# Compliance Learning Manager

## User Guide – Core Tasks

## ADDING USERS

In this task you are adding a single user to the platform.

**Note:** You can add multiple users by importing a .CSV file; for import instructions, see *Importing New Users*.

1. Click ⚙.
2. On the **Manage your LMS** page, under **E-Learning**, click **Users**, and then click ⊕ followed by 👤.
3. On the New user page, fill in all required User Profile fields, click **Next**.
4. Toggle through the branches, and using the check boxes place the user in the required branch, click **Next**.
5. Fill in any additional fields, click **Next**.
6. Click **Review**.
7. Click **Create User**. Your user is activated and ready for enrollment.
8. If you want to enroll the user in a course, on the **What's next?** page, click **Enroll user to courses and learning plans**, select the courses you wish to assign and click **Next**.
9. If the courses are open for a specific period of time, select **Set enrollment deadlines**, and enter the **Active from** and **Active until** dates. Leave blank if there are no course deadlines.
10. Click **Confirm to assign** (if TR has set up notifications for you, these will be in place and sent to the user).

## ENROLLING USERS IN COURSES

As you add new users to the platform, you can enroll them in courses at the same time or you can enroll them at a later date. In this task we are enrolling users who were previously added but not enrolled.

**Prerequisite:** Work with Thomson Reuters Compliance Learning Operations to set up your email reminders and notifications.

**Note:** You can enroll users in courses by uploading a .CSV file; for these instructions, see *Enrolling via Import*.

1. Click ⚙.
2. On the **Manage your LMS** page, under **E-Learning**, click **Courses**, and then click ✓👤.
3. On the **Enroll users** page, select all the users you wish to enroll and click **Next**. You can also enroll users via Branch, by clicking on **Branch** in the left-hand panel and then selecting the branches you wish to assign (e.g., particular departments or the entire business).
4. Select the course(s) and click **Next**.
5. For Level, select **Learner** from the dropdown.
6. If the courses are open for a specific period of time, select **Set enrollment deadlines**, and enter the **Active from** and **Active until** dates. Leave blank if there are no course deadlines.
7. Click **Confirm**.
8. After enrollment is complete, click **Close**.

## IMPORTING NEW USERS

To ensure your .CSV file meets the import requirements, download a sample .CSV file from the Users page. Then update the sample file with your information, save, and import into the program.

1. Click ⚙.
2. On the **Manage your LMS** page, under **E-Learning**, click **Users**, and then click ⬇ followed by CSV.
3. On the **Manage users via .CSV** page, click **Download sample .CSV file**.
4. Open the sample.csv file and replace information in that file with your user information. Leave the heading row.
5. Save the .CSV file, ensuring it remains a .CSV file.
6. On the **Manage users via .CSV** page, click **Choose File**, and navigate to your file.
7. For **Choose separator**, select the type of punctuation your .CSV file uses between fields.
8. If you are uncertain of the type of separator, leave the default, **Auto-Detect**.
9. If your .CSV file has a header row, select **Consider first row as header**.
10. Select your **File charset**. For most files, **UTF-8** is correct, and click **Confirm**.
11. On the left side under **Import Options**, toggle the buttons to select the desired options.
12. On the left side under **Destination Branch**, leave **Existing branch** selected. In your .CSV file the column "Branch" should contain the name of the branch where the users will be placed (this branch must exist).
13. Under **Thomson Reuters fields**, drag over the relevant fields that you want to import onto the drop zones under **Preview**.
14. Select **Import**.
15. An email will be sent to you to confirm the success of the import. You can also view **Background Jobs** on the **Manage your LMS**.

    ** As part of the import, users are activated.

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# ENROLLING BY IMPORT

Prior to importing your users, export the users to a .CSV file, then you can use that as your import file.

1. Click ⚙. ** 1.1 If you already have a list of users to import, jump to step 7.*
2. On the **Manage your LMS** page, under **E-Learning**, click **Users** and select your users (use the check boxes by their username to select).
3. On selected menu, click on **Choose Action**, and then **Export as .CSV**.
4. Select **Include column names in the first row**. Under **Select User Fields**, check **Username**.
5. Click **Export .CSV file**.
6. Open and save the .CSV file, ensuring it remains a .CSV file.
7. On the **Manage your LMS** page, under **E-Learning**, click **Courses**.
8. Locate the course and click the people icon in the **Enrolled** column (if no users are enrolled, this will read **ENROLL**).
9. Click **Enroll from .CSV** and browse to find the file.
10. Select **Consider first row as header**.
11. If there are enrollment deadlines, select the option and enter the **Active from** and **Active until** dates.
12. Click **Upload File(s)**.
13. Review the enrollment message and click **OK**.

# MANAGING BY IMPORT

Prior to importing your users, export the users to a .CSV file, then you can use that as your import file.

1. Click ⚙. ** 1.1 If you already have updated information in a .CSV file, jump to step 7.*
2. On the **Manage your LMS** page, under **E-Learning**, click **Users** and select your users (use the check boxes by their username to select).
3. On selected menu, click on **Choose Action**, and then **Export as .CSV**.
4. Select **Include column names in the first row**. And under **Select User Fields**, check **Username**, alongside any other fields you will wish to change (e.g., First Name or email).
5. For Choose separator, select the type of punctuation to separate each field.
6. Click **Export .CSV file**.
7. Open the .CSV file, update and save the information ensuring it remains a .CSV file.
8. On the **Manage your LMS** page, under **E-Learning**, click **Users**, and then click ⬇ followed by CSV.
9. On the **Manage users via .CSV** page, click **Choose File**, and navigate to your file.
10. For **Choose separator**, select the type of punctuation your .CSV file uses between fields.
11. If you are uncertain of the type of separator, leave the default, **Auto-Detect**.
12. If your .CSV file has a header row, select **Consider first row as header**.
13. Select your **File charset**. For most files, **UTF-8** is correct, and click **Confirm**.
14. On the left side under **Import Options**, toggle the buttons to select the desired options. In this instance you want to turn on **Update information for existing users**.
15. On the left side under **Destination Branch**, leave **Existing branch** selected.
16. Under **Thomson Reuters fields**, drag over the relevant fields that you want to import onto the drop zones under **Preview**.
17. Select **Import**.
18. An email will be sent to you to confirm the success of the import. You can also view **Background Jobs** on the **Manage your LMS**.

# ACTIVATING/DEACTIVATING BY IMPORT

When you activate or deactivate users by uploading a .CSV file, the file contains two columns, one with the usernames and one with Active which should be set to 0 = deactivated 1 = activated.

1. Click ⚙.
2. On the **Manage your LMS** page, under **E-Learning**, click **Users** and select your users (use the check boxes by their username to select).
3. On selected menu, click on **Choose Action**, and then **Export as .CSV**.
4. Select **Include column names in the first row**. Under **Select User Fields**, check **Username**.
5. Click **Export .CSV file**.
6. Open the .CSV file, and in column B label it "Active" and enter **0 to deactivate** or **1 to activate** each user. Save the information, ensuring it remains a .CSV file.
7. On the **Manage your LMS** page, under **E-Learning**, click **Users**, and then click ⬇ followed by CSV.
8. On the **Manage users via .CSV** page, click **Choose File**, and navigate to your file.
9. For **Choose separator**, select the type of punctuation your .CSV file uses between fields.
10. If you are uncertain of the type of separator, leave the default, **Auto-Detect**.
11. If your .CSV file has a header row, select **Consider first row as header**.
12. Select your **File charset**. For most files, **UTF-8** is correct, and click **Confirm**.
13. On the left side under **Import Options**, toggle the buttons to select the desired options. In this instance you want to turn on **Update information for existing users**.
14. On the left-side under **Destination Branch**, leave **Existing branch** selected.
15. Under **Thomson Reuters fields**, drag over the relevant fields that you want to import onto the drop zones under **Preview**.
16. Select **Import**.
17. An email will be sent to you to confirm the success of the import. You can also view **Background Jobs** on the **Manage your LMS**.

* This can also be done for one or many users:

1. On the **Manage your LMS** page, under **E-Learning**, click **Users** and select your users (use the check boxes by their username to select).
2. On selected menu, click on **Choose Action**, and then select **Activate** or **Deactivate**.

* This can also be done for individuals users:

1. On the **Manage your LMS** page, under **E-Learning**, click **Users**.
2. Click on the green tick in the status column. **A green tick = active**, **no green tick = deactivate**. You can toggle between each status by simply clicking on this icon.

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