# Table of Contents

- **Introduction**
- **Creating and Using Roles**
  - Learning Role Creation
- **LMS Admin Types**
  - Preloaded Admin Types
  - Content Admin Type
  - Learner Admin Type
  - Report Admin Type
  - Team Admin
  - New LMS Admin Type
- **Adding Learners to Teams**
- **Enroll Learners into Learning Roles**
Introduction
This guide discusses how to configure Teams to grant Users specific and limited access to Learners, Learning content and LMS Management features. Teams allow a single instance of the Accord LMS to support multiple clients or companies with any type of Learner training architecture.

Creating and Using Roles
Before we start creating our Teams we need to create roles to determine Learning Element/ Folder Access for our Leaners. The Learning Roles can then be used to select and enroll the Learning Content to our Learners.

Learning Role Creation
Learning Roles are created and managed in LMS Admin > My Team > Team’s Learners > Learning Role Management.

- Select Learning Role Management from your current team context menu
- The Learning Role Management screen displays
Filter by Role Group: Select a Role Group from the list to filter the list of Roles displayed. The Groups available to select from are determined by current Team.

The list refreshes to display the roles within the selected group

Click the Add New Role link.
- Name this Role “Sales Pros”

![Role Details](image)

- Click **Update** to save the new Learning Role

**Please refer to the “Learning Role Management” section of the “My Team” chapter in the Accord LMS Admin’s Guide for more information on working with Learning Roles.**

### LMS Admin Types

The LMS Admin Types define permissions and access for each LMS Admin. A User can only have one LMS Admin Type assignment per Team that they are members of.

Admin Types can be accessed via Team’s context menu:

![Context Menu](image)

The LMS Admin Types window displays
Magnifying glass icon: Clicking this icon will display the LMS Admin type details. The information displayed is read-only so any modification performed here will not be saved.

Enable: When selected, the LMS Admin Type will be available for the current team.

Pass Down: When selected, the LMS Admin Type will an option available for the child teams.

LMS Admin Type Name: Displays the Admin Type name.

Creator Team: Displays the Team name the user who created the Admin Types is member of.

Preloaded Admin Types
The preloaded LMS Admin Types grant specific features and folder access to the designated user. These LMS Admin Types can not be edited by any user or administrator. However, you can view any LMS Admin Type details.

Content Admin Type
This Admin Type provides access to the most basic LMS Admin > Catalog functions such as navigating the catalog, creating and updating folders and adding/editing Learning Elements.

You can view/edit all features, folders and Learning Roles this Admin Type can access by clicking the pencil icon next to it.
**Learner Admin Type**
Unlike the previous admin type, the Learner Admin Type is allowed to perform Learning Element Enrollments, Create and Update Teams, Manage Learners and Roles. This Admin Type can Bulk Import Learners and LMS Admins, access the Reports Module and launch Role Activity, Learner Activity, LE Utilization and Question Utilization reports.

You can view/edit all features, folders and Learning Roles this Admin Type can access by clicking the pencil icon next to it.

![LMS Admin Type List](image)

**Report Admin Type**
As implied in its name, the Report Admin Type has exclusive access to all the reporting features only. It can access the Reports Dashboard, view Reports Definitions and Delivery Schedules. This Admin Type can launch any of the Role Activity, Learner Activity, LE Utilization and Question Utilization Reports.

You can view all features, folders and Learning Roles this Admin Type can access by clicking the pencil icon next to it.

![LMS Admin Type List](image)

**Team Admin**
The Team Admin Type is the most powerful LMS Admin Type. It is allowed to access ALL the features the other Admin Types can access and also Delete and Restore Learner’s Attempt Records. This Admin Type can Create/Update and Delete Teams and Configure the Manager, Learner and Reports Module, as well as many others options.

You can view all features, folders and Learning Roles this Admin Type can access by clicking the magnifying glass icon next to it.
New LMS Admin Type
The LMS Admin Types can help you grant access to different managers over a specific branch or department within your organization.

For the following example we will assume that our organization have field offices with sales people, we want sales managers to be able to administrate them.

Create a new Admin Type for a Sales Manager

- Right Click on All Members and select LMS Admin Types from the context menu

- Click Add New LMS Admin Type

- The New LMS Admin Details page is displayed
In the Name Field, enter “Sales Admin”

Enter a Description to help you identify this LMS Admin Type. For this example we will write “Sales Administrator”

Select an icon from the list for this new LMS Admin Type.

Feature Access: Check the boxes next to the LMS Admin Features, Learner Features and/or Report Features this LMS Admin will have access to. For this example, check Enrollment, My
Team and all the Reports Features options. This will allow this LMS Admin Type to access all the Enrollment, My Team and Reports features in the Manager Module. No selections will be made for Learner Features.

- **Learning Element Folder Access:** Select the content folders this LMS Admin Type will have access to. For this example, uncheck “Inherit Team Access” box and check the boxes next to the Sales Training course folder.

- **Learning Role Access:** Select the Learning Roles this LMS Admin Type will have access to. For this example, uncheck “Inherit Team Access” box and check the boxes next to the LMS Learners > Sales Pros.

- **Feature Access:** Check the boxes next to the LMS Admin Features, Learner Features and/or Report Features this LMS Admin will have access to. For this example, check Enrollment, My Team and all the Reports Features options. This will allow this LMS Admin Type to access all the Enrollment, My Team and Reports features in the Manager Module. No selections will be made for Learner Features.
**Learning Element Folder Access:** Select the content folders this LMS Admin Type will have access to. For this example, uncheck “Inherit Team Access” box and check the boxes next to the Sales Training course folder.

**Learning Role Access:** Select the Learning Roles this LMS Admin Type will have access to. For this example, uncheck “Inherit Team Access” box and check the boxes next to the LMS Learners > Sales Pros.

**Feature Access:** Check the boxes next to the LMS Admin Features, Learner Features and/or Report Features this LMS Admin will have access to. For this example, check Enrollment, My Team and all the Reports Features options. This will allow this LMS Admin Type to access all the Enrollment, My Team and Reports features in the Manager Module. No selections will be made for Learner Features.
- **Learning Element Folder Access:** Select the content folders this LMS Admin Type will have access to. For this example, uncheck “Inherit Team Access” box and check the boxes next to the Sales Training course folder.

- **Learning Role Access:** Select the Learning Roles this LMS Admin Type will have access to. For this example, uncheck “Inherit Team Access” box and check the boxes next to the LMS Learners > Sales Pros.

- Check the **Enable** box to make the new “Sales Admin” Type available to this Team.
Adding Learners to Teams

The Team’s Learners section offers many features to manage and associate Learners to the current Team.

- **Learner Management**: Allows LMS Admins to manage individual Learners or even Add New Users to the LMS and associate them to a particular Team.
- **Bulk Learner Import**: This Feature allows Administrators to quickly Import a list of new users while making them members of the current Team.
- **Bulk Learner Assignment**: In case Learners are already registered in the LMS, the Bulk Learner Assignment feature will make those Learners member of a chosen Team.

💡 Please refer to the Accord LMS Admin Guide for more detailed information on the Learners options.

For this example, we will import learners by using **Bulk Learner Import**.

- Right click on the **Boston** Team.
- Select **Bulk Learner Import**.
- Browse for the **Learner List** to upload.

For this example, we will import learners by using **Bulk Learner Import**.

- Right click on the **Boston** Team.
- Select **Bulk Learner Import**.

- Browse for the **Learner List** to upload.

- The Learner Management screen displays.
- Click on **Modify Learner Status**.
For this example, we will designate “Patrick” as a Team Administrator.

Click Update.

Since Craig is our Sales Manager, we will assign him the Sales Admin role.

Click on Modify Learner Status icon that belongs to user Craig.

In the Team Member Status screen, check the button next to Sales Admin.
Enroll Learners into Learning Roles

Now that we have the Team, the Administrators and the Learners assigned to our Boston Team, we will enroll some Learners into Learning Roles.

To do this:

- Right click on Learners.
- Select Learner Management.

- Choose user “Simon” and click on the Manage Roles icon.

- We will assign “Simon” the Sales Pros role.
- Select the Role from the **Security Roles** list.
- Click **Add Role to User**.

By doing this, the next time Simon logs into the Accord LMS he will be able to see the Sales Training folder and Learning Content in his My Plan.