MuniEd ro®

A free service of the MSRB

Course Administrator Quick Reference Guide

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MuniEdPro[®] is a suite of interactive, online courses designed specifically for municipal market participants. The courses, offered by the Municipal Securities Rulemaking Board (MSRB), provide content relevant to municipal market activities and regulations. Each MuniEdPro[®] course allows the learner to apply MSRB rules to real-world scenarios. Courses are available individually or through two access options, bulk or enterprise, depending on the needs of the firm.

Firms seeking a bulk access must designate a course administrator to provide employees with access to MuniEdPro[®] courses. This document serves as a quick reference guide for course administrators.





Adding Learners



Course administrators will provide information on eLearners to the MSRB by submitting a bulk access course request form. The MSRB will create MuniEdPro[®] accounts for eLearners based on the bulk access course request form.

Fields required to complete the bulk load template:

- Enter the eLearner's last name.
- . Enter the eLearner's first name.
- Enter the eLearner's email address. This will be their MuniEdPro[®] user name.
- Enter the firm name.
- Enter the firm's MSRB ID, if known or applicable (optional).
- Select the eLearner's professional function.
- Enter the eLearner's job title.
- Enter the eLearner's business telephone number.
- Enter the firm's business address.
- Select applicable range.
- Select applicable range.

Note: All eLearners will be loaded into MuniEdPro[®] with a temporary password which will be provided to the course administrator. Course administrators will be responsible for providing the temporary password to all eLearners. Each eLearner will be required to change his/her temporary password and select a security question upon initial login.



Bulk Course Selection





Browse Courses

• From the menu bar, hover over "Courses", click "Browse Courses."

Select Courses

Click course title.

- Note: The following information is displayed for your review: Course Description, Subjects.
- One of these options will be displayed: "Add to Cart,""Launch" or "Assign."
- Click "Launch" to start the course.
- Click "Assign" to assign the course.



Bulk Course Selection

rainir	g Details
	Continuing Disclosure Obligations Online Class - Municipal Securities Rulemaking Board - 50 minutes - \$0.00
	Launch Assign
the end of uance of m id; 3) Differe	his course, learners will be able to: 1) Identify the ongoing disclosure requirements for filing financial information and event notices with respect to the micipal securities under Securities and Exchange Commission Rule 15c2-12; 2) Understand the continuing disclosure requirements under federal securities law, ntiate continuing disclosure obligations of underwriters and issuers.
Price	
Price \$0.00	
Price \$0.00 Credits	
Price \$0.00 Credits 2	
Price \$0.00 Credits 2 Available	anguages
Price \$0.00 Credits 2 Available English (US)	anguages
Price \$0.00 Credits 2 Available English (US) Subjects	anguages

- These options will be displayed:
 "Launch" or "Assign."
- Click "Launch" to start the course.
- Click "Assign" to assign the course.



Assign Courses

My Profile Courses Repor	rts Manage Vendor Content Admin Integration Suite Help About		
Welcome	to MuniEdPro ^s	OPTION 3	
The Municipal Sect suite of high-quality, up-to-date education	urities Rulemaking Board (MSRB) offers this e-learning courses to provide relevant and nal content for municipal market participants.	• Click "Browse Courses."	
@2016 Municipal Securities R	Nurmaking Boxed [MSR0 Support 202458-130] MSR8 Support@msth.org	Enter the course title or leave blank to view	Assign Training
		all courses	Applying MSRB Rules in Relation to Market Risk Online Class + Municipal Securities Rulemaking Board + \$45.00
FEATURED (The Decision Roles and Re in Fixed Rate	to Borrow Isponsibilities of Market Participants Primary Market Offerings Browse Courses My Courses	 Click "Search." 	Due Date m
Rules and Ris Applying MSF	sks RB Rules in Relation to Market Risk Pending Evaluations	• Click "Assign."	Add a Comment
		. If assigning a due date click calendar to	
My Profile Courses Repor	rts Manage Vendor Content Admin Integration Suite Help About	select the due date (ontional)	Direct Subordinates Language Equivalency Assignment History Current Status Include Subordinates
		Select the due date (optional)	John Doe 1 Approved
	🕷 👌 Global Search		
	Global Search	Check the box to "Automatically register users."	Select an Indirect Subordinate 📴 Select a User from a Cost Center I Ap 📴
Training			Indirect Subordinates Language Equivalency Assignment History Current Status
	Appl Search Training	Check box next to eLearner name	Concel Submit
	Applying MSRB Rules in Relation to Municipal Market Risks		Carlet Summe
	The Decision to Borrow: Roles and Responsibilities of Market Participants in Fix	Click "Submit"	
	Refine search	• CICK Submit.	
Applying MSRE Online Class - Munic	Rules in Relation to Municipal Market Risks cipal Securities Rulemaking Board - 50 minutes - \$0.00		
Launch Re	equest Assign		

At the end of the course the learner will be able to (1) Identify characteristics of different interest rate environments; (2) Determine the types of risks associated with different interest rate environments and the effect of interest rate environments on various bype of fixed rate bonds; (3) Determine the price/yield relationship for bonds in different types of interest rate environments; and (4) Apply the MSB's rules associated with certain municipal securities transactions.



Remove Course Assignment

My Profile Co	purses Reports A	
View Your Transcrip	pt ping Cart > Checkou	• Hover over the "My Profile" tab.
User Profile Manage Inventory	View Your Transcript	 Select "View Your Transcript."
Welcome		• Click dropdown beside "My Organization" button.
	A John Doe Transcript: John Doe	Select individuals by:
John Doe	Transcript: John Doe My Organization • Options • From this page, you can view all current and completed course(s). Search John Doe	1. Typing eLearner's name in search field and clicking "Search"
Actions	Active * By fitte * All Types * Search Results (5) Image: Search Results (5) Uniform Practices (Expires 7/20/2016) Image: Search Results (5) Due: No Due Date: Status: In Progress Image: Search Results (5)	2. Scrolling and/or paging through the list of eLearners to select an eLearner by clicking on their name.
John Doe	M John Dee Transcript: John Dee Transcript: John Doe My Organization Options	• For the course to be removed, click dropdown arrow next to "View Training" blue button beside the title of the course.
User Profile	From this page, you can view all current and completed course(s). Active • By Title • All Types • Search for training Q. Search Results (2) Image: Applying MSRB Rules in Relation to Market Risk - SCORM T Due: 7/81/2016 Status: Registered / Past Due	• Select "Remove."
	Applying MSRB Rules in Relation to Market Risk Due: No Due Date Status: Approved Remove View Training Details	



English (US)

Q Search

Display :
 All Training
 Assigned Training

Options : 🗹 Hide Archived Training 🗌 Include Indirect Subordinates

ed Training : 🗌 Include training that was removed from user transcript

User Transcript Reports

	Search	a 🛛 🖨
My Profile Courses Reports Admin Help About Standard Reports		
Welcome to MuniEdPro® This suite of high-quality e-learning courses, created by the Municipal Securities Rulemaking Board (MSRB), provides relevant and up-ho- and exclamation content for professionals actively engaged in municipal markets activities. You can search our courses by role or category.		
eports ick on a report category to view those reports. You may search for any reports by title or description.		
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Inack Employees Billing	Training Progress Re Chart Displays a sectoral summer of subordneter training progress.	
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We begin Yes Date Start Register methylers part due taming Yes Register Start We attract approved, deferred, or denned. You mey change your declarer for taming that an employee has not yet system Core. Prefine Request Register Start Mark Start Mark and employees. Prefine Request Training Status Summary	Training Progress Pie Chart Durbys a pie chart kummary of solocificates' taking progress. Training States Summary Deglays a surrary of how marky taking terms each employee has that are not stated, in progress, or competied. Training Data States Summary Deglays transcripts of employees for whom you are the approver, manager, or cost center approver.	
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- $\cdot\,$ $\bullet\,$ Hover over the Reports tab in the blue menu bar at the top.
- Select "Standard Reports" from the drop-down menu.
- Select "Training Status Summary" to run a Training Status Summary report on your team's transcript.
- _ Click the "Search" button
- The report will generate and list all of the courses that are currently Registered, In Progress and Complete for your organization
- Click the "Export to Excel" link if you would like to export the report to Excel







Pop - Up Blocker

If course does not launch immediately, please check your pop-up blocker. Browsers manage pop-up blockers differently. MuniEdPro[®] is configured to open some items in separate windows. Please work with your IT support to disable pop-up blockers or add MuniEdPro[®] (https://www.msrb.csod.com) to your firm's whitelist.



System Help

Online help is available for using the MuniEdPro[®] system. Hover over the **O** (options icon) on the far right above the menu bar and click "Help."



Support For further assistance, please contact MSRB Support. Email MSRBSupport@msrb.org Telephone 202-838-1330





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