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.

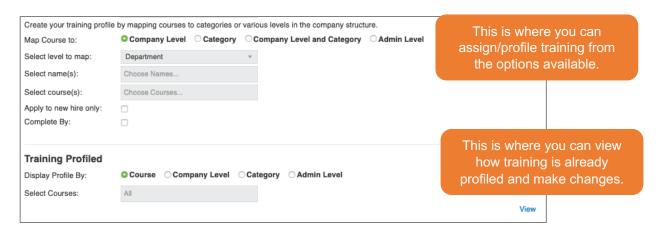
In addition, companies are also able to assign due dates to specific courses within a training profile. For example, perhaps you want WHMIS completed by January 1st of each year. Due dates are reflected on the user's Training list.

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

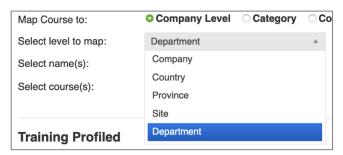
Step 2: Select **Edit Company Training Profile**. If you do not have this setting, you do not have permission. Please speak with your corporate office or call your Systems 24-7 provider for further assistance.



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.



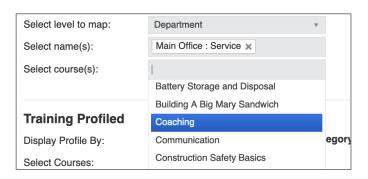
Step 4: While **Company Level** is selected to map the course to, select the company level to map to, such as department.



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.



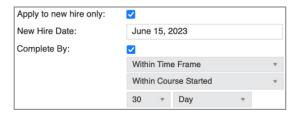
Step 8: If you wish to apply a 'complete by' date (also known as due date) to this training profile, check off the option. You will have a couple of options to assign this due date.



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.



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