

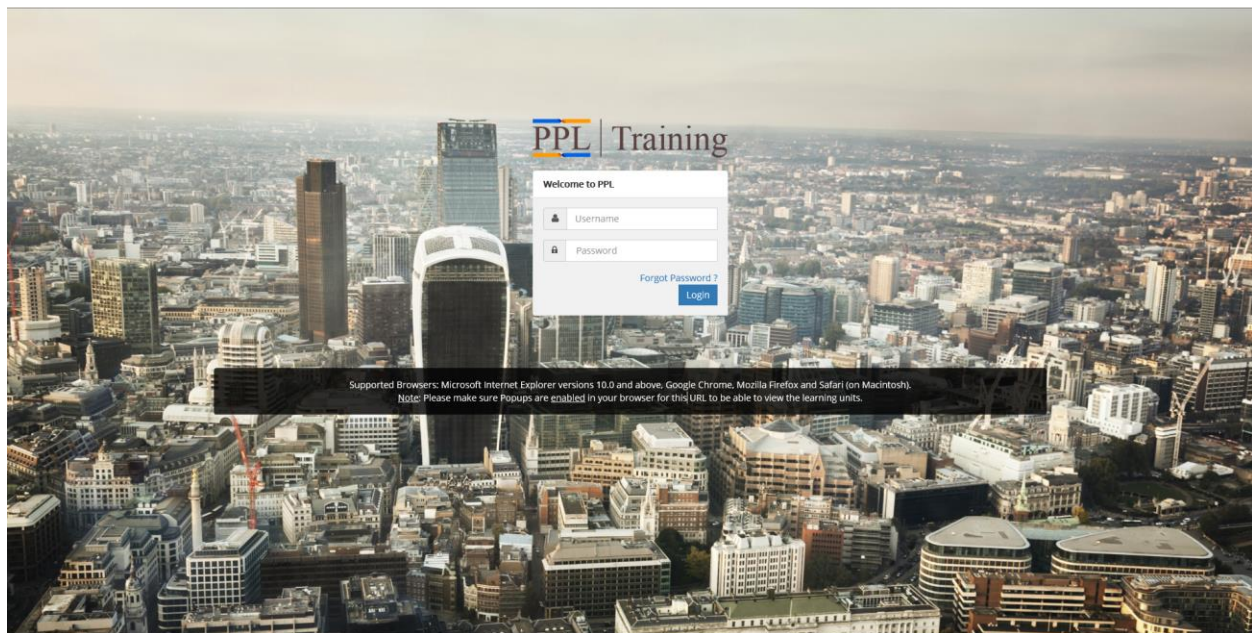
PPL Learning Management System (LMS) – Organisation Administrator Guide

1. Introduction

The purpose of this document is to provide the administrator with guidance on how to monitor the online PPL learning undertaken internally within their organisation using the PPL Learning Management System (PPL LMS). This guide will include information on how to add users, assign training modules to users, and how to produce reports on the online PPL training and tests taken.

2. Logging in as an Organisation Administrator

- The URL to access the PPL LMS is <http://ppltraining.ebix.com>
- Each organisation will be provided with an organisation administrator login details by PPL
- This account should only be used by people with the role of monitoring the PPL Learning within their organisation. **Note:** It is not a User account.
- The password that you are provided by PPL is a generic password. The administrator will be required to change the password when they log in for the first time.



Note: If at any stage you forget your Organisation Administrator credentials to log into the PPL Learning Management System then please contact: pplmshelp@ebix.com .

3. Dashboard

Once logged in, the Organisation Administrator is taken to a Dashboard screen.

Note: This is a high-level visual dashboard to monitor the learning being taken in the PPL LMS at a glance across the catalogue of training modules within your organisation.

Learning Progress				
Module Name	Total Users	Passed	Failed	In Progress
Underwriter General	49	0	0	3
Underwriter Quotes	49	0	0	1
Underwriter Firm Orders	49	0	0	2
Underwriter Facilities	49	0	0	1
Underwriter Firm Orders Advanced	49	0	0	2
Underwriter Endorsements	49	0	0	1
Underwriter User Guide	49	0	0	0

The columns displayed are:

Module Name – A list of the training modules available (these are tailored on whether it is a Broker or an Underwriting organisation)

Total Users – The total number of users that are on the PPL LMS within your organisation

Passed – The total number of users within your organisation that have passed the test for the relevant module

Failed - The total number of users within your organisation that have failed the test for the relevant module

In Progress – The total number of users within your organisation that are progressing their way through the learning units in a module, but have not attempted the test

Note: The data displayed in the table has hyperlinks that enable you to drill down to see more detail in the Module Access Report (see Module Access Report - page 7).

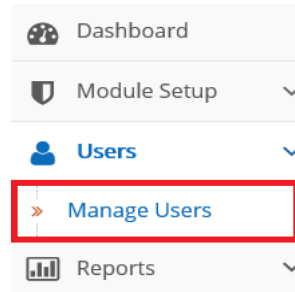
At the top right-hand corner of the screen is another small dashboard that will allow you to see the number of users within your organisation that have accessed the PPL LMS:



Select either the link 'Underwriters' or 'Brokers' relevant to your organisation, and this will allow you to drill down to see more detail in the LMS Access Report (see LMS Access Report – page 6).

4. Managing Users

- Select **Users > Manage Users** on the left-hand side of the screen

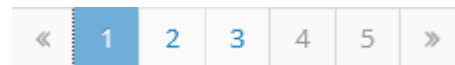


- The grid displayed at the bottom of the table will list down all the people within your organisation that have access to the PPL LMS

Editing a User

There may be a requirement to edit a user if their details need to be amended i.e. surname or possibly if they have left the organisation and you wish to give them an 'Inactive' status.

- In order to search for a learner you can either use the screen numbers:



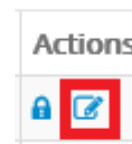
Or

- Enter the name of the user in the search box and select:



Note: It is also possible to do a part search by first or last name if this makes the search easier

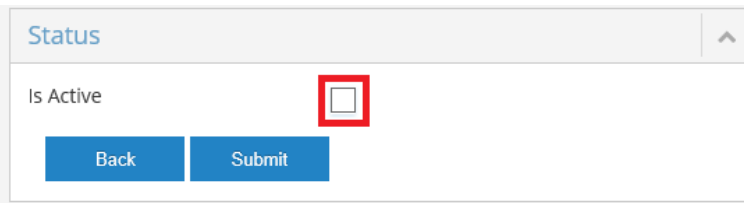
- Once you have located the user that you want to edit select the button highlighted in red (to the right):



- Edit the information as required and confirm by selecting:





Note: In order to indicate that the user has left the organisation then untick the checkbox below:



Adding a User

The Organisation Administrator has the capability of adding users to the PPL LMS.

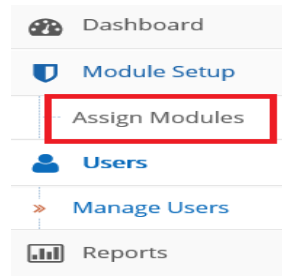
- Select **Users > Manage Users** on the left-hand side of the screen and then 
- Any field with a * is a mandatory field
- **First Name** – Enter the first name of the user
- **Last Name** – Enter the last name of the user
- **Login Id** – This should be a unique id for the user (Recommended to enter the email address)
- **Password** - This will be a generic password, which the user will need to change on first login. The Password needs to fulfill various requirements.
- **Display Name** - Enter First Name and Last Name
- **Email Address** – Enter the email address of the user
- There is no requirement to add in 'Address Information'
- **User Type:** Choose 'Broker' or 'Underwriter' depending on your organisation.
Note: Trainer should only be used if the person is a professional trainer in your organisation as they should be given access to Broker and Underwriter training modules to get a more rounded overview of PPL if they have to facilitate a training session.
- **Roles:** Keep this as the default option of 'learner'
- **Class of Business:** Select the relevant class of business for the user from the list available
- Once all relevant fields have been entered select 

Note: PPL will continue to do the bulk upload of users for each class of business based on the list of users sent by the Market on their onboarding forms.

Assigning Training Modules to Users

The Organisation Administrator has the capability of assigning training modules to users.

- Select **Module Setup > Assign Modules**



- A search screen enables you to search by 'First Name' and/or 'Last Name' to find the user. Enter the search criteria and click **Search**.

Organisation	User Type	First Name	Last Name	
<input type="text" value="PPL"/>	<input type="text" value="Trainer"/>	<input type="text" value="michael"/>	<input type="text"/>	<input type="button" value="Search"/>



- Tick the checkbox beside the user that you wish to assign training modules:

Select Users	
<input type="checkbox"/>	Select
<input checked="" type="checkbox"/>	Michael McGillen

- Tick the checkbox beside the relevant modules at the left-hand side of the screen to assign them to the user:

Select Modules				
<input type="checkbox"/>	Select	Module	From Date	To Date
<input checked="" type="checkbox"/>		Underwriter Endorsements	19/09/2017	19/09/2018
<input checked="" type="checkbox"/>		Underwriter Firm Orders Advanced	19/09/2017	19/09/2018
<input checked="" type="checkbox"/>		Underwriter Firm Orders	19/09/2017	19/09/2018

- The **From Date** will default to today's date. The **To Date** will default to one year on from today's date. The dates can be edited if required.

- Select 
- Click  to check the modules that have been assigned to the user

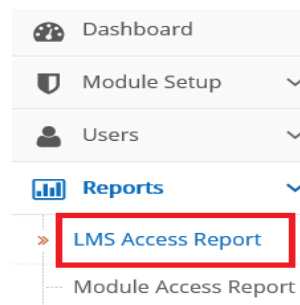
5. Reports

The Organisation Administrator can produce reports to monitor the PPL online learning that your organisation has undertaken on the PPL LMS.

LMS Access Report

The LMS Access Report is a high-level report that will provide you with the information about which learners from your organisation have logged into the PPL LMS, on how many occasions, and their last access date.

- Select **Reports > LMS Access Report**



- The grid at the bottom of the screen will display all the users in your organisation that have accessed the PPL LMS

- The list of users displayed are active users within the organisation

Note: If you wish to display a list of inactive users then select:

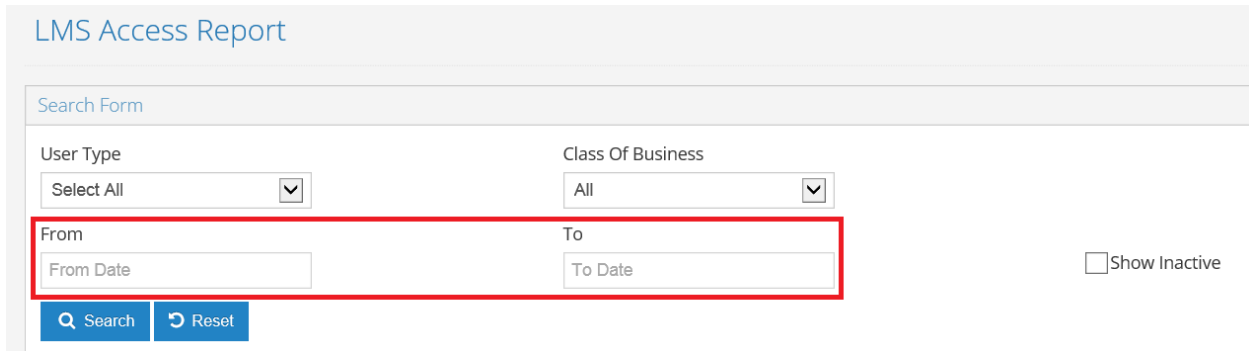
Show Inactive

- These results can be filtered by **Class of Business:**

Class Of Business



- The results can also be filtered by **Date** using the date fields provided:



Note: When applying a date criteria you need to add in a 'From' and 'To' date.

- Select  to retrieve your results

Note: Select  to clear your search criteria

- There is the option also of producing a report of users within your organisation that have not accessed the PPL LMS. Tick the checkbox below:

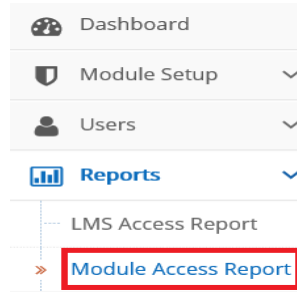
Show Users that have not Accessed the PPL LMS

- Results can be exported to PDF:  and/or exported to Excel: 

Module Access Report

The Module Access Report allows you to drill down and produce more granular reports that measure the progress of your learners with the training modules, learning units and tests available.

- Select **Reports > Module Access Report**



- The table at the bottom of the screen will list down all the users within your organisation and their learning activity, and you may want to produce a report based on this. Results can be exported to PDF and Excel.
- This report also provides the following additional filter options:

Module - This allows you to filter by training module

Unit – This allows you to filter by a learning unit



It is recommended to filter by Module first as this will limit the learning units based on the Module chosen.

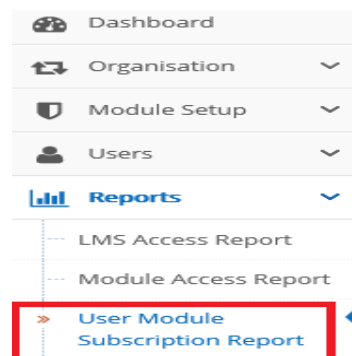
Status – There is the option to choose either of the following options to filter on: 'All', 'Completed', 'Incomplete', 'Not Started', 'Passed', or 'Failed'

Note: The status of 'Passed' or 'Failed' should only be chosen when you have chosen a Questions and Answers learning unit i.e. a test

User Module Subscription Report

The User Module Subscription Report allows you to check the training modules that a user has access to. There are fields to enable you to search by First Name and/or Last Name.

- Select **Reports > User Module Subscription Report**



- Search for the user by entering the 'First Name' and/or 'Last Name' to find the user and

click  Search

- The number of records displayed can be amended by the **Display records** dropdown:

