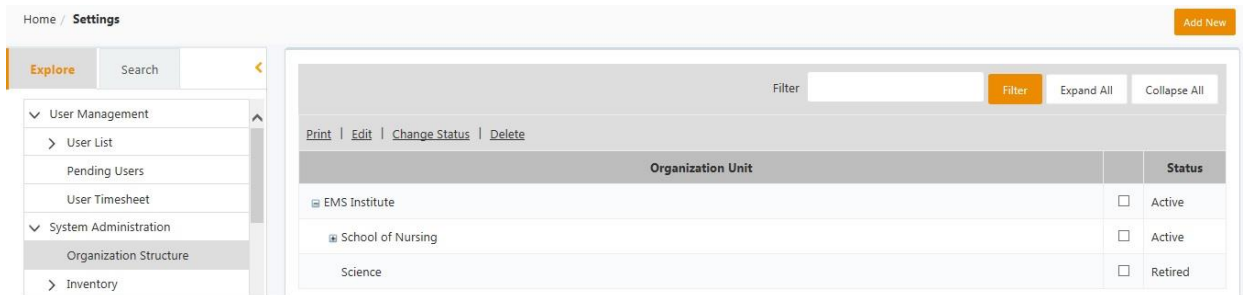


Organization Structure and Learner Groups

The Organization Structure sorts users into a hierarchy by dividing your parent Organization into sub-units.



Home / Settings Add New

Explore Search

- User Management
 - User List
 - Pending Users
 - User Timesheet
- System Administration
 - Organization Structure**
 - Inventory

Filter Filter Expand All Collapse All

Print | Edit | Change Status | Delete

Organization Unit	Status
EMS Institute	<input type="checkbox"/> Active
School of Nursing	<input type="checkbox"/> Active
Science	<input type="checkbox"/> Retired

Why create an Organization Structure?

- Run reports by unit name to see room and equipment usage.
- Designate Learner Groups within each Organization Unit, and then add learners as members.
- Apply permissions to an entire Organization unit to view and/or download videos.

Create an Organization Unit

Organization Unit ✕

To add or edit the organizational hierarchy, type the Unit Name, select the Unit Type, and select the Unit Head for this unit. To associate users with this level of the hierarchy, click the Learner Group checkbox. Click 'Save' to save this unit to the organization structure.

Organization Unit Name*

Learner Group

Organization Unit Type*

Organization Unit Head

Parent Name

EMS Institute >> Science

Display Name

EMS Institute >> Science

Profile Expiration Option

Members

To add users, click Add. To search for a specific user, type the name in the Search field. The search results are filtered based on your search criteria. To remove a user, click the Remove icon. To delete multiple users, click the checkbox next to each user's name and then click Delete.

Add

Print | Delete | Send Message

Filter All Filter

<input type="checkbox"/>	Name	Administrator	Educator	SP	Learner	Delete
No record(s) found.						

Save

1. Click **Settings > System Administration > Organization Structure.**

Home / Settings Add New

Explore Search

- ▼ User Management
- ▼ User List
 - > User Type
 - > User Task Access
 - > Learner Group
- Pending Users
- User Timesheet
- ▼ System Administration
 - Organization Structure

Filter Filter Expand All Collapse All

Print | Edit | Change Status | Delete

Organization Unit	Status
<ul style="list-style-type: none"> EMS Institute School of Nursing Science 	<input type="checkbox"/> Active <input type="checkbox"/> Active <input type="checkbox"/> Retired

- The list of Organization Units appears, with our parent organization at the top. If other units have not been added yet, the parent will be the only unit that appears.

Note: For new customers, your application is delivered with one parent Organizational Unit within the structure, which is listed at the top level of the Organization Structure. If you are an Arcadia customer, your Branches will migrate into units into your new system.

- Click the checkbox to the right of the Organization Unit that will be the parent to the unit you are creating.
- Click **Add New**. The Organization Unit screen appears.

Organization Unit ×

To add or edit the organizational hierarchy, type the Unit Name, select the Unit Type, and select the Unit Head for this unit. To associate users with this level of the hierarchy, click the Learner Group checkbox. Click 'Save' to save this unit to the organization structure.

Organization Unit Name*

Learner Group

Organization Unit Type*

Organization Unit Head

Parent Name

EMS Institute >> School of Nursing>>A test for Sarita

Display Name

EMS Institute >> School of Nursing >> A test for Sarita

Profile Expiration Option

Members

To add users, click Add. To search for a specific user, type the name in the Search field. The search results are filtered based on your search criteria. To remove a user, click the Remove icon. To delete multiple users, click the checkbox next to each user's name and then click Delete.

Add

Print | Delete | Send Message

Filter All Filter

<input type="checkbox"/>	Name	Administrator	Educator	SP	Learner	Delete
No record(s) found.						

Save

- Complete the *required fields.

Note: When adding members to an Organizational Unit, we recommend that you choose “Department” as the Organization Unit Type and check the Learner Group box so the members are automatically put into a Learner Group.

Learner Groups

Create Learner Groups to associate users with this Organization Unit.

Why create Learner Groups?

- Filters your search for learners by a selected Learner Group.
- A Learner Group is necessary if you will be allowing learners to self-register for sessions.
- Permissions to view and/or download videos can be applied to an entire Learner Group.

Organization Unit ✕

To add or edit the organizational hierarchy, type the Unit Name, select the Unit Type, and select the Unit Head for this unit. To associate users with this level of the hierarchy, click the Learner Group checkbox. Click 'Save' to save this unit to the organization structure.

Organization Unit Name*

Learner Group

Organization Unit Type*

Select ▼

Organization Unit Head

▼

1. Click the **Learner Group** checkbox.
2. Click **Add** to search for and select users and then click **Add**.
3. Click **Save** to save the members of this organization unit.

Note: Click F5 to refresh the page after you add a learner group. The Learner Group will appear in **User Management > User List > Learner Group**.

Add Members to an Organization Unit

Organization Unit		Status
<input type="checkbox"/> EMS Institute		<input type="checkbox"/> Active
<input type="checkbox"/> School of Nursing		<input type="checkbox"/> Active
Science		<input type="checkbox"/> Retired

- From **Settings > System Administration > Organization Structure**, click the checkbox to the right of the unit and then click the **Edit** hyperlink.

Users ✕

Search the users using search options. To add users to the organization unit, click the checkboxes next to the desired users and then click **Add**.

Search

User Type
 Educator Learner Administrator

Role **Graduation Year** **Keywords**

<input type="checkbox"/>	Name	Username	Email	Type
<input type="checkbox"/>	Admin, Leslie	ladmin	ladmin@ems.com	Administrator
<input type="checkbox"/>	administrator, administrator	administrator	administrator@ems.com	Educator
<input type="checkbox"/>	Boggs, Larry	larry	larry@ems.com	Educator, Administrator
<input type="checkbox"/>	Brookhouser, Mike	Mike		Administrator
<input type="checkbox"/>	Chalmers, Deirdre	deirdre		Learner, Educator, Administrator, SIM Tech
<input type="checkbox"/>	ems, Alok	alok	aloksax@gmail.com	Educator, Administrator
<input type="checkbox"/>	ems, Anurag	anurag	anurag@ems.com	Educator, Administrator
<input type="checkbox"/>	ems, ashok	ashok		Educator
<input type="checkbox"/>	ems, Deepak	deepak		Educator, Administrator
<input type="checkbox"/>	ems, f18	f18	f18@ems.com	Educator
<input type="checkbox"/>	ems, f19	f19	f19@ems.com	Educator
<input type="checkbox"/>	ems, f2	f2	f2@ems.com	Educator
<input type="checkbox"/>	ems, f20	f20	f20@ems.com	Educator
<input type="checkbox"/>	ems, f28	f28	f28@ems.com	Educator
<input type="checkbox"/>	ems, f29	f29	f29@ems.com	Educator
<input type="checkbox"/>	ems, f3	f3	f3@ems.com	Educator
<input type="checkbox"/>	ems, f4	f4	f4@ems.com	Educator
<input type="checkbox"/>	ems, f42	f42	f42@ems.com	Educator
<input type="checkbox"/>	ems, f46	f46	f46@ems.com	Educator
<input type="checkbox"/>	ems, f47	f47	f47@ems.com	Educator

197 record(s) found...

2. Click **Add**.
3. Select the users by checking the checkbox(es).
4. Click **Save**.
5. To add a user to the group, click **Add**.

Filter your user search

Users ×

Search the users using search options. To add users to the organization unit, click the checkboxes next to the desired users and then click **Add**.

Search

User Type
 Educator Learner Administrator

Role **Graduation Year** **Keywords**

Filter All

<input type="checkbox"/>	Name	Username	Email	Type
<input type="checkbox"/>	Admin, Leslie	ladmin	ladmin@ems.com	Administrator

1. Check the checkboxes to filter your search by **user type** or use the drop down menu to filter your search by **user role**.
2. Type a keyword (for example: part of a user name) in the **Keyword** field and click **Search**.
3. Type the name in the Search field and then click **Search**.
6. The search results are filtered based on your search criteria. Select the user by checking the checkbox to the left of their name and then click **Save**.

Add a user to a unit or learner group through their profile page

1. Click **Settings > User Management > User List** and locate the user from the Search Results.
2. Click the user's **name** hyperlink in the Name column. This will open their **Profile Page**.
3. Go to the **Permissions** section of the page. The **Organization Units** will be listed in the Organization Structure grid.
4. Check the checkboxes in the **Member** or the **Administrator** column of any of the appropriate unit.
5. Click **Save Changes**.

Verify User is in a Learner Group from the Explore tab

Click **Settings > User Management > User List > Learner Group**.

Note: Click F5 to refresh the page after you add a learner group. The Learner Group will appear in **User Management > User List > Learner Group**.

Verify User is in a Learner Group from their Profile page

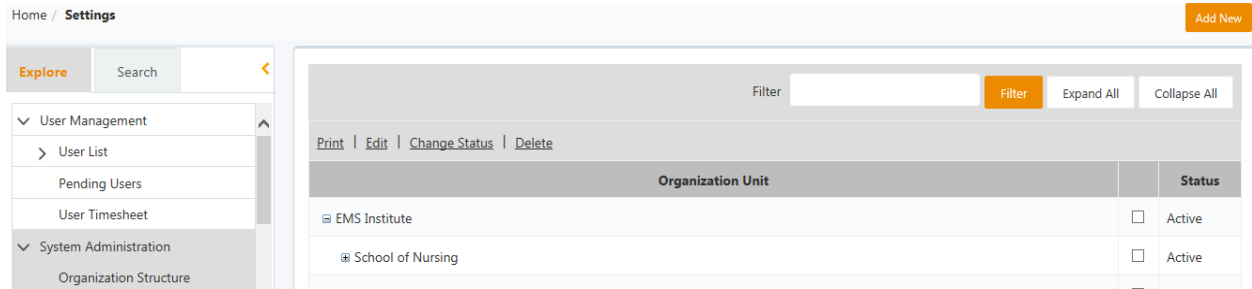
1. Find your user's name by clicking **Settings > User Management > User List > User Type > Learner**.
2. Click on the user name to open the User Profile.
3. In the **Permissions** section of the page, in the Learner Groups grid, verify the checkbox is checked next to the Learner Group in which you want the user to be a member.
4. Click **Save Changes**.

To Remove Users from an Organization Unit

1. Click **Settings > Organization Structure**.
2. Click the checkbox to the right of the Organization Unit of the member you wish to remove
3. Click the **Edit** link at the top of the grid.
4. From the Members grid, locate the user you want to remove, click the checkbox next to the name and then click **Delete**.
5. To delete multiple users, click the checkbox next to each user's name and then click the Delete link at the top of the grid.
6. Click **Save**.

Change Organization Unit Status from Active to Retired

1. In **Settings > System Administration > Organization Unit**, click the checkbox to the right of the unit listed to select it.



Home / Settings Add New

Explore Search

User Management

- User List
- Pending Users
- User Timesheet

System Administration

- Organization Unit

Filter Filter Expand All Collapse All

[Print](#) | [Edit](#) | [Change Status](#) | [Delete](#)

Organization Unit	Status
EMS Institute	<input type="checkbox"/> Active
School of Nursing	<input type="checkbox"/> Active

2. Click the **Change Status** hyperlink at the top of the grid.
3. Click the Status drop-down and then select Retired.
4. Click **Change Status** to save the change.