

A smiling woman with long dark hair and black-rimmed glasses is sitting at a wooden desk, looking at a computer monitor. She is wearing a white t-shirt. The background is softly blurred, showing an office environment with warm lighting.

trainingtoday

# MANAGER'S GUIDE

For the TrainingToday Learning  
Management System



Welcome to TrainingToday's eLearning platform! This guide explains how to navigate the features and functions of your online training platform. Instructions for administrators begin with the "Administrator Guide" section on p. 2. Instructions for students begin with the "Learner Guide" section on p. 19.

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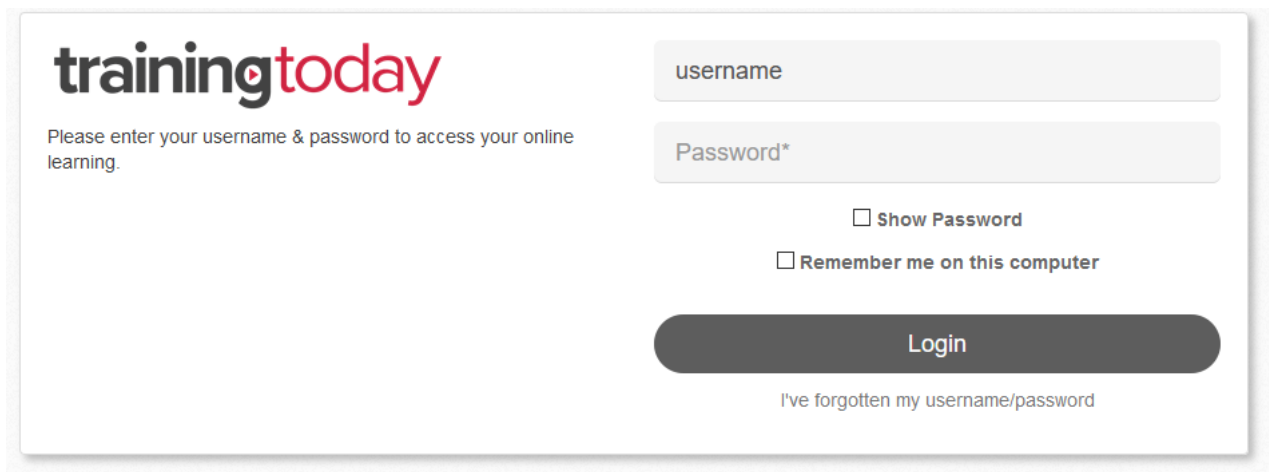
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## Administrator Guide

This guide explains how you as an administrator can navigate the features and functions of your online training platform. You also have a learner (student) view in your account.

### Login

As an administrator, your login information has been created by the Customer Success team. This ensures your correct administrative functionalities are available to you. If you have not received your username and password, or if you have any questions while using the site and/or its training materials, contact your Customer Success team at [help@blr.com](mailto:help@blr.com) or call **(800) 274-6774 Ext. 1565**.



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Please enter your username & password to access your online learning.

username

Password\*

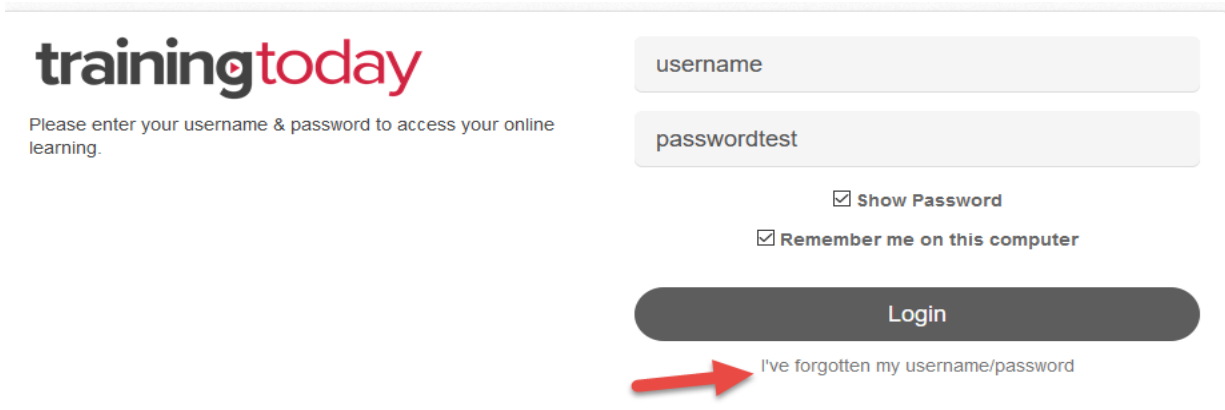
☐ Show Password

☐ Remember me on this computer

Login

[I've forgotten my username/password](#)

To login to the system, enter your username (generally your email address) and password, then select “Login”. The system will require you to change your password upon your first login. You can check “Remember me on this computer” for the system to save your username and password, so you do not have to enter it at each login. If you have forgotten your username or password, select “I’ve forgotten my username/password”, then follow the steps presented to retrieve your credentials.



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Please enter your username & password to access your online learning.

username

passwordtest

☒ Show Password

☒ Remember me on this computer

Login

[I've forgotten my username/password](#)

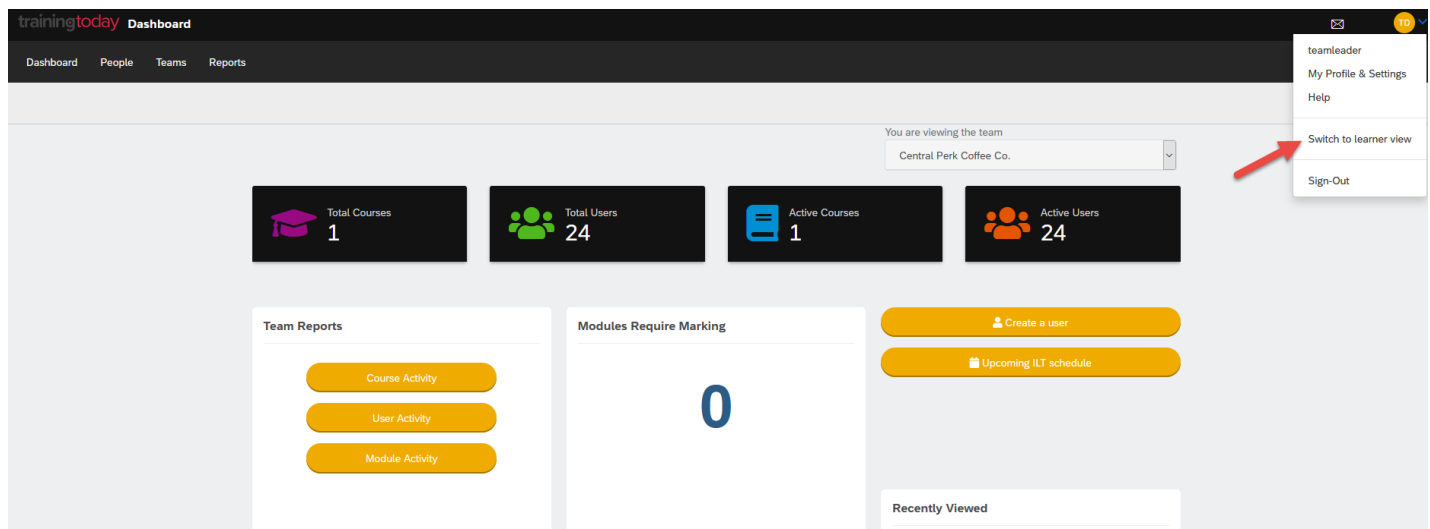
## Administrator Homepage/Dashboard

Your homepage is the administrator dashboard. From this page, you can see all your active courses and users, plus some shortcuts to make navigation easier.

Note the four tabs at the upper left of the page: Dashboard, People, Teams, and Reports. We will cover each of these tabs in more detail throughout this guide.

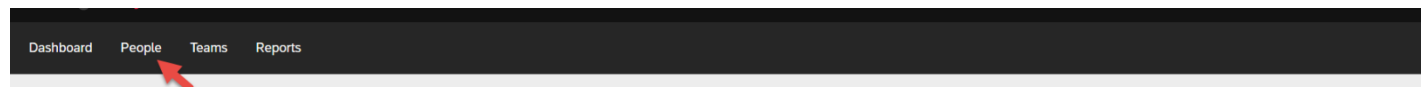
You can change your administrator dashboard to a learner dashboard by selecting the account settings icon at the upper right of the page and selecting “Switch to learner view” from the drop-down menu. To change back to an administrator dashboard, follow the same steps, but select “Switch to admin view”.

Instructions specific to the learner dashboard begin in the “Learner Guide” section on p. 19.

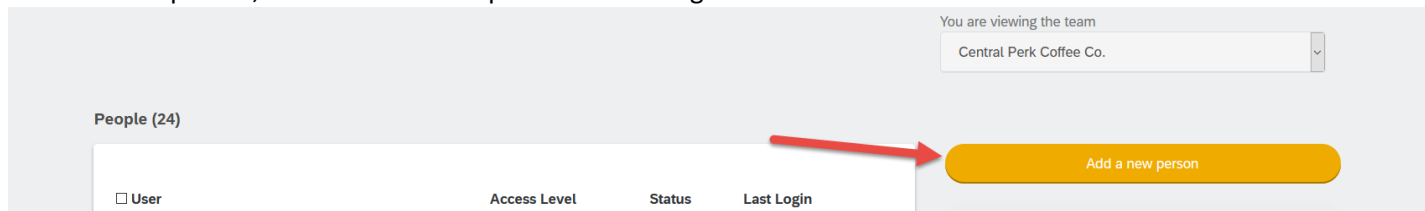


## Creating Learners

There are two ways to add learners to the system: creating a single learner (which is done through a shortcut on your dashboard) or creating learners in bulk by uploading an import sheet. To complete either of these actions, select the People tab.



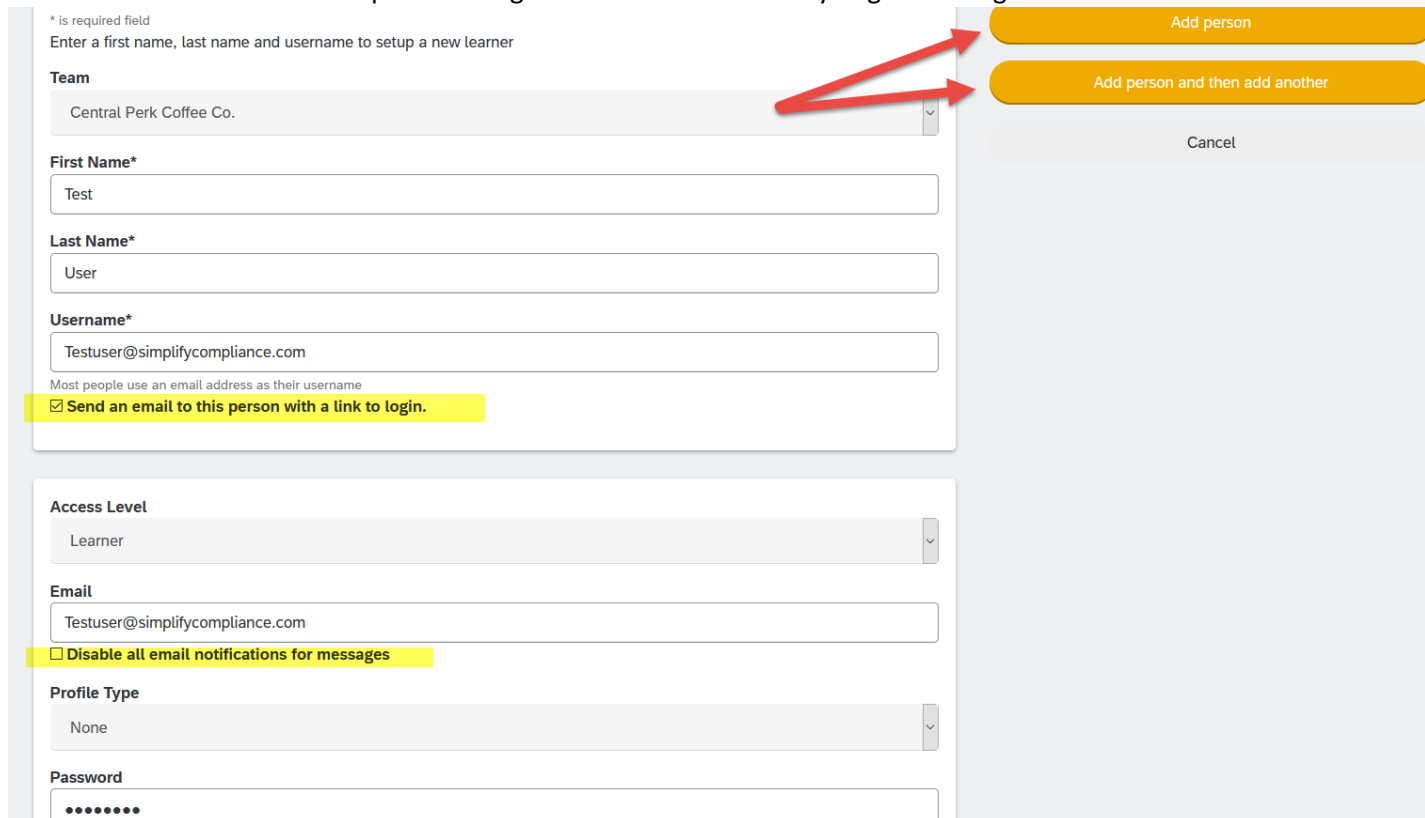
From the People tab, select “Add a new person” on the right.



Next, in the fields provided, fill out the learner’s first name, last name, username (we recommend making this the learner’s email address), email address, and desired password. The password must be at least eight characters long and must contain at least one uppercase letter, one lowercase letter, one number, and one special character. If you do not choose a password, the system will send the learner a generic password that they will have to change upon their first login.

**Note:** By default, the system will send a welcome email to any learners you create. Uncheck the “Send an email to this person with a link to login” box if you do not want a welcome email sent. Check the “Disable all email notifications for messages” box if you do not want the system to send any emails to the learner.

You are welcome to fill out the other fields available on this screen, such as the learner’s street address and job role, but this is not required. Once you are finished, select “Add person” to complete the registration, or select “Add person and then add another” to complete the registration and immediately begin creating another learner.



## Creating Learners in Bulk

From the People tab, select “Options” on the right, then select “Import people in bulk”.

Here, you will be asked to provide an import sheet containing data for the learners you wish to add. To get started, you can select “use this template to get started” to download a sheet with example data filled in. This guide also contains a blank import sheet right below this paragraph; select the icon to open it.



Learner import sheet.csv

The fields in this file are the same fields you would fill out when adding a single learner: username, email address, first name, last name, and password. The system will generate a unique password for any learner whose password field is left blank.

	Username	Email	First Name	Last Name	Password [Optional]
1	testuser1	testuser1@simplycompliance.com	Test	User 1	W3lcome!
2	testuser2	testuser2@simplycompliance.com	Test	User 2	W3lcome!
3	testuser3	testuser3@simplycompliance.com	Test	User 3	W3lcome!
4	testuser4	testuser4@simplycompliance.com	Test	User 4	W3lcome!

Once you have finished filling out the import sheet, select “Browse...” to attach the completed file.

After you have attached the import sheet, check the “The first row of my file contains column titles” box if your sheet contains column headers. You can also change the language of the site components, which defaults to English, and the time zone used on the site, which defaults to EST. Once completed, select “Next”.

**Note:** Changing the language only affects the language of the site itself, not the eLearning content.

Central Perk Coffee Co.

### Import new people

Upload up to 5000 users at once:

Your file must include these fields: First name, last name, username , Team code

If you're not sure how to create CSV file [use this template to get started.](#)

Choose a file

Learner import sheet.csv

☒ The first row of my file contains column titles

Language

English (United States)

Time zone

(UTC-06:00) Central Time (US & Canada)

After you select “Next”, the system will format the import sheet. Once this is done, select “Map Fields”.

### Import new people

Upload up to 5000 users at once:

Your file must include these fields: First name, last name, username , Team code

If you're not sure how to create CSV file [use this template to get started.](#)

Here, you will map each of the displayed fields to the appropriate column in your import sheet. For example, for the First Name field, you would ensure the drop-down selector matches the column titled First Name in your import sheet. Once you have mapped your fields, select “Import”.

### Select the fields you want to import

Your file contains approximately 5 People

Match the columns in your file with the fields Litmos needs to create a new user account.

\* Required  
The values in the lists below are from the first row of your file.

**First Name\***

First Name

**Last Name\***

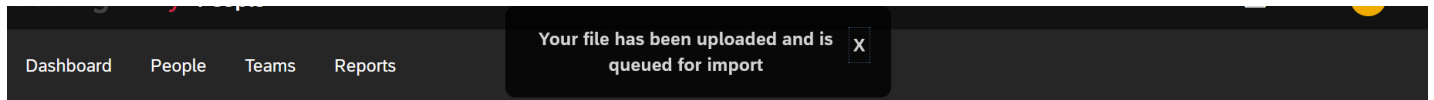
Last Name

**Username\***

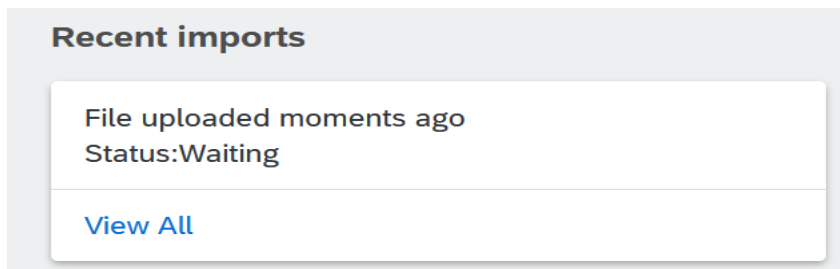
Username

Usually an email address

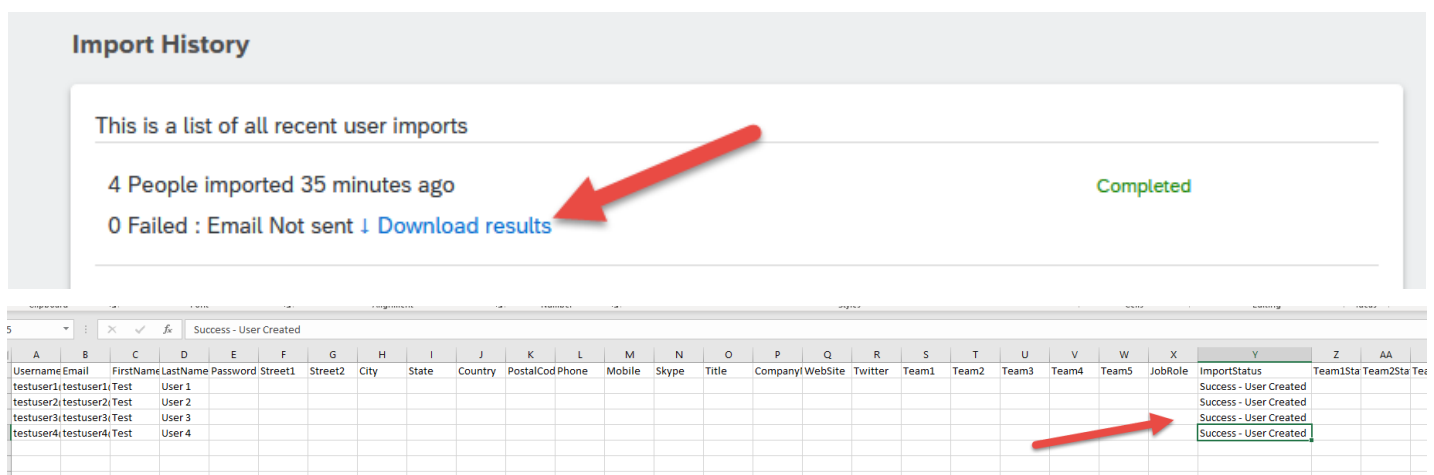
You will now be taken back to the People tab and see a message at the top of the page confirming the request is processing.



Under the People tab, you can check the status of your request under the “Recent imports” section. You can select “View All” to see your entire import history.



After a few minutes, the import status will change to “Completed” and you can select “Download results” to see the details.



When looking at the downloaded results, the status of the import for each learner will be displayed in the column labeled “ImportStatus” (column Y). If this column says “Success - User Created”, that learner has been created successfully. Otherwise, the column will explain why a learner wasn’t created—for example, you may have used an invalid character or provided an invalid email address.

If you encounter any complications with using the import feature, please contact the Customer Success team at [help@blr.com](mailto:help@blr.com) or call (800) 274-6774 Ext. 1565.

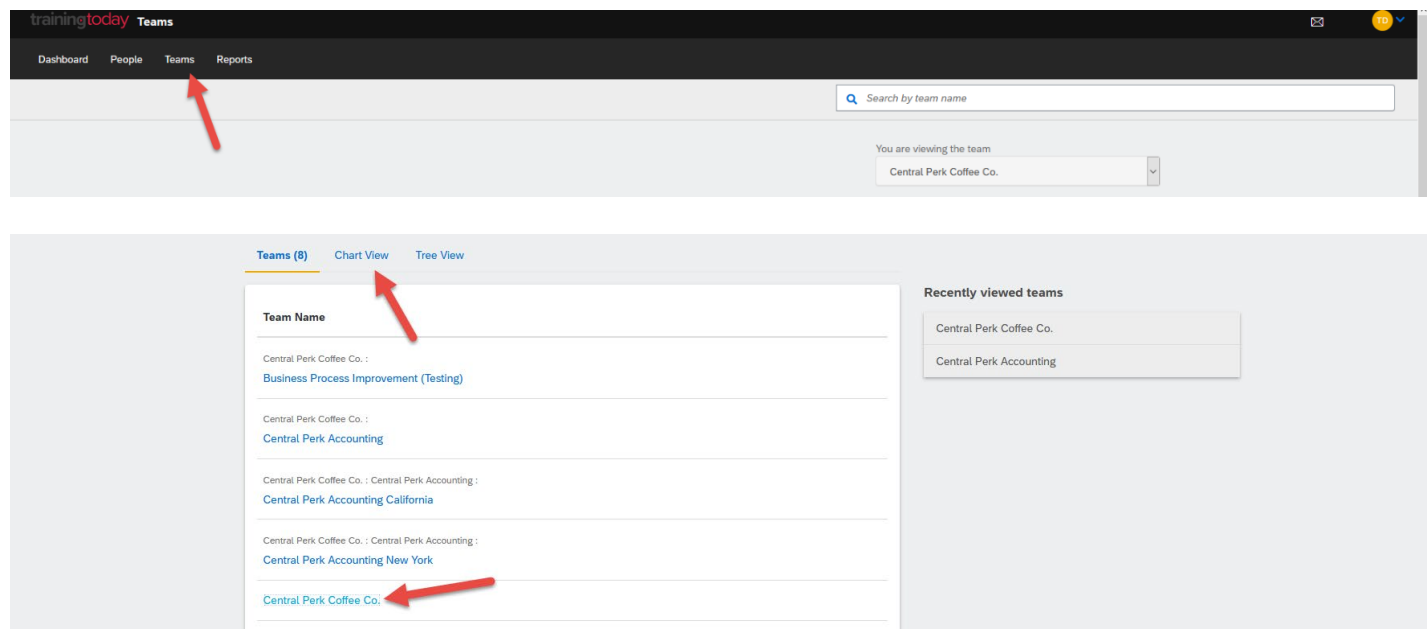


Your team structure is one of the most important elements of the training platform. This is how you organize your learners into groups and deliver targeted training to those groups. A primary team has already been created for you, but you can add teams and sub-teams to create a structure that's as detailed as you like.

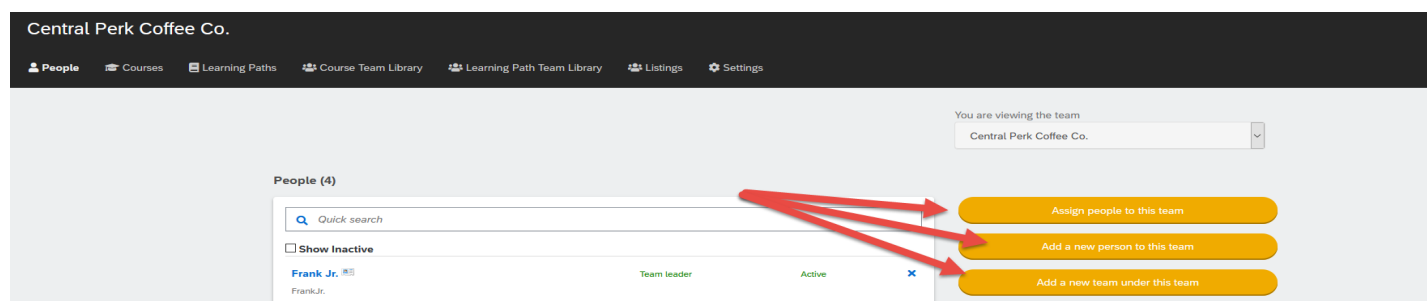
To begin, select the Teams tab at the top of the page, then select the team you want to edit (in this guide, you'll see "Central Perk Coffee Co." used in the screenshots as the primary team).

### Tips:

- Select "Chart View" for a visual representation of your team structure. We recommend frequently checking the Chart View when building a large team structure to verify it aligns with your original plan.
- Think your decisions through carefully—once the structure has been built, it isn't easy to make changes!











On the right side of the page, you can select "Assign people to this team" to assign existing learners to the team, select "Add a new person to this team" to create a new learner who will be added to the team, or select "Add a new team under this team" to create a sub-team.



Next, we will cover the additional choices in the Teams tab that will be most useful.

## Central Perk Coffee Co.

 People  Courses  Learning Paths  Course Team Library  Learning Path Team Library  Listings  Assets  Settings

**People** – Provides an overview of all learners in this team. From here you can select a learner to edit, view or manage team leads, view sub-teams, or deactivate a learner.

**Courses** – Lists courses available for assignment. See “Assigning Training” in this guide for more information on the different ways to assign courses.

**Learning Paths** – Lists learning paths (bundles of courses) available for assignment.

**Course Team Library** – Lists courses assigned to the team to complete.

**Learning Path Team Library** – Lists learning paths assigned to the team to complete.

**Listings** – Displays a collection of courses and/or learning paths all in one place.

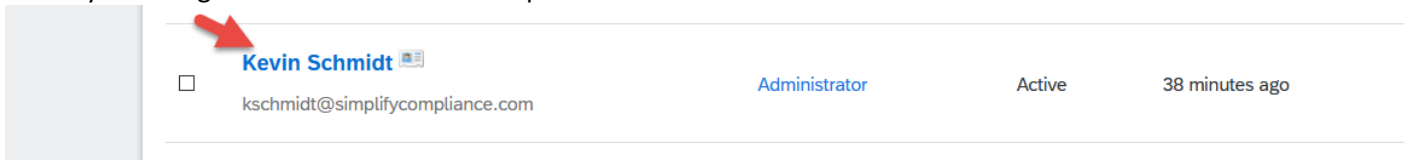
**Settings** – Allows you to change the team name or add a description for the team.


## Assigning Training

There are three ways to assign training to learners: assigning a course to a single learner, assigning a course to a team, or creating a catalog for learners to register themselves.













### Assigning Courses to a Single Learner

Start by selecting the learner under the People tab.



<input type="checkbox"/>	<b>Kevin Schmidt</b>  kschmidt@simplifycompliance.com	Administrator	Active	38 minutes ago
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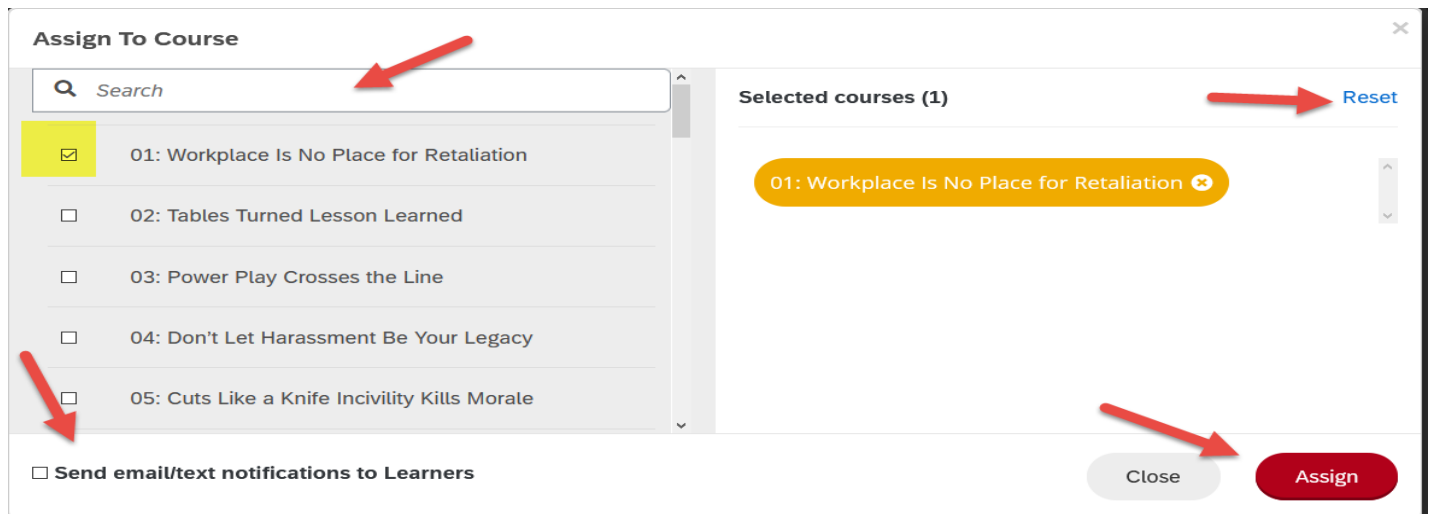
Next, select “Courses”.

 Recent activity  Achievements  External Learning  Gamification  Courses  Learning Paths  Teams  Schedule  Listings  Assets  Instructor  Manager

Then select “Assign To Course”.



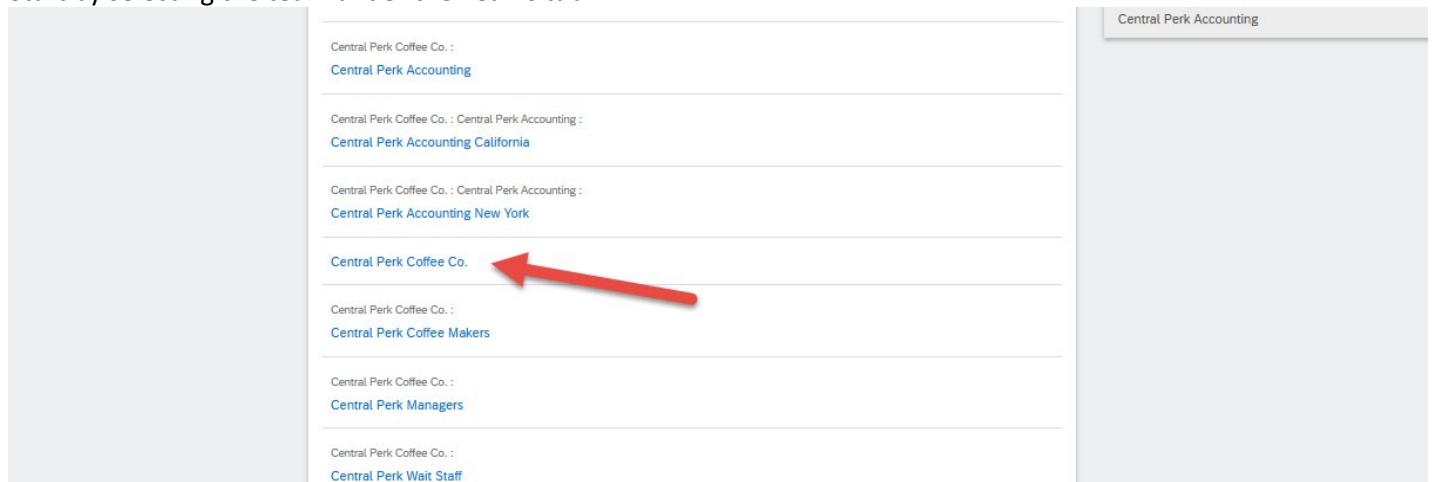
Next, select the desired course(s) by using the search field, checking the box to the left of the course title(s), and checking “Send email/text notifications to Learners” if you wish to notify the learner about the new assignment. Once complete, select “Assign”.



**Tip:** As you select courses, you will see them appear in the “Selected courses” column. To remove your selections and start over, select “Reset”.

## Assigning Courses to a Team

Start by selecting the team under the Teams tab.



Next, select “Courses”.

Then select “Assign Courses to [insert team name]”.

Courses (0)

Next, select the desired course(s) by using the search field and checking the box to the left of the course title(s). You can check “Also assign to sub teams” if you want to automatically assign the course(s) to any sub-teams under the selected team and check “Send email/text notifications to Learners” if you wish to notify team members about the new assignment. Once complete, select “Assign”.

**Tip:** As you select courses, you will see them appear in the “Selected courses” column. To remove your selections and start over, select “Reset”.

Search by course title

☐ 01: Workplace Is No Place for Retaliation  
☐ 02: Tables Turned Lesson Learned  
☐ 03: Power Play Crosses the Line  
☐ 04: Don't Let Harassment Be Your Legacy  
☐ 05: Cuts Like a Knife Incivility Kills Morale

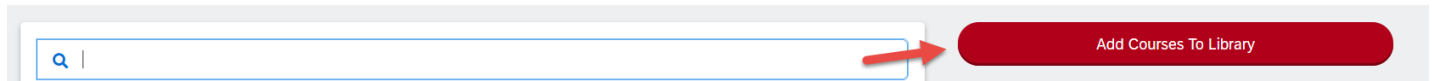
☐ Also assign to sub teams
 ☐ Send email/text notifications to Learners

Selected courses (0)

## Assigning a Catalog of Courses

Start by selecting a team under the Teams tab, then select “Course Team Library”.

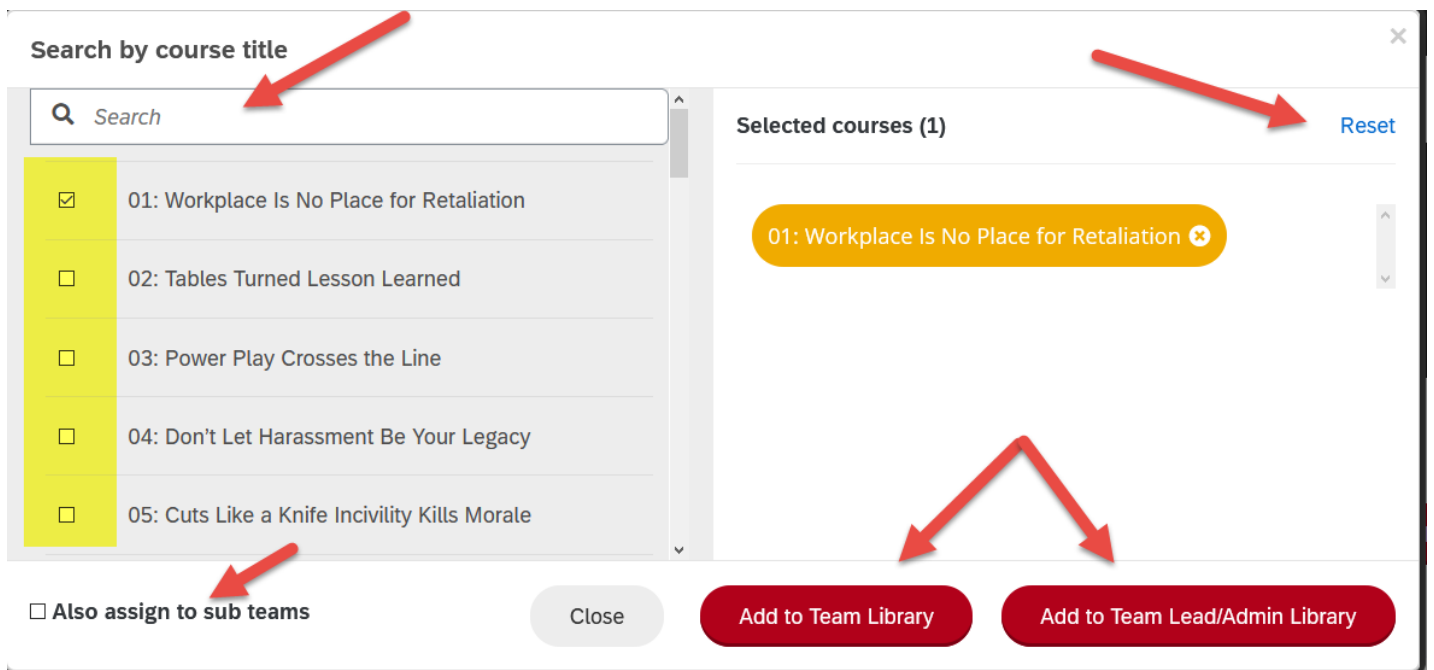
Select “Add Courses To Library”.



A horizontal bar with a search input field on the left and a red button labeled "Add Courses To Library" on the right. A red arrow points from the search field to the button.

Similar to the steps for assigning courses to a single learner or team, you can use the search field to search for specific courses, assign multiple courses, and check “Also assign to sub teams” as desired. Once you’re finished selecting courses, you will have 2 choices to select, “Add to Team Library” will add the courses to the learner dashboard or “Add to Team Lead/Admin Library” will only let the Team Lead/Team Admin assign those courses to other learners.

**Tip:** As you select courses, you will see them appear in the “Selected courses” column. To remove your selections and start over, select “Reset”.



A modal window titled "Search by course title" with a close button (X) in the top right. It contains a search bar, a list of courses, a "Selected courses" section, and assignment buttons at the bottom. Red arrows point to the search bar, the "Reset" button, the "Also assign to sub teams" checkbox, and the two assignment buttons.

Search by course title	
<input type="text" value="Search"/>	
<input checked="" type="checkbox"/>	01: Workplace Is No Place for Retaliation
<input type="checkbox"/>	02: Tables Turned Lesson Learned
<input type="checkbox"/>	03: Power Play Crosses the Line
<input type="checkbox"/>	04: Don't Let Harassment Be Your Legacy
<input type="checkbox"/>	05: Cuts Like a Knife Incivility Kills Morale

☐ Also assign to sub teams

Close

Selected courses (1)

01: Workplace Is No Place for Retaliation

Reset

Add to Team Library

Add to Team Lead/Admin Library

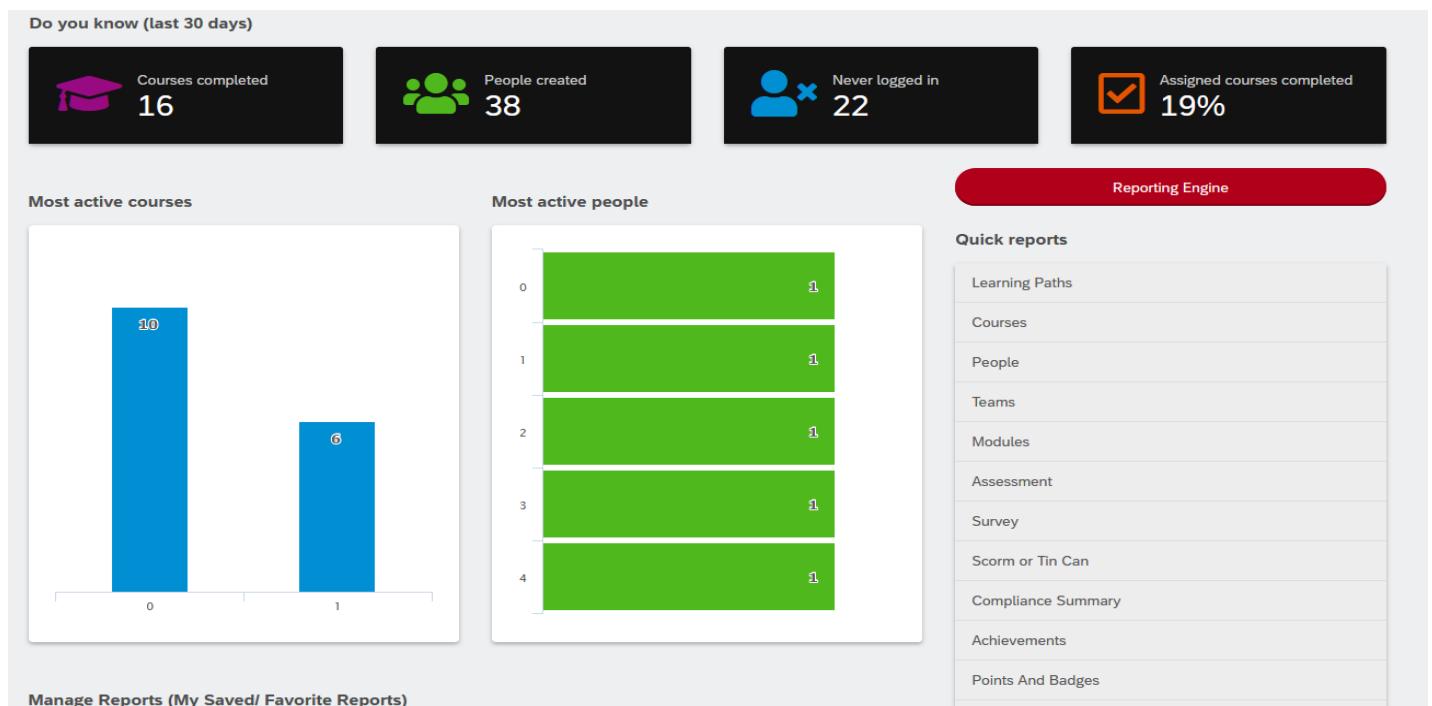


### Accessing Reports

To access reports, start by selecting the Reports tab.



The Reports tab gives you a high-level overview by displaying the number of courses completed, the number of learners in the system vs. the number of learners who've never logged in, and the most active learners and courses. On the right, you can access quick reports, which provide easy-to-use high-level data, and the Reporting Engine, which lets you design your own report and access more granular data.



### Quick Reports

Choose any item under the "Quick reports" section to get started. The screenshots in this example will showcase a quick report for a specific course.

# trainingtoday

The dashboard shows a search bar at the top right. Below it are four summary cards: Total Courses (4), Active Courses (4), Compliance (0), and Ecommerce (0). A red arrow points to the 'Courses' link in the 'Quick reports' sidebar on the right. Another red arrow points to the 'Problem Solving for Employees (R)' course in the 'List View' table below.

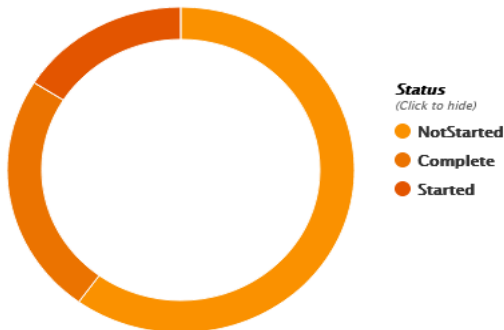
Course	Assigned people	Completed people
Problem Solving for Employees (F)	0	0
Problem Solving for Employees (R)	25	6

Once you've chosen the course you want a report on, you will see tabs at the top of the page that give you a high-level overview of learners assigned to the course, learners who've completed the course, and learners who are overdue to complete the course. Below those tabs are the full details of the report. Once you are ready to download the report, select "Download/Schedule this report" on the right.

The page title is 'Course: Problem Solving for Employees (R) - All Results are in Central Standard Time'. At the top right, a red arrow points to the 'Download/Schedule this report' button. Below the title are three summary cards: Assigned (25), Completed (6), and Overdue (0). A red arrow points to the 'List View' tab. The main table shows details for each learner.

Person	Last attempt	Marking	Overdue	Complete	Assigned Date	Due Date or Initial Compliance Due Date	Active
Aly Oswald					11/10/2020		Active
Andrea Maturo					11/10/2020		Active
Ben Geller					11/09/2020		Active
Ben Polly	11/10/2020 01:13:00 PM				11/10/2020		Active
Beth Greene	11/10/2020 01:13:00 PM				11/10/2020		Active
Carol Willick					11/09/2020		Active
Crystal Molteni	11/10/2020 04:00:38 PM			Complete	11/10/2020		Active

**Tip:** Selecting "Chart View" gives you a clean visual—perfect if you are preparing a PDF of the training summary.



Once “Download/Schedule this report” is selected, you will see a few choices for customization.

**Title:** You can name the report anything you like.

**Options:** You can download the report or schedule it to be sent to other users.

**Format:** You can receive the report in CSV or PDF format.

A screenshot of a report customization dialog box. It has a 'Title' field with the text 'Custom Report #1'. To the right is a 'Created Reports' section with a button that says 'No reports created'. Below the title field is an 'Options' dropdown menu currently set to 'Download'. Below that is a 'Format' dropdown menu currently set to 'CSV'. At the bottom are two buttons: 'Run' (red) and 'Cancel' (grey).

When you’re done customizing, select “Run”. You’ll see a message that your report is being created, and momentarily you will see a link labeled “Export Report”. Select it to download your report for viewing.

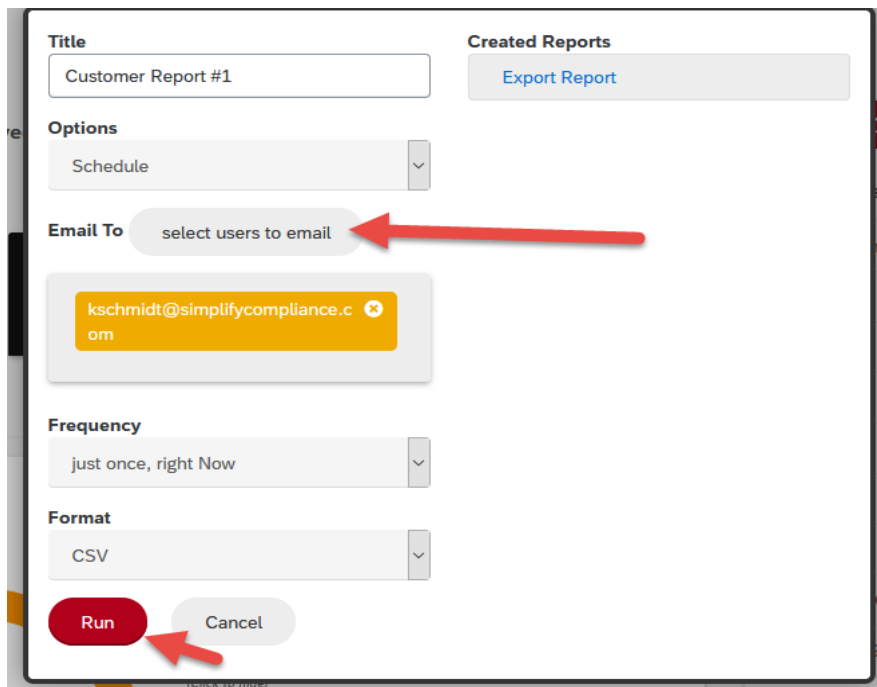
A screenshot of a report creation confirmation dialog box. On the left, a message reads: 'Thanks we are creating your report. It will be ready to download/scheduled in a few moments. Your report has been scheduled to export.' On the right, under the heading 'Created Reports', there is a button labeled 'Export Report' in blue text. A red arrow points to this button.



## Scheduling Reports

If you choose to schedule your report to be sent to other users, you will have a few additional fields to complete.

1. **Email To:** Choose “select users to email” to select from the list of existing users in your database.
2. **Frequency:** Choose how often the report will be sent out: daily, every Monday, the 1st of every month, or just once right now.



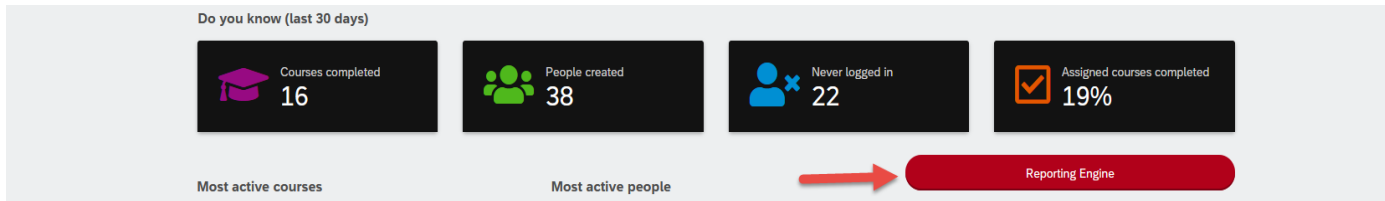
The screenshot shows a web form for creating a report. At the top, there's a 'Title' field with 'Customer Report #1' and a 'Created Reports' section with an 'Export Report' button. Below is the 'Options' section with a 'Schedule' dropdown. The 'Email To' field is set to 'select users to email', highlighted by a red arrow. Below this is a list of email addresses, with 'kschmidt@simplifycompliance.com' selected. The 'Frequency' dropdown is set to 'just once, right Now'. The 'Format' dropdown is set to 'CSV'. At the bottom, there are 'Run' and 'Cancel' buttons, with a red arrow pointing to the 'Run' button.

### Tips:

- The users you select will receive an email with a link to open the scheduled report. The link can only be accessed by users in the system and is only valid for 24 hours.
- Scheduled reports are automatically saved to your Reports Dashboard for easy access in the future. If you want to come back at another time to review a scheduled report, simply bookmark your browser's URL while viewing the report. The URL stores the exact reporting/filter criteria, which can be accessed later.
- As the administrator, you will still see the “Export Report” option that will allow you to download the report right away, even if you’ve scheduled it to be sent out later.

## Custom Reports

To build a custom report, start by selecting “Reporting Engine”.



Next, choose the type of report you want to create. Since custom reports can provide a lot of detail beyond the scope of a quick report and can produce a great deal of data, feel free to contact your Customer Success team at [help@blr.com](mailto:help@blr.com) or call **(800) 274-6774 Ext. 1565** for further guidance.

### BUILD A CUSTOM REPORT

Create a report to download or save to favorites and schedule to automatically export to your email

What would you like to report on?

▼ User
▼ Summary
📄 People Report
▼ Details
➤ Results
➤ Achievements
▼ Team
▼ Summary
📄 Team Reports
▼ Details
➤ Results
➤ Learning Path
▼ Course
▼ Summary
📄 Course Report
▼ Details
📄 Token



## Integrations and Other Configurations

Depending on your level of service, additional integrations and configurations may be available to you. For information on SSO, HRIS, and other integrations, please reach out to your sales rep or email [help@blr.com](mailto:help@blr.com).

## Learner Guide

This guide explains how you as a student can navigate the features and functions of your online training platform.

See “Login” on p. 2 for information on logging into the platform.

### Learner Homepage/Dashboard

Your homepage, also known as the dashboard, has several navigation buttons.

**Home** – Takes you back to the dashboard.

**Content Library** – Displays the catalog of courses available to be selected and take (if applicable). These are separate from courses that you have already been assigned, which also appear on your homepage.

**Achievements** – Displays all courses passed and allows you to access your certificates of completion.

**Live Sessions** – This is a calendar for any upcoming Instructor Led Training

You can select the envelope icon at the upper right of the page to see any past messages sent to you such as course completions, course registrations, and upcoming expiration dates (if applicable).




### Profile

You can customize your profile by going into your account settings. Select the drop-down menu at the upper right of the page, then select “My Profile & Settings”.



From here, you can upload a profile picture, update any of your basic information, or change your notification settings. A pencil icon indicates a field that you can edit.




## Team Leader Demo


Last login was on 18 minutes ago

[Upload a profile picture](#)
[Reset all tips & help messages](#)

### Personal Information

First Name	Team Leader	
Last Name	Demo	
Username	teamleader	
Password	<a href="#">Change password</a>	

### Basic Information

Email	teamleader@blr.com Email notifications for messages - <b>Disabled</b> Notifications for forums - <b>Disabled</b>	
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## Your Courses

Your homepage keeps things simple. You will see any courses assigned to you, and you can filter the courses by selecting “In Progress”, “Overdue”, “Not Started”, and “Completed”. The training calendar on the right will show any available, registered, or past instructor-led training sessions. You can also use the search field to search for a specific course title within a library.

Welcome, Team Leader Demo

### Assigned Training Metrics

Total 5

To do

5


Overdue

0



Completed


0

[All](#)
[In Progress](#)
[Overdue](#)
[Not Started](#)
[Completed](#)






**Pediatric CDI Essential Skills**  
Learning Path

0%  






**Risk Adjustment Documentation and Coding Boot Camp® Online**  
Learning Path

0%  






**Basic OSHA Training for New Hires in Medical Facilities**

0%  





**Business Associates (XEHIP308)**

0%  



**Problem Solving for Employees (R)**

0%  

### Calendar


< today >

**November 2020**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

☒ AVAILABLE SESSIONS  
☒ REGISTERED SESSIONS  
☒ PAST SESSIONS

### Recently Viewed

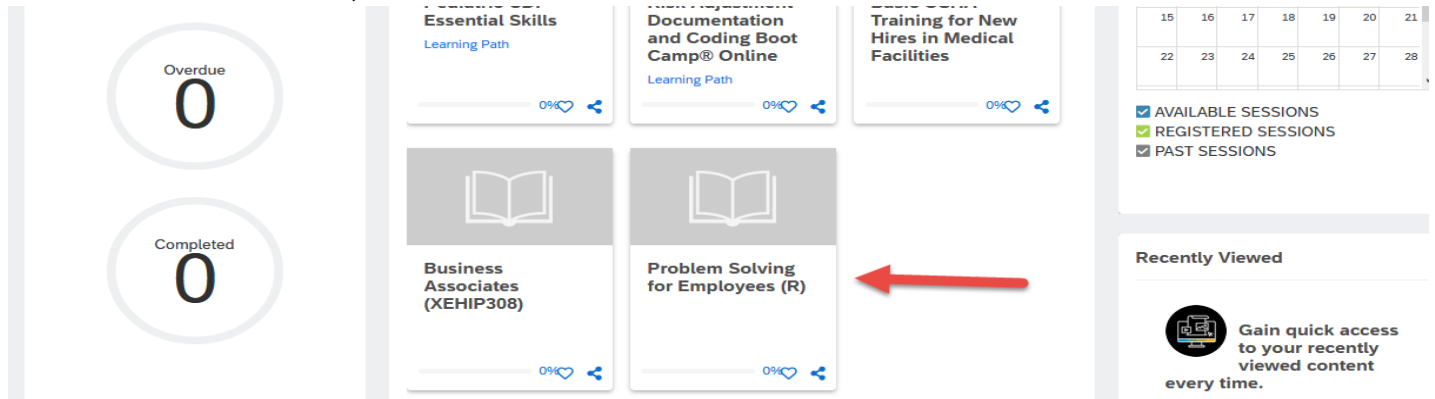


Gain quick access to your recently viewed content every time.

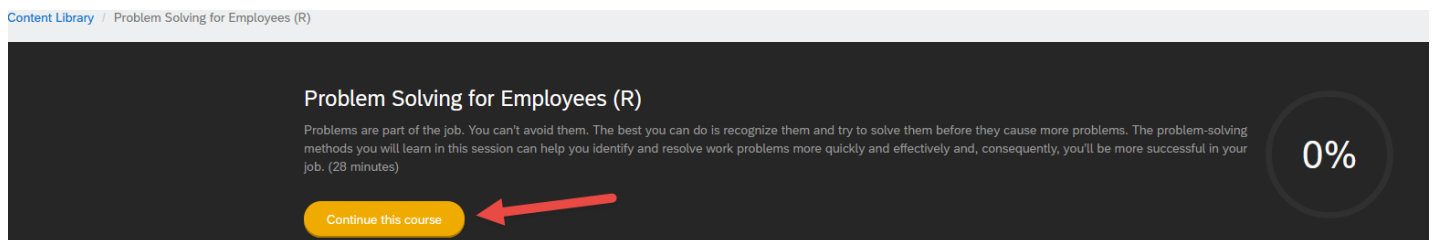
Search or go to quick links to

## Selecting and Taking a Course

To start or continue a course, choose the desired course from the list.





Next, select “Continue this course” and the course will begin.





**Tip:** While the exact look of a course may vary based on the courses/libraries your administrator has purchased, you will find similar features across all courses. Please reach out to [help@blr.com](mailto:help@blr.com) with any questions on course functionality.

Once you've opened a course, you will have several menu items available:

1. **Play/Pause Buttons** – Play, pause, or resume the training. 
2. **Navigation Buttons** – Navigate forward to the next slide or back to the previous slide. 

**Note:** Some courses will require you to complete each slide before moving on to the next one. This is determined by your administrator.

3. **Refresh Button** – Replays the current slide from the beginning. 
4. **Volume** – Adjusts or mutes the course audio. 
5. **Tool Bar**

**Menu Attachments Help Transcript Exit**

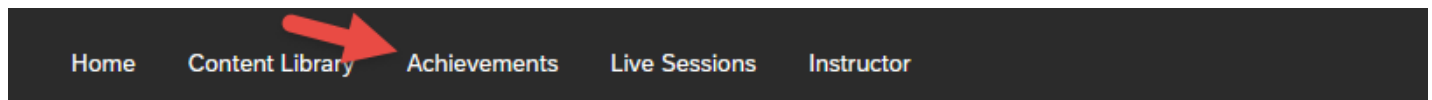
- A. **Menu** – Displays a table of contents for the course.

- B. **Attachments** (or Resources) – Displays any course-related materials. You can download an attachment by selecting it.
- C. **Help** – Displays general information about the training window.
- D. **Transcript** – Displays the transcript for the course.
- E. **Exit** – Closes the training window.
- F. **Ask the Expert** (not shown) – Allows you to connect directly with our internal subject matter experts. This feature is available on select courses, including required state-specific sexual harassment training and HCPPro’s Boot Camp series.

**Note:** If you’re returning to a course you’ve partially completed, the course will prompt you to pick up where you left off.

## Certificates of Completion

Once a course has been completed, you can access your certificate of completion by selecting “Achievements”.

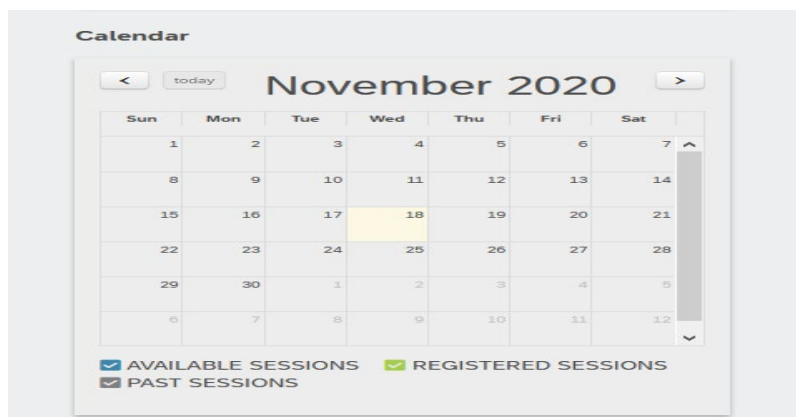


Next, select “Download certificate” next to a course title to access the course’s certificate of completion.



## Training Calendar

Any instructor-led training sessions will be displayed on the training calendar, which can be found on your dashboard.



## Need More Help?

For additional help, please contact your Customer Success team at [help@blr.com](mailto:help@blr.com) or call **(800) 274-6774 Ext. 1565**.

