complyND✓

Training Management User Guide
For Supervisors

University of Notre Dame
April 2015

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About This Guide

Preface

The user guide provides information on using the Training Management module of the complyND web-based application.

Target Audience

This guide is intended for supervisors who will be both assigning and completing training in the Training Management module of complyND.

Chapter Summaries

This guide consists of the following chapters.

Chapter Title	Description
Overview	Provides an overview on the Training Management module of complyND.
Common Functions	Provides information on the common functions of the Training Management module of complyND's features.
Assigning Trainings	Provides information on assigning the courses to the trainees using curriculum or ad-hoc setup.
Completing Training Courses	Provides information on completing the courses, providing course completion feedback, and responding to course test questionnaires
Reports	Provides information on the various reports used in the Training Management module of complyND.
Dashboards	Provides information on the various charts used in the Training Management module of complyND.

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Overview

1

This chapter provides an overview on the Training Management module of complyND. The complyND system allows for the completion and tracking of compliance training. As a supervisor, you will be responsible for ensuring your employees take all of the training courses required for their job. This means that you will need to assign your directed and dotted-line reports to the appropriate courses.

Training Assignments Setup

The following figure depicts the **Training Management** assignment setup workflow:

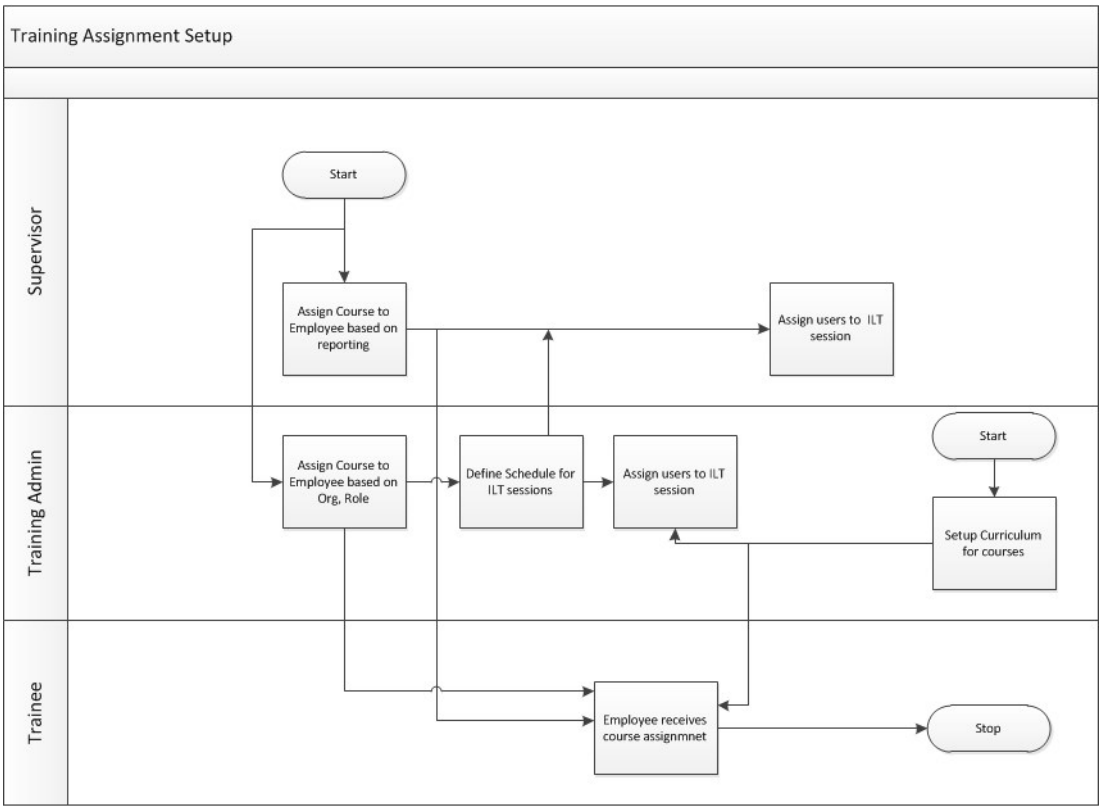

Figure 1: Training Assignments Setup Workflow

The Training Management Setup involves:

- **Create Ad-Hoc Course**: You can schedule ad-hoc course. The training administrator and the supervisor can set up the ad-hoc courses for specific users. Based on the validity, the courses can be re-assigned to the trainees to complete for recertification.
- **Setup Instructor-led training**: The Training Admin/Supervisor can assign trainees to an instructor-led training by selecting appropriate sessions.

Training Completion and Certification

You will also be required to complete courses in the system to maintain your own training compliance. The following figure depicts the **Training Completion and Certification** workflow:

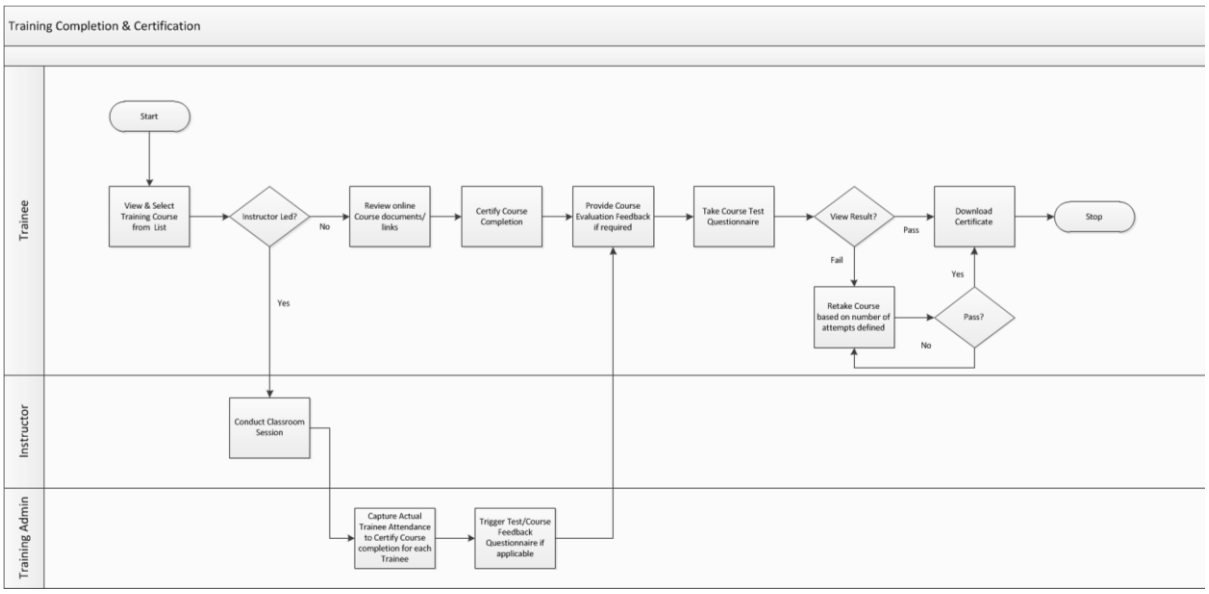

Figure 2: Training Completion and Certification Workflow

The Training Completion and Certification allows users to:

- View and select training course from the list
- Review online course documents/links
- Certify course completion
- Provide course evaluation feedback
- Take course test questionnaire
- Retake course based on number of attempts defined
- Download certificate

Supervisor

Supervisor tab to set up the Training Management contents such as Ad-Hoc Course Setup and Instructor-led Training. You can use this tab to view various set-up related reports and dashboards.

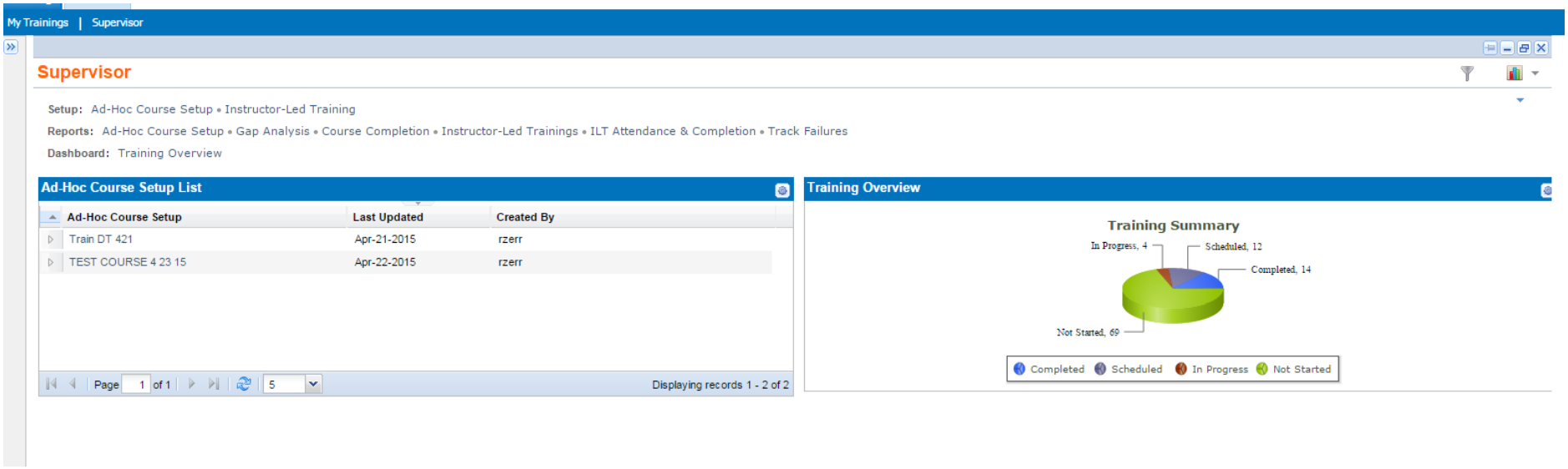

Figure 4: Supervisor tab

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Common Functions 2

This chapter provides information on the common functions and features of the Training Management module of the complyND.

Accessing Assignments through My Tasks Menu

To access the required Training Management content for review:

Step 1 Click the My Tasks menu at the top of the Training Management application home page.

A list of assignments appears.

NOTE: In the Training Management module of complyND applications, in addition to accessing event assignments through **My Tasks** menu, you can also access them from the assigned tabs.

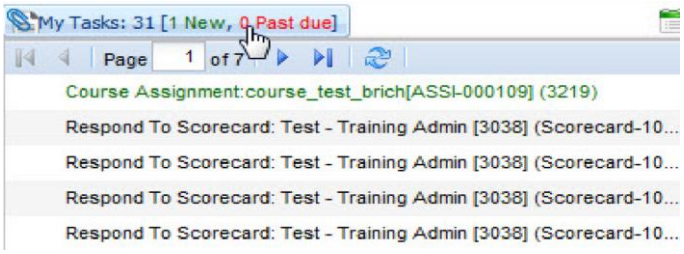


Figure 5: My Tasks Menu

An event assignment may appear as:

- New assignments (links appear in **green**)
- Assignments that are older than five days (links appear in **black**)
- Assignments that are past due (links appear in **red**)

Step 2 Click the required assignment link. The relevant form appears. You can review the content, as applicable, and submit the form.

My Tasks Menu Features

The following table describes the options available in the **My Tasks** menu:

Click the Icon	To . . .
	Navigate to the next page. **NOTE:** If you navigate to the last page, this icon is disabled.
	Navigate to the last page. **NOTE:** If you navigate to the last page, this icon is disabled.
	Navigate to the previous page. **NOTE:** If you navigate to the first page, this icon is disabled.
	Navigate to the first page. **NOTE:** If you navigate to the first page, this icon is disabled.
	Refresh the page and see the latest assignments. **NOTE:** To see the latest data, refresh the **My Tasks** menu periodically.

Form Toolbar

The forms available in the Training Management module of complyND include a common toolbar which consists of a set of icons to perform certain actions. The table below provides a list of toolbar icons and their descriptions.

NOTE: These are the standard form toolbar icons available across all complyND forms. However, every icon may not be available in all the forms. The display of these icons is customized based on the function and usage of the form.

Icon	Click the Icon to . . .
Submit	Submit the contents of the form and route to the next workflow step based on the action selected.
Save Draft	Save the contents of the form as a working draft for the user without processing it to the next workflow step and keep the form open.

Save Draft & Close	Save the contents of the form as a working draft for the user without processing it to the next workflow step and close the form. **NOTE:** You can access the form from **My Tasks** at a later time and continue working.
Cancel	Discard changes made to the form and close it.

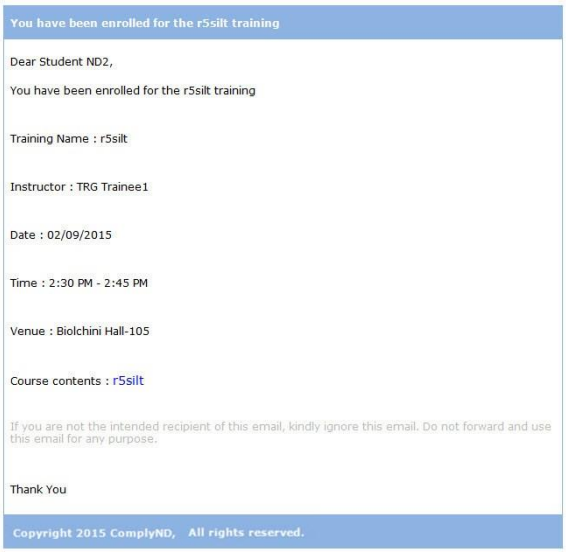
Mandatory Fields

While working on the Training Management forms, you will see certain fields marked with a red asterisk *. The red asterisk indicates that the field requires a mandatory input. If you click the **Submit** icon without providing input in all of the mandatory fields, the application displays an alert message at the top of the form. To submit the form, you must fill in the mandatory fields.

Figure 6: Sample Mandatory Field

E-Mail Notifications

The following table lists the e-mail notifications that are triggered in the Training Management module of complyND.

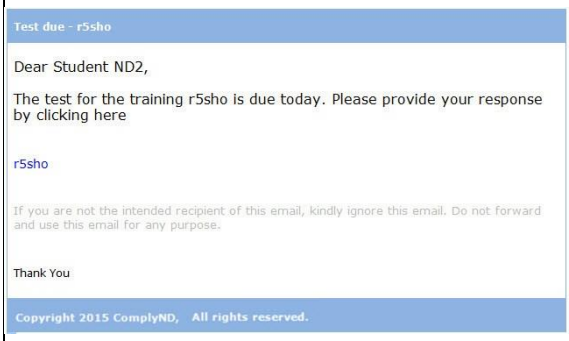
To	Content	Sent When the . . .
Trainees	Subject: You have been enrolled for the <Course Name> training Dear <User Full Name>, You have been enrolled for the <Course Name> training Training Name : <Course Name> Instructor : <Instructor Name> Date : <date> Time : <time> Venue : <location> Course content : <link to the course content> Thank You  You have been enrolled for the r5silt training Dear Student ND2, You have been enrolled for the r5silt training Training Name : r5silt Instructor : TRG Trainee1 Date : 02/09/2015 Time : 2:30 PM - 2:45 PM Venue : Biolchini Hall-105 Course contents : r5silt If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	Instructor-led training courses are part of curriculums or ad-hoc courses that have been published.

To	Content	Sent When the . . .
Trainees	Subject: You have been enrolled for the <Course Name> training Dear <User Full Name>, You have been enrolled for the <Course Name> training. Training Name : <Course Name> Start Date : <date> Due By: <date> Course contents : <link to the course content> Thank You **You have been enrolled for the r5smbt training** Dear Student ND2, You have been enrolled for the r5smbt training. Training Name : r5smbt Start Date : 09-FEB-15 Due Date : 09-FEB-15 Course contents : r5smbt If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	Media based, hands-on, and self-paced trainings are part of curriculums or adHoc courses that have been published.

Trainees	Subject: Reminder: Your training on <Course Name> Dear <User Full Name>, This is a reminder that you have been enrolled in the following training: Training Name : <Course Name> Start Date : <date> Due By : <date> Course contents : <link to the course assignment> Thank You  Reminder: Your training on Course MB Dear Student ND1, This is a reminder that you have been enrolled in the following training: Training Name : Course MB Start Date : 11-FEB-15 Due Date : 12-FEB-15 Course contents : Course MB If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	Media-based, hands-on, and self-paced trainings are due to be completed.

To	Content	Sent When the . . .
Trainees	Subject: Reminder: Your training on <Course Name> starts at <date><time> Dear <User Full Name>, This is to remind you that your training course <Course Name> starts on <date><time>. Please discuss with your supervisor if you can no longer attend. Training Name : <Course Name> Instructor : <Instructor Name> Date : <date> Time : <time> Venue : <location> Course contents : <link to the course assignment> Thank You **Reminder: Your training on test-course-ILT starts at 02/10/2015 7:00 AM** Dear Student ND3, This is to remind you that your training test-course-ILT starts on 02/10/2015 7:00 AM . Please discuss with your supervisor if you can no longer attend. Training Name : test-course-ILT Instructor : Faculty ND1 Date : 02/10/2015 Time : 7:00 AM - 9:00 AM Venue : Coleman/Morse Center-Room 107 Course contents : test-course-ILT If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You **Copyright 2015 ComplyND, All rights reserved.**	Instructor-led trainings are due to be completed.

To	Content	Sent When the . . .
Trainees	Subject: Overdue Reminder: Your Training <Course Name> is overdue Dear <User Full Name>, This message is to notify you that completion of the training course "<Course Name>">" is overdue. Your immediate attention is requested. Due Date : <date> Course contents: <link to the course assignment> Thank You Overdue Reminder: Your training spr2san is overdue Dear Student ND1, This message is to notify you that completion of the training course spr2san is overdue. Your immediate attention is requested. Training Name : spr2san Start Date : 10-FEB-15 Due Date : 10-FEB-15 Course contents : spr2san If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	Media-based, hands-on, and self-paced trainings are overdue and to be completed.
Supervisor (Dotted-Line and Direct)	Subject: Overdue for the <Course Name> training - <Trainee Name> Dear <User Full Name>, This message is to notify you that <Trainee Name> is overdue for completion of the training course <Course Name> Due Date : <date> Training Dashboard: <link to supervisor gap report> Thank You	Media-based, hands-on, and self-paced trainings are overdue and to be completed.

To	Content	Sent When the . . .
Trainee	Subject: Test due - <Course Name> Dear <User Full Name>, The test for the training <Course Name> is due today. Please provide your response by clicking here <link to the test survey name>. Thank You  Test due - r5sho Dear Student ND2, The test for the training r5sho is due today. Please provide your response by clicking here r5sho If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	Course assignment is submitted that has a test questionnaire associated with it.
Trainee	Subject: You have Passed/Failed the <Course Name> training Dear <User Full Name>, You have successfully / not successfully completed the test for <Course Name>. <link to the test survey name>. Thank You  You have Passed the r5sho training Dear Student ND2, You have successfully completed the test for r5sho. If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	

To	Content	Sent When the . . .
Trainee	Subject: You must re-certify for the <Course Name> training Dear <User Full Name>, You must complete the following training course to achieve recertification. Training Name : <Course Name> Start Date : <date> Due By : <date> Course contents : <link to the course assignment> Thank You	Course certification has expired.
Trainee	Subject: You must reappear for the <Course Name> training Dear <User Full Name>, You must complete the following training course to achieve certification. Remaining Retakes(Including current attempt): 1 Training Name : <Course Name> Start Date : <date> Due By : <date> Course contents : <link to the course assignment> Thank You **You must reappear for the reappear training** Dear Student ND1, You must complete the following training course to achieve certification. Remaining Retakes(Including current attempt): 2 Training Name : reappear Start Date : 19-JAN-15 Due By : 19-JAN-15 Course contents : reappear If you are not the intended recipient of this email, kindly ignore this email. Do not forward and use this email for any purpose. Thank You Copyright 2015 ComplyND, All rights reserved.	Trainee has failed the test questionnaire associated with the course and the pass criteria is not satisfied.

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Assigning Trainings 3

This chapter provides information on how to assign curriculums, ad-hoc courses and schedule instructor-led courses.

Sections of this chapter:

1. Creating Ad-Hoc Course
2. Setup Instructor-Led Trainings

Creating Ad-Hoc Course

The Training Administrator and the Supervisor can set up Ad-Hoc courses by using the **Ad-Hoc Course** form.

- Training Administrator has to select the organization and their respective trainees.
- Supervisor selects the trainee with whom they have a direct or dotted-line relationship.

Navigation

To access the **Ad-Hoc** form, perform the following steps:

Step 1 Navigate to the **Supervisor** form to add the courses.

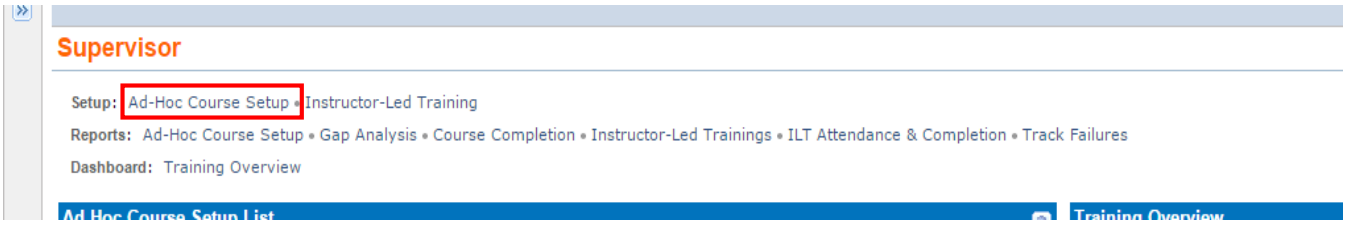


Figure 7: Accessing Ad-Hoc Setup form

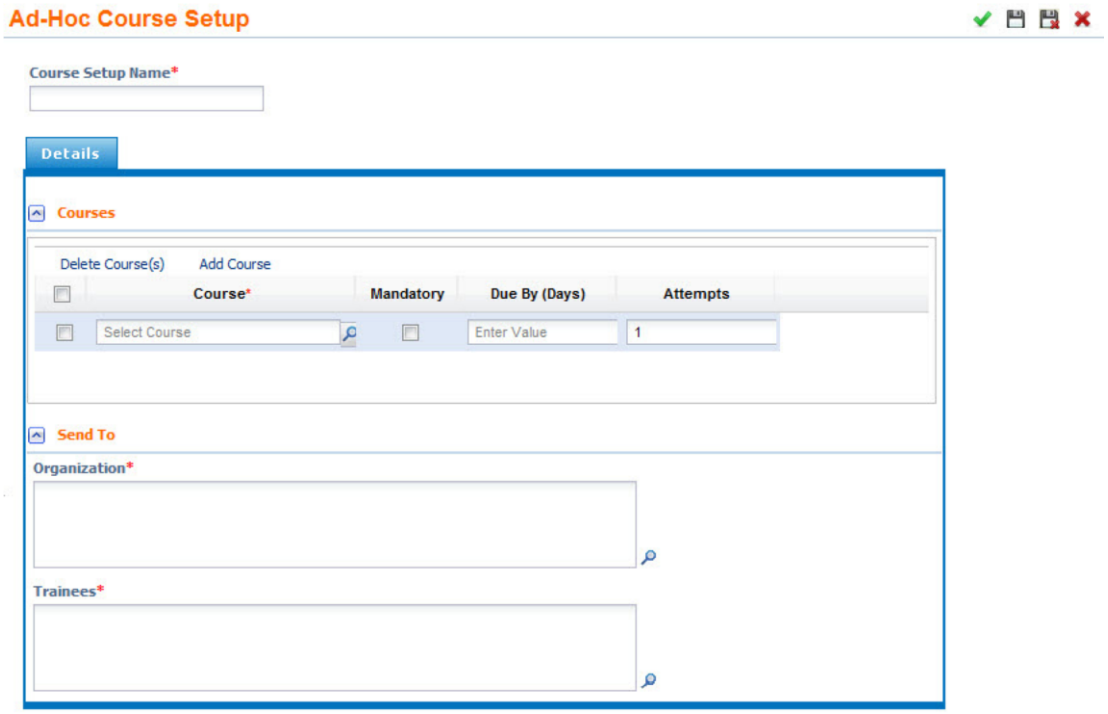


Figure 8: Ad-Hoc Course Setup Form

Ad-Hoc Course Setup Form > Header Section

Use the header section to provide the basic information of the Ad-Hoc course setup.

Figure 9: Curriculum Form > Header Section

Field/List Name	Description
Course Setup Name	Type the name of the course. You **cannot** modify the course name after the course is published. **NOTE:** You must enter a unique name in this field. **NOTE:** After entering the course name, if you click anywhere outside the field, the course name appears in the form title.

Ad-Hoc Course Setup Form > Details Tab

Use the **Details tab** to add courses and trainee details.

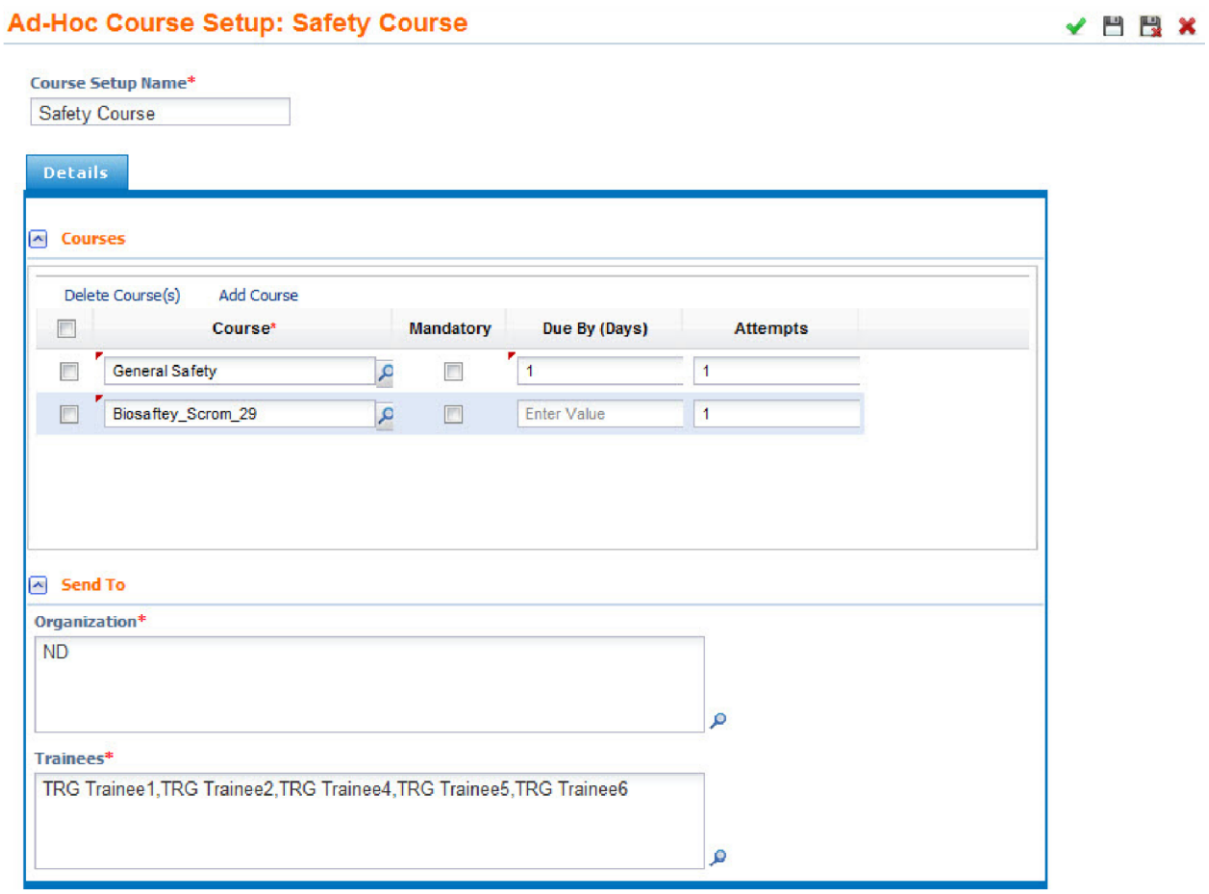


Figure 10: Ad-Hoc Course Setup Form > Details Tab

Courses Use this section to add courses for the curriculum.	
Add Courses Tabular Format The **Add Courses** section is designed in a tabular format. You can add multiple course details. If you have selected the **Allow Courses only by Sequence** check box, add courses in the sequential order in which the trainees must take the courses. If you do not check this box you can add the courses randomly.	
Field/List Name	**Description**
Add Course button	To add courses, click this button. The course-related fields appear in the tabular format. To add additional courses, click this button as many times as required.
Course	Select the course that you want to add.
Mandatory check box	Select this check box to make the course mandatory. Clear this check box to mark the course as non-mandatory.

Due By (Days)	Type the number of days by which the course is due. This is a numeric-entry field. You can type any positive integer. The due date is calculated based on the course assignment. Example: Due By (Days) = 6 Course assignment date = March 11, 2014 Due date = March 17, 2014
Attempts	Type the number of times the user can retake the course.
Send To Use this section to select the organization and trainees for the course.	
Organization (appears only when you log in as Training Administrator role)	Select one or more organizations.
Trainees	Select one or more trainee(s).

Form Submission

To take action on the current form, click the **Submit** icon.

Scheduling Instructor-Led Trainings

Using the **Instructor-Led Training Schedule** form, you can assign participants to sessions of an ILT course. After the instructor-led training sessions for a particular course are published, the course assignments are generated to the trainees and made available in the **My Trainings** report. The course assignment status is updated to **Scheduled** based on the start and end time that you specify in this form.

Navigation

To access the **Instructor-Let Training** form, perform the following steps:

Step 1 Navigate to the **Supervisor** tab >> **Setup** links >>**Instructor-Led Training** link.

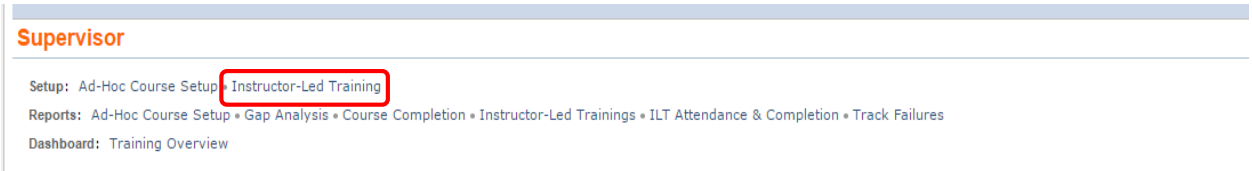


Figure 11: Accessing Instructor-Led Training Form

Step 2 Click the Ad-Hoc Course Setup link.

Instructor-Led Training Form

Use the I**nstructor-Led Training** form to schedule the instructor-led training courses and update the details of the course to all the applicable trainees.

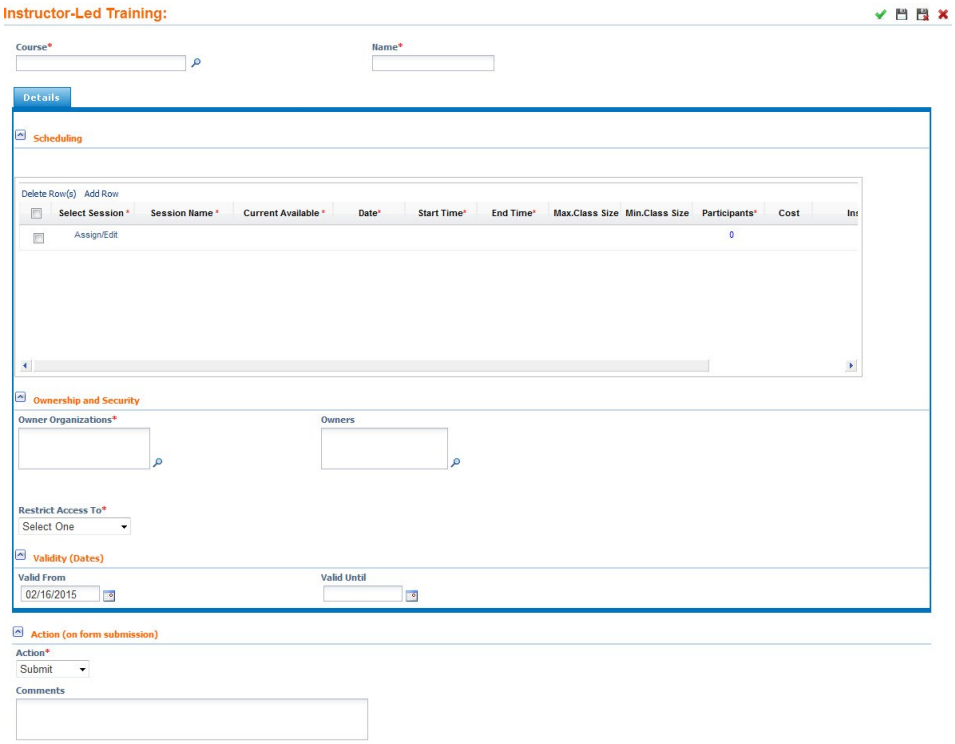


Figure 12: Instructor-Led Training Form

Instructor-Led Training Form > Header Section

Use the header section to select the course name and specify the name of the instructor-led course schedule.

Figure 13: Instructor-Led Training Form > Header Section

Field/List Name	Description
Course	Select the name of the instructor-led course that you want to schedule. **NOTE:** All the instructor-led courses that are part of published curriculums and have been assigned to at least one trainee are available for selection.
Name	The application automatically populates the course name in this field. You must change or modify the name so that it is a unique name. (For example, for the "Driving Safety" course you could modify it to "Driving Safety Division 2 April 2015".) **NOTE:** After typing the instructor-led training name, if you navigate to any other field, the instructor-led training name appears in the form title.

Instructor-Led Training Form > Details Tab

Use the **Details** tab to add the scheduling and ownership details of the instructor-led training. The **Scheduling** section of this tab is organized in a tabular format and you can add multiple scheduling details in this section. For example, you want to schedule a course on ethics for 100 participants, but you can only accommodate 25 participants in each training session. You can add four rows and specify the participant names and other details. Based on the schedule and the validity date you specified in the **Valid From** field, the respective course sessions are assigned to the trainees. You can schedule only those courses that are part of the published curriculum. You can schedule one day courses by specifying the start and end time. After the instructor-led training is published, the course assignments status are changed to **Scheduled**. The **Start** link in the **My Trainings** report is enabled, and the trainee can view the date, venue, and instructor details.

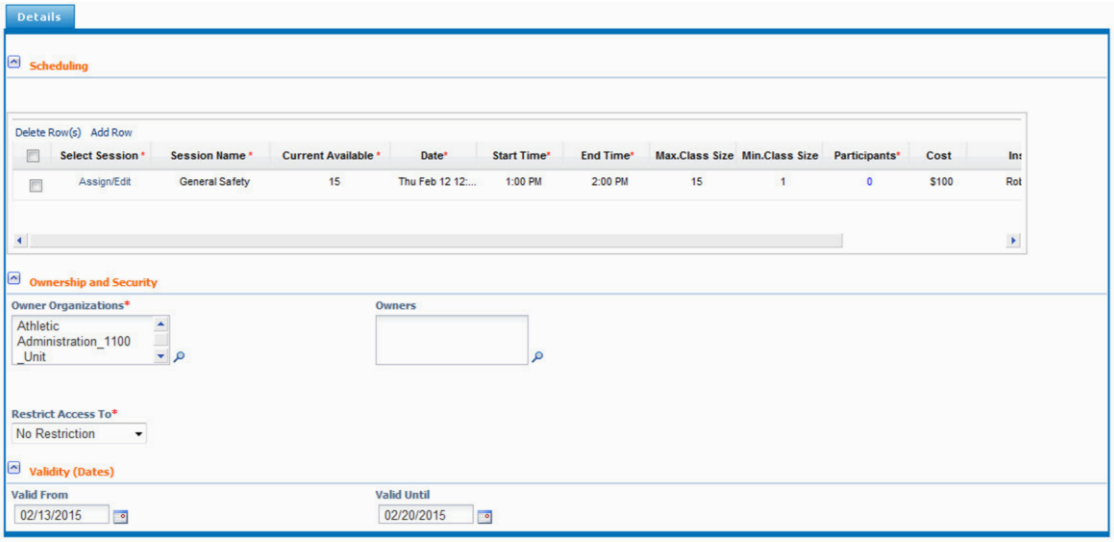
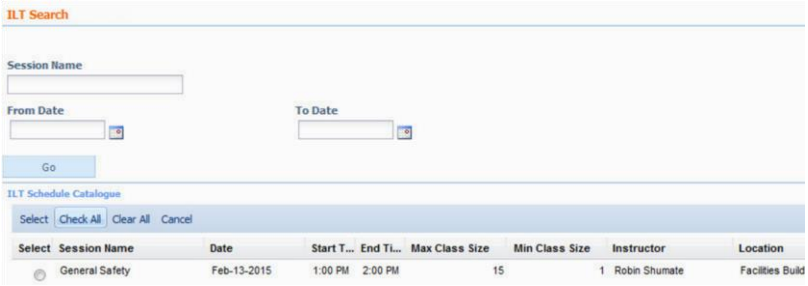
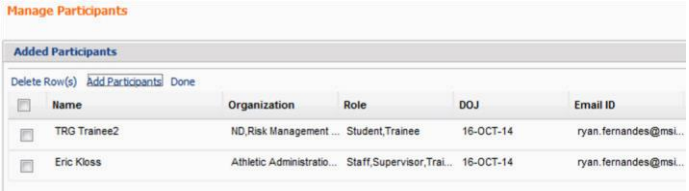
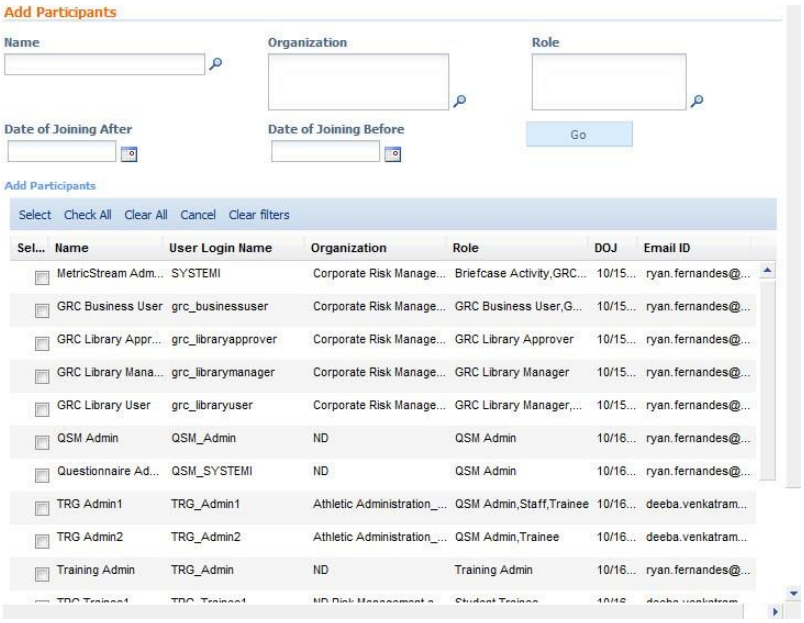


Figure 14: Instructor-Led Training Form > Details Tab

Scheduling This section is a multi-row region and organized in a tabular format.	
Field/List Name	**Description**
Add Row button	To add a schedule, click this button. The schedule-related fields appear in the tabular format. To add additional schedules, click this button as many times as required.
Select Session	1. Click **Assign/Edit** link to add the session names. The **ILT Search** window appears.  2. Select a session from this window. 3. Click the **Select** button. The selected session are updated in the **Scheduling** form.
Session Name	Displays the session name.
Current Available	Displays the number of available participants.
Date	Displays the date on which the instructor-led course session is scheduled. **NOTE:** You must enter the current date or a future date in this field.
Start Time	Displays the start time of the course. The timings are available in half hour intervals. **NOTE:** This field is configurable.
End Time	Displays the end time of the course. The timings are available in half hour intervals. **NOTE:** This field is configurable.
Max. Class Size	Displays the maximum number of trainees that can be accommodated for the course in a single batch.
Min. Class Size	Displays the minimum number of trainees that must be present to conduct the course. (Set at 1 by default.)

<table>
<tr><td>Participants</td><td>Use this link to add the participant’s name for the course.
When you add a new row, this column displays the value “0”.
To add the participants for the course, perform the following steps:
1. Click the hyperlinked “0” in the Participants column where you want to add the participant details. The Manage Participants tabular format window appears.
 
</td></tr>
<tr><td></td><td>2. Click the Add Participants button. The Add Participants window appears.
 

3. Select one or more participants from this window.
4. Click the Select button. The added participant details are updated in the Manage Participants tabular format.
5. Click the Done button. If you add a user who is selected earlier, the application displays the alert message “user has been ignored, as they are duplicate entries” appears.</td></tr>
<tr><td>Cost</td><td>Displays the cost of the course that you are scheduling.</td></tr>
<tr><td>Instructor</td><td>Displays the name of the instructor who is conducting the course.</td></tr>
<tr><td>Location</td><td>Displays the location where the course to be conducted.</td></tr>
</table>

Delete Row(s) button	To delete a particular row, perform the following steps: 1. Select the check box corresponding to the row that you want to delete. 2. Click the **Delete Row(s)** button. **NOTE:** To select all the rows at a time, use the check box available in the header row of the tabular format.

Ownership and Security Use this section to select the owners for the instructor-led course	
Owner Organization	Select one or more owner organizations responsible for maintaining this instructor-led course. This is **NOT** the set of organizations that this instructor-led course applies to. This field controls the workflow and security for the instructor-led courses where security is restricted to owner organizations. **NOTE:** If the **Restrict Access To** field is set to **Owner Organization**, then only users with the relevant activity in the selected organization can view the instructor-led course.
Field/List Name	**Description**
Owners	Select one or more owners of the current curriculum. Only owners of the course from the owner organization can edit the **Instructor-Led Training** form. The curriculum owners are the users who belong to the owner organizations with the **TRG - Manage Trainings** or **TRG - Manage All Trainings** activity. **NOTE:** If the initiator and owner are different, after you submit the **Instructor-Led Training** form, an assignment is generated to the instructor-led training owner to take action on the submitted instructor-led training details. **NOTE:** If the initiator and owner are the same users, then the form is published in the training library.
Restrict Access To	Select the control access rights of users for the instructor-led training. The following options are available: ● **No Restriction**: All the users from any organization with **TRG - View Training** or **TRG - Manage Trainings** activity can view and edit this instructor-led training. ● **Owner Organizations**: Only users in the owner organization of the current instructor-led training with **TRG - View Training** or **TRG - Manage All Trainings** activity can view and edit this instructor-led training.

Validity Dates Use this section to define the longevity of the curriculum.	
Valid From	Enter the date from which the current instructor-led training is valid. **NOTE:** This is the effective date of the course, and the course effective date is updated with the date that you enter in this field. **NOTE:** You must enter the current date or a future date in this field.
Valid Until	Enter the date until which the current instructor-led training is valid. **NOTE:** You must enter a date which is later than the specified date in the **Valid From** field.

ILT Search Window Function

The **ILT Search** window is comprised of the following sections:

- Search section
- Session name selection

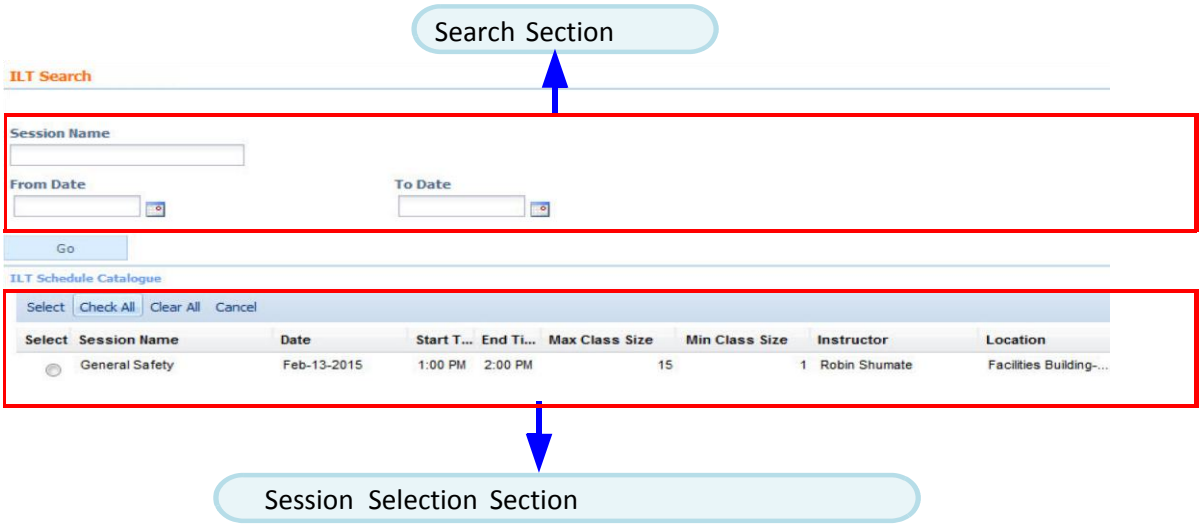


Figure 15: ILT Search Screen

ILT Search - Search Options

The following table describes the search options available in the **Add Participants** window.

Filter Name	Use This Filter to . . .
Name	Type the name of the participant.
Organization	Select the name of the organization to which the participant belongs.
Role	Select one more roles to which the participant belongs.

ILT Search - Add Participants Section

The following table describes the search options available in the **Add Participants Selection** section.

Options	Description
Select button	To add the selected participants, click this button
Check All button	To select all the participant names available in the **Add Participants Selection** section, click this button.
Cancel button	To close the **Add Participants** window, click this button.
Clear All button	To clear all the selected options, click this button.
Clear Filters button	To clear the data entered in all the search fields, click this button.

Columns

The following section describes the columns available in the **Add Participants** section.

Select check box	Select one or more check boxes corresponding to the participant names that you want to add in the **Name** column.
Session Name	The name of the session appears.
Date	Enter the date on which the instructor-led course is scheduled. **NOTE:** You must enter the current date or a future date in this field.

Start Time	Select the start time of the course. The timings are available in half hour intervals. **NOTE:** This field is configurable.
End Time	Select the end time of the course. The timings are available in half hour intervals. **NOTE:** This field is configurable.
Max. Batch Size	Type the maximum number of trainees that can be accommodated for the course in a single batch.
Min.Batch Size	Type the minimum number of trainees that must be present to conduct the course.
Instructor	The name of the instructor appears.
Location	The location where the course is conducted appears.

Manage Participants Window - Tabular Format Functionality

The following table describes the functions of tabular format available within the manage participants window.

Option/Column	**Description**
Delete Row(s) button	To delete a particular row, perform the following steps: 1. Select the check box corresponding to the row that you want to delete. 2. Click the **Delete Row(s)** button. **NOTE:** To select all the rows at a time, use the check box available in the header row of the tabular format.
Add Participants button	Use this button to add the participant details.
Done	Click this button to close the **Manage Participants Tabular Format** window.

The following details are displayed in the tabular format of the **Manage Participants** window:

Name (read-only)	The name of the participant appears.
Organization (read-only)	The organization to which the participant belongs appears.
Role (read-only)	The participant's assigned role appears.

Add Participants Window Functions

The **Add Participants** window is comprised of the following sections:

- Search section
- Participant selection section

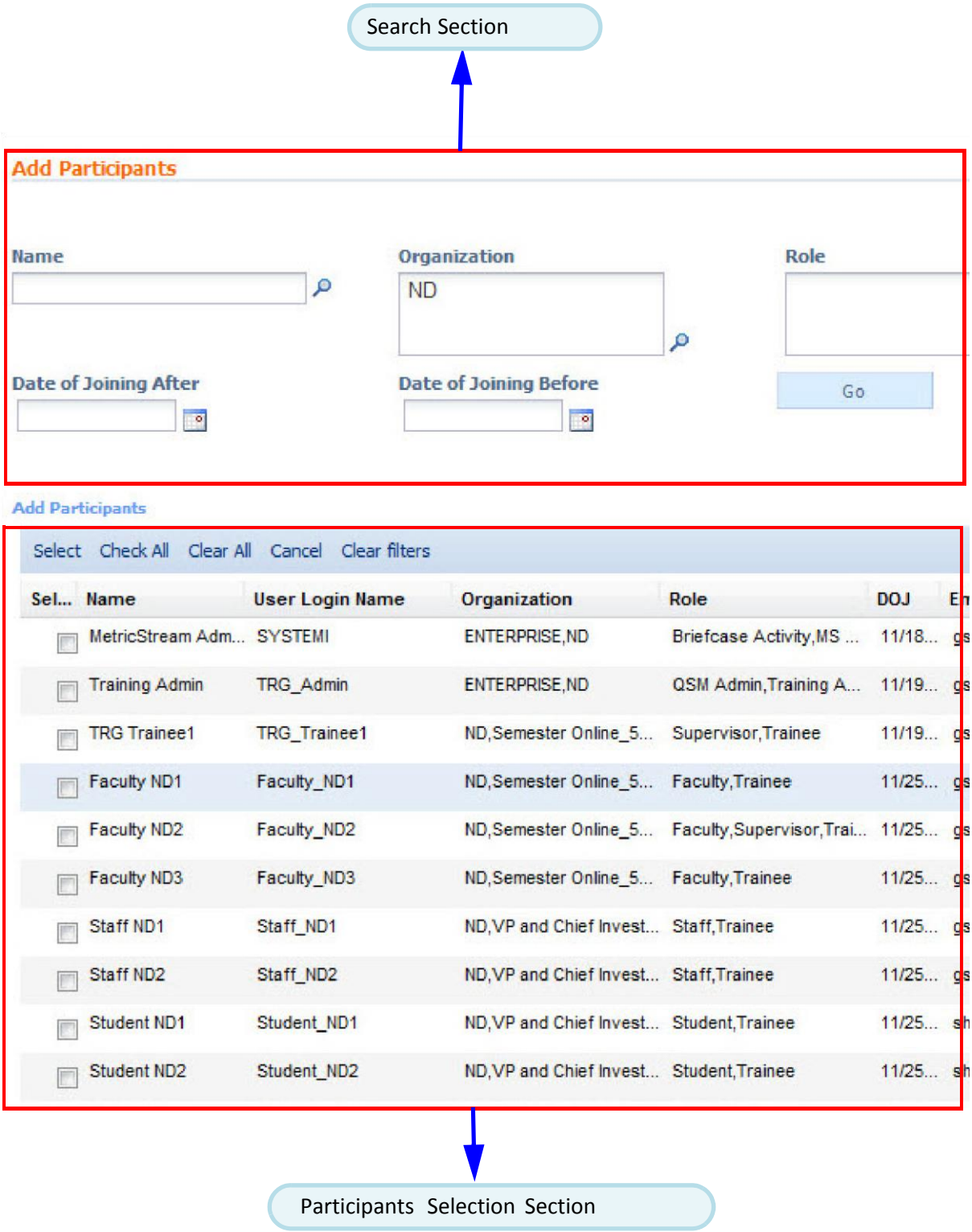


Figure 16: Add Participants Window

Add Participants Window - Search Options

The following table describes the search options available in the **Add Participants** window:

Filter Name	Use This Filter to . . .
Name	Type the name of the participant.
Organization	Select the name of the organization to which the participant belongs.
Role	Select one more roles to which the participant belongs.
Date of Joining After	Enter the date. **NOTE:** The application displays all the participants who have joined the organization after the specified date.
Date of Joining Before	Enter the date. **NOTE:** The application displays all the participants who have joined the organization prior to the specified date.
Go	After you click this button, application filters and displays the participant values based on the entered filter parameters.

Add Participants Window - Participants Selection Section

The following table describes the search options available in the **Participants Selection** section:

Options	Description
Select button	To add the selected participants, click this button
Check All button	To select all the participant names available in the **Participants Selection** section, click this button.
Cancel button	To close the **Add Participants** window, click this button.
Clear All button	To clear all the selected options, click this button.
Clear Filters button	To clear the data entered in all the search fields, click this button.

Columns

The following section describes the columns available in the **Participants Selection** section:

Select check box	Select one or more check boxes corresponding to the participant names that you want to add in the **Name** column.
Name	The name of the participant appears.
Organization	The name of the organization to which the participant belongs appears.
Role	The organizational role to which the participant belongs appears.
DOJ	The date on which the participant joined the organization appears.
Email ID	The participant's email address is listed.

Instructor-Led Training Form > Action Section

Use the **Action** section to take action on the current form.

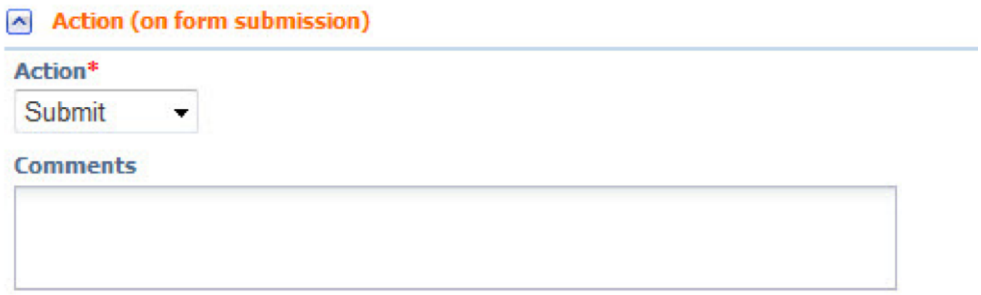


Figure 17: Instructor-Led Training Form > Action Section

Field/List Name	Description
Action (On Form Submission) Use this section to provide your recommended action on the current form.	
Action	The following actions are available in the **Instructor-Led Training** form while you schedule a course: **Submit**: To submit the completed form, select this option. **NOTE:** After you submit the form, the current form is routed to the next level based on the ownership and security details specified in the **Details** tab.

Comments	Type your comments regarding the instructor-led training. After you submit the form, the **Comments History r**eport is updated with your comments.

Form Submission

To take action on the current form, click the **Submit** icon.

Task Assignments and E-Mail Notifications

After you submit the current form, the following task assignments and e-mail notifications are generated.

Assigned to . . .	When you Select the Option . . .	Form Assigned	E-Mail Sent to . . .
Owner **NOTE:** If the initiator and owner are different users, the assignment is only assigned to owner.	**Submit** in the **Action** field	Instructor-led Training	Owners

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Reports

4

This chapter provides information on the reports that are available in the Training Management module of the complyND application.

Sections of this chapter:

1. What Is a Report?
2. Report Filters
3. Report Drill-Downs
4. Load Preferences
5. Training Management Application Reports

What Is a Report?

A report is a tabular representation of meaningful data which you can use to make informed decisions. It is normally made up of one or more columns. Some reports provide drill-down reports.

Report Filters

Use the report filters to narrow down your search. The search parameters perform the function of filters to refine the output of reports. You can access report filters by clicking the **Filter** button on the upper-right corner of the report page.

Alternatively, you can access report filters by clicking the downward-pointing arrow as shown in the below figure.

Figure 35: Accessing Report Filters

After you click the arrow or **Filters** button, the related filter window appears. Enter the search criteria, as required. Click the **Submit** button. Based on the criteria that you enter, the report data is generated. To clear the contents in all filter fields click the **Clear All** button. To hide the filters, click the **Hide Filters** button or upward-pointing arrow at the bottom of the filter fields' window.

Figure 36: Report Filters

The following two types of parameters are available in the filter forms:

- Mandatory filter parameters: You must provide data in the parameter field.
- Optional filter parameters: You can provide data in the parameter fields or leave them blank.

You can enter search criteria in all filter fields or in just a few fields, as required. The application applies an "AND" condition to all the filter criteria that you enter. You can also click the **Submit** button without entering any filter criteria in any of the filter fields, provided there are no mandatory filter fields. This type of search returns one or more existing content in the application. If the report filters consist of any mandatory filter parameters, the filter window appears first. Otherwise, the report appears first and the filter window is collapsed within the report.

Report Drill-Downs

A few reports can have associated drill-down reports or forms. To access drill-down reports, click a column link in the parent report. A child report or associated form appears.

NOTE: It is advisable to access parent reports, which provide access to drill-down reports, from the **Reports** tab as parent reports may require key field values (parameter entries). To access drill-down reports, click the text that is clickable in the relevant column. Not all reports have a drill-down report.

Load Preferences

The Load Preference feature allows you to save filter preferences and report preferences in a specific report. Saved preferences are the saved searches where the commonly used criteria is saved and reused. By using the load preferences option, you can avoid re-entering the filter or layout criteria every time you access the report. The saved preference is both report-specific and user-specific.

Saving Filter Preferences

If you want to save your filter preference, the report that you are running must be configured with filters.

To save your filter preferences for a specific report:

Step 1 Navigate to the specific report.

Step 2 Run the report.
The report appears.

Step 3 Click . The filter screen appears with one or more available filters.

Step 4 Enter the filter criteria, as required.

Step 5 Click inside the **Load Preference** filed.

Step 6 Type a suitable name for the specific load preference. For example, Filter 1.

NOTE: If one or more load preferences are saved, these values appear in the drop-down list. If there are no values, you must type the required value within the **Load Preference** field.

Step 7 Click the **Save** button. The load preference is saved.

Step 8 Click the **Submit** button. Once you click the **Submit** button, the **Delete** button is available. To delete a saved load preference, select that specific load preference and click the **Delete** button.

Now, you have saved your load preference for a specific report. You may save one or more load preferences, as required. For every additional load preference that you want to create, repeat the steps 1 through 8.

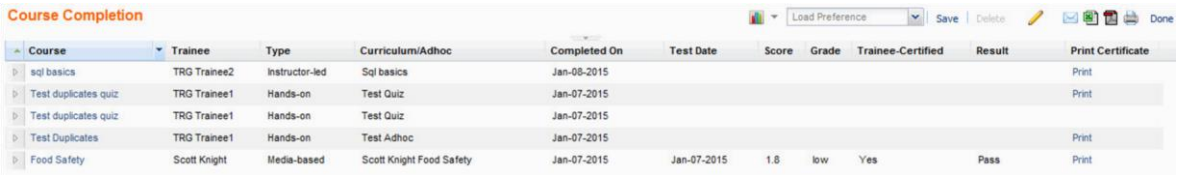
Training Management Application Reports

The following table lists all the reports available in the **Training Management** module. The common questions regarding the use of the report and an answer to the question is available in the below table.

Sl. No.	To Answer this Question . . .	Use this Report . . .
1.	How can I view the list of courses that I have completed?	Course Completion Report
2.	How can I view the list of courses that are assigned to my staff?	Gap Analysis Report
3.	How can I view the list of instructor-led courses that are scheduled?	Instructor-Led Trainings Report
4.	How do I view the list of Ad-Hoc Courses available in the Training Management application?	Ad-Hoc Course Setup Report
5.	Where can I view the attendance for instructor-led courses and course completion?	ILT Attendance & Completion Report
6.	Where can I view details of one or more courses that failed during test process?	Track Failures Report

Course Completion Report

Use the **Course Completion** report to view the list of all the curriculums and courses completed by the users.



Course	Trainee	Type	Curriculum/Adhoc	Completed On	Test Date	Score	Grade	Trainee-Certified	Result	Print Certificate
sql basics	TRG Trainee2	Instructor-led	Sql basics	Jan-08-2015						Print
Test duplicates quiz	TRG Trainee1	Hands-on	Test Quiz	Jan-07-2015						Print
Test duplicates quiz	TRG Trainee1	Hands-on	Test Quiz	Jan-07-2015						
Test Duplicates	TRG Trainee1	Hands-on	Test Adhoc	Jan-07-2015						Print
Food Safety	Scott Knight	Media-based	Scott Knight Food Safety	Jan-07-2015	Jan-07-2015	1.8	low	Yes	Pass	Print

Figure 38: Course Completion Report

You can expand each row and view the description of the content. To expand a row, click the Expand icon next to the row that you want to expand.

NOTE: NOTE: To hide the additional details, click the Collapse icon .

Column Name	Displays the . . .
Course	Name of the Course completed by the user. Drilled-Down: ● **Course** form
Trainee	Name of the user.
Type	Type of course completed by the user. Following are the possible course types: ● Instructor-led ● Media-based ● Hands-on ● Self-paced
Score	Course completion score of the user.
Grade	Course grade of the user.
Completed On	Course completion date.
Curriculum/Ad-hoc	Name of the curriculum/ad-hoc to which the course is associated.
User	Name of the user who completed the course.
Trainee-Certified	**Yes** or **No**. ● **Yes**: Indicates that the user is certified for the course. ● **No**: Indicates that the user is not certified for the course.

Result	Select the type of result. The following options are available: ● Select All ● Pass ● Fail ● Not applicable
Print Certificate	Click **Print** link to print the certificate.

Course Completion Report Filters

Use these filter parameters to retrieve specific records in the related report.

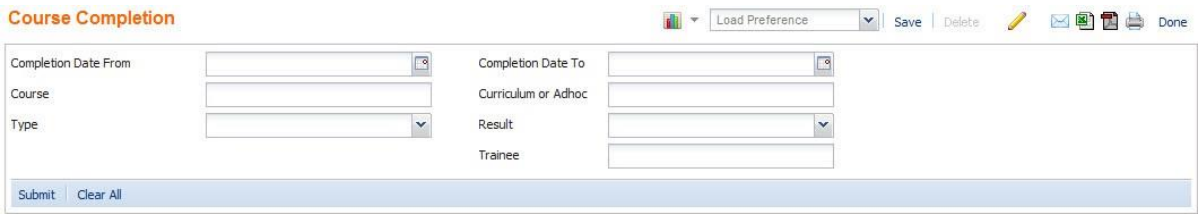


Figure 39: Course Completion Report Filters

The report details are narrowed down based on the values that you select in the filter fields.

Filter name	**Use this filter to . . .**
Course	Type the name of the course.
Completion Date From	Enter a date. **NOTE:** The application displays all the courses that are completed after the entered date.
Curriculum or Ad-hoc	Type the name of the curriculum.
Type	Select the type of course. The following options are available: ● Instructor-led ● Media-based ● Hands-on ● Self-paced
Completion Date To	Enter a date. **NOTE:** The application displays all the courses completed up to and including the entered date.

Result	Select the type of result. The following options are available: ● Yes ● No
Trainee	Type the name of the trainee.

Gap Analysis Report

Use the **Gap Analysis Report** to view the list of courses with the status of **In-progress** and **Not Started** for users belonging to a particular organization in a flow-down fashion.

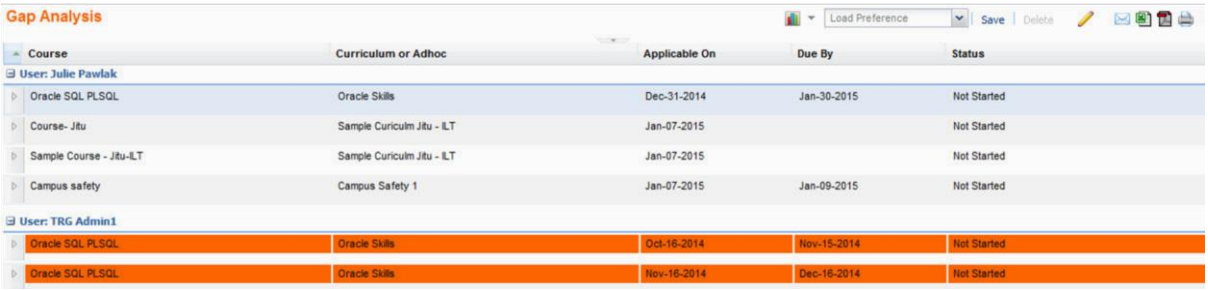


Figure 40: Gap Analysis Report

You can expand each row and view description of the content.

To expand a row, click the **Expand** icon next to the row that you want to expand.

NOTE: To hide the additional details, click the **Collapse** icon .

The courses are color-coded based on the due date and validity dates. The following are the color codes and descriptions:

- Courses that have passed the due date are highlighted in red.
- Courses that are retriggered and have passed the due date previously are highlighted in orange. The subsequent assignments are assigned based on the validity of the course.

Column name	Displays the . . .
User	Name of the user course is assigned to.
Course	Name of the course.
Curriculum or Ad-hoc	Name of the curriculum the course is attached to.
Applicable On	Date when the first course is assigned to the user.

Due By	Date when the course must be completed. **NOTE:** The courses passed the due date are highlighted in red.
Status	Status of the Course. Following are the possible statuses: ● **Not Started**: The courses that are assigned to the user but have not been started. ● **In Progress**: The courses in progress. ● **Scheduled**: The Instructor-Led trainings that are scheduled.

Gap Analysis Report Filters

Use these filter parameters to retrieve specific records in the related report.

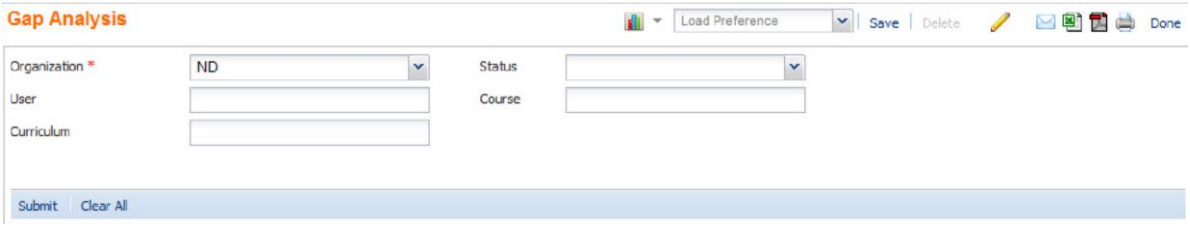


Figure 41: Gap Analysis Report Filters

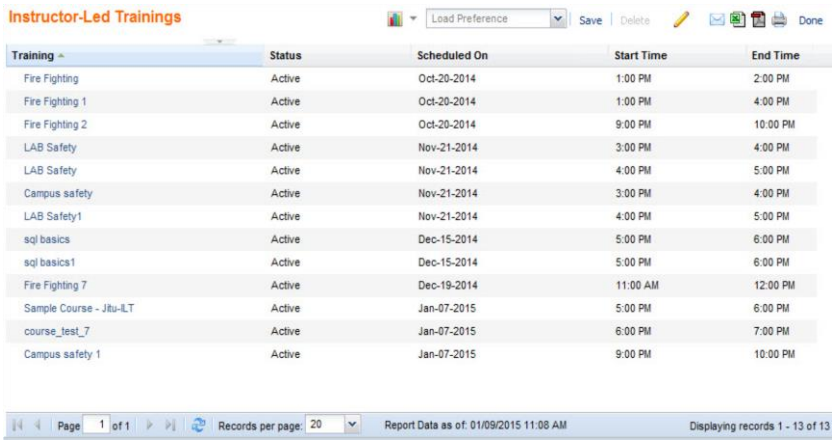
The report details are narrowed down based on the values that you select in the filter fields.

Filter Name	Use this filter to . . .
Organization	Select one or more organizations.
User	Type the name of the user.
Status	Select the status of the course. The following options are available: ● **All**: If you want to view the course assignments with the in progress and not started statuses, select this option. ● **In Progress**: If you want to view the course assignments in progress, select this option. ● **Not Started**: If you want to view the course assignments that have not been started yet, select this option. ● **Scheduled**: View the scheduled Instructor-Led trainings
Course	Type the name of the course.

Curriculum	Type the name of the curriculum the course is attached to.

Instructor-Led Trainings Report

Use the **Instructor-Led Trainings** report to view the details of the scheduled instructor-led courses.



Instructor-Led Trainings

Load Preference | Save | Delete | Done

Training	Status	Scheduled On	Start Time	End Time
Fire Fighting	Active	Oct-20-2014	1:00 PM	2:00 PM
Fire Fighting 1	Active	Oct-20-2014	1:00 PM	4:00 PM
Fire Fighting 2	Active	Oct-20-2014	9:00 PM	10:00 PM
LAB Safety	Active	Nov-21-2014	3:00 PM	4:00 PM
LAB Safety	Active	Nov-21-2014	4:00 PM	5:00 PM
Campus safety	Active	Nov-21-2014	3:00 PM	4:00 PM
LAB Safety1	Active	Nov-21-2014	4:00 PM	5:00 PM
sql basics	Active	Dec-15-2014	5:00 PM	6:00 PM
sql basics1	Active	Dec-15-2014	5:00 PM	6:00 PM
Fire Fighting 7	Active	Dec-19-2014	11:00 AM	12:00 PM
Sample Course - Jitu-ILT	Active	Jan-07-2015	5:00 PM	6:00 PM
course_test_7	Active	Jan-07-2015	6:00 PM	7:00 PM
Campus safety 1	Active	Jan-07-2015	9:00 PM	10:00 PM

Page 1 of 1 | Records per page: 20 | Report Data as of: 01/09/2015 11:08 AM | Displaying records 1 - 13 of 13

Figure 42: Instructor-Led Trainings Report

You can expand each row and view the description of the content. To expand a row, click the **Expand** icon next to the row that you want to expand.

NOTE: To hide the additional details, click the **Collapse** icon .

Column Name	Displays the . . .
Training	Name of the instructor-led course scheduled. Drilled-Down: ● Instructor-Led Training form
Status	Status of the Instructor-led training course. Following are the possible statuses: ● **Active**: Instructor-led trainings that have not passed their due (expiration) date. ● **Inactive**: Instructor-led trainings that have passed their due (expiration) date.
Scheduled On	Date the instructor-led course is scheduled.
Start Time	Start time of the instructor-led course.
End Time	End time of the instructor-led course.

Instructor-Led Trainings Report Filters

Use these filter parameters to retrieve specific records in the related report.

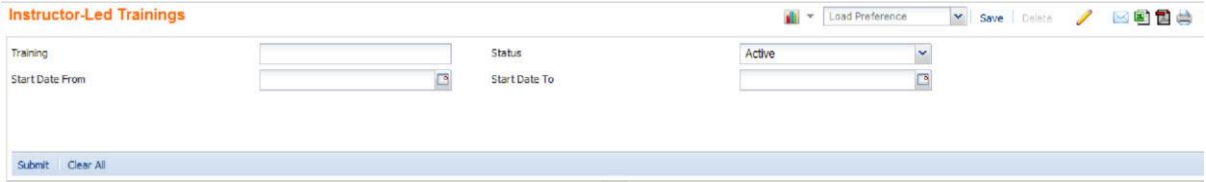


Figure 43: Instructor-Led Trainings Report Filters

The report details are narrowed down based on the values that you select in the filter fields.

Filter Name	Use this filter to . . .
Status	Select the status of the instructor-led training. ● **All**: If you want to view all the instructor-led trainings in different statuses, select this option. ● **Active**: If you want to view the instructor-led trainings which have not passed their due (expiration) date, select this option. ● **Inactive**: If you want to view the instructor-led trainings which have not passed their due (expiration) date, select this option.
Training	Type the name of the instructor-led training.
Start Date From	Enter a date. **NOTE:** The application displays all the instructor-led trainings that are scheduled on or after the entered date.
Start Date To	Enter a date. **NOTE:** The application displays all the instructor-led trainings that are scheduled before entered date.

Ad-Hoc Course Setup Report

Use the **Ad-Hoc Course Setup Report** to view the details of the ad-hoc courses.

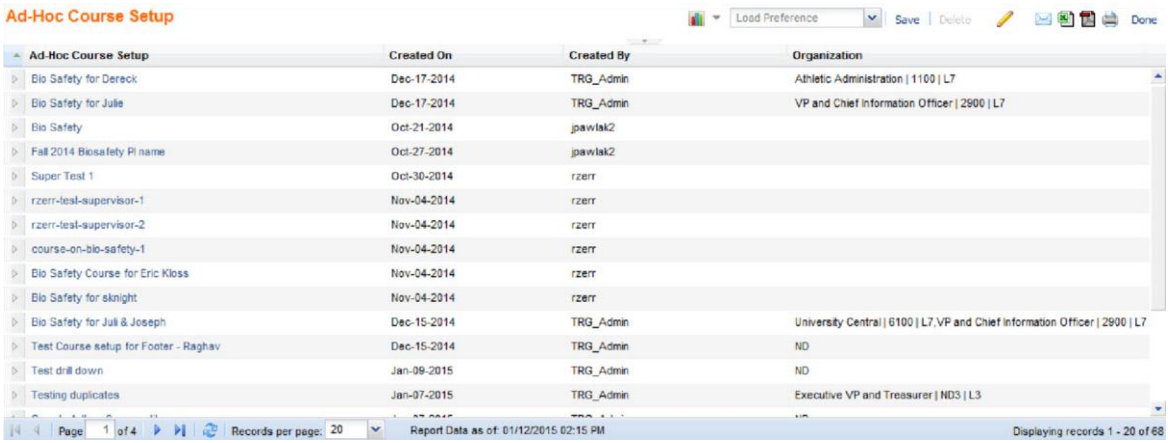


Figure 44: Ad-Hoc Course Setup Report

You can expand each row and view the description of the content. To expand a row, click the Expand icon next to the row that you want to expand.

Filter Name	Use this filter to . . .
Ad-Hoc Course Setup	Name of the Ad-Hoc course that is created.
Created On	Date on which the Ad-Hoc course is created by Training Admin.
Created By	Name of the person who created the Ad-Hoc course.
Organization	The name of the organization to which the participant belongs.

NOTE: NOTE: To hide the additional details, click the Collapse icon .

Ad-Hoc Course Setup Report Filters

Use these filter parameters to retrieve specific records in the related report.

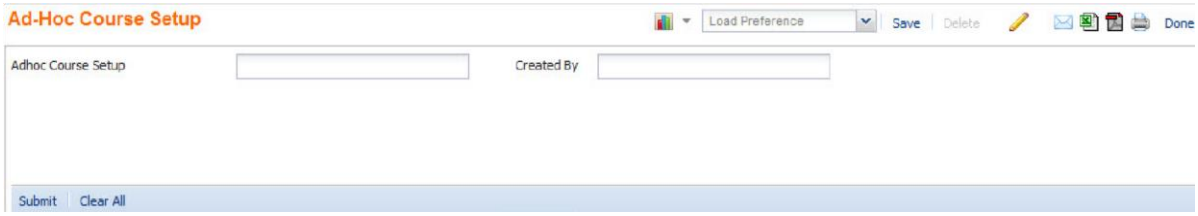


Figure 45: Test Course Report Filters

The report details are narrowed down based on the values that you select in the filter fields.

Filter Name	Use this filter to . . .
Ad-hoc Course Setup	Select one or more Ad-Hoc course types.
Created By	Type the name of the user who created the course.

ILT Attendance & Completion Report

Use the **ILT Attendance & Completion Report** to view the details of the Instructor Led Training Attendance and Completion of courses.

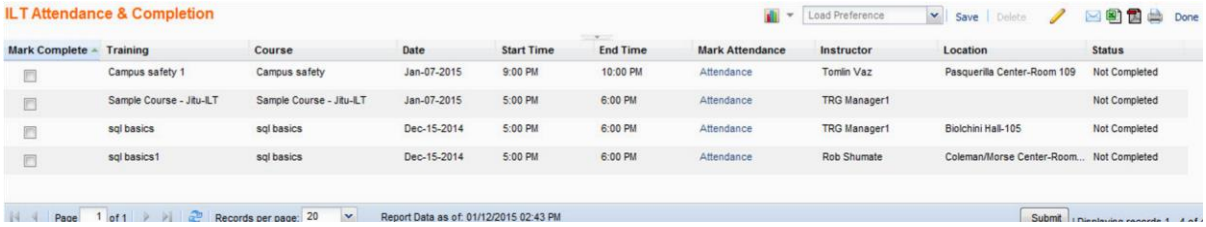


Figure 46: ILT Attendance & Completion Report

You can expand each row and view the description of the content. To expand a row, click the **Expand** icon next to the row that you want to expand.

NOTE: NOTE: To hide the additional details, click the **Collapse** icon .

Column Name	Displays the . . .
Mark Complete	Click the check boxes in **Mark Complete** Column of **User Attendance** and then click **Done**.
Training	Name of the instructor-led course that is scheduled.
Course	Name of the course.
Date	Date of the instructor-led course.
Start Time	Start time of the instructor-led course.
End Time	End time of the instructor-led course.
Instructor	Name of the instructor.
Location	Location where the course is conducted.
Status	Status of the instructor-led course.

ILT Attendance & Completion Report Filters

Use these filter parameters to retrieve specific records in the related report.

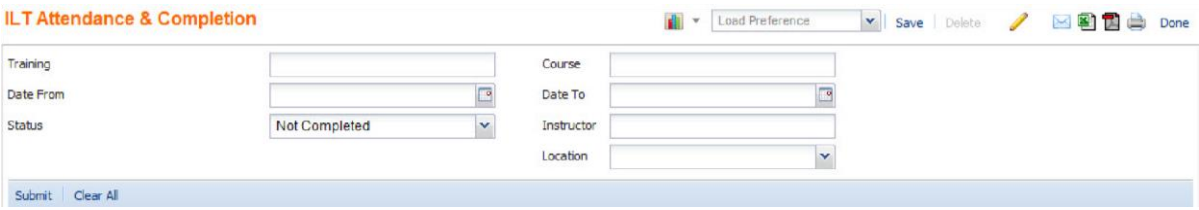


Figure 47: ILT Attendance & Completion Report Filters

The report details are narrowed down based on the values that you select in the filter fields.

Filter name	Use filter to . . .
Training	Select one or more course types.
Course	Type the name of the user who created the course.
Date From	Select the “from” date of the course.
Date To	Select the “to” date of the course.
Status	Select the status of the instructor-led course.
Instructor	Name of the instructor.
Location	Select the location of the course.

Track Failures Report

Use the **Track Failure Report** to view the list of courses with a status of **In-progress** and **Not Started** for different users within a particular organization in a flow-down fashion.

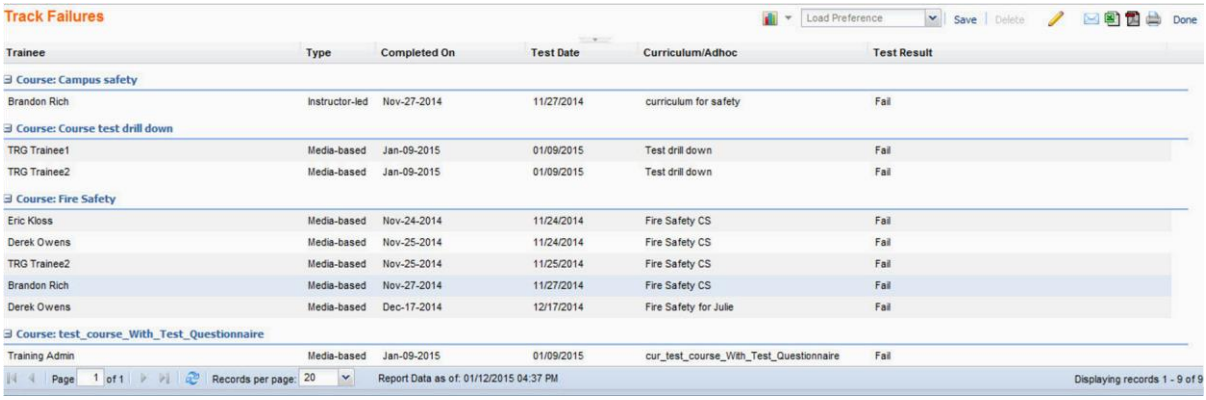


Figure 48: Track Failure Report

You can expand each row and view description of the content. To expand a row, click the **Expand** icon next to the row that you want to expand.

NOTE: To hide the additional details, click the **Collapse** icon .

The courses are color-coded based on the due date and validity dates. The following are the color codes and descriptions:

- The courses passed the due date are highlighted in red.
- The courses that are retriggered and have passed the due date previously are highlighted in orange. The subsequent assignments are assigned based on the validity of the course.

Column name	Display the . . .
Trainee	Name of the trainee the course is assigned to.
Type	Type of the course. Following are the possible course types: • Instructor-led • Media-based • Hands-on • Self-paced
Completed On	Course completion date.
Test Date	Course test date.
Curriculum/Ad-hoc	***NOTE:*** Name of the Curriculum/Ad-hoc the course is associated with.
Test Result	Result of the test. • Pass • Fail

Track Failures Report Filters

Use these parameters to retrieve specific records in the related report.

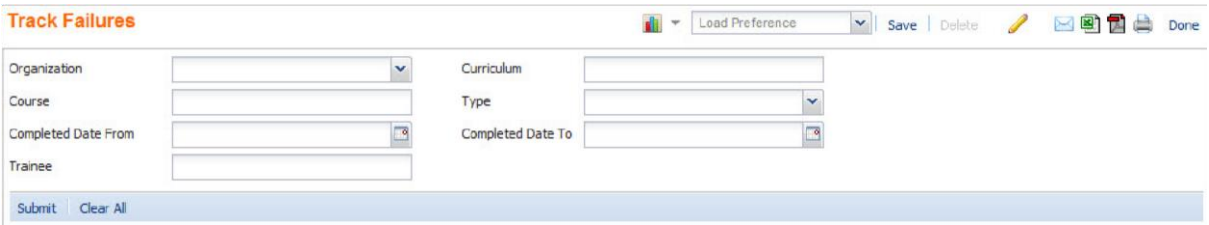


Figure 49: Track Failures Report Filters

The report details are narrowed down based on the values that you select in the filter fields.

Filter Name	Use this filter to . . .
Organization	Select one or more organizations.
Curriculum	Name of the curriculum the course is attached to.
Course	Name of the course.
Type	Type the name of the course.
Completed Date From	Enter the “from completion” date.
Completed Date To	Enter the “to completion” date.
Trainee	Type the name of the trainee.

The report details are narrowed down based on the values that you select in the filter fields.

Filter Name	Use This Filter to . . .
Status	Select the status of the course. The following options are available: ● **In Progress**: If you want to view the courses that are in progress, select this option. ● **Not Started**: If you want to view the courses that are yet be started, select this option. ● **Scheduled**: If you want to view the instructor-led courses that are scheduled, select this option.

Dashboards

5

This chapter provides information on the dashboards that are available for the **Training Management** application.

Sections of this chapter:

1. What is a Dashboard?
2. Accessing Charts
3. Search
4. Dashboard Drill-Downs
5. Interactive Legends
6. Training Management Dashboards

What is a Dashboard?

A dashboard is a page that displays one or more charts. A chart is a graphical representation of data in which the data is represented by symbols, such as, bars in a bar chart, lines in a line chart, or slices in a pie chart.

Dashboards enable you to make informed decisions.

Accessing Charts

You can access the charts through the **Supervisor**. The dashboard name is listed as a link in the header section.

Accessing Dashboards

Step 1 Navigate to the **Supervisor** tab >> **Dashboard**

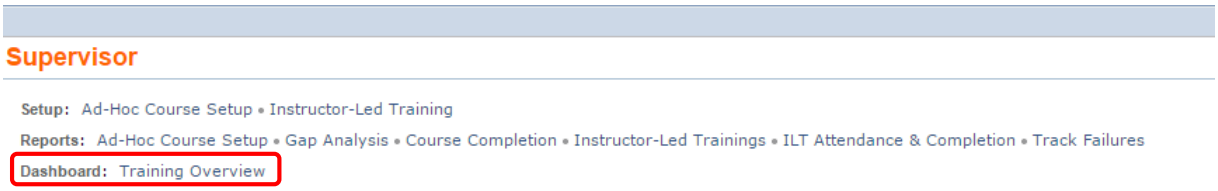


Figure 56: Accessing Dashboards

Step 2 Click the required dashboard name link. The dashboard appears.

Search

Using the search parameters, you can narrow down the search for the dashboard.

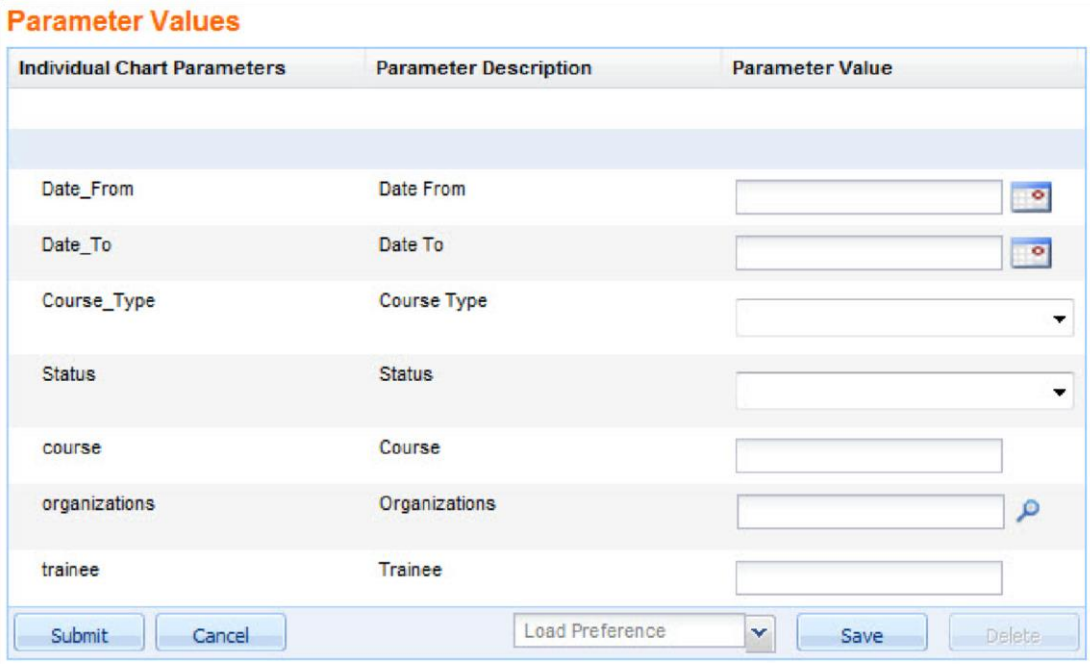


Figure 57: Search Parameter

Dashboard Drill-Downs

The drill-down option enables you to view associated dashboard charts and reports from the current chart. Move the mouse over the data in the chart. If the mouse pointer changes to a hand symbol, it is an indication that there is a drill-down available. Click the data point. The drill-down chart or report appears.

Interactive Legends

The interactive legends allow the user to click the icon (legend) of a particular data series to hide it so that the user can focus on the other data available in the chart. The interactive legend feature allows a section of the chart to slide-out and slide-in or hide and display.

Training Management Dashboards

The following table provides the list of all the dashboards available to supervisors in the Training Management application.

Sl Number	Dashboard Name
1.	Training Overview Report

Training Overview Filters

Use the **Training Overview** filters to view the **Training Overview** dashboard based on the search criteria.

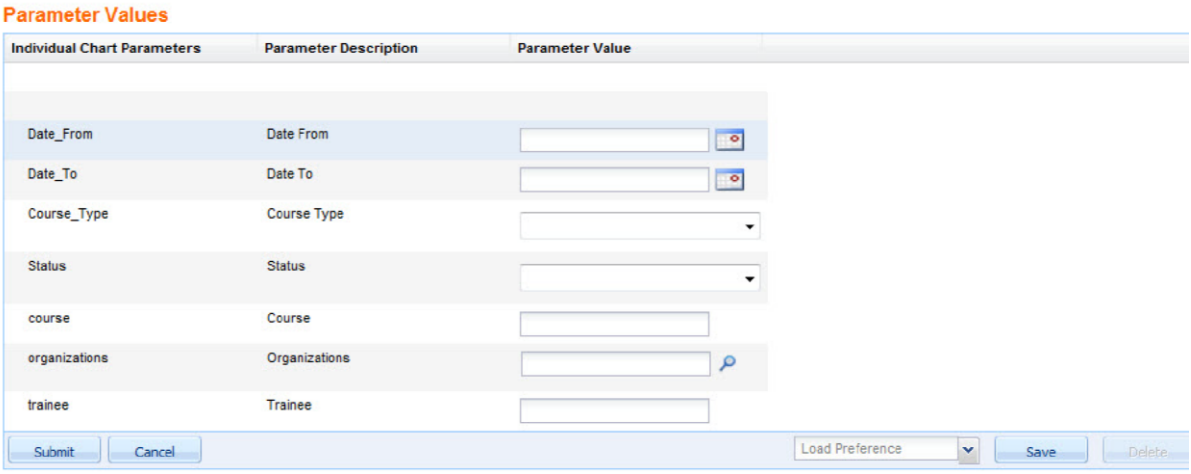


Figure 58: Training Overview Filters

Use these filters to view the training overview dashboard. The dashboards are displayed based on the values that you select in the filter fields.

File Name	Description
Date From	Date from which to display the details. (For example, from January 1, 2015.)
Date To	Date until which to display the details. (For example, to April 1, 2015.)

Course Type	Select the type of course ● Instructor-led ● Media-based ● On-the-job ● Self-paced
Status	Status of the course. Following are the possible statuses: ● **Not Started**: The courses that are assigned but not started ● **In-Process**: The courses that are assigned and have been started. ● **Scheduled**: The courses that are assigned and scheduled. ● **Completed**: The courses that are assigned and completed.
Course	Name of the course.

Field Name	Description
Organizations	Name of the organization.
Trainee	Name of the trainee.

Form Submission

Submit	To view the dashboard, click this button.
Cancel	To cancel the entered search criteria and exit the **Parameter Values** screen click this button.

Training Overview Report

The **Training Overview** chart is a pie chart.

Training Overview

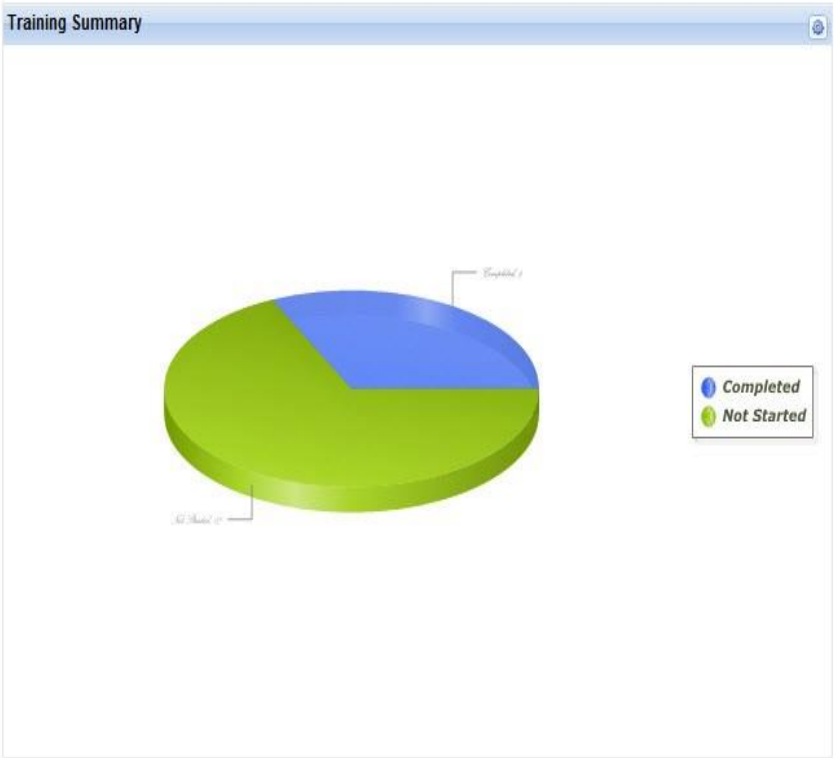


Figure 59: Training Overview Report

Description	Drilled-Down
This dashboard is a pie chart. It displays the summary of training reports	**Training Summary Report**

This page was left blank intentionally.

Glossary

Course

Refers to an individual topic for training.

Curriculum

A curriculum is a collection of courses that are mapped to organization, role or custom user groups.

Instructor-Led Training

The instructor-led course is a setup for a particular set of target audience.

Reports

A tabular representation of data.