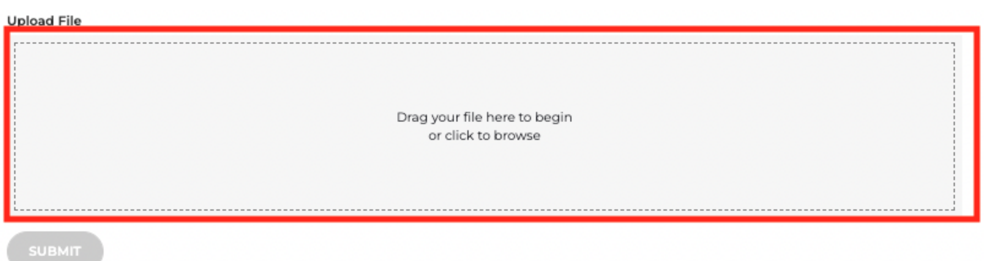
1. Click the arrow and select "Course Expire" then select "Download Template".



2. When you open the template enter the username of the account, enter the "courseInstanceId". 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. Once done, click on Submit.

5. 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.

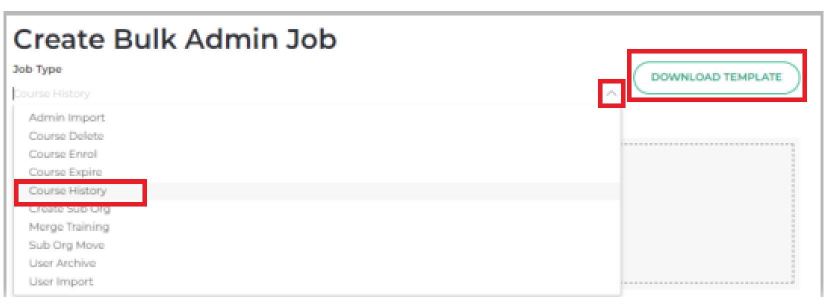
Notes:

- 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.

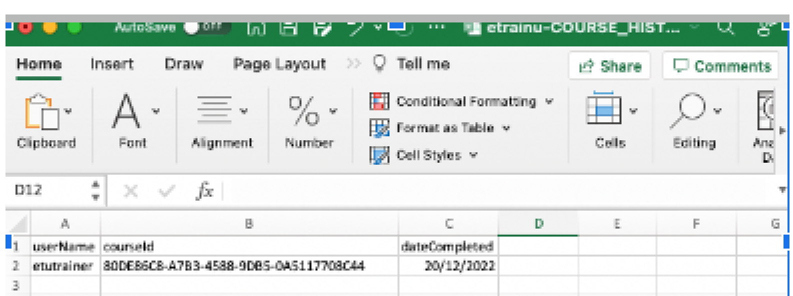
Bulk Admin Job - Course History

To import courses into your organisation follow the steps below:

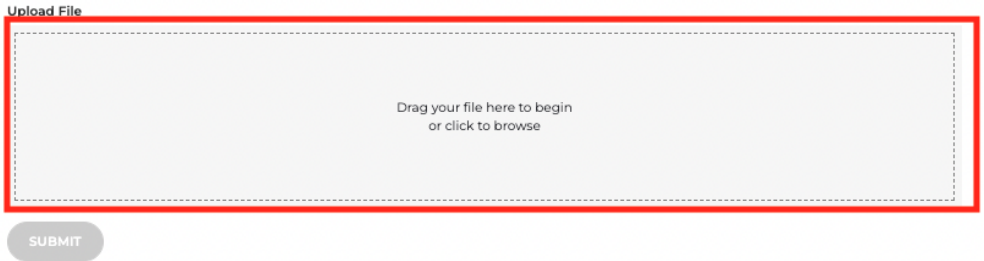
1. Click the arrow and select "Course History" then select "Download Template".



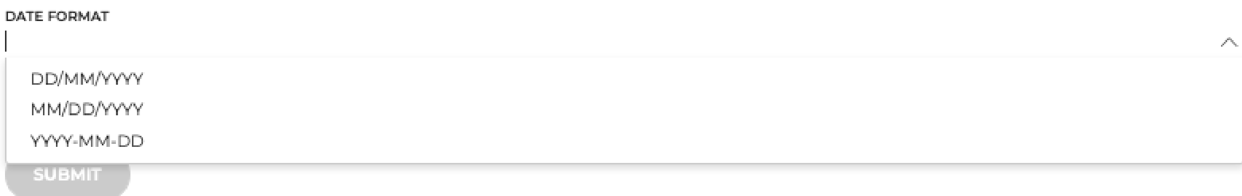
2. When you open the template enter the username of the account, enter the "courseInstanceId". This can be found when you obtain a [Training Status Report](#) (under "Extra Display Fields").



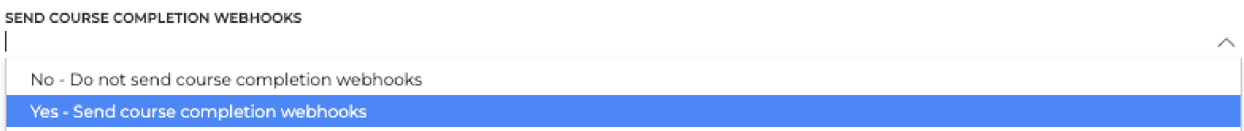
3. Save your CSV and upload or drag it into the box below.



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".

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

- 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:

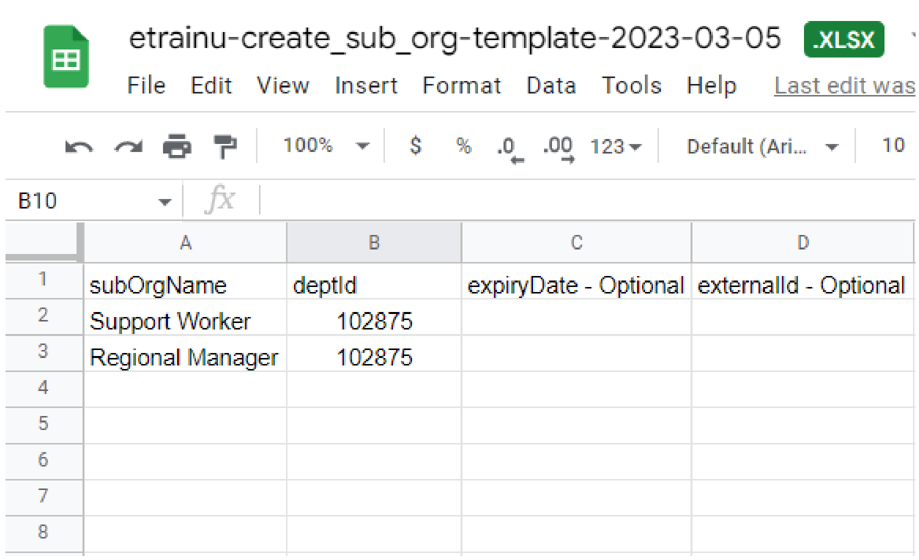
- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

Bulk Admin Job - Create Sub Org

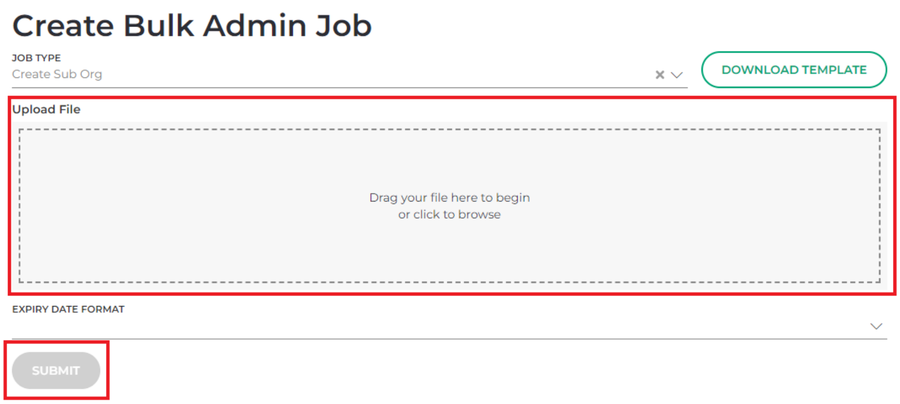
To create new Sub Orgs follow the steps below:

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.



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



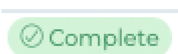
4. When it has been uploaded click “Submit”.

The job will then process.

Date Created	File Name	Type	Status	Created By	Start Time	End Time	
20/12/2022 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.

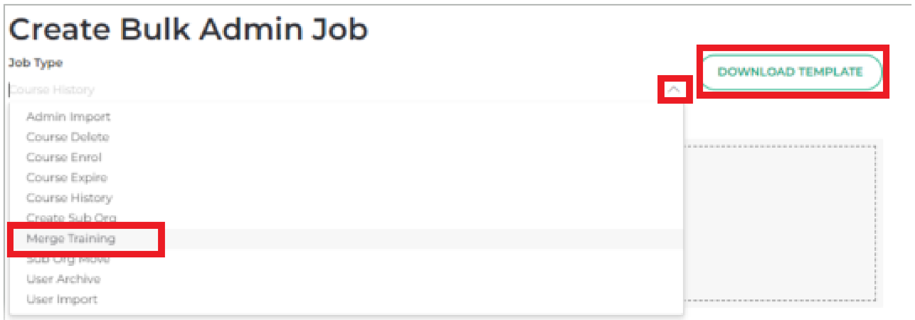
Notes:

- 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.

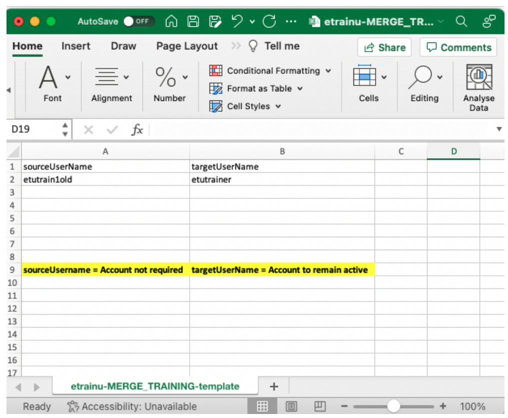
Bulk Admin Job - Merge Training

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

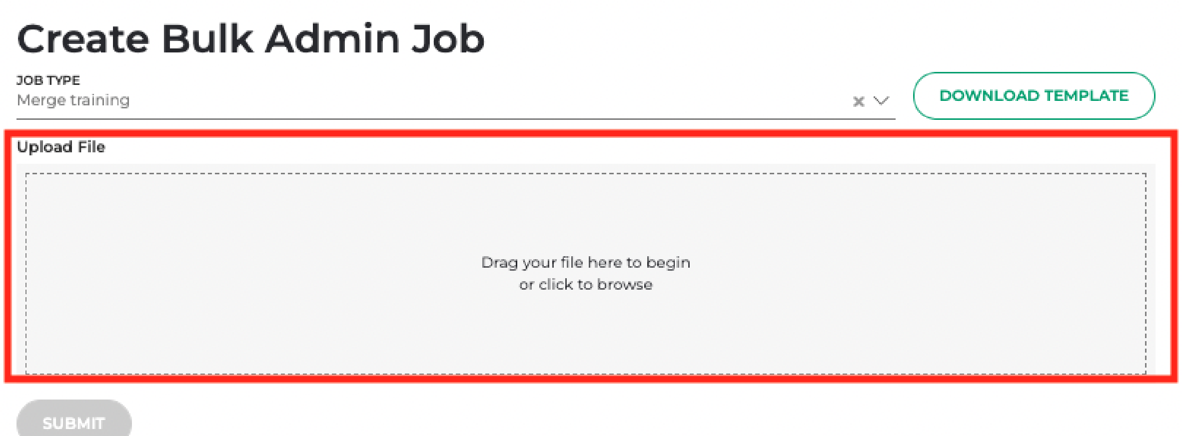
1. Click the arrow and select “Merge Training” then select “Download Template”.



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.



4. 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 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.

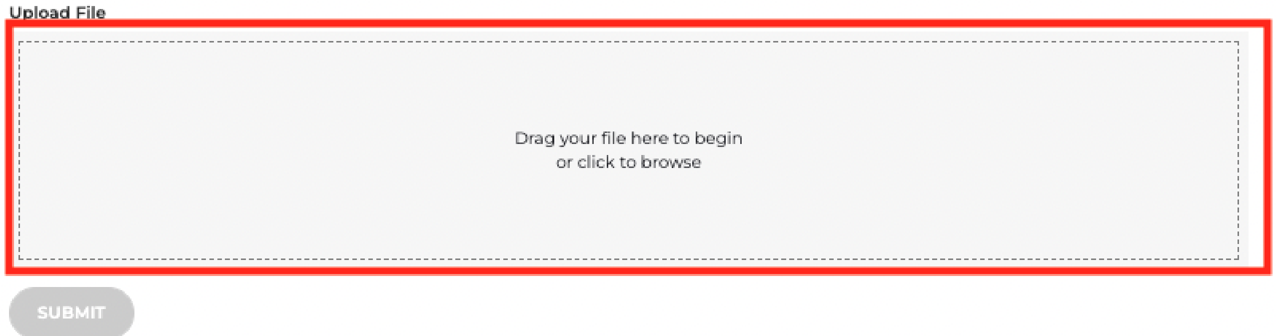
Bulk Admin Job - Sub Org Move

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

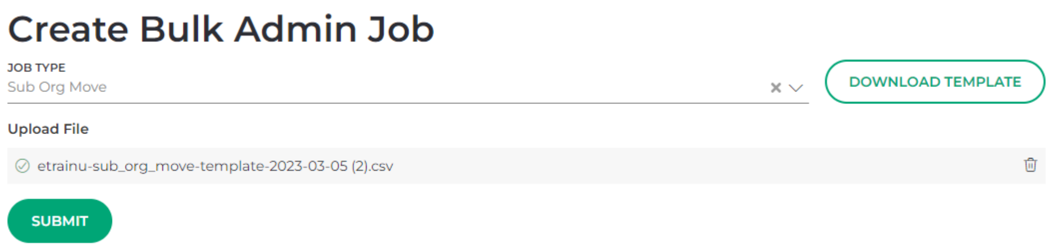
1. Click the arrow and select “Sub Org Move” then select “Download Template”.

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

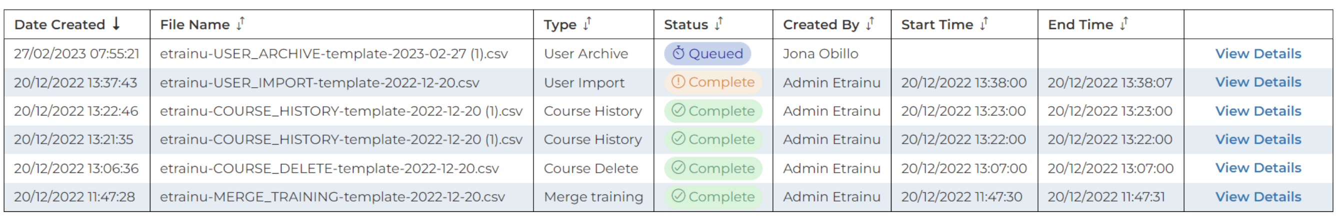
3. Save your CSV and upload or drag it into the box below.



4. When it has been uploaded click “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.

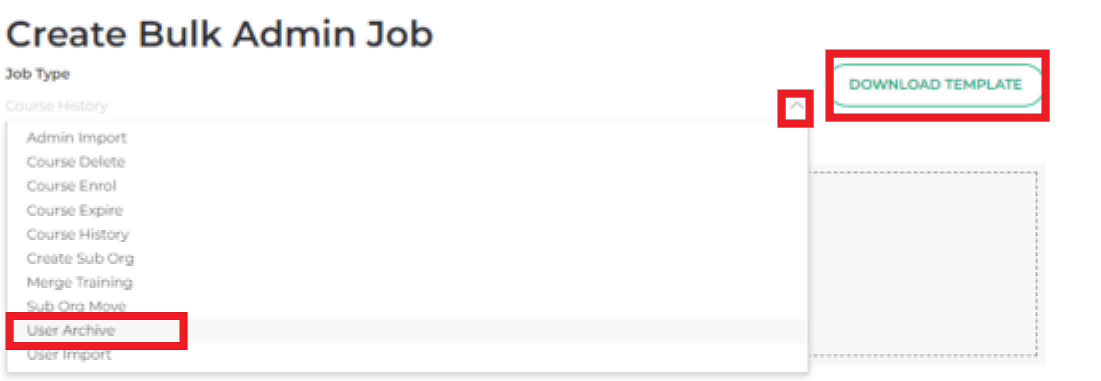
Complete - When green, the job has been completed successfully with no errors.

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.

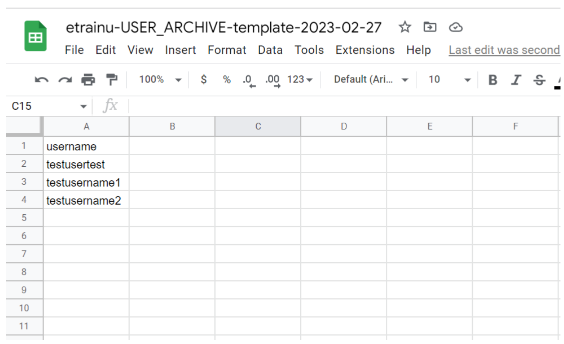
Bulk Admin Job - User Archive

To archive users in your organisation follow the steps below:

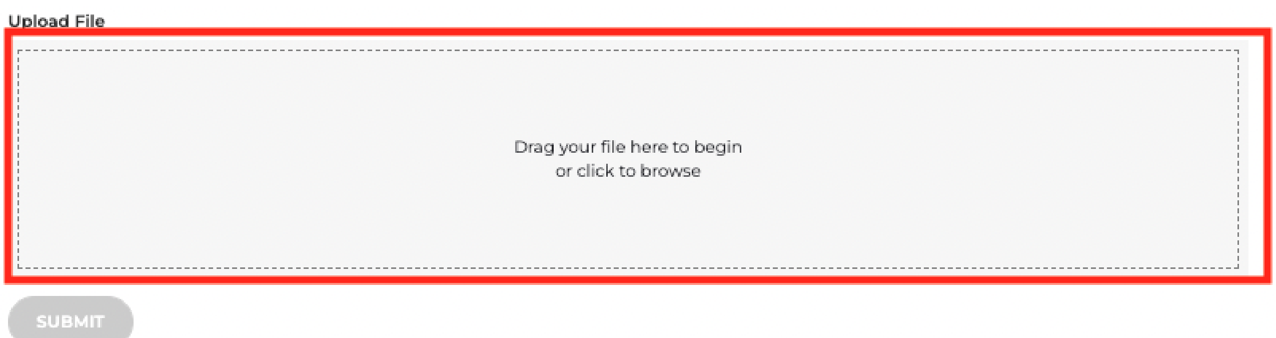
1. Click the arrow and select “User Archive” then select “Download Template”.



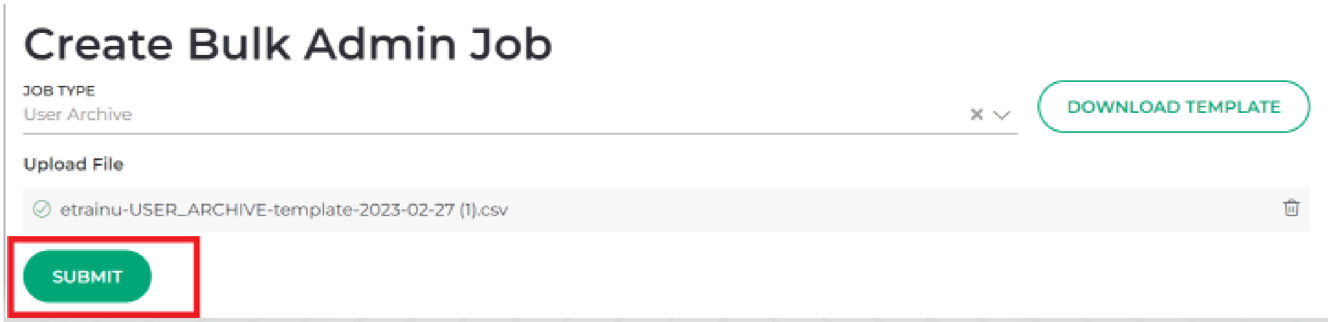
2. When you open the template enter the username/s that are required to be archived.



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



4. When it has been uploaded click “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:

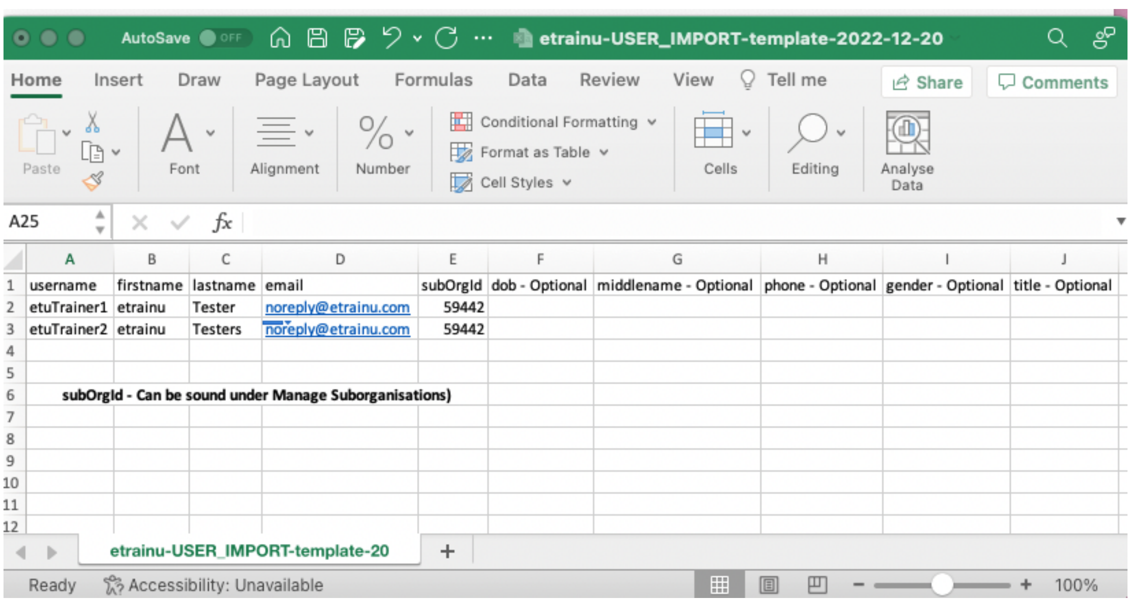
- The job may have the status “Queueing” the job runs in the background and processes 10 rows of your CSV per 30 seconds.
- Each template can only have a maximum of 1000 rows.

Bulk Admin Job - User Import

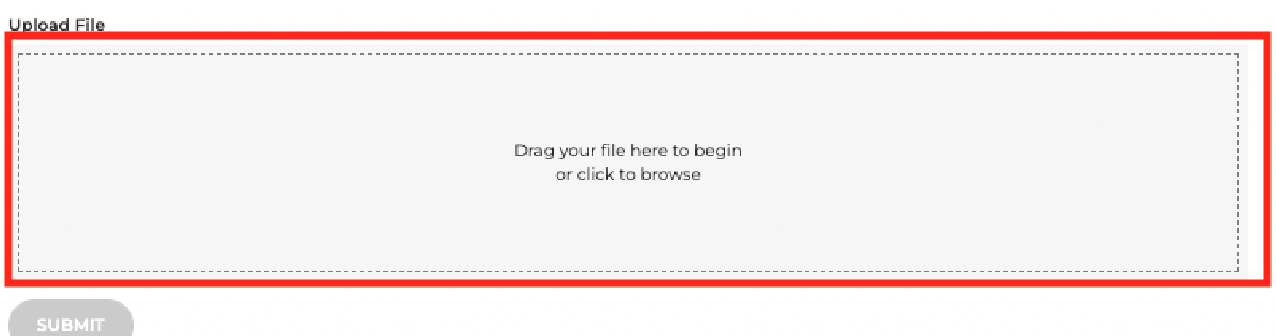
To add new users to your organisation follow the steps below:

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.

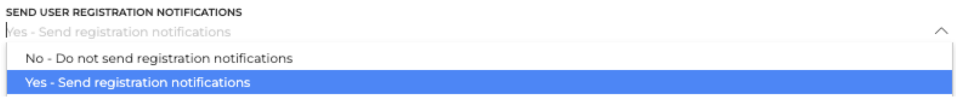


3. Save your CSV and upload or drag it into the box below.



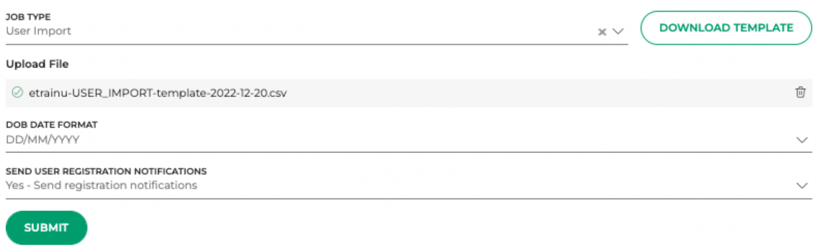
4. Select the DOB Format (as entered on your CSV). ****Not required if this field is blank****

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



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".



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

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

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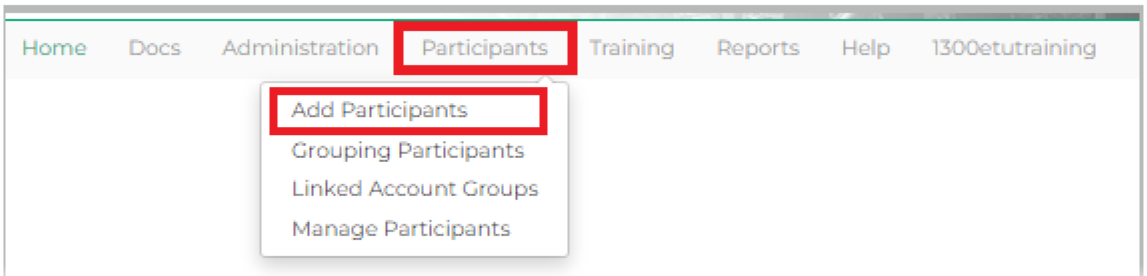
Notes:

- 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”.



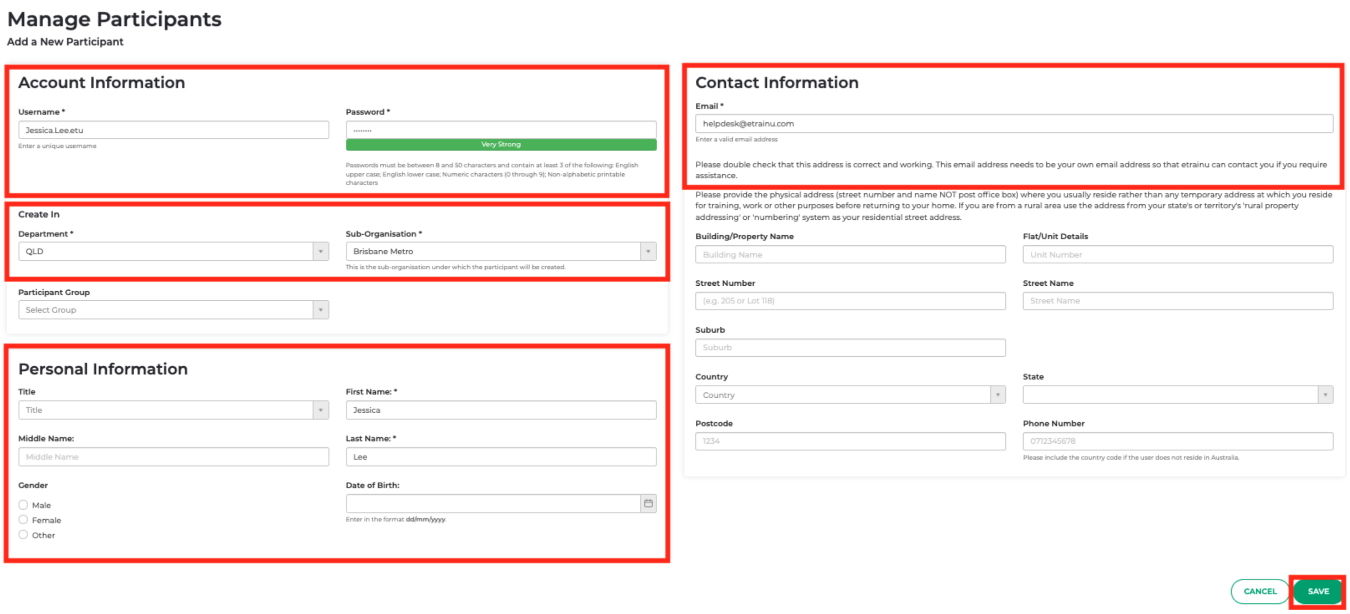
4. Fill in the Manage Participants screen to create a participant account.
Please note you will need to enter at minimum all mandatory information marked with an asterix *.

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.

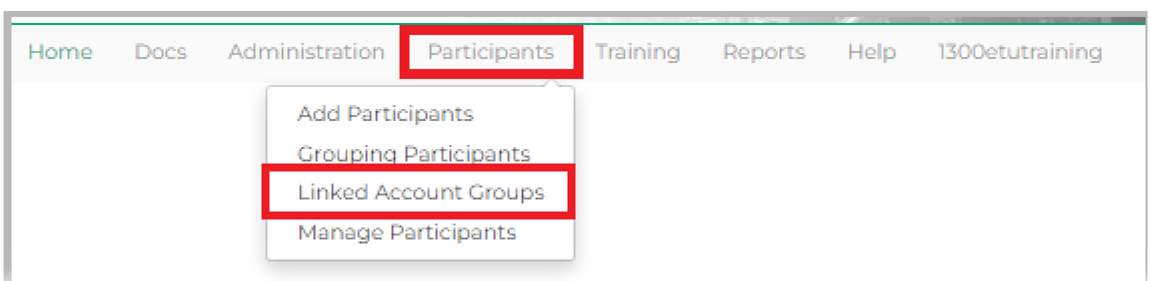


Creating a Linked Account

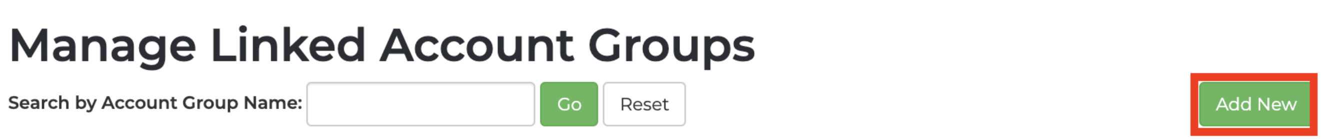
A linked account group allows someone with multiple accounts types to switch between these without having to log out and log in each time they need to move between them. Typical switch links will include Participant, Administrator, Supplier (Training Admin) or Assessor.

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

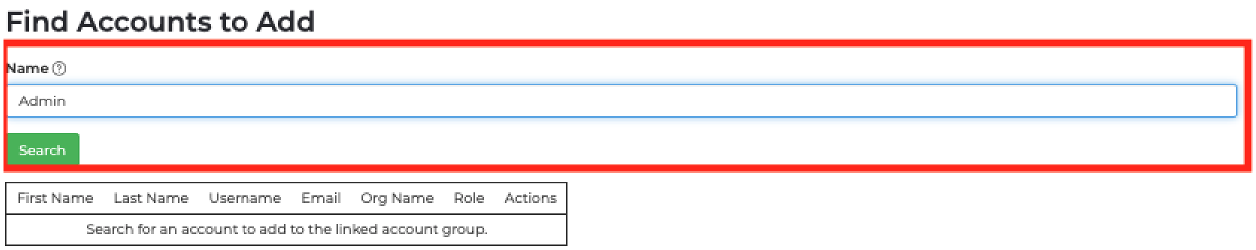
6. Click on “Participants”, then select “Linked Account Groups”.



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**".



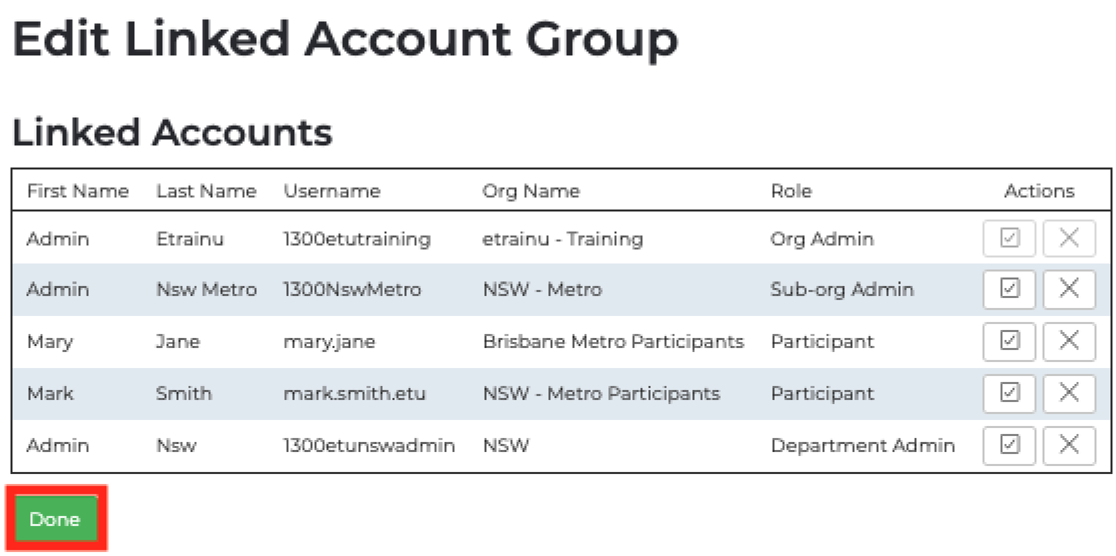
8. Enter either the First Name or Last name of the user or their username and click “Search”.



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”.



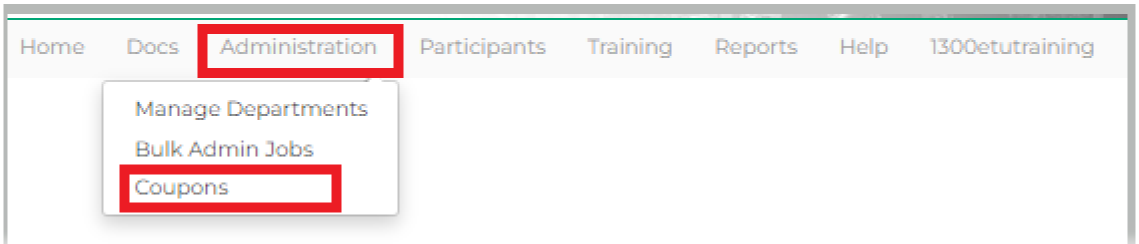
First Name	Last Name	Username	Org Name	Role	Actions
Admin	Etrainu	1300etutraining	etrainu - Training	Org Admin	
Admin	Nsw Metro	1300NswMetro	NSW - Metro	Sub-org Admin	
Mary	Jane	mary.jane	Brisbane Metro Participants	Participant	
Mark	Smith	mark.smith.etu	NSW - Metro Participants	Participant	
Admin	Nsw	1300etunswadmin	NSW	Department Admin	

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

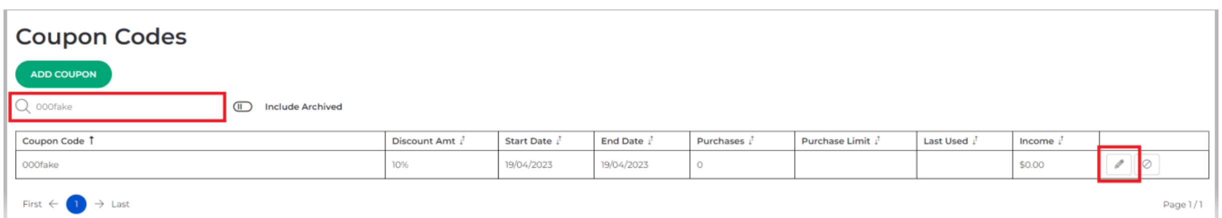
Creating a coupon code

To create a coupon code follow the steps below.

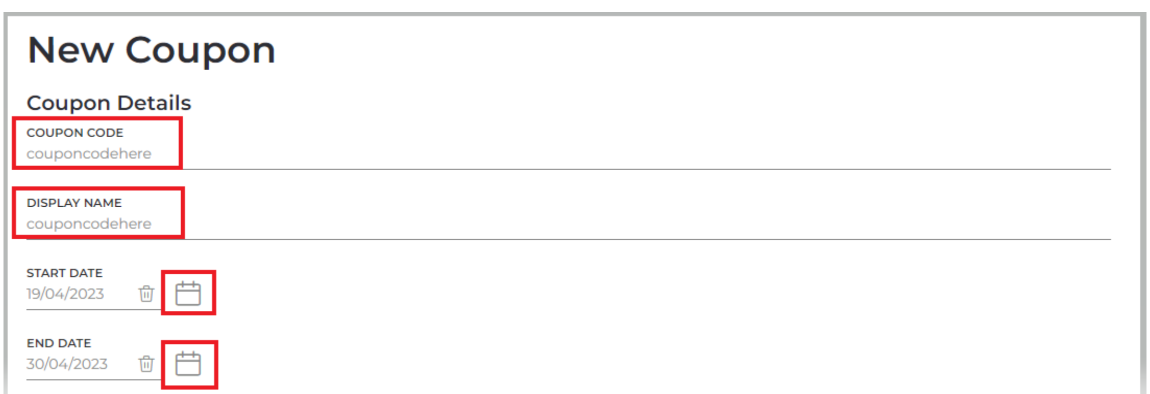
Step 1: From your org admin account, go to Administration then Coupons.



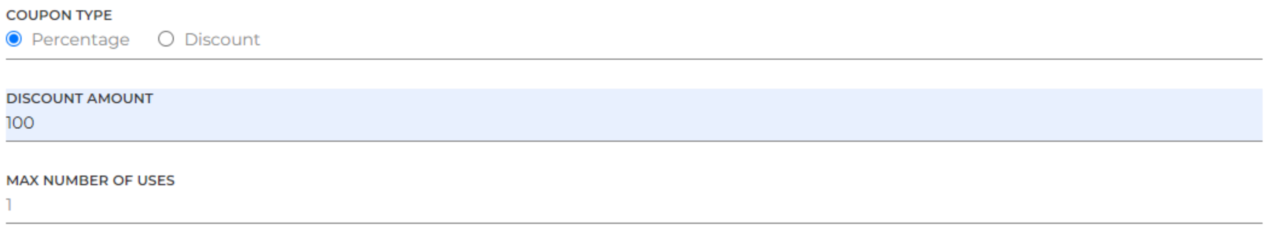
Step 2: Click on Add Coupon to create new code or use the search field to search for any existing code.



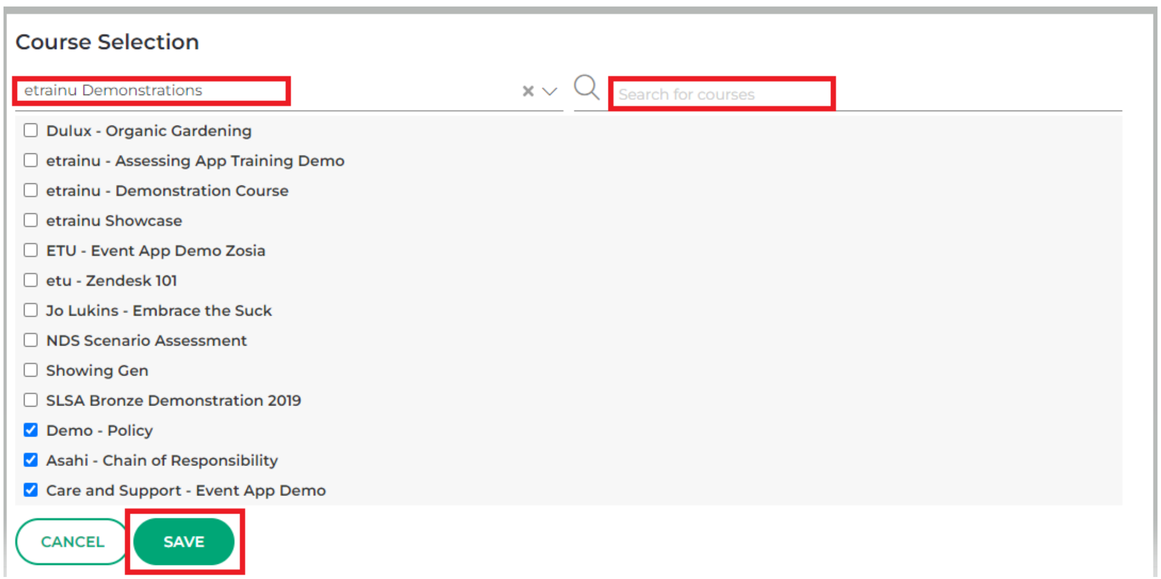
Step 3: Enter the coupon code in the Coupon Code and Display Name Fields then add the dates.



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



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.

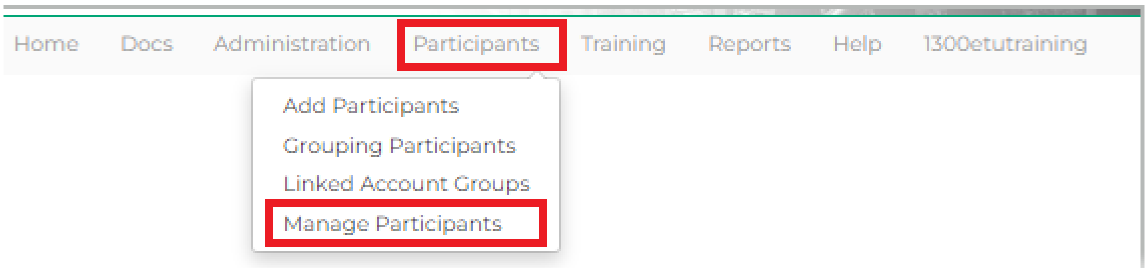


Note: you can add multiple courses per code. To do this just tick the boxes and/or clear the search field.

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".

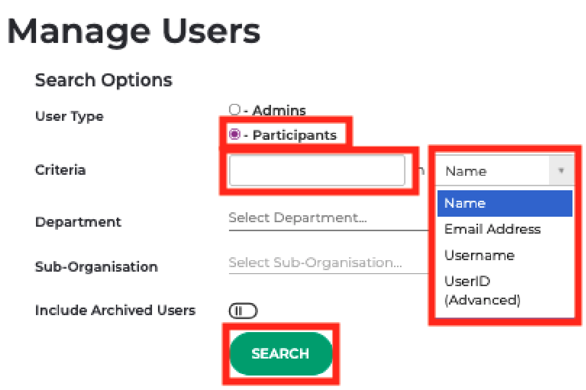


On this page, you can search for Admin or Participants. To search for a particular Participant record, follow the below instructions.

1. Click "Participants" from the User Type.

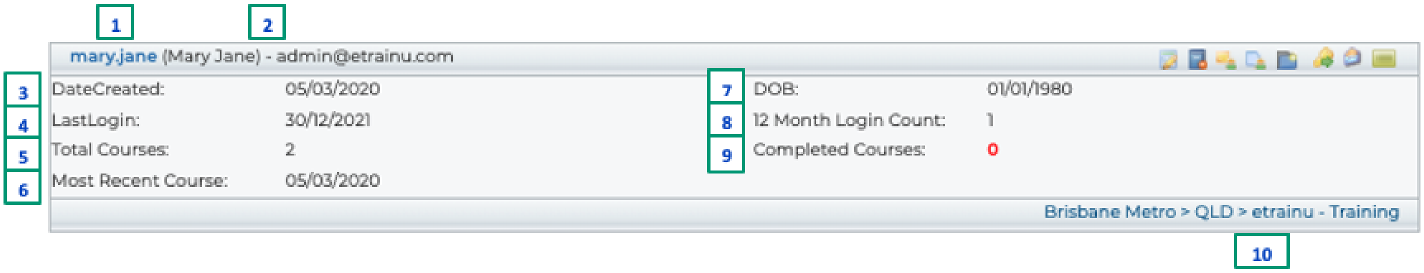
2. Within the search criteria, type the name/email/username of the Participant you wish to locate and select the type of criteria by selecting from the drop-down box.

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



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**

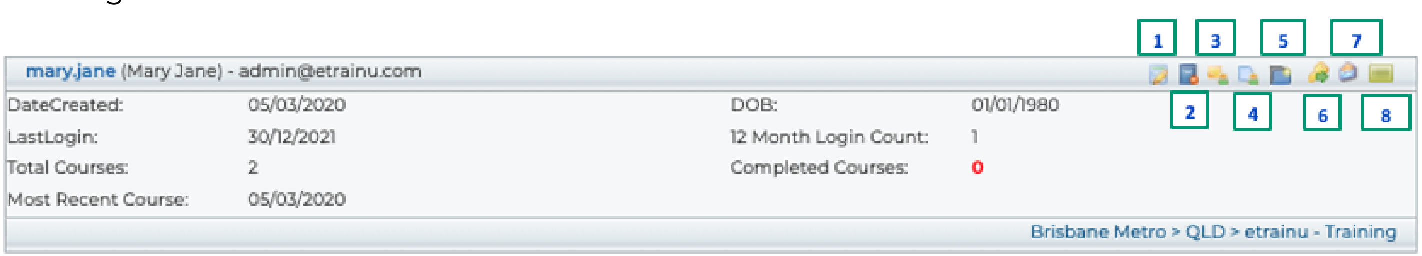
7. **The Participant's date of birth**

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.

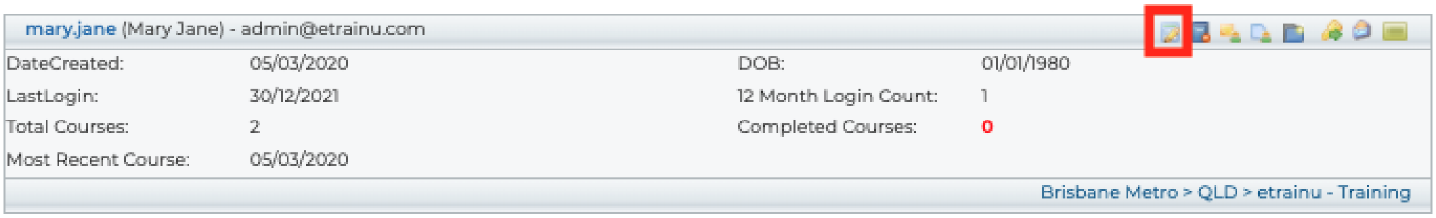
7. **Email:** This icon allows you to send a personalized email from the LMS directly to the Participant.

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.

Edit Participant Account

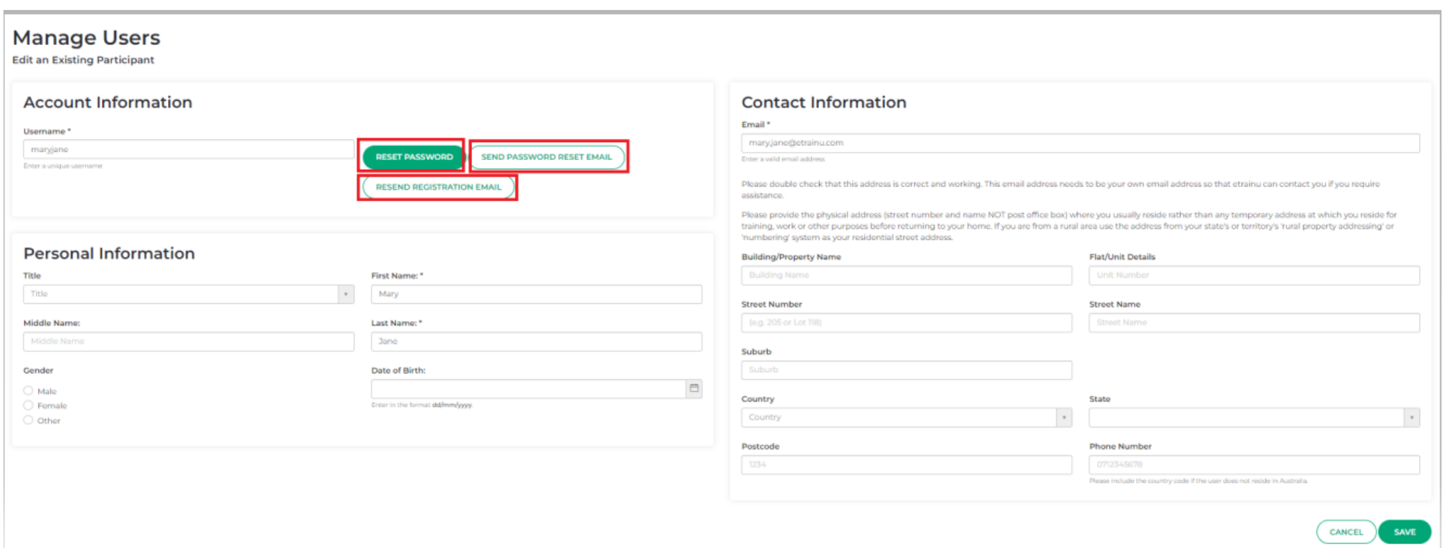
To edit a participant's account, follow the below instructions.

1. Click the "edit" icon from the menu bar.



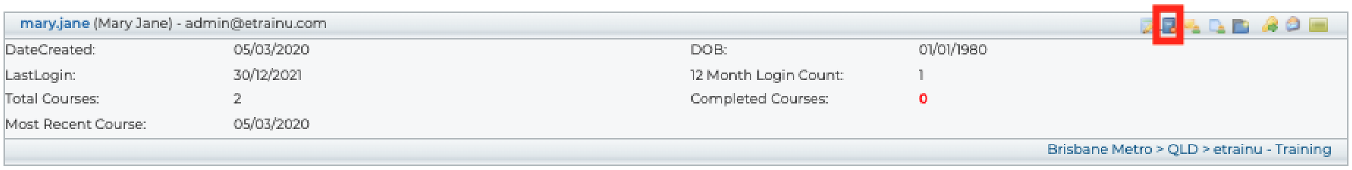
2. Make the edits required for the participant account and click "save".

3. To resend registration email, click the 'resend Registration Email button, and the registration email will be sent to the email address registered in the account. To reset a password, click the "**Reset Password**" button, enter in the new password and click "**save**". Alternatively, click "**Send Password Reset Email**" and the user will receive an email with instructions on how to reset their password.



Archive Participant Account

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



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.

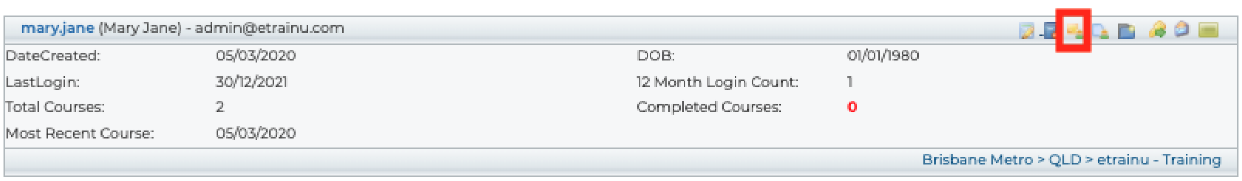
To unarchive the user, once you have searched for them click the "Unarchive" button.

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.



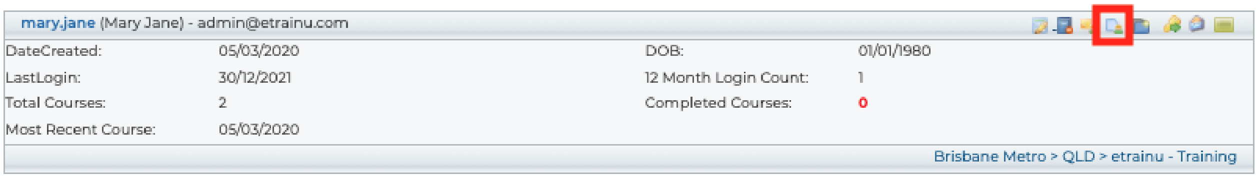
3. Type your notes in the field and click "Save".

Upload a Document to a Participant Account

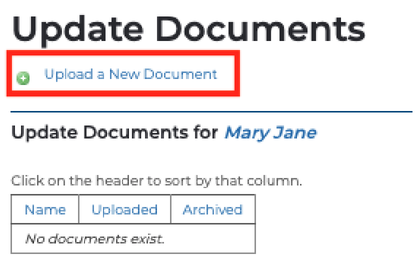
Adding documents to a participant's account can be a great place to store this information to save an administrator working across multiple systems. Documents, once added, cannot be removed. These documents are not visible to a participant.

1. Locate the participant using the "Manage Participants" steps.

2. Click on the "User Documents" icon.

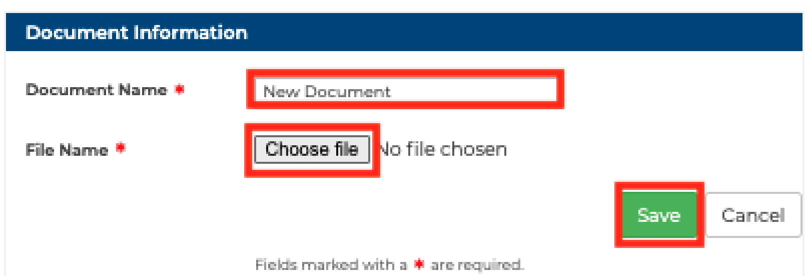


3. Click "Update a New Document".



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

5. Click "Save".



Upload a User Record to a Participant Account

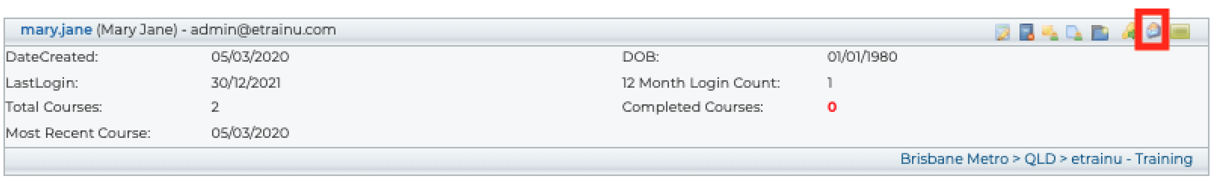
User Records, similar to Documents, are great to store information within the LMS. This functionality will be removed from the etrainu LMS.

Sending an Email to a Participant

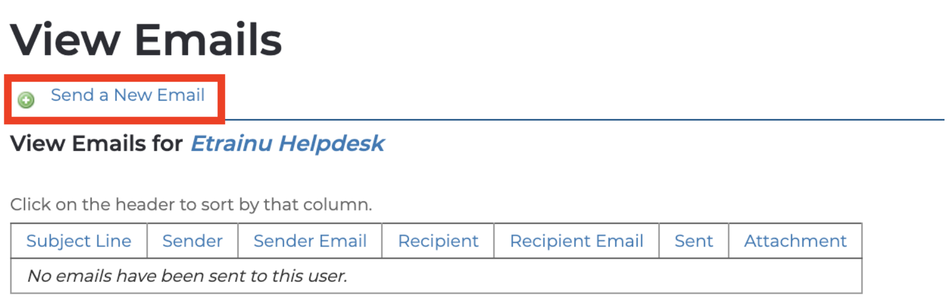
The etrainu LMS allows you to send an email directly to a Participant at any time. This function will also record a snapshot of emails sent.

1. Locate the Participant using the “Manage Participants” steps.

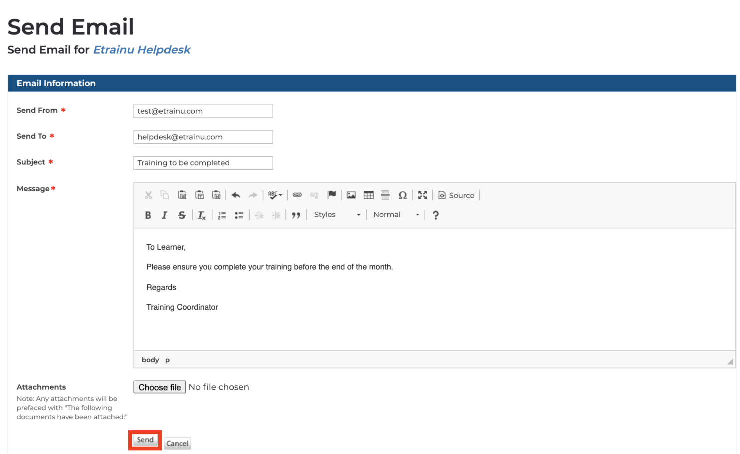
2. Click on the “Send Email” icon.



3. Click on “Send a New Email”.



4. Fill in the email information, upload any attachments if required using the “Choose File” button, and click “Save”.

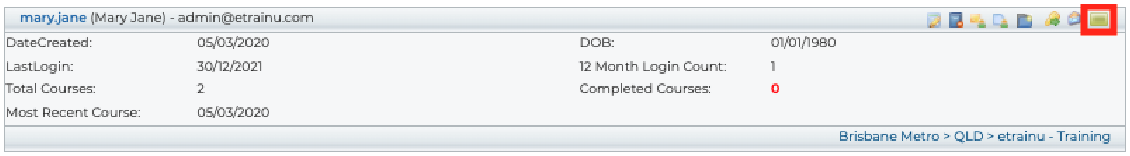


Check Participant Training Progress

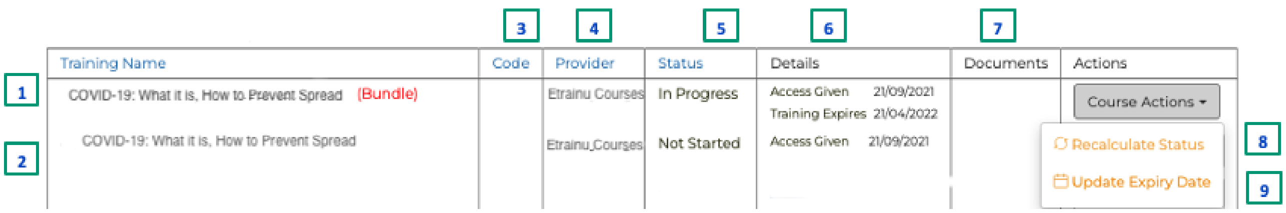
This is the most commonly used function within the LMS and Manage Participants section. This function allows you to view the progress status of a Participant.

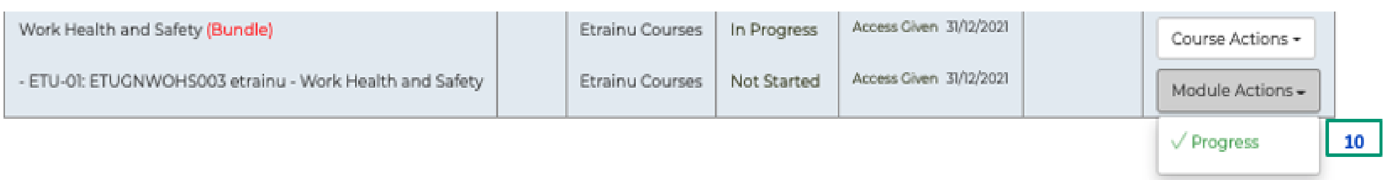
1. Locate the Participant using the "Manage Participants" function.

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.





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.

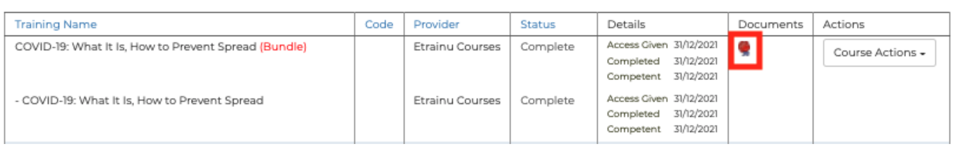
10. **Progress:** Is used to mark the module (induction) complete.

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.

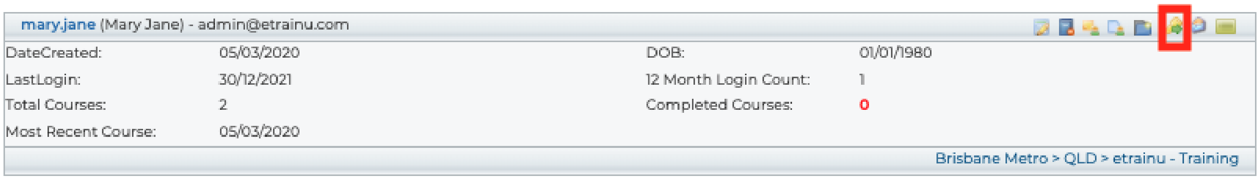
5. **No Permission to View Certificate:** This highlights you do not have access to view the certificate.

Assign Training - Individual

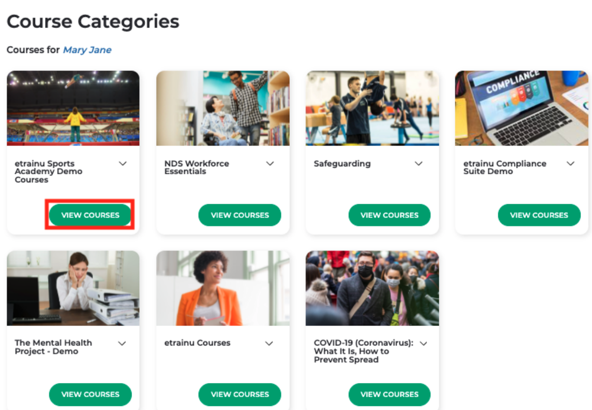
There are two methods in which you can assign training: assigning training per individual and by assigning training to a bulk group of Participants. To assign training to an individual, follow the below steps:

1. Locate the Participant using the "Manage Participants" steps.

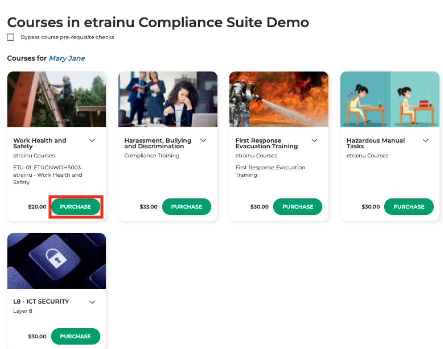
2. Click on the "Send Keys" icon.



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.

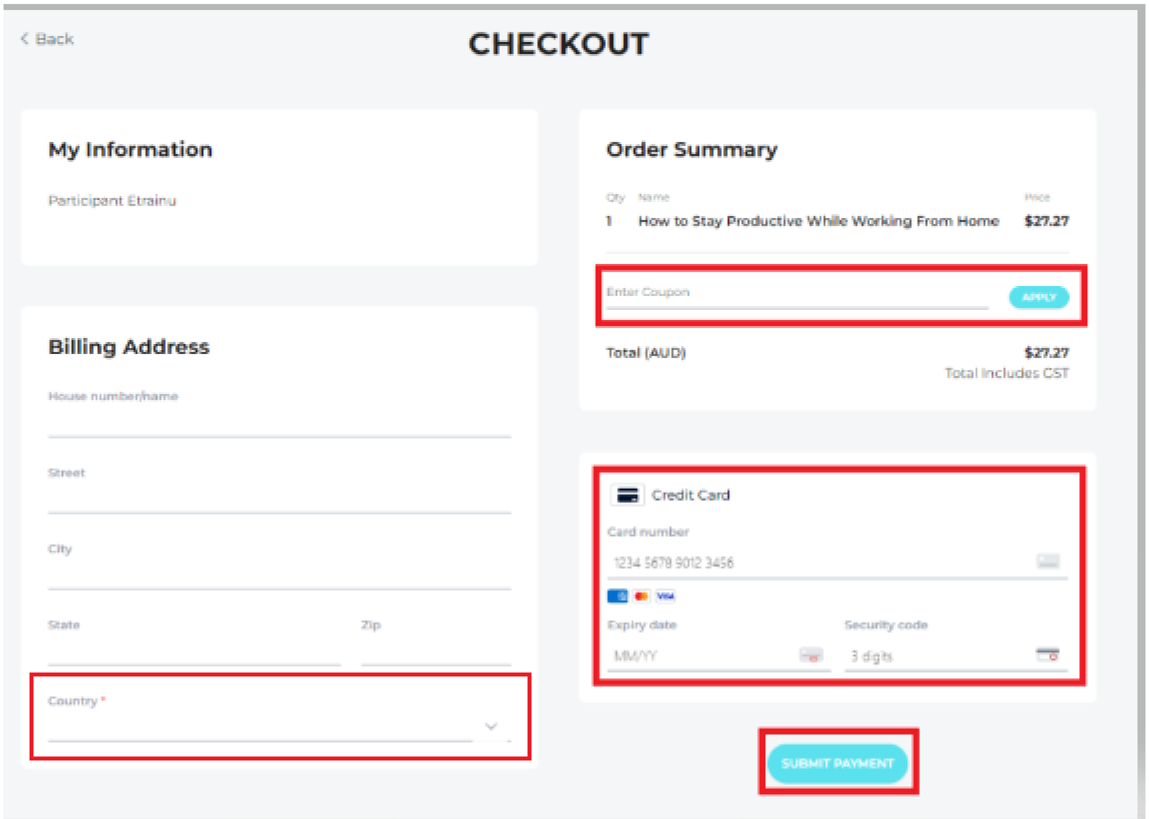


4. Locate the course you wish to allocate and click "Enrol" or "Purchase".



***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".



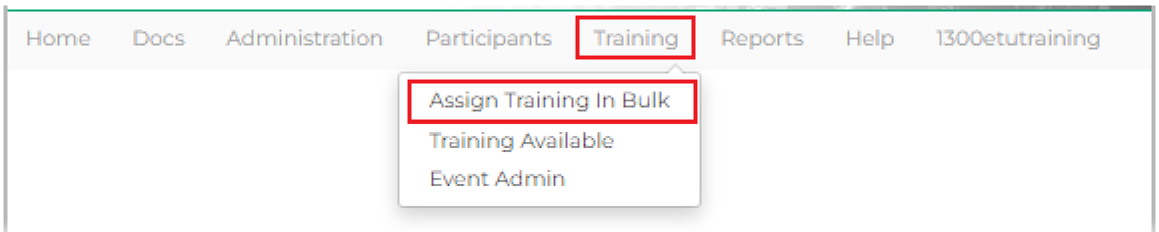
6. Once processed, it will take you back to the Manage Participants screen and will be available immediately in the user's account.

Assign Training - In Bulk

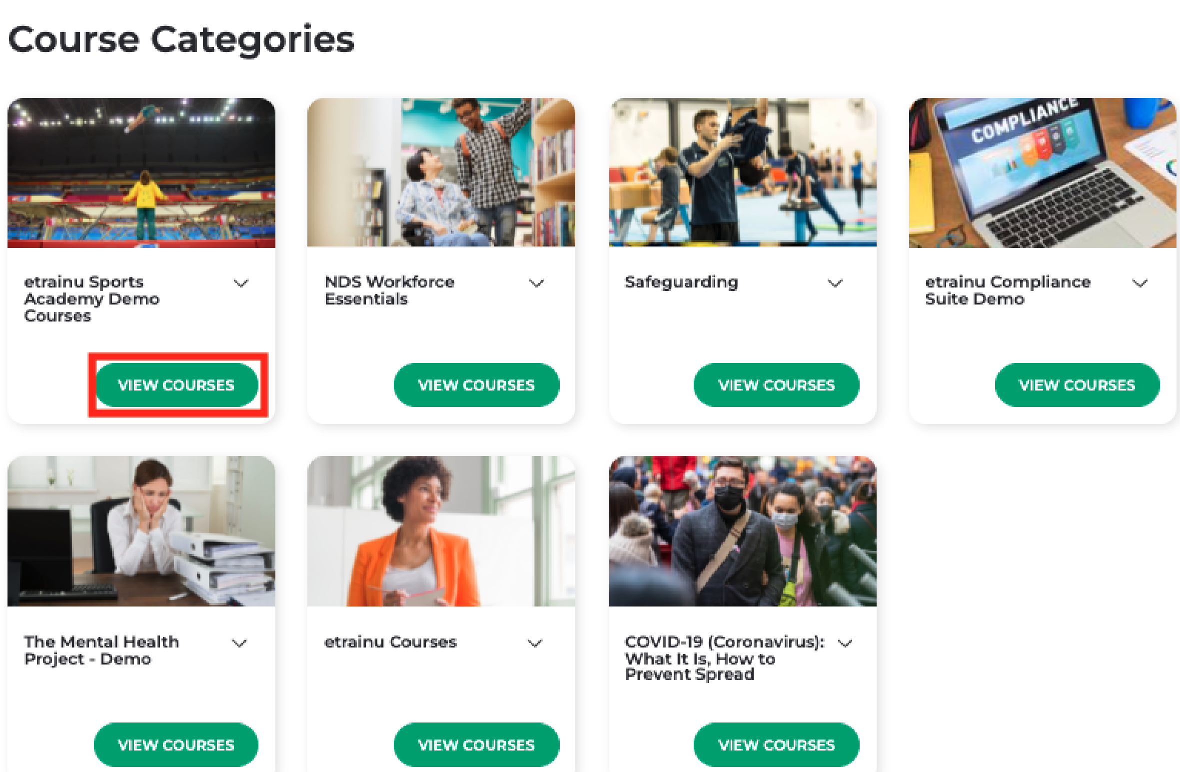
If you have a large number of Participants to assign training to, you may prefer to use the "Assign Training in Bulk" function. This function allows you to assign a training course to a group of Participants.

***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.*

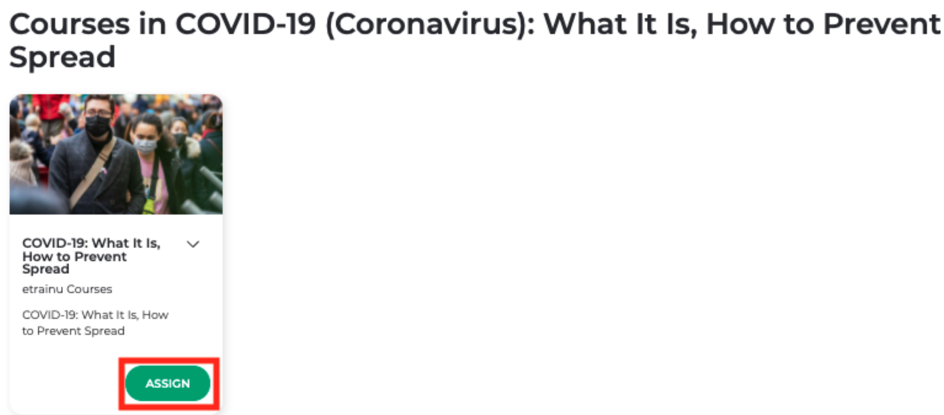
1. Click "Training" from the menu bar at the top of the screen, followed by "Assign Training in Bulk".



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.



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



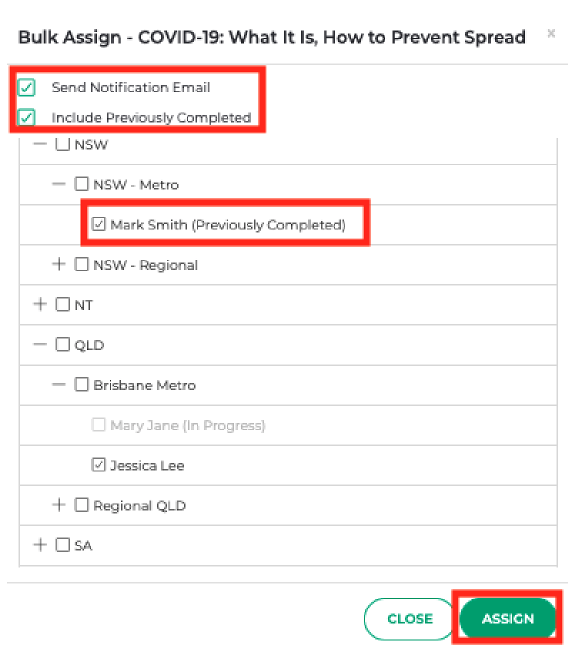
4. You will then be directed to a list of Participants within your administration access view. From this list, select all Participants you wish to assign the course to. You will be able to see the participants who are in progress for the course or have completed the course.

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

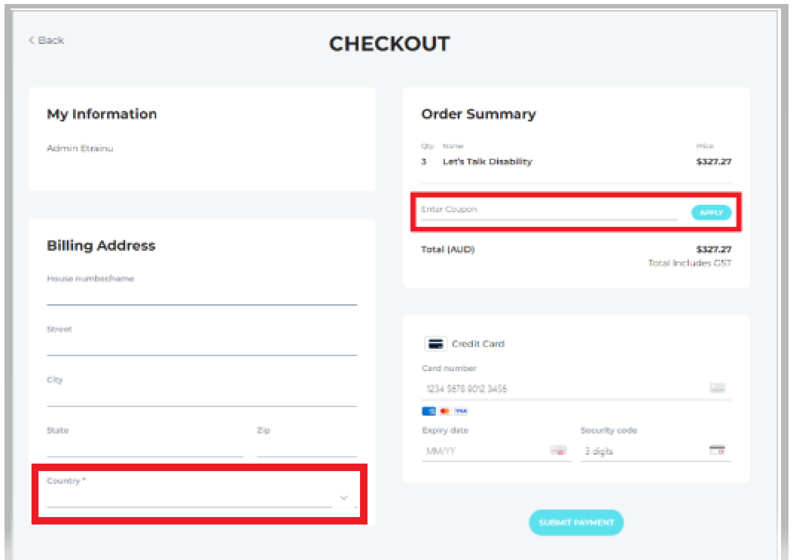
5. If you wish to send all Participants an email notification, click “Send Notification Email”; if you do not click this, an email notification will not be sent.

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

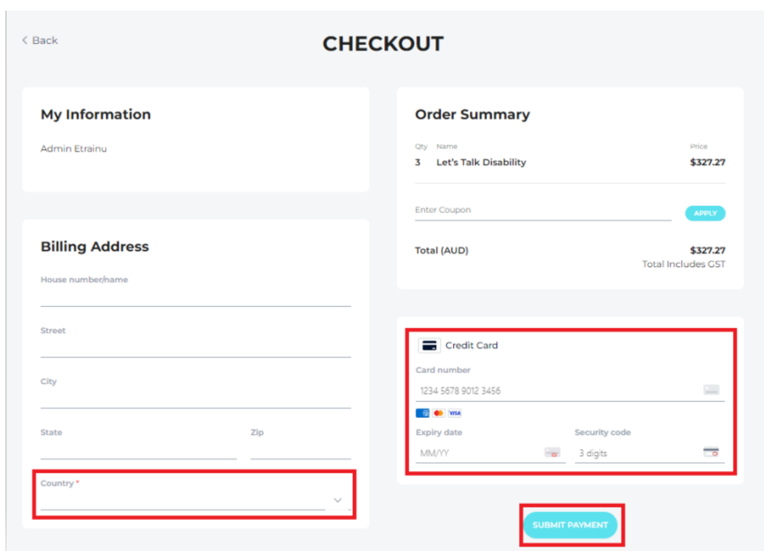
6. Click “Assign”.



7. 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.



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



9. 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.*

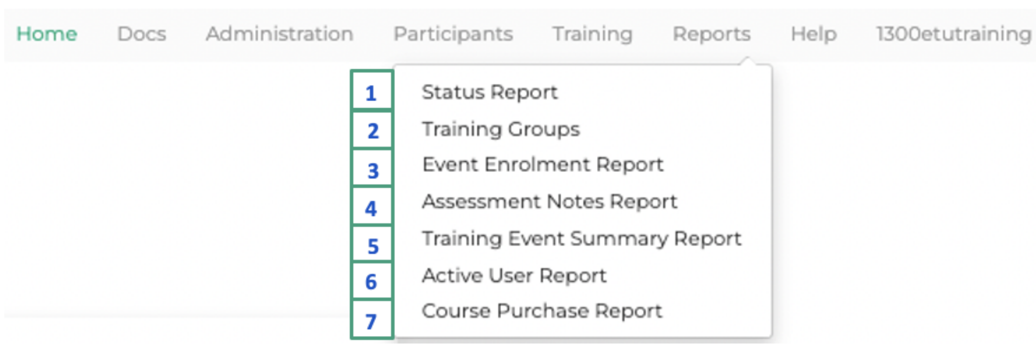
Viewing Reports

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.

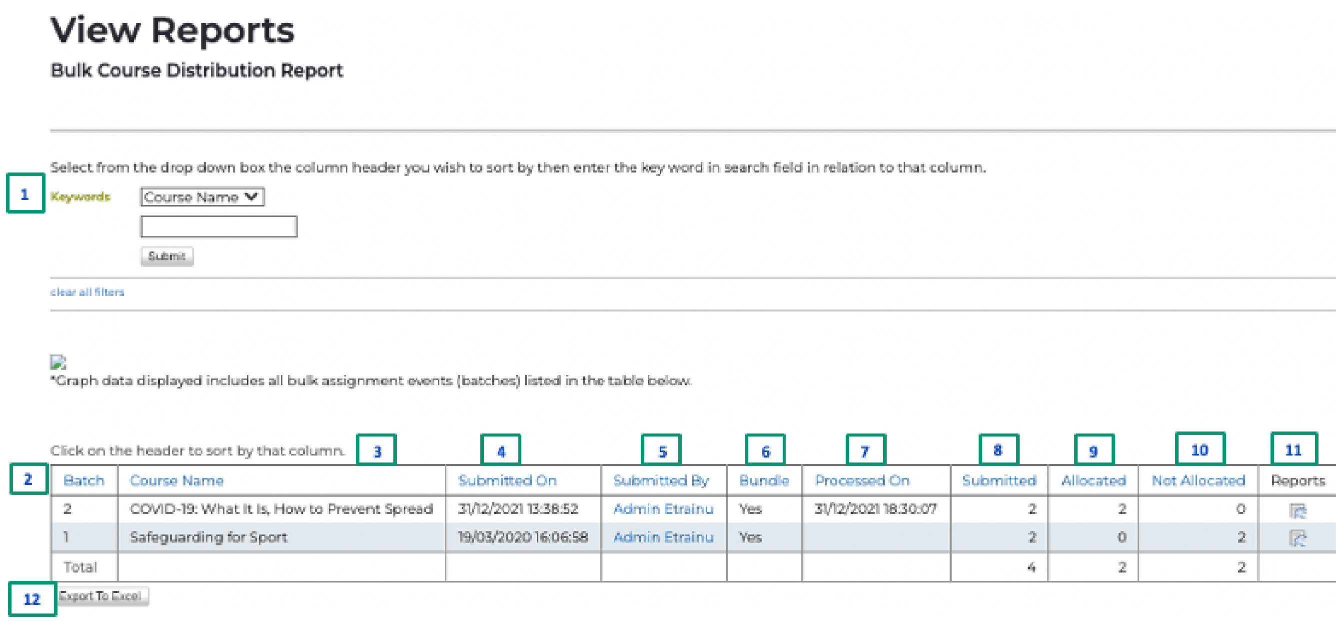
5. **Training Event Summary Report:** This report outlines the status of each event, assessor participants.

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.



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.

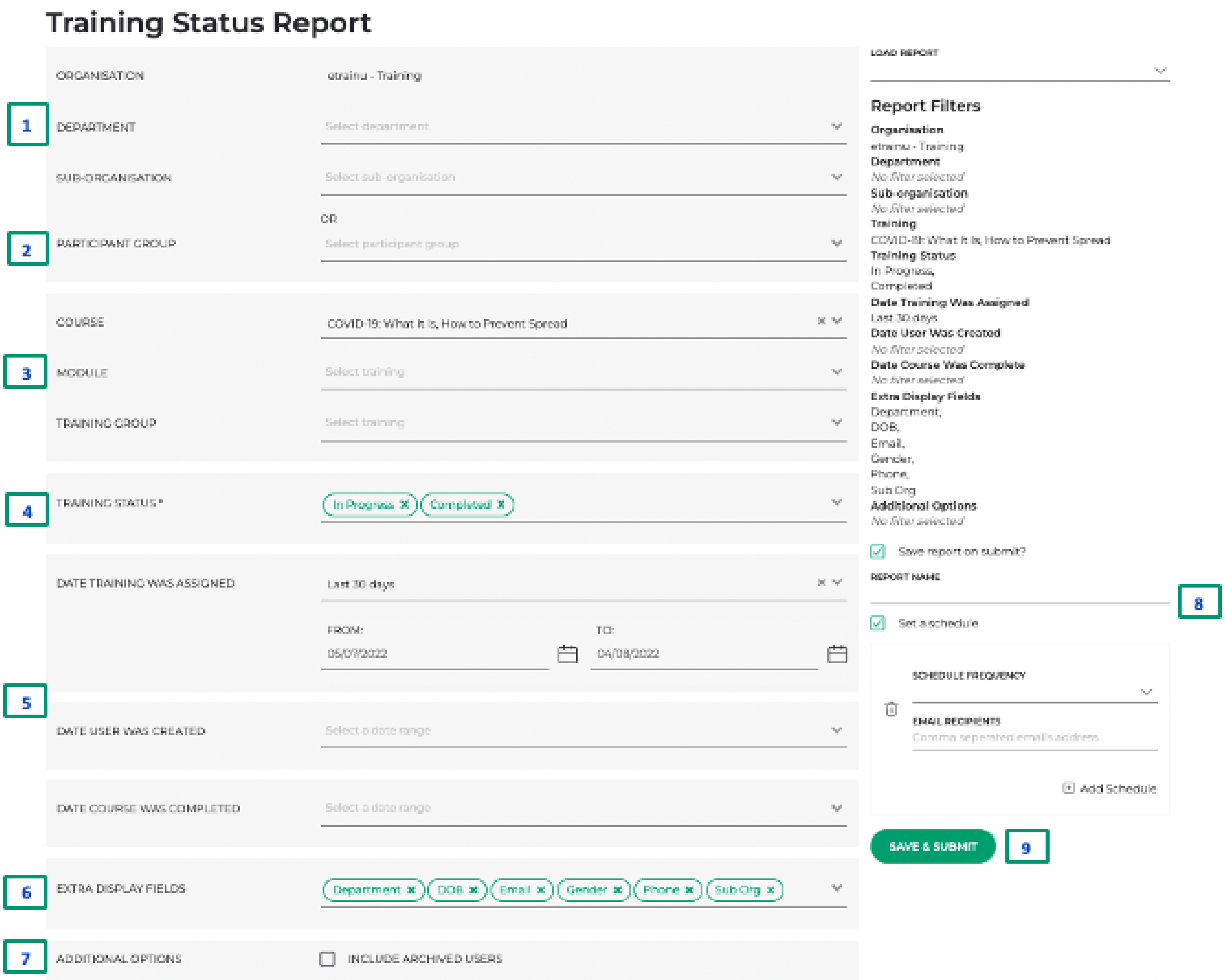
10. **Not Allocated:** Number of accounts the request was not allocated to.

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:



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) it 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.

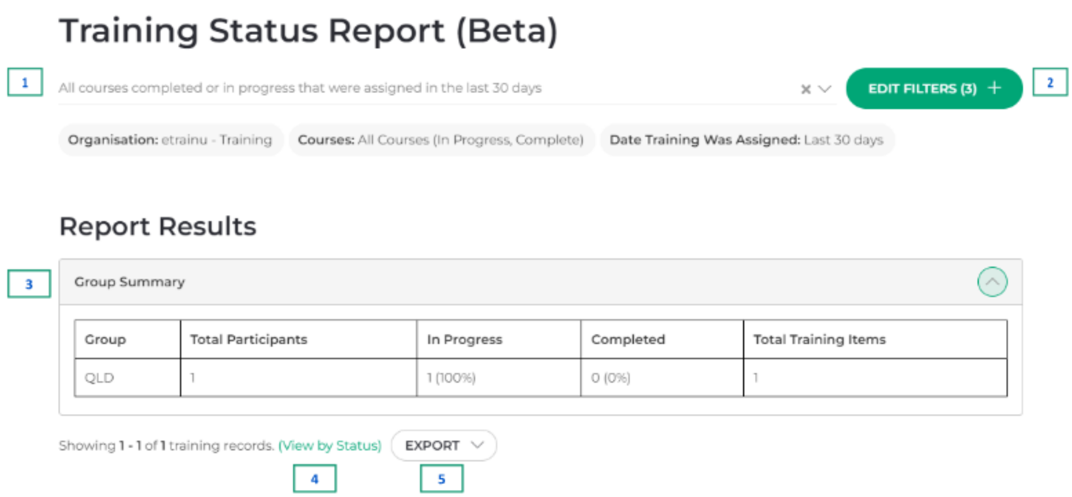
7. **Additional Options:** You can choose to include users that have been archived.

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.



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.

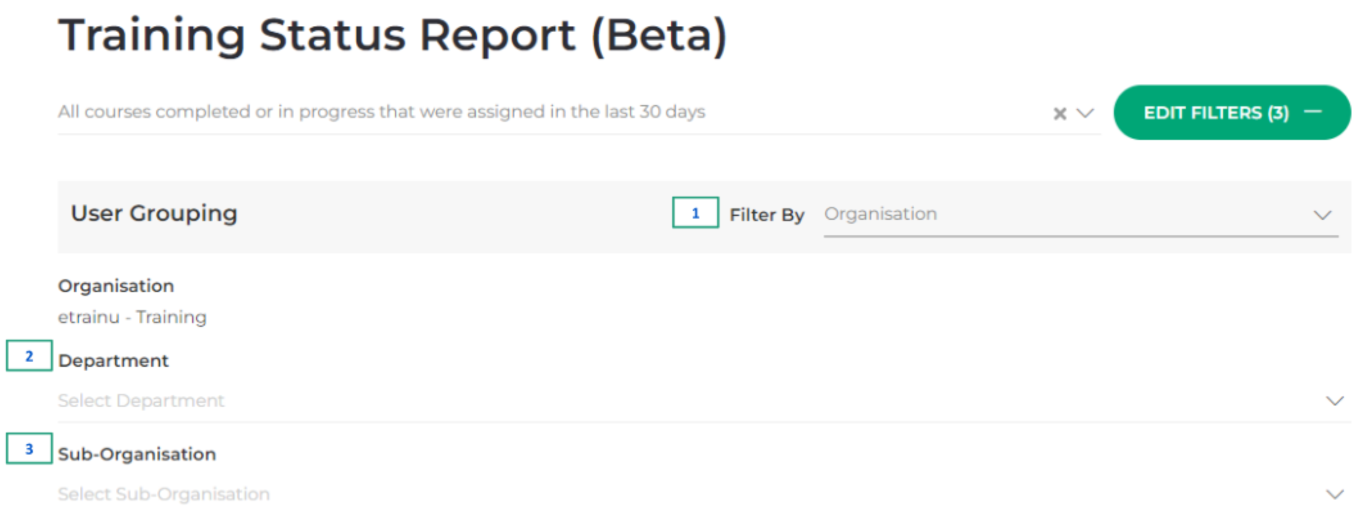
2. **Edit Filters -** To customise the report, use the edit filter function.

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.

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



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.

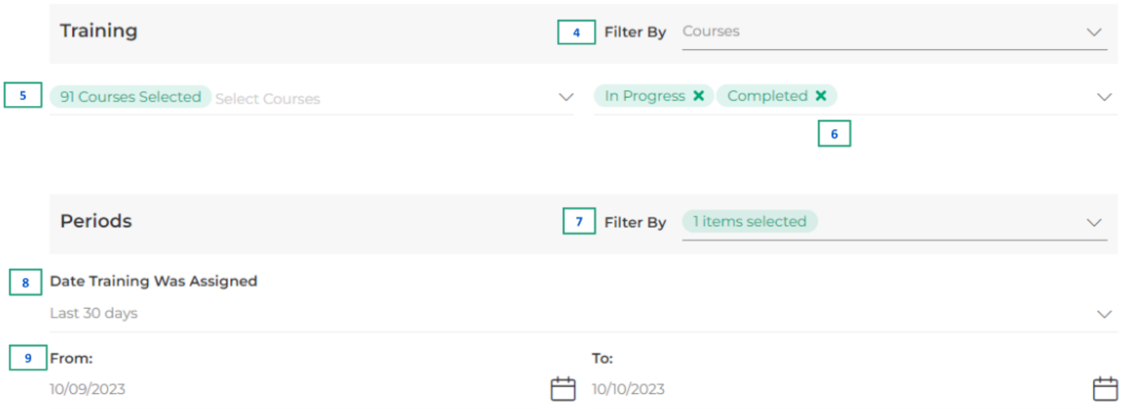
1. **Filter By** - This option permits you to filter the report by either Organisation or Participant Group.

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.



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.

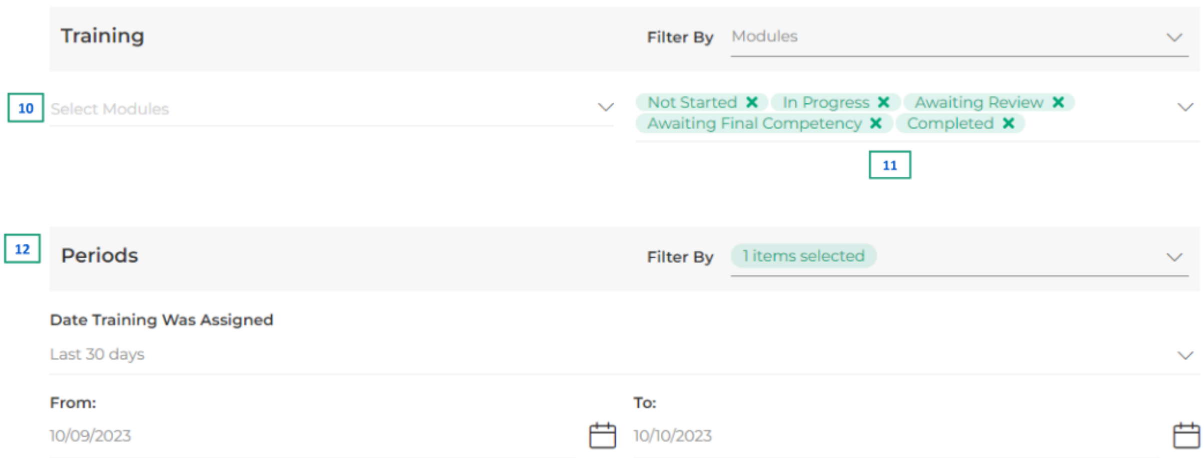
7. **Periods - Filter By** - By default, this will be set to the date training was assigned. However, you have the option to choose from various time periods, including the user-created date and course completed date. This can now query data over longer time frames, such as the last 3 and 5 years.

   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.

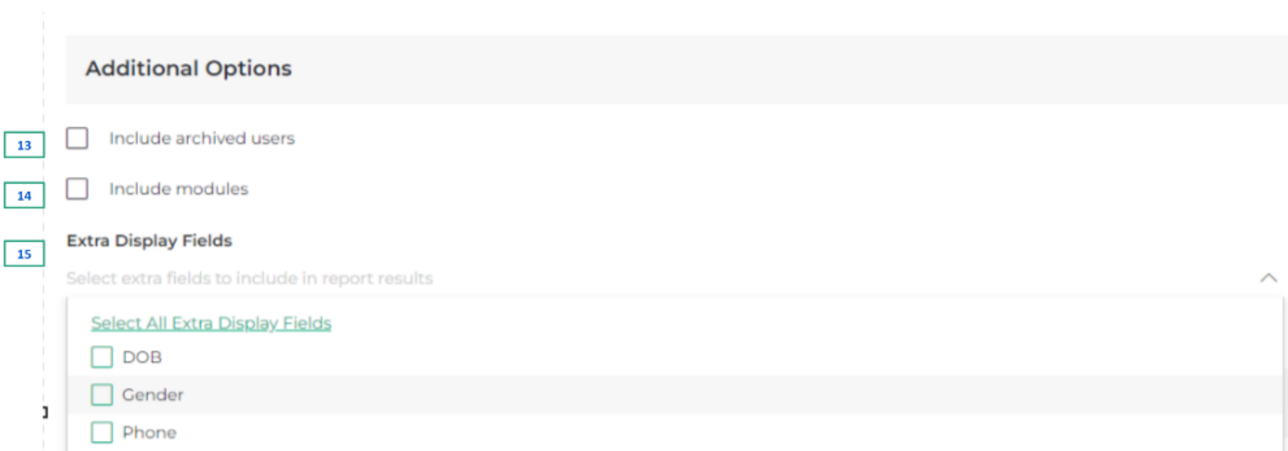


10. **Select Modules** - This allows you to select either all modules or specific modules that you want to include in the report.

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.

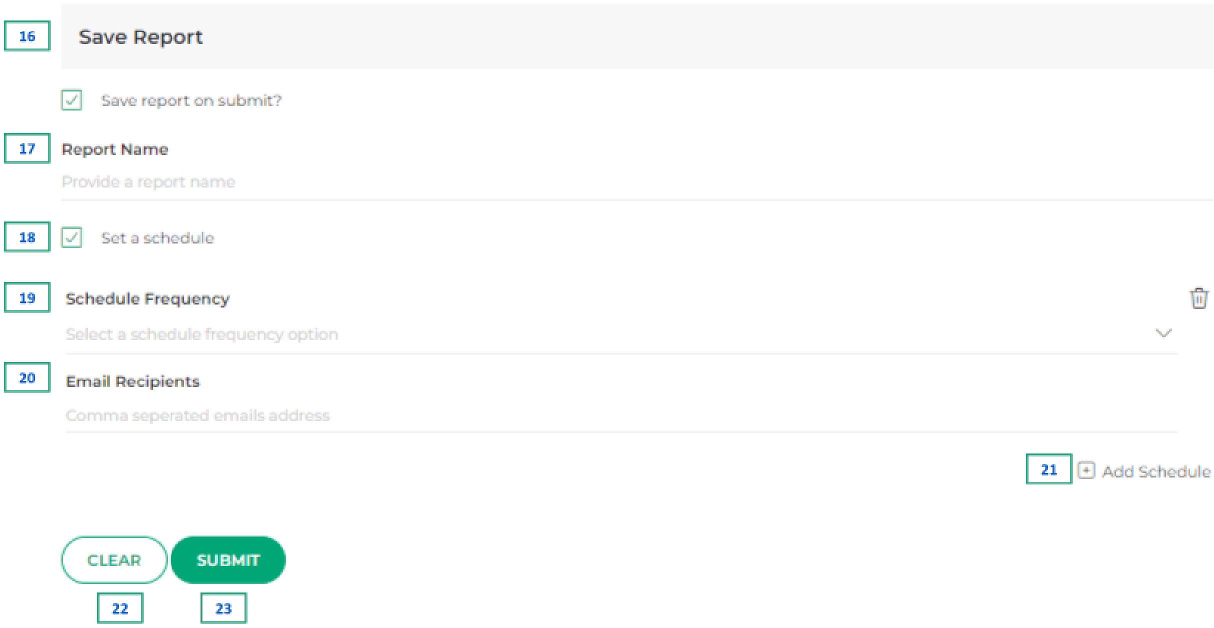
    Note: Longer time frames can be supported on an ad-hoc basis, but the longest time frame supported for scheduled reports will be 5 years.



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.



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.

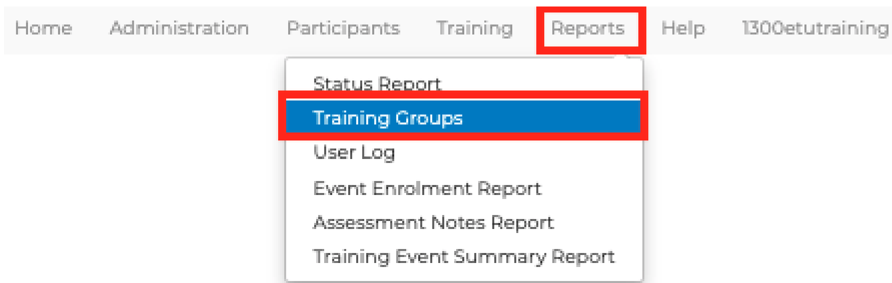
23. **Submit** - Click 'Submit' to generate the report based on the selected filters.

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.

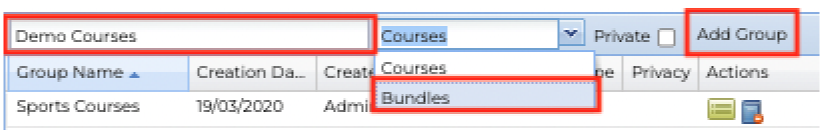
1. Click “Reports” from the menu bar on the top of the screen, followed by “Training Groups”.



2. In “Group Name”, type the name of the Training Group you wish to create.

3. Select “Bundles” from the Courses drop-down menu.

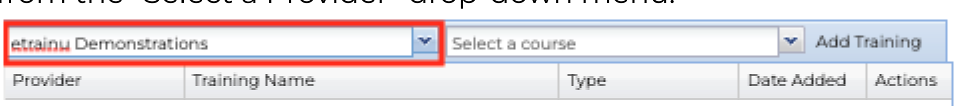
4. Click the “Private” button if you want this to remain a private group for your use only—leaving this unticked will mean all administrators can access this Training Group.



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.

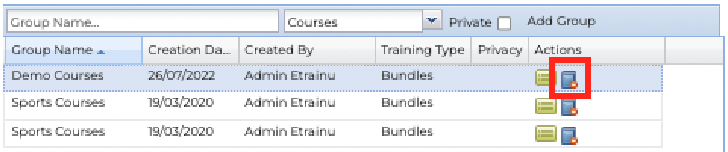
7. From here, select the content provider that supplies content to your organisation by selecting from the “Select a Provider” drop-down menu.

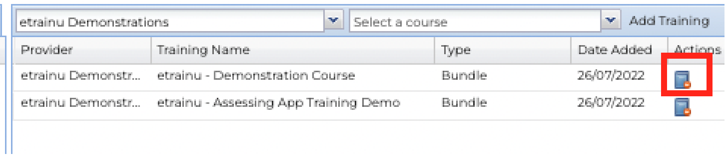


8. Select the course you wish to add to the group by selecting a course from the “Select a course” drop-down menu and click “Add Training”.

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

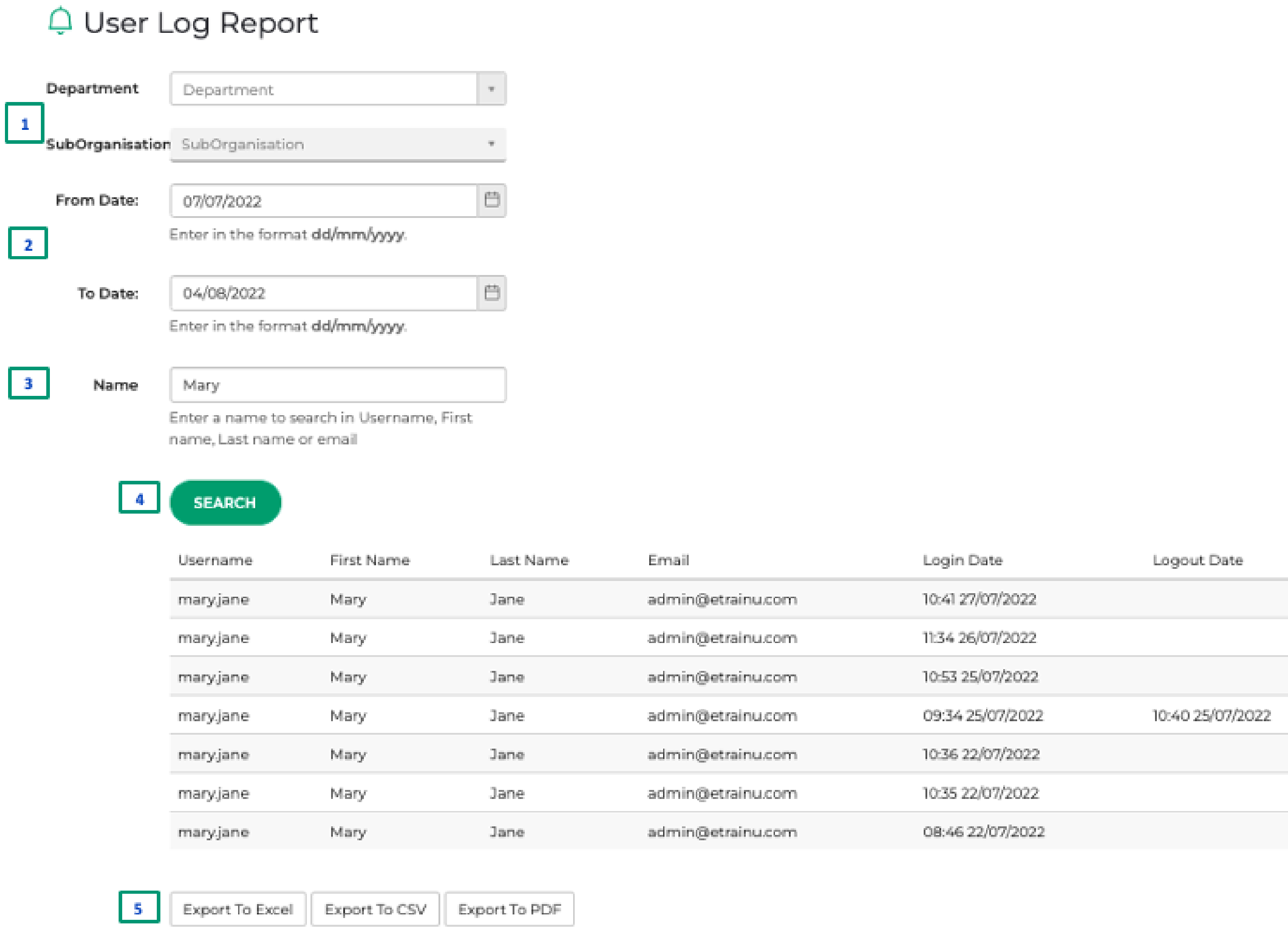
10. If, at any point, you wish to remove a training item from the group or remove the group completely, click the “archive” icon.





User Log Report

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



11. **Department/Sub-Organisation:** These fielda are optional, however you can advise the these pull data from.

12. **Department:** Advise the Department to pull data for a specific Department you have access to.

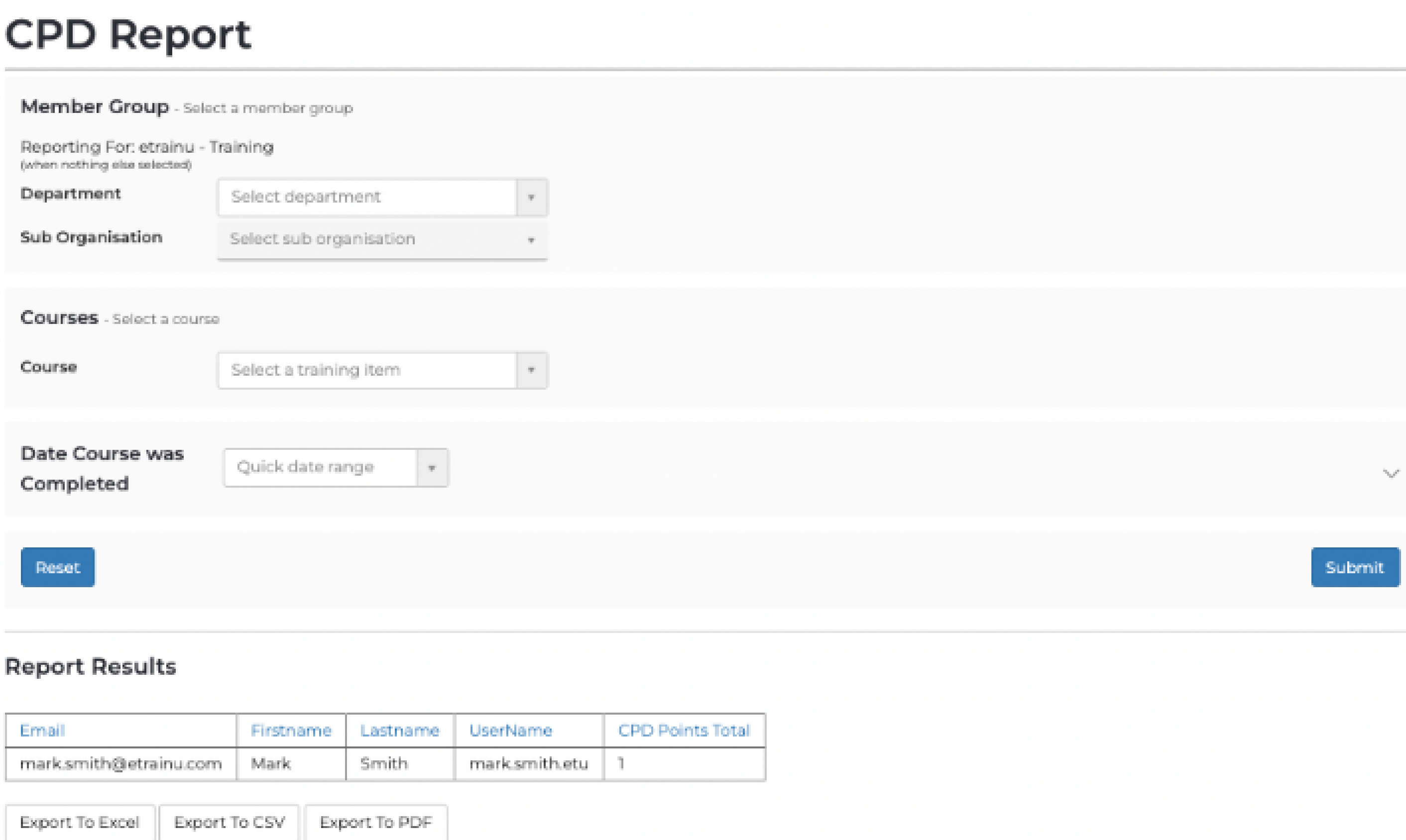
13. **Dates:** Advise dates for when you want to narrow your search down.

14. **Search:** Click "Search" to obtain your results.

15. **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.

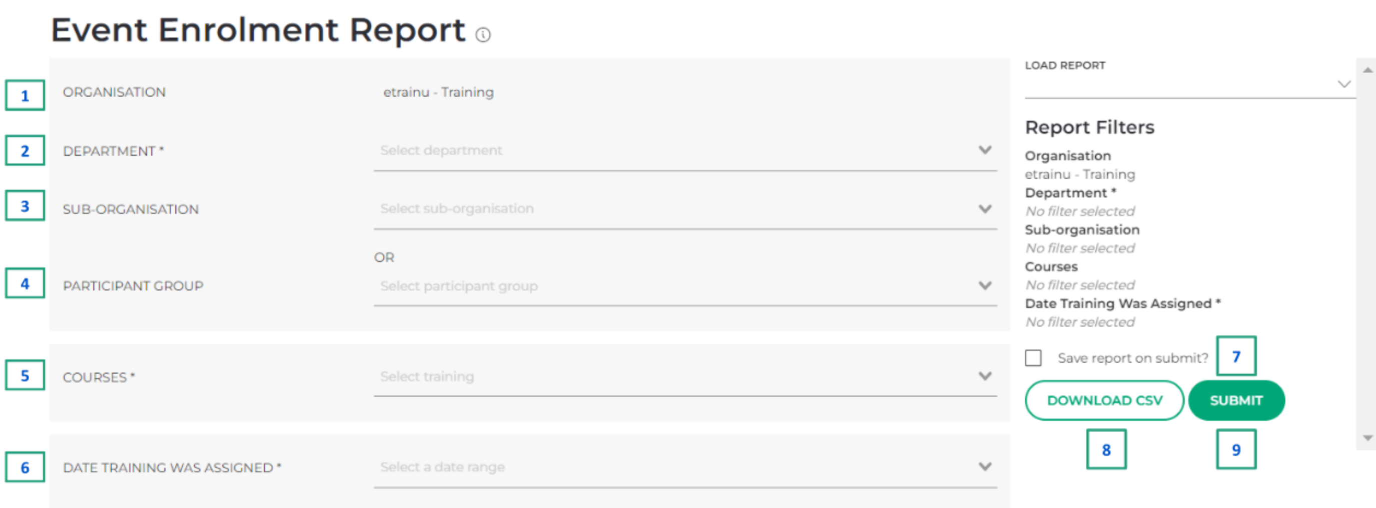


1. **Department / Sub-Organisation:** Advise the Department to pull data for a specific Department and/or your Sub-Organisation you have access to.
2. **Courses:** Select the course or courses you wish to report on.
3. **Date Course was Completed:** You can filter the report based on the date range your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

This report can be exported to Excel, CSV or PDF

Event Enrolment Report

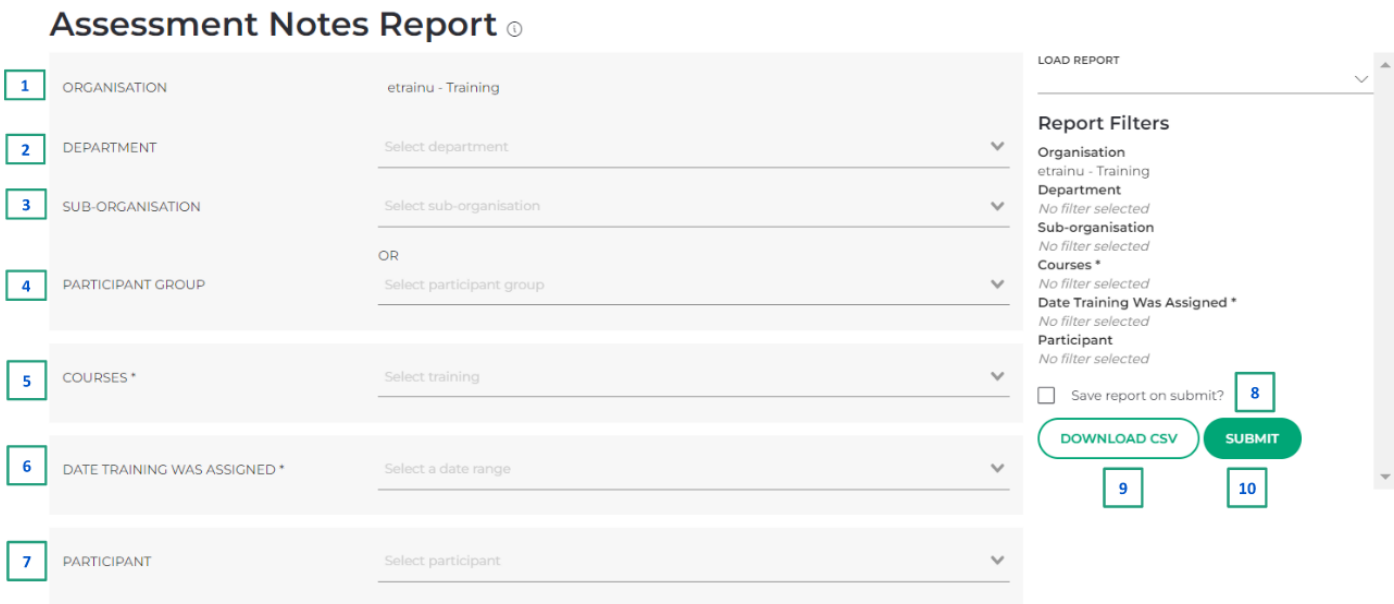
The Event Enrolment report outlines the events and the status the Participant is enrolled into. To build your report, consider the following filters:



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:



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.

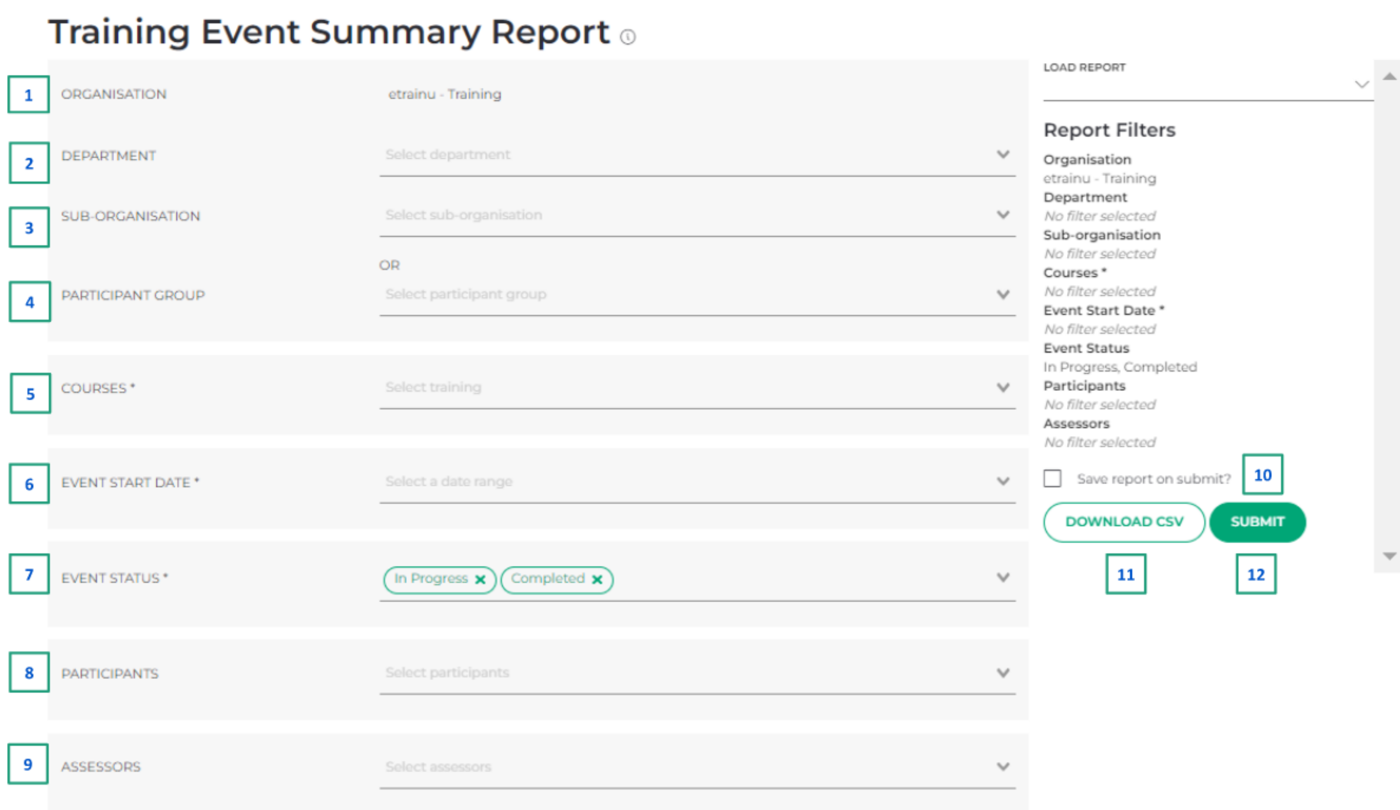
8. **Save Report:** You also have the option to save the report on the left. This functionality allows you to save the report (so you don't have to complete the above fields next time) and also set a schedule to have the report sent to a nominated email address.

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.

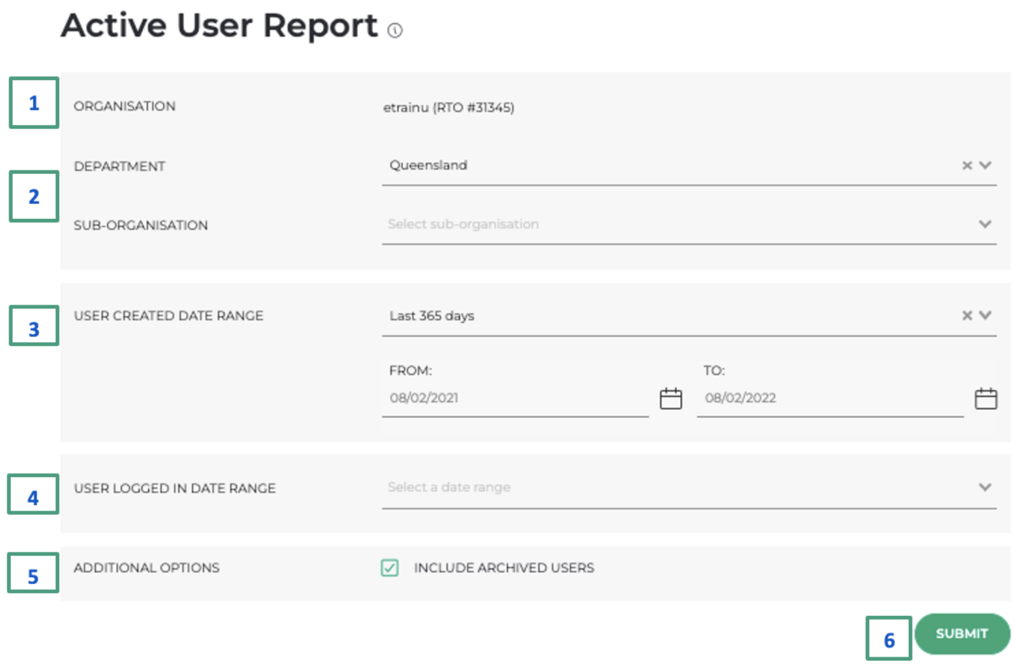
10. **Save Report:** You also have the option to save the report on the left. This functionality allows you to save the report (so you don't have to complete the above fields next time) and also set a schedule to have the report sent to a nominated email address.

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

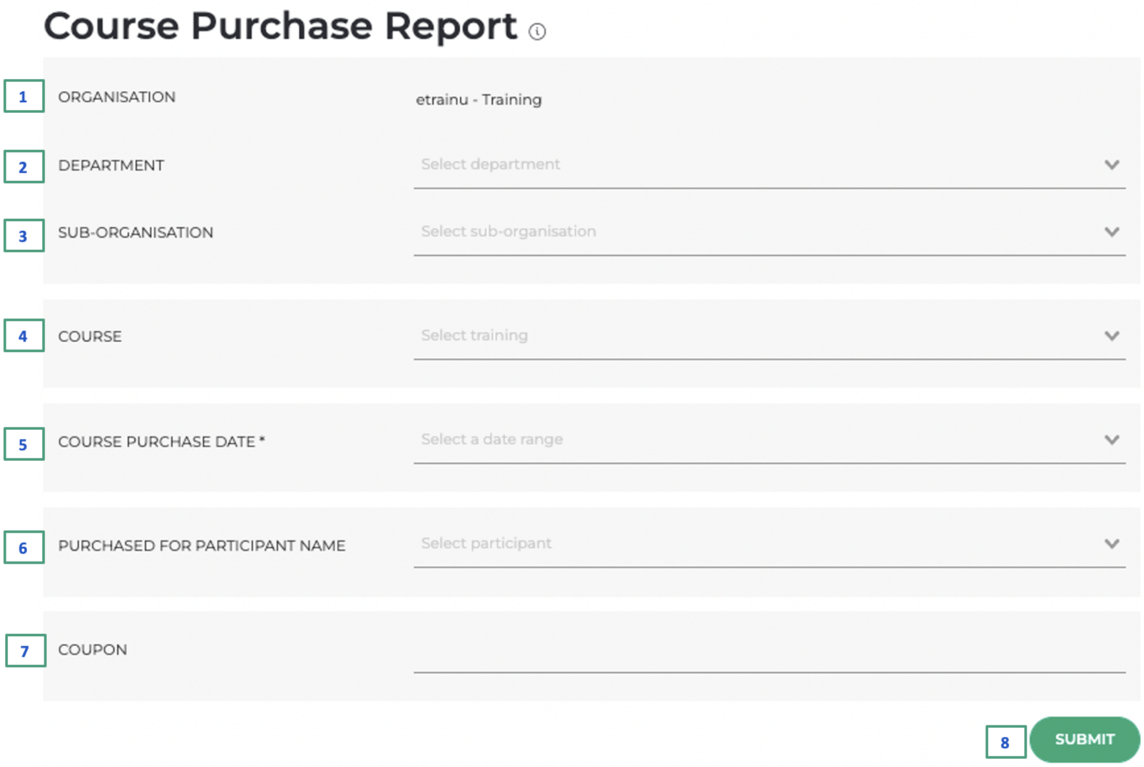
This report provides you a list of all users under your organisation.



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.



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

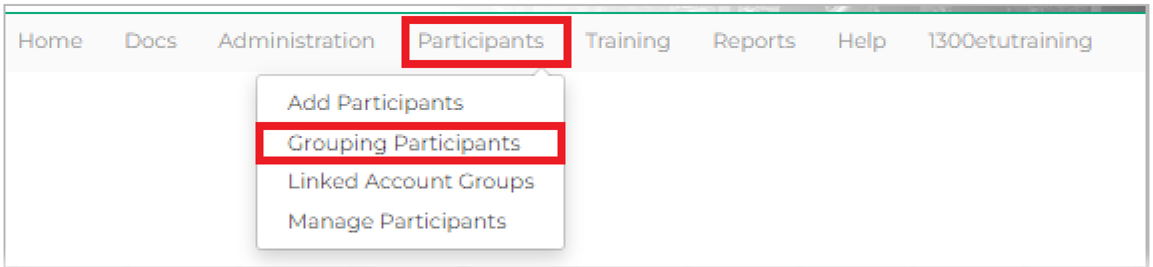
- The actual invoice can also be downloaded direct from this report- this means if needed for your records, or if a participant requests a copy, you can now self-service and download the invoice record direct from this report. Additionally, the report includes details such as the transaction ID, transaction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

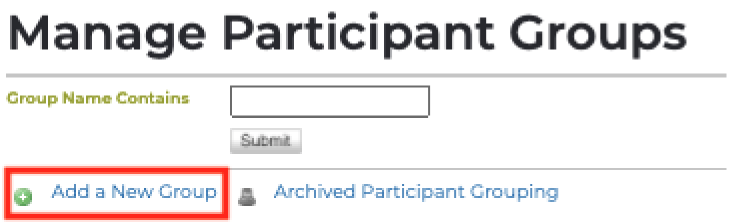
Participant Groups

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.

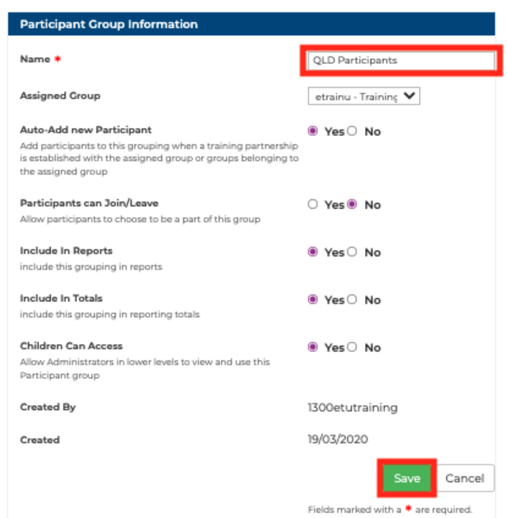
1. Click “Participants” from the menu bar on the top of the screen, followed by “Grouping Participants”.



2. Select “Add a New Group”



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

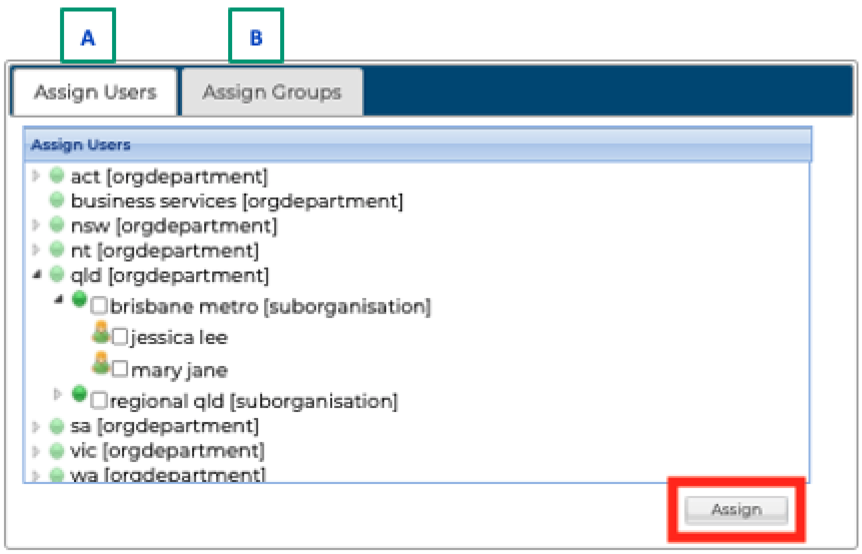


4. To add Participants to the group, click the “plus” icon.

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.

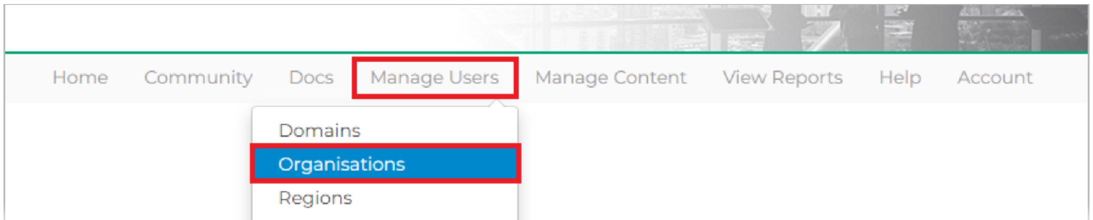
    b. If you are assigning groups, select the Department/Sub-organisation you wish to assign to the Participant Group—by using this option, it will automatically add new users as they are created within those Department/Sub-organisations.



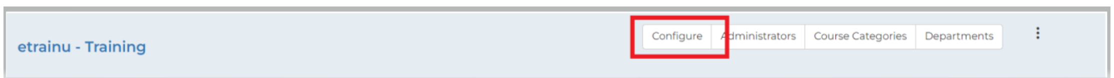
Setting default sub org for new users

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

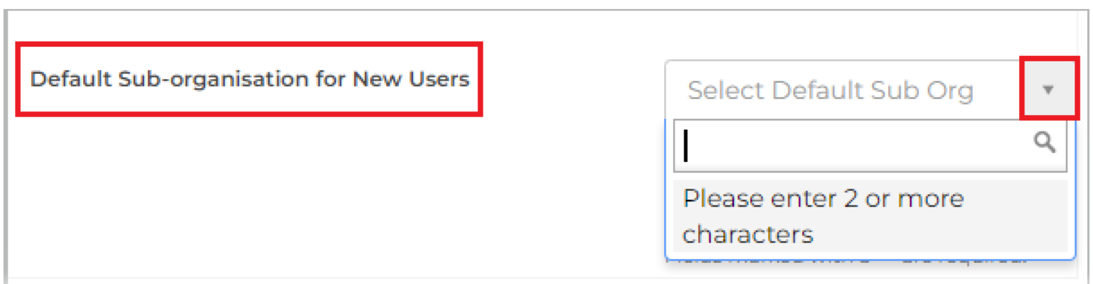
1. Click "Manage Users", followed by "Organisations".



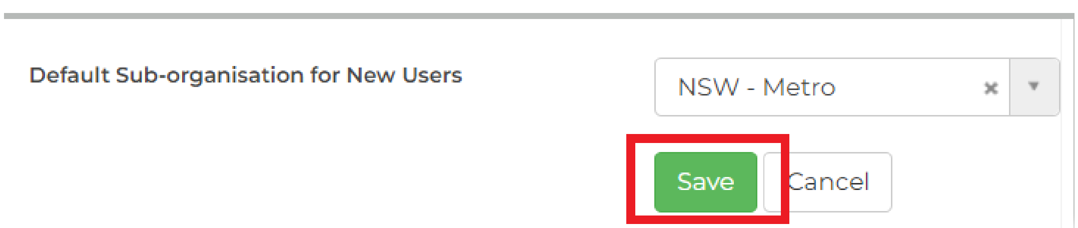
2. Search for the organisation and click "Configure".



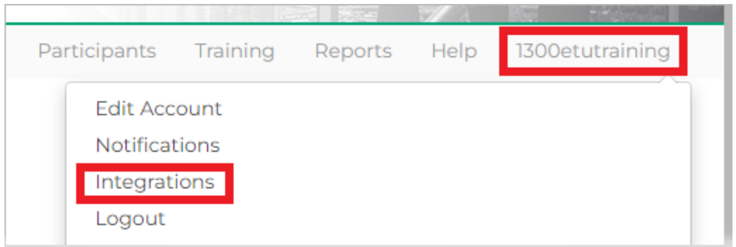
3. Scroll down and click on the drop down arrow to select the default sub org.



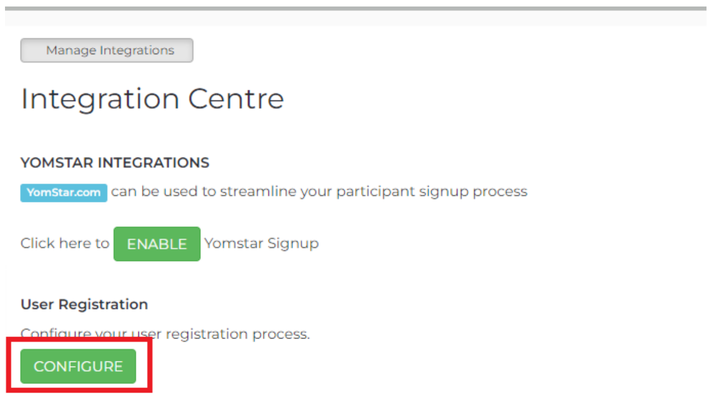
4. Once done, click on Save.



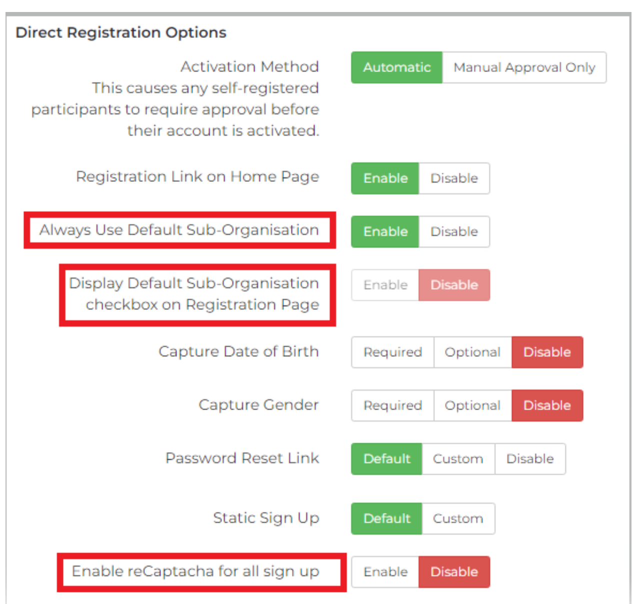
5. Once the default sub-organisation has been selected, admins can go to Integrations to configure the user registration by going to Integrations.



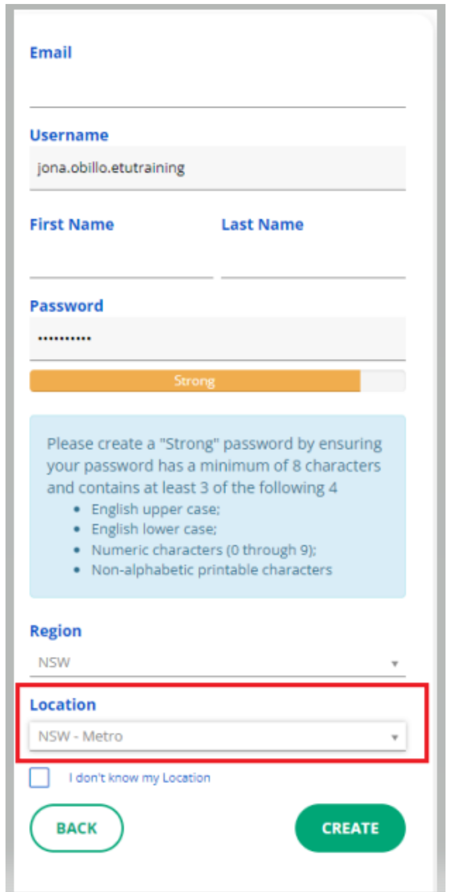
6. Then click on configure.



7. 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.



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.

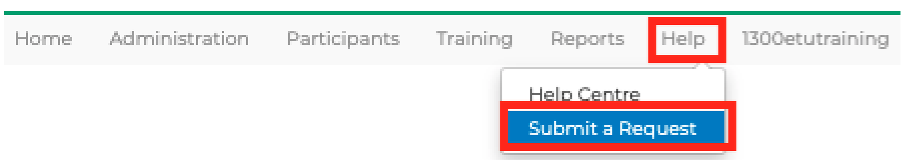
However, if you are unable to have your questions answered, please see below helpful links.

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.