Administrator LMS FAQs

To access other users' accounts within your group or to run reports, you will need to have administrative rights for your group. If you have not received these rights, please email CriticalPoint at moreinfo@trchealthcare.com or call 973-256-6500.

Can administers assign courses to employees?

The enrollments are set up on a group level, limiting the ability to adjust individual enrollments. If you need to customize your group's current enrollments, please email CriticalPoint at moreinfo@trchealthcare.com.

How do I view my users' certificates?

From your home screen, click on the Administrator Menu tab which is located on the top toolbar of your screen. On the next screen, click on the Users icon and search for your user. To view the individual user, click on their name. Once you are in your user's profile, click on the Certificates tab. This tab will display any certificates your user has received. From this page, you can view or print the certificate.

Why am I receiving an error message when editing or disabling a user's account?

If you receive an error message when saving the changes, you will scroll down the profile page to find where the error is occurring. Most likely, the profile is missing required information. It will be identified with a red box around the missing information. Please correct this error and then click on the Save button.

How do I edit user accounts?

To begin the process, please login using your username and password. From your home screen, click on the Administrator Menu tab which is located on the top toolbar of your screen. On the next screen, click on the Users icon and search for your user. To edit the individual users, click on their name. Once in the individual user's profile, you can make changes to his/her account under the Profile tab.

The Stats tab – will give you a quick overview of the eLearning statistics for that user.

The Profile tab – allows you to change any person's information for this user. You can also change their password and disable users who are no longer employed at your facility. We do not encourage you to request users be deleted as you will lose all their historical data once an account is deleted.

If you make any changes to the information, make sure that you click on the Save Changes tab at the bottom of the page.

If you receive an error message when saving the changes, there is required information that is missing. This information will be identified with a red box around the location of the error. Please correct this error and re-enter the data changes and then click on the Save button.

<u>Groups tab</u> – shows you the group your user is under.

<u>Certificates</u> – shows what certificates your user has been awarded.

How do I run a report for my group?

Please login by clicking on the Log In icon in the top right-hand corner and enter your Username and Password.

From your home screen, click on the Reports tab which is located on the toolbar on the top of your screen. This will take you into the Reporting feature of CriticalPoint. On this page, you will see several options for running a report.

- <u>My Saved Reports</u> – These are reports that you have configured and saved.
- <u>My Subscriptions</u> – These are reports that you have saved and set up as subscriptions which will allow them to be sent to your email directly based on your requirements.
- <u>Public Reports</u> – These are standard template reports that have been created and made public by CriticalPoint. Because many of our customers run the same reports, we created several of the frequently used reports under this tab. In addition, these standard reports can be customized for your facility and saved under My Saved Reports
- <u>Certificates</u> – Reports on Certificates awarded to your users.
- <u>Course Transcripts</u> – Reports on Courses and Lesson status, as well as completion information including scores and dates.
- <u>User Demographics</u> – Reports on user account information including name, username, email, contact information, organizational information and more.

To run a particular report, click on the name of the Report. Once you are in the report, you can add fields and filters that you would like to appear in your report. To add filters and narrow down the data in your report, click on the drop-down box to the right of the green plus sign. Pick the criteria that you would like to filter then click on the Green Plus Sign and fill in the necessary information.

Before you publish your report, you must select which fields you would like to appear on your report. This is done by selecting a field(s) from the box on the left-hand side of the screen. The saved reports already have fields selected but you can add more or remove fields depending on your needs. For most reports, it is helpful to select "all fields" to assure that you get the information you need. If you do this, you may want to add a Name filter and put your name in as the only match so that you do not have too much data to review the first time.

Once you have configured the report to your specifics, click the Run Report tab. A separate window will pop up and indicate that your report is being generated. Once the report has been generated, you will have the option to view it on screen by clicking on the HTML icon or you can download and open it in Excel (.csv) by right clicking on the icon and choosing the Save/Download file option. You can also save the file to view it later by clicking on the Save icon. This option saves the report to your LMS account.

Depending on how much information is in the report, this process may take several seconds to a few minutes to complete. Once you are finished with your report, close the pop-up window by clicking on the "X" in the top right-hand corner.

How do I log in as my user?

If you would like to log in as your user so you can see exactly what they see, log into your account, and click on the Administrator Menu tab. Then search for your user. You can click into their account by clicking on their name and clicking on the icon that looks like a blue book or you can log in directly from the Users page by clicking on that same icon (located under Options). This will log you into their account. If you are unable to click on the icon or there is a green dot by their name that means the user is currently logged in.
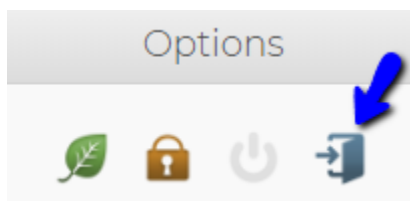
Why do I no longer see a list of all my users?

When you click on the Administrator Menu and then Users, you no longer see a list of all the users under your group. This change was made to reduce the page loading times on the Users screen and to help the system run more efficiently. You will need to Search for your user. You can always run a Report of all your users if you need to see everyone under your group.
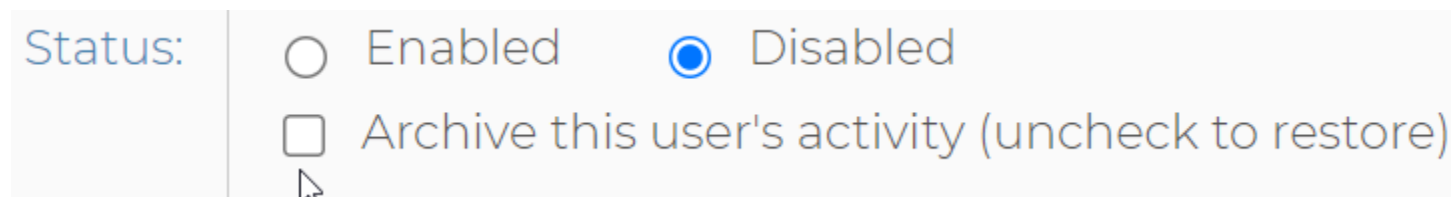
Sample Reports

Below are several, high-level examples of the report capability within the LMS. There are many different fields/filters the individual facilities can pick to run specific reports with specific information. Links for the following examples of these reports can be found on the main FAQ page under "Sample Reports".

- Sample Lesson Completion Status
- Sample Facility Report
- Sample Post Test Completion Report
- Sample Course Status Report

How do I disable a user?

From your home screen, click on the Administrator Menu tab which is located on the top toolbar of your screen. On the next screen, click on the Users icon and search for your user. To edit the individual users, click on their name. Once in the individual user's profile, click on Profile and then select Disabled under Status (about halfway down the page). Then click save. If you receive an error message when saving the changes, most likely, the profile is missing required information. It will be identified with a red box around the missing information. Please correct this error and then click on the Save button.

Administrators will now have the option to archive user data when a user is disabled. By archiving the data, the user's transcript will not be viewable.

Status: ○ Enabled   ● Disabled
          ☐ Archive this user's activity (uncheck to restore)

If you archive data and decide you would like to be able to view the user's transcript, you can check the box at any time. Please note, the system will process this request at 1:00 AM EST so you will not see the information until the next day.

How do I add a new user?

Administrators do not have the ability to create users outside of registering through the main page. The reason for this is because users are required to enter their eProfile number and birth MM/DD information to ensure CEs crossover to the CPE Monitor. This also allows for users to create usernames and passwords they will remember.

Additional step-by-step instructions for reports (pdfs)

*Please note that these instructions have not been updated to the new upgraded LMS however, the steps should still be the same. We are currently in the process of updating them. If you have questions in the meantime, please contact moreinfo@trchealthcare.com. Links to the following examples of these reports can be found on the main FAQ page under "Additional Step By Step Instructions for reports.

- Configuring a Report
- Definitions: Filters and Fields

- Examples: How to Configure and Run a Report
- Navigating the Reports Screen
- Running a Report
- Saving your Report Configuration
- Saving your Report Results
- Subscribing to a Report

How do I reset my user's account password?

You can reset your user's password but click on Administrator Menu and then Users. Search for your user from your list of users or by searching their last name. Once you have found your user, click on their name, and then click on Profile. Under Profile, you can enter the New Password. You can also choose to force your user to change their password at the next login but clicking on the box under Password. Click Save Changes at the bottom of the page.

How do I set up a subscription for my report?

Once you have your report configured how you want it (under **Reports**), **Name** your report, and click the **Save Changes** tab. Make sure the Privacy Setting is set to "Private" and then click Save Changes. Once it has been saved, you will see the **Subscribe** tab appear on the right-hand side. Click on this tab and select "On." Then select the date that you would like to start the delivery of the report as well as the frequency. Click "Update Subscription" to save your subscription.

How do I change the enrollments for a user?

The enrollments are set up on a group level, limiting the ability to adjust individual enrollments. If you need to customize your group's current enrollments, please email CriticalPoint at moreinfo@trchealthcare.com.