CPDOnline

Getting Started: Administrator Mode

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CUNA
Credit Union National Association

Contents

Introduction to Administrator Mode

CPDOnline is a Web-based application that provides you with the tools necessary for managing training activities and tracking professional skills and growth. Through CPDOnline, your credit union can provide access to online learning courses, build performance assessments, and provide access to materials such as documents.

Administrator mode is available in CPDOnline to users with an appropriate security role. A security role is assigned to each user account to specify what the user can and cannot do when logged in to the system. The tasks you can accomplish in Administrator mode are based on the permissions assigned to your security role.

Objectives for This Guide

In this document, you will learn how to use CPDOnline for creating and managing objects stored in the system. You will not learn everything about CPDOnline–just enough to get comfortable navigating and exploring some of the key features and capabilities.

Logging on to CPDOnline

The first time you access the Log On page, the system will ask you to enter the username and password that have been assigned to you.

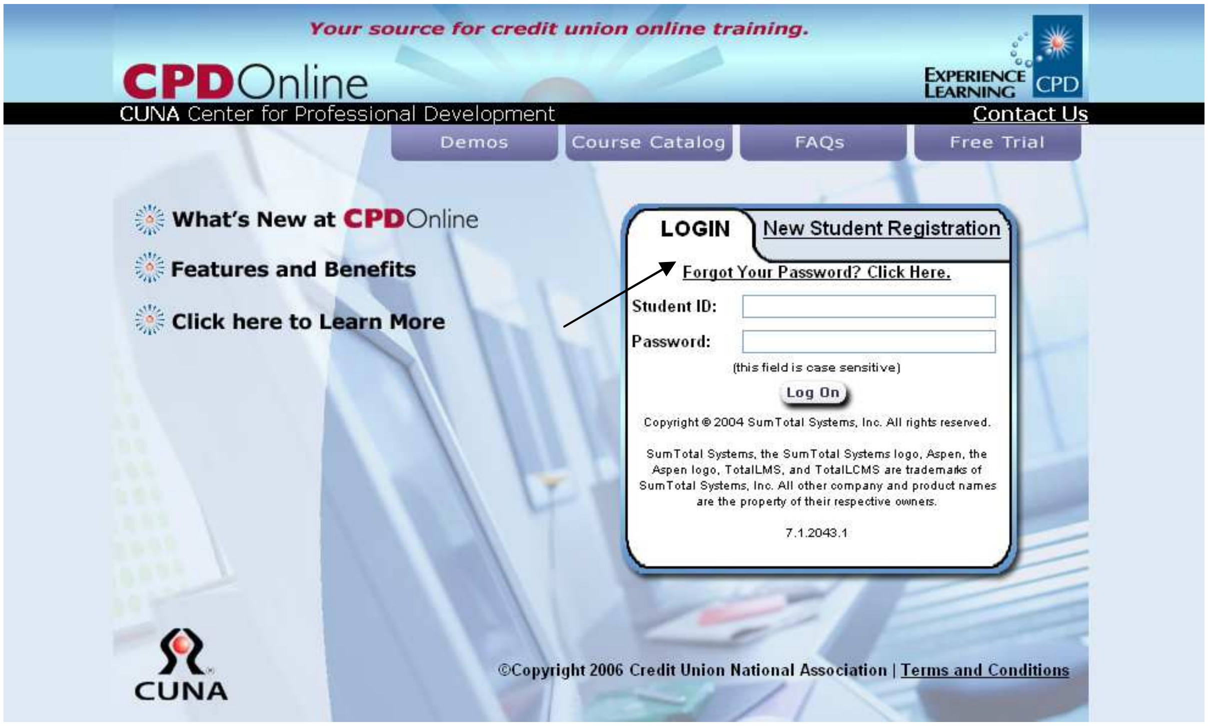


Figure 1: Login page

The password can be changed after you have successfully logged in to the system. If you forget your password, click on the link **Forgot your Password? Click Here**.

About User Modes

Depending on your role in CPDOnline (manager, employee, and so forth) you may be able to access pages that appear in different modes. Each mode provides features for specific roles, such as the ability to publish training to the system or to manage employee information. If you have permission to access features in more than one mode, you can switch between these modes by choosing one of the mode buttons at the top of each CPDOnline page. All of the modes are described below.

Mode name	Icon
Learner mode: Provides access to the training material and skills data that is assigned to you. All CPDOnline LMS users can access this mode.	
Manager mode: Provides information about training and performance management for the users a manager is allowed to view. Reports are available for individuals and workgroups.	
Report Manager: Allows administrators to process existing reports or create their own using this report query tool. All results can be presented in a variety of formats and can be exported to Excel.	
Administrator mode: Allows users to create, manage, and configure all components that are tracked by CPDOnline. Employees with permissions to publish training to the site use the Administrator mode to make this training available.	

About the Search Feature

You can enter words in the Search text box available on any page or select from multiple search criteria using the Advanced button. When you enter search items, these rules apply:

- Searches are not case sensitive.
- Exact matches for the word or words you enter in the Search box will appear in the search results.
- If you use a space between words in the Search box, the results will include all records that contain both search words.
- You can use an asterisk (*) as a wildcard character to substitute for zero or more characters.
- Punctuation marks and common short words (or "noise" words) are ignored when used as search criteria. Examples of common short include "and", "or", "the", "as", "after", and "much".

The following table shows some examples of searches including sample results.

Search using...	Example of search text	Search results
A single word	Register	Returns all records that contain the word register. Does not return records that contain variations of this word, such as registering.
Multiple words	Class List	Returns all records that contain both "class" and "list" in any order or position. Does not return records that contain only one of these words or variations of the words. An example of a search result could be "The resource **list** for the Finance Fundamentals **class**".

A phrase in quotes	"Class Registration"	Returns all records that contain this exact phrase in the searched content. An example of a search result could be "The Accounting II class registration will be held on January 5".
Single search word with an asterisk wildcard character	class*	Returns all records that contain terms that begin with "class" such as **class**room or **class**es.
Multiple search words with wildcard characters	class* acc*	Returns all records that contain both the terms that begin with "class" and "acc". Examples of results: "**Acc**ident Reporting **Class**es" and "The available **class**rooms for **Acc**ounting".

Updating user profile

You may edit user profiles for those within your credit union. This allows you to update items such as student name, manager and training approver connections, e-mail, etc.

To update a user's profile:

1. In Administrator mode, go to Manage > Users.
2. Search for user. Once found, click to edit.
3. Edit necessary details and Click OK.

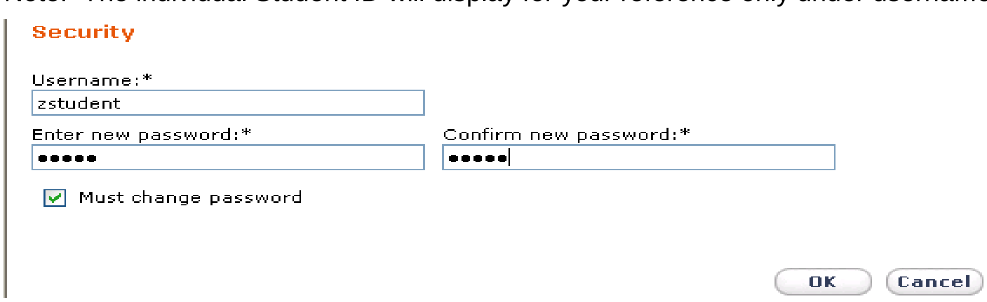
Administrator ability to change Student password

Administrators may now change student passwords. Students are encouraged to use the **Forgot Your Password?** link on the login page to update their own passwords or they may contact CUNA, though you now have the same ability when time is a concern.

To update a password:

1. In Administrator mode, go to Manage > Users.
2. Search for user. Once found, click to edit.
3. Enter the new password in both Enter new password and Confirm new password boxes.
4. Click "Must change password" if you want to force the student to update their password when they login (for security purposes, we encourage you to force this change to ensure the student password is private).
5. Click OK to change new password.

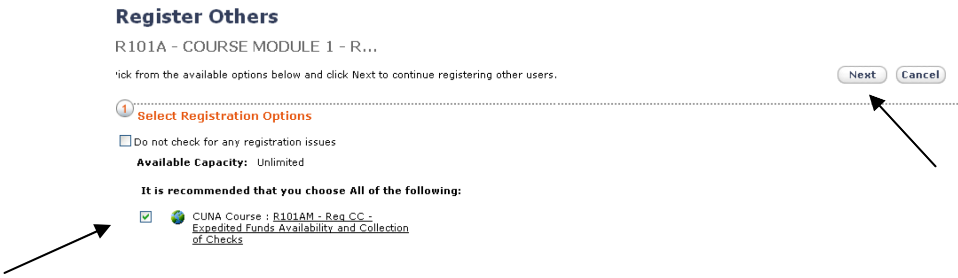
Note: The individual Student ID will display for your reference only under username.



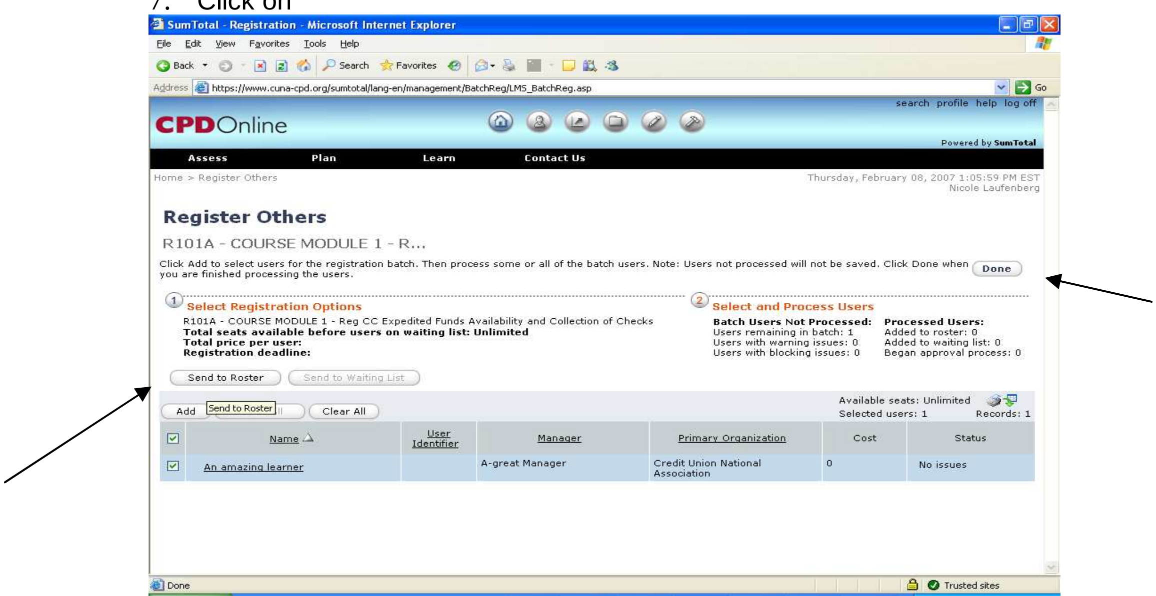
Registering others for Courses/Exams

To register others for a course or exam:

1. From the catalog, choose the desired course/exam and click on Register Others.
2. Select the recommended course or exam and click on Next.



3. Click on Add to select users for the registration batch.
4. Leave the default to select viewable users and click on Next.
5. Place a checkmark next to the desired users whom you would like to register for this activity (you may also select the box to the left of the Name column heading to select all). And click on OK.
6. When all users have been added, click on the box to the left of the Name column to select all and click on Send to Roster.
7. Click on Done



Temporarily suspend access to user accounts

Each user account has a property called Active. On the User Properties page, the Active check box is checked if the user is an active employee. Users who are inactive are not shown in lists of employees or search results (except when searching for inactive users). An inactive user is automatically canceled from learning activities. If an individual has left the credit union, please contact CUNA at CPDOnline@cuna.coop, so that they may be permanently disconnected from the credit union.

To make one or more user accounts inactive:

1. From the **Manage** menu, select **Users**.
2. On the Users page, select the check box to the left of each user account that you want to be inactive.
3. In the Task list, select **Inactivate Users**.
4. Click GO.

Creating Credit Union Reported Learning Activities

This feature allows you to create a learning activity and post to one or many student transcripts. Note that only the owner/creator of each learning activity has the ability to modify/edit the activity after it has been posted to transcripts. If multiple individuals within your credit union will share this responsibility, we recommend creating a generic Credit Union Administrator Student ID/Password for all to use when adding these activities. Please contact CUNA at CPDOnline@cuna.coop if you would a generic administrator record created for your credit union.

To create a new learning activity:

1. From the **Learn** menu choose **Learning Activities**.
2. Click Create: **Credit Union Report Learning Activity**.
3. Enter a name for the activity (required).
4. Create a Code for the activity (optional).
5. Enter a description (optional).
6. Enter any other additional optional information that you want to define. Note that Start and End Date will appear on transcripts.
7. Click OK to save learning activity details. To connect this learning activity to individuals, see **Adding users to an activity roster**.

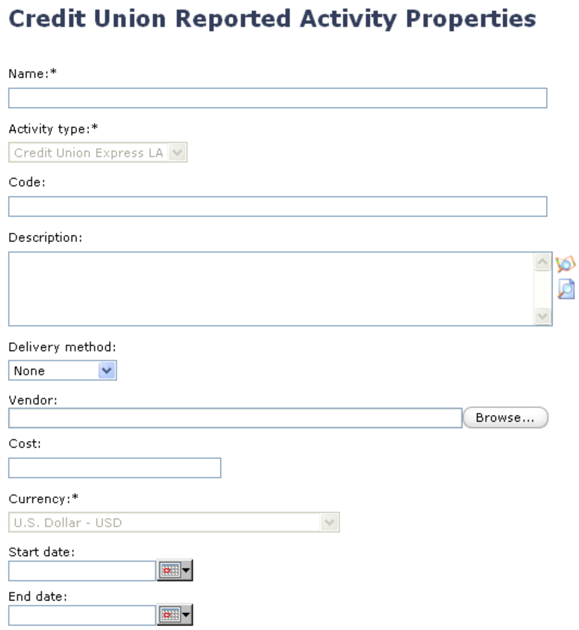


Figure 2: Credit Union Report Activity Properties

Adding users to an activity roster

An activity roster is a list of the users who have registered for or complete a particular learning activity.

To add a user or multiple users to an activity roster:

1. From the **Learn** menu, choose **Learning Activities**.
2. Locate the learning activity you want, then click the **Manage Roster** icon.
3. Click Add. Select one to many users to register for this activity.
4. Select the user and click OK. To complete these activities and post to transcripts, see **Marking a user's activity completion status**.

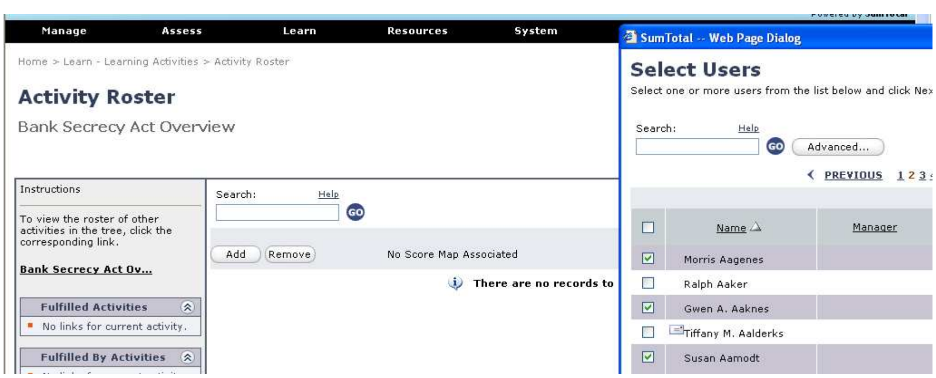


Figure 3: Activity Roster Select Users Screen

Marking a user's activity completion status

You can set the completion status for a user's participation in a learning activity to Yes or No, indicate whether they passed or failed, add a score if applicable and apply an attended status.

To enter or modify a user's completion status for a learning activity:

1. From the **Learn** menu, choose **Learning Activities**.

2. Locate the learning activity you want, then click the **Manage Roster** icon.
3. Select the check box to the left of the name of the user with the status setting you want to change.
4. In the Completed drop-down list, choose **Yes** or **No**.
5. In the Passed drop-down list, choose **Yes** or **No**.
6. If applicable, add a Score. Note that this will appear on transcripts.
7. Change Status to **Attended**.
8. Click OK.

Note: Via the Manager Roster screen, you can add additional individuals to this activity or remove those that did not attend or were incorrectly added.

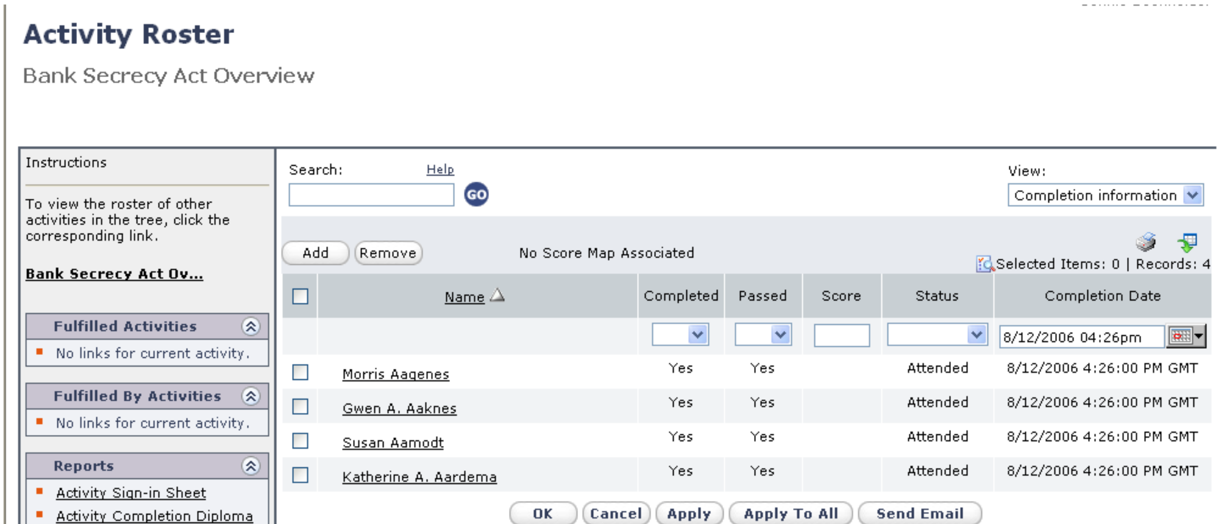


Figure 4: Activity Roster after completion status is saved

Processing Credit Union Global Transcript

This report allows you to generate a full transcript for your credit union over a specified period of time. If you need a report outside of the allowable date range, please contact us at CPDOnline@cuna.coop and we will provide this data to you.

To process the Global Transcript Report:

1. In Administrator mode, select Learn > Global Transcript Report
2. Select the Curriculum you wish to report on
3. Select courses and/or certificates (check one or both boxes)
4. Select print-based course completions or online course completions (click one or both boxes)
5. Click ‘Include Credit Union Reported Learning Activities’ if you want to include outside activity that you have entered to a student’s transcript.
6. Date range: defaults to 30 days prior to today.
7. All reports default to past 30 days, unless otherwise specified.
8. If you need a report outside of the allowable date range, please contact CUNA CPD at CPDOnline@cuna.com.

Working with Competency Assessments

A competency assessment is a type of online survey created by someone in your company. It may measure how well an individual understands concepts and utilizes acquired skills. Competency assessments can be used to:

- Analyze employee skills and competencies
- Assist with employee reviews
- Survey employee satisfaction
- Conduct 360-degree reviews
- Generate needs assessments
- Assist with planning for the future

Individual users can view performance ratings, see how their performance compares to others in the organization, and use this information to create development goals. Managers can compare individual ratings to the goals of the organization and identify any gaps in necessary skills.

The information below will provide you general direction on competency assessments. For more instructions, go to CPDOnline's Help and search for Completing a competency assessment.

Creating a New Competency Assessment

You can create a competency assessment to evaluate specific employees or gather information.

To create a new competency assessment:

1. Click on the Learner Mode Icon .
2. From the Assess menu, click **Competency Assessment Manager**.
3. Under the Tools section, click Create a new assessment Complete the required information.
4. Click OK. The page reappears with a menu bar across the top of the page.
5. Choose one of the following links to add or modify components of the competency assessment:

- Skills and Competencies - specify skills or a competency (a group of skills)
- Survey Questions - create and modify questions in the assessment
- Targets - define the users who will be evaluated
- Raters - specify the users who are assigned a competency assessment to complete
- Security - assign properties for rating and viewing reports

For more detail on how to choose the items from #5 above, go to CPDOnline's Help and search for competency assessments.

Building a Competency Assessment

After you create and design a competency assessment, you are ready to build it. During the build phase the assessment is prepared for deployment by the system. After a build is complete, you are still able to edit the design before the assessment is deployed. If you do make changes, you will need to rebuild the assessment before it is deployed.

To build a competency assessment:

1. From the **Assess** menu, click **Competency Assessment Manager**.
2. In the Assessment List, click Build next to the title of the assessment you want to build.
3. Click Build It .

Deploying a competency assessment

When a competency assessment is deployed, it becomes visible to the people who are going to complete the assessment (the raters). Any rater will see the competency assessment in a list of pending assessments. Raters and managers cannot view an assessment before the launch date or after the due date.

To deploy an assessment after it is built:

4. From the Assess menu, click **Competency Assessment Manager**.
5. Locate the assessment in the list and click Deploy .

Note: After deploying an assessment, you have the option to cancel the deployment before it is closed. To do this, follow the first step above and click Cancel .

Closing a competency assessment

After an assessment has been deployed and people have had time to complete the assessment, you must close the competency assessment before the results can be viewed or analyzed. Once the assessment is closed, no additional ratings can be submitted and the assessment cannot be reopened.

To close a competency assessment:

1. From the **Assess** menu, click **Competency Assessment Manager**.
2. Locate the assessment to close.
3. Click Close It .

About Assessment Reports

After a competency assessment is deployed and participants have submitted their responses, the assessment owner closes the assessment. When an assessment is closed, users can generate reports about the assessment if they:

- have sufficient security privileges.
- manage the target as one of their direct reports.
- have submitted an assessment for any target.

If you or the individuals you manage are assigned as targets of a competency assessment, you can generate reports from the list of completed assessments available on the Competency Assessments page.

If you are the assessment owner, you can generate and manage reports from the list of assessments on the Competency Assessment Manager page. For more information on assessment reports, go to CPDOnline's online Help and search for competency assessments.

Cloning a Competency Assessment

You can make a copy of an existing competency assessment by clicking the clone option. A cloned assessment contains most of the original assessment design, including general information, selected skills, selected targets, selected raters, survey questions, and security settings.

To clone a competency assessment:

1. From the **Assess** menu, click **Competency Assessment Manager**.
2. In the Tools section, click this link: Clone assessments owned by others .
3. Click GO to view all of the assessments.
4. [Optional] To narrow the list of titles, type in the first letter of the assessment name in the Search box, select the "begins with" option and then click GO .
5. Locate the assessment you would like to copy and select the adjacent check box.
6. Click Clone .
7. Confirm your selection and click Make a Clone .

Exploring Online Help

Online help has detailed information about the tasks you can complete in Administrator mode. Click the help link at the top of the any page in Administrator mode to access these topics. Tasks that are accomplished in Learner mode are explained in the help topics that appear when you click help link in Learner mode.