

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' page. The top section, 'Map Course to:', has four radio buttons: 'Company Level' (selected), 'Category', 'Company Level and Category', and 'Admin Level'. Below these are three dropdown menus: 'Select level to map:' (showing 'Department'), 'Select name(s):' (showing 'Choose Names...'), and 'Select course(s):' (showing 'Choose Courses...'). There are also checkboxes for 'Apply to new hire only:' and 'Complete By:'. The bottom section, 'Training Profiled', has four radio buttons: 'Course' (selected), 'Company Level', 'Category', and 'Admin Level'. Below these is a 'Select Courses:' dropdown showing 'All'. A 'View' link is at the bottom right. Two orange callout boxes are present: one on the right pointing to the 'Map Course to:' section with the text 'This is where you can assign/profile training from the options available.', and another on the right pointing to the 'Training Profiled' section with the text '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 of the 'Map Course to:' section. The 'Company Level' radio button is selected. The 'Select level to map:' dropdown menu is open, showing a list of options: 'Department', 'Company', 'Country', 'Province', 'Site', and 'Department' (highlighted in blue). The 'Select name(s):' and 'Select course(s):' dropdowns are also visible.

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

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

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.

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.

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

Fixed Yearly 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/started or within the user’s date of hire.

Apply to new hire only:	<input checked="" type="checkbox"/>
New Hire Date:	<input type="text" value="June 15, 2023"/>
Complete By:	<input checked="" type="checkbox"/>
	<div>Within Time Frame ▾</div>
	<div>Within Course Started ▾</div>
	<div>30 ▾ Day ▾</div>

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