# Administrator Guide

Welcome to the Prepress Training Solution! This Administrator Guide will take you through the basic functions available to you in the Learning Management System.

The first section of this guide will walk you through Setting Up Your Account. It covers creating organization hierarchies, creating administrators and user accounts, creating groups, editing user accounts, changing passwords, and deactivating users.

The second section of this guide will cover Account Maintenance. It covers using the Learning Management System to: specify tests as mandatory or optional, edit test due dates, view usage reports, and send reminder e-mails.

## Setting Up Your Account

There are five main links available to you under the Admin tab. When first setting up your account, you will want to utilize the tabs in the order below.

- Find Organization
- Find Group –or - Find Training Path
- Find User
- Find Prehire

### Find Organization

If you have multiple regions, facilities, departments and/or shifts, the first thing you will want to do when you begin using your Prepress Training Solution account is create your organizational hierarchy. Under the Find Organization tab, you can create different regions, facilities, departments and/or shifts.

**Create Your Organizational Hierarchy**

PLEASE NOTE: If you intend to create multiple regions, facilities and shifts, please contact your Prepress Training Solution representative for assistance.

1. To begin, click Find Organization.
2. Click Display Hierarchy. Your company name will appear here.
3. Click the link to your organization's name.
4. To create a region, facility, department and/or shift, under Child Organization, click New.
5. Enter the name of the region, facility, department and/or shift. (i.e. Western Region).
6. Click Save. The new area should appear as a link under the name of your company.
7. If you wish to create an additional region, facility, department and/or shift, again, click View Hierarchy.
8. Click the link to the organization child (i.e. Western Region).
9. Under Child Organizations, click New.
10. Enter the name of the region, facility, department and/or shift. (i.e. Los Angeles).
11. Click Save. The new area should appear as a link under View Hierarchy.
12. Repeat as necessary.

**Create a New Administrator**

1. Click the Find Organization link.
2. Click Display Hierarchy.
3. Click the link to the region/facility designation over which the administrator will preside.
4. Click Add Contact.
5. Complete the Contact Information for the new administrator. For the username, it is suggested you utilize the person's e-mail address if available.
6. Enable the Learning Administrator checkbox.
7. Click Save. An e-mail will be automatically sent with the log-in information to the new administrator.

**Assigning Courses to New Administrators**

1. After creating any new user account, you will be on the Contact View page. Scroll down to the Courses header and click Add.
2. Click the appropriate courses by enabling the checkbox.
3. Scroll to the bottom of the list, and click Add.
4. An e-mail has been sent to this user with course assignments and log-in information.

**Find Group**

The Prepress Training Solution's Learning Management System will allow you to create groups. This feature allows you to create customized course curriculums based on job title or group membership.

**Create a New Group**

1. Click Find Group.
2. Click New.
3. Enter the Group Name (i.e. Mac Operator).
4. Click Save. You will now be on the Group View page.
5. To create a curriculum for your new Group, scroll down to the Courses header and click Add.
6. For each course you wish to add, enable the checkbox on the left side under the "Add to Group" column.
7. After the desired courses are selected, scroll to the bottom and click Add.
8. You will notice that the chosen courses now appear under the Courses header. If you wish to remove a course from a group, click the "remove" link next to the appropriate course title.

**Find Training Path**

Like the Groups feature, a Training Path allows you to create customized course curriculums for your users – BUT – it also allows you to choose the order in which each course is assigned and completed. Once constructed, the Training Path feature assigns each of the selected courses one at a time. The next course in the Training Path is only assigned after the prior course has been completed.

**Create a Training Path**

1. Click Find Training Path.
2. Click New.
3. Enter the Training Path Name (i.e. Mac Operator).
4. Click Save.
5. To create a curriculum for your Training Path, scroll down to the Courses header and click Add.
6. For each course you wish to add, enable the checkbox on the left side under "Add to Training Path" column.
7. After the desired courses are selected, scroll to the bottom and click Add.
8. You will notice that the chosen courses now appear under the Courses header. You may place these courses in the desired order by clicking on the "Up" or "Down" links located in the "Action" column next to each course.
9. You may remove a course from a Training Path by clicking on the "Remove" link located in the "Action" column next to each course.

## Find User

The first screen available when logging into your administrator account is the Find User screen. Here you can search for an existing user, add courses to an existing user or create a new user.

### Create a New User

1. Click the Find User link
2. Click New.
3. Enter the person's contact information. For the username, we suggest using the person's e-mail address if available.
4. If the person is an administrator, enable the Learning Administrator checkbox.
5. Click Save. The user account has now been created, and an e-mail has been sent to the user with their log-in information.

### Assigning Users to a Group

1. On the Contact View screen, scroll down to the Groups header and click Add.
2. Select the appropriate group by enabling the corresponding checkbox in the "Add Group" column.
3. You may select a date for pre tests to be completed from the date box located below the list of available groups.
4. Click Add. This will return you to the Contact View screen. The selected group will appear under the Groups header and the courses will appear under the Courses header.
5. If you wish to remove a user from a group, click the Remove link next to the appropriate group.

### Assigning Users to a Training Path

1. On the Contact View screen, scroll down to the Training Path header and click Add.
2. Choose the appropriate Training Path by enabling the corresponding checkbox in the "Assign Curriculum" column.
3. Scroll to the bottom of the list and click Add. This will return you to the Contact View screen. The selected Training Path will appear under the Training Path header and the appropriate course will appear under the Courses header.
4. If you wish to remove a user from a Training Path, click the Remove link next to the appropriate Training Path.

### Assigning Courses to a User

1. On the Contact View screen, scroll down to the Courses header and click Add.
2. Choose the appropriate courses by enabling each corresponding checkbox in the "Assign to User" column.
3. Scroll to the bottom of the list and click Add. This will return you to the Contact View screen. The selected courses will appear under the Courses header.
4. An e-mail is sent to the user with course assignments and login information.

### Find an Existing User

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link to the desired user's name or choose View.

**Edit Existing User Information**

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link for the desired user's name or click View.
4. On the desired user's Contact View screen, click the Edit button.
5. Make any required changes.
6. Click Save.

**Change an Existing User Password**

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link for the desired user's name or click View.
4. On the desired user's Contact View screen, click Change Password.
5. Enter the new password, and confirm in the second box.
6. Click Save.

**Deactivate a User**

PLEASE NOTE: Deactivating a user is not reversible.

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link for the desired user's name or click View.
4. Click Deactivate. The user will be automatically deactivated.

**Change an Existing User's Organization**

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account. Click on the desired user's name.
3. On the desired user's Contact View screen, click the Edit button
4. Click the Magnifying Glass icon next to the current Organization and click the new Organization from the pop up dialog box.
5. Click Save.

**Change an Existing User's Administrator**

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account. Click on the desired user's name.
3. On the desired user's Contact View screen, click the Edit button.
4. Click the Magnifying Glass icon next to current Administrator and click the new Administrator from the pop up dialog box.
   PLEASE NOTE: If the Administrator you want to assign does not appear in the list, the Administrator is not in the same Organization as the user you have selected. In this case, you must first move this user to the Organization in which the desired Administrator is located. See "Change an Existing User's Organization" above.
5. Click Save.

## Find Prehire

With this feature you can create Prehire User Accounts and assign these users the same tests that are found in the Prepress Training Solution curriculum without having them enrolled in the full training program. Each test assigned is taken only once and the results are stored for the administrator's review.

### Create a New Prehire User

1. Click the Find Prehire link
2. Click New.
3. Enter the Prehire candidate's name and contact information.
   PLEASE NOTE: At the time a test is assigned to this Prehire user, the e-mail notification containing login information and specific test assignment will be sent to the e-mail address that is entered in this section. This notification e-mail will also be sent to the primary administrator.

   USAGE TIP: Some clients prefer to proctor this test at their location and do not want to automatically provide test information to the candidate. If you do not want this user to receive the notification e-mail, enter your e-mail address in the Prehire user contact information section.

4. Click Save - the Prehire user account has now been created

### Assign Tests to Prehire User

1. Click the Find Prehire link
2. Click Search.
3. From the list of names, select the Prehire user you would like to assign tests.
4. On the Prehire View page select the Add button from the Tests area.
5. Choose the appropriate test by enabling the corresponding checkbox.
6. Scroll to the bottom of the list and click Add.
7. The assigned test or tests will become active, and a notification e-mail is sent.
   PLEASE NOTE: At the time a test is assigned, the e-mail notification containing login information and the specific test assignment will be sent to the e-mail address that is entered in this Prehire user's contact information section. This e-mail will also be sent to the administrator.

   USAGE TIP: Some clients prefer to proctor this test at their location and do not want to automatically provide test information to the candidate. If you do not want this user to receive the notification e-mail, enter your e-mail address in the Prehire user contact information section.

### Review Prehire Test Results

1. Click the Find Prehire link
2. Click Search.
3. From the list of names, click the link for the name of the Prehire user you would like review.
4. On the Prehire View page, Date Taken and Percent Correct will be displayed next to each completed test.
5. To see greater detail, click the View link next to the appropriate test.

## Account Maintenance

The Prepress Training Solution Learning Management System is designed to ensure your employees are completing courses on time and with the test scores you want them to achieve.

The Learning Management System allows you to:

1. Specify Tests as Mandatory or Optional
2. Edit Test Due Dates
3. View Usage Reports
4. View Title Ranking Reports
5. View Title Survey Reports
6. Send Reminder E-mails

### Specify Tests as Mandatory or Optional

You may not want a user to take a pre-test so that he or she will be assigned all the training modules for a particular course. First, the course must be assigned to the user. To set a test as optional:

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link to the desired user's name or click View.
4. Scroll down to the Courses header and click View next to the desired course.
5. Scroll down to Pre-test and click Edit.
6. In the Mandatory drop-down menu, choose Yes or No.
7. Click Save.

### Edit Test Due Dates

The Prepress Training Solution Learning Management System sets the default due date for a test one week from the date it is assigned. If the user does not complete the test by the due date, they will not be locked out of the system and will still be able to access a past-due test.

If you wish to change the due date of a test:

1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link to the desired user's name or click View.
4. Scroll down to the Courses header and click View next to the desired course.
5. Scroll down to Pre-test or Post-Test and click Edit.
6. Next to "Complete By", click the Calendar icon.
7. Change the due date.
8. Click Save.

**View Usage Reports**
To view employee usage and test scores in one location, the Prepress Training Solution Learning Management System offers PDF usage reports.

1. To begin, click Find Organization.
2. Click Display Hierarchy. Your company name will appear here.
3. Click the link to your organization's name.
4. Click Organization Usage Report. PLEASE BE PATIENT! The system may take several minutes to prepare the report depending on your company's size.
5. You may Save or Print this PDF Report for your records, or use it to send reminder e-mails.

**View Title Ranking Reports**
To view employee ranking by test scores for a specific course, the Prepress Training Solution Learning Management System offers PDF title ranking reports.

1. To begin, click Find Organization.
2. Click Display Hierarchy. Your company name will appear here.
3. Click the link to your organization's name.
4. Click Organization Title Ranking Report.
5. Select the desired course and scroll to the bottom of page. Click Generate Title Ranking Report. PLEASE BE PATIENT! The system may take several minutes to prepare the report depending on your company's size.
6. You may Save or Print this PDF Report for your records.

**View Title Survey Reports**
To view the results of your user's Post Course Evaluation Surveys, the Prepress Training Solution Learning Management System offers PDF Title Survey Reports.

1. To begin, click Find Organization.
2. Click Display Hierarchy. Your company name will appear here.
3. Click the link to your organization's name.
4. Click Organization Title Survey Report.
5. Select the desired course and scroll to the bottom of page. Click Generate Title Survey Report. PLEASE BE PATIENT! The system may take several minutes to prepare the report depending on your company's size.
6. You may Save or Print this PDF Report for your records.

**Send Reminder E-mails**
1. Click the Find User link.
2. Type in the person's first or last name –or- click View Contacts to bring up the full list of users in your account.
3. Click on the link to the desired user's name or click View.
4. Scroll down to the Courses header and click View next to the desired course.
5. Scroll down to Pre-test or Post-test and click the Remind link. A dialog box will confirm the e-mail has been sent.
6. Click OK to close the dialog box.

**E-mail Notification Policy**

Use of the Prepress Training Solution grants permission to be sent e-mail regarding training activity, Learning Management System updates, and other important information.

1. Please DO NOT report these messages to Blacklists as SPAM. Doing so may negatively impact other Prepress Training Solution clients not in your organization and also may result in the suspension of all important system e-mails for your entire organization.
2. If you do not wish to receive these e-mails please contact your Corporate Training Administrator. Corporate Training Administrators or Individual Account users, please contact your Prepress Training Solution Representative for assistance.