

TFA Training Administrator Notes – <Organisation Name>

Introduction

TFA Training is to be used by <Organisation Name> to provide training to its staff. The chief contact at <Organisation Name> is <Contact Name>.

The training courses which are being made available to staff are <List of Courses>.

The training courses are being administered through the <Department Name> department of <Organisation Name>. The TFA Training Administrator within the <Department Name> department is <Contact Name>.

These notes show how the TFA Training Administrator can set up users and check on their progress through courses.

Training scenario

In this training scenario David Jones, a member of staff in the administration office, is to be given access to the training courses by the TFA Training Administrator within the <Department Name> department.

Within this scenario, we will set up the administration office as a department and grant access to the training courses to David Jones.

User Ids

Users gain access to the TFA Training platform through their user id, which consists of an e-mail address and a password. The e-mail addresses and passwords are allocated to users by the TFA Training Administrator.

Users can have more than one user id, to reflect the different uses they make of the TFA Training platform. For example, <Contact Name> is set up as both the TFA Training Administrator, to enable him/her to set up departments and users, and as an individual user, to enable him/her to take and retake the training courses.

E-mail addresses can either be the individual's genuine e-mail address or a fictional e-mail address which relates to their role.

The standard format for passwords is to base them on the name of the individual or role, capitalised as appropriate and with numbers substituted for letters as follows:

- '0' is substituted for 'o';
- '1' is substituted for 'i';
- '3' is substituted for 'e';
- '5' is substituted for 'a'.

As an example, the user ids for <Contact Name> (in his/her roles as TFA Training Administrator and an individual user within the <Department Name> department) and David Jones (of the administration office) are:

Name	Department	Role	E-mail Address	Password
<Contact Name>	<Department Name>	TFA Training Administrator	<TFA Training E-mail>	<TFA Training Password>
<Contact Name>	<Department Name>	User	<User E-mail>	<User Password>
David Jones	Administration	User	<David Jones E-mail>	<David Jones Password>

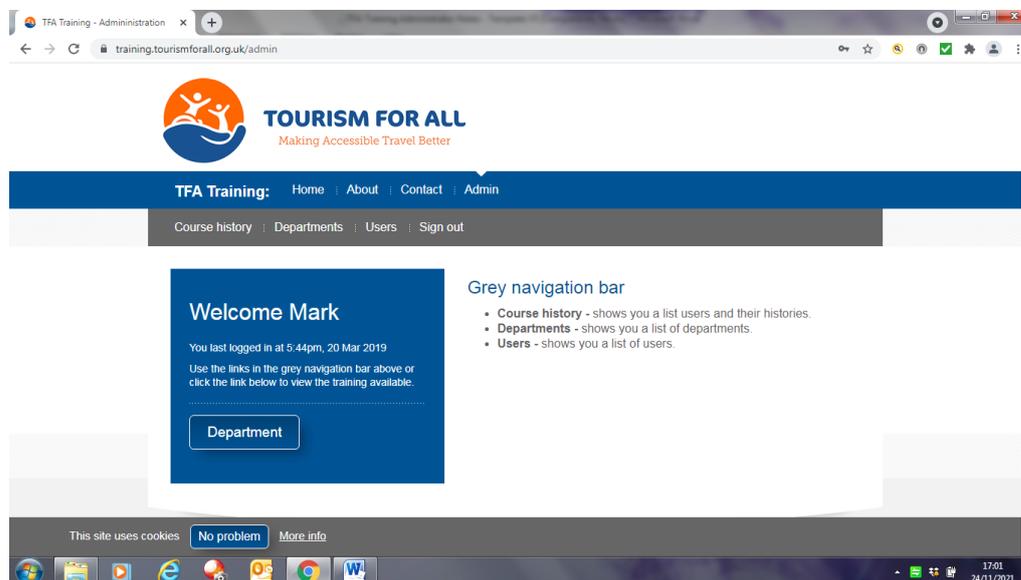
Logging in as TFA Training Administrator

The TFA Training Administrator login details are:

User Id: <TFA Training E-mail>

Password: <TFA Training Password>

The tabs available to the TFA Training Administrator are Departments, Users and Course History (example screen below).



Setting up departments

TFA Training allows Partners to set up individual departments within their organisations, to help with the administration of the training courses. Please note that this is optional and smaller Partners may wish to set up all users of the training courses under a single department.

To set up the Administration department:

1. Select tab “Departments”

The “Department search” screen will be displayed. On first entry, the Customer Service department will be shown.

2. Select “Add department”

3. Enter department details:

- Name: Administration
- Contact: <Contact E-mail>

4. Select “Create”

Repeat this process to set up further departments, using the department’s actual e-mail address (if it has one) or allocating an e-mail address as described above.

Setting up users

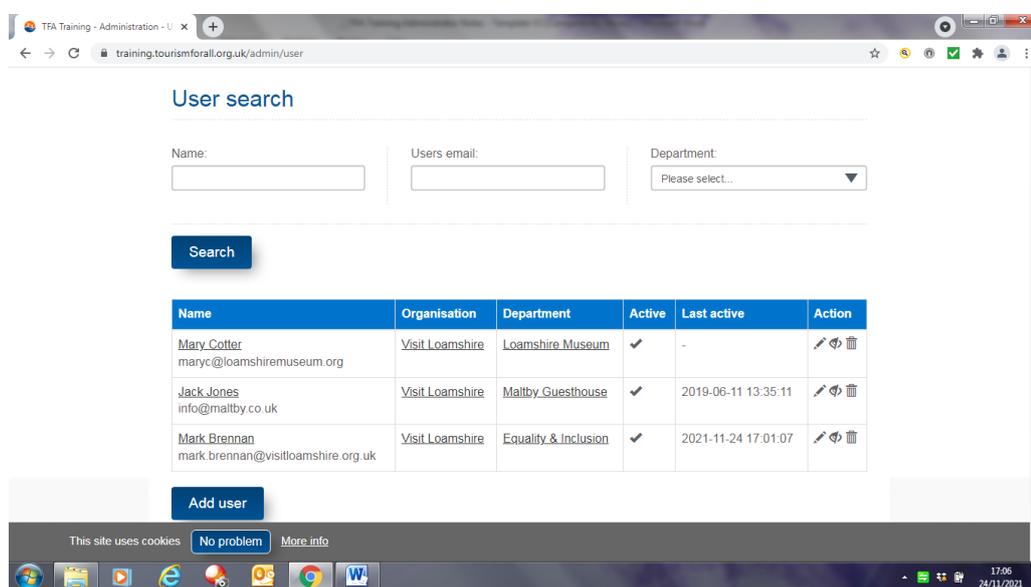
Individuals who access the training courses are set up as Users on TFA Training and are linked to the Department to which they belong.

To set up users, the user’s details are first entered and the user is then activated.

To set up David Jones, of the Administration Department:

1. Select tab “Users”

The “User search” screen will be displayed (example screen below).



On first entry, details for **<Contact Name>** (in **his/her** roles as TFA Training Administrator and an individual user) will be shown.

2. Select tab “Add user”

3. Enter user details:

- First name: David
- Last name: Jones
- Email: **<David Jones E-mail>**
- Organisation: Select **<Organisation Name>** from dropdown list
- Department: Select “Administration” from dropdown list
- Role: Select “Client User” from dropdown list

4. Select “Create”

The “User search” screen will be displayed, with David Jones at the bottom of the list.

5. Click on the “Pencil” symbol in the “Action” column against David Jones

6. Enter the password:
 - New password: <David Jones Password>
 - Confirm password: <David Jones Password>
7. Check the “User active?” box
8. Select “Update”

Repeat this process to set up and activate further users, allocating the e-mail address and password as described above.

Course history

The Course history enables TFA Training Administrators to:

- Check on the status of users and how they are progressing through the courses which are available;
- Download additional copies of certificates;
- Reset the status of users in order to enable them to retake or restart courses.

To check users’ status and progress:

1. Select tab “Course history”

The “Course history search” screen will be displayed (example screen below). On first entry, no live history will be shown.

2. To download a certificate for a user who has completed a course:
 - Select “Download certificate” in the “Progress” column against the user
3. To reset the status of a user in order to enable them to retake or restart a course:
 - Click on the “Circle” symbol in the “Action” column against the user

