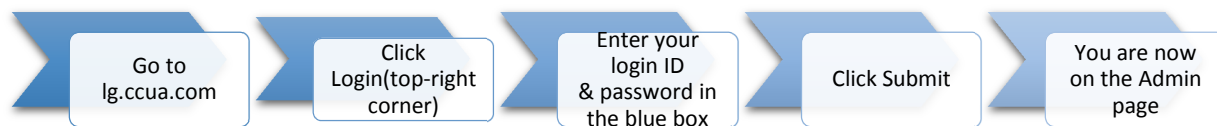


This credit union administrator guide will walk you through the primary functions administrators will perform on the Learning Gateway.

Logging In



Admin Page

The Admin page is your control panel in the Learning Gateway. It provides quick links to view and complete transactions, manage users, run reports, and view individual user records.



Users

The Users page shows you all of the users registered under your credit union. From this page you can create and approve new accounts, archive accounts that are no longer needed, and edit learner profiles.






Creating and Editing Learner Accounts

To Create a New Account




1. On the **Users page**, click .
2. The **Login ID** is a unique email address that the learner will use to access the Learning Gateway.
3. The **password** must be at least 6 characters long and contain at least 1 number and at least 1 special character. *For example: password5!*
4. The **email address** is used to communicate with the learner. While it is often the same as the Login ID, it can be different if someone chooses to receive emails at a different address.
5. The **time zone** feature allows learners to see webinars and eClassroom sessions listed in our catalogue at an appropriate time for them.
6. The default **mailing address** is your credit union's head office. This can be changed by unchecking the box and entering in new address information.



7. After entering a **daytime work number** for the learner, please be sure to check the **upcoming emails** acceptance box so that your learners are kept up to date all of the training we have to offer. This feature can be edited at any time by the administrator or the learner. 
8. Click  and the account will be created.
9. **Director Accounts:** When first created, all accounts are by default set up as Employees. To change an account to a director's account:
 - i. Click on the  **Role** tab.
 - ii. Click the  icon.
 - iii. Choose the Director job position from the drop-down menu.
 - iv. Click .
10. Once the account has been created, the learner will receive a verification email confirming the creation of their account.

To Edit a Learner's Account: Click on the person's name or the  icon to access the profile.



To Archive a Learner's Account

1. Click on the **Users page**.
2. Click on the , under **Operations**, for the user you wish to archive. It will be removed from your list of users. *To retrieve an archived account, contact [Client Solutions](#).*

New Account Approvals


If a learner has created an account on his or her own, but did not use their credit union email address, the CU administrator will receive an email asking to approve the new account.

To Approve a Learner Account

1. Click on the **Users page**.
2. Learners pending approval will appear in **red**.
3. Click on the stoplight icon:  to activate the user. The stoplight will turn green:  indicating the user is now approved.



To Deny a Learner Account

3. Click on the **Users page**.
4. Learners pending approval will appear in **red**.
5. Click on the  to archive the account. It will be removed from your list of users. *To retrieve an archived account, contact [Client Solutions](#).*




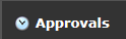


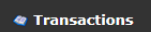
Ecommerce

The Ecommerce page is accessed from the Admin tab. Here you can manage registration approvals, register learners, see all transactions and more.

Approving Registrations





Approvals

1. Click the  button.
2. Learners' registrations with pending approvals will appear here, in the  tab.
3. On the right-hand side, select all the registrations you wish to edit.
4. In the bottom left-hand corner, use the buttons to either accept () or reject () the selected registrations.
5. All registrations will be visible in the  tab.

Transactions



Transactions

The Transactions page (accessible from the Ecommerce page) provides a comprehensive listing of all transactions conducted by your credit union's users. This list includes course that are pending, approved, cancelled, and refunded. As an administrator, you can **cancel courses** on this list by clicking on the  . A complete list of transactions can be exported for any date range by clicking  Export to CSV .



Batch Registration


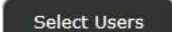




Batch Registrations




There are two simple ways to use the batch registration module: using the simple interface to select users and courses manually, or using the upload form for higher registration volumes.

You can register one learner into one activity, one learner into multiple activities, multiple learners into one activity, or multiple learners into multiple activities as long as they are the same.

Using the Simple Interface

1. Click on the **Batch Registration** button, on the Ecommerce page.
2. Select the courses for which you want to register your users. 
3. Click on the **Select Users** tab and then, select the users you would like to register. 
4. Click the **Checkout** tab, then click **Calculate**.  
5. Review the new assignments and existing assignment lists to see which users are already registered.
6. Purchase with your group account to enroll your learners.

Using the Upload Form

1. Using Microsoft Excel, create a .csv file listing the login IDs for the learners you wish to register, in column A, as shown. *This must be a .csv file, not an .xls file.*
2. Click on the **Batch Registration** button, on the Ecommerce page.
3. Select the courses for which you want to register your users.
4. Click  **Upload User List** at the top of the page and select your already saved .csv file.
5. Click the **Checkout** tab, then click **Calculate**.  
6. Review the new assignments and existing assignment lists to see which users are already registered.

	A
1	LOGIN ID
2	employee1@creditunion.ca
3	employee2@creditunion.ca
4	employee3@creditunion.ca
5	employee4@creditunion.ca
6	
7	

.csv file example



7. Click on the **Suppress emails** box if you do not wish your employees to receive the system generated Course Registration Confirmation email.



8. Purchase with your group account to enroll your learners.

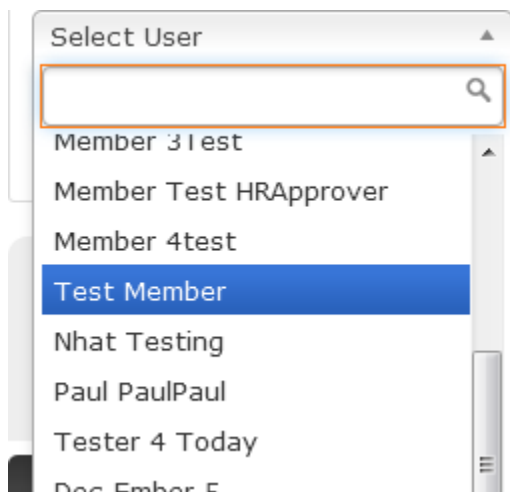
A handy feature of the new Learning Gateway is its intuitive response to duplicate registrations. After clicking calculate, if users have already been enrolled in the course you selected, you find out immediately, before paying for registrations. These users will not be included in the batch registration.

Viewing User Courses

This tool allows you to quickly peek into a user's training record. You can see all completed, registered, and in progress courses as listed on a learner's profile under their My Courses section. You can view one user's profile at a time.

To view a user's courses

1. Select a user from the **Select User** dropdown list




- Click on the **SUBMIT** button to see a list of completed, registered, and in progress courses for the selected user.
- To save or print a copy of the list, click on **Export to PDF**.

Filter Courses

Keyword Activity Type Status Start Date End Date **SEARCH**

My Courses

Export to PDF:  [+] Expand all [-] Collapse all

COURSE TYPE	Course Title (Category)	Status	Dates (Registration Date) (Start Date) (End/Completion Date)
Curriculum	[+] 2014 Administrative Professionals Virtual Conference (CUSOURCE \ 5. Online Training Sessions/Webinars)	Registered	Registered: 2014-03-28
ILT	[+] CUIC 346 Self-Study June 2014 Exam-Antiquish NS (CUIC-346-AGLE05-SLS-EXM18Jun14ANT) (CUSOURCE \ 4. CUIC® Courses and Programs \ 4.1 Courses)	Registered	Registered: 2013-12-05 Exam Date: 2014-06-18 Location: St. Francis Xavier University
ILT	[+] Business Lending 2nd Edition - Self Study (CUIC-345-BSLNE02-SLS) (CUSOURCE \ 4. CUIC® Courses and Programs \ 4.1 Courses)	In progress	Registered: 2013-12-12 Started: 2013-12-12
eLearning	[+] Combating Cheque Fraud (EHP-LVF-CMCFE01-FLB) (CUSOURCE \ 2. eLearning Course Catalogue \ 2.2 Compliance-Risk Management)	Registered	Registered: 2013-12-05
eLearning	User License for Anti-Money Laundering and Counter-Terrorism Financing - 2014 (AML-LVF-PLTME03-LCN) (CUSOURCE \ 2. eLearning Course Catalogue \ 2.2 Compliance-Risk Management)	Registered	Registered: 2014-03-28

Reporting Functions



All reports are accessed by clicking on the Reports module in the **Admin tab**. The reports have been designed to be run quickly and easily with only a few parameters to choose before exporting your report to Excel.

My Reports is a list of reports that you have saved in your account.

The **Reports** list includes reports that have been created by *CUSOURCE* Knowledge Network and require limited filtering to generate the data you need.

Running Reports



1. Click on the report you want to run from the list.

Reports

Activity Registration/Completion Report

All Training Completion Report

Spend Report

User Profile Information Report

2. Depending on the report, you can filter by activity name, login ID, and date ranges to isolate registration and completion periods.

Report Parameters

Activity Name ?

Learner Login ID (leave blank for all) ?

Registration Date Range Start

Registration Date Range End

Completion Date Range Start

Completion Date Range End

Save

Save As

Delete

Preview

Download

3. Click **Preview** to view the report data on the screen.
4. Click **Download** to export the file in Excel format.

For more information, contact Client Solutions at clientsolutions@cusource.ca or 1.888.367.1386

