

Understanding QualityTrainingPortal Administration Roles

Permission Levels

Each profile created in QualityTrainingPortal must be assigned a Permission Level. There are 4 Permission Levels, each higher level provides all of the functionality of the lower level(s), but also added additional functionality.

Level 1

LEARNER

- Assigned to ONE Training Group.
- Can take training.
- Can request or self-assign training based on options set in profile.
- Can be assigned to a supervisor from the same Training Group.
- Each Learner can have only ONE Supervisor and that Supervisor must be in the same Training Group as the Learner.
- Can be moved to another Training Group, but all previously assigned credits remain charged to the Training Group the Learner was in when the course was assigned.

Level 2

SUPERVISOR

- All functionality of Level 1.
- Can be selected as a Supervisor for one or more Learners in the same Training Group as the Supervisor.
- Supervisors can review training records for Learners assigned to them but they cannot assign training or set up new learners.

Level 3

TRAINING GROUP ADMINISTRATOR

- All functionality of Levels 1 and 2.
- Can add new Learners, make a Learner a Supervisor and assign a Supervisor to a Learner.
- Can Serve as the Primary Training Group Administrator for any Training Group.
- Can view training records for Learners in Training Groups the TGA administers.
- There can be multiple people with Permission Level 3 in a Training Group, one must be assigned as the PRIMARY Training Group Administrator and others with Permission Level 3 are SECONDARY Administrators.
- All Training Group Administrators are assigned to a HOME Training Group, but can be the Primary TGA for other Training Groups. To perform tasks in non-HOME Training Groups, the admin must CHANGE into the Desired Training Group first.

Level 4

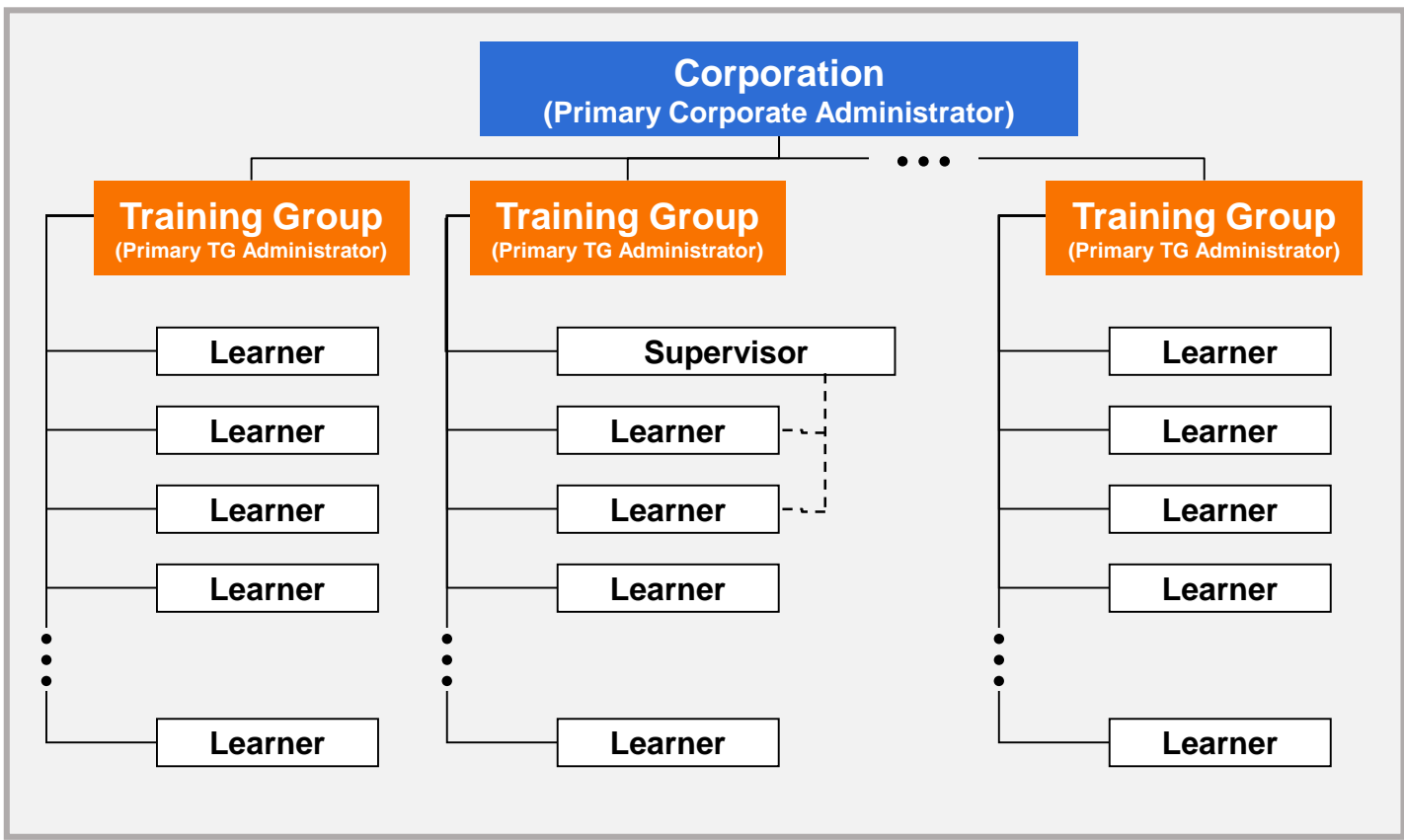
CORPORATE ADMINISTRATOR

- All functionality of Levels 1, 2 and 3.
- Can add a new Training Group and make a Learner a Training Group Administrator, and Assign a Primary Training Group Administrator to a Training Group.
- Can Serve as the Primary Training Group Administrator for any Training Group.
- Can Run reports for specific Training Groups OR for the ENTIRE Corporation.
- There can be Multiple Corporate Admins, but only ONE PRIMARY Corporate Administrator. All others with Level 4 Permissions are SECONDARY Corporate Administrators.



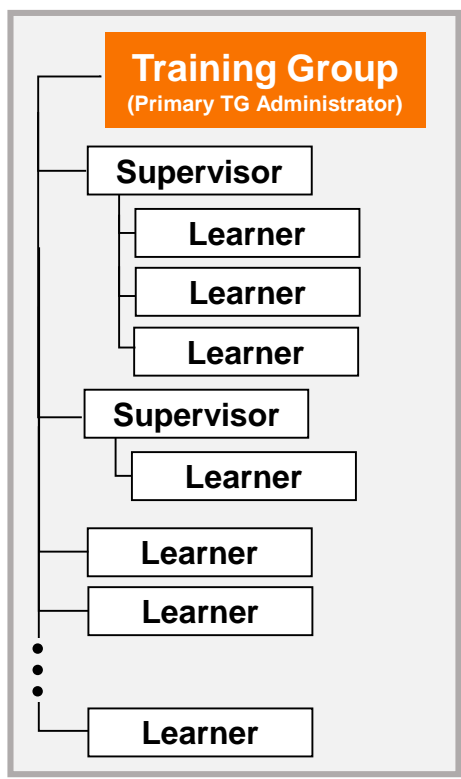
Training Groups

With a Corporate Subscription, you may have as many Training Groups as you wish. Large Work Groups may have TWO Training Groups. Small Workgroups have ONE Training Group.



Relationships: Training Group Administrators, Supervisors and Learners

In the Learner Profile, there is an option to assign a Supervisor to each Learner. Anyone who is in the SAME Training Group as the Learner AND who is Permission Level 2-4 will show up in the dropdown list. Since Anyone who is Level 3 or 4 will be able to review training records for anyone in that Training Group, generally they should NOT be assigned as a Supervisor for a Learner.



LEARNER PROFILE

Search for Learner: Choose OR Enter a New Learner: Add New Learner

STATUS: Found [R]=REQUIRED FIELD

LEARNER INFORMATION

Company Name: 1A Test Company

Learner Name [R]: Tyler [McDermott] LOGIN

Learner Identifier: []

Training Group [R]: QTP Learners (cc43956)

Supervisor: Ray Mikulak (Training Group - QTP Learners)

Telephone Number: [] Ext. []

Email Address: []

Username [R]: []

Password [R]: []

Active Status: Yes

LEARNER PERMISSIONS

Permission Level [R]: Learner

Catalog Access [R]: May Self-Assign Courses

Credits Used: 3.5

Credits Available: 0.0 (Enter "0" so credits are not limited at this level, see Tooltip for more details)

If Updating, check here to notify TYLER MCDERMOTT by email (requires a valid email address)

After making changes above, click

Primary Administrators

Primary and Secondary Administrators can perform many of the same functions, but the Primary Administrator will have more interaction with Learners through QualityTrainingPortal.

PRIMARY ADMINISTRATOR

- There is not a LOT of difference between what a Primary and Secondary Administrator can do.
- The biggest difference is that LMS Communications between Learners and Administrators ALWAYS go through the Primary Training Group Administrator. This includes:
 - If the option to receive copies of Learner Course Registrations is turned on, the Primary TG Admin will receive these.
 - If the option to receive emailed Course Results is turned on, the Primary TG Admin will receive these.
 - If the Learner is Allowed to Request Courses, the Primary TG Admin will receive these requests.
 - The Primary TG Admin is listed as the email contact and the Admin in the Learner's Drop Down Learner Menu.
- Anyone with Permission Level 3 or 4 can be assigned as the Primary TG Administrator for multiple Training Groups.

TRAINING GROUP SETTINGS

Contract [R] ⓘ Test Contract - (test) ▾

Learner Course Added Email ⓘ Yes ▾

E-mail course results to Training Group Administrator ⓘ Yes ▾

Credits Used ⓘ 226.1

Credits Allocated ⓘ 0.0 (Enter "0" so credits are not limited at this level, see Tooltip for more details)

Default Days to Complete Course ⓘ 30 Days (current corp setting: 30)

Select - Permission for Training Group when registering Learner [R] ⓘ Allow access to catalog but only allow registration by request ▾

Training Group Notes ⓘ

Secondary Administrators

Secondary Administrators can perform many of the same functions as Primary Administrators.

SECONDARY ADMINISTRATORS

- Can do everything that the Primary Administrator can do.
- Will not receive any course registration, course requests or course completion emails through the system.
- Someone with Level 3 Permission can only be a Secondary Administrator for his/her HOME Training Group. This means that someone can ONLY be a Secondary Training Group Administrator for ONE Training Group which must be his/her HOME Training Group.

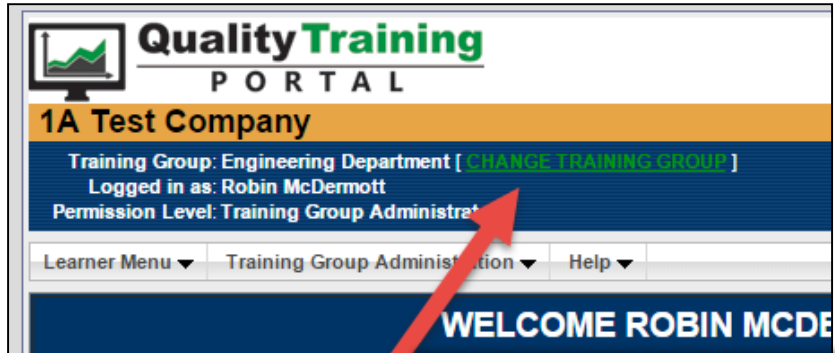


Definitions

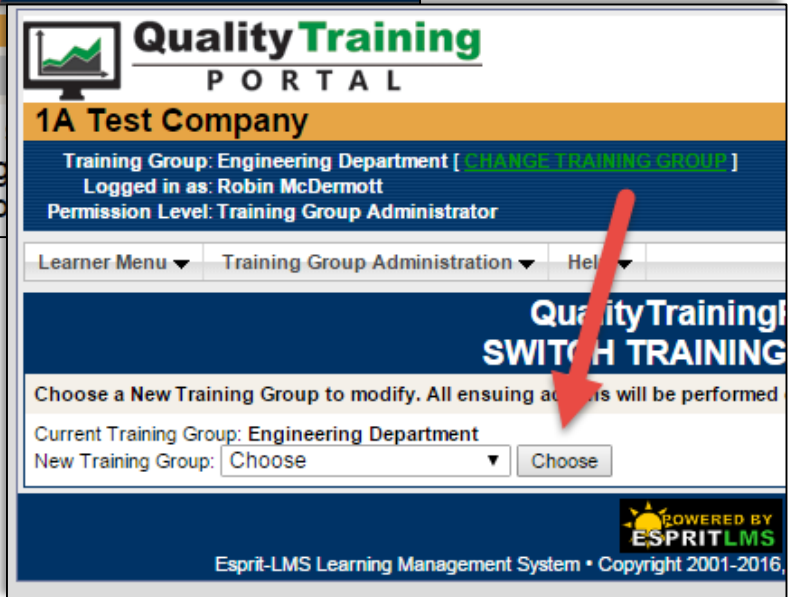
Glossary of Quality Training Portal Administration Terms

Training Group/Home Training Group

- All Learners must be assigned to a Training Group. This Training Group is called the Learner's HOME Training Group. When Learners with Administrator Permissions log in, they are logged into their HOME Training Group. To do anything in a different Training Group (add learners, assign courses, send group emails) the Admin must first CHANGE into that Training Group.



IMPORTANT! Everyone complete the 8-D Training course by then, please no



Glossary of QualityTrainingPortal Administration Terms

Learner Profile

- Everyone MUST have a Learner Profile. Even people who are Administrators or Supervisors and will not be taking courses, MUST have a Learner Profile.

The screenshot shows the 'Learner Profile' form in the QualityTrainingPortal. The page header includes the logo for QualityTrainingPortal (Resource Engineering, Inc.) and the date 'Good Morning! It's October 27, 2015'. The user is logged in as 'Robbin McD' with a permission level of 4. The form is titled 'LEARNER PROFILE' and includes a navigation menu with options like 'Learner Menu', 'Training Group Administration', 'Corporate Administration', and 'Help'. The form is divided into two main sections: 'LEARNER INFORMATION' and 'LEARNER PERMISSIONS'. The 'LEARNER INFORMATION' section contains fields for Company Name (1A Test Company), Learner Name (required), Learner Identifier, Training Group (QTP Learners), Supervisor (Choose), Telephone Number, Email Address (required), Username (required), Password (required), and Active Status (Yes). The 'LEARNER PERMISSIONS' section contains fields for Permission Level (Learner), Catalog Access (May Request Enrollment in Courses), and Credits Used. At the bottom, there is a checkbox to notify the learner by email and 'Add' and 'Reset' buttons. The footer indicates the system is powered by ESPRIT LMS and is a copyright of Resource Engineering, Inc.