

# Procurement & Administration

## Step by Step Guide for Implementing Interim Credentials v2

1. Connecting online:
  - a. Locate Resources at: <https://info.interimcredentials.com/>
  - b. Select “NEWS” to watch webinar on Procurement Process (summarized below)
  - c. Select “SCHOOLS” drop down and Click “Resources”
2. Resources Available (Check back regularly for new content)
  - a. Flyer
  - b. Organization Information Form
  - c. System Requirements
  - d. Cost Information
  - e. Interim Credentials Catalog
  - f. Video White List (*Organizations who block Vimeo need to allow these video links through the firewall for the course to work properly.*)
  - g. Cost Estimate Form Letter
  - h. Syllabus
  - i. Support Information (*Who to contact for what*)
  - j. Course Previews
  - k. Important Websites
    - i. electrical training ALLIANCE Bookstore
    - ii. ProTech Skills Institute Training Management System (TMS)
    - iii. ProTech Skills Institute Learning Management System (LMS)
3. Webinar Notes (See **bolded step by step directions beginning page 2**)
  - a. Focus: Procurement Process and Procedures
  - b. LMS will look and feel like legacy system, but with more “bells and whistles.”
  - c. Course is computer mediated and does not require an Electrical Instructor to proctor...but does help.
  - d. Improved version...same courses that training centers use.
  - e. Now: etA (content) and PTSI (access)
  - f. Better performance and easier navigation
  - g. Administrators will use new Bookstore to purchase licenses for the courses along with PTSI-TMS to purchase access tokens.
  - h. Administrators will receive login credentials to access the Bookstore along with LOGIN credentials for the TMS
  - i. May need to fill out a new Organization Information Form (if above is not received)
  - j. (See Resources above)
  - k. Cost: \$315 (per student) = \$189 etA + \$126 PTSI
  - l. Purchases remain in in your account until they are assigned to users
  - m. Bookstore: Purchase Content
  - n. TMS: Purchase access (tokens) to distribute content
  - o. Accounts will be invoiced immediately with 30 days to pay
  - p. Each user will need individual access – including teachers.
  - q. Access Tokens:
    - i. Three-week User Access Tokens (free) (one time only)
    - ii. Two-year User Access Tokens (to continue access)
    - iii. Can purchase both at same time.

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## **Step 1**

- a. Purchase I.C. Licenses from the bookstore
  - iv. Bookstore Log In page
    - 1. Click “All” to see content available
    - 2. Only required is Interim Credentials \$189
  - v. Bookstore Checkout: “Your Cart”
    - 1. Purchase Orders are required in advance to place an order
      - a. Cost Estimate Form Letter can be used if needed to generate P.O.
      - b. etA only needs the P.O. number, W9 and Organization Information Form (form is for new accounts, or current accounts who need to update account information)
      - c. Download, fill in and save
    - 2. Can save for later our Checkout
    - 3. “Terms” (Invoice) or Pay by (Credit) Card
    - 4. Shipping Information (required) (May already be loaded from Admin. setup)
  - vi. My Account page
    - 1. Can now see Balances, Open Invoices, Payments.....

## **Step 2**

- a. Purchase Tokens in the PTSI TMS
  - i. Login to PTSI TMS (via Resources page)
  - ii. Click “Roster”
    - 1. Click “Add User”
      - a. Last Name
      - b. First Name
      - c. Email
      - d. User Type – Choose CET for students, Instructor for Teachers)
      - e. Access Type – Will populate once access is given
  - iii. Purchase and Assign Tokens (Click “Manage/Assign Tokens”)
    - 2. Click cog drop down (top right)
    - 3. Choose “Purchase”

## **Step 3**

- a. Assign Access Tokens to users
  - i. Click “Manage/Assign Tokens” (Left)
  - ii. Click cog (top right)
    - 1. Choose assign
    - 2. Should be able to access free 3-week tokens
    - 3. “Assign Access Tokens” screen shows students available
    - 4. Uncheck and Recheck students to assign tokens
    - 5. Accept terms and conditions and Save

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- iii. See “Enrollment” screen. (lefthand menu)
  - 1. See students with checks
  - 2. Uncheck and Recheck
- iv. Chooses Courses (top menu bar)
  - 1. Choose “Interim Credentials”
- v. Enroll Instructors (top menu bar)
  - 1. Check “Interim Credentials”
  - 2. Check Teacher to be enrolled
- vi. Specify Session Name (top menu bar)
  - 1. Select new session name (or existing)
- vii. Specify Access Date (top menu bar)
  - 1. Set Session Access Start
    - f. Teacher early
    - g. Students later
  - 2. Verify Enrollments (top menu bar)
    - h. Teacher will have NO License if already enrolled in a different session.
- viii. Administrator can delegate role.
  - 1. Manage Administrators (left)
  - 2. Select Individual(s) “Edit”
  - 3. Edit TD Assistant pop up screen
  - 4. Select role(s)
  - 5. Admin Roles and Permissions
  - 6. Can also scroll down on left menu and select “Admin Roles/Permissions and edit or add custom roles

## **Step 4**

- a. Invoicing
  - i. Combined bookstore and tokens on one invoice
  - ii. Sent via email and available in bookstore account
  - iii. Token invoices will appear in account on a monthly basis

## **Additional LMS Information**

- a. Tabs
  - i. My Courses Tab
  - ii. Tools & Resources
  - iii. Reports
  - iv. Assessments
  - v. Help
  - vi. My Records
  - vii. Tools & Resources
- b. Quizzes and Tests proctored
- c. IC Online Materials

# **Procurement & Administration Step by Step Guide for Implementing Interim Credentials v2**

- i. Syllabus
- ii. Lessons: Student and Teacher Versions
- iii. Final Quiz Answer Keys (Whole Topic Assessments)
- iv. Lesson 50: Course Completion Certificate