USER GUIDE

Employee Settings

Administration User Guide

SYSTEMS24-7

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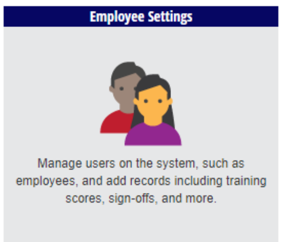
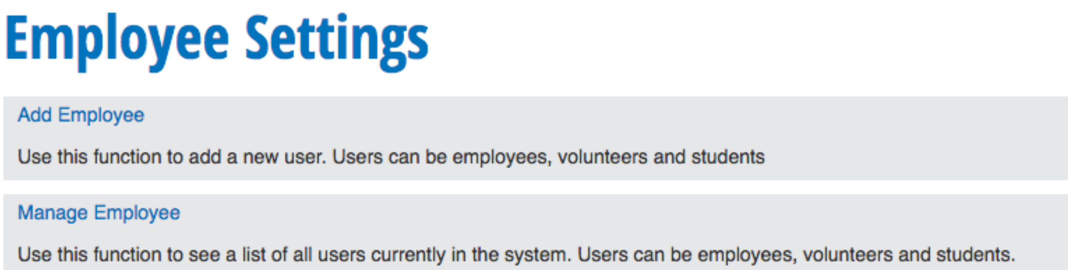
As an **Administrator** for your company; you are able to manage your employees in a number of ways. Starting with the ability to add new employees, edit existing ones and manage additional courses that don't fall into their standard training profile.

To add a new employee, we start off with accessing the **Admin** section via the **Admin** button at the top right side of your website. If you do not see this button, you may not have the proper administration privileges in the system.

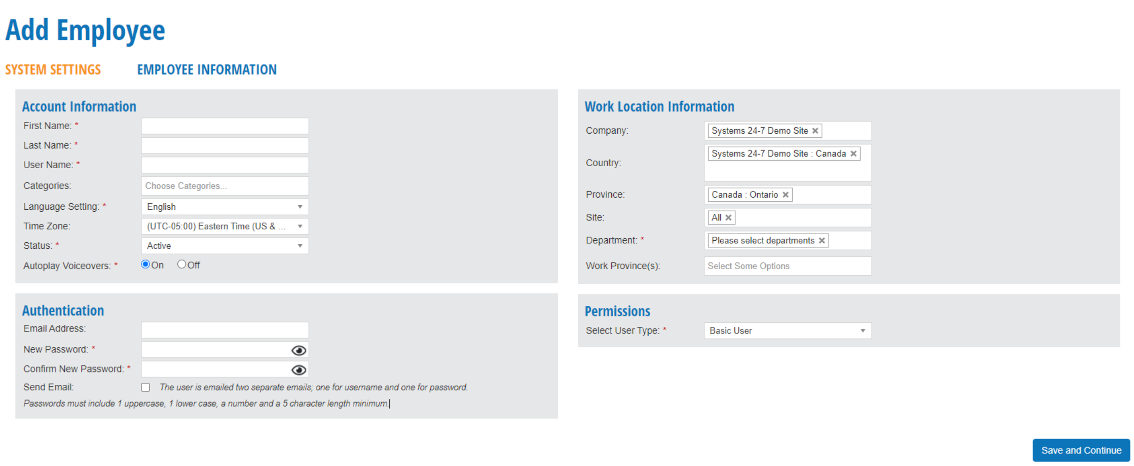


Once you are in the **Administration** section, click on **Employee Settings** to see the Employee Setting page.

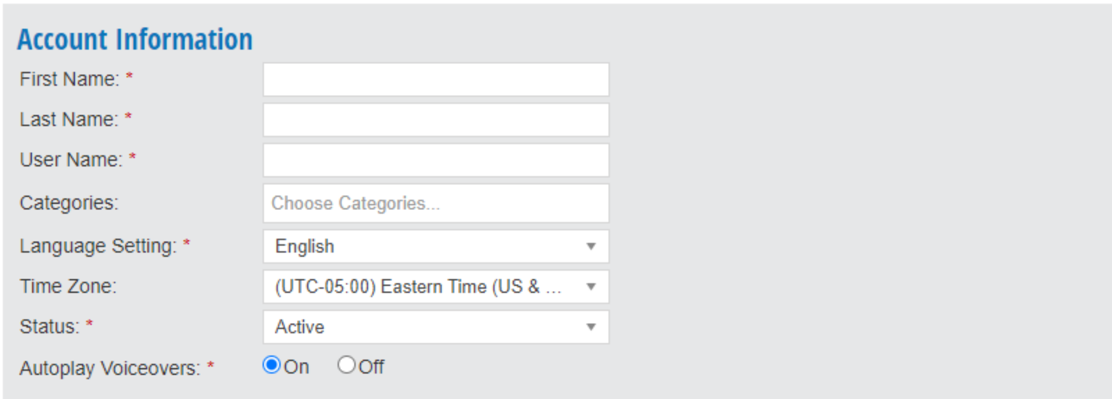


Add Employee

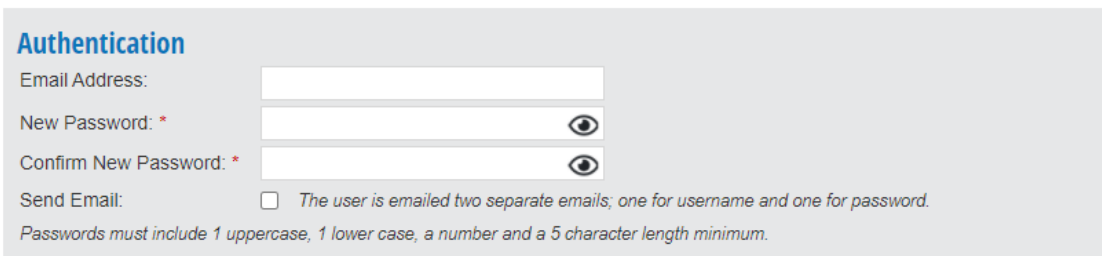
The **Add Employee** page is divided into two stages; **System Settings** and **Employee Information**. You will need to complete the **System Settings** section before moving on to **Employee Information**.



The **System Settings** stage allows you to set the user's account details, including their first and last name, login information, and work location. The first section to fill out under **System Settings** is **Account Information.**

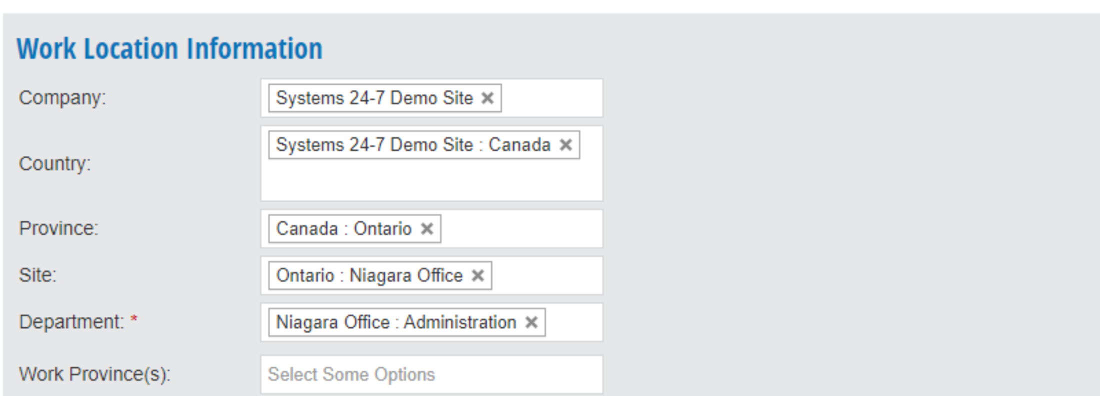


Fill out the employee's details, including their first and last name, preferred language, and time zone. Assign the user a username, select any **Categories** relating to the user, and choose the user's account status.

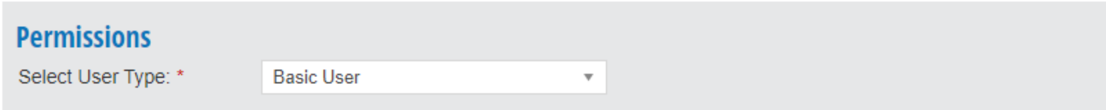


The **Authentication** section allows you to set a password for the user and enter their email address if applicable. There is an option to send the username and password to the user by email.

Each user has the ability to update their password using the Profile tab located in the top right corner of the site. Each password must include 1 uppercase and lowercase letter, a number, and be at least 5 characters long.



The **Work Location** section helps you choose where to locate the user's account. When setting up a new employee you will need to know where the user is located. This information is very important when it comes to pulling detailed reports for your company.

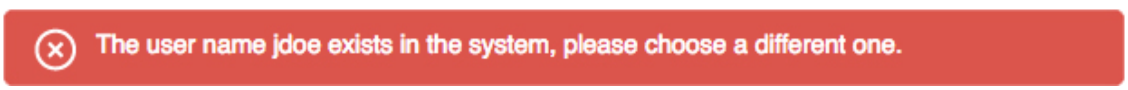


The **Permissions** section allows you to set the user's permissions by choosing a user type. A **Basic User** has no administrative permissions.

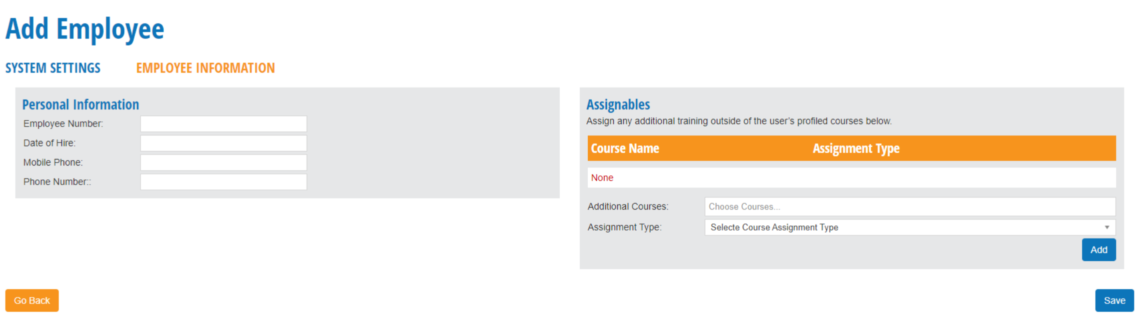
When you are ready to continue, click the **Save and Continue** button. You can return to this page later if you need to make any changes.

Once you click **Save and Continue**, the employee will be added. The page will prompt you with a green bar notifying you the employee has been successfully added to the system. You can proceed to the **Employee Information** stage, where you can add optional information for the employee.

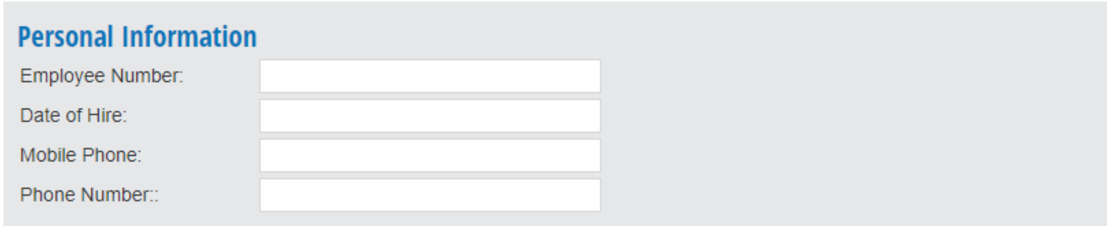
If you missed any mandatory fields or if you picked a username that has already been assigned to someone, the page will prompt you with a red bar notifying you of the information that is missing.



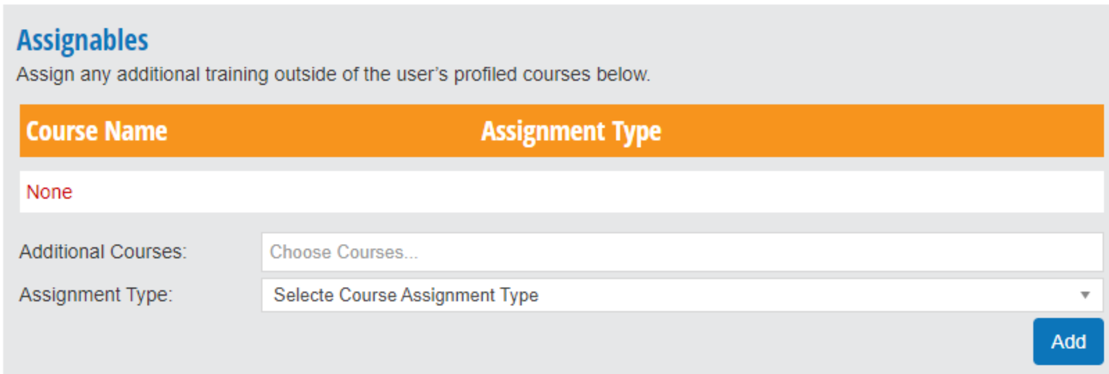
Once you have successfully moved on to the next stage, you can add the employee's personal information or assign any additional courses under the **Employee Information** section. You can click the **Go Back** button at any time to return to the **System Settings** stage.



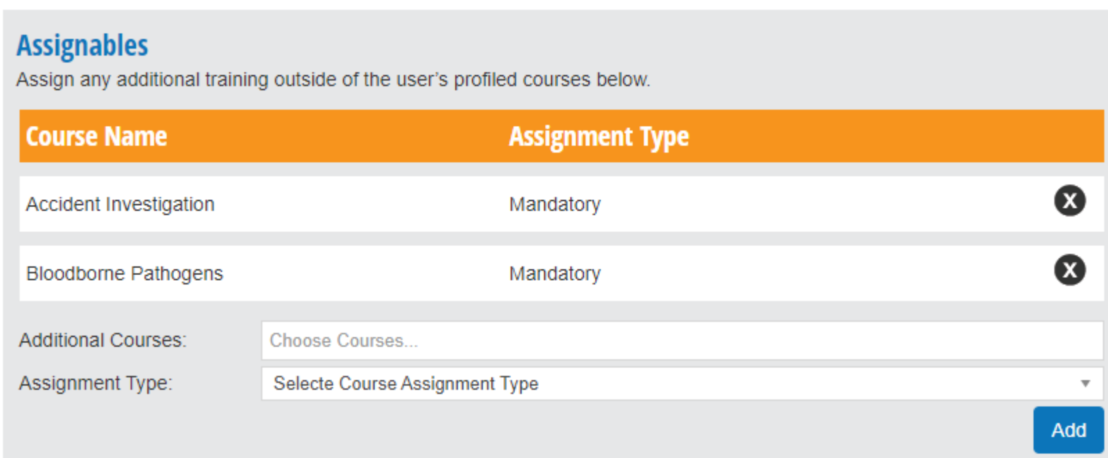
The first section to fill out under **Employee Information** is the **Personal Information** section. Here you can enter the user's employee number, hire date, and phone number information. These are all optional fields.



You can use the **Assignables** section to assign any additional training that you wish the employee to have. Any courses that are added here are assigned in addition to the courses that are assigned to the employee based on the company's training profiles.

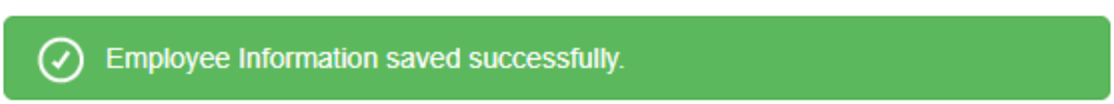


To assign courses to the user, select any desired courses in the **Additional Courses** field. Then choose a course assignment type in the **Assignment Type** field. By default, the available course assignment types are **Mandatory** and **Optional**. When you are finished, click **Add**. Courses that are assigned to the user will appear in the above table in the **Assignables** section.



To remove courses from this list, click the **Delete** button to the right of the course. Courses assigned here can be added or removed in the appropriate sections under **Manage Employee** and **Manage Additional Courses.**

Once you have completed this page, click **Save** to update the employee.

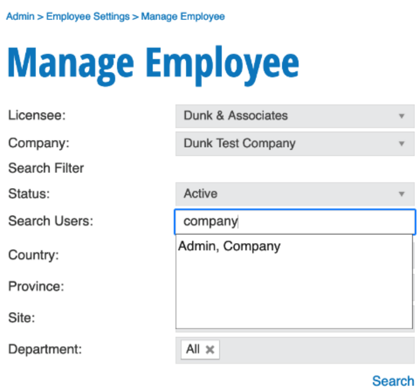


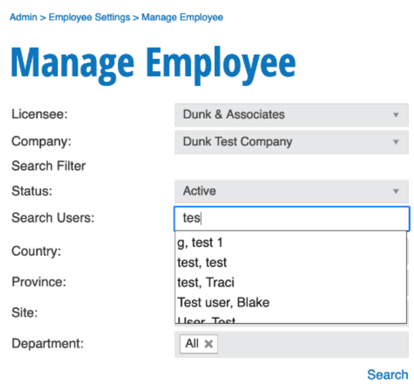
Manage Employee

This feature allows you to modify, activate/inactivate and delete employees from the system. This tool is essential in keeping your users current and up to date. Clicking on Manage Employee brings you to a search function and a defaulted list of all your active users.

First Name	Last Name	UserName	Email	Department	Status	Authoring Options
Test	Admin	testadmin1		Administration/Technology	Active	
Jane	Doe	jdoe247		Administration	Active	

You are able to search for a user by scrolling through the list, narrowing down the list using your **Company Structure** filters, or by using the **Search Users** field. You have two options to search for employees using the **Search Users** field.





Option 1: You can type in the employee's first name, last name or username into the **Search Users** field and we'll display employees that match your criteria in the dropdown. You can then quickly select them from the dropdown and it will open the user in the results.

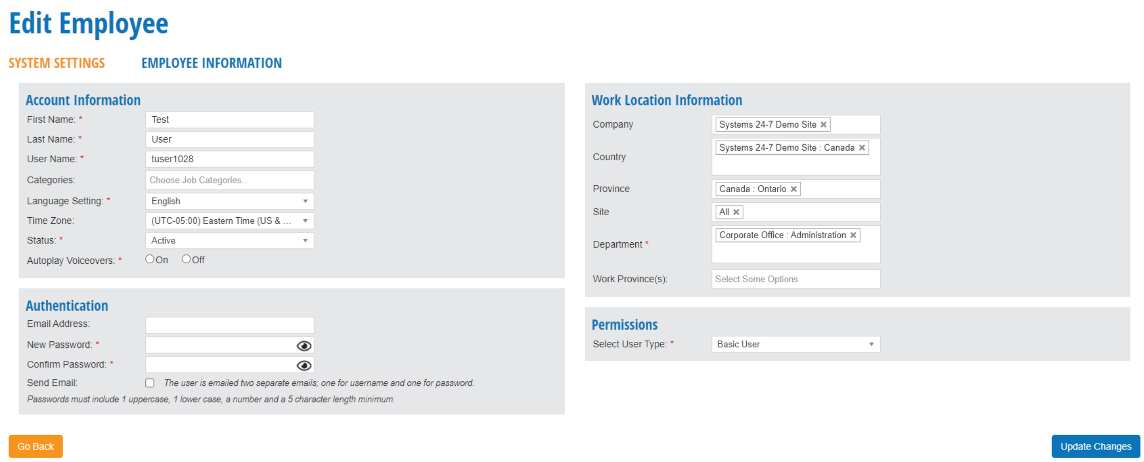
Option 2: You can search for employees with their partial names or usernames and then select the **Search** button. For example, you could type in "Sar" and then find all employees on your site with "Sar" in their first name, last name or username. In the displayed results, you can manually look for the employee you wish to update.

Once you have found the user you are looking for you have 3 authoring options to choose from. You can edit the employee's information, activate or inactive the user, or delete the user.

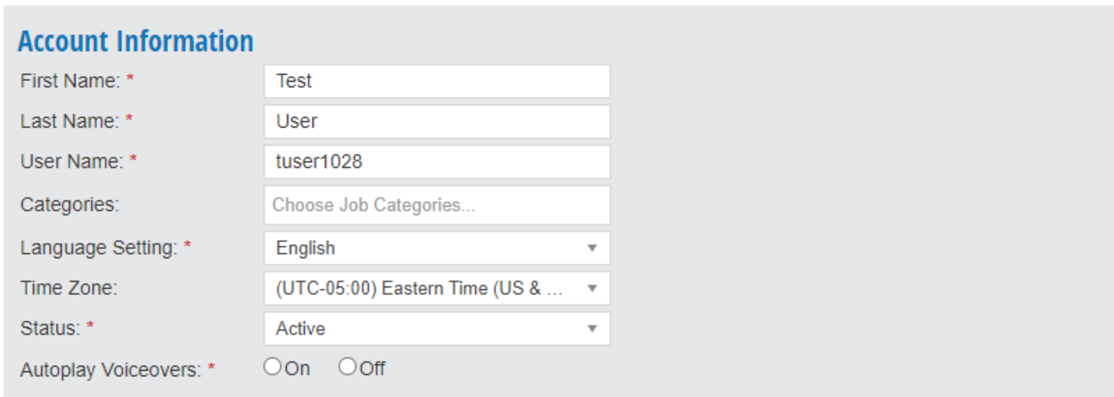
Editing A User

To edit an employee in the system, select the pencil icon under **Authoring Options**. This will redirect you to the **Manage Employee** page where you can edit all user information.

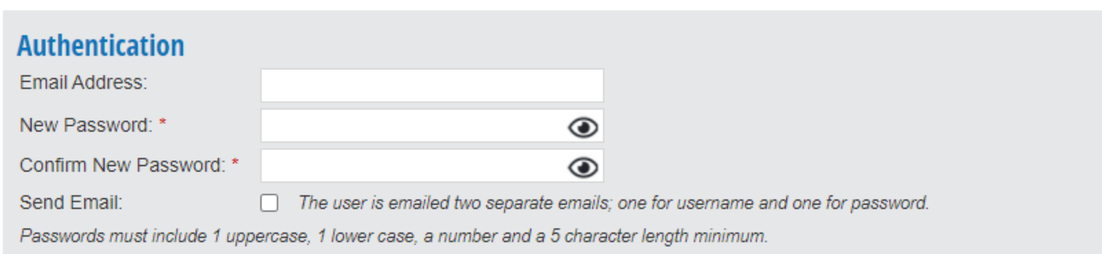
The **Edit Employee** page is divided into two stages; **System Settings** and **Employee Information**. You can move freely between the two stages by clicking on the **System Settings** or **Employee Information** subtitles.



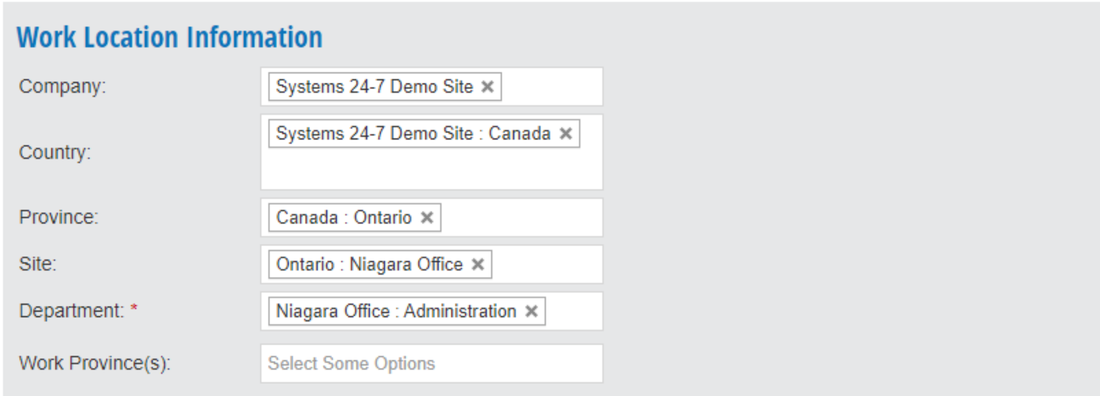
The **System Settings** stage allows you to update the user's account details, including their first and last name, login information, and work location. The first section under **System Settings** is **Account Information.**



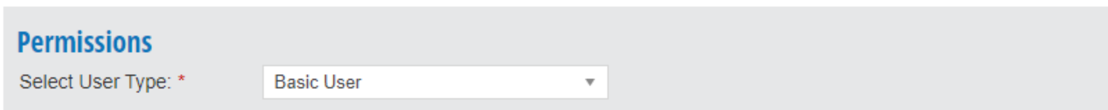
Under the **Account Information** section, you can make changes as needed to the user's first and last name, username, categories, preferred language, time zone, or status.



The **Authentication** section allows you to change the user's password or email address. Each password must include 1 uppercase and lowercase letter, a number, and be at least 5 characters long. There is an option to send the username and password to the user by email.



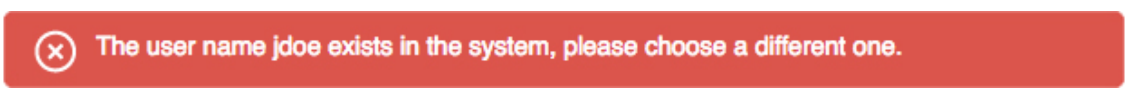
The **Work Location** section determines where the user's account is located. You can make changes to this field to move the user to a different department in the company.



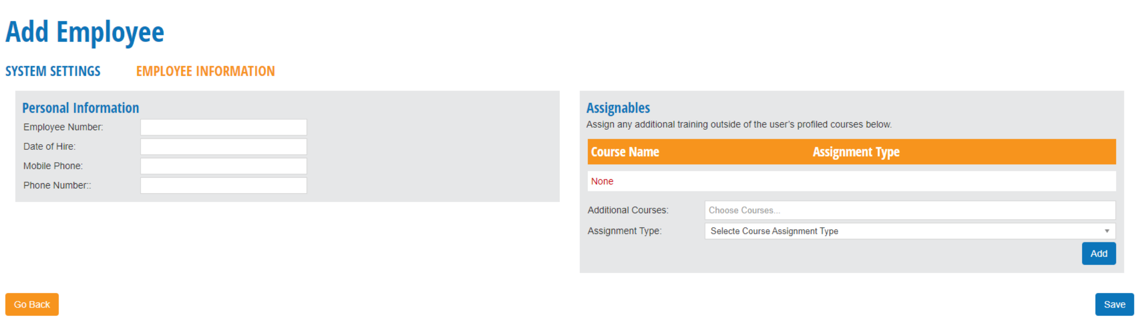
The **Permissions** section determines the user's permissions. You can make changes the the user's permission level here.

If you do not need to make any changes under **Employee Information**, you can save your changes now by clicking **Update Changes.** If you do need to continue, click the **Employee Information** subtitle at the top of the page. You can click **Go Back** at any time to return to the previous page.

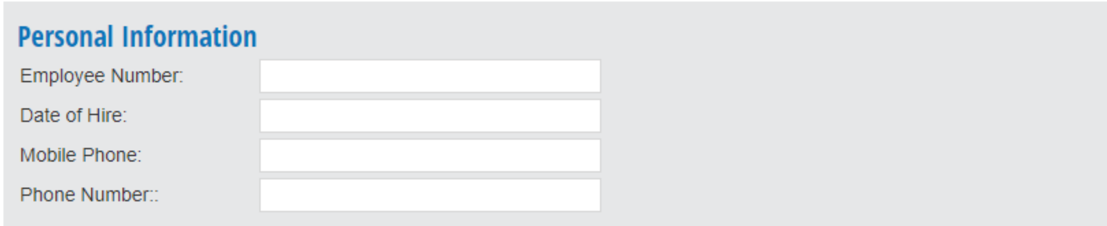
If you missed any mandatory fields or if you picked a username that has already been assigned to someone, the page will prompt you with a red bar notifying you of the information that is missing.



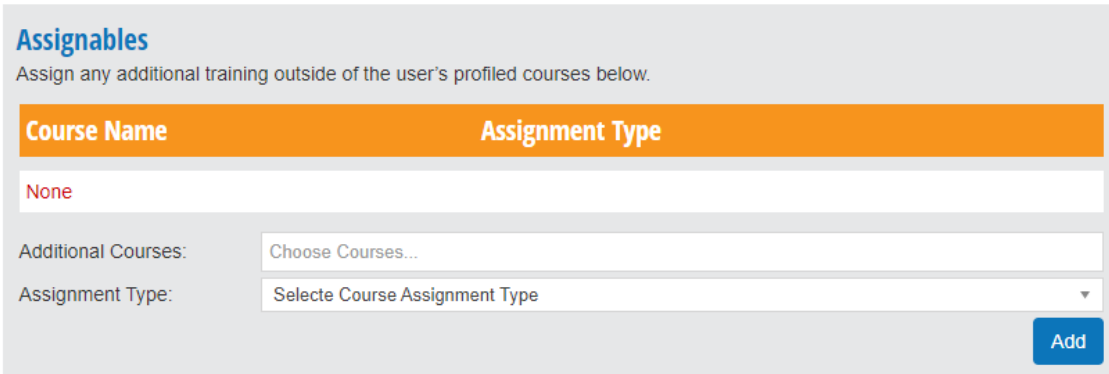
Once you have successfully moved on to the next stage, you can make updates to the employee's personal information or assign any additional courses under the **Employee Information** section. You can click the **Go Back** button at any time to return to the **System Settings** stage.



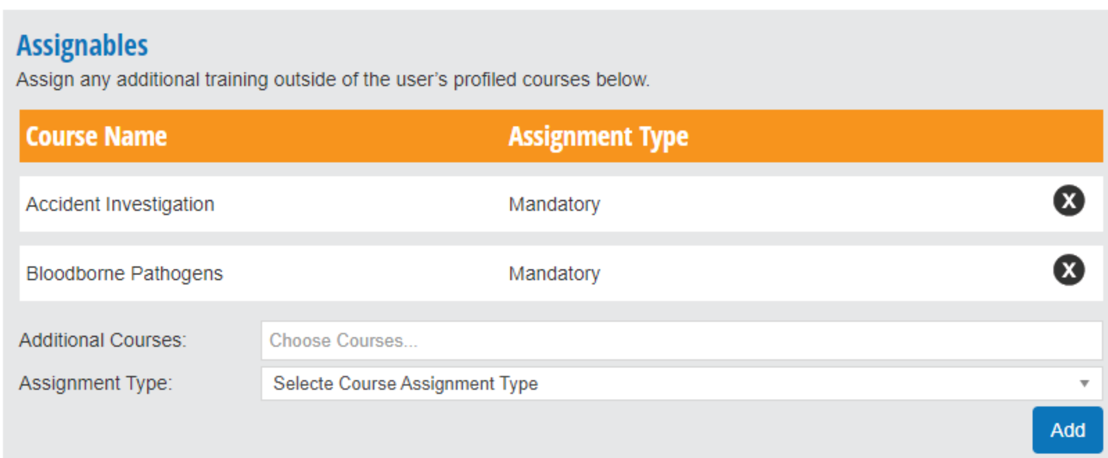
The first section under **Employee Information** is the **Personal Information** section. Here you can enter or update the user's employee number, hire date, and phone number information. These are all optional fields.



You can use the **Assignables** section to assign any additional training that you wish the employee to have. Any courses that are added here are assigned in addition to the courses that are assigned to the employee based on the company's training profiles.

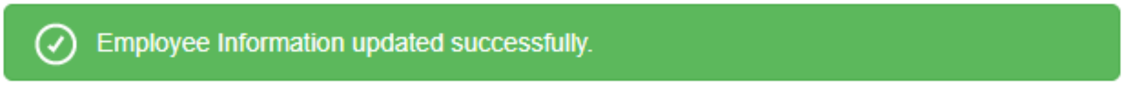


To assign courses to the user, select any desired courses in the **Additional Courses** field. Then choose a course assignment type in the **Assignment Type** field. By default, the available course assignment types are **Mandatory** and **Optional**. When you are finished, click **Add**. Courses that are assigned to the user will appear in the above table in the **Assignables** section.

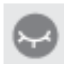


To remove courses from this list, click the **Delete** button to the right of the course. Courses assigned here can also be added or removed in the appropriate section under **Manage Additional Courses.**

Once you have completed all mandatory fields (fields with an *), click **Save** to add the employee. The page will prompt you with a green bar notifying you the employee has been successfully updated.



Activate or Inactivate a User

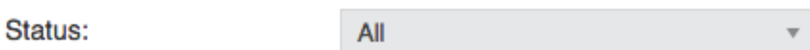

To activate a user in the system, click on the closed eye (grey) icon under **Authoring Options**.


To inactivate a user in the system, click on the open eye (blue) icon under **Authoring Options**.

A user can also be set to active or inactive on the **Edit Employee** page with the Status setting.

By inactivating a user, you are hiding the users account and denying them access. This is different from deleting a user because all of their information and training is still on the system and can still be pulled in reports.

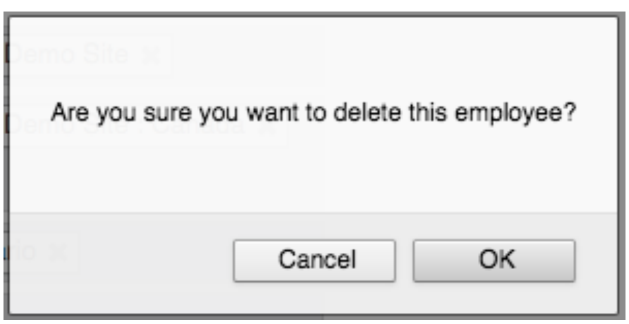
If you inactive a user and they disappear from your list, go to your filter options at the top of the page and change your Status from Active to All.



Delete A User


To permanently delete a user from the system, click on the X icon under **Authoring Options**.

After selecting the X icon, the system will prompt you to confirm your selection. Select **OK** to delete the employee or **Cancel** to stop the request.



Manage Additional Courses

When you want to assign courses to a specific user that is not mandatory in their training profile, this is the perfect place to do this. Clicking on **Manage Additional Courses** brings you to a user search field and a list of all active clients in your company.

Start by finding the user you wish to add courses to by scrolling through the list or typing in their name into the **Search Users** field and click **Search**.

Once you have found the employee you wish to add courses to you will notice 2 course columns: **Profiled Courses** and **Additional Courses**.

First Name	Last Name	Company	Service	Profiled Courses	Additional Courses
BasicUser	Demo	Systems 24-7 Demo Site	Environmental	Battery Storage and Disposal	
			Health & Safety	Back Care 220 - Retail Knife Safety WHMIS 2015 Worker Awareness Training	Back Care 220 - Retail
			Human Resources	AODA Full	

Profiled Courses are assigned to the user based off where they are in the company and what Categories have been assigned to them. These courses cannot be unassigned using this feature.

Additional Courses are any user specific courses that have been manually assigned.

To modify additional courses, we start off by clicking the **Pencil Icon** on the right-hand side of the page.

The page is broken into two sections. The first section tells you basic user information and any courses profiled to that user. The second section allows you to manage **Additional Courses**.

Company: Systems 24-7 Demo Site
First Name: BasicUser
Last Name: Demo
User Name: BasicUser

Profiled Courses	Assignment Type
AODA Full	Mandatory
Back Care 220 - Retail	Mandatory
Battery Storage and Disposal	Optional
Knife Safety	Optional
WHMIS 2015	Mandatory
Worker Awareness Training	Mandatory

Course Name	Assignment Type	Options
Back Care 220 - Retail	Mandatory	

To Add Additional Courses

To add courses to the user, click in the **Additional Courses** field, located at the bottom of the page, where it says **Choose Courses**. Select the course you wish to add to the user from the dropdown list. Then select the assignment type. Select **Update** to apply your additional courses.

Additional Courses: Choose Courses...
Assignment Type: * Select Course Assignment Type

You will be redirected back to the **Manage Additional Courses** page and you can see the courses added under the **Additional Courses** column.

First Name	Last Name	Company	Service	Profiled Courses	Additional Courses
John	Doe	Systems 24-7 Demo Site	Health & Safety	WHMIS 2015	Test Course EN

To Remove Additional Courses

You can remove any additional courses from the user's list by clicking the **X** button next to the course title. When you are finished, click **Update** to save your changes.

Add Course Scores

This function is for adding completed course scores for training that has been taken in classroom or offline to be properly tracked. To add scores to your user, start by searching for the user by name and clicking on them in your active user list.

Search Users: Doe , Jane

Once the user has been chosen, you will need to click the check box in the first column to activate the course drop down list. Next, choose the course you want to add the score for, enter in the score percentage and the date they completed the course.

Course	Score	Date
1. Healthy Eating on the Job	100	July 12, 2018

You can add up to 5 scores at a time. Once you have made all your course selections and added in the score and date, select **Add Scores** to apply the changes. The system will notify you that your scores have been added.

Score has been added for course 1 (Healthy Eating on the Job).

Add Module Scores

In some cases, courses have more than 1 module, for example Worker Awareness Training has 3 modules. This function is for adding completed scores to modules for training that has been taken offline to be properly tracked. If you are looking to upload a course score, please refer to the above section and follow the proper steps.

To add module scores to your user, start by searching for the user by name and clicking on them in your active user list. Next, select the course from the dropdown to access the modules within.

Employee: Doe , Jane

Course: Worker Awareness Training

Once you select the course, you will be able to access a list of modules within the selected course. Similar to Course Scores, select the check box in the first column to activate the module drop down list. Next, choose the module you want to add the score for, enter in the score percentage and the date they completed the module.

	Module	Score	Score Date
☑	Module 1: Introduction to Health and Safety	100	July 3, 2018
☑	Module 2: Workplace Hazards	100	July 12, 2018
☑	Module 3: Working Together for Safety	100	July 18, 2018

Once you have made all your module selections and added in the score and date, select **Save** to apply the changes. The system will notify you that your scores have been added.

Score has been added for module Module 1: Introduction to Health and Safety.
Score has been added for module Module 2: Workplace Hazards.
Score has been added for module Module 3: Working Together for Safety.

Assign Resource

The assign resource function allows you to view a user's assigned resources, such as policies and procedures, and add or remove additional resources the user has access to view.

As soon as you access the **Assign Resource to Employee** page you will see a list of employees and the resources assigned to each user. Start by finding the user you wish to add resources to by scrolling through the list or typing in their name into the **Search Users** field and click **Search**.

Once you have found the employee you wish to add resources to you will notice 2 resource columns: **Profiled Resources** and **Assigned Resources**.

Search Users:

Search

First Name	Last Name	UserName	Feature	Service	Header Name	Profiled Resources	Assigned Resources
Test	User	testuser1	Policies	Health & Safety	Section 01 - Policy	1. Health and Safety Policy Statement	

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Profiled Resources are assigned to the user based off where they are in the company and what Categories have been assigned to them. These resources cannot be unassigned using this feature.

Assigned Resources are any user specific resources that have been manually assigned.

To modify assigned resources, we start off by clicking the **Pencil Icon** on the right-hand side of the page.

The page is broken into three sections, the first section provides **Resource Filters** to help narrow down your search. For example, select **Human Resources** from the **Service** field to see only HR related resources.

Service: Human Resources ×

The second section displays which **Assigned Resources** are currently assigned to the employee. This is for viewing purposes only and these resources cannot be managed from here.

Company:	Systems 24-7 Demo Site
Employee:	Test User
Assigned Resources:	**Profiled Library File Name**
	Health and Safety Policy Statement

Lastly, the third section allows you to manage **Additional Resources** assigned to this specific employee. To add a resource to the user, click in the **Additional Resources** field where it says **Choose Resources**. Select the resource you wish to add to the user from the dropdown list and then click **Update** to save your changes.

Additional Resources:	Workplace Violence and Abuse Policy ×

To remove an additional resource from the user, simply click the X in the top right corner of the resource followed by **Update** to save your changes.

You will be redirected back to the **Assign Resource to Employee** page and you can see the resource has been added (or removed) from the **Assigned Resources** column.

Test	User	testuser1	Policies	Health & Safety	Section 01 - Policy	1. Health and Safety Policy Statement	1. Workplace Violence and Abuse Policy

Add Resource View

If a resource, such as a policy or procedure, has been reviewed with a user in person you can use this function to manually add a record to the user's profile showing the resource has been viewed.

To mark a resource as viewed by a user, start by searching for the user by name and clicking on them in your active user list.

Search Users:	Doe , Jane

Once the user has been chosen, you will need to click the check box in the first column to activate the resource drop down list. Next, choose the resource you want to mark as viewed and insert the date the employee reviewed it.

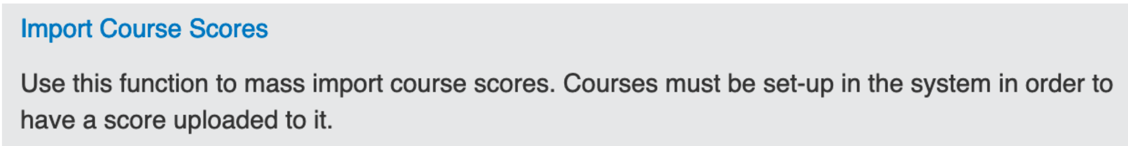
Resources	Date
☑ 1. Health and Safety Policy Statement	July 12, 2018

Once you have made all your resource selections and added the date they were reviewed, select **Add Views** to save your changes. The system will notify you that your resource views have been added.

Resource view and sign-off has been added for resource 1 (Health and Safety Policy Statement).

Import Course Scores

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Course Scores** function.



This page provides a template to download so that it is easy to upload your results to the system, but the course must already be on Systems 24-7 in order to complete the import. This is a quicker solution when more than 10 employees need course scores added for courses completed offline.

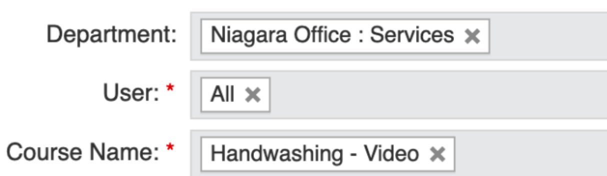
Refer to the **Course Settings – Administration User Guide** for step-by-step instructions on how to add a course to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **"Click to expand the available export files"** dropdown menu.

Step 2: Make your selections from the filters using the available dropdown menus.

In our example we are importing completion dates and course scores for all users within a department for a Handwashing – Video course.



Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date and score for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E	F
1	First Name	Last Name	Username	Course Title	Date Completed	Score
2	Site	Admin	sadmin1	Handwashing - Video	01/22/2021	100
3	Test	User 3	tuser3	Handwashing - Video	01/22/201	100

Step 4: On the **Import Course Scores** page, choose whether or not you want to **Allow Duplicate Scores** and/or **Auto Assign Course to Employee**.

Allow Duplicate Scores: This means if the user already has a record in the system, you will allow another record to replace it.

Auto Assign Course to Employee: This means if the employee has not been assigned this course, by importing the score you will assign it to their list of training.

Step 5: Select the **Date Format** to match your completion date entry.

Date Format in Template: MM/DD/YYYY

Step 6: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.

Import File: * Browse... No file selected.

The system will prompt you to confirm you would like to import employee scores for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Score import complete. 0 courses assigned to users. 1 scores added to the system. 2 records processed.

The system will inform you of how many courses were assigned to users, how many scores were added to the system and how many entries were processed.

In the event there was an error with one of your entries, you can download a file for the “non-inserted” entries so that you can correct the errors.

Download non-inserted file: ImportCourseScores_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 through 6.

Import Library View/Sign-Off

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Library View/Sign-Off** function.

Import Library File View/Signoff

Use this option to import “views” and sign-offs to a resource in any library.

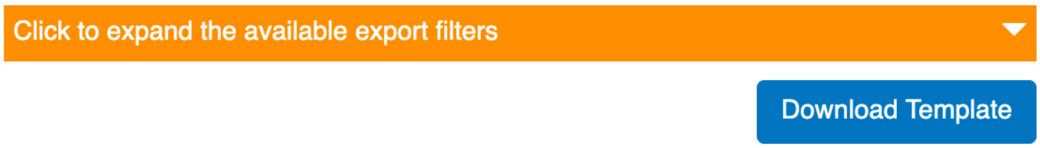
This page provides a template to download so that it is easy to upload your results to the system, but the library file must already be on Systems 24-7 in order to complete the import. **It’s important to note, if there is a sign-off requirement turned on for a library file, the sign-off**

will also be uploaded. This is a quicker solution when more than 10 employees need records added due to reviewing a policy in-person with a group of employees.

> Refer to the **Library Settings – Administration User Guide** for step-by-step instructions on how to add a resource to the system.

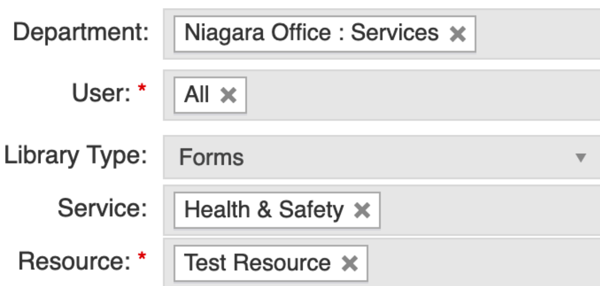
This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **"Click to expand the available export files"** dropdown menu.



Step 2: Make your selections from the filters using the available dropdown menus.

In our example we are importing completion dates for all users within a department for a specific Health & Safety Form.



Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E	F
1	First Name	Last Name	Username	Library Header	Resource Name	Date Completed
2	Site	Admin	sadmin1	Test Header	Test Resource	01/22/2021
3	Traci	test	tracitest	Test Header	Test Resource	01/22/2021

Step 4: On the **Import Library View/Signoff** page, you will need to select the **Library Type** and **Service** you used in your spreadsheet.

Library Type: * Forms

Service: Health & Safety ✖

Step 5: Select the **Date Format** to match your completion date entry.

Date Format: * MM/DD/YYYY

Step 6: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.

Import File: * Browse... No file selected.

The system will prompt you to confirm you would like to import a library view/signoff for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Library File View/Signoff import complete. 2 resource views added. 3 records processed.

The system will inform you of how many records were added and how many were processed.

In the event there was an error with one of your entries, you can download a file for the “non-inserted” entries so that you can correct the errors.

Download non-inserted file: ImportLibraryFileView_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 through 6.

Import Monthly Talk Completion

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Monthly Talk Completion** function.

Import Monthly Talk Completion

Use this option to import a completion record for quiz questions on a monthly talk.

This page provides a template to download so that it is easy to upload your results to the system, but the monthly talk must already be on Systems 24-7 in order to complete the import. **It’s important to note, you are adding a record of the employee completing the monthly talk, not a record of their quiz responses or a physical sign-off.** This is a quicker solution when more than 10 employees need records added due to reviewing a monthly talk in-person with a group of employees.

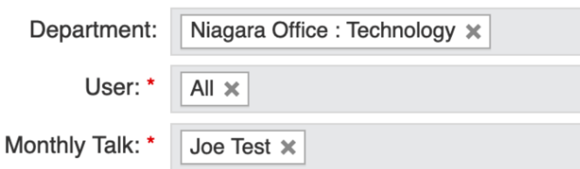
Refer to the **Monthly Talk – Administration User Guide** for step-by-step instructions on how to add a monthly talk to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **"Click to expand the available export files"** dropdown menu.

Step 2: Make your selections from the filters using the available dropdown menus.

In our example we are importing completion dates for all users within a department for a specific monthly talk.



Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

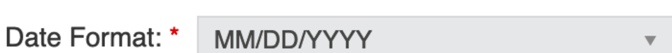
For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date for each user. For the **Date Completed** column, enter the date in one of the following formats:

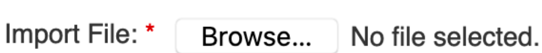
- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E
1	First Name	Last Name	Username	Monthly Talk	Date Completed
2	Basic	User 1	buser1	Joe Test	01/22/2021
3	Basic	User 2	buser2	Joe Test	01/22/2021

Step 4: On the **Import Monthly Talk Completion** page, you will need to select the **Date Format** you used in your spreadsheet.



Step 5: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.



The system will prompt you to confirm you would like to import a monthly talk completion for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Monthly Talk Completion import complete. 1 records added. 1 records processed.

The system will inform you of how many records were added and how many were processed.

In the event there was an error with one of your entries, you can download a file for the "non-inserted" entries so that you can correct the errors.

Download non-inserted file: ImportMonthlyTalkCompletionList_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 and 5.

Import Survey Completion

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Survey Completion** function.

Import Survey Completion

Use this option to import a completion record to a survey.

This page provides a template to download so that it is easy to upload your results to the system, but the survey must already be on Systems 24-7 in order to complete the import. **It's important to note, you are adding a record of the employee completing the survey, not a record of their survey responses.**

Refer to the **Survey – Administration User Guide** for step-by-step instructions on how to add a survey to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **"Click to expand the available export files"** dropdown menu.

Click to expand the available export filters

Download Template

Step 2: Make your selections from the filters using the available dropdown menus. Here are some examples to get you started:

- You may want to create a template for all users within a specific department. To do this, leave **Users** to "All" and select the **Department** you wish to use.
- You may want to create a template that includes all users but for a specific survey. In this case, leave **Users** to "All" and select the **Survey** you wish to mark as completed.

Country: Dunk Test Company : Canada

Province: All

Site: All

Department: All

User: * All

Survey: * Test Survey

Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E
1	First Name	Last Name	Username	Survey	Date Completed
2	Test	User 1	tuser1	Test Survey	01/22/2021
3	Test	User 2	tuser2	Test Survey	01/22/2022

Step 4: On the **Import Survey Completion** page, you will need to select the **Date Format** you used in your spreadsheet.

Date Format: * MM/DD/YYYY

Step 5: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.

Import File: * Browse... No file selected.

The system will prompt you to confirm you would like to import a survey completion for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Survey Completion import complete. 1 records added. 5 records processed.

The system will inform you of how many records were added and how many were processed.

In our example, 4 of our entries were not recorded. In the event this happens to you, you can download a file for the “non-inserted” entries so that you can correct the errors.

Download non-inserted file: ImportSurveyCompletionList_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 and 5.

Add Monthly Talk View/Sign-Off

If a monthly talk has been reviewed with a user in person you can use this function to manually add a record to the user's profile showing the monthly talk has been viewed/signed-off.

To mark a monthly talk as viewed/signed-off by a user, start by searching for the user by name and clicking on them in your active user list.

Search Users: Doe , Jane

Once the user has been chosen, you will need to click the check box in the first column to activate the monthly talk drop down list. Next, choose the monthly talk you want to mark as viewed/signed-off and insert the date the employee reviewed it.

Monthly Talk	Date
1. WHMIS Annual Review Safety Talk	July 12, 2018

Once you have made all your monthly talk selections and added the date they were reviewed, select **Add Completions/Sign-Offs** to save your changes. The system will notify you that your monthly talk completions have been added.

Monthly Talk completion and sign-off has been added for Monthly Talk 1 (WHMIS Annual Review Safety Talk).

View Contractor/Sub-Contractor User List

This section is relevant to administrators who are using the Preventative Maintenance feature. If you do not have access to this feature, you will not have access to this function.

To view information for existing Contractors/Sub-Contractors you can use this list. You can use the **Contractor/Sub-Contractor** search filter to filter the users by their contractor/sub-contractor company. By default, the system will show you all users. Once you have changed your search filters, click the "Search" button to perform the search.

Contractor/Sub-Contractor User List

Back to Employee Settings

Contractor/Sub-Contractor: All

Search

20 1-6/1 1/1

Contractor/Sub-Contractor	Company Type	First Name	Last Name	Email	Contractor Options
New Contractor Co	Contractor	Contractor	Admin 2	technicalsupport@systems24-7.com	Edit Status Delete
Contractors Inc	Contractor	Contractor	Admin	technicalsupport@systems24-7.com	Edit Status Delete

You can change the number of user entries per page by changing the number at the top left of the user list. By default, the system displays 20 users per page. At the top right of the equipment list, you have several other options:

The arrow buttons allow you to navigate through the pages of the list.

 This is the Print button. Click this button to print the equipment list.

 This is the Save button. Click this button to export the equipment list into an Excel file.

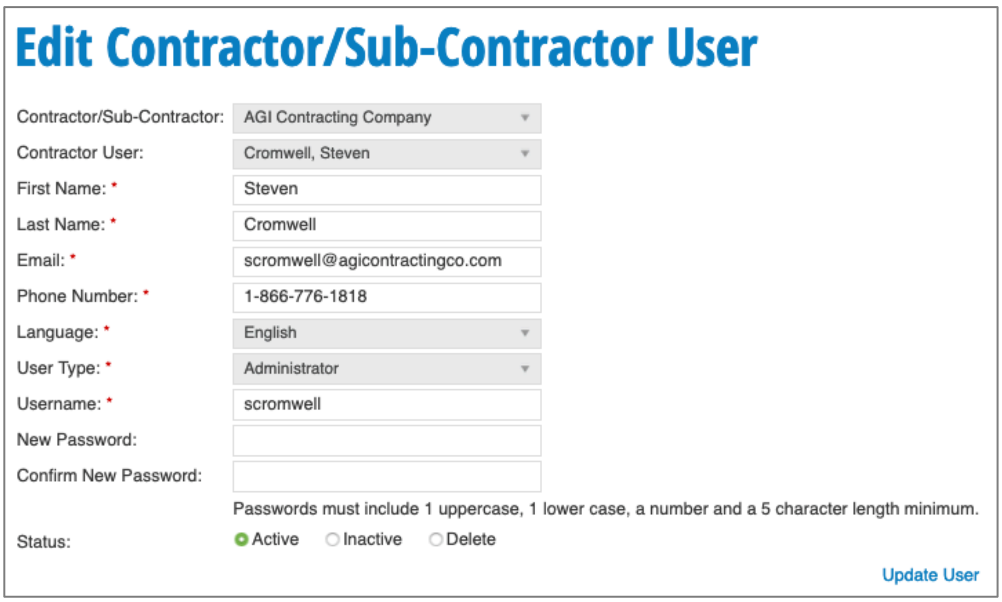
There are a number of admin options for each user so let's go over each icon located in the **Contractor Options** column.

 This is the **Edit** icon. It allows you to edit the equipment details and information entered when you originally added the equipment.

 This is the **Status** icon. It allows you to activate or deactivate users.

 This is the **Delete** icon. It allows you to permanently delete users from the system and the information cannot come back.

To edit a user, find the user you wish to edit and select the **Edit** icon. Make any necessary changes and then click **Update User** to save the changes.



Edit Contractor/Sub-Contractor User

Contractor/Sub-Contractor:	AGI Contracting Company
Contractor User:	Cromwell, Steven
First Name: *	Steven
Last Name: *	Cromwell
Email: *	scromwell@agicontractingco.com
Phone Number: *	1-866-776-1818
Language: *	English
User Type: *	Administrator
Username: *	scromwell
New Password:	
Confirm New Password:	
	Passwords must include 1 uppercase, 1 lower case, a number and a 5 character length minimum.
Status:	Active Inactive Delete

Update User

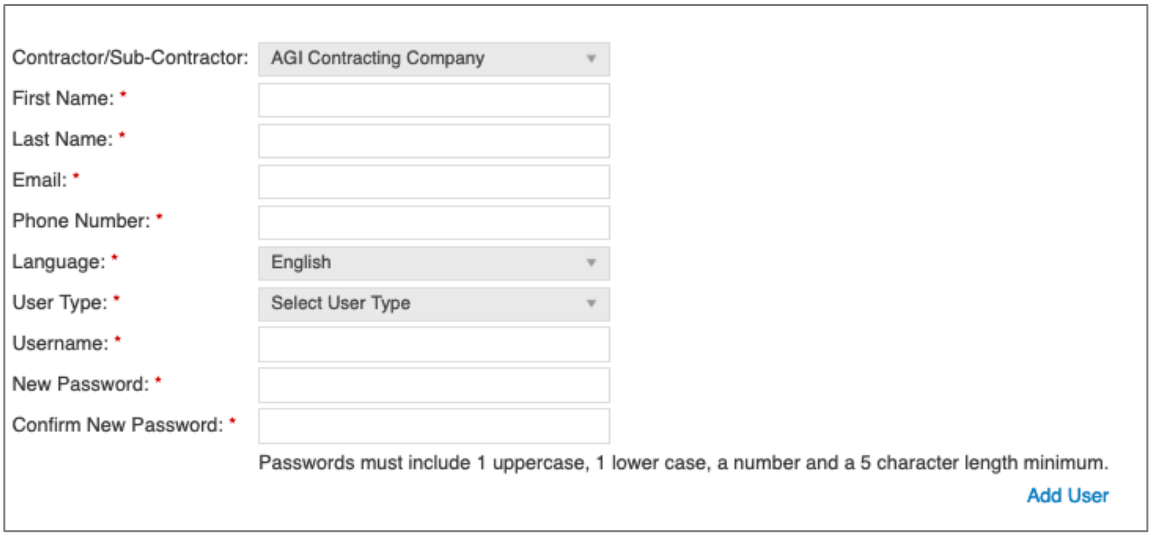
You will be notified by the system that the changes were updated successfully.

Add Contractor/Sub-Contractor User

This section is relevant to administrators who are using the Preventative Maintenance feature. If you do not have access to this feature, you will not have access to this function.

Start off by selecting the Contractor/Sub-Contractor company you would like to add users to from the **Contractor/Sub-Contractor** dropdown list.

Then fill out the user information fields that appear. Fields marked with an asterisk are required.



First Name: Enter the first name of the user.

Last Name: Enter the last name of the user.

Email: Enter the user's email address.

Phone Number: Enter the user's phone number.

Language: Choose the default language for the user.

User Type: Select whether the user will be a Basic User or an Administrator for the company.

Username: Enter a username for the user.

New Password: Enter a password for the user. Passwords must include 1 uppercase, 1 lower case, a number and a 5-character length minimum.

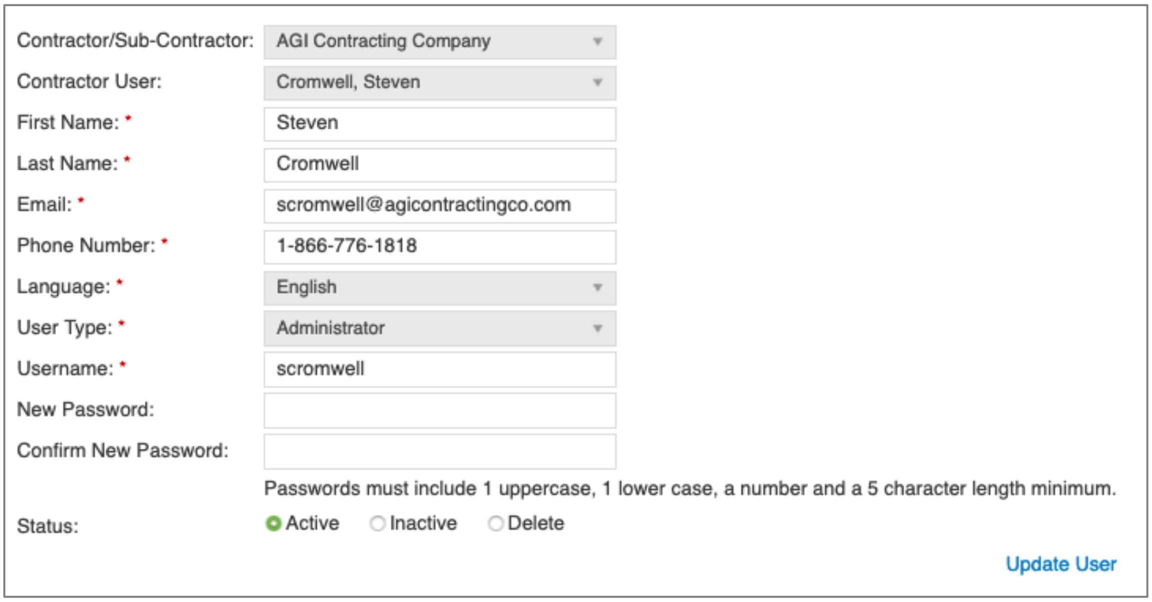
Confirm New Password: Enter the same password that you entered in the **New Password** field.

Click "Add User" to enter this user into the system. The system will pop-up box confirming that you would like to add the user into the system. Click "Yes" to add the user. The system will prompt you to notify the user by email if you wish. To send the user their username and password in separate emails, click "Yes".

Edit Contractor/Sub-Contractor User

This section is relevant to administrators who are using the Preventative Maintenance feature. If you do not have access to this feature, you will not have access to this function.

Start off by selecting the Contractor/Sub-Contractor company you would like to edit from the **Contractor/Sub-Contractor** dropdown list then select the user you would like to edit from this dropdown list. The user's information will populate.



On this page, you can update any of the user's information. You can also activate, deactivate, or delete the user by changing the Status of the user. Make any necessary changes and then click **Update User** to save the changes. You will be notified by the system that the changes were updated successfully.