

Course Provider Organization Management

Course Provider Organizations, or Organizations, allow Course Providers within the same Organization to access and edit all courses associated with that Organization. Let's take a closer look.

The Admin Page

▶ Access the Admin page from the TRAIN homepage by clicking the 'Admin' link. Here, you can manage Course Provider Organizations.

Course Provider Organizations

▶ Within the Course Provider Organizations feature, you can add course provider organization information or find and edit existing course provider organizations.

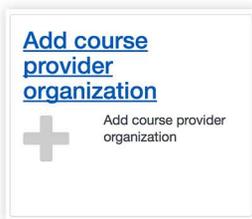


Course Provider Organizations

▶ When a Course Provider is added to an Organization, all of the courses that Course Provider creates are associated with the Organization, and anyone else within that Organization has access to edit those courses. If a Course Provider leaves an Organization, you simply remove them from the Course Provider Organization within TRAIN. Their courses will stay with the Organization, and the remaining Course Providers within the Organization will still have access to those courses to edit them as necessary. Only affiliate administrators with the Course Provider Organization Manager role have the ability to add and edit Course Provider Organizations. They also have the ability to move courses from one Organization to another within the course edit screen.

Add Course Provider Organization

▶ When you click the 'Add Course Provider Organization' link, you will be directed to the 'Organization Details' page.



1. Name

▶ Enter the name of the Organization that you are adding into the text field. Please note that the Organizations' name must be unique for all Course Provider Organizations within an affiliate group; so different affiliates can have the same named Organizations, but the names within the same affiliate must be unique. The organization name that you enter is learner facing, so please be sure to use a name that is recognizable to learners.

2. Short Name

▶ Now enter in a short name of the Organization. This is typically an acronym or shorthand of the organizations' name. This listing will be used in cases where space is limited. The short name that you enter is learner facing, so please be sure to use a name that is recognizable to learners.

3. Website

▶ If the Organization has a website, enter its URL address in the 'Website' text field.

4. Primary Email

▶ List the primary email of the Organization. This is typically an address that is used by the general public to contact the Organization.

5. Primary Phone

▶ Now enter the primary telephone number for the Organization.

6. Active Status

▶ Finally, leave the 'Active' box checked for the Organization to be visible to learners.

Now your organization can be assigned to a National, State or Federal affiliate group. Only one group can be assigned to the Organization. All users within this Organization will be given the Course Provider role within the selected group. First click the 'Select Group' button. For this example, we will enter the State of Rhode Island into the 'Search Group' text field, click the search icon to generate a search, and click the 'Add' icon next to the National/Rhode Island group listing to add our Course Provider Organization to this affiliate group.

Users with this Organization will have course provider roles in selected group

Search group

Search by any part of group name

Users with this Organization will have course provider roles in selected group

Search group

rhode island

National/Rhode Island

Once you have entered the Organization's information in the required text fields and assigned the appropriate affiliate group, click the 'Save' button in the upper right hand portion of the page to save your work. Once saved, you will be directed to the 'Organization Details' page for the organization you created. Here, you can edit information, deactivate the Organization, or add registered TRAIN users as Course Providers.

Find and Edit Course Provider Organizations

▶ When you click the 'Find and Edit Course Provider Organizations' link you will be directed to the course search page, listing all Course Provider Organizations available to you. Please note that you will only have access to Organizations within your affiliate group.

Find & edit course provider organizations

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

The screenshot shows the TRAIN search interface. At the top, there are navigation tabs: ADMIN, SEARCH (highlighted), USER SITE, and HELP. A search bar is on the right. Below the search bar, there are filters for Object Type (Any Object Type, Course Provider, Organization) and a search input field. The results show 5 records found, with a 'Show inactive' link. A list of organizations is displayed, including HEALTH, Public Health Foundation, Wyoming, Wyoming Department of Health, and Wyoming Department of Health Human Resources. Each entry has a pencil icon for editing and a dropdown menu with 'Org' selected.

You may filter your search results by selecting options within the 'Relevance' dropdown menu. Inactive Organization are hidden by default, but you can show them using the 'Show inactive' link found under the search box.

Course Provider Organization are listed in the center of the page. On the right side of each listing is a triangle icon that allows you to expand individual search results to view additional information such as an organizations' telephone number, website address, or email. Each listing contains a corresponding pencil icon on the left. Clicking the pencil icon allows you to go back and edit organization details or course provider information. Clicking on the Organization's name will bring you to the Organization's details page.

Organization Details: Edit Organization

▶ To edit an Organization's details, click the 'Edit' button. You will be directed to the 'Organization Details' page for your selected Organization. Simply click within your desired fields to make changes, and once you've completed your edits, click the 'Save' button. You may also delete an organization on this page by clicking the 'Delete' button.

The screenshot shows the 'Edit Course Provider Organization' page. At the top, there are 'Create' and 'Delete' buttons. The page title is 'Edit Course Provider Organization' with a note '(Fields marked below are required)'. The 'Organization Details' section includes fields for Name (Public Health Foundation), Short Name (PHF), Website (http://www.phf.org/Pages/default.aspx), Primary Email, and Primary Phone. There is an 'Active' checkbox and a table for 'Created' and 'Updated' dates. At the bottom, there is a section for 'Users with this Organization will have course provider roles in selected group' with a dropdown menu showing 'National' selected.

Organization Details Page: Edit Course Providers

▶ Back on the main 'Organization Details' page, you may also add registered TRAIN users as course providers by clicking the corresponding 'Edit' button. Please note that the 'Edit' button will appear for Course Providers only if a group has been selected for the Organization. On the 'Course Providers' page, enter any part of a registered TRAIN users' name in the text field, and click the magnifier icon or press "enter" to generate a search. Add the course provider to the Organization using the 'Add' button to the left of their name. Once added, you will see the list of Course Providers under 'Selected Users.' You can remove any Course Provider using the 'X' button to the left of their name.

Close Delete Save

Edit Course Provider Organization (Fields marked below are required)

Public Health Foundation

Course Providers

Selected Users

- Foundation, Public Health

Add User

Search by any part of user name

Please note that:

- You can assign users that are in the same group (or below) as the Organization.
- You can assign users that are not assigned to any other Organization.
- In the new TRAIN platform, a Course Provider must be assigned to an Organization in order to have Course Provider privileges.
- When a user is removed as a Course Provider from the Organization, their 'Course Provider' role will be removed from the user's list of roles.

Organization Details Page: Course Providers and Courses

▶ (1). When you click on a Course Provider's name, you will be directed to the course search page, listing all courses created by the selected Course Provider.

(2). When you click the 'Courses' link, you will be directed to the course search page, showing all courses associated with the selected Organization.

Classic TRAIN Public Health

TRAIN

ADMIN SEARCH USER SITE HELP

Public Health Foundation Organization

ID: 3

Organization Details

Short Name: PHF
Website URL: <https://www.train.org>
Primary Email: training@phf.org
Primary Phone: 2022184420
Active

Groups

National

Course Providers (5)

- Bougie, Erin
- Draper, Samantha
- Gabriel, Stephen
- Plotkin, Ilya
- Foundation, Public Health

1 [Courses \(20\)](#)

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