

# TRACORP LMS ADMIN GUIDES

Registration Fields and Users

## Registration Fields and Users

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## Registration Fields and Users

### Overview

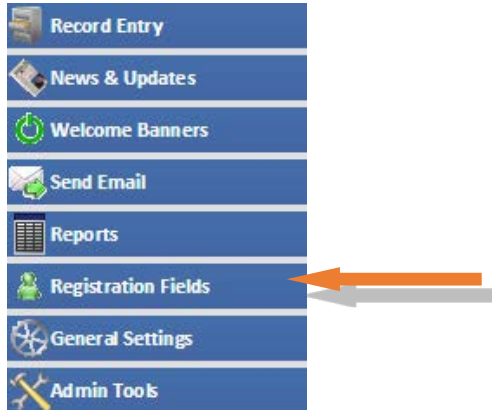
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This guide will demonstrate how to set up registration fields for users and also how to add/edit users.

- i. Custom Registration Fields
- ii. Users
  - a. Add
  - b. Search/Edit
- iii. Tools for Users
  - a. Export User Data
  - b. Import User Data

## Custom Registration Fields

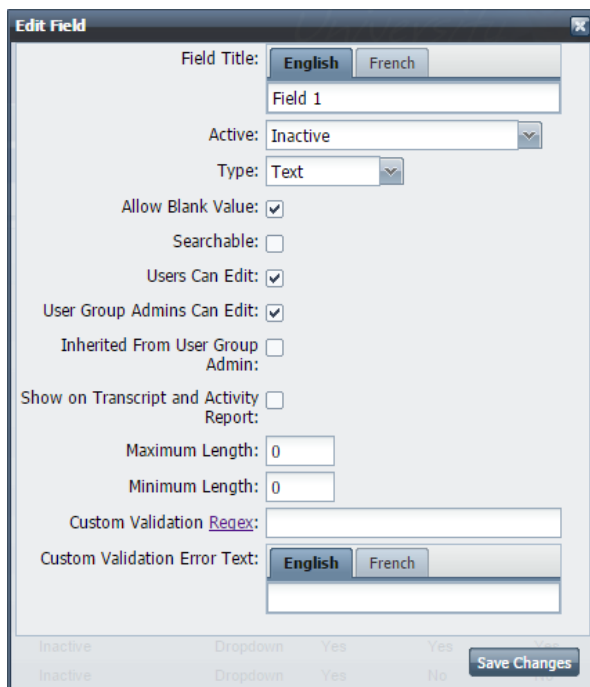
1. On the **Admin Navigation** bar, click **Registration Fields**.



2. Double-click on a **Registration Field** that you would like to add/edit.

Field ID	Field	Active	Type	Allow Blank	Searchable	Editable	Inherited	Show In Report
field1	Field 1	Inactive	Text	Yes	No	Yes	No	No
field3	Field 2	Inactive	Text	Yes	No	Yes	No	No
field2	Field 3	Inactive	Text	Yes	No	Yes	No	No
field4	Field 4	Inactive	Text	Yes	No	Yes	No	No
field6	Field 5	Inactive	Text	Yes	No	Yes	No	No

3. Change the option as applicable in the **Edit Field** window.

The 'Edit Field' window is a dialog box with a title bar. It contains several configuration options for a field. At the top, there are tabs for 'English' and 'French'. Below that is a text input field containing 'Field 1'. There is a dropdown menu for 'Active' set to 'Inactive' and another for 'Type' set to 'Text'. Below these are several checkboxes: 'Allow Blank Value' (checked), 'Searchable' (unchecked), 'Users Can Edit' (checked), 'User Group Admins Can Edit' (checked), and 'Inherited From User Group Admin' (unchecked). There is also a checkbox for 'Show on Transcript and Activity Report' (unchecked). Below these are two input fields for 'Maximum Length' and 'Minimum Length', both set to '0'. There is a text input field for 'Custom Validation Regexp:'. At the bottom, there are tabs for 'English' and 'French' above another text input field for 'Custom Validation Error Text:'. At the very bottom, there are several small, partially visible labels: 'Inactive', 'Dropdown', 'Yes', 'Yes', 'Inactive', 'Dropdown', 'Yes', 'No', and a 'Save Changes' button.

- **Field Title** – The title that will be displayed on a user’s account preferences. If you have imported a second language, you will see the tab for that language so that you can enter text for that language.
- **Active** – Provides multiple options for how the registration field will display.:
  - **Visible to All** – Will display the field to all account types
  - **Visible to Main Admins Only** – Will display only to accounts that are type **Main Admin**
  - **Visible to All Admins** – Will display to any type of admin account
  - **Inactive** – Will not display to any account type.
- **Type** – How the information is input by the user or admin:
  - **Text** – Allows a typed text entry
  - **Number** – Allows only numbers to be entered
  - **Date** – Allows only a date to be entered
  - **Dropdown** – Allows selecting an option from a predetermined list. Check step 4 to learn how to create drop down options
- **Allow Blank Value** – When checked, no entry is required. If the option is not checked, information must be entered before a profile can be updated.
- **Searchable** – This option must be checked to allow the admin to search users based on the field.
- **Users Can Edit** – When checked, student and instructor types can edit the field.
- **User Group Admins Can Edit** – When checked, User Group Admin types can edit the field for users.
- **Inherited From User Group Admin** – When this option is checked and a User Group Admin updates a user’s profile, this registration field will be updated to what the User Group admin selected on the user’s profile.
- **Show on Transcript and Activity Report** – When this option is checked, the information will be displayed on a user’s transcript or activity report.
- **Maximum/Minimum Length** – These options allow you to determine how short or long the text can be. The wording will change to **Maximum/Minimum Value** if **Number** is selected as the **Type**.
- **Custom Validation [Regex](#)** – This field allows you to set rules on how text or numbers can be entered. (i.e., (###) ###-#### or AA#####). This can be ignored if **Type Date** and **Dropdown** is selected.
- **Custom Validation Error Text** – This is the message that will be displayed if the text or number is entered incorrectly on the profile. If you have multiple languages, you can click the language tab and enter a separate message.

4. If you are not adding/editing a registration field of type **Dropdown**, you can skip this step. When **Dropdown** is selected, **Dropdown Options** is added at the bottom. These will be the selectable options on the field. Adding options works similarly to Excel. See below the image for more details:

Dropdown Options:

English	French	Value	Admin Only
Option 1	Option 1	O1	<input type="checkbox"/>
<input type="text"/>			<input type="checkbox"/>

- i. Click **Add**, to add a new row.
  - ii. Double-click on **English** to add the text for your option.
  - iii. Press tab or double-click the new column. If you have more languages, they will have their own column to fill out.
  - iv. Add text for the value. **Value** is a unique identifier. It can only be used once for the registration field you are creating. This is the value that is used in User Group Autoassignments. (i.e., field1 = 'value')
  - v. Click the **Admin Only** checkbox, if applicable. When checked, only admins can see and select the option for themselves or users. Users will only see the option if it is selected for them.
5. When all options are added and/or selected, click **Save Changes**. You will now see the option displayed under the user preferences.

Preferences

<b>Required Information</b>			
Username:	admin	Email:	admin@tracorp.com
First Name:	Main	Last Name:	Admin
Change Password:		Confirm Password:	
<b>Additional Registration Information</b>			
Text Option:	Text	Number Options:	99999
Date Option:	10/1/2014	Dropdown:	Option1
<b>undefined</b>		Time Format:	Option 2
Date Format:	S M T W T F S	Timezone:	America/Phoenix
Timezone Country:	28 29 30 1 2 3 4		
	5 6 7 8 9 10 11		
	12 13 14 15 16 17 18		
	19 20 21 22 23 24 25		
	26 27 28 29 30 31 1		
	2 3 4 5 6 7 8		
	Today		
<input type="button" value="Update"/> <input type="button" value="Cancel"/> <input type="button" value="Log Out"/>			

**Note:** After you have created your fields, you can rearrange them in the order that you prefer. Simply drag and drop them to where you want them.

# Users

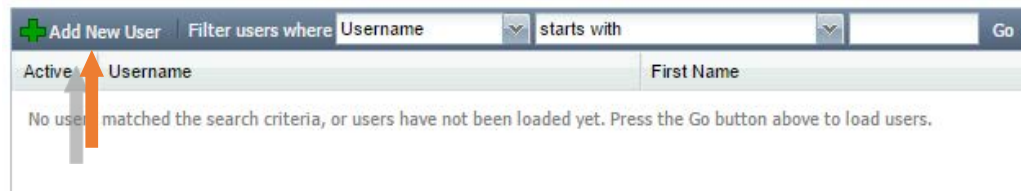
## Add

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1. On the **Admin Navigation** bar, click **Users**.



2. Click **Add New User** to bring up the **Add New User** window.



3. Fill out the **Required Information**:

- **User Type**
  - **Student** – Basic account for users to log on and take training
  - **Instructor** – Same as Student but with the ability to manage class and webinar sessions. This type of account is used to assign instructors to class and webinar sessions.
  - **User Group Admin** – An admin account with limited rights. Users with this account type can only be given access to users, content, etc., if it is part of a group to which they are assigned.
  - **Sub Admin** – An admin account with limited rights to access user, content, etc.
  - **Main Admin** – An admin with unlimited LMS access.
- **Username** – a unique user identifier, which is used to log on.
- **First and Last Name** – Fill out these fields with user's first and last name.
- **Password** – Used in conjunction with the user name to allow the user to log on.  
**Password** rules can be set under **General Settings > Password**.

- Fill out the required fields and any optional fields for the user. You will not be able to save unless you fill out at least the required fields. The timezone fields are optional for adding a user; however, the user will be required to fill out the field upon first logon.

**Add New User**

**Required Information**

User Type: Student

Username:

First Name:

Password:

Created By: admin

Email:

Last Name:

Confirm Password:

**Additional Registration Information**

Text Option:

Date Option:

Number Options:

Dropdown:

**Optional**

Date Format:

Timezone Country:

Time Format:

Timezone:

Update Assignments on Save:

Add User Cancel

4. Click **Add User**.



## Search/Edit

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1. On the **Admin Navigation** bar, click **Users**.



2. Select the different options to search for a user:



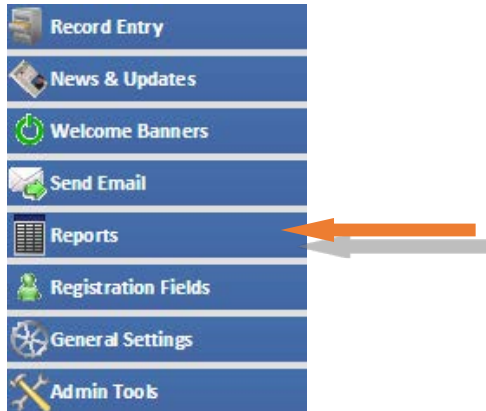
- **Filter users where** – This drop-down gives options **Username, First Name, Last Name,** and **Email Address** by default. In order to search by registration fields, **Searchable** must be on. See **Custom Registration Fields – Add/Edit** to learn how to do this.
  - The second drop-down allows you to pick **starts with, contains,** and **ends with** to help with your search.
  - The text box is where you will enter what you would like to search.
  - **Go** – Performs the search based on your options
  - **Clear Filter** – Shows the entire user list
  - **Show Inactive** – Shows only users that are inactive. You can use the same options above and below to search.
  - **User Type** – Allows you to pick the type of user you are searching for. Options are: **Student, Instructor, User Group Admin, Sub Admin,** and **Main Admin**
3. When you find the user that you would like to edit, double-click on the line and you will see all of the same options that are shown in the **Add User** section of this guide.

## Tools for Users

### Export User Data

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1. On the **Admin Navigation** bar, click **Reports**.



2. Click **Export User Data**.



3. On the **Format** drop-down, select one of the following options:
  - **Online** – Shows a pop-up of the list of users and their information
  - **Spreadsheet (CSV)** – Downloads a spreadsheet of records that can be opened in Excel
  - **PDF** – Downloads a PDF of the records. This cannot be manipulated.
4. If you expect a lot of information on the report, keep **Zip the report (recommended for large CSV and PDF files)** checked.
5. In **Show Extra Fields**, you can highlight extra registration fields you would like to view in the report. Use Ctrl + left-click to highlight multiple options.

6. Select student status from the **Active Users** drop-down.

The screenshot shows a form titled "Report Options - Export User Data". It includes a "Format:" dropdown set to "Online", a checked checkbox for "Zip the report (recommended for large CSV and PDF files)", a "Show Extra Fields:" list with options "Text Option", "Number Options", "Date Option", and "Dropdown", and an "Active Users:" dropdown set to "All Users".

7. Select a date range of users based on **Registration date** and **Last Login**

- **Date Type** – Provides you with a predetermined list of date ranges based on the current date
- **Date Range** – Allows you to select the date range for records

The screenshot shows two sections for date range selection. The "Registration date" section has a "Date Type:" dropdown set to "Select a value" and a "Date Range:" section with "From:" and "To:" dropdowns both set to "(Any)". The "Last Login" section has a "Date Type:" dropdown set to "Select a value" and a "Date Range:" section with "From:" and "To:" dropdowns both set to "(Any)".

8. Select **User Types** that you would like to see. At least one user type must be selected to pull this report.

The screenshot shows a "User Types:" section with five checkboxes: "Students", "Instructors", "User Group Admins", "Sub Admins", and "Main Admins".

9. **Sort By** – Choose how you would like the report sorted before downloading.

10. **Filter By/Terms** – Show specific users based on the User Group selected:

- **Filter By** – Choose the field for your filter from the drop-down.
- **Filter Terms** – Choose the option to filter. This field will populate with all possible options after choosing the field.

The screenshot shows three fields: "Sort By:" with a dropdown set to "Last Name", "Filter By:" with a dropdown set to "No filter", and "Filter Terms:" with a text area containing "No filter".

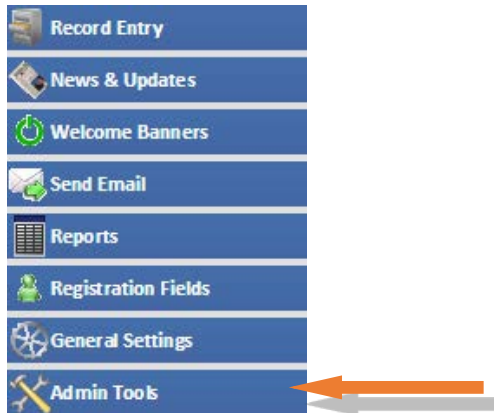
11. The **Output Options (CSV)** drop-down will let you select an option only if you select **Spreadsheet (CSV)**.
  - **Normal columns and headers** – When the report is pulled, it will show all registration fields as they are named.
  - **Columns and header for Import tool** – When the report is pulled, it will show all fields in the format needed to be imported. For example, if your 'field 1' is 'Hire Date', the export will show Hire Date as 'field1.'
12. If a user group has more user groups nested within, **Include Child Usergroups** will show the nested groups.
13. Find the User Group(s) on which you would like to run the report, and click the check box.
14. Once the User Groups are found, click **Create Report**.
  - The report will either show a pop-up or download, based on the **Format** selected.



## Import User Data

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1. On the **Admin Navigation** bar, click **Admin Tools**.



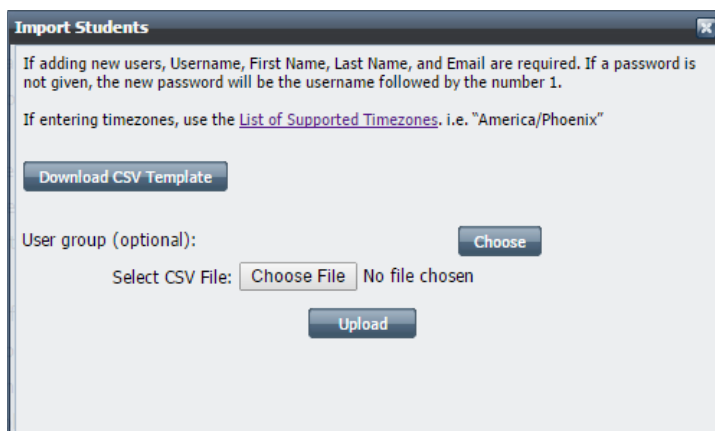
2. Click **Upload Students**.



3. Click **Download CSV Template** to download a template in which to load information. If you already have your CSV file built, verify that the format matches.

**Note:** If adding new users, Username, First Name, Last Name and Email are required. If a password is not given, the new password will be the username followed by the number 1.

If entering timezones, use the [List of Supported Timezones](#), i.e. "America/Phoenix."

A dialog box titled 'Import Students' with a close button in the top right corner. The text inside reads: 'If adding new users, Username, First Name, Last Name, and Email are required. If a password is not given, the new password will be the username followed by the number 1.' Below this is another line of text: 'If entering timezones, use the [List of Supported Timezones](#), i.e. "America/Phoenix"'. There is a 'Download CSV Template' button. Below that, it says 'User group (optional):' followed by a 'Choose' button. Underneath is 'Select CSV File:' followed by a 'Choose File' button and the text 'No file chosen'. At the bottom center is an 'Upload' button.

4. If you would like to assign your list of users to a specific User Group, click **Choose** next to **User group (optional)**. You will find the user group and highlight it and click **Select Usergroup**.
5. When your CSV file is ready, click **Choose File** to browse for your CSV file.
6. Once you choose your file, click **Upload**.

**Note:** If you are only **updating** users, all you need is the username and the field that you are updating. Make sure not to leave fields blank, as the tool will overwrite the users field with a blank file.