

ACLS Medical Training Platform

Manager-Level Access User Guide

This document will guide you through the features and benefits available with FULL MANAGER ACCESS.

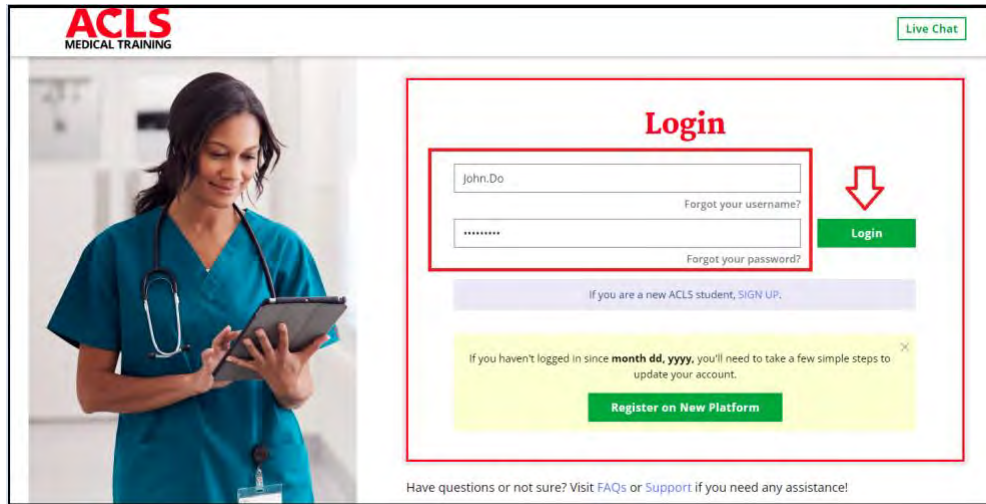
- **Manage User**
- **Add User: Batch Import**
- **Manage Organization Group**
- **Manage User Groups**
- **Plan & Enroll**
- **Reports**
- **Manage Security Roles**
- **Assign Security Roles**
- **Manage Enrollments**

STEP 1 LOGIN

Go to www.aclsmedicaltraining.com and click LOGIN.



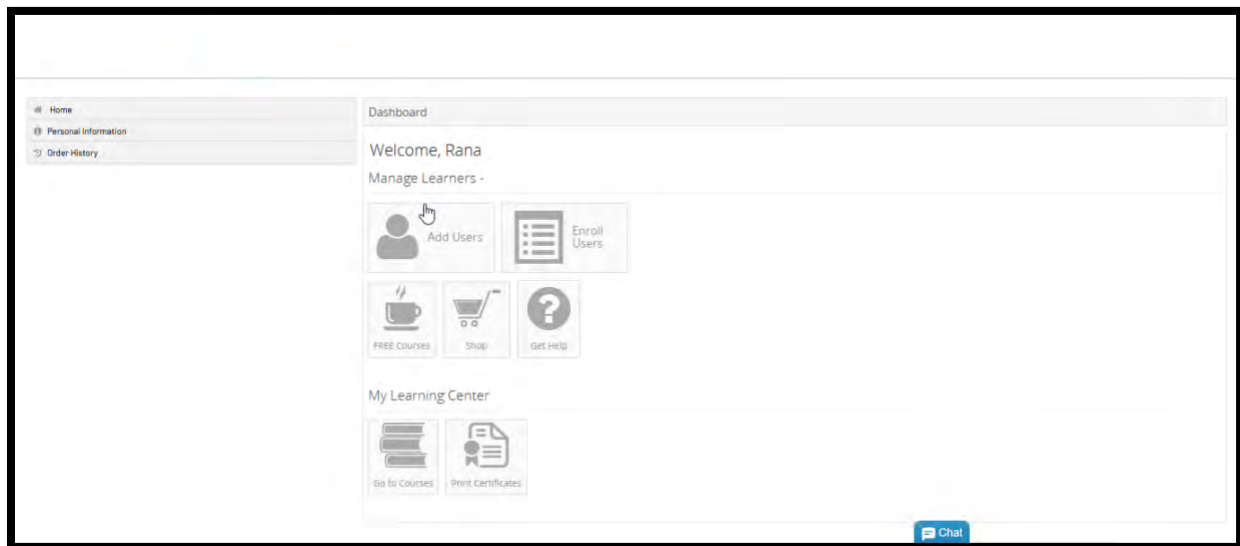
Enter your Email Address and Password, then click **Login**.



STEP 2

VIEW YOUR DASHBOARD (Desktop View)

Once you have logged in with your credentials, you will see your dashboard. Once you select **ADD USERS** or **ENROLL USERS**, you will be taken to the manager view of the training platform to access reports, change user profile details, and print or download user completion cards and certificates.



OR

You can also login through <https://lms.360training.com/lms/login.do>
Enter your Username and Password, then click LOGIN.

LOGIN

Please enter your Username and Password below.

Username:

Password:

STEP 3 GUIDED TOUR

You may choose to step through tutorials or click CONTINUE.

GUIDED TOUR

Would you like to take a guided tour of the Learning Management System? Select the box below to view the guided tour.

Don't show this message again

Alert Notification Manager Report Learner Mode Manager Mode

HIPAA Exams

STEP 4 MANAGE USERS

You can navigate to this page by clicking ENROLL USERS or ADD USERS on desktop, or ASSIGN SEATS on mobile, or after logging into the training platform. Select ADD USERS to view the profile details of the learner.

Manage Users

Add Users: Batch Import

Add Users: Invitation

Manage Organization Groups

Manage User Groups

Manage Security Roles

Assign Security Roles

Manage Enrollments

Manage Users

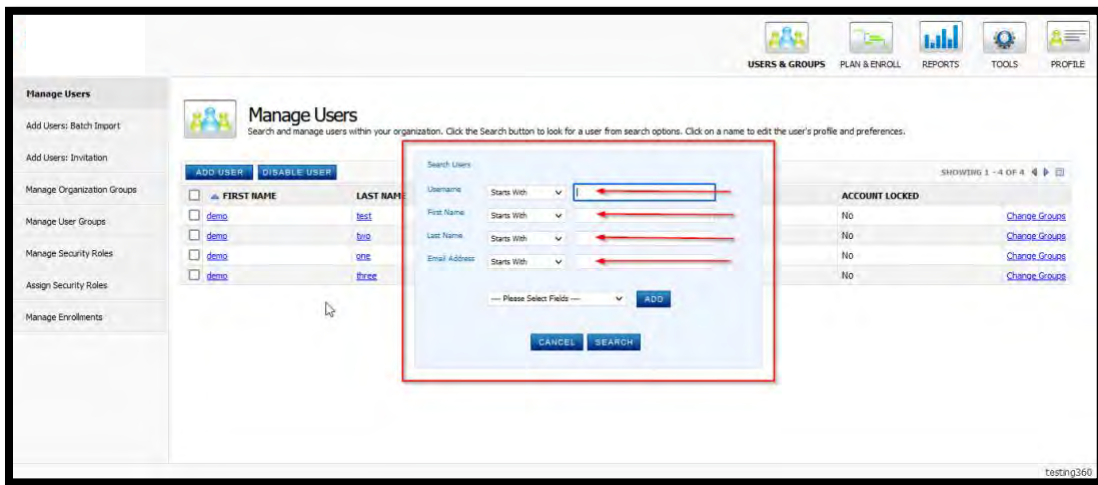
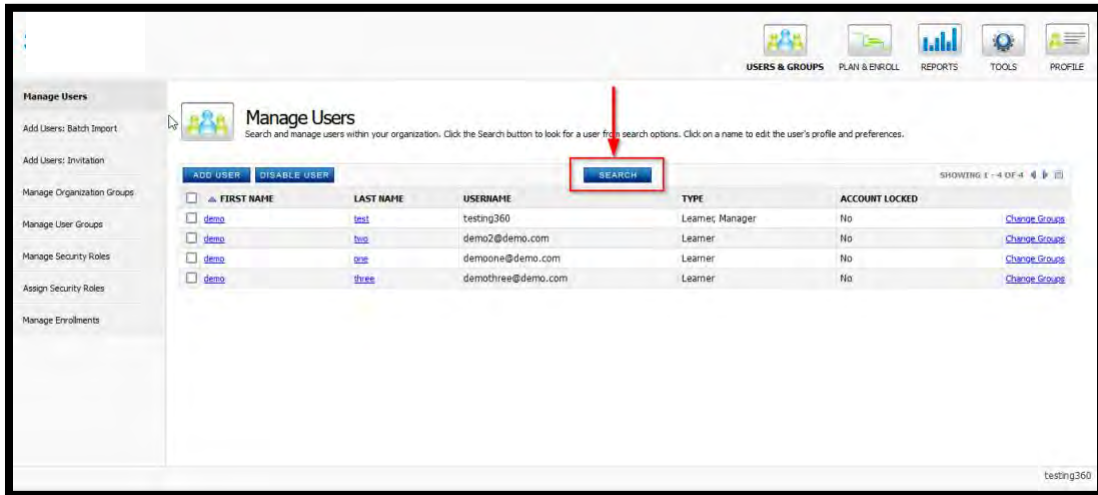
Search and manage users within your organization. Click the Search button to look for a user from search options. Click on a name to edit the user's profile and preferences.

SHOWING 1 - 4 OF 4

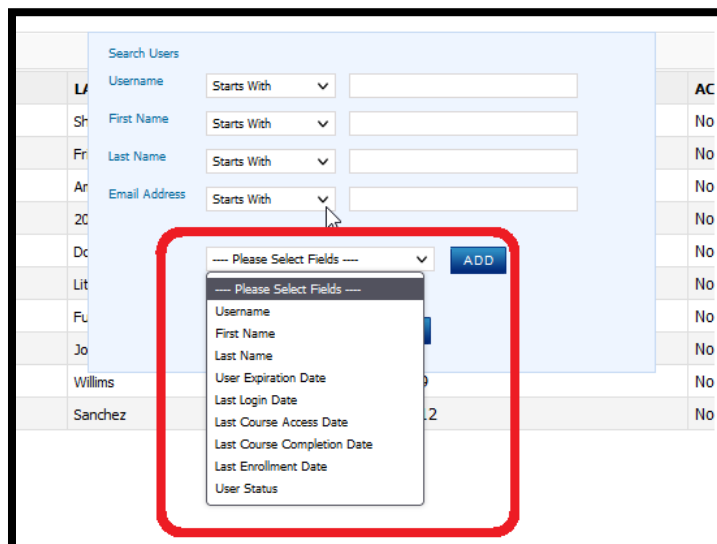
<input type="checkbox"/>	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED	
<input type="checkbox"/>	demo	test	testing360	Learner; Manager	No	Change Groups
<input type="checkbox"/>	demo	two	demo2@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	one	demoone@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	three	demothree@demo.com	Learner	No	Change Groups

testing360

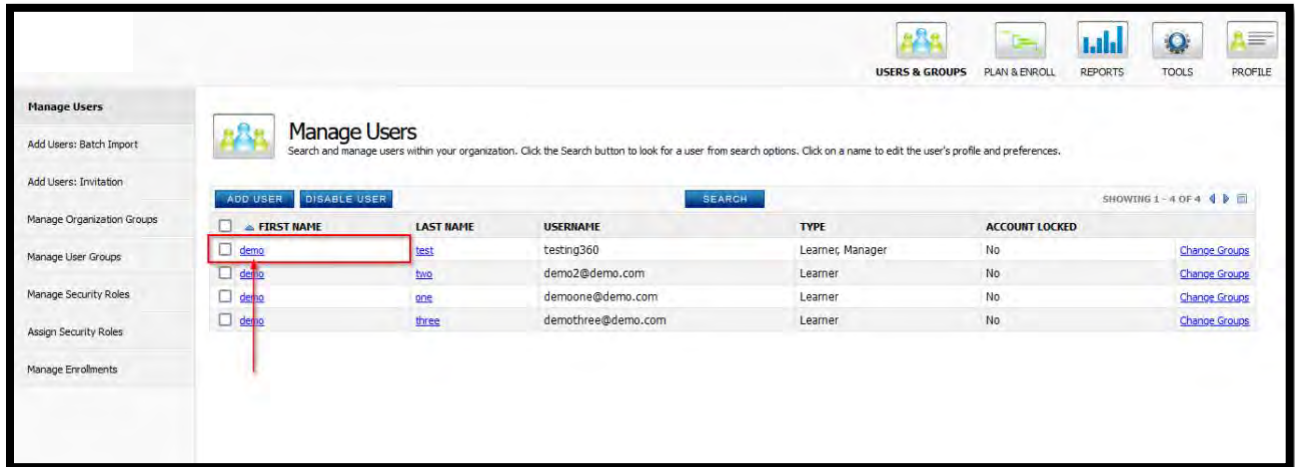
Click the SEARCH button to search by username, first name, last name, or email address.



To select additional search options or fields, click ADD for fields such as user expiration date, last login date, last course access date, last course completion date, last enrollment date, and user status.

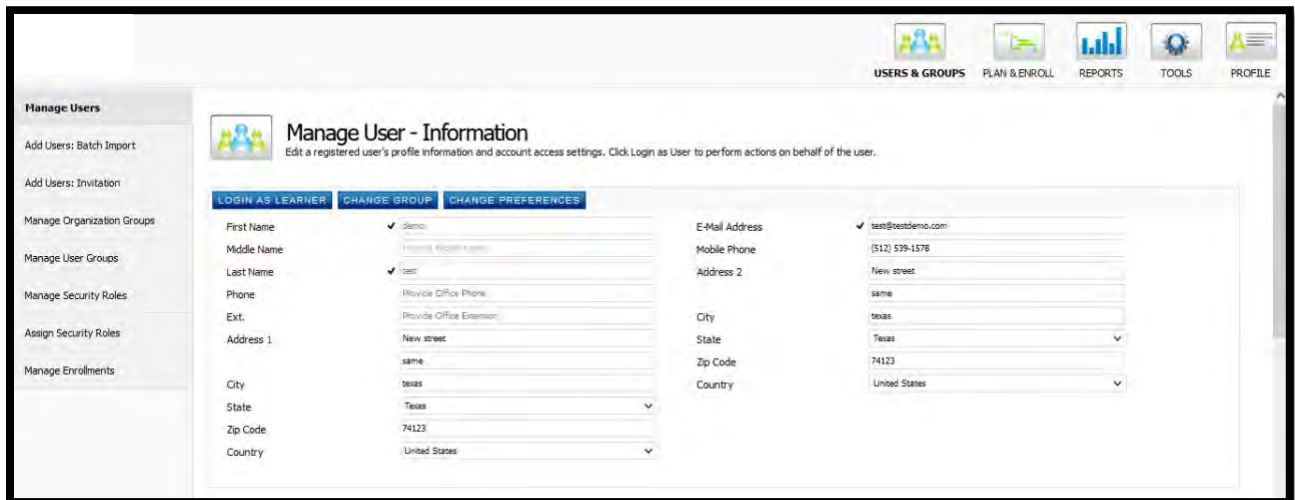


Click the first name of a user to view their user details.



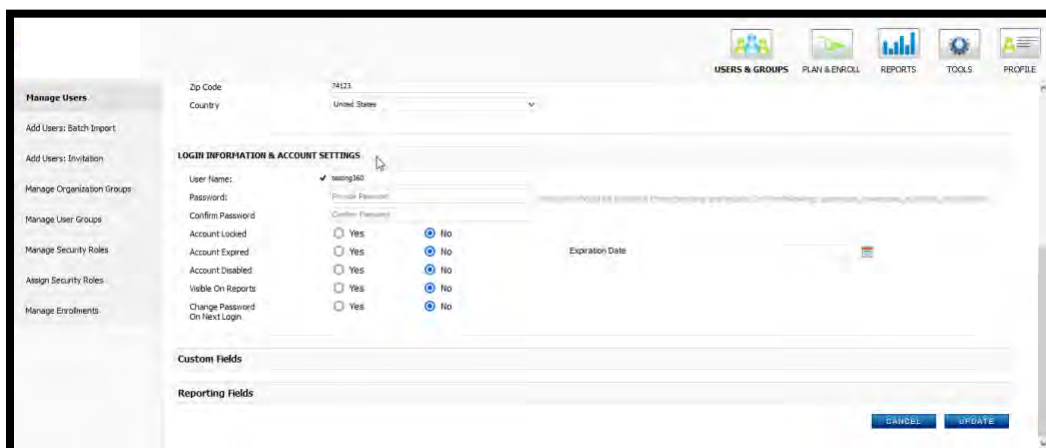
This opens the user profile page.

NOTE: You can edit all user details, including password, except for username.

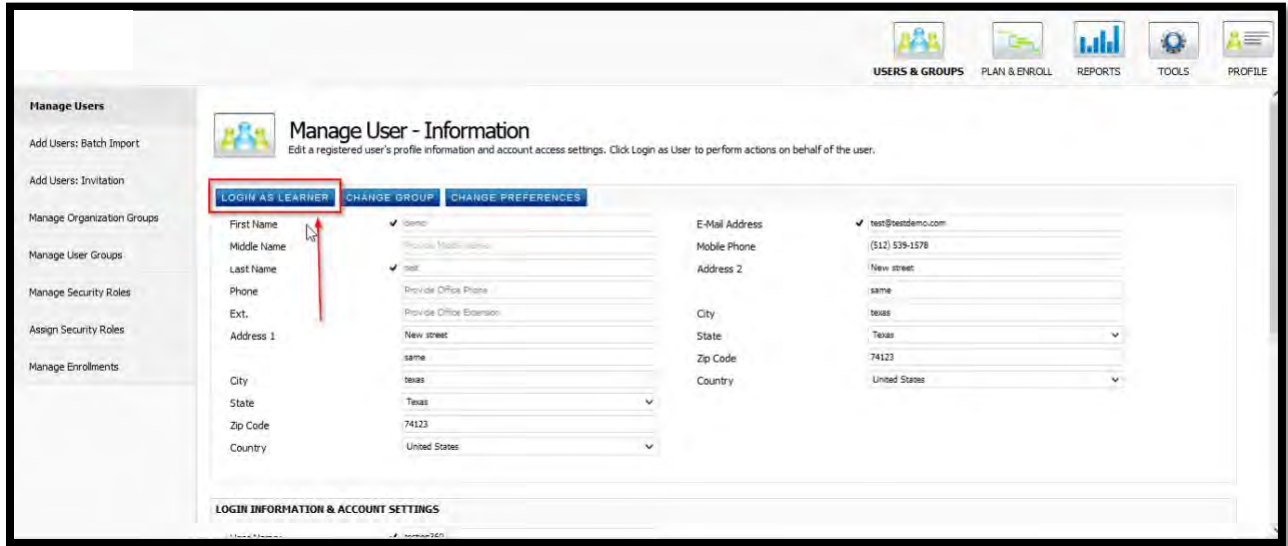


You also have the option to lock, expire or disable a user account by clicking the YES or NO option.

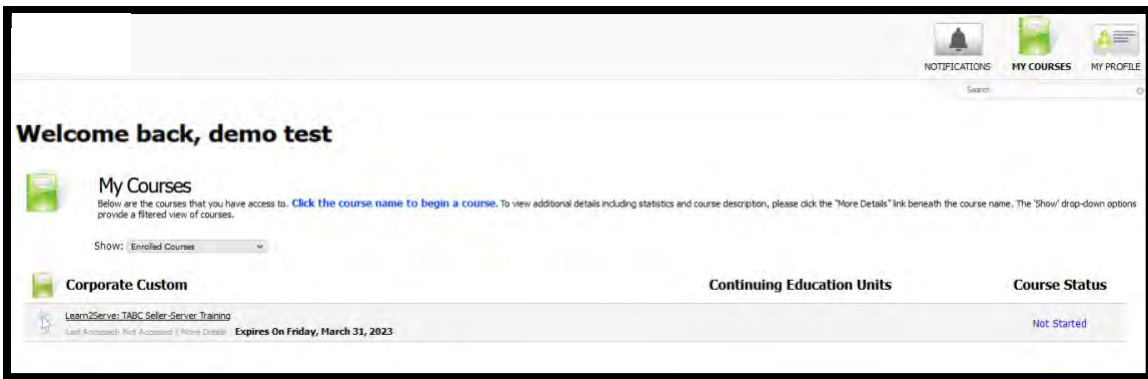
* NO is selected by default.



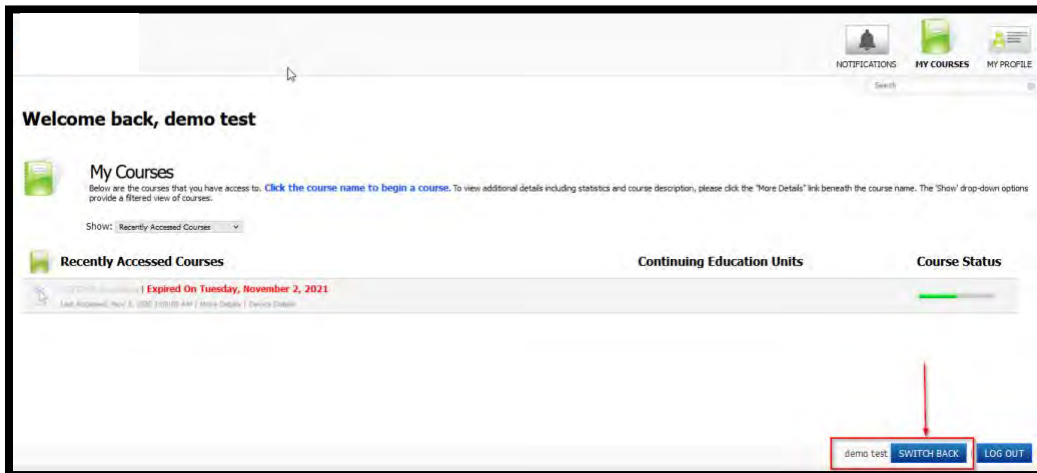
Click the LOGIN AS LEARNER button to access course completion records.



In this view, you will see the user's list of Enrolled Courses. To access the certificate of completion for a course, click PRINT CERTIFICATE.



To leave the LOGIN AS LEARNER view, click the SWITCH BACK button at the bottom right-hand corner of the page. This will take you back to your manager access page.

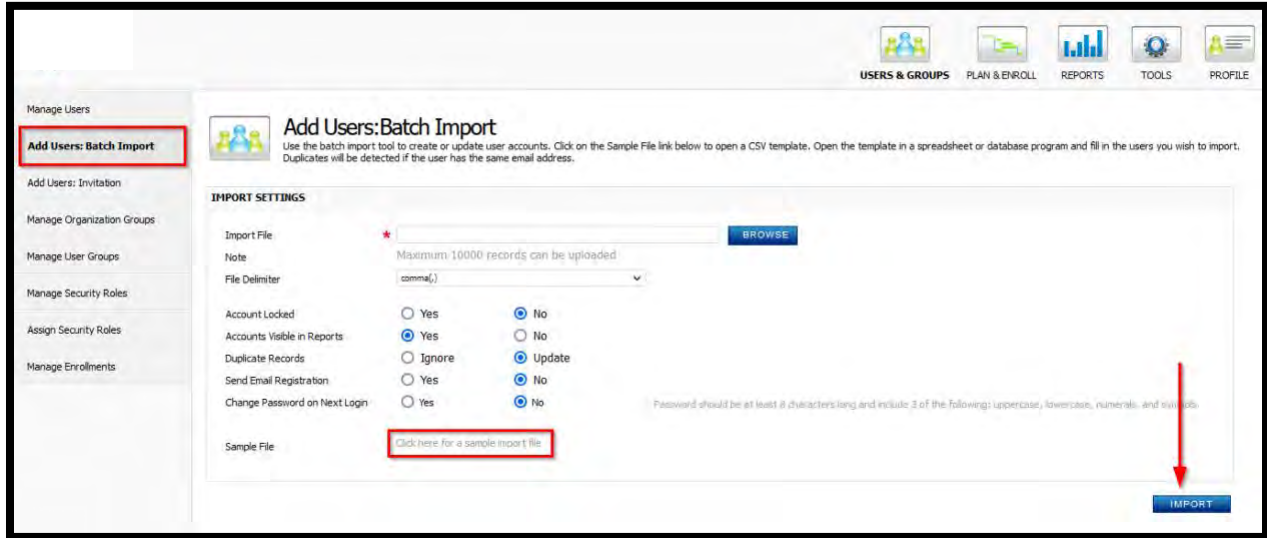


STEP 5

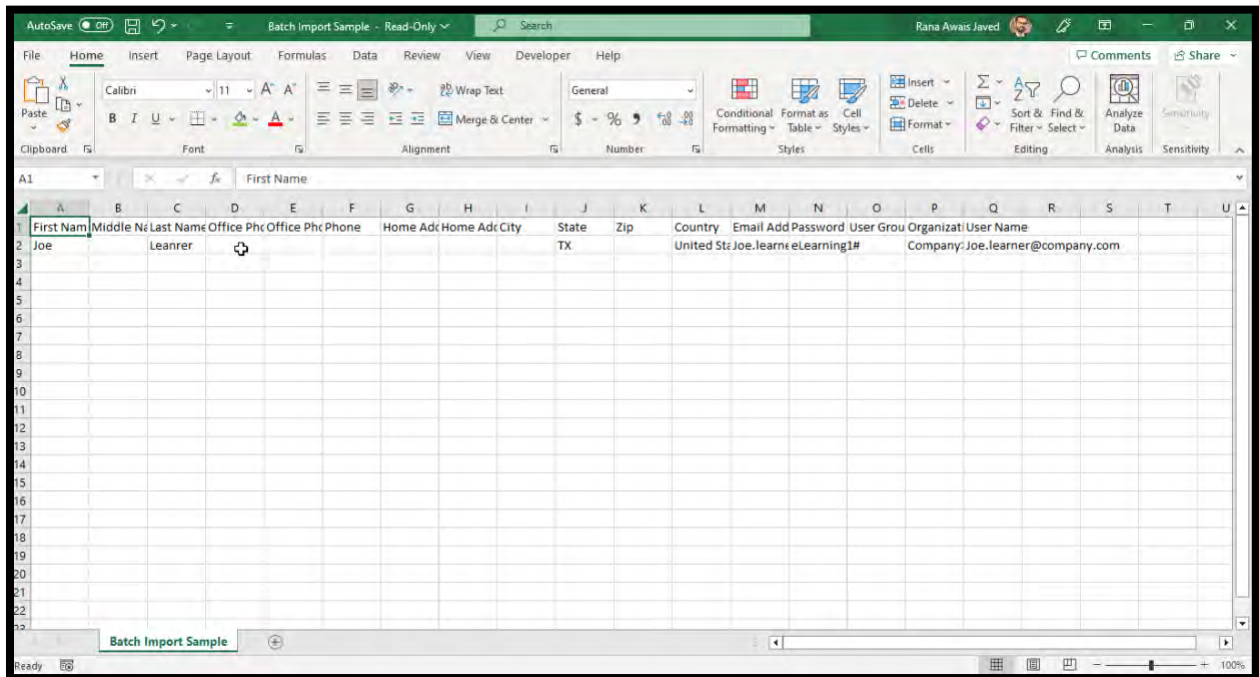
USER BATCH IMPORT

Use the batch import tool to create or update user accounts in bulk.

Click the SAMPLE FILE link at the bottom of the page to open the CSV template in a spreadsheet or database program, then fill in the users you wish to import. Duplicates will be detected if the user has the same username.



Sample Import file view

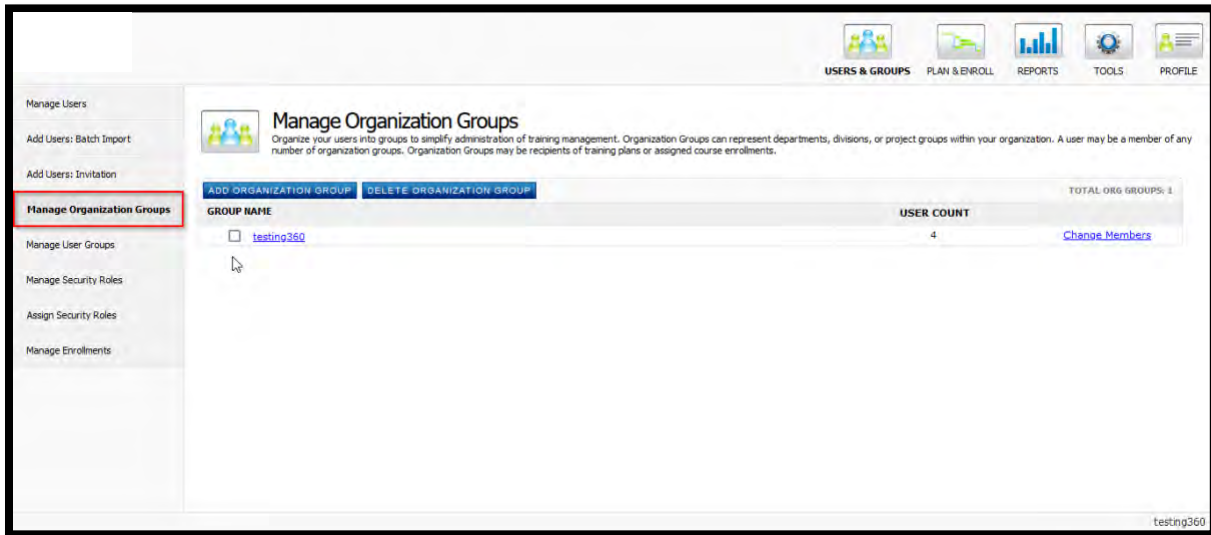


NOTE: If you need help with the batch import option, please contact support@360training.com.

STEP 6

MANAGE ORGANIZATION GROUP

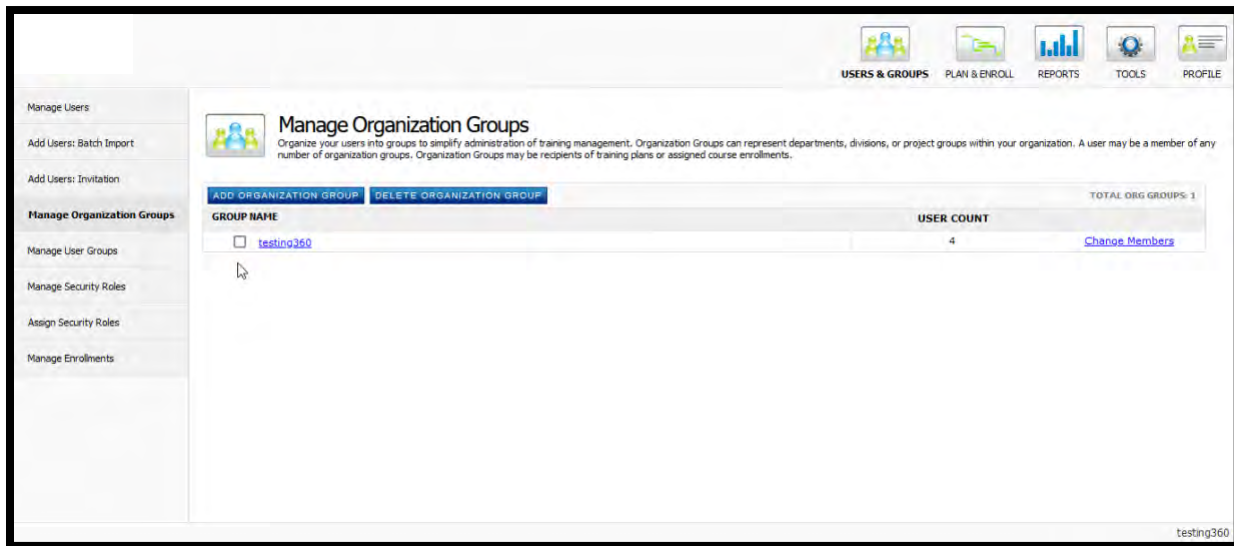
Click MANAGE ORGANIZATION GROUPS on the top left-hand side of the screen.



The screenshot shows the 'Manage Organization Groups' page. The left-hand navigation menu has 'Manage Organization Groups' highlighted with a red box. The main content area displays the title 'Manage Organization Groups' and a brief description. Below this is a table with two columns: 'GROUP NAME' and 'USER COUNT'. The table contains one row with the group name 'testing360' and a user count of 4. There are buttons for 'ADD ORGANIZATION GROUP' and 'DELETE ORGANIZATION GROUP' at the top of the table. A 'Change Members' link is visible next to the group name. The top navigation bar includes 'USERS & GROUPS', 'PLAN & ENROLL', 'REPORTS', 'TOOLS', and 'PROFILE'. The bottom right corner shows the user 'testing360'.

GROUP NAME	USER COUNT
<input type="checkbox"/> testing360	4

You can view the organization groups by clicking on the group names.



This screenshot is identical to the previous one, but the mouse cursor is now pointing at the group name 'testing360' in the table, indicating that it is being clicked to view the group details.

GROUP NAME	USER COUNT
<input type="checkbox"/> testing360	4

To view or edit the members in a group, click CHANGE MEMBERS.

GROUP NAME	USER COUNT
<input type="checkbox"/> testing360	4

You will be able to ADD MEMBERS and DELETE MEMBERS from the group.

	FIRST NAME	LAST NAME	USER NAME	ACCOUNT LOCKED
<input type="checkbox"/>	de	test	testing360	No
<input type="checkbox"/>	de	one	demoone@demo.com	No
<input type="checkbox"/>	de	three	demothree@demo.com	No
<input type="checkbox"/>	de	two	demo2@demo.com	No

STEP 7

MANAGE USER GROUP

Organize your users into groups to simplify the administration of training management. User Groups are intended to organize users with similar training needs into groups for the assignment of training plans and course enrollments.

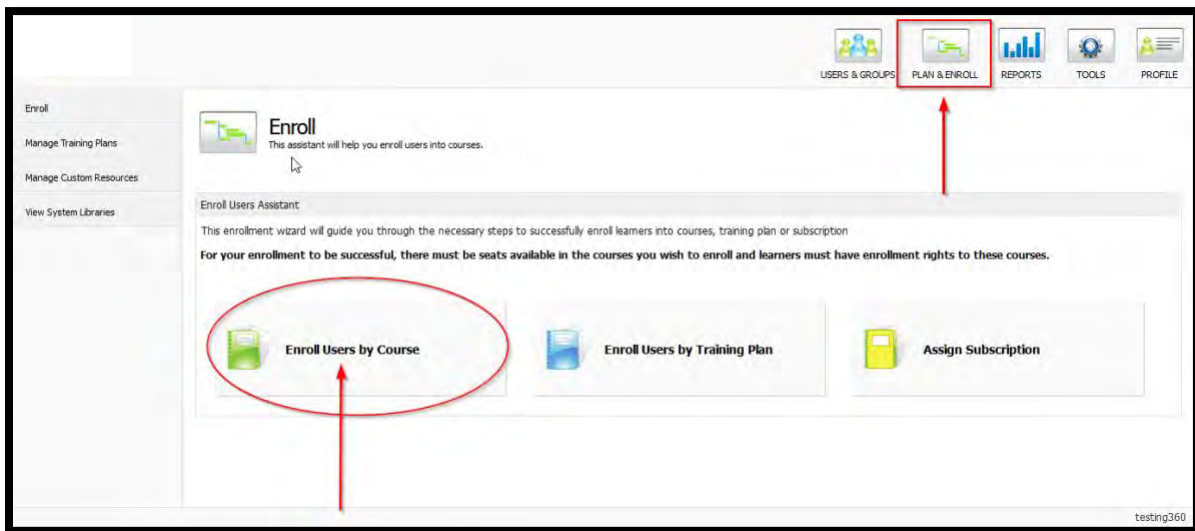
There are two options available: ADD USER GROUP or DELETE USER GROUP.



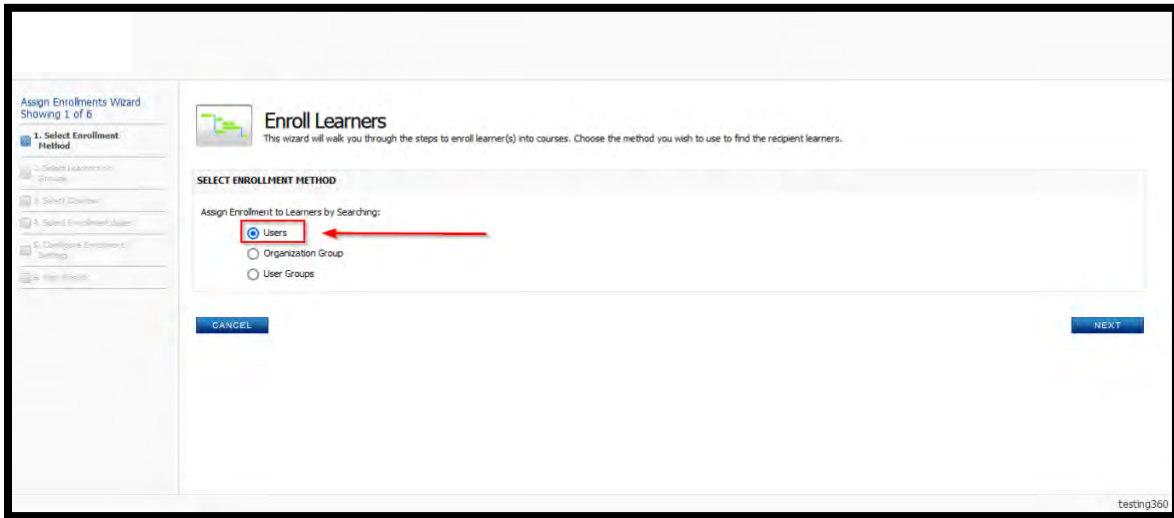
STEP 8

PLAN & ENROLL

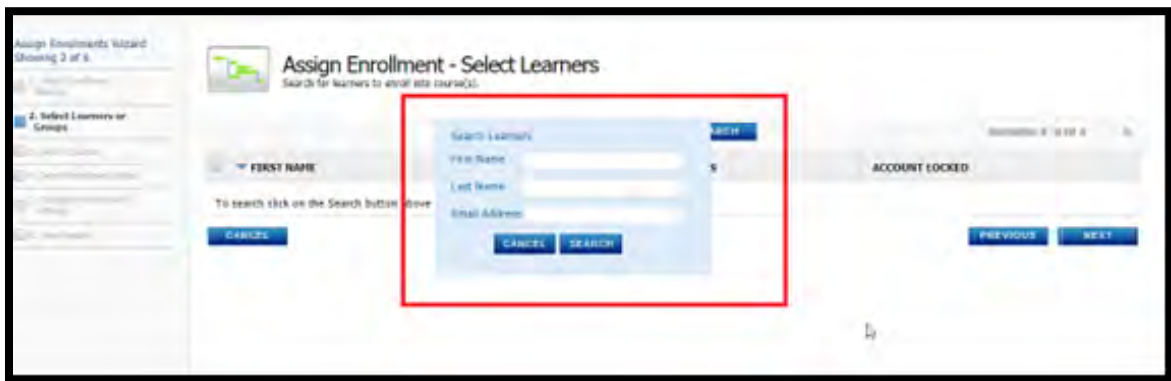
Select ENROLL USERS BY COURSE



Then select USERS.



You can search for the user you want to enroll by first name, last name, or email address.



SEARCH TIPS: Inadvertently adding a space at the end of a name or email address may cause the search to return unexpected results. Make sure there are no spaces after any text you type in search fields. You can also leave all the fields blank to search to see all the users in your account.

Select the user you want to enroll by clicking the box next to their name, then click NEXT.

Assign Enrollments Wizard
Showing 2 of 6

1. Select Enrollment Method
2. Select Learners or Groups
3. Select Courses
4. Select Enrollment Dates
5. Configure Enrollment Settings
6. View Results

Assign Enrollment - Select Learners

Select for learners to enroll into course(s).

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL ADDRESS	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	test@testdemo.com	No
<input type="checkbox"/>	demo	two	demo2@demo.com	No
<input type="checkbox"/>	demo	one	demoone@demo.com	No
<input type="checkbox"/>	demo	three	demothree@demo.com	No

testing360

Choose the course you want to enroll the user in by searching by course name:

Assign Enrollments Wizard
Showing 3 of 6

1. Select Enrollment Method
2. Select Learners or Groups
3. Select Courses
4. Select Enrollment Dates
5. Configure Enrollment Settings
6. View Results

Assign Enrollment - Select Courses

Select the courses you wish to enroll learners into.

SEARCH

SHOWING 0 - 0 OF 0

<input type="checkbox"/>	COURSE NAME	BUSINESS KEY	SEATS	USED	REMAINING	EXP. DATE	SUBSCRIPTION
No records found. Click on the search button to...							

testing360

Select the desired course from the results.

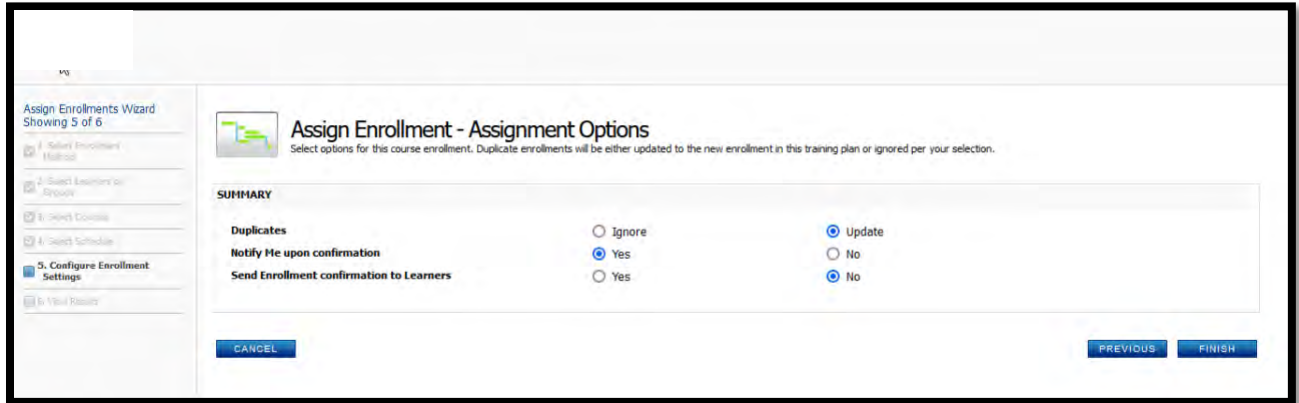
The screenshot shows the 'Assign Enrollment - Select Courses' interface. On the left is a navigation pane with steps: 1. Select Enrollment Method, 2. Select Learners or Group, 3. Select Courses (highlighted), 4. Select Enrollment Dates, 5. Configure Enrollment Settings, and 6. View Results. The main area has a title 'Assign Enrollment - Select Courses' and a subtitle 'Select the courses you wish to enroll learners into.' Below this is a search bar and a table of results. The table has columns: COURSE NAME, BUSINESS KEY, COURSE DESCRIPTION, TOTAL SEATS, USED, REMAINING, EXP. DATE, and SUBSCRIPTION. Two rows are visible, both for 'Learn2Serve: TABC Seller-Server Training' with business key 'PSALTX0417078'. The first row's description is 'Food and Beverage Programs->Food Handler Training->Texas' and the second is 'E-Commerce->Food and Beverage Programs->Food Handler Training'. Both have 'TOTAL SEATS' of 'DEMO for 360 Training - Unlimited', 'USED' of '0', 'REMAINING' of 'Unlimited', and 'EXP. DATE' of '02/29/2024'. There are 'CANCEL', 'PREVIOUS', and 'NEXT' buttons at the bottom. A 'testino360' watermark is in the bottom right.

COURSE NAME	BUSINESS KEY	COURSE DESCRIPTION	TOTAL SEATS	USED	REMAINING	EXP. DATE	SUBSCRIPTION
<input type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALTX0417078	Food and Beverage Programs->Food Handler Training->Texas	DEMO for 360 Training - Unlimited	0	Unlimited	02/29/2024	
<input type="checkbox"/> Learn2Serve: TABC Seller-Server Training	PSALTX0417078	E-Commerce->Food and Beverage Programs->Food Handler Training	DEMO for 360 Training - Unlimited	0	Unlimited	02/29/2024	

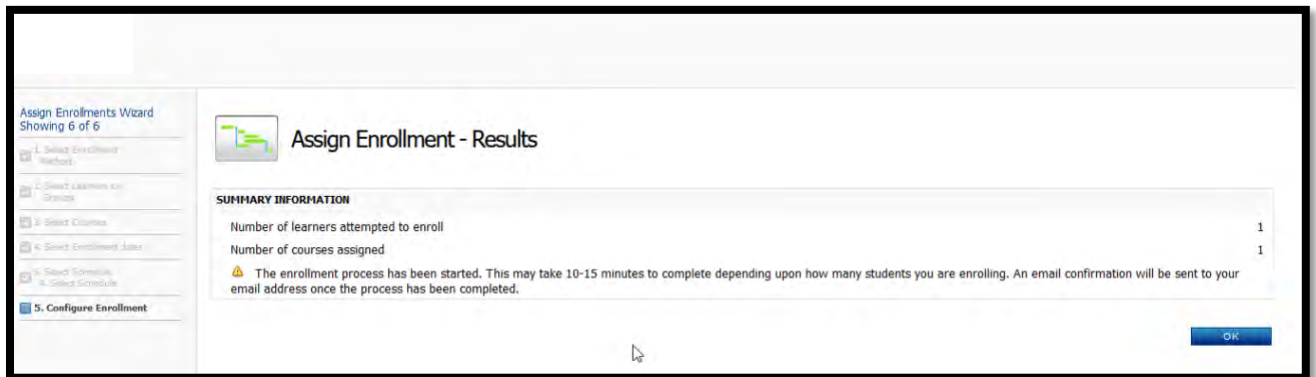
Next enter a start and end date for the course. The end date cannot be more than 365 days past the initial date of enrollment.

The screenshot shows the 'Assign Enrollment - Duration of Enrollments' interface. The left navigation pane has steps: 1. Select Enrollment Method, 2. Select Learners or Group, 3. Select Courses, 4. Select Enrollment dates (highlighted), 5. Configure Enrollment Settings, and 6. View Results. The main area has a title 'Assign Enrollment - Duration of Enrollments' and a subtitle 'The course start and end date specify when learners can access the course. You can drag and drop courses in the order it should display to your learners.' There are two radio button options: 'ALL COURSES' (selected) and 'INDIVIDUAL COURSES'. Under 'ALL COURSES', there are 'Start Date' and 'End Date' input fields with calendar icons, highlighted by a red box. Under 'INDIVIDUAL COURSES', there is a table with columns 'Start Date', 'End Date', and 'Contract End Date'. One row is visible for 'Learn2Serve: TABC Seller-Server Training' with 'Contract End Date' of '02/29/2024'. There are 'CANCEL', 'PREVIOUS', and 'NEXT' buttons at the bottom. A 'testino360' watermark is in the bottom right.

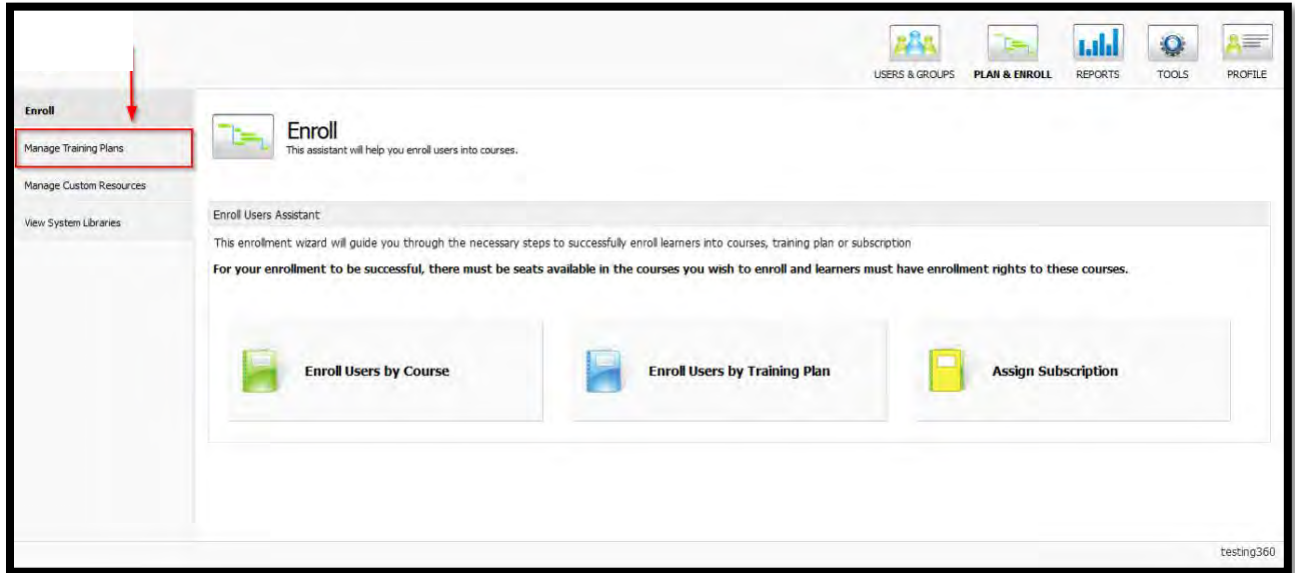
On the final screen of the training plan assignment, you can choose to Send Enrollment Confirmation to Learner by choosing YES. Click FINISH to complete the enrollment. You must click FINISH to ensure the course(s) is assigned.



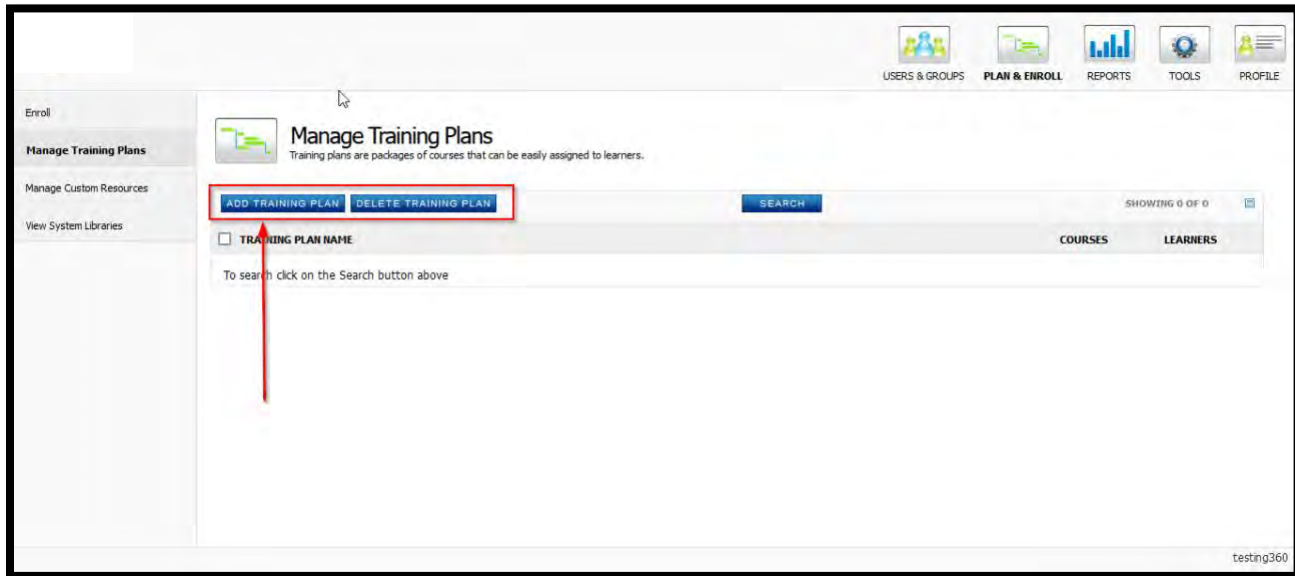
Once you've clicked "finish," you will see a confirmation screen confirming the enrollment was successful.



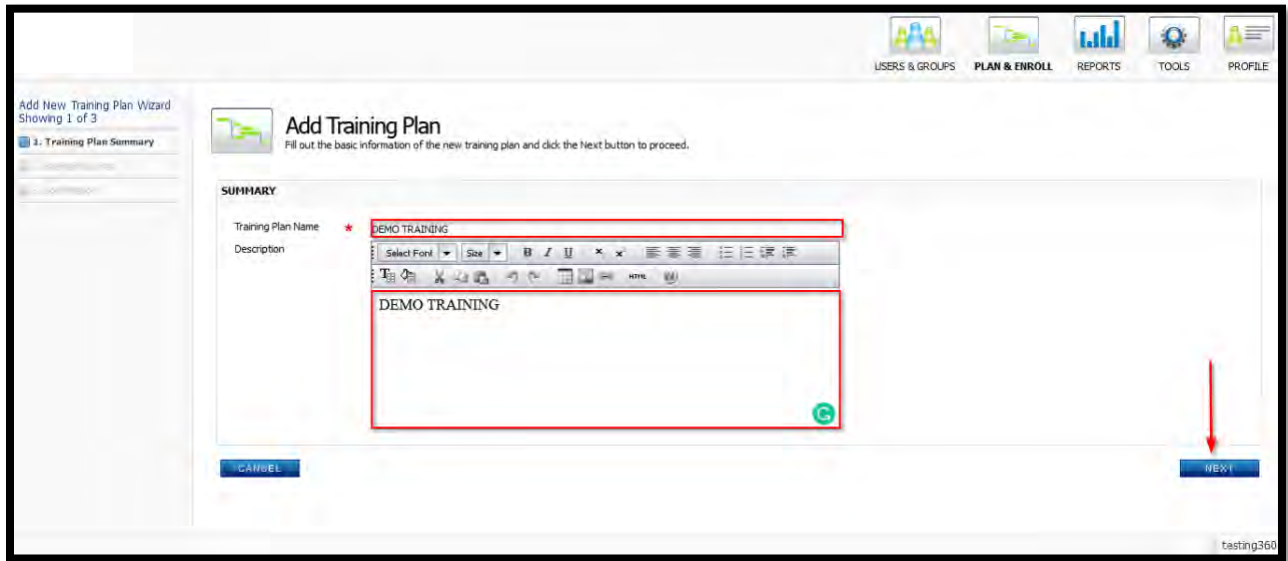
Select Manage Training Plans on the left-hand corner of the screen.



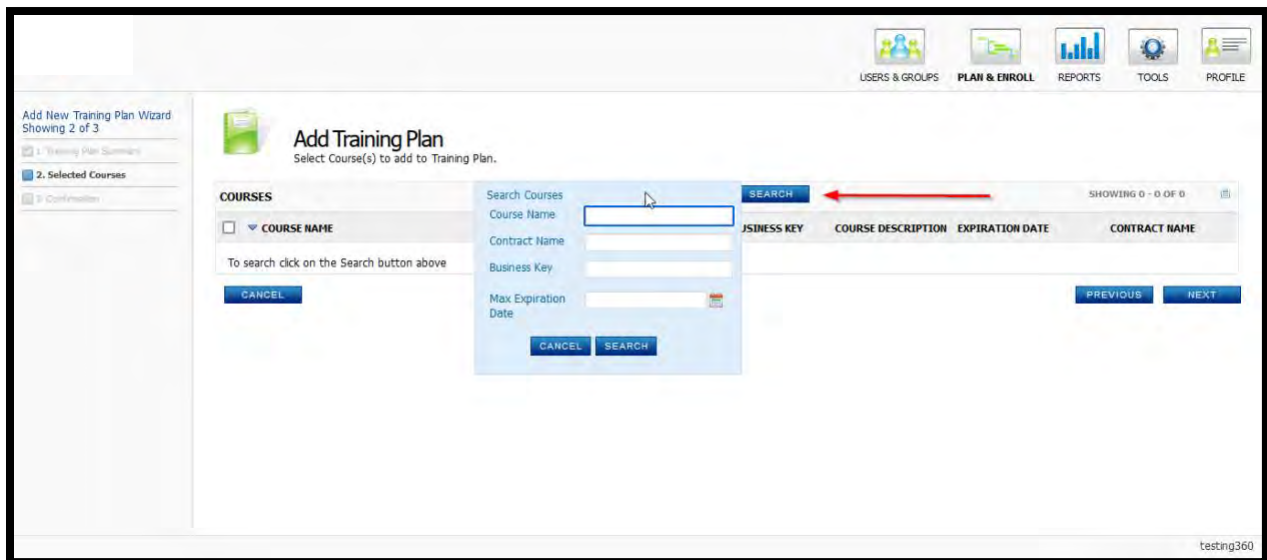
Add Training Plan



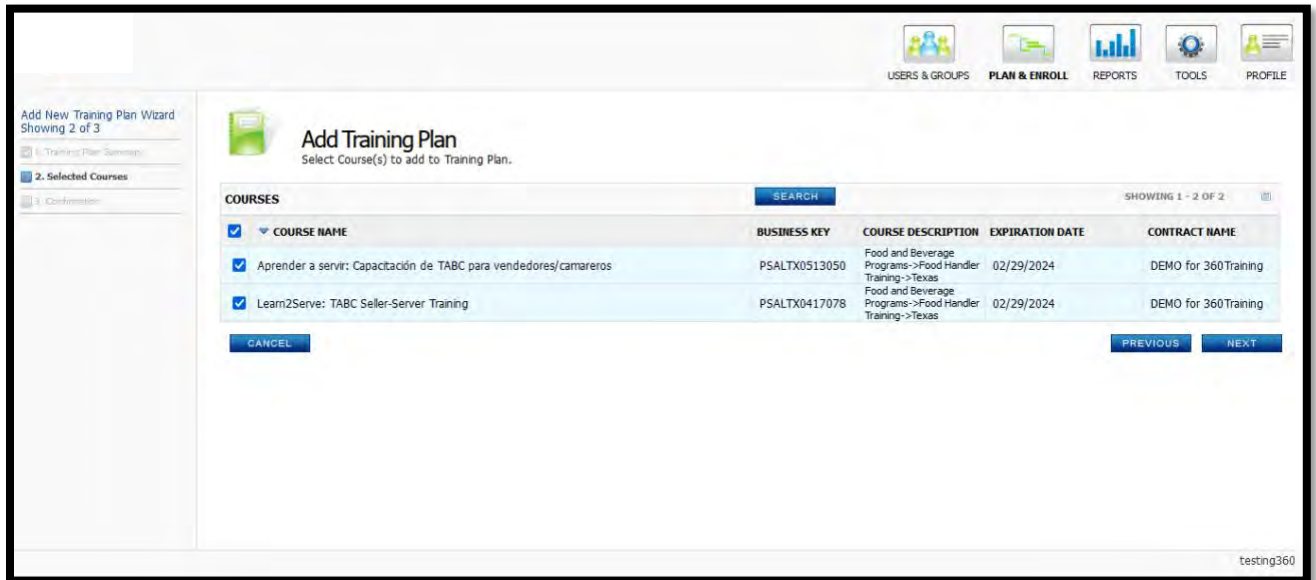
A new window will appear to fill out the basic information of the new training plan with **Training Plan Name** and **Description**. Click the **Next** button to proceed.



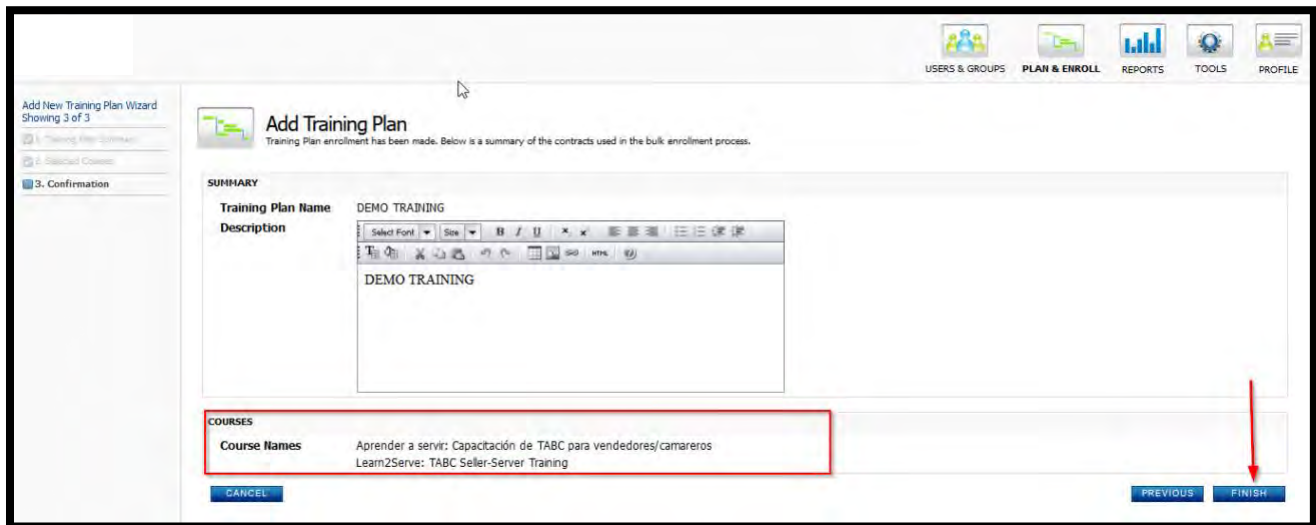
Click on the **“Search”** button and for search options by **Course Name, Contract Name, Business Key** and **Max Expiration Date**.



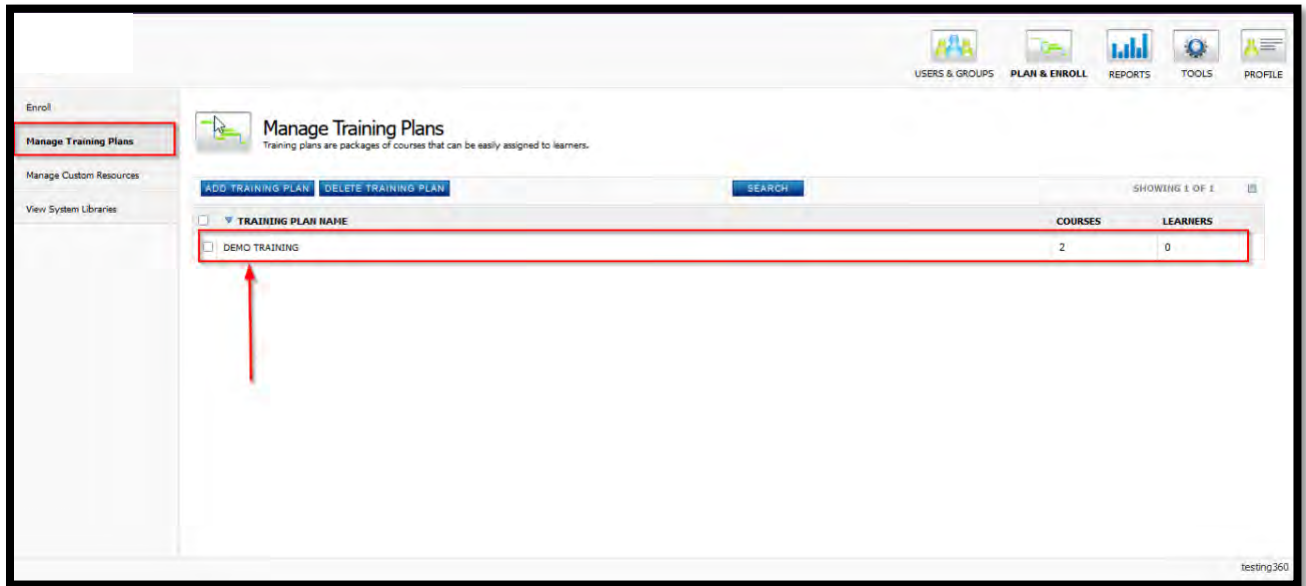
Now just do a blank Search and all the courses available in your contract/entitlement will appear. Select the desired courses to add in the training plan and click next.



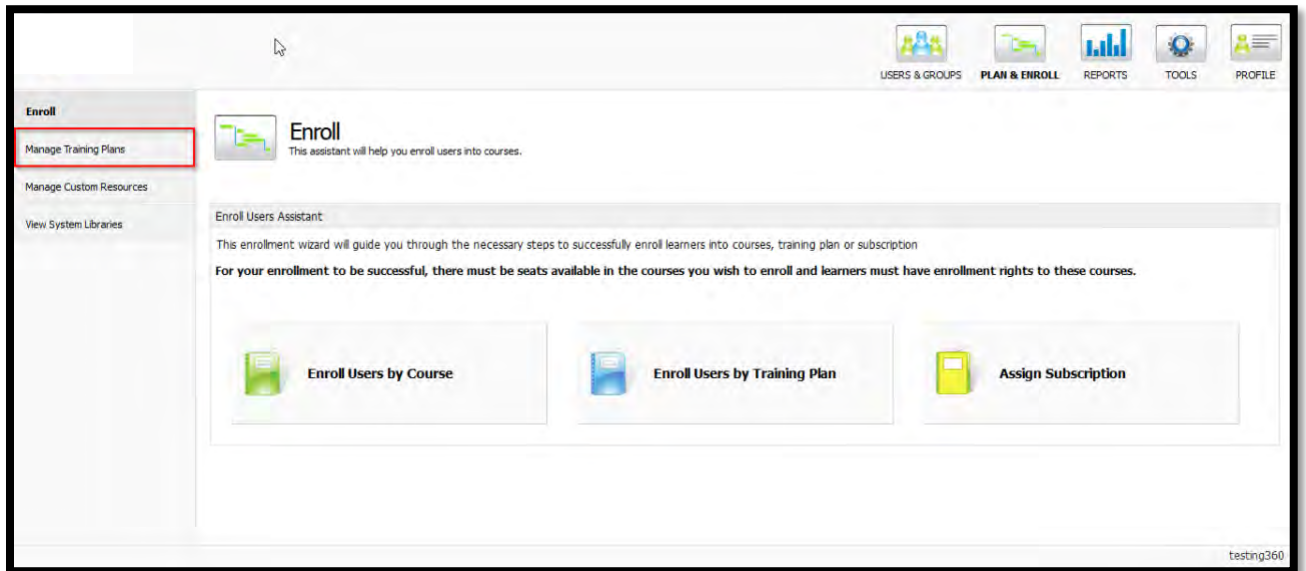
Training Plan enrollment is done. Below is a summary of the contracts/entitlements used in the training plan setup process. Once ready to proceed with the training plan, click finish.



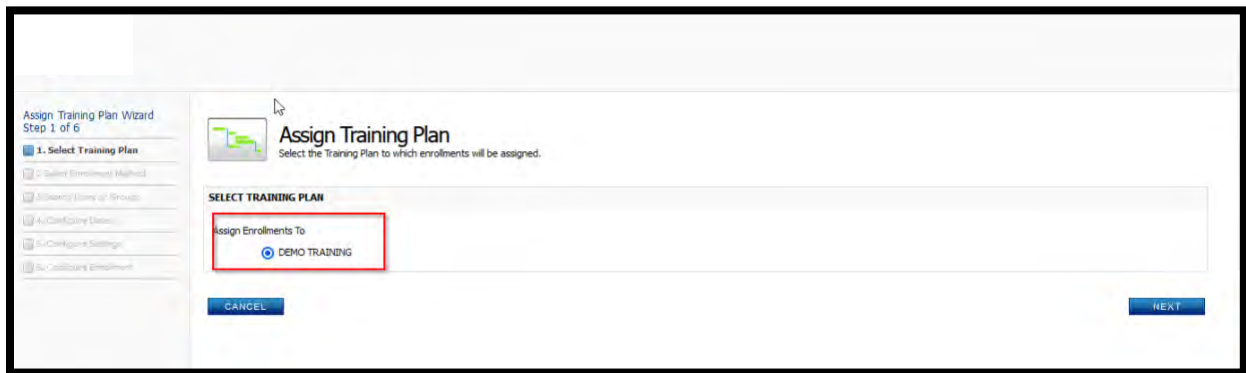
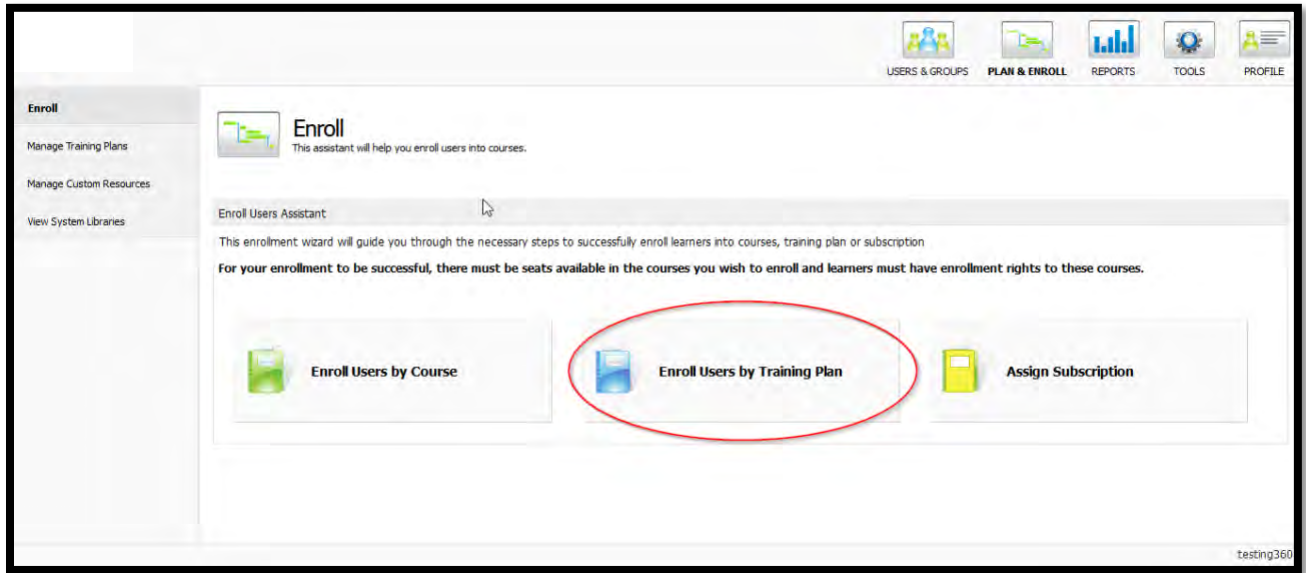
Now again click on Manage training plans and click the search button to view the new training plan created or any previous training plans created.



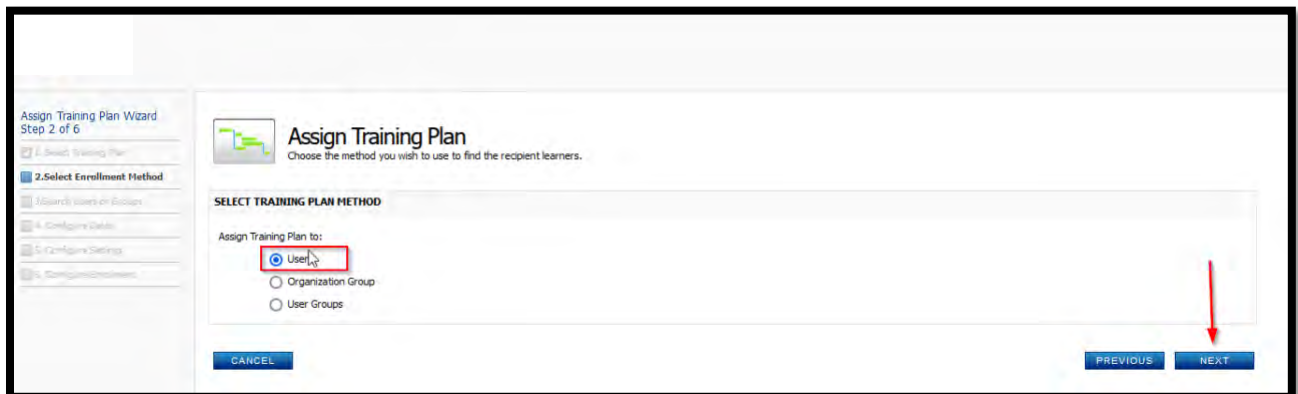
Select ENROLL USERS BY TRAINING PLAN



Then select the desired training plan.



After selecting a training plan, there are three options: You can assign a training plan to a USER, ORGANIZATION GROUP or USER GROUP.



Selecting ORGANIZATION GROUP

Assign Training Plan Wizard
Step 3 of 6

1. Select Training Plan
2. Select Enrollment Method
3. Search Users or Groups
4. Configure Class
5. Configure Settings
6. Compare Enrollments

Assign Training Plan - Select Learners

Search for learners to enroll into course(s).

SEARCH

SHOWING 1 - 1 OF 1

<input type="checkbox"/>	FIRST NAME	LAST NAME	USER NAME	SECURITY ROLE	ACCOUNT LOCKED
<input type="checkbox"/>	demo	test	testing360	LEARNER	No

CANCEL PREVIOUS NEXT

After clicking NEXT, assign the start date and end date.

Assign Training Plan Wizard
Step 4 of 6

1. Select Training Plan
2. Select Enrollment Method
3. Search Users or Groups
4. Configure Dates
5. Configure Settings
6. Compare Enrollments

Assign Training Plan - Duration

Select the Start Date and End Date of your training plan. You can drag and drop courses in the order it should display to your learners.

SELECT DATES

Start Date → 03/01/2023

End Date → 03/15/2023

TRAINING PLAN COURSES	CONTRACT NAME	EXPIRATION DATE
➤ Aprender a servir: Capacitación de TABC para vendedores/camareros	DEMO for 360Training	02/29/2024
➤ Learn2Serve: TABC Seller-Server Training	DEMO for 360Training	02/29/2024

CANCEL PREVIOUS NEXT

The following two steps are default actions. We recommend continuing with the system options as they are selected.

Email will be received as a confirmation of LMS Enrollment Results.

LMS Enrollment Results

360training.com Support <support@360training.com>
To: Rana Awais Javed

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

This Message originated outside your organization.

Assign Enrollment - Results

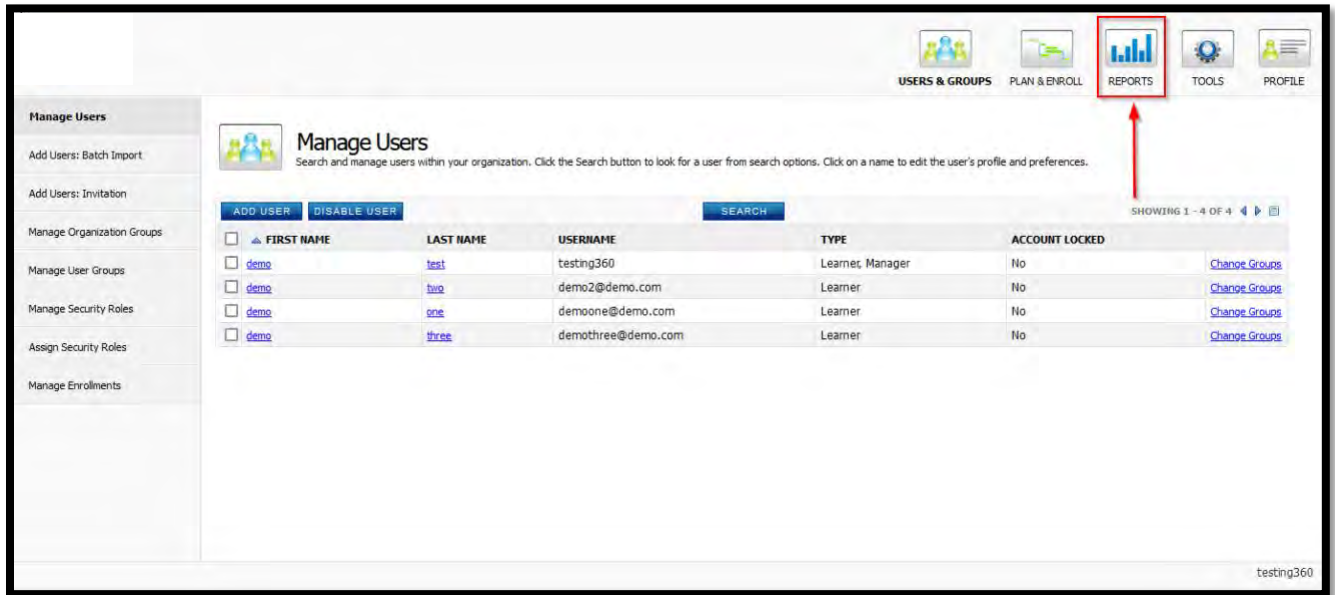
The enrollment process has been completed. Below is a summary of assignments.

Summary Information	
Number of learners attempted to enroll	1
Number of learners enrolled successfully	0
Number of courses assigned	0
Total number of enrollments created	0
Number of errors encountered	0

STEP 9

REPORTS – Tracking progress via On-Demand Reports

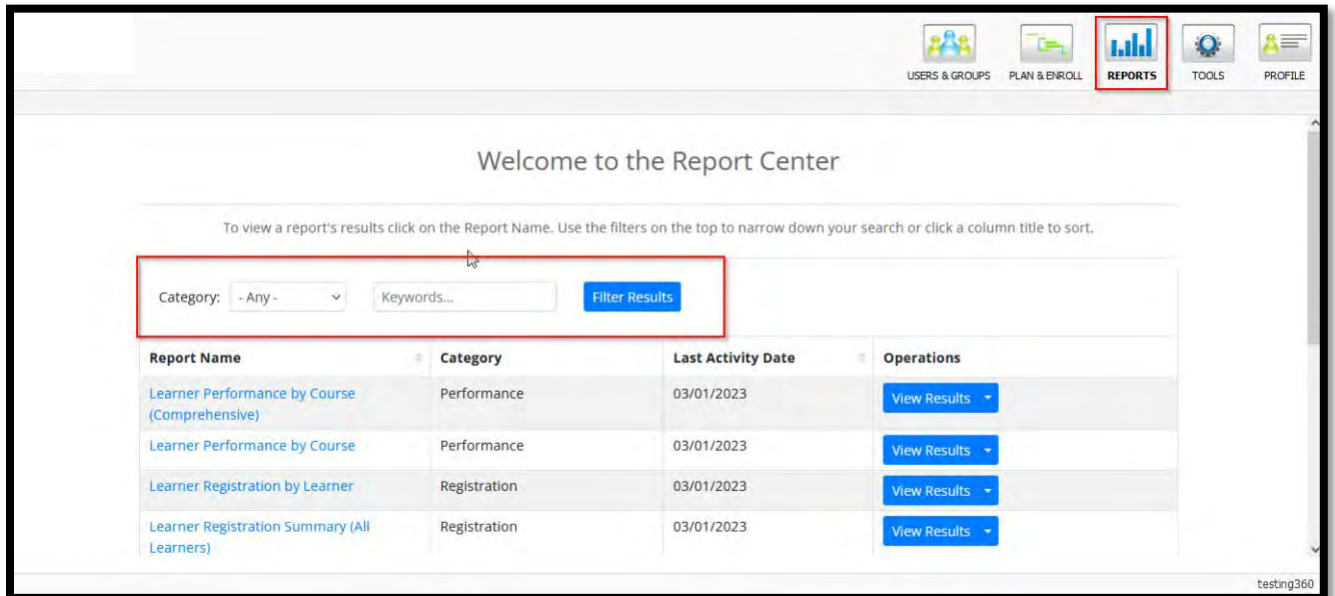
Once logged in, select REPORTS in the top right corner of the screen.



The screenshot shows the 'Manage Users' interface. In the top right navigation bar, the 'REPORTS' icon (a bar chart) is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'Manage Users' section is visible, featuring a search bar and a table of users. The table has columns for 'FIRST NAME', 'LAST NAME', 'USERNAME', 'TYPE', and 'ACCOUNT LOCKED'. The users listed are 'demo' (test), 'demo' (two), 'demo' (one), and 'demo' (three).

<input type="checkbox"/>	FIRST NAME	LAST NAME	USERNAME	TYPE	ACCOUNT LOCKED	
<input type="checkbox"/>	demo	test	testing360	Learner Manager	No	Change Groups
<input type="checkbox"/>	demo	two	demo2@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	one	demoone@demo.com	Learner	No	Change Groups
<input type="checkbox"/>	demo	three	demothree@demo.com	Learner	No	Change Groups

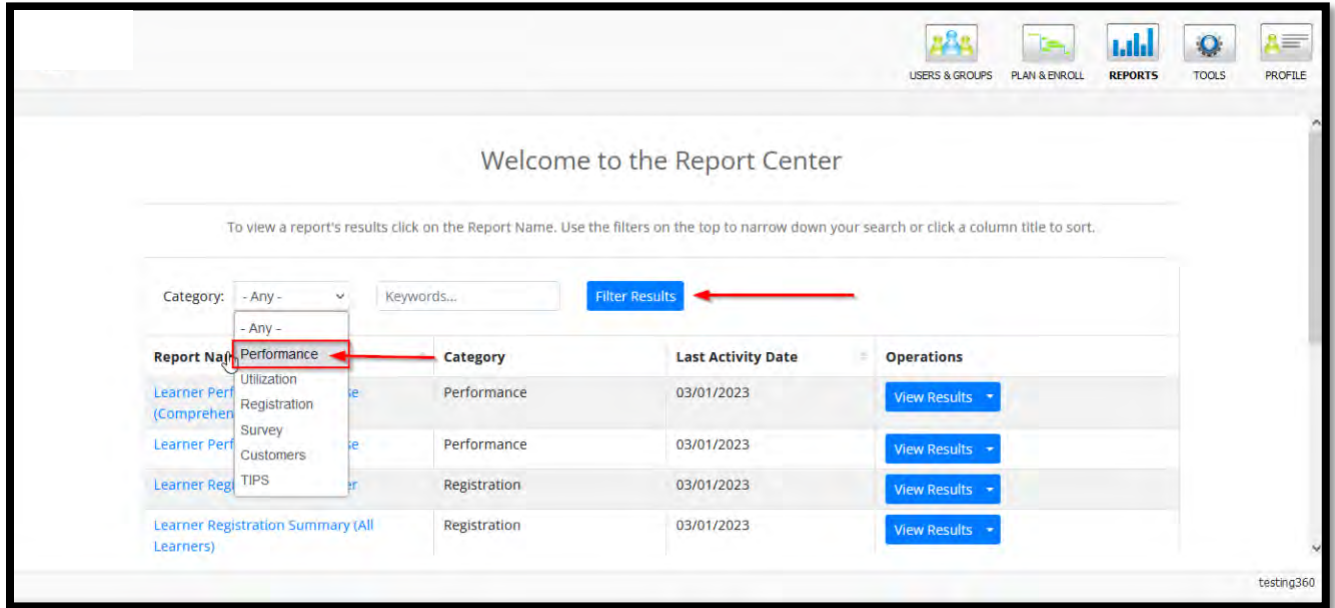
From here, you can filter between different types of reports.



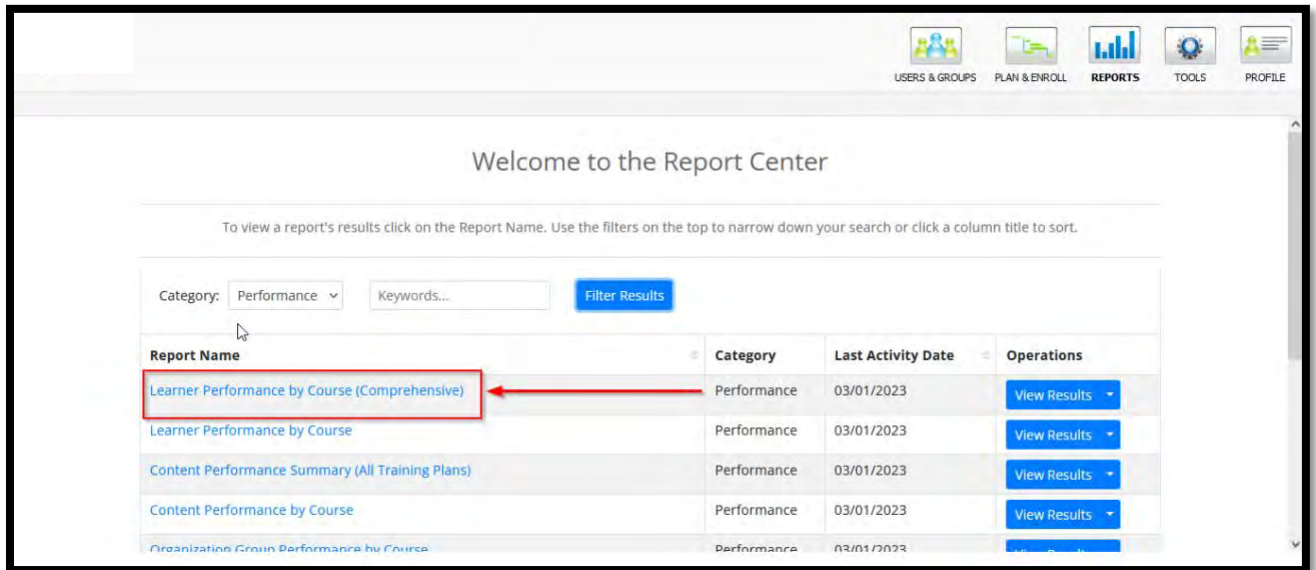
The screenshot shows the 'Report Center' page. At the top, it says 'Welcome to the Report Center'. Below this, there is a filter section with a dropdown menu for 'Category' (set to '- Any -'), a text input for 'Keywords...', and a 'Filter Results' button. A red box highlights these filter controls. Below the filter section is a table of reports.

Report Name	Category	Last Activity Date	Operations
Learner Performance by Course (Comprehensive)	Performance	03/01/2023	View Results
Learner Performance by Course	Performance	03/01/2023	View Results
Learner Registration by Learner	Registration	03/01/2023	View Results
Learner Registration Summary (All Learners)	Registration	03/01/2023	View Results

The “Learner Performance by Course (Comprehensive)” report is the most useful report for most managers. This report can be found by filtering by PERFORMANCE in the CATEGORY drop-down box and then pressing FILTER RESULTS.

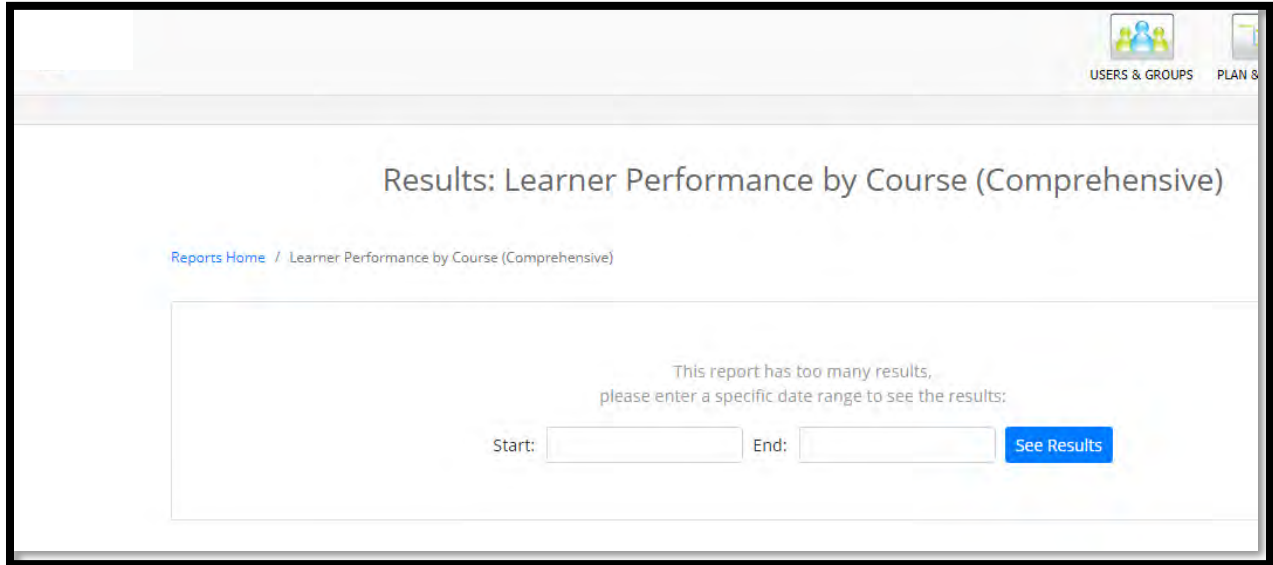


To run the report, click on the report name.

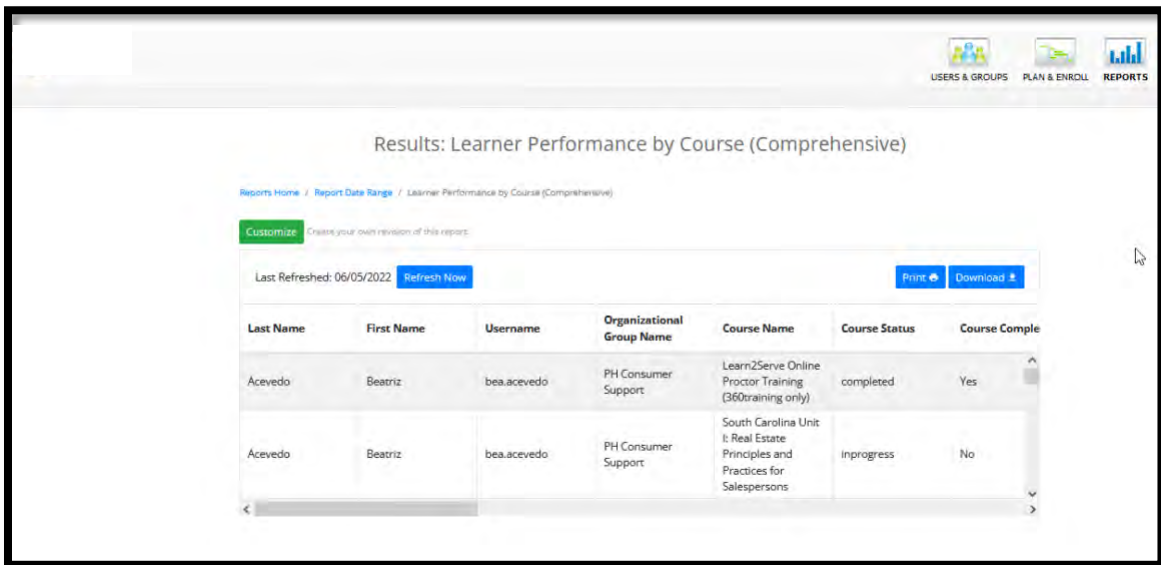


Select the date range you want the report to cover and click SEE RESULTS.

NOTE: Make sure to set a start date far enough back to capture the enrollment date of all the users you would like to review. For example, running a report from 1/1/22 – 6/30/22 will not include any users who were enrolled in 2021.



Once the report is completed, you will see the results on the page. From here, click DOWNLOAD to receive the report as an Excel file.

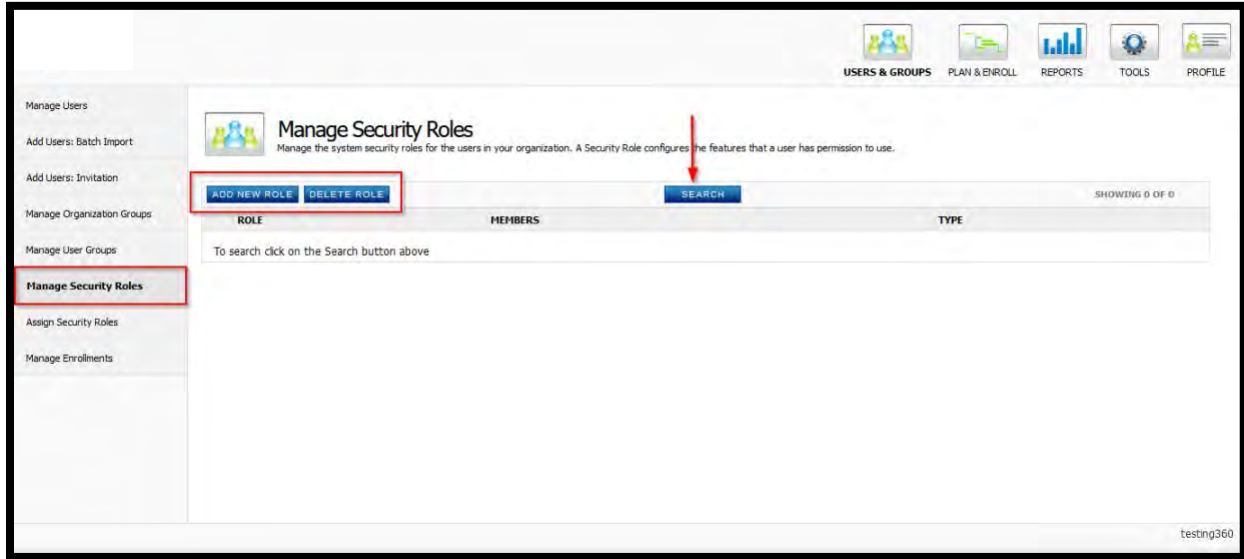


STEP 10

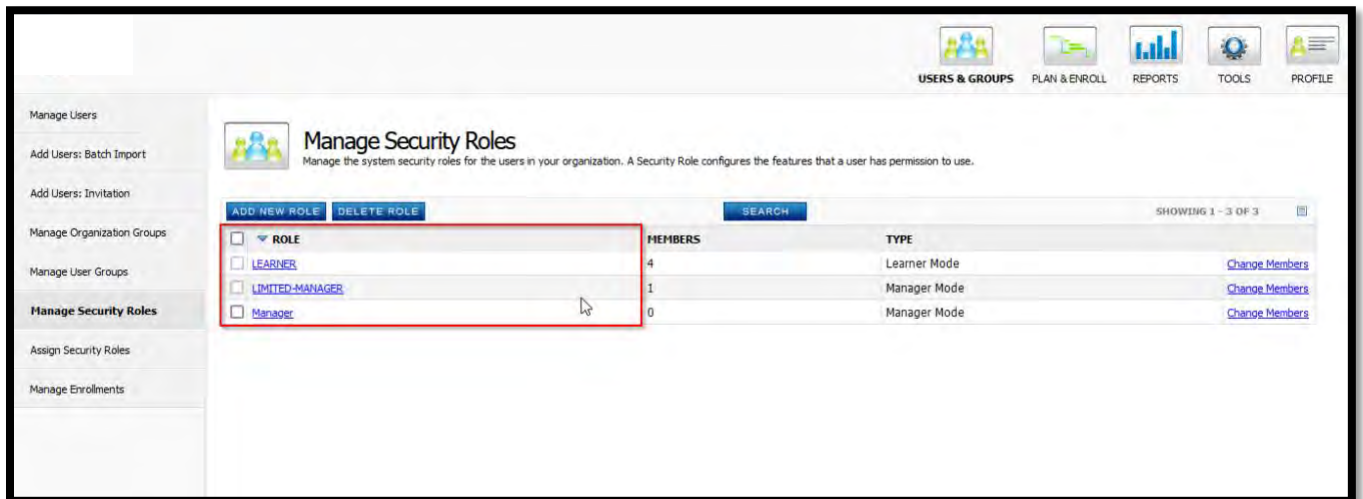
MANAGE SECURITY ROLES

Manage the system security roles for the users in your organization. A Security Role configures the features that a user has permission to use.

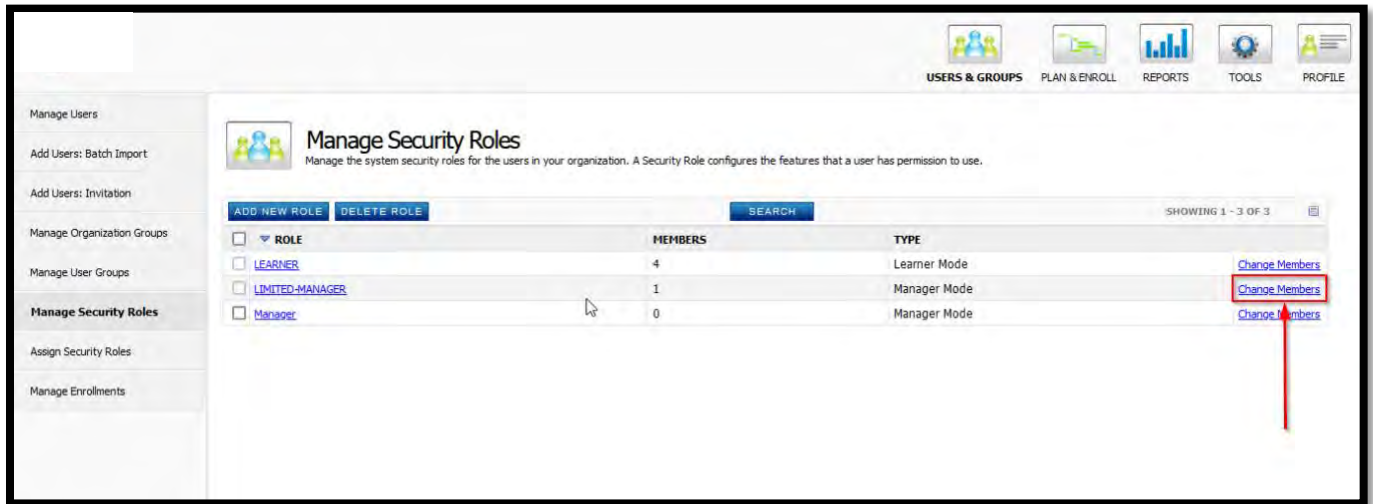
You can add a new role or delete a role by clicking SEARCH. This will allow you to view the security roles.



Manage the permission settings of a security role. Your organization may have one **default Learner Security Role** that all newly registered users will have as their Learner role by default.



Clicking on CHANGE MEMBERS will allow you to view the users in the assigned role or remove the learner in the same step.



Clicking on the SECURITY ROLE will allow you to view the enabled permissions. These permissions apply to Users & Groups, Plan & Enroll, Reports, and Tools tabs.

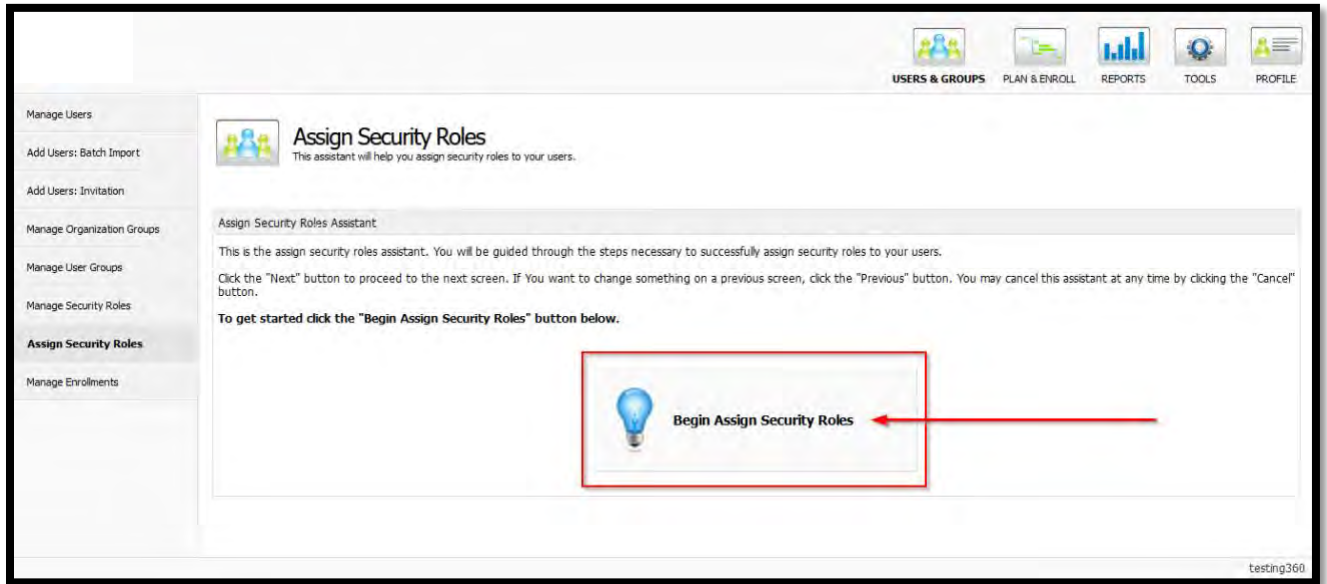


STEP 11

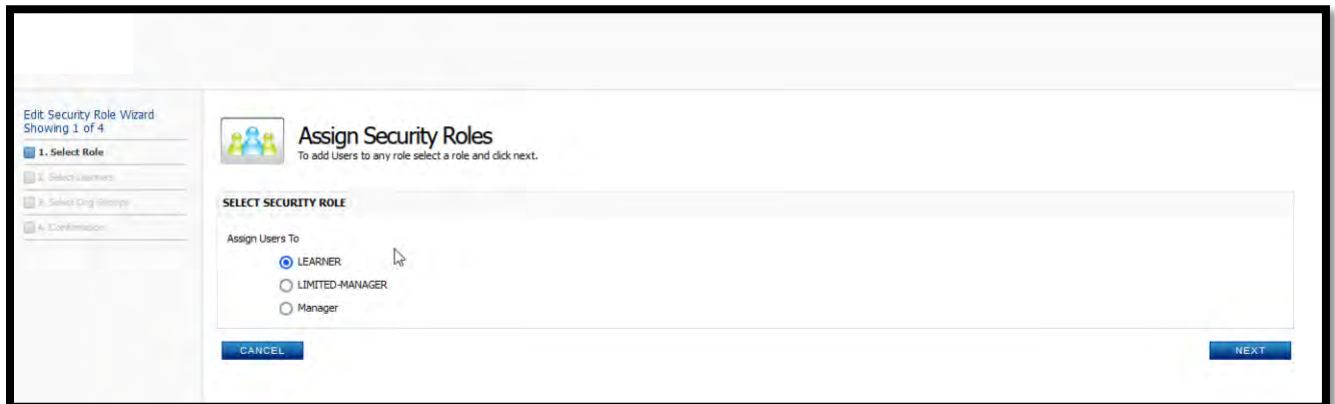
ASSIGN SECURITY ROLES

This is the Assign Security Roles assistant. You will be guided through the steps necessary to assign security roles to your users successfully.

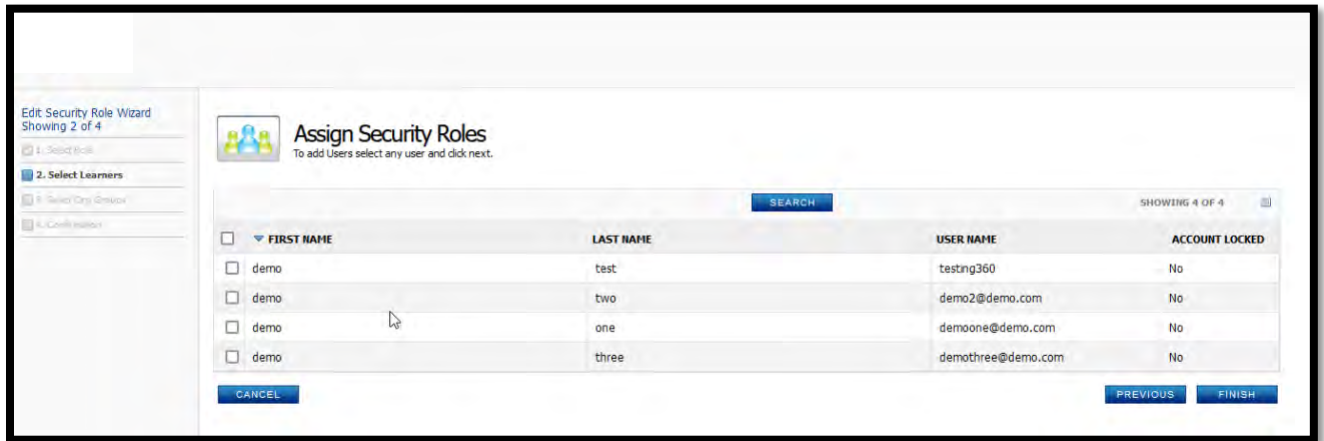
To get started, click BEGIN ASSIGN SECURITY ROLES link at the bottom of the screen.



Click NEXT to proceed. If you want to change something on a previous screen, click PREVIOUS. You may cancel the assistant at any time by clicking CANCEL.



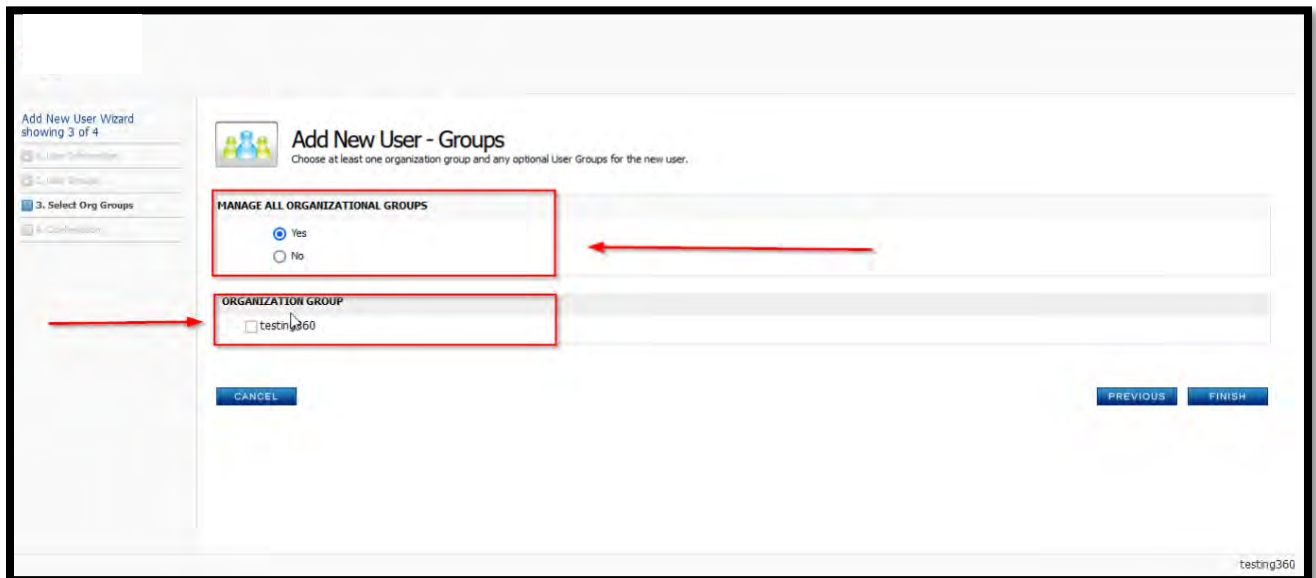
Search for a user you want to assign as a Learner or Manager.



Choose at least one organization group and any optional User Groups for the new user.

NOTE:

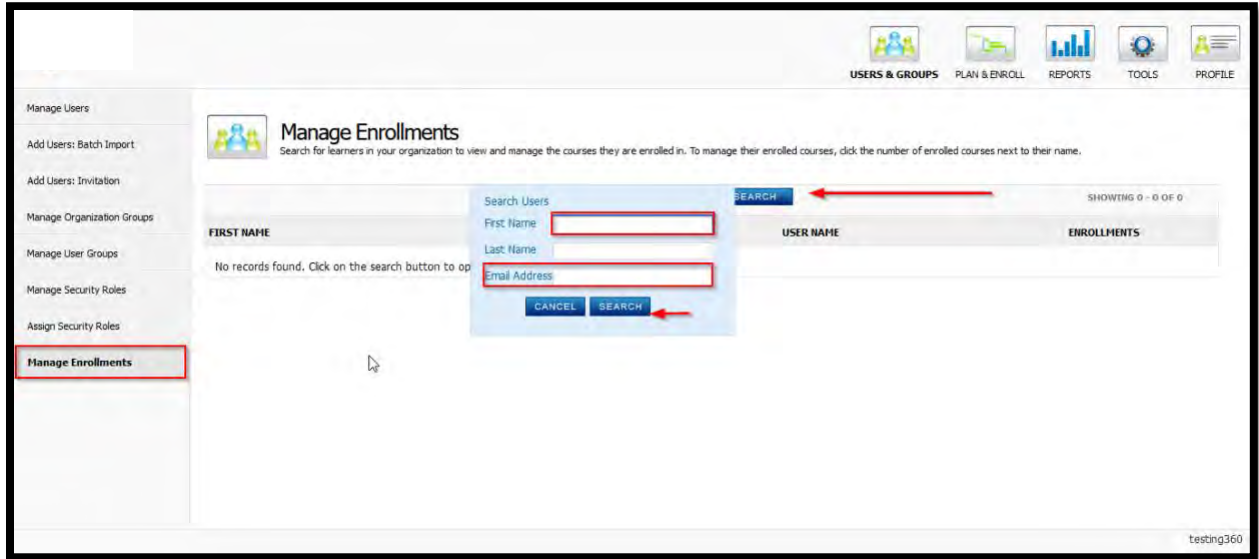
- If you choose "Yes," it will give that user access to manage all organization groups and users.
- If you choose "No," you must select one organization group to which you want the user to be added.



Click FINISH and a confirmation window will appear.

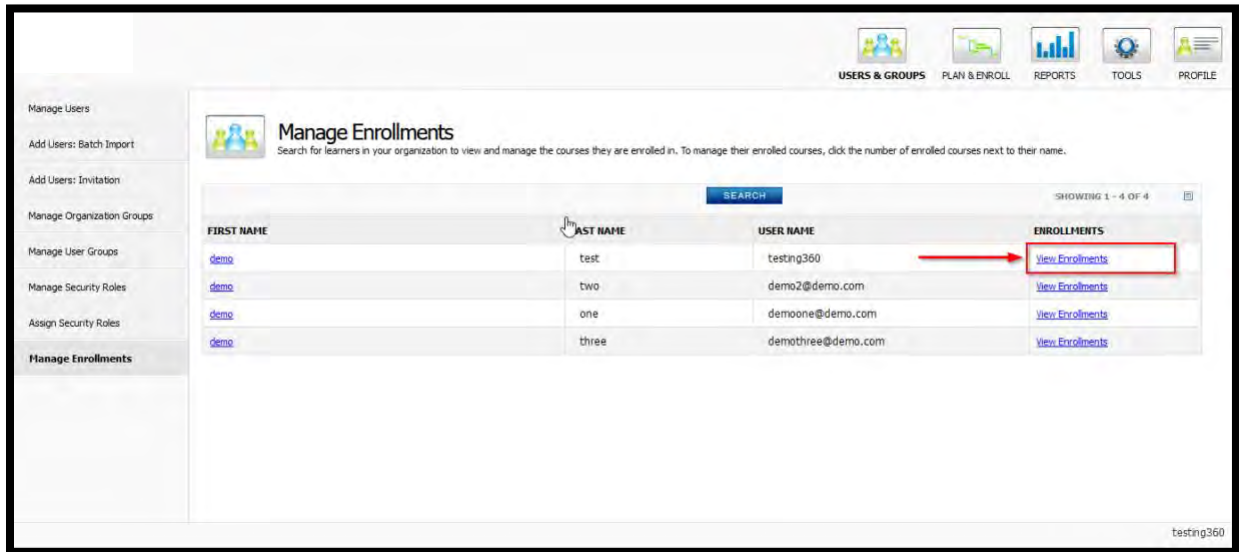
STEP 12 MANAGE ENROLLMENTS

Search for learners in your organization to view and manage the courses they are enrolled in. To manage their enrolled courses, click the number of enrolled courses next to their name.



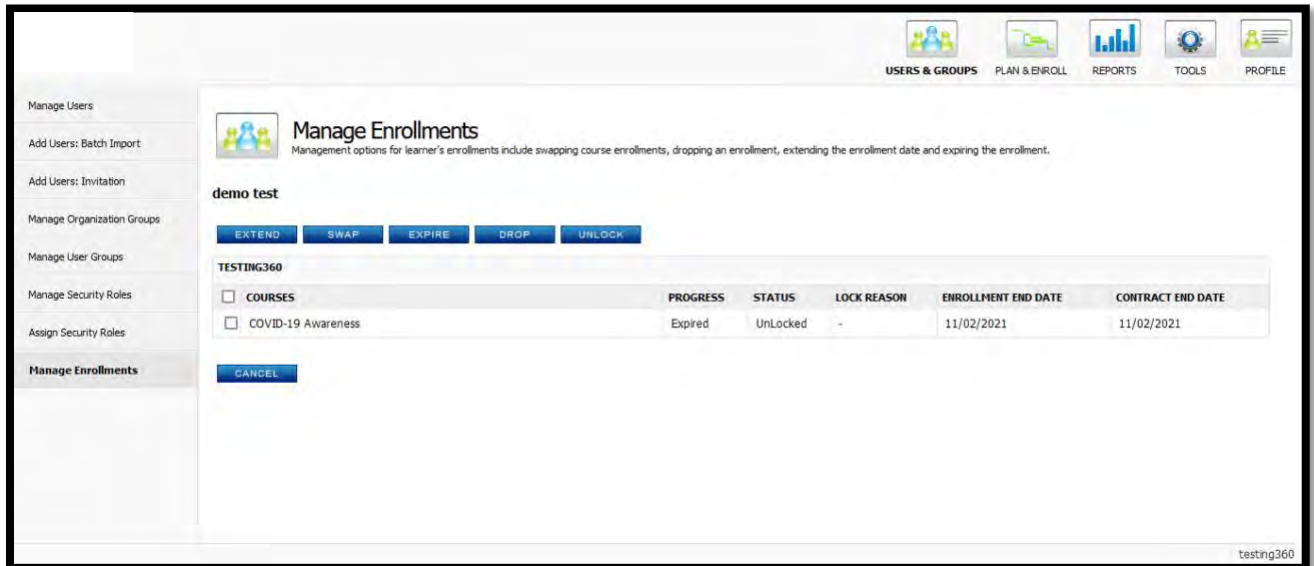
If you leave all fields blank and click SEARCH, you can view all the users listed under your customer account.

Click VIEW ENROLLMENTS.



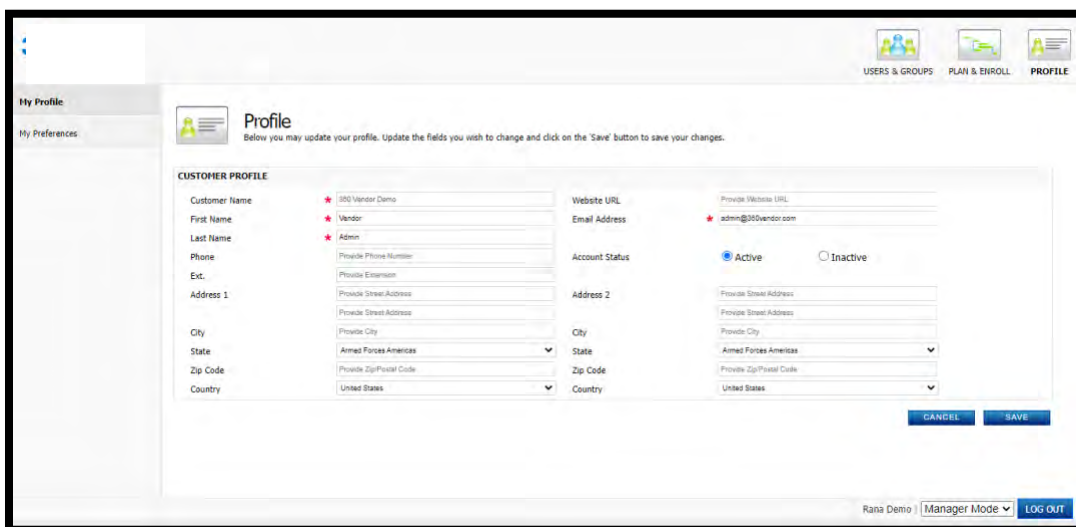
Now you can view the following columns: courses, progress, status, lock reason and enrollment end/start date. You then have the options to:

- Extend a Course (within the timeframe allowed in the entitlement)
- Swap a Course (we recommend not using this option)
- Expire a Course (this is most helpful for cases where the user failed all the attempts in a course exam and the course status still shows in-progress which doesn't allow a new course to be added until the status shows expired)
- Drop a Course (if the wrong course was assigned or the employee is no longer with the company and the course hasn't been completed)
- Unlock a Course (If a course is locked, the user will most likely require customer support's assistance)

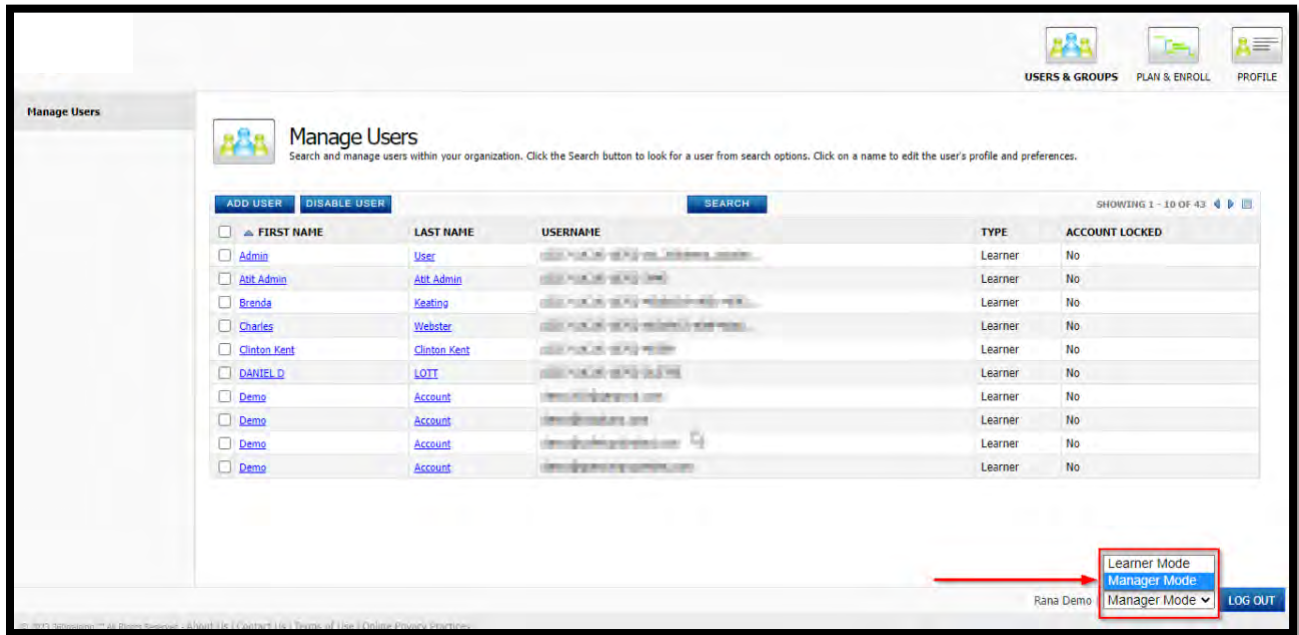


Profile

After clicking on profile, you will view the customer account profile information.



The bottom right-hand side of the screen allows you to switch between manager and learner mode. In case you are required to take a course or if you would like to update your profile information.



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