

# Course Provider Organization Management

## Purpose:

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With the Course Provider Organization Management feature, TRAIN administrators can grant course-related privileges to course providers within a specific organization.

Course providers within an assigned organization can access, add, and edit courses associated with the same organization.

## Administrative Roles with Access:

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

## Table of Contents:

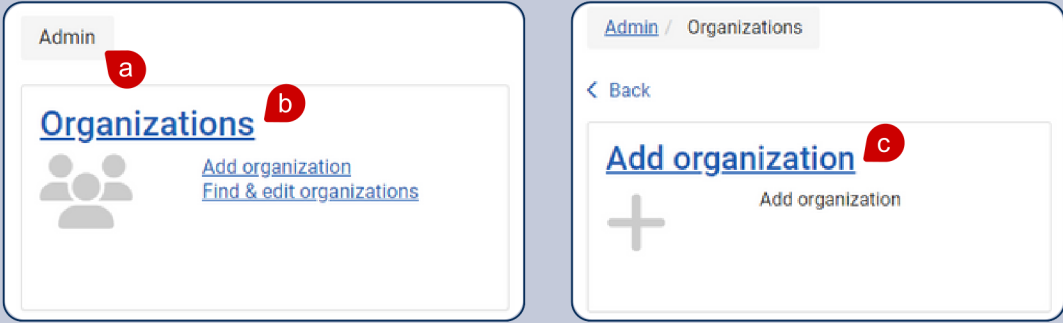
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1

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 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 the following 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.

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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 (0)

Manage Members

There are no members available

Cancel

Save

Organization Sample

Members (0)

Add Members

a

b

Add Course Providers

Add Course Report Managers

There are no members available

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

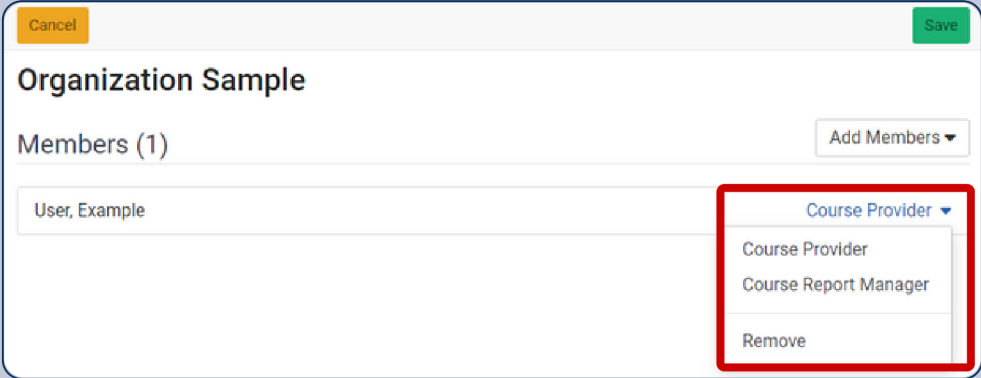
>> To add a course report manager, use the (f) text field to search for users by last name, first name, login name, email, or user ID. Click the (g) magnifying glass button to view search results. Select a user and click the (h) **Add Course Report Managers** button.

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.

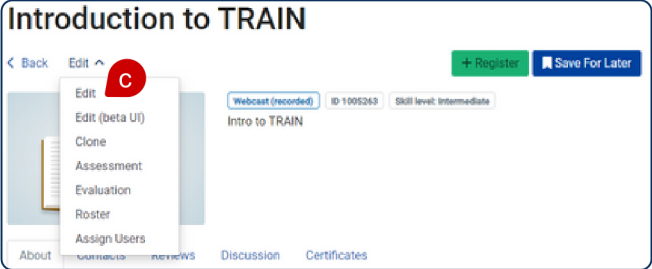
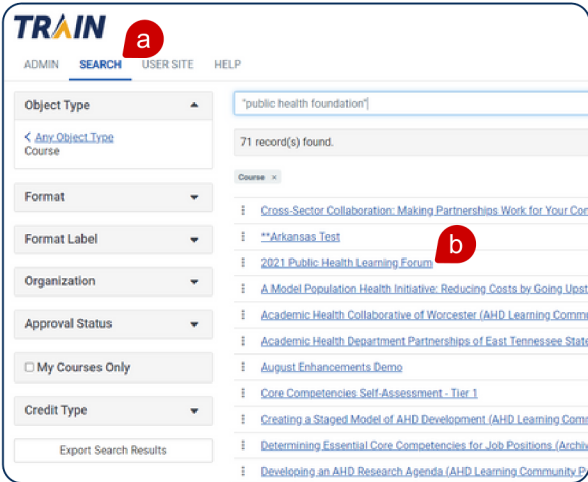


4 Link a Course Provider Organization to a Course

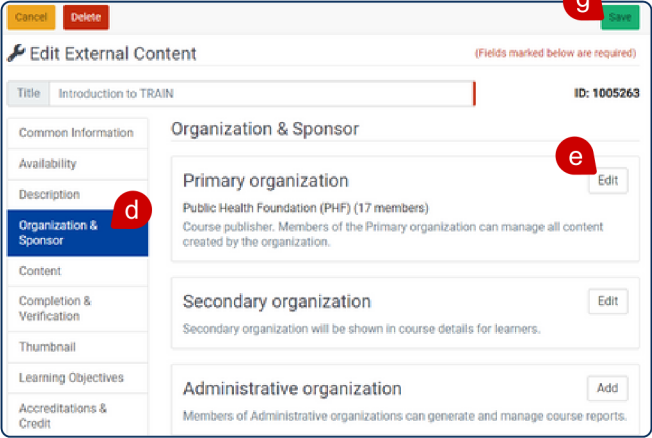
Follow these steps to link a course provider organization to a course in TRAIN:

 **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.
- (b) Search for a course and click on the course’s title from the search results.



- (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 **Edit** button in the “Primary organization” section.
- (f) Search for the course provider 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

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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   Save

Edit Organization

(Fields marked below are required)

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](#)