



American
Heart
Association.

ATLAS USER MANUAL

Training Site Management

A navigation guide for the Atlas application

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1 Introduction

The American Heart Association (AHA) is dedicated to saving more lives through research, training, and education designed and owned by the AHA. CPRverify is a web-based application designed specifically to support AHA training internationally. The Instructor Network serves the same purpose within the United States.

These applications make it possible for Training Centers and instructors to monitor and track their AHA training, including publishing classes for students to sign up for, managing student rosters, and many other functions. They also provide the ability for managing Training Center alignments and permission.

Currently, the 2 applications are separate to cater to different geographies, either within USA or outside of USA. Atlas is a reimaged solution that caters to the global market. This digital platform is available to the AHA training network, including Training Centers, sites, instructors, and students who are located anywhere in the world, working together to make a difference and save more lives.

2 Purpose

The purpose of Atlas is to provide a single application for all audiences across the world. This document has been created to help ensure a smooth onboarding journey, focusing on the different capabilities within the Atlas application, and will serve as an instructional guide for users to successfully navigate and perform various application functions within the system.

3 Intended Audience

The intended audience includes Training Center Coordinators (TCCs), Training Center Administrators (TCAs), Training Site Coordinators (TSCs), and Training Site Administrators (TSAs).

4 Abbreviations and Descriptions

Abbreviation	Description
AHA	American Heart Association
TCA	Training Center Administrator
TCC	Training Center Coordinator
TS	Training Site
TSA	Training Site Administrator
TSC	Training Site Coordinator

5 Training Site Management

5.1 Training Sites

Training Sites must be always associated with, and operating under, a Training Center. A Training Site cannot be a stand-alone entity.

Training sites may only align with 1 Training Center. TSC/TSA roles are responsible for the management of Training Sites.

5.1.1 Training Sites Page

The **Training Site** page displays a list of Training Sites under the governing Training Center.

- Once logged in as a **TCA/TCC**, users may select the **Training Site** link from the **Training Center** drop-down menu to be navigated to the **Training Site** page (Figure 1).

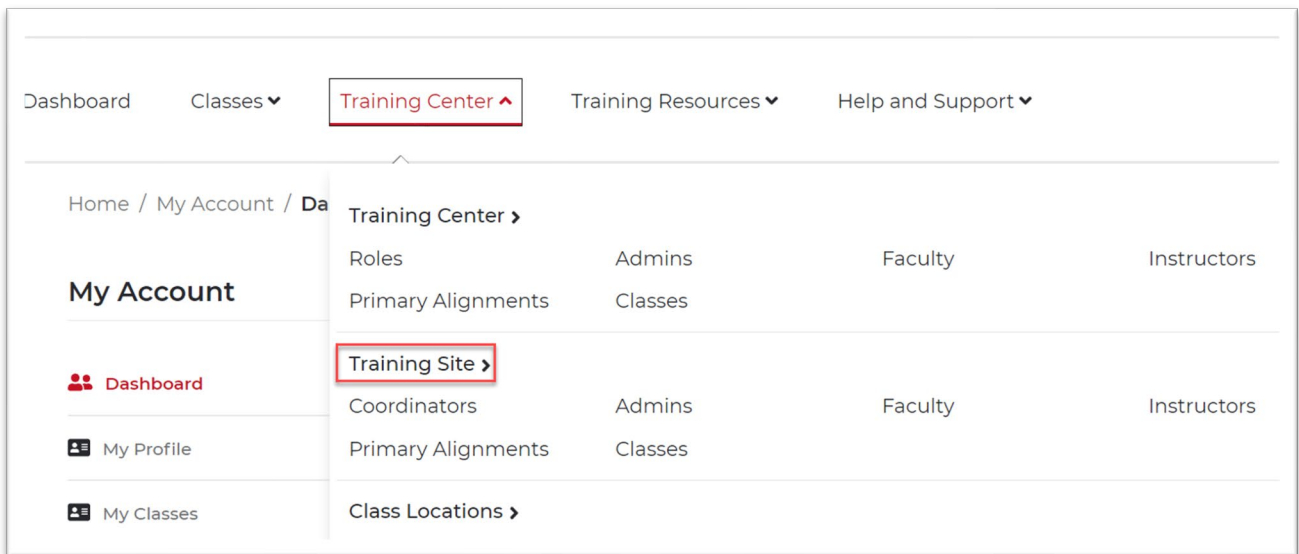


Figure 1. Training Site link from the Training Center drop-down menu.

- The Training Sites page displays a list of all the Training Sites associated with the governing Training Center (Figure 2). The list may be filtered, searched, sorted, and exported. The actions to be taken from this page include the following:
 - View Upload History:** This list contains a historical record of the Training Center's uploads of Training Sites and the results of each upload.
 - Add Training Site:** This action allows the user to add a new Training Site.
 - Search:** Search for Training Site using a name or ID.
 - Status:** Filter the Training Site list by its status (All, Active, or Inactive).
 - Territory:** Filter the Training Site list by applicable territories (if available).
 - Country:** Filter the Training Site list by applicable countries (if available).
 - Export:** Export a list of all associated Training Sites in a .CSV file format.

- **Sort by:** Filter the Training Site list by Name or ID, in ascending or descending order.
- **Actions:** These actions are available on an individual Training Site record.

Home / Training Center / Training Site

★ Training Sites [View Upload History](#) | [Add Training Site](#) >

Use this tool to find and administer any Training Site recognized by this platform. Keep in mind that each Training Site is controlled by a particular Training Center within this platform.

Search: Status: Territory:

Country:

Export > Sort by: ↓↑

ID	Name	Approved Disciplines	Phone	Actions
TS81986	Test TS-1	ACLS, PALS, BLS	9789125682	...
TS61556	Test TS-2	ACLS, PALS, BLS	97891218323	...
TS64000	Test-UAT-TS123	ACLS, PALS, BLS	789976232	...
TS28234	Test123-UAT	ACLS, PALS, BLS	1234567667	...

Figure 2. Training Sites page.

5.1.2 Add Training Site

A TCC/TCA may an **Add Training Site** under an existing Training Center by following these steps:

- To create a new Training Site, users may select the **Add Training Site** link from the **Training Sites** page (Figure 3).

Home / Training Center / Training Site

★ Training Sites [View Upload History](#) | **Add Training Site** >

Use this tool to find and administer any Training Site recognized by this platform. Keep in mind that each Training Site is controlled by a particular Training Center within this platform.

Figure 3. Add Training Site link selected from Training Sites page.

- Users will be navigated to the **Add Training Site** page (Figure 4).

The screenshot shows the 'Add Training Site' page for the organization 'UAT TC ORG'. The breadcrumb trail is 'Home / Training Center / Training Site / Add Training Site'. The page title is 'Add Training Site'. There are two tabs: 'Create Training Site' (selected) and 'Import Training Site'. The form contains the following fields:

- Training Site Name* (text input: Enter Training Site)
- Office Phone* (text input: 000 000 0000 with a country code dropdown)
- Upload Image (file upload area with 'Browse' button, note: Maximum file upload size is 1 MB, Format in .jpg, .png)
- Street Address 1* (text input: Enter Address)
- Country* (dropdown: Select Country)
- State* (dropdown: Select State)
- Postal / Zip Code* (text input: Enter Zip Code)
- Website (text input: Enter Website)
- Disciplines* (dropdown: Select Disciplines)
- Street Address 2 (text input: Enter Address)
- Territory* (dropdown: Select Territory)
- City* (text input: Enter City)

At the bottom, there are 'Cancel' and 'Create' buttons.

Figure 4. Add Training Site page with Create Training Site option selected.

- To begin, users may select a Training Center from the **Organization** drop-down menu (Figure 5).
 - This applies only if the user is a TCC/TCA for multiple organizations.

The screenshot shows the 'Add Training Site' page with the 'Organization' drop-down menu open. The breadcrumb trail is 'Home / Training Center / Training Site / Add Training Site'. The navigation bar includes 'Dashboard', 'Classes', 'Training Center', 'Training Resources', and 'Help and Support'. The 'Organization' dropdown menu is open, showing the following options:

- UAT TC ORG (highlighted)
- UAT TC 002
- UAT TC ORG
- Test TS-2

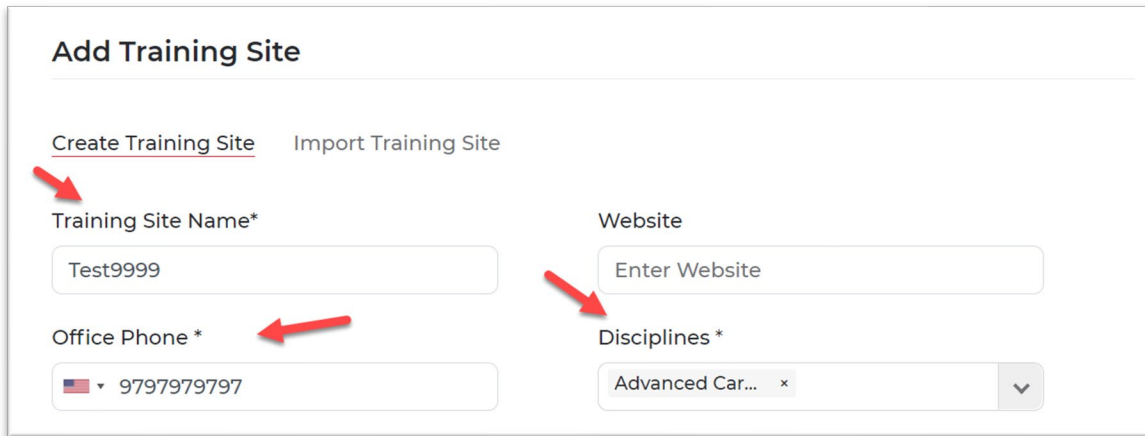
A red arrow points to the dropdown menu.

Figure 5. Organization drop-down menu from the Add Training Site page.

- Next, users may decide to add a new Training Site by using one of the following methods:
 - **Create Training Site tab:** Manually type all information for the new Training Site into the fields shown (described here).
 - **Import Training Site tab:** Using the formatted CSV file, submit the details for a new Training Site (described in the **Import a Training Site** subsection below).

Create Training Site (Manual Entry)

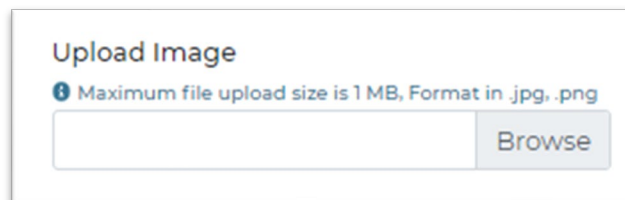
- Users should begin by completing the fields shown. Fields with an asterisk (*) indicate that the field is mandatory and must be completed (Figure 6).



The screenshot shows a web form titled "Add Training Site". At the top, there are two tabs: "Create Training Site" (which is selected and underlined) and "Import Training Site". Below the tabs, there are four input fields arranged in a 2x2 grid. The top-left field is "Training Site Name*" with the value "Test9999". The top-right field is "Website" with the placeholder text "Enter Website". The bottom-left field is "Office Phone*" with a dropdown menu showing a US flag and the value "9797979797". The bottom-right field is "Disciplines*" with a dropdown menu showing "Advanced Car..." and a close button (x). Red arrows point to each of these four fields.

Figure 6. Create Training Site fields, including Training Site Name, Website, Office Phone, and Disciplines.

- To upload a Training Site image or logo from the **Upload Image** section, users should select the **Browse** button (Figure 7).



The screenshot shows a section titled "Upload Image". Below the title, there is a blue information icon followed by the text "Maximum file upload size is 1 MB, Format in .jpg, .png". Below this text is a text input field and a "Browse" button.

Figure 7. Training Site Upload Image field.

- Selecting **Browse** opens a dialog box that allows users to browse local directories for an image to upload (Figure 8).

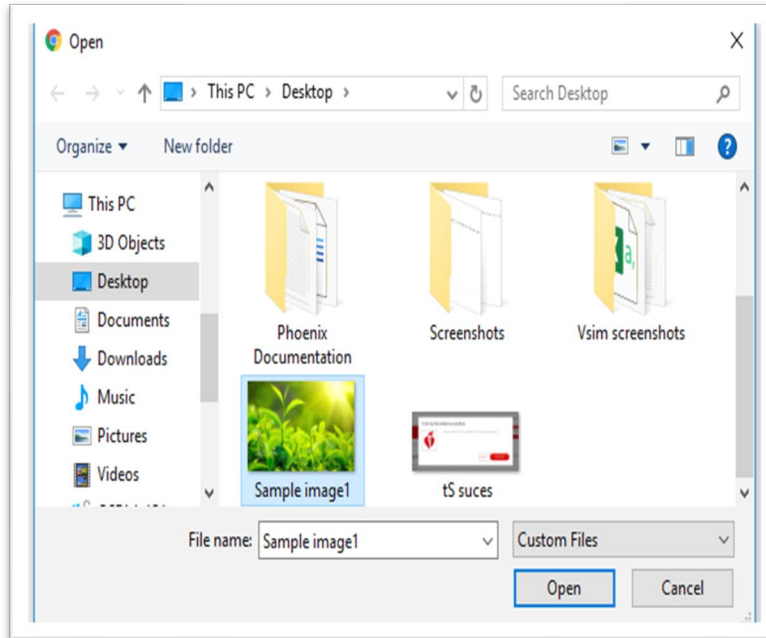


Figure 8. Image Upload.

- Users should continue entering data into the page fields. Those with an asterisk (*) indicate that the field is mandatory and must be completed (Figure 9).

Figure 9. Create Training Site fields, including Street Address lines 1 and 2, Country, Territory, State, City, and Postal/Zip Code.

Note: The field **Street Address 1** should have no more than 100 characters, and **State** and **Postal/Zip Code** are mandatory fields only if the country indicated is the United States.

- Once users have completed all the mandatory fields, they may select **Create** to complete the action.
- When the **Add a Training Site** action has been successfully created, a pop-up message appears that says, **“Training Site added successfully”** (Figure 10).

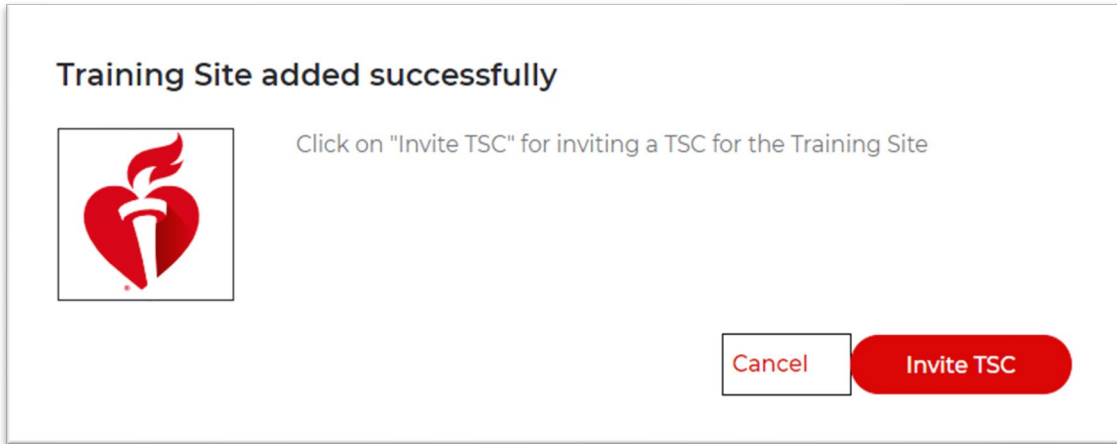


Figure 10. Training site addition confirmation pop-up message.

Note: The confirmation pop-up message also includes an **Invite TSC** button, which is the next recommended step after a new Training Site is added to the system. To proceed, users may select the button. To ignore the recommended action and return to the **Training Sites** page, users may select **Cancel** instead.

Import Training Site (Automatic Entry)

New Training Sites may be created in the system by using a **CSV** file import. This function is mainly used for the bulk creation of Training Sites, because adding multiple sites individually would be a time-consuming task.

- To create new Training Sites by using the upload feature, users should navigate to the **Add Training Site** page and select the **Import Training Sites** tab (Figure 11).

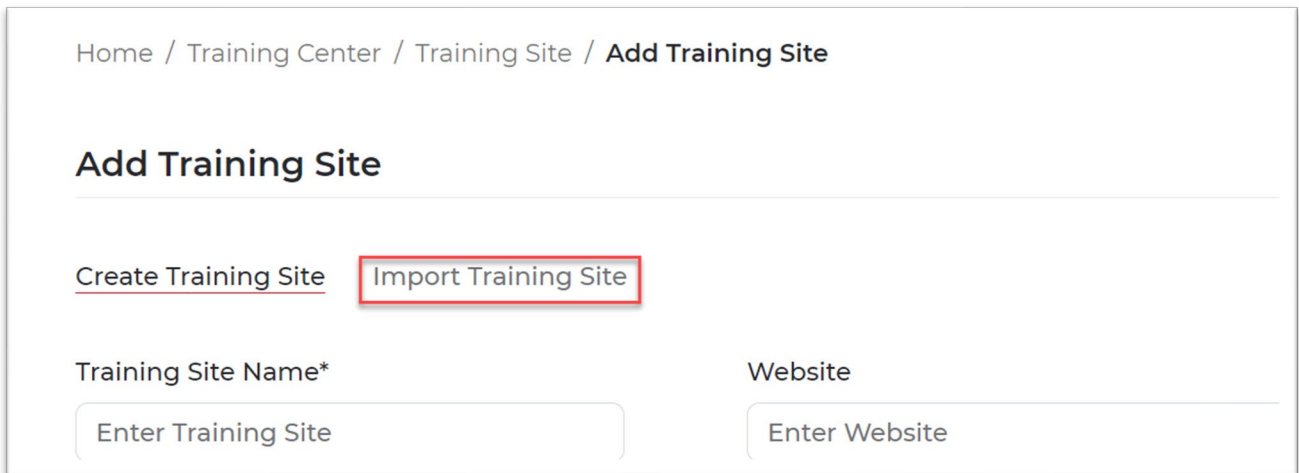


Figure 11. Add Training Site page with Import Training Site option selected.

- To begin, users should select the instruction text in line 1. The system will automatically download the referenced zip file, which includes an **Instruction PDF** and the **Formatted CSV** file that will be needed to complete this action (Figure 12).

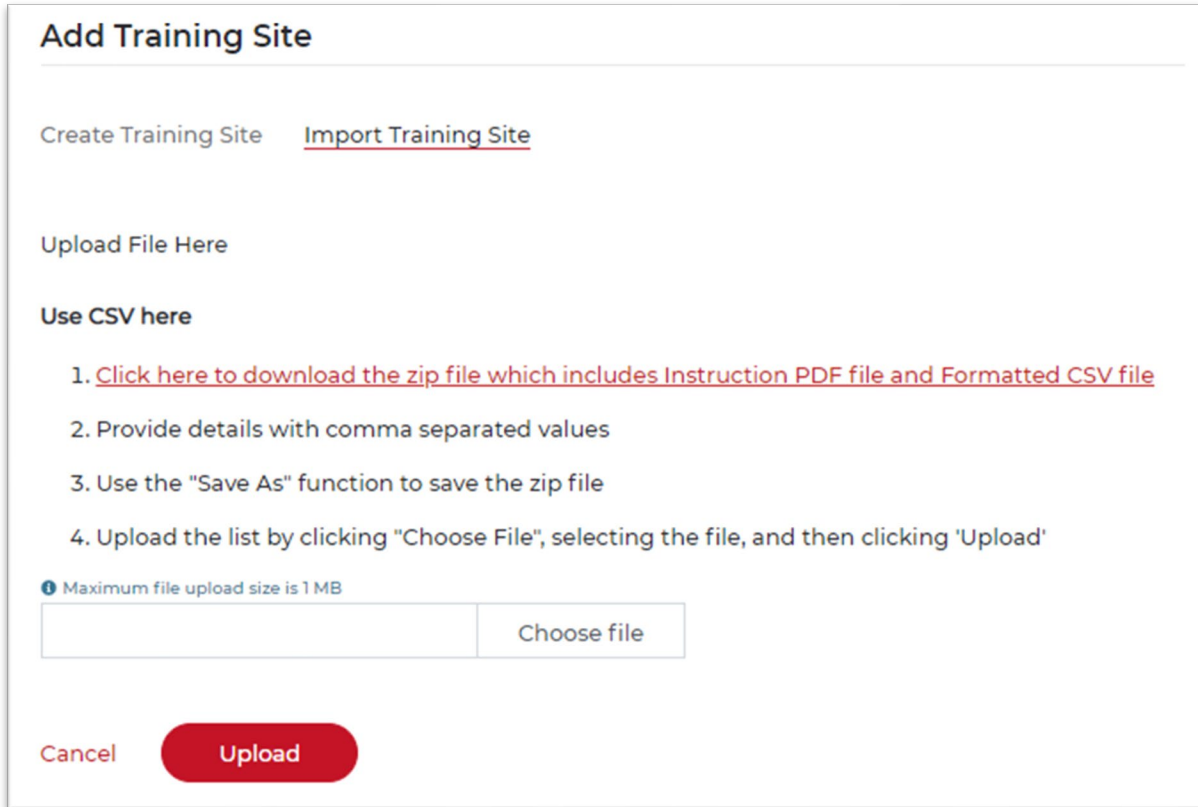


Figure 12. Directions for downloading PDF and CSV files.

- The **Instructions PDF file** contains information about the mandatory fields needed to create the **Training Sites**, where to enter those details in the CSV file, and how to upload it.
- The formatted CSV file is a template that will allow users to easily provide details for multiple Training Sites in the correct format for the system to complete the action.
- Once the data have been accurately entered into the CSV file, and it is ready to upload, users should save it to a local drive. Next, they should select the **Choose File** button and then open the appropriate file (Figure 13).

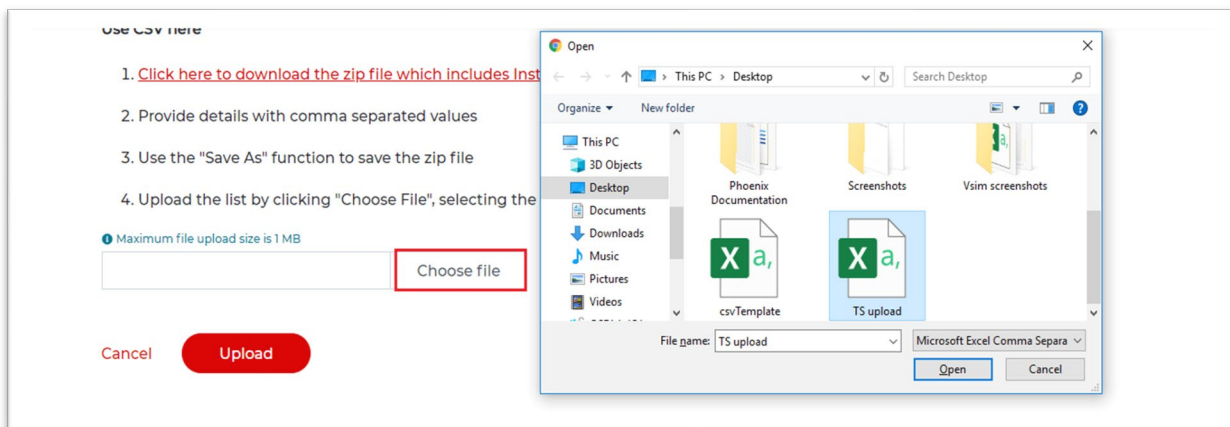


Figure 13. File Explorer window opened, showing files that can be uploaded.

- Once the file has been selected, users should select the **Upload** button (Figure 14).

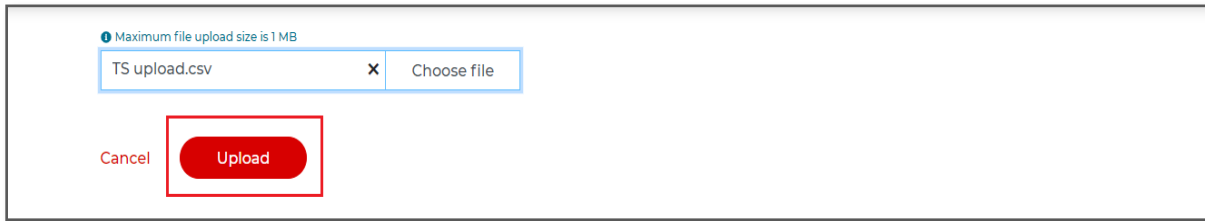


Figure 14. Upload button.

- Upon successful completion of the upload, users will be navigated back to the **Training Sites** page. After some time, they will be able to view the new Training Site in the records list. To view the status of the upload, users should follow the steps in the View Upload History section of this guide.

5.1.3 View Upload History

- From the **Training Sites** page, users should select **View Upload History** (Figure 15).

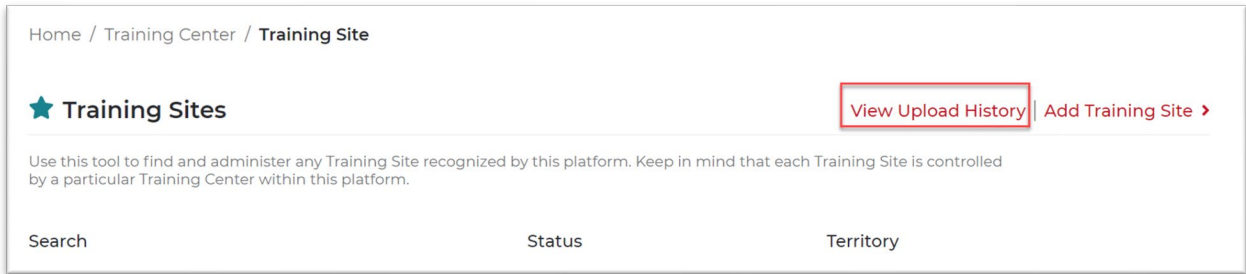


Figure 15. View Upload History link.

- Users will be navigated to the **Upload TS History** page. This page contains a historical record of the user's Training Center uploads of Training Sites and the results of each upload (Figure 16).

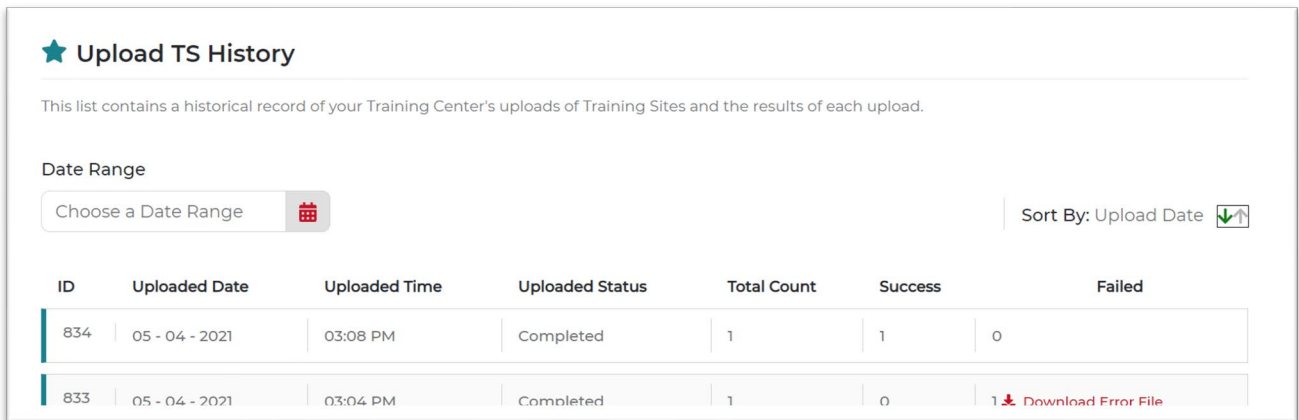




Figure 16. Upload TS History page.

- If a CSV file was uploaded successfully (without errors), then the record appears as shown in Figure 17.

Date Range 

Sort By: Upload Date 

ID	Uploaded Date	Uploaded Time	Uploaded Status	Total Count	Success	Failed
834	05 - 04 - 2021	03:08 PM	Completed	1	1	0

Figure 17. Record showing CSV file was uploaded successfully.

- If a CSV file was not uploaded successfully (containing errors), then the record appears as shown in Figure 18.


ID	Uploaded Date	Uploaded Time	Uploaded Status	Total Count	Success	Failed
219	03 Nov 2020	01:12 AM	Completed	0	0	0
218	03 Nov 2020	12:58 AM	Completed	5	0	5  Download Error File

Figure 18. Record showing CSV file was not uploaded successfully.

- To download the error file for an upload record, users may select the **Download Error File** link as shown in the Failed column of the record (Figure 19). A prefixed number shown next to the **Download Error File** link indicates the number of failed records.


218	03 Nov 2020	12:58 AM	Completed	5	0	5  Download Error File
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Figure 19. Download Error file link showing 5 failed records.

- The error file downloads as a CSV file (Figure 20).



Figure 20. Error File CSV file.

- The Error_file.csv will have a separate column titled **Error**, which contains the information about the encountered errors when uploading the file.
- Users should correct the errors indicated in the file and attempt to upload it again to successfully add a new Training Site.

Upload History List

The **Upload TS History** list displays a historical record of the user's Training Center uploads of Training Sites and the results of each upload. This list may be sorted, exported, and filtered by using the **Date Range** feature. The individual upload records also allow users to take actions.

- The **Date Range** feature allows users to filter the upload list (Figure 21).

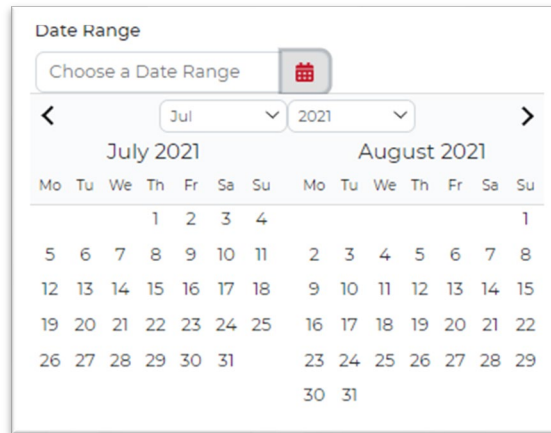


Figure 21. Date Range filter selected, showing a calendar.

- Using the **Sort by** feature, users may also sort the records in ascending or descending order by **Upload Date** (Figure 22).

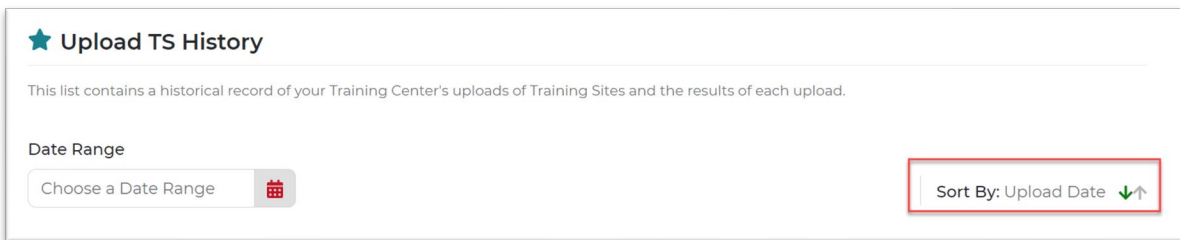


Figure 22. Sort By drop-down menu.

5.1.4 Record Actions

View Training Sites

- To view a Training Site, users should navigate to the **Actions** column in the records list and select the 3 dots (...). From the pop-up box, they will select the **View/Edit** link (Figure 23).

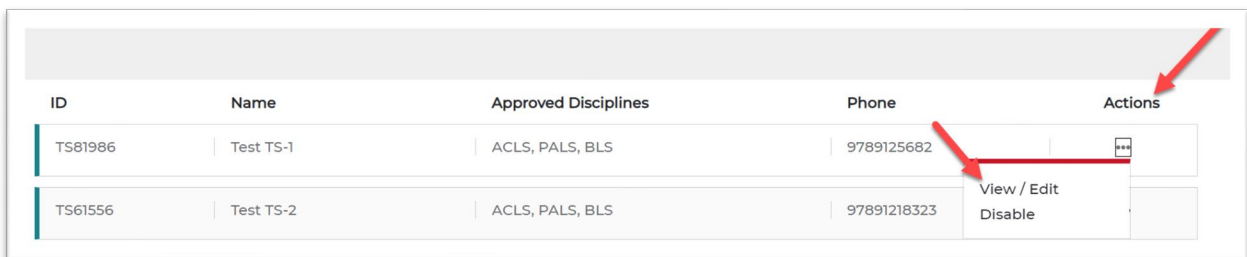


Figure 23. Training Site View/Edit link.

- The **Training Site Details** page will appear (Figure 24).

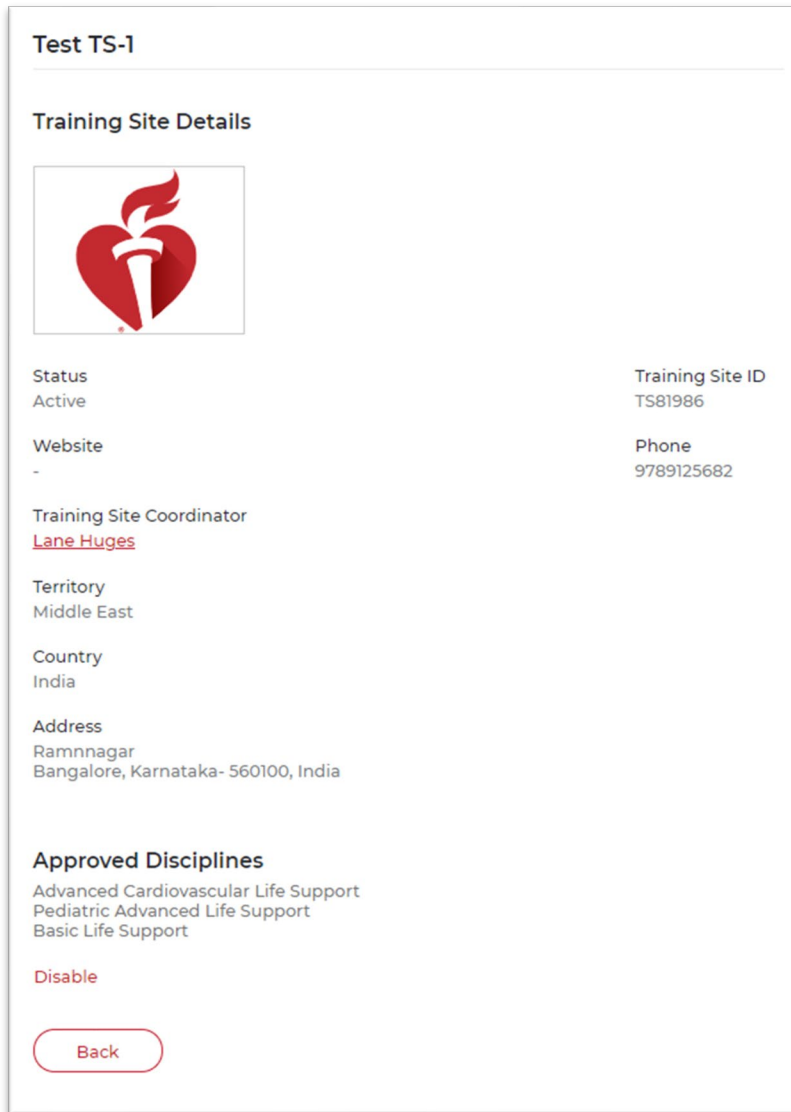


Figure 24. Training Site Details page.

- From the **Training Site Details** page, users may return to the **Training Sites** page, and the main list, by selecting the **Back** button (Figure 25).

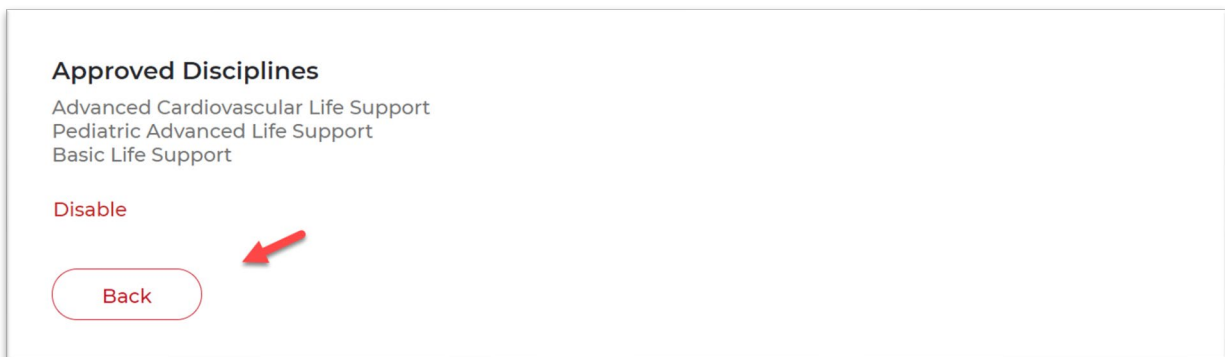


Figure 25. Training Site Details page showing the Back button.

Edit Training Sites

- From the **Training Site Details** page, users may select the Edit link to edit a Training Site (Figure 26).

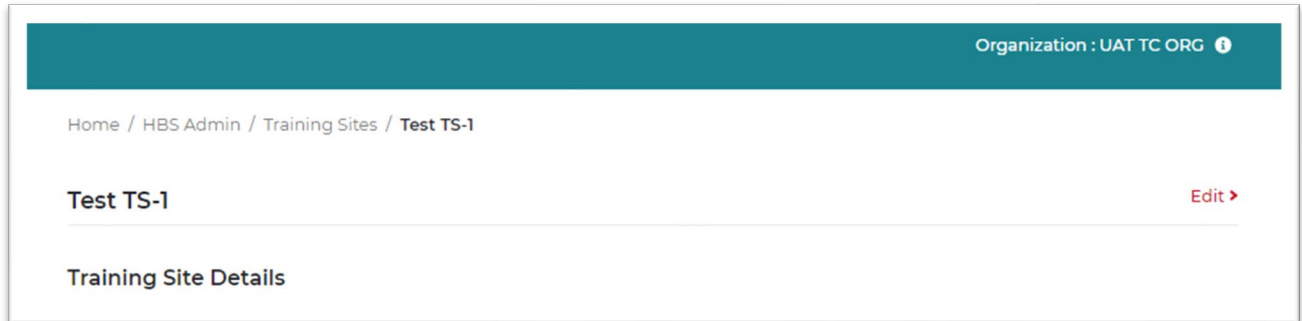


Figure 26. Training Site Details page showing the Edit link.

- Once the **Edit** link is selected, the system displays the **Edit Training Site** page (Figure 27). Fields that are grayed out may not be changed.

Edit Training Site

Training Site Name*

Training Site ID*

Training Site Status *

Website

Office Phone *

Disciplines *

Upload Image

Maximum file upload size is 1 MB, Format in .jpg, .png

Street Address 1 *

Street Address 2

Country *

Territory *

State *

City *

Postal / Zip Code *

Figure 27. Edit Training Site fields.

Note: The **Training Site ID**, **Training Site Status**, and **Territory** fields are not editable from the **Edit Training Site** page.

- Once all changes have been made, users should select the **Update** button.

- Users will be navigated back to the Training Sites page, where a confirmation message will appear that states, **“Data Saved Successfully”** (Figure 28).



Figure 28. Training Site data update confirmation message.

Disable or Delete Training Sites

Important: If a Training Site has no data associated with it, it may be deleted. Otherwise, the Training Site may only be disabled.

- To disable (or delete) a Training Site, users should navigate to the **Action** column for a Training Site Record and select the 3 dots (...). From the pop-up box, users may then select the **Disable (or Delete)** link (Figure 29).

ID	Name	Approved Disciplines	Phone	Actions
TS81986	Test TS-1	ACLS, PALS, BLS	9789125682	⋮
TS61556	Test TS-2	ACLS, PALS, BLS	97891218323	View / Edit Disable

Figure 29. Training Site Disable link.

- Alternatively, users may perform the same action from the **Training Site Details** page (Figure 30).

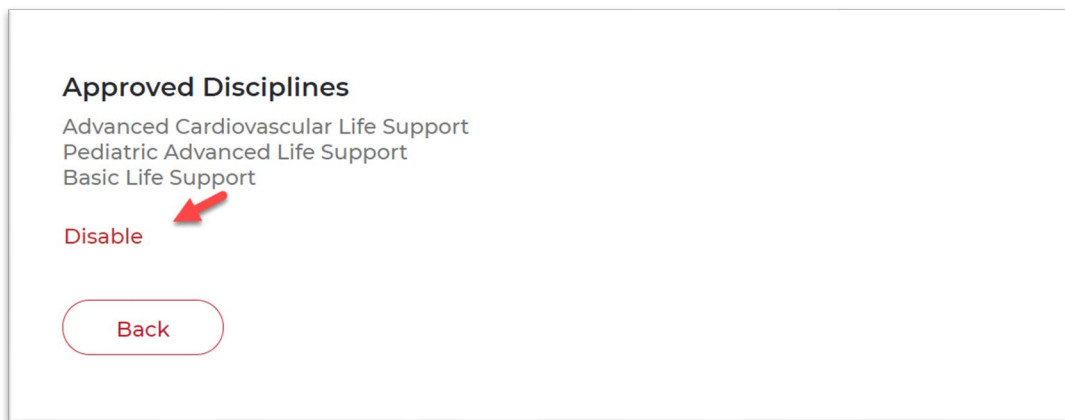


Figure 30. Training Site Details page showing the Disable link.

- A pop-up will appear asking for confirmation of the disable/delete action from the user. To proceed, users must select the **Disable Training Site** button (Figure 31).

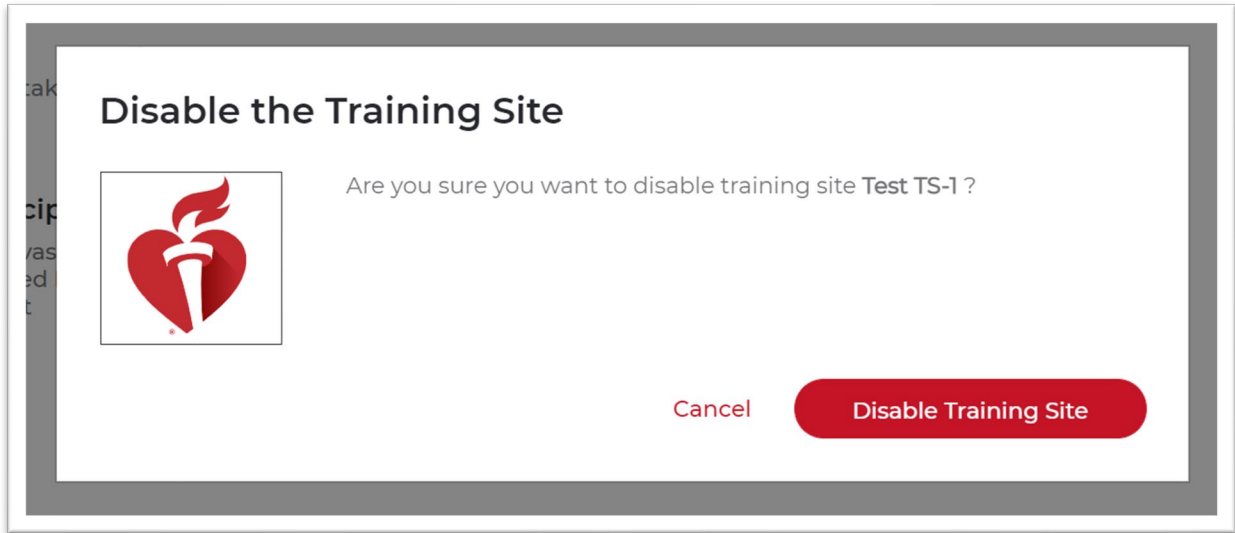


Figure 31. Disable the Training Site confirmation pop-up.

- Selecting **Cancel** directs users back to the **Training Site Details** page.
- Selecting **Disable Training Site** returns users to the **Training Site Details** page with a confirmation that the action was completed successfully. The Training Site will now have an **Inactive** status.

Enable Training Sites

A deactivated Training Site may be reenabled with the following steps:

- Inactive Training Sites may be viewed by selecting **Inactive** from the **Status** drop-down menu on the **Training Sites** page and filtering the list accordingly (Figure 32). The search for inactive Training Sites may be further refined by entering a name or ID into the **Search** field or choosing other filter drop-down lists.

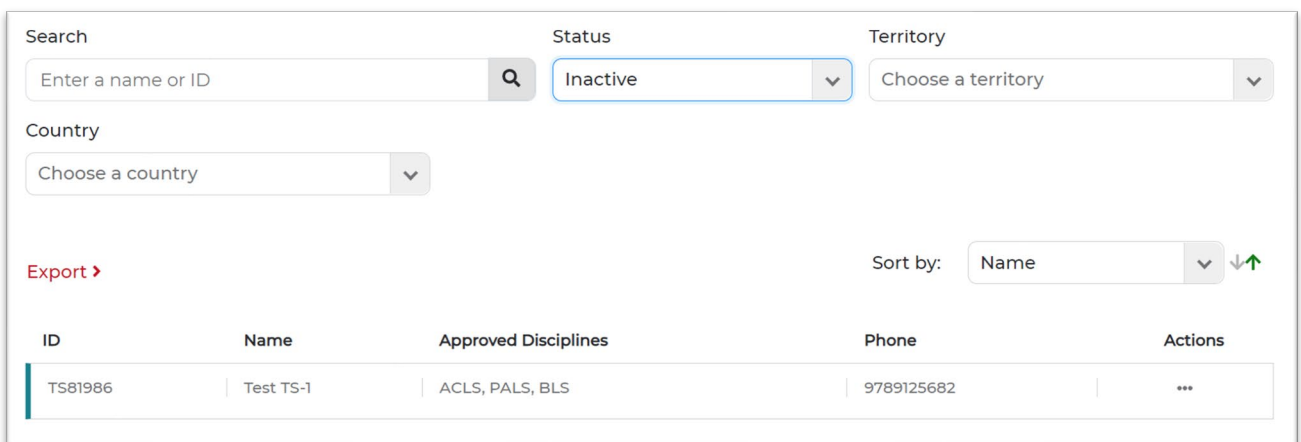


Figure 32. Inactive Training Sites.

- To **Enable** a currently inactive Training Site, users should navigate to the **Actions** column for a Training Site Record and select the 3 dots (...). From the pop-up box, they should select **Enable** (Figure 33).

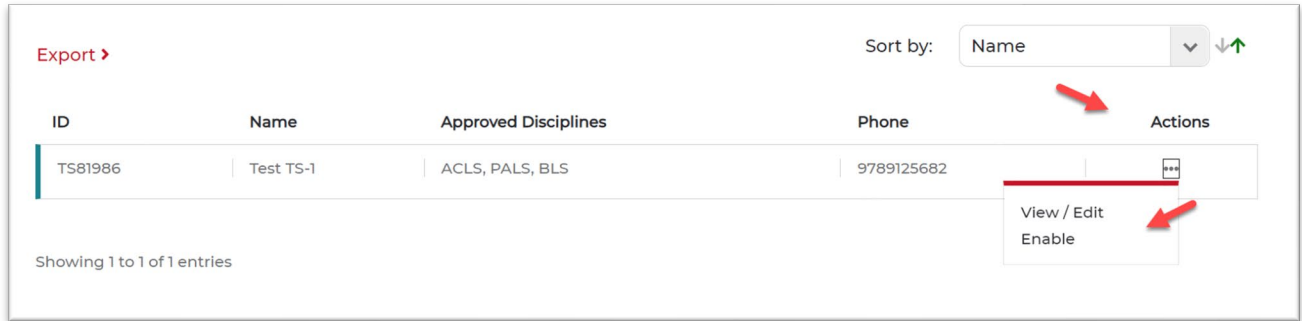


Figure 33. Training Site Enable link.

- Alternatively, users may select the **Enable** link from the **Training Site Details** page (Figure 34).

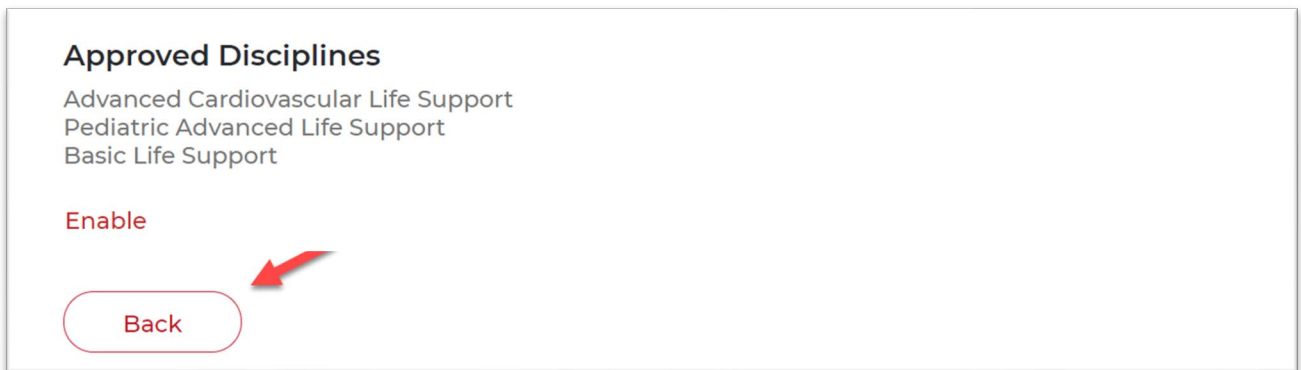


Figure 34. Training Site Details page showing the Enable link.

- A pop-up will appear asking for confirmation of the enable action from the user. To proceed, users must select the **Enable Training Site** button (Figure 35).

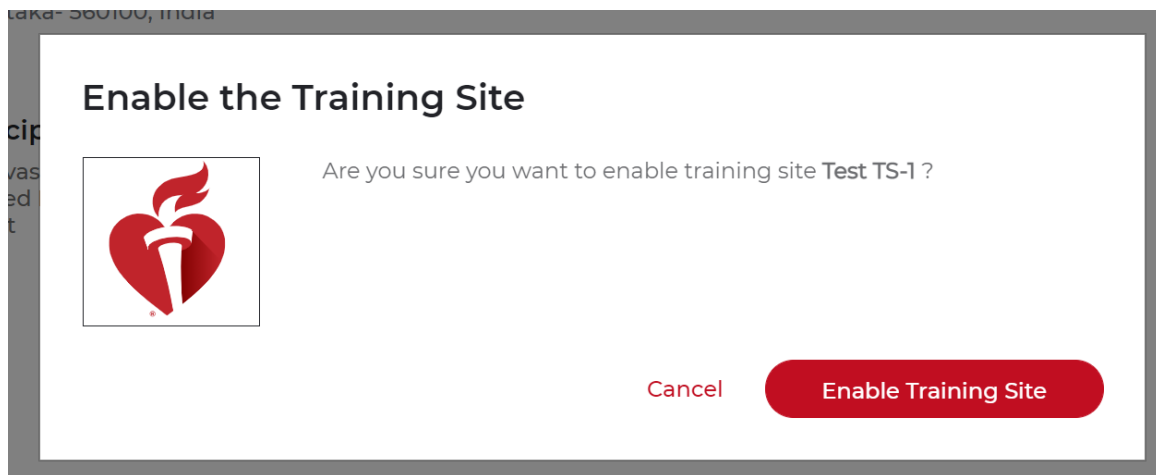


Figure 35. Enable the Training Site confirmation pop-up.

- Selecting **Cancel** directs users back to the **Training Site Details** page.
- Selecting **Enable Training Site** returns users to the **Training Site Details** page with a confirmation that the action was completed successfully (Figure 36). The Training Site will now have an **Active** status.

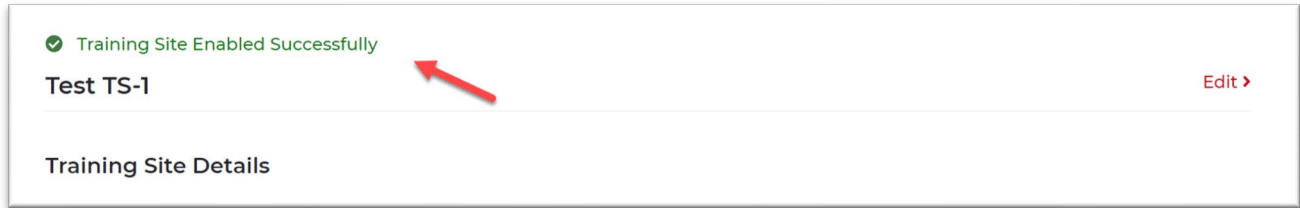


Figure 36. Training Site enabled confirmation message.