GUIDANCE DOCUMENT: How to manage learners as an administrator.

To access online learning, you will login via the Rugby Xplorer platform. If you do not already have a Rugby Xplorer account, **watch this video** to see how to sign up: RX – How to sign up.

If you have not accessed the LINE*BREAK* learning management system before, follow these steps: www.nzrugby.co.nz/assets/1.0-Learner-GD_How-to-log-in.pdf

If you have any questions, problems, feedback or if you feel you should have admin access and you do not, please contact us on educationhelp@nzrugby.co.nz.

Steps covered in this GD include:

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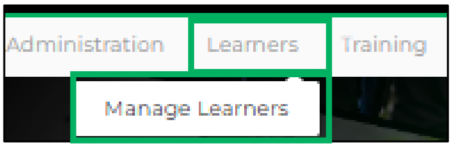
Learner menu – manage learners

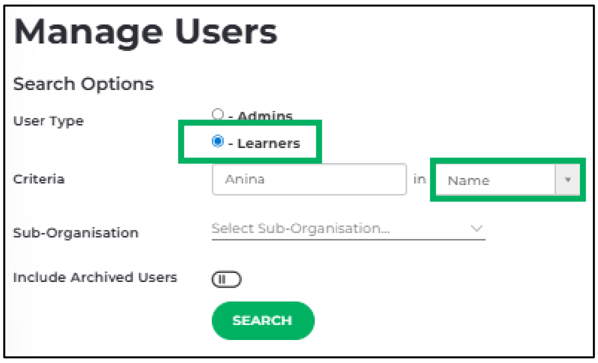
Make sure you have **switched to you administrator access**. To access your admin account, follow these steps: [How to switch your accounts.]

Under the "**Learners**" menu, you can manage your learners.

1. Click "**Learners**", followed by "**Manage Learners**".



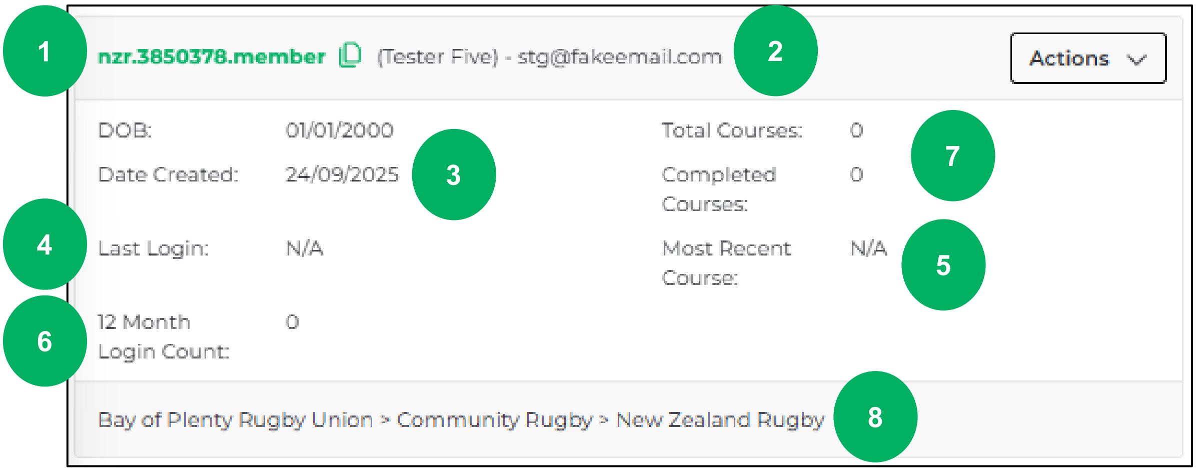
To search for a learner



2. Select ***"Learners"*** from the User Type *(Only NZR staff with department and organisational level admins can search for "admins").*
3. Within the search criteria, type the name of the learner you wish to locate and select the type of criteria by selecting from the drop-down box.
4. Click "**Search**".

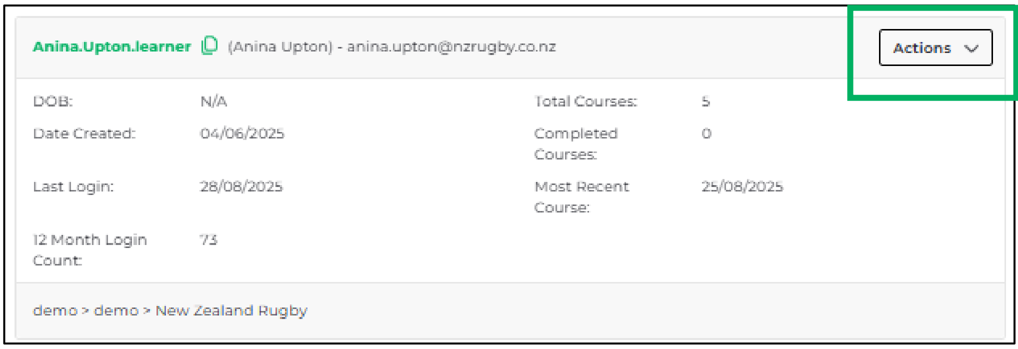
Note: Click on the 'Include Archived Users' toggle if you cannot locate the Learner in case their account has been archived. Learners are archived if they have been turned inactive in the system.

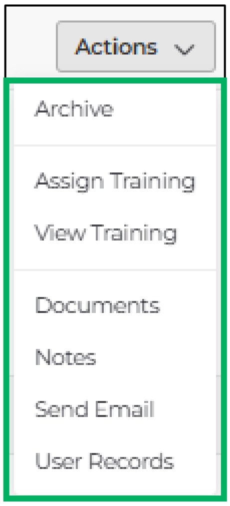
When your search has been run, there is a lot of learner information you can view here:



1. Username (in green).
2. Name and email of the learner.
3. Date their account was created.
4. Date the learner last logged in.
5. Date most recent course was accessed.
6. 12 Month login: This outlines the number of times the learner has logged into the platform in the last 12 months.
7. Completed courses: This outlines the number of courses the learner has completed.
8. This shows the learner's SUB ORG > DEPARTMENT > New Zealand Rugby (ORGANISATION).

In addition to the above snapshot, as an LMS administrator you will have access to perform the following:

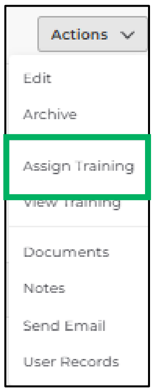




Depending on access you have been provided with, administrations can:

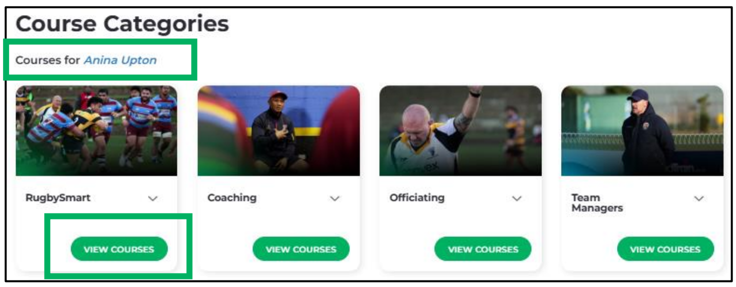
1. **Assign training:** This allows you to enrol learners into training IF they meet the pre-requisites.
2. **View training:** This allows you to view at a deeper level the training results and progress of the learner.
3. **Documents:** This allows you to upload additional documentation relevant for the learner's account.
4. **Notes:** Add notes to the learner's record.
5. **Send Email:** Contact the learner via the LINE*BREAK* system.

To enrol a learner (assign training)

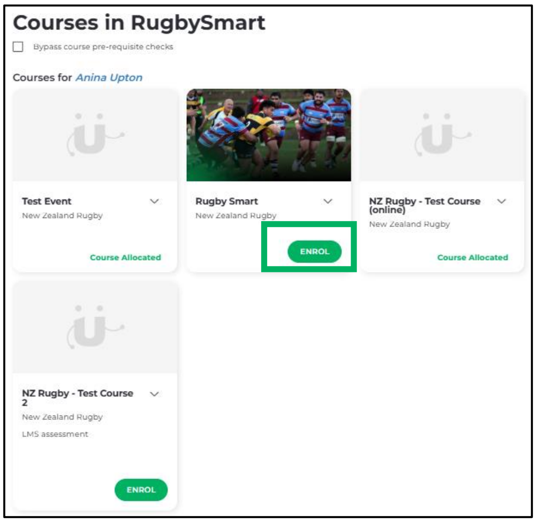


Once you find the learner you wish to enrol in the search results at the bottom of the screen:

1. Locate the learner's information box.
2. Click on the "**Assign training**" under the "**Actions**" dropdown.
3. All course categories will show for that learner. Click into the Course Category (that holds the course you want to enrol the learner into) by clicking on **"View Courses".** If you are unsure in which category a course lives, click on the dropdown arrow below the image for a list.



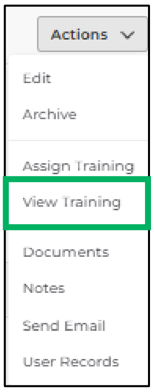
4. All courses available for enrolment will show. Locate the one you would like to enrol your learner into and click on "**Enrol**".



5. Once processed, you will return to the "manage users" screen.

To check a learner's training record

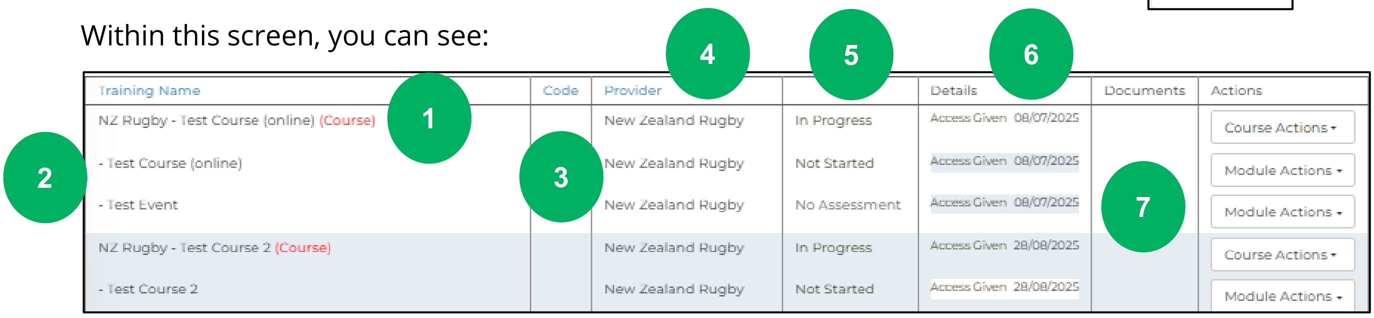
This allows you to view the progress status of a learner's training.



This ONLY applies to their progress of courses in the LMS as SalesForce is still the single source of truth for all member awards and records.

1. Locate the learner.
2. Click on the "**View Training**" icon.

Within this screen, you can see:



Training Name	Code	Provider		Details	Documents	Actions
NZ Rugby - Test Course (online) (Course)		New Zealand Rugby	In Progress	Access Given 08/07/2025		Course Actions
- Test Course (online)		New Zealand Rugby	Not Started	Access Given 08/07/2025		Module Actions
- Test Event		New Zealand Rugby	No Assessment	Access Given 08/07/2025		Module Actions
NZ Rugby - Test Course 2 (Course)		New Zealand Rugby	In Progress	Access Given 28/08/2025		Course Actions
- Test Course 2		New Zealand Rugby	Not Started	Access Given 28/08/2025		Module Actions

1. **Training Name:** This is the course name the learner has enrolled into.
2. **Module Name(s):** These are the modules that make up the course. *The "parts" of the course are the ones with the dash (-) bullets.*
3. **Code:** N/A please ignore.
4. **Provider:** Supplier that the training is under in the back end of the system.
5. **Status:** This section outlines whether the course/module is In Progress (or No Assessment for event modules), Not Yet Started, or Complete.
6. **Details:** This section outlines the date on which the course was allocated, completed, and marked as competent.
7. **Documents:** Certificates (if applicable) can be accessed here. This does not apply to documents YOU add to a learner's account (see next section) but applies to certificates generated by the LMS.

While viewing the learners training history:

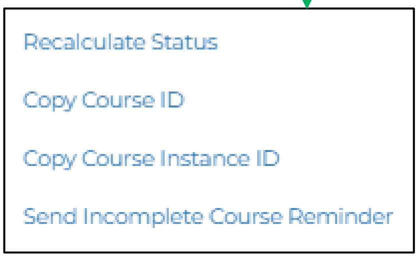
View Training for *Anina Upton*

The amount of information available below depends upon the access that a learner has given to you.

Click on the header to sort by that column.

Training Name	Code	Provider		Details	Documents	Actions
Concussion in Community Rugby (Course)		New Zealand Rugby	In Progress	Access Given 22/09/2025		Course Actions ▾
- Recognise and Remove in Community Rugby		New Zealand Rugby	Not Started	Access Given 22/09/2025		
- Recover and Return in Community Rugby		New Zealand Rugby	Not Started	Access Given 22/09/2025		
NZ Rugby - Test Course (online) (Course)		New Zealand Rugby	In Progress	Access Given 08/07/2025		Course Actions ▾
- Test Course (online)		New Zealand Rugby	Not Started	Access Given 08/07/2025		
- Test Event		New Zealand Rugby	Complete	Access Given 08/07/2025		
NZ Rugby - Test Course 2 (Course)		New Zealand Rugby	In Progress	Access Given 28/08/2025		Course Actions ▾
- Test Course 2		New Zealand Rugby	Not Started	Access Given 28/08/2025		

If you select "**Course Actions**", you can:



- **Recalculate Status** - You can click this to immediately update a learner's record (i.e. if they had finished a course 10 seconds ago, it would show). It's like a "refresh" button but not really needed.
- **Send Incomplete Course Reminder** – You click this to send a reminder to the learner to complete the course. You need to confirm this, and it is a system generated email.

The other 2 actions are for organisation admins only, please ignore.

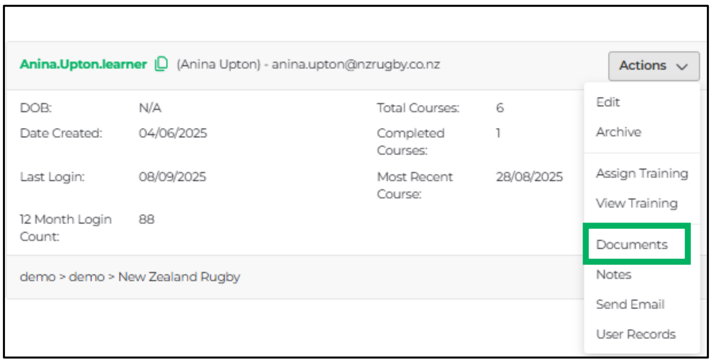
To upload a document to a learner's account

Adding documents to a learner's account can be a great place to store information not elsewhere stored.

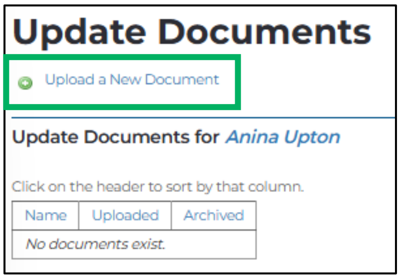
There is currently no instance where 'uploading a document to a learner account' is required for NZR. These instructions are for future use only, but note:

- Documents you add here, are NOT available in SalesForce, RX or other systems, they are for your reference only.
- These documents are not visible to a learner, but other administrators can see them.
- Documents can't be deleted once added but can be archived.

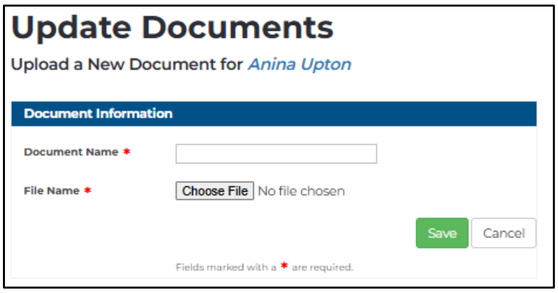
1. Locate the learner.
2. Click on the "**Documents**" under "**Actions**".



3. Click on **"Upload a New Document**".



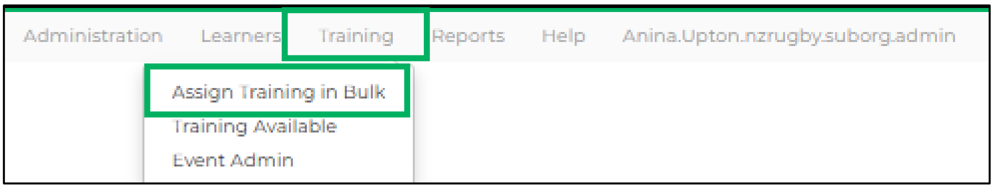
4. Complete the document upload information:
   a. Give the document a name.
   b. Upload a document using the "**Choose File**" button (locate the file from your computer files).
   c. Click "**Save**".



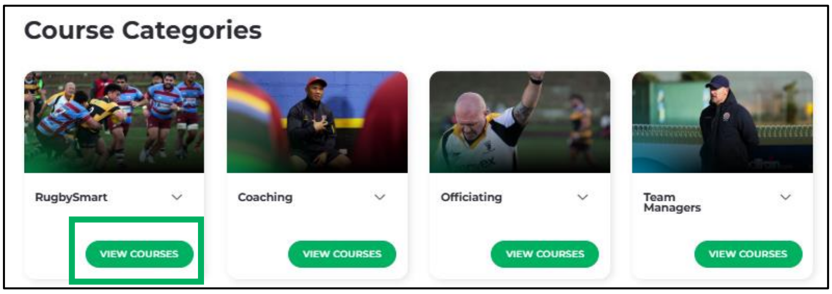
To bulk enrol more than 1 (1+) learners into the same course

From your administrator home page:

1. Click on **"Training"** in top bar menu, and then select "**Assign Training in Bulk**".



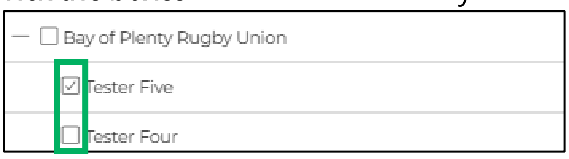
2. All course categories will show. Click into the Course Category by clicking on "**View Courses**".



3. All courses available for enrolment will show. Locate the one, you would like to enrol your learners into and click on "**Assign**".

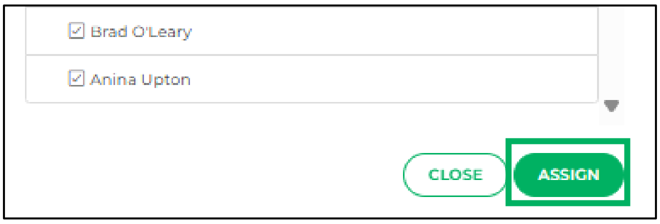
4. Your sub-organisation/PU heading will show with a plus icon.
   a. Click on **the plus icon to expand** the list and see a list of all your learners.

   b. **Tick the boxes** next to the learners you wish to enrol.



Note: If you tick "**Send notification email**", the system will send a "you have been enrolled email" to the learners. If you tick **"Include previously completed"**, even if the learner has done the course before, they will be re-enrolled.

5. Once you have selected all your learners, click on the **"Assign"** button at the bottom right-hand corner of the pop up ***(You may need to scroll down to see this).***



<u>Note:</u> Bulk assign only gets **processed overnight**, so learners will be enrolled the following day!! **Please do not assign training twice.**

You can on the **day after** you do the bulk enrolment, run a "**Bulk Course Distribution" Report**, to see if any members were NOT enrolled as they did not meet the pre-requisites.