Admin User Guide

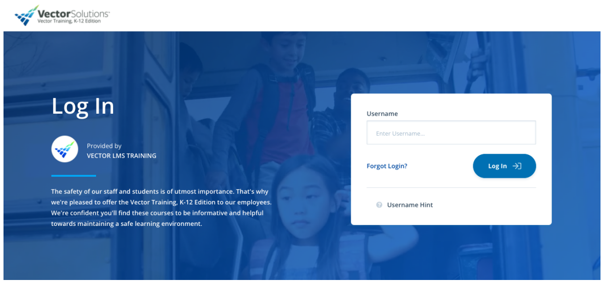
Table of Contents

Logging In 1

Main Area 1
- My Assignments 1
- Training History 2
- Extra Training 2

Admin Area 3
- Dashboard 3
- Training Plans 4
  - Group Training 4
    - How To Assign Group Training 5
  - Repeating Training 7
  - New Hire Training 8
  - Offline Training 9
    - How To Set Up Offline Training 9
- Employees 11
  - How To Add A New User 12
  - Editing Users 13
  - Permissions 16
  - How To View A User’s Training History 17
  - Positions & Locations 17
  - Self Registration 19
- Courses 21
  - Online Courses 22
    - Follow Up Assignments 22
    - How To Configure Courses 23
      - How To Create A Custom Survey 26
  - Custom Courses 29
    - Creating Custom Courses 29
  - Offline Courses 33
    - How To Create An Offline Course 33
- Reports 34
  - Quick Reports 34
  - Compliance by Employee 34
  - Completions by Employee 35
  - Completions by Employee 36
  - Training Compliance 36
  - Assessments 37
- Settings 38
  - Emails 38
  - Login Page 39
  - Training Plan 40
  - Certificate 41
- Help Resources 41

Logging In



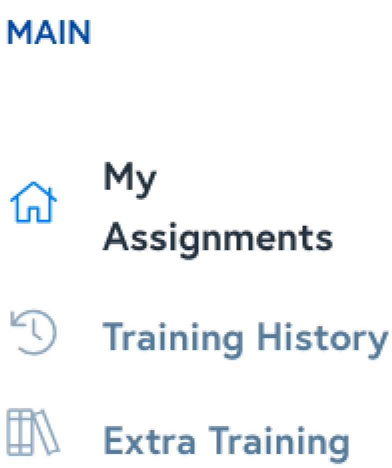
The first page users will see when visiting their training site is the login screen. This is where users must enter their username and password to access their training. **Note:** Only users with administrative access are required to enter a password unless your organization chooses to require passwords for all users.

Every organization has a unique training URL. Follow the steps below to locate your training site.

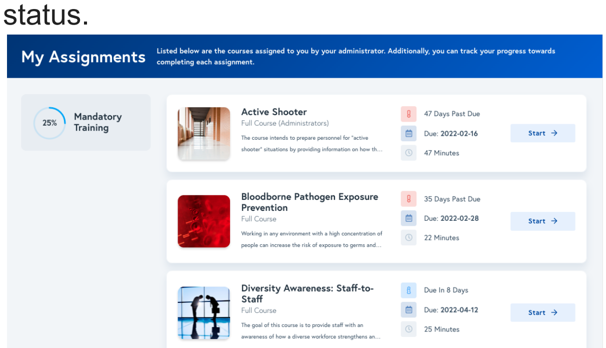
1. **Check your inbox.** If you have been assigned training by your organization and email notifications have been enabled, you should have an email from your organization's training administrator. It will come from a "@vectorsolutions.com" domain or from your organization's domain. We suggest performing a universal search for "Vector", “SafeColleges”, or "SafeSchools" in your inbox to determine if the URL has been shared with you.
2. **Reach out to your organization's Training Administrator.** Every organization has a dedicated training administrator who can help with login issues.

Main Area

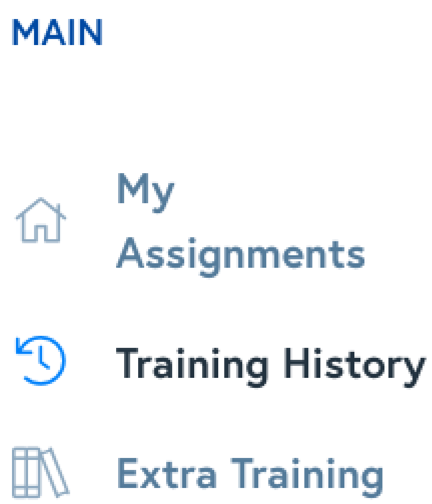
My Assignments



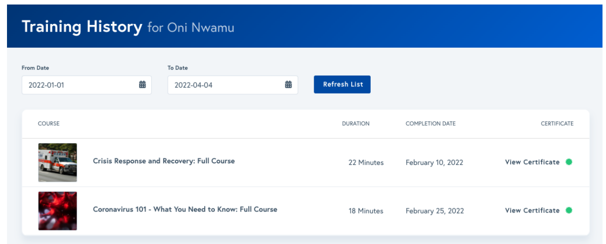
The **My Assignments** section of the navigation menu is where employees, staff, and students can access their assigned training. All mandatory and suggested assignments will appear here. Users will be able to see the courses that they are required to take, due dates, and their completion status.



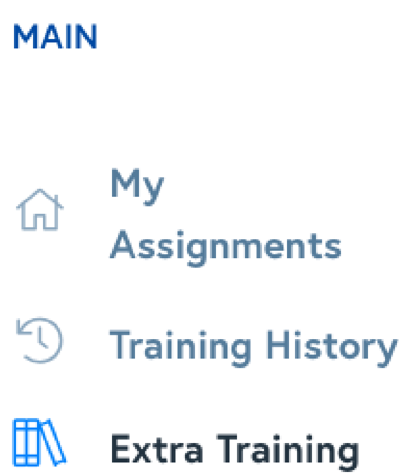
Training History



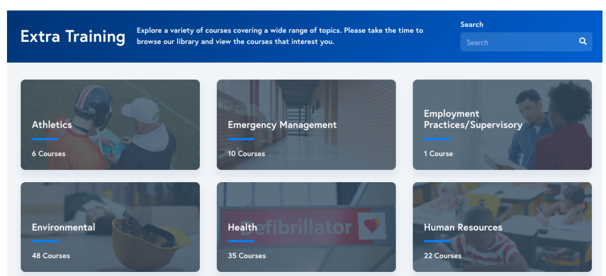
The **Training History** section is where users can access and view a full list of courses that they have completed over time.



Extra Training



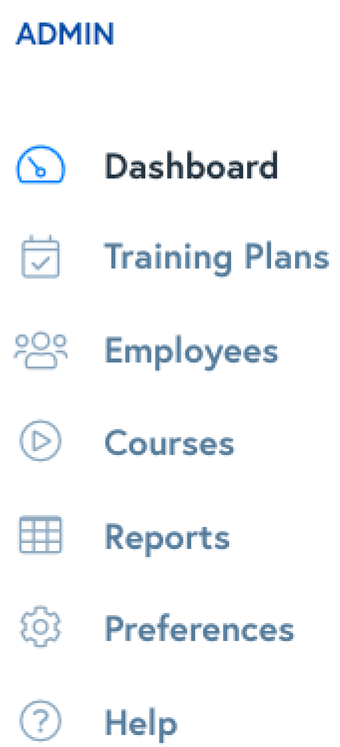
The **Extra Training** section is where users can take additional courses that they are interested in. Thousands of users complete self-assigned courses every year. Administrators can remove access to the additional courses in the courses section of the navigation menu.

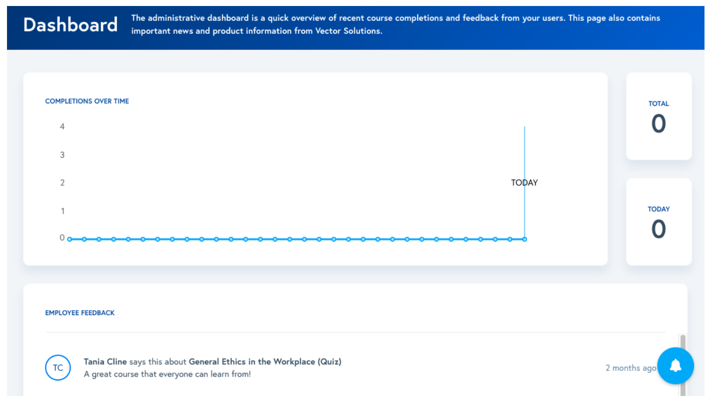


Admin Area

The **Admin Area** can only be accessed by users who have administrative permissions within the system. If you are granted administrative permissions, the Admin Area will appear in your navigation menu. The Admin Area includes a variety of features that we'll go over in this guide.

Dashboard

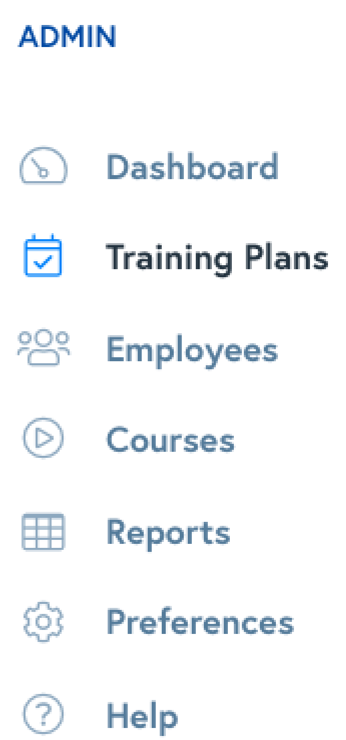




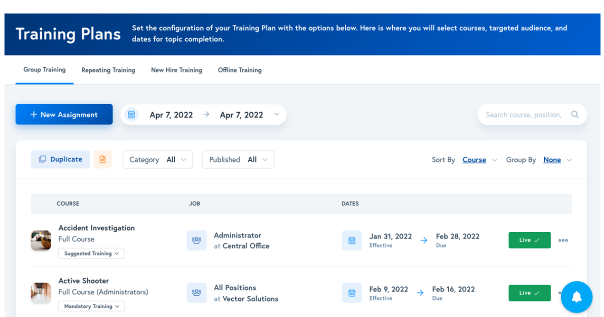
The **Dashboard** section is where administrators can get a quick overview of recent course completions and feedback from their users.

- You can access our **message center** by clicking on the notification bell in the bottom right corner of your screen.
- The message center is where you can keep up with announcements, new releases, product updates, webinars, and more.
- The graph link is simply a visual report representing current course assignments and completions over time.

Training Plans



The **Training Plans** section is where all group assignments are created. Courses can be assigned to any combination of positions and locations. The Training Plans section is divided into four main features: Group Training, Repeating Training, New Hire Training, and Offline Training.

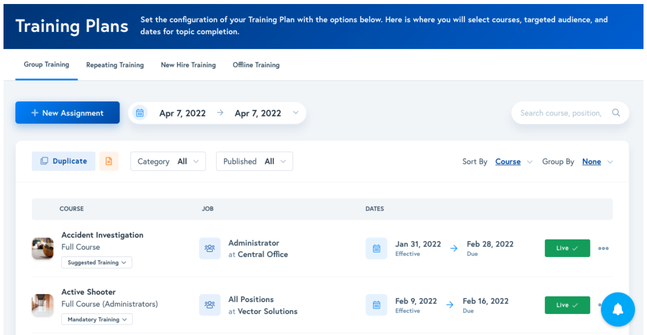


Group Training

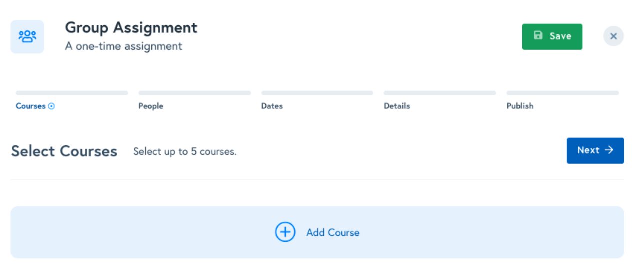
The **Group Training** feature is where administrators can assign training to a group of users based on the position and location they are associated with. To locate Group Training, click on the Training Plans icon in your navigation menu. You'll automatically land on the Group Training section. If your organization already has training assigned, the courses will appear in your list view. You'll be able to see the names of the courses, the positions and locations that are assigned to the courses, along with the effective date and due date.

- The **effective date** is when you want the course to be accessed by your users.
- The **due date** is when your users are expected to complete the training.
- The **live** button means the course has been published and is currently active.
- The **published** button means the course has not been activated yet. If you click on publish, the course will go live and the users associated with it will have access to the assigned training.
- Clicking on the **3 dots** next to the live button will allow you to edit the course, edit the people assigned to the training, edit the dates, duplicate the course, or even delete it.
- And you'll also be able to filter the assignment list by searching for a specific course or by adjusting the dates above.
- The **date filters** are helpful when searching for courses assigned in the past.

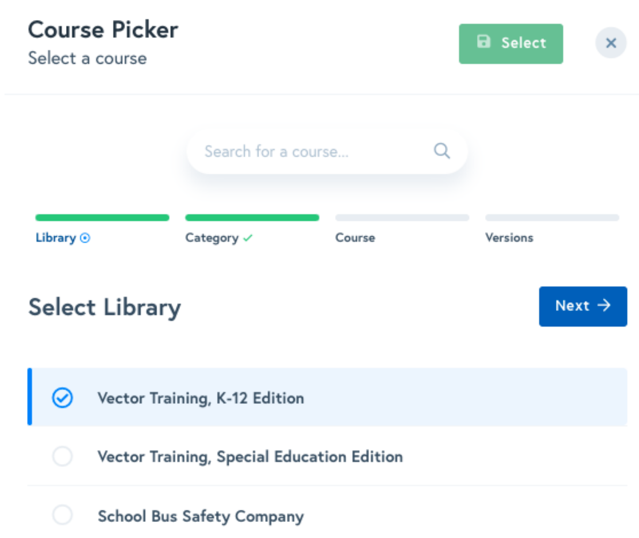
How To Assign Group Training



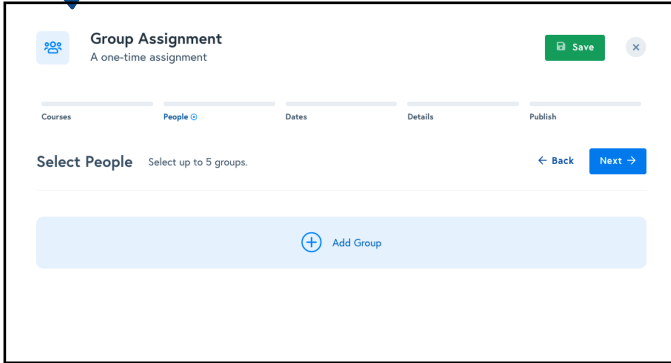
1. Click on the **New Assignment** button.



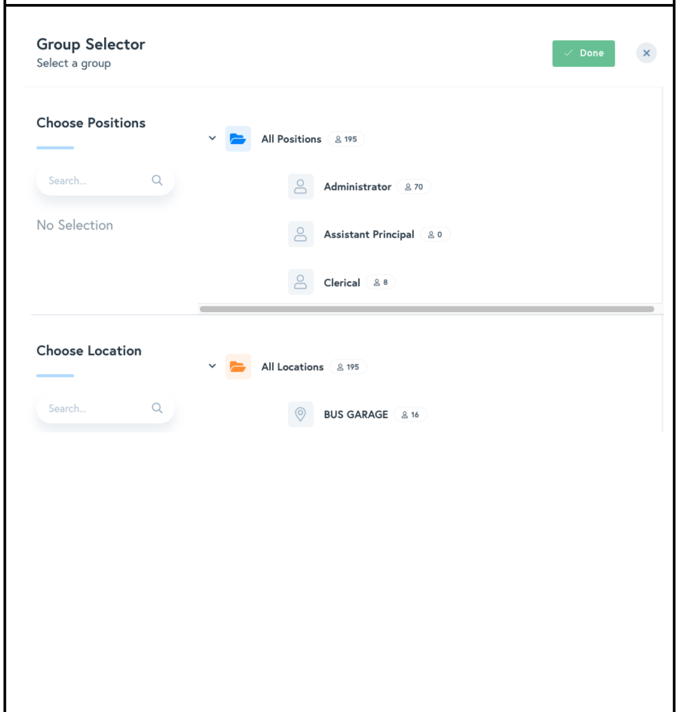
2. Then click on the **Add Course** button.



3. Search for the course you'd like to assign by using the search bar above or by clicking on the library and category the course belongs to.
   - Click on the course and choose the specific version you want to assign. Then hit **Select**.
   - You can add an additional course to your assignment, or move on to the next section by clicking **Next**.

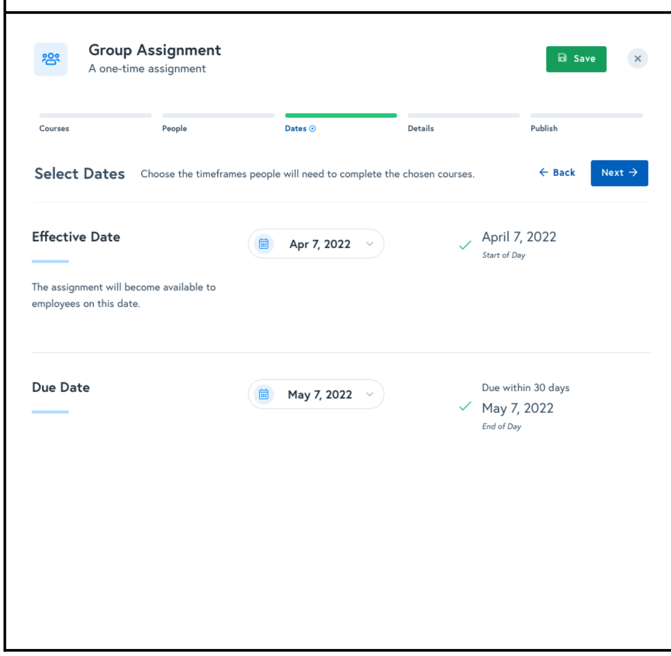


4. The People Section is where you'll click **Add Group** to determine who receives the assigned training.



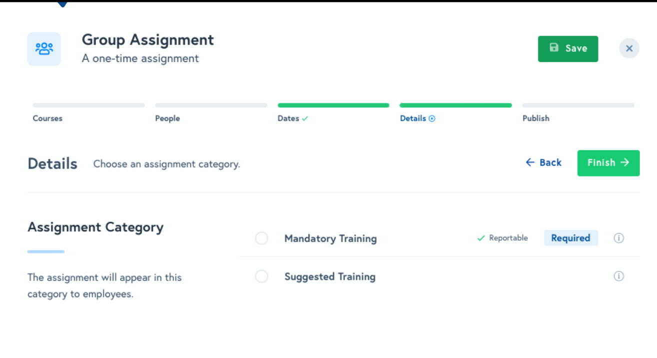
5. You'll assign training to users who are associated with a specific position and location.

- You can search for positions and locations by scrolling through the lists or by using the search bars.
- You can also see how many users are associated with that specific position and location. Once you have the position and location selected, scroll up and hit **Done**.
- If you want to add an additional group of users to the training list, click back on the add group button. Then go through the same process of selecting the position and location for the new group. If you realized you selected the wrong position and location, click on the trashcan icon next to it.
- To assign the course to all of the users at your organization, select **All Positions** and **All Locations**. This will ensure that every user in your Vector LMS database receives the training.

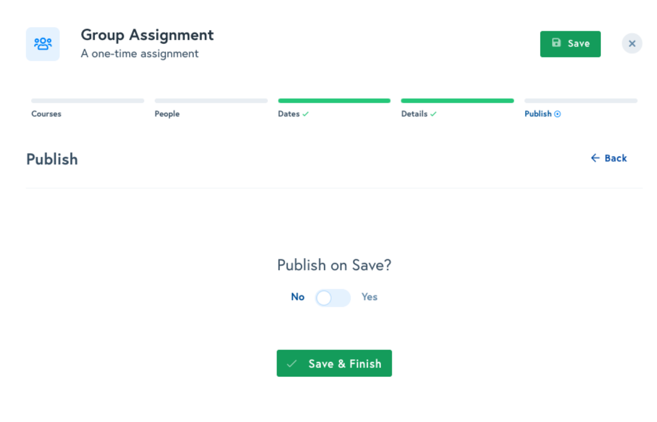


6. Click **Next** to set up your assignment dates.

- Again, the effective date is when users will be able to access the training.
- The due date is when your users are expected to complete the training.
- The expire date is when the training will no longer be accessible. If you want to give your users a grace period, set the expire date past the due date so that they can still access the training after it's due. Users will only see the due date for the training and won't know when it expires.



7. Click **Next** to select the assignment category or type of training that is being assigned. Then click on the **Finish** button

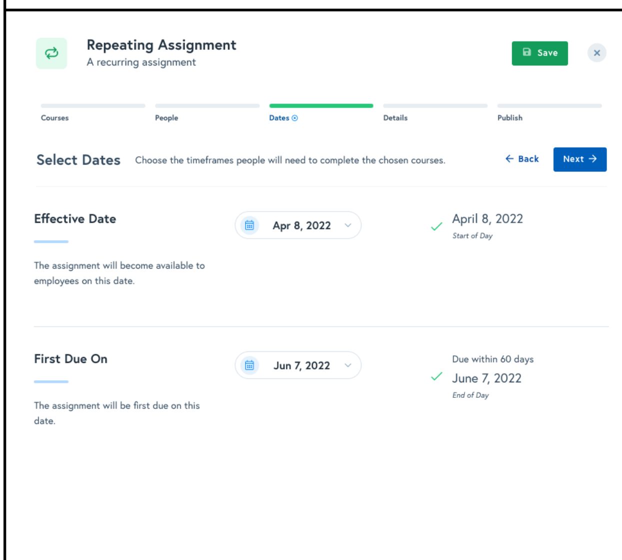


8. If you're only setting up the training and don't want users to have access to it yet, leave this option toggled on No.

If you want users to have access to the training immediately, then toggle the selection to Yes. Hit **Save** & **Finish** and that course will appear in the list with the rest of the assigned training.

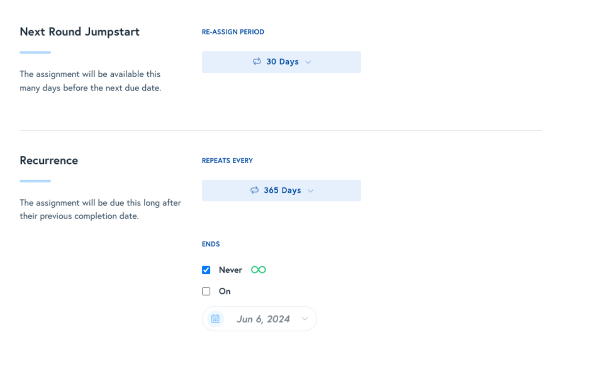
Repeating Training

The **Repeating Training** feature allows administrators to set up recurring training for a group of users based on the position and location that they are associated with. You only need to set a repeating training plan up one time. Then the system will automatically assign annual training every year on its own without your needed assistance. To locate Repeating Training, click on the Training Plans icon in your navigation menu. Then click on the Repeating Training tab above.



Repeating Training plans are set up exactly like Group Training plans (refer to pages 5-7). The only difference is the date selection options for Repeating Training (page 7, step 6).

- The **Effective Date** is when users will be able to access the training.
- The **First Due On** date is when your users are expected to complete the training.
- The **Next Round Jumpstart** date is the next time you want that course to be assigned.
- **Recurrence** is how often you want the training to be reassigned after the

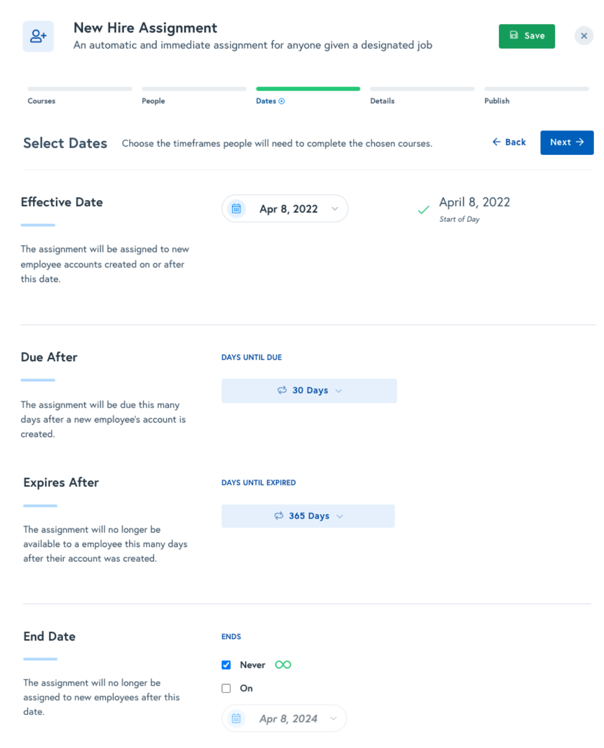


Next Round Jumpstart. You can customize the frequency or select from the pre-existing options.

- If you don't want the Repeating Training plan cycle to end, check **Never**.
- If you do want it to end at some point, check **ON** and add a specific end date. Hit **Next** when you're finished populating the dates.

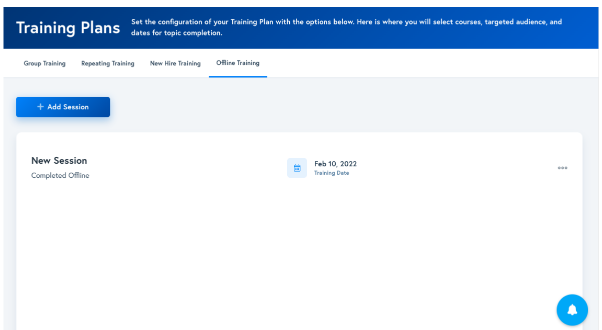
New Hire Training

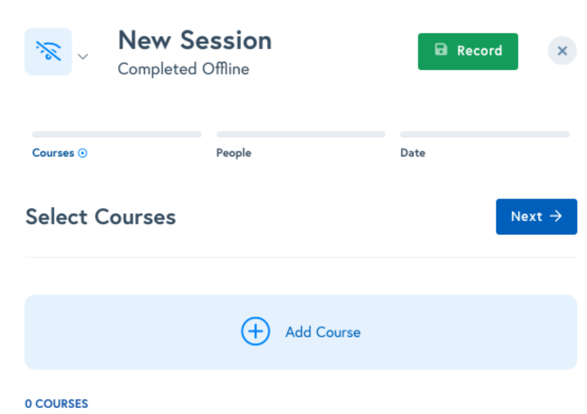
The **New Hire Training** feature allows administrators to set up training that only needs to be completed by new users. You only need to set a new hire training plan up one time. Then the system will automatically assign training to new users that are entered into your Vector LMS training site without any additional needed assistance on your end. To locate New Hire Training, click on the Training Plans icon in your navigation menu. Then click on the New Hire Training tab above.

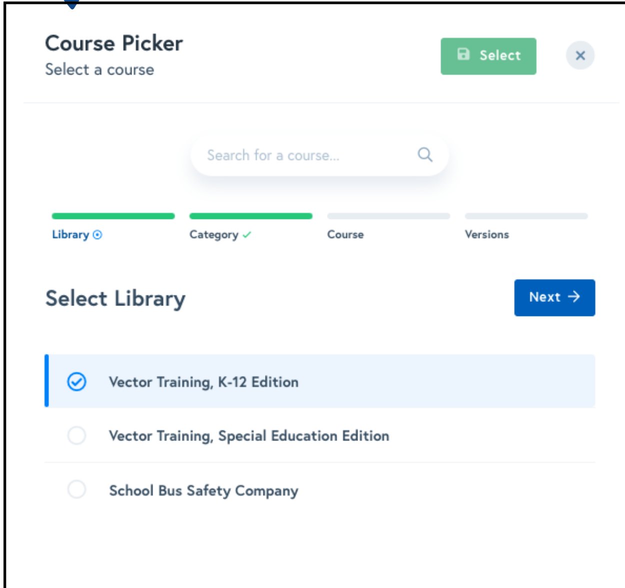


New Hire Training plans are set up exactly like Group Training plans (refer to pages 5-7). The only difference is the date selection options for Group Training plans (Step 6).

- The **Effective Date** is when you want the new hire training plan to start.
- **Due After** represents the number of days new hires will have to complete their training.
- Each new hire will have X amount of days after their hire date (which is listed in their profile) to complete their training.
- **Expires After** is when the user will no longer be able to access the training.
- If you want to give your new hires a grace period, extend the Expires After date past the Due After days so that they can still access the training after it's due.
- New hires will only see their due date for the training and won't know when it will expire.
- If you don't want the New Hire Training plan to end, check **Never**.
- If you want the New Hire Training plan to eventually end, check **ON** and add a specific end date.

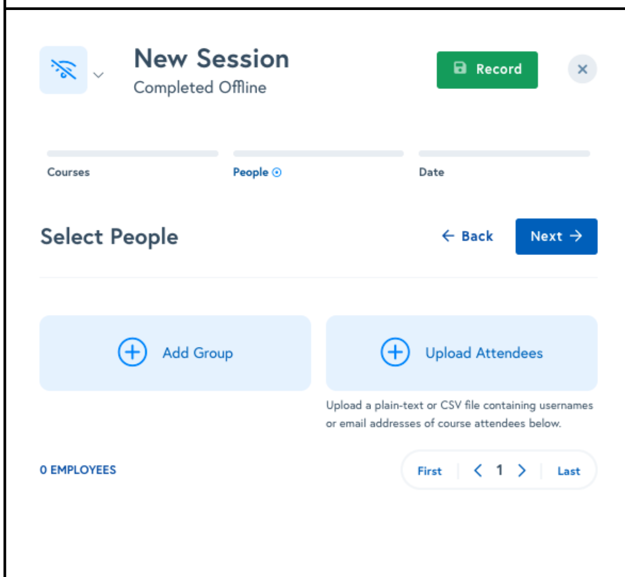
<table>
<tr><th colspan="2">Offline Training</th></tr>
<tr><td colspan="2">The Offline Training feature allows administrators to record training completed outside of the Vector LMS, such as in-service days, on-site training, or group training sessions. The feature also allows administrators to exempt a group of users from having to take training assigned within the Vector LMS. To locate Offline Training, click on the Training Plan icon in your navigation menu. Then click on the Offline Training tab above.</td></tr>
<tr><th colspan="2">How To Set Up Offline Training</th></tr>
<tr><td>
</td><td>1. Click on the Add Session button.

Then click on the icon to the left of the New Session's title to choose if you will be recording completions or exemptions for this session.
Rename the session by clicking directly on the title and typing in a new title that works for you.
</td></tr>
<tr><td>
</td><td>2. Then hit Add Course to select the course you want to issue completions for.</td></tr>
</table>



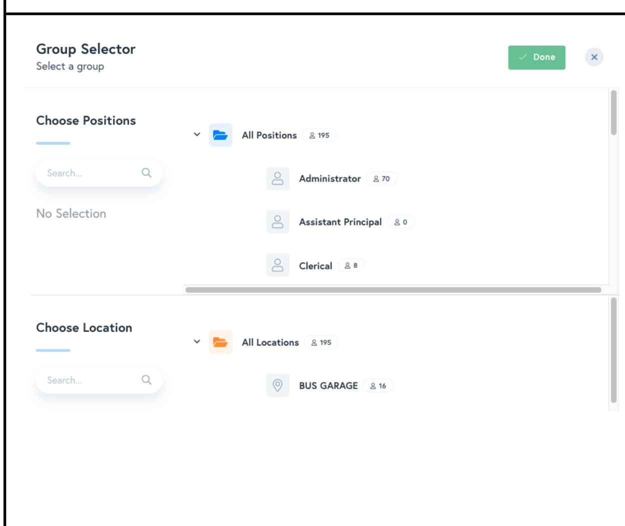
3. You can search for the course by using the search bar or by clicking on the library and category the course belongs to.

- Click on the course and choose the specific version you want to assign. Then hit **Select.**
- You can add an additional course to this session or move on to the next section by clicking **Next**.



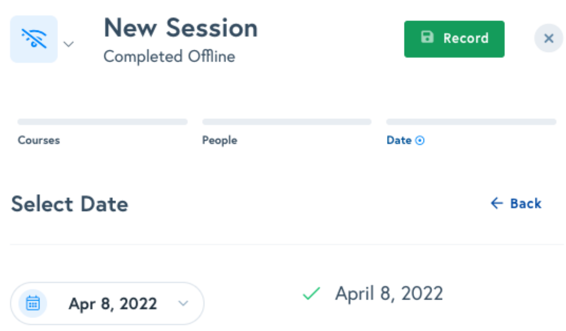
4. The People Section is where you'll determine who receives the completions. There are two ways you can add users to the offline training session:

- One way is to upload a CSV spreadsheet. The spreadsheet should only include one column and that column can contain all of the users' email addresses or usernames.
- The emails or usernames in the spreadsheet must match what is listed in their Vector LMS account.

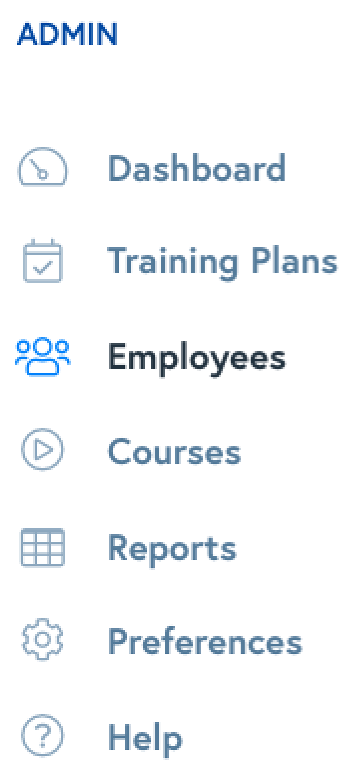


5. The other way is to add a group of users by selecting the position and location they are associated with.

- You can search for positions and locations by scrolling through the lists or by using the search bars.
- You can also see how many users are associated with that specific position and location. Once you have the position and location selected, scroll up and hit **Done**.
- If you want to add an additional group of users to the offline training session, click back on the add group button.

<table>
<tr>
<td></td>
<td>Then go through the same process of selecting the position and location for the new group.
● If you need to remove users from the list, simply click on the trashcan icon next to their name and hit Confirm.</td>
</tr>
<tr>
<td>
</td>
<td>6. Click Next and select the date of completion or exemption for the offline training session.

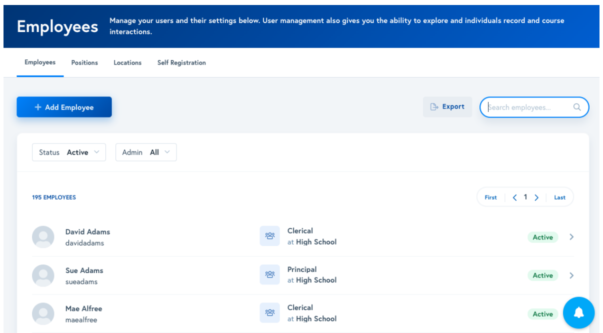
7. The final step is to click the Record button which will issue out the completions or exemptions.</td>
</tr>
</table>

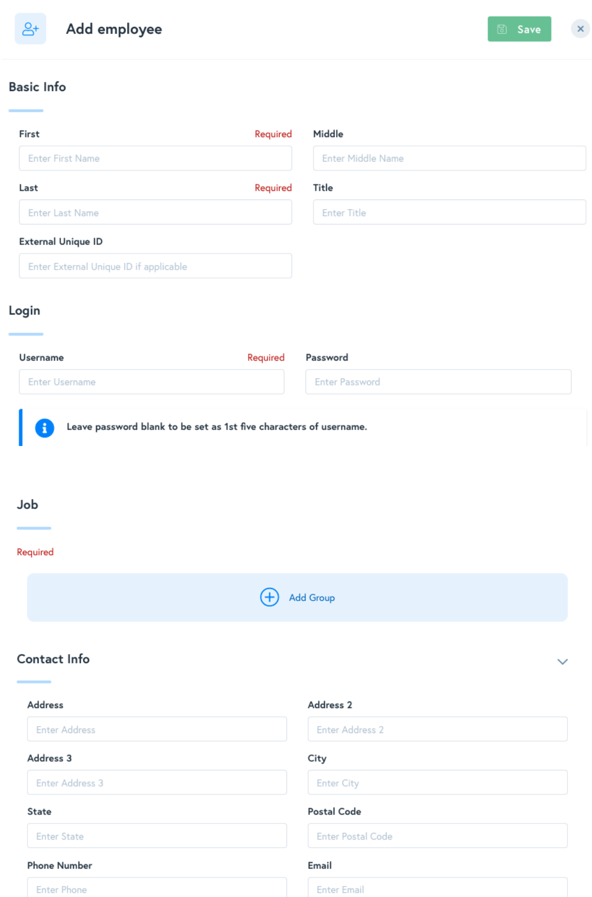
<table>
<tr>
<th colspan="2">Employees</th>
</tr>
<tr>
<td>
</td>
<td>The Employees feature allows administrators to manage the user data in their site. To locate Employees, click on the Employees icon in your navigation menu.

When you land on the Employees tab, you'll see a list of all the users you have access to. The list will display their names, usernames as well as the positions and locations they are associated with.
● You can locate users by scrolling through the list or by using the search bar above.
● You can also export the user data into an excel spreadsheet by clicking on the Export button in the top right corner of your screen.
● The list of users can be filtered</td>
</tr>
</table>

based on their account status or the type of admin permissions they have. **Account Statuses** for users will be listed in the column to the right.

How To Add A New User



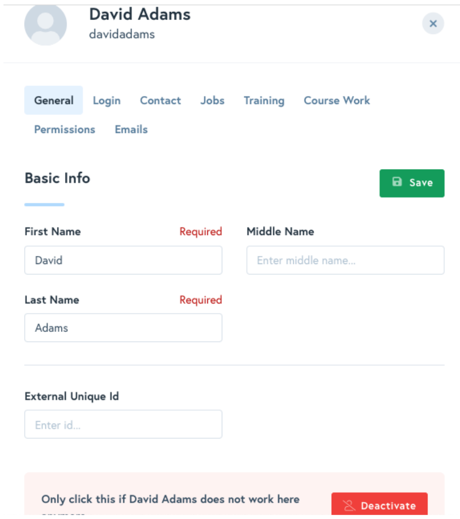
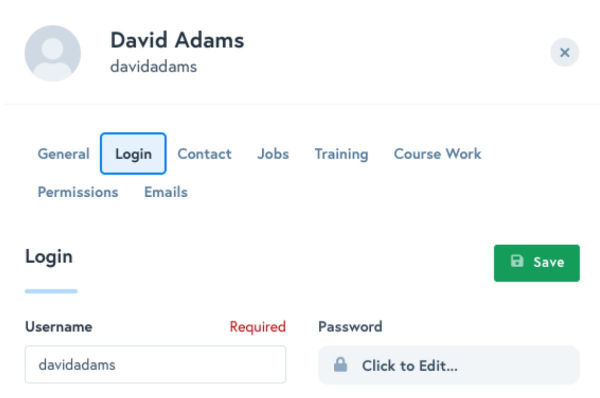


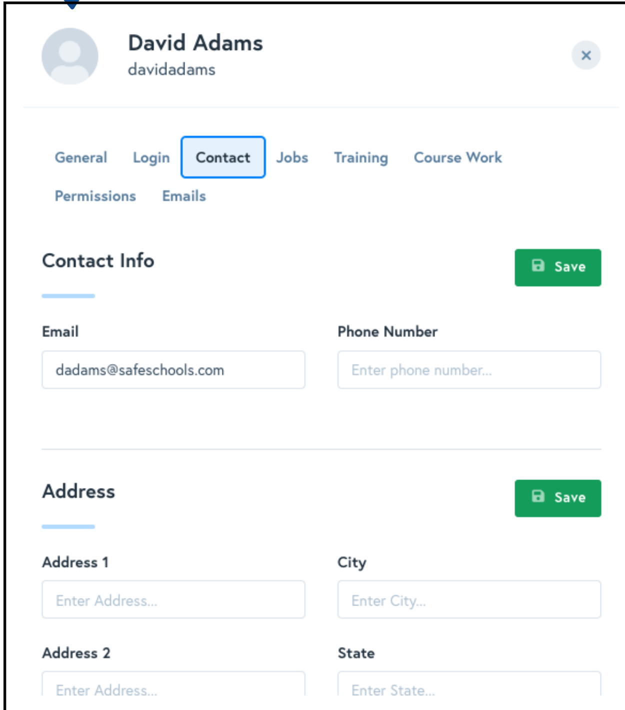
To add a new user to your database:

1. Click on the **Add Employee** button. There are mandatory fields you'll need to populate in order to create an account. Those fields will have 'Required' next to them.
2. You only need to populate the First, Last, and Username fields in this section. However, it's recommended to add an email address if you want the user to receive emails from the system.
3. The job section is where you'll add the position and location the user is associated with. Click on the **Add Group** button and select the user's position and location. Then click **Done**.
4. The next section is where you can add the user's contact information. There aren't any required fields in this section. However, it's recommended to add an email address if you want the user to receive emails from the system.
5. Then finalize the account creation by scrolling up and clicking on the **Save** button.
6. The new account will be added to the database with the rest of the users.

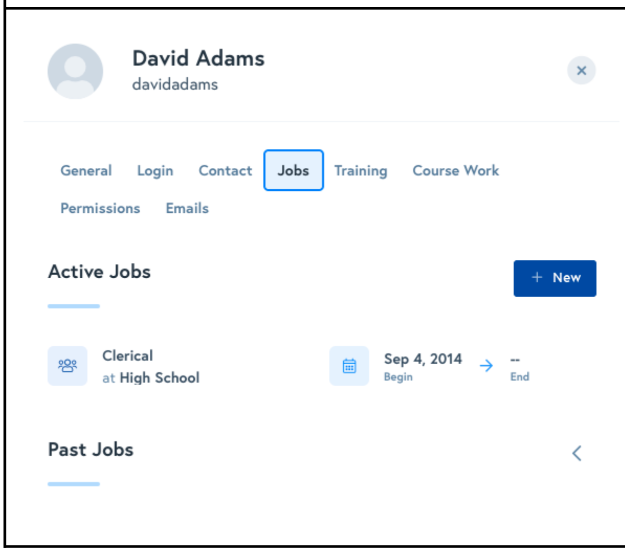
Editing Users

You can edit the profiles of your existing users. Profile's are divided into multiple tabs:

	The **General** tab is where you can make name changes or **deactivate** the user's account.
	The **Login** tab is where you can update the user's username.

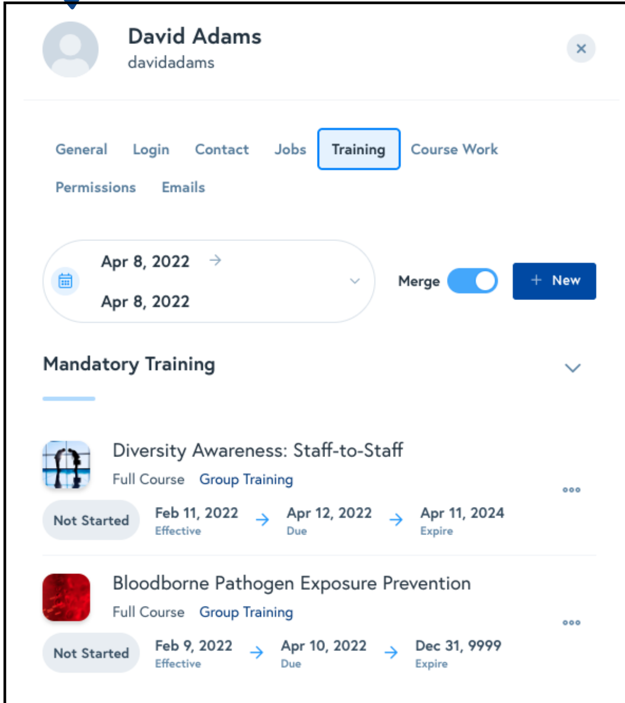


The **Contact** tab is where you can change a user's email address or contact info.



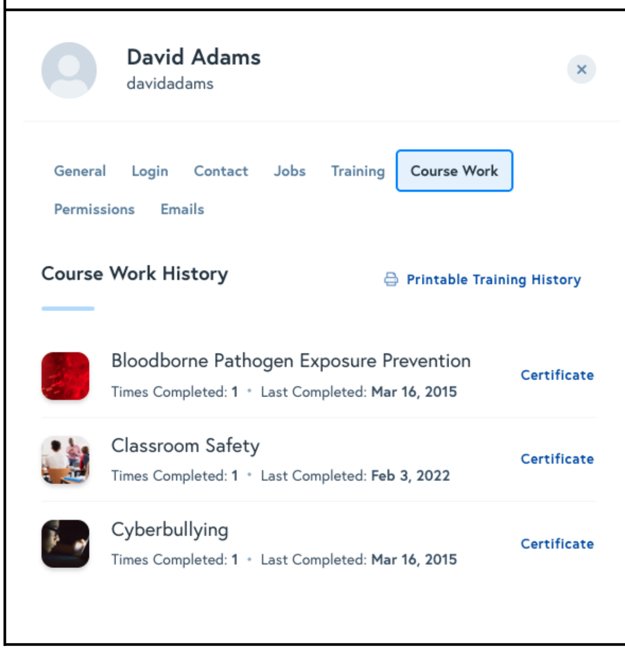
The **Jobs** tab is where you can add additional positions and locations to the user's profile.

- You can also view their previous job history or add an end date to their existing job if you want it to deactivate from their profile on a specific date.

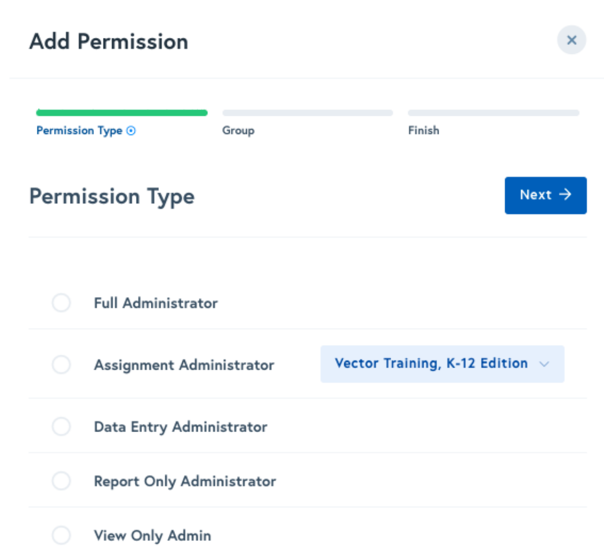


The **Training** tab is where you can see the courses that are currently assigned to the user.

- If you need to give the user a course completion or exemption, you can click on the three dots next to the training, select **Edit Assignment**, and then change the course status.
- You can also assign additional training to that user by clicking on the **New** button and populating the necessary fields.



The **Course Work** tab is where you can view and print the user's training history and access their completion certificates.



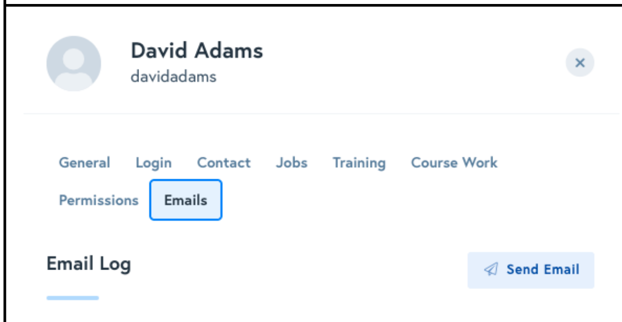
Permissions

The **Permissions** tab is where you can give administrative access to a user. There are five types of admins:

1. **Full Administrator** will have complete admin access over the site.
2. **Assignment Administrator** gives permission to create assignments from a specific course library.
3. **Data Entry Administrator** gives permission to add or deactivate users.
4. **Report Only Administrator** gives permission to run reports.
5. **View Only Admin** gives permission to view data in the site but not change it.

Select the permission you'd like to grant, then add the group of users you want the admin to have access over.

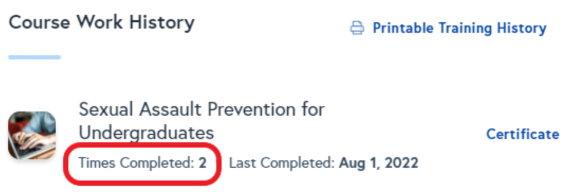
- For example, you can make an admin a full administrator over a specific position and location. That admin can only assign training and manage data for that group of users. If you want the admin to have permissions over all users, simply select all positions and all locations.
- Then click **Next** to finish adding the permission.
- You can also add additional permissions to a user's profile. Or you can remove existing permissions by clicking on the trashcan next to it.



The **Emails** tab is where you'll be able to see the automated emails that were sent out to the user. The Send Email button is where you can manually resend an assignment reminder email to the user.

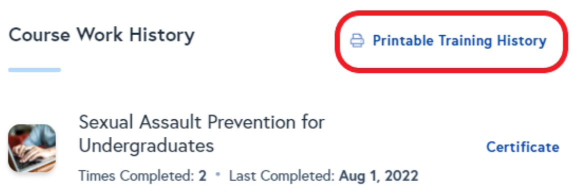
How To View A User’s Training History

Completion Summary

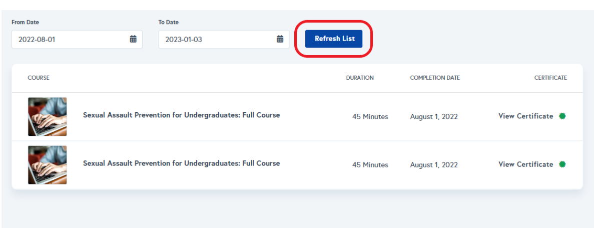


1. Click on the ‘Employees’ or ‘Learners’ icon in your navigation menu.
2. Search for the user's first, last, or username and click on the user’s information to open their profile.
3. Click on the ‘Course Work’ tab.
4. Click on the ‘Course Work’ tab where you will see a summary of the coursework history.
    a. Note: The summary information is included under the course title and will note the number of times a user completed the course and their last completion date.

Completion Details



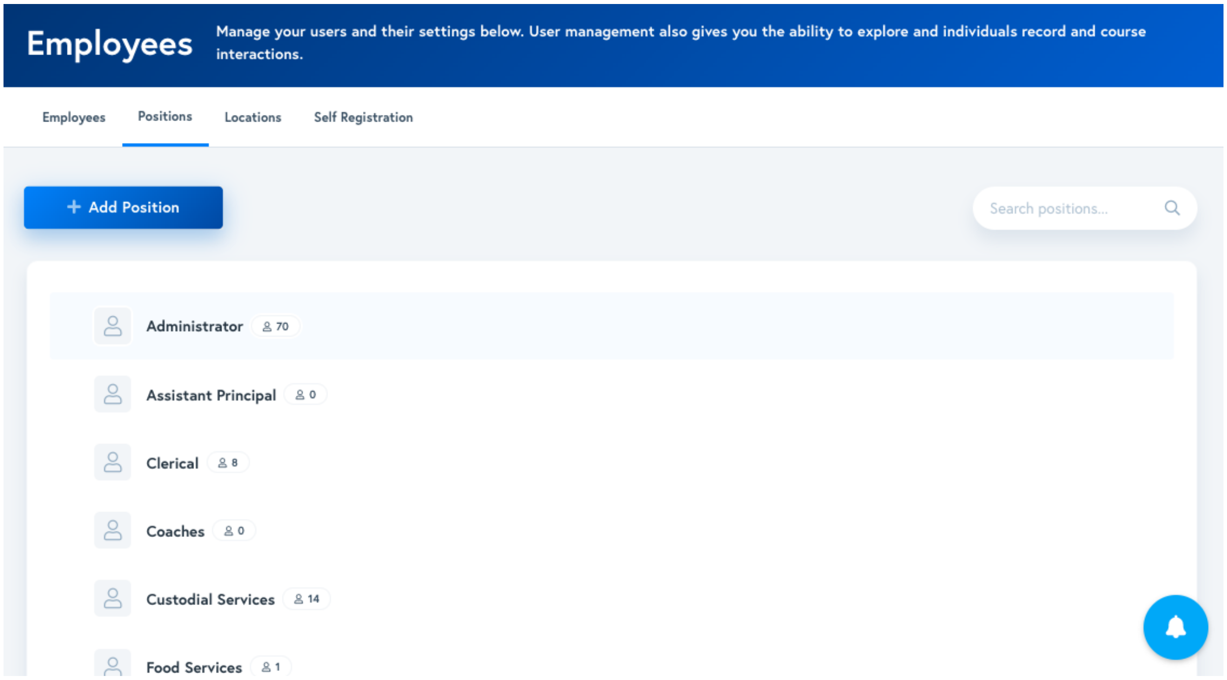
1. If you’d like to see each completion date and certificate, follow the **Completion Summary** instructions above, and then click Printable Training History in the upper right-hand corner.



2. Adjust the dates to encompass the range of completions you’re looking for and click ‘Refresh List’. You will now see a full list of training history, completion dates, and certificates of completion.

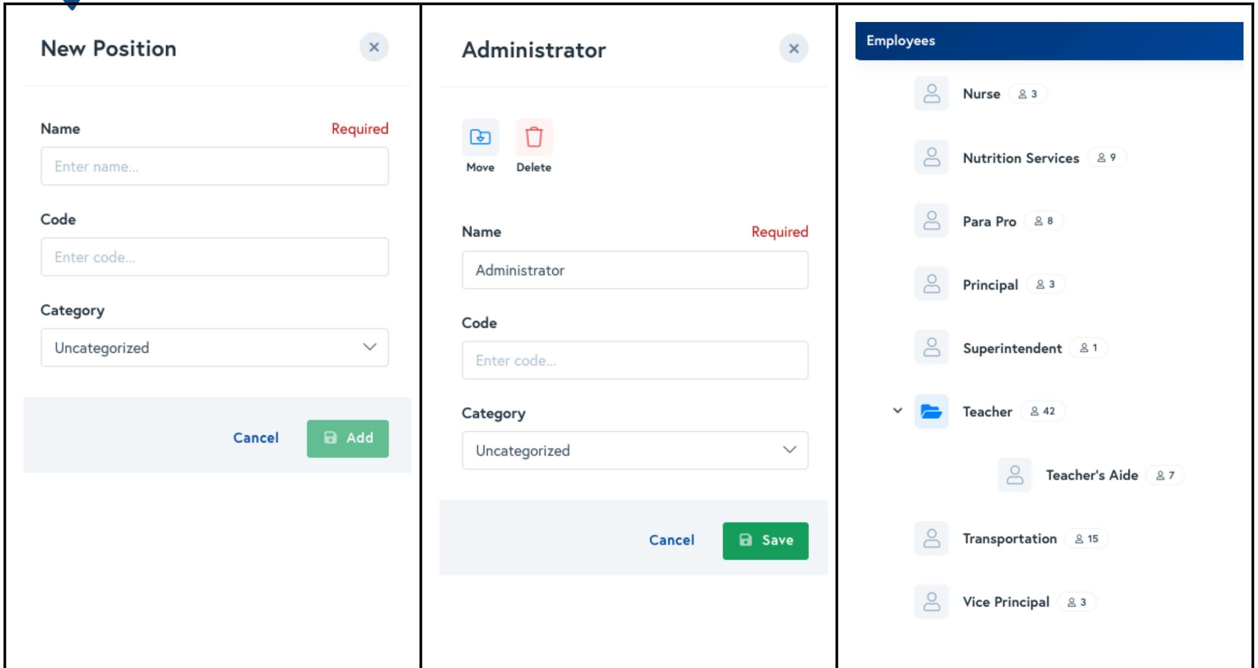
Positions & Locations

How to add, edit, and manage the positions & locations in your site.



- Click on the **Employees** icon in your navigation menu. Then click on the **Positions** tab above.
- When you land on the Positions tab, you'll see a list of all the existing positions along with the amount of users associated with them.
- You can look for positions by scrolling through the list or using the search bar above.
- You can also **create a new position** by clicking on the Add Position button and populating the required info.
- If you need to **edit an existing position**, click directly on the position and make the necessary updates.
- You can also grab and drop the position under another position to create a position tree. **Position trees** allow you to group multiple positions together. Which is handy for assigning training to a specific group of positions.

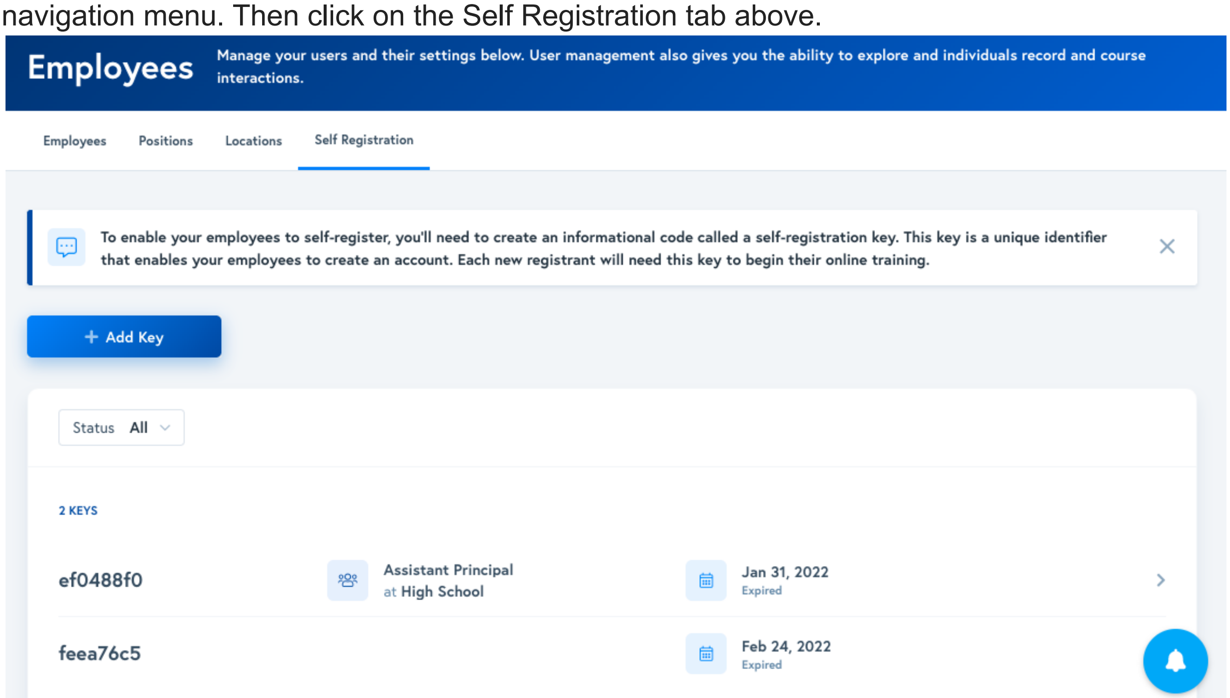
Creating New Position	**Editing Existing Position**	**Position Tree**

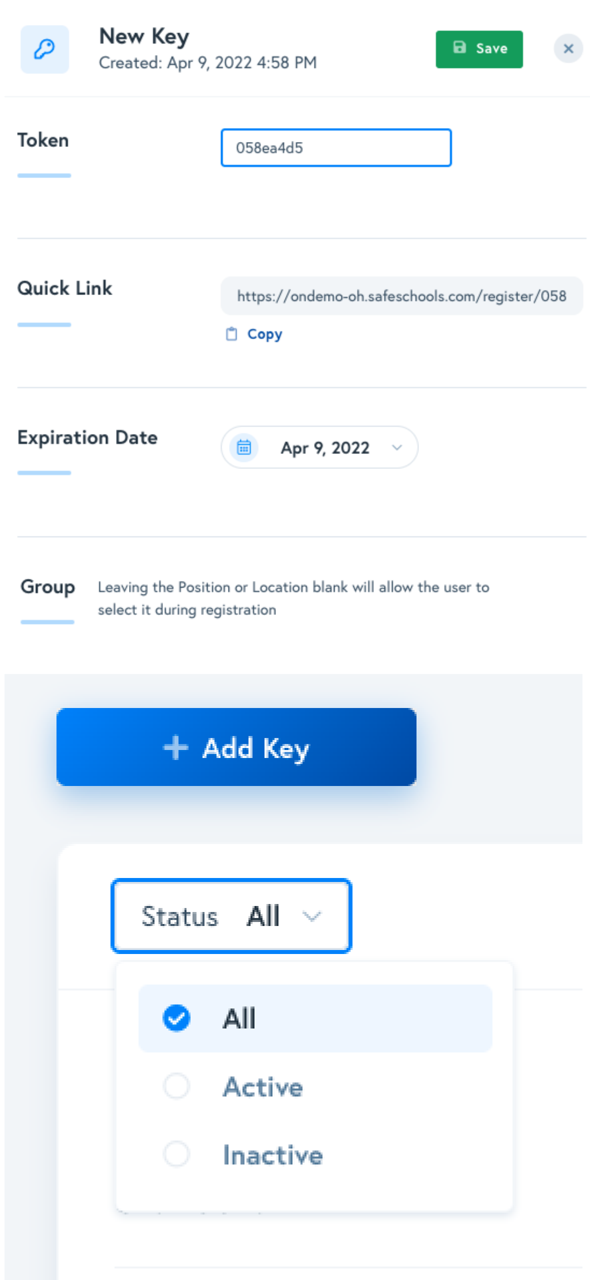


The **Locations** section functions the same way as the Positions section. You can add, edit, and search for locations. You can also group locations together by creating location trees.

Self Registration

Self Registration is an optional feature that allows users to create their own account in the Vector LMS site. To locate the Self Registration feature, click on the Employees icon in your navigation menu. Then click on the Self Registration tab above.

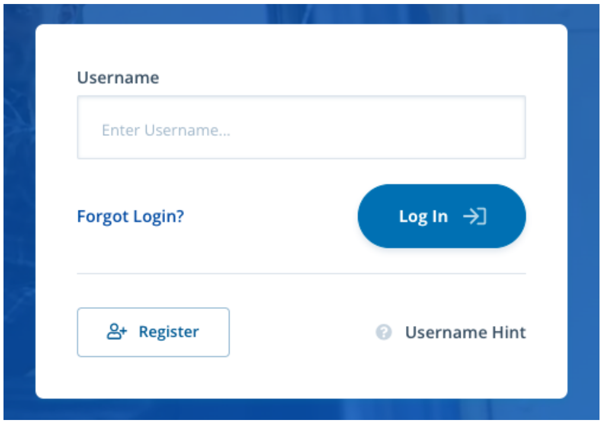




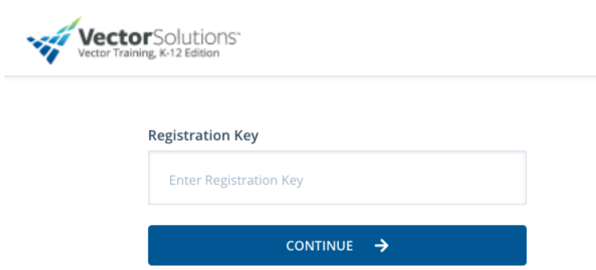
To set up self registration, you'll need to click on the **Add Key** button. That will create an informational code called a self registration key.

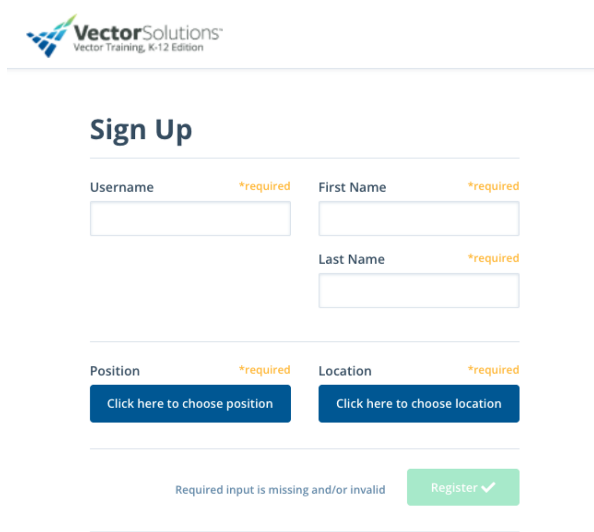
- This key or **token** is a unique identifier that will be needed when your users create their accounts.
- You can use the auto generated key orr you change it to something more suitable for your organization.
- The **quick link** is where your users will go to register their account so you'll want to send this link and the registration code to your users.
- The **expiration date** is when the registration key will no longer be active. You can set the date out as far as you'd like.
- Adding a **group** is optional but It allows you to associate a specific position and location with this registration key.
- For example, if you select administrator as the position and central office as the location, users who register with this key will automatically be assigned that position and location.
- You can create a registration key for each position in your database. Or you can create one registration key and opt not to add a group. This will allow your users to select their position and location while registering their account.
- Scroll up and click **Save** to finalize the self registration key. Your new key will appear in the list.
- You can filter that list to only see the active keys or you can reactivate an inactive key by extending the expire date.

How General Users Self Register

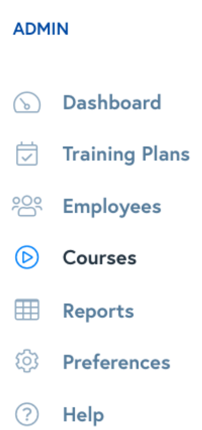


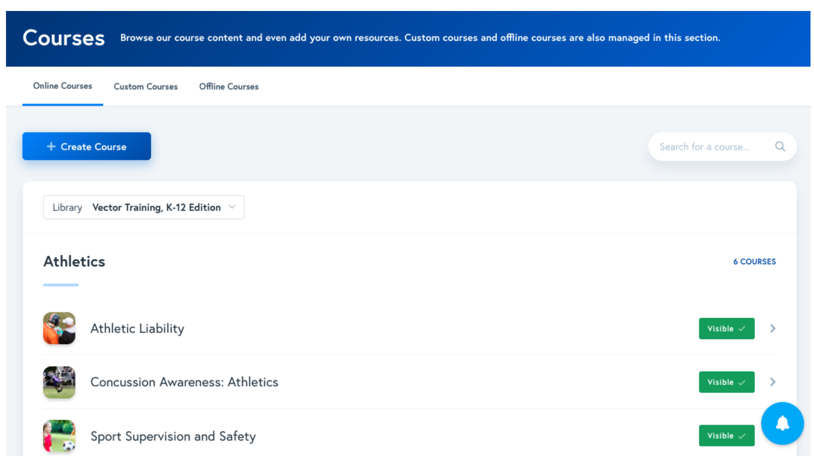
- Users will click on the Register button when they get to the login page
- They will type in the registration key and hit continue.
- They'll type in a username, first name, last name, and select the position and location they are associated with.
- Once the required fields are populated, they'll click on the **Register** button.
- From there, they'll be able to log into their new account to access their training.





Courses

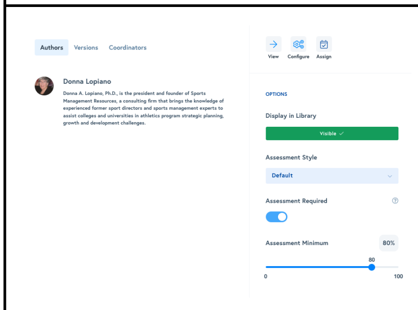


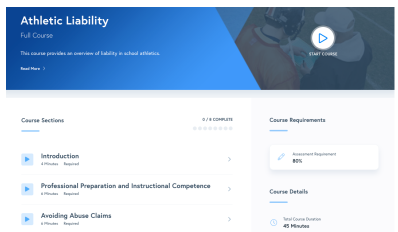


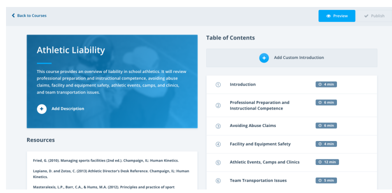
Online Courses

The **Online Courses** feature is where administrators can stream and manage the courses in their library. To locate Online Courses, click on the Courses icon in your navigation menu.

- When you land on the Online Courses tab, you'll see a list of all the courses you have access to.
- You'll be able to search for specific courses by scrolling through the list or using the search bar above.
- You'll also be able to switch between different course libraries, if your organization has access to more than one.
- The column to the right allows you to manage what courses your users have access to view.
- **Visible** means the course can be accessed as optional training by your users.
- **Hidden** means your users will not have access to take that course on their own. Clicking on **Hidden** will make the course visible again.

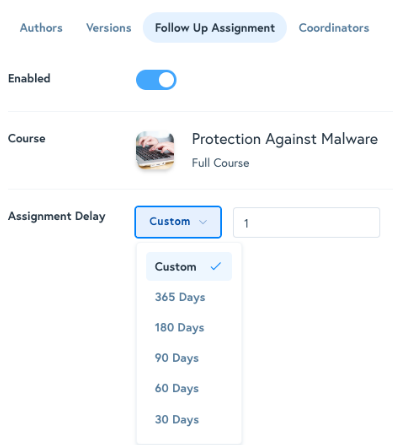






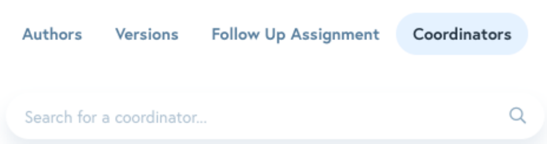
If you click directly on a course, you'll be able to see the name of the author and the versions of the course. You'll also be able to add **Follow Up Assignments** and **Coordinators** to the course.

Follow Up Assignments



Enabling the **Follow Up Assignment** option gives administrators the ability to postpone the start date of the assignment that comes right after the course is finished. The start date can be adjusted by clicking on the Custom button, and selecting the amount of days you want the assignment delayed after the course is finished. This will allow administrators to identify how Learners may have adjusted their attitudes, beliefs, or behaviors after having experienced their training and applying what they have learned in their lives.

Adding Course Coordinators



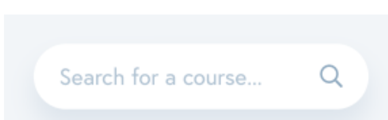
Use the search bar to look for users in your database, and then add them as coordinators for the course. This will make them the main contact for questions about the course.

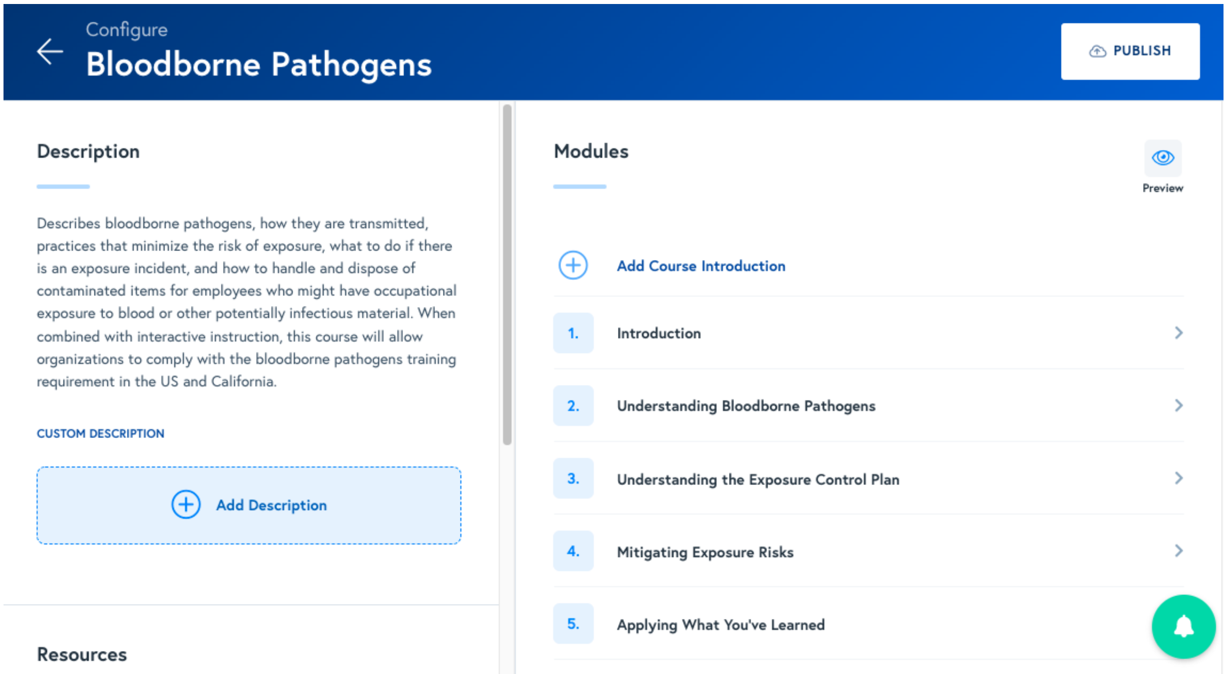
You can view, configure, or assign the course:

- Clicking **View** and accepting the disclaimer will take you into the course.
  - From there you can stream different sections of the course.
  - You can also view the course requirements, course details, resources, and the coordinators that were added.
- Clicking **Configure** will give you the ability to customize information within the course.
  - After adding the custom info, you'll be able to preview it and publish the changes you've made.
- Clicking **Assign** will allow you to assign the course as group training. To learn more about this process, refer to pages 5-7 of this guide.

You can also manage the course's visibility in the options section and you can decide if you want to require users to take an assessment at the end of the course. If you do require an assessment, you'll have the option to change the minimum passing percentage.

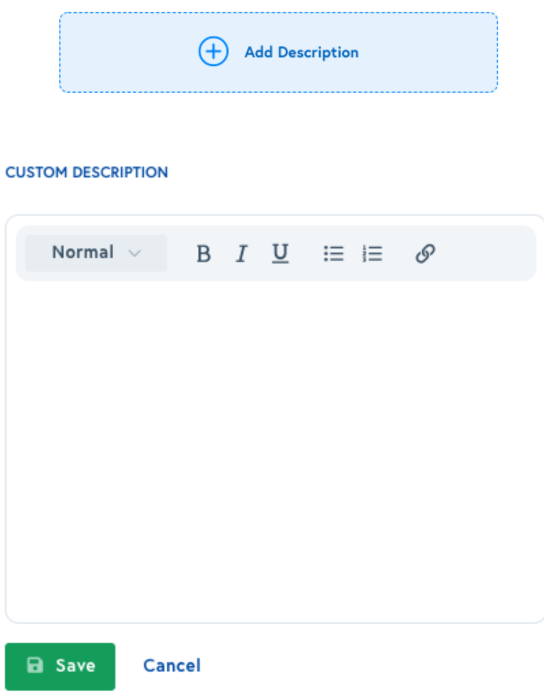
How To Configure Courses

	1. Click on the **Courses** section in your navigation menu. You will automatically land on the **Online Courses** tab.
	2. Use the search bar above to locate the specific course you want to configure.
	3. Click directly on the course and then click on the **Configure** button.

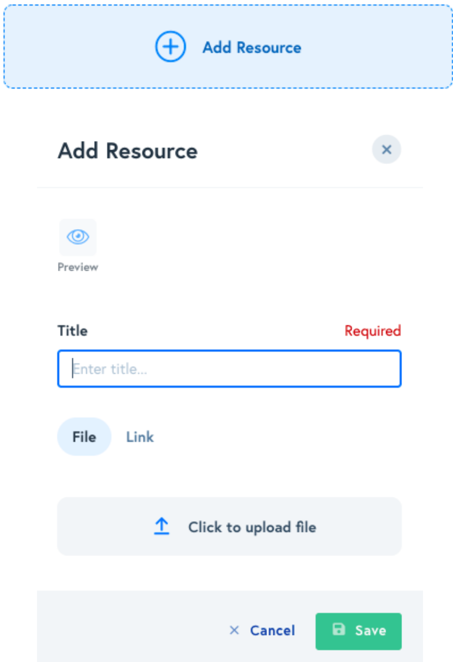


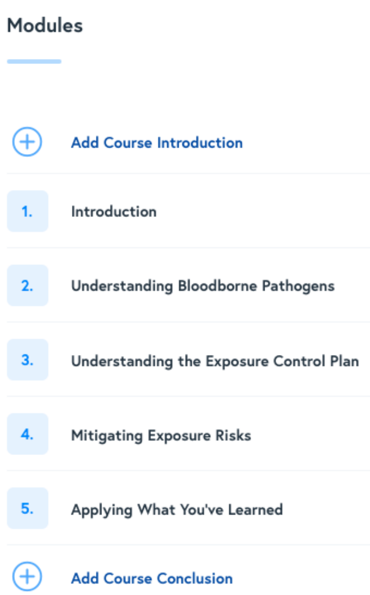
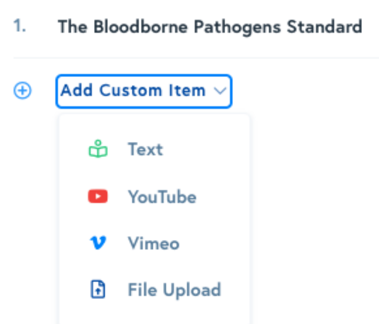
4. Your course will have 3 configurable sections: **Description**, **Resources**, and **Modules**. Let's go over each section.

Description



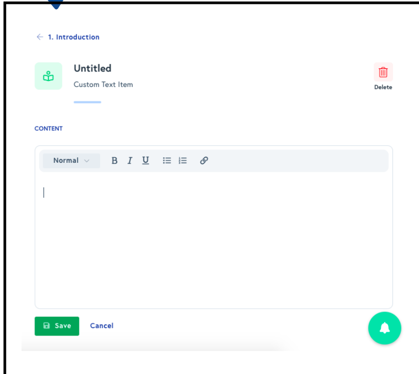
This section allows you to add additional information to the course description by clicking on the **Add Description** button. Users will be able to view the custom description when they start the course.

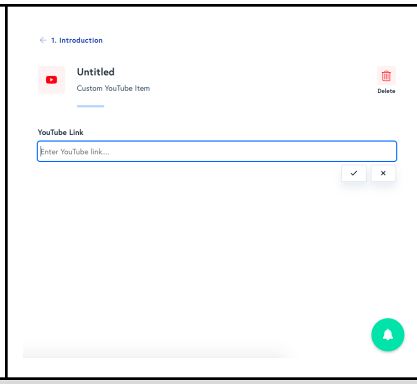
<table>
<tr><th colspan="2">Resources</th></tr>
<tr><td>
</td><td>This section allows you to attach or link resources to the course. When you click on the Add Resource button, you'll be able to upload a pdf file or add URLs that are linked to your resources. The resources you add will be accessible to users when they start the course.</td></tr>
</table>

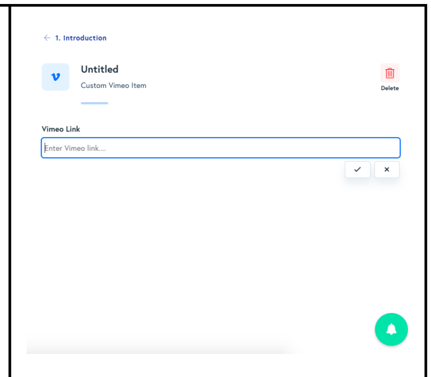
<table>
<tr><th colspan="2">Modules</th></tr>
<tr><td>
</td><td>This section includes all of the modules that are associated with the course. You can add a Course Introduction at the beginning of the modules and a Course Conclusion at the end of the modules. Depending on the course you are configuring, some modules will include custom items within them.


You can use the custom item feature to add Text, YouTube, and Vimeo videos to the modules. You can also Upload Files (E.g. policies, handbooks) or create custom Surveys.</td></tr>
</table>

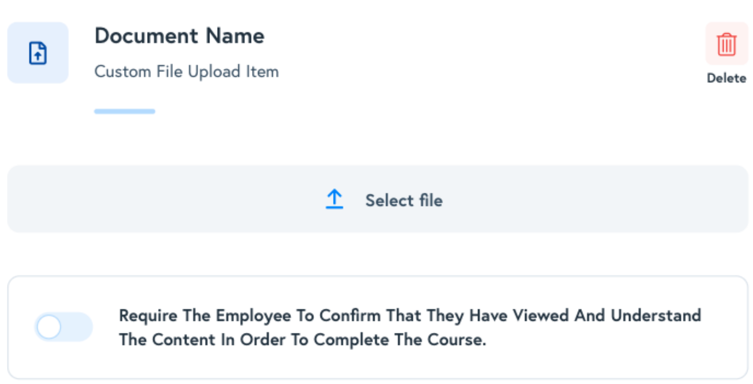
Text	YouTube	Vimeo







File Upload



Once you add your custom item, give it a title and then hit the **Save** button. You can add additional custom items to the module or edit the one you already added.

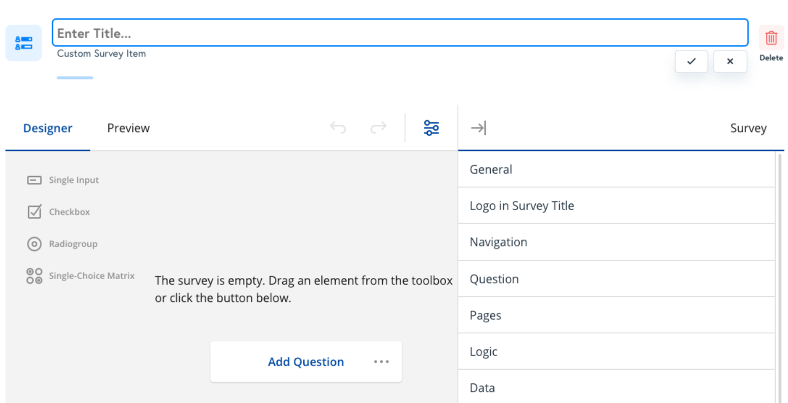
If you want to view a list of courses that have customizable modules, refer to our **[Course Map Overviews]** article in our Support Center.

How To Create A Custom Survey

Click on the 

button within a course module, and select the 

option.

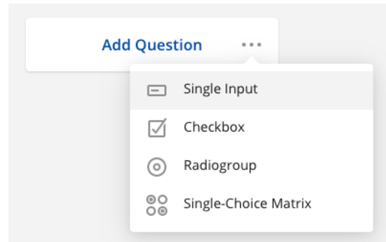


Enter the name of the custom survey in the title box.

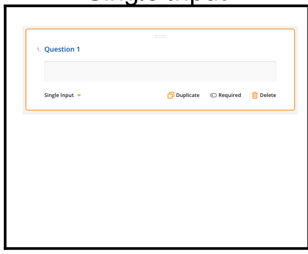
Click on the Designer tab to add questions to your custom survey.

Click on the ··· icon, and select the type of question you want to add. Then click directly inside of the question box to edit the question's title.

There are 4 types of questions that can be added to your custom survey:

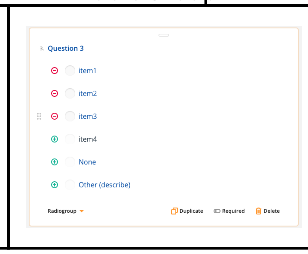


Single Input

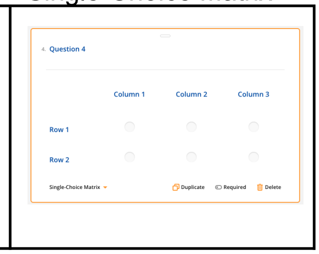


Checkbox

RadioGroup



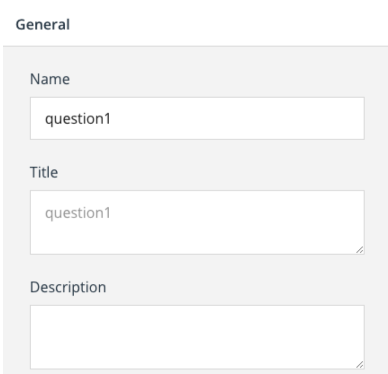
Single-Choice Matrix



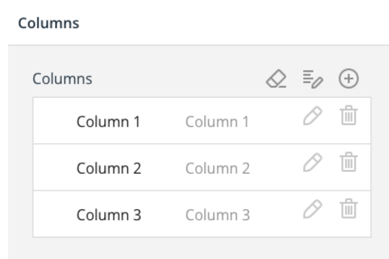
To edit or add more options to a question, select the question then click on the panel icon.

The collapsible panel →| will allow you to customize the information within each question. There are a variety of customizable sections within the panel:

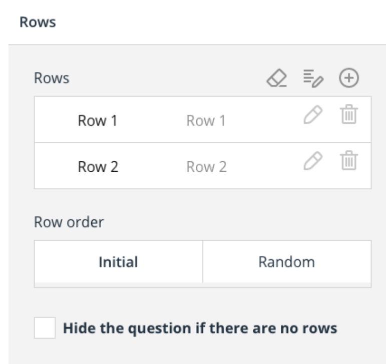
General: Edit the name, title, or description of the questions



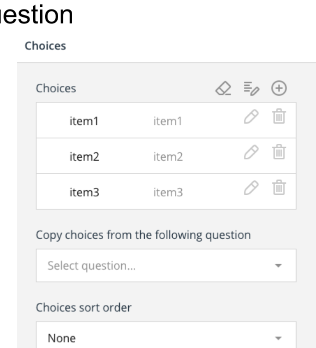
Columns: Add or remove columns from a matrix question



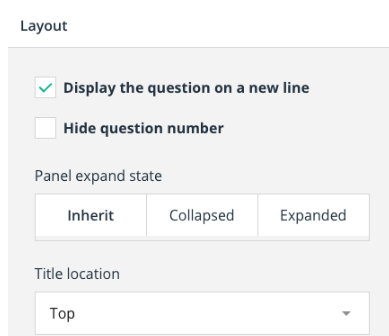
Rows: Add or remove rows from a matrix question



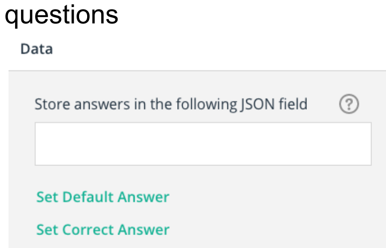
Choices: Add or remove options from a checkbox or radiogroup question

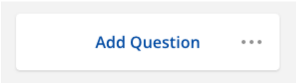


Layout: Adjust & organize the layout of your survey questions

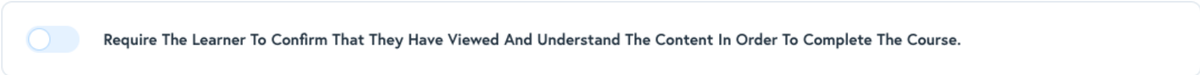


Data: Add default answers or correct answers to your survey questions





You can add as many questions as you want to your custom survey. You can also toggle on the **require** option if you want learners to confirm that they viewed and understand the content from the course.



When you're finished adding questions, scroll up and add the title of your survey. You can add a description to the survey title and upload a logo by clicking on the picture icon to the right.

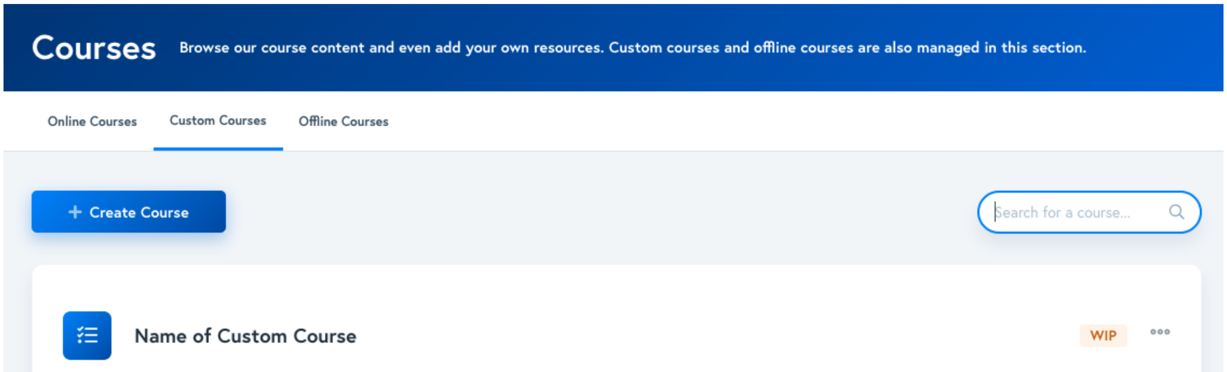
Select the Preview tab to view the custom course you created.

Then click on the 

button to add your custom survey to the course.

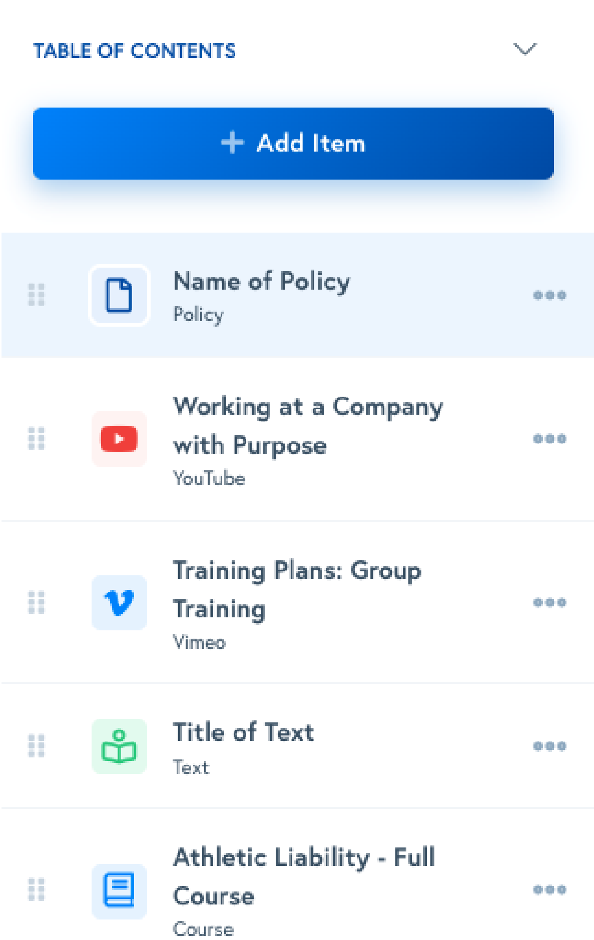
5. After configuring all of the sections in the course, scroll up and click **Preview** to see how the course looks from a general user's perspective.
If everything looks great to you, go back to the course settings and click on the **Publish** button above. This will activate the new version of the course so that it can be assigned to your users.

Custom Courses

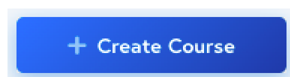


The **Custom Courses** feature gives administrators the ability to to create new courses in the Vector LMS. These courses can include policies, videos, assessments, and more. To locate Custom Courses, click on the Courses icon in your navigation menu. Then click on the Custom Courses tab above.

Creating Custom Courses



Start with clicking on the **Create Course** button.

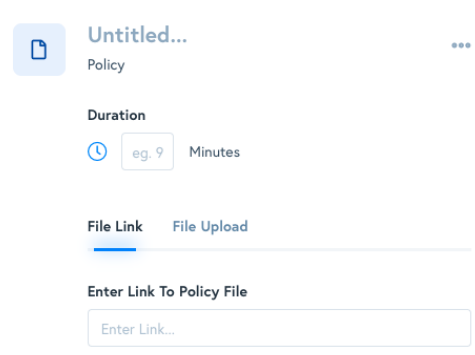


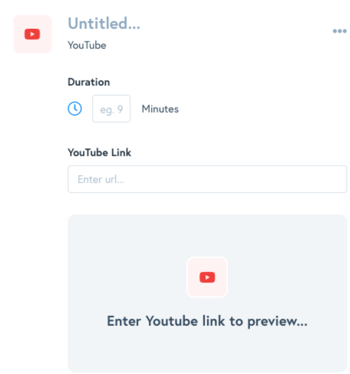
Add the name of your custom course. Then click **Done**. The name will appear on the header of your page.

The **Table of Contents** feature is where you'll build out the sections in your custom course. A new section will be created for every item you add.

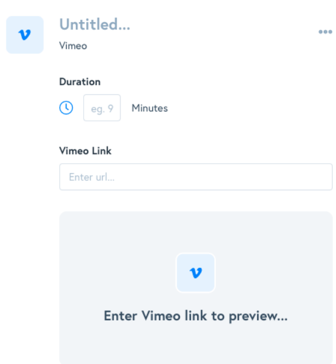
- You can add as many or as little items as you want to your table of contents.
- You can rearrange the order of the items in your table of contents by dragging and dropping.
- You can also edit or delete items by clicking on the three dots to the right.

Let's take a look at the types of items you can add to your table of contents.

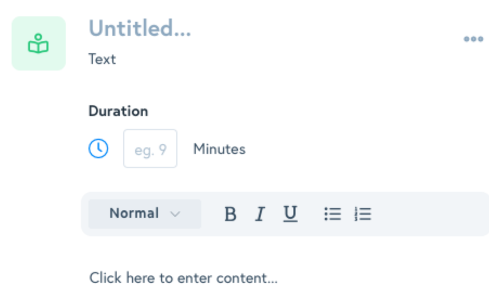
<table>
<tr><th>Policy</th><th>YouTube</th></tr>
<tr><td>


You can add a Policy item to your custom course. This item is typically used when admins want users to view and acknowledge specific documentation. You'll name the policy and add the estimated duration for reviewing the policy's document. If the document is hosted on a specific website, you can add the link to that site here. You can also upload a PDF file. You can open the advanced settings and change the default verbiage that goes before and after the document.
</td><td>


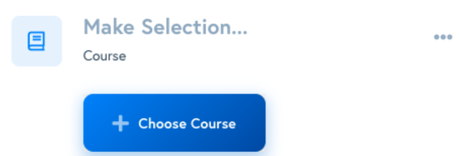
Another item that can be added to the table of contents is a YouTube video.

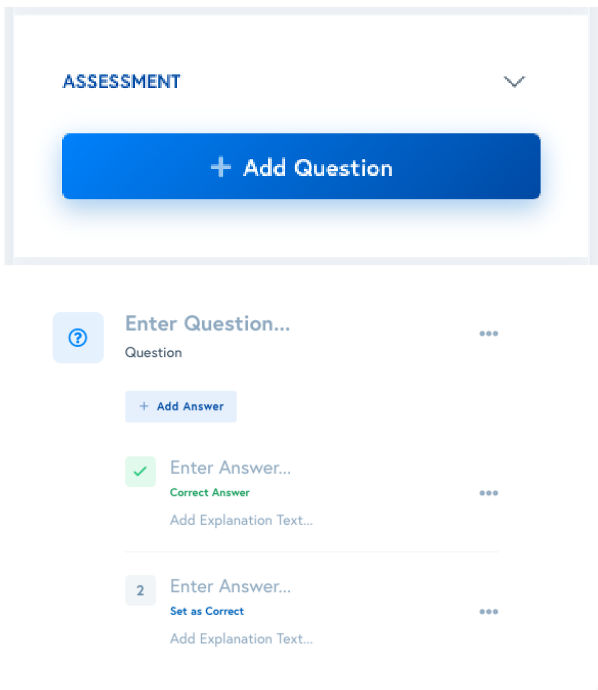
Pasting the link to your YouTube video will automatically populate the item's title and duration. However, you can edit the title and duration, if needed.
</td></tr>
<tr><th>Vimeo</th><th>Text</th></tr>
<tr><td>


Another item that can be added is a Vimeo video. This item is similar to the YouTube item.

Pasting the link to your Vimeo video will automatically populate the item's title and duration.
</td><td>


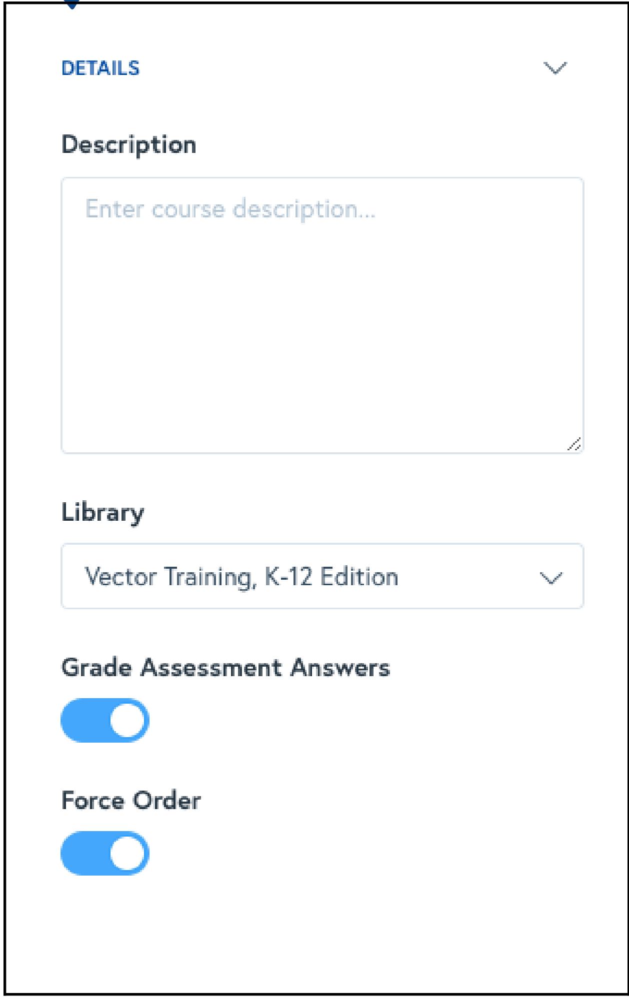
The Text Item allows you to add a message to your course. You'll add a title and duration, then add your message. The message can be customized with rich text format.
</td></tr>
<tr><th colspan="2">Add Course</th></tr>
</table>

<table>
<tr>
<td>
</td>
<td>The Add Course item allows you to take a course that already exists in your library and add it into your custom course.

This item is useful when you want to create a custom course that builds around an existing course.
You'll click on Choose Course, select the library, and course then hit the Select button to populate the course.
</td>
</tr>
<tr>
<th colspan="2">Assessment</th>
</tr>
<tr>
<td>
</td>
<td>The Assessment feature is optional but it allows you to create a custom quiz or survey at the end of the course.
To add an assessment to the custom course:

Click on the Add Question button.
Type in your questions, then populate the answers.
If needed, you can click on the Explanation Text field to add more detail to your questions.
After populating the answers, make sure the correct answer is set.

You can edit or delete questions by clicking on the three dots to the right and add as many or as few questions as you want.</td>
</tr>
<tr>
<th colspan="2">Details</th>
</tr>
</table>

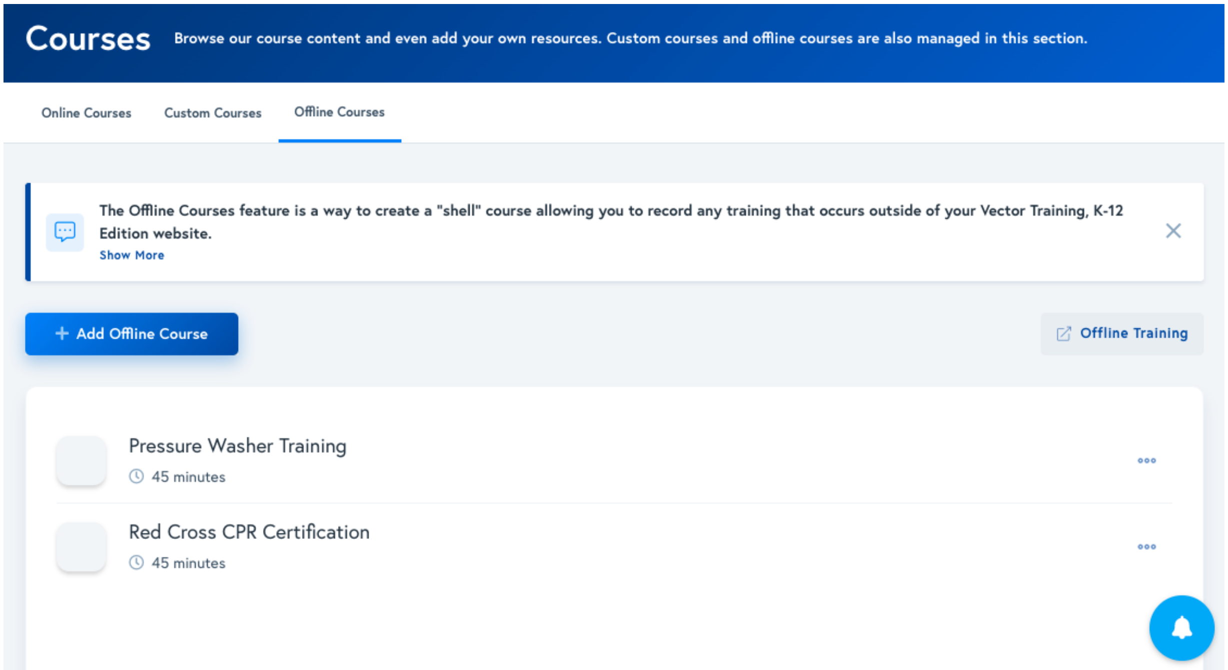


When you are finished creating your assessment questions, click on the **Details** section below:

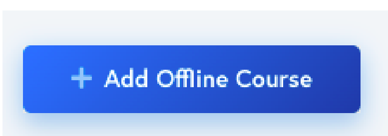
- Add a brief description of your custom course.
- Select the library and category you want the custom course to be associated with.
- If the assessment is a quiz, you'll want to keep this option turned on so that each question has a right and wrong answer.
- If the assessment is more like a survey, you should turn off this option so that there won't be right or wrong answers to questions.
- The **Force Order** option requires users to take each section of the course in the table of content's order. Turning this option off will allow your users to take sections out of order.

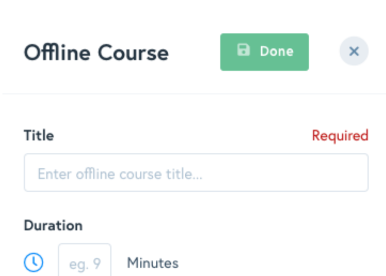
Scroll up and click on **Save** to save your custom course. After saving, you'll be able to preview the custom course and stream the sections. The custom course will appear in the list with the rest of your custom courses.

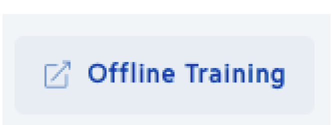
Offline Courses



The **Offline Courses** feature allows administrators to create shell courses, which can then be used to record & track training that occurred outside of your Vector LMS site. To locate Offline Courses, click on the Courses icon in your navigation menu. Then click on the Offline Courses tab above.







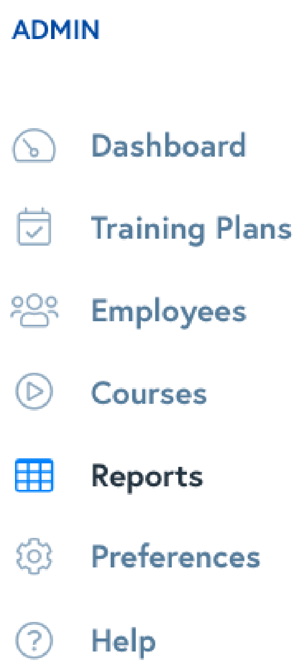
How To Create An Offline Course

1. Click on the **Add Offline Course** button to create your shell course.
   - Again, shell courses are simply the names of the training completed outside of your Vector LMS site.
2. Type in the name of the offline training along with the duration then click **Done**.
3. If you need to edit or delete the offline course you created, click on the three dots to the right of it.
4. Once you have created your offline course, the next step would be to record and track that offline course within your Vector LMS site.
   - To do so you'll need to click on the **Offline Training** session button.
   - To learn more about offline training sessions, refer to pages 10-12 of this user guide.

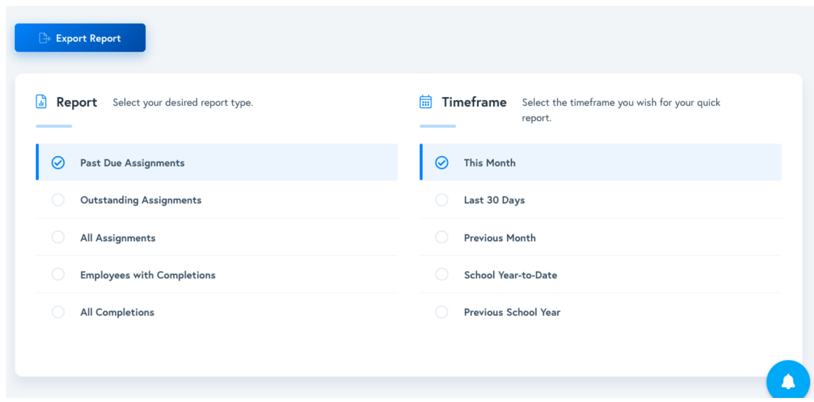
Reports

The **Reports** section allows administrators to run a variety of compliance reports that can then be exported into Excel. To locate Reports, click on the Reports icon in your navigation menu.

Let's briefly go over the different types of reports you have access to:



Quick Reports

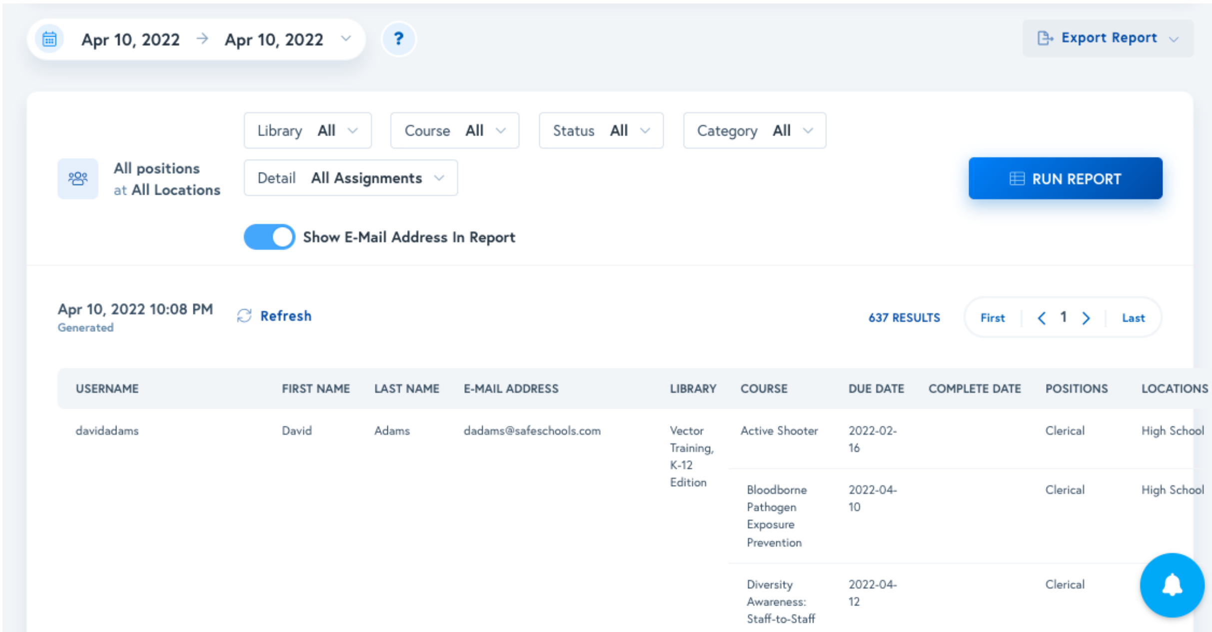


The **Quick Reports** section is where you can quickly generate a completion report by selecting the designated criteria and clicking the **Generate Quick Report** button.

For example, if you want to see all of the assignment completions from the last 30 days, select **All Assignments** and **Last 30 days**.

Then click **Export Report** to download the report into an excel format.

Compliance by Employee

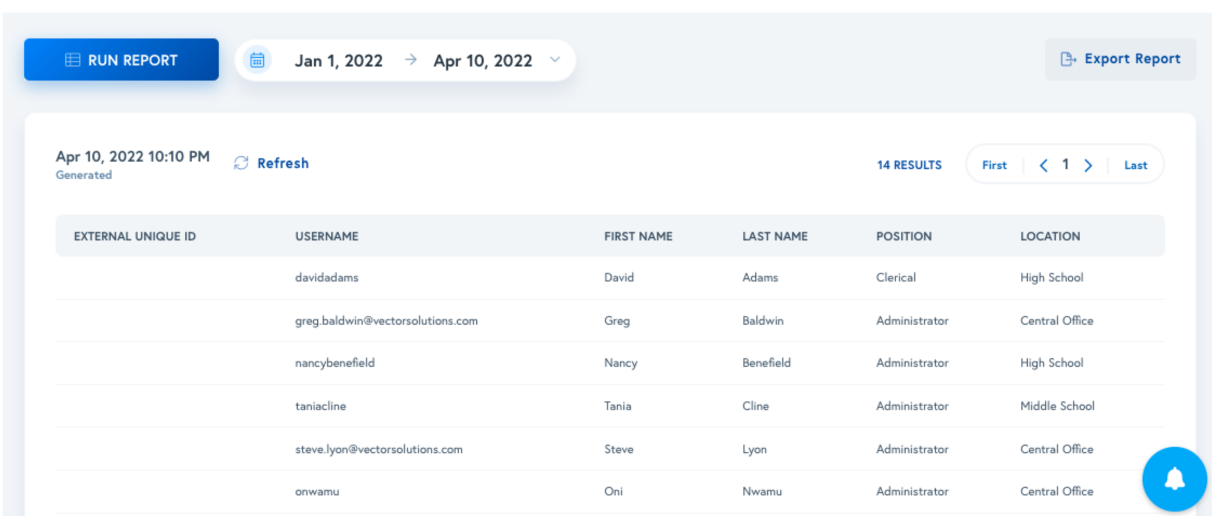


Compliance by Employee is one of our most frequently used reports. It allows administrators to use filters to generate specific compliance reports.

- Your report can include training assignments from a specific date range.
- You can filter the report by a course library, course, completion status, assignment category, and Detail Level.
- You can include all users in your report by leaving All Positions and All Locations as the selected group.
- You can select a targeted group of users by clicking on the Group icon.
- You can also include email addresses in your report.

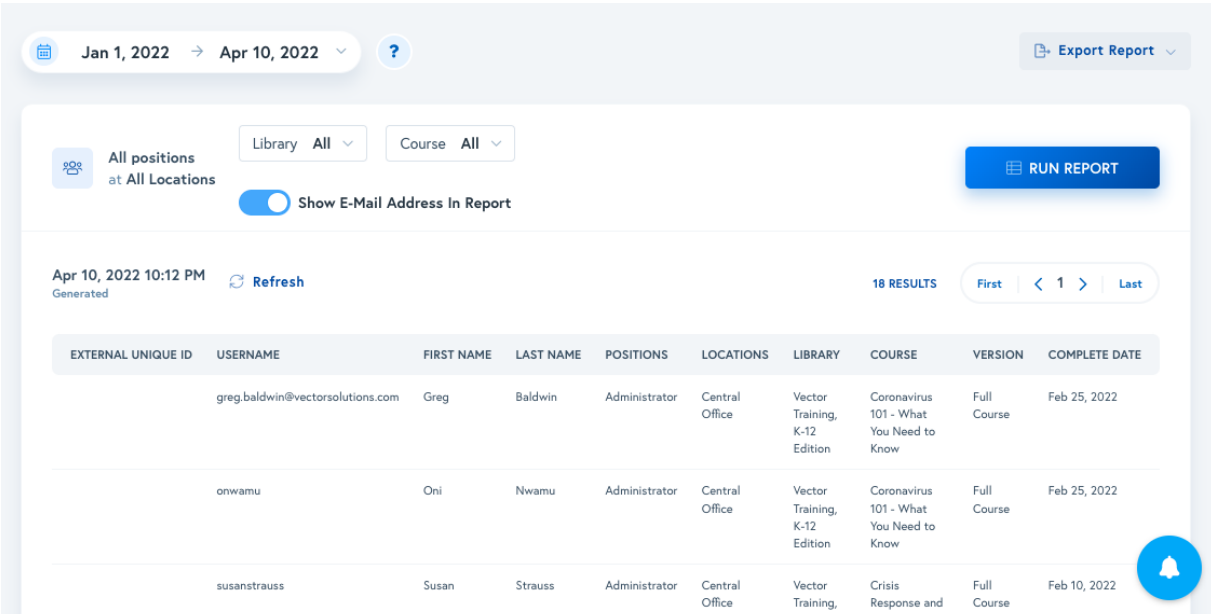
Once you have your filters set, click on the **Run Report** button to see the results. You'll be able to export the results to an Excel file.

Completions by Employee



The **Completions by Employee** report lists every user who has at least one completion in the training site. The ‘From Date’ and ‘To Date’ filters can be altered to expand the report. Click on the **Run Report** button to see the results.
You can export the report to an Excel file.

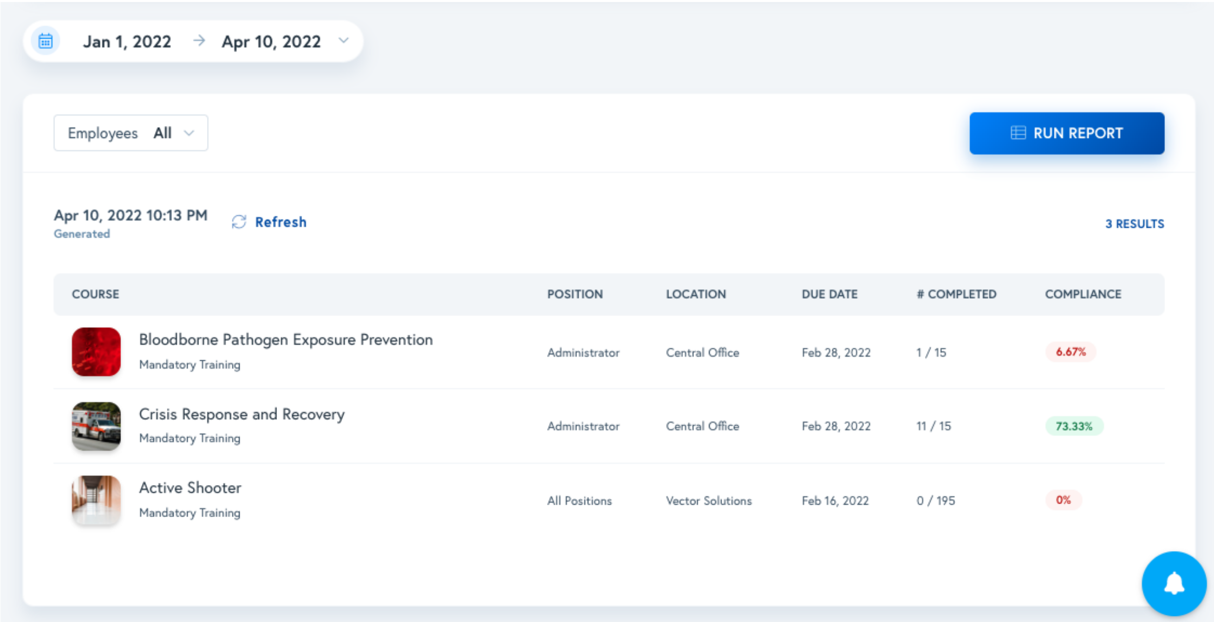
Completions by Employee



The **Completions by Time** report lists all completions, regardless of whether or not the assignment was mandatory.

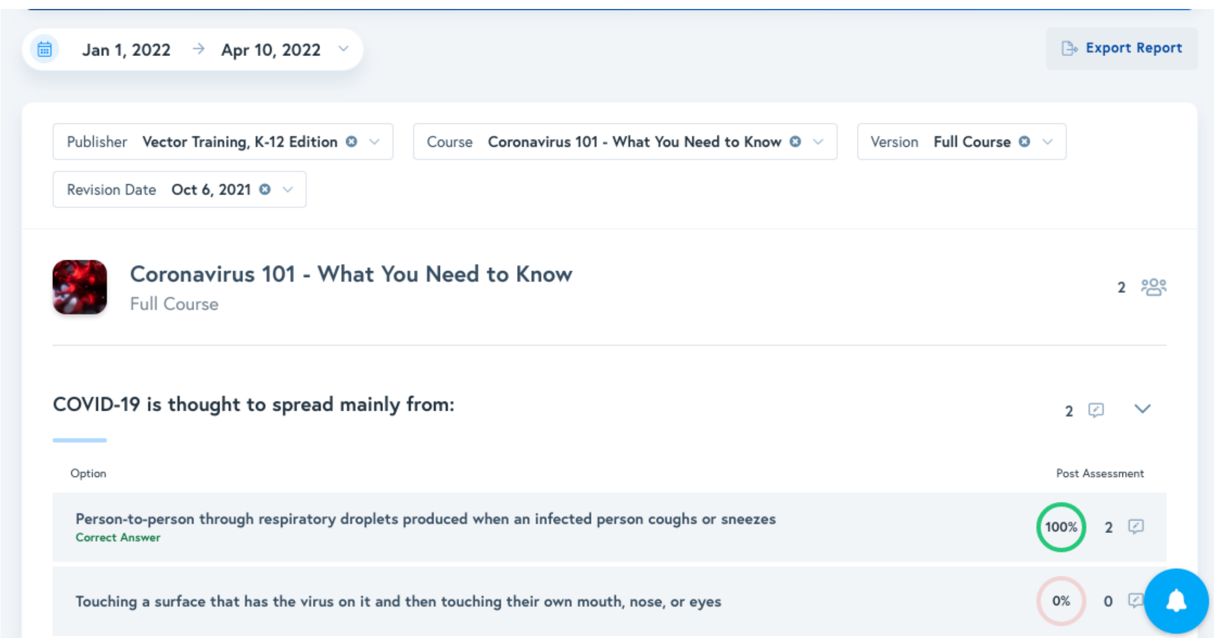
- You can filter the report by date, course library, and course.
- You can include all users in your report by leaving All Positions and All Locations as the selected group.
- You can select a targeted group of users by clicking on the Group icon.
- You can also add your users' email addresses to the report.
- Click on the **Run Report** button to see the results and export the report to an Excel file.

Training Compliance



The **Training Compliance** report allows administrators to view the completion percentage for all assigned training.
So if you generate this report, you'll be able to see the names of the assigned courses, the group associated with the training, the due dates, the ratio of users who've completed the training, and the completion percentage.

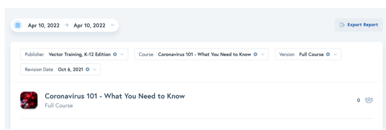
Assessments



The **Assessments** report is where you can select a specific course and see the percentage of users who selected each answer from the assessment's questions. The report will populate when you select your filters. You will:

- Select the course you want to see assessment details for.
- Select the course version and revision date.

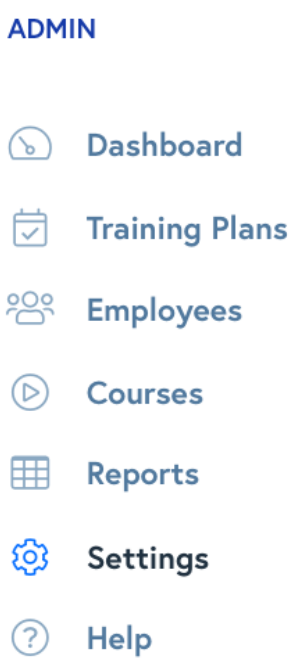
Once the report is populated, you can scroll down and see the percentage of users who selected each answer in the assessment.You can export this report to Excel by clicking on the **Export Report** button.



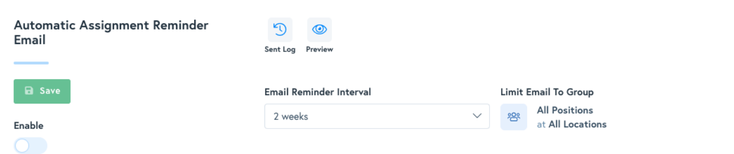
The **Assessment Improvement** report is run exactly like the Assessments report. The difference between this report is that it also includes data from the Pre Assessment that is taken before starting the course. Then it compares the pre-assessment answers to the post-assessment answers. This report can also be exported.

Settings

The **Settings** feature is where administrators can manage email, login, and training plan settings.
To locate Settings, click on the Settings icon in your navigation menu.

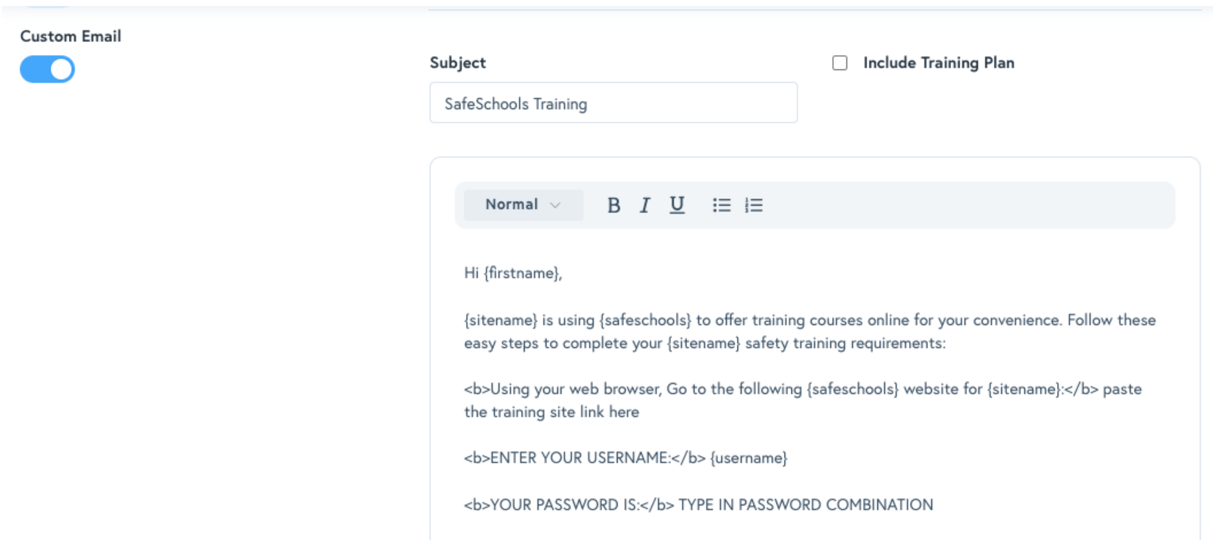


Emails



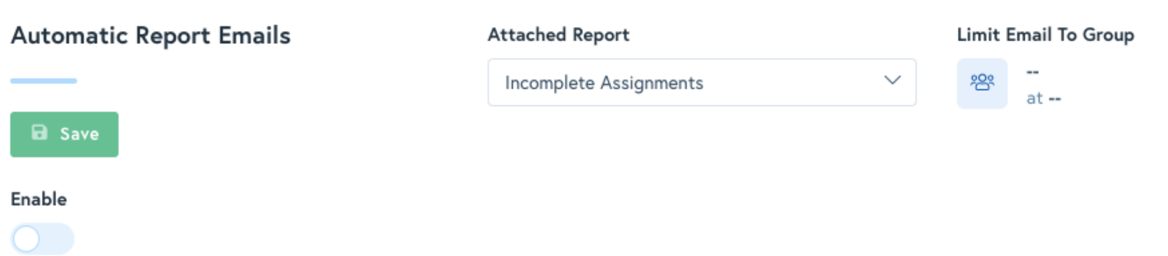
The first tab you'll land on in the Settings section is **Emails.** This is where you can activate the email reminders that will go out to users who have assigned training.

- Emails will be generated within 24 hours of activation. You should make sure your training plan is completely set up before you activate the email reminders.
- You can change the email reminder frequency by clicking on the **Email Reminder Interval** dropdown.
- And you can also have the email reminders go to a specific group of users by clicking on the group icon and selecting the position and location the users are associated with.
- If you want the email reminders to go out to all users who have assigned training, keep the group set at All Positions and All Locations.
- You can see previous emails that went out by clicking on the **Sent Log** button and viewing the details.
- You also have the ability to customize the email reminder template.



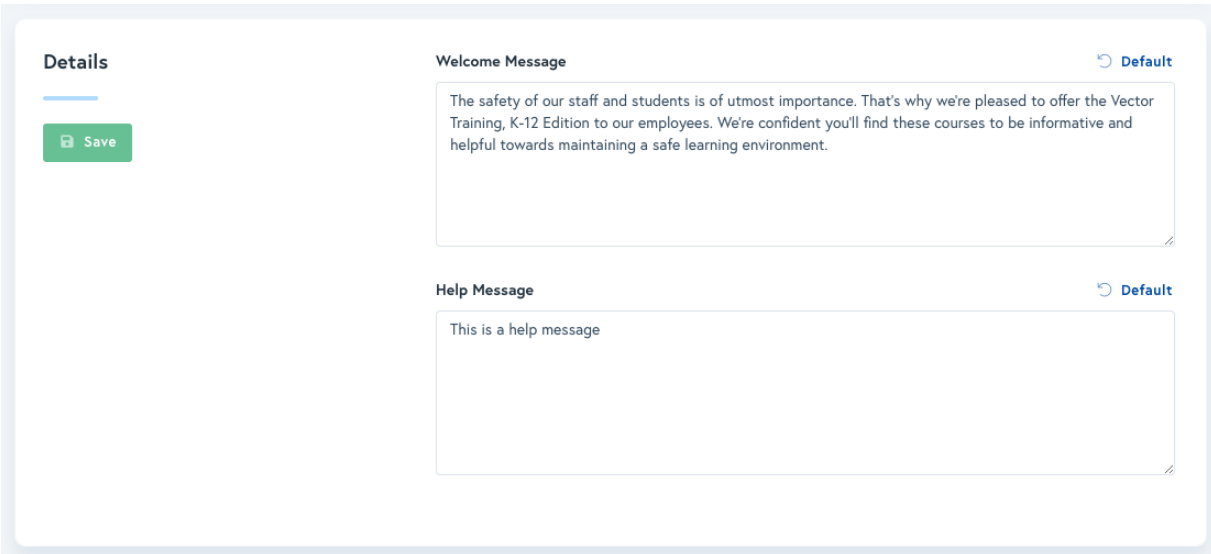
When you turn **Custom Email** on, you'll see the default email template appear.

- You can preview the email, rename the Subject line, and adjust or completely change the email body.
- If you want the names of the assigned courses to appear in the email reminders, turn on the Include Training Plan option.
- Hit **Save** when you're finished making changes then preview your custom email.



- If you want a report of all the incomplete assignments emailed to you on a monthly basis, turn on the **Report Email** option.
- If you want to see incomplete assignments from all users, click on the **Limit Email** option and select All Positions and All Locations. Or you can select a specific group of users.
- These monthly emails will go out to full administrators and report only administrators. Hit **Save** when you are finished making changes.

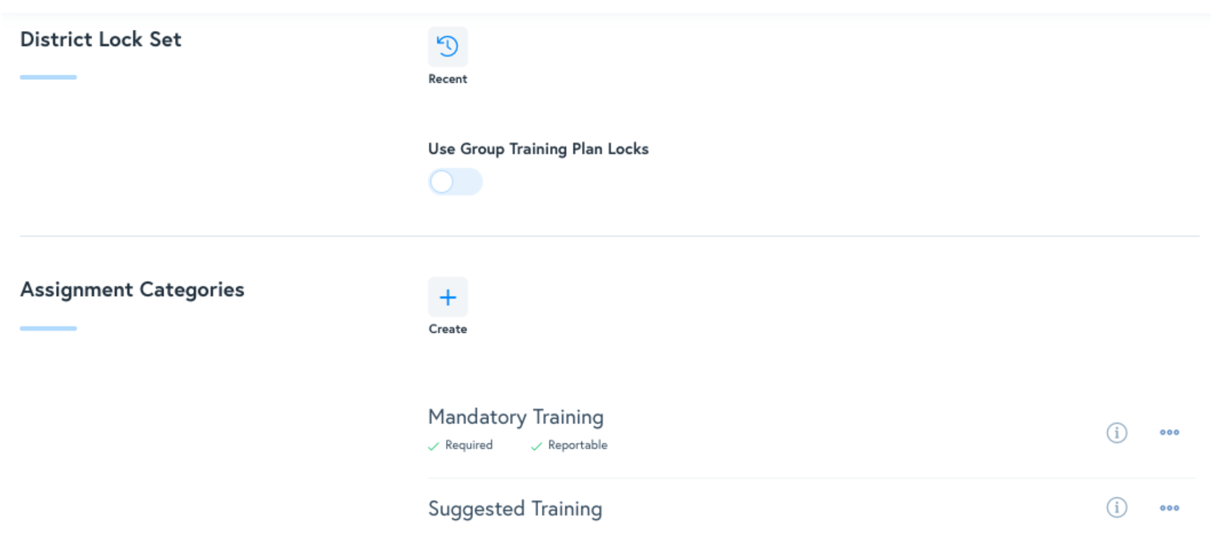
Login Page



The **Login Page** tab allows you to adjust the default Welcome Message that is displayed on your Vector LMS site's login page.

- This tab also gives you the option to add a custom help message.
- Your custom message will appear on the left side of your login page.
- The help message will display when you hover over the question mark icon.

Training Plan

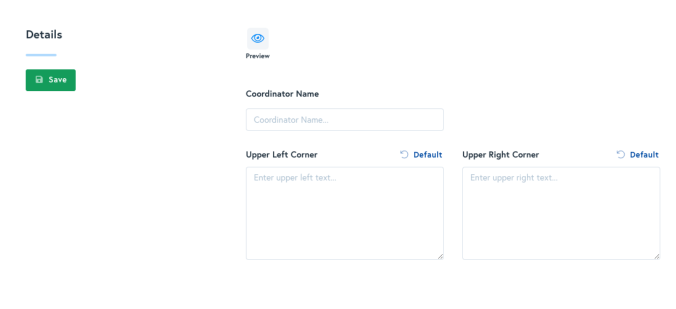


The **Training Plan** tab is where you can lock your training plan and create custom training categories.

- Locking your training plan prevents other admins from making changes without leaving their name and a reason why.
  - You can also view the recent lock history by clicking on the **Recent** button.
- Assigned training is grouped under **Categories**. The default categories are mandatory training and suggested training.

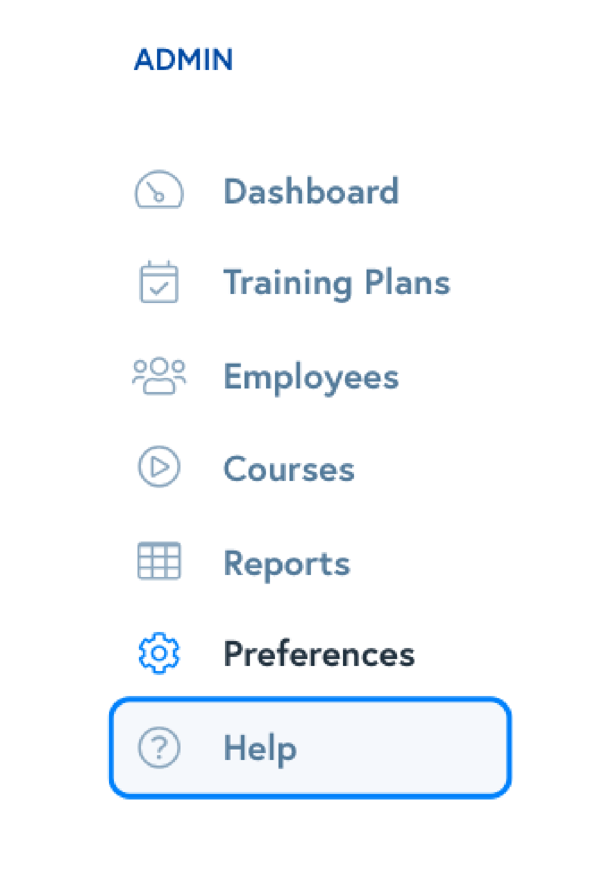
- You can edit the category names by clicking on the three dots to the right.
- You can click **Create** to add additional categories.
- When you create a new category, you'll add a name and description.
- You'll also select if you want the category to be considered required training, and if you want the courses associated with that category to appear in reports.

Certificate

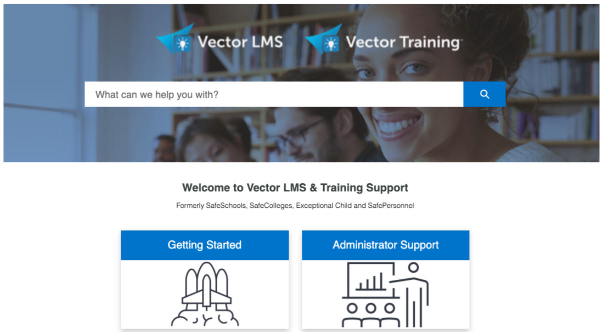


The **Certificate** tab is where you can add the main coordinator name to the certificate. You can also add details to the upper left and right corner of the certificate. After making your changes, hit **Save** and preview your certificate.

Help Resources

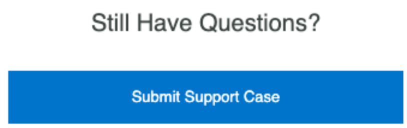


To access our **Support Center**, click on the **Help** icon in your navigation menu. Our support center includes articles, user guides, and tutorial videos that will help you navigate and manage your Vector LMS site. You can use the search bar above to look for specific resources in the support center or you can click on one of our main categories and browse through the resources that are associated with it.



If you are unable to find the answers you are looking for in our support center or need additional assistance, contact our support team using the options below. We're available from **8:00am - 6:00pm Eastern Time, Monday-Friday.**

1. Submit a support case by scrolling down to the bottom of your support center page, and clicking on the **Submit Support Case** button.



2. Live Chat with a support rep during business hours by clicking on the **Chat with an Expert** image on your support page.
3. **Call us** at 1-800-434-0154 Ext. 3

We look forward to serving you!