PETRO CLASSROOM

Corporate Account User Guide

Table of Contents

Accessing the Training Website

The Petro Classroom website is available at:
https://www.petroclassroom.com

The Petro Classroom training website is available at:
https://training.petroclassroom.com/

When you visit the training website, you'll see the training website landing page, as shown below.
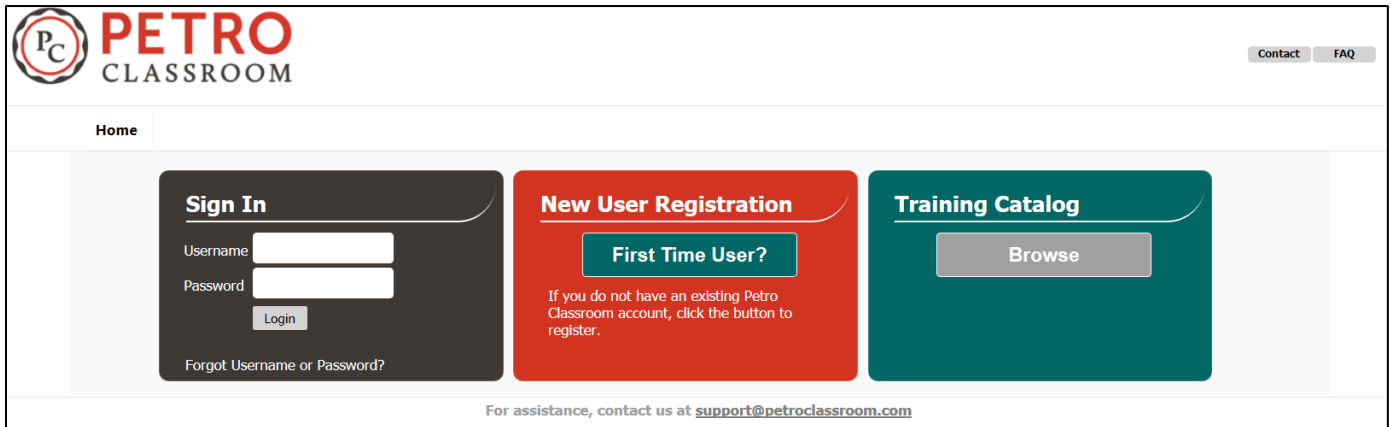
There are three tiles available from this page:

Sign In:
If you have an existing account with Petro Classroom, enter your Username and Password to sign in to your account.

If you have an account, but have forgotten your Username or Password, click the "Forgot Username or Password?" link to request that your account credentials be emailed to you.

New User Registration:
If you do not yet have an account with Petro Classroom, click the "First Time User?" button to register a new user account.

Training Catalog:
Click the Browse button to browse through the training courses available, and optionally begin the process of purchasing the training.

In addition to these three tiles, there are also Contact and FAQ buttons in the upper right corner of the page which can be clicked to get information about contacting Petro Classroom and getting answers to frequently asked questions about the website and training provided by Petro Classroom.

Using Your Account Homepage

After logging in to the training website as corporate account, you will see the corporate account home page (aka: My Training), as shown below.
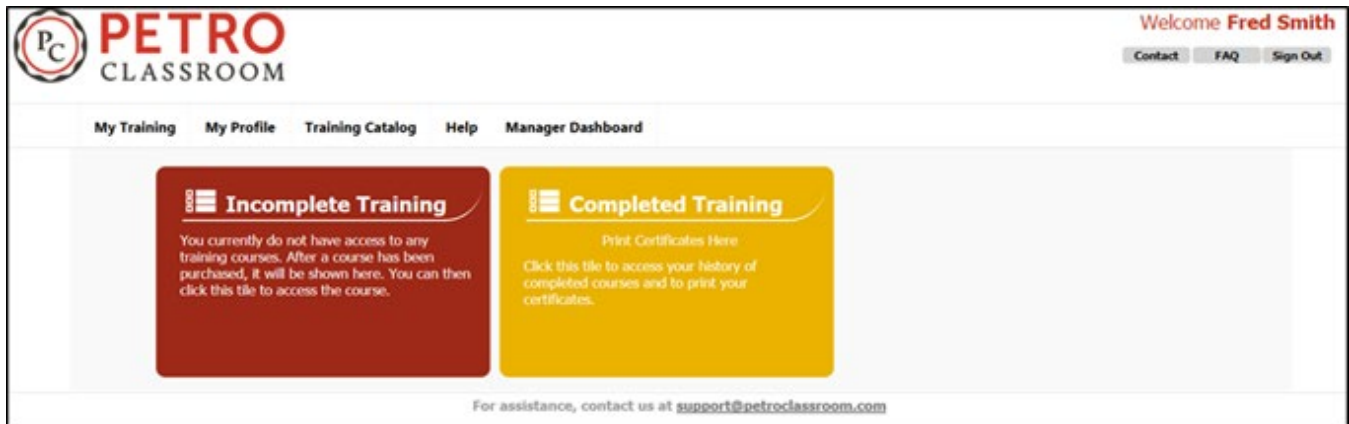
In the upper right corner of the page you'll see the same Contact and FAQ pages as were on the training website landing page. There will also be a Sign Out button to use to log out of the website when finished.

Below that on the page are five links and two tiles. These are explained in summary here, and in more detail later in this document.

My Training:
This link will display the corporate account home page and provide access to your training (if any).

My Profile:
Allows update of user account information.

Training Catalog:
Displays details of the training courses available, and allows purchase of the training courses.

Help:
Provides access to detailed help information about usage of the training website.

Manager Dashboard:
Provides access to the tools used to manage users and purchases within the corporate account.

Incomplete Training Tile:
Provides access to training that you have purchased for yourself, but which has not yet been completed.

Completed Training Tile:
Provides access to training history and certificates for your training which has been completed.

Purchasing Training

To purchase training for yourself or for users under your corporate account, click the Training Catalog link to access the list of available courses.

Petro Classroom offers two types of training:

Online Training:
This type of training is taken over the internet, using a computer, and can be taken at any time that is convenient for the user.

Classroom Training:
This type of training is held at a training location, and is instructor-led, rather than computer-based, training.

Shown below is an example of the Training Catalog.

At the top of the catalog page are various options for filtering the courses shown based on the following criteria:
- State
- Course Category (A/B Operator, C Operator, etc.)
- Delivery Method (Online or Classroom)
- Course Title

After selecting the desired criteria in the drop-down boxes, hit the search icon and a list of courses in the catalog that meet the specified criteria will appear.

Please note the following:

- You can click on the course title to get additional information about the course.
- Classroom courses will list the date and location that the course is held, along with the number of remaining available seats.
- There is a charge for most of our training. However, some classroom courses are provided free of charge, as long as the students meet state requirements to attend the training.

To purchase a training course, click the Purchase link to the right of the course to be purchased. (Free courses will have a Register link.) This will add the course to the shopping cart, as shown in the example below.

From the shopping cart page, you can do the following:

- Click the green Continue Shopping button to return to the training catalog to add more training to the cart.
- Click the red X by a line item to remove the item from the cart.
- Click the "Empty my entire cart" link to remove everything from your cart.
- Change the quantity of a course to purchase and click the Recalculate button to reflect the change.
- Enter a voucher number (if available) to apply a discount code to the purchase.
- Click the Proceed to Checkout button to go to the checkout page.

After clicking the Proceed to Checkout button, you'll be taken to the page where you can specify the method of payment.

Petro Classroom allows payment by Credit Card (via existing PayPal account or PayPal guest checkout) or Check. Select the desired payment method from the drop-down list.

Please note: If purchasing a combination of classroom and online training, you may only pay by Credit Card.

If you are purchasing only a free course, payment options don't apply. In that case, you'll have only an option of Paid by State.

Paying by Credit Card:

When paying by credit card there are two options:
1. If you already have an existing PayPal account, you may use the blue Log In button to log in to your PayPal account and proceed with your payment.
2. If you don't have a PayPal account or wish to check out as a guest, click the gray Pay with Debit or Credit Card button to proceed with your payment.

Courses paid for by credit card will be available immediately.

Paying by Check:

When paying by check you have the option of entering a reference number or purchase order number before placing your order.

Classroom courses will have immediate availability when paying with a check, however, your certificate will not be made available until we have received payment.

Online courses that were paid for by check will not be available until we have received payment.

Managing Training for Your Employees

The tools to be used by a corporate accountholder, to manage training for their users, are available from the Manager Dashboard link.

After clicking the link, you will see the Manager Dashboard tiles.
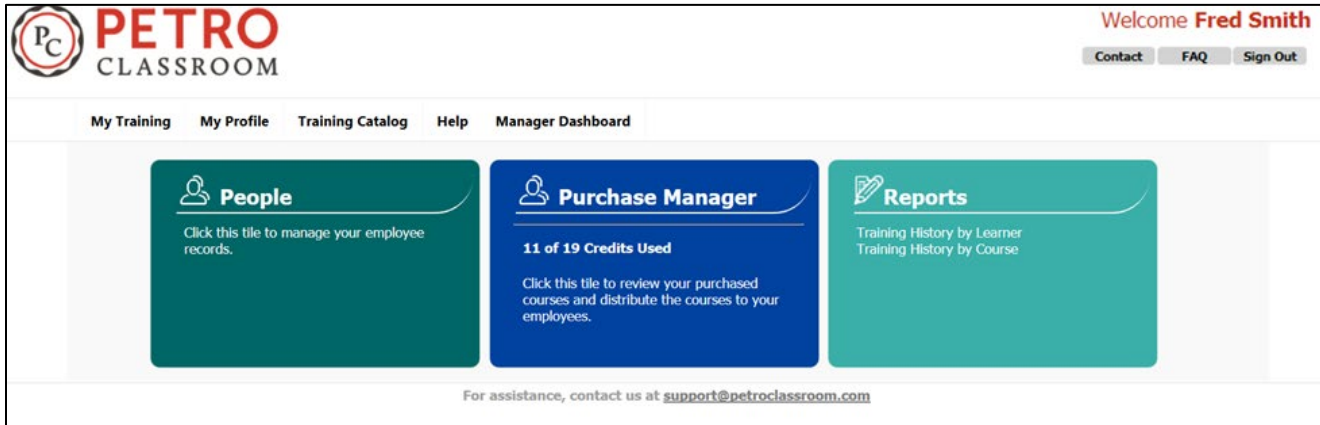
People:
Provides access to users under the corporate account and the ability to view/update user information and view the training history for the users.

Purchase Manager:
Provides access to purchase history for prior purchases and the ability to assign purchased training to users.

Reports:
Provides access to various user and training reports for the corporate account.

Managing Employees

To manage the users under the corporate account, click the People tile from the Manager Dashboard. A list of the users in the account will be shown.

The corporate accountholder account will be identified with "CorpAcct" in the first column. The other users will be individual users under the corporate account.

To send a "Welcome" email to the user, which includes their username and password, and the website address, click the Send Email link in the Action column.

If you would like to print a list of your employees, click the printer icon. Next to the printer icon, you will see a document with a plus sign. This allows you to download an Excel spreadsheet of your employees.

To manage a specific user, click the user in the Learner Name column, or click the green button in the Action column. This will display the Properties page for the user, which can be used to update the user's information. **Note: The users first and last name cannot be edited. Contact Petro Classroom support to have these values changed.**

Viewing Employee Training Status and History

Use the People tile to select the user for whom training status and history is needed.

Click the Learning Tracks tab for the user to see a page showing their training history, including both complete and incomplete courses.

For completed courses, the expiration date for the certificate (if any) will be shown. You can use the Print Certificate link to print the user's certificate for the course.

For incomplete courses, if the state requires entry of facility-related data, there will be an Enter Facility or Edit Facility link from which you can enter/edit the facility data for the user's course.

Viewing Training Purchase History

To view the history of training purchases for the corporate account, click the Purchase Manager tile.

A list of the purchases made by the account will be shown.

To view the purchase details for a specific purchase, click the order number in the Order ID column, or click the green button in the Action column. This will display the Purchase Item tab, which will show all the courses that were purchased in the selected order.

Click the Purchase Detail tab to see the order details, including the date, time, purchase amount, and payment method of the order.

Welcome Fred Smith

Contact   FAQ   Sign Out

PETRO CLASSROOM

My Training   My Profile   Training Catalog   Help   Manager Dashboard

Order ID 1810311344335150   Purchase Date 10/31/2018

Purchase Detail Purchase Item

Learner ID **LW000405**

Learner Name Full **Fred Smith**

Company Name **ABC Company**

*Order ID **1810311344335150**

*Purchase Date **10/31/2018**

*Purchase Time **1:45PM**

*Gross Amount 12.95

Discount Amount 0.00

Net Amount 12.95

Payment Method Check

Payment Date 10/31/2018

Number/Reference 1234

For assistance, contact us at support@petroclassroom.com

Please note that it is not possible to get a copy of a receipt for a prior order. Order receipts will be emailed to the accountholder at the time of the purchase, and should be retained for future reference. Much of the details shown on the order receipt are shown on the Purchase Detail and Purchase Item tabs, but not in the same format as is on the original receipt.

Assigning Training to Employees

After training course credits have been purchased, they must be assigned to individual users within the corporate account. This assignment of training is done from the Purchase Manager tile.

To start the process of assigning training to users, click the Purchase Manager tile from the Manager Dashboard.

A list of the purchases made by the account will be shown.

For the order containing the training to be assigned, click the order number in the Order ID column, or click the green button in the Action column. This will display the Purchase Item tab, which will show all the courses that were purchased in the selected order.

There are a few items to note on this page.

The Catalog Name shows the name of the course(s) purchased in the order.

The Quantity shows the quantity of course credits for that course that were purchased.

The User Authorization Code is a value that is unique to that course purchase. It is used in certain circumstances by individual users to get access to the training. This is discussed in more detail below.

Maximum Users shows how many courses were purchased/used (e.g., assigned to users).

The Action column contains three links to functions to associate the training course with individual users:

Invite New Users:
Use this option to have the website send an email to users inviting them to setup an account themselves and enter the User Authorization Code for the course into which they should be enrolled. **Use this option only for users that do not already have an account in the training website.**

Create New Users:
Use this option to create an account for the user and have them enrolled in the course. The website will send the user an email with their account and course information. **Use this option only for users that do not already have an account in the training website.**

Assign Users:
Use this option to enroll an existing user into the course. **Use this option only for users that already have an account in the training website.**

To determine which option to use when you want to grant training to a user, ask yourself the following questions:

Does the user already have an account in the training website?

Yes: Use "Assign Users".

No: *Do I, as the corporate accountholder want to create the account, or do I want the user to create their own account?*

    I want to setup the account: Use "Create New Users".

    I want the user to setup their own account: Use "Invite New Users".

The usage of each of these three functions is detailed on the following pages.

If any of the credits for the purchase have been assigned to individual accounts, then there will be an additional link entitled "List Users" shown in the Action column. Clicking this link will pop up a window showing the individual user accounts to whom the purchase credits have been assigned.

Using the Invite New Users Function:

Use this option to have the website send an email to users inviting them to setup an account themselves and enter the User Authorization Code for the course into which they should be enrolled. Use this option only for users that do not already have an account in the training website.

After clicking the Invite New Users link, the following wizard page will be displayed:

Purchase Item User Invite Wizard Step 1		
This wizard will guide you through the process of inviting people to register with Petro Classroom and use the courses that you have purchased.		
For each person to invite, enter their name and email address, and click the Accept link.		
An email will be sent to each of the people that you specify. This email will provide them with both the URL and unique Authorization Code that they will need to access Petro Classroom.		
Please complete this form and then click Next to continue.		
		MPurchaseItemInvite/Step1
Contact Name	**Email Address**	
Brett Black	blb@abccompany.com	**Accept Cancel**
Reset Next		

Enter the Contact Name and Email Address for one or more users to be invited to setup an account and be enrolled in the course.

After entering each user, click the Accept link for the line where the user was entered.

After all users have been entered, click the Next button.

A confirmation page will be shown, and an invitation email will be sent to each email address entered. An example of the email is shown on the next page.

From:	support@petroclassroom.com
Sent:	Monday, November 05, 2018 1:43 PM
To:	Brett Black
Subject:	Register for Petro Classroom Training

PETRO CLASSROOM

Dear Brett Black,

A course credit for the following training class has been purchased for you by your company:
Connecticut Online Class C Operator Course

To access the training course, you must setup an account on the Petro Classroom training website.

Click here to access the training website: https://training.petroclassroom.com

Click on the FIRST TIME USER button and select the Individual Account with Authorization Code option.
You will need to specify this Authorization Code when registering: 00232469799U

After setting up your account, click the course in the Incomplete Training tile to get the course details (for classroom courses) or to start the training (for online courses).

For help with your account and using the online training website, please click the Help button after logging in to your account.

If you need further assistance, please contact Petro Classroom at support@petroclassroom.com or 844-303-6752.

Sincerely,

Petro Classroom

After receiving the email, the user will need to do the following:

- Browse to the training website.

- Click the "First Time User?" button.

- Enter their registration information after choosing the registration type of "Individual Account with Authorization Code". They will need to enter the Authorization Code specified in the email.

- An example of this registration screen is shown on the next page.

New User Registration

Start the registration process by first selecting the Type of Registration. Note how the form changes based on selection you make. Password must be at least 6 characters long.

All fields marked with an * (asterisk) are required.

*Type of Registration:
- ○ Individual Account
- ◉ Individual Account with Authorization Code
- ○ Company Account

*Authorization Code: [   ]

*Username: [   ]

*Password: [   ]

*Confirm Password: [   ]

---

*First Name: [   ]

*Last Name: [   ]

Job Title: [   ]

*Email Address: [   ]

*Telephone: [   ]

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*Company Name: [   ]

*Business Address: [   ]

*City: [   ]

*State: [Select one   ▼]

*Zip: [   ]

SUBMIT CANCEL

<u>Using the Create New Users Function:</u>

Use this option to create an account for the user and have them enrolled in the course. The website will send the user an email with their account and course information. Use this option only for users that do not already have an account in the training website.

After clicking the Create New Users link, the following wizard page will be displayed:

Enter the information for the user to have an account created and to be enrolled in the course. Then, click the Next button.

A confirmation page will be shown, and a confirmation email will be sent to the email address entered. An example of the email is shown on the next page.

PETRO
CLASSROOM

Dear Brett Black,

An account has been setup for you with Petro Classroom, and a course credit for the following training class has been purchased for you by your company:
Connecticut Online Class C Operator Course

Please keep a record of your username and password, as shown below. You will need this information to login to your account on our online training website.

Here are your login credentials for the Petro Classroom training website:

Username: blbun1234

Password blbpw1234

Click here to access the training website: https://training.petroclassroom.com

After logging in to your account, click the course in the Incomplete Training tile to get the course details (for classroom courses) or to start the training (for online courses).

For help with your account and using the online training website, please click the Help button after logging in to your account.

If you need further assistance, please contact Petro Classroom at support@petroclassroom.com or 844-303-6752.

Please retain this email for future reference.

Sincerely,

Petro Classroom

After receiving the email, the user will simply need to browse to the website and login using the credentials shown in the email.

<u>Using the Assign Users Function:</u>

Use this option to enroll a user with an existing account in the website into the course.

After clicking the Assign Users link, the following wizard page will be displayed:

Select the user or users (ctrl-click for multiple users) to be assigned the course. Then click the Next button.

A confirmation page will be shown, and a confirmation email will be sent to the email address of the specified user(s). An example of the email is shown on the next page.

From:	support@petroclassroom.com
Sent:	Monday, November 05, 2018 1:48 PM
To:	Randy Hart
Subject:	Petro Classroom Course Registration

PETRO CLASSROOM

Dear Randy Hart

A course credit for the following training class has been purchased for you by your company:
Connecticut Online Class C Operator Course

Click here to access the training website: https://training.petroclassroom.com

After logging in to your account, click the course in the Incomplete Training tile to get the course details (for classroom courses) or to start the training (for online courses).

For help with your account and using the online training website, please click the Help button after logging in to your account.

If you need further assistance, please contact Petro Classroom at support@petroclassroom.com or 844-303-6752.

Sincerely,

Petro Classroom

After receiving the email, the user will simply need to browse to the website and login using their credentials.

Viewing Training Reports

To view reports detailing user and training history, click the Reports tile from the Manager Dashboard.

A list of available reports will be shown.

The following reports are available:

Learning Tracks By Learner:
Lists all users under the corporate account, and each learning track (class) for the user. Use this report to see the status of the training courses assigned to your employees (e.g., what courses are they enrolled in, have they started the training, have they completed it, etc).

Learning Track Expiry:
Lists all learning tracks (classes) that have a certificate that expires within the next 365 days. Use this report to see which employees have a need to be re-certified due to their certificates expiring in the near future.

Authorization Code Usage:
Lists all the classes that have been purchased, showing the authorization codes used within each (total credits, used, and available). Use this report to see which courses have a low count of authorization codes remaining, and therefore may require additional purchases.

To run a specific report, do the following:

1. Click the Report name to access the report filter page. Filters allow you to optionally restrict the data to be included on the report. Each report comes with a default "Show All" filter.

	My Training	My Profile	Training Catalog	Help	Manager Dashboard		

Select the filter you want to use for this report, or **Show All** if you do not want to use a filter.

Owner	Filter Name	Output Style	Output Format		Action
PUBLIC	Show All	Report	Learning Track Expiry	Show Filter Details	○ Select
Add New Filter					

2. To view the report, including all the records on the report, click the Select button in the Action column to the right of the report filter details.

   Otherwise, to restrict the records to be included on the report, click the Add New Filter button.

3. If the Add New Filter button was clicked, the Add Filter page will be displayed.

Filter On

Add Filter

Data Item	Operator	Value(s)	Delete?
Select Data Item to Filter On ▾			

Sort By

Data Item	Ascending	Descending
Select Data Item to Sort By ▾	☑	☐

Output Style and Format

Specify the style in which you want the output:	◉ Report ○ Grid
Specify the format in which you want the output:	Learning Track Progress By Person then By Track ▾

Confirm

If you want to save this filter, please enter a name to save it by.
If you do not enter a name, the filter will be saved temporarily until you set up another filter for this view.
If you do specify a name and a filter with that name for the current view already exists, it will be overwritten.

Name for Saved Filter:		Save Filter

This page allows you to do any of the following:

- Modify the data item filtering for the report. For example, including only certain users or courses, based on a variety of match criteria (equals, not equals, starts with, contains, etc).

- Modify the data item sorting for the report.

- Modify the style of the report output.

- Save the filter criteria for later re-use.

If a filter is saved for future re-use, when you access the report, you'll see the saved filter listed. From the screen, you can run the report using the filter (Select Action), edit the filter (Edit Action), or remove the filter (Delete Action).

You can also run the report with the default "Show All" filter or add a new filter.

	My Training	My Profile	Training Catalog	Help	Manager Dashboard				
Select the filter you want to use for this report, or **Show All** if you do not want to use a filter.

Owner	Filter Name	Output Style	Output Format		Action		
24877	SavedSearch	Report	Learning Track Progress By Person then By Track	Show Filter Details	○ Select	○ Edit	○ Delete
PUBLIC	ShowAll	Report	Learning Track Progress By Person then By Track	Show Filter Details	○ Select		
**Add New Filter**

Taking Training as a Corporate Account

Corporate accountholders can take training themselves from within the corporate account. They do not need to setup an individual account under the corporate account to take training.

In order to take training yourself, you will need to assign the purchased course you wish to take to yourself. The training will then show up under your "My Training" tile.

For information about taking training, refer to the Individual User Help document.

Updating Your Account Information

To update your account information, click the My Profile link to view the Profile window.

Most, but not all, of the account information can be updated.

Note that the first and last name on the account cannot be updated. This is done so that certificates cannot be faked by manipulating account information. Contact Petro Classroom for assistance if you have found an error in your name information which needs to be corrected.

To reset your password, click the Change Password icon near the top of the Profile page.

Getting Additional Help

If you need additional assistance with the Petro Classroom training website, there are various resources available:

From the website:

- Click the Help link for access to documentation.

- Click the FAQ button for access to answers to frequently asked questions.

Contact Petro Classroom support:

- Phone: 844-303-6752

- Email: support@petroclassroom.com

(This phone and email contact information is available from the Contact button at the top right of the website.)