



# **Learning and Safety Management System User's Guide**

**Version 5.3**



# Table of Contents

## Part I Welcome to the Learning and Safety Management System

1 What's New in Release 5.3 .....	9
2 Verify Minimum System Requirements .....	9
3 Contact PureSafety .....	10

## Part II Learning the Basics of LSMS Enterprise

1 Log in to LSMS Enterprise .....	12
2 Reset a Forgotten Password .....	12
3 Configure User Settings .....	13
4 Log Out of LSMS Enterprise .....	15
5 Use the Search Feature .....	15

## Part III Understanding the Home Page

1 Use the Menu Bar .....	18
2 Learn About the Home Page .....	19
3 Take Your Assignments .....	19
4 Review Your Assignments .....	20
5 Request Excuse .....	20
6 Reprint Diploma .....	21
7 Manage Your Messages .....	22
View Your Messages .....	22
Compose Messages .....	23
Reply to Messages .....	24
Forward Messages .....	26
Archive Messages .....	27
Approve Requests .....	28

## Part IV Understanding the Training Library

1 Manage Training Units .....	32
Create Tests .....	35
Create Surveys .....	37
Create Training Assessments .....	39
Create Rich-Text Documents .....	41
Create a File or Website Training .....	42
Create Third-Party Training .....	44
Create Offline Training .....	44
Register Users for Offline Training .....	46
Associate Documents to Offline Training .....	47
Assign Training to Me .....	48

Copy Training Units .....	49
Preview Training Units .....	50
View Properties of Training Units .....	50
Assign Training Units .....	53
Edit Training Units .....	54
Delete Training Units .....	56
<b>2 Organize Training Units .....</b>	<b>57</b>
Create a Lesson, Course, or Curriculum .....	58
Edit a Lesson, Course, or Curriculum .....	59
Delete a Lesson, Course, or Curriculum .....	60
<b>3 Manage Assignments .....</b>	<b>60</b>
Create Assignments .....	61
Create One-Time Assignments .....	64
Create One-time Series .....	67
Create Recurring Assignments .....	70
Create Recurring Series .....	73
Create Certifications .....	76
View Assignment Details .....	79
Edit Assignments .....	79
Edit One-Time Assignments .....	80
Edit One-Time Series .....	80
Edit Recurring Assignments .....	81
Edit Recurring Series .....	82
Edit Certifications .....	83
Stop All Future Recurrences .....	83
Delete Assignments .....	84
<b>4 Manage Category Tags .....</b>	<b>84</b>
Create Category Tags .....	85
Associate Training to Category Tags .....	86
Edit Category Tags .....	86
Delete Category Tags .....	87
<b>5 Excuse Training / Mark Complete without Request .....</b>	<b>87</b>

## Part V Understanding the Organization Directory

<b>1 Maintain Organization Units .....</b>	<b>93</b>
Create Organization Units .....	93
Add Employees to Organization Units .....	94
Edit Organization Units .....	95
Delete Organization Units .....	96
Maintain Organization Unit Administrators .....	97
<b>2 Maintain Employees .....</b>	<b>97</b>
Create Employees .....	98
Edit Employees .....	100
Create Users from Employees .....	100
Delete Employees .....	102
Associate Unassociated Employees .....	102
View Active Assignments .....	103
View Organization Units and Groups .....	104
<b>3 Maintain Groups .....</b>	<b>104</b>

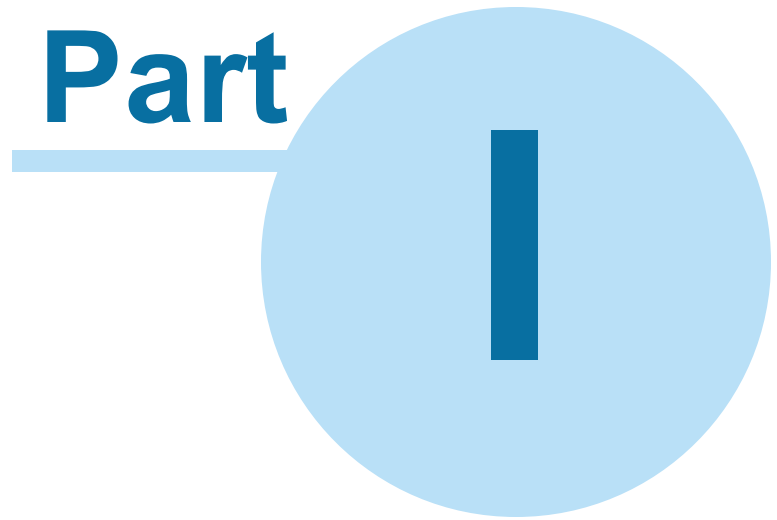
Create Groups .....	105
Edit Groups .....	106
Delete Groups .....	107
<b>4 Maintain Security Roles .....</b>	<b>107</b>
Create Security Roles .....	108
Edit Security Roles .....	109
Delete Security Roles .....	110
<b>5 Create Imports .....</b>	<b>111</b>

## Part VI Understanding the Reports Directory

<b>1 Run a Report .....</b>	<b>114</b>
<b>2 View the Last Run Report .....</b>	<b>114</b>
<b>3 Export a Report .....</b>	<b>115</b>
<b>4 Schedule a Report .....</b>	<b>116</b>
<b>5 Save a Report .....</b>	<b>118</b>
<b>6 Review Available Reports .....</b>	<b>119</b>
Assignments at a Glance Report .....	119
Assignments Completed Under Minimum Time Report .....	119
Assignment History Report .....	119
Certifications Report .....	119
Completion Status Report .....	120
Employee Details Report .....	120
Executive Training Summary Report .....	120
For CEU Credit Report .....	120
Hours Assigned Report .....	120
Offline Training Detail Report .....	120
Offline Training Manifest Report .....	120
People Assignments Report .....	120
People at a Glance Report .....	121
People Summary Report .....	121
Question at a Glance Report .....	121
System Usage Summary Report .....	121
Tests Completed Under Minimum Time Report .....	121
Test Scores Report .....	121
Test Summary Report .....	122
Top Training Titles Report .....	122
Training Assignment Report .....	122
Training at a Glance Report .....	122
Training Data for Export Report .....	122
Training Details Report .....	122
Training Status Details Report .....	122
Training Usage Summary Report .....	123
Unassigned Trainee Report .....	123
Usage Details Report .....	123
User Account Information Report .....	123

<b>Index</b> .....	125
--------------------	-----

**Part**



**Welcome to the  
Learning and Safety  
Management System**





# Welcome to the Learning and Safety Management System

The core purpose of PureSafety's Learning and Safety Management System (LSMS) is to empower its clients by providing them with a comprehensive and easy-to-use safety training and safety management software solution.

The LSMS is a customizable, online safety training and management solution that provides an engaging, interactive learning experience. As a result, you can change behaviors, improve business performance, prevent injuries, and most importantly, save lives. The LSMS has the following features:

- It is Web-based, which means that employees can access their training anytime, anywhere.
- It provides users the ability to track and manage their training programs the same way.
- It emphasizes training management and gives you the ability to track the inventory of training content and manage training assignments made to each employee.
- It provides useful reports on employees, assignments, and training units.
- It includes a Content Creation System (CCS) that allows users to customize, manage, and deploy training that tailors to the specific needs of each client.

## What's New in Release 5.3

Below is a list of new features included in LSMS 5.3. Click the links provided to access more information about each new feature.

- [Improved Assignment Editing](#). Updated assignment logic gives you greater freedom to manage assignments. Now, you can end future recurrences of assignments, delete assignments that have not been completed, and change notification options for in progress assignments.
- **Grid Updates**. Updated grids throughout the LSMS provide you with clearer and more concise information. We have updated grids on the following pages:
  - **Home**: You can quickly see the start date now in the Assignment panel.
  - **Organization Directory**: A new status column displays each user's status (Active or Inactive).
  - **Training Library**: The Assignment view now displays a Created by column, allowing you to see who created an assignment.
- **Library State Retention**. The Training Library retains its state now. As a result, if you use the back button, the system remembers your search, filters, sorting, and other options when you return to the page.

## Verify Minimum System Requirements

Prior to logging in to the PureSafety LSMS Enterprise, it is recommended that you follow the instructions in this task to review the minimum and recommended system requirements.

1. On the PureSafety Login page, click the [View Minimum Requirements](#) link. The Minimum Requirements page appears. This page is divided into the following sections:
  - **My System**. This section lists information about your browser settings, your computer settings, and whether recommended plug-in applications are installed.

- **Minimum Requirements.** This section lists the minimum and recommended requirements needed to operate the system.
- **Contact Information.** If you have a question about the recommended minimum requirements, use this section to contact customer support. All required fields have a red asterisk.

2. Click **Submit** when you are done.

## Contact PureSafety

### Customer Support

---

Contact PureSafety customer support via e-mail [support@puresafety.com](mailto:support@puresafety.com) or by phone at 888.202.3018.

### Other Resources

---

#### ***PureSafety - Corporate Headquarters***

730 Cool Springs Blvd, Suite 400 ([View Map and Directions](#))

Franklin, TN 37067

Main: 615-367-4404

US Toll-Free: 888-202-3016

Fax: 615-367-3887

PureSafety Customer Support: 888-202-3018

#### ***Department E-Mail***

General: [info@puresafety.com](mailto:info@puresafety.com) or [Click Here](#)

Accounting: [joe.simmons@puresafety.com](mailto:joe.simmons@puresafety.com) or [Click Here](#)

Sales: [sales@puresafety.com](mailto:sales@puresafety.com) or [Click Here](#)

Business Development: [partners@puresafety.com](mailto:partners@puresafety.com) or [Click Here](#)

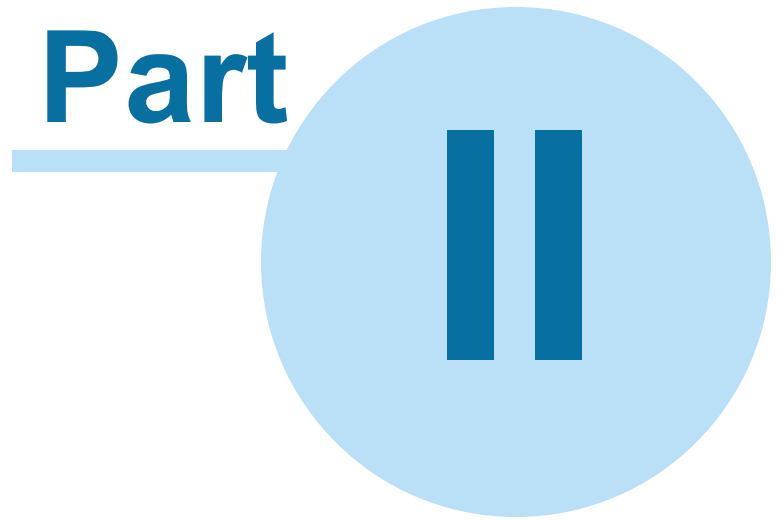
Marketing/Media Relations: [partners@puresafety.com](mailto:partners@puresafety.com) or [Click Here](#)

Partners: [partners@puresafety.com](mailto:partners@puresafety.com) or [Click Here](#)

Support: [support@puresafety.com](mailto:support@puresafety.com) or [Click Here](#)

Documentation: [documentation@puresafety.com](mailto:documentation@puresafety.com) or [Click Here](#)

**Part**



**Learning the Basics of  
LSMS Enterprise**

## Learning the Basics of LSMS Enterprise

This section includes step-by-step instructions for the first few tasks you need to perform when you start using the LSMS.

### Log in to LSMS Enterprise

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

The Login page allows users to gain access to the Learning and Safety Management System (LSMS). All users attempting to log in must have a user account with a valid set of credentials. For details about maintaining users' accounts, refer to the [Maintain Employees](#) topic. After the first login, the system remembers the company name for the user. If a user remains inactive for 30 minutes, the system automatically times out.

1. In the **Address** field of your Internet browser, enter the following link: <http://lsms.puresafety.com/>. The PureSafety LSMS Enterprise Login page appears.



Once you access the PureSafety LSMS Enterprise Login page for the first time, we recommend you add it to your browser's favorites.

2. In the **Language** drop-down menu, select the language that best suits your needs. This setting controls the language of the fields and other information in the user interface; it does not change the language of training courses.
3. In the **Company Name** field, enter the client name of your company.
4. In the **User Name** field, enter the user account name that has been set up for you.
5. In the **Password** field, enter the password that has been set up for the user name. This field is case sensitive.
6. Click **Log In**. The Dashboard page appears.

Note: On first login, please proceed to the **Settings** tab and provide a **Security Question and Answer**.

The screenshot shows a dark blue login form with the following elements: a 'Language' dropdown menu set to 'English', three text input fields labeled 'Company Name', 'User Name', and 'Password', and a 'Log In' button on the right.

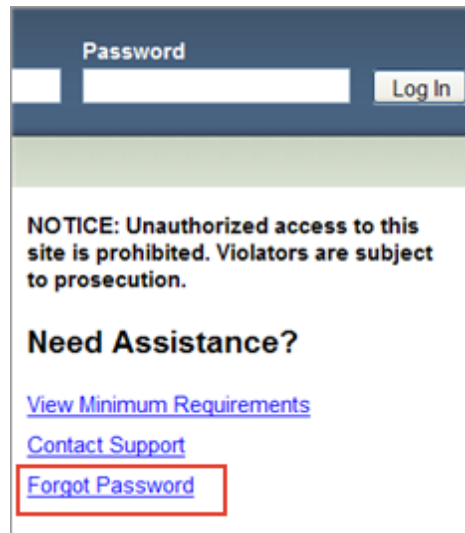
Login fields

### Reset a Forgotten Password

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

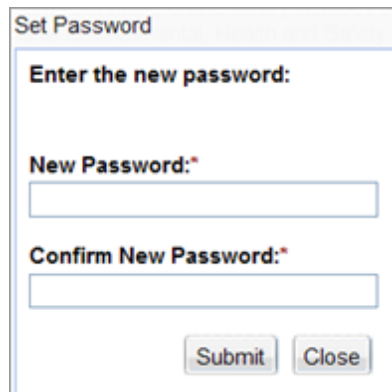
If you set up your security question on first login and forget your password, contact your system administrator to have your password reset. If he can't reset it, contact PureSafety customer support.

1. On the LSMS Login page, under **Need Assistance?**, click the **Forgot Password** link. The Forgot Password dialog box appears.



*Forgot Password link*

2. In the **Company Name** field, enter your company name.
3. In the **User Name** field, enter your user name.
4. From the **Security Question** drop-down, select your security question.
5. In the **Answer** field, enter the correct answer.
6. Click **Submit**. The Set Password dialog box appears.
7. In the **New Password** field, enter a password.
8. In the **Confirm New Password** field, re-enter the password.



*Set Password window*

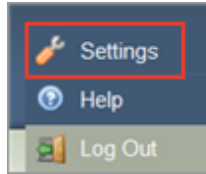
9. Click **Submit**. The Login page appears.

## Configure User Settings

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

As an LSMS user, you can define specific settings that apply to your LSMS session only. The Settings option allows you to change your password and time zone setting. At any point, you can change any of these settings to meet your needs.

1. Click the **Settings** link in the menu bar. The Settings Management page appears.



*Settings link*

2. If you want to change your password, complete the following steps.
  - a. In the **Old Password** field, enter your current password.
  - b. In the **New Password** field, enter the password you will use going forward. This field is case sensitive.
  - c. In the **Confirm New Password** field, reenter your new password.
3. If you want to change the default language preference, use the drop-down list in the **Culture** field to select the desired language.
4. If you want to change the time zone setting for your LSMS session, use the drop-down list in the **Time Zone** field to select the desired time zone.
5. If you want to change the security question, complete the following steps.
  - a. In the **Security Question** drip-down, select a question.
  - b. In the **Security Answer** field, enter your answer.
6. Click **Save**. The user settings are instantly applied to your LSMS session.

### Settings Management

**Old Password**

**New Password**

**Confirm New Password**

**Culture**  
English ▾

**Time Zone**  
Central Standard Time ▾

**Security Question\***  
What is your mother's maiden name? ▾

**Security Answer\***

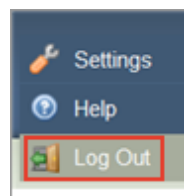
---

*Settings Management window*

## Log Out of LSMS Enterprise

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

Logging out of LSMS Enterprise ends a user's session in the system without closing the browser. Click the **Log Out** link in the menu bar. The current session ends and the support defined page appears.

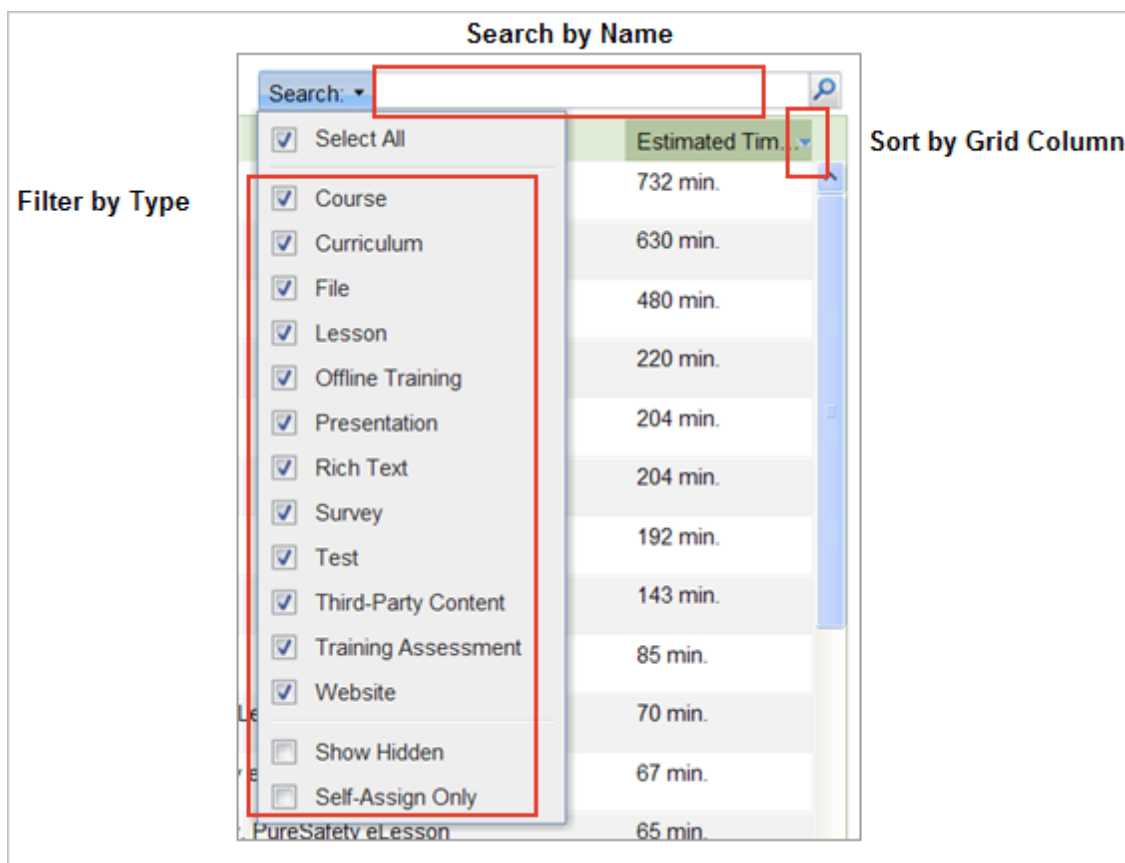


*Log Out link*

## Use the Search Feature

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

Throughout the LSMS, users have the ability to sort, search, and apply filters on grids. The search feature appears on various pages throughout the system, such as the Organization Directory and Training Library. The grids list the subject matter related to the page.

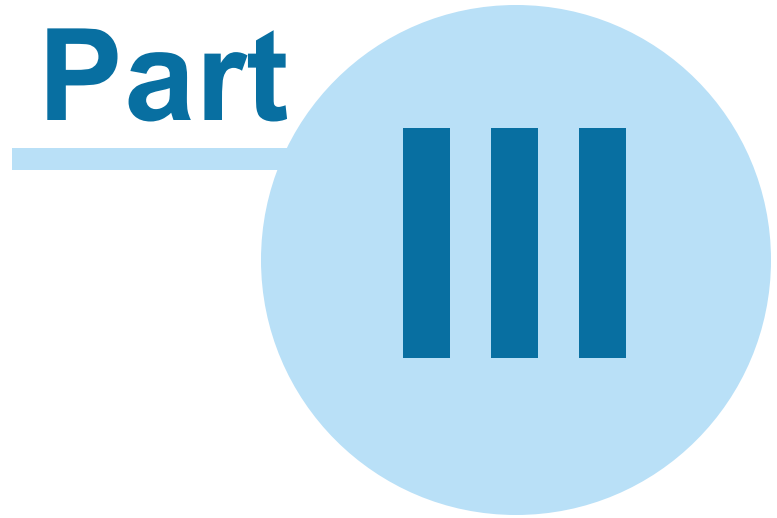


Using Search feature

- **Search by Name.** Search fields are located above grids to allow users to search for specific names or titles related to the grid display. For example, a search field is located above the Training Library grid. Enter any part of a name or title, such as exposure, and click the magnifying glass in the search field. The system displays training units with the word "exposure" in the title.
- **Filter by Type.** Grids allow users to filter data. By clicking the word Search, users can select a specific training type. The system displays only items that meet the chosen criteria. For example, on the Training Library grid, a user can click the drop-down menu and choose to see only training units of the Test type. As a result, the grid displays only test training units.
- **Sort by Grid Column.** Grids may contain more than one column of information. Column titles may include title, type, name, employee ID, and format. In most cases, users can sort by columns to group like items. Users can also add or remove columns when applicable.



**Part**



# **Understanding the Home Page**

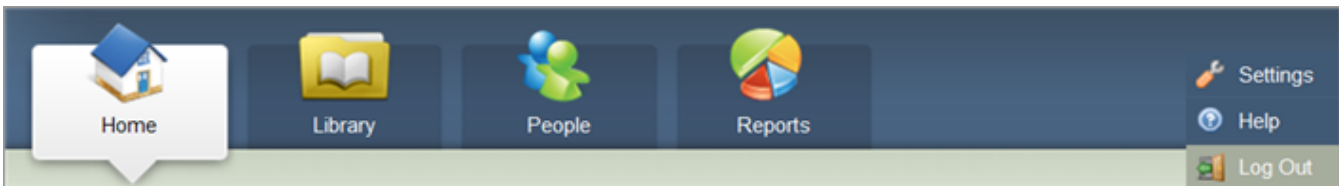
## Understanding the Home Page

The Home page is a collection of several panels making up a dashboard. Each panel is an object the user can interact with; also, sections display information specific to each user. From the Home page, users can take training, send and receive messages to other users, view recently accessed items, and see upcoming assignments on the calendar. Depending on a user's permissions, the menu bar offers links to other areas of the system, such as the Training Library and Organization Directory.

### Use the Menu Bar

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

The menu bar is a fixed bar that appears on most pages in the Learning and Safety Management System (LSMS). Each link on the menu bar provides access to various management functionalities in the LSMS and allows the user to navigate quickly through the LSMS.



Menu bar

#### Home

This item navigates to the Home page where users can access Assignments, Messages, and the Assignment Calendar. For more details, refer to the [Understanding the Home Page](#) topic.

#### Library

This item navigates to the Training Library page where users can access the Training Library, which is a list of all available training content ([Training Units](#), [Lesson](#), [Course](#), and [Curriculum](#)), and [Assignments](#), which is a list of all existing assignments. For more details, refer to the [Understanding the Training Library](#) topic.

#### People

This item navigates to the Organization Directory page where users can view the [Organizational Directory](#), [Employees](#), and [Security Roles](#). From those links, users can work with the hierarchy, collect company and employee information, and manage user accounts. For more details, refer to the [Understanding the Organization Directory](#) topic.

#### Reports

This item navigates to the Reports page where users can view a list of reports and a description for each. Users can run reports from by selecting the desired report. In addition, the user can view the date the report was last run and schedule reports. For information more details, refer to the [Understanding the Reports Directory](#) topic.

#### Settings

This item navigates to the Settings Management page where users can change their password. For more details, refer to the [Configure User Settings](#) topic.

#### Log Out

This item ends a user's session in the LSMS and navigates back to the Log In page. For more details, refer to the [Log Out of LSMS Enterprise](#) topic.

## Learn About the Home Page

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

The Home page includes the following panels:

- **Assignments.** The Assignments section of the Dashboard contains all of your active, completed, and upcoming assignments. For more details, refer to the [Take Your Assignments](#) topic.
- **Messages.** This messaging system allows a user to compose and send a message to other users within the LSMS. For more details, refer to the [Manage Your Messages](#) topic.
- **Last Items Accessed.** The Last Items Accessed panel on the Home page displays the last five items a user viewed during previous sessions. The items include training, assignments and reports. Each item contains a link back to the item's details.
- **Certifications.** The Certification panel displays certifications assigned to the user. The window also displays the certification name, status, expiration date, and whether it is required.

Home page

## Take Your Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

The Assignments section of the Dashboard contains all of your active, completed, and upcoming assignments. The drop down menu above the Assignment sections allows you to chose Active, Completed, or Upcoming assignments.

Home Page (Assignments)

- Active assignments are those with a Start Date of today, or any prior date, that have not been completed. By

default, the Assignments section displays all current assignments. Double-clicking an item from the list launches the assignment directly from the Home page.

- Completed assignments are those that you have taken and successfully completed.
- Upcoming assignments are those that will begin in the future and are not yet active.

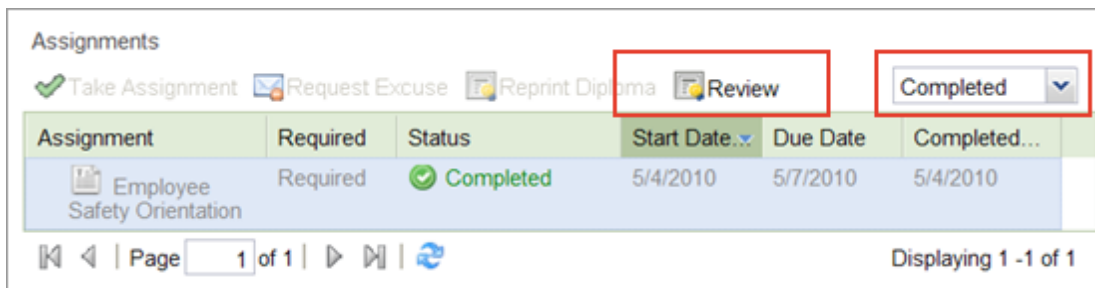
1. Click **Home** in the menu bar. The Dashboard page appears.
2. In the **Assignments** section, highlight the desired training and click **Take Assignment**. Or double-click the desired training. The selected training is opened.
  - If an assignment is started and not completed, the assignment displays a status of In Progress.
  - When an assignment is completed, it is moved to the Completed view of the Assignments window.

## Review Your Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

The Review option allows you to review training that you have completed in the past. Not all training is reviewable. For example, once a test has been completed, it cannot be reviewed. The Review button is disabled for training that cannot be reviewed. This task includes instructions for reviewing.

1. From the Home page, select the **Completed** view from the **Assignment** panel. The Completed view appears.
2. Click the desired completed training. The Review option is enabled.



Review completed assignments

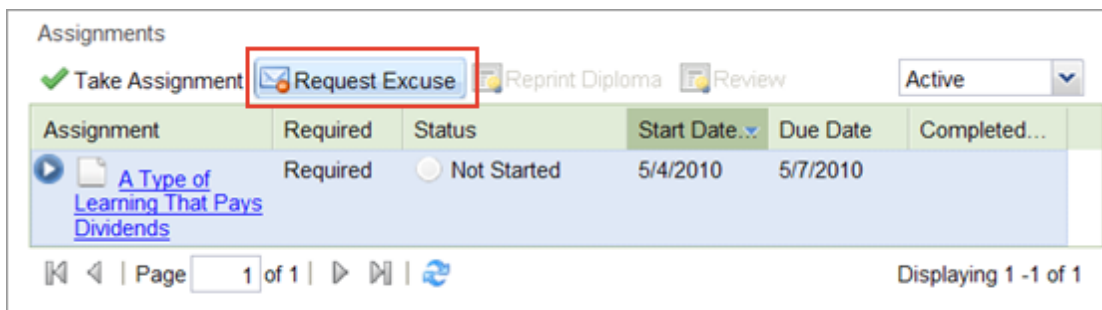
3. Select **Review**. The selected training opens.

## Request Excuse

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

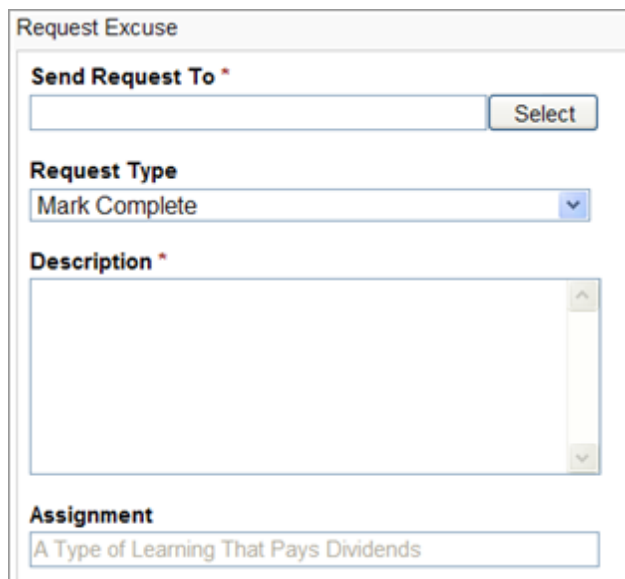
The Request Excuse feature allows a user to send a request to an administrator requesting to be excused or marked complete for an assignment.

1. Click **Home** in the menu bar. The Dashboard page appears.



Requesting excuse from an assignment

2. In the **Assignments** section, highlight the desired training and click **Request Excuse**. The Request Excuse popup window appears. Note: The Request Excuse option is not available until a training has been highlighted.
  - a. **Send Request To**: Defaults to the assignment creator, but you can change it to any administrator with permissions to grant excuse.
  - b. **Select Request Type**: Mark Complete or Excuse.
  - c. Add a **Description**.
3. Select **Send**. The request is sent to the administrator. Once the request is approved, the training is automatically moved to the Completed page.



Request Excuse window

## Reprint Diploma

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

The Reprint Diploma option is enabled by your Training Administrator. Diplomas are not offered for every assignment. If you are unable to print a diploma for an assignment, contact your Training Administrator for more details. This task includes instructions to reprint diplomas.

1. From the **Home** page, select the **Completed** view from the **Assignment** panel. The Completed view appears.
2. Click the desired completed assignment. The Reprint Diploma option is enabled.
3. Select **Reprint Diploma**. The diploma appears as a PDF.



Reprint Diploma

## Manage Your Messages

The LSMS offers an internal messaging system. This messaging system allows a user to compose and send a message to other users within the LSMS.



**Users cannot send messages to anyone who doesn't have an employee profile in the LSMS. Users may not send messages to anyone outside the LSMS.**

The Messages management page has three views for the user:

- **Inbox.** Displays new messages sent to the user. Users can quickly view their messages with information presented in these columns: From, Subject, and Received (date and time). Users may also sort their messages by any of the column headings.
- **Sent.** Displays messages sent by the user. Users can quickly view their sent messages with information presented in these columns: To, Subject, and Sent (date and time). Users may also sort their messages by any of the column headings.
- **Archived.** Displays messages the user has archived. Archived messages are messages the user no longer needs in the Inbox. Users may archive messages from their Inbox only. Once they archive them, users can view messages using information in the following columns: From, Subject, and Received (date and time). Users can also sort their messages by any of the column headings.

## View Your Messages

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

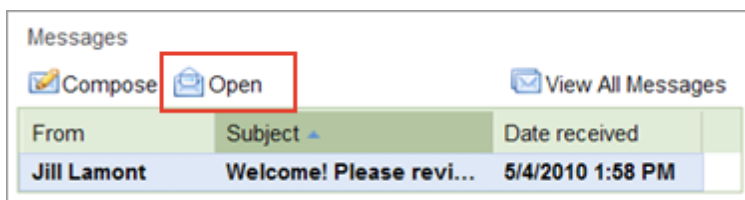
This task includes instructions for opening your messages.

### To open messages:

1. Click the **Home** link in the menu bar. The Dashboard page appears.

2. In the **Messages** section, highlight the desired message and select **Open**. Or, double-click the desired message. The page is refreshed and the selected message opens. From this page you can perform the following tasks: [Reply](#), [Reply All](#), [Forward](#), and [Archive](#) from the **Actions** menu.

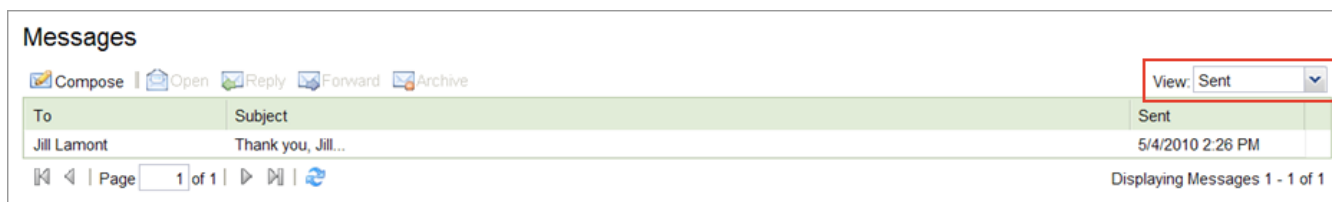
Note: You can also open a message by selecting **Messages > View All Messages > Open**.



*Opening a message*

### To view sent messages:

1. Click the **Home** link in the menu bar. The Dashboard page appears.
2. In the **Messages** section, click the **View All Messages** link. The Messages page appears.
3. In the **View** field, use the drop-down list to select **Sent**. The page is refreshed and all of your sent messages are displayed.



*Viewing sent messages*

## Compose Messages

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

The Messages section enables you to send and receive messages from other users.

1. Click the **Home** link in the menu bar. The Dashboard page appears.
2. In the **Messages** section, click **Compose**. The Compose Message page appears.

Note: You can also access the Compose Message page from the Dashboard page by selecting **Messages > View All Messages > Compose**.

3. In the **To** (require) field, click **Add**. The Add People popup window appears.
  - a. Select a message recipient by clicking the check box beside the user's name. You can select as many recipients as desired.
  - b. After selecting the desired recipients, click Add. The selected recipients are listed in the To field on the Compose Message page. If you want to remove a recipient, highlight the recipient's name and click **Remove**.
4. In the **Subject** field, enter the subject of the message.

5. In the **Message** field, enter the desired message. You can use the formatting toolbar to format the content of the message as desired.
6. Click **Send**. The message is sent to the selected recipients.

**Compose Message**

**To\***

+ Add - Remove

Type	Name
	Lamont, Jill Karen

**Subject**

I have a question about our safety training...

**Message**

Arial | **B** *I* U | A<sup>^</sup> A<sub>^</sub> | A (color) | [List icons] | [Link icon]

My question is...

Composing a message

## Reply to Messages

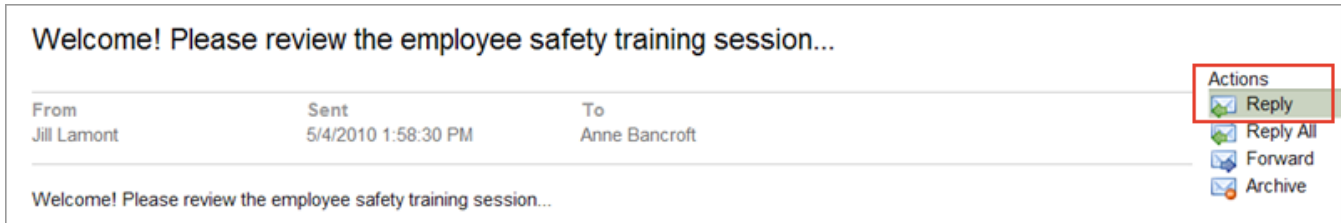
Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

This task includes instructions for replying to messages.

1. Click the **Home** link in the menu bar. The Dashboard page appears.
2. In the **Messages** section, click the **View All Messages** link. The Messages page appears.

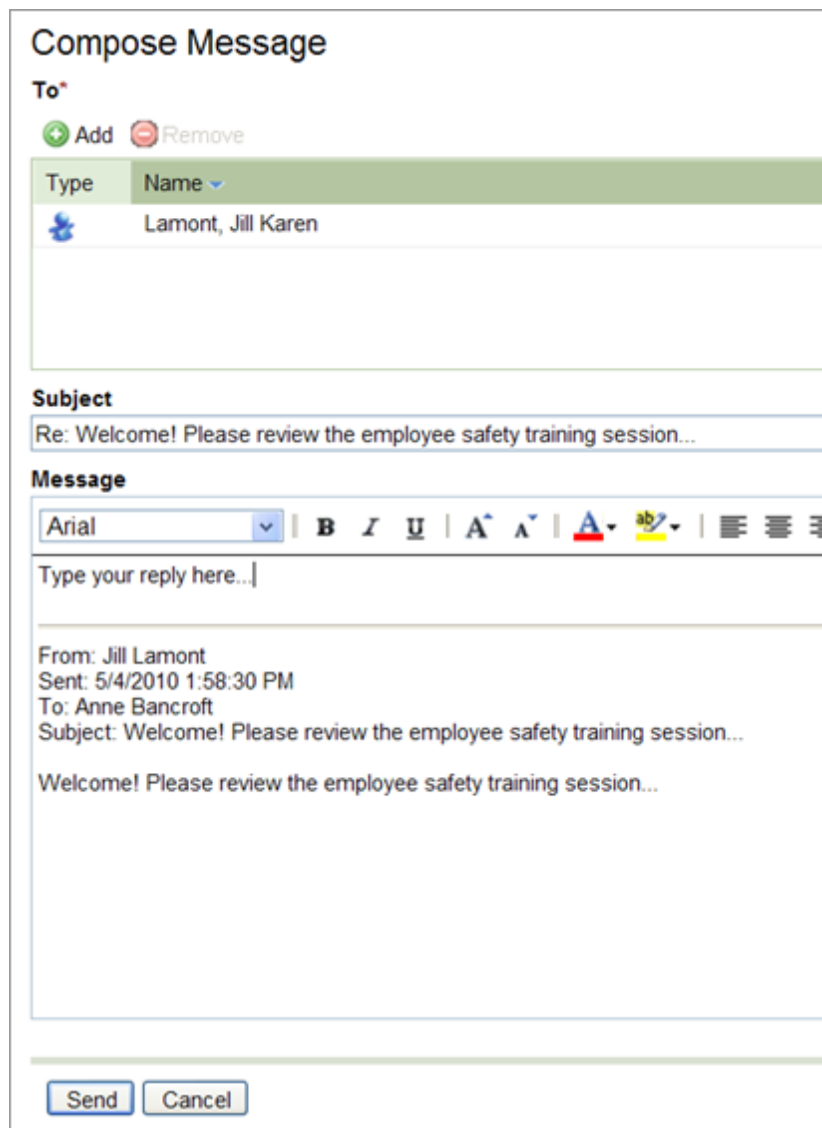


3. Highlight the desired message and click **Reply**. The selected message appears in the Compose Message page. By default, the **To** field is automatically populated with the user who sent the original message.



*Reply link*

4. In the **Message** field, enter the desired message.
5. Click **Send**. Your reply message is sent to the original sender.



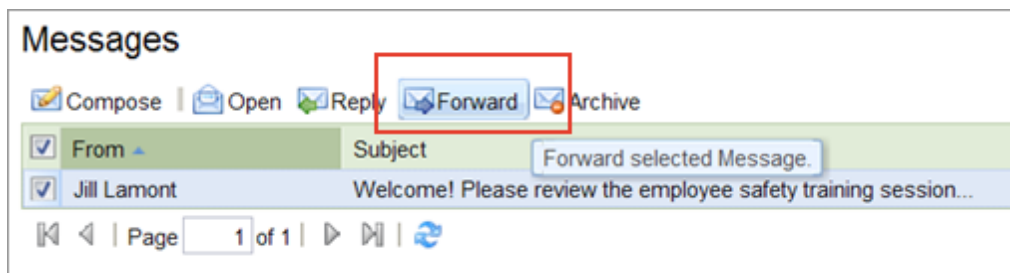
*Composing a message*

## Forward Messages

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

This task includes instructions for replying to messages.

1. Click the **Home** link in the menu bar. The Dashboard page appears.
2. In the **Messages** section, click the **View All Messages** link. The Messages page appears.
3. Highlight the desired message and click **Forward**. The selected message appears in the Compose Message page.



*Forward button*

4. In the **To** field, click **Add**. The People Selection popup window appears.
  - a. Select a message recipient by clicking the check box beside the user's name. You can select as many recipients as desired.
  - b. After selecting the desired recipients, click **Add**. The selected recipients are listed in the **To** field on the Compose Message page. If you want to remove a recipient, highlight the recipient's name and click **Remove**.
5. In the **Message** field, enter the desired message.
6. Click **Send**. Your forwarded message is sent to the selected user.

### Compose Message

**To\***

+ Add - Remove

Type	Name

**Subject**

Fwd: Welcome! Please review the employee safety training session...

**Message**

Arial | **B** | *I* | U | A<sup>+</sup> | A<sup>-</sup> | A | ab | [List Icon]

Type your message here to forward...|

---

From: Jill Lamont  
 Sent: 5/4/2010 1:58:30 PM  
 To: Anne Bancroft  
 Subject: Welcome! Please review the employee safety training session...

Welcome! Please review the employee safety training session...

*Forwarding a message*

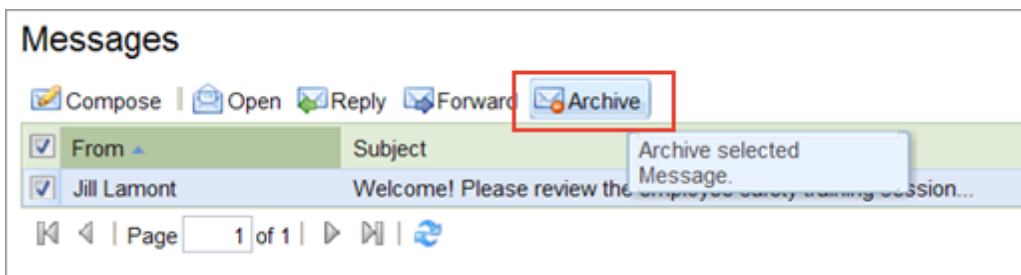
## Archive Messages

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

In order to manage your Inbox, you have the ability to archive messages. Once a message is archived, it can still be viewed.

### To archive messages:

1. Click the [Home](#) link in the menu bar. The Dashboard page appears.
2. In the [Messages](#) section, click the [View All Messages](#) link. The Messages page appears.
3. Highlight the desired message and click [Archive](#). The system archives the message and returns to the Messages page.



Archive button

**To view archived messages:**

1. Click the **Home** link in the menu bar. The Dashboard page appears.
2. In the **Messages** section, click the **View All Messages** link. The Messages page appears.
3. In the **View** field, use the drop-down list to select **Archived**. The page is refreshed to display all of your archived messages.

## Approve Requests

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators,
-----------------	--

An administrator with the correct permissions can approve requests for excuse from training. When a request excuse is created, it appears in the Messages Inbox with the subject "Pending Request."

1. Click the **Home** link in the menu bar. The Dashboard page appears.
2. In the **Messages** section, highlight the message with the subject "Pending Request" and select **Open**. The page is refreshed and displays the selected message.
3. Review the following details: From, Training, Begin Date, Due Date, Proposed Status and Comments.



Approve/Decline link

4. Under the Actions menu, select **Approve/Decline**. The Approve/Decline popup window appears.
5. In the **Status** field, use the drop-down list to select one of the following statuses: **Mark Complete**, **Mark Excused**, or **Deny Request**.
6. Select the **Assignment** as either **All** or individual **Training Units**.
7. Enter the **Time Spent** (optional).
8. Click **Submit** to approve/decline the request. The Trainee's assignment status will change based on approval.

Approve / Decline

**Status**  
Mark Excused

**Training Units**

Assignment	Status	Due	Time Spent
<input checked="" type="checkbox"/> A Type of Learning That Pays Divide...	In Progress	5/7/2010	0:00

*Approving requests*



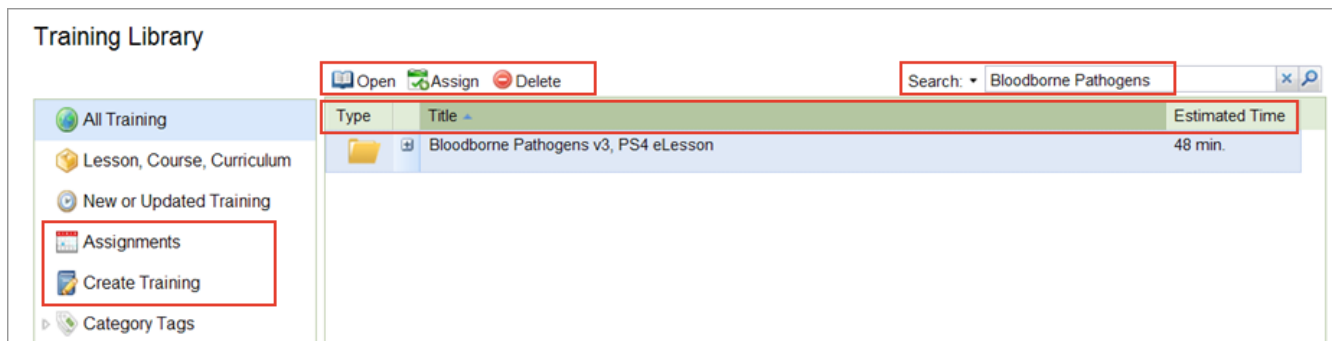
**Part**

**IV**

**Understanding the  
Training Library**

## Understanding the Training Library

The Training Library is a directory of all available training units. By default, the Training Library includes all PureSafety training content purchased by the client. In addition, you can create additional training content to meet the needs of your company.



Training Library

A training unit is the smallest piece of training content. It can be a presentation, test, survey, rich-text document, third-party content, file, URL, offline training, or training assessment. For more details, refer to the [Manage Training Units](#) topic. If appropriate, training units can be assigned individually. However, if multiple training units contain similar or related information, they can be organized into a curriculum, course, or lesson. For more details, refer to the [Organize Training Units](#) topic.

Users may search for specific training units by entering the full or partial unit name in the search field. Users may also filter the Training Library by selecting the desired options in the Search drop-down list. The system displays only those types of training in the list. For more details, refer to the [Use the Search Feature](#). The Library displays the following:

- Type (for example, test, survey, reference)
- Title
- Estimated time to take training
- A brief description of the training appears below the training title
- Tags

An administrator can assign training to users. Administrators can classify the assignment as one-time, recurring, one-time series, recurring series, or a certification. For more details, refer to the [Manage Assignments](#) topic.

## Manage Training Units

A training unit is the smallest piece of training content and can be organized into a Curriculum, Course, or Lesson. A training unit contains various properties such as Title, Estimated Time, Version, Description, and Objectives. Examples could include the following:

- Documents of various files types—e.g., .pdf, .xls, .xlsx, .doc, .docx, .ppt
- Material Safety Data Sheet (MSDS)
- Test
- Survey

Users interact with the training unit to learn objectives established by the content. Training Units may come from



various sources. For example, training may be acquired from PureSafety (PS4) or by another third-party content provider. In other cases, companies may have their own Trainer, Curriculum Developer, or Instructional Designer to create its own content (tests, surveys, presentations) to suit its needs.

Another way to understand training units is whether it requires an instructor. An online training does not require an instructor-led environment to successfully complete and learn the objectives of the instruction. However, an offline training requires a instructor-led environment typically.

With PureSafety's Learning and Safety Management System (LSMS), users have the ability to combine both online and offline training in an assignment to build more effective learning scenarios.

---

## **Presentations (PS4)**

Presentations created by PureSafety use interactive items to enforce the learning experience such as videos, images, voice-overs, text, and quizzes. Users with permissions (trainers, training administrators) include PS4s in their assignments. Trainees with assignments that include PS4s use it to learn about the assigned subject matter. PureSafety's LSMS provides the native environment to get the most out of the experience provided by PS4s. Clients who subscribe to PureSafety's safety training and management solution are able to leverage the content and the reinforcement to help protect their workforce.

---

## **Tests**

Tests determine whether a training unit's objectives were satisfied. Typically, tests contain a series of questions used to gauge the learner's knowledge or ability after taking an online or offline training. In LSMS, there are two types of tests: pretest and standard. Typically, place pretests before the instruction and place standard tests after the instruction.

Pretests determine whether a student is sufficiently prepared or is excusable from an assignment. Standard tests determine whether the student understands and meets the objectives set out in a body of instruction.

---

## **Surveys**

Surveys help with statistical studies of a sample population by asking user-defined questions. In LSMS, surveys differ from tests in that there are no correct or incorrect answers.

---

## **Training Assessments**

Training Assessments determine what training an employee needs to take. Training Assessments are a series of questions and answers created by an administrator in a survey format. The administrator associates training with the answers. When an employee takes the Training Assessment, additional training is assigned based on the answers selected.

---

## **External Training Resources**

References describe a source of information. This source of information is relevant to, or is in connection with, a particular subject. LSMS handles three types of references: URL, Rich-Text Document, and File. Below are examples of each type of reference.

- Website or Uniform Resource Locator (URL), e.g., <http://www.puresafety.com/> is a URL

Example: A company publishes its MSDS to identify toxicity of certain prescription medications. The company publishes its tests for acetaminophen and tricyclic antidepressants via an internal Web site.

- Rich-Text Document

Example: A company publishes its HR-related policies using rich-text documents. If there are any changes to this policy, the company can update their policies easily.

- File

Example: A company uploads a Word based job aid called, "Respiratory Protection," as part of its employee training.

## Third-Party Content

---

Third-Party Content describes online training content purchased from a company other than PureSafety. LSMS handles both industry standards, AICC and SCORM.

- AICC content follows training standards established by the Aviation Industry CBT Committee. (For additional information about AICC, refer to <http://www.aicc.org/>.)
- SCORM content follows training standards sponsored by the Office of the Under Secretary of Defense for Personnel and Readiness (OUSD P&R). (For additional information about SCORM, refer to <http://www.adlnet.gov/>.)

## Offline Training

---

Offline Training is instruction requiring an instructor-led environment. An example of an offline training may be classes for Cardio Pulmonary Resuscitation (CPR) and Automated External Defibrillator (AED) where a "live" instructor would enhance the learning objectives of these lifesaving requirements. In LSMS, offline training has the following properties:

- Title - Use this field to name and identify the offline training. For example, "CPR/AED".
- Description - Use this field to provide a description relevant to the offline training. For example: "Designed for the Professional Rescuer, this class covers the basics of Cardio Pulmonary Resuscitation, foreign body airway obstruction (Heimlich Maneuver), use of an Automated External Defibrillator. Will satisfy any job or school requirement for CPR and First Aid."
- Available Sessions - Use this functionality to add, edit, or remove sessions.

In LSMS, offline training must have at least one session. Users with permission to create an offline training (e.g., Instructors, Trainers, or Training Administrators) need to create its sessions. Sessions are scheduled events at a physical location, and users can create as many sessions to suit their training needs. LSMS provides the ability to schedule sessions to manage multiple occurrences of an offline training. For example, a user may need to create three CPR/AED classes this Saturday at 10:00 AM, 1:00 PM, and 3:00 PM, held in Building A, Room 10. In this example, each scheduled class represents a session in LSMS.

In LSMS, sessions have the following properties:

- Date - The date on which the session occurs. This field uses the MM/DD/YYYY format. For example, '03/08/2014'.
- Time - The time at which the session occurs. This field uses HH/MM AM/PM format. For example, '10:00 AM', '01:00 PM', '03:00 PM'.
- Expected Duration - The period of time, in minutes, that a session lasts. For example, '60' (minutes).
- Maximum Attendees - The largest number of participants possible or allowed. For example, '10'. (Note that each session may vary in maximum attendees.)
- Instructions - Additional description or instruction for this session. For example, use this field to provide directions, pre-requisite supplies, etc.

LSMS does not allow a user to successfully create an offline training without sessions. Therefore, in order to create an offline training, an instructor (Trainer or Training Administrator) must create connecting sessions. Once an offline training exists in the LSMS, only then can they be included in an assignment. (Note that sessions are not assignments.)

Once a user with permissions assigns an offline training, it is ready for enrollment. The Administrator can decide if users have the ability to register for themselves or the Administrator can register user. Users (e.g., trainees, students) can only sign up for a session that is open. A session that reaches the specified number of maximum attendees does not allow additional users to enroll.

## Create Tests

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

Tests provide a way to measure a trainees knowledge of a particular topic or the material presented. In addition to creating standalone test in the LSMS, you can also create tests within the Content Creation System (CCS) that can be embedded into presentations. This task includes instructions for creating tests.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Build Training** section, click **Test**. The Create a Test page appears.
4. In the **Title** field, enter a title or name for the test. An entry in this field is required.
5. The **Description** field is used to enter a description of the test. If you enter a description in this field, it appears below the test title in the Training Library.
6. In the **Minimum Passing Score** field, enter the minimum percentage required to pass the test. By default, 70% is the minimum passing score which can be changed.
7. By default, the test questions appear in sequential order. If you want the questions to appear in random order, select the **Randomize Questions** check box.
8. If you want to provide trainees with explanations of the answers, select the **Show Answer Explanations** check box.
9. If you want to give trainees the ability to retake only the questions they missed, select the **Retake Failed Questions Only** check box.
10. By default, trainees are given all the questions in the test. If desired, you can use the **Presented Number of Questions** field to limit the number of questions in the test by selecting the Limit radio button and entering the desired number of questions.
11. By default, trainees attempt a test an unlimited number of times until they have passed. If you want limit the number of attempts for a test, select the **Limit to \_\_\_ Attempts** radio button and enter the desired number in the blank field.

### Create a Test

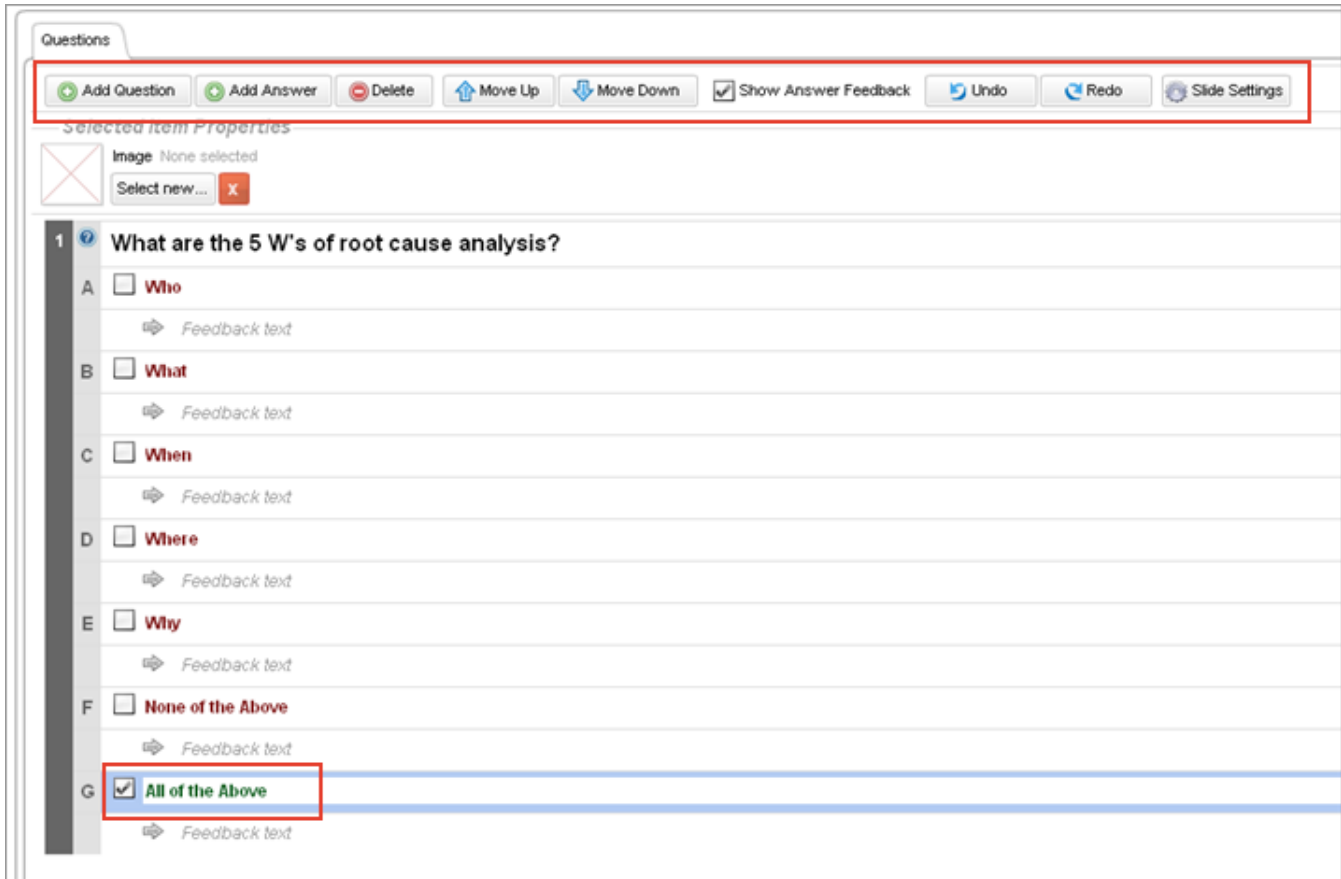
**Title\***

**Description**

<p><b>Minimum Passing Score</b></p> <input style="width: 50px; border: 1px solid #ccc;" type="text" value="70"/> <p><b>Show Answer Explanations</b></p> <input type="checkbox"/> <p><b>Presented Number of Questions</b></p> <p><input checked="" type="radio"/> All</p> <p><input type="radio"/> Limit <input style="width: 50px; border: 1px solid #ccc;" type="text"/></p>	<p><b>Randomize Questions</b></p> <input type="checkbox"/> <p><b>Retake Failed Questions Only</b></p> <input type="checkbox"/> <p><b>Number of Attempts</b></p> <p><input checked="" type="radio"/> Unlimited</p> <p><input type="radio"/> Limit to <input style="width: 50px; border: 1px solid #ccc;" type="text"/> attempts</p>
---	--

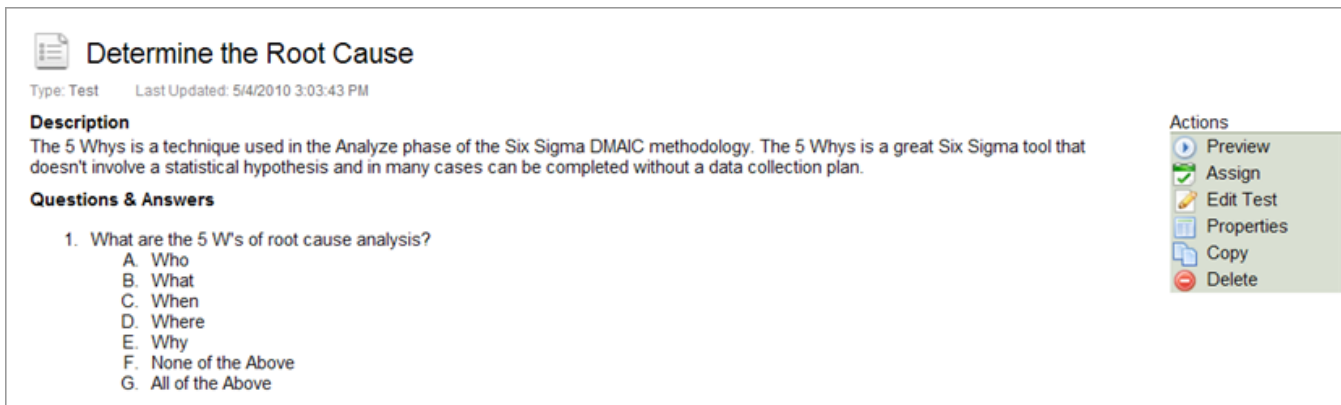
*Creating a test*

12. Click **Create**. The new test is created and opened in the Content Editor.
13. Click the **Add Question** button to create questions for the test. Refer to the Add Questions to Quizzes topic in the CCS documentation for detailed instructions.
14. Click the **Add Answer** button to enter answers for the question. Refer to the Create Answers for Questions topic in the CCS documentation for detailed instructions.
15. To rearrange the order of questions, refer to the Rearrange the Order of Questions topic in the CCS documentation. To rearrange the order of answers, refer to the Rearrange the Order of Answers topic in the CCS documentation.
16. Click the **Slide Settings** button to define introductory text for the test, an exit statement for the test, and insert an image with the test. Refer to the Define Quiz Settings topic in the CCS documentation for detailed instructions.



Adding test questions and answers

17. After designing the test, click **Save**. The test is saved and listed on the Training Library page.



Saving a test

## Create Surveys

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating surveys.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Build Training** section, click **Survey**. The Create a Survey page appears, provide the following information, where applicable:
4. In the **Title** field, enter a title or name for the survey. An entry in this field is required.
5. The **Description** field is used to enter a description of the survey. If you enter a description in this field, it appears below the test title in the Training Library.
6. Click **Create**. The new survey is created and opened in the Survey Editor.

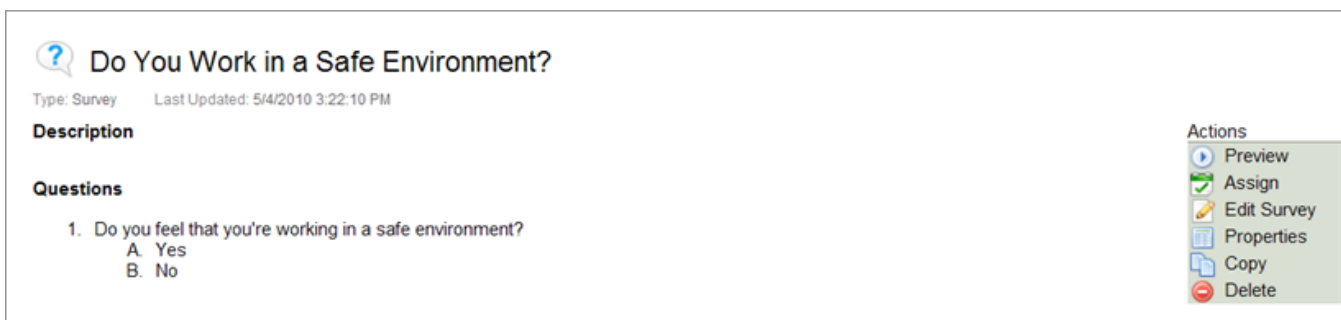
*Creating a survey*

7. The user can now add questions and answers to the survey.

*Creating a survey in CCS*

8. Provide a **Question**.

- a. Click **Add Question**.
  - b. Select the **Multiple Choice** or **Open-Ended** radio button.
    - Note: Multiple choice questions do not contain incorrect answers.
  - c. Provide a question in the **Question** text box.
9. If multiple choice, provide an **Answer**.
- a. Click **Add Answer**.
  - b. Provide an answer in the **Answer** text box.
    - i. Repeat steps 1 and 2 to create as many possible answers for each question as desired.
  - c. All answers default to correct.
  - d. Select the **Show Answer Feedback** checkbox.
    - i. Select **Show Answer Feedback**, optional. Answer Feedback is a message displayed to a trainee following the selection of an answer within a Survey.
  - e. Provide an answer feedback in the **Feedback** text box.
  - f. Once the answer feedback text box fields are populated, uncheck the **Show Answer Feedback** checkbox will hide the feedback, but will not delete it.
  - g. Delete a **Question/Answer/Feedback**, optional.
    - i. On the **Survey Editor** page, select the question, answer, or feedback to be deleted.
    - ii. Select **Delete**.
  - h. Click the **Slide Settings** button to define introductory text for the test, an exit statement for the test, and insert an image with the test. Refer to the Define Quiz Settings topic in the CCS documentation for detailed instructions.
10. Selecting **Save** saves the survey.



*Saving a survey*

## Create Training Assessments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes steps for creating training assessments.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Build Training** section, click **Training Assessment**.

**Create a Training Assessment**

**Title\***  
How to Create a Training Assessment

**Description**  
This training assessment helps you determine what training you need...

**Questions and Trainings**

Name

Q Do you work with arsenic?

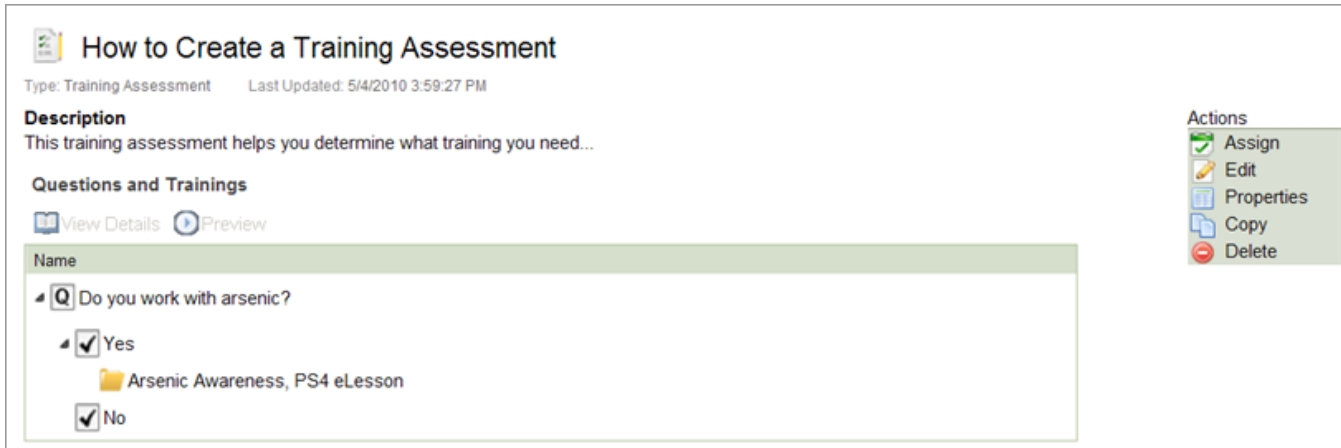
Yes  
     Arsenic Awareness, PS4 eLesson  
 No

*Creating a training assessment*

4. On the **Create a Training Assessment** page, provide the following information, where applicable:
  - a. Title (required)
  - b. Description
5. The user can now add questions and answers to the training assessment.
  - a. Click on **Add Question**. The Add Question dialog box appears.
  - b. Provide a question in the **Question** text box. By default two answer text boxes will appear.
  - c. Click on **Add Answer** when more answer options are needed. Provide an answer in the **Answer** text box. Two answers are required for each question. Repeat step 2 to create as many questions and answers as desired.
6. The user can now associate training to the question and answer options as desired.
  - a. Highlight a question, click on **Add Training**. The Add Training dialog box opens.
  - b. Select or highlight the answer to which you want to associate training. By default, it will associate that training to the first answer.



- c. Select training to be associated with the answers as desired. Note: Users are not required to associate training to answers.
  - d. Selecting **Add** saves the training associations.
7. Selecting **Create** creates the Training Assessment.



*Training Assessment screen*

## Create Rich-Text Documents

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for building a presentation, test, survey, rich-text document, reference, third-party package, and offline training.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Build Training** section, click **Rich-Text**. The Create Rich Text page appears.

### Create Rich Text

**Title\***

**Description**

The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The 5 Whys is a great Six Sigma tool that doesn't involve a statistical hypothesis and in many cases can be completed without a data collection plan.

**Content\***

Arial | **B** | *I* | U | A<sup>+</sup> | A<sup>-</sup> | A<sup>+</sup> | | | | | | |

The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The 5 Whys is a great Six Sigma tool that doesn't involve a statistical hypothesis and in many cases can be completed without a data collection plan. Asking "Why?" may be a favorite technique of your three year old child in driving you crazy, but it could teach you a valuable Six Sigma quality lesson. The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. It's a great Six Sigma tool that doesn't involve data segmentation, hypothesis testing, regression or other advanced statistical tools, and in many cases can be completed without a data collection plan.

By repeatedly asking the question "Why" (five is a good rule of thumb), you can peel away the layers of symptoms which can lead to the root cause of a problem. Very often the ostensible reason for a problem will lead you to another question. Although this technique is called "5 Whys," you may find that you will need to ask the question fewer or more times than five before you find the issue related to a problem.

Create Rich Text screen

4. Enter a **Title** (required), **Description**, and **Content**.
5. Enter text/HTML with formatting options.
6. Select **Create**. The new rich-text is created and is listed on the Training Library page.

## Create a File or Website Training

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for building file or website links for training.

### To create a file:

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Reference External Resources** section, click **File**.
4. On the **Create File** page, provide the following information, where applicable:
  - a. Title (required)
  - b. Description
  - c. Select Browse to navigate and select desired file.

5. Select **Create** to save the file reference.

### Create File

**Title\***

**Description**

**File\***


---

*Creating a file*

### To create a website:

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Reference External Resources** section, click **Website**.
4. On the **Create Website** page, provide the following information, where applicable:
  - a. Title (required)
  - b. Description
  - c. Website URL (required)
5. Select **Create** to save the Website training.

Create Website	
<b>Title*</b>	Determine The Root Cause: 5 Whys
<b>Description</b>	The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The tool that doesn't involve a statistical hypothesis and in many cases can be completed without a data collection plan. Asking "Why?" may be a favorite technique of your three year old child in driving you crazy, but it is a Six Sigma quality lesson. The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The 5 Whys is a Six Sigma tool that doesn't involve data segmentation, hypothesis testing, regression or other advanced statistical tools. In many cases can be completed without a data collection plan.
<b>Website URL*</b>	http://www.isixsigma.com/index.php?option=com_k2&view=item&id=1308:&Itemid=49
<input type="button" value="Create"/> <input type="button" value="Cancel"/>	

*Creating a website*

## Create Third-Party Training

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for building third-party packages.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Reference External Resources** section, click **Third-Party Content**.
4. On the **Upload Third Party Content** page, do the following, where applicable:
  - a. Select **Browse** to navigate to the file location.
  - b. A title will be uploaded into the **Title** field, edit as necessary.
  - c. Provide the estimated time (in minutes) to complete the training in the **Estimated Time** field, an optional field.
  - d. A version number will be uploaded in the **Version** field, (optional), edit as necessary.
  - e. Provide a description of the training in the **Description** field, an optional field.
5. Selecting **Create** will create the Third-Party Package.

## Create Offline Training

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for building offline training.

1. Click **Library** in the menu bar. The Training Library appears.

2. In the left panel, click **Create Training**. The Create Training view appears.
3. In the **Reference External Resources** section, click **Offline Training**.

### Create a New Offline Training

**Title\***

**Description**

**Available Sessions\***

Date ▲	Duration

**Users Can Self-Register**

*Creating a new offline training*

4. On the **Create a new Offline Training** page, provide the following information, where applicable:
  - a. Title (required)
  - b. Description
  - c. From the **Available Sessions** list, select **Add Session**.
  - d. In the **Session Properties** window, enter the following, where applicable:
    - i. Provide a date, required.
    - ii. Provide a time, required.

- iii. Provide a duration in minutes, optional.
  - iv. Provide the maximum number of attendees allowed in the class, optional.
  - v. Provide any further details, such as location or instructor in the Details text box.
  - vi. Select **OK** to save the session properties.
5. Check the box, **Users Can Self-Register**, if trainees should be able to register for their own session.

The screenshot shows a 'Session Properties' dialog box with the following fields and options:

- Date:** 05/04/2010
- Time:** 04:00 PM
- Duration in Minutes:** 60
- Maximum Attendees:**  No Limit,  Limit To [ ]
- Details:** A large empty text area for additional information.

Offline Training Session Properties window

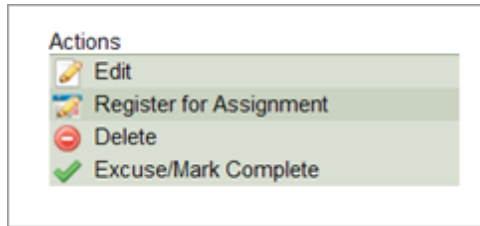
- 6. Select **Create** to save the Offline Training.

## Register Users for Offline Training

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

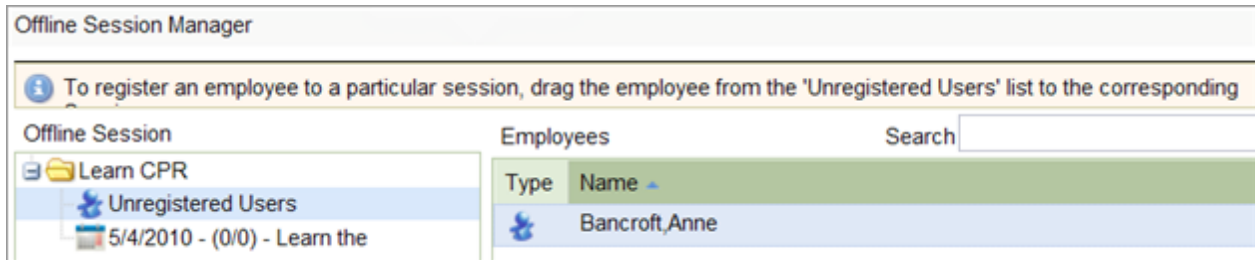
This task includes instructions for registering users for offline training.

1. Click **Library** in the menu bar. The Training Library appears.
2. Click **Assignments**, select the desired assignment containing an Offline Training. The Training Assignment Details page appears.
3. From **Actions**, select **Register for Assignment**. The Offline Session Manager appears.



Register for Assignment link

- From the list of **Unregistered Users**, drag and drop users into the desired session. Note: When dragging users into new sessions, the system updates the session automatically.



Offline Training Offline Session Manager window

- After adding all unregistered users to a session, click **Close**.

## Associate Documents to Offline Training

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for associating documents to offline training.

- Click **Library** in the menu bar. The Training Library appears.
- Search for the desired Offline Training, click **Open**. The selected offline training detail page appears.
- From Sessions, highlight the desired session, select **Manage Sessions**. The Session Assessment page appears.

**Learn CPR**  
Type: Offline    Last Updated: 5/4/2010 9:19:15 PM

**Description**  
Learn CPR is a free public service supported by the...

**Sessions**

**Manage Session** Manifest

Date	Duration	Openings	Maximum Attendees
5/4/2010 9:00 AM (Central Standard Time)	60	No Maximum	No Maximum

Details: Learn the basics of CPR - cardiopulmonary resuscitation. Updated with new CPR Guidelines issued by the American H...

**Users Can Self-Register**  
True

*Accessing Manage Session window*

4. Select **Browse**.
5. Find the associated file and select **Open**.

**Learn CPR Session Assessment**  
Date: 5/4/2010 9:00:00 AM (Central Standard Time)    Duration: 60 minutes

**Description**  
Learn CPR is a free public service supported by the...

**Instructions**  
Learn the basics of CPR - cardiopulmonary resuscitation. Updated with new CPR

Attendee Name	<input type="checkbox"/> Attended	Score	Status

**Document Name**  
CPR Illustrated in 3 Simple Steps.pdf

**File Name**  
C:\fakepath\CPR Illustrated in 3 Simple Step    **Browse...**

**Save**    **Cancel**

*Associating an offline training document*

6. Click **Save**.

## Assign Training to Me

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators, Trainees
-----------------	---

This task includes instructions for assigning training units to yourself. Only users who have been given the appropriate permission will be able to use the Assign to Me feature.



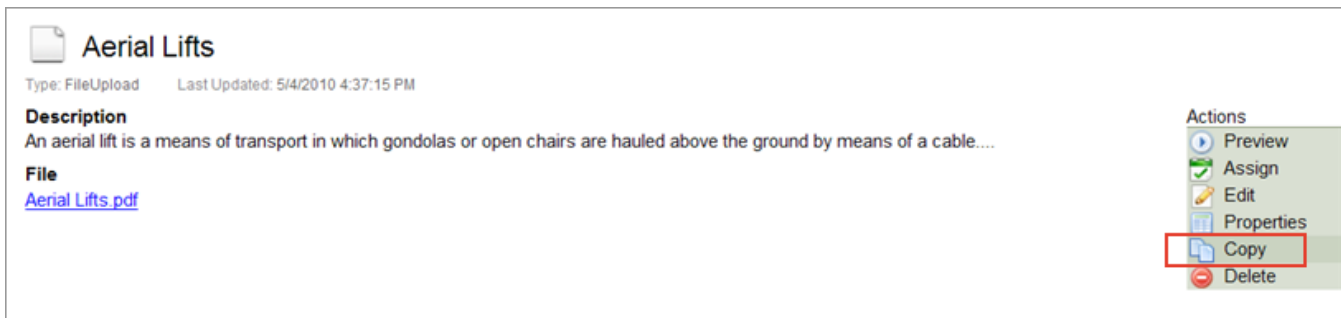
1. Click the **Library** link in the menu bar.
2. On the Training Library page, search for the desired training.
3. Highlight the training unit and select **Open**. Or, double-click the training unit name.
4. On the **Training Details** page, from the **Actions** Menu, select **Assign to Me**.
5. The training will appear in the user's Assignments panel as a new assignment. The assignment will not become overdue.

## Copy Training Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

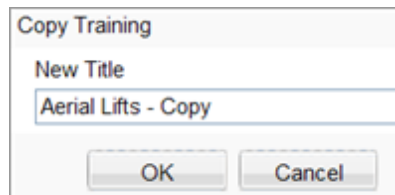
This task includes instructions for copying training units.

1. Click the **Library** link in the menu bar.
2. On the Training Library page, search for the desired training.
3. Highlight the training unit and select **Open**. Or, double-click the training unit name
4. On the **Actions** menu, select **Copy**.



*Copying training unit*

5. On the **Copy** page, provide a new name in the **Title** field. The title name must be unique.



*Copying a training*

6. Click **OK**. The newly copied training's Training Detail page appears.

**Aerial Lifts - Copy**  
 Type: FileUpload    Last Updated: 5/4/2010 4:37:15 PM

**Description**  
 An aerial lift is a means of transport in which gondolas or open chairs are hauled above the ground by means of a cable....

**File**  
[Aerial Lifts.pdf](#)

Training Details screen

## Preview Training Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for previewing, copying, and viewing the properties of training units.

1. Click the **Library** link in the menu bar. The Training Library page appears.
2. Highlight the training unit and select **Open**. Or, double-click the training unit name. The Training Details page appears for the selected training unit.
3. Select **Preview**. The training unit is previewed as it would be taken during an assignment.

**Aerial Lifts - Copy**  
 Type: FileUpload    Last Updated: 5/4/2010 4:37:15 PM

**Description**  
 An aerial lift is a means of transport in which gondolas or open chairs are hauled above the ground by means of a cable....

**File**  
[Aerial Lifts.pdf](#)

**Actions**

- Preview
- Assign
- Edit
- Properties
- Copy
- Delete

Previewing a training unit

## View Properties of Training Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for previewing, copying, and viewing the properties of training units.

1. Click the **Library** link in the menu bar. The Training Library page appears.
2. Highlight the training unit and select **Open**. Or, double-click the training unit name. The Training Details page appears for the selected training unit.
3. On the **Actions** menu, select **Properties**.
4. Within the **Training Properties** screen, provide the following information, where applicable.
5. The **General** tab includes:
  - a. Editable fields:

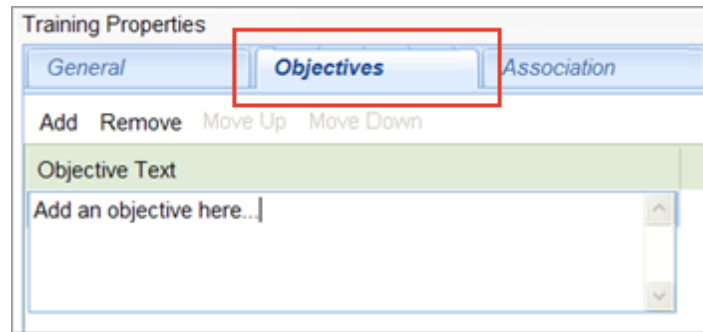
- i. Title (required)
  - ii. Description
  - iii. Estimated Time
  - iv. Provide a Minimum Time
  - v. Select Can Self assign check box
  - vi. Select to Hidden check box
- b. Non-Editable fields:
- i. Vendor
  - ii. Brand

The screenshot shows a 'Training Properties' dialog box with three tabs: 'General', 'Objectives', and 'Association'. The 'General' tab is selected and highlighted with a red box. The fields within the 'General' tab are as follows:

- Title:** Aerial Lifts - Copy
- Description:** An aerial lift is a means of transport in which gondolas or open chairs are hauled above the ground by means of a cable....
- Estimated Time:** 1
- Minimum Time:** 1
- Code:** PMX-198-111
- Vendor:** (empty field)
- Brand:** (empty field)
- Training Language:** English
- Can Self Assign:**
- Hidden:**

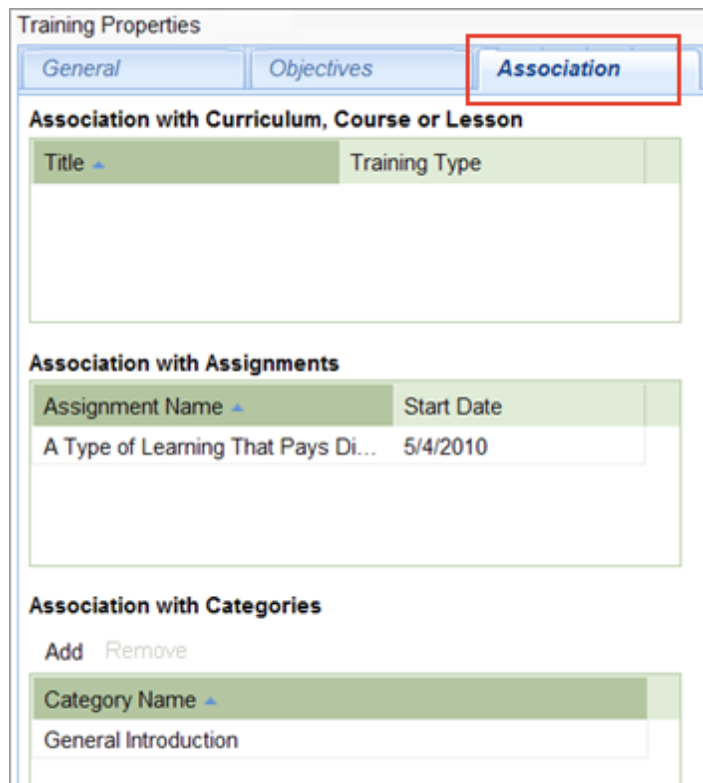
General tab

6. The **Objective** tab includes:
- a. To add Objectives, select Add.
    - i. Enter objectives.



Objectives tab

7. The **Association** tab displays:
- a. Association with Curriculum, Course, or Lesson.
  - b. Association with Assignments
  - c. Association with Category.



Association tab

8. The **Configuration** tab displays: (Note: The Configuration tab is only available for tests.)
- a. Definable Test preset fields:
  - b. Passing Score
  - c. Randomize Questions

- d. Retake Failed Questions Only
- e. Display Answer Feedback
- f. Presented Number of Questions
- g. Number of Attempts

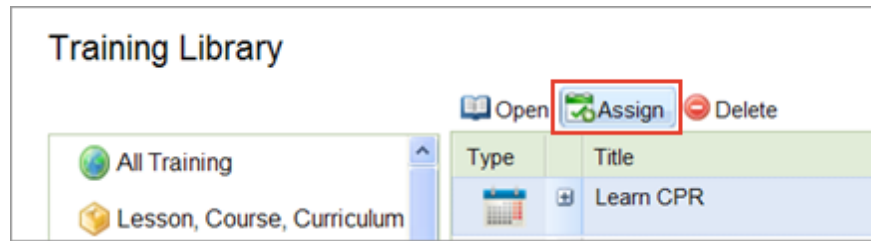
Configuration tab

## Assign Training Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for assigning training units to users.

1. Click the **Library** link in the menu bar. The Training Library page appears.
2. Use one of the following methods to select a training unit:
  - a. Highlight the training unit and select **Assign**. Or, double-click the training unit name, and on the Training Detail page, select **Assign** from the actions menu.
  - b. Highlight the training unit and select **Open**. On the Training Details page, select **Assign** from the **Actions** menu. The Create Training Assignment page appears for the selected training unit.
3. Highlight the training unit and select **Preview**. The training unit is previewed as it would be taken during an assignment. Note: Refer to the [Manage Assignments](#) topic for an explanation of the different types of assignments and instructions about how to create assignments.



Assigning a training unit

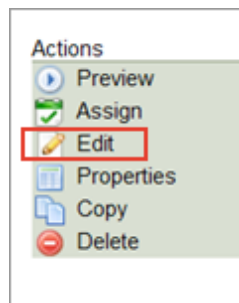
## Edit Training Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for editing presentations, tests, surveys, rich-text documents, references, third-party packages, and offline training. You can edit presentations only if your organization has licensed the Content Creation System (CCS).



Content created by PureSafety cannot be edited. However, you can [copy](#) PureSafety content and then edit the content you copied.



Edit link

### To edit presentations:

1. Click the **Library** link in the menu bar.
2. Open a presentation by:
  - a. Double-clicking the desired training.
  - b. Or, highlighting the training and selecting **Open**.
3. On the **Training Details** page, from **Actions**, select **Edit**.
  - a. Edit the presentation as desired.
4. Select **Save** to save the edits to the presentation.

### To edit tests:

1. Click the **Library** link in the menu bar.
2. Open a test by:
  - a. Double-clicking the desired training.

- b. Or, highlighting the training and selecting **Open**.
- 3. On the Training Details page, from **Actions**, select **Edit Test**.
  - a. Edit the test as desired.
- 4. Select **Save** to save the edits to the test.

**To edit surveys:**

---

- 1. Click the **Library** link in the menu bar.
- 2. Open a survey by:
  - a. Double-clicking the desired training.
  - b. Or, highlighting the training and selecting **Open**.
- 3. On the **Training Details** page, from **Actions**, select **Edit Survey**.
  - a. Edit the survey as desired.
- 4. Select **Save** to save the edits to the survey.

**To edit rich-text documents:**

---

- 1. Click the **Library** link in the menu bar.
- 2. Open a rich-text document by:
  - a. Double-clicking the desired training.
  - b. Or, highlighting the training and selecting **Open**.
- 3. On the Training Details page, from **Actions**, select **Edit**.
  - a. Edit the rich-text document as desired.
- 4. Select **Save** to save the edits to the rich-text document.

**To edit references:**

---

- 1. Click the **Library** link in the menu bar.
- 2. Open a reference by:
  - a. Double-clicking the desired training.
  - b. Or, highlighting the training and selecting **Open**.
- 3. On the Training Details page, from **Actions**, select **Edit**.
  - a. File**
    - i. Click Browse and select the updated file.
  - a. Website**
    - i. Enter new Website URL.
- 4. Select **Save** to save the edits to the reference.

**To edit third-party packages:**

1. Click the **Library** link in the menu bar.
2. Open a third-party package by:
  - a. Double-clicking the desired training.
  - b. Or, highlighting the training and selecting **Open**.
3. On the Training Details page, from **Actions**, select **Edit**.
  - a. Browse for the desired third-party package.
4. Select **Save** to save the edits to the third-party package.

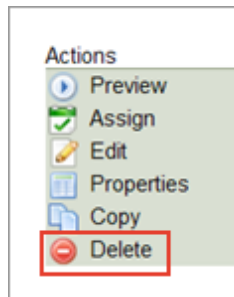
**To edit offline training:**

1. Click the **Library** link in the menu bar.
2. Open a offline training by:
  - a. Double-clicking the desired training.
  - b. Or, highlighting the training and selecting **Open**.
3. On the Training Details page, from **Actions**, select **Edit Sessions**.
  - a. Highlight the desired session, click **Edit**.
  - b. Edit the session as desired.
4. Select **Save** to save the edits to the offline training.

**Delete Training Units**

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

In order to delete a training unit, it must be removed from any Curriculums, Courses, Lessons, or Assignments. This section explains two methods for deleting training units.



*Delete link*

**To delete training units from the Training Library:**

1. Click the **Library** link in the menu bar. The Training Library page appears.
2. Highlight the training unit and select **Delete**. A confirmation prompt appears.
3. Select **Yes** to deleted the training unit. The selected training unit is removed from the Training Library.



## To delete training units from the Training Detail page:

---

1. Click the [Library](#) link in the menu bar. The [Training Library](#) page appears.
2. Highlight a training unit and select [Open](#). Or, double-click a training unit. The Training Details page appears.
3. From the [Actions](#) menu, select [Delete](#). A confirmation prompt appears.
4. Select [Yes](#) to delete the training unit. The selected training unit is removed from the Training Library.

## Organize Training Units

PureSafety's Learning and Safety Management System (LSMS) organizes instruction into three distinct "containers": Lesson, Course, and Curriculum. Users can organize training units into different lessons, courses, or curriculums based on their desired learning objectives. Each container is part of an overall instructional hierarchy. Once built, they are assignable. Typically, users (e.g., trainers, training administrators, or instructional designers) with permissions can create lessons, courses, and curriculums at any time. Each container type is very similar in terms of setup and management; however, there are rules that apply to each container.

- Lesson - A lesson is the smallest container for a single or multiple [Training Units](#). Note that a lesson cannot contain another lesson. For example, Asbestos training consists of four parts. In this case, a typical scenario may be to create four lessons with each lesson consisting of one part of the Asbestos training and an associated test. In another example, a lesson can combine a test, a MSDS, a PDF, or any combination of items.
- Course - A course is a container for a single lesson, multiple lessons, or other [Training Units](#). However, it cannot contain another course. In the Asbestos example, a typical Asbestos course could be made up of four lessons with each lesson consisting of two training units, the training program, and the associated test.
- Curriculum - A curriculum is a container for a single course, multiple courses and lessons, and/or [Training Units](#). However, it cannot contain another curriculum. For example, a New Hire Orientation program is an example of a curriculum. In this example, the curriculum may consist of the above mentioned "Asbestos" course, "Use of PPE", "First Aid", and "Working Safely with your Back".

LSMS provides the flexibility to organize instructional content in a way that best meets your safety training needs. Company A needs the instructional content provided by Personal Protective Equipment (PPE). PPE contains the following ten parts.

1. Overview
2. Head Protection
3. Eye and Face Protection
4. Hand and Arm Protection
5. Body Protection
6. Foot and Leg Protection
7. Hearing Protection
8. Respirators
9. Electricity
10. Levels of Protection and Protective Gear

Assume that each part is a self-standing PureSafety content (e.g., PS4). In the simplest case, Trainer Smith, who

works for Company A, may want to organize each part into its own individual lesson that includes his own test. When trainees need a certain piece of instruction, Smith assigns that individual lesson as needed.

Here is another example. Based on the needs of a certain population of his trainees who only needs instruction for head, eye, and face protection, Smith organizes lessons into a course. Conceivably, Smith can organize a course containing Overview, Head Protection, and Eye and Face Protection where each lesson contains a separate test and the course contains a survey.

Here is the final example. Based on the needs of his company's training requirements, certain trainees need the entire scope of the PPE instruction. To reinforce Company A's training requirements, Smith decides to organize each part into a course with additional lessons created by him. In this case, he organized each course into an entire curriculum.

## Create a Lesson, Course, or Curriculum

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

After creating the desired [training units](#), you can use the instructions in this task to organize them into a lesson, course, or curriculum.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Create Training**. The Create Training View appears.
3. Click **Lesson**, **Course**, or **Curriculum**. The corresponding Create page appears.
4. In the **Title** field, enter a title or name for the training set. An entry in this field is required.
5. The **Description** field is used to enter a description of the training set. If you enter a description in this field, it appears below the title in the Training Library.
6. In the Training section, select **Add**.

- a. Use [Search](#) to access the desired training. All of the items that meet your search criteria is displayed in the search results grid.
- b. Select the desired training title.
- c. Click the **Add** button. The selected training title is listed on the Create page.

The user has the ability to removed added training, and move training up or down in order from the Create page.

- d. With each training, there are additional options to consider.
  - i. Required. This option stipulates that a user must take this assignment to complete this training successfully. All newly added assignments have this check box selected by default.
  - ii. Pretest. This check box notifies the user that the newly added training unit is a pretest.
- e. If you want to ensure the user takes the assignment in the order it was created, select the **Training must be completed in sequence** check box. If this option is not selected, the user can take the assignment in any order.
7. Click **Create**. The page is refreshed and the new lesson, course, or curriculum is displayed with its related content.
  - To view the details of a training unit within a lesson, course, or curriculum, highlight the desired training unit and select **View Details**.

- To preview a training unit within a lesson, course, curriculum, highlight the desired training unit and select **Preview**.

### Create a Lesson

**Title\***

Determine the Root Cause

**Description**

The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The 5 Whys is a great Six Sigma tool that doesn't involve a statistical hypothesis and in many cases can be completed without a data collection plan.

Asking "Why?" may be a favorite technique of your three year old child in driving you crazy, but it could teach you a valuable Six Sigma quality lesson. The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. It's a great Six Sigma tool that doesn't involve data segmentation, hypothesis testing, regression or other advanced statistical tools, and in

**Training\***

Add Remove Move Up Move Down

Training	Required	Pretest
Determine the Root Cause	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Determine the Root Cause	<input checked="" type="checkbox"/>	

Display & Print CEU

Training must be completed in sequence.

*Creating a lesson*

## Edit a Lesson, Course, or Curriculum

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions how for editing a lesson, course, or curriculum.

1. Click the **Library** link in the menu bar.

2. Open a rich-text document by double-clicking the desired training. Or, highlighting the training and selecting **Open**.
3. On the Training Details page, from **Actions**, select **Edit**.
4. Edit any of the following fields
  - a. Description
  - b. Training
    - i. **Add** or **Remove** Training
    - ii. **Move Up** or **Move Down**
5. Select **Save** to save the edits to the selected lesson, course, or curriculum.

**Determine the Root Cause**

Type: Lesson    Last Updated: 5/5/2010 9:06:34 AM

**Description**

The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The 5 Whys is a great Six Sigma tool that doesn't involve a statistical hypothesis and in many cases can be completed without a data collection plan. Asking "Why?" may be a favorite technique of your three year old child in driving you crazy, but it could teach you a valuable Six Sigma quality lesson. The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. It's a great Six Sigma tool that doesn't involve data segmentation, hypothesis testing, regression or other advanced statistical tools, and in many cases can be completed without a data collection plan. By repeatedly asking the question "Why" (five is a good rule of thumb), you can peel away the layers of symptoms which can lead to the root cause of a problem. Very often the ostensible reason for a problem will lead you to another question. Although this technique is called "5 Whys," you may find that you will

[View Details](#)   [Preview](#)

Determine the Root Cause

Determine the Root Cause

**Actions**

- Assign
- Properties
- Copy
- Edit
- Delete

*Editing a lesson*

## Delete a Lesson, Course, or Curriculum

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

Refer to the [Delete Training Units](#) topic.

## Manage Assignments

The Assignment view contains all existing assignments regardless of who created it. Users (e.g., Trainers and Training Administrators) with appropriate permissions have the ability to conduct additional actions other than view assignments from this page.

For example, Smith is a Trainer and Johnson is a Training Administrator working for the same company. If Smith creates Assignment A and Johnson creates Assignment B, both will see Assignments A and B when they view the Assignment Directory. In addition to viewing Assignments, users can create a training assignment from the Assignment Directory as well. There are five types of assignments.

- One-Time Assignments. These assignments occur one time only.
- Recurring Assignments. These assignments recur at user-defined intervals.
- One-Time Series. These assignments stagger a block of training units.

- **Recurring Series.** These assignments recur at user-defined intervals in a staggered block of training tasks.
- **Certifications.** Certifications are used to track assignments that expire and must be retaken to remain certified.

An assignment is a single task or set of tasks that needs to be undertaken. Users with the appropriate permissions (e.g., trainers, training administrators) manage their instruction via Assignments. There are a number of actions users can do with assignments based on their permissions. For example, trainers or training administrators can view, create, remove, assign (to a person, group, or an organizational unit), update, and delete assignments. Trainees may have more limited capabilities—they can view, take an assignment, and self assign. Note that assignments are not used to organize training units. However, they can contain [training units](#), lessons, courses, or curriculum to assign ([Organize Training Units](#)). Assignments contain several properties, grouped by sections (Title, Date Range, Training, People, and Options).

## Create Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating assignments.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Select **Create**. The Create Training Assignment page appears. Enter the following information, where applicable:
  - a. **Title** (required)
  - b. **Assignment Type**. Select the assignment that best meets your training needs.
    - i. [One-Time Assignment](#)
    - ii. [Recurring Assignment](#)
    - iii. [One-Time Series](#)
    - iv. [Recurring Series](#)
    - v. [Certification](#)
  - c. **Date Range**
    - i. Specify the Start Date (required). Enter a date or use the Calendar Icon to lookup and select a date. Clicking the drop-down arrow next to the month year, displays the months and years to choose from.
    - ii. End Type and End Date will be determined by what type of Assignment is selected.
  - d. **Options**.
    - i. Assign to New Entrants. Any new entrants to Organization Unit(s) or Group(s) will inherit new training.
    - ii. Present Diploma Upon Completion. This option prompts the system to present a diploma to the trainee upon completion of the Assignment. A diploma may not be necessary or required upon completion of all Assignments.

- iii. Notify People Upon Start. By selecting this option, the system will notify the trainee they have started the Assignment.
  - iv. Notify People Upon Completion. By selecting this option, the system will notify the trainee they have completed the Assignment.
  - v. Notify People when overdue. By selecting this option, the system will notify the trainee they have an assignment overdue.
  - vi. Notify People upon deletion. By selecting this option, the system will notify the trainee their assignment has been deleted.
  - vii. Notify People upon removal. By selecting this option, the system will notify the trainee they have been removed from their assignment.
  - viii. Overdue Notification once in two weeks. By selecting this option, the system will notify the trainee every two weeks of their overdue assignment.
- e. **Training**. Search, select, and add desired training. This section allows users to remove selected training as well.
- i. Click **Add** on the Training Tasks menu. The Add Training window will open.
  - ii. Search for the name of the training unit or scroll through the list of available training.
  - iii. Highlight the training unit(s) to be added to the Assignment.
  - iv. Click **Add** to add the training units to the assignment and return to the Create Training Assignment page.
- f. **People**. Add or remove employee(s), Organizational Unit(s), or Group(s) to the Assignment.
- i. Click **Add** on the People menu. The Add People window will open.
  - ii. Search for the name of the employee, Organization Unit, or Group or scroll through the list of available employees, Organization Units, and Groups.
  - iii. Click **Add** to add the user, organizational unit, or group to the assignment.
4. Click **Create** to create the assignment.

## Create Training Assignment

### Assignment

Title \*

### Options

Assignment Type

One Time Assignment ▾

Start Date \*

05/06/2010

End Date

- Assign to new entrants.
- Present diploma upon completion.
- Notify People upon start.
- Notify People upon completion.
- Notify People when overdue.
- Notify People upon deletion.
- Notify People upon removal.
- Overdue Notification once in two weeks.

### Training

Add Remove

Type	Training ▾	Required
------	------------	----------

### People

Add Remove

Type	Name ▾
------	--------

Create a Training Assignment page

## Create One-Time Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating a one-time assignment.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Click **Create**.
4. On the Create Training Assignment page, provide the following information, where applicable:
  - a. **Title** (required)
  - b. In the **Assignment Type** field, select One-Time Assignment.
  - c. **Date Range**. Specify the date range with the following fields.
    - i. **Start Date** (required). Enter a date or use the Calendar Icon to lookup and select a date.
    - ii. **End Date** (optional). Enter a date or use the Calendar Icon to lookup and select a date.
  - d. **Options**.
    - i. **Assign to New Entrants**. Any new entrants to an Organization Unit(s) or Group(s) will inherit new assignments.
    - ii. **Present Diploma Upon Completion**. This option prompts the system to present a diploma to the trainee upon completion of the Assignment. A diploma may not be necessary or required upon completion of all assignments.
    - iii. **Notify People Upon Start**. By selecting this option, the system will notify the trainee they have started the Assignment.
    - iv. **Notify People Upon Completion**. By selecting this option, the system will notify the trainee they have completed the Assignment.
    - v. **Notify People when overdue**. By selecting this option, the system will notify the trainee they have an assignment overdue.
    - vi. **Notify People upon deletion**. By selecting this option, the system will notify the trainee their assignment has been deleted.
    - vii. **Notify People upon removal**. By selecting this option, the system will notify the trainee they have been removed from their assignment.
    - viii. **Overdue Notification once in two weeks**. By selecting this option, the system will notify the trainee every two weeks of their overdue
  - e. **Training**. Search, select, and add desired training. This section allows users to remove selected training as well.
    - i. Click **Add** on the Training Tasks menu. The Add Training window will open.
    - ii. Search for the name of the training unit or scroll through the list of available training.
    - iii. Highlight the Training Unit(s) to be added to the Assignment.



- iv. Clicking **Add** adds the Training Unit(s) to the Assignment and the system returns to the Create Training Assignment page.
- f. **People**. Add or remove employees, Organization Units or Groups to the Assignment.
  - i. Click on **Add** on the People menu. The Add People window will open.
  - ii. Search for the name of the employee, Organization Unit or Group or scroll through the list of available employees, Organization Units, and Groups.
  - iii. Highlight the name(s) to be added to the Assignment.
  - iv. Clicking Add adds the employee(s), Organization Unit(s), or Group(s) to the Assignment and the system returns to the Create Training Assignment page.
- 5. Click **Create** to create the assignment.

## Create Training Assignment

### Assignment

Title \*


Employee Safety Orientation

### Options


Assignment Type

One Time Assignment ▾

Start Date \*

05/06/2010 

End Date



- Assign to new entrants.
- Present diploma upon completion.
- Notify People upon start.
- Notify People upon completion.
- Notify People when overdue.
- Notify People upon deletion.
- Notify People upon removal.
- Overdue Notification once in two weeks.

### Training

Add Remove

Type	Training ▾	Required
	Employee Safety Orientation	<input checked="" type="checkbox"/>

### People

Add Remove

Type	Name ▾
	Bancroft, Anne Janet

*Creating a one-time assignment*

## Create One-time Series

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating a one-time series.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Click **Create**.
4. On the Create Training Assignment page, provide the following information, where applicable:
  - a. **Title** (required)
  - b. In the **Assignment Type** field, select One-Time Series.
  - c. **Date Range**. Specify the date range with the following fields.
    - i. **Start Date** (required). Enter a date or use the Calendar Icon to lookup and select a date.

### d. Options

- i. Assign to New Entrants. Any new entrants to an Organization Unit(s) or Group(s) will inherit new assignments.
  - ii. Present Diploma Upon Completion. This option prompts the system to present a diploma to the trainee upon completion of the Assignment. A diploma may not be necessary or required upon completion of all assignments.
  - iii. Notify People Upon Start. By selecting this option, the system will notify the trainee they have started the Assignment.
  - iv. Notify People Upon Completion. By selecting this option, the system will notify the trainee they have completed the Assignment.
  - v. Notify People when overdue. By selecting this option, the system will notify the trainee they have an assignment overdue.
  - vi. Notify People upon deletion. By selecting this option, the system will notify the trainee their assignment has been deleted.
  - vii. Notify People upon removal. By selecting this option, the system will notify the trainee they have been removed from their assignment.
  - viii. Overdue Notification once in two weeks. By selecting this option, the system will notify the trainee every two weeks of their overdue
- e. **Training**. Search, select, and add desired training. This section allows users to remove selected training as well.
- i. Click **Add** on the Training Tasks menu. The Add Training window opens.
  - ii. Search for the name of the training unit or scroll through the list of available training.
  - iii. Highlight the training unit(s) to be added to the assignment.

- iv. Click **Add** to add the training unit(s) to the assignment. The system returns to the Create Training Assignment page.
  - v. Once training is added, set delay and duration.
    - Delay is when the training will begin. If the delay is set to zero, the training will begin immediately. Start training immediately by setting the delay to Zero. Delay training by setting the number and type (days, weeks, months, quarters, years).
    - Duration is how long the training will last. Set training length by setting the number and type (days, weeks, months, quarters, years).
  - f. **People**. Add or remove employees, organization units, or groups to the assignment.
    - i. Click on **Add** on the People menu. The Add People window opens.
    - ii. Search for the name of the employee, Organization Unit or Group or scroll through the list of available employees, Organization Units, and Groups.
    - iii. Highlight the name(s) to be added to the Assignment.
    - iv. Click **Add** to add the employee(s), Organization Unit(s), or Group(s) to the Assignment. The system returns to the Create Training Assignment page.
5. Click **Create** to create the assignment.

## Create Training Assignment

### Assignment

**Title \***

Determine the Root Cause Analysis

### Options

**Assignment Type**

One Time Series ▼

**Start Date \***

05/06/2010 📅

- Assign to new entrants.
- Present diploma upon completion.
- Notify People upon start.
- Notify People upon completion.
- Notify People when overdue.
- Notify People upon deletion.
- Notify People upon removal.
- Overdue Notification once in two weeks.

### Training

Add Remove

Type	Training <span>▲</span>	Delay	Dur.	Required
	Determine the Root Cause	1 Year(s)	1 Month(s)	<input checked="" type="checkbox"/>

### People

Add Remove

Type	Name <span>▲</span>
	Bancroft, Anne Janet

*Creating a one-time series*

## Create Recurring Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating a recurring assignment.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Click **Create**.
4. On the Create Training Assignment page, provide the following information, where applicable:
  - a. **Title** (required)
  - b. In the **Assignment Type** field, select Recurring Assignment.
  - c. **Date Range**. Specify the date range with the following fields.
    - i. Specify the Start Date (required). Enter a date or use the Calendar Icon to lookup and select a date.
    - ii. Specify how often you want it to appear and for how many times you want it to appear, (e.g. Every 6 Months, for 2 Recurrences).
    - iii. Specify the **Recurrence Type**
      - a) Recur based on Start Date, sets the recurrences based on the date the assignment begins.
      - b) Recur based on Completed Date, sets the recurrences based on the date a trainee completes a recurrence.
  - d. **Options**
    - i. Assign to New Entrants. Any new entrants to an Organization Unit(s) or Group(s) will inherit new assignments.
    - ii. Present Diploma Upon Completion. This option prompts the system to present a diploma to the trainee upon completion of the Assignment. A diploma may not be necessary or required upon completion of all assignments.
    - iii. Notify People Upon Start. By selecting this option, the system will notify the trainee they have started the Assignment.
    - iv. Notify People Upon Completion. By selecting this option, the system will notify the trainee they have completed the Assignment.
    - v. Notify People when overdue. By selecting this option, the system will notify the trainee they have an assignment overdue.
    - vi. Notify People upon deletion. By selecting this option, the system will notify the trainee their assignment has been deleted.
    - vii. Notify People upon removal. By selecting this option, the system will notify the trainee they have been removed from their assignment.
    - viii. Overdue Notification once in two weeks. By selecting this option, the system will notify the trainee every two weeks of their overdue

- e. **Training**. Search, select, and add desired training. This section allows users to remove selected training as well.
    - i. Click **Add** on the Training Tasks menu. The Add Training window will open.
    - ii. Search for the name of the training unit or scroll through the list of available training.
    - iii. Highlight the Training Unit(s) to be added to the Assignment.
    - iv. Clicking **Add** adds the Training Unit(s) to the Assignment and the system returns to the Create Training Assignment page.
  - f. **People**. Add or remove employees, Organization Units or Groups to the Assignment.
    - i. Click on Add on the People menu. The Add People window will open.
    - ii. Search for the name of the employee, Organization Unit or Group or scroll through the list of available employees, Organization Units, and Groups.
    - iii. Highlight the name(s) to be added to the Assignment.
    - iv. Clicking **Add** adds the employee(s), Organization Unit(s), or Group(s) to the Assignment and the system returns to the Create Training Assignment page.
5. Click **Create** to create the assignment.

## Create Training Assignment

### Assignment

**Title \***

Determine the Root Cause Analysis

### Options

**Assignment Type**

Recurring Assignment ▾

**Start Date \***


05/06/2010 

Every  Year(s) ▾ for  Recurrence(s).

- Recur based on start date.
- Recur based on completed date.
- Assign to new entrants.
- Present diploma upon completion.
- Notify People upon start.
- Notify People upon completion.
- Notify People when overdue.
- Notify People upon deletion.
- Notify People upon removal.
- Overdue Notification once in two weeks.

### Training

Add Remove

Type	Training ▾	Required
	Determine the Root Cause	<input checked="" type="checkbox"/>

### People

Add Remove

Type	Name ▾
	Bancroft, Anne Janet



## Create Recurring Series

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating a recurring assignment.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Click **Create**.
4. On the Create Training Assignment page, provide the following information, where applicable:
  - a. **Title** (required)
  - b. In the **Assignment Type** field, select Recurring Series.
  - c. **Date Range**. Specify the date range with the following fields.
    - i. Start Date (required). Enter a date or use the Calendar Icon to lookup and select a date.
    - ii. Specify how often you want it to appear and for how many times you want it to appear, (e.g. Every 6 Months, for 2 Recurrences).
    - iii. Specify the **Recurrence Type**
      - a) Recur based on Start Date, sets the recurrences based on the day the assignment begins.
      - b) Recur based on Completed Date, sets the recurrences based on the day a trainee completes a recurrence.
  - d. **Options**
    - i. Assign to New Entrants. Any new entrants to an Organization Unit(s) or Group(s) will inherit new assignments.
    - ii. Present Diploma Upon Completion. This option prompts the system to present a diploma to the trainee upon completion of the Assignment. A diploma may not be necessary or required upon completion of all assignments.
    - iii. Notify People Upon Start. By selecting this option, the system will notify the trainee they have started the Assignment.
    - iv. Notify People Upon Completion. By selecting this option, the system will notify the trainee they have completed the Assignment.
    - v. Notify People when overdue. By selecting this option, the system will notify the trainee they have an assignment overdue.
    - vi. Notify People upon deletion. By selecting this option, the system will notify the trainee their assignment has been deleted.
    - vii. Notify People upon removal. By selecting this option, the system will notify the trainee they have been removed from their assignment.
    - viii. Overdue Notification once in two weeks. By selecting this option, the system will notify the trainee every two weeks of their overdue

- e. **Training**. Search, select, and add desired training. This section allows users to remove selected training as well.
    - i. Click **Add** on the Training Tasks menu. The Add Training window will open.
    - ii. Search for the name of the training unit or scroll through the list of available training.
    - iii. Highlight the Training Unit(s) to be added to the Assignment.
    - iv. Clicking **Add** adds the Training Unit(s) to the Assignment and the system returns to the Create Training Assignment page.
    - v. Once training is added, set Delay and Duration.
      - a) **Delay** is when the training will begin. If the delay is set to zero, the training will begin immediately. Start training immediately by setting the delay to Zero. Delay training by setting the number and type (days, weeks, months, quarters, years).
      - b) **Duration** is how long the training will last. Set training length by setting the number and type (days, weeks, months, quarters, years).
  - f. **People**. Add or remove employees, Organization Units or Groups to the Assignment.
    - i. Click on **Add** on the People menu. The Add People window will open.
    - ii. Search for the name of the employee, Organization Unit or Group or scroll through the list of available employees, Organization Units, and Groups.
    - iii. Highlight the name(s) to be added to the Assignment.
    - iv. Clicking **Add** adds the employee(s), Organization Unit(s), or Group(s) to the Assignment and the system returns to the Create Training Assignment page.
5. Click **Create** to create the assignment.

## Create Training Assignment

### Assignment

**Title \***


Determine the Root Cause Analysis

### Options

**Assignment Type**

Recurring Series ▾

**Start Date \***




05/06/2010 

Every  Year(s) ▾ for  Recurrence(s).

- Recur based on start date.
- Recur based on completed date.
- Assign to new entrants.
- Present diploma upon completion.
- Notify People upon start.
- Notify People upon completion.
- Notify People when overdue.
- Notify People upon deletion.
- Notify People upon removal.
- Overdue Notification once in two weeks.

### Training

Add Remove

Type	Training ▾	Delay	Dur.	Required
	Determine the Root Cause	1 Month(s)	1 Month(s)	<input checked="" type="checkbox"/>
	Access to Medical and Exposure Records, PS4 eLes...	2 Month(s)	1 Month(s)	<input checked="" type="checkbox"/>
	Fall Protection v2, PS4 eLesson	3 Month(s)	1 Month(s)	<input checked="" type="checkbox"/>

### People

Add Remove

Type	Name ▾
	Bancroft, Anne Janet

## Create Certifications

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating a certification.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Click **Create**.
4. On the Create Training Assignment page, provide the following information, where applicable:
  - a. **Title** (required)
  - b. In the **Assignment Type** field, select Certification.
  - c. **Date Range**. Specify the date range with the following fields.
    - i. **Start Date** (required). Enter a date or use the Calendar Icon to lookup and select a date.
    - ii. Specify how long the trainee has to complete the training.
    - iii. Specify when the certification will expire. Recurrences are calculated based on when an assignment is completed and when the certification will expire.
  - d. **Options**
    - i. **Assign to New Entrants**. Any new entrants to an Organization Unit(s) or Group(s) will inherit new assignments.
    - ii. **Present Diploma Upon Completion**. This option prompts the system to present a diploma to the trainee upon completion of the Assignment. A diploma may not be necessary or required upon completion of all assignments.
    - iii. **Notify People Upon Start**. By selecting this option, the system will notify the trainee they have started the Assignment.
    - iv. **Notify People Upon Completion**. By selecting this option, the system will notify the trainee they have completed the Assignment.
    - v. **Notify People when overdue**. By selecting this option, the system will notify the trainee they have an assignment overdue.
    - vi. **Notify People upon deletion**. By selecting this option, the system will notify the trainee their assignment has been deleted.
    - vii. **Notify People upon removal**. By selecting this option, the system will notify the trainee they have been removed from their assignment.
    - viii. **Overdue Notification once in two weeks**. By selecting this option, the system will notify the trainee every two weeks of their overdue
  - e. **Training**. Search, select, and add desired training. This section allows users to remove selected training as well.
    - i. Click **Add** on the Training Tasks menu. The Add Training window will open.

- ii. Search for the name of the training unit or scroll through the list of available training.
- iii. Highlight the Training Unit(s) to be added to the Assignment.
- iv. Clicking **Add** adds the Training Unit(s) to the Assignment and the system returns to the Create Training Assignment page.
- f. **People**. Add or remove employees, Organization Units or Groups to the Assignment.
  - i. Click on **Add** on the People menu. The Add People window will open.
  - ii. Search for the name of the employee, Organization Unit or Group or scroll through the list of available employees, Organization Units, and Groups.
  - iii. Highlight the name(s) to be added to the Assignment.
  - iv. Clicking **Add** adds the employee(s), Organization Unit(s), or Group(s) to the Assignment and the system returns to the Create Training Assignment page.
- 5. Click **Create** to create the assignment.

## Create Training Assignment

### Assignment

**Title \***

Avoiding Rear End Collisions

### Options

**Assignment Type**

Certification ▼

**Start Date \***

05/06/2010 📅

The trainee must complete this certification within:

- No Limit  
 2 Month(s) ▼

This certification will expire after:

- Never Expires  
 1 Year(s) ▼

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Assign to new entrants. | <input type="checkbox"/> Notify People when overdue.             |
| <input type="checkbox"/> Present diploma upon completion.   | <input type="checkbox"/> Notify People upon deletion.            |
| <input type="checkbox"/> Notify People upon start.          | <input type="checkbox"/> Notify People upon removal.             |
| <input type="checkbox"/> Notify People upon completion.     | <input type="checkbox"/> Overdue Notification once in two weeks. |

### Training

Add Remove

Type	Training <span style="float: right;">▼</span>	Required
	Avoiding Rear End Collisions - Large Vehicles, PS4 eLesson	<input checked="" type="checkbox"/>

### People

Add Remove

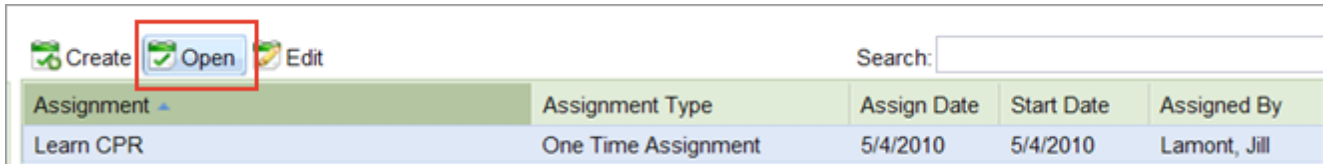
Type	Name <span style="float: right;">▼</span>
	Bancroft, Anne Janet

## View Assignment Details

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for viewing assignment details.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight an assignment.
4. Click **Open**. Or, double-click the training unit name. The system displays the details of the assignment.



*Opening an assignment*

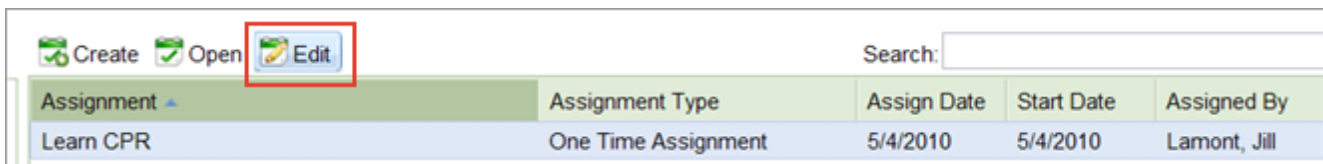
5. The administrator can select a trainee and print a diploma for training if the trainee has completed the training.

## Edit Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit an assignment, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless they are marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight an assignment.
4. Select **Open**. Or, double-click the desired training.



*Editing an assignment*

5. From **Actions**, select **Edit**, then apply changes as necessary.
  - a. For Example: Print Diploma upon completion and the Notification options may be edited.
    - i. Check the boxes to allow diplomas to be printed by administrators or trainees and the Notify options.
  - b. For example: Remove Training
    - i. From **Training**, highlight the training to be removed.

- ii. Select **Remove**.
- c. For example: Remove People
  - i. From **People**, highlight the person to be removed.
  - ii. Select **Remove**.
- 6. Select **Save** to save the edits to the assignment.

## Edit One-Time Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit a one-time assignment, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless he is marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight a recurring assignment.
4. Select **Open**. Or, double-click the desired training.
5. From **Actions**, select **Edit**, to make changes to the assignment. Note: If the Assignment the status is Not Started, refer to the [Create Assignments](#) topic. Enter the following data:
  - a. Title
  - b. End Date may be extended into the future. Note: If no End Date is present, you may add an End Date.
  - c. Print Diploma upon completion and the Notification options may be edited
    - i. Select the check boxes to allow diplomas to be printed by administrators or trainees and enables the Notify options.
  - d. Remove Training
    - i. From **Training**, highlight the training to be removed.
    - ii. Click **Remove**.
  - e. Remove People
    - i. From **People**, highlight the person to be removed.
    - ii. Click **Remove**.
6. Click **Save** to save the edits to the assignment.

## Edit One-Time Series

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit a one-time series, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless



they are marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight a recurring assignment.
4. Select **Open**. Or, double-click the desired training.
5. From **Actions**, select **Edit**, to make changes to the assignment. Note: If the Assignment the status is Not Started, refer to [Creating Assignments](#). Enter the following data:
  - a. Title
  - b. End Date may be extended into the future. Note: If no End Date is present, you may add an End Date.
  - c. Print Diploma upon completion and the Notification options may be edited
    - i. Select the check boxes to allow diplomas to be printed by administrators or trainees and enables the Notify options.
  - d. Remove Training
    - i. From **Training**, highlight the training to be removed.
    - ii. Click **Remove**.
  - e. Remove People
    - i. From **People**, highlight the person to be removed.
    - ii. Click **Remove**.
6. Click **Save** to save the edits to the assignment.

## Edit Recurring Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit a recurring assignment, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless they are marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight a recurring assignment.
4. Select **Open**. Or, double-click the desired training.
5. From **Actions**, select **Edit**, to make changes to the assignment. Note: If the Assignment the status is Not Started, refer to [Creating Assignments](#). Enter the following data:
  - a. Title
  - b. End Date may be extended into the future. Note: If no End Date is present, you may add an End Date.
  - c. Print Diploma upon completion and the Notification options may be edited

- i. Select the check boxes to allow diplomas to be printed by administrators or trainees and enables the Notify options.
  - d. Remove Training
    - i. From **Training**, highlight the training to be removed.
    - ii. Click **Remove**.
  - e. Remove People
    - i. From **People**, highlight the person to be removed.
    - ii. Click **Remove**.
- 6. Click **Save** to save the edits to the assignment.

## Edit Recurring Series

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit a recurring series, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless they are marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight a recurring assignment.
4. Select **Open**. Or, double-click the desired training.
5. From **Actions**, select **Edit**, to make changes to the assignment. Note: If the Assignment the status is Not Started, refer to [Creating Assignments](#). Enter the following data:
  - a. Title
  - b. End Date may be extended into the future. Note: If no End Date is present, you may add an End Date.
  - c. Print Diploma upon completion and the Notification options may be edited
    - i. Select the check boxes to allow diplomas to be printed by administrators or trainees and enables the Notify options.
  - d. Remove Training
    - i. From **Training**, highlight the training to be removed.
    - ii. Click **Remove**.
  - e. Remove People
    - i. From **People**, highlight the person to be removed.
    - ii. Click **Remove**.
6. Click **Save** to save the edits to the assignment.

## Edit Certifications

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit a certification, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless they are marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight a recurring assignment.
4. Select **Open**. Or, double-click the desired training.
5. From **Actions**, select **Edit**, to make changes to the assignment. Note: If the Assignment the status is Not Started, refer to [Creating Assignments](#). Enter the following data:
  - a. Title
  - b. End Date may be extended into the future. Note: If no End Date is present, you may add an End Date.
  - c. Print Diploma upon completion and the Notification options may be edited
    - i. Select the check boxes to allow diplomas to be printed by administrators or trainees and enables the Notify options.
  - d. Remove Training
    - i. From **Training**, highlight the training to be removed.
    - ii. Click **Remove**.
  - e. Remove People
    - i. From **People**, highlight the person to be removed.
    - ii. Click **Remove**.
6. Click **Save** to save the edits to the assignment.

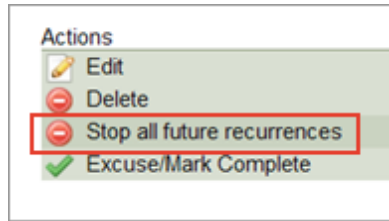
## Stop All Future Recurrences

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To edit a recurring assignment, complete the following steps. Note that you cannot remove training that is In Progress from an assignment. An employee that has started an assignment cannot be removed from that assignment unless they are marked excused or complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears.
3. Highlight a recurring assignment.
4. Select **Open**. Or, double-click the desired training.

- From **Actions**, select **Stop all future recurrences**, to apply changes within assignment. The system requires you to validate stopping recurrences of the assignment.



*Stop All Future Recurrences link*

- All future recurrences are disabled.

## Delete Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

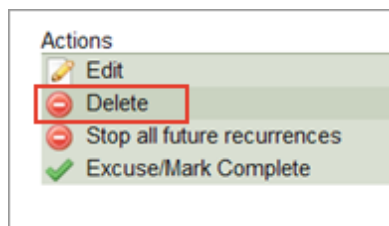
This task includes instructions for deleting assignments.

- Click **Library** in the menu bar. The Training Library appears.
- In the left panel, click **Assignments**. The Assignment view appears.
- Highlight an assignment.
- Select **Delete**. The system displays a confirmation message. Select Yes or No to confirm the assignment's deletion.



**If an assignment's status changes from Not Started to In Progress or Completed, the assignment cannot be deleted.**

- On the **Assignment** Directory page, highlight an assignment.
- Select **Open**.
- On the Assignment Details page, from the **Actions** menu, select **Delete**. The system displays a confirmation message.



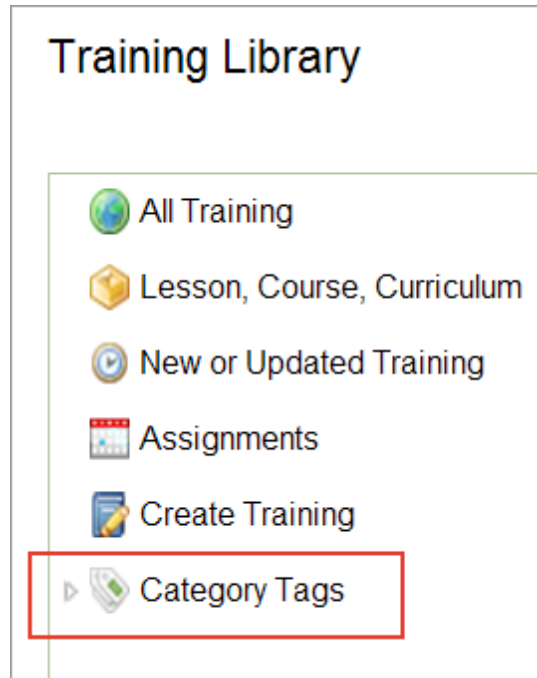
*Delete Assignment link*

- Select **Yes** or **No** to confirm the Assignment's deletion.

## Manage Category Tags

The inclusion of Category Tags in the Training Library allows users to better organize training in groups of training that are similar to one another. These tagged groups of training provide an easier method for filtering through the Training Library and searching for general topics of training.

For example, Smith is a training administrator for a company that has purchased OSHA 10 Hour General Industry, OSHA 10 Hour Construction and OSHA 30 Hour Construction. For easier searching and filtering, Smith creates a Category Tag named OSHA and associates it with each of the training mentioned above. Now Smith can filter his Library by OSHA training easily to show the specific training he wants to see.



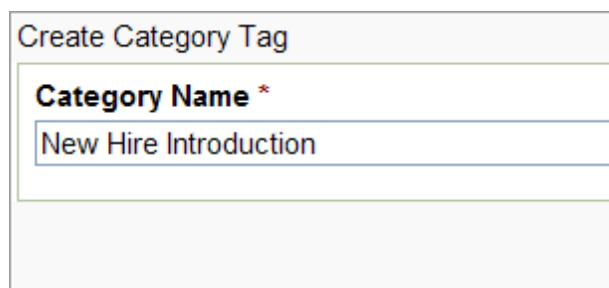
*Category Tags link*

## Create Category Tags

Affected roles:	System Administrators, Training Administrators
-----------------	--

This task includes instructions for creating category tags.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Category Tags**. The Category view appears.
3. Select **Create**.
4. The **Create Category Tag** dialog box appears. Input a title in the **Category Name** field.
5. Click **Create**.



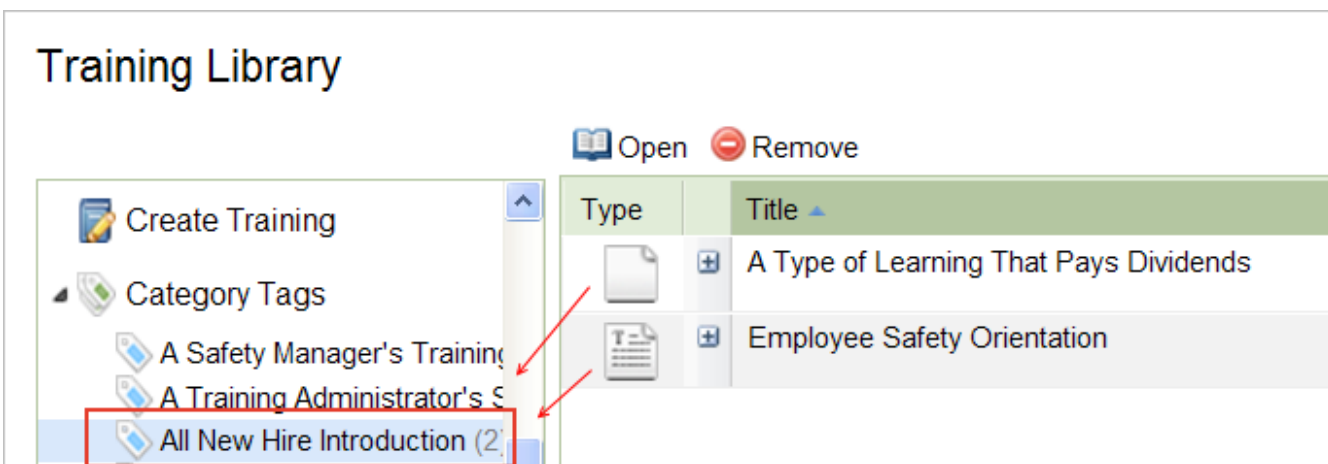
*Creating a category tag*

## Associate Training to Category Tags

Affected roles:	System Administrators, Training Administrators
-----------------	--

This task includes instructions for associating training to category tags.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click the arrow next to the label **Category Tags**. A list of available Category Tags appears.
3. From the list of training, search for desired training.
4. Select the training from the list, drag and drop the training into the desired category tag.
5. To remove a training unit from a tag, select a category tag, the desired training and **Remove**.



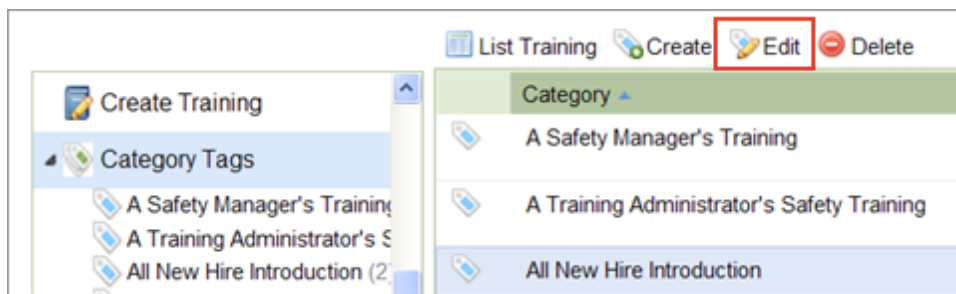
*Associating a training to a category tag*

## Edit Category Tags

Affected roles:	System Administrators, Training Administrators
-----------------	--

This task includes instructions for editing category tags.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Category Tags**. The Category view appears.
3. Highlight the desired category.
4. Select **Edit**. The Edit Category Tag dialog box appears.
5. Edit the **Category Name** field.
6. Click **Save**.



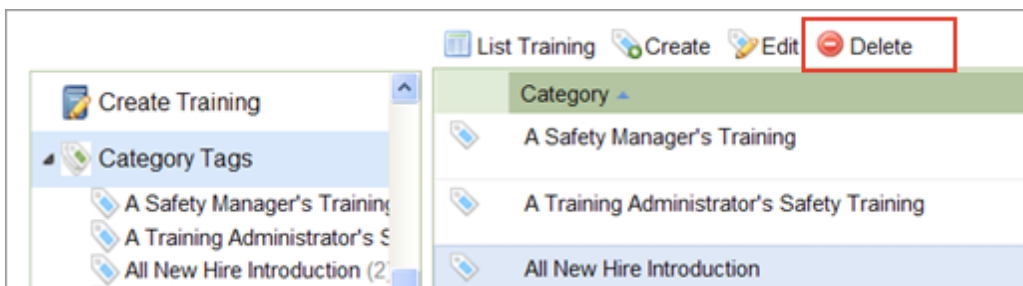
Editing a category tag

## Delete Category Tags

Affected roles:	System Administrators, Training Administrators
-----------------	--

This task includes instructions for deleting category tags.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Category Tags**. The Category view appears.
3. Highlight the desired category.
4. Select **Delete**. The **Confirm Delete** dialog box appears.
5. To delete, click **Yes**.



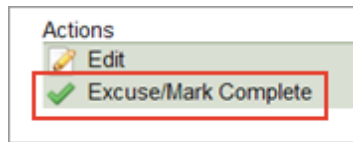
Deleting a category tag

## Excuse Training / Mark Complete without Request

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for excusing or marking training complete.

1. Click **Library** in the menu bar. The Training Library appears.
2. In the left panel, click **Assignments**. The Assignment view appears
3. Highlight an assignment.
4. Click **Open** or double-click the training unit name. The system displays the details of the assignment.
5. From the **Actions** menu, click **Excuse/Mark Complete**. The Excuse/Mark Complete Training Assignment page appears.



*Excuse/Mark Complete link*

6. Select **Mark Complete** or **Excuse**.
7. Provide comments. This is an optional step.
8. Select the training you need to mark excused or complete.
  - a. Specify **Time Spent** (optional). Time Spent is an option only if you are recording that training is complete.
9. In the **People** grid, click **Select**. The Add People grid appears.
10. From **Add People**, select **Trainees**.
11. Click **OK**.
12. Click **Submit**.



## Excuse/Mark Complete Training Assignment

### Assignment

**Title**

A Type of Learning That Pays Dividends

### Details

**Assignment Type**

One Time Assignment

**Start Date**

5/4/2010

**End Date**

5/7/2010

**Assign to new entrants.**

Yes

**Notify People upon start.**

No

**Present diploma upon completion.**

No

**Notify People upon completion.**

No

**Overdue Notification once in two weeks.**

No

### Options

**Excuse/MarkComplete**

Mark Complete ▾

### Comment

Put your comment here...

**Send Notification**

### Training

Select All UnSelect All

Title	Time Spent
<input checked="" type="checkbox"/> A Type of Learning That Pays Dividends	0:00



**Part**



**V**

**Understanding the  
Organization Directory**

## Understanding the Organization Directory

The People Management page provides links to various building blocks used to work with a company's hierarchy, employees, user accounts, and roles. The Learning and Safety Management System's (LSMS) core purpose is to provide training to facilitate better safety awareness. Building the hierarchical structure and collecting the employee's biographical data provide the foundation to implement safety training. From the People link you can manage.

- The Organizational Directory displays people, hierarchy, and groups and aids in managing all three. For more details, refer to the [Maintain Organization Units](#) topic.
- Employees are managed by creating employees and assigning them a user account as well as placing them in the Hierarchy and Security Roles. For more details, refer to the [Maintain Employees](#) topic.
- Groups allow employees and organizational units across the hierarchy with commonalities to be grouped together. For more details, refer to the [Maintain Groups](#) topic.
- Security Roles displays available roles used to access the system. For more details, refer to the [Maintain Security Roles](#) topic.

### **Example A:**

The company PureWorks is a new PureSafety client. PureWorks imports their organizational hierarchy and all their employees into the PureSafety LSMS. An employee of PureWorks, Bill Smith, is in the Southeast Division of the organizational hierarchy. The System Administrator creates a user account for Bill Smith and places him in the Training Administrator role. This role allows him to create assignments, manage training, and run reports.

- Client: PureWorks
- Organizational Hierarchy: Southeast Division
- Employee: Bill Smith
- User Account: bill.smith
- Role: Training Administrator

### **Example B:**

PureWorks, a PureSafety client, hires a new employee, Bill Smith. Bill has been hired in the Southeast Division, in the Atlanta, GA office. In the organizational hierarchy, PureWorks is the parent unit for the company. The Southeast Division is a unit under PureWorks. Atlanta is a unit under the Southeast Division. Bill is placed in the Atlanta Unit of the hierarchy. Bill has been hired to be the Training Supervisor for the Atlanta office. Bill is added to a group called Training Supervisors that contains each office's training supervisor.

- Bill receives training assignments as they are made to PureWorks as a whole company, assignments to the Southeast Division as a whole, assignments to the Atlanta unit, and assignments made to the Training Supervisor group.
- Bill is later transferred to the Seattle, WA office in the Northwest Division to be the Office Manager. In the LSMS, on the Organizational Directory page, the system administrator moves Bill from the Atlanta unit to the Seattle unit and is moved from the Training Supervisor group to the Office Manager group. Bill no longer has training associated with the Atlanta unit, Southeast Division unit, or Training Supervisor group. He also inherits training associated with the Northwest Division unit, the Seattle unit, and the Office Manager group. He retained any training assigned to him individually or to the company, PureWorks, as a whole.

## Maintain Organization Units

An organization unit is a single component in a hierarchy. A unit can represent any type of component in the hierarchy from entire companies, to divisions of a company, to job titles within a single office.

### Create Organization Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating organization units.

1. Click the **People** link in the menu bar. The Organization Directory page appears.
2. Highlight a folder in the organizational hierarchy. Note: The create option is not enabled until you have selected a folder.
3. Click **Create** from the menu. The new organization unit is created under the selected folder.



Create Organization Unit link

4. In the Create Organization Unit dialog box, enter appropriate information.
5. In the Organization Unit Administrators grid, select **Add**. The Add People selection grid appears.
6. Search and select the desired people.
7. Click **OK**.



**People in the Organization Unit Administrators section must have organization unit administrator security roles. For more information on managing organization unit administrators, refer to the [Maintain Organization Unit Administrators](#) topic.**

8. Click **Advanced** to access the Create Organization Unit page (optional).
9. Enter the following, the appropriate information.
10. Click **Create** to create the organization unit.

## Create Organization Unit

An asterisk (\*) denotes a required field

### Details

<b>Name*</b>	<b>Code*</b>	<b>Parent</b>	<b>Billing Group</b>
<input type="text" value="Safety and Industrial Health"/>	<input type="text" value="SA-IH"/>	<input type="text" value="Sandbox"/> <input type="button" value="Select"/>	<input type="text"/>

### Description:

This central organization handles all safety and industrial health for the entire company.

### Address

<b>Address Type</b>	<b>Address1</b>	<b>Address2</b>
<input type="text" value="Business"/>	<input type="text" value="8912 Anderson Corporate I"/>	<input type="text"/>
<b>City</b>	<b>State</b>	<b>Country</b>
<input type="text" value="Nashville"/>	<input type="text" value="TN"/>	<input type="text" value="USA"/>
<b>ZIP Code</b>	<b>ZIP 4</b>	
<input type="text" value="37128"/>	<input type="text" value="5689"/>	

### Phone

<b>Phone Type</b>	<b>Phone Number</b>	<b>Extension</b>	<b>Country</b>
<input type="text" value="Work"/>	<input type="text" value="615.786-7890"/>	<input type="text"/>	<input type="text" value="USA"/>

### Organization Unit Administrators

Place an Administrator(s) over this Organization Unit.

Name
Lamont, Jill Karen

*Creating an organization unit*

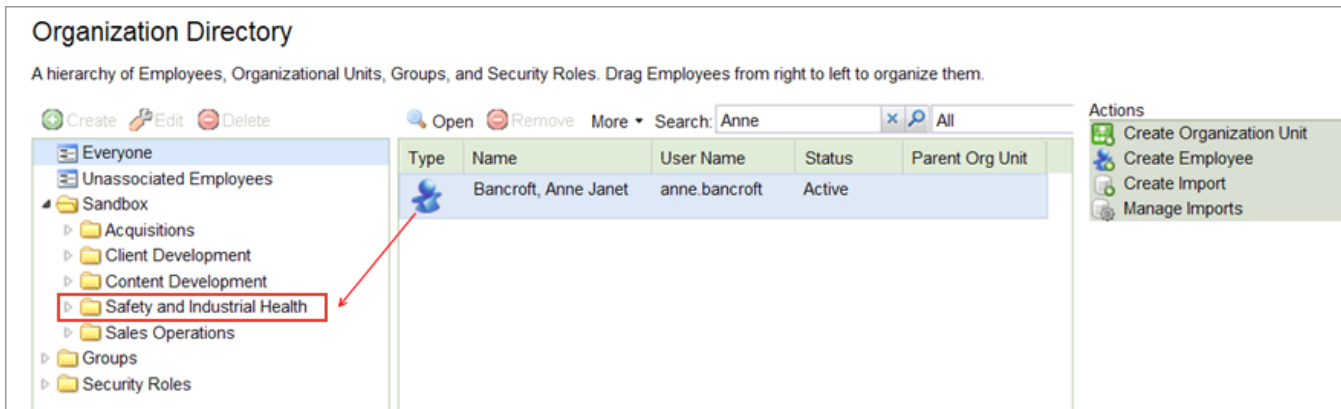
## Add Employees to Organization Units

<b>Affected roles:</b>	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
------------------------	---

This task includes instructions for adding employees to organization units.

1. Click the **People** link in the menu bar. The Organization Directory page appears.
2. In the organization hierarchy, select **Everyone**. Select the employee(s) from the list, drag and drop the employee into the Client or Organization Unit folder.

3. To remove a name from any of the folders, click on the folder name, click on the name to be removed, and select **Remove**.



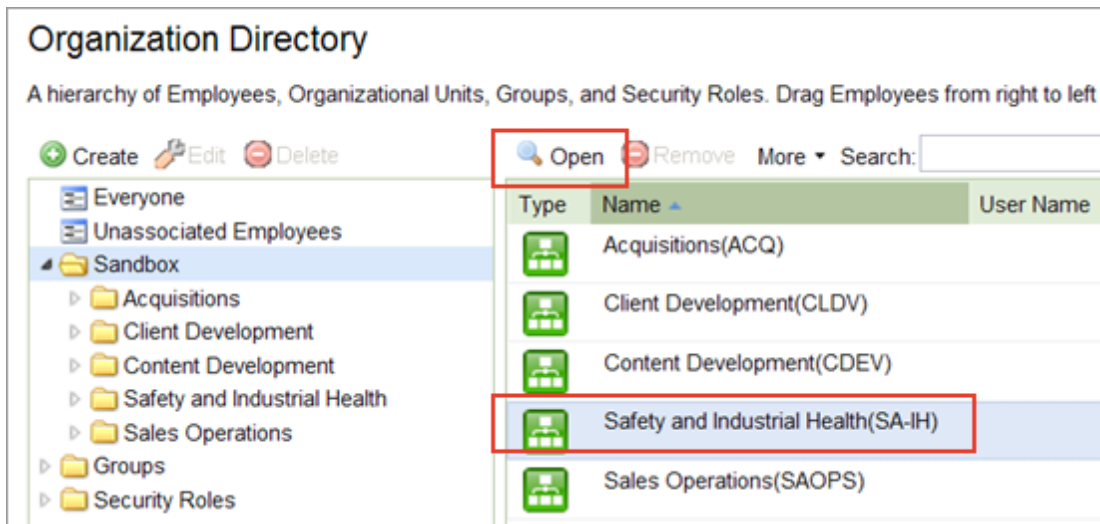
Adding employees to an organization unit

## Edit Organization Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for editing organization units.

1. Click the **People** link in the menu bar. The Organization Directory page appears.
2. Highlight the organization unit to be edited. The edit option will not be enabled until the unit is selected.



Opening an organization unit

3. Click **Edit**. The Edit Organization Unit dialog box appears.

Safety and Industrial Health

**Actions**  
 Assign Training
 Edit
 Delete
 Assign Administrator

**Details**

Name	Code	Parent	Billing Group
Safety and Industrial Health	SA-IH	Sandbox	

**Description**  
This central organization handles all safety and industrial health for the entire company.

*Editing an organization unit*

4. Make any basic or advanced changes to the selected organization unit.
5. In the Organization Unit Administrators grid, select **Add**. The Add People selection grid appears.
6. Search and select the desired people.
7. Click **OK**.



**People in the Organization Unit Administrators section must have organization unit administrator security roles. For more information on managing organization unit administrators, refer to the [Maintain Organization Unit Administrators](#) topic.**

8. After making the desired edits, click **Save**.

## Delete Organization Units

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for deleting organization units.

1. Click the **People** link in the menu bar. The Organization Directory page appears.
2. Highlight the organization unit to be deleted.
3. Select **Delete**. A delete confirmation prompt appears.
4. Select **Yes**. The selected organization unit is removed from the organizational hierarchy.



Safety and Industrial Health

**Actions**  
 Assign Training  
 Edit  
 **Delete**  
 Assign Administrator

---

**Details**

<b>Name</b>	<b>Code</b>	<b>Parent</b>	<b>Billing Group</b>
Safety and Industrial Health	SA-IH	Sandbox	

**Description**  
This central organization handles all safety and industrial health for the entire company.

**Contact**

<b>Address</b> <b>Type: Business</b> 8912 Anderson Corporate Drive Nashville, TN 37128-5689 USA <span style="float: right; color: green;">✓</span>	<b>Phone</b> <b>Type: Work</b> 615.786-7890 USA <span style="float: right; color: green;">✓</span>
--	---

*Deleting an organization unit*

## Maintain Organization Unit Administrators

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators
-----------------	--

An Organization Unit Administrator administers specific organization units through organization unit-specific roles. These roles have specific permissions limiting the ability of users with those roles to only manage the organization units they administer. System Administrators are able to assign organization unit-specific administrators to sections of the hierarchy. These administrators are able to make assignments and manage employees, but they are limited to the organization units they control.

### Managing Organization Unit Administrators

System Administrators manage organization unit administration roles like any other security role. To see more detailed steps on managing roles, refer to the following topics:

- [Create Security Roles](#)
- [Edit Security Roles](#)
- [Delete Security Roles](#)

### Assigning Organization Unit Administrators

System administrators assign users with organization units-specific permissions to organizations units. Once organization unit administrators are assigned to the they can perform the functions for that unit and other units in its hierarchy. Organization unit management includes assigning roles, making assignments, and creating users. For steps to assign organization unit administrators to organization units, refer to the [Create Organization Units](#) topic.

## Maintain Employees

PureSafety's Learning and Safety Management System (LSMS) contains a directory of employees for a company. In the Organizational Directory, each employee has an employee profile. Each profile allows for the following information:

- Biographic Information
- User Account Information

- Contact Information

An employee can have an employee profile without being a user in the LSMS. This allows a company to import all their employees from an HR directory and then select the individual employees that need to access the LSMS and assign them user accounts.. The LSMS allows a client to maintain all employee information easily from a central location. An administrator also has the ability to manage an employee by assigning training, editing information, sending the employee messages, running reports, and deleting as necessary.

A user account is required in order to allow access to the LSMS. While all employees for the company are set up in the system, all may not need access to the LSMS or be required to take training; therefore, a user account is not required. While the number of employees that can be set up is unlimited, the number of users are limited based on the client's contract with PureSafety.

**Example A**

Company A recently subscribed to PureSafety's LSMS. Bill, an employee with Company A, needs training on Bloodborne Pathogens.

1. To provide him access to the LSMS, the system administrator creates the employee profile and sets up a corresponding user account for that employee.
2. The administrator provides Bill with his own user name and password.
3. Using these credentials, Bill logs into the LSMS and takes his required training.

**Example B**

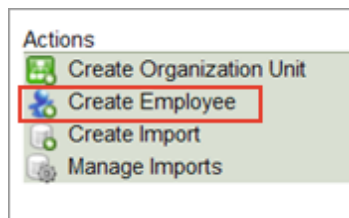
Company B recently subscribed to PureSafety's LSMS. John, who is a remote user without Internet access, needs a required Introduction to CPR/AED class for his recertification. The Training Administrator creates an employee profile for John to track his training completion. In this case, the training administrator needs a way to track John's certification. John, however, does not need a user account because he cannot access the Internet to access the LSMS.

## Create Employees

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

When creating an employee, it is important to remember that an employee also needs a user or website account to access the system.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. Form the Actions menu, select **Create Employee**.



*Create Employee link*

3. On the Create New Employee page, enter the appropriate information. Note: The trainee security role is the default role for all new users.
4. Selecting **Save** creates the employee. Upon successfully creating an employee, the system displays the record created in the Organization Directory.

## Create New Employee

An asterisk (\*) denotes a required field

### Identification

<b>Prefix</b>	<b>First Name *</b>	<b>Middle Name</b>	<b>Last Name*</b>	<b>Suffix</b>	<b>Employee Code</b>
Mr. <input type="text"/>	Manuel <input type="text"/>	Noel <input type="text"/>	Ortega <input type="text"/>	II <input type="text"/>	783-179-156 <input type="text"/>

### Website Account

<b>User Name</b>	<b>Culture</b>	<b>Time Zone</b>	<b>Active</b>
Manuel.Ortega <input type="text"/>	English <input type="text"/>	Central Standard Time <input type="text"/>	<input checked="" type="checkbox"/>
<b>Password</b>	<b>Confirm Password</b>	<b>Force Password Change at Next Login</b>	
..... <input type="text"/>	..... <input type="text"/>	<input type="checkbox"/>	

### Advanced Options

### Personal Information

<b>Birth Date</b>	<b>Hire Date</b>	<b>Release Date</b>	<b>Work Location</b>
01/12/1969 <input type="text"/>	06/08/1999 <input type="text"/>	<input type="text"/>	SA-IH <input type="text"/>
<b>Manager</b>			
Lamont, Jill Karen <input type="text"/> <input type="button" value="Select"/>			

### Primary Address

<b>Address Type</b>	<b>Address 1</b>	<b>Address 2</b>
Business <input type="text"/>	Anderson Corporate Drive <input type="text"/>	<input type="text"/>
<b>City Name</b>	<b>State Name</b>	<b>Country</b>
Nashville <input type="text"/>	TN <input type="text"/>	USA <input type="text"/>
<b>ZIP Code</b>	<b>ZIP 4</b>	
37128 <input type="text"/>	5689 <input type="text"/>	

### Primary Phone

<b>Phone Type</b>	<b>Phone Number</b>	<b>Extension</b>	<b>Country</b>
Work <input type="text"/>	615-786-7890 <input type="text"/>	156 <input type="text"/>	USA <input type="text"/>

### Primary E-mail Address

<b>E-mail Type</b>	<b>E-mail Address</b>
Work <input type="text"/>	manuel.ortega@sandboxin <input type="text"/>

*Creating a new employee*

## Edit Employees

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for editing employees.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, select **Everyone**.
3. Select an employee by double clicking the name.

Type	Name	User Name	Status	Parent Org Unit
	Lamont, Jill Karen	Jill.Lamont	Active	
	Ortega, Manuel Noel	Manuel.Ortega	Active	

Opening an employee record

4. From the Employee Detail page, click on **Edit** from Actions.

Ortega, Manuel

**Information**

<b>Full Name</b> Mr. Manuel Noel Ortega II	<b>Employee Code</b> 783-179-156	<b>Birth Date</b> 1/12/1969	<b>Hire Date</b> 6/8/1999
<b>Work Location</b> SA-IH	<b>Manager</b> Jill Lamont		

**Website Account**

<b>User Name</b> Manuel Ortega	<b>Account Status</b> Active	<b>Culture</b> English
<b>Time Zone</b> Central Standard Time	<b>Force Password Change at Next Login</b> False	

**Actions**

- Assign Training
- Edit**
- Send Message
- Security Roles
- Delete
- Parent Organization Units and Groups
- Active Assignments

Editing an employee record

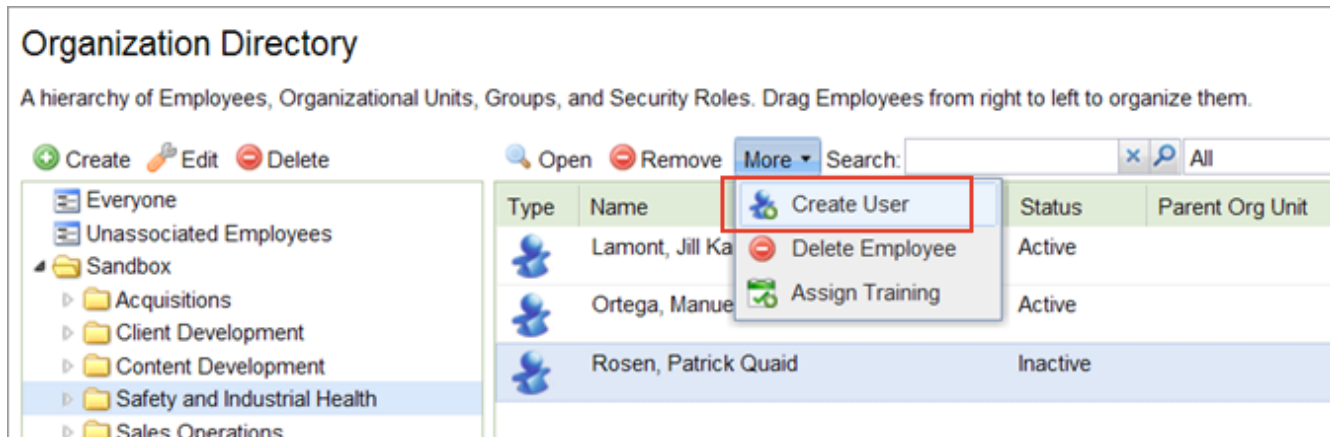
5. Enter changes.
6. Selecting **Save** saves the changes to the employee.

## Create Users from Employees

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

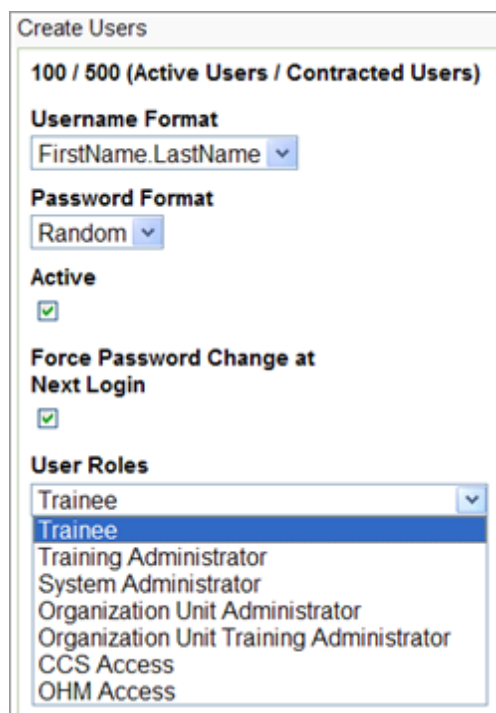
This task includes instructions for editing employees.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. Highlight the desired users.



*Creating User menu*

- From More, select **Create User**. The Create User box appears.
- Select a User name format. By default, the System selects Firstname.Lastname. To chose another select from the drop-down menu.
- Select a Password format. By default, the System selects a random password. To chose a custom password, select from the available options in the drop-down menu.
- Select the Active checkbox to make users active. By default, new users are inactive.
- Select a Security Role for the user. By default, the System selects Trainee. To chose a different role, select from the available options in the drop-down menu.
- Select **Submit** to create the users.



*Create a user from an employee*

## Delete Employees

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

Administrators can delete any employee that does not have an assignment history associated with their account. Also, if employees have user accounts created with their employee profile they cannot be deleted. This task includes instructions for editing employees.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, select **Everyone**.
3. Select an employee by double clicking the name.
4. From the Employee Detail page, click on **Delete** from Actions. The Confirm Delete dialog box appears.

**Rosen, Patrick**

**Information**

<b>Full Name</b>	<b>Employee Code</b>
Mr. Patrick Quaid Rosen	187-777-389

**Website Account**

User account has not been created.

**Actions**

- Assign Training
- Edit
- Send Message
- Delete**
- Parent Organization Units and Groups
- Active Assignments

*Deleting an employee*

5. Selecting **Yes** deletes the employee.

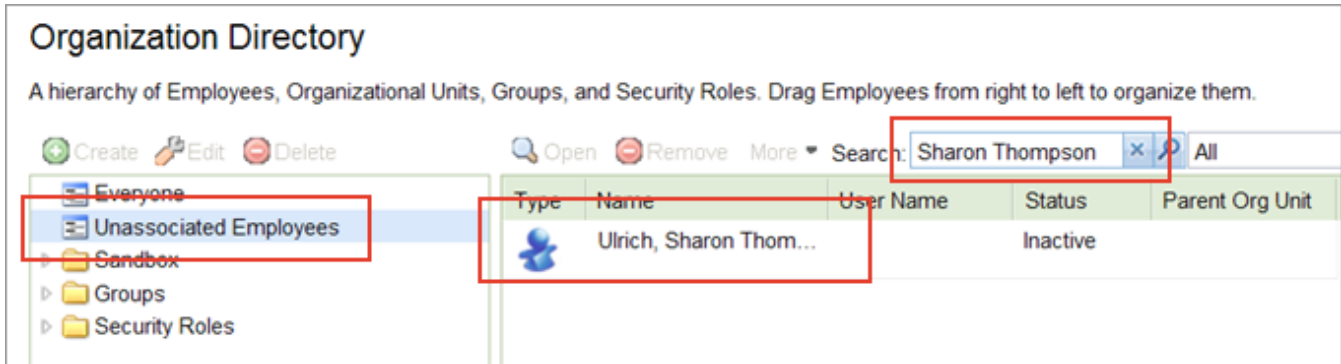
## Associate Unassociated Employees

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

The Unassociated Employee view is a filter of the Organizational Directory. The Unassociated Employee view allows administrators to view employees that have been created and not added to an organizational unit. It also offers the administrators an easy method for associating employees to organizational units. This task includes instructions for maintaining unassociated employees.

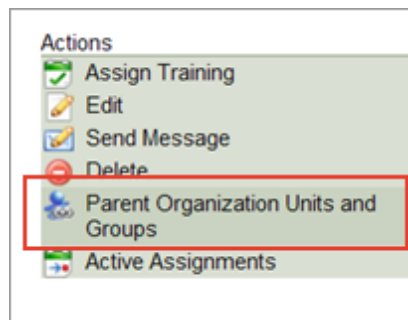
1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, select **Unassociated Employees**. The main grid filters to only employees that are not in organization units. Select employee(s) (more than one employee may be selected by pressing and holding down the Ctrl key on the keyboard and clicking the name(s), then drag and drop the selected name(s) to the desired organization units.

Or select an employee. Click **Open**.



Filtering for an unassociated employees

3. From the Employee Detail page, click on **Parent Organization Units and Groups** from Actions.



Parent Organization Units and Groups link

4. Click **Add** then select organization units and groups.

5. Click **Add** to save the changes to the employee.



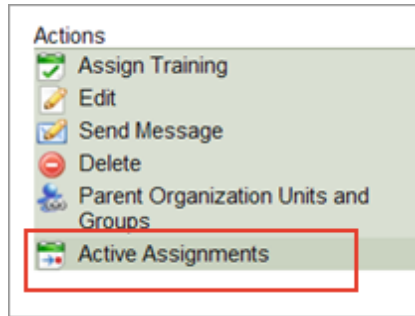
Adding an employee to a parent organization unit

## View Active Assignments

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for viewing a trainee's active assignments.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, select **Everyone**.
3. Select an employee by double-clicking the name.
4. From the Employee Detail page, click **Active Assignments** from Actions. The Training Details report opens as a .pdf document.



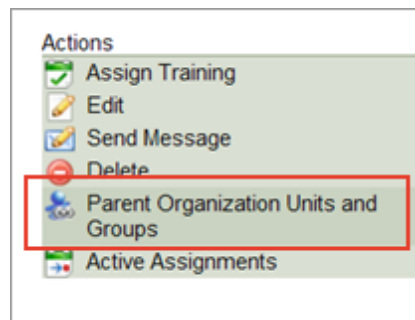
Active Assignments link

## View Organization Units and Groups

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for viewing employee's organization units and groups.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, select **Everyone**.
3. Select an employee by double clicking the name. The Employee Detail page appears.
4. From the **Actions** menu, select **Parent Organization Units and Groups**. The Parent Organization Units and Groups appear.



Parent Organization Units and Groups link

## Maintain Groups

From the Organizational Directory management page, users with appropriate permissions (e.g., System Administrator) have access to the Groups folder from the Hierarchy menu. Groups allow users to organize individuals (who reside in different areas of the organization) and organizational units that share a specific purpose or commonality. While an employee can be in more than one group, groups are not a part of an organization's hierarchy, and the user may not place a group within the hierarchy.

Below are several examples of how you can use groups at your organization.

### **Example of a group containing various employees:**

Company A has several subsidiaries across the country. All subsidiaries require similar training for OSHA record keeping. In this case:



1. Bill, Company A's Training Administrator, creates two groups: Full-Time employees and Part-Time employees.
2. After he adds all applicable employees into each group, Bill can assign training to each group without having to assign the training to each employee.

**Example of groups containing entire organizational units:**

Company A sets up its hierarchy based on geographic locations. Bill, the System Administrator, has created three organizational units: Chicago, Boston, and New York. Now, Company A requires that every employee should be CPR-certified. As a result:

1. John, the Training Administrator, creates a group called Uncertified to capture all employees who do not have their CPR certifications.
2. John uses the Uncertified group to assign offline CPR training sessions to all employees at each location and thus doesn't have to assign training to each employee individually.

**Example of an employee in multiple groups:**

Frank is the Site Manager for the Southeast Division of Company A and is the Sales Manager for his region. John, the System Administrator for Company A, requires the site managers to have safety training, and he requires the sales managers to have some sales-related training. In this case:

1. John decides to create two groups: Site Managers and Sales Managers.
2. Then, he adds Frank to both groups.
3. John can use these groups to assign safety or sales-related training to these employees without having to assign the training to each employee individually.

**Example of groups that serve for an anticipated (or planned) purpose:**

Company A is planning to open a new office in Seattle. As a result:

1. Bill, the Training Administrator for Company A, creates a New Employee Orientation course for future new hires.
2. He also creates a group called New Hires to manage all employees who are new hires regardless of the organizational unit to which they belong.

**Example of groups that serve an ad hoc (or one-time) purpose:**

Scott, the Department Manager for Company A, requested that five of his crew members get training on Hearing Protection by the end of the day. In this case:

1. Bill, Company A's Training Administrator, can quickly (and easily) create an ad hoc group called Hearing Protection Group to satisfy Scott's request.
2. After each employee completes the training, Bill deletes the Hearing Protection Group.

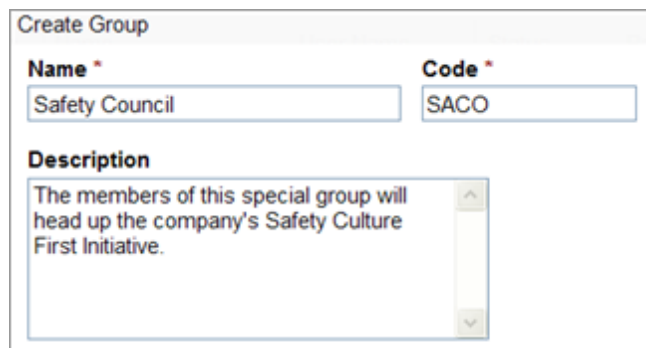
## Create Groups

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating groups.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organization hierarchy, select **Groups**.

3. Click **Create**. The Create option will not be enabled until the Groups folder is selected. The Group Properties window appears. Enter the appropriate information.
4. Clicking **Save** creates the new Group. Once the Group is created, add employees to the Group by clicking on Everyone. Highlight the employee(s) or Organizational Unit(s) to be added to the Group. More than one may be selected at a time by pressing and holding down the Ctrl key on the keyboard and clicking the name(s). Drag and drop the selected name(s) to the Groups folder.



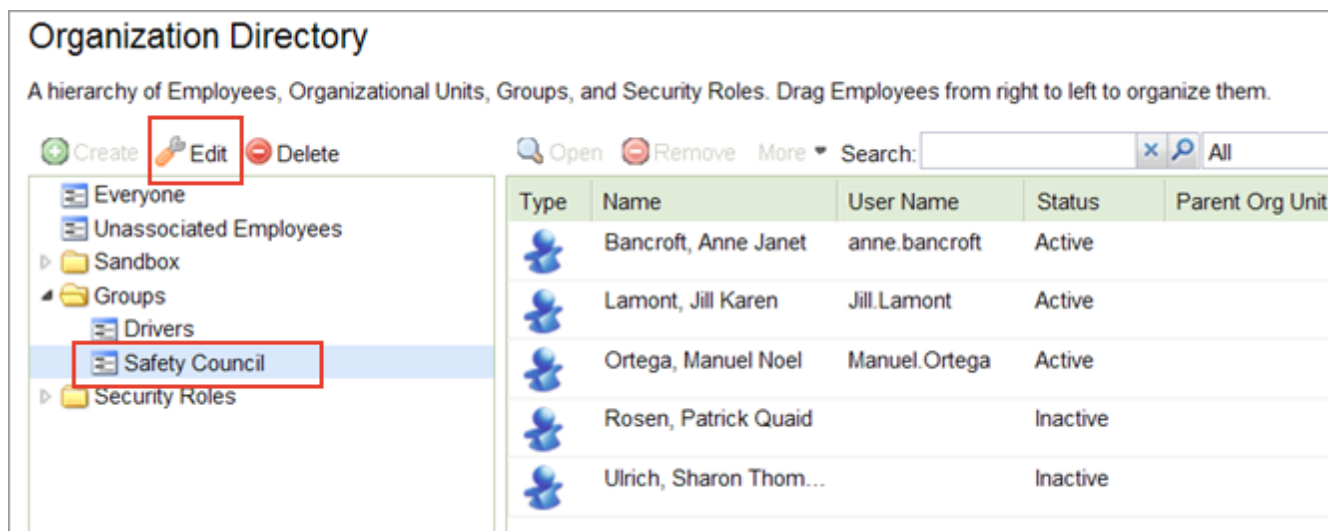
Creating a group

## Edit Groups

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for editing groups.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, click the arrow to the left of Groups. Highlight the Group to edit by clicking once on the name. The Edit option will not be enabled until a Group is selected. Select **Edit** from the Menu. The Group Properties window will open. Or, double-click the group name from the main grid.

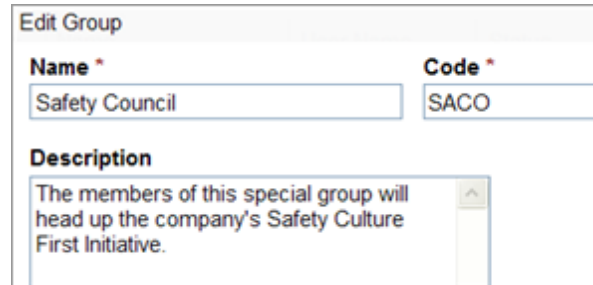


Type	Name	User Name	Status	Parent Org Unit
	Bancroft, Anne Janet	anne.bancroft	Active	
	Lamont, Jill Karen	Jill.Lamont	Active	
	Ortega, Manuel Noel	Manuel.Ortega	Active	
	Rosen, Patrick Quaid		Inactive	
	Ulrich, Sharon Thom...		Inactive	

Selecting to edit a group

3. Enter edits to the **Name**, **Code**, and/or **Description** fields.

4. Clicking **Save** saves the edits to the Group.



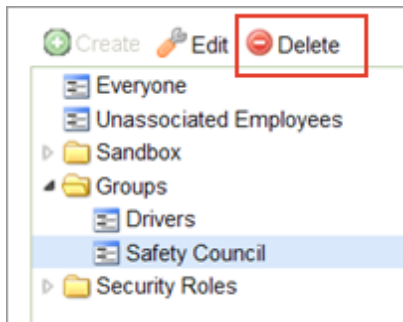
*Editing a group*

## Delete Groups

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To delete a group, complete the following steps. A group cannot be deleted if members of the group have training assigned through the group with a status of In Progress. The assignment must have a status of Complete or be marked as excused.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organizational hierarchy, click the arrow to the left of Groups.
3. Highlight the group to delete.
4. Select **Delete** from the Menu. A delete confirmation prompt appears.
5. Select **Yes**. The selected group is removed from the Organization Directory.



*Deleting a group*

## Maintain Security Roles

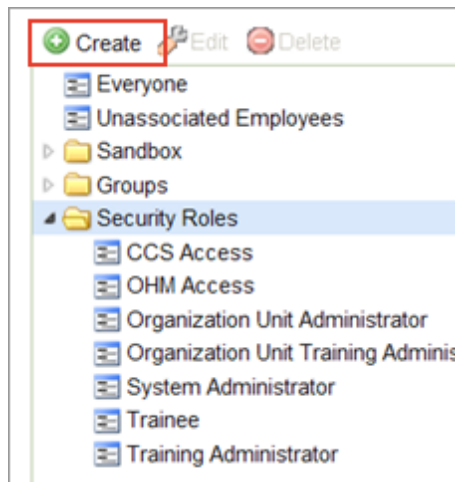
A security role is a defined set of permissions assigned to a user. The System Administrator can create a role. Creating a role requires providing a name, as well as selecting permissions. Permissions are page accesses or function controls set up by PureSafety that can be applied to Roles. From the create/edit roles page, the System Administrator also has the ability to assign a role to users. There are three standard roles, System Administrator, Training Administrator, and Trainee.

## Create Security Roles

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for creating security roles.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organization hierarchy, select Security Roles.
3. Select **Create**.



*Creating a security role*

4. Enter the appropriate information. Once the Role is created, add employees to the Role by clicking on Everyone. Highlight the employee(s). Drag and drop the selected name(s) in the Role. From an Employee Detail page, the user can view security roles and the employee to security roles.

Create Role

**Name\***

Safety Management

**Description**

This role allows all users who have a hand in the safety management...

Allow	Permission
<input checked="" type="checkbox"/>	Manage Messages
<input checked="" type="checkbox"/>	View Standard Reports
<input type="checkbox"/>	Manage Roles
<input type="checkbox"/>	Assess Offline Sessions
<input type="checkbox"/>	Assign to Me
<input type="checkbox"/>	Hide or Show Training
<input type="checkbox"/>	Manage Assignments
<input type="checkbox"/>	Manage Employees
<input type="checkbox"/>	Manage Messages

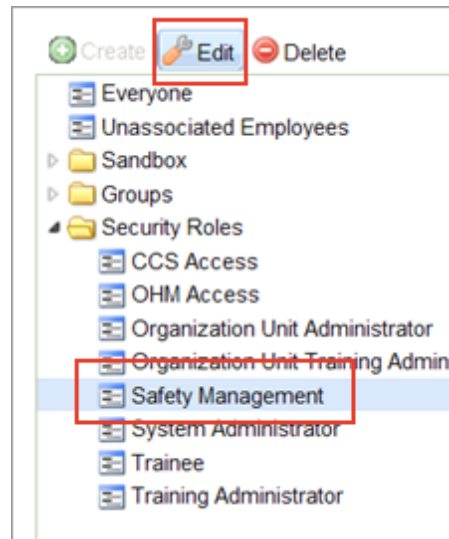
*Creating a role*

## Edit Security Roles

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

This task includes instructions for editing security roles.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.
2. In the organization hierarchy, select **Security Roles**.
3. Highlight the Role to be edited. The Edit option will not be enabled on the menu until a Role is selected. The Edit Role dialog box will open. Apply changes as necessary to Properties.



Editing a security role

4. Clicking **Save** saves the edits to the Role.

 A screenshot of the 'Edit Role' form. The title is 'Edit Role'. There are two input fields: 'Name\*' containing 'Safety Management' and 'Description' containing 'This role allows all users who have a hand in the safety management...'. Below these is a table with a dropdown menu set to 'Allow' and a 'Permission' column. The permissions listed are: 'Manage Organization unit Administrator' (unchecked), 'Display and Print CEU Credits' (unchecked), 'Import Presentation Training Unit' (checked), 'OHM Signon' (checked), 'Delete Presentation' (checked), 'Copy Presentation' (checked), 'Edit Presentation' (checked), and 'Create Presentation' (checked).

Editing security roles

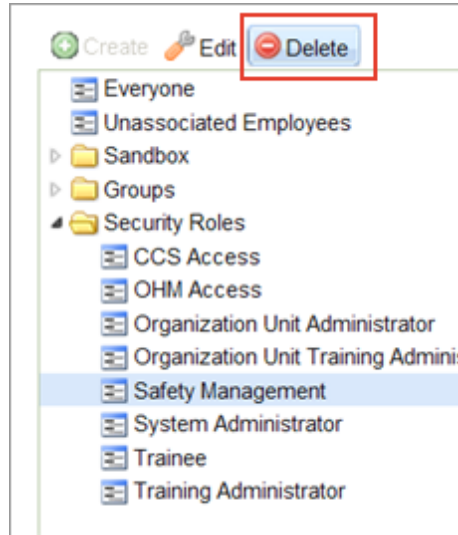
## Delete Security Roles

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

To delete a security role, complete the following steps. To delete a security role, you must first remove all employees from the role.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.

2. In the organizational hierarchy, click the arrow to the left of Security Roles.
3. Highlight the security role to delete. Note: You cannot delete system default security roles.
4. Select **Delete** from the Menu. A delete confirmation prompt appears.
5. Select **Yes**. The selected security role is removed from the Organization Directory.



*Deleting a security role*

## Create Imports

Affected roles:	System Administrators
-----------------	-----------------------



**We recommend contacting PureSafety Customer Support prior to creating an import in the LSMS for the first time.**

This task includes steps for creating employee and hierarchy imports.

1. Click the **People** link in the menu bar. The Organizational Directory page appears.



*Create Import link*

2. Click **Create Import**. The Create New Import Job page appears.
3. Provide the applicable schedule information.
4. Provide the applicable file information.
5. Provide the e-mail information, if applicable.

6. Click **Create**.

### Create New Import Job

An asterisk (\*) denotes a required field

#### Import Schedule

Set a date and a repeat interval to upload your import

<b>Schedule Date *</b>	<b>Repeat</b>	<b>Repeat End Date</b>
<input type="text" value="05/05/2010"/>	<input type="text" value="Weekly"/>	<input type="text"/>

#### Data to Import

Select a file to import. Use the [sample template](#) or configure the settings to match your file format.

<b>File Name *</b>	<b>File Format</b>	<b>Sample Templates</b>
<input type="text"/> <input type="button" value="Browse..."/>	<input type="text" value="Excel"/>	<a href="#">Click to download</a>
<b>Field Delimiter</b>	<b>Text Delimiter</b>	<b>Import Type</b>
<input type="text" value="Comma"/>	<input type="text" value="Single Quote"/>	<input type="text" value="Employee"/>
		<b>Email Results To</b>
		<input type="text" value="Jill.Lamont@sandboxinc.cc"/>

*Creating a new import job*



**Part**

---

**VI**

# **Understanding the Reports Directory**

## Understanding the Reports Directory

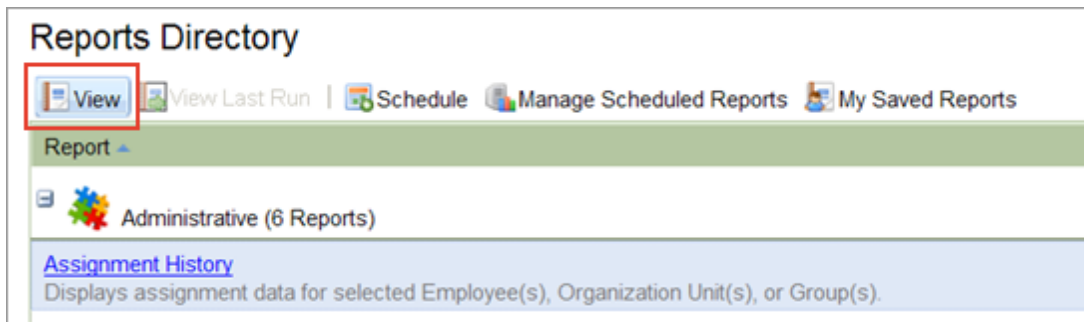
The Reports Directory allows users with appropriate permissions to run, view, or export reports based on selectable parameters. Users may select a report from the grid or search for a specific report.

### Run a Report

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

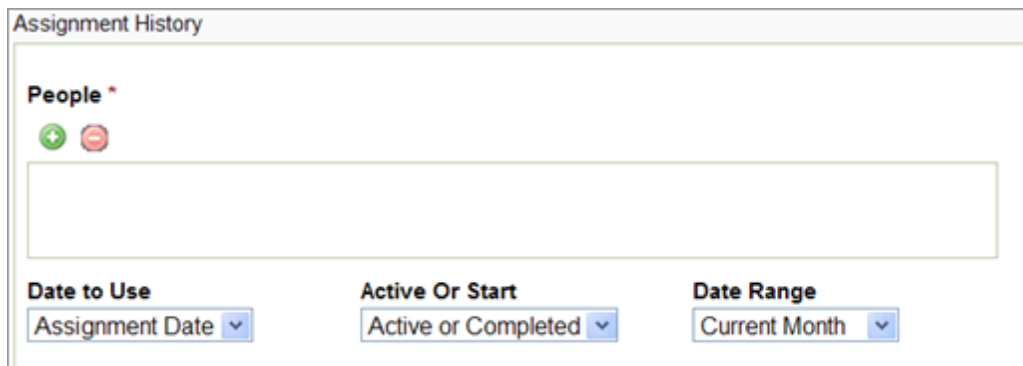
When users run a report in the system, they can see the results displayed in HyperText Markup Language (HTML).

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.
2. Highlight the desired report.
3. Click **View**, or double-click the desired report. The Parameters page appears. Here, users set report parameters and select the format in which they wish to view the report. They also have the option to schedule reports and send them via e-mail to other users.



Viewing a report

4. Define the report parameters.



Defining report parameters

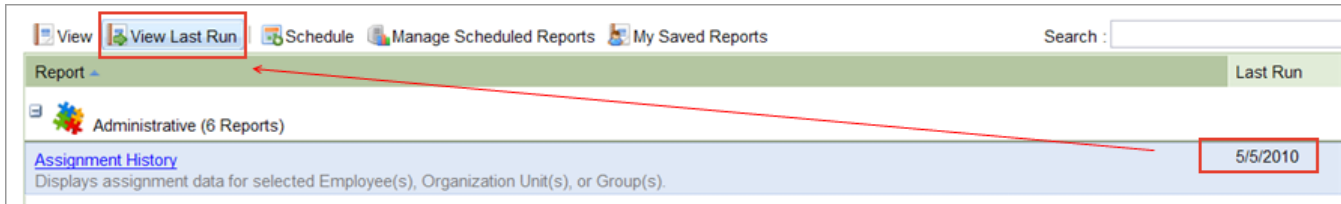
5. Click **Run**. The selected report appears.

### View the Last Run Report

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

Users can quickly see the last report they ran in the system, using the same parameters.

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.
2. Highlight the desired report.
3. Click **View Last Run**.



*Viewing a last run report*

## Export a Report

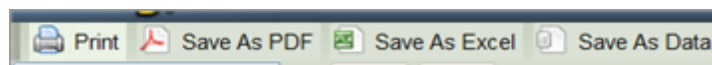
Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

Users have the added capability to export a report's results. The options include printing the report or saving it as a PDF, Excel, or Data file.

- PDF. This option exports and displays the results of the report in Adobe's Portable Document Format (PDF).
- Excel. This option exports and displays the results of the report formatted in a Microsoft Excel (.XLS) spreadsheet.
- Data. This option exports the report data and displays a pure "data dump", that is, an unformatted report containing data in a Microsoft Excel (.XLS) spreadsheet without any graphs or charts.

To see a complete list of available reports and their descriptions, refer to the [Review Released Reports](#) topic.

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.
2. Highlight the desired report.
3. Click **View**.
4. Set parameters.
5. Click **Run**.
6. Select one of the following export options:
  - a. Print
  - b. Save as PDF
  - c. Save as Excel
  - d. Save as Data



*Exporting a report*

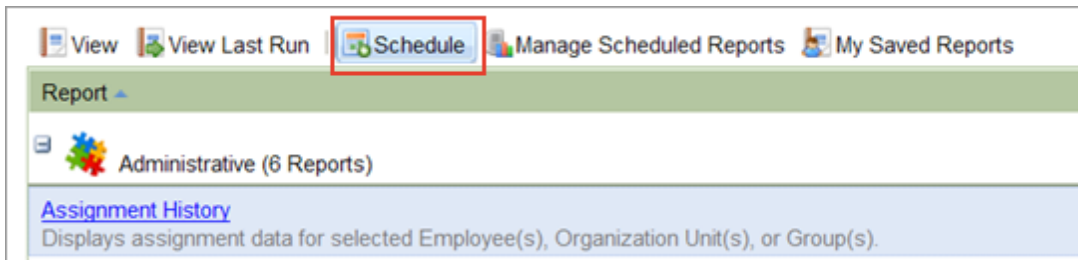
## Schedule a Report

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

You can schedule a report in three different ways, as outlined below.

### From the Reports Directory:

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.
2. Highlight the desired report.
3. Click **Schedule**.



*Schedule button*

4. On the Schedule Report page, provide the necessary information.
  - You can use the **Repeat Every** field to determine when and how often you want the report to run.
5. Click **Save** to schedule the report.

## Assignment History

### Job Title\*

Assignment History

### Report Parameters

#### People \*



Lamont, Jill Karen

#### Date to Use

Assignment Date

#### Active Or Start

Active or Completed

#### Date Range

Current Month

### Training



No Training Selected

### Assignment



No Assignment Selected

#### Employee Status

Active and Inactive

#### Show Training

Required

#### Level of Detail

Summary Level

### Category



No Category Selected

### Assignment Status



No Assignment Status Selected

### Printing Options

Standard Page Break

### Schedule

#### Start Date\*

05/05/2010

#### Start Time\*

8 : 00 AM

#### End Date

#### Repeat Every

Day(s)

#### Day of the Month

#### Day(s) of the Week

Sunday

Monday

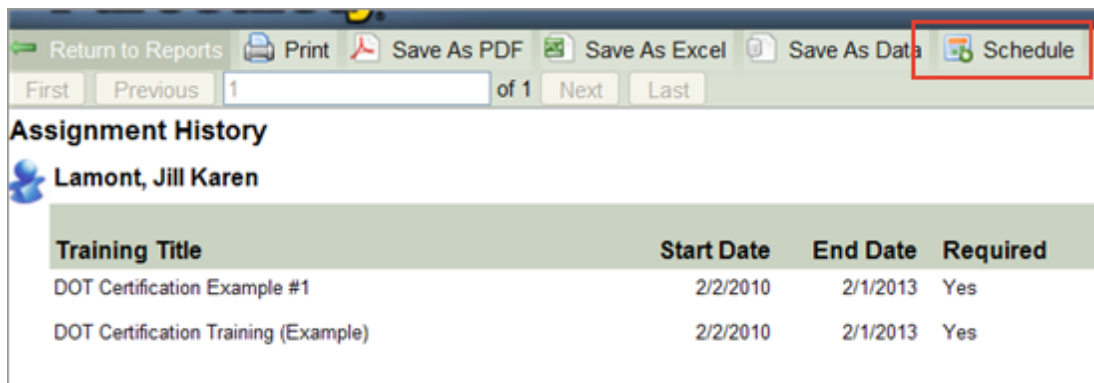
Tuesday

### From a report's parameters' page:

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.
2. Highlight the desired report.
3. Click **View**. The parameters' page appears for the selected report.
4. Select report parameters as desired.
5. Click **Schedule**.
6. On the Schedule Report page, provide the necessary information.
  - You can use the **Repeat Every** field to determine when and how often you want the report to run.
7. Click **Save** to schedule the report.

### From a run report:

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.
2. Highlight the desired report.
3. Click **View**. The parameters' page appears for the selected report.
4. Define the report parameters.
5. Click **Run**. The report appears.



*Scheduling from a run report*

6. From the report, click **Schedule**.
7. On the Schedule Report page, provide the necessary information.
  - You can use the **Repeat Every** field to determine when and how often you want the report to run.
8. Click **Create** to schedule the report.

## Save a Report

Affected roles:	System Administrators, Training Administrators, Organization Unit Administrators, Organization Unit Training Administrators
-----------------	---

1. Click the **Reports** link in the menu bar. The Reports Directory page appears.

2. Highlight the desired report.
3. Click **View**. The parameters' page appears.
4. Define the report parameters.
5. Click **Run**. The report appears.
6. From the run report, click **Add to My Save Report List**. The Add to My Save Report List appears.
  - a. Name the report.
  - b. Provide a description.
7. Click **Save**.

## Review Available Reports

This section includes descriptions of all the reports you can use in the LSMS.

### Assignments at a Glance Report

Users must select a specific assignment before running the Assignments at a Glance report. By default, the report runs for all the employees who have this assignment, but users can choose to run the report for a specific employee who was given this assignment. The report displays the employee name, start date, end date, whether the assignment is required, who assigned it, and the status of the assignment.

### Assignments Completed Under Minimum Time Report

The Assignments Completed Under Minimum Time report displays assignments completed under the minimum time set in training properties. The report includes all training, but users can select only one training, if desired. They may not select multiple training courses. The report includes organization unit name, employee name, training title, start date, end date, completed date, time spent on the assignment, minimum time spent on the assignment, and variance.

### Assignment History Report

The Assignment History report displays assignment data for selected employees, organization units, or groups. By default, it includes all training units and assignments, but users can also run it for specific training units or assignments. The parameter options allow users to run the report based on assignment date, completion date, or overdue date. The report is grouped by employee and displays the training title, start date, end date, whether the assignment is required, time spent on it, status, and completed date. For each employee, the Employee Summary section displays the total number of training units and total time spent on assignments. The report summary displays the total training units and total time spent on them for all employees selected for the report.

### Certifications Report

The Certifications report displays the required and current certifications for a selected employee, organization unit, or group. Users may choose to run the report for only one employee, organization unit, or group. The report displays employee name, training title, start date, certification status, expiration date, and whether the certification is required.

## Completion Status Report

The Completion Status report calculates the completion percentage for selected employees, organization units, or groups for a specified date range. Users may choose to include all training, only required training, or only optional training. The report displays the employee, organization unit, or group name. The percentage completed for each month and year appears in a separate column.

## Employee Details Report

The Employee Details report displays assignment information about selected employees, including demographic data, completion percentage, average test score, all open assignments, the last ten completed assignments, the last ten certifications, and the last ten tests employees have taken. Users may not run this report for organization units or groups. When users select more than one employee, the report displays one employee per page.

## Executive Training Summary Report

The Executive Training Summary report displays assignment completion statistics for selected employees, organization units, or groups. By default, the report includes all training units and assignments, but users may choose to include only specific training units or assignments. The report displays the training title, training type, the number of assignments that are completed, incomplete, or overdue, total number of assignments, percentage that has been completed, and percentage that is overdue.

## For CEU Credit Report

The For CEU Credit report displays the CEU credits earned by selected individuals. Users can group the data by people or training. The parameter options allow them to run the report based on people, employee status, and a specific date range.

## Hours Assigned Report

The Hours Assigned reports estimates the time it takes selected employees, organization units, or groups to complete assignments. The report displays the assignment name, employee name, start date, end date, whether the assignment is required, assignment type, and estimated time.

## Offline Training Detail Report

The Offline Training Detail report displays details about a specific offline training unit. Users must select a training unit from the list, which includes only offline training units. The report displays the offline training name, session date and time, session duration, openings, number of maximum attendees, employee ID, employee name, signature, status, score, and comments. If the training offers more than one session, the report displays details for each session.

## Offline Training Manifest Report

The Offline Training Manifest report provides the attendee list for a given training. Users must select an offline training unit from the list. The report displays the offline training name, session date and time, and the employees who are registered for it.

## People Assignments Report

The People Assignments report allows users to drill down to see more details about data on the [People Summary report](#). It displays the people included in the statistics users selected on that report. It displays employee names, active assignments (which include overdue and open assignments), and completed assignments for the last 30, 90,



and 365 days. When users run it from the Reports Directory, the report displays all assignment statuses for the selected individuals. Here, the number of open assignments for a particular employee includes all open assignments (including those that haven't been started, are in progress, or are overdue). The number of open items that are overdue appears in the Overdue column.

## People at a Glance Report

The People at a Glance report displays the training title, training type, start date, end date, status, and whether training is required for a given employee, organization unit, or group. Users may choose to run the report for only one employee, organization unit, or group. When the report is run for an organization unit or group, it displays the training title, start date, whether it is required, if it is completed, incomplete, or overdue, total number of training units, time spent in the system, time spent in training, completion status chart, and a training plan chart.

## People Summary Report

The People Summary report displays assignment completion statistics for selected employees, organization units, or groups. The report includes the following people assignment statuses: Completed, Overdue, Active, and No Assignments. Click any section of the pie chart to drill down to the [People Assignments report](#) for more details. The report displays a summary of the people selected and the percentages and numbers of people with completed assignments, overdue assignments, open assignments, and no assignments. The results are real-time. For example, if you run the report today at 8:00 AM and again at 3:00 PM, the results may vary depending on people's activity between those times. The number of people with open assignments includes those with assignments that haven't been started yet and those with assignments that are in progress. It does not include overdue assignments.

## Question at a Glance Report

The Question at Glance report is accessed by drilling down from the [Training at a Glance](#) report. When viewing a test or survey in the Training at a Glance Report, select any question to see the Question at a Glance report. This report displays the date the test or survey was last modified, the selected question, and all potential answers, including correct answers in bold. An answer distribution pie chart displays how often each answer is selected.

## System Usage Summary Report

The System Usage Summary report displays a summary of system usage data for selected employees, organization units, or groups. The report is grouped by people and displays actual time in the system, average time per user, and percentage of users that logged in.

## Tests Completed Under Minimum Time Report

The Tests Completed Under Minimum Time report displays tests completed under the estimated minimum time by employees, organization units, and groups. The report includes all tests, but users can select only specific tests, if desired. The report displays the organization unit, employee name, test, completed date, time spent on the test, minimum time spent on the test, and variance.

## Test Scores Report

The Test Scores report displays the following information for selected tests: test names, people, whether they passed the test, average score for the first, second, and other attempts.

## Test Summary Report

The Test Summary Report displays the percentage and count of passed and failed attempts for selected tests. The parameter options allow users to run the report based on specific tests, people, a given date range, and employee status.

## Top Training Titles Report

The Top Training Titles report displays the top 5, 10, or 25 training titles based on the parameter selection. The total number of assignments for the selected people is used to calculate which title is the top training title. Based on this selection, the report displays a stacked bar graph of percentage of assignment statuses for each of the top training titles.

- Open status includes assignments that haven't been started yet and assignments that are in progress. It does not include overdue assignments.
- Overdue status includes assignments that haven't been started yet as well as assignments that are in progress and that are overdue.

From this report, users can drill down to training status details or training details.

## Training Assignment Report

The Training Assignments Report displays the number of overdue, open, and completed assignments for each training title that has been assigned to selected employees, organization units, or groups. By default, the report includes all assignment statuses, but users can run the report only for an individual status (Completed, Overdue, or Open).

## Training at a Glance Report

The Training at a Glance report displays training data for a selected training. Users must select a training to run this report. The report displays training name, type, content, employees to whom it's assigned, when it was assigned, whether it is required, if it has a parent training, and the type. The two charts on this report show estimated time and average actual time. When running the report for a test or a survey, users can drill down to the Question at a Glance report to see questions and answers.

## Training Data for Export Report

The Training Data for Export report provides employee and training data that users can export. By default, it includes all training and assignments, but users may choose specific training units and assignments, if desired. The report displays the following information for selected employees, organization units, or groups: external unique ID, unit ID, login name, first name, last name, e-mail address, parent, assignment ID, training title, whether it is required, status, start date, end date, and completed date.

## Training Details Report

The Training Details report displays open, overdue, and completed assignments for the selected training. It also displays certification and test score details, if applicable.

## Training Status Details Report

Users must select a training unit to run the Training Status Details report. By default, the report includes all assignment statuses, but users can run it for a specific status (Completed, Overdue, or Open). The report displays employee name, end date, time spent on the assignment, status, days it is overdue, and completed date.

## Training Usage Summary Report

The Training Usage Summary report displays the people, month and year, training time, average time per user, and percentage of users who took training for the selected employees, organization units, or groups. The report includes only required training by default, but users may run it for all training or only optional training.

## Unassigned Trainee Report

The Unassigned Trainees report displays employees who do not have assignments in the selected date range. The report displays the organization unit and employee name.

## Usage Details Report

The Usage Details report displays the login date per employee, time they spent in training, and time they spent in the system for selected employees, organization units, or groups. It is grouped by employee and by training.

## User Account Information Report

The User Account Information report displays organization unit, employee code, employee name, status, user name, e-mail address, and last login date for selected employees, organization units, or groups.



# Index

## - A -

Assignment History report 119

Assignments 60

    Create 61, 73

    Delete 84

    Edit 79, 80, 81, 82

    View active assignments 103

    View details 79

Assignments at a Glance report 119

Assignments Completed Under Minimum Time report 119

## - C -

Categories 84

Certification report 119

Completion Status report 120

Contact information 10

## - D -

Diploma

    Reprint 21

## - E -

Employee Details report 120

Employees 97

    Create 98, 100

    Delete 102

    Edit 100

    Member of... 104

    Unassociated 102

Executive Training Summary report 120

## - F -

File 32

Filter 15

For CEU Credit report 120

## - G -

Grid 15

Groups 104

## - H -

Home page 18

Hours Assigned report 120

## - I -

Import 111

Inbox 22

## - L -

Library 32

Logging in 12

Logging out 15

LSMS 5.3 features 9

## - M -

Menu bar 18

Messages 22

    Approve requests 28

## Messages 22

- Archive 27
- Compose 23
- Forward 26
- Reply 24
- Sent messages 22
- View 22

**- O -**

- Offline Training Detail report 120
- Offline Training Manifest report 120
- Organization Directory 92
- Organization unit 93
  - Administrator 97
  - Training administrator 97

**- P -**

- Password
  - Change password 13
  - Forgot password 12
  - Reset password 12
- People 92
- People Assignments report 120
- People at a Glance report 121
- People Summary report 121
- Permissions 107
- PS4 32

**- Q -**

- Question at a Glance report 121

**- R -**

- Recurrences 83

## Reports 114

- Export 115
- Released reports 119
- Run 114
- Save 118
- Schedule 116
- View last run 114
- Reports Directory 114, 119

## Requirements

- Minimum requirements 9
- System requirements 9
- Rich-text document 32, 41

## Roles

- System administrator 107
- Trainee 107
- Training administrator 107

**- S -**

- Search 15
- Security roles 107
- Settings
  - Culture setting 13
  - Language setting 13
  - Security answer 13
  - Security question 13
  - Time zone setting 13
  - User settings 13
- System Usage Summary report 121

**- T -**

- Tags 84
- Test Scores report 121
- Test Summary report 122
- Tests Completed Under Minimum Time report 121
- Third-party content 32
- Top Training Titles report 122

## Training

- Assessment 32, 39
- Course 57
- Curriculum 57
- Excuse 87
- External resources 32
- Lesson 57
- Mark complete 87
- Offline 32, 44, 46, 47
- Presentation 32
- Request excuse 20
- Review training 20
- Sessions 32
- Survey 32, 37
- Take training 19
- Test 32, 35
- Training set 57
- Training units 32, 49, 50, 53, 54, 56
- Website 32

Training Assignments report 122

Training at a Glance report 122

Training Data for Export report 122

Training Details report 122

Training Library 32

Training Status Details report 122

Training Usage Summary report 123

## - U -

Unassigned Trainees report 123

Usage Details report 123

User Account Information report 123

Users 97

