

# Administrative Organizations

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## Introduction

**Purpose:** The purpose of this job aid is to introduce Administrative Organizations. It includes images to illustrate key points.

The Administrative Organizations feature enables the granting of administrative privileges over individual courses to another organization. Administrators will be able to create a new Administrative Organization and assign either Course Report Manager or Course Provider role by managing the Organization's members. This Organization can be associated to courses as desired.

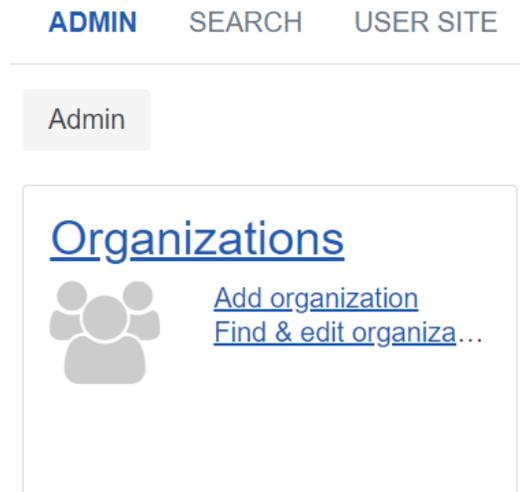
**Access: Administrators** will be able to assign the Course Report Manager and Course Provider role to individuals who have TRAIN accounts so that they can get access to specific course reports.

### Related Inclusions and Enhancements:

- Course Provider Organization fields have been renamed to Organization
- The search filter in the Certificates section of the Course Edit page allows for searching by Administrative Organization

# How to create an Administrative Organization

Creating an Administrative Organization is the same process as it is for other Organization types. In the Admin menu, choose Organizations and click on Add Organization to begin.



Enter the required information of Name and Primary Email. There are optional fields for short Organization name, website, and phone. There are two checkboxes to make the Organization active and display it in the Organization filter on the Course Catalog page. Save the selections when the Organization is complete.

The screenshot shows the 'Add Organization' form. At the top are 'Cancel' and 'Save' buttons. Below is the title 'Add Organization' and a note '(Fields marked below are required)'. The 'Name' field is highlighted with a red box and has a blue arrow pointing to it. Below the 'Name' field are fields for 'Short Name', 'Website', 'Primary Email', and 'Phone'. There are two checkboxes: 'Active' and 'Show this Organization in the 'Organization' filter on the Course Catalog page'. At the bottom, there is a 'Group' dropdown menu with 'All Groups' selected and a 'Select Group' link.

# How to add or manage members in Administrative Organizations

When a new organization is created, the list of members will be empty. Click on Manage Members to add members to the organization.

The screenshot shows the TRAIN administrative interface. At the top left is the TRAIN logo. Below it are navigation links: ADMIN, SEARCH, USER SITE, and HELP. A search icon is on the right. Below the navigation is a '< Back' link. The main heading is 'Testing 13026 ( Administrative Org) [0 courses](#)'. To the right of this heading is an 'Edit Settings' button. Below the heading is a table of organization details:

Short Name	Admin Org
Primary Email	<a href="mailto:abc@gmail.com">abc@gmail.com</a>
Group	National
Active	True

Below the table is the text: 'Show this Organization in the "Organization" filter on the Course Catalog page'. Underneath is a 'Members (0)' section. A red box highlights a 'Manage Members' button. Below this is a light blue bar with the text: 'There are no members available'.

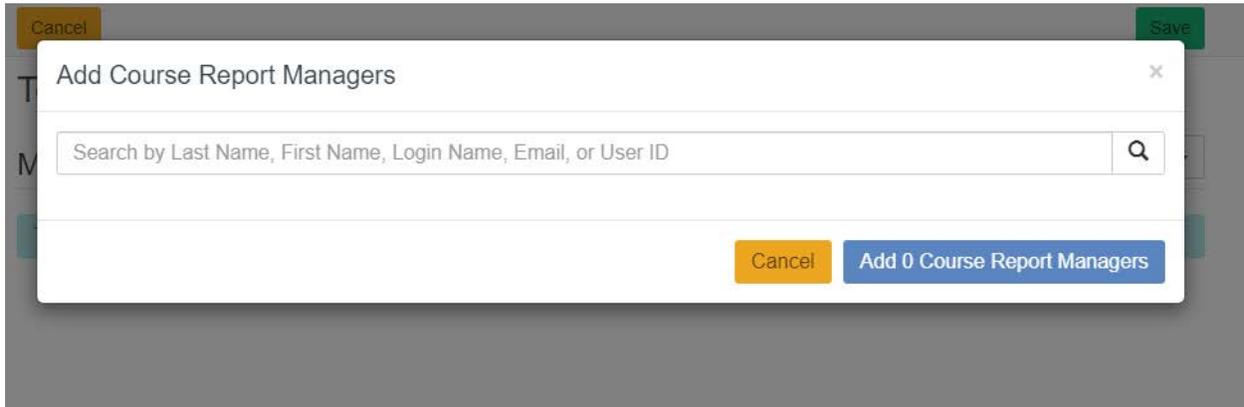
## Add Course Providers

Members with Course Provider permission will be able to create courses, edit courses within their organization, and run reports on those courses. Search by last name, first name, login name, email, or user ID to find a user and add as Course Provider.

The screenshot shows a modal dialog box titled 'Add Course Providers'. At the top left is a 'Cancel' button and at the top right is a 'Save' button. The dialog has a search bar with the placeholder text 'Search by Last Name, First Name, Login Name, Email, or User ID' and a search icon. At the bottom right of the dialog are two buttons: 'Cancel' and 'Add 0 Course Providers'.

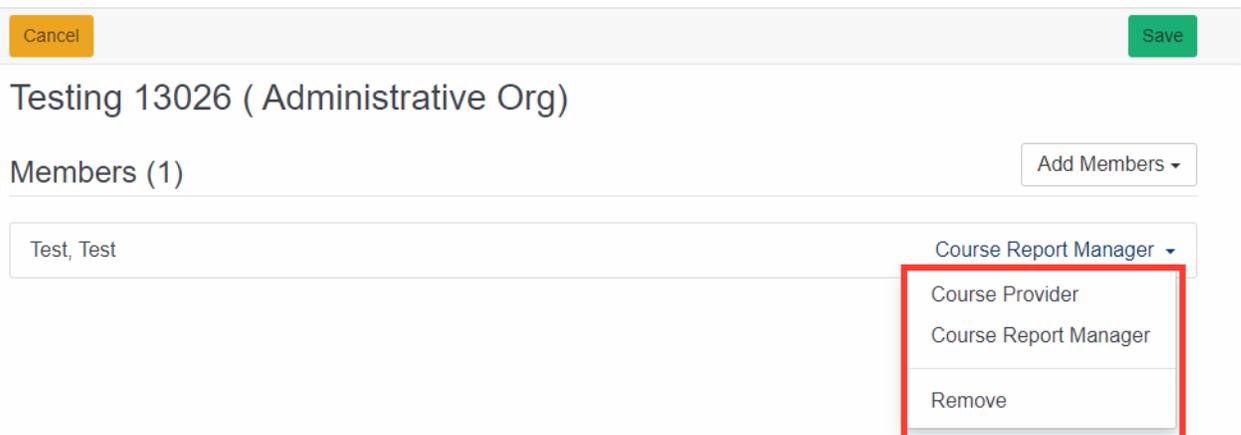
## Add Course Report Managers

Course Report Managers will only have access to certain reports and will only be able to report on courses associated with their Administrative Organization. Search by last name, first name, login name, email, or user ID to find user and add as Course Report Manager.



## Change/Remove Member Permission

Members can be changed from Course Provider to Course Report Manager and vice versa or removed entirely by using the dropdown next to the member name.



# How to add Administrative Organization to the course

Find Administrative Organization under the Organization and Sponsor section of the Course Edit page. Click on Select Organization to search and add the organization of choice.

The screenshot shows the 'Edit External Content' interface. At the top, there are 'Close', 'Delete', and 'Save' buttons. The title is 'Admin Org Test Course' and the ID is '1099625'. A sidebar on the left lists various sections, with 'Organization & Sponsor' selected. The main content area is titled 'Organization & Sponsor' and contains three sections: 'Organization' (Public Health Foundation (PHF) (11 members) with 'Change Organization' and 'Reset' links), 'Secondary Organization' (N/A with 'Select Organization' link), and 'Administrative Organization' (N/A with 'Select Organization' link). The 'Administrative Organization' section is highlighted with a red border. Below these are fields for 'Provider Course Number' and 'Sponsor/Offerer'.

The screenshot shows a modal dialog titled 'Select Administrative Organization'. It has a search bar with the placeholder text 'Search by organization name' and a search icon. A 'Cancel' button is visible at the bottom right. The dialog is overlaid on the 'Edit External Content' page, which is dimmed in the background.

## Reporting Access

When a course has an Administrative Organization, all members that are listed as Course Report Manager in that Organization will have the following reports available for that course.

- a. Abbreviated Course Roster
- b. Assessment Results
- c. Evaluation Results
- d. Evaluation Results (Raw Data)