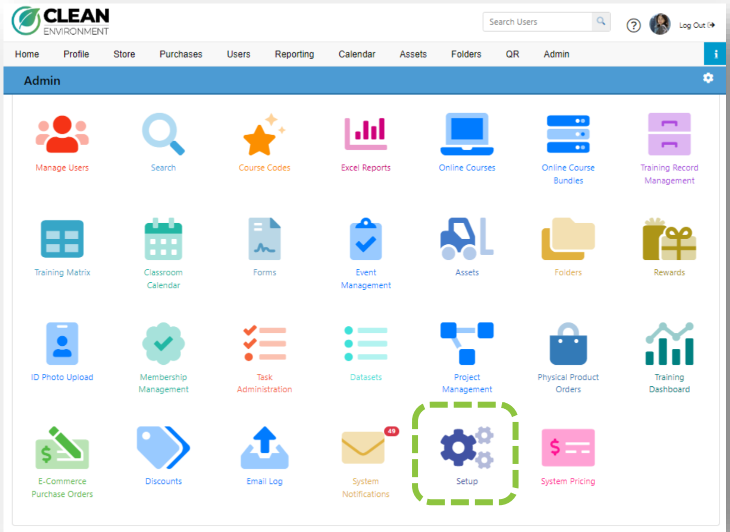
Your Portal Setup Guide (Network Partners)

Welcome to your BIStrainer portal! This guide helps you decide which settings to turn on and how to customize features to deliver a great user experience and meet your company's needs.

Configure your portal by navigating to **Admin** in your portal menu and clicking **Setup**.



☑ In this guide, **recommended** settings are checked for you.

Expand your company settings menu in the right pane to access features for key system areas.

Helpful Tip: *Click the* Help ⓘ *icon in your portal header to search our library of Frequently Asked Questions (FAQs).*

General Information

Information you specify under General Information is pulled into invoices, reports, certificates, and notifications sent to users in your portal. Emails added here receive important automatic system-generated and security-related notifications.

General Information

Company Name – Your company name provided during the portal commissioning process. Please notify your account manager if you wish to update this name.

☑ **Time Zone** – Specify your company's time zone, which is used in our system for you to schedule reports and system notifications in the *Email Notification Centre*.

☑ **Language** – Enter your portal's language. Note that user's can translate most text displayed in your portal to French, German, Spanish, or Portuguese from their account settings if the *Language Preferences* feature is enabled.

Contacts

After the software agreement is completed, our team will complete the following important contact information for you:

- ✓ Main Contact
- ✓ Admin Contact
- ✓ Billing Contact
- ✓ Contract Contact
- ✓ Customer Contact

We recommend that you periodically check and update the Main Contact and Admin Contact to ensure your company receives critical and security-related information.

Helpful Tip: *Add multiple email addresses by separating them with a comma and no spaces.*

Company Information

The company address and phone numbers added here can be pulled directly onto course completion certificates and invoices or added to confirmation emails and other notices sent to users in your portal.

☑ **Notification Email** - Please enter at least one email here to receive critical notifications about changes made to your system by us or your users.

Notifications include:

- *User Profile Changes*
- *New Client Admin and Course Admin notification*
- Monthly Billable User Report.

☑ **E-Commerce Notifications** – This email receives automated receipts for every purchase made from your e-commerce store and a weekly online course update summary email about new courses added to the store.

BIS Admin

This subsection identifies your account manager, type of portal, and other information from your contract with us. Contact your account manager if you would like to add any new features or subscribe to any course packages.

Training Summary Report

You can generate a Training Summary Report for each user in two ways:

1) User Accounts (*Admin > Search > [Search username] > User's Home Tab > Training Summary Report*)

2) Reporting Dashboard (*Reporting > Training Completed by User > [Select User Name] > User Training Summary Report)*

Here in the company settings, you can customize the information in the User Training Summary Report by selecting:

User Information Fields – Select the information from user accounts, such as email, company roles, total hours of training, and address.

- Created By – the user who created the user's account.
- Location – Location of the user in your company's structure shown in the User Administration page by clicking **Users** in your portal menu.

Report Sections – Organize and display training in your report.

☑ **Completed** – Training and forms users have completed.

☐ **Show expired courses** – Include expired courses.

☐ **Display archived records** – Include archived training records.

☐ **Document Sign-Off in Folders** – Documents in folders that the user has signed.

☑ **In Progress** – Training and forms the user has started but not completed.

☑ **Assigned** – Training and forms the user purchased or has been assigned by an administrator.

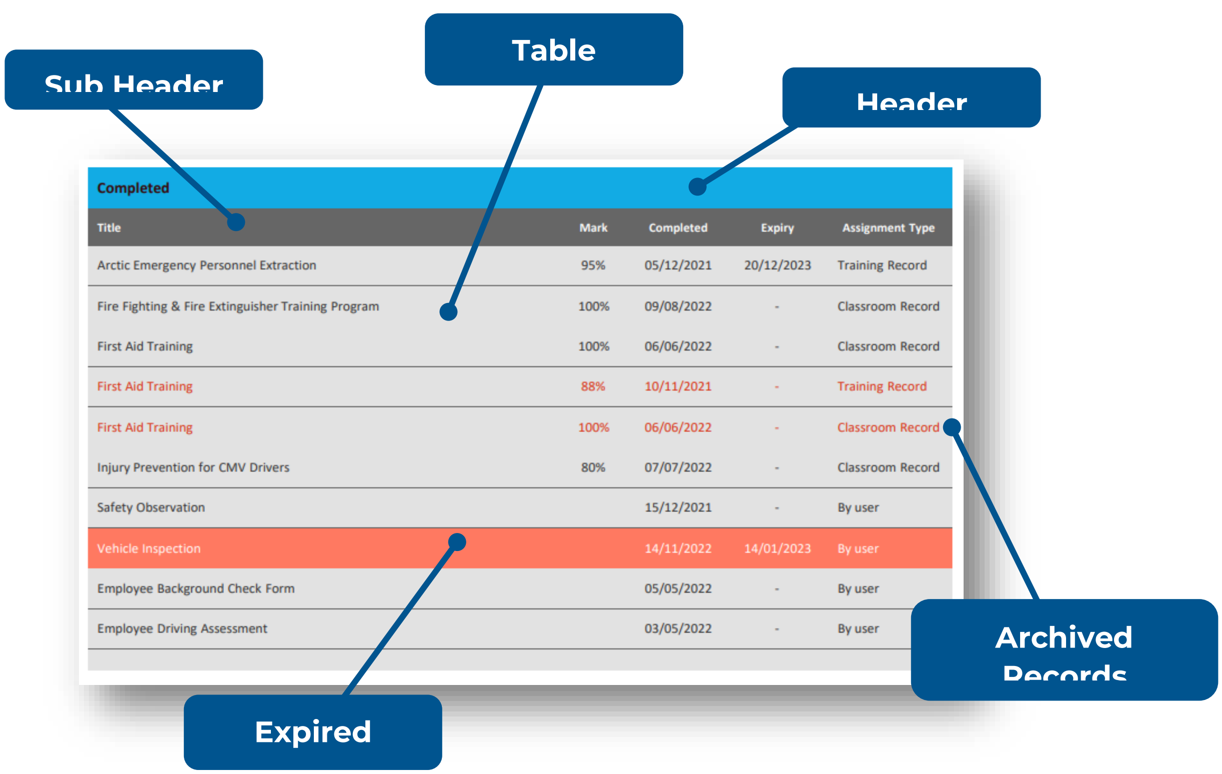
☑ **Required** – Required training based on the user's company role in the training matrix.

☐ **Optional** – Optional training based on the user's company role in the training matrix.

☐ **Documents** – Documents uploaded to the user's profile.

Completed Section Table Data – If you have selected Completed in the Report Sections list, select the course completion information, such as expiry date and certificate number.

Report Colours – Customize your report section colours.

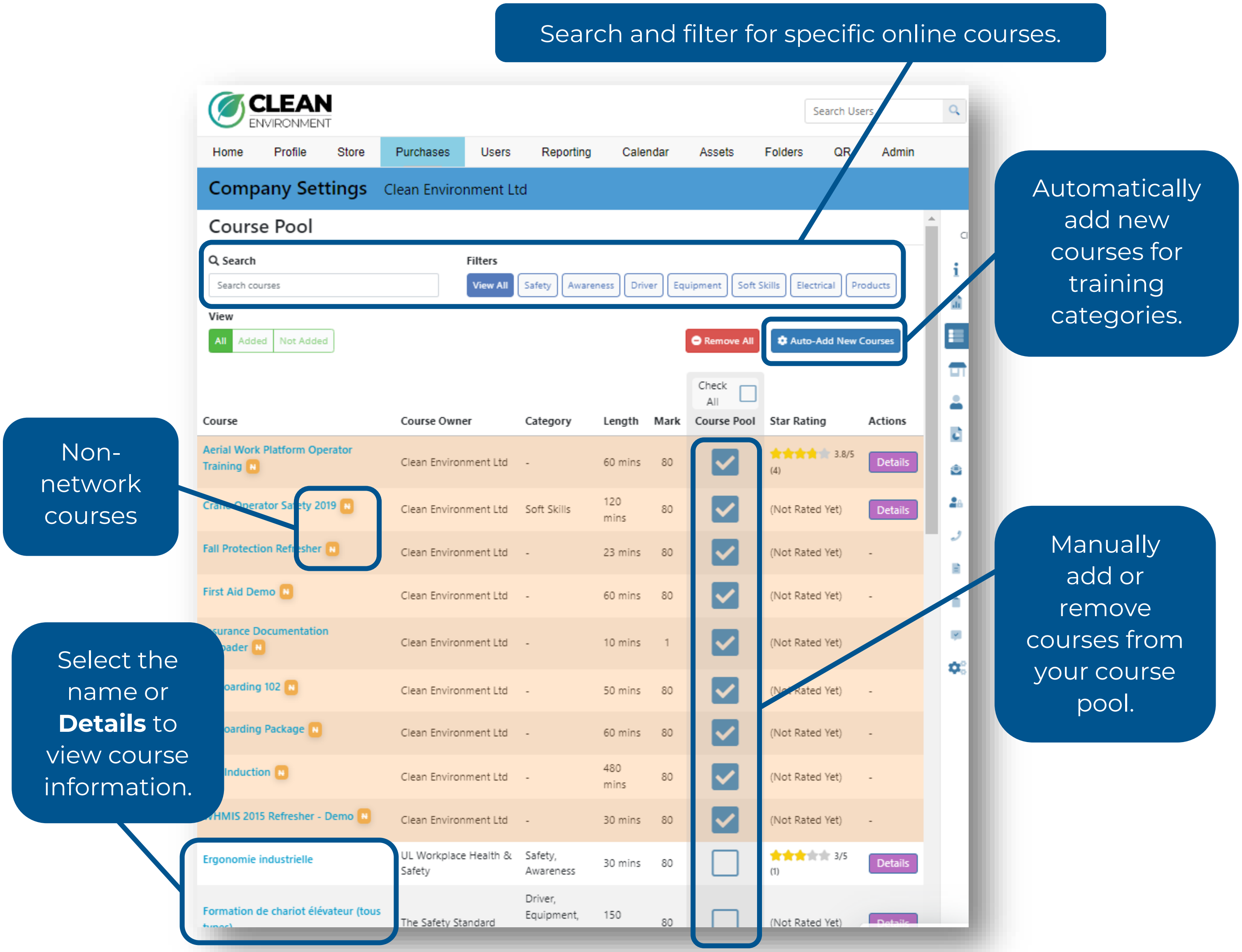


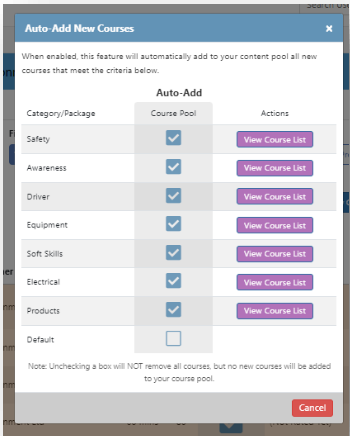
Completed				
Title	Mark	Completed	Expiry	Assignment Type
Arctic Emergency Personnel Extraction	95%	05/12/2021	20/12/2023	Training Record
Fire Fighting & Fire Extinguisher Training Program	100%	09/08/2022	-	Classroom Record
First Aid Training	100%	06/06/2022	-	Classroom Record
First Aid Training	88%	10/11/2021	-	Training Record
First Aid Training	100%	06/06/2022	-	Classroom Record
Injury Prevention for CMV Drivers	80%	07/07/2022	-	Classroom Record
Safety Observation		15/12/2021	-	By user
Vehicle Inspection		14/11/2022	14/01/2023	By user
Employee Background Check Form		05/05/2022	-	By user
Employee Driving Assessment		03/05/2022	-	By user

Course Pool

You can manage the courses that your company administrators can add to user accounts.

- If a course is available on the public network, click the course name or **Details** to find out more information, such as the course duration and certifications.
- **Non-network courses** are not on the public network **[N]** and will not display additional information.



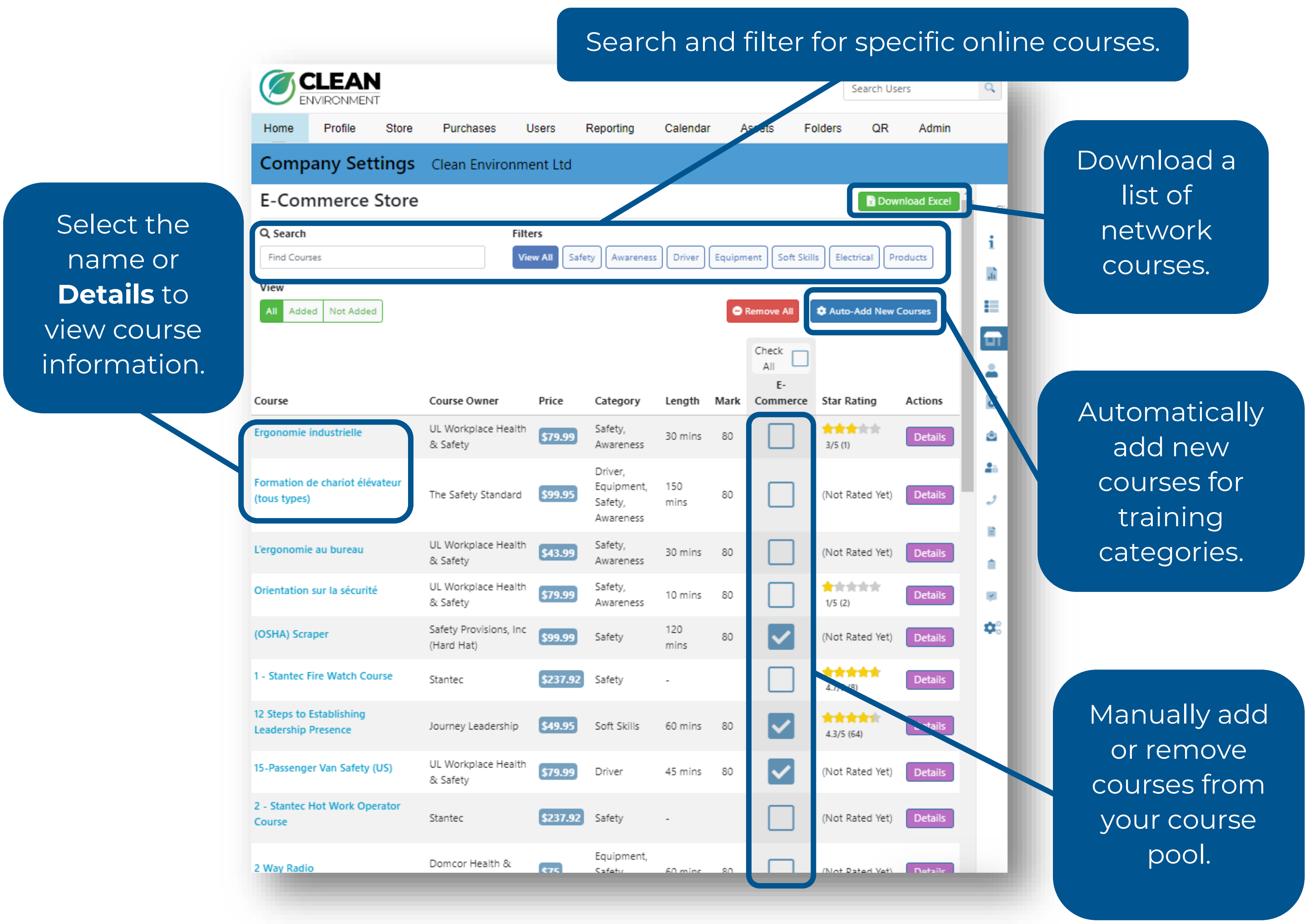


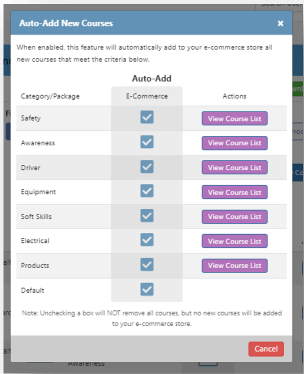
When you click **Auto-Add New Courses**, new courses under categories that you check are automatically added to your portal's course pool.

E-Commerce Store

You can manage the courses that are available in your portal's Store for users to purchase by clicking **Store** in your portal menu.

- If you share your public Store link, then anyone can purchase courses by creating an account in your portal.
- If a course is available on the public network, click the course name or **Details** to find out more information, such as the course duration and certifications.
- Courses will not show any details if they are not publicly available.





☑ When you click **Auto-Add New Courses**, new courses under categories that you check are automatically added to your portal's e-commerce store.

Profile Fields

The Profile Fields page allows companies to collect, display, and manage user information for Admin Users and End Users. By default, first name, last name, country, province/state, language, and system user role are required fields.

Information that users enter into profile fields are often pulled into course completion certificates and digital forms. The profile fields we recommend that you add and make required are:

☑ **Address** - City, Province/State, Country, Postal Code

☑ **Email address** – So users receive important notifications from you and about their account.

☑ **Cell phone** - For text message notifications and multifactor authentication (coming soon).

☑ **User's company information** - Name, City, Province/State, Country, Postal Code

You may also create custom profile fields with optional security features that will hash out entered information and show them only to those with an encryption key.

Helpful Tip: *You can customize the* Employee ID *field label to reflect your company ID name (e.g., Employee No. or Agent ID) using the* Custom ID *feature in your company settings.*

Admin Users

Admin Users are system user roles which can access user accounts by:

- Clicking **Users** in your portal menu.

- Searching for users using the *Search* field in the portal header.
- Using the **Search** module from the **Admin** page of your portal menu.
- Selecting participants registered in Classroom events through the **Classroom Calendar** module.

Account Creation

These profile fields are displayed when admin users add a new user in a specific company structure location. By default, first name, last name, country, province/state, language, and system user role are required fields.

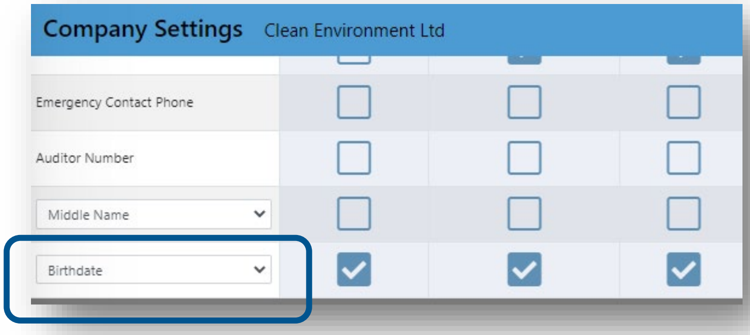
Classroom Registration

These profile fields are displayed when admin users add a participant to a classroom calendar event.

Edit User Page

These profile fields are displayed when admin users access a user account in the portal (Admin view).

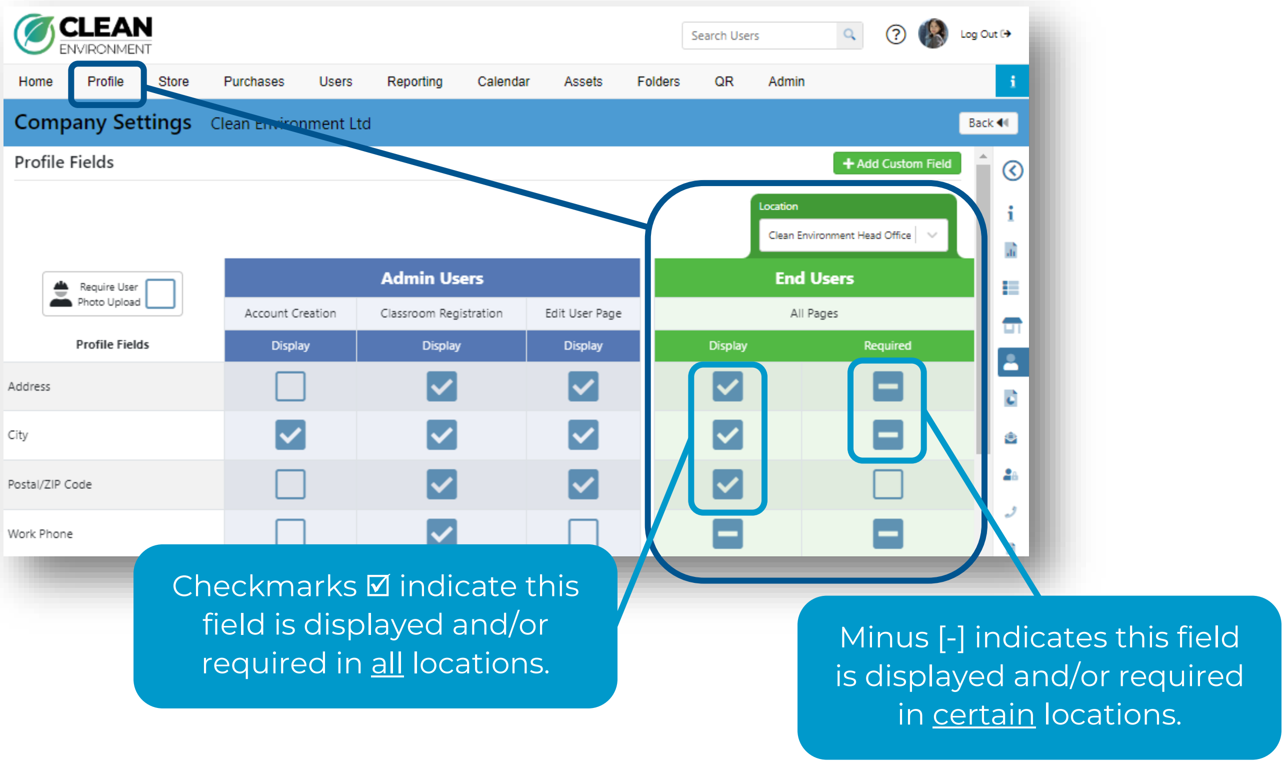
☑ Important: *Use the Birthdate profile field if you must collect birthdates. When you enable birthdate encryption, data in Birthdate fields can be hashed (****) in user accounts and in Excel reports and forms that pull this information.*



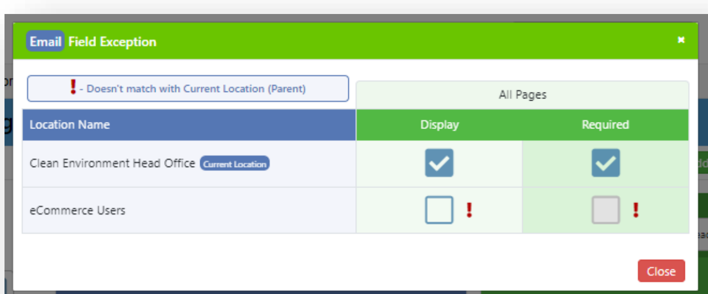
End Users

End Users are any users with an account in your portal, and they can see and modify the fields you select here when they activate their accounts or click **Profile** in your portal menu.

- *Location* drop-down – Customize the profile fields end users can see and modify in different locations of your company structure that is shown by clicking **Users** in your portal menu.
- Choose which displayed profile are required fields.



Select the **minus [-]** box to see which locations this field is used or not.

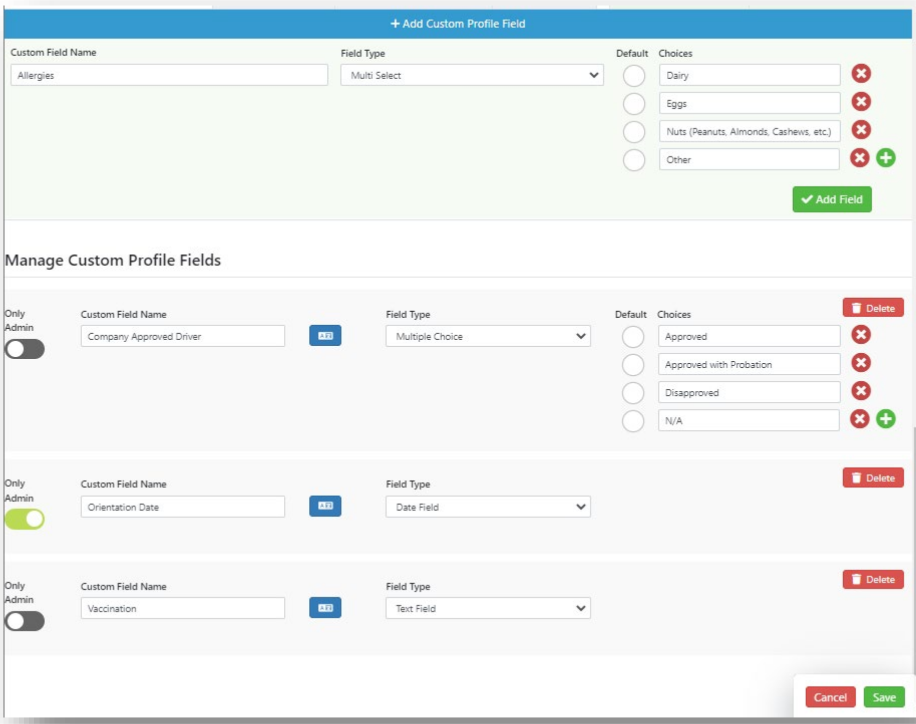


Custom Profile Fields

You can create new profile fields by clicking **+ Add Custom Profile Field**. Use the *Field Type* drop-down menu to set your custom field to:

- **Text** – Users may type any response.
- **Multiple choice** – Users can select one option from choices you provide.
- **Date** – Users may select a date.
- **Multi select** – Users may select multiple options from choices you provide.

If you turn on **Only Admin**, users can see the custom field in their profile (if checked), but only admin users can modify the entry.



Reporting Widgets

You can manage the widgets that users can add to their Reporting dashboard by clicking **Reporting** in your portal menu.

- **Availability** – Allow users to add this widget to their dashboard.

- **Default Display** – Display this widget by default when users access their Reporting dashboard for the first time. They can choose to hide it after.
- **Default Widget Settings** – Customize the default widget settings.

Widget Descriptions

☑ **Location (✓ Default Display)** - View the training performance in specific locations and sublocations as well as select users in locations to view their individual training performance. You can generate the *User Training Summary Report* from this widget.

☑ **Users (✓ Default Display)** – Displays the training performance for all users in your portal, such as incomplete courses, final marks, completion times, and number of attempts for each course they have completed. You can generate the *User Training Summary Report* from this widget.

☐ **Required Training** – View the training performance in specific locations and sublocations for required training assigned to users with specific company roles if your portal has a training matrix set up.

☑ **Course Codes** – Shows course codes and titles that have been assigned by location, including the number of seats remaining, the date the course code was created, completion certificates, and more.

☐ **Training Matrix Summary** – Displays the required, optional, and location-specific training assigned to company roles, including the completion and expiry dates of training for users.

☐ **Form** – Provides performance metrics about how digital forms are being completed, assigned, and scheduled to users in your portal.

☐ **Driver Information** – Helps companies check that users with driving-related roles meet driving requirements by showing driver's licence number, class, expiry, and location of issue. To protect the personal information of your users, the driver's licence number is hashed (****) by default.

☐ **Evaluator Matrix Summary** – Users with *Evaluator 1 and Evaluator 2* roles can see the training performance of all users who report to them. **Note:** Users must have an

Evaluator Reporting system user role to see and add this widget to their Reporting dashboard.

☐ **Graphs** – Displays bar graphs showing the number of courses completed daily, monthly, or annually or a pie chart of satisfied and unsatisfied training requirements and the status of training requirements (e.g., about to expire).

☐ **Form Graphs** – Displays form graphs created in the Form Dashboard.

☑ **Course** – Summarizes the different types of courses assigned, not started, in progress, completed, or repeated in a selected location.

☐ **Folder** – Displays the digital folders in your portal, the documents and forms in each one, and the users assigned folder contents.

☐ **Training Gap** – Shows the number of users and training gaps in each location and sublocation.

☐ **Classroom Registrant** – Shows the number of users registered in classroom events in selected locations.

☐ **Task Reporting** – Shows pending, overdue, completed, and archived tasks assigned to users in your portal from digital forms. From this widget, you may be able to view the form where the task was assigned and provide comments. You can generate a Task Report from this widget.

☐ **Form Completion Activity** – Shows assigned, pending, and completed forms that you select that are assigned to assets, locations, and users.

Email Notification Centre

The email notification centre is an essential communication tool.

- ✓ Ensures your administrators and users system-wide receive important alerts and reminders automatically.
- ✓ Allows you to send important messages to all users in your portal or groups of users when needed.

***mailer@bistrainer.com** is your default email domain name unless you specify a custom domain name, such as training@cleanenvironment.com. Reach out to your account manager if you would like to set up a custom email domain name.*

System-wide Emails

Enable or disable certain system emails that are automatically sent to users. Depending on the email feature, you can:

- Customize the subject and message in English, French, German, and Spanish.
- Pull user, company, course, folder, form, and document information automatically into emails.
- Set weekly and monthly email frequencies.

IMPORTANT!

Our system sends other important automatic email notifications, some of which you can enable or disable. The notifications in this Email Notification Centre are primarily ones that you can customize and/or schedule.

Additional system notifications are available by clicking **More Settings** in the right Setup menu, expanding the Settings section, and expanding the *System Notifications* section.

In various types of email notifications, you can use custom variables to pull information about your company specified in the *General Information* of your company settings, user *profile information*, and course, form, folder, and document information. Just copy the custom variables (e.g., "{CompanyName}") into your email message as a placeholder. The custom variable in the email sent to users will populate automatically with data entered in the fields.

EXAMPLE

You might customize your email message by entering:

Hi {Name},

Welcome to {CompanyName} training! Please activate your account using this code: {Code}.

Then a new user, Ray, will receive the email:

Hi Ray,

Welcome to Clean Environment training! Please activate your account using this code: 123456.

Account Management

☐ **New User Notification** – Notifies the users specified whenever a new user is added to a location.

☑ **Account Activation Email** – When a new user is added to a location in your company structure, customize a welcome email containing instructions to activate their account.

☐ **User Deactivation Notification** – Notifies the users specified whenever a user account is deactivated.

☐ **Re-activated Account Notification** – Notifies certain users specified when a deactivated user account is re-activated.

Training Management

☑ **New Course Added to Account** – Notifies users when new courses and forms are added to their account. You can choose to exclude courses and forms automatically assigned by the training matrix based on their company role. If users access their accounts using our SafeTapp mobile app, they can choose to receive push notifications about new courses and forms added to their account.

☑ **New Bundle Added to Account** – Notifies users when a new course bundle is added to their account.

☐ **Folder Permission Notification** – Notifies users when they have a new permission to access a folder that contains forms, courses, or other documents.

☑ **Unfinished Course Reminder** – Reminds users to complete courses they've started but have not completed.

☑ **Not Started Course Reminder** – Reminds users that they have assigned courses that they have not started.

☑ **Expiring Course Notification** – Alerts users that a course certificate they have is about to expire. Courses can be set to auto-assign when the expiring notice period is reached. **NOTE:** When courses are auto assigned, users can receive a **New Course Added to Account** notification if it is enabled (see above).

Helpful Tip*: You can set the <u>expiring</u> notice period in your company settings for some email features. By default, this period is 90 days prior to the expiry date.*

☑ **Expiring Course Alert for Managers** – Alerts users with Reporting Manager, Senior Reporting Manager, Reporting Learner, and Senior Reporting Learner system user roles when users in the portal have expiring courses.

☐ **Training Requirement Reminder** – Reminds users that they have unsatisfied training requirements based on their company role and the training matrix, as well as required training, that will expire within the expiring notice period. Courses can be set to auto-assign when the expiring notice period is reached. **NOTE:** When they're auto assigned, users can receive a **New Course Added to Account** notification if it is enabled (see above).

☐ **Training Record Status** – Notifies users if a training record they uploaded has been approved or denied. You can limit this notification to denied records only.

☑ **Course Code Limit Notification** – Notifies users who create course codes that the available quantity has been used up.

Forms and Document Management

☐ **Expiring Folder Document Alert for Managers** – Notifies Senior Reporting Managers, Reporting Managers, Senior Reporting Learners, and Reporting Learners when folder documents will expire within 90 days or within the *Expiring Training/Document Period*.

☐ **Expiring Form Notification** – Notifies users when forms assigned to them or to assets that they are responsible for will expire within 90 days or within the *Expiring Training/Document Period*.

☐ **Expiring Form Notification for Managers** - Notifies Senior Reporting Managers, Reporting Managers, Senior Reporting Learners, and Reporting Learners when users have forms that will expire within 90 days or within the *Expiring Training/Document Period*.

☐ **Incomplete Folder Reminder** – Notifies users that they have incomplete folders.

☐ **Expiring Documents in Assets** – Notifies users when documents uploaded to assets are about to expire within 90 days or within the *Expiring Training/Document Period*.

Task Management

☐ **Incomplete Tasks Reminder** – Reminds users when they have pending tasks to complete.

Client Notification System

The Client Notification System allows you to send important emails with attachments from the system to users in your portal manually. Emails from the system can be sent to users by:

- Location in your company structure (click **Users** in your portal menu).
- Company role from your training matrix.
- By country and/or province/state (based on their profile information).
- By system user role assigned.
- By language preference.
- By instructor status and specific courses they teach.

This client notification system lets you to allow users to deactivate their own accounts if they wish. By turning on **Deactivation Request** and including a sentence, such as "Would you like to keep your account? {Yes} or {No}", in your email, users can see and click **Yes** or **No** buttons to deactivate or keep their account.

Helpful Tip*: If you want to make sure your users receive important email notifications, make* *email notifications mandatory* *for all users in your portal in your company settings. Otherwise, they may turn off email notifications in their profile or unsubscribe to them.*

BIS Admin

The BIS Admin menu displays advanced configuration settings for your portal and system modules based on your company's software agreement.

System Security

The privacy of your users and the protection of data is important to us.

☑ Encryption Keys

Our system provides built-in fields in user profiles or digital forms for sensitive personal information, such as social insurance number (SIN)/social security number (SSN), and birthdate. This information may be displayed in user accounts, completed forms, and exported Excel reports.

When encryption keys are turned on, information in these fields are hashed (****) or users are required to enter an encryption key to access documents, completed forms, and Excel reports containing certain personal information.

- ☑ **SIN/SSN**
- ☑ **Birthdate**
- ☑ **Driver's Licence Number**
- ☑ **User Documents**
- ☑ **User Forms (Completed)**
- ☑ **Custom Profile Fields**

Important: When your portal is set up, your Client Admins are provided the encryption keys and are your company's responsibility to manage securely. If an encryption key is lost or you believe it has been compromised, please contact our Support Team immediately so that we may change it for you.

☑ Purge Code

We want to help companies avoid losing important information. Deleting important forms, user accounts, assets, and other items you create in our system may require a purge code that we provide to Client Admins when portals are set up. If you have lost your purge code or believe it has been compromised, please contact our Support Team immediately so that we may change it for you.

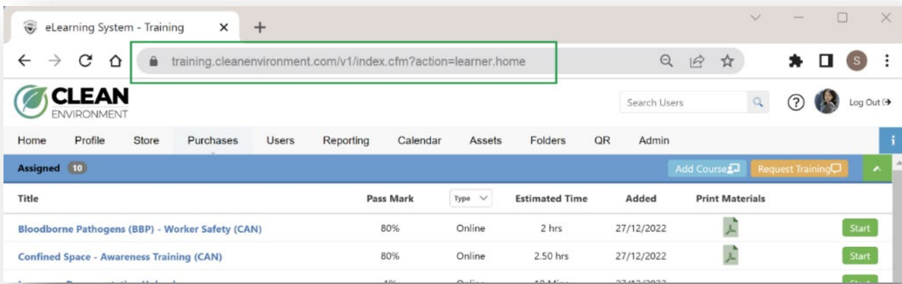
Other Features

If you are interested in any of these features, please reach out to your *account manager*.

☐ **API/SSO** – Application Programming Interfaces (APIs) allow you to directly exchange data between your internal systems and BIStrainer, such as new user uploads, bulk user modifications, training updates, and form updates. Single sign-on (SSO) allows users to access their accounts in multiple programs, such as this portal, by logging into your company's existing sign-in page.

☑ **E-Commerce** – Allows your portal to sell your company's online courses or publicly available online courses to the public or to users in your portal. When public individuals purchase courses from your store, they must create an account in your portal, and their account will be added to the eCommerce Users location or another location of your choosing.

☐ **Custom URL** – By default, your portal's URL begins with www.bistrainer.com. You can customize your URL, so the URL displays your company or portal name, such as www.safetyfirst.com or training.safetyfirst.com.



☐ **SMTP** – Simple mail transfer protocol (SMTP) allows you to customize the outgoing email address of system-generated notifications sent to your users, such as *training@yourcompany.com*. By default, all messages from your portal have the email domain *@bistrainer.com*.

☑ **User Language Preferences** – Users may select English, French, German, Spanish, and Portuguese in their profile. Your portal and available online courses will display in their language of preference.

Subscriptions

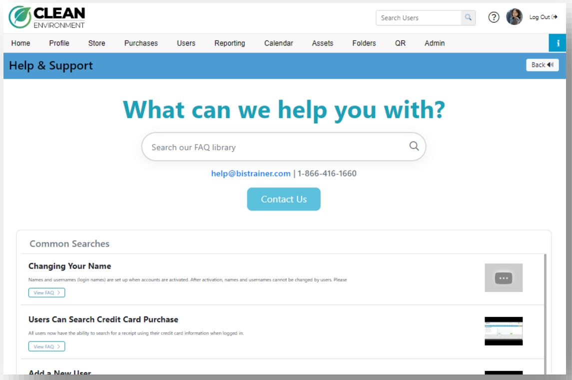
Subscription packages are collections of online courses that can be assigned to your users. Your contract indicates how many of these courses your users can complete each month. Please contact your [account manager]() if you would like to add any subscriptions.

Custom Help Contact

When users click **Help**  in the portal header, they can search our library of frequently asked questions (FAQs) or contact our Support Team by emailing *help@bistrainer.com* or phoning 1-866-416-1660.

If you would like your users to contact your company instead for assistance, you can replace the support team email and phone number and add custom help instructions.

If users fill out the online help form, their requests will be directed to the email you provide.



API Documentation

This page provides information about how BIStrainer and your company internal programs can securely exchange information using Application Programming Interfaces (APIs).

This documentation also describes how our system can be used for single sign-on services (SSO). With SSO, your employees and contractors can login through your company's login page and access their BIStrainer account without logging in again.

API Documentation:

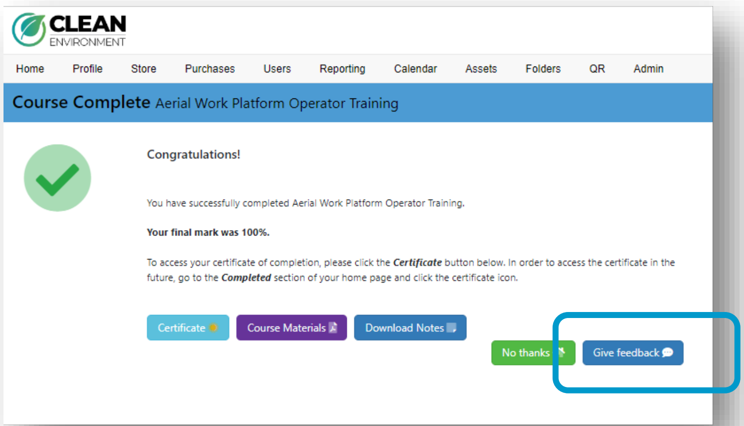
https://www.bistrainer.com/v1/index.cfm?action=apidoc.home

Notes

You can search for and track what changes were made to your portal and system module settings, including who made them and when they were made. You can add additional notes to explain why changes were made for record keeping purposes.

Master Course Feedback

With this feature, you can invite all users who successfully complete a course to complete a course feedback form.



Before you activate this feature, save an instructor course feedback form from your digital forms template library or create a custom course feedback form with the Forms module.

You may generate a one-time feedback report or schedule regular feedback reports that collects all the responses from the course feedback forms submitted by your users.

Company Setup

Your company setup page contains other important settings for your portal and system modules. **We are currently migrating the content here to new pages that are more user friendly.**

Not to worry! You will have all the same features and settings, and we will provide you with a detailed update and the support to find them.

We appreciate your patience!

General Information

Your company information and key contacts shown here are the same as the *General Information menu page* reviewed above. Changes made there are also reflected here.

Click **New Company Settings** to go back to the main **Setup** module.

Branding

Your basic branding page lets you customize your portal to reflect your company brand. You can upload a portal logo, login page image, background image, logos for the SafeTapp mobile app, and even the logo on user ID badges.

Our ***Portal Branding FAQ*** describes how you can update the colour and images on your portal.

Asset Manager

A record of all the images uploaded and used to customize your portal are stored here.

> **Warning:** Do not remove any images as it may break links to these images and your portal will not display correctly.

Change History

A record of your portal branding settings is stored every time a user saves changes in the basic branding page. If you need to restore your portal to previous branding settings, click **Use** on a prior date.

Header Colours

This section is reserved for legacy portals and does not apply to your portal.

Settings

☑ System Notification Emails

Sends notifications to the email addresses below whenever courses are completed by users.

Additional notifications below are available. These are in addition to automatic system notifications in the *Email Notification Centre*.

NOTE: These system notifications are standardized and cannot be customized.

☑ **Course Feedback Filter** – Restrict notifications to completed courses where users have provided feedback.

☐ **User Profile Changes** – Notifies you when user accounts are updated (sent to the *Notification contact* if no emails are designated here).

☐ **New Training Providers** – Notifies you when new training providers are added by users or admins (or new courses added to existing training providers).

☑ **Account Activation Reminders** – Please refer to the *Account Activation Email* in the *Email Notification Centre*. You can also trigger an email to all users with an inactive status.

☐ **Course Completion Notifications for Managers** – Managers, Reporting Learners, Reporting Managers, and Senior Reporting Managers are notified when courses are completed (successfully or not).

> ☐ **Failed Attempts Only** – if you turn on **Course Completion Notifications for Managers**, then we recommend turning on **Failed Attempts Only**.

☑ **Training Record Verification Notification** – Record Approver system user roles and those with email addresses here can approve or deny training records through email notifications.

☐ **Task Comment Notification** – Notifies the user who created a task when the users assigned to the task leaves a comment.

☑ Record Approval Email to Evaluator 1 and 2

Users designated in *Evaluator 1 and 2* fields in user accounts can also approve or deny training records through email notifications.

☑ New Client Admin and Course Admin Notification

Your *Notification contact* receives an email about new users granted Client Admin or Course Admin system user roles who have privileged access to modules and user data.

☑ 'Reply-To' Email Alias

Direct email replies to system-generated emails to the email addresses specified here. If this is turned off, replies are directed to *help@bistrainer.com*.

☐ "Do not reply" Email Footer

Mass system emails to users include this message in the footer: *This is an automated email notification. Please do not reply to this email address.*

☐ Date Field Prefix

Enter a prefix for the date field in user profiles (e.g., *Start* Date, *Hire* Date).

☐ Auto Deactivation

Deactivate inactive accounts or active accounts after a certain number of months of inactivity.

☐ Auto-Assign Expiring Online Courses

Allow the system to automatically re-assign all online courses when they are about to expire. You can then disable auto-reassign for specific online courses in in the online course configuration page.

☐ **Notify Users after course reassignment –** Notifies users when a course has been reassigned to their accounts.

Auto Archive

Auto archived content can still be viewed from an Archive page.

Helpful Tip: Archiving typically takes place monthly or daily at 5 AM MT.

Click **Archive Courses** to archive old or expired course completions.

Click **Un-Archive All Courses** to unarchive course completions. *Note:* they will be archived *again* if the auto archive feature is *left* on.

☑ **Auto Archive** – On the first of every month automatically archive older completed courses approved for training topics, keeping only the most **recently** completed approved course. Note: training topics may be satisfied by multiple courses. If a course satisfies multiple training topics, it is not auto archived.

☑ **Auto Archive Failed Tries** – Each month automatically archive failed tries.

☑ **Auto Archive Same Course/Training Record Completions** – Automatically archive daily past course completions and training records, except for the most recently completed.

☑ **Auto Archive Same Folder Completions** – Automatically archive daily past folder completions except for the most recently completed.

☑ **Auto Archive Same Form Completions** – Except for the most recently completed, automatically archive all past completed forms (of the same form) for all digital forms users completed in your portal.

Helpful Tip: *You can enable auto archive same form completions for specific forms only within the form's settings.*

☑ **Auto Archive User Forms** – Automatically archive all completed forms for users who have been deactivated for a specified number of months.

☑ **Auto Archive Training Records** – Automatically archive all training records and online course completions, including their attached forms, for users who have been deactivated for a specified number of months.

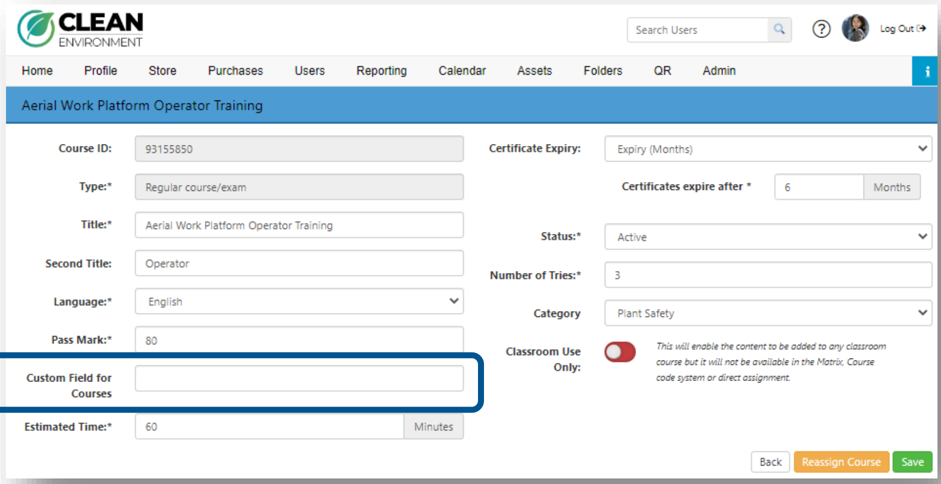
☑ **Auto Archive Expired Training** – Every month automatically archive expired training courses and records.

Assign Encryption Key

Refer to the *Encryption section* in the BIS Admin page.

Custom Fields for Online Courses

Allows you to add an additional field to describe your company's online courses (created using the **Online Courses** module).



Search Results

Users with access to the **Search** module may search for users using these additional search criteria.

- **Birthdate**
- **Company Role** – Based on training matrix.
- **Employee ID** – Requires the *Custom ID* features in your company settings to be enabled.

Social Insurance Number (Not Recommended)

Only by turning this on will a SIN/SSN profile field be added to your system. It allows administrators to add and update SIN/SSN to user accounts in their company portal. These fields will be hashed (***) and require a key code if *encryption* is enabled.

Verify Search Admin Record Uploads

Record Approvers (and *Evaluators if enabled*) will receive emails to approve or deny training records uploaded by users with the Search Admin system user role.

Username Format

Automatic Capitalization – Automatically convert the first and last names of users to title case (i.e., only the first letter of the name is capitalized).

Examples: *avery YOuNG* becomes *Avery Young*
Esme McRaney becomes *Esme Mcraney*

Click **Proper Format** to apply title case to all existing user first and last names.

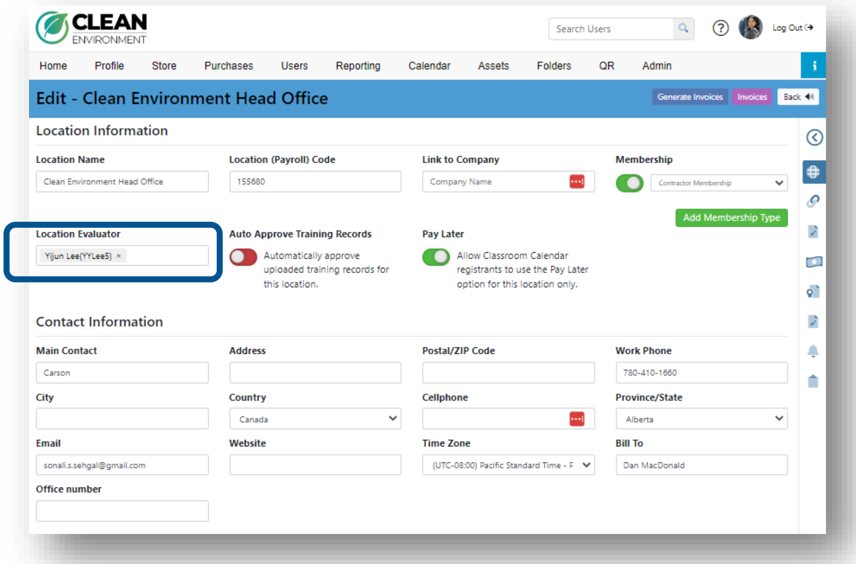
Auto Approve Training Record

Training records uploaded by users are automatically approved without verification from a Record Approver (or Evaluator) and displays in the Completed section of their Home page immediately.

Profile Picture Verification

Use a digital form to have Location Evaluators approve or deny profile pictures and driver's licence photos uploaded by users. If they are approved, the profile pictures and driver's licence photos are saved in users' profiles.

Location Evaluators are specified in the Location Details page of a location in your company structure (**Users** Administration page in your portal menu).



☐ **Delete driver's licence upload after profile picture is approved/denied** – If Location Evaluators approve or deny the uploaded profile picture or driver's licence photo, the driver's licence photo is deleted from the completed form and it is not saved in users' profiles.

☐ Disable Forgot Password Option

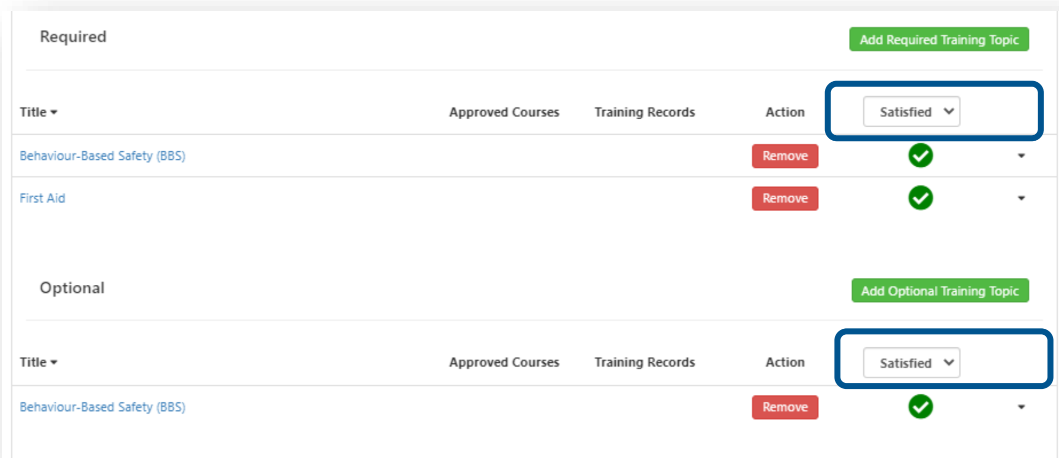
Users will be unable to select **Forgot** on the login page to receive an email with a link to reset their password. Users will have to contact their administrator or the Support Team to reset their password.

Allow User to Select Language

Please refer to the *Language Preferences* described above.

Training Topic Filter (User Account – Admin View)

When administrators access user accounts and expand the Users Home Tab section to view their training, the Required and Optional training will be filtered by default for satisfied training, unsatisfied training, or all training.



☑ **Required Training** section – set default filter to All

☑ **Optional Training** section – set default filter to All

Evaluators

All user profiles can have Evaluator 1 and Evaluator 2 fields to designate two individuals who are responsible for the user. These evaluators can approve or deny *training records*, forms, and other items associated with this user.

Provide a name for these evaluator roles.

- ☐ **Evaluator 1**
- ☐ **Evaluator 2**

Custom Help Contact Information

Please refer to the *Custom Help Contact* section above.

☐ Driver's Licence Validation Option

Only allow driver's licence fields to accept numbers and dashes (e.g., 132-45678) in form fields, the Driver Information Template, and profile fields.

Expiring Training/Document Period

Training records, course completion records, forms, and documents with an expiry date will have an *About to Expire* status that triggers a variety of actions by the system, such as:

- Expiring training in Reporting widgets will highlight in yellow.
- Expiring training in user profiles will highlight in yellow.
- Excel Reports will highlight expiring training in yellow.
- Users and certain managers and administrators can receive alerts when training is about to expire.
- Online courses, forms, and documents can automatically reassign to users when they are about to expire, so they can be recompleted and ensure all training requirements are always satisfied.

By default, training records, forms, and documents are deemed *about to expire* within 90 days of the expiry date. You can change when the system deems them *about to expire* by changing the advance notice period.

☑ **90 days** is recommended.

☐ Custom Company's Terms and Conditions

All users must agree to our Terms and Conditions to activate and access their accounts. You can add your company's terms and conditions to the bottom of the existing Terms and Conditions in English, French, German, Spanish, and Portuguese.

NOTE: Your company's additional Terms and Conditions can be read by users in your portal when they activate their accounts, from their profile page, and from the Terms and Conditions link in the footer of the system pages.

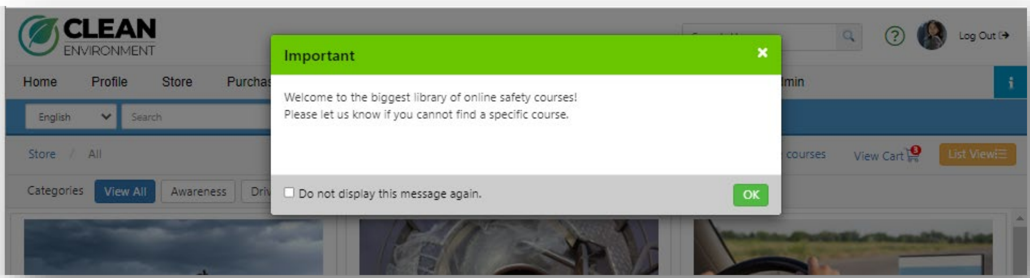
☑ Store Tab

If your portal includes an *E-Commerce Store*, users can click **Store** in the portal menu to search for and purchase online courses and physical products that you have allowed in your *e-commerce pool*.

All e-commerce stores can be made public by sharing the store link below.

Store Link – Use this link to add your e-commerce store to your company website. **Important:** You must contact our Support Team if you update this link, so that we can redirect all store access points in our system to the link you provided.

☐ **Message to E-Commerce Users** – Customize a pop-up message to all users who are logged in and click **Store** in your portal menu.



☑ Direct Users to Company Website

Many system notifications include a link to your portal's login page (*www.onlinelogin.ca*), so users can quickly activate their accounts and complete online courses, tasks, and forms. Instead of directing your users to the login page, you can direct them to your *company website* specified in your portal's General Information.

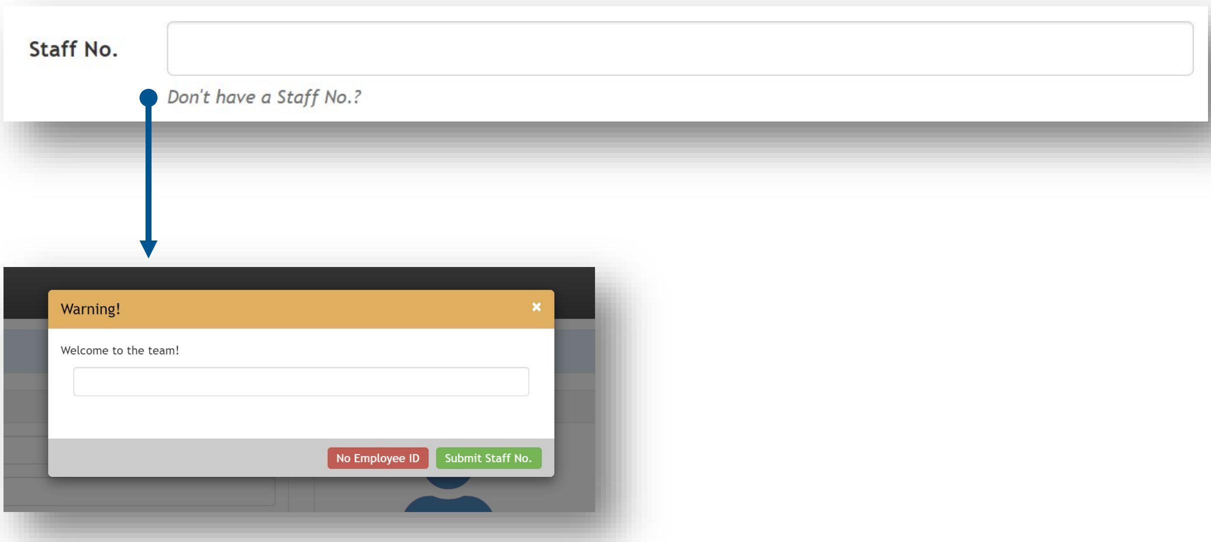
Custom ID

In your company's *[Profile Fields]* page, you can enable an *Employee ID* field. Instead of displaying *Employee ID* in user profiles and account pages, you can apply a company-specific label, such as *Staff No.* or *Agent ID*.

- **Required** – Makes this a required field when your administrators add new users to your portal.

- **Numeric ID Only** – Users can only enter numerical characters into the ID field.

Message – A *Don't have an Employee ID?* link will display beneath Employee ID fields. When users click this link, a pop-up appears to display your message and a text box for users to submit their ID number.



Read Only User Access to Employee ID

If the *Employee ID profile field is enabled and shown in profile pages*, give users read only access to employee ID. Only administrators who access user accounts may modify the employee IDs. We recommend this for any portals with *APIs* set up.

Continuing Education Units (CEUs)

Continuing education units help users track ongoing professional and learning development requirements. Some online courses have continuing education units assigned. A CEU field shows and continuously updates in user profiles based on the courses they complete with CEUs.

Mandatory Email Notifications (All Users)

All users must accept to receiving email notifications regarding their account in your portal.

User Training Summary PDF

Refer to the *Training Summary Report page* in your portal set up menu.

Unique Certificate ID

The system verifies that no certificate IDs are duplicated for uploaded training records.

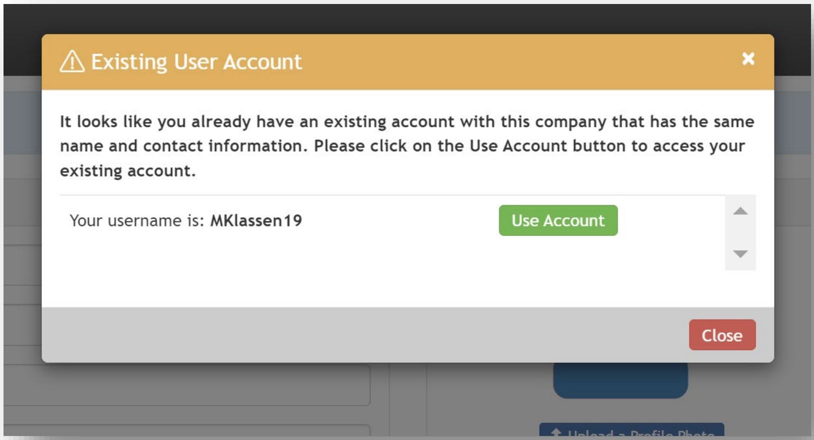
Purchase Order Requirement

When administrators create course codes using the **Course Codes** module, a required purchase order (PO) field is required. PO numbers are based on your company's PO system.

Use Existing User (Not recommended)

This feature helps you avoid having duplicate accounts in the same location in your company structure shown when you click **Users** in your portal menu. When users are creating and activating an account using a Location Code, if their first name, last name, and birthdate **exactly** match an existing active user account, they can access the existing account instead of creating a new one.

Important: Your portal must have the *birthdate profile field* enabled. We recommend that *encryption* is enabled for birthdates.



☐ **Allow Reactivation** – Any user who is using a location code to create and activate their account can reactivate an existing deactivated account as long as the first name, last name, and birthdate match.

☐ Hide Username and Password on Profiles

When users click **Profile** in the portal menu, the Username and Password fields will be hidden.

☑ New Courses Notification for E-Commerce Store

Sends a weekly eCOMMERCE STORE – ONLINE COURSE UPDATE SUMMARY email to the *E-Commerce Notifications contact* in your portal when new courses are added to your e commerce store.

Profile Fields

Please refer to your portal's *Profile Field* settings above.

Reporting Widgets Settings

Please refer to the *Reporting Widgets* settings above.

☐ Text Message Notification

You can send users with verified cell phone numbers in their accounts text messages containing:

- Activation codes

- Links to reset passwords
- Login information (username)
- New forms added to their accounts
- Verification codes to link accounts

NOTE: Text message notifications are separate from push notifications sent by the SafeTapp mobile app.

☑ Show Browser Information

When administrators view a user account, a browser section displays the browser type, version, and size, IP address, screen size, the date and time they last logged in, and if JavaScript, Java, or Cookies is allowed. This helps your administrators troubleshoot issues that users might be having when completing forms or online courses.

☐ Use Location as Company

When users create their accounts, they must select an existing location from your company structure (shown when clicking **Users** in your portal menu) in the *Company* field. Their account will be added to the location they select.

When this feature is disabled, users may enter and select from an available list of companies that they are employed with. If their company is not an available option, you can customize a message to provide them with directions.

☑ System Updates Module

A **System Updates** module will be available to all users with access to the **Admin** page in your portal menu. This module provides important updates about new features for specific areas of your portal, such as Forms, Classroom Calendar, and Assets. We also provide important notices about system maintenance that may temporarily impact system performance and access.

☑ **Email Updates** – All new users will receive emails about system updates by default. Users can opt-in and opt-out of receiving system updates by email from within the System Updates module at any time.

To enable or disable emailed updates to all users in your portal, click **Enable All** or **Disable All**.

Refund Warning

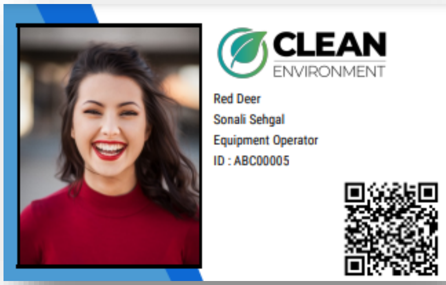
If your users contact our Support Team to request a refund, you can customize and display a pop-up message to let our Support Team know of any specific requirements, such as redirecting users to your company contact, before processing the refund.

Backdate Completed Tasks

Administrations with access to the Task Administration module may backdate completed tasks.

ID Badge

You can customize a default ID badge for all users in your portal that they can print from their Profile pages. To generate and print ID badges, you must turn on the *ID Photo Upload* feature.



☑ **Use Employer Name** – The badge displays the user's company name indicated in their Profile.

☐ **Lock Profile Image** – Users cannot update or change their profile image after it has been uploaded.

☐ **Hide Company Logo** – Your company logo uploaded in your portal through the *Branding Settings* will not be shown on ID Badges.

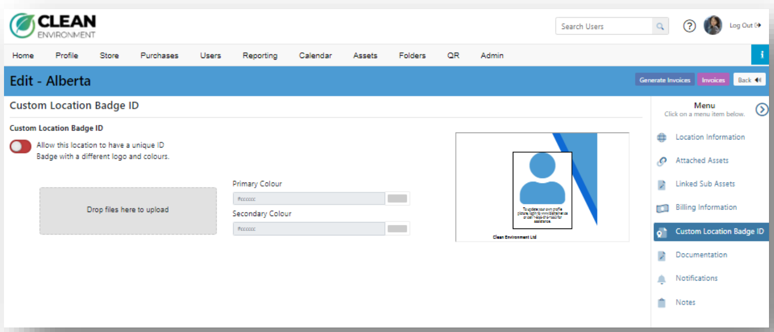
☐ **Hide Company Role** – Hides users' company role from their ID badges.

☐ **Display Driver's Licence** – Displays users' driver's licence numbers on their ID Badges. **NOTE:** Driver's *[Licence encryption]* must be disabled to display driver's licence numbers on ID badges.

☑ **Add Company Location** – Includes the user's location in your company structure shown by clicking **Users** in your portal menu on ID badges.

☑ **Badge Orientation** (Portrait recommended) – Choose a portrait (vertical) or landscape (horizontal) format for your ID badges.

Helpful Tip: *You can customize unique ID badges for specific locations in your company structure through the Location Details page.*



System Modules

☐ Training Record Management System (TRMS)

☐ **Custom Training Provider Label** – Providers of online or classroom courses can have a custom label in your portal, such as *Training Company*.

☑ **Automatic Completion** – When a training record is uploaded for an online course/exam, the course/exam is moved to the Completed section of user profiles immediately.

☑ **Allow Users to Upload Certificates** – Users may upload their own course completion certificates to training records that administrators have added to their accounts.

☐ **Allow User to Add Training Providers** – When users upload training records, they may add new training providers if the training provider for the training record is not available in the auto-generated list.

☐ **Allow User to Add Course Under Provider** – Your TRMS lists all the training providers in your system and the courses each training provider can deliver, which can be external courses or their own courses. When users upload training records, they can add new courses under a training provider if it doesn't currently exist.

☐ **Send Required Course Report** – Users with Client Admin system user roles will be emailed a monthly Required Course Report.

☑ Training Matrix

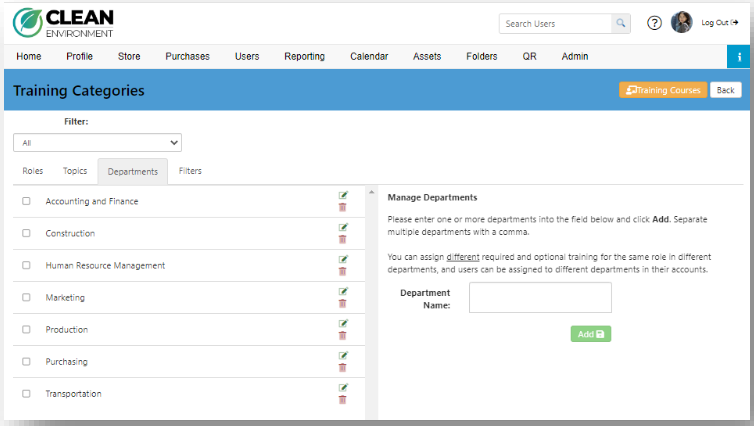
☑ **Training Matrix Notifications** – Notify individuals by email whenever your portal's training matrix is updated using the *Email Addresses* field. We recommend this be turned on only **after** your training matrix is finalized.

☑ **Course Decommission Notification** – Notify individuals (or Client Admins by default) when courses for training matrix topics are decommissioned or removed.

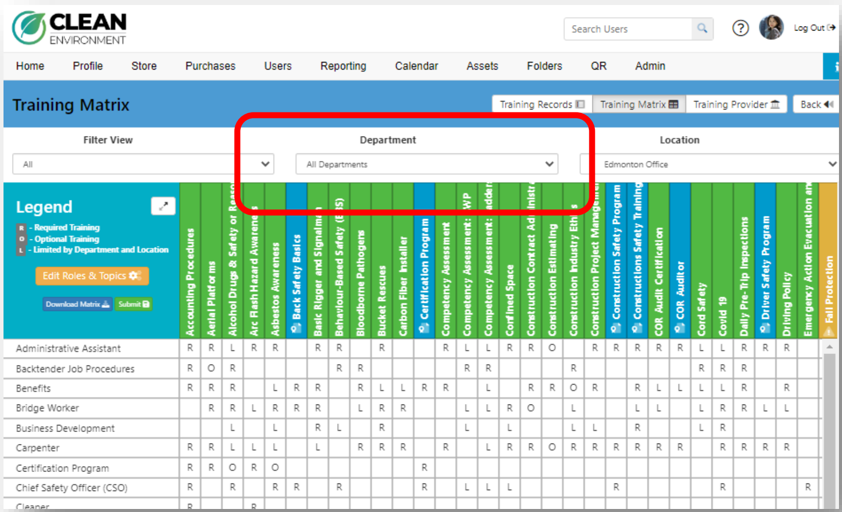
☑ **Training Matrix Lock** – Enter a lock code to prevent unauthorized access to your training matrix after it is finalized.

☐ **Departments** – Departments help you manage <u>different</u> training requirements for users with the same company role in the same location of your company structure shown by clicking **Users** in your portal menu.

- Set up departments that your locations may have.



- Set up required training for the same company roles in different departments.



- A Department list is added to user accounts for administrators to complete.

☑ Allow Users to Upload Records

Users may upload their own training records, which may need to be approved by a Record Approver or *Evaluator* depending on your settings.

☑ **Require Certificate** – Users must attach a completion certificate when adding a training record to their account.

Enable Course ID – Allow users to type in a Course ID and select from a list of available course options. If **Enable Course ID** is disabled, users must select a training provider and a course the training provider offers to generate the Course ID.

Folders

Your company can organize and distribute documents, forms, and courses to users in your portal. You can assign and restrict access to folders by users in your portal.

- Set up and manage the Folders module by clicking **Admin** in your portal menu and clicking **Folders**.
- Users can access your company's folders and their contents by clicking **Folders** in the portal menu.

Assets

You can enable an asset management system to track all your company assets, including their supporting documentation, and assign them to your users, locations, and other assets.

- Click **Edit** to change your Asset Management System label, such as *Equipment*.
- Set up and manage your Assets module by clicking **Admin** in your portal menu and clicking **Assets**.
- Users can view assets in their location by clicking **Assets** in the portal menu.
- Location details show assets assigned to locations.

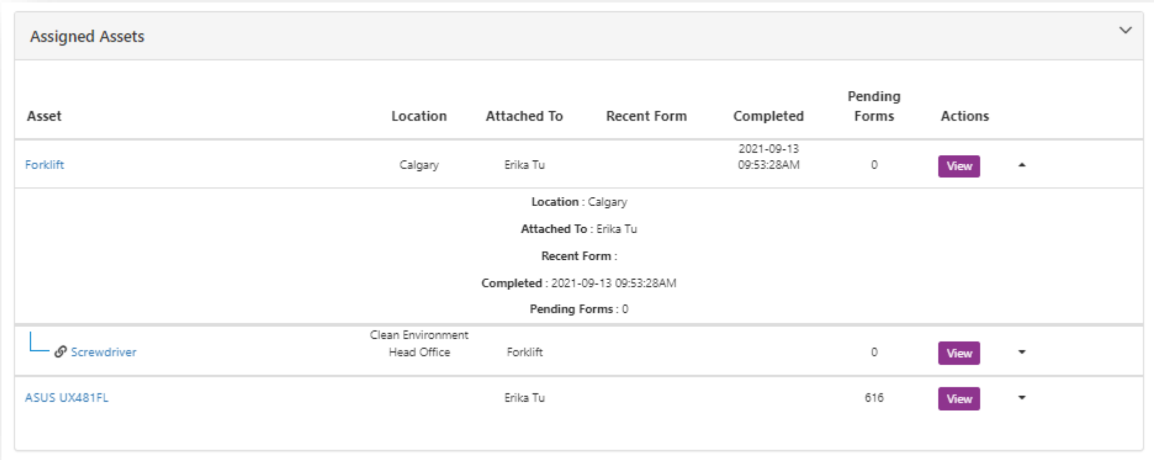
Allow Unrestricted Access with QR Scan – Allows any user to scan asset QR codes to view and update them regardless of location permissions or qualified personnel status.

Limit forms to Qualified Personnel – Only users designated as qualified personnel may complete forms assigned to an asset.

Form Settings – Allow users to view and update open forms associated with an asset they are evaluating. **Note:** This setting will eventually be removed and left on by default.

☑ **Display Pending & Completed Forms** – In the asset dashboard, allow all users to see all pending and completed forms for an asset. Otherwise, users can only see forms they are completing or have completed. **NOTE:** Users designated as qualified personnel under each asset can always see all pending and completed forms.

☑ **Display Asset in User Profiles** – In an Assigned Assets section in their Profile page, users can see the company assets assigned to them, including assets assigned to those assets and any pending forms the asset may have.



Assigned Assets

Asset	Location	Attached To	Recent Form	Completed	Pending Forms	Actions
Forklift	Calgary	Erika Tu		2021-09-13 09:53:28AM	0	View
Location : Calgary **Attached To** : Erika Tu **Recent Form** : **Completed** : 2021-09-13 09:53:28AM **Pending Forms** : 0						
Screwdriver	Clean Environment Head Office	Forklift			0	View
ASUS UX481FL		Erika Tu			616	View

☐ **Allow Assign/Unassign Button in Assets** – Allows admins and managers to unassign assets from and assign assets to users they have access to. (If turned off, managers can only assign assets to their users if the asset is not already assigned. Only Asset Managers, Senior Asset Managers, and admin roles can unassign assets.)

☐ Classroom Calendar

Please refer to the Classroom Calendar settings guide.

Excel Reports

Enable a variety of Excel Reports that our system can generate. Please refer to the *System Excel Reports Guide* for a description of each report.

NOTE: Encryption key codes are required to generate and download reports containing SIN/SSN, birthdates, or driver's licence numbers.

Check the box next to reports that you want to make available to users with Excel Learner roles.

- ☐ Asset Summary Report
- ☐ Billable Classroom Summary
- ☐ Billable User Report
- ☐ Certification Program Report
- ☐ Certification Program Summary Report
- ☐ Classroom Calendar Report
- ☐ Classroom Calendar Summary of Training Events
- ☐ Classroom Course Result Report
- ☐ Classroom Registrant Purchase Report
- ☐ Classroom Registration Report
- ☑ Complete Online Course Status Report
- ☑ Course Completion Report
- ☑ Course Completions Across All Companies
- ☐ Custom Payment Gateway Report
- ☐ Deactivated Users Report
- ☐ Driver Information Report
- ☑ E-Commerce Purchase Report
- ☐ Exam Results Report
- ☑ Expired Courses Report
- ☑ Expiring Course Summary Report
- ☐ Feedback Answers
- ☐ Form Status Report
- ☑ Individual Online Course Completion Report
- ☐ Location Summary Report
- ☐ Matrix Summary by Location and Filter
- ☐ Matrix Training Requirements by Location
- ☐ Members Report

- ☐ Membership Purchase Report
- ☐ Month End Report
- ☐ Network Course Report
- ☑ Online Course Completion Report
- ☑ Online Course Status Report
- ☐ Advanced Search Report
- ☐ Regular Course Answers by Percentage
- ☐ System Manager and Admin Role Report
- ☐ System Usage eSafety Report
- ☐ Task Administration Report
- ☐ Training Gap Report
- ☐ Training History Report
- ☐ Training Hour Report
- ☐ Training Matrix High-Level Summary
- ☐ Training Matrix Details Report
- ☑ Training Matrix Summary Report
- ☐ Training Record Report
- ☐ Training Requirement Report
- ☐ User Activation Report
- ☑ User Information Report
- ☐ User Information Request Report
- ☐ User Summary Report

☐ Driver Information Management

If your company has approved drivers, you can set up a driver information management system to maintain and track important driving-related documents in user profiles.

Driver Types

☐ **Driver Types** – Create different types of drivers, such as Class 1, Class 3, or Class 5 drivers, that can be assigned to users.

☐ **Display in Reporting** – Driver types is now always shown in the Driver Information Report.

Notifications

You can give users advanced notice when certain driving documents that have **Reminders** checked are about to expire. Please see below for more information on driving documents.

Helpful Tip: *You can set the* expiring period *for courses, forms, and driving documents in your company settings. By default, it is 90 days in advance of the expiry date.*

☑ **Email User** – Send users a monthly notification when they have expiring driving documents.

☐ **Email User's Manager** – Users with Reporting Manager, Manager, Senior Reporting Manager, and Admin Managers receive notifications when users in their portal have expiring driving documents.

☐ **Email Client Admin** – Client Admins receive notifications when any driving documents are about to expire.

☐ **Company Approved Driver Notification** – Send a notification to specified email addresses when a user is no longer a company sanctioned driver. You designate users as company-sanctioned drivers within their user accounts.

☐ You can also specify additional email addresses to receive notifications about expiring driving documents.

Click **Manually Trigger Email Notification** to immediately trigger a notification about expiring driver documents to users based on the selections made.

Document Type

You can add different types of driving documents, such as driver's abstracts, driving assessments, and vehicle use agreements that apply to specific types of drivers.

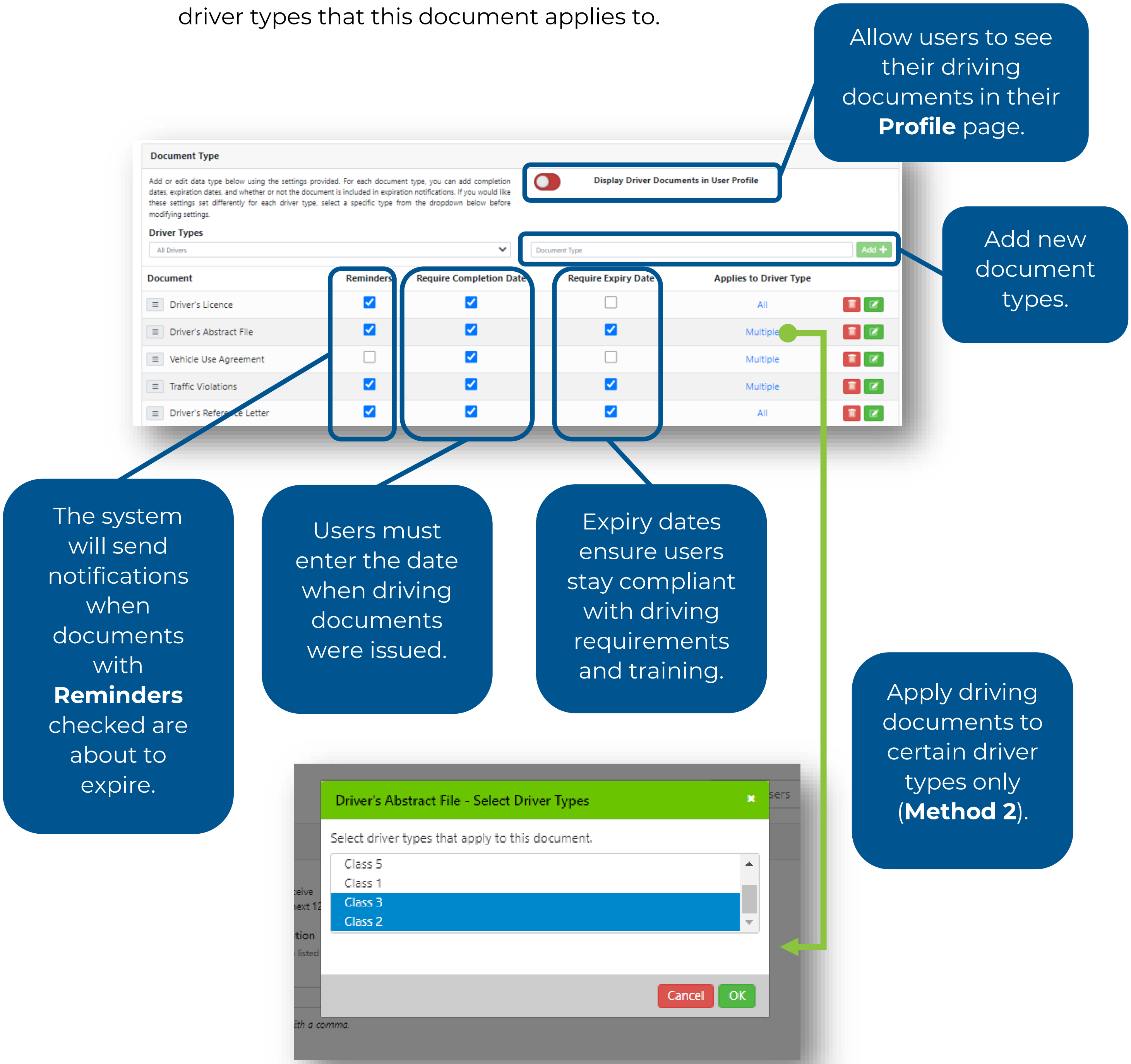
You can apply driving document requirements to specific types of drivers in two ways:

Method 1: Use the *Driver Type* drop-down menu and select a type.

a. Under the Apply to Driver Type column, check all required documents.

Method 2: Select All Drivers in the *Driver Types* drop-down menu.

b. Under the Apply to Driver Type column for each document, select the driver types that this document applies to.



☑ Training Dashboard

The Training Dashboard module allows you to visually monitor live the performance of your online and classroom courses being purchased and completed.

The dashboard allows you to:

- Filter for specific courses.
- Compare the performance of courses between the current period and the past period of the same duration.
- Display information in a bar or line graph.
- Quantify metrics on a daily, weekly, monthly, quarterly, or yearly basis.

You can select from the following reports:

☐ **Classroom Events Scheduled** – Shows how many classroom courses are scheduled.

☐ **Classroom Students** – Shows how many participants are registered in classroom courses.

☑ **eCommerce Sale** – Shows you the quantity of courses purchased, or the total purchase cost of courses sold from your e-commerce store.

☑ **Non-Owned Courses Sold** – Shows the number of courses owned by other companies that you sell.

☑ **Online Course Completion** – Shows the number of internal and external online courses completed by users in your portal.

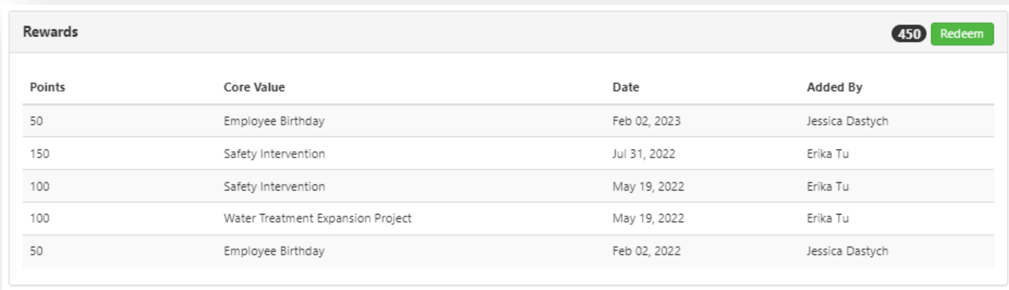
☑ **Owned Courses Completion/Sold** – Shows the number of completions for courses you own that are sold from your store or by a sub client.

☐ Reward Tracking System

Enable an employee recognition tool in your system using the **Rewards** module from your **Admin** page in your portal menu.

Recognize employee contributions by:

- Adding points to user accounts when they demonstrate your company's core values or complete certain forms and online courses.
- Scheduling points based on their years of service, their birthdate, or a special event date.
- Creating a company rewards catalogue, containing merchandise, entertainment, or other benefits, that users can select to redeem their reward points.



Rewards 450 Redeem

Points	Core Value	Date	Added By
50	Employee Birthday	Feb 02, 2023	Jessica Dastych
150	Safety Intervention	Jul 31, 2022	Erika Tu
100	Safety Intervention	May 19, 2022	Erika Tu
100	Water Treatment Expansion Project	May 19, 2022	Erika Tu
50	Employee Birthday	Feb 02, 2022	Jessica Dastych

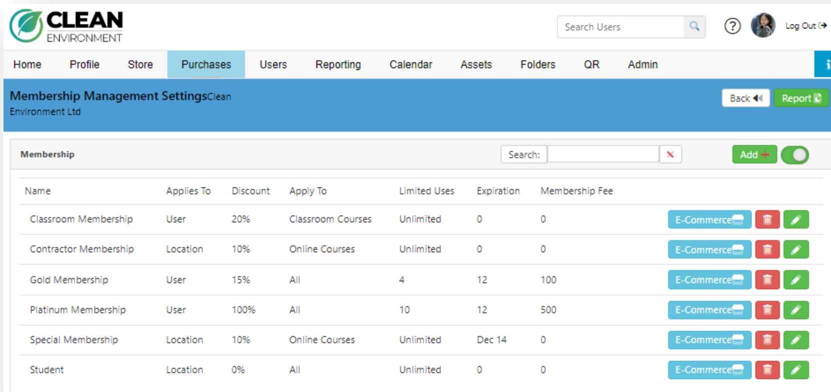
Membership Management

You can create memberships that provide discounts to online courses, classroom courses, or both. This module is reserved for resellers and content owner resellers.

- When new users are added, check **Member** on the Account Creation page to indicate they are part of a membership.
- Location-limited memberships - Only users in certain locations in your company structure receive the discount, and when users are added to these locations, they are automatically given the discount.
- Set expiry dates for memberships.
- Allow memberships to auto renew.
- Set a membership fee.
- Create unique membership numbers for each user.
- Sell memberships on your e-commerce store.

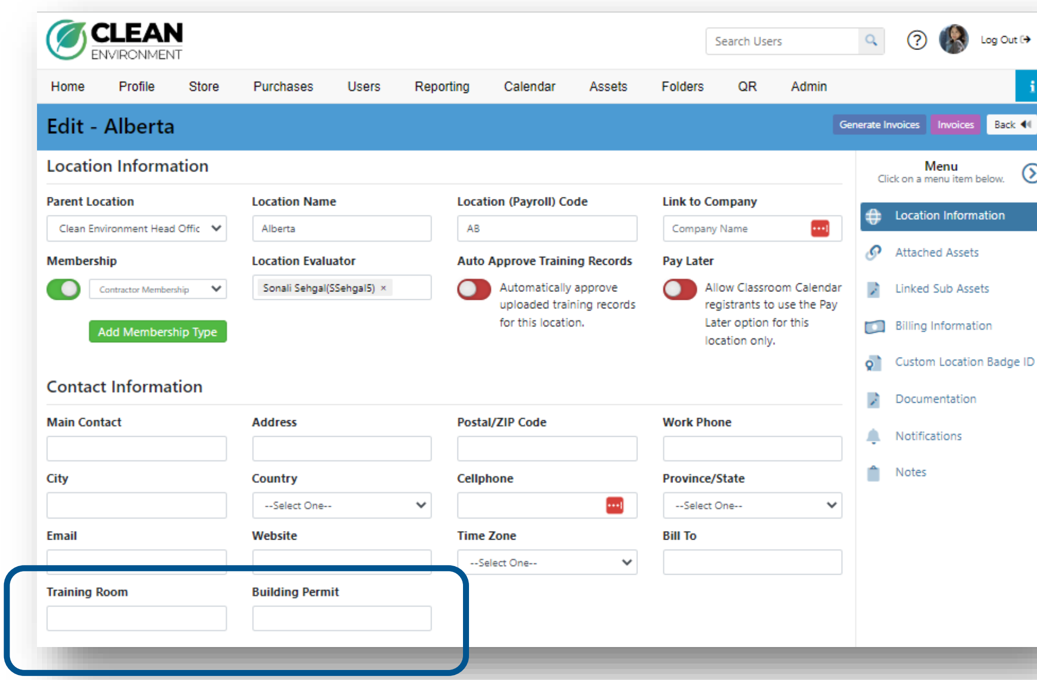
In this section, you have limited access to add, view, and deactivate your memberships.

Helpful Tip: *Add, edit, and manage your memberships directly from the Membership module by clicking* Admin *and* Membership.



Custom Fields for Location Information

For each location in your company structure shown by clicking **Users** in your portal menu, you can add location information fields, such as Training Room or Building Permit.



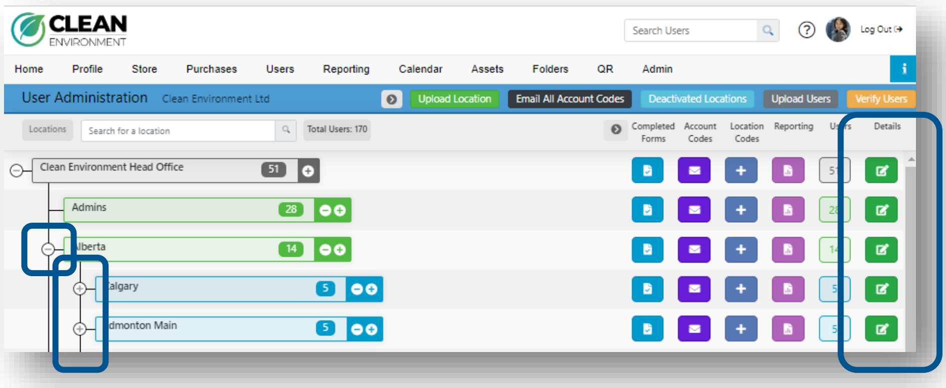
☑ New Course Added to E-Commerce Store Notification

Send a notification to the email addresses specified here whenever new courses are added to your portal's e-commerce store.

☐ Condense Company Hierarchy

Your company structure where you manage your users is shown on the User Administration page by clicking **Users** in your portal menu. By default, all locations and sublocations are expanded, and you can drag and drop locations anywhere in your company structure.

If you have hundreds of locations and sublocations, you can condense your structure to only show the highest levels. To move locations, click the **Edit** icon and within the Location Details page, update the *Parent Location* field.



☐ QR

QR allows any users to scan asset QR codes using their device's camera to pull up information about your company's assets. Users with Record Validator roles may scan QR codes on ID badges to view and verify training information. Users must allow our system to access their camera.

☐ Documents in User Accounts

Administrators and managers who can access user accounts can upload employee documents in a Documents section. These documents are hidden from users when they view their own profiles.

☑ ID Photo Upload

Your users can upload a profile picture and print an ID badge by clicking **Profile** in the portal menu. When this feature is enabled, you can customize a default *ID badge* for all users in your portal and unique ID badges for users in specific locations. **Note:** Major updates for this feature is in progress.

☐ Physical Product Orders

Using the Physical Products module, you can sell your company's physical products to your users and make them available on the network for other companies to sell on their e-commerce stores.

☐ Forms

You can create, assign, and schedule any number of digital forms for your users in your portal for a variety of purposes.

1. **Complete forms for themselves** – E.g, Federal tax forms, company agreements, or surveys
2. **Complete forms on other users** – E.g., annual performance forms and knowledge assessments
3. **Complete forms on assets** – E.g., maintenance and inspections forms

☐ **Form Notifications** – Sends notifications to the email addresses listed whenever a form is completed in your portal, which includes a link to and/or PDF copy of the form.

☐ **Form Reassignment Notification** – Sends notifications to the email addresses listed whenever a form is reassigned to another user.

☑ **Required Fields Missing Pop-up** – When users submit a form without completing all the required fields, a pop-up message requests they complete them. This feature will be removed in the future and always enabled.

☑ **Task Administration** – Turn on the Task Administration module, which allows users to assign tasks to other users in the system from the module or from a form they're completing. This toggle will be moved from the Forms section to its own section in the future.

- ☐ **Task Reassignment** – Allow users to reassign their tasks to other users in your portal.

- ☑ **Advanced Task Notifications** – Users receive an email notification when they are assigned a task for a form. They may be able to view a copy of the completed form if the settings of the specific form allow it.

- ☐ **Schedule Form Block-Out Date –** You may schedule dates to block the system from assigning scheduled forms to users and assets.

☐ Invoice Management

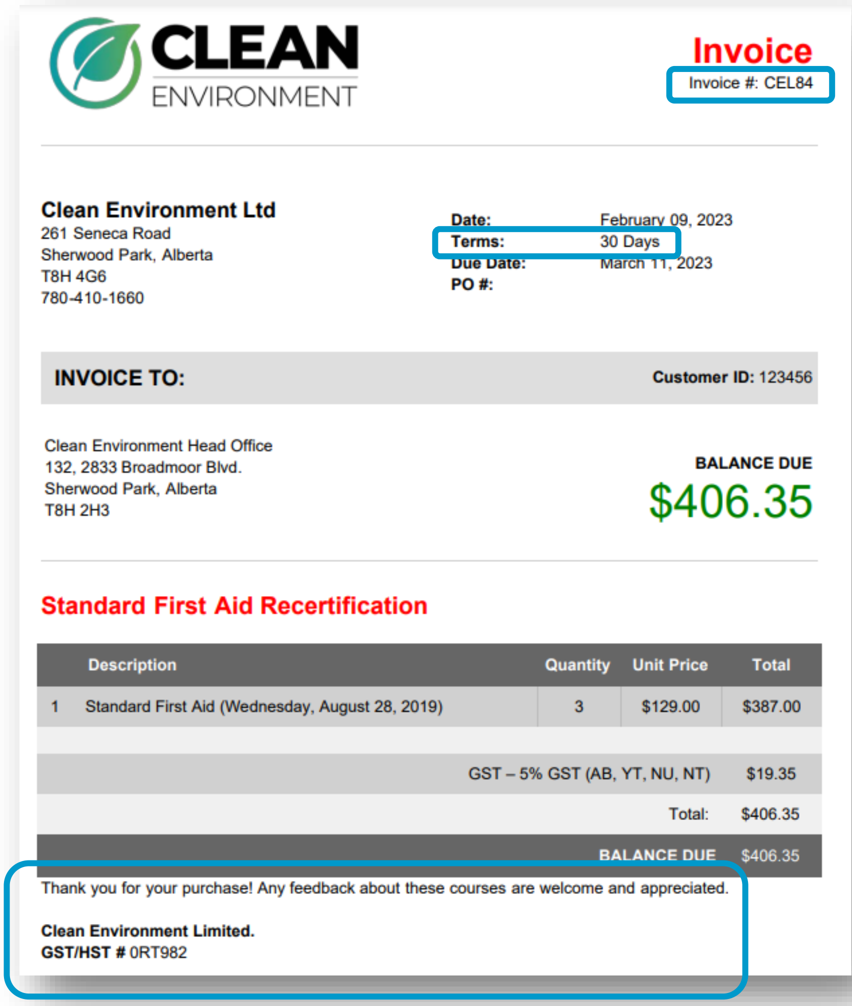
The system can generate invoices for purchases made by users that by default, display your company information under *Company Information*, user's company information from their profile, and information added here, such as your company's legal name, GST/HST number, and QST Registration number. If you do not fill in the information below, you may need to fill it out manually each time an invoice is created.

- ☐ **Invoice Number Format** – You can set an invoice number prefix.

- ☐ **Payment Terms** – You can set the default payment terms for your company. When creating individual invoices, this can be changed to a variety of options such as, 7 days, 15 days, and *On Receipt*.

- ☐ **Email Settings** – You can customize a message when invoices are emailed to your clients and users.

- ☐ **Customer Message** – You can customize and add a message to the bottom of invoices.



CLEAN ENVIRONMENT

Invoice

Invoice #: CEL84

Clean Environment Ltd
261 Seneca Road
Sherwood Park, Alberta
T8H 4G6
780-410-1660

Date: February 09, 2023
Terms: 30 Days
Due Date: March 11, 2023
PO #:

INVOICE TO: **Customer ID:** 123456

Clean Environment Head Office
132, 2833 Broadmoor Blvd.
Sherwood Park, Alberta
T8H 2H3

BALANCE DUE
$406.35

Standard First Aid Recertification

	Description	Quantity	Unit Price	Total
1	Standard First Aid (Wednesday, August 28, 2019)	3	$129.00	$387.00
			GST – 5% GST (AB, YT, NU, NT)	$19.35
			Total:	$406.35
			BALANCE DUE	$406.35

Thank you for your purchase! Any feedback about these courses are welcome and appreciated.

Clean Environment Limited.
GST/HST # 0RT982

Custom Headers on Home Page

By default, the online courses and forms are organized into five sections on the home page of users. You may customize the default names of these sections.

- **Assigned** – Courses, forms, folders, and tasks assigned to users from administrators.
- **In Progress** – Courses and forms users have started but haven't completed.
- **Required** – Courses and training records required for users' company role based on your company's training matrix.
- **Optional** – Courses and training records considered for optional for users' company role.
- **Completed** – Courses and forms the user have completed, which may include unsuccessful tries.

☑ Notification for Legacy Browsers

You can display a pop-up message to users who are logging into your portal using an outdated internet browser, such as Internet Explorer 11. You can view what computer requirements we recommend by clicking **System Requirements** in the footer of your portal. This option will be removed in the future.

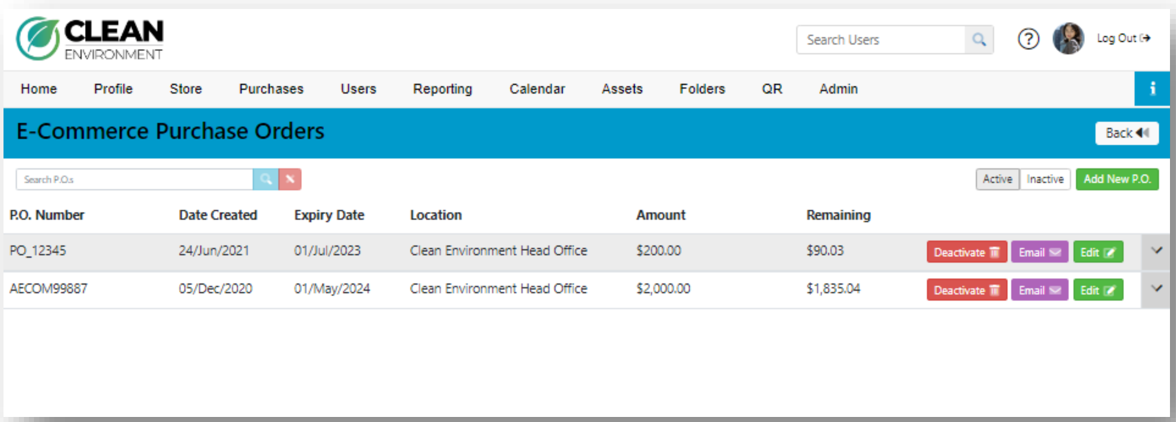
☐ **Login Button** – Include a login button in the pop-up message, which allows users to continue logging in with the existing browser.

☑ Login Link on Account Creation Page

When users activate and set up their account using a course code, location code, or activation code, a login button will allow them to log into an existing account instead.

☐ Purchase Order Management

The E-Commerce Purchase Orders module allows you to create, email, and manage purchase orders (POs) based on POs your company issues. The available PO amount automatically adjusts for all classroom and online course purchases made with PO numbers.



If this module is turned off, users cannot pay for online courses using purchase orders, but fields may exist to indicate your company PO numbers for reference only.

☐ Display Contact Details in Reporting

Please ignore this feature, which is no longer required after various updates to our system. It will be removed.

☑ Project Management

The Project Management module allows you to create a collaborative project workflow process where tickets are created, assigned to different departments, and progressed along a different work stages (boards). If we develop and implement any system upgrades for your company, your company administrators can view progress of the update from conceptual design to implementation.

E-Commerce Store Panel

You can measure the web traffic on your *e-commerce store* using Google Analytics.

- ☐ **Google E-Commerce Tracking** **(Required for web traffic monitoring)**
- ☐ **Google Analytics** – Use your company's Google Analytics account and enter your account ID (e.g., UA-XXXXXXX).
- ☐ **Google Tag Manager** – (Optional) Use your company's Google Tag Manager account and enter your account ID.

☑ Advanced Search

Administrators in your company can search for users and view their training records using a variety of search criteria, including *custom profile fields* that your company has set up.

- ☐ **Public Link** – Provides a public link where the public can search for users in your portal using criteria that you allow, such as training topic.

  We recommend the following advanced filters (search criteria):

  - ☑ **Courses**
  - ☐ **Province or State**
  - ☑ **Training Topic**
  - ☐ **City**
  - ☑ **Location** – Location in your company structure (click **Users**.)
  - ☑ **Role** – Company Role
  - ☐ **Birthdate**

- ☐ **Company Approved (Sanctioned) Driver**
- ☐ **Status** – Course Completion Status
- ☐ **Custom Profile Fields** – Unsecured *custom profile fields*

☑ Company Role in Profiles

Allows users to see the company role assigned to them by clicking **Profile** in the portal menu. By default, only administrators can see the company role assigned to users.

- ☐ **Write Access** – (Not Recommended) Allow users to change their own company role. If users change their own company roles, their required training also changes based on your training matrix. They may also access digital folders which are restricted to certain company roles.

- ☐ **Required** – Make company role a required profile field.

☐ Block Company Training Records from SafeTapp Validation

SafeTapp users outside your company with Record Validator roles, such as government officials, cannot view the training records of your users when they scan your users' QR codes on their ID badges or enter their User ID numbers and last names.

☑ Block Private Training Records from SafeTapp Validation

Internal online courses that are NOT approved for the network and training records set as Private cannot be viewed by SafeTapp users with Record Validator roles.

☐ User Training Request

If either **User Online Course Training Request** or **User Classroom Event Request** is turned on, the **User Training Request** toggle will be turned on.

- ☐ **User Online Course Training Request** - Allow users to request online courses by clicking **Request Training** from their Home page.

- ☐ **Auto Approve Subscription Courses** – If users request a course that's in your portal's subscription package, it is automatically added to their accounts.

- ☐ **User Classroom Event Request** – Users can request a classroom course if it is not currently offered on your classroom calendar by clicking **Request Classroom Training** in your Calendar.

You can allow certain users to approve training requests:

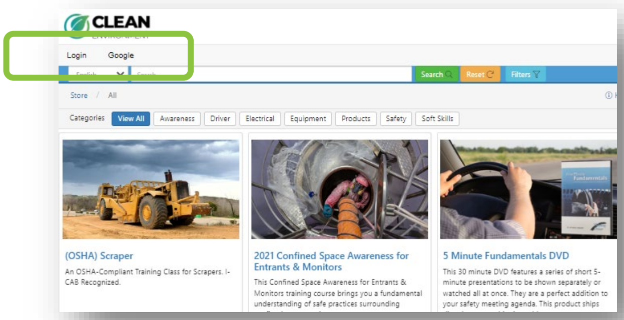
- Manager/Location Admin
- Evaluator 1
- Evaluator 2
- Location Admin Only

Summary Email for Evaluators

You can schedule a monthly or weekly email summary for *evaluators* that shows the training requirements for all users reporting to them.

Navigation

You can customize links in the header of your public e-commerce store. This is also included in your company *Branding* settings and typically used by portals selling courses.



Course Pool

Please refer to the *Course Pool* section above.

Notes

The Notes provides an important audit trail of actions and modifications made to your portal. You may also add specific notes manually.