



# Local Administrator Website Guide



Log in to your VIRTUS account at [www.virtus.org](http://www.virtus.org)  
to review the functionalities of the VIRTUS Platform.

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

## **Frequently Asked Questions:**

*How do I view my own location's employees and volunteers who have online registrations within VIRTUS Online? Pg. 2*

*How do I search the entire organization to view if a particular person has an online registration, make changes to their account and/or affiliate them with my location? Pg. 3*

*How do I assist with recovering an individual's username or password as a Local Administrator? Pg. 5*

*How do I create a Master Report within VIRTUS Online? Pg. 6*

*How do I view my own personal online training completion/requirements and print my certificate? Pg. 8*

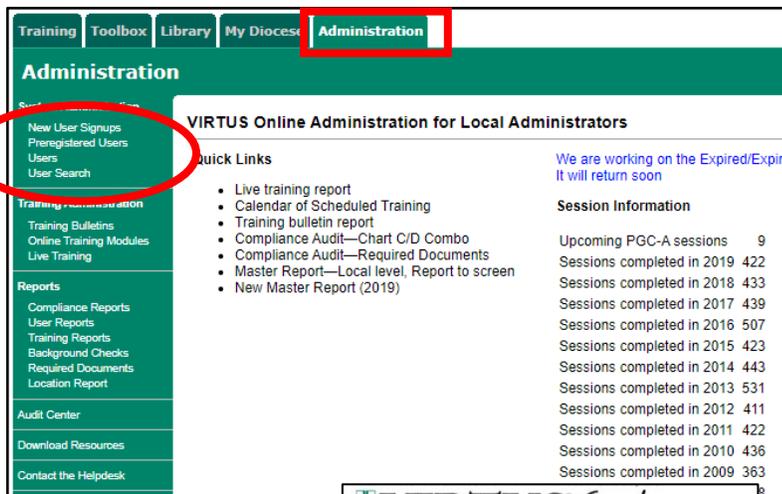
*How do I review an account to see if a background check, required document, and/or training have been completed? Pg. 9*

*How to view scheduled sessions and print attendance sheets? Pg. 10*

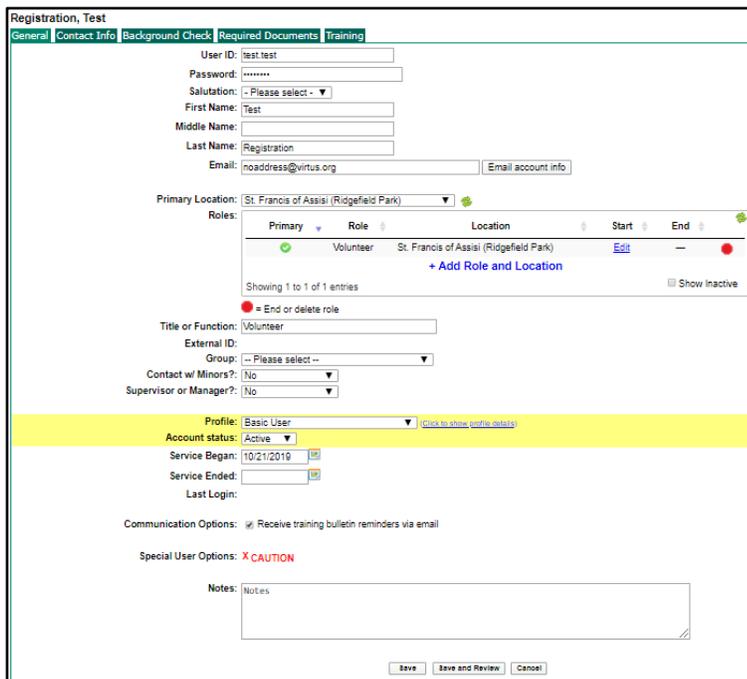
*If an individual took the training in another Diocese, how do we ensure the training appears in the Database? Pg. 12*

# How do I view my own location's employees and volunteers who have online registrations within VIRTUS Online?

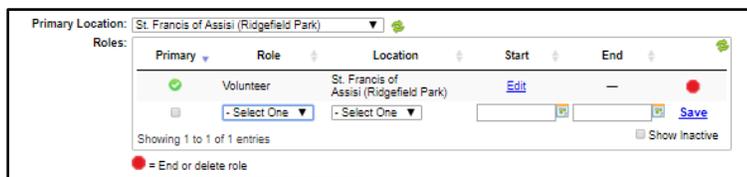
1. Select the "Administration" tab from the tabs at the top of the page:
  - a. New User Signups – indicates that the training session has past and the user is awaiting approval.
  - b. Preregistered Users – indicates that the user registered an upcoming session (the coordinators will be notified via email of the registration)
  - c. Users – indicates the list of users within the coordinators location(s)
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". If an individual is missing from your list:



- a. First, double check other possibilities of name spellings, including hyphenated last names and nicknames.
- b. Additionally, the person may not have registered online, or they may have registered themselves with a different location within your organization.
- 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.
- d. To fully inactivate a record, please click on the Inactive selection from the dropdown within Account status.
- e. If a **Caution** appears in the Special User Options, please contact the Diocesan Safe Environment Office to determine the issue. The issue may appear in the Notes section.

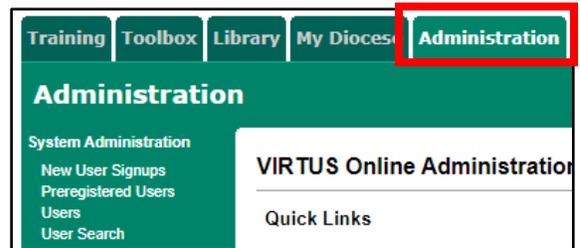


- f. To update Location and Role, click on **Add Role and Location** and select Role, Location and Start Date (if unknown, leave blank or put the date you enter the update) and **Save**. To inactivate a Role/Location, click on the red **stop sign** to inactivate or delete if it is an incorrect selection. The green check signifies the primary location and role.



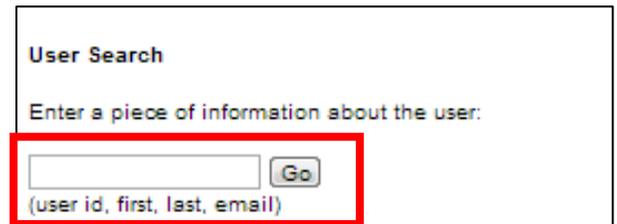
# How do I search the entire organization to view if a particular person has an online registration, and make changes to their account and/or affiliate them with my location?

1. Select the “Administration” tab from the tabs at the top of the page;

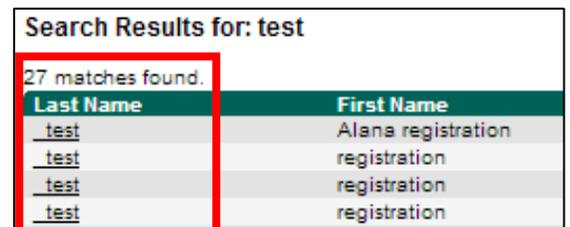


2. Search in the Search box for individual users, then select “Go”. For searching tips:

- a. Insert the letters of the individual’s last name, first name, user id **or** the email address. Each one of these items must be searched separately and cannot be combined into one individual search (i.e., “John Smith” must either be searched as “John” or “Smith”).
- b. Searching with the first several letters of the last name usually yields the best and largest scope of results (i.e., search “Smi” rather than just “Smith”).
- c. If a particular individual is missing, double check other possibilities of name spellings, including hyphenated last names and nicknames. It is also best to search more than once for the same person using a different search query.

A screenshot of the 'User Search' form. The title is 'User Search'. Below the title, it says 'Enter a piece of information about the user:'. There is a text input field and a 'Go' button. A red box highlights the input field and the 'Go' button. Below the input field, it says '(user id, first, last, email)'.

User Search	
Enter a piece of information about the user:	
<input type="text"/>	Go
(user id, first, last, email)	

A screenshot of search results for the query 'test'. The title is 'Search Results for: test'. It shows '27 matches found.' followed by a table with two columns: 'Last Name' and 'First Name'. The first four rows are highlighted with a red box. The first row shows 'test' in the Last Name column and 'Alana registration' in the First Name column. The other three rows show 'test' in the Last Name column and 'registration' in the First Name column.

Search Results for: test	
27 matches found.	
Last Name	First Name
test	Alana registration
test	registration
test	registration
test	registration

3. If a match is found, then click on the person's last name to view their account

**Note:** Within the searched person's account page, 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. In this case, the Local Administrator should communicate with the Diocesan Coordinator to request that the individual's account be updated with the appropriate affiliated location.

If the searched person's "Primary" or "Additional" locations match the Administrator's, then the Local Administrator will be able to update/save changes to their account, including the ability to change the person's "Profile," "Email Address," etc.

Primary	Role	Location	Start	End
<input checked="" type="checkbox"/>	Volunteer	St. Francis of Assisi (Ridgefield Park)	<a href="#">Edit</a>	—
<input type="checkbox"/>	<a href="#">- Select One</a>	<a href="#">- Select One</a>	<input type="text"/>	<input type="text"/>

Showing 1 to 1 of 1 entries [Save](#)  Show Inactive

● = End or delete role

[Save](#) [Save and Review](#) [Cancel](#)

4. If a match is **not** found, it may be that the person did not create an online registration and still needs to create one.

# 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

User ID:	<input type="text" value="test201909261226"/>
Salutation:	<input type="text" value="Mr."/>
First Name:	<input type="text" value="Registration"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text" value="Test"/>
Email:	<input type="text" value="noaddress@virtus.org"/>

- 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](http://www.virtus.org)

# How do I create a Master Report within VIRTUS Online?

There are three ways to get to the Master Report screen after selecting the Administrative Tab.

**VIRTUS Online Administration**

**Quick Links**

- Approve users
- Schedule a session
- Live training report
- Calendar of Scheduled Training
- Rankings
- Training bulletin report
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Master Report—Local level, Report to screen
- Master Report—Downloadable Spreadsheet
- New Master Report (updated for 2019)

**Session Information**

Upcoming Sessions	6
Sessions completed in 2015	6
Sessions completed in 2014	30
Sessions completed in 2013	36
Sessions completed in 2012	37
Sessions completed in 2011	30
Sessions completed in 2010	44

There are three ways to get to the Master Report screen. If selecting "Compliance Reports" then select "Master Report." If selecting "Audit Center" then select "Master Report."

The Master report allows for a variety of selections and combinations to filter your database information to customize a report. This is the top half of the screen. Make selections from this menu.

**Master Report**

Location: -- Select a location -- (required)

Profile: ALL PROFILES

Role: ALL ROLES

Group: ALL GROUPS

Report Period: Start: [ ] End: [ ]  
Limits results to users who were active in the selected date range; however, all training bulletins will display.

Special Options:  
 Show bulletin counts for users who are not required to complete continuing training  
 Show the location of live training

Display Options:  
 Display YES or NO for compliance items  
 Display the date for compliance items

Filters:  
 Show inactive users  
 Active  Completed PGCA Live Training  Completed Background Checks  
The checkboxes limit the results to users that were active, completed training, or completed a background check during the report period. Previously, the report only checked "active". If none are checked then the date filters will not be used. Report will be limited to users meeting all checked criteria.

User Fields to Display:  
 Last Name, First Name  
 Login ID  
 Status  
 Email  
 Middle Initial  
 Salutation  
 Address  
 City  
 State  
 ZIP  
 Daytime Phone  
 Evening Phone  
 Primary Location  
 Profile  
 Roles (Increases processing time)  
 Group  
 Position  
 Continuing Training Status  
 Approval Date  
 Registration Date  
 Database ID (May assist VIRTUS Helpdesk)  
 User Notes

In order to generate the most effective report, make the desired selections to create the needed report.

Compliance Fields to Display:	<p><b>Live Training</b></p> <input type="checkbox"/> Protecting God's Children for Adults <input type="checkbox"/> Protecting God's Children for Facilitators <input type="checkbox"/> Office of Child & Youth Protection, Policy Compliance <input type="checkbox"/> Praesidium Training-Religious Orders
	<p><b>Bulletins</b></p> <input type="checkbox"/> Protecting God's Children for Adults
	<p><b>Online Training</b></p> <input type="checkbox"/> The Safe Environment Awareness Program for International Priests™ <input type="checkbox"/> Protecting God's Children® Online Awareness Session 2.0 <input type="checkbox"/> Protecting God's Children® Online Awareness Session (Spanish Version 2) <input type="checkbox"/> Healthy Relationships for Teens <input type="checkbox"/> Healthy Relationships for Teens/PGCA <input type="checkbox"/> Bullying/Cyberbullying <input type="checkbox"/> Protecting God's Children® Online Awareness Session 3.0 (Spanish) <input type="checkbox"/> Protecting God's Children® Online Maltreatment Awareness Session 3.2 <input type="checkbox"/> Protecting God's Children® Online Awareness Session 3.0 <input type="checkbox"/> Virtus® Protecting God's Children® Re-certification Training for Adults <input type="checkbox"/> Virtus® Protecting God's Children® Re-certification Training for Adults—2nd Edition <input type="checkbox"/> Virtus® Protecting God's Children® Re-certification Training for Facilitators
	<p><b>Background Checks</b></p> <input type="checkbox"/> Any background check
	<p><b>Required Documents</b></p> <input type="checkbox"/> Code of Conduct
<input type="button" value="Run report to screen"/> <input type="button" value="Run report to Excel"/>	

It is advisable to "Run report to screen" first to make sure the report is what you expected. If not, you can go back to this screen and select other options.

## Generate the New Master Report

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 administrators to filter user requirements revealing only the most recent dates of completion.

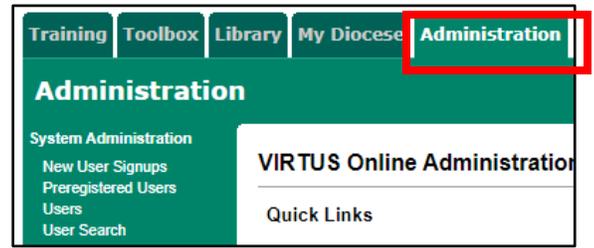
This report offers you the flexibility of combining or listing requirements separately.

In addition to filtering locations and/or roles, the new 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.

<p><b>Administration</b></p> <p>System Administration          New User Signups          Preregistered Users          Users          User Search          Roles          Profiles          Locations          Groups          Communication Center          Messages Board          System Setup</p> <p><b>Training Administration</b>          Training Bulletins          Online Training Modules          Live Training</p> <p><b>Reports</b>          Compliance Reports          User Reports          Training Reports          Background Checks          Required Documents          Location Report</p> <p><b>Background Checks</b>          Manager</p> <p><b>Audit Center</b></p> <p><b>Download Resources</b></p> <p><b>Contact the Helpdesk</b></p>	<p><b>Master Report</b></p> <p><b>Filters</b></p> <p>-- All Locations --          All Saints Catholic School- Broken Arrow (Broken Arrow)          Bishop Kelley HS (Tulsa)          Calvary Cemetery (Tulsa)          Cascia Hall (Tulsa)          Catholic Charities of Eastern Oklahoma (Tulsa)          Chancery (Broken Arrow)</p> <p><b>Location:</b></p> <p>-- All Roles --          Bishop          * Candidate for ordination          Catholic Charities Employee          Catholic Charities Volunteer          * Deacon          * Educator</p> <p><b>Role:</b></p> <p><b>User Fields</b></p> <input checked="" type="checkbox"/> Last <input checked="" type="checkbox"/> First <input type="checkbox"/> Middle <input type="checkbox"/> Salutation <input type="checkbox"/> Login ID <input type="checkbox"/> Email <input checked="" type="checkbox"/> Account Status <input checked="" type="checkbox"/> Primary Location <input checked="" type="checkbox"/> All Locations (select to find users in secondary sites) <input checked="" type="checkbox"/> Roles <input checked="" type="checkbox"/> Profile <input checked="" type="checkbox"/> Position <input checked="" type="checkbox"/> Continuing Training Status <input type="checkbox"/> Address <input type="checkbox"/> City <input type="checkbox"/> State
--	--

# How do I view my own online personal training completion/ requirements and print my certificate?

1. There are multiple ways to view your completed training. One way is to select the "Training" Tab from the tabs at the top of the page; then, click on "Training Compliance" and then "Training Report"



2. As shown below, all completed training and training bulletins read will be listed. It is also possible to print a certificate by clicking on the certificate icon.



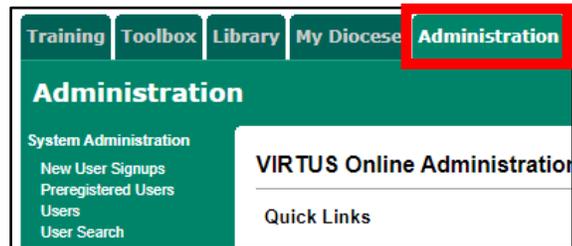
LIVE TRAINING			
Title	Date	Training Location	Status
Protecting God's Children for Adults	10/07/2006 1:30 PM	Center for Pastoral Leadership (Wickliffe)	Approved 

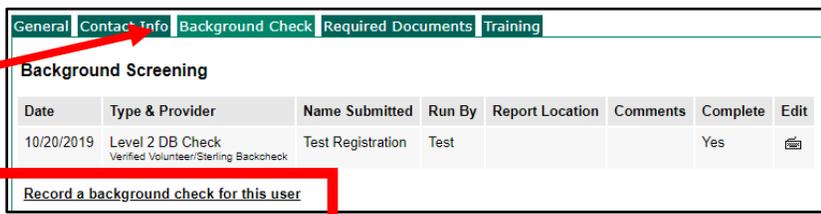
TRAINING BULLETINS			
Type	Featured	Read	Missed
Protecting God's Children for Adults <a href="#">(click here for details)</a>	111	110	1

# How do I review an account to see if a background check, required document and/or training have been completed?

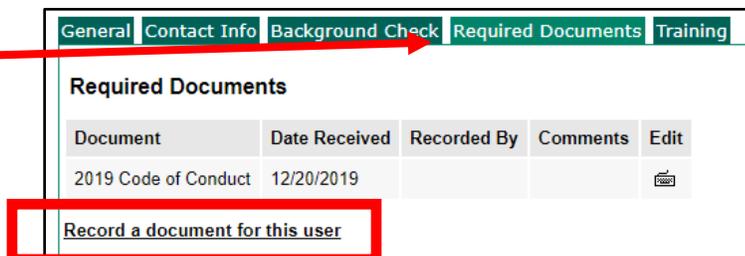
1. In order to review an account's main profile page, the Local Administrator must first search for the user and click on the person's name to open up the profile. If the Local Administrator is having difficulties locating an individual who has an account, please view the section in this document entitled,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



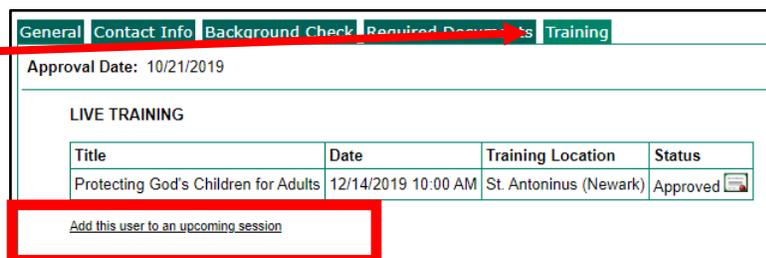
2. To view the Background Check, select the "Background Check" tab. To record a background check, please click on Record a background check for this user.



3. To view a Required Document acknowledgment, select the Required Documents Tab. To record a required document, please click on Record a document for this user.



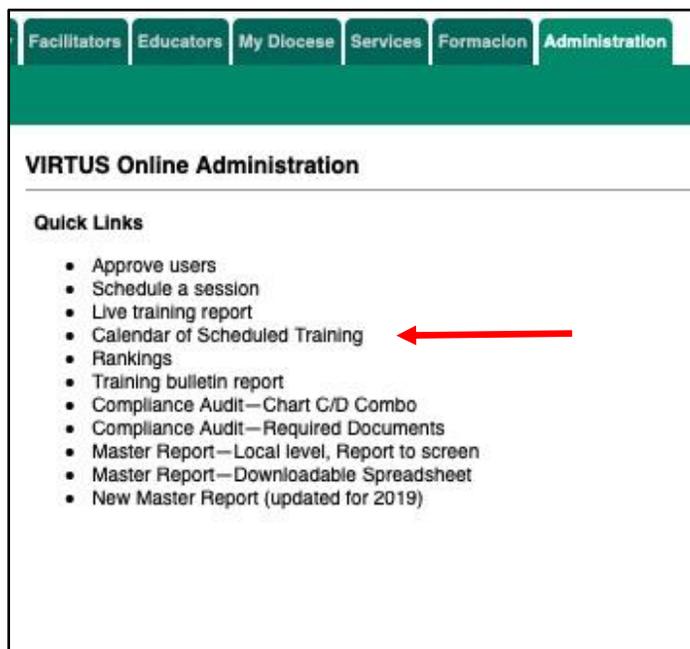
4. To view a training information, select the Training Tab. To add this user to an upcoming session, please click on Add this user to an upcoming session.



# 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.

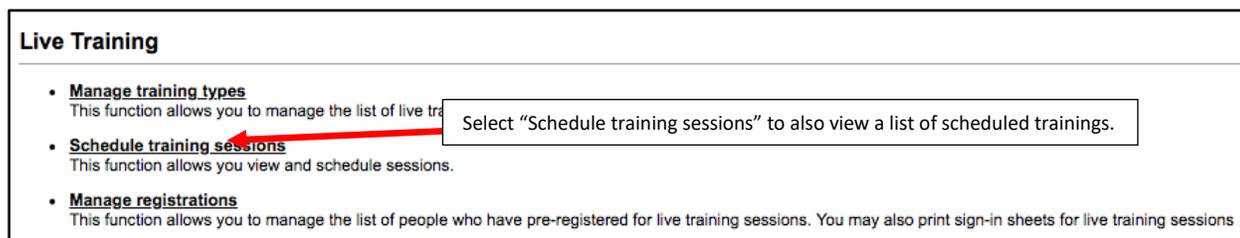


If “Calendar of Scheduled Training” is selected, this screen is displayed. Note the print icon.

The screenshot shows the 'Calendar of Scheduled Training' page. At the top right, there is a 'Printer friendly' icon with a red arrow pointing to it. Below the icon is a search bar with 'From:' and 'To:' fields and a 'Go' button. The main content is a table with the following data:

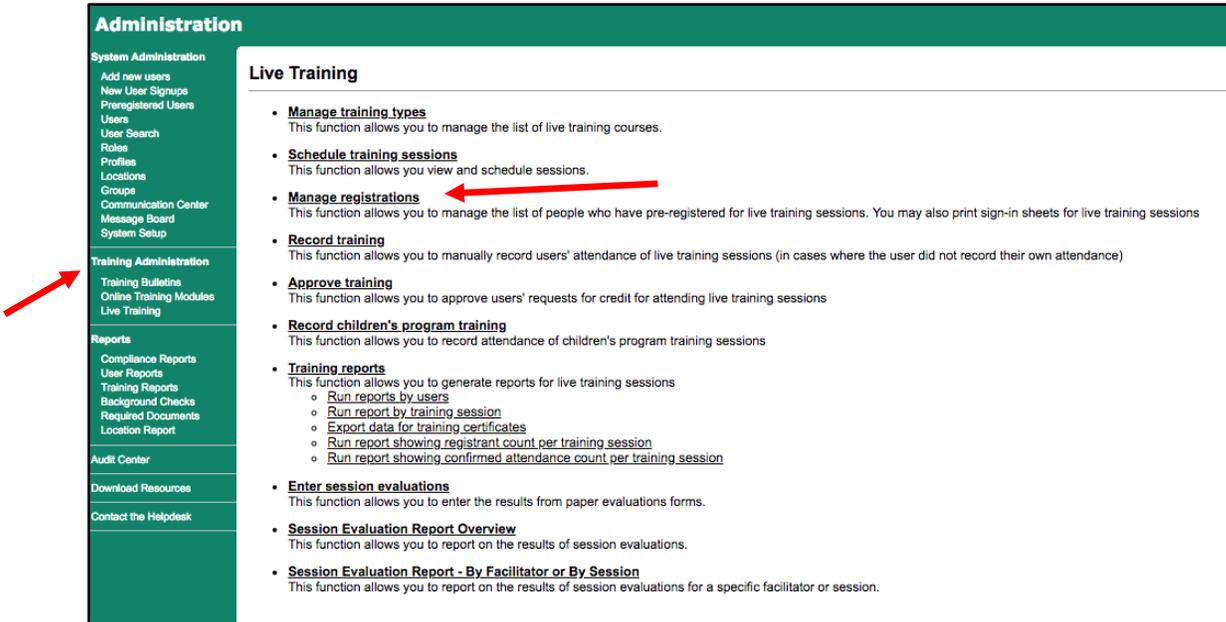
Date/Time	Location	Facilitator	Max size
06/10/2018 11:00 AM	St. Helen (Westfield)	Carolyn Colonna	20
05/09/2018 1:00 PM	Archdiocese of Newark Pastoral Center (Newark)	Karen Clark	12
04/28/2018 11:00 AM	Our Lady of Peace (New Providence)	Valerie Mitreuter	40
04/21/2018 12:00 PM	St. Paul the Apostle (Jersey City)	Vanessa DeVillava	18
04/21/2018 10:00 AM	St. Joseph (East Orange)	Karen Cavaness	25
04/20/2018 7:00 PM	St. Aloysius (Jersey City) <small>Session conducted in Spanish</small>	Jose Planas	60
04/19/2018 9:30 AM	Archdiocese of Newark Pastoral Center (Newark)	Karen Clark	12
04/13/2018 9:00 AM	Seton Hall University (South Orange)	Karen Clark	unlimited
03/22/2018 7:30 PM	Notre Dame (North Caldwell)	Mary Ellen Theel	15
03/22/2018 10:00 AM	Notre Dame (North Caldwell)	Mary Ellen Theel	15
03/22/2018 10:00 AM	St. John the Evangelist (Bergenfield)	Rosemarie Flood	20

If “Live Training” is selected, this screen is displayed: (screen only partially displayed)



# 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.”



The screenshot shows the 'Administration' sidebar on the left, with 'Live Training' selected under the 'Training Administration' section. A red arrow points to the 'Live Training' link. The main content area is titled 'Live Training' and contains a list of options. A red arrow points to the 'Manage registrations' option.

- Manage training types**  
This function allows you to manage the list of live training courses.
- Schedule training sessions**  
This function allows you view and schedule sessions.
- Manage registrations** ←  
This function allows you to manage the list of people who have pre-registered for live training sessions. You may also print sign-in sheets for live training sessions
- Record training**  
This function allows you to manually record users' attendance of live training sessions (in cases where the user did not record their own attendance)
- Approve training**  
This function allows you to approve users' requests for credit for attending live training sessions
- Record children's program training**  
This function allows you to record attendance of children's program training sessions
- Training reports**  
This function allows you to generate reports for live training sessions
  - Run reports by users
  - Run report by training session
  - Export data for training certificates
  - Run report showing registrant count per training session
  - Run report showing confirmed attendance count per training session
- Enter session evaluations**  
This function allows you to enter the results from paper evaluations forms.
- Session Evaluation Report Overview**  
This function allows you to report on the results of session evaluations.
- Session Evaluation Report - By Facilitator or By Session**  
This function allows you to report on the results of session evaluations for a specific facilitator or session.



The screenshot shows the 'Select A Session:' dropdown menu. The 'Past Sessions' are listed from 2018 to 2011. The selected session is '02/26/2018 1:00 PM - (Chancery at the Catholic Center - Kansas City) - Protecting God's Children for Adults'. A red arrow points to the dropdown menu. A callout box contains the text: 'Choose a session from the dropdown box and select "Continue."' Below the dropdown is a 'Continue' button.

**Select A Session:**

Upcoming sessions | Past Sessions: [2018](#) [2017](#) [2016](#) [2015](#) [2014](#) [2013](#) [2012](#) [2011](#) 2010

02/26/2018 1:00 PM - (Chancery at the Catholic Center - Kansas City) - Protecting God's Children for Adults

Continue

Choose a session from the dropdown box and select "Continue."

- Show Pre-registration/Attendance count by**

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

## ***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 Coordinator, and ask them to review the account to ensure that it is properly situated.

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