

Job Aid: Atlas Class Management – View and Edit “eCard Inventory Comes From” Settings

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“eCard Inventory Comes From” Settings

A Training Center Coordinator (TCC)/Training Site Coordinator (TSC) can set where the eCard inventory comes from when using the Class Management tool in Atlas. This parameter may be set at the TC and TS level but can be overridden at the Instructor level. Therefore, the TC/TS setting and the Instructor setting work together to guide the action.

The Class Management tool reserves eCards for students in a class when the Instructor finalizes a roster for the class (to finalize a roster, see the [Job Aid: Atlas Class Management – Manage a Class](#)). By reserving the eCards, they appear as “reserved” in the inventory view. Reserved eCards cannot be distributed to or issued to anyone other than the students listed on the finalized roster, as “students in progress.” The only way an eCard is released from the “reserved” status is if a student fails the class and is removed from the roster.

For additional references see the Job Aids:

- Job Aid: View/Edit Training Center/Training Site Information in Atlas
- Job Aid: View Instructor Information in Atlas

TC/TS Settings for “eCard Inventory Comes From”

1. To View TC/TS information:

- 1.1. Once logged in, click the Training Center tab
- 1.2. Click Training Center or, to view the Training Site, click Training Site
- 1.3. If the user has more than one organization in Atlas (a TC, TS, or multiple TSs) a color banner will appear with a data selection dropdown box. Select the organization view from the dropdown menu.
- 1.4. Scroll down the page to view the details
- 1.5. The parameter for “eCard Inventory Comes From” is toward the bottom of the page

NOTE: the default setting is “Individual”

2. To Edit your TC/TS information:

- 2.1. On the TC details page select Edit to the left of the organization name
 - 2.1.1. Scroll down the details page to the “eCard Inventory Comes From” parameters
 - 2.1.2. “eCard Inventory Comes From” **DEFAULT setting is Individual**
 - i. Training Center selection means when a class roster is “finalized” the eCards for the students in the class are marked “reserved” in the TC’s eCard inventory
 - ii. Individual selection means when a class roster is “finalized” the eCards for the students in the class are marked “reserved” in the Instructor’s eCard inventory
 - 2.1.3. To change the setting, click Training Center (Figure 1)



The screenshot shows a settings interface with two input fields at the top: "Enrollment Cutoff Date" and "Withdrawal Cutoff Date", each with a "Days Before" button. Below these is the "eCard Inventory Comes From *" section, which has two radio buttons: "Training Center" (which is selected) and "Individual". A red arrow points to the "Training Center" radio button.

Figure 1

- 2.1.4. When all edits are complete, click the Update button at the bottom of the page

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2.1.5. A success message will appear at the top of the page

Instructor Settings for “eCard Inventory Comes From”

1. To View or Edit the Instructor information:
 - 1.1. Once logged in, click the Training Center tab
 - 1.2. Click Instructors to view all of the Instructors for the organization
 - 1.3. Scroll down to the Instructor list
 - 1.4. Find the Instructor in the list
 - 1.4.1. Go to the Actions column
 - 1.4.2. Click the ellipses (...)
 - 1.4.3. Select Permissions and Alignments from the list of values
 - 1.5. On the Alignments for the page
 - 1.6. Scroll down to just below the disciplines list to view the setting for “eCard Inventory Comes From”
 - 1.6.1. To edit the parameter select either
 - iii. **Training Center** – This selection means when a class roster is “finalized” the eCards for the students in the class are marked “reserved” in the TC’s eCard inventory
 - iv. **Individual** – This selection means when a class roster is “finalized” the eCards for the students in the class are marked “reserved” in the Instructor’s eCard inventory

NOTE: The default setting is “Individual,” and this setting overrides the setting at the TC/TS level

- 1.6.2. To change the setting, click Training Center (Figure 2)

Disciplines

✓ Heartsaver
Alignment Expiration
 None Specified Date

✓ BLS
Alignment Expiration
 None Specified Date

01/29/2024 × 📅

eCard Inventory Comes From
 Training Center Instructor

Figure 2

- 1.6.3. When all edits are complete, click the Update button at the bottom of the page
- 1.7. A success message will appear at the top of the Instructors page