



## Coast Guard Portal Manager Permissions Guide

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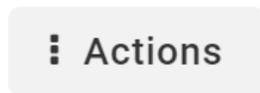
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## Adding Staff Accounts

Select 'Users' from the left menu:

The screenshot shows a dashboard for the 'Foundations of Inclusion eSeries'. On the left is a navigation menu with 'Users' highlighted. The main content area features a header with the title 'Foundations of Inclusion eSeries' and a lightbulb icon. Below the header is a paragraph of text and a 'Learn More' button. At the bottom, there are two cards showing '0 Enrolled Courses' and '0 Completed Courses', and a message: 'Currently you have not been enrolled in any courses. Why not browse the catalog to find some courses you would like to take.'

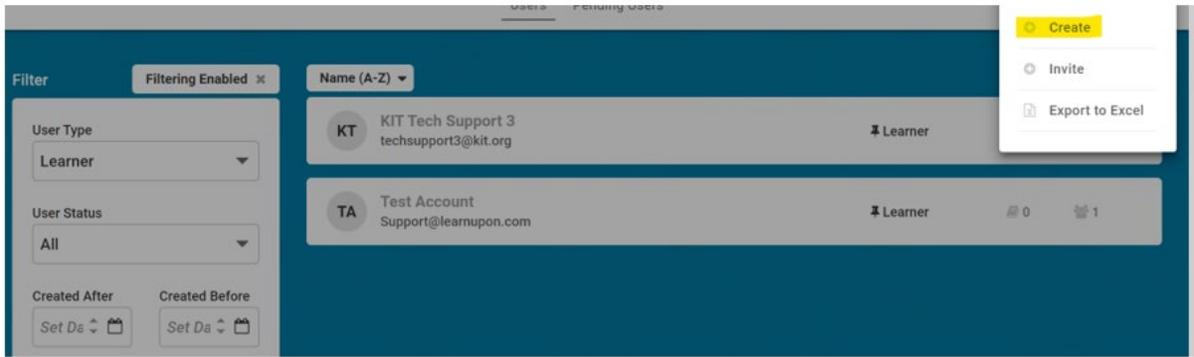
Select Actions (with the 3 dots) from the right side of the screen:



The screenshot shows the 'Users' management page. The left navigation menu is visible. The main content area has a search bar and a 'Users' tab. Below the search bar is a table of users with filters on the left. The table lists two users: 'KIT Tech Support 3' and 'Test Account'. The filters include 'User Type' (set to 'Learner'), 'User Status' (set to 'All'), and 'Created After/Before' (set to 'Set Da').

Name (A-Z)	User Type	User Status	Created After	Created Before
KIT Tech Support 3 techsupport3@kit.org	Learner	All	Set Da	Set Da
Test Account Support@learnup.com	Learner	All	Set Da	Set Da

Select **Create** from the menu:



Fill in the Users First Name, Last Name, and email they will use to login.

Toggle **off** the 'Send invite to users' because emails can go in the junk folder or get bounced back.

A screenshot of the user creation form. On the left, there is a 'Users Tips' section. The main form has fields for 'First Name', 'Last Name', and 'Email Address'. Below these fields is a section for 'Type of User & Permissions'. Underneath, there is a note: 'Note: If user already exists in one of your portals, their existing password will not be updated'. A toggle switch for 'Send invite to user?' is shown, with a red 'X' over it and an arrow pointing to the 'off' position. Below the toggle, there is a text box explaining the toggle's function. At the bottom, there is a 'Set Expiry Date for this user' toggle and an 'Account Expiry Date' field.

Enter a Password

Confirm the Password

\*Write down the password to give to users.

Toggle ON the 'User must change password on login.'

The screenshot shows a user management form with the following elements:

- Two password input fields labeled "Enter Password" and "Confirm Password", both highlighted in yellow.
- A toggle switch for "User must change password on login". The left side is disabled (grey), and the right side is enabled (green). An orange arrow points from the disabled side to the enabled side.
- A note below the toggle: "You will need to communicate the login details to the user by your own mechanisms, passwords are not sent automatically to the user."
- A toggle switch for "Set Expiry Date for this user", which is disabled (grey).
- An "Account Expiry Date" field containing the date "09/06/2022", which is crossed out with a large orange 'X'.
- A green "Save" button at the bottom right.

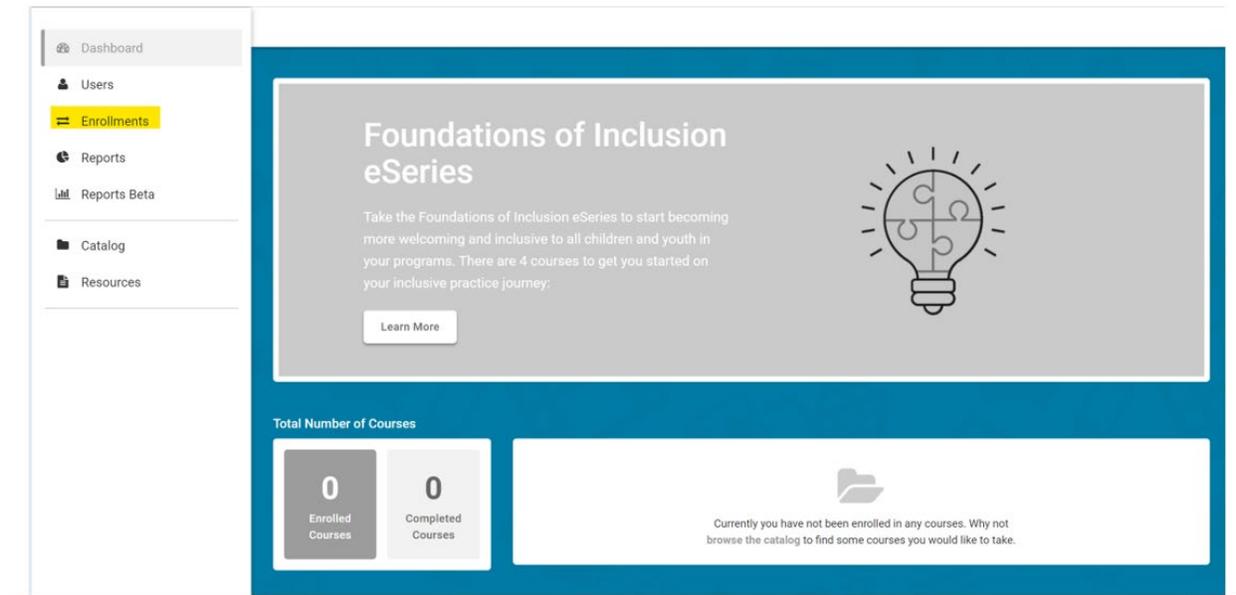
Ignore the 'Account Expiry Date' field.

The remaining fields on the screen do not need to be filled in because the learner will fill those out.

Do not forget to click 'save' at the bottom right of the screen.

# Assigning Training Modules

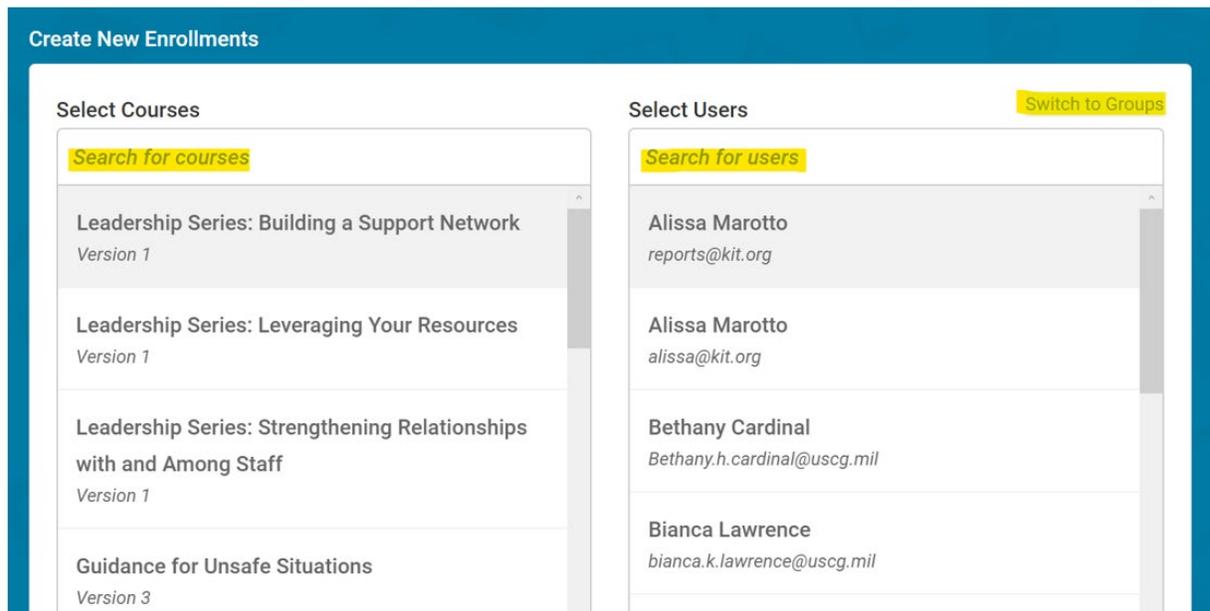
From the Dashboard select 'Enrollments' from the left menu.



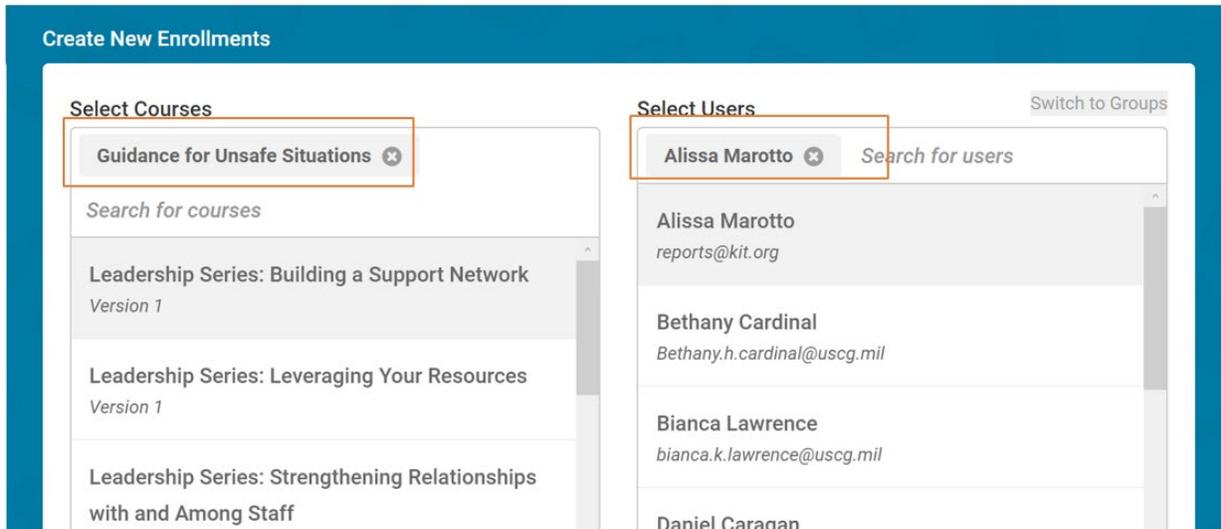
Under 'Select Courses' start typing the name or part of the name of a course.

Select the course or courses that you would like to enroll a learner, learners, or group into.

Under 'Select Users' start typing the name of a user (staff) and select the user/s.



In this example we selected the Guidance for Unsafe Situations course and added Alissa Marotto.

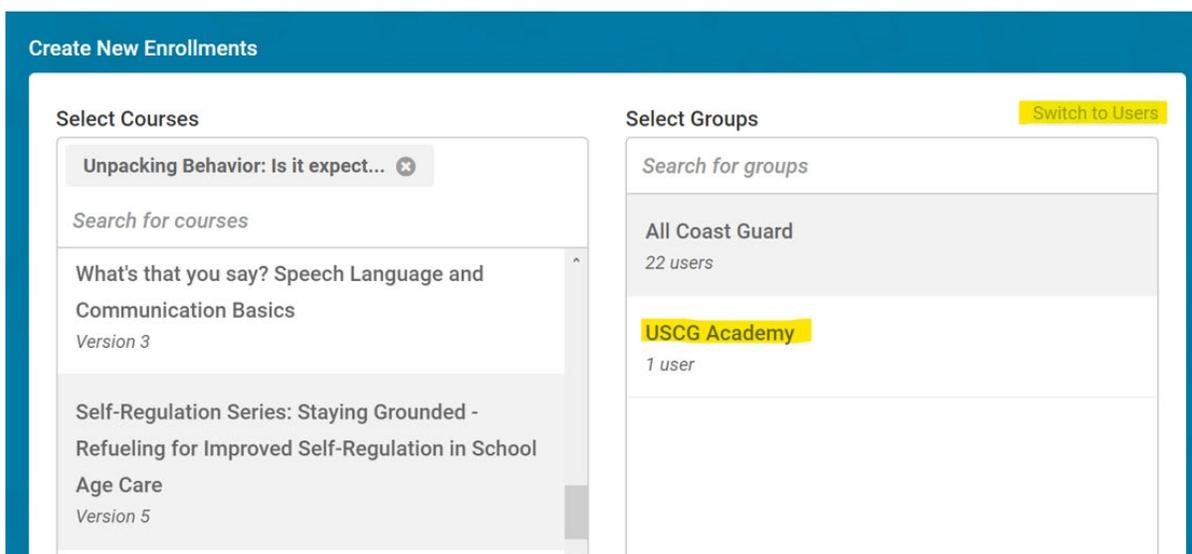


\*Don't forget to select ENROLL at the bottom right corner before you leave the screen.



You can also Switch to Groups if you would like to enroll your entire Station/Group into a course.

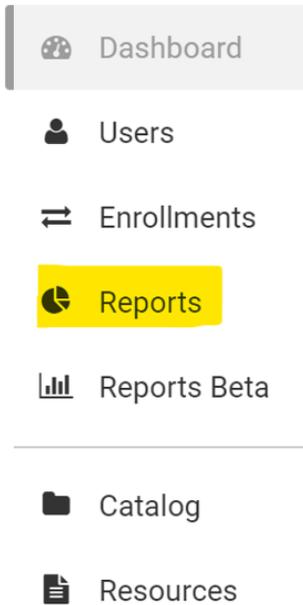
Select 'Switch to groups' in the upper right hand of the selection menus. See below:



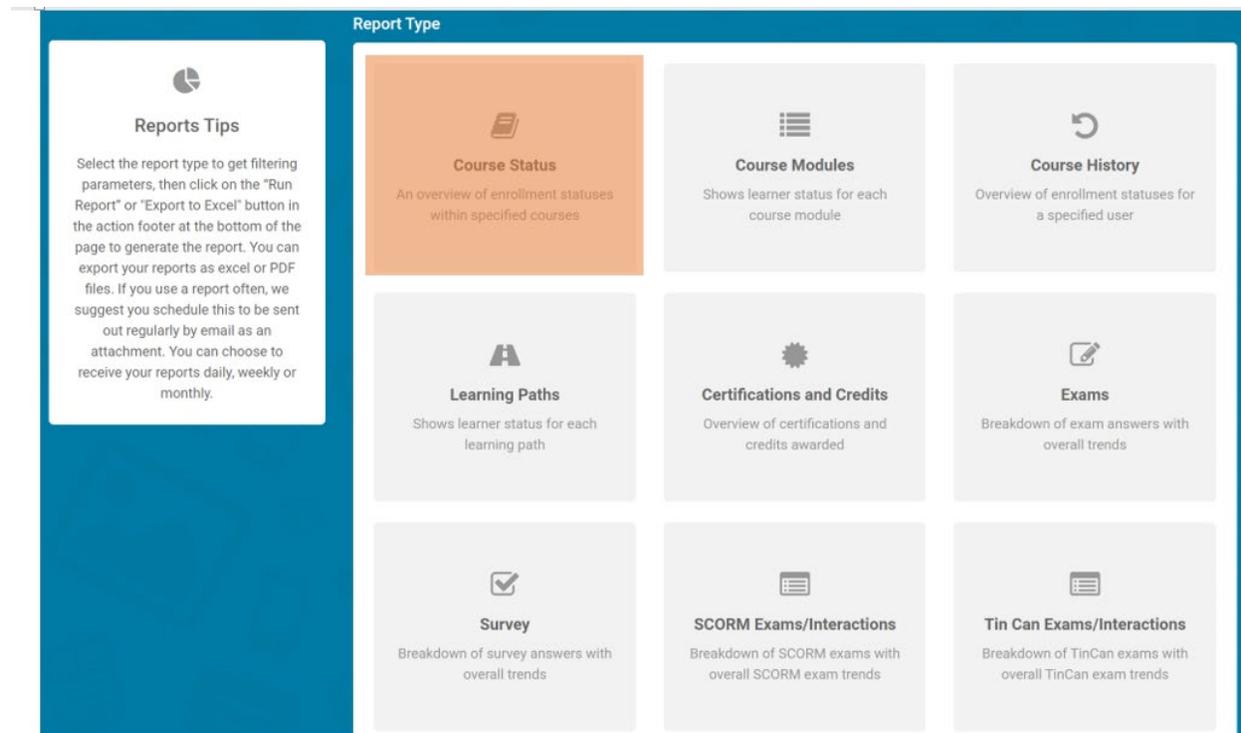
Once again, don't forget to select ENROLL at the bottom right of the screen.

# Tracking Completion with Reports

Select 'Reports' from the left-side menu.



Select 'Course Status' under Report Type



There are a variety of ways to search reports. In this example, we will look at the learners who completed the **Guidance for Unsafe Situations** course. Please note that if you see 'v. 1' or 'v. 2' etc. next to a course name, you probably want to pick the highest number because it represents the most recent version of the course.

Report Type will be defaulted to 'Course Status'

Choose a date range if needed

Start typing a course name and then select the course.

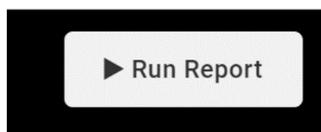
Choose the group that you would like to run the report on.

Choose the status you are interested in, such as 'passed.'

The screenshot shows a 'Filters' panel with several sections:

- Reports Tips:** A box on the left with a pie chart icon and text explaining how to use the report type to filter and export data.
- Report Type:** A dropdown menu currently set to 'Course Status'.
- Date From / Date To:** Two date selection fields, each with a 'Set Date' button and a calendar icon.
- Courses:** A search box labeled 'Search by course name' and a list of course titles. The top item is 'Guidance for Unsafe Situations v.3', which is highlighted. Other items include 'Guidance for Unsafe Situations v.2', 'Guidance for Unsafe Situations v.1', 'Infant/Toddler Series: Safe Ways to Meet the Need to Climb v.1', and 'Partnering with Families (Course 4 Foundations of Inclusion eSeries) v.3'.
- Groups:** A dropdown menu with 'All Coast Guard' and 'USCG Academy' (highlighted).
- Statuses:** A dropdown menu with options: 'Pending Review', 'Completed', 'Passed' (highlighted), 'Failed', and 'Past Due'.
- User Status:** A dropdown menu with 'Login enabled' (highlighted) and 'Login disabled'.

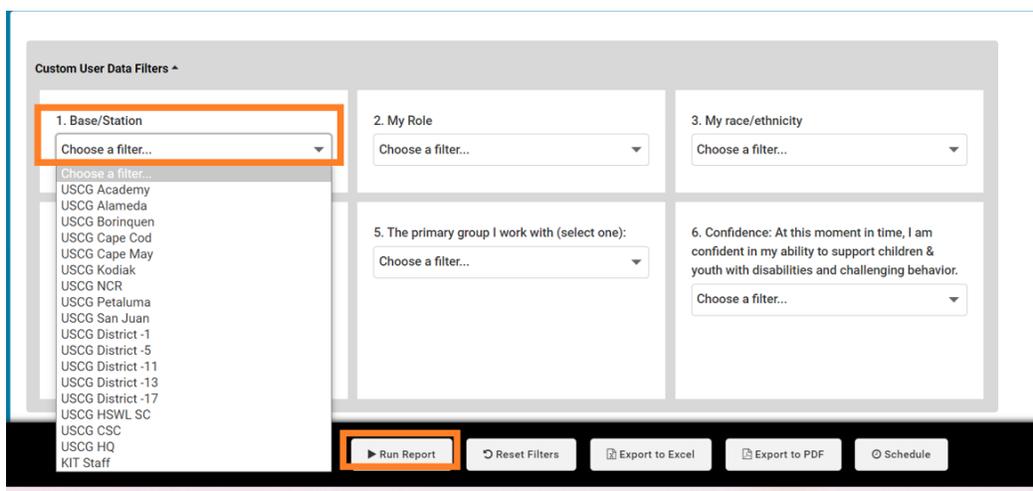
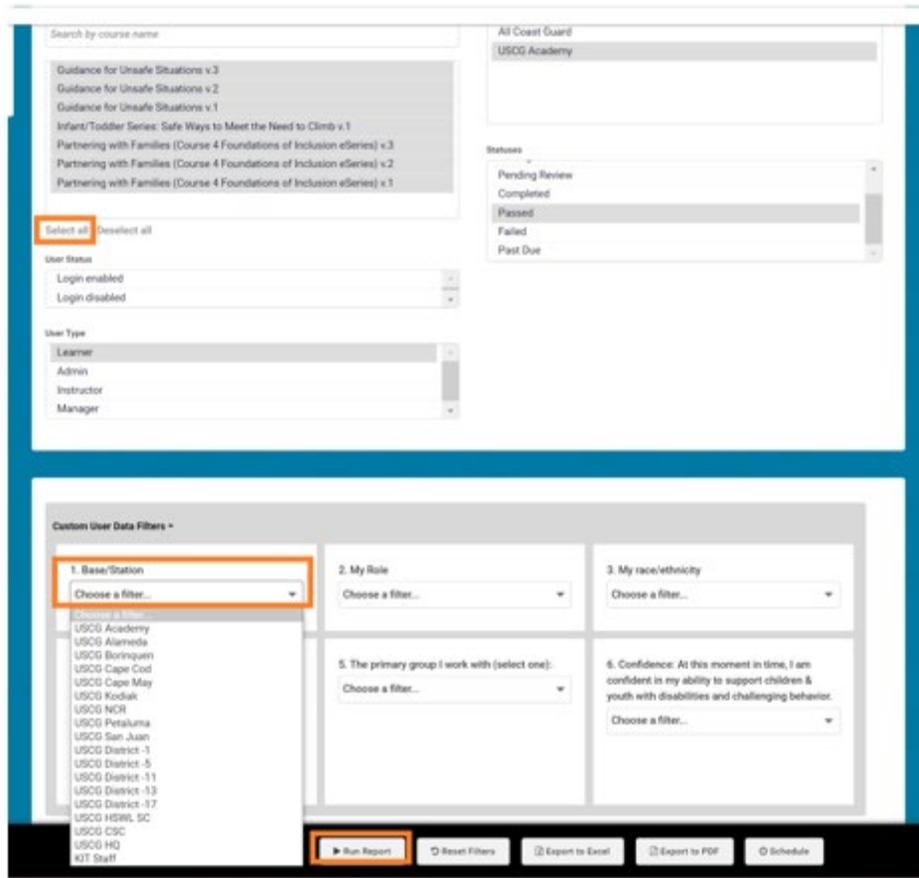
Once you have the items selected, click on Run Report from the bottom of the screen:



Alternatively, you can 'Select All' from the course menu.

Choose your other options such as 'User Type' or 'Status' and then you can filter for your group, either by selecting the group from the dropdown menu on the right or you can scroll down on the screen and use the 'Customer User Data Filters' and select the Station/Group from there.

And then Run Report on the bottom of the screen.



Once you click on Run Report, you will see all of the learners from the group or station you selected that 'passed' any of the courses. The report will look something like this:

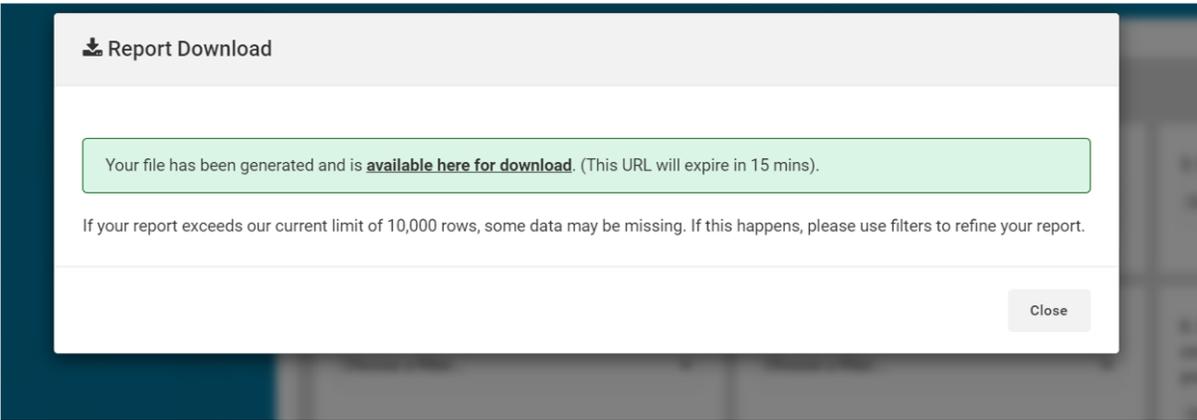
Guidance for Unsafe Situations v.3							
<input type="checkbox"/>	Name	Email	Enrolled	Started	Completed	Score	Status
<input type="checkbox"/>	Jules Test	[REDACTED]	09/06/2022	09/05/2022	09/05/2022	100%	Passed

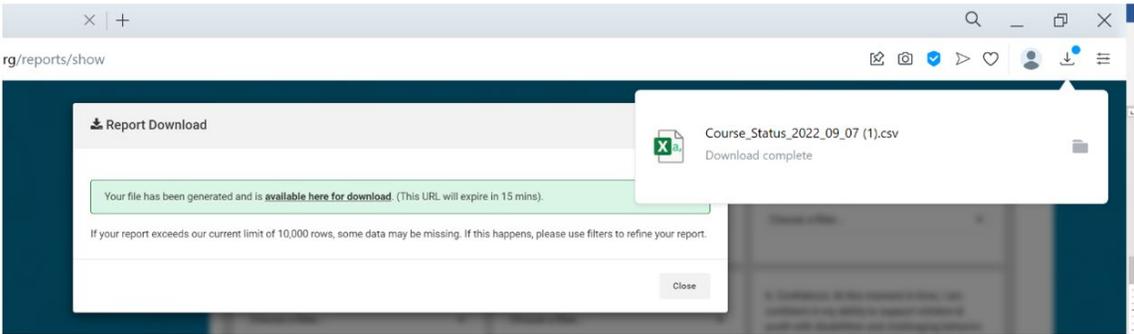
Infant/Toddler Series: Safe Ways to Meet the Need to Climb v.1							
<input type="checkbox"/>	Name	Email	Enrolled	Started	Completed	Score	Status
<input type="checkbox"/>	Jules Test	[REDACTED]	09/06/2022	09/02/2022	09/02/2022	100%	Passed

You can also choose to export to 'Export to Excel' from the bottom menu.

A message will pop-up that your Report will be ready to download:



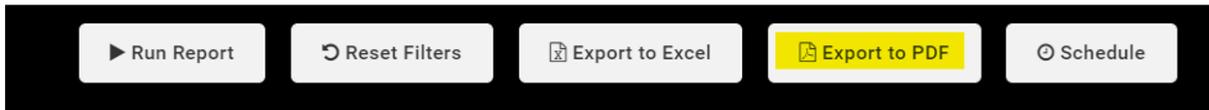
It will vary by computer, however, you may see the 'download complete' on the upper corner of your computer screen.



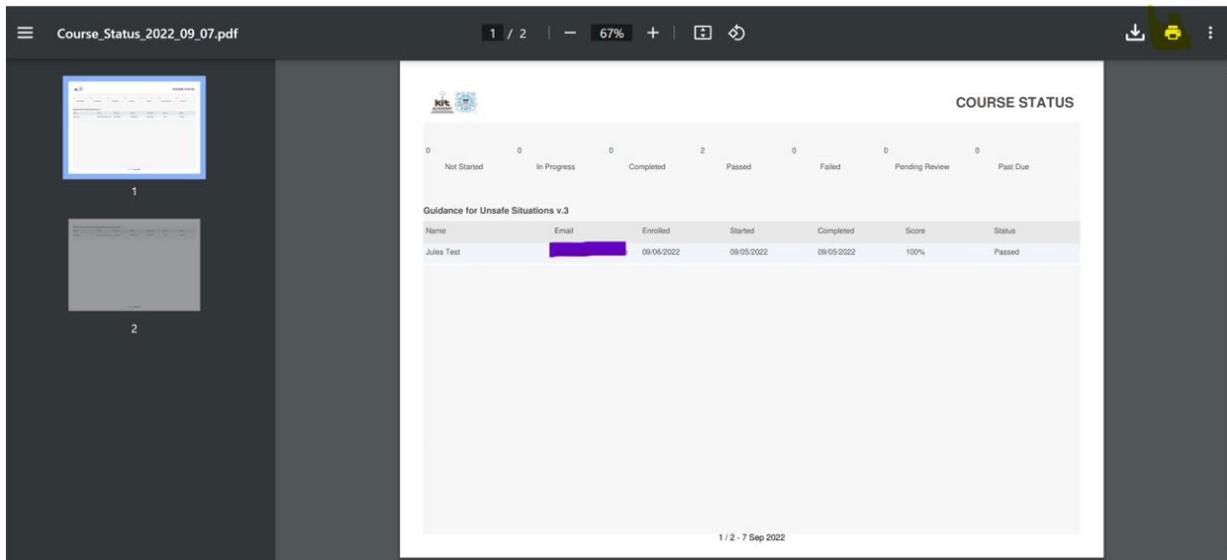
Select the file from your downloads and open up the Excel Spreadsheet and it will look similar to this:

1	Not Started	In Progress	Completed	Passed	Failed	Pending Review	Past Due														
2	0	0	0	2	0	0	0														
3																					
4	First Name	Last Name	email	enabled	expires	Course nar	course ref.	enrolled	source	due date	started	Last Acces	Last Acces	completed	Pass Mark	Score	Status	Can re-att	Percentag	Expiration	Base/St
5	Jules	Test	[REDACTED]	Yes	-	Guidance for Unsafe	9/6/2022	-	-	9/5/2022	9/5/2022	9/5/2022	9/5/2022	-	100%	Passed	No	-	-	USCG A	
6	Jules	Test	[REDACTED]	Yes	-	Infant/Toddler Series	9/6/2022	-	-	9/2/2022	9/2/2022	9/2/2022	9/2/2022	-	100%	Passed	No	-	-	USCG A	
7																					
8																					
9																					
10																					

Lastly, you can Export to PDF from the bottom menu:



Your PDF file will open up with the option to print on most computers. The printer icon can be seen in the upper right-hand corner of the screen in this example:



## Printing a Course Certificate

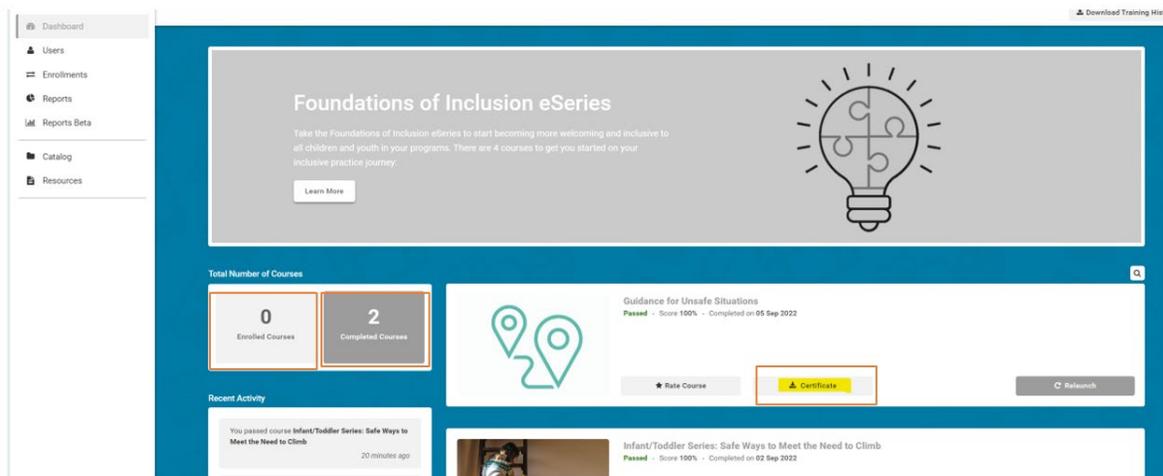
Go to the Dashboard

You will notice the Enrolled Courses and Completed Courses are displayed on the left side.

Select 'Completed Courses'.

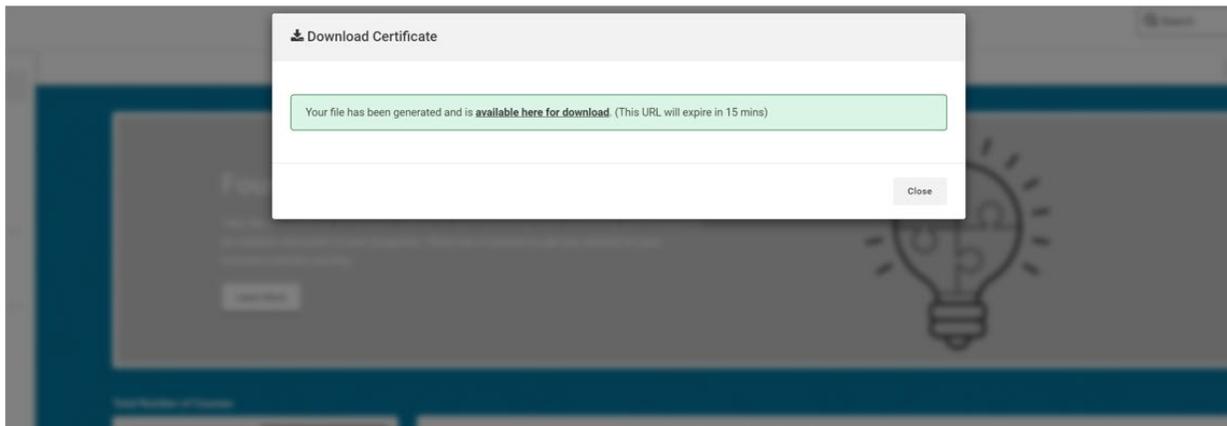
On the Right Side you will see the courses you have completed.

Click on 'Certificate'. You will notice it has the download icon.



The pop-up for 'Download Certificate' appears.

Click on the link in bold 'available here for download.'



After you click on the link for download the certificate will appear in your download files and you can select it to see your certificate:

# Certificate of Achievement



THIS CERTIFICATE IS PRESENTED TO:

**Julie Halick**

FOR THE COMPLETION OF:

**Partnering with Families (Course 4  
Foundations of Inclusion eSeries)**

Kids Included Together is authorized by IACET to offer **0.1 CEU Credits** for this training.

A handwritten signature in black ink, appearing to read "Torrie Dunlap", is written over a horizontal line.

06/03/2022

**Torrie Dunlap, CPLP** | Kids Included Together, CEO  
2620 Roosevelt Road, Suite 202  
San Diego, CA 92106

Date



Kids Included Together is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU. 21610 Ridgeview Circle, Suite 170, Sterling, VA 20166

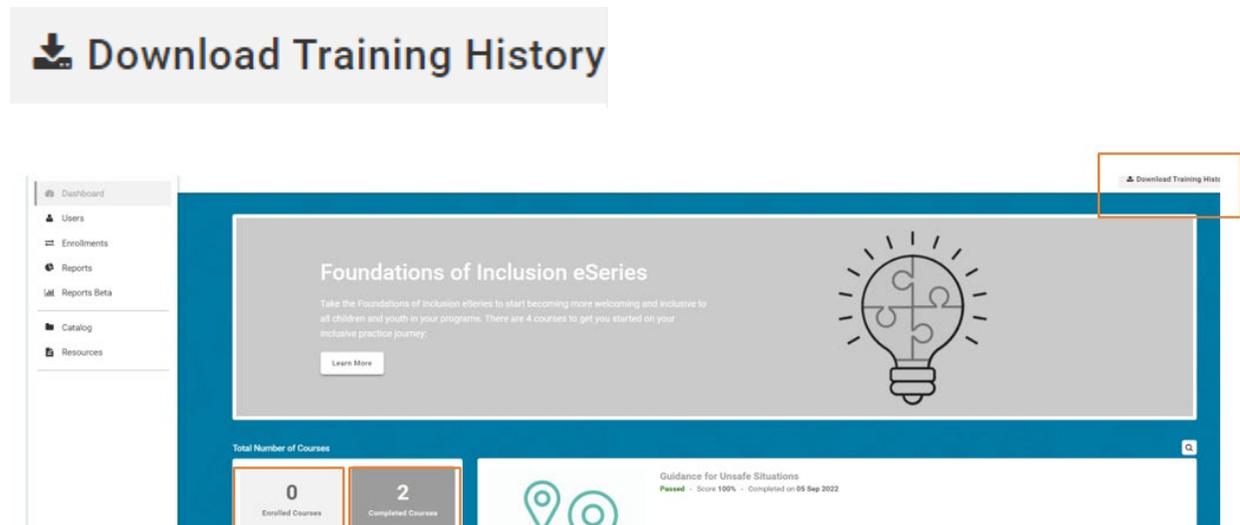
# Downloading the Training History

Follow the same steps for certificate.

Dashboard

Completed Courses

Instead of selecting certificate, select the 'Download Training History' link in the top right corner.



A report will look something like this:

Course Name	Status	Enrolled	Completed	Score	Pass/Fail
Partnering with Families (Course 4 Foundations of Inclusion eSeries)	Completed	10/27/2021	06/03/2022	100%	Passed
Infant/Toddler Series: Resources/Q&A	Completed	08/17/2021	05/27/2022	-	-
Unpacking Behavior: Is it expected, challenging, concerning or unsafe?	Completed	09/30/2021	05/04/2022	100%	Passed
Emotional Literacy for Infants and Toddlers	Completed	01/26/2022	05/04/2022	100%	Passed
Army CYS Behavior Support Implementation: How to Write a Behavior Support Plan	Completed	09/23/2021	04/20/2022	100%	Passed
Connect and Redirect: A Strategy to Support Behavior	Completed	11/29/2021	11/29/2021	100%	Passed
Army CYS Behavior Support Implementation: Introductory Module	Completed	11/29/2021	11/29/2021	100%	Passed
Viewing Behavior as Communication (Course 3 of Foundations of Inclusion eSeries) - Formerly Supporting Positive Behavior	Completed	10/27/2021	11/05/2021	100%	Passed
USMC Behavior Support Process - Using the Behavior Tracking Tool to Identify Trends	Completed	10/29/2021	10/29/2021	80%	Passed
Partnering with Families (Course 4 Foundations of Inclusion eSeries)	Completed	10/25/2021	10/25/2021	100%	Passed
Supporting Positive Behavior (Course 3 of Foundations of Inclusion eSeries)	Completed	10/25/2021	10/25/2021	-	-
Respectful Accommodations (Course 2 of Foundations of Inclusion eSeries)	Completed	10/21/2021	10/25/2021	90%	Passed
The Value of Disability Inclusion (Course 1 in Foundations of Inclusion eSeries) - Formerly Introduction to Inclusion	Completed	09/23/2021	10/21/2021	80%	Passed
On the Move: Bag OTricks	Completed	08/17/2021	08/17/2021	100%	Passed