

Online Learning: How to manage learners as an administrator

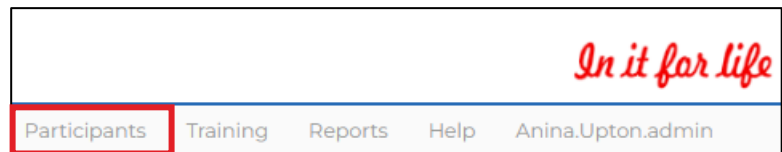
If you have any questions, problems or feedback please contact your club administrator or member.education@surflifesaving.org.nz.

Learner menus

Once you log into the Member Portal and access the LMS, it allows you to manage your member's accounts within your **administrator access** view. (See the "Switching between accounts" guidance document if needed).

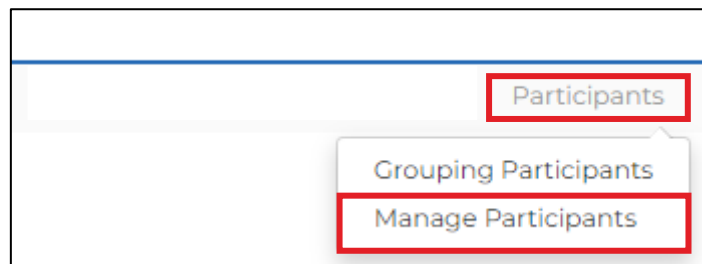
Under the
"Participants/Learners Menu"
... You can:

- Group Learners
- Manage Learners

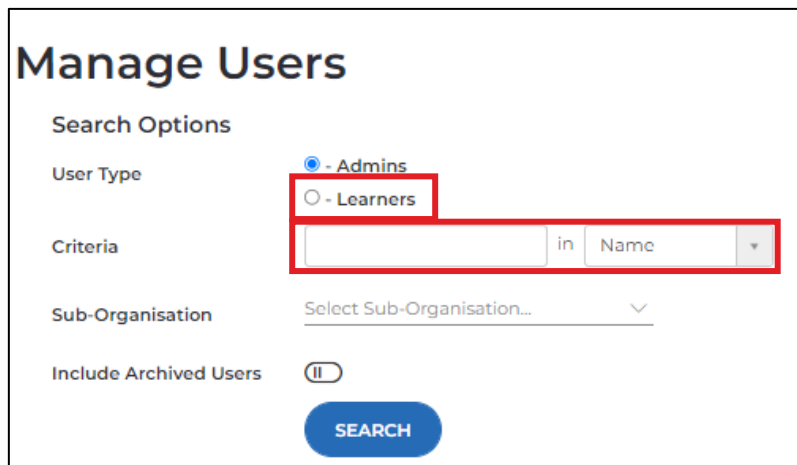


Search for the learner

1. Click "Participants/Learners", followed by "Manage Participants/Learners".



2. Select "Learners" from the **User Type** (Note, only regional and national admins can search for "admins")
3. Within the search **criteria**, type the name or membership number of the learner you wish to locate and select the type of criteria by selecting from the drop-down box (**Note:** If you search by membership number, change the drop down to 'username').



Manage Users

Search Options

User Type - Admins - Learners

Criteria in Name

Sub-Organisation

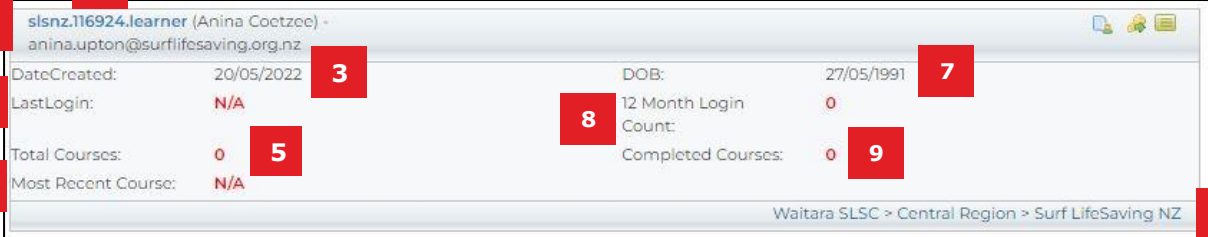
Include Archived Users

SEARCH

4. Click "Search"

Note: Click on the Include Archived Users toggle if you cannot locate the Learner in case their account has been archived. Learners are archived if they leave SLSNZ and have been turned inactive in the SLSNZ CRM/PAM database.

When your search has been run, there is a lot of learner information you can view here:



The screenshot shows a learner profile for 'Anina Cootzee' with the following fields and values:

1	slnz.116924.learner (Anina Cootzee) - anina.upton@surflifesaving.org.nz		2
3	DateCreated: 20/05/2022	7	DOB: 27/05/1991
4	LastLogin: N/A	8	12 Month Login Count: 0
5	Total Courses: 0	9	Completed Courses: 0
6	Most Recent Course: N/A		
Waitara SLSC > Central Region > Surf LifeSaving NZ			
10			

1. **Username (in blue)**
2. **Name and email of the learner**
3. **Date their account was created**
4. **Date the learner last logged in**
5. **Total modules (parts of courses) that have been allocated to the learner** – ignore this as it is not useful
6. **Date most recent course was accessed**
7. **The learner's date of birth** – Note: if this needs to be updated, it needs to be done in the CRM (by an administrator) or via the Member Portal (by the member).
8. **12 Month login:** This outlines the number of times the learner has logged into the etrainu platform in the last 12 months.
9. **Completed courses:** This outlines the number of courses the learner has completed.
10. This shows the learner's **CLUB > REGION > Surf Lifesaving NZ**

In addition to the above snapshot, as an LMS administrator you will have access to perform the following:

slnz.116924.learner (Anina Cootzee) - anina.upton@surflifesaving.org.nz			
DateCreated:	20/05/2022	DOB:	27/05/1991
LastLogin:	N/A	12 Month Login Count:	0
Total Courses:	0	Completed Courses:	0
Most Recent Course:	N/A		

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Depending on access you have been provided with, administrations can:



1. **Documents:** This allows you to upload additional documentation relevant for the learner's account.
2. **Send keys:** This icon allows you to enrol learners into training **IF they meet the pre-requisites.**
3. **View training:** This allows you to view at a deeper level the training results and progress of the learner.

Enrol a learner

Once you find the learner you wish to enrol in the search results at the bottom of the screen:

1. Locate the learner's information box
2. Click on the "**Send Keys**" icon in the top right hand corner of the learners information box









slnz.116924.learner (Anina Cootzee) - anina.upton@surflifesaving.org.nz			
DateCreated:	20/05/2022	DOB:	27/05/1991
LastLogin:	N/A	12 Month Login Count:	0
Total Courses:	0	Completed Courses:	0
Most Recent Course:	N/A		

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- All course categories will show for that learner. Click into the Course Category (that holds the course you want to enroll them learner into) by clicking on **“View Courses”**.

Course Categories





Courses for *Anina Upton*

 <p>SLSNZ Regional Guard</p> <p>VIEW COURSES</p>	 <p>Refreshers</p> <p>VIEW COURSES</p>	 <p>Lifesaving – Surf Lifeguard</p> <p>VIEW COURSES</p>	 <p>Lifesaving - Powercraft</p> <p>VIEW COURSES</p>
 <p>Lifesaving – Instructor/Facilitator/Examiner/Assessor</p> <p>VIEW COURSES</p>	 <p>Search and Rescue (SAR)</p> <p>VIEW COURSES</p>	 <p>First Aid</p> <p>VIEW COURSES</p>	 <p>Health, Safety and Wellbeing</p> <p>VIEW COURSES</p>

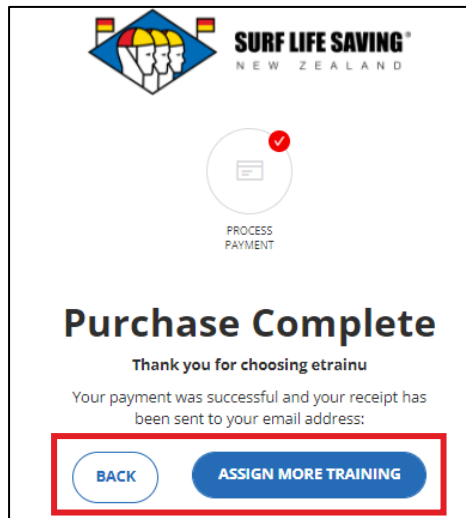
- All courses available for enrolment will show. Locate the one you would like to enrol your learner into and click on **“Enrol”**.

Courses in Lifesaving – Surf Lifeguard

Courses for *Anina Coetzee*

 <p>Introduction to SurfCom – Online Module</p> <p>SLSNZ - Surf Lifesaving New Zealand</p> <p>This module provides members with a fundamental understanding of how SurfCom works.</p> <p>Free ENROL</p>	 <p>Be Safer: A Risk Management Online Module</p> <p>SLSNZ - Surf Lifesaving New Zealand</p> <p>Free ENROL</p>	 <p>Surf Lifeguard Award (SLA) Refresher</p> <p>SLSNZ - Surf Lifesaving New Zealand</p> <p>Free ENROL</p>	 <p>Patrol Support (PS) Refresher</p> <p>SLSNZ - Surf Lifesaving New Zealand</p> <p>Free ENROL</p>
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- Once processed, click **“Assign More Training”** if you wish to assign more training to that **same learner**, or select **“Back”** to be taken back to the Manage Learner screen.



Note: Although it says “Purchase”, SLSNZ is not selling courses to learners and this is just system terminology.

Check a learner’s training record

This allows you to view the progress status of a learner’s training. ***This ONLY applies to their progress of courses in the LMS. The CRM/PAM is still the single source of truth for member awards and records.***

- Locate the learner
- Click on the **“View Training”** icon

slnz.116924.learner (Anina Cootzee) - anina.upton@surflifesaving.org.nz			
DateCreated:	20/05/2022	DOB:	27/05/1991
LastLogin:	N/A	12 Month Login Count:	0
Total Courses:	0	Completed Courses:	0
Most Recent Course:	N/A		

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3. Within this screen, you can see:

manage participants | view training

View Training

Legend: view results view certificate view custom certificate no certificate available no permissions to view certificate

View Training for *Anina Upton*

The amount of information available below depends upon the access a participant has to you.

Click on the header to sort by that column.

1	2	3	4	5	6	7	
Training Name	Code	Provider	Status	Details	Documents	Actions	
SLSNZ - Be Safer: A Risk Management Online Module (Bundle)		Slsnz - Surf Lifesaving New Zealand	In Progress	Access Given 04/04/2022 Training Expires 04/04/2023		Course Actions ▾	
- SLSNZ - Be Safer: A Risk Management Online Module		Slsnz - Surf Lifesaving New Zealand	Not Started	Access Given 04/04/2022		Module Actions ▾	

- 1. Course (Bundle) Name:** This is the course name the learner has enrolled into.
- 2. Module(s) (Induction) Name:** These are the modules (or inductions) that make up the course. Note the "parts" of the course are the ones with the dash (-) bullets.
- 3. Code:** N/A please ignore
- 4. Provider:** Supplier that the training is under in the back end of the system.
- 5. Status:** This section outlines whether the course/module is ***In Progress, Not Yet Started, or Complete.***
- 6. Details:** This section outlines the date on which the course was allocated, completed, and marked as competent.
- 7. Documents:** Certificates (if applicable) can be accessed here. This does not apply to documents YOU add to a learner's account (see next section), but applies to certificates generated by the LMS.

For the "Actions" column, you'll note the "Course Actions" has a "Recalculate" button. You can click this to immediately update a learner's record (i.e. if they had finished a course 10 seconds ago, it will show). It's like a "refresh" button, but not really needed.

Upload a document to a learner's account

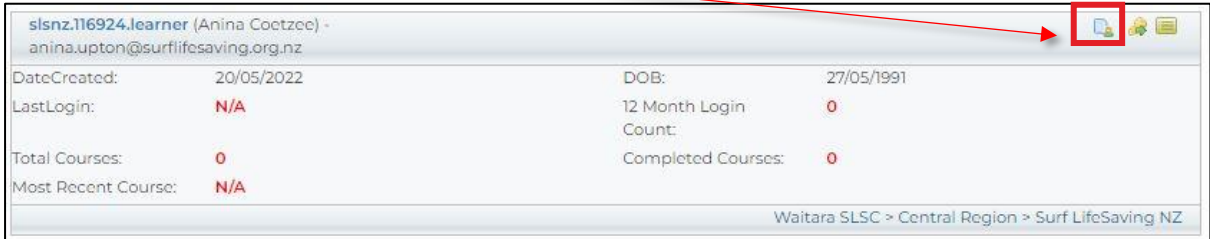
Adding documents to a learner's account can be a great place to store information not elsewhere stored.

There is currently no instance where 'uploading a document to a learner account' is required for SLSNZ. These instructions are for future use only.

Notes:

- Documents you add here, are NOT available in the **CRM/PAM or other systems**, they are for your reference only.
- These documents are not visible to a learner/member, but other administrators can see them.
- Documents can't be deleted once added, but can be archived.

1. Locate the learner as per the steps covered before
2. Click on the "**Documents**" icon

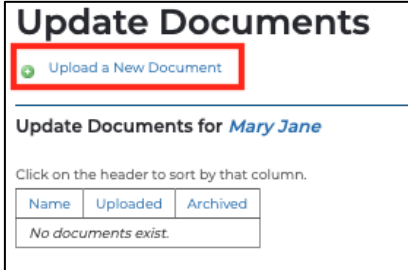


slnz.116924.learner (Anina Coetzee) -
anina.upton@surf lifesaving.org.nz

DateCreated:	20/05/2022	DOB:	27/05/1991
LastLogin:	N/A	12 Month Login Count:	0
Total Courses:	0	Completed Courses:	0
Most Recent Course:	N/A		

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3. Click on "**Update a New Document**"



Update Documents

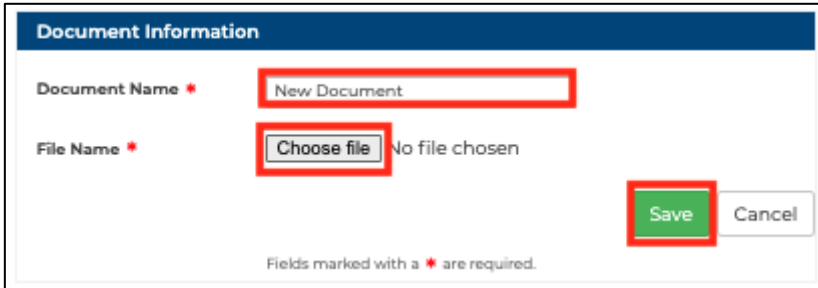
[Upload a New Document](#)

Update Documents for *Mary Jane*

Click on the header to sort by that column.

Name	Uploaded	Archived
No documents exist.		

4. Complete the document upload information:
 - a. Give the document a name
 - b. Upload a document using the "**Choose File**" button (locate the file from your computer files)



Document Information

Document Name *

File Name * No file chosen

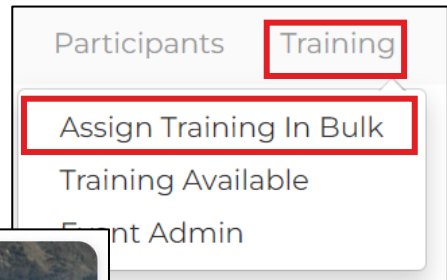
Fields marked with a * are required.

5. Click "**Save**"

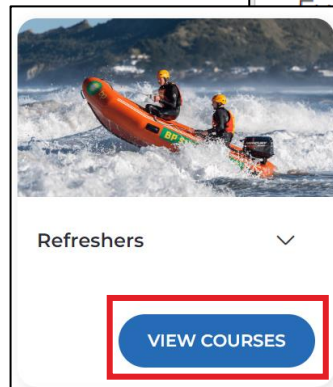
To bulk enrol more than one (1+) learner into the same course:

Once you are in the etrainu LMS and have switched to your admin view, follow these steps:

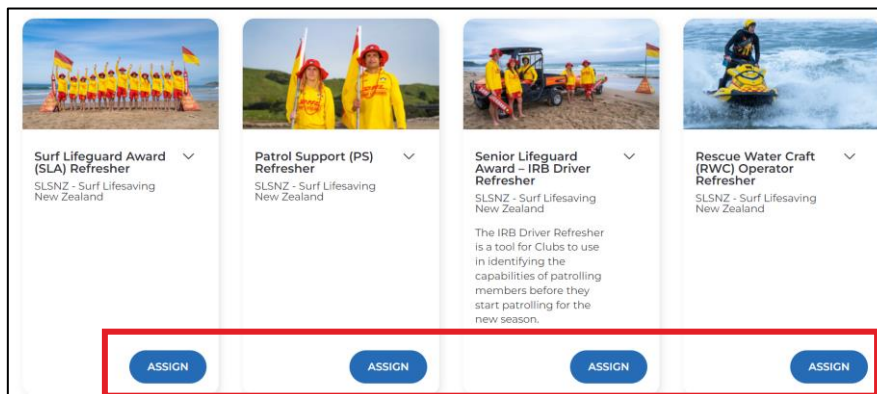
1. Click on **"Training"** in top bar menu, and then select **"Assign Training in Bulk"**



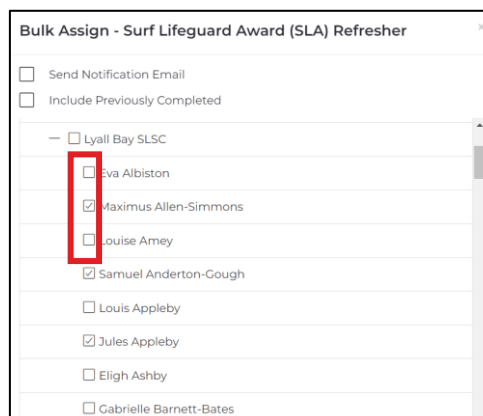
2. All course categories will show. Click into the Course Category by clicking on **"View Courses"**



3. All courses available for enrolment will show. Locate the one, you would like to enrol your learners into and click on **"Assign"**



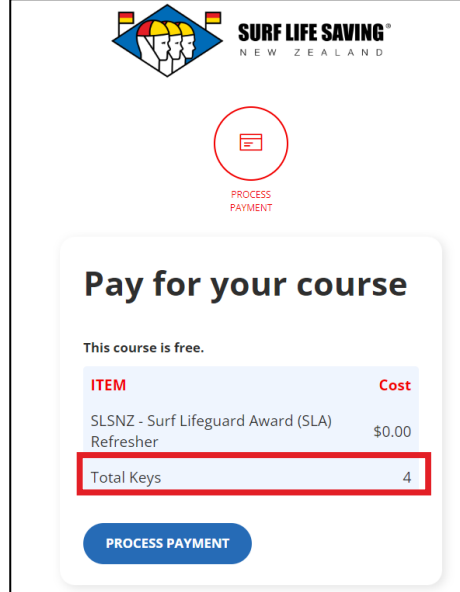
4. Your club will show with a plus icon.
 - a. Click on the plus icon to expand the list and see a list of all your learners.
 - b. Tick the boxes next to the learners you wish to enrol.



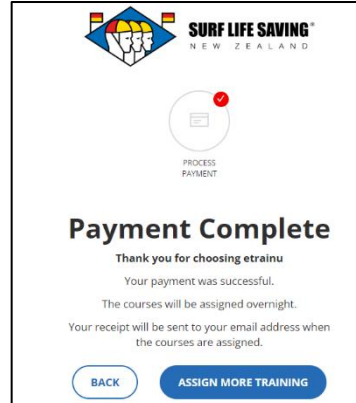
- Once you have selected all your learners, click on the "Assign" button at the bottom right hand corner of the pop up (**Note:** you may need to scroll down to see this)



- This "Pay for your course" screen will pop up, **key notes:**
 - Our courses are free, so this will always show as \$0.00.
 - We are working on changing this page in the future.
 - Check the "Total keys", this shows you how many people you "bulk enrolled".
- Click on "**Process Payment**"



- Click "**Back**" on the "Payment Complete" screen to return to the "course categories;" OR click "**Assign more training**" if you'd like to do more enrolment for another refresher.
- Click on you "**Home**" menu item to finish.



NOTES:

- Bulk assign only gets processed overnight, **so learners will be enrolled the following day!! Please do not assign training twice.**
- You can on the day after you do the bulk enrolment, run a "**Bulk Course Distribution**" Report, to see if any members were **NOT enrolled as they did not meet the pre-requisites.** (See the 'Administrator Reports' Guidance Document for more info on this report).