eTAS – Basic Training Introduction

(electronic) Training and Administration System

For training purposes please always use http://mappsacc.mazdaeur.com/MazdaMastersWeb/login.do

1   Introduction

"An investment in knowledge always pays the best interest"
Benjamin Franklin, 1706-1790
Founding Member of the USA

eTAS, short for **electronic Training and Administration System**, is the online learning platform of Mazda Austria for the whole Mazda world. eTAS is a feature rich, web based application, enabling users to connect from virtually anywhere by using a standard web-browser (like Internet Explorer or Firefox). Accessible 24/7, users can take part in courses anytime and anywhere, regardless of their working schedule. With eTAS, employees gain knowledge about general facts, new product information, working procedures, customer related interaction and much more.

Some common features of eTAS include:

- user and company data management
- course and training management
- resource management (rooms, equipment, trainers)
- online tests
- qualification paths
- search functions
- reporting
- automated mailing
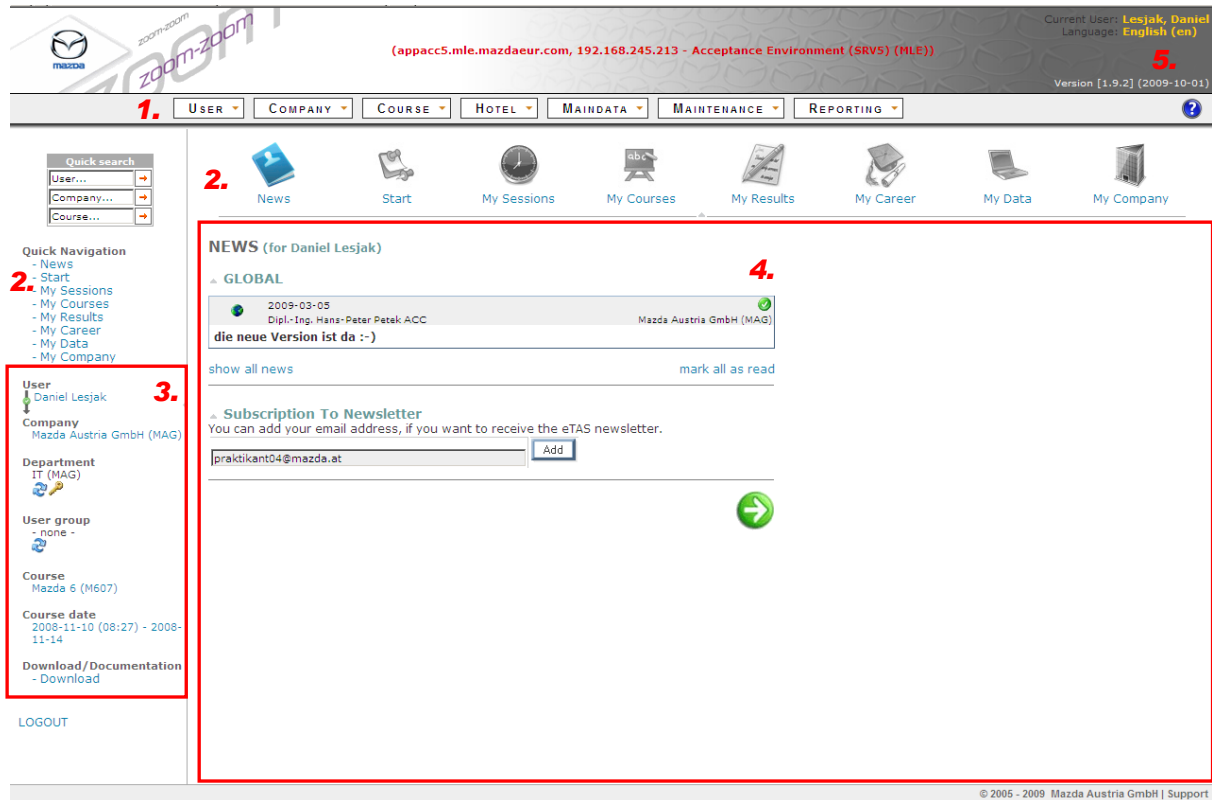- sundry billing interface (Mazda billing standard)
- multi language support

In addition, eTAS offers some extensions:

- HR module

- News module

- Sales module (incl. eFeedback)

Please see the separate documentations to gather detailed knowledge about these modules.

2   Basic Understanding

The Start-Up Screen

This is the common start-up screen, when you enter the eTAS application. In the main content section (4) you see the latest news if available. Otherwise you see the welcome page, called "Start". On this page you can find open invitations, open online tests, recommended courses, upcoming courses or your personal waiting list.

1. On top of the screen is the menu bar. Hold your mouse over the different elements and access any item from the pull-down menu that appears. Depending on your permission set in eTAS, you will see more or less available menu items.

2. This is the quick-access navigation. Click on any icon to get to that particular page. For convenience reasons there is a repeated navigation on the left side. Please note

that these quick links refer to the selected user on the left side. When you start, the links are set to your own pages.

3. Here you can quickly access different objects: the user, a company, a department, a user group, a course, a training session and the documentation. These options are the default values when navigating through eTAS. For example, the selected course "Mazda 6 (M607)" will be pre-selected in any lists regarding courses, but it can always be changed to another one.

4. As already stated, this is the main content area.

5. This is the current user with whom you are logged in (called "Current User"), your selected language and the current version of eTAS. Click on your name to quickly access your profile, when the selected user under (3) is not yours.

Menu

Most of the time, you will use the elements of the main menu.

| USER ▼ | COMPANY ▼ | COURSE ▼ | HOTEL ▼ | MAINDATA ▼ | MAINTENANCE ▼ | REPORTING ▼ |

The main menu consists of the following parts:

- User
- Company
- Course
- Hotel
- Maindata
- Maintenance
- Reporting

Depending on your permissions you will see more or less menu items. If the mouse pointer is placed over one such element, the menu expands and shows the available sub categories.
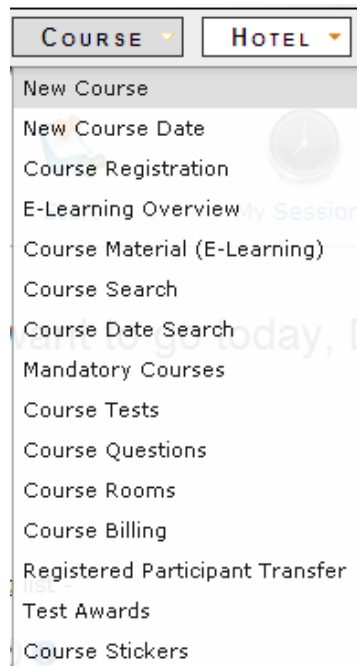
Your mouser pointer position affects, which menu element gets highlighted in grey. Choose your action and confirm it by clicking on the desired menu element. Now the page will be loaded and the menu fades back to its small representation.

User
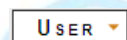
In the "User" menu you can do everything which has to do with users. This could affect your "Current User" (see on the top right) or another chosen user. One example would be the creation of a new user or user group. Another example would be the search for a certain user. In addition, you can change your password for your "Current User".

Company

COMPANY ▾

All actions which are associated with a company can be found in the "Company" menu. Here you can search for a company or create one. The "HR module" as well as the "Sales module" can also be found there.

Course

COURSE ▾

If you want to manage some course details, go to the "Course" menu. In this menu you can create a new course, training session, test, question or course rooms. You can also search for a special course or training session.

Hotel

HOTEL ▾

Do you want to enter a new hotel or hotel booking, than you can do that in the "Hotel" menu. Additionally, you can search for these elements.

Maindata

MAINDATA ▾

Here you can create and manage different objects. There you find some simple objects like a job role or hotel categories as well as complex objects like course location or resources.

Maintenance

MAINTENANCE ▾

In the "Maintenance" section you can add and edit news or create an eFeedback. With adequate permissions further administrative tasks can be done here. E.g. News Administration, eFeedback or the assignment of roles, rights and departments.

Reporting

REPORTING ▾

There are many reports available, which will cover the biggest parts of eTAS. This includes for example details about the course planning, online tests, e-Learning courses and feedback evaluations.

Icons

An icon is a pictogram, which is an important part of the graphical user interface. There are two types of application: Navigation and information. In the former case a specific action will be triggered if you click on an icon, and in the latter case the icon only shows a notification. Some examples:

Action icons

Notification icons

If you place your mouse pointer over a notification icon, you will get a description. Now some action icons will be explained in detail:

Icon	Description
	Add/New Icon Currently there are different types of icons. With them you can add a new requirement or a course date for example. Every time you want to add or create something use these icons.
	Delete Icon The opposite of the "Add/New Icon" is the "Delete Icon". This icon removes or deletes a defined element.
	Edit Icon Another important icon is the "Edit Icon". You can click on this icon and a new page will be loaded in which the settings of an object can be modified.
	Help Icon To support the user when he edits a setting this icon is available. If you click on it a windows pop up, which provides you with additional information about the setting you want to modify.

	Return Back Icon When navigating through eTAS, the "Return Back Icon" will appear at the top of the main content area. This icon escort you back to page, where you have been before. In addition, most of the settings will be stored. You can find this behavior in the user search for example.
	View Icon The icon is available in an overview and it guides you to a detailed page about a specific element. If you want to have a closer look on a user's profile for example, click on the "View Icon".
	Send email Icon If you want to send an e-Mail, click on it and you will be redirected to an input box, where you can type in the text and choose the e-Mail address.
	Set to active/inactive Icon With this icon you can set the status of an item like a user or course material to active or inactive. You can recognize the current status due to the displayed icon: for active, for inactive
	Transfer user Icon This icon is used to move a user from one company to another. Each user has an assigned company like Mazda Austria GmbH for example. If you want to transfer the user to Mazda Motors Europe, you have to click on the icon. A new window pops up where you can define the target company.
	Define qualification path Icon For assigning a qualification path to a user, this icon can be used. If a qualification path is assigned, the user will get course recommendations. Therefore the user can reach different certification levels.
	Resource blocking Icon You will find this icon on a resource like a trainer or course room. If you click on the icon a new window pops up. Within this window you can type in the date, when the resource will not be able to be booked by other users.
	Show organization chart Icon The organization chart is available for employees as well as for markets. If you click on this icon, you get an overview of the hierarchical relationship between the different elements. Thereby, only the parent and child elements will be shown. To get a broader overview, view the organization chart from the element on the top.
	Course tests Icon With this icon you can create your own course tests. You can define questions and answers. If you have finished, you can assign a test to the users from a training session.
	Upload Image Icon To individualize a created course, you can upload an image. This image will be displayed on the right side of the course information page.

	Course-Billing Icon If a user has attended a course, you can do the course billing. There you get an overview of all users, which have finished the course and unpaid invoices are outstanding.
	Manage SCORM course material Icon To upload SCORM material you have to click on this icon. In the pop-up window you can upload a SCORM 2004 file or choose an available course material from the server. You can also delete a course material or change the status for the course material from active to inactive if you want to. In addition, you can define here if the course material should be a new window or not. If not, you can modify the size of the overlaid window.
	Define requirements Icon Here you can define requirements for a certain target group. For example you can define from which country or company the attendees should come or which job role or certification level they should have. Through this function only a defined target group can register to your created course.
	Check course requirements Icon After a click on this icon you get a list of all users, which met the before defined requirements.
	Register Icon If you click on this icon, which is located right beside training session, you can register a chosen user (not the "Current User") to a date. To change the user, make a user search and click on a user. Now you have selected this user and the users name is displayed on the left side.
	Map/Route Icon A click on this icon opens a new window with a roadmap. You can have look on the place of the course location for example. In this window you can move the map by clicking on the map, holding the mouse button and moving to a direction. In addition, you can zoom in and zoom out. If this is still not enough for you, you can have a look at the aerial photos or click on "View larger map" hyperlink.
	Equipment Icon Do you want to know what equipment is available in the chosen course room, then click on this icon and you will find it out.
	Country quota Icon There are two possibilities to limit the number of attendees. One is to define course requirements and the second one is to define a country quota. You can choose a country and a number of users. After this has been defined, only a limited number of people of a certain country can register to that course.
	Team member Icon With this icon you can define a trainer for a training session. Thereby you can choose between a user or a user group.

	Resources Icon If you need a resource for your training, you can allocate this with this icon. You have to choose a resource pool and a resource group first, and then you can find the desired resource. Choose it and define a date, when you will need it. Should you need the resource only for a few hours, please don't book it for a whole day.
	Change Status Icon To change the status of online-tests solutions or results, click on this icon. You can either lock or free the status.
	Requirement Check Icon This icon displays if the chosen user fulfill the requirements or not. Either you can click on the icon or on a hyperlink like "Details" or "2 Requirements" to see, which requirements has been met and which not.

System Messages

Every time you create, edit or delete data within eTAS you will get one of three message types:

Green Messages

> The company "Test" has been added successfully.

Green messages are confirmation or information texts. You will mainly get them by successfully creating or editing objects.

Yellow Messages

> Hint: You are editing the data of "Fritz Genser"!

Yellow messages are mainly hints. Watch out for them and read them when you find them throughout eTAS.

Red Messages

> You must select a country.

Red messages are error messages. They tell you when you have done something wrong or something has happened within the system. Read them carefully and act accordingly!

Don't worry: most of the time when you see such messages you have just forgotten to enter mandatory fields or have mistyped information (e.g. like an 'a' in a digit field). Correct the stated fields (they are also red) and continue.

Searching

Another common feature in eTAS is the search interface. Basically, it is always the same layout as shown in this picture:

1. First, you see how many entries are found depending on your search parameter (The data in the picture is all test data – so don't worry if you find different data or some data is pure nonsense!)

2. Here you can click through the different pages. The more results, the more pages.

3. The found data. In this case the data is sorted in ascending order by the "Company name"-column. Click on the same column again and the results will be sorted in descending order. Click on any other column to sort the results according to the new column.

4. If you see blue text within eTAS, this indicates that it is a link, by clicking on it you will be directed to a new page. In this example, it will only show you the corresponding company but sometimes it will bring you to a new object (e.g. clicking on a company name, you will find the employees. By clicking on one of them, you will get to the user interface). With this option you can walk through different data.

5. Depending on your permissions, you will see more or less action icons. By clicking these icons you will automatically initiate an action (e.g. editing, deleting or registering to a course). Hold your mouse over an icon and you will see a tool tip (describing what this particular action will do.)

6. At some point you may want to use data from eTAS with a third-party application. With the export options, you can extract the results in various different formats: as CVS, PDF, XML and even Excel compatible data. To export the data, right-click on your preferred option and select "Save as…" (or something similar, depending on your browser).

3   Welcome To eTAS

Open your browser and enter the following URL (case-sensitive) in the navigation bar:

http://mappsacc.mazdaeur.com/MazdaMastersWeb/

3.1   Exercise: Log in to eTAS

Enter your username and password, choose your preferred language and press the "Login" button. If you have forgotten your password or haven't received one yet, click on "Lost account data?" and enter your username and your registered e-mail address.

3.2   Exercise: Browse through eTAS

Take your time and look around a bit. Navigate through the various menu items but don't change anything yet.
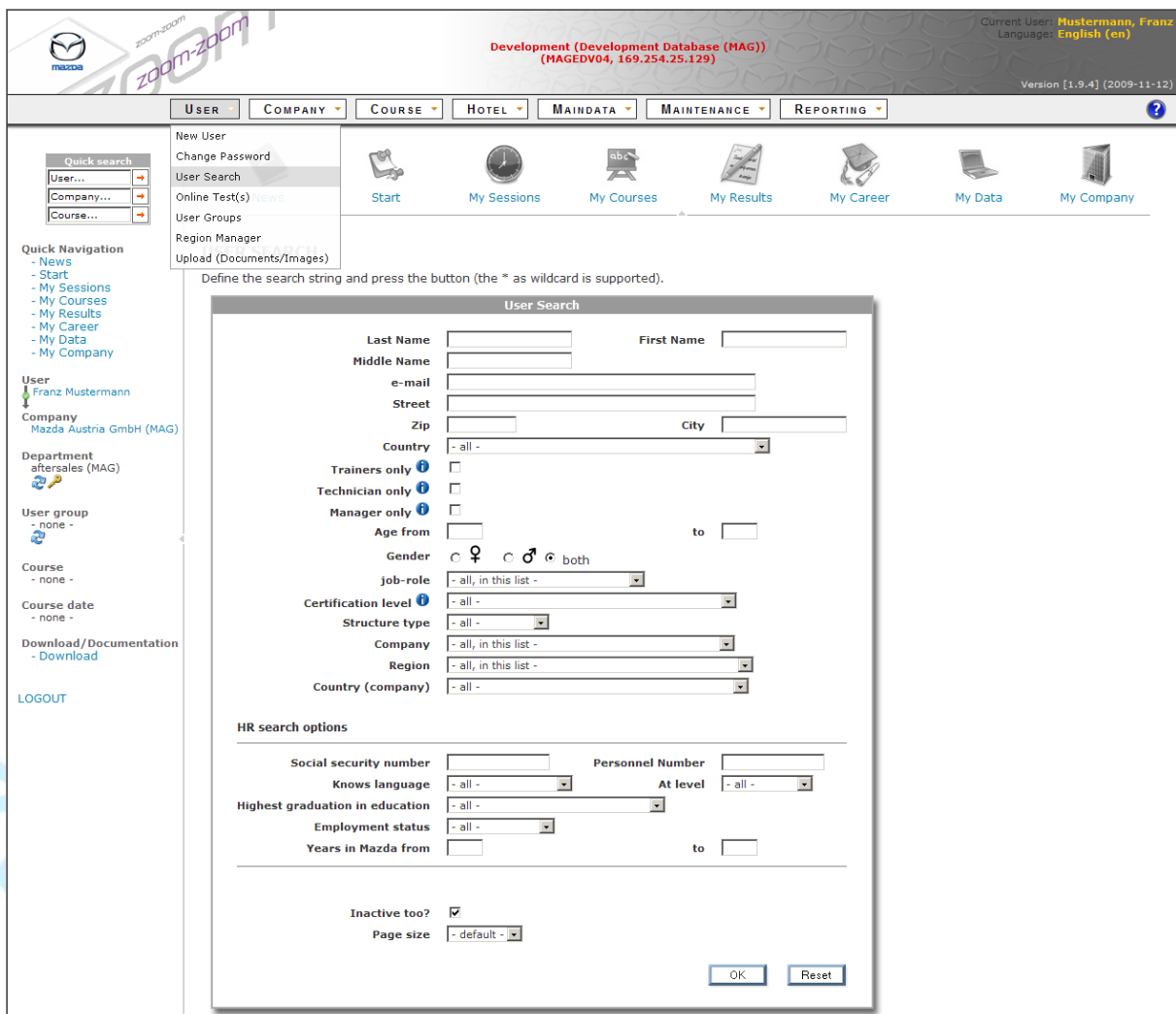
Searching, Part 2

Once you become more familiar with eTAS, searching will become an integral part of the functions. You can either use the "Quick search" on the left or choose the search option in the various menus. All search interfaces work similarly. You can use the asterisk ('*') always as a wildcard (which means that the asterisk substitutes any character sequence, regardless of the length. For example the search string 'au*t*a' would not only result in 'Austria' but also in 'Automobile for sale'.). If you want to search for a name for example, it is better to search only for one expression (surname or forename) and not more.

3.3   Exercise: User Search

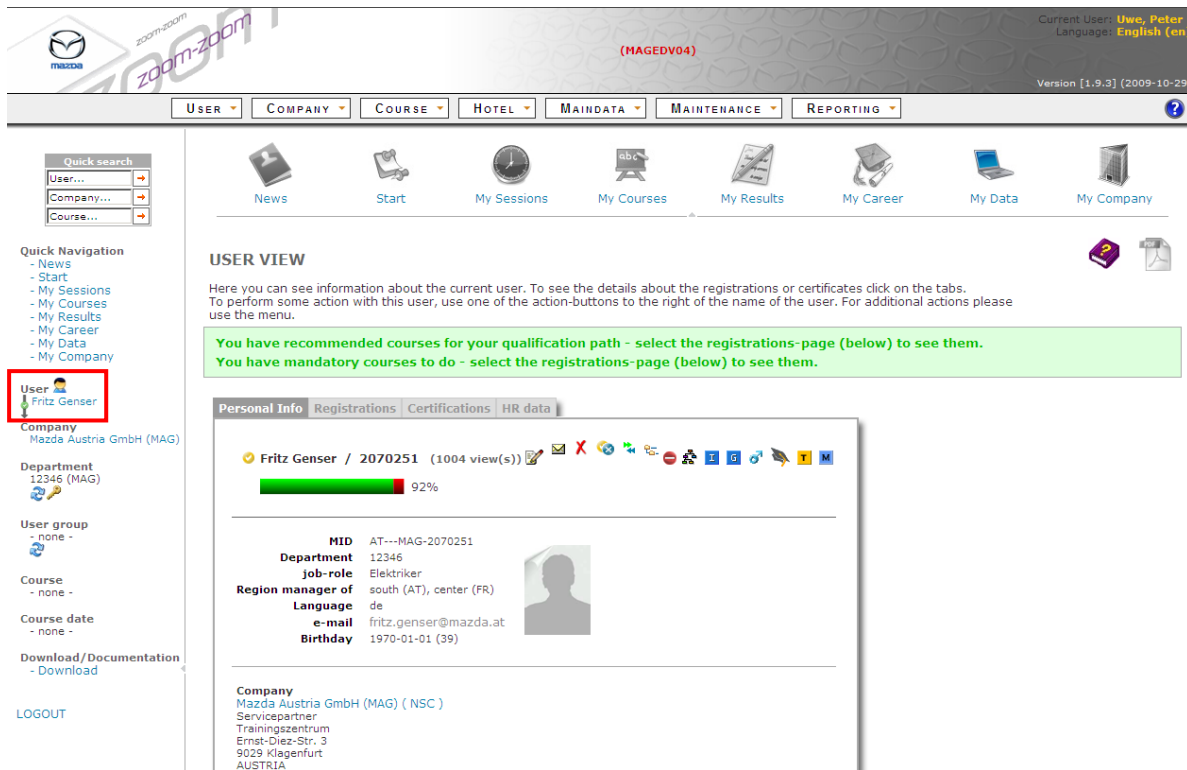**Go to the "User" menu and click on "User Search".**

Fill in or leave fields blank to restrict or broaden the search. You can enter partially known strings as well. For example, if you are looking for a particular user but have forgotten his/her name, however know that she has an Austrian Mazda email; enter "mazda.at" in the e-mail section and press the "OK" button.

Choose any user from the search results, by clicking on his or her name.

Take note that the current user on the left side has changed to the user you chose. Until you choose another, you "are" this user regarding course information, test results, enrollments and so on. This does not affect your "Current User" (see on the top right). Click through the quick navigation, to see the users' individual courses and proceedings.

Company Search

The next thing we will try is to narrow our search until we find what we want.

3.4 Exercise: Company Search

Click on "Company" and "Company Search" and press "OK".

The results list should be a few hundred or even a thousand entries (depending on your test environment). Not what we are looking for.

Search all companies in Austria.

To narrow the results considerably, we go back to "Company Search" and choose "Austria" from the country list. Now there are only a few hundred results, however this is still too many. At this time we want to refine the search again by adding "ma*" to the "Company name" field:

Search all company names beginning with "ma" in Austria.*

You can use the wildcard search function to narrow your results. Therefore a common property has to be used in terms of name, zip code, address or e-mail.

Now there are only a few results remaining, which should look something like this:

SEARCH RESULT (COMPANIES)

11 entries found, displaying all entries.

No.	Company name	Type	O-Type	ISO	Address	Street	Region
104	Maierhofer	Händler	dealer	AT	2542 Kottingbrunn	Wr. Neustädter-Straße 68	
35	Manfred Kriechbaum	Händler	dealer	AT	4850 Timelkam	Oberthalheim 33	
257	Manfred Moser	Händler	dealer	AT	8570 Voitsberg	Grazer Vorstadt 77	
161	Marko	Händler	dealer	AT	8430 Leibnitz	Marburger Straße 25	
14	Markus Gattinger	Händler	dealer	AT	4690 Schwanenstadt	Rüstorf 81	
156	Markus Schildberger	Vertriebspartner	dealer	AT	9141 Eberndorf	Loibegg 18	
80	Martin Raffetseder	Servicepartner	dealer	AT	4594 Grünburg	Hönigfeld 1	
51	Matisovits	Händler	dealer	AT	7535 St. Michael	Obere Hauptstraße 101	
5	MATTHIAS KLEINBERGER	Händler	dealer	AT	9500 VILLACH - SÜD	AUENWEG 17	
MAG	Mazda Austria GmbH	Servicepartner	NSC	AT	9029 Klagenfurt	Ernst-Diez-Str. 3	south
MCSEE	Mazda Central and South East Europe		Region	AT	9020 Klagenfurt	Ernst Diez Strasse 3	

Export options: CSV | Excel | XML | PDF

The next step will be to sort the list. Look at the headers on the list. The "Company name" is darker than the other labels. This means the list is sorted by this column. By default it is in

ascending order. Look at the other headers and click on "Address". Now the results will be reloaded and the list should now be sorted by address. Click again on the "Address" label to sort the results in descending order.

Click twice on the "O-Type" label, to sort the results by this column in descending order.

One of the first entries should now be "Mazda Austria GmbH".

Select "Mazda Austria GmbH".

Navigation

Although eTAS has a vast database, navigating through it is an easy task. As you will see, most of the pages are interwoven with links. This will be our starting position:

1. These are navigation tabs. You can click on any tab to change the content.

2. These are action and information icons. On action icons you are able to click; performing the underlying action. Information icons on the other hand show additional information about this object (e.g. technician, course provider and so on).

3. This is additional information about the object.

On this page alone there are three links to other objects: one to the "Parent organization", one to the "Market" and one to the "Region manager" of this company.

3.5   Exercise: Company Navigation

Click on "Employees" in the Company Information sheet.

You will get a list of users associated with this company. In the third tab "Registrations" you will find all course registrations for all employees in this organization. In this case this will be a lot of data sets. Try to sort them by clicking on "Status" to see who has already passed a course. Click back to "Employees".

Some of the employees already have one or more qualifications like Master Technician or Service Receptionist.

Scroll through the list of employees and click on any name

Now your screen should look like the following figure:

1. Notice, that the User on the left has changed to whom you selected

2. This is a system information message indicating that this particular user has some courses to fulfill, either because they are mandatory or because of his qualification path. Other users won't have such messages.

3. Personal information about the user.

4. This shows some information regarding which company this user is associated with.

5. These are the assigned roles. Some user don't have any roles, some have more than one. For now: roles define how much you can do within eTAS. For more information see Roles.

6. Some users are assigned to different departments. This defines which department the user may add new courses in.

If you click back on "Mazda Austria GmbH", you will return to the company information page. Please note that the user on the left remains the same. Click on it to get back to the user or select a new one from the "Employees" tab.

3.6   Exercise: User Navigation

Click on the "Registrations" tab in the user view.

These are the enrolled courses of the user you selected. If he or she has not registered on any courses by now, go back to the company and select another user.

Click on any course date inside the "Course registrations"

1. Please note once again, that the corresponding course name is updated one on the left side

2. Also the course date is updated with the course you selected

3. This is the subscriber list with all enrolled users and many action icons. They are explained a little later.

Find your selected user in the subscriber list and click on their company (Mazda Austria GmbH).

You have returned to the first page in this chapter. You could also have clicked on any other company or user in the subscriber list to browse through the various data stored in eTAS. With the navigation bar on the left side, you can navigate more easily:

Click on the "Course date" on the left side to return to the previously selected course

With the quick navigation you can access all previously selected data. Browse once again through the course information. Select the course and choose another course date (if available).

Finally, return to your own information page.

3.7   Exercise: Select own User

Click your current user in the top right corner of your browser.
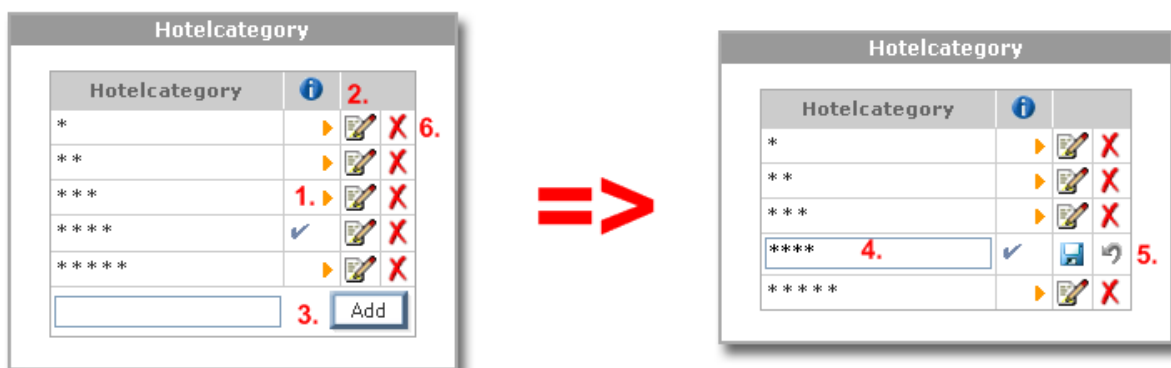
4 Basic Creation and Editing of Objects

In eTAS there are about two types of objects that the user can create, edit or delete: simple and complex ones. This chapter gives an overview on how to handle such objects.

Simple Objects

Simple objects are often used for option lists. They rarely have more than one entry. The hotel categories can be found under "Maindata" and they are one example of simple objects. They are used as selection lists, when creating or editing hotels:

Please note that in the "Category" pull-down list there are five available options. These options can be edited in another menu:
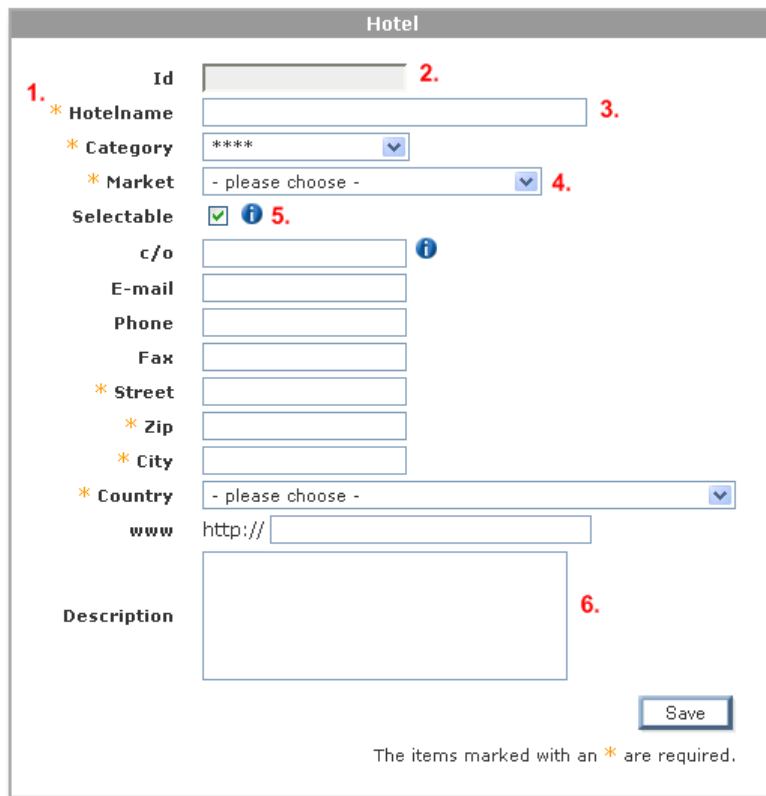
1. With this orange selector you can define which option is preselected in the shortlist. In this case, the four asterisks are chosen, so any new hotel will have this option pre-selected.

2. By clicking on this icon (✎) you can edit the corresponding line (continue at 4.)

3. If you wish, you can enter a value to the empty field at the end of the list and click on the "Add" button.

4. If you click on the edit icon, the line will change to an input field, so you are able to edit the data.

5. Click either on the save icon (the disk) or the cancel icon to withdraw the action.

6. You can also click on the delete icon (✗) to remove the value. If the value is in use, eTAS will give you a warning that you can't delete the entry yet.

Complex Objects

Complex objects like users, companies, courses, hotels and so on consist of more editable fields. There are various types of fields; some of them are explained within this example screen:

1. All fields marked with an asterisk are mandatory. eTAS uses these fields for reference to other objects or statistics, so therefore they are required.

2. You are unable to enter information into the grey fields as these are filled by the system when you save the object for the first time. Normally this will be a unique identification.

3. A normal text field. You may enter any character or – in some cases – only digits. One exception is the date field: either you use the calendar icon (🗓) to choose a date or enter it manually in the predefined pattern "yyyy-mm-dd"

4. This is a drop-down list. You can choose only one entry from that list ("please choose" is also an option). At some point it may be the case that there is no option other than "please choose" anyway.

5. A checkbox can either be checked or unchecked.

6. This is a so called text area. These areas can contain multiple lines and are best for describing more complex content.

WHEN TESTING, KEEP IN MIND THAT YOU SHOULD USE REALISTIC NAMES AND VALUES. ESPECIALLY IN TRAINING GROUPS, YOU ARE NOT THE ONLY ONE WORKING WITH THE DATABASE. USE YOUR IMAGINATION TO ENTER OTHER VALUES FOR A COMPANY NAME THAN 'COMPANYNAME'! THERE WILL BE DOZENS OF THEM ANYWAY AND FINDING YOUR OWN WON'T BE AN EASY TASK AFTER ALL.

Every time you want to add or edit an object you have to confirm your input by clicking on the "Save" button. If you have any doubt or have changed your mind, you can cancel your entry by simply clicking on any menu item or link. The data will not be altered unless you click at least once on the confirmation button.

5   Creating Companies

In eTAS company entries are very necessary. Without companies you cannot add new users or create new courses. Even the hotels depend on companies.

So let's create our own testing company:

5.1   Exercise: Add a new Company

Go to the "Company" menu and select "New Company".

Enter all mandatory values and some additional ones to your company. At the moment the only restriction to the values will be that you have to choose a particular organization type and parent company. For the remaining fields choose realistic values (see previous chapter).

Enter all mandatory fields and select "dealer" in the "O-Type" list and choose "Mazda Austria GmbH" as "Parent company". Click on the "Save"-button to commit your input.

Congratulations on your new company! If you want your test company to thrive, go to the "Company" menu and choose "Departments" to add new departments. Find your organization in the drop-down list and add new fields.

Once you have added an entry, you can provide an e-mail address for other dealers to get in contact with you. Use the contact icon (👥) to add or edit e-mails.

Choose "Company Search" from the "Company" menu and find some companies which have a similar name like your own.

You can archive this by providing only a part of a string of your companies' name.

6 Creating Users and User Groups

Users are the second most important thing within eTAS. In this section, you will learn how to add a new user and how to create and edit a user group.

Users

6.1 Exercise: Create a new User

Click on "New User" in the "User" menu.

Adding a user is as simple as creating a company. Simply fill out all required fields and confirm your entries.

Fill in all mandatory and appropriate fields and select a company (preferably yours). Use your own e-mail address or leave it blank. Then, "Save" the new user.

There is another way to add a new user in the database. Find the company to which you previously assigned the user and click on the "Employees" tab.

Click on the green icon (1.) to add an employee to that appropriate corporation.

Add another user.

User Groups

User groups are very helpful. Firstly, you can register multiple users to one course without having to enroll every single user. Secondly, you can send an e-mail to the whole group without having to send it to every single member of the group.
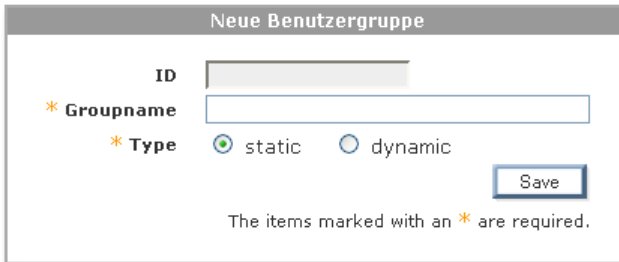
There are two kinds of user groups: static and dynamic. A static group will stay persistent until you change it again. The dynamic user group will change according to the specifics you defined in the user search: if you defined a group with all salesmen and a new user with the profession of a salesmen is added to the system he will be automatically in your group. Which type you choose is completely your decision. You can always edit or delete your groups.

6.2   Exercise: Create a User Group

Choose "User groups" from the "User" menu.

Provide a group name and choose a type. Click on "Save".

1. Here you can see how the new user group has changed the left side. If you click on the icon ⟳ on the left, you can access all your user groups. Click on the name on the left (e.g. "Trainer (5)") and a pop-up window will open to show currently assigned users.

2. Click on the group icon (👥) to open a user search interface. Now you can add other users. If you already have some in your group, click on the text in the "Content" section (e.g. "5 User(s)") to remove members.

6.3 Exercise: Add User to a User Group

Click on the group icon to add users to your group. Define a user search and add at least 14 users to the new group.

The next screen shows the procedure in a bit more detail.

USERSELECTION

Select/Deselect users from the list and click the "update-button" to modify your current usergroup. If you want to start a new search, please click the "lens-button". Choose the "next-button", when you have finished the userselection. You will be automatically redirected to the page, where you started the userselection from.

New Search: 🔎

19 Einträge gefunden, es wird Eintrag 1 bis Eintrag 10 angezeigt.

[Erste / Vorige] 1|2 [Nächste / Letzte]

			Name	ISO	Address	Company	
1.	☐	● ♂	dealer, test	AT	. ., .	Mazda Austria GmbH (807)	
	☑	● ♂	Enzi, Hermanni	AT	x x, x	Mazda Austria GmbH (807)	
	☐	● ♂	Genser, Fritz	AT	. ., .	Mazda Austria GmbH (807)	
	☑	● ♀	Guggenberger, Petra	AT	y z, x	Testhändler MAG	
	☐	● ♀	Höfferer, Ulrike	AT	x x, x	Mazda Austria GmbH (807)	
	☑	● ♀	Hofstätter, Christa	AT	. ., .	Mazda Austria GmbH (807)	
	☐	● ♂	Korak, Florian	AT	x x, x	Mazda Austria GmbH (807)	
	☑	● ♀	Krüger, Susanne	AT	bitte ergänzen bitte ergänzen, bitte ergänzen	Mazda Austria GmbH (807)	
	☐	● ♂	Mechaniker, Herbert	AT	1234 Teststadt, teststraße 3	SIEGFRIED KAPPACHER (1)	
	☑	● ♂	Münzer, Bernd	AT	x x, x	Mazda Austria GmbH (807)	

2. [Update]   [Next] **3.**

1. Check or uncheck the boxes, depending on which user you want to have as a member.

2. Click on the "Update" button every time you change the result list pages or you wish to end your action.

3. Click on "Next" to get back to the user group screen.

If your user search revealed less than 14 users, add some more anyways. Redo the steps above until you have added at least fourteen members.

Go to the "Course Registration" in the "Courses" menu.

You may now choose between a single user and your new group to process the registration or invitation to a course.

6.4   Exercise: Remove User from a User Group

Go to the "User Groups" in the "User" menu. Click on the "Edit" icon ✎ to edit your user group. Remove some users by clicking on the text in the "Content" column (e.g. "5 User(s)")

A detailed description for this task can be found here:

1. To edit a user group you have to click on "User Groups" in the "User" menu. There you can find all your created user groups. Press the ✎ icon to edit a user group.

2. Now you can click on the on the text in the "Content" section (e.g. "5 User(s)"). A window pops up which shows you all user in the chosen user group.

3. In this window you can select the users you want to remove. If you have finished you can press the "Remove" button and the action will be done. Finally, you can close the window and check if the user group is correct.

7   Courses and Dates

Courses are the most essential objects in eTAS. After all it IS an eLearning tool!

Prior to creating a course you have to understand exactly how courses work. After creating a course object it is an empty shell without course dates (just think of companies without employees). And exactly like an employee, a course date is an object of its own.

Here is a very simple overview showing how the different objects are connected to a course:
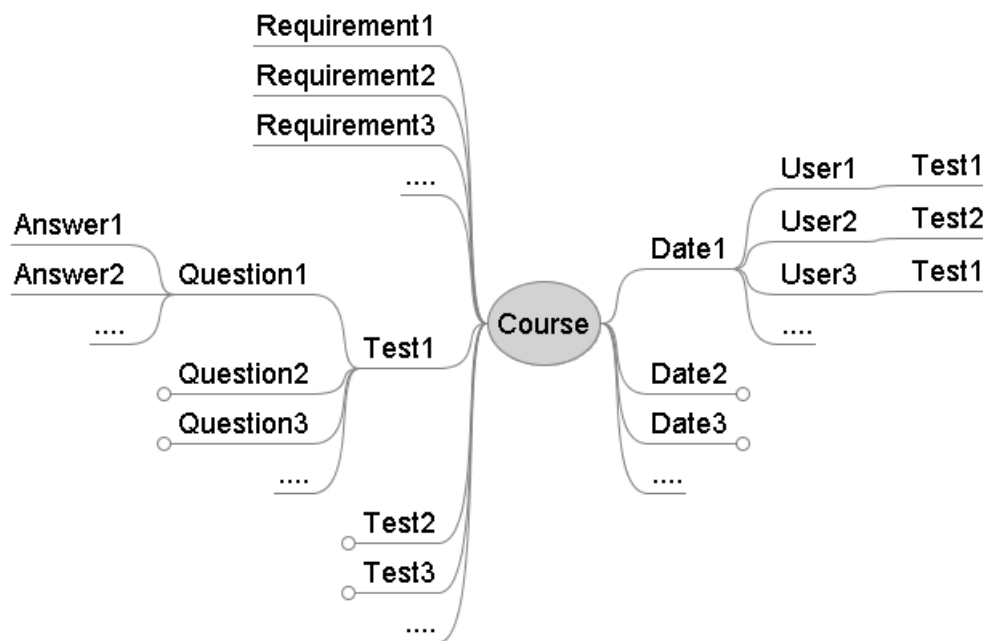
A course can consist of dates (training sessions), tests and requirements. Only real courses will have a date and the attendees of these courses will have to register on a date. If the course is a virtual one, than this is an e-Learning course. An e-Learning course can contain tests as well as SCORM material, but there are no dates for the registration as this training is virtual (e-Learning) and can be done with the PC. Lecturers can create tests for a course. Each test contains questions and possible answers. Please note, that only one test can be assigned to one user per course session. On the other side, different user can accomplish

different tests at a course session. In addition, it is mandatory that a course has some requirements for the attendees. This could be either restriction of the user to a certain company, career, country, region, certification level or a graduated course can be used as precondition. A combination of them would also be possible. These requirements are defined by the course provider and make it possible to decide who is allowed to register for these trainings or have access to the e-Learning material.

Creating a Course

7.1   Exercise: Add a new Course

Create a new course in "Courses" and "New Course".

To create a new course the current user who is logged in (see on the top right) has to have at least one department assignment. More information about the assignment of a user to a department can be found in the Expert Training Manual in Chapter "Department Assignment". If you belong to more than one department, select the appropriate one prior to creating a new training lesson.

1. The department you have chosen immediately affects the newly created course. If you are not part of a department, someone else can create the course and you have the possibility to input more information.

2. For every course you can upload a document. Often it makes sense to provide additional information to a course, for example an agenda. However, think twice when uploading data. Everybody will have access to it, not only those registered on the course.

3. Virtual courses should only be used for e-Learning courses, whereas the training documents and tests are only available online. Thereby you can't add any course dates nor register any users to a virtual course.

4. Moreover, you have to define the "Course Type". This determines if the course is used for e-Learning, training, conference or other types like these. The "Course Type"

is used as a criterion to narrow the course search. If the course is an e-Learning course, you should define the course type "e-Learning"

5. The "Course Form" specifies how the course is organized (e.g. in a group, a workshop or another form). However, the course form is also used as a search criterion. If the course is an e-Learning course, you should define the course form "e-Learning"

Fill out the course form, check the active box and leave the virtual option unchecked. Click on the "Save"-button to create the course. When it has been saved, click on the "view"-button (the one with the lens).

1. The quick link on the left side has changed to the new course

2. Using these action icons you can do various tasks. From right to left, the icons are:

   - the edit icon – to edit the course

   - the delete icon – to remove the course

   - the new course date icon – to create a new course date

   - the course tests icon – to define new course tests

   - and the image upload icon

3. With this action icon (⚠) you can add restrictions to your course. For example only users from a particular country may register or users who already participated in another course.

4. At this time there are no users on the waiting list for another course date.

7.2 Exercise: Register to a Course

Click on the "Register" button on the course information page and register yourself to the waiting list on your own course. When done, return to the course information screen of your newly created course.

Now there should be one user on the waiting list and an eye icon (👁). You can click on it to see which users are on the waiting list. Afterwards return to the course information screen.

7.3 Exercise: Add Requirements to a Course

Click on the "Course requirements" icon (⚠) on the course information page.

A pop-up window will open and show you all possible restrictions.

Requirement has been successfully created.

1. Here you can choose the type of restriction. They are predefined and include nearly all areas like certification level, company, country, course, job role, user and more types like these. For example you can specify if the user should come from Austria (country) and should be a mechanic (job role). If you choose a country, the country from the assigned company of the user will be taken into consideration!

2. The drop-down value list will change depending on which type you choose. For example this specifies the company.

3. The filter field can be used instead of the value list. In combination with the type "Country" you can use a wildcard search like "A*" (filter) to allow all users to attend

the course who meet this requirement. Only users who belong to a country, which name begins with the letter "A" like Austria, Australia, and so on, are allowed to attend the course. The asterisk ('*') substitutes any character sequence regardless of the length.

4. Add your restriction with the "add" action icon (➕). If you have already defined a restriction, there will be a red "delete" action icon (✖) instead.

5. After some requirements have been added, you can see how much user meet these requirements and are able to attend the created course.

6. The preferences characterize how the requirements are applied. There are currently three items: the "Course concatenation", the "Certification level concatenation" and the "e-Learning concatenation". These define how types like "Course", "Certification level" or "e-Learning" are treated, if you define more than one restriction of the same item. Additionally there are two options for the items: "AND" and "OR". The "AND" option means that the user has to meet all restrictions of the same type. For example you can choose two courses as a prerequisite for your own course. If you choose "AND" the user must have completed both courses. Otherwise if you choose "OR", the user must only fulfill one condition.

Now we want to illustrate this on two examples:

- The certifications levels "Technician" and "Senior Technician" have been added to the course. Afterwards, the "and" preference for the "Certification level concatenation" has been chosen. Only users, which own both certification levels, can now attend the course.

- That time we add the courses "Mazda 3 General Training" and "Mazda 3 MPS General Training". For the preference "course concatenation" we choose

"or". Thus, users, which have attended both courses, can now register for the newly created course "Mazda 3 Technical Training" for example.

In general, if you define more than one restriction of the same type (except "Course", "Certification Level" and "e-Learning) the concatenation will be treated with the "OR" option. E.g. you can specify that the course attendees have to be mechanics (job role), and should come from Austria (country) and Germany (country). If you add both countries the mechanics can be from Germany **or** Austria. The preferences are only valid for the three mentioned types.

7. The "Save" button only saves the preferences section! All restrictions are automatically saved when you add or delete them.

Choose "Company" from the restriction "Type" and define a company (preferably your own). Press the add icon (✚) and close the pop-up with "close window" at the bottom.

The main screen should now reload and the requirements should have changed to something like this:

Target group/Course requirements   1 Requirement(s) 🔵 ⚠️ 🟢

The first icon after "1 Requirement(s)" shows you whether or not your currently selected user meets this requirement. It can also be red, indicating that the user is not qualified for this course. With the right action icon you can get a list of all users who meet your restriction.

Click on the "check course requirements" icon (🟢) and register another user to your course.

There should be at least one other test user.

Course locations

Before we can create a new course date, we have to define where the actual training will take place. So we must first create a course location and rooms.

7.4   Exercise: Add a new Course Location

Go to "Main Data" and choose "Course Locations".

You'll receive a result list with all current available course locations. You may apply a company filter or browse through the results. If you can't find the desired course location in the result list, you can add a new one as described below.

Click on the "Add new course location" icon (⬜) and fill out the empty field. If you wish, you may choose a test company (preferably your own). Should the location be available for training sessions, you have to check the "active" box.
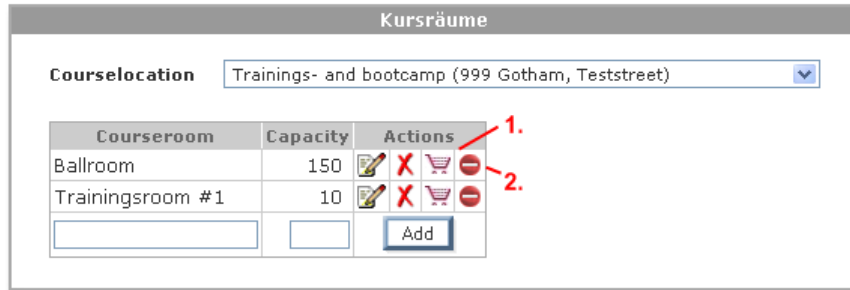
You can now add some rooms to your newly created location (see exercise 7.5). Before you create a room, you should check whether the desired equipment type is available in eTAS. Therefore go to "Main Data" and click on "Equipment of Course Rooms". Add some items that should be present in a teaching classroom.

7.5   Exercise: Creating Rooms

Click on "Course Rooms" in the "Courses" menu. Choose your location and add some rooms.

1. With the equipment icon (🛒) you can add things to your course room. A pop-up screen will appear where you can choose from the list of "Equipment of course rooms". Click on "Save" to save the data. Lecturers will now know what they can expect from the location.

2. With this icon (⛔) you can block this room for any period. Use this if the room is only partially available or some other courses, which are not managed by eTAS, are taking place.

Adding a Course Date

7.6 Exercise: Generate a new Course Date (Training Session)

Go to the "Courses" menu and choose "New Course date". Fill out all form fields and save the new date.

For the course date choose a location where the course will take place. It can happen that the selected location has no course rooms. If so, ignore this. If the location has a room the quota will be filled automatically otherwise you must state how many users may attend.

As soon as a new course date is created all users on the waiting list will receive an e-mail with the updated information.

If you wish, you can now register your user to the new course date. A fast way to do this is to click on the selected user on the left, click on "Registrations" and then click on the "Register" action icon 🖻 in the "Courses on waiting list" section (available if you have done the steps described in exercise 7.2). Otherwise you can go to the "Course Registration" in the "Course" menu.

E-Learning Courses

E-Learning courses are one of the core parts of eTAS, if not the most important. Such courses provide professional, revised content and enable users to learn on their own. The user no longer needs a lecturer. Also, one does not have to travel to an education facility as the user has the opportunity to go through the course whenever and wherever!

In future, there will be many courses in eTAS and in the next few steps you will learn how to create and then access e-Learning courses. Available e-Learning courses look like this:
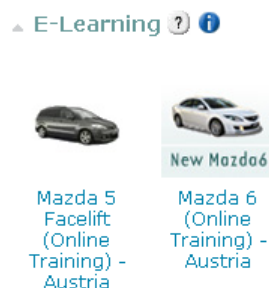
You'll find them in the e-Learning section on your start page. An e-Learning course is a special kind of course. It is created just like any other course, however with some exceptions:

COURSE INFORMATION

Here you see the details of the selected course and the provided coursedates.

Mazda 5 Facelift (Online Training) - Austria (M5FL*MAG) 📝 ✗ 🔖 ⓘ 🏠 **1.**

Courseprovider	marketing (Mazda Austria GmbH (807))
Costs	0.00 EUR
Duration	
Virtual duration	
Active	✓
Course material (SCORM)	🎇 (Count: 1) **2.**
Target group/Course requirements	1 Requirement(s) 🟢 ⚠️ 🟢 **3.**
Coursetype	E-Learning (Online)
Courseform	E-Learning (Online) **4.**
Officer	Susanne Krüger
Flags	
Comment	
Optional document	- no document found -

1. When creating the course you must define the course as "virtual"! Hence the course does not have any course date or course registrations.

2. After being created, you must upload standardized SCORM material (see http://en.wikipedia.org/wiki/SCORM for more details). This material is specially tailored, mainly by external parties. Upload the whole package using the SCORM action icon (🎇).

3. An e-Learning course must have at least one requirement. Generally this will be a country based restriction, because of the different SCORM language packages. However, it could also be the successful completion of another course which is required prior to registering on the selected course.

4. The course type and form should both be "e-Learning".

7.7   Exercise: Complete an e-Learning Course

Select an e-Learning course from your start list and browse through it. Complete the quiz afterwards.

Mandatory Courses

With mandatory courses you can force a user or user group to take part in a course. If you do this, the user will receive an e-mail and every time he/she logs in will get a system message.

Course Registration

This section describes how a user can be registered on a course date. We will use existing objects; the creation of either user or course is described later on in the document.

There are five basic steps to register a user to a course:

1. Select a user or a user group
2. Select the desired course and date
3. Select a hotel, if necessary
4. Review your registration and set a course fee
5. Confirm your registration

Sometimes it is possible to skip a step. For example, if you put a user on a waiting list, there will be no need to book a room.
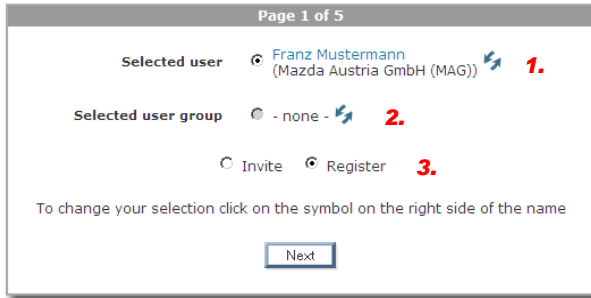
7.8   Exercise: Register to a Course

Go to the "Courses" menu and click on "Course Registration".

You will see this screen:

1. Please note that the "Selected User" matches the user on the left-hand side of your browser.

2. If you have previously created a user group, you may choose between registering a single user or an entire group of users. The steps to create a user group are described in a previous chapter.

3. You can choose to "Register" the user or just "Invite" him/her to join a course. The difference is simple: if you register a user, the course is seen as mandatory and he must take part. If you invite him, he has the option to decline the course. Users with limited permissions can't invite themselves to a course.

4. These are the steps that need to be taken to go through the course registration workflow. The orange background behind a number indicates the current progress.

It is possible to select a different user or user group by clicking on the "change" icon ( ). This will initiate a user search interface in which you can specify search parameters. Click on the "OK" button to start the search. A slightly different search result list will come up:

1. Click again on one of the "change" icons to select the desired user, or

2. Click on the "Cancel" button, to abort the current operation

Either way, you will return to the previous screen – the first step of the course registration.

Now we want to register the selected user. This way we have to go through all steps of the registration. Click on the radio button in front of "Register", if it isn't already marked.

Click on the "Next" button.

1. Once again, the previously selected course on the left side is already preselected in the course drop-down menu. If you haven't selected a course by now, you may now choose one. Some of the courses may already be inactive, meaning they are not supported right now and no new course dates will be available in the future. Don't register users to inactive courses, unless for testing reasons.

2. The course date is also preselected, if you have one in your quick navigation bar. In this drop-down menu all available and previous course dates can be viewed. There is also a "Waiting list" option. If a user is put on the waiting list he will automatically be notified when new course dates are available.

3. In this case the course has one or more restrictions. eTAS informs you with the green message and the green icon at the "Requirement check", that the user meets the requirements. If he or she does not meet the requirements, the message and the icon will be red. Click on the "Details" beside the icon to see why this particular user meets or doesn't meet the restrictions. If there are no requirements defined to the course, nothing will be shown.

Choose a course and a date and click on "Next".

On the next page you can book a hotel for the participant. When created, the course administrator can filter the list of available hotels, to ensure that not all registered hotels in eTAS may be chosen from the list.

The booking dates are filled with the corresponding course dates automatically. You can also manually change the booking dates, to extend or reduce the users stay.

Select "no hotel" and click on "Next".

COURSEREGISTRATION

The courseregistration is divided into 5 steps. Follow the description of each step (see the right hand side) to register a user to a course.

You can now review the data before finally registering the user. Additionally you may enter a comment.

1. Administrators may overwrite the restrictions of a course by selecting "yes" to 'ignore course requirements'. This shouldn't be done without thinking about it, as these requirements are often put in place for a good purpose.

2. Eventually, the participant must be charged. You can enter any positive amount. This option is compatible with the sundry billing standard of Mazda.

Click on "Register" to finish the registration.

The registered user will receive a confirmation e-mail from eTAS and the course will be displayed under the users' registrations. You can check it by clicking on "My Courses" in the quick navigation bar.

Subscriber List

Once there are many participants to a course date, either the lecturers, the officers or the administrator is able to use the multiple functions for the list of users.

7.9 Exercise: Look over the actions of the subscriber list

Find your course date and click on the information screen.

The section with the subscriber list shows all users who have registered on this course date. The following icons will help you to administer the list and perform useful actions (the icons are always described from left to right):

The print action icons (🖨 📋 🏵) allow you to print a participant list for offline usage, print course stickers for name tags or seats and to print certificates for all users who have the "participated"-status.

The second section deals with mail options (✉ ✉ℹ ✉ 🐦). With the first icon, you can send an e-Mail with individual text to all participants. With the second you may send an automated information e-mail to the companies linked to the user, regarding course information, cancellation fees and all subscribed users. The third icon sends the subscriber list to a freely definable list of receivers and with the last icon you can send e-mails with the supplied booking information of the users to the various hotels.

The reminder icons (🔔 🔍 📣 🔍) let you send a message to all participants regarding their open invitations (🔔) and/or their open online tests (📣). Only relevant users will get the e-mail. For example, this means that only those users who still have an open test will get the message. Those who have already completed the test will not receive the mail. The magnifying glass opens up a logging screen which displays the recently performed actions, enabling you to see when you – or somebody else – sent the last reminder to the group.

At some point you may want to change the status of the participants. In this screen there are two ways of doing this: either change the status of all participants (in the row with all other action icons) or individually change them (at the action column for each user). Use either icon (👤 ✓ 👑) to change the status to "confirmed", "participated" or "passed".

Using the speech bubble (💬) you can send an e-mail to all subscribers who have at least participated and also request their feedback. When they log in the next time they can fill out a standardized feedback sheet. The answers are statistically available in the report section.

By using the action icon (📋) you can assign online tests to participants. When you click it, a pop-up window will appear where you can assign the online test, choose one or all users and assign a due date.

By clicking on (⚒) in the actions column you can mark a user without the need of an online test result. Just fill out the points he or she "scored". Note, that this will not change the status of the user.
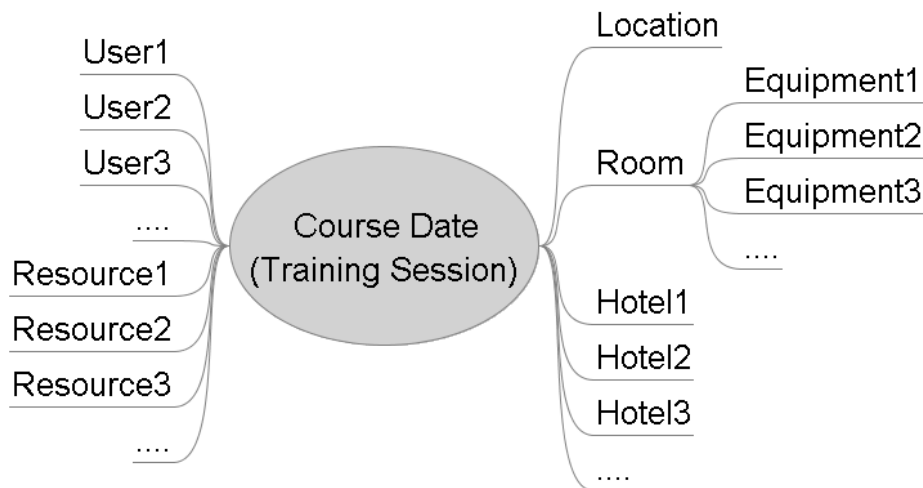
Last but not least, you can remove a participant from the list with the delete icon (✗).

Practice with at least one icon in each group (print, e-mail, reminder …) and manually grade a participant.

8   Additional Information

On the next pages the relation between different objects will be explained in more detail.

Course Date (Training Session)

As mentioned before, the users are registering to a date. To each date some resources can be allocated. Resources are summarized in groups, and each group belong to a pool. More information about resources can be found in the expert training manual of eTAS in chapter two. Every course needs a location. A location is a place (for example a company) where the course takes place. On a location can be different rooms available, each of them provides certain equipment (video projector, overhead projector, internet access, DVD-player, loudspeaker, internet access and so on). However, the course date (training session) can only takes place in one room at the time. Moreover, it can be necessary that some users need a hotel room during the course. All this data is merged with the course date object.

Course Registration object
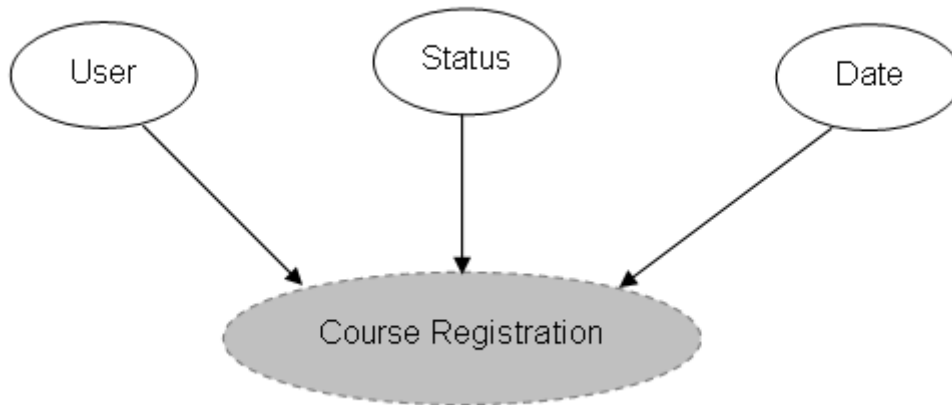
The most essential element for a course registration is the user, which inscribe to a course on a certain date. Thereby, the user can have the status invited, registered, confirmed, participated, passed, cancelled, waiting or mandatory.

User object
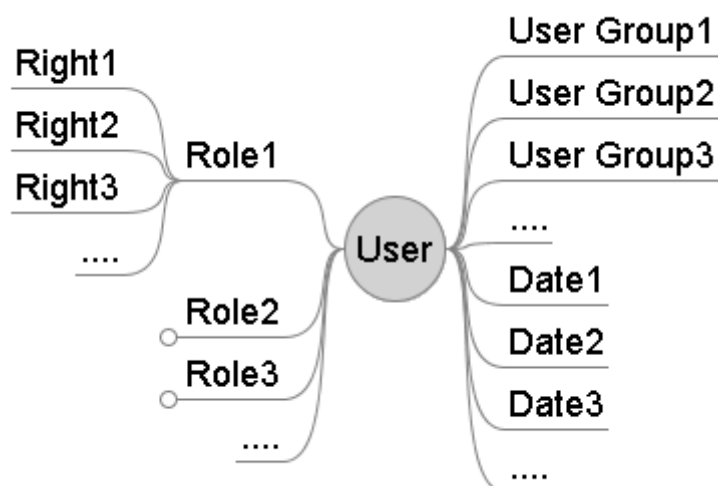
Users can be in a user group. They are used to manage tasks like a course registration easier. Therefore users with the same profession are group together for example. Aside from that, the user can register on a date for a course. To give the user the ability to change some settings in eTAS, every user has one ore more roles. Because employees, companies as well as course provider and administrator are adding, modifying and deleting data, different roles are needed. Each role has different rights. A right can be to create a course, test or a company. More information about roles and rights can you find in the expert training manual of eTAS in chapter six.

Company object
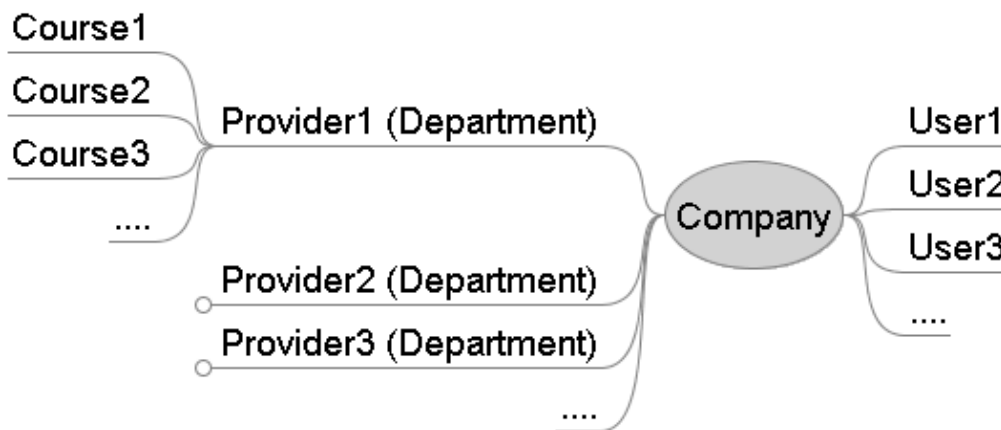
The company is one of the main objects of eTAS. All other objects like a user or a course, uses this object. If you want to view a report, you always have to specify the market (company) first. Each company has some users (employees) and departments. If you want to offer a course to other users, only the departments, you are assigned to, can be chosen. These departments are the course-creators, which provide courses to other users. Therefore they are called "Course provider".