RedVector

Leaders in Online Education & Training

VICTOR

MANAGER'S USER GUIDE

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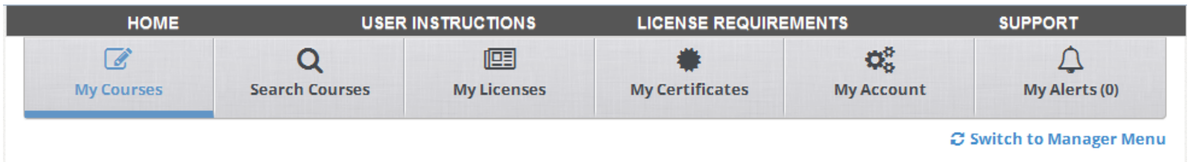
LOGGING IN

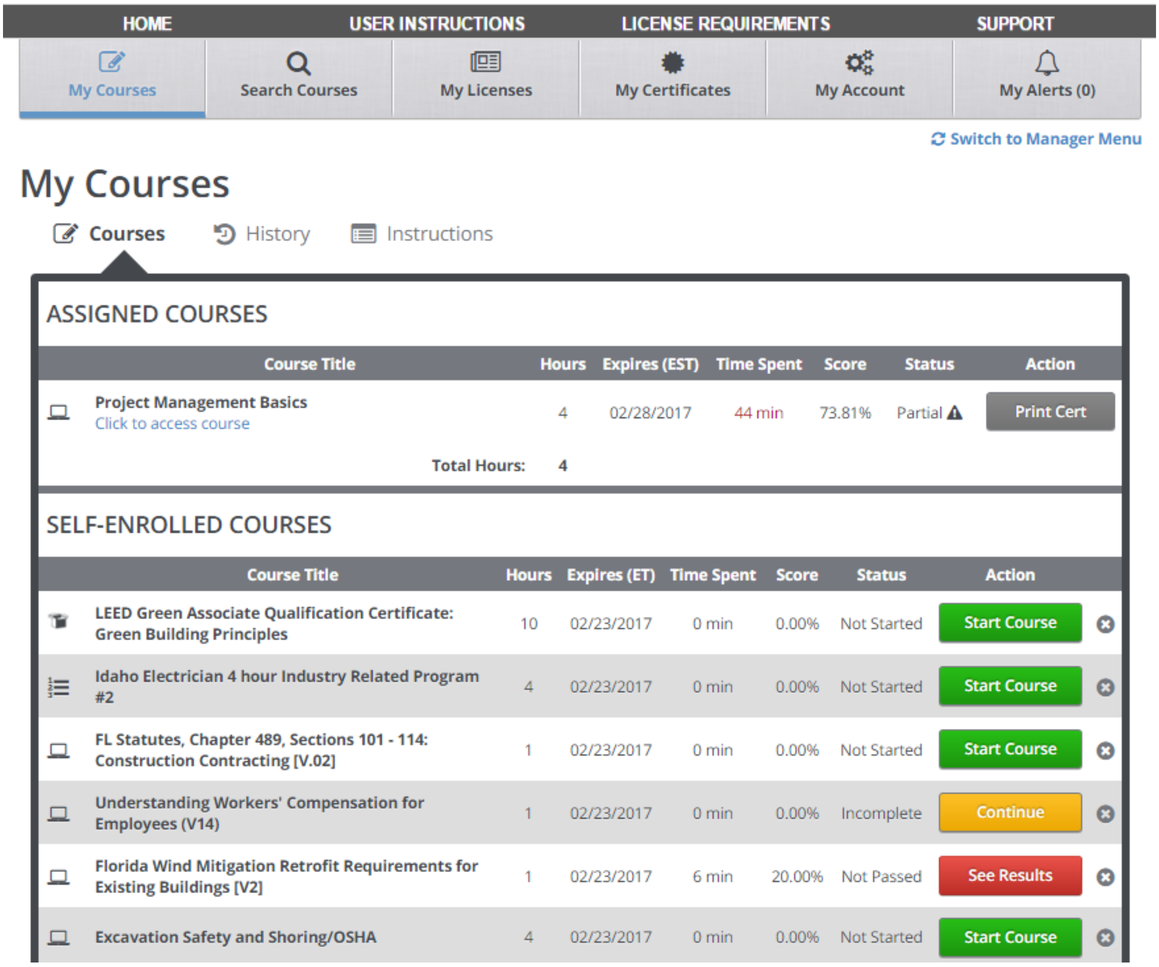
- To log in for AEC clients, go to https://aec.redvector.com and enter your Login /Username and Password.
- To log in for Industrial clients, go to https://industrial.redvector.com and enter your Login /Username and Password.
- If you have forgotten your password, click on the *Forgot your password* link.
    1. Enter the primary email address that is associated to your account then click on the submit button.

WELCOME TAB



- My Courses: Displays courses the user has *self-enrolled* in as well as courses that have been *assigned* to the user when available.
- Search Courses: Displays all of the courses in the specific organizations' catalog.
- My Certificates: Displays all Certificates of Completion that are available to be printed or emailed as well as all transcript records.
- My Account: Displays the users' profile information.
- My Alerts: Displays any *alerts* that the user has elected to receive.

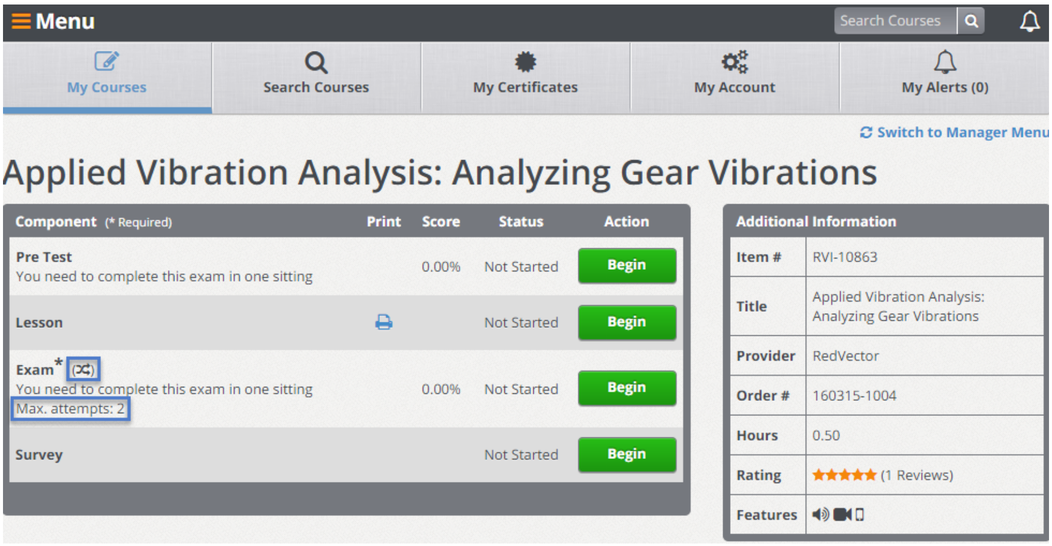
My Courses



The *My Courses* page is the first page displayed for all users upon successful log in.

- **Assigned Courses**: Users will only see Assigned Courses when available. This section lists the courses that have been assigned to the user. The user must *accept* an assignment before they can begin.
    1. To *accept* an assignment the user can click on either the *accept* button or the course title.
- **Self-Enrolled Courses**: This section lists the courses that the user has enrolled themselves in.
- To begin a course, click on the *Start Course* button or click on the Course Title.

Navigating a course



- Most *courses* are made up of four components: Pre Test, Lesson, Exam and Survey.
- Click on the *Begin* button to begin the Pre Test.
    1. Answer the questions by selecting the correct answer(s) then click on the arrow pointing to the right to be taken to the next question. To go back to a previous question, click on the arrow pointing to the left. You can also go back to questions by selecting the question number below the Previous/Next page arrows.
    2. When all the questions have been answered, click on the *Grade Exam* button
    3. The user is able to *Save & Exit* the Pre Test, they will be able to save their progress in the case they are not able to complete the Pre Test in one sitting. When they are ready to complete the Pre Test, simply click on the *Continue* button.
    4. If your account has the 'View Exam History' setting turned on, once a Pre Test or Exam has been completed a link will be displayed under the component name. Click on the *View Exam History* link to see which questions were answered correctly and incorrectly.
- Click on the *Begin* button to begin the Lesson.

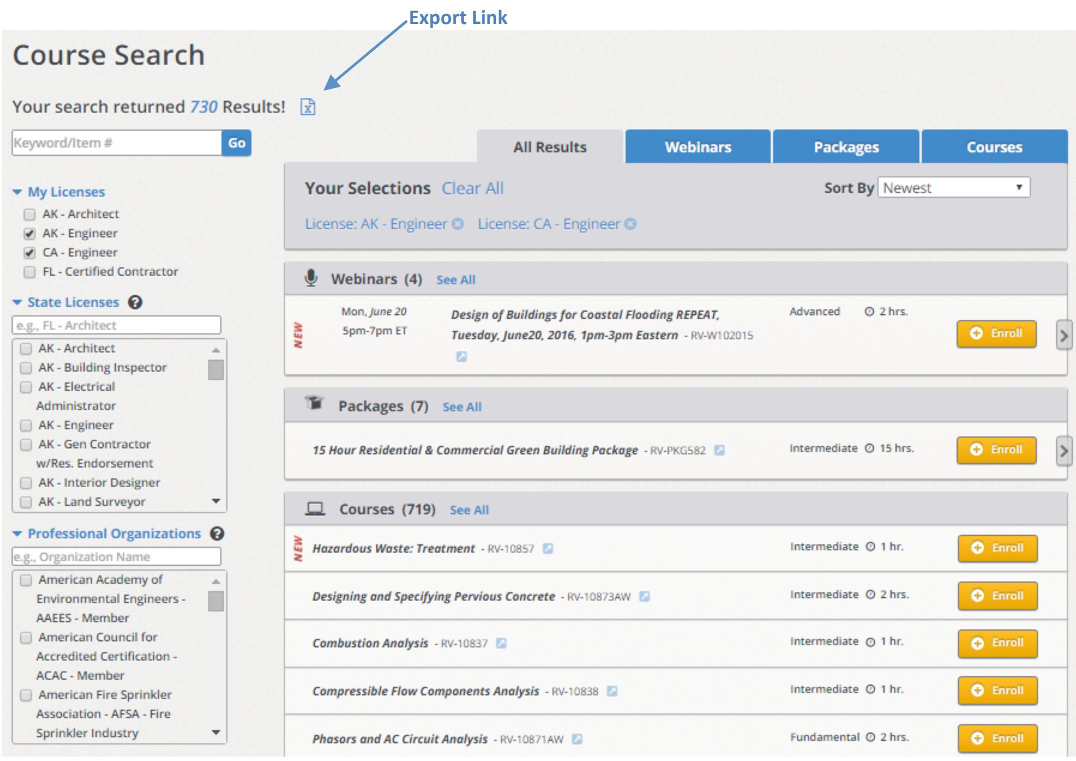
1. Click on the printer icon to display and/or print the accompanying written materials. (Not all lessons have accompanying written materials)
2. You must view every page of the lesson in order for it to be marked complete and be able to proceed to the exam.
3. After the lesson has been completed once, you can go back through the lesson by clicking on the *review* button.

- Click on the *Begin* button to begin the Exam – Note: some exams have randomized questions and/or a set maximum attempt setting, student will have to contact internal administrator or Account Manager for assistance if failed.

1. Answer the questions by selecting the correct answer(s) then click on the arrow pointing to the right to be taken to the next question. To go back to the previous question, click on the arrow pointing to the left. You can also go back to questions by selecting the question number below the Previous/Next page arrows.
2. When you have answered all of the questions, click on the *Grade Exam* button
3. The user is able to *Save & Exit* the Exam, the user will be able to *Save & Exit* to save their progress in the case they are not able to complete the Exam in one sitting. When they are ready to complete the Exam, simply click on the *Continue* button.
4. If your account has the 'View Exam History' setting turned on, once a Pre Test or Exam has been completed a link will be displayed under the component name. Click on the *View Exam History* link to see which questions were answered correctly and incorrectly.

- Click on the *Begin* button to begin the survey

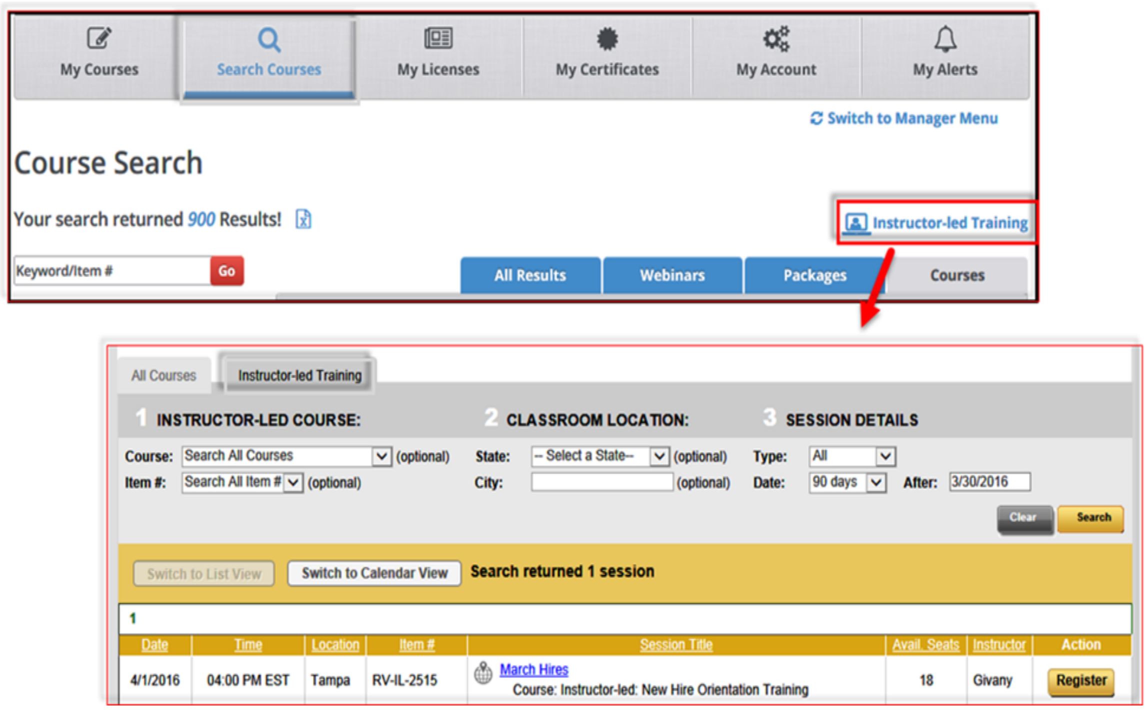
Search Courses



Course Search page

The *Search Courses* page displays all of the courses that are available in your organizations' catalog. You can search for a course by a Keyword or Item #; narrow the search by selecting a Category, Product Type, Level, or Language from the drop down menus. You can search for courses that apply to your selected filters.

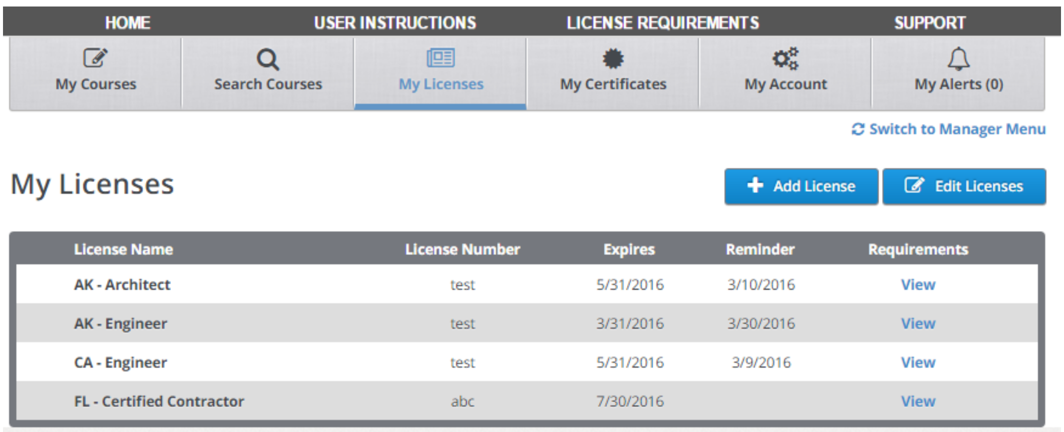
- Enroll in a course by clicking on the *enroll* button in the right most column.
- Click on the course title with your mouse to see full description of the course.
- Click on the *Export to Excel* link to export your entire library into an excel worksheet.



If the Instructor Led Training (ILT) option is enabled – Instructor-led Training page

- All current Instructor-led Training sessions will automatically be displayed, or you can search for an Instructor–led Training session by the ILT course information (title or item #), the classroom location information (State and/or city) or by the session detail information (type or date).
- Click on the *register* button in the far right column to register for the specific session. Once registered, the button will change to say *withdraw*. Click on the *withdraw* button to withdraw your registration from the specific session.
- Click on the *session title* link to see the details of the specific session.

My Licenses

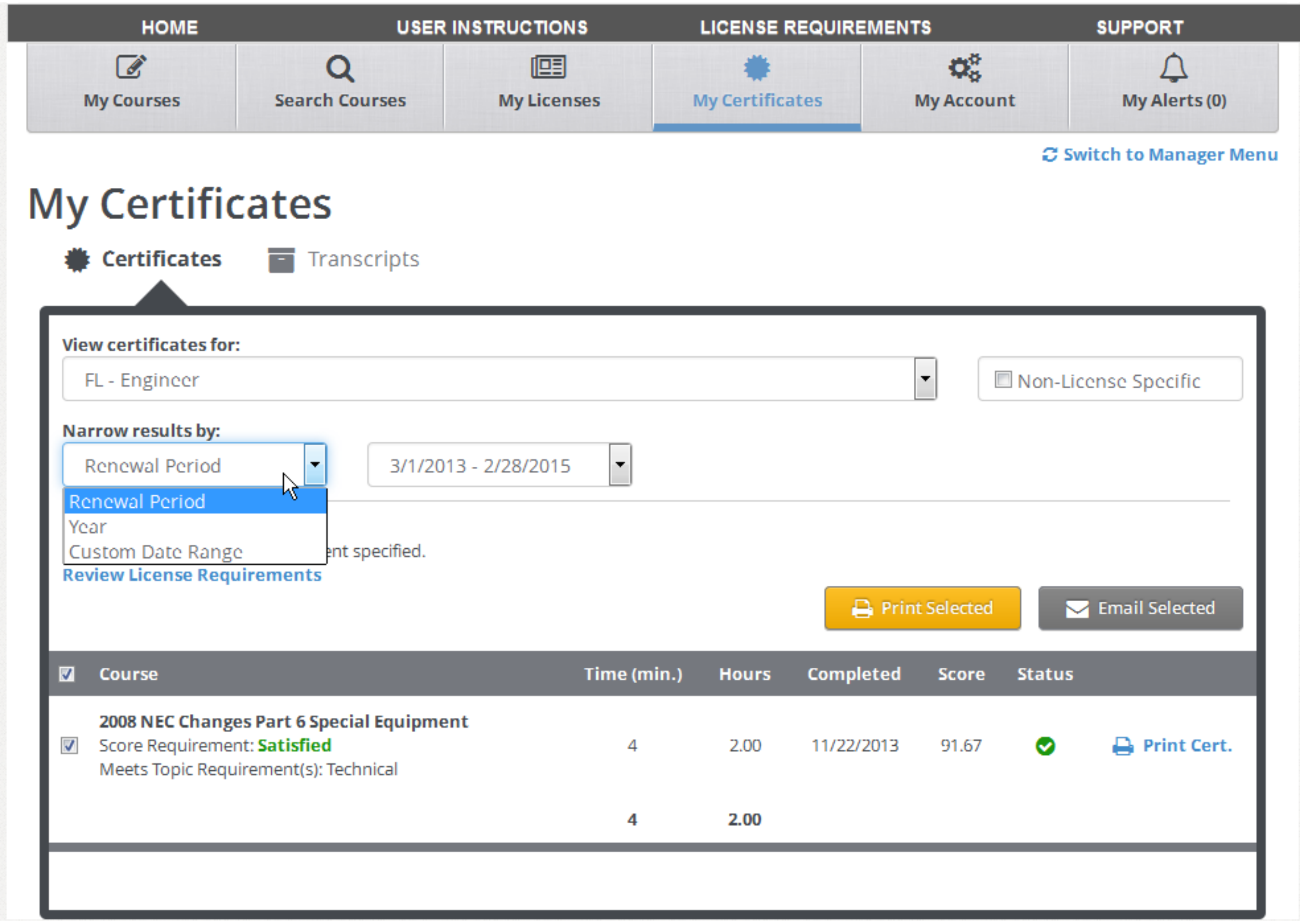


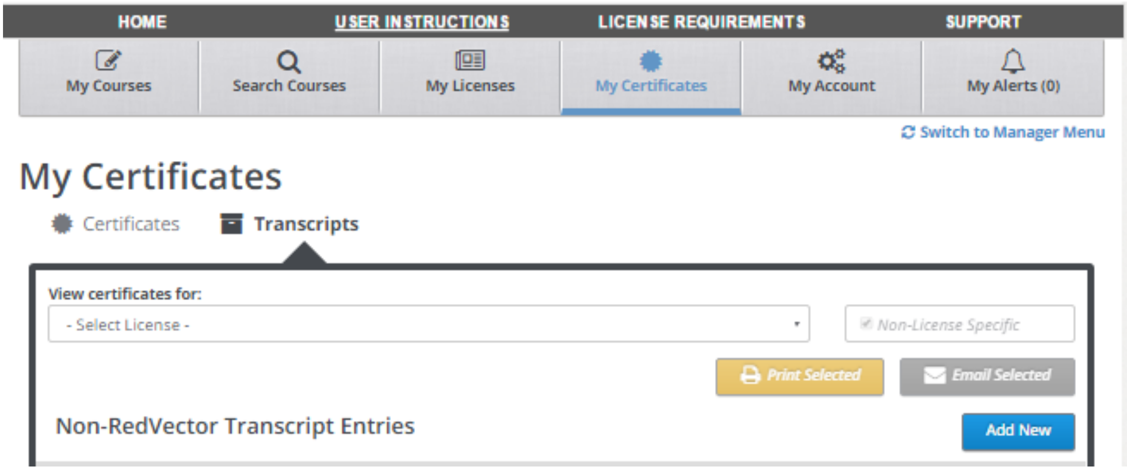
Adding a New License

- Begin by selecting the Add License button
- Select the Profession
- Select the State
- Click on the *Add* button

  After clicking the *Add* button it will generate the specific license information for your selected licenses and provide the License Requirements.
- Include license number and expiration date for each license. You also have the option to include a Custom Reminder Date to receive a License Expiration Reminder if selected from the Reminder Settings under the My Profile button.

My Certificates





The My Certificates section is where all available certificates of completion can be viewed as well as all transcript records.

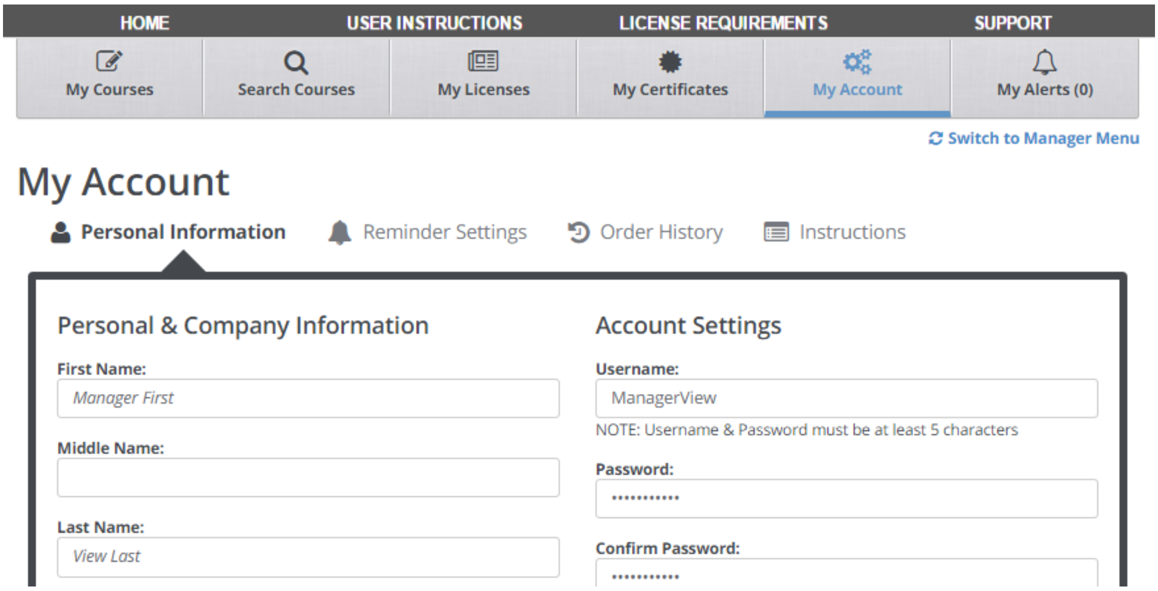
My Certificates page

- Begin by selecting your specific License or Non-License Specific option, then:
    1. By Renewal Period: select a renewal period from the drop down menu then click on the *view* button.
    2. By Year: select a year from the drop down menu then click on the *view* button.
    3. By Custom Date Range: enter the start and end dates then click on the *view* button.
- To print a single certificate or multiple certificates:
    1. Select the checkbox(es) that correspond to the certificate(s) to be printed then click on the *Print Certificate(s)* button.
    2. The certificate(s) will be displayed in a new window and can then be printed or saved as a PDF document.
- To email a single certificate or multiple certificates:
    1. Select the checkbox(es) that correspond to the certificate(s) to be emailed then click on the *Email Certificate(s)* button.
    2. In the pop-up, enter any additional email addresses that you would like to email the certificate to then click on the *Send Certificate(s)* button.

My Transcripts page

- Begin by selecting your specific License or Non-License Specific option, then:
    1. By Renewal Period: select a renewal period from the drop down menu then click on the view button.
    2. By Year: select a year from the drop down menu then click on the *view button*.
    3. By Custom Date Range: enter the start and end dates then click on the *view button*.
- The *My Transcripts* page displays completed courses as well as any courses the user is enrolled in.
- Certificates of Completion can be also printed and/or emailed from the *My Transcripts* page.

My Profile

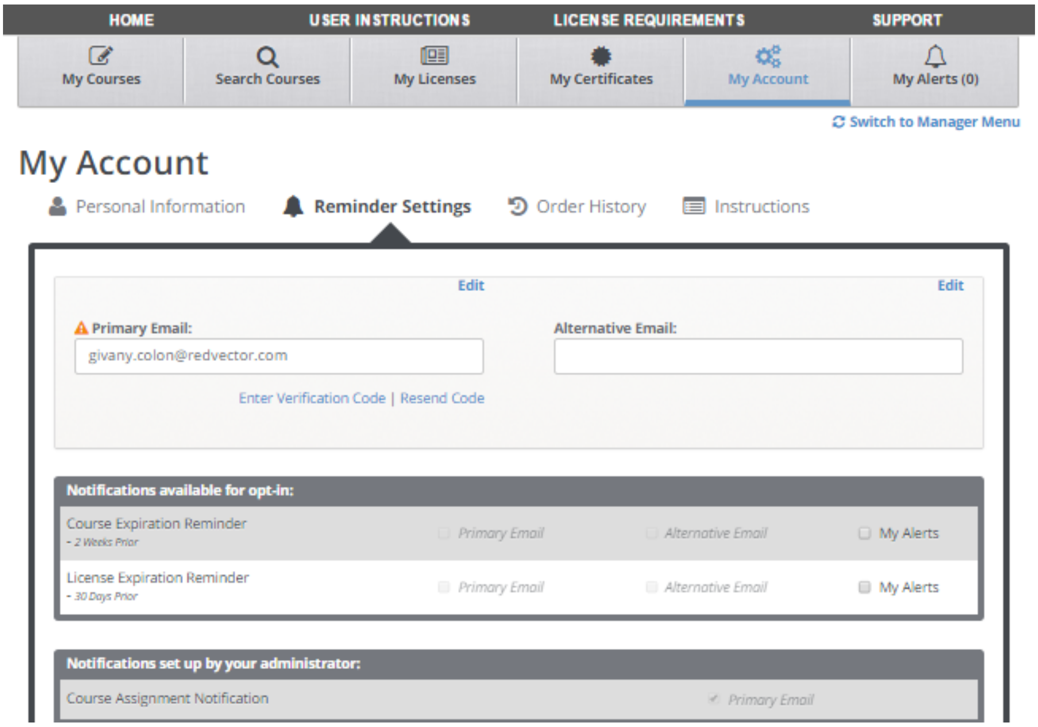


In the *My Profile* section you can view and update a users' personal information and set any reminders.

Personal Information page

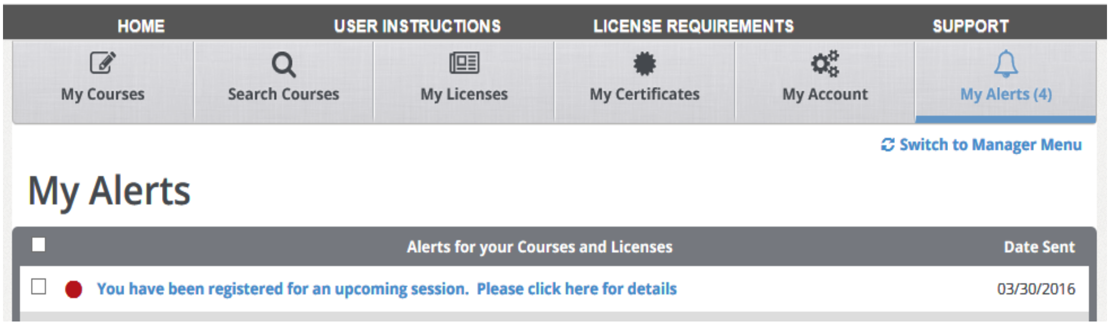
- The only fields that **cannot** be updated are the First Name, Middle Name and Last Name.
- The Address fields are populated with the address that is on file for the account.
- Once a change is made, click on the corresponding *save* button.
- Username requirements:
    1. A username can contain letters, numbers and the special characters ! @ # $ % & _ . - .
    2. A username must be a minimum of 5 characters; a maximum of 50 and cannot contain any spaces.
- Password requirements:
    1. A password can contain letters, numbers and the special characters ! @ # $ % & _ . - .
    2. A password must be a minimum of 5 characters; a maximum of 20 and cannot contain any spaces.

Reminder Settings page



- There are two types of reminders that a user can elect to receive.
    1. Reminder notification by email: A user must verify their email address before they can begin receiving these notifications.
    2. Reminder alert: Only visible when a user is logged in and all alerts will be displayed on the My Alerts page.
- An individual user can elect to receive the Course Expiration Reminder and the License Expiration Reminder (email notification, alert or both)
- A Manager on the account sets the Course Assignment Notification for all users in the account. (email notification only)

My Alerts



- If a user has elected to receive reminder notifications via alert, the alerts will be displayed on this page.

MANAGER VIEW TAB

- Overview: This section contains a link to the Manager Instruction Manual as well as brief descriptions of the Manage Users, Manage Training, Reports, Settings and Manage Library sections.

- Manage Users: Navigate to this section to search for existing users. This is also where you can upload licenses and edit student information.

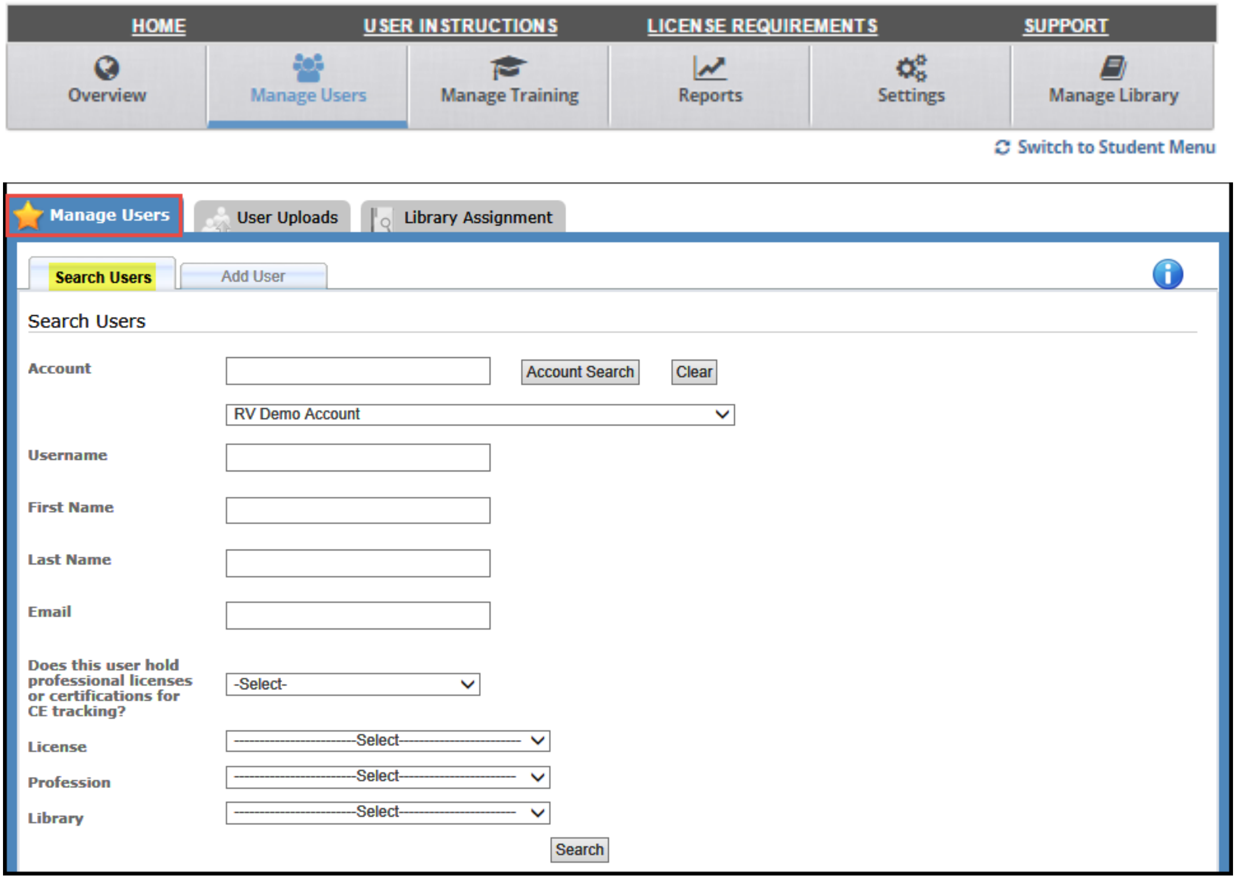
- Manage Training: Navigate to this section to search for previously created assignments or to create new assignments; to search for previously created Ad Hoc activities or to create new Ad Hoc activities; to search for previously created Competency Assessments or manage existing Competency Assessments.

- Reports: Navigate to this section to generate a One Click report or an On Demand report.

- Settings: Navigate to this section to view or update existing job roles, create new job roles or to delete existing job roles; to create new Auto Assignments or to view existing Auto Assignments; to set or change reminder notifications at the account/global level; to view users with assigned security roles or to assign security roles.

- Manage Library: Navigate to this section to view existing packages.

Manage Users

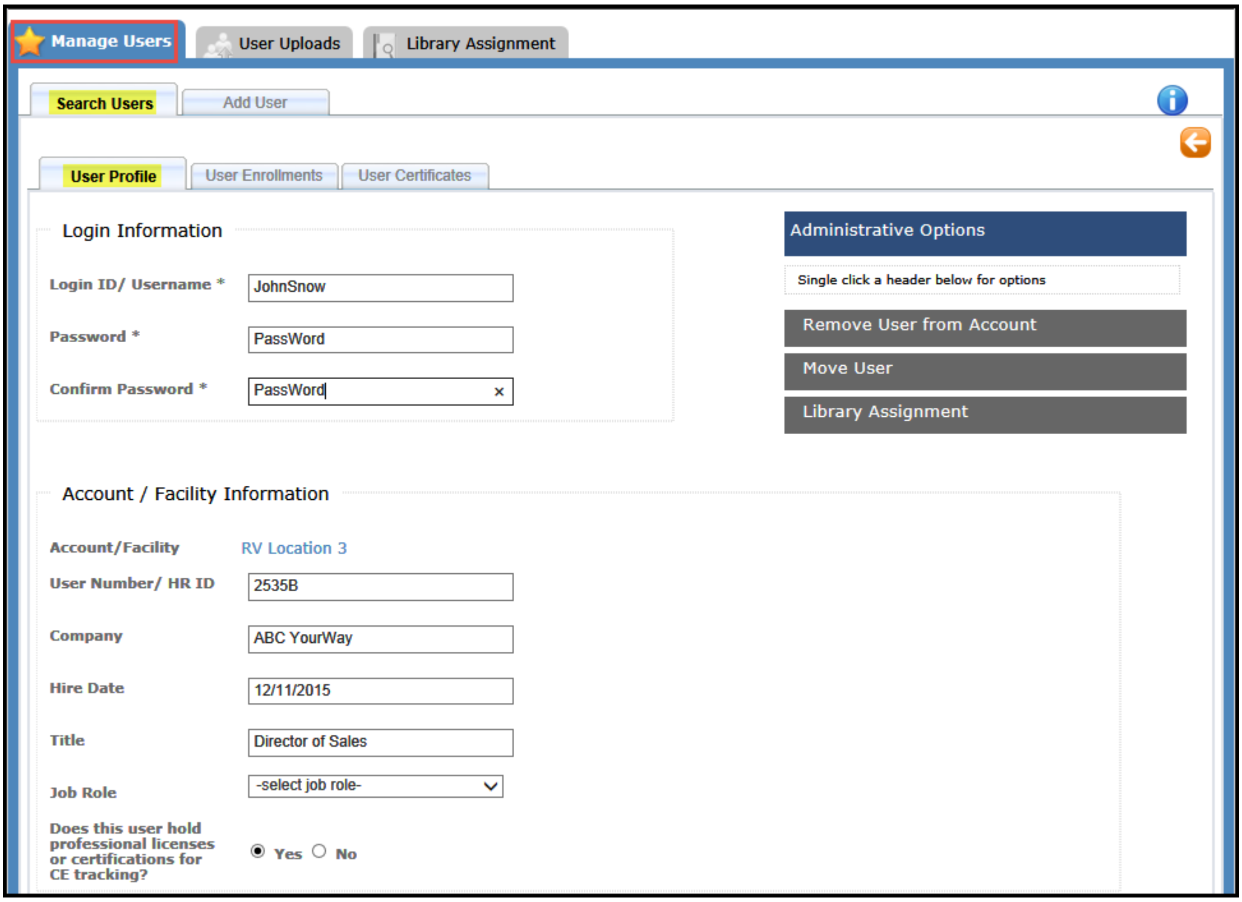


Manage Users page

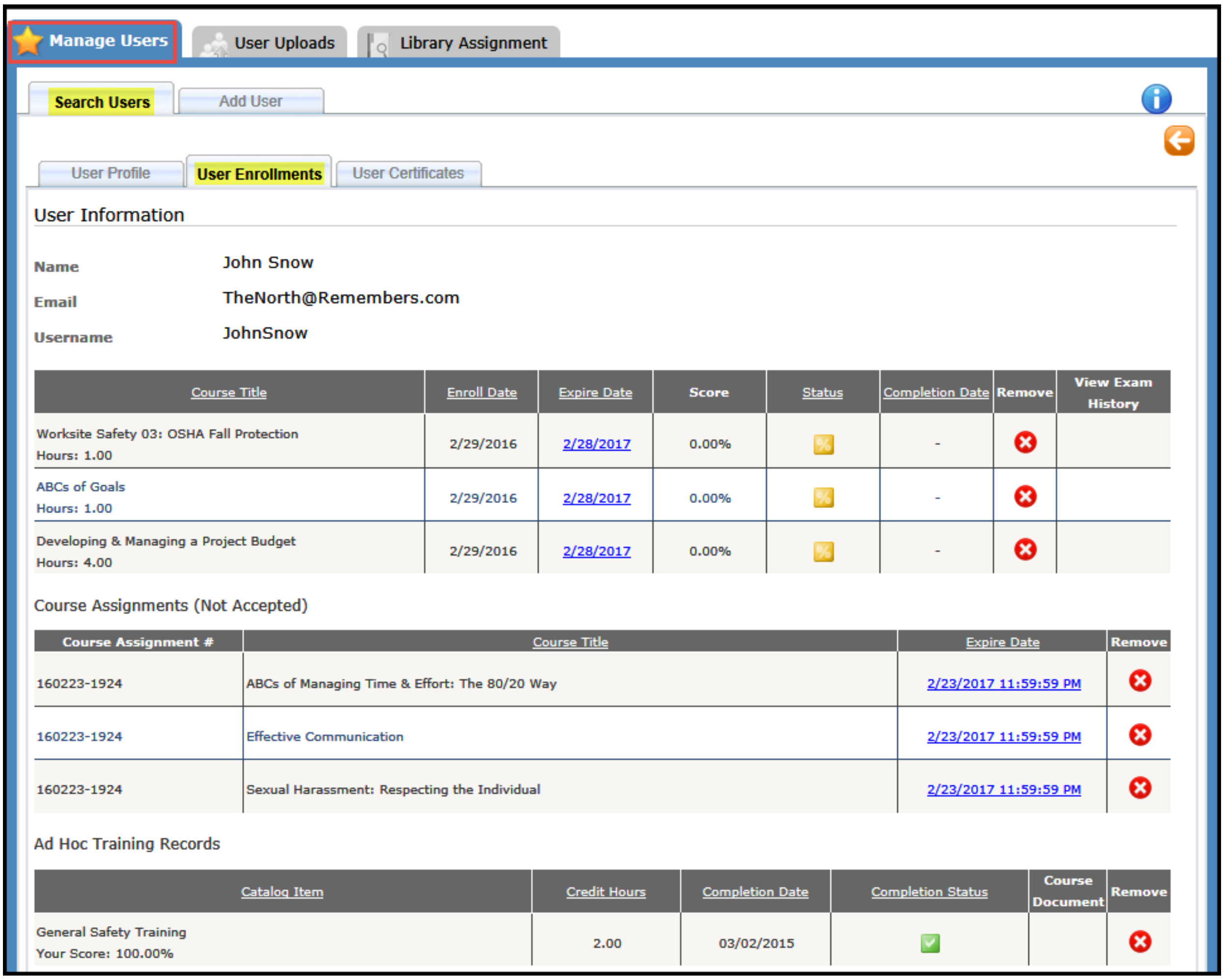
- Navigate to this section to search for existing users, to assign course libraries, upload licenses, and edit student information.

Search Users tab

1. Click on the *search* button without entering any search criteria to display a list of all users in an account.
2. To narrow the search results displayed, enter search criteria in one or more of the following fields – Username, First Name, Last Name or Email address, and then click on the *search* button.
3. If an organization has more than one facility or location, narrow the search results displayed by selecting a facility from the drop down then click on the *search* button.
4. Click on the *select* link in the *options* column to view the users' profile.

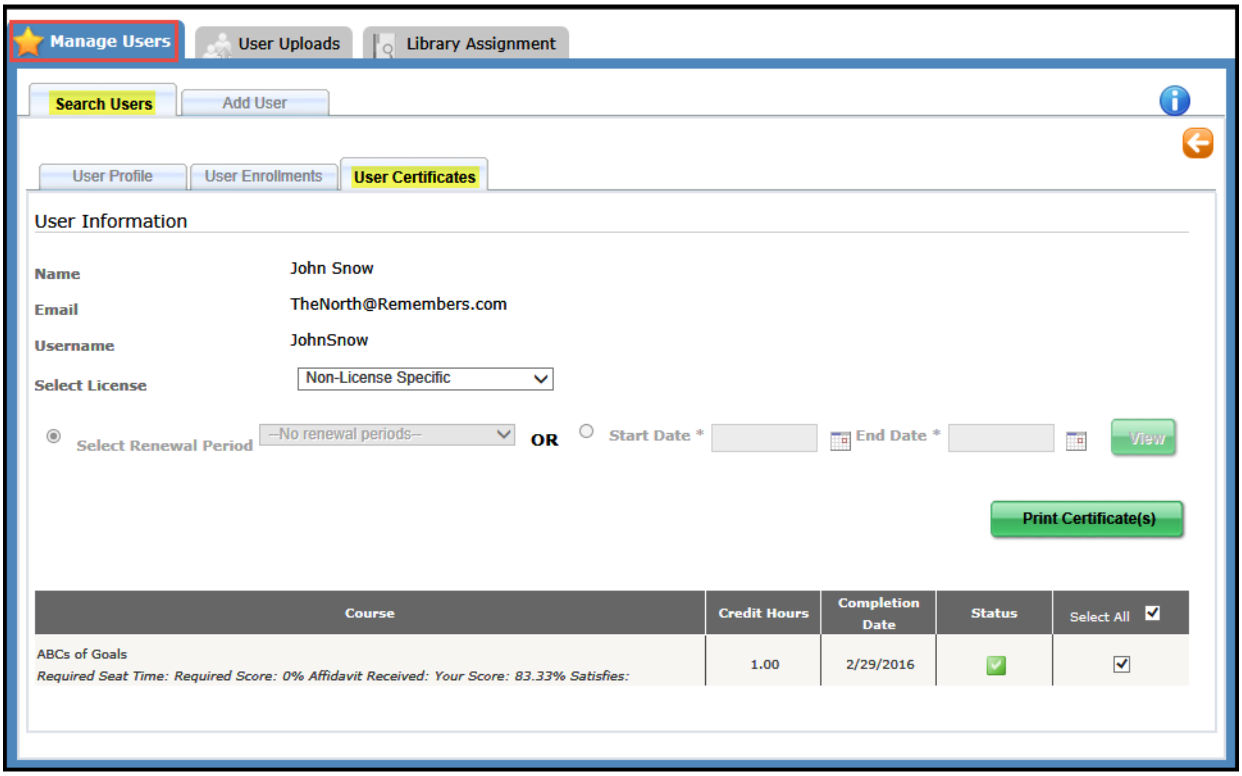


- **User Profile tab**
  1. Any of the values on this tab can be changed. All fields marked with an asterisk (*) are required. After a change is made, click on the *save* button at the bottom of the page to save the changes.
  2. Click on the *Remove User from Account* link to remove a user from an account. The user will be removed from the account, but not removed from the system – if records are needed at a later date they can be obtained if necessary by reaching out to your dedicated Account Manager.
  3. Click on the *Move User* link to move the user to a different facility within the same organization (if the organization has multiple facilities).
  4. Click on the *Library Assignment* link to view the library assignments for the user and to assign additional libraries.
- **Add New License for existing users**
  1. Click on the *Add New License* button towards the bottom of the User's Profile page. Select license from the drop down list.
  2. Add *License number.*
  3. Add *License Expiration Date.*
  4. Click the *Update* link and then click on the *Save* button to save new license information.

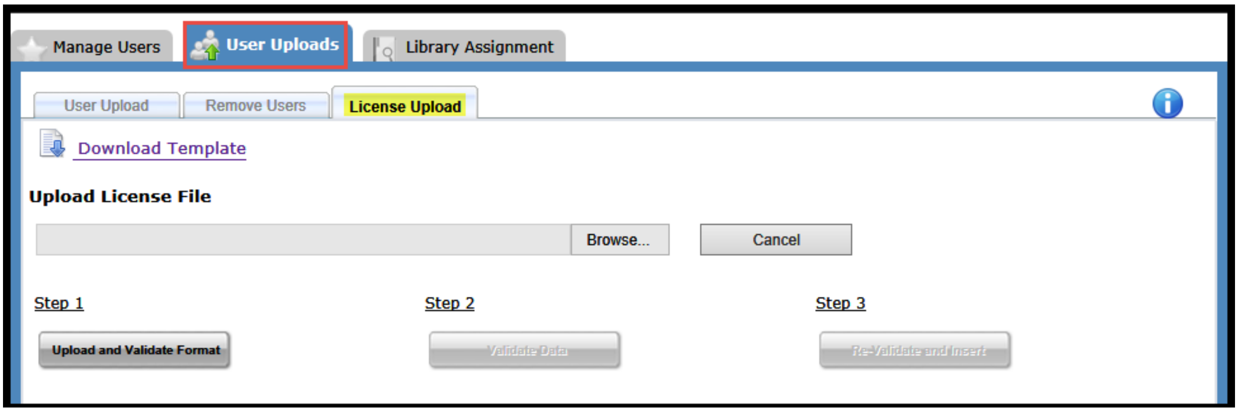


- **User Enrollments tab**

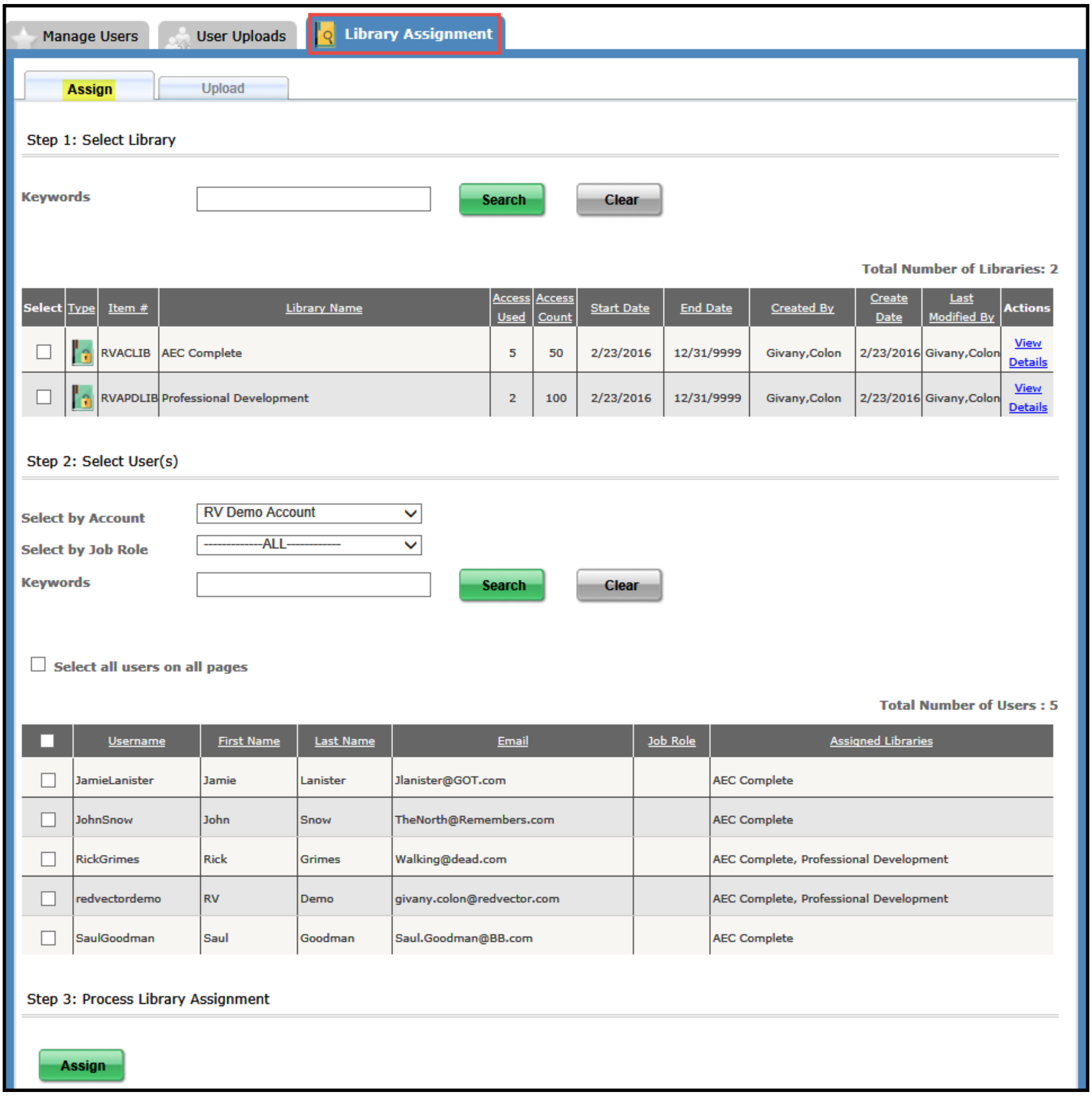
  1. View all current course enrollments, all completions, as well as those assignments the user has not accepted. Ad Hoc training records for the selected user can be viewed on this tab as well.



- **User Certificates tab**
  1. Select a License from the drop down list or enter a start and end date for a specific date range, then click on the *view* button to view all Certificate of Completion records.
  2. View / print certificates by selecting the appropriate checkbox(es) in the right most column then click on the *print certificates* button.



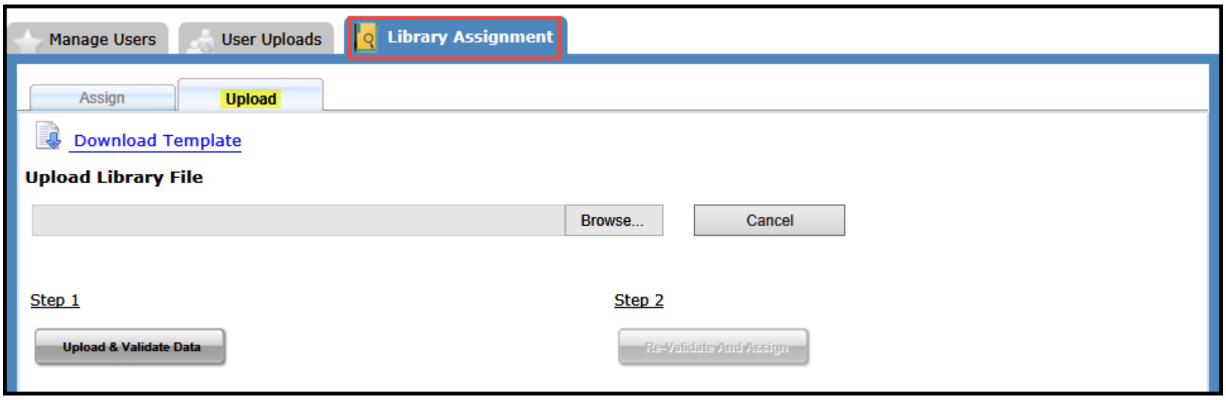
- **License Upload tab**
  1. Click on the *Download Template* link to download the User License Upload template.
  2. Complete all of the fields with red column headers and save the file.
  3. Browse for the saved file and complete steps 1-3.



Library Assignment page

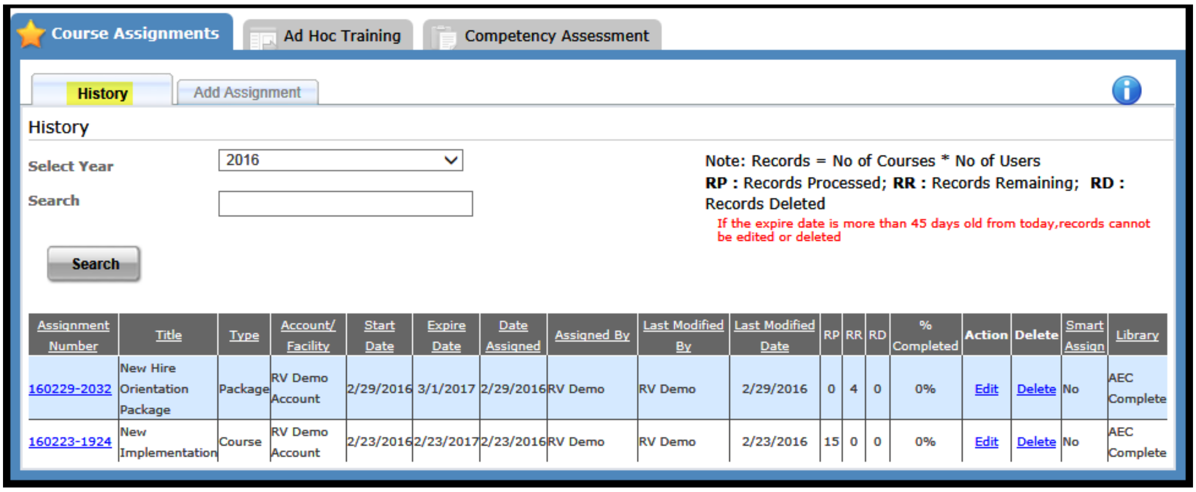
Navigate to this section to assign course libraries to users. All users must have at least one library assigned to them in order to access courses.

- **Assign tab**
  1. Select Library: select the checkbox(es) associated to the library or libraries to be assigned.
  2. Select User(s): Search for a user by selecting a facility, a job role, or by entering a keyword, then click on the *search* button. Once displayed, select the checkbox(es) associated to the user(s) that the libraries are being assigned to.
  3. Process Library Assignment: Click on the *assign* button.



- **Upload tab**
  1. Click on the *Download* template link to download the User Library Upload template.
  2. Complete the fields with red column headers and save the file. (The library number value can be found on the *assign* tab)
  3. Browse for the saved file and complete steps 1 and 2.

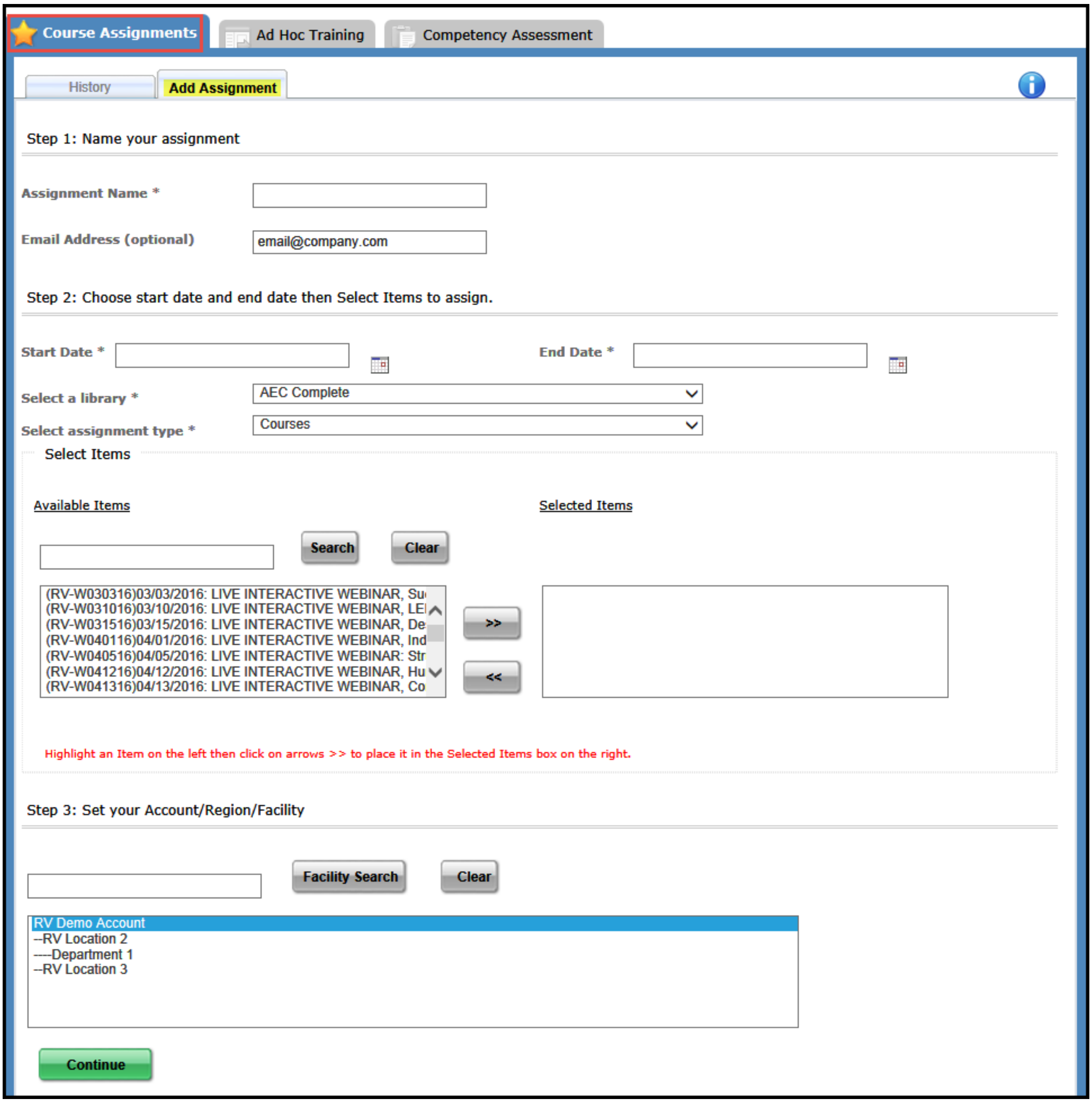
Manage Training



Course Assignments page

- **History tab**

 1. To view all previously created assignments for a specific year, select the year from the dropdown list and click on the *search* button.
 2. Narrow the search by entering an Account/Facility Name, Assignment Title or Assignment Number in the **s**earch text box, then click on the *search* button.



- **Add Assignment tab**
  1. Complete all required fields marked with an asterisk (*).
  2. If *Courses* is selected as the assignment type, the courses displayed are those that are in the selected library. If *Competency Assessment* is selected as the assignment type, the competency assessments displayed are those that are in the selected library. If *Package* is selected as the assignment type, the packages displayed are those that are in the selected library.
  3. Select a different library value to see the corresponding Courses, Competency Assessments and Packages.
  4. An assignment can contain a maximum of 10 courses, 10 Competency Assessments or one Package.

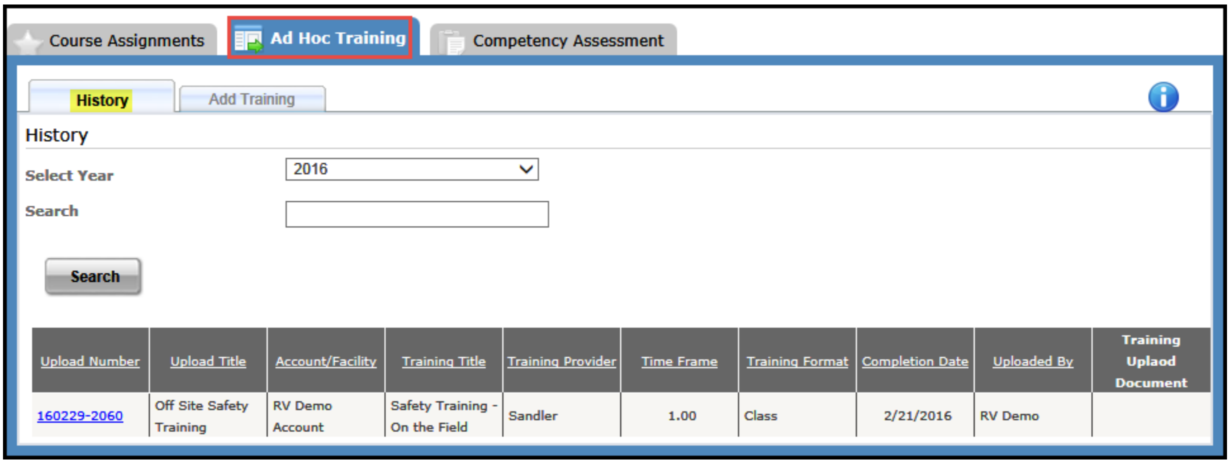
5. Select an Account/Region/Facility from the list provided then click on the *continue* button.

6. Select the checkbox(es) associated to the user(s) to receive this assignment, then select either the *Smart Assignment* or the *Basic Assignment* button.

   a. By clicking the *Smart Assignment* button, users will be assigned only those selected items for which they have not enrolled in or have been assigned within the previous 90 days, therefore omitting any duplicate enrollments.

   b. By clicking the *Basic Assignment* button, all users will be assigned all courses, regardless of previous enrollments or assignments. Using this option may create duplicate enrollments.

7. If an assignment has 30 or more records, it will be processed overnight. If an assignment has 29 or less records, it will be processed the same day it was submitted.



Ad Hoc Training page

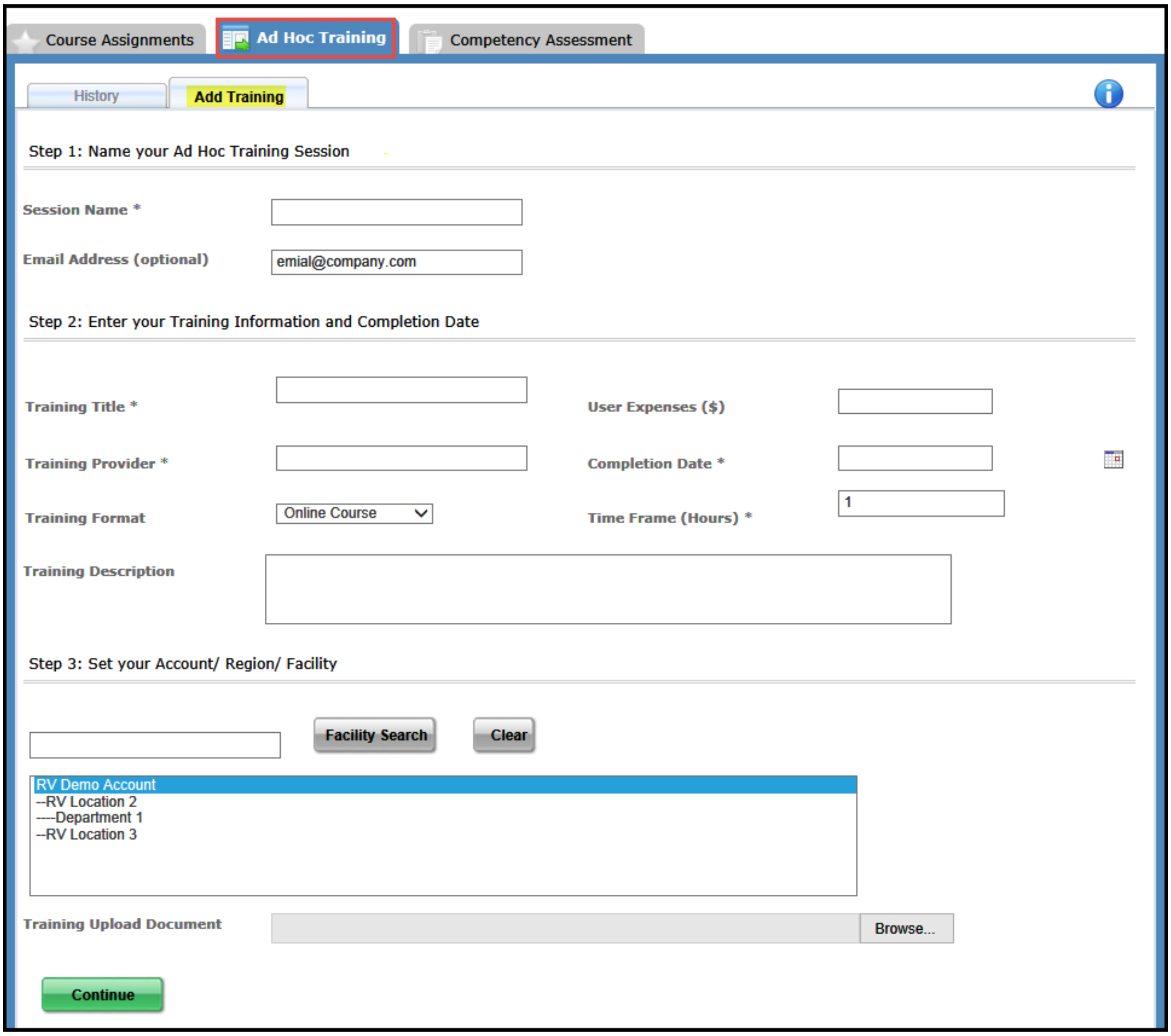
- **History tab**

1. To view all previously created Ad Hoc Training sessions for a specific year, select the year from the dropdown list and click on the *search* button.

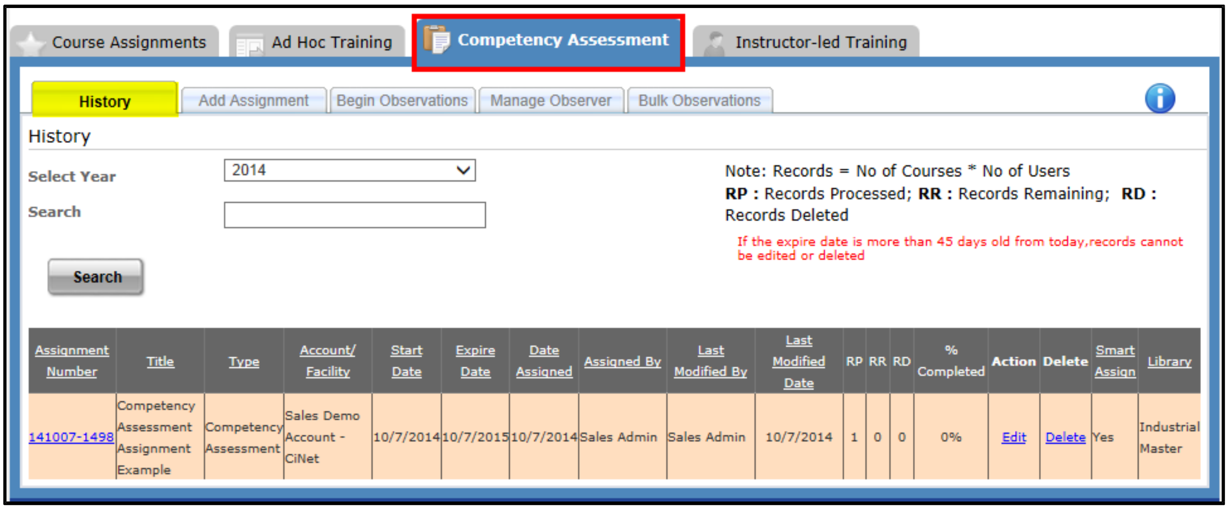
2. Narrow the search by entering an Account/Facility Name, Upload Title or Upload Number in the search text box, then click on the *search* button.

3. To view the users associated to a specific Ad Hoc Training session, click on the corresponding *Upload Number* link.

4. To view the Training Document associated to a specific Ad Hoc Training session, click on the *Training Upload Document* link.

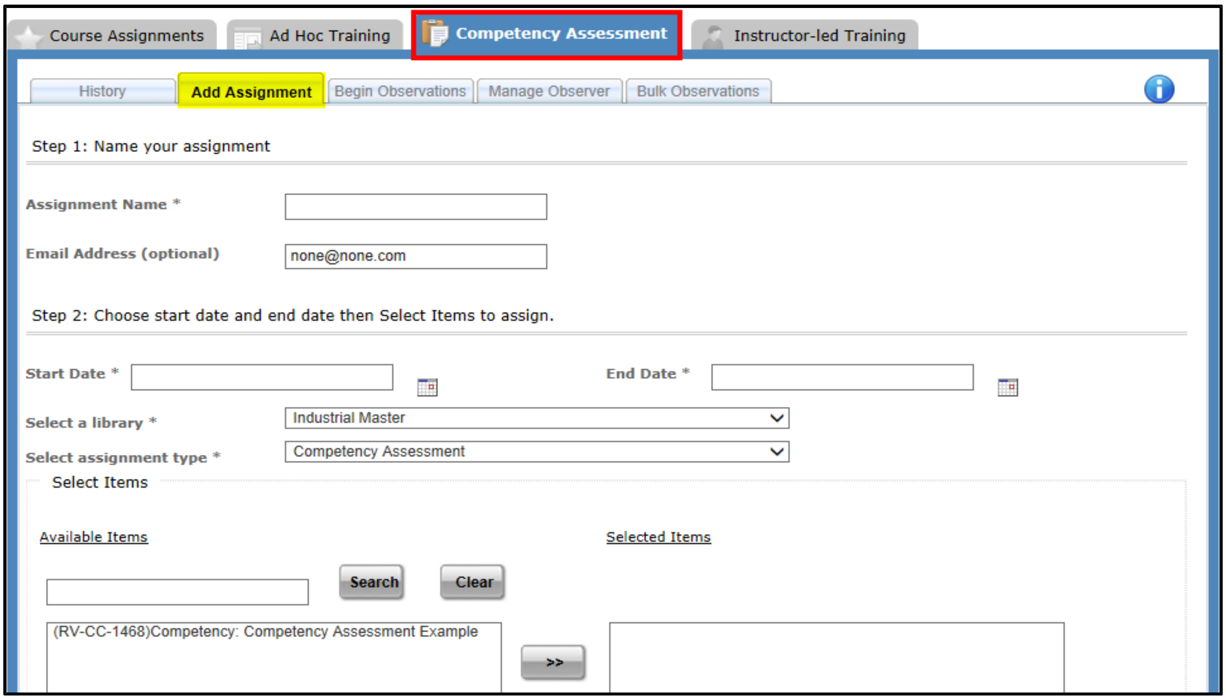


- **Add Training tab**
    1. Complete all the required fields marked with an asterisk (*).
    2. Select an Account/Region/Facility from the list provided then click on the *continue* button at the bottom of the page.
    3. Select the checkbox(es) associated to the user(s) that are to be assigned this activity.
        a. Search for a specific user by entering the users' last name in the Last Name textbox then click on the *search* button.
        b. Search for a group of users by selecting a job role from the drop down menu, then click on the *search* button.
    4. Click on the *submit* button.

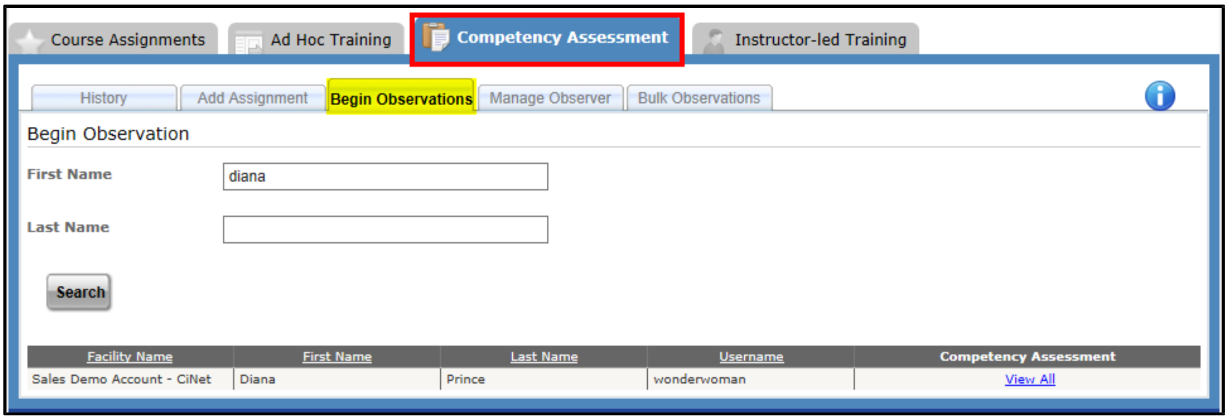


Competency Assessment page

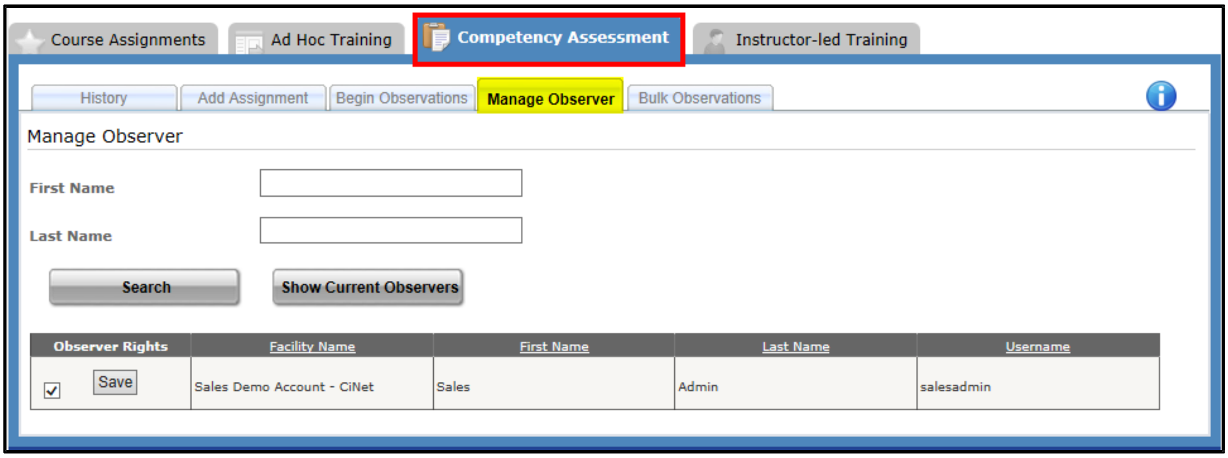
- A Competency Assessment is created in the **Manage Library** section, on the Custom Courses tab.
- **History tab**
    1. View all previously created Competency Assessments by selecting a specific year from the dropdown list then click on the *search* button.
    2. To view the users associated to a specific Competency Assessment, click on the corresponding *Assignment Number* link.
    3. To change the Expire Date value, click on the *Edit* link. To delete the Competency Assessment, click on the *delete* link.



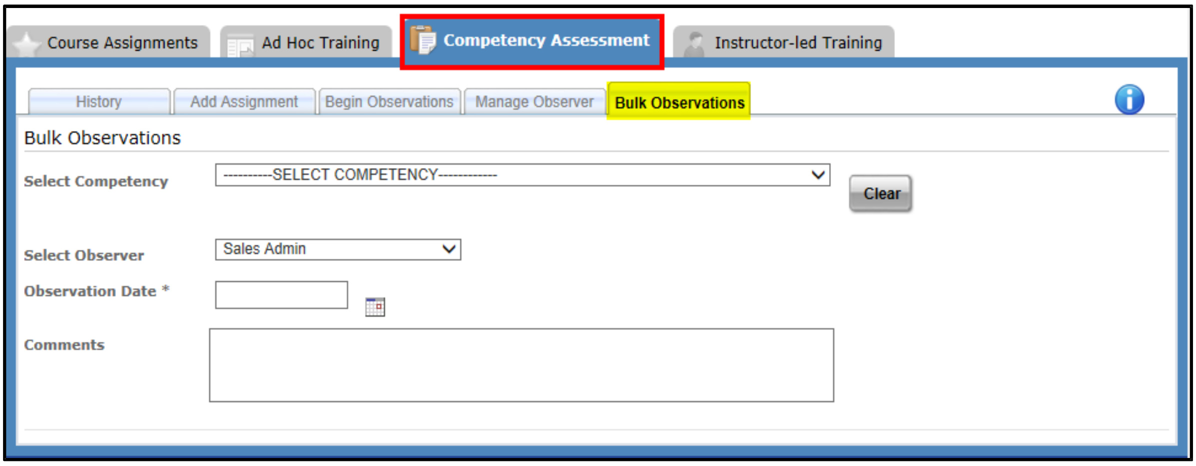
- **Add Assignment tab**
    1. Complete all of the required fields marked with an asterisk (*).
    2. Competency Assessment is the only option in the Select Assignment Type drop down menu.
    3. The Competency Assessments available to be assigned are related to the library selected. Select a different library to see the Competency Assessments associated to the newly selected library.
    4. Select an Account/Region/Facility from the list provided then click on the *continue* button.
    5. Select the checkbox(es) associated to the user(s) that you would like to assign the Competency Assessment to then select either the *Smart Assignment* or the *Basic Assignment* button.
        a. By clicking the *Smart Assignment* button, users will be assigned only those selected items for which they have not enrolled in or have been assigned within the previous 90 days, therefore omitting any duplicate enrollments.
        b. By clicking the *Basic Assignment* button, all users will be assigned all courses, regardless of previous enrollments or assignments. Using this option may create duplicate enrollments.



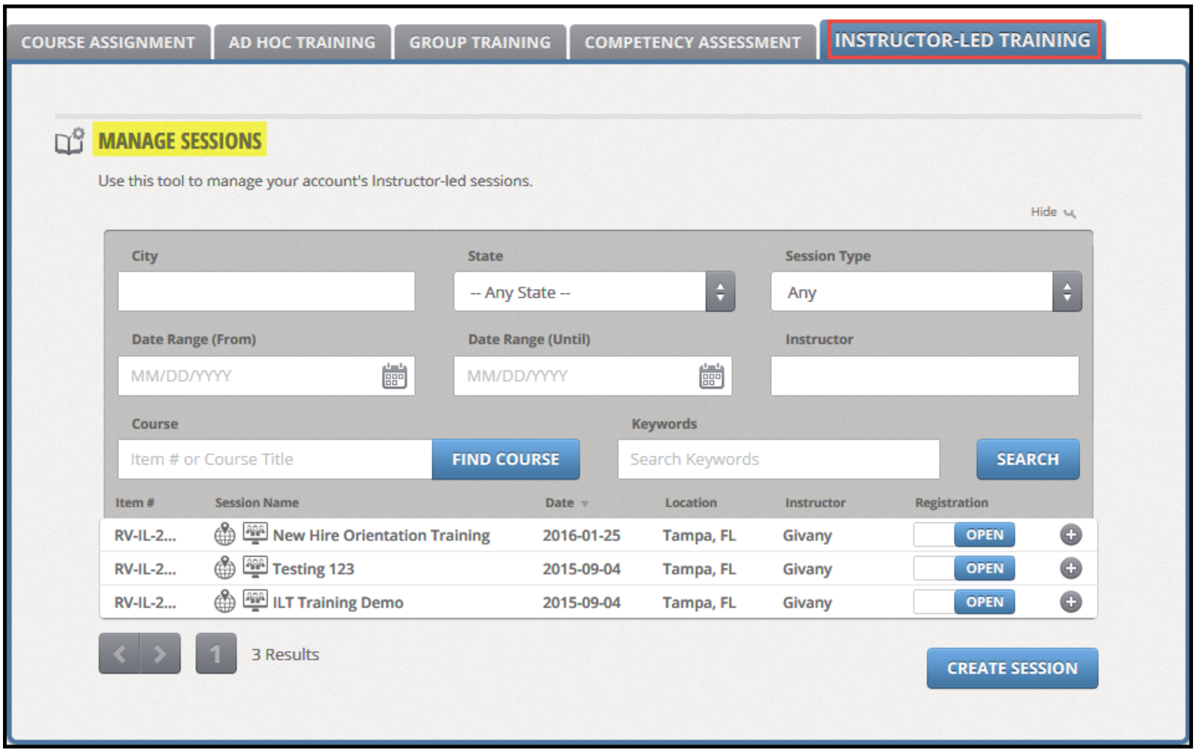
- **Begin Observations tab**
    1. Click on the *search* button without entering any search criteria to see all of the users in the account.
    2. To narrow the search results, enter a users' first and/or last name, then click on the *search* button.
    3. Click on the *view all* link that corresponds to the selected user to see all of the Competency Assessments assigned to that user.



- **Manage Observer tab**
    1. Click on the *search* button without entering any search criteria to see all of the users in the account.
    2. To narrow the search results, enter the users' first and/or last name, then click on the *search* button.
    3. Click on the *Show Current Observers* button to display a list of users that have the Observer security role assigned to them.
    4. To give a specific user observer rights, select the corresponding checkbox in the Observer Rights column and click on the *save* button.



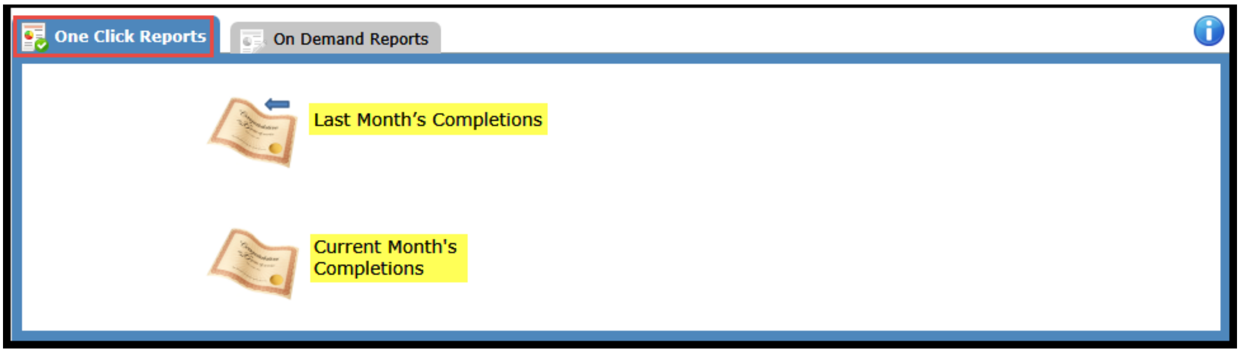
- **Bulk Observations tab**
    1. To display a list of users that have not completed a specific Competency Assessment, select the Competency Assessment from the drop down list.
    2. Select the checkbox(es) associated to the user(s) to be observed, then click on the *Submit Observations* button to submit a passing observation for the user(s) selected.



Instructor-Led Training Page

- **Manage Sessions Section**
    1. Click on the *create session* button and complete the highlighted fields to create a new Instructor-Led Training Session.
    2. Previously created sessions are automatically displayed at the bottom of the Manage Sessions grid.

Reports



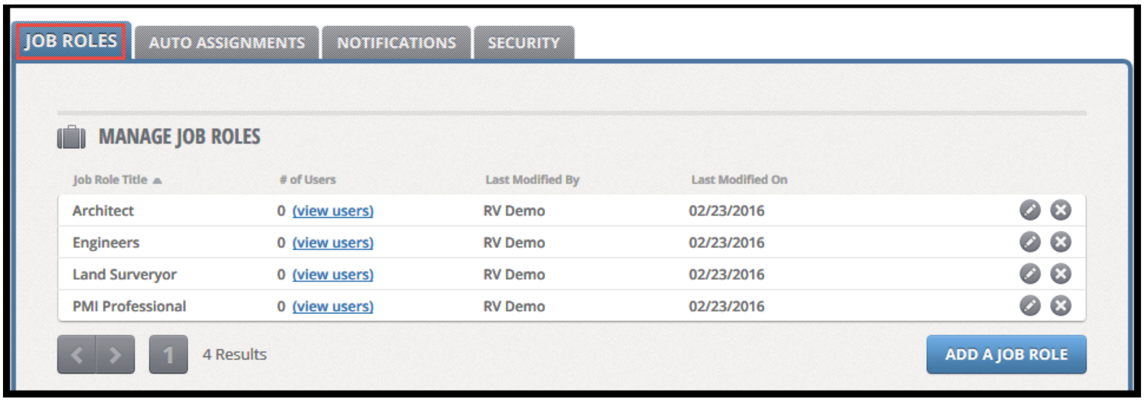
One Click Reports

- Last Month's Completions: Click on this link to see all of the completions for the previous month.
- Current Month's Completions: Click on this link to see the completions for the current month.
- Once the report is generated, it can be viewed/saved in one of seven different formats (XML file with report data, CSV, PFD, MHTML, Excel, TIFF & Word), or it can be printed.

On Demand Reports

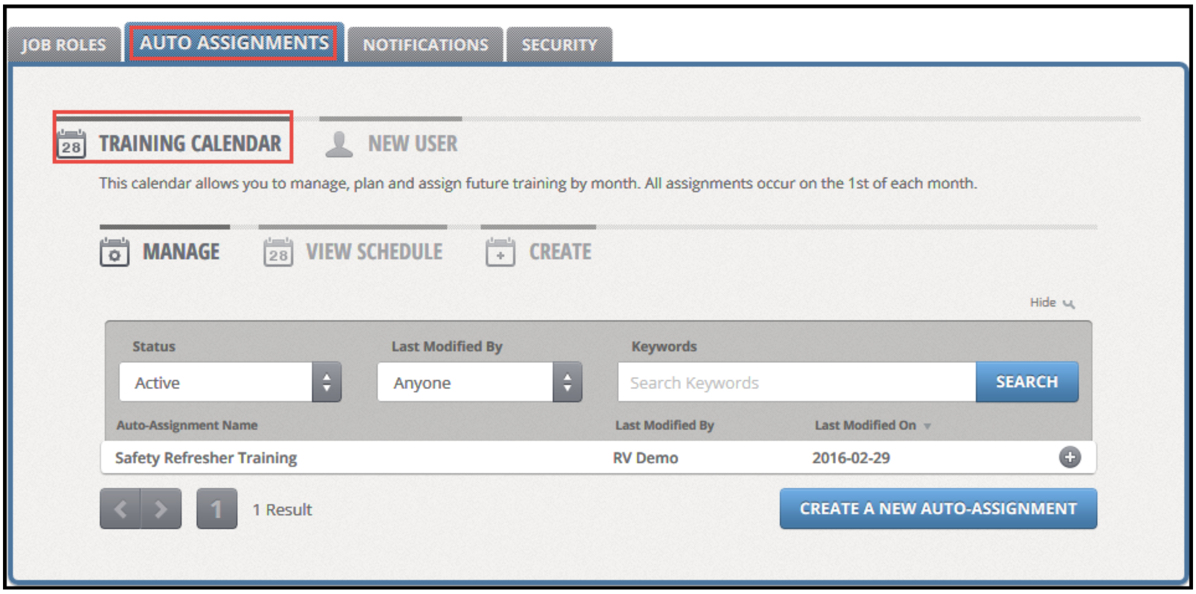
- All of the On Demand Reports require the user to enter or select search criteria such as a date range, a facility/location, a job role, a username, etc.
- Once the report is generated, it can be saved in one of the previously mentioned seven formats, or it can be printed.

Settings



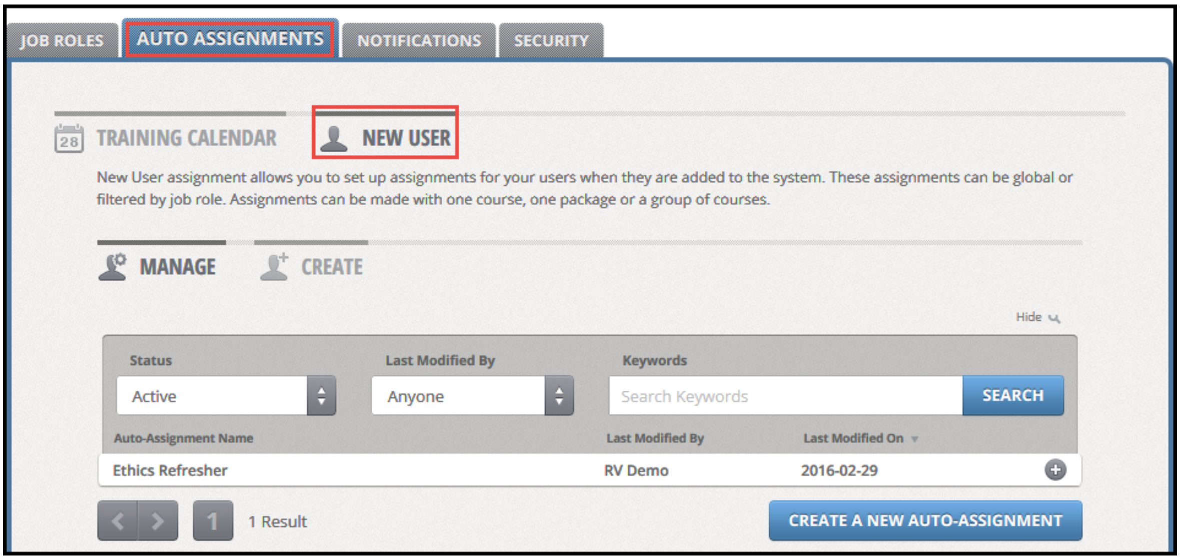
Job Roles

- In this section existing job roles can be viewed, changed or removed and new job roles can be added.

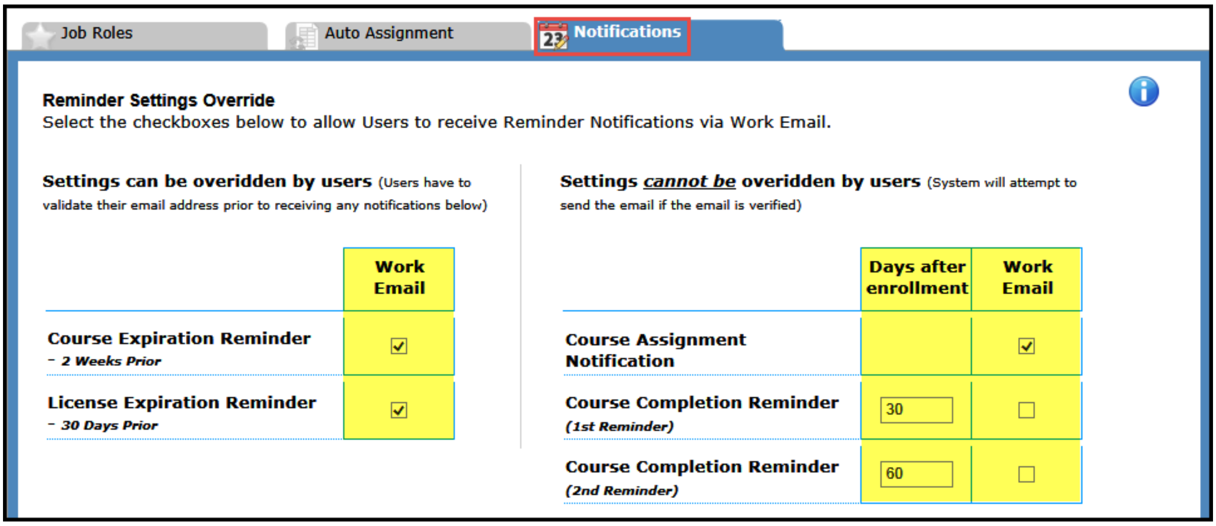


Auto Assignments

- **Training Calendar:**
    1. Existing Auto Assignments are automatically displayed.
    2. Use this type of auto assignment to make assignments by specific job role for selected months that will happen year after year.
    3. Manage, plan and assign future training by month. All assignments occur on the 1st of each month.

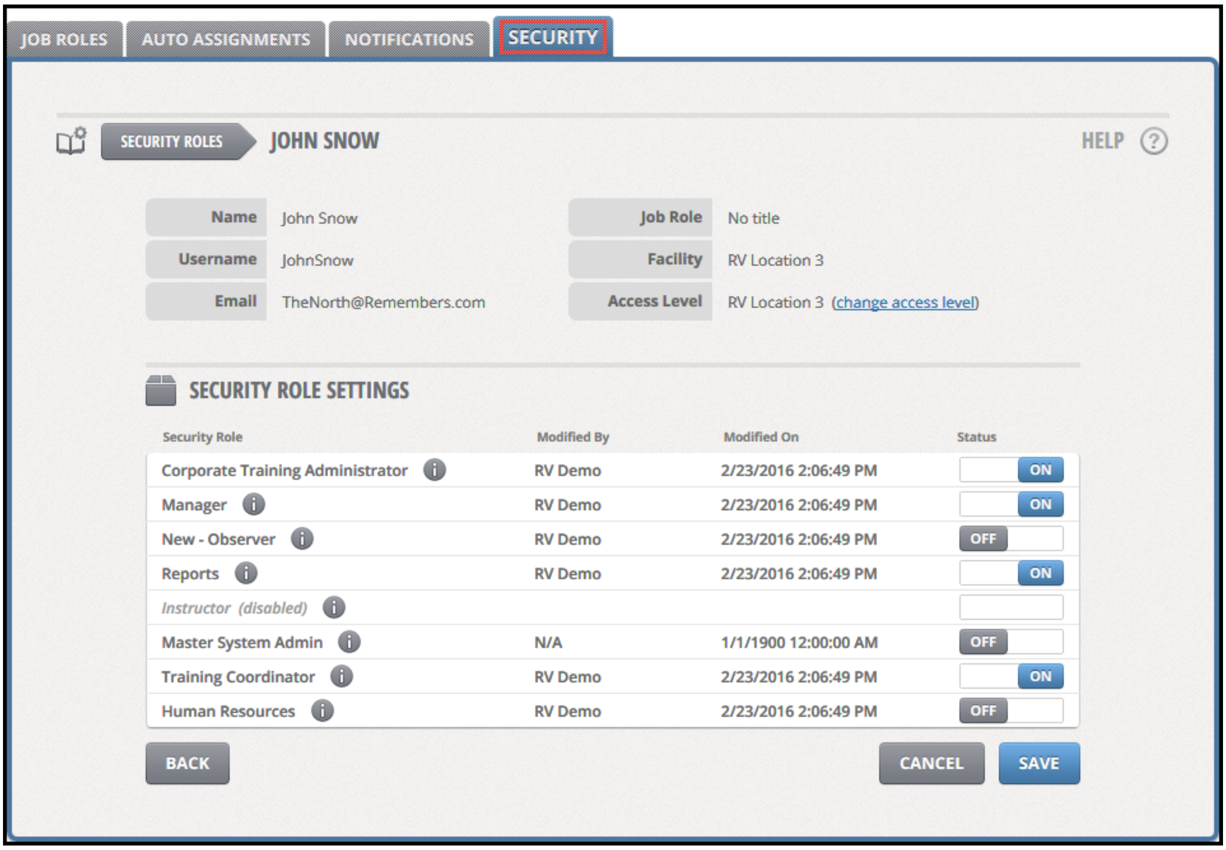


- **New User:**
    1. Existing active Auto Assignments are automatically displayed.
    2. Use this type of Auto Assignment to make assignments to user(s) when they are newly added into the system.
    3. This type of Auto Assignment can be assigned globally or by job role.



Notifications

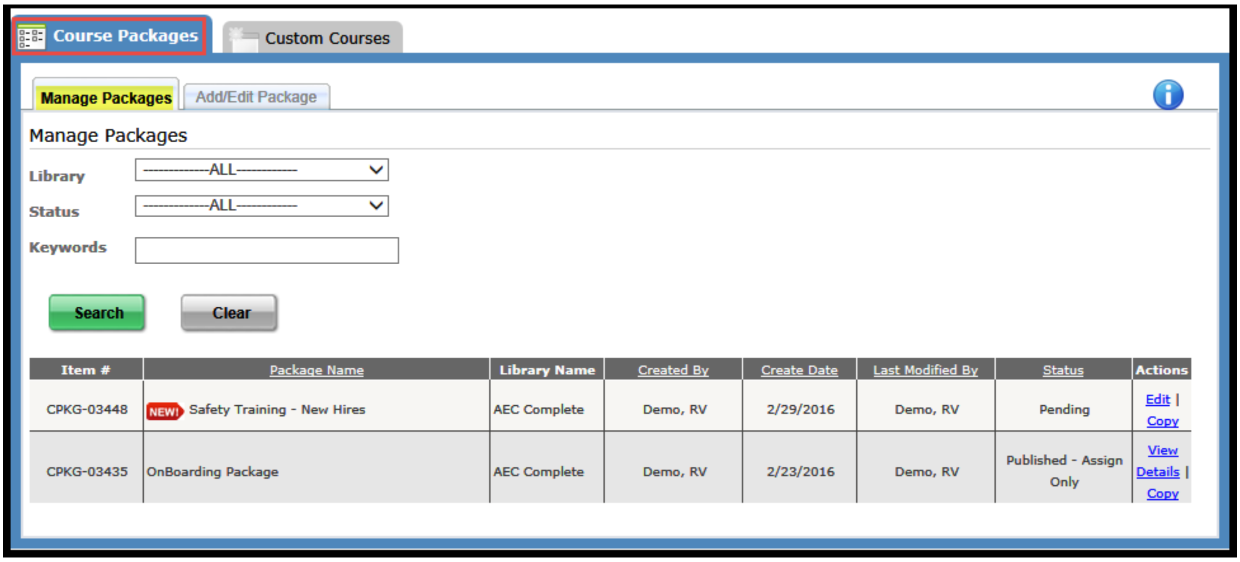
- There are two types of reminder notifications that can be set at the global/account level; those that can be overridden by the user and those that CANNOT be overridden by the user.
- Those that can be overridden by the user include:
    1. Course Expiration Reminder – sent two weeks prior to a course expiration date.
    2. License Expiration Reminder – sent 30 days prior to a license expiration date.
- Those that CANNOT be overridden by the user include:
    1. Course Assignment Notification – sent when a new course/competency assessment/package has been assigned to the user.
    2. Course Completion Reminder (first reminder) – Sent a specified number of days AFTER a user has enrolled/been enrolled in a course. (default value of 30 days)
    3. Course Completion Reminder (second reminder) – Sent a specified number of days AFTER a user has enrolled/been enrolled in a course. (default value of 60 days)



Security

- In this section, Security Roles are assigned.
    1. There are a total of eight (8) security roles.
    2. To see the specific functions associated to each security role, click on  that is at the end of each security role title.

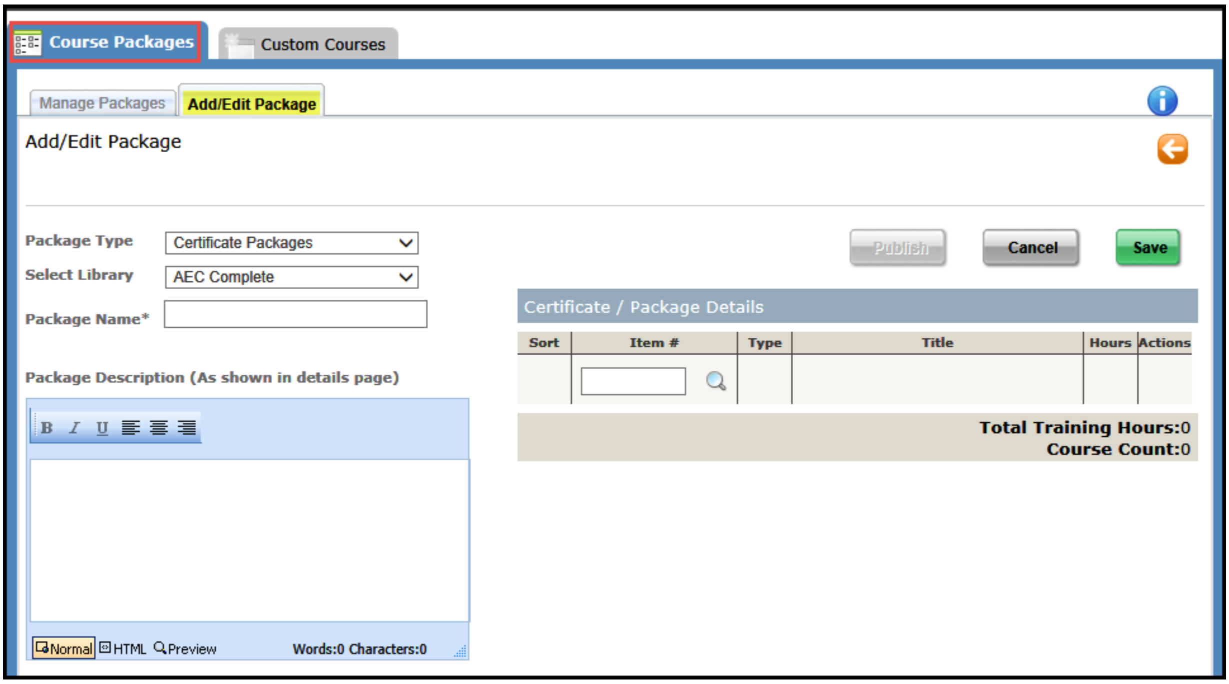
Manage Library



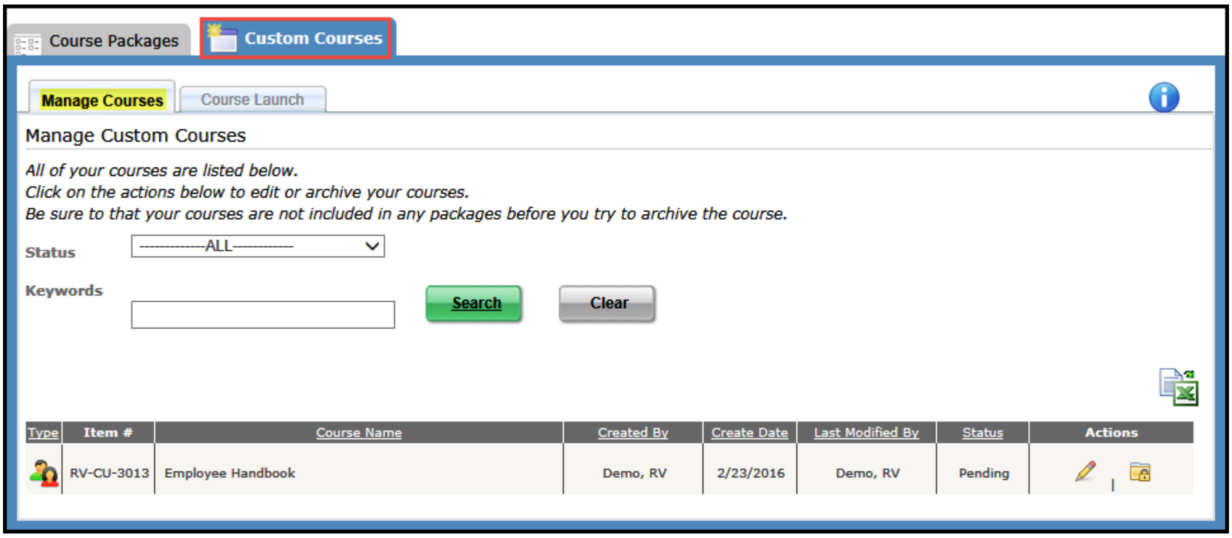
Course Packages Page

- **Manage Packages tab**

  1. All packages will automatically be displayed on this page.
  2. To find all of the packages associated to a specific library, select a library from the drop down list then click on the *search* button.
  3. To find all of the packages with a specific status, select a status from the drop down list then click on the *search* button.
  4. Enter a word/partial word used in the package name or the item number/partial item number in the Keywords field and then click on the *search* button to display those packages that match the search criteria.



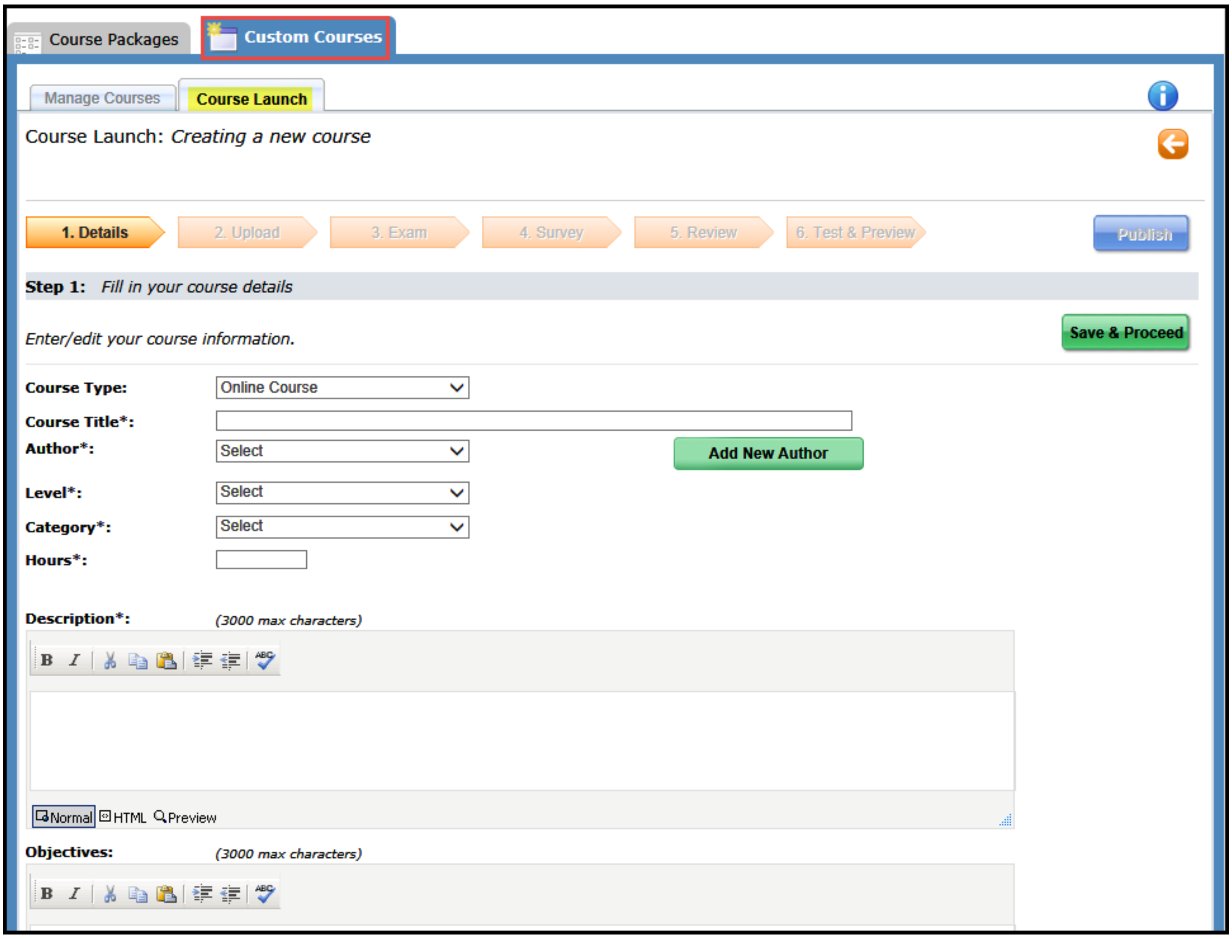
- Add/Edit Packages tab – There are two (2) types of packages; certificate package and package.
  1. Certificate Package:
     a. Can contain a maximum of 50 courses
     b. The courses can be placed in a specified sequence, requiring the user to complete the courses in the specified sequence order
     c. A certificate of completion is associated to each individual course as well as the overall package
  2. Package:
     a. Can contain a maximum of 50 courses
     b. The courses can be taken in any order
     c. A certificate of completion is associated to each individual course *only*



Custom Courses Page

- **Manage Courses tab**

    1. Click on the *search* button without any search criteria to display all custom courses (Instructor-Led Training & Competency Assessments).
    2. To find all of the custom courses with a specific status, select a status from the drop down list then click on the *search* button.
    3. Enter a word/partial word used in the course name or the item number/partial item number in the Keywords field and then click on the *search* button to display those custom courses that match the search criteria.
    4. Click on the pencil icon to make changes to the custom course.
    5. Click on the folder/lock icon to archive the custom course.



Custom Courses Page

- **Course Launch tab** – this is where custom courses (Online Course, Instructor-Led Training or Competency Assessment) are created.

  1. DETAILS: Complete all fields, then click on the *save and proceed* button.
  2. UPLOAD: Browse for a saved file to attach to the custom course, then click on the *save and proceed* button.
  3. EXAM: Create an exam, then click on the *save and proceed* button.
  4. SURVEY: Associate a survey if you wish, then click on the *save and proceed* button.
  5. REVIEW: Review the Custom Course to make sure it is correct, then click on the *save and proceed* button.
  6. TEST & PREVIEW: Enroll in the course you created so that you can see it as the users will, or publish it without enrolling first.
  7. Once a custom course has been created it can then be assigned.

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