



Instruction Guide to Navigating the **Traliant Learning Center**

We provide our clients with an LMS, the **Traliant Learning Center**, specially designed for use in assigning, monitoring, and reporting on compliance training. This Instruction Guide is designed to help you get up and running as smoothly as possible on the TLC.

Access the LMS

<https://lms.traliant.com>

[Click here for Traliant Support
and FAQ's](#)

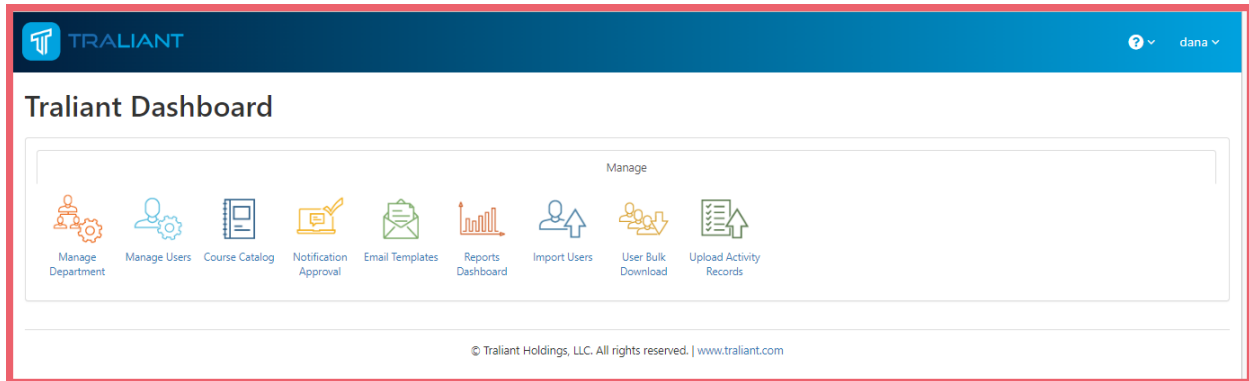
Contents

The Traliant Learning Center Dashboard	4
Guided Assistance	5
User Management	6
Adding a New User	6
Find Users	10
Assign Courses to Users	10
Sharing Electives	20
Notification Approval	22
Deactivate a User	23
Import Users (previously Uploading Users)	23
Downloading Users	29
Course Catalog	30
Default Rollout Configuration	30
Active, Unassignable, Hidden Courses	31
Downloading Course Completion Certificates	32
Resending Assignment and Reminder Notifications	33
Email Templates	34
Building a New Email Template	34
Sample Course Assignment Email	36
Sample Course Reminder Email	37
Sample Past Due Email	37
Reporting	38
Reporting Dashboard	38
Dashboard Overview	38
Pin your Filters	39
Viewing/Exporting Details	39
Assignments by Department	39
Assignments by Status	41
Completion Velocity	41
Top Course Assignments	42
Leaderboard	42

Completion Benchmark Report	43
Engagement Points Benchmark Report	43
Reporting Dashboard Customization.....	44
Automated Email Reports.....	46
Uploading Custom Courses.....	48
APPENDIX.....	51
Traliant LMS Admin Access Levels	51

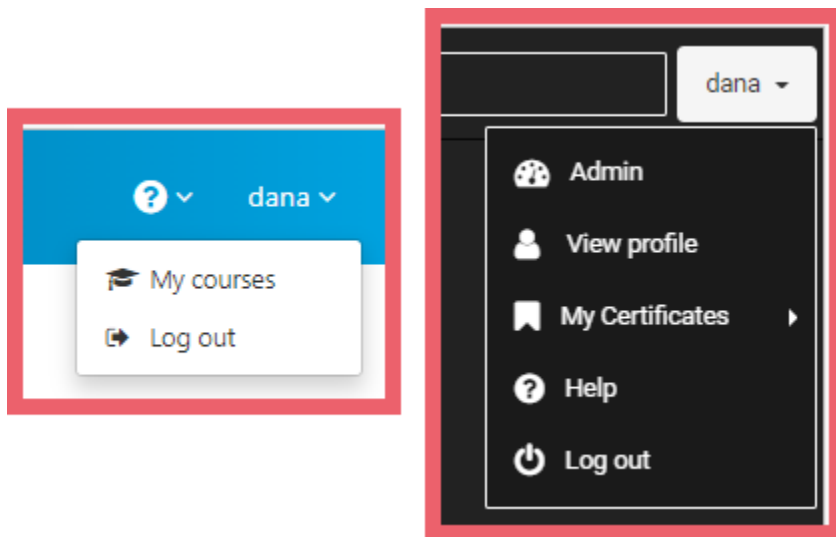
The Traliant Learning Center Dashboard

When logging in to the TLC as a Company Manager, Department Manager, or Reviewer*, you will first see the LMS Dashboard.



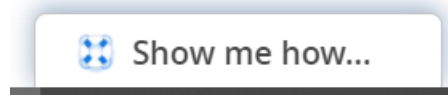
**icons may vary based on role*

Clicking in the upper right corner on your username will toggle between ADMIN and MY COURSES, where you can access your assigned courses.

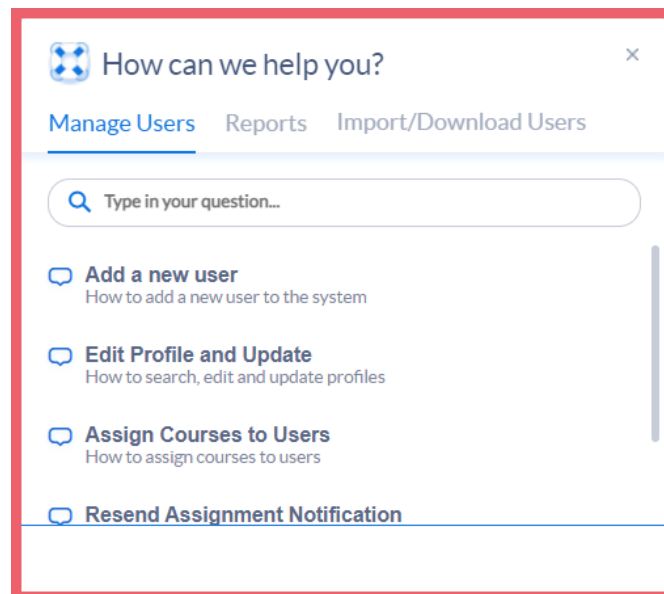


Guided Assistance

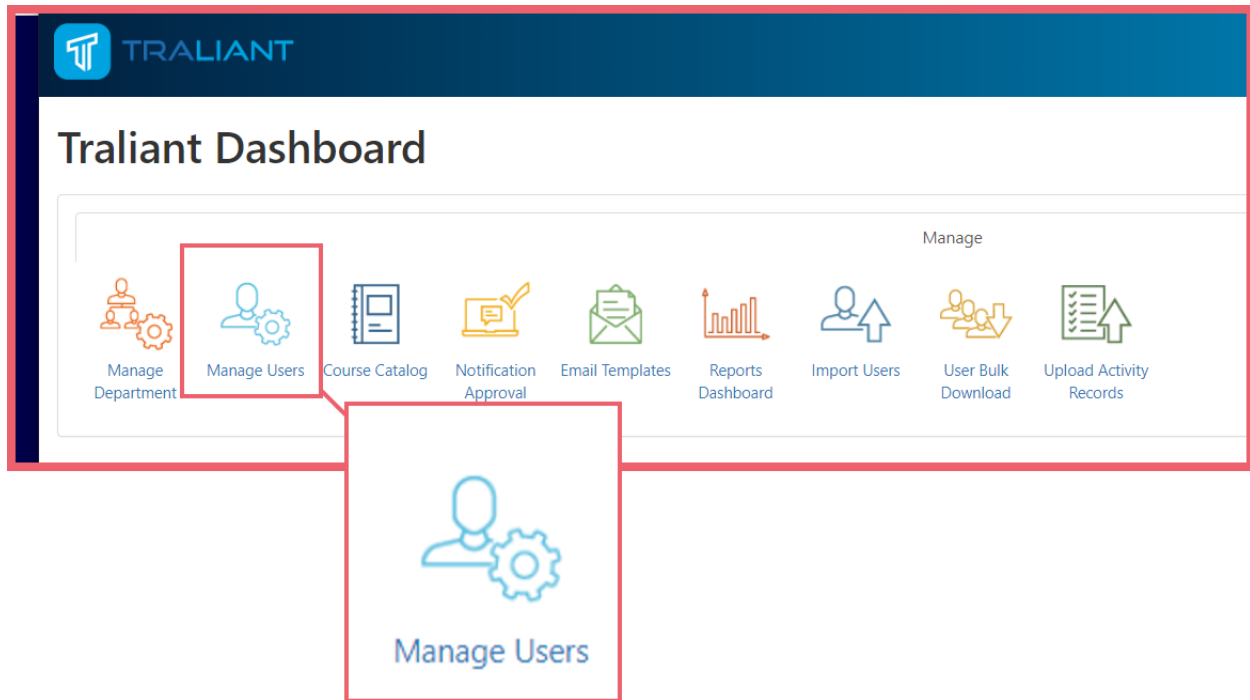
The TLC provides self-guided assistance that can be accessed from any area of the Administration screens. This tool will guide an administrator through some of our most often used functions, step by step. The tutorials can always be accessed by clicking on the icon at the bottom center of the screen:



Which will bring up the menu of options to assist with Managing users and assigning courses, Reporting, and Importing/Downloading user lists:

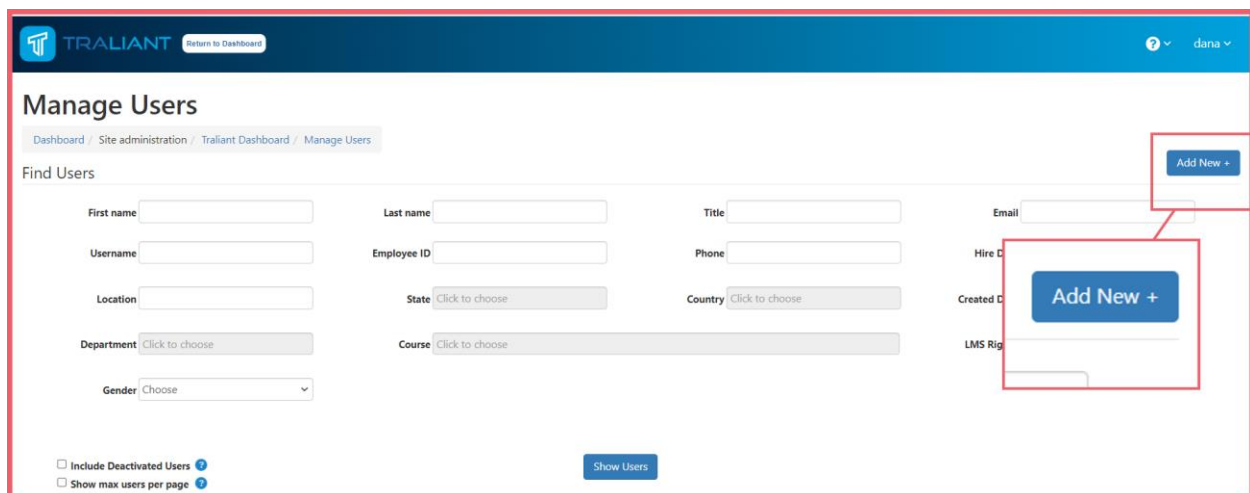


User Management

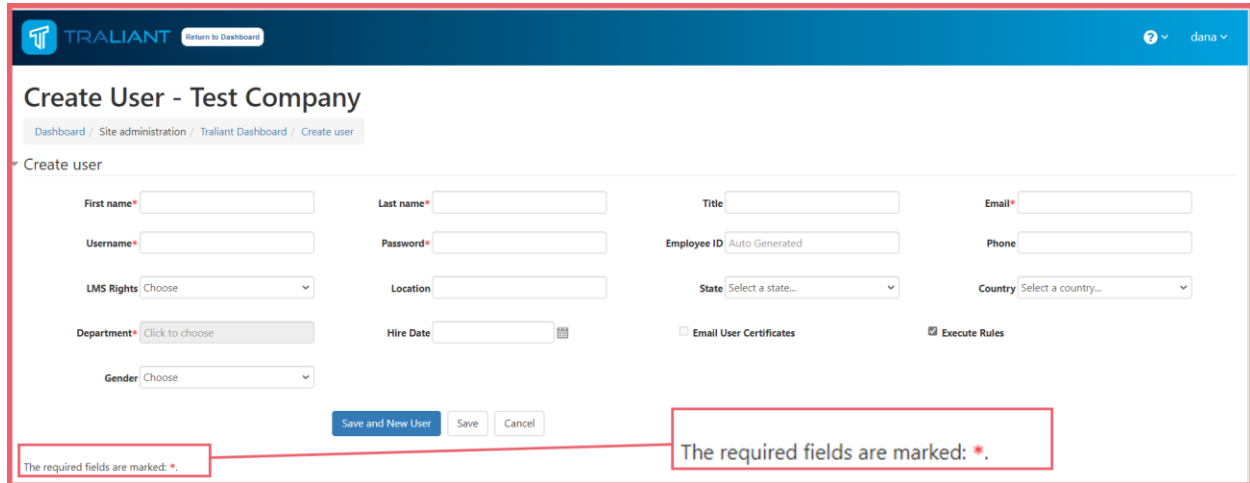


Adding a New User

To add a new user, click Add New in the upper right corner on the Manage Users screen.



Fill in the fields – fields marked with a red asterisk are **required**. If adding multiple users, select “Save and New User,” if only submitting one User, click “Save”



Create User - Test Company

Dashboard / Site administration / Traliant Dashboard / Create user

Create user

First name* Last name* Title Email*

Username* Password* Employee ID Auto Generated Phone

LMS Rights Choose Location State Select a state... Country Select a country...

Department* Click to choose Hire Date ☐ Email User Certificates ☒ Execute Rules

Gender Choose

Save and New User Save Cancel

The required fields are marked: *

(continue to required fields grid)

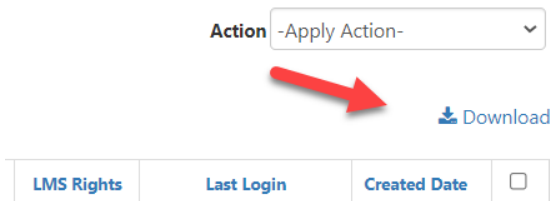
[Click here](#) to access the user upload template.

Field	Details
First Name	
Last Name	
Title	This field is used to filter for course assignment purposes (for some courses) and will reflect the course to be assigned. Typical value will be Employee or Manager.
Email	Every username must be associated with an email address. If the user does not have email, then a company HR, a manager, or alternate email may be user. Email value does not need to be unique.
Username	Username must be unique across Traliant's TLC system. It is recommended to use company email addresses when possible. If this is not possible, then a standard nomenclature will be determined. A standard format may reflect first.last_companyname
Password	Note that the password entered here must match the information that will be provided to your learners in the Assignment notification (email). Traliant standard default is Password@123 – this may be customized
Employee ID	This field may be left blank. If your organization uses true employee ID numbers, we can input these numbers here for reconciliation purposes.
Phone	This field may be left blank
LMS Admin Rights (click here for detail)	<p>This is a level of administrative rights within the Traliant LMS.</p> <p>STUDENT is the default for most users, providing no administrative rights in the LMS.</p> <p>COMPANY MANAGER provides overall administrative rights at the top level of the company, so, for all users within the company</p> <p>DEPARTMENT MANAGER provides admin rights within their assigned department</p> <p>REVIEWER provides view only rights in 'manage users' and 'reporting dashboard' for their assigned department.</p>

<i>continued</i>	
Location	
State	Select State from dropdown. For bulk upload, ok to use the 2 letter state abbreviation. This will allow for filtering for course assignment by states, especially for courses where there are specific state requirements
Country	Select Country from dropdown. For bulk upload, ok to use the 2 letter country abbreviation. This will allow for filtering for course assignment as needed.
Department	At a high level, the 'company name' will be the Department. A client may determine the level of hierarchy or breakdown required in their organization.

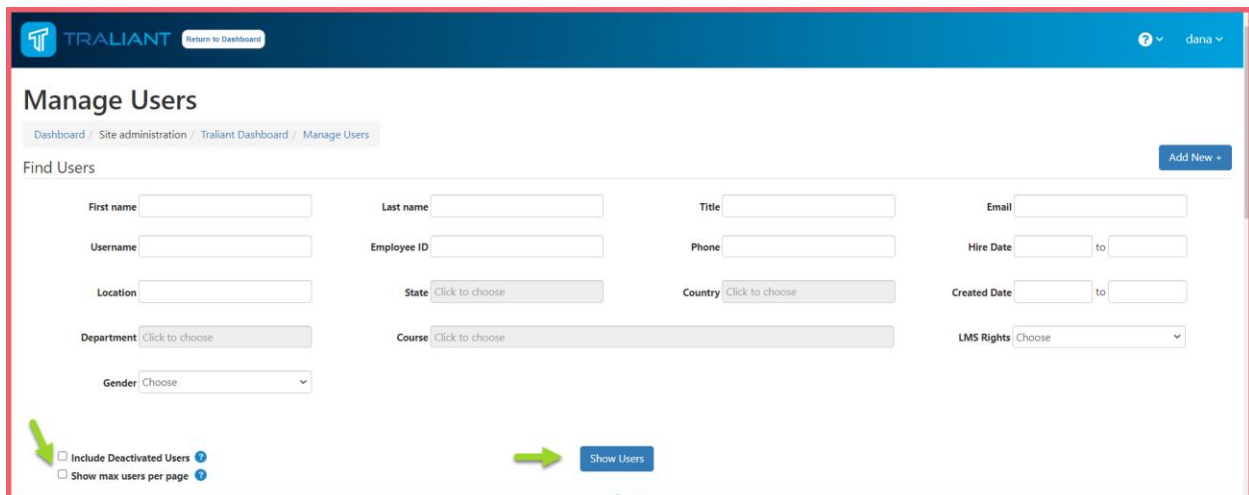
Find Users

In the Manage Users section, you can search for a user by their name (first or last or any portion or combination), email address, username, title, etc. You can search for a group by department, title, State, Country, etc. If you are looking to review a subset of names, you can enter the data into the fields and select SHOW USERS to search for that group, for example, Employee, in NY, and when the list is on screen, select download at the top of the grid to export the selected names to a csv file.



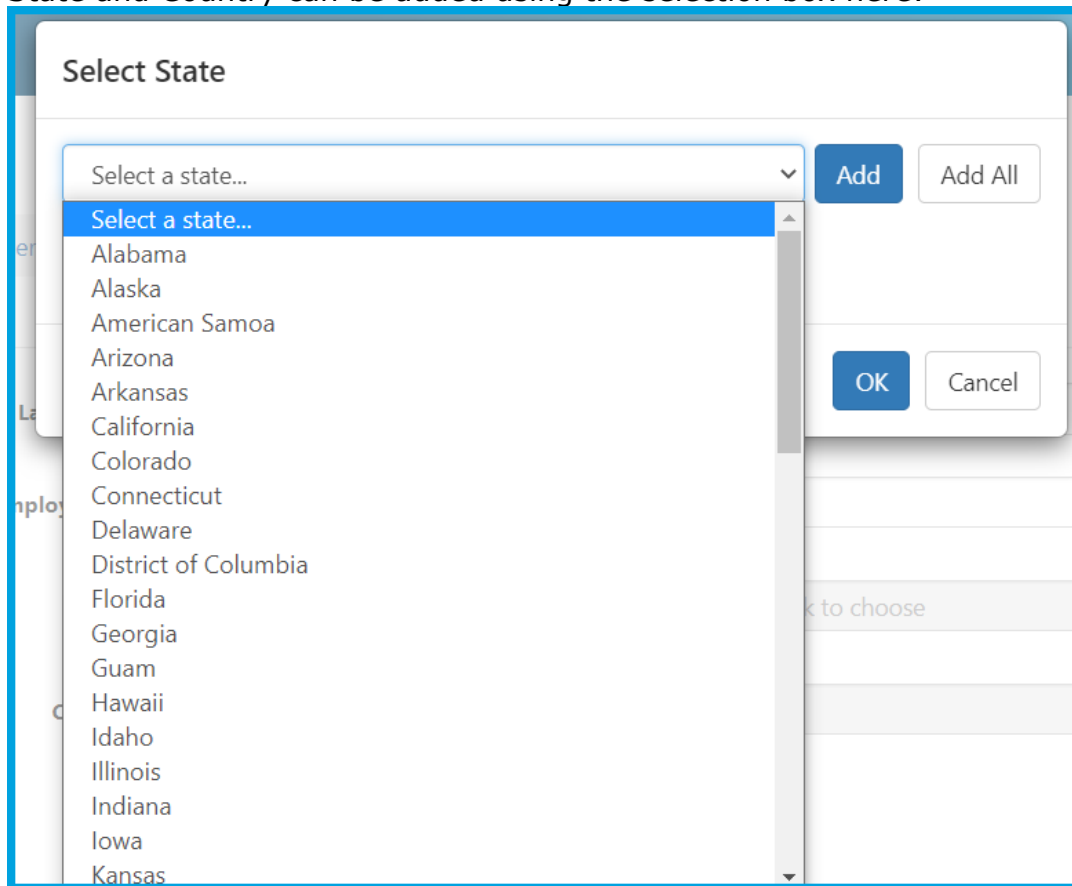
Assign Courses to Users

In the Dashboard, select Manage Users, and you will enter your search criteria to 'find' the users to which courses will be assigned.

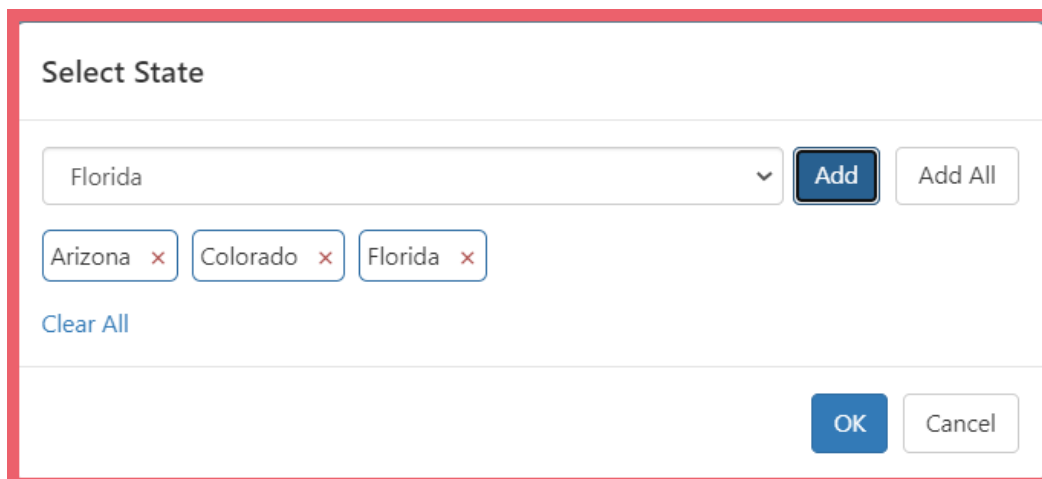


For example, type Employee in Title field to show all Employees. Continue to filter by adding State to find NY Employees. By default, the search will show 50 users on a page. If finding/assigning to more than 50 people, check the box for "Show max users in one page" and click "Show Users" again.

State and Country can be added using the selection box here:

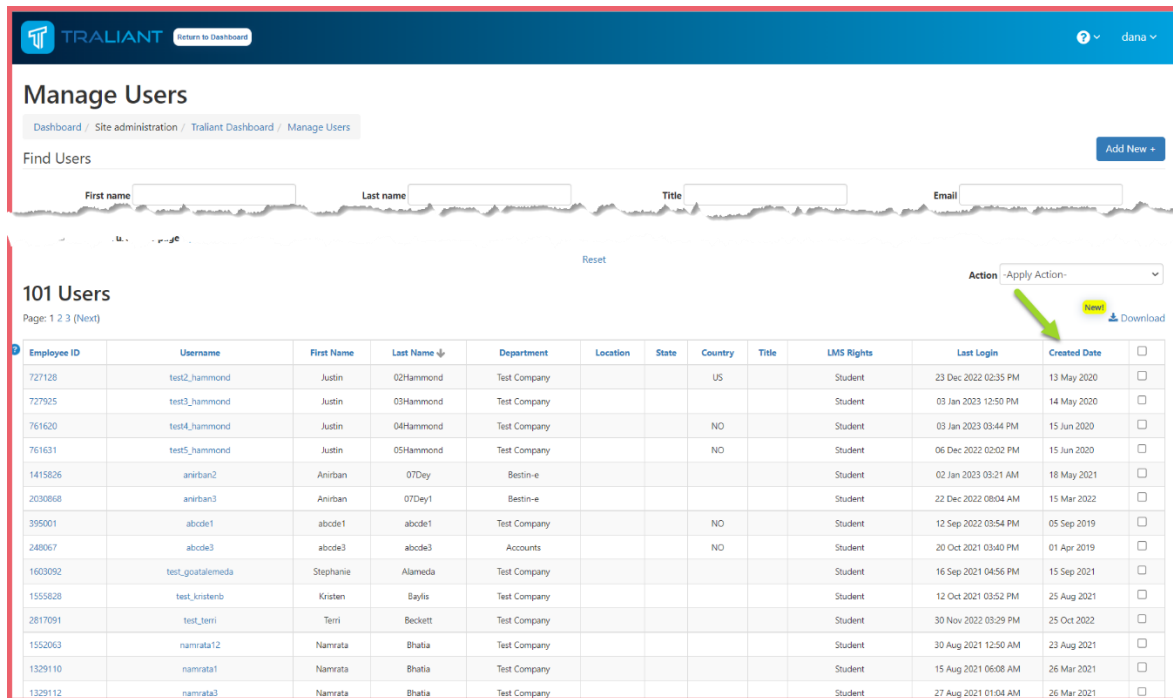


Select each desired state and click enter for multiple state/assignments. Alternatively, add ALL and remove those unwanted. Note that if states appear and there are no matching users, they will be ignored:



Same can be done for country.

Alternatively, you can click to sort by column heading, for example to find the most recently added names sort by created date, and the newest adds will appear at the top of the list, as shown below.



The screenshot shows the TRALIANT Manage Users interface. At the top, there's a navigation bar with the TRALIANT logo and a 'Return to Dashboard' button. Below this, the 'Manage Users' section is displayed, with a breadcrumb trail: Dashboard / Site administration / Trilant Dashboard / Manage Users. A search bar labeled 'Find Users' is present, with fields for First name, Last name, Title, and Email. A blue 'Add New' button is on the right. Below the search bar, a 'Reset' link is visible. The main content area shows '101 Users' and 'Page: 1 2 3 (Next)'. A table lists users with columns: Employee ID, Username, First Name, Last Name, Department, Location, State, Country, Title, LMS Rights, Last Login, and Created Date. The table is sorted by 'Created Date' in descending order. A green arrow points to the 'Action' dropdown menu, which has a 'Download' button next to it. The table data includes users like Justin Hammond, Anirban, Stephanie Alameda, Kristen Baylis, Terri Beckett, and Namrata Bhatia.

Employee ID	Username	First Name	Last Name	Department	Location	State	Country	Title	LMS Rights	Last Login	Created Date	
727128	test2_hammond	Justin	02Hammond	Test Company			US		Student	23 Dec 2022 02:35 PM	13 May 2020	<input type="checkbox"/>
727925	test3_hammond	Justin	03Hammond	Test Company					Student	03 Jan 2023 12:50 PM	14 May 2020	<input type="checkbox"/>
761620	test4_hammond	Justin	04Hammond	Test Company			NO		Student	03 Jan 2023 03:44 PM	15 Jun 2020	<input type="checkbox"/>
761631	test5_hammond	Justin	05Hammond	Test Company			NO		Student	06 Dec 2022 02:02 PM	15 Jun 2020	<input type="checkbox"/>
1415826	anirban2	Anirban	07Dey	Bestin-e					Student	02 Jan 2023 03:21 AM	18 May 2021	<input type="checkbox"/>
2030868	anirban3	Anirban	07Dey1	Bestin-e					Student	22 Dec 2022 08:04 AM	15 Mar 2022	<input type="checkbox"/>
395001	abcde1	abcde1	abcde1	Test Company			NO		Student	12 Sep 2022 03:54 PM	05 Sep 2019	<input type="checkbox"/>
248067	abcde3	abcde3	abcde3	Accounts			NO		Student	20 Oct 2021 03:40 PM	01 Apr 2019	<input type="checkbox"/>
1603092	test_goatalemeda	Stephanie	Alameda	Test Company					Student	16 Sep 2021 04:56 PM	15 Sep 2021	<input type="checkbox"/>
1555828	test_kristenb	Kristen	Baylis	Test Company					Student	12 Oct 2021 03:52 PM	25 Aug 2021	<input type="checkbox"/>
2817091	test_terri	Terri	Beckett	Test Company					Student	30 Nov 2022 03:29 PM	25 Oct 2022	<input type="checkbox"/>
1552063	namrata12	Namrata	Bhatia	Test Company					Student	30 Aug 2021 12:50 AM	23 Aug 2021	<input type="checkbox"/>
1329110	namrata1	Namrata	Bhatia	Test Company					Student	15 Aug 2021 06:08 AM	26 Mar 2021	<input type="checkbox"/>
1329112	namrata3	Namrata	Bhatia	Test Company					Student	27 Aug 2021 01:04 AM	26 Mar 2021	<input type="checkbox"/>


Check box next to each name (if a small subset) or click the box at the top of the grid to select all filtered names.

101 Users

Page: 1 2 3 (Next)

Employee ID	Username	First Name	Last Name
3043241	gbianchi@ensafe.com	Glen	Bianchi
3043240	fmcinturff@ensafe.com	Frank	McInturff
3010798	test-nicholas	Nicholas	Casciani
3003965	laura_test1	Laura	Test
2952497	laura_test	Laura	Test
2893538	test_andrea	Andrea	Foster-Mack
2874803	test_angelo	Angelo	Cianfroccoi
2842596	test2_ann	Ann	Lenora2
2817091	test_terri	Terri	Beckett
2817090	test_sara	Sara Jane	Simons
2778599	test_maggie	Maggie	Smith
2734134	test_allie	Allie	Miller

Action -Apply Action-

select users
New!  Download

Last Login	Created Date	
20 Dec 2022 02:38 PM	12 Dec 2022	<input type="checkbox"/>
16 Dec 2022 11:16 AM	12 Dec 2022	<input checked="" type="checkbox"/>
Never	06 Dec 2022	<input checked="" type="checkbox"/>
Never	05 Dec 2022	<input type="checkbox"/>
Never	21 Nov 2022	<input checked="" type="checkbox"/>
11 Nov 2022 12:06 PM	10 Nov 2022	<input type="checkbox"/>
11 Nov 2022 07:41 AM	07 Nov 2022	<input type="checkbox"/>
Never	31 Oct 2022	<input checked="" type="checkbox"/>
30 Nov 2022 03:29 PM	25 Oct 2022	<input type="checkbox"/>
23 Nov 2022 11:16 PM	25 Oct 2022	<input type="checkbox"/>
10 Nov 2022 10:07 AM	17 Oct 2022	<input type="checkbox"/>
Never	06 Oct 2022	<input type="checkbox"/>

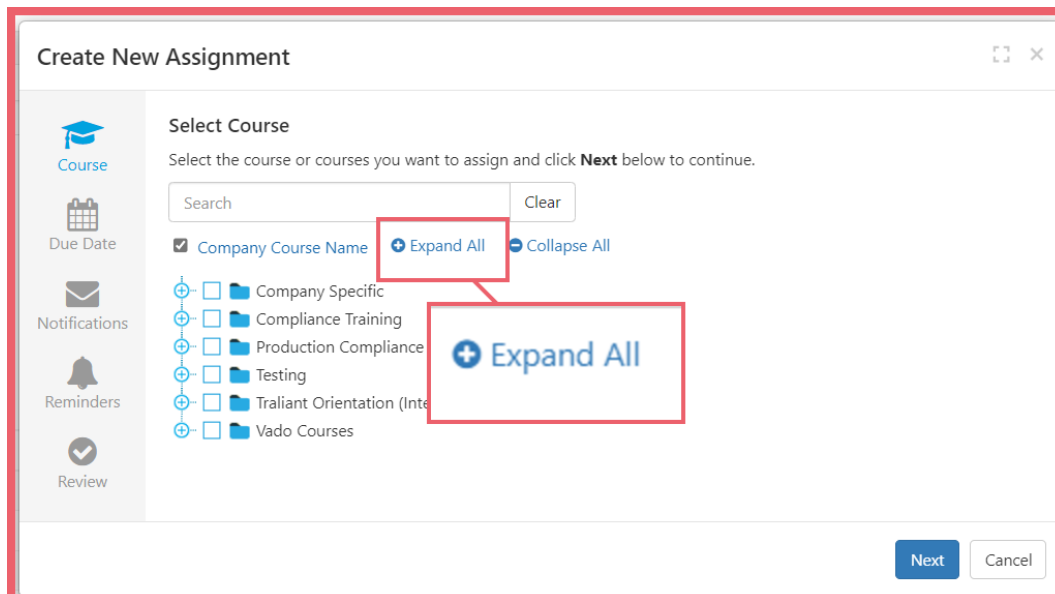
Then, click the "Action" box, and then click "Assign Courses."

Action
-Apply Action-

-Apply Action-
▼

- Assign Courses**
- Unassign Courses
- Share Electives
- Remove Electives
- Assign Department
- Activate Users
- Deactivate Users
- Resend Assignment Notification
- Send Reminder Notification

Expand All will show all courses under a category. Select course(s) to assign, and click Assign Courses in lower right.



Create New Assignment

Select Course

Select the course or courses you want to assign and click **Next** below to continue.

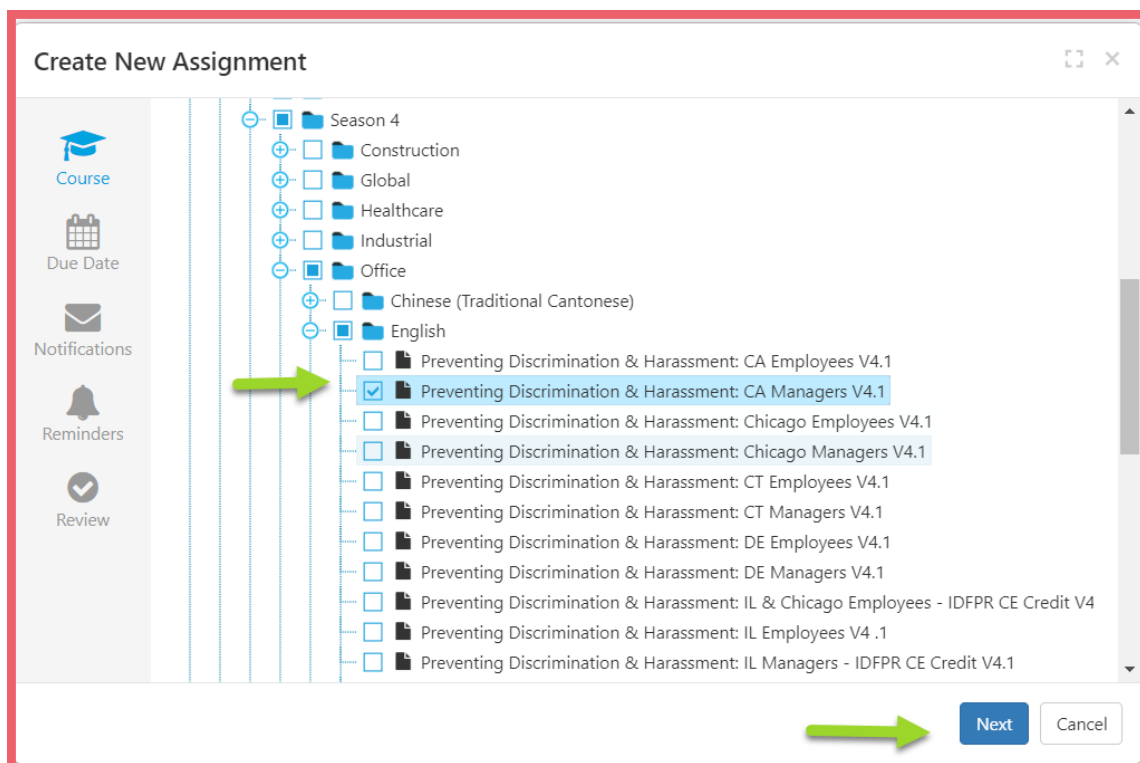
Search Clear

☒ Company Course Name **+ Expand All** **- Collapse All**

- ☐ Company Specific
- ☐ Compliance Training
- ☐ Production Compliance
- ☐ Testing
- ☐ Traliant Orientation (Inte
- ☐ Vado Courses

+ Expand All

Next **Cancel**



Create New Assignment

Course

Due Date

Notifications

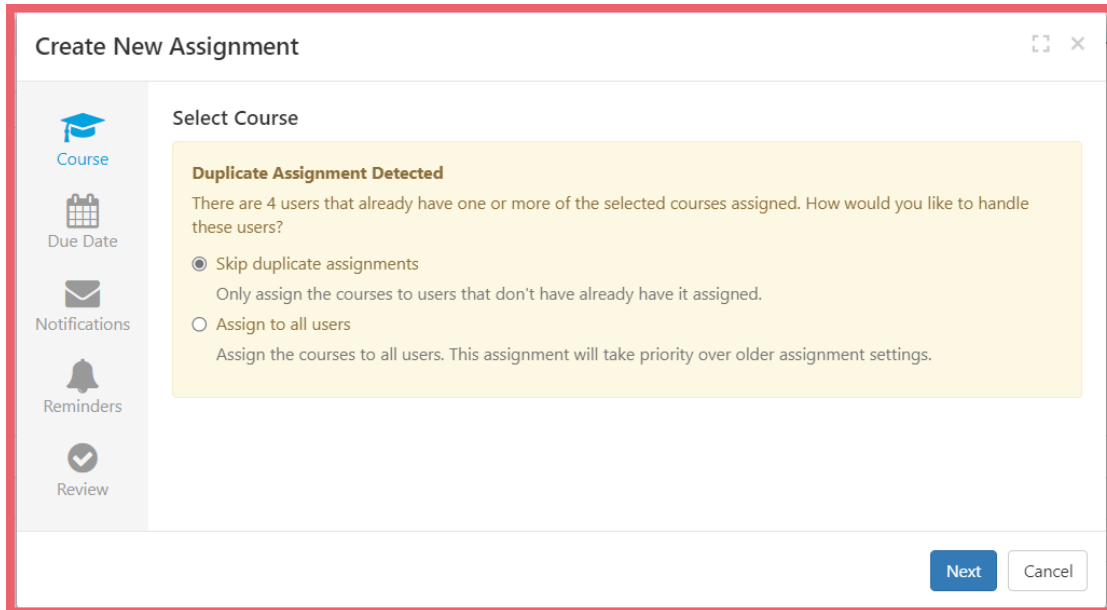
Reminders

Review

- ☒ Season 4
 - ☐ Construction
 - ☐ Global
 - ☐ Healthcare
 - ☐ Industrial
 - ☒ Office
 - ☐ Chinese (Traditional Cantonese)
 - ☒ English
 - ☐ Preventing Discrimination & Harassment: CA Employees V4.1
 - ☒ Preventing Discrimination & Harassment: CA Managers V4.1
 - ☐ Preventing Discrimination & Harassment: Chicago Employees V4.1
 - ☐ Preventing Discrimination & Harassment: Chicago Managers V4.1
 - ☐ Preventing Discrimination & Harassment: CT Employees V4.1
 - ☐ Preventing Discrimination & Harassment: CT Managers V4.1
 - ☐ Preventing Discrimination & Harassment: DE Employees V4.1
 - ☐ Preventing Discrimination & Harassment: DE Managers V4.1
 - ☐ Preventing Discrimination & Harassment: IL & Chicago Employees - IDFPD CE Credit V4
 - ☐ Preventing Discrimination & Harassment: IL Employees V4.1
 - ☐ Preventing Discrimination & Harassment: IL Managers - IDFPD CE Credit V4.1

Next **Cancel**

If any of the names selected are previously enrolled in the selected course, you will see a notice of Duplicate Assignment Detected. You have the option to re-assign (assign to all) or skip duplicates.



The screenshot shows a 'Create New Assignment' dialog box with a sidebar on the left containing icons for Course, Due Date, Notifications, Reminders, and Review. The main area is titled 'Select Course' and displays a yellow warning box with the heading 'Duplicate Assignment Detected'. The text inside the box states: 'There are 4 users that already have one or more of the selected courses assigned. How would you like to handle these users?'. Below this text are two radio button options: 'Skip duplicate assignments' (which is selected) and 'Assign to all users'. The 'Skip duplicate assignments' option has a subtext: 'Only assign the courses to users that don't have already have it assigned.' The 'Assign to all users' option has a subtext: 'Assign the courses to all users. This assignment will take priority over older assignment settings.' At the bottom right of the dialog are 'Next' and 'Cancel' buttons.

Create New Assignment

Select Course

Duplicate Assignment Detected

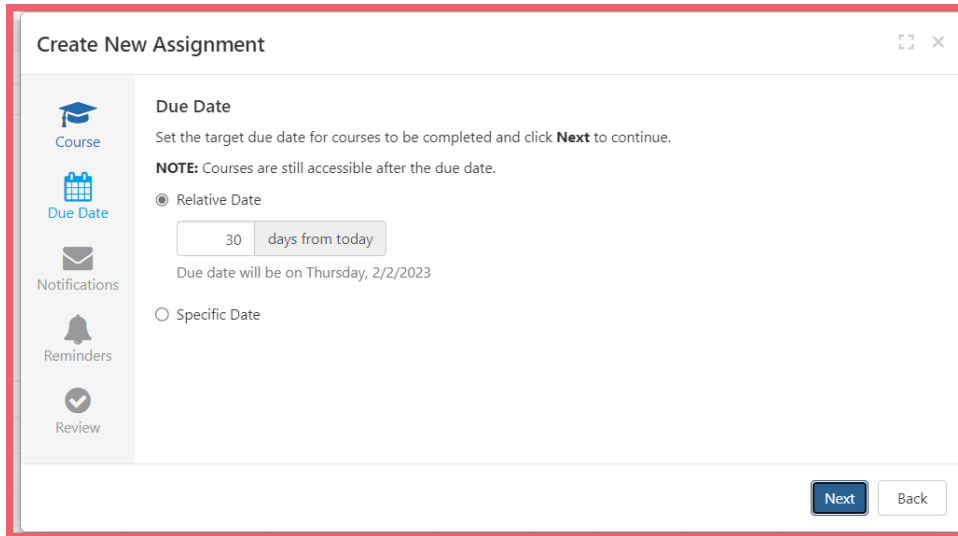
There are 4 users that already have one or more of the selected courses assigned. How would you like to handle these users?

☒ Skip duplicate assignments
Only assign the courses to users that don't have already have it assigned.

☐ Assign to all users
Assign the courses to all users. This assignment will take priority over older assignment settings.

Next **Cancel**

Create New Assignment by adding the respective due date. When a relative date (number of days) is added, the actual date will be displayed below. Alternate (but not preferred) option is to select a specific date for course completion. Once due date has been entered, select Next.

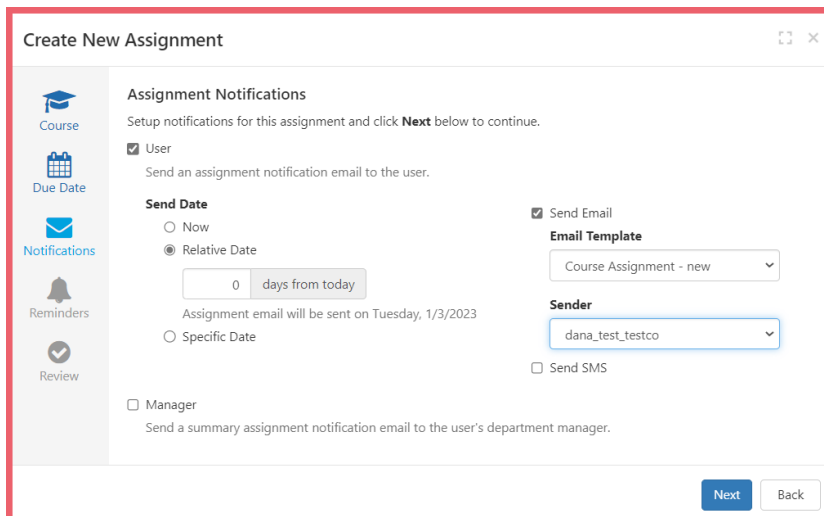


The screenshot shows the 'Create New Assignment' dialog box with the 'Due Date' step selected. The left sidebar contains icons for Course, Due Date, Notifications, Reminders, and Review. The main content area is titled 'Due Date' and includes instructions: 'Set the target due date for courses to be completed and click **Next** to continue.' A note states: 'NOTE: Courses are still accessible after the due date.' There are two radio button options: 'Relative Date' (selected) and 'Specific Date'. Under 'Relative Date', there is a text input field containing '30' and a dropdown menu set to 'days from today'. Below this, it says 'Due date will be on Thursday, 2/2/2023'. At the bottom right are 'Next' and 'Back' buttons.

The next selection is Assignment Notifications.

Confirm User is checked if notification is to be sent out to learner. Select the appropriate email template (i.e., assignment, multi-course assignment, specific custom other), and indicate when the notification should be sent (Now, Relative Date, Specific Date).

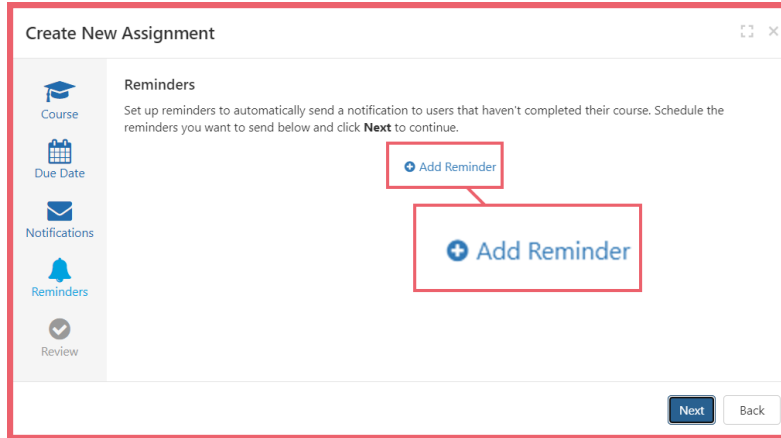
If the manager has requested to receive copies of assignment notifications, confirm the box is checked. In most cases, this should be **unchecked**.



The screenshot shows the 'Create New Assignment' dialog box with the 'Assignment Notifications' step selected. The left sidebar is the same as the previous step. The main content area is titled 'Assignment Notifications' and includes instructions: 'Setup notifications for this assignment and click **Next** below to continue.' There are two checkboxes: 'User' (checked) and 'Manager' (unchecked). Under 'User', it says 'Send an assignment notification email to the user.' Under 'Manager', it says 'Send a summary assignment notification email to the user's department manager.' There are two radio button options for 'Send Date': 'Now' and 'Relative Date' (selected). Under 'Relative Date', there is a text input field containing '0' and a dropdown menu set to 'days from today'. Below this, it says 'Assignment email will be sent on Tuesday, 1/3/2023'. There is also a 'Send Email' checkbox (checked) and a 'Send SMS' checkbox (unchecked). Under 'Send Email', there is an 'Email Template' dropdown menu set to 'Course Assignment - new' and a 'Sender' dropdown menu set to 'dana_test_testco'. At the bottom right are 'Next' and 'Back' buttons.

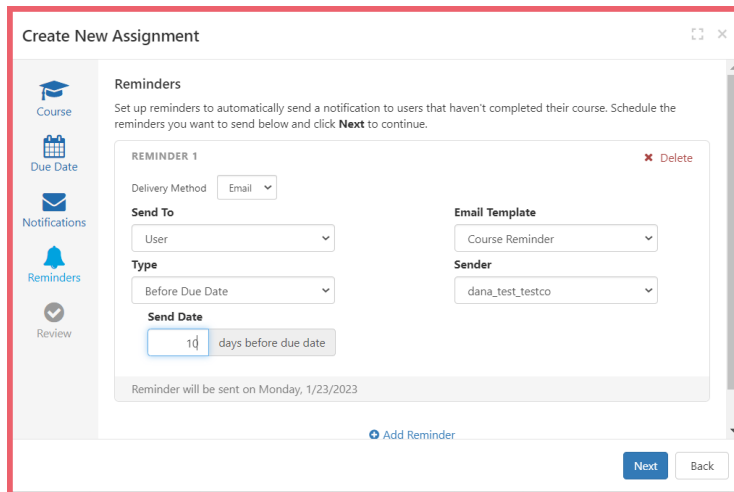
Select Next to move to Reminder notifications.

Add reminder notifications – select Add Reminder



Then select the appropriate variables to complete the notification.

- Send To will be user, manager, or user and manager
- Type indicates after notification, before due date, after due date, etc.
- Email template is the template to be sent
- Sender is the name of the person who will be the signature on the notification, if, it is not hard-coded in the template itself.



Continue to click Add Reminder for any additional reminders you would like scheduled.

Recurring reminders can also be configured.

The TYPE is Recurring after due date, and then select the days as Every X days after due date, with ending after a specified number of occurrences

Due Date

Notifications

Reminders

Review

Create Default Assignment

Reminders

Set up reminders to automatically send a notification to users that haven't completed their course. Schedule the reminders you want to send below and click **Next** to continue.

REMINDER 1

Delivery Method

Email

Send To

User

Email Template

- Select -

Type

Recurring After Due Date

Sender

- Select -

Send Frequency

Every 2 days after due date

Recurring Reminder Options

☒ End After 7 reminders

Add Reminder

Next

Back

Course

Due Date

Notifications

Reminders

Review

Reminders

Set up reminders to automatically send a notification to users that haven't completed their course. Schedule the reminders you want to send below and click **Next** to continue.

REMINDER 1

Delivery Method

Email

Send To

User

Email Template

Reminder-New

Type

Before Due Date

Sender

dana_test_testco

Send Date

7 days before due date

Reminder will be sent on Friday, 7/8/2022

REMINDER 3

Delivery Method

Email

Send To

User

Email Template

Reminder-New

Type

Recurring After Due Date

Sender

dana_test_testco

Send Frequency

Every 2 days after due date

Recurring Reminder Options

☐ End By

☒ End After 7 reminders

Reminders will be sent on: 7/17/2022, 7/19/2022, 7/21/2022, 7/23/2022, 7/25/2022, 7/27/2022, 7/29/2022

Add Reminder

Next

Back

ID

Username

First

Last

Location

State

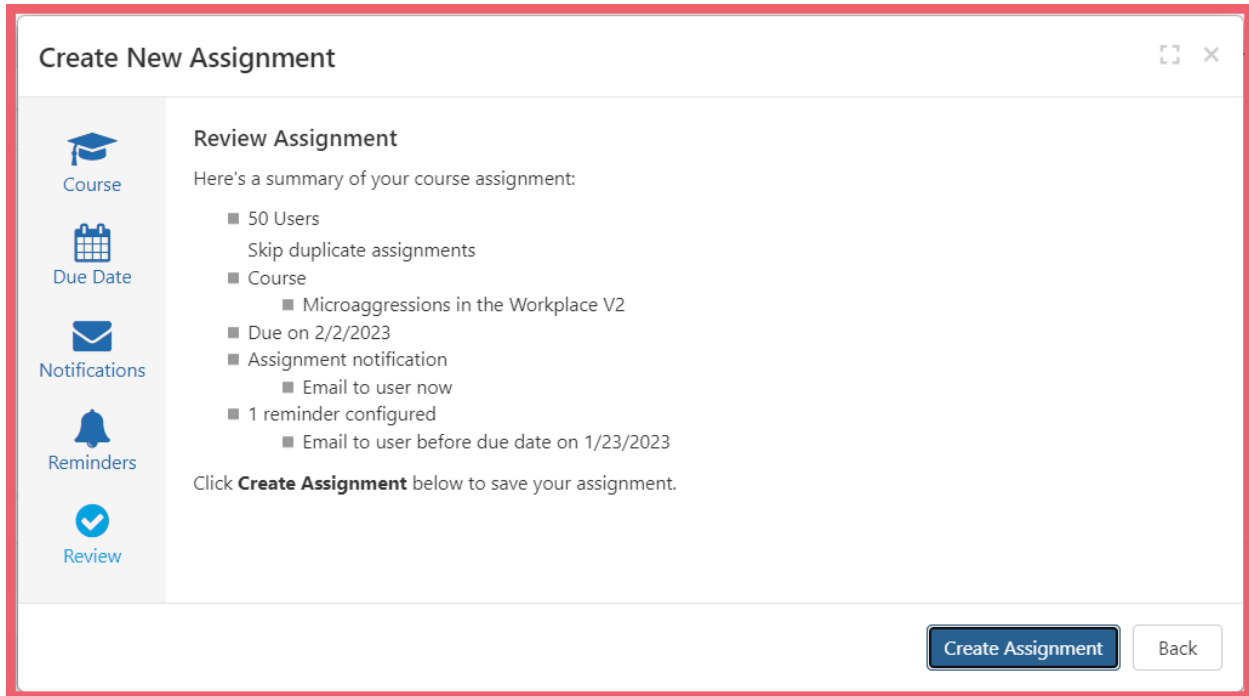
Country

Title

Right

Show me how...

Click Next when all notifications have been added to the schedule.



Create New Assignment

Review Assignment

Here's a summary of your course assignment:

- 50 Users
- Skip duplicate assignments
- Course
 - Microaggressions in the Workplace V2
- Due on 2/2/2023
- Assignment notification
 - Email to user now
- 1 reminder configured
 - Email to user before due date on 1/23/2023

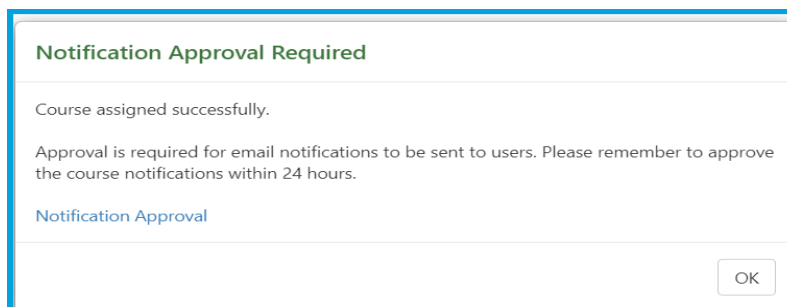
Click **Create Assignment** below to save your assignment.

Create Assignment **Back**

A Summary of the assignment will be visible for review; Back to edit, otherwise click Create Assignment.

When assignment is created you will see Success, course assigned successfully, OR, **Notification Approval Required**. This is a link to the approval page.

- 10 users or less: email notifications will automatically be sent upon clicking "Create Assignment"
- 11 or more users: email notifications must be approved before being sent (see Section 1.6 "Notification Approvals")



Notification Approval Required

Course assigned successfully.

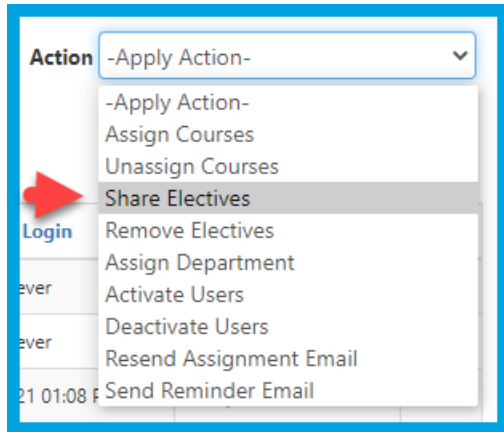
Approval is required for email notifications to be sent to users. Please remember to approve the course notifications within 24 hours.

[Notification Approval](#)

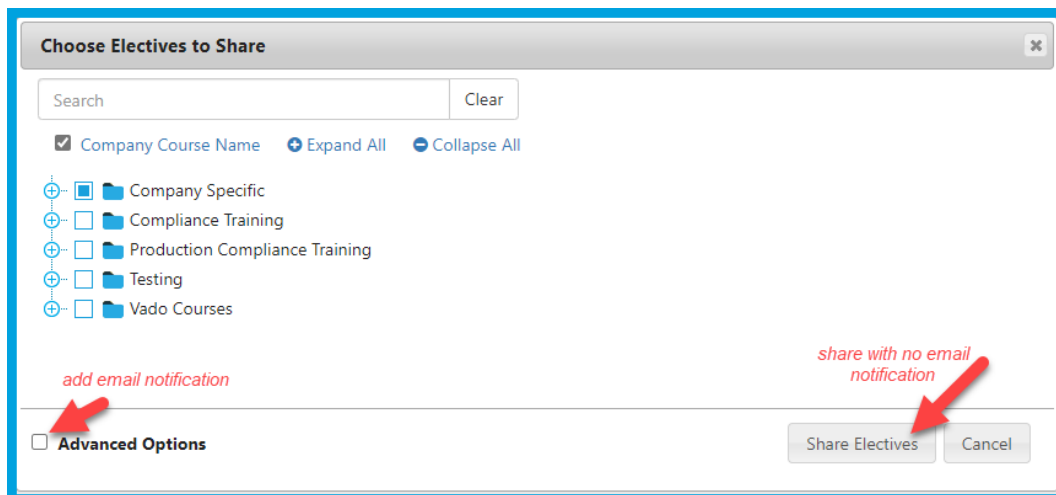
OK

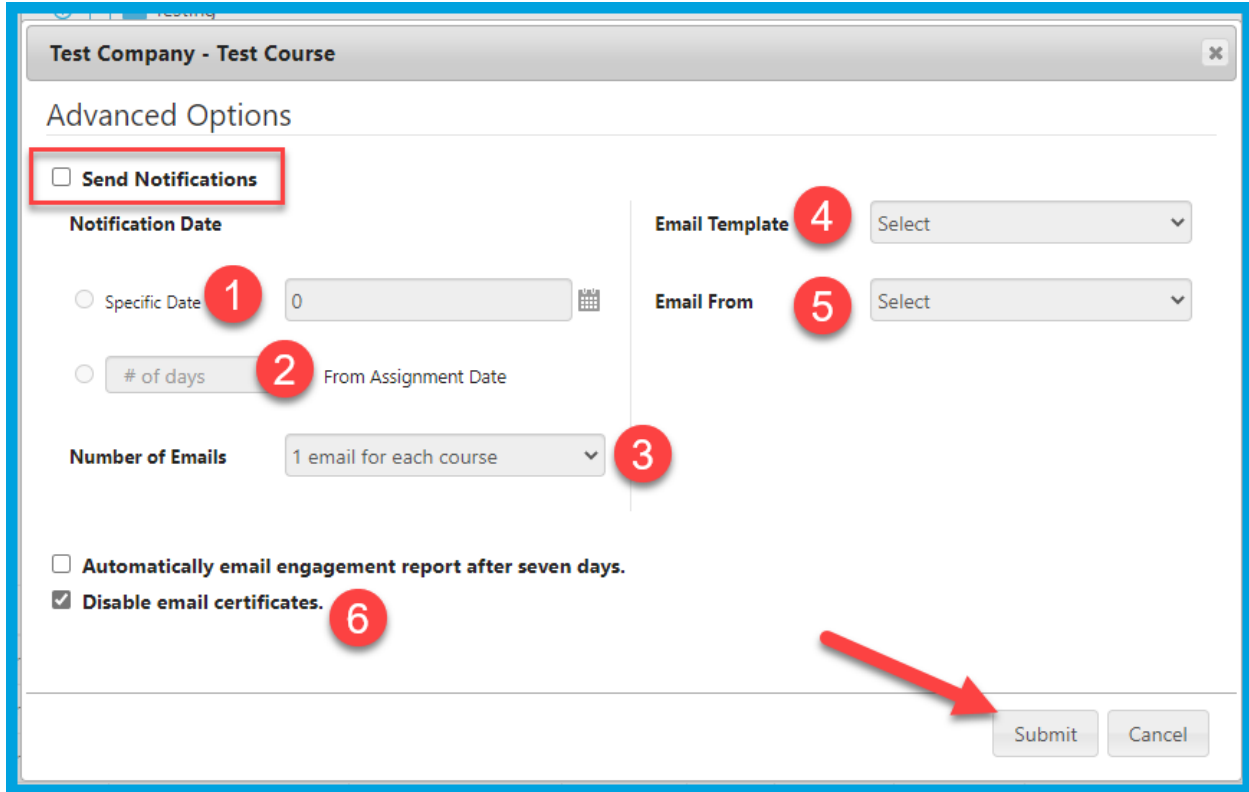
Sharing Electives

Electives are course lessons that users are not required to complete. Sharing an Elective is similar to assigning a course. After you select the users to share the elective with from the "Manage Users" section, click "Share Elective":



Select your Electives to share. To share without an email notification, click "Share Electives". To add an email notification, check the "Advanced Options" box:





1. Select Send Notifications if you wish for an email to be generated.

Notification Date:

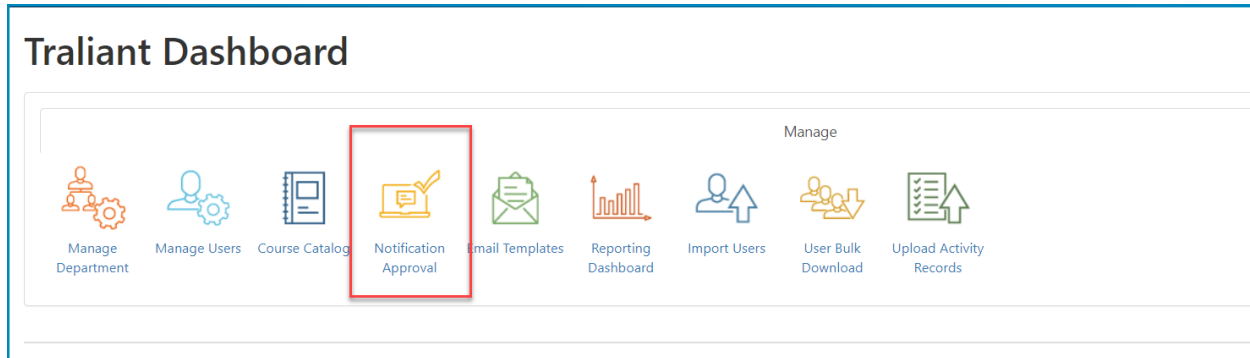
2. Select the date you would like the email notification to be sent.
3. Or select the number of days after sharing the Elective to send the notification.

Email Detail

4. Select Number of Emails to be sent, whether to send an email notification for each Elective shared, or 1 email notification for all Electives shared.
5. Select the email template (see Section 2 on email templates)
6. Select who in your organization the notification will be sent from
7. Select whether you would like to receive an engagement report email after 7 days, and whether you would like to Enable the "Certificate of Completion" email to be sent to users upon completion of the Elective.

Notification Approval

If a course is assigned to greater than 10 people (11 people or more), email notifications will not be sent until they are approved. A popup window will appear to advise you that approval is required. Click on that popup, or go to the Dashboard and select "Notification Approval":



Select checkboxes for users, and then select whether to Approve, Suspend, or Delete the email notifications to these users:

(UPDATE IMAGE BELOW)

Dashboard / Site administration / Traliant Dashboard / Company Notification Approval

440 Notifications

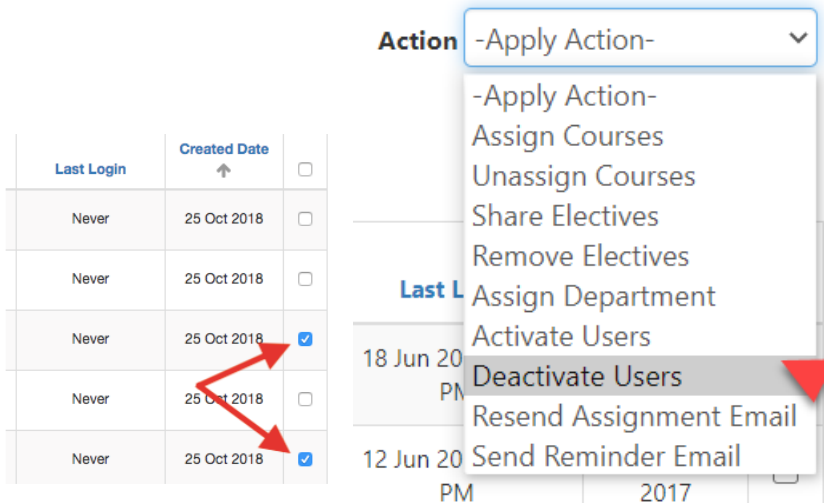
ID	Rollout	Course	User Count	Type	Notification Date	Status	Action
32	Trial_Preventing Discrimination & Harassment: Employees: V1.1_20161229122827	Preventing Discrimination & Harassment: Employees: V1.1	1	After Assignment	11/18/2016	Active	<input type="checkbox"/>
36	Trial_Preventing Discrimination & Harassment: Employees: V1.1_20161229153504	Preventing Discrimination & Harassment: Employees: V1.1	1	After Assignment	11/18/2016	Active	<input type="checkbox"/>
47	Trial_Preventing Discrimination & Harassment: Employees: V1.1_20161230124646	Preventing Discrimination & Harassment: Employees: V1.1	1	After Assignment	11/18/2016	Active	<input checked="" type="checkbox"/>

A red arrow points from the 'Action' column header to a dropdown menu. The dropdown menu is open, showing options: '-Apply Action-', 'Approve', 'Suspend', and 'Delete'.

NOTE: It is important to approve these notifications at the time of assignment. If not, they will expire, and assignments will need to be recreated.

Deactivate a User

In the Manage Users section, search for User(s) to deactivate and select checkbox next to User(s). Click on "Action" and then select "Deactivate Users":



Alternatively, you can edit the individual user profile, and change status to deactivated, and select Update Profile.

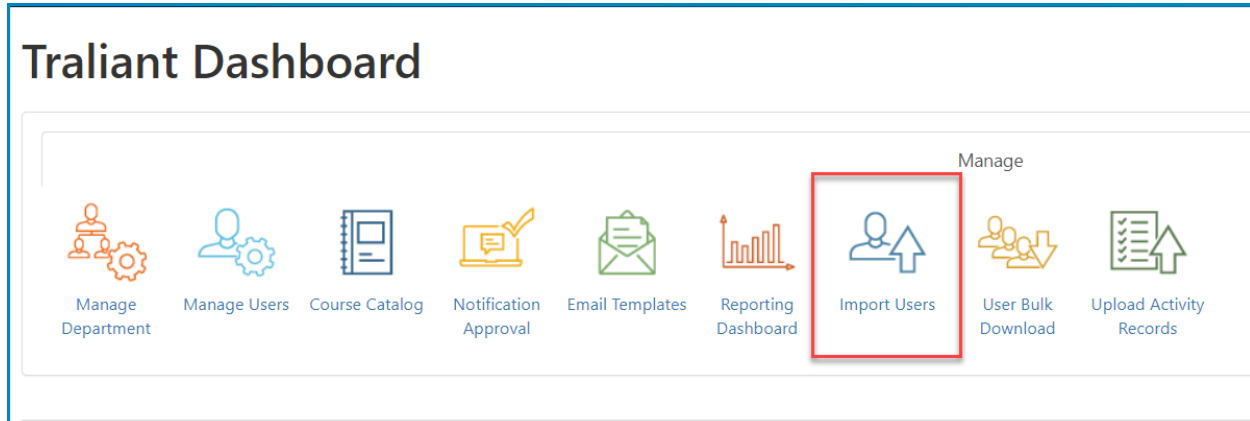
Import Users (previously Uploading Users)

Using our LMS User Upload Template, add your list of Users and save as a CSV file. You do not need to fill in all template fields, but these fields are required:

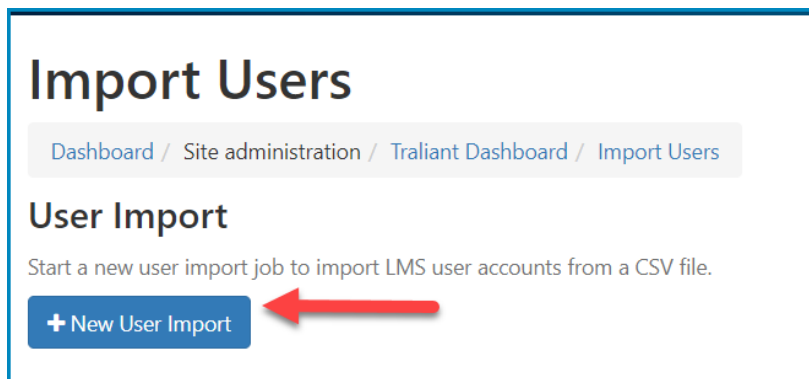
- First Name
- Last Name
- Username
- Email Address
- Department
- Password – required for NEW users

*Template column headings are case-sensitive – do not edit

On the Dashboard, select “Import Users”




Then, to begin the import process, select New User Import, which will walk you thru the steps that follow below.




First step is to select the file (.csv) to be uploaded. Remember, this file should be based on the upload template (or, a previously downloaded userlist), retaining all columns and their respective formats/headers. Click on Browse to navigate to the location of your file, select file, and click next.


Import Users




Select File



Field Mapping



Options



Review

Select File

Select the CSV file with the users you want to import.

Browse...


No file selected


Next


Cancel


The Import Users 'mapping' screen will appear, for confirmation that the data aligns with the fields in the LMS. If you are using our import file, no changes should be necessary. If this is your first user import, you will want to confirm that your column headings (LMS Field) match the correct data. When all field data has been confirmed, scroll down to click NEXT at bottom right of window.

Import Users

Select File

Field Mapping

Options

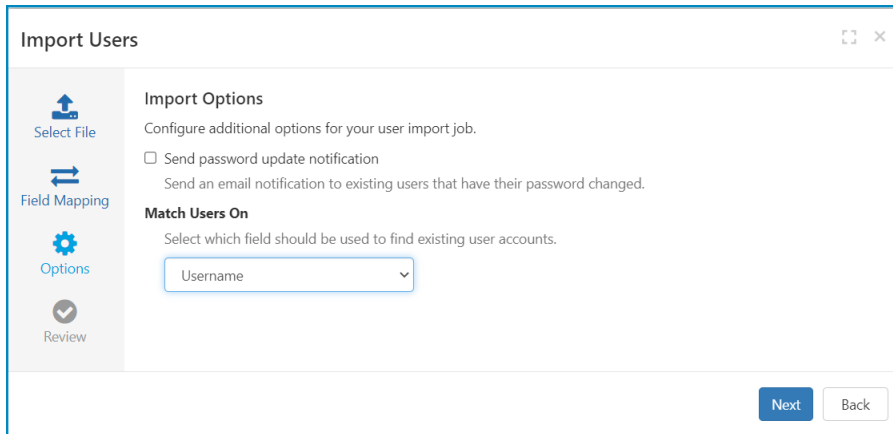
Review

Map CSV Fields

Confirm how the fields in your CSV file should map to the corresponding LMS user field.

LMS Field	CSV Field	Sample Data
First Name	<input type="text" value="firstname"/>	
Last Name	<input type="text" value="lastname"/>	
Username	<input type="text" value="username"/>	text_test
Email	<input type="text" value="email"/>	
Title	<input type="text" value="Title"/>	
Employee ID	<input type="text" value="idnumber"/>	1705269
LMS Rights	<input type="text" value=""/>	Student

Import Options provide for the upload to 'match' against Username or Employee ID. For most uploads the records match will remain at the default, username. If there are many updates to username (i.e., corporate email/domain change) then users can be updated by matching Employee ID. Note that in this case the employee ID may be your company ID, or, Traliant system generated ID when user was initially loaded.




The screenshot shows a web application window titled "Import Users". On the left is a sidebar with four icons: "Select File" (upload icon), "Field Mapping" (double arrows), "Options" (gear icon), and "Review" (checkmark icon). The "Options" tab is selected. The main area is titled "Import Options" and contains the text "Configure additional options for your user import job." Below this is a checkbox labeled "Send password update notification" with the subtext "Send an email notification to existing users that have their password changed." Underneath is a section titled "Match Users On" with the text "Select which field should be used to find existing user accounts." A dropdown menu is set to "Username". At the bottom right are "Next" and "Back" buttons.


NOTE:

- Generally you will not want to send a password update notification when updating user records.
- If your company has auto-assignment rules configured, you will see the option to execute rules on upload and will determine if you wish to toggle that on (dependent upon the upload).


The final step is to Review User Import settings and select Start Import




Select File




Field Mapping




Options




Options




Options




Options



Options



Options



Review

Review User Import

Here's a summary of your user import:

Field Mapping

LMS Field	CSV Field
First Name	firstname
Last Name	lastname
Username	username
Email	email
Title	Title
Employee ID	idnumber
LMS Rights	role
Department	department
Password	password
State	State
Country	Country
Location	Location
Phone	phone2
Hire Date	Hire Date
Status	status
Gender	Gender
Email User Certificates	Email User Certificates

Import Options

Match Users On: **Username**


Send Password Update Email: **No**

Click **Start Import** below to submit your user import job.

Start Import

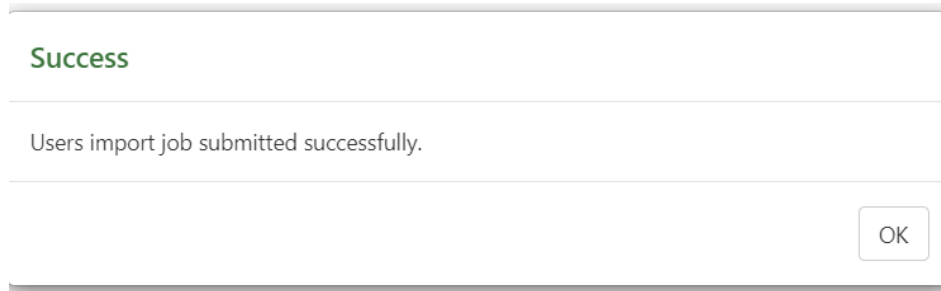
Back

© Traliant Holding

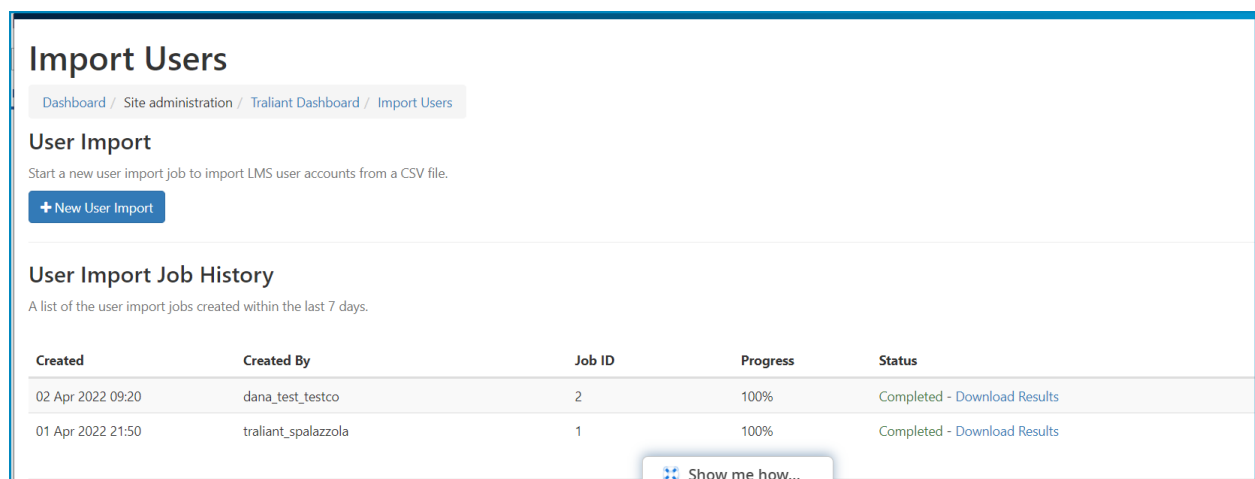

Show me how...

traliant.com

You will see the following confirming job submitted



And finally, will see the confirmation of the completion of the process on-screen

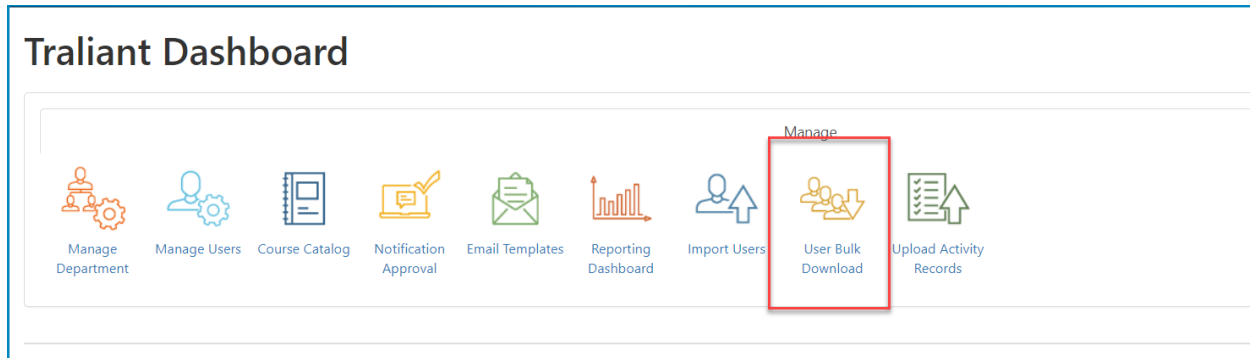


It is recommended to download the report to review any records that may have failed, to confirm that you have had a successful upload!

Downloading Users

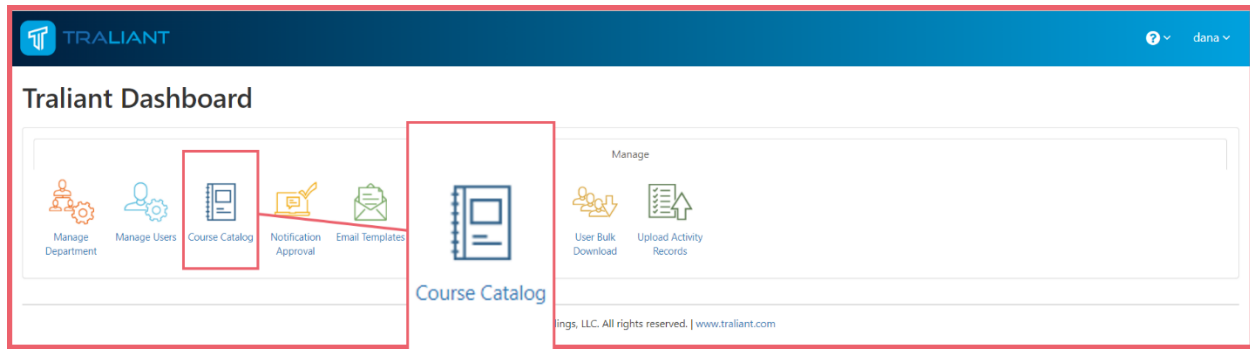
If you need to review your user list, there are two (2) options available.

One option is to export a FULL list of all users in the LMS, active and inactive (all history). This can be run from the Dashboard, select "User Bulk Download", and you will be offered the option to download a .csv file that will provide a full export. Note that a status of "T" is inactive in the Traliant LMS.



To review active users, or a subset, you can now download that alone from the Manage Users section of the dashboard. Please [click here](#) to review that process.

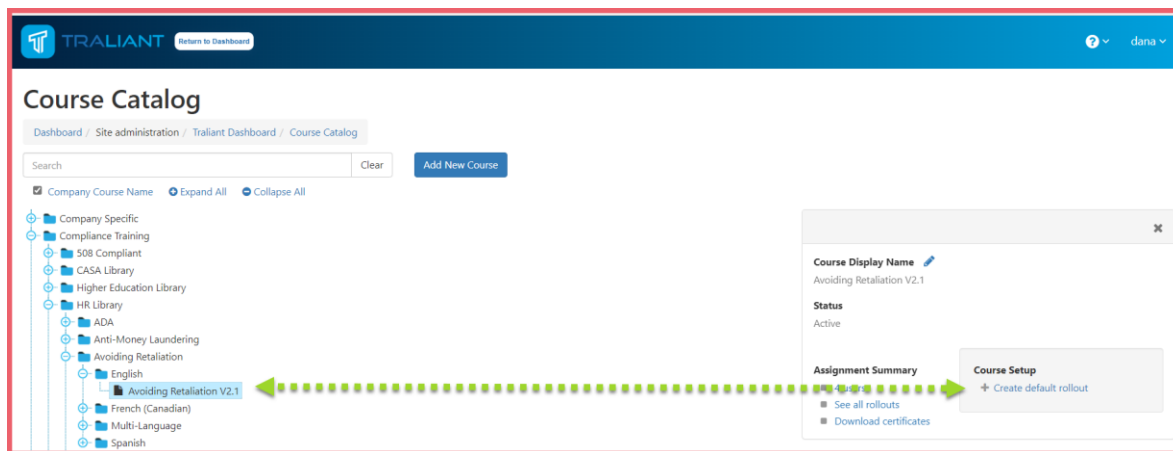
Course Catalog



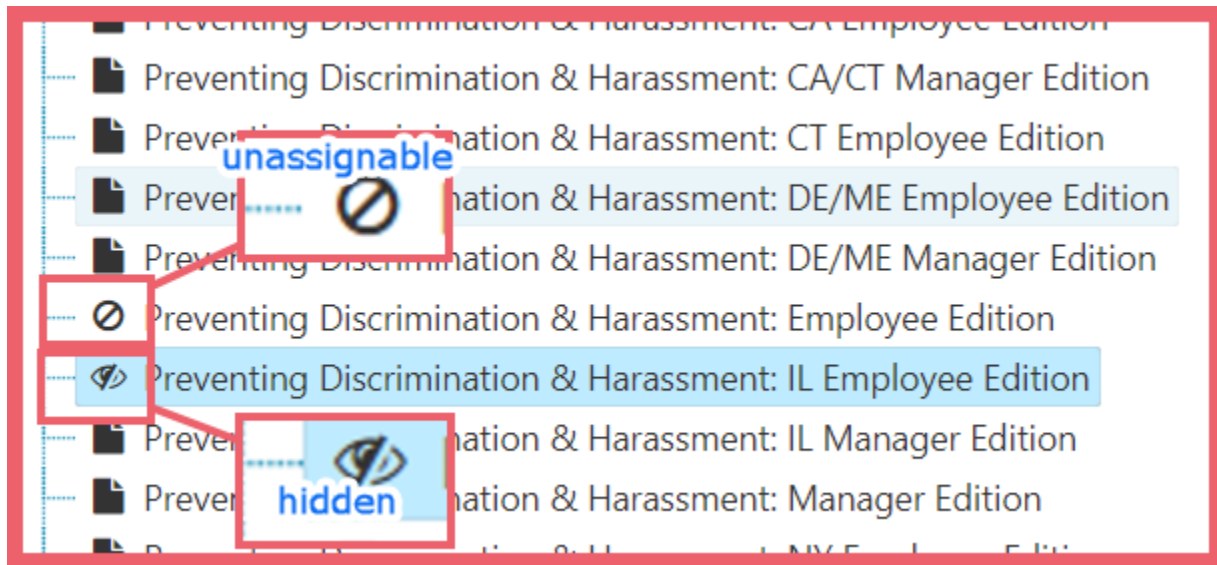
Default Rollout Configuration

Courses are added to your course catalog as they are licensed and built for your organization. Courses are typically configured with a default rollout configuration, that sets the 'standard' for course assignment notifications. Any defaults set can be overridden at the time of assignment of courses, if the due date or reminder dates need to be adjusted.

The defaults are set similarly to the assignment of courses shown in this guide.



Active, Unassignable, Hidden Courses



A course is generally categorized as '**unassignable**' when a newer version of a course has been added to your course catalog. The course will remain available to those who have it assigned, but will not be assigned to anyone as a new courses.

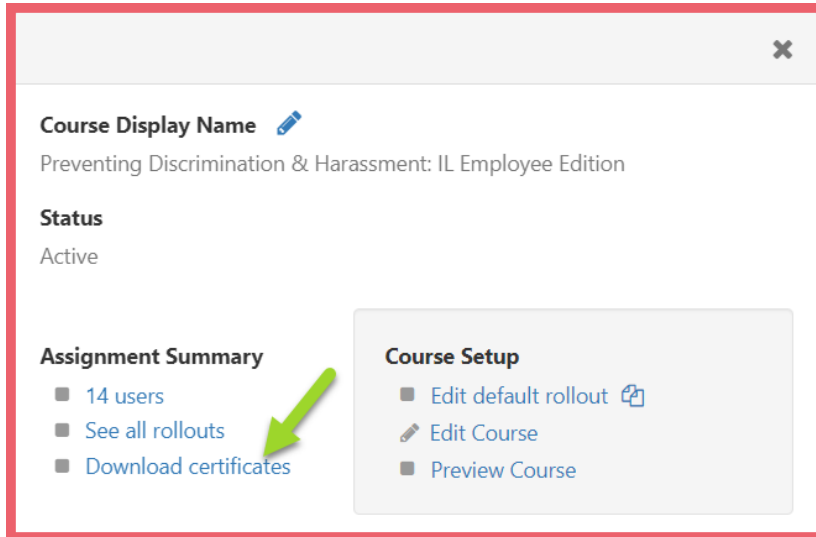
A course is generally categorized as '**hidden**' when a newer version of a course has been added to your course catalog, and the old version of the course is no longer needed to be accessible. The course will be hidden from those who have it assigned, which is helpful to avoid confusion for those with multiple assignments. All history of the course is retained in the user records. When a course is made hidden it is important to ensure that there are no open assignments in need of completion, and if there are, to determine if the course should remain 'unassignable' or 'hidden' and if the latter, replace open assignments with the newer version of the course

All other courses remain **active**

Downloading Course Completion Certificates

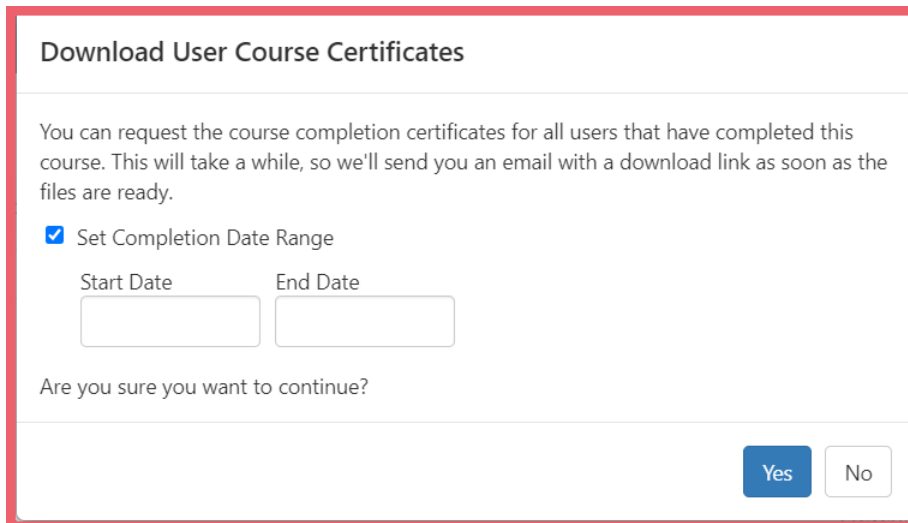
Completion certificates can be downloaded in bulk, by course, from the course catalog.

In the course catalog, first select the course you would like to report on. Then, on the right, select Download Certificates



A modal window titled 'Course Display Name' with a close button (X) in the top right corner. The course name is 'Preventing Discrimination & Harassment: IL Employee Edition'. Below it, the status is 'Active'. There are two main sections: 'Assignment Summary' and 'Course Setup'. The 'Assignment Summary' section lists '14 users', 'See all rollouts', and 'Download certificates' (highlighted with a green arrow). The 'Course Setup' section lists 'Edit default rollout', 'Edit Course', and 'Preview Course'.

Toggling 'on' the Set completion date range provides the date boxes, to filter as needed



A modal window titled 'Download User Course Certificates'. It contains a paragraph explaining that certificates can be requested for all users who completed the course, and that an email with a download link will be sent once the files are ready. Below this, there is a checkbox labeled 'Set Completion Date Range' which is checked. Underneath the checkbox are two input fields for 'Start Date' and 'End Date'. At the bottom, there is a confirmation question 'Are you sure you want to continue?' and two buttons: 'Yes' and 'No'.

Follow prompts, and you will receive an email with a link to download requested certificates of completion.

Resending Assignment and Reminder Notifications

At times it is necessary to resend an assignment notification or reminder to an individual. This can easily be done as follows.

Find the user in Manage Users.

Click into the user record.

Under Assigned Courses, check the box to the far right for the course the notification is needed.

Then, select Resend Assignment Email or Send Reminder Email.

You will have the ability to select the template (assignment, reminder, past due, etc), and select 'who' the email is from. Where the template has hard-coded signature this is not relevant.

Note that if any updates are needed (i.e., incorrect email update) that should be done prior to sending the notification.

Assigned Courses

Course Name	Date Assigned	Time Spent	Last Accessed	Due	Completed	Action
Anti-Bribery & Anti-Corruption V2	12 Nov 2020	1 hrs 1 min 53 sec	16 Nov 2020 11:05 AM	12 Nov 2020	Yes	-Apply Action-
Antisoborno Y Anticorrupción V1.1	05 Mar 2021	7 min 2 sec	05 Mar 2021 11:24 AM	05 Mar 2021	No	-Apply Action-
Avoiding Personal Choice Bias V3	02 Apr 2021		02 Apr 2021 1:30 PM	02 Apr 2021	No	Assign Courses
COVID-19: Returning to the Workplace	14 Apr 2021	2 min 29 sec	14 Apr 2021 12:33 PM	14 May 2021	No	Unassign Courses
California Consumer Privacy Act (CCPA)	25 Feb 2021	51 sec	25 Feb 2021 12:52 PM	25 Feb 2021	No	Resend Assignment Email
Creating a Positive Work Environment	11 Nov 2020	11 min 56 sec	11 Nov 2020 9:46 AM	11 Nov 2020	Yes	Send Reminder Email
CreatingPositiveWorkEnv10_Spanish_040521	05 Apr 2021	3 min 3 sec	05 Apr 2021 11:26 PM	05 Apr 2021	Yes	Complete Course
Cultural Competency & Humility	16 Mar 2021	1 min 53 sec	16 Mar 2021 1:39 PM	16 Mar 2021	No	
Código de conducta del FAR	03 Mar 2021	38 min 10 sec	03 Mar 2021 9:52 AM	03 Mar 2021	Yes	
Data Privacy: General Data Protection Regulation (GDPR) & Information Security	06 Apr 2021	7 min 1 sec	06 Apr 2021 9:12 AM	06 May 2021	Yes	

Configure Assignment Notification

Fill out the form below and we'll send an email to users that have not completed the course.

Email From

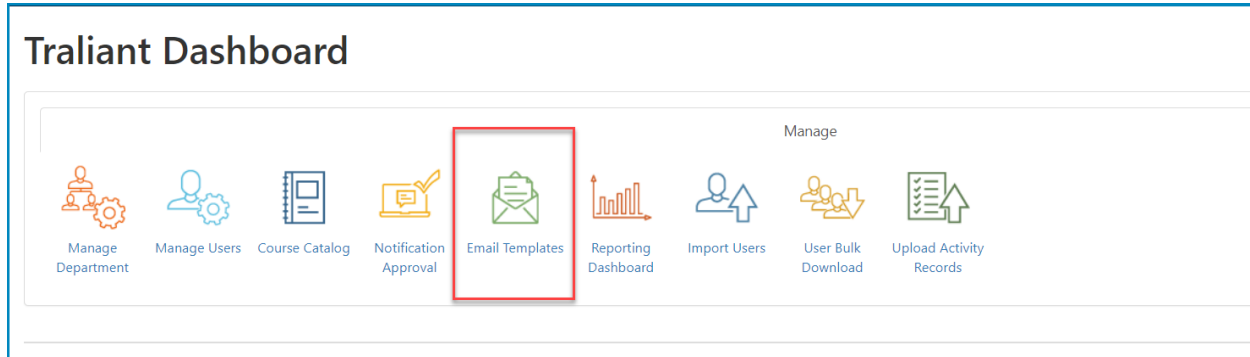
Email Template

Email Templates

Building a New Email Template

Email templates are used to send automated email notifications that are created when assigning courses, sharing electives, and setting reminders.

To build a new template, first go to "Email Templates" in the Dashboard:



Select "New Template":

▼ Email template " for '1_Traliant Trial'

Template Name*

Subject*

Body

Select email variable

Background Color

Customize the surrounding color of the email. Message text will always appear on a white background.

1. **Select a name for the template** This name will appear on dropdowns for email notifications, it will not be seen by users
2. **Choose a subject line**
3. **Add the email content**

4. **Add variable fields**

To customize the email for each recipient, add a variable field from the dropdown list. The variable will appear in the email in braces.

5. When finished, click "Create New Template." The template will now show up in dropdown menus for email notifications.

Sample Course Assignment Email

Here is a sample email template that can be used for notifying users of a course assignment. Fields in **{braces}** will be customized with the user's information:

Template Name: Course Assignment

Subject: Traliant Training Course Assignment

Hello {User_FirstName},

Thank you for your participation in {Company_Name}'s training program. You now have access to the training course: {Course_Name}. This training should be completed by: {Rollout_DueDate}. Please use the link and login credentials below to access the course.

Course Access:

Please note:

If you have previously logged in and changed or forgotten your password, please click here to reset it.

A headset or speakers are required in order to hear the audio portion of the training.

You may start, stop, and resume at any point during the training.

After your session (course completion or stopping to resume later), please exit the course and log out of the system. Log out by selecting the drop-down menu beneath your name in the upper right-hand corner of your screen and select "log out".

The following browsers are supported: Microsoft Edge, Google Chrome, and Firefox and on a Mac, Safari.

Thank you again.

{Sender_FirstName} {Sender_LastName}

{Company_Name}

{Sender_Email}

Sample Course Reminder Email

Here is a sample email template that can be used for course assignment reminder emails. Fields in {brackets} will be customized with the user's information:

Template name: Course Reminder

Subject: Traliant Training Course Reminder

Hello {User_FirstName},

This is to remind you that you have been assigned the following training course: {Course_Name}. This training should be completed by: {Rollout_DueDate}. Please use the link and login credentials below to access the course.

Course Access:

If you do not remember your password, please click here to reset it.

Thank You!

{Sender_FirstName} {Sender_LastName}

{Company_Name}

Sample Past Due Email

Here is a sample email template that can be used for notifying users that a course assignment is past due. Fields in {braces} will be customized with the user's information:

Template name: Past-Due Course Reminder

Subject: Traliant Training Course Past-Due Reminder

Hello {User_FirstName},

This is to remind you that you have now passed the completion due date of {Rollout_DueDate}.

Please login and complete the course immediately. Please use the link and login credentials below to access the course.

Course Access:

If you do not remember your password, please click here to reset it

Thank You!

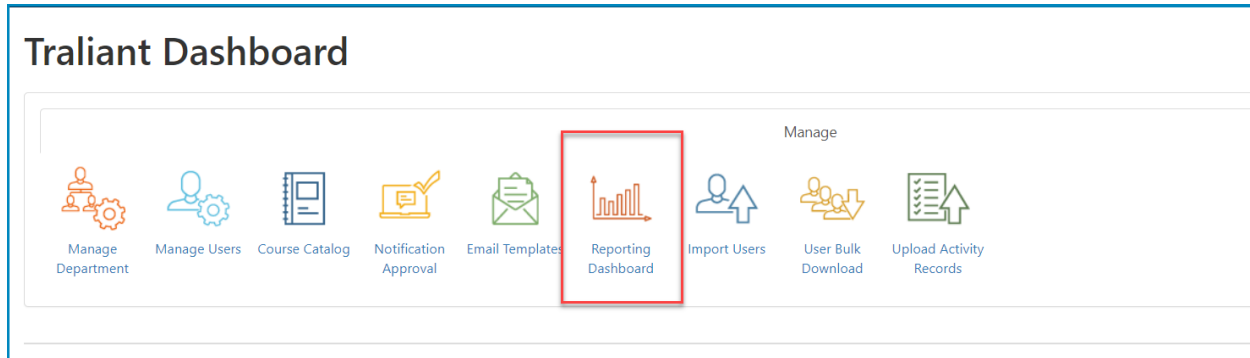
{Sender_FirstName} {Sender_LastName}

{Company_Name}

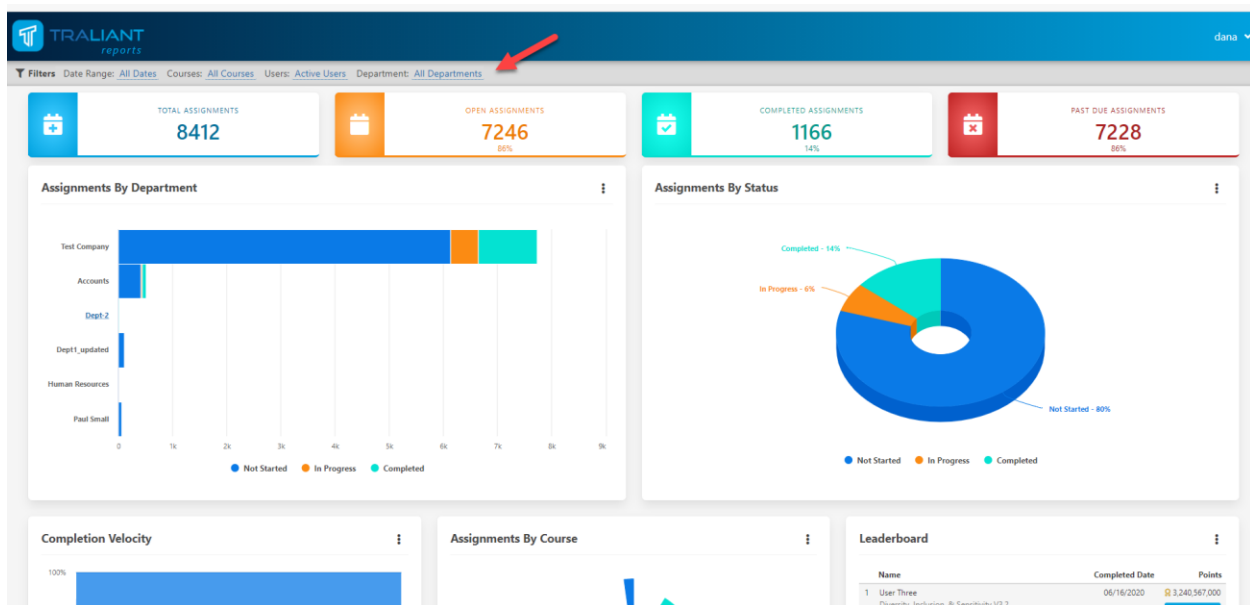
Reporting

Reporting Dashboard

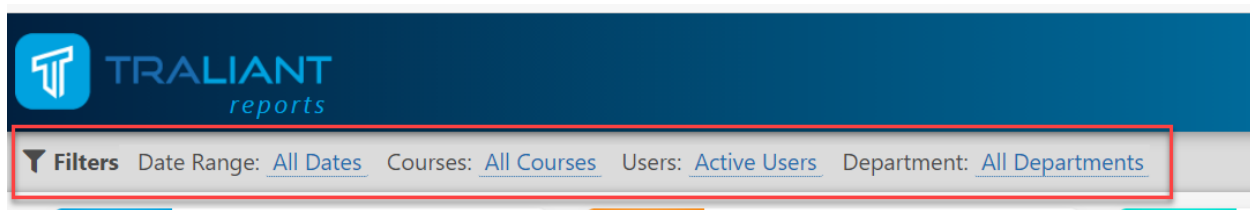
To view the Reporting Dashboard, go to "Reporting Dashboard" in the Dashboard:



Dashboard Overview

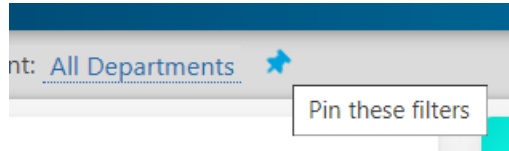


Note the filters for date, course department, and users in the upper left corner (shown below).

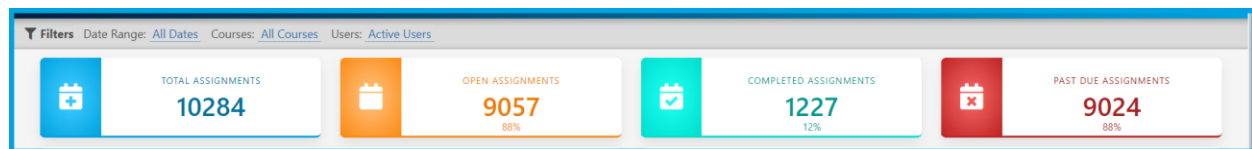


Pin your Filters

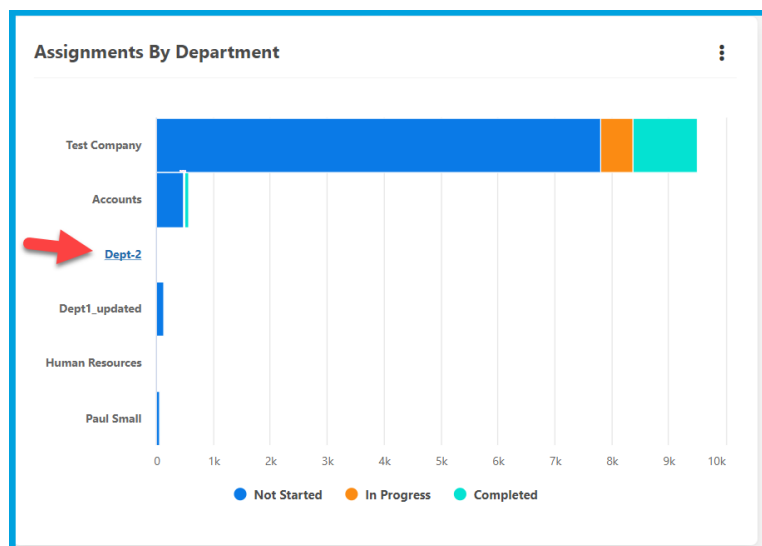
By making selections for filters, such as course(s) or date range, and 'pinning' them, they will stay selected until you reset them to select a new set of filters, making your reporting faster and easier



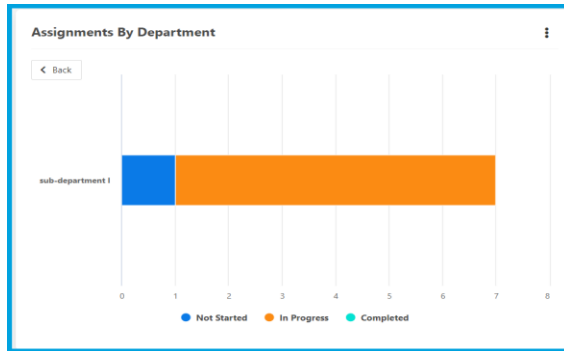
Viewing/Exporting Details



Assignments by Department



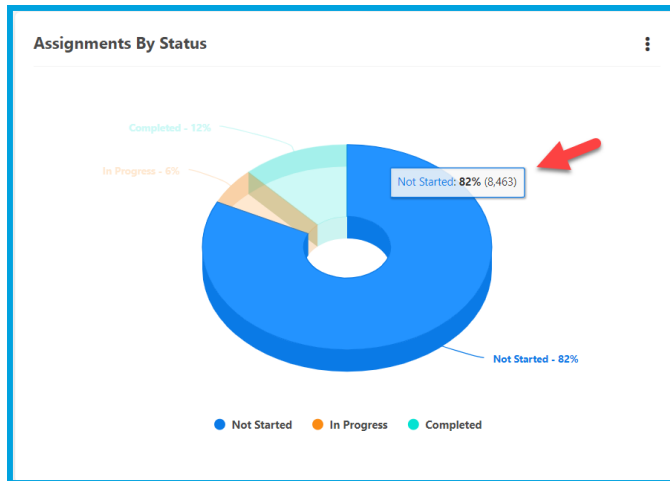
If there is a hierarchy the department will indicate that it can be clicked to drill down into the department data. In this example, clicking on Dept-2 will open the sub-department view shown below. Click on any part of the bar to view the details



In this example, clicking on Completed under sub-department 1 will show:

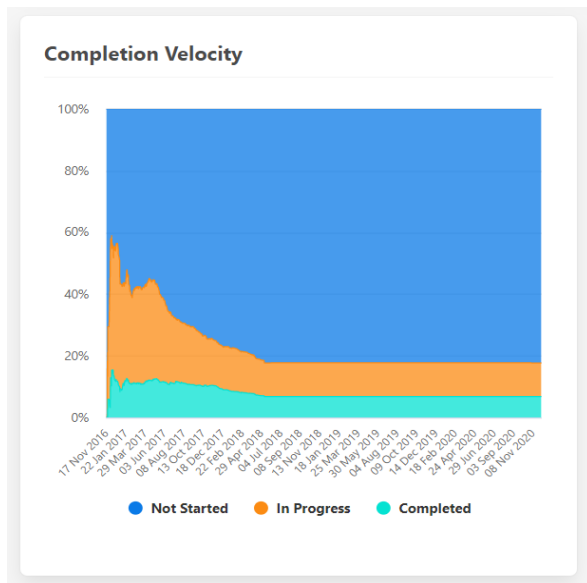
Assignments By Department Details									
Filtered On Courses: All Courses Users: Active Users Department: sub-department 1 Status: Not Started									
Download Excel									
First Name	Last Name	Department	Course	Score	Assigned Date	Due Date	Completed Date	Time Spent	Last Acc
ted	test	sub-department 1	Preventing Discrimination & Harassment in Construction: CA Employees V3.2		02 Feb 2021	02 Feb 2021		0	

Assignments by Status



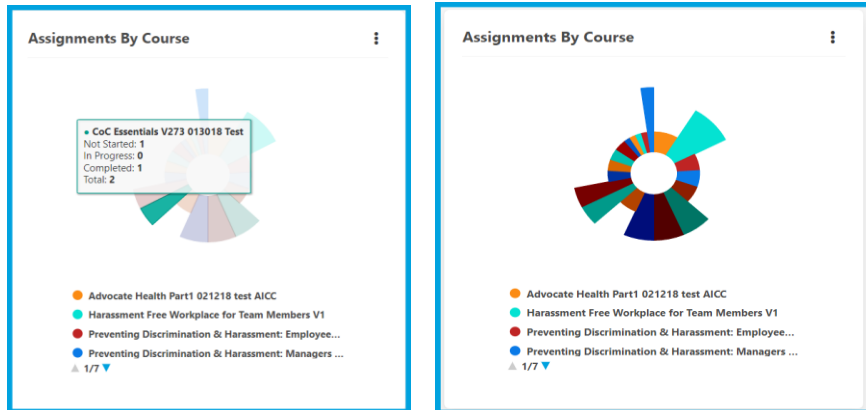
Hovering over the section will show the detail. Clicking into the section will bring up the user detail grid.

Completion Velocity



Top Course Assignments

Hovering over the section will show the detail. Clicking into the section will bring up the user detail grid.



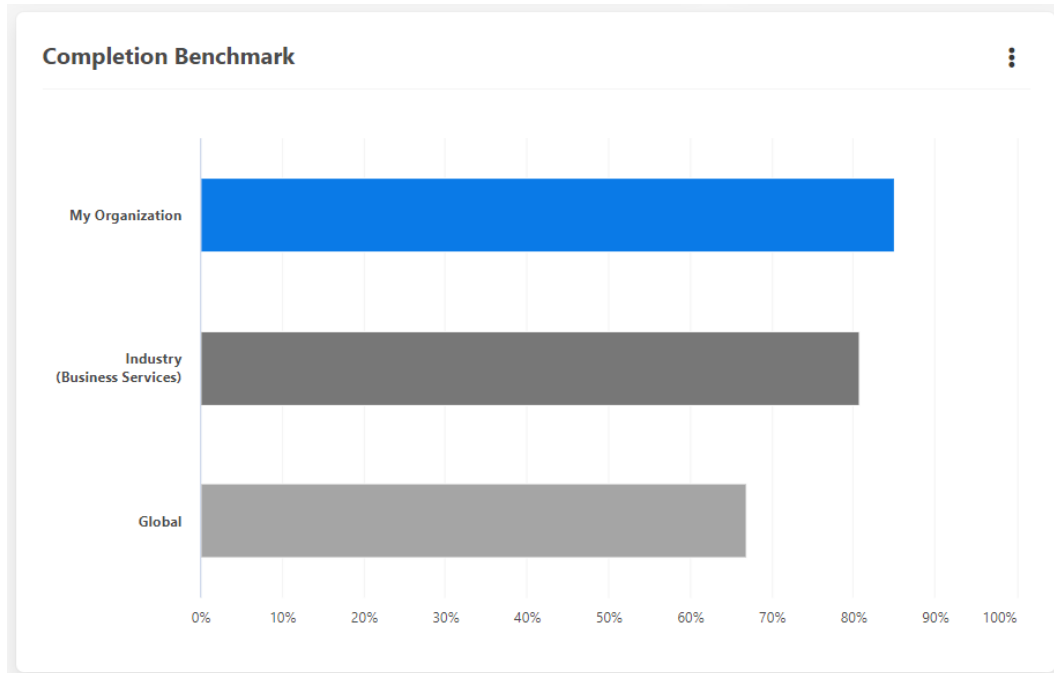
Leaderboard

	Name	Completed Date	Points
1	Steven McDaniel Preventing Discrimination & Harassment: CA/CT Ma...	03/20/2017	95,400
2	Terri Pallatta Preventing Discrimination & Harassment: CA/CT Managers	12/01/2016	92,400
3	Gareth Johnson Preventing Discrimination & Harassment: CA/CT Ma...	02/01/2017	90,300
4	Colette Luckie Preventing Discrimination & Harassment: CA/CT Managers	04/23/2018	90,000
5	Brandy Galea-Hertrich Preventing Discrimination & Harassment: Managers V1.31	08/17/2017	80,400
6	Nancy Shambaugh Preventing Discrimination & Harassment: Managers Indus...	08/26/2017	80,400
7	Karin Johnson Preventing Discrimination & Harassment: Managers V1.31	09/22/2017	80,400
8	Hope Reeves Preventing Discrimination & Harassment: Managers Indus...	01/30/2018	80,400

1 2 3 ... 60 < >

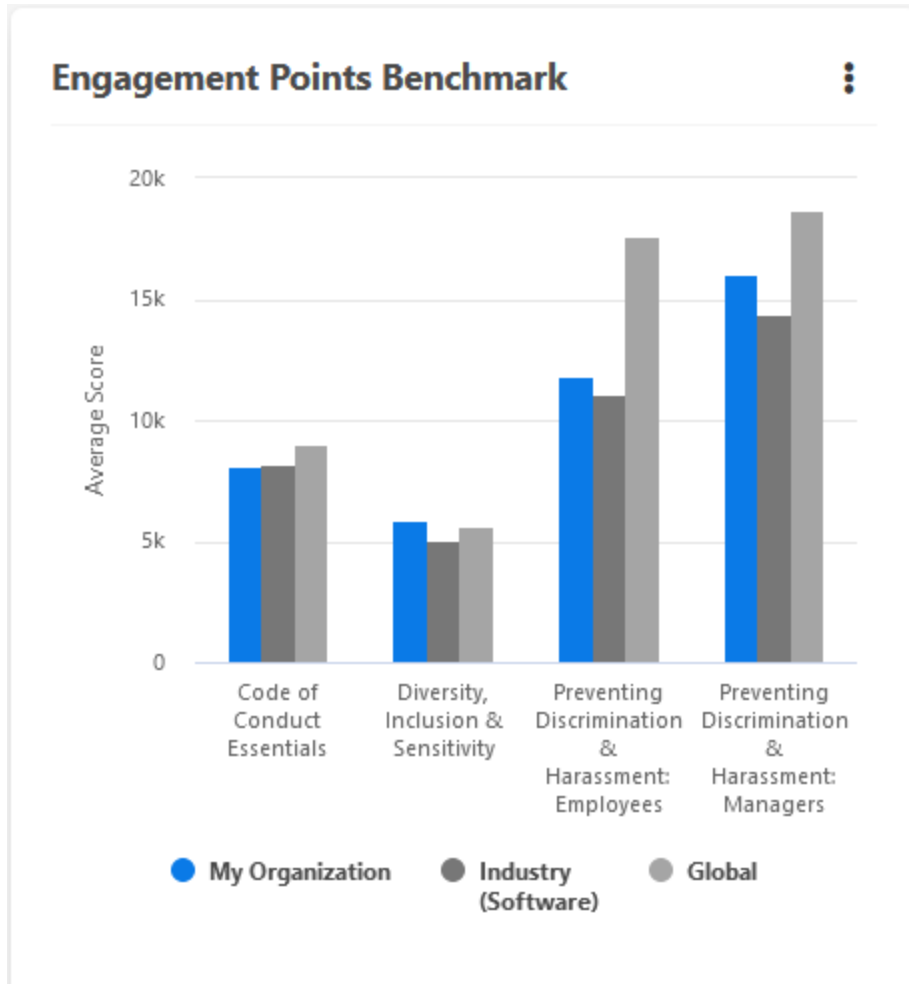
Completion Benchmark Report

See how your organization's completion rate compares to others in your industry, and across all companies.



Engagement Points Benchmark Report

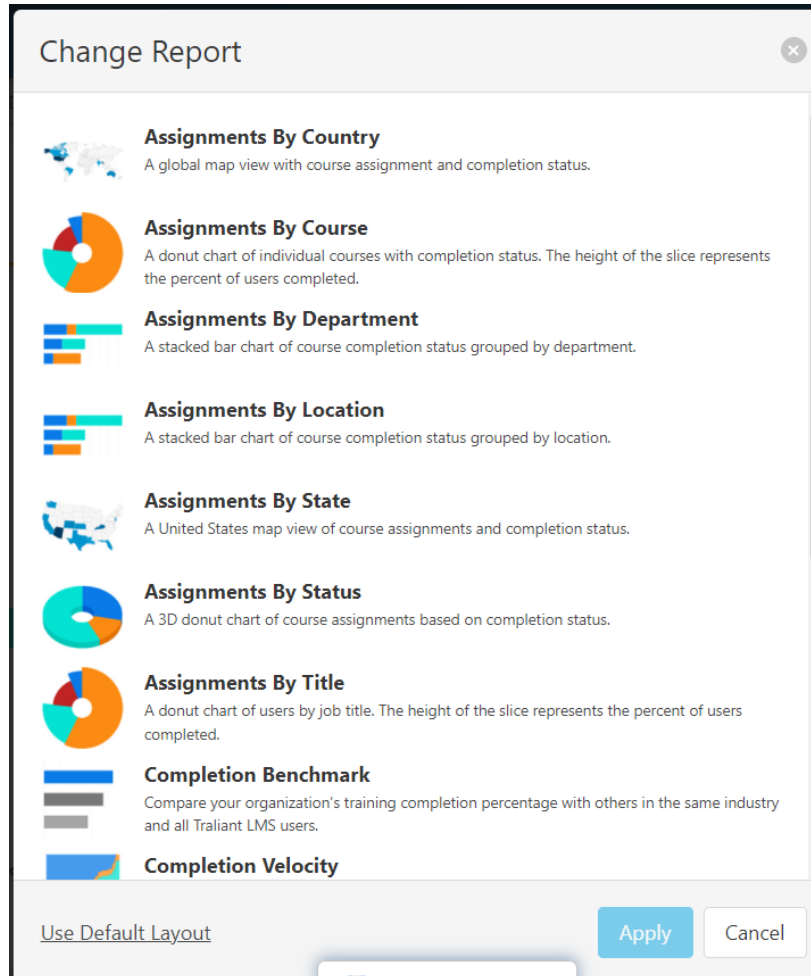
See how your organization's engagement points compares to others in your industry, and across all companies, for those courses that incur points.



Reporting Dashboard Customization

The graphic images on the Reporting Dashboard can be customized to your needs, from a variety of available options.

Each graphic image has three dots in the upper right corner. By clicking on the dots, you have the option to remove the report, or change the report. Clicking on Change Report will bring up the list of available reports, from which you can select, and APPLY



In addition, you can scroll to the bottom of the reports and select the “+” to add additional reports to your customized view. Any changes you make to your view will be saved, and are linked to your personal profile.

Automated Email Reports



Providing the ability to have scheduled status reports sent to system administrators (Company Manager, Department Manager, Reviewers) on a regular frequency (Weekly, Biweekly, or Monthly) via email. When this feature is enabled for a company, all system administrators for that company will receive the automated reports. Each administrator has the ability independently to opt out of reports.

Report will show a recap by course of Open Assignments and Completed Assignments.



Hi CompanyMgr1,

Here's a quick look at how people are doing with their assigned training.

Preventing Discrimination & Harassment: Employees V3.2			
	Current	Last Week	Past Due
Open Assignments	527 ↓	632	0
Completed Assignments	708 ↑	603	
Preventing Discrimination & Harassment: Managers V3.2			
	Current	Last Week	Past Due
Open Assignments	32 ↓	41	5
Completed Assignments	11 ↑	2	
Anti-Bribery & Anti-Corruption			
	Current	Last Week	Past Due
Open Assignments	128 ↓	273	15

And provides a link to the Reporting Dashboard for additional detail, and a link to the LMS, and Support for assistance

[See latest status details](#)

Report data as of 1/24/2022 sent weekly.

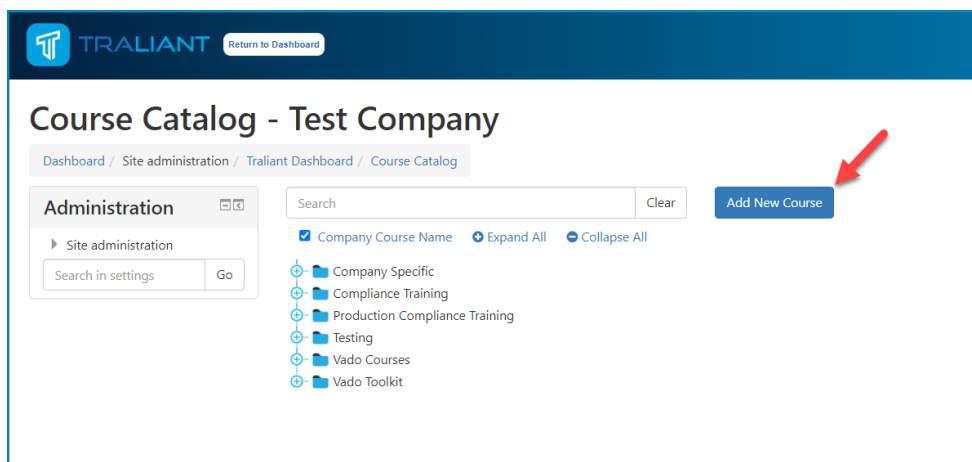
Log into the [Traliant LMS](#) or contact [Traliant Support](#) with any questions with this report or if there's anyway we can help.

Uploading Custom Courses

LMS as a Service is the ability for our clients to host their custom or proprietary training on the Traliant LMS. These courses can easily be uploaded in SCORM, AICC, PDF, MP4 or PowerPoint format. Courses loaded on the Traliant LMS can be assigned in the same fashion that Traliant courses are assigned, using a default notification configuration, with assignment and reminder notifications. In addition, the completions will be tracked, and can be reported via the Reporting Dashboard.

Loading Courses

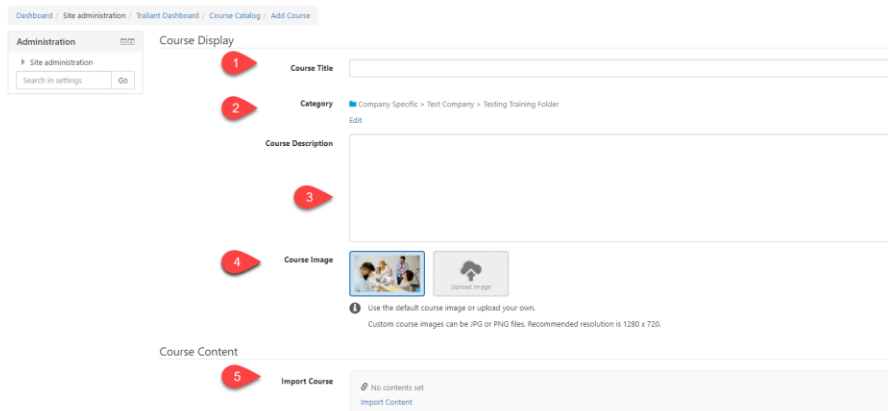
Once you have subscribed to LMS as a Service, your account will be enabled to upload courses to your company course catalog. Click on **Add New Course**.



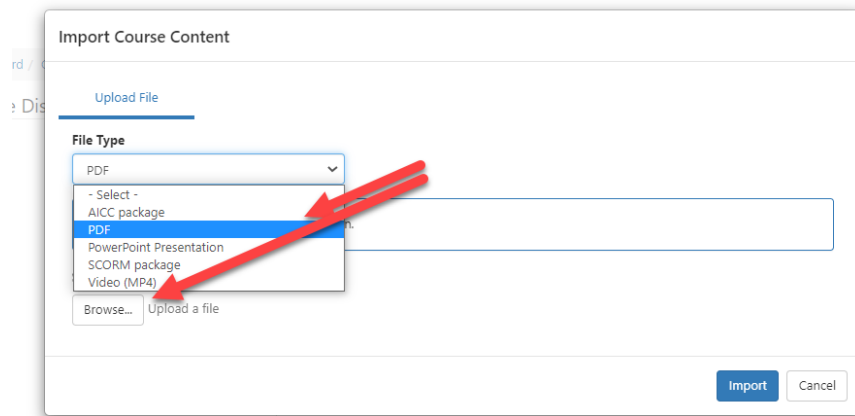
You will then be prompted for the course details, including

1. Course Title
2. Category (select from available option(s))
3. Course Description – You may add any text description for the course
4. Course Image – You can load an image reflective of your course. This will appear on the user dashboard when the course is assigned
5. The final step is to Import Course itself, by selecting Import Content

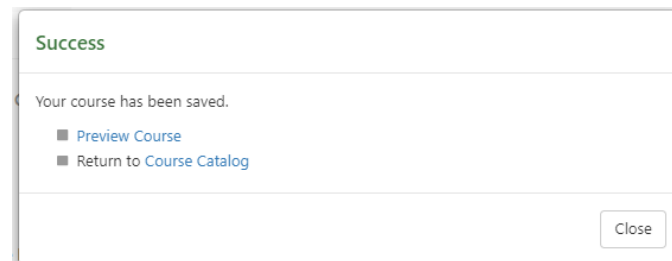
Add Course



Select the file type, then Browse to select the file from its stored location, then select Import.

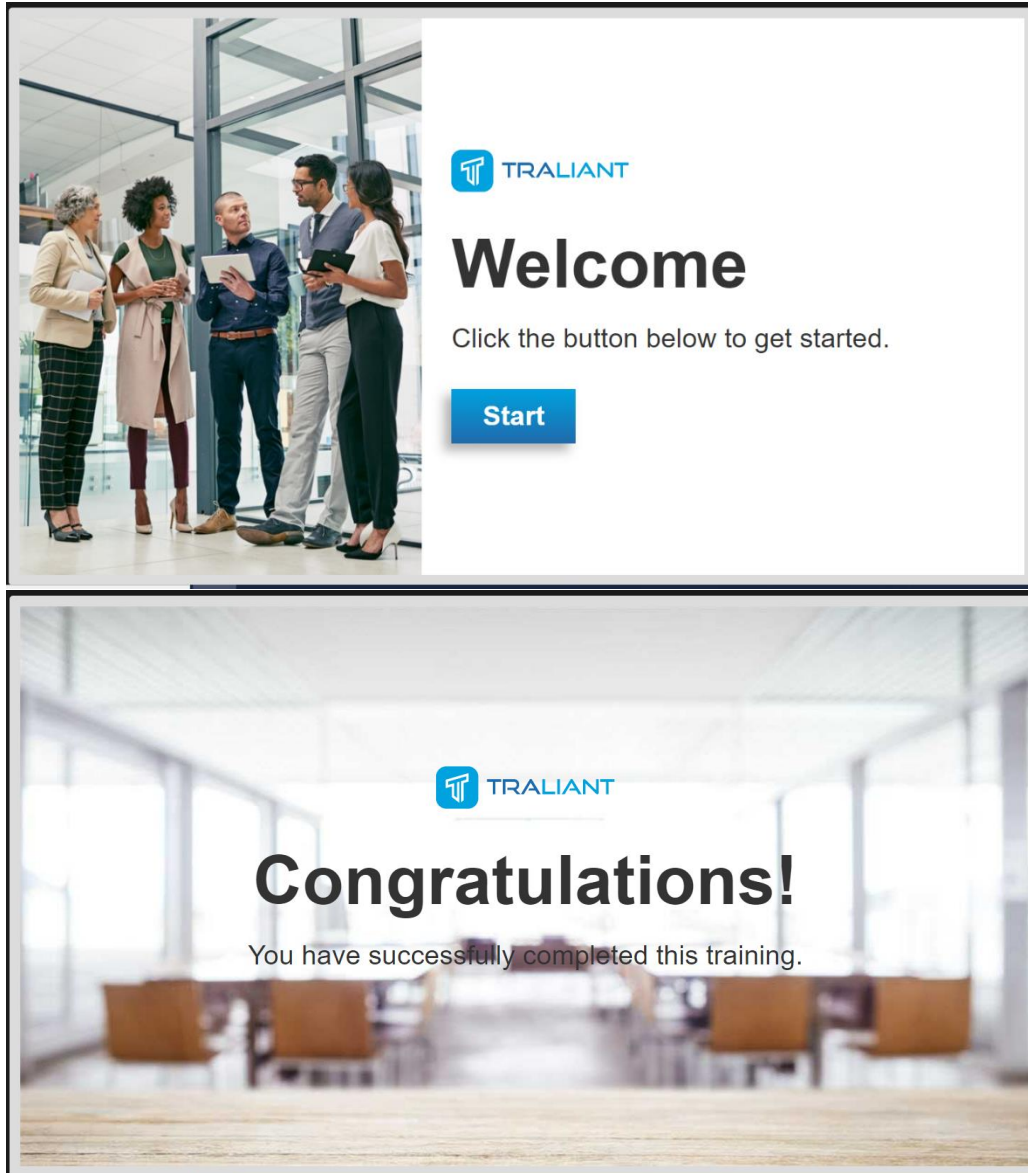


Once the file has been loaded, click Save. You will be prompted to Preview, or return to Course Catalog. At this point, your course(s) can be assigned.



How does your course look?

The content you upload is placed between and INTRO and COMPLETION slides, shown below:



APPENDIX

Traliant LMS Admin Access Levels

	Student	Reviewer (can perform the admin functions checked below for users in their own department)	Department Manager (can perform the admin functions checked below for users in their own department)	Company Manager (can perform the admin functions checked below for all users)
Has access to the Student Dashboard and can take own training	✓	✓	✓	✓
Has access to the Admin Dashboard and can...	Edit user records including giving up to own level of admin access to other users	✓	✓	✓
	Resend assignment and reminder emails	✓	✓	✓
	View course assignment and completion reports	✓	✓	✓
	Add and deactivate users		✓	✓
	Assign courses and schedule reminders		✓	✓
	Bulk download existing users and bulk upload new users		✓	✓
	Add, edit and delete email templates			✓