

# USER GUIDE

## Profiling Training to New Hires or Adding a 'Complete By' Date Administration User Guide

## How to Profile Training to New Hires or Add a 'Complete By' Date

On Systems 24-7, Companies are able to assign training to new hires only, making it easier for you to decide what training is mandatory for new hires based on their "creation" date.

In addition, companies are also able to assign due dates to specific courses within a training profile. For example, perhaps you want WHMIS completed by January 1st of each year. Due dates are reflected on the user's Training list.

**Step 1:** Under your **Admin** settings, select **Configuration Settings**.

**Step 2:** Select **Edit Company Training Profile**. If you do not have this setting, you do not have permission. Please speak with your corporate office or call your Systems 24-7 provider for further assistance.

### Edit Company Training Profile

Create or update your training profile by mapping courses to categories or various levels in the company structure.

**Step 3:** This page is broken out into two sections. The top section of the page is where you assign/profile training. The second section is where you can view how training is already assigned (and edit the profile if needed). To profile training, select how you wish to assign your training from the assignment options available. See full administration guide for profiling training for a description of the different assignment options. In this user guide, we will demonstrate profiling training by company level.

The screenshot shows the 'Edit Company Training Profile' form. The top section is titled 'Create your training profile by mapping courses to categories or various levels in the company structure.' It includes a 'Map Course to:' section with radio buttons for 'Company Level' (selected), 'Category', 'Company Level and Category', and 'Admin Level'. Below this are fields for 'Select level to map:' (a dropdown menu showing 'Department'), 'Select name(s):' (a text input with 'Choose Names...'), and 'Select course(s):' (a text input with 'Choose Courses...'). There are also checkboxes for 'Apply to new hire only:' and 'Complete By:'. The bottom section is titled 'Training Profiled' and includes a 'Display Profile By:' section with radio buttons for 'Course' (selected), 'Company Level', 'Category', and 'Admin Level'. Below this is a 'Select Courses:' dropdown menu showing 'All'. A 'View' button is located at the bottom right. Two orange callout boxes are present: one on the right side of the top section stating 'This is where you can assign/profile training from the options available.' and one on the right side of the bottom section stating 'This is where you can view how training is already profiled and make changes.'

**Step 4:** While **Company Level** is selected to map the course to, select the company level to map to, such as department.

This is a close-up screenshot of the 'Select level to map:' dropdown menu. The 'Company Level' radio button is selected. The dropdown menu is open, showing a list of options: 'Department', 'Company', 'Country', 'Province', 'Site', and 'Department'. The 'Department' option at the bottom is highlighted in blue.

**Step 5:** Once the level is selected, select the name to map to.

Map Course to:  Company Level  Category  Com

Select level to map: Department

Select name(s):

Select course(s):

- Corporate Office : Administration
- Corporate Office : Ownership
- Main Office : Service
- Main Office : Technology

**Training Profiled**

**Step 6:** Select the name of the course(s) you wish to profile.

Select level to map: Department

Select name(s): Main Office : Service x

Select course(s):

- Battery Storage and Disposal
- Building A Big Mary Sandwich
- Coaching
- Communication
- Construction Safety Basics

**Training Profiled**

Display Profile By: egory

Select Courses:

**Step 7:** If you wish to assign this training to a new hire only, select “apply to new hire” only, which will ensure this training is only applied to new hires. Then select the hire date (also known as the user’s creation date) which will apply the profile only to users hired on the selected date.

Apply to new hire only:

New Hire Date: April 1, 2020

Complete By: Apr 2021

**Training Profiled**

Display Profile By:

Select Courses:

**Step 8:** If you wish to apply a ‘complete by’ date (also known as due date) to this training profile, check off the option. You will have a couple of options to assign this due date.

Complete By:

Fixed Date

**Fixed Date:** Applies a fixed date to complete the training. For example, by May 31, 2020.

**Yearly Fixed Date:** Applies a yearly fixed date to complete the training, convenient for those courses with an expiry date. For example, by January 31 of each year.

**Within a Time Frame:** Applies a timeframe to be completed. For example, within 30 days of the course being assigned or within the user’s date of hire.

Apply to new hire only:

New Hire Date:

Complete By:

▾

▾

▾  ▾

**Step 9:** Make the required selections and select save to save the training profile.