NADA

UNIVERSITY
ONLINE

TRAINING ADMINISTRATOR GUIDE

March 2016

TABLE OF CONTENTS

This guide is updated regularly. Please check back often for updates.

INTRODUCTION

The Training Administrator Guide assists dealerships in delivering NADA University Online learning content to their employees. This guide provides information on:

✓ How to become a Training Administrator

✓ How to manage your employee roster

✓ How to establish and maintain training levels

✓ How to enroll staff in courses

✓ How to navigate and use the Personalized Learning Dashboard

✓ How to generate reports

✓ How to manage system functionality to meet training needs

To become a Training Administrator, contact the NADA University Online Customer Service team:

• Phone: 800.557.6232

• Email: nadauniversity@nada.org

• Hours of Operation: Monday - Friday, 8:30am-4:45pm ET

Upon receiving the request, NADA's Customer Service team will verify the user's status and, upon approval, will provide the user with the permissions previously described.

THE ROLES OF THE TRAINING ADMINISTRATOR

Training Administrators are NADA University Online users who have the necessary system permissions to access and perform the following functions.

MANAGE THE COMPANY ROSTER
With this permission, the Training Administrator has the ability to add new Training Administrators, edit user profiles, change user training levels and remove users who are no longer at the dealership.

PURCHASE CONTENT IN NADA UNIVERSITY ONLINE
For every piece of learning content that has not yet been purchased users will see an **Add to Cart** button. Only designated Training Administrators and dealers are authorized to purchase.

RUN REPORTS
The Training Administrator has access to the Reports Console inside of NADA University Online. The report functionality provides detailed information on content accessed, started, completed and training progress.

Historically, Training Administrators have been HR personnel, compliance officers or other administrative staff. NADA provides members and subscribers the flexibility to assign a Training Administrator to suit dealership business needs.

MANAGE THE COMPANY ROSTER

The **Company Roster** contains functionally for adding, editing and removing employee profile information from NADA University Online. The roster contains a list of existing dealership employees within NADA's membership system, along with relevant profile information, including the employee's training level designation.

Training Administrators manage their dealership's company roster through www.nada.org.

ACCESSING THE COMPANY ROSTER

Access to the company roster is based on dealership rooftops. To access your dealership's company roster, follow these steps:

Step ①

LOG IN TO NADA.ORG WEBSITE

Go to nada.org, and click the **Login** tab. Enter your Universal NADA Username and Password in the respective text fields and then click the **Login** button. (You can retrieve/reset your password using the links provided or using our online system.)

NOTE: For NADA members with more than one location, there will be separate logins for each rooftop.

Step ②

CLICK EDIT PROFILE

After you log in to www.nada.org, edit your profile by clicking the **My NADA** tab and then clicking the **Edit Profile** button.

Step ③

SELECT THE MANAGE ROSTER BUTTON

Click the **Manage Roster** button to display a list of employees.

MANAGE THE COMPANY ROSTER

ADD NEW EMPLOYEE

From the Manage Roster tab, click the **Add Employee** button. (You may need to scroll to the bottom of the page to find this button.)

Complete the information on the form, including the training level. This training level controls what learning content employees will have access to when they log in to NADA University Online. Click the **Save** button. After you add an employee to the company roster, create the login account and credentials for that employee.

MANAGE THE COMPANY ROSTER

EDIT EXISTING EMPLOYEES

To edit contact information or training levels, from the Manage Roster page, click the **Edit** button next to the employee name. Only the information seen below is editable, including the ability to edit your employees' training level. Changing the training level will affect the enrollment process for the employee upon login. Click **Update Employee**.

REMOVE EMPLOYEE ACCOUNTS

Training Administrators can remove employees no longer working for the dealership. Removing an employee ensures that the person no longer has access to member benefits or other NADA University Online learning content.

To remove an employee, from the Manage Company Roster Screen:

1. Click the **Remove** button next to the employee's name.

2. Confirm the removal by clicking the **OK** button.

CREATE LOGIN ACCOUNT CREDENTIALS

After adding all new employees to the company roster, Training Administrators can create an online account to allow employees to log in to the system. New employees are also added to the company roster upon creating account credentials using the steps outlined in this section.

There are different processes for creating account credentials. One is for dealerships that are NADA members, and the other is for dealerships that are non-members.

CREATE LOGIN CREDENTIALS FOR NADA MEMBERS

This section covers how to create employee account credentials for NADA members. If you are not an NADA member, see creating login credentials for non-members.

Step ①

VISIT THE NADA UNIVERSITY ONLINE WEBSITE

Visit nada.org/onlinelearning and select the link under the sign-in button to **create a new account.**

Step ②

ENTER MEMBER ID

Enter your NADA/ATD Membership ID and select the **Search Account** button.
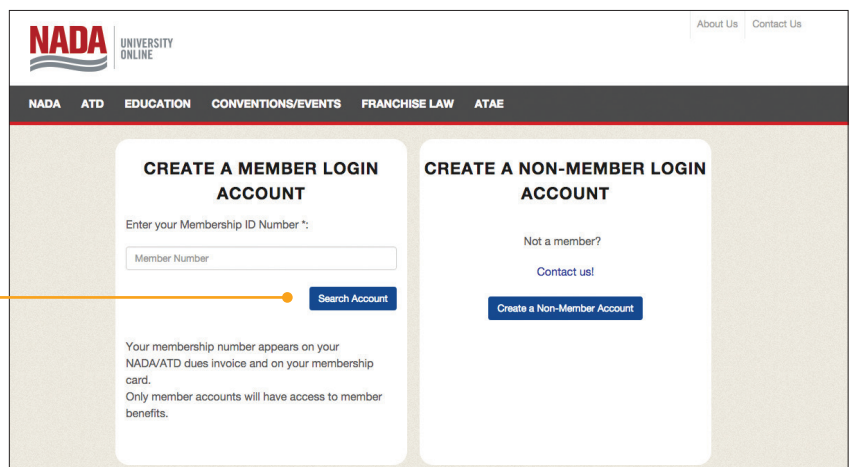
CREATE LOGIN ACCOUNT CREDENTIALS

Step 3

CONFIRM COMPANY

Confirm your company information and select the **Next** button. If the incorrect company is displayed you may retry your search or call 800.557.6232 for assistance.

Step 4

REVIEW EMPLOYEE RECORDS

Review current NADA employee records that display and then choose option 1 or 2:

1. If your name appears, select it and then select the **Next** button and proceed to Step 6.

2. If your name is not listed, select the **Create New User** button.

NOTE: Creating new users here will also add the employees to the company roster.

CREATE LOGIN ACCOUNT CREDENTIALS

Step 5

ENTER/UPDATE EMPLOYEE INFORMATION

Complete the required contact information fields for new individual accounts and select the **Next** button.

Step 6

ENTER NADA UNIVERSAL LOGIN CREDENTIALS

Enter desired NADA universal username and password and select the **Save & Next** button to complete the process.

CREATE LOGIN ACCOUNT CREDENTIALS

CREATE LOGIN CREDENTIALS FOR NON-MEMBERS

This section covers how to create employee account credentials for dealerships that are not NADA members. If you are an NADA member, see creating login credentials for NADA members.

Step 1

VISIT THE NADA UNIVERSITY ONLINE WEBSITE

Visit nada.org/onlinelearning and select the link under the sign-in button to **create a new account.**

Step 2

CREATE A NON-MEMBER ACCOUNT

Click **Create a Non-Member Account** button.
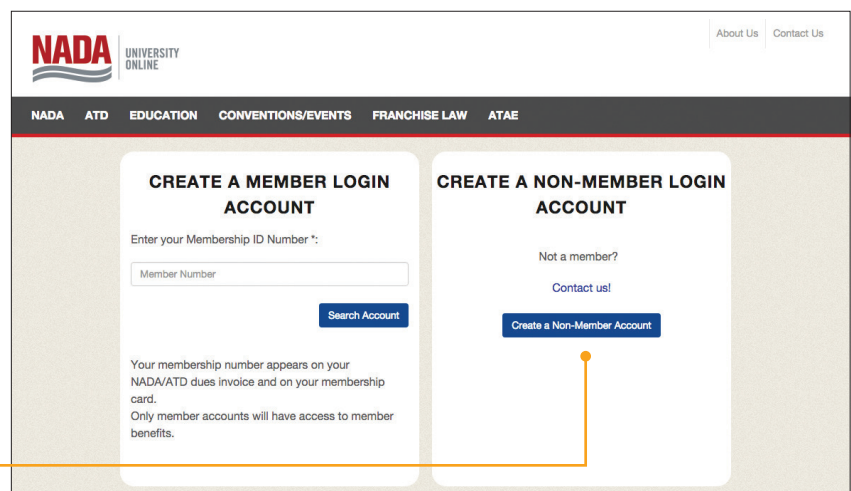
CREATE LOGIN ACCOUNT CREDENTIALS

Step ③

SEARCH NEW NON-MEMBER COMPANY
Enter the company name or partial company name, choose the state/province and then click the **Next** button.

Step ④

SELECT OR CREATE NON-MEMBER COMPANY
Review the company record(s) that display, and then choose option 1 or 2:

① If your company name appears, select it and then select the **This is my company, Next** button and proceed to Step 5.

② If your company name is not listed, retry your search or select the **Create New Non-Member Company** button.

CREATE LOGIN ACCOUNT CREDENTIALS

Step   5

ENTER/UPDATE COMPANY INFORMATION

Complete the required **Company Information** fields and select the **Next** button.

Step   6

REVIEW RECORDS/CREATE NEW NON-MEMBER ACCOUNT

Review current records that display, and then choose option 1 or 2:

1. If name appears, select it and then select the **Next** button.

2. If name is not listed, select the **Create New Non-Member Individual** button.

CREATE LOGIN ACCOUNT CREDENTIALS

Step 7

ENTER/UPDATE COMPANY INFORMATION

Complete the required contact information fields for new individual account and select the **Next** button.

Step 8

ENTER NADA UNIVERSAL LOGIN CREDENTIALS

Enter desired NADA universal username and password and select the **Save & Next** button to complete the process.

TRAINING LEVELS

NADA University Online offers 12 training levels. The training levels correspond to specific job titles and learning topics.

INTRODUCTION

Training Administrators can change the training level for any given employee, at any time, by managing the company roster. Learning content within NADA University Online will change for the end user if the training level is updated on the company roster.

For example, a service advisor who logs into the system would typically have the training level set to Employee – Fixed Operations. Upon login, the user would automatically have access to the learning content based on this designation. When content is purchased by the dealer or Training Administrator, active employees listed on the company roster are automatically enrolled in the content associated with their learning path. The user would automatically see the courses listed in the My Upcoming Training portal after logging into the system for the first time, as depicted in the image below.

TRAINING LEVELS

WHAT TRAINING LEVELS ARE AVAILABLE?

NADA University Online offers the following training levels:

TRAINING LEVEL (Learning Path)	TYPICAL JOB POSITIONS
Dealer*	• Owner of dealership
Dealer Administrator*	• Owner's designee of dealership
General Manager – Executive*	• General Manager • Dealer/Owner/Executive
Professional Advisor	• Dealer legal staff or attorney • CPA/Financial Advisor • ATAE/Association Staff
Department Manager – All Departments	• Controller/CFO • Manager – Education and Training • Manager – Human Resources • Manager – Business Office
Department Manager – Variable Ops	• GSM • Sales Manager • F&I Director
Department Manager – Fixed Ops	• Body Shop Manager • Parts Manager • Service Manager
Finance & Insurance (F&I) – BDC – Internet Managers	• Customer Service Manager • F&I Manager/Director • Internet Manager/Director • Other Manager
Employee – All Departments	• Marketing Manager • OEM Employee • Office Other
Employee – Variable Ops	• Sales Consultant – New and Used
Employee – Fixed Ops	• Parts • Service Advisors • Technician – Service/Body Shop • Warranty Clerk/ Accounts Rec
Employee – BDC/Customer Service/Administrative	• Allied Industry Professional • Applicant • Attorney • Customer Service • Lot Porter • Receptionist • Shuttle Driver

*Ability to purchase content for rooftop

CHANGE AN EMPLOYEE'S TRAINING LEVEL
See Managing the Company Roster *(Employee Account Management).*

COURSES ALIGNED TO TRAINING LEVELS
Training Administrators see learning content organized by each training level in the Training Catalog.

LEARNING CONTENT

NADA University Online delivers complimentary resources for NADA/ATD members and offers subscriptions for premium training content. The following table outlines the content types available at nada.org/onlinelearning.

CONTENT TYPE	COMPLIMENTARY RESOURCES	PREMIUM TRAINING
Driven Management Guides (DMG)	✔	✔
Webinars (WEB)	✔	✔
Workforce Study Reports (RPT)	✔*	
Convention Workshops (WKS)		✔
Interactive Online Courses (IOC)		✔
HR Essentials		✔

*Only available to participating dealerships. Available to purchase for nonparticipating dealerships and allied industry.

COMPLIMENTARY MEMBER BENEFITS

Member benefits include NADA's weekly webinars and highly regarded *Driven* Management Guides.

WEBINARS (WEB)

NADA University Online provides NADA and ATD members on-demand access to recordings of live webinar programs. These 30-minute webinars are presented by industry-leading subject matter experts and focus on solutions to key issues affecting your dealership. Webinar recordings are added within four to six business days of the live presentation and may be viewed for up to two years.

DRIVEN MANAGEMENT GUIDES (DMG)

These highly praised NADA publications cover a wide variety of topics—from legal and regulatory compliance to best practices in parts and service. Managers can use the routing feature to assign *Driven* guides to their staff as required reading. Testing and tracking features help ensure your employees receive the information and are accountable for comprehension.

LEARNING CONTENT

PREMIUM CONTENT

Premium content is learning content that is available for purchase. The Premium Subscription includes all convention workshops, interactive online courses and HR Essentials resources database. For dealerships that are not members of NADA, the Premium Subscription unlocks access to *Driven* Management Guides and webinars. Once content is purchased, it is immediately available.

CONVENTION WORKSHOPS (WKS)

A Premium Training Subscription brings the best of the annual NADA/ATD Convention into your dealership. Subscriptions include two rolling years of convention workshop recordings. Many convention workshops also contain assessments designed to check what knowledge a learner has gained as a result of watching the workshop.

INTERACTIVE ONLINE COURSES (IOC)

NADA's interactive online courses are as close as you can get to hands-on learning. Online courses incorporate real-world simulations and interactivity to increase user engagement and overall knowledge retention. Courses are developed by NADA Academy instructors and incorporate best practices uncovered by NADA 20 Group consultants.

HR ESSENTIALS

Includes fast answers to thousands of everyday HR questions, job descriptions, performance management templates and customizable HR policy handbooks.

ACCESS AND ENROLLMENT TO LEARNING CONTENT

A key feature of NADA University Online is that access to content is automated. For Premium subscribers, enrollment into content is also automated. Training Administrators need only set a training level for each employee by managing the company roster. Upon login, employees will either gain access or be automatically enrolled into content.

The user experience for NADA members and Premium Subscribers is a little different. Once logged in,

1. **NADA Member Employees** are automatically provided access to training content for their appropriate training level. By default, users are not automatically enrolled in content, but the Training Administrators can change this setting. Find out more in the NADA Members section.

2. **Premium Subscribers' Employees** are automatically enrolled in content based on their assigned training level. Content relevant to their training level appears in the My Upcoming Training area of the Personalized Learning Dashboard.

|	ACCESS TO CONTENT	ENROLLMENT IN CONTENT
NADA Members	✔	
Premium Subscribers	✔	✔

LEARNING CONTENT

NADA MEMBERS' EMPLOYEES

The adjacent image shows the default NADA member Personalized Learning Dashboard. Members who have **not** purchased any Premium content are **not** automatically enrolled into content, and therefore do not have any content listed in the My Upcoming Training portlet.

TIP: NADA members who wish for member benefits to appear in the My Upcoming Training portlet can attain this by going through the purchase process. Since content is complimentary for members, there is no cost involved. The system enrolls each employee into content based on the employee's assigned training level.
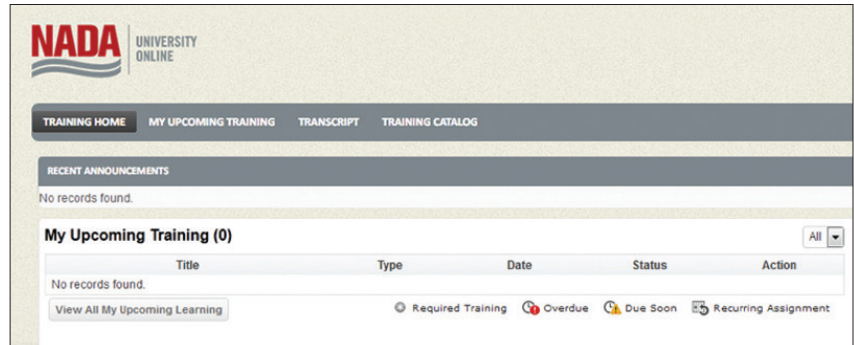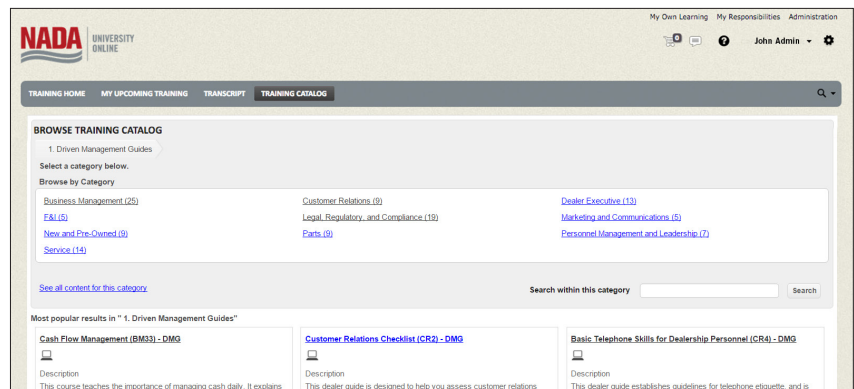

LOCATE NADA MEMBER BENEFITS

Employee must search and then open the content. This requires members to browse or search the Training Catalog.

TIP: Search the Training Catalog using a three-digit code to find member benefits.
- "WEB" – will locate all available webinars.
- "DMG" – will locate all available *Driven* Management Guides.

LEARNING CONTENT

LAUNCH CONTENT

The system automatically recognizes NADA members and will display an **Open Item** button for all member benefit learning content. After an employee opens the member benefit content for the first time, the content will thereafter display on My Upcoming Training. The training level dictates what a NADA member employee can see within the system.

PREMIUM CONTENT *(Purchases)*

Training Administrators who purchase content, such as a Premium Subscription, will automatically enroll their employees into all purchased content based on the assigned training level. Each time an employee logs in, the system checks for changes to the employee training level, and will adjust enrollments accordingly.

The example below shows a first-time login for a *Fixed Operations Employee* for a dealership that purchased the Premium Subscription. Note that the My Upcoming Training list contains 63 enrolled courses.

PURCHASE PROCESS

Training Administrators can make purchases for a dealership. The purchase process automatically enrolls employees into learning content relevant to their assigned training level.

NOTE: The same purchase process described here applies to physical products.

Step ①

LOCATE THE CONTENT ITEM IN THE TRAINING CATALOG

Search the Training Catalog, or browse the available categories to locate the content. NADA University Online displays popular results within each category, as well as the ability to see all content in a specific category. The Training Administrator can view content descriptions while browsing to learn more about each piece of content. Click the **underlined name** of a piece of content to purchase it.
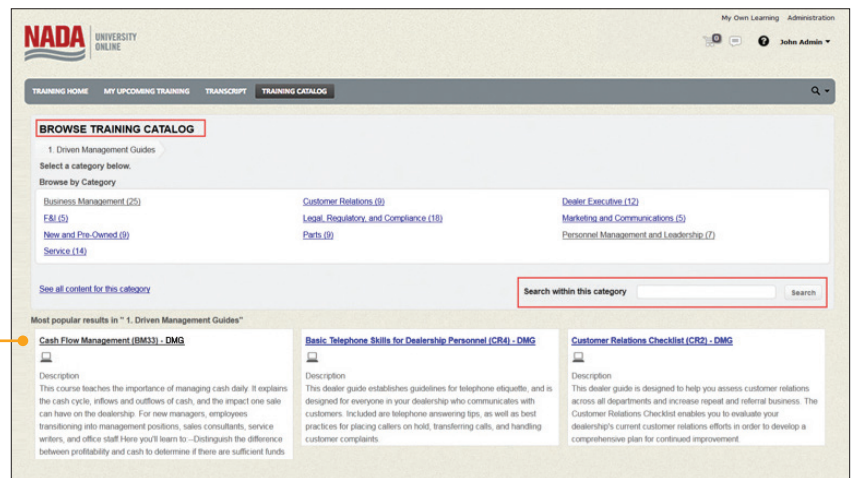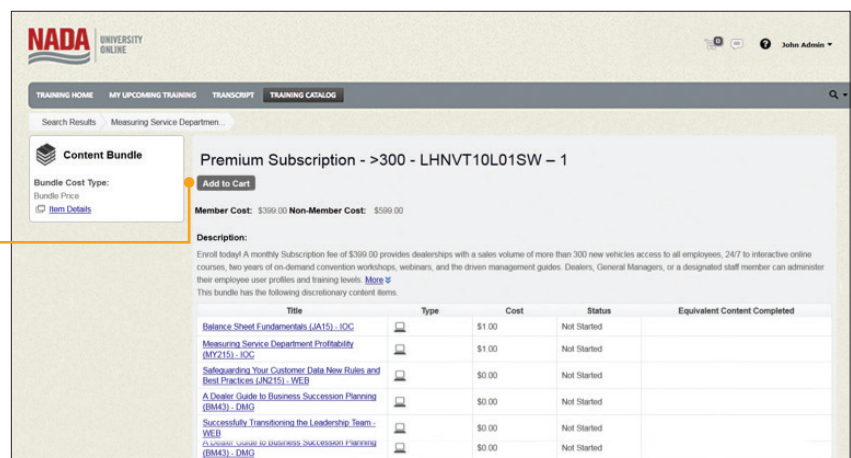
Step ②

ADD CONTENT TO THE SHOPPING CART

After accessing a piece of content, click the **Add to Cart** button.

NOTE: This button only displays for Training Administrators.

PURCHASE PROCESS

Step ③

CHOOSE THE ORGANIZATION

Dealerships that have more than one store will have the option to purchase content for each rooftop. In the example shown, there is only a single dealership. Click **checkbox** next to the dealership for which the content will be purchased for, then click the **Confirm Add to Cart** button.

Step ④

CHECK OUT AND BUY

Click the **shopping cart icon** to **check out**. Follow the on-screen instructions to complete the purchase.

PURCHASE PROCESS

Step 5

ENTER CREDIT CARD INFORMATION

Enter the credit card number and card holder information into the areas provided. Once complete click the **Next** button.

Step 6

COMPLETE THE PURCHASE

On the last screen, click the **Buy Now** button. Upon completion of the purchase process, all existing employees associated with the dealership rooftop are automatically enrolled into training content relevant to the [employee's training level](#).

The system will also automatically enroll newly added employees into training upon the initial login to the system of that employee.

PERSONALIZED LEARNING DASHBOARD

The Personalized Learning Dashboard displays several portlets. The page appears upon login to NADA University Online. The dashboard is unique for each training level. This page displays a top-level navigation menu, and information about the employee's profile. Portlets are small windows into other areas of the system, including Announcements, My Upcoming Training, My Completed Training, Search and FAQs.

Training Administrators will also have an **Administration** link and a shopping cart next to their name.

TRAINING CATALOG
Search for specific learning material with ease.

ADMINISTRATIVE CONSOLE
Set training goals, run reports and create an individual learning roadmap for each employee.

LEARNING PATHS
Auto enrollment in role-specific curriculum, including:

- Body Shop
- Business Office/F&I
- Dealer/Executive
- Digital and Traditional Marketing
- Human Resources
- Legal and Regulatory
- Parts
- Sales
- Service

TRANSCRIPT
View a repository of all test items and scoring notifications.

TESTING AND TRACKING
Keep track of training progress to ensure learning goals are met.

PERSONALIZED LEARNING DASHBOARD

MY UPCOMING TRAINING *(Portlet)*

My Upcoming Training is a list of learning content in which an employee is enrolled. Learning content that displays here is explained in detail in the section Learning Content Access.

- Click the **title of the content** to launch the content and complete the training.

- Click **View All My Upcoming Learning** button to view a complete list of training content.

My Upcoming Training (257)

Title	Type	Date	Status	Action
⊕ Balance Sheet Fundamentals (JA15) - IOC	Online		Enrolled	
⊕ Basic Telephone Skills for Dealership Personnel (CR4) - DMG	Online		Enrolled	
Power of Paper: Compliant, Consistent, and Confident (N31) - 14WKS	Online		Enrolled	
Explore Hot Tax Topics with Industry Experts (N40) - 15WKS	Online		Enrolled	
Advanced Internet Performance Strategies (N02) - 14WKS	Online		Enrolled	

View All My Upcoming Learning   ⊕ Required Training ⊕ Overdue ⊕ Due Soon ⊡ Recurring Assignment

RECENT ANNOUNCEMENTS *(Portlet)*

The Recent Announcements portlet will display information related to:

1. Upcoming system maintenance.

2. New course content as it becomes available.

TRAINING HOME   MY UPCOMING TRAINING   TRANSCRIPT   TRAINING CATALOG

RECENT ANNOUNCEMENTS

August 2015 On-Demand Webinars Available   9/3/2015
As a reminder, if you missed our weekly live webinars, feel free to catch up and watch them on demand. The following events were part of our August weekly webinar series. How to Avoid N...

New and Updated Driven Management Guides from NADA   9/1/2015
NADA University Online has two new Driven guides on automotive CRMs, and attracting more customers to your dealership. There is also an update to the Driven guide on the Family Medical Leave Act....

More... »

PERSONALIZED LEARNING DASHBOARD

MY COMPLETED TRAINING
(Portlet)

The My Completed Training portlet allows employees to track their progress within the past 30, 60 or 90 days. The **View Certificate** button is selected by an employee for printing or saving as a PDF file.

See the section Certificate of Completion for more information on how learners successfully complete each type of content.

My Upcoming Training (257)				All ▾
Title	Type	Date	Status	Action
⊕ Balance Sheet Fundamentals (JA15) - IOC	Online		Enrolled	
⊕ Basic Telephone Skills for Dealership Personnel (CR4) - DMG	Online		Enrolled	
Power of Paper: Compliant, Consistent, and Confident (N31) - 14WKS	Online		Enrolled	
Explore Hot Tax Topics with Industry Experts (N40) -	Online		Enrolled	

SEARCH AND BROWSE BY CATEGORIES *(Portlet)*

Search content within this porlet or browse the number of categories available for learning content relevant to each employee training level. Enter a **keyword or phase** into the search box, then click the search icon to display results. Alternatively, click the **categories** available for learning content available for the user that is logged into the system to display additional details about content within that category.

SEARCH

Any words ▾ 🔍

BROWSE CATEGORIES

1. Driven Management Guides (67)
2. Dealer-Executive (156)
3. Parts (37)
4. Service (53)
5. Body Shop (15)
6. New and Pre-Owned (63)
7. "F&I" Finance and Insurance (19)
8. Marketing and Communications (75)
9. Human Resources (30)
ATD (Commercial Trucks) (74)
Convention Workshops (130)
Premium Subscriptions (2)
Workforce Study Products (6)
Workshops TO GO - Individual DVD's and USB's (129)
Workshops TO GO Packages (6)

TRAINING CATALOGS

NADA University Online delivers hundreds of pieces of content. Available training catalogs help users in searching and sorting content of interest.
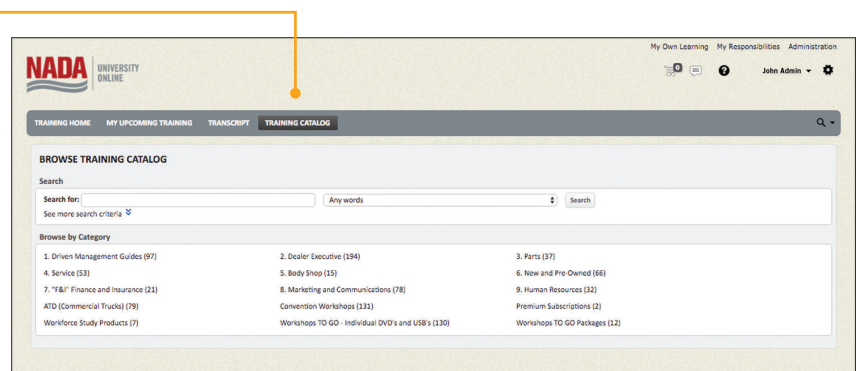
TRAINING CATALOG

A complete list of NADA University Online content is available at universityonline.nada.org/trainingcatalog. Easily filter by checking the content of interest and clicking **Search**.

For each search result, a user can click the **View** button next to a piece of content to access it. The user will be prompted to log in to view the content. After login, if an employee does not have an assigned training level, a message displays advising the employee of the next steps.
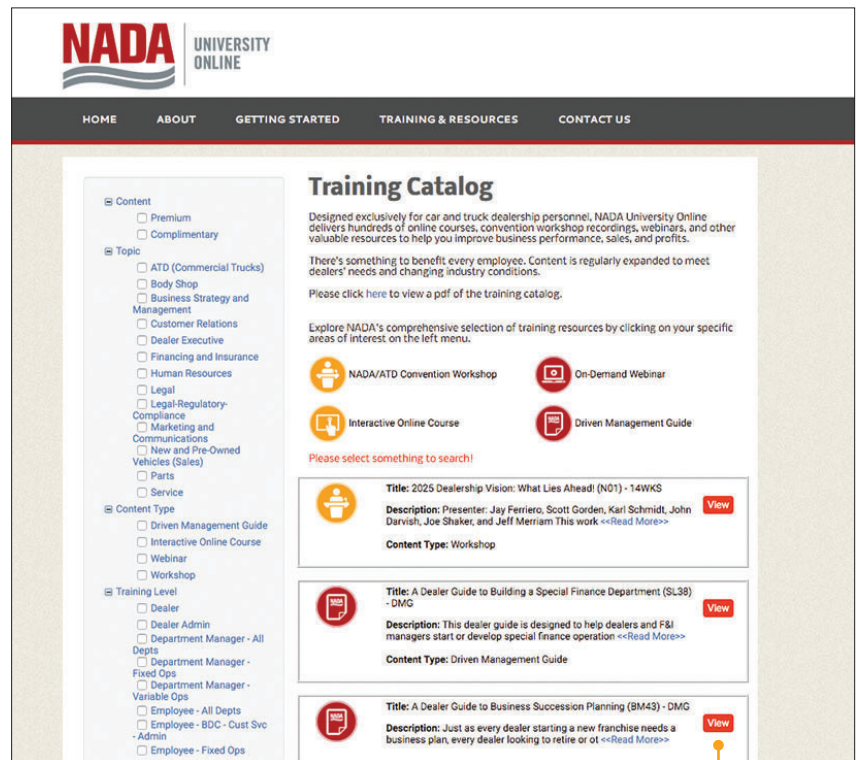
PERSONALIZED TRAINING CATALOG

Once logged into NADA University Online, a user will have access to a personalized training catalog that will display only the content available to his or her specific training level. To access the catalog simply click the **Training Catalog** button in the navigation menu.
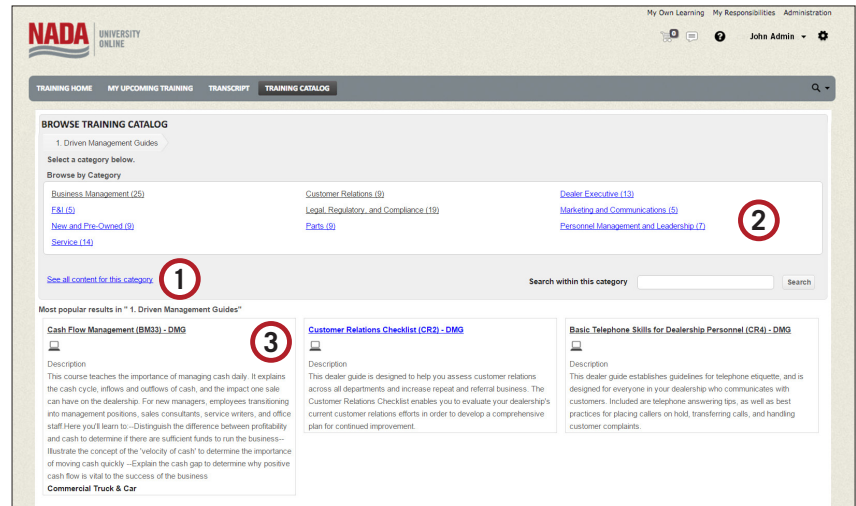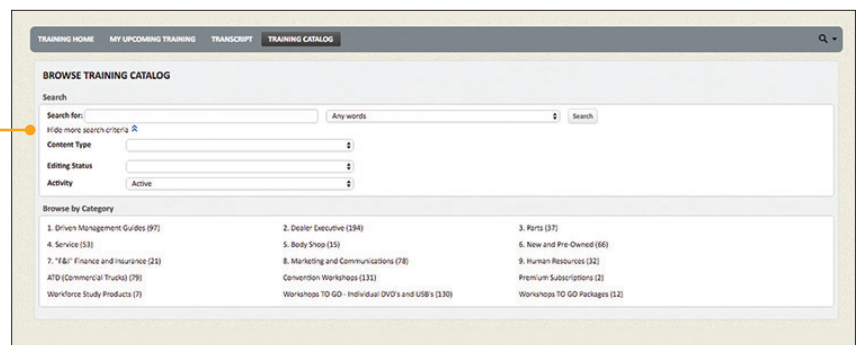
TRAINING CATALOGS

BROWSE BY CATEGORY

A number of categories are available for learning content relevant to each training level. Click any category name to see learning content available for the user who is logged into the system. Three options for display are available:

(1) All content in this category.

(2) Additional sub-categories for additional drill-down.

(3) Popular content dynamically displays at the bottom of each category, with the top three results for each category.

SEARCH

At the top of the training catalog is a section for searching. Click the **See more search criteria** link to expand additional options for searching. These options vary depending on permissions.

TRAINING CATALOGS

SEARCH *(continued)*

Type in your text in the **Search for** box, select an option from the search menu and then click **Search**. **Content closest** to the search may display and can be clicked on.

The system provides **options** for searching within the results. After locating content, click the name of the content to display more information.

After selecting the item, more information displays, such as whether item **can be opened** (if applicable) or information on **purchasing the item.**

TRACKING, TESTING AND REPORTING

Accountability is crucial to achieving peak performance. This key system functionality allows the Training Administrator to track, measure and monitor each employee's training status in real time. Transcripts are also available to individual users for their own training progress.

TRACKING

NADA University Online tracks and displays the employee status for each course as follows:

① **Enrolled** – Once content is purchased or accessed, the status of the course will display as **enrolled.**

② **Started** – Once a course is opened for the first time, the status changes to **started**.

③ **Completed** – This varies depending upon the course. Typically, a course is **completed** with successful completion of an assessment, knowledge check or simulation, with an 80 percent or better.
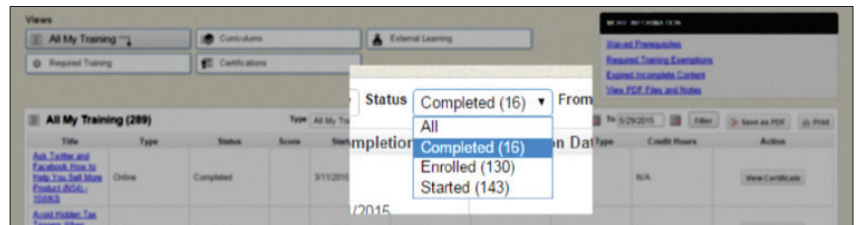
TESTING

To empower dealerships with employee accountability, nearly every course in NADA University Online contains an assessment, or test. Employees who successfully complete the assessment, knowledge check or simulation will be provided with a certificate of completion.

NOTE: Interactive courses will typically require passing a simulation activity or knowledge check at periodic intervals within a course. In addition to a status change, NADA University Online tracks employee performance on tests.
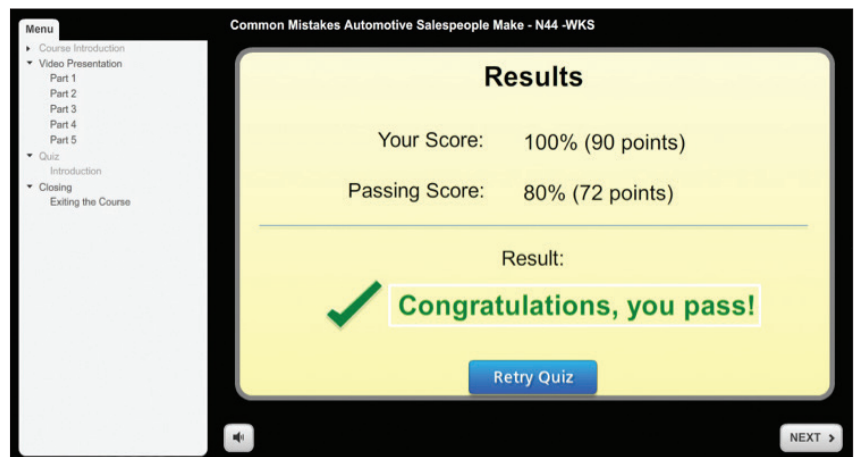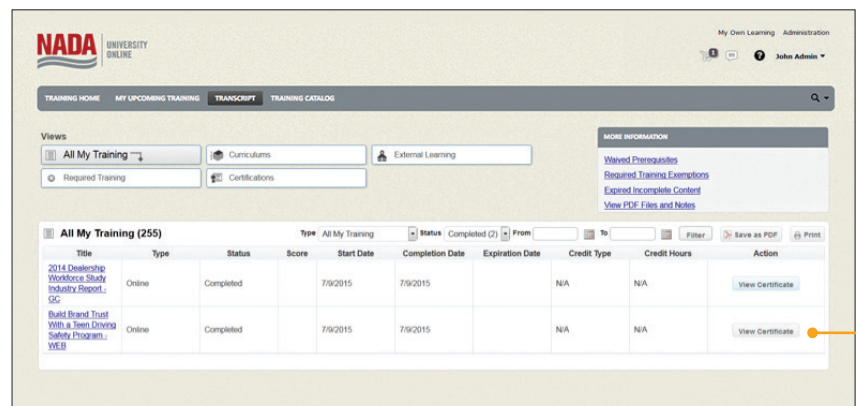
TRACKING, TESTING AND REPORTING

CERTIFICATE OF COMPLETION

Upon successful completion of a course or content review, each employee will receive a certificate of completion. Successful completion means something slightly different depending on the type of course or content the learner is completing. The following table depicts that variation.

CERTIFICATE ISSUED WHEN...	WEBINARS (WEB)	DRIVEN MANAGEMENT GUIDES (DMG)	WORKSHOPS (WKS)	INTERACTIVE ONLINE COURSES (IOC)	WORKFORCE STUDY REPORTS (RPT)
Learner finishes watching or reviewing content. The system automatically marks complete.	✔	✔	✔		
Learner successfully completes a summary assessment at 80% or better, and the system automatically marks complete and records a score.		✔	✔*	✔	
Learner successfully completes an interactive simulation or other type of knowledge check.				✔	
Learner finishes reviewing content and manually marks the course content complete.					✔*

Course/content may not contain a summative assessment at the end.

Employees who want to print their certificate can click the **View Certificate** button on the Transcript page next to the completed course in the Action column. The certificate downloads to the user's local computer and opens in Adobe Reader, a free software available from Adobe's website and installed on most machines.

TRACKING, TESTING AND REPORTING

EMPLOYEE TRANSCRIPT

Employees are able to run their own individual transcript, which includes:

1. **Filtering and sorting of enrolled, started or completed transcript record**. To filter content, choose a Type or Status, or enter "from" and "to" dates, then click the **Filter** button. To sort content, click on one of the column headers.

2. **Exporting it as a PDF file** – Click the **Save as PDF** button to open the transcript file in Adobe Reader.

3. **Printing the transcript** – Click the **Print** button to open a printer-friendly version of the transcript.
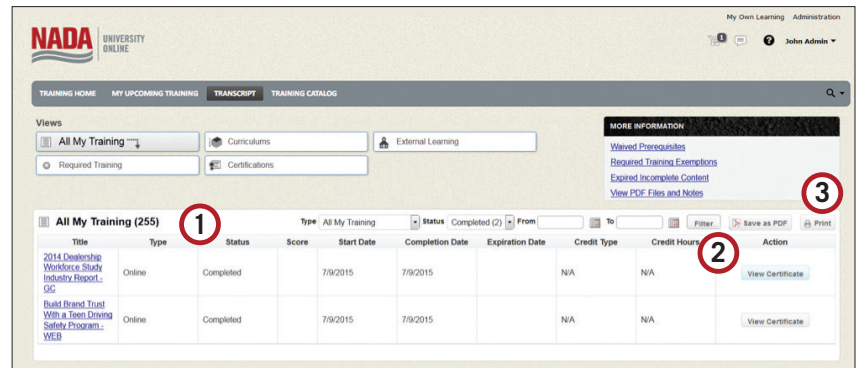
REPORTING

A variety of reports can be run that provide real-time tracking of employee progress. This section covers the reports available, as well as procedures for running the reports.

AVAILABLE REPORTS

A number of reports are available within the system related to user rating of course content, training progress and more. Some reports are available for every user logged into the system, and others are available for the Training Administrator through the reports console. The following table summarizes each report.

REPORT TITLE	REPORT TITLE	WHO CAN SEE THE REPORT?
My Content Access	View information about content items that you accessed, including completion information.	Every user
My Purchases	View purchases you made, and information about them.	Every user
My Required Training	For dealerships that assign training to employees, using the Required Training Console, this report allows employees to view information about these assignments.	Every user
My Training Progress	View your training progress information, including score (if available). Detailed information is available through a drill-down report.	Every user
My Transaction History	View information about orders that you placed. Click an order number within the report to view details about that order. More information is available through drill-down reports.	Every user

TRACKING, TESTING AND REPORTING

| REPORT TITLE	REPORT TITLE	WHO CAN SEE THE REPORT?
Course and Content Ratings	See courses and content items according to their rating. Employees can rate courses from 1-5 stars.	Training Administrator
Organization Cost Summary	See the cost that users who are members of the selected organization(s) actually paid for content, grouped by content type.	Training Administrator
Organization Listing	See users who are members of the selected organization(s) or dealerships.	Training Administrator
Organization Report – Content Access	View information about content items that users accessed, including completion information.	Training Administrator
Organization Report – Purchases	View a list of users and the purchases that each user made. Purchase history is available through a drill-down report.	Training Administrator
Organization Report – Required Training	View information about required training assignments (past and current training periods) for users. "Current" means incomplete training periods for which the start date has passed, but the due date has not passed. Detailed information for each user's assignments is available through a drill-down report	Training Administrator
Organization Report – Required Training Assignments by Content Item	Select a content item and view the current required training assignments for that content item. "Current" means incomplete training periods for which the start date has passed, but the due date has not passed. If a user has multiple required training assignments for the content item, then they will appear in the report multiple times.	Training Administrator
Organization Report – Required Training Periods by User	Select a user and view information about all of their training assignment periods, regardless of completion status or deadline.	Training Administrator
Organization Report – Training Progress	View training progress information for users, including score (if available). Detailed information is available through drill-down reports.	Training Administrator
Organization Report – Transaction History	View information about orders that users placed. Click an order number within the report to view details about that order. More information is available through drill-down reports.	Training Administrator
Purchase History by Content	See how much each user paid for a specific content item during a specified period of time.	Training Administrator
Recent User Access	See a list of users who recently accessed the site.	Training Administrator
Repeat User Access	See users who have accessed the site the most.	Training Administrator
Summary Report – Organizational Progress	An overview of training progress – listed by organization – for all users who have enrolled in, started and completed content such as courses.	Training Administrator
Summary Report – Training Progress by Organization	An overview of training progress – listed by training item – for all users within the selected organization(s), showing (per content item) the number of enrollments, starts and completions, for online courses, classroom courses, tests and curriculums. Filtering by training type is available.	Training Administrator
Training Progress by Content	Search for and select content items, such as curriculums or online courses, and then view user progress for the selected content item.	Training Administrator
Training Progress by User	Select a user and view their progress for curriculums, online courses, etc.	Training Administrator

TRACKING, TESTING AND REPORTING

MY REPORTS
(How Employees Run Reports)

Many of the report names begin with the word "My," and these reports contain information relevant to the individual logged into the system. These reports are available in the Reports Console for each employee. Employees access these reports by clicking on their name on the top right corner of the page and then clicking the **My Reports** option that appears.
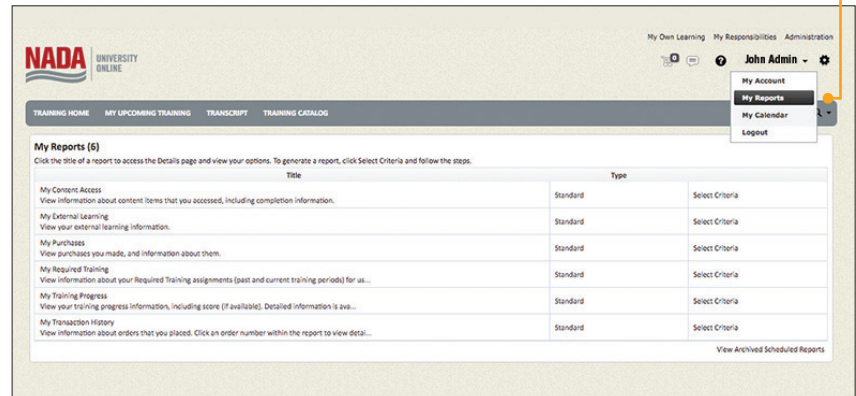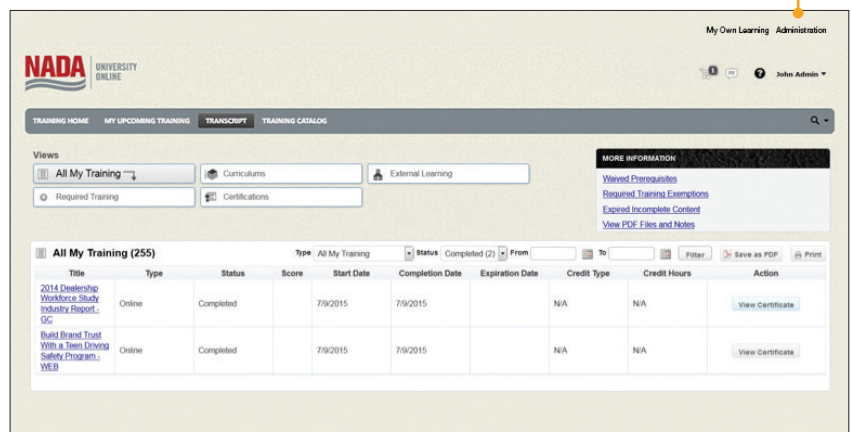

RUN REPORTS IN THE REPORTS CONSOLE

Training Administrators are provided access to the Administration tab, located near their name on the top right corner of the page, which allows them to run a variety of reports. This section provides step-by-step instructions on running a report from the Reports Console.

Step (1)

ACCESS THE ADMINISTRATION
Upon login to NADA University Online, click the **Administration** link to access the console.

TRACKING, TESTING AND REPORTING

Step ②

CLICK THE REPORTS CONSOLE

The Reports Console is the area where the Training Administrator can run a variety of reports, such as learner access, training progress and training content access. Click the **Reports Console** link to access the console.

Step ③

LOCATE THE REPORT

Click the **Search** button to browse through the list of available reports.

In the example, we are looking for training progress and have narrowed the available reports by:

① Typing in search text.

② Clicking the search button.
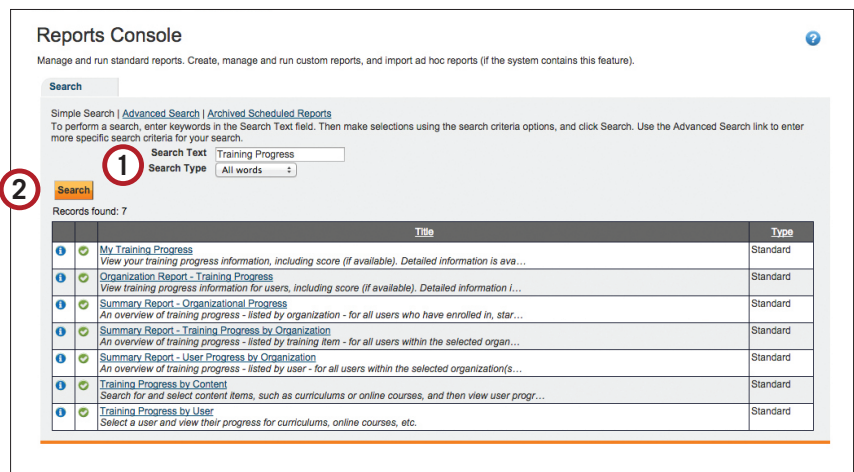
Step ④

CLICK THE SELECT BUTTON

Click the **Select** button.

TRACKING, TESTING AND REPORTING

Step ⑤

CHOOSE YOUR REPORT CRITERIA

Leave all options blank to display all training progress. If you would like to narrow your selection, choose the criteria options based on the descriptions provided in the diagram below.

NOTE: Report criteria will vary depending upon the report that is selected.

Organization Report - Training Progress

Run Report

Use the form below to indicate the parameters for the report you want to run. Then click Run Report to run the report (opens in a new window).

Organization [_____] Select Remove selected organization
☐ Include sub-organizations
User Activity [Active ⬍]
Progress Status [____⬍]
Training Type ☐ Certification
☐ Classroom
☐ Curriculums
☐ Online
☐ On-the-Job Training
☐ Test
Start Date [_____] 🗓 12:00 AM
End Date [_____] 🗓 Midnight
Records (per page) [25 ⬍]
Layout [Default ⬍]

Run Report

Return

- **ORGANIZATION**
  Training Administrators who are associated with more than one rooftop may wish to select a specific dealership in the **Organization** field. Click the **Select** link to choose the name of a specific dealership or leave it blank to review all dealerships.

- **USER ACTIVITY**
  By default, the report will only look at active users. Users who have been removed from the company roster will not display if the user activity is not changed to inactive. Leave this blank to see both active and inactive employees.

- **PROGRESS STATUS**
  Choose an option if you wish for the report to display only a specific progress status.

  - **Enrolled** – All dealership employees are enrolled into purchased content upon login to the system for the first time. Employees who have never logged in will not be enrolled; nor will they display on the report.

  - **Completed** – When a learner successfully completes a quiz or marks an individual course or content item complete, the progress status changes to "completed."

  - **Started** – When a learner opens a course or content item for the first time, the progress status changes to "started."

- **TRAINING TYPE**
  NADA University Online recommends not choosing an option.

- **START DATE**
  If only a specific timeframe is of interest, choose the start date; otherwise, the report will display from August 2010 to the present.

- **END DATE**
  If only a specific time frame is of interest, choose an end date; otherwise, the report will display activity until the current date.

- **NUMBER OF RECORDS** *(PER PAGE)*
  Choose how many records to display per page.

- **LAYOUT**
  You may change this selection at any time. Some reports may be configured with multiple layouts. If so, additional options display from this pull down.

TRACKING, TESTING AND REPORTING

Step   ⑥

CLICK RUN-REPORT BUTTON

When finished, click the **Run Report** button.

NOTE: You may need to adjust pop-up blocker settings on your browser. See Technology Considerations at the end of this guide to learn how.

Organization Report - Training Progress

Run Report

Use the form below to indicate the parameters for the report you want to run. Then click Run Report to run the report (opens in a new window).

Organization   Select Remove selected organization
☐ Include sub-organizations
User Activity   Active
Progress Status
Training Type   ☐ Certification
☐ Classroom
☐ Curriculums
☐ Online
☐ On-the-Job Training
☐ Test
Start Date   12:00 AM
End Date   Midnight
Records (per page)   25
Layout   Default

Run Report

Return

Step   ⑦

WAIT FOR THE REPORT TO LOAD

The "Loading" icon will display until the report is generated. Depending on the number of employees and courses that are associated with the dealership, the report could take some time to finish loading.

...Loading...
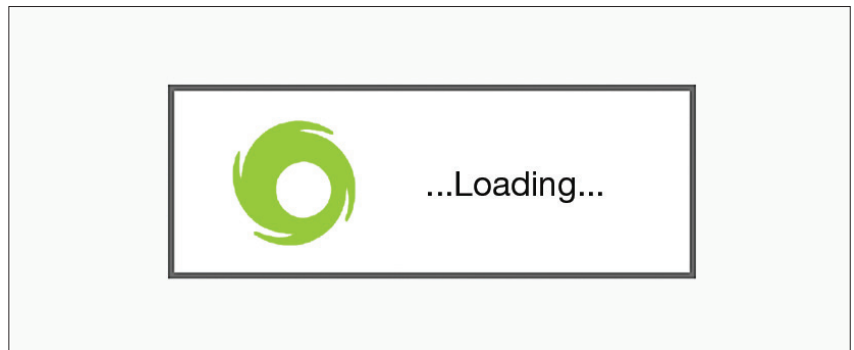
TRACKING, TESTING AND REPORTING

VIEW YOUR REPORT

In the example, the report Organization Report – Training Progress is shown. The top of the report displays important information about the criteria chosen in the report. Additional options are available, including the ability to sort or filter the results.

By default, this report includes: each user's name, the name of the course, the enrollment date, start date, completion date, progress status, score (if applicable) and additional report options. Additional columns of information are available and can be added to the report by clicking the **Layout** button.

PRINT AND EXPORT OPTIONS

Click the **Print** option to send the file to your printer.

- **Excel** – Click the **Export to Excel** option if you wish to have a spreadsheet containing the information that displays on the page. Once you click the Excel link, a spreadsheet will download to your local computer. Excel allows easy sorting and filtering of the results, as well as printing options.

- **PDF** – Click the **Export to PDF** option if you wish to have a nicely formatted, printable copy of the report. Depending on the web browser in use, the PDF file will either download to the desktop or open within the web browser window.

NOTE: This option requires that you have Adobe Reader, which can be downloaded from Adobe's website for free.

REQUIRED TRAINING CONSOLE

The Required Training Console allows dealerships to assign specific content to employees, letting them target specific training to meet individual training needs. The course appears on the employee's Personalized Learning Dashboard in the My Upcoming Training portlet with a notation of the required training. Depending on the type of required training selected, a due date also displays. Email triggers can be selected via a custom training profile.

TYPES OF REQUIRED TRAINING

NADA University Online offers two basic types of required training, referred to as training profiles. One type of profile assigns content without a deadline, and another type assigns content with a deadline. The My Upcoming Training portlet displays required training ahead of other training, and denotes whether the training is required. Training profiles with deadlines display those due dates.

Other profiles can be developed for NADA members or premium subscribers. If you need any custom profiles, please contact the NADA Customer Service Team.

ASSIGN REQUIRED TRAINING

To assign required training to an employee(s), navigate to the Required Training console.

Step ①

NAVIGATE TO THE ADMINISTRATION CONSOLE

Click the Administration link located in the top right of the training homepage to access the **Administration Console**.
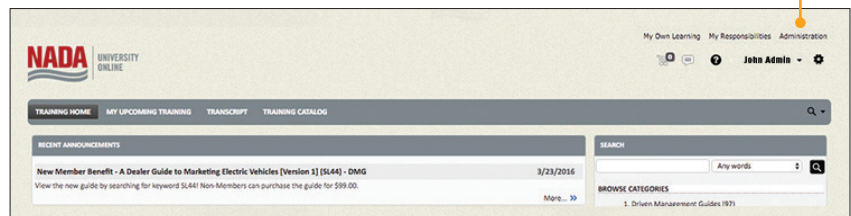
REQUIRED TRAINING CONSOLE

Step ②

SELECT REQUIRED TRAINING CONSOLE

Locate and click the **Required Training Console** link.
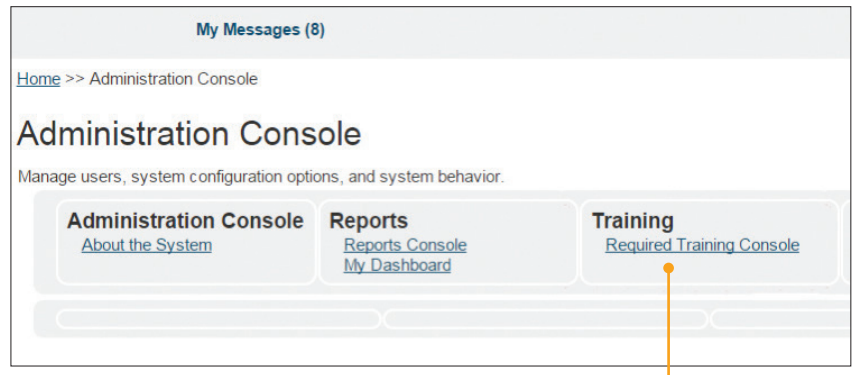
Step ③

LOCATE AND SELECT THE REQUIRED COURSE

First, search to locate your course, then select the required course.

① Click the **Search** button to locate all content or narrow your results by typing in **Search Text.**

② In the Action column, click the **Go** button to select the course for Required Training.
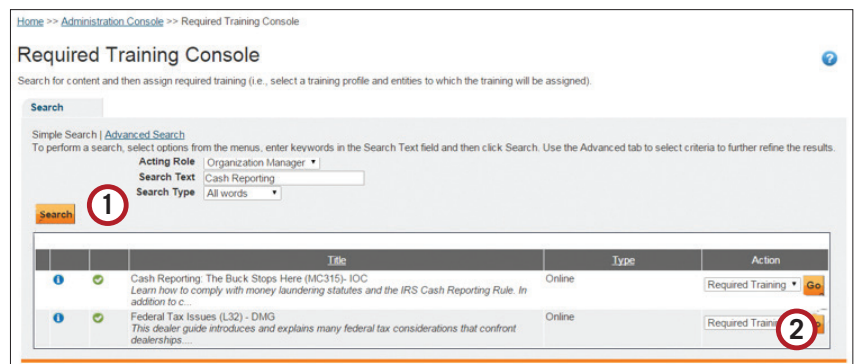
REQUIRED TRAINING CONSOLE

Step ④

SELECT THE TRAINING PROFILE
Select the training profile desired.

① To assign training without a deadline, select **Assign Training Without Deadline** from the pull-down menu, then click the **Go** button.

② To assign training with a deadline, choose **Select Profile** from the pull-down menu to choose a custom training profile, and then click the **Go** button. (See the section Assigning Training With Deadlines for more info.)

Step ⑤

SEARCH AND SELECT EMPLOYEE(S)
Select the training profile desired.

① Click the **Search** button to display all employees in the organization, or use the Last Name and First Name fields to search for a specific employee.

② Select an employee(s) by placing a checkmark to the left of their name.

③ Click the **Assign Training** Button.

The required training will now display on the assigned employee's My Upcoming Training portlet.

REQUIRED TRAINING CONSOLE

CUSTOM TRAINING PROFILES
(Assigning Training With Deadlines)

Customized dynamic training profiles allow dealerships to assign required training with due dates and have the system send email reminders to employees. When selecting a training profile (with a due date), click the **Search** button to display a list of all available custom profiles.

Before using the profile, click the **small blue information icon** next to the desired custom profile to learn more about how it has been set up. Information will display about the reminder email triggers, training period type, initial due dates and recurrences.

If your dealership wishes to have a custom training profile created for use in NADA University Online, please reach out to NADA Customer Service to discuss your requirements. Customer Service will be happy to create a profile to meet the needs of your dealership.

REQUIRED TRAINING CONSOLE

EMAIL REMINDERS

Training profiles that contain email reminders will send customized text to learners reminding them of upcoming training assignments. The email reminder is sent to employees automatically and comes directly from the Training Administrator who assigned the required training. A copy of each email sent to employees is also sent to the Training Administrator. See the email template below for your reference.

From: LoggedInUserEmail
To: RequiredTrainingAssignedUserEmail
CC: RequiredTrainingAssignedUserAssigneeEmail
Subject: Required Training Assignment Deadline Approaching: {%ContentTitle%}
Importance: High

Message: Dear {%RequiredTrainingAssignedUserFirstName%} {%RequiredTrainingAssignedUserLastName%},

The deadline for a required training assignment is approaching. The following training has been assigned to you:
Content Title: {%ContentTitle%}
Content Type: {%ContentType%}
Content Activity: {%ContentActivity%}
Training Period: {%RequiredTrainingPeriodStartDateTime%} - {%RequiredTrainingPeriodEndDateTime%}

Please note the deadline for completion is {%RequiredTrainingPeriodEndDateTime%}. Please log into NADA University Online at http://universityonline.nada.org/ to complete this assignment.

If you have any questions regarding this training assignment, please let me know.

Thank you!

{%RequiredTrainingAssignedUserAssigneeFirstName%} {%RequiredTrainingAssignedUserAssigneeLastName%}

REQUIRED TRAINING CONSOLE

CANCEL REQUIRED TRAINING

In the event a course was set up as a required training in error, the required training can be canceled. To do so, access the required training console, locate the course and then locate the employee's name. Select the employee name and then click the **Cancel Assignment** button.

REQUIRED TRAINING REPORTS

There are five reports available for Training Administrators that provide the information about all employees' required NADA University Online training activity. To learn more about how to run the reports, see reporting. When searching for reports, type in the phrase "Required Training" to see the full list of available reports.

TECHNOLOGY CONSIDERATIONS

NADA University Online course content is designed to support the widest possible technology infrastructures. The courses are published in multiple formats, so when users launch courses, several checks are in place to allow them optimal viewing based on the device and web browser in use.

- Learners will see the Flash version of a course, if their browser supports it.

- If learners are using iPads or Android tablets with an HTML5-compatible web browser, the course will launch in their mobile browser; otherwise, the course will launch in the Articulate mobile player.

- If learners are using a browser without Flash, they'll see the HTML5 output.

WEB BROWSER AND ADOBE FLASH

It is important to use the right web browser when accessing NADA University Online. NADA recommends using the latest version of Chrome, Firefox or Safari with the latest version of the Adobe Flash plug-in installed. However, if the Flash plug-in is not installed, NADA recommends using the following web browsers that conform to HTML5 standards.

	Windows (10, 8/8.1, 7, Vista)	Mac (OS X-10.6 and later)	iOS (iPhone/iPad)	Android
Chrome	✔	✔	✔	✔
Firefox	✔	✔	✔	✔
Safari	✔	✔	✔	

Internet Explorer with Adobe Flash installed works in nearly every area of NADA University Online. However, at the present time, Internet Explorer is not supported. There are a few reasons behind this decision:

- It has a less-than-optimal HTML5 compatibility score compared with other browsers.

- Some pieces of content have less-than-desirable behaviors when used with Internet Explorer.

- Some courses do not pass our internal quality-assurance checks when using Internet Explorer.

- Microsoft recently released Windows 10, and announced the phaseout of Internet Explorer. It will be replaced with the new Microsoft Edge web browser in future versions of Windows.

TECHNOLOGY CONSIDERATIONS

MOBILE DEVICES

HTML5-compatible web browsers are also recommended for mobile devices and tablets. The latest versions of Chrome, Firefox or Safari greatly vary depending on what is available for download on your individual device. The latest versions tend to be more HTML5-friendly.

POP-UP BLOCKER

Courses and reports will display in pop-up windows, which requires disabling the pop-up blocker available in modern browsers. Use the links below for the latest procedures on disabling the pop-up blocker in your browser of choice.

- Firefox – https://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting
- Explorer – https://support.microsoft.com/en-us/kb/909604
- Chrome – https://support.google.com/chrome/answer/95472?hl=en
- Safari – https://discussions.apple.com/thread/4998135?tstart=0

ADOBE READER

Certificates of Completion, Employee Transcripts and Exporting Reports require you to have Adobe Reader installed on your computer. Go to https://get.adobe.com/reader/ to download the free software.

INTERNET CONNECTION

NADA University Online courses are designed with mobile in mind. Course content loads very quickly at 3G and 4G speeds. It is important to have a consistent and reliable Internet connection for the duration of each course.