RightonTrack

User Manual

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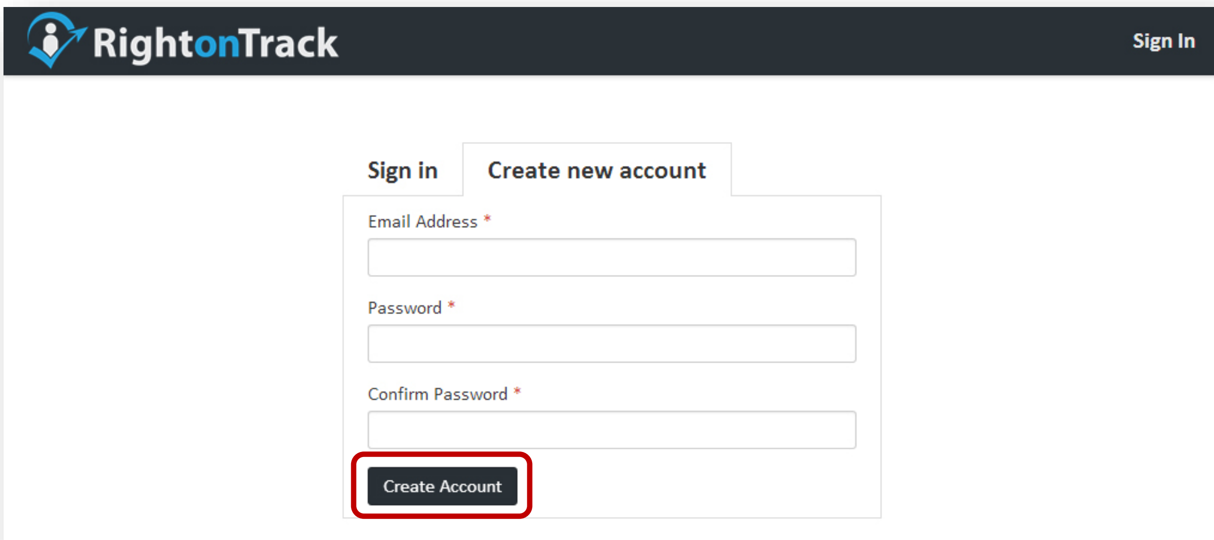
Sign Up

From the home page, click on **"Sign Up"**.

Enter your email address and create a password, then click **"Create Account".**



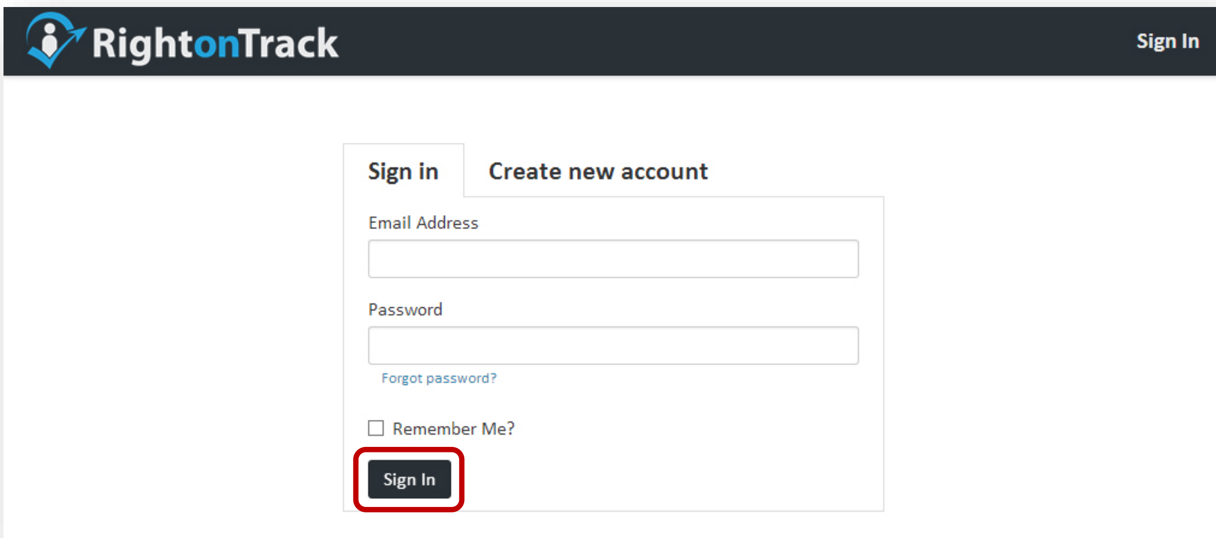
At this point, you can [create a new organization].

If your organization already has an account, you can join your existing organization using the confirmation number you received in your invitation email.

Sign In

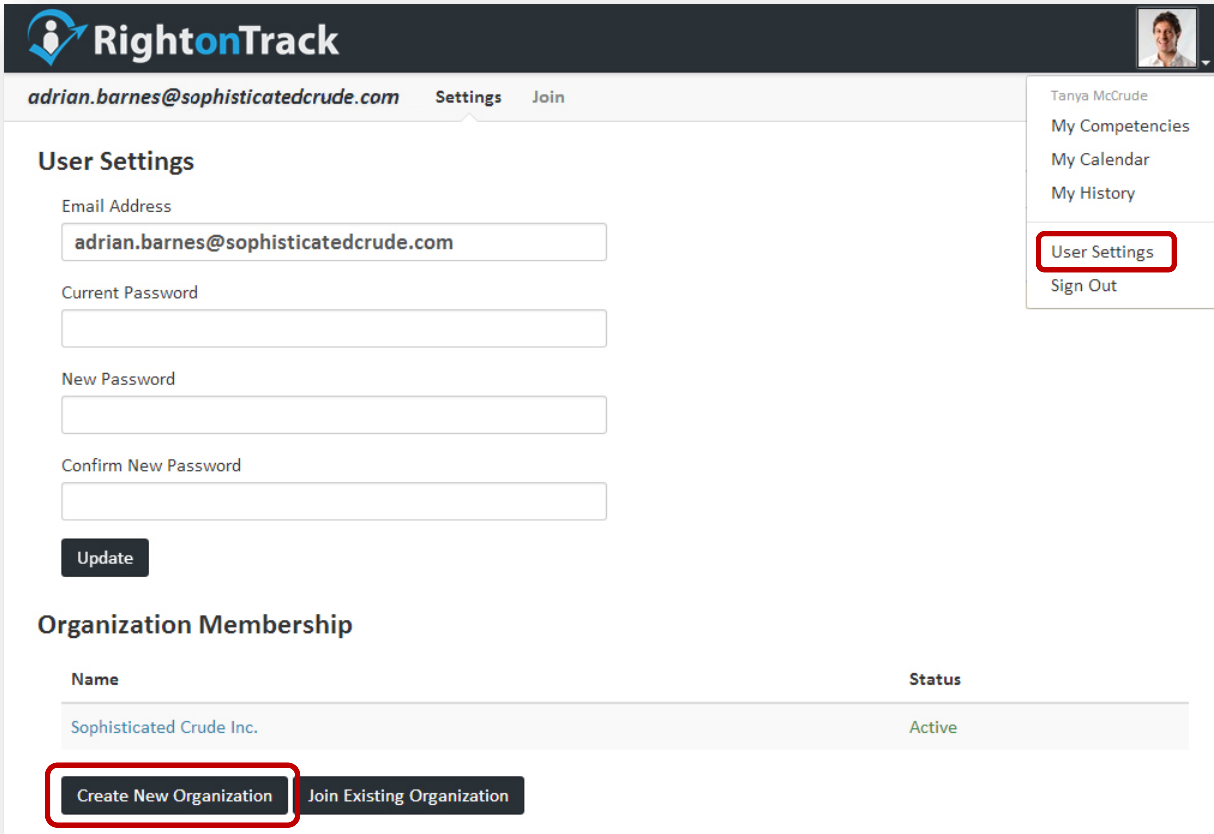
From the home page, click on **"Sign In"**.

Enter your email address and password, then click **"Sign In".**

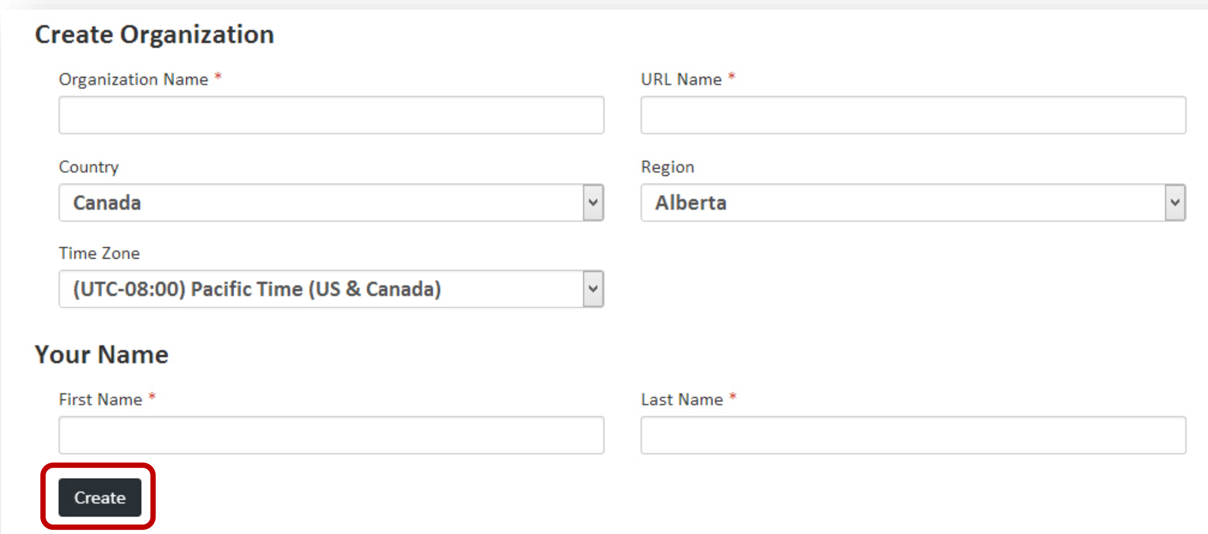


Create a New Organization

Click on your picture in the upper right corner. Choose **"User Settings"** from the dropdown list. Click on the **"Create New Organization"** button.



Enter the organization name, URL name (i.e. a shortened version of your corporation's name, without spaces or punctuation), country, region, time zone. Also enter your first and last name.



Change My Password or Switch Organizations

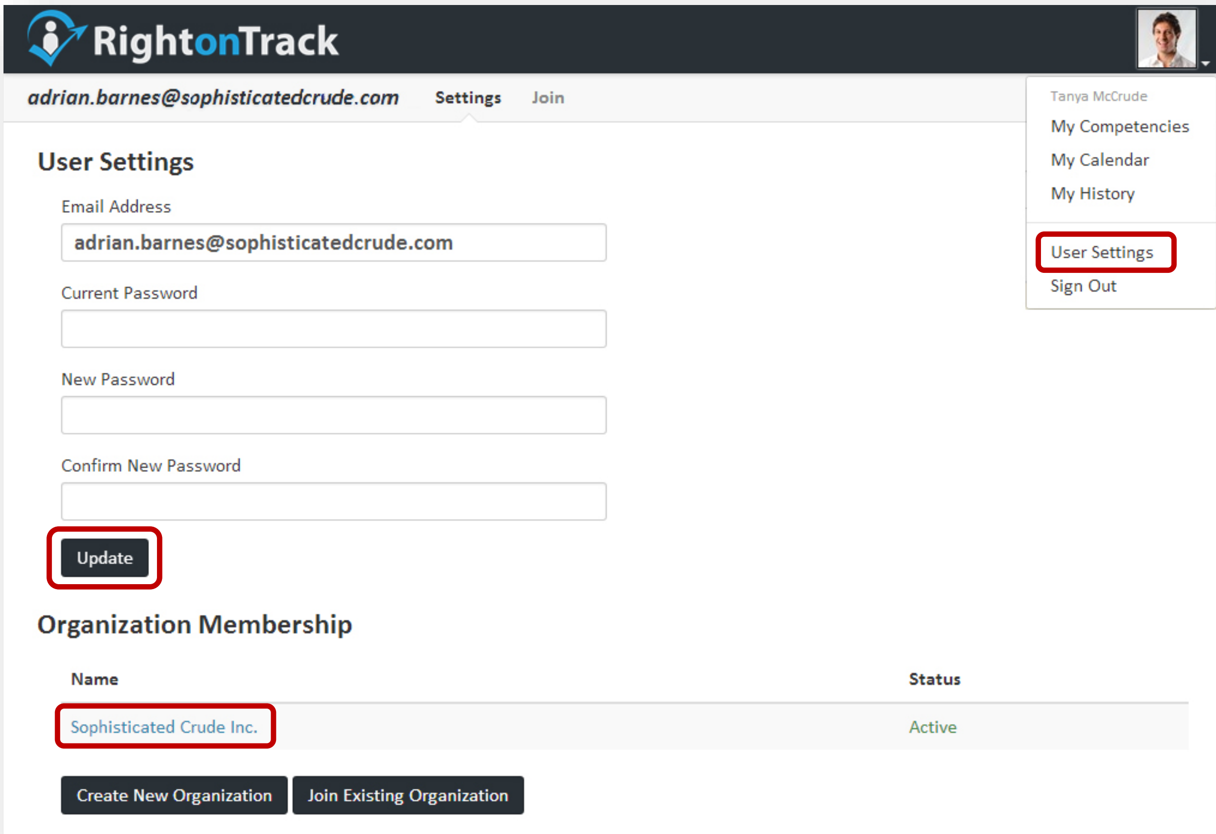
Click on your picture in the upper right corner. Choose **"User Settings"** from the dropdown list.

To change your password, enter your current password. Then enter your new password and confirm your new password. Press **"Update"** to save your changes.

To join another organization, click on the **"Join Existing Organization"** button and follow the settings in your registration email.

To switch between different accounts in different organizations, click on the name of the organization.

Note: Usually a user will only belong to a single organization.



Create, Deactivate, Reactivate, or Delete an Organization

Note: You must be an organization owner to deactivate, reactivate, or delete an account. Usually a user will only belong to a single organization.

Click on your picture in the upper right corner. Choose **"User Settings"** from the dropdown list.

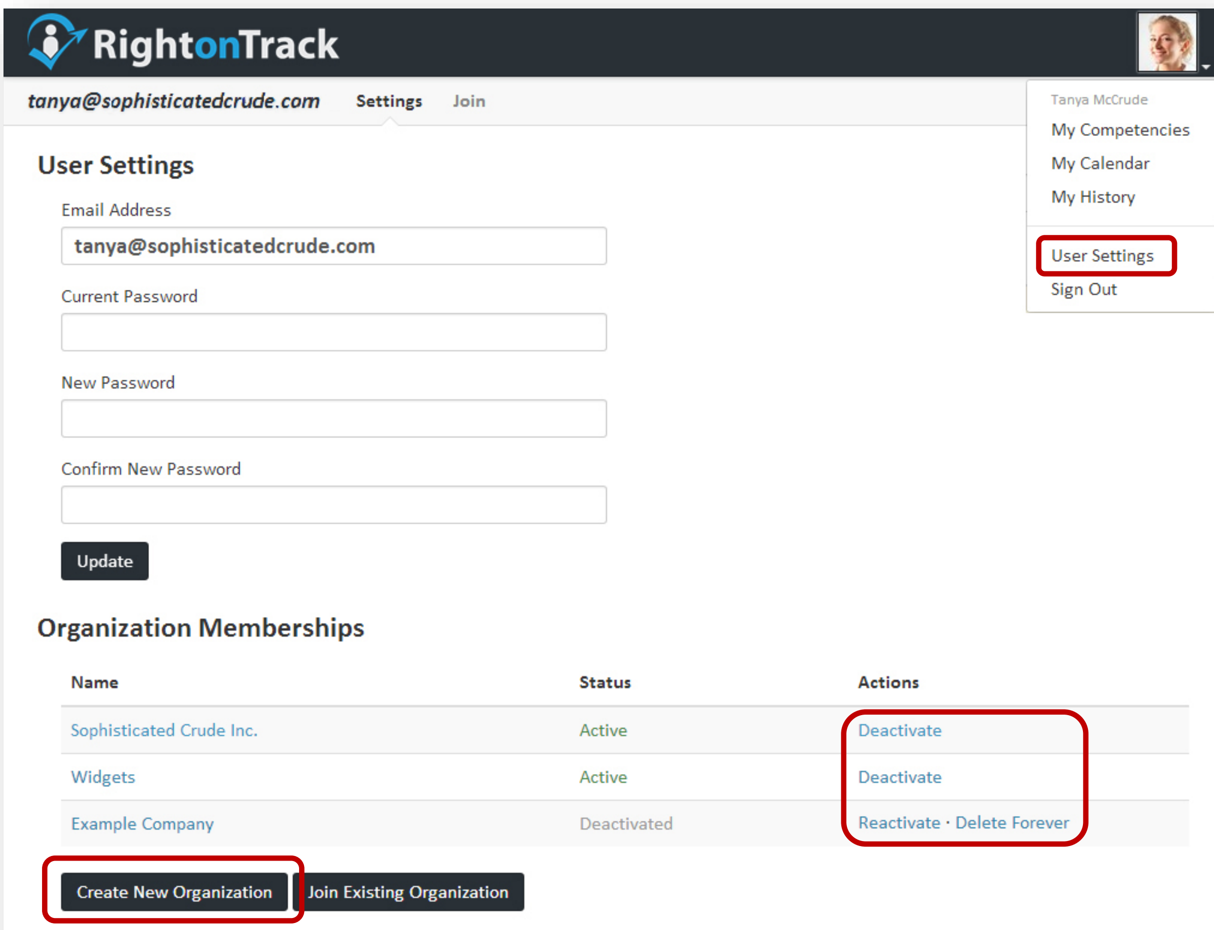
To create a new organization, click on the **"Create New Organization"** button at the bottom of the page.

To deactivate an organization, click on the **"Deactivate Organization"** link beside the account you wish to delete. Your current month will be billed, then the account will be suspended. If you make a mistake, you have up to six months to reactivate your account, after that your information will be deleted forever.

Once a subscription has been cancelled, you may click on **"Reactivate"** to reactivate an organization, or **"Delete Forever"** to permanently delete the organization.

Caution: Deleting an organization will **permanently and irretrievably delete all records** associated with that organization, including all workers, competencies, training, categories, and online (SCORM) course results.

See also: Deactivate Organization



Worker Access Levels

Note: If you create an organization, you will automatically be set as an owner. Each organization must have at least one owner.

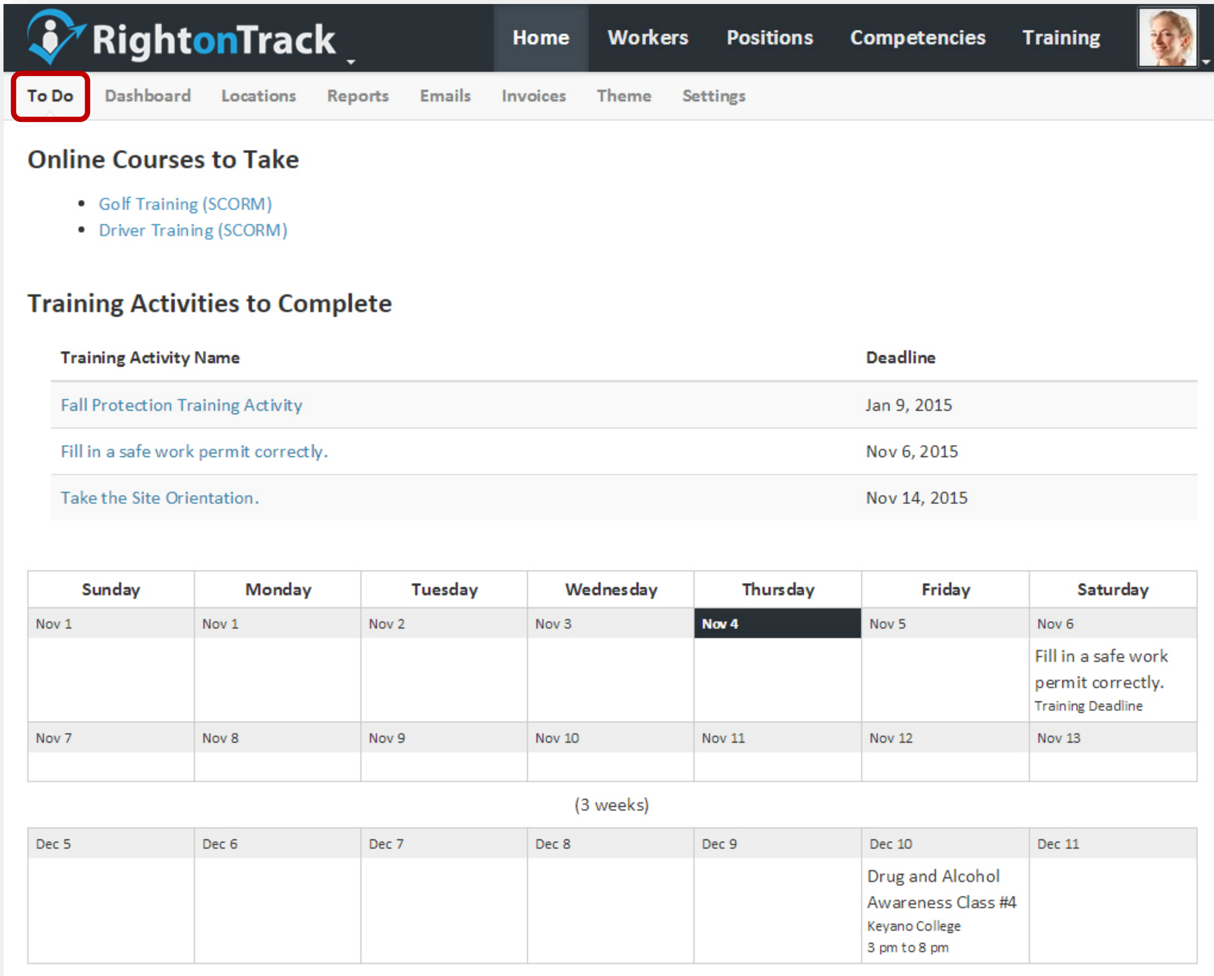
To set the access level for a worker, go to the worker details page.

There are four access levels in Right On Track: Employee, Training Assistant, Training Coordinator, and Owner. The permissions for each access level are shown in the chart below.

Access Level	Employee	Training Assistant	Training Coordinator	Owner
Can view information for **themselves and their subordinates.**	✓	✓	✓	✓
Can enroll **themselves or their subordinates** in training.	✓	✓	✓	✓
Can view information for **anyone** in the organization.		✓	✓	✓
Can enroll **anyone** in the organization in training.		✓	✓	✓
Can create new objects, such as workers, locations, positions, competencies, categories, training activities, classroom courses, and online (SCORM) courses.			✓	✓
Can edit organization settings (email frequency, theme, cost categories, time zone, organization name, etc.).				✓
Can delete, create, deactivate, or reactivate the organization.				✓
Can view and edit billing information (stored credit card, invoices, etc.) and purchase SCORM credits.				✓

View My “To Do” List

Click on the **"Home"** tab, then click on the **“To Do”** submenu tab. This will display your current “To Do” list, including your upcoming training activity deadlines, assigned online (SCORM) courses, and upcoming classroom training.

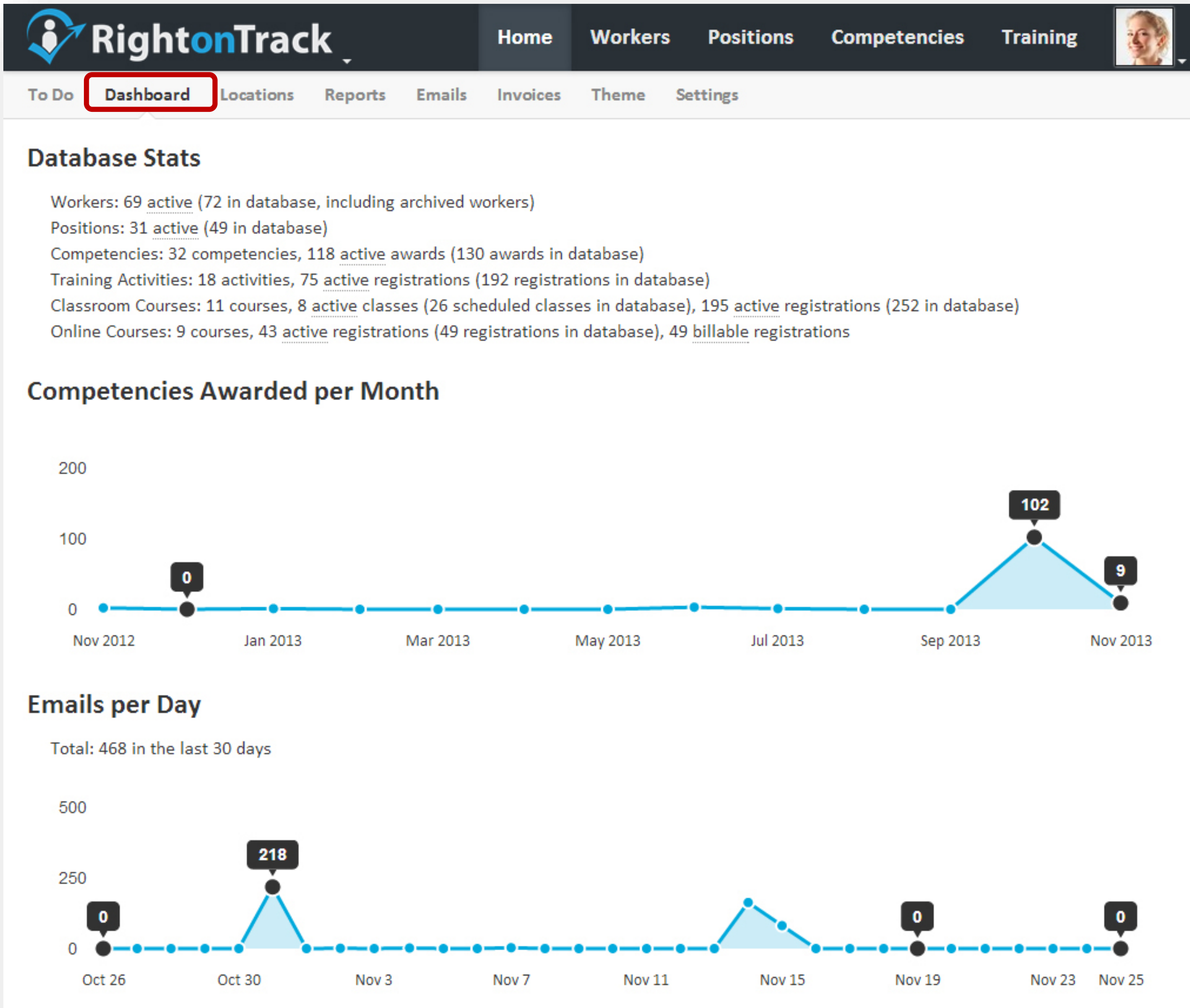


View Dashboard Display and Organization Statistics

The dashboard gives an overview of the organization statistics, including the number of active workers, positions, competencies, training activities, classroom courses, and online (SCORM) courses currently in the database.

The charts show the competencies awarded per month and the emails per day for the last 30 days.

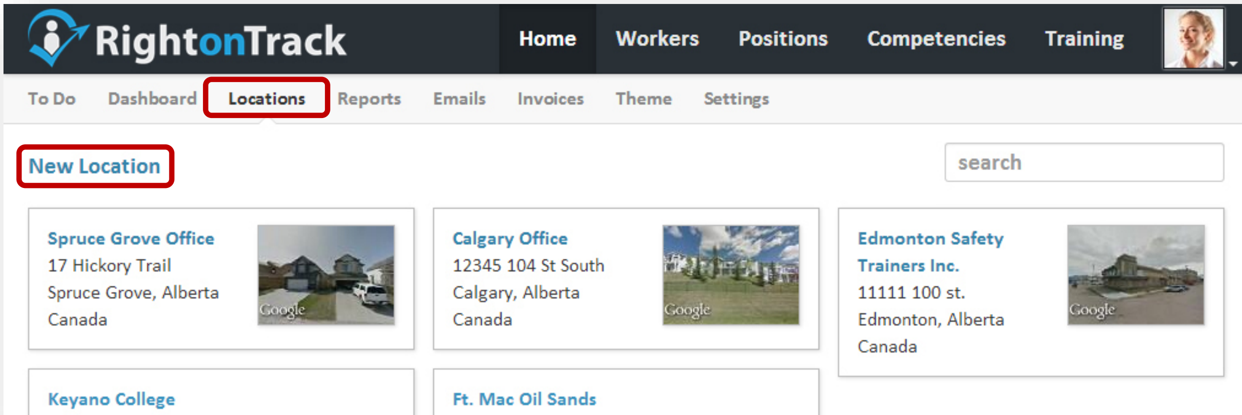
To display the dashboard, click on the **"Home"** tab, then click on the **"Dashboard"** submenu tab.



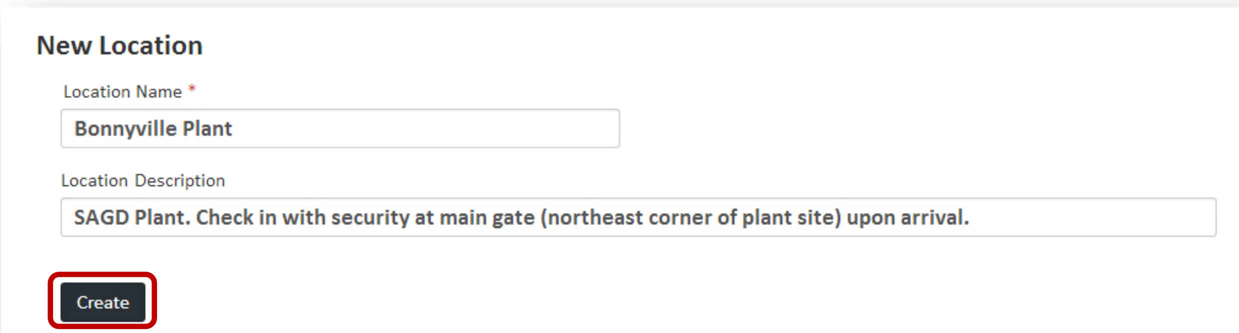
Create a New Location

Note: Workers can have none, one, or multiple locations. A classroom course must have a location for each course event.

Click on the **"Home"** tab. Click on the **"Locations"** tab on the submenu. Click on the **"New Location"** link, located in the upper left corner of the page.



Enter the location name. If you wish, you may enter additional information about the location under the location description. Press the **"Create"** button and the **"Details"** page for the newly created location will open.

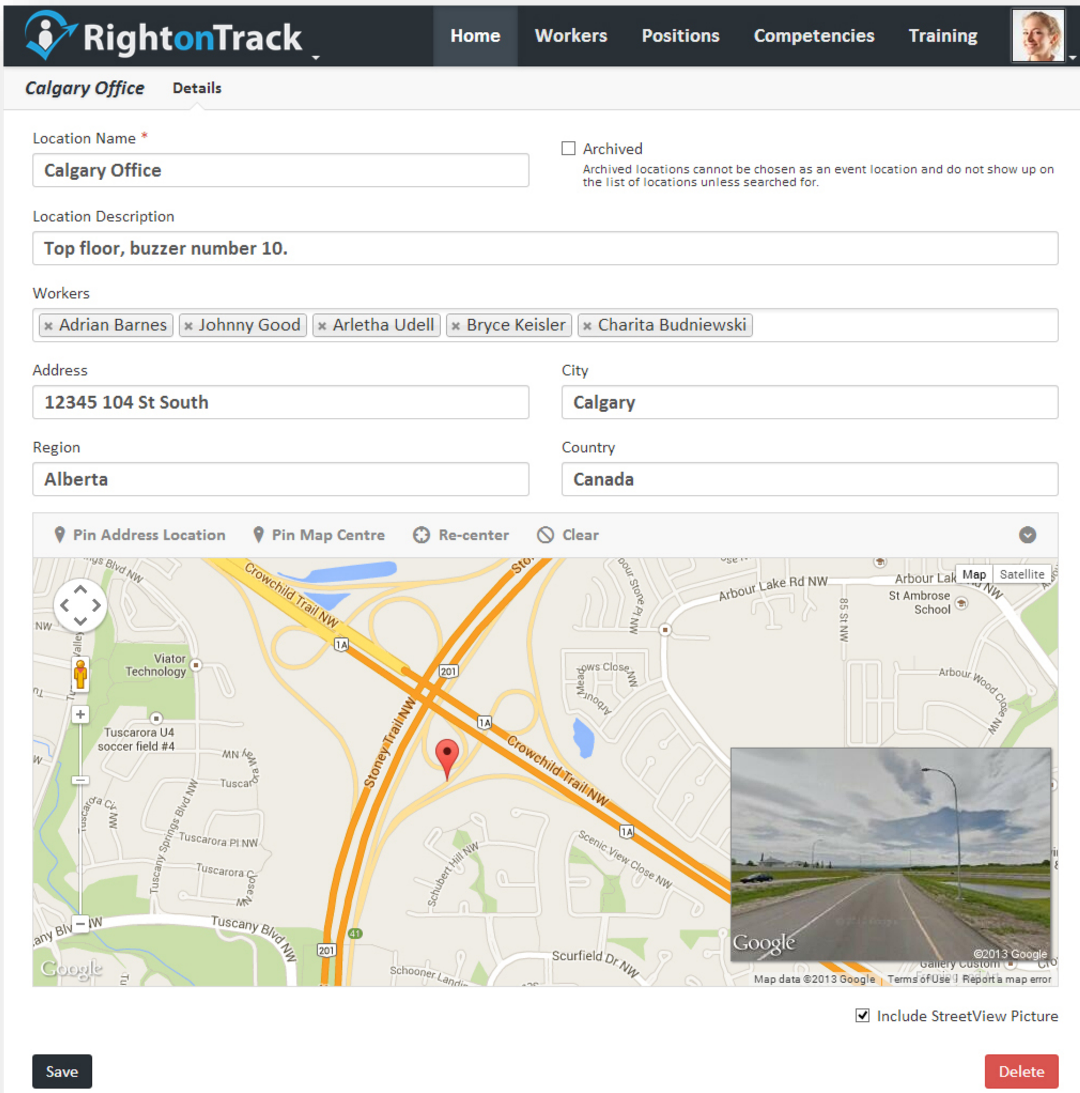


Edit Location Details

Click on the **"Home"** tab, then click on the **"Locations"** submenu tab. Click on the name of the location to open the location **"Details"** tab. From this page, you can enter a location name and description. To add workers to this location, click inside the **"Workers"** box and begin typing a worker's name. To remove workers from this location, click on the × beside the worker name.

Enter the address details for the location. Click on **"Pin Address Location"** to pin this address on the map. Choose "Include StreetView Picture" to include the picture for the location, if available. **"Pin Map Center"** places the pin in the center of the currently displayed map. **"Re-center"** changes the view so that the map is centered on the pin. **"Clear"** removes the pin from the map.

Note: If the pin doesn't show up in the correct location, you can manually move it to the correct spot on the map. If the StreetView picture doesn't show the right building, move the pin around on the building until the picture displays the desired view. StreetView is not available in all areas.



View All Workers at a Specific Location

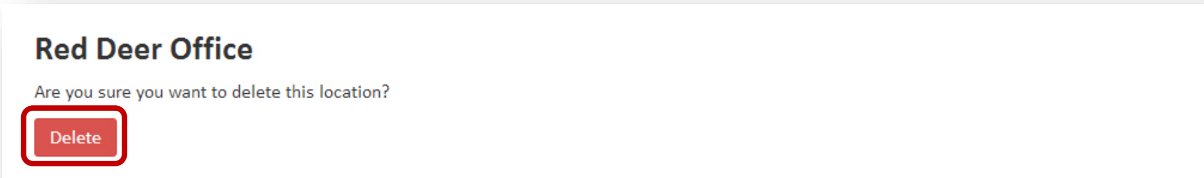
Click on the **"Home"** tab, then click on the **"Locations"** submenu tab. Click on the name of the location to open the location **"Details"** tab. A list of all workers at this location is listed under "Workers," halfway down the page.

Delete or Archive a Location

Click on the **"Home"** tab, then click on the **"Locations"** submenu tab. Click on the name of the location to open the location **"Details"** tab.

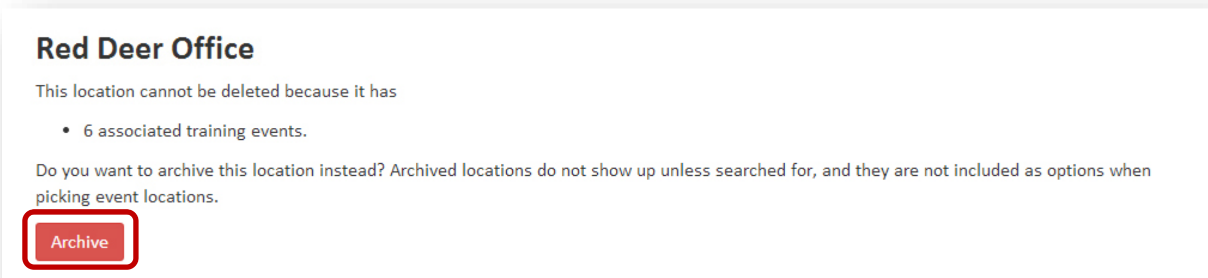
Press the **"Delete"** button at the bottom right side of the details page to delete the location.

When prompted, press the **"Delete"** button to confirm.

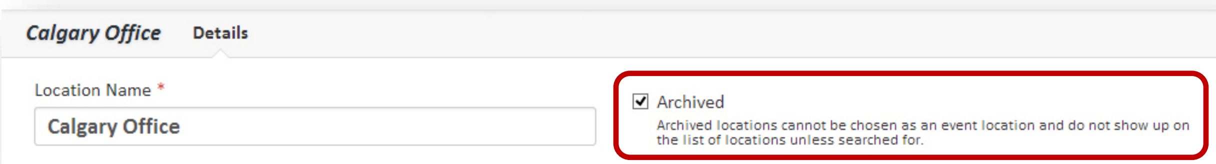


Note: You cannot delete a location if it has any scheduled class events associated with it. Instead, pressing the delete button in this case will prompt you to "archive" the location. See Archiving for more information.

When prompted, press the **"Archive"** button to archive the position.

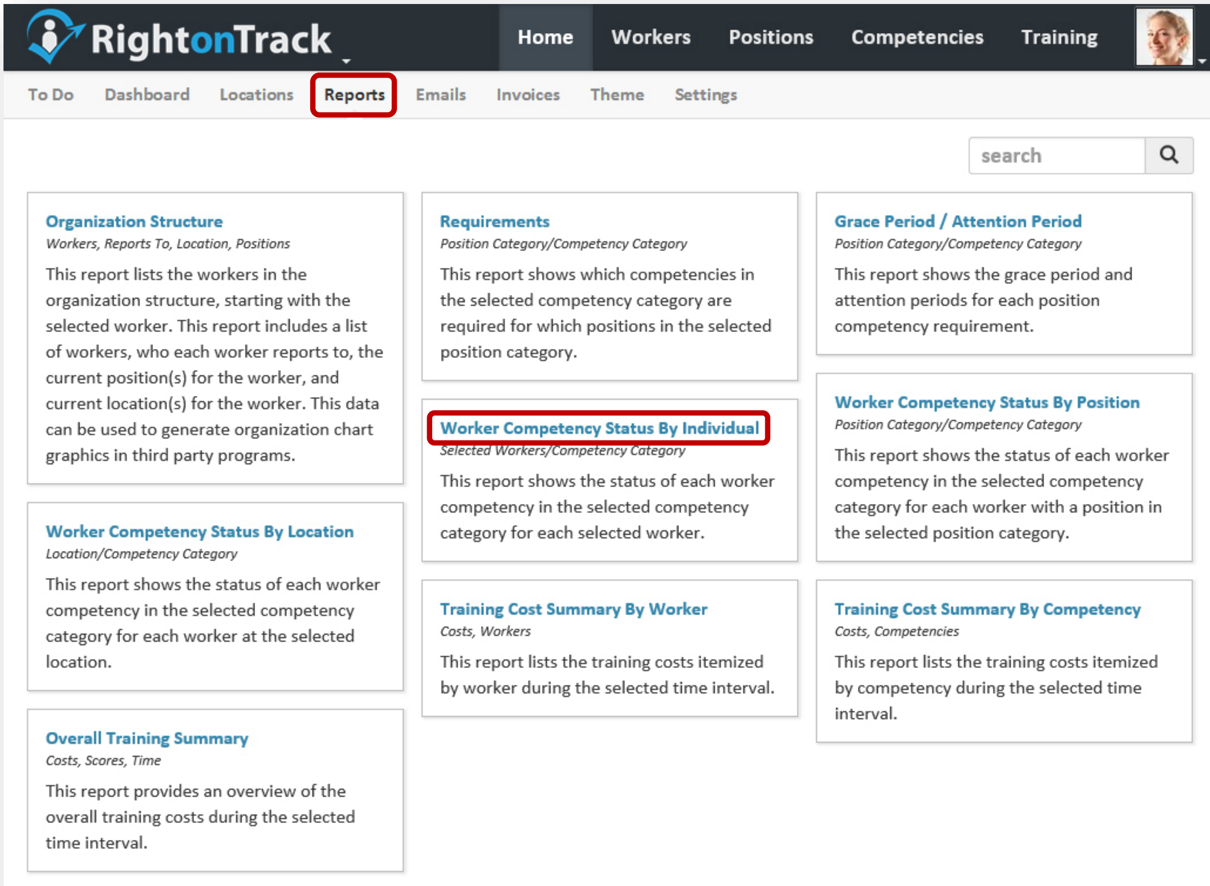


Alternatively, you can archive a position by checking the **"Archived"** checkbox on the position details page.

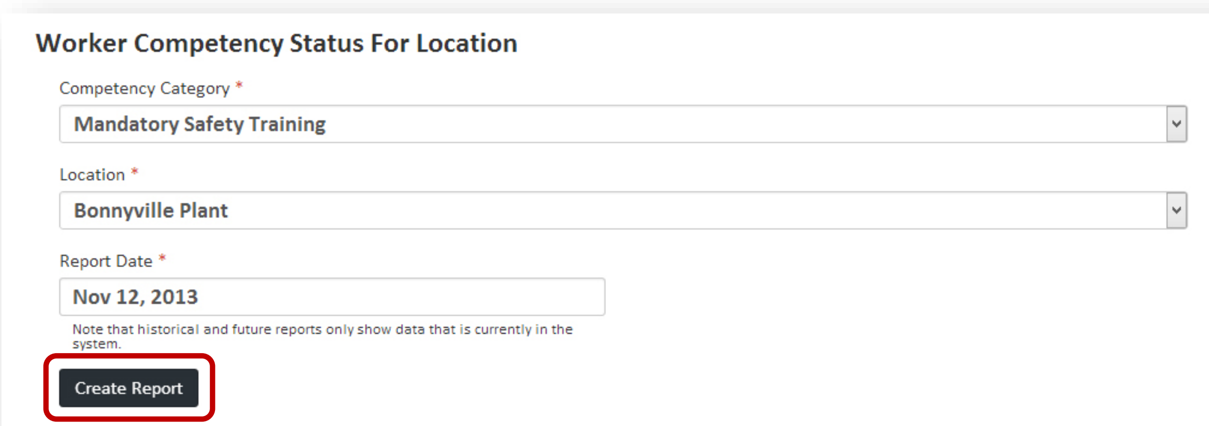


Generate a Training or Cost Report

Click on the **"Home"** tab, then click on the **"Reports"** submenu tab. This shows a list of reporting options. Click on the name of the report you wish to create.



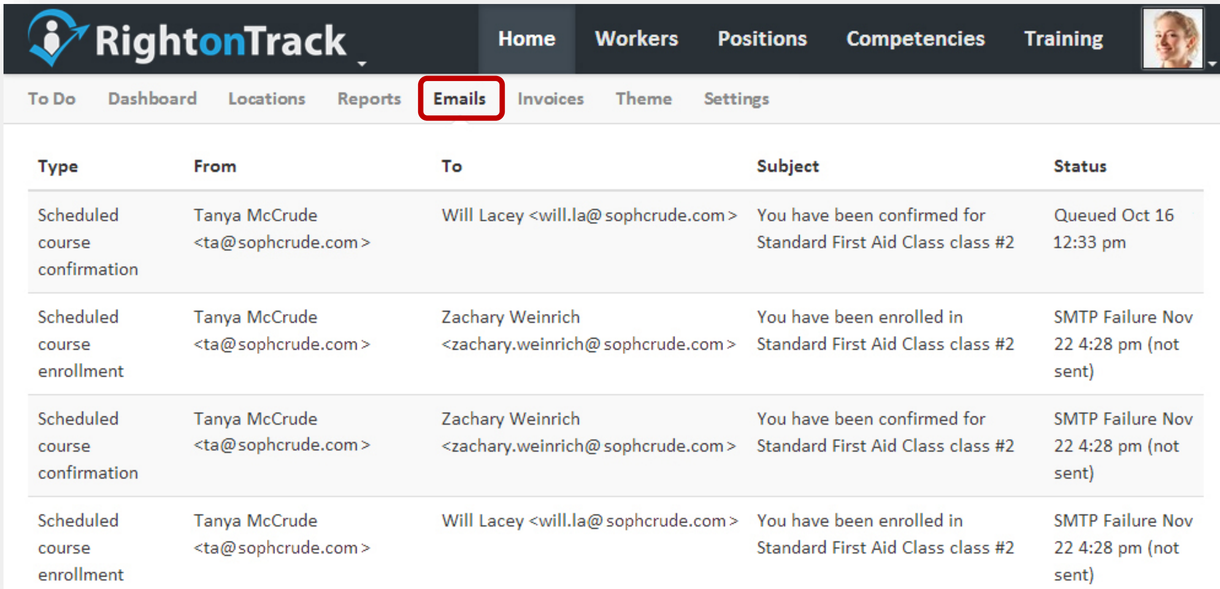
Enter any constraints (if applicable), then click on **"Create Report"** to generate the report. Required fields are indicated by a red asterisk (*).



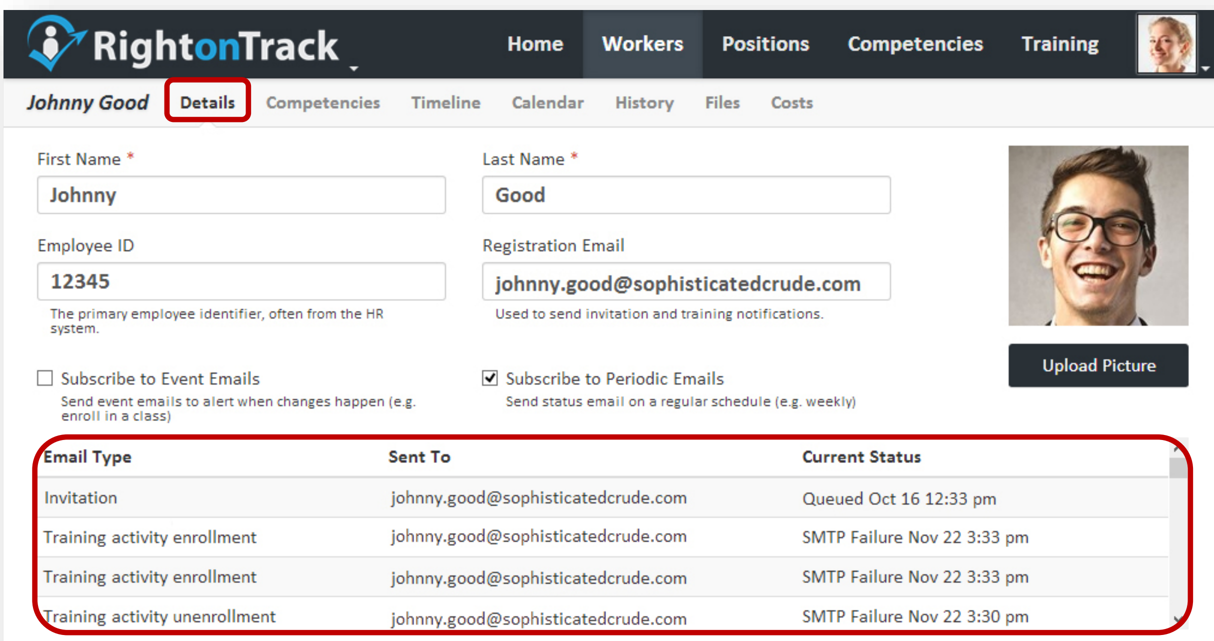
See also: [Use Microsoft Visio to Generate a Printable Organization Chart]().

How do I check email delivery status?

Click on the **"Home"** tab, then click on the **"Emails"** submenu tab. This shows a list of recently sent emails and delivery status for each email.



To check email delivery status for a specific worker, search for the worker then click on the worker's name to bring up the **"Details"** submenu tab. This page shows a list of recently sent emails for this worker and the current delivery status for each email.

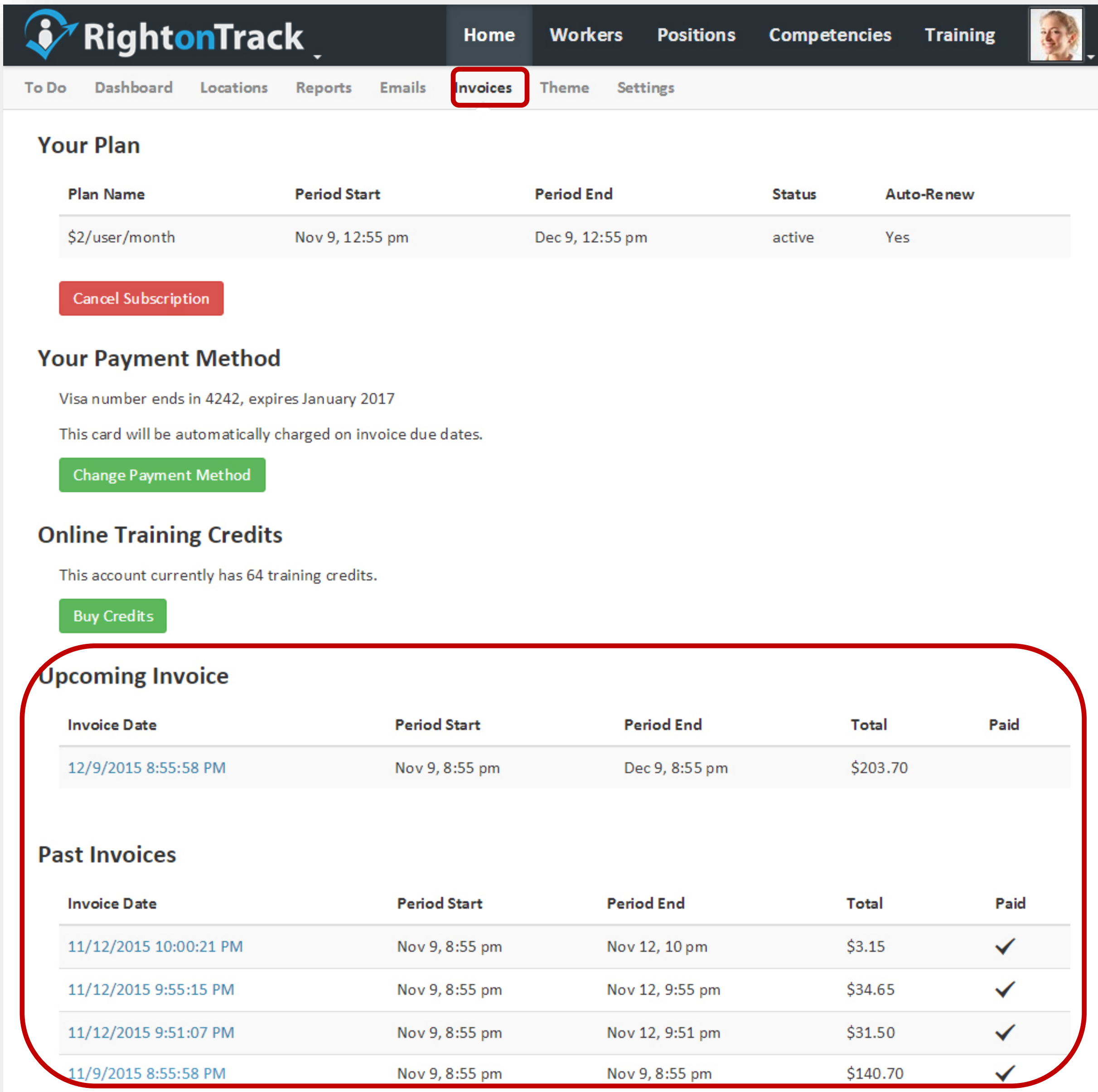


View Invoices

To purchase credits, click on the **"Home"** tab, then choose the **"Invoices"** submenu tab. Click on an invoice number to view details for a specific invoice. The total column shows the total for each invoice. A green checkmark indicates that the invoice has been paid.

The **"Upcoming Invoice"** shows the estimated total for the next invoice based on the peak number of workers recorded during the time period. Each invoice covers the period one month prior to the invoice date.

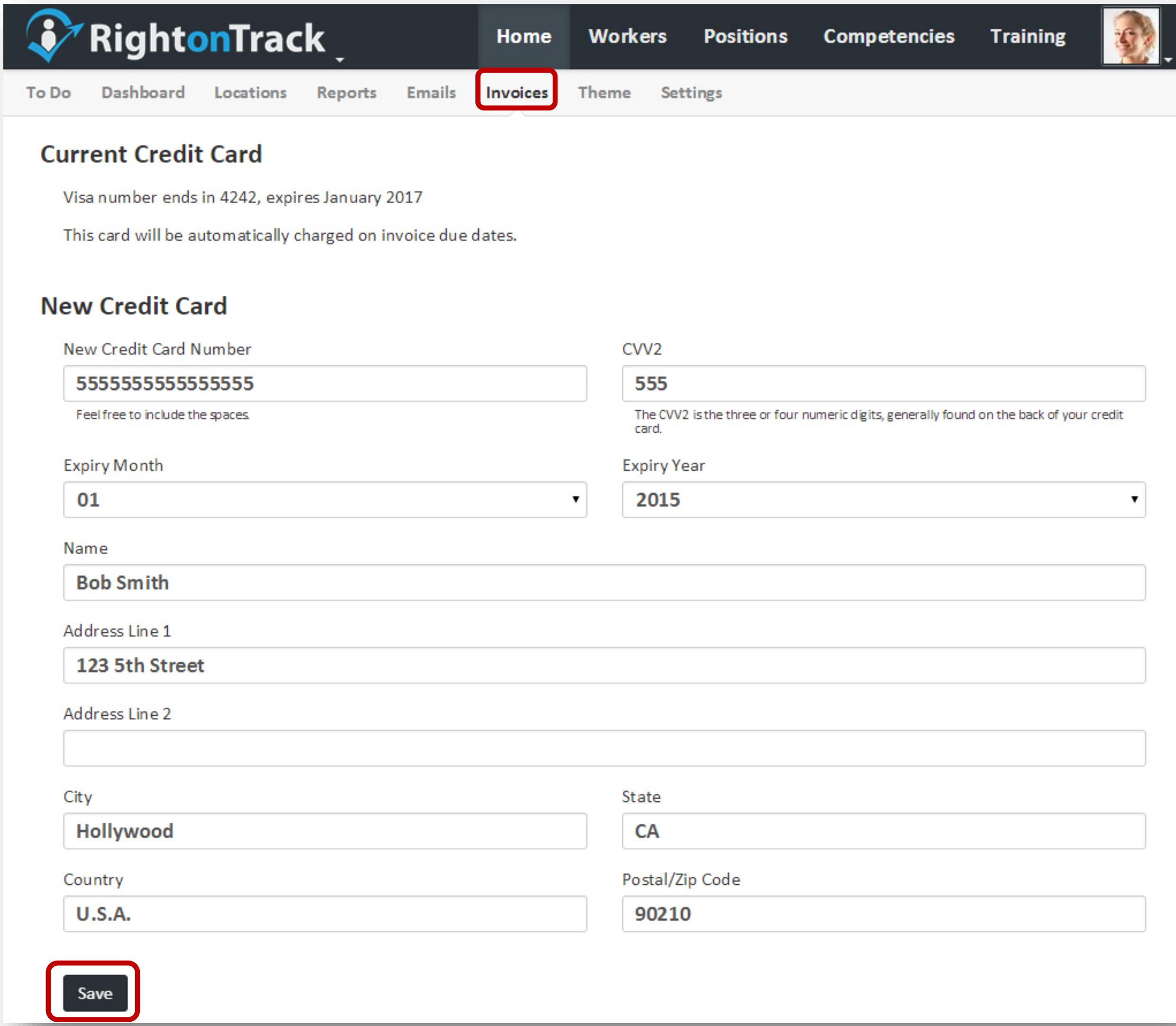
Click on **"Cancel Subscription"** to cancel your subscription (this will also deactivate your organization at the end of the current subscription period). You will not be billed again unless you reactivate the organization / subscription. Click **"Change Payment Method"** to change your credit card details. Click **"Buy Credits"** to buy online (SCORM) credits.



Change Payment Method

To enter a new stored credit card, click on the **"Home"** tab, then choose the **"Invoices"** submenu tab. Click on **"Stored Credit Card"**.

Enter the details under **"New Credit Card"** then press **"Save"**. For business credit cards, enter the business name instead of "First Name" and leave "Last Name" blank.



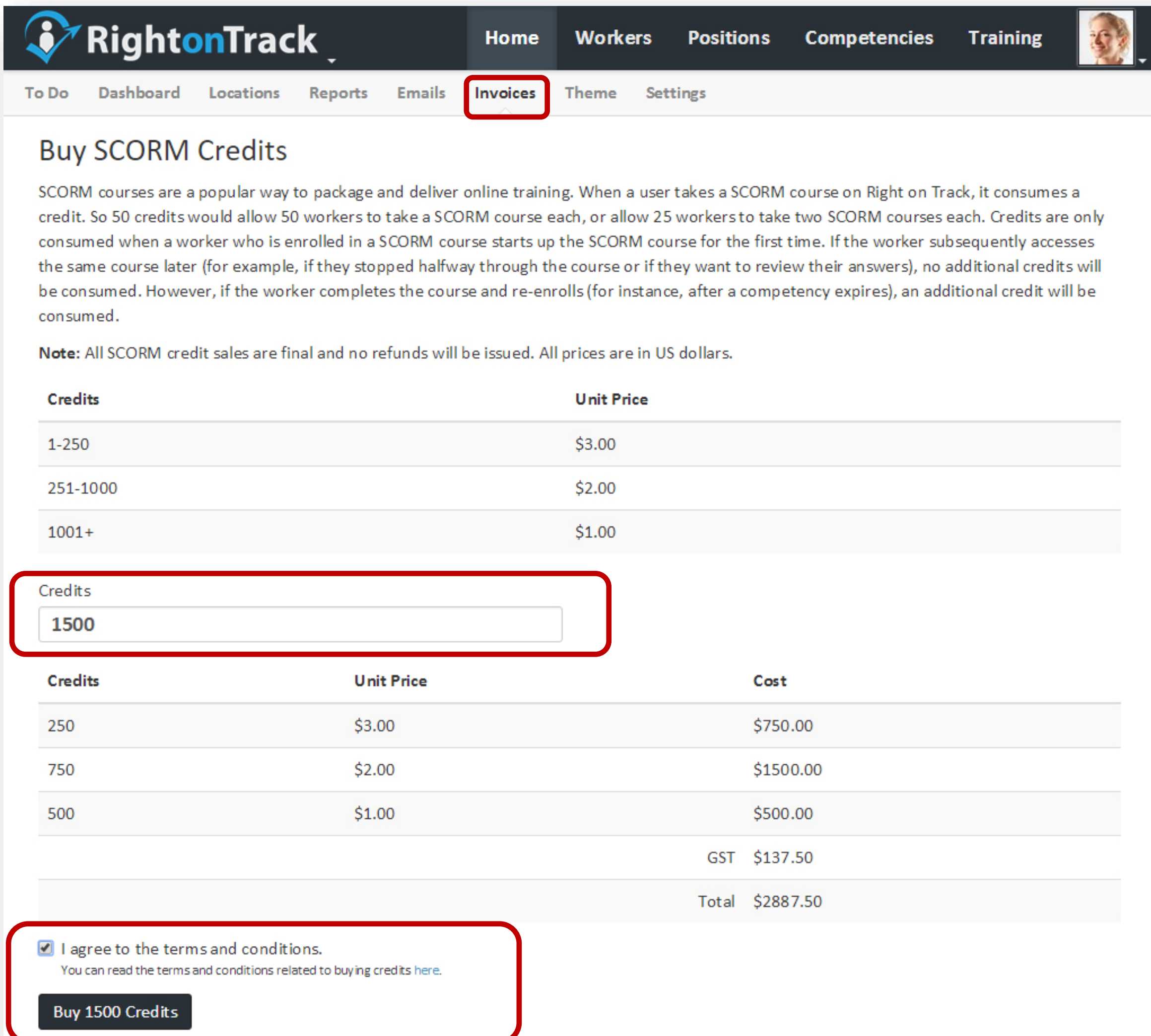
Purchase Credits for Online (SCORM) Courses

SCORM courses are a popular way to package and deliver online training. When a user takes a SCORM course via Right on Track, it consumes one credit. Credits are only consumed when a worker who is enrolled in a SCORM course starts up the SCORM course for the first time. If the worker subsequently accesses the same course later (for example, if they stopped halfway through the course), no additional credits will be consumed. If a worker completes a course then enrolls in it again (for example, if a safety competency expires), an additional credit will be consumed.

Important: SCORM credits must be purchased in advance, before a user may take a SCORM course. SCORM credit purchases are billed immediately, and there are no refunds. SCORM credits never expire. **All prices are in U.S. dollars.** Prices are subject to change.

To purchase credits, click on the **"Home"** tab, then choose the **"Invoices"** submenu tab. Click on **"Buy SCORM Credits"**. Enter the number of credits you wish to purchase. Check the box to state that you agree to the terms and conditions, then click on the **"Buy # Credits"** button.

Note: The incremental unit price per credit decreases at 250, and again at 750. For example, if you purchase 1500 credits at once, the first 250 are billed at $3 each ($750), the next 720 are billed at $2 each ($1500), and the final 500 are billed at $1 each ($500), for a total of $2750 before taxes.

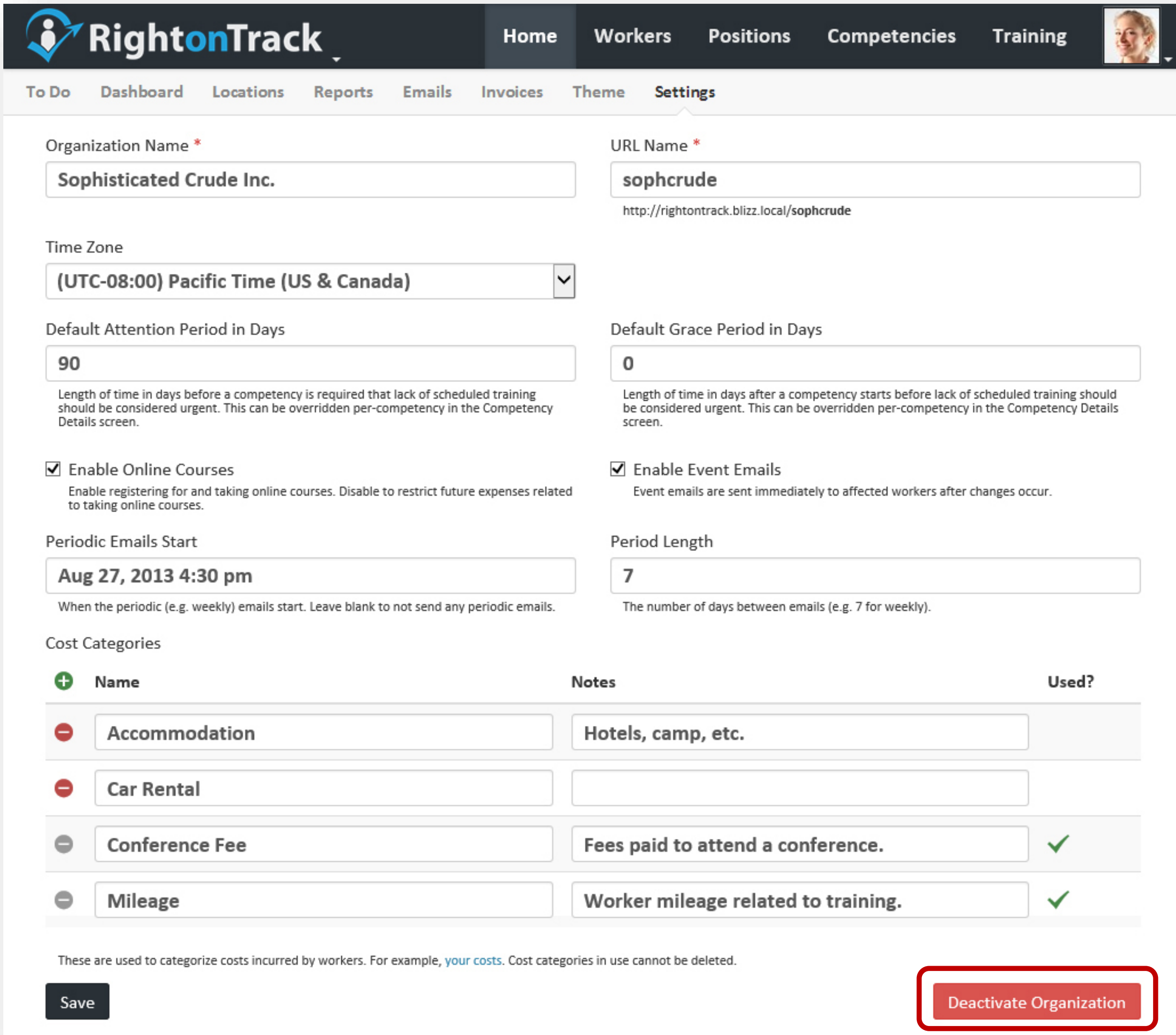


Deactivate Organization

Click on the **"Home"** tab, then click on the **"Settings"** submenu tab.

Click on **"Deactivate Organization"** to cancel your account. Your current month will be billed, then the account will be suspended. If you make a mistake, you have up to six months to reactivate your account, after that your information will be deleted forever.

See also: Create, Deactivate, Reactivate, or Delete an Organization



Edit Organization Settings and Cost Categories

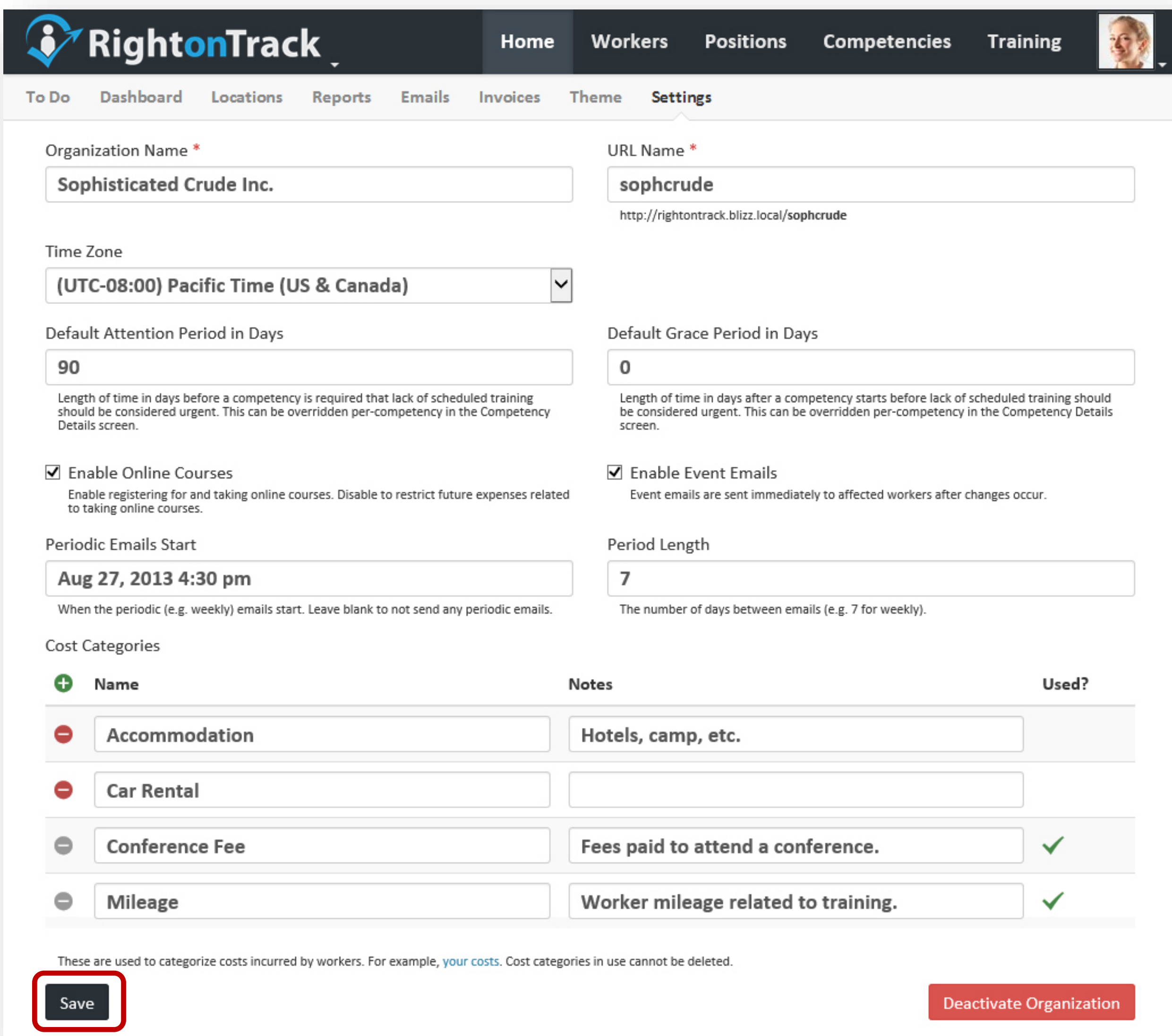
Click on the **"Home"** tab, then click on the **"Settings"** submenu tab.

On this page, you can edit the organization name, URL name, time zone, and email notification settings.

From this page, you can also set the default attention period and default grace period for the organization.

Check "Enable Online Courses" if you want to allow people to take online (SCORM) courses. Note that you must purchase SCORM credits in advance before workers can enroll in online courses.

Cost categories are used when recording worker or classroom course expenses. Click on the **"Add a new one."** link to add the first cost category. Press the button to add additional cost categories, or press a button to remove one. When finished, press the **"Save"** button to save your changes.



What is the Grace Period for a competency?

The grace period determines when a specific competency is required in relation to a position start date.

After the grace period has elapsed, the competency will be colored “red” (expired/incomplete) in reports, on the worker’s competencies screen, and on the worker's timeline. At this point, the competency will be included in notification emails to the worker and to the supervisor.

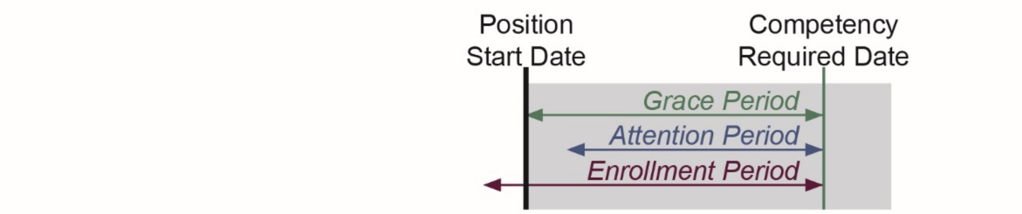
What is the Attention Period for a competency?

The attention period determines the date at which workers start to be prompted about an upcoming competency requirement (either for an upcoming position, or for a competency that is about to expire).

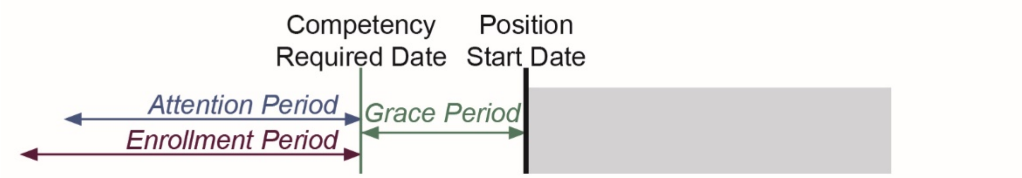
When the attention period starts, the competency will be colored “orange” (attention required) in reports and on the worker‘s competency screen. At this point, the competency will be included in notification emails to the worker and to the supervisor. The attention period has no effect on the worker's timeline.

Grace Period and Attention Period Diagrams

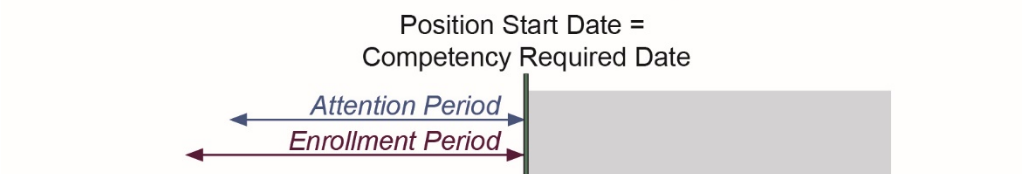
The competency is required after the position starts (Grace Period is Positive):



The competency is required before the position starts (Grace Period is Negative):



The competency is required when the position starts (Grace Period = 0):



Note: The grace period and the attention period can be set for the entire organization, for a specific competency, or for a specific position/competency combination. The more specific settings (position/competency) override the less specific settings (organization default).

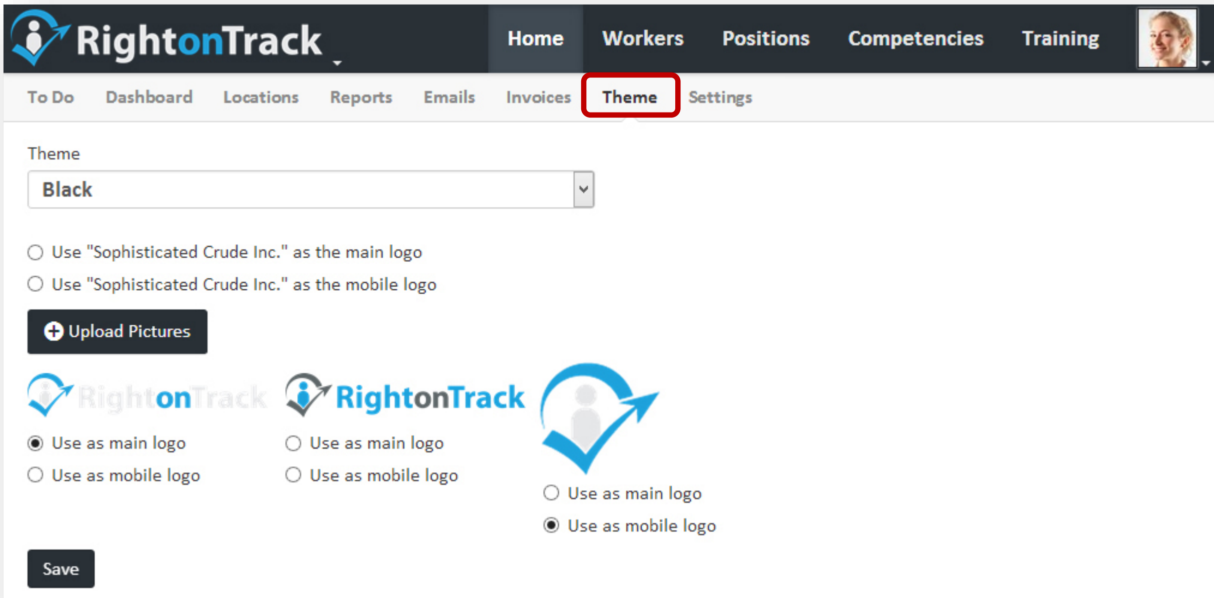
Customize the Theme and Logo

Click on the **"Home"** tab, then click on the **"Theme"** submenu tab.

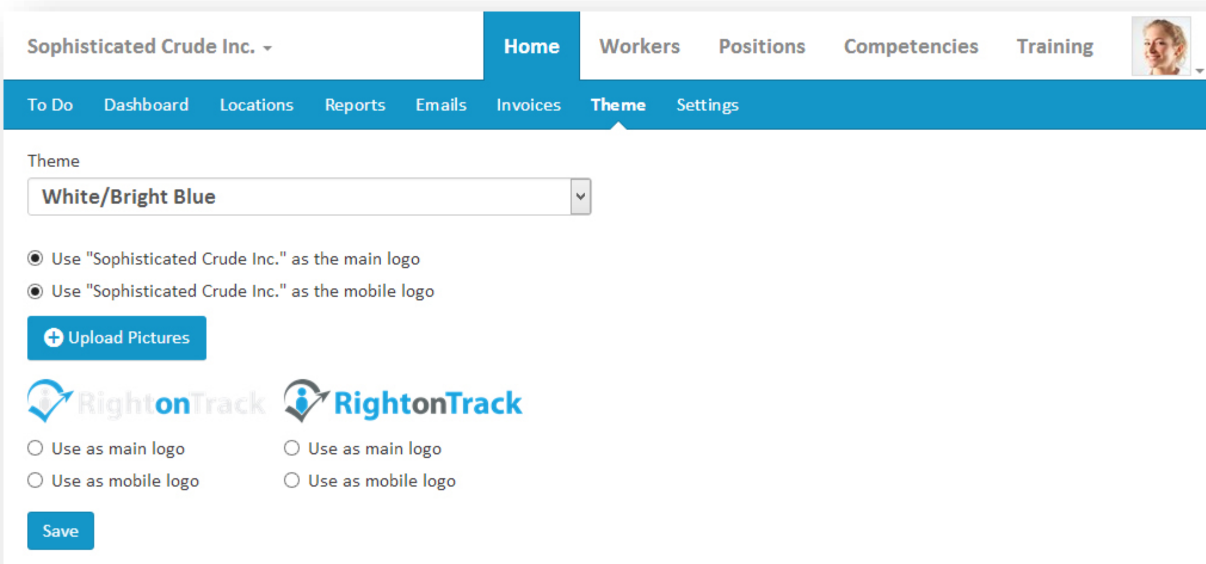
Select a color theme that is compatible with your logo from the drop down menu. In addition to the solid-color menu backgrounds, there are several color combinations that pair a white menu background with an accent color.

Note: Logos must be in Portable Network Graphics (.png) format.

In the example below, the logo for a black background is used and the black color theme is shown.

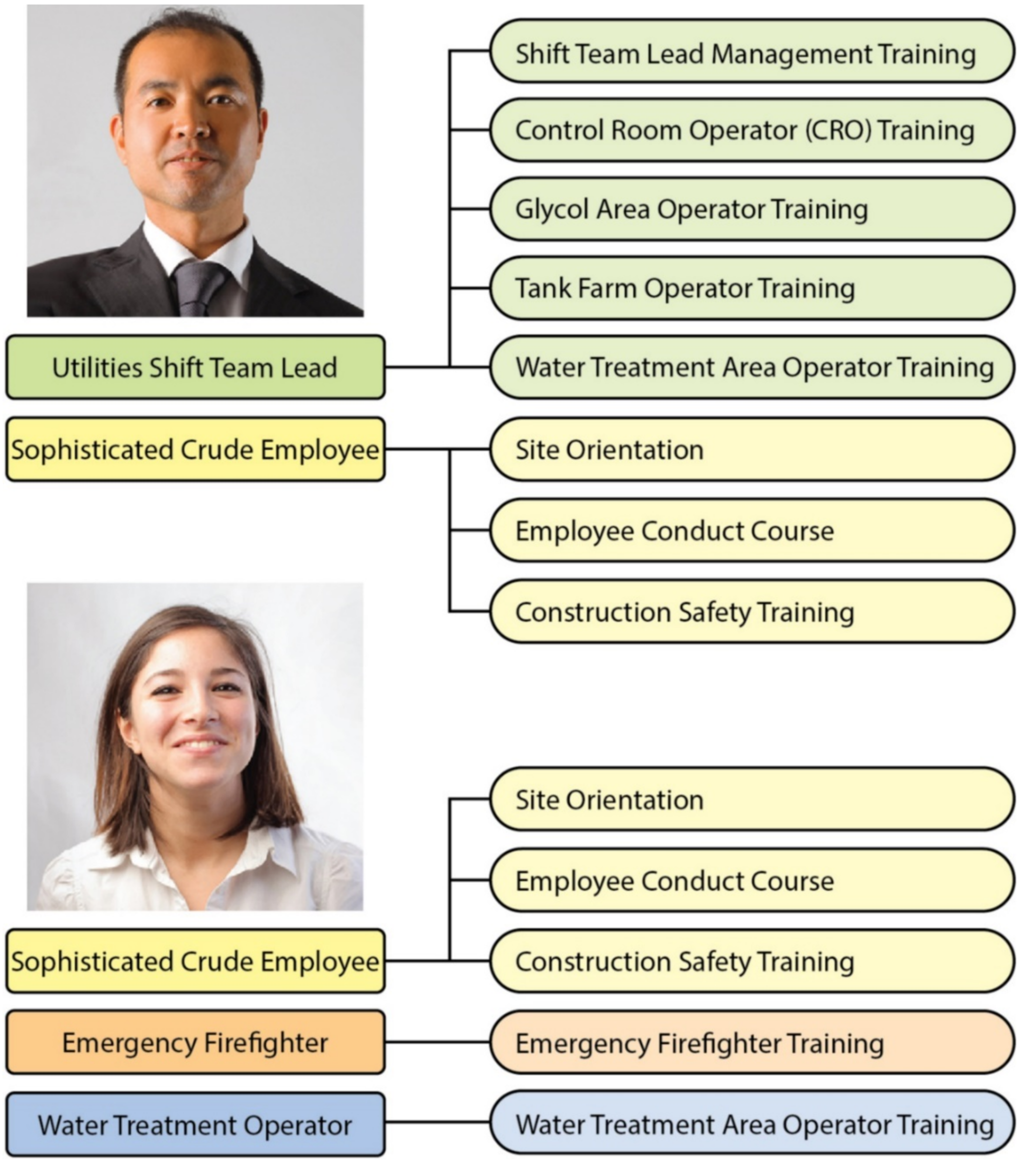


In the example below, the organization name is used instead of a logo, and the white/blue color theme is shown.



What is a position?

A position is a specific job title (e.g. Sophisticated Crude Employee, Utilities Shift Team Lead, Emergency Firefighter, Water Treatment Operator, Area Fire Warden, Main Gate Security Person, Utilities Building Janitor, VP of Operations, etc.). Each position has a set of **required competencies.**



Any two people with the same position are interchangeable cogs, with respect to that position. For example, any water treatment operator should be able to fill in for any other water treatment operator. If two people with the same position are not interchangeable, the two positions should have different names. For example, the "Shift Team Lead" for utilities is not interchangeable with the "Shift Team Lead" at the mine. Instead, there should be two distinct positions: "Utilities Shift Team Lead" and "Mine Shift Team Lead".

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A worker can have one or more positions. For instance, Jane might be a "Water Treatment Operator", a "Sophisticated Crude Employee", and also be on the volunteer emergency firefighting team as an "Emergency Firefighter". Each of these positions requires a different set of competencies, though some may overlap, such as multiple positions requiring first aid.

Positions can be **effective-dated.** This allows you to plan for worker progression and succession. For instance, Jane could be promoted from "Water Treatment Operator" to "Lead Hand" in 6 months when the current lead hand retires.

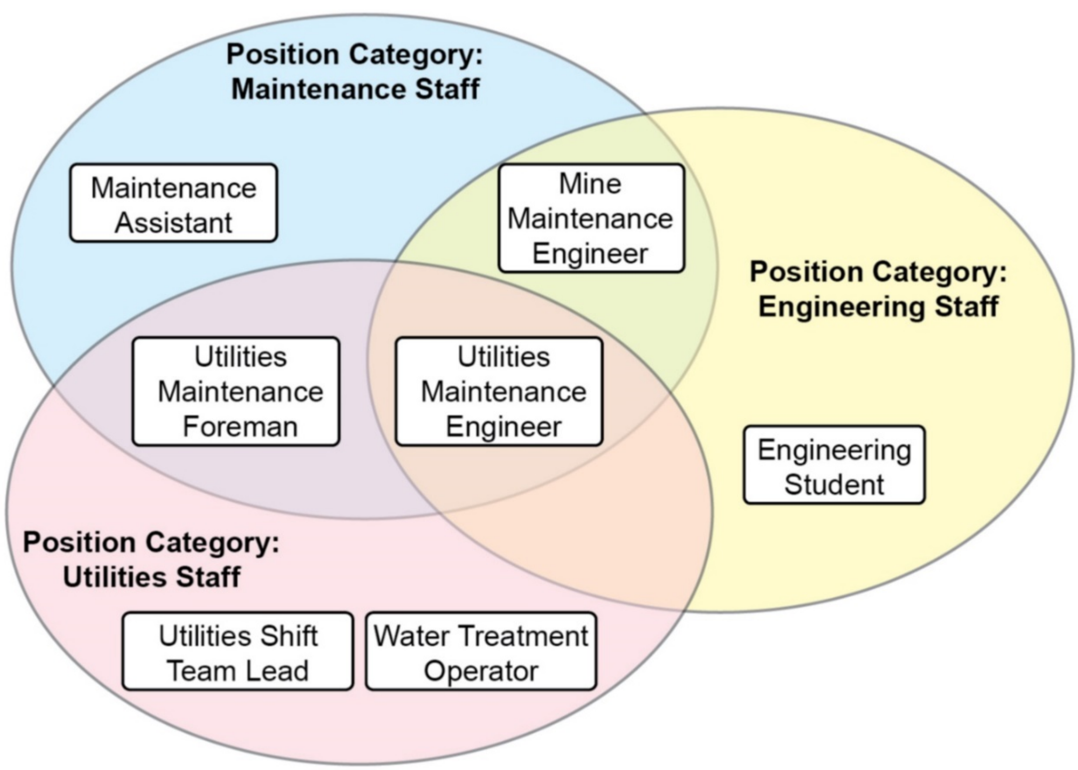
As the start date of the each promotion approaches, the competencies which are required for the new position will increase in urgency, and the competencies which are no longer required will disappear from the worker competency page.

What is a position category?

A position category is a way of grouping positions to make reporting and organization easier. Positions can belong to multiple categories. For instance, the "Utilities Maintenance Engineer" could belong to the "Maintenance Staff" category, the "Engineering Staff" category, and the "Utilities Staff" category.

Some positions will only belong to one category, both others will belong to multiple categories. Some categories may be subcategories of other categories. For example, "Mechanics" could be a subcategory of "Maintenance Staff".

When deciding which categories to make, think about your reporting requirements. Groups of positions that require frequent reporting, such as weekly safety training reports, should be placed together in a position category.



What is a competency?

A competency is a training task or assessment that must be completed. Some competencies (e.g., area-specific training, site orientation) may only need to be completed once. Some competencies (e.g. First Aid, WHMIS, and Fall Protection) will expire after a set period of time and will have to be completed again before they expire.

What is a competency category?

A position category is a way of grouping competencies to make reporting and organization easier. For example, mandatory safety training (e.g. WHMIS, Fall Protection, First Aid, Safe Work Practice, and Transportation of Dangerous Goods) could be grouped together in a category so that it would be easy to generate weekly safety reports. Operator training (e.g. Pump Training, Valve Training, and Troubleshooting Procedures) could be another competency category.

Note: Competencies can belong to multiple categories.

How can a worker complete a competency?

In Right on Track, there are three ways for a worker to create a competency:

- **Classroom Course:** This is a physical classroom course offered by the company. The results must be manually entered by the instructor or trainer after the course.

- **Online (SCORM) Course:** This is an industry-standard format for online courses. The results are automatically recorded.

- **Training Activity:** This includes all other training, such as third-party classes, third-party online courses, demonstrating an SOP to a trainer, completing a go-find lists, completing simulator training, hard copy training workbooks, hard-copy exams, reading a textbook or training manual, performing a respirator fit test, etc. The results must be manually entered by the instructor or trainer after the training is complete.

Note: Right on Track allows the trainer to set deadline dates for online courses or training activities.

What does "No available training methods." mean?

This means that there is no available method for the worker to complete this competency. To remedy this, add a training activity, create an online course, or schedule a classroom course for this competency.

What is SCORM?

SCORM (Sharable Content Object Reference Model) is an e-learning package specification. SCORM-compliant modules can be used in any SCORM-compliant LMS (Learning Management System). This interoperability allows you to easily migrate your content when you switch between learning management systems. SCORM modules can contain interactive quizzes, videos, animations, etc.

Can I upload my files to your website?

Yes. You can upload files for a training activity or a worker so that they will be stored on our server, up to a maximum of **1 GB** per worker. Please contact us if you require additional storage.

To upload files for a training activity (e.g. SOPs, training videos, sequence of event charts, shutdown keys, vendor manuals, etc.), attach the file to the training activity.

To upload files for a worker (e.g. copies of training certificates), attach the file to the worker.

Can I link to my files on my intranet, or on the internet?

Yes, you can link to content on your intranet. You can also link to files or websites on the internet. This is especially useful if there are files on your system that change frequently (such as standard operating procedures), since you won't need to update the files in a second location.

Note: Workers will only be able to access files on your intranet while they are connected to your intranet.

To link to files for a training activity (e.g. SOPs, training videos, sequence of event charts, shutdown keys, vendor manuals, etc.), reference the file for the training activity.

To link to files for a worker (e.g. copies of training certificates), reference the file for the worker.

Can I stream videos?

Yes. Video files can be streamed in-browser if you upload them in **MP4 / h.264 format.** Other video formats will have to be downloaded before playing.

Once the video is in the correct format, simply attach the video training file to a Training Activity.

Do I have to upload online training (SCORM) files to play them?

Yes. You must upload online (SCORM) files in order to play them. SCORM files cannot be stored on your intranet.

How does archiving work?

When there is associated information with an item, it cannot be deleted until the associated information is deleted. Instead, we recommend that you "archive" these items to preserve this data for historical reports or reference later on. To reinstate an archived item, uncheck the "Archived" checkbox on the details or settings page for the item.

Important: When reinstating an archived worker, you will need to manually reset the position end dates, future positions, and workers that report to this worker.

Item Name	Cannot be deleted if...	What are the effects of archiving?
Worker	-Workers report directly to this worker. -This worker has any training activity enrollments. -This worker has any classroom course enrollments. -This worker has any online (SCORM) course enrollments. -This worker has any competency records. -This worker has any associated cost records.	-All current positions are **end-dated** as of today's date. -All future positions are **removed.** -Any workers that report to this worker are **moved up the organization chart** so that they report to this worker's supervisor instead. -This worker's information still shows up in historical reports, and past training data is retained. -This worker will not show up on the "Workers" page unless you explicitly search for him or her by name.
Competency	-This competency has any associated training activities. -This competency has any associated classroom courses. -This competency has any associated online (SCORM) course enrollments. -This competency has any associated worker competency records.	-This competency cannot be associated with any new training. -This competency will no longer show up as an option on competency drop-down boxes. -This competency does not show up on the list of competencies unless you explicitly search for it by name. It also shows up under the "Archived" competencies category.
Training Activity	-This training activity has any worker enrollments.	-No new worker enrollments can occur. -The training activity will no longer show up on the list of available training unless you explicitly search for it by name.

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Item Name	Cannot be deleted if...	What are the effects of archiving?
Classroom Course	-This classroom course has any scheduled classes.	-No new worker enrollments can occur. -No new scheduled courses can be created for this classroom course. -The classroom course will no longer show up on the list of available training unless you explicitly search for it by name.
Online (SCORM) Course	-This online course has any worker enrollments.	-No new worker enrollments can occur. -The online course will no longer show up on the list of available training unless you explicitly search for it by name.
Location	-This location has any associated training events.	The location can no longer be chosen as an event location and does not show up on the list of locations unless searched for.

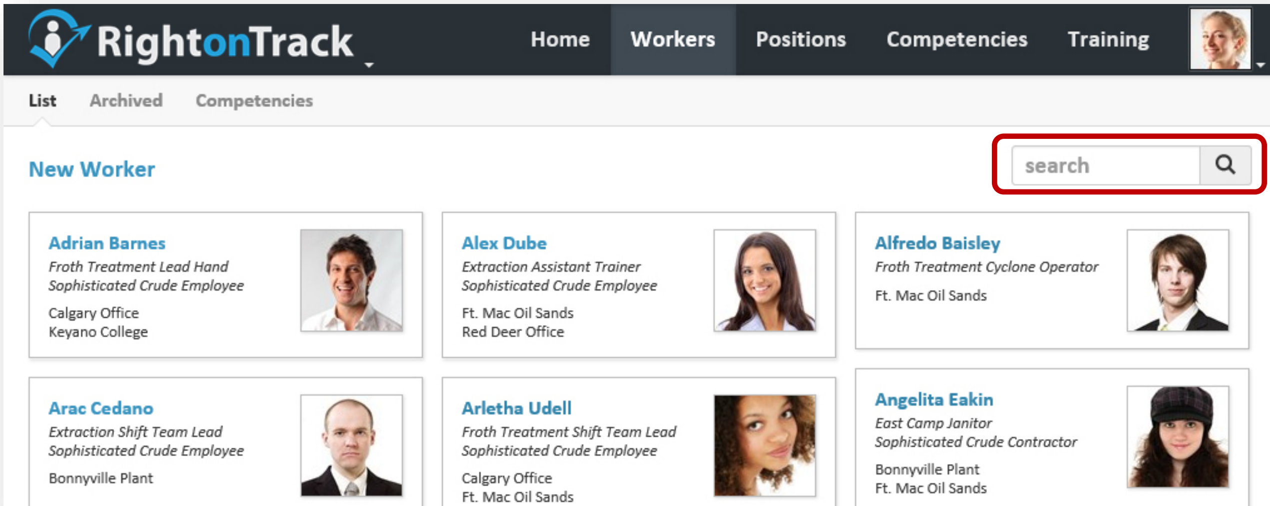
Note: When a worker does not have any current or future positions during the month, the worker is not included in the total count for billing purposes.

Archiving hides an item from the search screen unless you explicitly search for it by name. The archived positions will show up under the "Archived" position category. The archived competencies will show up under the "Archived" competency category.

Find a Worker

Click on the **"Workers"** tab. Click the **search bar** and begin to type information about the worker (i.e. first name, last name, position, location). The search bar will filter the workers as you type.

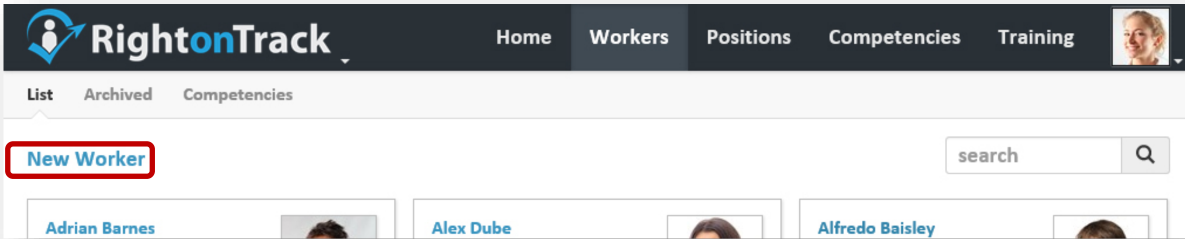
Click on the worker's name to view additional details.



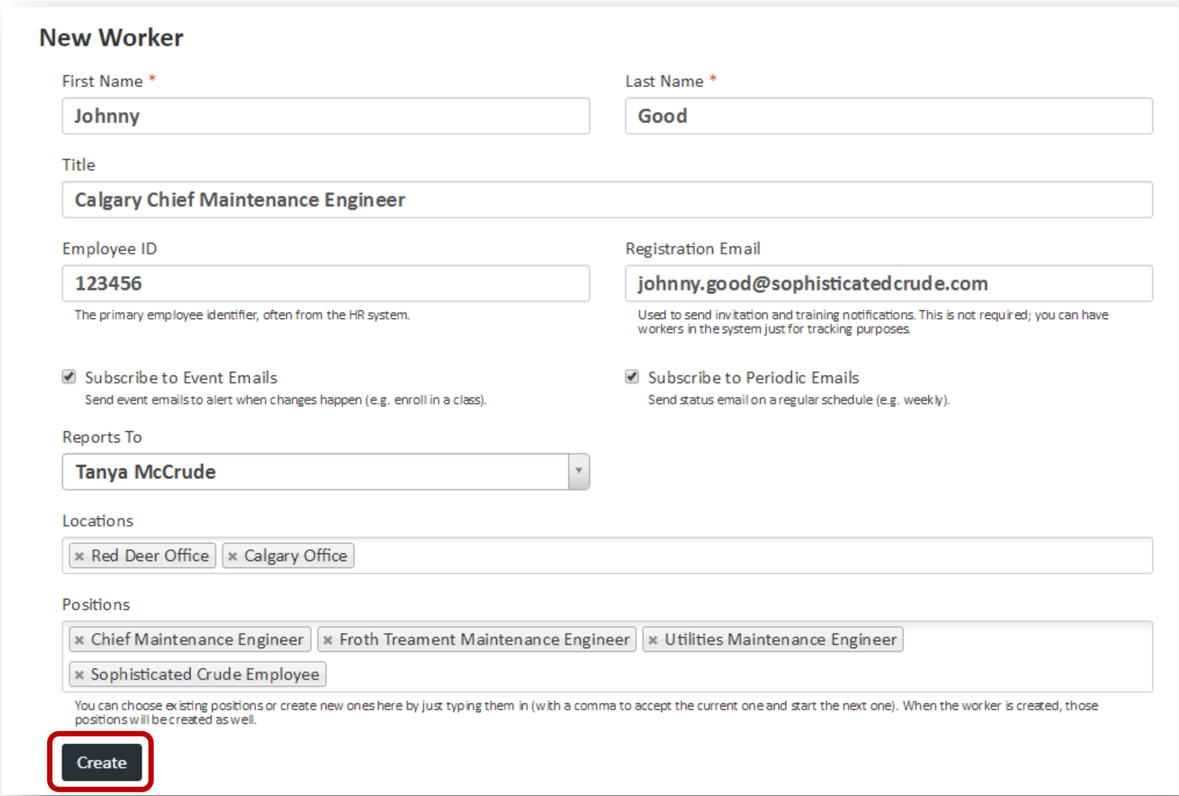
Note: Archived workers are listed under the **"Archived"** submenu tab.

Create a New Worker

Click on the **"Workers"** tab. Click on the **"New Worker"** link.

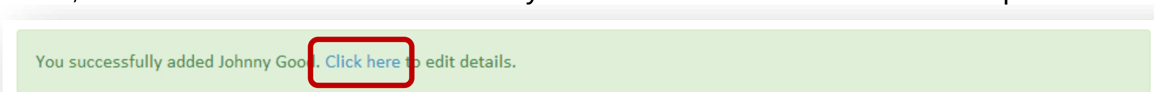


Enter the first name and last name for the new worker. Optionally, you may also enter a job title and employee ID on this page. A registration email address is required before the worker may log in or receive notification emails. Select the checkboxes to subscribe this worker to event emails and periodic status emails. Select the worker to whom this worker reports. Enter one or more locations for this worker (if desired).



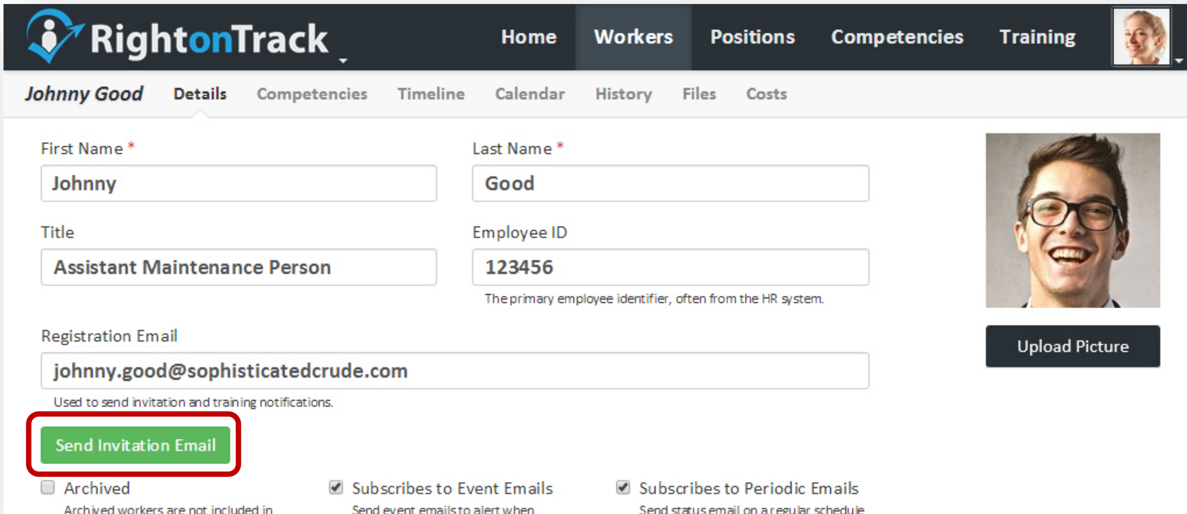
In the positions box, type in the name of one or more positions for this worker. As you type, you may select an existing position from the list displayed. To add new positions for this worker, type the names of the positions, separated by commas.

Press the **"Create"** button. Once the worker has been created, you may create another new worker, or click on the link to edit the newly created worker's details and add a photo.

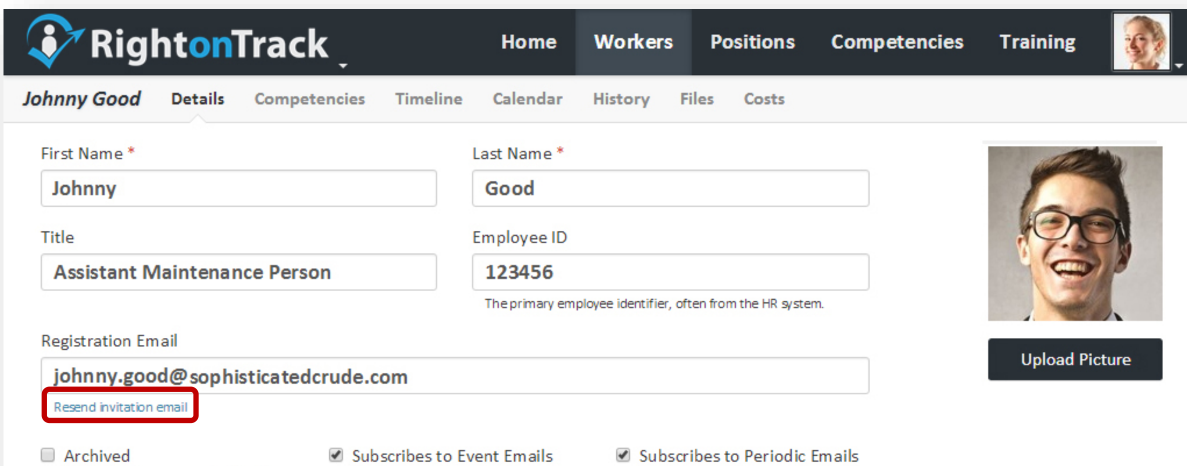


Send (or Resend) an Email Invite to a Worker

Find the worker, then click on the **"Details"** tab for the worker. Click on the **"Send Invitation Email"** button to send the invitation email to the user.

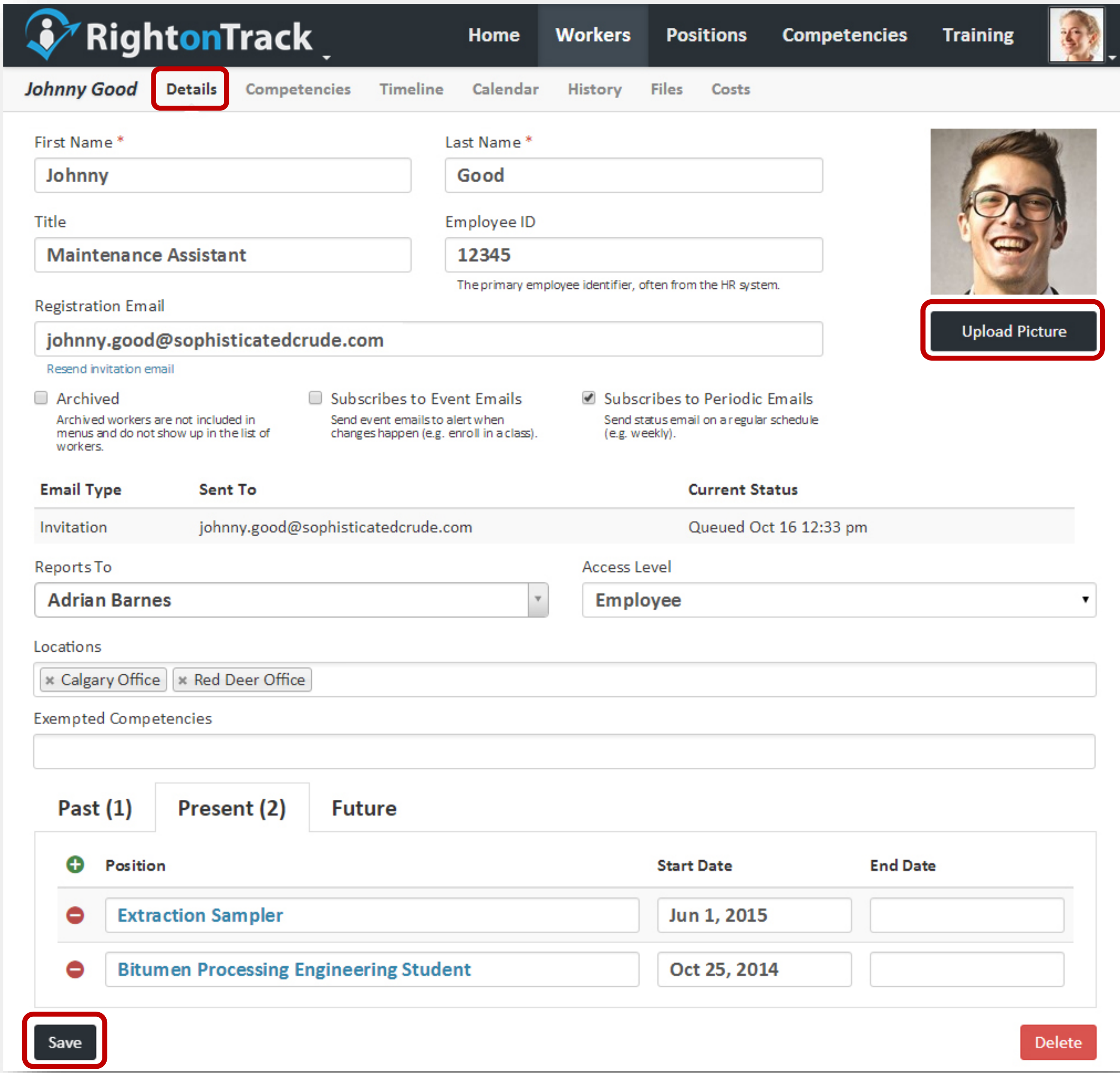


If you need to resend an invitation (for example, if an email address has been updated), click on the **"Resend Invitation Email"** link.



Edit Worker Details

Find the worker, then click on the **"Details"** tab for the worker. Change the worker details as desired. Upload a picture for the worker by pressing the **"Upload Picture"** button and selecting the picture file. When finished, click the **"Save"** button to save your changes.



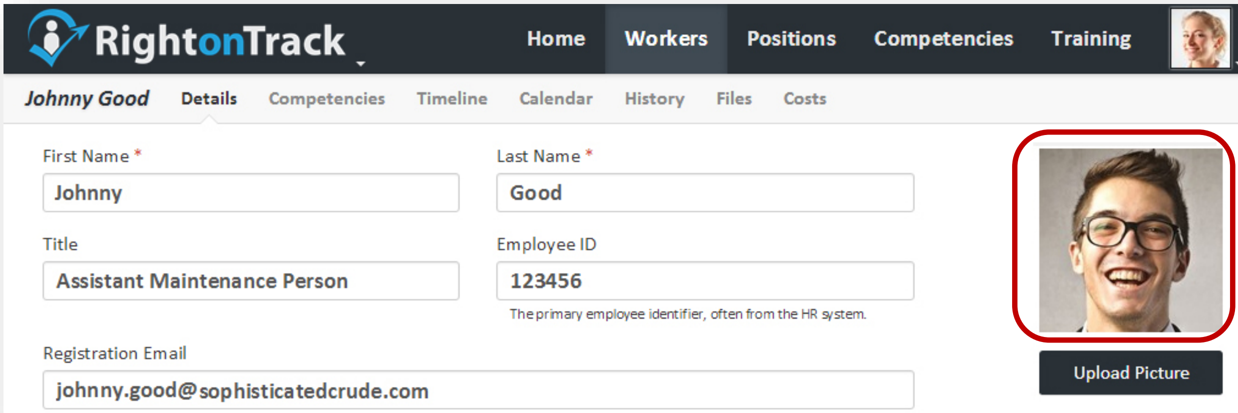
Notes:

- **Event Emails** notify the worker when an event happens (e.g. a course enrollment).
- **Periodic Emails** are sent to the worker on a regular basis to notify them of their competency status (e.g. expiring competency and upcoming training deadlines).
- **Access Level** is the level of access this worker has inside the Right On Track system.
- **Reports To** is the worker that this worker reports to within the organization chart.
- **Employee ID** is the organization's identifier for the worker.
- **Locations** are the areas where the worker is normally located. Each worker can have multiple locations.
- **Exempted Competencies** are competencies that are not required for this specific worker.

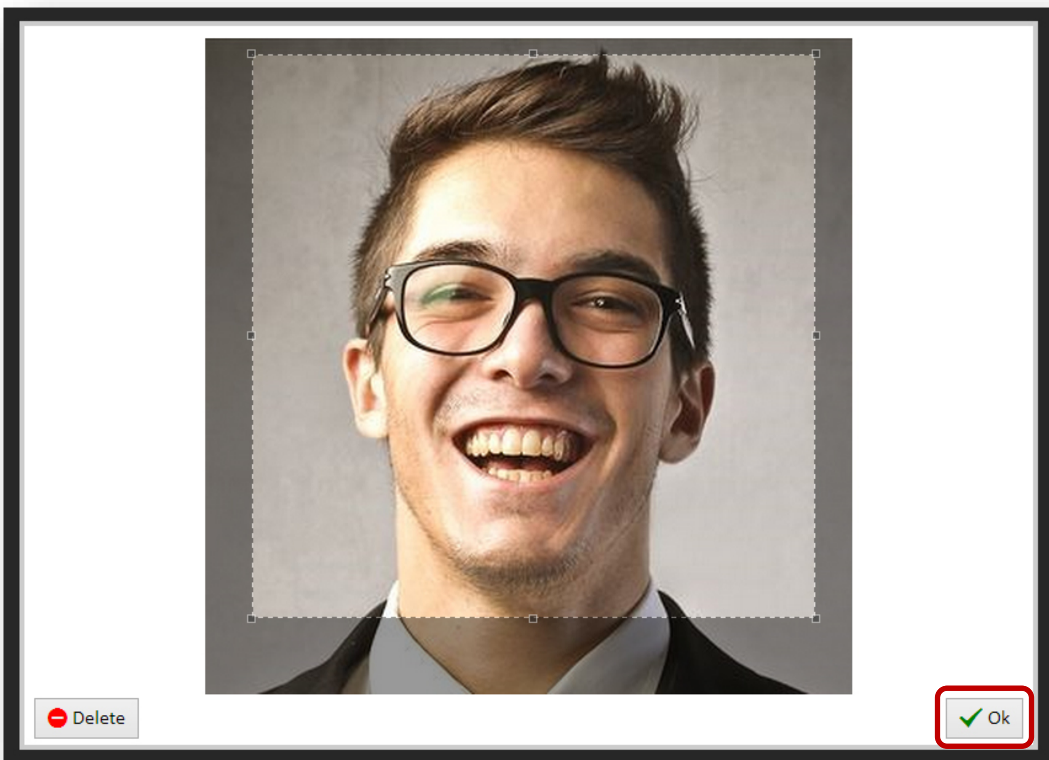
Crop a Worker Picture

Note: Cropping only affects how the picture is displayed; the original picture is not modified. The aspect ratio for the image crop box is locked to maintain layout consistency.

Click on the **"Details"** tab for the worker. Click on the picture to open the edit page.



On the opened photo, click and drag to draw a crop box. Resize the box by dragging the box endpoints in or out. Adjust the box position by dragging the box to the desired location on the photo. Click outside of the crop box to remove the cropping. When finished, click the **"Ok"** button to save.

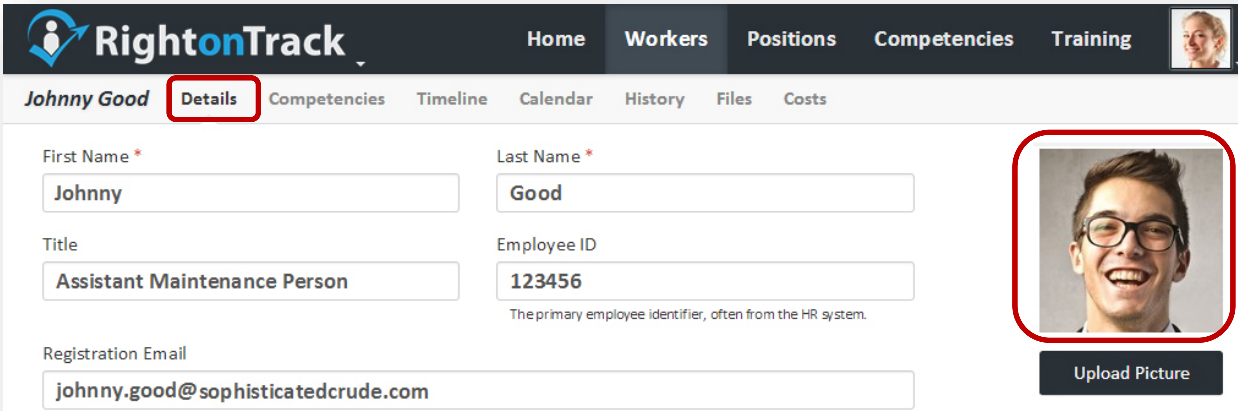


Worker Picture File Requirements

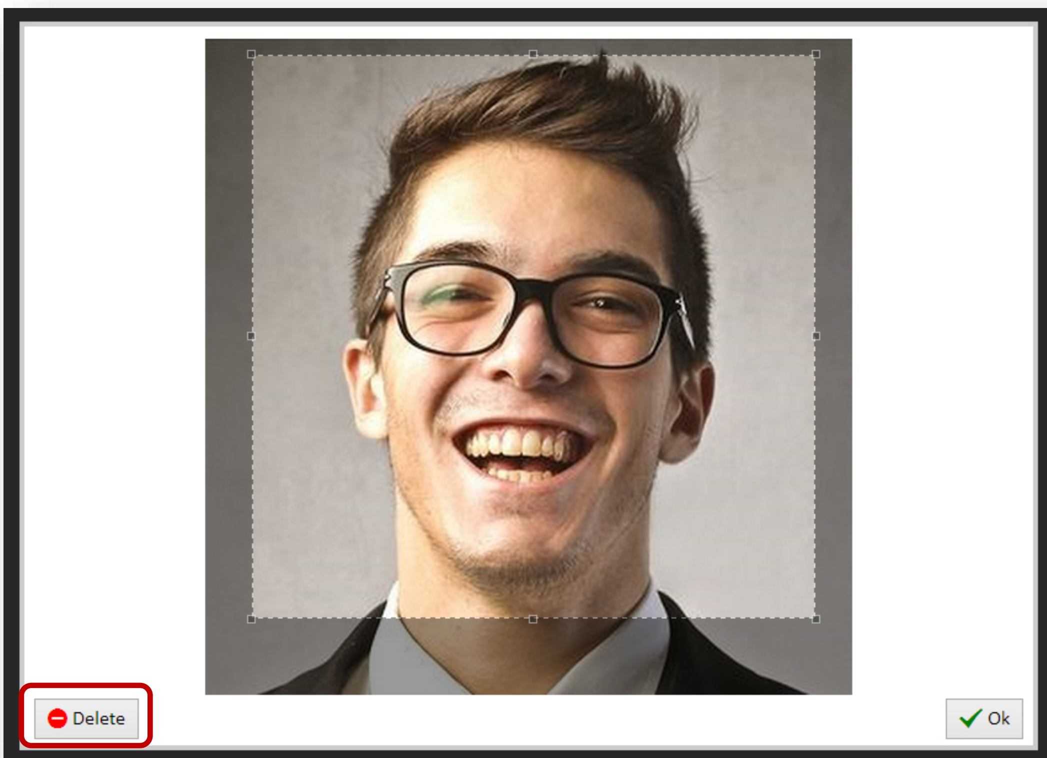
Pictures files must be in JPEG format. The maximum allowed size for each file is **8 MB**. Uploaded images are scaled down to a maximum dimension size of **2048px**.

Delete a Worker Picture

Click on the **"Details"** tab for the worker. Click on the picture to open the edit page.



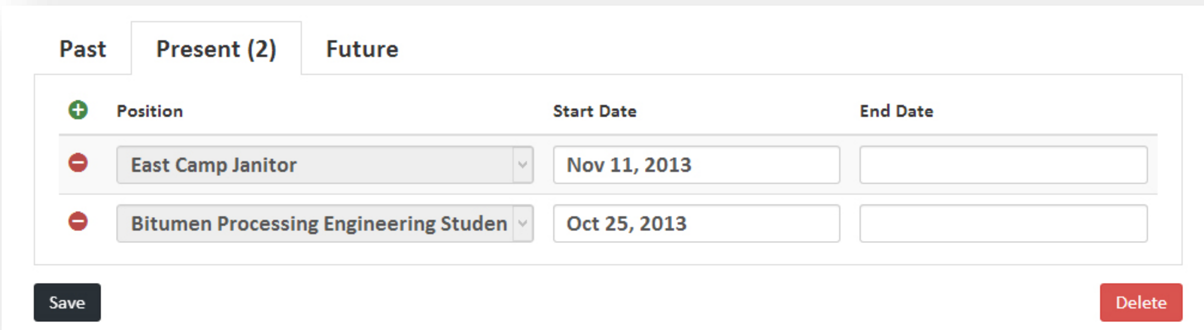
Press the **"Delete"** button in the lower left hand corner.



Edit Worker Positions

Click on the **"Workers"** tab. Search to find a worker, then click on the worker name to open the **"Details"** tab for the worker. The positions are listed near the bottom of the page. Press the button to add a position to this worker, or the button to remove a position from this worker.

Note: Do not delete past positions; give them an end date instead. When you change the start and end dates of a position, it will automatically move to the past, present, or future tab based on the new dates.



A **past position** can have a fixed start date in the past or no start date. It will always have an end date in the past. Workers with **only** past positions are **not counted** as "active" for billing purposes.

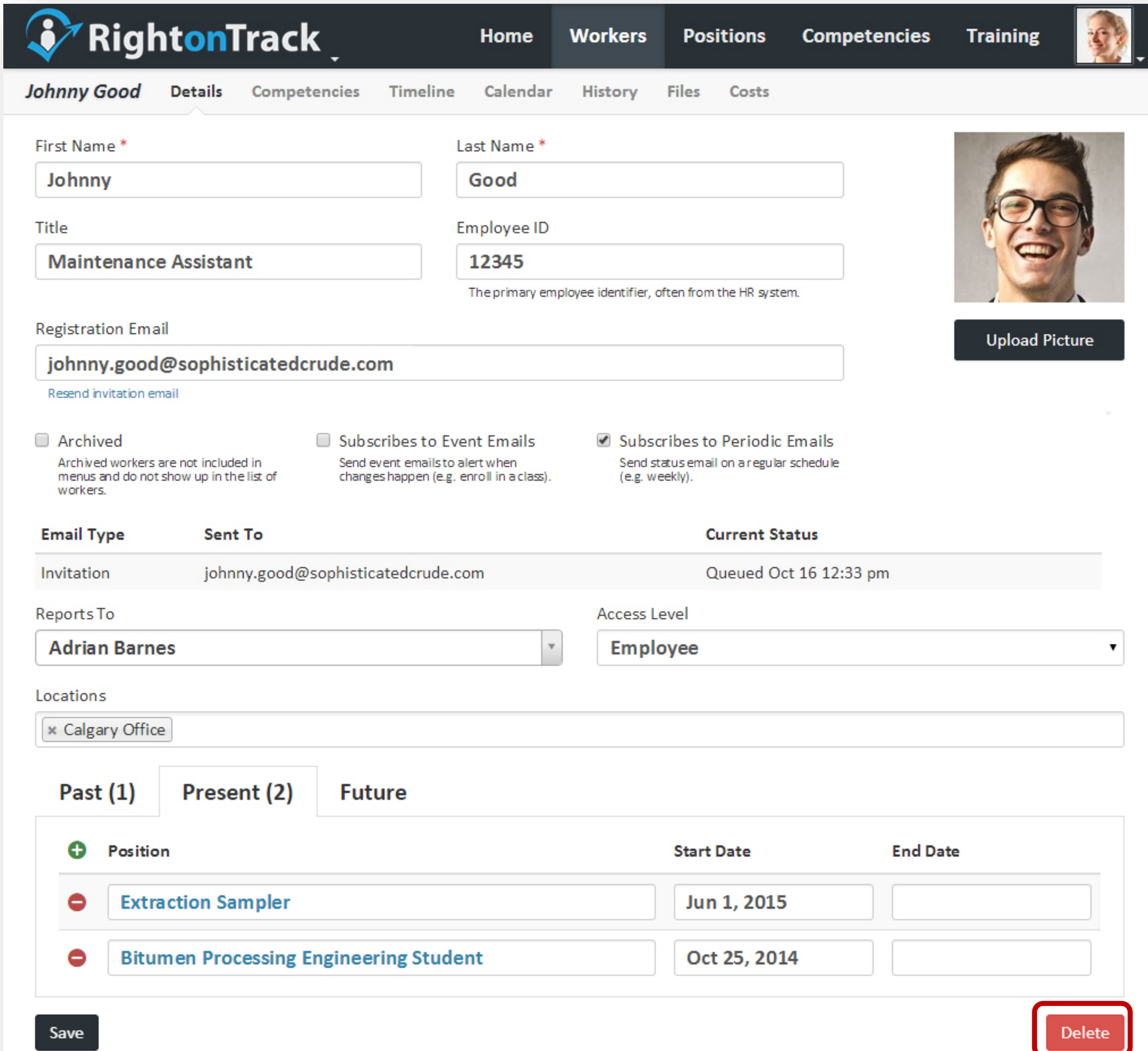
A **present position** will always have a start date in the past. It can have a fixed end date in the future or no end date. Workers with present positions are counted as "active" for billing purposes.

A **future position** will always have a start date in the future. It can have an end date in the future or no end date. Future positions can be used for succession planning. Workers with future positions are counted as "active" for billing purposes.

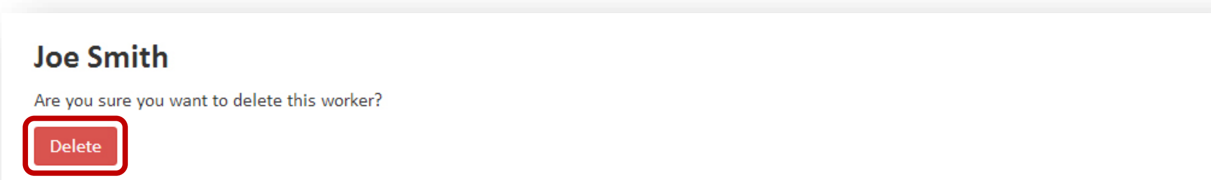
Delete or Archive a Worker

Click on the **"Workers"** tab. Search to find the worker you wish to delete, then click on the worker name to open the **"Details"** tab for the worker.

Press the **"Delete"** button at the bottom right side of the page to delete the worker.



When prompted, press the **"Delete"** button to confirm.



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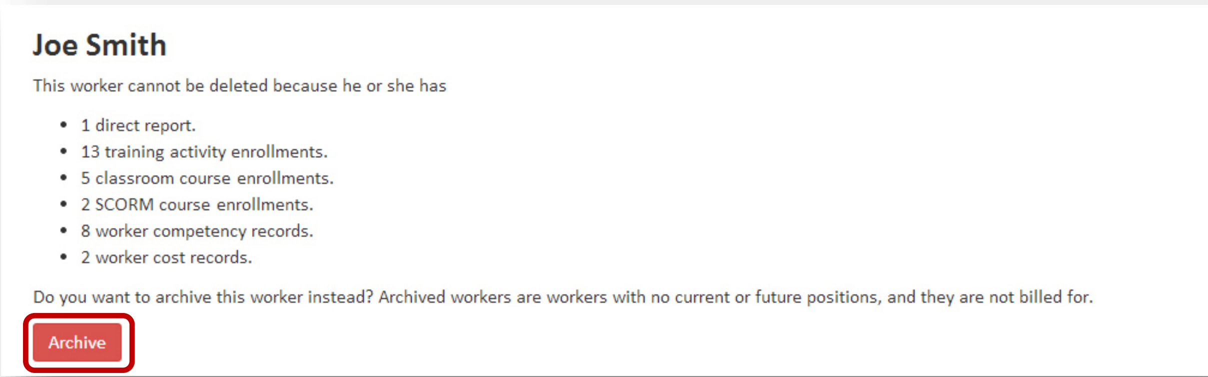
Note: You cannot delete a worker that has completed training. Instead, pressing the delete button in this case will prompt you to "archive" the worker.

Caution: Archiving a worker sets all their positions to past positions. Archiving will also disconnect any workers who report to this worker and move them up the organization chart so they report to this worker's supervisor. This information will be permanently lost – the position end dates and organization chart position **will need to be manually reset**, even if the archived worker is reinstated.

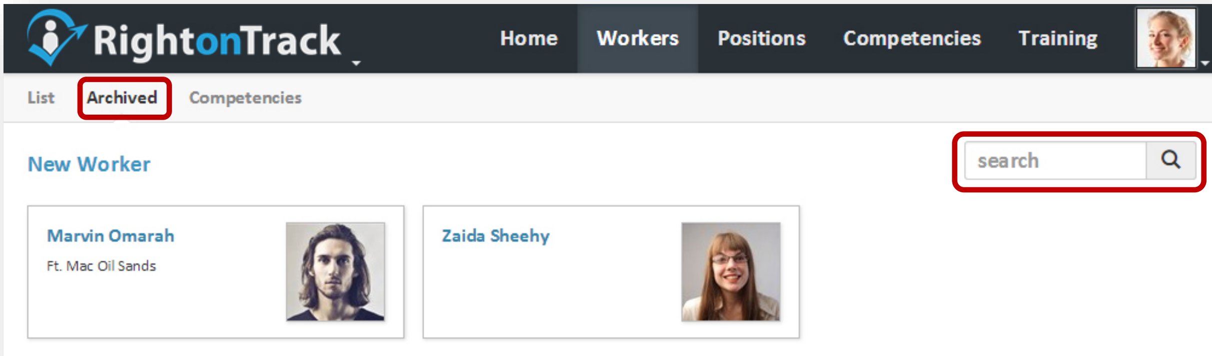
When prompted, press the **"Archive"** button to archive the worker. Alternatively, you can archive a worker by checking the **"Archived"** checkbox on the worker details page. See Archiving for more information.



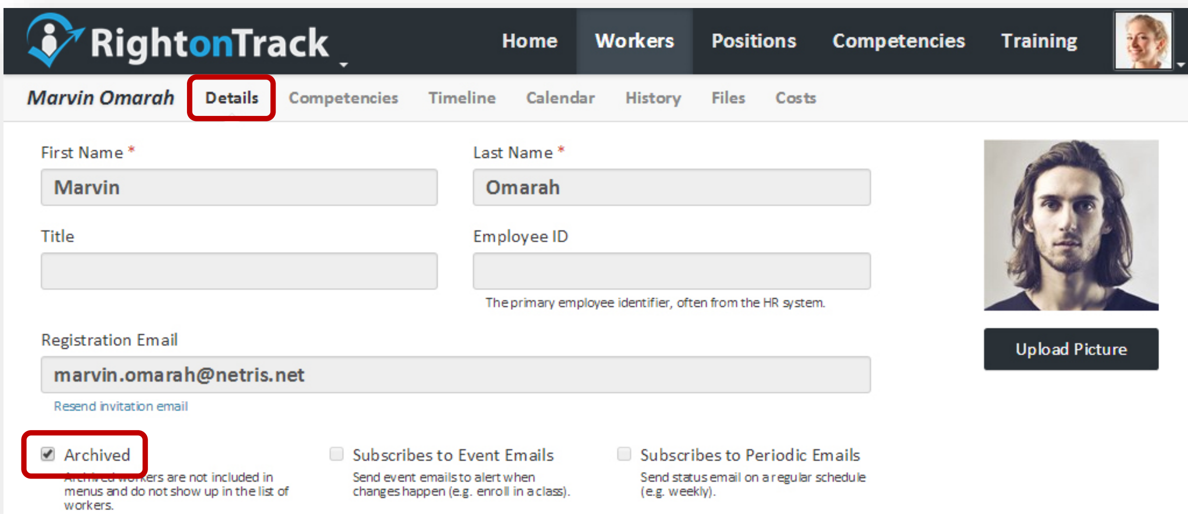
Note: You will not be billed for workers while they are archived (i.e., while they do not have any present or future positions). This allows you to retain past worker records and create historical reports.

Reinstate an Archived Worker

Click on the **"Workers"** tab. Click on the **"Archived"** submenu tab to display the archived positions. Search to find the archived worker, then click on the worker name to bring up the **"Details"** tab for the archived worker.



Uncheck the **"Archived"** checkbox to reinstate the archived worker. When finished, click the **"Save"** button to save your changes.

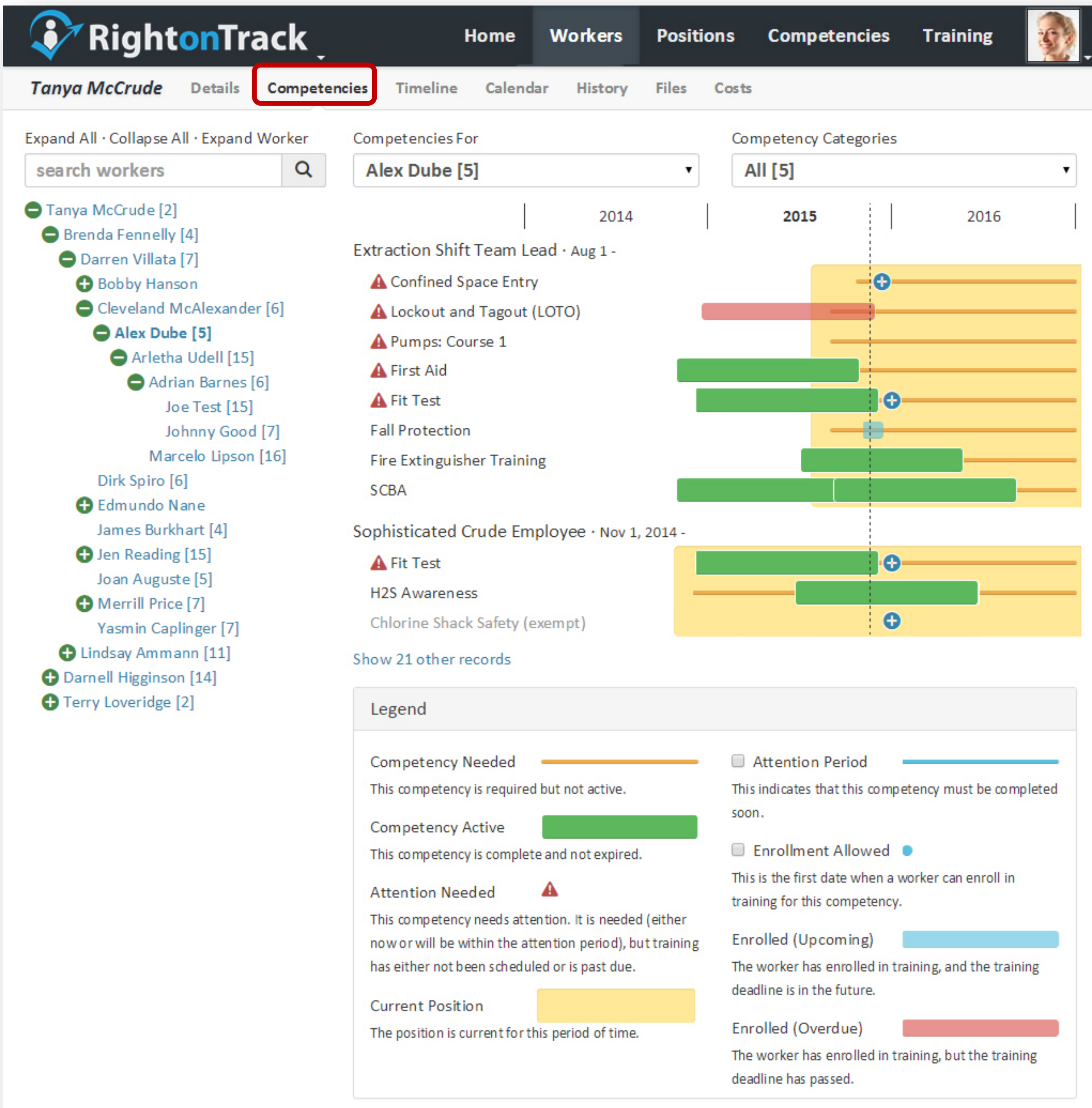


Enroll in Training / View Competency Status

Search to find a worker, then click on the worker name. Click on the **"Competencies"** tab for the worker. From this page, you can view the worker's competencies or the competencies of the workers below him.

The left panel shows your workers, organized into a vertical organization chart. Click on a worker's name to display their competencies. You may also filter by worker and by competency category using the dropdown menus at the top of the page.

To enroll a worker in training, click the **"Enroll" (⊕)** button for the competency, and the available training options will be displayed. If there is no **"Enroll"** button on a needed competency, it means that there are no available training methods. Click on a **green bar** to view the details for a completed competency. Click on a **blue bar** or **red bar** to view the details for an enrollment. The legend at the bottom of the page explains the color coding.



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Note: This page is similar to the timeline page, except that it can be used to enroll the worker in training and it only shows a three-year time range. The timeline at the top of the screen shows the dates, with the current year in **bold** text. The vertical dashed line indicates today's date.

In the left panel, the number after the worker's name indicates the number of competencies that require attention for that worker. Click on "Show # other records." at the bottom of the page to show competencies that do not require action (competencies that are complete and not expired, competencies for past positions, etc.).

The **pale yellow backgrounds** indicate when the specified position is active.

The **green bars** indicate when the specified competency is up-to-date. Overlapping green bars (i.e. a white vertical line in the middle of the green bar) indicates that the competency was renewed while the previously completed training was still in effect. **Click on a green bar** to view the training details for the completed training.

The **orange lines** indicate periods when a competency is required for a position. Orange lines in the past indicate that a competency was required and incomplete or expired. Some competencies are required when a position starts (zero grace period), others have a grace period after the position starts, and some are require before a position starts (negative grace period). Optional competencies and exempted competencies will never have an orange line.

The **blue transparent bars** indicate that the worker has been enrolled in a training activity, classroom course, or online (SCORM) course. **Click on the blue bar** to view the details for the enrollment.

Grey text indicates that competency is an exempted competency for this worker.

Note: For classroom courses, is possible to enroll more workers than there are available spots. Enrolled, unconfirmed workers will be placed on a **waiting list** for the classroom course.

A warning icon (⚠) indicates that action is required (e.g. the competency is incomplete, the competency is expired, or changes must be reviewed).

View Worker Timeline

Click on the **"Workers"** tab. Search to find the worker, then click on the worker name to open the **"Details"** tab for the worker. Click on the **"Timeline"** tab to show the timeline for this worker.

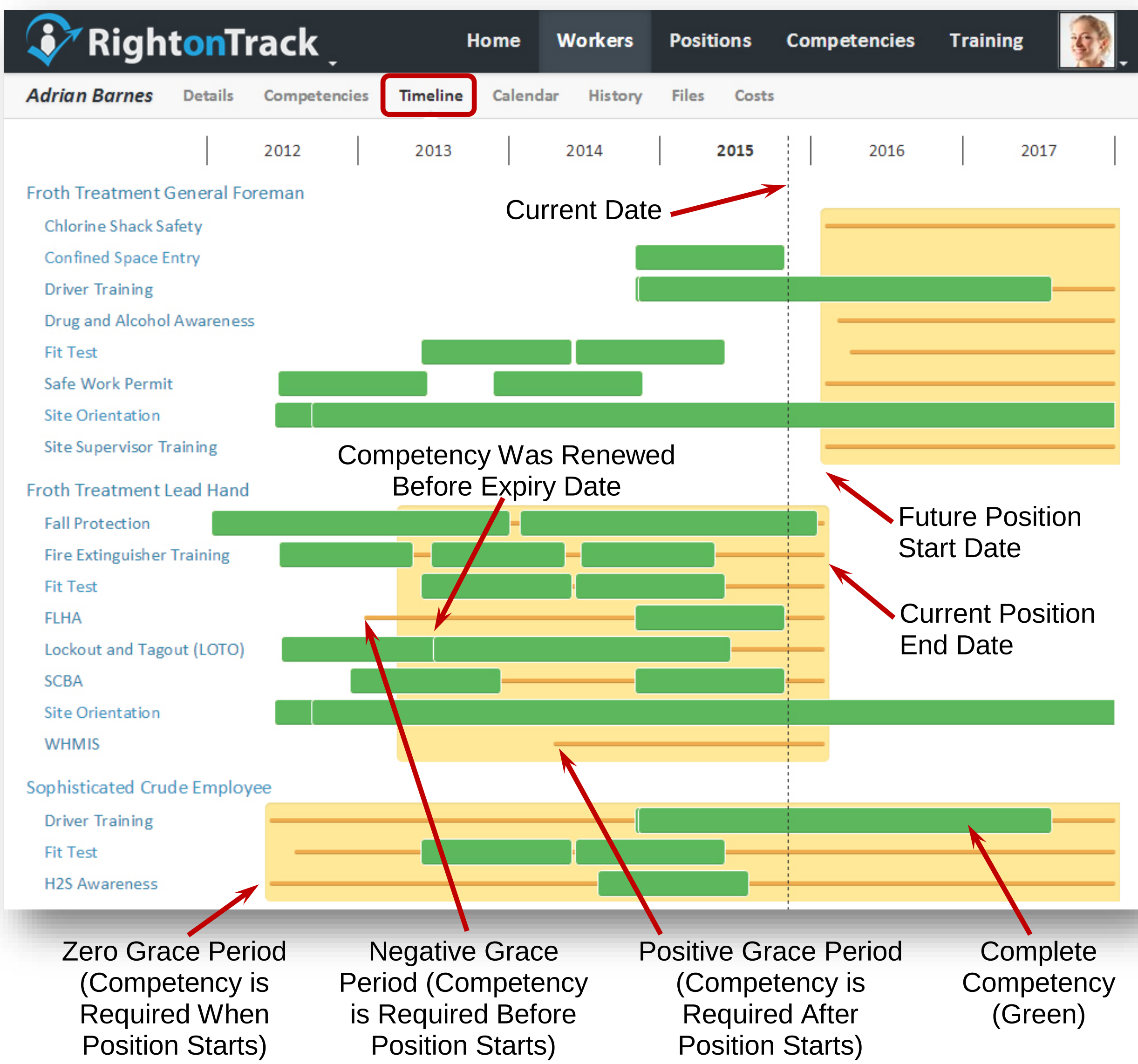
The timeline at the top of the screen shows the dates, with the current year in **bold** text. The vertical dashed line indicates today's date. The timeline shows the entire competency and position history for the selected worker.

The **pale yellow backgrounds** indicate when the specified position is active.

The **green bars** indicate when the specified competency is up-to-date. A white vertical line in the middle of the green bar indicates that the competency was renewed before the expiry date.

The **orange lines** indicate periods when a competency is required for a position. Orange lines in the past indicate that a competency was required and incomplete (or expired).

A competency may be required when a position starts (zero grace period), before a position starts (negative grace period), or after a position starts (positive grace period).



View Worker Calendar

Click on the **"Workers"** tab. Search to find the worker, then click on the worker name to open the **"Details"** tab for the worker. Click on the **"Calendar"** tab to show the training calendar for this worker.

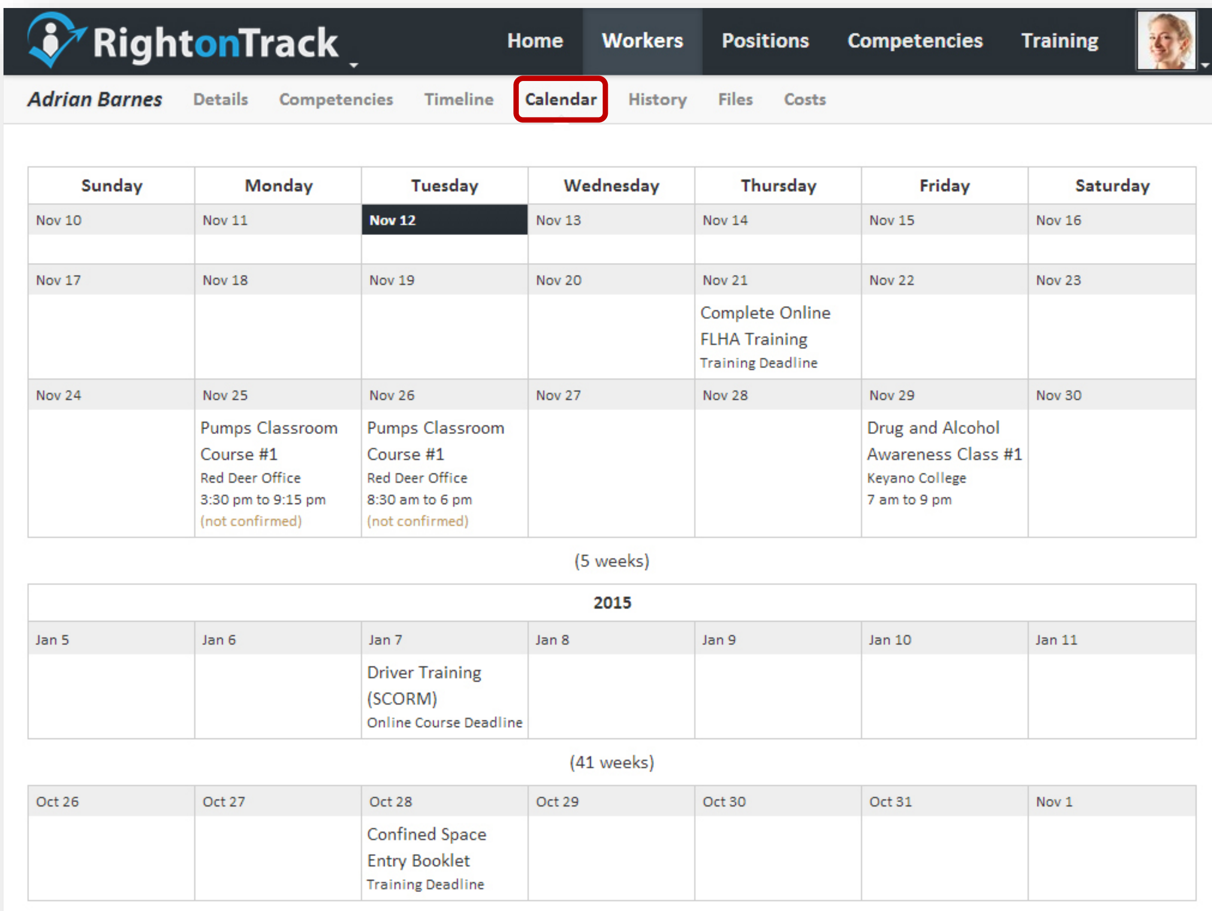
Note: The calendar only shows training events and deadlines scheduled in the future. See the worker **"History"** tab for information on past courses. Also, only weeks that contain training events or deadlines are shown. Gaps in the calendar are indicated using the number of weeks in between.

To get more information about a training event or deadline, click on the name of the item.

Clicking on a **scheduled classroom course** will bring up the course details, including date, time, location, and a map to the location (if available). Enrollments that are not yet confirmed will be labeled "not confirmed".

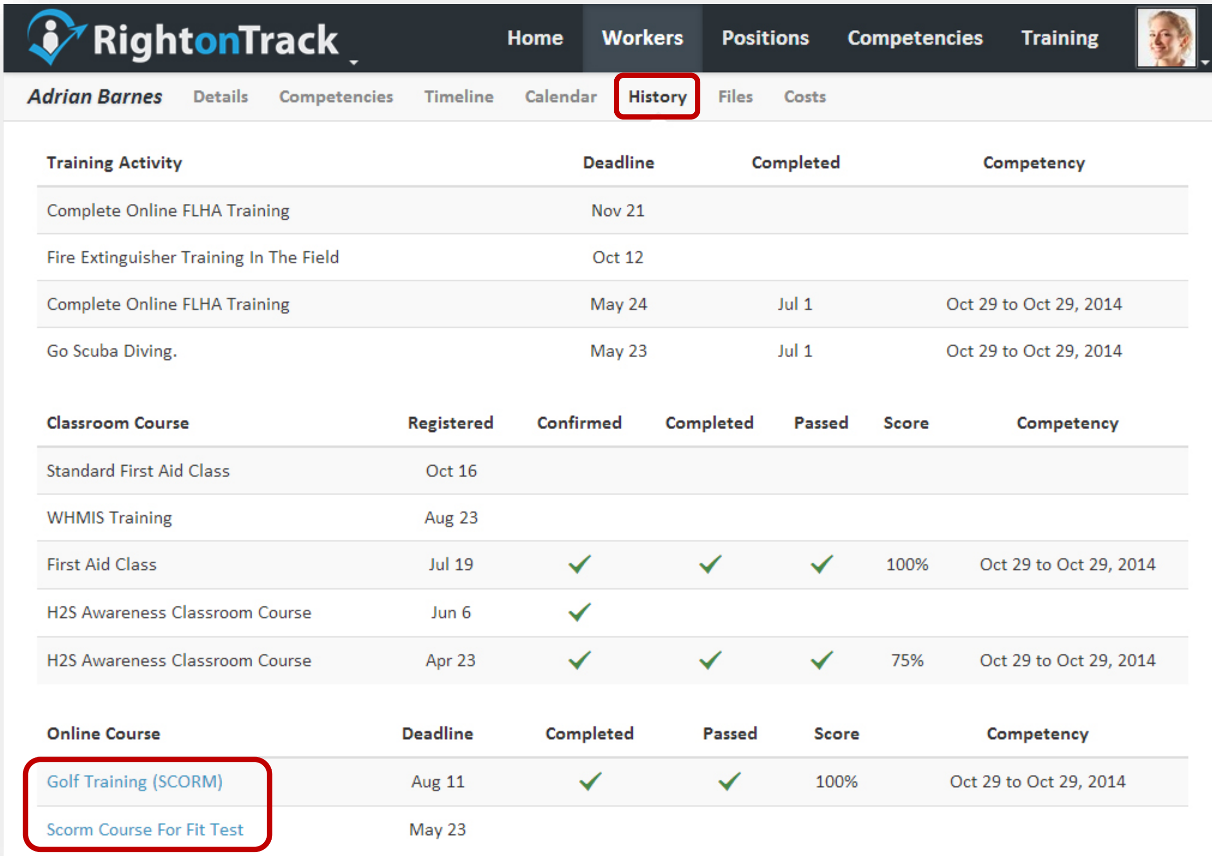
Clicking on a **training activity deadline** will bring up additional details, including any files related to this training activity (videos, SOPs, PowerPoint presentations, 3-rd party online training, etc.).

Clicking on an **online course deadline** will launch the SCORM course.



View Worker Training History

Click on the **"Workers"** tab. Search to find the worker, then click on the worker name to open the **"Details"** tab for the worker. Click on the **"History"** tab to show the training history for this worker.

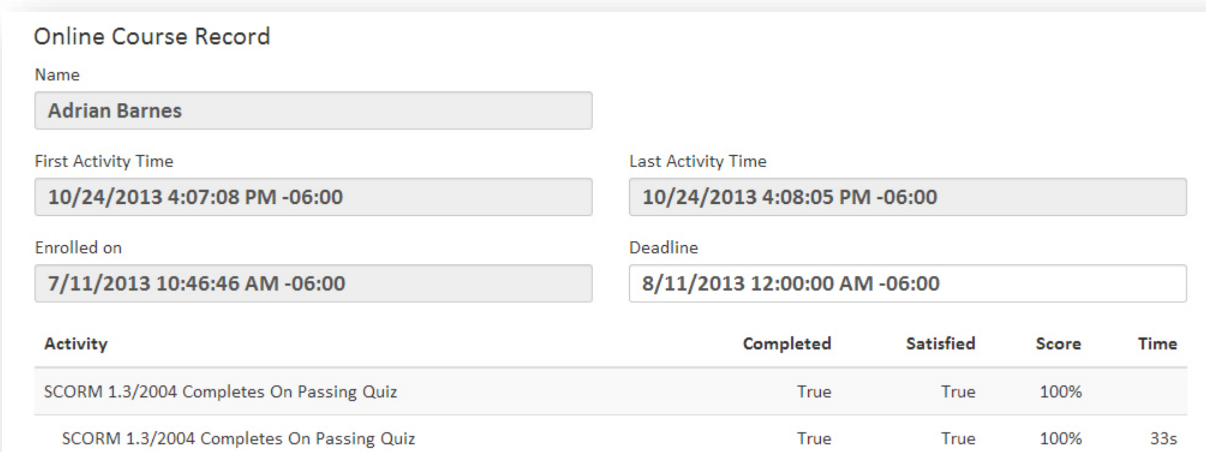


Training Activity	Deadline	Completed	Competency
Complete Online FLHA Training	Nov 21		
Fire Extinguisher Training In The Field	Oct 12		
Complete Online FLHA Training	May 24	Jul 1	Oct 29 to Oct 29, 2014
Go Scuba Diving.	May 23	Jul 1	Oct 29 to Oct 29, 2014

Classroom Course	Registered	Confirmed	Completed	Passed	Score	Competency
Standard First Aid Class	Oct 16					
WHMIS Training	Aug 23					
First Aid Class	Jul 19	✓	✓	✓	100%	Oct 29 to Oct 29, 2014
H2S Awareness Classroom Course	Jun 6	✓				
H2S Awareness Classroom Course	Apr 23	✓	✓	✓	75%	Oct 29 to Oct 29, 2014

Online Course	Deadline	Completed	Passed	Score	Competency
Golf Training (SCORM)	Aug 11	✓	✓	100%	Oct 29 to Oct 29, 2014
Scorm Course For Fit Test	May 23				

To get more details about online course progress for this worker, click on the title link under "Online Course". This will bring up the worker's online course information for the selected online course, as shown below:



Online Course Record

Name: Adrian Barnes

First Activity Time: 10/24/2013 4:07:08 PM -06:00

Last Activity Time: 10/24/2013 4:08:05 PM -06:00

Enrolled on: 7/11/2013 10:46:46 AM -06:00

Deadline: 8/11/2013 12:00:00 AM -06:00

Activity	Completed	Satisfied	Score	Time
SCORM 1.3/2004 Completes On Passing Quiz	True	True	100%	
SCORM 1.3/2004 Completes On Passing Quiz	True	True	100%	33s

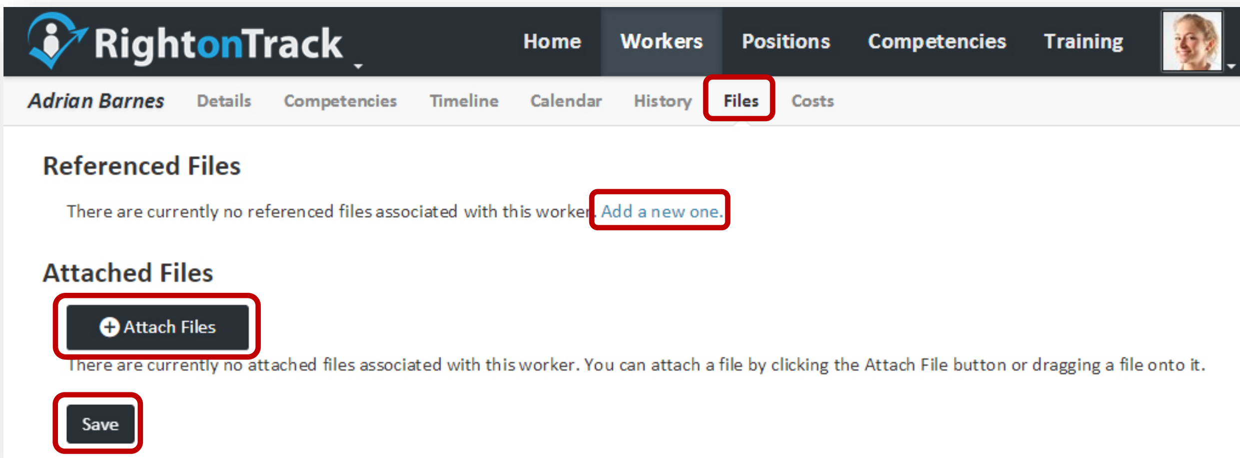
Reference or Attach a Worker File

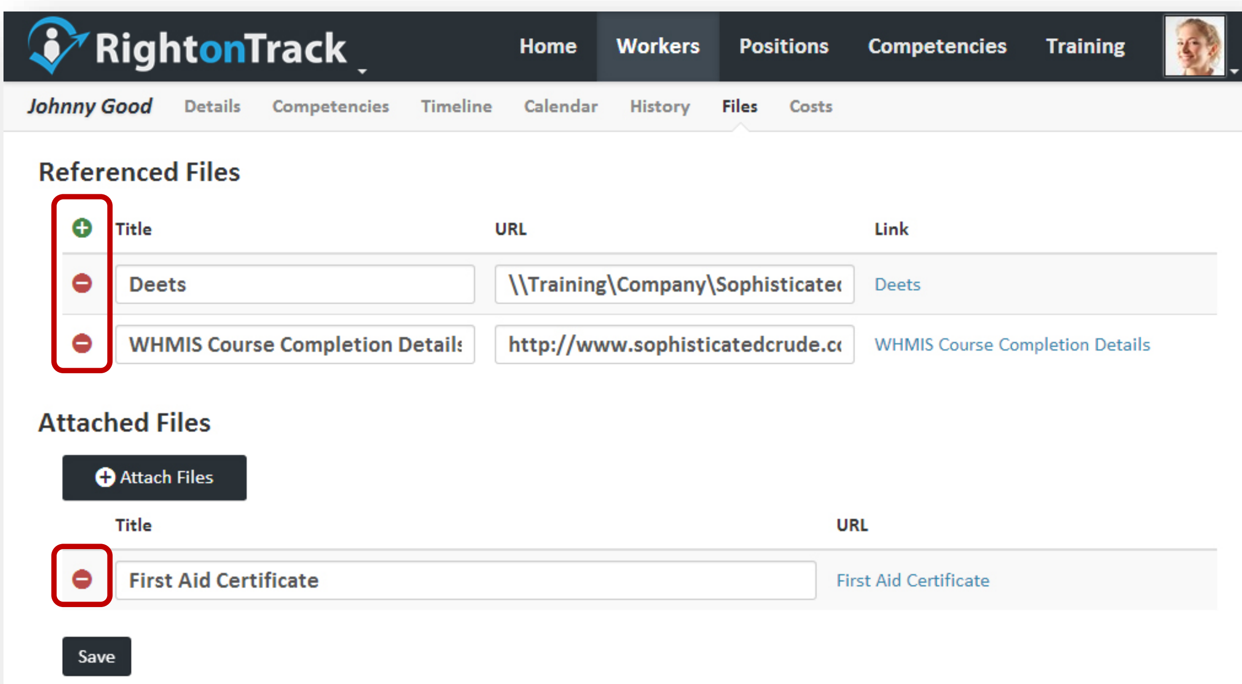
Note: Referencing (linking to) a file **does not** store a copy of the file in the database. If you reference a file on the internet or local intranet, only people with access to the location will be able to open the file. Attaching (uploading) a file **does** store a copy of the file in the database.

To reference or attach a worker file (such as a course completion certificate or scanned hardcopy exam), click on the **"Files"** tab for the worker. Click **"Add a new one."** to add the first referenced file, or press the button to add additional files.

Click the **"Attach Files"** button to attach one or more files.

Press the button to remove a referenced or attached file. When finished, press the **"Save"** button to save your changes.



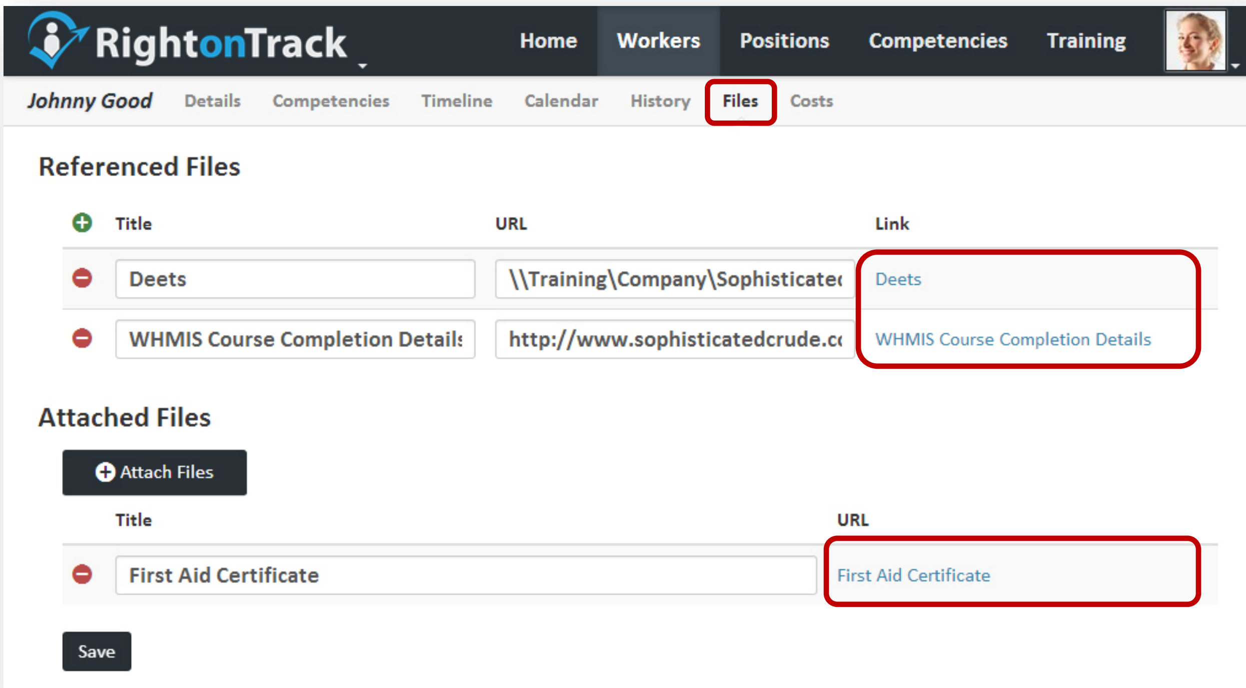


View a Worker File

Click on the **"Workers"** tab. Search to find the worker, then click on the worker name to open the **"Details"** tab for the worker. Click on the **"Files"** tab to show the files for this worker.

Click on the link after a file name to open the file.

Note: To open a referenced (a.k.a. linked or external) file, you must have access to the file location on the intranet or internet.



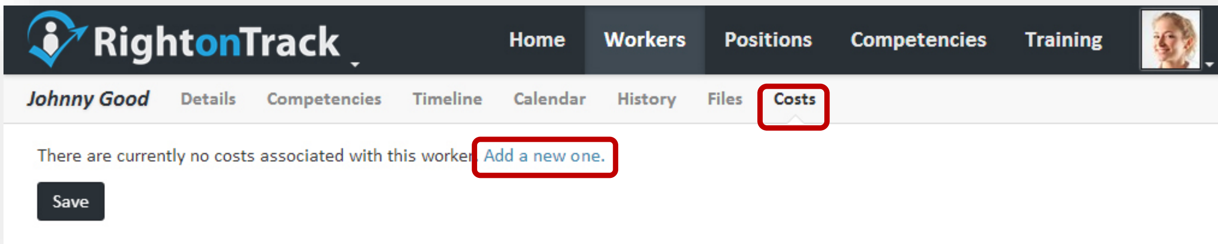
Add a Worker Cost

Note: A worker cost is a cost incurred in addition to online (SCORM) courses and classroom courses in the system, such as mileage, meals, accommodation, overtime, conference fees, etc.

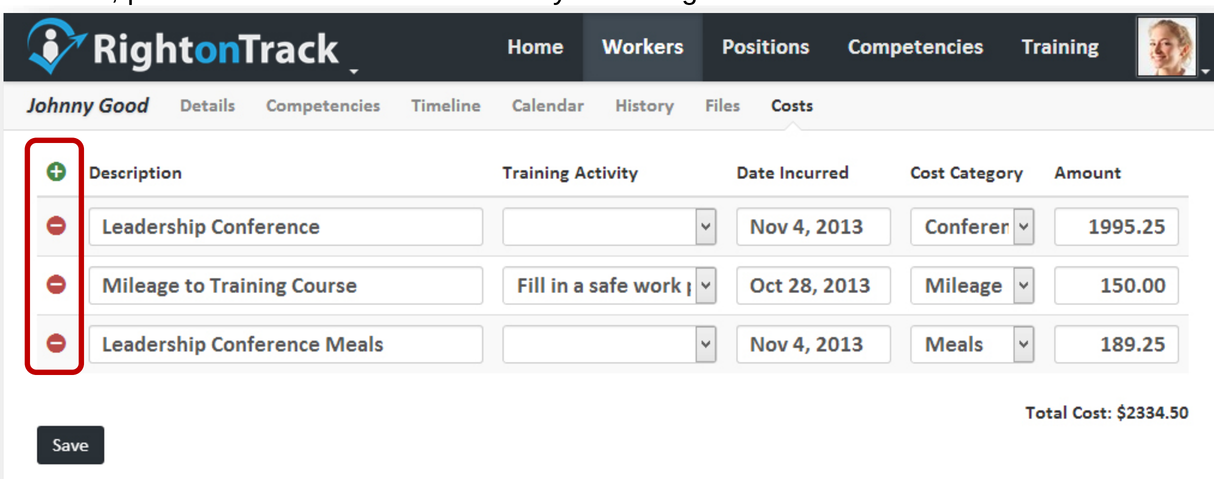
Optionally, a worker cost may be associated with a training activity. For instance, a training activity could require a third-party safety course to complete (First Aid, SCBA Training, H_2S Awareness, etc.).

Click on the **"Workers"** tab. Search to find the worker, then click on the worker name to open the **"Details"** tab for the worker. Click on the **"Costs"** tab to show the costs for this worker.

Click on the **"Add a new one."** link to add the first worker cost.



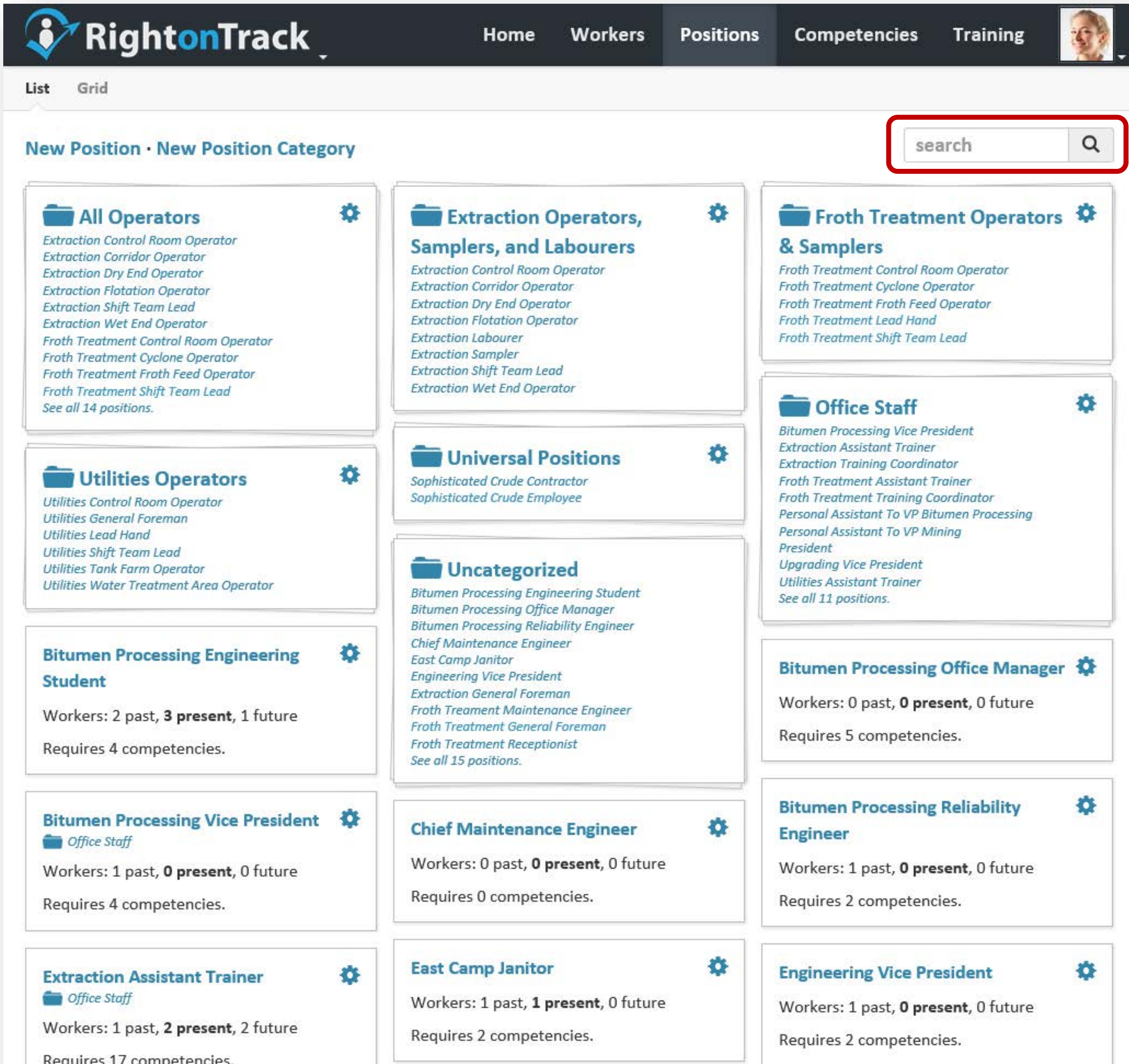
Press the button to add additional costs, or press a button to remove a worker cost. When finished, press the **"Save"** button to save your changes.



Find a Position or Position Category

Click on the **"Positions"** tab. Click the **search bar** and begin to type the name of the position or position category. The search bar will filter the information as you type.

Click on the title of a position or a position category for more information. Click on the gear beside the title to bring up the **"Details"** page for that item.



Note: Position categories are indicated by a folder icon. Positions that are not in a position category are listed under **"Uncategorized."**

Note: To search only the positions within a specific category, click on the category name. This will display only the positions in the selected category. Once a category is selected, the search bar will search within the selected category only.

Create a New Position

Click on the **"Positions"** tab. Click on the **"New Position"** link.

Enter the position name. Press the **"Create"** button and the **"Details"** page for the newly created position will open.

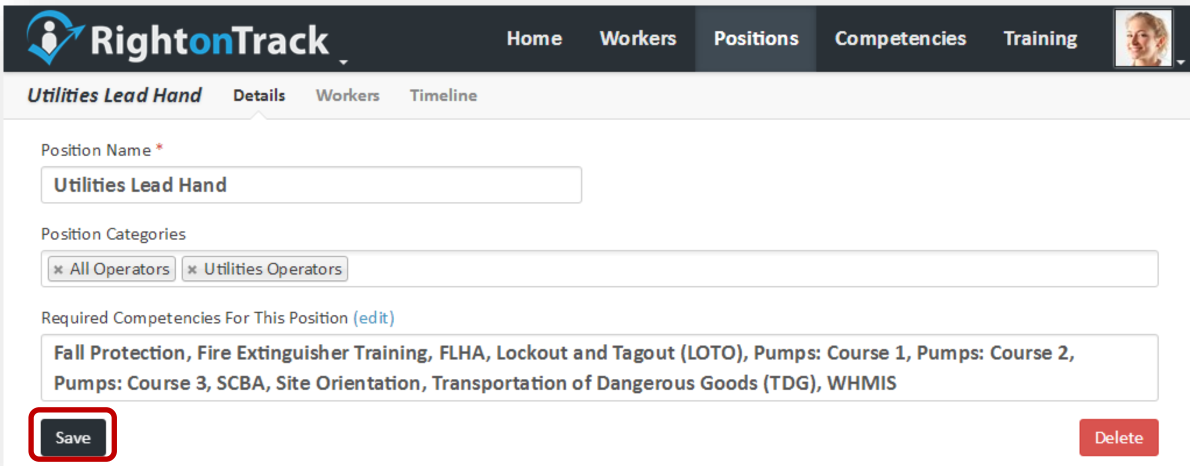
Edit Position Details

Click on the **"Positions"** tab. Search to find the position you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the position.

From this page, you can view the required competencies for this position and the position categories to which this position belongs. To search available options, click inside the box and begin typing. Use the × to remove competencies or position categories that do not apply to this position.

When finished, click the **"Save"** button to save your changes.

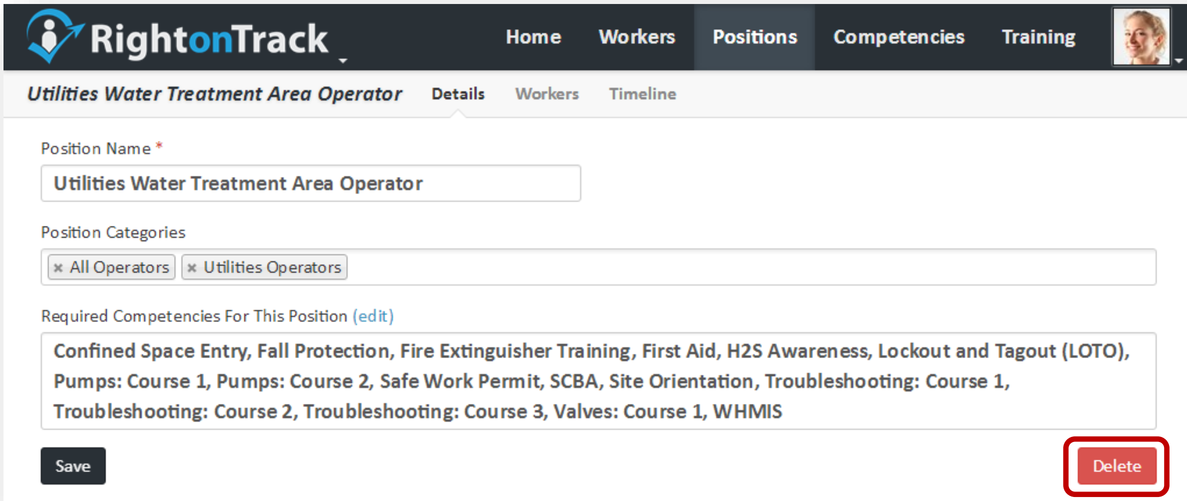
To edit the required competencies for this position, click on **"(edit)"** to open the grid.



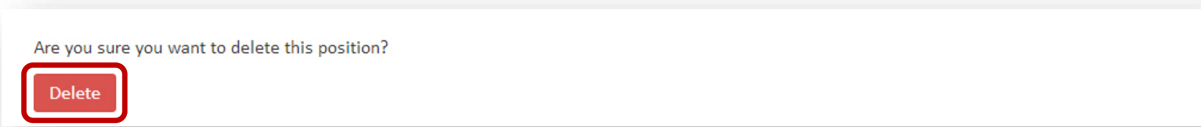
Delete a Position

Click on the **"Positions"** tab. Search to find the position you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the position.

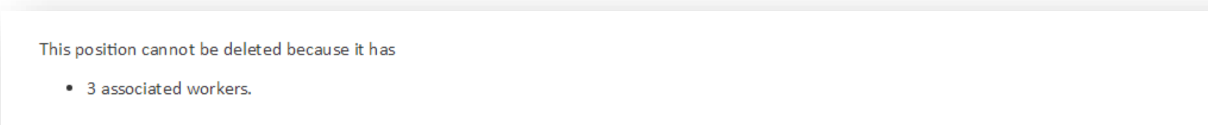
Press the **"Delete"** button at the bottom right side of the page to delete the position.



When prompted, press the **"Delete"** button to confirm.



Note: You cannot delete a position while it is assigned to one or more workers. Remove the associated workers before deleting the position.

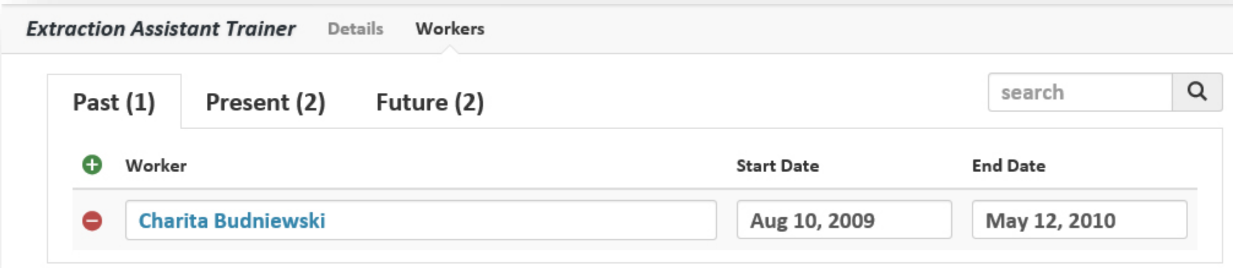


Assign Workers to a Past, Present, or Future Position

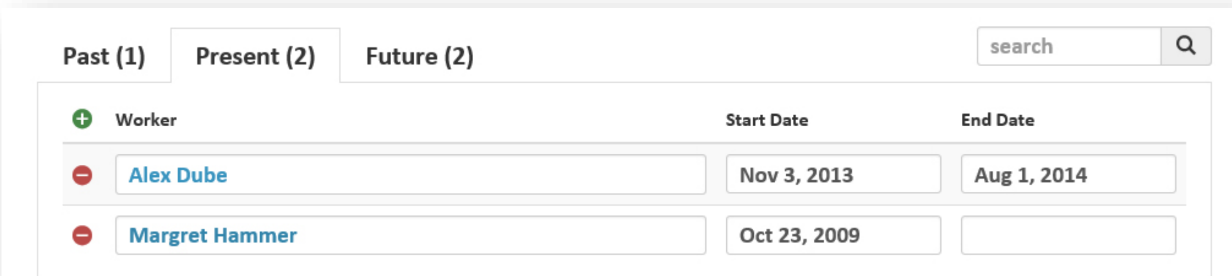
Click on the **"Positions"** tab. Search to find the position, then click on the position title. Go to the **"Workers"** tab for the position. Press the button to add a worker to this position, or the button to remove a worker from this position.

Note: Do not delete past positions; give them an end date instead. When you change the start and end dates of a position, it will automatically move to the past, present, or future tab based on the new dates.

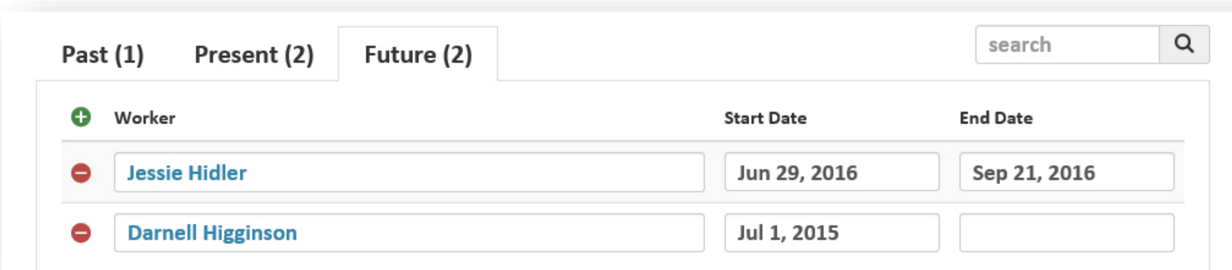
A **past** position will always have a fixed start date in the past. It will always have an end date in the past. Workers with **only** past positions are **not counted** as "active" for billing purposes.



A **present** position will always have a start date in the past. It can have a fixed end date in the future or no end date. Workers with present positions are counted as "active" for billing purposes.



A **future** position will always have a start date in the future. It can have an end date in the future or no end date. Future positions can be used for succession planning. Workers with future positions are counted as "active" for billing purposes.



Create a New Position Category

Click on the **"Positions"** tab. Click on the **"New Position Category"** link.

Enter the position category name. Press the **"Create"** button and the **"Details"** page for the newly created position category will open.

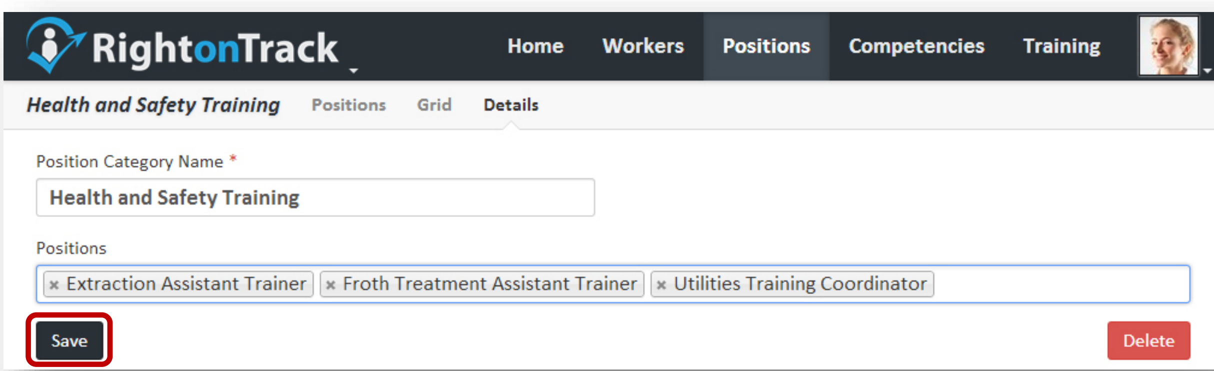
Edit Position Category Details

Click on the **"Positions"** tab. [Search](#) to find the position category you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the position category.

Add positions to this position category by typing in the box. Use the × to remove positions that do not apply to this position category.

When finished, click the **"Save"** button to save your changes.

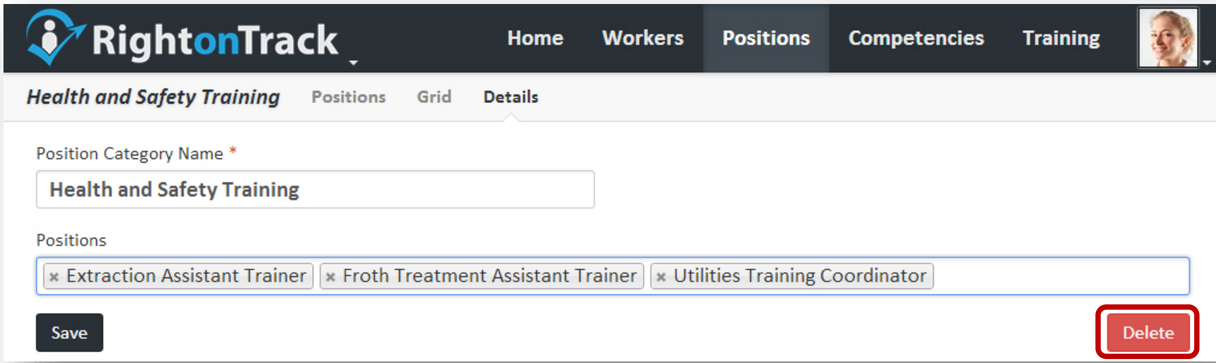
Note: To search available options, click inside the box and begin typing.



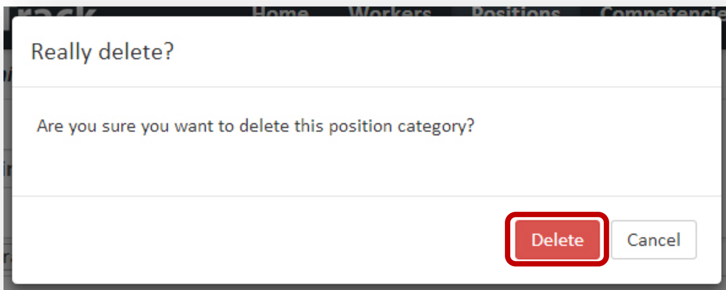
Delete a Position Category

Click on the **"Positions"** tab. Search to find the position category you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the position category.

Press the **"Delete"** button at the bottom right side of the page to delete the position category.



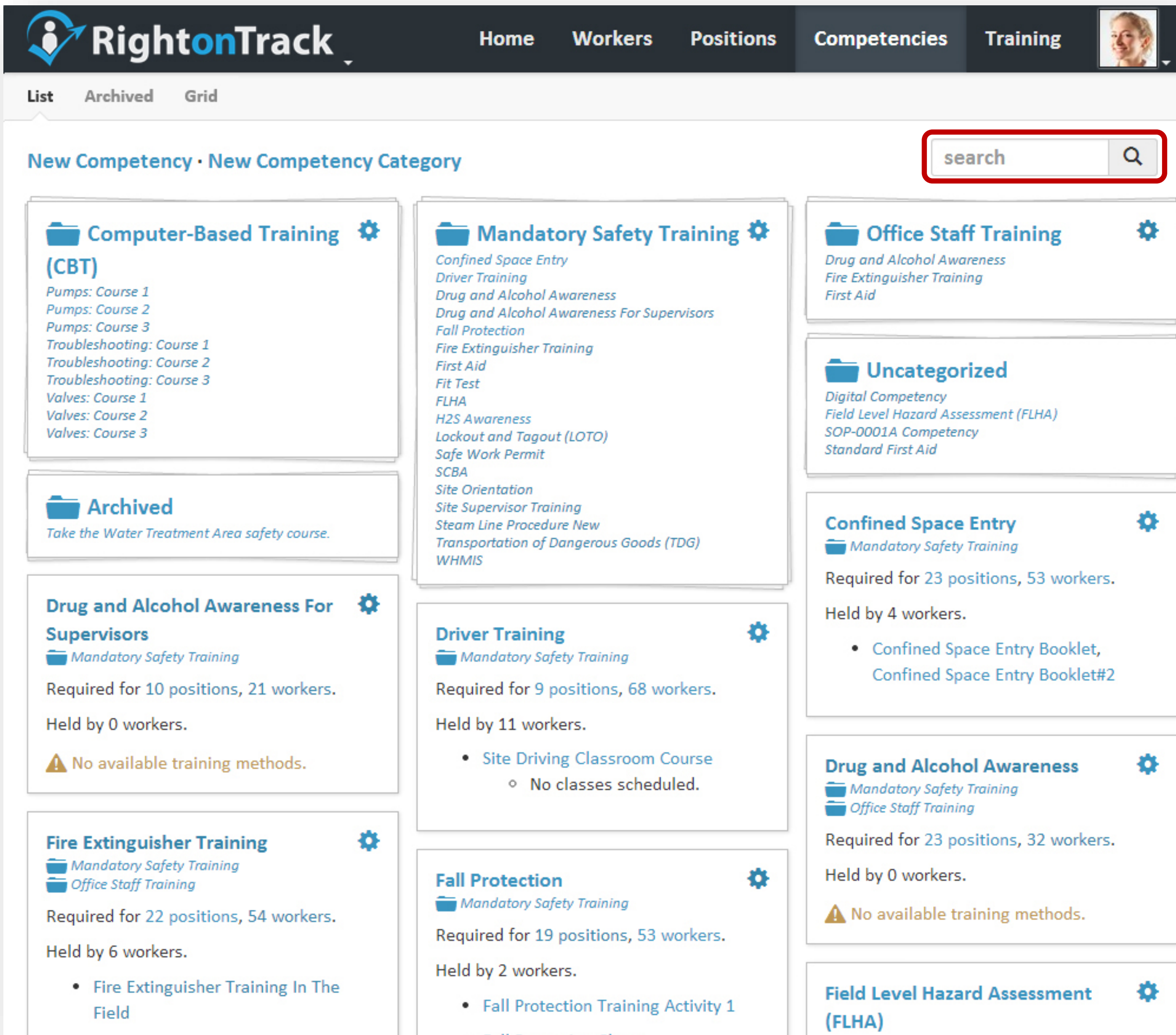
When prompted, press the **"Delete"** button to confirm.



Find a Competency or Competency Category

Click on the **"Competencies"** tab. Click the **search bar** and begin to type the name of the competency or competency category. The search bar will filter the information as you type.

Click on the title of a competency or competency category for more information. Click on the gear beside the title to bring up the **"Details"** page for that item.



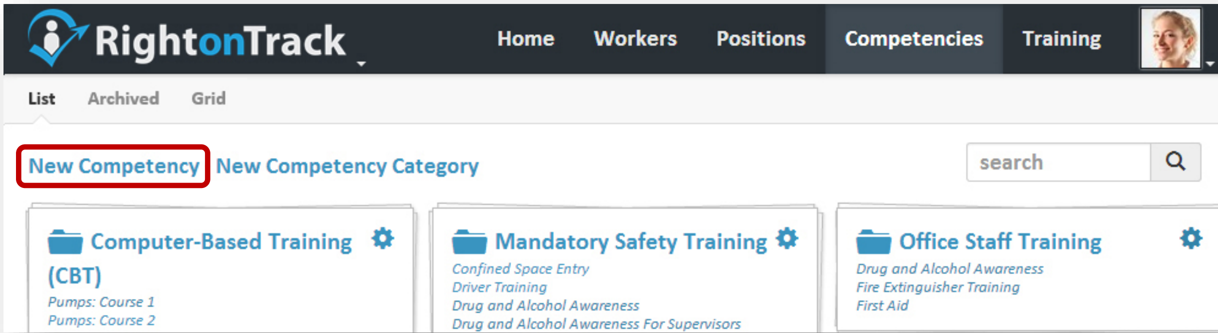
Note: Competency categories are indicated by a folder icon ( ). Competencies that are not in a competency category are listed under **"Uncategorized."**

Archived competencies are listed under the **"Archived"** submenu tab.

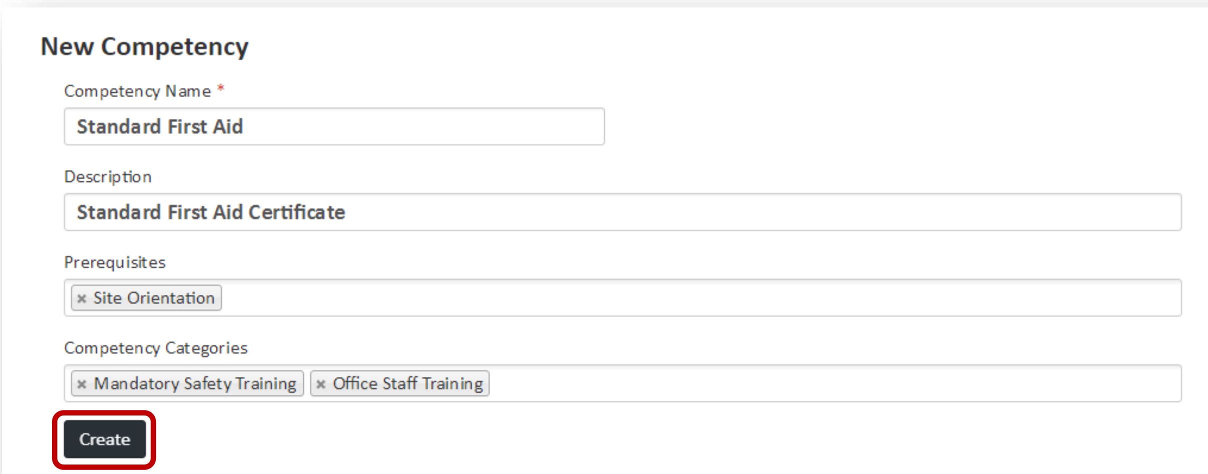
Note: To search only the competencies within a specific category, click on the category name. This will display only the competencies in the selected category. Once a category is selected, the search bar will search within the selected category only.

Create a New Competency

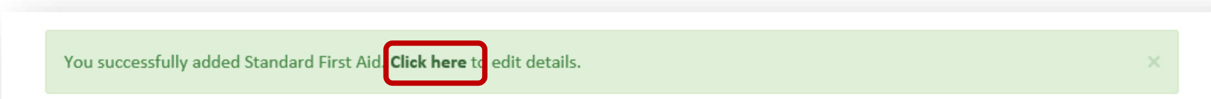
Click on the **"Competencies"** tab. Click on the **"New Competency"** link.



Enter the competency name and other applicable information. Press the **"Create"** button to create the competency.



At this point, you can create another competency or choose "Click Here" to open the **"Details"** page for the newly created competency.



Edit Competency Details

Click on the **"Competencies"** tab. Search to find the competency you wish to edit, then click on the gear icon () beside the title to bring up the **"Details"** tab for the competency.

From this page, you can edit the prerequisite competencies, the positions that require this competency, and the competency categories to which this competency belongs. To search available options, click inside the box and begin typing. Use the × to remove competencies or position categories that do not apply to this position.

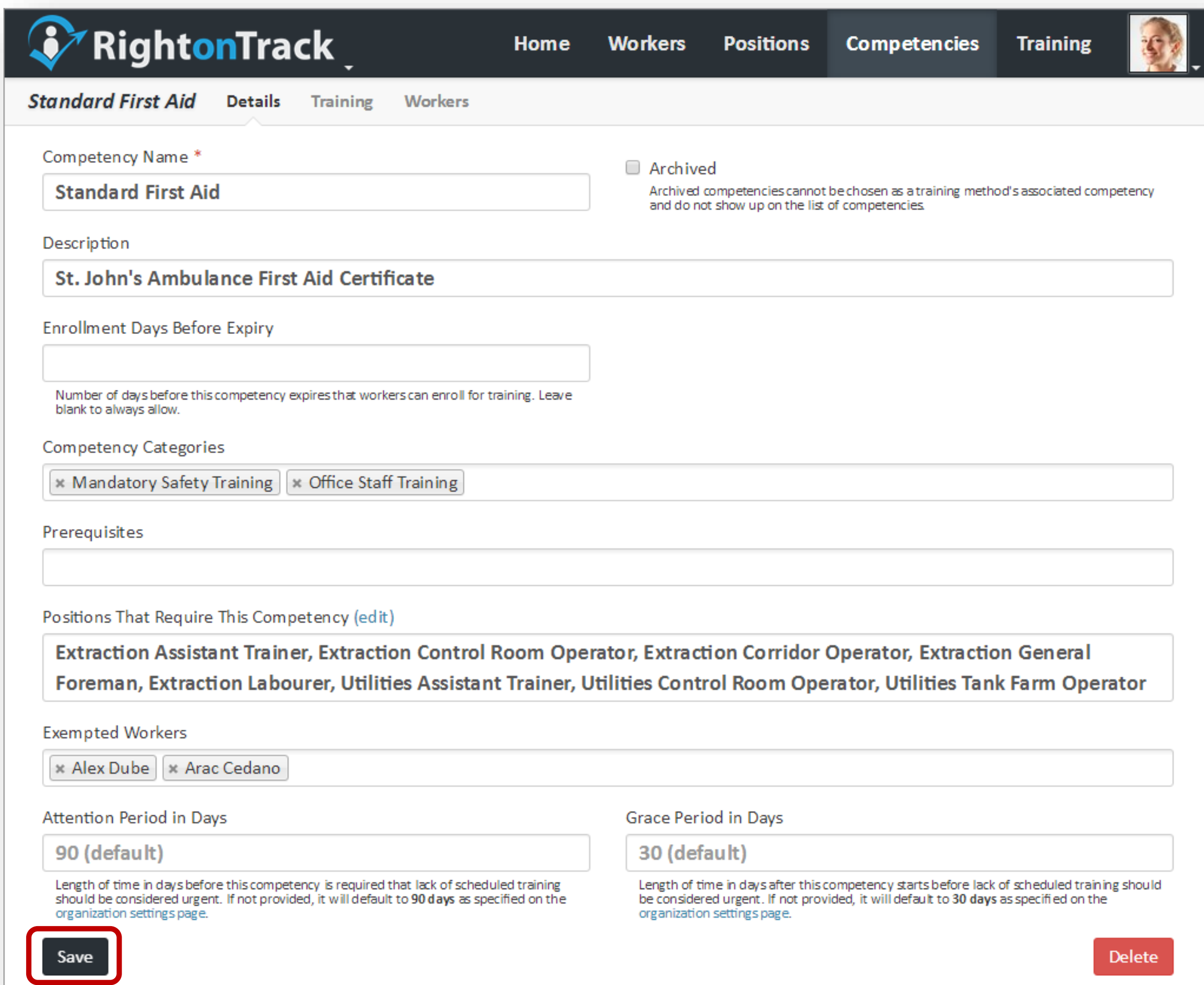
"Enrollment Days Before Expiry" determines the number of days before the competency expires that the worker can enroll for training. Leave this field blank to always allow enrollment.

The **"Attention Period"** and **"Grace Period"** can be set for the entire competency. These values will override the organization defaults, which are displayed in **grey** text when no value is set.

Workers may be exempted from a competency; this means the exempted worker may register for associated training, but the competency will not appear as a required competency for this worker.

When finished, click the **"Save"** button to save your changes.

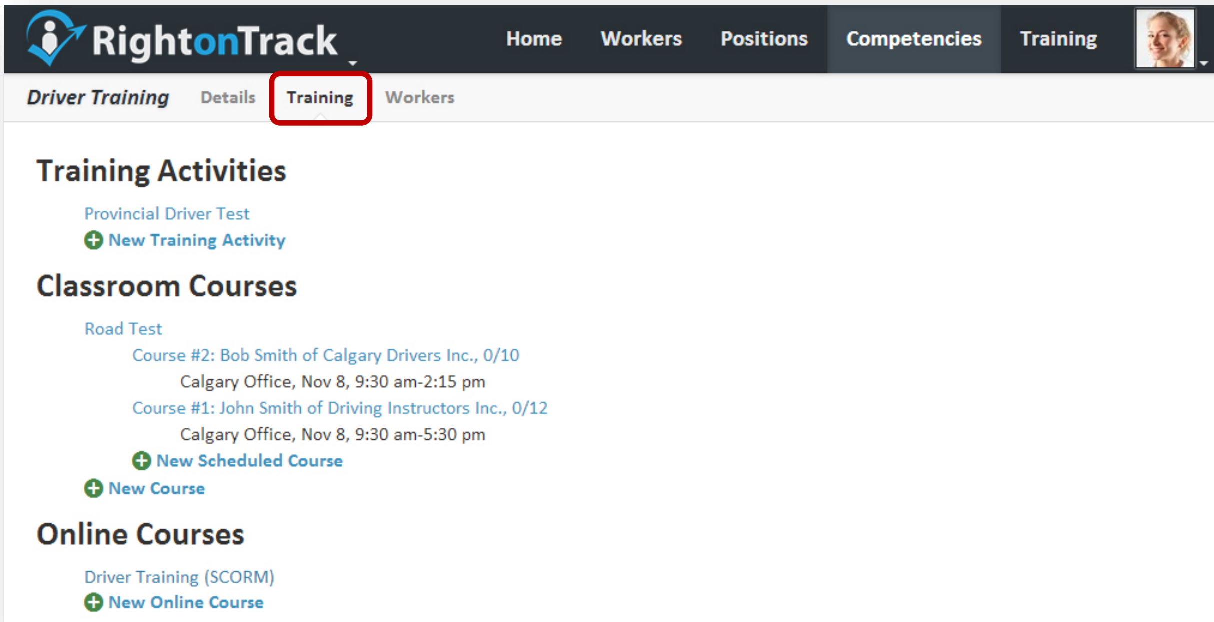
To edit the required positions for this competency, click on **"(edit)"** to open the grid.



Add or View Training for a Specific Competency

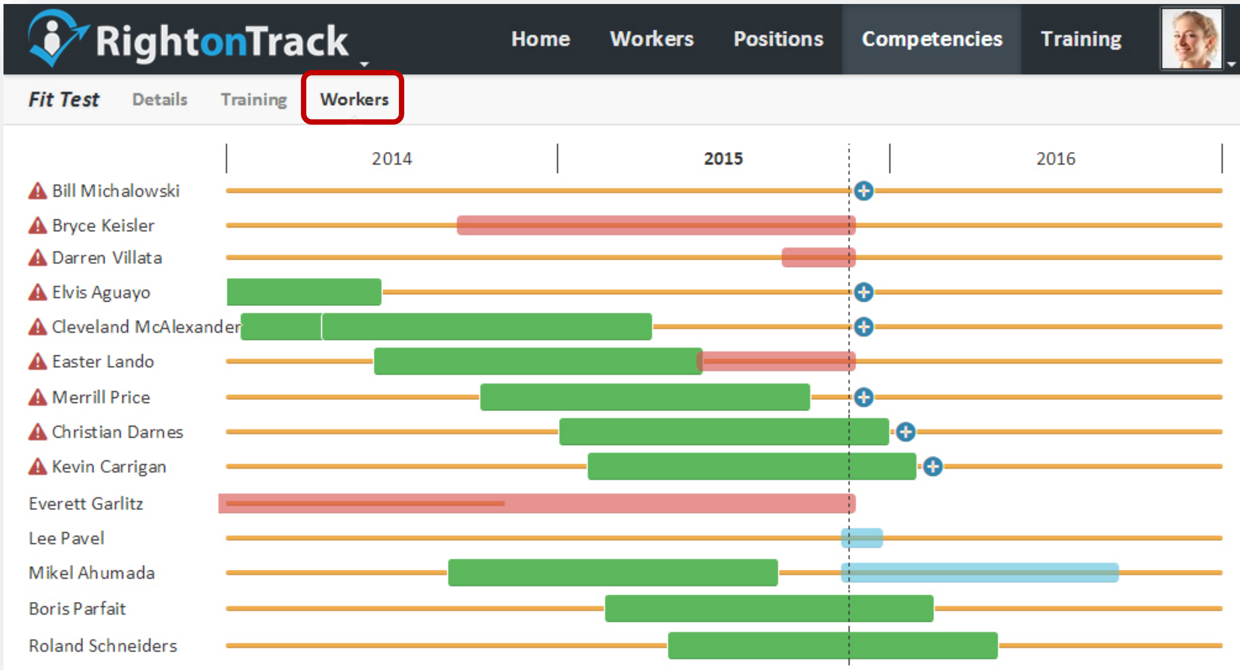
Click on the **"Competencies"** tab. Search to find the competency, then click on the competency title. Click on the **"Training"** submenu tab for the selected competency.

Click on a **"New"** link to create a new training activity, classroom course, scheduled course, or online course for this competency.

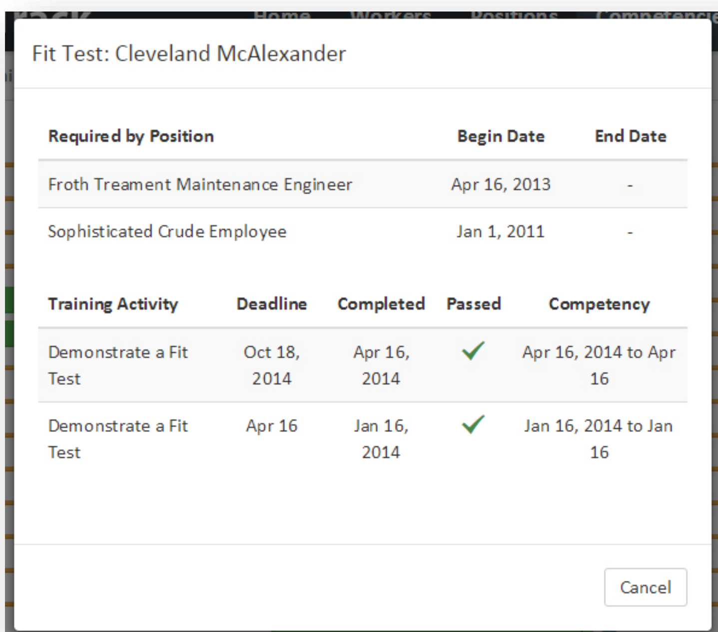


View Worker Status for a Specific Competency

Click on the **"Competencies"** tab. Search to find the competency, then click on the competency title to bring up the **"Workers"** submenu for the competency. The legend at the bottom of the page explains the color coding.



Worker: Click on a worker's name to view more details about their competency history and requirements.



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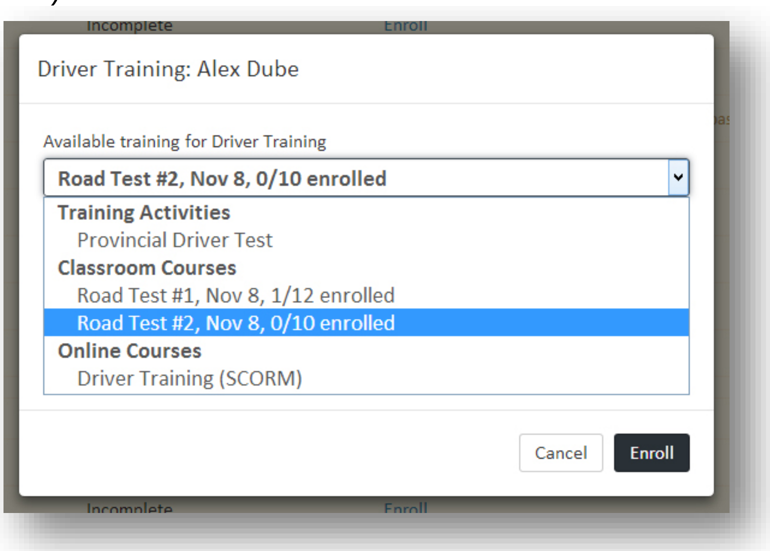
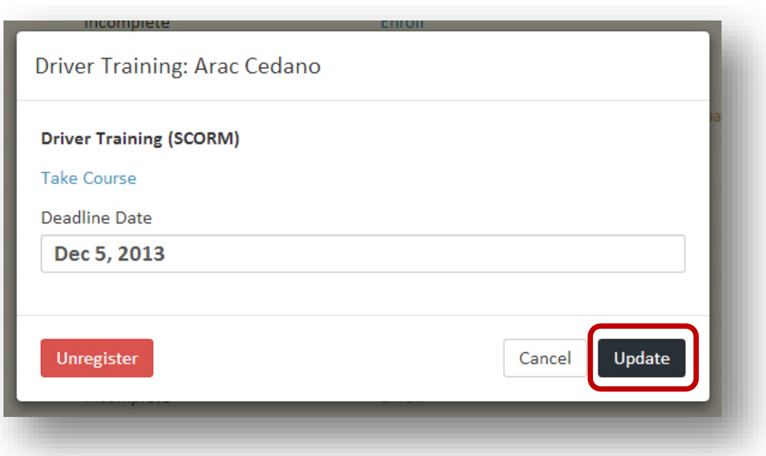
To enroll a worker in training, click the **"Enroll"** (**+**) button for the competency, and the available training options will be displayed. Select a training option, then select **"Enroll"** to enroll the worker in the training. If there is no **"Enroll"** button on a needed competency, it means that there are no available training methods (e.g., no upcoming scheduled classroom courses, no training activities, and no online courses).



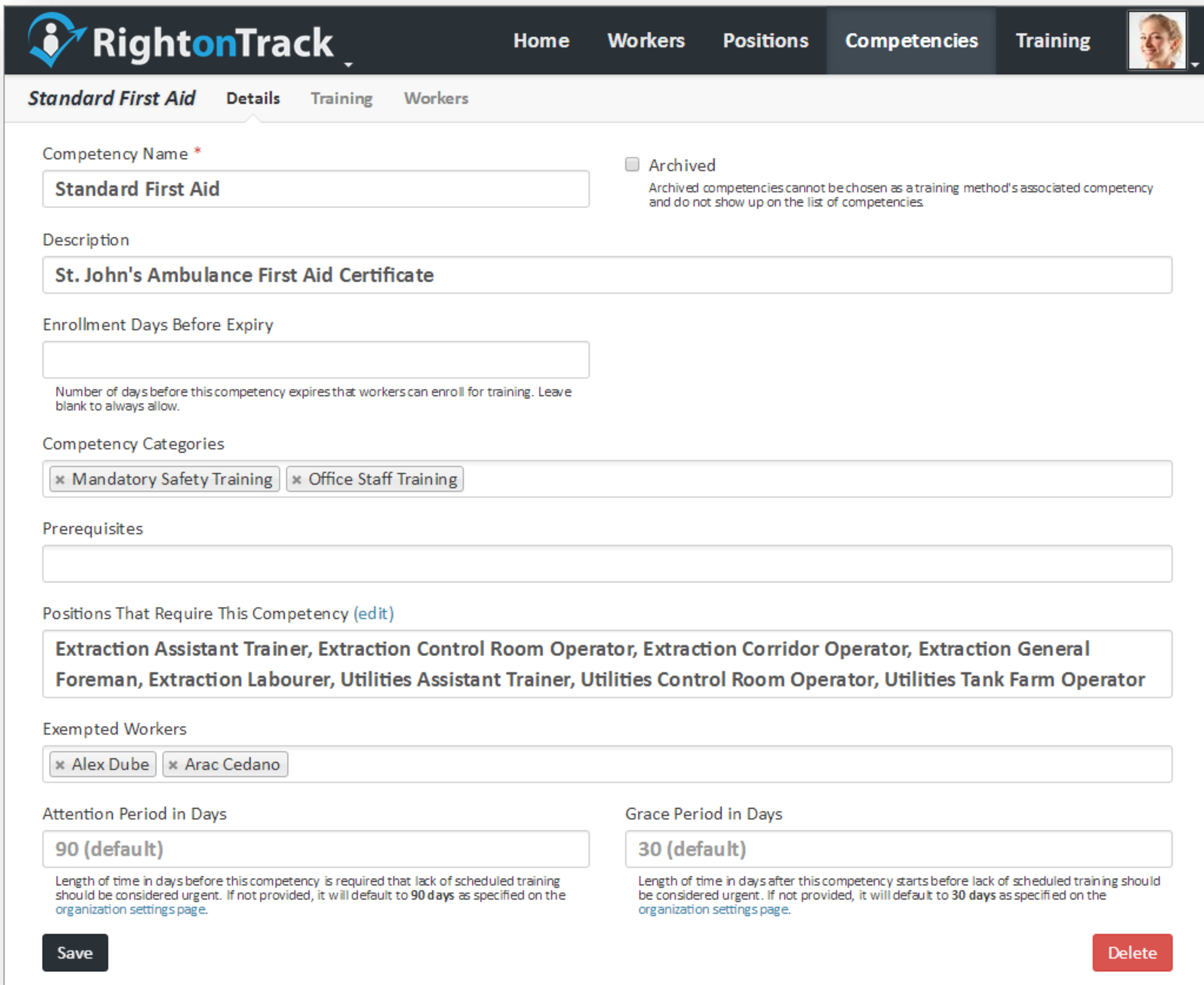
Click on a **green bar** to view the details for a completed competency. Click on a **blue bar** or **red bar** to view the details for an enrollment.



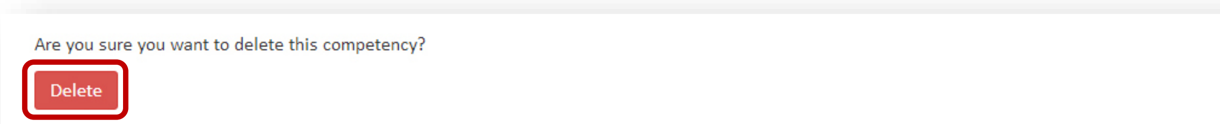
Delete or Archive a Competency

Click on the **"Competencies"** tab. Search to find the competency you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the competency.

Press the **"Delete"** button at the bottom right side of the page to delete the competency.



When prompted, press the **"Delete"** button to confirm.



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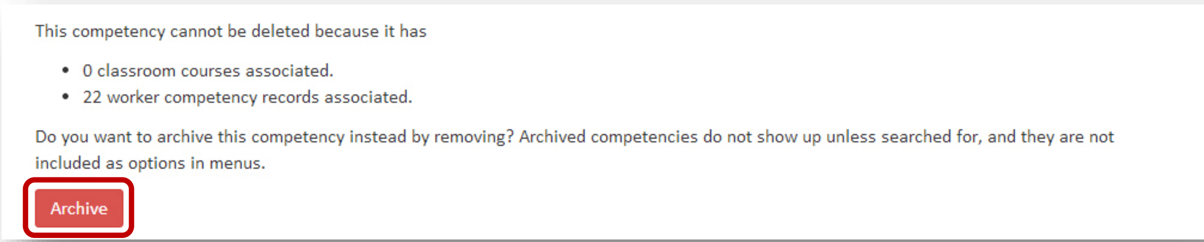
Note: You cannot delete a competency with associated training or worker competencies. Instead, pressing the delete button in this case will prompt you to "archive" the competency. See Archiving for more information.

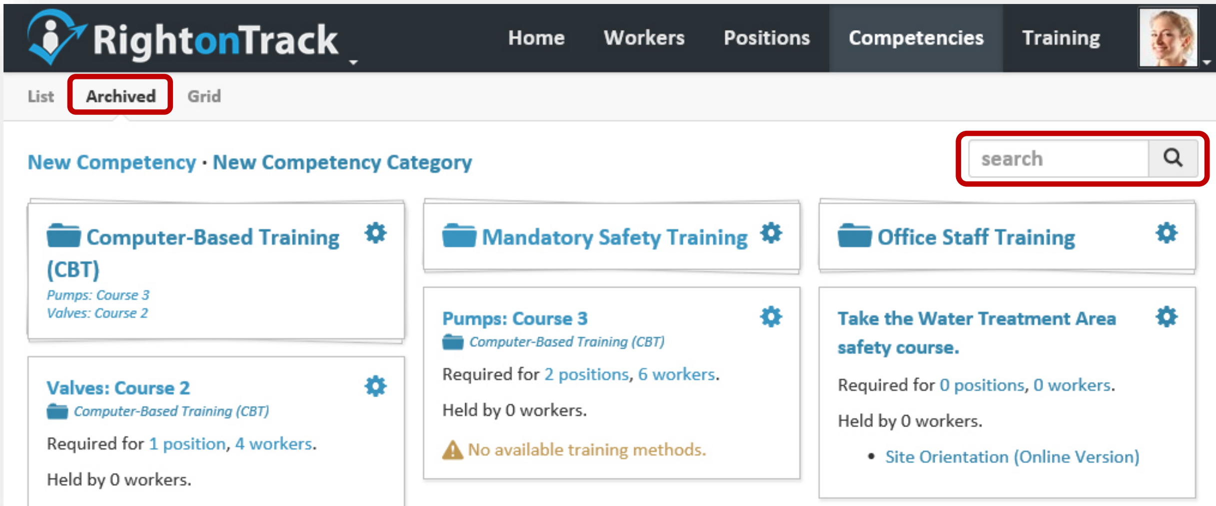
When prompted, press the **"Archive"** button to archive the competency. Alternatively, you can archive a competency by checking the **"Archived"** checkbox on the competency details page.



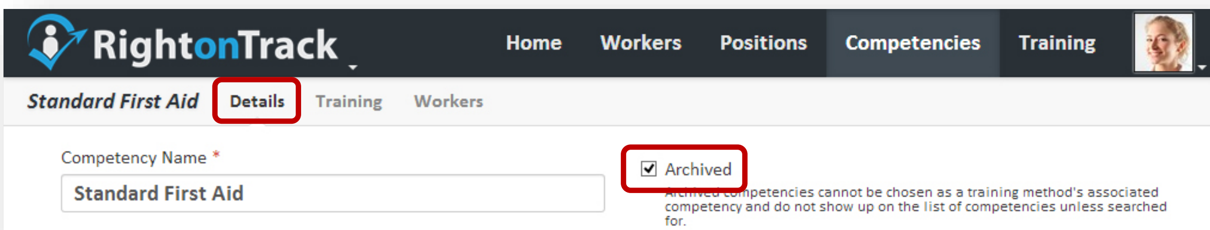
Reinstate an Archived Competency

Click on the **"Competencies"** tab. Click on the **"Archived"** submenu tab to display the archived positions Search to find the archived competency, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the archived competency.

Note: Click on the **"Archived"** category to display a list of all archived competencies.

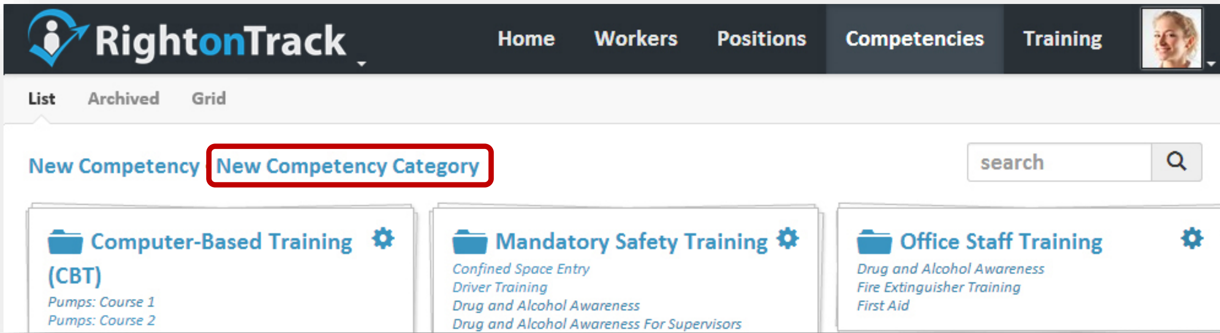


Uncheck the **"Archived"** checkbox to reinstate the archived competency. When finished, click the **"Save"** button to save your changes.

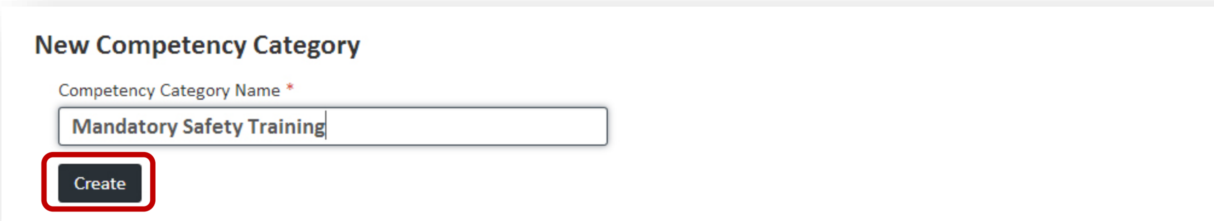


Create a New Competency Category

Click on the **"Competencies"** tab. Click on the **"New Competency Category"** link.



Enter the competency category name. Press the **"Create"** button and the **"Details"** page for the newly created competency category will open.



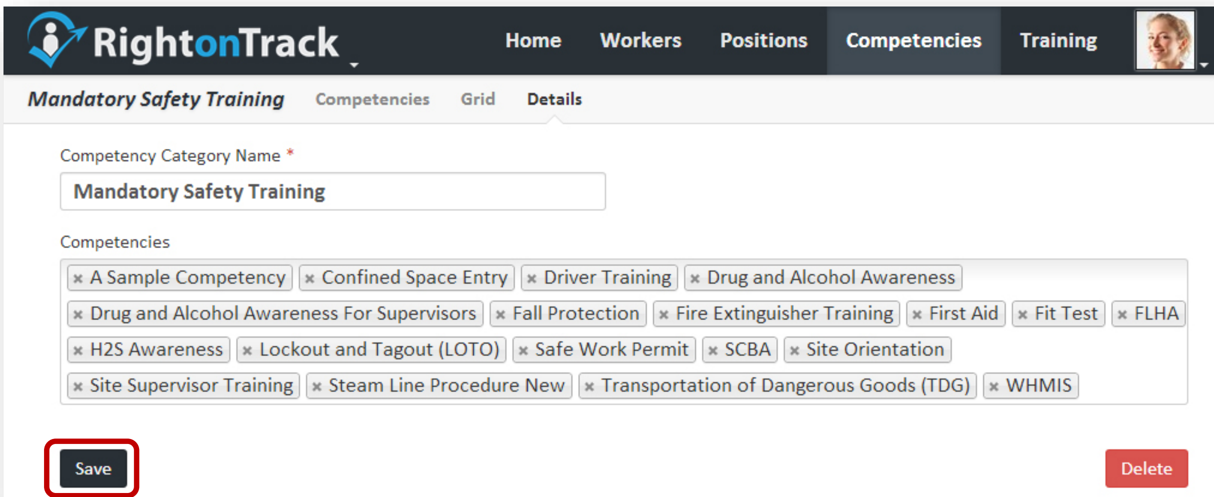
Edit Competency Category Details

Click on the **"Competencies"** tab. Search to find the competency category you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the competency category.

Add competencies to this competency category by typing in the box. Use the to remove competencies that do not apply to this competency category.

When finished, click the **"Save"** button to save your changes.

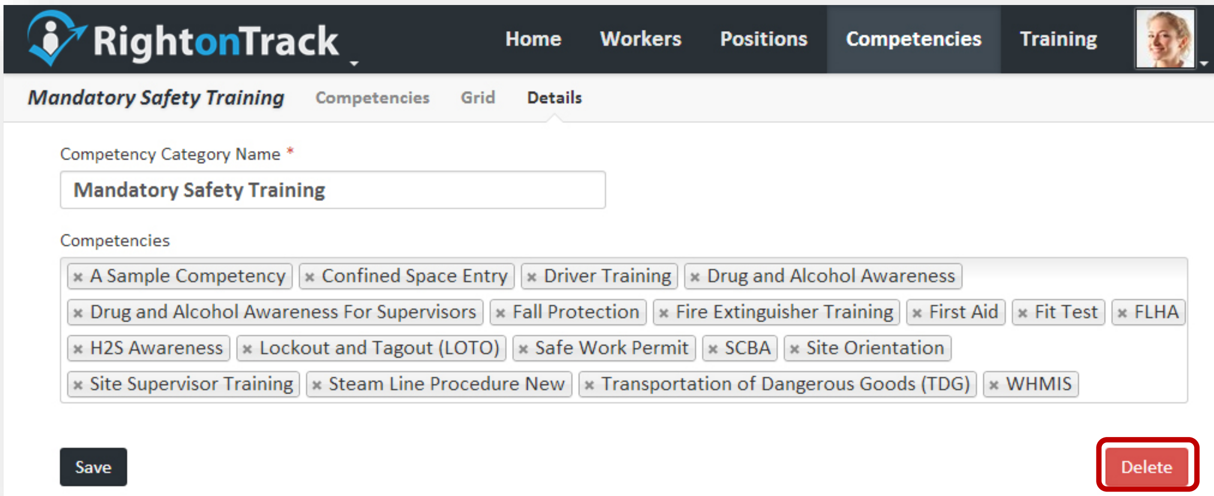
Note: To search available options, click inside the box and begin typing.



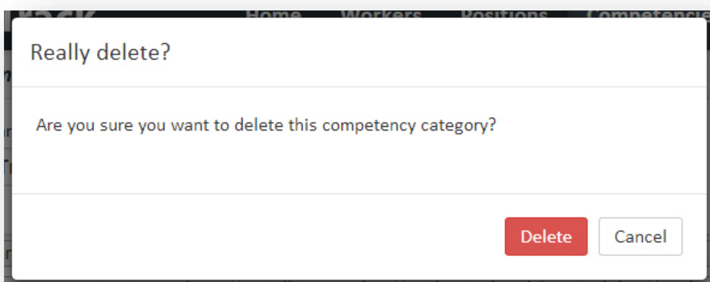
Delete a Competency Category

Click on the **"Competencies"** tab. Search to find the competency category you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Details"** tab for the competency category.

Press the **"Delete"** button at the bottom right side of the page to delete the competency category.



When prompted, press the **"Delete"** button to confirm.



Use the Grid to Edit the Position Competency Requirements

Click on the **"Positions"** tab or the **"Competencies"** tab then select the **"Grid"** submenu tab.

Use the dropdown lists to select a position category and a competency category; these will appear on the grid below.

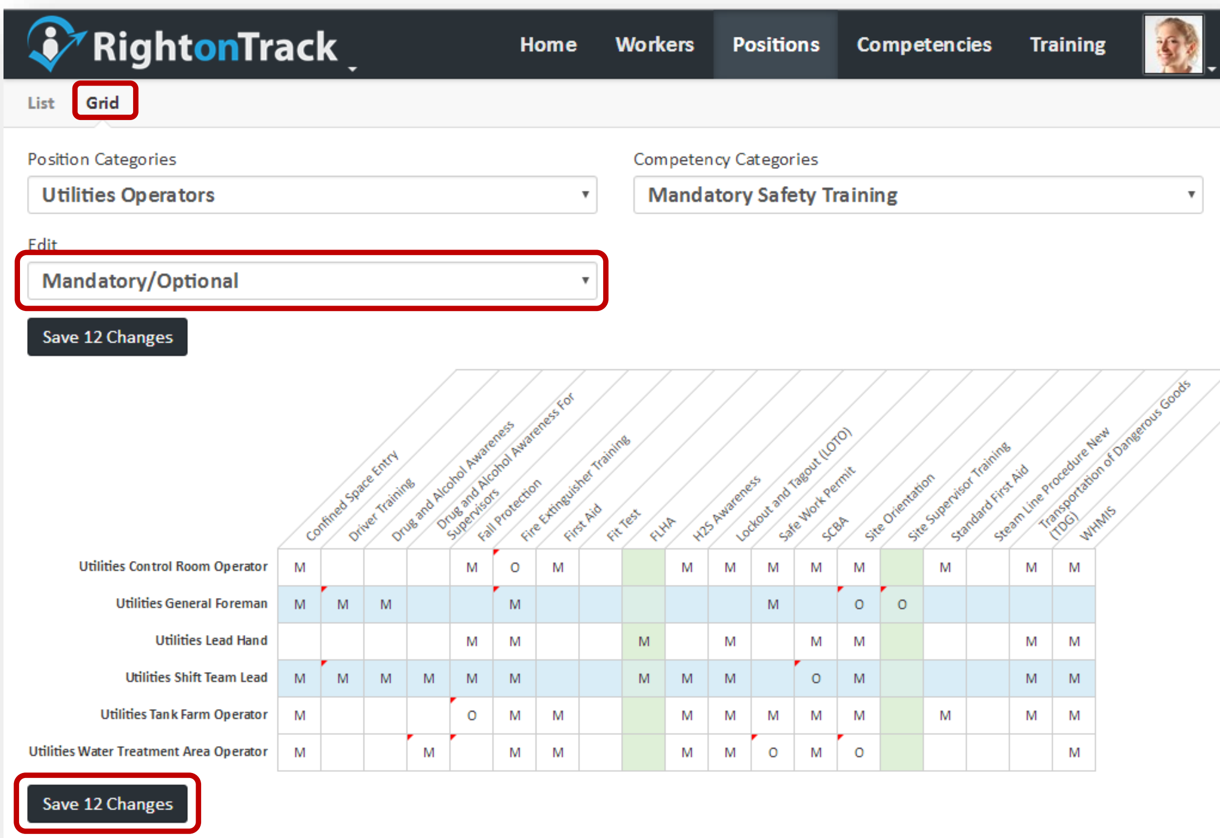
By default, the edit mode is set to **"Mandatory/Optional."** This edit mode shows the competency requirements (Mandatory/Optional/Not Required) for each position / competency combination in the selected categories. Click on the grid to change the settings as desired.

You can also change the edit mode to **"Attention Period in Days"** or **"Grace Period in Days"** (shown on the following page). In these modes, you can view and edit the position/competency settings for a specific position/competency pair. Grey text indicates defaults (organization or competency) and black text indicates a position/competency setting. Click on a number to edit it. Blank cells indicate that the competency is not required for the position.

Note: You can click on row and column titles to highlight the rows and columns; this makes editing easier. The red flags in the upper left corner of the cells indicate which cells have been changed.

Click the "Save Changes" button when you are finished to save your changes.

Note: During editing, you may use the dropdown lists to switch between categories and edit modes without losing your changes. All changes made will be saved if you click save.



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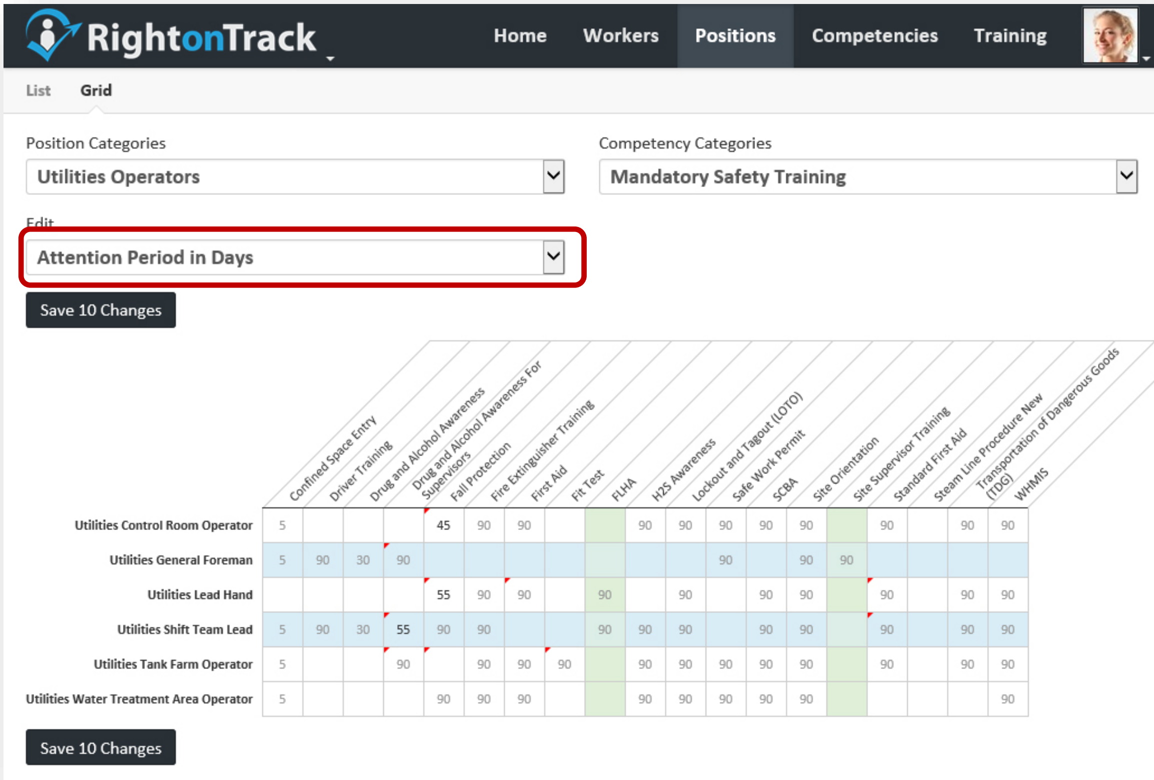
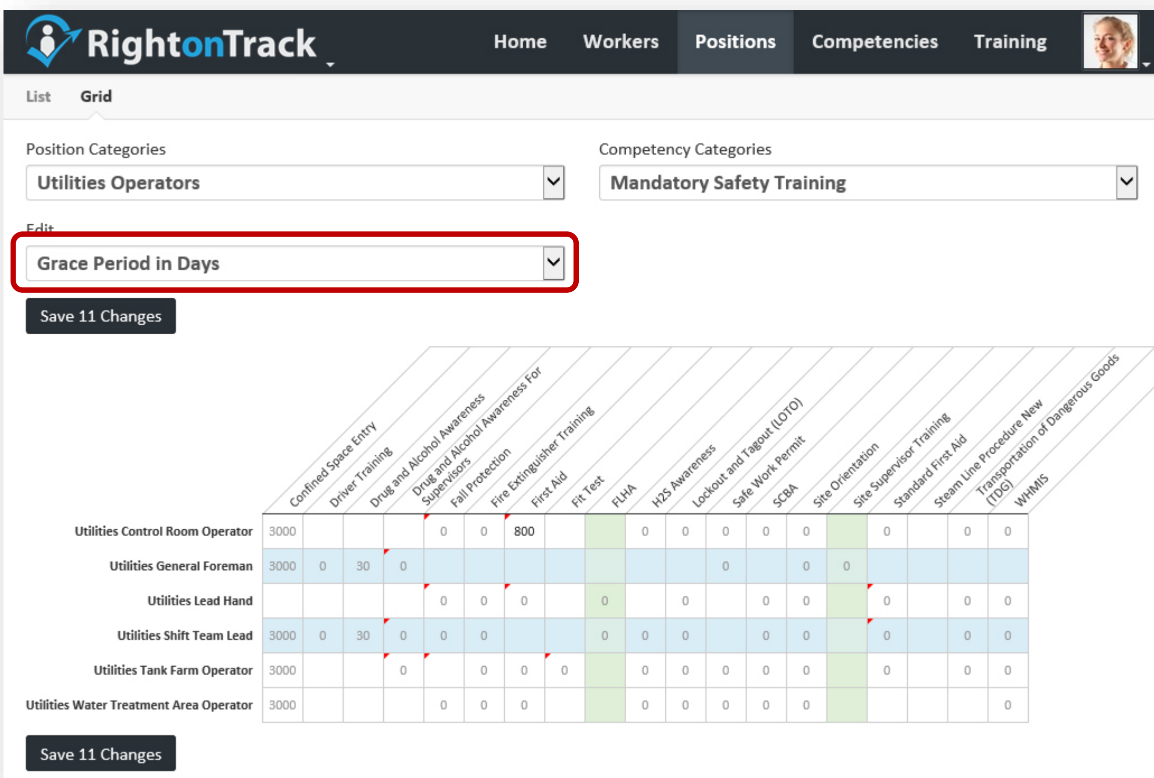
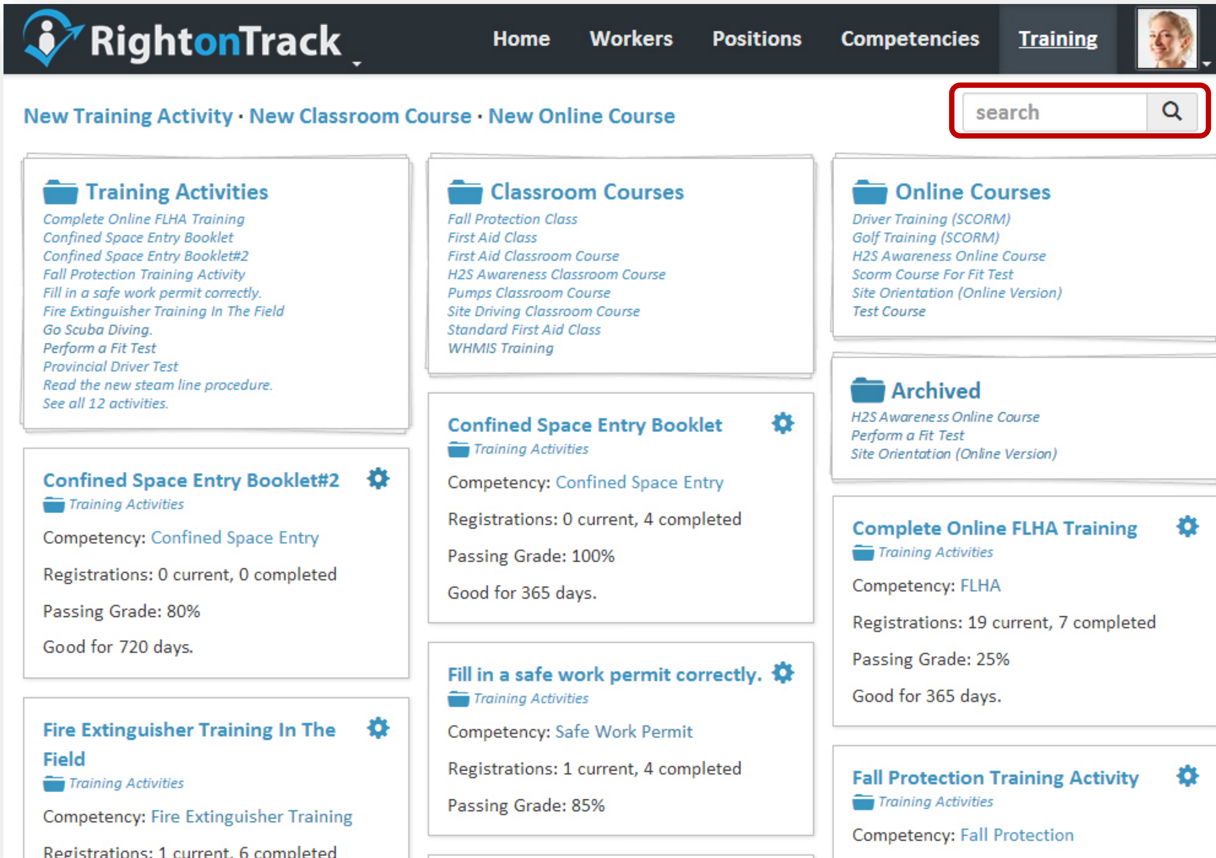




Find a Training Activity, Classroom Course, or Online Course

Click on the **"Training"** tab. Click the **search bar** and begin to type the name of the training item. The search bar will filter the information as you type.

Click on the title of the training item to view more information. Click on the gear beside the title to bring up the **"Settings"** page for that item.

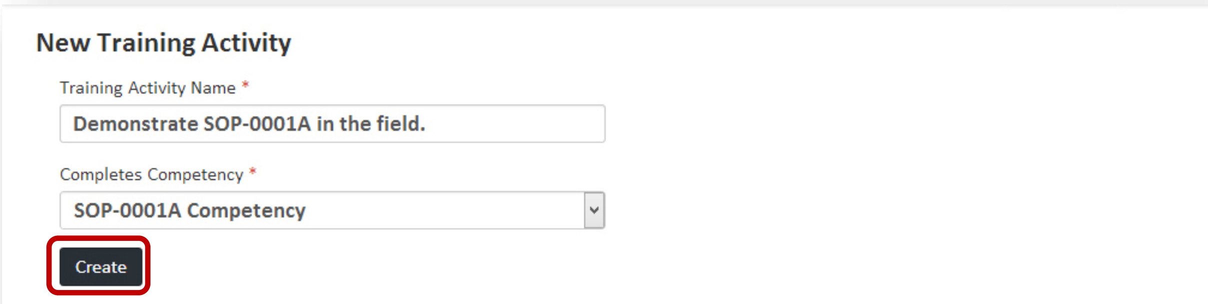


Note: Training is organized by category into folders, including training activities, classroom courses, online (SCORM) courses, and archived training. To search only the training activities, click on the **"Training Activities"** category. To search only the classroom courses, click on the **"Classroom Courses"** category. To search only the online courses, click on the **"Online Courses"** category. Archived activities and courses are listed under **"Archived."**

Create a New Training Activity

Click on the **"Training"** tab. Click on the **"New Training Activity"** link.

Enter the training activity name. Press the **"Create"** button and the **"Settings"** page for the newly created training activity will open.



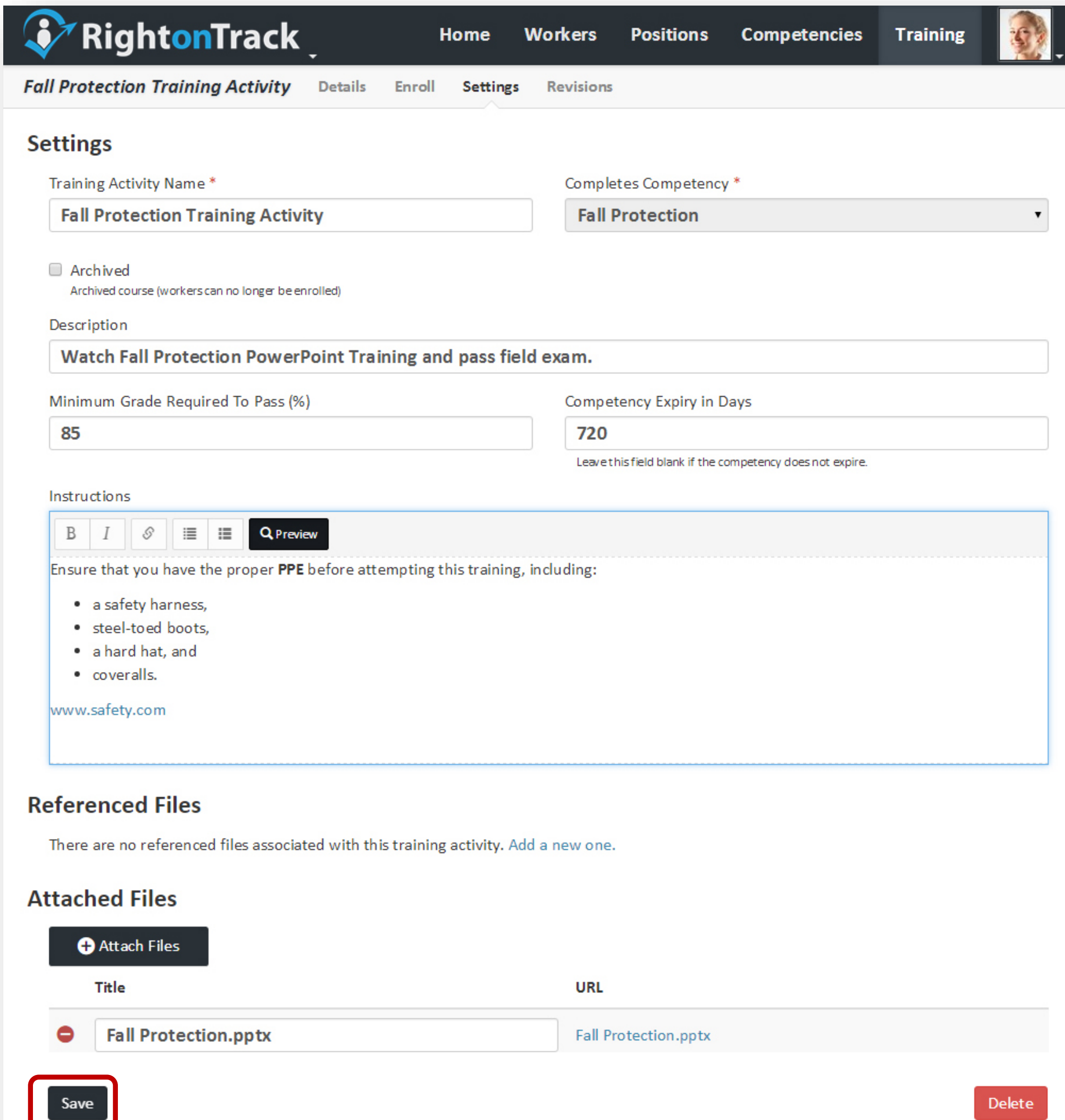
Edit a Training Activity

Click on the **"Training"** tab. Search to find the training activity you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the training activity.

From this page, you can edit the training activity details, including the name, the competency that it completes, whether or not it is archived, the description, the minimum grade required to pass, the competency expiry in days (if applicable), the instructions, and any referenced files for the training activity. Changing these items will retroactively affect previously completed competencies.

Click **"Add a new one."** to add the first referenced file, or press the button to add additional files. Click the **"Attach Files"** button to attach one or more files. Press the button to remove a referenced or attached file. When finished, press the **"Save"** button to save your changes.

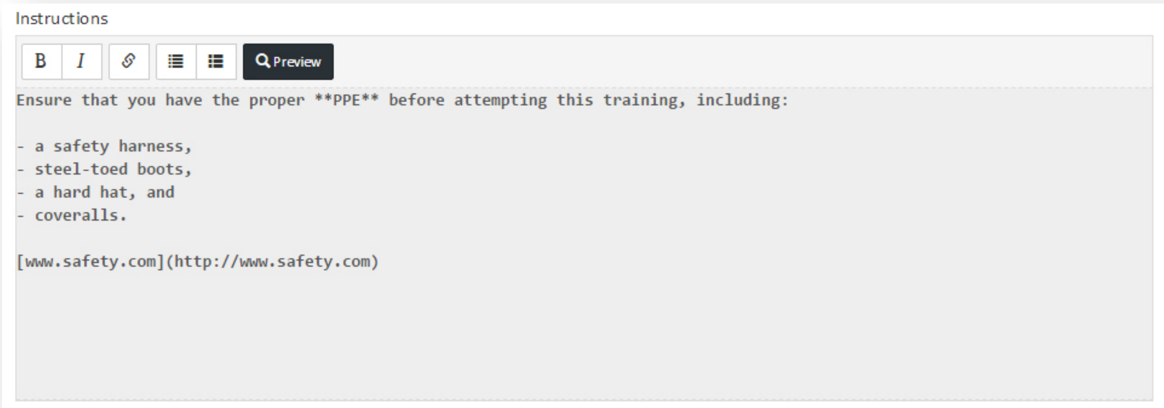
Note: The **"Details"** submenu tab shows the details that the workers will see.



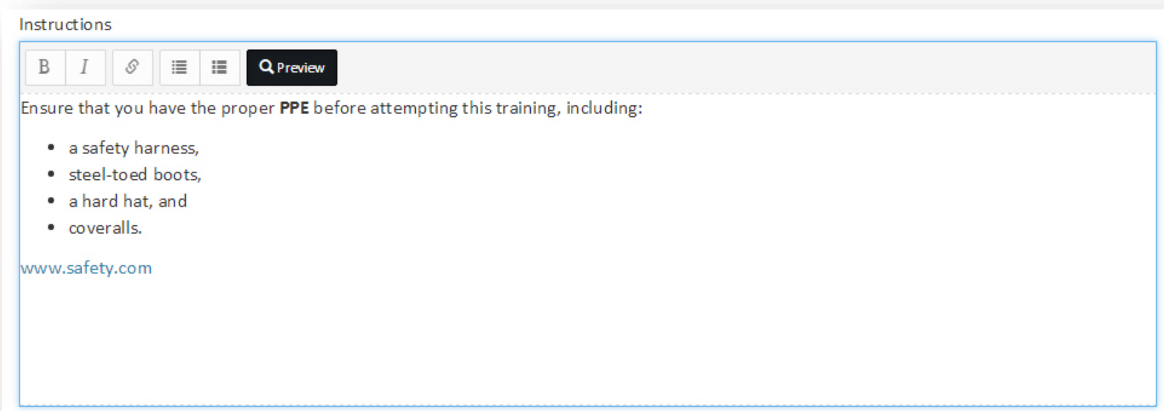
Training Activity Description Markup

Markup tags are used to add formatting to the training activity descriptions. This formatting includes **bold**, *italics*, hyperlinks, unordered lists (bullets), and ordered lists (1, 2, 3, …). The buttons at the top of the text box can be used to add this formatting, or the markup tags can be added manually.

A sample with markup tags is shown below:



The same text is shown in preview mode below:



Training Activity Revision Tracking

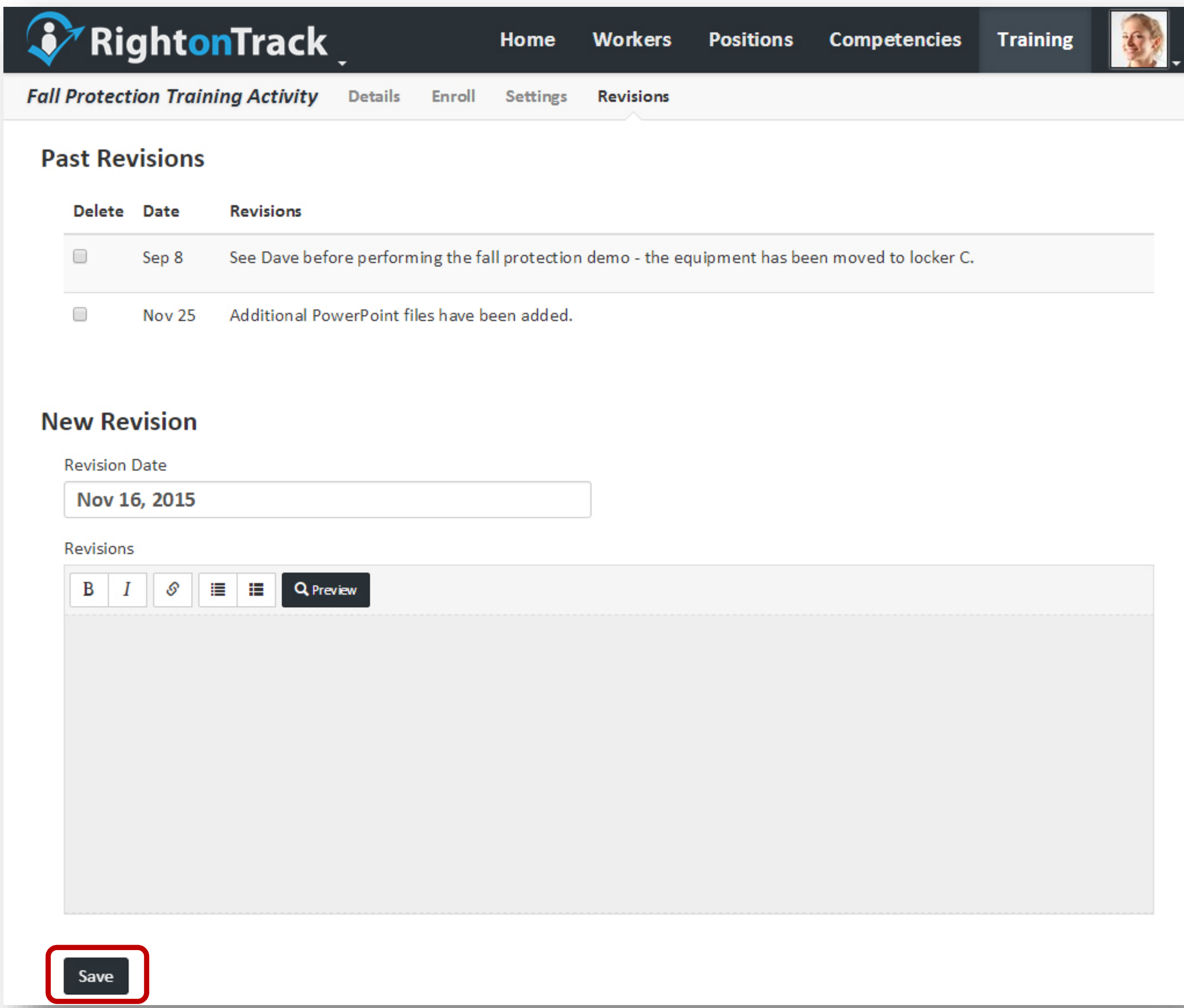
When making changes to the training activity, you can add revision notes so that trainees know what has been changed. For example, if a PowerPoint file or a video has been changed, or if details of a procedure have changed.

Click on the **"Training"** tab. Search to find the training activity you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the training activity. Click on the **"Revisions"** tab for the training activity.

Enter a description of the relevant changes, as well as the date when the changes were made. Press **"Save"** to save your changes.

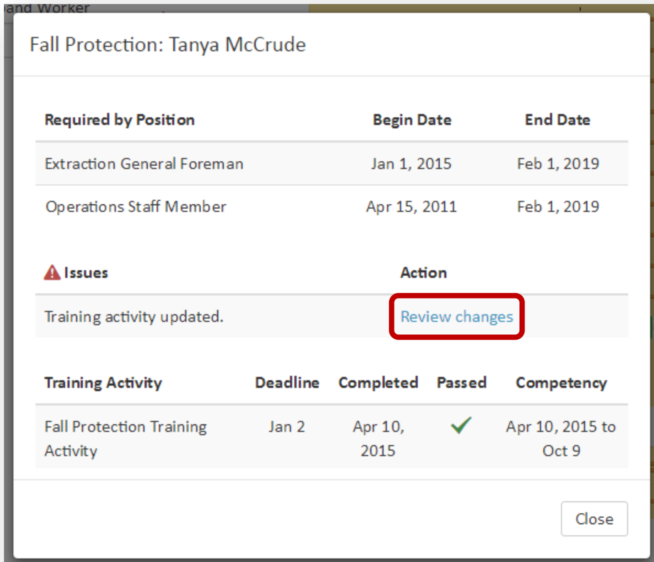
To delete a previously created revision note, click the **"Delete"** checkbox to the left of the revision, then press **"Save"** to save your changes.

Note: Each revision will need to be reviewed by the affected workers.

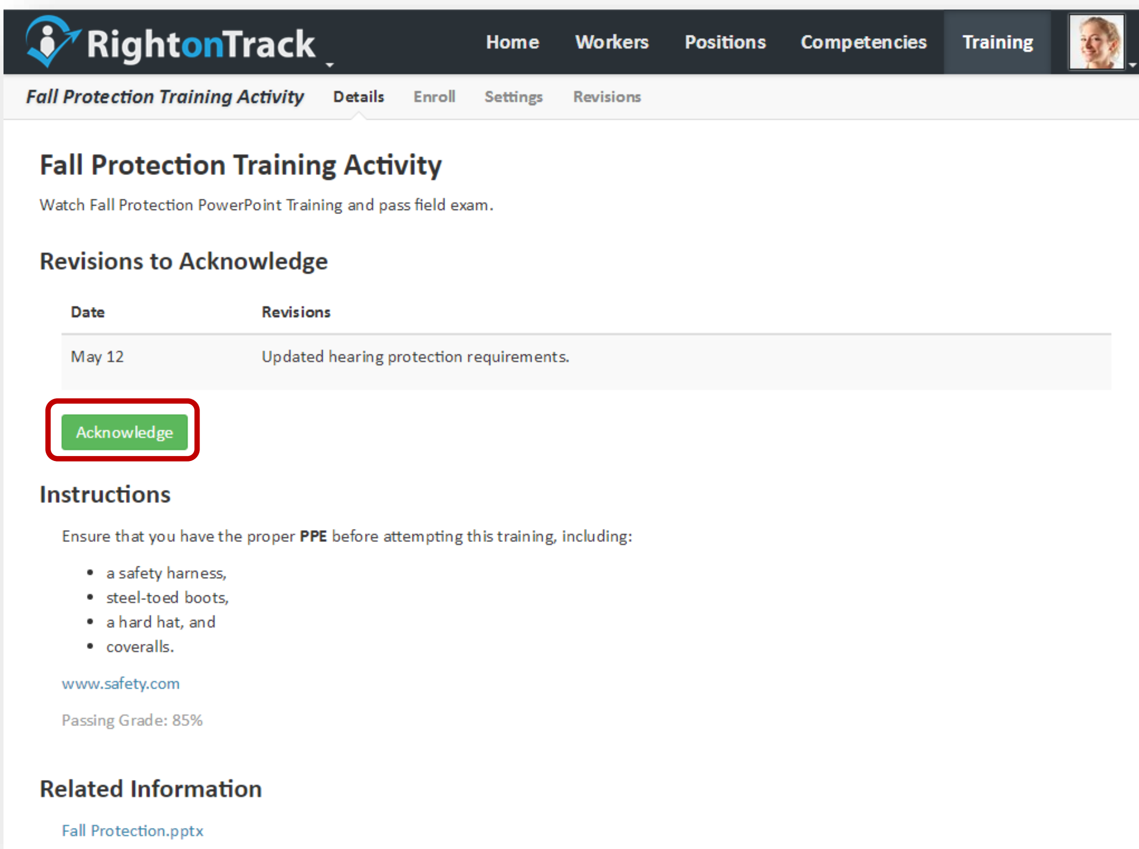


Review Changes for a Training Activity

Click on the warning icon (⚠) to display more information. If changes have been made to a competency, you will see a message under the "Issues" section. Click on **"Review Changes"**.



Review any changes to the instructions and any related information, then press **"Acknowledge**".



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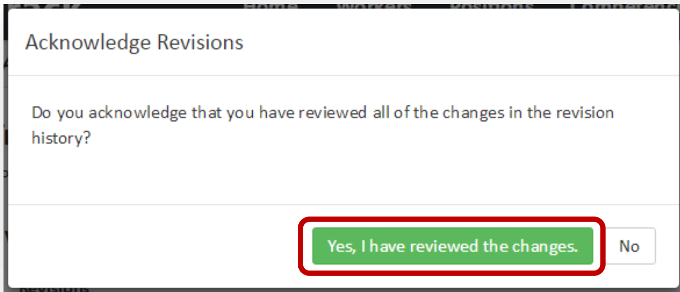
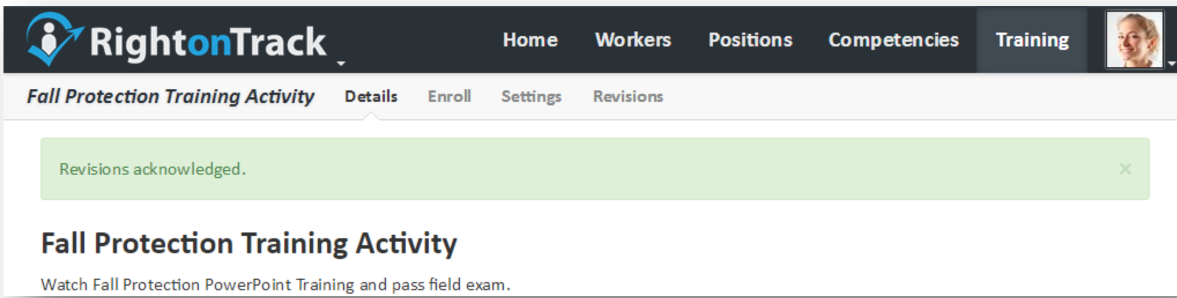
Confirm that you have reviewed the changes.



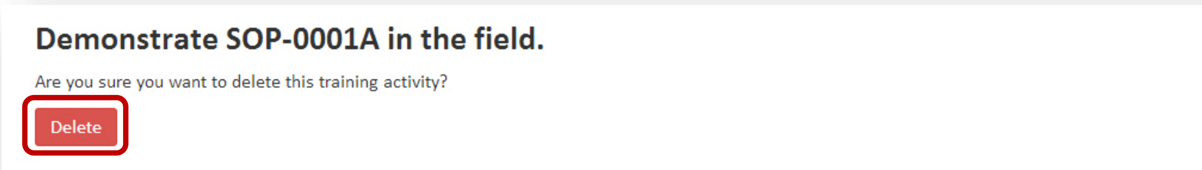
The training page will show that the revisions have been acknowledged. The associated warning icon (⚠) will disappear from the competencies page.



Delete or Archive a Training Activity

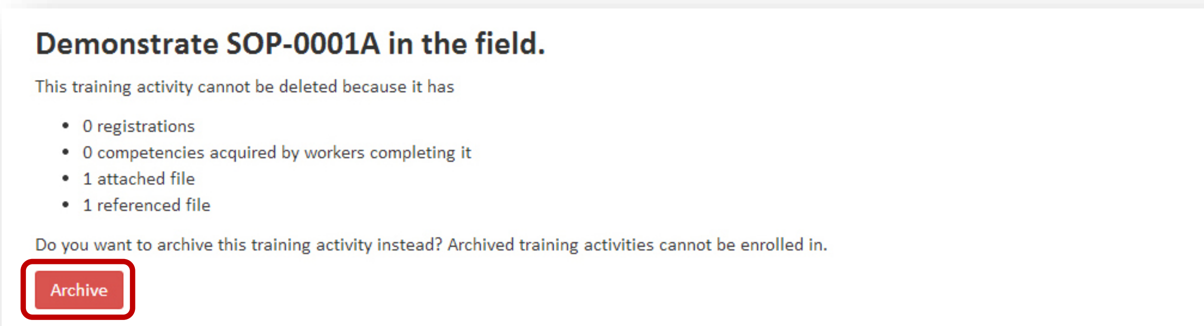
Click on the **"Training"** tab. Search to find the training activity you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the training activity.

Press the **"Delete"** button at the bottom right side of the page to delete the training activity. When prompted, press the **"Delete"** button to confirm.



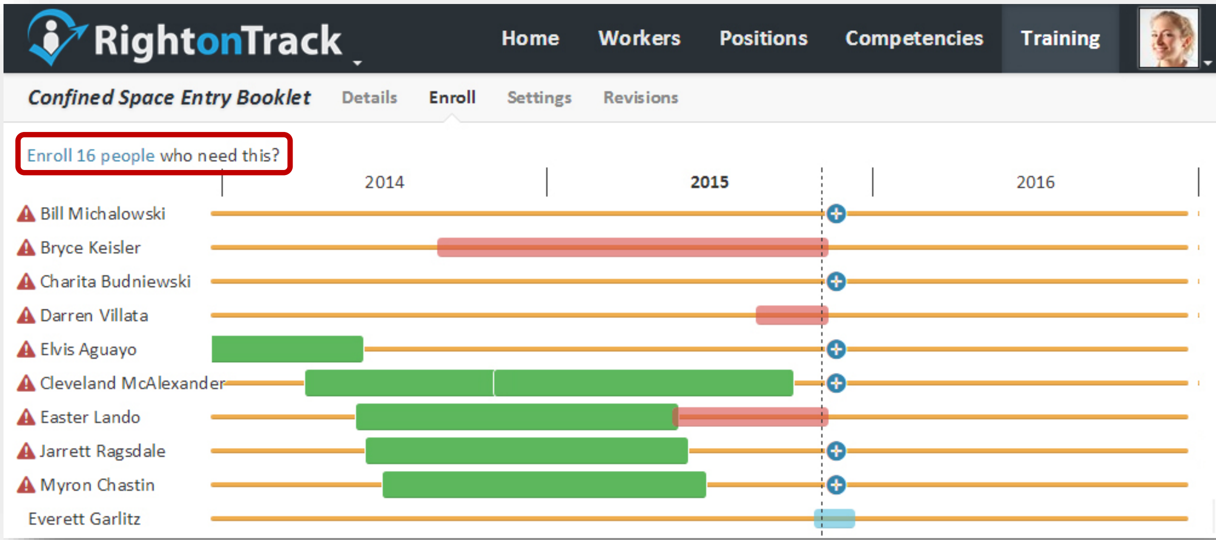
Note: You can cannot delete a training activity if it has any attached files, referenced files, enrollments, or worker competency completions. Instead, pressing the delete button in this case will prompt you to "archive" the training activity. See Archiving for more information.

When prompted, press the **"Archive"** button to archive the training activity. Alternatively, you can archive a training activity by checking the **"Archived"** checkbox on the training activity settings page.

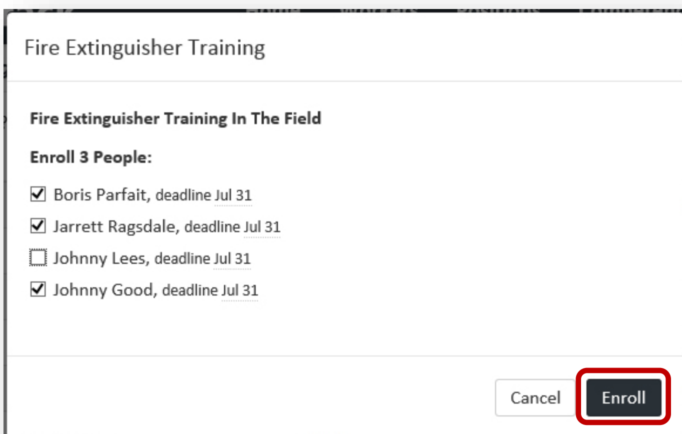


Enroll Workers in a Training Activity

Click on the **"Training"** tab. Search to find the training activity you wish to edit, then click on the title for the training activity. Click on the **"Enroll"** submenu tab.



To enroll multiple workers in a training activity, click on the **"Enroll # people who need this?"** link. Select or deselect workers to choose who should be enrolled in the training activity. The deadline will default to one month or the previous expiry date, whichever is sooner. Press the **"Enroll"** button to enroll the selected workers. To use a deadline other than one month, enroll the workers individually.



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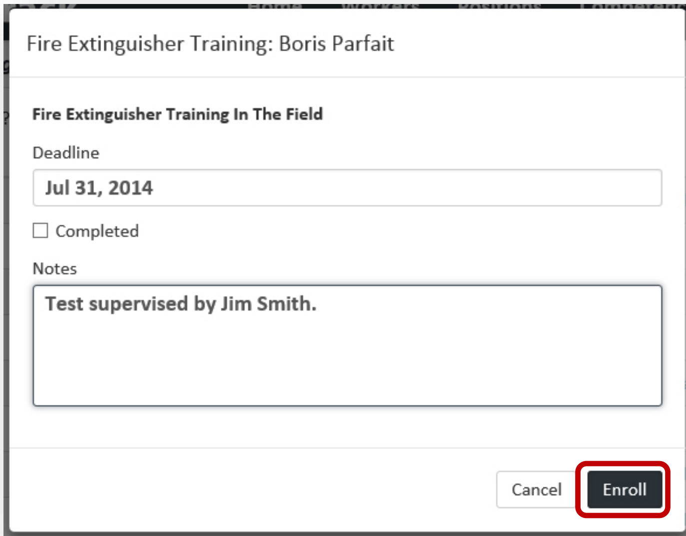
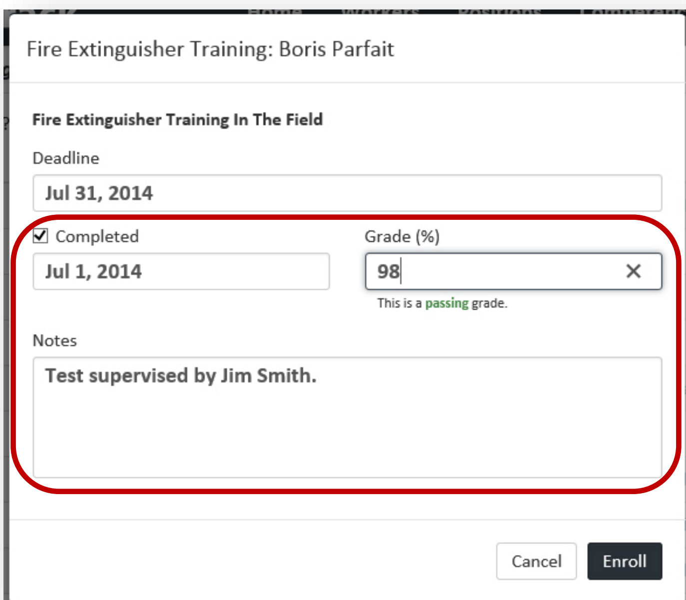
To enroll a worker in training, click the "Enroll" ( ) button beside the worker. Set a deadline and press **"Enroll"** to enroll the worker in the training activity.

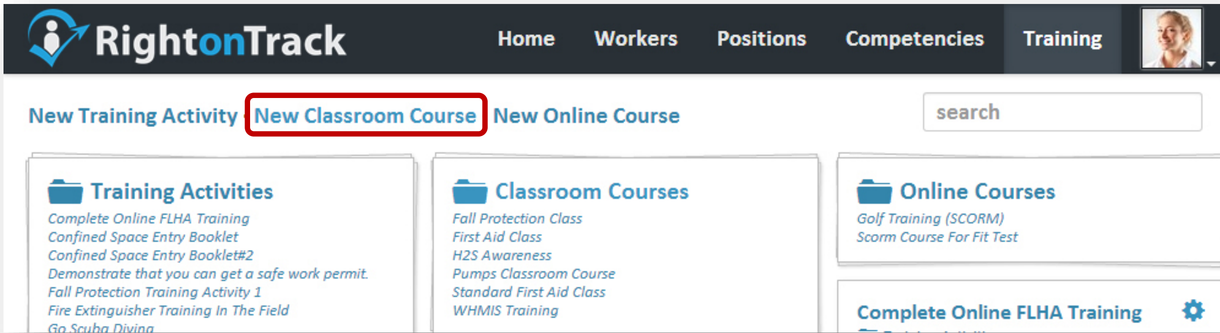


If the training activity is already complete, check **"Completed"** then enter the completion date and the score. The **"Notes"** field saves any notes relevant to this worker's training activity. Press **"Enroll"** to save the completion data.

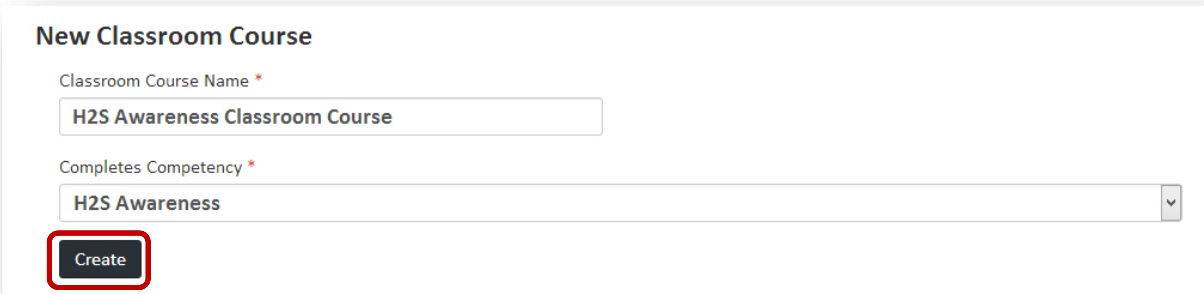


Create a New Classroom Course

Click on the **"Training"** tab. Click on the **"New Classroom Course"** link.



Enter the classroom course name. Press the **"Create"** button and the **"Settings"** page for the newly created classroom course will open.



Edit a Classroom Course

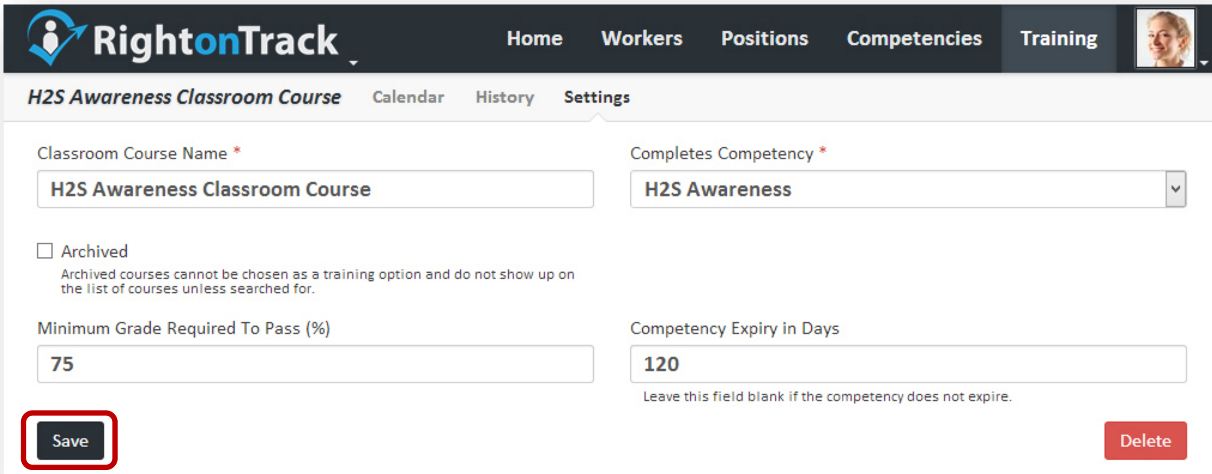
Click on the **"Training"** tab. Search to find the classroom course you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the classroom course.

From this page, you can edit the classroom course details, including the name, the competency that it completes, whether or not it is archived, the minimum grade required to pass, and the competency expiry in days (if applicable).

Leave the **"Competency Expiry In Days"** field blank if the competency is not required.

Note: Changing these items will retroactively affect previously completed competencies.

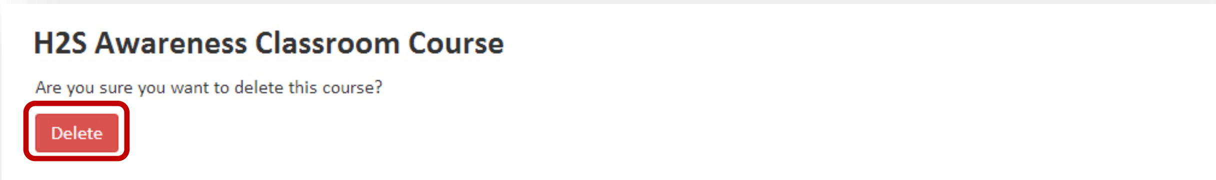
When finished, press the **"Save"** button to save your changes.



Delete or Archive a Classroom Course

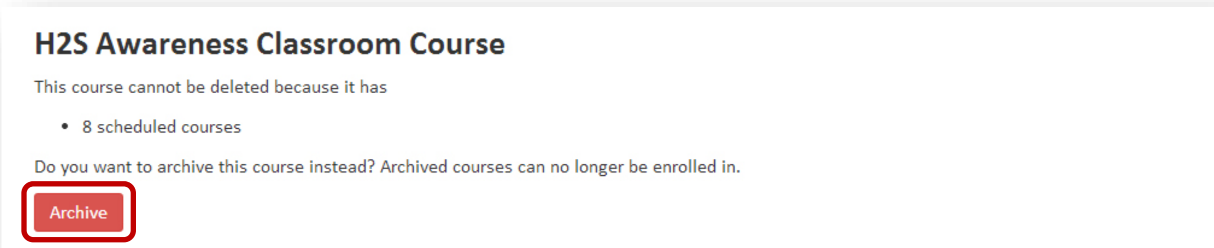
Click on the **"Training"** tab. Search to find the classroom course you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the classroom course.

Press the **"Delete"** button at the bottom right side of the page to delete the classroom course. When prompted, press the **"Delete"** button to confirm.



Note: You can cannot delete a classroom course if it has any scheduled courses, enrollments, or worker competency completions. Instead, pressing the delete button in this case will prompt you to "archive" the classroom course. See Archiving for more information.

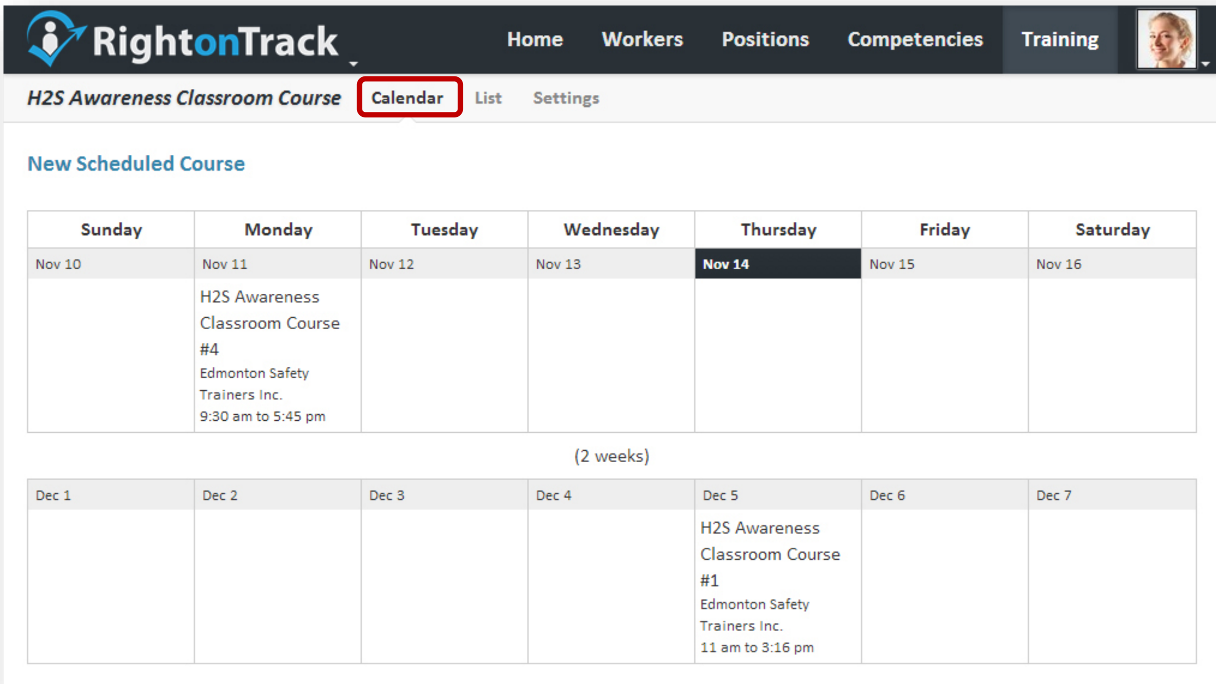
When prompted, press the **"Archive"** button to archive the classroom course. Alternatively, you can archive a classroom course by checking the **"Archived"** checkbox on the classroom course settings page.



View the Calendar for a Classroom Course

Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course.

Note: Only future scheduled courses are shown on the calendar. Click on the "List" submenu tab to view past scheduled courses or enter worker scores for a past scheduled course.



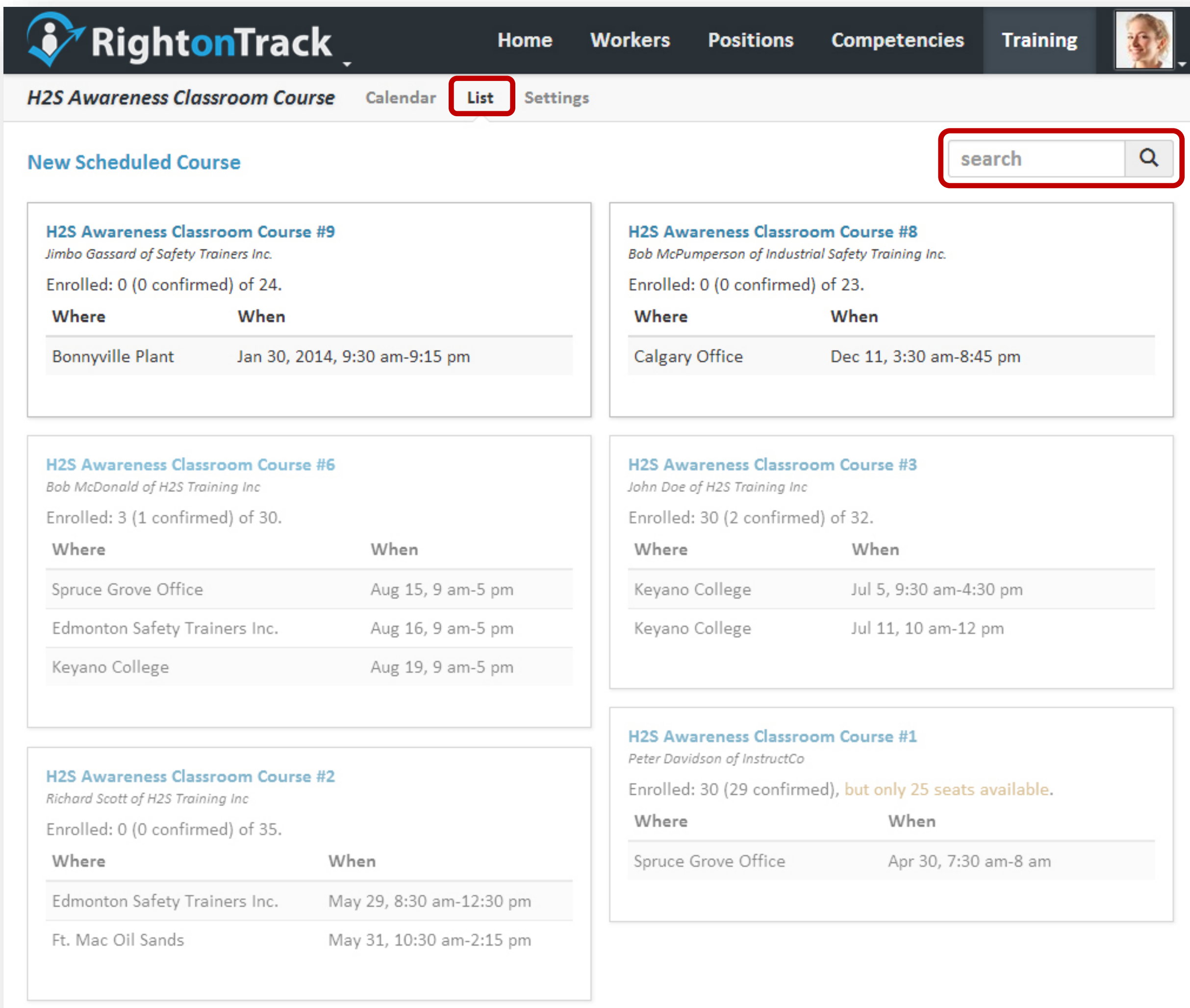
View the List of Scheduled Classes for a Classroom Course

Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click on the **"List"** submenu tab to open the list of scheduled courses.

Past scheduled courses are grayed out and scheduled courses are listed in order based on the creation date.

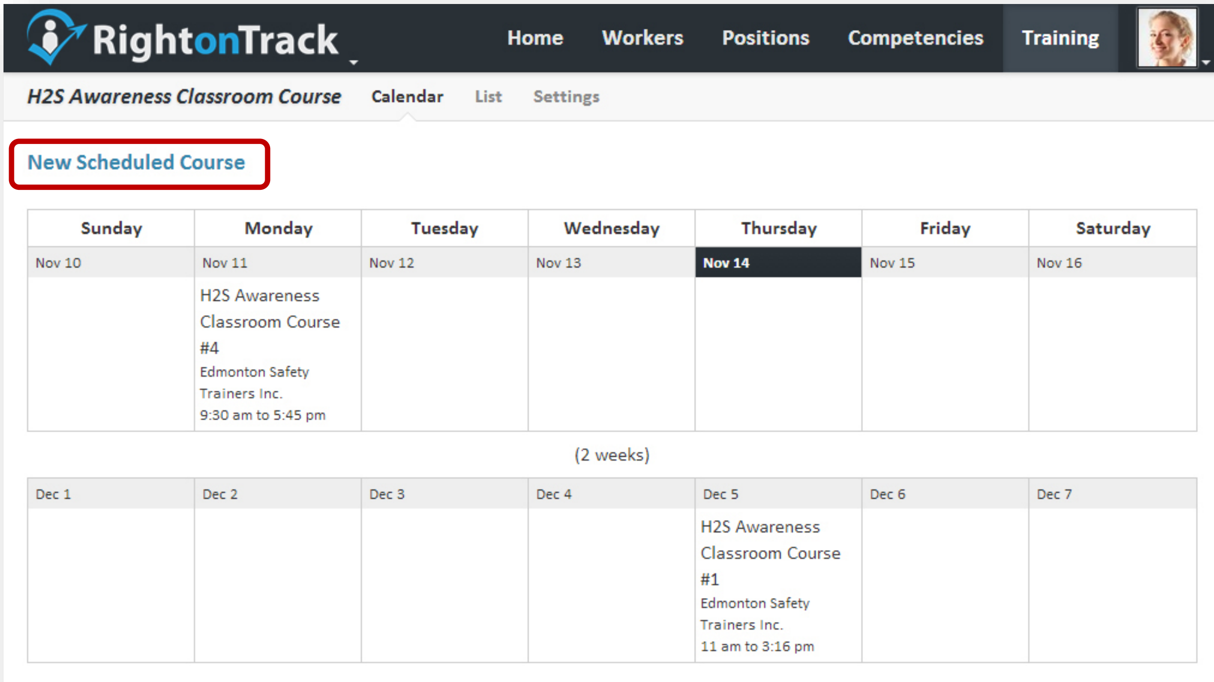
You can filter the scheduled course search results by typing a location, provider, or instructor in the search box.

Click on a scheduled course title to view more details about the scheduled course.



Create a New Scheduled Course (i.e. Schedule a Class)

Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click the **"New Scheduled Course"** link above the calendar. Alternatively, you can click the **"New Scheduled Course"** link on the **"List"** submenu tab.



Edit a Scheduled Course

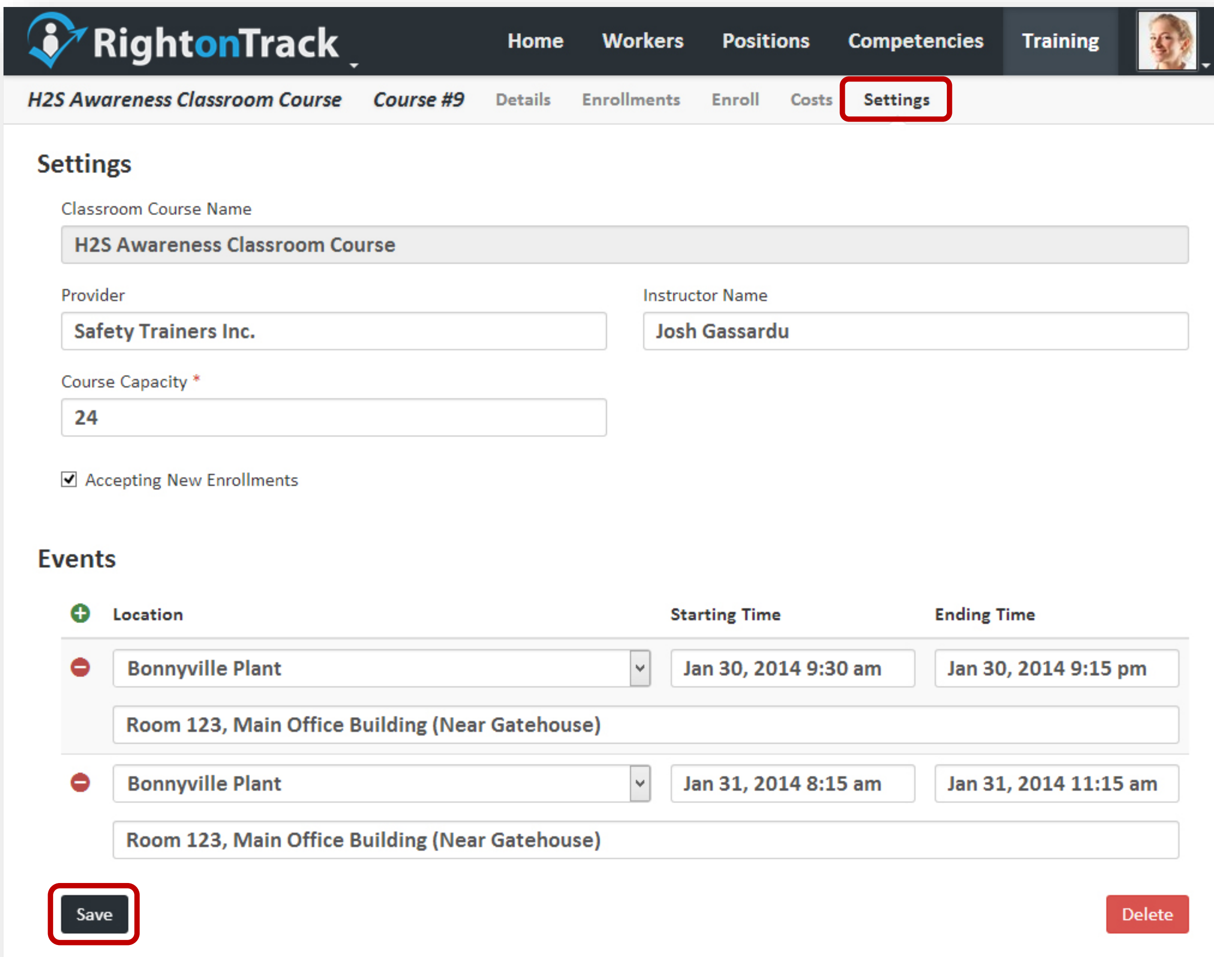
Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click on the **"List"** submenu tab to open the list of scheduled courses. Click on the scheduled course title to open the **"Enrollments"** submenu tab for the scheduled course.

Click on the **"Settings"** submenu tab to edit the scheduled course settings.

Each scheduled course should have one or more events (i.e., class times). Click **"Add a new one."** to add the first event, or press the button to add additional events. Press the button to remove an event.

When finished, press the **"Save"** button to save your changes.

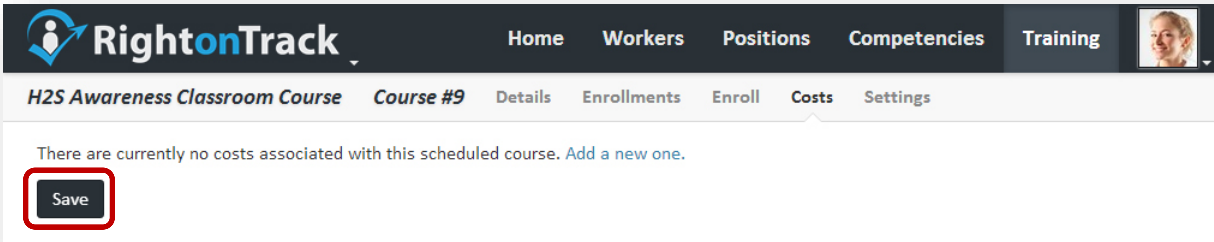
Note: The **"Details"** submenu tab shows the details that the workers will see.



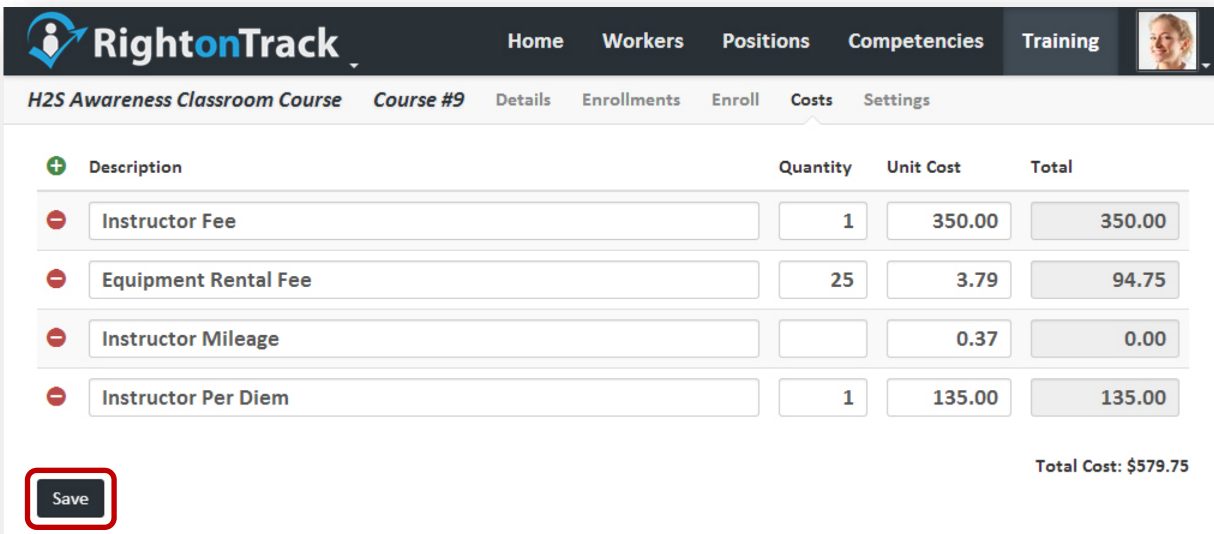
Add a Cost for a Scheduled Course

Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click on the **"List"** submenu tab to open the list of scheduled courses. Click on the scheduled course title to open the **"Enrollments"** submenu tab for the scheduled course.

Click on the **"Costs"** submenu tab to edit the scheduled course costs. Click **"Add a new one."** to add the first cost.



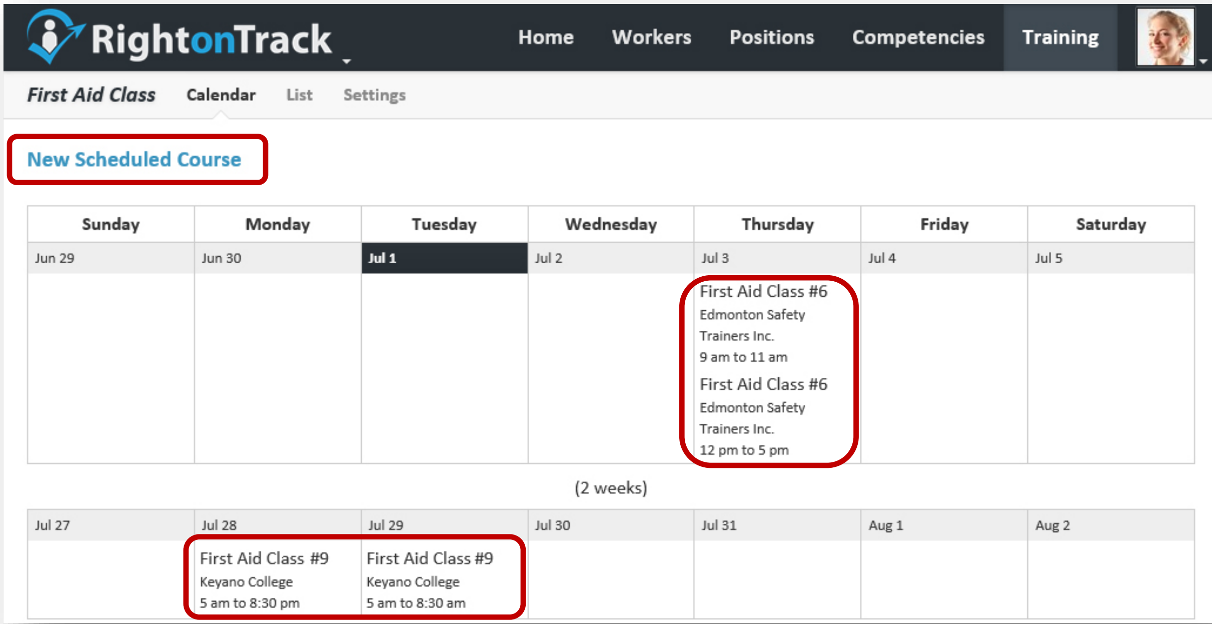
Press the button to add additional costs. Press the button to remove a cost.



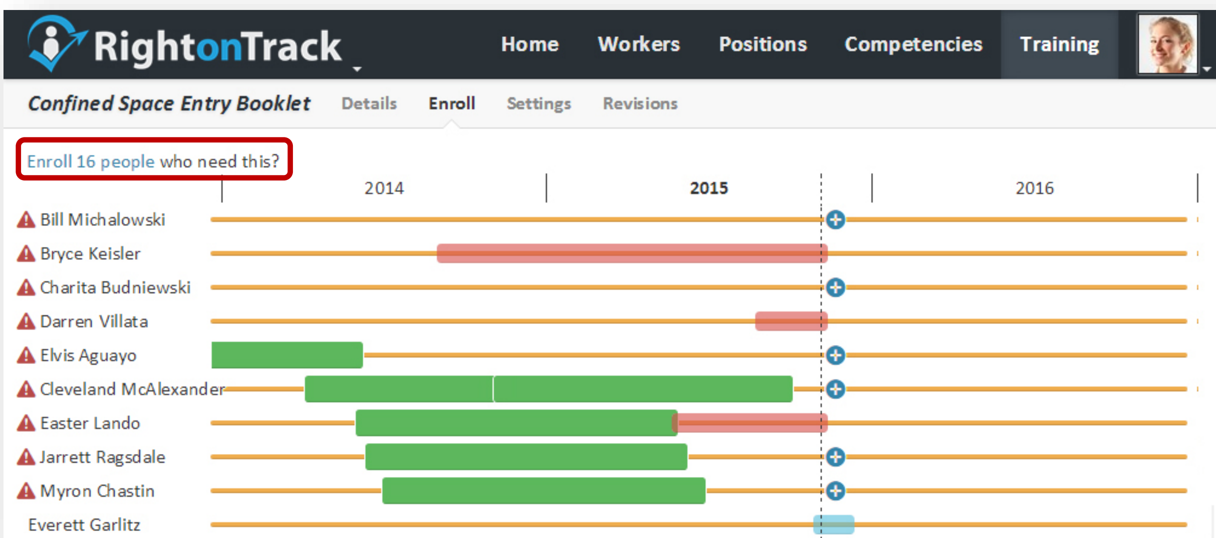
When finished, press the **"Save"** button to save your changes.

Enroll Workers in a Scheduled Course

Click on the **"Training"** tab. [Search] to find the classroom course, then click on the title to bring up the **"Calendar"** tab for the classroom course. On the calendar, click to select the scheduled course, or [create a new scheduled course].



Under the scheduled course, select the **"Enroll"** submenu tab.



Note: It is possible to enroll more workers than there are spots in the course. Enrolled, unconfirmed workers can act as a waiting list for the course.

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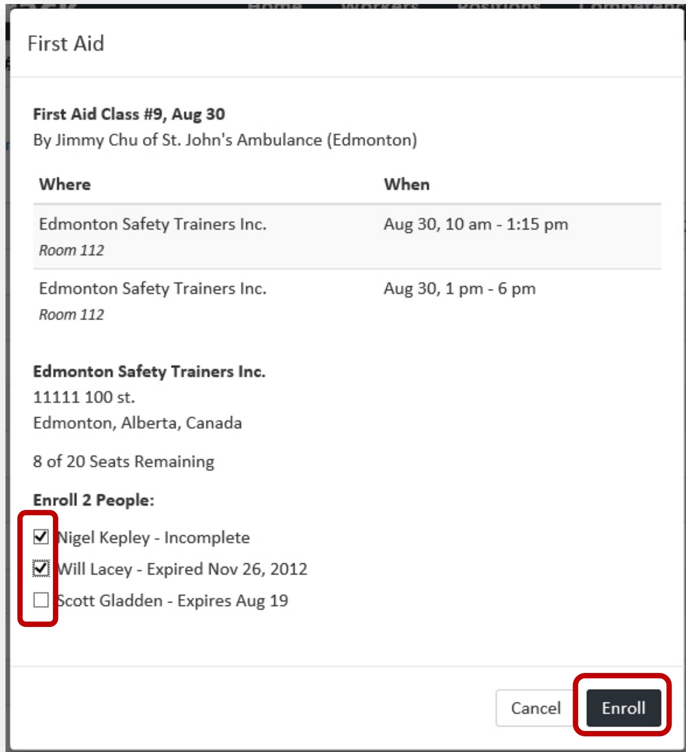
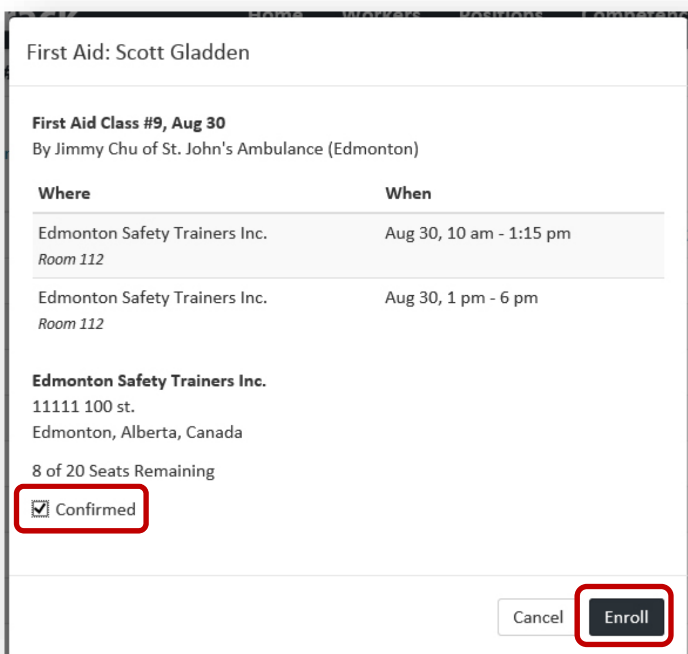
To enroll multiple workers in a scheduled course, click on the **"Enroll # people?"** link. Select or deselect workers to choose who should be enrolled in the scheduled course.



To enroll a worker in training, click the "Enroll" () button beside the worker. Confirm the worker's enrollment (optional) and press **"Enroll"** to enroll the worker in the course.



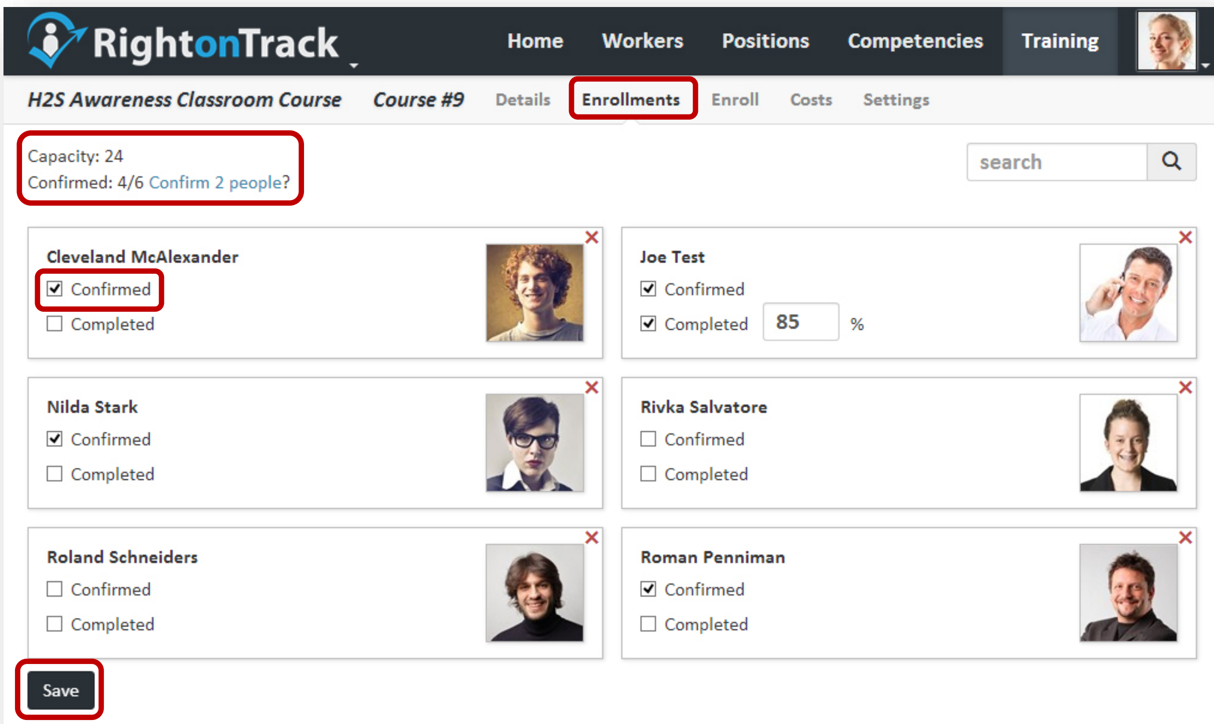
Confirm Workers in a Scheduled Course

Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click on the **"List"** submenu tab to open the list of scheduled courses. Click on the scheduled course title to open the **"Enrollments"** submenu tab for the scheduled course.

Click on **"Confirm # people?"** to confirm as many people as the course capacity will accept, starting with those who enrolled first. Alternatively, you can click **"Confirm"** for individual workers to confirm them.

Note: The system allows you to confirm more people than the course capacity. In this case, the **"Confirmed"** number will turn red to show that the course capacity has been exceeded.

When finished, press the **"Save"** button to save your changes.

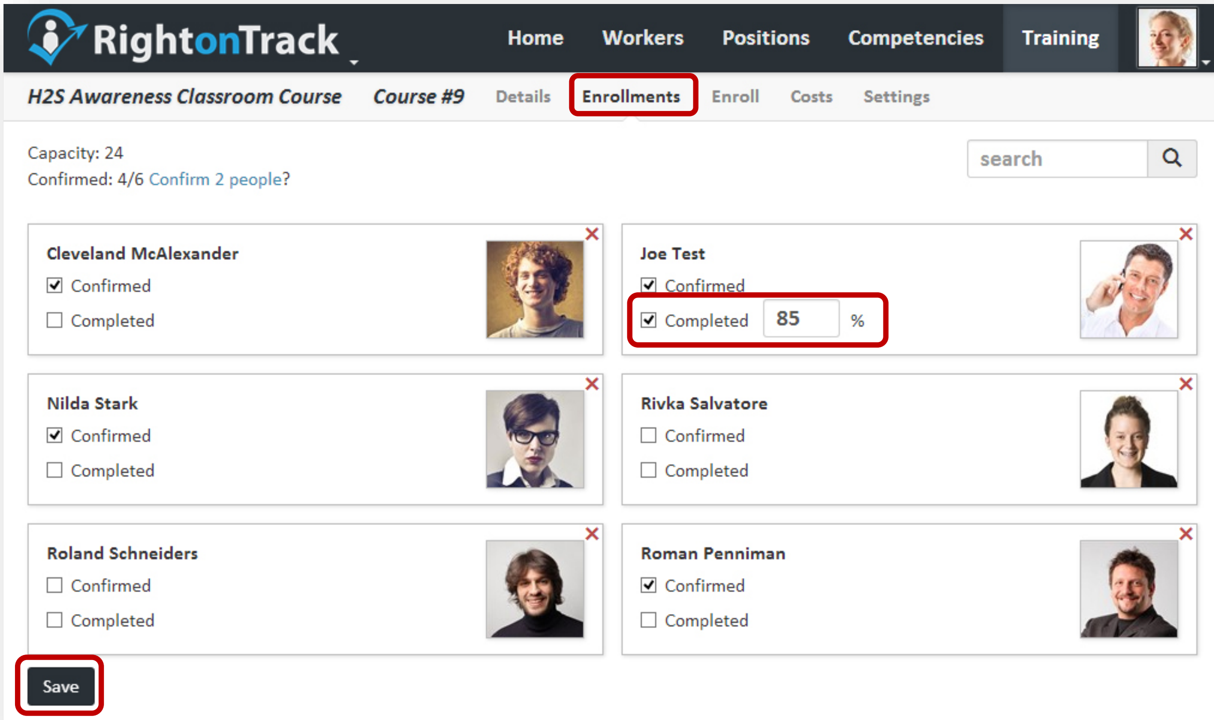


Enter Worker Scores for a Scheduled Course

Click on the **"Training"** tab. Search to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click on the **"List"** submenu tab to open the list of scheduled courses. Click on the scheduled course title to open the **"Enrollments"** submenu tab for the scheduled course.

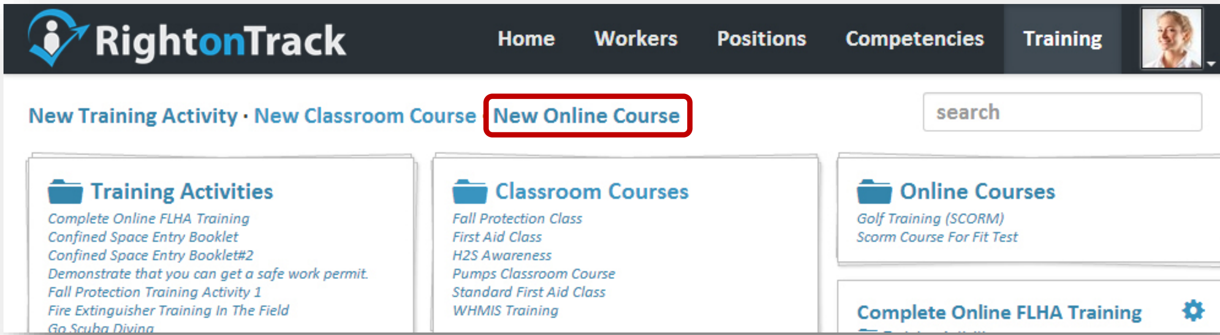
Click on **"Completed"** for the worker, then enter their score in the box.

When finished, press the **"Save"** button to save your changes.

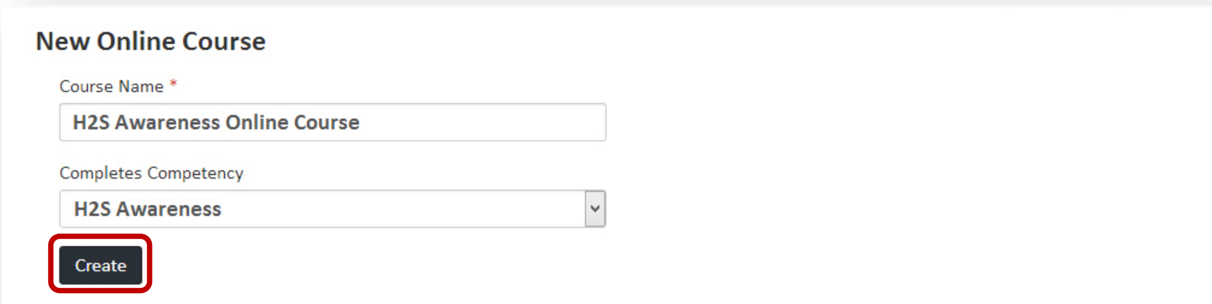


Create a New Online (SCORM) Course

Click on the **"Training"** tab. Click on the **"New Online Course"** link.



Enter the online course name. Press the **"Create"** button and the **"Settings"** page for the newly created online course will open.

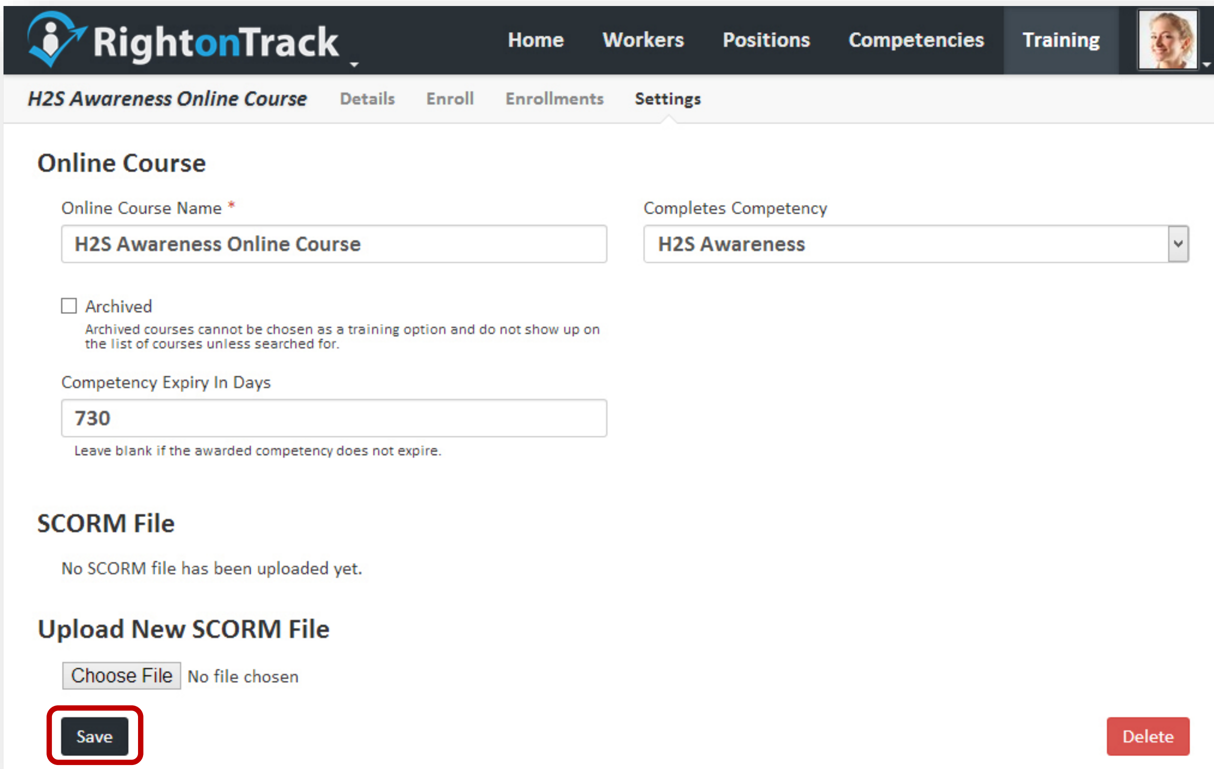


Edit an Online Course

Click on the **"Training"** tab. Search to find the online course you wish to edit, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the online course.

From this page, you can edit the online training details, including the name, the competency that it completes, whether or not it is archived, the competency expiry in days (if applicable), the SCORM file, and the Advanced SCORM Settings. Changing the value for competency expiry in days will retroactively affect previously completed competencies.

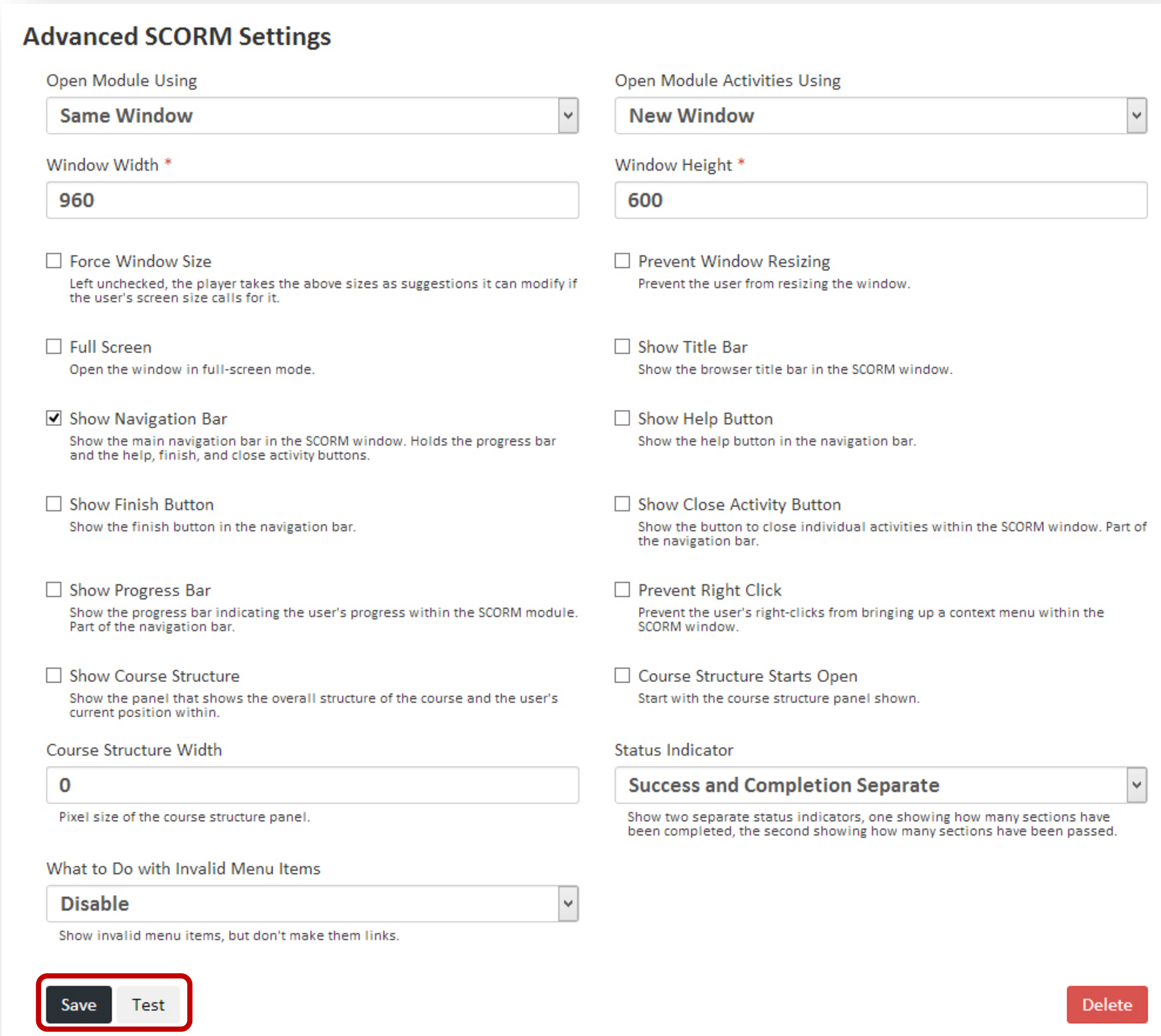
When finished, press the **"Save"** button to save your changes.



Edit an Online Course (Advance SCORM Settings)

After uploading a SCORM file, you can edit the **"Advanced SCORM Settings"** as shown below. These settings specify how the online course is displayed, such as the screen size, navigation bars, whether or not the course opens in a separate window, etc.

When finished, press the **"Save"** button to save your changes.



Test an Online Course

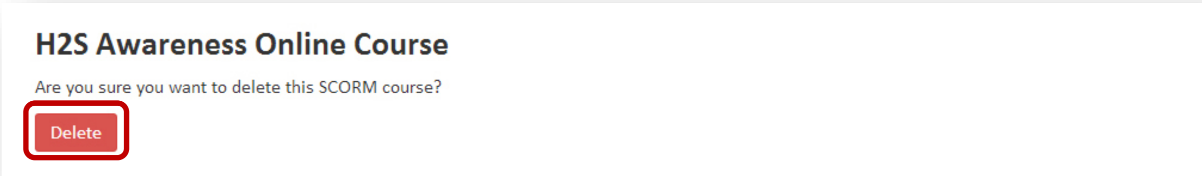
After upload a SCORM file, you can click on the "Test" button to make sure the SCORM file runs as expected.

Note: Your results will not be recorded when testing the online course.

Delete or Archive an Online Course

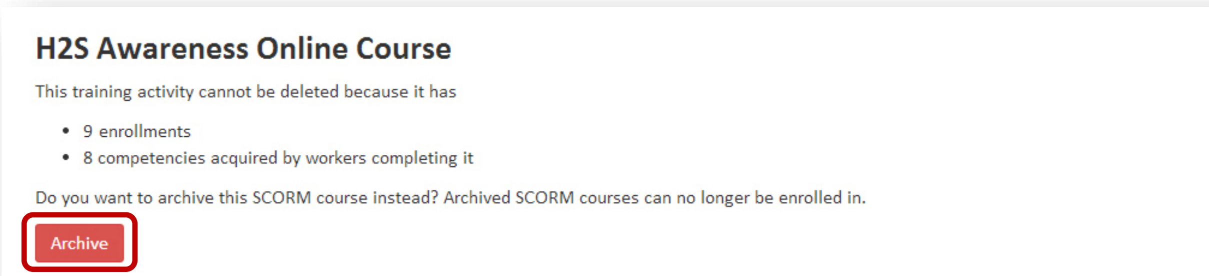
Click on the **"Training"** tab. Search to find the online course you wish to delete, then click on the gear icon ( ) beside the title to bring up the **"Settings"** tab for the online course.

Press the **"Delete"** button at the bottom right side of the page to delete the online course. When prompted, press the **"Delete"** button to confirm.



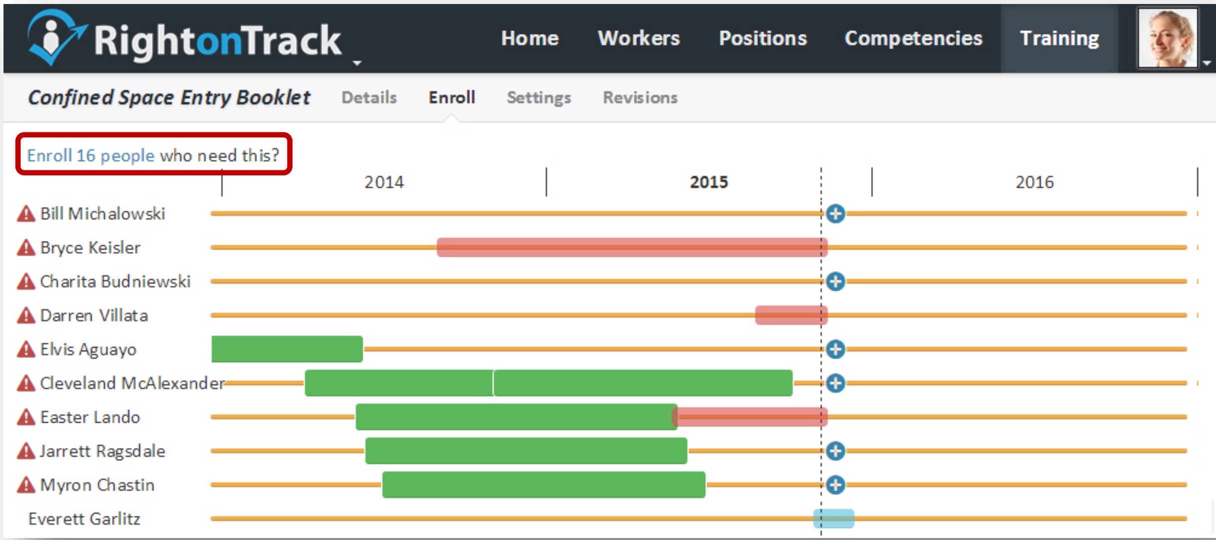
Note: You can cannot delete an online course if it has any attached SCORM files, enrollments, or worker competency completions. Instead, pressing the delete button in this case will prompt you to "archive" the online course. See Archiving for more information.

When prompted, press the **"Archive"** button to archive the online course. Alternatively, you can archive an online course by checking the **"Archived"** checkbox on the online course settings page.

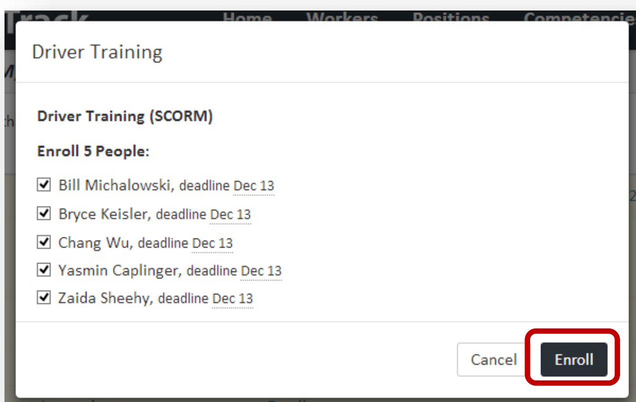


Enroll Workers in an Online Course

Click on the **"Training"** tab. Search to find the online course you wish to edit, then click on the title for the online course. Click on the **"Enroll"** submenu tab.



To enroll multiple workers in a training activity, click on the **"Enroll # people who need this?"** link. Select or deselect workers to choose who should be enrolled in the training activity. The deadline will default to one month or the previous expiry date, whichever is sooner. Press the **"Enroll"** button to enroll the selected workers. To use a deadline other than one month, enroll the workers individually.



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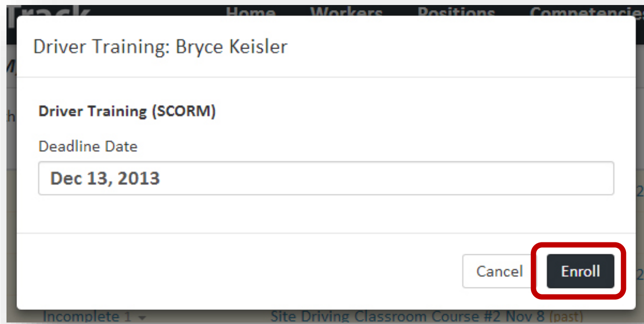
To enroll a worker in training, click the "Enroll" ( ) button beside the worker. Set a deadline for the online (SCORM) course and press **"Enroll"** to enroll the worker in the training activity.

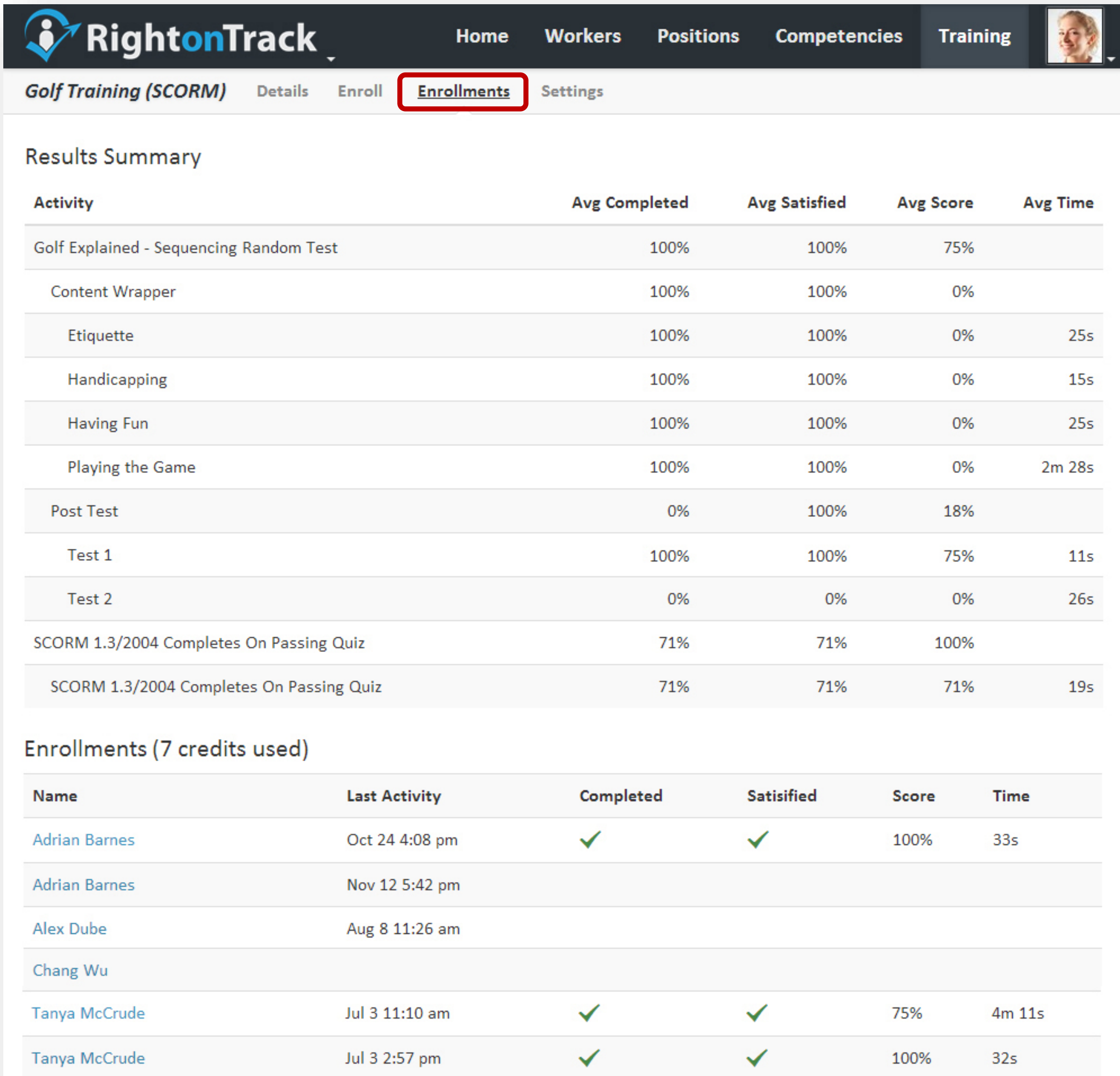


View Enrollment Details and Statistics for an Online Course

Click on the **"Training"** tab. Search to find the online course you wish to view, then click on the title for the online course. Click on the **"Enrollments"** submenu tab.

The **"Results Summary"** area shows the course activity details, including average percentage of workers who satisfied the section, average percentage of workers who completed the section, average score per section, and average time per section.

The **"Enrollments"** area shows details for each worker that has enrolled in the course, including the last activity date, completion status, satisfied date, score, and time spent.



Results Summary

Activity	Avg Completed	Avg Satisfied	Avg Score	Avg Time
Golf Explained - Sequencing Random Test	100%	100%	75%	
Content Wrapper	100%	100%	0%	
Etiquette	100%	100%	0%	25s
Handicapping	100%	100%	0%	15s
Having Fun	100%	100%	0%	25s
Playing the Game	100%	100%	0%	2m 28s
Post Test	0%	100%	18%	
Test 1	100%	100%	75%	11s
Test 2	0%	0%	0%	26s
SCORM 1.3/2004 Completes On Passing Quiz	71%	71%	100%	
SCORM 1.3/2004 Completes On Passing Quiz	71%	71%	71%	19s

Enrollments (7 credits used)

Name	Last Activity	Completed	Satisfied	Score	Time
Adrian Barnes	Oct 24 4:08 pm	✓	✓	100%	33s
Adrian Barnes	Nov 12 5:42 pm				
Alex Dube	Aug 8 11:26 am				
Chang Wu					
Tanya McCrude	Jul 3 11:10 am	✓	✓	75%	4m 11s
Tanya McCrude	Jul 3 2:57 pm	✓	✓	100%	32s

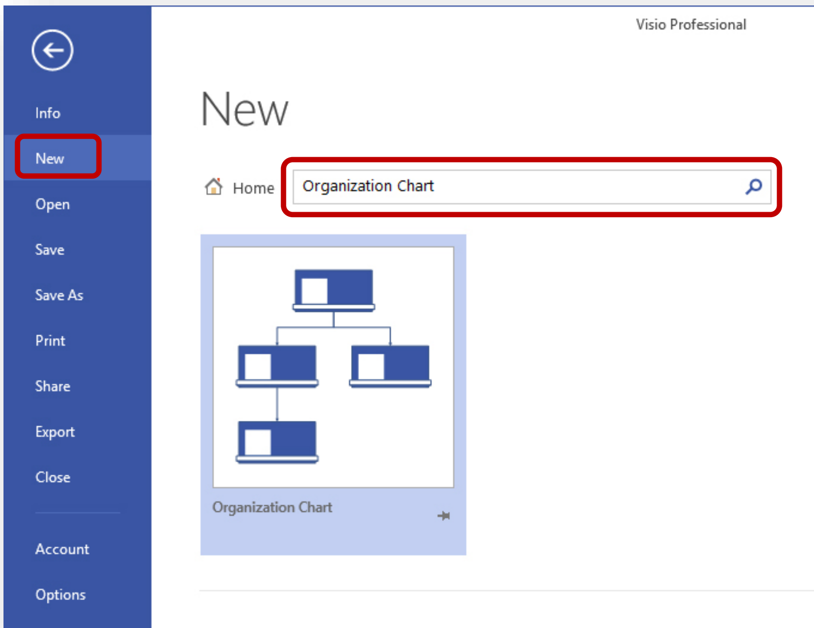
Use Microsoft Visio to Generate a Printable Organization Chart

Note: You must have Microsoft Visio 2013 installed in order to follow these instructions.

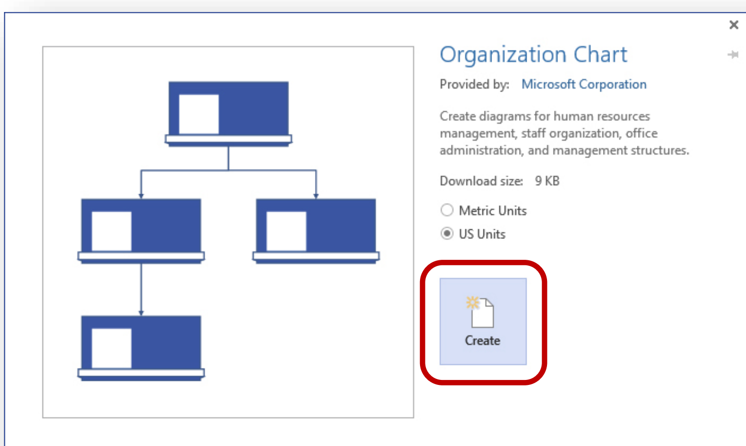
You can use Microsoft Visio to generate an organization chart from the **"Organization Structure"** report using the following steps:

1) Generate an "Organization Structure" report in Right On Track. Save the report and make a note of the report location.

2) Open Visio. Search for **"Organization Chart"** then click to open the chart wizard.



3) Choose **"Create"**.



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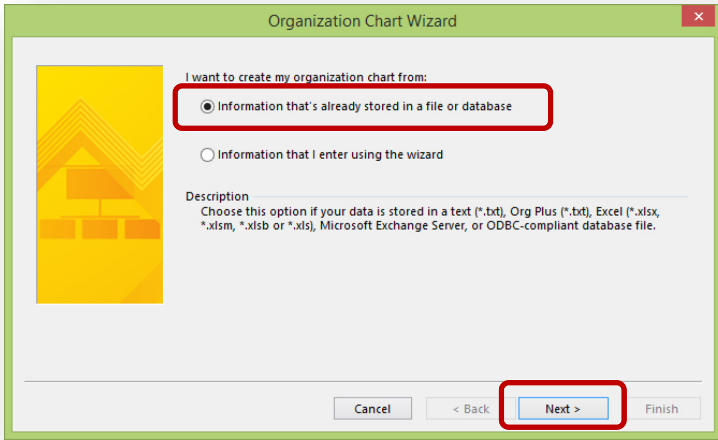
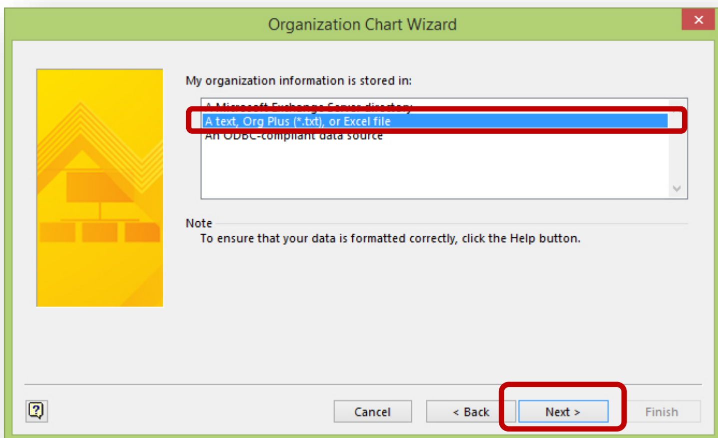
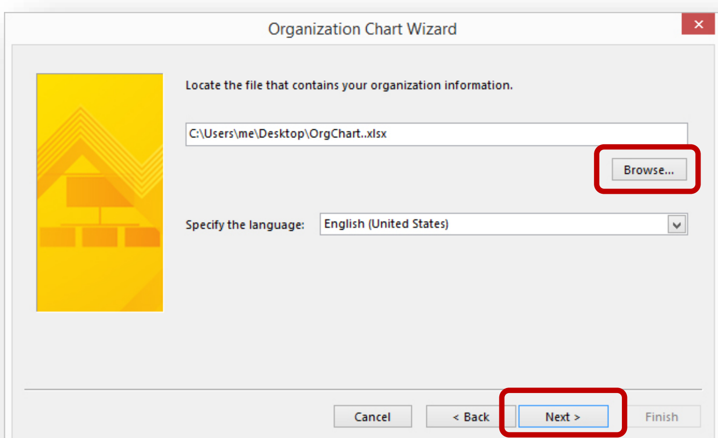
4) Choose "Information that's already stored in a file or database" and press **"Next >"**.



5) Choose "A text, Org Plus (*.txt), or Excel file" and press **"Next >"**.



6) Browse to select the report which you created in Step 1 and press **"Next >"**.



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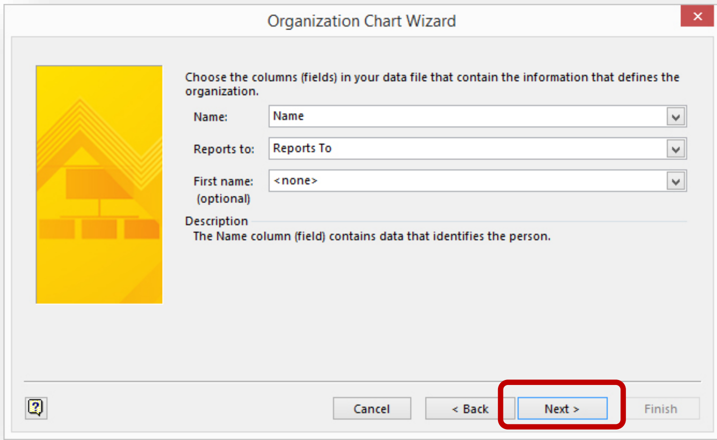
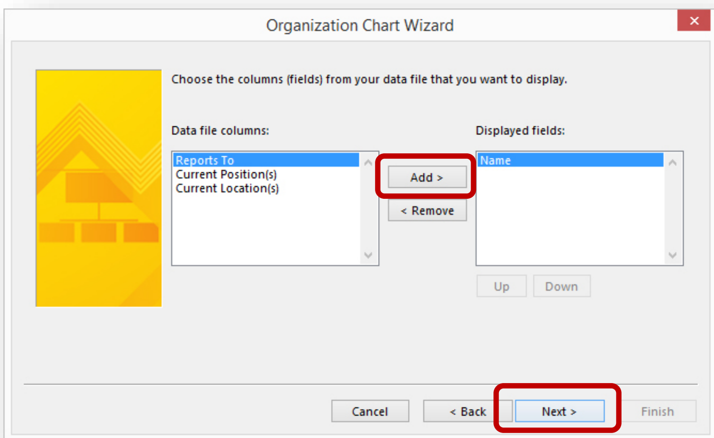
7) Press **"Next >"**.



8) Add the "Current Positions" and/or "Locations" if you want this data included in the organization chart then press **"Next >"** when finished. Press **"Next >"** again to accept the shape data fields.



9) Select pictures if you wish (optional), then press **"Next >"** again. Press **"Next >"** one more time, then press **"Finish"** to generate the chart.

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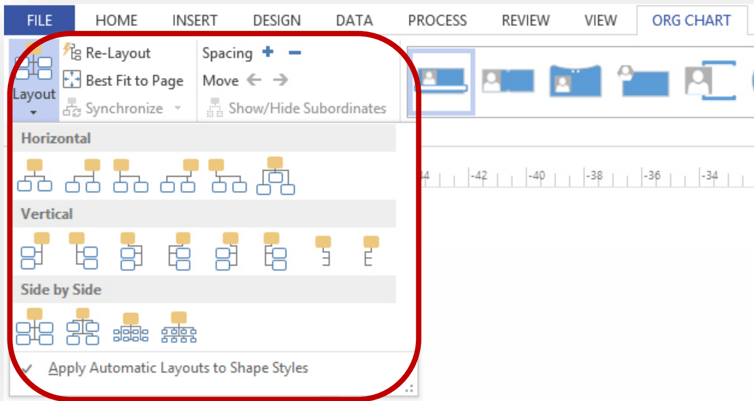
10) Tweak the chart layout as desired. You may wish to adjust the page size, the layout, the shape used for each person, etc.

After changing the layout mode (e.g. to "Stagger Mode"), select "Re-Layout" then "Best Fit to Page" to improve the chart layout.



11) A sample section of the final chart is shown below: