EnergyU V9.1

This document provides EnergyU administrators with an overview of the changes that will be introduced by the upgrade from version 8 to version 9.1.

April 2017

EnergyU LMS Upgrade

EnergyU Version 9.1 Upgrade

EnergyU LMS Administrator System Recommendations

Following are recommendations to ensure proper functioning of the browser-based administrative application that opens when you click Launch Administrator.

Software	
Operating System	Windows 7, Windows 8, Windows 8.1, Windows 10, Mac OS X 10.9 "Mavericks", Mac OS X 10.10 "Yosemite", Mac OS X 10.11 "El Capitan"
Browser	Microsoft Internet Explorer 10 or 11, Mozilla Firefox (must have Extended Support Release), Apple Safari (6.2 and above)
Microsoft Silverlight	Microsoft Silverlight Runtime 5.0 or above is required.
Hardware	
CPU	2.0 GHz or above
Memory	4 GB minimum, 8 GB recommended
Display	1280 x 1024 resolution or above
Connectivity	LAN connection to a TCP/IP network with 512 Kbps connection or above

Note: System requirements are subject to change in response to, among other factors, changes in underlying technology.

EnergyU Learner System Recommendations

The web-based learning environment is used by learners to access courses. EnergyU administrators have the ability to launch LMS Administrator from the learning portal.

Software	
Operating System	Windows 7, Windows 8, Windows 8.1, Windows 10, Mac OS X 10.9 "Mavericks", Mac OS X 10.10 "Yosemite", Mac OS X 10.11 "El Capitan"
Browser	Microsoft Internet Explorer 10 or 11, Mozilla Firefox Firefox (must have Extended Support Release), Apple Safari (6.2 and above)
Plug-ins	Adobe Flash Player 9.0 or above is required to display some course content
Hardware	
CPU	2.0 GHz or above
Memory	2 GB minimum, 4 GB recommended
Display	1280 x 1024 resolution or above
Connectivity	512 Kbps connection or above
Sound	Sound card and speakers

Note: System requirements are subject to change in response to, among other factors, changes in underlying technology.

Feature Changes Due to Upgrade

The way the following activities are performed by EnergyU system administrators will be changed slightly as a result of the upgrade:

- Resetting User Data
- Resetting Courses and Certificates
- Modifying Certificate Maintenance Start Date
- Certificate Program Enrollment
- Distribution Groups

Refer to the remainder of this document for an explanation of the differences in operation for performing the above activities.

Resetting User Data

> *When using the certificate program, it is important to follow proper procedures for resetting courses and certificates.* *There is no "undo" for a reset – RESETS CANNOT BE REVERSED.*

How to Reset User Data Overview

As with version 8, courses are only reset when the user has failed and needs to retake. If the user has a passed score and has earned the certificate, the certificate will automatically reset the course 60 days prior to expiration. If the user needs to retake the course prior to the automatic 60-day reset, the administrator can reset the user's certificate, which will in turn reset the course. In version 8, it was possible for administrators to incorrectly reset the course instead of the certificate. In version 9, the administrator will not be able to reset passed courses that are part of a certificate program – the certificate program will need to be reset.

Resetting Users (Multiple)

Selecting **Reset User Training Data** from the Users tab will allow you to select one or more users for which to reset data.

1. If required, select the appropriate level in the hierarchy.
2. In the categories bar, select **Users**.
3. From the **All Users** filter, select the **Reset User Training Data** option at the right.

4. Locate and select the user(s) for which you wish to reset the training data. Click the **Next** button in the lower right corner.

5. Select the type of data you wish to reset (options include completions for courses, curriculum, and certifications). Click the **Next** button in the lower right corner.

6. If any Course Completions was selected in the previous step, either check the box next to **Reset all courses**, or click **Select courses to be reset from the list**. If Curricula Completions was selected in the previous step, check the box next to **Reset all curricula**, or click **Select curricula to be reset from the list**. If Certificates Completions was selected in the previous step, check the box next to **Reset all certificates**, or click **Select certificates to be reset from the list**.

7. Check the box to **Reset all courses**, or if resetting only select courses, check the box next to the desired course(s) you wish to reset. **WARNING: Resetting all courses cannot be reversed!**

8. When choosing only select courses, you will receive a list where individual courses can be selected. Once your selection is complete, click the **Next** button in the lower right corner.

NOTE: A (P) following the course name indicates the course has a passed score. (CPU) indicates the course is assigned via the certificate program. Only failed courses that are (CPU) can be reset to allow retake. For (P) courses you must reset the certificate program to reset the course for early requalification. You can roll your mouse cursor over the symbols and a tooltip will provide a description of the meaning (see below).
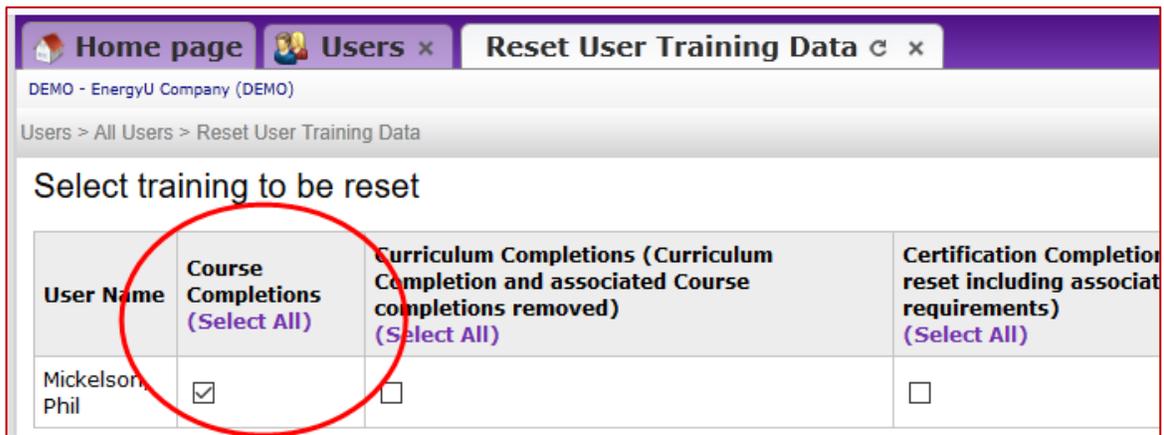
Important note on resetting curriculum completion status.

Resetting curriculum for a user will reset all courses within the curriculum. If a different curriculum assigned to the user contains any of the same courses, that curriculum will also be affected and prevent the user from achieving a completion status without retaking the reset courses.

Resetting Courses vs. Resetting Certificates

Scenario 1: User failed 192-1010 KNT and wishes to retake it. The EnergyU administrator will need to reset failed test to enable retake.

1. Click **Reset User Training Data**.
2. Check the box for the desired user and click the **Next** button in the lower right corner.
3. Check the **Course Completions** box and click the **Next** button.

4. Click the **Select courses to be reset from list** link to display list of courses.
5. Check the box next to the desired course (in this case 192-1010 KNT), then click the **Next** button.
6. Review your selection and click the **Submit** button in the lower right corner.
   Note: This action cannot be reversed!

Scenario 2: User wants retake 192-2402 KNT early (current passed score has not been automatically reset yet). The EnergyU administrator will need to reset certificate program to enable retaking of test for new qualification date.

1. Click **Reset User Training Data**.
2. Check the box for the desired user and click the **Next** button in the lower right corner.
3. Check the **Certification Completion and Requirement Completion** box and click the **Next** button.

4. Click **Select certificates to be reset from list** to display list of certificates.
5. Check the box next to the desired certificate, then click the **Next** button.
   Note: refer to your certificate list or the course information to determine the MEA certificate number.
6. Review your selections and click the **Submit** button in the lower right corner.
   Note: This action cannot be reversed!

Resetting from an Individual User's Tab

You can also reset a user's data by opening the desired user in a tab.

1. If required, select the appropriate level in the hierarchy.
2. In the categories bar, select **Users**.
3. From the **All Users** filter, search for and then select the desired user name.
4. From the **Courses** filter, select **Reset Course Tracking Data**.
5. Check the box for **Reset Course** and then check the box for each desired course.
6. Click the **Submit** button.

NOTE: (P) indicates the course has a passed score. (CPU) indicates the course is assigned via the certificate program. Only failed courses that are (CPU) can be reset to allow retake. For (P) courses you must reset the certificate program to reset the course for early requalification. (PR) indicates the course is a prerequisite for another course. You can roll your mouse cursor over the symbols and a tooltip will provide a description of the meaning (see below).


Modifying the Maintenance Start Date

In the event that you would like to make a course available for a user to requalify early, you can manually change the maintenance start date of the certificate.

Resetting the certificate resets both the course and the certificate, and is useful if the user is going to retake the course immediately. Changing the maintenance date of the certificate allows the course to be reset while maintaining the certificate's current expiration date, allowing the user to take the course any time prior to expiration.

1. If required, select the appropriate level in the hierarchy.
2. In the categories bar, select **Users**, then select the desired user to open that individual's user tab.
3. From the **Reports** filter, select **Credits - By User**.
4. It is recommended that you confirm the user has a current score prior to performing any resets.
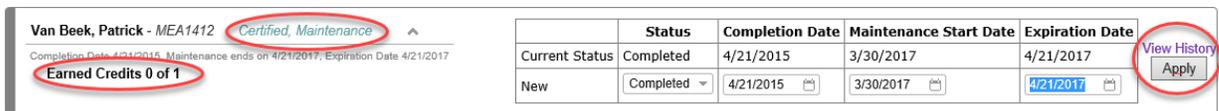

5. In the categories bar, select **Certification Programs**, then select **Manage Certification Programs**.
6. Search for the corresponding certification number and then select it to open the certificate in its own tab.
7. From the **Manage Users** filter select **Completion Management**.
8. Search for the desired user (it should show they are *Certified*).
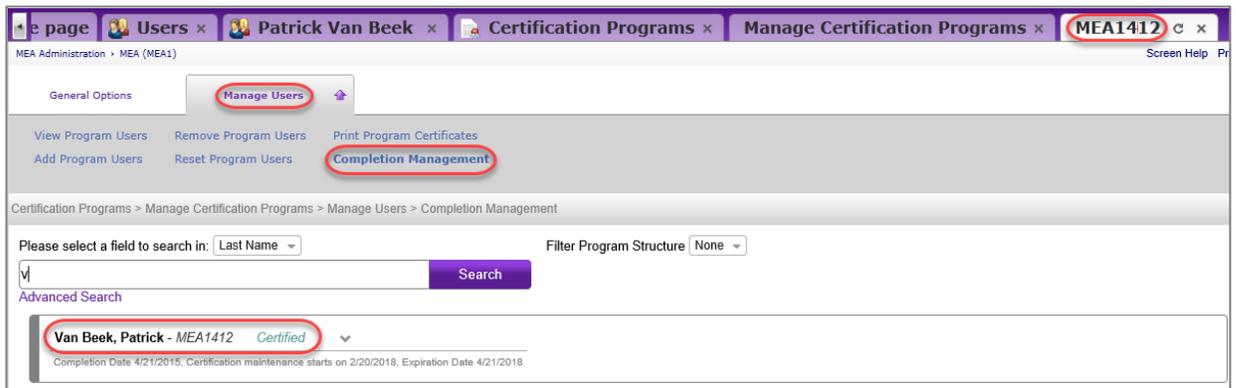
9. Select the downward arrow to the right of their name to access the completion information. Use the calendar to select a new **Maintenance Start Date**. NOTE: If you pick today's date, the course will reset immediately.

10. Once the new date is entered, select **Apply**.

Certificate Program Enrollment

Selecting a certificate to enroll one or more users in version 9.1 is the same as it was in version 8. You can also reset multiple users from a specific certificate's tab.
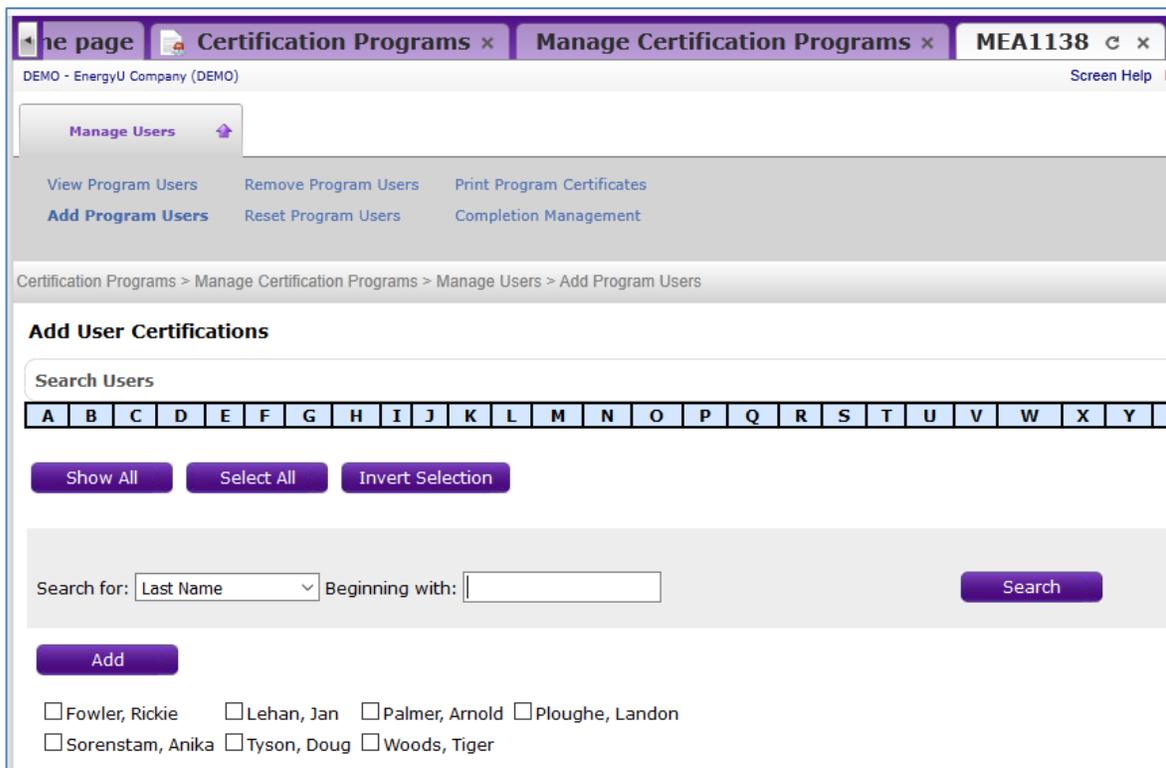
Enrolling Multiple Users in a Certification Program

1. If required, select the appropriate level in the hierarchy.
2. In the categories bar, select **Certification Programs**, then select **Manage Certification Programs**.
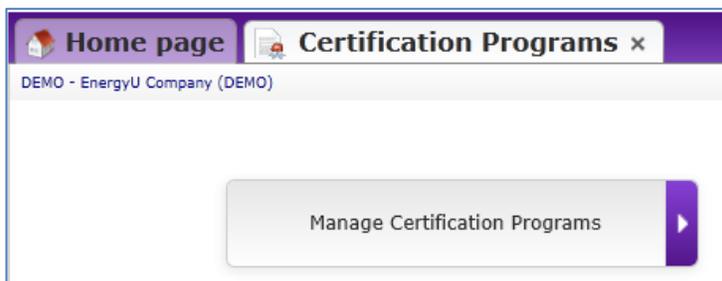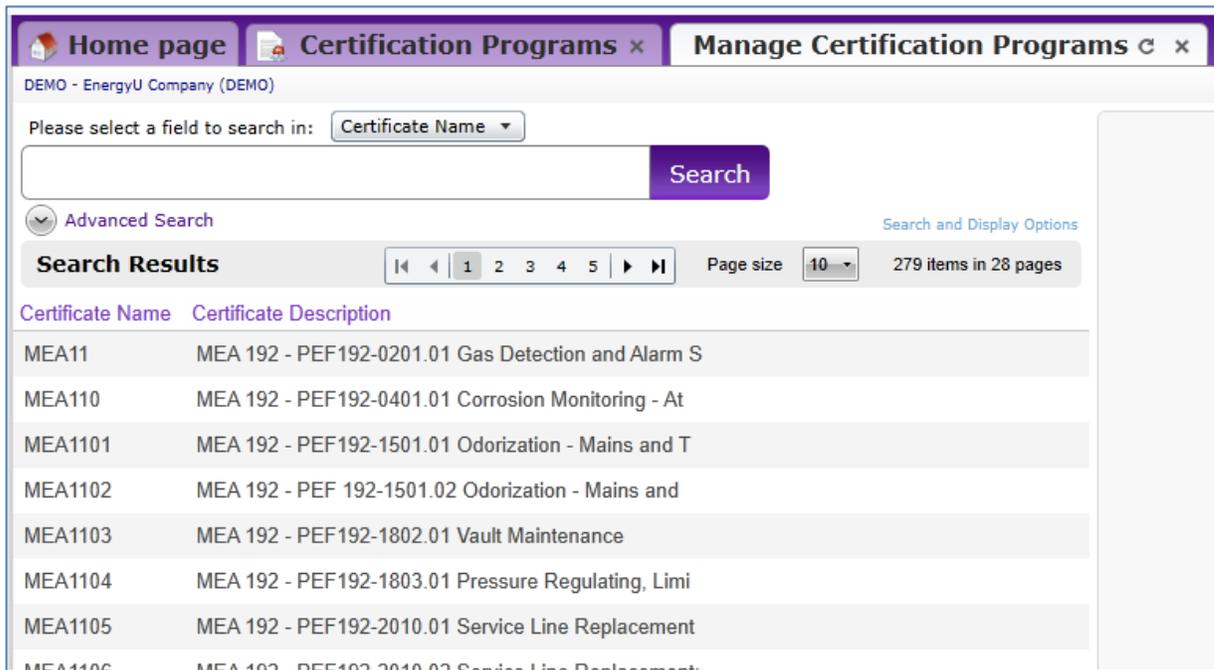
3. Click on the certification that you wish to enroll the user in, and it will open in its own tab.
4. From the **Manage Users** filter, you will be able to **View**, **Add**, **Remove**, and **Reset** users, and also **Print Certificates**.
5. Select **Add Program Users** and then click **Show All** or search for a particular user.


Note: If a user's name does not show as expected, the user is either not at the currently selected level in the hierarchy, or the user is already enrolled in the certification program.

6. Check the box next to the desired name(s) and click the **Add** button.

Enrolling Select User in Multiple Certification Programs

You can also enroll users in certification programs from the individual's user tab.

1. If required, select the appropriate level in the hierarchy.
2. In the categories bar, select **Users**, then select the desired user to open that individual's user tab.
3. From the **Certificates** filter, select **Manage Certifications**.
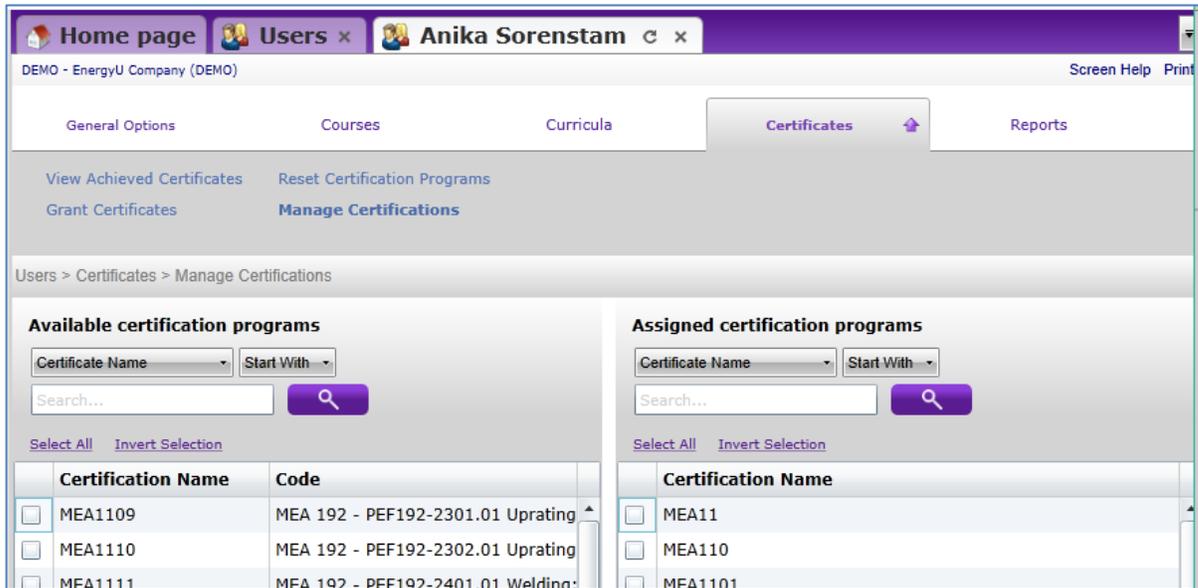
4. Check the box next to available certifications on the left and then click the **Assign** button. The user will be enrolled in the certification program(s) and thus be provided the corresponding courses.
5. Check the box next to assigned certifications on the right and then click the **Remove** button to un-enroll the user. *NOTE: Un-enrolling from the certification will not remove the course(s) – you will need to also remove the course(s) from the user.*

Distribution Groups

Understanding Distribution Groups

Distribution groups enable distribution of different types of content (courses, certification programs, curricula, etc.) to a select group of users according to a predefined set of rules. For example, a distribution rule titled SDSC-WELDER1 could be used to distribute standard certificates, courses, and company resources to specific individuals by simply entering the distribution group name in the appropriate field in the select users' profile.

MEA Support Staff can work with your company's EnergyU administrator to set up distribution groups. Before setting up a distribution group in EnergyU, the distribution group requirements must be predefined, as in the example spreadsheet below.

Distribution Group Name: SDSC-WELDER1		
Courses	**Certificates**	**Company Resources**
192-2401 e-TNG Welding 192-2401 KNT Welding 192-2402 e-TNG Visual Inspection of Welds 192-2402 KNT Visual Inspection of Welds 192-2403 e-TNG Nondestructive Testing of Welds 192-2403 KNT Nondestructive Testing of Welds OS-0101 e-TNG Introduction to OSHA Standards OS-0101 KNT Introduction to OSHA Standards	MEA1190, MEA1191, MEA1111, MEA1112, MEA1113, MEA1479, MEA1480, MEA1481, MEA1189, MEA1664, MEA1665	SDSC Welding Standards (PDF)

Administrators can change the **Search and Display Options** on the **Users** tab to include the **Custom 4** field in the display, which will show assigned distribution group information for each user.

If you use distribution groups, you will be able to view the distribution groups set up for your company. From the **Users** tab click the **Manage Distribution Grou**ps option button at the right.

You will then be able to view your distribution group names and descriptions, and activate or deactivate the group.