Site Administrator
Training Checklist

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| **Feature** |  |
| **SITE CONFIGURATION** | **ACTION STEPS** |
|  | I can use WIDS edit functions |  |
|  | I can customize site preferences |  |
|  | I can add/update Internal Help  |  |
|  | I can manage lookups |  |
|  | I can manage learning taxonomy |  |
|  | I can configure custom fields |  |
| **Notes:** |
| **UNITS/SUBUNITS** | **ACTION STEPS** |
|  | I can update the unit/subunit structure  |  |
| **Notes:** |
| **ROLES AND PERMISSIONS** | **ACTION STEPS** |
|  | I can assign/update roles and permissions |  |
|  | I can customize roles |  |
|  | I can add/clone roles |  |
| **Notes:** |

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| **USER MANAGEMENT** | **ACTION STEPS** |
|  | I can add/edit users |  |
|  | I can update user project affiliation |  |
|  | I can edit existing system roles |  |
|  | I can add/clone roles  |  |
|  | I can assign roles to system users |  |
| **Notes:** |
| **EXTERNAL STANDARDS AND LIBRARIES** | **ACTION STEPS** |
|  | I can locate external standards |  |
|  | I can update libraries |  |
| **Notes:** |
| **MANAGE PROJECTS** | **ACTION STEPS** |
|  | I can update the status of a project |  |
|  | I can add a project notification |  |
|  | I can share projects |  |
|  | I can upload shared projects |  |
|  | ***WTCS ONLY:*** *I can import projects from the WTCS Repository* |  |
|  | ***WTCS ONLY:*** *I can share projects to the WTCS Repository* |  |
| **Notes:** |

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| **DOCUMENTS** | **ACTION STEPS** |
|  | I can create folders |  |
|  | I can add documents |  |
|  | I can search for documents |  |
| **Notes:** |
| **ARCHIVE PROCEDURES** | **ACTION STEPS** |
| I can run a one-time archive process |  |
| I can set up an archive schedule |  |
| **Notes:** |
| **ORGANIZATION** | **ACTION STEPS** |
|  | I can update organization information |  |
|  | I can update organization outcomes |  |
|  | I can create customized and/or default templates |  |
| **Notes:** |

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| **REPORT CENTRAL & ARCHIVING** | **ACTION STEPS** |
|  | I can generate administrative reports |  |
|  | I can generate course/program/organization project reports |  |
|  | I can update report results |  |
|  | I can create personal and shared templates  |  |
|  | I can locate reports I generated |  |
|  | I can configure site archiving |  |
| **Notes:** |
| **GENERAL NOTES AND FOLLOW-UP ITEMS** |
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