



Local Administrator Website Guide



VIRTUS[®]
Excellence
Builds
Trust

Log in to your VIRTUS account at www.virtus.org
to review the functionalities of the VIRTUS Platform.

(To inquire about your specific access, communicate
with your Diocesan Safe Environment Assistant.)

Frequently Asked Questions:

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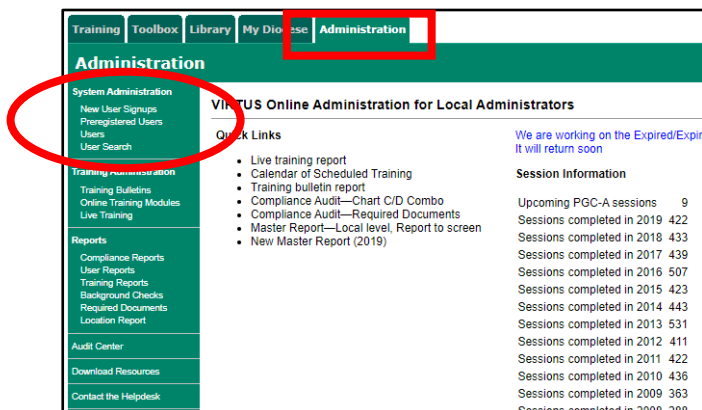
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How do I view employees and volunteers who have registrations within VIRTUS Online, and edit records within my location(s)?

1. Select the "Administration" tab from the tabs at the top of the page:



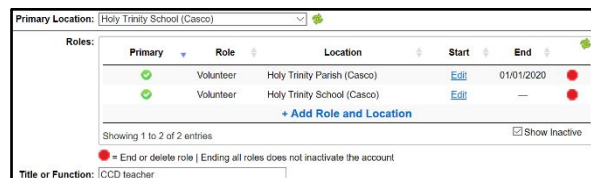
- a. New User Signups – indicates that the training session has past that the person registered for. Person may have registered but never attended the session or completed the online training. Please check with the Safe Environment Assistant for direction.
- b. Preregistered Users – indicates that the user registered for an upcoming session (the coordinators will be notified via email of the registration)
- c. Users – indicates the list of users within the coordinators location(s)
- d. User Search – search for users within the entire diocese

2. The employees and volunteers for your affiliated location(s) will be listed in alphabetical order by last name. You can also search in the Search box for individual users, then select "User Search".



- a. If a person is missing, double check other possibilities of name spellings. Additionally, the person may not have registered online. They may have attended as a walk in to a classroom session. Please contact Safe Environment Assistant for help.
- b. To add a New User that does not have the ability to register online, please click on 'Add New User' within 'Users'.
- c. If the user is listed within your location(s), you will have the ability to edit information within the General Tab, such as User ID, Name, Email, Location and Role, and then select Save or Save and Review. If the user does not have your location listed as a primary or additional location you will need to contact Safe Environment Assistant to add.
- d. To make needed updates to a record within your location(s), update the needed fields, and then click 'Save' or 'Save and Review'.

- e. To **update** Location and Role, click on **Add Role and Location** and select Role, Location and Start Date (if unknown, leave blank or put the date you enter the update) and **Save**. To **inactivate** a Role/Location, click on Add Role and Location, under Role select Inactive Personnel, under Location select Inactive



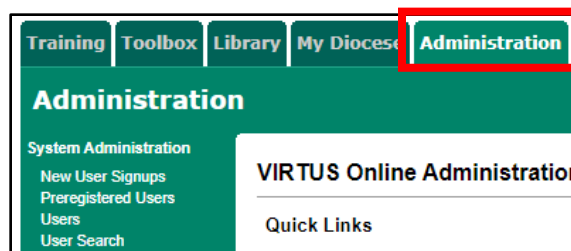
Personnel (Green Bay) click on SAVE. Use the red **stop sign** to inactivate or delete if it is an incorrect selection. The green check signifies the primary location and role.

- f. The Local Administrator will not be able to make/save any changes if the person's Primary Location or Additional Location(s) do not match the Local Administrator's location. Please contact the Diocesan Safe Environment Assistant for help.

How do I assist with recovering an individual's username or password as a Local Administrator?

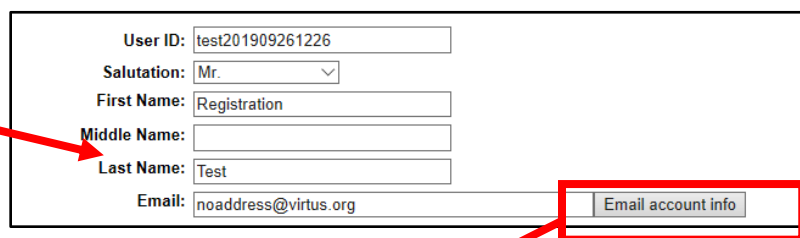
1. The Local Administrator may assist with recovering the username/password only for accounts that already exist

First, search the database to find the online account by reviewing the instructions listed within this document under the section entitled, *"How do I search the entire organization to view if a particular individual has an online registration, make changes to their account and/or affiliate them with my location?"*



2. Once the account is located, click on the last name to pull up the profile information
 - a. If the Local Administrator **shares the same "Primary" or "Additional"** location as the individual, then the administrator can ask the system to send the individual his/her user ID and password

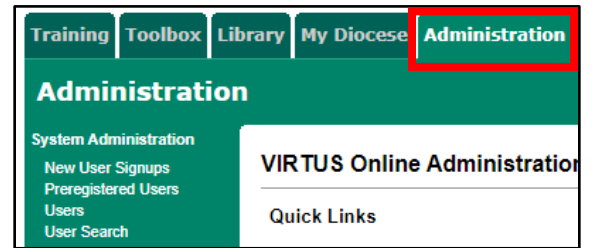
- i. First, the Local Administrator should check that the email listed within the account is accurate
- ii. If the email is not accurate, then the administrator should update the email address and select "Save and Review" at the bottom of the page
- iii. Once the email is updated and correct, select "Email account info," and ask the individual to retrieve the message from their email account and proceed accordingly.



- b. If the Local Administrator does not share the same "Primary" or "Additional" location as the individual, the Local Administrator can only inform the individual of his/her User ID and request that the individual use the password recovery function on the homepage of www.virtus.org.

How do I review an account to see if training have been completed?

1. In order to review an account's main profile page, the Local Administrator must first search for the user and click on the person's name to open up the profile. If the Local Administrator is having difficulties locating an individual who has an account, please view the section in this document entitled, *"How do I view my own location's employees and volunteers who have online registrations within VIRTUS Online?"*



2. To view a training information, select the Training Tab. A user can be added to an upcoming session and/or assign online training from this tab.
3. Click on 'Add the user to an upcoming session' to add the user to training.
4. To change the start date of when a user is to begin reading bulletins, please click on 'Change the bulletin start date for this user'.

A screenshot of the VIRTUS Online Training tab. The top navigation bar includes 'General', 'Contact Info', and 'Training', with 'Training' highlighted in red. Below this, the 'Approval Date' is shown as '10/31/2017'. The 'LIVE TRAINING' section contains a table with columns 'Title', 'Date', 'Training Location', and 'Status'. Below the table is a link 'Add this user to an upcoming session'. The 'TRAINING BULLETINS' section contains a table with columns 'Type', 'Featured', 'Read', and 'Missed'. Below the table are two links: 'Manually record training bulletins for this user' and 'Change the bulletin start dates for this user'. The 'ONLINE TRAINING MODULES' section contains a table with columns 'Module', 'Assigned', 'Started', and 'Completed'. Below the table is a link 'Assign training to this user'. Red arrows point from the text in the list to the 'Add this user to an upcoming session' and 'Change the bulletin start dates for this user' links.

How to view scheduled sessions and print attendance sheets?

View a List of Upcoming Training Sessions

Select the “Administrator tab” and then select either “Calendar of Scheduled Training” in the middle of the screen or “Live Training” under “Training Administration” in the left-hand green margin.

VIRTUS Online Administration for Local Administrators

Quick Links

- Live training report
- Calendar of Scheduled Training
- Training bulletin report

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If “Calendar of Scheduled Training” is selected, this screen is displayed. Note the print icon.

Schedule Training				
Current Training Scheduled:				
Protecting God's Children for Adults				
Date/Time	Location	Facilitator	Max size	
04/21/2020 6:00 PM	Diocese of Green Bay - Chancery Office, St Francis Xavier Rm (Green Bay/Allouez)	Debra Knaus Daniel Wagnitz	50	
05/19/2020 6:00 PM	Diocese of Green Bay - Chancery Office, St Francis Xavier Rm (Green Bay/Allouez)	Debra Knaus Daniel Wagnitz	50	
06/16/2020 6:00 PM	Diocese of Green Bay - Chancery Office, St Francis Xavier Rm (Green Bay/Allouez)	Debra Knaus Daniel Wagnitz	50	
08/18/2020 6:00 PM	Diocese of Green Bay - Chancery Office, St Francis Xavier Rm (Green Bay/Allouez)	Debra Knaus Daniel Wagnitz	50	
09/15/2020 6:00 PM	Diocese of Green Bay - Chancery Office, St Francis Xavier Rm (Green Bay/Allouez)	Debra Knaus Daniel Wagnitz	50	

Print Attendance Sheets for Live Training Sessions

Select the “Administrator tab” and select “Live Training” under “Training Administration” on the left green bar. Then select “Manage Registrations.”

Select A Session:

Upcoming sessions | **Past Sessions:** **2020** **2019** **2018** **2017** **2016** **2015** **2014**

09/30/2014 6:30 PM - (Holy Trinity School - Casco) - Protecting God's Children for Adults ▾


Continue


Choose a session from the dropdown box and select “Continue.”

- **Show Pre-registration/Attendance count by session**

Note: This report shows those individuals who PRE-registered and/or attended this training session.

Select the 'Create sign-in sheet' or 'Export sign-in sheet' to print a sign in sheet.





Create sign-in sheet Export sign-in sheet

Email sign-in sheet to:

- Please Select -

Or enter an email address below:

Email Sign-in Sheet

How do I create a Master Report within VIRTUS Online?

Generate the Master Report 2020 within the Administration Tab, Quick Links:

Quick Links

- Live training report
- Calendar of Scheduled Training
- Training bulletin report
- Master Report – Local level Report to screen
- **New Master Report (2020)**

1. The report that is essential for auditing locations and combining all the most important details into one easy to read report is the New Master Report. This report allows the ability to filter user requirements revealing only the most recent dates of completion.

This report offers you the flexibility of combining or listing requirements separately.

In addition to filtering locations and/or roles, the Master Report can filter users who are currently active, or active during a specific period of time, or reveal all users active and inactive for a location. This is very helpful as an end of year report for locations.

2. Select the needed filters to build your report, and you will have access to your designated location(s) with the ability to select.

3. Select the needed User Fields to build your report, such as Last name, First name, Email, Primary Location and Primary Role.

4. Select the training selections, and you can check 'Combine all selected training types into one column – You must select the items below to combine'.

5. Check the selections of active or all users and Run Report to Screen that allows the ability to drill into a user's record. Or, Export Report to CSV and then save to Excel.

Master Report

Filters

Location:

- All Locations --
- All Saints Catholic School Inc (Antigo)
- All Saints Parish (Denmark)**
- All Saints School (Denmark)
- Allouez Catholic Cemetery (Green Bay)
- Annunciation/Blessed Virgin Mary Pa
- Archbishop Cousins Center DO NOT

Role:

- All Roles --
- * Candidate for ordination
- * Deacon
- * Educator
- * Employee (Diocesan/Eparchial)
- * Employee (Parish/Parochial)
- Facilitator

Profile:

- All Profiles --
- Administrator
- Catechetical Administrators
- Deacon
- Deacon Aspirant
- Deacon Candidate
- Default

Continuing Training:

- All Training Statuses --
- Not Required
- Required: Bulletins
- Required: Printed
- Childrens Program Only
- Completed: Access
- Completed: No Access

User Fields

- ☒ Last
- ☒ First
- ☐ Middle
- ☐ Nickname
- ☐ Salutation
- ☐ Login ID
- ☒ Email
- ☐ Account Status
- ☒ Primary Location
- ☐ Primary Location ID
- ☐ All Locations (select to find users in secondary sites)
- ☒ Roles in primary location only (select to limit roles to only those in the user's primary location)

Training

☒ Combine all selected training types into one column - You must select the items below to combine

Live

- ☒ Protecting God's Children for Adults
- ☐ Protecting God's Children for Facilitators
- ☐ Protecting God's Children for Parents
- ☐ Sex Abuse Prevention

Online

- ☐ Keeping the Promise Alive
- ☐ Keeping the Promise Alive 3.0
- ☐ Protecting God's Children - Part I: Awareness Prequestionnaire
- ☐ Protecting God's Children - Part II: Communication and Timely Response Prequestionnaire
- ☐ Protecting God's Children® Online Awareness Session 2.0
- ☒ Protecting God's Children® Online Awareness Session 3.0 (Spanish)
- ☒ Protecting God's Children® Online Awareness Session 3.0

☒ Show only users who are currently active

☐ Show users who were active from: 07/01/2019 to: 06/30/2020

☐ Show all users*

Run Report to Screen **Export Report to CSV**

If an individual took the VIRTUS training in another Diocese, how do we ensure the training appears in the Database?

1. If an individual tells you that they have completed the training in another diocese, as long as they received credit for that training and have an online account, the VIRTUS Help Desk can transfer that user into the Diocese so that the training they completed appears in the VIRTUS database. When transfers occur, the VIRTUS Help Desk will contact the Diocesan Safe Environment Assistant, and ask them to review the account to ensure that it is properly situated.

Resources	Reporting Child Abuse	Contact Information	Help / FAQs
<p>For help with registration, passwords, User IDs, background checks and website questions, please click here to first review our Online Help / FAQs section as your question may already be answered.</p> <p>After reviewing the Online Help / FAQs section, for additional questions regarding online assistance, message us using our Online Helpdesk Email Form.</p> <p>VIRTUS toll-free phone number for online assistance, questions and ordering: 1-888-847-8870</p>			