Table of Contents

1 Introduction

Training Manager **Web Edition** is a web-based Training Records Software for managing your company's Employee Training Records.

Training Manager provides a central online repository for storing and retrieving your training records, allowing you to quickly look up training transcripts or gaps in required training. Training Manager is designed to work with very little configuration required. This web edition allows you to set up your training records system online and access it from anywhere with a web browser and internet connection.

How It Works

To get started, Courses and Personnel are added to the system. Then you can add completed training and required training.

Training Manager will use the required training and completed training list to automatically calculate training status reports.

Features and Benefits at a Glance

Features:

- ✓ Track employee training records.
- ✓ Report on training status and easily identify training gaps and training due to expire soon.
- ✓ Manage requirements company-wide, by group, job role, or individually.
- ✓ Track attendance, cancellations, no shows, etc.
- ✓ Record training credits, training hours, and assessment scores.
- ✓ Print transcripts, training plans, compliance reports, and more.
- ✓ Track training costs by Group, Individual, Course, Category, or Supervisor.
- ✓ Automatically track all changes in an Audit Trail.

Benefits

- ✓ Be ready for a training audit at any time with Summary and Detail Status reports.
- ✓ Eliminate time wasted searching through file cabinets and loose papers for paper sign-in sheets.
- ✓ Keep track of who has been trained and when re-training is due.
- ✓ Maintain a central repository for training documents, and records.
- ✓ Eliminate wasted time manually creating training reports.

Training Manager Subscription

- A Training Manager subscription may be purchased online with a credit card. To purchase a subscription:
  1) Login to your Trial account.
  2) Click the button in the toolbar for the main "Options" page.
  3) Click the "Begin Paid Subscription" button, and then choose your subscription plan.
- Your Training Manager subscription will be kept up-to-date with all new releases automatically at no extra charge.
- Your subscription includes all required web hosting and file storage.
- Support by email is available free for both trial and licensed users (see additional support information in the next section).

*Prices are listed on the main pricing page in USD. Prices in EUR and other currencies are based on the exchange rate at the time of purchase, and will be displayed on the checkout page.

Training Manager Support

All Training Manager support is available free by email. Additional paid support by telephone is not available at this time. This support model allows our customers around the globe to reach an appropriate expert for their specific technical, sales, or customer service question without wading through multiple levels of support and call backs. Support tickets may be submitted through the website at www.kaizensoftware.com

See Also

- Registration and Login
- User Interface
- Populate the data

1.1 Registration and Login

Registration

You can register a new account for your company at the following link:

https://www.kaizen-training-manager.com/account/register

You will need to fill in the following fields:

Field Name	Description
Company Name (for url):	This value will determine the url which you will use to access your account. For example, if you enter the company name, "acme", then the url to your account will be: https://acme.kaizen-training-manager.com.
Email:	This is your email address where the confirmation link will be sent.
Agreement (check box):	You must agree to the Terms and Conditions to register.

After submitting your registration information, check your email for a link to complete your registration.

The link will direct you to a page where you can provide your name and password to complete the registration. Submit the information and wait a few seconds as your account is set up.

Login

You can login to your account at [your custom url]/account/login, where [your custom url] is the url you set up during registration. To login, enter your email address and password. If you do not know your password, click the "Forgot Password?" link on the login form, and then continue to send a "Password Reset" link to your email address. The link will expire after 24 hours.

Note: you can also go to our main website at: www.kaizensoftware.com, and click the Login link in the upper right part of the page. Then click the link for Training Manager. If your company login page has been previously saved on that computer, it will take you directly there. Otherwise it will take you to a login page with an additional field where you can enter your company name to login.

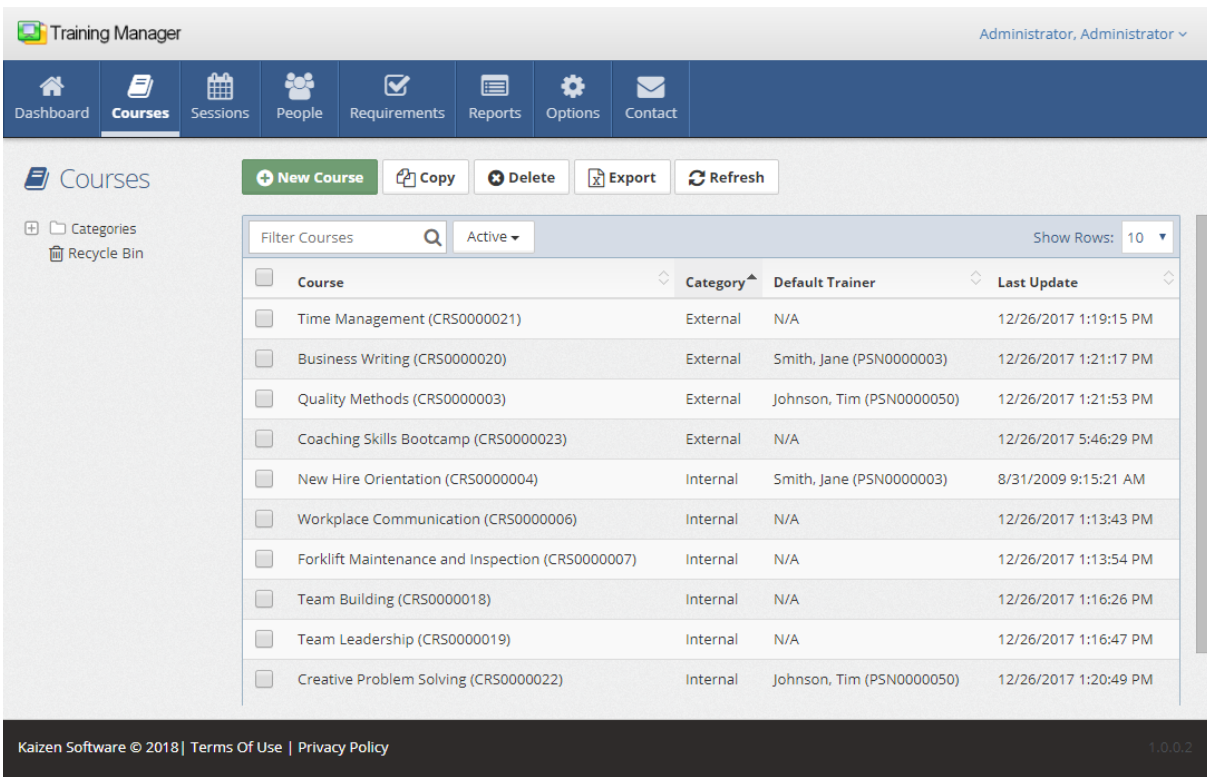
1.2 User Interface

This section describes the common user interface elements used throughout the web application.

The Layout

The Training Manager window is divided into 4 areas:

1. Main Navigation Buttons along the top (Dashboard, Courses, Sessions, People, Requirements, Reports, Options, Contact)
2. The Toolbar Buttons below the main navigation.
3. The List or Detail View in the main/central area of the screen.
4. Navigation Folders on the left.



The Main Navigation Buttons

The **Main Navigation Buttons** allow you to easily switch between the main pages in the web application: Dashboard, Courses, Sessions, People, Requirements, Reports, Options, Contact. The button for the current page is highlighted ("Courses" in the screenshot below).

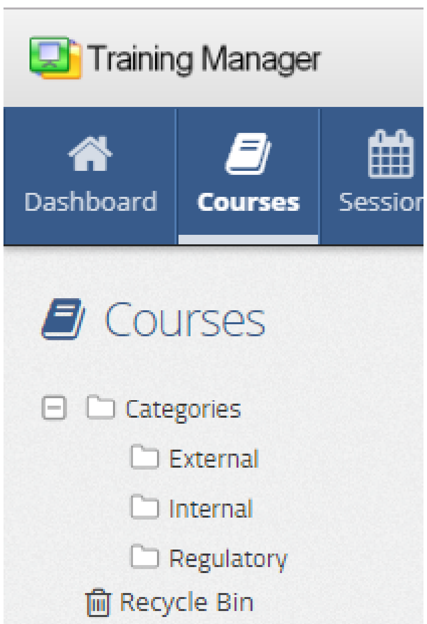
The List/Detail Views

The main part of the list view pages will display a list of records. When you click on an item in the list, it will display the detail view for that item.

Search a list by typing your search criteria into the Filter box.

The Navigation Folders

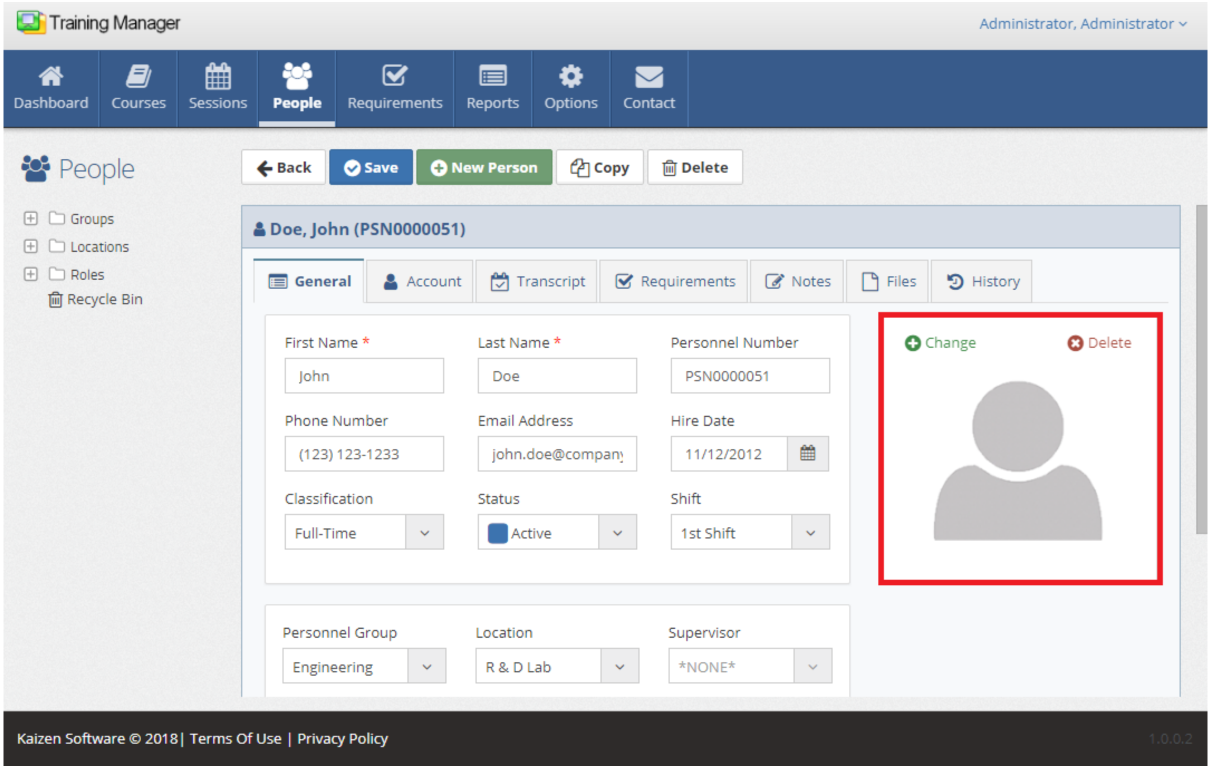
The list view pages contain navigation folders on the left side of the screen. These folders allow you to organize the data into groups and quickly filter the list by clicking on a folder. You may create new folders by right-clicking on the navigation folder area and selecting the "New" option from the menu. Or, rename an existing folder by right-clicking on the folder and selecting the "Rename" menu option.



Picture Fields

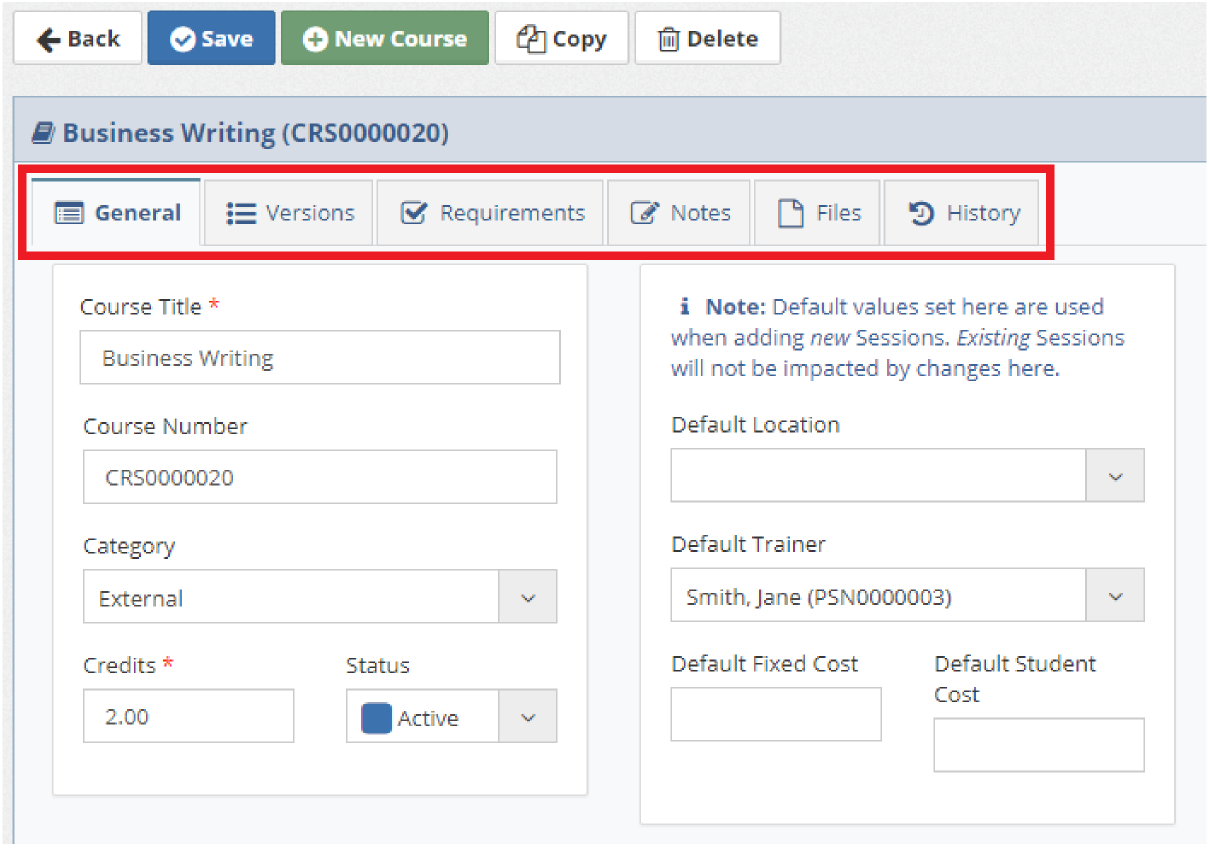
Picture fields allow you to add a picture to a record. This field is available on the Personnel Detail page.

- Click the **Add Picture** button to add a new picture to the record.
- Click the **Delete Picture** button to delete the currently displayed picture.



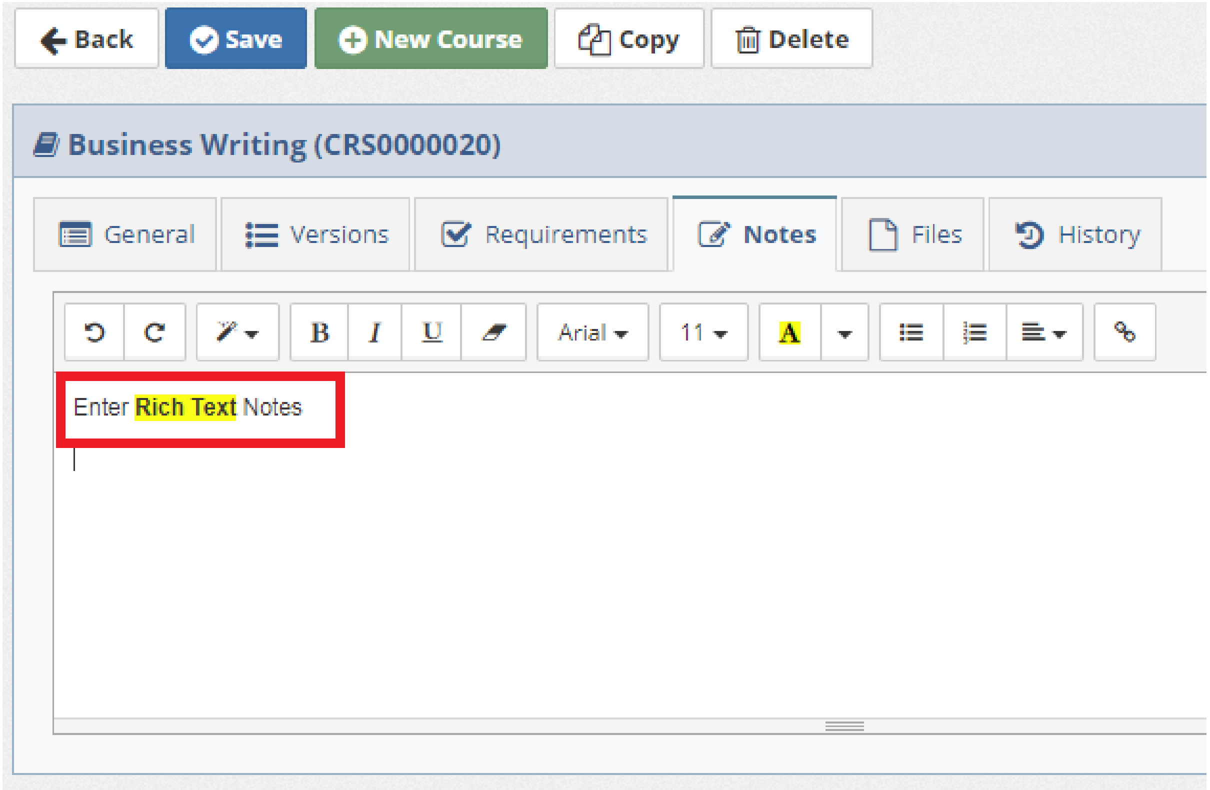
Tabs

The Detail pages have tabs which contain groups of fields for data entry.



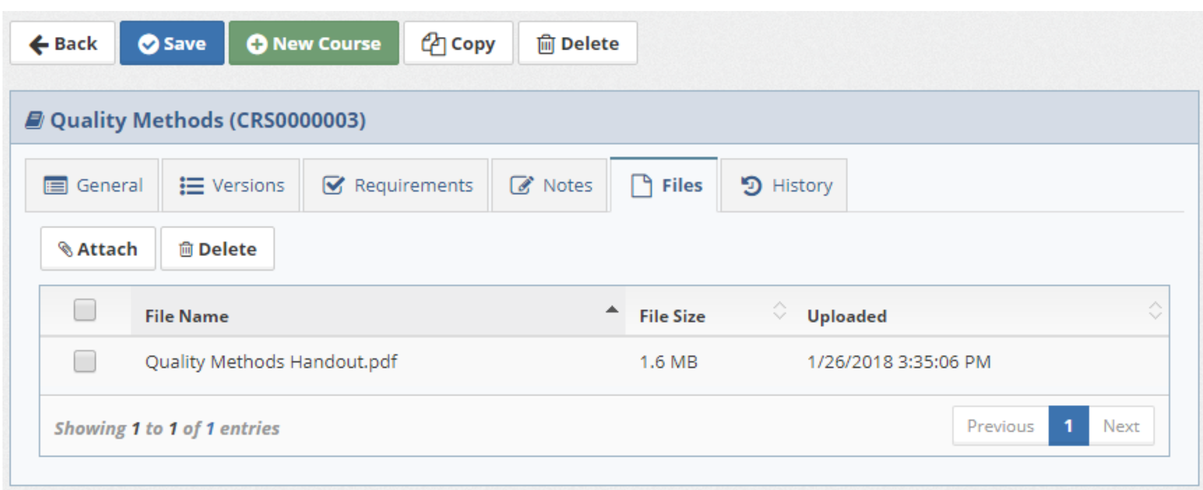
Notes Tabs

Enter rich text notes on the Notes tabs, including text formatting, numbered lists, and bullet lists.



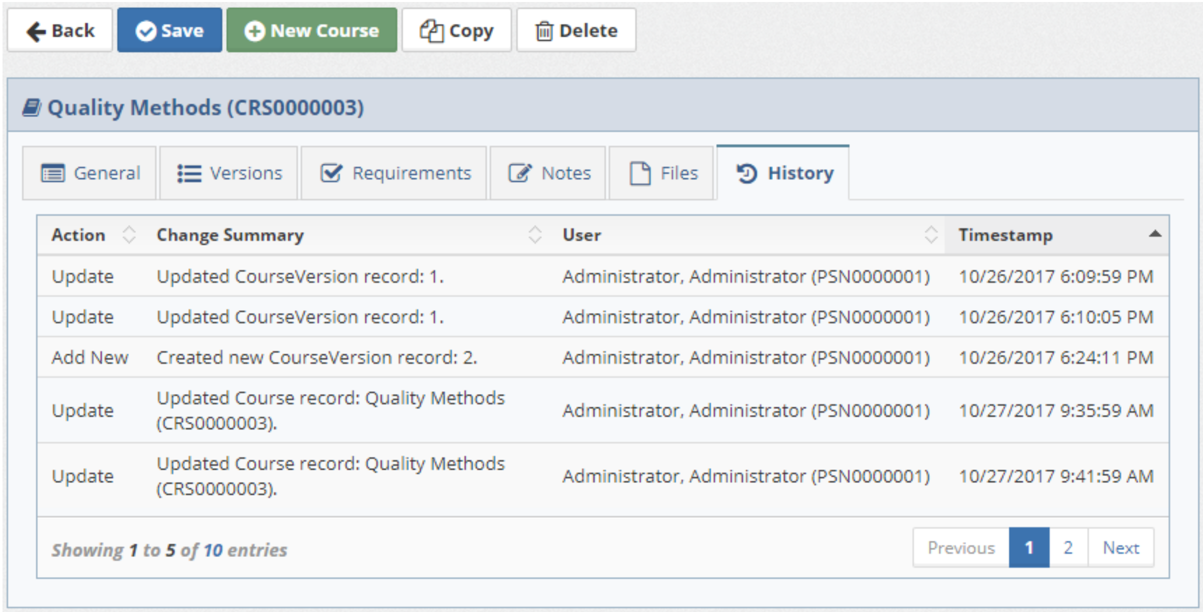
Files Tabs

Upload any type of file on the Files tabs.



History Tabs

The History tabs on the detail pages show a timestamped list of updates to the record. Click on any row in the list for more details about the changes.



1.3 Populate the data

Data may be entered in any order as needed; however, it can be helpful when you start out to enter your data in the order described below for a smooth flow, minimizing the back-and-forth jumping from one area of the database to another. Below is a summary of the steps to populate your database.

Step 1: Selection Fields

Open the **Options** page by clicking the Options button in the main navigation, and then click the **Selection Fields** link located in the left side navigation area.

Next, choose a selection field to update by clicking on Job Role, Personnel Classification, or Shift. You can add, edit, and delete values for each selection field as needed.

If you don't have all of the data now, that's ok. You can enter it in later, but entering it now will allow you to easily select it when adding Course and Personnel records in the following steps.

Step 2: Categories, Groups, and Locations

Locate the **navigation folders** on the left side of the main Course List page. Right-click on a folder and then choose from the menu option to add New, Rename, or Delete a folder. Use this process to organize the Categories in the Course List, and then repeat the same process for the Groups and Locations on the main Personnel List page.

You can edit the position within the folder hierarchy by dragging and dropping a folder from one level in the hierarchy to another.

Step 3: Courses

Next, enter your master course list on the Courses list page. Begin a new record by clicking the "New

Course" button. Fill in the information and then click the **Save** button to add the new course to the list.

Step 4: People

Next, enter your master list of Personnel on the People tab. Begin a new record by clicking the "New Person" button. Fill in the information and then click the **Save** button to add the new person to the list.

Step 5: Sessions

Add historical and new training on the Sessions tab.

Step 6: Requirements

Set up your organization's training and re-training requirements on the Requirements page. Although it's easy to get started adding individual training requirements, it's a better practice to assign the required training to "Groups" or "Job Roles" whenever possible. Then, Training Manager can automatically assign training when a person changes Groups or Job Roles within the organization.

Step 7: Report Header and Footer

To change the default header and footer on reports, go to the main **Options** page by clicking the button in the Main Navigation along the top, and then click the **Report Options** link located in the left side navigation area. You can then enter the values for the Header and Footer as needed, and then Save the changes.

2 How To (Steps)

- Manage User Submitted Training
- Manage Courses
- Manage People
- Manage Sessions
- Manage Requirements
- Add Completed Training
- Add Company Name and Logo on Report
- Set Up Annual Training Requirements
- Add an External Trainer
- Export a Report
- Set or Change a Password
- Add a New User

2.1 User Submitted Training

The "User Submitted Training" feature is a convenient way for users to submit their completed training records for approval online.

This feature streamlines the data entry process for "Read and Understand," SOP Training, and Self-Study Training.

Here's how it works:

1. The user enters a training record on their "My Dashboard" page and submits it for approval.

2. The training record is added to the database with the status "Pending Approval." It will not fulfill any training requirements until approved.
3. Administrators can view the list of training records that are "Pending Approval" on the "Company Dashboard." They can approve or cancel these records in bulk or one-by-one as needed.
4. Once the training record is approved or canceled by an Administrator, its status is updated to "Completed" or "Cancelled" accordingly.

In summary, the "User Submitted Training" feature makes the training approval process easier and more efficient for both users and administrators.

See more information about each area at the links below.

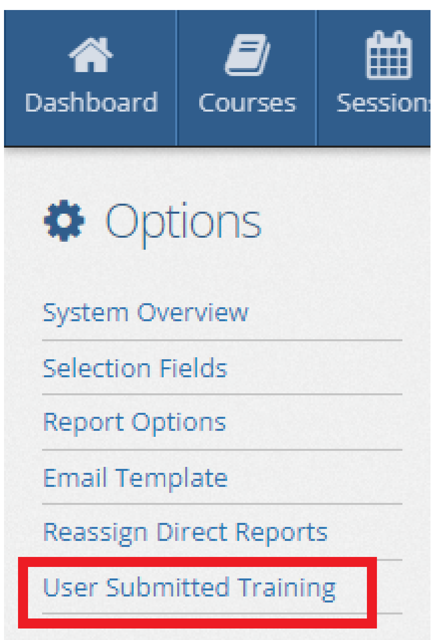
- Allow Users to Submit Training
- Submit Training for Approval
- Approve Training

2.1.1 Allow Users to Submit Training

Options: User Submitted Training

To access the User Submitted Training options, follow these steps:

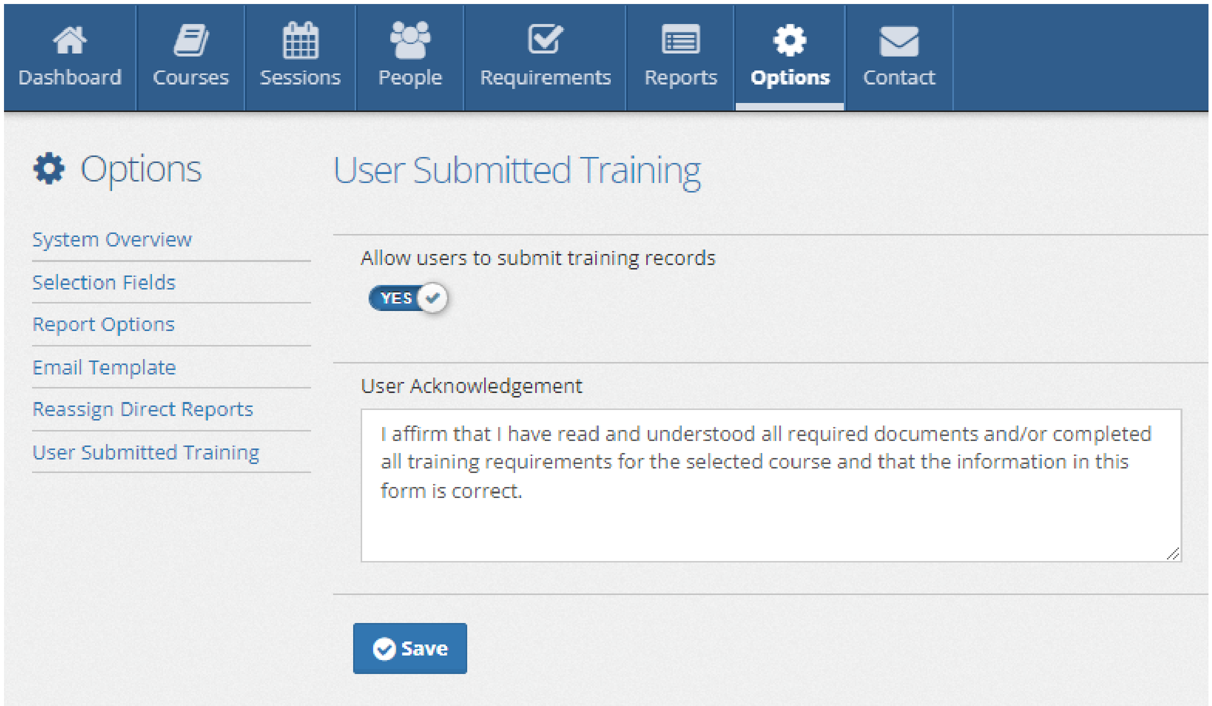
1. Click the "Options" button in the main toolbar at the top of the page.
2. In the left side navigation pane, click the "User Submitted Training" link.



In the User Submitted Training options, you can:

1. Enable the feature to allow users to submit training for approval by checking the "Yes" box. This will add a "New Training Record" button to the "My Dashboard" page.
2. Review and update the Acknowledgement Text, which the user must agree to before submitting their training for approval.

3. Don't forget to click the "Save" button to save changes to the User Submitted Training options.



Next: Submit Training for Approval

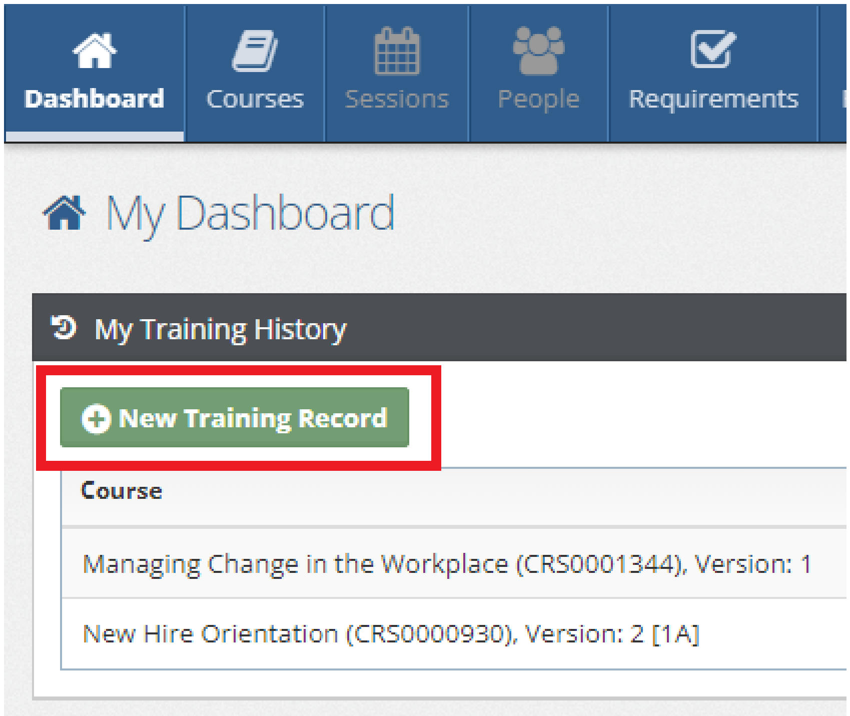
2.1.2 Submit Training for Approval

My Dashboard: Submit Training for Approval

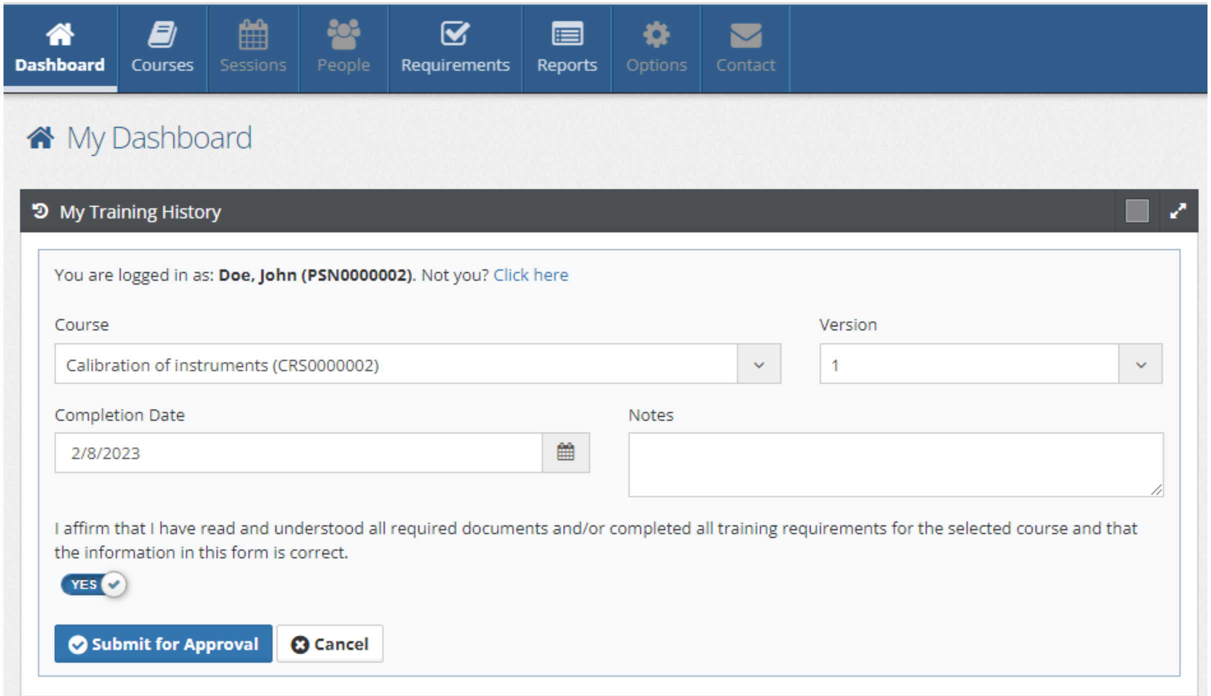
This feature allows users to submit their completed training records for approval online.

Here's how it works:

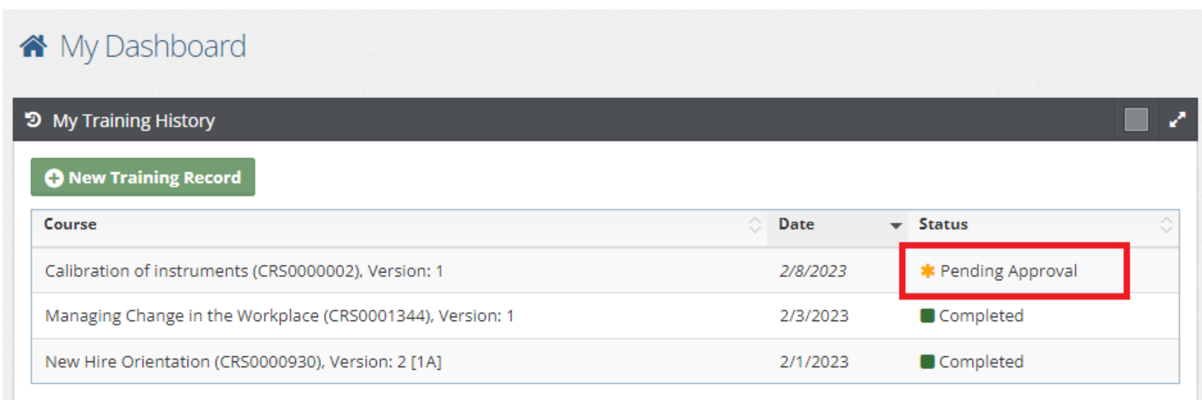
1. If the User Submitted Training feature is enabled, the **New Training Record** button will appear above the Training History list on the **My Dashboard** page.



2. After clicking the **New Training Record** button, a form will appear for the user to fill in. The form will include the following fields:
   - Course and Version
   - Completion Date
   - Notes
3. The user must check the acknowledgement box before submitting the training for approval.



Once the training is submitted, it will appear in the user's Training History list with the status "Pending Approval."



By using the "My Dashboard: Submit Training for Approval" feature, users can easily and efficiently submit their completed training records for approval.

Next: Approve Training

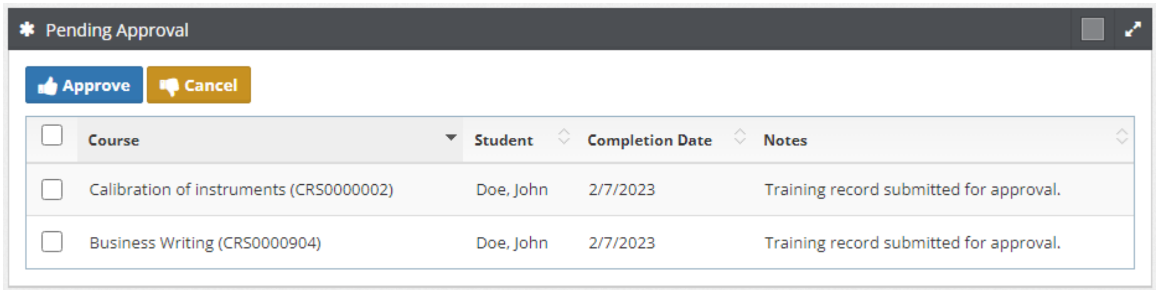
2.1.3 Approve Training

Company Dashboard: Pending Approval list

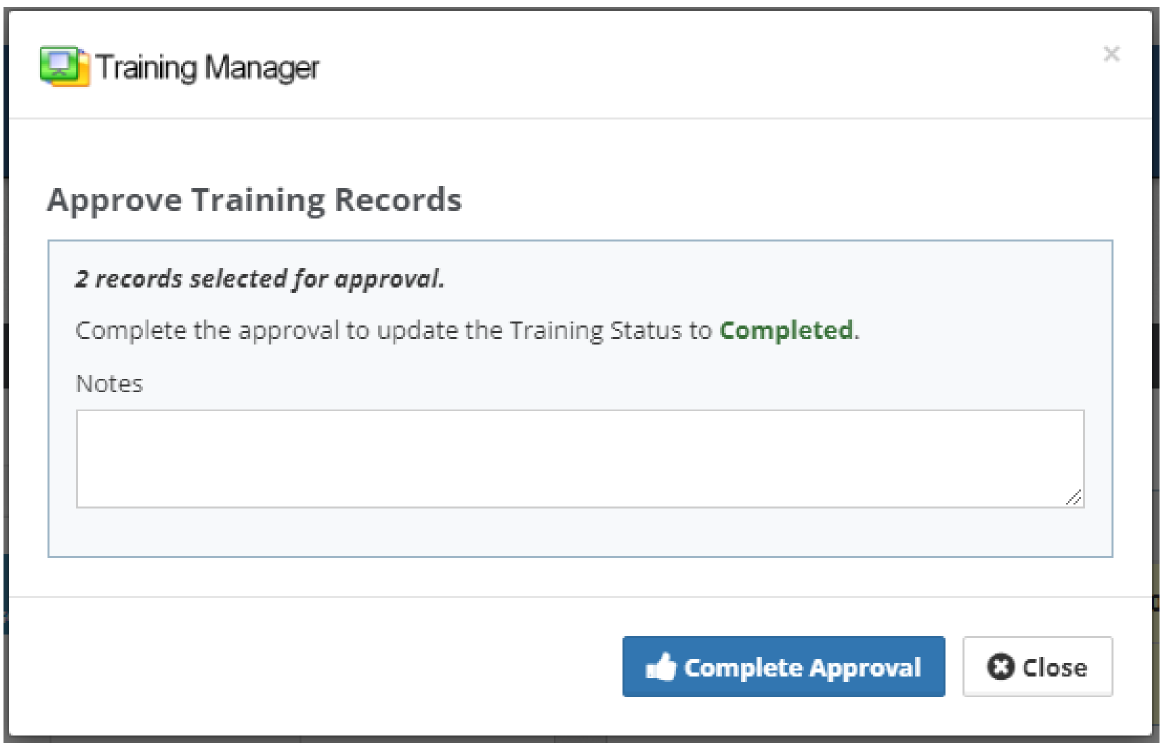
The "Company Dashboard: Pending Approval List" is a tool that enables administrators to review and approve or cancel training records that have been submitted by users.

Here's how it works:

1. If the User Submitted Training feature is enabled, Administrators can view a list of training records with the status "Pending Approval" on the Company Dashboard.



2. Administrators can select one or multiple items in the list and then click the "Approve" or "Cancel" button.



3. The system will update the status of the selected training records to "Completed" or "Cancelled" accordingly.

This provides a convenient and efficient way for administrators to review and manage the training records submitted by users.

2.2 Manage Courses

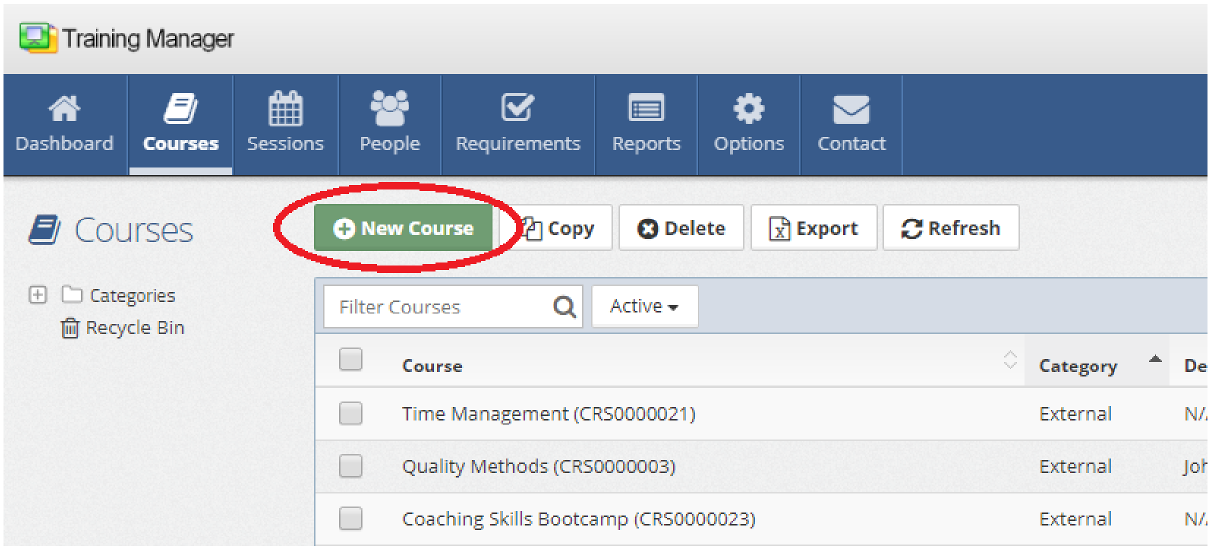
Select a topic below:

- Add New Courses
- Edit Courses

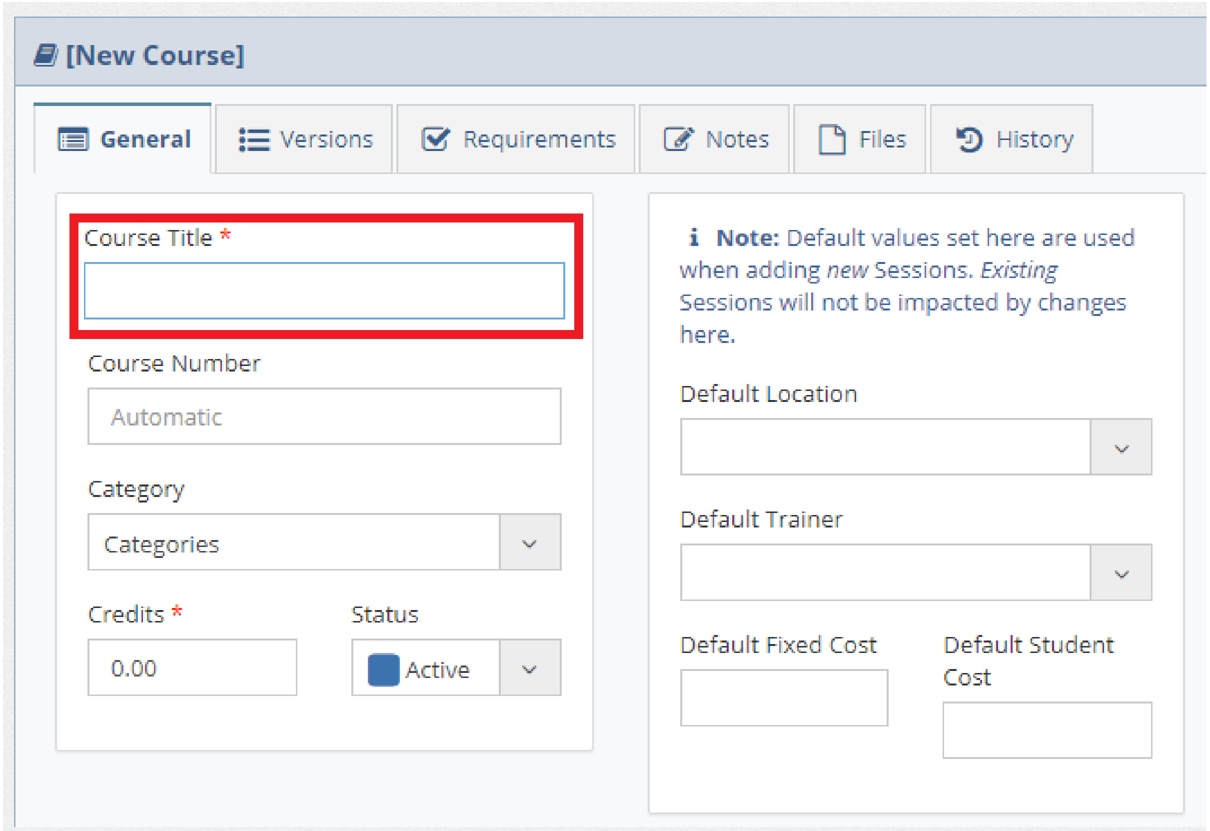
- [Delete Courses](#)
- [Restore Courses](#)

2.2.1 Add New Courses

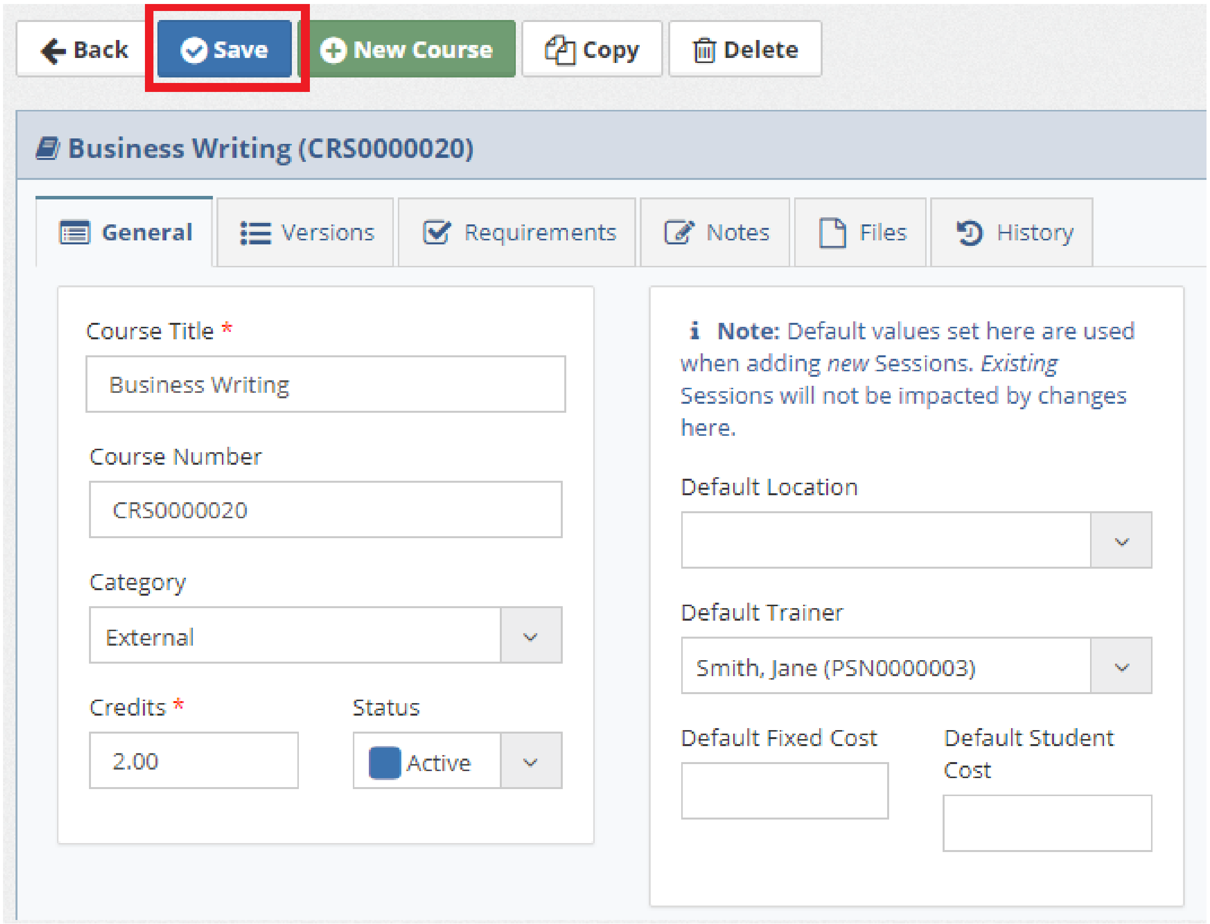
1. Click the **New Course** button located on either the Course List page or an existing Course Detail page.



2. Fill in the Course Title field on the new Course page. You may leave the "Course Number" field empty to have a new course number automatically created for you. Alternatively, you can enter a value manually by typing the value into the field.



3. Click the **Save** button to save the course record after filling in any other fields as necessary.

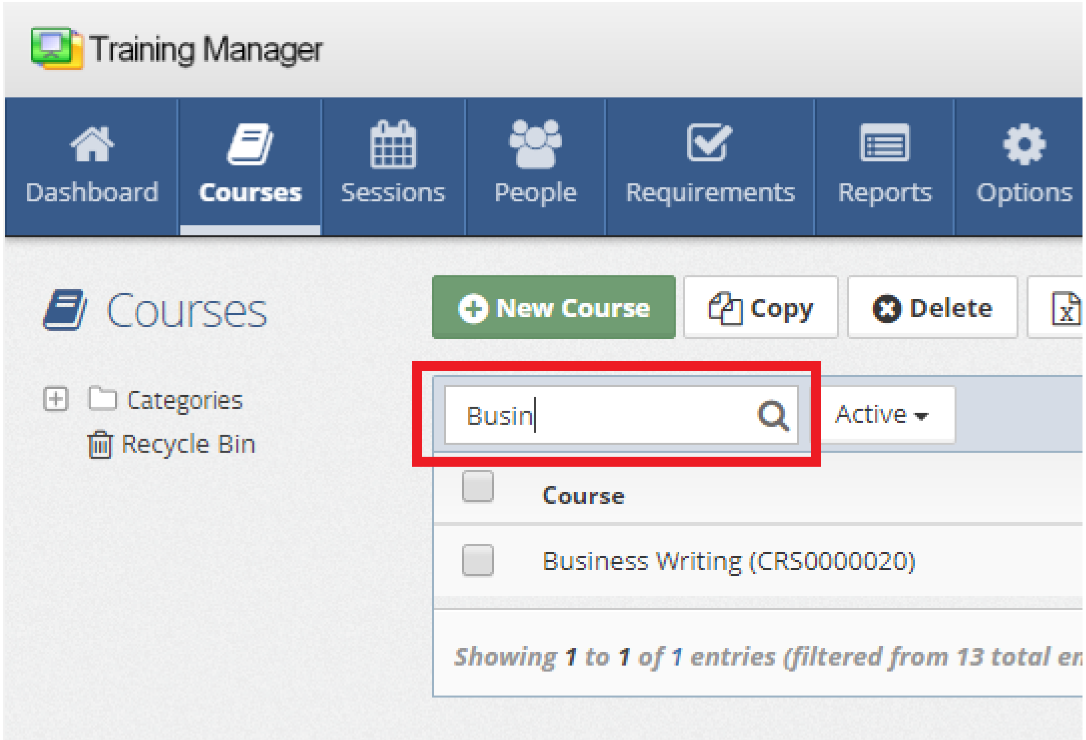


See Also

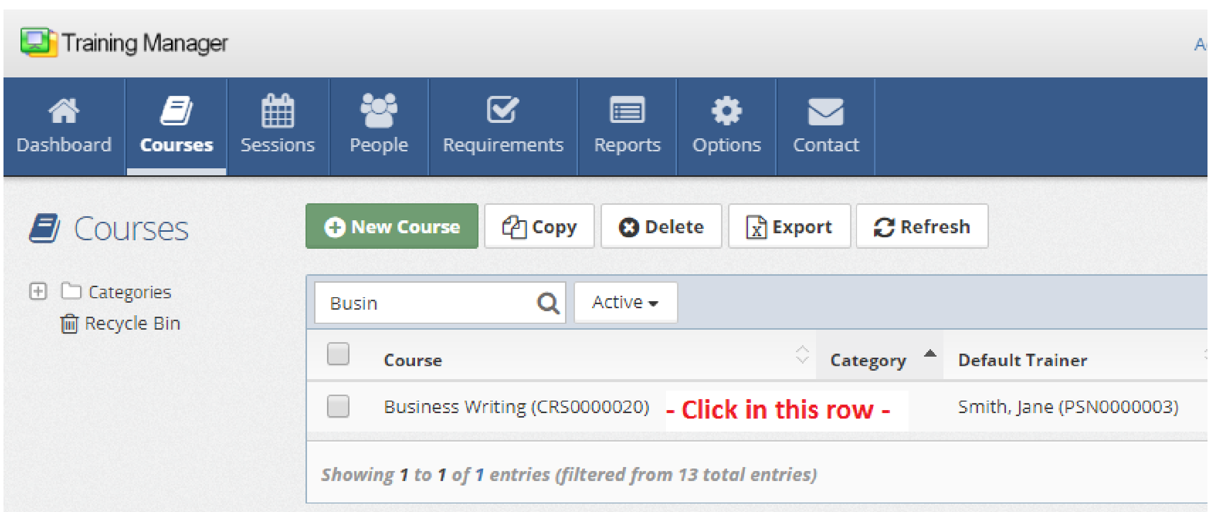
[Course Details]

2.2.2 Edit Courses

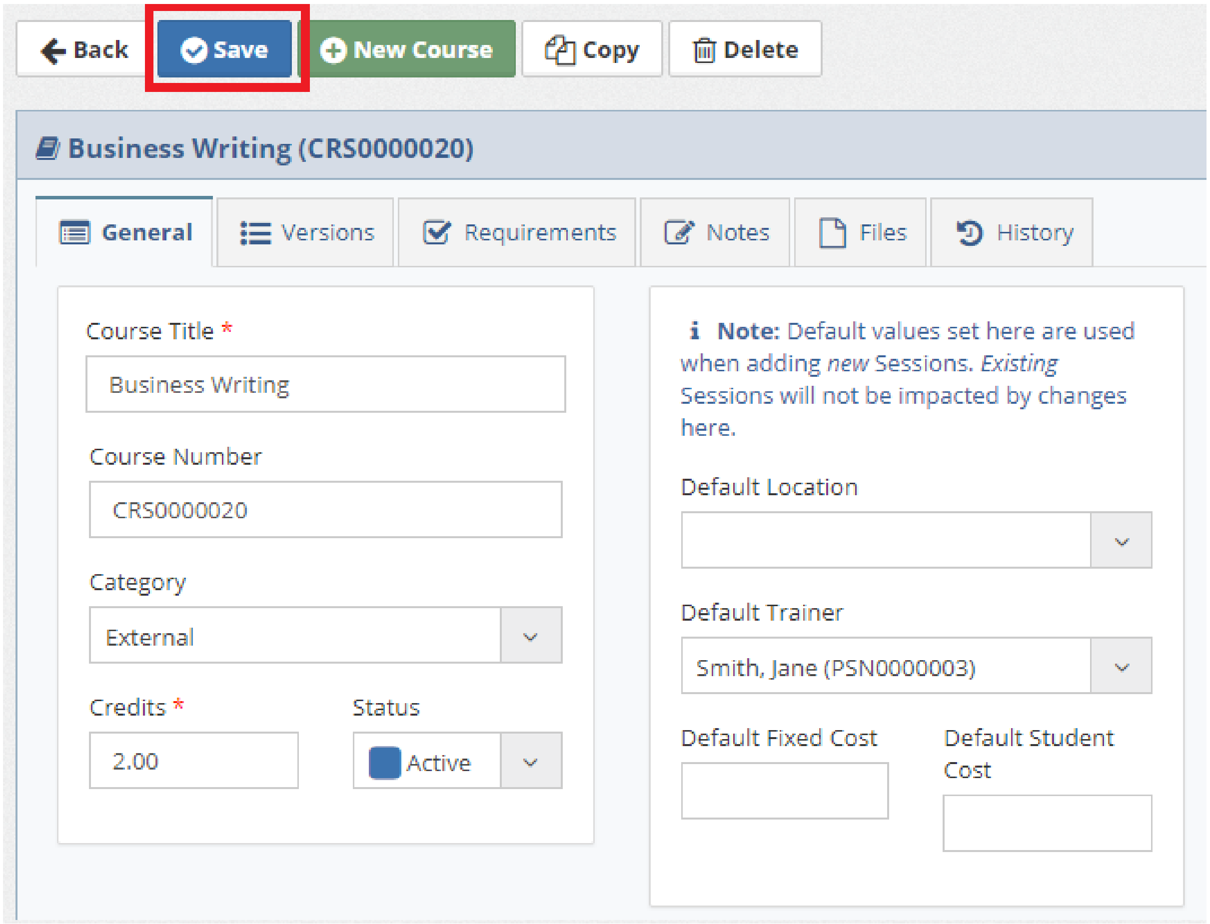
1. Locate the Course by placing your cursor in the **Filter Courses** box on the Course List page, and then type a few characters of the Course Title or the Course Number.



2. Click on the row containing the Course record to open the Course Detail page.



3. Type or select a new value in the fields as needed, and then click the **Save** button.



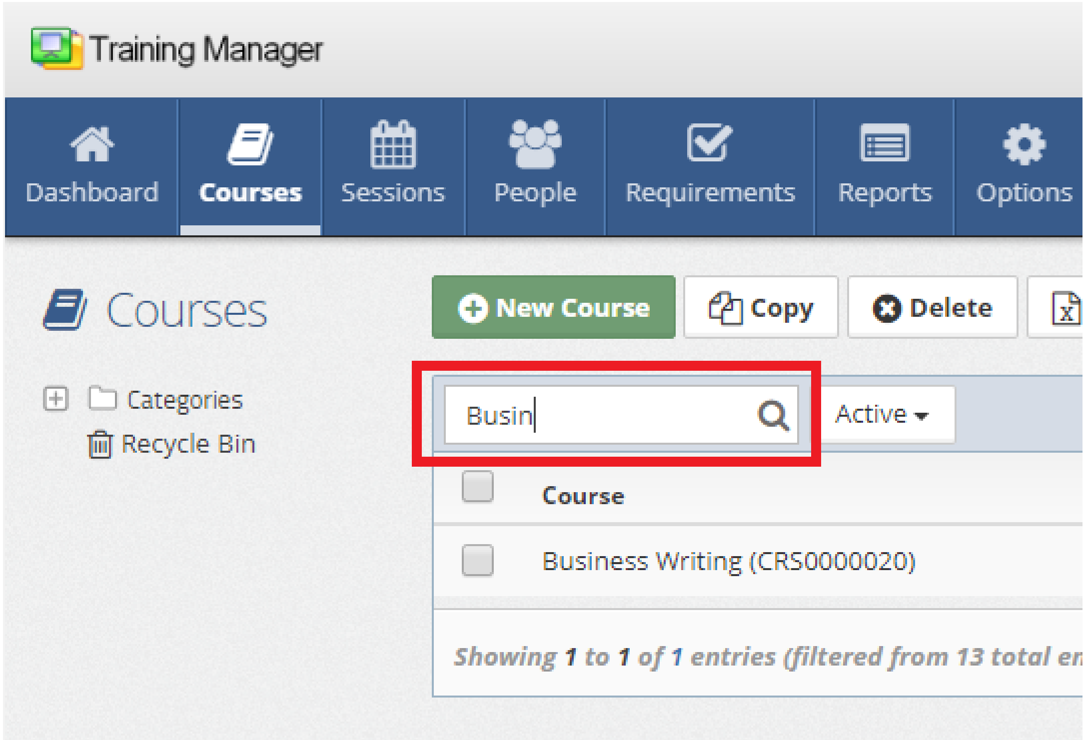
*If the course cannot be found ensure that you are searching the entire database by selecting the top-level "Categories" on the left, and "All" /"Active"/"Inactive" as needed from the filter selection field (next to the search box).

See Also

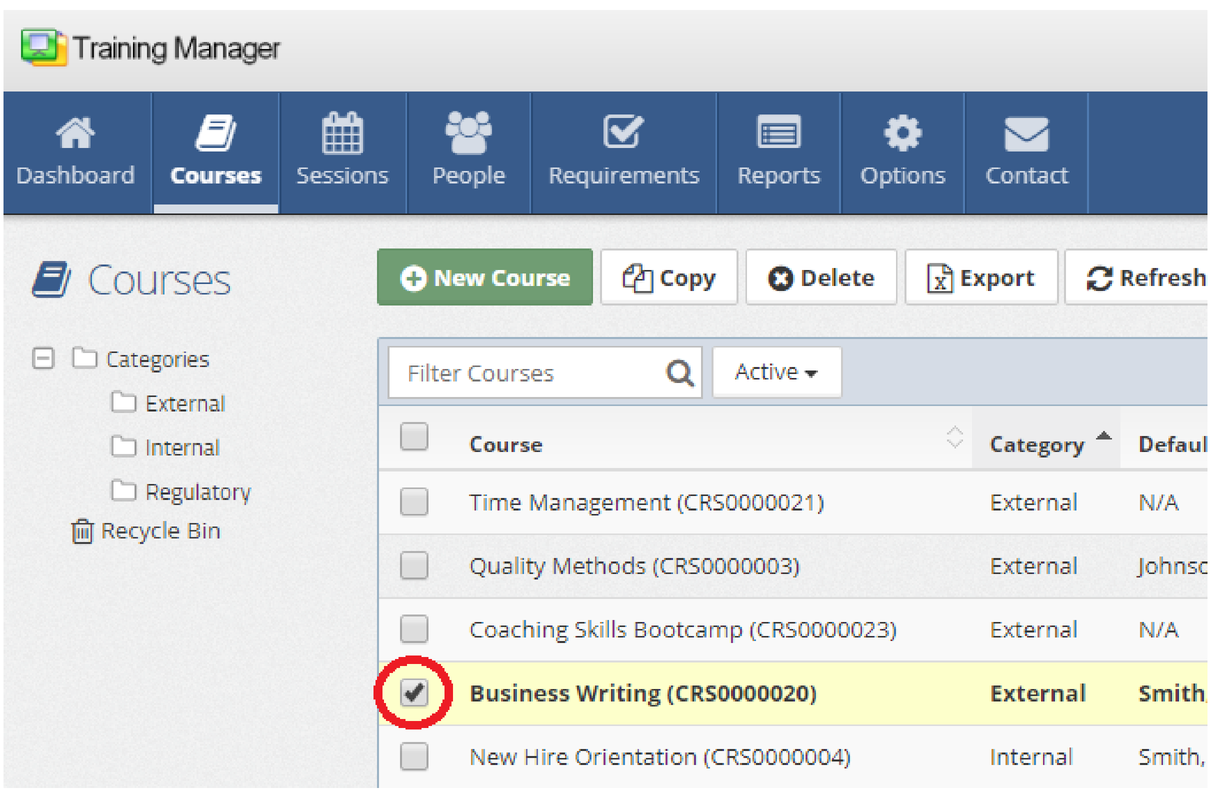
Course Details

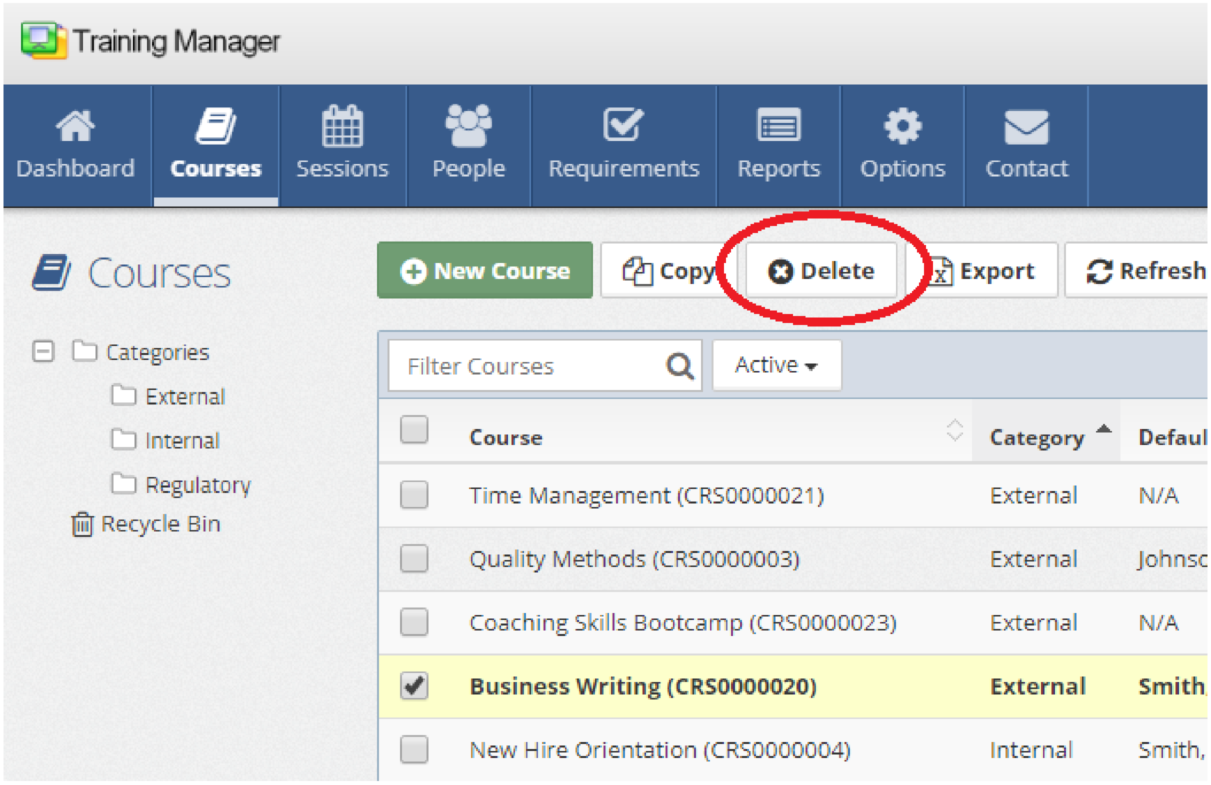
2.2.3 Delete Courses

1. Locate the Course to delete by placing your cursor in the "Filter Courses" box on the Course List page, and then type a few characters of the Course Title or Course Number



2. Place a check in the box next to the Course which you wish to delete, and then click the "Delete" button in the Course List toolbar, or open the Course Detail page, and then click the "Delete" button.





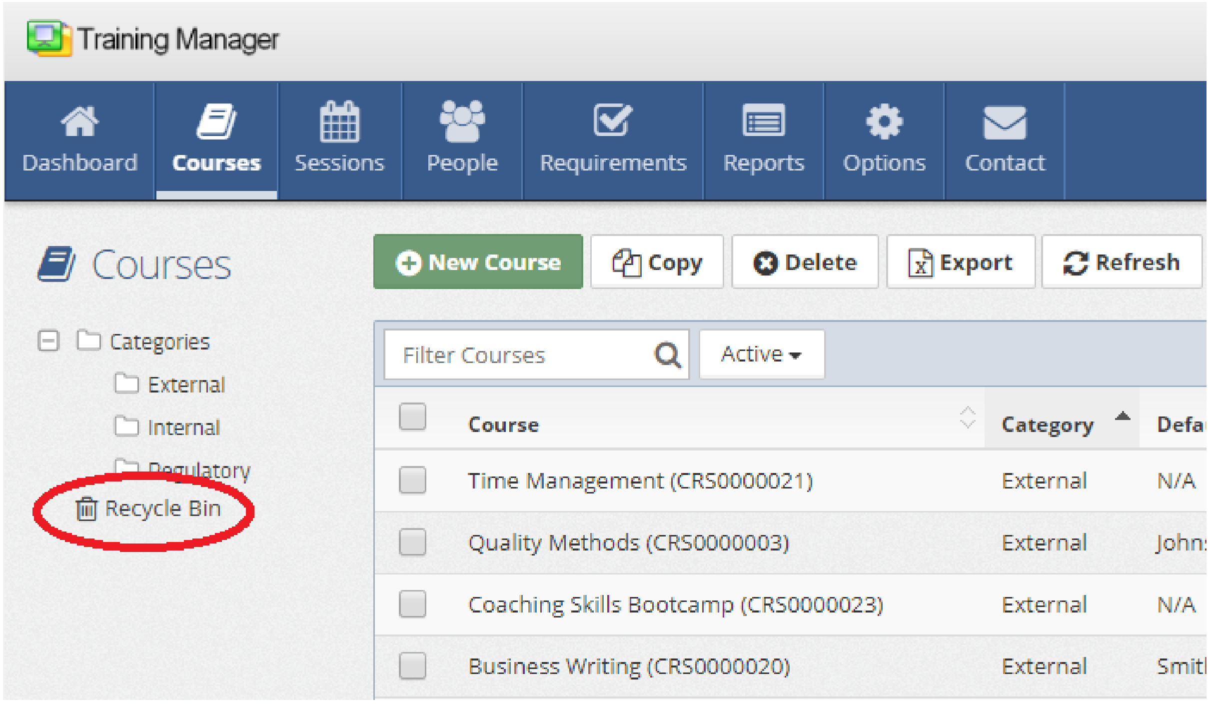
*If the course cannot be found ensure that you are searching the entire database by selecting the top-level "Categories" on the left, and "All" /"Active"/"Inactive" as needed from the filter selection field (next to the search box).

See Also

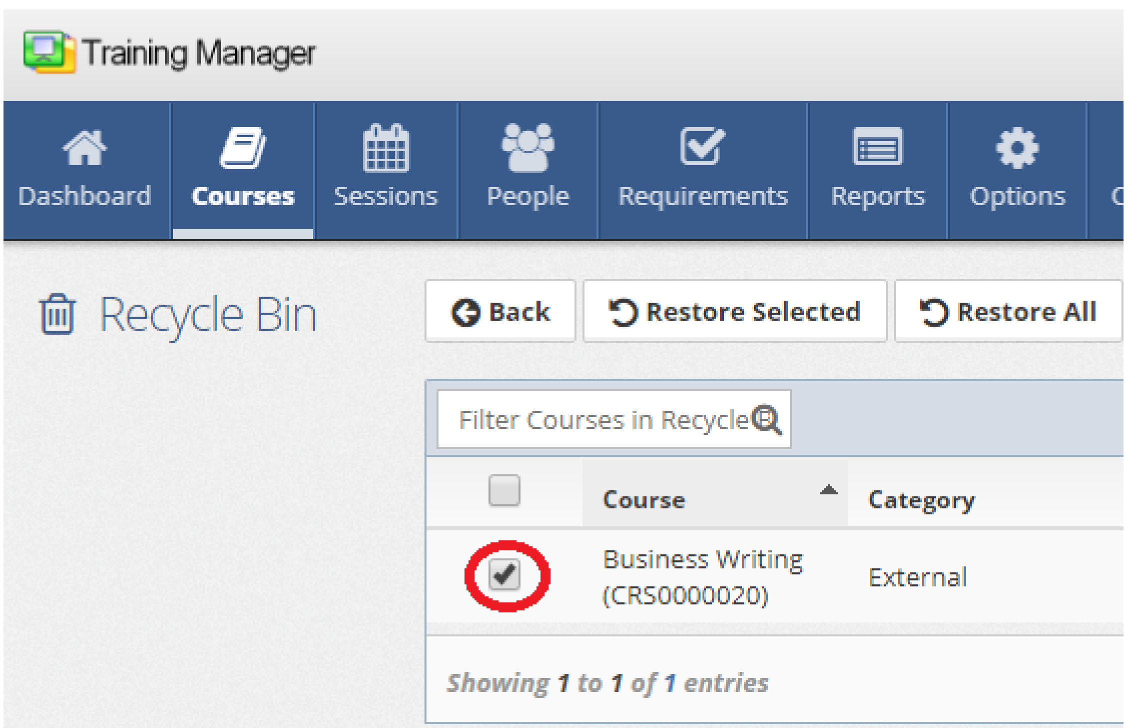
Course Details

2.2.4 Restore Courses

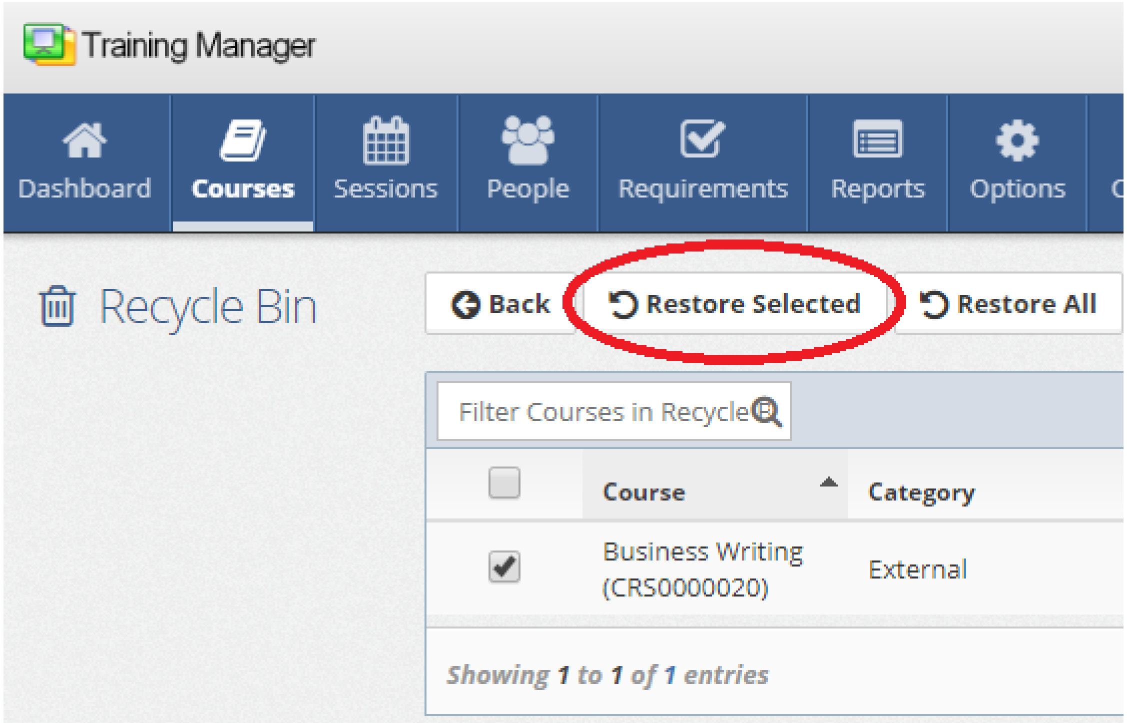
1. Click the Recycle Bin link located below the list of folders on the main Course List page.



2. Locate the Course to restore in the Recycle Bin, and **check the box** next to it.



3. Click the **Restore Selected** button to restore the selected Course record.



See Also

Course Details

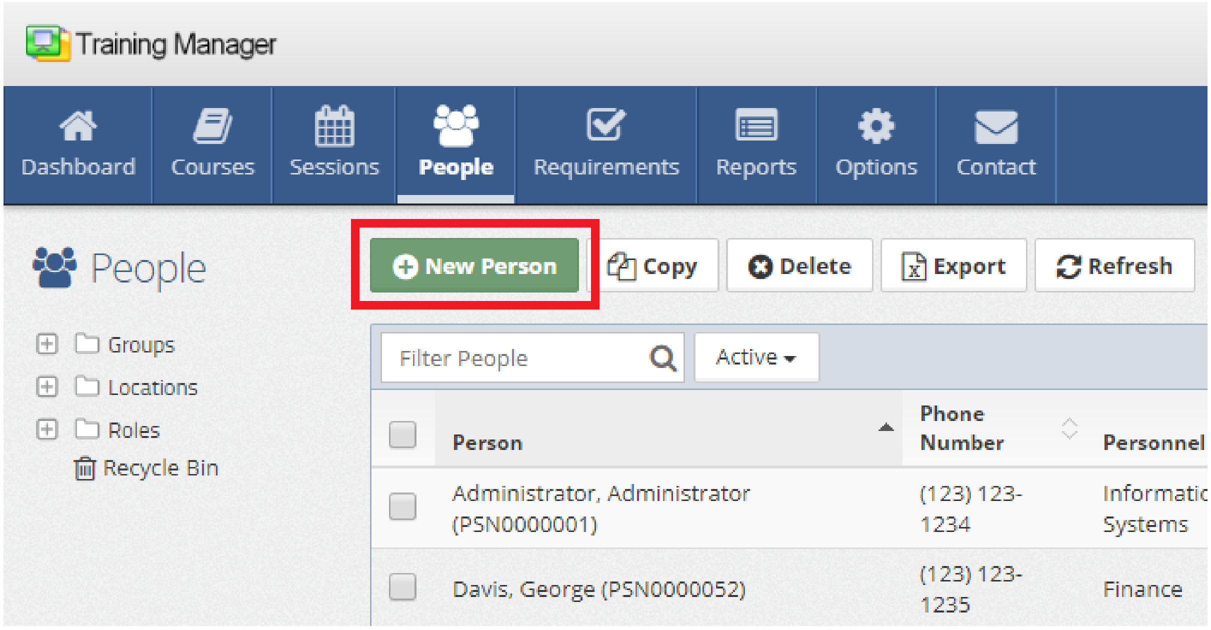
2.3 Manage People

Select a topic below:

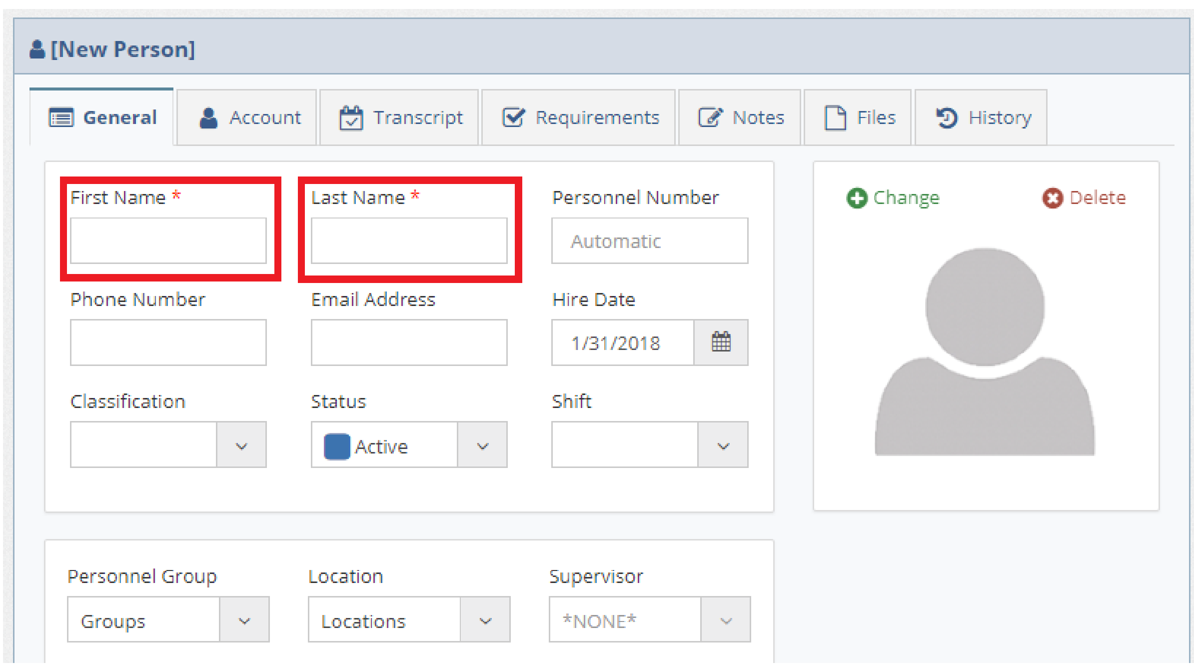
- Add New Personnel
- Edit Personnel
- Delete Personnel
- Restore Personnel

2.3.1 Add New People

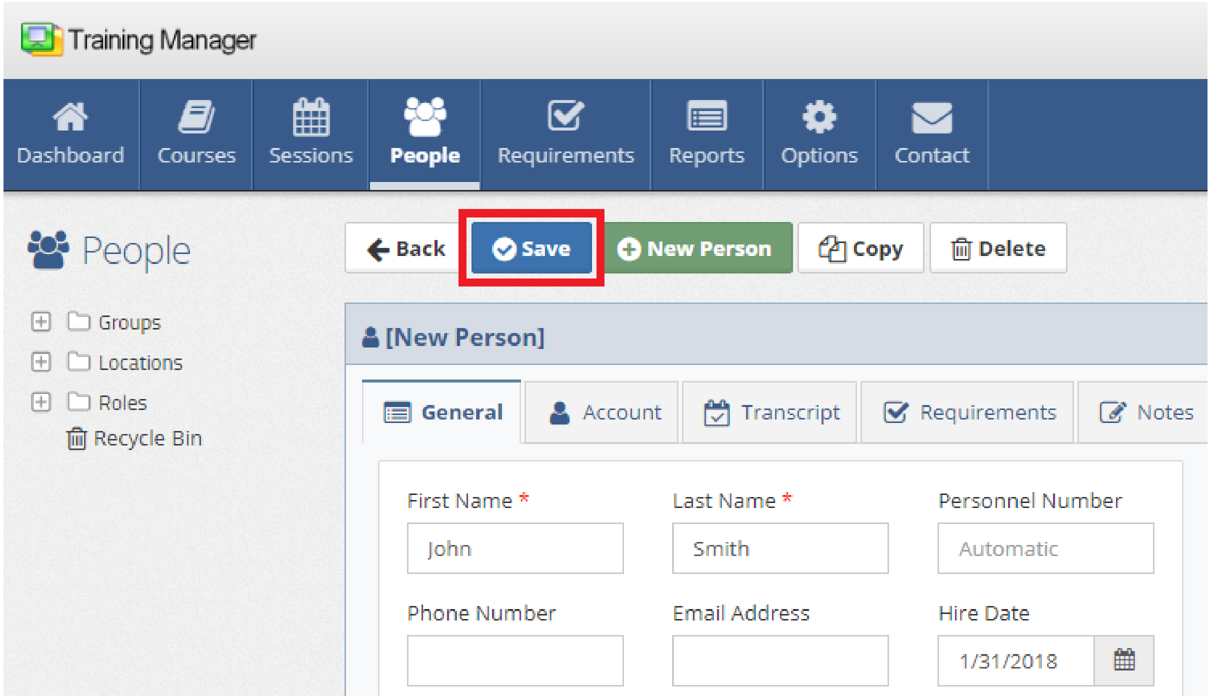
1. Click the **New Person** button located on either the People List page or an existing Personnel Detail page.



2. Fill in the required **First Name** and **Last Name** fields. You may leave the "Personnel Number (barcode)" field empty to have a new Personnel Number automatically created for you. Alternatively, you can enter a value manually by typing the value into the field.



3. Click the **Save** button to save the Personnel record after filling in any other fields as necessary.

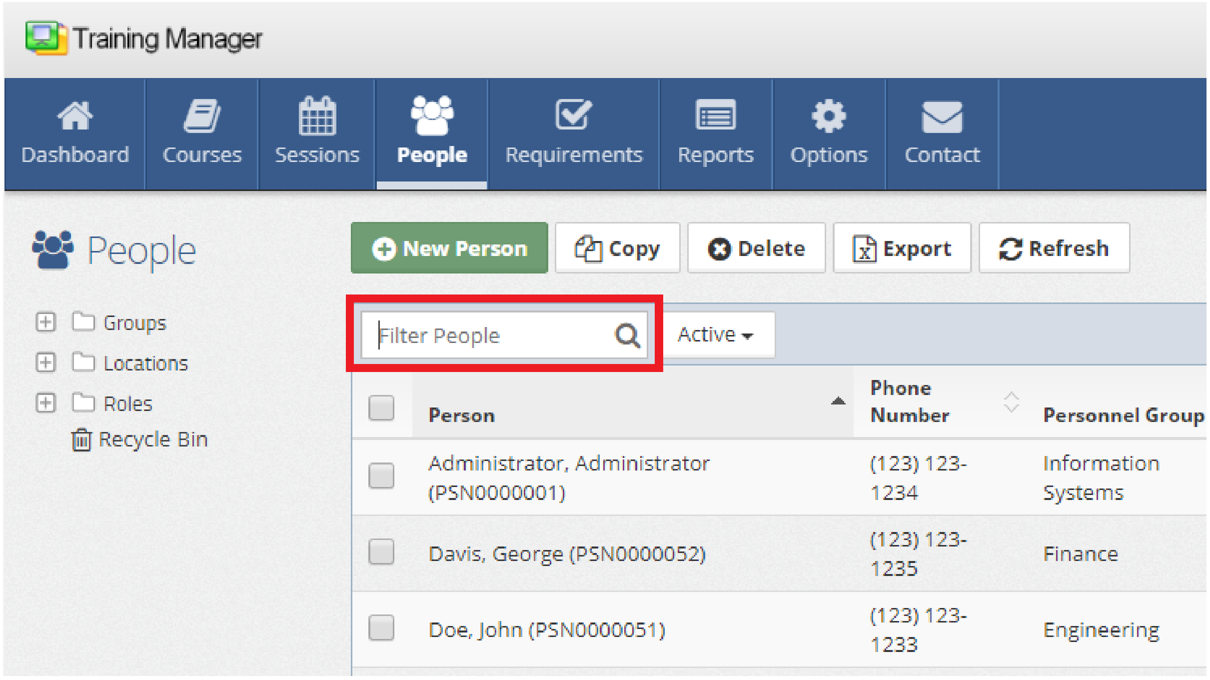


See Also

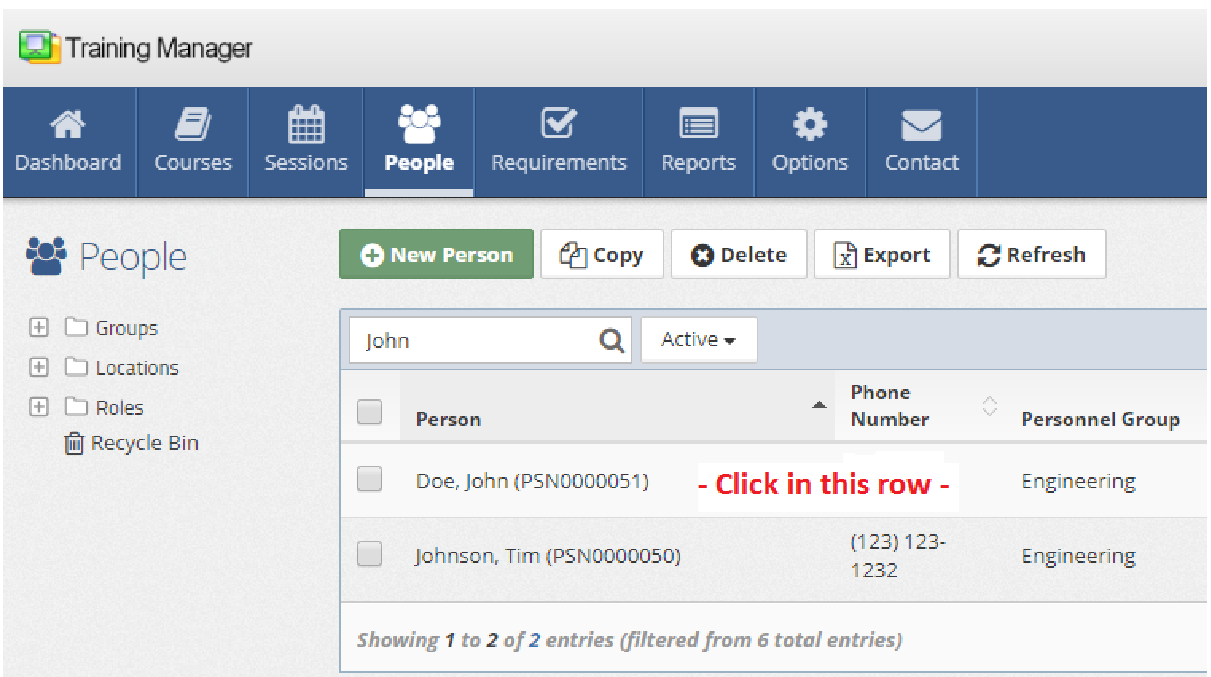
Personnel Details

2.3.2 Edit People

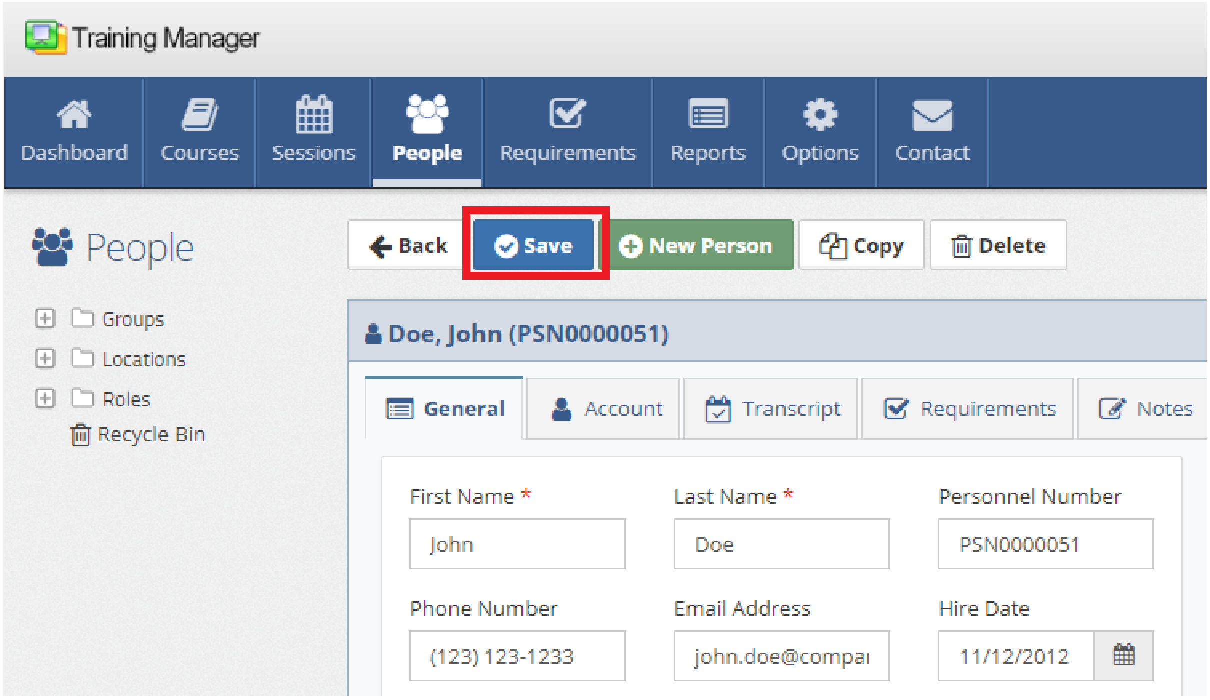
1. Locate the Personnel record by placing your cursor in the **Filter People** box on the People List page, and then scan the Personnel barcode or type a few characters of the Personnel Name or Number.



2. Click on the row containing the Personnel record to open the Personnel Detail page.



3. Type or select a new value in the fields as needed, and then click the **Save** button.



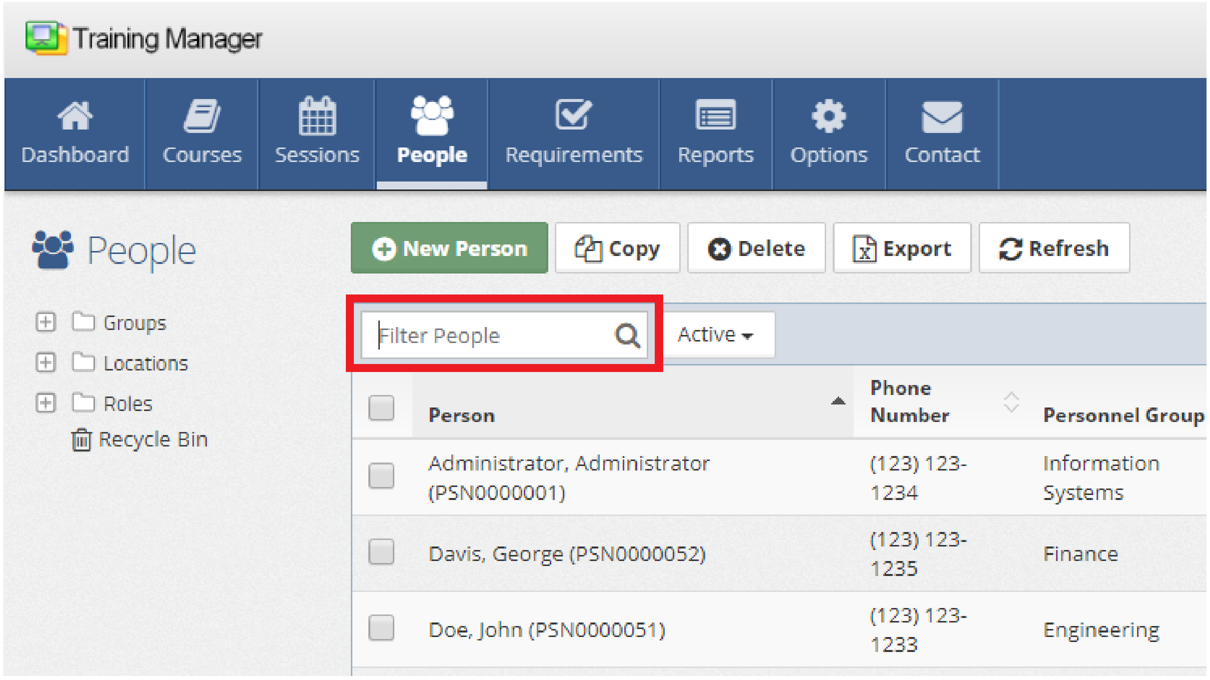
*If the Personnel record cannot be found ensure that you are searching the entire database by selecting the top-level folder for "Groups" , "Locations", and "Roles" folders on the left, and "All" /"Active"/"Inactive" as needed from the filter selection field (next to the search box).

See Also

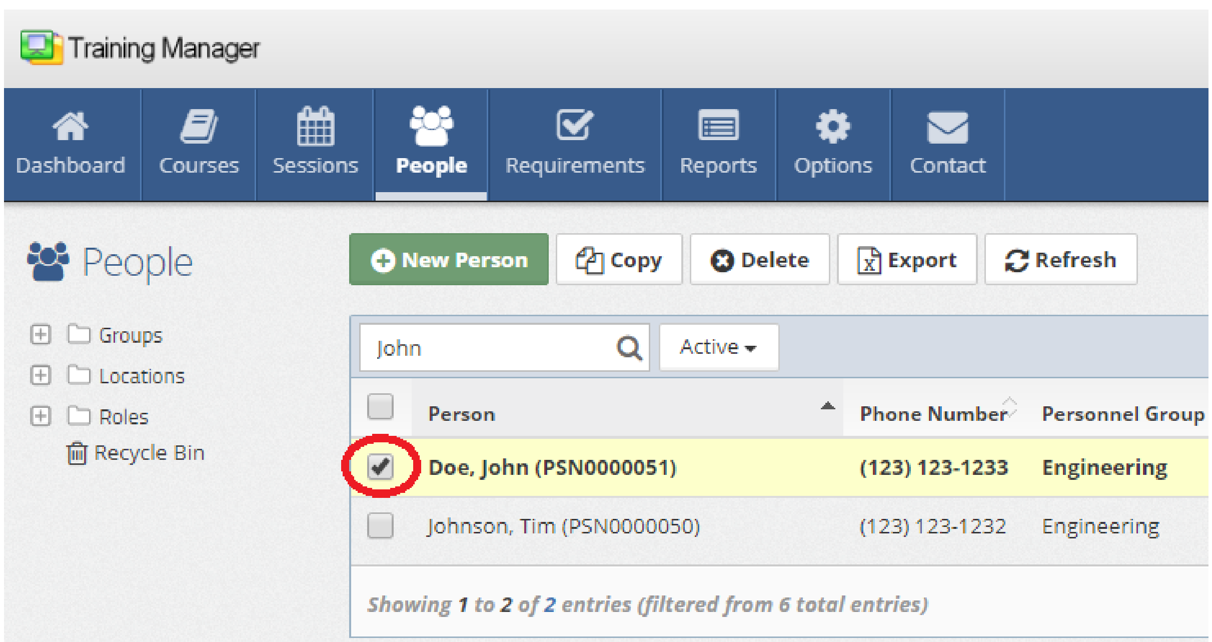
Personnel Details

2.3.3 Delete People

1. Locate the Personnel record to delete by placing your cursor in the **Filter People** box on the Personnel List page, and then scan the Personnel barcode or type a few characters of the personnel name or number.



2. Place a **check in the box** next to the Personnel which you wish to delete, and then click the **Delete** button in the Personnel List toolbar, or open the Personnel Detail page, and then click the Delete button.



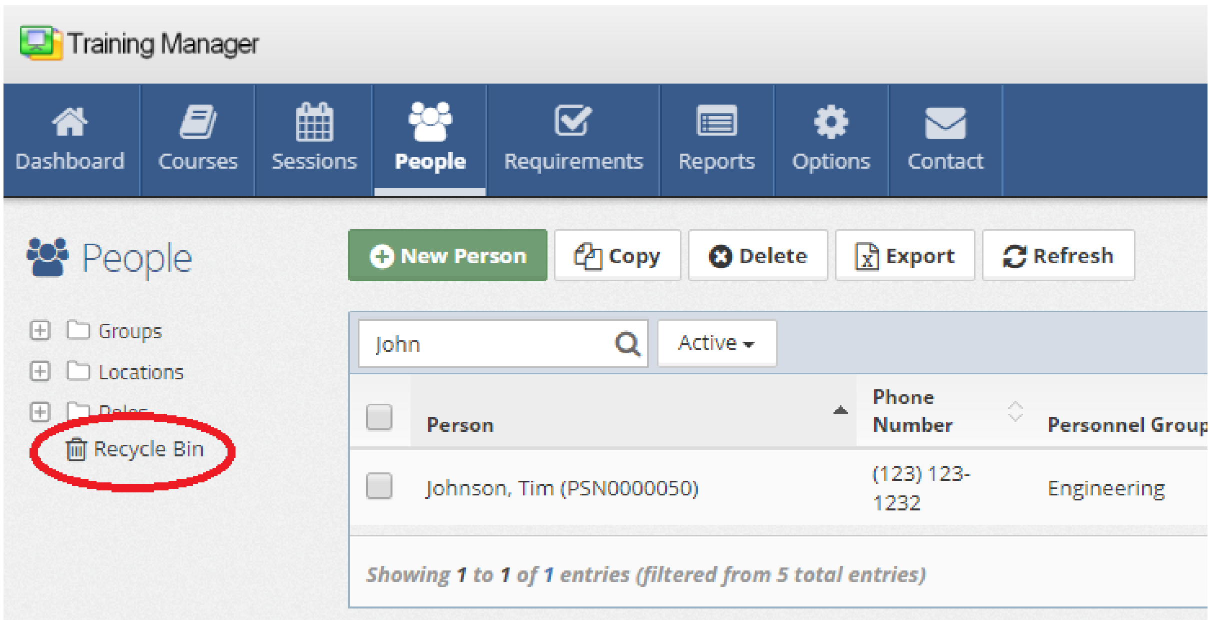
*If the Personnel record cannot be found ensure that you are searching the entire database by selecting the top-level folder for "Groups" , "Locations", and "Roles" folders on the left, and "All" /"Active"/"Inactive" as needed from the filter selection field (next to the search box).

See Also

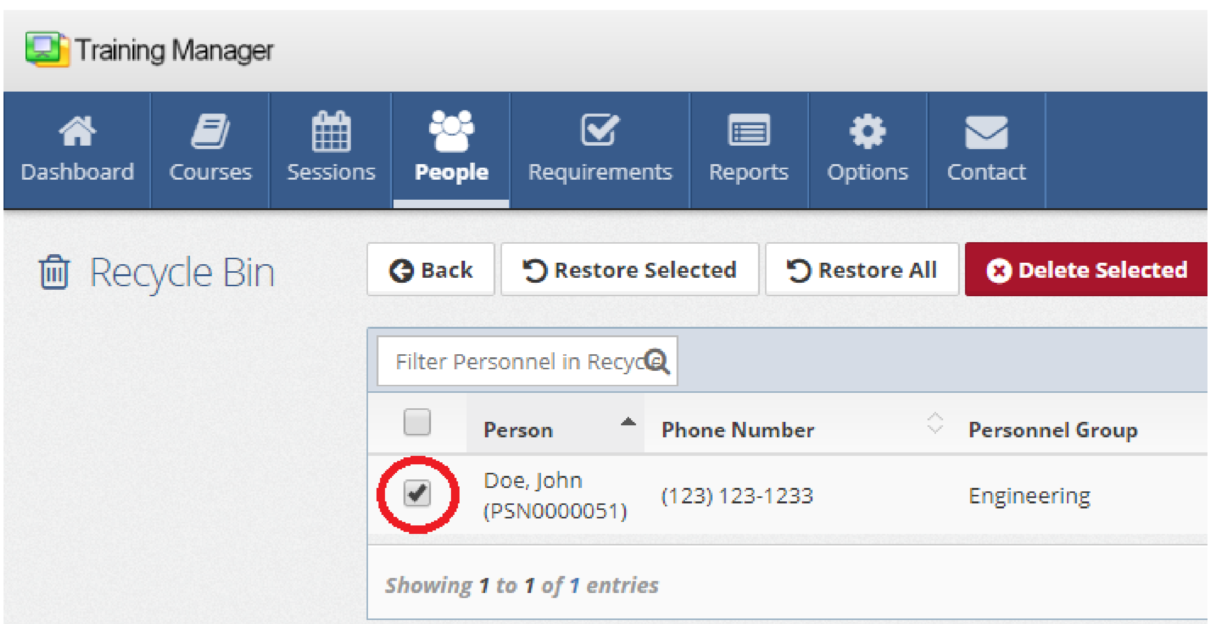
[Personnel Details]

2.3.4 Restore People

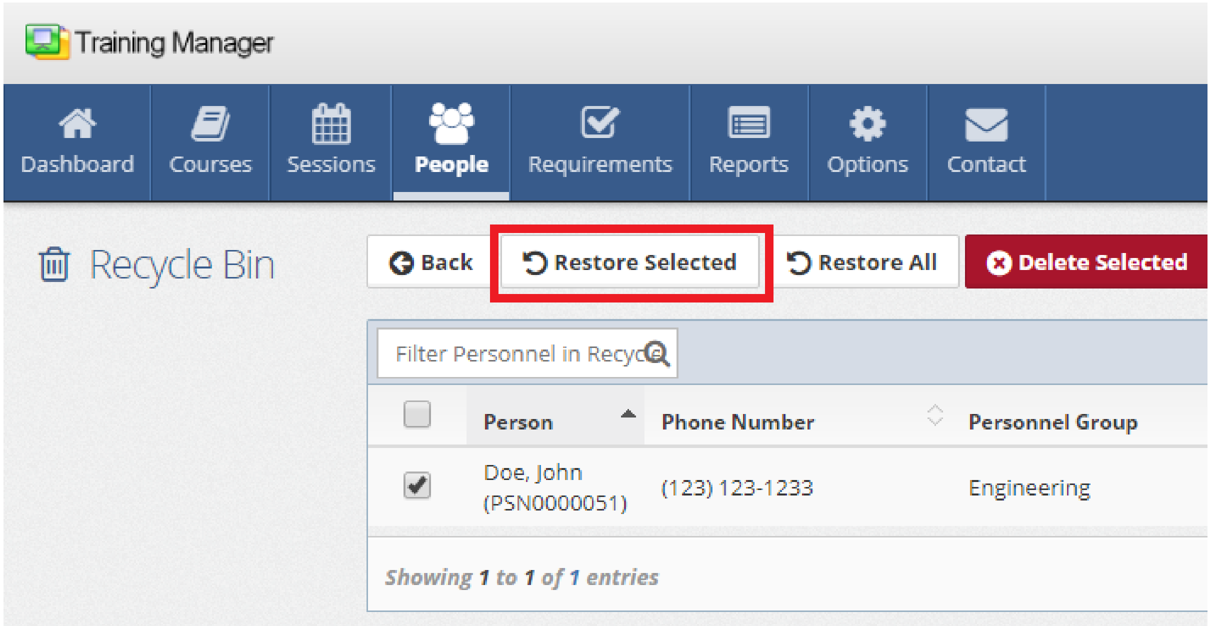
1. Click the **Recycle Bin** link located below the list of folders on the main People List page.



2. Locate the Personnel record to restore in the Recycle Bin, and **check the box** next to it.



3. Click the **Restore Selected** button to restore the selected Personnel record.



See Also

Personnel Details

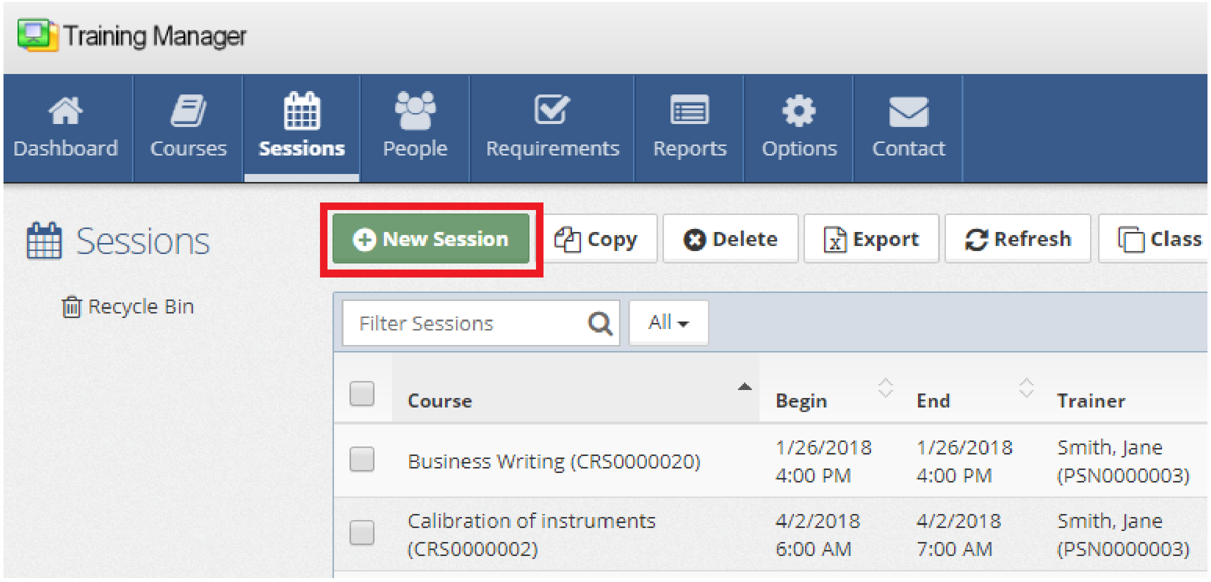
2.4 Manage Sessions

Select a topic below:

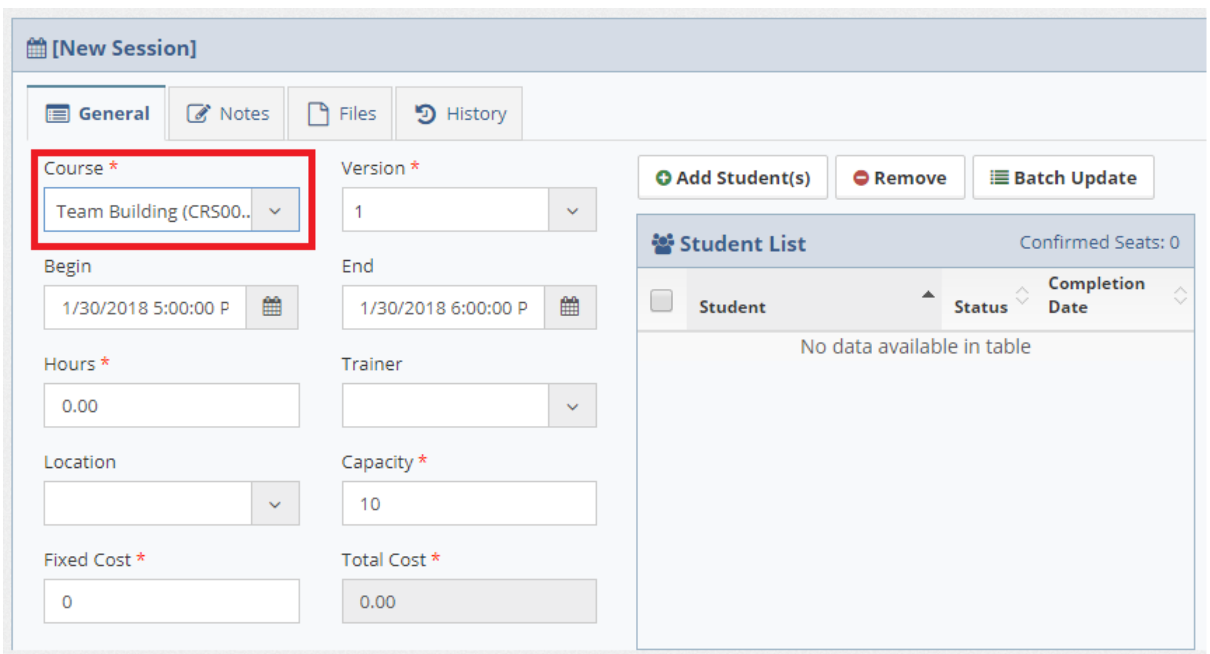
- Add New Sessions
- Edit Sessions
- Delete Sessions
- Restore Sessions

2.4.1 Add New Sessions

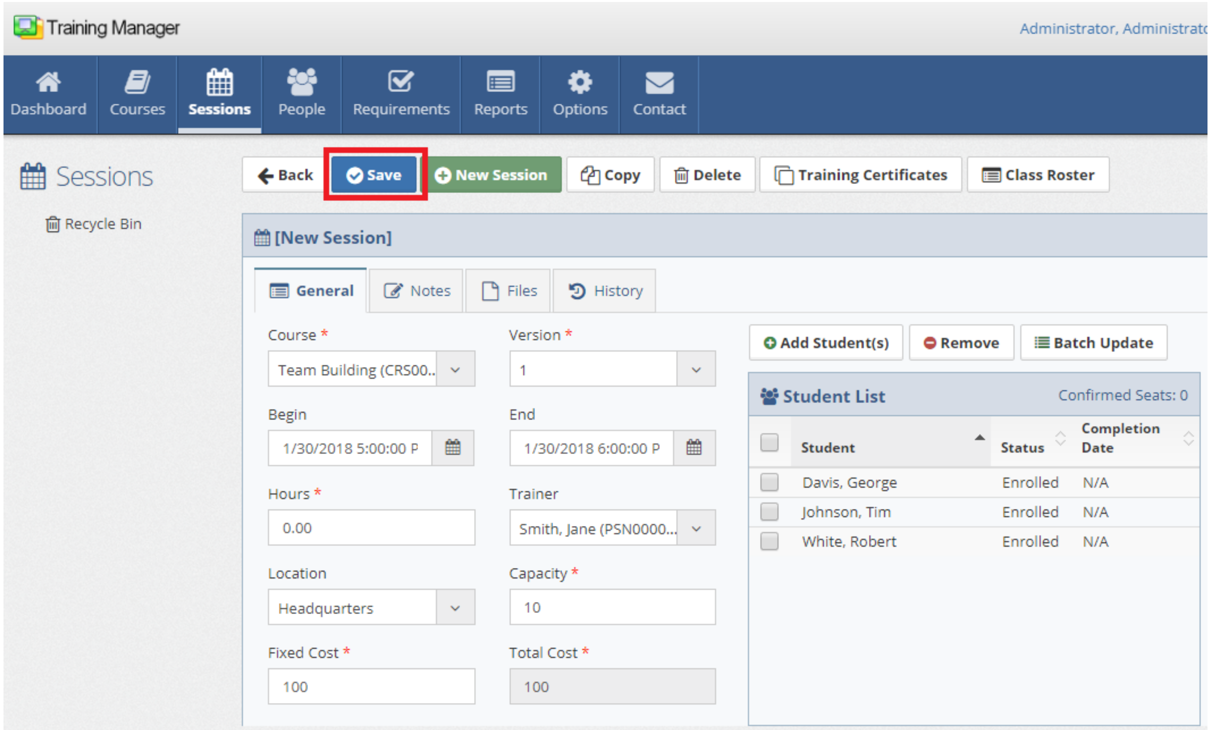
1. Click the **New Session** button located on either the Session List page or an existing Session Detail page.



2. Select a Course in the **Course** selection field on the new Session page.



3. Click the **Save** button to save the Session record after filling in any other fields as necessary.

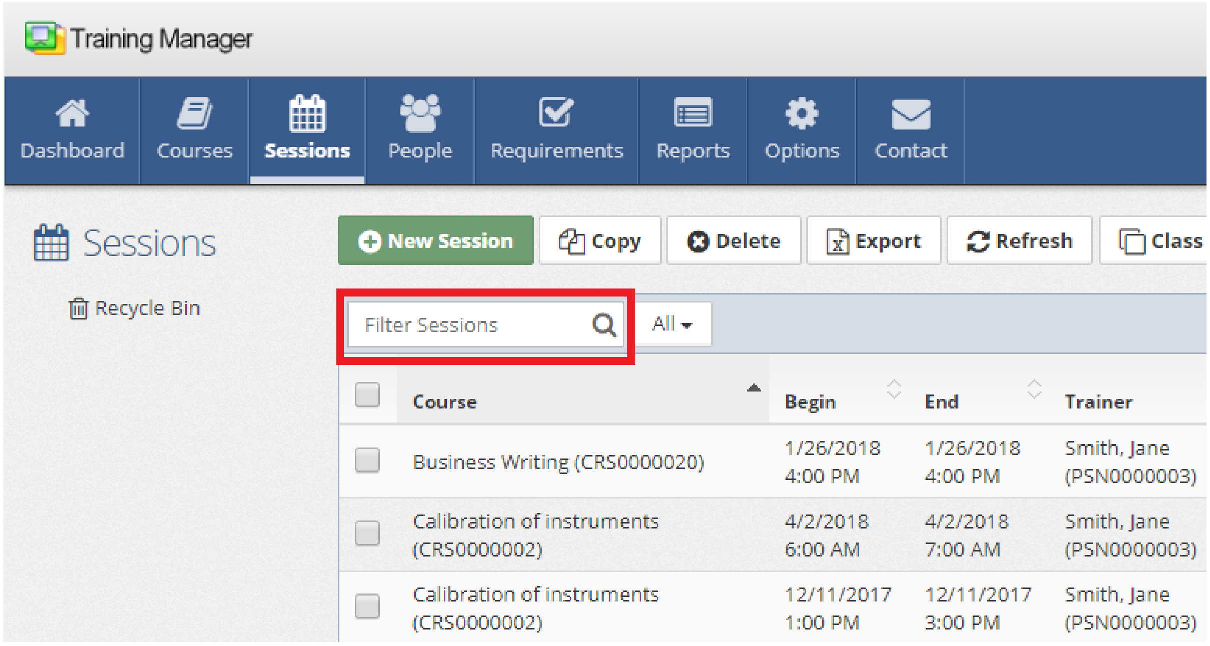


See Also

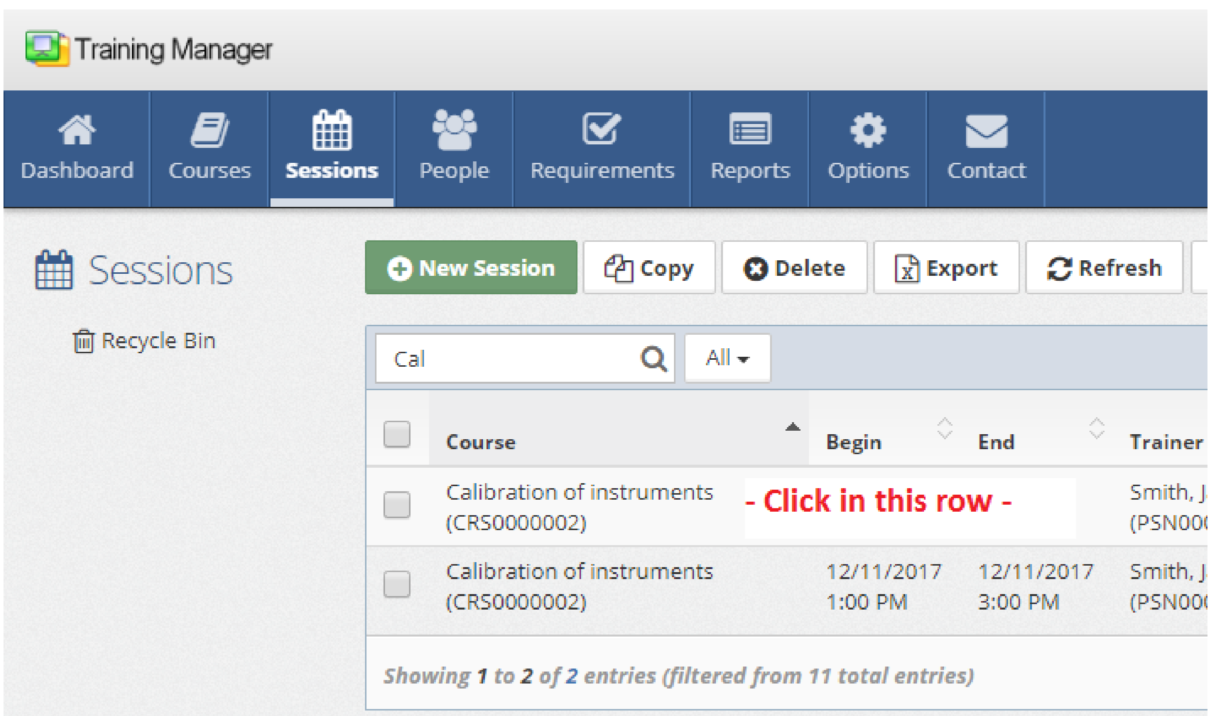
[Session Details]

2.4.2 Edit Sessions

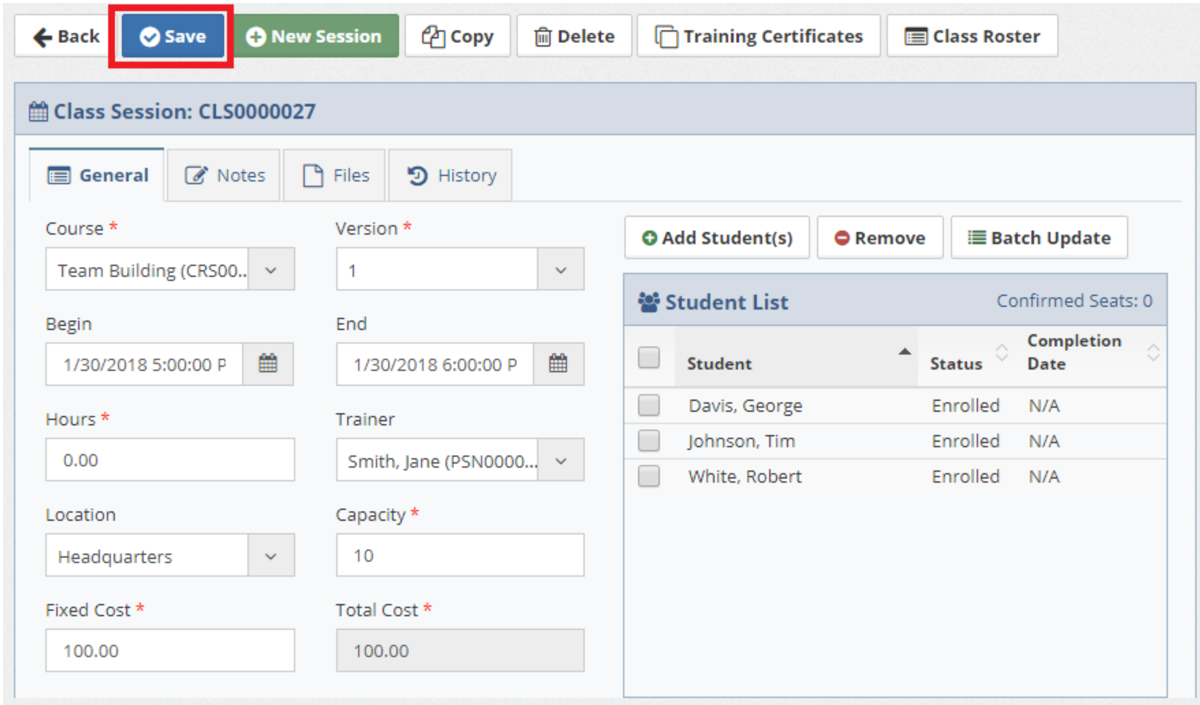
1. Locate the Session record to edit by placing your cursor in the **Filter Sessions** box on the Session List page, and then type a few characters of the Course Title or the Session Number.



2. Click on the row containing the Session record to open the Session Detail page.



3. Type or select a new value in the fields as needed, and then click the **Save** button.

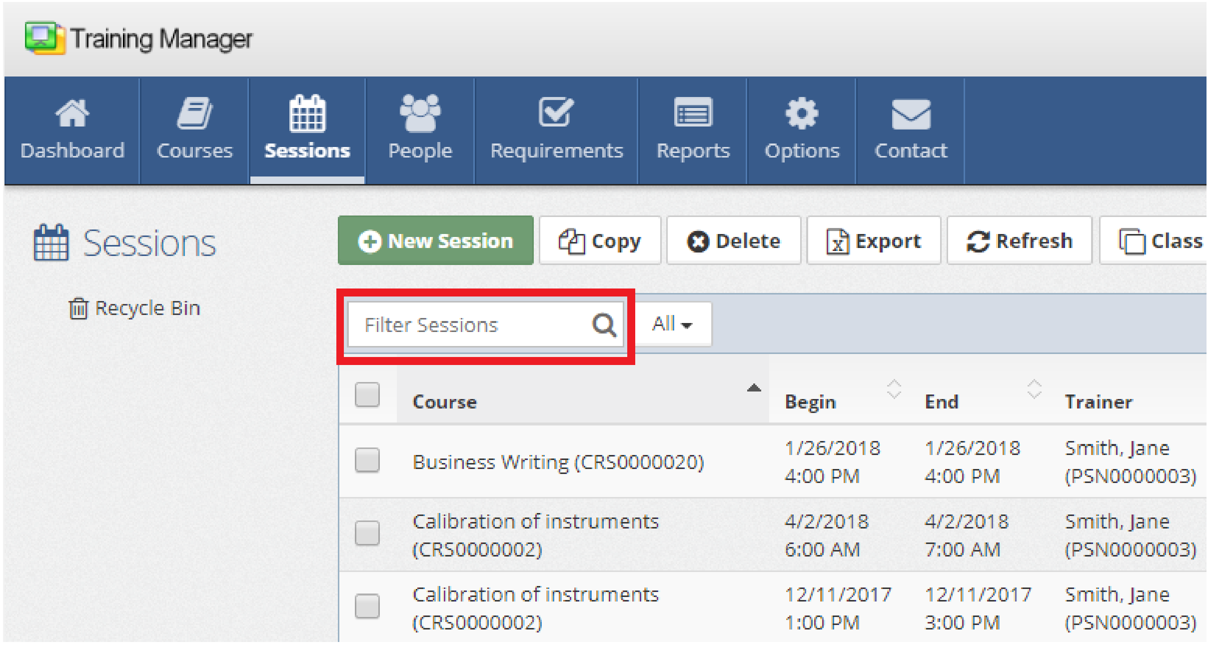


See Also

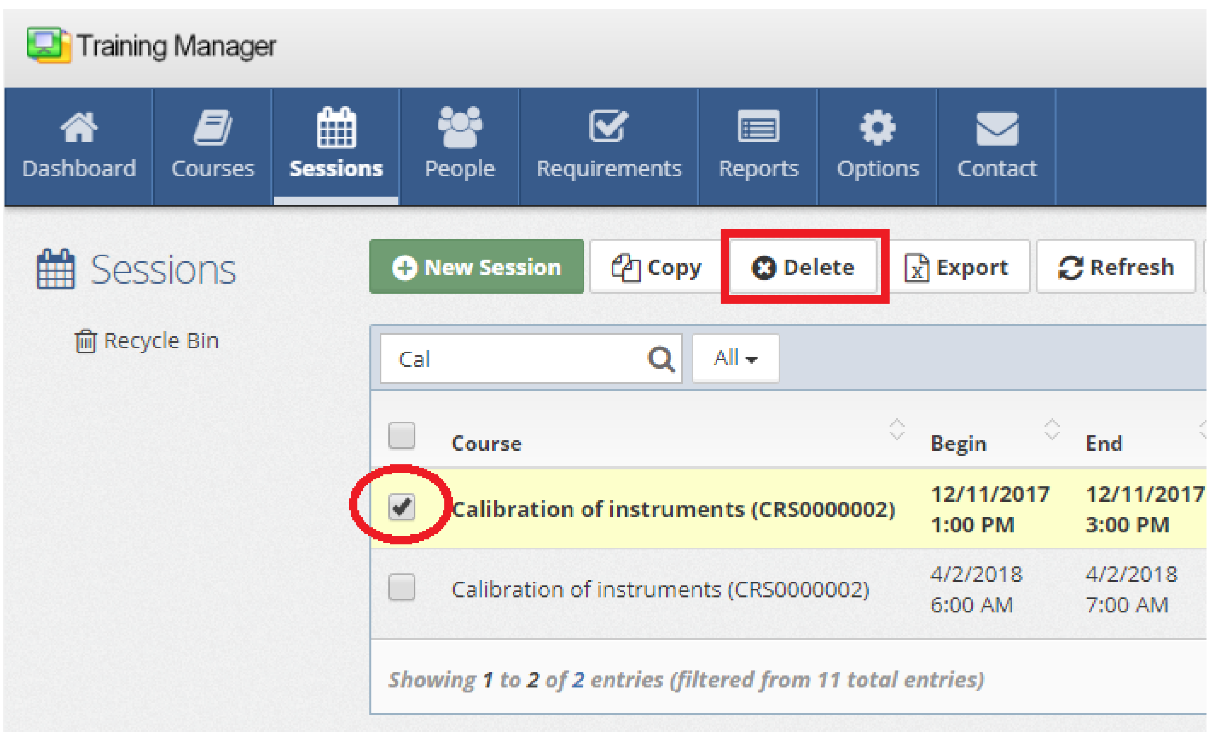
Session Details

2.4.3 Delete Sessions

1. Locate the Session record to edit by placing your cursor in the **Filter Sessions** box on the Session List page, and then type a few characters of the Course Title or the Session Number.



2. Place a check in the box next to the Session record which you wish to delete, and then click the **Delete** button in the Session List toolbar, or open the Vendor Detail page, and then click the "Delete" button.

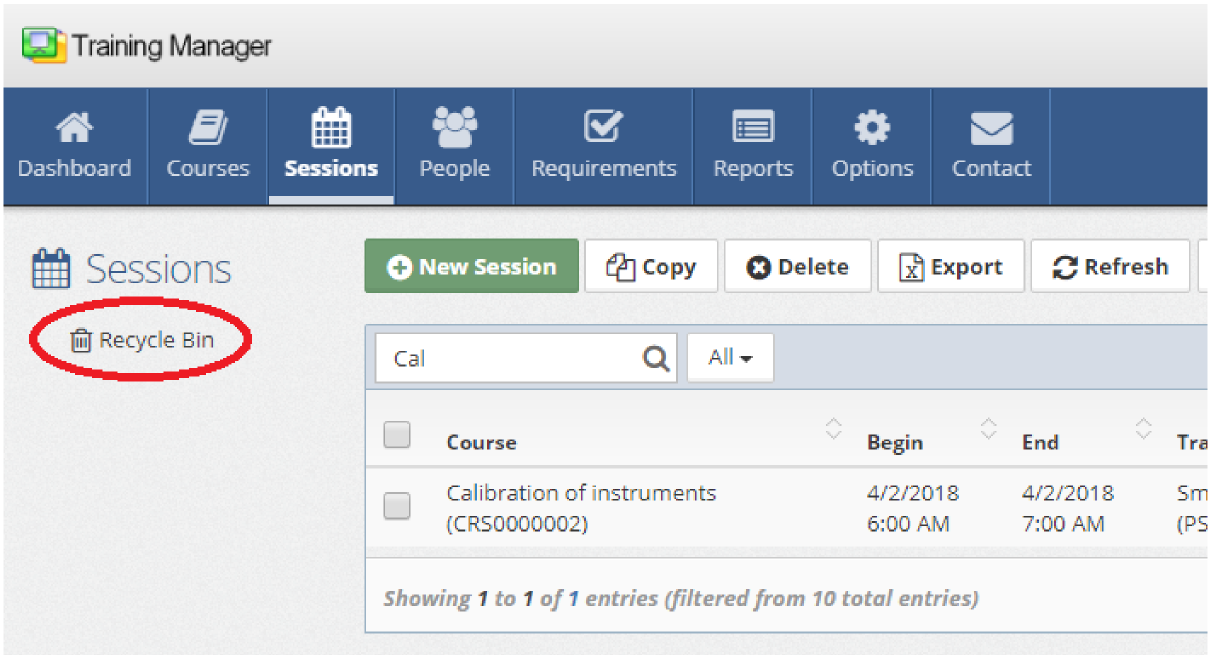


See Also

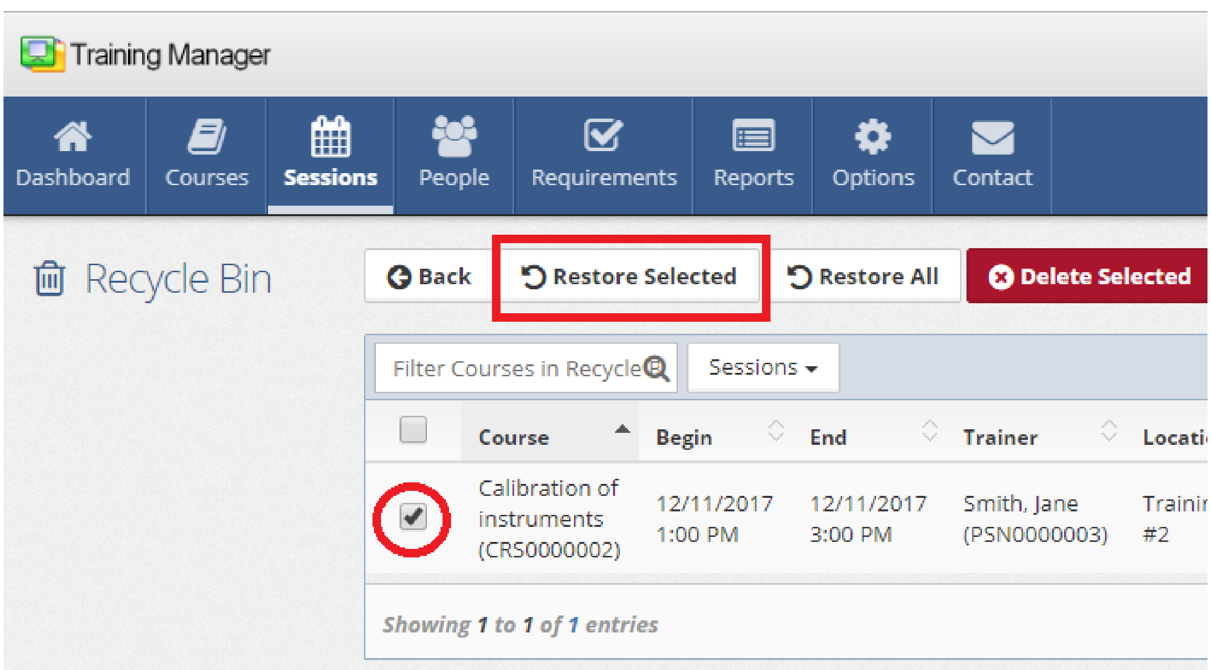
[Session Details]

2.4.4 Restore Sessions

1. Click the **Recycle Bin** link located below the list of folders on the main Sessions List page.



2. Locate the Session record to restore in the Recycle Bin, and **check the box** next to it. Then, click the **Restore Selected** button to restore the selected training record.



See Also

[Session Details](#)

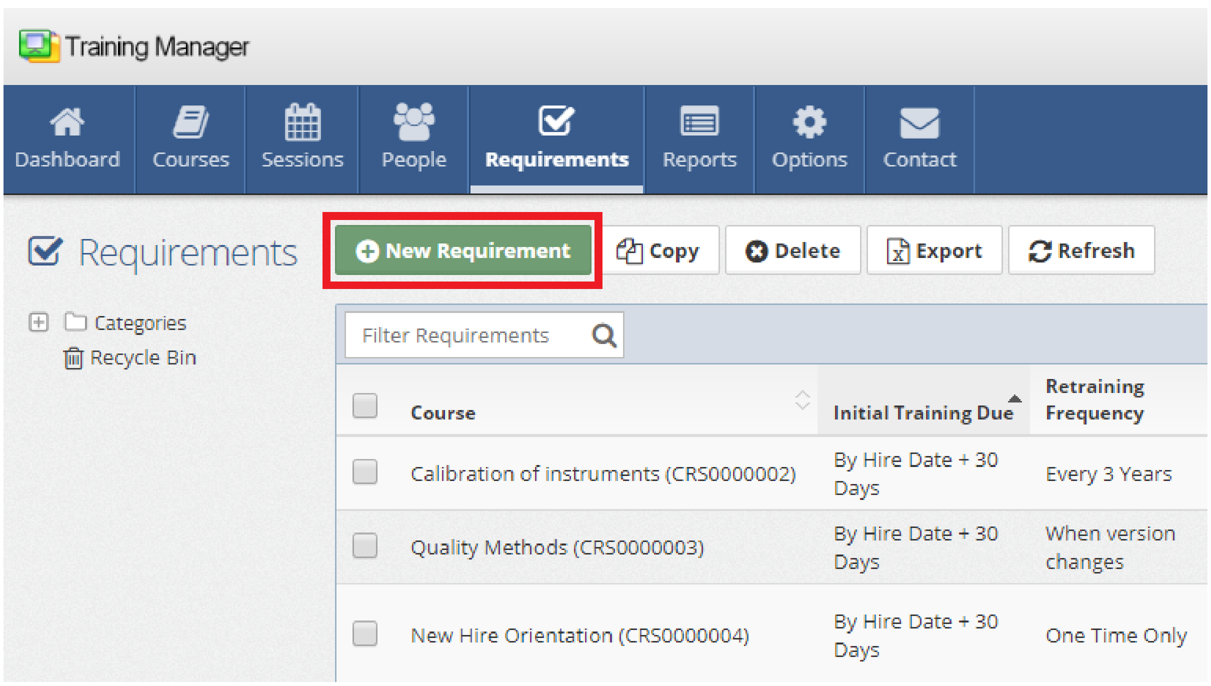
2.5 Manage Requirements

Select a topic below:

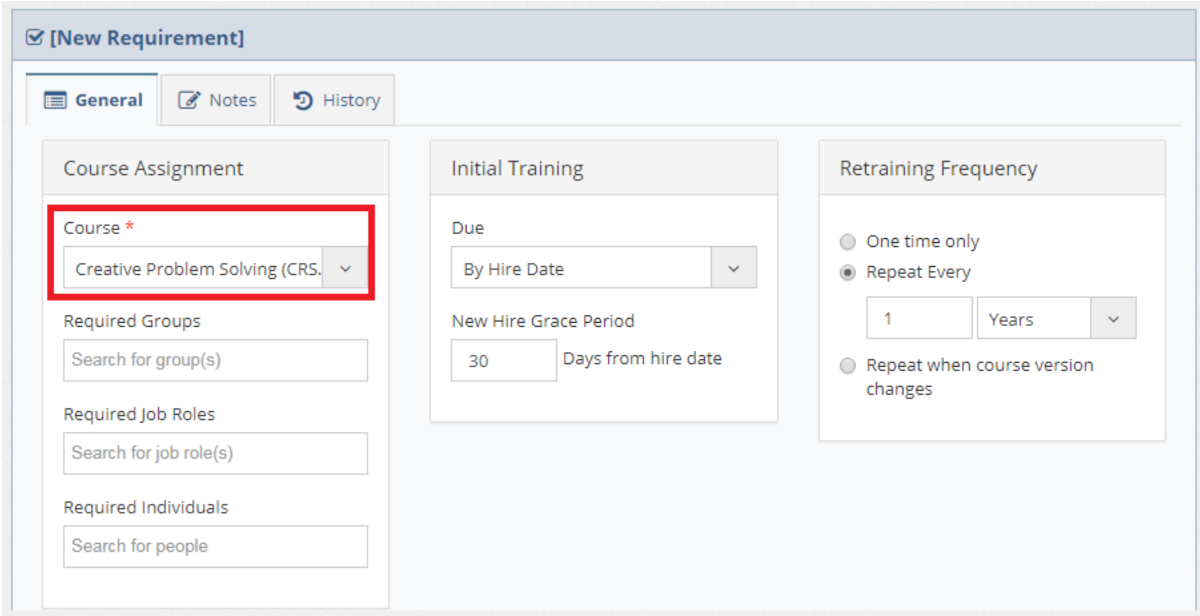
- Add New Requirements
- Edit Requirements
- Delete Requirements
- Restore Requirements

2.5.1 Add New Requirements

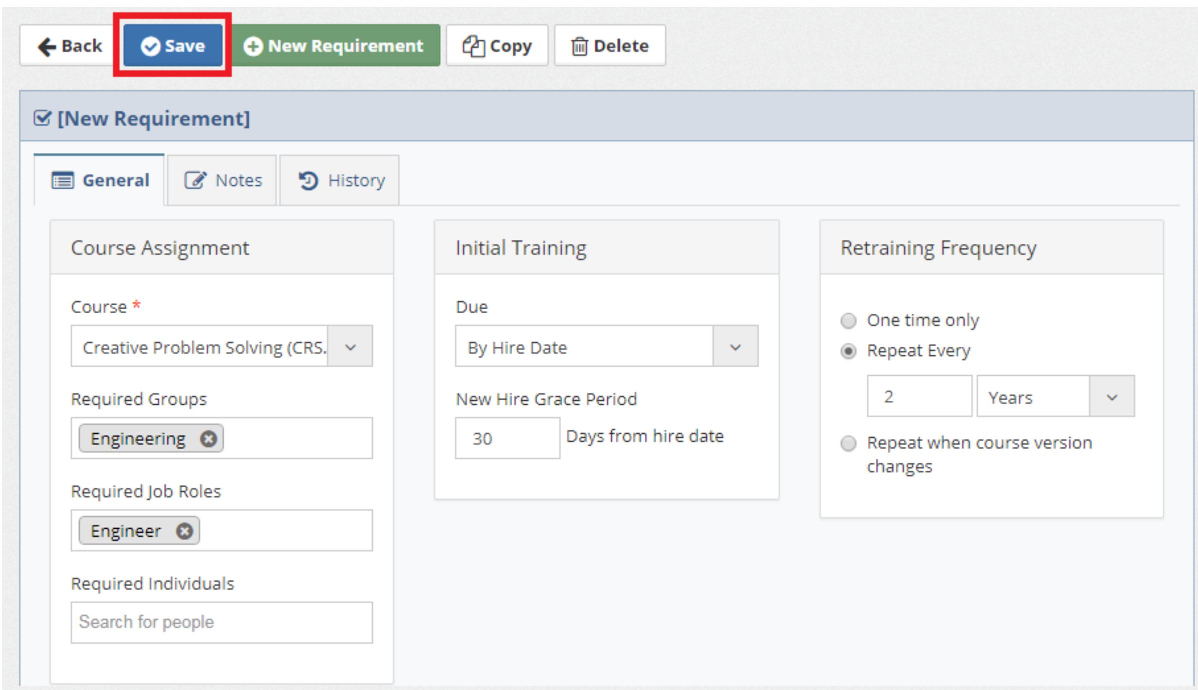
1. Click the **New Requirement** button located on either the Requirement List page or an existing Requirement Detail page.



2. Select a Course in the **Course** selection field on the new Requirement page.



3. Click the **Save** button to save the Requirement record after filling in any other fields as necessary.



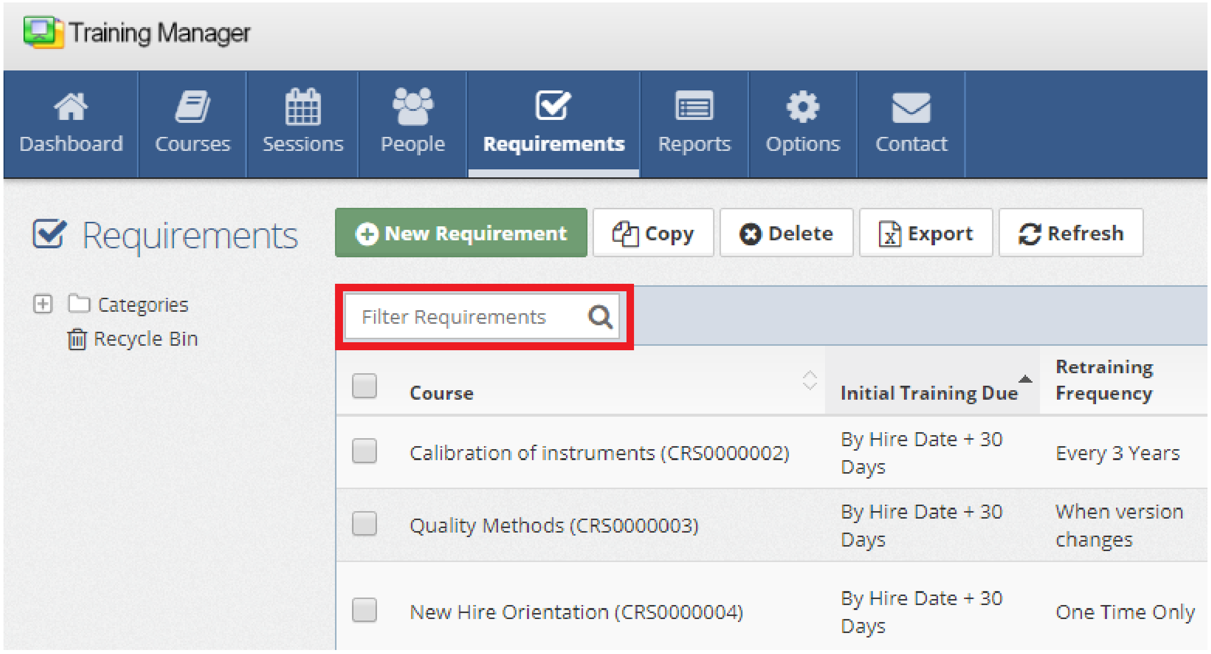
See Also

[Requirement Details](#)

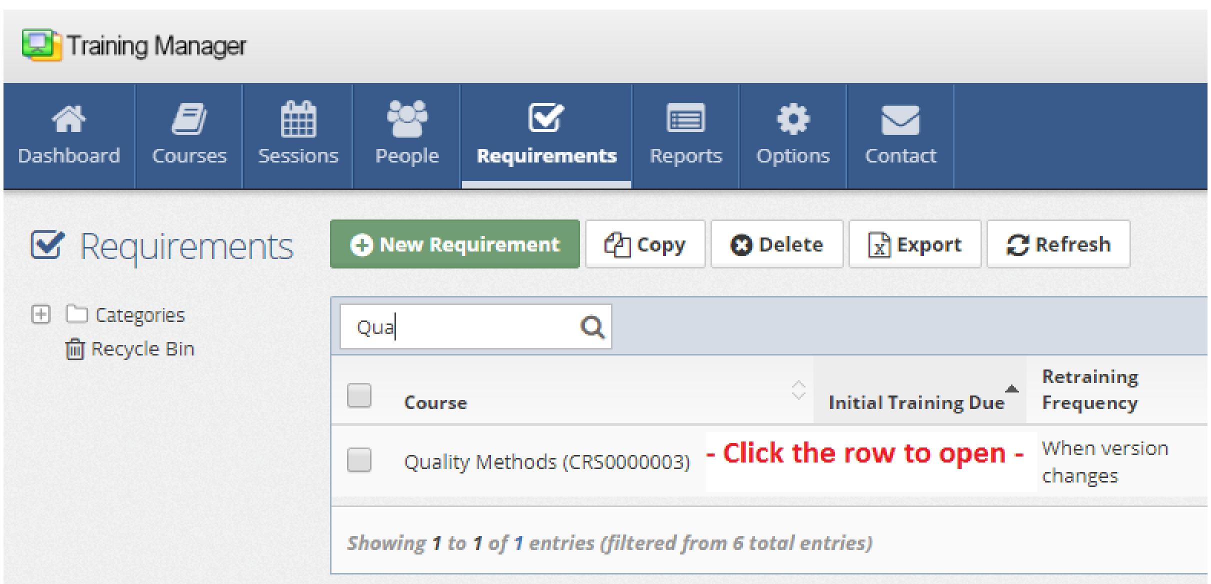
2.5.2 Edit Requirements

1. Locate the Requirement record to edit by placing your cursor in the **Filter Requirements** box on the

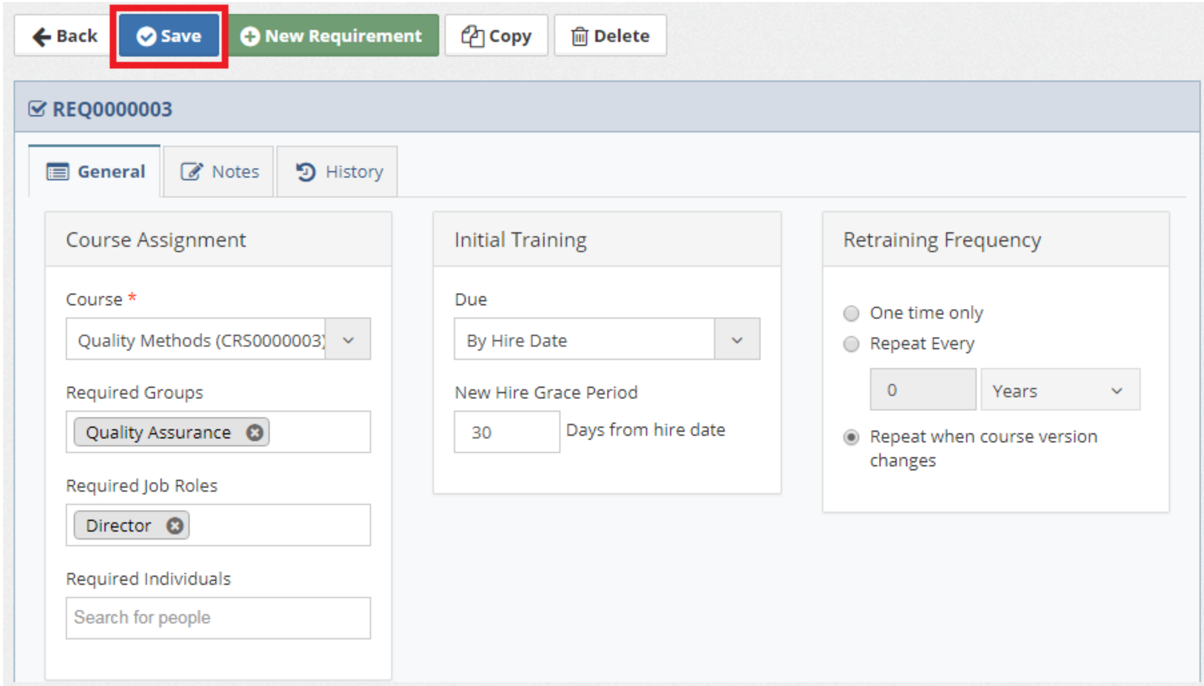
Requirement List page, and then type a few characters of the Course Title.



2. Click on the row containing the Requirement record to open the Requirement Detail page.



3. Type or select a new value in the fields as needed, and then click the **Save** button.

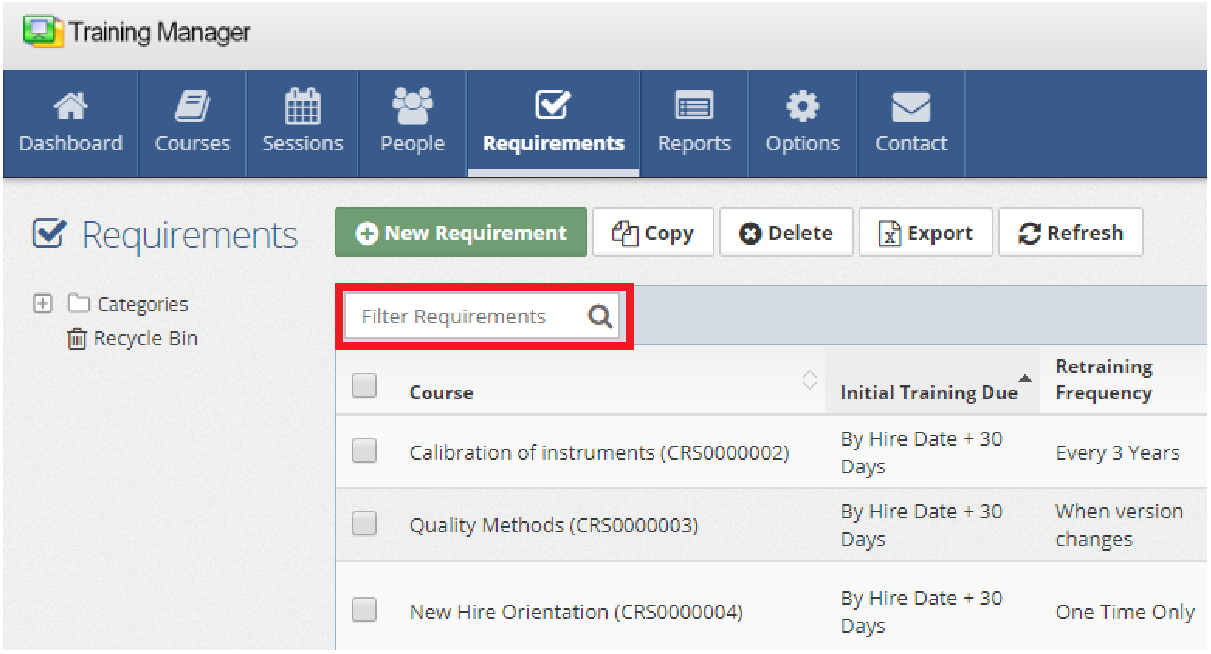


See Also

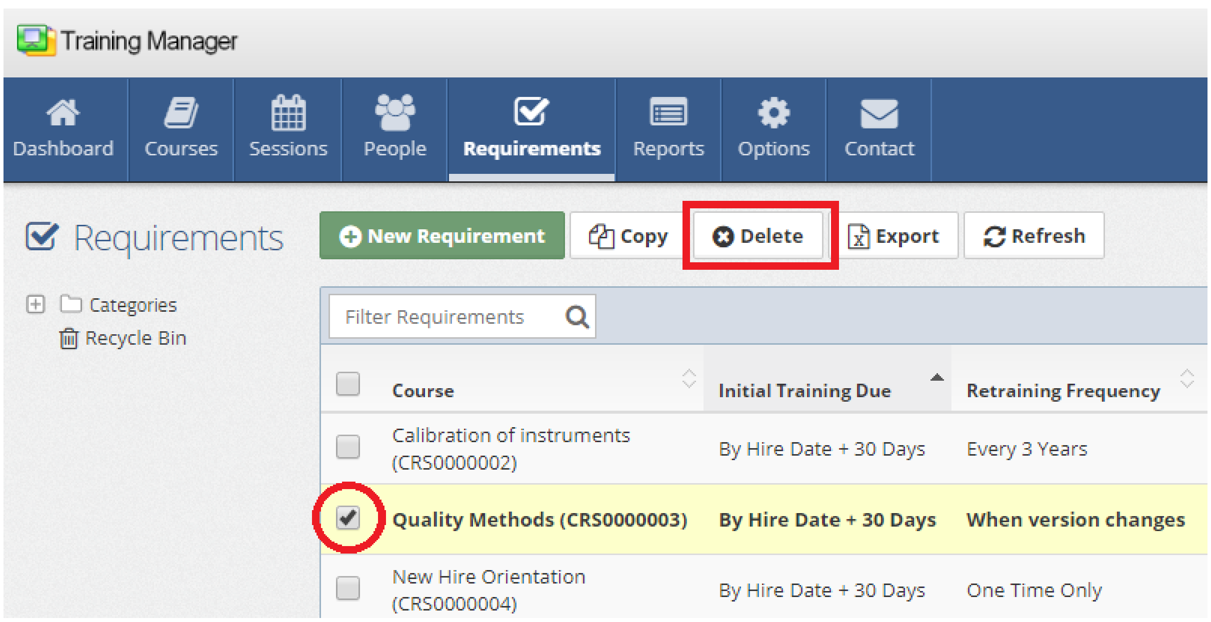
Requirement Details

2.5.3 Delete Requirements

1. Locate the Requirement record to delete by placing your cursor in the **Filter Requirements** box on the Requirement List page, and then type a few characters of the Course Title.



2. Place a check in the box next to the Vendor record which you wish to delete, and then click the **Delete** button in the Requirement List toolbar, or open the Requirement Detail page, and then click the "Delete" button.

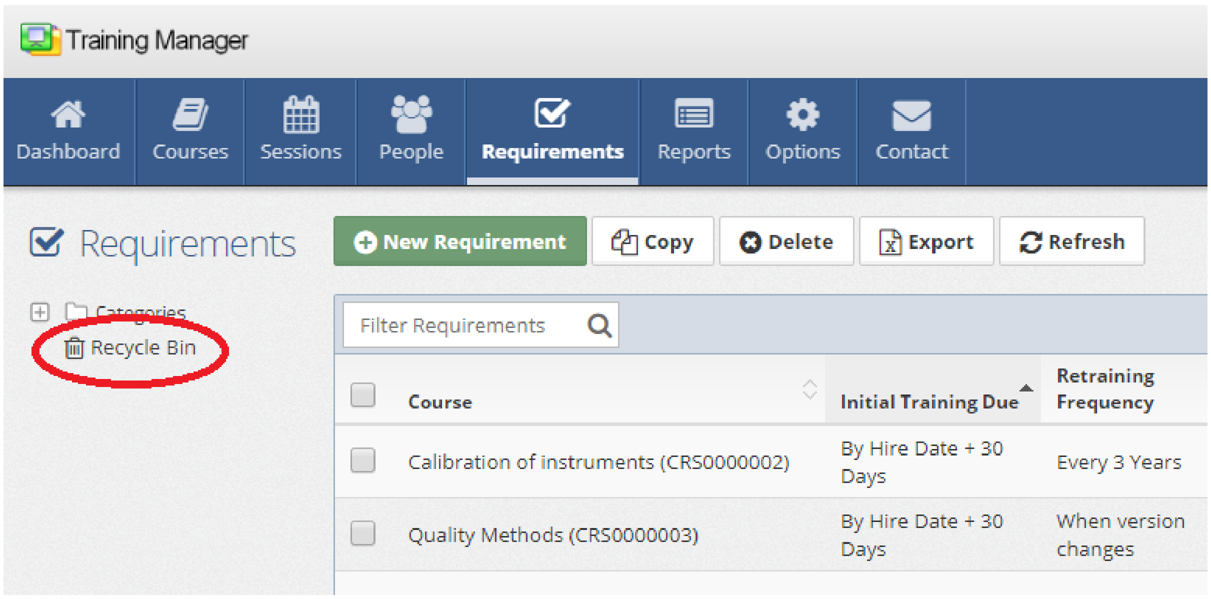


See Also

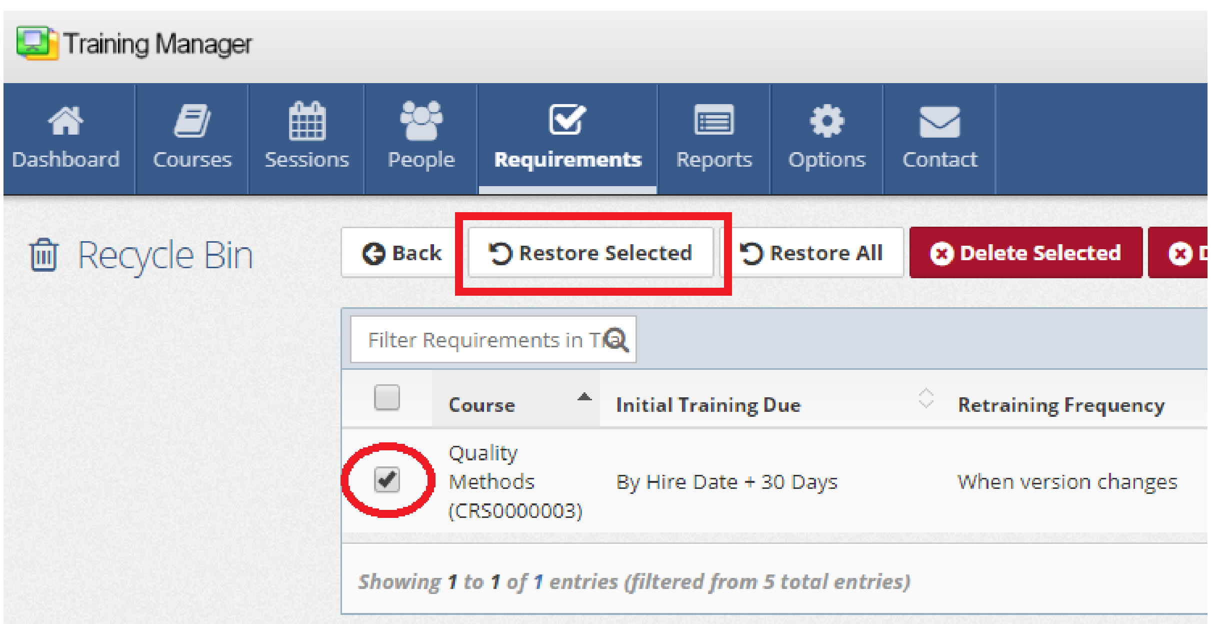
[Requirement Details]

2.5.4 Restore Requirements

1. Click the **Recycle Bin** link located below the list of folders on the main Requirements List page.



2. Locate the Requirement record to restore in the Recycle Bin, and **check the box** next to it. Then, click the **Restore Selected** button to restore the selected requirement record.



See Also

[Requirement Details]

2.6 Add Completed Training

When a student or students have completed training, it is important to set the training Status to completed, and confirm the completion date in order for the status reports to accurately display the current training status. There are two options available for adding completed training:

Option 1: Several people were trained all on the same date

1. Open a new class session record on the class session page by clicking the "New Session" button.
2. Fill in the session information on the left, and then click the "Add Students" button on the right to add the students who attended the session.
3. Select all of the students in the list view and click the "Batch Update" button.
4. Set the Status to "Completed", and confirm the Completion Date.
4. Save the record - this will record the training for all of the students in the session at once.

Note: in option 1, transcript records will be created automatically based on the information in the class session record.

Option 2: An individual completed training

1. Open the personnel form for the individual and select the Transcript tab.
2. Select the Training Record to update, or click the New Training Record button, fill in the Course fields, and set the Status field to complete.
3. Fill in the remaining information as needed, and then click the "Save" button to save the record.

Note: in option 2, a class session record will be created automatically if an existing related session record is not selected.

2.7 Add Company Name and Logo on Report

You can customize the report headers to include your company name and logo.

To list your company name and logo on reports:

1. Select the main "Reports" page using the button at the top of the page.
2. Click the "Report Options" link on the left.
3. Edit the Header to include your Company Name, and set the Footer to include a disclaimer if wanted.
4. Set the default paper size if needed, and then select a logo file. A logo design which is wider than it is tall, and on a white background works best.

2.8 Set Up Annual Training Requirements

Training Requirements (sometimes referred to as a "Training Matrix") can be set up on the main "Requirements" page. Re-training requirements can be based on the last trained date or on a specific calendar schedule. See the information below for each option:

Option 1 - Set the frequency to "Repeat every 1 year":

A common option for annual training is to set the Frequency for the Required Training to repeat every 1 year. In this case, the next training date is based on when the training was last completed. For example, if a person completes the training on 4/15/2017, that person will be due for training again on 4/15/2018 (i.e. 1 year from the date of their last training). The next due date is based on the training Completion Date. This date may be set differently (or the same) for each person enrolled in a class session. The "Initial Due Date" for the Training Requirement does not impact the re-training date. The "Initial Due Date" is used to provide a grace period in order to prevent the status from immediately appearing as "Overdue" for a new Requirement for which personnel have not had time to be trained on yet.

Option 2 - Set the frequency to "Repeat when course version changes":

Specific re-training dates can also be managed through course versions. For example, you may create a Training Requirement and set the frequency to "Repeat when course version changes". Then, on the Course Version History tab of the Course Details page, set up the dates when the course version changes - such as:

Version 1: Effective Date: 1/1/2017
Version 2: Effective Date: 1/1/2018
Version 3: Effective Date: 1/1/2019
,etc.

This option allows you to pre-define the re-training dates instead of having the re-training dates vary for each individual based on their last trained date.

2.9 Add an External Trainer

All personnel (internal and external) are tracked on the Personnel tab. You may distinguish an external trainer from your internal organization as follows:

1. Create a personnel group named, "External Trainers", "Outside Trainers", or "Service Providers", etc. per your organization's terminology.
2. For each external trainer, open the personnel form, and set their group to the name of the group you created in Step 1.
3. In addition, be sure to set the option labeled, "Exclude from required training" to "Yes". This will ensure that the outside trainer does not appear on your required training reports (for example, for training which is required for "All Groups").
4. Also, set the "Is a Trainer" option to "Yes". As with all trainers, this option must be set in order for the trainer name to appear in the Trainer list when creating a new Class Session record.

2.10 Export a Report

Reports may be previewed and printed on the main Reports page. Additional options including the option to export the report to another format are also available. This can be helpful if you would like to distribute the report outside of the Training Manager system. There are several export formats available. PDF Format is a popular choice to retain the formatting, and allow others to open the report with the free Adobe Acrobat Reader software.

Here are the steps to export a report:

1. Select the report to export on the main "Reports" page, and set the Group By and Filter options as needed.
2. Select the file format option (located in the toolbar just above the report selection area), and then click the "Export and show in new window" icon.

2.11 Set or Change a Password

Training Manager has a options to "Set" or "Change" a password:

1. A System Administrator can "Set" a password without knowing the current password.
2. A Data Administrator or Viewer can "Change" their password using the "Forgot Password" link on the login page.

Option 1 - "Set" a password using System Administrator privilege:

1. Open Training Manager and log in with an account which is in the System Administrator role.
2. Open the Personnel Details page for the person's password you would like to set.
3. Click the "Set Password" button located on the Account tab.
4. Type the password in the "New Password", and then click the "Set New Password" button.

Option 2 - "Change" a password using the "Forgot Password" link:

1. Go to the Login Page, or Log off if you are currently logged in.
2. Click the "Forgot Password" link located below the Password field.
3. Enter your email address in the space provided, and click the Email Link button.
4. Check your email, and click the Reset Password link.
5. Fill in your Email and Password information to complete the change.

2.12 Add a New User

Training Manager users are managed on the main Personnel page. A user can be assigned any of the following permissions:

- **Viewer**: Can view all areas of the database but cannot make any changes to the data.
- **Data Administrator**: Can view and edit all areas of the database except user permissions and company settings.
- **System Administrator**: Can view and edit all areas of the database including user permissions and company settings.

To set up a new user:

1. Locate the personnel record for the user, or create a new one if needed.
2. Set their "Email Address" on the General tab.
3. Assign a Login Name and set a Password if desired on the personnel details page - Account tab for this user.
4. Select a Role ("Viewer", "Data Administrator", or "System Administrator") in the System Role field.
5. Save the record.
6. Send a link to the user, and inform them of their Login Name and Password, or instruct them to use the "Forgot Password" link to reset their password.

3 Reference

- Course Details

- [Personnel Details]
- [Session Details]
- [Requirement Details]

3.1 Course Details

Toolbar Buttons

Field or Form Element	Description
Back button	Click the Back button to go back to the previous page.
Save button	Click the Save button to save the course.
New Course button	Click the New Course button to begin a new course record.
Copy button	Click the Copy button to create a copy of the record.
Delete button	Click the Delete button to delete the Course. This will move the Course record to the Recycle Bin. It will not be permanently deleted until it is deleted from the Recycle Bin.

General Tab

Field or Form Element	Description
Course Title	A text field which contains the name of the training.
Course Number	The Course Number is a unique number which identifies the Course record in the database. Leave this field blank to have Training Manager assign the number for you, or set the value manually according to your company course numbering convention.
Category	A selection field which contains the list of **Course Categories**. You may add a new Course Category by right-clicking on the folder in the hierarchy on the left, and then selecting the "New" context menu option.
Credits	A numeric field which indicates how many Credits the Course is worth.
Status	A selection field which indicates whether the Course is "Active" or "Inactive". To retain historical training data for Courses which are no longer in use, set the Status to "Inactive". This will allow you to exclude or include the Inactive records in reports as needed.
Default Location	A selection field which represents the default Location that will be set when creating a new Class

	Session record. The selection values available in this field include all Locations configured in the Location hierarchy folders located on the left side of the main "People" tab.
Default Trainer	A selection field which represents the default Trainer that will be set when creating a new Class Session record. The selection values available in this field include personnel who have the "Is Trainer" field set to "Yes".
Default Fixed Cost	A numeric field which indicates the default "Fixed Cost" that will be set when creating a new Class Session record.
Default Student Cost	A numeric field which indicates the default "Student Cost" that will be set when creating a new Class Session record. The Student Cost on the Session record is used for each student added to the Session. The total cost is the Fixed Cost + the sum of the Student Costs.

Version Tab

Field or Form Element	**Description**
Required	A toggle field (Yes/No) which indicates whether the course version is required. This field is used in conjunction with "Version based" Requirements (it has no impact if you do not have Requirements set up for the course). You can set it to "No" for minor changes in a training document such as a typo, so it doesn't require re-training. Set to "Yes" if the change does require re-training.
Version	A numeric field used to track the version number for a course.
Effective Date	A date field to record when the Course Version becomes effective. If you have version based Requirements configured, this is the date when the new version becomes effective, and it is the deadline for re-training to avoid an "Overdue" status.
Document Number	A text field which allows numbers and letters to identify the Document Number used for training materials (for example an SOP Number).
Document Version	A text field which allows numbers and letters to identify the version of document used for training with the corresponding course version.
Document Title	A text field to identify the Document Title used for training materials (for example an SOP Title or the name of the document used for training).

Requirements Tab

Field or Form Element	Description
List of Course Requirements	List of training Requirements for the selected Course. See the Requirement Details.

Notes Tab

The Notes tab is a place where you can enter free-form rich text notes.

Files Tab

The Files tab contains a list of files which have been uploaded for the Training record.

History Tab

The History tab contains a list of updates to the Course record. Click on any row for more details about the change.

3.2 Personnel Details

General Tab

Field Name	Description
First Name	The first name of the person.
Last Name	The last name of the person.
Personnel Number	You may leave the field blank to have Training Manager assign a personnel number, or manually enter a personnel number.
Phone Number	The phone number for the person.
Email Address	The email address for the person.
Hire Date	The date when the person was hired.
Classification	A selection field for the person's Classification (Full-Time, Part-Time, Contractor, Consultant, etc.). You can set the values for this selection field on the Options page - Selection Fields.
Status	A selection field which indicates whether the Course is "Active" or "Inactive". To retain historical training data for Courses which are no longer in use, set the Status to "Inactive". This will allow you to exclude or include the Inactive records in reports

	as needed.
Shift	A selection field for the person's shift (1st Shift, 2nd Shift, etc.). You can set the values for this selection field on the Options page - Selection Fields.
Group	A selection field for the Personnel Group that the person belongs to. You can manage the names in the list by right-clicking on the Group folder list on the left side of the page.
Location	A selection field for the Location of the person. You can manage the names in the list by right-clicking on the Location folder list on the left side of the page.
Supervisor	A selection field for the Supervisor of the person. This available names include Personnel with the "Is Supervisor" field set to "Yes".
Job Role(s)	A list of Job Roles for this person.
Is a Supervisor?	A Yes/No field indicating whether the person is a Supervisor.
Is a Trainer?	A Yes/No field indicating whether the person is a Trainer.
Excluded from Required Training?	A Yes/No field indicating whether the person is excluded from Required Training.
Picture Box	A field for uploading a photo of the person.

Account Tab

Field Name	Description
Login Name	You may enter a different login name if the user will not be using their email address to login.
System Role	The System Role field is used to assign the functions available to the user. • **Viewer**: The default role is “Viewer”. A viewer cannot make changes to any data. • **Data Administrator**: A “Data Administrator” has access to view, edit, add, and delete Courses, Personnel, Sessions, Requirements, and selection fields. Data Administrators cannot make changes to Company Options, empty the recycle bin (permanent delete), or set passwords. • **System Administrator**: A “System Administrator” has full access to all areas of the system including Company Options, Recycle Bin (permanent delete), and setting passwords.
Scope	The Scope field is used to assign the data access available to the user. • **Company:** Access to the data for all personnel

	in the system. • **Individual:** Access to the data for the individual user's training records only. • **Group:** Access to the training data for the individual's Group. • **Location:** Access to the training data for the individual's Location. • **Direct Reports:** Access to the training data for the individual's Direct Reports.
Timezone	The timezone for the person.
Set Password button	If you are a System Administrator, you can use this button to set the user's password.
Transfer System Administrator link	Use this link to transfer your System Administrator permissions to another user.

Transcript Tab

Field Name	Description
Course	A selection field for the Course which was taught in this training record.
Version	A selection field for the Course Version.
Status	The timezone for the person.
Completion Date	If you are a System Administrator, you can use this button to set the user's password.
Score	Use this link to transfer your System Administrator permissions to another user.
Student Cost	A numeric field for the "Student Cost" (per Student).
Notes	A text field for any notes related to this training record.
Related Session	The related Session record for this training record. You may select an existing Session, or one will be created for you.
Trainer	A selection field for the Trainer for this training record.
Location	A selection field for the Location where the training occurred.

Requirements Tab

Field Name	Description
A list of training Requirements for the person.	A list of training Requirements for the person. See the Requirement Details.

Notes Tab

The Notes tab is a place where you can enter free-form rich text notes.

Files Tab

The Files tab contains a list of files which have been uploaded for the Personnel record.

History Tab

The History tab contains a list of updates for the Personnel record.

3.3 Session Details

General Tab

Field Name	Description
Course	The Course which was taught in this Session.
Version	The Course Version for this Session.
Begin	The Date and Time when the Session began.
End	The Date and Time when the Session ended.
Hours	The number of hours for the Session (leave empty to auto-calculate).
Trainer	The Trainer for this Session.
Location	The Location where the training took place.
Capacity	The Capacity of the training room.
Fixed Cost	The fixed cost for conducting the training.
Total Cost	The total cost including the Fixed Costs + sum of the per Student Cost (auto calculated).
Add Student Button	The "Add Student" button is used to add 1 or more Students to the Session.
Remove Student Button	The "Remove Student" button is used to remove 1 or more Students from the Session.
Batch Update Button	The "Batch Update" is used to update multiple training records at once. For example, to set all Students training Status to "Complete".
Student [In the Student List Details]	The Student who attended the training session.
Status [In the Student List Details]	The Status of the student's training (i.e. Completed, Failed, etc.)
Completion Date [In the Student List Details]	The date when the training was completed. This date may differ from the Session "End Date" in some cases. For example, if a person is required to complete some additional tasks prior to being granted credit for completing the training.
Score [In the Student List Details]	The person's score (if a test was given)
Student Cost [In the Student List Details]	The cost for the student's training.

Notes [In the Student List Details]	A text field for adding Notes related to the training record.

Notes Tab

The Notes tab is a place where you can enter free-form rich text notes.

Files Tab

The Files tab contains a list of files which have been uploaded for the Vendor.

History Tab

The History tab contains a list of updates for the Vendor record.

3.4 Requirement Details

General Tab

Field Name	Description
Course	The Course which is required for training.
Required Groups	A list of Personnel Groups that are required to take the Course.
Required Job Roles	A list of Job Roles that are required to take the Course.
Required Individuals	A list of Individuals that are required to take the Course.
Excluded Groups	A list of Personnel Groups that are excluded from the requirement.
Excluded Job Roles	A list of Job Roles that are excluded from the requirement.
Excluded Individuals	A list of Individuals that are excluded from the requirement.
Initial Training Due	The date when the Initial (first) training is due.
New Hire Grace Period	A grace period for new hires to complete training before it will be "Overdue".
Retraining Frequency	How often re-training is required.

Notes Tab

The Notes tab is a place where you can enter free-form rich text notes.

Files Tab

The Files tab contains a list of files which have been uploaded for the Vendor.

History Tab

The History tab contains a list of updates for the Vendor record.