Collect. Verify. Connect.

Training Manager Step-by-Step Guide

Before using Training Manager, you must:

1. Have employees entered in employee information
    1. Click on **Company Information**
    2. Click on **Employees**
    3. Click on **Employee Information**
    4. Click **Add New Employee**
        a. If uploading 25+ employees, a request for the Employee Data Template can be made to Customer Service (1-800-976-1303)

Setup: Building Blocks of Training Manager

1. Click on **Company Information**
2. Click on **Training Manager**
3. Click on **Setup**
4. Click on **Course Catalog, Instructors, Locations, and Training Providers**
5. Click + **Add New Course, Instructor, Location, Training Provider**
6. Enter pertinent information about the course, instructor, location, or training provider
7. Click **+ Save**

Profiles: Used to make scheduling easier

1. **Course Profiles** – group courses together that are frequently taken together (ex: First Aid and CPR)
2. **Student Profiles** – group employees together that would require taking same courses (ex: Welders, Painters)

Adding Profiles

1. Click **Company Information**
2. Click on **Setup**
3. Click on **Profiles**
4. Click **Add New Profile**
5. Select **Student** or **Course Profile**
6. Type in **Profile Name**
7. Then, Click **Add New Course** to **Profile**
8. Select **Course(s) to add** to **profile**
9. Click **+Save**

Allowing Owner Clients to View Training

1. Click **Company Information**
2. Click **Training Manager**
3. Click **Setup**
4. Click **Grant Client Access**
5. Click on the **pencil icon** next to the applicable Owner Client name
6. Click +**Add New Course**
7. Select **Course Type** from dropdown menu
8. Use arrow keys to move the applicable courses to the box on the right
9. Select **Permission Expiration Date**
10. Click **+Save**

Course/TQ Equivalencies

Use TM to track qualifications required for TQ activities. Can set TM notifications to know when TQ qualifications need to be renewed.

Adding Course/TQ Equivalency

1. Click **Company Information**
2. Click on **Training Manager**
3. Click on **Setup**
4. Click on **Course/TQ Equivalency**
5. Click on **Add Equivalency**
   Step 1: Select **Course** from **Training Manger** (Hint: Helpful to have Course ID and Course Name match TQ Qualification Code and Qualification Name)
   Step 2: Select **Non-Verified Training Qualification**. Choose whether to check box to apply Course/TQ Equivalency to Historical TM Entries (which will process within 24 hours)
6. Click **+ Save Equivalency**

Adding Job Requirements

1. Click on **Company Information**
2. Click on **Training Manager**
3. Click on **Requirements**
4. Click on **Job Requirements**
5. Click on **+ Add New Requirements**
6. Select the combination of job class, job department, job site and/or business unit to be associated with specific training requirements. You can select multiple categories within a field by holding down CTRL on your keyboard while you click. Job Class, Job Department, Site and Business Unit are established in the Employees section on the Jobs tab.
7. Select the courses that will be required
8. Click **+ Save**

Adding Employee Requirements

1. Click on **Company Information**
2. Click on **Training Manager**
3. Click on **Requirements**
4. Click on **Employee Requirements**
5. Click on **+ Add New Requirements**
6. Enter the desired search criteria
7. Click **Search**
8. Select the courses that will be required. To select multiple courses, hold down the CTRL key while you click on the courses.
9. Click **+ Save**

Scheduling Courses

1. Click **Company Information**
2. Click **Training Manager**
3. Click **View/Schedule Courses**
4. Click **Schedule Courses**
5. Highlight the **Courses** to schedule and click the arrow to move them to the box on the right of the page (**Note**: there are filters on this page to assist in narrowing the results)
6. Click **+Save/Next**
7. Highlight the **Employees** to schedule and click the arrow to move them to the box on the right of the page (**Note**: there are filters on this page to assist in narrowing the results)
8. Click +**Save/Next**
9. Enter **Course Details -** If Instructor, Location or Training Provider are not appearing in drop down, click Add button to the right
10. Click **+Save/Next**
11. Click the pencil icon in the **Edit** column for each course to update applicable details
12. Click **+Save**

Email Settings/Notifications for Training Manager

1. Click **Company Information**
2. Click **Company Profile**
3. Click **Company Notifications**
4. Click the pencil icon to the right of **Training Manager**

5. Check box to the right of the notification you would like to enable (Note: these can be selected for the Student, Supervisor or Location Contact)
6. Click **+Save**

Training Manager Reports

Course Enrollment Check - Reports all employees who have NOT been scheduled for a specified course.

1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Course Enrollment Check**
4. Select course from dropdown
5. Filter employees by name or other available fields (Optional)
6. Click **Search**

Course History Details - Reports course history by instructor, location or training provider

1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Course History Details**
4. Select **Course Filter (Instructor, Location or Training Provider)** from dropdown
5. Select **Specific Filter**
6. Select additional Filters (Optional)
7. Click **Search**

Employee Course History - Lists all employees and shows each course the employee has taken or is scheduled to take.

1. Click on **Training Manager**
2. Click on **Reports**
3. Click Emplo**yee Course History**
4. Select **Employees** by filtering by name or other applicable fields
5. Select **Courses** (Optional)
6. Click **Search**

Employees By Location - Reports the training records for all employees and organizes the employees based on their Location/Department. Provides requirements status.

1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Employees By Location**
4. Select **location(s)** (Use **CTRL** button on keyboard to select multiple locations)
5. Click on arrows to Select Location(s)
6. Select Requirements filter from dropdown
7. Filter **Employees** (Optional)
8. Filter **Courses** (Optional)
9. Click **Search**

Employees For Selected Course - Lists employee training status for a specific course.

1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Employees For Selected Course**
4. Select **Course** from dropdown
5. **Filter Employees** (Optional)
6. Select **Course Date** Filters (Optional)
7. Click **Search**

History/Schedule/Renewal - Reports training history, scheduled training or renewal information

1. Click on **Training Manager**
2. Click on **Reports**
3. Click **History/Schedule/Renewal**
4. Select **Report Filters** from the dropdowns

5. Search for Employees by entering employee details or selecting from applicable dropdown(s)
6. Click **Filter**
7. Select **Employees** (Use CTRL button to select multiple employees)
8. Alternatively check Select **All** button
9. Click on arrows to select/remove employees from search
10. Search for Courses by entering course details or selecting from applicable dropdown(s)
11. Click **Filter**
12. Select **Courses** (Use CTRL button to select multiple courses)
13. Alternatively check **Select All** button
14. Click on arrows to select/remove courses from search
15. Click **Search**

Job Requirements Matrix - Reports the job history requirements and training status for selected employees
1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Job Requirements Matrix**
4. Select at least **One Job Requirements Filter**
5. Search for Employees by entering employee details or selecting from applicable dropdown(s)
6. Click Filter
7. Select **Employees** (Use CTRL button to select multiple employees)
8. Alternatively check **Select All** button
9. Click on arrows to select/remove employees from search
10. Select Additional Filters (Optional)
11. Click **Search**

Percent (%) Of Requirements Complete:
1. Click **Company Information**
2. Click **Training Manager**
3. Click **Reports**
4. Click **% Of Requirements Complete**
5. Select from drop down to view summary by Location or Employee
6. Select **Report As Of Date** (Required)
7. Select filters to **Filter Employees** (Optional)
8. Select filters to **Filter Courses** (Optional)
9. Click **Search**
10. Click **Document** to save to computer as Excel

Training Matrix - Reports the training requirements and completion status for employees based on one or several of the following filters: job history, location course specific and employee specific.
1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Training Matrix**
4. Search for employees by entering employee details or selecting from applicable dropdown menu(es)
5. Click **Filter**
6. Select employees (Use **CTRL** button on keyboard to select multiple employees)
7. Alternatively check **Select All** button
8. Click on **arrows** to select/remove employees from search
9. Search for courses by entering course details or selecting from applicable dropdown menu(es)
10. Click **Filter**
11. Select **Courses** (Use **CTRL** button to select multiple courses)
12. Alternatively check **Select All** button
13. Click on arrows to select/remove courses from search
14. Click **Search**

Training Requirements Matrix - Reports the training requirements and completion status for employees based on one or several of the following filters: job history, location, course specific and employee specific.
1. Click on **Training Manager**
2. Click on **Reports**

3. Click on **Training Requirements Matrix**
4. Select **Job History/Locations/Departments Filter** (Optional)
5. Search for Employees by entering employee details or selecting from applicable dropdown(s)
6. Click **Filter**
7. Select **Employees** (Use **CTRL** button to select multiple employees)
8. Alternatively check **Select All** button
9. Click on **arrows** to select/remove employees from search
10. Search for Courses by entering course details or selecting from applicable dropdown(s)
11. Click **Filter**
12. Select **Courses** (Use **CTRL** button to select multiple courses)
13. Alternatively check **Select All** button
14. Click on **arrows** to select/remove courses from search
15. Select **Date Filters** (Optional)
16. Click **Search**

Training Requirements - Reports the requirements set in Training Requirements Setup at both the Job Level and the Employee Level. Displays the employee's completion status of each requirement.

1. Click on **Training Manager**
2. Click on **Reports**
3. Click on **Training Requirements**
4. Enter employee details or select from applicable dropdown(s) (Optional)
5. Enter Course ID/Course Name/ Course Profile (Optional)
6. Click **Search**