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Home Page
The Home page shows courses that are in progress or courses that you need to complete.

Amend your details and change your password via the MY PROFILE section.

This is the Home page for a User.

The Home page is tailored to your access as either a User or an Administrator.
• A full list of Course Assignments can be found by scrolling down the Home page.
• Quick access to the Support page via the Need Support? box.
• Future course deadlines can be viewed on the calendar.
• View course statistics for your users instantly.
• Future course deadlines can be viewed on the calendar.
• Amend your details and change your password via the MY PROFILE section.
• Scroll down to jump to the Reporting & Tracking dashboard.

• This is the Home page for an Administrator.
• Click the gear icon to access the Admin Menu.
• A dedicated Administrator Resources page can be accessed by clicking here.
Find useful information for administrators on this page including:

- Upcoming Compliance Learning Course Releases and Compliance Learning Course Catalog
- this Administrator Guide
- the Compliance Learning showcase
- System status

Access the main Support page and contact details via Need Support?
The Support page is available to both Users and Administrators and contains helpful guides and documentation. Should you still require assistance, a full list of contact details is available under **Contact Us**, as you scroll down.
The Dashboard
In this section we will focus on the highlighted areas.

- Select **Dashboard**.
The Dashboard allows you quick access to:

- View a user’s personal summary (this will give you access to their activity in the system).
- Change a user’s password (this can also be changed by editing a user’s profile – we will look at this shortly).
- Enroll users in any course available to you on the system.

You can review the user activity for specific periods. Select a Date range here.

You can also download any available reports.
A further view of the information available on the Dashboard is listed here.
Managing Users
In this section we will go over user management.

Select Users.
By default, you will only see users who are in the branch selected on the left-hand panel. To show all users regardless of branch, ensure the **Show users in sub-branches** button is toggled on.

Search a user by their username.
To get an overview of a user’s activity:
- Locate the user in the list on the right-hand panel.
- Click the ellipsis (three dots)
- Click User personal summary
A quick overview of the user's activity is listed here.

If you wish to see a further breakdown of the courses the user has completed, click Courses.
• All course activity will be listed here.
• Use the Search bar above to browse through other users.
To edit a user's details, follow these steps:
• Locate the user in the list on the right-hand panel
• Click the ellipsis
• Click Edit
- Change the details as necessary (e.g. password).
- Click UPDATE, or if you also wish to add this user to a different branch, click NEXT.
• Select the branch you want this user to belong to.

• Click UPDATE, or if you also wish to edit additional information for the user, click NEXT.
- Change the details as necessary (e.g. Employee ID).
- Click UPDATE to save your changes.
To add a single user to the system, simply follow these steps:

- Click the green plus sign.
Click the New user icon.
The first step is to fill out key information.

Username and password are mandatory.

Toggle this button on to force a password change on first sign-in.

Toggle on Activate user... if you wish them to be immediately active.

You can also send this user a notification that they have been created in the system. Please turn this off if you don’t want to notify the user immediately; you may wish to wait until they are assigned a course. On assigning a course, the user will be notified with their username and details of how to set their password.
Once you have filled out this information and toggled the options as needed, click NEXT to progress.
• Place the user into the desired branch and click NEXT to progress.

• After this point, you’ll be able to add further information to the user’s profile via the Additional fields page. Please ignore the Subordinates page.
Once you have created the user, you can immediately enroll them into a course. Click the Enroll user to courses and learning plans button highlighted above.

If you want to enroll the user at a later date, simply click CONFIRM.
Select the course(s) you wish to enroll the user to and click NEXT.
Set the level as **Learner** and set any enrollment deadlines (these are not mandatory). Click **NEXT** to continue.
All notifications will be set up by Thomson Reuters and will be sent automatically on enrollment. Click CONFIRM.
The newly created user will appear at the top of the list. A green notification, at the bottom of the page, will let you know that the user was successfully enrolled.
You can also add users en masse as well as change details of existing users via a CSV file upload using the Import & Manage button. If you're interested in managing your users in this way, please reach out to Thomson Reuters for a training session.

All users have an active or inactive STATUS.

A green tick means that a user is active. If you want to deactivate a user, simply click the green tick and it will disappear.

A deactivated user:

• Cannot log in
• Will still appear on reports (however you can add information to identify them as deactivated on said report)

This is a good option for individuals who leave the business or are on long-term leave.

Note: If a user is deleted from the system, all historical training records will be lost. If you need to delete a user, please contact Thomson Reuters.
Course Management
In this section we will go over managing course details and properties.

Select **Course Management**.
You will see a list of courses available to you.

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
<th>Type</th>
<th>Enrolled</th>
<th>Published</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>00294_WC_...</td>
<td>Information Security (US)</td>
<td>E-Learning</td>
<td>8</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>00514_TR_...</td>
<td>Information Security and Cyber Risk Awareness (Global)</td>
<td>E-Learning</td>
<td>7</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>00192_TR_...</td>
<td>Anti-Money Laundering (AML) (Global)</td>
<td>E-Learning</td>
<td>0</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>00625_TR_...</td>
<td>Insurance Fraud (Global)</td>
<td>E-Learning</td>
<td>0</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>00402_TR_...</td>
<td>Personal Data Protection Act (Singapore)</td>
<td>E-Learning</td>
<td>10</td>
<td></td>
<td>English</td>
</tr>
</tbody>
</table>
Click the Categories icon to view the catalogue assigned to you.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Enrolled</th>
<th>Published</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Security (US)</td>
<td>E-Learning</td>
<td>8</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>Information Security and Cyber Risk Awareness (Global)</td>
<td>E-Learning</td>
<td>7</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>Anti-Money Laundering (AML) (Global)</td>
<td>E-Learning</td>
<td>0</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>Insurance Fraud (Global)</td>
<td>E-Learning</td>
<td>0</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>Personal Data Protection Act (Singapore)</td>
<td>E-Learning</td>
<td>19</td>
<td></td>
<td>English</td>
</tr>
</tbody>
</table>
Click the Filters icon to view courses filtered by Course Type, Status, Properties, Users in Waiting List, Enrolments and Languages.
Click the **Columns Management** icon to show or hide columns as per your need.
You can search a course by its Product ID or Course name.
There are various ways to enrol users to courses. Let's start by looking at the first option.

Click the ellipses (three dots) at the end of the row.

Click Enrol users. This option allows you to assign users to a specific course.
You can also choose to enrol users through these options:

- Click the **USERS** tab and simply select individuals.
- Click the **GROUPS** tab if you have those set up in the system.
- The most common way would be to assign via the **BRANCHES** tab.
In the **Branches** tab you will see the organization structure.

To select all, double-click the top level. You will see a tick, which would mean all the branches have been selected...
You can also select individual sub-groups if you wish.
You can also select individual users by clicking the **USERS** tab. Once you are happy with the selection Click **NEXT** to continue.
Finally, choose any deadlines that you wish to set. Then, click CONFIRM to enrol.
You will see the learners have successfully been enrolled to the course. To view these enrolments, click the highlighted icon.
You can search for assigned users via the Search bar.

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>FIRST NAME</th>
<th>L</th>
<th>Status</th>
<th>Enrolment Date</th>
<th>User Status</th>
<th>Course Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test244</td>
<td>Test3</td>
<td>242</td>
<td>Learner</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test245</td>
<td>Test4</td>
<td>242</td>
<td>Learner</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test253</td>
<td>Test12</td>
<td>242</td>
<td>Learner</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test258</td>
<td>Test17</td>
<td>242</td>
<td>Learner</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test259</td>
<td>Test18</td>
<td>242</td>
<td>Learner</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test200</td>
<td>Test19</td>
<td>242</td>
<td>Learner</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>
Anti-Money Laundering (AML) (Global)

Money laundering is a potential indicator of terrorist funding and other global crimes, making anti-money-laundering (AML) training even more necessary. Our courses intend to familiarise employees with the process of money laundering — the criminal business used to disguise...
Once you have found your user, you can edit details of the enrollment, if you like.

To do so, click the ellipses (three dots) and use the options available.
You can change the Enrollment Status to In Progress, Completed or Suspended.*

You can also set an Enrolment Deadline from the options available.

*Suspended users can access the platform, but they cannot access courses in which they have been suspended. A user is manually suspended in a course by the admin managing the course. They will not have access to training material or any course page for the courses in which they're suspended.
You can also select multiple users to change their enrolment status.
Once selected, you can use any of the actions. We have selected Unenrol for this demo. Select Unenrol.
Anti-Money Laundering (AML) (Global)
Money laundering is a potential indicator of terrorist funding and other global crimes, making anti-money-laundering (AML) training even more necessary. Our courses intend to familiarise employees with the process of money laundering — the criminal business used to disguise...

### Enrolments

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>LEVEL</th>
<th>ENROLMENT STATUS</th>
<th>ENROLMENT DATE</th>
<th>USER STATUS</th>
<th>COURSE COMPLETION D...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test244</td>
<td>Test3</td>
<td>242</td>
<td>Learner</td>
<td>Subscribed</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test245</td>
<td>Test4</td>
<td>242</td>
<td>Learner</td>
<td>Subscribed</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test253</td>
<td>Test12</td>
<td>242</td>
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<td>Subscribed</td>
<td>13/10/2020</td>
<td>Active</td>
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</tr>
<tr>
<td>Test258</td>
<td>Test17</td>
<td>242</td>
<td>Learner</td>
<td>Subscribed</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Test259</td>
<td>Test18</td>
<td>242</td>
<td>Learner</td>
<td>Subscribed</td>
<td>13/10/2020</td>
<td>Active</td>
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<tr>
<td>Test260</td>
<td>Test19</td>
<td>242</td>
<td>Learner</td>
<td>Subscribed</td>
<td>13/10/2020</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

The selected users will be unenrolled from the course.
You can also use other options to enrol learners to the course.

- Click **Managed Enrollments** icon.
You can enrol multiple users by:

- Using a Comma Separated Value file (CSV),
- Import enrolled users from another course
- Enrol individual users

Let’s enrol users from CSV.
When you select **Manage Enrolments from CSV** you will see the options as listed here. Select **Enrol users**.
A sample CSV file is shown here. It is editable in Excel and has two columns. First column is the username and second column is Level.

Note: Always keep the level as Learner.

<table>
<thead>
<tr>
<th>Username</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test242</td>
<td>Learner</td>
</tr>
<tr>
<td>Test243</td>
<td>Learner</td>
</tr>
<tr>
<td>Test244</td>
<td>Learner</td>
</tr>
<tr>
<td>Test245</td>
<td>Learner</td>
</tr>
<tr>
<td>Test246</td>
<td>Learner</td>
</tr>
<tr>
<td>Test247</td>
<td>Learner</td>
</tr>
<tr>
<td>Test248</td>
<td>Learner</td>
</tr>
<tr>
<td>Test249</td>
<td>Learner</td>
</tr>
<tr>
<td>Test250</td>
<td>Learner</td>
</tr>
<tr>
<td>Test251</td>
<td>Learner</td>
</tr>
<tr>
<td>Test252</td>
<td>Learner</td>
</tr>
<tr>
<td>Test253</td>
<td>Learner</td>
</tr>
<tr>
<td>Test254</td>
<td>Learner</td>
</tr>
<tr>
<td>Test255</td>
<td>Learner</td>
</tr>
<tr>
<td>Test256</td>
<td>Learner</td>
</tr>
<tr>
<td>Test257</td>
<td>Learner</td>
</tr>
<tr>
<td>Test258</td>
<td>Learner</td>
</tr>
<tr>
<td>Test259</td>
<td>Learner</td>
</tr>
<tr>
<td>Test260</td>
<td>Learner</td>
</tr>
</tbody>
</table>
Upload the CSV file by clicking the Green icon or simply drag the file to the area.
You can also review the **Advance Settings**.

When you’re ready, click **CONFIRM**.
The list of users have been assigned to the course.

You can check the background jobs to see if there are any errors.
You can obtain a report on an individual course using the **REPORTS** tab.

<table>
<thead>
<tr>
<th>LAST NAME</th>
<th>EMAIL</th>
<th>LEVEL</th>
<th>ACTIVE FROM</th>
<th>ACTIVE UNTIL</th>
<th>ENROLMENT STATUS</th>
<th>ENROLMENT DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
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<td></td>
<td></td>
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<td>242</td>
<td></td>
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<td></td>
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<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
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<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
<tr>
<td>242</td>
<td></td>
<td>Learner</td>
<td></td>
<td></td>
<td>Subscribed</td>
<td>22/10/2020</td>
</tr>
</tbody>
</table>
Click the course for which you want to generate the report.

Insurance Fraud (Global)
The top of this page displays the overall course statistics, and the bottom shows a list of individual users.
COURSE REPORTS (4)

You can download a course report in either Excel or CSV format.
Click DOWNLOAD to view your report.
A Sample Report is shown here.
Managing Reports
Note that Reports will soon be integrated with New Reports. If you would still like details on this section, please click Reports. The contents will open in a new window.

We encourage you to use the New Reports section. Details on this are available on the next page.
Managing New Reports
• In this section we will go over creating and managing reports.

• Select **New Reports**.
Let's review **QUICK SUMMARY REPORTS & DASHBOARDS**
Enter the name of the course you want to generate a Course summary report for and click GENERATE.
Welcome to the New Custom Reports functionality! You can now create, view, and manage your custom reports benefiting from the new experience and features available in the Custom Reports Builder tab.

You can print or download the report.

The top half of the page will show the course statistics...
Welcome to the New Custom Reports functionality! You can now create, view and manage your custom reports benefiting from the new experience and features available in the Custom Reports Builder tab.

...with a list of users at the bottom.
Now let's look at the Courses dashboard.
This Courses dashboard shows you high-level usage numbers. The Enrollments number can be very helpful to keep an eye on the credits you have used. You can also download this information as a PDF or CSV.
The bottom of the page lists the courses and their usage. If you want to look more closely at information for each course, click the course name.
By default, you will be presented with information for your entire company. However, if you want to see a breakdown of information per department, then click **Categories**.
Click the sub-group you wish to view data for, and the dashboard will get updated.
Now let's look at the Branches dashboard.
This gives you information about the branches you have in the system.

You can also download this information as a PDF or CSV.
At the bottom of the page is a list of branches and the respective usage.

<table>
<thead>
<tr>
<th>Sub-Branches</th>
<th>USERS</th>
<th>ENROLLED</th>
<th>COMPLETED</th>
<th>IN PROGRESS</th>
<th>NOT STARTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-TR Admin [DO NOT DELETE]</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Demo: Department 1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Demo: Department 2</td>
<td>2</td>
<td>4</td>
<td>3</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Demo: Department 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Demo: Department 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Users</td>
<td>16</td>
<td>29</td>
<td>17</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>Z:Leavers</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
You can change the display view to view information on each branch or view details of users within each branch.

- Select **USERS** from the dropdown list.
By default, the entire company's information will be listed. However, if you wanted to see a breakdown of users per department, then select **Categories**.
Click the sub-branch you wish to view, and the dashboard will get updated.
You can create custom reports by selecting CUSTOM REPORTS BUILDER.

No Custom Reports Found
Click the Add button in the top right corner to add a custom report
Click the Create Custom Report icon.
Select the report you want to create from the options available. For this Demo we will use the **Users - Courses** report. The benefit of this report is that you can include the user's branch.

This report will present a line item for each course and show you how many users in a specific branch or group are assigned to the course in question.

You can also create webinar session reports yourself.
CREATING A CUSTOM REPORT

Enter Name and Description of the report.

Select Create & Edit to begin.
The name, description and type will be populated in Report Info.

If you create a report this option is automatically checked. If you want to uncheck this option (allowing access to the report without logging in) please contact Thomson Reuters.
When creating your report you can set the time zone for how the data will display (i.e. time stamps for completion can be set to UK, EST, IST etc.) so that data displays more relevantly.

You can select which Power User will be able to edit and view the report.
CREATING A CUSTOM REPORT (7)

The selected Power User will appear here.
Select FILTERS for additional filtering options.

You can select All Users from your branch or...
CREATING A CUSTOM REPORT (9)

... create a custom selection by users, groups or branches.
You have the option to exclude deactivated users from your report. (NOTE: This is ONLY deactivated users, expired users will still appear on this report.)
You can also select all courses or make a custom selection of required Courses or Learning Plans.

To select the required courses, click **SELECT COURSES** and...
CREATING A CUSTOM REPORT

...then simply tick the checkbox of the courses you wish to report on.
You can also filter using Expiration Date and Enrolment Date.
You can further filter to include individuals on courses within a specific enrolment date range.

You can also report on only those who have completed by selecting the desired completion date.

The filters available are:

1. Is before “x” days ago or an absolute date
2. Is After “x” days or an absolute date
3. Is in the range between two dates
You can also report on only those who have completed by selecting the desired completion date in relative format.
Once you have selected the filters, click View Options to select User and Course fields you wish to report on.

- Select the desired information you wish to include on your report. By default, the username and course name will be included.
- Note the few items already selected that would be most useful.
You can order the data by all fields selected on your report (including additional fields).
You can order the columns of your data. You can decide which data appears in column A, which data appears in column B and so on.
Drag and drop the fields to re-order them to suit your purpose and then click CONFIRM.

Once you’re happy with the View Options, you can export the report or schedule it to run periodically.
Use the SCHEDULE tab if you want to schedule reports to be run periodically.
The scheduled report will be sent before 6 am on the chosen day.

There is flexibility on how you can schedule reports. For example, you can use the option to schedule a report every two weeks.

The From date is when the report will first be sent, it will then follow the “every...x...days/weeks/months” configuration.

You can have up to 25 recipients of the report.
You can preview the first 100 rows of the report. When you are happy to proceed, press **Save Changes**.

Select Export to export your report.
CREATING A CUSTOM REPORT (23)

Select the format you wish to export your report in.

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>FULLNAME</th>
<th>COURSE NAME</th>
<th>COMPLETION DATE</th>
<th>ENROLLMENT END DATE</th>
<th>ENROLLMENT STATUS</th>
<th>FINAL SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test242</td>
<td>Test242</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:11</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test243</td>
<td>Test242</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:12</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test244</td>
<td>Test242</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test245</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test246</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test248</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test249</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test250</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test251</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test252</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
<tr>
<td>Test254</td>
<td>Test424</td>
<td>Information Security and Cyber Risk Aw...</td>
<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
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</tr>
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<td>Test255</td>
<td>Test424</td>
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</tr>
<tr>
<td>Test256</td>
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<td>2020-10-30 23:50:59</td>
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</tr>
<tr>
<td>Test258</td>
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<td>2020-09-08 07:49:13</td>
<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>90.0</td>
</tr>
</tbody>
</table>
Please note that data in the report is not real time. System will indicate the date and time of last updated data.

Click EXPORT to export your report.
CREATING A CUSTOM REPORT (25)

The first 100 rows of the report are displayed in this preview.

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>FULLNAME</th>
<th>COURSE NAME</th>
<th>COMPLETION DATE</th>
<th>ENROLMENT END DATE</th>
<th>ENROLMENT STATUS</th>
<th>FINAL SCORE</th>
</tr>
</thead>
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<td>Test243</td>
<td>Test243</td>
<td>Information Security and Cyber Risk Awa...</td>
<td>2020-09-08 07:49:11</td>
<td>2020-10-30 23:50:59</td>
<td>Subscribed</td>
<td>0.0</td>
</tr>
<tr>
<td>Test244</td>
<td>Test244</td>
<td>Information Security and Cyber Risk Awa...</td>
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<td>Subscribed</td>
<td>0.0</td>
</tr>
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</tr>
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</tr>
<tr>
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</tr>
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<td>2020-10-30 23:50:59</td>
<td>Completed</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Your background job will be created.
You will be notified when the report is ready. Clicking the notification will provide you a link to download the report.
My Team Management
A manager can be given visibility of their direct reports to allow them to review how the team members are progressing on training and act accordingly.

When enabled, the **My Team** option is available on the left hand menu and **only visible to managers with direct reports**.

If someone is not a manager, this option will not appear.
The TEAM MEMBERS page acts as a dashboard where the manager can see the status of their team’s training.

Managers will be able to see their direct reports and drill down into their team member’s reports, for instance, to see if anyone has overdue courses.

NOTE: This is standard functionality and cannot be changed.
The Summary allows managers to quickly see how many team members have overdue courses or expired certifications.
A card will appear green as long as the user has no overdue courses. The user could have 10 incomplete courses, but if the deadline has not passed, it will display as green.

A card will appear orange if the user has one or more overdue courses.

Note: A user must be active in order for a user card to appear.
Each user’s card offers further options by clicking the ellipses (3 dots) on the top right of the card.

**Send Email:** Opens a panel to email this individual. There is no option to select multiple people and send mass email.

**User Summary Report:** Brings up the user summary.

**Overdue courses:** This will jump directly to the “Courses” page of the user personal summary.
To give Manager's permission via the CLMS interface, Select the user/s and click CHOOSE ACTION followed by Give Manager Permissions.
Toggle on **This user manages a team** button to give manager permissions.

Start selecting this user’s direct reports.
To add managers to the system or update existing accounts to enable this feature, a .csv file needs to be created with the following data:

- **Column A**: Username of users
- **Column B**: Managers identified by entering “1” (the system will also accept Yes)
- **Column C**: Username of the individual's direct manager

### Example CSV File

<table>
<thead>
<tr>
<th>Username</th>
<th>Is a manager</th>
<th>Direct Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>User <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:3@yourcompany.com">3@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:4@yourcompany.com">4@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:5@yourcompany.com">5@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:3@yourcompany.com">3@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:6@yourcompany.com">6@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:3@yourcompany.com">3@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:7@yourcompany.com">7@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:8@yourcompany.com">8@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:9@yourcompany.com">9@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:10@yourcompany.com">10@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
</tr>
<tr>
<td>Manager <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
<td>1</td>
<td>Manager <a href="mailto:1@yourcompany.com">1@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:12@yourcompany.com">12@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:3@yourcompany.com">3@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:13@yourcompany.com">13@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:3@yourcompany.com">3@yourcompany.com</a></td>
</tr>
<tr>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
<td>1</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:15@yourcompany.com">15@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>User <a href="mailto:16@yourcompany.com">16@yourcompany.com</a></td>
<td>0</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
<tr>
<td>Manager <a href="mailto:3@yourcompany.com">3@yourcompany.com</a></td>
<td>1</td>
<td>Manager <a href="mailto:2@yourcompany.com">2@yourcompany.com</a></td>
</tr>
</tbody>
</table>
Select Update information for existing users.

These are the two fields you will be updating:
- Is a manager = 1 (column B)
- Direct manager = username of their manager (column C)
To download a report on the current manager-direct reports relationship:

- Select All users
- Click CHOOSE ACTION
- Export
- Export as CSV or XLS
Select the fields you would like to include in the report. Ensure you include the fields:

- Username,
- Manager Permissions, and
- Direct Manager.
The system will generate a report, with manager-direct reports relationship. The direct managers will be indicated with a **Yes** as their field value.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>username</td>
<td>manager</td>
<td>Direct Manager</td>
</tr>
<tr>
<td>2 Test255</td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>3 Test256</td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>4 Test257</td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>5 Test258</td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>6 Test259</td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>7 Test260</td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>8 <a href="mailto:demo_power@tradmin.com">demo_power@tradmin.com</a></td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>9 <a href="mailto:demo_power1@tradmin.com">demo_power1@tradmin.com</a></td>
<td>No</td>
<td>test_manager</td>
</tr>
<tr>
<td>10 test007</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>11 test_manager</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>
Managing Notifications
In this section, we will look at the notifications feature.
- Select **Manage** under **NOTIFICATIONS**.
You will see a list of notifications available to you.

When are assignment emails sent?
The assignment notification email is sent when a user is enrolled to a course. By default, it will be scheduled to go out Hourly.

What does this schedule mean?
The assignment email will be sent at the top of the hour. If you assign a user at 10:08 am, the assignment email will be sent at 11 am.

When are reminder notifications sent?
The example here shows that notifications will be sent 7 days and 1 day prior to the course deadline. The time is currently set at 9 am. Please note that the default mail server time is GMT so these will be sent at 9 am GMT.

How can I change this schedule?
Simply click the link in the SCHEDULED column and change as necessary.

On clicking a scheduled link:

Edit Notification

Schedule Notification

- Before the event
- After the event
The **FILTER** displays who will receive these emails. By default your entire org structure – and so all users – are selected.

If you wish to amend this simply click the **FILTER** link for the specific notification. This will bring up the pop-up. If the parents level (in this instance “00. [Demo] Compliance Learning LMS”) shows a tick beside it, all children branches will be selected.

If you wish to deselect any child branch you must first double click the parent group (this will deselect all children) and then manually select the children you wish to be sent these notifications.

Toggle through the steps by clicking the **NEXT** button until you reach the last page where you are prompted to save.
The **ASSOCIATED COURSES** displays the courses that are associated to these emails. On your initial set-up, unless requested otherwise, all courses available to you are added. If you didn’t want people taking the AML course to be sent a reminder then you could remove that course and so on.

Note: If/when you request Thomson Reuters to add more courses to your account our operations team will do so. However, it will be your responsibility to review your notifications and the associated courses to ensure these new courses are added.

To add new courses, simply click the highlighted icon in the **ASSOCIATED COURSES** column and then on the **Assign Courses** button (highlighted below).
The green tick shows that the notification is active (i.e., if you assign anyone to any course, they will receive the assignment email and the reminders when specified).

To deactivate a notification simply click the green tick and it will turn grey indicating that it is no longer active.

Note: If/when you activate a notification that was deactivated the email will not be triggered (i.e., it is not automatically sent), you are simply telling them system that this notification is now switched on so please send it when the relevant event occurs (e.g., a course is assigned, or a reminder date has arrived).
Click the Pencil icon to edit the existing email.

Once the popup window opens click Email and then select the relevant language from the dropdown. Users with this language associated to their account will be sent the email as specified by you.

Toggle through the steps by clicking the NEXT button until you reach the last page where you are prompted to save.
When are assignment emails sent?
The assignment notification email is sent when a user is enrolled to a course. By default it will be scheduled to go out Hourly.

What does this schedule mean?
The assignment email will be sent at the top of the hour. If you assign a user at 10:08 am, the assignment email will be sent at 11 am.

How do I check my notifications?
1) Click NOTIFICATIONS > Manage
2) Pay attention to the EVENT. Digest: user enrolled to a course is your assignment email.
3) If everything looks correct then return to your Admin Menu and select Courses.
When the assignment email is sent it will be populated with all of the courses that the user was enrolled in. The assignment email may list one course or multiple courses.

**Things to consider**

1) What is your main priority for “resending” the assignment email? Is it to:
   a) Grant the user access to the system
   b) Perfectly match what was initially sent

There is no feature to resend what was initially sent to the user, so what we are going to do is reassign them. By doing so we once again trigger the sending of the assignment email to the user.

**Why did we raise points a and b?**
If you just want to ensure that they can log into the system, then simply un-assign and re-assign one course. Once logging in they will see all courses on their training portal.

If you want to match the initial email (and the user was assigned to multiple courses) then you will have to un-assign and re-assign the user to **ALL** courses.
1) Click the course that you wish to initially un-assign by selecting the people icon.

2) Use the Search bar to find the relevant user.
3) Take note of the Active from and Active until fields. We are going to match these when we re-assign.

5) Click ‘x’.

6) Check “Yes I want to proceed!” and then click CONFIRM.
5) Click **Unenroll**

6) Click **UNENROLL** from the prompt again to remove the user from the course.
The user has now been un-assigned from the course. Our next step is to re-assign them to the course, and match the original **Active from** and **Active until** dates.

1) Click **Enrol users**.

2) Select the user you wish to assign and then click **NEXT**.

**Note:** This page will only show you users not currently assigned to the course. If there is a long list of users then use the Search function.
The user has now been un-assigned from the course. Our next step is to re-assign them to the course, and match the original **Active from** and **Active until** dates.

3) From the dropdown select **Learner**
4) Check **Set enrolment deadlines** and match the **Active from** and **Active until** dates of the initial assignment, and then click **CONFIRM**.

You will receive a confirmation of user enrolment at the bottom of screen.

**Remember:** The assignment email will be sent at the top of the hour. Let’s say you assign a user at 10:08 am, the assignment email will be sent at 11 am.
Managing the Newsletter
In this section we will go over the newsletter.

Select Newsletter.
• The newsletter feature allows you to target users in the system and contact them by email, notification or both.

• If you choose notification, the message will appear in the user’s notification section (highlighted bell icon at the top of the page).

• To select the users, click ADD.
Much like assigning courses or building reports, you can choose to send the newsletter to Users or Branch.
PLEASE NOTE: When using this feature, you have the ability to edit the From email address. This is essentially known as “spoofing” the email address and could result in your mail servers blocking emails as they may deem it as a security risk.

It’s best practice to conduct testing on this feature to see if the emails are successfully delivered. If they’re not, then try and use the no-reply-recordkeeper@thomsonreuters.com address and see if the problem is resolved.

Populate your message, upload a file if necessary and then click SEND.
Managing Certificates
• In this section we will look at downloading certificates of completion.
• Select **Certificate Template**.
Each training course is assigned a certificate. These certificates are language specific.

All English language courses have the same English certificate attached, whereas all French courses have a French certificate attached.

If you have enrolled to courses in various languages, you will see multiple certificates in this view.

Click the **Issued Certificates** icon.
Select a course that you wish to download certificates for.

If you have multiple English language courses, they will all appear in this dropdown list.
The system will list all users who have obtained a certificate for the selected course. You can search for specific users using the Search bar (search by username) and download their certificate of completion in PDF format by clicking the certificate icon.

Please note: Certificates cannot be downloaded in bulk and would have to be downloaded for each user.

Users can obtain their own certificates via their profile.
Managing External Training Records
• In this section, we will look at adding external training records.
• Select Manage under EXTERNAL TRAINING.
To add a single external training record to a single user, click the Report New Training Activity button.
The record can only be assigned to an existing user on the platform. Their username should be entered here.

Fill in the form with the relevant information and then click CONFIRM to save.
The newly created record will now be listed.

You can edit or delete the record using the highlighted icons.
You can also add records via CSV. This is a quick and easy way to add records in bulk. Click the **Import via CSV** button.
You can download a sample file.

Upload your CSV file and change the parameters as required. It is recommended that you do not change the default parameters.

An example of a populated CSV file is shown. When you’re happy to proceed, click NEXT.
Use the dropdown lists to populate each field with the relevant data.

If you do not wish to import data, you can choose Do not import from the dropdown.

When you’re happy to proceed click NEXT. Your platform will refresh, and the data will be processed.
### External Training

**Report New Training Activity**

**Import CSV**

<table>
<thead>
<tr>
<th>USER</th>
<th>COURSE NAME</th>
<th>TYPE</th>
<th>DATE</th>
<th>SCORE</th>
<th>CREDITS (CRUS)</th>
<th>TRAINING INSTITUTE</th>
<th>CERTIFICATION</th>
<th>CERTIFICATE</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:Chris.Green@email.com">Chris.Green@email.com</a></td>
<td>Health and Safety</td>
<td>Classroom</td>
<td>18/1/2019 / 15/1/2019</td>
<td>100/100</td>
<td></td>
<td>Thomson Reuters Induction</td>
<td></td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Amy.Kerry@email.com">Amy.Kerry@email.com</a></td>
<td>Health and Safety</td>
<td>Classroom</td>
<td>18/1/2019 / 15/1/2019</td>
<td>100/100</td>
<td></td>
<td>Thomson Reuters Induction</td>
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<td></td>
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<tr>
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<td>Health and Safety</td>
<td>Classroom</td>
<td>14/1/2019 / 15/1/2019</td>
<td>100/100</td>
<td></td>
<td>Thomson Reuters</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 3

The newly created records will now be listed.
Earlier in this guide we looked at how to create your own custom report.

To download external training records we follow the same steps of navigating to the reports section and clicking the Create Custom Report button.

On the first page you will name your report but importantly you change the type of report from Users – Courses to Users – External Training.

Click NEXT and follow the steps to build and save your report.
Other Features
LEARNING PLANS AND BACKGROUND JOBS

Learning Plans
This option allows you to package several courses together and assign them in one go.

You can add prerequisites, so these courses must be taken in a specific order. If you have more questions about this feature and how it could benefit you, please contact Thomson Reuters.

Background Jobs
This option displays a list of jobs running in the background.

An example would be a large import of users that may take a few minutes.
Administrator Guide

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