

USER GUIDE

# Profiling Training

## Administration User Guide

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## Profiling Training

So, you've finished developing your online training on Systems 24-7 or you're ready to assign one of our courses? That's great!

Before you get started on assigning the training, we recommend that you think about how you want to assign it. On Systems 24-7, you can assign training in a variety of ways; based on your company levels (also known as organizational structure), categories, administration level, or other combination of ways!

**Here are some profiling scenarios:**

- Decanting is a **generic** course, this means it can be taken by anyone regardless of province. However, you only need certain groups in your organization to complete the training. Only your cleaners with the category CUSTODIAN and your service technicians with the category SERVTECH are required to complete this course. Therefore, this course only needs to be profiled by **category**.
- Accident Investigation is a **provincially-specific** course. You only require your managers and safety committee members at each specific location to complete the training. In this scenario, this course needs to be profiled by **Company Level and Category**.
- Kitchen safety is a **generic** course. It is only required to be completed by those working in your kitchen department. Therefore, this course needs to be profiled by **Company Level**.
- Effective Leadership, a **generic** course designed for anyone in a leadership role, is required to be taken by all your administrators. Therefore, this course needs to be profiled by **Admin Level**.

## How to Profile Training

**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 (which we will review in section 2 of this guide) is

where you can view how training is already assigned. To profile training, select how you wish to assign your training from the assignment options available.

Admin > Configuration Settings > Edit Company Training Profile

## Edit Company Training Profile

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

Map Course to: ☒ Company Level ☐ Category ☐ Company Level and Category ☐ Admin Level ☐ Specific Users

Select level to map: Department

Select name(s): Choose Names...

Select course(s): Choose Courses...

Assignment Type: Select Assignment Type

Apply to new hire only: ☐

Complete By: ☐

This is where you can assign/profile training from the options available.

### Training Profiled

Display Profile By: ☒ Course ☐ Company Level ☐ Category ☐ Admin Level ☐ Specific User

Select Courses: All

This is where you can view how training is already profiled and make changes.

## Assigning Training by Company Level

**Step 1:** To assign training by **Company Level**, select the option and the level you want to map. This is based on your company structure. For example, assign to a specific department, location or site.

Map Course to: ☒ Company Level ☐ Category ☐ Company Level and Category ☐ Admin Level

Select level to map: Department

Select name(s): Company

Select course(s): Country

Assignment Type: Province

Apply to new hire only: Site

Complete By: Department

### Training Profiled

Display Profile By: ☒ Course ☐ Company Level ☐ Category ☐ Admin Level

Select Courses: All

**Step 2:** Once the level is selected, select the name.

Map Course to: ☒ Company Level ☐ Category ☐ Comp:

Select level to map: Department

Select name(s): Bobcaygeon Office : Administration

Select course(s): Bobcaygeon Office : Support Centre

Assignment Type: Edmonton Office : Maintenance

Apply to new hire only: Niagara Office : Services

Complete By: Niagara Office : Technology

### Training Profiled

Display Profile By: ☒ Course ☐ Company Level ☐ Categor

Select Courses: All

**Step 3:** Select the names of the courses you wish to profile.

Select level to map: Department

Select name(s): Bobcaygeon Office : Administration x

Select course(s): AODA Full x

**Step 4:** Select the course assignment type. For example, mandatory or optional. This will tell the user on their training page what your expectations are in taking the training, and also allows your administrators to filter down the type of assignment in your training reports. If you need to add more assignment types, refer to the configuration settings user guide.

Select level to map: Department

Select name(s): Bobcaygeon Office : Administration x

Select course(s): AODA Full x

Assignment Type: Mandatory

Apply to new hire only: ☐

Complete By: ☐

**Step 5:** Select whether the course is to be completed by only new hires. If selected, a New Hire Date and calendar will appear allowing a date to be selected. This profile will now only be applied to employees hired on or after this date according to their start date information.

Apply to new hire only: ☒

New Hire Date:

Complete By:

**Training Profiled**

Display Profile By:

Select Courses:

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

**Step 6:** Do you want users to have a specific date they need to complete the assigned training by? If so select off the complete by requirement.

**Fixed Date:** Choose the specific date that the assigned training should be completed by.

**Fixed Yearly Date:** Choose the month and day that training should be completed by and how many years the date will recur for. E.g. July 1st, every year for the next five years.

**Within Time Frame:** Choose how many days, weeks, months or years the user has to complete training and whether the time frame starts from the date of hire, date of assignment, or from the time the course is started.

Complete By: ☒

Within Time Frame

Within Date of Hire

14 Day

**Step 7:** When complete, select the **save** button in the lower right corner to save your profile and assign your training.

## Assigning Training by Category

**Step 1:** To assign training by **Category**, select the category you want to map to. This is based on your categories in the system. These might be positions, payroll codes, job codes, etc. You can select as many as you need.

Map Course to: ☐ Company Level ☒ Category ☐ Comp:

Job Category:

Select course(s):

Assignment Type:

Apply to new hire only: ☐

Complete By: ☐

### Training Profiled

**Step 2:** Select the name of the course(s) you wish to profile.

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

Map Course to: ☐ Company Level ☒ Category ☐ Company Level and Category ☐ Admin Level

Job Category:

Select course(s):

**Step 3:** Select the course assignment type. For example, mandatory or optional. This will tell the user on their training page what your expectations are in taking the training, and also allows your administrators to filter down the type of assignment in your training reports. If you need to add more assignment types, refer to the configuration settings user guide.

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

Map Course to: ☐ Company Level ☒ Category ☐ Company Level and Category ☐ Admin Level

Job Category:

Select course(s):

Assignment Type:

Apply to new hire only: ☐

Complete By: ☐

**Step 4:** Select whether the course is to be completed by only new hires. If selected, a New Hire Date and calendar will appear allowing a date to be selected. This profile will now only be applied to employees hired on or after this date according to their start date information.

Apply to new hire only: ☒

New Hire Date:

Complete By:

**Training Profiled**

Display Profile By:

Select Courses:

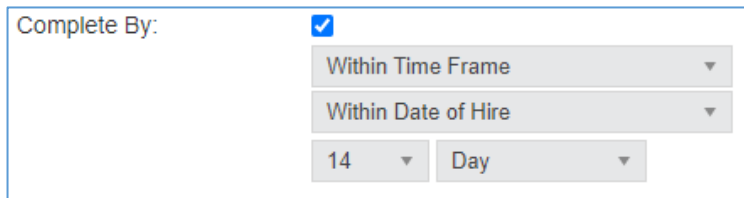
Su	Mo	Tu	We	Th	Fr	Sa
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8	9	10	11	12	13	14
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**Step 5:** Do you want users to have a specific date they need to complete the assigned training by? If so select off the complete by requirement.

**Fixed Date:** Choose the specific date that the assigned training should be completed by.

**Fixed Yearly Date:** Choose the month and day that training should be completed by and how many years the date will recur for. E.g. July 1st, every year for the next five years.

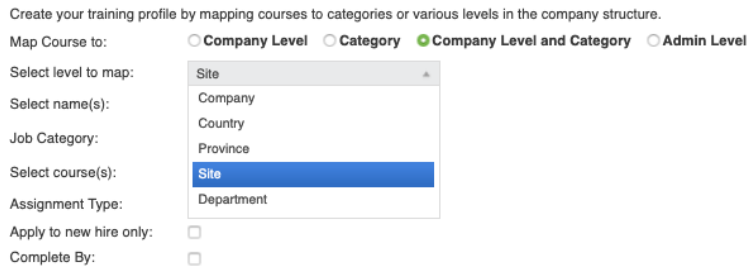
**Within Time Frame:** Choose how many days, weeks, months or years the user has to complete training and whether the time frame starts from the date of hire, date of assignment, or from the time the course is started.



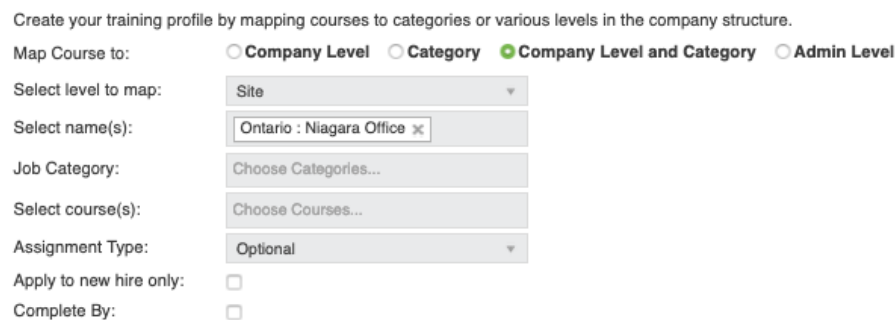
**Step 6:** When complete, select the **save** button in the lower right corner to save your profile and assign your training.

### Assigning Training by Company Level and Category

**Step 1:** To assign training by **Company Level and Category**, select the option and the level you want to map. This is based on your company structure. For example, assign to a specific department, location or site.



**Step 2:** Once the level is selected, select the name(s).



**Step 3:** Select the job categories of the users who are located within the selected level to assign the course to. Only users with the selected categories within the selected company levels will receive the profiled course.

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

Map Course to: ☐ Company Level ☐ Category ☒ Company Level and Category ☐ Admin Level

Select level to map: Site

Select name(s): Ontario : Niagara Office

Job Category: Supervisor/Manager

Select course(s): Choose Courses...

Assignment Type: Optional

Apply to new hire only: ☐

Complete By: ☐

**Step 4:** Select the name of the course(s) you wish to profile.

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

Map Course to: ☐ Company Level ☐ Category ☒ Company Level and Category ☐ Admin Level

Select level to map: Site

Select name(s): Ontario : Niagara Office

Job Category: Supervisor/Manager

Select course(s): AODA Full  
Food Safety Orientation Training

Assignment Type: Optional

Apply to new hire only: ☐

Complete By: ☐

**Step 5:** Select the course assignment type. For example, mandatory or optional. This will tell the user on their training page what your expectations are in taking the training, and also allows your administrators to filter down the type of assignment in your training reports. If you need to add more assignment types, refer to the configuration settings user guide.

Assignment Type: Mandatory

Apply to new hire only: ☐

Complete By: ☐

**Step 6:** Select whether the course is to be completed by only new hires. If selected, a New Hire Date and calendar will appear allowing a date to be selected. This profile will now only be applied to employees hired on or after this date according to their start date information.

Apply to new hire only: ☒

New Hire Date:

Complete By:

**Training Profiled**

Display Profile By:

Select Courses:

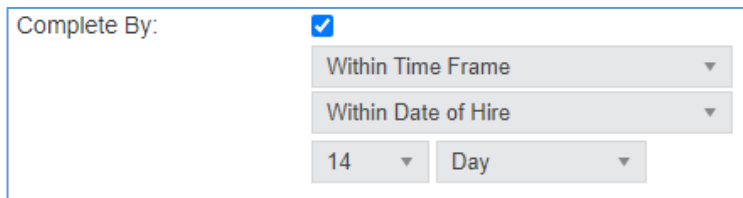
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
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**Step 7:** Do you want users to have a specific date they need to complete the assigned training by? If so select off the complete by requirement.

**Fixed Date:** Choose the specific date that the assigned training should be completed by.

**Fixed Yearly Date:** Choose the month and day that training should be completed by and how many years the date will recur for. E.g. July 1st, every year for the next five years.

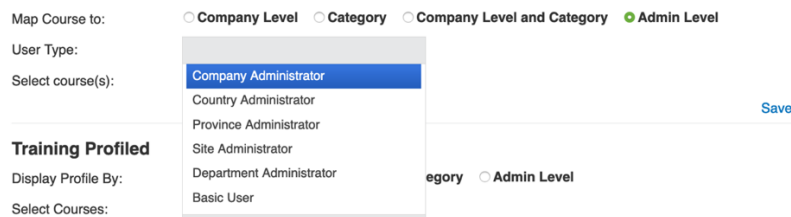
**Within Time Frame:** Choose how many days, weeks, months or years the user has to complete training and whether the time frame starts from the date of hire, date of assignment, or from the time the course is started.



**Step 8:** When complete, select the **save** button in the lower right corner to save your profile and assign your training.

## Assigning Training by Admin Level

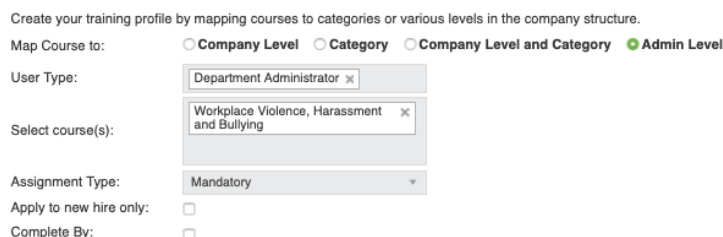
**Step 1:** To assign training by **Admin Level**, select the level you want to map to. This is based on your admin levels in the system.



**Step 2:** Select the name of the course(s) you wish to profile.



**Step 3:** Select the course assignment type. For example, mandatory or optional. This will tell the user on their training page what your expectations are in taking the training, and also allows your administrators to filter down the type of assignment in your training reports. If you need to add more assignment types, refer to the configuration settings user guide.



**Step 4:** Select whether the course is to be completed by only new hires. If selected, a New Hire Date and calendar will appear allowing a date to be selected. This profile will now only be applied to employees hired on or after this date according to their start date information.



Apply to new hire only: ☒

New Hire Date:

Complete By:

**Training Profiled**

Display Profile By:

Select Courses:

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
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**Within Time Frame:** Choose how many days, weeks, months or years the user has to complete training and whether the time frame starts from the date of hire, date of assignment, or from the time the course is started.

Complete By: ☒

Within Time Frame

Within Date of Hire

14  Day

**Step 6:** When complete, select the **save** button in the lower right corner to save your profile and assign your training.

## Assigning Training by Specific User

**Step 1:** To assign training by **Specific User**, select the users you want to map to from the list.

Map Course to: ☐ Company Level ☐ Category ☐ Company Level and Category ☐ Admin Level ☒ Specific Users

Specific User

Select course(s):

Assignment Type:

Apply to new hire only: ☐

Complete By:

**Training Profiled**

Display Profile By:

Select Courses:

Davies, Diamond

DeVry, Cornelius

Fang, Lei

Jones, Tom

Macuso, Ulred

Manoe, Sameer

Martin, Alex

**Peters, Jessica**

VanHelsing, Petra

Walker, Alice

[Save](#)

☐ Category ☐ Admin Level ☐ Specific User

**Step 2:** Select the name of the course(s) you wish to profile.

Map Course to: ☐ Company Level ☐ Category ☐ Company Level and Category ☐ Admin Level ☒ Specific Users

Specific User:

Select course(s):

**Step 3:** Select the course assignment type. For example, mandatory or optional. This will tell the user on their training page what your expectations are in taking the training, and also allows your administrators to filter down the type of assignment in your training reports. If you need to add more assignment types, refer to the configuration settings user guide.

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

Map Course to: ☐ Company Level ☐ Category ☐ Company Level and Category ☐ Admin Level ☒ Specific Users

Specific User:

Select course(s):

Assignment Type:

Apply to new hire only: ☐

Complete By: ☐

**Step 4:** Select whether the course is to be completed by only new hires. If selected, a New Hire Date and calendar will appear allowing a date to be selected. This profile will now only be applied to employees hired on or after this date according to their start date information.

Apply to new hire only: ☒

New Hire Date:

Complete By:

**Training Profiled**

Display Profile By:

Select Courses:

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
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**Step 5:** Do you want users to have a specific date they need to complete the assigned training by? If so select off the complete by requirement.

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**Within Time Frame:** Choose how many days, weeks, months or years the user has to complete training and whether the time frame starts from the date of hire, date of assignment, or from the time the course is started.

Complete By: ☒

**Step 6:** When complete, select the **save** button in the lower right corner to save your profile and assign your training.

# Viewing Profiled Training and Making Changes

As previously mentioned, on the bottom of the Edit Company Training Profile page is a separate tool to allow you to view and report how training is already profiled and make any necessary changes.

You can view how training is profiled in a variety of ways:

- By course: this allows you to report on how the selected course is assigned.
- By company level: this allows you to select a company level and view the training that is assigned to that specific company level.
- By category: this allows you to view the training assigned to the selected category.
- By admin level: this allows you to view the training assigned to the specific admin level.

**Step 1:** Select how you wish to see how the training is assigned. In this example, we will view by a specific course.

## Training Profiled

Display Profile By: ☒ Course ☐ Company Level ☐ Category ☐ Admin Level ☐ Specific User

Select Courses:

**Step 2:** Select the course from the list and click view. This will show you how the course is assigned.

## Training Profiled

Display Profile By: ☒ Course ☐ Company Level ☐ Category ☐ Admin Level ☐ Specific User

Select Courses:  [View](#)

**Step 3:** The report will display how the course has been assigned. In this example, the course has been assigned by company level and category. To make changes, delete the profile by selecting the delete button, and then recreate it using the tools above.

Training Profiled

Display Profile By: ☒ Course ☐ Company Level ☐ Category ☐ Admin Level ☐ Specific User

Select Courses:

Course Name	Assignment	Assignment Type	Level Assigned	Assigned to	Category Assigned	Admin Level	Specific User	Service	Apply to new hire only	New Hire Date	
AODA Full	Mandatory	Company Level	Province	Canada : Ontario	n/a	n/a	n/a	Human Resources	No		<a href="#">x</a>