



TRAIN Administrator Handbook

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Public Health Foundation



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About This Handbook

This Public Health Foundation (PHF) handbook will help administrators manage sites affiliated with the TrainingFinder Real-time Affiliate Integrated Network (TRAIN). Major responsibilities of site administrators include processing course provider registrations, managing or entering course listings, and managing access rights of individuals and groups. (See Appendix A. *Sample TRAIN Affiliate Site Administrator Job Description*.)

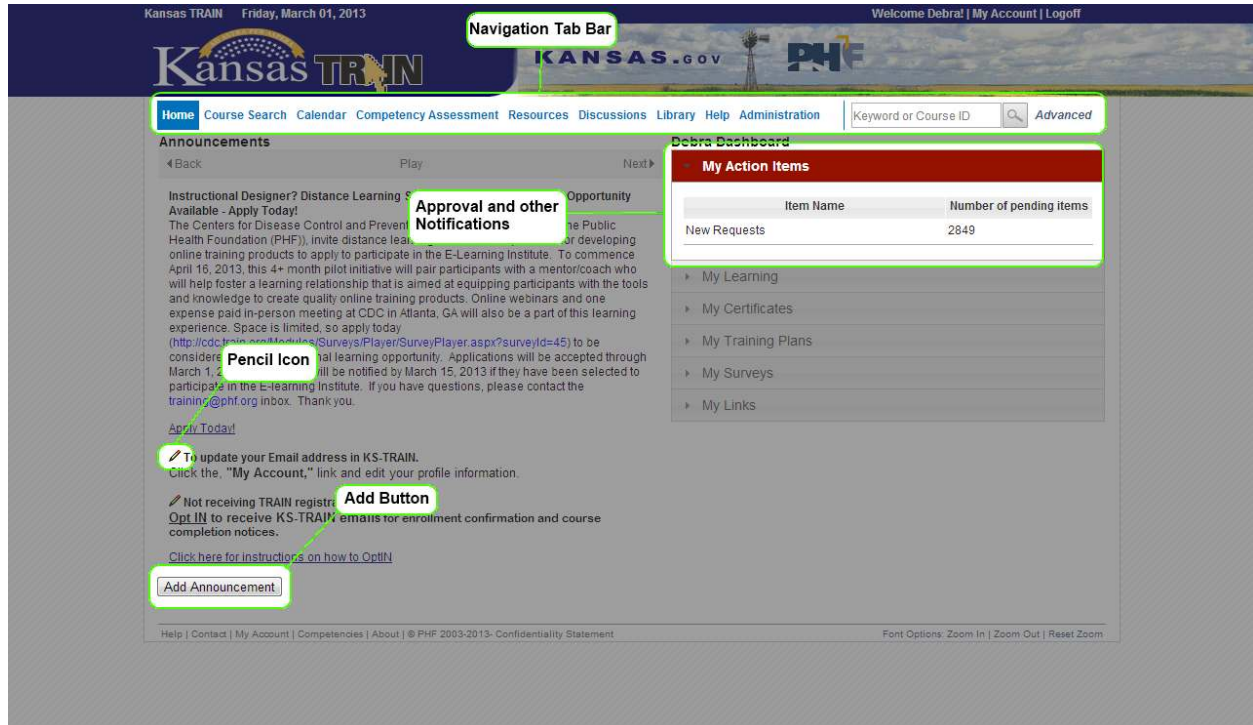
This guide is not meant for course providers, users, or any other users. PHF has created a separate reference guide for course providers. The *Course Provider Reference Guide* can be distributed directly to course providers who may be within or outside of the affiliate agency (a PDF file of the guide is available within the TRAIN Resource board – it is also emailed to all approved course providers). The *Basic Information to Provide to Users* section includes text that you can copy, adapt, and share with users in your e-mails, presentations, and trainings. This section is also available separately and is available for users to download directly from TRAIN.

New items in this release include:

- Page 121: New interface for assigning certificates to courses and conferences

TRAIN Administrative Basics

Getting Around TRAIN



As the illustration above shows, navigating through your TRAIN website is simple and straightforward. The **Navigation Tab Bar** appears on virtually every page throughout your site and allows for consistent and easy access of the major areas. As an administrator, your view of TRAIN pages is very similar to the end-user's view with four exceptions:

1. You have access to the **Administration** area through the appropriate link on the Navigation Tab bar.
2. You will occasionally see the **Add** button, which indicates that you have the ability to add various types of information.
3. You will occasionally see the pencil icon (✎), which indicates that you have the ability to edit various types of information.
4. If your administrative tasks include approvals, you will receive a notification when you have items waiting to be approved.

Pasting into the TRAIN Text Editor

Information that we want to include in course descriptions, announcements, or other parts of TRAIN often comes from another source such as another web site or a Word document. The TRAIN text editor is an HTML application, so this is fairly easy to do when the external source is a web page or a plain text file (e.g., a .txt file). Web pages use the same underlying HTML data as the TRAIN editor to format their text, and there is no underlying formatting in a plain text document. So the transition from those types of external sources into the TRAIN editor is smooth.

Unfortunately, the editor cannot understand a great deal of the underlying formatting used in Word documents because that formatting information is not stored as HTML. Thus, information pasted from Word does not often retain the look it had in the original document.

In order to copy from Word or other non-HTML based sources and not struggle with invisible, alien formatting, it is necessary to perform an intermediate step which strips out the underlying formatting information.

1. Simply copy from Word as usual.
2. Open Notepad and paste the data into a blank Notepad document.
3. Then, copy the data from Notepad and paste it into the TRAIN editor.

Since Notepad stores its data in plain-text format, any formatting that existed in the original document will be lost in this process. However, it can be easily reapplied with the editor's tools, and no foreign formatting information from the original document will exist and conflict with the formatting applied in the TRAIN editor.

Using Communications Features

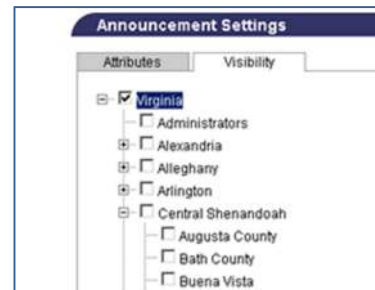
Communications Features allow administrators to post important announcements to groups of TRAIN users. You will need to be logged on to your TRAIN site to use the features described in this section.

Announcements

Announcements can be bodies of text, links or images that display on the TRAIN 'Home' page. Many administrators use the Announcements to post important information for users. Like most items in TRAIN, Announcements must have a group assignment. An Announcement's *visibility* trickles down the grouping structure for end users; however, administrative access to the announcement (i.e., the ability to edit the announcement) trickles up the tree.

Adding an Announcement

1. On the Home page, click the **Add** button to the right of the Announcement bar.
2. On the resulting page enter the announcement title and body text in the appropriate fields. Text is limited to 4,000 characters.
3. If desired, you may also include a **Read More Link** to an outside website where users can find more information. Be sure to add the entire URL starting with **http://**. In order to have text displayed as a hyperlink to your Read More URL, you may enter the text in the **Read More Link Text** field.
4. Set the expiration date.
5. Click on the **Visibility** tab.
6. Select the groups that you want to have access to the announcement.
NOTE: If you click an upper level group all sub-groups will automatically be able to see the announcement. You do not have to select each sub-group.
7. Click **Save** to finish adding your announcement.




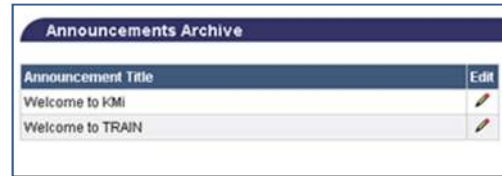
Editing a Live Announcement

1. On the Home page, click the pencil icon next to the announcement you wish to edit.
2. Change text or settings as needed.
3. Click the **Save** button at the bottom of the screen to finish editing the announcement.

Editing an Archived Announcement

Announcements are automatically stored in an archive when they expire. You may find this feature useful if, for example, you deal with recurring events with the same basic information.

1. Click the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page select **Announcements** from the menu that appears on the left hand side of the page, followed by **Archive**.
3. Click the pencil  icon next to the announcement you wish to edit.
4. Change text or settings as needed.
5. Click the **Save** button at the bottom of the screen to finish editing the archived announcement.

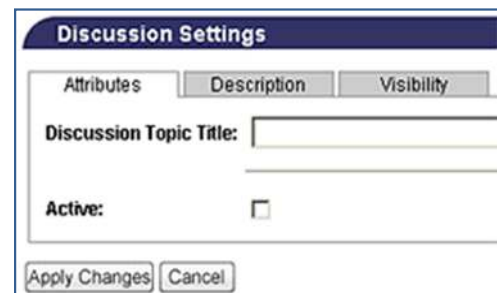


Discussions


Discussions also allow administrators to share information with their users. However, unlike announcements, discussions have conversation threads which give users the opportunity to comment and provide feedback on relevant topics.

Adding a Discussion Topic

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Discussion** from the menu that appears on the left hand side of the page. You will automatically be routed to **Add/Edit topics**, however you may also select this option from the menu.
3. On the resulting page, click the **Add Discussion** button.
4. On the resulting page, enter the discussion topic title and check the **Active** box if you wish to make the new discussion available for use.
5. Next, click the **Description** tab and enter a brief description of the discussion topic in the field provided. If you wish to use HTML coding to format your description, check the **HTML Mode** checkbox.
6. Next, click on the **Visibility** tab and select the groups you want to give access to participate in the discussion.
NOTE: If you click an upper level group, all sub-groups will automatically be able to participate in the discussion. You do not have to select each sub-group.
7. Click **Save** to finish adding the discussion topic.



Editing a Discussion Topic

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Discussion** from the menu that appears on the left hand side of the page. You will automatically be routed to **Add/Edit topics**; however you may also select this option from the menu.
3. Click on the pencil  icon next to the discussion topic that you wish to edit.
4. Change text or settings as needed.
5. Click the **Save** button at the bottom of the screen to finish editing the discussion topic.

Resources

Adding a Resource Category

The Resource Category feature allows administrators to add resources to the TRAIN site:



add


1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Resources** from the menu that appears on the left hand side of the page.
3. Next, click the **Add** button.
4. On the resulting page, enter the document topic name title and check the **Active** box.
5. Indicate whether the category will be a top-level category or whether it should appear as a sub-level category under another topic.
6. Next, click on the **Visibility** tab.
7. Select the groups you want to grant access to the resources.

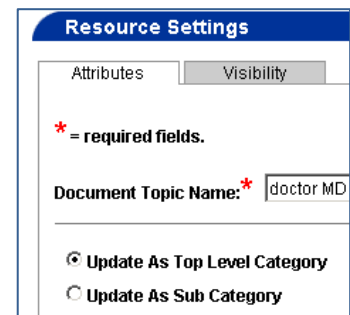


NOTE: If you click an upper level group, all sub-groups will automatically be able to see the resources. You do not have to select each sub-group.

8. Click **Save** to finish adding the resource category.

Editing a Resource Category

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Resources** from the menu that appears on the left hand side of the page.
3. Click on the pencil  icon next to the resource category that you wish to edit.



4. Change text or settings as needed.
5. Click **Save** to finish editing the resource category.

Spotlight

Adding a Spotlight Link

The spotlight link feature allows administrators to highlight events or links to other websites.



1. Click the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Spotlight** from the menu that appears on the left hand side of the page.
3. On the resulting page, click the pencil icon that appears next to Spotlight.
4. Scroll down and click the **Add** button.
5. On the resulting page, provide the necessary information. It is not necessary to alter the **Window Parameters** field.
6. Click the **Visibility** tab and select the groups that you wish to grant access to view the spotlight link.

NOTE: If you click an upper level group, all sub-groups will automatically be able to see the spotlight link. You do not have to select each sub-group.
7. Click **Save** to finish adding the spotlight link.

Editing a Spotlight Link

1. Click the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Spotlight** from the menu that appears on the left hand side of the page.
3. Click the pencil icon next to the item you wish to edit.
4. Change text or settings as needed.
5. Click **Save** to finish editing the spotlight link.
6. To change the order in which the links appear in the **Spotlight** menu, click the appropriate arrow in the **Move** column.
7. To delete an item, click the "X" next to the item you wish to delete.

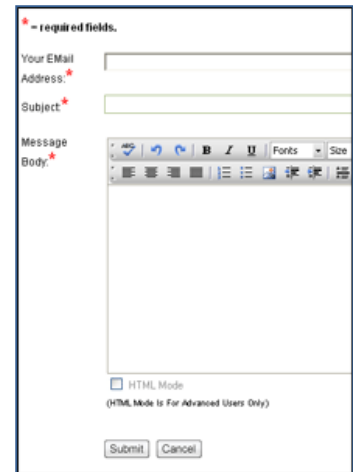


E-mail Utility

The E-mail utility allows the administrator to conveniently send an e-mail to any number of TRAIN users. The administrator can send a message to selected individuals or to all the members of a chosen group.

Sending an E-mail to TRAIN Users

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Utilities** from the menu that appears on the left hand side of the page.
3. Under **Utilities**, select **E-mail Utility**.
4. To locate users to whom you wish to send an e-mail message, select the group or sub-group to which they belong.
5. All users of the selected group will then be listed underneath the **Groups** heading. In order to list all members belonging to the sub-groups of your chosen group, check the **Show Users in Sub-Groups** box at the top of the page.
6. Next, select the checkboxes next to the users to whom you wish to send the e-mail message. If you wish to send an e-mail to all users of a group, check the **All Users** box that appears above the listing of users.
7. Compose your e-mail message by completing the **Your E-mail Address**, **Subject**, and **Message Body** fields on the provided form. If you wish to use HTML coding to format your description, check the **HTML Mode** checkbox.
8. Click **Submit** to send your e-mail message. You will be asked to verify the submission. Click **Yes** to continue. The page will refresh providing you with confirmation that your e-mail was successfully sent to all selected users.

A screenshot of the e-mail composition form. It features a red asterisk icon and the text '* - required fields.' at the top left. The form includes three input fields: 'Your EMail Address*', 'Subject*', and 'Message Body*'. The 'Message Body*' field has a rich text editor toolbar above it with options for bold, italic, underline, font color, font size, bulleted list, numbered list, link, and unlink. At the bottom of the form, there is an unchecked checkbox for 'HTML Mode' with the text '(HTML Mode is For Advanced Users Only)' below it. 'Submit' and 'Cancel' buttons are located at the bottom right.

E-mailing Course Registrants

This utility module allows you to conveniently send an e-mail to any number of TRAIN users who are registered for a particular course, or courses. This feature is also available to email users on the Wait List for a course (however, this must be done from the **Course Roster**, not the **Email Utility**). To use the utility:

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Utilities** from the menu that appears on the left hand side.
3. Under **Utilities**, select **E-mail Course Registrants**.

- You will be presented with a list of available courses, broken down into pages. To view all courses on one page in one list, simply uncheck the **Break into Pages** checkbox. The screen will refresh automatically.
- To add a course to your Selected Courses list, simply click the **Add** button to the left of the course name. The **Selected Courses** list represents the pool of courses from which you will be able to select users to receive your e-mail. When you have completed your list of **Selected Courses**, click **Next** at the bottom of the page to continue.

Selected Courses		
Selected Courses	Provider	Course Format
<input checked="" type="checkbox"/> Break list into pages		
Please select courses out of the following list		
Available Courses	Provider	Course Format
<input type="button" value="Add"/> Keeping the 'Genome' in the Bottle: Reinforcing Biosafety Level 3 Procedures	CDC	Webcast (on demand)
<input type="button" value="Add"/> Bioterrorism Preparedness 101	Illinois Public Health Preparedness Center	Other
<input type="button" value="Add"/> Bloodborne Pathogens Exposure Control Course	Texas Department of State Health	On-Site - Classroom course

- If any of your selected courses are **Live Event** courses (meaning they contain sessions) you will then be asked to select the sessions from which you would like to pull registered users.
- Each Live Event Course selected will be displayed with all the course sessions listed underneath the Course Name (see image below). To add all of a particular course's sessions, simply click the **Select All** button under the Course Name. To select an individual session or sessions of a particular course, simply click the checkbox in the **Select All** column next to Location Name. When you have a check next to all sessions you wish to include in your search for users, click **Next**

- Select sessions and click 'Next' button to choose users.

Course Name: DVD				Provider: Bioterrorism Consortium	Format: On-Site - Classroom course or workshop
<input type="button" value="Select All"/>		<input type="button" value="Unselect All"/>			
	Location	Date	Distance		
<input type="checkbox"/>	BC	3/31/2005 1:00 PM CT (expired)	403		
Course Name: test live event				Provider: kmli	Format: On-Site - Conference
<input type="button" value="Select All"/>		<input type="button" value="Unselect All"/>			
	Location	Date	Distance		
<input type="checkbox"/>	Adam	1/10/2008 12:00 AM ET	1150		
Course Name: Nurse Leadership				Provider: Department for Public Health	Format: On-Site - Conference
<input type="button" value="Select All"/>		<input type="button" value="Unselect All"/>			
	Location	Date	Distance		
<input type="checkbox"/>	Holiday Inn	5/5/2006 9:00 AM ET	156		
<input type="checkbox"/> Break list into pages					
<input type="button" value="Back"/>		<input type="button" value="Next"/>			

have selected which sessions to include, TRAIN will put together a list of all users who have registered for the courses (and sessions where applicable) you have selected.

9. The list of users will be presented in alphabetical order along with information about their registration, including: Course Name, Date Registered, Course Provider, Course Format, Course Status (in-progress, withdrawn, etc), and Location and Session Date (where applicable).
10. You may either click the **Select All** button at the top of the page to include all the available users in your e-mail, or you may select users individually by clicking the checkbox next to the user's name. By default the user list is broken into pages (10 users per page). To flip from page to page, simply click a numeral link at the bottom of the page. To view all users on one page, simply uncheck the **Break Into Pages** checkbox.
11. Once you have selected all the users you want to receive your e-mail, click **Next** at the bottom of the page.
12. For verification purposes, all selected users will be displayed in a list at the top of the page. If you need to make any changes to the recipient list, simply click **Back** and modify the pages of selected users.
13. To send your e-mail, simply fill out the Subject and Body forms, add any necessary attachments and click **Send Mail**.
 - a. To add an attachment, first click the **Browse...** button.
 - b. Find the file you wish to upload in the **Choose File** window, and click **Open**.
 - c. Click **Upload**, next to the browse button.
 - d. Your attachment will upload into TRAIN and be listed under the **Attachments** text.
 - e. You may continue to add attachments through the same process. If you wish to delete an attachment from the list, simply click the blue X next to the attachment name.
14. A verification message will be displayed indicating that your e-mail has been successfully sent.

Using the Library

The Library is a custom Learning Content Management System that provides a centralized repository for learning objects. Users have access to a variety of learning objects such as multimedia clips, images, HTML text, and any other objects.

The basic functionality of the Library is similar to the Resources module with a few additions:

1. Library Content is not directly available to users. The Library module can only be accessed by users with a designated Library Manager role.
2. Library content can easily be linked to – HTML links can be used in announcements, resources, spotlight links and course content.
3. Version controls and archiving capabilities store previous versions of content.


Creating an Library Category

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Library** from the left hand navigation.
3. Next, click the **Add Category** button.
4. On the resulting page, enter the Library topic name and check the **Active** box.
5. Indicate whether the category will be a top-level category or whether it should appear as a sub-level category under another topic.
6. Finally, set the **Visibility** of your Library Category and click **Save**.



NOTE: If you click an upper level group, all sub-groups will automatically be able to see the Library Category. You do not have to select each sub-group.

Editing an Library Category

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Library** from the menu that appears on the left hand side of the page.
3. Click on the pencil  icon next to the Library Category that you wish to edit.
4. Change text or settings as needed.
5. Click **Save** to finish editing.


Adding a Library Item

1. Click on the **Library** tab, located in the **Navigation Tab** bar.
2. Next, click the **Add** button.
3. On the resulting page, enter the Library Item name, select the item Category, and add a description for your item.
4. Next, select whether you intend to upload a file, or enter a URL as the source for your item.
5. If uploading a file, simply click the **Browse** button to find the file on your machine. If entering a URL, simply type in the entire URL into the text area.
6. Finally, set the Visibility of your Library item and click **Save**.

Managing a Library Item

In order to update your Library item, you must first check-out the item for edit. Once you have checked the item out, you are then able to upload a new file or URL that will replace the old item. The newly uploaded file will now be the live version, and will be the file/URL that is accessible to users who might have been given a link to the Library item. The old version will be kept in TRAIN so that at any point in time you can review past versions of the Library item.

Editing a Library Item:

1. Click on the **Library** tab, located in the **Navigation Tab** bar.
2. Click on the Library Category where your item is located.
3. Click the pencil  icon to open your item for edit.
4. From the **Edit Library Item** page you can:
 - a. Click the **Check Out** button to check out the item for edit. This will allow you to upload a new file or enter a new URL as your Library item.
 - b. Click the **Copy to Clipboard** button. This will copy the TRAIN-URL of your Library item to your computer's clipboard allowing you to paste the location of your item (Ctrl+V) wherever you might need it. Some examples might be: copying the URL into an e-mail, adding a Resource with a link to the Library item instead of a direct link to the item itself, or adding a Spotlight link using your Library item.

Library Item Name	Date
 Admin Handbook (.pdf) This is the full Administrator Handbook that is given to state administrators.	06/27/2013
 Course Provider Handbook (.pdf) This is the Course Provider Handbook that gets emailed to all users approved for Course Provider status.	08/12/2013

Upload File
 URL to Browse

Tip: To update the item content you need to check the document out.
Tip: Checked out document is not available for updating to other users. Please try not to keep it checked out for a long time.
Tip: To view previous versions of the document click History.

Uploaded Document: KMI_TESTING.doc

To copy the URL of the document to the clipboard click:

To view the history of your Library item, simply:

1. Click the **History** link from the **Edit Library Item** page.
2. Click the **Page** icon from the LCSM Item Name list after selecting a Library Category.
3. The Library History page will display an active link to all past versions of your Library
4. item. It will also give you the name of the user who established the version as well as the date the version was established, the version number, and the size of the file.

Calendar Events

Adding Non-TRAIN Events to the Calendar

NOTE: This module is only available to affiliates who have purchased the Calendar. If you have any questions regarding the Calendar please contact PHF.

The Non-TRAIN Events module allows an administrator to post upcoming events that do not fall into the category of a formal course. These events will be displayed on the Calendar to all users who have the correct group-assignment, based on the Visibility assigned to the event. These events, if assigned solely to the top 'State' level group, will now also be visible to anonymous or guest users of the same state.

TO POST A NEW EVENT:

First you must access the new Non-TRAIN Events module. To do so:

1. Log on to your TRAIN site.
2. Click on the **Administration** tab in the Navigation Bar.
3. On the resulting page click on **Non-TRAIN Events** link in the left-side list menu.

TO ADD A NEW EVENT:

1. Click the **Add Event** button.
2. Fill out all required fields in the form provided (all fields marked with a Red Asterisk are **required**).
3. Click the **Visibility** tab and select the Group in order to define which users will be able to see the event.
4. Click **Save** to submit the event.


Viewing and Modifying Events via Administration:

All events are entered as **Pending** and need to be approved by a **Non-TRAIN Event Manager** before they will be displayed on the Calendar or in the TRAIN homepage **Upcoming Events** portion. Once a manager approves the Event, the event status will change to **Approved** and will immediately be displayed to users in the Calendar or in the TRAIN homepage **Upcoming Events** portion.

TO VIEW YOUR EVENTS BY THEIR STATUS:

1. Access the Non-TRAIN Events module.
2. Check or uncheck the appropriate checkboxes.
 - a. To view events that took place in the past (i.e. **Expired Events**) make sure the **Show Expired Events** checkbox is checked.
3. Click **Refresh**.

TO EDIT A NON-TRAIN EVENT:

1. Click the pencil  icon in the same row as the Event.
2. Make any changes necessary to the forms or visibility settings.
3. Click **Save**.

TO DELETE A NON-TRAIN EVENT:

1. Click the blue “X” icon in the same row as the Event.
2. Click **Ok** to confirm the deletion.
 - a. Deleted Events will immediately be pulled from view in the Calendar.
3. Click **Cancel** if you do not want to delete the event.

Viewing Events via Calendar

All non-TRAIN events that have been **Approved** will be displayed on the Calendar; as of Jan 2008, non-TRAIN events will display in the Calendar for anonymous users if that event is visible at the top ‘State’ level. Users will only be able to see Events they have access to, based on both their Group assignment and the Event’s Visibility Assignment. To view events:

1. Click the **Calendar** tab in the Navigation Bar
2. Navigate to the appropriate Month or Date.
3. Click the Title of the Event to view the Event Details.

Managing Users

Account Creation

The TRAIN system presently allows for three forms of user enrollment:

1. Self-registration – the user creates an account for him/herself from the login page.
2. Individual registration by an administrator – the administrator creates an account for the user in TRAIN.
3. Importation of bulk data from an Excel sheet (See **Upload Users** and **Batch Registration**).

Individual Account Creation by an Administrator

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Users** from the menu that appears on the left hand side of the page.
3. Then, click the **User List** submenu item that appears beneath the **Users** menu item.



Add User Form

4. Click the **Add User** button.
5. Fill out all the information for the user as completely as you can. All fields marked with a red asterisk (*) are required fields for adding a new user. The user will be prompted to complete any additional required information during their first TRAIN session.
6. To assign or edit a user's group membership, simply select the **Groups** tab from the **Edit User** interface. Then, use the + to the left of the grouping tree to expand the grouping structure. Finally, use the checkboxes to the left of the grouping tree to assign the user to a group. Multiple groups assignments are acceptable; however, this might necessitate that you or the user select which of these groups is their **primary groups** and which are **secondary groups**.
 - a. User group assignments will control what content the user has access to (from announcements to learning assets, group assignment determines user availability). Administrators will only be able to assign users to groups for which they (the admin) also have the **User Account Manager** role assigned; this includes all subgroups of the groups for which the admin has the role assigned.
7. To assign a user's **primary group**, first, assign the user (as described above) to multiple groups of the same category (e.g., a user might be the nursing coordinator for two different counties and therefore is assigned to two groups categorized as county) and click the **Save** button. This will cause the page to reload. At the bottom of the page there is now an **Edit Primary Groups** button.

Clicking this button will reveal an option to choose what group is that user's primary group; you can only choose one. When done, click **Continue** to return to the **Edit User** interface.

- a. The system is designed to limit the primary group choices to only those necessary. That is to say, it will only consider sets of groups that share a category. If multiple groups share multiple categories and these groups occur at different levels and sublevels within the TRAIN grouping structure, the primary group assignment options will be limited to those groups lowest in the (i.e., those which are most detached from the top level groups categorized as State).

NOTE: If a primary group selection is available but is not set by the administrator, that choice will be presented to the user when they login.

8. Assigning user **professional roles** is entirely similar to assigning user **groups**; however, user professional roles are not mandatory. Professional roles are located under the **Profile** tab.
 - a. Some role selections may require you to select additional information from the dropdown menu to the right.
 - b. Like group assignments, if a user is assigned multiple professional roles from the same category, the option will exist to select one of those roles as their **primary professional role**.
9. Selecting a **primary professional role** is also similar to the **primary group** functionality. Within the **User Edit** interface, at the bottom of page under the **Profile** tab, there will be (if appropriate) an **Edit Primary Attributes** button. Clicking this button will reveal a dropdown menu from which you can select a primary professional role for the user. When done, click **Continue** to return to the **Edit User** interface.

NOTE: If a primary group selection is available but is not set by the administrator, that choice will be presented to the user when they login.

10. Click **Save** at any time in the **Edit User** interface to save your progress. Click **Save and Back** to save your progress and return to the **Users** list. Click **Cancel** to return to the **Users** list without saving.

Verifying Attendance and Withdrawing Users from Courses

Verifying user attendance to many types of courses will be automated by the TRAIN system. SCORM compliant courses will, by their nature, be tracked if the course provider has set up the appropriate connections with TRAIN. Course providers will also have the ability to enable user self-verification for their own courses if they so choose. Some manual verification by an administrator will, in certain circumstances, be required. There are two methods for manual verification of attendance, one from the user perspective and one from the session perspective.

Verifications and Withdrawals from the User Perspective:

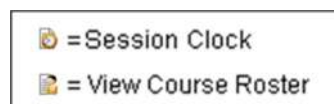
There are instances where the Course Attendance Manager will be asked to verify an individual's completion of a course. In order to Verify or Withdraw a user:

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page select **Users**, followed by **Verifications** from the menu that appears on the left hand side of the page.
3. Select the groups or subgroups in which you wish to search for the user, enter the user's last name in the appropriate field, and click **Show Users**.
4. The page will refresh with a list of all users matching your search criteria, displayed by both their Login Name and their first and last name. Click the **Show Courses** button next to the user you wish to verify.
5. On the resulting page, you will have the opportunity of verifying attendance or of withdrawing the user from the course by clicking the appropriate check box.
6. Once you have finished your updates, click **Back** to save your changes and return to the user list.

Verifications and Withdrawals from the Session Perspective:

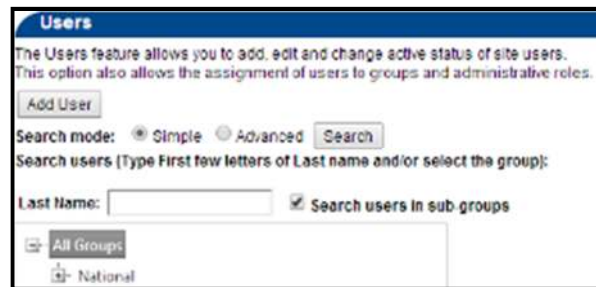
Course Session Managers and Course Providers have the ability to verify attendance or note withdrawals for all attendees of a given session.

1. Click on **Administration** on the **Navigation Tab** Bar.
2. On the resulting page, select **Courses**. The **Course List** should display as the default sub-menu. If not, then click **Course List** from the menu that appears on the left hand side of the page.
3. Be sure the list is displaying **Approved** courses. If not, check the box next to **Approved** and click **Refresh**.
4. Click on the clock icon to view the course sessions, or the Roster icon to view sessions of Live Event courses, or go directly to the Roster for non Live Event courses.
5. If a Live Event course has been selected, locate the session location you wish to view and click on its title.
6. Towards the bottom of the Session Details page, click **View/Update the Session Roster**. This will bring up a list of all registered users.
7. Select **Verified** or **Withdrawn** as appropriate for each user.
8. You may also update/change the Credit Type associated with any registered learner



Locating User Information

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Users** from the menu that appears on the left hand side of the page, and then select the **User List** link which appears when the **Users** menu expands.
3. On the resulting page, you will be provided two Search modes for locating user information.



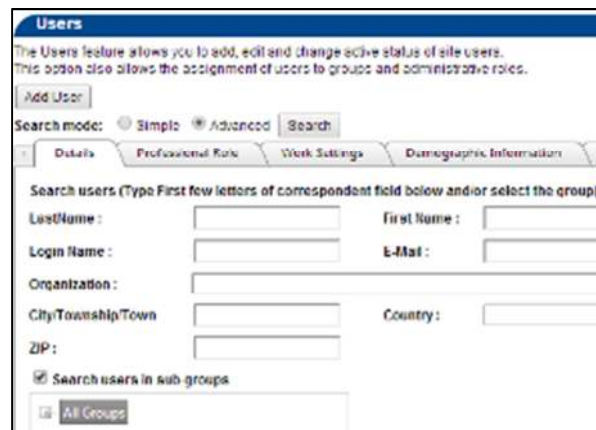
Locating User Information

Simple search mode (default selection)

1. Select the group or subgroup in which you wish to search for the user by clicking the name of the group. Group names which are preceded by a **+** symbol contain subgroups; you may click the **+** symbol to view the subgroups.
2. If you wish to search all subgroups of a selected group, ensure the **Search Users in Sub-groups** box is checked.
3. Optionally, to further narrow your search, type the last name of the user you are searching for in the **Last Name** text field.
4. Click the **Search** button. Any matching users will appear in a list farther down the page.
5. Note that searches are limited to 500 results. If your search would have returned more than 500 users, TRAIN displays a message above the list of users asking you to refine your search.


Advanced search mode

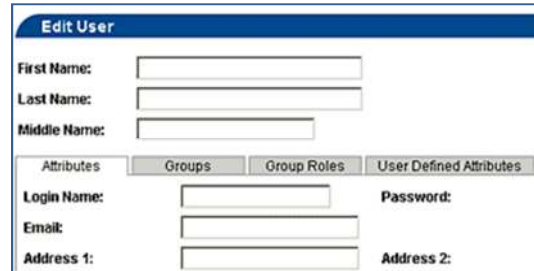
1. Click the Advanced option next to **Search mode**.
2. When the page refreshes, there will be at least 4 tabs you may select from to enter search parameters:
 - Details (allows you to search by user's first/last name, login name, email address, organization, city, country, zip code, or group assignments)
 - Professional Role
 - Work Settings



- Demographic Information
 - Other tabs containing your affiliate's user attributes, if any, will also be present.
3. You may use search criteria on as many fields and on as many tabs as you like. Note, however, that TRAIN will only find users who match every criterion entered.
 4. Click the **Search** button. Any matches will appear in a list farther down the page.

Editing User Information

1. Complete the steps outlined in the **Locating User Information** section on the previous page.
2. Click the pencil  icon next to the name of the user whose information you wish to edit.
3. On the resulting page, change text or settings as needed.
4. Click the **Save** button to finish editing user information.



NOTE: To remove a user's ability to log into and user TRAIN, uncheck the "Active" checkbox and click "Save." The user's account will then be turned off, and the account will be considered "Archived."

User Archives

1. Any account that has been de-activated is considered **Archived** and can be found in the User Archives.
2. To find Archived users, simply click the **Administration** tab, then **Users**, then **Archive**.
3. The **User Archive** functions exactly as the **Users** module. The only difference between the two is the fact that **Users** deals with active accounts, while **Archive** again deals with inactive accounts.
4. To re-activate an account, simply open the user account to the **User Edit** screen and re-check the **Active** box. Once you save the change the user will have immediate access to TRAIN and the account will once again appear in the **Users** module as an active user.



User Upload

User accounts can be created through an Excel upload. Starting in August 2008, user accounts can also be *updated* using an Excel upload.

In order to upload/update users into TRAIN using the Excel upload template, simply:

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. Click **Users** and then **Upload Users**.
3. You will first need to download the **Upload Template** excel sheet, which is provided to you by the **Download Template** link.

4. The template provides you with all fields that you are able to fill out for each new user account. All fields highlighted in **red** are required, and the user upload will fail without them.
 - a. The first column (A) of the template is the 'UserID' column. All *existing* TRAIN users have a UserID. When updating an account versus creating a new account, you will need to include the UserID in this column. TRAIN uses the UserID info to determine which user account should be updated.
 You can obtain UserIDs by running reports and exports. It is important that your UserIDs stay aligned with the correct user, else the wrong account will be updated.
Note: UserIDs can also be found on the Edit User Account page.
 - b. You can also create your own Excel upload sheet. However, this sheet *must* include all fields in **red** on the downloadable template. If the sheet you create is intended to update users, then it must also include a UserID column. Note that you can upload and update users from the same upload sheet.
 - i. Accounts in the uploaded excel sheet that have a Valid **User ID** will have their information **Updated** with the information provided in the template.
 - ii. Accounts in the uploaded excel sheet that have an non-existing or invalid (see General Notes below) User ID will have no action taken, though they will be flagged appropriately in the "Check Uploaded Data" screen.
 - iii. Accounts in the uploaded excel sheet without any User ID will be treated as a New User Account and will be treated as they are currently.
 - c. User Accounts that need uploaded into separate groups will need to be made into separate upload templates. All users are assigned to the same group(s) chosen per upload.
5. Once you have completed filling out the excel sheet, **save** the excel file and **close** the file. Uploads are conflicting while the file is still open. Click the **Browse** button to locate the file on your computer, and click **Open** once you have found the file and have it highlighted.

6. Click **Next** to proceed with the upload. This will reveal a “Mapping” screen.
 - a. On this screen, the ‘To’ column on the right, lists all possible information a user could have listed for their account.
 - b. The ‘From’ column on the left, lists the columns of the spreadsheet you just uploaded. If you have used an *unaltered* template (downloaded at the beginning of this process) then no mapping will be necessary and you can simply click **Next**.
 - c. If you are using your own spreadsheet or an altered template, then you may need to map some of the columns. To map the columns means to associate the columns in the uploaded sheet with the available data fields in the user profile.
 - d. To map the columns, select the radio button of the appropriate ‘From’ field and then the radio button of the appropriate ‘To’ field.
7. Click **Next**. TRAIN will now upload the users into a temporary table, where it will check the validity of the data provided and display a report of all users in the upload.

Create New User Accounts							
Check	Login Email Title	First Name Last Name Middle Name	Organization Department Section	Address 1 Address 2 City, Country, State	County Zip	Phone (day) Phone (evening) Extension	Mobile Fax Pager
Login name exists with different user name: Gregory Wasylik. Invalid State.	gwasylik gwasylik@kmionline.com	Greg Wasylik	Kmi	330 W Spring St Columbus, 22	43215		
New user.	gmoney gwasylik@kmionline.com	Greg Wasylik		**			
New user. Invalid Country.	gwasylik2 gwasylik@kmionline.com	Gregory Wasylik	Kmi	Suite 110 Test	Franklin		

8. All user accounts that check out are noted by the green **New User** text in the **Check** column.
9. User accounts that are updated are noted with a green **Updated User** text in the **Check** column.
10. All user accounts that fail will be noted by red text in the **Check** column which will describe the reason(s) for the account failing.
11. User accounts that already exist will be noted by the **User already exists** text.
12. There is also a summary list in the upper right corner of the upload data. These numbers directly reflect data check information. It is recommended that you at least consider these numbers for accuracy. If the listed user count is significantly different than you expected, it might be worthwhile to begin the upload again with a fresh upload template.
 - a. You can also create an export of the data check. To move this information to an Excel sheet, click the **Export** button.
13. Clicking **Next** will bring you to the **Assign users to groups** page. This is where you will need to assign the users to at least one group that they belong to. Click in a box next to the group name to assign it to the uploaded users. You can use the + and – symbols to expand the tree to select individual or multiple groups as well. *Remember, all groups selected will be assigned to the uploaded users; you will need to upload another user template to separate users in different groups.*

14. At this point you may either click **Next**, which will take you to the option to create and update the user accounts that passed the check, or click **Previous** to edit or update information. You can also keep using the **Previous** button to go back and cancel the new accounts and to try your upload again once you have corrected any problems with failed user accounts.
15. All new accounts will receive e-mail confirmation letting them know that an account has been created for them on TRAIN.

Batch Registration and Completion Uploads

Completion Uploads

TRAIN allows administrators to upload large CSV spreadsheets of completion data. This function is available under Administration → Users → User Completion Uploads.

In this module is a template that should be used for such uploads. That template is available for download.

The template requires course ID, first name, last name, email address and completion date.

When an administrator uploads a properly formatted template, TRAIN will look at the email addresses and names of users listed in the upload and will compare them with users listed in TRAIN. If exact matches are found, the matching user is then registered and completed for the corresponding course ID in the same row of the template as the matched user.

If no match or a partial match is found, TRAIN will present the administrator with an option to pair the uploaded user information with an existing account in TRAIN. Once all non-exact matches are paired with a TRAIN account, TRAIN will create a registration record and update the record to a completed status for the corresponding course ID (in the same row as the user) from the uploaded template.

Batch Registration

The process of Batch Registration allows a Batch Registration Administrator or Course Provider to register users into a course manually, regardless of the course format or the expired status of the course (an expired course is one that has taken place in the past). This is very helpful for affiliate administrators when it comes to reporting and tracking, as past courses can be entered into TRAIN and then users Batch Registered into the course, so that the training information is captured as part of all the TRAIN data.

In order to Batch Register users into a course or session, simply:

1. Go to the Course List – either through the **Course Search** tab, or the **Administration** tab.

- Click on the course name you wish to batch register users into, and then click the **Registration** tab.

Title	Provider	Status	Date
Introduction to Risk Management and Insurance	Government Institutes/ABS Consulting	Approved	7/26/2003
Introduction to Safety Management Self-Study Course	Government Institutes/ABS Consulting	Approved	7/26/2003
Introduction to Statistics	NH	Approved	7/27/2003
Introductory Biostatistics	Umass amherst SPH	Approved	7/27/2003
Investigating an Outbreak: Pharyngitis in Louisiana	Public Health Foundation	Approved	7/27/2003
Investigations: Accident Investigations	Emergency Film Group	Approved	7/27/2003
Investigations: HazMat Investigations	Emergency Film Group	Approved	7/25/2003
Investigations: Introduction to Investigation	Emergency Film Group	Approved	7/25/2003
Irritable Bowel Syndrome	ArizMesa Educators	Approved	7/27/2003
Is Antipsychotic Polypharmacy Effective? (Webcast)	Public Health Training Network	Approved	7/27/2003
ISO 9001:2000 - "Impact on Harmonized Quality System Requirements in the Medical Device Industry"	FDA,CDRH OHP DCM	Approved	7/27/2003
Issues in Substance Abuse Treatment for Adolescents	Mid-Atlantic Addiction Technology Transfer Center	Approved	7/27/2003
Journal Based Education Program	APAC	Approved	7/26/2003
Journal Self Study Program	SOPHE	Approved	7/27/2003
Keeping Kids with Asthma Breathing Easy & on the Go	MedWay division of SSB Inc.	Approved	7/27/2003
Key Health Problems of Age Groups and Overview of Intervention Strategies	Health Enhancement Solutions	Approved	7/27/2003
Key Informant Interviews in Health Services and Policy Research	Academy for Health Services Research and Health Policy	Approved	7/27/2003
MADD		Approved	7/11/2003
L-4/5 Disk Herniation	Wild Iris Medical Education	Approved	7/26/2003
Laboratory Testing and Infectious Diseases	APIC	Approved	7/27/2003
Labor Allergies	ArizMesa Educators	Approved	7/27/2003
Lead Toxicity in Children	Wild Iris Medical Education	Approved	7/25/2003
Leading Effective Teams	UniversityOfHealthCare	Approved	3/9/2004
Legal and Regulatory Issues in Public Health	Umass amherst SPH	Approved	7/27/2003

- If you have the appropriate administrative rights for the course in question, you will not only see the registration button, but you will now see the **Batch Register** button. For Online courses, there will be just one Batch Registration button. For Live Event courses with sessions, there will be a Batch Registration button for each session.

Course Details | Contacts | **Registration** | Reviews

You are now registered for this course. To launch the course please click here: [Launch](#)

To register other people for this course please click on the 'Batch Registration' button. You will be able to register several people at a time and create new user accounts if they don't exist. [Batch Registration](#)

[Back](#) [Find other courses like this](#)

Batch Registering for an Online Course

No upcoming session for this course is available.

Tip: To sort by any column, click the column heading. Or use default order by Distance

Tip: Alphabetical page indexing is used when sorted by Location.

Details	Location	Date	Distance
Details Map	Regional Participating Locations	7/19/2005 8:00 AM MT (expired)	0

[Batch Registration](#)

Batch Registering for an expired Live Event Course

- Click the **Batch Registration** button for the session into which you wish to register users (again, there will just be one button if there are no sessions) to proceed to the Batch Registration screen.

Adding Users

- The first step in batch registering users is to create a list of users to register. There are three ways of adding users to the Batch Registration list, and you are able to use a combination of the three methods to build the list of users to Batch Register into the course. To continue, select one of the following:

- a. **Add Existing User** – This option allows you to search for users who are eligible to register for the course and add them to the list of users to Batch Register. There are two search options available to you; **Simple** and **Advanced**.

Simple search mode allows you to find users based solely on their last name and/or their grouping assignment. Simply enter the last name of the user you are looking for, be sure the **Search users in sub-groups** is checked, and click **Search**. Or you may highlight a particular group and click **Search**. This will display a list of all users in the group, and if the **Search users in sub-groups** box is checked, the list will include all users in sub-groups of the selected group.

Advanced search mode allows you to search for users not only by last name and group assignment, but also by first name, login name, e-mail, organization, city, country, and zip code. Not only that but you may also search for users based on their Professional Role, their Work Settings, or by Demographic information.



The screenshot shows the 'Advanced' search mode interface. At the top, there are radio buttons for 'Simple' and 'Advanced', with 'Advanced' selected, and a 'Search' button. Below this are four tabs: 'Details', 'Professional Role', 'Work Settings', and 'Demographic Information'. The 'Work Settings' tab is currently selected. Underneath the tabs, there are two columns of checkboxes for selecting search criteria:

<input type="checkbox"/> Academic / Educational Institution	<input type="checkbox"/> Indian Health Service
<input type="checkbox"/> Official Public Health Agencies	<input type="checkbox"/> Tribal Health Sites
<input type="checkbox"/> Military	<input type="checkbox"/> Non-Profit Organization (except Healthcare)
<input type="checkbox"/> Other Government Agencies (except Military)	<input type="checkbox"/> Private Industry (except Healthcare)
<input type="checkbox"/> Healthcare Services	<input type="checkbox"/> Other (specify)

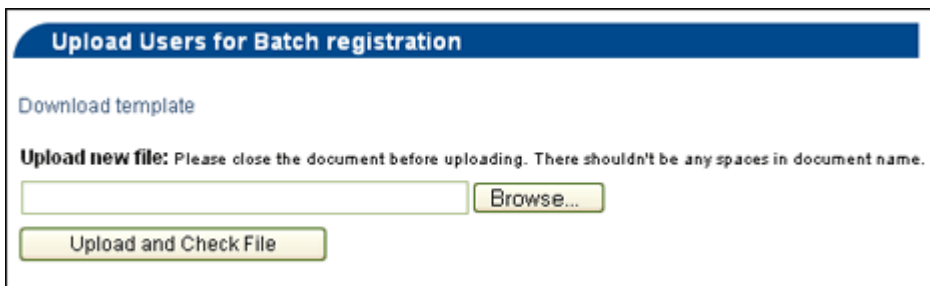
Simply select the tab you wish to work from, and enter your search criteria. For example, if you would like to register any user who has a Work Setting of **Official Public Health Agencies**, simply click the **Work Settings** tab and place a check in the **Public Health Agencies** checkbox, and click **Search**. You may use any combination of Advanced information to search for users.

Once you click **Search** you will be presented with a list of all users matching your search criteria. To add a user or users to your Batch Registration list, simply add a check to the checkbox to the left of their Login Name (or click the checkbox at the top of the checkbox column to select all) and click **Add Selected Users**. You will be redirected back to the Batch Registration page with all selected users added to your Batch Registration List.

- b. **Add New User** - This option is only available to users who also have the **User Administrator** role. The **Add New User** feature allows you to enter new user accounts individually, as well as assign them to a Group. To add a new user you only have to enter the user's Login Name, First Name, Last Name, E-mail, and Group Assignment. All other required information will be collected upon the user's first login attempt.

Once you have entered all information for the new user, click **Save** and the user account will be created and added to the list of users to Batch Register. The user will also receive a notification e-mail informing them that an account has been created for them on TRAIN along with additional login information.

- c. **Upload Users** – This option allows you to upload a large number of users through an excel spreadsheet. Starting in August 2008, you can also update and create user account while batch registering them into the course. This is similar to the user upload process described above. You will first need to download the **Upload Template** excel sheet, which is provided to you by the **Download Template** link.



The template provides you with all fields that you are able to fill out for each new user account. All fields highlighted in **red** are required, and the user upload will fail without them.

To load existing accounts using the template, you will need to enter each existing userID into the template.

Once you have completed filling out the excel sheet, click the **Browse** button to locate the file on your computer, and click **Open** once you have found the file and have it highlighted. Then click the **Next** button.

1. Click **Next** to proceed with the upload. This will reveal a "Mapping" screen.
 - a. On this screen, the 'To' column on the right, lists all possible information a user could have listed for their account.
 - b. The 'From' column on the left, lists the columns of the spreadsheet you just uploaded. If you have used an *unaltered* template (downloaded at the

beginning of this process) then no mapping will be necessary and you can simply click **Next**.

- c. If you are using your own spreadsheet or an altered template, then you may need to map some of the columns. To map the columns means to associate the columns in the uploaded sheet with the available data fields in the user profile.
 - d. To map the columns, select the radio button of the appropriate 'From' field and then the radio button of the appropriate 'To' field.
2. Click **Next**. TRAIN will now upload the users into a temporary table, where it will check the validity of the data provided and display a report of all users in the upload.

Create New User Accounts							
Check	Login Email Title	First Name Last Name Middle Name	Organization Department Section	Address 1 Address 2 City, Country, State	County Zip	Phone (day) Phone (evening) Extension	Mobile Fax Pager
Login name exists with different user name: Gregory Wasylik. Invalid State.	gwasylik gwasylik@kmionline.com	Greg Wasylik	Kmi	330 W Spring St Columbus, 22	43215		
New user.	gmoney gwasylik@kmionline.com	Greg Wasylik		**			
New user. Invalid Country.	gwasylik2 gwasylik@kmionline.com	Gregory Wasylik	Kmi	Suite 110 , Test,	Franklin		

3. All user accounts that check out are noted by the green **New User** text in the **Check** column.
4. User accounts that are updated are noted with a green **Updated User** text in the **Check** column.
5. All user accounts that fail will be noted by red text in the **Check** column which will describe the reason(s) for the account failing.
6. User accounts that already exist will be noted by the **User already exists** text.
7. There is also a summary list in the upper right corner of the upload data. These numbers directly reflect data check information. It is recommended that you at least consider these numbers for accuracy. If the listed user count is significantly different than you expected, it might be worthwhile to begin the upload again with a fresh upload template.

TRAIN will now upload the users into a temporary table, where it will check the validity of the data provided and display a report of all users in the upload.

Create New User Accounts

Check	Login Email Title	First Name Last Name Middle Name	Organization Department Section	Address 1 Address 2 City, Country, State	County Zip	Phone (day) Phone (evening) Extension	Mobile Fax Pager
New user.	gregwas gwasylik@kmionline.com	Greg2 Wasylik2					
Not all required fields provided.	gregwas2				99999		

1

Back

All user accounts that check out will be noted by the green **New User** text in the **Check** column. All user accounts that fail will be noted by red text in the **Check** column which will describe the reason(s) for the account failing. User accounts that already exist will be noted by the green **User already exists** text – these users will not have duplicate accounts created for them, but will have their accounts added to the Batch Registration list of users to register into the course. Click **Add to Batch Registration** to return to the list of users to Batch Register. Any new user will also receive a notification e-mail informing them that an account has been created for them on TRAIN along with additional login information.

2. Once you have filled out your Batch Registration list of users, you are ready to complete the final steps of Batch Registration. To complete the process you must:
 - a. Select **Credit Type** (where applicable) to apply to all selected users during course registration.
 - b. Add a score/percent to the registration (where applicable) to save on the user's transcript.
 - c. The status column allows you to select from three statuses. These statuses will be applied to the registration. If the user will still need to take the course after you have batch registered them, use the 'In Progress' status. If the user is completed or completed and verified, and will not need to take the actual course content *after* being batch registered, use either the 'Completed' or 'Verified' statuses.


Number of people to register: 1 Seats available: unlimited

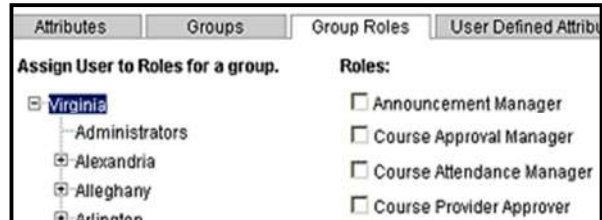
	User	Score/Percentage	<input checked="" type="checkbox"/> Verified	<input type="checkbox"/> Send Notification Email
<input type="checkbox"/>	Kelly,Dan	<input type="text"/> / <input type="text"/> %	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- d. Choose whether or not the users will receive a notification e-mail containing information regarding the registration. To select all users, simply click the **Send Notification E-mail** at the top of the Notification E-mail column. You may also select individual users to receive the e-mail, and if no users are selected then no user will receive the notification e-mail.
- e. Once the settings for each user in the Batch Registration is complete, click the **Register** button to finalize the transaction. The screen will refresh with a message confirming all registrations.
- f. If you are done with your Batch Registration, simply click **Back** to return to the Course Details page. Or click **Register More People** to continue Batch Registering users into the course.

Assigning Administrative

Roles

1. Complete the steps outlined in **Locating User Information**.
2. Click the pencil  icon next to the user to whom you wish to assign administrative roles.
3. On the resulting page, click the **Group Roles** tab.
4. Select the group or subgroup over which you would like the user to have administrative capacity.
5. Check the boxes next to the administrative roles that you wish the user to have.
6. Click **Save** to finish assigning new administrative roles to the user.



Assigning Administrative Roles

Definitions of Administrative Roles

If desired, TRAIN administrative roles may be assigned to individuals or groups to share site management responsibilities or increase access to TRAIN data. Applying administrative roles to others is analogous to providing access to a locked file cabinet containing confidential or proprietary information.

Roles should be applied carefully!

Note: If an admin has access to user records in one interface, they have access to those records in every interface which displays that type of record. Visibility is controlled exclusively through user group assignment and roles.

Role Name	Description
Accreditation Manager	Users with this role assigned can access, edit and add new and existing accreditations under the Admin → Courses → Accreditations menu
Announcement Manager	Creates, modifies Announcements; assigns them to groups. This role allows users to add announcements either on the Home page or from the Admin → Announcements menu
Assessment Manager	This role allows users to add and edit assessment question categories; add and edit questions in those categories; and assign assessments and assessment questions to courses. Users with this role can add assessments to courses in the Course Search or Admin → Courses → Course List menu. To add assessment question categories and questions, users will have access to the Admin → Courses → Assessments menu
Batch Registration Manager	Allows administrators to upload multiple users to a course, even if that course is expired. This is done from the course details page. It also allows admins to upload users in the Admin → Users → Upload Users interface
Conference Presenter	This role allows users to be listed within a conference session as the presenter for that session. Users who are approved for this role will appear in a dropdown within the conference session interface. Users who have this role approved will also be able to manage their conference presenter profile, bio, and presenter materials. This role must be applied for by the user under “My Account.”
Conference Presenter Approver	Approves users who request the Conference Presenter role. This is available in the Admin → Approvals interface
Course Approval Manager*	Adds, modifies courses. Approves or declines new courses. This is available in the Admin → Approvals interface or the Admin → Course List interface by opening the course wizard.
Course Attendance Manager*	Verifies Course Attendance. Sets the Completed Verified status for users registered for the course. Can access the Admin → Users → Verifications interface.
Course Certificate Manager	Creates, modifies Certificates; assigns them to groups for use in courses. This function is available in the Admin → Courses → Certificates interface
Course Provider Approver	Approves or declines user requests to become a course provider, using the Admin → Approvals interface.
Course Registration Approval Manager*	Approves or declines course registrations for courses requiring approval, using the Admin → Approvals interface.

Course Reviews Manager	Activates/deactivates course reviews in the course details page.
Course Session Manager	Adds, modifies course sessions. This allows admins to add session to courses that they did not necessarily create. If the course is available for the same group that this role is assigned, admins will be able to open the sessions interface for the course and add/edit available sessions.
Discussion Manager	Creates, modifies Discussion Topics; assigns them to groups. To create a discussion topic, admins have available the Admin → Discussions interface and also the Discussion Boards tab.
Email Manager	Can access the email utility and send emails to users in the assigned group. This is available in the Admin → Utilities → Email Utility interface. Admins with this role will be able to email any users also assigned to the group where the role is assigned.
Evaluation Manager	This role allows users to add and edit evaluations question categories; add and edit questions in those categories; and assign evaluations and evaluation questions to courses. Users with this role can add evaluations to courses in the Course Search or Admin → Courses → Course List menu. To add evaluations question categories and questions, users will have access to the Admin → Courses → Evaluations menu
Library Administrator	Modifies Library item descriptions; assigns Library items to groups; approves Library items submitted by users. Management for the Library is available in the Admin → Library interface as well as under the Library tab.
Link Manager	This role allows users access to add and edit items listed under the Admin → Spotlight interface. Links posted here appear on the TRAIN home page for the appropriate groups.
Live Event Manager	Receives monthly notifications of new events via email.
Location Manager	This role allows access to the Admin → Courses → Session Locations interface. Users with this role will be able to add session location that can later be selected when creating session schedules. Location manager cannot necessarily create session schedules.
Non-Train Event Manager	Approves, manages Non-Train events in the Admin → Approvals and Admin --> Non-Train Events interfaces.
Non-Train Event Poster	Adds, modifies non-train events in the Admin → Non-Train Events interface
Permission Manager*	This role allows administrators to access the user list and assign administrative role to users. This is available in the Admin → Users → User List interface.
Portfolio Manager*	This role allows administrators to set course visibility independent of what the course provider

	might have set. This is accessible in the Admin → Courses → Course Availability interface
Report Manager	Accesses reports of aggregate data about site usage, and Excel exports of raw site usage data. Can also access the Ad-Hoc report interface. Both of these options are available under the Admin → Reports menu
Resources Manager	Modifies Document descriptions; assigns Documents to groups; approves documents submitted by users. This role allows access to the Admin → Resources interface and some admin functions under the Resources tab
Survey Manager	Survey managers can create new and manage existing surveys under the Admin → Surveys interface.
Survey Reviewer	Allows user to perform reviews of surveys after a user has submitted a public review survey for review.
Training Plan Manager	This role allows users to create and assign Training Plans to users. This is managed in the Admin → Courses → Training Plan interface
User Account Manager*	Creates, modifies User Accounts; assigns users to groups via the Admin → Users → User List interface.

* Users with this role when assigned to the state level will appear on the **Help** --> **Contacts** page.

Affiliate administrators can assign and remove these roles, just as the other roles. Rather than use this automatically populated list of contacts, affiliates can contact KMi to use a static help page instead.

Roles assigned by request to PHF/KMi only:

1. **Duplicate Account Manager** – This role allows the user to manage accounts identified as potential duplicates. It can be assigned at levels below the affiliate group level but reflects an affiliate’s entire set of potential duplicate accounts regardless.
2. **YouTrack Access** – Allows admins to submit support requests to PHF and KMi

Duplicate Account Manager

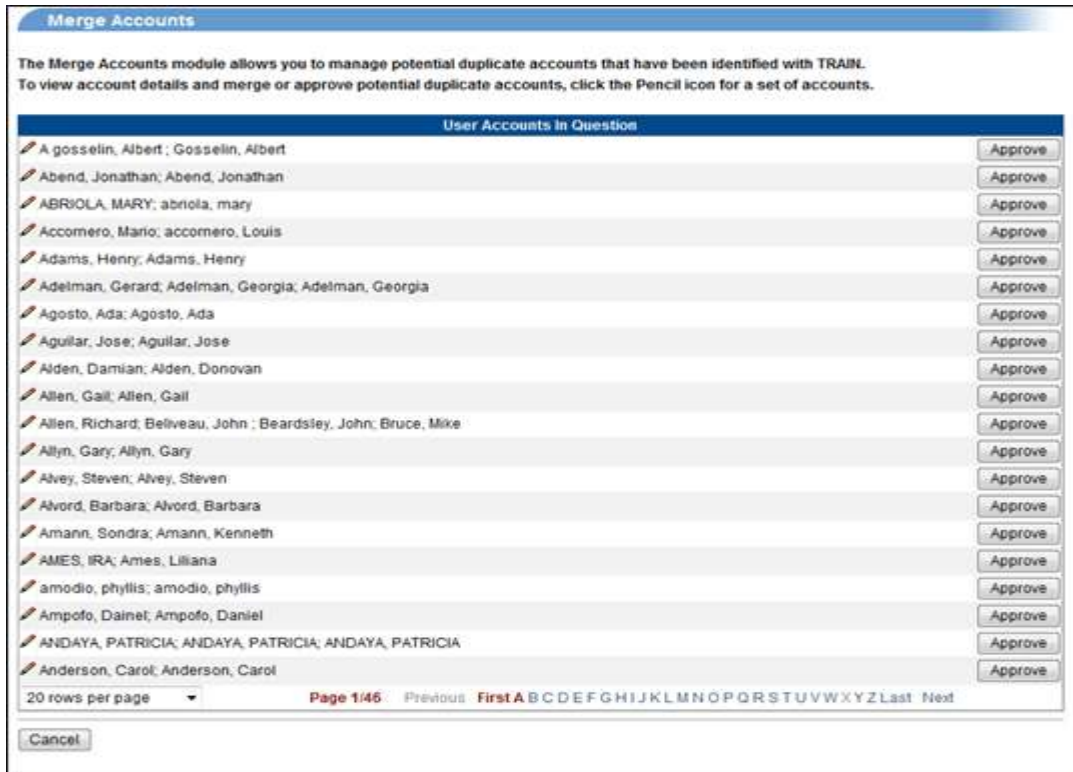
Finding Duplicate Accounts



The Duplicate Account Manager role allows the administrator to merge two or more accounts into one Master Account. To access this interface, administrators can use either the link on the homepage which appears under the action items section of the dashboard or navigate direct to: **Administration / Users / Merge Accounts**.

NOTE: TRAIN identifies potential duplicates automatically via nightly scripts that run through all user accounts within TRAIN. If you find two accounts that have not been identified by TRAIN you are not able to merge them manually. You must edit one account to more closely match the other. Once this is done, TRAIN should identify the two accounts as potential duplicates during the next nightly update.

The fields TRAIN uses to identify potential duplicate accounts are: First Name, Last Name, E-mail, and Organization.

The initial account merge interface appears as a list populated with user accounts recognized by TRAIN to be potential duplicates. Each potential set of duplicate accounts are listed as Last Name, First Name on the same line. A semicolon (;) separates the two accounts and a comma (,) separates the stored first and last names of the user account (e.g., Shannon, Paul; Shannon, Paul E – would indicate that I potentially have two accounts, one of which uses my middle initial, one of which does not).



1. The list of accounts only sorts alphabetically. Once you have located the accounts you would like to merge, you can either click the **Approve** button, or the **Edit** pencil  icon.
 - a. Clicking the **Approve** button, without any editing, will allow all accounts listed in the row to continue existing as they are and will remove the accounts from the merge list.
2. Clicking the **Edit** pencil  icon will reveal some additional options. There are four options for each pair of accounts: **Master Account**, **Merge**, **Deactivate** and **Approve**.
3. To merge two or more accounts: one and only one of the accounts must be selected as the **Master Account**. All other accounts which are to be merged into the master account need to be set as **Merge**.
 - a. The alternative to merging two duplicate accounts is to deactivate all but one of the accounts. To do this, select one account to **Approve** and select the others to **Deactivate**. This will deactivate all but the one approved account.
4. It is also possible, for users who may have more than two accounts which require action, to choose several merge options. The first thing is to select one account to be a **Master Account** (without a master account, no accounts can be merged). Then, select the accounts to **Merge** with that account. If any of the duplicate accounts are to be kept as they are (not merged or deactivated, but simply left alone), set them as **Approved**. And lastly, if any of the accounts need to be removed altogether, select **Deactivate**.

General merge account button rules:

- **Master Account** – select this option for the account (id, username, group settings, etc) that you want to keep. If this option is selected, there must be at least one other account set to Merge with the master account. That is to say, you cannot have one master account and deactivate all other accounts as this will return an error.
 - **Merge** – This option only works in conjunction with the Master Account selection. The user history and course registrations of the merging account will be moved to the master account. The merged account then becomes inactive.
 - **Deactivate** - Select this option for accounts which do not need to be merged with any other account, but do need to be made inaccessible. Deactivated accounts are accessible in the Administration / Users / Archive interface.
 - **Approve** - This option will approve the duplicate accounts to continue existing as they are with no changes. Approved accounts will also no longer appear on the list of accounts to merge.
5. Once an action is selected for each account, click the **Merge Accounts** button to continue with your selections.
- a. If no action is required you can click **Cancel** to return to the merge list. The accounts will remain in the list until some kind of action is taken.

The screenshot displays the 'Merge Account: Account Details' window. It features two side-by-side panels, each representing a user account. Each panel has a header with radio buttons for 'MasterAccount', 'Merge', 'Deactivate', and 'Approve'. The left panel shows 'User: Adams, Henry (ID = 62708)' with a login name of 'HAdams' and 0 course registrations. The right panel shows 'User: Adams, Henry (ID = 83006)' with a login name of 'HCAAdams' and 1 course registration. Below the panels is a checkbox labeled 'Notify users about their account merge' which is checked. At the bottom are three buttons: 'Cancel', 'Approve All Accounts', and 'Merge Accounts'.

Field	User: Adams, Henry (ID = 62708)	User: Adams, Henry (ID = 83006)
MasterAccount	<input type="radio"/>	<input type="radio"/>
Merge	<input type="radio"/>	<input type="radio"/>
Deactivate	<input type="radio"/>	<input type="radio"/>
Approve	<input type="radio"/>	<input type="radio"/>
User	Adams, Henry (ID = 62708)	Adams, Henry (ID = 83006)
Login Name	HAdams	HCAAdams
Email	henry.adams@po.state.ct.us	henry.adams@po.state.ct.us
State Groups	Connecticut	Connecticut
CourseRegistrations	0 View Transcript	1 View Transcript
CourseProvider	No	No
Posted Courses	0	0
AdminRoles	0	0
Non-course Items	0	0

Note: An e-mail is automatically sent to the user(s) informing them of the update. If you do not wish this e-mail to go out, uncheck the Notify Users checkbox (see image above) and no users will be notified.

Note: It is sometimes very difficult to undo activities involving merging. Please use caution and double check your users before merging accounts.

Approvals

TRAIN will automatically notify administrators of course providers that are awaiting approval to be able to list courses on the system.

Course Provider Approvals

1. Click on the **Approval Items** link in your action items section of the dashboard. You may also reach Courses Providers with pending approval by:
 - a. Click the **Administration** tab located in the **Navigation Tab** bar, followed by **Approvals** from the menu that appears on the left hand side of the page.
 - b. Click the **Administration** tab located in the **Navigation Tab** bar, followed by **Course Providers** from the menu that appears on the left hand side of the page. Select **Ready for Approval** to filter the resulting Course Provider list.
2. Reset the provider's status by selecting from the drop-down menu.
3. You then have the option of sending a notification e-mail to the user. If you do not wish to send an e-mail regarding the update, simply uncheck the box next to **Send E-mail upon Submit**. Be sure to review the e-mail and add any necessary comments before clicking **Submit**. Click **Submit** to complete the status change.
4. You can also send the provider a personalized e-mail by clicking on the envelope icon located next to the provider's name.

Assuring Quality Course Providers

As an administrator, you are responsible for taking reasonable steps to assure the quality of all course providers you approve. To assist you, TRAIN asks providers to answer the following standard questions during their online registration:

1. What public health-related topics (e.g., subject areas, competencies) will be covered in your courses?
2. What target audiences (e.g., nurses, administrators, epidemiologists) do the majority of your courses serve?
3. Is your organization accredited to provide training related to these topics or target audiences? Yes No

If yes, please provide the name of the accrediting body.
4. Do most of your public health-related courses offer continuing education credits? Yes No

If yes, please specify the credit types (e.g., CHES, CNE, CEU, CME).
5. Will there be fees charged for any of your courses? Yes No

Questions 1 and 2: Providers' brief descriptions should indicate that the types of courses they intend to list on TRAIN will be related to the subject areas and the target audiences in the TRAIN search fields.



If providers include some subjects or target audiences that are inappropriate or questionable, contact the provider at the time of approval to clarify the types of courses that would and would not be appropriate to list on TRAIN. Clarifying expectations up front saves time and avoids the frustration caused when the Administrator disapproves courses that an approved provider has taken time to enter.

Questions 3 and 4: To automatically meet the minimum standard for approval on the national TRAIN site, the course provider must answer "yes" to at least one of the two questions. Both questions are meant to be proxies for course quality.

If a course provider answers “no” to both questions, you must take additional steps to verify that a course provider is reputable before granting permission to list courses on TRAIN. Verifying the reputation of course providers and the overall quality of their materials is likely to be subjective. You may wish to:

- Ask for references from public health professionals who have taken training offered by the course provider.
- Talk with other local, state, or national organizations who may have worked with, or know the reputation of the course provider.
- Review the provider’s web site to learn more about the organization’s mission, expertise, training programs, and staff.
- Ask the provider to describe their course quality assurance process (and approve only providers that use external subject matter experts as reviewers).
- Review sample courses, curricula, or faculty credentials (this is the most labor-intensive and is not routinely done for the national TRAIN.org site).

After reviewing all requested information, you must approve or disapprove the provider. If desired, you may approve the provider’s registration with restrictions. For example, you could invite the provider to list only their courses with continuing education credits, or you could decide that TRAIN affiliate staff must review and approve courses without continuing education credits before approving a listing.



If you apply any restrictions to a provider, you must communicate them clearly at the time of approval, be able to keep track of them, and be willing to enforce them. There is no mechanism to apply or track provider-specific restrictions in TRAIN.



Remember, if you are not comfortable with a course provider, you are not obligated to approve the registration. TRAIN policies give you the right to refuse or revoke approval for any reason, at any time. Additionally, after you approve a provider, you still have the chance to approve or disapprove every course the provider submits to TRAIN.

For the national TRAIN.org site, PHF generally has chosen to err on the side of approving a provider. We value making course information available through TRAIN, rather than restricting it. If desired, affiliates may choose a more restrictive approach to the providers they approve to list courses on TRAIN.

TRAIN affiliates should review registrations from only those course providers that primarily serve their jurisdictions, typically a single state or a subset of the state as assigned by the TRAIN site administrator.

TRAIN affiliates should not solicit or approve registrations from course providers that primarily serve the following:

- National or regional (multi-state) audiences (e.g., federal agencies, national associations, HRSA- or CDC-funded training centers serving two or more states)
 - ⇒ Refer such providers to the national TRAIN.org site
- State or local audiences in non-TRAIN affiliate states
 - ⇒ Disapprove them or refer questions to the national TRAIN.org staff

For additional guidance on determining the appropriate registration site for a provider, refer to the following sections in the *Course Provider Reference Guide: Becoming a Registered Course Provider* and *Course Listing Requirements*.

Approving Courses from Course Providers

1. Click on the **Approval Items** link in the action items section of your dashboard. You may also click the **Administration** tab located in the **Navigation Tab** bar, followed by **Approvals** from the menu that appears on the left hand side of the page.
2. Click on the title of the course to which you wish to make status alterations.

Course Status:

- Ready For Approval
- Approved
- Declined
- More Information Requested
- Incomplete

Course Approval Status

Reset the course status to the desired approval level. The choices available to you are:

- **Ready For Approval** – When a Course Provider submits their course for approval it is considered **Ready For Approval**. All courses entering your approval queue will be set to this status.
- **Approved** - Select **Approved** if you approve the course for release on TRAIN.
- **Declined** - Select **Declined** if you need to reject the course. A Declined course will not be available for public viewing or registration.
- **More Information Requested** – Select **More Information Requested** if you need more information added to the course before you feel comfortable approving the submission. Be sure to add your comments in the **Approver's Comments** section, as well as in the E-mail that will be sent to the user (see below for more information).

Approver's Comments - The Approver's Comments box provides you with a method of dialoging with a Course Provider. If you have any feedback for the Course Provider, or if you need more information, enter your comments in this text area. The Course Provider is also able to reply to your comments, so be sure to check the Approvers Comments box

for any updates from the Course Provider upon submission or re-submission for approval.

3. Once you have made your selection, the screen will refresh to display the notification e-mail that will automatically be sent to the Course Provider informing them of their course's status change. Be sure to review the e-mail and add any relevant comments, especially if you are requesting additional information. The e-mail will be sent as soon as you click **Save** and update the course status.
4. Click **Save** or **Save and Back** to finish altering the course status. The course status is updated immediately, so if you have **Approved** a course it will be available to the public as soon as you click **Save** or **Save and Back**.

Assuring Quality Courses from Providers

Individual TRAIN affiliates are responsible for assuring that courses meet the minimum course listing requirements and are properly listed according to the course field descriptions, subject area definitions, and other guidance in the *Course Provider Reference Guide*.

Requirement #1: Courses must be designed for the continuing education and training of professionals who protect the public's health and be consistent with the target audiences in the TRAIN course search fields. Consumer-oriented health education classes and materials are not permitted.

A full list of professionals to whom TRAIN is targeted can be found in the *Course Provider Reference Guide*.

Examples of inappropriate target audiences: Manicurists, brain surgeons, stock brokers, and other professionals unrelated to public health, unless the topic specifically relates to public health roles (Acceptable: "What Manicurists Need to Know about Viral Hepatitis," "HIV-related Complications for Brain Surgery").

Consumers are NEVER an appropriate target audience. TRAIN is a professional education resource, not for personal health education. Administrators should never approve consumer health courses, such as courses that teach parents about child nutrition, teens about pregnancy prevention, or seniors about Medicare rules.

Requirement #2: Courses must be designed to build knowledge, skills, or competencies in one or more of the subject areas listed in the TRAIN course search fields.

TRAIN administrators should review the complete course description before approving a course. Pay particular attention to any course with **Other** selected as a subject area or target audience. Often, these courses are inappropriate for the site. Even if standard TRAIN subject areas and target audiences are selected, sometimes the course title or description will reveal that the course is really focused on an inappropriate subject or target audience.

Examples of inappropriate topics: Tattoo removal, auto repair, search and rescue, and other topics unrelated to public health unless the course is:

- a. Specifically geared to a public health audience (Acceptable: “What Public Health Leaders Need to Know about Tattooing Techniques”).
- b. Related to the Core Competencies for Public Health Professionals or similar sets of general or discipline-specific competencies for public health professionals.
- c. Reasonably likely to be of interest to public health audiences – such as an introductory course that is a foundation for proper regulatory or other assurance efforts or for understanding the roles of partners. (Acceptable: “Introduction to Search & Rescue Operations”).



Courses often require editing to be consistent with TRAIN guidelines. Commonly misused categories – and ones to watch – are the **General Public Health** and **Workforce Development** subject areas. See *Definitions of Subject Areas* in the *Course Provider Reference Guide*.

Requirement #3: Course materials must be designed for instructional (not reference) use by users or trainers. Courses must be delivered in formats consistent with the formats in the TRAIN course search fields.

Books, brochures, articles, palm cards, and other reference materials are not permitted, unless continuing education credits are associated or the materials are designed as a self-study program.

TRAIN administrators should approve listings for only those programs or materials that reasonably can be considered to be a continuing education opportunity for professionals, or a train-the-trainer program. Review the course format and pay extra attention if **Other** or **Text-based** formats are selected. Often, these are inappropriate formats.

Examples of inappropriate formats: Books, brochures, palm cards, computer-based references, journal articles, informational web sites, and other text formats are inappropriate, unless continuing education credits are associated with reading the item or the material is specifically designed as a self-study course.

Also inappropriate for listing on TRAIN:

- Degree programs. Administrators should review carefully any course that selects **Academic Credit** as a credit type. Individual courses for academic credit may be listed so long as they are readily available to those not enrolled in the degree program (i.e., professionals may audit the course without taking entrance exams or enrolling in the full degree program).
- Networking conferences, meetings, and other events whose primary purpose is not continuing education for professionals.



To save time, contact providers to explain your edits so they can list courses properly the next time.




Course Approval Options

- If desired, TRAIN affiliates may impose additional standards for course relevance or quality before approving course information to be displayed on the affiliate site.
- To verify the quality of a course, you may wish to have the submitter provide the course material to you or a review body in your jurisdiction for approval. This is a labor-intensive process and is not used for the national TRAIN.org site.

Changing the Course Provider for an Approved Course

Course Approvers now have the ability to adjust the assigned course provider for an *approved* course. Course Approvers will have this ability for any course they would otherwise be able to approve.

To change the assigned course provider for an approved course:

1. Login as a Course Approval administrator.
2. Locate the course for which you wish to change the course provider.
 - a. You can locate the desired course either by 'Course Search' or in the 'Administration → Courses → Course List' interface.
3. Once you have located the correct course, click the **Pencil** icon () in row with that course.
 - a. This will reveal the 'Course Edit Wizard' interface.
4. In this interface, in the general information portion at the top of the page, the system will list the current course provider and next to the name will be an additional **Pencil** icon (). To change the course provider, click the **Pencil** icon ().
 - a. This will reveal the standard 'Search' interface, both simple and advanced.
5. Search for the new course provider by last name.
 - a. The search results will only return users who have the course provider role assigned to the account.
6. Select the checkbox next to the new course provider and click the **Assign** button.

- a. This will return you to the 'Course Edit Wizard' interface where the new course provider will be listed in place of the previous provider.
7. Click **Save** to exit the 'Course Edit Wizard' interface.
 - a. The newly assigned course provider will now have full course provider rights to the course.

Note: If you do change the assigned course provider for a given course, it is important to note that any assessments or evaluations will still remain attached to the course and will still function as normal. However, any custom certificate assignments will not follow the course. In this case, the course provider will have to create and re-assign the certificate.

Approving Registrations to Courses

1. Click on the **Approval Items** link in the action items section of the dashboard. You may also click the **Administration** tab located in the **Navigation Tab** bar, followed by **Approvals** from the menu that appears on the left hand side of the page.
2. Click on the item name for which the user is seeking approval.
3. On the resulting page, select either **Approve** or **Decline** next to the user's name. The user will be automatically informed of the change in their registration status for that item by e-mail.
4. Click **Back** to return to the pending approval list.

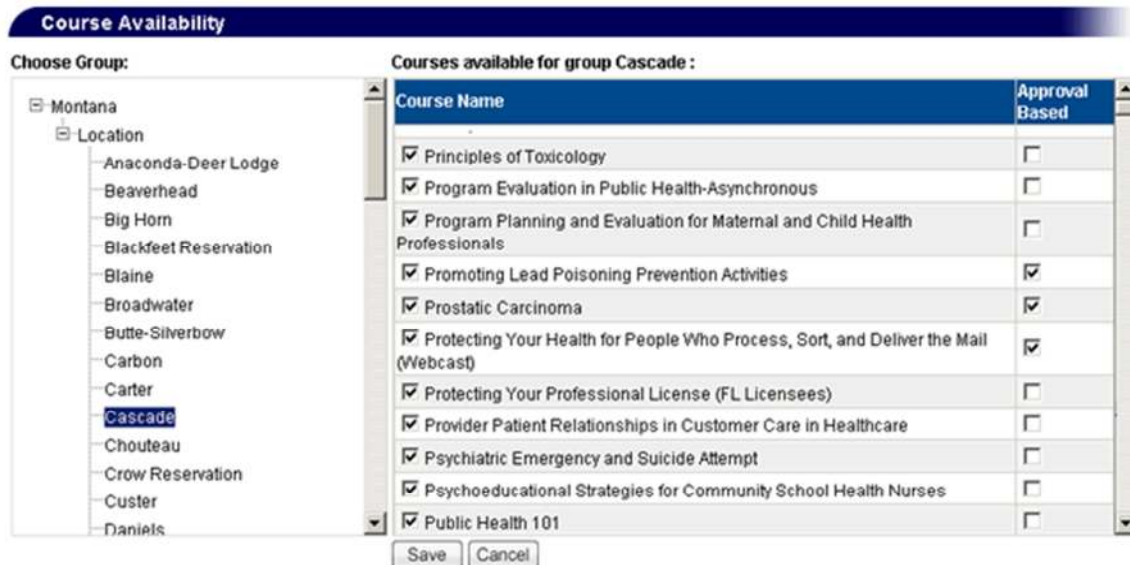
Pending		
User Name	Registered	
Arnold, Mary	7/24/2003	Approve Decline

User Registration Approval

Note: You may reverse the **Approve** or **Decline** decision at any time.

Note: Course Providers are able to set their courses to approve all Registration Requests. If a Course Provider sets their course up for Course Provider Approval users who requests registration for the course will not show up in the Administrator's approval queue.

Managing Course Availability



Course Availability

The graphic above illustrates the Course Availability interface. Administrators with the **Portfolio Manager** role have the ability to make courses available or unavailable to select groups, and to require that users obtain approval before being able to register for certain courses. Administrators may set portfolios for their groups by simply checking or unchecking boxes next to the course name. Courses may also easily be made approval-based which automatically requires the input of a Course Registration Approval Manager.

Note: Course Providers are able to set their courses to approve all Registration Requests. If a Course Provider sets their course up for Course Provider Approval users who requests registration for the course will not show up in the Administrator's approval queue.

By default, all courses are available to all users. Also by default, all courses available to a state are available to all sub-groups under that state. With these two ideas in mind, we recommend that custom portfolios be made "from the top down." By this, we mean a process of setting all the common courses at the state level first followed by adjustments at the sub-group level. To illustrate this process we have created two scenarios.

Scenario 1: You as a Montana State administrator wish to make the course *Public Health 101* available only to people in the Cascade County group. Here are the steps you would follow:

1. Click on the **Administration** tab, located in the **Navigation Tab** bar.

2. On the resulting page, select **Courses**, followed by **Course Availability** from the menu that appears on the left side of the page.
3. Make sure that the state name is highlighted and that the text over the course list reads **Courses for the group Montana**.
4. Expand the group tree by clicking the plus sign (+).
5. Scroll through the course list to find *Public Health 101* and uncheck the box next to the course listing.
6. Click **Save**.
7. Click on Cascade County (Make sure the text reads **Courses for the group Cascade** before you proceed).
8. Scroll to *Public Health 101* and check the box next to the course listing.
9. Click **Save** to finish editing the course availability.

The course is now visible to only those people registered in Cascade County while the rest of the portfolio is available statewide.

Scenario 2: You wish to make a core portfolio of courses available to everyone in your state but you want to restrict access to some courses based on their relevance to different professional groups. Your grouping structure has both location and professional sub-groups. Here are the steps you would follow:

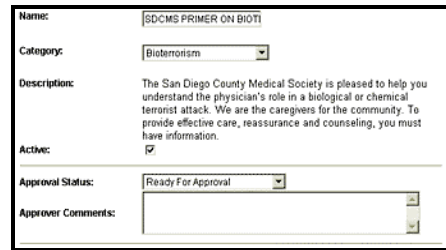
1. Click on the **Administration** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select **Courses**, followed by **Course Availability** from the menu that appears on the left side of the page.
3. Make sure that the state name is highlighted and that the text over the course list reads **Courses for the group <State name here>**.
4. Expand the group tree by clicking the plus sign (+).
5. Scroll through the course list and uncheck all courses that you do not wish to be included in the core portfolio.
6. Click **Save** to finish editing the core portfolio.

At this point the core portfolio is complete. The next steps apply to assigning courses to sub-groups.

- a. Click on the sub-group to which you wish to assign courses. (Make sure the text reads **Courses for the group <Sub-group name here>** before you proceed).
- b. Check the boxes next to the course(s) you wish to make available to that sub-group.
- c. Click **Save** to finish assigning courses to subgroups.
- d. Repeat steps a. – c. as needed for other sub-groups.

Approving Resources

1. Click on the **Approval Items** in the action items section of your dashboard. You may also click the **Administration** tab located in the **Navigation Tab** bar, followed by **Approvals** from the menu that appears on the left hand side of the page.
2. You will see a listing of items requiring approval.
3. Click on the title of the item that you wish to review.
4. On the resulting page, review the information and reset the approval status to the desired level.
5. Enter any comments in the **Approver Comments** text area. This is very helpful when changing an item's status to **More Information Requested**, as you can directly inform the user what information they need to provide in order to have their resource approved.
6. Click **Save** to finish resetting the approval status.

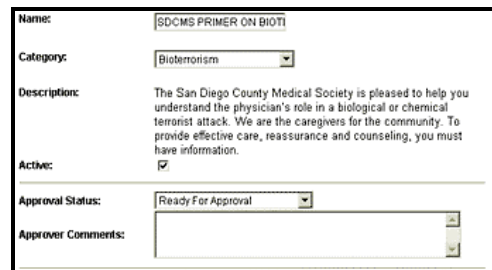


The screenshot shows a web form for resource approval. The fields are: Name: SDCMS PRIMER ON BIOTI; Category: Bioterrorism; Description: The San Diego County Medical Society is pleased to help you understand the physician's role in a biological or chemical terrorist attack. We are the caregivers for the community. To provide effective care, reassurance and counseling, you must have information.; Active: checked; Approval Status: Ready For Approval; Approver Comments: (empty text area).

Resource Approval

Approving Library Items

1. Click on the **Approval Items** in the action items section of your dashboard. You may also click the **Administration** tab located in the **Navigation Tab** bar, followed by **Approvals** from the menu that appears on the left hand side of the page.
2. You will see a listing of items requiring approval.
3. Click on the title of the item that you wish to review.
4. On the resulting page, review the information and reset the approval status to the desired level.
5. Enter any comments in the **Approver Comments** text area. This is very helpful when changing an item's status to **More Information Requested**, as you can directly inform the user what information they need to provide in order to have their Library item approved.
6. Click **Save** to finish resetting the approval status.



The screenshot shows a web form for library item approval. The fields are: Name: SDCMS PRIMER ON BIOTI; Category: Bioterrorism; Description: The San Diego County Medical Society is pleased to help you understand the physician's role in a biological or chemical terrorist attack. We are the caregivers for the community. To provide effective care, reassurance and counseling, you must have information.; Active: checked; Approval Status: Ready For Approval; Approver Comments: (empty text area).

Library Item Approval

Reports

You will need to be logged on to your TRAIN site to use the features described in this section.

The TRAIN Report Console allows administrators with the **Report Manager** role to create reports using the following criteria:

- Participation by Subject Area
- Participation by Course Name
- Participation by Format
- Participation by Competency
- Course Availability by Topic
- Course Availability by Competency

The Report Console also allows administrators to export data on many of TRAIN's features.

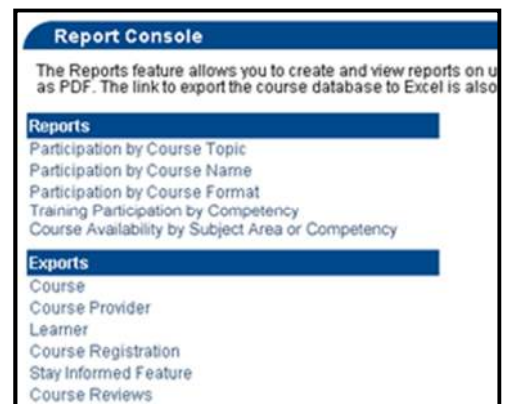
Administrators may download "unfiltered" data from the site in Microsoft Excel format for customization purposes. The following exports are currently available:

- Course Export – National
- Course Export - My State
- Course Providers
- Learners
- Course Registration
- Stay Informed Feature
- Course Reviews
- Sessions – National
- Sessions - State
- Session Instructors
- Session Schedules
- Locations
- Course-Group Assignments
- User-Group Assignments
- User-Role Assignments
- Non-Train Course Registrations

Note: when selecting a date in the reporting interface, the report will run from the 0:00 hour of the selected date.

Accessing Reports and Exports

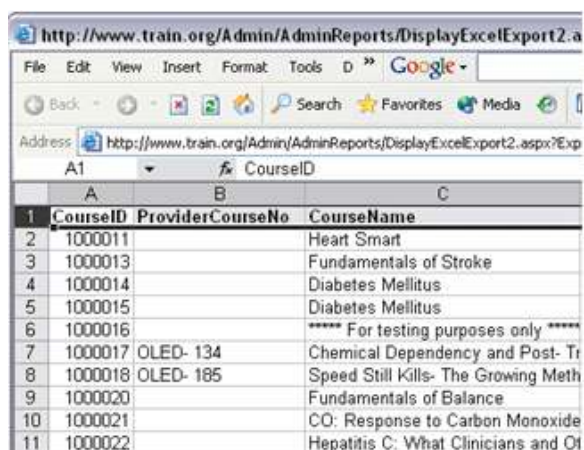
1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. Click **Reports** from the menu that appears on the left hand side of the page.
3. On the resulting **Report Console**, you may select either to create a report or export data.



Report Selection Console

Data Exports

1. From the **Report Console**, select the desired report category from the **Exports** list.
2. A new browser window will open, along with the desired data. Some browsers may provide a standard download dialog box.
3. Select **Save As** to store the file in Microsoft Excel.



The screenshot shows a web browser window with the address bar displaying <http://www.train.org/Admin/AdminReports/DisplayExcelExport2.aspx?Exp>. The browser's address bar also shows "CourseID". Below the browser window, an Excel spreadsheet is displayed with the following data:

	A	B	C
1	CourseID	ProviderCourseNo	CourseName
2	1000011		Heart Smart
3	1000013		Fundamentals of Stroke
4	1000014		Diabetes Mellitus
5	1000015		Diabetes Mellitus
6	1000016		***** For testing purposes only *****
7	1000017	OLED- 134	Chemical Dependency and Post- Tr
8	1000018	OLED- 185	Speed Still Kills- The Growing Meth
9	1000020		Fundamentals of Balance
10	1000021		CO: Response to Carbon Monoxide
11	1000022		Hepatitis C: What Clinicians and Of

Excel Export

Creating Reports

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Reports** from the menu that appears on the left hand side of the page.
3. Select the desired report category from the **Reports** list.
4. On the resulting report criteria page select the desired variables and groups. You may select multiple variables by holding down the Control key while making your selection.
5. Click **Create Report** to create your desired report.



The screenshot shows a web form titled "Course Availability by Course Topic" with a "Create Report" button. The form includes the following fields and options:

- Tip:** If no date limits are selected the report will cover all available data.
- Start Date:** 7/1/2004 (format MM/DD/YYYY)
- End Date:** 7/1/2004 (format MM/DD/YYYY)
- Course Topic:** A dropdown menu with options: All, Access to Care (includes health insurance), Animal Health, Chronic Diseases.
- Choose Groups:** A list of checkboxes for various groups: All, Affiliate Administrator, Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut.

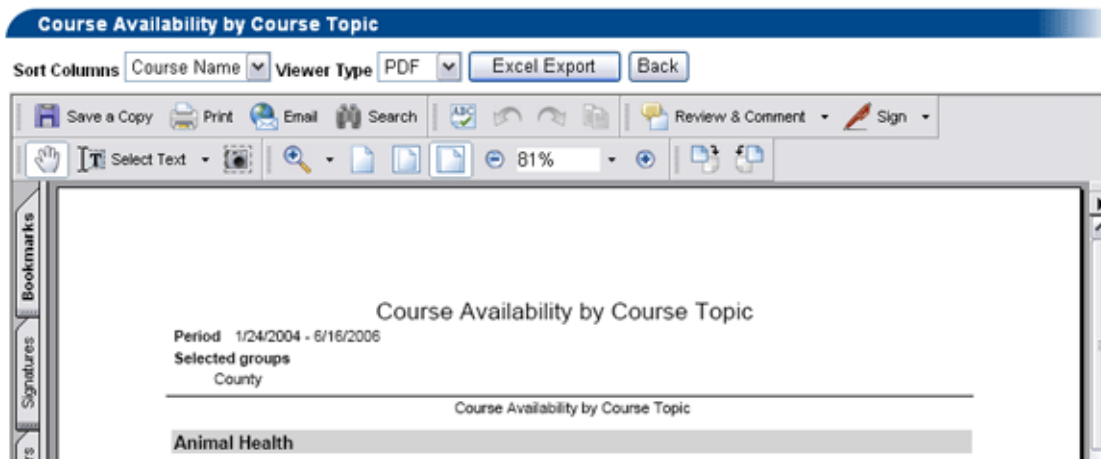
Search Criteria Page

Viewing and Working with Reports

The report viewer offers three file formats for viewing and manipulating data. Select from **Viewer Type** or **Excel Export** to view one of the following:

- **PDF:** This format is useful for printing, distributing and archiving reports.
- **HTML:** This format displays the report as a web page. HTML is quicker than the PDF format, as it does not require launching a separate application.
- **Excel:** This format is useful for further manipulation on your computer. Unlike the Export feature that downloads "raw data," this option delivers data that is filtered by your desired criteria.

We recommend that you experiment with each of these formats to find the best application for your specific needs.



Report Viewer

Course Roster Export

The Course Roster Export gives you a raw data dump of User Information for all registrants of the selected courses. In order to generate a Course Roster Export:

1. Click on the **Administration** tab located in the **Navigation Tab** bar.
2. On the resulting page, select **Reports** from the menu that appears on the left hand side of the page, and then click **Course Roster**.
3. A new screen will open and direct you through the export process. The first step is to select if you would like to pull registration information from a single course, or from a group of courses.
 - a. **Single Course:** If you select Single Course, you will then be prompted to select the appropriate Course Name from a drop-down list.
 - b. **Groups of Courses:** If you select Groups of Courses you will then be asked if you would like to run the report on all courses, or if you would like to select a number of distinct courses. If you select **All**, simply click the **Create Report** button to proceed. If you choose **Select Courses** the screen will refresh and present you with a list, broken down into pages, of all courses available.

To add a course to the **Selected Courses** list, simply page through the courses until you find a course you would like to add, and click the **Add** button to the left of the course name. You may continue this process to add as many courses as you need to for your report.

Once you have all of the courses you need in the **Selected Courses** list (see image below) simply click the **Create Report** button to generate your data export.

The screenshot shows a web interface for selecting courses. At the top, there are radio buttons for 'Single course' and 'Group of courses'. Below that, there are radio buttons for 'All Courses' and 'Select Courses'. The 'Selected Courses' section contains a table with one row: 'Keeping the 'Genome' in the Bottle: Reinforcing Biosafety Level 3 Procedures' by CDC, available as a 'Webcast (on demand)'. Below this is a section titled 'Please select courses out of the following list' which contains a table of 'Available Courses' with columns for 'Available Courses', 'Provider', and 'Course Format'. The available courses include: 'Keeping the 'Genome' in the Bottle: Reinforcing Biosafety Level 3 Procedures' (CDC, Webcast), 'Introduction to Social Marketing' (University of South Florida College of Public Health, Web-based Training - Self-study), 'Management of Public Health Programs' (University of South Florida College of Public Health, Web-based Training - Self-study), 'Overview of United States & International Emergency/Disaster Management' (University of South Florida College of Public Health, Web-based Training - Self-study), '- test live event by TZ' (kmi, On-Site - Conference), '10 Steps to Sustainability' (Center for Civic Partnerships, Public Health Institute, Text-based (print and electronic based)), '1002422Smallpox Vaccinator Train-the-Trainer' (Connecticut Department of Public Health, On-Site - Classroom course or workshop), '17th National Conference on Chronic Disease Prevention and Control' (NCDPHP, CDC, Webstream/Archived Webcast), 'A Citizen's Guide to Disaster Assistance' (Federal Emergency Management Agency, Web-based Training - Self-study), and 'A Grassroots Funding Model That Creates A Community Health Foundation Within A Public Health Agency' (APHA, On-Site - Classroom course or workshop). At the bottom, there is a pagination bar showing 'Page 1 of 8' and a navigation menu with 'Previous', 'First', 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z', 'Last', and 'Next'.

4. After clicking the **Create Report** button the export will open in a new window with a prompt to either open the document or save the document to your computer. We recommend that you first save the document to an appropriate location on your computer before modifying the data to suit your needs.

Evaluation Results Export

The Evaluation Results Export gives you a raw data dump of data collected from all Course Evaluations. In order to generate an Evaluation Results Export:

1. Click the **Administration** tab, then click **Reports**, click **Evaluation Results**, and finally click **Click Here to Generate Evaluations Report**.
2. Select the name of your course in the **Courses** drop down list.
3. Select the name of your Evaluation from the resulting list of **Course Evaluations**.

List Evaluations by Course

Courses

KMi test course - Web-based Training - Self-study(Online) - KMi - Matthew McGuire test course

Course Evaluations

(Click the down arrow to select an evaluation, if you do not want all evaluations to be in the export)

Evaluation for KMi Test Course - National/Colorado

Aggregated

Create Report

4. If the selected evaluation was set as **Anonymous Results** then you will only be able to pull aggregated data. However, if the selected evaluation was not set to be anonymous then you will have the option of selecting the Aggregated export, or the Personal export.
 - a. **Aggregated:** Provides all evaluation questions along with statistical information regarding submitted responses for each question.
 - b. **Personal:** Provides all evaluation questions along with all responses, including the name of the user that submitted each response.
5. Click **Create Report**. You will generally be prompted to either **Save** or **Open** the report. If you choose to open it immediately as opposed to saving it, be sure to save a copy from Excel.

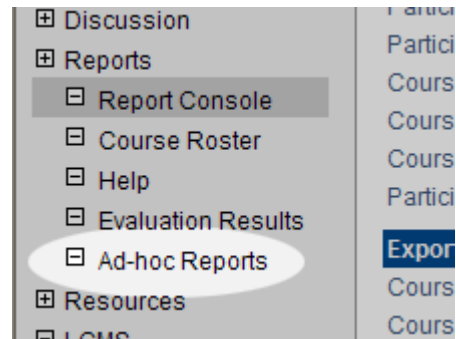
Ad-Hoc Reporting

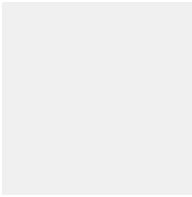


Finding Ad-Hoc Reporting

The process of Ad-Hoc reporting allows you to create and save custom reports for use at any time. You are able to define the data elements that are displayed in the report, how the report is displayed, and add conditions (parameters) to the report in order to more clearly define the set of data you report on.

In order to use Ad-Hoc reporting:

1. Go to **Administration, Reports, Ad-Hoc Reports**.
2. By default the Ad-Hoc Reports page will display a list of all reports that are available to you.
 - a. Clicking the Report Name of any report will run the reports. When reports run they are launched in a new pop-up window.

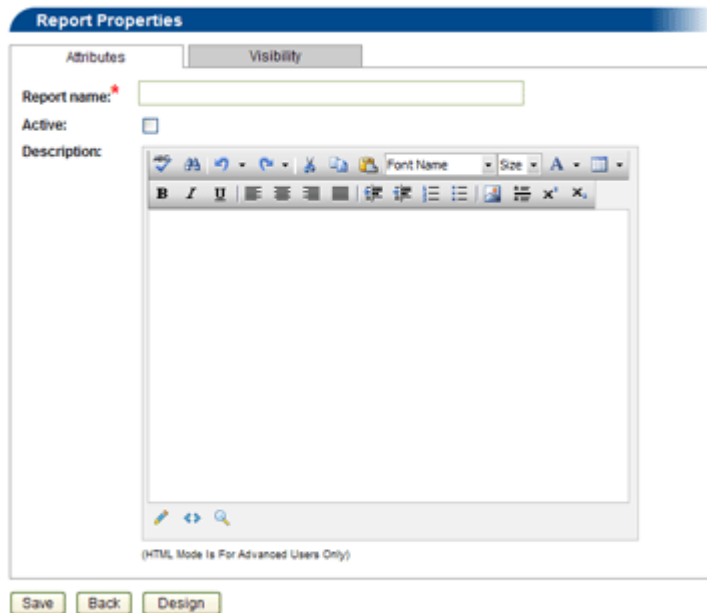


- b.  Clicking the Copy/Clone icon will make a copy of the report that you can re-name and modify any way you like. This is a good way of making your own version of a report created by another administrator.
- c.  Clicking the pencil icon will take you to the Report Properties page. This is where you define the name and description of the report as well as set the visibility for the report (who can see/run the report).
 - i. **Note:** You can only edit reports you have created.
- d.  Clicking this icon will take you to the **Report Designer**. This is where you define the fields and parameters for your report as well as what groups the data will be pulled from.
 - i. **Note:** You can only design reports you have created.

Adding New Ad-Hoc Reports

To add a new report:

1. From the Ad-Hoc Reports page, click the **Add** button, located at the bottom-left and top-right of the page.
2. On the **Attributes** tab, enter a report Name and a Description. Don't worry about checking the **Active** checkbox until you have finished designing the report.



3. Click the **Visibility** tab to define who will be able to see/run your report.
 - a. By default, **Personal** is selected. When a report visibility is defined as personal, you are the only administrator who can see and run the report. To share the ability to run your report, select **Shared**.
 - b. Once you select Shared you can select a group on which to share your report. Again, you are always the only person who can edit the design of your report – other administrators you share your report with can only view and run the report.
4. Once you have the Attributes and the Visibility tabs filled out, click **Save** to return to the Ad-Hoc Reports list, or click **Design** to save your report and go straight to the Report Designer.




Designing Ad-Hoc Reports

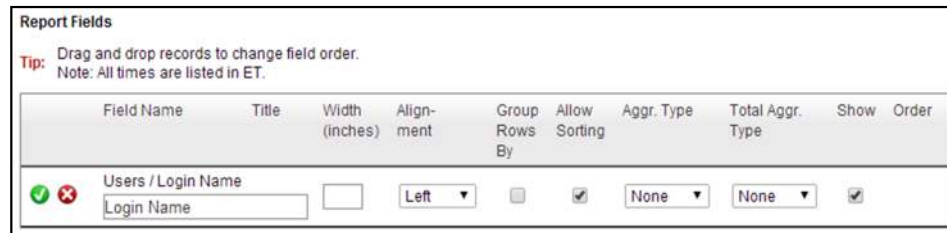
You can design your report around three different sets of data: Course Registrations, Courses, and Users. This does not mean that user information cannot be included in a report if you select **Course Registrations**, it simply means that you are primarily concerned with Course Registrations. The second step in building your report involves selecting available fields as either Report Fields or Report Parameters.

Report Fields are data elements that will be displayed in your report. There are no specific conditions placed on the Fields.

Report Parameters are data elements that you use to place conditions on the data that will be pulled into your report. Parameters are not displayed in the report – they are only used to help select the appropriate data.

To build your own Ad-Hoc report:

1. Click the **Design** icon from the Ad-Hoc Reports page or the **Design** button from adding a new Ad-Hoc report.
2. Select the appropriate **Data Table**.
 - a. Course Registrations should be selected if you are concerned about actual registration data.
 - b. Courses should be selected if you are concerned about course information without regard to users or registrations.
 - c. Users should be selected if you are concerned about user records without regard to courses or course registrations.
 - d. **Note:** you can change the data source at any time by clicking **Change data source** within the Designer. This will, however, clear out all selected Fields and Parameters, as those you have selected might not be available for another data set.
3. All available data elements will be displayed in the **Available Tables/Fields** list. You can view and navigate this list just as you would the Grouping tree – click the + boxes to open tables to view data elements within.
 - a. Tables are listed in **bold** characters and cannot be added directly to a report. Data fields within tables are listed underneath the table they belong to.
4. Click the  icon to add any field to your report as a Report Field.
5. Click the  icon to add any field to your report as a Report Parameter.
6. **Adding Fields:**
 - a. Once you click the  icon the field will be added to the list of Report Fields. You are able to edit certain design elements of each field as you add them.




- b. In the image above we have added “Login Name” to our report as a Report Field in order to display the actual Login Name of each user within our report. We can also define:
 - i. **Title** – this will be the title of the column within our report.

- ii. **Width** – this will define the actual width of the column as it would be printed on a piece of paper. Defining the width of each column can help you maximize space in order to create a report that will print out as you need it.
- iii. **Alignment** – this defines how the text of the item will be aligned within the report (left justified, right justified, and centered).
- iv. **Group Rows By** – by checking this box your report will be “Grouped By” each user’s Login Name. As opposed to displaying the Login Name for every entry belonging to an individual user in our report when Grouped By is selected the Login Name will appear once for each user and all entries for the individual user will be grouped together before displaying the Login Name and information of the next user.

Due to the nature of “Group By,” it must be applied to the first Report Field in your list. You can check “Group By” for multiple fields, but they must be applied sequentially from the top down.

- v. **Allow Sorting** – this will allow you to sort each individual column within your report.
 - vi. **Aggregation Type** – This will allow you to select certain Aggregation Functions on the selected Report Field. For example, if we apply “Count” to our Login Name field, we will get one report entry with a total “Count” of all Login Names, as opposed to a list of each individual Login Name.
 - vii. **Aggregation Total** – This will allow you to add a total “Count” field at the bottom of your report, displaying the total number of entries for the Report Field. As an example, in the scenario above we applied “Count” to the Login Name field. This will give us one entry in our report. Therefore the Aggregate Total of that column within our report will display “1.”
 - viii. **Order** – When you have multiple Report Fields, you can use the up and down arrows to adjust the order they will display in your report.
 - ix. **Show** – each item will only display in your report if the “Show” box is checked. This is handy if you want to remove an item from being visible in a final report without completely redesigning your report.
- c. Once each field property is set, click the computer disc icon to save the changes.
 - d. To edit any of the fields click the pencil icon. To delete any of the fields click the blue ‘x’ icon.



7. Adding Parameters:


- a. Once you click the  icon the field will be added to the Report Parameter list.

Report Parameters

Tip: To edit report parameter properties, click on the pencil button.

AND OR Advanced





Field Name	Operator	Value
  Users / Active	=	<input type="checkbox"/> Ask value during execution True

- b. In the image above we have added Users/Active as a parameter. This will allow you to define Active users in the report, inactive users in the report, or both.
- c. Each parameter entered must be defined by an Operator and a corresponding Value. In the example above if you wanted only Active users in your report select = as the operator and **True** as the value. When the report runs, it will only include Active users. If you define your Active parameter as **Active = False** then the report will only include inactive users.
- d. Another example:
- Let's say you want to include only users that entered Public Health Foundation as their Organization. Click the  icon for Users/Organization to add it to your parameter list.
 - Next, define a value; enter Public Health Foundation. Since some users might have entered "PHF" as their organization, you can add a second Users/Organization parameter in order to catch these users as well. In that scenario our parameter list would look like this:

Report Parameters



Tip: To edit report parameter properties, click on the pencil button.

AND OR Advanced

Field Name	Operator	Value
  Users / Organization	=	PHF
  Users / Organization	=	Public Health Foundation

- Note that **OR** is selected just above the list. By selecting OR you are going to pull all users whose **Organization = 'PHF' OR 'Public Health Foundation.'**
- If **AND** or **OR** is selected above the list, you cannot use a combination of **AND** and **OR** when adding parameters; all parameters will be viewed as one or the other. If your report requires both, the **Advanced** option allows **AND** and **OR** to

be used. As this is an advanced feature, please contact KMi if you need help creating a report which uses the **Advanced** option.

- v. To edit any of the parameters click the pencil icon . To delete any parameter click the red x icon .
 - vi. You also have the option of entering the **Value** upon execution of the report. For example if you want to enter the Organization name you are looking for each time you run the report so that you can gather information on different Organizations, check the **Ask Value During Execution** checkbox. You will be prompted to enter the value when you run the report.
8. Once you have your report fields and parameters set, click the **Data Restriction by Group** tab. This tab looks similar to the standard Visibility tab – however, instead of defining who can see or run your report, in this tab you are defining what Groups will be included in your report when it is run. For example, if you want to limit your report to only those users who belong to the group “Fire Department” in the example (to the right), just check the Fire Department group.





You can change the Data Restriction at any point in time so that you can easily run one report on different groups as needed.

- 9. At any point in time during the design phase you can click the **View Sample** button (located in the top-right corner of the design page) to get a sample of how your report will look. This sample report pulls actual data based on the current design configurations, but will stop execution at 100 records. This allows you to see your report before you are completely finished so that you can more easily tweak the visual design or adjust any parameters.
- 10. Once you are happy with the design of your report click the **Save** button to save all of your changes and return to the Ad-Hoc Reports page. If your report is new and has never been activated you will be asked to set the report to Active before returning to the Ad-Hoc list.
- 11. Once you have returned to the Ad-Hoc reports page click the Report Name to run your report.

Editing Ad-Hoc Reports

You can edit and change the design or sharing aspects of your report at any time.

1. To change the title or description of your report or to deactivate your report, click the Pencil  icon next to the Report Name in the Ad-Hoc list. Make any necessary changes to the Attributes tab and click **Save**.
2. To change the visibility of your report, click the Pencil  icon next to the Report Name in the Ad-Hoc list. Click the **Visibility** tab, make any changes in Group Selection or change from **Shared** to **Private**, and click the **Save** button.
3. To edit any aspect of the Report Design click the Design icon. Once you have made any changes to the Fields, Parameters, or Data Restrictions, click the **Save** button.

Advanced Ad-Hoc Reports

Please note, the use of Advanced Ad-Hoc reports is intended only for those administrators who:

- a) Are already comfortable with the functionality of the basic Ad-Hoc reports.
- b) Have familiarity with using multiple operators in a logical statement (a good test of this: can you describe or define an “exclusive or” statement?).
- c) Have a basic understanding of using AND/Or in a logical statement.

If you do not have this knowledge, I can recommend 2 sources that will help:

1. http://en.wikipedia.org/wiki/Symbolic_logic
2. http://en.wikipedia.org/wiki/Propositional_logic

These sources will not provide 100% of the required knowledge, but can assist with basic understanding.

Creating Advanced Ad-Hoc Reports

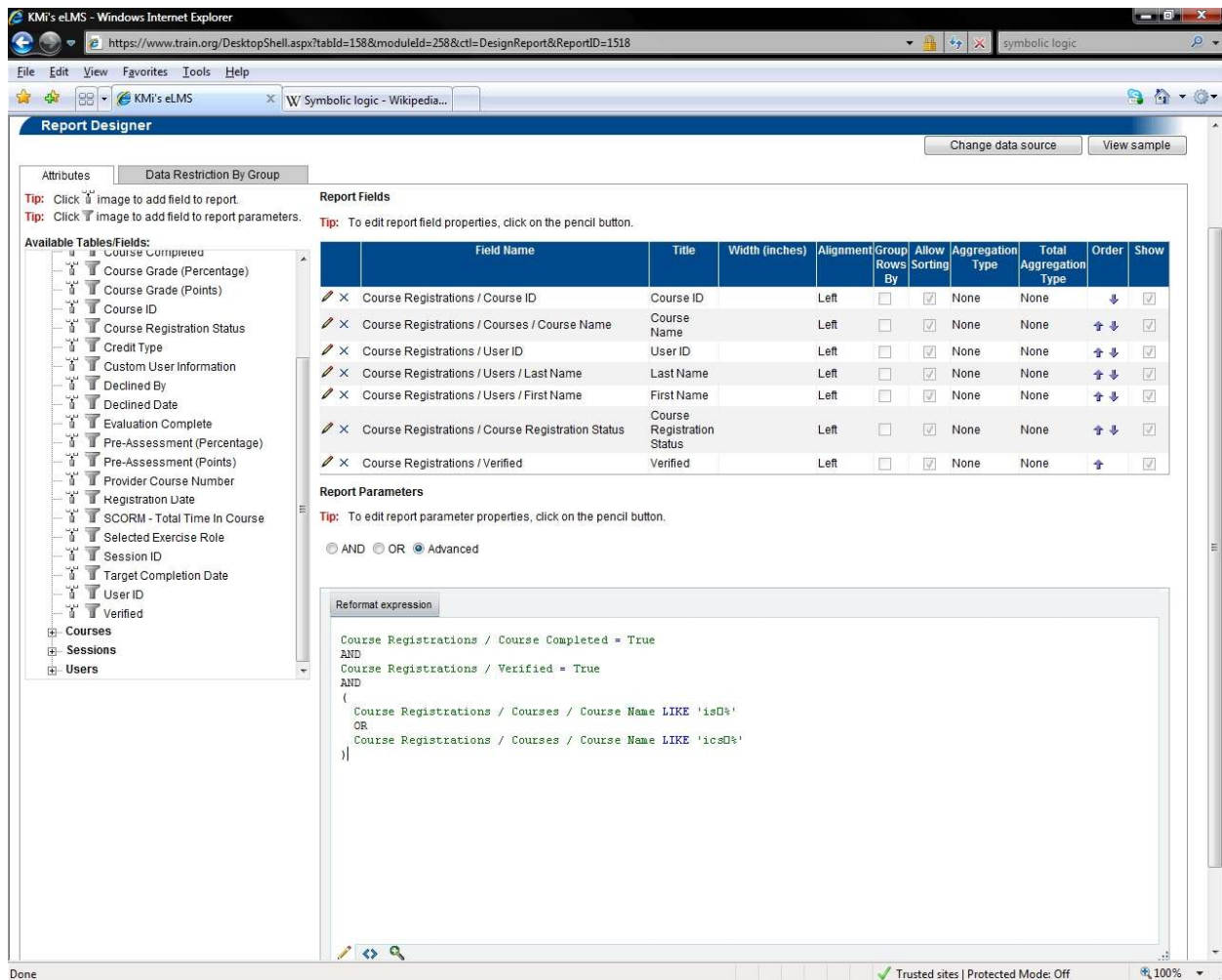
This section assumes that you have already created a working, functional, basic Ad-Hoc Report and that you know how to access the ‘Report Designer’ interface for the Ad-Hoc reports.

Of course, you *can* also start in the **Advanced** mode; however, the initial adding of parameters will not be separated by existing operators, you need to add these yourself by typing and/or between *each* parameter (see step 2 below).

1. Once in the ‘Report Designer’ interface, select the **Advanced** radio button located between your report’s list of fields and parameters (AND OR Advanced).
 - a. The page will reload and you notice that your existing parameters are now displayed differently than before. They now appear in a text editing window.
 - b. Initially, between each parameter, the basic and/or operator will appear.
2. You can still add new parameters and fields to the report even after you have selected the **Advanced** radio button. This is done using the same ‘Available Tables/Fields’ list and icons as in the basic functionality.

- a. When adding new parameters, you will need to define the function and value of the parameter. These options appear in a temporary popup window. When the values are set, click **Save**.
 - b. Each new parameter you add will be added to the text window at the exact spot that your cursor last flashed. PAY ATTENTION TO THIS! If you are going to add a new parameter, place your cursor in the text window where you want the parameter to show.
3. To reorder your parameters within the advanced parameters text field, simply left click on the parameter and drag it to the appropriate spot within the query.
4. **Between each parameter, you need to add AND/ OR. The parameters text cannot start with AND/ OR; rather, it must start with an actual parameter. This involves the advanced knowledge mentioned above.**
 - a. **When new parameters are added in the advanced function, they do not have any AND/ OR operators assigned. You need to do this manually. On either side of the parameter (as the needed logic dictates – see knowledge references above) type AND/ OR (the determination of using AND/ OR is also defined by the needs of the logic – see references above).**
5. You can also use parentheses to group and/or statements. This requires the advanced knowledge mentioned above.
 - a. To add parentheses, you must include an opening a closing parenthesis.
 - b. Parentheses can be added between parameters and operators and vice versa; however, they cannot be added between two operators or two parameters.
6. To edit an existing parameter, right click on the parameter and select **Edit Parameter**.
 - a. This will open a temporary window where you can change the function (e.g., like, =, !=) and value (e.g., ask value during execution or use specified value) of the parameter. When the changes are complete, click the **Save** button.
7. To remove a parameter from the text field, left click on the parameter and hit the **Delete** key on your keyboard.
8. When your parameters are appropriately set with the correct values and functions; and your operators exist between each parameter; and your parentheses reflect the appropriate logic, use the **Reformat Expression** button at the top of the parameter text window.
 - a. If errors exist in your expression, the system will indicate which line those errors are on. Errors need to be corrected before the report will function as expected. Errors will tend to result from illogical use of parentheses and operators.

Below is an example of an Advanced Ad-Hoc Report:



This report will return a list of all users who have completed and are verified for either an IS x00 or ICS x00 course (e.g., IS 700 or ICS 100).

Ad-Hoc Report Data Elements

The following data elements are available for use as parameters or fields in Ad-Hoc reporting:

tableName	fieldName
Course Registrations	CourseID
Course Registrations	StatusName
Course Registrations	PreAssessmentPercentage
Course Registrations	PreAssessmentPoints
Course Registrations	CourseGradePercentage
Course Registrations	CourseGradePoints
Course Registrations	EvaluationCompleteFlag
Course Registrations	CourseCompleted
Course Registrations	CompletionDate
Course Registrations	TargetCompletionDate

Course Registrations	CreditTypeName
Course Registrations	CertificateTypeName
Course Registrations	ApprovalBy
Course Registrations	ApprovalDate
Course Registrations	DeclinedBy
Course Registrations	DeclinedDate
Course Registrations	UserID
Course Registrations	Verified
Course Registrations	SessionID
Course Registrations	RegistrationDate
Course Registrations	Active
Course Registrations	InitialLaunchDate
Course Registrations	LastLaunchDate
Course Registrations	UpdatedDate
Course Registrations	CourseRegistrationID
Courses	CourseID
Courses	CourseName
Courses	Description
Courses	CourseURL
Courses	MaterialsOrderURL
Courses	SkillLevelName
Courses	CourseFormatName
Courses	Sponsor
Courses	CourseProviderUserName
Courses	ListPrice
Courses	ProviderApprovalBasedFlag
Courses	ApprovalStatusName
Courses	ApprovedBy
Courses	ApprovalDate
Courses	Active
Courses	DeactivationDate
Courses	CreatedDate
Courses	UpdatedDate
Courses	CourseLanguages
Courses	ProviderCourseNo
Course Attributes	CourseID
Course Attributes	Category
Course Attributes	CourseAttributeType
Course Attributes	Value
Sessions	SessionID
Sessions	Location

Sessions	ScheduleDate
Sessions	AttendCap
Sessions	RegistrationDeadline
Sessions	Description
Sessions	ShowInLearningCalendar
Sessions	ShowInUpcomingEvents
Sessions	Active
Sessions	CourseID
Sessions	SeatsAllocated
Schedule	SessionID
Schedule	Location
Schedule	Date
Schedule	StartTime
Schedule	EndTime
Users	UserID
Users	FirstName
Users	LastName
Users	LoginName
Users	Email
Users	Address
Users	Address2
Users	City
Users	State
Users	Zip
Users	County
Users	Phone
Users	Mobile
Users	Fax
Users	Pager
Users	Organization
Users	Title
Users	Country
Users	Active
Users	LastLogin
Users	CreatedDate
Users	TimeZoneName
Users	AdminNotes
Users	IsAdmin
User Attributes	UserID
User Attributes	Category
User Attributes	UserAttributeType

User Attributes	Value
Sessions	SessionID
Sessions	Location
Sessions	ScheduleDate
Sessions	AttendCap
Sessions	RegistrationDeadline
Sessions	Description
Sessions	ShowInLearningCalendar
Sessions	ShowInUpcomingEvents
Sessions	Active
Sessions	CourseID
Sessions	SeatsAllocated
Credit Types	CourseID
Credit Types	CreditType
Regions/BG Advance/Group functions	Regionexample
Regions/BG Advance/Group functions	BusinessUnitexample
Regions/BG Advance/Group functions	SpecialtyAreaexample
Regions/BG Advance/Group functions	CompanyNameexample
Regions/BG Advance/Group functions	Attribute_1
Regions/BG Advance/Group functions	UserID
Subject Areas	SubjectArea
Subject Areas	CourseID
Audiences	Audience
Audiences	CourseID
Groups Assignments	GroupPaths
Groups Assignments	UserID
Groups Assignments	GroupNames
Group Attributes	Company
Group Attributes	UserID
SCORM	CourseID
SCORM	Title
SCORM	ManifestURL
User Data	ScID
User Data	CourseID
User Data	CourseRegistrationID
User Data	LessonStatus
User Data	ScoreRaw
User Data	TotalTime

Basic Information to Provide to Users

Creating a TRAIN Account

Anyone can create a TRAIN user account. It's a free process and is open to all. To create account, you'll need a few pieces of information, such as your email address and work setting. Once your account is setup, you'll have full access to your state's list of training courses

Important: Most of the content listed on TRAIN is generated by third parties. This means that the content may have been created across multiple platforms and the technical requirements for accessing each course may vary depending on the individual Course Provider's preferences and settings. Please see the section below.

TO CREATE A TRAIN ACCOUNT:


1. Locate and access your state or organization's portal address from the list above. Or, if you don't see an appropriate portal listed above, use www.TRAIN.org.
2. Within the portal page, click the **JOIN** button. This will be on the left side of the page
3. Read and agree to the [TRAIN Policies](#).
4. The next page in the account creation process will guide you through providing the required information for your TRAIN account. Any field noted with a red asterisk (*) is required – this will remain true through the site. Your TRAIN account will not be created until all required fields are provided.

Important: If you would like to receive emails from TRAIN, please consider the email receipt options carefully. There are two options for receiving email:

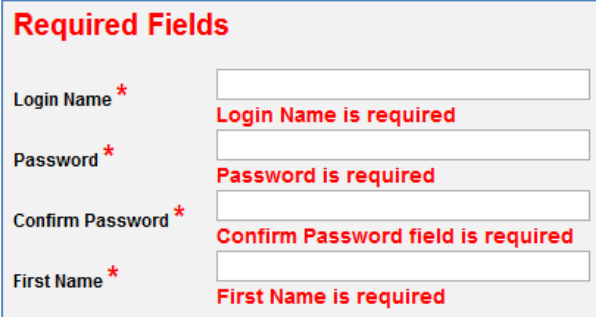
- a. *I would like to receive emails from TRAIN*
- b. *I would like to receive notifications about the updates by email*

For more information on the TRAIN email options and processes, please see the Email Receipt Options section below.

5. Once your required fields are complete, the next page displays a dynamic series of dropdown menus, available by clicking on the "Select Groups" button. This is how your *group assignment* is determined. Everything in TRAIN has a group assignment. Items assigned to one group, cannot access items assigned to another group. Groups can be divided in a variety of ways in TRAIN;



Creating a New Account





some examples include geographically (states, counties, cities), organizationally (health department, department of corrections, police department), professionally (physicians, nurses, general public health staff), among others. Groups help ensure that the appropriate content is delivered to the appropriate users. In selecting your groups, please be as accurate as possible (you can always change your group assignment after your account is created). If you have questions about which groups to place yourself in, please contact your TRAIN affiliate administrator.

- a. Within the group assignment process, you are allowed to select groups for several different TRAIN portals: your state portal; Medical Reserve Corps (MRC); and the Centers for Disease Control and Prevention (CDC); and the Health Resources and Services Administration (HRSA).
- b. It is strongly suggested that you add yourself to the corresponding state portal groups. To do so, click the 'Select Groups' button next to that portal on the group selection page.
- c. You can also select group for HRSA, CDC, and MRC participation. To do so, simply click the 'Select Groups' button next to each portal. A popup window will appear to walk you through selecting the correct groups.

Note: Selecting "Remove Groups" will remove all groups below that portal only.

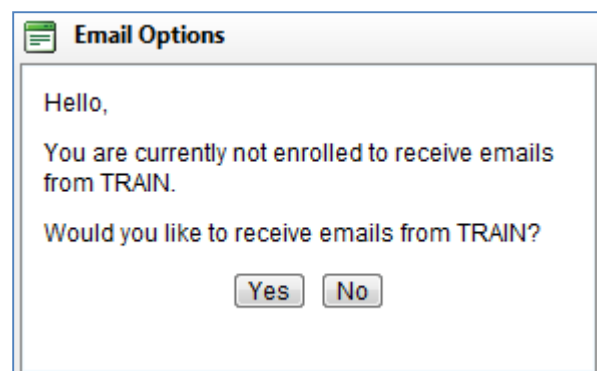
6. Next, you will describe your professional role. Use the checkboxes next to each listing and follow the onscreen instructions.
7. You're almost done! The last required step, is to provide your work settings. Use the checkboxes next to each listing and follow the onscreen instructions.
8. The last step is demographic information and is entirely optional; but we encourage you to provide your feedback as it will help us improve the TRAIN experience. Thanks!

Important: When creating a new TRAIN account, please do not use your browser's 'Back' button. If you need to navigate the account creation wizard, please use the 'Back' and 'Next' buttons   provided within the interface.

Email Receipt Options

As a TRAIN user, you have the option to receive emails from TRAIN or not. TRAIN automatically sends important email reminders, updates and notifications. You can opt-out of these notifications; but in doing so, may miss vital information.

If you do not want to receive emails from TRAIN, simply follow the onscreen instructions and select **No** when prompted about continuing to receive TRAIN emails



If you do want to continue to receive TRAIN emails, select **Yes** when prompted. Next, confirm that the email we have on file for you is valid. Lastly, open your email inbox, locate the confirmation message from TRAIN and click on the confirmation link in that email. This will confirm your email address and you will continue to receive emails from TRAIN.

If you need to change your email receipt settings later, please follow the steps outlined in the [Opting Out of TRAIN Emails](#) and [Opting In to Receive TRAIN Emails](#) sections below.

Opting Out of TRAIN Emails

1. If you are a new user setting up your account for the first time and you do not wish to receive any emails from TRAIN, leave the, *I would like to receive emails from TRAIN*, option unchecked. This option will appear after you agree to the TRAIN Policies.
2. If you are an existing user and you do not want to receive emails from TRAIN, login to your TRAIN account. On the home page, click the **My Account** link and uncheck the, *I would like to receive emails from TRAIN*, option. Be sure to save your settings changes!

Opting In to Receive TRAIN Emails

If you want to receive emails from TRAIN, you will first need to follow a few simple steps to confirm your email address.

TO RECEIVE TRAIN EMAILS:

1. Log in to your TRAIN account
2. On the Home page, click the **My Account** link
3. In the My Account interface, below the personal data fields, select the option, *I would like to receive emails from TRAIN*.
4. Click **OK** to send the confirmation email
5. Open your email account and locate the confirmation email from TRAIN. It may take a few minutes for the confirmation email to be sent. The confirmation email might also be filtered as spam, so be sure to check your junk folder.
6. Lastly, click on the link in the confirmation email and you're done. You can now receive emails from TRAIN.
7. TRAIN will periodically (approximately every 12 months) ask you to reconfirm your email address. This is for your protection and to help prevent the delivery of TRAIN emails to those users who wish not to receive them.

Navigating TRAIN

The TRAIN navigation tools are designed with the end user in mind. They are intended to be simple and universal. This means that navigation lists or tabs on one page, will function almost identically on all other

pages. We hope you will feel free to explore the TRAIN site; finding your way back is easy, so don't be afraid to lose yourself in TRAIN!

Tab Navigation

The tabs across the top of the TRAIN site are the main navigation for TRAIN. These tabs divide TRAIN content into logical parts. The most common access points are **Course Search Box** and **Resources**. These tabs contain the most content and are good places for new users to start looking for learning material.

List Navigation

On various pages throughout TRAIN, you will encounter some additional list menus on the left side of the page. Whereas tabs help navigate across pages in TRAIN, the list menus are aimed more at internal page navigation. Although not all lists will function this way, most list items, when clicked, will refresh the content of the current page and will not move you to a new page. For example, if you navigate to the **Resources** tab, you will then use the list items on the left to select individual resources.

The screenshot shows the CDC TRAIN website dashboard for a user named testpaulone. The page is titled "testpaulone Dashboard" and includes a "My Action Items" section. A "My Learning" section is highlighted with a green box, containing a table of courses. A "Search" box is also highlighted. A "Spotlight and Other Links" section is highlighted at the bottom right. A "My Learning" tab is highlighted at the top. A "My Learning" list menu is highlighted on the left side of the page. A "Spotlight and Other Links" list menu is highlighted at the bottom right. A "Spotlight and Other Links" list menu is highlighted at the bottom right. A "Spotlight and Other Links" list menu is highlighted at the bottom right.

My Learning

Search

Keyword or Course ID

testpaulone Dashboard

My Action Items

My Learning

Course Name	Status	Format
2005 09:CMED PHGRs: Toward an Epidemiology of Elder Abuse	In Progress	Webcast (on demand)
Stress and Management Techniques Module 1024346	In Progress	Web-based Training - Self-study
WPHN Orientation: 1. PHN Practice Model	Post-Assessment Pending	Web-based Training - Self-study

My Certificates

My Training Plans

My Surveys

My Links

Announcements and Upcoming Events

Spotlight and Other Links

Announcements and Upcoming Events

Spotlight and Other Links

Groups

The TRAIN grouping structure is an essential part of TRAIN. So much so, that it is beneficial for end users to at least be aware of it. *Everything* within TRAIN, from user accounts, to course links, to announcements, has a group structure assignment. The benefit is that users can only access content assigned to the same group as their user account. For example, in the group structure illustrated to the right, imagine a user assigned to the Craig County group. Users in this group will see any content assigned to Craig County, Alleghany or Virginia. A user in the Craig County group will not see content assigned to Arlington, Clinton Forge or any other region or county. If you are trying to locate a piece of content, but cannot, it's possible that content has not been opened to your group. This is something your TRAIN state administrator can clarify and correct.



Managing Your TRAIN Account

Some users are very involved in managing their TRAIN account. Some users only access their account once a year for recurring training requirements. The amount of user involvement with TRAIN varies greatly. Fortunately, if you're a seasoned pro or seldom visitor, managing your TRAIN account is a piece of cake!

After logging into your TRAIN account, on the Home page, you should notice a section of the page called *Dashboard*; there is also a **My Account** link in the upper right corner of the banner. This is where most of your actual account management will stem from.

My Account

In the TRAIN banner, you will notice a **My Account** link. Use this link to access the My Account management interface. Within the My Account management interface, there are three tabs:

[| My Account | Logoff](#)

- Details
- Groups
- My Profile



▶ **My Action Items**

▼ My Learning

Course Name ↕	Status	Format
2005 09:CMED PHGRs "Toward an Epidemiology of Elder Abuse"	In Progress	Webcast (on demand)
Stress and Management Techniques Module 1024346	In Progress	Web-based Training - Self-study
WPHN Orientation: 1. PHN Practice Model	Post-Assessment Pending	Web-based Training - Self-study

TRAIN Transcript Archived Courses Current Courses

▶ My Certificates

▶ My Training Plans

▶ My Surveys

▶ My Links

The sections below will outline what information is accessible for each tab in the My Account management interface. When making changes to any tab in the My Account management interface, be sure to use the 'Save and Back' button at the bottom of the page to save your changes. You can also use the 'Cancel' button to move back to the TRAIN Home page without saving you changes

Details

Within the Details section of the My Account management interface you can adjust the following personal information:

- First and last name
- Account password
- Personal title, organization and department information
- Address data
- Contact email and telephone
- Password security question

Within the *Details* section, you can also request the Course Provider and Conference Presenter roles. The details of this process are discussed below in the *Becoming a Course Provider* and *Becoming a Conference Presenter* sections of this handbook.

Groups

The Groups section of the My Account management interface will show your state's grouping structure. This will appear as a nested tree (meaning groups can have parent, child and sibling groups). Groups to which you are assigned will appear as bold within the tree.

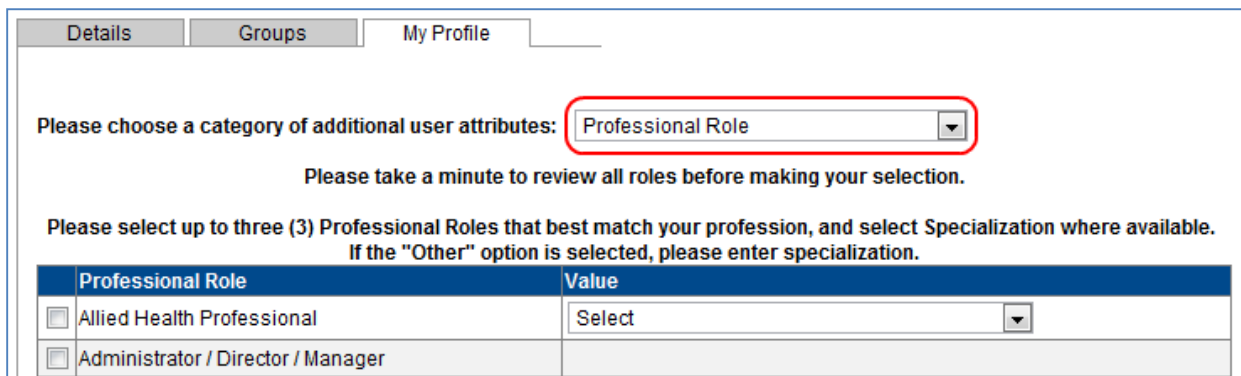
Below the group tree are two buttons, 'Edit' and 'Edit Primary Groups'

- Use the 'Edit' button to completely reset and redefine your group assignment
- If you are assigned to multiple group, you can use the 'Edit Primary Groups' button to define your *primary role*. For example if you are assigned to two different departments, but most of your work is for just one department, you can list that department group as your primary group.

My Profile

The My Profile section of the My Account management interface allows you to set your *user attributes*. User attributes can be customized per state; but there are also national user attributes that every user must provide. User attributes are a way for state administrators to collect information that falls beyond the scope of typical account data.

At the top of the My Profile interface, there is an attribute dropdown menu. Use this menu to change which attribute you want to edit. Selecting a new item in the dropdown will change the selection options shown on the page.



The screenshot shows the 'My Profile' tab selected in a navigation bar. Below the tabs, there is a dropdown menu labeled 'Please choose a category of additional user attributes:' with 'Professional Role' selected. A red box highlights the dropdown. Below the dropdown, there is a warning: 'Please take a minute to review all roles before making your selection.' Below that, instructions state: 'Please select up to three (3) Professional Roles that best match your profession, and select Specialization where available. If the "Other" option is selected, please enter specialization.' Below the instructions is a table with two columns: 'Professional Role' and 'Value'.

Professional Role	Value
<input type="checkbox"/> Allied Health Professional	Select
<input type="checkbox"/> Administrator / Director / Manager	

Becoming a Course Provider

One of the unique things about TRAIN is that *any* user can potentially become a Course Provider. But what exactly is a Course Provider? Truth be told, the Course Provider role varies quite a bit from state to state. Nevertheless, a Course Provider can generally be thought of as a user within TRAIN who:

- Creates and uploads learning content to TRAIN

- Maintains existing learning content to keep it current and relevant
- Manages Course Rosters and Course Registration statuses
- Assists users with accessing uploaded content
- Works with TRAIN state administrator to accomplish the goals of TRAIN in that state.

TO BECOME A COURSE PROVIDER:

1. Becoming a Course Provider is an approval process. You will need to submit your TRAIN account, along with some additional details, to your TRAIN state administrator. If your administrator finds your application appropriate, they will approve you as a Course Provider. TRAIN state administrators can also decline or request more information about your Course Provider status.
2. Login to your TRAIN account go to the Home page
3. Click the **My Account** link in the TRAIN banner.
4. Scroll to the bottom of the My Account management interface and click on *Request Course Provider Role*. Upon clicking this link, a new form will be revealed at the bottom of the page.
5. Fill out the Course Provider form as completely and accurately as possible.
6. Click **Save**.
7. Your request will now be sent to your TRAIN state administrator for approval. You will receive a confirmation email as will your administrator.

Please choose your secret question and provide a ONE WORD answer.
You will be asked this question if you forget your password.

Question:* Best Friend's Last Name

Answer:* Doe

I would like to receive notifications about the site updates by email:

I would like to receive annual notifications to keep my account up to date:

Course Provider role

[Request Course Provider Role](#)

Conference Presenter role

[Request to Become a Conference Presenter](#)

Becoming a Conference Presenter

TRAIN Conferences are a relatively new feature. The Conference package allows Conference Providers (i.e., those folks who create and manage the conference record within TRAIN) to create a conference, give it sessions and then assign sessions to individual Conference Presenters. If you would like your

name considered as a potential Conference Presenter, you will first need to submit your name for approval on the Conference Presenter list.

The steps for doing this are almost identical to the steps for becoming a Course Provider.

TO BECOME A CONFERENCE PRESENTER:

1. Becoming a Conference Presenter is an approval process. You will need to submit your TRAIN account, along with some additional details, to your TRAIN state administrator. If your administrator finds your application appropriate, they will approve you as a Conference Presenter. TRAIN state administrators can also decline or request more information about your Conference Presenter status.
2. Login to your TRAIN account go to the Home page
3. Click the **My Account** link in the TRAIN banner
4. Scroll to the bottom of the My Account management interface and click on *Request to Become a Conference Presenter*. Upon clicking this link, a new form will be revealed at the bottom of the page.
5. Fill out the Conference Presenter form as completely and accurately as possible.
6. Click **Save**.
7. Your request will now be sent to your TRAIN state administrator for approval. You will receive a confirmation email as will your administrator.

Managing Course Registrations

Course Registrations are a huge part of TRAIN. Arguably, this is *why* users come to TRAIN, so they can register for courses and have their progress tracked and rewarded! This portion of the handbook covers the basics of registering for a course, launching the course and receiving credit for the course.

Important: Please note that the content posted on TRAIN is from third party providers. KMi cannot support or assist with technical issues that may arise in the course. If you do encounter an error within a course, please contact the course provider.

Registering for Courses on TRAIN

The Course Registration process can take on many forms. Course Registration also has a variety of access points. In short the process of Course Registration is pretty self explanatory; if there is a course on TRAIN that you would like to complete, you will need to register for that course. This will place you on the Course Roster. The first step to registering is locating the appropriate course. If you have already located the course you want to register for, feel free to skip to the Course Registration section of this handbook.



Locating Courses on TRAIN

There are a handful of ways users can locate courses on TRAIN:

- Course Search/Advanced
- Calendar
- Course ID
- Direct Link
- Administrator Assignment

Course Search and Advanced Tab

(Course Search is only available for some affiliates who have requested it; however, the Advanced tab links to the same interface)

To search for a course, you do not actually need to be logged in to your TRAIN account. However, we recommend that you do first login as login will be required to complete any Course Registration. More so, the search process has several search criteria for you to choose from. This means that you can search by different items such as, intended audience, by the course format, by the date the course was released, etc. This section will not cover each individual search criteria, but the inputs for each function in a very similar way. It's simply a matter of which criteria you want to search by. If you don't find what you're looking with one type of criteria search, feel free to try the others!

TO SEARCH FOR A COURSE:

1. Click the **Course Search or Advanced** tab in the top navigation bar; or simply enter your key word into the search field in the navigation bar.
2. If you use **Course Search or Advanced**, on the following page you can click **Browse** to see a full list of all courses. Or, you can click search to do a normal keyword search. Lastly, you can choose from any of the relevant criteria listed on the left. Choosing any of the search criteria options will open the parameters page for that criterion. Simply enter your parameters and click **Search**
3. The resulting list will display all courses that meet your search criteria. Click on the name of the appropriate course and you will be taken to the Course Details page
4. **Note:** For security purposes, the following words and characters are **not included** in search terms:

-	>	are	do	i	n	since	u	you
!	0	as	e	if	never	some	under	your
#	1	at	each	in	now	still	up	z
\$	2	b	f	into	o	such	v	
%	3	be	for	is	of	t	very	
(4	because	from	it	on	take	w	
)	5	been	g	j	only	than	was	
*	6	before	get	k	or	that	way	
,	7	being	got	l	other	the	we	
.	8	between	h	like	our	their	well	
/	9	both	had	m	out	them	were	
?	a	but	has	make	over	then	what	
@	about	by	have	many	p	there	where	
\	after	c	he	me	q	these	which	
^	all	came	her	might	r	they	while	
_	also	can	here	more	s	this	who	
	an	come	him	most	said	those	with	
+	and	could	himself	much	same	through	would	
<	another	d	his	must	see	to	x	
=	any	did	how	my	should	too	y	

Note: Under the Course Search or Advanced functions, there is also a **Browse My State** option.

Selecting this option will return all courses that originate from your affiliate state.


Note: State administrators also have the option to request that subgroups within their state be listed as search filters on the course search and calendar tabs. When this option is on, the requested group name will appear as an additional filter on the search pages. This filter will not remove courses that you have administrator rights to, but for end users, the filter will show a list of courses that are explicitly available for the defined group. The filtered course list will not include courses inherited via national availability

Saved Search Criteria


TRAIN allows users to save their search criteria. This is useful if you will be searching for the same type of course multiple times. With saved search criteria, you don't need to re-pick your search parameters; simply rerun your saved search.

Saved searches can also be set to send you an email notification when new courses are added to TRAIN that meet your saved criteria. This is particularly useful if you want to be notified when new courses on a particular subject are released. Turning on saved search notifications can save you the hassle of rerunning searches.

TO SAVE, EDIT AND RUN SEARCH CRITERIA:

1. Run your course search as normal.
2. Click **Save Criteria** after the search completes and the list of courses is returned.
3. Provide a name for the search criteria you wish to save.
4. There will be a checkbox option for receiving email notifications about new courses that meet your saved criteria.
5. To run a saved search criteria, simply click on the name of the saved data. When rerunning a search, the results will be updated live with the dynamic data inputted by the course providers
6. To edit any aspect of the saved search criteria, click the **Pencil Icon** () next to the appropriate criteria. To delete a saved search criteria, use the **Delete Icon** (X) next to the appropriate criteria.

Saved Search Criteria

 X [Advanced Search](#)

Search by Course ID

Every course in TRAIN has a Course ID. Sometimes, if you know exactly what course you're looking for; finding it by Course ID can be the easiest way. Over the years, we've found that TRAIN state administrators prefer Course IDs because they are unambiguous. Search by Course ID is only available after you have logged in.

TO SEARCH BY COURSE ID:

1. Login to your TRAIN account
2. Look to the TRAIN navigation bar
3. Enter the Course ID into the *Keyword or Course ID* field on the right side of the navigation items.
4. Click the search icon or hit enter on your keyboard
5. This will return a *one* course list, of the course record that matches your inputted Course ID. If no courses are returned, then the Course ID you entered might be incorrect or that course might not be available at the time.
6. Click on the name of the course and you will be taken to the Course Details page.

Calendar Tab

Important: Not all affiliates have access to the Calendar. For clarification on whether your affiliate has access to the Calendar, please consult your TRAIN affiliate administrator.

Within TRAIN, there are several formats a course can take on. Formats describe *how* the course is delivered. For example, an online course differs from a live event webinar. Online courses are available always and can be accessed on demand; whereas, live event webinars are only accessible for a specified period and at a specified location (either web or physical address). The Calendar, specifically, is designed to list *live event* courses. You will not find on demand online courses listed in the calendar.

If your affiliate has access to the Calendar, you do not necessarily need to login to see it. However, we recommend that you do login as any course will require login to complete the registration process.

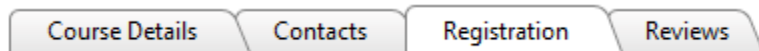
HOW TO LOCATE COURSES IN THE CALENDAR TAB:

1. Login to your TRAIN account
2. Click the **Calendar** tab in the top navigation bar
3. Notice the *key* in the upper left corner. This will help distinguish course availability.
4. Locate the day/month/week for which the appropriate course is scheduled. Use the **< Previous Month** and **Next Month >** links to navigate the Calendar.
 - a. You can also select a specific day from the mini calendar on the left side of the page.
 - b. Selecting a specific day will reveal a list of all sessions scheduled for that day. Simply click on the course name to access the Course Details page for that course.
5. Click on the time/session you wish to attend. This will take you to the Course Details page for that course.
6. On any day that has more than three sessions scheduled you can also click on the **Additional Info icon** (⋮). This will reveal a full list of all sessions scheduled for that day.

Note: conferences listed on the calendar will show under a single conference name. The conference name will appear on any day that has sessions scheduled. The individual conference sessions do not show on the calendar.

Course Registration Options

Once you have located the appropriate course, you will need to register for it. Registering for a course will create a unique registration record and will add your account to the Course Roster.



On the course details page, you will notice several tab. To register for the course, click the **Registration** tab.

From here, there are a variety of options you may have. All of these options will depend on how the Course Provider has setup the course. If you have question about registering for the course, please use information provided on the **Contacts** tab.

The specific registration process will also vary as per the Course Format. If the course is an online, on-demand course, you will see a **Launch** button. If the course is a live event course, such as a classroom event or webinar, you will have to choose from a list of times and locations. In this instance, you will have a **Register** button.

For online courses, clicking the **Launch** button will start the course in a new window.

Course Credits

If the course offers any type of credit, a drop down menu will appear on the **Registration** tab. You will need to select a Credit Type from the dropdown menu before registering for the course.

Prerequisites

Some courses have prerequisites that must be completed before you can register for the course at hand. These are listed on the **Registration** tab.

Multi-Step Registrations

Some courses include a “second step” as part of the registration process. This can be anything from the need to register at a third party website, to making a course related fee payment. If a second registration step is required, there will be a button: **Go to Step 2 of Registration**.

Waitlist Registration

Waitlists are a feature only available for live event courses. This option is made available at the discretion of the Course Provider.

Live event courses often have a maximum number of seats available. If the maximum number of seats is filled, there may be a waitlist option available. If this option is available you will see a button: **Add to Waitlist**. Click this button to be added to the course waitlist.

Waitlists can function one of two ways: manual registration and automatic registration.

If the Course Provider has opted for manual registration of the waitlist, when a seat becomes available, an email is sent to all users on the waitlist and then the open is redistributed on a first come first serve basis.

If the Course Provider has opted for automatic registration, if a seat becomes available, the system will automatically register the next user “in line” on the waitlist and an email is only sent to that one user.

Approval Codes

Some courses may require a code to authenticate your registration. If you do not know the code, you cannot register for the course. If this feature is activated for any course, on the **Registration** tab, you will see an entry field for the code. You must enter the code before registering; and then must complete the registration process. Only entering the code will NOT register you for the course.

Administrator Approvals

Some courses require manual administrator approval. In these instances, you will see a **Get Approval** button. Clicking this button will send a note to the appropriate administrator about your request. You will also receive email confirmation. If your request is approved, then you will have access to the course. If your request is declined, access to the course is not allowed. You will receive an email notice about the approved or declined status of your request.

Overlapping Conference Sessions

Many conferences may include a number of individual sessions with multiple scheduled times, allowing the user to determine their own overall conference schedule using the times listed. In the unlikely event that a user selects multiple sessions with the same scheduled time, an alert will appear in red lettering, stating: **Warning: There are overlapping sessions!** It is up to the user to ensure that their conference schedule does not include overlapping session times.

My Learning

The *Dashboard* section of the TRAIN Home page is where most of your course management will take place. Here you will find access to your course Certificates, Training Plans, in progress courses and more. You can also access Evaluations and Assessments from this section of the site.

Course Name	Status	Format
2005 09:CMED PHGRs "Toward an Epidemiology of Elder Abuse"	In Progress	Webcast (on demand)
Stress and Management Techniques Module 1024346	In Progress	Web-based Training - Self-study
WPHN Orientation: 1. PHN Practice Model	Post-Assessment Pending	Web-based Training - Self-study

[TRAIN Transcript](#)
[Archived Courses](#)
[Current Courses](#)

- My Certificates
- My Training Plans
- My Surveys
- My Links

My Learning

Your **My Learning** section contains recent, active Course Registrations. To see all registrations, click the **Current Courses** button. Each Course Registration will be displayed by name, format, and the Registration Status of the course. Next to each course listing is an **M** button. This is to **Manage** your individual course registrations.

Type	Name	Status	Manage
Online	_standalone assessment test (ps)	In Progress	M
Conference	2010 TAC Annual Meeting	In Progress	M
Compilation	Anti-Stigma – Addiction Campaign	In Progress	M
Online	Applied Epidemiology of Terrorist Events	In Progress	M
Online	KIPP Site Exam (1017138)	Post-Assessment Pending	M
Online	Psychosocial Impact of Disasters and Catastrophic Events Module -1008507	In Progress	M
Online	Region 3 MCI Trailer Course	In Progress	M
Online	VDH: VDH's Role in Emergency Response	In Progress	M

The Status of each course in My Learning depends on a number of factors. For example, a course might require you to get approval for a course or take a Pre-Assessment. In either of these cases your Status will be *Approval Pending* or *Pre-Assessment Pending*, respectively. Once you have met any registration requirements and have been placed into the Class Roster, your course Status will be in progress until the course has been completed.

From the My Learning screen you are also able to add Course Session information to your Personal Calendar by clicking the Calendar Icon next to the Course Name.

Note: Not all affiliates have the Personal Calendar feature. Contact your affiliate TRAIN Administrator for more information.

The **Management (M)** link allows you to update your progress for each course in your My Learning screen. To manage a particular course, simply click the **M** button to the right of the Course Name. The Course Registration Management screen allows you to:

- View your Registration Status.
- View and update your selected Credit Type: In order to change your Credit Type, select the Credit Type you wish to apply to the course from the Credit Type dropdown, and click **Update**.
- Mark your course as **Completed**: Click the **Completed** button to complete your course. This will move the course into your Transcript where a Course Provider will be able to *Verify* your completion.
- Move the course into your **Archive**: Click the **Archive** button to move the course into your Archives. This deactivates the registration
- Withdraw from the course: Click the **Withdraw** button to withdraw from the course. Remember to do this any time you are not able to attend a course, as there could be waitlisted users who could then attend.

Course Registration Management

You have registered for a course:

Animal Bites and Rabies

Registration Status: In Progress

Chosen Credit Type: CEU/CE: 0.05

If you would like to change credit type please select and click

To mark this course as "Completed" please click

To mark this course as "Archived" please click

To withdraw yourself from this course please click

Conference Registration Management

Conferences are setup one of two ways: either each session in the conference must be completed before the overall conference can be completed; or, if the administrator allows, you may be able to update the overall conference to a completed status, which will automatically update all conference sessions to complete. The on screen instructions will guide you through the conference session completion requirements.

My Training Plan

The **My Training Plan** section contains all of your *Training Plans*. A Training Plan is a group of courses that have been identified by an administrator – you must complete all courses in order to complete the Training Plan.

Training Plans can be assigned to you directly by an Administrator or you can sign up for a Training Plan through the Course Search.

The screenshot shows the 'My Training Plan' interface. At the top, there is a legend: a person icon for 'Added Manually', a person icon with a lock for 'Added By Administrator', and a pencil icon for 'Manage course registration'. Below the legend are two tips: 'Tip: To sort by any column, click the column heading. Or use default order.' and 'Tip: You must register for each course within the training plan by clicking on the title.' The main table has columns for 'Course Title', 'Format', 'Target Completion', 'Status', and 'Completion date'. The table lists several training plans and courses, including 'PHF New Hire Training', 'PHF 101', 'Advanced PHF Knowledge', and 'WVBPH SNS Preparedness Training Plan'. A 'Back' button is located at the bottom left of the table area.

	Course Title	Format	Target Completion	Status	Completion date
<input type="button" value="Remove"/>	PHF New Hire Training	Training Plan	Set		
	PHF 101				
	_PHF Demonstration Course (required)	Web-based Training - Self-study	-	Not Started	
	Advanced PHF Knowledge				
	_Advanced Test Course (required)	Web-based Training - Facilitated	-	Completed	5/21/2007
	WVBPH SNS Preparedness Training Plan	Training Plan	Set		
	Required SNS Courses				
	The Strategic National Stockpile (required)	Webstream/Archived Webcast	-	Not Started	
	The Strategic National Stockpile Program (required)	Webstream/Archived Webcast	-	Not Started	
	Working In a POD (required)	Web-based Training - Self-study	-	Not Started	

The graphic above illustrates:

1. Training Plans you have added to your own account through the Course Search are identified by the **Personal Icon** (). You can remove these plans from your list at any time.
2. Training Plans added to your account by an administrator are identified by the **Administrator Icon** (). These plans *cannot* be removed from your account and you must complete the Training Plan by the Target Completion Date to receive credit.
3. The Target Completion Date can be set or edited unless it has been established by an administrator.

4. You must still open and register for each individual course (by clicking the course name) to continue through the plan. Having a Training Plan assigned to your account does not automatically register you for each course.
5. Training Plan Administrators are able to monitor your progress through the plan – be sure to meet your Target Completion dates!

My Surveys

For more information on how to use the **My Surveys** link, please see the **TRAIN Surveys** section below

Transcript

Your **Transcript** lists all Course Registrations that are completed; as well as any Non-TRAIN Courses that have also been entered for your account.

To export your transcript to a PDF, simply click the **Export** button on the Transcript page. This will allow you to download a PDF list of your completed Course Registrations and Non-TRAIN Courses.

You can also post *Reviews* from your Transcript. To do so, simply click the **Reviews** button for the appropriate course.

Non-TRAIN Courses

One aspect of TRAIN is the ability to list courses, in your Transcript, that are not actually found on TRAIN.

This is useful for tracking training courses and external learning you have taken outside of TRAIN

TO ADD NON-TRAIN COURSES TO YOUR TRANSCRIPT:

1. Login to your TRAIN account and access your **Transcript**.
2. Click the **Add** button to the right of the Non-TRAIN Courses header.
3. On the resulting page, fill in each field, including required (*) fields.
4. When you have finished entering the course information, click **Save**.
5. The course will now be displayed in your transcript under Non-TRAIN Courses.

Non-TRAIN Course Details

* = required fields.

Title:*	<input type="text"/>
Start date:*	<input type="text"/>
Completion date:*	<input type="text"/>
Course URL:	<input type="text"/>
Course Format:	--Select--
Course Provider Name:*	<input type="text"/>
Course Grade Points:	<input type="text"/>
Course Grade Percentage:	<input type="text"/> %
Credit Type:*	--Select--
Amount:*	<input type="text"/>
Contact Name:*	<input type="text"/>
Contact Phone:	<input type="text"/>
Contact Email:	<input type="text"/>
Additional Info:	<input type="text"/>
Verified:	<input type="checkbox"/>

Note: Non-TRAIN courses must still be verified by an Administrator. Once an Administrator has verified the information, you will not be able to make changes to the entry.

User Transcript Certificate Uploads

TRAIN users have the ability to upload certificates to courses and non-TRAIN events listed on their Transcript page using the “Upload External Certificate” function.

UPLOAD EXTERNAL CERTIFICATE FUNCTION:

This feature can be found on the Transcript page:

Home→Dashboard→My Learning→TRAIN Transcript

1. The “Upload External Certificate” button will appear next to any course that does not have a certificate assigned to it.

Note: For registrations and non-TRAIN events where a user manually uploads and external certificate, the Upload External Certificate button will not disappear. Instead, if a user uploads an external certificate once, and then runs the upload process again, the most recently uploaded certificate will be saved and all previously uploaded certificates for the registration (or non-TRAIN course) will be deleted.

2. When the “Upload User Certificate” button is clicked, a window will appear to browse the file path and upload the certificate.
3. Find the appropriate file by clicking ‘Browse’.
4. Once the file is selected, click ‘Upload’.
 - a. The Certificate will now be uploaded and be available to view or print in the ‘Certificates’ page in “My Learning Record”.

In the “Certificate” page, the certificate will appear followed by the below indicators:

1. (Externally Uploaded) – For TRAIN courses that simply did not have a certificate assigned in the course.
2. (Non-TRAIN course) – For non-TRAIN courses where a user has uploaded an external certificate.

Certificates

Some courses on TRAIN offer Certificates upon completion or verified completion of the course. Any Certificate you earn through TRAIN will be stored in you’re **My Certificates** page. There are two different delivery methods for Certificates: Automatic and Manual. Automatic certificates will appear on your Certificate page as soon as the course is completed. Manual Certificates will not appear on your Certificate page until after the appropriate TRAIN administrator has verified your completion of the course. If you have any questions about what kind of Certificate any given course might have, please contact the course provider or listed course contact.

TO VIEW OR PRINT A CERTIFICATE:

1. Login to your TRAIN account and access the **My Certificates** link on the TRAIN Home page.
2. This will reveal a list of recent Certificates.
3. Click the Certificate print icon to the right of the page.
4. This open or download a PDF version of the Certificate.

Note: Inactive registrations (i.e., Course Registrations which appear in your Course Archive) will not have any Certificate available.

Course Archive

Your Course Archives is a repository for any courses that you have chosen to stop participating or courses that you have requested registration for and had your registration request declined.

If you wish to re-activate any course you have chosen to archive, simply click the Resume button and it will be moved back into your My Learning.

Re-Launching Courses

Many courses listed on TRAIN are built such that you can start, stop and resume the course without losing your progress. You can quit the learning content, come back to it later and the system will pick you up, in the course, exactly where you left off.

TO RE-LAUNCH A COURSE:

1. Login to your TRAIN account and click the **My Learning** link on the TRAIN Home page.
2. Click the **In Progress** link, that is in row, with the course you wish to re-launch
3. The course should open in a new window.
4. If the course is a live event course, you will be taken to the

Post-Course Options

Once you have completed the learning material for a course, there are a handful of post-course functions you can take advantage of. Some of these functions might be required by the course provider. If this is the case, you must complete these additional steps to receive a certificate/credit for the course.

Assessments and Evaluations

It's possible the Course Provider will require you to take an assessment of evaluation to fully complete all requirements. If this is the case, please see the Launching Assessments and Launching Evaluations sections below.

Course Reviews

Course reviews are an important part of the TRAIN Community experience. Course reviews help other users know how the course is being received by the TRAIN Community. They are also helpful to the

administrators and the feedback given in course reviews is used to improve course content, navigation and the general course experience.

Some courses will automatically prompt you to submit a review (this will be determined by the course provider). Other courses may require that you access the course review tab manually as is described below. If a course does have an automatic review prompt, you can submit a review in that prompt or save it for later. If you save the review prompt, a notification message will appear on your TRAIN home page about the pending review.


Note: Keep in mind that course reviews should be directed to the course provider and should focus on the course content. Comments about TRAIN and the TRAIN system are no appropriate for course reviews.

TO POST A COURSE REVIEW:

1. Login to your TRAIN account
2. Located the appropriate course in TRAIN
3. Select the **Reviews** tab on the Course Details page
4. Click the **Add** review button.
5. Fill out the review form as completely and accurately as possible. Please include a rating, title and comment.
6. Lastly, click **Submit** to finalize the review. Or, use **Cancel** to go back to the previous page without saving your entry.

Assessments and Evaluations

TRAIN provides learners, course providers and administrators the option to add and take assessments and evaluations with their courses. Assessments and evaluations are



My Action Items	
Item Name	Number of pending items
Assessments	1

My Learning

My Certificates

similar; however, with an evaluation, there is no right or wrong answer. On an assessment your answers will be scored and you will receive a final percentage or points based score for the assessment.

Note: as you are accessing your assessment (pre or post) or evaluation, there will be onscreen instructions for launching the specific assessment or evaluation. There will be additional onscreen instructions within the assessment or evaluation on how to move through the process and how to answer each question. Simply follow these onscreen commands and taking the assessment or evaluation should be a breeze!

Launching Assessments

TO LAUNCH AN ASSESSMENT, YOU HAVE A VARIETY OF ACCESS POINTS:

- On the **Course Details** page, where you originally registered for the course, under the **Registration** tab, there will be an assessment button.
- If you click the **My Learning** link on the TRAIN Home page Dashboard, you will see which recent courses have assessments that need to be completed.
- On the TRAIN Home page, if you have an assessment pending, a red alert notice will appear within the My Action Items section of the TRAIN dashboard.

Pre-Assessments

Pre-Assessments are always mandatory. You cannot proceed with the remainder of the course without first completing the pre-assessment. Please see above for steps to launch an assessment.

Post-Assessments

Post assessments are often mandatory, but not always. If a post-assessment exists, chances are you will need to complete and pass the post assessment before receiving a certificate for the course. Please see above for steps to launch an assessment

Time Limits

Some Assessments, both pre and post, have time limits. This is the total amount of time you can spend to answer all questions in the assessment. If you fail to complete an assessment in the allotted timeframe, your answers will be submitted as is and incomplete answers will be scored as incorrect. Please keep in mind, that assessment time restrictions are always added by the third party course provider. If you have questions about these limits or want to request special accommodation, please contact the listed course contact or Course Provider.

Attempt Limits

Similar to the time limits, TRAIN also has an option to impose attempt limits on both pre and post assessments. An attempt limit is the number of times an assessment can be *completed and failed*. If the user reaches the attempts limit and does not pass the assessment, their only option to retake the assessment is to reregister for the course.

Launching Evaluations

TO LAUNCH AN EVALUATION, YOU HAVE A VARIETY OF ACCESS POINTS:

- On the **Course Details** page, where you originally registered for the course, under the **Registration** tab, there will be an evaluation button.
- If you click the **My Learning** link on the TRAIN Home page dashboard, you will see which recent courses have evaluations that need to be completed.
- On the TRAIN Home page, if you have an evaluation pending, a red alert notice will appear within the My Action items section of the TRAIN dashboard.

Evaluations function almost identically to assessments. However, evaluations only appear after a course. There are no “pre-evaluations” as there are pre-assessments. Just list assessments, evaluations will provide on screen instructions and a set of intuitive navigation buttons to progress through the evaluation.

Competency Assessments

Recently, access to the Core Competencies for Public Health Professionals (Core Competencies) assessment has been added to the TRAIN website. Here, users can both gain access to and upload their completed assessments. The uploaded competency assessments will be saved in the user’s **My Learning** section for future reference. To upload a completed competency document, simply navigate to the **Competency Assessment** tab and upload the file where prompted.

TRAIN Surveys

TRAIN Surveys are designed to gather input on a wide range of topics. You may find the option to participate in a survey on your TRAIN Home page. Surveys are not mandatory, and it is your choice if you wish to take and complete a survey.

Survey Dashboard

The Survey Dashboard is available on the TRAIN Home page and displays all surveys that are either newly available to you or those that require some sort of interaction on your part. If you wish to participate in a survey click the **Launch Survey** link. If you do not wish to participate, and want to remove it from your Dashboard, click the **Decline** link.

When a new survey becomes available in TRAIN, a popup alert will notify you of the survey upon your next login. Once you acknowledge the new survey by closing the pop-up window you will not be notified again.

All surveys and related survey data can be more thoroughly reviewed and managed in the new **My Surveys** module within TRAIN Home page dashboard.

My Surveys

Similar to My Learning, **My Surveys** (in the *Dashboard* section of the TRAIN Home page) contains all survey data related to your account. This includes surveys that are available for you to take, surveys that you have started taking but have not yet completed, completed surveys (saved for archival purposes), and other statuses.

By default when you enter My Surveys you will view *all* survey data. You can use the radio buttons at the top of the page to filter this list and more easily find specific surveys.

The following is a list of all available filtering options and exactly what type of surveys they will display:

1. **All** – every survey, regardless of its status.
2. **Available: Not Started** – these are surveys that are available for you to take, but that you have not launched or started. If you remove a survey from the dashboard and you later decide that you wish to take the survey, you can find that survey here (provided it is still available).
3. **In Progress** – these are surveys you have started but have not yet finished.
4. **Pending Review** – these are surveys that you have completed but are awaiting review from another TRAIN user (see the section Surveys with Review below for additional information).

5. **Reviewed** – these are surveys that have been reviewed by another user in TRAIN, and require you to view the results of each question (see the section Surveys with Review below for additional information).
6. **Completed** – these are surveys that have been completed, meaning every requirement has been met. For surveys that require a review, it means that both the review and your analysis of the review have all been completed (see the section Surveys with Review below for additional information).
7. **To Review** – It is possible that another TRAIN user could select you to review their survey. If this happens, any survey that is awaiting your review can be found here (see the section Surveys with Review below for additional information).
8. **My Reviews** – If you have reviewed a survey in TRAIN, that survey is stored in the “My Surveys” module. This means that you can always return to a completed survey and review the submitted answers. All surveys that you have reviewed for other users can be found here (see the section Surveys with Review below for additional information).

In addition to the filtering options for display, the page will also display information related to each survey, tabled out in an easy-to-read format. For each survey you will see:

1. **Print** – no title is provided in this column, but you can click on the printer icon here to get a PDF document of the survey. **Note:** This option is only available if the survey manager has turned on the print function.
2. **Survey Name** – this will show you the name of the survey as defined by the survey manager. **Note:** This column will also display any links for interacting with the survey, such as **Launch Survey**.
3. **Start Date** – this will display the day you began working on a survey. For surveys that you have not started the date column will show “N/A.”
4. **Submitted Date** – this date is related only to surveys that require a peer review (see details in the section Surveys with Review below) and will display the date you submitted your survey results to TRAIN for review by another TRAIN user.
5. **Reviewed Date** – another date related to the review process, this date will display the date that the peer review was completed and returned to you.
6. **Submitted By** – when reviewing another user’s survey, this will display the TRAIN User Name of the user who requested you for their review.
7. **Status** – this is the TRAIN status for the survey, which corresponds to the filtering options defined above (In Progress, Not Started, Completed, etc.)

While the Dashboard is provided to you in order to make interaction with surveys easy and accessible, the My Survey module can be used for any action you might wish to take on a survey.

Taking a Survey

When you do choose to take a survey, click the **Launch Survey** link either in the Dashboard or My Surveys and TRAIN will launch the survey in new window.

Below are a list of possible options, features, and elements of surveys that you could experience in surveys offered through TRAIN. Note that some features may not be available depending on how the survey was set up.

1. **Introduction Page** – the first page of the survey will always show you some basic introductory text. This text will be different for every survey.
2. **User-Type Selection** – some surveys might ask you to make a selection that more accurately defines you as a “user.” If the second page directs you to make a User Type selection, the Survey Manager should provide onscreen instructions as to how they expect you to make your selection and/or why the selection has been added.
3. **Survey Section Navigation** – some surveys might offer “quick links” to different sections within the survey. If this option is turned on, the third page of the survey will show you a list of all sections built into the survey. Click any section title to “jump” directly to that section
4. **Survey Section Title Page** – surveys that are organized into sections can also display a “title” page for each section. This page provides additional information specific to the questions within that section. This is not required, so it is possible to take a survey where no sections are defined.
5. **Navigation** – the following buttons each have a unique function within a survey. Remember, not every button is “turned on” for every survey:
 - a. **Navigation** – If this is enabled, you will see this button at the top-left of the survey window. This button allows you to roll over and see a list of sections within the survey. Rolling down over the sections will expand to show you a list of the questions within the survey. If this feature is available, clicking on a Section Title or Question will take you directly to that page within the survey.
 - b. **Exit** – this button will save your progress and leave the survey.
 - c. **Print** – this button brings up a PDF document of the survey that can more easily be printed.
 - d. **Help** – this button will open a document provided by the Survey Manager containing relevant help information
 - e. **“?” button** – the question mark here means that this button’s functionality, if turned on, is determined by the Survey Manager. It might be a button that says “Email Feedback” that links you to an email or another function. It is completely up to the Survey Manager what the button says and does.

- f. “<<” **button** – if you are taking a very long survey, and are allowed to “skip” from question to question, it can be hard to find questions you still need to complete. This button will take you to the “previous” unanswered question.
 - g. “<” **button** – this button will take you back one page in the survey
 - h. “>” **button** – this button will take you forward one page in the survey
 - i. “>>” **button** – if you are taking a very long survey, and are allowed to “skip” from question to question, it can be hard to find questions you still need to complete. This button will take you to the “next” unanswered question.
6. Other items to be aware of:
- a. Some surveys will allow you to skip from question to question. Others might require you to answer every question in a defined order.
 - b. Some surveys allow you to submit incomplete results, while others do not. For surveys that require an answer on every question, automatic reminders will appear and will list all questions that were skipped. Clicking a question in this list will take you directly to that question.

Surveys with Review

TRAIN also has a unique type of survey that provides a peer-review experience for every TRAIN user that takes the survey.

THE BASIC STEPS FOR COMPLETING A SURVEY WITH REVIEW:

1. As a user, *you* choose to participate or not. If you want to participate, click **Launch Survey**, answer every question and submit your survey for review.
2. Once you have submitted your survey you **MUST** choose another user in TRAIN to review your survey. If you do not know another TRAIN user, that’s okay – many affiliates will provide a list of recommended or approved Survey Reviewers who can review your survey.
3. Specific steps for this process are provided below, after this basic steps list.
4. Once you have chosen a reviewer, they will need to “accept” your request and perform their review.
5. Once the reviewer has reviewed your survey and provided feedback, they will then return the survey to you.
6. You then need to open the survey, review their comments, and acknowledge that you have completely reviewed their comments.
7. Once all these steps have been finished, the survey is Complete and no further action is necessary. A copy of the survey (read-only) will remain in My Surveys as a *completed* survey AND in the selected reviewer’s My Surveys as a survey under *My Reviews*.

Selecting a Reviewer

When taking a survey with a review, you will need to select a reviewer. The review will then parse your responses and provide their own comments.

TO SELECT A REVIEWER:

1. Once you submit your initial survey results, the survey module will provide an option to select your reviewer immediately or to wait and select a reviewer later.
2. If you choose to select a reviewer later, the survey will remain in your Survey Dashboard until you have made a selection. This helps prevent “forgotten” surveys.
3. Once you are ready to select a reviewer, click the **Select Reviewer** link under the survey title. This will take you to a new page with a basic user search. There are two options for finding another user:
 - a. **Search all Users** – this allows you to search for any other account in TRAIN and ask the user to review your survey. In order to protect other TRAIN accounts, you can only search by the following fields:
 - i. Last Name
 - ii. First Name
 - iii. Organization
 - iv. Department
 - v. State
 - b. **View Approved Survey Reviewers** – as mentioned above, affiliates have the option of designating certain TRAIN users as approved or suggested Survey Reviewers. These individuals have been given a specific administrative role within TRAIN and they expect a larger number of requests to review other user’s surveys.
4. To search for users, first select the radio button corresponding to the desired search option (**All** or **Approved**), fill in any additional information you might know about the user you are looking for, and click the **Search** button. The page will refresh and a list of all users matching your search parameters will be displayed.
5. To select a user, click the button next to the user’s name and click **Select as Reviewer**.
Note: If you don’t see the user you were looking for, alter your parameters and click the **Search** button again to refresh the list.
Note: Even if you don’t find the desired reviewer on the first search, you must still select someone to review your survey. This is a mandatory step for surveys that require a review.
6. If you have accidentally selected the wrong reviewer, or mistaken one TRAIN account for another, don’t worry – that user will be able to **Decline** the request and you can pick a new reviewer.

Note: A selected reviewer has the right to decline any request. If a survey is declined by your selected reviewer, you will be asked to select another reviewer.

Reviewing a Survey

If you do accept the responsibility for reviewing another TRAIN user's survey you must take your role seriously and provide valuable feedback to the user in a timely manner. If you have questions about a specific survey, please contact your TRAIN affiliate administrator or the survey creator.

TO PERFORM YOUR DUTIES AS A SURVEY REVIEWER:

1. First click the **Accept** link within the Survey Dashboard to let the user know you agree to perform the review.
 - a. As mentioned above, you have the option of clicking the **Decline** button and returning the survey to the user.
 - b. If you are unsure who the user is, click on their TRAIN User Name under the Survey Title. This will display a limited list of user-details to protect user privacy. If you feel the user has selected you by mistake you can click the **Decline** button and return the survey to the user.
2. Once accepted, click the **Review Survey** button to launch the survey in a new window.
3. Reviewing a survey consists of the same steps, interface, and options as mentioned above for Taking a Survey, with the following exceptions:
 - a. The first page should display Introductory Text specific to you, the reviewer. This text is created for each survey by the Survey Manager, so it will be different for each survey. **Note:** the text here will be *different* from what the original user saw when taking the survey. Be sure to read the text carefully.
 - b. Each question has to two "modes" of view. The first mode is labeled as **My Answer** – this is the question that YOU, as the reviewer, are to answer.
 - c. You can flip to see the user's original answer by changing the view mode to **Original Answer**. Clicking this tab will flip the contents of the screen so you can see, in read-only mode, the user's original answer.
 - d. Based on the user's answer, their comments (if collected) and what you potentially know about the user, you are expected to answer the question as well.
 - e. Specific considerations, instructions, and expectations, from the Survey Manager, on this review process, should be provided to you by the Survey Manager. If you have questions, look for contact information within the provided **Help** information.

- f. At the end of the survey you will also have a page to submit a **Final Review**. Here, you can summarize your thoughts and provide any insight or explanation as to how you answered the questions in the review.
 - g. The summation of your answers, comments, and final review should provide enough valuable feedback to the user to be considered an effective “Review.” Again, the Survey Manager should provide you more specific instructions and explanation when taking the survey.
4. Once you have answered every question and entered your Final Review, click **Complete Review** to finalize your part in the review process. This returns the survey to the original user so they can review your submission.

Note: TRAIN will always keep a copy of this survey in your My Surveys → My Reviews section so that you can always look at surveys you previously reviewed for other users.

Looking at a Reviewed Survey

Once the selected reviewer has completed their review of your survey and submitted the feedback to TRAIN, the survey returns to your Survey Dashboard, as well as My Surveys → Reviewed. You must open the survey and look at every page of the review to complete the survey.

TO LOOK AT THE REVIEW COMMENTS AND COMPLETE THE SURVEY:

1. To look over the review, click the **Show Review Results** link within the Survey Dashboard (or from within My Surveys). This will, once more, open the survey in a new window.
2. The first page of Introductory Text will now be updated with new content. This content is, again, up to the Survey Manager to define. They should provide you with some basic instructions or expectations on how to interpret the review. If you have questions about these instructions, please contact your TRAIN state administrator or the survey creator.
3. Each question has to two “modes” of view. The first mode is labeled as **My Answer**. Displayed here, are the responses YOU provided, when first taking the survey.
4. To see what comments the reviewer has added, change the view mode to **Reviewer’s Answer**. Clicking this tab will flip the contents of the screen so you can see, in read-only mode, the reviewer’s response.
5. At the end of the survey, you will be able to read the reviewer’s **Final Review**. These comments should be a summary of their thoughts and provide insight or explanation as to how they answered the questions throughout the review process.

Note: The summation of both your and the reviewer’s answers, comments, and final review should provide enough valuable feedback to be considered an effective “Review”. Again, the

Survey Manager should provide you more specific instructions and explanation when taking the survey.

6. Once you have finished looking at every question and the Final Review, you can click **Complete Review** to finalize the review process.

Note: TRAIN will always keep a copy of all completed survey in your My Surveys → Completed, section.

Discussions and Other Resources

In addition to learning material and course links, TRAIN provides a handful of other useful learning tools. These include everything from user participation discussion boards and various resource sets to event calendars and item “spotlights”. These sections are important to TRAIN and knowing how and when to use them can help raise the benefits of managing your learning through TRAIN.

Discussion Boards

Discussion Boards allow users and administrators to hold discussions about relevant topics on TRAIN. The intention here is to spark conversation amongst the TRAIN community.

TO ACCESS AND POST TO A DISCUSSION BOARD:

1. Login to your TRAIN account and access the **Discussion Board** top level navigation tab.
2. Select the appropriate discussion topic from the list menu on the left.
3. To read replays from an existing thread, click the plus symbol (+) next to the thread. This will expand the thread and will show all replies. To read a reply, simply click on the title of that reply
Note: When reading a reply, you can move between replies of the same thread using the forward (>) and back (<) buttons at the top of the reply interface.
4. To leave a reply of your own, after you have selected the appropriate discussion topic from the list menu, click on the title of the thread to which you would like to reply.
5. Then, at the bottom of the thread screen, click the **Reply** button.
6. Create a **Title** for your reply or use the default title (taken from the original thread title)
7. Create the **Body** of your reply (this is the actual content of your message)
8. Click **Submit**. Your reply will now appear in the thread!



Note: Be sure to check the discussion boards often for new topics, threads and replies. Discussions are a great way to learn about other users, topics, courses and opportunities within TRAIN.

Resources

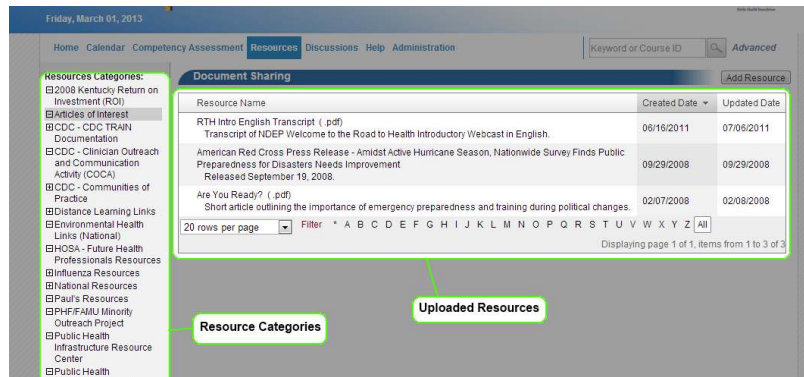
The TRAIN resources section is a compilation of uploaded resource documents (PDFs, Power Point and Word files, etc.) and links to online information. Often, TRAIN administrators will use the resources section to post additional course materials or expanded learning opportunity content. Similar to discussions, resources are broken into *categories*. Although the TRAIN resources are typically managed

by the TRAIN state administrators, you, as an end user, do have the option to upload your own resources. However, these items will be subject to *approval* from a higher level administrator.

TO ACCESS AND POST RESOURCES:

1. Login to your TRAIN account and access the **Resources** top level navigation tab.
2. Select the appropriate resource category
3. To view a resource, click on the name of the appropriate resource

Note: If the resource is an online link, you will be redirected out of the TRAIN site, to the external resource. If the resource is an uploaded file, you will be prompted to download the file to your local drive.



4. As a TRAIN user, you can also add your own resources.
5. To do so, once you have selected the appropriate resource category (if you have questions about which category is best to upload your resource to, please contact your TRAIN state administrator), click the **Add Resource** button in the top right of the page.
6. If the resource is an uploaded document, follow the onscreen instructions to upload your file.
7. If the resource is a web link, change the radio button below to **Browse to URL** and provide the http web address of the resource
8. Create a **Name** for your resource.
9. Create a **Description** for your resource.
10. You can also adjust the assigned document category using the **Category** dropdown menu at the top of the page.
11. Lastly, click **Save**. This will submit your resource for approval.
12. You will receive email notification about the submitted resources. You will receive further email notices if your resource is approved or declined. Once approved, your resource becomes available to other TRAIN users.

Spotlight Links

On the TRAIN Home page, in the dashboard, there is a section for Spotlight links as well as your own. Spotlight links are provided by the affiliate administrators. You can also add your own links to this section.


Upcoming Events

Within TRAIN, administrators and Course Providers can setup both online and live event courses. For live event courses, because they take place at a physical location at a specific date and time, users need to be aware of the latest session schedules. Enter the **Upcoming Events** portion of the TRAIN Home page. On the TRAIN Home page, as the first announcement shown, there is a section called **Upcoming Events**. This section will display sessions that are scheduled for the near future. It is entirely up to the Course Provider if they want to display their sessions here. If you have questions about the sessions displayed here, please contact your TRAIN state administrator.

Event Calendar

Important: The Event Calendar is not available to all users from all states. States must subscribe to the event calendar individually. If you are interested in bringing the Event Calendar to your state, please contact your TRAIN state administrator.

Similar to Upcoming Events, the **Calendar** is a good way to get a quick overview of all publicly available upcoming sessions. This feature is available via the **Calendar** (for Kentucky users, this is called **Monthly Calendar**) link in the TRAIN navigation bar. To access course and session information within the Calendar, simply click on the asset title in the calendar display.

You can also print a list of courses for a given month. The **Print icon** () is located above both the month and date views of the Calendar. Clicking the print icon will reveal a popup window in which the user can refine their date range using the standard date selection boxes. The print friendly calendar will not display as a calendar for printing purposes; rather, it will list the events by date.

Support and Troubleshooting

If you have questions about TRAIN, please contact your TRAIN state administrators.

Contacts

To see a full list of contacts, login to your TRAIN account and access the **Help** tab. From there, click on the **Contacts** link.

Environment Tester

If you are experiencing technical issues with TRAIN, we recommend your first try the TRAIN environment tester. This function will test your computer for TRAIN compatibility (keep in mind that 3rd party course content may have different compatibility requirements).

To access the TRAIN environment tester, you do not need to be logged in to your TRAIN account. Simply access the **Help** tab on the top level navigation and then click the **Test Your Environment** link. This will run a series of tests on your browser. Any tests that come back failed, with a red X icon, indicate areas you may need to change to be fully compatible with TRAIN. Click on the name of the failed test for additional instructions.

Forgotten Passwords

If you forget your password, click the **Forgot your Password?** link on the TRAIN Home page and follow the onscreen instructions.




You will be asked to enter your email address and TRAIN will send an email with your login credentials. If your email address exists on more than one account in TRAIN, you will need to contact your affiliate administrator. You do not need to be opted into TRAIN emails to receive the forgotten password emails.



Evaluations and Assessments

State Administrators, Course Providers and users with the Evaluation or Assessment Manager role are able to create Assessments and Evaluations for courses on TRAIN, regardless of the Course Format. Pre-Assessments are given to users as the first step in registration and must be completed before the user's registration moves to **In Progress**. Post-Assessments are given to users after they have completed a course and must be completed before the course will be marked as **Completed** and moved into their transcript. Evaluations are given after any post-assessment has been completed, and can be set as either mandatory or not-mandatory. Assessments have quantifiable questions that are graded for a pass/fail result, while Evaluations are completely subjective and are not graded in any way.

Creating, Editing, and Assigning Assessments

Many admins will wish to add graded Assessments to their courses, to test user comprehension of the course material. To create a new Assessment, or to edit an existing Assessment, admins should follow these steps:

1. Using the course search interface, find the course which will be receiving the Assessment.
2. Click on the  Edit icon to the left of the course name to enter the Course Edit interface, then click Assessments in the left hand menu. Alternatively, click the  Assessment icon in the course search interface to jump directly to the Assessments page.
3. Click the "Assign Assessment" button to bring up the Assessment interface, or click the  Delete icon to remove its corresponding entry from the Course.

From there, admins can delete Assessments by clicking on their  Delete icon, assign an existing Assessment to the course, or create a new Assessment. To create a new Assessment, click on the "Add New Assessment" button. To edit an existing Assessment, locate the desired Assessment in the list, then click the  Edit icon. Either of these actions will bring up the Edit Assessment interface. From there:




1. The *Attributes* tab allows the admin to specify starting information for the Assessment. Note that only the Assessment name and Min passing score fields are required, although admins may wish to specify additional information here.
2. Admins can change the text which will be displayed at the start and end of the Assessment via the *Introductory text* and *Final page text* tabs. Changing this text is purely optional.
3. The *Assigned* tab shows all courses and conferences which currently share the Assessment. When creating a new Assessment, no courses or conferences will be listed. Assessments can be assigned to multiple Courses and conferences without conflict.
4. The *Visibility* tab allows admins to specify which groups should have access to the Assessment for their own courses. Note that this does not force the group to use the Assessment. However,


this allows the Assessment to be accessed, edited, and assigned by other Admins to other courses.


5. Lastly, in the *Questions* tab, admins can create questions to be associated with the Assessment.
6. Once all the necessary and desired information has been entered, click the Save button to save the Assessment. If the Assessment is not yet active, the admin will be prompted to activate it. Inactive assessments will never be seen by users, but can still be edited by the admin.
7. Locate the desired Assessment in the list, and click the Assign button to assign it to the current course.
8. Select which groups should see this Assessment for the current course. This controls which users will encounter the Assessment as part of the course.
9. Select the Credit Types which should see this Assessment. Many courses will only have one credit type.
10. Select which type of Assessment is appropriate for the selected course.
 - **Pre-assessment** – The Assessment will be displayed before the course content.
 - **Post-assessment** – The Assessment will be displayed after the course content.
 - **Post-assessment practice** – The Assessment will be displayed after the course, and the score will not be recorded.
11. Select Auto Verify if completion of the Assessment indicates full completion of the course. If users should wait for an admin to manually verify completion of the course, uncheck this box.
12. Click Save. The Assessment is now assigned to the specified Course for the specified Group(s). Note that this change is saved as soon as the Course Edit Wizard reloads. Clicking the Cancel button in the Course Edit Wizard will not remove the Assessment.

Creating Editing and Assigning Evaluations

Admins may wish to add feedback Evaluation questionnaires to their courses, to measure user opinion regarding the effectiveness of the course. To create a new Evaluation, or to edit an existing Evaluation, admins should follow these steps:

1. Using the course search interface, find the course which will be receiving the Evaluation.
2. Click on the  Edit icon to the left of the course name to enter the Course Edit interface, then click Evaluations in the left hand menu. Alternatively, click the  Evaluation icon in the course search interface to jump directly to the Evaluations page.
3. Click the “Assign Evaluation” button to bring up the Evaluation interface, or click the  Delete icon to remove its corresponding entry from the Course.

From there, admins can delete Evaluations by clicking on their  Delete icon, assign an existing Evaluation to the course, or create a new Evaluation. To create a new Evaluation, click on the “Add New

Evaluation” button. To edit an existing Evaluation, locate the desired Evaluation in the list, then click the  Edit icon. Either of these actions will bring up the Edit Evaluation interface. From there:

1. The *Common* tab allows the admin to specify starting information for the Evaluation. Note that only the Evaluation name is required, although admins may wish to specify additional information here.
2. Admins can change the text which will be displayed at the start and end of the Evaluation via the *Introductory text* and *Final page* tabs. Changing this text is purely optional.
3. The *Assigned* tab shows all courses and conferences which currently share the Evaluation. When creating a new Evaluation, no courses or conferences will be listed. Evaluations can be assigned to multiple Courses and conferences without conflict.
4. The *Visibility* tab allows admins to specify which groups should have access to the Evaluation for their own courses. Note that this does not force the group to use the Evaluation. However, this allows the Evaluation to be accessed, edited, and assigned by other Admins to other courses.
5. Lastly, in the *Questions* tab, admins can create questions to be associated with the Evaluation.
6. Once all the necessary and desired information has been entered, click the Save button to save the Evaluation. If the Evaluation is not yet active, the admin will be prompted to activate it. Inactive Evaluations will never be seen by users, but can still be edited by the admin.
7. Locate the desired Evaluation in the list, and click the Assign button to assign it to the current course.
8. Select which groups should see this Evaluation for the current course. This controls which users will encounter the Evaluation as part of the course.
9. Select the Credit Types which should see this Evaluation. Many courses will only have one credit type.
10. Click Save. The Evaluation is now assigned to the specified Course for the specified Group(s). Note that this change is saved as soon as the Course Edit Wizard reloads. Clicking the Cancel button in the Course Edit Wizard will not remove the Evaluation.

Follow Up Evaluations

In the process of assigning an evaluation to a course, you have the option of using an **Initial Evaluation** or a **Follow Up Evaluation**.

If you select the **Initial Evaluation** option, the evaluation is delivered to the user immediately after they complete course and/or any assigned assessments.

If you select the **Follow Up Evaluation** option, you will also need to provide a “days” value. TRAIN will then, after the defined number of days, present the evaluation to the user in their pending notifications on the TRAIN Home page.





Both evaluation types can be assigned to specific credit types.



Both Evaluation Types also include an availability “days” value. This value defines the number of days, after the user completes the course, that they will have to also complete the evaluation

Note: Evaluations that have a limited window of availability cannot be made mandatory.

Creating and Editing Questions for Evaluations or Assessments

Admins will frequently want to update existing Evaluations and Assessments, or add new questions to newly created Evaluations and Assessments. To create a new Question, or to edit an existing Question, admins should follow these steps:

1. Using the course search interface, find the course which will be receiving the Evaluation.
2. Click on the  Edit icon to the left of the course name to enter the Course Edit interface, then click Evaluations or Assessments in the left hand menu. Alternatively, click the  Evaluation icon, or the  Assessment icon in the course search interface to jump directly to their respective page.
3. Click the “Assign Evaluation” or “Assign Assessment” button to bring up the appropriate interface.
4. Click the  Edit icon next to the Evaluation or Assessment to be modified.
5. Click on the *Questions* tab.

From there, existing questions can be modified using the  Edit icon next to the appropriate question, or removed using the  Delete icon. New questions can be added by clicking on the “Add Question” button. Editing or adding a Question will bring up the Question editing interface.

6. If this is a new question being created, the first step is to specify the Question Type. The selected type will determine what options are available in the editing interface.
7. The *Common* tab allows the admin to specify the basic information of the Question. The text of the question must always be specified, regardless of type. Assessment Questions must also have a specified point value, although this value can be zero (at the admin’s discretion).
8. Some Question types will not have a second tab. In these Question types, the response options are specified on the *Common* tab. In Assessment Questions, this will include the option of setting a correct answer, if there is one.
9. Other Question types will have a second tab. The title of this tab will vary depending on the Question type, but the functionality is largely the same. The second tab is where the secondary information, such as Multiple Choice options, or captioning text for a rating scale, are defined.
10. Once all the required information is entered click “Save” to save the details of the Question. Note that all changes made here are saved at this point. Once the Question is saved, clicking “Cancel” in the Edit Assessment or Edit Evaluation interface will not remove the question or undo any changes saved to the question.

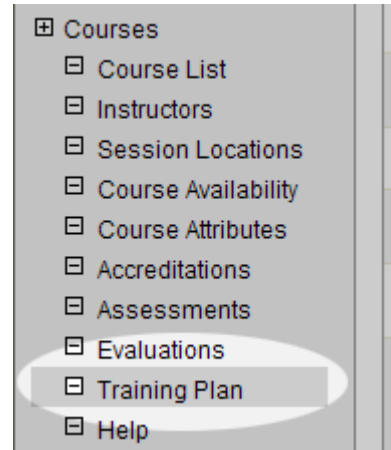
Master Training Plan

Finding Master Training Plan

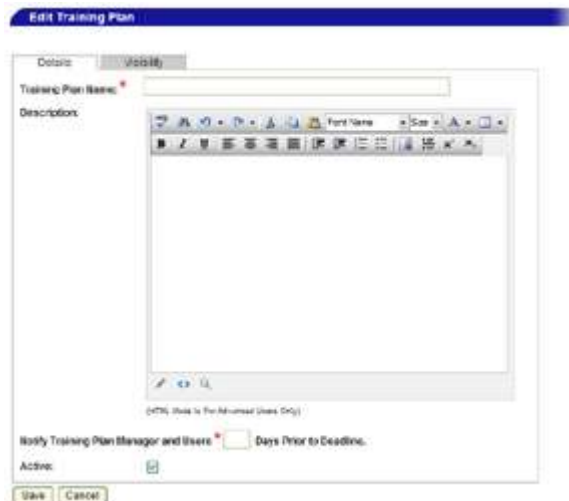
The Master Training Plan module allows administrators to set up recommended or required sets of courses (“Training Plans”) and monitor user progress through each plan.

In order to use the Master Training Plan:

1. Go to **Administration, Courses, Training Plan**.
2. By default the Training Plan page will display a list of all Training Plans that are available to you based on your Training Plan Manager role.
 - a. ✕ Clicking the ‘x’ icon for any Training Plan will delete the plan.
 - b. ✎ Clicking the pencil icon will take you to the Training Plan page. This is where you define name and description of the Plan as well as set visibility for the report (who can see/run the report). You can also edit the Notify date.





“Notify Training Plan Manager and Users ____ Days Prior to Deadline.” This option sends out e-mail notification to all users registered for the Training Plan a certain number of days before the deadline. Each user can have a different deadline for the Plan.



- c. 📄 Clicking this icon will take you to the **Assign Users** page. This is where you manually register/assign users to the Training Plan as well as access each users Training Plan list

in order to monitor progress. From this list you can also remove users from the Training Plan and mass e-mail any user(s) in the plan.

- d.  Clicking this icon will take you to the **Edit Training Plan Components** page. This is where you can create sections and add courses to the plan.
- e.  Clicking this icon will create a clone of the selected Training Plan and will show you the administrator interface for editing the details of the newly cloned Training Plan.
- f. Cloned Training Plans will copy all details of the original Training Plan, *except* the following:
 - i. Users assigned to the Training Plan (i.e., users assigned to the original Training Plan will *not* be assigned to the cloned version)
 - ii. Published Status (all cloned Training Plans will default to an *unpublished* status, regardless of the publish status of the parent Training Plan)


Adding a New Training Plan

To add a new plan:



1. From the Training Plan page, click the **Add** button, located at the bottom-left corner of the list.
2. On the **Details** tab, enter a report Name, a Description of the training plan, and define the number of days prior to each user's deadline that a reminder notification should be sent.
3. Click the **Visibility** tab to define who will be able to see/run your report. Select the appropriate group for visibility – Training Plans can be assigned to any sub-group.
4. Once you have the Details and the Visibility tabs filled out, click **Save** to return to the Training Plan list.

Editing Training Plan Components

Training Plans are built by adding groups and subgroups (all called Sections) and then tying courses to these sections. To design your Training Plan components:

1. Click the **Relationship**  icon from the Training Plan page.
2. To add sections:
 - a. Highlight a section and click **Add Section** to add a sub-group to the selection.
 - b. Enter the name of the new section.
 - c. Continue as necessary until the structure is complete.
 - d. When adding sections, you also have the option to require users to complete the sections in the defined order. This option will appear as a set of radio buttons at the top of the sections/course list: 'All sections must be completed in order' or 'Sections can be completed in any order'.
 - e. Also when adding sections, you will have the option to define what/how many courses from the section the user must complete: 'Learner is required to take only one course out

of this section of courses'; 'Learner is required to take n courses' (in which case you will define n and this is the number of courses, from the section, that the user must complete); 'Learner is required to take ALL courses out of this section'; 'Learner is required to take "checked" courses only (as selected in main design window)'.

- f. This information will be displayed for users in their 'My Training Plan' interface.
3. To add courses:
 - a. Highlight a section and click **Add Course**.
 - b. Select if a New Course is to be added or if an Existing Course is to be added.
 - c. If **New Courses** is selected the Course Wizard will be displayed. Enter all course information as normal and save the course. The course will be added to the Training Plan once it has been saved.
 - d. If **Add Existing Course** is selected, search for the Course(s) via the Keyword search by entering the keyword and clicking **Search**. You are also able to search for specific courses using the Course ID.
 - e. Place a check next to the name of the courses in the resulting course list and click **Link Selected Courses**.
 - f. These courses will now be displayed under the selection to which they are assigned. If the course needs to be **required** place a check in the box next to the Course Name.
4. To edit a section highlight the section name and click the pencil  icon.
 - a. If you click to highlight a Course and then click the pencil  icon, it will take you to the Course Wizard to edit the course.

Note: anyone with the role of Training Plan Manager has the ability to edit course content.
5. To delete a section or a course, highlight the name of the section or course and click the blue 'x' icon.
6. When finished building the Component structure for the Training Plan click **Save and Back** to return to the Course Add/Edit module.

Assigning and Removing a Training Plan to Users

Once a Training Plan has been built it can be assigned to users who are then able to see the series in their "My Training Plan" and take the courses. Users can also search for Training Plans via the Course Search module.

Note: The creator of a Training Plan will be able to see *all* users assigned to that training plan, even if the assigned user is beyond the administrator's normal jurisdiction. This is only true for the *creator* of each Training Plan.

To assign a Training Plan to users:





1. From the Training Plan page click the Notebook  icon for the appropriate Training Plan.

2. The following page will display a list of users currently assigned to the Training Plan. If no users have been assigned the list will be blank. Click **Add More Users** to continue.
3. From the list of displayed users place a check next to the name of each user to be assigned to the Training Plan. Click the **Search For Users** radio button to find users via a search instead of paging through the list.
4. Once all desired users have been selected click **Add Selected Users**. You can automatically assign the same Completion Date to all selected users by entering the date in the **Set Completion Date to the selected users** text area.
5. To remove a user from Training Plan place a check next to the user's name in the **Assigned Users** table and click **Remove Selected Users**.
6. Once the all users have been assigned click **Back** to return to the Training Plan home page. The assigned users will now have access to all courses within their **My Training Plan** link in the **My Learning Record** box on the home page.

Tip: Training Plans can only be assigned to users who fall in the group or subgroups to which the Training Plan is assigned. If an admin has the Training Plan Manager role assigned at the *State* level, but the Training Plan itself is only available at the *County* level, only users at the *County* level or lower can be assigned to the Training Plan.

Viewing User Progress

Training Plan Administrators are able to monitor user progress through each Training Plan. To access each user's plan:

1. From the Training Plan page click the Notebook  icon for the appropriate Training Plan to go to the **Training Plan By Users** page.
2. From this page click the Relationship icon  for any user. This will take you to the **Training Plan by User** page. All user details regarding the plan are available on this page.
 - a. The Plan is broken down by Sections.
 - b. Each course is displayed by Name within the appropriate section and designated as **Required** or **Optional**.
 - c. For each course you can also view the format, the completion status, and the actual completion date.
3. Training plans with the  icon mean that the user was added to the plan by an administrator.
4. Training plans with the  icon mean that the user added themselves to the plan through the Course Search module.

















- Administrators can also view all training plans assigned to the user by clicking the user's Login Name from the **Training Plan by Users** page.

Published and Unpublished Training Plans

Training plans also have a “published” status. This allows administrators to act as though the training plan is active, but it is not accessible to users – i.e., active to administrators; but inactive to users.

In the Training Plan Edit interface, there is a checkbox option to publish or un-publish a training plan. When creating a new training plan, be sure to set this value appropriately.

Within the administrator list of training plans, a column will indicate the published or un-published status of the training plan.

Training Plan		
Show: <input checked="" type="radio"/> All Training Plans <input type="radio"/> My Tra		
	Status	Name
   	Published	1A_Core (Personal)
   	Published	1B_Core (Personal)
   	Unpublished	2008 RS F Therese T
   	Published	2008-200 Inspector Training

Training Plan Summary Dashboard

When editing any Training Plan, training plan administrators now have the option to show the overall Training Plan progress details on a custom dashboard page. When a Training Plan is included on the dashboard page, it will show the percentage of users who are assigned to the training plan and that have also completed it.

To include a Training Plan on the custom dashboard page, edit the specific Training Plan and locate the tab called **Report Dashboard**.

You may also set two threshold values for “Low” and “High”. On the Training Plan Dashboard, if the percent of users who have completed the Training Plan is less than the “Low” value, the data will be displayed in red. If the percent of users who have complete the Training Plan is between the “Low” and “High” values, the data will be displayed in yellow. If the percent of users who have completed the Training Plan is above the “High” value, the data will be displayed in green. You may adjust the values for “Low” and “High” on a per Training Plan basis to suit your summary reporting needs.

Under the Report Dashboard settings, If you turn ON the option to **Include this Training Plan on my Report Dashboard**, the selected Training Plan will then appear on the following page as a percentage of users who have completed the Training Plan.

Training Plan Dashboard: <https://www.train.org/DesktopShell.aspx?tabId=195>


Custom Certificates

TRAIN offers administrators the ability to create their own certificates. Administrators can upload an image and place the needed text fields within that image to create the certificate. The certificate can then be assigned to courses and delivered to users via the “Certificates” link.

Accessing Custom Certificates

To access Custom Certificates, the administrator must have the *Course Certificate Manager* role assigned to their account.

TO ACCESS CUSTOM CERTIFICATES:

1. Login and select the **Administration** tab.
2. Select the **Courses** list menu item and then the **Certificates** sub list menu.
 - a. This will reveal the ‘Certificates’ interface. This interface consists of a ‘Certificate Type’ list and a ‘Show only my certificates’ checkbox filter.
 - b. The ‘Certificate Type’ list displays all certificates that are available to you according to your user roles and page filters.
 - c. The ‘Show only my certificates’ checkbox filter, if checked, limits the ‘Certificate Type’ list to only those certificates that you have created. If it is unchecked, you will have access to all public certificates as your user roles dictate. By default, this filter is checked.
3. The ‘Certificates’ interface also includes an **Add Certificate Type** button and, if there are existing certificates, an **Edit** icon ().

Creating a New Custom Certificate

Administrators can use these steps to create new Custom Certificates. These certificates can then be assigned to courses which users can print once they have completed the course. Assigning a Custom Certificate to a course takes place within the ‘Course Edit Wizard’ interface.

TO CREATE A NEW CUSTOM CERTIFICATE:

1. Access the ‘Certificates’ interface as described above.
2. Click the **Add Certificate Type** button.
 - A. This will reveal the ‘Edit Certificate’ interface. This interface has three tabs: **Details**, **Design**, and **Visibility**.
 - B. The ‘Edit Certificate’ interface also has three standard buttons: **Save**, **Save and Back**, and **Cancel**. At any time, you can click:

- I. The **Save** button to save your progress;
 - II. The **Save and Back** button to save your progress and return to the previous interface;
 - III. The **Cancel** button to return to the previous interface without saving your progress.
- C. When adding a new certificate, you must *first* provide all data for the **Visibility** and **Details** tabs before moving to the **Design** tab.
3. Select the **Visibility** tab. Here, you determine exactly who has access to the certificate.
- A. If the certificate should only be accessible for you the creator, select the 'Private Certificate' checkbox, then select a group from the grouping tree (most often, with a private certificate, it makes sense to select the highest possible group).
 - I. If you select this option, you will be the only administrator with access to this certificate for course assignment.
 - II. You will be able to assign the certificate to any course also assigned, or available to, the same groups and subgroups as the certificate (i.e., the certificate is available for all subgroups of the explicitly assigned group, as are courses).
 - B. If the certificate should be available to other administrators with the *Course Certificate Manager* role, use the grouping tree to limit the visibility of the certificate. For this option:
 - I. The certificate will be available for *course assignment* to all *Course Certificate Manager* administrators *below* the group assignment;
 - II. However, the certificate will be available for *edit* to all *Course Certificate Manager* administrators *above* the group assignment.
4. Select the **Details** tab:
- A. Enter a name for the certificate into the 'Certificate Name' field.
 - B. The 'Active' checkbox controls the overall availability of the certificate. If this box is not selected, the certificate will not be available to other administrators nor for assignment to any courses. By default, the 'Active' box is not selected. If you are creating a new certificate, leave this box unchecked until you have completed the new certificate; at which point you can edit the certificate and make it active.
 - C. The 'Uploaded Certificate Image' field lists what image the certificate is currently using. If you are creating a new certificate, this field will be blank until an image has been uploaded.
 - I. Once an image is uploaded, there will also be a **Delete** button. Selecting this button will remove the image you have uploaded from your certificate.

- D. The 'Upload New File' field lists the image that will be used for the certificate. A **Browse** button accompanies this field. When creating a new certificate, click the **Browse** button and select the appropriate image to use for the certificate from your local drive.
- E. If the certificate needs to have defined print margins, use the 'Top', 'Bottom', 'Left' and 'Right' fields to enter this information. This information is determined in pixels; therefore, list in pixels the desired width of each margin. This information is not required.

Note: at this point, it is a good idea to click the **Save** button. This will save the image you have browsed for and selected to upload; as well as save your other progress.

5. Select the **Design** tab:

- A. The data in the **Design** tab is the most complex part of certificate creation. When creating your certificate, it is important to remember that Custom Certificates can be assigned to multiple courses.
- B. When you first access the **Design** tab, your certificate image will not yet be displayed, this is intentional. However, there will be a 'Field Name' list available.
- C. *Fields* are similar to variables and the data for these fields is dynamic. You can add all fields to the certificate and you must add at least one. We will cover adding a field to the certificate shortly. First, more on the available certificate fields.
 - I. For example, if you add the 'Completion Date' field to the certificate: when a user completes a course with the certificate assigned, the 'Completion Date' field will become automatically populated with the completion date for that course registration.
 - II. If 'Course Location' is added to the certificate, that field will be populated with the session location information for whatever course the certificate is assigned to. Sometimes, depending on the course format, there will be no session location information to fill the 'Course Location' field. In these instances, the field will be left blank.
 - III. The 'Course Name' field will be populated with the name of the course to which the certificate is assigned (remember, certificate assignment takes place within the 'Course Edit Wizard'; and certificates can be assigned to multiple courses).
 - IV. The 'Credit' field will list any credits associated with the course to which the certificate is assigned. The 'Credit' field will display whatever credit is selected by the users upon registration. Certificates can only display one credit per certificate.
 - V. The 'Custom Text' field will pull data entered in the 'Course Edit Wizard'. Specifically, in the **Certificates** portion of the wizard, there is a 'Notes' field. This data is used to populate the 'Custom Text' field.

- VI. The 'Provider Name' field will populate based on data from the 'Course Edit Wizard'. Specifically, in the **Description** portion, the 'Sponsor/Offerer' field.
 - VII. The 'Session Dates' field will populate with the date of the session for which the user is signed up. If the certificate is assigned to a course that has no sessions, this field will be left blank.
 - VIII. The 'User Name' field populates with the name of the user who has received the certificate.
- D. To add a field to your certificate, click the **Add** button next to the appropriate field in the 'Field Name' list. Note that adding a field to the certificate, such as 'User Name', will only add a space for a user name, the phrase "User Name" will not appear on the certificate unless you have embedded it into your original certificate image.
- I. If this is the first field you have added your certificate, your certificate should now be visible below the 'Field Name' list.
 - II. You will also see two new buttons: **Update Preview** and **Print Preview**.
 - a. You can click the **Print Preview** button at anytime to create a PDF of your certificate as it currently is.
 - b. The **Update Preview** button will be used to update the 'Edit Certificate' interface after changes to fields have been made. We will cover this shortly.
 - III. By Default, the certificate displays with a grid super imposed upon it. This grid is to help create the certificate, it does not appear on the final certificate. It is possible to remove this grid using the 'Show Grid Lines' checkbox.
- E. Once you have added a field to the certificate, that field then becomes inactive in the 'Field Name' list. However, the field is then presented below the 'Field Name' list, but above the certificate image (each field will have its own set of parameters). For example, see the image on the next page.
- I. To remove a field after it has been added to the certificate, click the **Delete** button next to the field name in the field parameters.
 - II. Use the grid lines on the certificate preview to determine where on the certificate the fields should display. Think of these grid lines as coordinates.
 - III. Enter these grid coordinates into the 'Left' and 'Top' fields in the field parameters.

- IV. The 'Width' and 'Height' fields are also based on the grid coordinates; but only as a measurement of the size of the field, not as an indication of the location of the field.

In the example below, the 'Custom Text' field will be located 225 pixels from the top, and will be 14 pixels tall.

- V. The remaining field parameters include some standard text formatting parameters. You can set the 'Font' and font 'points'. You can also make the field 'Bold', 'Italic', 'Underlined' or 'Strikethrough' by selecting the appropriate field

The screenshot shows the 'Edit Certificate' interface with three tabs: 'Details', 'Design', and 'Visibility'. A tip at the top says: 'Click Add button to add field to the certificate.' Below this is a table with the following fields:

	Field Name
Add	Completion Date
Add	Course Location
Add	Course Name
Add	Credit
Add	Custom Text
Add	Provider Name
Add	Session Dates
Add	User Name

Below the table is the 'Custom Text' configuration panel with the following settings:

- Left: 250, Top: 225, Width: 100, Height: 14
- Font: Arial, 14 points
- Alignment: Left
- Formatting options: Bold, Italic, Underline, Strikethrough (all unchecked)

At the bottom is a 'Preview options' section with a checked 'Show grid lines' option and 'Update Preview' and 'Print Preview' buttons. Below this is a grid showing a certificate preview with the text 'Certificate of Completion' and 'Congratulations on completing a TRAIN course, we at KMIT salute you!'.

parameter checkboxes. The 'Alignment' parameter determines how the font will align within the field that has been created (this parameter is relative to the boundaries of the parameter field within the certificate, not the boundaries of the certificate itself).


- F. Once you have added a field to the certificate or after you have changed any of the field parameter values, click the **Update Preview** button. This will refresh the page and display your adjustments. Note that this will not save the changes you have made, it simply displays them for you.
- G. To save your progress, click the **Save** or **Save and Back** button. It is a good idea to save the certificate after each new parameter has been added and adjusted.
- H. Once all appropriate fields have been added to the certificate, click the **Save and Back** button to save your work and return to the previous interface

- I. Note that you can make additions and changes to the certificate even after users have received the certificate. These changes are reflected the next time the user access the certificate.

Editing an Existing Custom Certificate

Once a certificate has been created, even if users have already received the certificate, administrators can edit the certificate content and even replace the image. Changes like these will be effective the next time a user accesses the certificate from the 'Certificates' interface; even if that user has received the certificate before the changes were made.


TO EDIT AN EXISTING CUSTOM CERTIFICATE:

1. Access the 'Certificates' interface as described above.
2. Click the **Edit** icon () in row with the certificate you wish to edit
3. Make any needed changes to the **Details**, **Visibility** and **Design** tabs.
 - A. If you have created a certificate earlier, but left it inactive until the certificate is complete, check the 'Active' box now to make the certificate available for course assignment.
4. Click the **Save and Back** button to return to the previous interface. Click **Save** at any point to save your progress without returning to the previous interface. Click **Cancel** to return to the previous interface without saving your changes.

Removing an Existing Custom Certificate

It is not possible to delete a certificate. However, you can adjust the 'Active' status of the certificate or limit the visibility. Note that changing the 'Active' status or visibility of a certificate does not affect access to the certificate for users who have already received one.

TO DELETE AN EXISTING CUSTOM CERTIFICATE:

1. Access the 'Certificates' interface as described above.
2. Click the **Edit** icon () of the certificate you wish to edit
3. Select the **Details** tab.
4. Uncheck the 'Active' checkbox.
5. Click the **Save and Back** button to return to the previous interface. Click **Save** at any point to save your progress without returning to the previous interface. Click **Cancel** to return to the previous interface without saving your changes.

Assigning a Custom Certificate to a Course

Course providers will frequently wish to provide a printable certificate for their course, conference, or conference session. Through the certificate assignment interface, the course provider may:

- Assign a certificate to a course, conference, or conference session
- Assign separate certificates for different credit types within the same course, conference, or conference session
- Assign separate certificates depending on the user's completion date within the same course, conference, or conference session
- Update assignment settings for an existing certificate assignment
- Remove a certificate assignment

ACCESSING THE CERTIFICATE ASSIGNMENT INTERFACE FOR A COURSE

To access the certificate assignment interface for a course, first find the course in any course search, or through the Administration -> Courses -> Course List interface. From there, click the pencil icon to enter the Course Edit Wizard. Within the Course Edit Wizard, click the Certificates option in the menu at the left.

ACCESSING THE CERTIFICATE ASSIGNMENT INTERFACE FOR A CONFERENCE

To access the certificate assignment interface for a course, first find the conference through the Administration -> Courses -> Conferences interface. From there, click the pencil icon to enter the Conference Edit Wizard. Within the Course Edit Wizard, click the Conference Certificates option in the menu at the left.

ACCESSING THE CERTIFICATE ASSIGNMENT INTERFACE FOR A CONFERENCE SESSION

To access the certificate assignment interface for a conference session, first locate the conference through the Administration -> Courses -> Conferences interface. From there, click the clock icon to go directly to the Sessions for that conference, or click the pencil icon to enter the Conference Edit Wizard, then click the Sessions header under the Session Information option in the left-hand menu. In the sessions section of the Conference Edit Wizard, find the desired session, and click the pencil icon to edit the session. Click the Certificates tab at the top of the interface to access the certificate assignment interface.

USING THE INTERFACE

Once you have entered the Certificate interface, you are ready to assign certificates, update existing assignments, or remove unwanted assignments.

ASSIGNING A CERTIFICATE

To assign a certificate, click the Assign Certificate button to bring up the Certificate Details box. In this box, you may select one of the following Filters to determine what certificates are available for assignment:

- My certificates – This option will show only certificates created specifically by your account.
- All public certificates – This option will show all certificates which are marked as “public” by the party responsible for creating or maintaining the certificate.
- All Public and everyone’s private certificates – This option will show all certificates. Note that private certificates are often intentionally designed with specific regions or courses in mind. Before using someone else’s private certificate, it is advisable to consult with that person to confirm whether it would be appropriate for the content of your course, conference, or conference session.

Below the Filter option is the Certification Type drop down box. The specific options displayed in this box will vary, depending on the filter selected above. Simply click on the name of the desired certificate type to select it for this assignment.

Below the filter option are the Start and End Date boxes. These values are optional, and allow for distinct assignments depending on the user’s completion date.

- **Start Date:** If a date is entered here, a user will only receive the certificate if they complete the course/conference/conference session **on or after** the specified Start Date. Users who complete it before that date will not receive the certificate defined in this assignment. If no value is entered here, only the End Date is enforced, if present.
- **End Date:** If a date is entered here, a user will only receive the certificate if they complete the course/conference/conference session **before** the specified start date. This cutoff is enforced as the first moment of the defined date (The instant immediately after midnight of the preceding night, Eastern Time). Any completions which occur on or after the end date will not receive the certificate. If no value is entered here, only the start date is enforced, if present.
- **If no dates are specified at all:** If both the Start and End date boxes are left empty, the user’s completion date will not affect whether or not they receive this certificate.

Below the Start and End Date boxes is the Available to the following Credit Types selection box. You must select a value here. Each certificate assignment will only apply to one credit type for that course. **If you wish a certificate to be available to all credit types, you must create a separate assignment for each credit type.**

Below the Credit Types box is the Notes section. This is an optional space in which you may enter any brief notes pertaining to the certificate assignment you deem appropriate. These notes will be visible only to other administrators who have the ability to view and edit certificate assignments for this course/conference/conference session.

Lastly, the Users should receive this certificate option allows you to define whether the certificate should only become available if the Course Provider verifies the user’s completion, or if it should be

available as soon as the user completes the course/conference/conference session. **Important note:** Selecting “Manual Delivery” has a direct impact on how registrations become verified for the course. Verification is also dependent upon other factors. Other settings within a course/conference/conference session may interfere with the Manual Delivery option.

Once you have made the appropriate selections for the above options, click Save to assign the certificate to the course.

Custom Attributes on Certificates

Custom attributes (like those seen in the work setting list) can be created individually by each state. Doing so requires coordination with KMi. Once the custom attributes are created, these attributes can be listed on custom certificates. A good example of this is a license number. License numbers are not, by default, collected by TRAIN. However, your state can develop custom attributes to collect such license numbers. At which point, those license numbers can be listed on your states certificates.

Managing TRAIN Surveys

Creating Surveys

To create new surveys, you must have the **Survey Administrator** role.

All surveys are created under “Administration” / “Surveys”

Creating a survey is divided into four distinct parts:

1. Creating Survey Questions
2. Creating Survey Properties
3. Designing the look and feel of the Survey
4. Adding Questions to the survey and (optionally) organizing them into Question Sections.

Creating Survey Questions

Survey questions are created and managed just like questions for Assessments and Evaluations. You must first create a Question Category for organizational purposes before you can create questions within the category. For specific instructions related to this process view the section detailing Evaluations and Assessments.

There is one new question type specific to Surveys – the “Multi Rating” question type. This question type provides four unique features:

1. It allows for multiple rating grids to be created for each question.
2. It allows for the use of default “N/A” selections that can be applied to the question as a whole, or each individual Rating column.
3. It allows for the collection of “Comments” in addition to the radio button selections defined in the matrix grid.
4. It allows for the definition and display of “Help” text that can provide additional explanation to the user on how to answer the multi-rating question.

Multi-rating questions are created in four steps:

1. **Common** – this information is the most basic information related to the question: the text of the question, its “Active” status, survey name, etc.
2. **Rating Settings** – this is where you are able to build the grid of multi-rating selections. Each “Rating” value adds a new Column of radio buttons. Each “Scale” value defines a radio button to select from within each Column.
 - a. The ‘Axis label’ will define the row or column names for the axis of the multi-rating question type you have selected. That is to say, if you have selected a Y axis question, these short labels will appear on the Y axis of your grid

- b. The difference between x and y axis questions is the orientation of the grid. If you select Y axis, the short labels you provide will appear vertically within the survey (i.e., along the Y axis). X axis questions will display the short labels horizontally across the top of the grid.
3. **Help** – this section allows you to enter information that can help the user answer your question. This information is displayed to the left of the selection grid within the question window.

You can **Delete** unused survey questions. Within the survey question categories, if a survey question is unused and is not assigned to any survey, you can now delete this question. This is different than deactivating a question. When a question is deactivated, it can be reactivated if needed – deleted questions cannot be restored. Neither deleted nor deactivated questions will appear in any survey. If you are not sure what to do with a question, we recommend deactivating the question, rather than deleting it.

Creating Survey Properties

From the “Survey List” click the “Add Survey” button. The following information can then be defined:

1. **Common tab:**
 - a. **Survey Name** – your survey name.
 - b. **Survey Type** – your survey type:
 - i. Anonymous survey will show up on the Home page of TRAIN **before** the user logs in and can be taken by **anyone** (hence, anonymous). **NO** information about the user is captured.
 - ii. Public surveys can be taken by anyone within the groups that are selected for the survey.
 - iii. Public with Review survey can also be taken by anyone within the selected groups, however this survey **requires the full review process** for any user who wishes to participate.
 - c. **Start / End Date** – provides a window of availability for the survey.
 - d. **Allow Skipping Questions** – allows the user to answer the question in any order they choose. If left un-checked, the user has to take the survey questions in the order specified.
 - e. **Show Section Navigation Menu** – this option displays a list of a survey section titles to the user before beginning the first question. Each title is hyperlinked to jump straight to that section.
 - f. **Prevent Incomplete Submission** – this forces the user to answer every question in order to complete the survey. However, if the user submits their results before completing all questions, their submitted values will be stored and made available for reporting; even though the user is not full completed with the survey.

- g. **Printable** – this allows the user to access the “Print” icon and generate a PDF version of the survey.
- h. **Active** – turns the survey on/off to users.
- i. **Show link in survey player** – allows you to create a “custom” button at the bottom of the survey window.
 - i. **Link Name defines the text/name of the button**
 - ii. **Link URL defines the action of the button. This can be a web URL (including a TRAIN URL) or a Mailto: link.**
- j. **User Types** – this allows you to create a “mini grouping structure” related **ONLY** to the survey. Users will be asked to make a selection from the defined user types, which in turn can be used to filter survey reports. Please note that user types will be listed in alphabetical order.
- k. **Uploaded Help Document** – allows you to upload a document of **your** creation if you would like to provide additional help/assistance/information to the user via word document, excel spreadsheet, power point, rich text, plain text, html, or PDF. The system allows for one help document to be uploaded per survey.

2. Notifications / Reminders

- a. Reminders perform the following action:
 - i. When a defined percentage of an expected user base completes a survey, an email is sent to a defined email address. You can select what email address the notifications will be sent to under the ‘Notifications’ tab in the survey wizard
 - ii. Reminders are in place for Anonymous surveys since there is little information we can capture related to each user.
 - 1. Example: A user-type of “Full Time Employee” is created. We expect – though we can’t be sure – around 500 full-time employees will take this survey. We could then create a reminder stating that when 250 users (50%) have completed the Anonymous survey having selected “Full Time Employee” as their user type, send a notification email to info@kmionline.com.

- 3. **Introductory Text** – this will be the text displayed on the **FIRST** page of the survey. If you create a Facilitated Survey, there are three distinct “blocks” of text that are displayed under the following conditions:

- a. **Pre-Review:** this is the text the user will see when first taking the survey.
 - b. **Reviewer:** this is the text the selected Reviewer will see when reviewing the survey.
 - c. **Post-Review:** this is the text the original user will see once the reviewer has returned their feedback to the user and they have opened the survey to go through the reviewer's answers.
4. **Final Page Text** - this will be the text displayed on the **LAST** page of the survey. If you create a Facilitated Survey, there are three distinct "blocks" of text that are displayed under the following conditions:
- a. **Pre-Review:** this is the text the user will see when first taking the survey.
 - b. **Reviewer:** this is the text the selected Reviewer will see when reviewing the survey.
 - c. **Post-Review:** this is the text the original user will see once the reviewer has returned their feedback to the user and they have opened the survey to go through the reviewer's answers.
5. **Visibility** – this is the standard visibility interface that defines what group(s) of users will have the ability to participate in the survey. Anonymous surveys do not adhere to visibility rules and are only available before a user logs in.

You can edit these survey properties at any time by clicking the Pencil icon next to the survey name.

Designing a Survey

Once you have created and defined the survey properties you can "design" the survey. This lets you create your own custom look to the survey.

To access the design module, click the design icon (protractor) next to the survey name. A survey "design" is completed through the following steps:

1. **Survey Template** – if you'd like to skip the task of designing your survey and use another pre-configured design, you can look through the Templates provided. If you see one to your liking, click the template, and click "Load." You can then edit the remaining properties to your liking.
2. **Colors...** - each color selection allows you to specify the color for different elements within the survey window. TRAIN provides a "live" preview of your selections so that you can see your design as you build it.
3. **Display Navigation Menu in the Survey** – this option turns the rollover "Navigation" button on or off.

4. **Window Parameters** – this allows you to define various “Browser Behavior.” The recommended window size is 830x590px.
 - a. **NOTE: Due to the specific design of the TRAIN survey window, we highly recommend using a Width of 830 and a Height of 590. This will ensure your survey “fits” the browser window properly. Though this choice is entirely up to you.**
5. **Banner Image** – allows you to upload a custom “Banner” image to be displayed at the top of the survey. The recommended banner size is 800x200px.
6. **Left Side Image** – allows you to upload a custom “Left” image that will be displayed on the left side of the survey window. The recommended left side image size is 500x175px.
7. **Background Image** – allows you to upload a background image to be displayed “behind” every other element. If this is used we recommend only texture images. Full images with distinct pictures or high contrast could be overly distracting when taking a survey. The recommended background image size is 800x600px.
8. **Save Current Design as Template** – allows you save your design as a template to be used again, as well as share your template with other TRAIN administrators.

When you have completed your design click “Save and Back.”

Adding Questions and Sections

The final step in building a survey is to add the questions. To add questions to a survey click the Question icon (question mark) next to the survey name.

1. Click the “Add Questions” button at the bottom of the page to search through the question categories.
2. When you find a question(s) you wish to add, click the “Add Question” button.
3. You can also add Question Sections to the survey. Question Sections help to organize your survey. Additionally, each Question Section can be given its own “Left Hand” image to keep things looking “fresh,” as well as its own “Help” document if you’d like to provide information specific to each section.
4. To add question sections, click the “Add Section” button at the bottom of the page.

At any time you can “**Preview**” the entire survey from this page, and review all interactions from the Design, the User Type Selections, the Section Organization, etc. This is a very key feature in designing the survey that should be used to verify that your survey meets your standards and expectations before distributing it to the TRAIN community. **Note: No user type selection is made in preview mode.**

Survey Reporting

Please note that inactive surveys cannot be reported on. It is recommended that you use the 'End Date' function, rather than the active function to control user access to the surveys. This will allow the survey to remain active for reporting purposes.

YouTrack

YouTrack is an integrated support system that provides everything from online technical support, to problem reporting, course suggestions. YouTrack provides a forum to express hopes for TRAIN, express general concerns, or even request additional functionality or enhancements for your affiliate.

When to Use YouTrack

The main function of YouTrack is to provide online, trackable, and reliable technical support. As mentioned above, YouTrack can also be used for any concern or question you might have about TRAIN. In order to maintain a manageable list of YouTrack items, each item must be entered as a particular “Type” of Item. These items, as well as their applications, are:

1. **Tech. Support** – Used for any technical questions regarding TRAIN.
2. **Failure or Problem** – Used to report and problems, errors, or bugs in TRAIN.
3. **Enhancement** – Used to request Enhancement information for your state, or to perhaps suggest possible future Enhancements.
4. **Change** – Used to request particular changes in TRAIN, including requests for Customizations and Custom Fields. A change request is generally a small item, such as a text or display change. Items entered as Change might be upgraded to Enhancement (depending on the specific change requested) at the discretion of PHF and/or KMi. Previously split as Change Request, Customization, and Custom Field Request.
5. **Other** – Used for any Request that doesn’t fit into any other available “Type.”
6. **New Course Suggestion** – Used to suggest the posting of courses into TRAIN that are available to the Public Health Community.
7. **Feedback** – Used to provide feedback when testing a new build of TRAIN. State Administrators are able to preview new updates to TRAIN on the Staging Servers. If you choose to report any errors, comments, or suggests regarding the build, be sure to enter them into the YouTrack as New Build Feedback items on the production servers. The Staging RMS is not monitored for support in any way.
8. **Wish List** – Items that are listed as enhancements, but don’t have funding, are shown as Wish List items.

Accessing YouTrack

Before submitting a new YouTrack ticket, you might want to look through the tickets that have already been posted. It is possible that other affiliate administrators have similar thoughts or concerns, to which you will be able to add your own feedback and ideas. There are several ways to access YouTrack in order to view tickets:

Accessing YouTrack from your TRAIN administrative account, method 1

1. Click the **Administration** tab, located in the **Navigation Tab** bar.
2. Click the link at the bottom of the left-hand navigation labeled **YouTrack (RMS Replacement)**.

3. A new browser tab (or window, depending on your browser configuration) will open and load the YouTrack dashboard at <https://yt.kmionline.com>.

Accessing YouTrack from your TRAIN administrative account, method 2

1. If not already viewing the **Home** tab, click the **Home** tab, located in the **Navigation Tab** bar.
2. In the **Dashboard** on the right side of the page, expand the section labeled **My Action Items**.
3. Click anywhere on the line containing the item name **New Requests**.
 - The “Number of pending items” for this line corresponds to the number of new YouTrack requests over the past 7 days.
4. A new browser tab (or window, depending on your browser configuration) will open and load the YouTrack dashboard at <https://yt.kmionline.com>.

Accessing YouTrack directly when not logged into TRAIN

1. Open a web browser and go to <https://yt.kmionline.com/>.
2. *Do not enter a login, email, or password on this page.* Simply click the yellow TRAIN icon below the text boxes.
3. Your browser will redirect to TRAIN National (www.train.org). Enter your TRAIN login name and password and click the **LOGIN** button or press the Enter key on your keyboard.
4. Your browser will load the YouTrack dashboard.
 - Note that at this point you are also logged into TRAIN National.

Viewing the List of YouTrack Tickets

The YouTrack dashboard is configured to be a clean and minimal summary of YouTrack tickets.

However, the simplicity of this starting point should not mislead you. There are practically limitless options for viewing YouTrack tickets. KMi has provided links to some of the more useful views at the left side of the page, under the **SAVED SEARCHES** section.

- **Assigned to me (open)** – Shows the YouTrack tickets which are assigned to you and have not yet been completed.
- **Commented by me (open)** – Shows every YouTrack ticket which you have ever added at least one comment to and has not yet been completed.
- **Reported by me (open)** – Shows the YouTrack tickets you have created which have not yet been completed.

Additional saved searches can be accessed by clicking the 5 MORE link:

- **All Open Issues** – Shows every open YouTrack ticket currently in the system.
- **Assigned to me** – Shows all YouTrack tickets assigned to you, completed or not.
- **Commented by me** – Shows every YouTrack ticket to which you have ever added at least one comment.
- **Pending Schedule** – Shows YouTrack tickets which have been identified as needing work from the developers and which have not yet been scheduled into any monthly build.
- **Reported by me** – Shows all YouTrack tickets you have created, completed or not.

An important thing to note is that clicking any of these links will add text to the search bar – for example, clicking **Commented by me (open)** adds this to the search bar:

```
commenter: me State: Unresolved
```

The contents of the search bar are ultimately responsible for the list of issues which appears on the page. (The dropdown box to the left of the search bar, which by default shows “Everything,” can also be used to refine the list, but it is usually best to keep this set to “Everything” in order to give you the most complete view of YouTrack tickets.) The search box is extremely versatile and allows searches by any combination of the following parameters. These parameters can also be found by opening the FILTERS section on the left side of the page. If you begin typing any parameter into the search bar, YouTrack will recognize it and prompt you with help for using it.

- **Tag** – Search by a particular tag applied to a ticket.
 - Currently the only tag used by YouTrack is **Star**.
- **Created** – Date or date range of a ticket’s date of creation.
- **Updated** – Date or date range of a ticket’s last update.
- **Updater** – User who updated a ticket.
- **Resolved date** – Date or date range of a ticket’s date of closure.
- **Reporter** – User who submitted a ticket.
- **Voter** – User who voted on a ticket. Voting is performed by clicking the “thumbs up” icon at the bottom right corner of a ticket’s Description text when viewing an individual ticket.
- **Affiliate** – The affiliate a ticket is marked as pertaining to.
- **Assignee** – The person at KMi who the ticket is assigned to.
- **Priority** – The priority of a ticket, as shown on the right side of the page when viewing an individual ticket.
- **State** – The ticket’s state, e.g. *Submitted, In Progress, Client Feedback Needed*, etc.
- **Type** – The type of the ticket, e.g. *Tech. Support, Change, Enhancement, Wish List*, etc.
- **Version** – The build a ticket is assigned to.

Adding a YouTrack Ticket

Adding a YouTrack ticket is simple and straightforward. To add a new ticket:

1. Access YouTrack as described in the section [Accessing YouTrack](#).
2. There is an orange button labeled **Create Issue** at the top of every page in YouTrack. Simply click this button. A new page will open with a blank ticket.
 - When applicable, the down arrow on this button will be active with options for you to create a ticket which relates to, depends on, or is a subtask of the ticket you are currently viewing.
3. Enter a Summary for the ticket. This is the “title” text which appears in the list of tickets.
4. Enter a complete description of the issue into the Description box.
 - When cutting and pasting formatted text, the formatting will be lost. However you may add some formatting back in by using wiki markup in the Description text. Instructions for using this can be found by clicking the [wiki markup](#) link above the Summary box.
5. If you would like to attach any files to the ticket, click the **Attach file...** button. Files of any format may be added, but keep in mind other people viewing the ticket may not be able to view files which use more obscure formats.

6. On the right side of the page, click the blue values to change **Priority** and **Type** as appropriate. Other fields are best left at their default values.

In addition, you may add a ticket to YouTrack simply by sending an email to support@train.org.

Messages sent to this address are automatically added to YouTrack. You will be notified via email when updates are made to tickets created this way.

The TRAIN Support Team will then review your item as soon as possible and update the item's state, as well as provide you with a reply. The meanings of the different States are:

- **Submitted** – Your item has been successfully added to YouTrack.
- **Support Reviewing** – A Support Team member is reviewing your ticket in order to determine what course of action needs to be taken and who best to resolve the item (KMi or PHF). *Previously split as both **Acknowledged** and **Under Review**.*
- **In Progress** – A Support Team member is actively working on your ticket.
- **Ready For Testing** – The KMi development staff is testing the change.
- **Testing Completed** – The KMi development staff has determined that the change reflects the request.
- **Uploaded to Pre-staging** – The change is uploaded to the TRAIN pre-staging site.
- **Uploaded to Staging** – The change is uploaded to the TRAIN staging site.
- **Uploaded to Production** – The change is uploaded to the TRAIN production site.
- **Work Completed** – Your ticket has been resolved entirely.
- **No Change Needed** – Your ticket has not been approved for further consideration and is removed from the active list of tickets. *Previously labeled as **Declined**.*
- **Client Feedback Needed** – If there are questions about your request or additional discussion is required, the ticket is listed as **Client Feedback Needed**.
- **Verification by Client Needed** – If the requested change does not require a build (for example, group additions), once the change is made, the affiliate may review and confirm the change is made correctly.
- **Duplicate** – The ticket has been recognized as a duplicate of another ticket. It is effectively the same as **No Change Needed**; there will be no further consideration of this ticket and it is removed from the active list of tickets. There will also be a link to the duplicate ticket.

Reviewing and Editing a YouTrack Ticket

Open the item from the list of items by clicking its ticket ID or Summary, or enter the ticket ID into the search bar.

Scroll to the bottom of the page and click the **Add Comment** button.

You can also edit any comment you have previously added by clicking the pencil icon at the right side of that particular comment.

Keeping Up with YouTrack Tickets

Whenever there is a new reply posted to one of your YouTrack tickets, regardless if the reply is from the Support Team or from another user, you will be notified via e-mail that your item has been updated.

Simply click the provided link to go directly to your ticket. However, there might be times where you find a

YouTrack ticket created by another user that you would like to monitor and receive notifications when the ticket has been updated. In order to receive update notification e-mails on YouTrack tickets that do not belong to you, click the star icon to highlight it. The star icon can be found on the left side of the ticket in the list of tickets and at the upper left corner of the ticket summary at the top of any individual ticket's page.

To stop receiving such updates, click the star icon again to un-highlight it.

Getting Support

Using Help and References

For more information, refer to the following TRAIN resources:

- Online [Help](#) feature.
- **TRAIN References** document board for TRAIN administrators.
- [About this Site](#) section of TRAIN, which includes answers to common questions and general, up-to-date TRAIN information.

Contacting KMi for Technical Support

Technical support is provided by KMi staff and is available during the following hours:

- **Phone:** (614) 224-0664 ext. 202
 - **Hours:**
 - Monday-Thursday: 7:00 AM (EST) - 12:00 AM (EST)
 - Friday: 7:00 AM (EST) - 8:00 PM (EST)
 - Saturday: 12:00 PM (EST) - 6:00 PM (EST)
 - Sunday: 6:00 PM (EST) - 12:00 AM (EST)
- **E-mail:** support@train.org

Note that messages sent to support@train.org are automatically entered into YouTrack and given support ticket numbers.

KMi's General Contact Information:

- Address: 330 West Spring Street, Suite 110
Columbus, Ohio 43215 USA
Phone: 614.224.0664
- E-mail: support@kmionline.com

Note that messages sent to support@train.org are automatically entered into YouTrack and given support ticket numbers.

Contacting PHF for Non-Technical Support

Non-technical support is provided by PHF staff to help ensure affiliate site managers are able to manage their site in accordance with TRAIN site policies.

Examples of Non-Technical Support:

An affiliate site manager may need:

- assistance with consistently assigning the Core Competencies for Public Health Professionals to courses
- help deciding who should be in groups, or advice on handling issues with course providers
- assistance with preparing a TRAIN Memorandum of Understanding with an academic partner to help with reporting
- consultation on ways to use the TRAIN features to promote the competency-based courses

How to Access Non-Technical Support Services:

1. E-mail PHF support staff at training@phf.org with your question(s) and/or request(s) for support. Please have **Non-technical support request** as the e-mail subject line.
2. Call PHF at 202-218-4400 and request PHF non-technical support services. Please leave a detailed voice message explaining the type and amount of support needed.

Note: PHF will respond to all non-technical support requests within 48 hours. Responses will vary depending on the nature of the request. Please see below for a more detailed description

Non-Technical Support Available

Affiliates receive up to 10 hours of non-technical support each subscription year. Any non-technical support request that requires 30 minutes or more of assistance must be pre-approved by the affiliate. PHF staff will e-mail the site administrator with an estimate of the time needed to fulfill the request and ask for approval.

Additional Non-Technical Support

Affiliates may wish to maximize the use of their TRAIN site by soliciting additional support from staff at PHF. The following two types of additional support services are available:

1. On-site training: On a limited basis, PHF can travel to your location to help prepare affiliate staff and others to use TRAIN more effectively for a “per day” fee, plus travel expenses (airfare, hotel, ground transportation, mileage) and a per diem at the federally approved rate. On-site training will be available on a first come, first serve basis. PHF reserves the right to increase the per day rate based on the scope of work requested by the affiliate.
2. Purchase additional non-technical support: Affiliates may purchase additional non-technical support from PHF staff in either 5-hour or 20-hour increments. For pricing information, please contact PHF by e-mail at training@phf.org or by phone at 202-218-4400 (request PHF non-technical support services).

Note: Due to limited staff availability, additional support services will be available on a first come, first serve basis only

Appendix A. Sample TRAIN Affiliate Site Administrator Job Description

TRAIN affiliate site administrator responsibilities include the following tasks related to site management, communications, and coordination

Site Management:

- Process applications from new course submitters specific to the affiliate's jurisdiction in accordance with TRAIN policies, and gather additional information as required to register or reject applicants. (Daily, or as needed.)
- Process new listings of public health courses submitted by public and private course providers to the TRAIN affiliate site, and approve, reject, or modify courses as indicated. (Daily, or as needed.)
- Manage the entry of courses offered by the agency and by any third-party providers for whom the agency has made a special arrangement to enter data about their courses.
- Establish and maintain course provider records as needed to track special conditions of approval, reasons for rejection, or responses to marketing efforts.
- Respond promptly to all user and provider inquiries. (Daily, or as needed.)
- Define and manage the primary and back-up roles of all staff and partners in the management of the TRAIN affiliate site. Coordinate the agency's use of available telephone and e-mail technical and administrative support.
- Assign and manage access rights of individuals and groups for the affiliate site. Ensure all persons that administer the site review reference materials, understand TRAIN policies, and receive guidance or peer review as needed to correctly enter, approve, and edit courses.
- Implement TRAIN policies and enforce policies with all affiliate site users.
- Post and update announcements, documents, discussion boards, or other information posted in the knowledge management areas of the TRAIN affiliate site.
- Perform periodic quality assurance reviews of listings and provide guidance, reminders, and training within the jurisdiction to improve the quality and timeliness of data on the affiliate site. Participate in periodic quality assurance processes with PHF to ensure affiliate course and course submitter management practices are consistent internally and with nationwide policies.
- Generate reports using course, course provider, and user data for assessment or evaluation purposes.

Communications and Marketing:

- Maintain communications about TRAIN with partners, sponsors, course providers, and users.
- Conduct outreach to invite providers of training specific to the affiliate's jurisdiction to enter their courses on the affiliate site, in accordance with TRAIN policies. Refer providers of nationally or regionally available courses to the national TRAIN site for registration.
- Market TRAIN to potential users in the public health and health-related fields through affiliate marketing materials, presentations, e-mail messages, and other promotional strategies.

Coordination and Partnerships:

- Work with internal and external partners to maximize the use and benefit of the TRAIN affiliate site. Help establish or incorporate TRAIN into workforce policies, Memoranda of Understanding, strategic plans, performance reports, and other systems.
- Participate in meetings of the TRAIN Affiliate Consortium and provide input regarding the development of future site enhancements, such as changes to the network's features, common course submission fields, site policies, and quality assurance processes.