


CPDOnline

QuickClick Guide for Managers

Switching to Manager Mode

1. Open Internet Explorer.
2. Type **http://training.cuna.org** in the Address box and press Enter.
3. Choose: CPDOnline under the Log In heading.
4. Enter your Student ID in the Student ID box.
5. Enter your password in the Password box.
6. Click **Log On**.
7. Click  to switch to the Manager mode.

Examples of Searches


- A single word – register
- Multiple words – class list
- A Phrase in Quotes – “Class Registration”
- Single search word with an asterisk wildcard character – class*
- Multiple search words with wildcard characters - class* acc*

Viewing Others' Training

1. At the left corner of the screen within the Getting Started box, click on **Select another user or your workgroup**.
2. In the Select User page that displays, select the appropriate direct report.
3. Click **OK**.
4. From the **Assess** menu, select **Training Analysis**.
5. From the View list, select the user's assigned training, such as:
 - All assigned training
 - Training assigned by job
 - Training assigned by organization
 - Training assigned directly
 - Training certifications
 - Completed assigned training

Note: You can filter the view to display required and recommended training.


Switching to the Workgroup View

1. At the top right corner of the screen, select .
2. In the Select User page, select **Workgroup of all viewable users**.
3. Click **OK**.

Registering Others for Training

1. Locate the learning activity from the catalog.
2. In the search results page, click **Register Others**.
3. In the Register Others page, select registration options such as the courses or exams.
4. Click **Next**.
5. To select and process users, click **Add**.
6. In the Select Users page, click the Select viewable users option and click **Next**.
7. Select the checkboxes next to all the users that you want to register (if all users are desired, click on the top box to select all) and click **OK**.
8. To add users to the roster, click the checkboxes next to all the users that you want to register and click **Send to Roster**.
9. Click **Done**.


Viewing a Managed User's Training Transcript

1. At the top right corner of the screen, click .
2. In the Select User page that displays, select the appropriate direct report.
3. Click **OK**.
4. From the Learn menu, select **Learning Activity Reports** and then click **Training Transcript**.

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