



---

# The Platform eCommerce Functionality

EXTERNAL ADMINISTRATOR GUIDE

---



# Contents

Log on to The Platform	4
Search for a Training Course	6
Checking Training Course Prerequisites	10
Book and Pay for Training	12
Assign Users to Training	18
Adding New Users	22

# Log on to The Platform

To log on to The Platform – <https://metrotrains.csod.com/>

**M METRO**

Welcome to The Platform  
Metro's Learning Management System | [Please Sign-in](#)

**Login**

Username:

Password:

[Forgot Username or Password?](#)

**LOGIN**

- 1 Enter your email address as your username.
- 2 Enter your password.
- 3 Click **Login** once you have entered your **Username & Password**.

**Booking & Payment**

Organisations and individuals can book training and pay in full online via Visa or MasterCard transaction by visiting <http://www.metrotrains.com.au/academy/>

If the learner or a duly authorised Company representative completing the course booking has requested language, literacy or numeracy (LLN) assistance Metro Trains Melbourne (MTM) will charge the Company and the Company agrees to pay to MTM a fee for additional LLN support that will be determined, at MTM's absolute discretion, based on participant numbers for the relevant course session.

MTM reserves the right to administer a LLN skills check at any time during the relevant course session to the learner and the learner must sit the LLN skills check without assistance. If the learner refuses to undertake the LLN skills check or does not meet the level required for the course being undertaken:

- the learner must remove him/herself from the course session and re-book a subsequent session nominating LLN assistance
- the Company agrees to forfeit and will not seek a refund of the full course fee that the Company must pay MTM upon enrolment to the course session prior to commencement

[Accept Terms & Conditions. Proceed with login.](#) [Decline Terms & Conditions. Log out.](#)

- 4 To log onto The Platform you must read and **accept the Terms and Conditions**.

If this is the first time you are logging in, you may be prompted to change your password. You may also need to change your password if it has expired. Go to the **next page** to learn how to change your password.

# Change password

Your password has expired. Please change your password.

The new password must match the following criteria:

- \* Passwords must contain both upper and lower case letters
- \* Passwords must contain alpha and numeric characters
- \* Passwords cannot have three or more consecutive characters the same
- \* Passwords cannot be the same as the previous 8 passwords
- \* Passwords must be 8 - 20 characters
- \* Passwords cannot have leading or trailing spaces
- \* Passwords cannot be the same as the Username, User ID or e-mail address.

Change your password

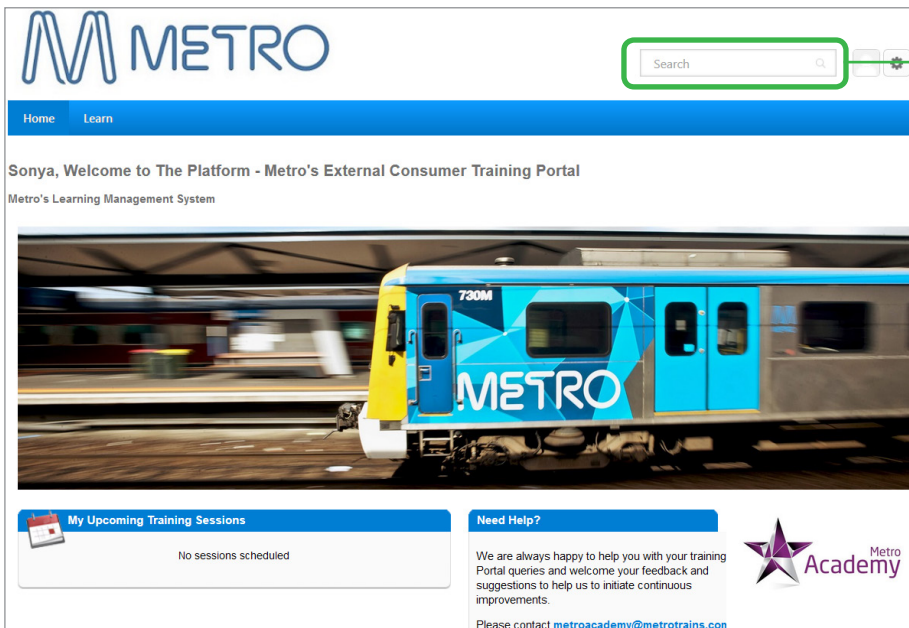
**Current password**

**New password**

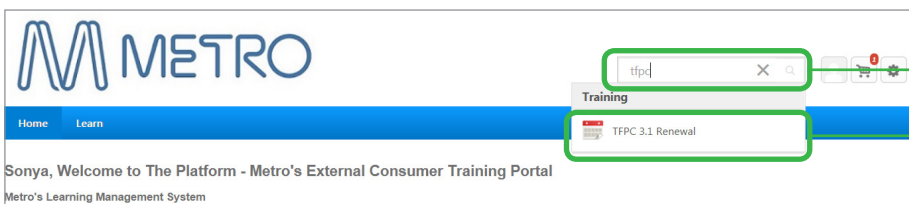
**Confirm password**

- 1 Read the password creation criteria.
- 2 Enter your current password / password provided.
- 3 Create a valid **new password**, that meets the password creation criteria.
- 4 Re-enter the created password for confirmation.
- 5 Click **Save** to complete.

# Search for a Training Course



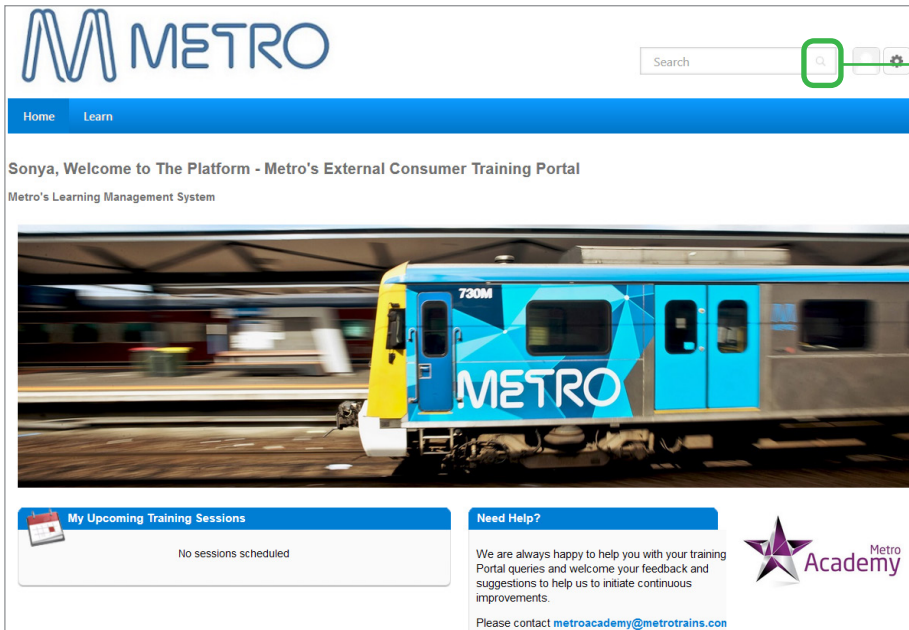
- 1 Locate the search bar (top right corner of Welcome page).



- 2 Type the course that you are looking for in the search bar.
- 3 The results are displayed under the search bar.

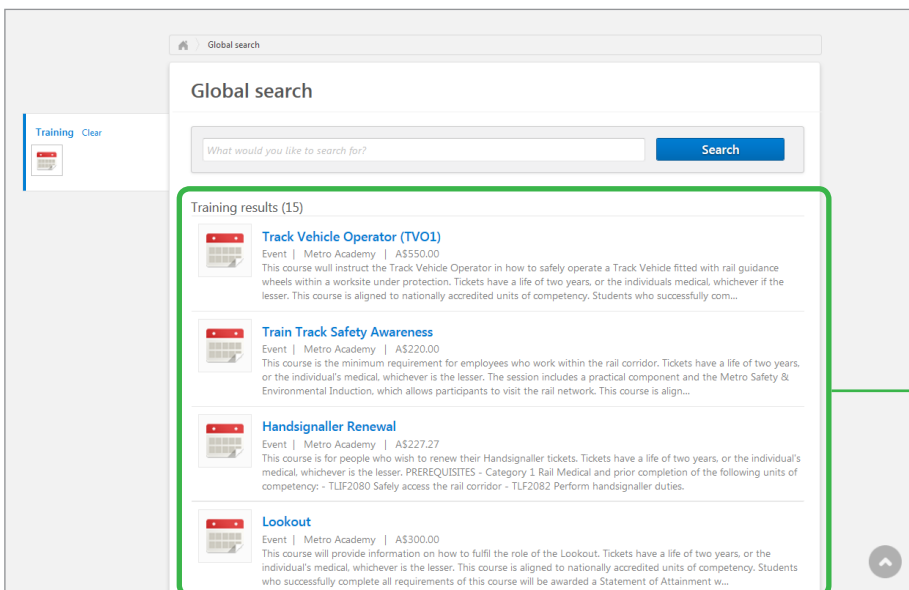
If you have selected a course using the above method, you can skip steps 4-8.

For a more detailed search, you can utilise the **Global search** function.



- 4 To access **Global search**, click on the **Search** icon located on the top right of the window.

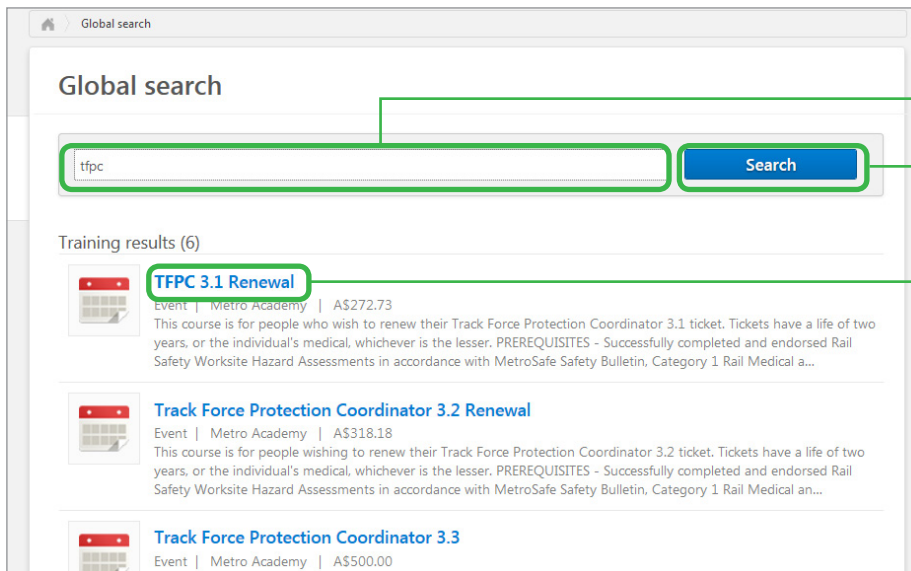
Training courses can be browsed for in the **Training results**, as shown in the below image. To search for a specific training course, go to step 6.



- 5 Training courses on offer will be displayed and can be viewed by scrolling down the page.

## Search for a Training Course

Skip the below steps if you have already selected a course.



6 Type the name of the course in the space provided.

7 Click on **search**.

8 Click on the **course title**.

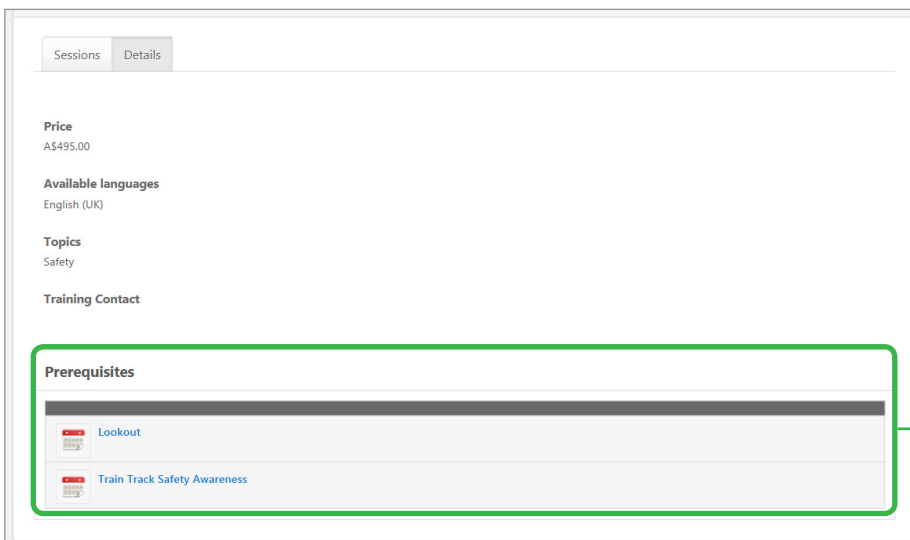
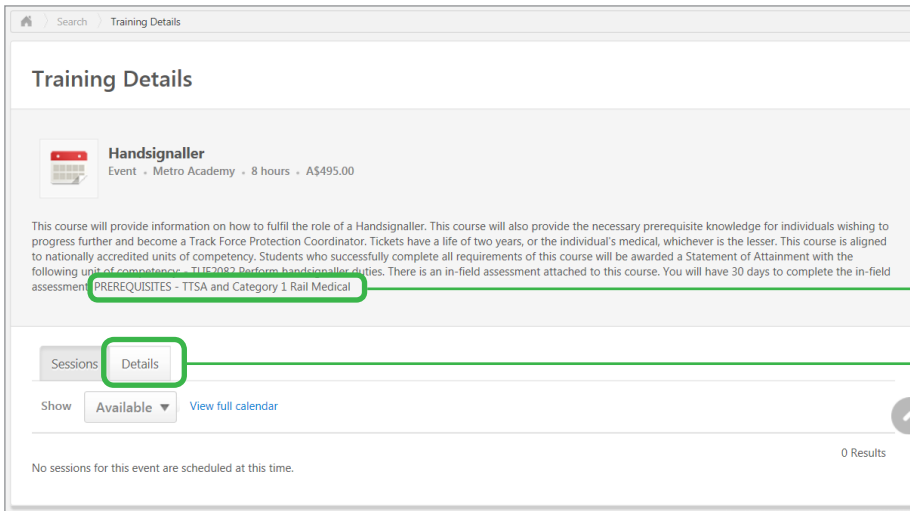
In the above example we searched for the course **TFPC 3.1 Renewal**, using the single keyword **tfpc**.





# Checking Training Course Prerequisites

Before booking and paying for training, confirm that all user/s meet the training course prerequisites. If prerequisites are not met by the user/s, they will be withdrawn from the course and an administration fee of \$40 per person, per course, will be charged.



**1** After searching for a training course, training prerequisites can be found on the **Training Details** page. The training prerequisites are displayed in the training description, under **PREREQUISITES**.

**2** For the majority of training courses, more information on prerequisites can be found by selecting the **Details** tab.

**3** If more information on prerequisites is available in the **Details** tab, this will display as per the image captured here.

Prerequisites can be selected by clicking a training course title. This will take you to the **Training Details** of the training course you have selected.

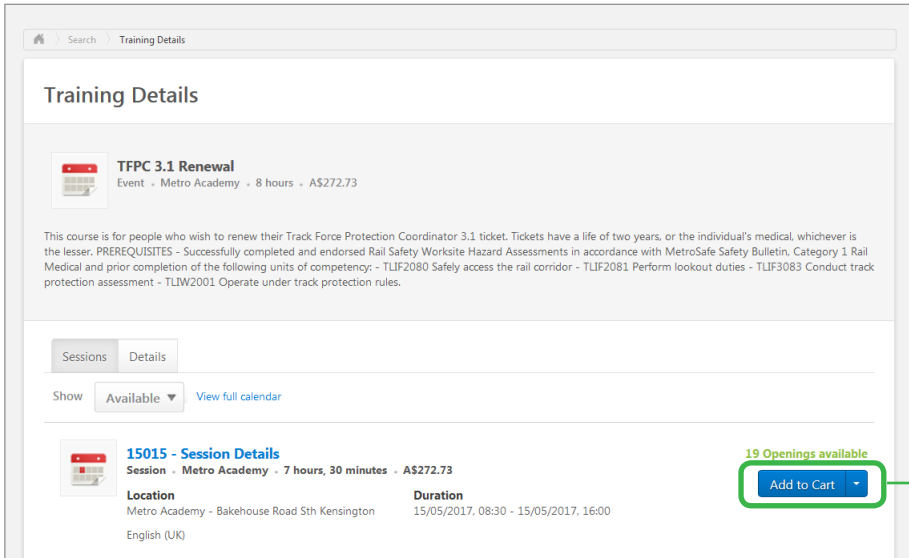
**Note** – Not all training courses will have prerequisites displayed in the **Details** tab.

If you don't see prerequisites in the **Details** tab, refer to **Step 1**.

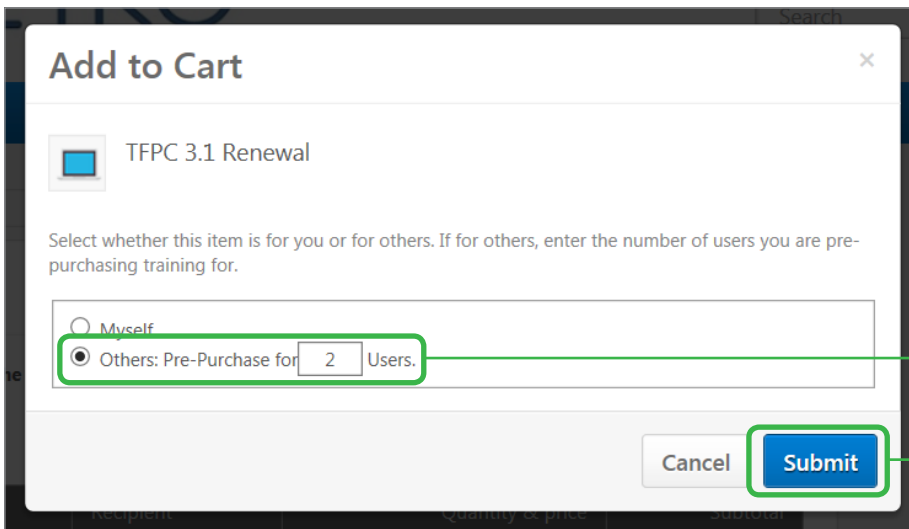


# Book and Pay for Training

Once training course/s have been selected and it has been confirmed that user/s meet the prerequisites, follow the below instructions to book and pay for the training.



1 Click **Add to Cart**, on the course for user/s to attend.




2 Select **Others:** and in the text box, insert the number of users you want to book for training.

3 Click on **Submit**.

Shopping Cart

Please ensure you meet all the PRE-REQUISITES for the training you are purchasing.

Title	Vendor	Recipient	Quantity & price	Subtotal
 TFPC 3.1 Renewal	Metro Academy	Blaine, Sonya	1 x A\$272.73	A\$272.73
Subtotal:				A\$272.73
Total:				A\$272.73

[Continue Shopping](#) [Proceed To Checkout](#)

Please ensure you meet ALL THE PRE-REQUISITES prior to purchase.

If you fail to meet the pre-requisites for this training you are likely to be withdrawn and charged a \$40.00 per person per course administration fee.

Please check all pre-requisites are met and current.

- 4 Select **Proceed To Checkout**, to continue with the purchase.

Select **Continue Shopping** if you want to purchase other training courses in the same transaction.

Shopping Cart Checkout

## Step 1 - Payment

Options ▾

If you fail to meet the pre-requisites for this training you are likely to be withdrawn and charged a \$40.00 per person per course administration fee.

Please ensure:

1. ALL details are correct
2. ALL pre-requisites are met

Select

Credit Card

pd

Credit Card ▾

### Purchase summary

TFPC 3.1 Res...	A\$545.46
<b>Subtotal</b>	<b>A\$545.46</b>

- 5 In the **Payment Method** dropdown, select **Credit Card**.

## Credit Card Information

VISA

CARD NUMBER

4111111111111111

EXPIRY DATE

02 2020

CVV CODE

411

- 6 Enter a 16 digit **Visa** or **MasterCard** number.

- 7 Enter the credit card expiry month (MM) and year (YYYY).

Then enter the CVV code (last 3 digits on the back of card).

**Credit Verification Value (CVV) code** protects the safety of funds when making purchases via the internet. The CVV code helps prove the actual physical card is present and the card account is legitimate.

### Invoicing Address

Your invoicing information should appear as it does on your credit card statement.

\* Required Field

**E-mail \***

**First Name \***  **Last Name \***

**Address Line 1 \***  **Address Line 2**

- 8 Enter the **e-mail address** for the invoice.
- 9 Enter your **First Name** and **Last Name**.
- 10 In **Address Line 1**, enter the **street number** and **name** for your **company**.  
In **Address Line 2**, enter the **suburb** your **company** is located in.

**City \***

- 11 Enter the **City** your **company** is located in.

**Country \***

- 12 Click the **Select** button under **Country**.

- 13 Use the textbox to filter for the country location of your company.
- 14 Click on the country from the dropdown.

**County/Province**  **Post Code \***

- 15 Leave **County/Province** blank and enter your **Post Code**.

### Additional Information

**Purchaser Street Address \***  
700 Collins St

**Purchaser Suburb \***  
Docklands

**Purchaser State \***  
Victoria

**Purchaser Post Code \***  
3008

**16** In **Additional Information**, re-enter the address details.

[Back](#) [Next](#)

**17** Click **Next** once you have completed inputting the details.

Shopping Cart Checkout

### Step 2 - Review

Please ensure ALL details you have entered are correct before completing your purchase.

Please ensure you meet ALL THE PRE-REQUISITES

If you fail to meet the pre-requisites for this training you are likely to be withdrawn and charged a \$40.00 per person per course administration fee.

Payment  Review  Confirmation

Title	Quantity & price	Subtotal
TFPC 3.1 Renewal	1 x A\$272.73 Tax (10.00%):	A\$272.73 A\$27.27
	Subtotal:	A\$272.73
	Total tax:	A\$27.27
<b>Total:</b>		<b>A\$300.00</b>

[Back](#) [Place Order](#)

Need to make changes?  
[Edit shopping cart](#)

**Payment Method**  
Credit Card  
VISA xxxxx-xxxx-xxxx-1111  
[Change](#)

**Invoicing Information**  
Sonya Blaine  
sonya.blaine@mortacomrad.com.au  
700 Collins st  
Melbourne, 3008  
Australia  
[Change](#)

**18** Review the purchase and click **Place Order**.

Click **Back** to make changes to the order.



### Step 3 - Confirmation Options ▾

**Purchase confirmation for 4949940917666264503012**

Thank you for completing your training purchase with Metro Academy.

A confirmation receipt will be emailed to you.

We look forward to seeing you at the course.

**18** Confirmation of purchase will be displayed if the purchase is successful.

Upon confirmation two e-mails will be sent to the invoiced e-mail address. One e-mail will confirm the training course information. The other e-mail will confirm the training purchased (tax invoice).

**Subject:** Metro Trains - Training Course Information

Dear Sonya Blaine

Please find below details of your recent training purchase with Metro Trains.

**Title:**  
TFPC 3.1 Renewal

**Start Date:**  
23/05/2017 - 23/05/2017

**Time:**  
08:30 - 16:00

**Venue:**  
Metro Academy - Bakehouse Road 5th Kensington

Please read the course details to ensure you comply with any safety clothing requirements.

**Subject:** Confirmation of Training Purchase

**TAX INVOICE**  
ABN 43 136 429 948

Sonya Blaine  
700 Collins St  
Docklands  
Victoria  
3008

Invoice Number: 4949940917666264503012  
Invoice Date: 17/05/2017 14:08:12

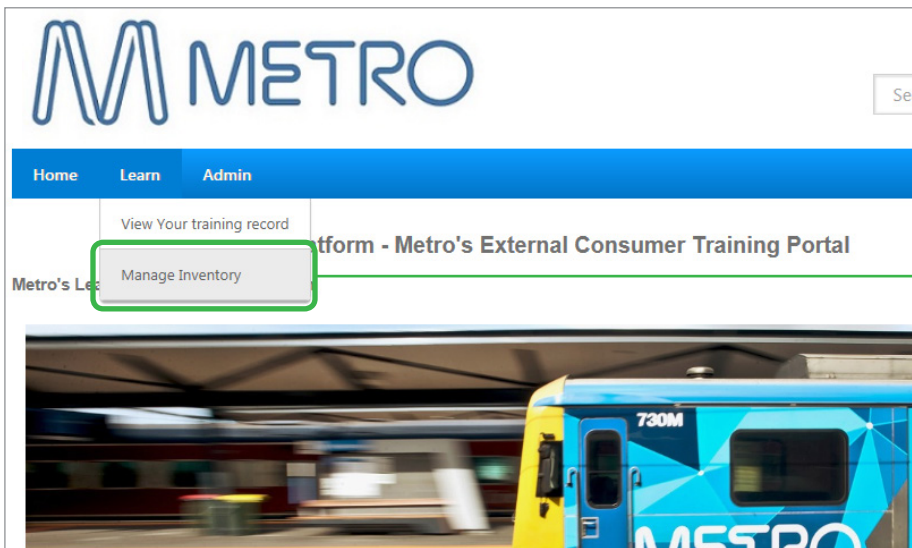
Item	Vendor	Quantity	Unit Price	Unit	Subtotal
TFPC 3.1 Renewal	Metro Academy	1	A\$272.73		A\$272.73
<b>Subtotal:</b>					A\$272.73
<b>Sales tax:</b>					A\$27.27
<b>Total:</b>					A\$300.00

(GST\* Sales Tax)

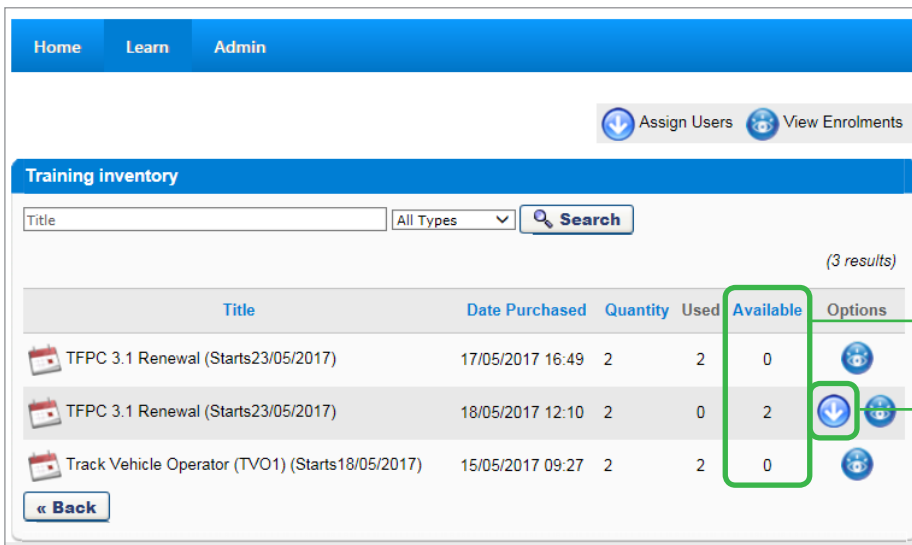
METRO TRAINING MELBOURNE  
PO BOX 12288 ARBONNETT  
STREET  
MELBOURNE VIC AUSTRALIA 3001

Telephone: +61 3 9019 7100  
www.metrotrains.com.au

# Assign Users to Training



- 1 Under the **Learn** tab, select **Manage Inventory**.



- 2 The **Available** column shows you the number of places you still have available for each course.

- 3 Click on the arrow for the course you want to register users into.

Home Learn Admin

### Assign Training

"Total Inventory Available" count includes Proxy Enrolment Requests started, but which may not be reflected immediately in the Inventory Management home page count.

First Name  Last Name

Select OU Criteria

Total Inventory Available : 2  
Inventory to be Assigned : 2  
(3 results)

#### ASSIGN TRAINING

Due date:   Optional. Entering a Due Date will trigger reminder e-mails for learners who have not completed the course.

<input type="checkbox"/> Name	OU
<input checked="" type="checkbox"/> Fay, Tina	VicTrack (Primary OU)
<input checked="" type="checkbox"/> Gage, John	VicTrack (Primary OU)
<input type="checkbox"/> Smith, Edward	VicTrack (Primary OU)

4 Tick the **Name** checkbox/s of the users you want assigned to training.

5 Click on **Submit**. This will take you back to the **Training inventory** page.

METRO

Home Learn Admin

### Training inventory





Title  All Types

(3 results)

Title	Date Purchased	Quantity	Used	Available	Options
TFPC 3.1 Renewal (Starts23/05/2017)	17/05/2017 16:49	2	2	0	<input type="button" value="Options"/>
TFPC 3.1 Renewal (Starts23/05/2017)	18/05/2017 12:10	2	2	0	<input type="button" value="Options"/>
Track Vehicle Operator (TVO1) (Starts18/05/2017)	15/05/2017 09:27	2	2	0	<input type="button" value="Options"/>

6 To confirm users have been assigned to training, click the **Options** icon.

The screenshot displays the METRO system interface. At the top left is the METRO logo. To its right is a search bar. Below the logo is a navigation menu with 'Home', 'Learn', and 'Admin' options. The main content area is titled 'Training Details' and includes a search bar, a 'Printable Version' link, and pagination controls showing '1-2 of 2'. Below this is a table titled 'Assigned Users' with columns for 'EMPLOYEE NAME', 'REGISTERED', 'DUE DATE', and 'OPTIONS'. The table lists two users: Tina Fay and John Gage, both registered on 18/05/2017 at 16:03. A green box highlights the 'EMPLOYEE NAME' column, and a green line connects it to the explanatory text on the right. A '« Back' button is located at the bottom left of the table area.

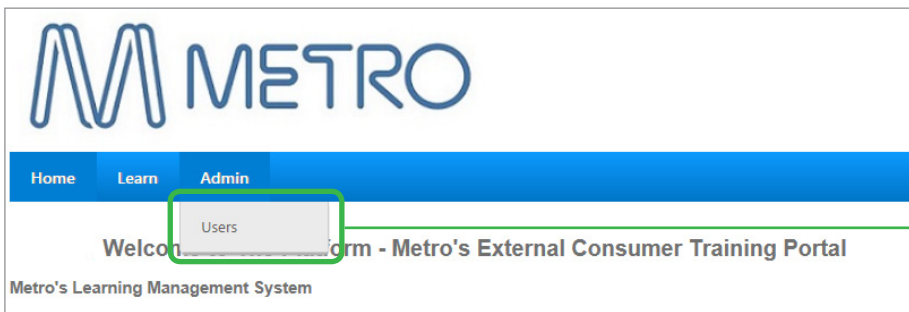
EMPLOYEE NAME	REGISTERED	DUE DATE	OPTIONS
Tina Fay	18/05/2017 16:03		 
John Gage	18/05/2017 16:03		 

- 7 Under **EMPLOYEE NAME**, you will see names of the users assigned to the training course.

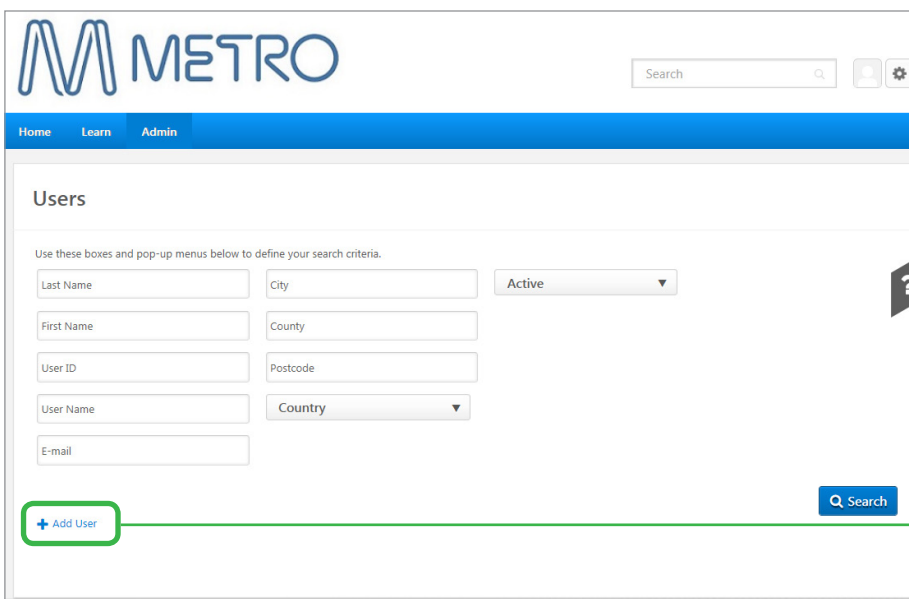


# Adding New Users

To assign training to individuals in your organisation, they need to be included in the system as users.



- 1 Under the **Admin** tab, click on **Users**.



- 2 Click on **Add User**.

Home Learn Admin

Users

### Add new user

Title:

First Name: \*

Middle Name:

Last Name: \*

Suffix:

User Name: \*

User ID:

- 3 Add the user's first name in the **First Name:** field.
- 4 Add the user's last name in the **Last Name:** field.
- 5 In **User Name:** field enter the user's e-mail address.

Contact

Address Line 1:

Address Line 2:

City:

County:

Postcode:

Country:

Phone:

E-mail Address:

- 6 In **E-mail Address:** field re-enter the user's e-mail address.

**Note:** User's e-mail address must be entered in the E-mail Address: field, for the user to receive e-mail notifications.

Organisation Structure

Depot Manager:

Position:

Self Registration Group:

Company:

Division:

Section:

SubSubsection:

Primary OU: \*

Location:

Medical Category:

Department:

Group:

Subsection:

- 7 Click on the expand icon for **Primary OU** (Primary Organisation Unit, which is your organisations name).

Select Primary OU

Search

Title	ID
VicTrack	VICTRAK EXE

Cancel

8 Click the **Title** (In this example, it is VicTrack).

Organisation Structure

Depot Manager: [ ] [ ]

Position: [ ] [ ]

Self Registration Group: [ ] [ ]

Company: [ ] [ ]

Division: [ ] [ ]

Section: [ ] [ ]

SubSubsection: [ ] [ ]

Primary OU: \* VicTrack (VICTRAK EXE) [x]

Location: [ ] [ ]

Medical Category: [ ] [ ]

Department: [ ] [ ]

Group: [ ] [ ]

Subsection: [ ] [ ]

9 Click the expand icon for **Self Registration Group**.

Select Self Registration Group

Search

Title	ID
External Consumer	EX-0001

Cancel

10 Click the **Title** named **External Consumer**.

Organisation Structure

Depot Manager: [ ] [ ]

Position: [ ] [ ]

Self Registration Group: External Consumer (EX-0001) [x]

Company: [ ] [ ]

Division: [ ] [ ]

Section: [ ] [ ]

SubSubsection: [ ] [ ]

Primary OU: \* VicTrack (VICTRAK EXE) [x]

Location: [ ] [ ]

Medical Category: [ ] [ ]

Department: [ ] [ ]

Group: [ ] [ ]

Subsection: [ ] [ ]

Cancel Save

11 Click on **Save**.



### Change password

The new password must match the following criteria:

- \* Passwords must contain both upper and lower case letters
- \* Passwords must contain alpha and numeric characters
- \* Passwords cannot have three or more consecutive characters the same
- \* Passwords cannot be the same as the previous 8 passwords
- \* Passwords must be 8 - 20 characters
- \* Passwords cannot have leading or trailing spaces
- \* Passwords cannot be the same as the Username, User ID or e-mail address.

Change Password for John Gage

New password

Confirm password

12 Read the password creation criteria.

13 Create a valid **New password**.

14 Re-enter the created password for confirmation.

15 Click **Save** to complete.

To confirm a **new user** has been **added**, follow the below step.

### Users

Use these boxes and pop-up menus below to define your search criteria.

City

County

User ID  Postcode

User Name  Country

E-mail

[+ Add User](#)

**Search Results**

User	User Name	User ID	Status	Identifier	Options
Gage, John	jgage@mmccom.au		Active	Vietrack (Primary OU)	

(1 result)

16 Enter the user's **Last Name** and **First Name** in the fields provided.

17 Click **Search**.

18 If the user has been created successfully, the user's name will show in the **Search Results**.

 METRO

