



Continuing Ed Tracker Live

User Manual



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Licenses and Renewals

In the Licenses section, you will define all of the various licenses, certifications and other education requirements needed by your users. You will use this section to define such information as the title and state of the license, renewal frequency and license requirements. The licenses section also gives you quick access to reports such as license about to expire, licenses ready to renew and expired licenses. The built in search feature allows you to search licenses, licenses and requirements, and user licenses.

Also See:

- *Manage Licenses*
- *License Requirements*

Manage License

Use Manage Licenses to define the various licenses and license requirements held by your users. It is recommended that you add all of the licenses and license requirements before adding users or courses to Continuing Ed Tracker. Use this section to:

- Define licenses, renewal frequency and license requirements
- Define additional education requirements
- View licenses about to expire, licenses ready to renew and expired licenses
- Search licenses, license requirements and user licenses

To access the Manage Licenses section:

1. Select License Management from the Main Menu or select Licenses and Renewals from the Top Menu.
2. Select Manage Licenses.
3. The Manage Licenses screen shows a list of existing licenses on the top, right side of the screen. Select a license from the list to view license details such as renewal frequency, credit requirements and list of users holding the license.

Also See:

- *License Requirements*
- *User Licenses*

Add A License

1. Click the Add A License link at the top of the Manage Licenses screen.
2. Enter a License Title, and State.
3. Enter Renewal Frequency. You have the option of defining renewal frequency in years, months, weeks or days. For example, if the license is required to be renewed every two years, you would enter 2 in the Renewal Frequency box and select Years from the Renewal Frequency drop-down box.
4. Select a Renewal Basis. Use this field to define if the license expires on a specific date each year or if it expires on the users anniversary date.
5. If Specific Date is selected in Renewal Basis, enter the date the license will expire. For licenses that expire on a specific date, for example August 1 of odd years, it is recommended that you update this

date after the specific date passes. For example, in the case above it is recommended that on August 2, 2013 or shortly after, to locate the license in the list and edit the date to read August 2, 2015. However, updating this date will not be required.

6. Click Add to enter your new license.
7. Your license will appear in the List of Licenses box on the Manage Licenses screen with a message stating the license has been added and instructing you to enter the credit requirements for the license.

Also See:

- *License Requirements*
- *User Licenses*

Edit A License

1. From the Manage Licenses screen, select the license you would like to edit from the List of Licenses box on the right. The license information will appear in the License Details section of the screen.
2. Enter the changes as needed and click Save. NOTE: Continuing Ed Tracker applies credits received to a user license based on the Renewed and Expires dates for each credit requirement of a license. It is important that these fields are accurate for each user license.
3. If changes are made to the Renewal Frequency, Renewal Basis or Specific Date fields and there are users currently holding the license, you will be warned that the change may affect these active licenses. Select OK to save your changes or Cancel to cancel your changes. If you save your changes, you will be redirected to the Update Licenses screen.
4. On the Update Licenses screen, a list of users currently holding the license will show on the screen. If the change to the license affects users currently holding the license, you will want to apply the changes to each user in the list as instructed below.
5. To apply the changes to the user licenses, click the View User button next to each user on the list and enter the changes in the date fields as needed. Review and update the Date Renewed and Expiration Dates as well as the Renewed and Expires dates for each credit requirement shown in the list.
6. Click Submit after all dates have been updated. Continuing Ed Tracker will automatically add or remove the credits received by the user based on the new dates entered and dates of the courses attended.
7. When finished, click the Return to License link to return to the list of users currently holding the license. Repeat for each user in the list.
8. When finished, click the Back To Licenses link.

Also See:

- *License Requirements*
- *User Licenses*

Delete A License

1. From the Manage Licenses screen, check the License Details box to make sure you are viewing the license you want to use. If the license you want to use does not appear in the License Details box, use the List of Licenses on the right to select the correct license.
2. Click the Delete This License link. A pop-up message will appear warning you that the license will be deleted from all users currently holding that license. If you do not want to delete the license from

users currently holding the license, click Cancel. Otherwise, click OK to delete the license.

NOTE: If you have a license that you will no longer be using, but you do not want to delete the license from user profiles, you can rename the license to indicate that it is no longer used. For example, if you have a license called Registered Nurse and a license called RN, and you no longer want to use the Registered Nurse license, you can rename the license to Registered Nurse-old or ZZ Registered Nurse to move it to the bottom of the list.

Also See:

- *License Requirements*
- *User Licenses*

License Requirements

License Requirements are added to a license to indicate the continuing education credits that are required to renew a license. When a user holding a current license attends a course, the credits received for attending the course are automatically compared to the beginning and ending dates, and the credit type of the license requirements. If a course date falls between the beginning and ending dates of a requirement, and the credit type received matches the credit type needed, the number of credits received are automatically applied to the license requirement.

Credit types are user defined and depend on state requirements for license renewal. Examples of credit types include Ethics, Teaching, General, etc. We have included a credit type called Total of All Credits which will keep a total of all credits received during the term of the license requirement.

At least one license requirement is required for each license, even if no credits are required for a license to be renewed. If no credits are required for a license, but you want to keep track of the renewal dates of the user currently holding the license, enter a License Requirement using the Total of All Credits credit type and enter 0 in the Number of Credits needed field.

Also See:

- *Examples*
- *User Licenses*
- *Manage Credit Types*

Add A License Requirement

1. From the Manage Licenses screen, check the License Details box to make sure you are viewing the license you want to use. If the license you want to use does not appear in the License Details box, use the List of Licenses on the right to select the correct license.
2. In the Credit Details section, select Add A Credit.
3. On the Add Credit Requirement screen, select a Credit Type from the drop-down list. (*See Manage Credit Types for editing the Credit Types that appear in the list*)
4. Enter the number of credits that are required for this credit type.
5. Select if the Credit Type is optional or required.

6. Use the description field to enter any notes or comments about the requirement. For example, if a credit requirement must be completed within the last year of the license renewal period, you can enter a note in the description field as a reminder of this requirement.
7. Use the Due fields if you have a license requirement that has a different date span than the license. For example, if the licensee is required to receive 40 credits during the term of the license and 20 of those are required to be received within the first 12 months, enter 1 in the beginning month and 12 in the ending month.
8. Click Add. If there are users currently holding the license, you will be redirected to the License Requirement Change screen showing a list of users currently holding the license. To automatically apply the new license requirement to all user licenses and locate credits earned towards the requirement, select Continue. Optionally, you can manually add the new requirement to each user by selecting View/Edit User next to each user.
9. When finished click Return to Licenses.

Also See:

- *Examples*
- *User Licenses*
- *Manage Credit Types*

Edit A License Requirement

1. From the Manage Licenses screen, check the License Details box to make sure you are viewing the license you want to use. If the license you want to use does not appear in the License Details box, use the List of Licenses on the right to select the correct license.
2. In the Credit Details section, select Edit/Delete next to the credit requirement you want to edit.
3. In the Edit Credit Requirement screen, make the changes needed.
4. Click Save.
5. If there are users currently holding the license, you will be redirected to the License Requirement Change screen showing a list of users currently holding the license. To automatically apply the changes to the license requirement to all user licenses and locate credits earned towards the requirement, select Continue. Optionally, you can manually apply the changes to the requirement to each user by selecting View/Edit User next to each user.
6. When finished click Return to Licenses.

Also See:

- *Examples*
- *User Licenses*
- *Manage Credit Types*

Delete A License Requirement

1. From the Manage Licenses screen, check the License Details box to make sure you are viewing the license you want to use. If the license you want to use does not appear in the License Details box, use the List of Licenses on the right to select the correct license.
2. In the Credit Details section, click the Edit/Delete button next to the Credit Requirement you want to delete.
3. On the Edit Credit Requirement screen, click the Delete This Requirement link.

4. A pop-up message will appear warning you that the credit requirement will be deleted from all users currently holding that license. If you do not want to delete the requirement from users currently holding the license, click Cancel. Otherwise, click OK. The requirement will be deleted from the license and all users currently holding the license.

NOTE: In some cases, you want to edit license requirements for future license, but keep the requirements for all users currently holding the license. To do this, it is best to add a new license to the list for future license holders, leaving the original license as is. You will want to indicate in the license title, the difference between the two licenses. For example, if the license requirements for a Registered Nurse change for any license renewed after 2013, you can enter Registered Nurse-2013 in the License Title field or edit the previous license title to Registered Nurse-old.

Also See:

- *Examples*
- *User Licenses*
- *Manage Credit Types*

License Requirement Examples

Example 1

Your state requires that licensees must receive 30 continuing education credits to renew their license. Of those 30 credits, 5 must be ethics.

Credit Requirement Entries:

Entry 1

Credit Type: Ethics
Number of Credits: 5
Required/Optional: Required

Entry 2

Credit Type: Total of All Credits
Number of Credits: 30
Required/Optional: Required

Example 2

Your state requires that licensees must receive 30 continuing education credits to renew their license. Of those 30 credits, 20 must be within the last 12 months of the two year license.

Credit Requirement Entries:

Entry 1

Credit Type: Total of All Credits
Number of Credits: 20
Required/Optional: Required
Due - Beginning Month: 13
Ending Month: 24

Entry 2

Credit Type: Total of All Credits
Number of Credits: 30
Required/Optional: Required

Example 3

Your state does not require any continuing education credits for a license to be renewed. However, a renewal form must be submitted every two years.

Credit Requirement Entries:

Entry

Credit Type: Total of All Credits
Number of Credits: 0
Required/Optional: Required

Users

The users section is used to pull together all license and course information for a user. Each User Home screen shows user contact information, current user licenses, and a list of courses taken. From this screen you can add, edit and renew user licenses; add, edit or remove credits received and applied to a license; add course registration or courses attended; and edit credits received for a course. The built in search feature allows you to search users, search user licenses and search user licenses with credits needed and received.

Also See:

- *Manage Users*
- *User Licenses*
- *User Courses*

Manage Users

Manage Users can be accessed by selecting User Management from the Main Menu or selecting Users from the top menu. Use this section to:

- Add, edit or delete users
- View and manage user licenses
- View and manage courses attended by user
- View and manage credits needed and received
- Search users, user licenses and courses attended
- Register a user for a course

To access the Manage Users section:

1. Select User Management from the Main Menu or select Users from the Top Menu.
2. Select Manage Users.

The Manage Users screen shows a list of users in alphabetical order by last name. You can change the sort order of your list of users by using the arrow buttons next to each field in the list of users section. Click View/Edit next to a user in the list to open the User Home screen.

Several fields have been added above the list of users to allow you to quickly find a user or group of users. Enter or select your criteria using the search fields and select Search to locate a user or group of users.

Additional Features:

- [*Advanced Search*](#) - click this link for additional flexibility when searching your users.
- [*Print List*](#) - click this link to print the list of users. The print feature will remember the sort order and any criteria entered.
- [*Print Custom Report*](#) - click this link to select the fields, sort order and grouping before printing your list. This report will remember the criteria entered.
- [*Export List*](#) - click this link to export the list of users in Excel format. The export feature will remember the sort order and any criteria entered.
- [*Export List All Available Fields*](#) - click this link to export all user fields in Excel format. The export feature will remember the sort order and any criteria entered.
- [*Clear Search*](#) - click this link to clear the criteria entered and show the entire list of users.

Also See:

- [*User Licenses*](#)
- [*User Courses*](#)

Add A User

1. From the Manage Users screen, click Add New User.
2. Enter the information requested. All required fields are marked with *. The Email/Username entered will be the email address the user uses to log into their account. The Password entered will be the password the user uses to log into their account.
3. Click Email Profile and Login Instructions to User to automatically send an email to the user.
4. Click Submit.

Also See:

- [*User Licenses*](#)
- [*User Courses*](#)

Edit A User

1. From the Manage Users screen, locate the user in the list of users or use the Quick Search fields to quickly locate the user in the list.
2. Click the View/Edit button next to the user to open the User Profile screen.
3. Click the Manage/Edit User Profile link in the User Profile section.
4. Edit the profile as needed.
5. To edit the user password, click the Change Password link near the top of the screen.
6. Click Email Profile and Login Instructions To User to automatically send an email to the user with their updated profile.

7. Click Submit.

NOTE: If you are changing both the user profile and the password, you should only click the Email Profile and Login Instructions To User on the last screen you change. For example, if you want to change the user profile information and the user password, open the Edit User screen and click Change Password. Change the password and click Submit. Do not check the Email Profile and Login Instructions To User box. Next, edit the user information on the Edit User screen. When finished, check the Email Profile and Login Instructions To User, then click Submit. The user will then get one email showing all of the updates to their profile.

Also See:

- *User Licenses*
- *User Courses*

Delete A User

It is recommended that you set a user to inactive instead of deleting a user. When a user is deleted, all of their license and courses attended information will also be deleted.

1. From the Manage Users screen, locate the user in the list of users or use the Quick Search fields to quickly locate the user in the list.
2. Click the Delete button next to the user.
3. A message will appear indicating that the user and all of their information will be permanently removed from the Continuing Ed Tracker. Click OK to remove the user and all related information from the Continuing Ed Tracker.

Also See:

- *User Licenses*
- *User Courses*

User Home

To access the User Home screen, use the Manage Users screen to locate the user. Click the View/Edit button next to the user to open the User Profile screen.

The User Home screen is divided into three sections, User Profile, Current and Active Licenses, and Courses.

From the User Home screen, you can:

- Edit the user profile
- Manage user licenses including adding, editing and renewing a license
- View license renewal and expiration dates
- View renewed and expired licenses
- View which licenses are ready to renew (all requirements met) and which are not ready to renew
- View course registration for upcoming courses
- Register a user for an upcoming course
- Manage courses attended and credits received

- View and edit credits earned and applied
- Search to find unapplied credits
- View registration or attendance details
- Print attendance certificates

Also See:

- *User Licenses*
- *User Courses*

User Licenses

You will manage user licenses from the User Home screen. To access the User Home screen, use the Manage Users screen to locate the user. Click the View/Edit button next to the user to open the User Profile screen.

All current and active licenses are displayed in the middle of the screen showing date renewed, expiration date, license title, license state and indicating if all requirements for the license have been met.

- To view details for a specific license, click the View Details button.
- To renew a license, click the Renew button.
- For additional features such as adding a new license, viewing past or expired licenses, or to delete a license, click the Manage Licenses link.

Managing User Licenses

From the User Home screen, click Manage User Licenses. A list of active licenses will show on the screen. If the license is expired and has not been renewed or set as inactive, a message will appear below the licenses asking you to either renew the license or set the license to inactive.

- To view details of a license including details of all credits received and needed, click the Details button.
- To renew a license, click the Renew button.
- To delete a license, click the Delete button.

From the Manage Users Licenses screen, you can also add a license to a user profile by clicking the Add A License link at the top of the screen. See Add A User License for instructions on adding a license.

To view licenses that have been renewed or set as inactive, click the View Renewed Licenses or View Inactive Licenses link.

Also See:

- *User License Details*

Add A User License

You can add a license to a user by clicking the Manage Users Licenses link on the User Home screen. From the Manage User Licenses screen, click Add A License.

1. Select a license from the list.
2. Enter the user license number.
3. Enter the date the license was last renewed or activated.
4. Enter the date the license will expire.
5. Click Submit. CE Tracker will check credits received and apply matching credits to the license requirements.

NOTE: Before you add a new license for this user, you should check to be sure the license does not already exist. To do this, go back to Manage User Licenses and click Current Licenses and Past Licenses. If the license you are adding already exists, click to renew the license instead of adding a new license. If the license does not already exist, continue entering it below.

Also See:

- *User License Details*
- *Find Unapplied Credits*
- *Apply Credits Earned*

Renew A User License

You can renew a user license by clicking the Renew button next to the license on the User Home screen or the Manage User Licenses screen. If all of the requirements for the license have not been met, a warning message will appear on the screen. See [Find Unapplied Credits](#) for instructions on locating credits earned that have not been properly applied to the license. See [Apply Credits Earned](#) for options for adding credits earned to a license.

If all requirements have been met for a license, enter the date the license was renewed and the new expiration date for the license and click Submit.

The license that was renewed can now be viewed by clicking View Renewed Licenses from the Manage User Licenses screen. The new license will now show in the Current and Active Licenses section of the User Home screen and on the Active Licenses screen under Manage User Licenses.

Also See:

- *User License Details*
- *Find Unapplied Credits*
- *Apply Credits Earned*

Delete A User License

You can delete a user license from the Manage User Licenses screen. Locate the license in the list and click the Delete button next to the license you want to delete. Note that deleting a license will remove all credits earned towards that license. If you want to save that information, you should set the license to inactive after the license expiration date has passed.

User License Details

From the User License Details screen, you can:

- Edit a license including renewal and expiration dates, credit types needed and number of credits needed
- Add a license requirement to the license. NOTE: If the license requirement you are adding applies to all users holding the license, use the License Management section to add the requirement.
- Add credits received
- Find unapplied credits
- Renew the license
- Delete a license requirement

The User License Details screen shows details about the license and lists all of the license requirements showing credits needed, credits received and if a requirement has been fulfilled. Click Show under the Details column of a license requirement to view a detailed list of the credits that have been received and meet the requirement based on renewed and expiration dates, and credit type.

The Credits Applied column will show Yes if the credits have been applied to the license requirement and are included in the number of credits received. You can remove the credits from being applied to the license requirement by clicking the Remove button in the Update column.

If credits have been received that met the requirement based on renewal and expiration dates, and credit type, and these credits have not been applied to the license, the Credits Applied column will show No. You can add these credits to the requirement by clicking the Apply button in the Update column.

Additionally, you can click the Find Credits Received That Apply To This License link to refresh the credits applied too all of the license requirements. This function will check the renewal and expiration dates, and credit types of all license requirements and apply all credits earned that meet the requirements.

NOTE: It is a good idea to click the Find Credits Received That Apply To This License link after modifying a license in any way.

To access the User License Detail screen:

1. From the User Home screen or the Manage Licenses screen, locate the license in the list of User Licenses.
2. Click the Details button.

Also See:

- *Edit A License*
- *Apply Credits Earned*
- *Find Unapplied Credits*

Edit A User License

If a user license was not added correctly or the license terms or requirements changed, you can edit the user license by selecting Edit This License link from the User License Details screen. NOTE: To access the User

License Details screen, click the View Details button next to the User License on the User Home screen or click the Details button next to the license from the Manage Licenses screen.

To Edit License Number, dates, credit type or number of credits needed:

1. From the Use License Detail screen, click Edit This License.
2. Make the necessary change to the license. NOTE: If you make a change to the renewal or expiration date of the license, make sure you review the renewal and expiration dates of each of the license requirements as well.
3. Click Submit.
4. Continuing Ed Tracker will review all credits that have been applied to the license, remove any credits that no longer apply based on your changes and add any new credits that now apply.
5. You will see a message stating that your license has been updated near the top of screen. If everything is correct, click Return to License.

To add a requirement to a license:

1. From the User License Detail screen, click Add A License Requirement.
2. Enter the requirement Renewed and Expires dates, select a credit type from the list and enter the number of credits needed.
3. Click Submit.

To remove a license requirement:

1. Locate the requirement on the User License Details screen.
2. Click the Delete Requirement button.

Also See:

- *Apply Credits Earned*
- *Find Unapplied Credits*

Find Unapplied Credits

Credits received are applied to a user license based on the renewal and expiration date of each requirement, and based on the credit type entered for a requirement. When a course is marked as attended, Continuing Ed Tracker will automatically review the user license and apply credits received where appropriate.

However, there may be cases where credits are not properly applied to a user license. In this case, Continuing Ed Tracker provides several ways for you to refresh or edit the credits received and applied to a user license.

To refresh all credits applied to a user license:

1. From the User License Detail screen, click Find Credits Received That Apply To This License.
2. Your page will be refreshed and a message will appear on the screen indicated that all credits earned have been applied.
3. Click the Show link under the Details column for each requirement to review the applied credits.

To refresh credits applied to each license requirement:

1. Click the Show link under the Details column for each requirement. A list will appear showing the courses or sessions that fall between the renewed and expires dates of the requirement and match the credit type of the requirement.
2. If the credits have been applied, the Credits Applied column will show Yes.
3. To remove the credits, click the Remove button under the Update column.
4. If the credits have not been applied, the Credits Applied Column will show No.
5. To apply the credits, click the Apply button under the Update column.

Also See:

- *Apply Credits Earned*
- *Course Registration and Attendance*
- *User License Details*

Apply Credits Earned

Credits earned by a user are defined by marking a user as attending a course or session. If the course date is in the past and a user is marked as attending the course, Continuing Ed Tracker will check to see if the course or session date falls between the renewed and expires dates of the users license requirements, and if the credit type needed matches the credit type received. If both are true, the credits will be applied to the license requirements.

Continuing Ed Tracker offers many ways to manage course attendance and apply credits earned to a user license. See [Course Registration and Attendance](#) or [Find Unapplied Credits](#) for more information.

Also See

- *Course Registration and Attendance*
- *Find Unapplied Credits*
- *User License Details*

User Courses

User Courses define all continuing education credits received by a user. Courses can be added to a user profile from the User Home screen or through the Course Registration screen. When a user is marked as attending a course or session, Continuing Ed Tracker will automatically review the user's licenses and apply credits if the date falls between the renewal and expiration dates of the license requirement, and the credit type received for attending the course matches the credit type needed for the license requirement.

Courses

The Courses section is used to manage the courses that provide continuing education credits to users. Courses entered may be future course that allow for user registration or past courses that have been attended. Courses can be a single class or they can have multiple sessions.

Continuing Ed Tracker offers the flexibility of publishing upcoming courses on user pages and allowing users to self-register for the course. The course cost section also allows you to enter costs for the course based on user-type or registration date.

NOTE: If you would like the course registration information to be available on your public website and not just for your users, please contact customer service as customerservice@krcsoftware.com to discuss adding the option.

Also See:

- [Course Registration and Attendance](#)

Manage Courses

Use the Manage Courses section to:

- Enter upcoming course and allow your users to self-register.
- Enter upcoming courses and manage registration.
- Enter courses that have been attended by your users.
- Search Courses, Courses and Sessions, or Course Registration.

The Manage Courses screen shows a list of courses in descending order by date. You can change the sort order of your list of course by using the arrow buttons next to each field in the list of courses section. Click View/Edit next to a course in the list to open the View/Edit Course screen.

Several fields have been added above the list of courses to allow you to quickly find a course or group of courses. Enter or select your criteria using the search fields and click Search to locate a course or group of courses.

To access the Manage Courses section:

1. Select Course Management from the Main Menu or select Courses from the Top Menu.

Additional Features:

- [Advanced Search](#) - click this link for additional flexibility when searching your courses.
- [Print List](#) - click this link to print the list of courses. The print feature will remember the sort order and any criteria entered.
- [Print Custom Report](#) - click this link to select the fields, sort order and grouping before printing your list. This report will remember the criteria entered.
- [Export List](#) - click this link to export the list of courses in Excel format. The export feature will remember the sort order and any criteria entered.
- [Export List All Available Fields](#) - click this link to export all course fields in Excel format. The export feature will remember the sort order and any criteria entered.
- [Clear Search](#) - click this link to clear the criteria entered and show the entire list of course.

Also See:

- [Course Registration and Attendance](#)

Add A Course

To add a new upcoming course for registration or add a course that has been attended:

1. From the Manage Courses screen, click Add New Course.
2. If this is an upcoming course and you would like your users to see this course on their personal page, check the Show on User Pages checkbox.
3. If this is an upcoming course and you would like your users to be able to self-register for the course, check the Allow Registration For This Course On User Pages checkbox.
4. If the course has multiple sessions with different credits received for each session, check the This Course Has Multiple Sessions checkbox. NOTE: If the course does not have multiple sessions, but different user can receive different credits based on their user type, etc. you may want to select this option and enter the different credit options as individual sessions.
5. Enter the beginning date, title, location, sponsor and contact person.
6. Select the company that is offering the course. See [Manage Companies for Certificates](#) for information on editing this drop-down list. The company selected from the list will be the company that is listed on the attendance certificates that users receive for attending the course.
7. Enter the phone and email of the contact person for the course.
8. The website link and PDF brochure fields are available to provide additional information to a user if the course is available on the user pages.
9. Select if the course is free, or if the course cost is by course or by session. NOTE: If you do not need to track the course costs, select free.
10. Enter Registration Information and Course Description. The information entered in these fields will appear on the user pages if Show on User Pages was selected.
11. Click Continue To Enter Course Credits
12. You will be redirected to the Enter Credits Received screen.

If the course does not have multiple sessions, enter the number of credits and credit type received. Click Add. Your credits will appear in the All Credits For This Course list. Enter as many different credits received as needed for the course. NOTE: Users registering for this course will receive all of the credits in this list. See [User License Details](#) and [Course Registration and Attendance](#) for information on editing the credits that are received by a user.

If the course has multiple sessions, you will be required to enter a session date and title as well as the number of credits and credit type. When a user attends the course, they will receive credits for all sessions marked as attended. See [Course Registration or User License Details](#) for information on editing the credits that are received by a user.

13. After all possible credits earned are entered, click the Back To Course Detail link.
14. Review the information entered in Course Details and General Information sections of the screen. If changes are needed, make the changes and click Submit.
15. Click the Session or Credit tab box to review the sessions or credits entered for the course.
16. Add, edit or delete sessions or credits as needed.
17. If you are entering cost information for the course, click the Cost tab box. Click Add A Cost.
18. If the cost is by course, enter the cost. If there is only one cost for the course, click Update Cost. You also have the option of setting a cost if registration is paid before a certain date, a cost if paid after a certain date and select a group that the cost applies to. Click Update Cost for each cost entered. If the cost is by session, you will see a drop-down list of all of the session for your course. Select the session before entering your cost.
19. When finished, click the Back To Course Information link.

20. Review the information entered. When finished, click the Back To Courses link.

Also See:

- *Course Registration and Attendance*

Edit A Course

1. Locate the course from the Manage Courses screen and click the View/Edit button next to the course you want to edit.
2. Edit the information in the Course Details or General Information boxes as needed and click Submit.
3. If users have registered for or taken the course, you will be redirected to a screen alerting you that this change could affect the credits received by the user. Click Continue to update the user credits.

Also See:

- *Course Registration and Attendance*

Edit Course Credits or Sessions

1. Locate the course from the Manage Courses screen and click the View/Edit button next to the course you want to edit.
2. Click the Credit or Session tab box.
3. Locate the Credit or Session you would like to edit and click the Edit button
4. Edit the Credit or Session as needed and click Submit.
5. If users have registered for or taken the course, you will be redirected to a screen alerting you that this change could affect the credits received by the user. Click Continue to update the user credits.
6. When finished, click Back To Course Detail.

Also See:

- *Course Registration and Attendance*

Edit Course Cost

1. Locate the course from the Manage Courses screen and click the View/Edit button next to the course you want to edit.
2. Click the Cost tab box.
3. Locate the Cost you would like to edit and click the Edit button.
4. Edit the cost as needed and click Update Cost.
5. When finished, click Back To Course Detail.

Also See:

- *Course Registration and Attendance*

Delete A Course

1. Locate the course from the Manage Courses screen and click the Delete button next to the course you want to delete.

2. A warning message will appear alerting you that if you delete the course, all registration information and credits received by users will also be delete.
3. Click OK to continue deleting the course.

Also See:

- *Course Registration and Attendance*

Course Registration and Attendance

Continuing Ed Tracker allows you to register users for an upcoming course or enter course attendance for completed courses. Credits are applied to license requirements based on courses or sessions attended. When a user is registered for an upcoming course, the applied credits show as pending until after the course date has passed and it is confirmed that they attended the course. Courses marked as Show On User Page will show the course on the user page so they can self-register or add the course to their profile. See [Add A Course](#) for more information

Register Multiple Users For A Course

Use this method to record registration for upcoming courses or attendance for past courses.

1. You can register multiple users for a course by selecting:
 - A. Course Registration from the Home Page
 - B. Register A User from the Users menu
 - C. Register A User For A Course from the Courses menuAfter selecting one of the above, you will be taken to the Select A Course screen.
2. The Select A Course screen shows a list of courses in descending order by date. You can change the sort order of your list of courses by using the arrow buttons next to each field in the list of courses section. Click the Select button next to a course in the list to open the Course Registration screen. Several fields have been added above the list of courses allow you to quickly find a course. Enter your criteria using the search fields and click Search to locate a course. Click the Select button next to a course to open the Course Registration screen.
3. A list of users appears on the bottom left of the screen in alphabetical order. You can change the sort order of your list of users by using the arrow buttons next to each field. To filter your list of users, use the search fields at the top of the screen. Enter or select your criteria and click Search to filter your list of users.
4. Check the box next to the user or users you want to register for the course.
5. By default, the Register User For All Sessions box is checked. When checked, the user will be automatically registered for all of the course sessions. Uncheck the box if you want to manually register the user for sessions.
6. When finished click Register Selected Users. The users you added will now show on the right side of the screen.
7. To remove a user from the registered users list, click the Remove button next to the user.
8. When finished, click the Go To Registration Details link.
9. Select a user from the Registered Users list to view details about the registration.
10. On this screen, you can enter payment information in the fields on the right of the Course Information section. Click Save to save the payment information for a user.
11. The Registration and Credit Information shows the credits or sessions and credits available for the course. If the Register User For All Sessions box was checked, Continuing Ed Tracker automatically

registers users for all available credits or sessions and credits. If the user is not registered for all credits or sessions and credits, click the Yes link to change it to No. If the Register User For All Sessions box is not checked, select the credits or sessions and credits that the user is registering for by clicking the No link next to the credit or session.

12. If the course is upcoming, the Attended box will read Pending. Register User For All Sessions box was checked and the course date has passed, the Attended box will show Yes next to all credits or sessions and credits that show Yes in the Registered field. To change the Attended to No, click the Yes link. If the Register User For All Sessions box was not checked and the course date has passed, Click the No link to change it to Yes for all credits or sessions and credits that the user should receive.
13. Repeat this step for all users registered for an upcoming course.
14. When finished click either the Return to Course or Return to Course Registration List link.

Register An Individual User For A Course

You can register an individual user for a course using the same method as described under Register Multiple Users For A Course. In addition, you can record course registration or attendance directly from the User Home screen. To use this method:

1. Follow the instructions under Users to locate a user's home screen.
2. Under Courses, select the Manage Courses link.
3. Review the list of courses to make sure the course is not already in the list.
4. Select the Course from the drop-down list of available courses.
5. By default, all course sessions will be marked as Attended. If you want to manually select which sessions the user attended, uncheck the box under Mark As Attended.
6. Enter a Date Attended if the date the user attended the course is different then the course date entered.
7. Click Continue
8. If the course does not already exist in Continuing Ed Tracker, click one of the links next to the Add A Course field.
9. To add a course from the Course Attendance screen, select one of the options described below.

Set Up Course Details: This option will allow you to set up a course as described in the Courses section. Adding a course using this method will give you the option of adding a Company for certificates, adding course contact information, adding multiple sessions for a course, adding registration information and adding a course description. If you do not need any of these fields, you can choose the Quick Add option.

Quick Add: This option allows you to quickly add a course to be used for registration or attendance. Using this option only basic course information to be entered. The available fields are Show On User Pages, Allow Registration For This Course On User Pages, Title, Begin Date, Credit Type and Number of Credits.

10. You will be redirected back to the Course Attendance page and your new course will now show in the list of courses for the user.
11. Click Details to review and edit the registration details.

Edit or Delete Course Registration or Attendance

1. You can edit or delete course registration or attendance by selecting one of the following:
 - A. Course Registration from the Home Page
 - B. View Course Registration from the Users menu
 - C. View Course Registration from the Courses menu

After selecting one of the above, you will be taken to the Select A Course screen.

The Select A Course screen shows a list of courses in descending order by date. You can change the sort order of your list of courses by using the arrow buttons next to each field in the list of courses section. Click the Select button next to a course in the list to open the Course Registration screen.

Several fields have been added above the list of courses allow you to quickly find a course. Enter your criteria using the search fields and click Search to locate a course. Click the Select button next to a course to open the Course Registration screen.

2. A list of users registered for the course will show on the right side of the screen.

To edit course registration:

NOTE: This only applies if the course has multiple sessions. If it is a single session course, see Delete Course Registration below.

1. Click the Go To Registration Details link.
2. Select the user from the list of Registered Users.
3. In the Registered Column, click the Yes link to change registration to No. Click the No link to change registration to Yes. **NOTE:** Changing the Registered Column will also change the Attended column. If the Attended column is incorrect, click the link to change the status.

To edit course attendance:

You can only edit course attendance after the course date has passed.

1. Click the Go To Registration Details link.
2. Select the user from the list of Registered Users.
3. In the Attended Column, click the Yes link to change Attended to No. Click the No link to change Attended to Yes.

To delete course registration:

1. Locate the user in the list of registered users box.
2. Click the Remove button.

To delete course attendance:

You can only delete course attendance after the course date has passed.

1. Click the Go To Registration Details link.
2. Select the user from the list of Registered Users.
3. In the Attended Column, click the Yes link to change Attended to No.

NOTE: You can also edit course registration and attendance from the User Home screen. From the User Home screen, locate the course in the Courses box and click Details. Follow step 3 in each section above to change the registered or attendance status.

User Courses

The User Home screen shows the last ten courses that the user has registered for or attended. To view details of a specific course, click the Details button. To remove a course from the list, click the Delete button. All credits received for attending the course will also be removed.

To view a full list of user courses, click the Manage Courses link.

User Course Details

To edit or delete course registration or attendance:

To edit or view details of a particular course, click the Details button next to the course in the list. The Course Details screen allows you to edit registration or attendance. See [Edit or Delete Course Registration or Attendance](#) for more information.

To view or edit how credits are applied:

Click the Show button next to a session or credit in the Session/Credit Information section. A list of user licenses and requirements that were active during the time of the course will be displayed. If the credit type earned matches a credit type needed for a license, Meets Requirements will be set to Yes.

If the credit earned has been applied to the license requirement, the Applied This Session column will show the number of credits applied. The update column will show a remove button allowing you to remove any credits that were incorrectly applied.

If the credit type earned has not been applied to the license requirement, the Applied This Session column will be blank. The Update column will show an Apply button allowing you to apply the credits to the license requirement.

To edit credits received:

The credits earned and applied to a license are based on date attended, credit type and number of credits. If a user attended a course, but receives a different number of credits, a different credit type or attended on a different day, you can edit those fields of data for that user.

If the course has already taken place, and the session is marked as attended, an edit button will appear on the screen. Click Edit to enter a new date attended, new number of credits received or select a new credit type and click Submit. The new data entered will be applied to any matching license requirements entered for the user.

To delete a course:

To remove a course from the list, click the Delete button. All credits received for attending the course will also be removed.

Recording Attendance after a course is complete

If users are registered for upcoming courses, the attended field will show pending until after the date of the course. After the date of the course, all course credits or sessions they were registered for will show Yes under attended and the Certificate of attendance will be available on the User Home screen. Credits earned for any course credits or sessions marked Yes as attended will be applied to the user's license requirements. If the user did not attend the course or sessions they registered for, the Attended field should be set to No. To do this:

1. Select Record Course Attendance from the Courses menu.
2. Select the Course from the list of courses and click the Select button.
3. Select the user from the list of users on the left side of the screen.
4. Locate the course credit or session in the Registration and Credit Information box and click the Yes link to set it to No.
5. If the user attended a session that they did not register for, click the No button to set it to Yes to show attendance.
6. Credits received for any course or session marked Yes as attended will be applied to the user license requirements. See User Course Details to information on how to edit credits received.

NOTE: See User Course Details above for instructions on editing the date attended, credit type or number of credits for a user.

Printing Attendance Certificates

Attendance certificates are available on the User Home screen after the course date has passed. The number of credits earned and type of credit will show on the certificate and are based on the course credits or sessions marked Attended for the user. To print an attendance certificate:

1. Open the User Home screen. See [Users](#) for more information.
2. Locate the course in the list of courses at the bottom of the screen.
3. Click the Certificate link next to the course.

Certificates are also available from the Manage Courses screen and the Course Details screen. To access the Manage Courses screen, click the Manage Courses link in the list of courses on the User Home screen. To access the Course Details screen, click the Details button next to the course in the list on the User Home screen.

Search and Reports

See Manage Users, Manage Licenses and Manage Courses for instructions on performing a simple search. In addition to those simple search screens, the more advanced search options listed below are also available. The advance search screens allow you to select the fields you would like to search and give you flexibility in how you search those fields. They also allow you to search multiple fields at the same time.

To search users:

Use this screen to search user profile information. To access this screen, select Search Users from the Users menu.

This screen can also be access by selecting Users from the Search menu.

To search user licenses:

Use this screen to search all users and licenses. This screen does not include license requirements. To access this screen, select Search Users from the User Menu. Click the Search User Licenses link.

This screen can also be access by selecting User Licenses from the Search menu.

To search user licenses with credits needed and received:

Use this screen to search all users, user licenses and license requirements including search for credits needed, credits received and requirements that are met. To access this screen, select Search Users from the User Menu. Click the Search User Licenses With Credits Needed and Received link.

This screen can also be accessed by selecting Credits Needed/Received from the Search Menu.

To search licenses:

Use this screen to search licenses. This screen does not include license requirements. To access this screen, select Search Licenses from the Licenses and Renewals menu.

This screen can also be accessed by selecting License Information from the Search menu.

To search license requirements:

Use this screen to search licenses and license requirements. To access this screen, select Search Licenses from the Licenses and Renewals menu. Click the Search Licenses and License Requirements link.

To search courses:

Use this screen to search general course information. To access this screen, select Search Courses from the Courses menu.

To search courses and sessions:

Use this screen to search courses, course credits and sessions. To access this screen, select Search Courses from the Courses menu. Click the Search Courses and Sessions link.

This screen can also be accessed by selecting Courses and Session from the Search menu.

To search course registration:

Use this screen to search course, course credits, sessions and registration. To access this screen, select Search Courses from the Courses menu. Click the Search Course Registration link.

This screen can also be access by selecting Search Course Registration from the Courses menu or by selecting Course Registration from the Search menu.

To use the Advanced Search option:

The built in search screens give you great flexibility in retrieving data from Continuing Ed Tracker. Understanding how the search screens work is important to retrieving the data you need. See [Search and Custom Report Examples](#) for more information.

Use the Advance Search screens:

1. Select a field from the Field List box. Some search screens include checkboxes to assist in formulating your search.
2. Select an operator. Note: The only operators that work with date fields are the Greater Than and Less Than operators.
3. Enter your criteria in the Criteria box.
4. Click Run Search. Your query will appear in the query box and your search results will show in the list at the bottom of the screen.
5. To add additional criteria to your search, select And or Or depending on how you want to connect your data. Repeat steps 1-4 above.
6. To run a new search, click Clear Query before entering your new criteria.

There are several options available for viewing, printing or exporting your search results. Use the arrow buttons next to the field names in your search results list to change the sort order of your search results. Use the View or Delete buttons to open or delete a record in your search results. The Print List and Export list links near the top of the screen allows you to print or export your search results as it appears in the list. The Export All Available Fields link will export your search results showing all fields available in the Field List box. See Custom Reports below for instructions on creating a report from your search results.

Custom Reports

1. Click the Print Custom Report link to open the Report Generator screen.
2. If you have created and saved a previously created report, the report will appear in the Select Existing Report drop-down list. To run the same report with your new search results, select the report from the list. If you want to create a new report and save it for future use, enter a name in the Enter A New Report Name field. If you do not want to save the report, these fields can remain empty.
3. Use the Report Title field to enter a custom title to your report. The title will appear at the top of the report page. This field is often used to describe the search results.
4. To design your report, select a field from the Select The Fields To Include box. With the field highlighted, click in one of the Field blanks on the right side of the screen. It is usually best for the first field to be the field you want to sort by. Repeat until you have all of the fields you want to include listed in the Fields (1-10). NOTE: The Field 1 is the only field that is required.
5. Use the Sort ASC, Sort DESC, Group, Total, and Count checkboxes to develop the layout for your report.
 - Sort ASC will sort the selected field in ascending order
 - Sort DESC will sort the selected field in descending order.
 - Group will create a heading above a selection of records. Group is often combined with Sort ASC or Sort DESC, and either Total or Count.

- Total will show a total for the field selected after each Group and at the end of the report.
 - Count will count the records in each group and at the end of the report.
6. Check the Save As New Report checkbox if you have opened an existing report to use the layout, but want to save it as a new report.

Search and Custom Report Examples

Example 1: *Search active user licenses that will expire in 60 days and the license requirements have not been met. Print a report showing the users and user licenses sorted by credit type needed and save the report for future use.*

1. Select Search Users from the User menu.
2. Click the Search User Licenses With Credits Needed/Received link.
3. Check the Active checkbox in the Licenses row.
4. Check the Needed checkbox in the Requirements row.
5. In the Field List, select the Date License Expires field.
6. In the Operator box, select Less Than.
7. In the Criteria box, enter the date.
8. Click Run Search.

To Print Custom Report:

1. Click the Print Custom Report link.
2. In the Enter A New Report Name field, enter User Licenses Expiring In 60 Days.
3. In the Select The Fields To Include box, select the Credit Type field.
4. Click in the Field 1 box. Check Sort ASC and Group checkboxes.
5. In the Select The Fields To Include box, select the Last Name.
6. Click in the Field 2 box. Check Sort ASC in the Field 2 line.
7. In the Select The Fields To Include box, select the First Name.
8. Click in the Field 3 box. Check Sort ASC in the Field 3 line.
9. In the Select The Fields To Include box, select the License Title.
10. Click in the Field 4 box.
11. In the Select The Fields To Include box, select the License State.
12. Click in the Field 5 box.
13. Click Save As New Report.
14. Click Run Report.

Example 2: *Search active user licenses that are ready to renew (all requirements met). Print a report showing course credits earned for each license requirement. NOTE: To print a report showing the courses that make up the course credits earned, open the User Home screen, click View Details next to the license you want to print and click Print Report on the User License Details screen.*

1. Select Search Users from the User menu.
2. Click the Search User Licenses With Credits Needed/Received link.
3. Check the Active checkbox in the Licenses row.
4. Check the All checkbox in the Requirements row.
5. Click Run Search.

To Print Custom Report:

1. Click the Print Custom Report link.

2. In the Enter A New Report Name field, enter User Licenses Ready To Renew.
3. In the Select The Fields To Include box, select the Last Name.
4. Click in the Field 1 box. Check Sort ASC and Group checkboxes.
5. In the Select The Fields To Include box, select the First Name.
6. Click in the Field 2 box. Check Sort ASC and Group in the Field 2 line.
7. In the Select The Fields To Include box, select the License Title.
8. Click in the Field 3 box. Check Sort ASC and Group in the Field 3 line.
9. In the Select The Fields To Include box, select the License State.
10. Click in the Field 4 box. Check Sort ASC and Group in the Field 3 line.
11. In the Select The Fields To Include box, select the Date Requirement Renewed.
12. Click in the Field 5 box.
13. In the Select The Fields To Include box, select the Date Requirement Expires.
14. Click in the Field 6 box.
15. In the Select The Fields To Include box, select the Credit Type.
16. Click in the Field 7 box.
17. In the Select The Fields To Include box, select the Credits Needed.
18. Click in the Field 8 box.
19. In the Select The Fields To Include box, select the Credits Received.
20. Click in the Field 9 box.
21. Click Save As New Report.
22. Click Run Report.

Example 3: Search upcoming courses and credits offered. Print a report by showing upcoming courses and the credits that can be earned. Save the report for future use.

1. Select Search Courses from the Courses menu.
2. Click the Search Courses and Sessions link.
3. In the Field List, select the Course Date field.
4. In the Operator box, select Greater Than.
5. In the Criteria box, enter the current date.
6. Click Run Search.

To Print Custom Report:

1. Click the Print Custom Report link.
2. In the Enter A New Report Name field, enter Upcoming Courses.
3. In the Select The Fields To Include box, select the Course Date.
4. Click in the Field 1 box. Check Sort ASC and Group in the Field 1 line.
5. In the Select The Fields To Include box, select the Course Title.
6. Click in the Field 2 box. Check Sort ASC and Group in the Field 2 line.
7. In the Select The Fields To Include box, select the Session Date.
8. Click in the Field 3 box. Check Sort ASC in the Field 3 line.
9. In the Select The Fields To Include box, select the Session Title.
10. Click in the Field 4 box. Check Sort ASC in the Field 4 line.
11. In the Select The Fields To Include box, select the Credit Type.
12. Click in the Field 5 box.
13. In the Select The Fields To Include box, select the Number of Credits.
14. Click in the Field 6 box.
15. Click Save As New Report.
16. Click Run Report.

Example 4: *Search courses attended in the last two years. Print a report by user showing courses attended and credits received and save the report for future use. NOTE: To print a report showing how credits received were applied to the user license requirements, open the User Home screen, click Details next to a course and click Print Report on the Course Details screen.*

1. Select Search Courses from the Courses menu.
2. Click the Search Course Registration link.
3. In the Field List, select the Course Date field.
4. In the Operator box, select Greater Than.
5. In the Criteria box, enter the date from two years ago.
6. Click Run Search.
7. Click the And connector.
8. In the Field List, select the Course Date field.
9. In the Operator box, select Less Than.
10. In the Criteria box, enter the current date.
11. Click Run Search.
12. Click the And connector.
13. In the Field List, select Attended (Yes/No).
14. In the Operator box, select Equal To.
15. In the Criteria box, enter Yes.
16. Click Run Search

To Print Custom Report:

1. Click the Print Custom Report link.
2. In the Enter A New Report Name field, enter Courses Attended In The Last Two Years.
3. In the Select The Fields To Include box, select the Last Name.
4. Click in the Field 1 box. Check Sort ASC and Group in the Field 1 line.
5. In the Select The Fields To Include box, select the First Name.
6. Click in the Field 2 box. Check Sort ASC and Group in the Field 2 line.
7. In the Select The Fields To Include box, select the Course Date.
8. Click in the Field 3 box. Check Sort ASC in the Field 3 line.
9. In the Select The Fields To Include box, select the Course Title.
10. Click in the Field 4 box.
11. In the Select The Fields To Include box, select the Session Title.
12. Click in the Field 5 box.
13. In the Select The Fields To Include box, select the Credit Type.
14. Click in the Field 6 box.
15. In the Select The Fields To Include box, select the Number of Credits.
16. Click in the Field 7 box
17. Click Save As New Report.
18. Click Run Report.

Example 5: *Search user licenses that will expire in the next 60 days for a particular state. Use the report format created in Example 1, edit the report and save it as a new report.*

1. Select Search Users from the Users menu.
2. Click the Search User Licenses link.
3. Check the Active checkbox in the Licenses row.
4. In the Field List, select the License State field.
5. In the Operator box, select Contains.

6. In the Criteria box, enter the state.
7. Click Run Search.
8. Click the And connector.
9. In the Field List, select the Date Expires field.
10. In the Operator box, select Less Than.
11. In the criteria box, enter the date 60 days ahead.
12. Click Run Search.

To Print Custom Report:

1. Click the Print Custom Report link.
2. In the Select Existing Report, select User Licenses Expiring In 60 Days.
3. Change the fields that will appear on the report by selecting the field in the Select The Fields To Include box and clicking in the Field box on the right.
4. Review your sort, group, total and count selections.
5. Enter a new name in the Enter A New Report Name field
6. Check Save As New Report checkbox.
7. Click Run Report.

Admin Management

The Admin Management section allows you to manage admin users, email content, drop-down list content and user functions.

Manage Admin Users

You will use Manage Admin Users to create accounts for Continuing Ed Tracker administrators. On the Admin Users screen, you will create admin user login information, set admin user control and indicate if the Admin User should receive email notifications when new users are added, a user profile is updated or when a user is registered for a course.

To access the Manage Admin Users screen:

1. From the Main Menu, select Admin Management.
2. Select Manage Admin Users from the Admin Management screen.

or

1. Select Manage Admin Users from the Admin Management menu.

A list of Admin Users will appear on the screen. Use the arrow buttons next to the field names to sort your list.

To add a new admin user:

1. Click the Add New link at the top of the screen.
2. Enter the name, email and password for the new admin user.
3. Select the Admin User Type
4. Select which, if any, notifications you would like the new admin user to receive. See Manage Email Content below for more information on these notifications.

5. Click Add.

To edit an existing admin user

1. Click the View/Edit button next to the admin user in the list.
2. Edit the information as needed.
3. Click Submit.

To delete an admin user:

1. Click the Delete button next to the admin user.
2. Confirm that the admin user you would like to delete is showing on the screen.
3. Click Delete

Restrict What Your Administrators Can See

You can assign groups of people to an administrator by creating a group of users or selecting a user company.

Creating a Group

Use this option to create a group of users that you want one of your administrators to manage.

To Create A Group

1. Select Manage Groups from the Admin Management menu.
2. Enter a name for the group and click Enter.
3. To add users to the group, click the View/Edit Users button.
4. Click the link Add Users To Group.
5. Select the users in the list and click Add Selected Users.

To Add A Group To An Administrator

1. Select Manage Admin Users from the Admin Management menu.
2. Select the Administrator from the list.
3. Click the View/Edit User Groups button.
4. Select the group from the Select Group drop-down and click Submit Group.
5. The administrator will now only be able to view the people in their group.

Selecting a User Company

1. Select Manage Admin Users from the Admin Management menu.
2. Select the Administrator from the list.
3. Click the View/Edit User Groups Button.
4. Select the company from the Select Company drop-down and click Submit Company.
5. The administrator will now only be able to view the people in the company.

Restrict What Your Administrators Can Do

The following options are available:

- Users - Add, Edit or Delete Users
- Licenses – Add, Edit or Delete Licenses.

- User Licenses – Add, Edit or Delete Licenses. Renew User Licenses, Edit License Requirements.
- Courses and Credits – Add, Edit or Delete Course and Course Credits. Add, Edit, Delete Course and Course Credits for users.

To assign rights to an administrator:

1. Select Manage Admin Users from the Admin Management menu.
2. Locate the administrator in the list.
3. If the administrator has full right, click View/Edit and set Admin User Type to Restricted.
4. Click Submit.
5. Click View/Edit User Rights.
6. Check or uncheck the options and click Submit.

Manage Email Content

Throughout Continuing Ed Tracker, there are automatically generated confirmation emails for the following:

- Course Registration - To User
- Course Registration - Admin Notification
- New User Account Created - To User
- New User Account Created - Admin Notification
- User Account Updated - To User
- User Account Updated - Admin Notification

The Admin Users have the ability to edit the subject, body and signature of these emails. See Manage Admin Users for information on indicating which Admin Users receive the Admin Notifications.

To access the Manage Email Content screen:

1. From the Main Menu, select Admin Management.
2. Select Manage Email Content from the Admin Management screen.

or

2. Select Manage Email Content from the Admin Management menu.

A list of the email confirmations will appear on the left side of the screen. The right side of the screen shows the Email Subject line, Email Body, Email Signature, and a drop-down box to select who the email should come from.

To edit the email content

1. Click the Email Type from the list on the left.
2. Edit the information as needed.
3. Click Submit.

User Page Setup Options

The User Page Setup Options screen allows you to enter an email address for the admin contact person. This email address will appear throughout the user pages as a link to contact the administrator if a user has questions or comments about their user profile. From this screen, you can also control how much your users can do. Simply check the items you want your users to be able to do on their own and uncheck any items you want to control on the Admin side.

To access the User Page Setup Options screen:

1. From the Main Menu, select Admin Management.
2. Select User Page Setup Options from the Admin Management screen.

or

1. Select User Page Setup Options from the Admin Management menu.

Manage Credit Types

Use the Manage Credit Types screen to populate the Credit Type drop-down box throughout Continuing Ed Tracker. It is best to populate the Credit Types list as thoroughly as possible before entering data into Continuing Ed Tracker.

To access the Manage Credit Types screen:

1. From the Main Menu, select Admin Management.
2. Select Manage Credit Types from the Admin Management screen.

or

1. Select Manage Credit Types from the Admin Management menu.

To add a new credit type

1. Enter the credit type in the Credit Type field and click Add.

To edit a credit type

1. Click the Edit button next to the Credit Type you want to edit.
2. If there are user licenses that already use that credit type, a message will appear warning you that if you edit the credit type, it will be edited on all existing user licenses.
3. To continue to edit all existing user licenses using the credit type, edit the credit type in the Credit Type box and click Submit. NOTE: If you do not want to edit the existing user licenses, click the Return To Credit Type List and enter a new credit.

To delete a credit type

1. Click the Delete button next to the credit type you want to delete.
2. If there are user licenses that already use that credit type, a message will appear warning you that you should select a different credit type from the list for each user before deleting the credit type. If

you delete the credit type and there are existing user licenses using that credit type, the deleted credit type will cause an error on the User Licenses screen.

3. If there are no user licenses using the credit type you want to delete, click the Delete button.

Manage User Types

User types are used on User Profile screen to distinguish different types of users. For example, you may have user types such as employees, non-employees, contract workers, or you may have members, non-members, students, etc.

To access the Manage User Types screen:

1. From the Main Menu, select Admin Management.
2. Select Manage User Types from the Admin Management screen.

or

1. Select Manage User Types from the Admin Management menu.

To add a new user type

1. Enter the new user type in the User Type box.
2. Click Add

To edit a user type

1. Click the Edit button next to the User Type you want to edit.
2. If there are users using the user type, a message will appear on the screen warning you that updating the user type will update all user profiles using that user type.
3. To continue editing the user type and update all user profiles using the user type, edit the text in the User Type box and click Submit. NOTE: If you do not want to edit all existing user profiles, click Return To User Type List and enter a new user type.

To delete a user type

1. Click the Delete button next to the user type you want to delete.
2. If there are user profiles that already use that user type, a message will appear warning you that you should select a different user type from the list for each user before deleting the user type. If you delete the user type and there are existing user profiles using that user type, the user profiles using that user type will no longer show the user type you are deleting.
3. If there are no user profiles using the user type you want to delete, Click the Delete button.

Manage Professions

Professions are used on User Profile screen.

To access the Manage Professions screen:

1. From the Main Menu, select Admin Management.
2. Select Manage Professions from the Admin Management screen.

or

2. Select Manage Professions from the Admin Management menu.

To add a new profession

1. Enter the new profession in the Profession box.
2. Click Add

To edit a profession

1. Click the Edit button next to the profession you want to edit.
2. If there are users using the profession, a message will appear on the screen warning you that updating the profession will update all user profiles using that profession.
3. To continue editing the profession and update all user profiles using the profession, edit the text in the Profession box and click Submit. NOTE: If you do not want to edit all existing user profiles, click Return To Profession List and enter a new profession.

To delete a Profession

1. Click the Delete button next to the profession you want to delete.
2. If there are user profiles that already use that profession, a message will appear warning you that you should select a different profession from the list for each user before deleting the profession. If you delete the profession and there are existing user profiles using that profession, the user profiles using that profession will no longer show the profession you are deleting.
3. If there are no user profiles using the profession you want to delete, Click the Delete button.

Manage Companies For Certificates

The Manage Companies For Certificates screen is used to save information on companies that sponsor courses and provide attendance certificates to their attendees. This screen allows you to enter a company information, upload a logo and upload a digital signature.

To access the Manage Companies For Certificates screen:

1. From the Main Menu, select Admin Management.
2. Select Manage Companies For Certificates from the Admin Management screen.

or

1. Select Manage Companies For Certificates from the Admin Management menu.

To add a new company

1. Select Add New from the Companies screen.

2. Company Name is the only field required. However, you have the option of also adding address and contact information for the company.
3. To upload a company logo that will appear on the attendance certificate, click the Browse button next to the Company Logo field.
4. Select the file you want to upload and click Open. The filename will appear in the Company Logo box and a thumbnail of the image will appear on the screen.
5. To upload a digital signature that will appear on the signature line of the attendance certificate, click the Browse button next to the Digital Signature line.
6. Select the file you want to upload and click Open. The file name will appear in the Digital Signature box and a thumbnail of the image will appear on the screen.
7. Enter a name in the Signature Line Text if you want the name in the Digital Signature to appear as text below the Digital Signature on the attendance certificate.
8. Click Add.

To edit a company

1. Click the View/Edit button next to the company you want to edit.
2. To remove a company logo or digital signature, click the Remove Image or Remove Signature links.
3. Edit the text fields as needed.
4. Click Browse next to the Company Logo or Digital Signature boxes to upload a new image for those fields.
5. Click Update.

To delete a company

1. Click the Delete button next to the company you want to delete.
2. A message will appear warning you that if you delete the company, the company information will no longer appear on certificates. If you want to save the company, click Cancel.
3. To continue to delete the company, click OK.