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## System Access

Access to **HAI Group Online Training** requires a personal user profile. If one was created for you by your organization's system administrator, you should have received an automated email containing your personal login ID and password. If you do not recall receiving an email, check your spam/junk folder or ask your system administrator.

### To log in:

1. Go to [www.htvn.org](http://www.htvn.org).
2. Enter your complete email address as your **login ID**.
3. Enter your **password**. *If you do not remember your password, select the **Contact Us** link at the bottom of the screen to request a reset.*
4. Select the **Login** button to open your *Training Home* page.

### To log out:

1. Place your cursor over **your initials** or **avatar** in the gray navigation bar.
2. Select **Logout**.

### To request a password reset:

1. Contact your organization's system administrator **OR** email [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com).

### To change your password:

1. Place your cursor over **your initials** or **avatar** in the gray navigation bar.
2. Select **Account** from the dropdown box.
3. Select the **Edit Password** link.
4. Enter your current **Password**.
5. Enter your desired **New Password** – Remember your password is case sensitive.
6. Re-enter your desired **New Password** for confirmation.
7. Select the **Save** button.

## System Access

### To reset another user's password:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select **People**.
4. Enter the user's name (first or last) or email address in the **Search** field.
5. If you wish to include de-activated users in your search, select **See more search criteria** to open advanced search options and de-select *Active* to include all users.
6. Select the **Search** button. A list of user accounts matching your search criteria displays.
7. From the search results on the *People* page, choose **Login Assistance** from the *Action* menu.
8. Select the **Go** button. The **Login Assistance** window displays.
9. Make note of the user's *Login ID* and provide it to the user.
10. Select the **Create Password** button. A light green box will appear at the top of the screen providing a *temporary password* for the user.
11. Provide the *temporary password* to the user verbally or paste it into an email. The password is case sensitive and the user will be prompted to change it. **Important:** *If the password contains any characters that appear to be an "L" or an "O" they are actually ones and zeros.*

### To get help:

If you need assistance with system access, contact your organization's system administrator  
OR email [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com)

## Profile Management

A **Personal User Profile** is required to access **HAI Group Online Training**. Each employee should have one user profile, and may edit their own user profile when needed. Administrators can edit any profile within their respective organization.

### To edit your user profile:

1. Place your cursor over **your initials** or **avatar** in the gray navigation bar.
2. Select **Account** from the dropdown box.
3. Select the **Profile** tab.
4. Select the **Edit User Information** button.
5. Make modifications to all desired fields.
6. Scroll down and select the **Save** button.

### To edit another user's profile:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select **People**.
4. Enter the user's name (first, or last) or email address in the *Search* field.
5. If you wish to include de-activated users in your search, select **See more search criteria** to open advanced search options and de-select *Active* to include all users.
6. Select the **Search** button. A list of user accounts matching your search criteria displays.
7. From the search results page, choose **Edit Profile** from the *Action* menu.
8. Select the **Go** button. The selected user's profile window displays.
9. Select the **Profile** tab.
10. Select the **Edit User Information** button.
11. Edit the desired fields.
12. Select the **Save** button.

## Profile Management

### To create a user profile for a new user:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select **People**.
4. Select the **Create Account** button.
5. Enter the user's *full email address* as their *Login ID* and complete all subsequent fields.
6. Click the **Next** button to navigate through the information pages.
7. In the **Confirm Full Company Name** field, type in your *organization's full name* (No abbreviations).
8. Click in the **Organizations** box.
9. Enter *some or all of your organization's name* into the search box.
10. A list of organizations matching your search displays.
11. Select *your organization* from the list.
12. Select the **Create** button at the bottom of the page. The new user will receive their login ID and password in an automated email.

### To deactivate or reactivate a user profile (profiles cannot be deleted):

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select **People**.
4. Enter the *user's name* (first, or last) or *email address* in the **Search** field.
5. If you wish to include de-activated users in your search, select **See more search criteria** to open advanced search options and de-select *Active* to include all users.
6. Select the **Search** button. A list of user accounts matching your search criteria displays.
7. From the *Search Results* page, choose **Edit Activity** from the *Action* menu.
8. Select the **Go** button. The selected user's edit activity window displays.
9. Select the **Inactive** radio button to *deactivate* the user profile. Select the **Active** radio button to *reactivate* the user profile.
10. Select the **Save** button.


## Course Purchasing

**Any user may purchase courses.** If you are purchasing a course for another individual, that individual must have a personal user profile **before** your purchase is made so that you may grant them proper access to the course. One copy of a course must be purchased for **each** learner.

**Course pricing** is automatically determined by your organization's current subscription status with HAI Group Online Training. If you feel the pricing displayed in your catalog does not reflect your organization's current subscription status, email: [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com).

**To purchase a course, complete all three key steps below.**

### 1 Find the course in the course catalog

1. Enter all or part of the course title into the **Catalog Search** box in the grey navigation bar.
2. Select the **Search**  button.
3. Scroll through the search results to find the desired course.
4. Select the **Course Title** you wish to purchase to view its details. The course's details page will display.
5. Identify your intended payment method below to continue.

### 2 Process your payment

1. Follow the instructions below according to your payment method:

#### CREDIT CARD

**From the Course Details page...**

1. Select the **Add To Cart** button.
2. Select the **Shopping Cart** icon in the menu bar.
3. Verify the course title and price.
4. Enter the desired **Quantity**.  
*Select the **Update** button if changed.*
5. Select the **Checkout** button.
7. Select the **Use this payment method** button.
8. Complete all subsequent fields.
9. Select the **Submit** button. The payment confirmation screen displays.

**Do not use the Print Receipt button on this page.** [Click here for How To Print Your Receipt: Page 7](#)

[Click here for Step 3: Page 7](#)

#### CHECK

**From the Course Details page...**

1. Scroll down to **Pricing and Payment Options**.
2. Select the **Pay by check** link.  
*The Pay-by-Check Request Form will open.*
3. Complete all required fields on the form.
4. Select the **Submit** button.  
*An invoice will be emailed to you. Once payment is received each learner will be notified by email and will have instant access to the course.*

## Course Purchasing

[Click here for Steps 1 – 2: Page 6](#)

### 3 Grant course access to the learner(s)

1. From the *Payment Confirmation* screen, select the **View Orders** button. (Do NOT use the **Print Receipt** button from this page)  
**OR** From the **main menu** bar, select **your initials** or **avatar** then select **Orders**.
2. Select the **Manage Access Keys** button.
3. Select the **Assign** button for the course you wish to assign.
4. Enter the *learner's email address* into the **User** field then press your **Enter** key.  
**Note:** *The learner must already have a user profile with the same email address* [Click here for How to Create a User Profile: Page 5](#)
5. If applicable, select the **Add Another** button if multiple copies of the course were purchased, and add additional email addresses as needed.
6. Select the **Assign** button. *The course will be placed on each individual's training home page.*  
**Note:** *You should alert each learner as no system email will be sent*

### To print a receipt for a course purchase:

1. Place your cursor over **your initials** or **avatar** in the gray navigation bar.
2. Select **Orders**. A list of your orders will display
3. Locate the desired order on the list, then select its corresponding **View Details** button. The *Order Details* screen will display.
4. Select the **Show More** button to view the entire transaction's details.
5. Select the **Print** button in the upper right hand side of the screen to print your receipt.

### To get help:

If you need assistance with course purchasing, contact your organization's system administrator

**OR** email [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com)

## Course Enrollment and Assignment

### To find and enroll in a course:

1. Select the **Catalog Search** box in the grey navigation bar, enter your search terms, then select the **Search** button, **Or** select the **Catalog** button to view a list of topics and select a specific topic.
2. Select a desired **Course Title** to view course details.
3. Select the green **Enroll** button located in the blue course title pane.  
**Note:** *If the course requires payment, a green **Add To Cart** button will appear in the right side panel. [Click here for Course Purchasing Instructions: Page 6.](#)*

### To take the course:

1. Complete all steps above, then select the **Content** tab to view course sections.
2. Select **Course Resources** or **Getting Started With Your Course** to access all workbooks and written course materials in PDF format.
  - 2.1. Select the **Start** button for the desired resource to open it.
  - 2.2. Access the *Print* and *Download* options by placing your cursor toward the top of the window.
  - 2.3. Select the **Exit** link at the bottom of the window to close the document and return to the course contents.
3. Select **Coursework** to access all course parts, quizzes, tests, and exams.  
**Note:** *All course parts will have a status of not **Not Enrolled** until they are started.*
  - 3.1. Select the **Start** button for first course part to begin – it may open in a new window.
  - 3.2. When the part is completed, close/exit the course part window or press your F5 key.
  - 3.3 Select the **Start** button for the proceeding course part – it may open in a new window.  
*Repeat steps 3.1 through 3.3 to complete all course parts – When all course parts are completed, the course will no longer display in your Current Training portlet and will only be accessible from your **Transcript**.*

### To access a completed course from your transcript:

1. Select **Transcript** from the gray navigation bar. If you are an administrator, select **Training** from the gray navigation bar, then select **Transcript**. Your transcript displays.
2. Select the **Curriculum** tab. All started and completed courses will be listed alphabetically.
3. Click on the *desired course title* to access it.



## Course Enrollment and Assignment

A **training assignment** is a course assigned to individual users or group of users. The *Training Assignments* page allows you to create new training assignments, as well as manage existing assignments. **To assign courses to others, complete all five steps below.**

### 1 Create a new assignment

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select the **Training** option. The *Training Page* displays.
4. Select the **Create Training Assignment** link. A blank assignment page displays.
5. Select the **Edit** icon next to the *Unnamed Assignment* field.
6. Enter your desired assignment name in the field.

**Note:** We recommend assigning *ONE* course *PER* ASSIGNMENT and naming the assignment the same as the course being assigned, followed by the current year and your initials. **For Example: Customer Service Basics 2021 (DLS)**

7. Select the green **checkmark** button to save your changes.

### 2 Add courses

1. Select the **Add Content** button. The *Add Content* window displays a list of active courses.
2. Use the **search field** to filter your list of courses. (Optional)
3. Use the **checkboxes** to select the course you want to add.  
**Note:** While multiple courses may be selected, we recommend adding only *ONE COURSE PER ASSIGNMENT*.
4. Select the **Add** button. The selected course is added to the learning content list.

[Click here for Steps 3 - 5: Page 10](#)

## Course Enrollment and Assignment

[Click here for Steps 1 - 2: Page 9](#)

### 3 Add assignees

1. Select the **Assignees Tab** and then select the **Add Assignees** button. The *Add Assignees* window displays a list of active employees.
2. Enter **names** in the search field to find specific users. (Optional)
3. Select the **Search** button. The list of assignees updates, matching your search criteria.
4. Use the **checkboxes** to select the assignees you want to add.  
**Note:** *You may need to navigate multiple pages of search results to find the desired names.*
5. Select the **Add** button. The selected users are added to the assignees list.
6. Repeat steps 1-5 to add additional assignees to the assignment.

### 4 Select a due date

1. Select the **Due Date** tab.
2. Select the **Change** button. The *Assignment Due Date* window displays.
3. Use the **Yes/No** toggle to indicate that the assignment does have a due date.
4. Use the **Is this a recurring assignment?** radio buttons to select "No."
5. Use the **When is it due?** radio buttons to select your desired due date option. The **Within** option is **recommended**. Enter the desired time period.
6. Leave the **previous completions** setting to **No**.
7. Change the **Allow completions after due date** setting to **Yes**.
8. Use the **Email Reminder** option to schedule system email reminders to assignees. (Optional)
9. Leave the **Send extension** emails setting on **Yes**.
10. Select the **Save** button. A summary of your selections displays on the *Due Date* tab.

### 5 Activate the assignment

1. Select the **Assign** button. Each learner will receive an email notification.  
**Note:** *Once an assignment has been made, the due date/period cannot be changed. However, extensions can be applied to each learner.*

## Course Enrollment and Assignment

The **Training Assignment Dashboard** provides administrators and organization managers with a high-level summary of training assignment data. Information includes the percentage of users who are overdue for their training, the organizations and managers with the most overdue learners, and a list of items overdue for each user.

### To view the Training Assignment Dashboard:

1. Place your cursor over your initials or avatar in the gray navigation bar.
2. Select the **Reports** option. A page listing available reports and dashboards displays.
3. Find the **Training Assignment Dashboard** in the Dashboards area.
4. Select the **Open** button for the dashboard.

The **Manage Extensions** page allows you to give users additional time during which to complete a training assignment.

### To extend an assignment due date:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select the **Training** option. The Training page displays.
4. Select the **Manage Training** link.
5. Select the **Options** dropdown button and select **Manage Extensions & Exemptions**. A search screen will display.
6. Enter *all or part of the assigned course title* you wish to apply an extension to.
7. Select the **Search** button. A list of courses matching your search displays.
8. Select the **GO** button for the desired course. A search screen displays.
9. Enter the *name of the learner* for whom you would like to apply an extension. Leave the fields blank for list of all assignees.
10. Select the **Search** button. A list of assignees matching your search displays.
11. Locate the desired assignee on the list and select **Apply Extension** from the *Action* dropdown box.
12. Select the corresponding **GO** button. The *Apply Extension* window displays.
13. Enter the *number of days* you would like to extend the assignment by.
14. Enter the *reason* for the extension.
15. Select the **Apply Extension** button. The assignees due date will be adjusted accordingly.

## Course Enrollment and Assignment

Course assignments can be **canceled** using one of the two methods below.

### To cancel an assignment for a specific learner(s):

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select the **Training** option. The Training page displays.
4. Select the **Manage Training** link. Current training assignments will be listed.
5. Select the desired assignment.
6. Select the **Assignees** tab.
7. Select the **check box** next to the employee's name(s) you wish to remove.
8. Select the **Remove** button.

### To cancel an entire assignment for all assignees:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select the **Training** option. The *Training* page displays.
4. Select the **Manage Training** link. Current training assignments will be listed.
5. Click the **check box** for the desired assignment.
6. Click on the **Delete** button.
7. From the **delete** confirmation pop-up, click on the **OK** button.

## Course Enrollment and Assignment

**Learner progress** can be viewed by any three of the following methods:

- Individual with a progress bar
- Group of individuals with course status (enrolled, started, completed)
- Group of individuals by quiz, test, or exam scores

### To view learner progress – By individual with a progress bar:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Manage** in the gray navigation bar.
3. Select **People**.
4. Enter the *user's name* (first, middle, or last) or *email address* in the **Search** field.
5. Select the **Search** button. A list of user accounts matching your search criteria displays.
6. From the search results page, choose **View Transcript** from the *Action* menu.
7. Select the **Go** button. The selected learner's transcript window displays.
8. Select the **Curriculum** tab. A list of the learner's courses will display with a progress bar.
9. To view another learner's progress, click on the **current learner's name** link under the gray menu bar.
10. Repeat steps 4-8.

### To view learner progress – Buy group of individual with course status:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Administer** in the gray navigation bar.
3. Select **Reports Console**. The *Reports Console Search* window displays.
4. Select the **Search** button. (Do not enter any search criteria) a listing of report options displays.
5. Select **Organization Report – Training Assignments**. A verification screen displays.
6. Select the **Select** button. The *Report Criteria* page displays.
7. Under **Training Types**, select **Curriculum**.
8. In the **Start Date** box, enter the *date you assigned the courses*. *Entering an earlier date is recommended*.
9. In the **End Date** box, enter a date one year from the current date to assure you capture all assignments with future due dates.
10. Select the **Run Report** button. The report will open in a new window.
11. Select the **Export to Excel** link if you wish to export the data to an Excel spreadsheet and do further filtering, sorting, and grouping.

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## Course Enrollment and Assignment [Continued from page 13](#)

**Learner progress** can be viewed by any three of the following methods:

- Individual with a progress bar
- Group of individuals with course status (enrolled, started, completed)
- Group of individuals by quiz, test, or exam scores

### To view learner progress – Group of individuals by quiz, test, or exam score:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Administer** in the gray navigation bar.
3. Select **Reports Console**. The Reports Console Search window displays.
4. Select the **Search** button. (Do not enter any search criteria) a listing of report options displays.
5. Select **Organization Report – Training Progress**. A verification screen displays.
6. Select the **Select** button. The Report Criteria page displays.
7. Under **Training Types**, select **Online**.
8. In the **Start Date** box, enter your **desired start date** (keep in mind that learners may have started their course many months back).
9. In the End Date box, enter the **current date**.
10. Select the **Run Report** button.  
*The report will open in a new window and will list all course parts completed by learners within the date range you entered in steps 8 and 9.*
11. Click on the **Filter** button located above the report results.
12. From the **Filter Column** dropdown box, select **Score**.
13. In the **Comparison** drop-down box, select **Contains**.
14. In the **Value** box, enter **Quiz**
15. Click the **Add** button – the report will now list the quiz results for all users. The number of quizzes listed for each user will be an indication of how much of the course they have completed.
16. Select the **Export to Excel** link if you wish to export the data to an Excel spreadsheet and do further filtering, sorting, and grouping.

## Course Access and Completion

The **Current Training** page displays all training items you have not yet completed and may include items in which you have enrolled or that were assigned as required training. Completed courses can be viewed and re-accessed from your transcript.

### To access your current training page:

The **Current Training portlet** on your **Training Home** page will only display five current training items. To view all of your current training...

1. Select **Current Training** in the gray navigation bar. If you are an administrator, select **Learning** from the gray navigation bar and select **Current Training**. Your *Current Training* page displays.

### To take a course on your current training page:

1. Complete all steps above, then select the **View** or **Access Item** button for the course you wish to open.
2. Select the **Content** tab to view course sections.
3. Select **Course Resources** or **Getting Started With Your Course** to access all workbooks and written course materials in PDF format.
  - 3.1. Select the **Start** button for the desired resource to open it.
  - 3.2. Access the *Print* and *Download* options by placing your cursor toward the top of the window.
  - 3.3. Select the **Exit** link at the bottom of the window to close the document and return to the course contents.
4. Select **Coursework** to access all course parts, quizzes, tests, and exams.

**Note:** All course parts will have a status of **Not Enrolled** until they are started.

  - 4.1. Select the **Start** button for the first course part to begin – it may open in a new window.
  - 4.2. When the part is completed, **close/exit** the course part window or press your **F5 key**.
  - 4.3 Select the **Start** button for the proceeding course part – it may open in a new window.
  - 4.4 Repeat steps 4.1 through 4.3 to complete all course parts. When all course parts are completed, the course will no longer display in your Current Training portlet and will only be accessible from your **Transcript**.

## Course Access and Completion

**Your transcript** is a permanent record of all learning content in which you have been enrolled or participated, as well as content assigned to you. If you have attempted a learning item more than once, each attempt displays on your transcript.

### To access your transcript:

1. Select **Transcript** from the gray menu bar. If you are an administrator, select **Training** from the gray menu bar, then select **Transcript**. Your transcript displays.
2. Select the **Curriculum** tab. All started and completed courses will be listed alphabetically.
3. Click on a **course title** to re-access a course.

### To view and print your certificate of completion:

1. Complete all steps above.
2. Click on the *desired course title* to open the course.
3. In the blue course **title header**, select the **Take Survey** button if applicable.  
**Note:** *Course surveys must be completed before you can print your certificate of completion.*
4. Complete the **Course Survey**, then close the *Course Survey* window.
5. Select the **View Certificate** button. Your certificate of completion will open in a new window.
6. Place your cursor over the top of the certification to view **print** and **download** options.



## Group Viewing

**Group Viewing** allows you to view a qualified course as a group from your personal user profile using a single computer, and then mark the course *completed* for each attendee. Not all courses are available for group viewing. See important notes below before scheduling a session.

### Important notes:

- Group viewing is only available to [Subscribers: Page 26](#)
- Group viewing is only available for non-CEU courses
- Only a Group Viewing proctor can issue course credit
- Each attendee must have a personal user profile to be issued credit
- You must contact our [Support Team: Page 25](#) to activate *Group Viewing* for your organization

### Before you schedule a session:

Verify the course is accessible for group viewing...

1. You must have **Administrator Access** to perform this function.
2. Select **Manage** from the gray menu bar, and then select **Training**.
3. Under **Quick Links**, select **Manage Enrollment**.
4. Select the **Search for** field and enter the name of the course. Leave blank for a list of all courses.
5. Select the **See More Search Criteria** link.
6. Click in the **Type** drop-down box.
7. Select **Curriculum**.
8. Select the **Search** button.
9. If the course is listed it is available for group viewing. If it is not, it must be assigned to individual learners.

[Click here for How To Assign Courses: Page 9](#)

### What you will need for each session:

- Internet connection
- Large monitor or projector
- Adequate sound system
- Sign-in sheet
- Planner & Check List (Optional) – [Click here to view the Planner And Check List: Page 17](#)



## Group Viewing

### Planning check list

**These tasks should be completed well in ADVANCE of your planned session:**

- Verify the course is available for group viewing
- Add the course to your personal training home page
- View entire course to become familiar with its content
- Print course handouts and other desired documentation
- Verify each employee in your organization has an active user profile
- Identify and reserve the room/space, and any needed projectors, monitors, or sound equipment you may need for your session
- Log into HAI Group Online Training, and play a portion of the course in the room and on the computer you plan on using for your session to identify any technical issues
- Address all technical issues with your IT department and re-test well in advance of your session

### Pre-session check List

**These tasks should be completed before your session begins:**

- Place a copy of the sign-in sheet in a location that will prompt each attendee to sign in
- Log into HAI Group Online Training and open the first course part
- Plug speakers or sound system into computer
- Play a portion of the first course part to verify visual and audio is working properly

### Post-session check list

**These tasks should be completed after your session**

- Verify all attendees have signed the attendance sheet
- After ALL course parts have been completed, record attendance on the HAI Group Online Training website ([www.htvn.org](http://www.htvn.org))
- File attendance sheet for future reference (Optional)

[Click here to view Session And Recording Instructions: Page 18](#)

## Group Viewing

### To run a session:

1. Make sure you have verified that the course you plan on showing is approved for group viewing.  
[Click here to view instructions on Before You Schedule a Session: Page 16](#)
2. Log into HAI Group Online Training using **your** personal user profile.
3. Add the course to your personal training home page.
4. Attach your computer to a large monitor/projector and adequate sound system.
5. Play the entire course for attendees.

### To record attendance:

After all course parts are completed...

1. You must have **Administrator Access** to perform this function.
2. Select **Manage** from the gray menu bar, and then select **Training**.
3. Under **Quick Links**, select **Manage Enrollment**.
4. Select the **Search for** field and enter the name of the course. Leave blank for a listing of all courses.
5. Select the **See More Search Criteria** link.
6. Click in the **Type** drop-down box.
7. Select **Curriculum**.
8. Select the **Search** button.
9. Locate the course viewed from the list and select its corresponding **Enroll Users** button.  
**Important:** Click on the course's **i** button to verify its **Content Type** is **Curriculum**.
10. Select the **Search** field and enter an attendee name, or leave blank to pull a list of all learners in your organization.
11. Select the **Search** button.
12. Select (Check) each of the users that attended the session.
13. Scroll to the bottom of the screen and change **Mark Enrollees Complete** to **Yes**.
14. Select the **Batch Enroll Users** button.
15. In the **Reason for Action** pop-up window, enter **Group View** and **date of the session**. (Ex: Group View – 1/1/2019)
16. Select the **Batch Enroll Users** button. All selected users have been recorded as *completing* the course.


## Reporting Tools

The **Reports Console** provides access to custom and standard reports available in the learning management system. Some reports are available to all users.

### Available reports include:

- **Content Access Report:**  
A listing of which courses have been accessed by each employee in your organization within a specified period of time.
- **Purchases Report:**  
A detailed listing of all courses purchased by your organization within a specified period of time.
- **Training Assignments Report:**  
A listing of courses that have been assigned and their current status by assignee.
- **Training Progress Report:**  
View training progress information for users, including score (if available). Detailed information is available through drill-down reports.

### To access the reports console and run a report:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **Administer** in the gray navigation bar.
3. Select the **Reports Console**. The *Reports Console Search* window displays.
4. Select the **Search** button. (Do not enter any search criteria,) A listing of report options displays.
5. Select the **desired report**. A verification screen displays.
6. Select the **Select** button. The report criteria page displays.
7. Under **Training Types**, select **Curriculum**.
8. In the **Start Date** box, enter the *first date* of records you wish to include on the report.
9. In the **End Date** box, enter the *last date* of records you wish to include on the report.
10. Select the **Run Report** button. The report will open in a new window.
11. To **display additional fields**, select the  icon and select the fields you wish to include in the report.  
Select the **OK** button to refresh the report.
12. Select the **Export to Excel** link if you wish to export the data to an Excel spreadsheet and do further filtering, sorting, or grouping.

## Reporting Tools

The **Training Assignment Dashboard** provides administrators with a high-level summary of training assignment data. Information includes the percentage of users who are overdue for their training, and a list of items overdue for each user.

Information can be filtered by various characteristics, and then used to contact learners (or their managers) about training progress. Data is also displayed in a tabular format, which can be exported for use outside the system.

**Note:** *The training assignment dashboard does not include information for inactive users or content.*

### To access and use the training assignment dashboard:

1. You must have **Administrator Access** to perform this function.
2. Place your cursor over **your initials** or **avatar** in the gray navigation bar.
3. Select the **Reports** option. The reports/dashboard page displays.
4. Select the **Open** button for the **Training Assignment Dashboard**. The dashboard displays.
5. Select a **completion status** from **the pie chart** to view all learners and their respective assignments in the selected status.
6. To **find a specific user** in the list, enter the name in the **Search Learners** box, then click on the **Search** button.
7. To **export the data** to an Excel spreadsheet, select the **Export** button.

## Getting Help

**Frequently asked questions - General questions:** [Click here to see Certification Questions: Page 23](#)

### How do I play content on my mobile device?

Most courses will work on a mobile device. However, make sure you are using Google Chrome as your web browser and that you have disabled pop-up blockers. If you are using an Apple device, you can download Google Chrome from the App Store. Please keep in mind that some courses will not work on mobile devices.

### Why don't I have permission to view my course or course part?

Partially completed course parts will display on your training home page and are labeled as **ONLINE**. Accessing these **ONLINE** course parts directly from your training home page will result in a permission error. Access all course content by clicking on the course title labeled as **CURRICULUM**.

**OR:** The course requires payment and has not been paid for. Add the course to your shopping cart and process payment for access.

**OR:** The course is only available to subscribers, and your organization is not a subscriber.

**OR:** The course has been de-activated and is no longer available.

### How can my organization become a subscriber?

Email [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com) to request general information or a quote.

### What are my payment options?

Credit card is preferred and provides instant access to course content. If you prefer to pay by check, submit a completed PAY-BY-CHECK form, and an invoice will be emailed to you. To access the form, go to: <https://www.housingcenter.com/pay-by-check/>

### HAI Group Online Training is IACET accredited. What does that mean?

As an accredited IACET Continuing Education Unit (CEU) provider, we are committed to, and demonstrate, best practices in adult learning and professional training, and have successfully mastered IACET's rigorous accreditation process. This allows us to offer CEUs on certain course content we produce.

## Getting Help

**Frequently asked questions - Certification questions:** [Click here to see General Questions: Page 22](#)

### **How long do I have to complete my certification course?**

You have 6-months from the date of enrollment to complete your course, including all three exam attempts.

### **Who can proctor my exam?**

Any individual in your organization who has not taken the exam in the past 6-months and does not plan on doing so in the next 6-months.

### **Nan McKay Proctoring Guidelines**

It is the responsibility of the proctor to preserve the integrity of the Online Certification Examination by insuring that the following testing environment is maintained during the testing period.

1. No written or verbal communication between examinees during the testing period.
2. Proctor has verified through a driver's license or other official identification that the person who is taking the test is the person who signed up to take the test.
3. Proctor is to remain in the room at all times during the exam.
4. No individual will have access to any unauthorized seminar materials during the testing period.
5. Under no circumstances will the proctor copy or allow copying of materials or examinations.
6. Proctor cannot have taken the exam in the past 6-months or plan to take the exam within the next 6-months
7. Proctor must be at least 18-years old.
8. **Under COVID-19, family members that met the criteria of rules 1-7 can also proctor an exam from home.**

Any violation or infringement of any of the above criteria will result in invalidation of exam results for participants.

### **When will I receive my certification plaque?**






Your certification plaque will be shipped directly from Nan McKay & Associates 8-10 weeks after you successfully pass your exam. Your patience is very much appreciated.

## Getting Help

### To resolve an audio or video issue:

Most audio and video issues are caused by a setting in your web browser or a poor internet connection. Following the tips below should resolve most audio or video issues.

### Tips:

- Use one of these preferred web browsers:  **Google Chrome**  **Firefox**  **Internet Explorer**  
Course videos are **NOT optimized** to work on these web browsers:  **X Microsoft Edge**  **X Safari**
- Verify that all pop-up blockers have been disabled
- Clear your web browser's history/cache
- Try connecting on a LAN line instead of using WiFi
- If there is no audio, verify that a headset or speakers are plugged into your device and that the volume is turned up



### Mobile Device

Most courses will work on a mobile device. However, make sure you are using **Google Chrome** as your web browser and that you have disabled pop-up blockers. If you are using an Apple device, you can download Google Chrome from the App Store. Please keep in mind that some courses will not work on mobile devices.



## Getting Help

### To access and use online help:

Page specific online help is available from most system pages.

1. Select the **?** icon in the gray navigation bar – a new tab will open providing help for the page you are on.
2. Follow the instructions provided.
3. Select linked items for additional information.

### To request technical assistance:

1. Email our support team at: [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com) and provide full details regarding your issue in your message. Our team will reach out to you in a timely manner.

#### **Support team hours:**

Monday thru Friday (Excluding Holidays)

8:00 a.m. through 4:00 p.m. EST

Email us anytime: [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com)

## Getting Help

### Subscriber benefits:

- Personal user profile for each employee
- Access to most courses at no charge
- \$200 Discount on certification courses
- Administrator access for management level employees to all key system functions
  - Profile management
  - Course assignment
  - Group viewing
  - Reporting
- Onboarding / User engagement assistance
- Personal help desk support

### Request a subscription:

- Contact us to discuss your training needs and to request a quote – [OnlineTraining@HousingCenter.com](mailto:OnlineTraining@HousingCenter.com) **OR** Call 1.203.272.8220 x295

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