TENMAST SOFTWARE
An MRI Software Company

Tenmast University Team Leader Manual

Revised: 06/14/2018

What Is A Team Leader?

Agencies can designate certain staff to be Tenmast University Team Leaders for their organization. Any user can be a Team Leader, but this role is usually reserved for Executive Directors, Training Coordinators or Supervisors.

Like any other general TU user, Team Leaders may have their own courses to complete. However, Team Leaders have access to many other features that allow them to monitor and manage TU users, teams and courses.

For security and privacy reasons, Team Leaders only have access to their own agency's users and teams. They can perform the following functions for their agency:

- View, add, deactivate and delete users.
- View teams.
- Assign users to teams.
- Unassign users from teams.
- Assign users to individual courses (restrictions apply).
- Unassign users from individual courses (restrictions apply).
- View statistics and charts related to user activity.
- Generate and schedule pre-defined reports.

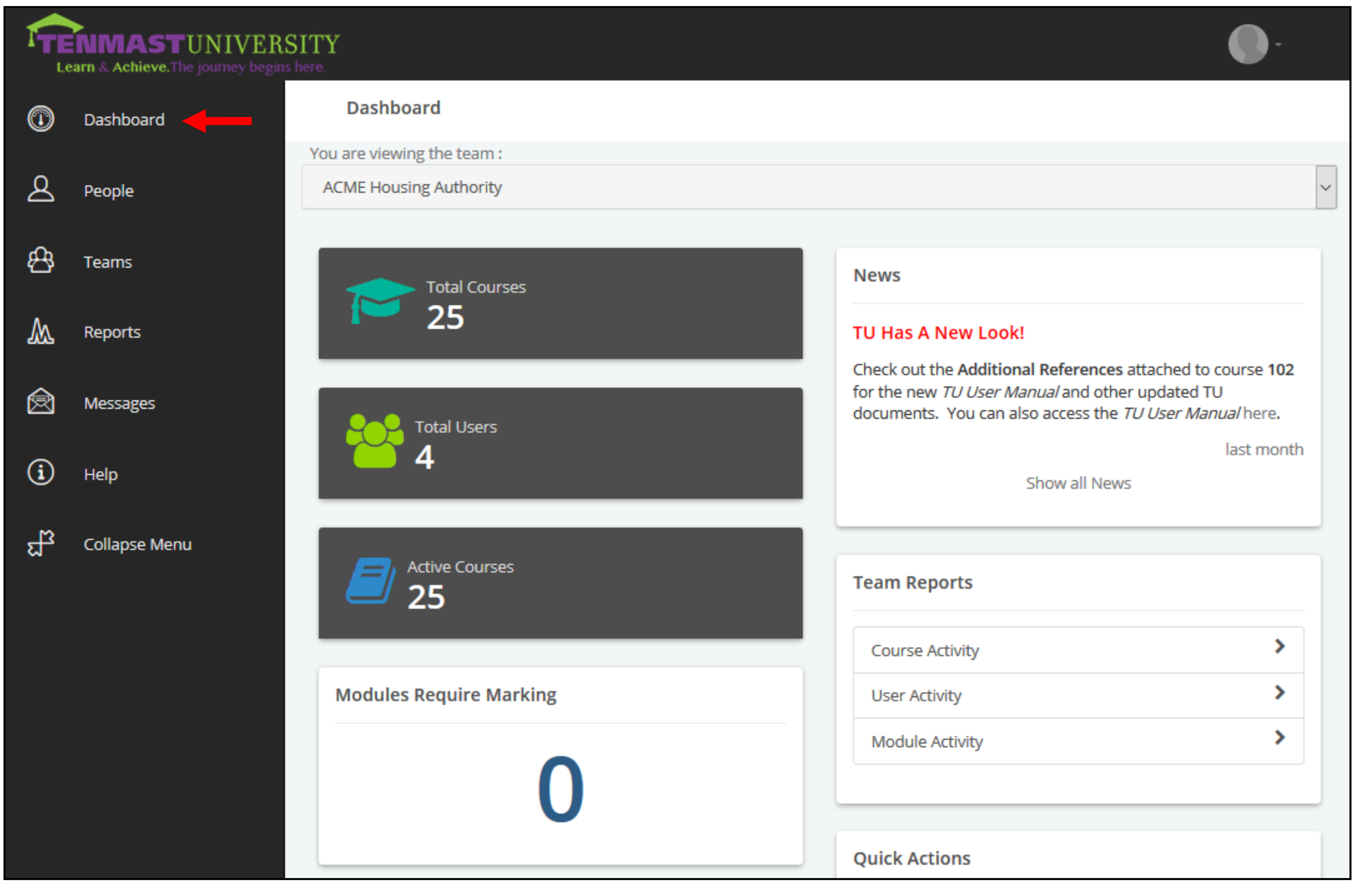
If you want to designate someone at your agency to be a Team Leader, please submit a support case through the **myMRI Client Portal**.

Team Leader & Learner Views

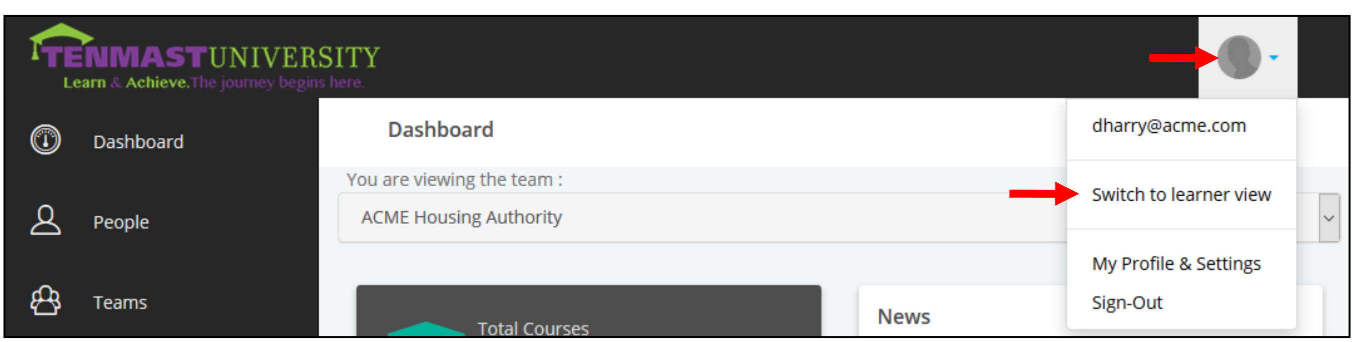
There are 2 application views used by TU Team Leaders:

- **Admin View** – This view provides access to all of the administrative functions you might perform as a Team Leader for your agency.
- **Learner View** – This view provides access for completing courses that have been assigned to you. This is the standard view that all general TU users see. Since most Team Leaders have been assigned courses to complete also, they are general users as well.

When Team Leaders login to TU, the application opens in **Admin View** with the **Dashboard** as the default screen. The Dashboard displays current information about your agency's TU account, such as total number of courses and users. If you navigate away from the **Dashboard**, you can return anytime by selecting the **Dashboard** menu.



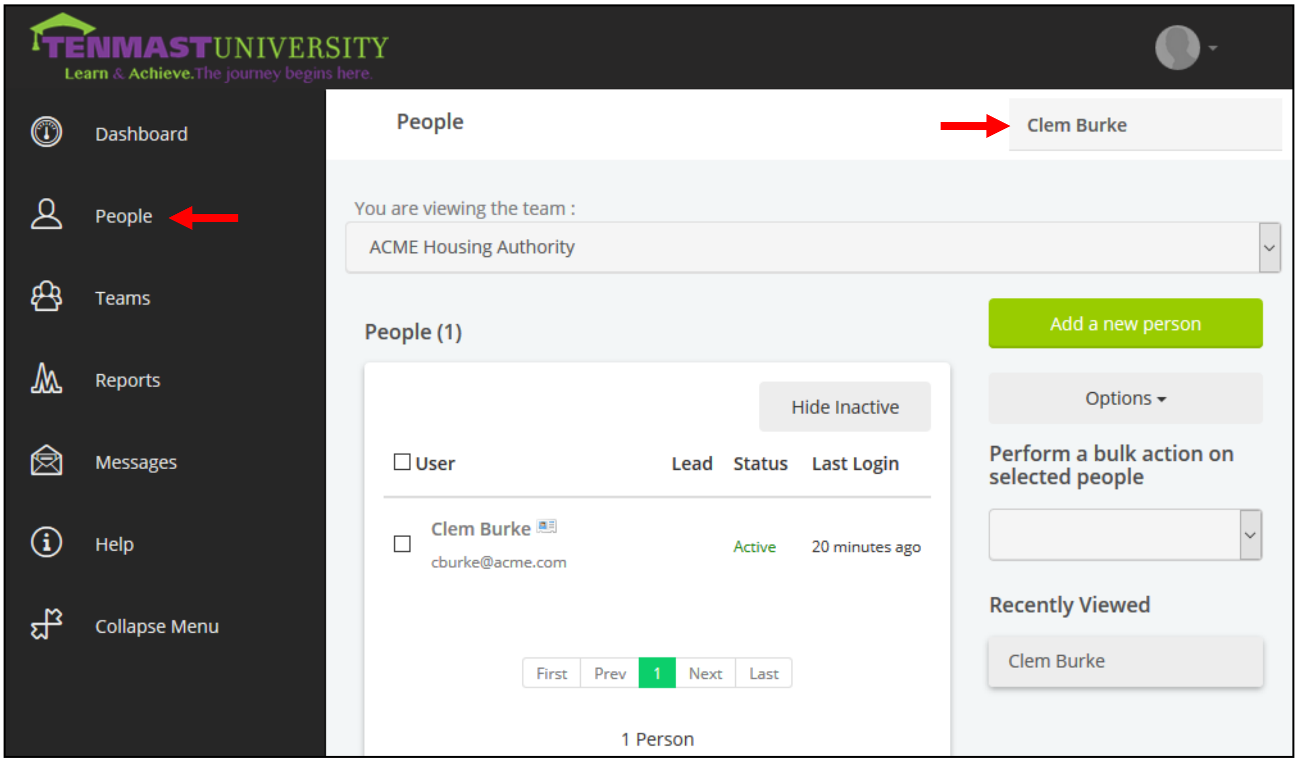
To toggle between **Admin View** and **Learner View**, click the Profile button at the top right and select **Switch to learner view** or **Switch to admin view**.



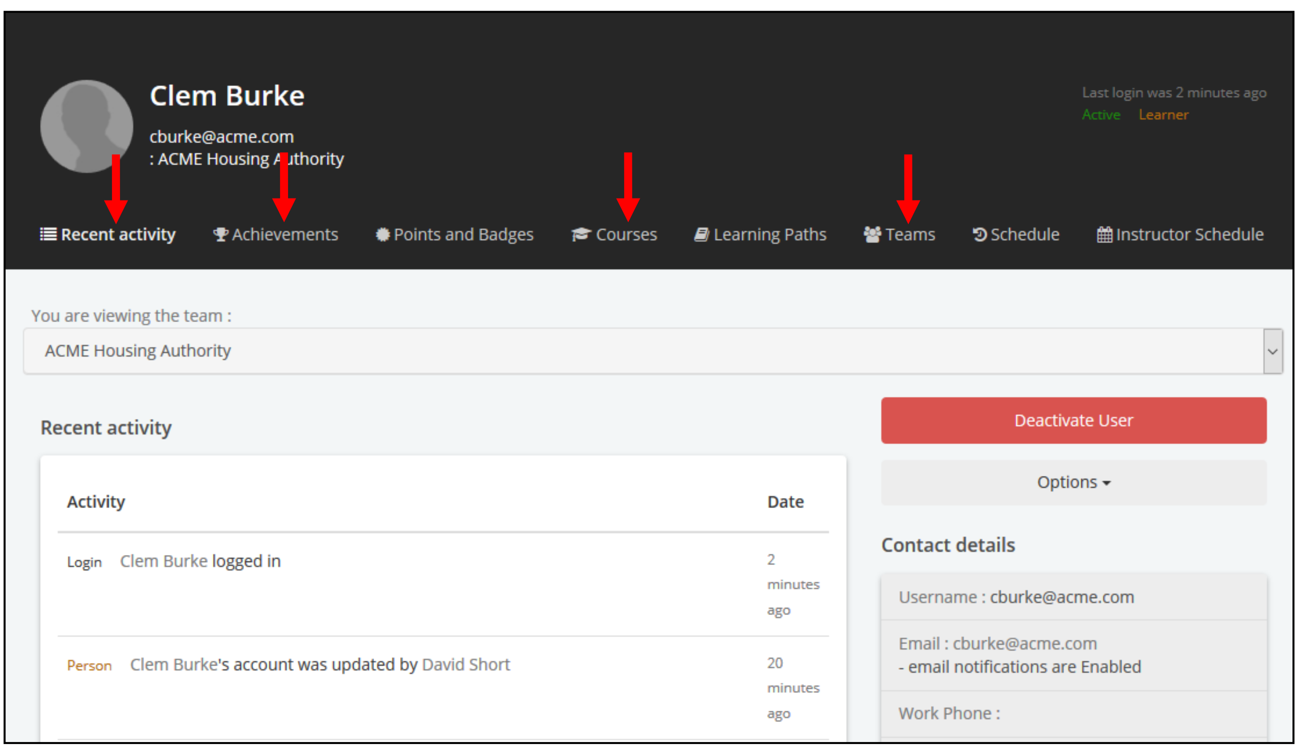
Users

View Users

1 Select the **People** menu to display a list of all users at your agency. To find a specific user, enter the user's name in the search box.



2 Select the user's name. The **Recent activity** tab is selected by default, showing the user's recent logins, course completions and other TU usage information. Select other tabs to display items such as courses completed (**Achievements**), courses assigned (**Courses**) and teams to which the user is assigned (**Teams**).

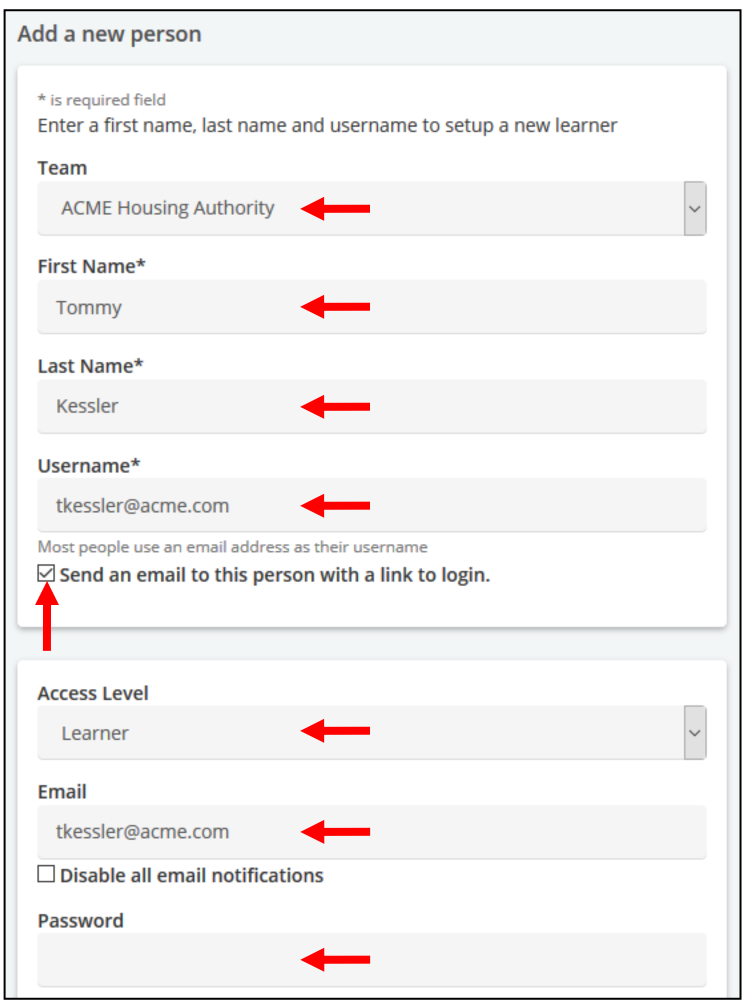


Add Users

All new users should be added to your agency's basic team, which assigns them basic 100 and 200 level courses. Once created, users can then be added to additional sub teams to match their roles at the agency. Follow these instructions to create new users within your basic team.

1 Select the **People** menu and click the Add a new person button on the right.

2 Complete the following fields on the form:
Team: Choose the name of your agency from the drop-down list. Do not choose one of the sub teams, such as Accounting or Public Housing.
First Name: User's first name.
Last Name: User's last name.
Username: User's email address. When you save the record, TU verifies that the username does not already exist. If it already exists, a message stating *Username already taken* is displayed, preventing you from adding the user again.
Send an email…: Check this box so that TU automatically sends the user a welcome email with a link to login the first time and set a password.
Access Level: Choose *Learner* for general users or *Team Leader/Team Admin* for Team Leaders.
Email: User's email address.
Password: Leave blank.



3 If desired, you can enter other information such as **Title**, **Company**, or **Work Phone**. When finished, click the Add person button to the right of the form to add the user to TU.

Deactivate Users

In the event a user leaves your agency temporarily, such as for medical leave, you may deactivate the user's account. Deactivation prevents the user from logging into TU and removes them from your active roster, but TU retains their activity and course completion history. When the user returns to work, they can be reactivated. You can deactivate and reactivate users as many times as needed.

1 Select the **People** menu and select the user's name to open their record. Then click the Deactivate button on the right.

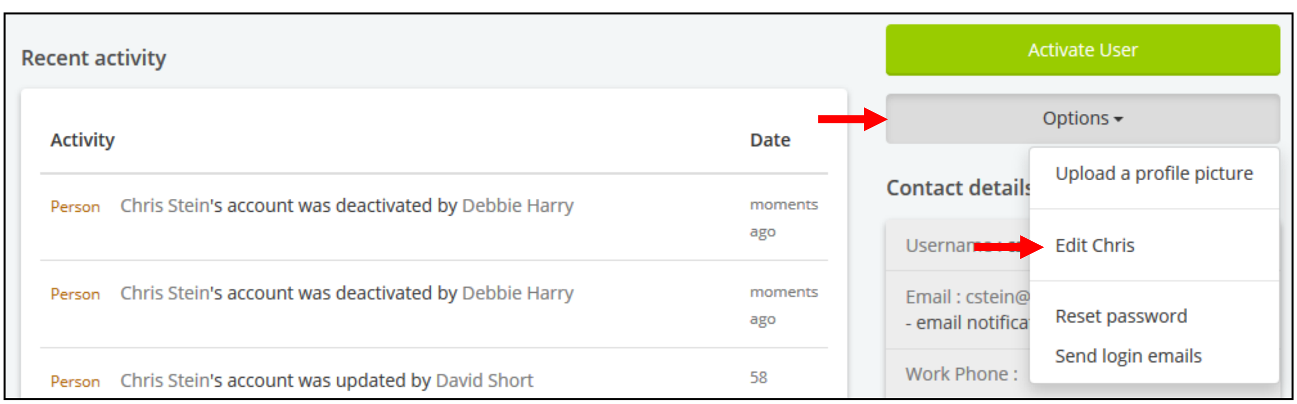
2 When the user returns to work, the account can be reactivated by clicking the Activate button on the right. The user's history will be retained.

Delete Users

When a user leaves your agency permanently, you can either deactivate or delete the account.

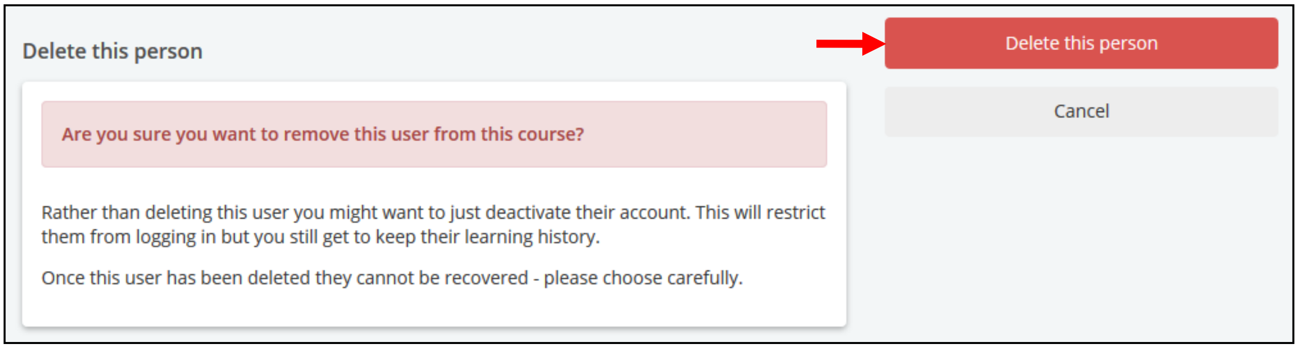
⚠ *Deletion removes the user and all associated learning history from TU. This data cannot be recovered!*

1 Select the **People** menu and select the user's name to open their record. Then click the Options button on the right and select the **Edit** link in the drop-down list.



2 The user's details are displayed. Click the Delete this person button on the right.

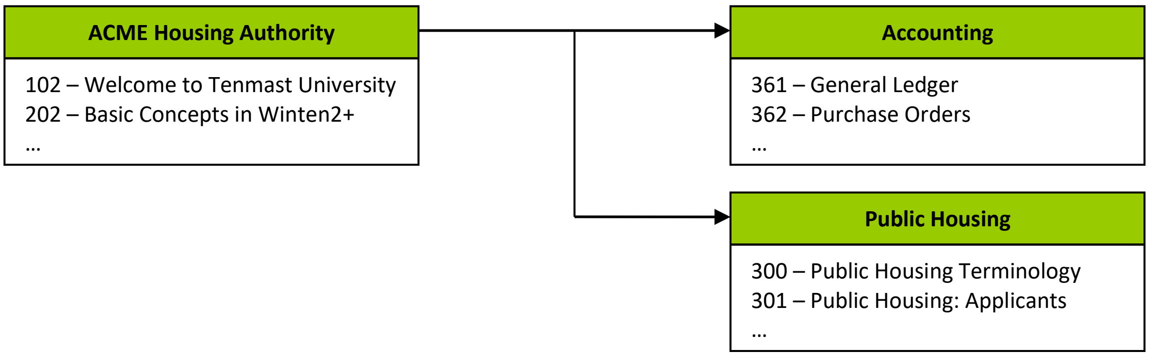
3 You will be prompted to confirm the deletion. Click the Delete this person button.



Teams

TU users and courses are arranged by teams. This makes the process of assigning courses to users much more efficient.

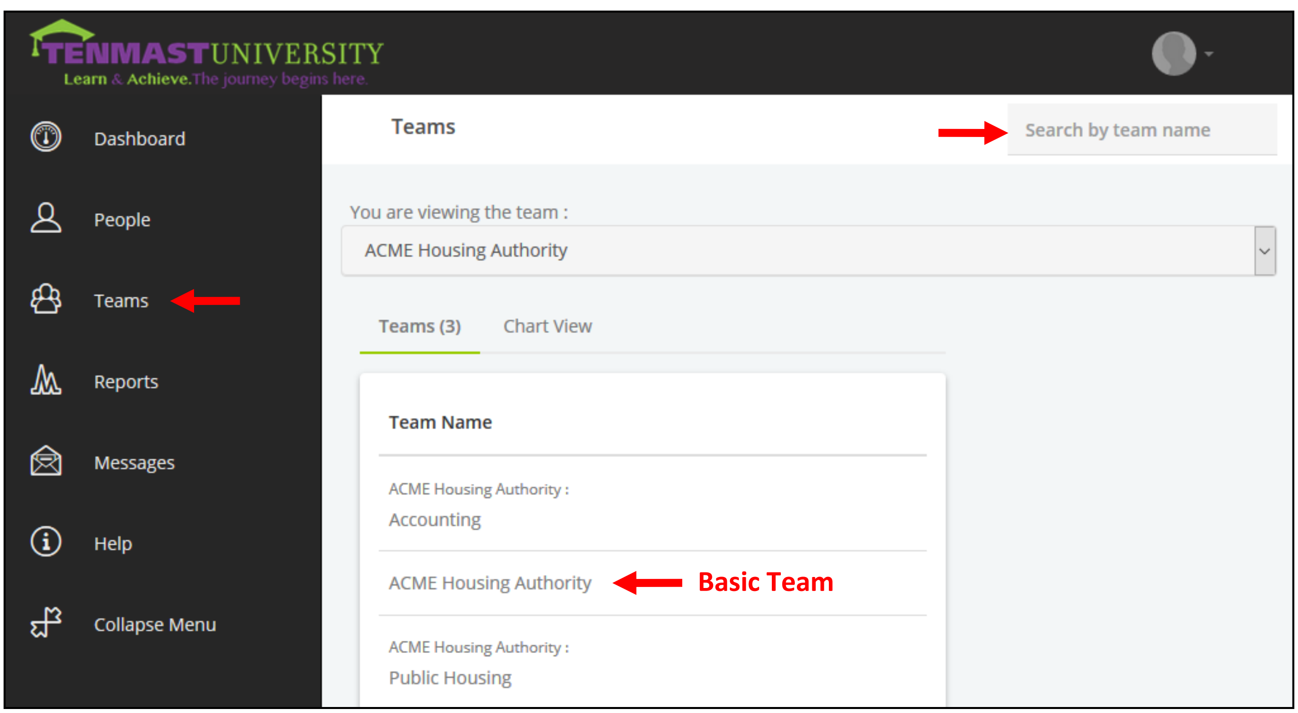
Your agency has a *basic* team, which is named the same as your agency name. Basic 100 and 200 level courses are assigned to this team. You may also have agency-specific *sub teams* such as Accounting and Public Housing. These sub teams were set up according to information you provided on the TU Enrollment Form you submitted to Tenmast. Relevant 300 and higher level courses are assigned to these sub teams.



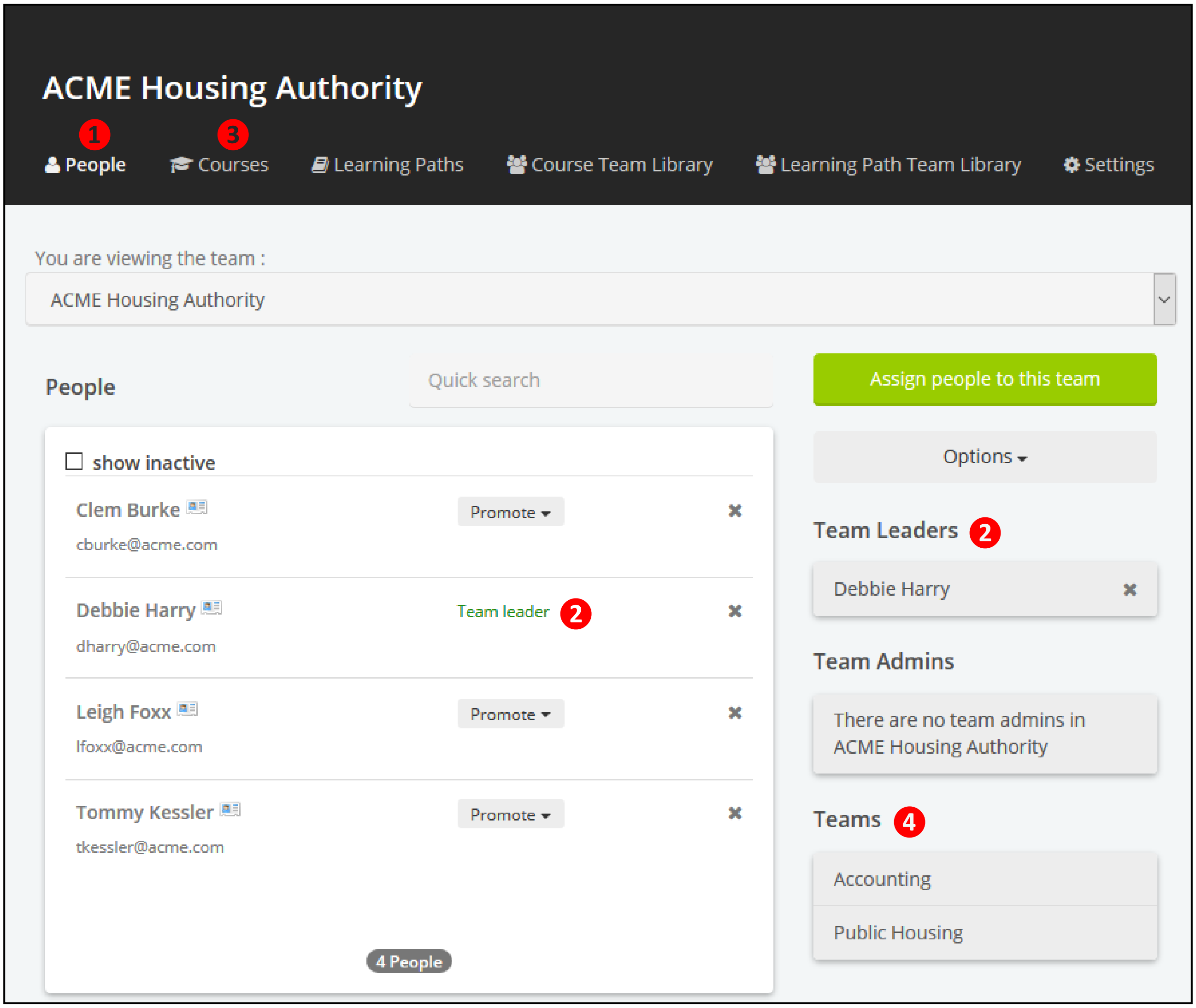
Your users are assigned to teams, causing them to inherit the courses assigned to those teams. All users at your agency are assigned to the basic team, since 100 and 200 level courses are required for all users. Only relevant users are assigned to sub teams depending on which roles they perform at your agency. Team assignments for your users were initially determined based upon your TU Enrollment Form.

View Teams

1 Select the **Teams** menu to display a list of all teams at your agency. To find a specific team, enter the team name in the search box. Note that your basic team is named after your agency. Select your basic team.



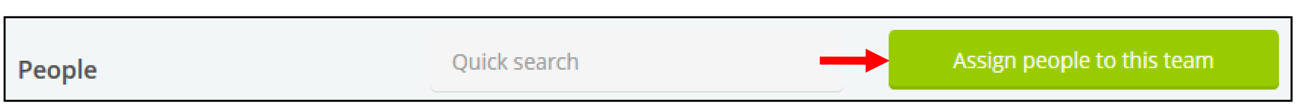
2 The team's details are displayed. The screen layout is described below:



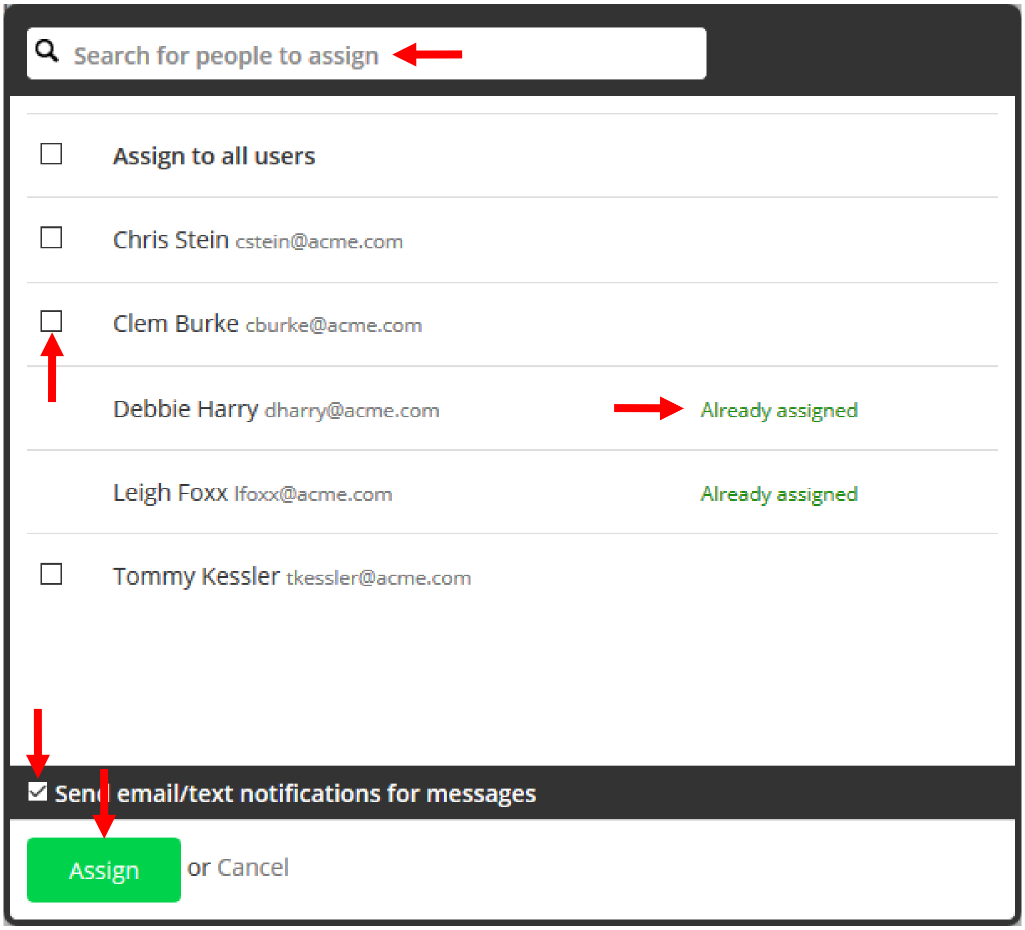
1. **People** – This tab is selected by default, showing all users assigned to this team, which should be all of your agency's users.
2. **Team Leaders** – Users assigned as Team Leaders are listed in the **Team Leaders** panel on the right. They also have a green **Team leader** tag beside their name in the user list.
3. **Courses** – Select this tab to view all courses assigned to this team.
4. **Sub Teams** – Your agency's sub teams are listed in the **Teams** panel on the right. To view users and courses assigned to a sub team, select the sub team's name in the panel.

Assign Users To Teams

1 Select the **Teams** menu and select the team's name to open it. Then click the Assign people to this team button.



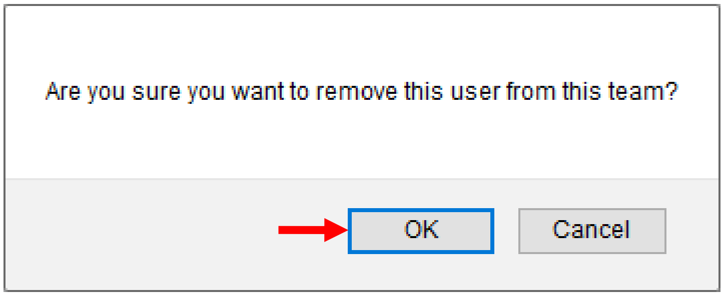
2 Check the box beside the users you want to add to this team. Users already assigned to the team have a green **Already assigned** tag beside the user's name. To find a specific user, enter the user's name in the search box. To automatically send an email to the users notifying them of the new assignment, check the **Send email** box. When finished, click the Assign button. All courses assigned to this team will automatically be assigned to the selected users.



Unassign Users From Teams

1 Select the **Teams** menu and select the team's name to open it. Then click the **X** to the right of the user's name.

2 You will be asked to confirm the removal. Click the OK button. All courses assigned to this team will automatically be unassigned from the user. Any courses or modules under this team that were already completed by the user will be retained in the user's completion history.

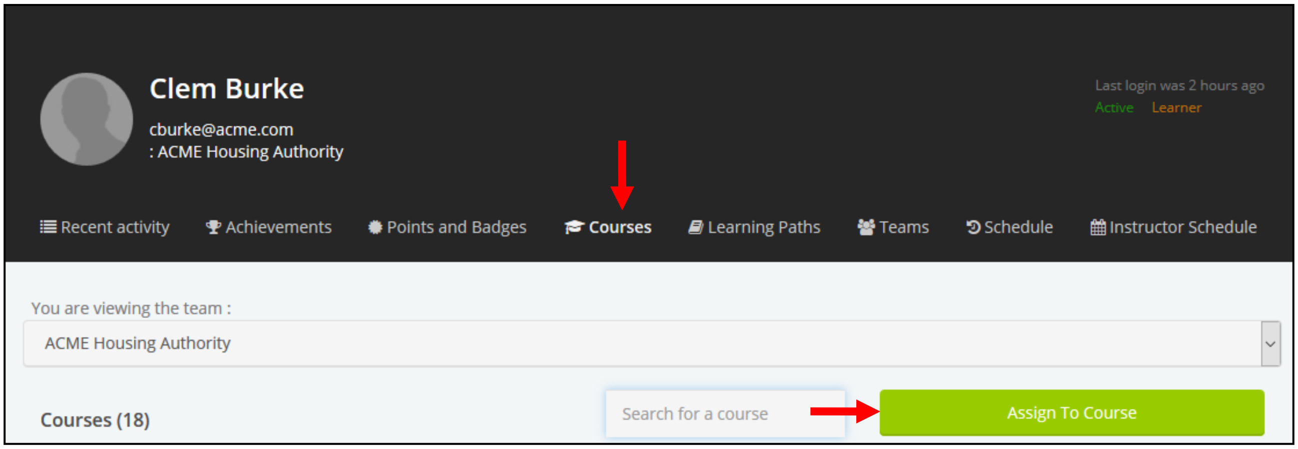


Courses

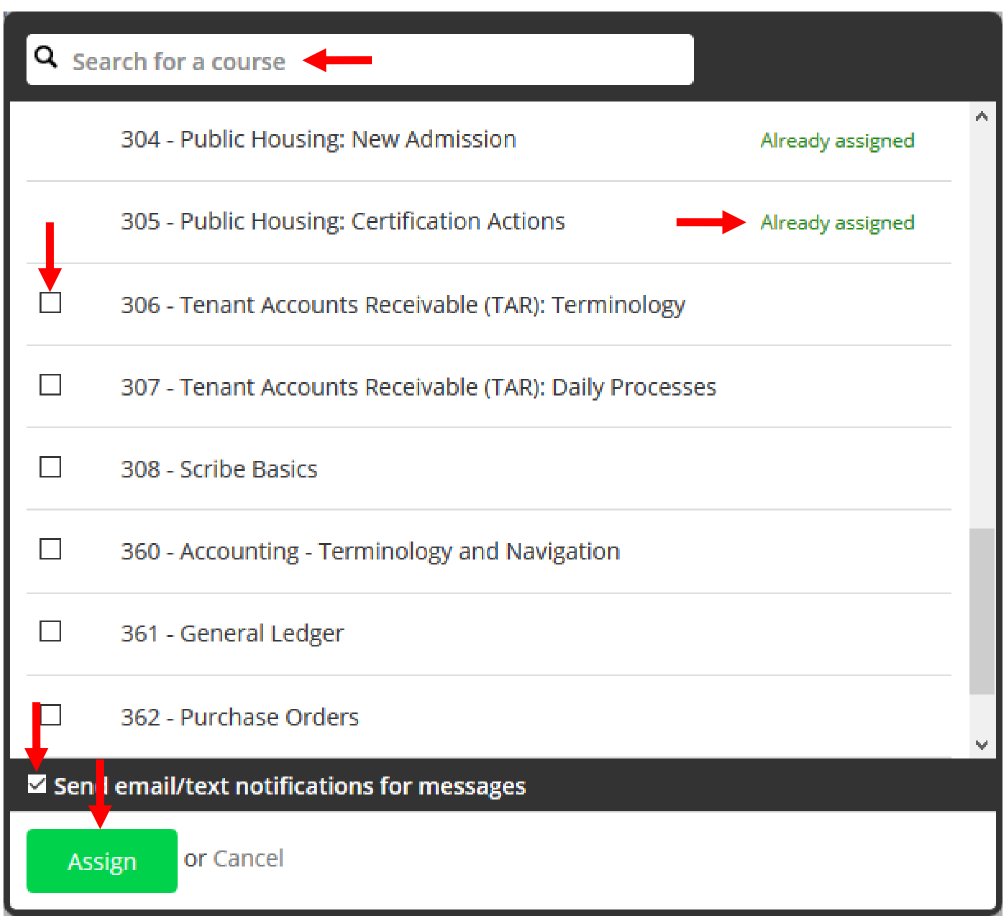
Assign Courses To Users

Team Leaders can assign individual courses to their agency's users, but only if the course has been assigned to the Team Leader as well.

1 Select the **People** menu and select the user's name to open their record. Select the **Courses** tab, then click the Assign To Course button on the right.



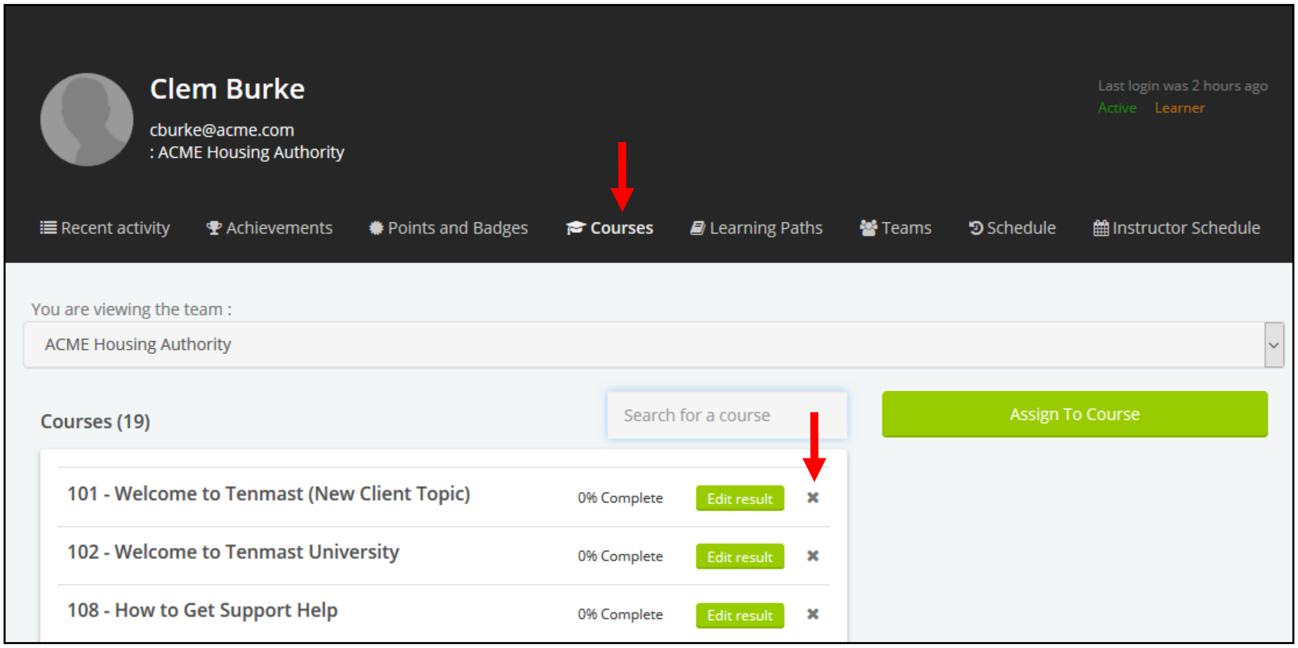
2 Check the box beside the courses you want to assign to this user. Courses already assigned to the user have a green **Already assigned** tag beside the course name. To find a specific course, enter the course number in the search box. To automatically send an email to the user notifying them of the new assignment, check the **Send email** box. When finished, click the Assign button.



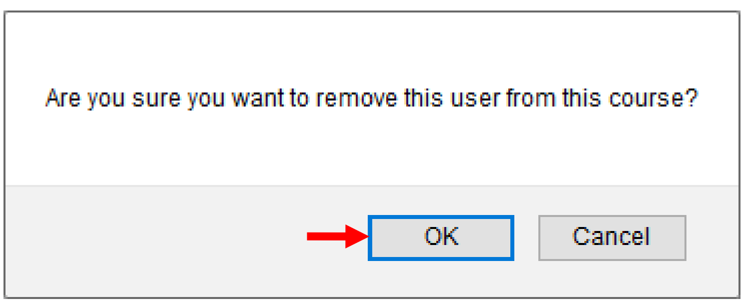
Unassign Courses From Users

Team Leaders can unassign individual courses from their agency's users, but only if the course was assigned individually and not inherited through a team assignment.

1 Select the **People** menu and select the user's name to open their record. Select the **Courses** tab and click the **X** to the right of the course to be unassigned.



2 If the course was not inherited through a team assignment, you will see the following confirmation. Click OK to remove the course.



3 If the course was inherited through a team, you will see the following warning and will not be able to unassign the course.

Reports

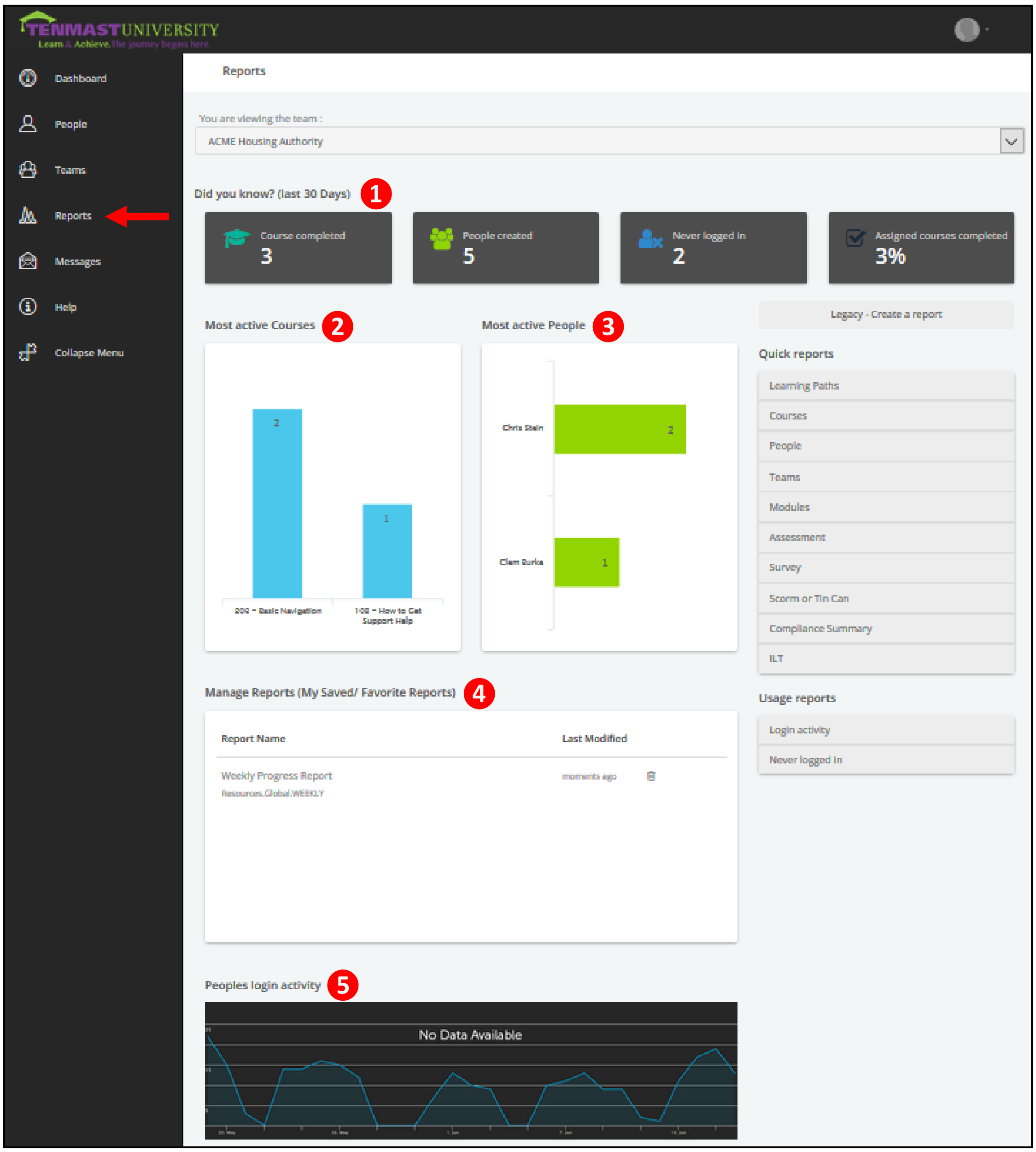
There are 2 types of reports available in TU:

- **Legacy** – These are pre-defined, modifiable reports that display course completion statistics. This type of report is used for creating weekly progress reports for your agency's users.
- **Pre-Defined** – These provide quick reporting on topics such as courses, users, teams, modules and login activity.

This manual describes how to create a sample report for each of the above types. It is not possible to cover *all* of the reporting features available to you. You should experiment with the various types of reports and their criteria to learn more about reporting capabilities in TU.

Reports Screen

When you select the **Reports** menu, the screen displays a dashboard of reporting data:



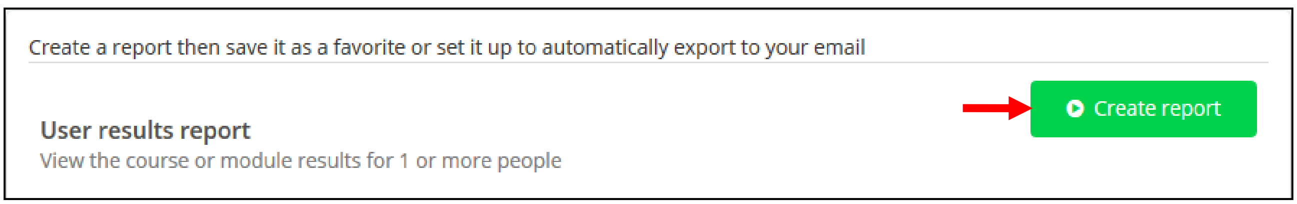
1. **30-Day Statistics** – Counts of activity that has occurred within the last 30 days, including courses completed, users created, users that have never logged in, and assigned courses completed.
2. **Most Active Courses** – A graph of your most active courses.
3. **Most Active Users** – A graph of your most active users.
4. **Scheduled Reports** – A list of all currently scheduled reports you have created.
5. **Login Activity** – A chart of user login activity.

Create Legacy Reports

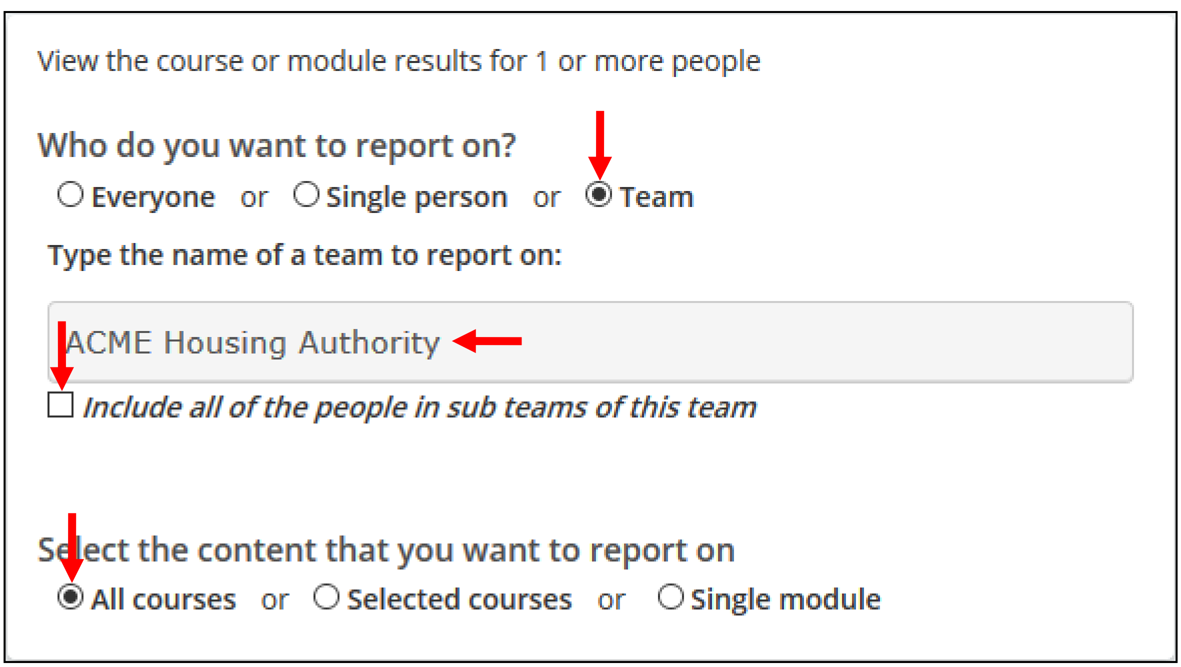
When your agency was preparing to go live on Winten2+, a report was emailed to you every Monday showing the course completion status of your users. The report was discontinued after go-live. If you would like to continue receiving this report, you can easily recreate it yourself.

1 Select the **Reports** menu, then click the Legacy – Create a report button on the right.

2 Click the Create report button to the right of **User results report**.

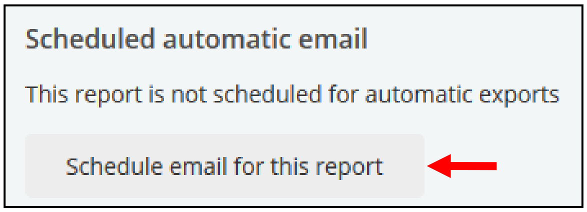


3 Choose the **Team** option. Start typing your agency's name in the search box. A drop-down list will appear, displaying your basic and sub teams. Select your basic team from the list. Uncheck the **Include all of the people in sub teams of this team** box. Then choose the **All courses** option at the bottom.

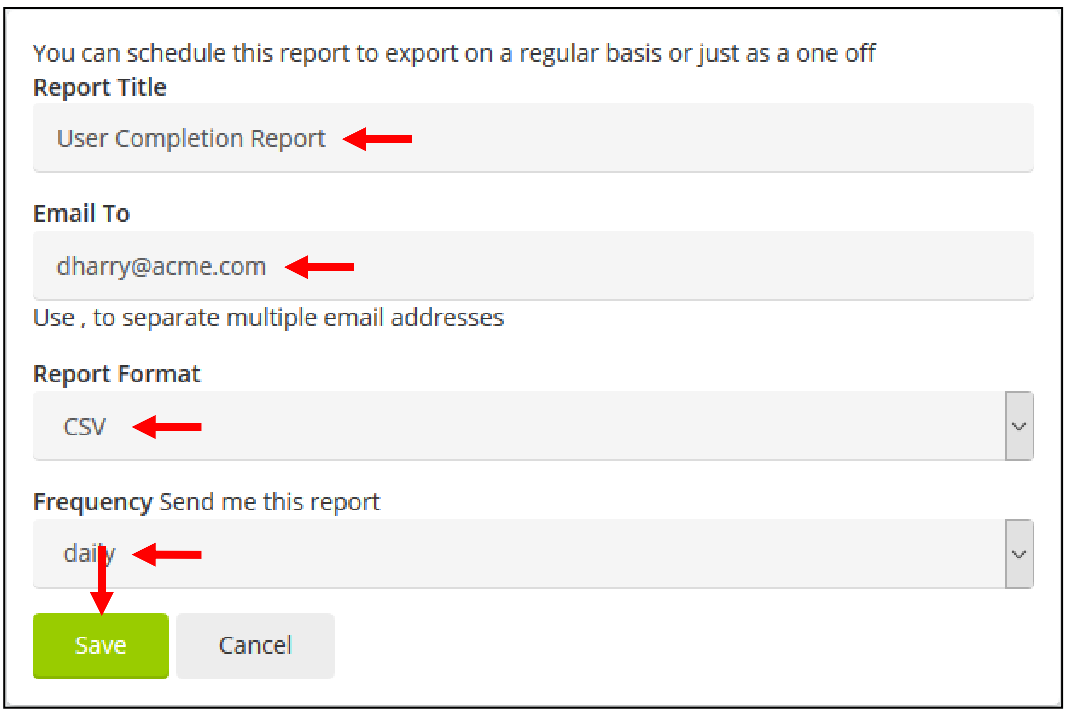


4 Click the Run report button on the right. Results are displayed on the screen.

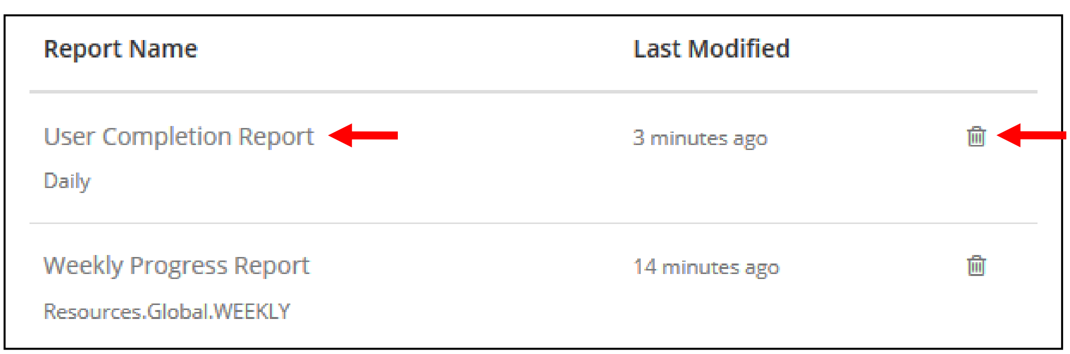
5 Click the Schedule email for this report button on the right.



6 Enter or select the following, then click the Save button.
Report Title: This title appears in the subject of emails.
Email To: Email addresses of all agency staff who should receive the report.
Report Format: *CSV*
Frequency: Choose the desired frequency.



7 The scheduled report now appears in the **Manage Reports** section on the **Reports** screen. If you want to delete the report, click the trashcan icon to the right of it.



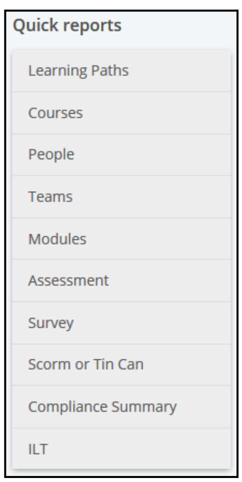
Report Name	Last Modified
User Completion Report Daily	3 minutes ago
Weekly Progress Report Resources.Global.WEEKLY	14 minutes ago

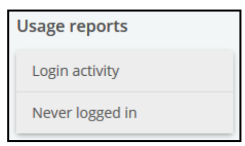
8 On the frequency you chose for the report, an email will be sent to the recipients you specified. The report is attached to the email as an Excel file similar to the one below.

	A	B	C	D	E	F
1	Trainee Name	First Name	Last Name	Course	Completed	% Complete
2	David Short	David	Short	201 - Accessing Your WinTen2+ Database	Yes	100
3	David Short	David	Short	202 - Basic Concepts in WinTen 2+	Yes	100
4	David Short	David	Short	203 - Basic Navigation	No	50
5	David Short	David	Short	204 - Cycle of Information	No	76
6	David Short	David	Short	205 - Common Icons and Keyboard Shortcuts	No	80
7	David Short	David	Short	206 - Terminology	Yes	100
8	David Short	David	Short	207 - Tips and Tricks	Yes	100
9	David Short	David	Short	208 - Basic Reporting	No	0
10	David Short	David	Short	210 - Basic Calendaring	No	0
11	Lisa Connors	Lisa	Connors	306 - Tenant Accounts Receivable (TAR): Terminology	Yes	100
12	Lisa Connors	Lisa	Connors	307 - Tenant Accounts Receivable (TAR): Daily Processes	Yes	100
13	Lisa Connors	Lisa	Connors	308 - Scribe Basics	Yes	100
14	Lisa Connors	Lisa	Connors	360 - Accounting - Terminology and Navigation	Yes	100
15	Lisa Connors	Lisa	Connors	361 - General Ledger	No	45
16	Lisa Connors	Lisa	Connors	362 - Purchase Orders	No	28
17	Lisa Connors	Lisa	Connors	363 - Accounts Payable	No	25
18	Lisa Connors	Lisa	Connors	364 - Fixed Assets	No	0
19	Lisa Connors	Lisa	Connors	365 - Payroll	No	0

Create Pre-Defined Reports

On the right panel of the **Reports** dashboard screen are links to several pre-defined reports. Some of the most commonly used reports are described below. Each report allows you to drill down to see more details for each line item on the report.

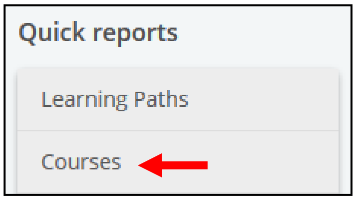




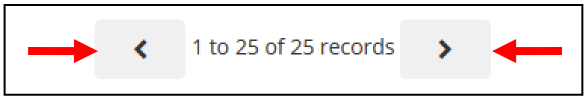
- **Courses** – Displays all courses assigned to your agency's teams, the total number of users assigned to each course, and the total number of users who have completed each one.
- **People** – Displays all users at your agency, the total number of courses assigned to each user, and their overall completion status.
- **Teams** – Displays all of your agency's teams, the total number of users and courses assigned to each team, and the total number of users who have made progress within each team.
- **Login activity** – Displays the last TU login date for every user at your agency.
- **Never logged in** – Displays all users at your agency who have never logged in to TU.

Follow these instructions to create and schedule a pre-defined report. This example uses the **Courses** report.

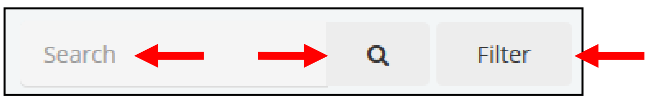
1 Select the **Reports** menu, then select **Courses** in the **Quick reports** panel on the right.



2 Results are displayed on the screen with toolbars at the top and bottom. If there are more records than can be displayed on one screen, click the < and > buttons at the bottom to navigate the records.

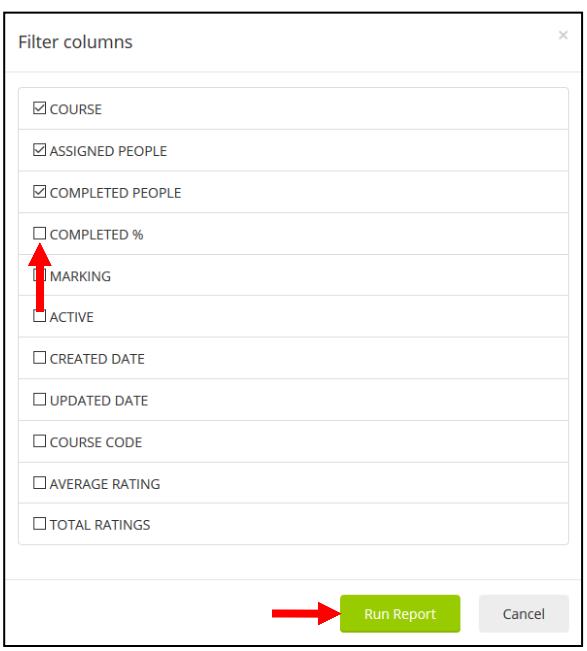


3 To search for a specific record in the results, enter a keyword in the search box at the top and click the magnifying glass button. To filter the results, click the Filter button and select the desired criteria.

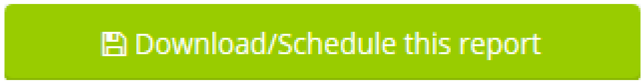


4 Each report displays certain columns by default. To add other columns to the report or remove existing columns, click the column chooser button.

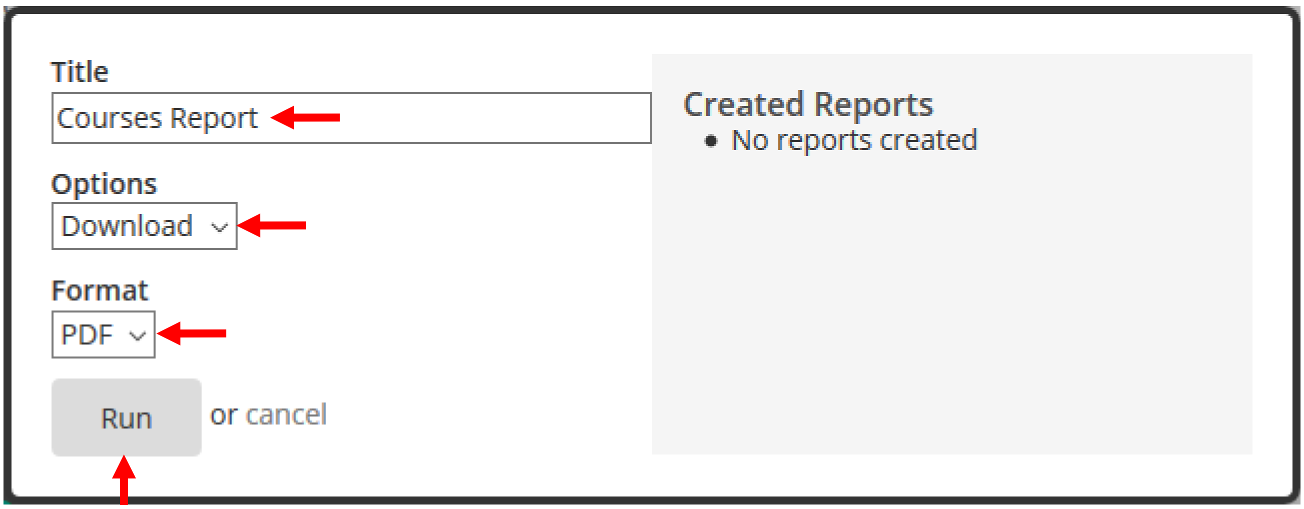
A column chooser box appears. Add or remove columns by checking and unchecking the boxes, then click the Run Report button to refresh the report on the screen.



5 To download or schedule the report for email delivery, click the Download/Schedule this report button on the right.



6 Enter the following information about the report, then click the Run button to generate it.
Title: Report title.
Options: Choose *Download* to create a downloadable report now, or choose *Schedule* to have it emailed on a specified frequency. If you choose *Schedule*, **Email To** and **Frequency** boxes are displayed. Enter one or more email addresses (separated by commas) in the **Email To** box. Then choose the desired **Frequency**.
Format: Choose *PDF* or *CSV* (Excel).



7 If you chose to download the report, it will display in the **Created Reports** panel. Select the file name to view and/or save the file.

8 If you chose to schedule the report, it now appears in the **Manage Reports** section on the **Reports** screen. If you want to delete the report, click the trashcan icon to the right of it.