



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**".

A screenshot of the RightOnTrack sign-up form. The header shows the RightOnTrack logo and a 'Sign In' link. Below the header, there are two tabs: 'Sign in' and 'Create new account'. The 'Create new account' tab is selected. The form contains three input fields: 'Email Address *', 'Password *', and 'Confirm Password *'. At the bottom of the form, there is a 'Create Account' button, which is highlighted with a red rectangular box.

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"**.

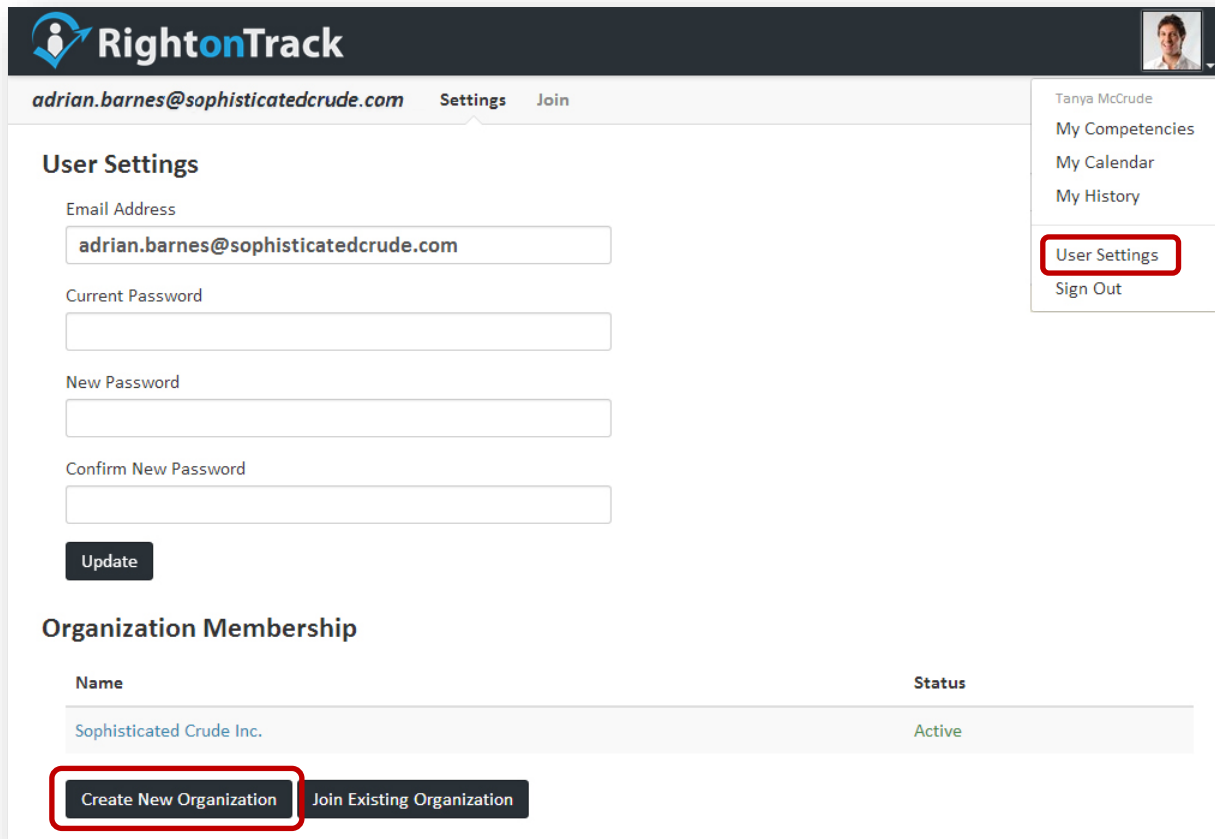


Enter your email address and password, then click **"Sign In"**.

A screenshot of the RightOnTrack sign-in page. The header shows the RightOnTrack logo on the left and a 'Sign In' link on the right. The main content area has two tabs: 'Sign in' (selected) and 'Create new account'. Below the tabs are two input fields: 'Email Address' and 'Password'. Below the 'Password' field is a link that says 'Forgot password?'. Below that is a checkbox labeled 'Remember Me?'. At the bottom of the form is a 'Sign In' button, which is highlighted with a red rectangular box.

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.



RightonTrack

adrian.barnes@sophisticatedcrude.com Settings Join

User Settings

Email Address
adrian.barnes@sophisticatedcrude.com

Current Password

New Password

Confirm New Password

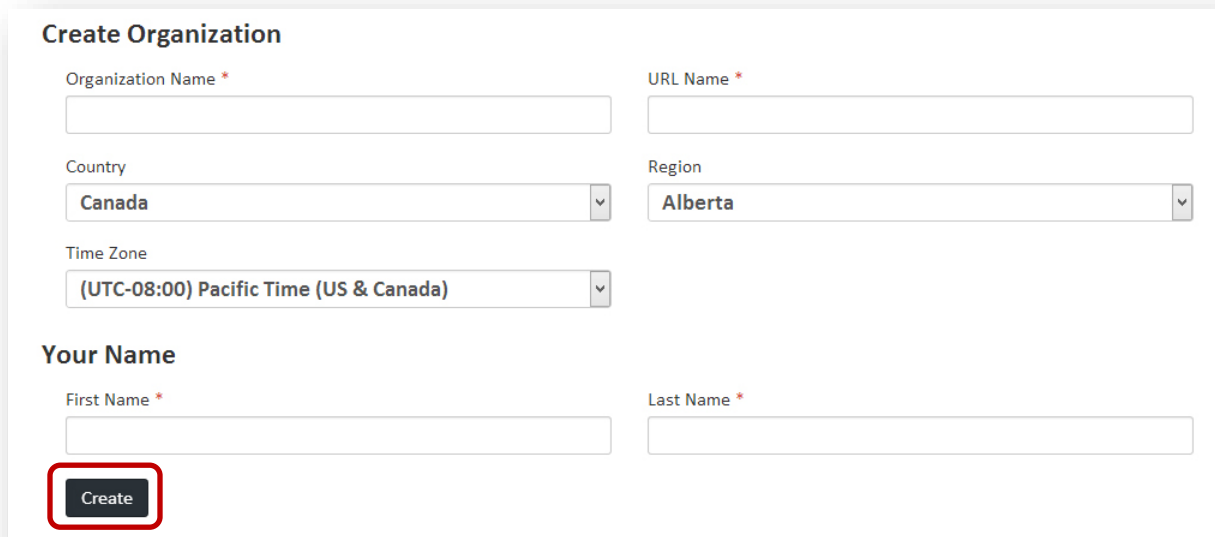
Update

Organization Membership

Name	Status
Sophisticated Crude Inc.	Active

Create New Organization Join Existing Organization

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.



Create Organization

Organization Name * URL Name *

Country Country Region Region

Canada Alberta

Time Zone Time Zone

(UTC-08:00) Pacific Time (US & Canada)

Your Name

First Name * Last Name *

Create

Change My Password or Switch Organizations

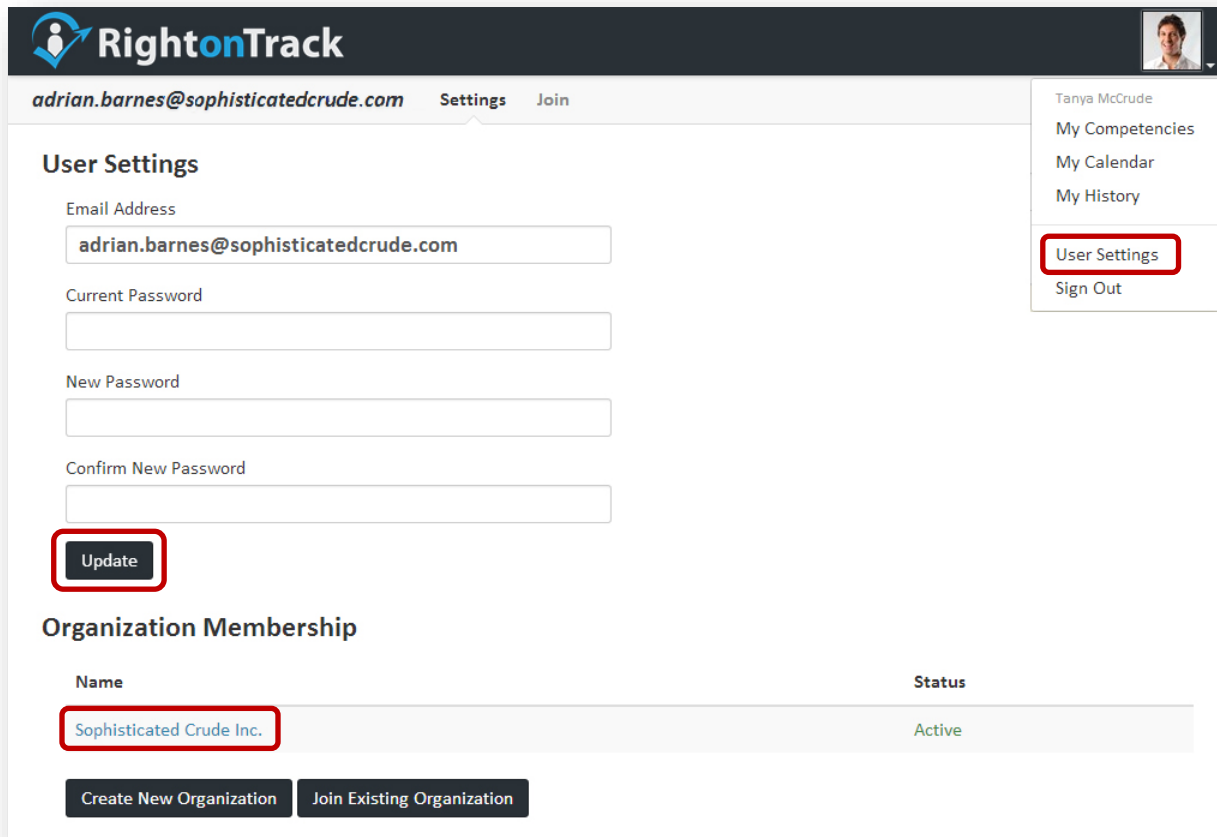
Click on your picture in the upper right corner. Choose **"User Settings"** from the dropdown list.

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.



RightOnTrack

adrian.barnes@sophisticatedcrude.com Settings Join

User Settings

Email Address
adrian.barnes@sophisticatedcrude.com

Current Password

New Password

Confirm New Password

Update

Organization Membership

Name	Status
Sophisticated Crude Inc.	Active

Create New Organization Join Existing Organization

Tanya McCrude
My Competencies
My Calendar
My History
User Settings
Sign Out

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](#)

RightOnTrack

tanya@sophisticatedcrude.com Settings Join

User Settings

Email Address
tanya@sophisticatedcrude.com

Current Password

New Password

Confirm New Password

Update

Tanya McCrude
My Competencies
My Calendar
My History
User Settings
Sign Out

Organization Memberships

Name	Status	Actions
Sophisticated Crude Inc.	Active	Deactivate
Widgets	Active	Deactivate
Example Company	Deactivated	Reactivate · Delete Forever

Create New Organization Join Existing 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.

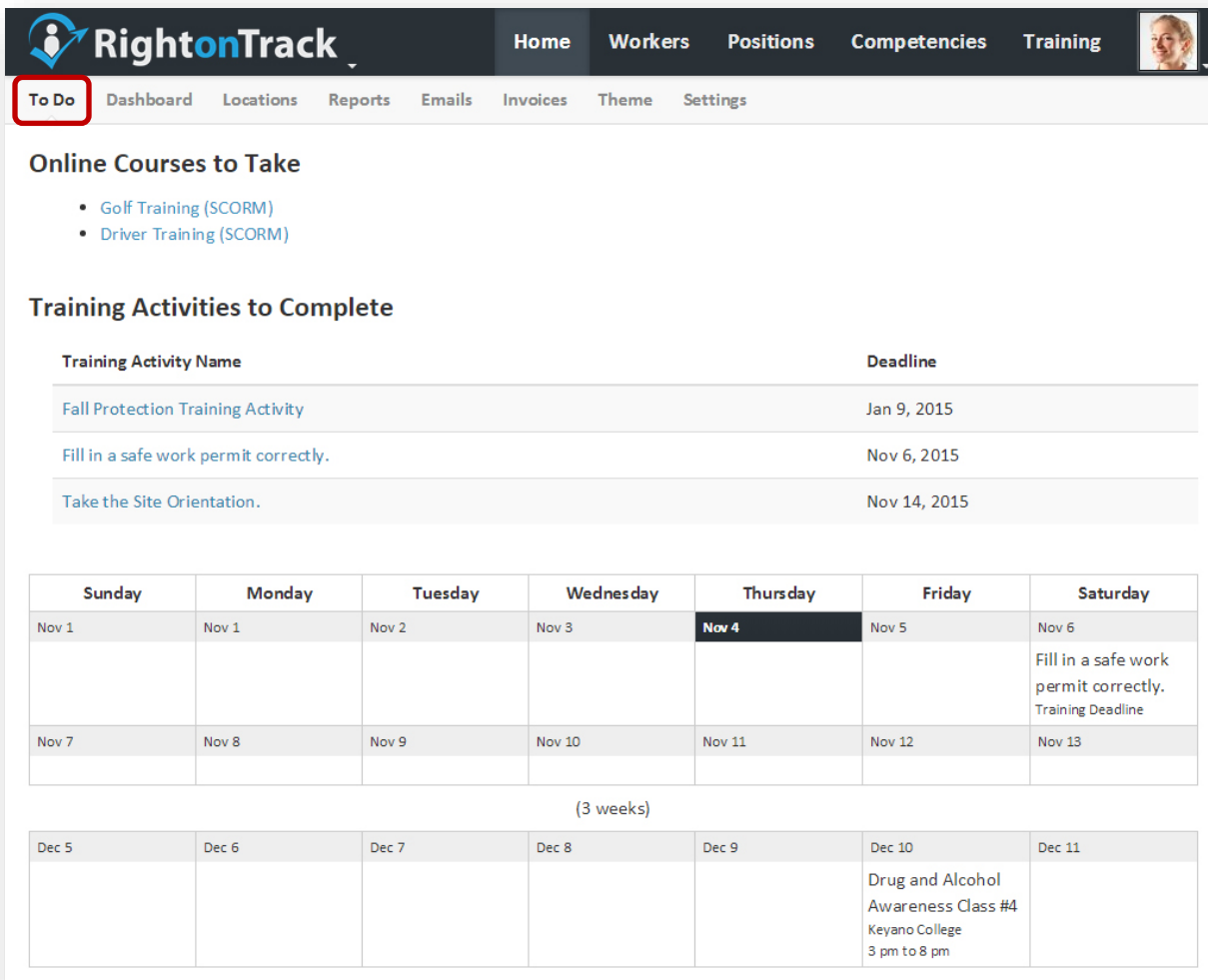
To set the access level for a worker, go to the [worker details page](#).

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.



RightOnTrack

Home Workers Positions Competencies Training

To Do Dashboard Locations Reports Emails Invoices Theme Settings

Online Courses to Take

- Golf Training (SCORM)
- Driver Training (SCORM)

Training Activities to Complete

Training Activity Name	Deadline
Fall Protection Training Activity	Jan 9, 2015
Fill in a safe work permit correctly.	Nov 6, 2015
Take the Site Orientation.	Nov 14, 2015

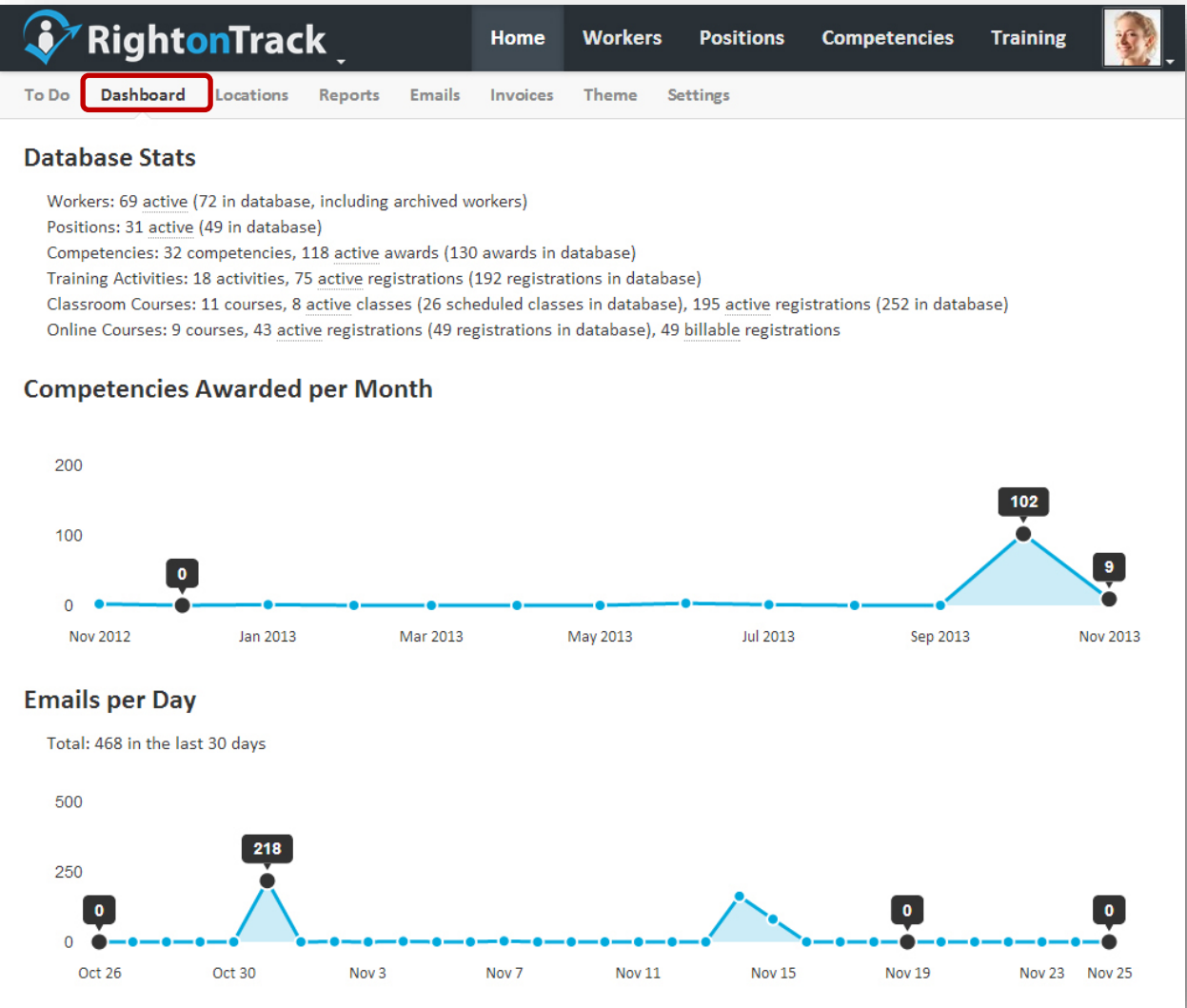
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 1	Nov 1	Nov 2	Nov 3	Nov 4	Nov 5	Nov 6
						Fill in a safe work permit correctly. Training Deadline
Nov 7	Nov 8	Nov 9	Nov 10	Nov 11	Nov 12	Nov 13
(3 weeks)						
Dec 5	Dec 6	Dec 7	Dec 8	Dec 9	Dec 10	Dec 11
					Drug and Alcohol Awareness Class #4 Keyano College 3 pm to 8 pm	

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.

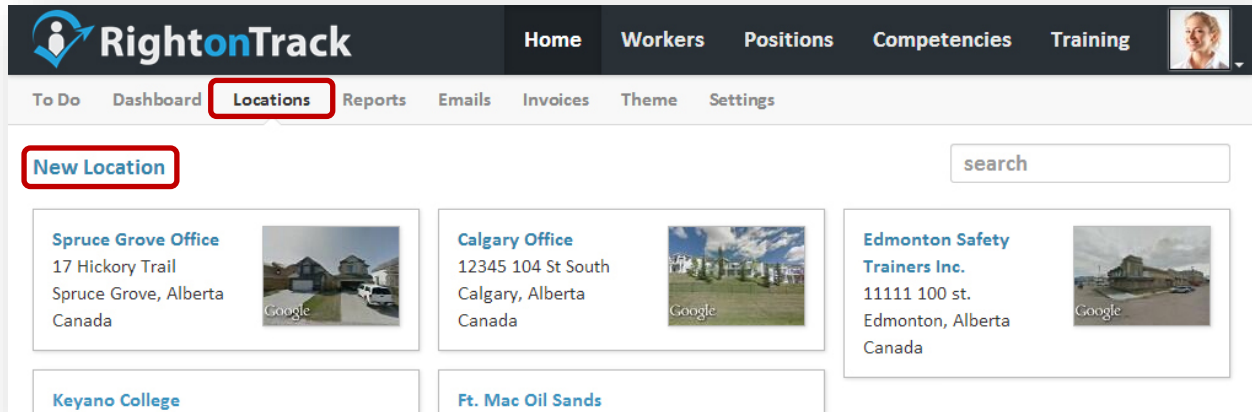
To display the dashboard, click on the **"Home"** tab, then click on the **"Dashboard"** submenu tab.



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.

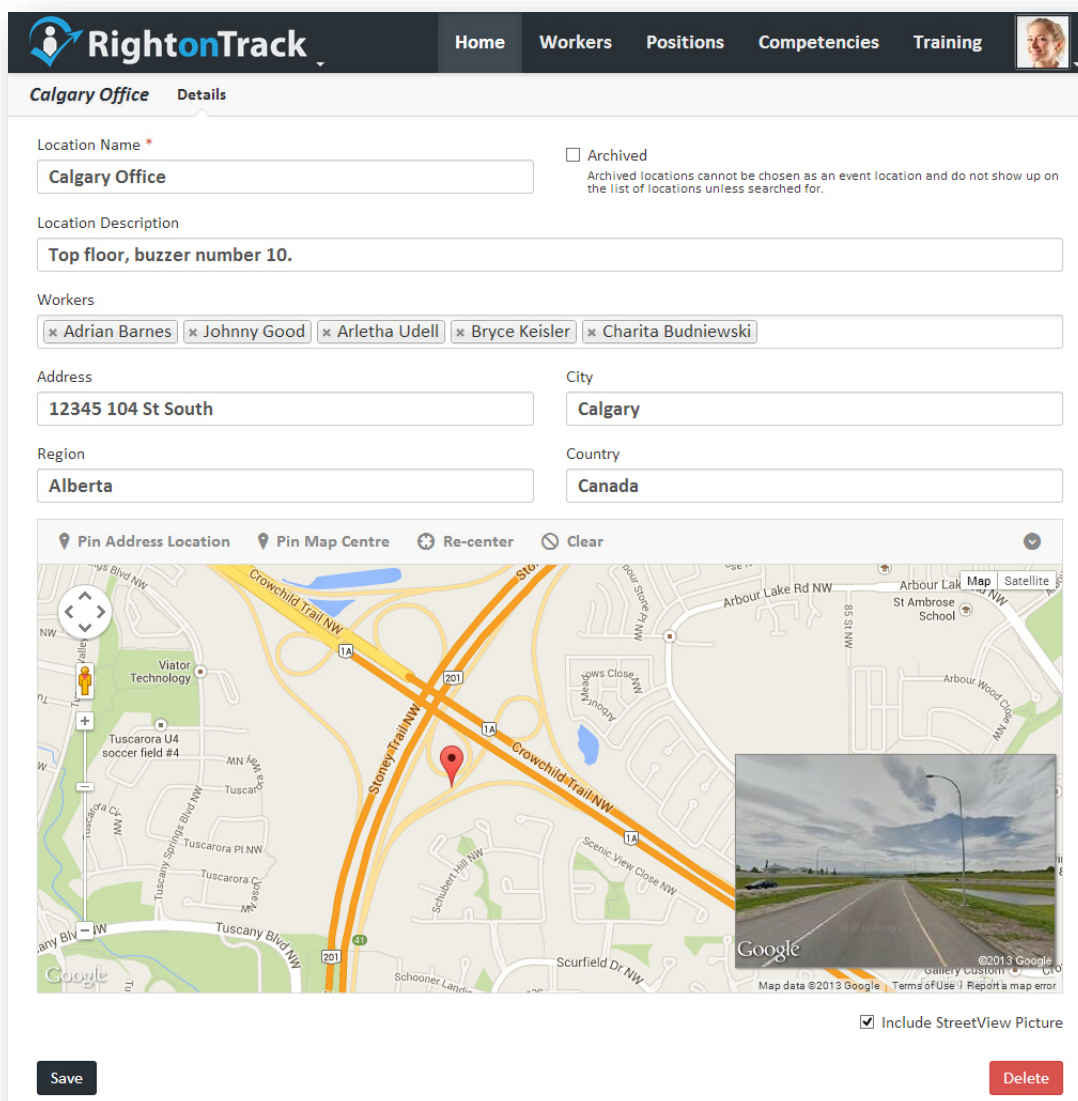
A screenshot of the 'New Location' form in the RightOnTrack application. The form has two main input fields: 'Location Name' and 'Location Description'. The 'Location Name' field contains the text 'Bonnyville Plant'. The 'Location Description' field contains the text 'SAGD Plant. Check in with security at main gate (northeast corner of plant site) upon arrival.' Below these fields is a 'Create' button, which is highlighted with a red box.

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.



The screenshot shows the 'RightOnTrack' web application interface. At the top is a navigation bar with tabs: Home, Workers, Positions, Competencies, and Training. A user profile picture is visible on the right. Below the navigation bar, the page title is 'Calgary Office Details'. The form contains several sections: 'Location Name' with a text input field containing 'Calgary Office' and an 'Archived' checkbox; 'Location Description' with a text input field containing 'Top floor, buzzer number 10.'; 'Workers' with a list of names: Adrian Barnes, Johnny Good, Arletha Udell, Bryce Keisler, and Charita Budniewski, each with an 'X' icon for removal; 'Address' with a text input field containing '12345 104 St South'; 'City' with a dropdown menu showing 'Calgary'; 'Region' with a dropdown menu showing 'Alberta'; and 'Country' with a dropdown menu showing 'Canada'. Below the form is a map section with buttons: 'Pin Address Location', 'Pin Map Centre', 'Re-center', and 'Clear'. The map shows a street view of Calgary with a red pin. A StreetView image is displayed in a small window on the right side of the map. At the bottom of the map section is a checkbox labeled 'Include StreetView Picture' which is checked. At the very bottom of the page are two buttons: 'Save' and 'Delete'.

View All Workers at a Specific Location

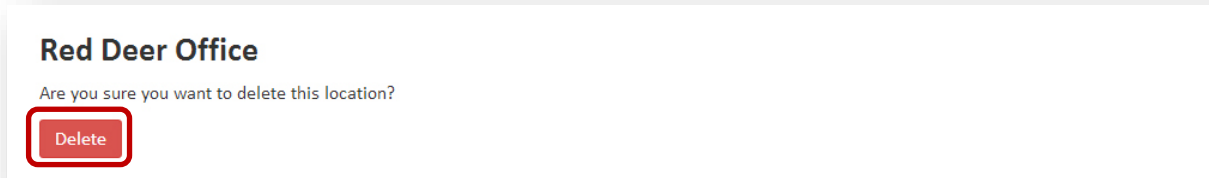
Click on the **"Home"** tab, then click on the **"Locations"** submenu tab. Click on the name of the location to open the location **"Details"** tab. A list of all workers at this location is listed under **"Workers,"** halfway down the page.

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.

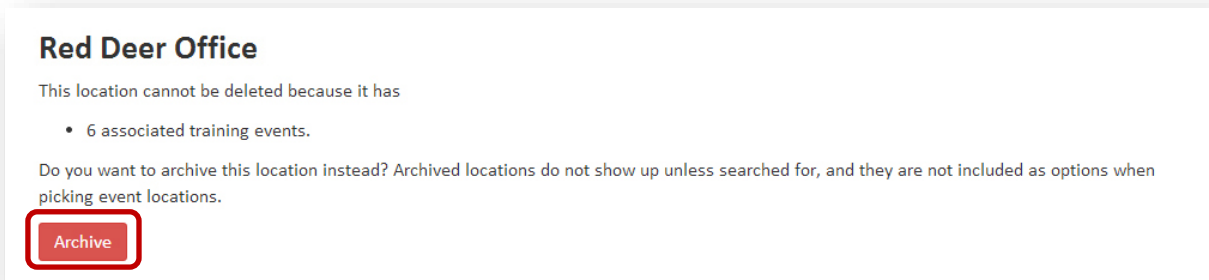


Red Deer Office

Are you sure you want to delete this location?

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.



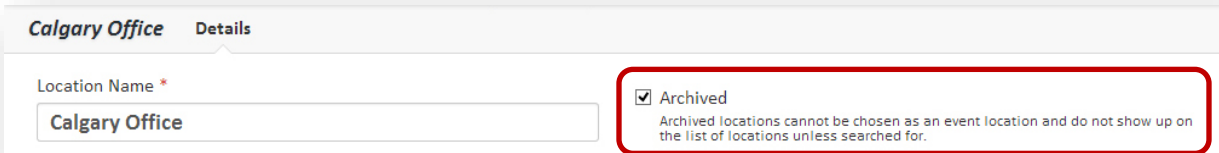
Red Deer Office

This location cannot be deleted because it has

- 6 associated training events.

Do you want to archive this location instead? Archived locations do not show up unless searched for, and they are not included as options when picking event locations.

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



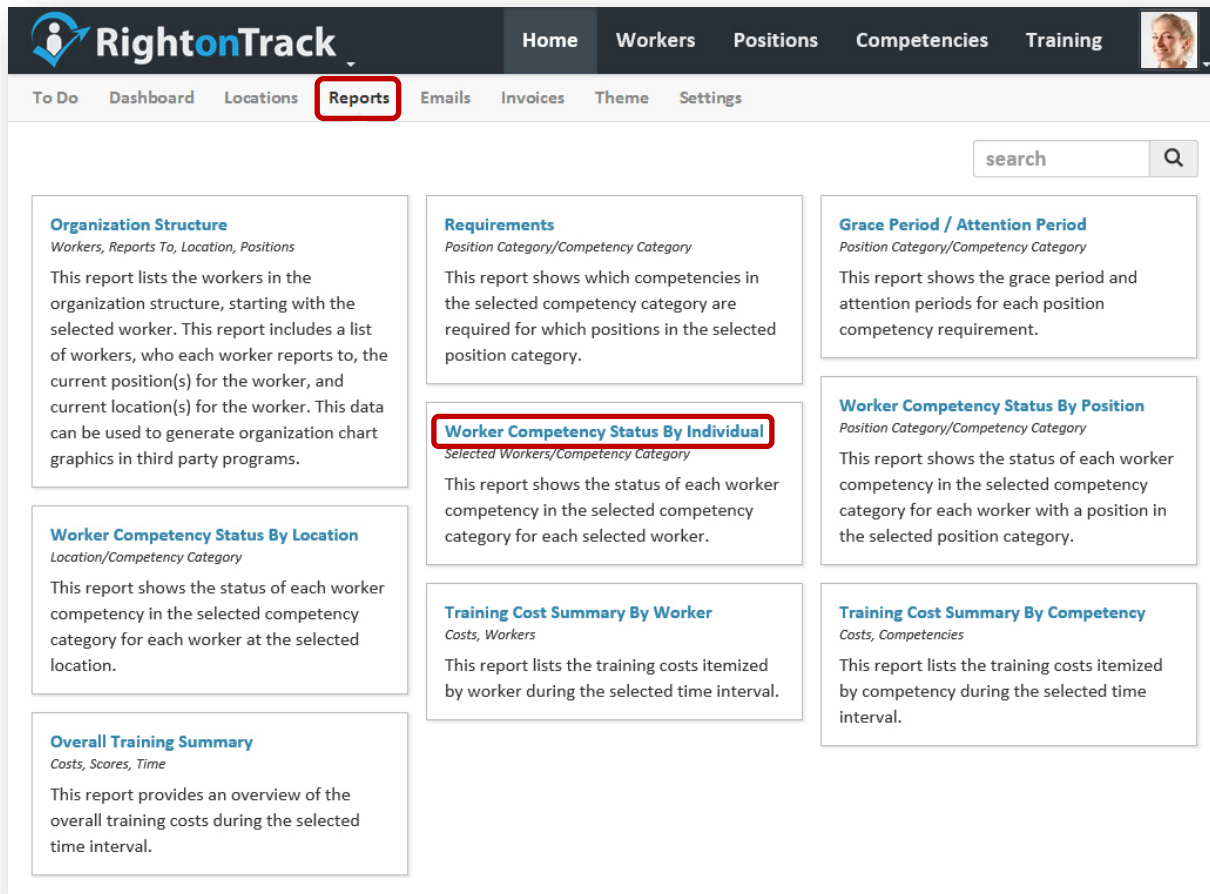
Calgary Office Details

Location Name *

☒ Archived
Archived locations cannot be chosen as an event location and do not show up on the list of locations unless searched for.

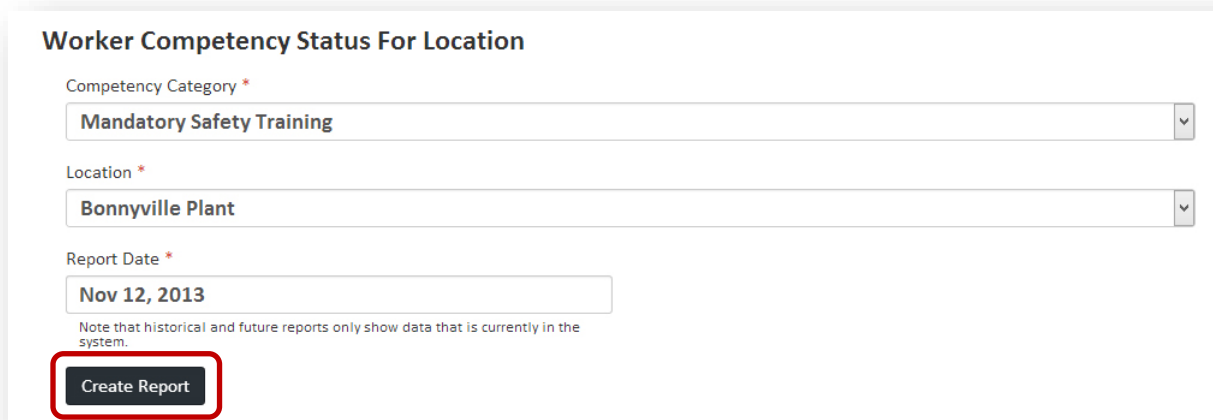
Generate a Training or Cost Report

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.



The screenshot shows the RightOnTrack application interface. The top navigation bar includes "Home", "Workers", "Positions", "Competencies", and "Training". Below this, a secondary menu has "To Do", "Dashboard", "Locations", "Reports" (highlighted with a red box), "Emails", "Invoices", "Theme", and "Settings". A search bar is located on the right. The main content area displays a grid of report options, each with a title, subtitle, and description. The report "Worker Competency Status By Individual" is highlighted with a red box. Other reports include "Organization Structure", "Requirements", "Grace Period / Attention Period", "Worker Competency Status By Location", "Worker Competency Status By Position", "Training Cost Summary By Worker", "Training Cost Summary By Competency", and "Overall Training Summary".

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



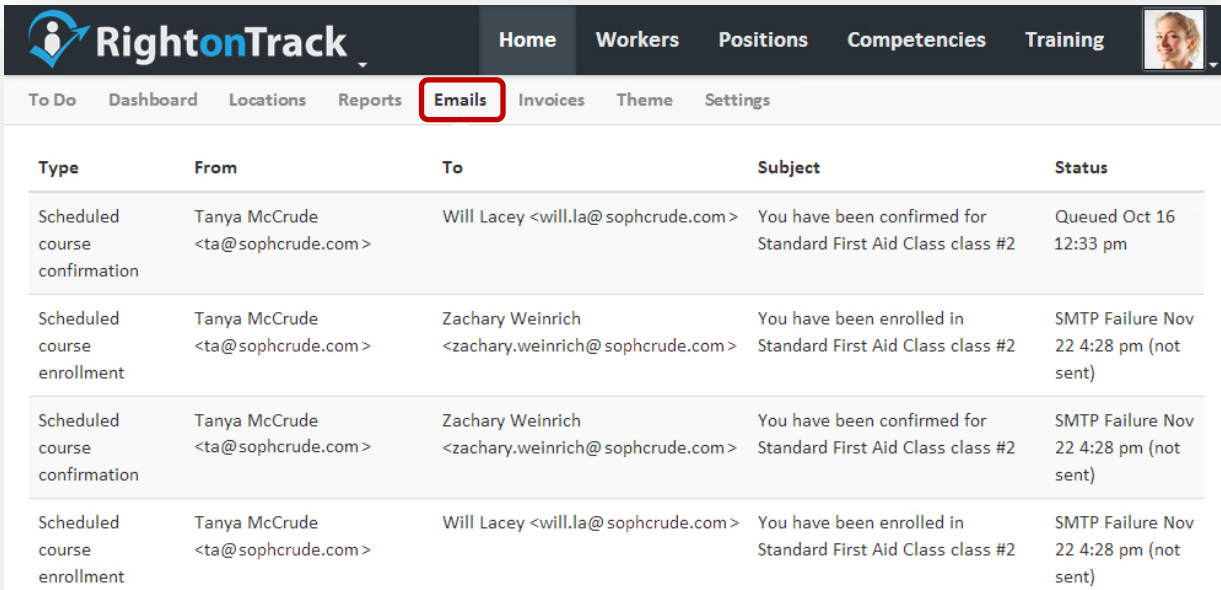
The screenshot shows the "Worker Competency Status For Location" report form. It includes the following fields and controls:

- Competency Category ***: A dropdown menu with "Mandatory Safety Training" selected.
- Location ***: A dropdown menu with "Bonnyville Plant" selected.
- Report Date ***: A date input field showing "Nov 12, 2013".
- Note**: A small text note stating "Note that historical and future reports only show data that is currently in the system."
- Create Report**: A button highlighted with a red box.

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

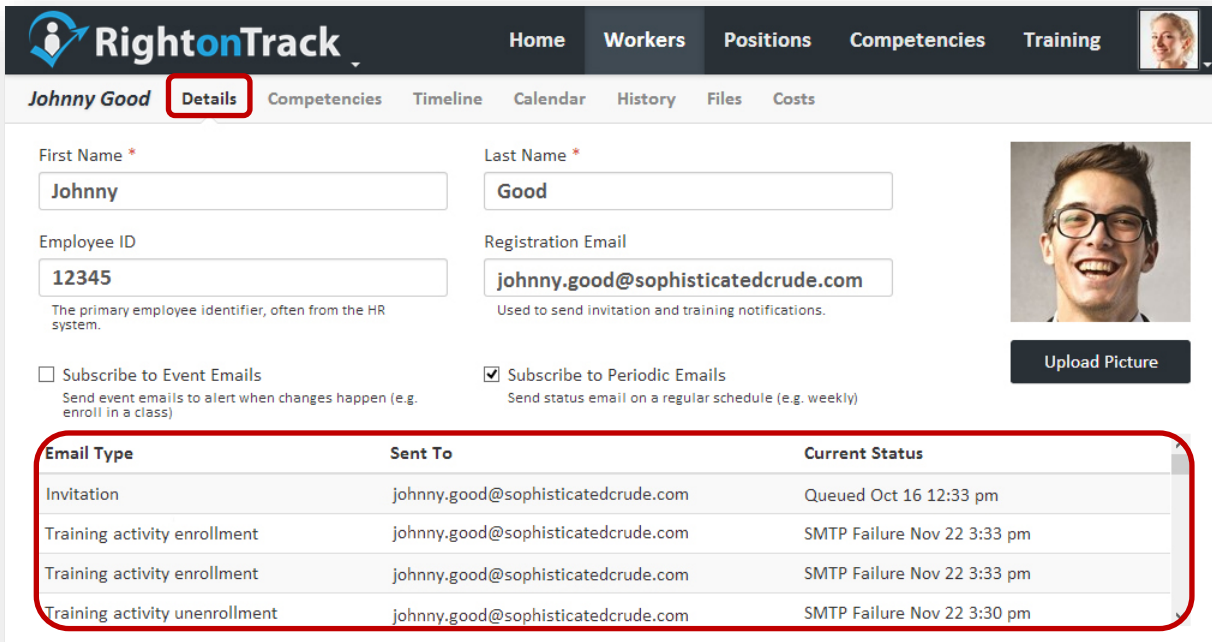
How do I check email delivery status?

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.



Type	From	To	Subject	Status
Scheduled course confirmation	Tanya McCrude <ta@sophcrude.com>	Will Lacey <will.la@sophcrude.com>	You have been confirmed for Standard First Aid Class class #2	Queued Oct 16 12:33 pm
Scheduled course enrollment	Tanya McCrude <ta@sophcrude.com>	Zachary Weinrich <zachary.weinrich@sophcrude.com>	You have been enrolled in Standard First Aid Class class #2	SMTP Failure Nov 22 4:28 pm (not sent)
Scheduled course confirmation	Tanya McCrude <ta@sophcrude.com>	Zachary Weinrich <zachary.weinrich@sophcrude.com>	You have been confirmed for Standard First Aid Class class #2	SMTP Failure Nov 22 4:28 pm (not sent)
Scheduled course enrollment	Tanya McCrude <ta@sophcrude.com>	Will Lacey <will.la@sophcrude.com>	You have been enrolled in Standard First Aid Class class #2	SMTP Failure Nov 22 4:28 pm (not sent)

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.



Email Type	Sent To	Current Status
Invitation	johnny.good@sophisticatedcrude.com	Queued Oct 16 12:33 pm
Training activity enrollment	johnny.good@sophisticatedcrude.com	SMTP Failure Nov 22 3:33 pm
Training activity enrollment	johnny.good@sophisticatedcrude.com	SMTP Failure Nov 22 3:33 pm
Training activity unenrollment	johnny.good@sophisticatedcrude.com	SMTP Failure Nov 22 3:30 pm

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.

RightOnTrack Home Workers Positions Competencies Training

To Do Dashboard Locations Reports Emails **Invoices** Theme Settings

Your Plan

Plan Name	Period Start	Period End	Status	Auto-Renew
\$2/user/month	Nov 9, 12:55 pm	Dec 9, 12:55 pm	active	Yes

[Cancel Subscription](#)

Your Payment Method

Visa number ends in 4242, expires January 2017

This card will be automatically charged on invoice due dates.

[Change Payment Method](#)

Online Training Credits

This account currently has 64 training credits.

[Buy Credits](#)

Upcoming Invoice

Invoice Date	Period Start	Period End	Total	Paid
12/9/2015 8:55:58 PM	Nov 9, 8:55 pm	Dec 9, 8:55 pm	\$203.70	

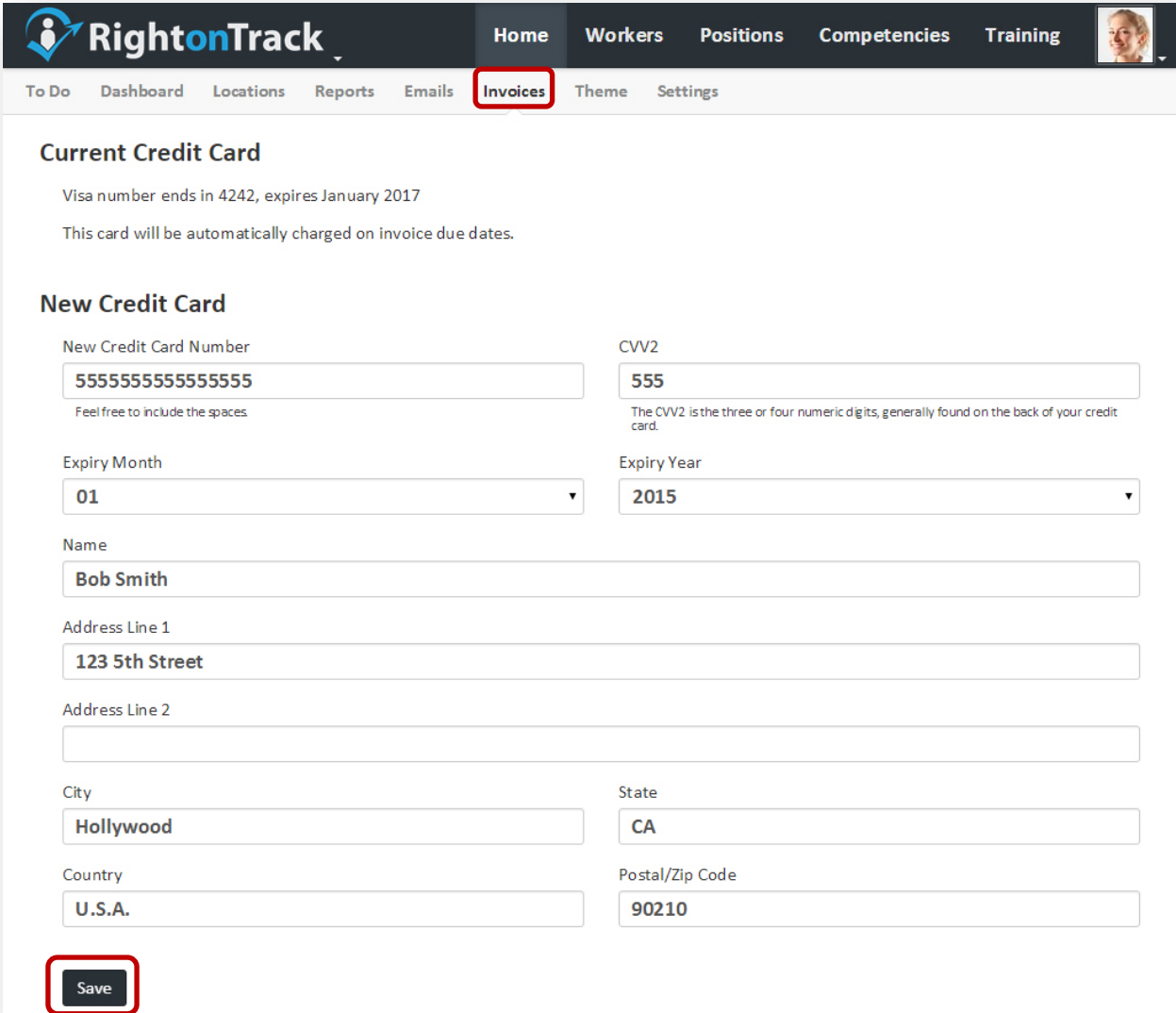
Past Invoices

Invoice Date	Period Start	Period End	Total	Paid
11/12/2015 10:00:21 PM	Nov 9, 8:55 pm	Nov 12, 10 pm	\$3.15	✓
11/12/2015 9:55:15 PM	Nov 9, 8:55 pm	Nov 12, 9:55 pm	\$34.65	✓
11/12/2015 9:51:07 PM	Nov 9, 8:55 pm	Nov 12, 9:51 pm	\$31.50	✓
11/9/2015 8:55:58 PM	Nov 9, 8:55 pm	Nov 9, 8:55 pm	\$140.70	✓

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.



The screenshot shows the RightOnTrack web application interface. The top navigation bar includes the RightOnTrack logo and tabs for Home, Workers, Positions, Competencies, and Training. Below this, a secondary navigation bar contains links for To Do, Dashboard, Locations, Reports, Emails, Invoices (highlighted with a red box), Theme, and Settings. The main content area is titled 'Current Credit Card' and displays information about the current card: 'Visa number ends in 4242, expires January 2017' and 'This card will be automatically charged on invoice due dates.' Below this is the 'New Credit Card' section, which contains a form with the following fields: 'New Credit Card Number' (with value '5555555555555555'), 'CVV2' (with value '555'), 'Expiry Month' (with value '01'), 'Expiry Year' (with value '2015'), 'Name' (with value 'Bob Smith'), 'Address Line 1' (with value '123 5th Street'), 'Address Line 2' (empty), 'City' (with value 'Hollywood'), 'State' (with value 'CA'), 'Country' (with value 'U.S.A.'), and 'Postal/Zip Code' (with value '90210'). A 'Save' button is located at the bottom left of the form, highlighted with a red box.

RightOnTrack

Home Workers Positions Competencies Training

To Do Dashboard Locations Reports Emails **Invoices** Theme Settings

Current Credit Card

Visa number ends in 4242, expires January 2017

This card will be automatically charged on invoice due dates.

New Credit Card

New Credit Card Number
5555555555555555
Feel free to include the spaces

CVV2
555
The CVV2 is the three or four numeric digits, generally found on the back of your credit card.

Expiry Month
01

Expiry Year
2015

Name
Bob Smith

Address Line 1
123 5th Street

Address Line 2

City
Hollywood

State
CA

Country
U.S.A.

Postal/Zip Code
90210

Save

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.

Right on Track

Home Workers Positions Competencies Training

To Do Dashboard Locations Reports Emails **Invoices** Theme Settings

Buy SCORM Credits

SCORM courses are a popular way to package and deliver online training. When a user takes a SCORM course on Right on Track, it consumes a credit. So 50 credits would allow 50 workers to take a SCORM course each, or allow 25 workers to take two SCORM courses each. 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 or if they want to review their answers), no additional credits will be consumed. However, if the worker completes the course and re-enrolls (for instance, after a competency expires), an additional credit will be consumed.

Note: All SCORM credit sales are final and no refunds will be issued. All prices are in US dollars.

Credits	Unit Price
1-250	\$3.00
251-1000	\$2.00
1001+	\$1.00

Credits
1500

Credits	Unit Price	Cost
250	\$3.00	\$750.00
750	\$2.00	\$1500.00
500	\$1.00	\$500.00
		GST \$137.50
		Total \$2887.50

☒ I agree to the terms and conditions.
You can read the terms and conditions related to buying credits [here](#).

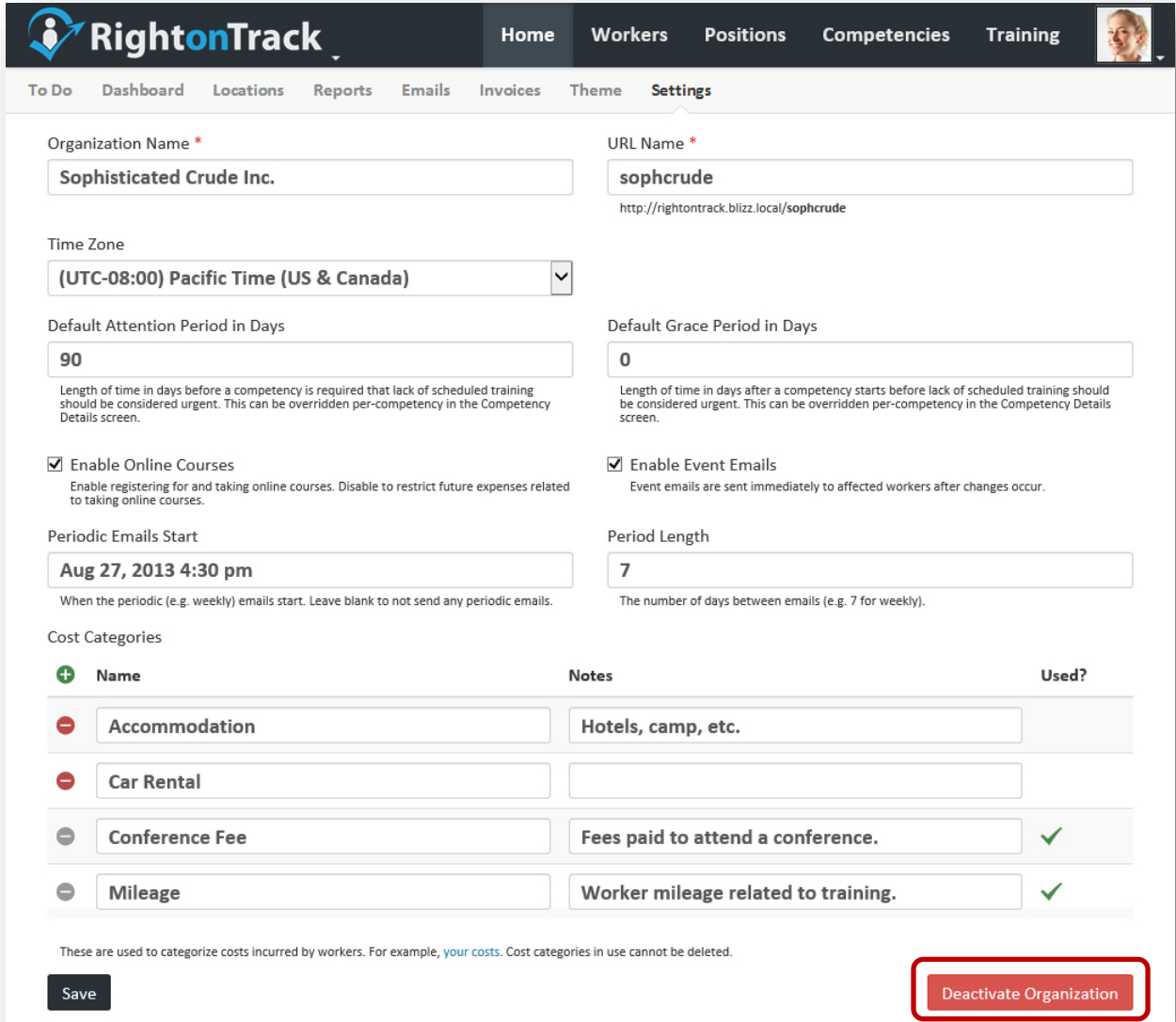
Buy 1500 Credits

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](#)



The screenshot shows the RightOnTrack application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. A secondary navigation bar shows 'To Do', 'Dashboard', 'Locations', 'Reports', 'Emails', 'Invoices', 'Theme', and 'Settings'. The 'Settings' page is displayed, showing various configuration options for the organization 'Sophisticated Crude Inc.'. The 'Deactivate Organization' button is highlighted with a red rectangle in the bottom right corner.

Organization Name *

URL Name *
http://rightontrack.blizz.local/sophcrude

Time Zone

Default Attention Period in Days
Length of time in days before a competency is required that lack of scheduled training should be considered urgent. This can be overridden per-competency in the Competency Details screen.

Default Grace Period in Days
Length of time in days after a competency starts before lack of scheduled training should be considered urgent. This can be overridden per-competency in the Competency Details screen.

☒ Enable Online Courses
Enable registering for and taking online courses. Disable to restrict future expenses related to taking online courses.

☒ Enable Event Emails
Event emails are sent immediately to affected workers after changes occur.

Periodic Emails Start
When the periodic (e.g. weekly) emails start. Leave blank to not send any periodic emails.

Period Length
The number of days between emails (e.g. 7 for weekly).

Cost Categories

+ Name	Notes	Used?
<input type="text" value="Accommodation"/>	<input type="text" value="Hotels, camp, etc."/>	
<input type="text" value="Car Rental"/>	<input type="text"/>	
<input type="text" value="Conference Fee"/>	<input type="text" value="Fees paid to attend a conference."/>	✓
<input type="text" value="Mileage"/>	<input type="text" value="Worker mileage related to training."/>	✓

These are used to categorize costs incurred by workers. For example, [your costs](#). Cost categories in use cannot be deleted.



Edit Organization Settings and Cost Categories

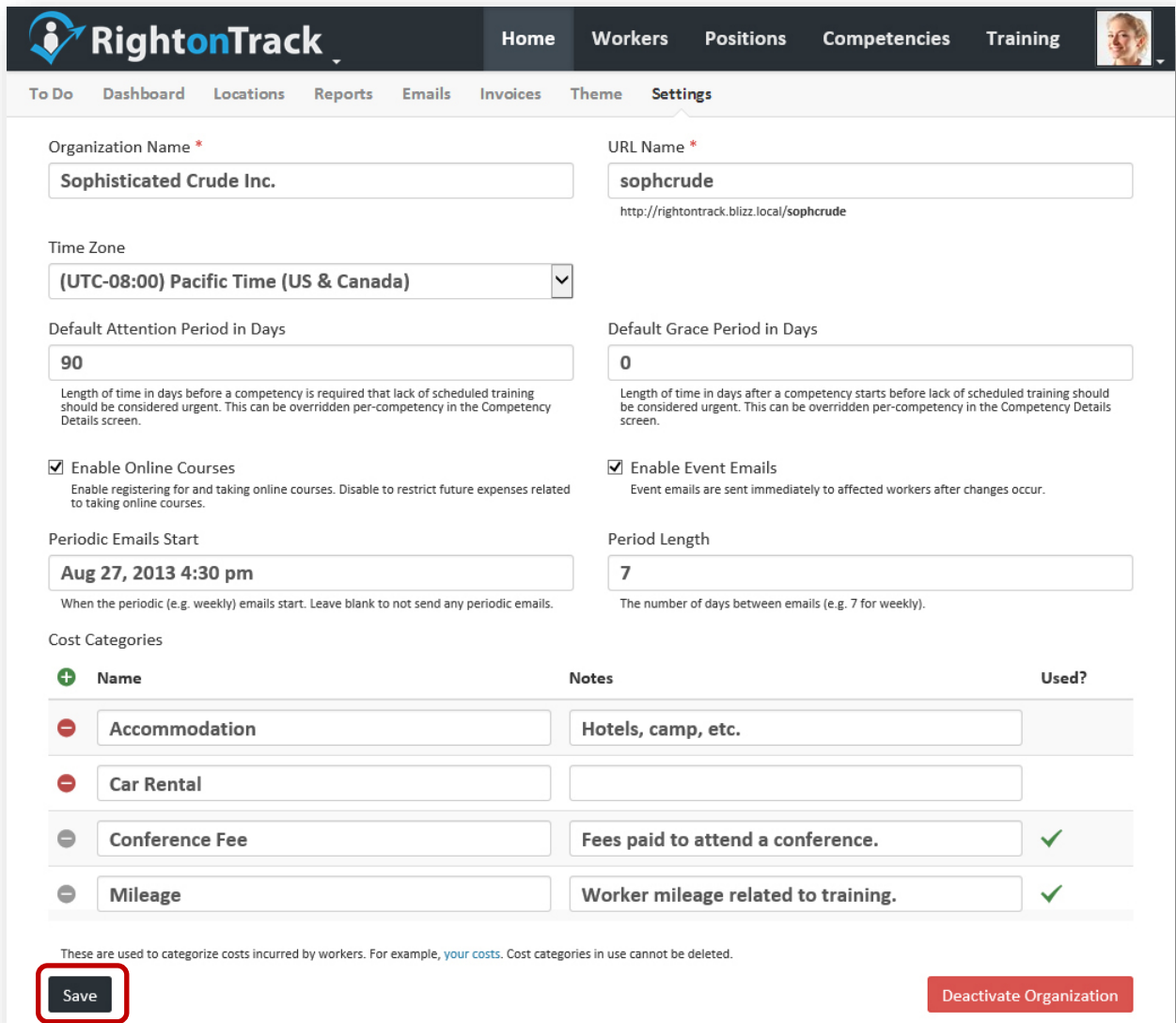
Click on the **"Home"** tab, then click on the **"Settings"** submenu tab.

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.







The screenshot shows the 'Settings' page in the RightOnTrack application. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Settings' submenu is active. The page is divided into two main sections: Organization Settings and Cost Categories.

Organization Settings:

- Organization Name:** Sophisticated Crude Inc.
- URL Name:** sophcrude (URL: http://rightontrack.blizz.local/sophcrude)
- Time Zone:** (UTC-08:00) Pacific Time (US & Canada)
- Default Attention Period in Days:** 90 (Note: Length of time in days before a competency is required that lack of scheduled training should be considered urgent. This can be overridden per-competency in the Competency Details screen.)
- Default Grace Period in Days:** 0 (Note: Length of time in days after a competency starts before lack of scheduled training should be considered urgent. This can be overridden per-competency in the Competency Details screen.)
- ☒ **Enable Online Courses** (Note: Enable registering for and taking online courses. Disable to restrict future expenses related to taking online courses.)
- ☒ **Enable Event Emails** (Note: Event emails are sent immediately to affected workers after changes occur.)
- Periodic Emails Start:** Aug 27, 2013 4:30 pm (Note: When the periodic (e.g. weekly) emails start. Leave blank to not send any periodic emails.)
- Period Length:** 7 (Note: The number of days between emails (e.g. 7 for weekly).)

Cost Categories:

	Name	Notes	Used?
	Accommodation	Hotels, camp, etc.	
	Car Rental		
	Conference Fee	Fees paid to attend a conference.	✓
	Mileage	Worker mileage related to training.	✓

These are used to categorize costs incurred by workers. For example, [your costs](#). Cost categories in use cannot be deleted.

Save (highlighted with a red box) **Deactivate Organization**

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.

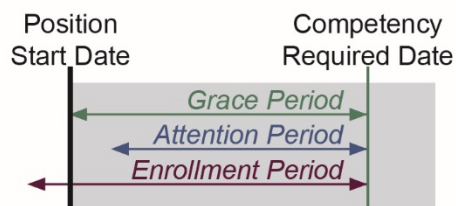
What is the Attention Period for a competency?

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).

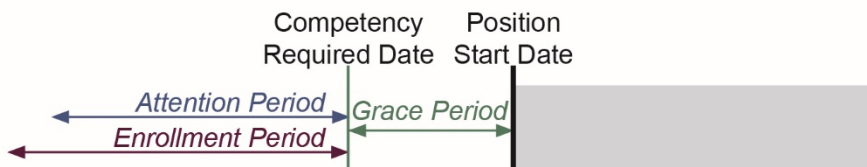
When the attention period starts, the competency will be colored “orange” (attention required) in reports and on the worker’s competency screen. At this point, the competency will be included in notification emails to the worker and to the supervisor. The attention period has no effect on the worker’s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

Grace Period and Attention Period Diagrams

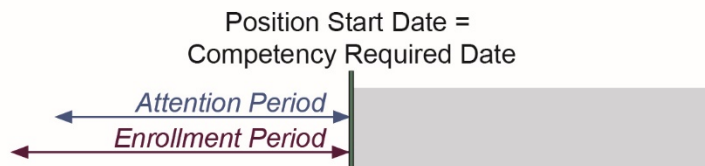
The competency is required after the position starts (**Grace Period is Positive**):



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).

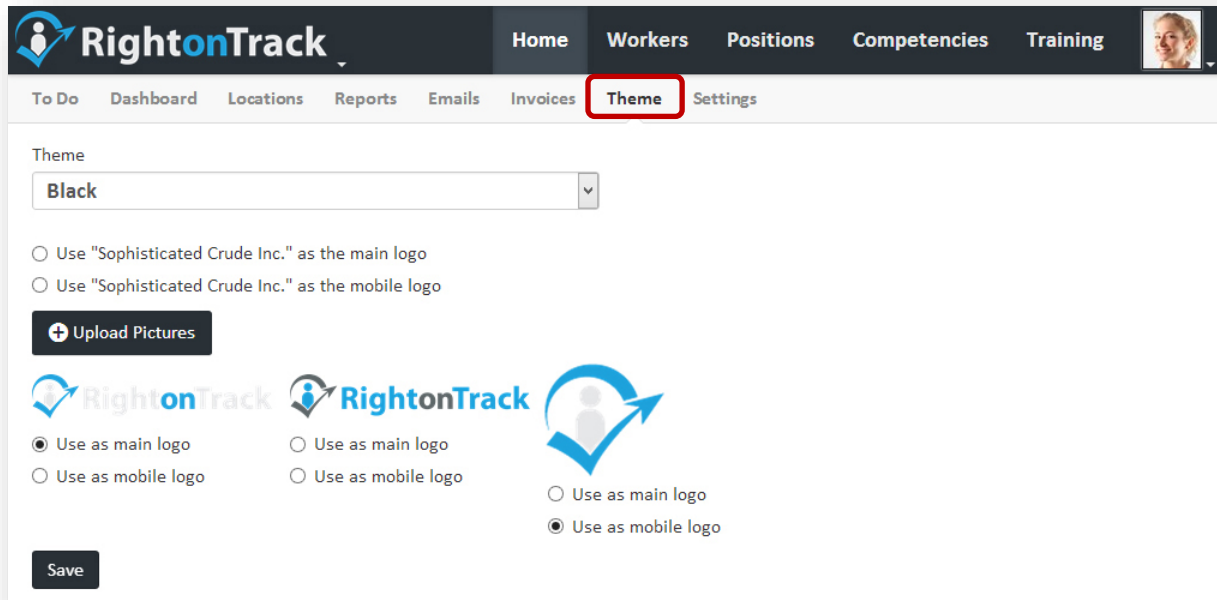
Customize the Theme and Logo

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.

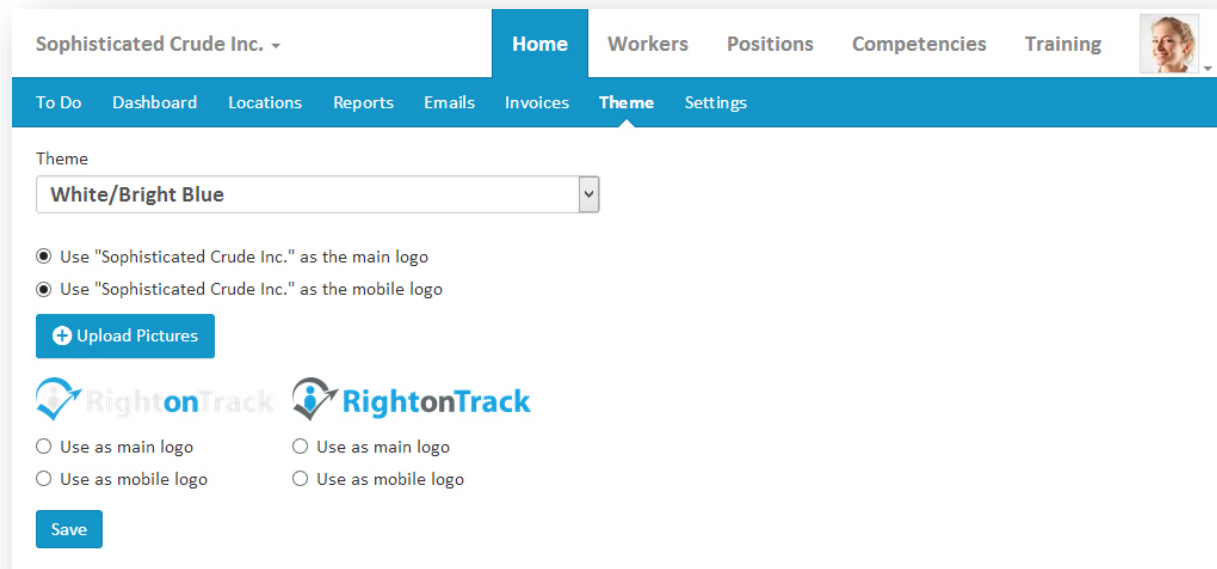
Note: Logos must be in Portable Network Graphics (.png) format.

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



The screenshot shows the RightOnTrack application interface. The top navigation bar includes tabs for Home, Workers, Positions, Competencies, and Training. Below this is a secondary navigation bar with links for To Do, Dashboard, Locations, Reports, Emails, Invoices, Theme (highlighted with a red box), and Settings. The main content area is titled 'Theme' and features a dropdown menu set to 'Black'. Below the dropdown are two radio button options: 'Use "Sophisticated Crude Inc." as the main logo' and 'Use "Sophisticated Crude Inc." as the mobile logo'. A 'Upload Pictures' button is also present. Three logo examples are shown: the first is the RightOnTrack logo with 'Use as main logo' selected; the second is the RightOnTrack logo with 'Use as mobile logo' selected; and the third is a stylized person icon with 'Use as mobile logo' selected. A 'Save' button is at the bottom left.

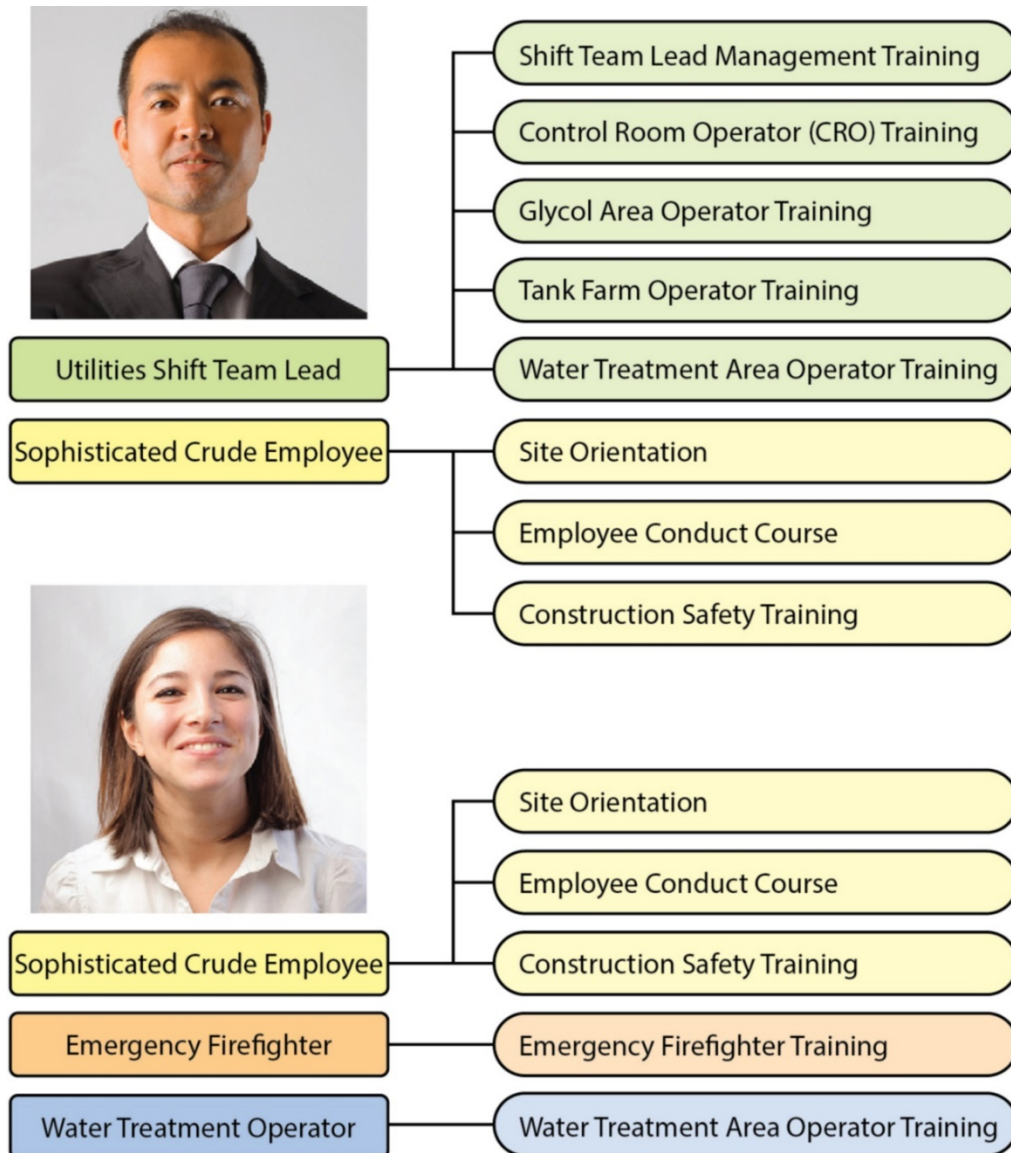
In the example below, the organization name is used instead of a logo, and the white/blue color theme is shown.



The screenshot shows the RightOnTrack application interface. The top navigation bar includes tabs for Home, Workers, Positions, Competencies, and Training. Below this is a secondary navigation bar with links for To Do, Dashboard, Locations, Reports, Emails, Invoices, Theme (highlighted with a blue box), and Settings. The main content area is titled 'Theme' and features a dropdown menu set to 'White/Bright Blue'. Below the dropdown are two radio button options: 'Use "Sophisticated Crude Inc." as the main logo' and 'Use "Sophisticated Crude Inc." as the mobile logo'. A 'Upload Pictures' button is also present. Two logo examples are shown: the first is the RightOnTrack logo with 'Use as main logo' selected; the second is the RightOnTrack logo with 'Use as mobile logo' selected. A 'Save' button is at the bottom left.

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.

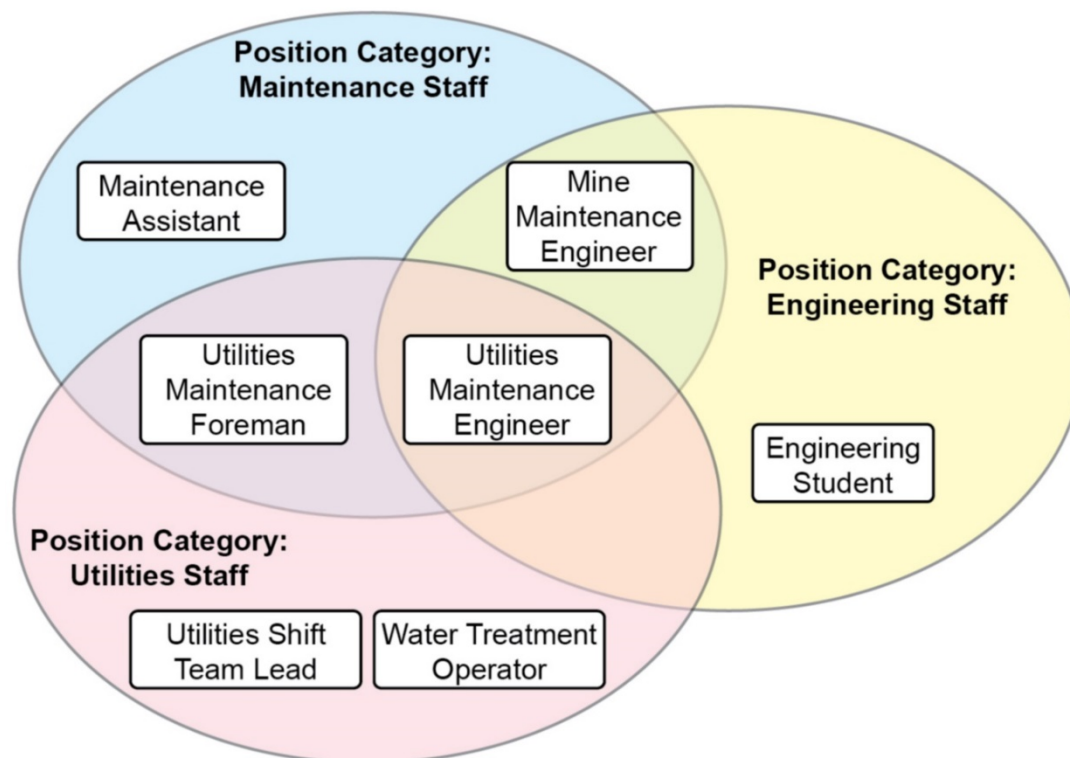
As the start date of the each promotion approaches, the competencies which are required for the new position will increase in urgency, and the competencies which are no longer required will disappear from the worker competency page.

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	<ul style="list-style-type: none"> -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. 	<ul style="list-style-type: none"> -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	<ul style="list-style-type: none"> -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. 	<ul style="list-style-type: none"> -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	<ul style="list-style-type: none"> -This training activity has any worker enrollments. 	<ul style="list-style-type: none"> -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.

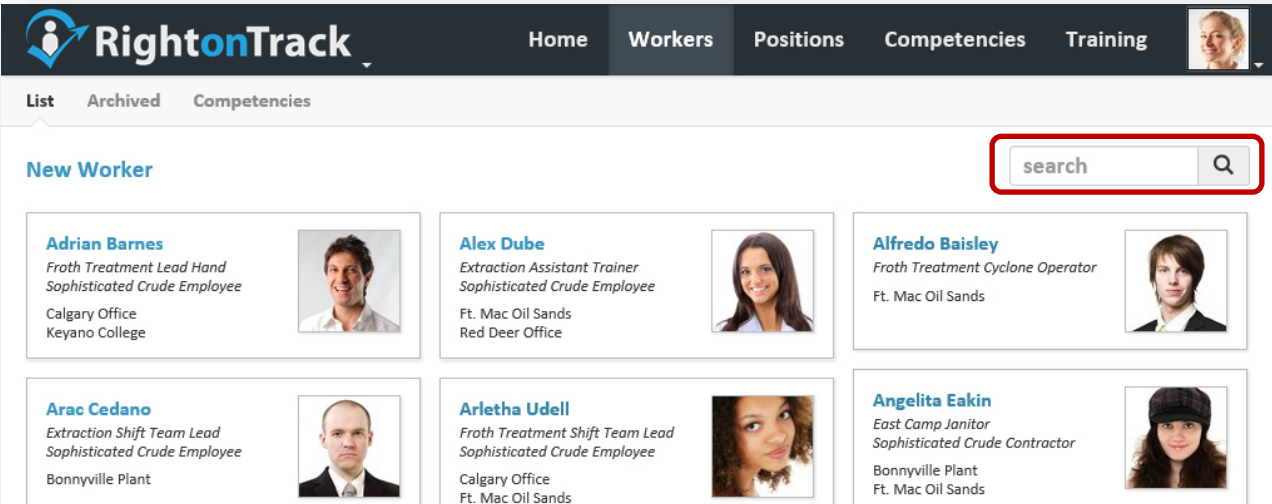
Note: When a worker does not have any current or future positions during the month, the worker is not included in the total count for billing purposes.

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.



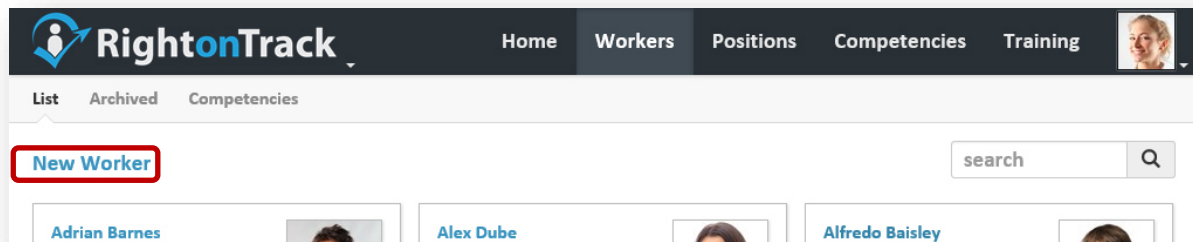
The screenshot shows the 'RightOnTrack' application interface. At the top, there is a navigation bar with tabs: Home, Workers, Positions, Competencies, and Training. The 'Workers' tab is selected. Below the navigation bar, there is a sub-menu with 'List', 'Archived', and 'Competencies'. The 'List' tab is active. On the right side of the sub-menu, there is a search bar with the text 'search' and a magnifying glass icon, which is highlighted with a red rectangle. Below the search bar, there is a section titled 'New Worker' containing a grid of worker profiles. Each profile includes a name, a title, a description, and a photo.

Name	Title	Description	Photo
Adrian Barnes	Froth Treatment Lead Hand	Sophisticated Crude Employee Calgary Office Keyano College	
Alex Dube	Extraction Assistant Trainer	Sophisticated Crude Employee Ft. Mac Oil Sands Red Deer Office	
Alfredo Baisley	Froth Treatment Cyclone Operator	Ft. Mac Oil Sands	
Arac Cedano	Extraction Shift Team Lead	Sophisticated Crude Employee Bonnyville Plant	
Arletha Udell	Froth Treatment Shift Team Lead	Sophisticated Crude Employee Calgary Office Ft. Mac Oil Sands	
Angelita Eakin	East Camp Janitor	Sophisticated Crude Contractor Bonnyville Plant Ft. Mac Oil Sands	

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).

New Worker

First Name * Last Name *

Title

Employee ID Registration Email

The primary employee identifier, often from the HR system. Used to send invitation and training notifications. This is not required; you can have workers in the system just for tracking purposes.

☒ Subscribe to Event Emails Send event emails to alert when changes happen (e.g. enroll in a class). ☒ Subscribe to Periodic Emails Send status email on a regular schedule (e.g. weekly).

Reports To

Locations

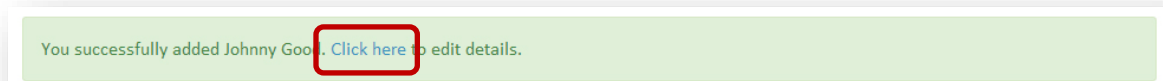
Positions

You can choose existing positions or create new ones here by just typing them in (with a comma to accept the current one and start the next one). When the worker is created, those positions will be created as well.

Create

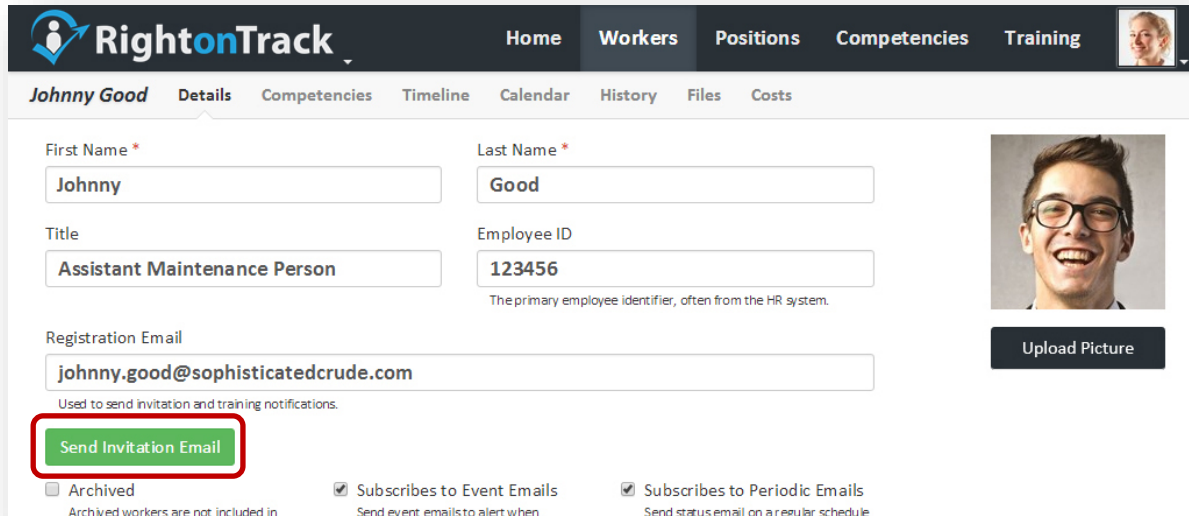
In the positions box, type in the name of one or more positions for this worker. As you type, you may select an existing position from the list displayed. To add new positions for this worker, type the names of the positions, separated by commas.

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

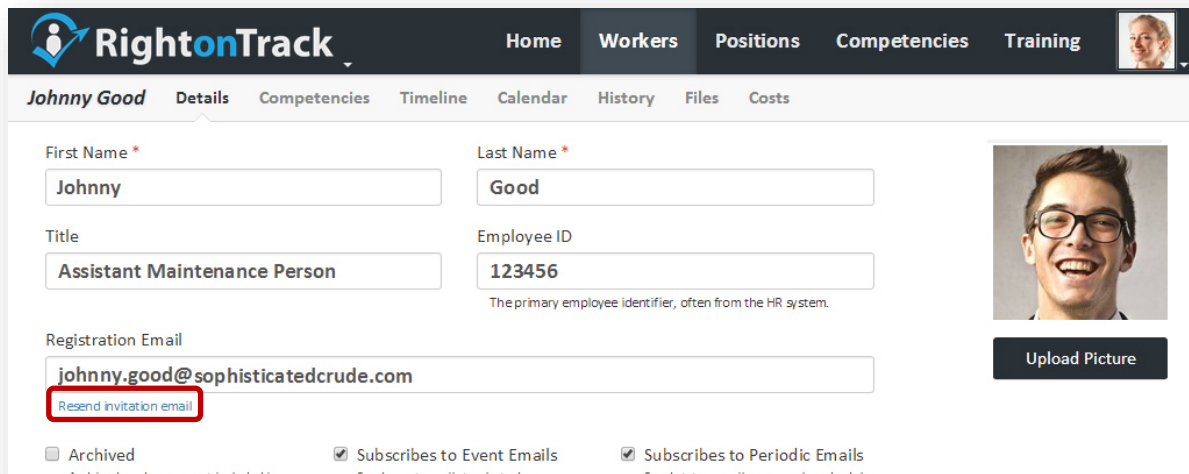
Find the worker, then click on the **"Details"** tab for the worker. Click on the **"Send Invitation Email"** button to send the invitation email to the user.



The screenshot shows the 'Details' tab for a worker named Johnny Good. The form contains the following fields and options:

- First Name ***: Johnny
- Last Name ***: Good
- Title**: Assistant Maintenance Person
- Employee ID**: 123456 (Note: The primary employee identifier, often from the HR system.)
- Registration Email**: johnny.good@sophisticatedcrude.com (Note: Used to send invitation and training notifications.)
- Send Invitation Email**: A green button, highlighted with a red box.
- Archived**: ☐ Archived (Archived workers are not included in...)
- Subscribes to Event Emails**: ☒ Subscribes to Event Emails (Send event emails to alert when...)
- Subscribes to Periodic Emails**: ☒ Subscribes to Periodic Emails (Send status email on a regular schedule...)

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



The screenshot shows the 'Details' tab for a worker named Johnny Good. The form contains the following fields and options:

- First Name ***: Johnny
- Last Name ***: Good
- Title**: Assistant Maintenance Person
- Employee ID**: 123456 (Note: The primary employee identifier, often from the HR system.)
- Registration Email**: johnny.good@sophisticatedcrude.com
- Resend invitation email**: A link, highlighted with a red box.
- Archived**: ☐ Archived (Archived workers are not included in...)
- Subscribes to Event Emails**: ☒ Subscribes to Event Emails (Send event emails to alert when...)
- Subscribes to Periodic Emails**: ☒ Subscribes to Periodic Emails (Send status email on a regular schedule...)

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.

RightOnTrack Home Workers Positions Competencies Training

Johnny Good **Details** Competencies Timeline Calendar History Files Costs

First Name * Johnny Last Name * Good

Title Maintenance Assistant Employee ID 12345
The primary employee identifier, often from the HR system.

Registration Email johnny.good@sophisticatedcrude.com
[Resend invitation email](#)

☐ Archived Archived workers are not included in menus and do not show up in the list of workers. ☐ Subscribes to Event Emails Send event emails to alert when changes happen (e.g. enroll in a class). ☒ Subscribes to Periodic Emails Send status email on a regular schedule (e.g. weekly).

Email Type	Sent To	Current Status
Invitation	johnny.good@sophisticatedcrude.com	Queued Oct 16 12:33 pm

Reports To Adrian Barnes Access Level Employee

Locations

Exempted Competencies

Past (1) Present (2) Future

Position	Start Date	End Date
<input type="text" value="Extraction Sampler"/>	<input type="text" value="Jun 1, 2015"/>	<input type="text"/>
<input type="text" value="Bitumen Processing Engineering Student"/>	<input type="text" value="Oct 25, 2014"/>	<input type="text"/>

Save **Delete**

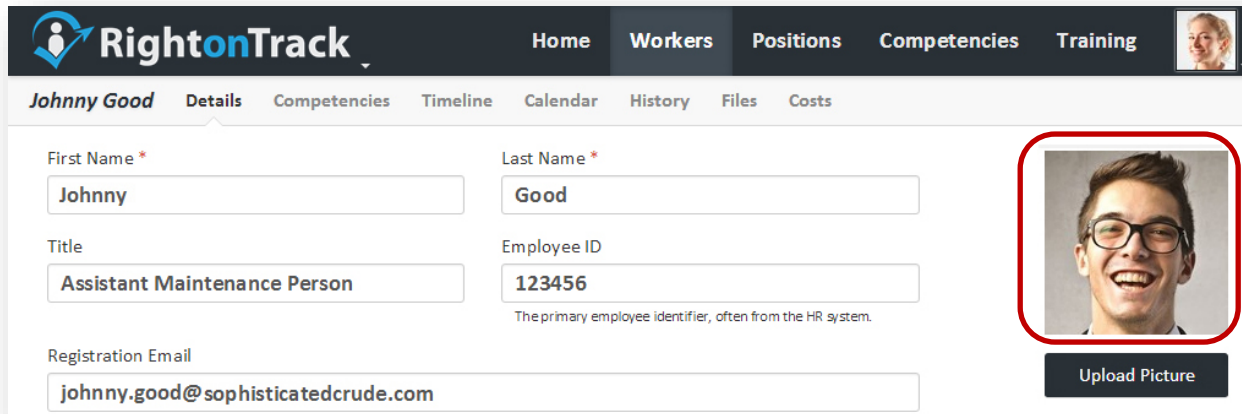
Notes:

- **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.




RightOnTrack Home Workers Positions Competencies Training

Johnny Good Details Competencies Timeline Calendar History Files Costs

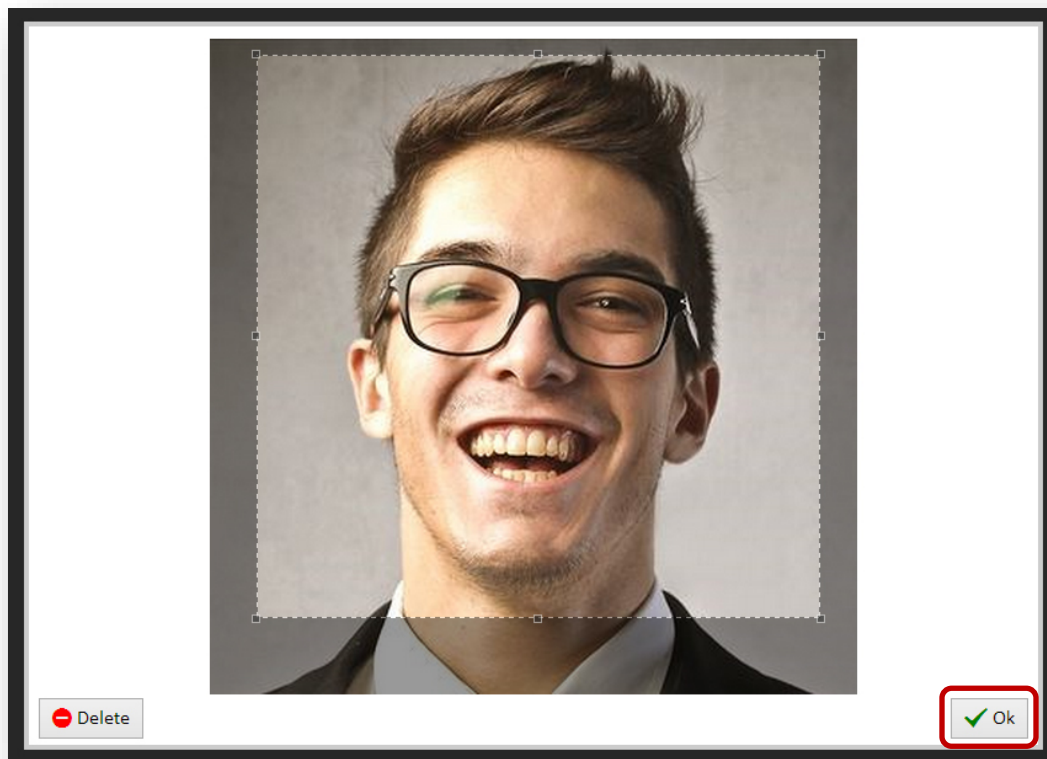
First Name * Last Name *

Title Employee ID
The primary employee identifier, often from the HR system.

Registration Email

 **Upload Picture**

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.

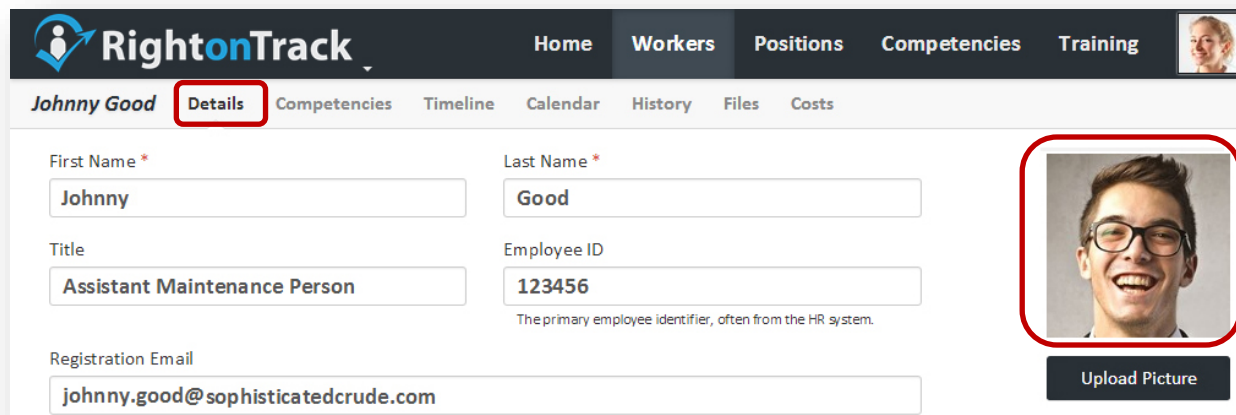


Worker Picture File Requirements

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.



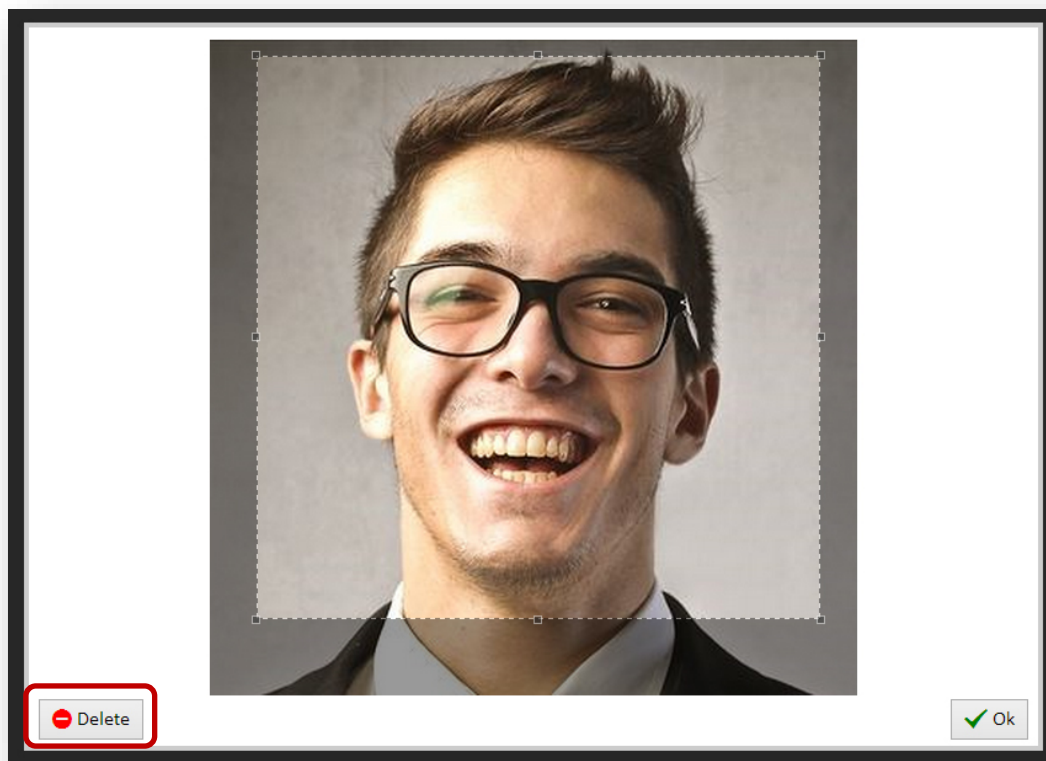
RightOnTrack Home Workers Positions Competencies Training

Johnny Good **Details** Competencies Timeline Calendar History Files Costs



First Name * Johnny
Last Name * Good
Title Assistant Maintenance Person
Employee ID 123456
Registration Email johnny.good@sophisticatedcrude.com

Upload Picture

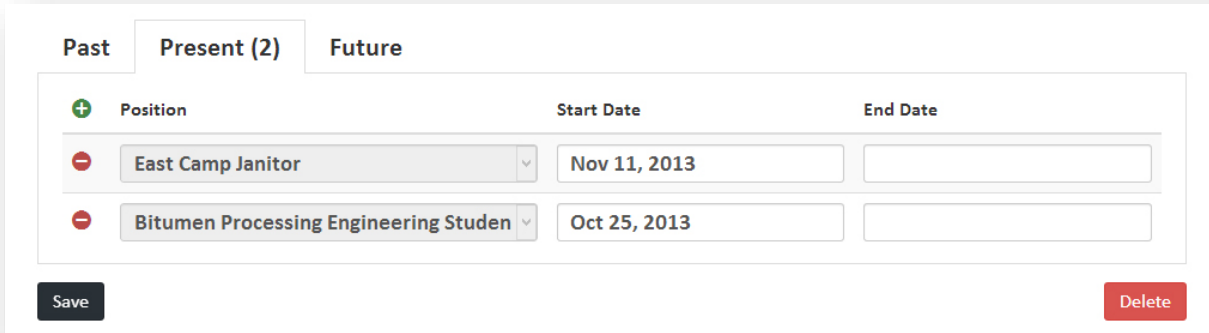
Press the **"Delete"** button in the lower left hand corner.





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.



	Position	Start Date	End Date
	East Camp Janitor	Nov 11, 2013	
	Bitumen Processing Engineering Studen	Oct 25, 2013	

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.

RightOnTrack Home Workers Positions Competencies Training

Johnny Good Details Competencies Timeline Calendar History Files Costs

First Name * Last Name *

Title Employee ID
The primary employee identifier, often from the HR system.

Registration Email
[Resend invitation email](#)

☐ Archived Archived workers are not included in menus and do not show up in the list of workers. ☐ Subscribes to Event Emails Send event emails to alert when changes happen (e.g. enroll in a class). ☒ Subscribes to Periodic Emails Send status email on a regular schedule (e.g. weekly).

Email Type	Sent To	Current Status
Invitation	johnny.good@sophisticatedcrude.com	Queued Oct 16 12:33 pm

Reports To Access Level

Locations

Past (1) Present (2) Future

Position	Start Date	End Date
<input type="text" value="Extraction Sampler"/>	<input type="text" value="Jun 1, 2015"/>	<input type="text"/>
<input type="text" value="Bitumen Processing Engineering Student"/>	<input type="text" value="Oct 25, 2014"/>	<input type="text"/>

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

Joe Smith

Are you sure you want to delete this worker?

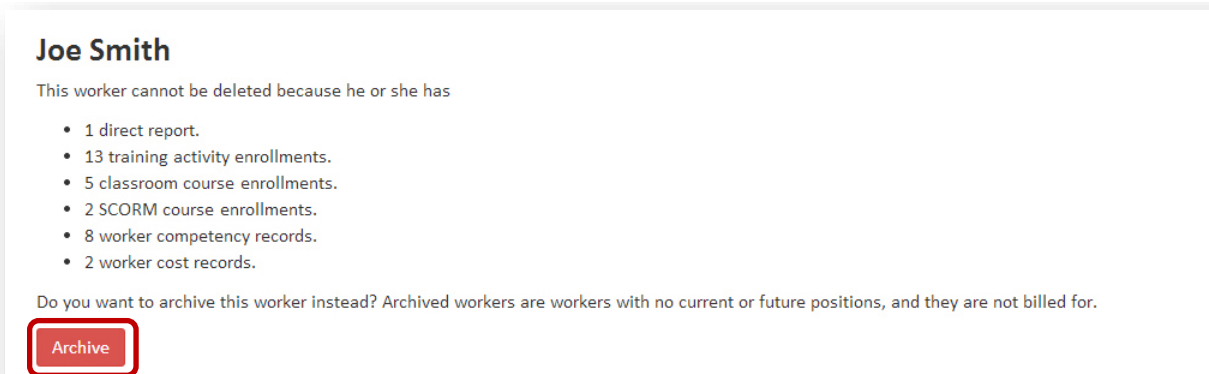
Continued on next page....

Continued on next page....

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.

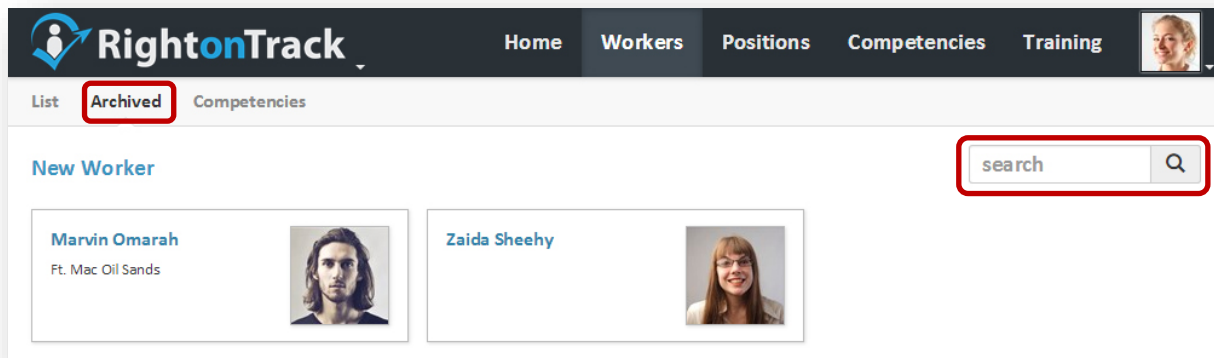


The screenshot shows a user interface for a worker named Joe Smith. At the top, the name "Joe Smith" is displayed in bold. Below it, a message states: "This worker cannot be deleted because he or she has". This is followed by a bulleted list of reasons: "1 direct report.", "13 training activity enrollments.", "5 classroom course enrollments.", "2 SCORM course enrollments.", "8 worker competency records.", and "2 worker cost records.". Below the list, a question asks: "Do you want to archive this worker instead? Archived workers are workers with no current or future positions, and they are not billed for." At the bottom left of the dialog, there is a red button labeled "Archive".

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.

This screenshot shows the 'Details' page for Marvin Omarah. The top navigation bar is the same as the previous image. Below it, a sub-menu for Marvin Omarah includes 'Details' (highlighted with a red box), 'Competencies', 'Timeline', 'Calendar', 'History', 'Files', and 'Costs'. The form contains fields for 'First Name' (Marvin), 'Last Name' (Omarah), 'Title', 'Employee ID', and 'Registration Email' (marvin.omarah@netris.net). To the right is a profile picture and an 'Upload Picture' button. At the bottom, there are three checkboxes: 'Archived' (checked and highlighted with a red box), 'Subscribes to Event Emails', and 'Subscribes to Periodic Emails'. Small text explains that archived workers are not included in menus and that event emails alert for changes while periodic emails are on a schedule.

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.

The screenshot displays the RightOnTrack software interface. The top navigation bar includes links for Home, Workers, Positions, Competencies, and Training. The main header shows the user's name, Tanya McCrude, and the selected tab, Competencies. Below the header, there are filters for 'Expand All', 'Collapse All', 'Expand Worker', and a search bar. The left panel shows a vertical organization chart with workers listed under their supervisors. The center panel shows the competencies for Alex Dube, with a list of competencies and their status (Active, Attention Needed, etc.). The right panel shows a timeline of competency status from 2014 to 2016. The bottom panel contains a legend explaining the color coding for competency status and enrollment.

RightOnTrack Home Workers Positions Competencies Training

Tanya McCrude Details **Competencies** Timeline Calendar History Files Costs

Expand All · Collapse All · Expand Worker

search workers

Competencies For: Alex Dube [5]

Competency Categories: All [5]

2014 2015 2016

Extraction Shift Team Lead · Aug 1 -

- Confined Space Entry
- Lockout and Tagout (LOTO)
- Pumps: Course 1
- First Aid
- Fit Test
- Fall Protection
- Fire Extinguisher Training
- SCBA

Sophisticated Crude Employee · Nov 1, 2014 -

- Fit Test
- H2S Awareness
- Chlorine Shack Safety (exempt)

Show 21 other records

Legend

Competency Needed		Attention Period	
This competency is required but not active.		This indicates that this competency must be completed soon.	
Competency Active		Enrollment Allowed	
This competency is complete and not expired.		This is the first date when a worker can enroll in training for this competency.	
Attention Needed		Enrolled (Upcoming)	
This competency needs attention. It is needed (either now or will be within the attention period), but training has either not been scheduled or is past due.		The worker has enrolled in training, and the training deadline is in the future.	
Current Position		Enrolled (Overdue)	
The position is current for this period of time.		The worker has enrolled in training, but the training deadline has passed.	

Continued on next page....

Continued from previous page....

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 required 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, it 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.

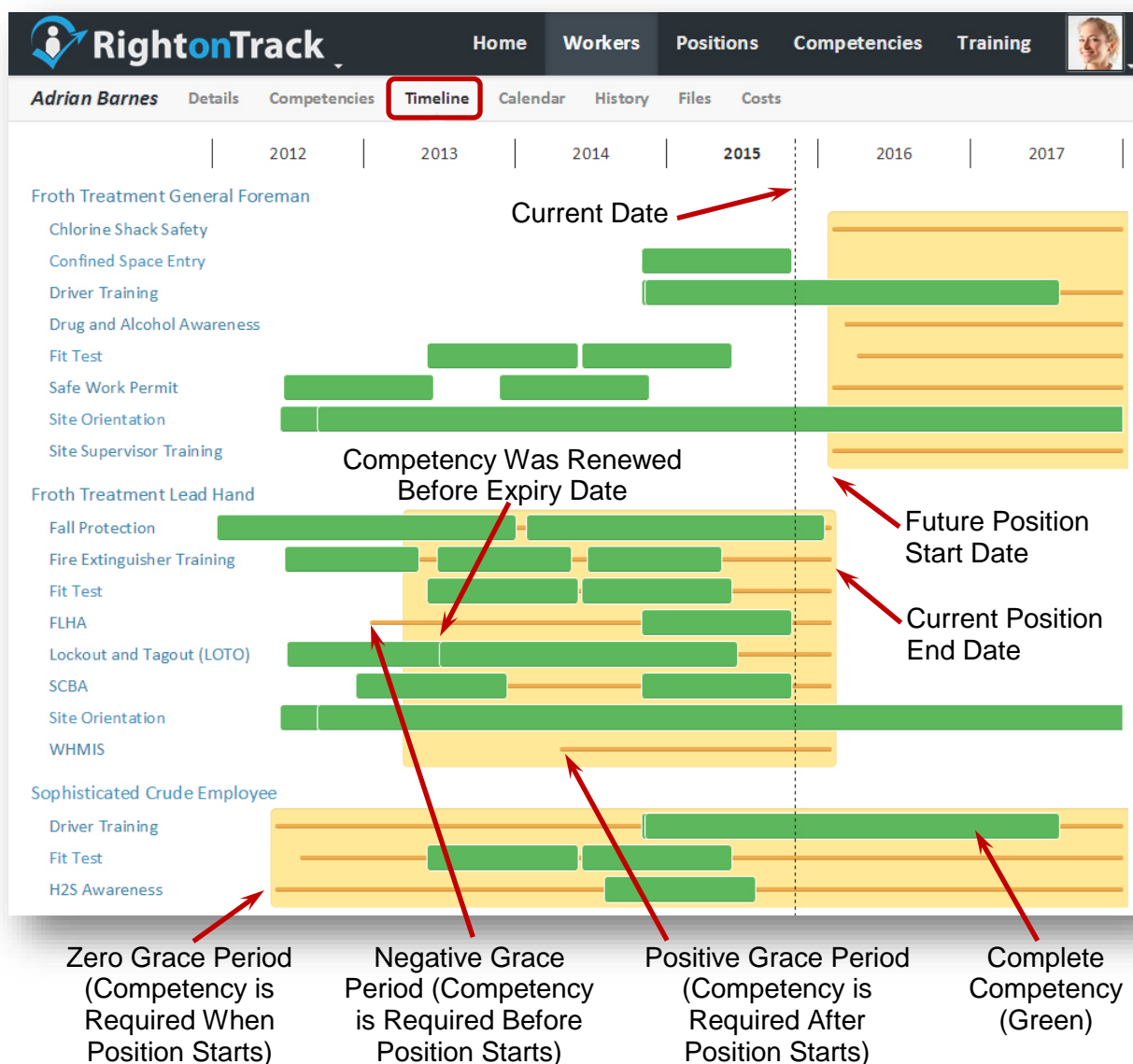
The timeline at the top of the screen shows the dates, with the current year in **bold** text. The vertical dashed line indicates today's date. The timeline shows the entire competency and position history for the selected worker.

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.

The screenshot shows the RightOnTrack web application interface. The top navigation bar includes links for Home, Workers, Positions, Competencies, and Training. The user profile for Adrian Barnes is visible on the right. Below the navigation bar, the 'Calendar' tab is selected and highlighted with a red box. The calendar displays training events and deadlines for Adrian Barnes, organized by week. The current week shown is November 12, 2014. The calendar includes a table with columns for days of the week and rows for dates. Training events are listed with their names, locations, and times. Some events are marked as 'not confirmed'. Gaps in the calendar are indicated by '(5 weeks)' and '(41 weeks)'. The calendar also shows the year 2015.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 10	Nov 11	Nov 12	Nov 13	Nov 14	Nov 15	Nov 16
Nov 17	Nov 18	Nov 19	Nov 20	Nov 21	Nov 22	Nov 23
				Complete Online FLHA Training Training Deadline		
Nov 24	Nov 25	Nov 26	Nov 27	Nov 28	Nov 29	Nov 30
	Pumps Classroom Course #1 Red Deer Office 3:30 pm to 9:15 pm (not confirmed)	Pumps Classroom Course #1 Red Deer Office 8:30 am to 6 pm (not confirmed)			Drug and Alcohol Awareness Class #1 Keyano College 7 am to 9 pm	
(5 weeks)						
2015						
Jan 5	Jan 6	Jan 7	Jan 8	Jan 9	Jan 10	Jan 11
		Driver Training (SCORM) Online Course Deadline				
(41 weeks)						
Oct 26	Oct 27	Oct 28	Oct 29	Oct 30	Oct 31	Nov 1
		Confined Space Entry Booklet Training Deadline				

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

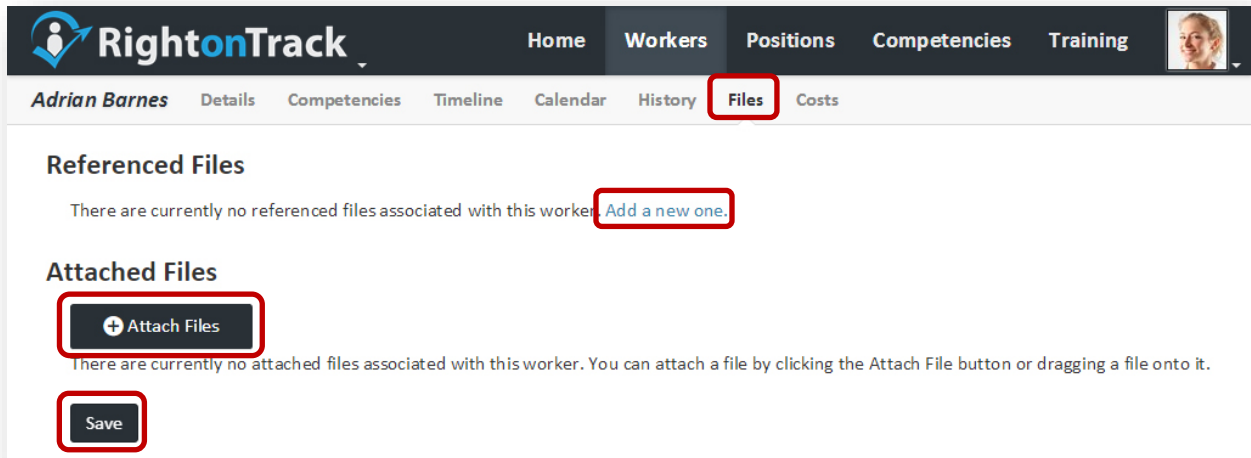
Reference or Attach a Worker File

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.




RightOnTrack Home Workers Positions Competencies Training

Adrian Barnes Details Competencies Timeline Calendar History **Files** Costs

Referenced Files

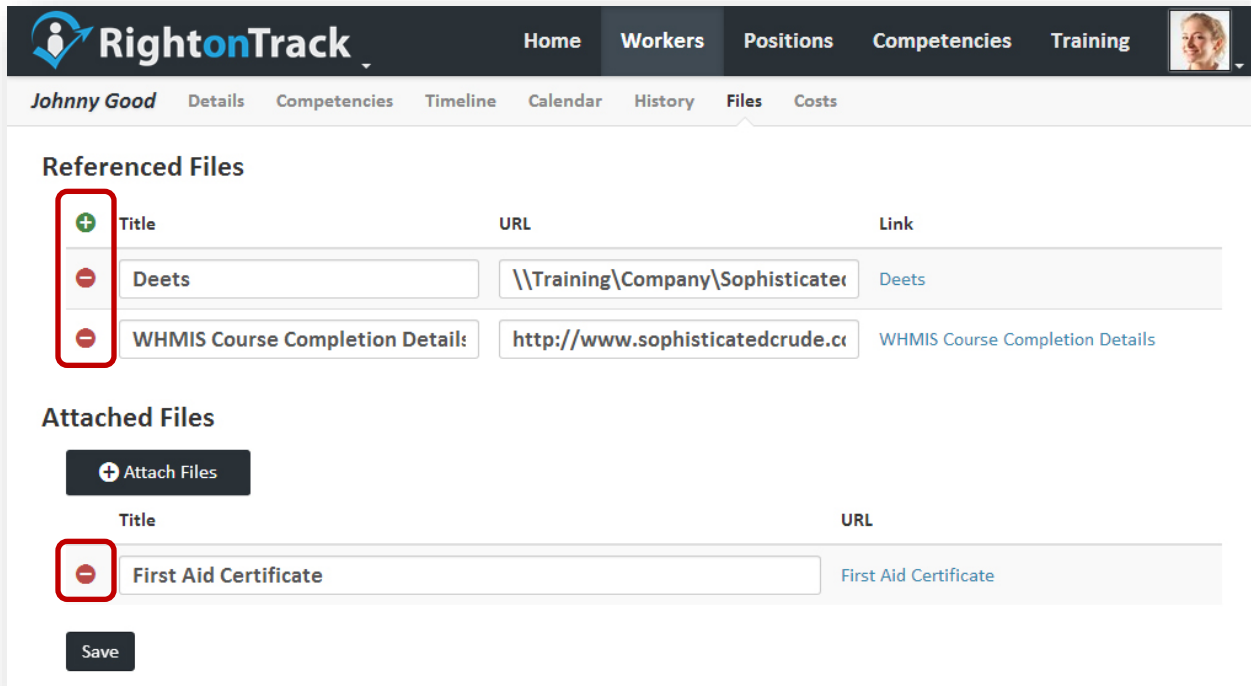
There are currently no referenced files associated with this worker. [Add a new one.](#)

Attached Files

 Attach Files

There are currently no attached files associated with this worker. You can attach a file by clicking the Attach File button or dragging a file onto it.




Save




RightOnTrack Home Workers Positions Competencies Training


Johnny Good Details Competencies Timeline Calendar History **Files** Costs

Referenced Files

	Title	URL	Link
	Deets	\\Training\\Company\\Sophisticated	Deets
	WHMIS Course Completion Details	http://www.sophisticatedcrude.ca	WHMIS Course Completion Details

Attached Files

 Attach Files

	Title	URL
	First Aid Certificate	First Aid Certificate


Save

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.



 **RightOnTrack**

HomeWorkersPositionsCompetenciesTraining


Johnny Good


DetailsCompetenciesTimelineCalendarHistoryFilesCosts

Referenced Files

	Title	URL	Link
	Deets	\\Training\Company\Sophisticated	Deets
	WHMIS Course Completion Detail:	http://www.sophisticatedcrude.c	WHMIS Course Completion Details

Attached Files

 Attach Files

	Title	URL
	First Aid Certificate	First Aid Certificate

Save

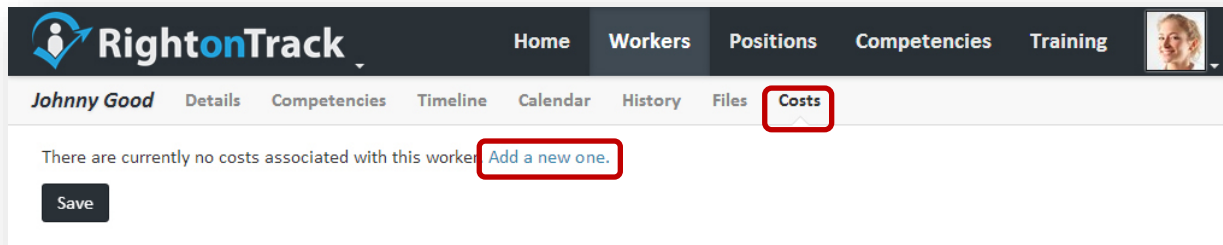
Add a Worker Cost

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, H₂S 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.





RightOnTrack

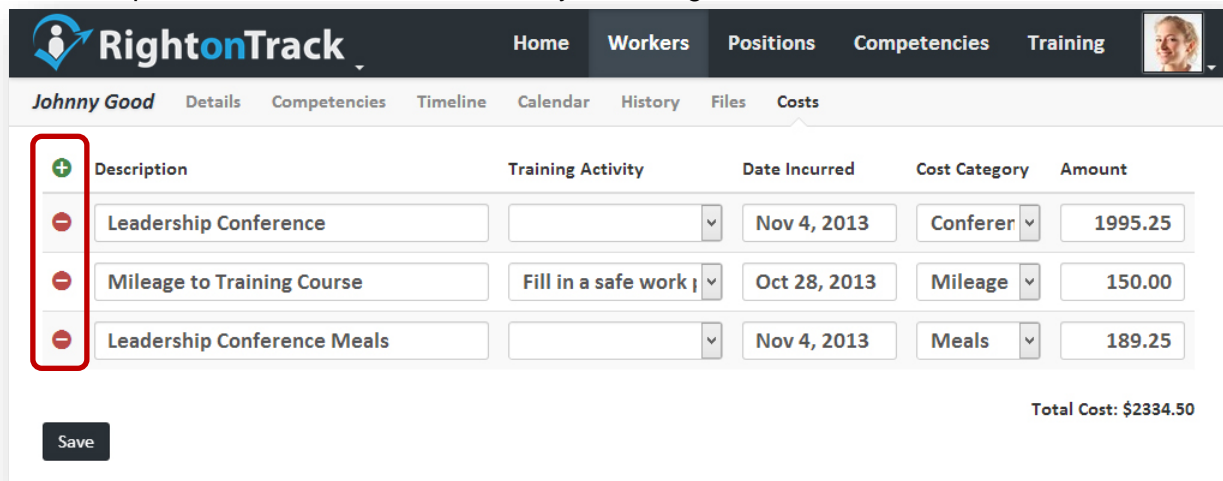
Home Workers Positions Competencies Training

Johnny Good Details Competencies Timeline Calendar History Files **Costs**

There are currently no costs associated with this worker. [Add a new one.](#)

Save





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.



RightOnTrack

Home Workers Positions Competencies Training

Johnny Good Details Competencies Timeline Calendar History Files **Costs**

	Description	Training Activity	Date Incurred	Cost Category	Amount
	Leadership Conference		Nov 4, 2013	Conferer	1995.25
	Mileage to Training Course	Fill in a safe work	Oct 28, 2013	Mileage	150.00
	Leadership Conference Meals		Nov 4, 2013	Meals	189.25

Total Cost: \$2334.50

Save

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.

RightOnTrack Home Workers Positions Competencies Training

List Grid

New Position • New Position Category

search

All Operators
Extraction Control Room Operator
Extraction Corridor Operator
Extraction Dry End Operator
Extraction Flotation Operator
Extraction Shift Team Lead
Extraction Wet End Operator
Froth Treatment Control Room Operator
Froth Treatment Cyclone Operator
Froth Treatment Froth Feed Operator
Froth Treatment Shift Team Lead
See all 14 positions.

Extraction Operators, Samplers, and Labourers
Extraction Control Room Operator
Extraction Corridor Operator
Extraction Dry End Operator
Extraction Flotation Operator
Extraction Labourer
Extraction Sampler
Extraction Shift Team Lead
Extraction Wet End Operator

Froth Treatment Operators & Samplers
Froth Treatment Control Room Operator
Froth Treatment Cyclone Operator
Froth Treatment Froth Feed Operator
Froth Treatment Lead Hand
Froth Treatment Shift Team Lead

Utilities Operators
Utilities Control Room Operator
Utilities General Foreman
Utilities Lead Hand
Utilities Shift Team Lead
Utilities Tank Farm Operator
Utilities Water Treatment Area Operator

Universal Positions
Sophisticated Crude Contractor
Sophisticated Crude Employee

Uncategorized
Bitumen Processing Engineering Student
Bitumen Processing Office Manager
Bitumen Processing Reliability Engineer
Chief Maintenance Engineer
East Camp Janitor
Engineering Vice President
Extraction General Foreman
Froth Treatment Maintenance Engineer
Froth Treatment General Foreman
Froth Treatment Receptionist
See all 15 positions.

Office Staff
Bitumen Processing Vice President
Extraction Assistant Trainer
Extraction Training Coordinator
Froth Treatment Assistant Trainer
Froth Treatment Training Coordinator
Personal Assistant To VP Bitumen Processing
Personal Assistant To VP Mining
President
Upgrading Vice President
Utilities Assistant Trainer
See all 11 positions.

Bitumen Processing Engineering Student
Workers: 2 past, **3 present**, 1 future
Requires 4 competencies.

Bitumen Processing Office Manager
Workers: 0 past, **0 present**, 0 future
Requires 5 competencies.

Bitumen Processing Vice President
Office Staff
Workers: 1 past, **0 present**, 0 future
Requires 4 competencies.

Chief Maintenance Engineer
Workers: 0 past, **0 present**, 0 future
Requires 0 competencies.

Bitumen Processing Reliability Engineer
Workers: 1 past, **0 present**, 0 future
Requires 2 competencies.

Extraction Assistant Trainer
Office Staff
Workers: 1 past, **2 present**, 2 future
Requires 17 competencies.

East Camp Janitor
Workers: 1 past, **1 present**, 0 future
Requires 2 competencies.

Engineering Vice President
Workers: 1 past, **0 present**, 0 future
Requires 2 competencies.

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.

A screenshot of the 'New Position' form in the RightOnTrack application. The form has a title 'New Position' and a label 'Position Name *' next to a text input field. The input field contains the text 'Water Treatment Operator'. Below the input field is a 'Create' button, which is highlighted with a red rectangle.

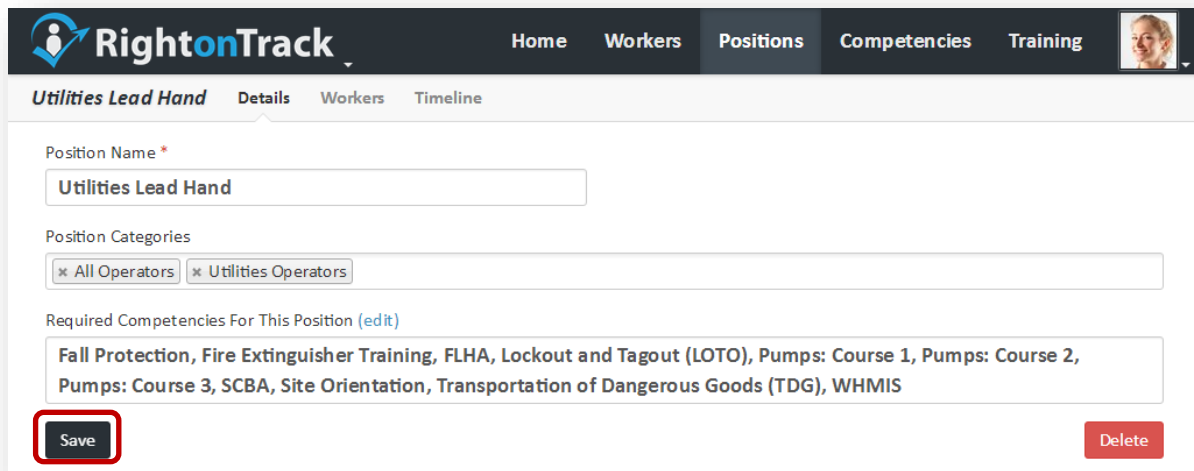
Edit Position Details

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](#).



The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Positions' tab is active. Below the navigation bar, the 'Utilities Lead Hand' position is selected, and the 'Details' sub-tab is active. The form contains the following fields:

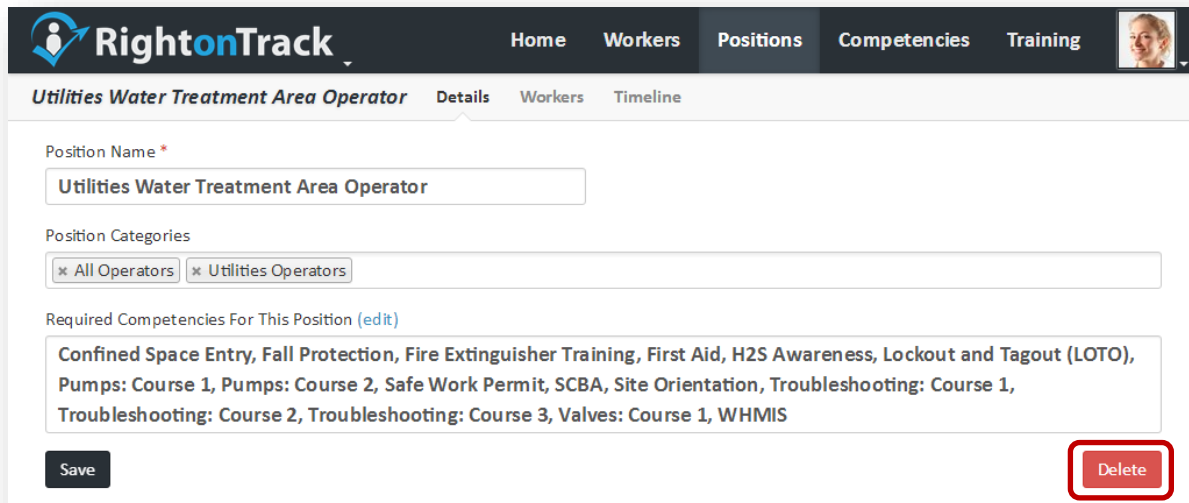
- Position Name ***: A text box containing 'Utilities Lead Hand'.
- Position Categories**: A list of categories with checkboxes, including 'All Operators' and 'Utilities Operators'.
- Required Competencies For This Position (edit)**: A text box containing 'Fall Protection, Fire Extinguisher Training, FLHA, Lockout and Tagout (LOTO), Pumps: Course 1, Pumps: Course 2, Pumps: Course 3, SCBA, Site Orientation, Transportation of Dangerous Goods (TDG), WHMIS'.

At the bottom of the form, there are two buttons: a 'Save' button (highlighted with a red box) and a 'Delete' button.

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.



The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Positions' tab is active, and the sub-tab 'Details' is selected for the position 'Utilities Water Treatment Area Operator'. The form contains the following fields:

- Position Name ***: A text input field containing 'Utilities Water Treatment Area Operator'.
- Position Categories**: A multi-select dropdown menu with 'All Operators' and 'Utilities Operators' selected.
- Required Competencies For This Position (edit)**: A text area containing a list of competencies: 'Confined Space Entry, Fall Protection, Fire Extinguisher Training, First Aid, H2S Awareness, Lockout and Tagout (LOTO), Pumps: Course 1, Pumps: Course 2, Safe Work Permit, SCBA, Site Orientation, Troubleshooting: Course 1, Troubleshooting: Course 2, Troubleshooting: Course 3, Valves: Course 1, WHMIS'.

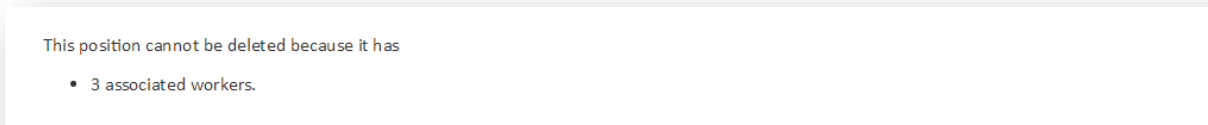
At the bottom of the form, there are two buttons: a 'Save' button on the left and a 'Delete' button on the right, which is highlighted with a red rectangular border.

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





The screenshot shows a confirmation dialog box with the text: 'Are you sure you want to delete this position?'. Below the text is a single button labeled 'Delete', which is highlighted with a red rectangular border.

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



The screenshot shows an error message box with the text: 'This position cannot be deleted because it has' followed by a bulleted list: '• 3 associated workers.'


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.

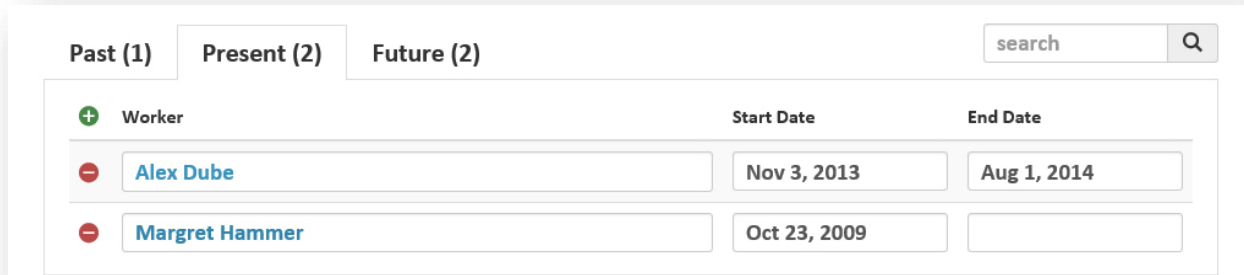
Note: Do not delete past positions; give them an end date instead. When you change the start and end dates of a position, it will automatically move to the past, present, or future tab based on the new dates.



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.



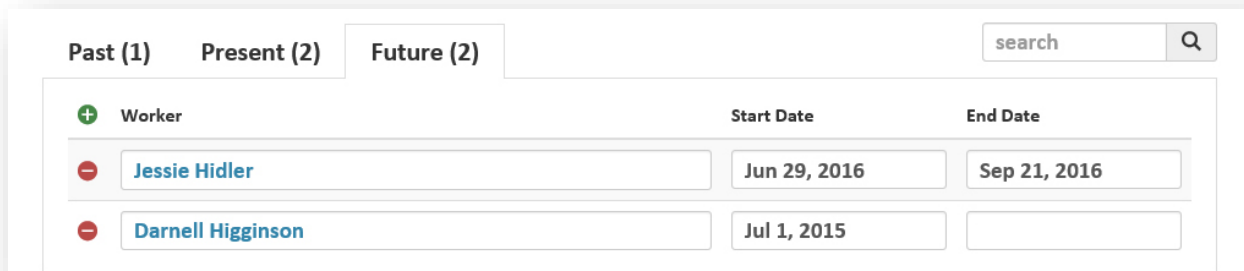
Worker	Start Date	End Date
 Charita Budniewski	Aug 10, 2009	May 12, 2010



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.



Worker	Start Date	End Date
 Alex Dube	Nov 3, 2013	Aug 1, 2014
 Margret Hammer	Oct 23, 2009	

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.



Worker	Start Date	End Date
 Jessie Hidler	Jun 29, 2016	Sep 21, 2016
 Darnell Higginson	Jul 1, 2015	

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.

A screenshot of the 'New Position Category' form. It has a title 'New Position Category'. Below it is a label 'Position Category Name *' and a text input field containing 'Health and Safety Training'. At the bottom left, a 'Create' button is highlighted with a red rectangle.

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.

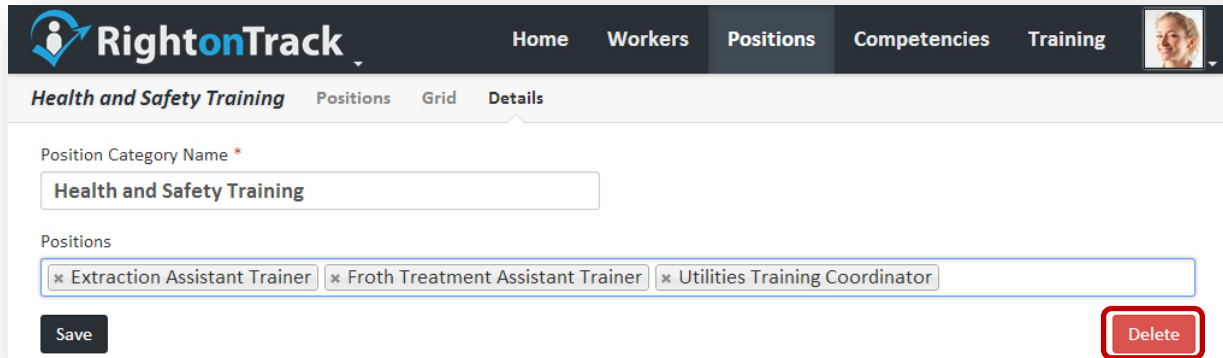
Note: To search available options, click inside the box and begin typing.

A screenshot of the 'Details' tab for the 'Health and Safety Training' position category. The top navigation bar is the same. Below it, there are tabs for 'Positions', 'Grid', and 'Details', with 'Details' being active. The form shows the 'Position Category Name' as 'Health and Safety Training'. Below this is a 'Positions' section with a text input field containing three items: '✕ Extraction Assistant Trainer', '✕ Froth Treatment Assistant Trainer', and '✕ Utilities Training Coordinator'. At the bottom left, a 'Save' button is highlighted with a red rectangle. At the bottom right, there is a 'Delete' button.

Delete a Position Category

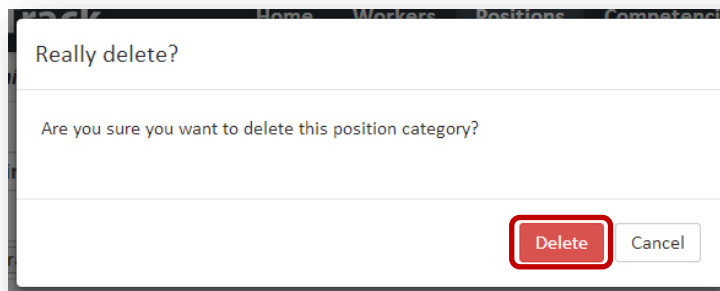
Click on the **"Positions"** tab. [Search](#) to find the position category you wish to delete, then click on the gear icon (⚙️) beside the title to bring up the **"Details"** tab for the position category.

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



The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Positions' tab is active, and the 'Details' sub-tab is selected. The main content area shows the 'Position Category Name' as 'Health and Safety Training'. Below this, the 'Positions' section lists three categories: 'Extraction Assistant Trainer', 'Froth Treatment Assistant Trainer', and 'Utilities Training Coordinator'. At the bottom right, there is a red 'Delete' button.

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



The screenshot shows a confirmation dialog box with the title 'Really delete?'. The text inside asks, 'Are you sure you want to delete this position category?'. At the bottom right, there are two buttons: a red 'Delete' button and a white 'Cancel' button.

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.

The screenshot shows the RightOnTrack web application interface. The top navigation bar includes the RightOnTrack logo and tabs for Home, Workers, Positions, Competencies (selected), and Training. A user profile picture is visible in the top right corner. Below the navigation bar, there are tabs for List, Archived, and Grid. A search bar is located in the top right of the main content area. The main content area displays a grid of competency categories, each with a folder icon, a title, a list of sub-competencies, and a gear icon for details. The categories shown are: Computer-Based Training (CBT), Archived, Drug and Alcohol Awareness For Supervisors, Fire Extinguisher Training, Mandatory Safety Training, Driver Training, Fall Protection, Office Staff Training, Uncategorized, Confined Space Entry, and Field Level Hazard Assessment (FLHA).

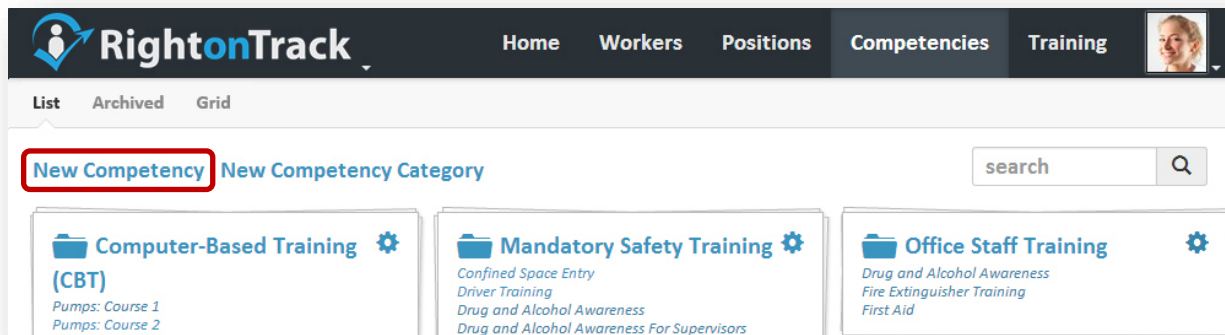
Note: Competency categories are indicated by a folder icon (). Competencies that are not in a competency category are listed under **"Uncategorized."**

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

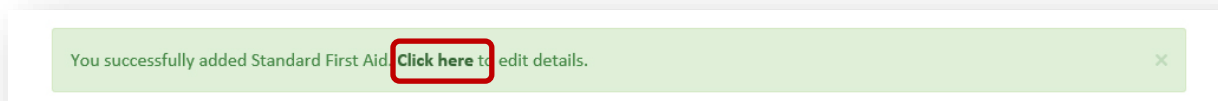
Click on the "**Competencies**" tab. Click on the "**New Competency**" link.



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

A screenshot of the 'New Competency' form. The form has several sections: 'Competency Name' with a text input field containing 'Standard First Aid'; 'Description' with a text input field containing 'Standard First Aid Certificate'; 'Prerequisites' with a dropdown menu showing 'x Site Orientation'; and 'Competency Categories' with two selected categories: 'x Mandatory Safety Training' and 'x Office Staff Training'. At the bottom left of the form, there is a 'Create' button highlighted with a red box.

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](#).

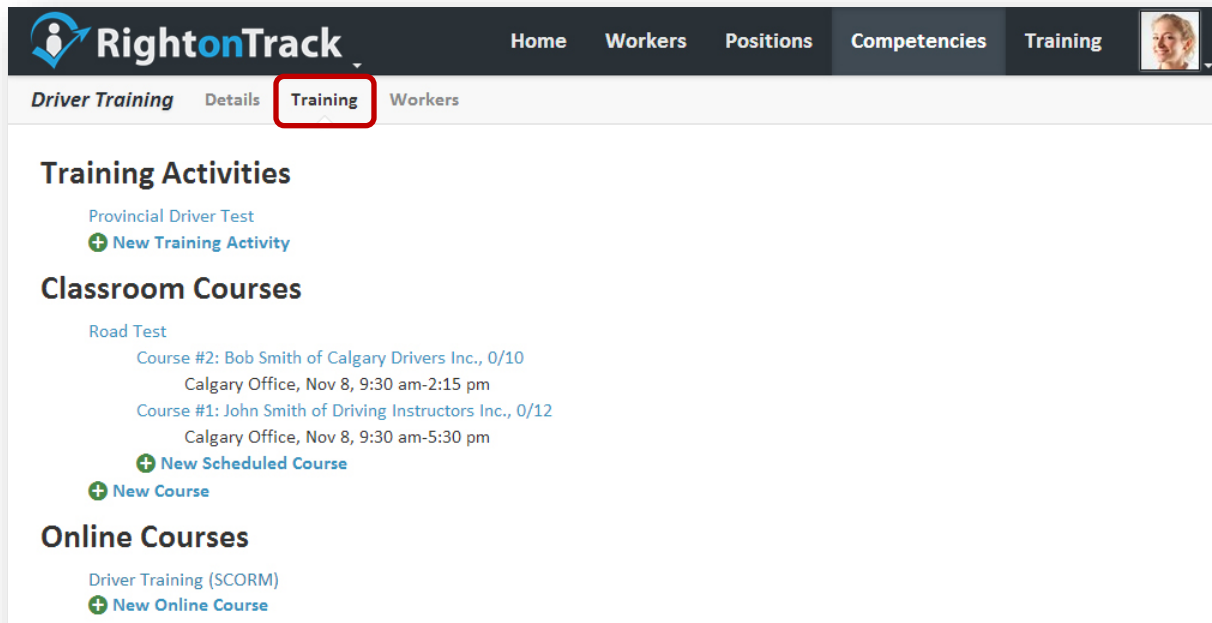
The screenshot shows the 'RightOnTrack' web application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Competencies' tab is active, and the 'Details' sub-tab is selected for the 'Standard First Aid' competency. The form contains the following fields and sections:

- Competency Name ***: A text box containing 'Standard First Aid'.
- Archived**: A checkbox labeled 'Archived' with a note: 'Archived competencies cannot be chosen as a training method's associated competency and do not show up on the list of competencies.'
- Description**: A text box containing 'St. John's Ambulance First Aid Certificate'.
- Enrollment Days Before Expiry**: A text box with a note: 'Number of days before this competency expires that workers can enroll for training. Leave blank to always allow.'
- Competency Categories**: A list of categories with checkboxes, including 'Mandatory Safety Training' and 'Office Staff Training'.
- Prerequisites**: A text box for listing prerequisite competencies.
- Positions That Require This Competency (edit)**: A text box listing various roles such as 'Extraction Assistant Trainer', 'Extraction Control Room Operator', etc.
- Exempted Workers**: A list of workers with checkboxes, including 'Alex Dube' and 'Arac Cedano'.
- Attention Period in Days**: A text box with '90 (default)' and a note: 'Length of time in days before this competency is required that lack of scheduled training should be considered urgent. If not provided, it will default to 90 days as specified on the organization settings page.'
- Grace Period in Days**: A text box with '30 (default)' and a note: 'Length of time in days after this competency starts before lack of scheduled training should be considered urgent. If not provided, it will default to 30 days as specified on the organization settings page.'
- Buttons**: A 'Save' button (highlighted with a red box) and a 'Delete' button.

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.



The screenshot shows the RightOnTrack web application interface. The top navigation bar includes links for Home, Workers, Positions, Competencies, and Training. The Training tab is selected, and a submenu is visible with options for Driver Training, Details, Training (highlighted with a red box), and Workers. The main content area displays three sections: Training Activities, Classroom Courses, and Online Courses. Each section includes a list of items and a '+ New' link to create new content.

RightOnTrack Home Workers Positions **Competencies** Training

Driver Training Details **Training** Workers

Training Activities

Provincial Driver Test
[+ New Training Activity](#)

Classroom Courses

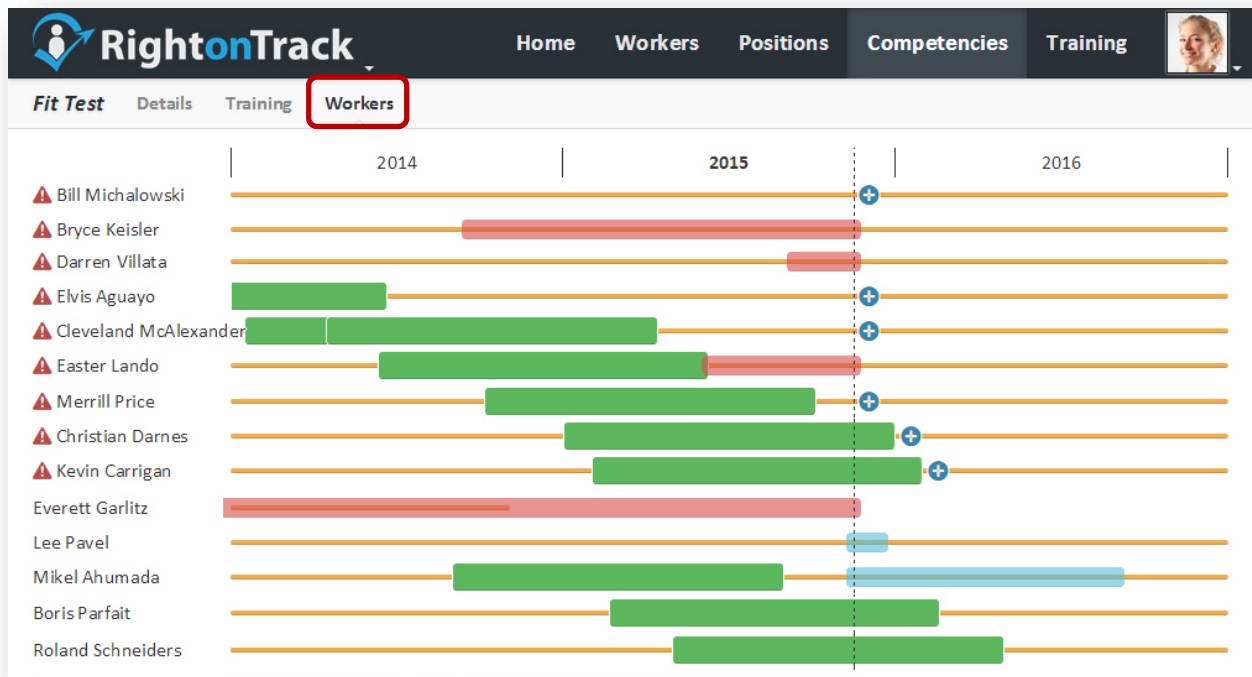
Road Test
Course #2: Bob Smith of Calgary Drivers Inc., 0/10
Calgary Office, Nov 8, 9:30 am-2:15 pm
Course #1: John Smith of Driving Instructors Inc., 0/12
Calgary Office, Nov 8, 9:30 am-5:30 pm
[+ New Scheduled Course](#)
[+ New Course](#)

Online Courses

Driver Training (SCORM)
[+ New Online Course](#)

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.

Fit Test: Cleveland McAlexander

Required by Position	Begin Date	End Date
Froth Treatment Maintenance Engineer	Apr 16, 2013	-
Sophisticated Crude Employee	Jan 1, 2011	-

Training Activity	Deadline	Completed	Passed	Competency
Demonstrate a Fit Test	Oct 18, 2014	Apr 16, 2014	✓	Apr 16, 2014 to Apr 16
Demonstrate a Fit Test	Apr 16	Jan 16, 2014	✓	Jan 16, 2014 to Jan 16

Cancel

Continued on next page....

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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).

The screenshot shows a modal window titled "Driver Training: Alex Dube". It lists available training options: "Road Test #2, Nov 8, 0/10 enrolled" (selected), "Training Activities" (Provincial Driver Test), "Classroom Courses" (Road Test #1, Nov 8, 1/12 enrolled; Road Test #2, Nov 8, 0/10 enrolled), and "Online Courses" (Driver Training (SCORM)). At the bottom right are "Cancel" and "Enroll" buttons.

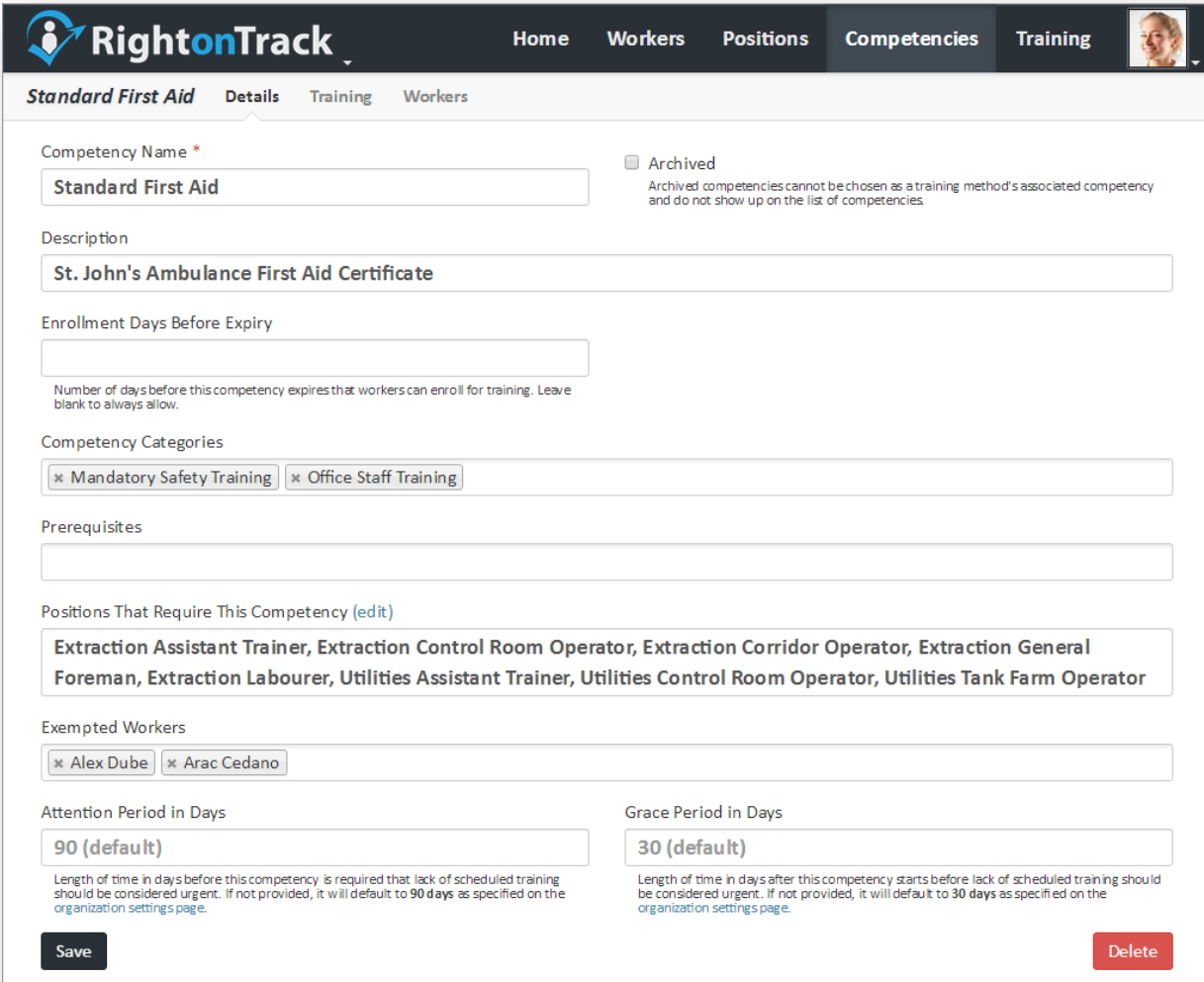
Click on a **green bar** to view the details for a completed competency. Click on a **blue bar** or **red bar** to view the details for an enrollment.

The screenshot shows a modal window titled "Driver Training: Arac Cedano". It displays "Driver Training (SCORM)" with a "Take Course" link and a "Deadline Date" of "Dec 5, 2013". At the bottom are "Unregister", "Cancel", and "Update" buttons. The "Update" button is highlighted with a red rectangle.

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.



RightOnTrack Home Workers Positions Competencies Training

Standard First Aid Details Training Workers

Competency Name *

☐ Archived
Archived competencies cannot be chosen as a training method's associated competency and do not show up on the list of competencies.

Description

Enrollment Days Before Expiry

Number of days before this competency expires that workers can enroll for training. Leave blank to always allow.

Competency Categories

Prerequisites

Positions That Require This Competency [\(edit\)](#)

Exempted Workers

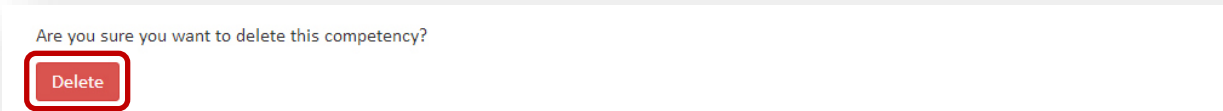
Attention Period in Days

Length of time in days before this competency is required that lack of scheduled training should be considered urgent. If not provided, it will default to 90 days as specified on the organization settings page.

Grace Period in Days

Length of time in days after this competency starts before lack of scheduled training should be considered urgent. If not provided, it will default to 30 days as specified on the organization settings page.

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



Are you sure you want to delete this competency?

Continued on next page....

Continued from previous page....

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.

This competency cannot be deleted because it has

- 0 classroom courses associated.
- 22 worker competency records associated.

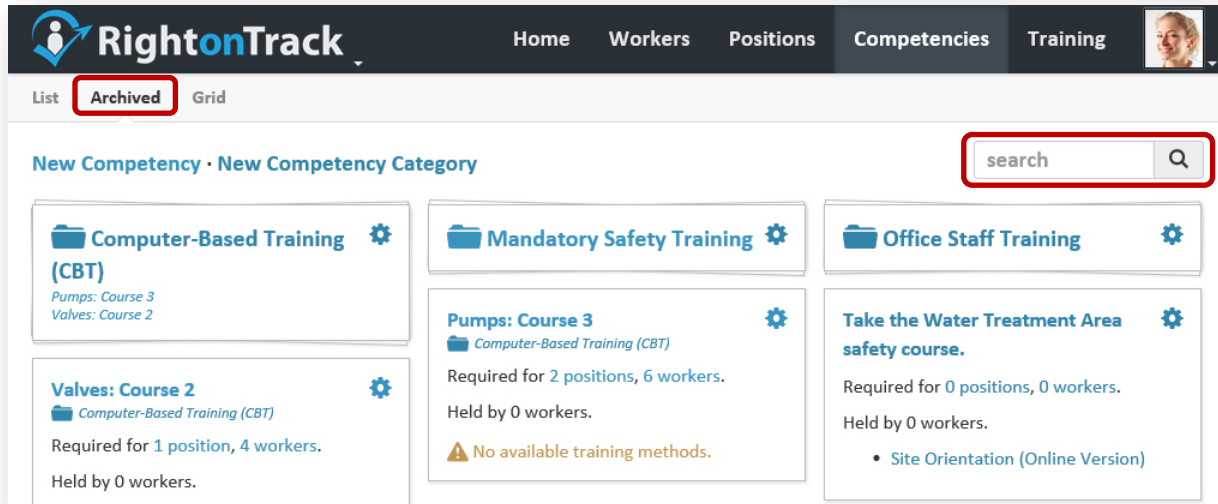
Do you want to archive this competency instead by removing? Archived competencies do not show up unless searched for, and they are not included as options in menus.

Archive

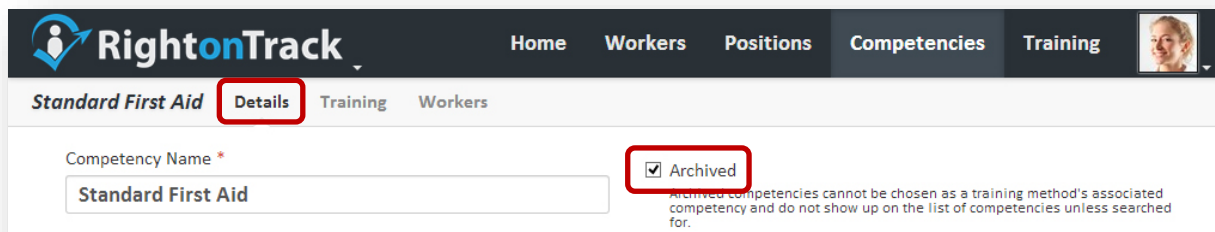
Reinstate an Archived Competency

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.

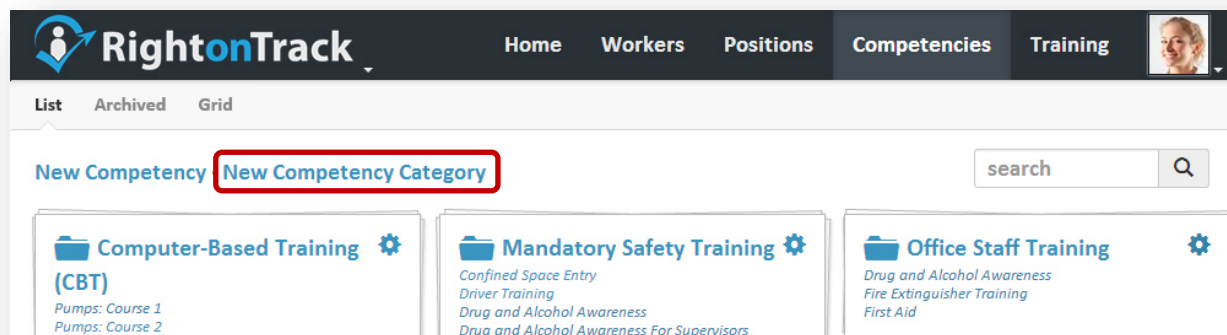


Uncheck the **"Archived"** checkbox to reinstate the archived competency. When finished, click the **"Save"** button to save your changes.



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.

A screenshot of the "New Competency Category" form. The title "New Competency Category" is at the top. Below it, the label "Competency Category Name *" is followed by a text input field containing the text "Mandatory Safety Training". Below the input field is a "Create" button, which is highlighted with a red rectangle.

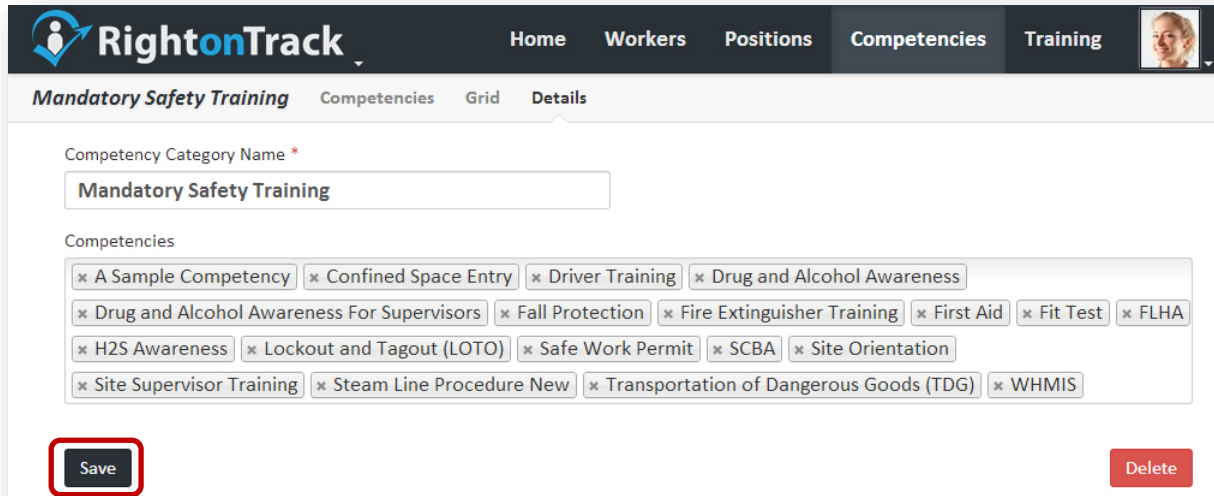
Edit Competency Category Details

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.

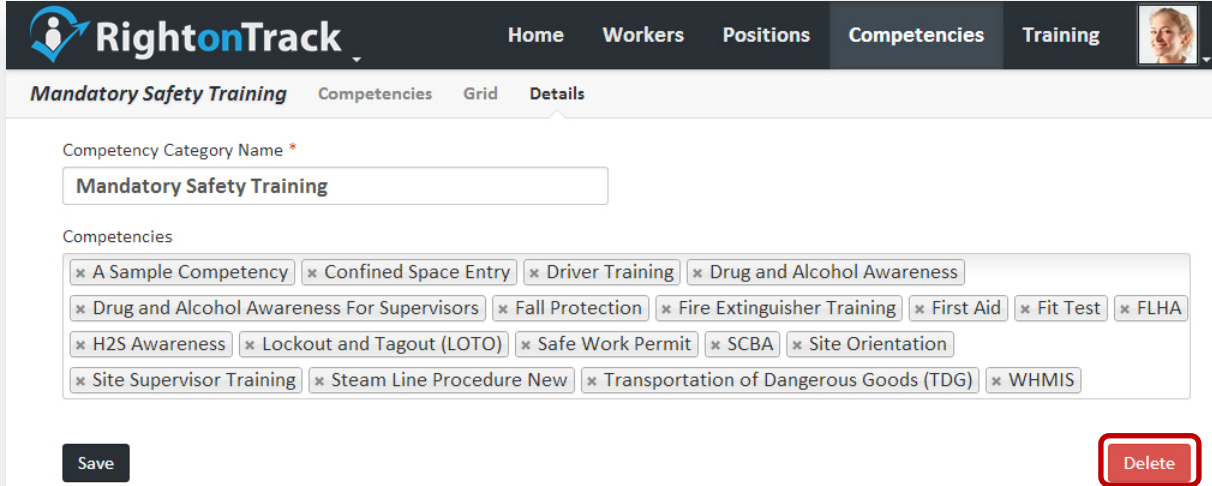


The screenshot shows the 'RightOnTrack' web application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Competencies' tab is active. Below the navigation bar, there are sub-tabs: 'Mandatory Safety Training', 'Competencies', 'Grid', and 'Details'. The 'Details' tab is selected. The form contains a 'Competency Category Name' field with the text 'Mandatory Safety Training'. Below this is a 'Competencies' section with a list of competency tags, each preceded by an 'x' icon for removal. The tags are: 'A Sample Competency', 'Confined Space Entry', 'Driver Training', 'Drug and Alcohol Awareness', 'Drug and Alcohol Awareness For Supervisors', 'Fall Protection', 'Fire Extinguisher Training', 'First Aid', 'Fit Test', 'FLHA', 'H2S Awareness', 'Lockout and Tagout (LOTO)', 'Safe Work Permit', 'SCBA', 'Site Orientation', 'Site Supervisor Training', 'Steam Line Procedure New', 'Transportation of Dangerous Goods (TDG)', and 'WHMIS'. At the bottom left, there is a 'Save' button highlighted with a red rectangle. At the bottom right, there is a 'Delete' button.

Delete a Competency Category

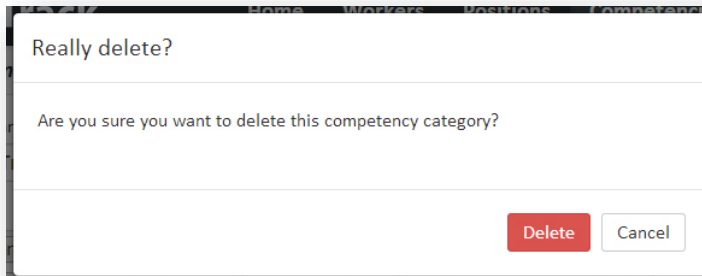
Click on the "**Competencies**" tab. [Search](#) to find the competency category you wish to delete, then click on the gear icon (⚙️) beside the title to bring up the "**Details**" tab for the competency category.

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



The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Competencies' tab is active, and the 'Details' sub-tab is selected for the 'Mandatory Safety Training' category. The form contains a 'Competency Category Name' field with the value 'Mandatory Safety Training'. Below this is a 'Competencies' section with a grid of tags, each preceded by an 'x' icon. The tags include: 'A Sample Competency', 'Confined Space Entry', 'Driver Training', 'Drug and Alcohol Awareness', 'Drug and Alcohol Awareness For Supervisors', 'Fall Protection', 'Fire Extinguisher Training', 'First Aid', 'Fit Test', 'FLHA', 'H2S Awareness', 'Lockout and Tagout (LOTO)', 'Safe Work Permit', 'SCBA', 'Site Orientation', 'Site Supervisor Training', 'Steam Line Procedure New', 'Transportation of Dangerous Goods (TDG)', and 'WHMIS'. At the bottom of the form are two buttons: 'Save' on the left and 'Delete' on the right, which is highlighted with a red border.

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



The screenshot shows a modal dialog box with the title 'Really delete?'. The main text inside the dialog asks, 'Are you sure you want to delete this competency category?'. At the bottom right of the dialog are two buttons: 'Delete' (highlighted in red) and 'Cancel'.

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.



The screenshot shows the RightOnTrack application interface. At the top, there's a navigation bar with tabs: Home, Workers, Positions, Competencies, and Training. The 'Grid' tab is selected under the 'Positions' section. Below the navigation bar, there are two dropdown menus: 'Position Categories' set to 'Utilities Operators' and 'Competency Categories' set to 'Mandatory Safety Training'. Below these, there's an 'Edit' dropdown menu set to 'Mandatory/Optional'. A 'Save 12 Changes' button is visible. The main area is a grid with rows for different job positions and columns for various competencies. The grid cells contain 'M' for Mandatory, 'O' for Optional, and are highlighted with red flags in the upper left corner to indicate changes. The grid is as follows:

	Confined Space Entry	Driver Training	Drug and Alcohol Awareness Supervisors	Drug and Alcohol Awareness For	Fall Protection	Fire Extinguisher Training	First Aid	Fit Test	FLHA	H2S Awareness	Lockout and Tagout (LOTO)	Safe Work Permit	SCBA	Site Orientation	Site Supervisor Training	Standard First Aid	Steam Line Procedure New (TDS)	Transportation of Dangerous Goods WHMIS
Utilities Control Room Operator	M				M	O	M			M	M	M	M	M		M	M	M
Utilities General Foreman	M	M	M			M					M	M		O	O			
Utilities Lead Hand					M	M			M		M		M	M			M	M
Utilities Shift Team Lead	M	M	M	M	M	M			M	M	M		O	M			M	M
Utilities Tank Farm Operator	M				O	M	M			M	M	M	M	M		M	M	M
Utilities Water Treatment Area Operator	M			M		M	M			M	M	O	M	O				M

At the bottom left, there is another 'Save 12 Changes' button.

Continued on next page...

Continued from last page...


Home Workers Positions Competencies Training


List Grid

Position Categories
Utilities Operators



Competency Categories
Mandatory Safety Training

Edit
Attention Period in Days

Save 10 Changes

	Confined Space Entry	Driver Training	Drug and Alcohol Awareness	Drug and Alcohol Awareness For Supervisors	Fall Protection	Fire Extinguisher Training	First Aid	Fit Test	FLHA	H2S Awareness	Lockout and Tagout (LOTO)	Safe Work Permit	SCBA	Site Orientation	Site Supervisor Training	Standard First Aid	Steam Line Procedure New (TDC)	Transportation of Dangerous Goods	WHMIS
Utilities Control Room Operator	5					45	90	90		90	90	90	90	90		90	90	90	
Utilities General Foreman	5	90	30	90							90		90	90					
Utilities Lead Hand						55	90	90		90		90	90		90		90	90	
Utilities Shift Team Lead	5	90	30	55	90	90			90	90	90		90	90		90	90	90	
Utilities Tank Farm Operator	5			90		90	90	90		90	90	90	90		90		90	90	
Utilities Water Treatment Area Operator	5				90	90	90			90	90	90	90					90	

Save 10 Changes


Home Workers Positions Competencies Training


List Grid

Position Categories
Utilities Operators

Competency Categories
Mandatory Safety Training

Edit
Grace Period in Days

Save 11 Changes

	Confined Space Entry	Driver Training	Drug and Alcohol Awareness	Drug and Alcohol Awareness For Supervisors	Fall Protection	Fire Extinguisher Training	First Aid	Fit Test	FLHA	H2S Awareness	Lockout and Tagout (LOTO)	Safe Work Permit	SCBA	Site Orientation	Site Supervisor Training	Standard First Aid	Steam Line Procedure New (TDC)	Transportation of Dangerous Goods	WHMIS
Utilities Control Room Operator	3000						800			0	0	0	0	0		0		0	0
Utilities General Foreman	3000	0	30	0								0		0	0				
Utilities Lead Hand					0	0	0		0			0	0			0		0	0
Utilities Shift Team Lead	3000	0	30	0	0	0			0	0	0		0	0		0		0	0
Utilities Tank Farm Operator	3000			0		0	0	0		0	0	0	0	0		0		0	0
Utilities Water Treatment Area Operator	3000				0	0	0			0	0	0	0	0					0


Save 11 Changes

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.

The screenshot shows the RightOnTrack website interface. At the top, there is a navigation bar with the following tabs: Home, Workers, Positions, Competencies, and Training (which is highlighted). A search bar is located in the top right corner, with the word "search" and a magnifying glass icon. Below the navigation bar, there are three main categories: Training Activities, Classroom Courses, and Online Courses. Each category has a list of items. For example, under Training Activities, there are items like "Complete Online FLHA Training", "Confined Space Entry Booklet", and "Fire Extinguisher Training In The Field". Under Classroom Courses, there are items like "Fall Protection Class", "First Aid Class", and "H2S Awareness Classroom Course". Under Online Courses, there are items like "Driver Training (SCORM)", "Golf Training (SCORM)", and "H2S Awareness Online Course". There is also an "Archived" section with items like "H2S Awareness Online Course" and "Perform a Fit Test". Each item has a gear icon next to it, indicating a settings page.

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.

A screenshot of the 'New Training Activity' form. The form has a title 'New Training Activity' and two main input fields. The first field is labeled 'Training Activity Name *' and contains the text 'Demonstrate SOP-0001A in the field.'. The second field is labeled 'Completes Competency *' and is a dropdown menu showing 'SOP-0001A Competency'. Below these fields is a 'Create' button, which is highlighted with a red box.

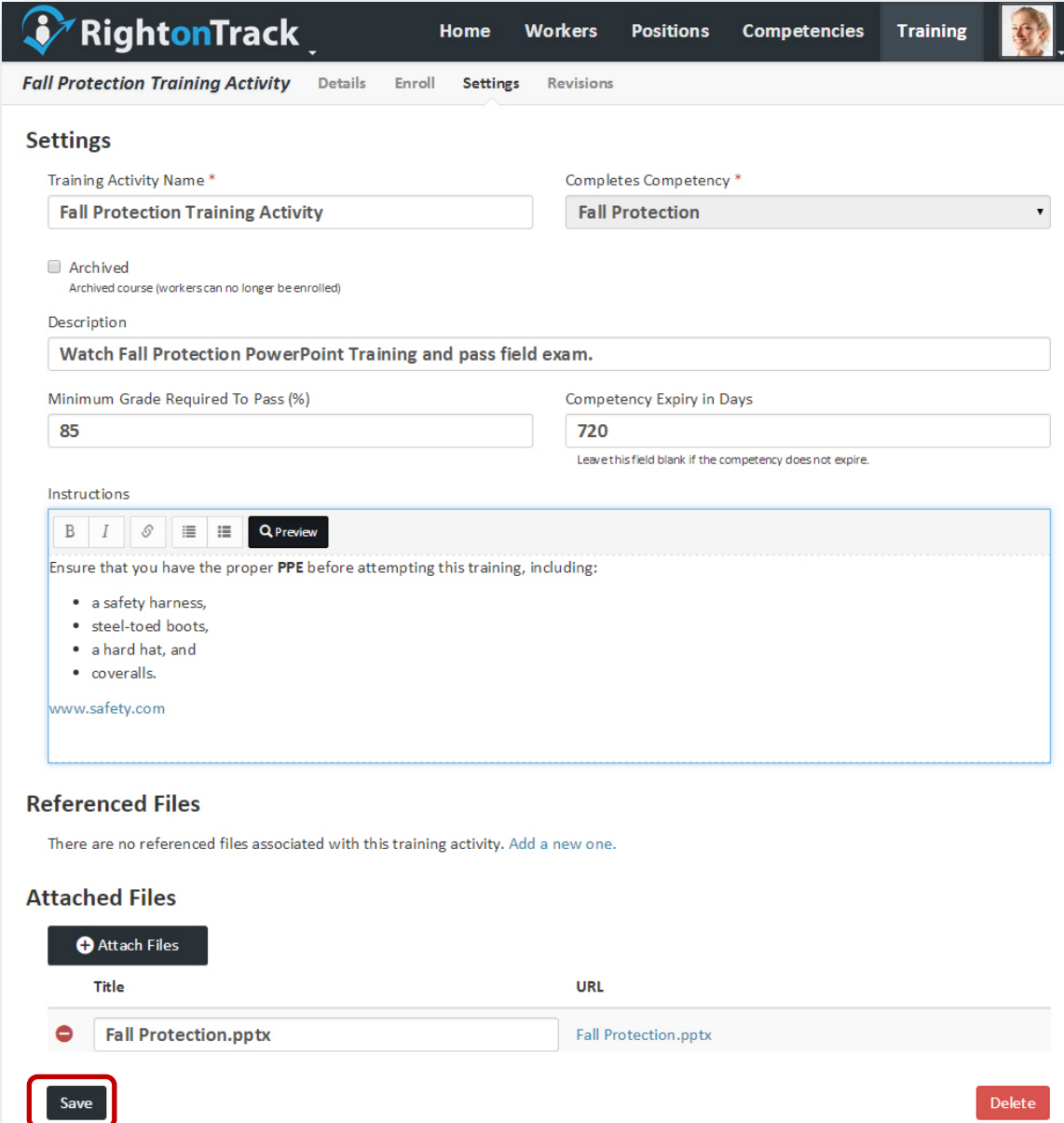
Edit a Training Activity

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.



The screenshot shows the 'Settings' page for a training activity in the RightOnTrack system. The page has a dark header with the 'RightOnTrack' logo and navigation tabs: Home, Workers, Positions, Competencies, and Training. Below the header, there's a sub-header for 'Fall Protection Training Activity' with tabs for Details, Enroll, Settings (selected), and Revisions. The 'Settings' section includes fields for 'Training Activity Name' (Fall Protection Training Activity), 'Completes Competency' (Fall Protection), an 'Archived' checkbox, a 'Description' field (Watch Fall Protection PowerPoint Training and pass field exam.), 'Minimum Grade Required To Pass (%)' (85), and 'Competency Expiry in Days' (720). There's an 'Instructions' section with a rich text editor containing a bulleted list of PPE requirements and a link to www.safety.com. Below this is a 'Referenced Files' section with a message that there are no files associated. The 'Attached Files' section shows a table with one file, 'Fall Protection.pptx', and a 'Save' button highlighted with a red box.

RightOnTrack

Home Workers Positions Competencies Training

Fall Protection Training Activity Details Enroll Settings Revisions

Settings

Training Activity Name *
Fall Protection Training Activity

Completes Competency *
Fall Protection




☐ Archived
Archived course (workers can no longer be enrolled)

Description
Watch Fall Protection PowerPoint Training and pass field exam.

Minimum Grade Required To Pass (%)
85

Competency Expiry in Days
720
Leave this field blank if the competency does not expire.

Instructions

B I    Preview

Ensure that you have the proper **PPE** before attempting this training, including:


- a safety harness,
- steel-toed boots,
- a hard hat, and
- coveralls.


www.safety.com



Referenced Files

There are no referenced files associated with this training activity. [Add a new one.](#)

Attached Files

 Attach Files

Title	URL
 Fall Protection.pptx	Fall Protection.pptx





 

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:

Instructions

B *I*     Preview





Ensure that you have the proper ****PPE**** before attempting this training, including:

- a safety harness,
- steel-toed boots,
- a hard hat, and
- coveralls.

[www.safety.com](<http://www.safety.com>)

The same text is shown in preview mode below:

Instructions

B *I*     Preview

Ensure that you have the proper **PPE** before attempting this training, including:

- a safety harness,
- steel-toed boots,
- a hard hat, and
- coveralls.

www.safety.com

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](#).

The screenshot shows the 'RightOnTrack' web application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Training' tab is active, showing a dropdown menu with 'Fall Protection Training Activity', 'Details', 'Enroll', 'Settings', and 'Revisions'. The 'Revisions' tab is selected, displaying a table of 'Past Revisions' with columns for 'Delete', 'Date', and 'Revisions'. Below the table is a 'New Revision' section with a 'Revision Date' field set to 'Nov 16, 2015' and a 'Revisions' text area with a rich text editor toolbar. A 'Save' button is highlighted with a red box at the bottom left.

Delete	Date	Revisions
<input type="checkbox"/>	Sep 8	See Dave before performing the fall protection demo - the equipment has been moved to locker C.
<input type="checkbox"/>	Nov 25	Additional PowerPoint files have been added.

New Revision

Revision Date
Nov 16, 2015

Revisions

B I [Link] [List] [Table] Preview

Save

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"**.

Fall Protection: Tanya McCrude



Required by Position	Begin Date	End Date
Extraction General Foreman	Jan 1, 2015	Feb 1, 2019
Operations Staff Member	Apr 15, 2011	Feb 1, 2019

Issues	Action
Training activity updated.	Review changes

Training Activity	Deadline	Completed	Passed	Competency
Fall Protection Training Activity	Jan 2	Apr 10, 2015	✓	Apr 10, 2015 to Oct 9

Close

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

 **RightOnTrack** Home Workers Positions Competencies Training 

Fall Protection Training Activity Details Enroll Settings Revisions

Fall Protection Training Activity

Watch Fall Protection PowerPoint Training and pass field exam.

Revisions to Acknowledge

Date	Revisions
May 12	Updated hearing protection requirements.

[Acknowledge](#)

Instructions

Ensure that you have the proper **PPE** before attempting this training, including:

- a safety harness,
- steel-toed boots,
- a hard hat, and
- coveralls.

www.safety.com

Passing Grade: 85%

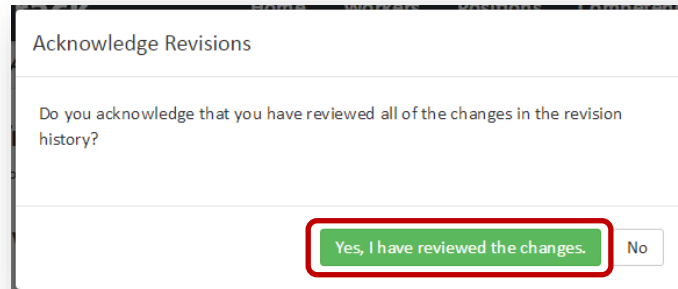
Related Information

[Fall Protection.pptx](#)

Continued on next page....

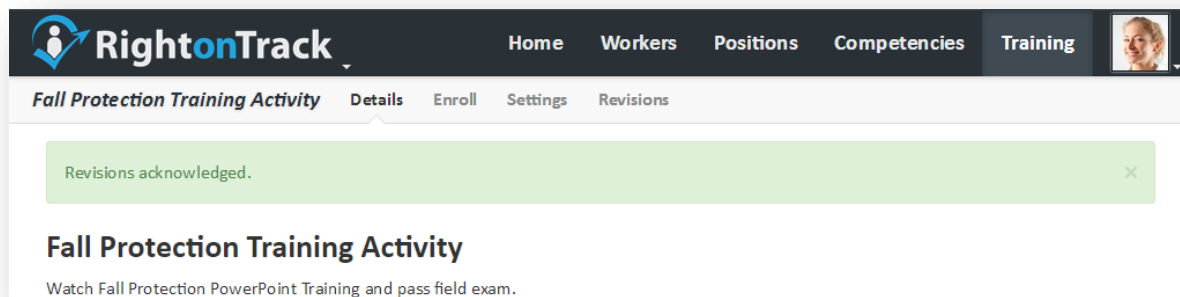
Continued from previous page....

Confirm that you have reviewed the changes.



A dialog box titled "Acknowledge Revisions" with a white background and a thin grey border. It contains the text "Do you acknowledge that you have reviewed all of the changes in the revision history?". At the bottom right, there are two buttons: a green button with white text "Yes, I have reviewed the changes." and a white button with grey text "No". The green button is highlighted with a red rectangular border.

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



A screenshot of the RightOnTrack web application. The top navigation bar is dark blue with the RightOnTrack logo on the left and links for Home, Workers, Positions, Competencies, and Training on the right. A user profile picture is visible in the top right corner. Below the navigation bar, the "Fall Protection Training Activity" page is shown. It has tabs for Details, Enroll, Settings, and Revisions. A green notification banner at the top of the page content area says "Revisions acknowledged." with a close button (X) on the right. Below the banner, the title "Fall Protection Training Activity" is displayed, followed by the instruction "Watch Fall Protection PowerPoint Training and pass field exam."

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.

Demonstrate SOP-0001A in the field.

Are you sure you want to delete this training activity?

Delete

Note: You 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.

Demonstrate SOP-0001A in the field.

This training activity cannot be deleted because it has

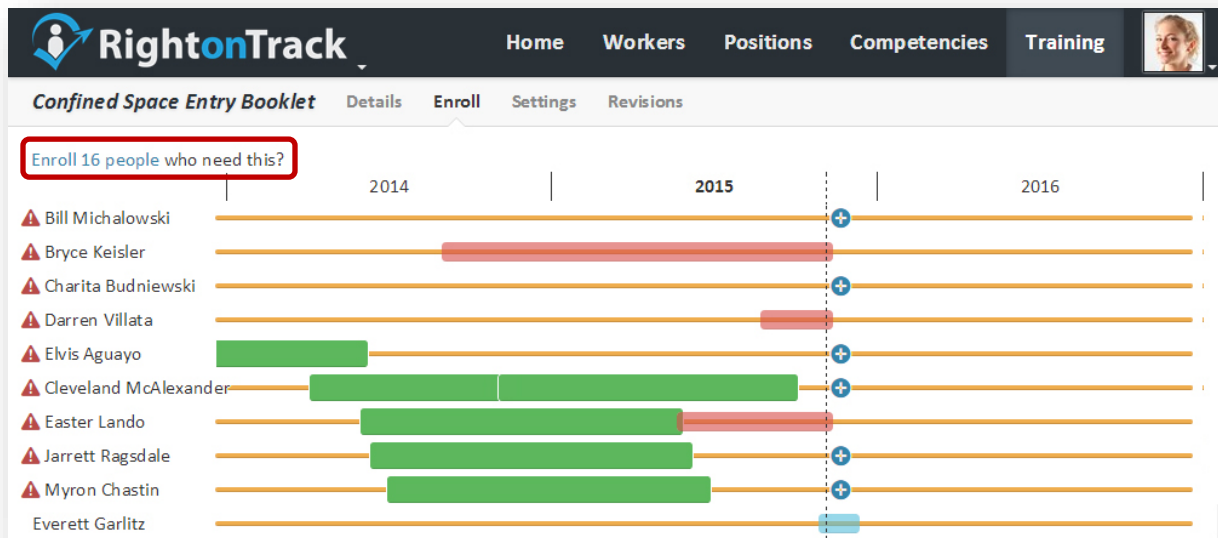
- 0 registrations
- 0 competencies acquired by workers completing it
- 1 attached file
- 1 referenced file

Do you want to archive this training activity instead? Archived training activities cannot be enrolled in.

Archive

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.

Fire Extinguisher Training

Fire Extinguisher Training In The Field

Enroll 3 People:

☒

Boris Parfait, deadline Jul 31

☒

Jarrett Ragsdale, deadline Jul 31

☐

Johnny Lees, deadline Jul 31

☒

Johnny Good, deadline Jul 31

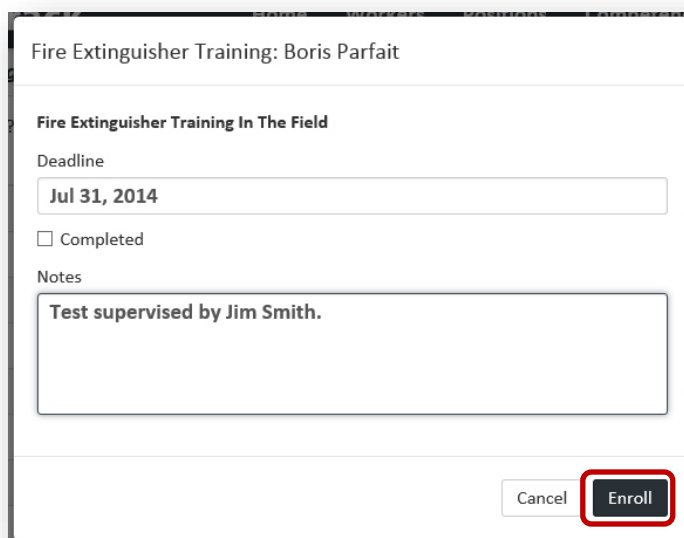
Cancel

Enroll

Continued on next page...

Continued from previous page...

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.



Fire Extinguisher Training: Boris Parfait

Fire Extinguisher Training In The Field

Deadline

Jul 31, 2014

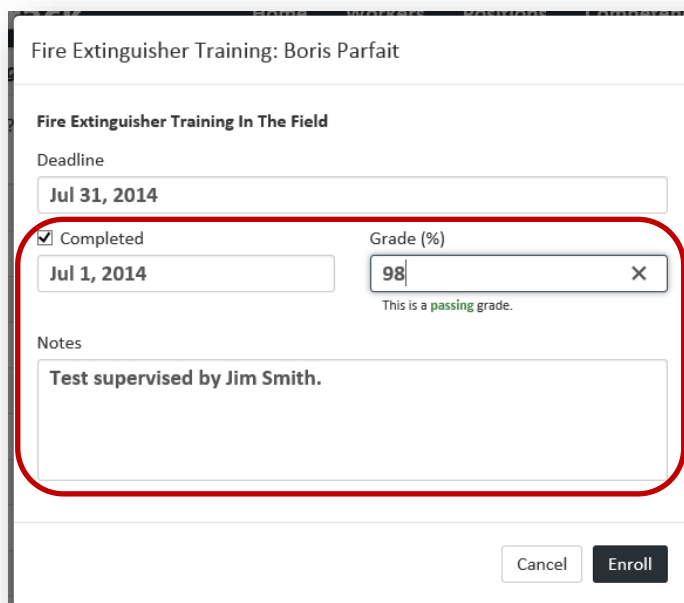
☐ Completed

Notes

Test supervised by Jim Smith.

Cancel Enroll

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.



Fire Extinguisher Training: Boris Parfait

Fire Extinguisher Training In The Field

Deadline

Jul 31, 2014

☒ Completed

Grade (%)

Jul 1, 2014 98 X

This is a passing grade.

Notes

Test supervised by Jim Smith.

Cancel Enroll

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.

A screenshot of the 'New Classroom Course' form. The form has a title 'New Classroom Course'. Below the title, there are two input fields. The first field is labeled 'Classroom Course Name *' and contains the text 'H2S Awareness Classroom Course'. The second field is labeled 'Completes Competency *' and contains the text 'H2S Awareness'. Below these fields, there is a 'Create' button, which is highlighted with a red rectangle.

Edit a Classroom Course

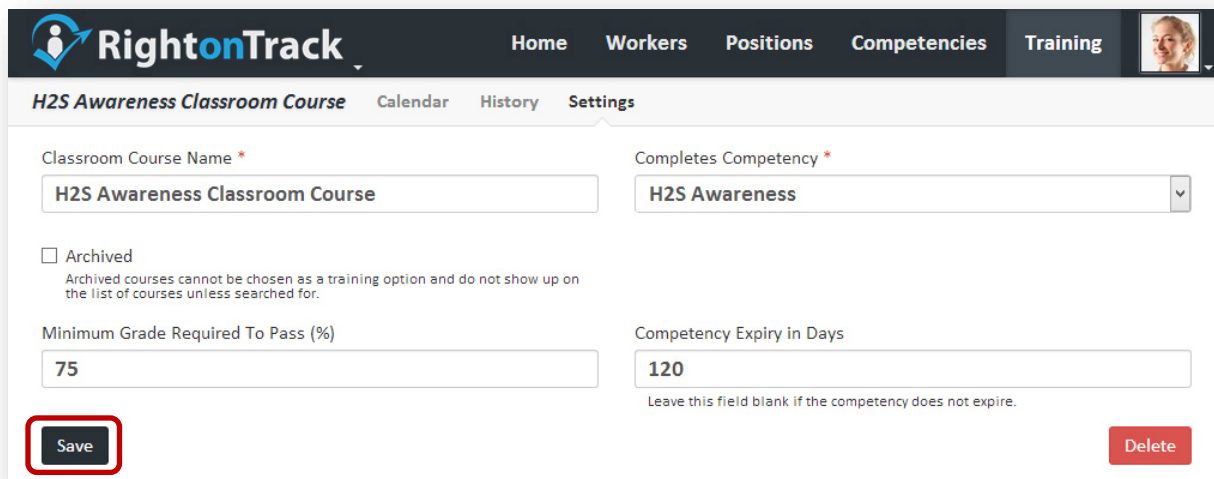
Click on the **"Training"** tab. [Search](#) to find the classroom course you wish to edit, then click on the gear icon (⚙️) beside the title to bring up the **"Settings"** tab for the classroom course.

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.



The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Training' tab is active, and a user profile picture is visible. Below the navigation bar, the 'Settings' tab is selected for the 'H2S Awareness Classroom Course'. The settings form includes the following fields and options:

- Classroom Course Name ***: A text input field containing 'H2S Awareness Classroom Course'.
- Completes Competency ***: A dropdown menu showing 'H2S Awareness'.
- Archived**: A checkbox that is currently unchecked. Below it, a note states: 'Archived courses cannot be chosen as a training option and do not show up on the list of courses unless searched for.'
- Minimum Grade Required To Pass (%)**: A text input field containing '75'.
- Competency Expiry in Days**: A text input field containing '120'. Below this field, a note states: 'Leave this field blank if the competency does not expire.'
- Save**: A button with a red border, located at the bottom left of the form.
- Delete**: A red button located at the bottom right of the form.

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.

H2S Awareness Classroom Course

Are you sure you want to delete this course?

Delete

Note: You 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.

H2S Awareness Classroom Course

This course cannot be deleted because it has

- 8 scheduled courses

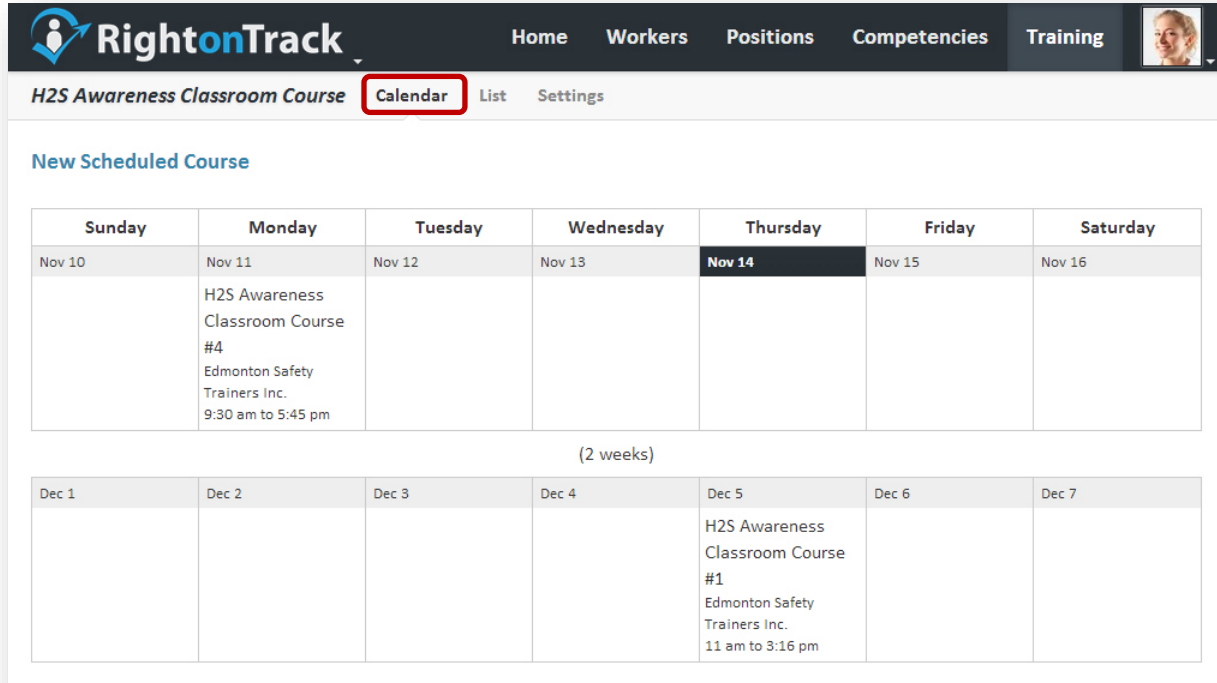
Do you want to archive this course instead? Archived courses can no longer be enrolled in.

Archive

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.



The screenshot shows the RightOnTrack application interface. At the top, there is a navigation bar with the RightOnTrack logo and several tabs: Home, Workers, Positions, Competencies, and Training. The Training tab is selected, and a user profile picture is visible on the right. Below the navigation bar, the breadcrumb trail shows "H2S Awareness Classroom Course" followed by "Calendar", "List", and "Settings". The "Calendar" tab is highlighted with a red box. The main content area is titled "New Scheduled Course" and displays a calendar grid for the next two weeks. The first week shows a course scheduled for Monday, Nov 11, and the second week shows a course scheduled for Thursday, Dec 5. Both courses are titled "H2S Awareness Classroom Course" and are provided by "Edmonton Safety Trainers Inc.".

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 10	Nov 11	Nov 12	Nov 13	Nov 14	Nov 15	Nov 16
	H2S Awareness Classroom Course #4 Edmonton Safety Trainers Inc. 9:30 am to 5:45 pm					
(2 weeks)						
Dec 1	Dec 2	Dec 3	Dec 4	Dec 5	Dec 6	Dec 7
				H2S Awareness Classroom Course #1 Edmonton Safety Trainers Inc. 11 am to 3:16 pm		

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.

RightOnTrack Home Workers Positions Competencies Training

H2S Awareness Classroom Course Calendar **List** Settings

New Scheduled Course

H2S Awareness Classroom Course #9
Jimbo Gassard of Safety Trainers Inc.
Enrolled: 0 (0 confirmed) of 24.

Where	When
Bonnyville Plant	Jan 30, 2014, 9:30 am-9:15 pm

H2S Awareness Classroom Course #8
Bob McPumperson of Industrial Safety Training Inc.
Enrolled: 0 (0 confirmed) of 23.

Where	When
Calgary Office	Dec 11, 3:30 am-8:45 pm

H2S Awareness Classroom Course #6
Bob McDonald of H2S Training Inc.
Enrolled: 3 (1 confirmed) of 30.

Where	When
Spruce Grove Office	Aug 15, 9 am-5 pm
Edmonton Safety Trainers Inc.	Aug 16, 9 am-5 pm
Keyano College	Aug 19, 9 am-5 pm

H2S Awareness Classroom Course #3
John Doe of H2S Training Inc.
Enrolled: 30 (2 confirmed) of 32.

Where	When
Keyano College	Jul 5, 9:30 am-4:30 pm
Keyano College	Jul 11, 10 am-12 pm

H2S Awareness Classroom Course #2
Richard Scott of H2S Training Inc.
Enrolled: 0 (0 confirmed) of 35.


Where	When
Edmonton Safety Trainers Inc.	May 29, 8:30 am-12:30 pm
Ft. Mac Oil Sands	May 31, 10:30 am-2:15 pm

H2S Awareness Classroom Course #1
Peter Davidson of InstructCo
Enrolled: 30 (29 confirmed), but only 25 seats available.


Where	When
Spruce Grove Office	Apr 30, 7:30 am-8 am

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.

 **RightOnTrack**

[Home](#) [Workers](#) [Positions](#) [Competencies](#) [Training](#)



H2S Awareness Classroom Course

[Calendar](#) [List](#) [Settings](#)

New Scheduled Course

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 10	Nov 11	Nov 12	Nov 13	Nov 14	Nov 15	Nov 16
	H2S Awareness Classroom Course #4 Edmonton Safety Trainers Inc. 9:30 am to 5:45 pm					



(2 weeks)

Dec 1	Dec 2	Dec 3	Dec 4	Dec 5	Dec 6	Dec 7
				H2S Awareness Classroom Course #1 Edmonton Safety Trainers Inc. 11 am to 3:16 pm		

Edit a Scheduled Course

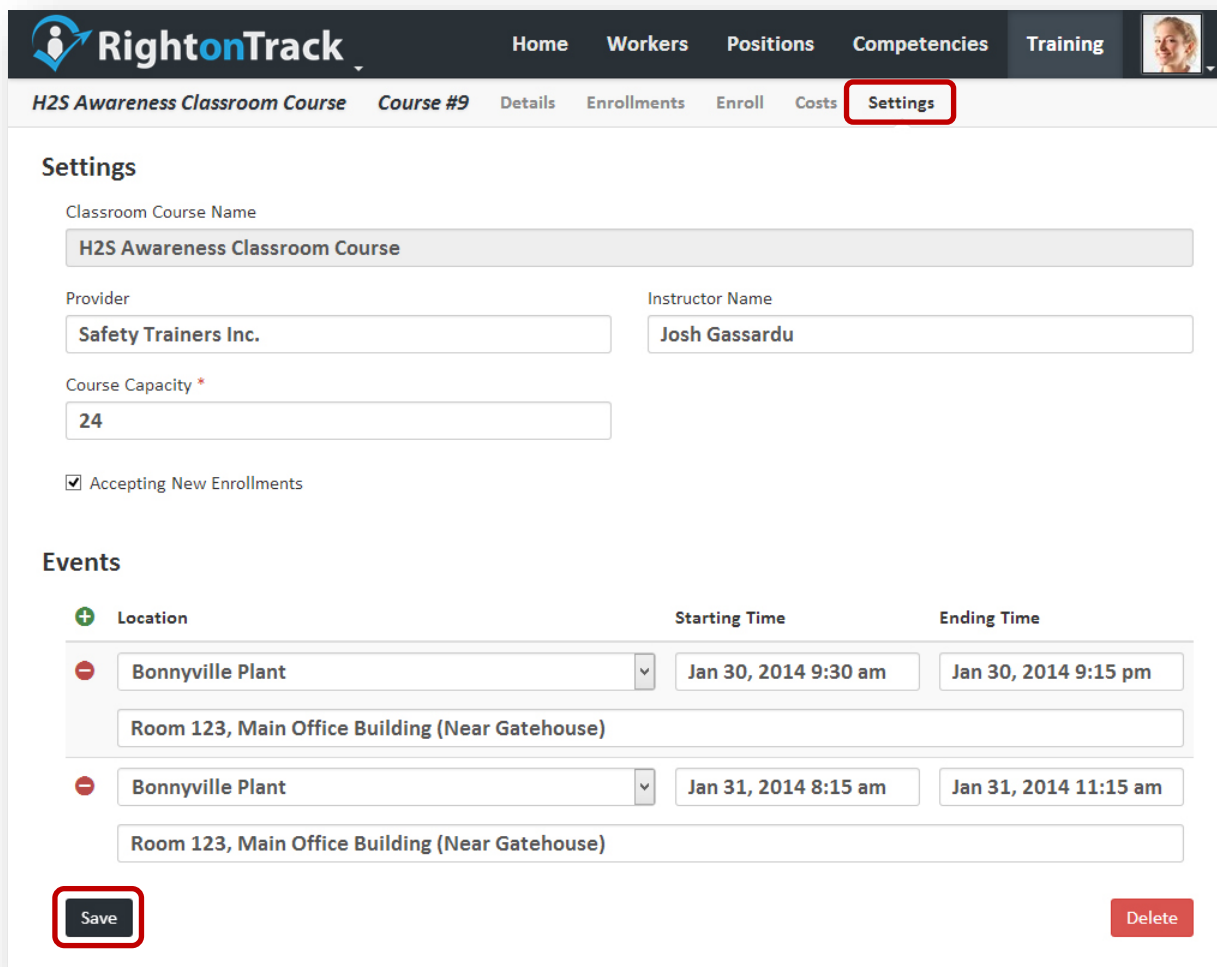
Click on the **"Training"** tab. [Search](#) to find the classroom course, then click on the title to bring up the **"Calendar"** submenu tab for the classroom course. Click on the **"List"** submenu tab to open the list of scheduled courses. Click on the scheduled course title to open the **"Enrollments"**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



The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Training' tab is active, showing a submenu with 'H2S Awareness Classroom Course', 'Course #9', 'Details', 'Enrollments', 'Enroll', 'Costs', and 'Settings'. The 'Settings' tab is selected and highlighted with a red box. The 'Settings' page displays the following information:

- Classroom Course Name:** H2S Awareness Classroom Course
- Provider:** Safety Trainers Inc.
- Instructor Name:** Josh Gassardu
- Course Capacity:** 24
- ☒ Accepting New Enrollments

Events

Location	Starting Time	Ending Time
 Bonnyville Plant Room 123, Main Office Building (Near Gatehouse)	Jan 30, 2014 9:30 am	Jan 30, 2014 9:15 pm
 Bonnyville Plant Room 123, Main Office Building (Near Gatehouse)	Jan 31, 2014 8:15 am	Jan 31, 2014 11:15 am

At the bottom of the page, there is a **Save** button (highlighted with a red box) and a **Delete** button.

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.

The screenshot shows the 'Costs' tab selected in the 'H2S Awareness Classroom Course' interface. A message states: 'There are currently no costs associated with this scheduled course. [Add a new one.](#)' A 'Save' button is highlighted with a red box.

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

The screenshot shows the 'Costs' tab with a table of costs. A 'Save' button is highlighted with a red box.

Description	Quantity	Unit Cost	Total
Instructor Fee	1	350.00	350.00
Equipment Rental Fee	25	3.79	94.75
Instructor Mileage		0.37	0.00
Instructor Per Diem	1	135.00	135.00

Total Cost: \$579.75

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](#).

RightOnTrack Home Workers Positions Competencies Training

First Aid Class Calendar List Settings

New Scheduled Course

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Jun 29	Jun 30	Jul 1	Jul 2	Jul 3	Jul 4	Jul 5
				First Aid Class #6 Edmonton Safety Trainers Inc. 9 am to 11 am First Aid Class #6 Edmonton Safety Trainers Inc. 12 pm to 5 pm		
(2 weeks)						
Jul 27	Jul 28	Jul 29	Jul 30	Jul 31	Aug 1	Aug 2
	First Aid Class #9 Keyano College 5 am to 8:30 pm	First Aid Class #9 Keyano College 5 am to 8:30 am				

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

RightOnTrack Home Workers Positions Competencies Training

Confined Space Entry Booklet Details **Enroll** Settings Revisions

Enroll 16 people who need this?

Worker	2014	2015	2016
Bill Michalowski			+
Bryce Keisler			
Charita Budniewski			+
Darren Villata			
Elvis Aguayo			+
Cleveland McAlexander			+
Easter Lando			
Jarrett Ragsdale			+
Myron Chastin			+
Everett Garlitz			

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.

Continued on next page...

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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.

First Aid

First Aid Class #9, Aug 30
By Jimmy Chu of St. John's Ambulance (Edmonton)

Where	When
Edmonton Safety Trainers Inc. Room 112	Aug 30, 10 am - 1:15 pm
Edmonton Safety Trainers Inc. Room 112	Aug 30, 1 pm - 6 pm

Edmonton Safety Trainers Inc.
11111 100 st.
Edmonton, Alberta, Canada

8 of 20 Seats Remaining

Enroll 2 People:

- ☒ Nigel Kepley - Incomplete
- ☒ Will Lacey - Expired Nov 26, 2012
- ☐ Scott Gladden - Expires Aug 19

Cancel **Enroll**

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.

First Aid: Scott Gladden

First Aid Class #9, Aug 30
By Jimmy Chu of St. John's Ambulance (Edmonton)

Where	When
Edmonton Safety Trainers Inc. Room 112	Aug 30, 10 am - 1:15 pm
Edmonton Safety Trainers Inc. Room 112	Aug 30, 1 pm - 6 pm

Edmonton Safety Trainers Inc.
11111 100 st.
Edmonton, Alberta, Canada

8 of 20 Seats Remaining

☒ Confirmed

Cancel **Enroll**

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.

The screenshot shows the 'Enrollments' page for the 'H2S Awareness Classroom Course' (Course #9). The page has a top navigation bar with 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. Below this is a sub-navigation bar with 'Details', 'Enrollments' (highlighted with a red box), 'Enroll', 'Costs', and 'Settings'. The main content area shows course details: Capacity: 24, Confirmed: 4/6, and a link to 'Confirm 2 people?'. A search bar is on the right. Below this are six worker cards, each with a name, a 'Confirmed' checkbox (checked for Cleveland McAlexander, Joe Test, Nilda Stark, and Roman Penniman), a 'Completed' checkbox, and a profile picture. A 'Save' button is at the bottom left, highlighted with a red box.

Worker Name	Confirmed	Completed
Cleveland McAlexander	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Joe Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Nilda Stark	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rivka Salvatore	<input type="checkbox"/>	<input type="checkbox"/>
Roland Schneiders	<input type="checkbox"/>	<input type="checkbox"/>
Roman Penniman	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

The screenshot shows the 'Enrollments' page for the 'H2S Awareness Classroom Course' (Course #9). The page has a top navigation bar with 'Home', 'Workers', 'Positions', 'Competencies', and 'Training' (selected). Below the navigation bar, there are tabs for 'Details', 'Enrollments' (selected), 'Enroll', 'Costs', and 'Settings'. The page displays a list of workers with their status and a 'Save' button at the bottom left.

Worker Name	Confirmed	Completed	Score
Cleveland McAlexander	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Joe Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	85 %
Nilda Stark	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Rivka Salvatore	<input type="checkbox"/>	<input type="checkbox"/>	
Roland Schneiders	<input type="checkbox"/>	<input type="checkbox"/>	
Roman Penniman	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Capacity: 24
Confirmed: 4/6 Confirm 2 people?

search [Q]

Save

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.

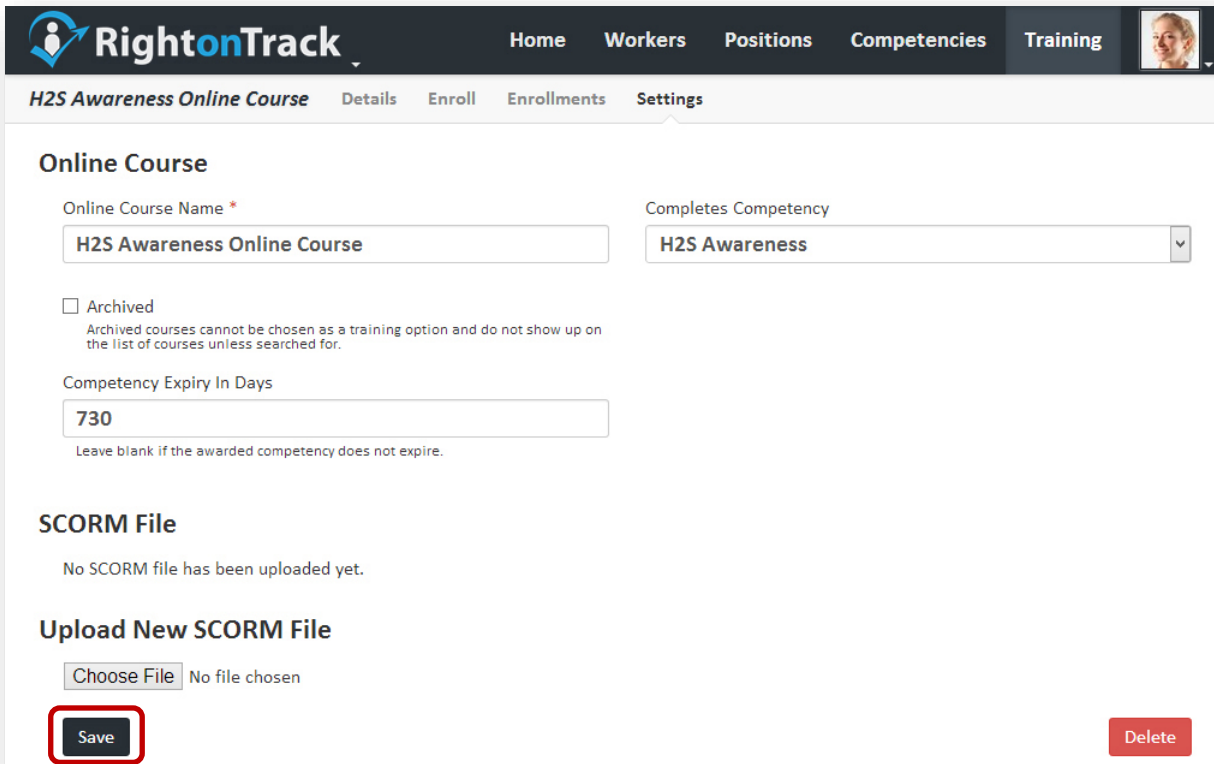
A screenshot of the 'New Online Course' form. The form has a title 'New Online Course'. Below the title, there is a 'Course Name' field with a red asterisk indicating it is required. The text 'H2S Awareness Online Course' is entered in this field. Below the course name field, there is a 'Completes Competency' dropdown menu. The dropdown is open, showing 'H2S Awareness' as the selected option. At the bottom left of the form, there is a 'Create' button, which is highlighted with a red rectangle.

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.



The screenshot shows the 'Settings' page for the 'H2S Awareness Online Course' in the RightOnTrack system. The page has a dark header with the RightOnTrack logo and navigation tabs: Home, Workers, Positions, Competencies, and Training. Below the header, there's a sub-header with tabs: Details, Enroll, Enrollments, and Settings. The main content area is titled 'Online Course' and contains several form fields: 'Online Course Name' (set to 'H2S Awareness Online Course'), 'Completes Competency' (set to 'H2S Awareness'), an 'Archived' checkbox (unchecked), and 'Competency Expiry In Days' (set to '730'). Below these is a 'SCORM File' section with a message 'No SCORM file has been uploaded yet.' and an 'Upload New SCORM File' section with a 'Choose File' button and the text 'No file chosen'. At the bottom, there are two buttons: 'Save' (highlighted with a red box) and 'Delete'.

RightOnTrack Home Workers Positions Competencies Training

H2S Awareness Online Course Details Enroll Enrollments Settings

Online Course

Online Course Name * H2S Awareness Online Course

Completes Competency H2S Awareness

☐ Archived
Archived courses cannot be chosen as a training option and do not show up on the list of courses unless searched for.

Competency Expiry In Days
730
Leave blank if the awarded competency does not expire.

SCORM File

No SCORM file has been uploaded yet.

Upload New SCORM File

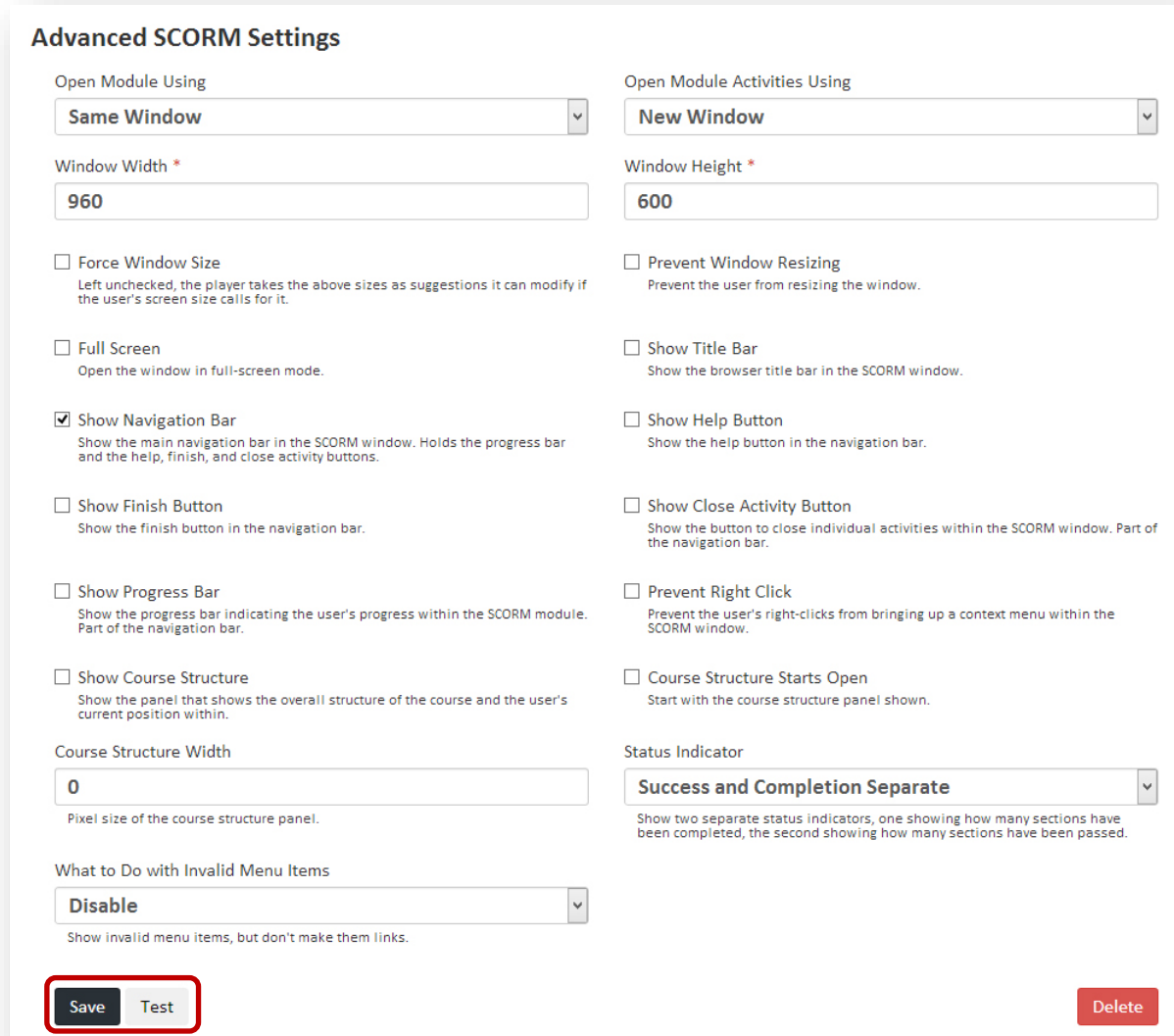
Choose File No file chosen

Save Delete

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.



Advanced SCORM Settings

Open Module Using
Same Window

Open Module Activities Using
New Window

Window Width *
960

Window Height *
600

☐ Force Window Size
Left unchecked, the player takes the above sizes as suggestions it can modify if the user's screen size calls for it.

☐ Prevent Window Resizing
Prevent the user from resizing the window.

☐ Full Screen
Open the window in full-screen mode.

☐ Show Title Bar
Show the browser title bar in the SCORM window.

☒ Show Navigation Bar
Show the main navigation bar in the SCORM window. Holds the progress bar and the help, finish, and close activity buttons.

☐ Show Help Button
Show the help button in the navigation bar.

☐ Show Finish Button
Show the finish button in the navigation bar.

☐ Show Close Activity Button
Show the button to close individual activities within the SCORM window. Part of the navigation bar.

☐ Show Progress Bar
Show the progress bar indicating the user's progress within the SCORM module. Part of the navigation bar.

☐ Prevent Right Click
Prevent the user's right-clicks from bringing up a context menu within the SCORM window.

☐ Show Course Structure
Show the panel that shows the overall structure of the course and the user's current position within.

☐ Course Structure Starts Open
Start with the course structure panel shown.

Course Structure Width
0
Pixel size of the course structure panel.

Status Indicator
Success and Completion Separate
Show two separate status indicators, one showing how many sections have been completed, the second showing how many sections have been passed.

What to Do with Invalid Menu Items
Disable
Show invalid menu items, but don't make them links.

Save Test Delete

Test an Online Course

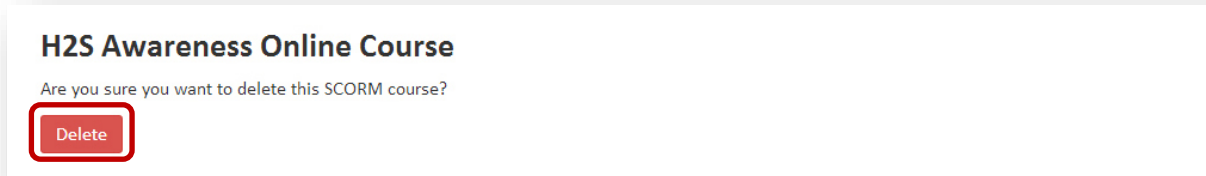
After upload a SCORM file, you can click on the "Test" button to make sure the SCORM file runs as expected.

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

Delete or Archive an Online Course

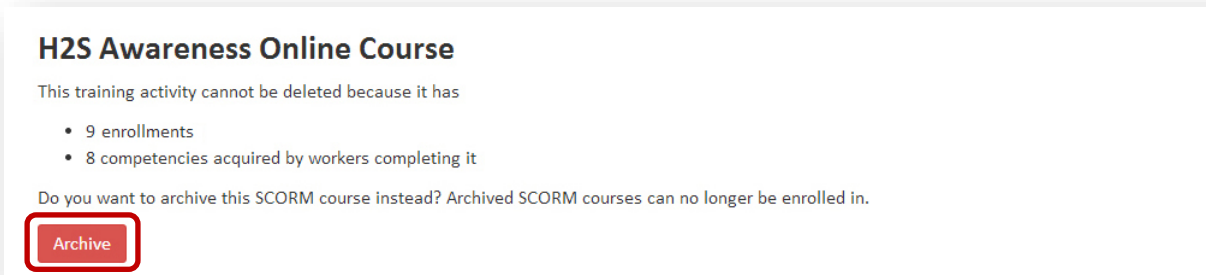
Click on the **"Training"** tab. [Search](#) to find the online course you wish to delete, then click on the gear icon (⚙️) beside the title to bring up the **"Settings"** tab for the online course.

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 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.

The screenshot shows the 'RightOnTrack' application interface. The top navigation bar includes 'Home', 'Workers', 'Positions', 'Competencies', and 'Training'. The 'Training' tab is active, showing a submenu with 'Details', 'Enroll', 'Settings', and 'Revisions'. The 'Enroll' tab is selected, displaying a list of workers and their enrollment status for the 'Confined Space Entry Booklet' course. A red box highlights the link 'Enroll 16 people who need this?'. The workers listed are: Bill Michalowski, Bryce Keisler, Charita Budniewski, Darren Villata, Elvis Aguayo, Cleveland McAlexander, Easter Lando, Jarrett Ragsdale, Myron Chastin, and Everett Garlitz. Each worker has a horizontal bar indicating their enrollment status, with a '+' icon next to the bar.

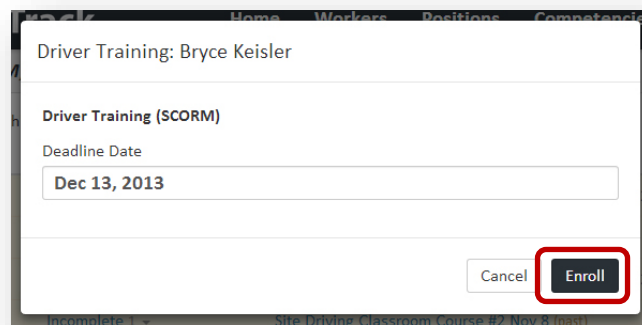
To enroll multiple workers in a training activity, click on the **"Enroll # people who need this?"** link. Select or deselect workers to choose who should be enrolled in the training activity. The deadline will default to one month or the previous expiry date, whichever is sooner. Press the **"Enroll"**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

The screenshot shows a modal window titled 'Driver Training'. It displays the course name 'Driver Training (SCORM)' and the number of people to be enrolled: 'Enroll 5 People:'. Below this, a list of workers is shown with checkboxes and their respective deadlines: Bill Michalowski (Dec 13), Bryce Keisler (Dec 13), Chang Wu (Dec 13), Yasmin Caplinger (Dec 13), and Zaida Sheehy (Dec 13). At the bottom right, there are 'Cancel' and 'Enroll' buttons. The 'Enroll' button is highlighted with a red box.

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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.



Driver Training: Bryce Keisler

Driver Training (SCORM)

Deadline Date

Dec 13, 2013

Cancel Enroll

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.

RightOnTrack Home Workers Positions Competencies Training

Golf Training (SCORM) Details Enroll **Enrollments** Settings

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)

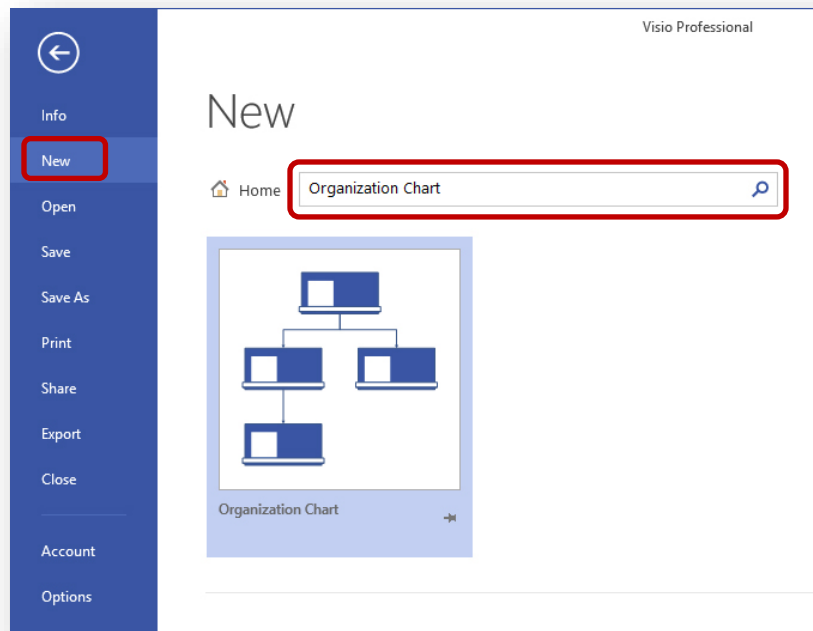
Name	Last Activity	Completed	Satisfied	Score	Time
Adrian Barnes	Oct 24 4:08 pm	✓	✓	100%	33s
Adrian Barnes	Nov 12 5:42 pm				
Alex Dube	Aug 8 11:26 am				
Chang Wu					
Tanya McCrude	Jul 3 11:10 am	✓	✓	75%	4m 11s
Tanya McCrude	Jul 3 2:57 pm	✓	✓	100%	32s

Use Microsoft Visio to Generate a Printable Organization Chart

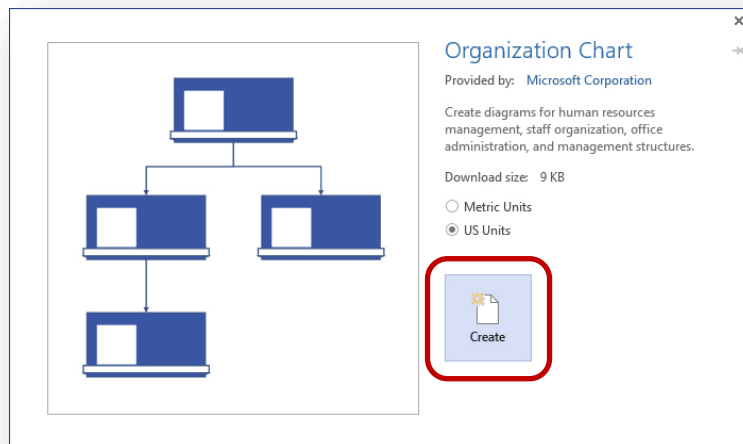
Note: You must have Microsoft Visio 2013 installed in order to follow these instructions.

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.



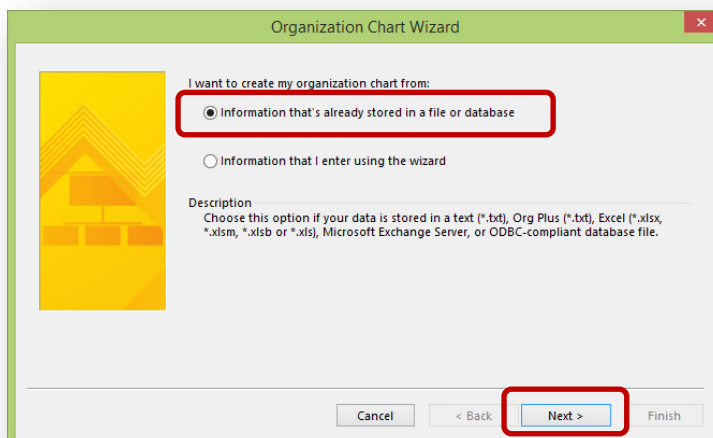
- 3) Choose "**Create**".



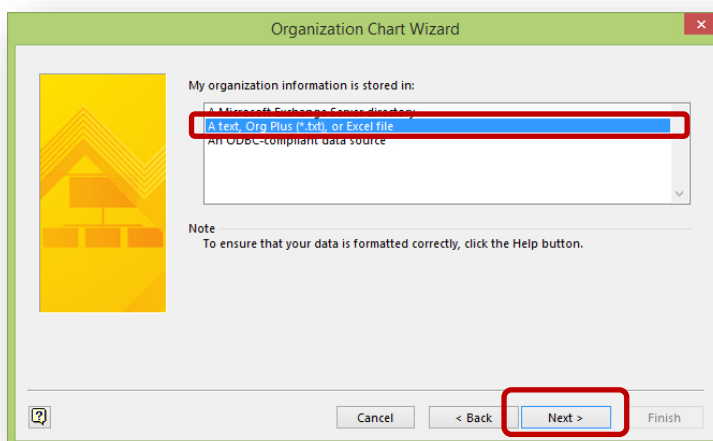
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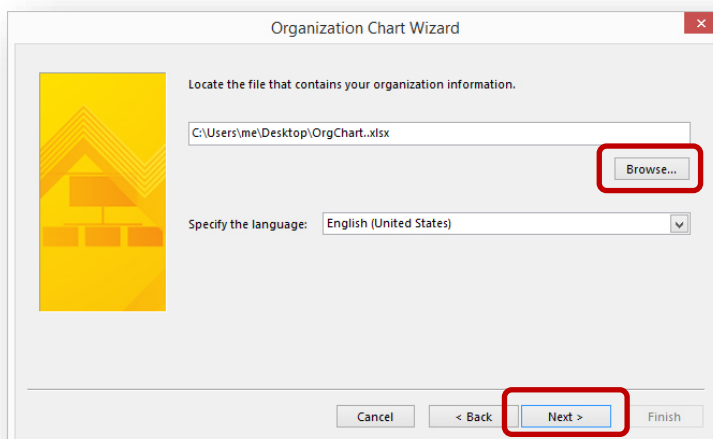
4) Choose "Information that's already stored in a file or database" and press **"Next >"**.



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



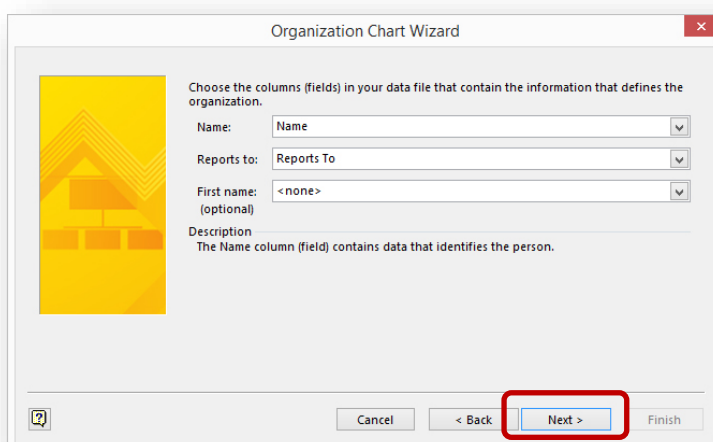
6) Browse to select the report which you created in Step 1 and press **"Next >"**.



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

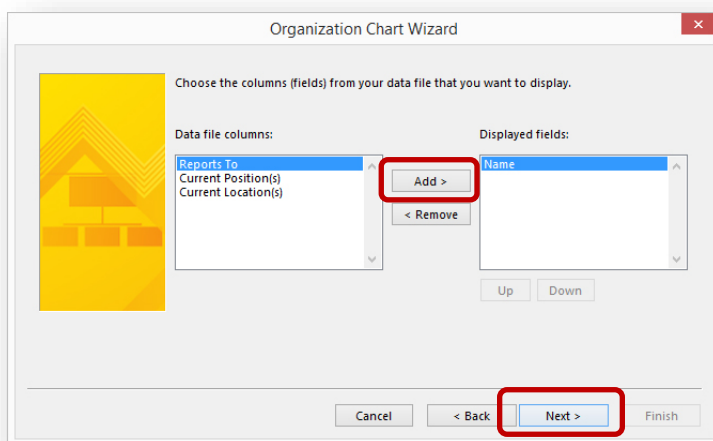


The screenshot shows the 'Organization Chart Wizard' dialog box. On the left is a yellow icon of an organization chart. The main area contains the following fields:

- Name:** A dropdown menu with 'Name' selected.
- Reports to:** A dropdown menu with 'Reports To' selected.
- First name (optional):** A dropdown menu with '<none>' selected.
- Description:** A text area containing the text 'The Name column (field) contains data that identifies the person.'

At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a red rectangle.

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.



The screenshot shows the 'Organization Chart Wizard' dialog box. On the left is a yellow icon of an organization chart. The main area contains the following fields:

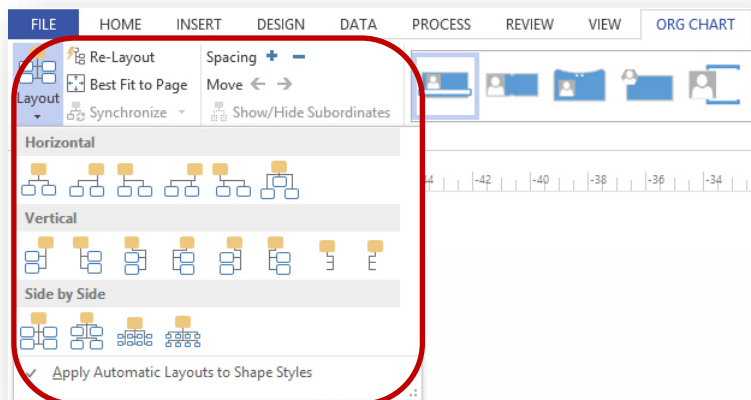
- Data file columns:** A list box containing 'Reports To', 'Current Position(s)', and 'Current Location(s)'. The 'Add >' button is highlighted with a red rectangle.
- Displayed fields:** A list box containing 'Name'. The 'Up' and 'Down' buttons are visible below the list box.

At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a red rectangle.

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

[illegible]