



American
Heart
Association.

ATLAS USER MANUAL

Instructor 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 USA or outside of USA. Atlas is a reimagined solution that caters to the global market. This digital platform is available to the AHA Training Network, including Training Centers, Training 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 Coordinators (TCCs), Training Site Administrators (TSAs), Training Center Administrators (TCAs), and Training Site Coordinators (TSCs).

4 Abbreviations and Descriptions

Abbreviation	Description
AHA	American Heart Association
TCA	Training Center Administrator
TCC	Training Center Coordinator
TSA	Training Site Administrator
TSC	Training Site Coordinator

5 Instructor Management

Connecting an instructor to a Training Center or Training Site (for a specific discipline) in the system is accomplished with an alignment. Alignment requests, permissions, alignment management, and unalignment are all actions that can be taken to facilitate this.

5.1 Instructor Alignment

5.1.1 Understanding Alignment Requests

There are 2 types of instructor alignment requests:

- Outbound requests initiated by the Organization to the instructors
- Inbound requests coming from the instructor to the Organization

Outbound Instructor Alignment Request

- Once logged in, **TCA/TCC/TSC/TSA** roles may navigate to the **Instructors** page and then select the Training Center or Training Site from their **Organization** drop-down menu that they would like to use (Figure 1).

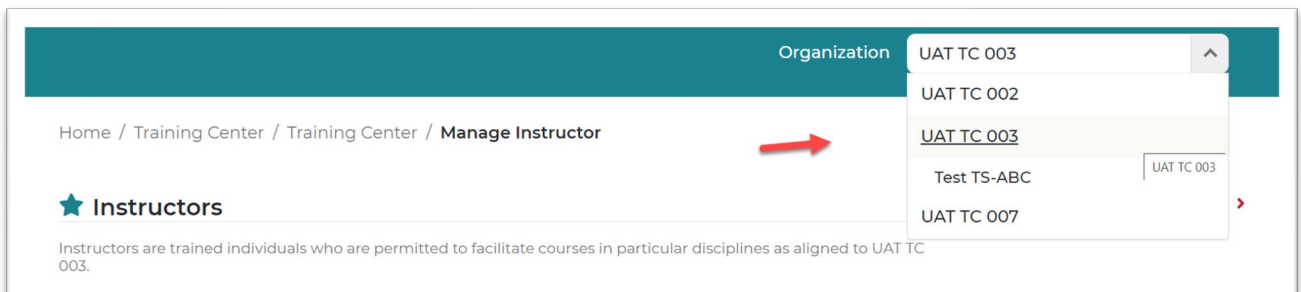


Figure 1. Organization switch.

- This action will display current **Pending Alignments** for the selected organization (Figure 2).

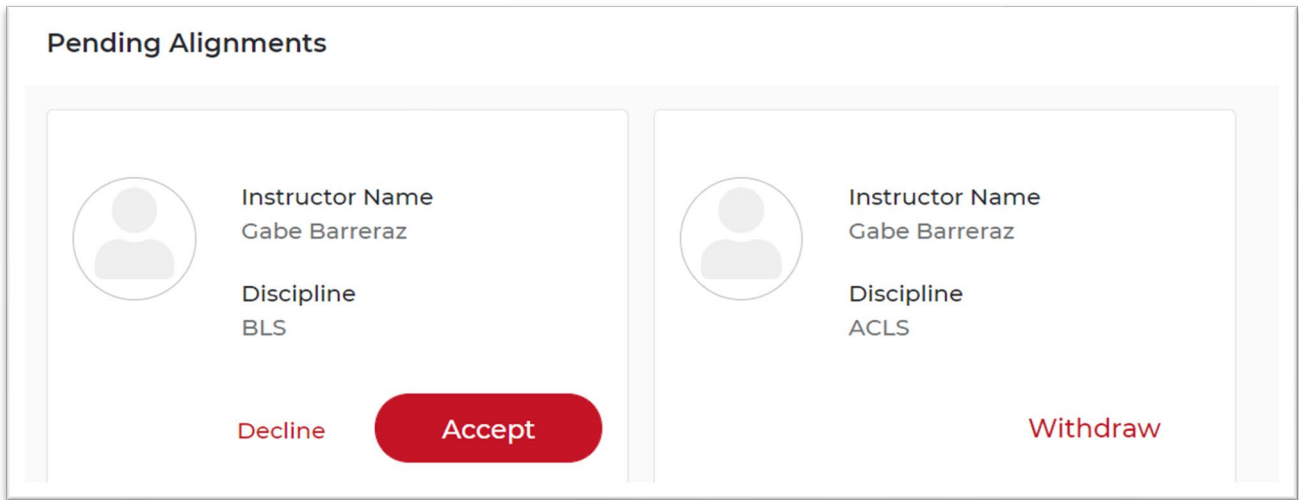


Figure 2. Pending Alignments page.

- An outbound request, from the organization to the instructor, displays as shown in Figure 3.

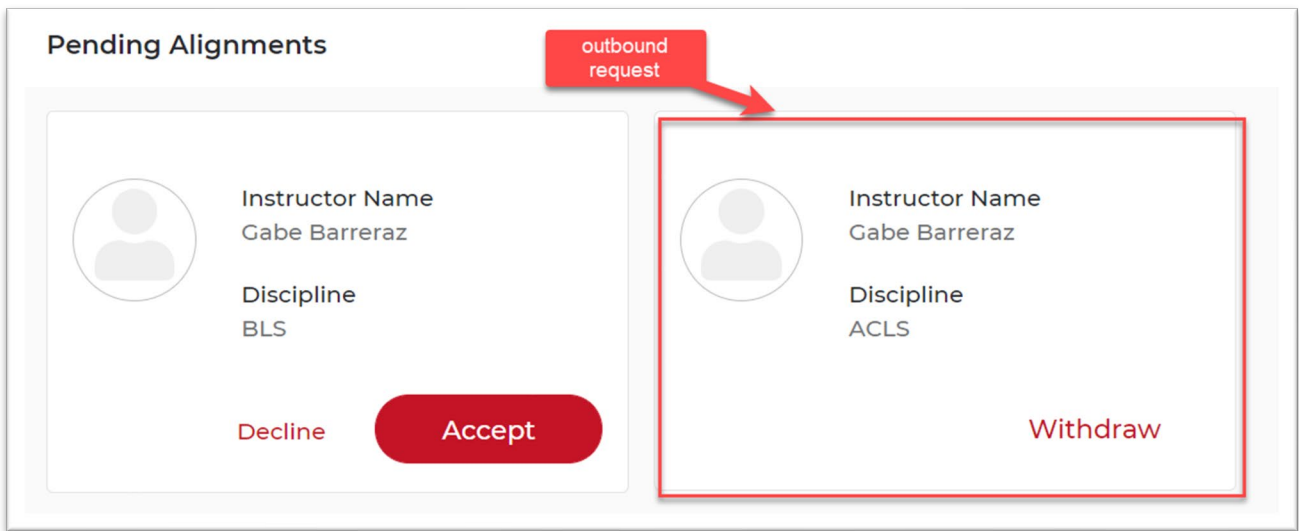


Figure 3. Outbound request.

- If the need arises for an existing instructor alignment to be withdrawn, the user may do so by selecting the **Withdraw** link (Figure 4).
- **TCA/TCC/TSC/TSA** roles can withdraw outbound requests to instructors; **TSC/TSA** roles can withdraw the requests pertaining to their site only.

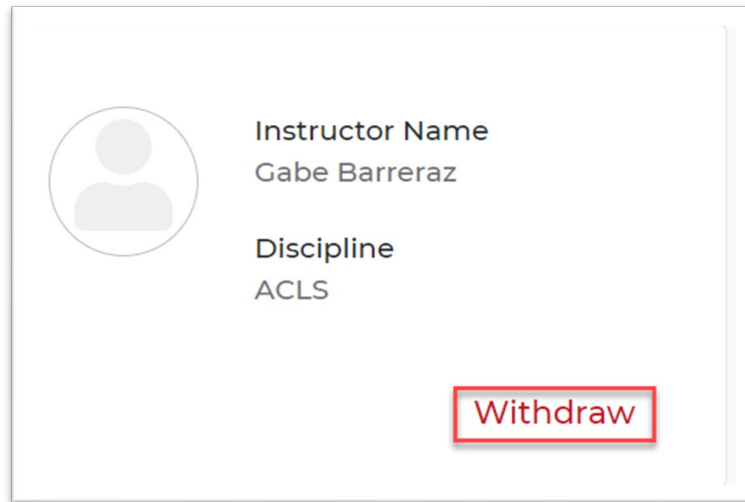


Figure 4. Link for instructors to withdraw.

- The user will be asked to confirm the withdrawal of the alignment invitation and must select **Withdraw** to complete the action (Figure 5).
- Selecting **Cancel** returns the user to the **Instructors** page and leaves the alignment request intact.

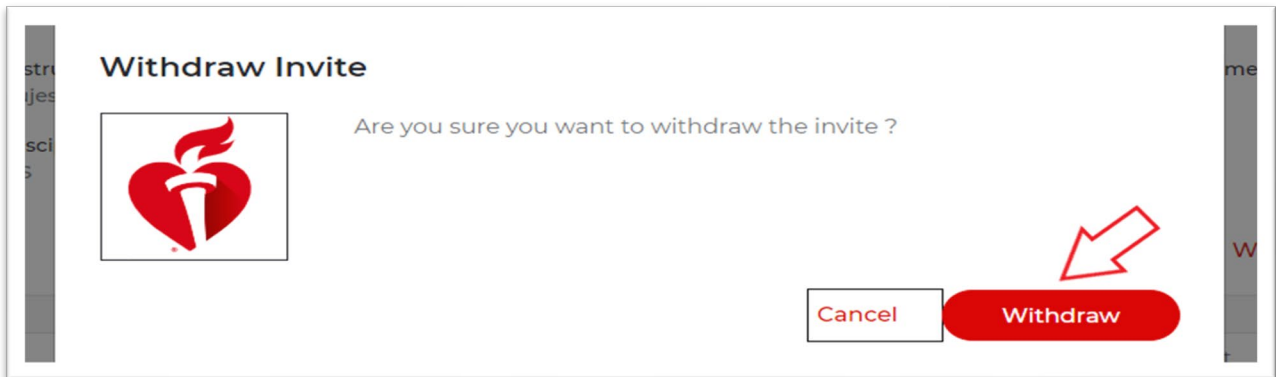


Figure 5. Instructors withdrawal confirmation pop-up.

- Once the action has been completed, the system will return the user to the **Instructors** page, where it will display a confirmation message (Figure 6).



Figure 6. Instructors withdrawal request success message.

Inbound Instructor Alignment Request

- **TCA/TCC/TSC/TSA** roles can approve the inbound requests from instructors; **TSC/TSA** roles can approve the requests pertaining to their site only. Inbound requests appear as shown in Figure 7.

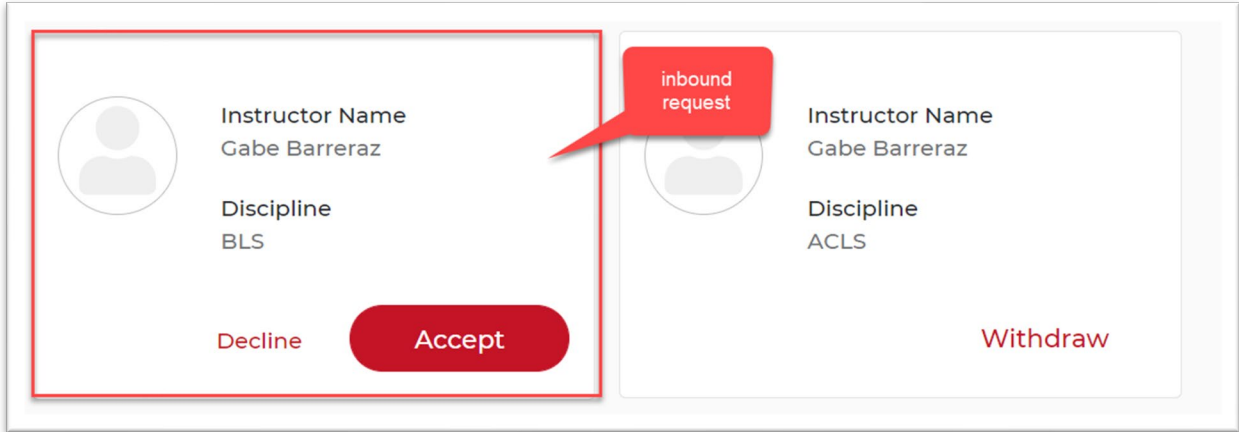


Figure 7. Pending inbound request.

- To accept an **Incoming Alignment Request**, the user may select the **Accept** button. The system will then display an approval page to capture additional details pertaining to the alignment, including the customization of **Expiry Date** and **Permissions** (Figure 8).

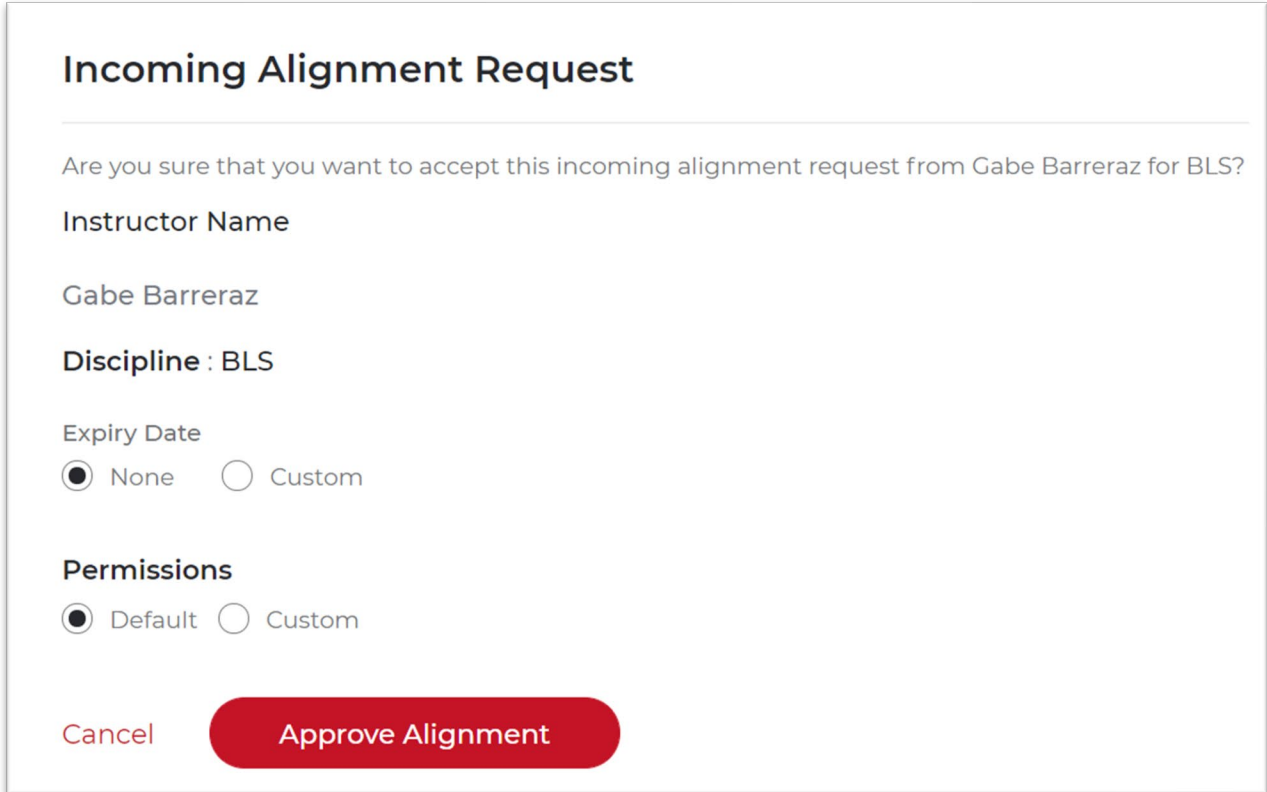


Figure 8. Incoming Alignment Request page.

5.1.2 Request an Instructor Alignment

Connecting an instructor to a Training Center or Training Site (for a specific discipline) in the system is accomplished with an **Alignment**. This section will lead you through the steps to send an alignment request to a potential instructor in the system.

- To align an instructor, select the **Align Instructor** link from the **Instructors** page (Figure 9).



Figure 9. Align Instructor link.

- The **Align an Instructor** page will then appear, allowing the user to search using either an **Instructor ID** or **email address** (Figure 10).

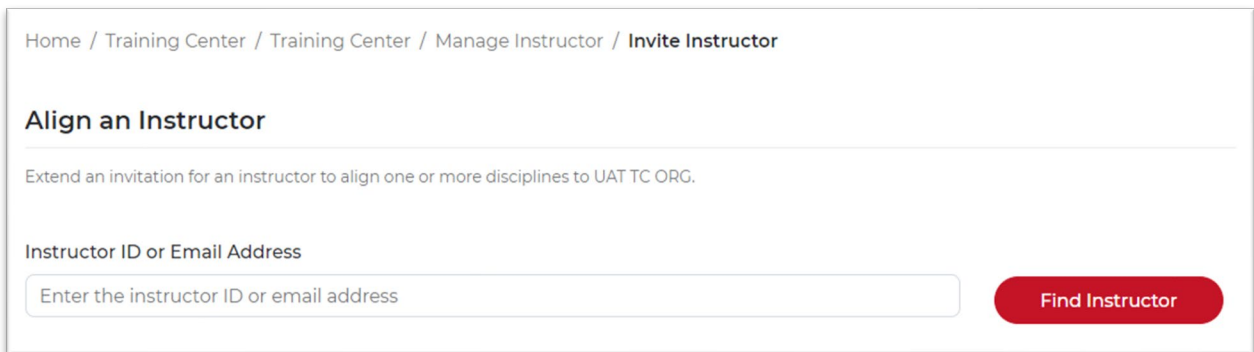


Figure 10. Align an Instructor page.

- If the Instructor ID or email address could not be found, the system will display an error message (Figure 11).

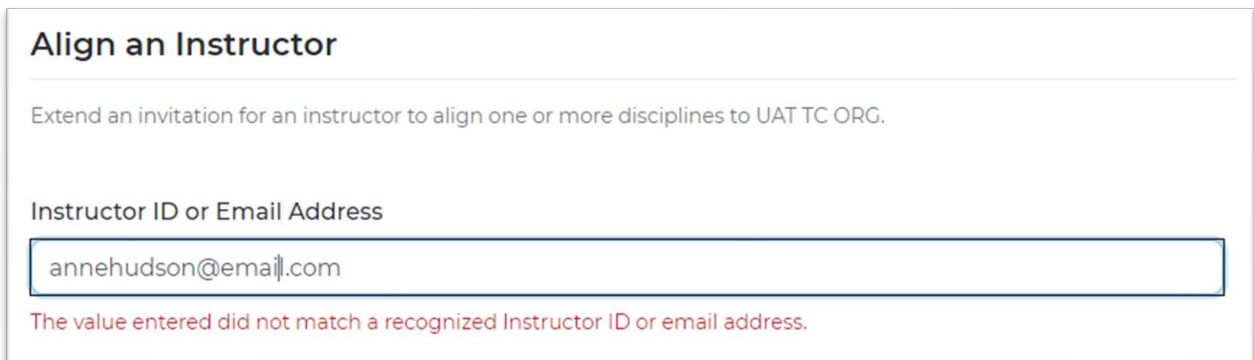


Figure 11. Align an Instructor error message.

- If the Instructor ID or email address can be found, the system will display the invitation detail fields needed to complete the request before sending (Figure 12).
- The user must select the applicable Training Center or Training Site that the alignment is being requested for, in addition to selecting the applicable **Disciplines**, determining **Alignment Expiration** (if any), and setting **Permissions**.

Align an Instructor

Extend an invitation for an instructor to align one or more disciplines to UAT TC ORG.

Email Address
anne.hudson@mailinator.com [Back](#)

Training Site
Choose a Training Site ▼

Disciplines

ACLS
Alignment Expiration
 None Specified Date

BLS

PALS

Permissions
 Default Custom

Invite Instructor

Figure 12. Align an Instructor invitation.

- The user may customize the **Alignment Expiration** for a specific discipline by selecting **Specified Date** and selecting the **calendar icon** (Figure 13).

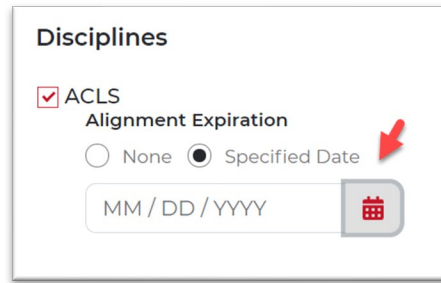


Figure 13. Alignment expiration date.

- The user may then set the date that they wish the alignment to expire on. The system will automatically unalign the instructor on the date selected, for the applicable discipline (Figure 14).

Note: The **Alignment Expiration** date typically only applies if the user wishes to have an instructor aligned on a temporary basis (for instance, a single class or a certain duration of time).

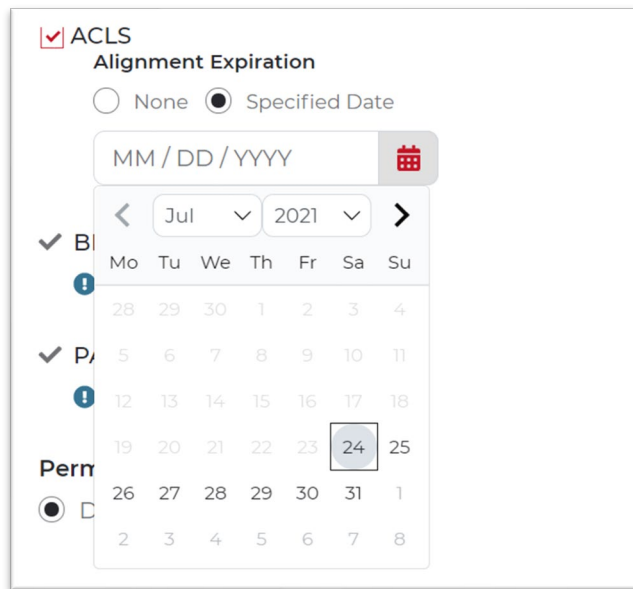


Figure 14. Instructor expiry date.

- The user may also choose either **Default** or **Custom Permissions** before sending the invitation (Figure 15).
 - **Default Permissions** are a generic permission set attributed to instructors, which facilitate the specific actions they must take in the system for their role.
 - **Custom Permissions** allow the user to determine what actions they would like the instructor to be able to take in the system and allow them accordingly.

Permissions
 Default Custom

Roster Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Student Management	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Write
Issue Exam	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Remediation	<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 type="checkbox"/> Write
Inventory Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Figure 15. Instructor permission.

- Once all invitation details have been set, the user may select the **Invite Instructor** button at the bottom of the form to send the **Alignment Request** (Figure 16).

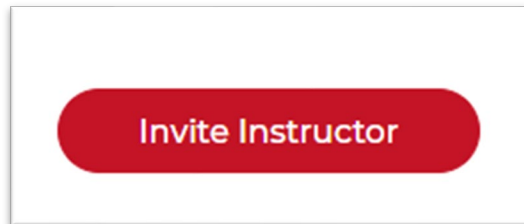


Figure 16. Invite Instructor button.

- Upon successful completion of the alignment request, the user will be returned to the **Instructors** page to see a confirmation message of success (Figure 17).

Home / Training Center / Training Center / **Manage Instructor**

anne hudson was successfully invited to align for Advanced Cardiovascular Life Support.

★ **Instructors** [Align Instructor >](#)

Instructors are trained individuals who are permitted to facilitate courses in particular disciplines as aligned to UAT TC ORG.

Figure 17. Invite Instructor confirmation message.

5.1.3 Unalign Instructor

The act of disconnecting an instructor from a Training Center or Training Site (for a specific discipline) in the system is called *unalignment*. This section will lead you through the steps to unalign an existing instructor in the system.

- From the **Instructors** page, the user should navigate to the Instructors list and locate the record for the instructor that they would like to unalign. Next, the user should select the 3 dots (...) in the **Actions** column. Then, from the pop-up box, the user should select **Unalign** (Figure 18).

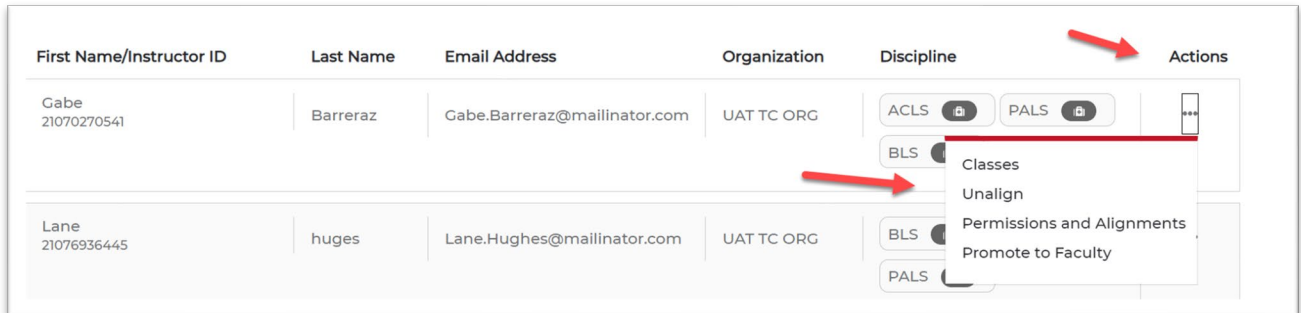


Figure 18. Unalign link.

For Instructors With Multiple Discipline Alignments

- If an existing instructor is aligned to more than one discipline, the list of disciplines will appear in a pop-up. The user may use the checkboxes to indicate which disciplines are to be removed as alignments for the instructor (Figure 19).

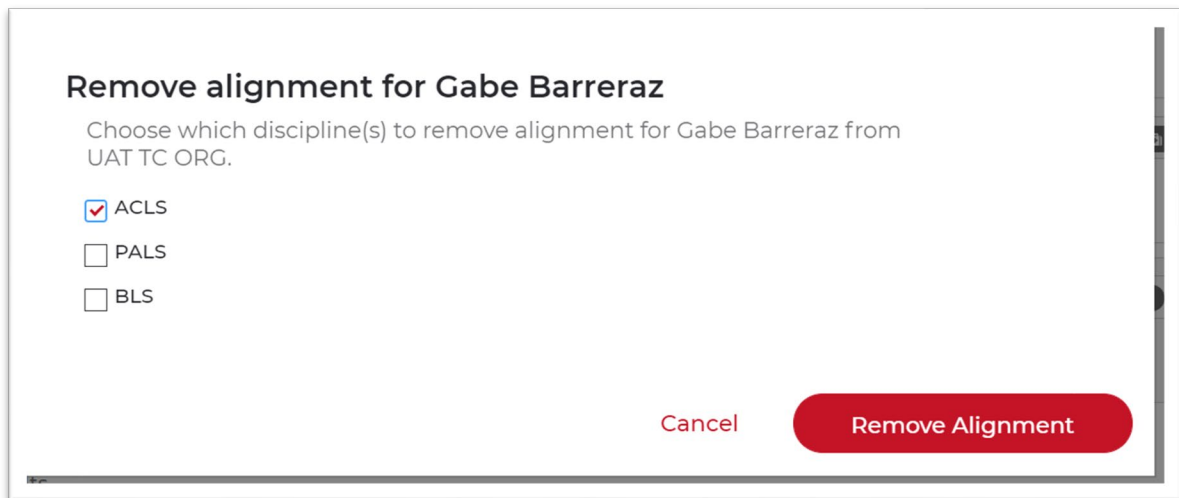


Figure 19. Discipline Unalign list.

- Selecting **Cancel** returns the user to the **Instructors** page and cancels the action.
- Selecting the **Remove Alignment** button automatically results in the instructor being unaligned for the disciplines selected.
 - Currently, there is no confirmation message that appears after the Remove Alignment button is clicked. The unalignment happens immediately.
- The unaligned discipline is shown in the instructor record with a strikethrough (Figure 20).

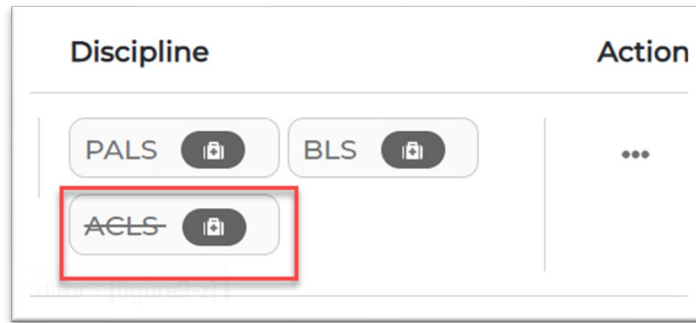


Figure 20. Unaligned discipline strike out.

Note: There is no immediate mechanism to undo this action. The instructor will need to go back through the **Alignment Request** process to be realigned with the selected disciplines, if needed.

For Instructors With Single Discipline Alignments

The screen shown in Figure 19 only appears if an instructor has alignments for multiple disciplines with a Training Center or Training Site.

- If the instructor has just one alignment, then a pop-up appears to allow the removal of the single alignment (Figure 21).



Figure 21. Unalign confirmation pop-up.

- Selecting **Cancel** returns the user to the **Instructors** page and cancels the action.
- Selecting the **Remove Alignment** button automatically results in the instructor being unaligned.
 - Currently, there is no confirmation message that appears after the **Remove Alignment** button is selected. The unalignment happens immediately.

Note: There is no immediate mechanism to undo this action. The instructor will need to go back through the **Alignment Request** process in order to be realigned, if needed.

5.1.4 Manage Alignment

To manage the details of an instructor’s alignments and permissions, follow these steps:

- From the **Instructors** page, the user should navigate to the Instructors list and locate the record for the instructor that they would like to manage. Next, the user should select the 3 dots (...) in the **Actions** column. Then, from the pop-up box, they should select **Permissions and Alignments** (Figure 22).

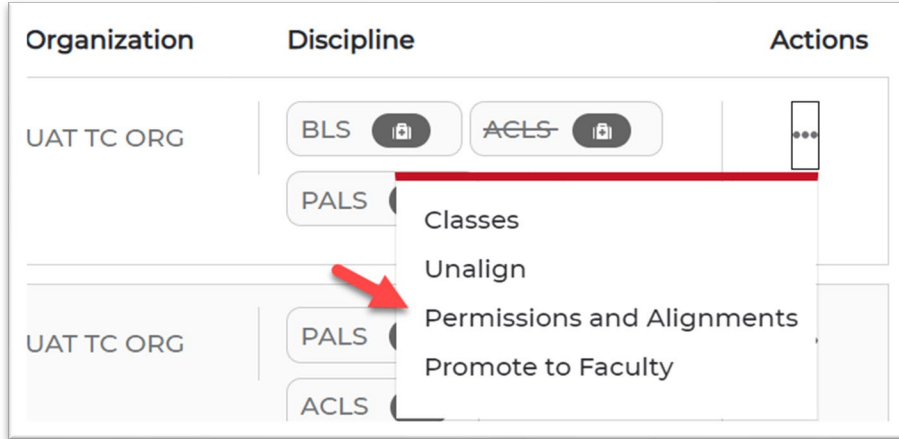


Figure 22. Instructor Request Actions.

- The **Manage Alignment** page appears as shown in Figure 23.

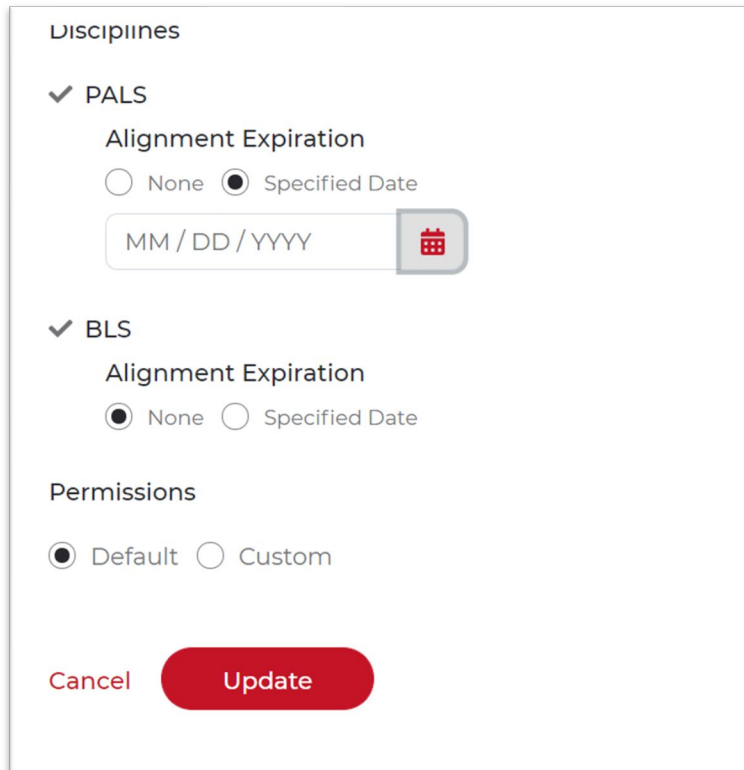


Figure 23. Manage Alignment page.

- The user may customize the **Alignment Expiration** for a specific discipline by selecting **Specified Date** and then the calendar icon as shown in Figure 24.

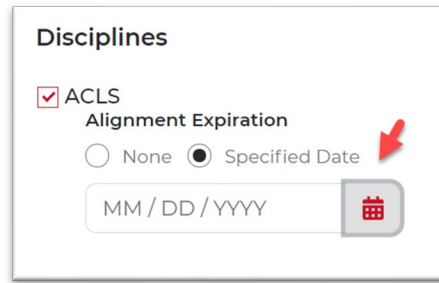


Figure 24. Calendar icon to choose alignment expiration date.

- The user may then set the date that they wish the alignment to expire on. The system will automatically unalign the instructor on the date selected, for the applicable discipline (Figure 25).

Note: The **Alignment Expiration** date typically only applies if the user wishes to have an instructor aligned on a temporary basis (for instance, a single class or a certain duration of time).

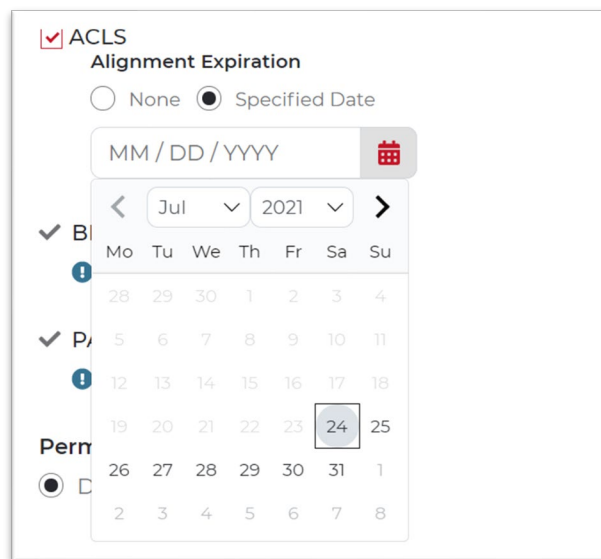


Figure 25. Alignment expiration date.

- The user may also choose either **Default** or **Custom Permissions** before sending the invitation (Figure 26).
 - **Default Permissions** are a generic permission set attributed to instructors, which facilitate the specific actions they must take in the system for their role.
 - **Custom Permissions** allow the user to determine what actions they would like the instructor to be able to take in the system and allow them accordingly.

Permissions
 Default Custom

Roster Management	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Student Management	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Write
Issue Exam	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Remediation	<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 type="checkbox"/> Write
Inventory Management	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Figure 26. Instructor permission.

- Once all alignment details have been updated, the user may select the **Update** button at the bottom of the form to finalize the changes (Figure 27).

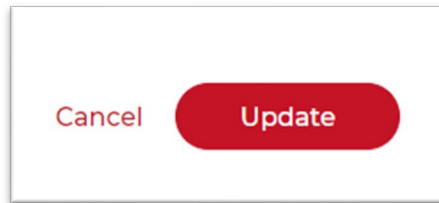


Figure 27. Update button.

- Upon successful completion of the changes, the user will be returned to the **Instructors** page to see a confirmation message of success (Figure 28).

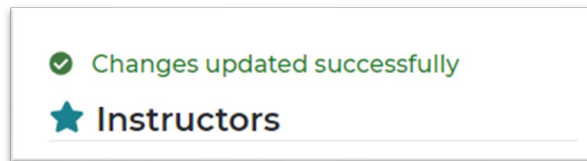


Figure 28. Changes updated successfully confirmation message.

5.2 Primary Alignments

An instructor may be primarily aligned with only a single Training Center or Training Site at any point. These primary alignments may be viewed on the **Primary Alignments** page.

5.2.1 Primary Alignments Page

- Once logged in as a TCC/TCA/TSC/TSA, the user may select Training Center or Training Site from the main navigation menu, and then select **Primary Alignments** from the drop-down menu, to be navigated to the **Primary Alignments** page (Figure 29).

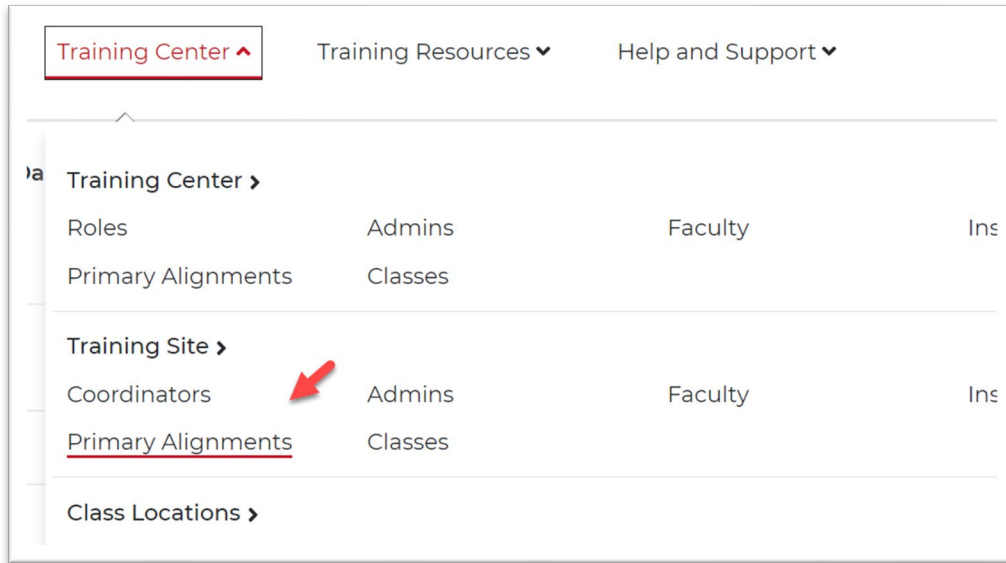


Figure 29. Primary Alignments link.

- Once on the **Primary Alignments** page, the user may select the Training Center or Training Site from their **Organization** drop-down menu (Figure 30).

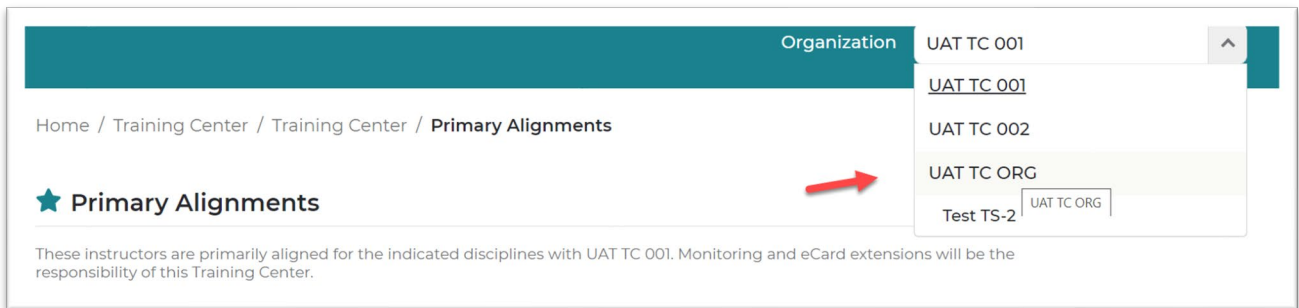


Figure 30. Organization drop-down menu.

- The **Primary Alignments** list, belonging to the selected Training Center or Training Site, displays as shown in Figure 31.

Home / Training Center / Training Center / **Primary Alignments**

★ Primary Alignments

These instructors are primarily aligned for the indicated disciplines with UAT TC ORG. Monitoring and eCard extensions will be the responsibility of this Training Center.

Training Site: Choose a Training Site (dropdown) | Disciplines: Choose a discipline (dropdown) | Instructor Search: Instructor ID, name, or email (input with search icon)

Export > | Sort by: Issue Date (dropdown with up/down arrows)

First Name	Last Name	Email Address	Discipline	Issue Date	Actions
Gabe 21070270541	Barrera	Gabe.Barrera@mailinator.com	BLS	07 - 19 - 2021	...
Lane 21076936445	huges	Lane.Hughes@mailinator.com	BLS	07 - 19 - 2021	...
Gabe 21070270541	Barrera	Gabe.Barrera@mailinator.com	PALS	07 - 19 - 2021	...
Lane 21076936445	huges	Lane.Hughes@mailinator.com	ACLS	07 - 19 - 2021	...

Figure 31. Primary Alignments List.

- The user may filter, search, or sort the **Primary Alignments** list, in addition to exporting it, as explained below.

Training Site Filter

- The user may filter records in the **Primary Alignments** list by **Training Site** (Figure 32).
 - If the user is a TSA/TSC, the filter will be prepopulated with their Training Site.

Training Site: Choose a Training Site (dropdown) | Disciplines: Choose a discipline (dropdown)

Dropdown menu items: Test123-UAT, Test-UAT-TS123, Test TS-2, Test TS-1

Email: Lane.I

Figure 32. Primary Alignments filter by Training Site name.

Disciplines Filter

- The user may filter records in the **Primary Alignments** list by discipline (Figure 33).
 - Only disciplines that the Training Center or Training Site are approved for will appear in the list.

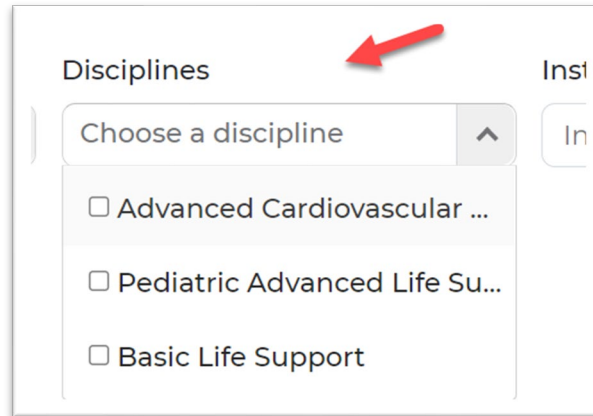


Figure 33. Primary Alignments filter by discipline.

Instructor

- The user may search for an existing instructor by entering an Instructor ID, name, or email address into the **Instructor Search** field and selecting the magnifying glass icon (Figure 34).

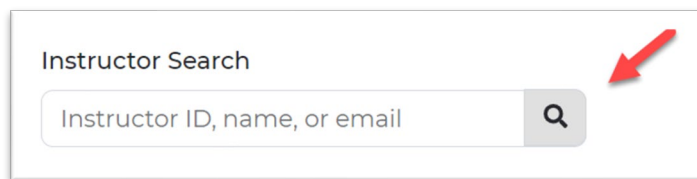


Figure 34. Primary Alignments filter by instructor.

Export and Sort By

- The user may export the **Primary Alignments** list by selecting the **Export** link (Figure 35).

:export >						Sort by: Issue Date	▼ ↓↑
First Name	Last Name	Email Address	Discipline	Issue Date	Actions		
Lane 21076936445	huges	Lane.Hughes@mailinator.com	PALS	07 - 19 - 2021	...		
Gabe 21070270541	Barrerez	Gabe.Barrerez@mailinator.com	BLS	07 - 19 - 2021	...		

Figure 35. Primary Alignments list export.

- The exported **Primary Alignments** list downloads as a CSV file, as shown in Figure 36.



Figure 36. Primary Alignments CSV file.

- The user may also sort the **Primary Alignments** list in ascending or descending order by **First Name**, **Last Name**, or **Issue Date** from the **Sort by** drop-down menu (Figure 37).

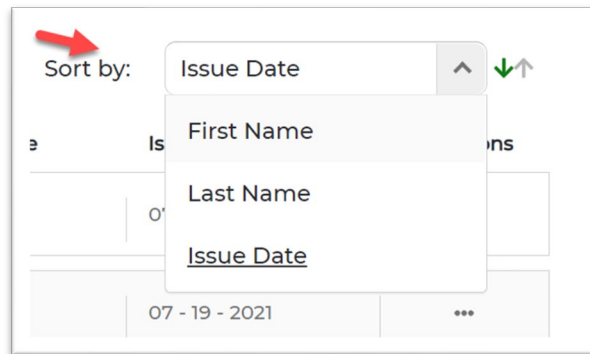


Figure 37. Primary Alignments list sort by options.