

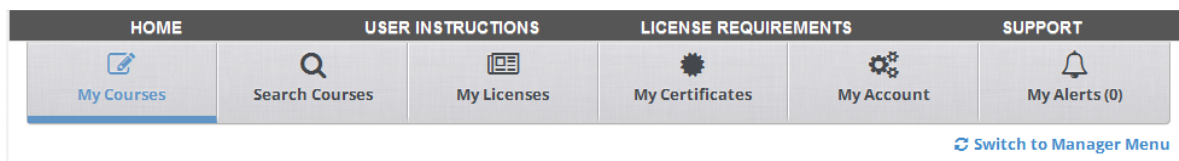


MANAGER'S USER GUIDE

Table of Contents

WELCOME TAB	4
My Courses	4
Search Courses	6
My Licenses	7
My Certificates	8
My Profile	10
My Alerts	12
MANAGER VIEW TAB	12
Manage Users.....	13
Manage Training.....	20
Reports	28
Settings	28
Manage Library.....	33

WELCOME TAB



- **My Courses:** Displays courses the user has *self-enrolled* in as well as courses that have been *assigned* to the user when available.
- **Search Courses:** Displays all of the courses in the specific organizations' catalog.
- **My Certificates:** Displays all Certificates of Completion that are available to be printed or emailed as well as all transcript records.
- **My Account:** Displays the users' profile information.
- **My Alerts:** Displays any *alerts* that the user has elected to receive.



My Courses















My Courses

[Courses](#)
[History](#)
[Instructions](#)

ASSIGNED COURSES

	Course Title	Hours	Expires (EST)	Time Spent	Score	Status	Action
	Project Management Basics Click to access course	4	02/28/2017	44 min	73.81%	Partial 	Print Cert
Total Hours:		4					

SELF-ENROLLED COURSES

	Course Title	Hours	Expires (ET)	Time Spent	Score	Status	Action
	LEED Green Associate Qualification Certificate: Green Building Principles	10	02/23/2017	0 min	0.00%	Not Started	Start Course 
	Idaho Electrician 4 hour Industry Related Program #2	4	02/23/2017	0 min	0.00%	Not Started	Start Course 
	FL Statutes, Chapter 489, Sections 101 - 114: Construction Contracting [V.02]	1	02/23/2017	0 min	0.00%	Not Started	Start Course 
	Understanding Workers' Compensation for Employees (V14)	1	02/23/2017	0 min	0.00%	Incomplete	Continue 
	Florida Wind Mitigation Retrofit Requirements for Existing Buildings [V2]	1	02/23/2017	6 min	20.00%	Not Passed	See Results 
	Excavation Safety and Shoring/OSHA	4	02/23/2017	0 min	0.00%	Not Started	Start Course 

The *My Courses* page is the first page displayed for all users upon successful log in.

- **Assigned Courses:** Users will only see Assigned Courses when available. This section lists the courses that have been assigned to the user. The user must *accept* an assignment before they can begin.
 1. To *accept* an assignment the user can click on either the *accept* button or the course title.
- **Self-Enrolled Courses:** This section lists the courses that the user has enrolled themselves in.
- To begin a course, click on the *Start Course* button or click on the Course Title.

Navigating a course

Component (* Required)	Print	Score	Status	Action
Pre Test You need to complete this exam in one sitting		0.00%	Not Started	Begin
Lesson	Print		Not Started	Begin
Exam * You need to complete this exam in one sitting Max. attempts: 2		0.00%	Not Started	Begin
Survey			Not Started	Begin

Additional Information	
Item #	RVI-10863
Title	Applied Vibration Analysis: Analyzing Gear Vibrations
Provider	RedVector
Order #	160315-1004
Hours	0.50
Rating	★★★★★ (1 Reviews)
Features	

- Most *courses* are made up of four components: Pre Test, Lesson, Exam and Survey.
- Click on the *Begin* button to begin the Pre Test.
 1. Answer the questions by selecting the correct answer(s) then click on the arrow pointing to the right to be taken to the next question. To go back to a previous question, click on the arrow pointing to the left. You can also go back to questions by selecting the question number below the Previous/Next page arrows.
 2. When all the questions have been answered, click on the *Grade Exam* button
 3. The user is able to *Save & Exit* the Pre Test, they will be able to save their progress in the case they are not able to complete the Pre Test in one sitting. When they are ready to complete the Pre Test, simply click on the *Continue* button.
 4. If your account has the 'View Exam History' setting turned on, once a Pre Test or Exam has been completed a link will be displayed under the component name. Click on the *View Exam History* link to see which questions were answered correctly and incorrectly.
- Click on the *Begin* button to begin the Lesson.

1. Click on the printer icon to display and/or print the accompanying written materials. (Not all lessons have accompanying written materials)
 2. You must view every page of the lesson in order for it to be marked complete and be able to proceed to the exam.
 3. After the lesson has been completed once, you can go back through the lesson by clicking on the *review* button.
- Click on the *Begin* button to begin the Exam – Note: some exams have randomized questions and/or a set maximum attempt setting, student will have to contact internal administrator or Account Manager for assistance if failed.
 1. Answer the questions by selecting the correct answer(s) then click on the arrow pointing to the right to be taken to the next question. To go back to the previous question, click on the arrow pointing to the left. You can also go back to questions by selecting the question number below the Previous/Next page arrows.
 2. When you have answered all of the questions, click on the *Grade Exam* button
 3. The user is able to *Save & Exit* the Exam, the user will be able to *Save & Exit* to save their progress in the case they are not able to complete the Exam in one sitting. When they are ready to complete the Exam, simply click on the *Continue* button.
 4. If your account has the 'View Exam History' setting turned on, once a Pre Test or Exam has been completed a link will be displayed under the component name. Click on the *View Exam History* link to see which questions were answered correctly and incorrectly.
 - Click on the *Begin* button to begin the survey

Search Courses

Course Search

Your search returned **730 Results!** [Export Link](#)

Keyword/Item #

My Licenses

- ☐ AK - Architect
- ☒ AK - Engineer
- ☒ CA - Engineer
- ☐ FL - Certified Contractor

State Licenses [?](#)

e.g., FL - Architect

- ☐ AK - Architect
- ☐ AK - Building Inspector
- ☐ AK - Electrical Administrator
- ☐ AK - Engineer
- ☐ AK - Gen Contractor w/Res. Endorsement
- ☐ AK - Interior Designer
- ☐ AK - Land Surveyor

Professional Organizations [?](#)

e.g., Organization Name

- ☐ American Academy of Environmental Engineers - AAEEs - Member
- ☐ American Council for Accredited Certification - ACAC - Member
- ☐ American Fire Sprinkler Association - AFSA - Fire Sprinkler Industry

Your Selections [Clear All](#) **Sort By** [Newest](#)

License: [AK - Engineer](#) License: [CA - Engineer](#)

Webinars (4) [See All](#)

NEW	Mon, June 20 5pm-7pm ET	Design of Buildings for Coastal Flooding REPEAT, Tuesday, June 20, 2016, 1pm-3pm Eastern - RV-W102015	Advanced 2 hrs.	Enroll

Packages (7) [See All](#)

	15 Hour Residential & Commercial Green Building Package - RV-PKG582	Intermediate 15 hrs.	Enroll

Courses (719) [See All](#)

NEW	Hazardous Waste: Treatment - RV-10857	Intermediate 1 hr.	Enroll
	Designing and Specifying Pervious Concrete - RV-10873AW	Intermediate 2 hrs.	Enroll
	Combustion Analysis - RV-10837	Intermediate 1 hr.	Enroll
	Compressible Flow Components Analysis - RV-10838	Intermediate 1 hr.	Enroll
	Phasors and AC Circuit Analysis - RV-10871AW	Fundamental 2 hrs.	Enroll

Course Search page

The *Search Courses* page displays all of the courses that are available in your organizations' catalog. You can search for a course by a Keyword or Item #; narrow the search by selecting a Category, Product Type, Level, or Language from the drop down menus. You can search for courses that apply to your selected filters.

- Enroll in a course by clicking on the *enroll* button in the right most column.
- Click on the course title with your mouse to see full description of the course.
- Click on the *Export to Excel* link to export your entire library into an excel worksheet.

Date	Time	Location	Item #	Session Title	Avail. Seats	Instructor	Action
4/1/2016	04:00 PM EST	Tampa	RV-IL-2515	March Hires Course: Instructor-led: New Hire Orientation Training	18	Givany	Register

If the Instructor Led Training (ILT) option is enabled – Instructor-led Training page

- All current Instructor-led Training sessions will automatically be displayed, or you can search for an Instructor-led Training session by the ILT course information (title or item #), the classroom location information (State and/or city) or by the session detail information (type or date).
- Click on the *register* button in the far right column to register for the specific session. Once registered, the button will change to say *withdraw*. Click on the *withdraw* button to withdraw your registration from the specific session.
- Click on the *session title* link to see the details of the specific session.

My Licenses

License Name	License Number	Expires	Reminder	Requirements
AK - Architect	test	5/31/2016	3/10/2016	View
AK - Engineer	test	3/31/2016	3/30/2016	View
CA - Engineer	test	5/31/2016	3/9/2016	View
FL - Certified Contractor	abc	7/30/2016		View

Adding a New License

- Begin by selecting the Add License button
- Select the Profession
- Select the State
- Click on the *Add* button

After clicking the *Add* button it will generate the specific license information for your selected licenses and provide the License Requirements.

- Include license number and expiration date for each license. You also have the option to include a Custom Reminder Date to receive a License Expiration Reminder if selected from the Reminder Settings under the My Profile button.

My Certificates

My Certificates

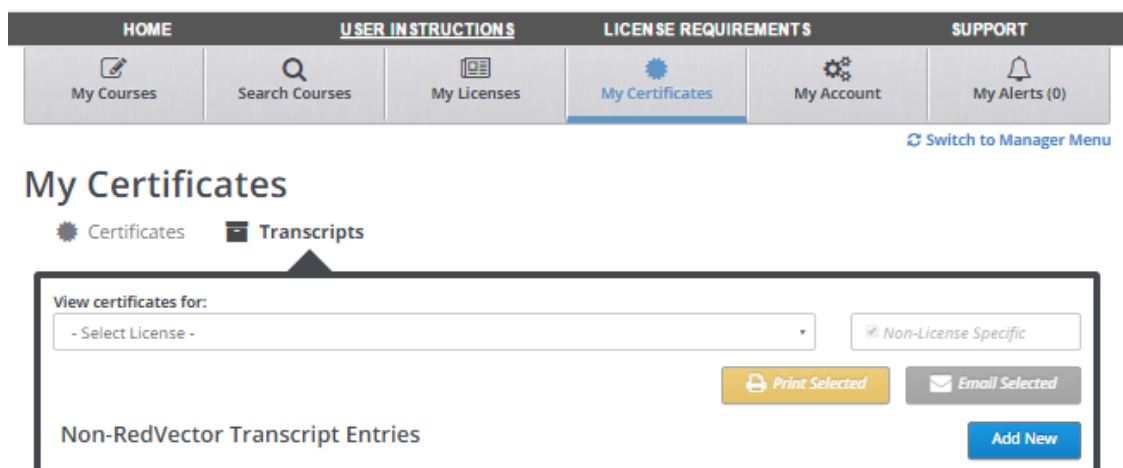
Certificates **Transcripts**

View certificates for: FL - Engineer ☐ Non-License Specific

Narrow results by: Renewal Period

[Review License Requirements](#)

<input checked="" type="checkbox"/>	Course	Time (min.)	Hours	Completed	Score	Status
<input checked="" type="checkbox"/>	2008 NEC Changes Part 6 Special Equipment	4	2.00	11/22/2013	91.67	✓ Print Cert.
	Score Requirement: Satisfied					
	Meets Topic Requirement(s): Technical					
		4	2.00			



The My Certificates section is where all available certificates of completion can be viewed as well as all transcript records.







My Certificates page

- Begin by selecting your specific License or Non-License Specific option, then:
 1. By Renewal Period: select a renewal period from the drop down menu then click on the *view* button.
 2. By Year: select a year from the drop down menu then click on the *view* button.
 3. By Custom Date Range: enter the start and end dates then click on the *view* button.
- To print a single certificate or multiple certificates:
 1. Select the checkbox(es) that correspond to the certificate(s) to be printed then click on the *Print Certificate(s)* button.
 2. The certificate(s) will be displayed in a new window and can then be printed or saved as a PDF document.
- To email a single certificate or multiple certificates:
 1. Select the checkbox(es) that correspond to the certificate(s) to be emailed then click on the *Email Certificate(s)* button.
 2. In the pop-up, enter any additional email addresses that you would like to email the certificate to then click on the *Send Certificate(s)* button.

My Transcripts page

- Begin by selecting your specific License or Non-License Specific option, then:
 1. By Renewal Period: select a renewal period from the drop down menu then click on the *view* button.
 2. By Year: select a year from the drop down menu then click on the *view* button.
 3. By Custom Date Range: enter the start and end dates then click on the *view* button.
- The *My Transcripts* page displays completed courses as well as any courses the user is enrolled in.
- Certificates of Completion can be also printed and/or emailed from the *My Transcripts* page.

My Profile

HOME	USER INSTRUCTIONS	LICENSE REQUIREMENTS	SUPPORT
 My Courses	 Search Courses	 My Licenses	 My Certificates
			 My Account
			 My Alerts (0)

[Switch to Manager Menu](#)

My Account

 Personal Information  Reminder Settings  Order History  Instructions

Personal & Company Information	Account Settings
<p>First Name:</p> <input type="text" value="Manager First"/>	<p>Username:</p> <input type="text" value="ManagerView"/>
<p>Middle Name:</p> <input type="text"/>	<p>NOTE: Username & Password must be at least 5 characters</p>
<p>Last Name:</p> <input type="text" value="View Last"/>	<p>Password:</p> <input type="password" value=""/>
	<p>Confirm Password:</p> <input type="password" value=""/>

In the *My Profile* section you can view and update a users' personal information and set any reminders.

Personal Information page

- The only fields that **cannot** be updated are the First Name, Middle Name and Last Name.
- The Address fields are populated with the address that is on file for the account.
- Once a change is made, click on the corresponding *save* button.
- Username requirements:
 1. A username can contain letters, numbers and the special characters !@#\$\$%&_.-.
 2. A username must be a minimum of 5 characters; a maximum of 50 and cannot contain any spaces.
- Password requirements:
 1. A password can contain letters, numbers and the special characters !@#\$\$%&_.-.
 2. A password must be a minimum of 5 characters; a maximum of 20 and cannot contain any spaces.

Reminder Settings page

HOME USER INSTRUCTIONS LICENSE REQUIREMENTS SUPPORT

My Courses Search Courses My Licenses My Certificates My Account My Alerts (0)

[Switch to Manager Menu](#)

My Account

Personal Information **Reminder Settings** Order History Instructions

Primary Email: givany.colon@redvector.com **Alternative Email:**

[Enter Verification Code](#) | [Resend Code](#)

Notifications available for opt-in:

Notification	Primary Email	Alternative Email	My Alerts
Course Expiration Reminder - 2 Weeks Prior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
License Expiration Reminder - 30 Days Prior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notifications set up by your administrator:

Notification	Primary Email
Course Assignment Notification	<input checked="" type="checkbox"/>

- There are two types of reminders that a user can elect to receive.
 1. Reminder notification by email: A user must verify their email address before they can begin receiving these notifications.
 2. Reminder alert: Only visible when a user is logged in and all alerts will be displayed on the My Alerts page.
- An individual user can elect to receive the Course Expiration Reminder and the License Expiration Reminder (**email notification, alert or both**)
- A Manager on the account sets the Course Assignment Notification for all users in the account. (**email notification only**)

My Alerts



- If a user has elected to receive reminder notifications via alert, the alerts will be displayed on this page.

MANAGER VIEW TAB



- Overview: This section contains a link to the Manager Instruction Manual as well as brief descriptions of the Manage Users, Manage Training, Reports, Settings and Manage Library sections.
- Manage Users: Navigate to this section to search for existing users. This is also where you can upload licenses and edit student information.
- Manage Training: Navigate to this section to search for previously created assignments or to create new assignments; to search for previously created Ad Hoc activities or to create new Ad Hoc activities; to search for previously created Competency Assessments or manage existing Competency Assessments.
- Reports: Navigate to this section to generate a One Click report or an On Demand report.
- Settings: Navigate to this section to view or update existing job roles, create new job roles or to delete existing job roles; to create new Auto Assignments or to view existing Auto Assignments; to set or change reminder notifications at the account/global level; to view users with assigned security roles or to assign security roles.
- Manage Library: Navigate to this section to view existing packages.

Manage Users

HOME USER INSTRUCTIONS LICENSE REQUIREMENTS SUPPORT

Overview Manage Users Manage Training Reports Settings Manage Library

[Switch to Student Menu](#)

★ Manage Users User Uploads Library Assignment

Search Users

Search Users

Account Account Search Clear

RV Demo Account

Username

First Name

Last Name

Email

Does this user hold professional licenses or certifications for CE tracking?

License

Profession

Library

Search

Manage Users page

- Navigate to this section to search for existing users, to assign course libraries, upload licenses, and edit student information.

Search Users tab

1. Click on the *search* button without entering any search criteria to display a list of all users in an account.
2. To narrow the search results displayed, enter search criteria in one or more of the following fields – Username, First Name, Last Name or Email address, and then click on the *search* button.
3. If an organization has more than one facility or location, narrow the search results displayed by selecting a facility from the drop down then click on the *search* button.
4. Click on the *select* link in the *options* column to view the users' profile.

Manage Users | User Uploads | Library Assignment

Search Users []

User Profile | User Enrollments | User Certificates

Login Information

Login ID/ Username * JohnSnow

Password * PassWord

Confirm Password * PassWord x

Account / Facility Information

Account/Facility RV Location 3

User Number/ HR ID 2535B

Company ABC YourWay

Hire Date 12/11/2015

Title Director of Sales

Job Role -select job role-

Does this user hold professional licenses or certifications for CE tracking? ☒ Yes ☐ No

Administrative Options

Single click a header below for options

Remove User from Account

Move User

Library Assignment

- **User Profile tab**

1. Any of the values on this tab can be changed. All fields marked with an asterisk (*) are required. After a change is made, click on the *save* button at the bottom of the page to save the changes.
2. Click on the *Remove User from Account* link to remove a user from an account. The user will be removed from the account, but not removed from the system – if records are needed at a later date they can be obtained if necessary by reaching out to your dedicated Account Manager.
3. Click on the *Move User* link to move the user to a different facility within the same organization (if the organization has multiple facilities).
4. Click on the *Library Assignment* link to view the library assignments for the user and to assign additional libraries.

- **Add New License for existing users**

1. Click on the *Add New License* button towards the bottom of the User's Profile page. Select license from the drop down list.
2. Add *License number*.
3. Add *License Expiration Date*.
4. Click the *Update* link and then click on the *Save* button to save new license information.

Manage Users | User Uploads | Library Assignment

Search Users []

User Profile | **User Enrollments** | User Certificates

User Information

Name: John Snow
Email: TheNorth@Remembers.com
Username: JohnSnow

Course Title	Enroll Date	Expire Date	Score	Status	Completion Date	Remove	View Exam History
Worksite Safety 03: OSHA Fall Protection Hours: 1.00	2/29/2016	2/28/2017	0.00%	%	-	✖	
ABCs of Goals Hours: 1.00	2/29/2016	2/28/2017	0.00%	%	-	✖	
Developing & Managing a Project Budget Hours: 4.00	2/29/2016	2/28/2017	0.00%	%	-	✖	

Course Assignments (Not Accepted)

Course Assignment #	Course Title	Expire Date	Remove
160223-1924	ABCs of Managing Time & Effort: The 80/20 Way	2/23/2017 11:59:59 PM	✖
160223-1924	Effective Communication	2/23/2017 11:59:59 PM	✖
160223-1924	Sexual Harassment: Respecting the Individual	2/23/2017 11:59:59 PM	✖

Ad Hoc Training Records

Catalog Item	Credit Hours	Completion Date	Completion Status	Course Document	Remove
General Safety Training Your Score: 100.00%	2.00	03/02/2015	✓		✖

- **User Enrollments tab**

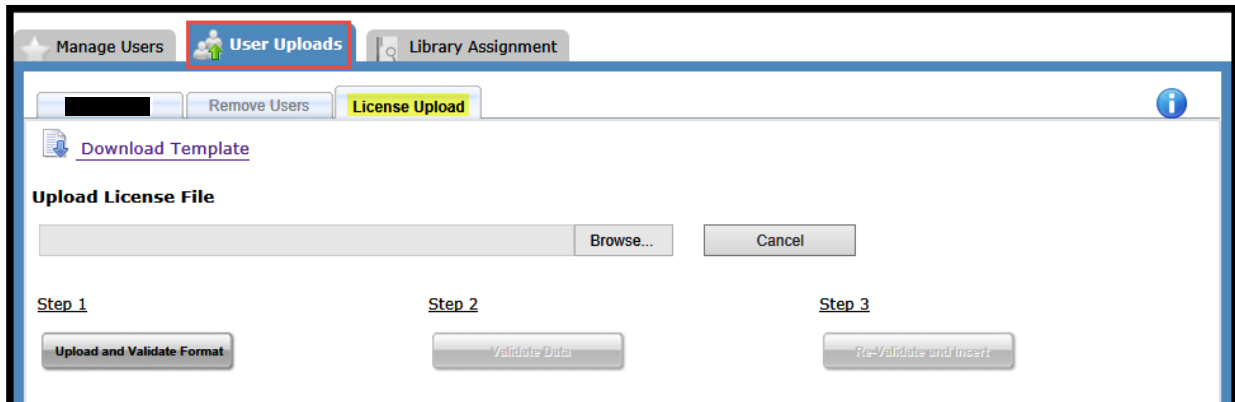
1. View all current course enrollments, all completions, as well as those assignments the user has not accepted. Ad Hoc training records for the selected user can be viewed on this tab as well.

The screenshot displays the 'Manage Users' interface with the 'User Certificates' tab selected. The user information for John Snow is shown, including his email and username. The 'Select License' dropdown is set to 'Non-License Specific'. Below this, there are radio buttons for 'Select Renewal Period' and 'Start Date *' / 'End Date *'. A 'View' button is present next to the date fields. A 'Print Certificate(s)' button is located to the right of the user information section. At the bottom, a table lists the user's completion records.

Course	Credit Hours	Completion Date	Status	Select All
ABCs of Goals Required Seat Time: Required Score: 0% Affidavit Received: Your Score: 83.33% Satisfies:	1.00	2/29/2016	✓	✓

- **User Certificates tab**

1. Select a License from the drop down list or enter a start and end date for a specific date range, then click on the *view* button to view all Certificate of Completion records.
2. View / print certificates by selecting the appropriate checkbox(es) in the right most column then click on the *print certificates* button.



- **License Upload tab**

1. Click on the *Download Template* link to download the User License Upload template.
2. Complete all of the fields with **red** column headers and save the file.
3. Browse for the saved file and complete steps 1-3.

Manage Users
User Uploads
Library Assignment

Assign
Upload

Step 1: Select Library

Keywords

Total Number of Libraries: 2

Select	Type	Item #	Library Name	Access Used	Access Count	Start Date	End Date	Created By	Create Date	Last Modified By	Actions
<input type="checkbox"/>		RVACLIB	AEC Complete	5	50	2/23/2016	12/31/9999	Givany,Colon	2/23/2016	Givany,Colon	View Details
<input type="checkbox"/>		RVAPDLIB	Professional Development	2	100	2/23/2016	12/31/9999	Givany,Colon	2/23/2016	Givany,Colon	View Details

Step 2: Select User(s)

Select by Account

Select by Job Role

Keywords

☐ Select all users on all pages

Total Number of Users : 5

	Username	First Name	Last Name	Email	Job Role	Assigned Libraries
<input type="checkbox"/>	JamieLanister	Jamie	Lanister	Jlanister@GOT.com		AEC Complete
<input type="checkbox"/>	JohnSnow	John	Snow	TheNorth@Remembers.com		AEC Complete
<input type="checkbox"/>	RickGrimes	Rick	Grimes	Walking@dead.com		AEC Complete, Professional Development
<input type="checkbox"/>	redvectordemo	RV	Demo	givany.colon@redvector.com		AEC Complete, Professional Development
<input type="checkbox"/>	SaulGoodman	Saul	Goodman	Saul.Goodman@BB.com		AEC Complete

Step 3: Process Library Assignment

Library Assignment page

Navigate to this section to assign course libraries to users. All users must have at least one library assigned to them in order to access courses.

- **Assign tab**

1. Select Library: select the checkbox(es) associated to the library or libraries to be assigned.
2. Select User(s): Search for a user by selecting a facility, a job role, or by entering a keyword, then click on the *search* button. Once displayed, select the checkbox(es) associated to the user(s) that the libraries are being assigned to.
3. Process Library Assignment: Click on the *assign* button.

Manage Users User Uploads **Library Assignment**

Assign Upload

[Download Template](#)

Upload Library File

Browse... Cancel

Step 1 Step 2

Upload & Validate Data Re-Validate And Assign

- **Upload tab**

1. Click on the *Download* template link to download the User Library Upload template.
2. Complete the fields with **red** column headers and save the file. (The library number value can be found on the *assign* tab)
3. Browse for the saved file and complete steps 1 and 2.

Manage Training

★ Course Assignments

Ad Hoc Training

Competency Assessment

History

Add Assignment

History

Select Year: 2016

Search

Search

Note: Records = No of Courses * No of Users

RP : Records Processed; RR : Records Remaining; RD : Records Deleted

If the expire date is more than 45 days old from today, records cannot be edited or deleted

Assignment Number	Title	Type	Account/Facility	Start Date	Expire Date	Date Assigned	Assigned By	Last Modified By	Last Modified Date	RP	RR	RD	% Completed	Action	Delete	Smart Assign	Library
160229-2032	New Hire Orientation Package	Package	RV Demo Account	2/29/2016	3/1/2017	2/29/2016	RV Demo	RV Demo	2/29/2016	0	4	0	0%	Edit	Delete	No	AEC Complete
160223-1924	New Implementation	Course	RV Demo Account	2/23/2016	2/23/2017	2/23/2016	RV Demo	RV Demo	2/23/2016	15	0	0	0%	Edit	Delete	No	AEC Complete

Course Assignments page

- History tab

- To view all previously created assignments for a specific year, select the year from the dropdown list and click on the *search* button.
- Narrow the search by entering an Account/Facility Name, Assignment Title or Assignment Number in the search text box, then click on the *search* button.

★ Course Assignments

Ad Hoc Training

Competency Assessment

History

Add Assignment

Step 1: Name your assignment

Assignment Name *

Email Address (optional)

email@company.com

Step 2: Choose start date and end date then Select Items to assign.

Start Date *

End Date *

Select a library *

AEC Complete

Select assignment type *

Courses

Select Items

Available Items

Selected Items

Search

Clear

(RV-W030316)03/03/2016: LIVE INTERACTIVE WEBINAR, Su

(RV-W031016)03/10/2016: LIVE INTERACTIVE WEBINAR, LE

(RV-W031516)03/15/2016: LIVE INTERACTIVE WEBINAR, De

(RV-W040116)04/01/2016: LIVE INTERACTIVE WEBINAR, Ind

(RV-W040516)04/05/2016: LIVE INTERACTIVE WEBINAR: Str

(RV-W041216)04/12/2016: LIVE INTERACTIVE WEBINAR, Hu

(RV-W041316)04/13/2016: LIVE INTERACTIVE WEBINAR, Co

>>

<<

Highlight an Item on the left then click on arrows >> to place it in the Selected Items box on the right.

Step 3: Set your Account/Region/Facility

Facility Search

Clear

RV Demo Account

-RV Location 2

-Department 1

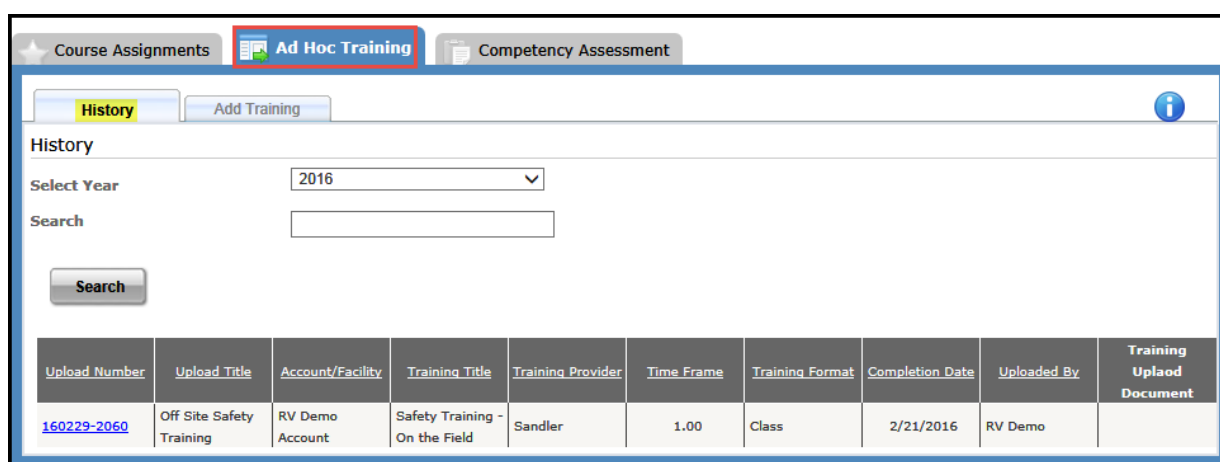
-RV Location 3

Continue

- **Add Assignment tab**

1. Complete all required fields marked with an asterisk (*).
2. If *Courses* is selected as the assignment type, the courses displayed are those that are in the selected library. If *Competency Assessment* is selected as the assignment type, the competency assessments displayed are those that are in the selected library. If *Package* is selected as the assignment type, the packages displayed are those that are in the selected library.
3. Select a different library value to see the corresponding Courses, Competency Assessments and Packages.
4. An assignment can contain a maximum of 10 courses, 10 Competency Assessments or one Package.

5. Select an Account/Region/Facility from the list provided then click on the *continue* button.
6. Select the checkbox(es) associated to the user(s) to receive this assignment, then select either the *Smart Assignment* or the *Basic Assignment* button.
 - a. By clicking the *Smart Assignment* button, users will be assigned only those selected items for which they have not enrolled in or have been assigned within the previous 90 days, therefore omitting any duplicate enrollments.
 - b. By clicking the *Basic Assignment* button, all users will be assigned all courses, regardless of previous enrollments or assignments. Using this option may create duplicate enrollments.
7. If an assignment has 30 or more records, it will be processed overnight. If an assignment has 29 or less records, it will be processed the same day it was submitted.



Upload Number	Upload Title	Account/Facility	Training Title	Training Provider	Time Frame	Training Format	Completion Date	Uploaded By	Training Upload Document
160229-2060	Off Site Safety Training	RV Demo Account	Safety Training - On the Field	Sandler	1.00	Class	2/21/2016	RV Demo	

Ad Hoc Training page

- **History tab**

1. To view all previously created Ad Hoc Training sessions for a specific year, select the year from the dropdown list and click on the *search* button.
2. Narrow the search by entering an Account/Facility Name, Upload Title or Upload Number in the *search* text box, then click on the *search* button.
3. To view the users associated to a specific Ad Hoc Training session, click on the corresponding *Upload Number* link.
4. To view the Training Document associated to a specific Ad Hoc Training session, click on the *Training Upload Document* link.

Course Assignments **Add Training** Competency Assessment

History **Add Training** ⓘ

Step 1: Name your Ad Hoc Training Session

Session Name *

Email Address (optional)

Step 2: Enter your Training Information and Completion Date

Training Title * User Expenses (\$)

Training Provider * Completion Date *

Training Format Time Frame (Hours) *

Training Description

Step 3: Set your Account/ Region/ Facility

RV Demo Account
--RV Location 2
--Department 1
--RV Location 3

Training Upload Document

- **Add Training tab**

1. Complete all the required fields marked with an asterisk (*).
2. Select an Account/Region/Facility from the list provided then click on the *continue* button at the bottom of the page.
3. Select the checkbox(es) associated to the user(s) that are to be assigned this activity.
 - a. Search for a specific user by entering the users' last name in the Last Name textbox then click on the *search* button.
 - b. Search for a group of users by selecting a job role from the drop down menu, then click on the *search* button.
4. Click on the *submit* button.

Course Assignments Ad Hoc Training **Competency Assessment** Instructor-led Training

History Add Assignment Begin Observations Manage Observer Bulk Observations

History

Select Year: 2014

Search:

Search

Note: Records = No of Courses * No of Users
 RP : Records Processed; RR : Records Remaining; RD : Records Deleted

If the expire date is more than 45 days old from today, records cannot be edited or deleted

Assignment Number	Title	Type	Account/Facility	Start Date	Expire Date	Date Assigned	Assigned By	Last Modified By	Last Modified Date	RP	RR	RD	% Completed	Action	Delete	Smart Assign	Library
141007-1498	Competency Assessment Example	Competency Assessment	Sales Demo Account - CINet	10/7/2014	10/7/2015	10/7/2014	Sales Admin	Sales Admin	10/7/2014	1	0	0	0%	Edit	Delete	Yes	Industrial Master

Competency Assessment page

- A Competency Assessment is created in the **Manage Library** section, on the Custom Courses tab.
- **History tab**
 1. View all previously created Competency Assessments by selecting a specific year from the dropdown list then click on the *search* button.
 2. To view the users associated to a specific Competency Assessment, click on the corresponding *Assignment Number* link.
 3. To change the Expire Date value, click on the *Edit* link. To delete the Competency Assessment, click on the *delete* link.

Course Assignments | Ad Hoc Training | **Competency Assessment** | Instructor-led Training

History | **Add Assignment** | Begin Observations | Manage Observer | Bulk Observations

Step 1: Name your assignment

Assignment Name *

Email Address (optional)

Step 2: Choose start date and end date then Select Items to assign.

Start Date *

End Date *

Select a library *

Select assignment type *

Select Items

Available Items

(RV-CC-1468)Competency: Competency Assessment Example

Selected Items

- **Add Assignment tab**

1. Complete all of the required fields marked with an asterisk (*).
2. Competency Assessment is the only option in the Select Assignment Type drop down menu.
3. The Competency Assessments available to be assigned are related to the library selected. Select a different library to see the Competency Assessments associated to the newly selected library.
4. Select an Account/Region/Facility from the list provided then click on the *continue* button.
5. Select the checkbox(es) associated to the user(s) that you would like to assign the Competency Assessment to then select either the *Smart Assignment* or the *Basic Assignment* button.
 - a. By clicking the *Smart Assignment* button, users will be assigned only those selected items for which they have not enrolled in or have been assigned within the previous 90 days, therefore omitting any duplicate enrollments.
 - b. By clicking the *Basic Assignment* button, all users will be assigned all courses, regardless of previous enrollments or assignments. Using this option may create duplicate enrollments.

The screenshot shows the 'Competency Assessment' tab selected in the top navigation bar. Below it, the 'Begin Observations' sub-tab is active. The interface includes a 'Begin Observation' section with input fields for 'First Name' (containing 'diana') and 'Last Name'. A 'Search' button is located below these fields. At the bottom, a table displays search results with columns: Facility Name, First Name, Last Name, Username, and Competency Assessment. The first row shows 'Sales Demo Account - CiNet', 'Diana', 'Prince', 'wonderwoman', and a 'View All' link.

Facility Name	First Name	Last Name	Username	Competency Assessment
Sales Demo Account - CiNet	Diana	Prince	wonderwoman	View All

- **Begin Observations tab**

1. Click on the *search* button without entering any search criteria to see all of the users in the account.
2. To narrow the search results, enter a users' first and/or last name, then click on the *search* button.
3. Click on the *view all* link that corresponds to the selected user to see all of the Competency Assessments assigned to that user.

The screenshot shows the 'Competency Assessment' tab selected in the top navigation bar. Below it, the 'Manage Observer' sub-tab is active. The interface includes a 'Manage Observer' section with input fields for 'First Name' and 'Last Name'. There are two buttons: 'Search' and 'Show Current Observers'. At the bottom, a table displays observer information with columns: Observer Rights, Facility Name, First Name, Last Name, and Username. The first row shows a checked checkbox in the 'Observer Rights' column, a 'Save' button, 'Sales Demo Account - CiNet', 'Sales', 'Admin', and 'salesadmin'.

Observer Rights	Facility Name	First Name	Last Name	Username
<input checked="" type="checkbox"/> <input type="button" value="Save"/>	Sales Demo Account - CiNet	Sales	Admin	salesadmin

- **Manage Observer tab**

1. Click on the *search* button without entering any search criteria to see all of the users in the account.
2. To narrow the search results, enter the users' first and/or last name, then click on the *search* button.
3. Click on the *Show Current Observers* button to display a list of users that have the Observer security role assigned to them.
4. To give a specific user observer rights, select the corresponding checkbox in the Observer Rights column and click on the *save* button.

The screenshot shows the 'Bulk Observations' tab within the 'Competency Assessment' section. The interface includes a navigation bar with tabs: Course Assignments, Ad Hoc Training, Competency Assessment (highlighted), and Instructor-led Training. Below the navigation bar, there are sub-tabs: History, Add Assignment, Begin Observations, Manage Observer, and Bulk Observations (highlighted). The main form area contains the following fields:

- Select Competency:** A dropdown menu with the text '-----SELECT COMPETENCY-----' and a 'Clear' button.
- Select Observer:** A dropdown menu with the text 'Sales Admin'.
- Observation Date *:** A date input field with a calendar icon.
- Comments:** A large text area for entering comments.

- **Bulk Observations tab**

1. To display a list of users that have not completed a specific Competency Assessment, select the Competency Assessment from the drop down list.
2. Select the checkbox(es) associated to the user(s) to be observed, then click on the *Submit Observations* button to submit a passing observation for the user(s) selected.

The screenshot shows the 'Manage Sessions' section within the 'Instructor-Led Training' page. The interface includes a navigation bar with tabs: COURSE ASSIGNMENT, AD HOC TRAINING, GROUP TRAINING, COMPETENCY ASSESSMENT, and INSTRUCTOR-LED TRAINING (highlighted). Below the navigation bar, there is a 'MANAGE SESSIONS' section with the text 'Use this tool to manage your account's Instructor-led sessions.' and a 'Hide' link. The main form area contains the following fields:

- City:** A text input field.
- State:** A dropdown menu with the text '-- Any State --'.
- Session Type:** A dropdown menu with the text 'Any'.
- Date Range (From):** A date input field with the text 'MM/DD/YYYY' and a calendar icon.
- Date Range (Until):** A date input field with the text 'MM/DD/YYYY' and a calendar icon.
- Instructor:** A text input field.
- Course:** A text input field with the text 'Item # or Course Title' and a 'FIND COURSE' button.
- Keywords:** A text input field with the text 'Search Keywords' and a 'SEARCH' button.

Below the form fields, there is a table displaying session information:

Item #	Session Name	Date	Location	Instructor	Registration
RV-IL-2...	New Hire Orientation Training	2016-01-25	Tampa, FL	Givany	<input type="checkbox"/> OPEN
RV-IL-2...	Testing 123	2015-09-04	Tampa, FL	Givany	<input type="checkbox"/> OPEN
RV-IL-2...	ILT Training Demo	2015-09-04	Tampa, FL	Givany	<input type="checkbox"/> OPEN

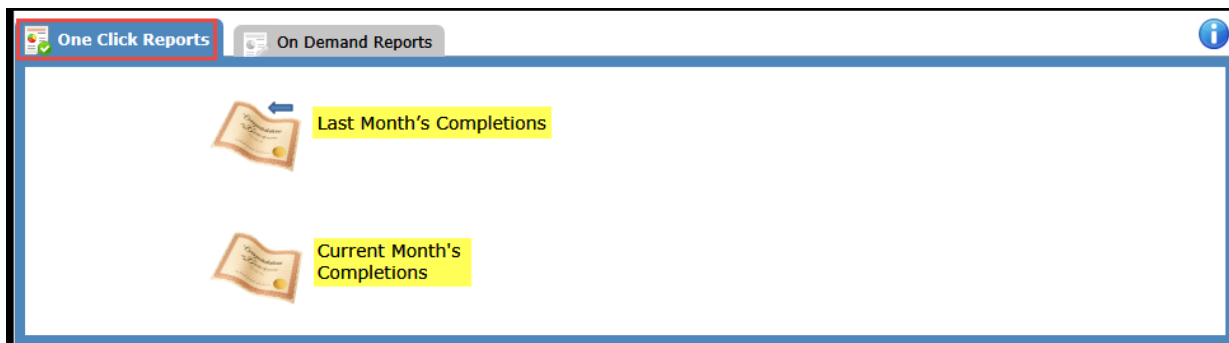
At the bottom of the table, there is a pagination control showing '1' and '3 Results', and a 'CREATE SESSION' button.

Instructor-Led Training Page

- **Manage Sessions Section**

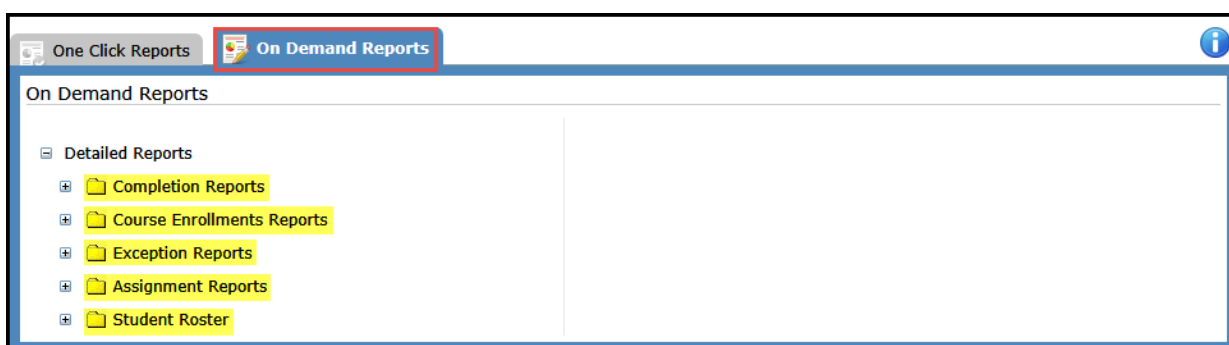
1. Click on the *create session* button and complete the highlighted fields to create a new Instructor-Led Training Session.
2. Previously created sessions are automatically displayed at the bottom of the Manage Sessions grid.

Reports



One Click Reports

- Last Month's Completions: Click on this link to see all of the completions for the previous month.
- Current Month's Completions: Click on this link to see the completions for the current month.
- Once the report is generated, it can be viewed/saved in one of seven different formats (XML file with report data, CSV, PFD, MHTML, Excel, TIFF & Word), or it can be printed.



On Demand Reports

- All of the On Demand Reports require the user to enter or select search criteria such as a date range, a facility/location, a job role, a username, etc.
- Once the report is generated, it can be saved in one of the previously mentioned seven formats, or it can be printed.

Settings

JOB ROLES | AUTO ASSIGNMENTS | NOTIFICATIONS | SECURITY

MANAGE JOB ROLES

Job Role Title ▲	# of Users	Last Modified By	Last Modified On	
Architect	0 (view users)	RV Demo	02/23/2016	
Engineers	0 (view users)	RV Demo	02/23/2016	
Land Surveyor	0 (view users)	RV Demo	02/23/2016	
PMI Professional	0 (view users)	RV Demo	02/23/2016	

< > 1 4 Results [ADD A JOB ROLE](#)

Job Roles

- In this section existing job roles can be viewed, changed or removed and new job roles can be added.

The screenshot shows the 'AUTO ASSIGNMENTS' section with the 'TRAINING CALENDAR' tab selected. The page has a top navigation bar with 'JOB ROLES', 'AUTO ASSIGNMENTS', 'NOTIFICATIONS', and 'SECURITY'. Below the navigation bar, there are two tabs: 'TRAINING CALENDAR' (active) and 'NEW USER'. A description states: 'This calendar allows you to manage, plan and assign future training by month. All assignments occur on the 1st of each month.' Below this are three buttons: 'MANAGE', 'VIEW SCHEDULE', and 'CREATE'. A search filter section includes 'Status' (Active), 'Last Modified By' (Anyone), and 'Keywords' (Search Keywords). A table lists one result: 'Safety Refresher Training' by 'RV Demo' on '2016-02-29'. A 'CREATE A NEW AUTO-ASSIGNMENT' button is at the bottom right.

Status	Last Modified By	Keywords
Active	Anyone	Search Keywords

Auto-Assignment Name	Last Modified By	Last Modified On
Safety Refresher Training	RV Demo	2016-02-29

Auto Assignments

- **Training Calendar:**

1. Existing Auto Assignments are automatically displayed.
2. Use this type of auto assignment to make assignments by specific job role for selected months that will happen year after year.
3. Manage, plan and assign future training by month. All assignments occur on the 1st of each month.

The screenshot shows the 'AUTO ASSIGNMENTS' section with the 'NEW USER' tab selected. The page has a top navigation bar with 'JOB ROLES', 'AUTO ASSIGNMENTS', 'NOTIFICATIONS', and 'SECURITY'. Below the navigation bar, there are two tabs: 'TRAINING CALENDAR' and 'NEW USER' (active). A description states: 'New User assignment allows you to set up assignments for your users when they are added to the system. These assignments can be global or filtered by job role. Assignments can be made with one course, one package or a group of courses.' Below this are two buttons: 'MANAGE' and 'CREATE'. A search filter section includes 'Status' (Active), 'Last Modified By' (Anyone), and 'Keywords' (Search Keywords). A table lists one result: 'Ethics Refresher' by 'RV Demo' on '2016-02-29'. A 'CREATE A NEW AUTO-ASSIGNMENT' button is at the bottom right.

Status	Last Modified By	Keywords
Active	Anyone	Search Keywords

Auto-Assignment Name	Last Modified By	Last Modified On
Ethics Refresher	RV Demo	2016-02-29

- **New User:**

1. Existing active Auto Assignments are automatically displayed.
2. Use this type of Auto Assignment to make assignments to user(s) when they are newly added into the system.
3. This type of Auto Assignment can be assigned globally or by job role.

Job Roles
Auto Assignment
23 Notifications

Reminder Settings Override

Select the checkboxes below to allow Users to receive Reminder Notifications via Work Email.

Settings can be overridden by users (Users have to validate their email address prior to receiving any notifications below)

	Work Email
Course Expiration Reminder - 2 Weeks Prior	<input checked="" type="checkbox"/>
License Expiration Reminder - 30 Days Prior	<input checked="" type="checkbox"/>

Settings cannot be overridden by users (System will attempt to send the email if the email is verified)

	Days after enrollment	Work Email
Course Assignment Notification		<input checked="" type="checkbox"/>
Course Completion Reminder (1st Reminder)	<input type="text" value="30"/>	<input type="checkbox"/>
Course Completion Reminder (2nd Reminder)	<input type="text" value="60"/>	<input type="checkbox"/>

Notifications

- There are two types of reminder notifications that can be set at the global/account level; those that can be overridden by the user and those that CANNOT be overridden by the user.
- Those that can be overridden by the user include:
 - Course Expiration Reminder – sent two weeks prior to a course expiration date.
 - License Expiration Reminder – sent 30 days prior to a license expiration date.
- Those that CANNOT be overridden by the user include:
 - Course Assignment Notification – sent when a new course/competency assessment/package has been assigned to the user.
 - Course Completion Reminder (first reminder) – Sent a specified number of days AFTER a user has enrolled/been enrolled in a course. (default value of 30 days)
 - Course Completion Reminder (second reminder) – Sent a specified number of days AFTER a user has enrolled/been enrolled in a course. (default value of 60 days)

JOB ROLES
AUTO ASSIGNMENTS
NOTIFICATIONS
SECURITY

SECURITY ROLES
JOHN SNOW
HELP ?

Name John Snow
Job Role No title

Username JohnSnow
Facility RV Location 3

Email TheNorth@Remembers.com
Access Level RV Location 3 ([change access level](#))

SECURITY ROLE SETTINGS

Security Role	Modified By	Modified On	Status
Corporate Training Administrator	RV Demo	2/23/2016 2:06:49 PM	<input type="checkbox"/> ON
Manager	RV Demo	2/23/2016 2:06:49 PM	<input type="checkbox"/> ON
New - Observer	RV Demo	2/23/2016 2:06:49 PM	<input checked="" type="checkbox"/> OFF
Reports	RV Demo	2/23/2016 2:06:49 PM	<input type="checkbox"/> ON
Instructor (disabled)			<input type="checkbox"/>
Master System Admin	N/A	1/1/1900 12:00:00 AM	<input checked="" type="checkbox"/> OFF
Training Coordinator	RV Demo	2/23/2016 2:06:49 PM	<input type="checkbox"/> ON
Human Resources	RV Demo	2/23/2016 2:06:49 PM	<input checked="" type="checkbox"/> OFF

BACK
CANCEL
SAVE

Security

- In this section, Security Roles are assigned.
 - There are a total of eight (8) security roles.
 - To see the specific functions associated to each security role, click on that is at the end of each security role title.

Manage Library

The screenshot shows the 'Manage Library' interface with the 'Course Packages' tab selected. The 'Manage Packages' section includes filters for Library (ALL), Status (ALL), and Keywords. Below the filters are 'Search' and 'Clear' buttons. A table displays the following data:

Item #	Package Name	Library Name	Created By	Create Date	Last Modified By	Status	Actions
CPKG-03448	NEW! Safety Training - New Hires	AEC Complete	Demo, RV	2/29/2016	Demo, RV	Pending	Edit Copy
CPKG-03435	OnBoarding Package	AEC Complete	Demo, RV	2/23/2016	Demo, RV	Published - Assign Only	View Details Copy

Course Packages Page

- **Manage Packages tab**

1. All packages will automatically be displayed on this page.
2. To find all of the packages associated to a specific library, select a library from the drop down list then click on the *search* button.
3. To find all of the packages with a specific status, select a status from the drop down list then click on the *search* button.
4. Enter a word/partial word used in the package name or the item number/partial item number in the Keywords field and then click on the *search* button to display those packages that match the search criteria.

Course Packages Custom Courses

Manage Packages **Add/Edit Package**

Add/Edit Package

Package Type: Certificate Packages

Select Library: AEC Complete

Package Name*:

Package Description (As shown in details page)

Rich Text Editor: B I U [List Icons]

Normal HTML Preview Words:0 Characters:0

Buttons: Publish Cancel Save

Sort	Item #	Type	Title	Hours	Actions

Total Training Hours:0
Course Count:0

- Add/Edit Packages tab – There are two (2) types of packages; certificate package and package.
 1. Certificate Package:
 - a. Can contain a maximum of 50 courses
 - b. The courses can be placed in a specified sequence, requiring the user to complete the courses in the specified sequence order
 - c. A certificate of completion is associated to each individual course as well as the overall package
 2. Package:
 - a. Can contain a maximum of 50 courses
 - b. The courses can be taken in any order
 - c. A certificate of completion is associated to each individual course *only*

Course Packages **Custom Courses**

Manage Courses Course Launch

Manage Custom Courses

All of your courses are listed below.
Click on the actions below to edit or archive your courses.
Be sure to that your courses are not included in any packages before you try to archive the course.

Status:

Keywords:

Type	Item #	Course Name	Created By	Create Date	Last Modified By	Status	Actions
	RV-CU-3013	Employee Handbook	Demo, RV	2/23/2016	Demo, RV	Pending	

Custom Courses Page

- **Manage Courses tab**

1. Click on the *search* button without any search criteria to display all custom courses (Instructor-Led Training & Competency Assessments).
2. To find all of the custom courses with a specific status, select a status from the drop down list then click on the *search* button.
3. Enter a word/partial word used in the course name or the item number/partial item number in the Keywords field and then click on the *search* button to display those custom courses that match the search criteria.
4. Click on the pencil icon to make changes to the custom course.
5. Click on the folder/lock icon to archive the custom course.

The screenshot displays the 'Custom Courses' section of the Manager User Guide. The 'Course Launch' tab is selected, showing a progress bar with steps 1 through 6. Step 1, 'Details', is the current step. The form includes fields for Course Type (Online Course), Course Title*, Author* (with an 'Add New Author' button), Level*, Category*, and Hours*. There are also text areas for Description* and Objectives*, both with 3000 max characters. A 'Save & Proceed' button is visible.

Custom Courses Page

- **Course Launch tab** – this is where custom courses (Online Course, Instructor-Led Training or Competency Assessment) are created.
 1. **DETAILS:** Complete all fields, then click on the *save and proceed* button.
 2. **UPLOAD:** Browse for a saved file to attach to the custom course, then click on the *save and proceed* button.
 3. **EXAM:** Create an exam, then click on the *save and proceed* button.
 4. **SURVEY:** Associate a survey if you wish, then click on the *save and proceed* button.
 5. **REVIEW:** Review the Custom Course to make sure it is correct, then click on the *save and proceed* button.
 6. **TEST & PREVIEW:** Enroll in the course you created so that you can see it as the users will, or publish it without enrolling first.
 7. Once a custom course has been created it can then be assigned.

Statement of Confidentiality and Non-Disclosure

This document contains proprietary and confidential information. All data submitted is provided in reliance upon its consent not to use or disclose any information contained herein except in the context of its business dealings with RedVector. The recipient of this document agrees to inform present and future employees of the company who view or have access to its content of its confidential nature and instruct each employee that they must not disclose any information concerning this document to others except to the extent that such matters are generally known to, and are available for use by, the public. The recipient also agrees not to duplicate or distribute or permit others to duplicate or distribute any material contained herein without RedVectors' express written consent.

RedVector retains all title, ownership and intellectual property rights to the material and trademarks contained herein, including all supporting documentation, files, marketing material, and multimedia.

BY ACCEPTANCE OF THIS DOCUMENT, THE RECIPIENT AGREES TO BE BOUND BY THE AFOREMENTIONED STATEMENT.

RedVector

4890 West Kennedy Blvd.

Suite 300

Tampa, FL 33609

800.624.2272

www.redvector.com

All information included in this document is the exclusive property of RedVector and protected by United States and international copyright laws. The information is subject to change without notice and does not represent a commitment on the part of RedVector.

Copyright © 2016 RedVector. All rights reserved.