



American
Heart
Association.

ATLAS USER MANUAL

Training User Management

A navigation guide for the Atlas application

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1. Introduction

The American Heart Association (AHA) is dedicated to saving more lives through research, training, and education designed and owned by the AHA. CPRverify is a web-based application designed specifically to support AHA training internationally. The Instructor Network serves the same purpose within the United States.

These applications make it possible for Training Centers and instructors to monitor and track their AHA training, including publishing classes for students to sign up for, managing student rosters, and many other functions. They also provide the ability for managing Training Center alignments and permission.

Currently, the 2 applications are separate to cater to different geographies, either within or outside of the United States. Atlas is a reimagined solution that caters to the global market. This digital platform is available to the AHA training network, including Training Centers, sites, instructors, and students who are located anywhere in the world, working together to make a difference and save more lives.

2. Purpose

The purpose of Atlas is to provide a single application for all audiences across the world. This document has been created to help ensure a smooth onboarding journey, focusing on the different capabilities within the Atlas application, and will serve as an instructional guide for users to successfully navigate and perform various application functions within the system.

3. Intended Audience

The intended audience includes Training Center Coordinator (TCC), Training Site Administrator (TSA), Training Center Administrator (TCA), Training Site Coordinator (TSC), Training Faculty, instructors, and students.

4. Abbreviations and Descriptions

Abbreviation	Description
TC	Training Center
TCA	Training Center Administrator
TCC	Training Center Coordinator
TS	Training Site
TSA	Training Site Administrator
TSC	Training Site Coordinator

5. Viewing Instructors

Instructors play a key role in delivering classes through Training Centers and Training Sites.

5.1 View

- Login as **TCC/TCA/TSC/TSA** as highlighted in Figure 1.



Figure 1. TCC Login.

- Select **Training Center** from the main navigation menu, and then select **Instructors** from the drop-down, as highlighted in Figure 2.

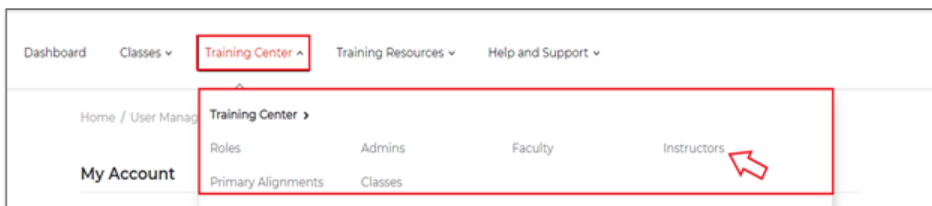


Figure 2. Training Center main navigation menu—Instructors sub menu.

- The **Instructors** page displays the Pending Alignments, as shown in Figure 3.

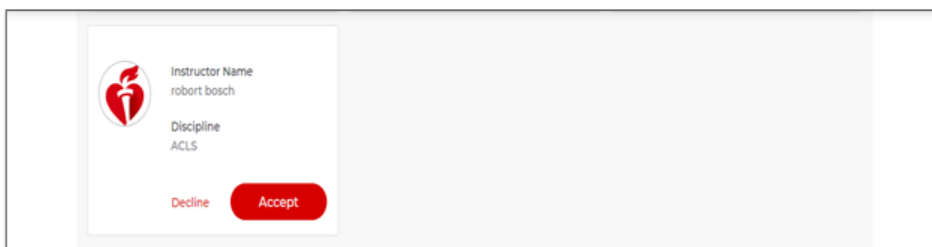
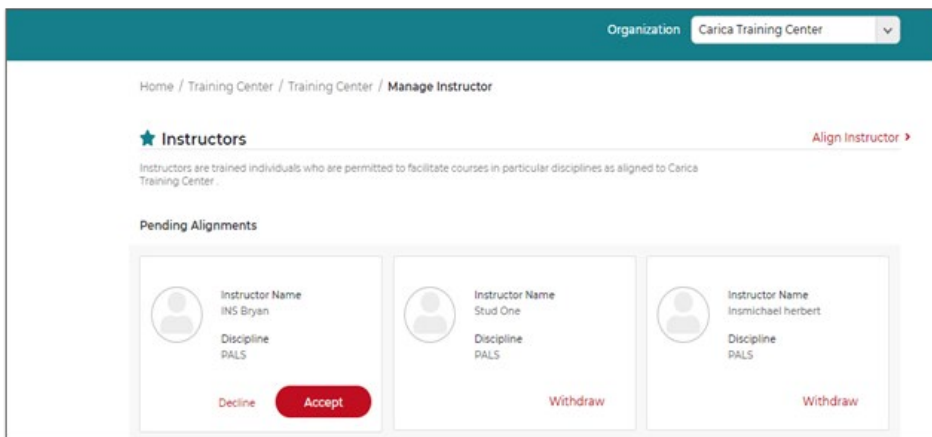


Figure 3. Instructors page—View

5.1.1 Instructors List

When users navigate to the **Instructors** page, the Instructors list displays records of all the instructors aligned with their Training Center or Training Site.

- Select a Training Center or Training Site from the **Organization** drop-down, as highlighted in Figure 4.

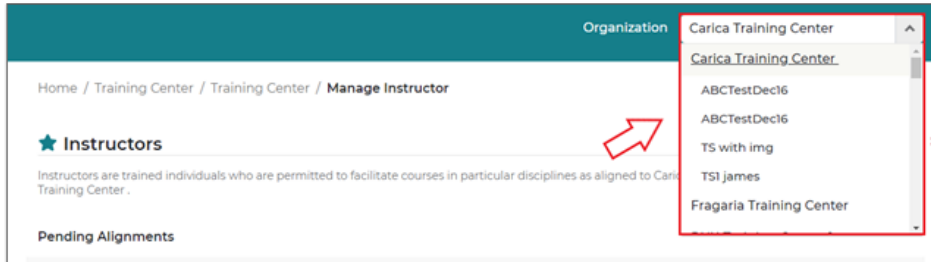


Figure 4. Organization drop-down.

- Navigate through the **Instructors** page; the Instructors list displays as highlighted in Figure 5.

First Name/Instructor ID	Last Name	Email Address	Organization	Discipline	Actions
Bonita 2104753279	b	Ins_Bonita@mailinator.com	Carica Training Center	BLS	...
Hibiscus 20117678435	Userr	hibiscus.user@mailinator.com	TSI James	PALS BLS	...
Hibiscus 20117678435	Userr	hibiscus.user@mailinator.com	Carica Training Center	PALS BLS	...
Hibiscus 20117678435	Userr	hibiscus.user@mailinator.com	ABCTestDec16	ACLS	...
Hibiscus 20117678435	Userr	hibiscus.user@mailinator.com	ABCTestDec16	ACLS	...
Hibiscus 20117678435	Userr	hibiscus.user@mailinator.com	TS with img	AGLS	...

InsJames 21016148060	newcome	Ins_James.newcome@mailin...	Carica Training Center	PALS	...
InsLane 21013078848	Hughes	Ins_Lane.Hughes@mailinato...	abc latest1234	PALS BLS	...
InsIiz 21011982384	mcknight	Ins_iz.mcknight@mailinator...	abc latest1234	BLS	...
Instructor 20102535861	Stage	instructor.stg@mailinator.com	abc latest1234	BLS	...

Showing 1 to 10 of 43 results

Figure 5. Instructors list.

5.1.2 Instructors List Filters

Users can apply filters to display the Instructors list.

Training Site (TS) Name

- If users select an option from the **Training Site (TS) Name** drop-down, then the list displays the Instructors who belong to the selected Training Site, as shown in Figure 6.

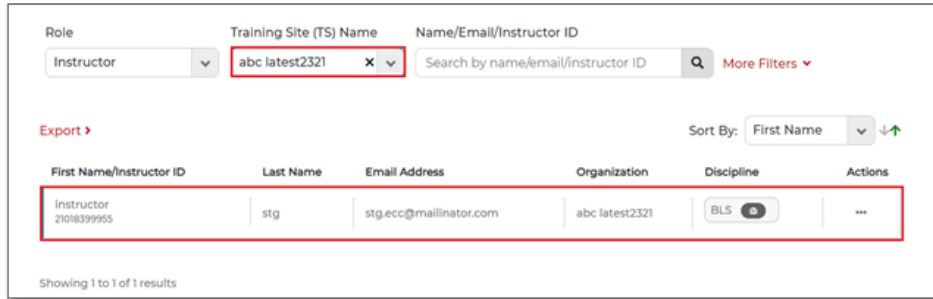


Figure 6. Training Site (TS) Name filter.

Name/Email/Instructor ID

- If users enter a value in the **Name/Email/Instructor ID**, then the search result displays the Instructors based on the input provided (Email ID, as shown in Figure 7).

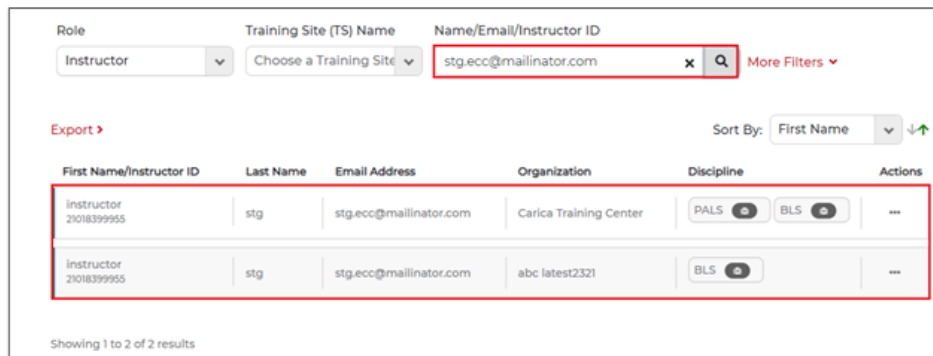


Figure 7. Name/Email/Instructor ID text box.

- For more filters, users can select **More Filters**, as highlighted in Figure 8.

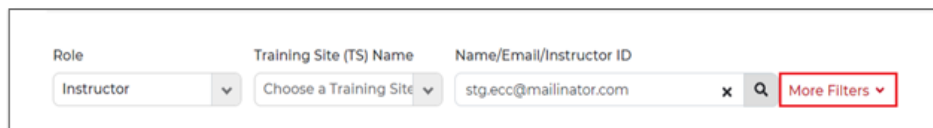


Figure 8. More Filters.

- Select **More Filters**; Disciplines and Alignment Status will be visible.

Disciplines

- Users can select options from the **Disciplines** drop-down, as highlighted in Figure 9.

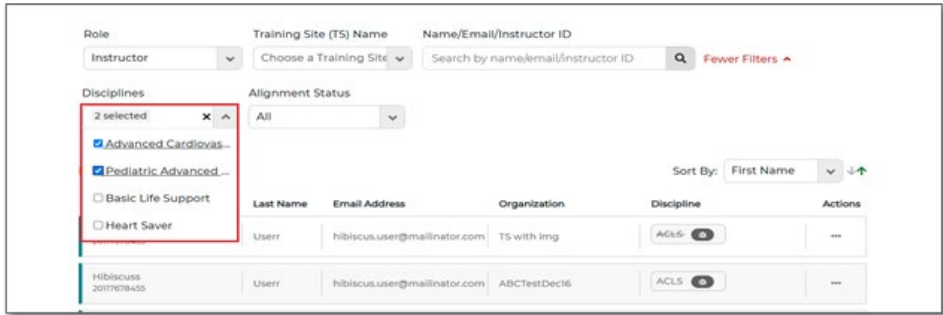


Figure 9. Disciplines filter.

- Select the options from the **Disciplines** drop-down (**ACLS, PALS** shown here); the Instructors list displays as highlighted in Figure 10.

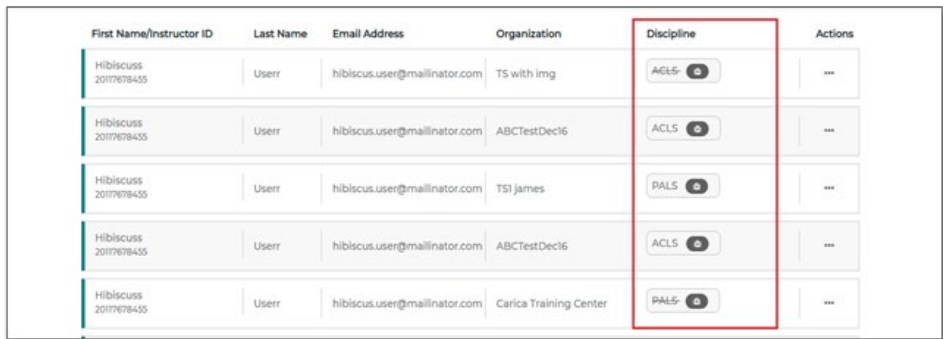


Figure 10. Instructor list display based on selected disciplines.

Alignment Status

- Users can select an option from the **Alignment Status** and display the Instructors list accordingly, as highlighted in Figure 11.

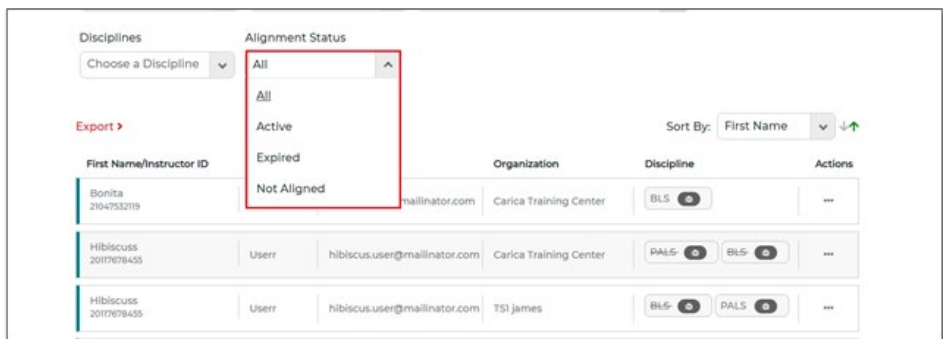


Figure 11. Alignment Status filter.

Export and Sort By

- Users can export the Instructors list by selecting the **Export** link, as highlighted in Figure 12.

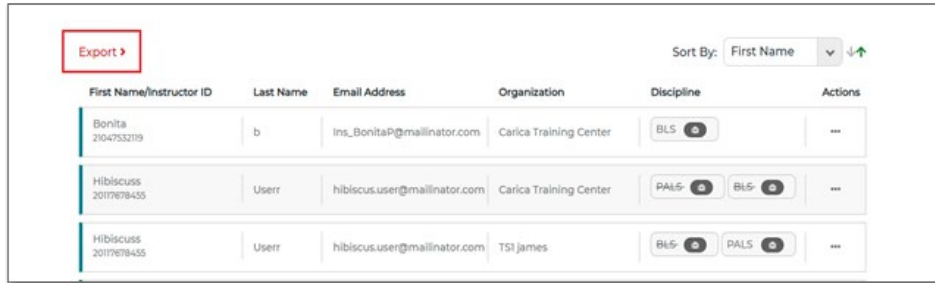


Figure 12. Instructors list—Export link.

- The exported Instructors list downloads as a CSV file.
- Users can sort the Instructors list in ascending or descending order by selecting **First Name** or **Last Name** from the **Sort By** drop-down, as highlighted in Figure 13.

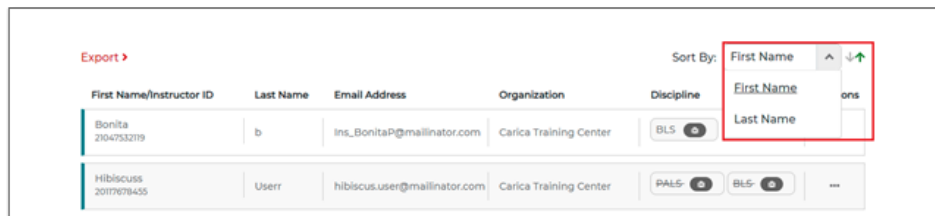


Figure 13. Instructors list—Sort by drop-down.

6. Manage Roles

6.1 Manage TCA

Training Center Administrators (TCA) can administer the functionalities of a Training Center according to their role privileges.

- Log in as a **TCC** user as shown in Figure 14.



Figure 14. TCC Login.

- Select **Training Center** from the main navigation menu, and then select **Admins** from the drop-down under **Training Center**, as shown in Figure 15.

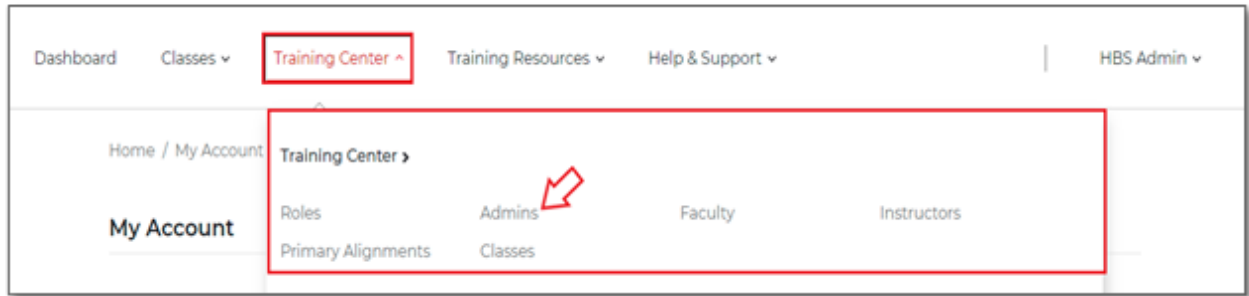


Figure 15. Training Center main navigation menu—Admins sub menu.

- The Training Center Administrators page displays the Pending Request(s), as shown in Figure 16.

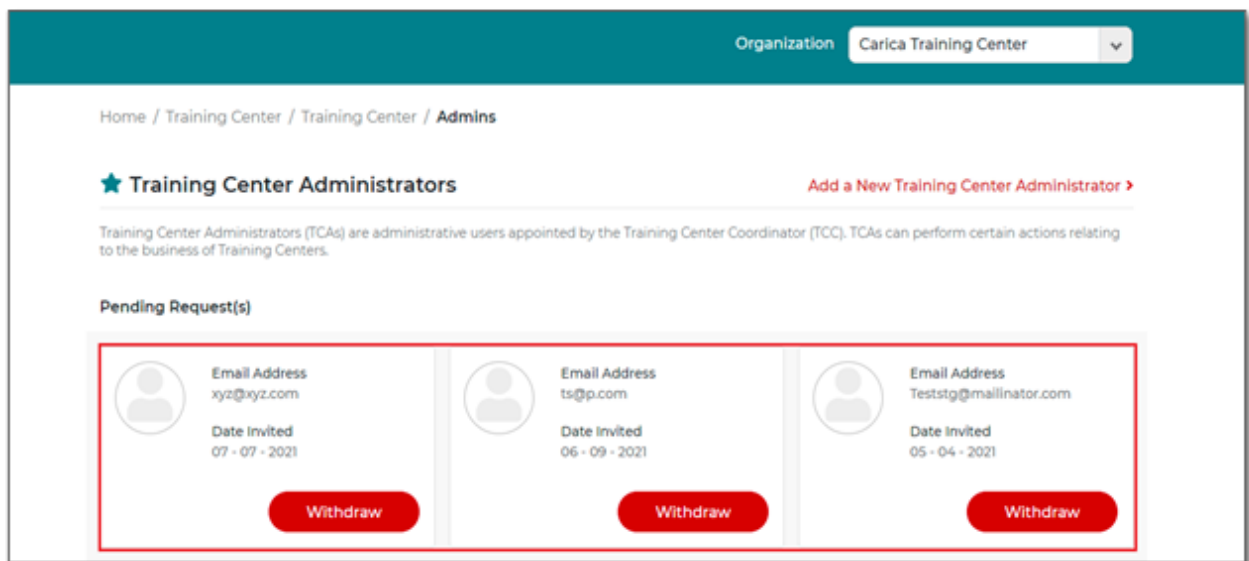


Figure 16. Training Center Administrators page—Pending Requests.

- When users navigate through the Pending Request(s), the TCA list displays, as shown in Figure 17.

Export > Sort by: First Name ↓↑

First Name	Last Name	Email Address	Action(s)
Roletca	Tca	inviteroleTCA12@mailinator.com	...
Roletesttca	Tcastage	roletesttca@mailinator.com	...
Stgtcc 21058858554	Usero	stg_tccuser1@mailinator.com	...
Tcc 21033035164	Admin	qa_tccuser2@mailinator.com	...

Showing 1 to 4 of 4 Results

Figure 17. TCA list .

- Users can view the **Pending Requests** and the **TCA** list for different organizations by selecting an option from the **Organization** drop-down on the top right corner, as shown in Figure 18.

Organization

Home / Training Center / Training Center / Admins

★ Training Center Administrators Add

Training Center Administrators (TCAs) are administrative users appointed by the Training Center Coordinator (TCC) to the business of Training Centers.

Pending Request(s)

Carica Training Center

Carica Training Center

ABCTestDec16

ABCTestDec16

TS with img

TSI james

Fragaria Training Center

DUY Training Center

Figure 18. Organization drop-down.

Note

- For registered users of Atlas, **Name** displays on the **request cards**. For the unregistered users, **Email Address** displays on the **request cards** in the **Pending Requests** section, as highlighted in Figure 19.

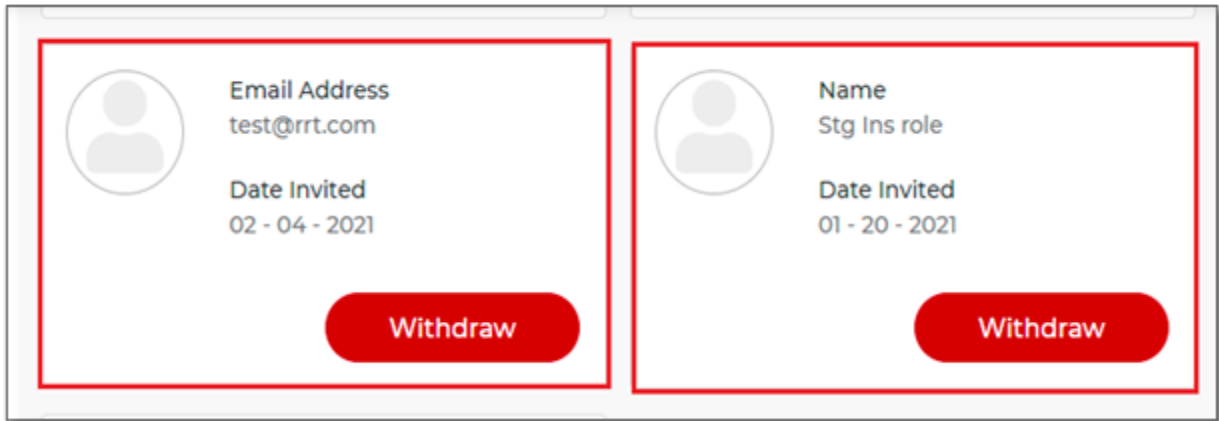


Figure 19. Pending Request section—Request Cards.

- Users with a **TCA** role and an **Instructor** role in other organizations displays along with an **Instructor ID** in the **TCA** list, as highlighted in Figure 20.

Export > Sort by: First Name v ↓↑

First Name	Last Name	Email Address	Action(s)
Roletca -	Tca	invitroleTCA12@mailinator.com	...
Roletesttca -	Tcastage	roletesttca@mailinator.com	...
Stgtcc 21058858554	Usero	stg_tccuser1@mailinator.com	...
Tcc 21033035164	Admin	qa_tccuser2@mailinator.com	...

Figure 20. Details of Instructor who is also a TCA .

6.1.1 Actions: Permissions

- Select a record from the TCA list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Permissions** link as shown in Figure 21.

First Name	Last Name	Email Address	Action(s)
Roletca	Tca	inviteroleTCA12@mailinator.com	...
Roletesttca	Tcastage	roletesttca@mailinator.com	...
Stgtcc 21058858554	Usero	stg_tccuser1@mailinator.com	
Tcc 21033035164	Admin	qa_tccuser2@mailinator.com	<div style="border: 1px solid red; padding: 2px;"> Delete Permissions </div>

Figure 21. TCA list – Permissions link.

- When the **Manage TCA Permissions** page displays, users can update the **Read** or **Write** permissions and **Enable** or **Disable** permissions for the set of features for each TCA, as shown in Figure 22.

Home / Training Center / Training Center / Admins / **Manage TCA Permission**

★ **Training Center Administrator Permissions for StgTCC usero**

Name
StgTCC usero

Permissions

Class Management	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Write
Other Trainings	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Roster Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Student Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Instructor Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write

The screenshot displays two sections of the 'Manage TCA Permissions' page. The first section contains a list of permissions, each with 'Read' and 'Write' checkboxes, all of which are checked. The second section contains a list of permissions, each with 'Enable' and 'Disable' radio buttons, all of which are selected to 'Disable'.

TCA Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
TSC Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Issue Exam	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Card POC Templates	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Monitoring	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Remediation	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
User Permissions	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
ORG Role Permissions	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Location Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
TSA Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write

Feedback	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
TS Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Inventory Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Edit TS Picture	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
View TS Info	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Edit TC Info	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
View TC Info	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Training Site Listing	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Figure 22. Manage TCA Permissions page.

- Once the changes done, select **Update** as shown in Figure 23.

The screenshot shows the bottom of the permissions page with three buttons: 'Cancel', 'Reset to default', and 'Update'. A red arrow points to the 'Update' button.

Figure 23. Permissions - Update button.

- This user action displays a pop-up prompting confirmation of the update; select **Apply Changes** as shown in Figure 24.

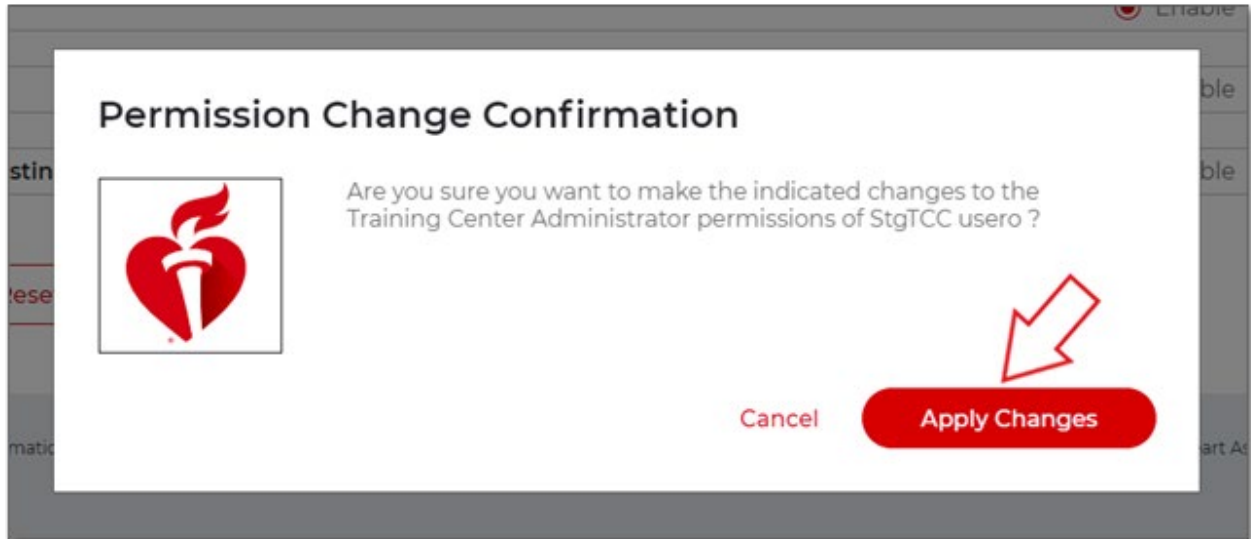


Figure 24. Permissions update confirmation pop-up.

- After users select **Apply Changes**, a success message appears on the **Training Center Administrators** page, as shown in Figure 25.

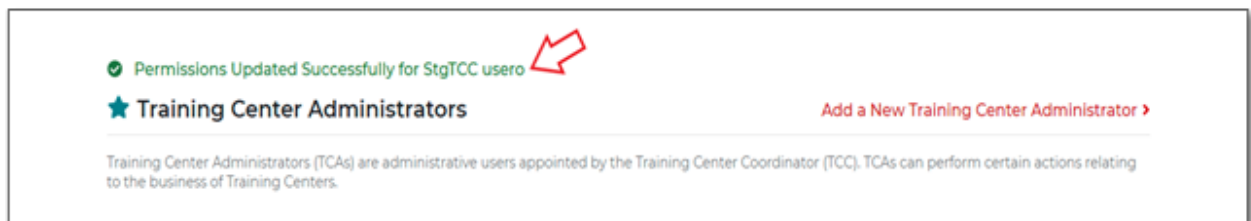


Figure 25. Permissions update success message.

- If users want to restore the permissions to the Organization’s default, they can select **Reset to default**, as highlighted in Figure 26.



Figure 26. Permissions—Reset to default button.

- This user action displays a pop-up prompting confirmation for resetting to default; select **Reset Permissions** as shown in Figure 27.

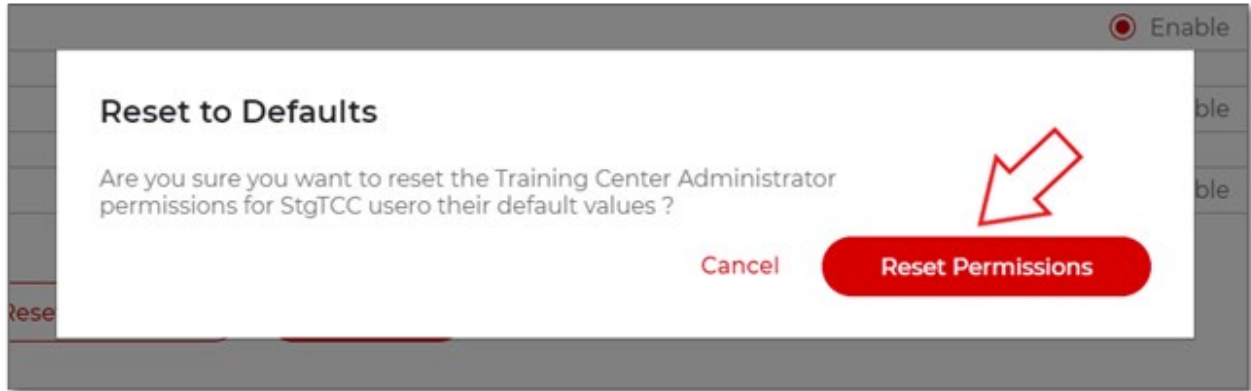


Figure 27. Reset to Defaults confirmation pop-up.

- After users select **Reset Permissions**, a success message appears on the **Training Center Administrators** page, as shown in Figure 28.

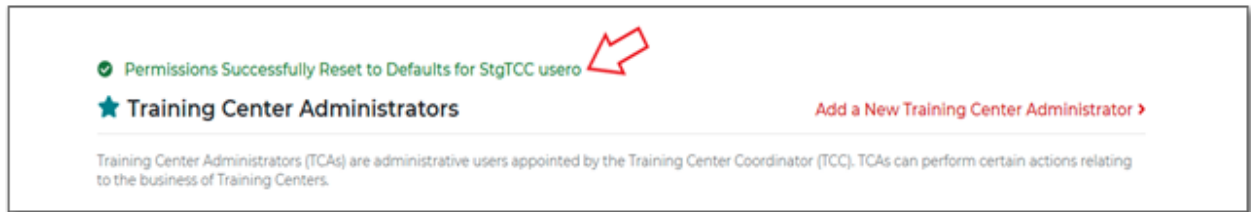


Figure 28. Reset to default permissions success message.

6.1.2 Actions: Delete

- Select a record from the TCA list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select **Delete** link as shown in Figure 29.

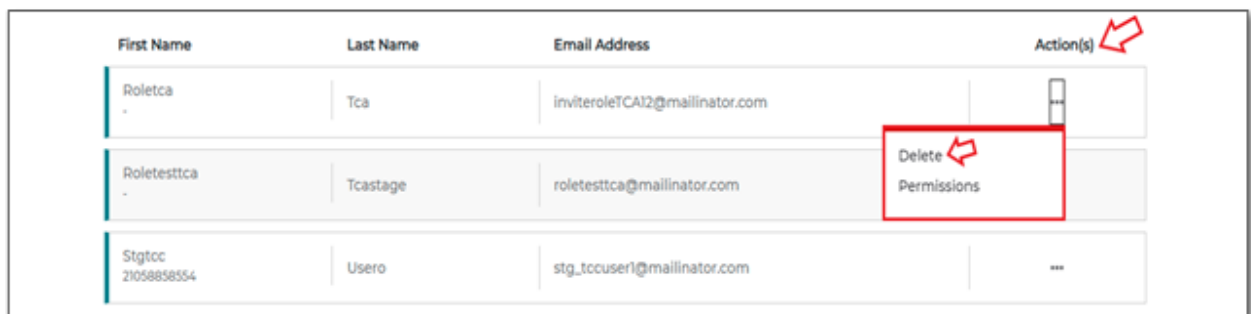


Figure 29. TCA list - Delete link.

- The above user action displays a pop-up prompting confirmation about the Delete, select **Delete** as indicated in Figure 30.

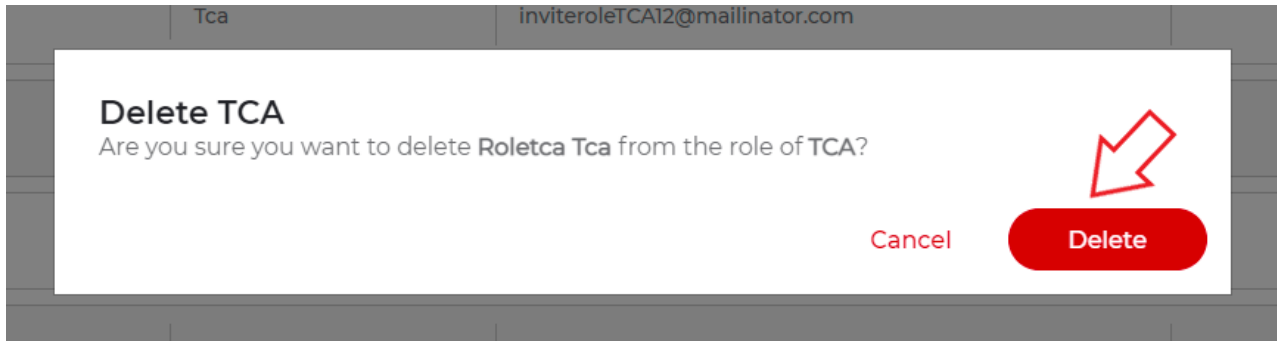


Figure 30. TCA deletion confirmation pop-up.

- Selecting **Delete**, a success message appears on the **Training Center Administrators** page saying, **“Successfully updated User”** as shown in Figure 31.



Figure 31. TCA deletion success message.

Note

Action **Delete** only deletes the TCA role of the user in the current Organization. If a user is TCA in another Organization, their role will continue to exist.

6.1.3 Add a New Training Center Administrator

- Users can add a new TCA to the Training Center by selecting the **Add a New Training Center Administrator** link on the top right corner, as highlighted in Figure 32.

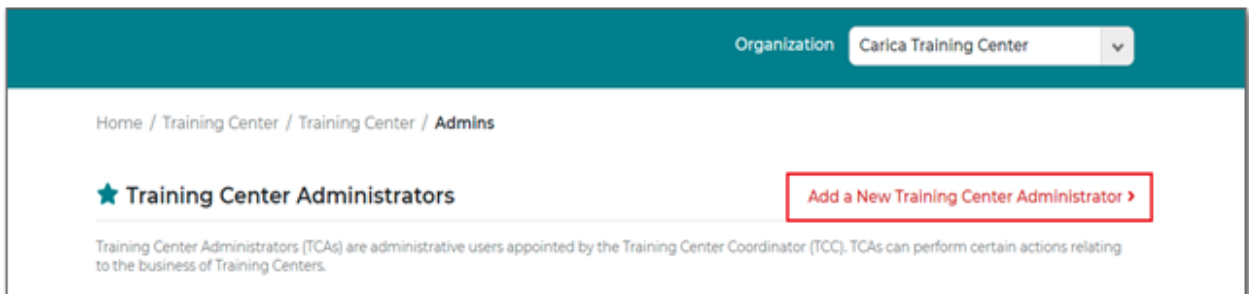


Figure 32. Add a New Training Center Administrator link.

- This user action displays an **Add a New Training Center Administrator** page. Enter the **Email Address** and select the radio button **Default** from **Permissions**, and then select **Send Invitation** as highlighted in Figure 33.

Home / Training Center / Training Center / Admins / Add a New TCA

Add a New Training Center Administrator

To invite a new Training Center Administrator (TCA) to Carica Training Center , please provide the information below. The user specified will receive a notification prompting them to accept your invitation.

Email Address *

Permissions *

Default Custom

Figure 33. Add a New Training Center Administrator page.

- After selecting the radio button **Custom**, users can customize the **Read** or **Write** permissions and **Enable** or **Disable** permissions for the set of features for the new TCA role, as shown in in Figure 34.

Permissions *

Default Custom

Other Trainings	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
Roster Management	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
Student Management	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
Instructor Management	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
TCA Management	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
TSC Management	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
Issue Exam	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write
Card POC Templates	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write


Monitoring	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Remediation	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
User Permissions	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
ORG Role Permissions	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Class Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Location Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
TSA Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write


Feedback	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
TS Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Inventory Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Edit TS Picture	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
View TS Info	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Edit TC Info	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
View TC Info	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Training Site Listing	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Cancel

Figure 34. New TCA Invite -Custom Permissions.

- After users select **Send Invitation**, a success message appears on the **Training Center Administrators** page stating **Invite sent successfully** as shown in Figure 35.

 TCA Invitation Successfully Sent to ksujesh755@gmail.com

 **Training Center Administrators** [Add a New Training Center Administrator >](#)

Training Center Administrators (TCAs) are administrative users appointed by the Training Center Coordinator (TCC). TCAs can perform certain actions relating to the business of Training Centers.

Figure 35. TCA Invite sent success message.

- The newly sent invite details will display as a **Request Card** in the **Pending Requests** section of the **Training Center Administrators** page, as highlighted in Figure 36.

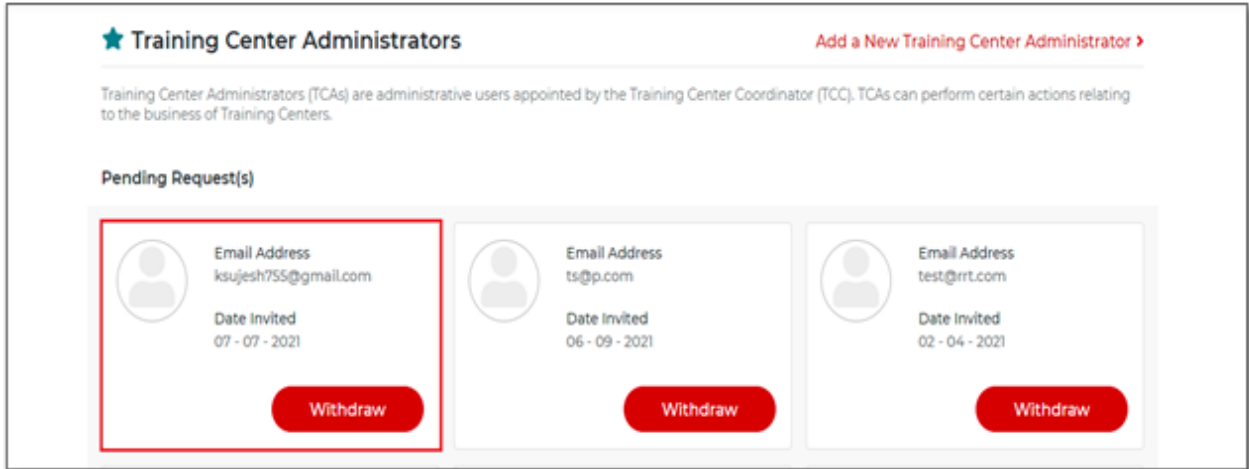


Figure 36. Pending Requests section—newly sent invite display.

- When users accept the invitation sent by the Organization, the **Request card** disappears from the **Pending Requests** section.

Note

- If users enter an already aligned person’s **Email Address** and try to send an invite, a warning message displays, as highlighted in Figure 37.

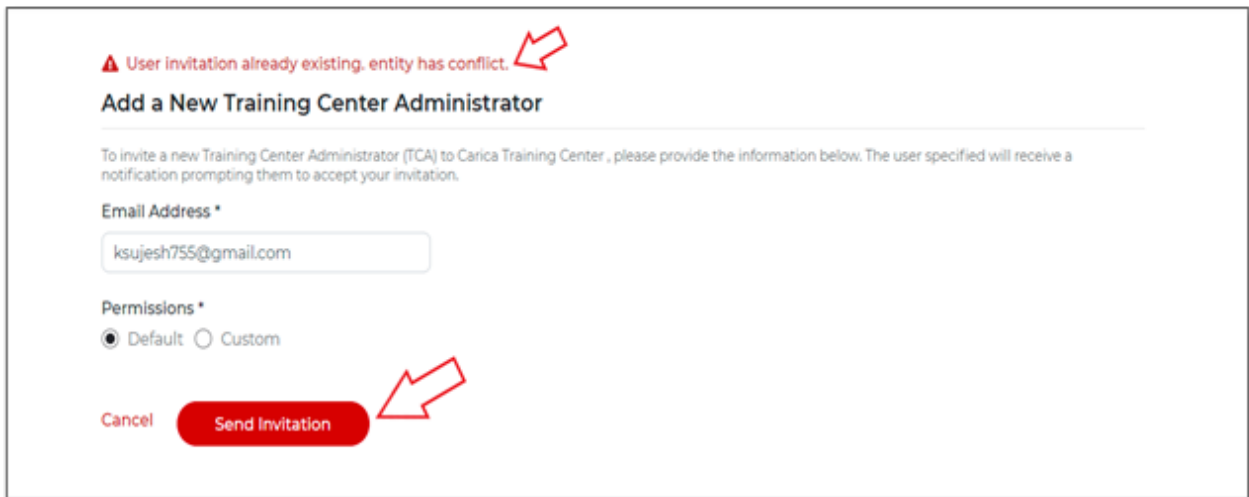


Figure 37. Duplicate Invitation warning message.

- If users enter an invalid **Email Address** and try to send an invite, an error message displays, as highlighted in Figure 38.

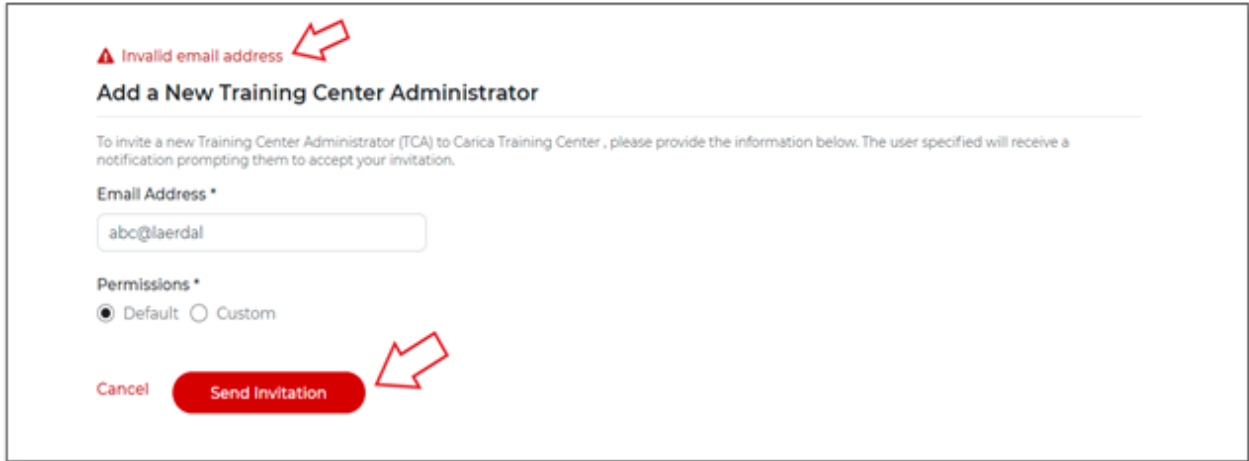


Figure 38. Invalid email address error message.

6.1.4 Withdraw Invite

- At any time, users can withdraw the invite by selecting **Withdraw** on the Request card, as highlighted in Figure 39.

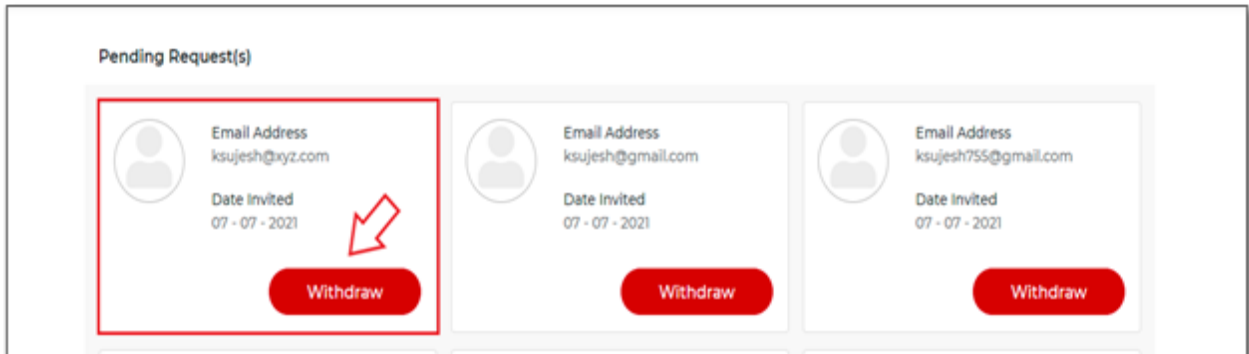


Figure 39. Request Card—Withdraw button.

- This user action displays a pop-up prompting confirmation; select **Withdraw Invitation** as shown in Figure 40.

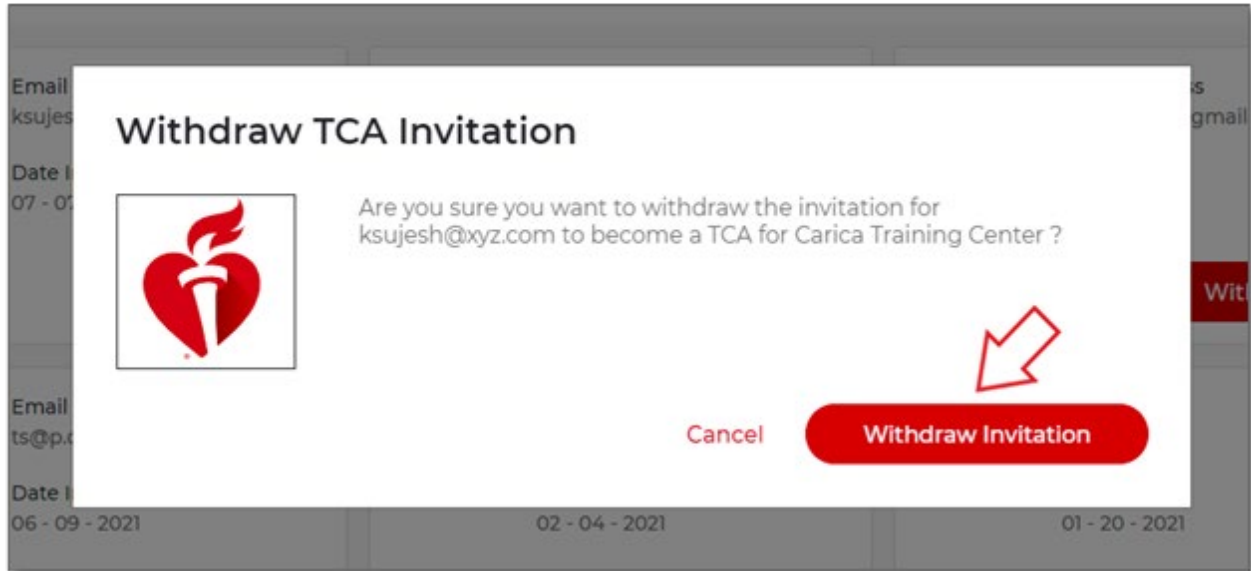


Figure 40. Withdraw Invite confirmation pop-up.

- After users select **Withdraw Invitation**, a success message appears on the **Training Center Administrators** page, as shown in Figure 41.

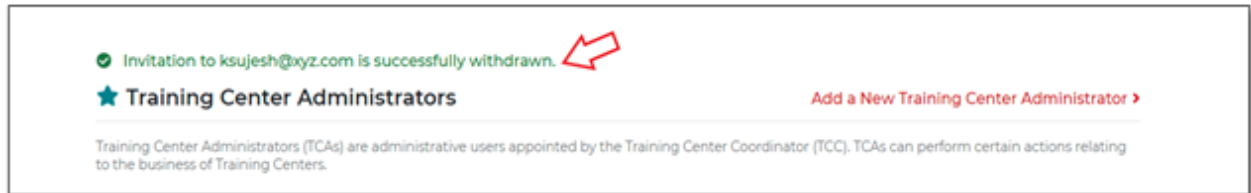


Figure 41. Invitation withdrawn success message.

- After selecting **Cancel** from the pop-up, users can go to the **Training Center Administrators** page.
- When an Organization withdraws an invite, the Request card disappears from the **Pending Requests** section.

6.1.5 Organization Dashboard: Tasks to Complete

- When a user from the Organization logs in, the accepted invite acknowledgment displays in the **Tasks to Complete** section of the user **Dashboard**, as highlighted in Figure 42.

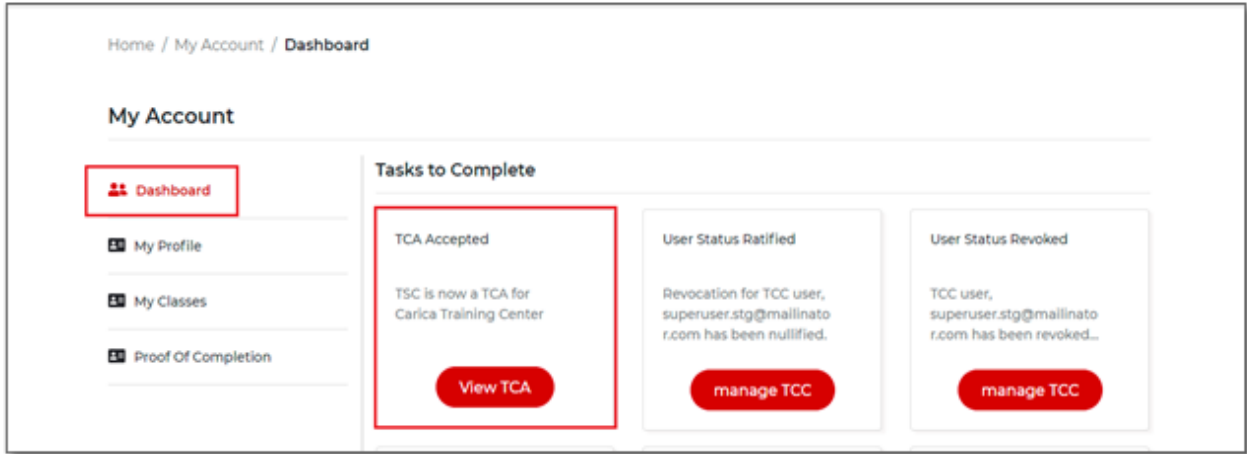


Figure 42. User Dashboard—Tasks to Complete section.

6.1.6 User Dashboard: Tasks to Complete

- When the user who received the request logs in, the incoming TCA alignment request card displays in the **Tasks to Complete** section of the user dashboard as highlighted in Figure 43.

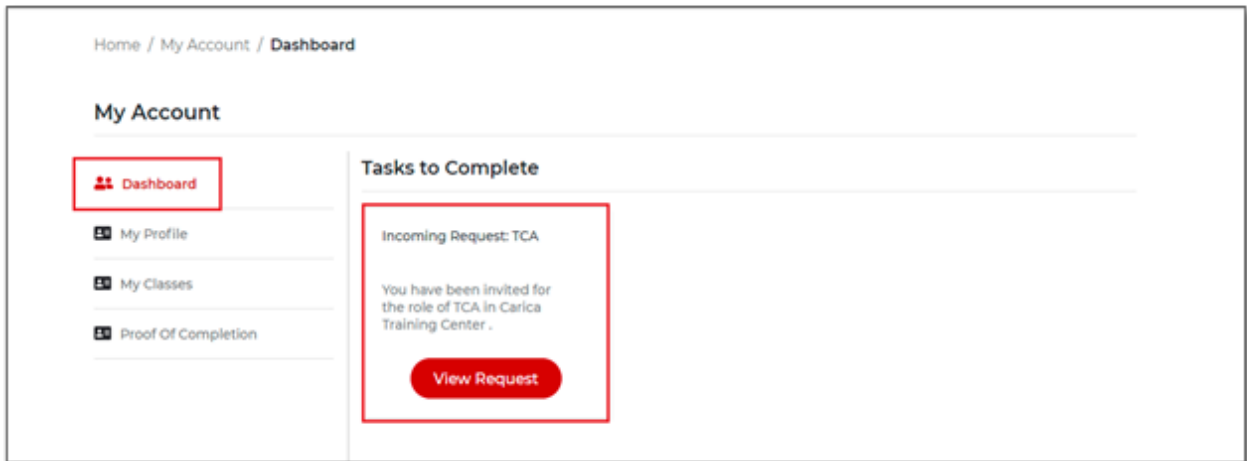


Figure 43. Tasks to Complete section—Incoming TCA Alignment Request.

- When users select **View Request** from the Request card, the pop-up in Figure 44 displays.



Figure 44. TCA Request confirmation pop-up.

- Users can accept or decline the incoming **TCA** alignment request by selecting **Accept** or **Decline** from this pop-up.

6.1.7 TCA List Filters

- The **Role** filter automatically selects **Training Center Administrator (TCA)**, as highlighted in Figure 45.

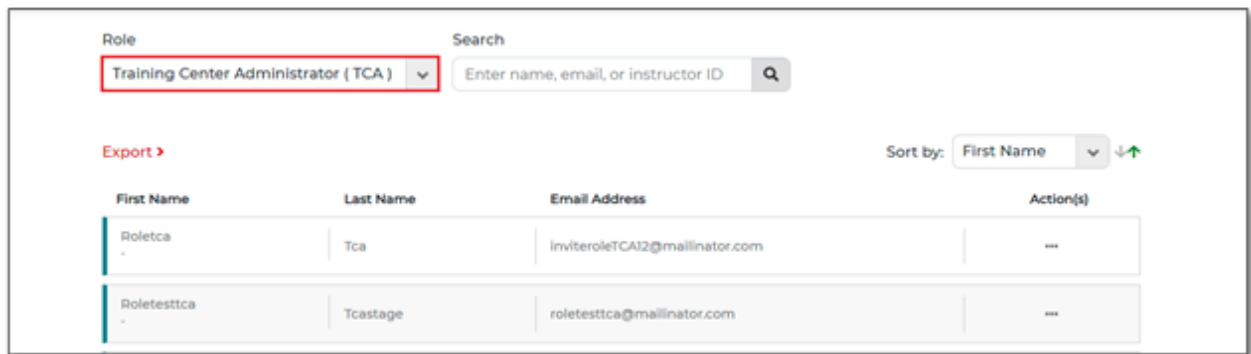


Figure 45. TCA list—Role Filter.

- Users can enter their name, email, or instructor ID in the **Search** field and display the **TCA** list accordingly, as shown in Figure 46.

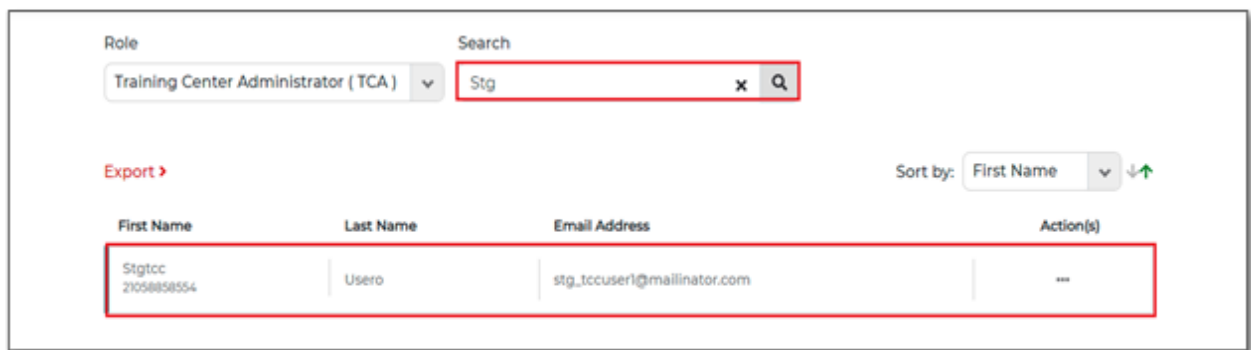


Figure 46. TCA list—Search text box.

Export and Sort By

- Users can export the **TCA** list by selecting the **Export** link, as highlighted in Figure 47.

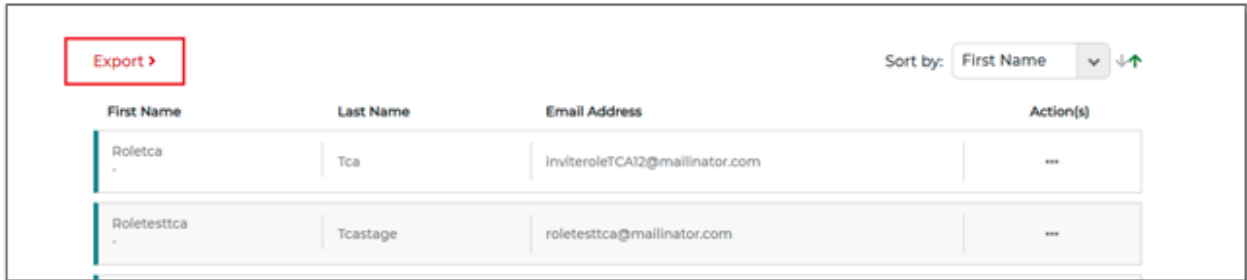


Figure 47. TCA list—Export link.

- The exported **TCA** list downloads as a CSV file.
- Users can sort the **TCA** list in the ascending or descending order by selecting **First Name** or **Last Name** from the **Sort by** drop-down, as highlighted in Figure 48.

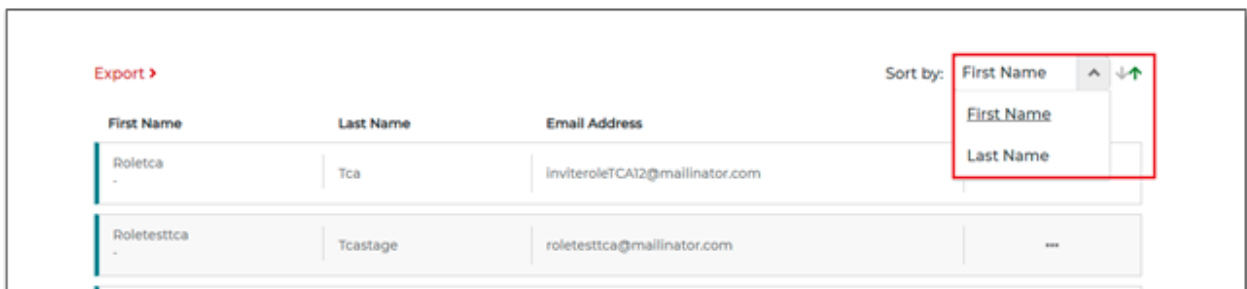


Figure 48. TCA list—Sort by drop-down options.

6.2 Manage TSC

TSCs can manage all the functionalities of a Training Site.

- Log in as a **TCC/TCA** user, as shown in Figure 49.



Figure 49. TCC Login.

- Select **Training Center** from the main navigation menu; from the drop-down, select **Coordinators** within the **Training Site**, as shown in Figure 50.



Figure 50. Training Center main navigation menu—Coordinators sub menu.

- The **Training Site Coordinators** page opens, displaying the **Pending Request(s)**, as shown in Figure 51.

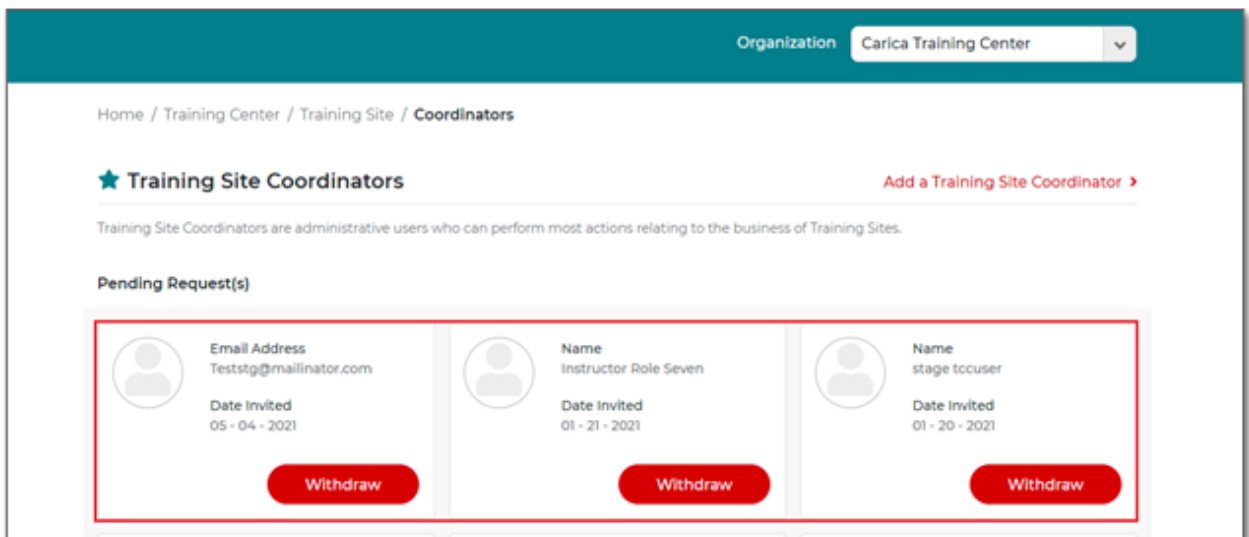


Figure 51. Training Site Coordinators page—Pending Requests.

- When users navigate through the **Pending Requests**, the **TSC** list displays, as highlighted in Figure 52.

First Name	Last Name	Email Address	Action(s)
James Tsc	User	james_tsc@mailinator.com	...
Motionpoint	User	motionpoint.user@mailinator.com	...
Tanuja 20126392784	Chunduri	tanuja.chunduri@laerdal.com	...
Tsc	Stage	tsc.stg@mailinator.com	...
Tsc-	Stage	tsc-stage@yopmail.com	...

Tscchris	Sigler	TSC_Chris.Sigler@mailinator.com	...
Tscjames	Newcome	TSC_james.newcome@mailinator.com	...

Figure 52. Training Site Coordinators list.

6.2.1 Actions: Permissions

- Select a record from the TSC list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Permissions** link, as shown in Figure 53.

First Name	Last Name	Email Address	Action(s)
James Tsc	User	james_tsc@mailinator.com	...
Motionpoint	User	motionpoint.user@mailinator.com	Delete Permissions

Figure 53. TSC list – Permissions link.

- Please refer to section **6.1.1** and follow the same steps.

6.2.2 Actions: Delete

- Select a record from the TSC list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Delete** link, as shown in Figure 54.

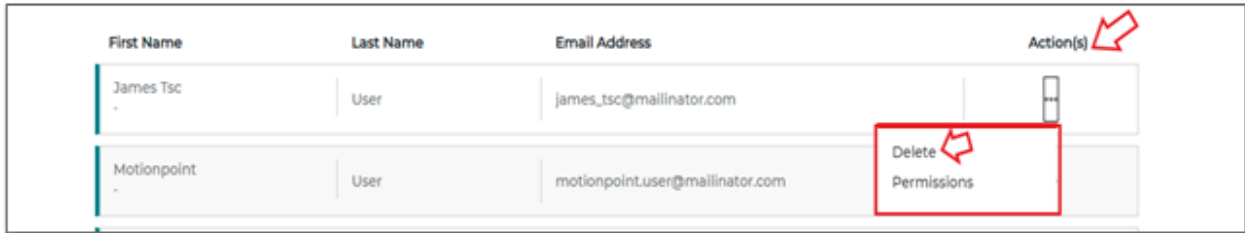


Figure 54. TSC list—Delete link.

- Refer to section 6.1.2 and follow the same steps.
- Users can view the **Pending Requests** and the **TSC** list of different organizations by selecting an option from the **Organization** drop-down in the top right corner, as highlighted in Figure 55.

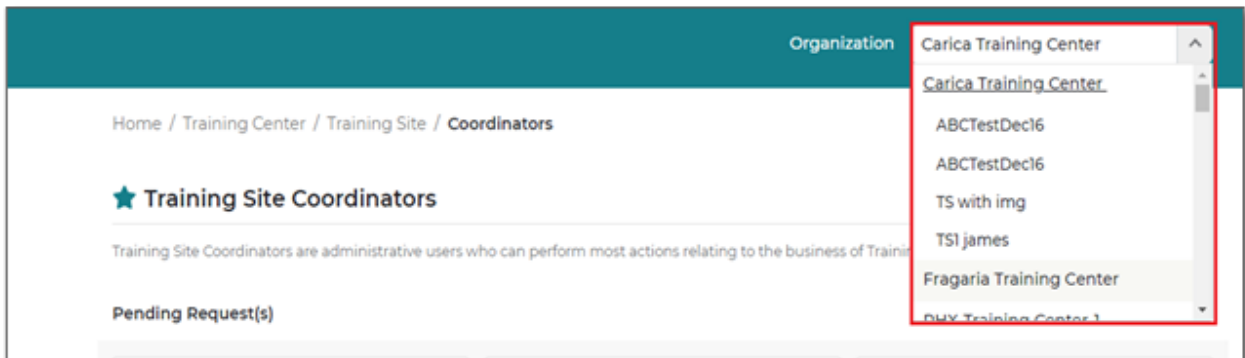


Figure 55. Organization drop down.

Note

- There can be only one **Training Site Coordinator (TSC)** for a training site.

6.2.3 Add a Training Site Coordinator

- Users can add a new TSC to the Training Site by selecting **Add a Training Site Coordinator** link on the top right corner, as highlighted in Figure 56.

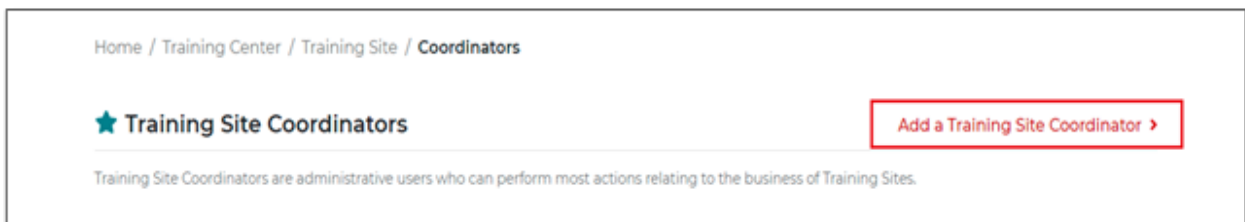


Figure 56. Training Site Coordinators page—Add a Training Site Coordinator link.

- **Add a Training Site Coordinator** page displays. Enter the **Email Address**, and select an organization from the **Training Site** drop-down, as highlighted in Figure 57.

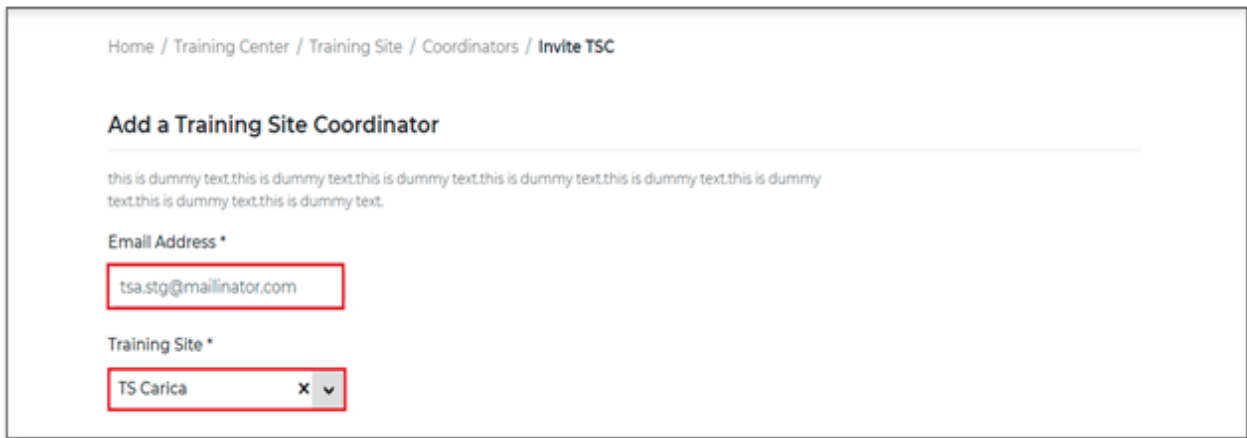


Figure 57. Add a TSC fields.

- Select the radio button **Default** from **Permissions**, and then select the **Send Invitation** button as shown in Figure 58.



Figure 58. Add a TSC – Setting Permissions and Send Invitation button.

- After selecting the radio button **Custom**, users can customize the **Read** or **Write** permissions and **Enable** or **Disable** permissions for the new **TSC** role's features.
- Refer to section **6.1.3** for **Manage Permissions** and follow the same steps.

6.2.4 Withdraw Invite

- Refer to section **6.1.4** and follow the same steps.

6.2.5 Organization Dashboard: Tasks to Complete

- Refer to section **6.1.5** and follow the same steps.

6.2.6 User Dashboard: Tasks to Complete

- Refer to section **6.1.6** and follow the same steps.

6.2.7 TSC List Filters

- The **Role** filter automatically selects **Training Site Coordinator (TSC)** as highlighted in Figure 59.

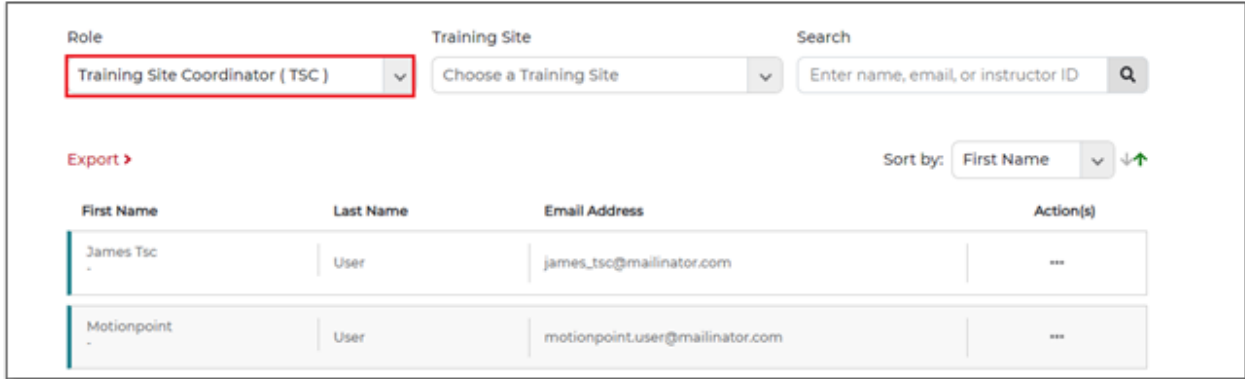


Figure 59. TSC list – Role filter.

- Users can select an option from the **Training Site** drop-down and display the TSC list accordingly, as highlighted in Figure 60.

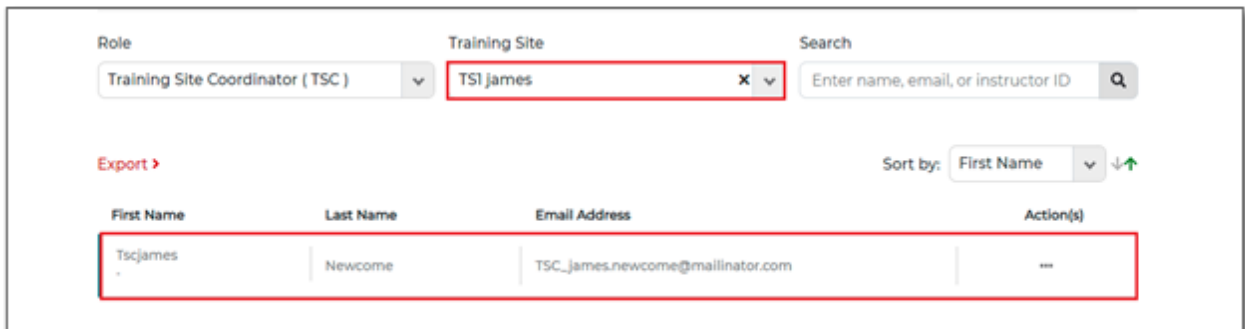


Figure 60. TSC list—Training Site filter.

- Users can enter the name, email, or instructor ID in the **Search** field and display the TSC list accordingly, as shown in Figure 61.

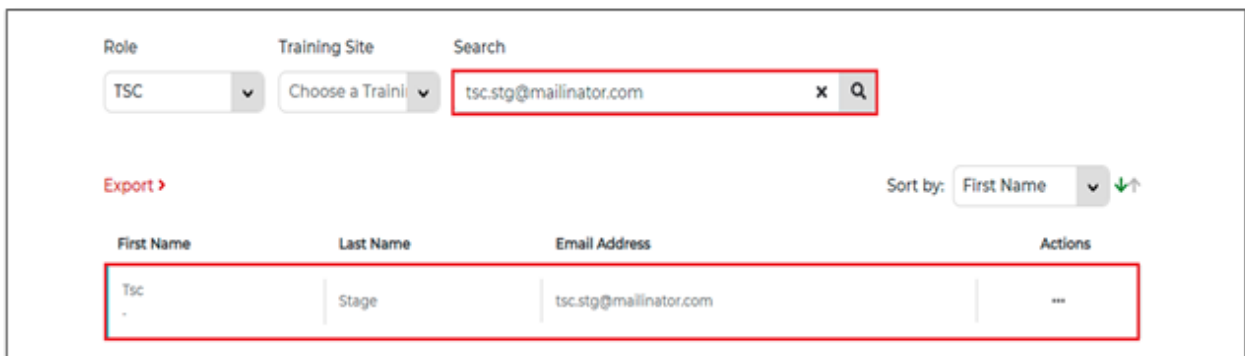


Figure 61. TSC list – Search text box.

Export and Sort By

- Users can export the TSC list by selecting the **Export** link, as highlighted in Figure 62.

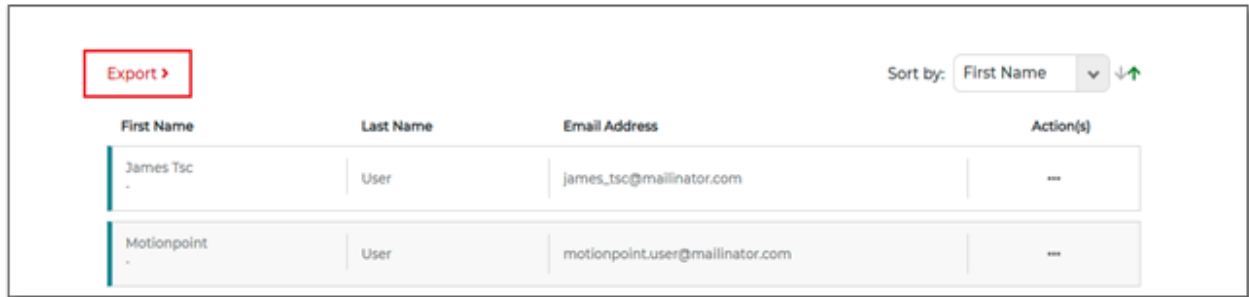


Figure 62. TSC list—Export link.

- The exported TSC list downloads as a CSV file.
- Users can sort the **TSC** list in ascending or descending order by selecting **First Name** or **Last Name** from the **Sort by** drop-down, as highlighted in Figure 63.

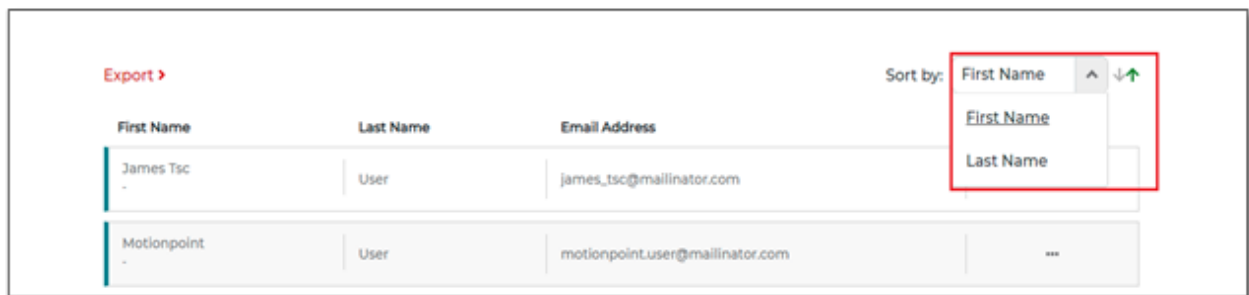


Figure 63. TSC list—Sort By drop-down options.

6.3 Manage TSA

Training Site Administrators have the same privileges as the TSC. They can administer all the functionalities of a Training Site.

- Log in as a **TCC/TCA/TSC** user, as shown in Figure 64.



Figure 64. Log in as a TCC/TCA/TSC.

- Select **Training Center** from the main navigation menu; from the drop-down, select **Admins** from **Training Site** as shown in Figure 65.



Figure 65. Training Center main navigation menu – Admins sub menu.

- The **Training Site Administrators** page opens, displaying the **Pending Requests** as shown in Figure 66.

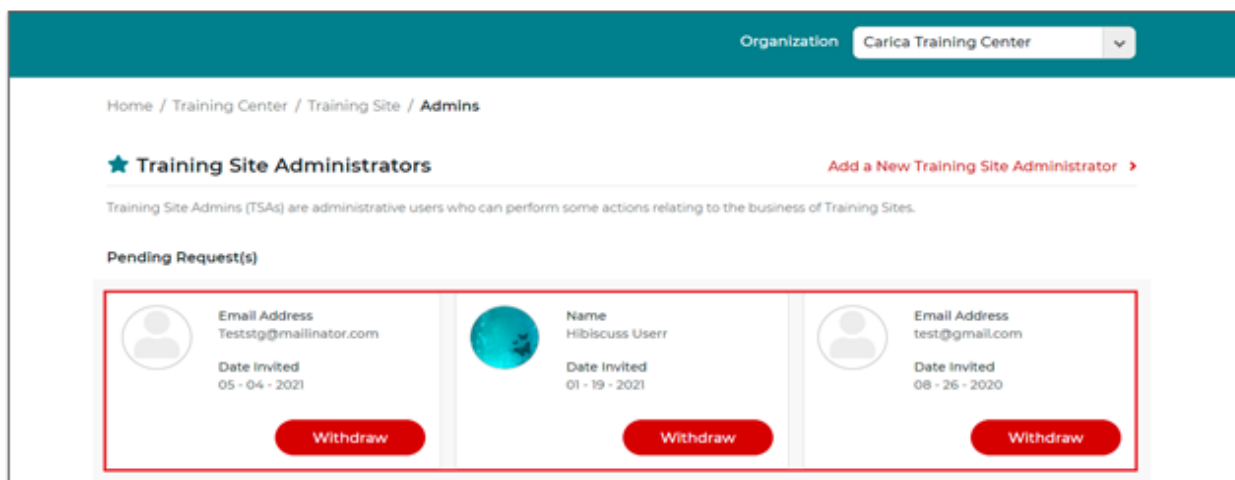


Figure 67. Training Site Administrators page—Pending Requests section.

- When users navigate through the **Pending Requests**, the **TSA** list displays, as highlighted in Figure 68.

First Name	Last Name	Email Address	Action(s)
Stgtcc 21058858554	Usero	stg_tccuser1@mailinator.com	...
Tanuja 20126392784	Chunduri	tanuja.chunduri@laerdal.com	...
Tsaanne -	Hudson	TSA_anne.hudson@mailinator.com	...

Showing 1 to 3 of 3 Results

Figure 68. Training Site Administrators list.

6.3.1 Actions: Permissions

- Select a record from the TSA list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Permissions** link, as shown in Figure 69.

First Name	Last Name	Email Address	Action(s)
Stgtcc 21058858554	Usero	stg_tccuser1@mailinator.com	...
Tanuja 20126392784	Chunduri	tanuja.chunduri@laerdal.com	...

Figure 69. TSA list – Permissions link.

- Refer to the section **6.1.1** for **Manage Permissions** and follow the same steps.

6.3.2 Actions: Delete

- Select a record from the TSA list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Delete** link as shown in Figure 70.



Figure 70. TSA list – Delete link.

- Refer to section 6.1.2 and follow the same steps.
- Users can view the **Pending Requests** and the **TSA** list for different organizations by selecting an option from the **Organization** drop-down on the top right corner, as highlighted in Figure 71.

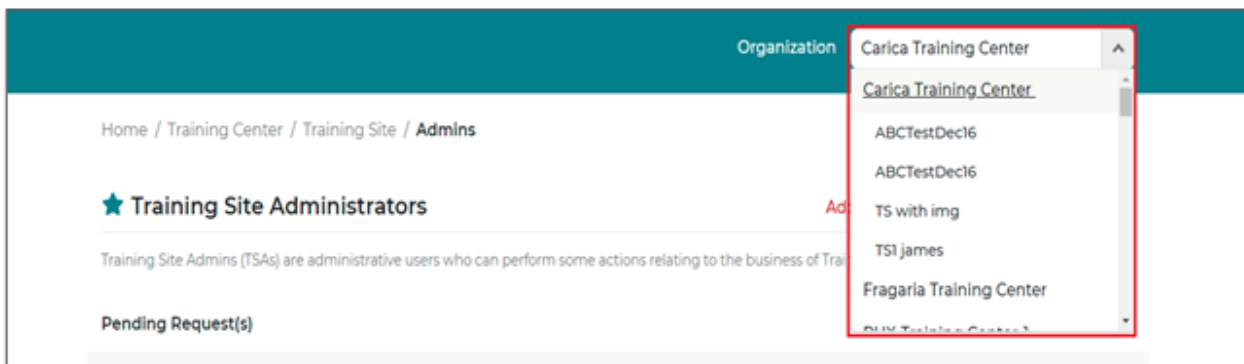


Figure 71. Organization drop-down.

Note

- There can be any number of **Training Site Administrators (TSA)** for a training site.

6.3.3 Add a New Training Site Administrator

- Users can add a new Training Site Administrator to the Training Site by selecting **Add a New Training Site Administrator** link in the top right corner, as highlighted in Figure 72.

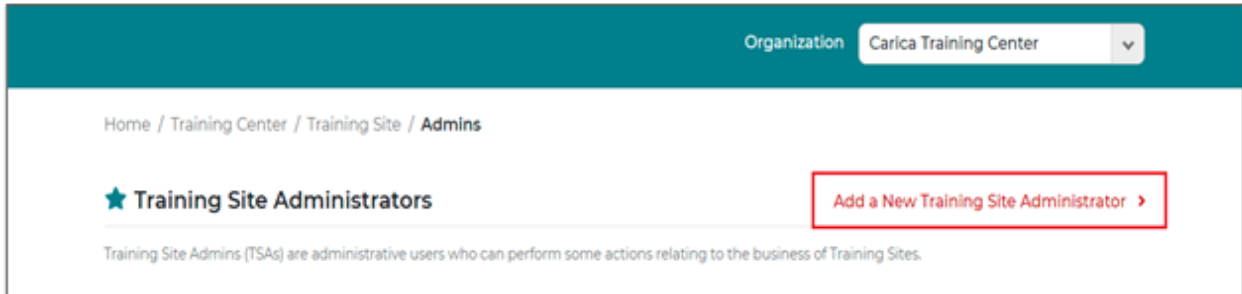


Figure 72. Training Site Administrators page—Add a New Training Site Administrator link.

- This user action displays **Add a Training Site Administrator** page. Enter the **Email Address**, select the **Training Site**, and select the radio button **Default** from **Permissions**, as shown in Figure 73.

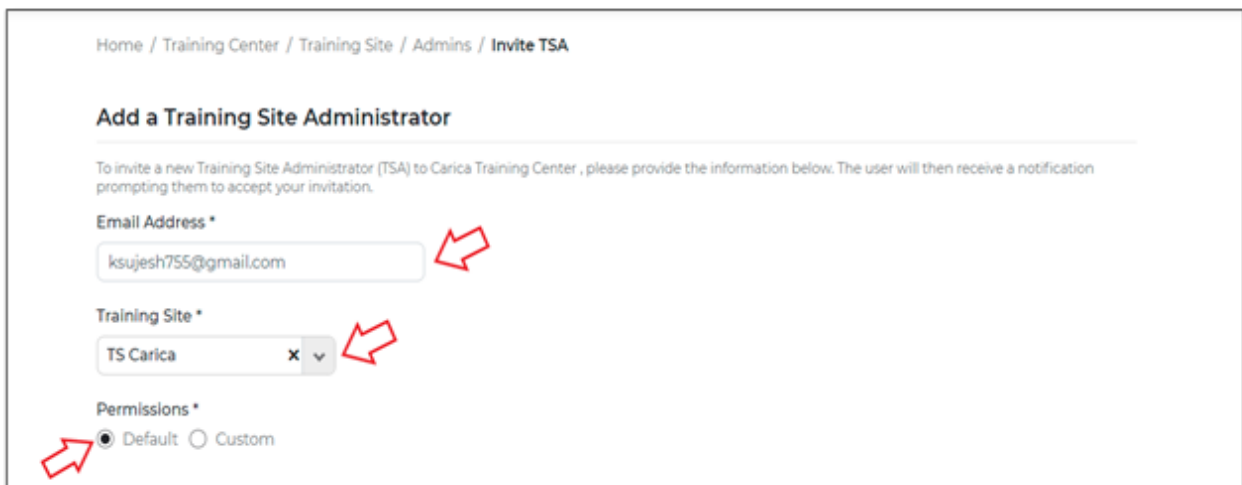
The screenshot shows the 'Add a Training Site Administrator' form. The breadcrumb trail is 'Home / Training Center / Training Site / Admins / Invite TSA'. The form title is 'Add a Training Site Administrator'. Below the title, there is a descriptive text: 'To invite a new Training Site Administrator (TSA) to Carica Training Center, please provide the information below. The user will then receive a notification prompting them to accept your invitation.' The form has three main sections: 'Email Address *' with a text input field containing 'ksujesh755@gmail.com'; 'Training Site *' with a dropdown menu showing 'TS Carica'; and 'Permissions *' with two radio buttons, 'Default' (selected) and 'Custom'. Red arrows point to each of these three fields.

Figure 73. Add a Training Site Administrator fields.

- Select the **Send Invitation** button, as shown in Figure 74.



Figure 74. Add a Training Site Administrator page—Send Invitation button.

- After selecting the radio button **Custom**, users can customize the **Read** or **Write** permissions and **Enable** or **Disable** Permissions for new **TSA** role's features.
- Refer to section **6.1.3** for **Manage Permissions** and follow the same steps.

6.3.4 Withdraw Invite

- Refer to section **6.1.4** and follow the same steps.

6.3.5 Organization Dashboard: Tasks to Complete

- Refer to section **6.1.5** and follow the same steps.

6.3.6 User Dashboard: Tasks to Complete

- Refer to section **6.1.6** and follow the same steps.

6.3.7 TSA List Filters

- The **Role** filter automatically selects **Training Site Administrator**, as highlighted in Figure 75.

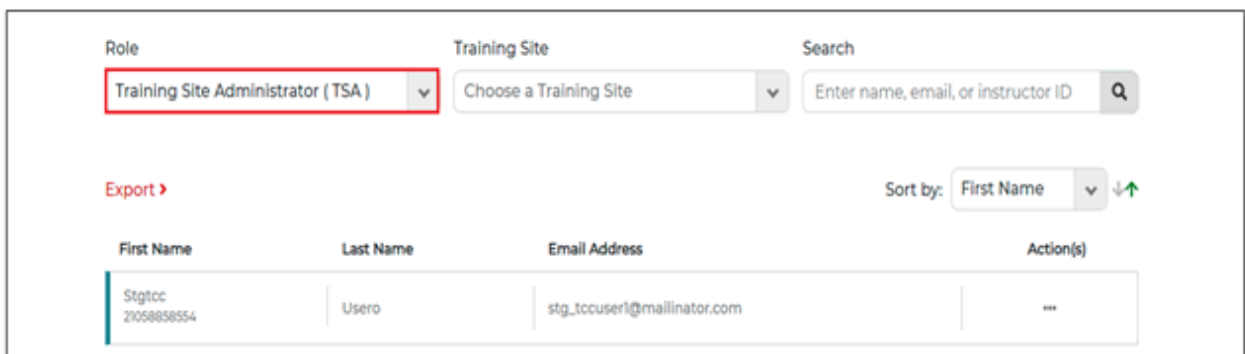


Figure 75. TSA list – Role filter.

- Users can select an option from the **Training Site** drop-down and display the TSA list accordingly, as shown in Figure 76.

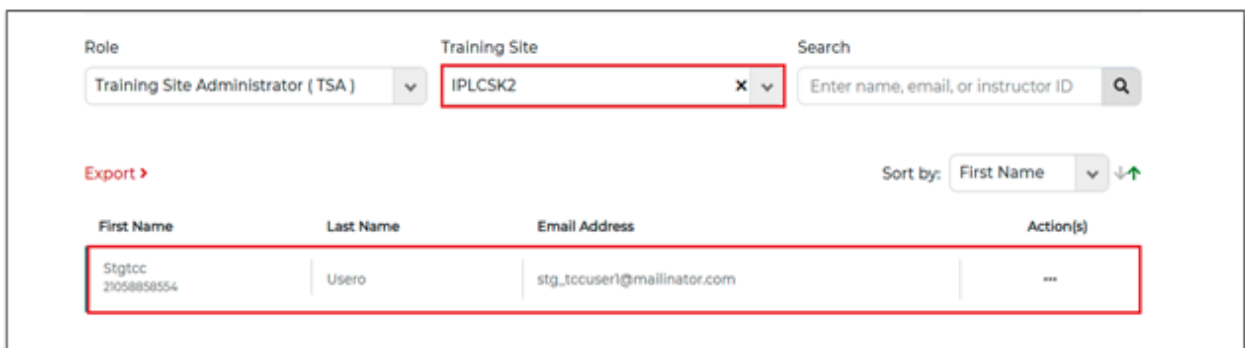


Figure 76. TSA list—Training Site filter.

- Users can enter the name, email, or instructor ID in the **Search** field and display the TSA accordingly, as shown in Figure 77.

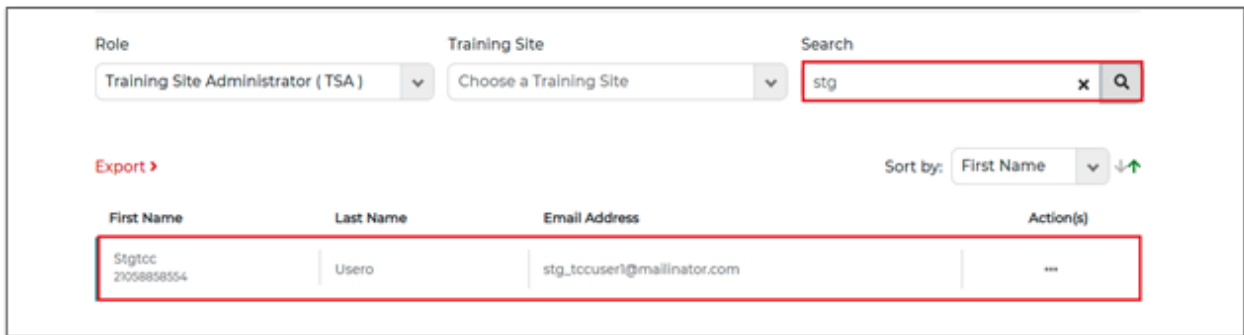


Figure 77. Display TSA—Search text box.

Export and Sort By

- Users can export the TSA list by selecting the **Export** link, as highlighted in Figure 78.



Figure 78. TSA list—Export link.

- The exported TSA list downloads as a CSV file.
- Users can sort the **TSA** list in the ascending or descending order by selecting **First Name** or **Last Name** from the **Sort by** drop-down, as highlighted in Figure 79.



Figure 79. TSA list—Sort by drop-down options.

6.4 Manage Faculty

Faculty members are higher ranking instructors who teach instructor training courses.

6.4.1 Manage Faculty: Training Center

- Log in as a **TCC/TCA** user as shown in Figure 80.



Figure 80. TCC/TCA Login.

- Select **Training Center** from the main navigation menu; from the drop-down, select **Faculty** as shown in Figure 81.

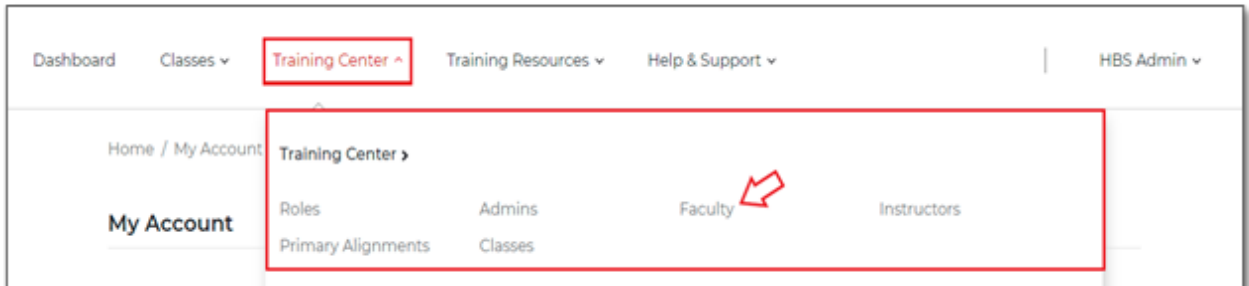
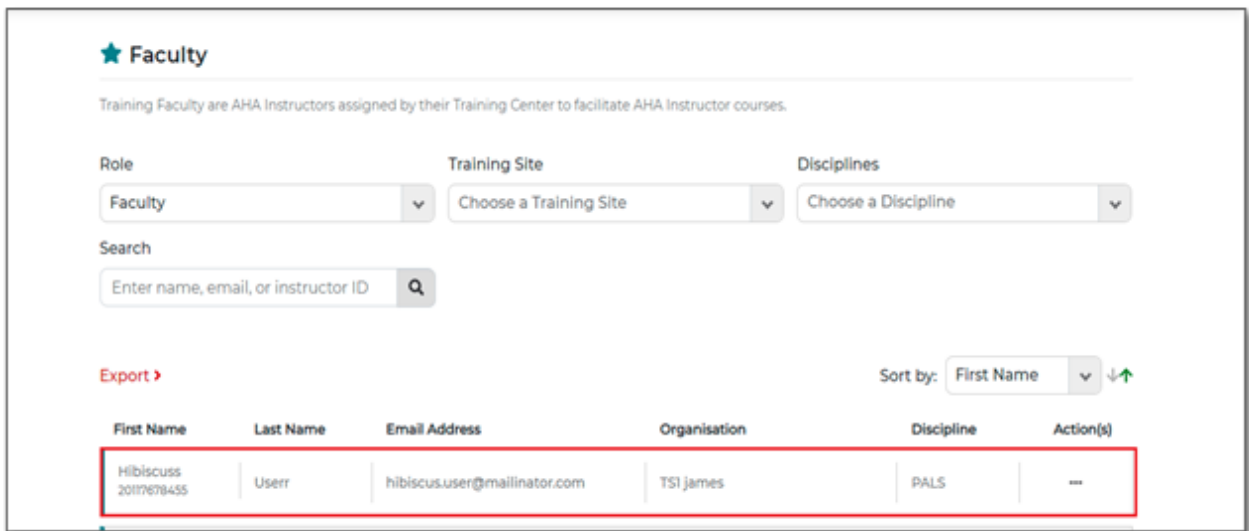


Figure 81. Training Center main navigation menu—Faculty sub menu.

- The **Faculty** page opens, displaying the **Faculty** list as highlighted in Figure 82.



Insjames 21016148060	Newcome	Ins_james.newcome@mailinator.com	Carica Training Center	PALS	...
Rohit 20105102717	Kulkarni	rohit.kulkarni@impelsys.com	Carica Training Center	HS	...
Stage 20125972666	Ins	stageins@mailinator.com	Test-12	BLS	...
Stg Ins 25019835451	Role	stg_inst@mailinator.com	Carica Ins Test TS	PALS	...

Figure 82. Faculty page—Faculty list.

- Users can view the **Faculty** list that belongs to different organizations by selecting an option from the **Organization** drop-down in the top right corner, as highlighted in Figure 83.

Organization: Carica Training Center

- Carica Training Center
- ABCTestDecl6
- ABCTestDecl6
- TS with img
- TSI james
- Fragaria Training Center

Figure 83. Organization drop down.

6.4.2 Faculty List Filters

- The **Role** filter automatically selects **Faculty**, as highlighted in Figure 84.

Role: Faculty

Training Site: Choose a Training Site

Disciplines: Choose a Discipline

Search: Enter name, email, or instructor ID

Export > Sort by: First Name

First Name	Last Name	Email Address	Organisation	Discipline	Action(s)
Hibiscuss 20117678455	Userr	hibiscus.user@mailinator.com	TSI james	PALS	...
Insjames 21016148060	Newcome	Ins_james.newcome@mailinator.com	Carica Training Center	PALS	...

Figure 84. Faculty list—Role filter.

- Users can select an option from the **Training Site** drop-down and display the **Faculty** list accordingly, as shown in Figure 85.

The screenshot shows the Faculty list interface. At the top, there are three filters: 'Role' set to 'Faculty', 'Training Site' set to 'Carica Ins Test TS' (highlighted with a red box), and 'Disciplines' set to 'Choose a Discipline'. Below the filters is a search bar with the placeholder text 'Enter name, email, or instructor ID' and a search icon. To the right of the search bar is an 'Export >' link and a 'Sort by: First Name' dropdown menu with up and down arrows. Below these elements is a table with the following columns: 'First Name', 'Last Name', 'Email Address', 'Organisation', 'Discipline', and 'Action(s)'. The first row of the table is highlighted with a red box and contains the following data: 'Stg Ins 25019835451', 'Role', 'stg_instl@mailinator.com', 'Carica Ins Test TS', 'PALS', and '...'. The 'Training Site' filter and the first row of the table are highlighted with red boxes.

Figure 85. Faculty list – Training Site filter.

- Users can select an option from the **Disciplines** drop-down and display the **Faculty** list accordingly, as shown in Figure 86.

The screenshot shows the Faculty list interface. At the top, there are three filters: 'Role' set to 'Faculty', 'Training Site' set to 'Choose a Training Site', and 'Disciplines' set to 'Basic Life S...' (highlighted with a red box). Below the filters is a search bar with the placeholder text 'Enter name, email, or instructor ID' and a search icon. To the right of the search bar is an 'Export >' link and a 'Sort by: First Name' dropdown menu with up and down arrows. Below these elements is a table with the following columns: 'First Name', 'Last Name', 'Email Address', 'Organisation', 'Discipline', and 'Action(s)'. The first row of the table is highlighted with a red box and contains the following data: 'Stage 20125972666', 'Ins', 'stageins@mailinator.com', 'Test-12', 'BLS', and '...'. The 'Disciplines' filter and the first row of the table are highlighted with red boxes.

Figure 86. Faculty list – Disciplines filter.

- Users can enter the name, email, or instructor ID in the **Search** field and display the **Faculty** accordingly, as shown in Figure 87.

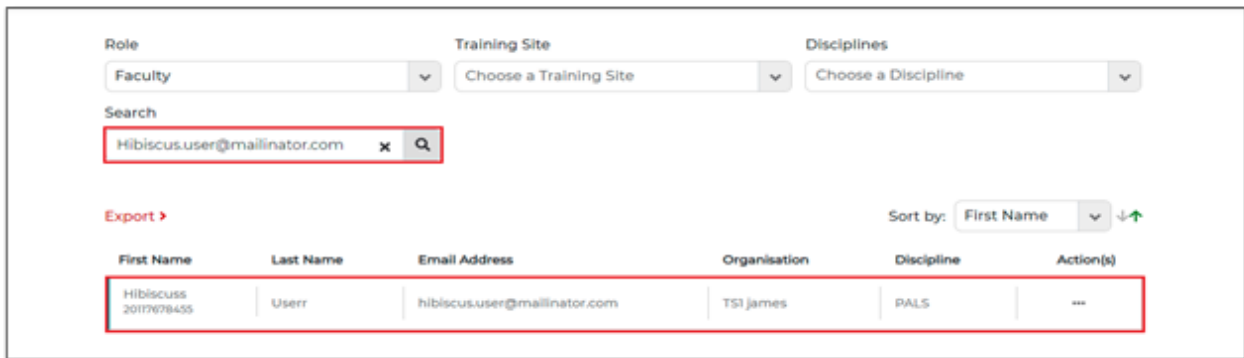


Figure 87. Display Faculty—Search text box.

Export and Sort By

- Users can export the **Faculty** list by selecting the **Export** link, as highlighted in Figure 88.



Figure 88. Faculty list—Export link.

- The exported **Faculty** list downloads as a CSV file.
- Users can sort the **Faculty** list in ascending or descending order by selecting **First Name** or **Last Name** from the **Sort by** drop-down, as highlighted in Figure 89.

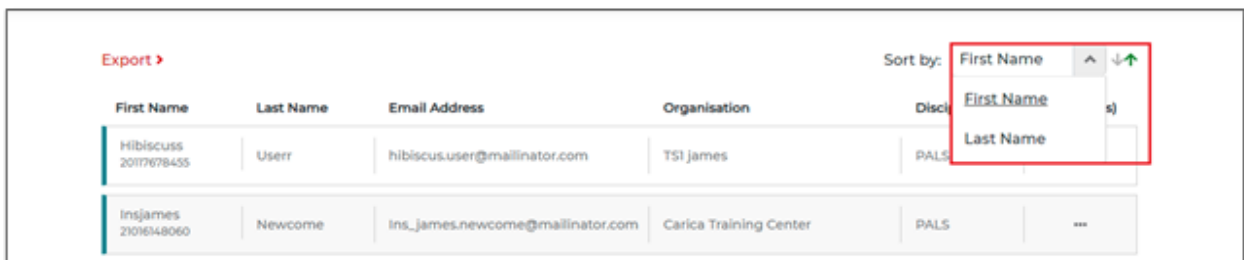


Figure 89. Faculty list—Sort by drop-down options.

6.4.3 Actions: Permissions

- Select a record from the Faculty list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Permissions** link, as shown in Figure 90.

First Name	Last Name	Email Address	Organisation	Discipline	Action(s)
Hibiscuss 2017678455	Userr	hibiscus.user@mailinator.com	TSI James	PALS	[Menu Icon]
Insjames 21016148060	Newcome	Ins_james.newcome@mailinator.com	Carica Training Center		

Figure 90. Faculty list – Permissions link.

- Refer to section 6.1.1 for **Manage Permissions** and follow the same steps.

6.4.4 Actions: Change to Instructor

- Select a record from the **Faculty** list, navigate to **Actions**, and select the 3 dots (...). From the pop-up box, select the **Change to Instructor** link, as shown in Figure 91.

First Name	Last Name	Email Address	Organisation	Discipline	Action(s)
Hibiscuss 2017678455	Userr	hibiscus.user@mailinator.com	ABCTestDec16	ACLS	[Menu Icon]
Hibiscuss 2017678455	Userr	hibiscus.user@mailinator.com	TSI James		

Figure 91. Faculty list—Change to Instructor link.

- This user action displays a pop-up prompting confirmation; select **Change** as shown in Figure 92.

Change Permissions

Are you sure that you want to change permissions for **Hibiscuss Userr** to Instructor for **ACLS**?

Cancel
Change

Figure 92. Change to Instructor confirmation pop-up.

- After users select **Change**, a success message appears on the **Faculty** page, as shown in Figure 93.

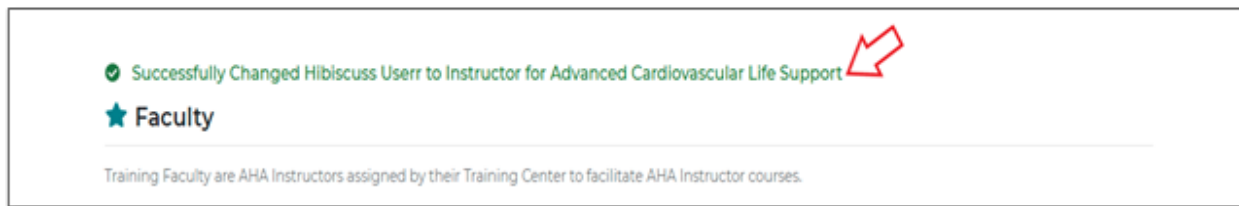


Figure 93. Changed to Instructor success message.

- After changing to **Instructor**, the demoted faculty member disappears from the Faculty list.

Note

Similarly, users can manage **Faculty** members belonging to **Training Site** by following these steps.

- Log in as a **TCC/TCA/TSC/TSA** user as shown in Figure 94.



Figure 94. TCC/TCA/TSC/TSA Log in.

- Select **Training Center** from the main navigation menu; from the drop-down, select **Faculty** from **Training Site** as shown in Figure 95.

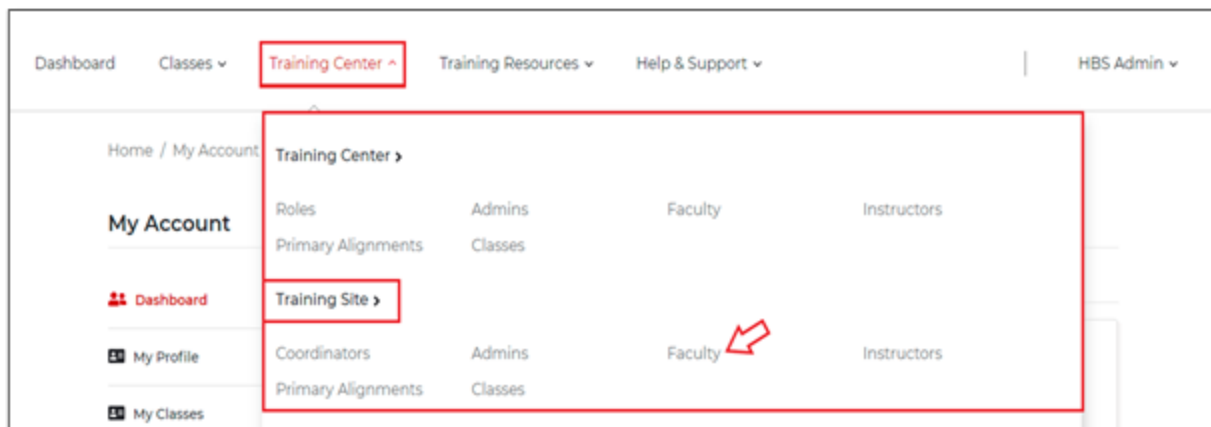


Figure 95. Training Center main navigation menu—Faculty sub menu.

- Refer to section 6.4.1 and follow the same steps.

- Log in as **Stg Ins role** (faculty) as highlighted in Figure 96.

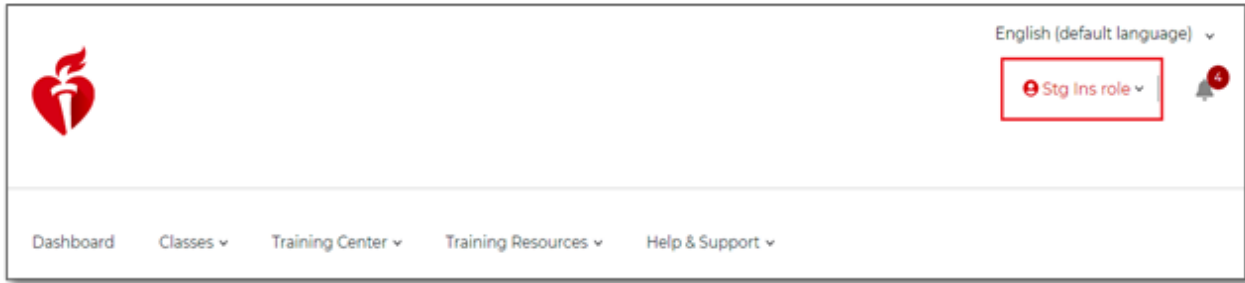


Figure 96. Stg Ins role (faculty).

- Select username (**Stg Ins role**), and from the drop-down, select **My Alignments** as highlighted in Figure 97.

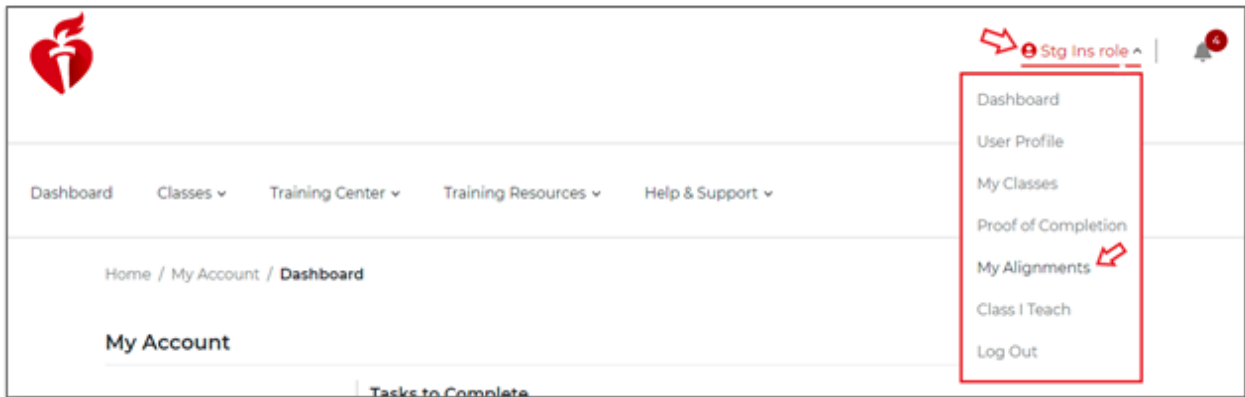


Figure 97. Stg Ins role drop-down—My Alignments.

- Alternatively, users can select **Training Center** from the main navigation menu and then select **My Alignments**, as highlighted in Figure 98.

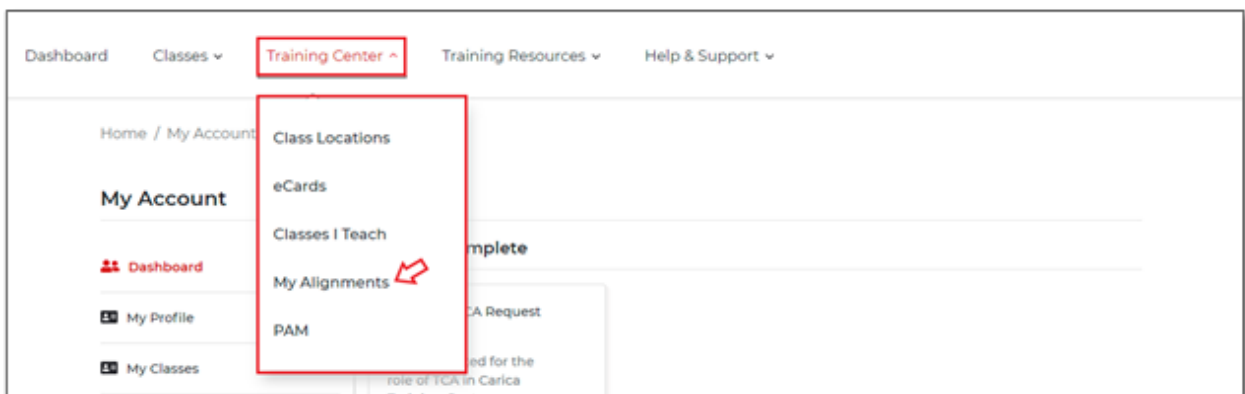


Figure 98. Training Center main navigation menu—My Alignments sub menu.

- The **My Alignments** page opens, displaying all the alignments the faculty is associated with, as highlighted in Figure 99.

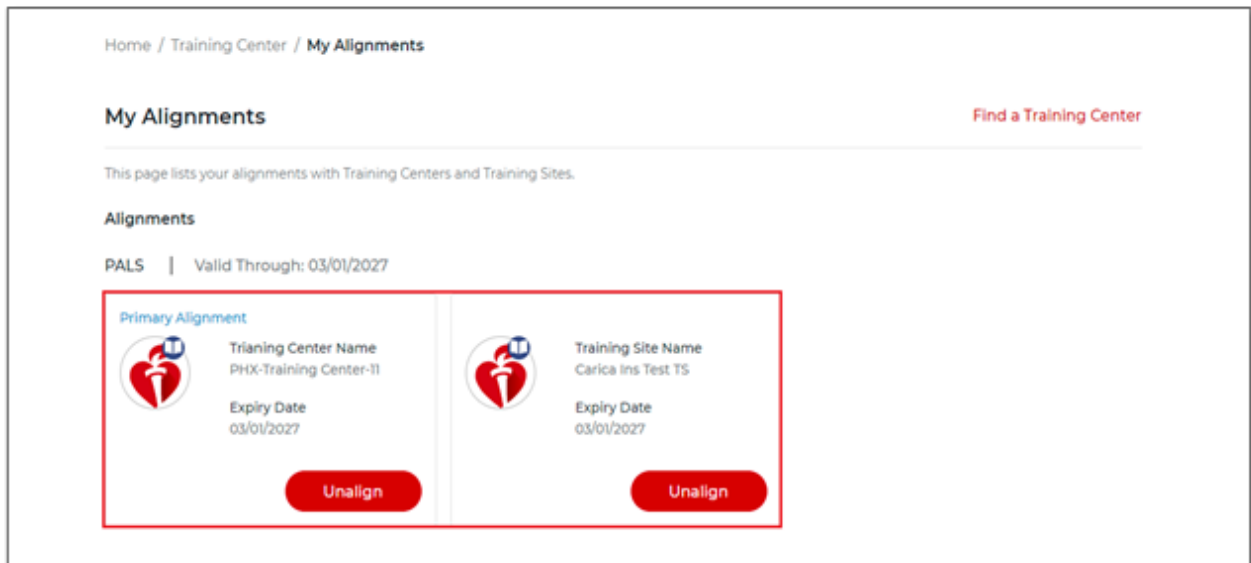


Figure 99. My Alignments page.

- Navigate and select **My Profile** from the Dashboard. The **Open Book** symbol on the profile image indicates the **Faculty badge** as shown in Figure 100.

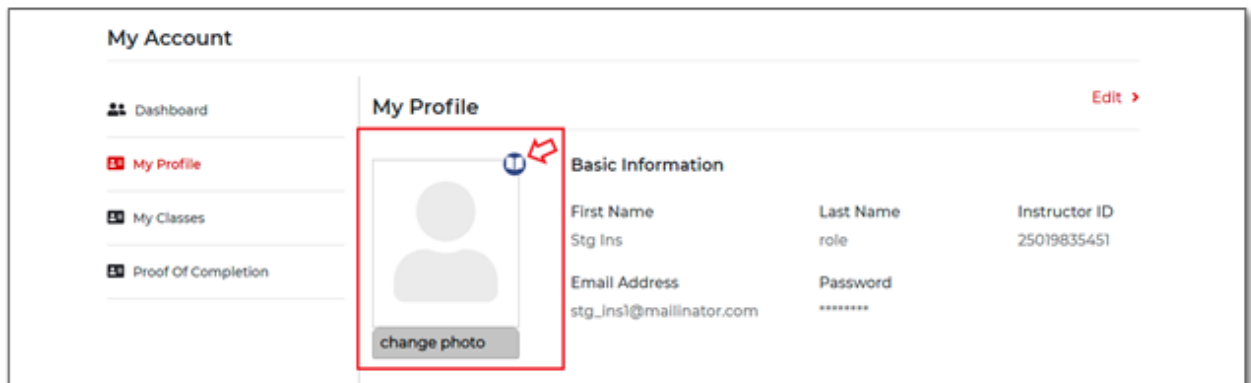


Figure 100. My Profile—Faculty badge.

- From the Dashboard, navigate below to the **Approved Disciplines** section. The badge indicates the user's role as a **Faculty** for those disciplines in an organization (TC/TS), as highlighted in Figure 101.

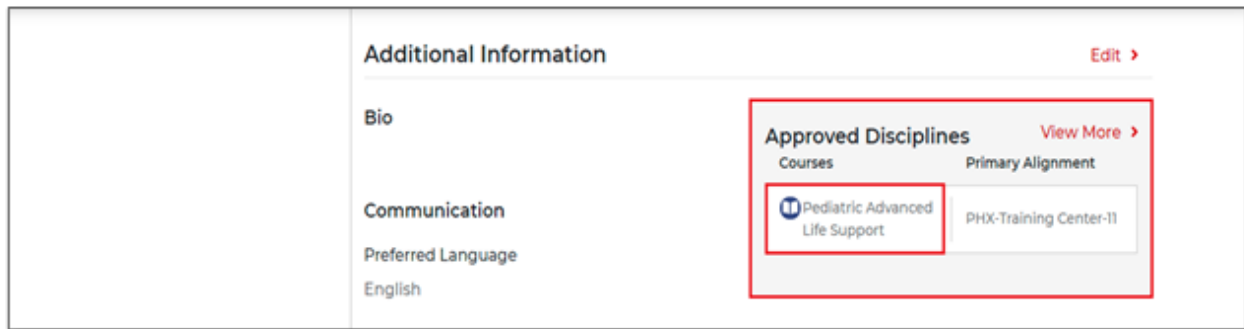


Figure 101. Approved Disciplines section – Faculty badge.

- The highlighted part in Figure 102 shows the user's recent association with **Carica Ins Test TS**, and the **badge** on the Training site image denotes the user's role as a **Faculty**.

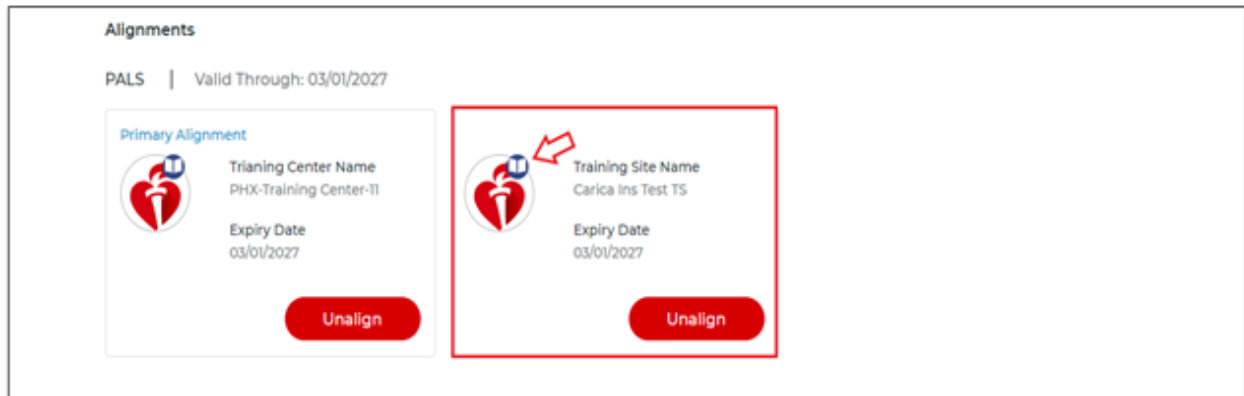


Figure 102. Alignments section- Training site image faculty badge.

6.5 Roles and Permissions

There are 2 levels of permissions defined in the Atlas platform; here are the roles that can set and customize these permissions:

- **Organization level Permissions:** Defined by the **TCC/TCA** of an organization and affects all the users across the organization.
- **User Level Permissions:** Defined by the **TCC/TCA/TSC/TSA** of an organization for the individual users.

6.5.1 Organization Level Permissions

- Select **Training Center** from the main navigation menu; from the drop-down, select **Roles** as shown in Figure 103.

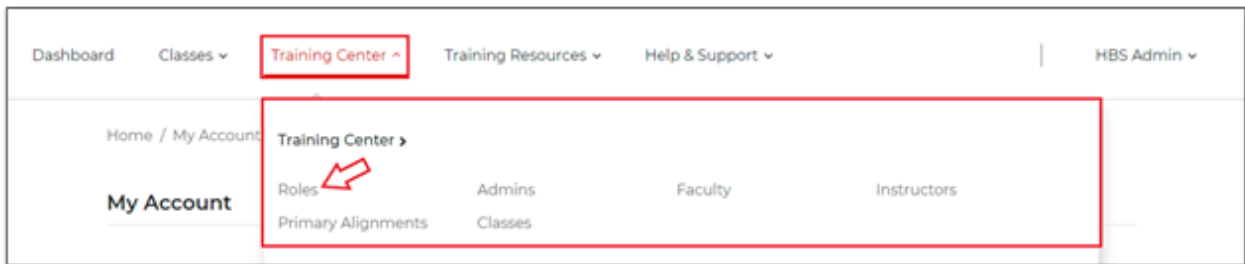
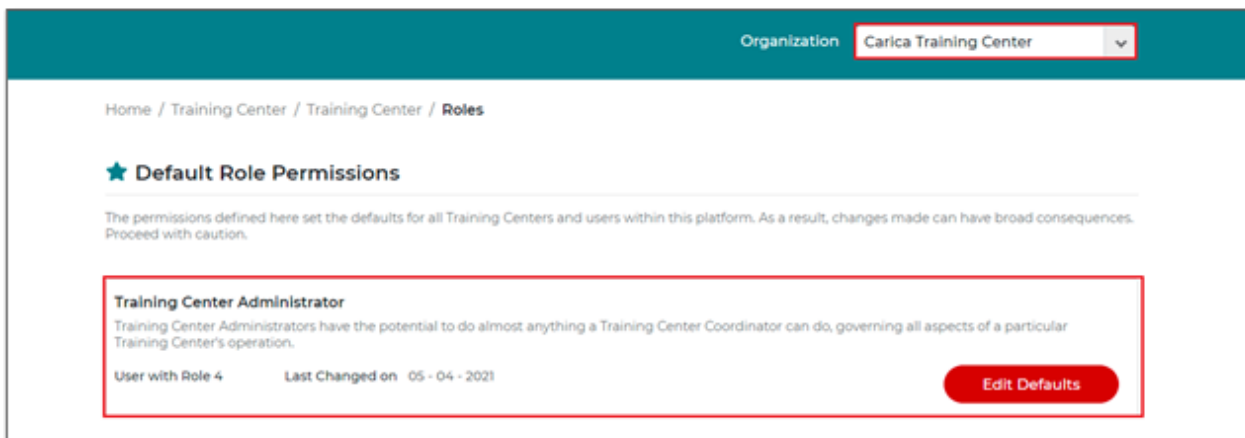


Figure 103. Training Center main navigation menu—Roles sub menu.

- The **Default Role Permissions** page opens, displaying all the roles in the organization; Figure 104 shows the **Carica Training Center**.



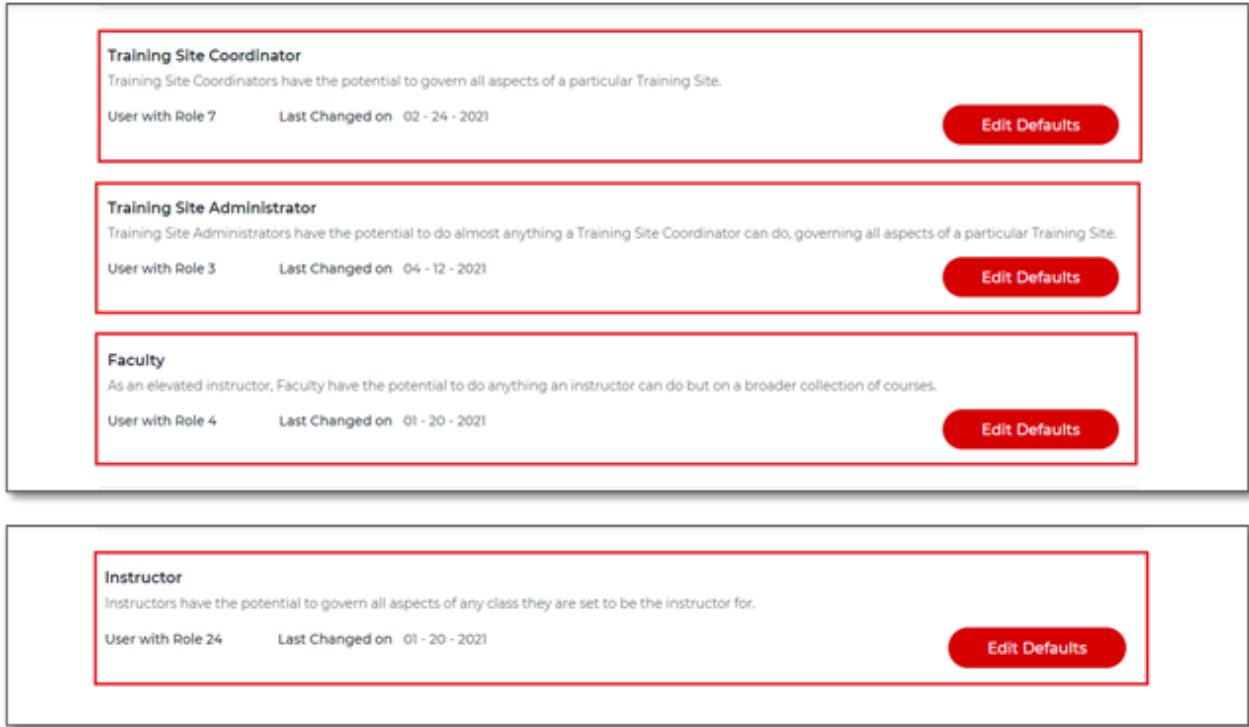


Figure 104. Default Role Permissions page—Role Details.

- Select the **Edit Defaults** button as shown in Figure 105.

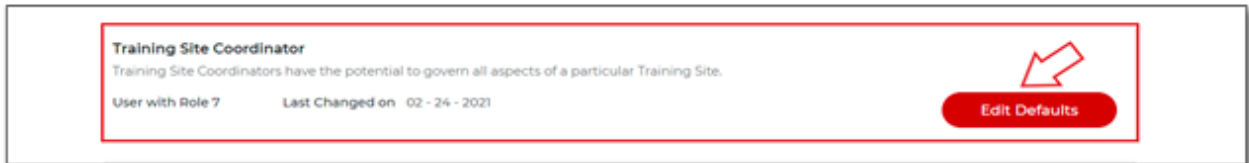


Figure 105. Edit Defaults button.

- When the **Default Permissions** page displays, users can change the Organization level **Read** or **Write** permissions and **Enable** or **Disable** permissions for features shown in Figure 106.

Home / Training Center / Training Center / Roles / Training Site Coordinator Permission

★ Default Permissions: Training Site Coordinator

The permissions defined here set the defaults for all Training Site Coordinators within this platform. As a result, changes made can have broad consequences. Proceed with caution.

Other Trainings	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Class Rosters	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Students	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Instructors and Alignments	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Training Site Coordinators	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Issue Exams for a Class	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Remediation	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
User Permissions	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Classes	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Class Locations	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Training Site Administrators	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Inventory Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Training Site Images	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Training Site Information	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Cancel

Figure 106. Default Permissions – TSC and Update button.

- Once the changes are done, select **Update** as shown in Figure 106.

- After users select **Update**, a success message appears on the **Default Role Permissions** page: **The default permissions for TSC have been updated successfully** (Figure 107).

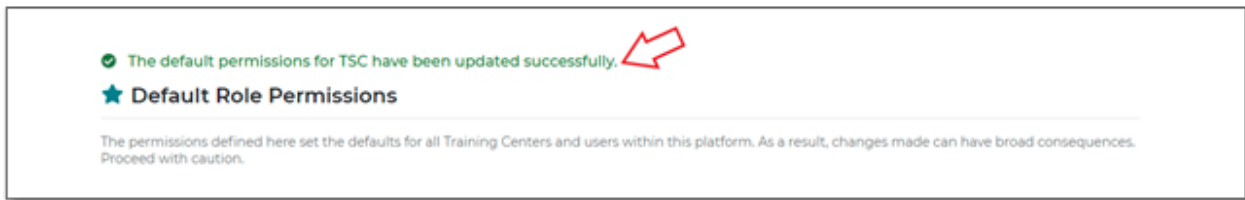


Figure 107. TSA default permissions update success message.

- If users want to restore the permissions to the Global Level, they should select **Reset to default** button, highlighted in Figure 108.



Figure 108. TSA permissions—Reset to default button.

- This user action displays a pop-up prompting confirmation to reset to default; select **Reset to Default** as shown in Figure 109.

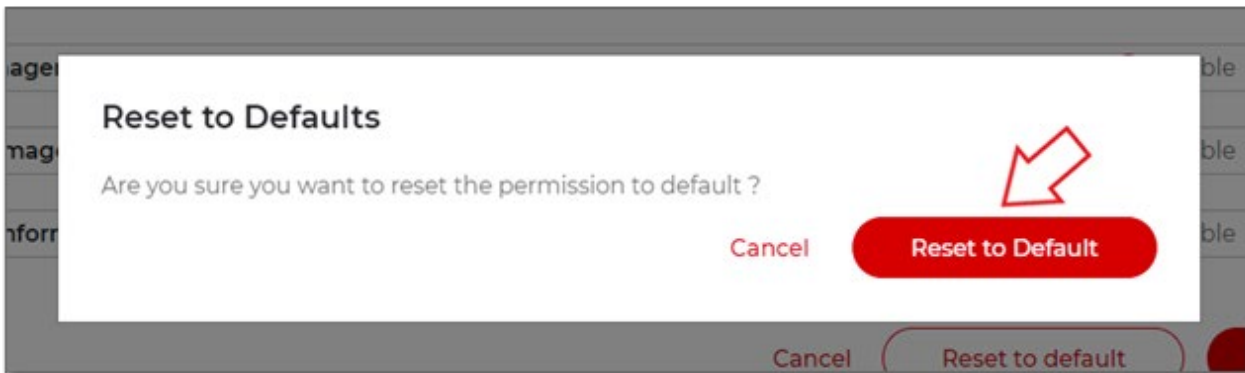


Figure 109. Reset to Defaults confirmation pop-up.

- After users select **Reset to Default**, a success message appears on the **Default Role Permissions** page, as shown in Figure 110.

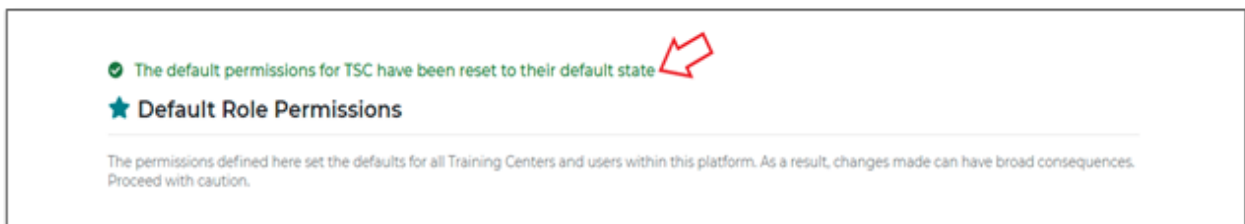


Figure 110. TSA role permissions reset to default success message.

6.5.2 User Level Permissions

- This content is covered in detail in sections **6.1.1** and **6.1.3**. Refer to those sections, and follow the steps for customizing the **User Level Permissions**.

Important Note

- Refer to the **Roles Matrix** spreadsheet, which details the set of features and the respective **Read** or **Write** permissions each role has access to.