

Thank you for choosing the CentreLearn Training System.

GETTING STARTED IMPLEMENTATION GUIDE

Our Getting Started Implementation Guide is meant to provide guidance on how to implement the CentreLearn Training System for your organization.

This guide is meant to support your planning and speed-up your implementation by giving you a place to document your decisions. Review of this guide will also help you prepare for our phone meeting.

Let's get started!



Training just got easier™

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Step 1: Prepare

Identify Credentials to be Tracked

Credentials are used to track licenses, certifications, IDs, or other user information that is not part of the standard profile. You can require that users in a group have specific credentials, and report on upcoming expirations. You can configure automatic credential expiration warning email notifications that copy training managers, and set if users can manage their own credentials. The CentreLearn Training System has common across organization built-in credentials. Some common examples of custom credentials are user driver's licenses, employee ID numbers, and Emergency Medical Dispatch. Please see [Appendix A: Organizational Credentials Planning Worksheet](#) for a planning chart that you can fill out and reference when setting up your organization.

Identify Additional Categories (Classifications) for Courses as Required for Credentials

Categories are shared with your organization. All CentreLearn courses are tagged with appropriate categories, and which collections we share with you determines which categories are printed on course completion certificates. CentreLearn has categories for NREMT, NFPA, CCEMT-P, ISO, FP-C, and some individual states. You also can build custom categories.

Categories are tags on courses often used in assigning or tracking requirements. You can assign a number of hours in a specific category to be completed by a certain date. Beyond the ones shared to you by CentreLearn, you can create your own custom categories for your custom courses and activities. Please see [Appendix B: Organizational Categories Planning Worksheet](#) for a planning chart that you can fill out and reference when setting up your organization.

Determine Your Groups of Personnel

Groups are used to organize your users. You can require that users of a group have specific credentials, and are assigned specific courses. You can distribute a group's invitation link to add users quickly to your system, set required credentials, and manage course assignments. Many organizations have groups for shifts, stations, credentials, and specific groups of individuals - such as "New Hires". Groups can also have required credentials that the user must enter prior to being able to complete any course. Required credentials for group membership might include state certification license (i.e. New York EMT-P), NREMT level, CPR, or even required custom credentials like a driver's license number for the Drivers group. Please see [Appendix C: Organizational Groups Planning Worksheet](#) for a planning chart that you can fill out and reference when setting up your organization.

Determine the Method(s) to Make Courses Available

There is a variety of methods to give personnel access to courses. One or more may be utilized in your implementation. Consider these questions when deciding how to grant access to or assign courses. How do you want courses to be made available to your personnel? What is it that your members need to do every month, year, or certification cycle?

Training Plans

Training Plans are how you require users with a specific credential to complete recurring assignments. Personnel with that credential automatically have course and/or category hour requirements assigned to them. Due dates are automatically set to each user's credential expiration. Courses/activities that meet the training plan assignments that are completed between the issue and expiration date may apply towards the training plan. After their credential issue and expiration dates are updated, and their records archived, users can retake all applicable courses. Courses are assigned to a training plan's assignments alphabetically and by the date completed. Please see [Appendix D: Training Plans Worksheet](#) for a planning chart that you can fill out and reference when setting up your organization.

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Assignments

One-time, or standalone, assignments are how you task, or make available, courses to users or groups. You can require completion of specific courses or credit hours in a category, and/or simply make available entire catalogs of courses. Documents can also be assigned. Please see Appendices E-H in the Appendix for planning worksheets that you can fill out and reference when setting up your organization.

Assign Specific Course

Assign specific courses to be completed by a certain date. ([Appendix E – Assign Specific Course Planning Worksheet](#))

Assign Credit Hours

Assign specific hours of training in a category to be completed by a certain date. ([Appendix F – Assign Credit Hours Planning Worksheet](#))

Make Catalog Available

This makes courses available to personnel to complete as needed and with no specific due date. ([Appendix G – Make Catalog Available Planning Worksheet](#))

Assign Document

Require that your personnel read a document you have uploaded to the Document Manager ([Appendix H – Document Manager Planning Worksheet](#)), and attest that they have read it. ([Appendix J – Assign Document Planning Worksheet](#))

Decide How You Want to Add Users

Determine how you want to get personnel into the system and how you want to notify them that the CentreLearn Training System is now available. Several methods are available. Identify each method that you will want to do. If you choose to use **Utilities** to create accounts or **New Account Notifications** are disabled in **Settings**, you will also need to notify them that an account has been created for them. How to enter and set up your personnel is explained in more detail in [Step 3: Release Plan](#).

How Do You Want To Enter Personnel?

1. Import through **Utilities**
 - a. Data must be entered on an excel spreadsheet then imported.
2. Manually add personnel
3. Get personnel to self-create their accounts using **Group Invitations**
 - a. Send invitations through the CentreLearn Training System or your email
 - b. Accounts are created by users.
 - c. Invitations automatically enroll personnel in the group selected.
 - d. Personnel must enter all required credentials for the group.

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How Do You Want To Place Users Into Groups?

1. Import through **Utilities**
 - a. Data must be entered on an excel spreadsheet then imported.
2. Manually add personnel
3. Get personnel to self-enroll in their groups using **Group Invitations**
 - a. Send invitations through the CentreLearn Training System or your email system.
 - b. Users are prompted to create an account or login. They are automatically enrolled in the group once they login or create their account.

Step 2: Setup

Set up Organizational Properties

Log into the CentreLearn Training System with your email (username) and password at the website <https://login.centrelearnsolutions.com/> to begin your site setup and then go to the **Settings** tab.

Settings – General – Site Settings

1. **Organization Name** – This is displayed on the top right underneath an individual's name.
2. **Header Text** – This is displayed on the top left next to your logo and can be styled with HTML. Some organizations have their name here, others a motto statement.
3. **State/Province/Region** – Your organization's location
4. **Logout URL** – Where users are sent to once they logout
5. **Default Time Zone** – This is the default time zone for all your users. They can override this individually from their profile.
6. **Video Libraries** – Videos belonging to these libraries will be available by going to **Training Manager**, accessing **Activities** from the left menu, then clicking **+View On Scene Video**.
7. **Self-submitted Records** – Enable or disable if personnel can submit their own activity completion records in the RECORDS tab for approval by administrators and those with the **Manage Activities** role.

Settings – General – Accounts

1. **New Account Notification Emails** – Enable or disable automatic emails to users when an account has been created.
2. **New Account Notification Users** – These users will be copied on new account creation emails.
3. **Automatic Account Inactivations** – Enable or disable automatic account inactivations based on login inactivity.
4. **Account Inactivation Notification Users** – These users will be copied when a user is automatically inactivated.
5. **Inactivity Threshold** – Set the number of months of inactivity before a user will be automatically inactivated.
6. **Batch Utility Account Identifier** – Used in batch utilities to identify each user. If a credential is selected, the associated number will be used to identify the user.

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Settings – General – Credentials

1. **Credential Notification Emails** – Enable or disable weekly credential expiration warning emails.
2. **Credential Notification Users** – These users will be copied on credential expiration warning emails.
3. **Expiration Threshold** – The number of months before a credential expires to start generating weekly warning emails.
4. **Users Can Manage Credentials** – Enable or disable users ability to create/manage their own credentials from their profile.

Settings – General – Course Completions

1. **Course Completion Emails** – Enable or disable automatic emails to your users upon completion of each course.
2. **Course Completion Email Users** – These users will be copied on all course completion emails.

Settings – Logo

You can upload your logo to be displayed at the top left of the page to all of your users. Logos should have a white or transparent background, 72dpi and no more than 50px tall. Please [contact us](#) if you need assistance resizing the image.

Settings – Colors

You can select a color scheme for your organization; all of your users will see this color theme when they login.

Settings – News Feeds

Choose which news feeds to display up-to-the-minute industry news to your personnel on their Home page.

Setting Up Custom Credentials, Groups, and Categories

Credentials

1. Under the **Training Manager** tab, access **Credentials** from the left menu.
2. Click on **+New Credential**.
 - a. Enter the credential from [Appendix A – Organizational Credentials Planning Worksheet](#).
3. Repeat until all organizational credentials are set up.

Categories

1. Under the **Training Manager** tab, access **Categories** from the left menu.
2. For any unshared categories not listed in **Shared to you from CentreLearn**, click on **+New Category**.
 - a. Enter the categories from [Appendix B – Organizational Categories Planning Worksheet](#).
3. Repeat until all organizational categories are set up.

Groups

1. Under the **Training Manager** tab, access **Groups** from the left menu.
2. Click on **+New Group**.
 - a. Enter the group names from [Appendix C – Organizational Groups Planning Worksheet](#).
 - b. To add any required credentials to a created group:
 - i. Click **Edit**, then click on **+Add Required Credential**.
3. Repeat until all organizational groups are set up.

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Training Plans, Assignments, and Documents

See the following directions on how to add each assignment type and preview/locate courses. For detailed directions, please see our Administrator Support page.

Training Plans

1. Under the **Training Manager** tab, access **Training Plans** from the left menu.
2. Click on **+Create Training Plan**.
 - a. Enter the credential and warning threshold information from [Appendix D - Training Plans Worksheet](#).
 - b. Click on the **+Assign** buttons to enter the assignments, still using [Appendix D – Training Plans Worksheet](#). Click **Save Changes**.
3. Repeat until all training plans are set up.

Assign Specific Course

1. Under the **Training Manager** tab, access **Assignments** from the left menu.
2. Click on **+Assign Specific Course**.
 - a. Enter the course assignments from [Appendix E - Assign Specific Course Planning Worksheet](#).
3. Repeat until all course objectives are set up.

Assign Credit Hours

1. Under the **Training Manager** tab, access **Assignments** from the left menu.
2. Click on **+Assign Credit Hours**.
 - a. Enter the hour assignments from [Appendix F - Assign Credit Hours Planning Worksheet](#).
3. Repeat until all hour objectives are set up.

Make Catalog Available

1. Under the **Training Manager** tab, access **Assignments** from the left menu.
2. Click on **+Make Catalog Available**.
 - a. Enter the hour assignments from [Appendix G - Make Catalog Available Planning Worksheet](#).
3. Repeat until all self-enroll objectives are set up.

Set Up and Share Documents

1. Under the **Training Manager** tab, access **Documents**. Utilize [Appendix H – Document Manager Planning Worksheet](#).
2. Click on **+New Folder**, enter the **Title** and selected **Share to Groups**, and then click **Save Changes**.
3. Click **Files** next to the folder where you would like to add files.
4. Click **+New File**, add a **Title**, choose file, and then click **Submit**.
5. Repeat until all folders and files are added.

Make Document Assignments

1. Under the **Training Manager** tab, access **Assignments**.
2. Click on **+Assign Document**.
 - a. Enter the document assignment from [Appendix J – Assign Document Planning Worksheet](#).
3. Repeat until all document objectives are set up.

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Reviewing Catalogs and Previewing Courses

Review what courses are in a catalog

1. Under the **Training Manager** tab, access **Catalogs** from the left menu.
2. Click **Review** to place the catalog on your **Home** page.

Locate and preview courses

1. Under the **Training Manager** tab, access **Preview Courses** from the left menu.
2. Using the **Search** area, type a topic or category that you are looking for in a course
 - a. The search function searches for your term in the course code, name, description, and course categories.
3. Under the **Training Manager** and **Preview Courses**, you can also browse courses by categories by clicking the **Browse by Category** tab.

Step 3: Release Plan

Getting your personnel in the system and releasing your CentreLearn Training System organization to your personnel. Remember, if you choose to use **Utilities** to create accounts or **New Account Notifications** are disabled in **Settings**, you will also need to notify your users that an account has been created for them.

Entering Personnel

Any or all of the methods listed below may be used to enter personnel into the system.

Import through **Utilities**

1. Under the **Training Manager** tab, access **Utilities** from the left menu.
2. Click on **Import** next to **Import Users**.
3. Download and fill in your spreadsheet and select the saved import filled-in file. Select **Import File**.
4. You will get an email with the results of your import once it is complete.

Manually Add Personnel

1. Under the **Training Manager** tab, access **Personnel** from the left menu.
2. Click on **+New User**.
3. Enter the information for the new user, and then select **Save Changes**.
4. Repeat for each user.

Ask Personnel to self-create their accounts using **Group Invitations**

1. Under the **Training Manager** tab, access **Groups** from the left menu.
2. Click **Edit** next to the desired group.
3. Choose one option:
 - a. Copy-Paste your desired personnel's email addresses for that group into the **Email Invite** area and click **Invite**.
 - b. Copy the information from the **Invite Link** and use your email system to send the link to personnel.
A Sample email is in [Appendix K – Create an Account/Join a Group Sample Email](#).
4. Repeat for each group.

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Putting Personnel in Groups

Any or all of the methods listed below can be used to enter personnel into groups.

Import through *Utilities*

1. Under the **Training Manager** tab, access **Utilities** from the left menu.
2. Click on **Import** next to **Import Groups**.
3. Download and fill in your spreadsheet and select the saved import filled-in file. Select **Import File**. You will get an email with the results of your import once it is complete.

Manually add Personnel

1. Under the **Training Manager** tab, access **Groups** from the left menu, and click **Edit** next to the desired group.
2. Click in **Add Users** area to type and select all the personnel to add to the group.
3. Click **Save Changes**.
4. Repeat for each group.

Ask Personnel to self-enroll in their groups using *Group Invitations*

(Not necessary if **Personnel** created their own account using **Group Invitations**)

1. Under the **Training Manager** tab, access **Groups** from the left menu.
2. Click **Edit** next to the desired group.
3. Choose one option:
 - a. Copy the information from the **Invite Link** and use your email system to send the link to personnel. A Sample email is in [Appendix K – Create an Account/Join a Group Sample Email](#).
 - b. Copy-Paste your desired personnel for that group into the **Email Invite** area and click **Invite**.
4. Repeat for each group.

Notifying Personnel

If you imported or manually added personnel while **new account notifications** were disabled, you will need to notify them. Use a mail merge and your email to direct your personnel to <https://login.centrelearnsolutions.com/> and let them know their username and password. A sample email is in [Appendix L – Notifying Personnel Sample Email](#). Please contact us if you need assistance.

Assigning Roles

1. Under the **Training Manager** tab, access **Personnel** from the left menu.
2. Click **Edit** next to the user who is another administrator or who will need additional permissions.
 - a. Put a checkmark in each **Role** you are granting to that user. If they are an administrator, you only need to check the **Administrator** role.

Administrator - Has access to all Organization settings and functions, including all permissions below.

Manage Activities – Has access to **Training Manager – Activities** (can add for all personnel Record Other Training, On Scene Video Library, Watch Course as a Group) and **Pending Records** (can approve/deny records added by users).

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Manage Announcements – Has access to *Training Manager – Announcements*. Those with this role can set up/inactivate announcements to all personnel or to individual groups.

Manage Assignments – Has access to *Training Manager – Assignments, Training Plans, and Preview Courses*. Those with this role can setup/inactivate assignments or training plans for all personnel. Cannot add documents, but can assign them.

Manage Courses – Has access to *Training Manager – Course Builder*. Those with this role can build, edit, and activate/inactivate custom courses.

Manage Groups – Has access to *Training Manager – Groups*. Those with this role can create new groups, activate/inactivate groups, set required group credentials, send out group invites, add/remove people from groups, and archive group registrations.

Manage Site Settings – Has access to *Settings*. Those with this role can make changes to all organization general settings, logo changes, color scheme changes, and news feeds access.

Manage Users – Has access to *Training Manager – Personnel*. Those with this role can add new users, edit accounts, inactivate users, make changes to credentials, view certificates and current (incomplete assignments), reset attempts, view quiz results, and view account history. Those with this role can also archive individual registrations.

Run Reports – Has access to *Training Manager – Reports*. Those with this role can also schedule reports.

Send Batch Email – Has access to *Training Manager – Emails*. Those with this role can send emails to all groups and view previously sent emails.

View Activity History – Has access to *Training Manager – History*. Those with this role can see administrative actions tracked within your CentreLearn organization.

Manage Documents – Has access to *Training Manager – Documents*. Can create, delete, activate/inactivate, and update folders and files. Those with this role can also share folders with groups.

Manager of Group – This option is between a user's groups and roles. This feature has been created to grant a person the ability to address the day-to-day personnel issues for a discreet group of users; while not allowing them the ability to effect users that they have no authority over. Some key points to this are:

- Individuals can manage multiple groups as well as have assigned roles
- Cannot manage personnel with the Administrator role, even when they are in a managed group
- Can create and manage assignments, activities, run reports, send emails, and post group announcements
- Cannot create users, groups, training plans, documents, or assign other group managers
- Cannot archive courses

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Optional: Announcements

Announcements are a way to post messages to groups or users and are displayed on the **Home** tab in the upper right corner. You can report on who has, or has not, viewed any announcement.

1. Under the **Training Manager** tab, access **Announcements** from the left menu.
2. Click on **+New Announcement**.
 - a. Enter the **Title** and **Description** of your announcement and assign it to **Groups**. Click **Save Changes**.

Step 4: Adoption and Integration with Your In House Training

Make sure everyone has an account and is in the right group(s).

Verify User Accounts and Group Membership

1. Under the **Training Manager** tab, access **Reports** from the left menu.
2. Click on **Report** next to **Personnel**, select the group you are checking the membership.
3. Click **View Report**, and then **Export by Email**.
4. Compare the report to your records on who should be there.
5. Repeat for each group.

Check Who Has Logged In

1. Under the **Training Manager** tab, access **Reports** from the left menu.
2. Click on **Report** next to **Last Login Summary**.
3. Click **View Report**, and then **Export by Email**.
4. Check to see who has logged in.

Add Custom Courses to Your Organization

1. Under the **Training Manager** tab, access **Course Builder** from the left menu.
2. Click on **+New Course**
3. Enter a **title**, **description**, **course code**, and how many credits the course is worth. Optionally, add any applicable categories to the course. If this course is going to have classroom sessions that your personnel will need to register for to take this course, check the Classroom Course checkbox. This course will not be able to be taken/assigned successfully until a classroom session is setup. This cannot be undone.
4. Click **Next Step**.
5. Click the orange **Add Course Component** button to add the various components of the course.
 - a. You can click and drag the added components to arrange them as you see fit.
 - b. For additional support on adding specific content types and for setting up **Classroom Sessions**, please see our [Administrator Support](#) area or [Contact Us](#).
6. From this course screen, you may also set any other organizations that may view this course.
 - a. If you want to share a course with a particular organization, but they are not listed, you should contact your customer support contact for assistance.
7. Once you are finished, click **Save and Exit** or **Save Course**.

Personnel Created Records and Approvals

With the CentreLearn Training System, your personnel can submit activity records, like attendance at conferences, live burns, simulations, and seminars for your approval. Once approved, these **Pending Records** become permanent records and count towards **Assignments** and **Training Plans**.

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Personnel Directions for Submitting a Request

1. Under the **Records** tab, click the blue **+Add New Record** button.
2. Fill out the fields (title, description, date completed, and hours). Optionally, they can add categories and attach documents.
3. Click **Save Changes**.
4. Users are able to **Edit Submission** or **Delete Submission** from their **Records** tab.

Administrator/Training Officer Directions for Responding to a Pending Record Request

1. Under the **Training Manager** tab, access **Pending Records** from the left menu.
 - a. When there are **pending records** waiting for approval, a notice will appear in red in the **Training Manager**.
2. Click **View** next to the **pending record**.
3. Review and update, as needed, the record.
4. Once complete, click **Save and Approve** or **Deny**.
 - a. If you choose **Save and Approve** and **Course Completion Notifications** in **Settings** are enabled, the user will receive a notification of the new record added to their account.
 - b. If you choose **Deny**, the user will receive notification that their pending record request was denied, even when notifications are disabled.

Adding Instructor-Led Activities

Instructor-led activities let you track completion of hands-on training or classroom instruction, online courses watched together as a group, or videos viewed as a group from our library of expertly selected best-of-the-web content.

Record Other Training

Record completion of any hands-on training, classroom instruction, drills, simulations, or live burns. Also, use this to record events attended outside of your organization, like seminars or conference presentations.

1. Under the **Training Manager** tab, access **Activities** from the left menu.
2. Click **+Record Other Training**.
3. In the fields, enter a title, description, date, hours, and who attended. Optionally add any categories. Click **Save Changes**.

View on Scene Video

Watch a video with your group from “On Scene”, our expertly selected best-of-the-web library of videos. Try our suggestions for follow-up discussions and drills or use your own, then record the activity for your reports.

1. Under the **Training Manager** tab, access **Activities** from the left menu.
2. Click **+View On Scene Video**.
3. Watch the video, optionally follow our training suggestions, then in the fields, enter the date, hours, and who attended. You can optionally edit the other required fields. Click **Save Changes**.

Watch Course as a Group

Watch an online course in a group together. After watching the videos, each group member can log in to finish the other course components, like a quiz, before earning the completion certificate.

1. Under the **Training Manager** tab, access **Activities** from the left menu.
2. Click **+Watch Course as a Group**.

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3. Search for your desired course and click **View** next to the course name and rating.
4. Click **Play Course** and go through each of the available course components.
5. Once you get to **Participation**, add those that attended in the **Users** field, as well as the date and time. Click **Add Participants**.

Step 5: Learning More

Resources for Administrators and Training Officers

- Subscribe to our [YouTube channel](#) that has how-to videos of common administrator tasks
- Find systematic instructions and videos for common administrator tasks in our [CentreLearn Administrator Support](#) area.

Resources for Users

- Watch our New User Orientation video <https://www.youtube.com/watch?v=WyhLKAXL2Hs>.
- Find systematic instructions and videos in our [CentreLearn Personnel Support](#) area.
- Subscribe to our [YouTube channel](#) that has how-to videos for completing courses and assignments, updating your profile, and accessing training records

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Planning Worksheet Appendices

Appendix A – Organizational Credentials Planning Worksheet

The CentreLearn Training System has ACLS, CCCEMT-P, CPR, EMS State Certification/License, NREMT, PALS, PHTLS, and State Fire Service. In the chart below, list the additional credentials you may need.

Credential Name					
Issued by State	Y/N	Y/N	Y/N	Y/N	Y/N
Expiration Date	Y/N	Y/N	Y/N	Y/N	Y/N
Has a Number	Y/N	Y/N	Y/N	Y/N	Y/N
Display on Certificate	Y/N	Y/N	Y/N	Y/N	Y/N
Display in Training Plans	Y/N	Y/N	Y/N	Y/N	Y/N
Available Levels					

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Appendix B – Organizational Categories Planning Worksheet

For your organizational credentials: list the Credential, Level, and applicable CE Categories are needed, please note, shared categories are available as well.

Credential	Level	What Categories for CE

Appendix C – Organizational Groups Planning Worksheet

Are there groups you would like to create to organize personnel for reporting and course? Use the chart below to outline your groups.

Group Name	Required Credentials (optional)

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Appendix D – Training Plans Worksheet

Training Plans are how you require that users with a specific credential complete recurring assignments. Users with the credential set below automatically have the assignments set below to them. Due dates are automatically set to each user's credential expiration. Make additional copies as needed. Click [here](#) for directions.

Title of Training Plan			
Warning Threshold (months to warn user completion is in danger)		Attached to credential: Type, State, Level	
Assign Specific Course Assignment			
Title of Course Assignment		Course(s)	
Assign Credit Hours Assignment			
Title of Hours Assignment	Hours	Category	Catalogs of Courses
Additional/Any/Elective Hours Requirement			
Categories that may be applied (optional)			

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Appendix E – Assign Specific Course Planning Worksheet

This is a Course Objective. It is used to assign specific course(s) to users, to be completed by a certain date. **Start Dates** are optional. Make additional copies as needed. Click [here](#) for directions.

Title	Start Date	Due Date	Expiration Date
Courses			
Groups		Users	
Notification Emails <small>(send emails to personnel of NEW and Incomplete assignments)</small>	Warning Threshold in Days <small>(1-60 days prior to the due date to begin warning incomplete personnel)</small>	Optional Note Included in Emails <small>(text to be added to notification emails sent to your personnel when they are first given the assignment and when they are almost due)</small>	
Yes No			

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Appendix F – Assign Credit Hours Planning Worksheet

This is an Hour Objective. It is used to assign specific hours of training in a category to be completed by a certain date. For the Catalog of Courses area, choose a catalog from which you want the courses pulled. **Start Dates** are optional. Make additional copies as needed. Click [here](#) for directions.

Title		Start Date	Due Date	Expiration Date
Hours	Category	Catalog of Courses		
Groups		Users		
Notification Emails	Warning Threshold in Days	Optional Note Included in Emails		
(send emails to personnel of NEW and Incomplete assignments)	(1-60 days prior to the due date to begin warning incomplete personnel)	(text to be added to notification emails sent to your personnel when they are first given the assignment and when they are almost due)		
Yes No				

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Appendix G – Make Catalog Available Planning Worksheet

This is a Self-enroll Objective. It is used to make courses available to users for them to complete as needed without any due dates. Click [here](#) for directions.

Title		
Course Catalog(s)		
Groups		Users
Notification Emails (send emails to personnel of NEW and Incomplete assignments)	Warning Threshold in Days (1-60 days prior to the due date to begin warning incomplete personnel)	Optional Note Included in Emails (text to be added to notification emails sent to your personnel when they are first given the assignment and when they are almost due)
Yes No		

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Appendix H – Document Manager Planning Worksheet

The Document Manager allows you to share folders to personnel in groups. Personnel will see their shared folders in the DOCUMENTS tab in the main menu. Make additional copies as needed. Click [here](#) for directions.

Folder Title
Share with Groups
Files to be Added

Folder Title
Share with Groups
Files to be Added

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Appendix J – Assign Document Planning Worksheet

This is a Document Objective. It is used to require that your personnel read a document you have uploaded to the Document Manager, and attest that they have read it. **Start Dates** are optional. Make additional copies as needed. Click [here](#) for directions.

Title		Start Date	Due Date	Expiration Date
Document (only one document can be assigned per assignment)				
Groups		Users		
Notification Emails	Warning Threshold in Days	Optional Note Included in Emails		
(send emails to personnel of NEW and Incomplete assignments)	(1-60 days prior to the due date to begin warning incomplete personnel)	(text to be added to notification emails sent to your personnel when they are first given the assignment and when they are almost due)		
Yes No				

GETTING STARTED IMPLEMENTATION GUIDE

Appendix K – Create an Account/Join a Group Sample Email

Subject: On-line Training with the CentreLearn Training System

Welcome to the CentreLearn Training System at <http://www.centrelearnsolutions.com>. To set up your account and enter your credentials, click on the following link: [<Insert Invite Link Here>](#). If you already have an account, still click the link and then login. Additional links may be emailed to you. Please follow each link to ensure all of your credentials are entered.

Appendix L – Notifying Personnel Sample Email

Subject: On-line Training with the CentreLearn Training System

Welcome to the CentreLearn Training System! Your username is [<Insert Username>](#) and your password is [<Insert password>](#).

Please go to <https://login.centrelearnsolutions.com/> to log into the New CentreLearn Training System. Enter your username (email), password, and then click “Log In”. If your Profile is missing information, click the “Resolve Now” link.

To reset your password, please go to the Profile tab.

Your HOME page has your current assignments. Use **Select a Course** to find out what courses are available to complete. Click **Start Course** to start a course. After completing a course, your certificate can be printed immediately or later by clicking on **Records** page.

You can also visit the [CentreLearn Personnel Support](#) page or visit the [CentreLearn YouTube Channel](#) where they have added how-to videos.

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