

Administrative Organization Management

Purpose:

With the Administrative Organizations feature, TRAIN administrators can grant administrative course privileges to a specific organization.

Administrators can create new administrative organizations, manage their members, assign course report manager and course provider roles, and associate new organizations with specific courses.

Administrative Roles with Access:

- **Administrators** (general)
- **Course Provider Organization Manager**

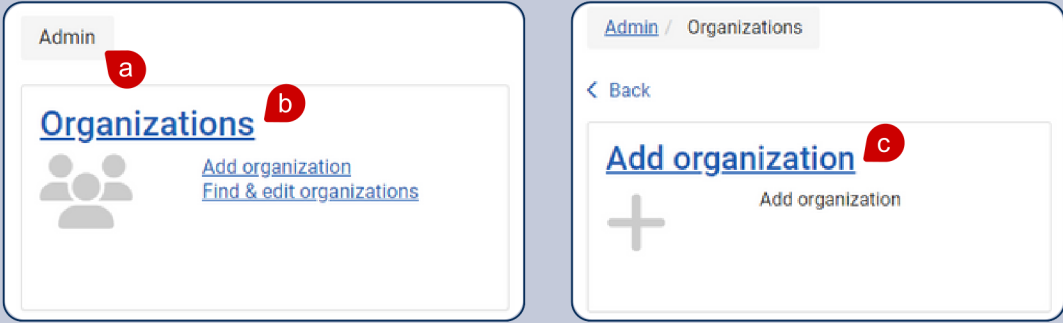
Table of Contents:

• Navigate to Organizations	2
• Create an Organization	2
• Manage Members	3
• Add an Administrative Organization to a Course	4
• Find and Edit Organizations	5

1

Navigate to Organizations

Go to the (a) **Admin** menu. Click the (b) **Organizations** tile. Then, click the (c) **Add organization** tile.



Create an Organization

2

Fill in the information about the organization you want to create.

(a) **Name:** Type the name of the organization here.

You can provide an acronym or shorthand of the organization in the text field marked “Short Name” below. The “Short Name” will be visible for learners in the course catalog and its search filters.

- (b) **Website:** If the organization has a website, you can input the URL here.
- (c) **Primary Email:** Provide an organizational email here. This is typically an email used by the general public to contact the organization. This email will receive course-related communications.
- (d) **Phone:** Provide the primary phone number used to contact the organization here.
- (e) **Active:** When this box is checked, the organization is visible to learners.
- (f) **Searchability:** When this box is checked, the organization will appear under the “Organization” filter in the course catalog. This can help users search for courses related to the organization.
- (g) **Group:** Click the [Select Group](#) link to choose your organization’s national, state, or federal affiliation.
- (h) Click the green **Save** button to save your selections.
- (i) Click the yellow **Cancel** button to exit the “Add Organization” page.

3

Manage Members

Once you’ve created an organization, you will see this details page:

>> To add members to the organization, click the **Manage Members** button.

>> Next, click the **Add Members** button.

Then, select (a) **Add Course Providers** or (b) **Add Course Report Managers** from the dropdown menu.

< Back

Organization Sample [0 courses](#)

Edit Settings

Short NameOS

Primary Email[sample@email.com](#)

GroupNational

ActiveTrue

Show this Organization in the "Organization" filter on the Course Catalog page

Members (0)

Manage Members

There are no members available

CancelSave

Organization Sample

Members (0)

Add Members

There are no members available

aAdd Course Providers

bAdd Course Report Managers

Add Course Providers

Search by Last Name, First Name, Login Name, Email, or User ID

c

d

Cancel

Add 0 Course Providers

e

>> To add a Course Provider, use the (c) text field to search for users by last name, first name, login name, email, or user ID. Click the (d) magnifying glass button to view search results. Select a user and click the (e) **Add Course Providers** button.

Add Course Report Managers

Search by Last Name, First Name, Login Name, Email, or User ID

f

g

Cancel

Add 0 Course Report Managers

h

>> To add a course report manager, use the (f) text field to search for users by last name, first name, login name, email, or user ID. Click the (g) magnifying glass button to view search results. Select a user and click the (h) **Add Course Report Managers** button.

Course Report Managers have the following reports available: **Abbreviated Course Roster**, **Assessment Results**, **Evaluation Results**, and **Evaluation Results (Raw Data)**.

 **TIP:** Members with Course Provider permissions can create courses, edit courses, and run course reports for courses within the organization.

 **TIP:** Course Report Managers can **only** report on courses associated with their Administrative Organization.

>> To change or remove member permissions, click the dropdown menu located to the right of the member name.

Add an Administrative Organization to a Course

4

Follow these steps to link an administrative organization to a course in TRAIN:

TIP: Another way to access courses is to click on the **Find & Edit Existing Content** button in the **Content** tile on the Admin home page.

- (a) Click the **Search** tab at the top of the screen.
- Search for a course and click on the course's title from the search results.
- (b)

- (c) Click the **Edit** button on the course details page and select the **Edit** option in the dropdown menu.
- (d) Click the **Organization and Sponsor** tab in the dashboard on the left side of the screen.
- (e) Click the **Add** button in the "Administrative organization" section.
- (f) Search for the administrative organization you want to add. Clicking on the Name of the organization will automatically add it to the course.

- (g) Click the green **Save** button to keep your changes.

Go to the **Admin** menu.

Click on the **Organizations** tile.

Then, click on the **Find & Edit organizations** tile.

Admin

Organizations

[Add organization](#)
[Find & edit organizations](#)

Find & edit organizations

Find/edit organizations, and modify their visibility and content.

TRAIN

ADMIN SEARCH USER SITE HELP

Object Type ▴

[Any Object Type](#)
Organization

Export

Sample

Q

Sort by relevance ▾

Show ▾

1 record(s) found.

Organization x

Organization Sample

Org ▾

- (a) Use the search bar to find the organization you want to edit.
- (b) Click the magnifying glass button to view your search results.
- (c) Click the name of the organization you want to view and/or edit.

TRAIN

ADMIN SEARCH USER SITE HELP

< Back

Organization Sample [0 courses](#)

Edit Settings

Short Name

OS

Primary Email

[sample@email.com](#)

Group

National

Active

True

Show this Organization in the "Organization" filter on the Course Catalog page

Members (1)

Manage Members

User: Example

Course Provider

- (d) Click the **Edit Settings** button to change details about your organization.
- (e) Update your organization settings here.
- (f) Click the green **Save** button to save your selections.
- (g) Click the yellow **Cancel** button to exit the "Edit Organization" page.

Cancel Delete

Edit Organization

Save

Name

Organization Sample

ID: 3495

Short Name

OS

Typically an acronym or shorthand of the organization name. This will be used in cases where space is limited.

Website

Website

Primary Email

sample@email.com

Phone

() - -

☒ Active

☒ Show this Organization in the "Organization" filter on the Course Catalog page

Created by

(Dec 18, 2023)

Updated by

(Dec 18, 2023)

Group: National

[Change Group](#)