Training Record Management System

Feature Instructions

Training Record Management System:
Feature Instructions

Welcome to this tutorial on the Training Record Management System. This feature makes it possible to:

- Manage online, classroom, and third-party training records
- Create a training matrix that specifies mandatory, recommended, and location-specific training for different company roles
- Quickly identify training that has not yet been completed
- Designate approved courses and training providers

Using the Training Record Management System

The Training Record Management System must be enabled before using it for the first time. To do this:

1. Click the **Admin** tab, then click the **Setup** icon. Note: Users with the Senior Client Admin user role must first select a company by clicking Companies on the Admin tab, then clicking **Edit** next to the desired company.
2. Scroll down to the Optional Features section, then toggle Training Record Management System to **ON**. To access additional options for this feature, click the drop-down arrow. More details about these options will be provided later in this tutorial.
3. Lastly, click **Save**.

Once the feature is enabled, it can be accessed on the Admin tab by clicking the **Training Record Management** icon. If administering more than one company, when clicking the icon, select a company from the drop-down menu at the top of the Training Records page to view the Training Record Management System for that particular company.

Adding Users

Training records can only be added to users who exist in the system. To add a user:

1. Click the **Manage Users** tab.
2. Click the number under the Users column next to the location where the user should be added (if no users have been added yet, the number will be zero).
3. Click **Add User**.
4. Fill out as much of the form as possible. At a minimum, all required fields must be entered. Note that the default user role is Learner. Although it may not be required in the form, a unique user ID should be entered, as it is required later to add the user's training records.
5. Click **Add** once all information has been entered.

6. A new page will display the information entered for the user. Click **Add Courses** to add courses to the user's account. Once all information has been entered and any courses have been added, click **Submit** to create the account.

If many users need to be added at the same time, their information can be entered into the supplied Excel template and uploaded to the system. To use the template:

1. Click the **Manage Users** tab.
2. Click **Upload Users** at the bottom of the page.
3. Click **User Template**.
4. Save a copy of the template ensuring that the file format is not changed.
5. Open the template, then carefully fill in information for each user according to the template instructions that can be viewed on the same page as the template.
6. When finished, save the completed template ensuring that the file format is not changed.
7. Click the file selection button and select the file to upload; or, alternatively, drag and drop the file onto the file selection button. Select the completed template, then click **Upload** in the system to add the users.

Once users have been added to the system, the Training Record Management System is ready to be used. The Training Record Management System comprises three main tabs: Training Records, Training Matrix, and Training Providers.

The Training Records Tab

The Training Records tab enables training records to be accessed and interacted with. The Training Records tab is the page in the Training Record Management System that can be used to:

- View, add, approve, deny, edit, and delete training records
- Upload certificates for completed courses
- Download an Excel file containing all training records
- Access an exception report showing training records that have not yet been added because of incorrect or missing data

Viewing Records

A list of all existing training records can be viewed at any time by clicking the Training Records tab. To help organize this data, the list can be sorted by any column.

- To filter the list by certain search criteria, enter the criteria in the field provided, then click **Search**. To return to the complete list of all records, click **Reset**.
- If there are several pages of records, a specific page can be viewed by using the record navigation bar, or by selecting a page from the "Go To:" drop-down menu.

Any records that include uploaded certificates will appear with a gold medallion in the Certificate column. If a record's expiry date has passed, or will occur within the next 90 days, the expiry date will be displayed in coloured text.

Adding Records

Training records can be added to the system one at a time, or they can be uploaded *en masse* using the supplied Excel template.

Adding a Single Record

To add a single training record on the Training Records tab, click **Add Record**. There are three required fields: User ID, Course ID, and Completion Date.

- Start entering the user's name in the Full Name field. A list of users will be displayed, followed by their location and User ID, if provided. If the user has an User ID, click on his or her name to automatically fill the Full Name and User ID fields. Otherwise, a User ID must be entered in the user's account. To do this:
    1. Click **Search** in the main navigation menu.
    2. Enter the user's name in the Search Criteria field, then click **Search**.
    3. Find the user in the list of search results, then click **Edit** beside his or her name.
    4. In the Company Information section, enter the user's ID.
    5. Click **Save**.
    6. Return to the Training Record Management System, and click **Add Record** to continue.
- Once the Full Name and User ID fields are filled in, start entering the course title in the associated field. Click on the appropriate title from the list that appears. The Course ID will be filled in automatically. If no matching course title is displayed, the course must first be added to the system. Refer to the Adding Courses to a Training Provider section of this tutorial, for further details.
- To enter the Completion Date, click inside of the field, then choose the date from the pop-up calendar, or manually enter it using DD/MM/YYYY formatting.

If the course mark is known, enter it in the provided field as a percentage without the percent sign. If a certificate is available as a .pdf, .jpg, or .png file less than 4 MB, it can be uploaded to the system by clicking **Upload**, then selecting the appropriate file.

Once all information has been entered, click **Submit** to add the record.

Training records can also be uploaded to a user account on his or her account page. To upload records this way:

1. Click **Search** in the main navigation menu.
2. Enter the user's name in the Search Criteria field, then click **Search**.
3. Find the user in the list of search results, then click **Edit** beside his or her name.

4. Scroll down the user account page to just below the Company Information section, then click **Add Training Record**.
5. Enter as much information as possible, ensuring that all required fields are completed. There are four required fields: Training Provider, Completion Date, Course ID, and Format. Note that if the Course ID is the first field to be entered, the course title, and training provider fields will be filled in automatically.
6. If a certificate is available, you can add it to the record by clicking **Upload**, then selecting the appropriate certificate from your files.
7. Once all required information is entered and any applicable certificate is uploaded, click **Submit**.

Adding Multiple Records

More than one record can be added at the same time using the supplied Multi-Record Uploader Excel template. To upload multiple records:

1. Click **Upload Records** to access the template, along with instructions detailing how to use it.
2. Save the template, ensuring that its file format is not changed.
3. Fill out the template by following the instructions provided.
4. When ready, click **Upload**.
5. Click **Agree** to accept the verification statement.
6. Select the saved file from the dialog box, then upload the file.

Note that if Automatic Completion is toggled **ON** under the Training Record Management System option on the Company Setup page, then any online course or exam in a user's account will be automatically moved under the Completed Training header when a matching training record is uploaded for it.

Multiple records can also be uploaded through a user's account page. To upload multiple records this way:

1. Click **Search** in the main navigation menu.
2. Enter the user's name in the Search Criteria field, then click **Search**.
3. Find the user in the list of search results, then click **Edit** beside his or her name.
4. Scroll down the user account page to just below the Company Information section, then click **Add Training Record**.
5. Click **Add Multiple Records** to reveal the multi-record uploader table.

   The first row of the table contains the column headers. The second row of the table displays a record that already has the Last Name and First Name cells filled in. If a User ID and email address have been entered in the user's account, they will appear under the corresponding columns in the table.

6. Enter a course ID, completion date, and, if available, a mark; then click the plus sign in the Action column to add another row for a new record.

Multiple records can be added at the same time by copying and pasting data from an Excel spreadsheet. In the spreadsheet, create a row of data for each training record. Each row should contain a maximum of three columns in the following order: course ID, completion date, and, if available, mark. When entering data, ensure the course IDs are correct and the completion dates are in DD/MM/YYYY format. Once the spreadsheet is filled out, copy its data, click the Course ID cell in the last record displayed in the user's account, and paste the spreadsheet data into the cell. New rows will be added containing the Excel spreadsheet's data.

To delete a row of data, click the corresponding minus sign in the Action column.

7. When the information for all required records have been entered, click **Submit All**.

   If all data was entered correctly and formatted properly, a message under the Add a Training Record section will state that the training records have been successfully added. These records will appear under the Completed Training header in the user's account and in the Training Record Management System itself. Any records that were not added due to errors will be displayed, and the fields that need corrections will be highlighted in red. Once the data is revised, click **Submit All** to re-submit the records.

- To add a copy of a certificate to a record that has been added, scroll down to the Completed Training header in the user's account, click **Upload** next to the completed course, then select the certificate from your files. Note that it is also possible to drag and drop a certificate .jpg, .png, or .pdf image file over the Upload button to instantly upload a certificate to that record.
- If many certificates have been scanned into one document—for example, if an employee provides a copy of eight wallet cards in one image file—the file can be uploaded for each record. Additionally, the image file can be uploaded into the Documents section of the user's account. To do this, click the down arrow for the Documents section, then click the upload arrow and select the file, or simply drag and drop the file over the arrow. It is best, if possible, to avoid storing multiple certificates in one file, as it does not allow employees to access their certificates individually.

Exception Report

Before being added to the system, all training records are automatically checked to ensure required fields are completed and that all specific formatting rules have been followed. If required data is missing or formatting rules were not followed when records are entered individually or en masse through a user's account page, a message will indicate which fields require updating before the records can be added to the Training Record Management System.

If records uploaded through the Training Records tab or via the Multi-Record Uploader template are missing required information, do not follow formatting rules, or do not match the data in a user's account, an exception report will display the records that could not be added. The reason why each record could not be added will be displayed in the Issue Type column.

Records on the exception report can be revised and added to the system, or they can be discarded. To revise a record on the exception report:

1. Note the issues identified in the Issue Type column. If the column is too narrow to display multiple issues, hover the mouse over the issues to view them in a pop-up list.
2. Click **Edit**.
3. Fix the identified issues.
4. Click **Save**.

To fix multiple records at once, you can upload corrected versions of the exception records using the Multi-Record Uploader. Refer to the Multi-Record Uploader template instructions for details on how to use the uploader.

To discard a record on the exception report, click **Delete** beside it. To delete all records on the exception report, click **Purge All**. A confirmation dialog box will appear to prevent accidental deletion.

The list of records on the exception report can be viewed at any time by clicking **Exception Report** on the Training Records tab.

Approving Records

Users can upload their own training records from their account when they complete required or recommended classroom or third-party training courses.

When users upload training records from their own accounts, the courses appear greyed out at the top of the list of training records on the Training Records tab and under the Completed Training header on the users' account page (with a pending status). Any training topics that the courses are linked to will remain under the appropriate header on the users' account page: required or recommended training.

The person whose email address is entered in the Company Information section of the Company Setup page (usually a manager or administrator) will receive an email requesting approval for these records in order to add them to the training record management system. There are two ways for that person to approve training records:

1. Click **Approve** in the body of the email, or
2. Click **Approve** next to the record on the Training Records tab in the Training Record Management System.

Once approved, the record will no longer be greyed out in the list of training records on the Training Records tab. On the user's account page, the training topic the course is linked to will be removed from under the Required or Recommended Training header (whichever is applicable) and the course will appear in black text under the Completed Training header with its status updated to Completed.

Denying Records

To deny training records:

1. Click **Deny** in the body of the email.
2. Click **Deny** next to the record in the Training Record Management System.

If a record is denied, it will be deleted from the Training Records tab, removed from the Completed Training section on the user's account page, and the user will be notified via email that the record they submitted was denied.

Editing Records

To edit a training record:

1. Click **Edit** next to the record to be changed.
2. Make any desired changes to the fields.
3. If a certificate has not yet been added, click **Upload**, click the file selection button, then select a certificate to upload. If a certificate has already been uploaded, click **Replace** to upload a different one, or click **Delete** to remove the existing certificate.
4. Click **Save**.

If the only edit required is to upload a certificate:

1. Click **Upload** beside the appropriate record on the Training Records tab.
2. Click the file selection button.
3. Click **Upload** in the pop-up window.

If an edit requires a course ID, click **View Courses** to view a searchable and sortable list of training courses, along with their course IDs. If the course ID cannot be found, refer to the Adding Training Providers and Courses section of this tutorial for further details.

Deleting Records

To remove a record, click **Delete** beside it.

Downloading Records

To download all training records in Excel format, click **Download Records**.

User Account Connections

When working with training records, it is important to note that actions performed on training records in the Training Record Management System are also automatically performed on records located in the Completed Training section of a user's account, and vice versa. In other words, if a record or certificate in the Training Record Management System is added, deleted, or edited, the same action will be performed on the corresponding record in the user's account. Similarly, if a training record or certificate is added, edited, or deleted in a user's account, the corresponding record in the Training Record Management System will be updated accordingly.

If certificate, invoice, or PO numbers are included when uploading multiple records to the Training Record Management System using the Multi-Record Uploader, they will also be included in the training records added to the Completed Training section of the user's account. Similarly, if certificate, invoice, or PO numbers are added when editing a record in the user's Completed Training section, they will be included in training records that are downloaded from the Training Record Management System.

The Training Matrix Tab

The Training Matrix tab is the page in the Training Record Management System that can be used to:

- Create self-designated company roles and training topics
- Create, view, and edit a training matrix—a visual grid showing training requirements and recommendations, organized by training topic, company role, and location
- Designate training topics as required, recommended, or optional
- Approve courses that satisfy a training topic's requirements, and automatically assign those courses to user accounts
- Generate a report identifying users who have not yet completed mandatory training

Creating a Training Matrix

The first time the Training Matrix tab is clicked, a message is displayed stating that no training matrix is available. At least one company role and training topic must be added to the system to create a training matrix, although an unlimited number of roles and topics can be added.

A company role is any self-designated organizational role, such as Dispatch Manager or Crane Operator. A training topic is any term that might be used to describe a general area of training, such as Fall Prevention or First Aid.

When at least one role and topic has been added to the system, a training matrix is automatically generated. The training matrix can be viewed at any time by clicking the Training Matrix tab.

Adding, Editing, and Deleting Company Roles

To add company roles:

1. Click **Edit Roles and Topics** on the Training Matrix tab.
2. Enter one or more roles in the Add Company Roles field. If multiple roles are being added, separate them with a comma.
3. Click **Add**.

   Roles are displayed in alphanumeric order under the Company Roles column on the Roles and Topics page.

To edit a company role:

1. Click **Edit** next to the role to be modified.
2. Enter a name in the provided field.
3. Select or deselect categories assigned to the role, if applicable. Refer to the Role and Training Topic Categories section of this tutorial for details on adding categories.
4. Click **Save**.

To delete a company role:

1. Click **Delete** next to the topic to be removed.
2. Click **OK** to confirm the deletion.

Assigning Company Roles to Users

Once company roles are created in the Training Matrix, they are also added as options in the Company Role field in users' accounts. Users must be assigned a company role before location-specific training topics and courses designated by the training matrix can be automatically added to their accounts.

To assign a role to a user:

1. Click **Search** in the main navigation menu.
2. Enter the user's name in the Search Criteria field, then click **Search**.
3. Find the user's name in the list of search results, then click **Edit** beside it.
4. Scroll down to the Company Information section.
5. In the Company Role selection box, select one or more roles that apply to the user.
6. Click **Save**.

Adding Training Topics

To add training topics:

1. Click **Edit Roles and Topics** on the Training Matrix tab.
2. Enter one or more roles in the Add Training Topics field. If multiple topics are being added, separate them with a comma.
3. Click **Add**.

Training Topics are displayed in alphanumeric order under the Training Topics column on the Roles and Topics page.

Editing Training Topics

To edit a training topic, click **Edit**. This takes you to a new page where you can edit several aspects of the training topic, including its name, assigned categories, approved courses, expiry date, ID, user filter, and registration instructions.

To edit the topic name, assigned category, expiry date, or topic ID:

1. Click Edit in the topic name header, then, as needed:
    - Enter a new name in the provided field.
    - Select or de-select assigned topic categories, if applicable. Refer to the Role and Training Topic Categories section of this tutorial for details on adding categories.
    - In the Expiry Override field, enter the number of months after which the certificate for any courses approved for the training topic will expire. This setting will override the normal expiry date for these courses. For instance, if you want all approved courses for this training topic to expire in 12 months, thus overriding whatever expiry is associated with each individual course, enter 12 in the Expiry Override field.
    - If an alphanumeric topic ID needs to be included along with the topic name in completion notifications and reports for company-specific purposes, enter alphanumeric characters in this field. The topic ID will preface the topic name in reporting results.
2. When finished making changes, click **Submit**.

To limit the topic so that it is only required for new users:

1. Toggle New Users Only to **ON**.
2. Click the drop-down arrow.
3. In the New User Status Expiration field, enter a number of days beyond which a user is no longer considered a new user. This number of days will be used in conjunction with the date field in each user’s account to determine when this topic will no longer be required.
4. Click **Submit**.

Approving Courses for Training Topics

Particular courses from various training providers can be approved as fulfilling the requirements of each training topic. For example, First Aid may be set as a training topic, but only St. John Ambulance’s Standard First Aid-Level C CPR and AED and Canadian Red Cross’s Standard First Aid & CPR courses may be approved as fulfilling the First Aid training topic requirements. By approving courses for topics, courses can be automatically assigned to user accounts if the courses are available through the system or, when the courses are not available through the system, users are provided with detailed contact information for registering for courses with approved training providers. Refer to the Automatic Topic and Course Assignment section of this tutorial for further details.

To approve courses for a training topic:

1. Enter a course title, training provider, content owner, province/state, or course ID in the Search Criteria field, then click **Search** to view a list of courses already entered in the system that match the search criteria. If a course with the same title is offered by more than one training provider, all entries in that row will be clickable. Click any row entry to reveal the courses and their associated training providers. Note that clicking **Reset** will return to a view that only displays courses that have already been approved for the training topic.
2. Check the box in the Select column next to any course to indicate that it is approved as fulfilling the requirements for the training topic. If uncertain which training provider to choose, select a course with Unknown as the training provider.
3. Next, check the Permission box beside any online course that should be automatically assigned to users' accounts if:
    - The training topic is set as required for their company role.
    - The user has never completed the course before.
    - The course is not already in the user's account from a previous assignment.
    - The course is not already in progress.

    Note that if a course is not available online through the system, the Permission box will be unavailable. Also note that courses assigned with the Permission box will be billable when they are completed.

4. Lastly, click **Approve Selected Courses**.

Courses that have previously been approved for a training topic will appear with a checkmark beside them and displayed in the middle of the Approved Courses page.

If a course to be approved does not appear in the courses list, it can be added to the system. Refer to the Adding Courses to a Training Provider section of this tutorial for further details.

Removing Approved Courses

To remove courses from the list of approved courses for a training topic, uncheck the box in the Select column next to each course to be removed, then click **Approve Selected Courses**. If the box for a course offered by multiple providers is unchecked, all associated courses will be de-selected.

Customizing Instructions for Registrants

To make registration for approved courses easier, customized instructions can be displayed to users when they click a training topic name or its associated registration button on their Training tab. These instructions can communicate useful information, such as when users need to go to an external website to purchase a course or use a code to register for their training.

To set up customized instructions:

1. Toggle Custom Instructions for Registrants to **ON**, then click the drop-down arrow to reveal additional options.
2. Enter a website URL in the Website field--for example, www.trainanddevelop.ca.
3. In the Code field, enter the code users will need when registering for a course, if applicable.
4. Enter custom instructions in the Instructions field, for example, “Go to www.trainanddevelop.ca.”, or “click Online Courses in the main navigation menu, then click a course title to purchase it.”.
5. Click the colour swatch to set the colour of the Instruction header bar that is displayed to users.
6. Click the image placeholder to select and upload an image to associate with the training topic. Alternatively, an image can also be uploaded by dragging and dropping it onto the placeholder. Images must be in .jpg or .png format, and must be less than 4 MB.
7. When done, click **Submit**.

Deleting a Training Topic

To delete a training topic:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**.
3. Click **Delete** next to the topic to be removed.
4. Click **OK** to confirm the deletion.

Editing the Training Matrix

Once company roles and training topics are created, training topics can be assigned as mandatory or recommended training to all users who have those roles.

Important: Care and attention must be used when modifying the training matrix, as it is a powerful and far-reaching tool that instantly updates user accounts based on changes made to it.

To receive email notifications whenever changes are made to the training matrix:

1. Click the **Admin** tab.
2. Click the **Setup** icon.
3. Under the Optional Features section, click the **Training Record Management System** drop-down arrow.
4. Toggle Training Matrix Notifications to **ON**.
5. Enter an email address in the field provided.
6. Click **Save**.

Assigning a Training Topic to a Role

To assign a training topic to a company role:

1. Click the **Training Matrix** tab.
2. From the View Matrix For drop-down menu, select a location of the training matrix to edit. If categories have been created, a category from the Filter By drop-down menu may also be selected. Refer to the Role and Training Topic Categories section of this tutorial for details on adding categories.
3. Find the column containing the topic to be assigned to a role.
4. Find the row containing the role that the training topic will be assigned to.
5. Click the cell that is at the intersection of the row and column to change its status.

   Each time a cell is clicked, its status will change:

   - "**R**" indicates that the training topic is required for all users who have this company role.
   - "**O**" indicates that the training topic is recommended for all users who have this company role.
   - A blank cell indicates that the training topic is not required for users who have this company role.

Because locations are hierarchical in the system, there are a few important notes to be aware of when editing a training matrix:

- If the status of a cell in a location that is the hierarchical parent of other locations is changed, the child locations below it will inherit the same cell status. For example, if a cell's status is changed so that the First Aid training topic is mandatory for the Site Supervisor role in location A, and location A is the hierarchical parent of locations B, C, and D, then First Aid will also become a mandatory training topic for Site Supervisors in locations B, C, and D.
- If a cell's status in a location is changed, the cell status of all other locations that are at an equal hierarchical level will remain unchanged. For example, if locations B, C, and D are all children of a location, and the cell status in location B is changed, the status of the corresponding cells in locations C, and D will remain unchanged.
- If a parent location and all its child locations have a topic set as required or recommended for a certain role, and the cell status on a child location's training matrix is changed, all parent locations above it will display an "**L**" in that cell. "**L**" means that the topic is location-specific—in other words, not all locations share the same cell status. If an "**L**" in the training matrix is hovered over with a mouse, a pop-up display shows the status of that particular topic and role combination in all locations.
- If a cell with a status of "**L**" is in a location that is a parent of other locations and is clicked, the system will verify that all required location-specific training should be erased from that role. If **OK** is clicked, the cell will be emptied for this location and all of its child locations.

Automatic Topic and Course Assignment

Once training topics have been set as mandatory or recommended within the training matrix, the system automatically places either the training topics, or their approved courses, under the appropriate header in users' accounts:

- Online Courses, Forms, and Assessments will contain approved courses if:
    - The courses' training topics are mandatory.
    - The approved courses are available through the system.
    - The Permission box was checked to add the approved courses to user accounts.
- Required Classroom and Third Party Online Training will contain training topics if either:
    - Training topics are mandatory but are not available through the system.
    - Permission was not provided to automatically add to user accounts any approved courses available through the system.
- Recommended Training will contain training topics that are not mandatory but can be completed by users if they desire.

A Register button will appear beside any training topics under the Required Classroom and Third Party Online Training header, and the Recommended Training header. When users click on a training topic name or its Register button, they can view a list of all approved courses for the training topic.

Role and Training Topic Categories

A training matrix can become very large as many roles and topics are added to it. To make the training matrix more manageable in these situations, categories can be used to only view a particular subset of roles and topics in the training matrix. Categories are simply general groupings to which any number of roles and topics can be assigned. When viewing a training matrix that has been filtered by a particular category, only the roles and topics that are assigned to the chosen category are visible.

Adding, Editing, and Deleting Categories

To add categories:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**, then click **Add Categories**.
3. Enter a name in the Category field, then click **Add**. Repeat this step as many times as required.

When at least one category is created, the Roles and Topics page will display all existing categories in a drop-down menu. To quickly add a new category, select **Add New** from the Filters drop-down menu. Alternatively, click **Manage Categories**, enter a new category in the field provided, then click **Add**.

To edit the name of a category:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**, then click **Manage Categories**.
3. Click **Edit** beside the category that needs to be changed.
4. Change the name of the category, then click **Save**.

To delete a category:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**, then click **Manage Categories**.
3. Click **Delete** beside the category that needs to be removed.
4. Click **OK** to confirm the deletion.

Assigning Roles and Training Topics to Categories

To assign roles to categories:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**.
3. Click **Edit** next to the role to be assigned to a category.
4. Click on one or more categories in the selection box, then click **Save**.

To assign training topics to categories:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**.
3. Click **Edit** next to the training topic to be assigned to a category.
4. Click **Edit** in the training topic header bar.
5. Click on one of more categories in the selection box, then click **Submit**.

It is important to note that at least one role and one topic must be assigned to a category in order to generate a training matrix for that category.

Removing Roles and Training Topics from Categories

To remove a role from a category:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**.
3. Click **Edit** next to the role to be removed from a category.
4. Click on one or more of the highlighted categories to deselect it, then click **Save**.

To remove a training topic from a category:

1. Click the **Training Matrix** tab.
2. Click **Edit Roles and Topics**.
3. Click **Edit** next to the training topic to be removed from a category.
4. Click **Edit** in the training topic header bar.
5. Click on one of more of the highlighted categories to deselect it, then click **Submit**.

It is important to note that if removals are made that result in a category no longer having at least one role and one topic assigned to it, no filtered training matrix will be available for that category.

Filtering the Training Matrix by Category

Once categories are created and a minimum of one role and topic has been assigned to each of them, it is possible to view a filtered training matrix that only displays the roles and topics assigned to a particular category. To view a filtered training matrix, select the category from the Filter By drop-down menu.

To view the unfiltered training matrix, which displays all roles and topics, select **All** from the Filter By drop-down menu.

Training Record Management System Reports

One important purpose of a training matrix is to specify training topics that are mandatory for certain roles. To identify users who have not yet completed required training topics, a Training Gaps report can be generated. To generate this report:

1. Click the **Training Matrix** tab.
2. Click **Training Gaps**.
3. Select a location from the View Matrix For drop-down menu, then click **Download**. The Training Gaps report will be generated as an Excel file.

   Note that if a parent location with child locations is selected, the Training Gaps report will list users in the parent as well as all child locations.

In addition to the Training Gap report, there are two other reports that are valuable for management of training records: the Training Record Report and the Expired Courses Report.

- The Training Record Report provides a complete training history for all users. To access this report:
  1. Click the **Admin** tab.
  2. Click the **Reports** icon.
  3. Select **Training Record Report** from the drop-down menu.
  4. Click **Submit**.
  5. Depending on your system role and location, a drop-down menu of locations may be displayed. If so, select a location, then click **Submit**. Otherwise, a location will be preselected and displayed on the page. Simply, click **Submit** to download the report. Note that this report can also be accessed from the Training Records tab, by clicking **Download Records** at the top or bottom of the page.
- The Expired Courses Report is another useful report. It lists all courses that have expired or will expire within 90 days. To access this report:
  1. Click the **Admin** tab.
  2. Click the **Reports** icon.
  3. Select the **Expired Courses Report** from the drop-down menu.
  4. Click **Submit**.

As a supplement to the Expired Courses Report, on the fifteenth of every month the system automatically notifies users, managers, and system administrators of any training records that have expired or will expire within 90 days. These monthly notifications make it easy to follow up on expired training.

The Training Providers Tab

The Training Providers tab displays a list of all training companies that have been added to the system. From this tab it is possible to:

- Add training providers that are not on the list and add any training courses they offer
- Edit any training provider information that is incorrect or outdated
- View a list of all training provider courses that can be used to create training records

Viewing Training Providers

When the Training Providers tab is clicked, a sortable and searchable list of training providers is displayed. In addition to containing the training provider's name and address, the list contains a Status column that shows whether the training provider offers courses internally or to the public. If the provider does not offer public courses, the Status will be displayed as Private; otherwise, it will be displayed as Public.

Browse the training provider list by scrolling through it, or sorting it by a column. To go to a specific page, click the page number in the record navigation bar, or select the desired page using the **Go To** drop-down menu. To go to the beginning or end of the list, click the appropriate arrow in the record navigation bar.

Additionally, the name of a training provider, city, province, or state can be entered in the Search Criteria field. The results will include any training providers that match the entered search criteria. Note that if a course title is entered as search criteria, the search results will display any training providers who offer that course. To return to the original list, click **Reset.**

To download the list of providers as an Excel file, click **Download Providers**.

Adding Training Providers and Courses

When attempting to add training records to users, it may be discovered that a course title or course ID does not exist in the system because either the course's training provider or the course itself has not yet been added. To remedy these situations, a training provider and the courses it teaches can be added to the system.

Adding a Training Provider

To add a training provider:

1. Click **Add Training Provider** on the Training Providers tab.
2. Enter as much information as possible ensuring all required fields are completed and that information is entered accurately and with as much detail as possible about the company, including all known locations and contacts. The system uses this information to let users know who to contact in order to register for a course, and where they can go to complete their training.
3. If the provider has multiple locations or contacts, click **Add** in the corresponding header as many times as necessary, and fill out the associated fields.
4. Click **Submit**.

Adding Courses to a Training Provider

To add courses to a training provider:

1. Click on the training provider's name displayed in the list on the Training Providers tab.
2. Click **Add** in the Courses header. A set of fields will appear at the bottom of the course list.
3. Enter the course title and content owner. The content owner is the company that owns the rights to the course being added. For example, the course may be taught by ABC Company but the course material and curriculum is provided by the Canadian Red Cross. In this example, Canadian Red Cross will be entered as the content owner.
   Important: When entering this information, it is important to enter the course title and content owner name exactly the same way as the training provider refers to it to avoid any potential confusion later.
4. Next, use the provided drop-down menu to indicate whether the course is taught online, in a classroom, or using a blended model that combines both.
5. Enter the Pass Mark as a percentage without the percent sign.
6. Enter an expiry for the course:
   - If the course expires in a certain number of months from the date it's completed, enter the appropriate number in the Expiry field.
   - If the course expires on the same date each year, check the Specific Expiry box, then use the appropriate drop-down menus to select a date and month, then choose **Current Year** from the Year drop-down menu.
   - If the course has a specific expiry date, such as December 31, 2020, check the Specific Expiry box, then select a date, month, and, year from the corresponding drop-down menus.
7. Select the Status of the course from the drop-down menu. Public courses can be accessed by anyone using the system; private courses can only be accessed by internal users.
8. Click **Submit**.

The course will appear under the Courses header with a system-generated Course ID.

Viewing Training Courses

A searchable and sortable list of all publically available and internal courses, along with their associated course IDs, can be viewed by clicking **Training Courses** on the Training Providers tab. Every course on this list can be added to training records, and approved to satisfy the requirements of a training topic in the training matrix.

Browse the course list by scrolling through it or sorting it by a column.

Additionally, the title of a course, the name of a training provider, or a province or state can be entered in the search criteria field. The results will include any courses that match the entered search criteria. To return to the original course list, click **Reset**.

To download the course list in Excel format, click **Download Courses**.

This is the end of the Training Record Management System tutorial. This tutorial can be viewed at any time within your online account. For assistance, contact us by phone (1–866–416–1660) or email (help@bistrainer.com).