



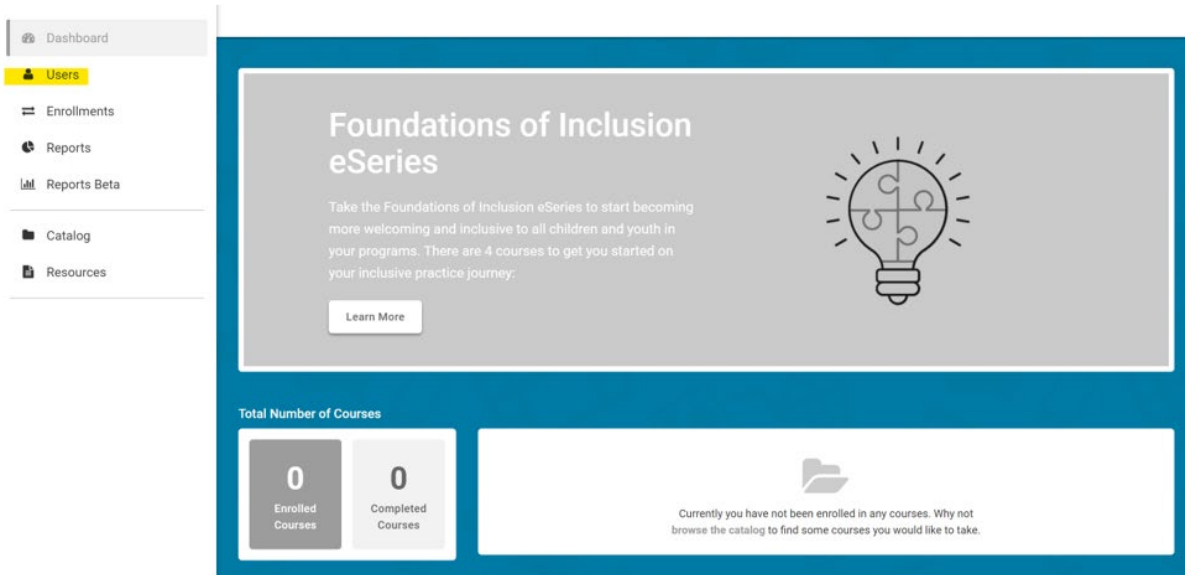
Coast Guard Portal Manager Permissions Guide

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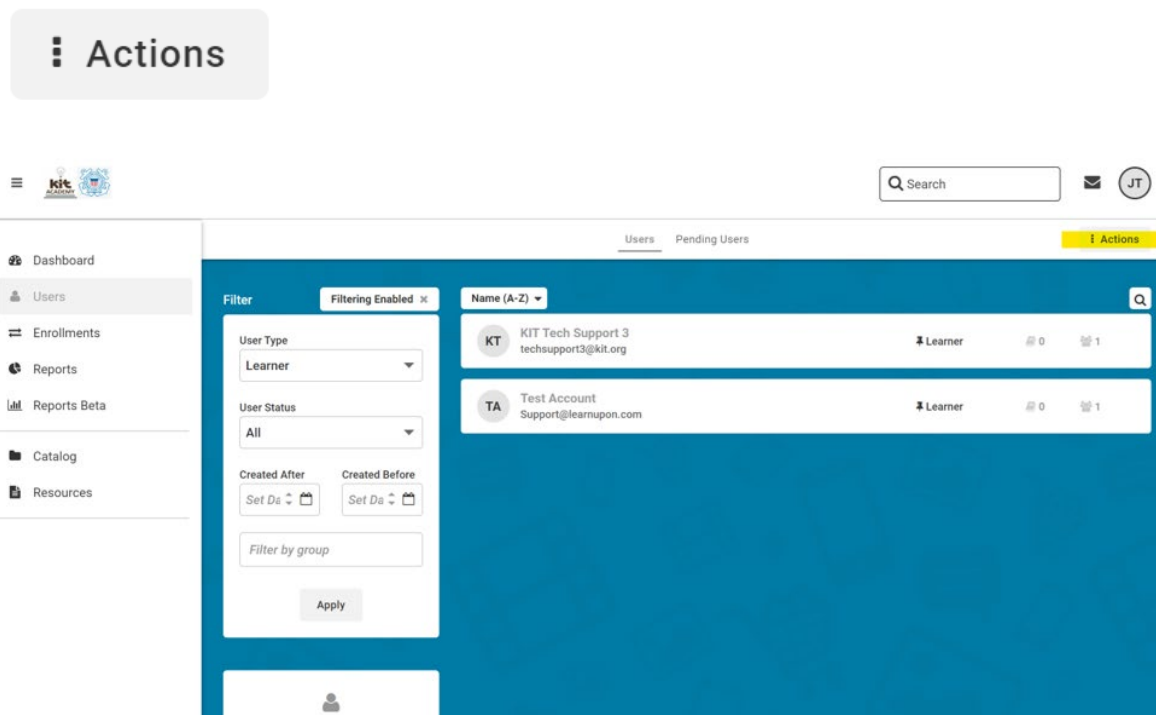
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Adding Staff Accounts

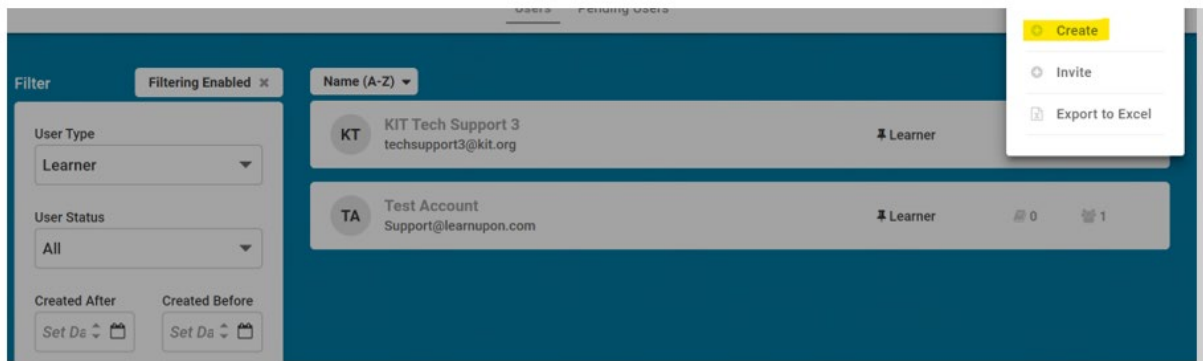
Select 'Users' from the left menu:



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



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.

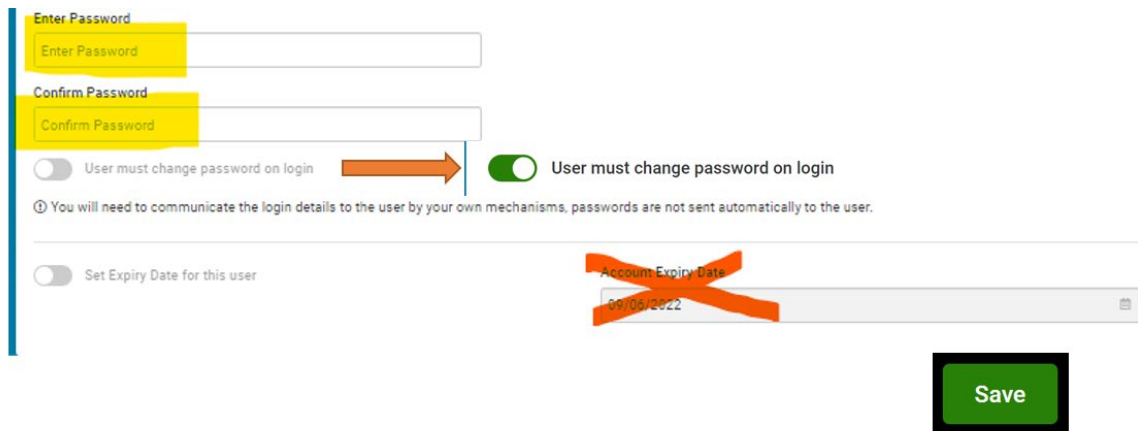
A screenshot of the user creation form. On the left, there's a 'Users Tips' sidebar. The main form has three input fields: 'First Name', 'Last Name', and 'Email Address'. Below these is a section titled 'Type of User & Permissions' with a dropdown menu. Underneath is a section titled 'How will new users get their login details?'. It contains a note: 'Note: If user already exists in one of your portals, their existing password will not be updated'. Below the note is a toggle switch for 'Send invite to user?'. The toggle is currently off. To the left of the toggle is a red 'X' icon and a green circle icon. Below the toggle is a text box explaining: 'If checked, we will send the user to access, whereby they must set their password before logging in. If you do not require this function, uncheck the box and provide a password yourself.' At the bottom, there's a toggle for 'Set Expiry Date for this user' and a field for 'Account Expiry Date'.

Enter a Password

Confirm the Password

*Write down the password to give to users.

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



The image shows a user management form with several fields and controls. The 'Enter Password' and 'Confirm Password' labels and their respective input fields are highlighted in yellow. An orange arrow points from the 'User must change password on login' toggle to the right. The 'Account Expiry Date' field is crossed out with a large orange 'X'. A green 'Save' button is located at the bottom right.

Enter Password

Enter Password

Confirm Password

Confirm Password

☐ User must change password on login ☒ User must change password on login

ⓘ You will need to communicate the login details to the user by your own mechanisms, passwords are not sent automatically to the user.

☐ Set Expiry Date for this user

Account Expiry Date

09/05/2022

Save

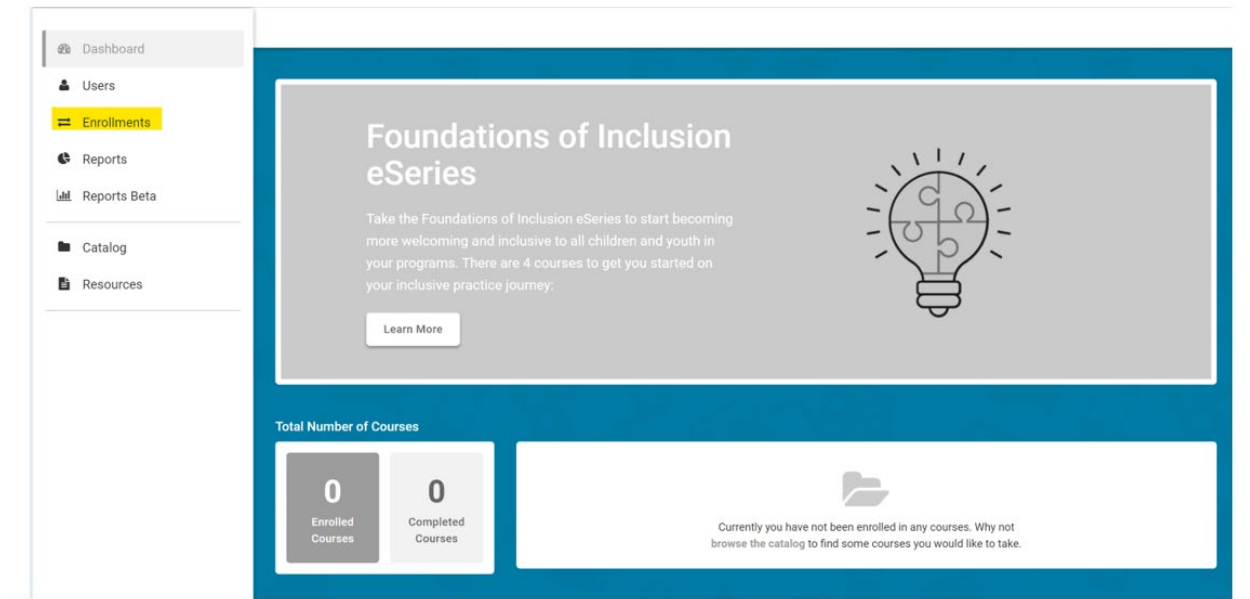
Ignore the 'Account Expiry Date' field.

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

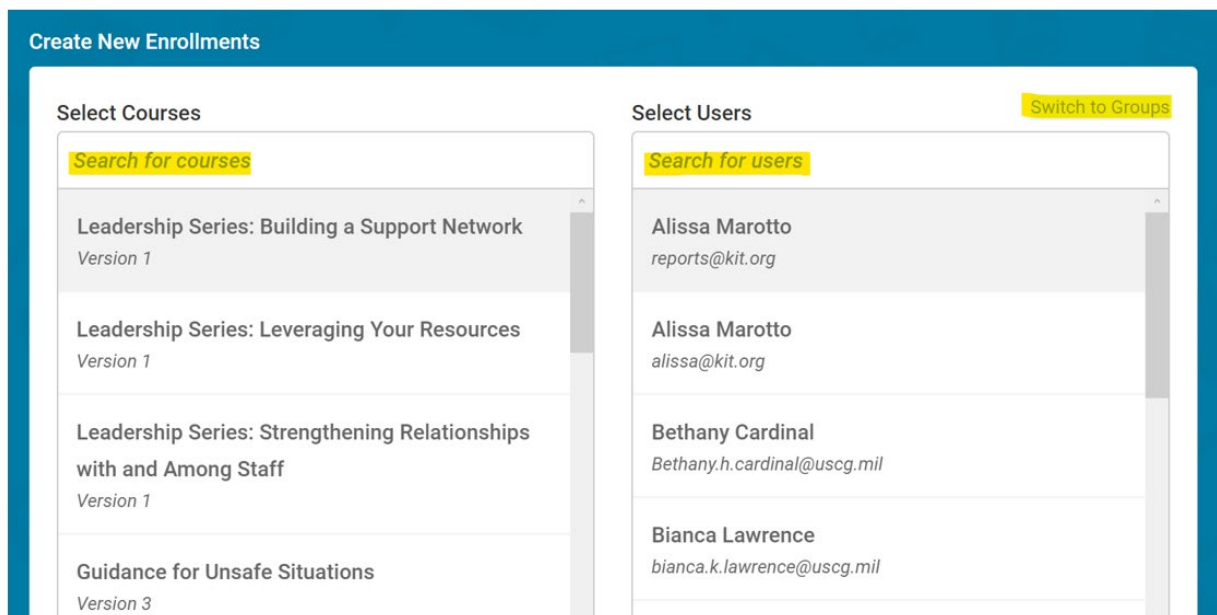
From the Dashboard select 'Enrollments' from the left menu.



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.

The screenshot shows the 'Create New Enrollments' interface. On the left, under 'Select Courses', the course 'Guidance for Unsafe Situations' is selected and highlighted with an orange box. Below it are other courses: 'Leadership Series: Building a Support Network Version 1', 'Leadership Series: Leveraging Your Resources Version 1', and 'Leadership Series: Strengthening Relationships with and Among Staff'. On the right, under 'Select Users', the user 'Alissa Marotto' is selected and highlighted with an orange box. Below her are other users: 'Bethany Cardinal', 'Bianca Lawrence', and 'Daniel Caragan'. A 'Switch to Groups' link is visible in the top right of the 'Select Users' section.

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

This close-up shows the bottom right corner of the interface. It features a green 'Enroll' button and a grey 'Cancel' button, both highlighted with orange boxes.

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

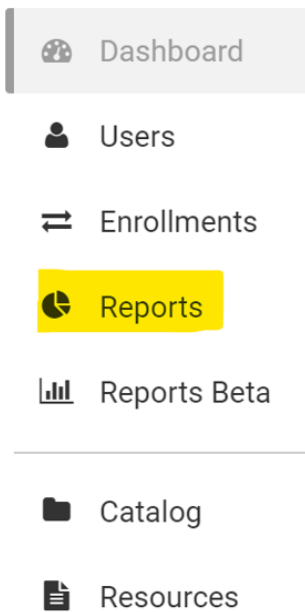
Select 'Switch to groups' in the upper right hand of the selection menus. See below:

The screenshot shows the 'Create New Enrollments' interface with the 'Switch to Groups' option selected. On the left, under 'Select Courses', the course 'Unpacking Behavior: Is it expect...' is selected and highlighted with an orange box. Below it are other courses: 'What's that you say? Speech Language and Communication Basics Version 3' and 'Self-Regulation Series: Staying Grounded - Refueling for Improved Self-Regulation in School Age Care Version 5'. On the right, under 'Select Groups', the group 'USCG Academy' is selected and highlighted with a yellow box. Below it is 'All Coast Guard'. A 'Switch to Users' link is visible in the top right of the 'Select Groups' section.

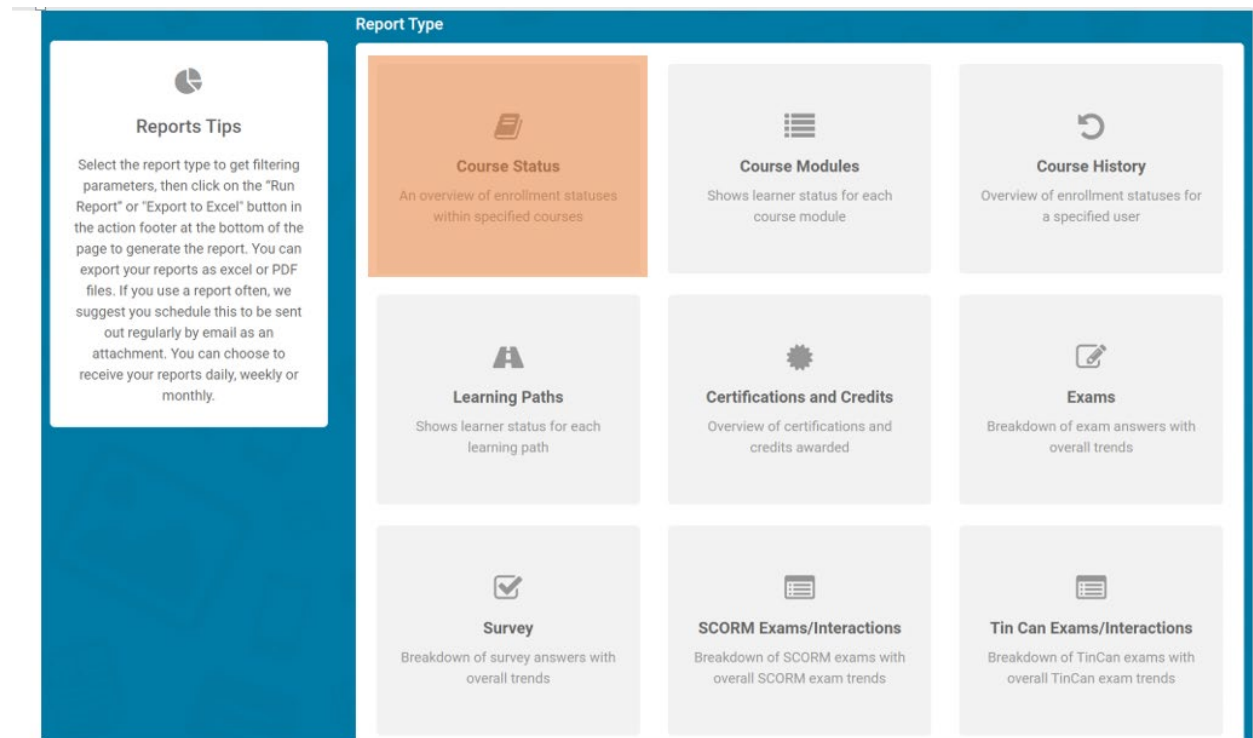
Once again, don't forget to select ENROLL at the bottom right of the screen.

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.'

Filters

Reports Tips

Select the report type to get filtering parameters, then click on the "Run Report" or "Export to Excel" button in the action footer at the bottom of the page to generate the report. You can export your reports as excel or PDF files. If you use a report often, we suggest you schedule this to be sent out regularly by email as an attachment. You can choose to receive your reports daily, weekly or monthly.

Report Type

Course Status

Date From

Set Date

Date To

Set Date

Courses

Search by course name

- Guidance for Unsafe Situations v.3
- 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
- Partnering with Families (Course 4 Foundations of Inclusion eSeries) v.3
- Partnering with Families (Course 4 Foundations of Inclusion eSeries) v.2

Select all | Deselect all

Groups

- All Coast Guard
- USCG Academy

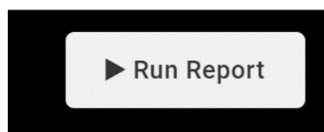
Statuses

- Pending Review
- Completed
- Passed
- Failed
- Past Due

User Status

- Login enabled
- 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.

Search by course name:

- Guidance for Unsafe Situations v.3
- 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
- Partnering with Families (Course 4 Foundations of Inclusion eSeries) v.3
- Partnering with Families (Course 4 Foundations of Inclusion eSeries) v.2
- Partnering with Families (Course 4 Foundations of Inclusion eSeries) v.1

Select all Deselect all

User Status

Login enabled

Login disabled

User Type

Learner

Admin

Instructor

Manager

All Coast Guard

USCG Academy

Statuses

Pending Review

Completed

Passed

Failed

Past Due

Custom User Data Filters

1. Base/Station

Choose a filter...

2. My Role

Choose a filter...

3. My race/ethnicity

Choose a filter...

5. The primary group I work with (select one):

Choose a filter...

6. Confidence: At this moment in time, I am confident in my ability to support children & youth with disabilities and challenging behavior.

Choose a filter...

Run Report

Reset Filters

Export to Excel

Export to PDF

Schedule

Custom User Data Filters

1. Base/Station

Choose a filter...

2. My Role

Choose a filter...

3. My race/ethnicity

Choose a filter...

5. The primary group I work with (select one):

Choose a filter...

6. Confidence: At this moment in time, I am confident in my ability to support children & youth with disabilities and challenging behavior.

Choose a filter...

Run Report

Reset Filters

Export to Excel

Export to PDF

Schedule

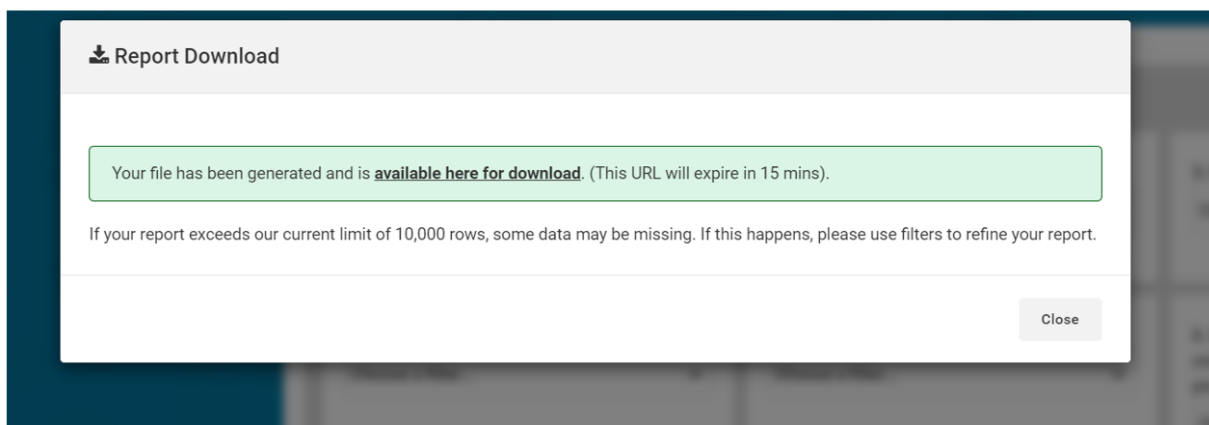
Once you click on Run Report, you will see all of the learners from the group or station you selected that 'passed' any of the courses. The report will look something like this:

| 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 |

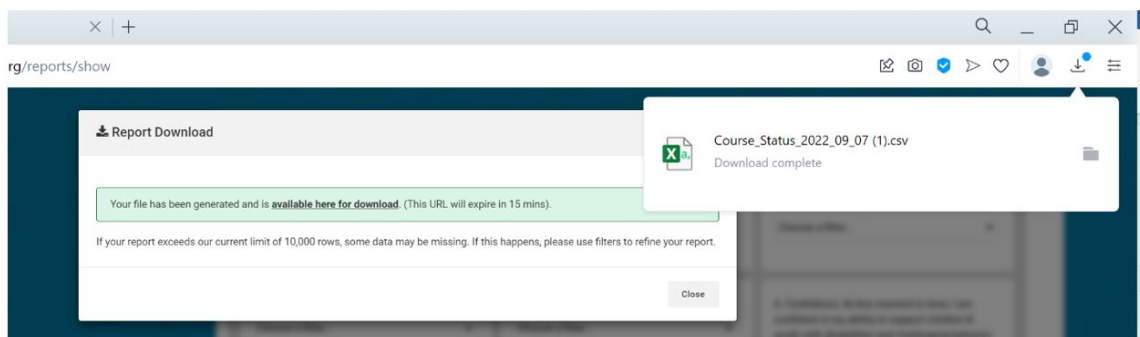
| Infant/Toddler Series: Safe Ways to Meet the Need to Climb v.1 | | | | | | | |
|--|------------|------------|------------|------------|------------|-------|--------|
| <input type="checkbox"/> | Name | Email | Enrolled | Started | Completed | Score | Status |
| <input type="checkbox"/> | Jules Test | [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:



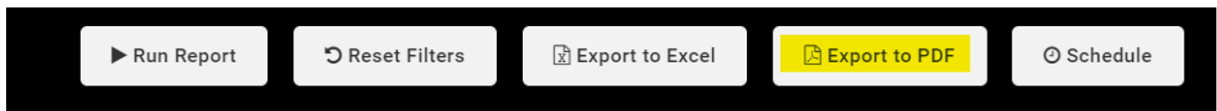
It will vary by computer, however, you may see the 'download complete' on the upper corner of your computer screen.



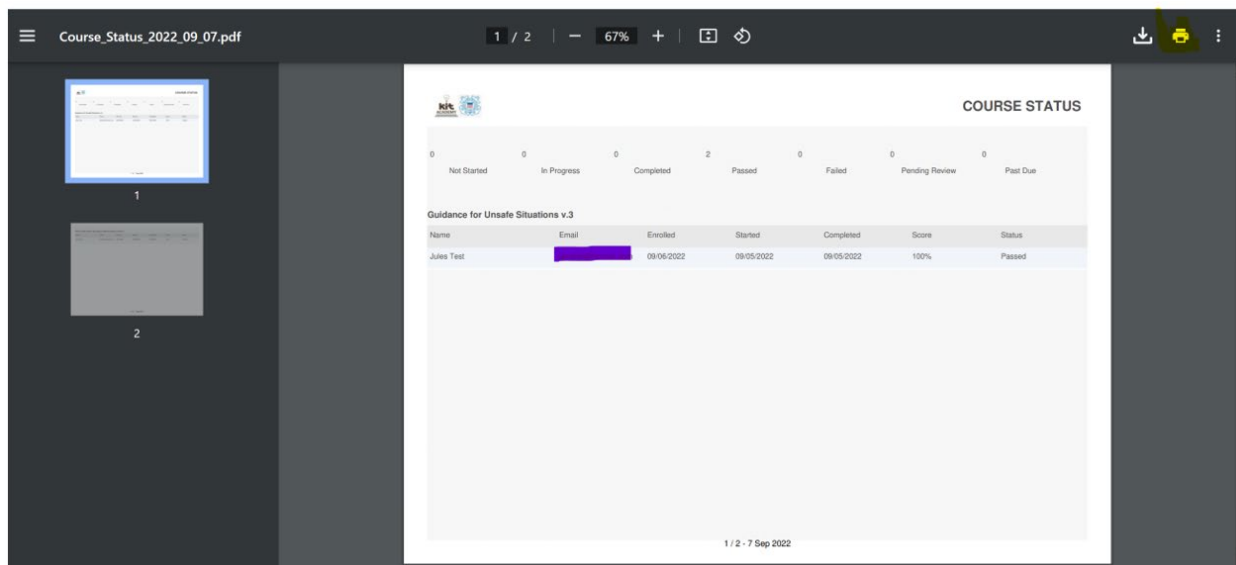
Select the file from your downloads and open up the Excel Spreadsheet and it will look similar to this:

| File | | | | | | | | | | | | | | | | | Home | Insert | Draw | Page Layout | Formulas | Data | Review | View | Help | Acrobat | Comments | Share |
|-----------|-----------------------------------|-------------|-------|---------|---------|-----------------------|-------------|----------|---------------------|----------|----------|------------------------|------------|-----------|-----------|-------|--------|------------|------------|-------------|--------------|----------|-------------|-------------|------|---------|----------|-------|
| Clipboard | | Font | | | | | Alignment | | | | | Number | | | | | Styles | | | | | Analysis | | Sensitivity | | | | |
| Paste | | Calibri 11 | | | | | General | | | | | Conditional Formatting | | | | | Cells | | Editing | | Analyze Data | | Sensitivity | | | | | |
| Font | | Font | | | | | Alignment | | | | | Number | | | | | Styles | | | | | Analysis | | Sensitivity | | | | |
| A1 | | Not Started | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | | | | | | | |
| 2 | Not Starte In Progress: Completed | | | | 0 | Failed | | 2 | Pending Rr Past Due | | 0 | 0 | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | 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 | Percentage | Expiration | Base/St | | | | | | | |
| 6 | Jules | Test | | Yes | - | Guidance for Unsafe | 9/6/2022 | - | - | 9/5/2022 | 9/5/2022 | 9/5/2022 | - | 100% | Passed | 100% | Passed | No | - | - | USCG A | | | | | | | |
| 7 | Jules | Test | | Yes | - | Infant/Toddler Series | 9/6/2022 | - | - | 9/2/2022 | 9/2/2022 | 9/2/2022 | - | 100% | Passed | 100% | Passed | No | - | - | USCG A | | | | | | | |
| 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

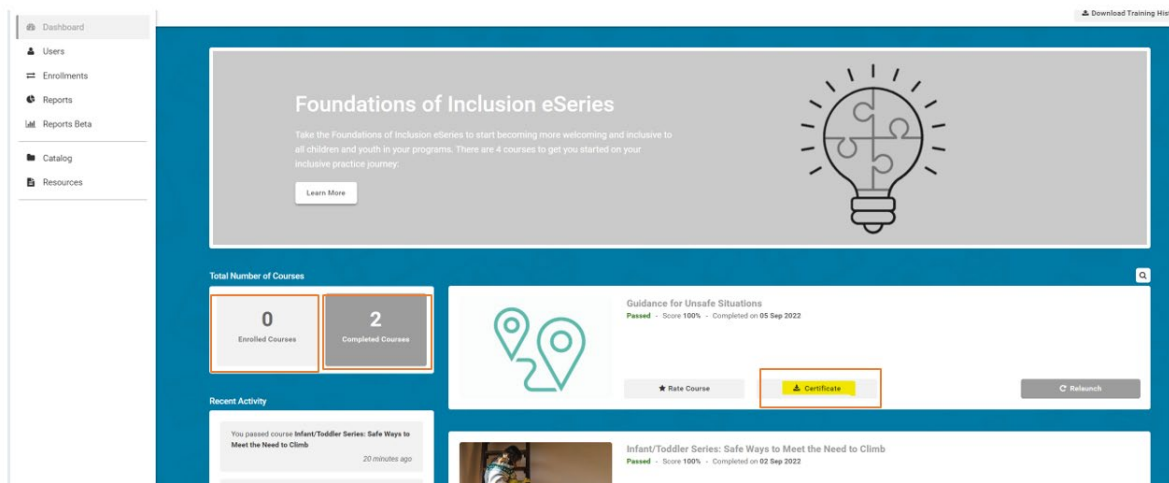
Go to the Dashboard

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

Select 'Completed Courses'.

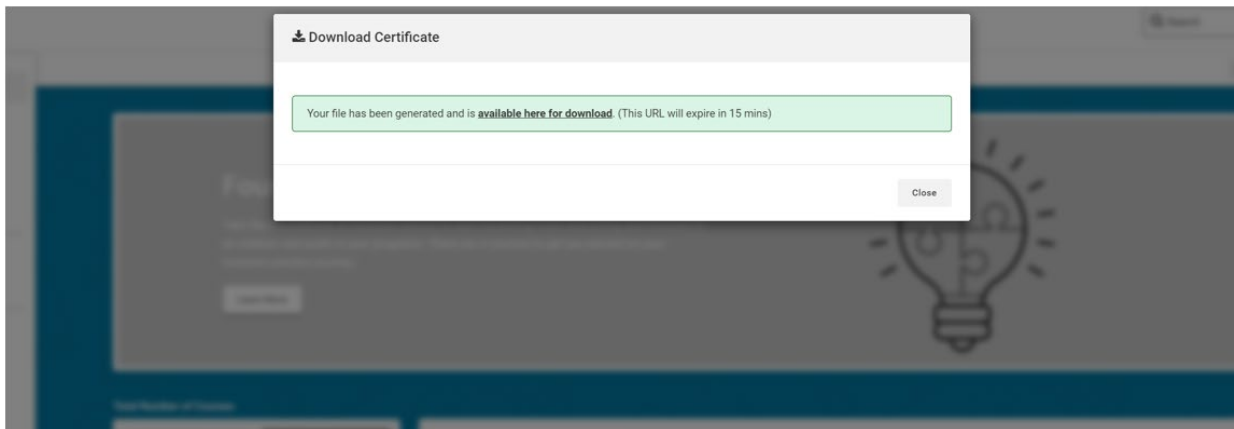
On the Right Side you will see the courses you have completed.

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, reading "Torrie Dunlap".

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

06/03/2022

Date



Kids Included Together is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU. 21670 Ridgeway Circle, Suite 170, Sterling, VA 20166

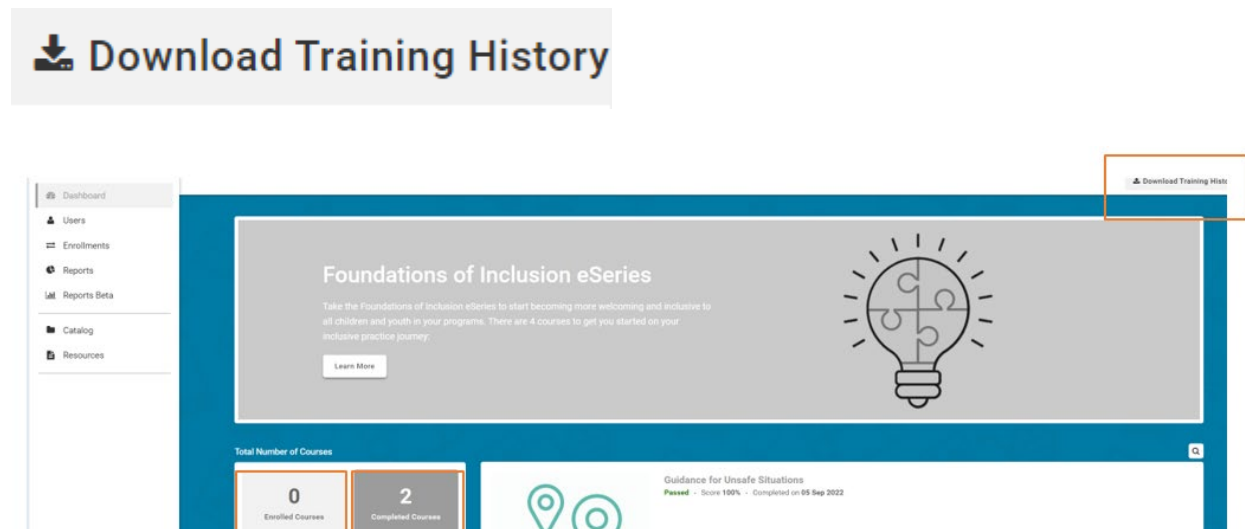
Downloading the Training History

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 O'Tricks | Completed | 08/17/2021 | 08/17/2021 | 100% | Passed |