Training Management

VelocityEHS®

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Contents

Training Classifications

Job: *A title that describes the tasks or responsibilities of an employee. In the system jobs are location specific*

Work Function: *Task an employee performs as part of their job or designated responsibilities.*

Creating a Training Classification

- Create a new job or work function by clicking 'Admin' from the navigation bar, under "Personnel" and then select "Job Editor" or "Work Function Editor". Click 'Add New' and enter the required information.
- Here are some pointers for you to consider:
    - Jobs can be associated to a specific location.
    - Jobs can be associated to one or more work functions (and vice versa). Keep in mind, you must have already created a work function in the application.
    - Jobs or Work Functions can be edited or deleted once created.

Try this:

- [ ] Create a work function. Save.
- [ ] Create a job. Save.

Knowledge Check:

1. Where can I find the job or work function editor?

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2. True or False: A work function can be linked to a job.
3. What is a difference between creating a job and a work function?

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Assigning a training classification to a profile

- Assign a new job or work function to a trainee's profile by clicking 'Monitor' from the navigation bar, under "Training" click on "Training Profile". Select an active user and navigate to the "Classifications" tab.
- Here are some pointers for you to consider:
    - A classification is assigned at a location. The default location is auto suggested and sourced through the user imports file primary location.
    - The job or work function is defaulted to "current". If the employee moves to a new job/work function, you must manually edit the classification to uncheck "current" and add the new classification for the employee. This ensures that all requirements will be assigned correctly.
    - The start date can be defined as of today's date, hire date (sources by the user imports hire date) or other.

Try this:

- [ ] Add a job that would apply the employees' hire date. Save.
- [ ] Add a work function that would apply as of the start of the past calendar year. Save.

Knowledge Check:

1. True or False: An employee can have more than one job or work function.
2. True or False: A job classification cannot be changed once added.
3. Where does the employee training profile information come from?

Topic

Subject matter on which someone can be trained.

Entering a new topic

- Add a new topic by clicking 'Add New' from the navigation bar, click "Topic" and fill out the form using an example you create.
- Here are some pointers for you to consider:
  - Add as many details as possible. This will make the entered topic more valuable.
  - In the 'Training Type' category, select all that the topic applies to.
  - Use the hamburger menu to save the topic.
  - Add materials such as a facilitators guide to the "attachments" tab within the topic to make accessing these documents amongst instructors easier.

Try this:

- [ ] Enter a topic. Save and Exit.
- [ ] Define the topic training guidance.
- [ ] Add any topic material that may be helpful.

Knowledge Check:

1. True or False: Topics can only have one "Training Type".
2. True or False: I need to create a topic for each one of my locations.
3. Why can topics not be deleted? ____

____

Requirement

The required training on a topic for a job or work function at a location within a timeframe.

Creating a requirement for a topic

- Add a new requirement by clicking 'Add New' from the navigation bar, click "Requirement" and fill out the form using an example you create. Here are some pointers for you to consider:

- Add as many details as possible. This will make the entered topic more valuable.
- In the 'who' category, select all classifications (jobs and/or work functions) that this requirement would apply to for this location
- Define the 'criteria' of this requirement, select 'how' (mandatory or recommended and topic verification) and 'when' (once or reoccurring).
- Use the hamburger menu to save the requirement.

Try this:

- [ ] Enter a requirement for a topic. Save and Exit.
- [ ] Assign multiple classifications to this requirement for a single location.
- [ ] Define the verification type.

Knowledge Check:

1. True or False: I can create a requirement that would apply to all locations.
2. Describe what "due 3 days after classification applies to person" means

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3. True or False: Requirements can be deleted.
4. Why would you inactivate a requirement?

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Training Record

An entry indicating the amount of training a specific person has received on a specific topic.

Entering a Training Record to a Training Profile

- Add a training record to a training profile by clicking 'Monitor' from the navigation bar, under "Training" click "Training Profile". Select an active user and navigate to the "Training History" tab.
- Here are some pointers for you to consider:
  - Enter the training records duration. This will allow you to report how many hours of training have been completed
  - Enter training record verification type and result. Note if there is a requirement associated to this topic the verification type must match to meet training requirement.
  - A training record will automatically be entered and submitted for a scheduled or completed session in the application.

Try this:

- Add a training record. Save.
- Review the "Training Status" within a user's training profile to see what topics are required or recommend based on their job and/or work function classifications.
- Update the "Training History" to comply with a topic requirement by adding a new training record to a user's profile. Verify that the "Training Status" has been updated from an ✕ to a ✓.
- Attach training certificates or completion documents to a user's Training Profile.

Knowledge Check:

1. True or False: My Training Status is updated by my training history.
2. How is the due date of my topic's requirement calculated?

3. True or False: When I get recertified for a topic, I edit the already existing training record.
4. True or False: I can edit a training sessions record in my training profile.

Schedule/Add a Completed Session

- Schedule or add a completed training session by clicking 'Add New' from the navigation bar, click "Future Session" or "Completed Session" and fill out the form using an example you create.
- Here are some pointers for you to consider:
  - A session is the delivery of training on one or more topics at a specific date and location to a list of attendees.
  - Enter the topic and requirement details. Note if there is a requirement associated to this topic the verification type must match to meet training requirement.
  - Enter all session details to ensure participants have all session information for attendance.
  - Identify training attendees by name or classification.
  - Use the hamburger menu to save the session.
  - Enter session results and duration if entering a completed session.
- From the monitor menu, click on 'session' to see any completed sessions, sessions in draft, or pending results.
  - In the hamburger menu, instructors can print attendance sheets for the session, cancel or copy the session and export the session to a calendar invite.
  - Individuals can also click on the hamburger menu to register for a session.

Try this:

- [ ] Add a completed training session. Close.

- Schedule a future session and add attendees by searching by classification.
- Review a user's "Training History" in their training profile to see completed sessions results.
- Attach training materials to a training session on the attachments tab.

Knowledge Check:

1. True or False: My Training history is updated by the session I attended.
2. True or False: I can add groups of employees to a completed training session.
3. True or False: The topic verification type in a session updates based on the topic requirement created.
4. True or False: I can print an attendance list for my scheduled sessions.
5. Describe what the future sessions capacity field does?

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6. True or False: A general user can register for a scheduled session.
7. Where does the sessions training methods used come from?

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Importing Training Records

- Import training records by clicking 'Admin', under "Training" click on "Import Training Records" and "New Import" on the blue bar.
- Here are some pointers for you to consider:
  - Select the appropriate template and click "Preview"
  - Enter the record completion details into the template csv. file. Note all columns are required.
  - Save the csv file template to your desktop.

- Select the updated template file from your desktop by clicking on the "File Selection" option on the "Import Training" page.
- Import Data for review.
- Data errors are highlighted and can be updated before uploading file into the VelocityEHS solution.
- Import confirmed data.

Try this:

- [ ] Import training records.
- [ ] Update training record errors and confirm import.

Knowledge Check:

1. True or False: I can import more than one topic in a single import file.
2. What does the confirmation status mean?

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3. True or False: I cannot update data errors in the VelocityEHS solution?
4. True or False: I can edit an imported training record on my training profile.
5. True or False: I can delete the training record import once closed.

Tips and Tricks

- Use the 'Pass Verification' type as your default verification type because regardless of your topic being a percentage, grade or even participation mark the pass verification type allows you to identify if the topic completion has met the pass criteria by adjusting the result field (pass or fail).
- Upload training presentations to Topics as attachments when appropriate.
- Be creative with design of work functions and job classifications to simplify the admin process and reduce the number of training requirements.