Training

#11.1 — Last update: Jan 24, 2024

Interfacing Technologies Corporation

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1. User Manual for Training Application

The objective of this manual is to assist users with the usage of the **Training** application.

2. Technical Support

For help and technical advice, please contact the Interfacing Technical Support department. In North America, the department is open Monday-Friday from 7:00 AM to 5:00PM, Eastern Time.

Phone: +1 514 737 7333
Email: support@interfacing.com
Live Chat: interfacing.com

Online technical support and worldwide contact information are available at www.interfacing.com

3. Legal Notices

Disclaimer

4. Release Notes 11.1

In our latest release of the **Training** application, we have introduced new features, improved existing ones, and revamped the user interface.

Product	Version	Date
Training Application	11.1	2023/09/19

In these notes, you will find:

1. New Features
2. Feature Improvements

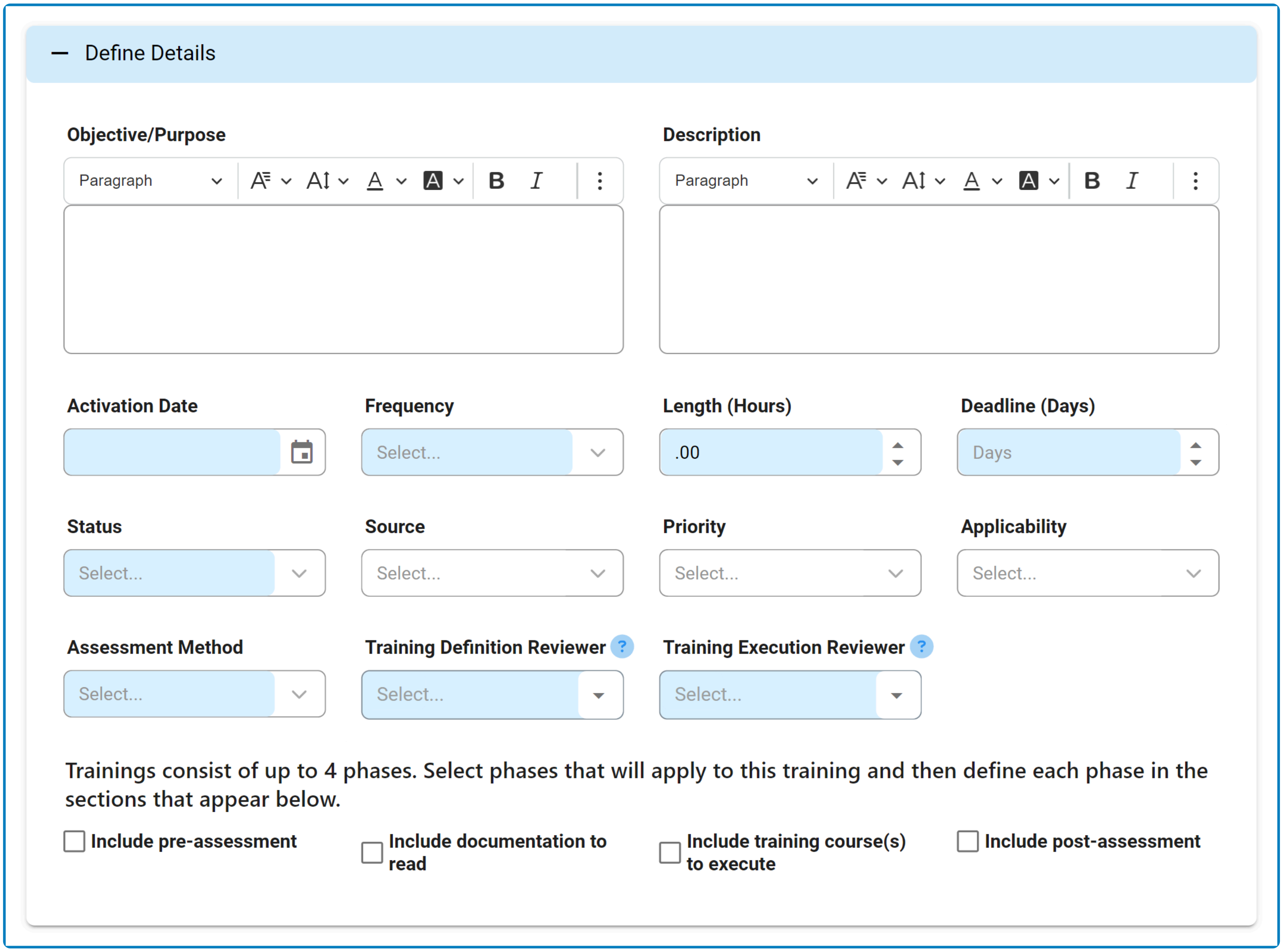
4.1. New Features

With this latest release, we have introduced the following new feature:

1. New Training – Workflow Assignment Control

4.1.1. New Training – Workflow Assignment Control

We have added two new dropdowns to the New Training form, granting users more control over workflow assignments.



1. ***Training Definition Reviewer:*** This is a multi-select dropdown field that retrieves the list of users, roles, and groups in the system. It allows for the selection of the user(s), role(s), and/or group(s) responsible for reviewing the training.
    - During the Define Trainings workflow, the individual(s) selected in this dropdown will be assigned the Review Training Definition task.

2. ***Training Execution Reviewer:*** This is a multi-select dropdown field that retrieves the list of users, roles, and groups in the system. It allows for the selection of the user(s), role(s), and/or group(s) responsible for handling extension requests and reviewing the training execution.
    - During the Conduct Trainings workflow, the individual(s) selected in this dropdown will be assigned the New Extension Request task (if an extension is requested) and the Sign Off

Training Completion task.

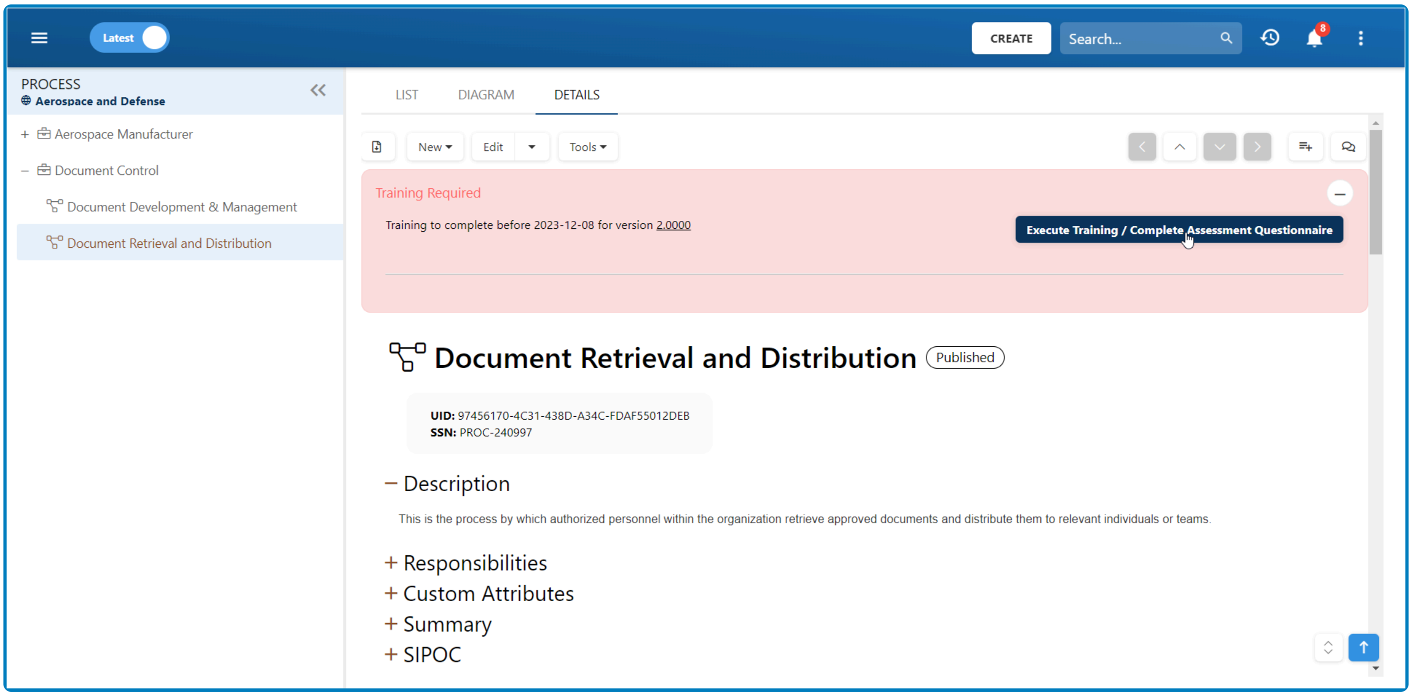
! Users, roles, and groups are retrieved from from the Organization Management (Admin) module of the **Admin** application.

These new additions enable efficient workflow management within the **Training** application. By facilitating precise task assignments tailored to the needs of each training, they guarantee the involvement of the right stakeholders at each workflow stage. This stands in contrast to the previous uniform task assignments, which were set at the application level.

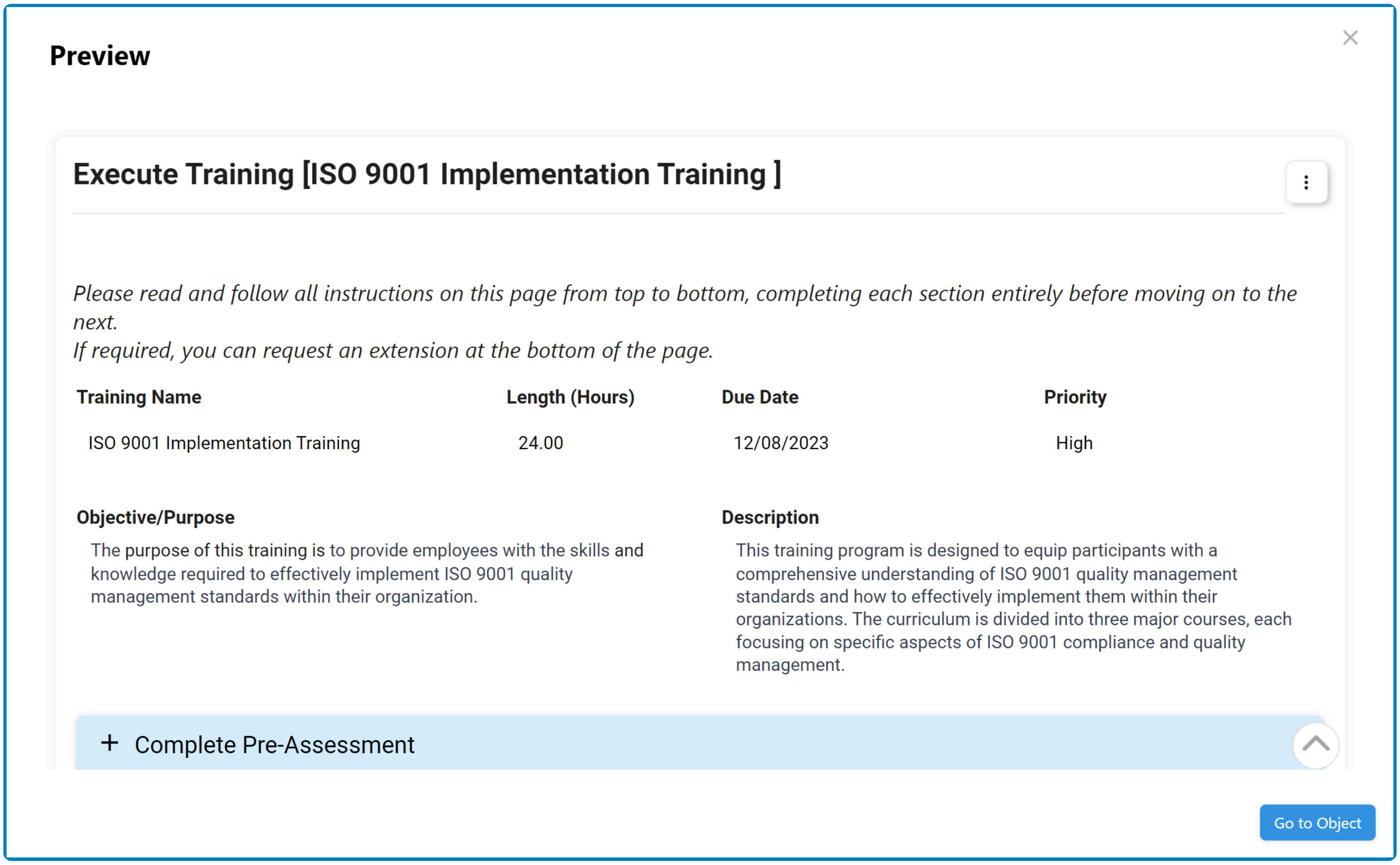
4.1.2. Training Completion in EPC

Users can now access and complete assigned EPC documentation-related trainings directly within the EPC interface, eliminating the need to navigate outside the platform.

To complete a training, along with any associated pre- or post-assessments, simply click on the **Execute Training/Complete Assessment Questionnaire** button for the assigned EPC object.



This action triggers the display of the Preview window, featuring the Execute Training form from DBP.



! For added flexibility, users also have the option to open the Execute Training form in a separate browser tab in DBP by clicking the **Go to Object** button in the Preview window.

Please note that the upcoming release will feature a wider EPC screen for improved usability.

4.2. Feature Improvements

What's Been Improved?

With this latest release, we have implemented the following improvements:

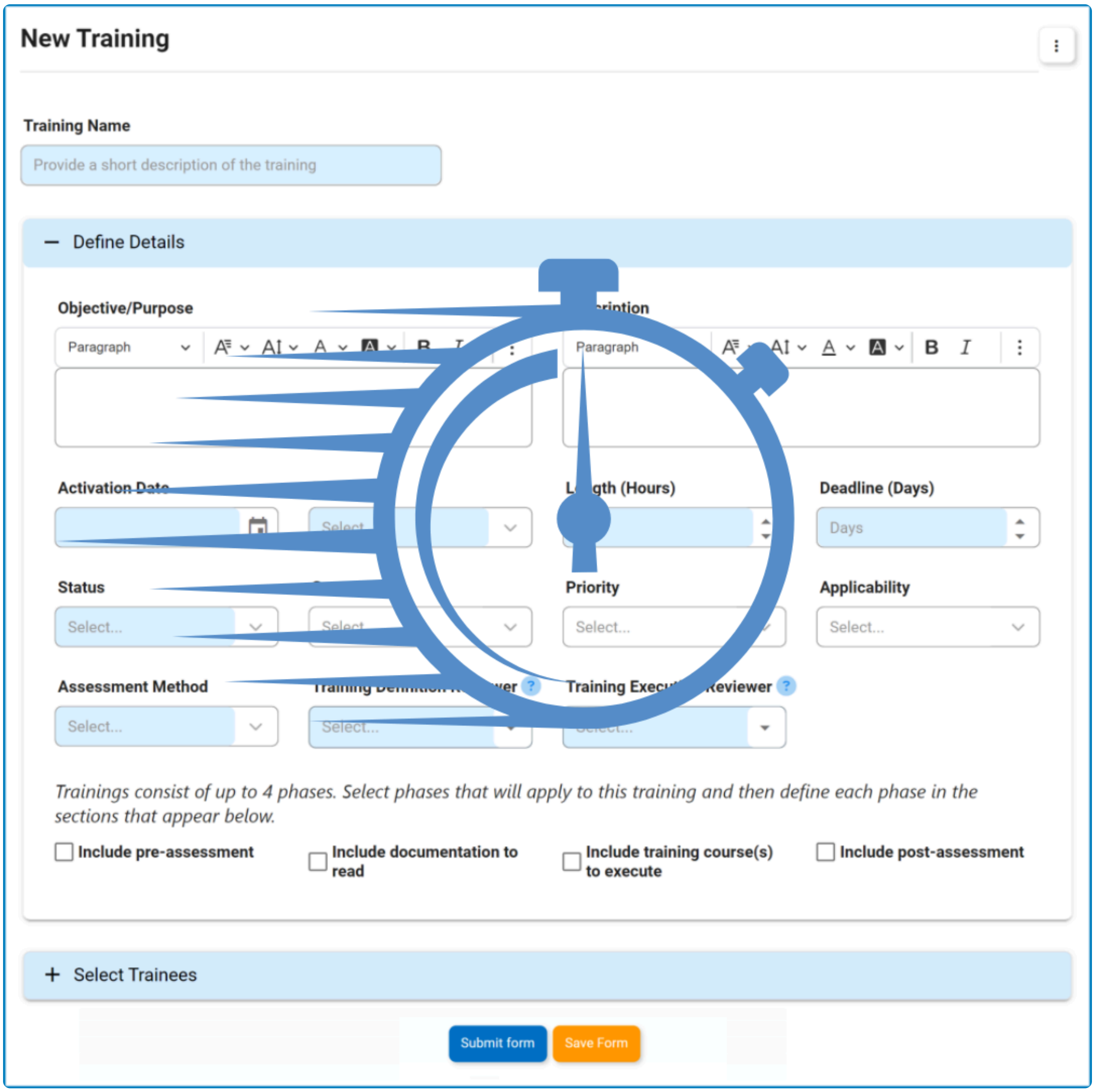
1. Enhanced Implementation of Score Assessment Method
2. New Training – Enhanced Training Content Management
3. New Training – Automatic Version Display for Attached EPC Objects
4. Execute Training – Dynamic Field Visibility
5. Execute Training – Streamlined Extension Request Handling
6. General UX & UI Enhancements

4.2.1. Performance Improvements

This release brings significant improvements to the performance and speed of **QMS** applications.

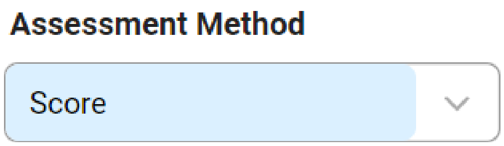
1. **Improved Form Loading Time**
    - Backend optimizations have resulted in faster form loading times.
    - Users can expect a more efficient and responsive experience.

2. **Mass User Training Assignment Time**
    - The time taken for mass user training assignments has been dramatically reduced, moving from several hours to just minutes.
    - Administrators can now efficiently manage and assign trainings for large groups of users.



4.2.2. Enhanced Implementation of Score Assessment Method

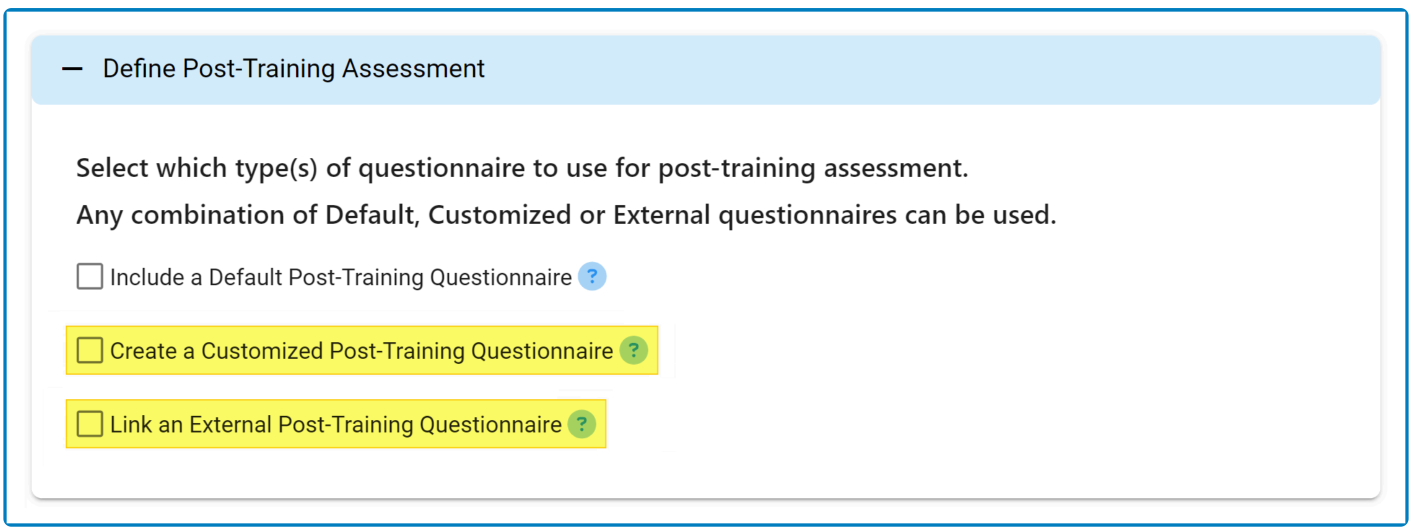
We have made improvements to the way the Score assessment method is implemented within the **Training** application. These changes were introduced to further ensure clarity while maintaining user-friendliness.



Key Changes:

1. **Post-Training Assessment Requirement**

When Score is selected as the assessment method, users are now required to set up **at least one** post-training assessment. This assessment must take the form of either a customized or external questionnaire.

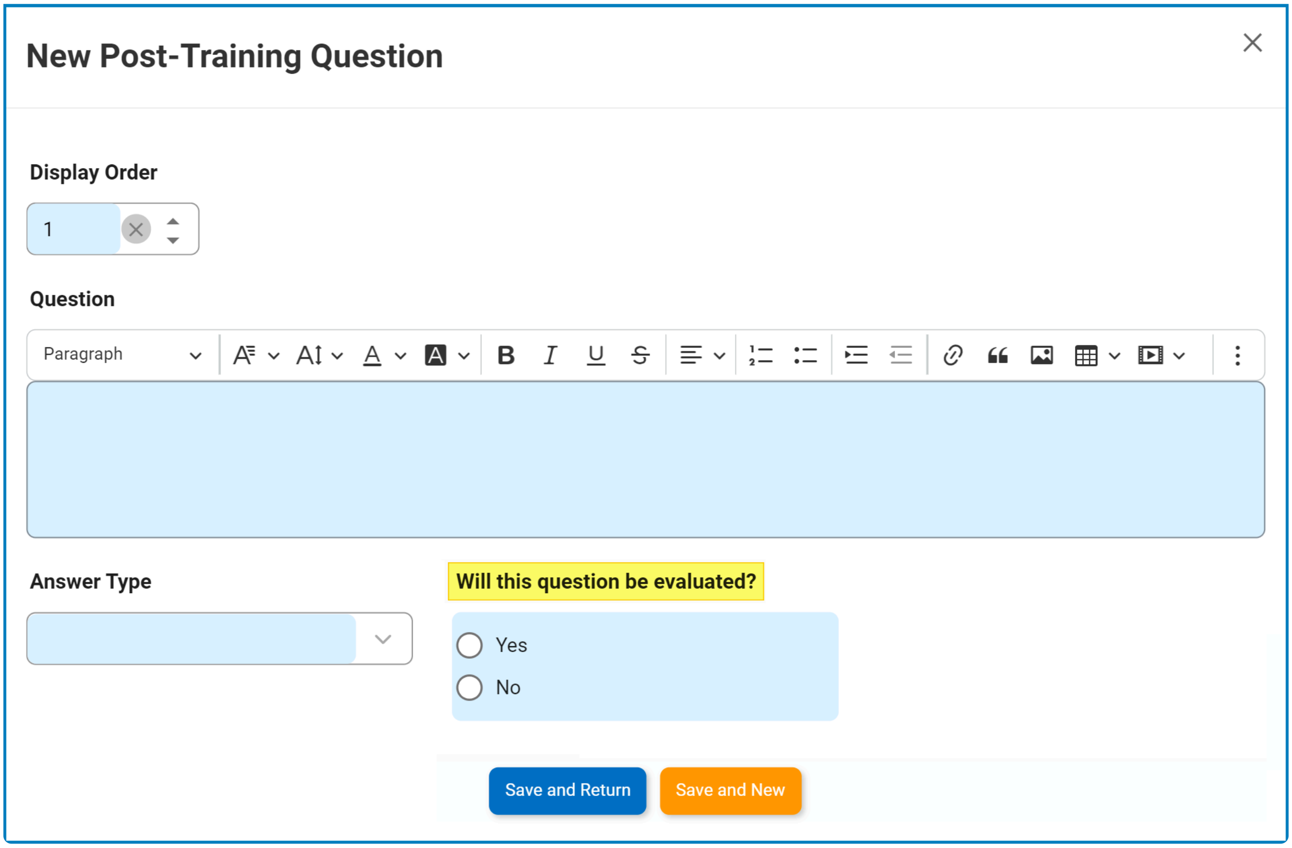


> The default questionnaire, which consists of a set of predetermined questions, does not contribute to the scoring process.

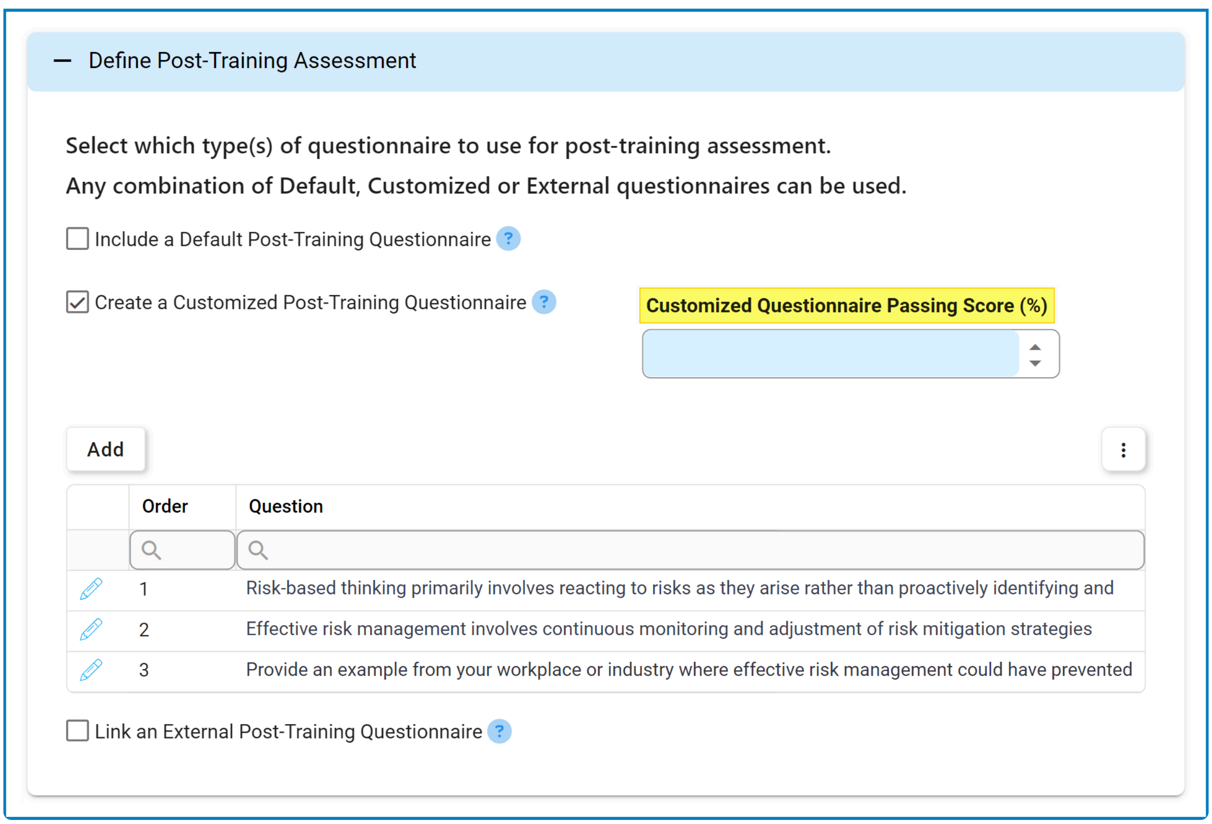
2. **Post-Training Assessment – Customized Questionnaire Evaluation**

For customized post-training assessments, each question can now be individually configured for evaluation.

- A new radio button has been added to the New Post-Training Question form, allowing users to specify whether the question will contribute to the assessment's overall score.



- If Yes is selected, the **Customized Questionnaire Passing Score (%)** field becomes visible and mandatory, requiring a range between 1 and 100.



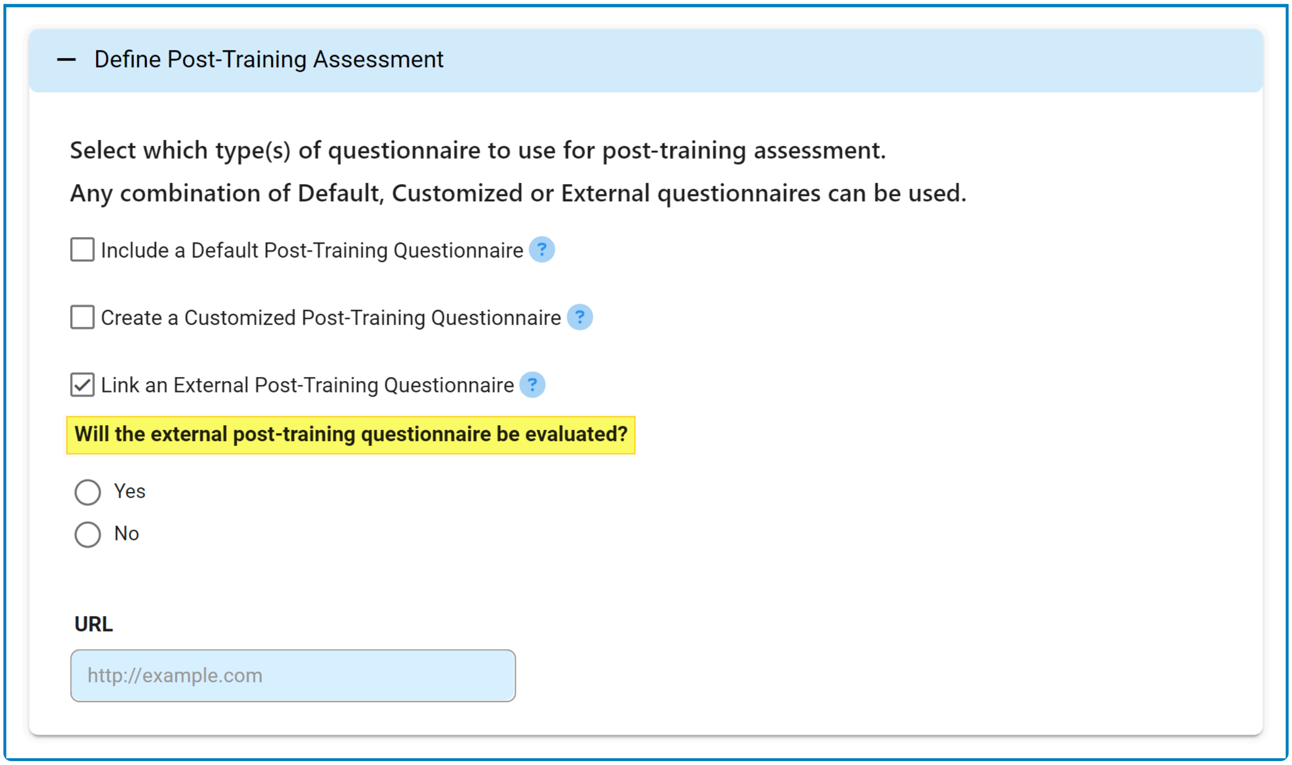
- If No is selected, the **Customized Questionnaire Passing Score (%)** field remains hidden.

> This feature grants users the flexibility to incorporate questions without impacting the overall score, giving them greater control over their assessment criteria.

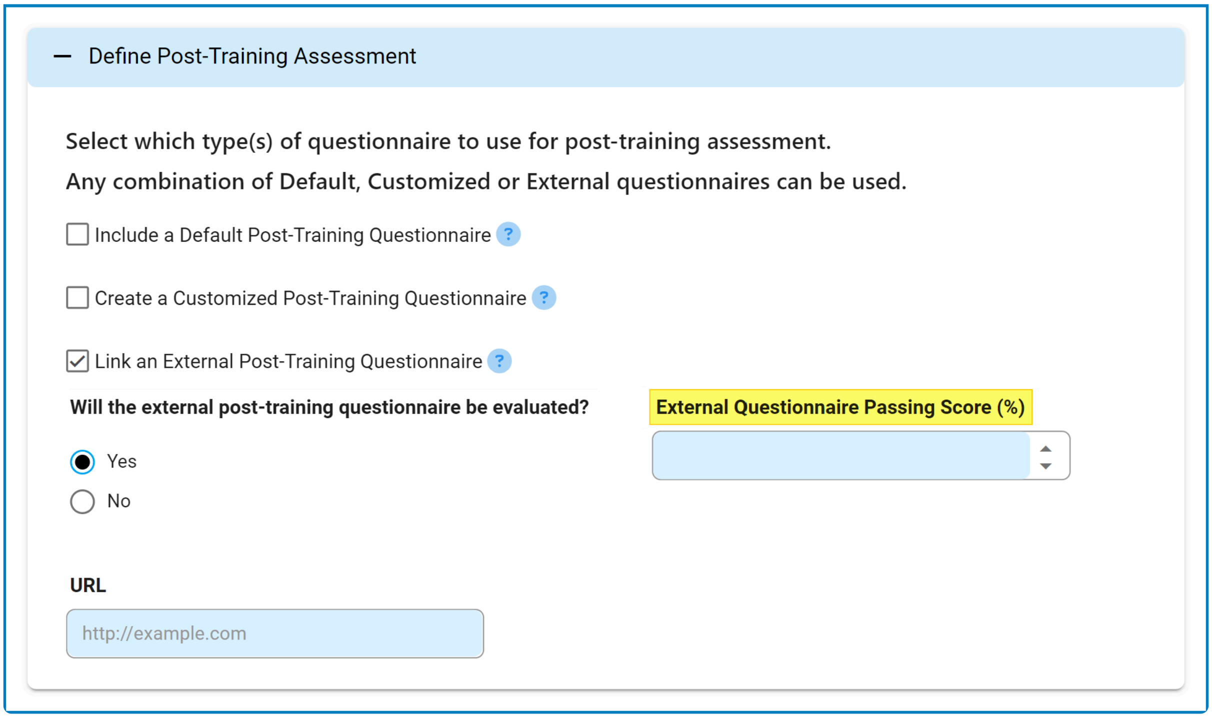
3. **Post-Training Assessment – External Questionnaire Evaluation**

Similarly, external post-training assessments can now also be configured for evaluation.

- When an external post-training assessment is selected, a new radio button now appears, allowing users to specify whether the questionnaire will contribute to the assessment's overall score.



  - If Yes is selected, the **External Questionnaire Passing Score (%)** field becomes visible and mandatory, requiring a range between 1 and 100.



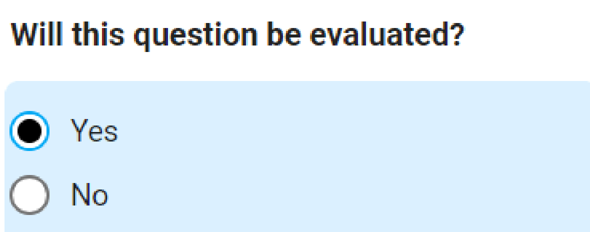
- If No is selected, the **External Questionnaire Passing Score (%)** field remains hidden.

> This feature grants users the flexibility to opt out of scoring an external questionnaire when they deem it unnecessary.

4. **Mandatory Evaluation Requirement**

Crucially, when selecting Score as the assessment method, users must ensure that **at least one** post-training assessment item undergoes evaluation.

- To meet this requirement, users must select Yes when prompted by the respective radio button query, whether for an individual question in the customized questionnaire or for the entire external questionnaire.

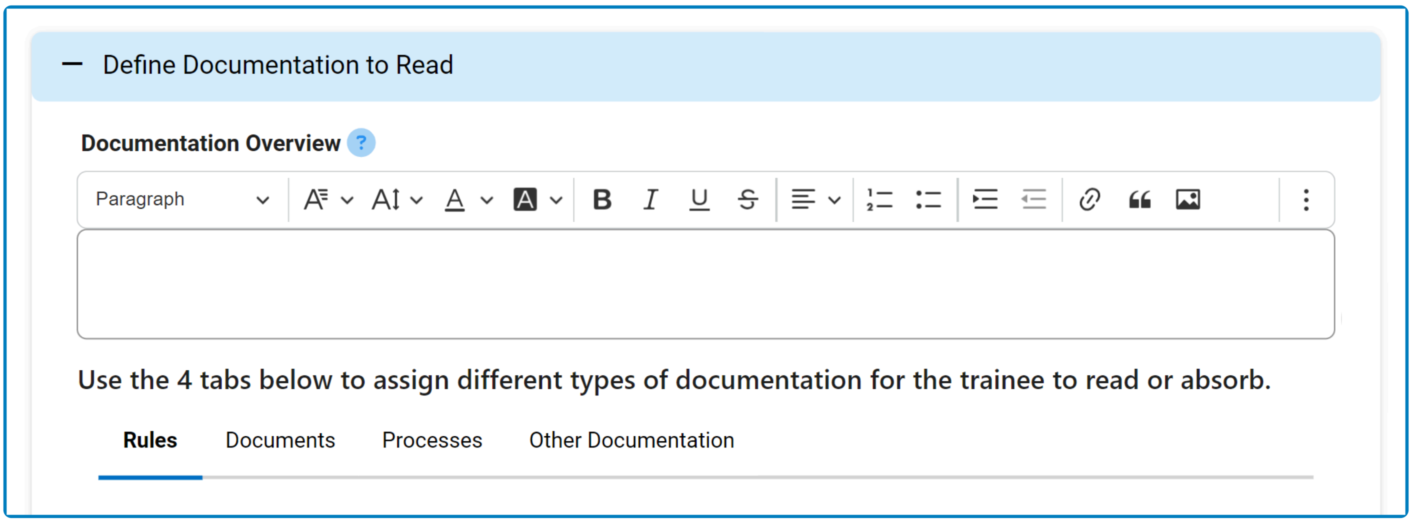


4.2.3. New Training – Enhanced Training Content Management

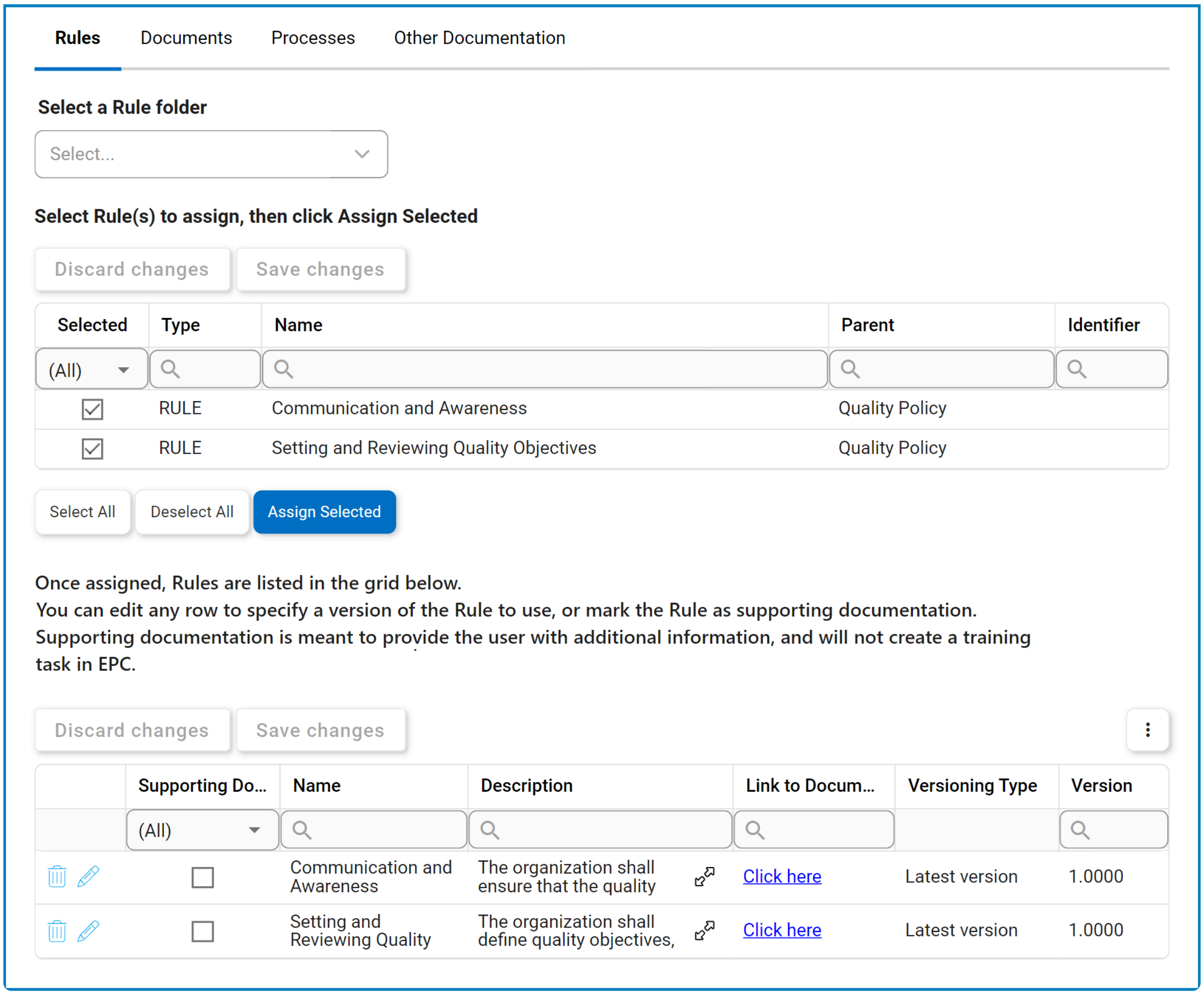
We have streamlined the management of training content and materials in the New Training module, adopting a more flexible and user-friendly approach. The previous **Training Content** section has been replaced with two separate accordions:

1. **Define Documentation to Read**

In this section, users can define the documentation to be assigned as reading material for trainees. Users can provide an overview of the documentation, including any necessary instructions or access credentials. They can also categorize the documentation as either primary or supporting.

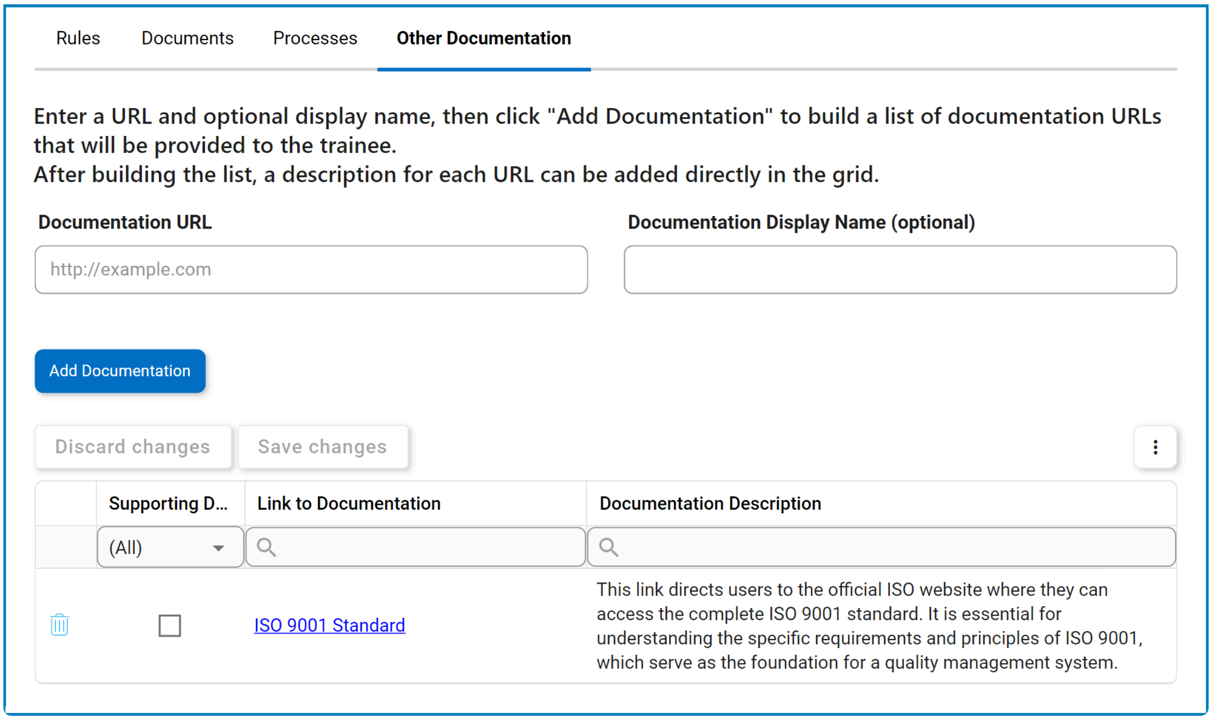


- **Types of Documentation:**
    - **EPC Objects:** Users retain the ability to assign EPC objects (rules, documents, or processes) as reading material. For each EPC object, users can specify the version to be assigned.



> Please note that when an EPC object is marked as supporting documentation, it will not generate a training task in EPC; its purpose is to supplement the primary content.

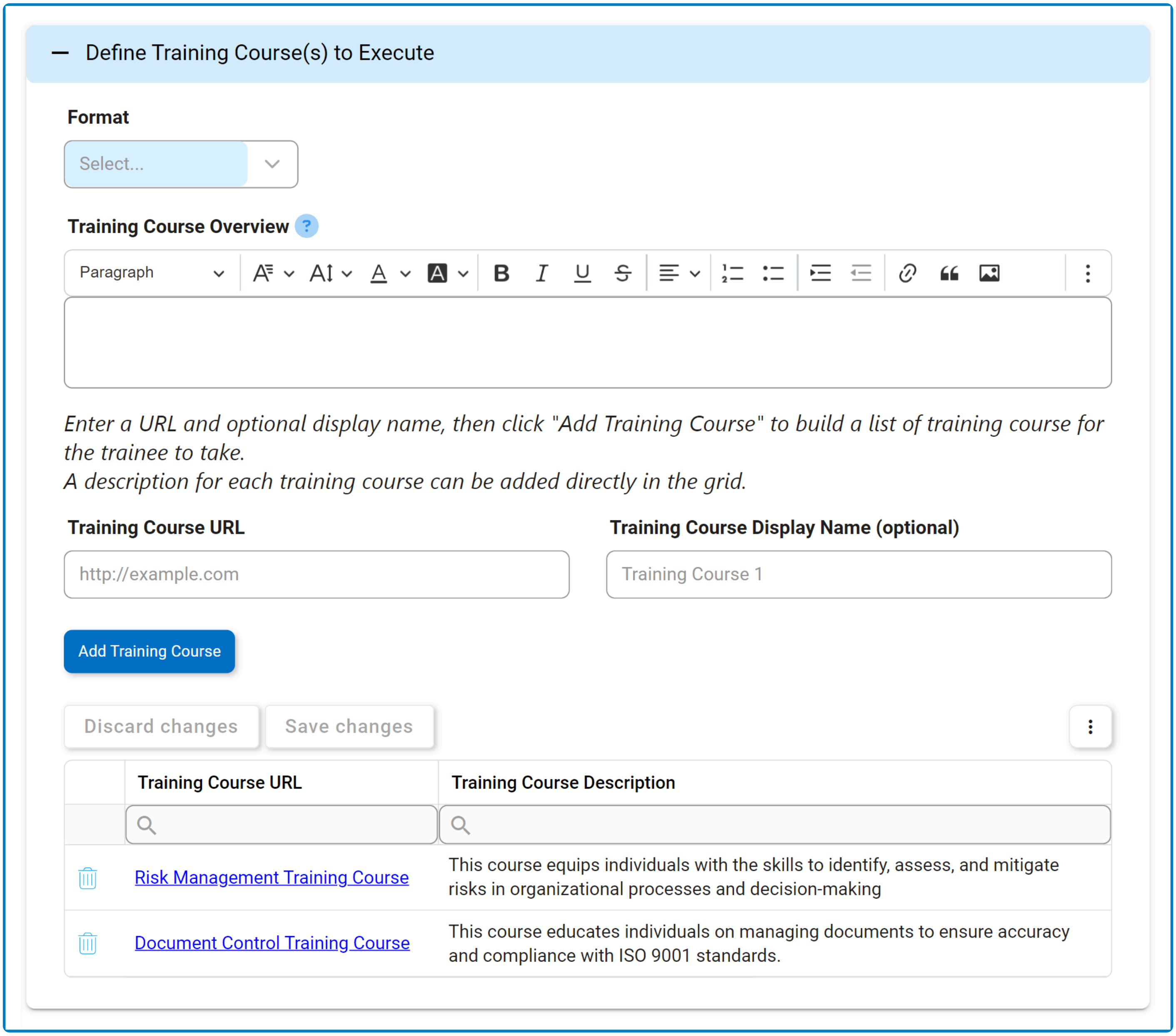
- **Other Documentation:** Users can now also include links to external documentation—an improvement from the previous version, where only a description of the external content source was possible.



For each external link, users can assign a custom display name. These links, once added, are listed in a separate grid, where users can provide corresponding descriptions or remove links as needed. If no display name is provided, the URL will be listed as is.

2. **Define Training Course(s) to Execute**

In this section, users can define courses for the training. No longer limited to offering a single training course, users can now curate a list of courses for trainees to complete. Users can provide links to these courses, similar to how they would for external documentation, and have the option to include a course overview, along with any necessary instructions and access credentials.



To complete this section, users must choose the format for the training course or course series.

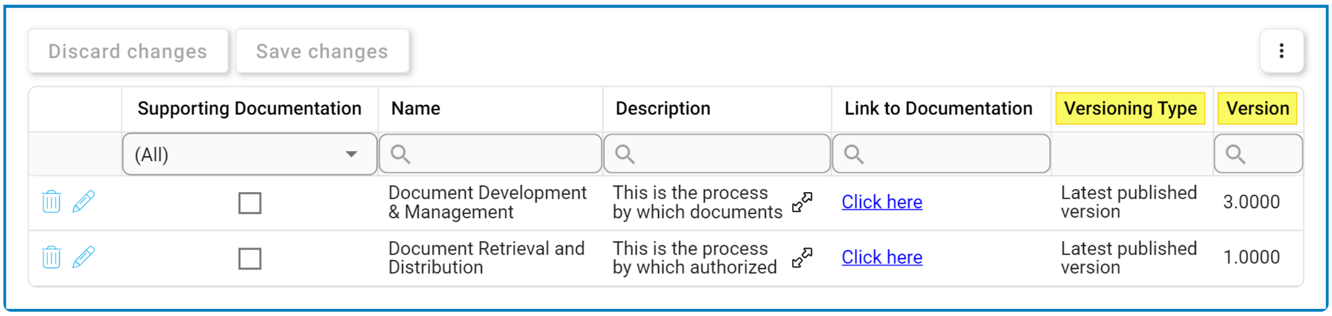
Please note that both of these accordions are initially hidden in the form and can be revealed by selecting the corresponding checkboxes: **Include Documentation to Read** or **Include Training Course(s) to Execute**.

4.2.4. New Training – Automatic Version Display for Attached EPC Objects

When an EPC object is attached to a training, its version is now automatically displayed in the Attached [Object] grid.

How It Works:

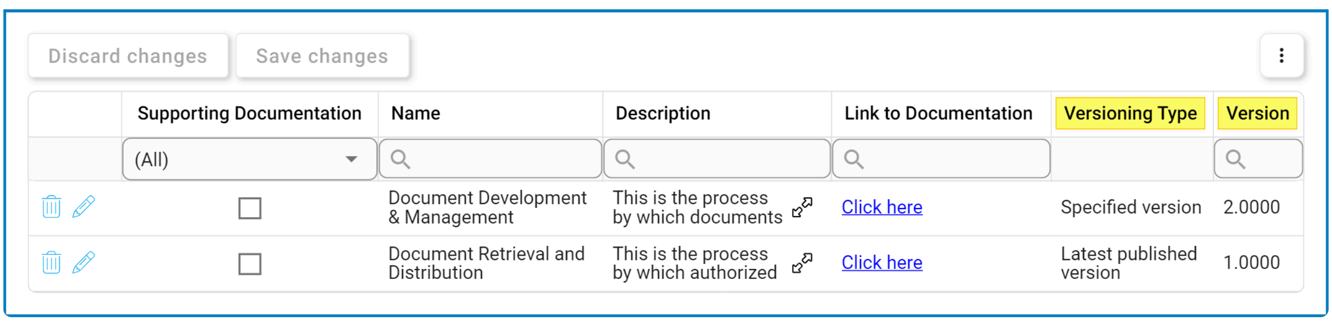
- By default, the versioning type is set to Latest Published Version. Consequently, the latest published version of the attached EPC object is automatically displayed in the grid when it is attached to the training.



Discard changes Save changes

	Supporting Documentation	Name	Description	Link to Documentation	Versioning Type	Version
	(All)					
	☐	Document Development & Management	This is the process by which documents	Click here	Latest published version	3.0000
	☐	Document Retrieval and Distribution	This is the process by which authorized	Click here	Latest published version	1.0000

- If a user chooses to change the versioning type for the attached object, the displayed version will update accordingly to reflect the user's preference.



Discard changes Save changes

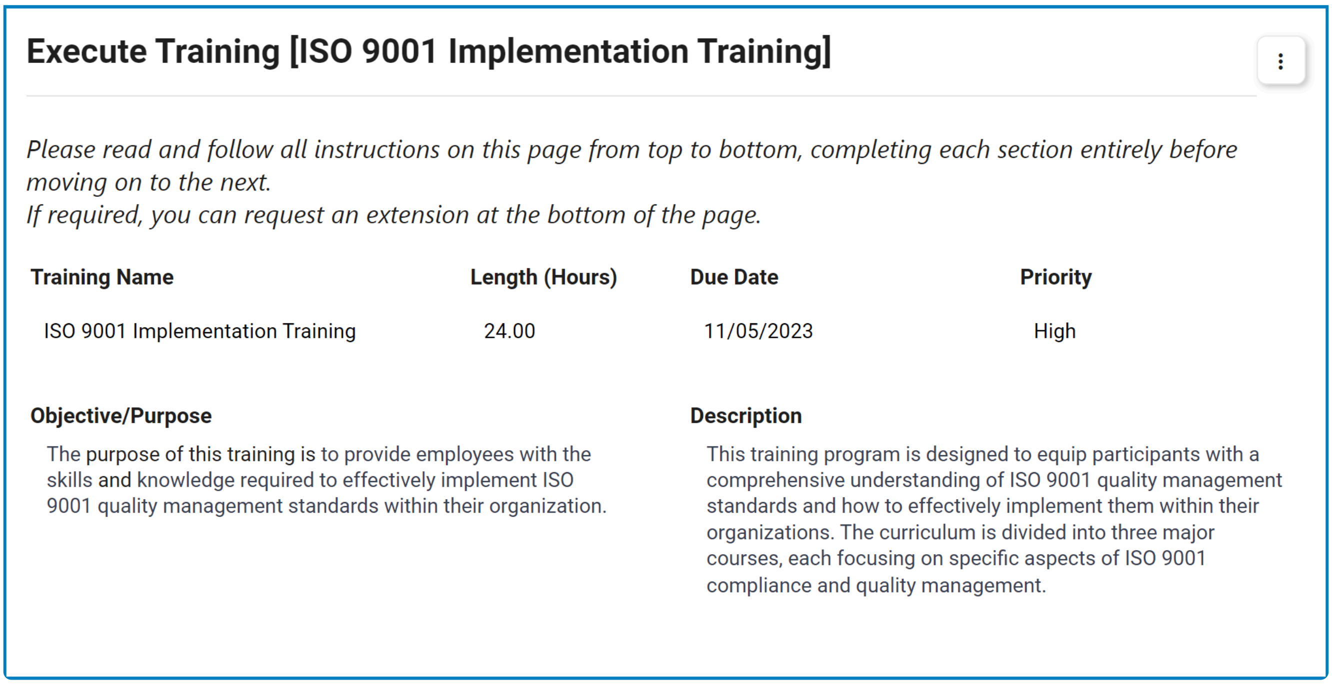
	Supporting Documentation	Name	Description	Link to Documentation	Versioning Type	Version
	(All)					
	☐	Document Development & Management	This is the process by which documents	Click here	Specified version	2.0000
	☐	Document Retrieval and Distribution	This is the process by which authorized	Click here	Latest published version	1.0000

4.2.5. Execute Training – Dynamic Field Visibility

In the Execute Training form, fields are now dynamically shown or hidden depending on their applicability and relevance.

How It Works:

- If information is provided for specific fields in the New Training form, these fields will remain visible during the training execution.



Execute Training [ISO 9001 Implementation Training]

Please read and follow all instructions on this page from top to bottom, completing each section entirely before moving on to the next.
If required, you can request an extension at the bottom of the page.

Training Name	Length (Hours)	Due Date	Priority
ISO 9001 Implementation Training	24.00	11/05/2023	High

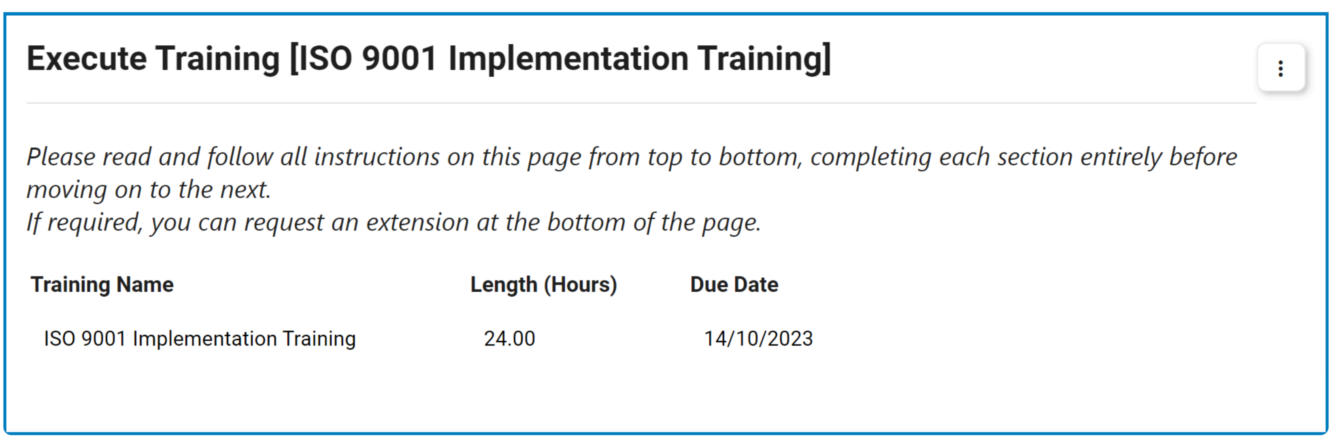
Objective/Purpose

The purpose of this training is to provide employees with the skills and knowledge required to effectively implement ISO 9001 quality management standards within their organization.

Description

This training program is designed to equip participants with a comprehensive understanding of ISO 9001 quality management standards and how to effectively implement them within their organizations. The curriculum is divided into three major courses, each focusing on specific aspects of ISO 9001 compliance and quality management.

- If information is not provided for specific fields in the New Training form, these fields will automatically be hidden during the training execution.



Execute Training [ISO 9001 Implementation Training]

Please read and follow all instructions on this page from top to bottom, completing each section entirely before moving on to the next.
If required, you can request an extension at the bottom of the page.

Training Name	Length (Hours)	Due Date
ISO 9001 Implementation Training	24.00	14/10/2023

Fields with Dynamic Visibility

The following fields in the Execute Training form exhibit dynamic visibility, meaning they adapt based on the information provided in the corresponding fields of the New Training form.

- Objective/Purpose
- Description
- Priority
- Applicability
- Source
- Documentation Overview
- Training Course Overview
- Instructor
- Location

> This improvement ensures that trainees are presented only with the relevant information, reducing visual clutter and creating a cleaner interface.

4.2.6. Execute Training – Streamlined Extension Request Handling

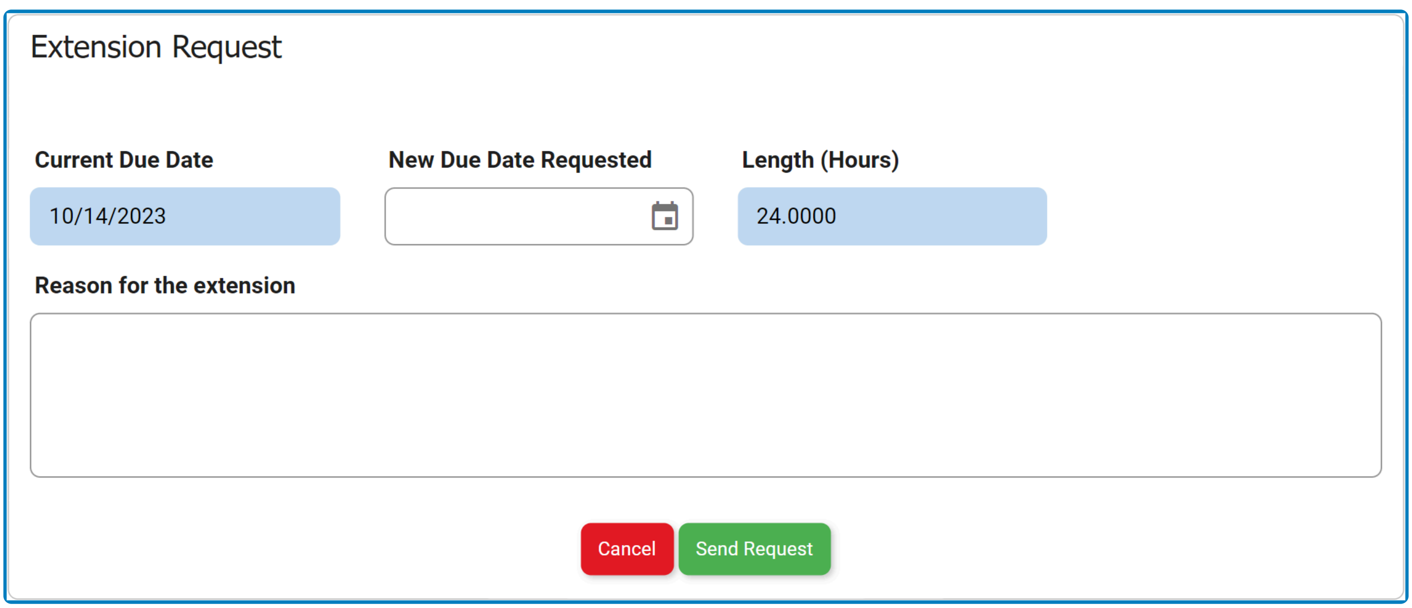
We have made enhancements to the process by which extension requests are handled within the **Training** application. These improvements streamline the user experience and offer a more intuitive way for trainees to request and track extensions.

Key Changes:

1. **Request an Extension Button**

Previously, to request an extension, trainees were required to check a box and navigate through a nested form, a process which proved cumbersome and confusing. Now, trainees can simply click the **Request an Extension** button.

This action reveals the extension request section, where users can input their requested new due date and provide a reason for the extension.



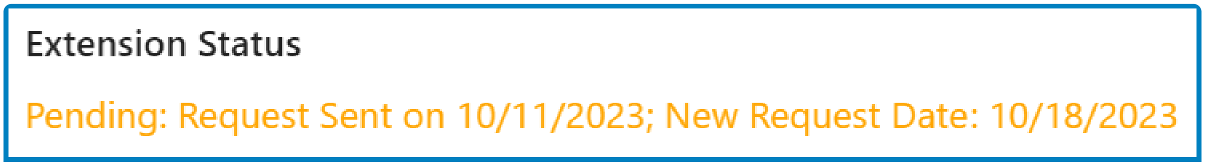
- ***Send Request:*** This button allows users to send the extension request to the assigned manager(s) of the training, as determined by the **Training Execution Sign-Off** dropdown in the New Training form.
- ***Cancel:*** This button allows users to cancel the extension request and hide the section.

2. **Extension Request Status**

Trainees now have improved visibility into the status of their extension requests, enabling them to track their progress. There are three possible states:

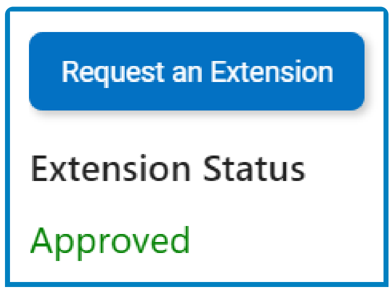
- **Extension Status: Pending**

This status indicates that the extension request is awaiting approval. It displays both the date on which the request was sent and the newly requested due date. At this stage, the **Request an Extension** button is hidden until a decision is made.



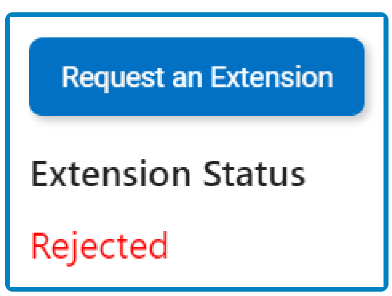
- **Extension Status: Approved**

This status indicates that the extension request has been approved. At this stage, the **Request an Extension** button reappears, allowing users to send additional extension requests if needed.



- **Extension Status: Rejected**

This status indicates that the extension request has been rejected. Similar to the previous status, at this stage, the **Request an Extension** button reappears, allowing users to send additional extension requests if needed.



! Trainees can send multiple extension requests, with the status updating according to the latest request.

4.2.7. General UX & UI Enhancements

In our ongoing commitment to optimizing the user experience with the **Training** application, we have implemented a series of enhancements aimed at elevating its interface.

Changes in this latest release include:

1. **Streamlined Navigation & Structure**

To enhance user experience, we have streamlined navigation to and within the **Training** application, simplifying the overall platform structure. This effort involved removing redundant categories, resulting in fewer steps needed to access the application and its modules.

- For example, although the **Training** application remains a part of the **QMS** application suite, it is no longer nested under the **QMS** category.

  Previous Navigation Path

  Home Page / Quality Management System / Training

- Similarly, a range of modules within the **Training** application, such as New Training and Training List, are now readily available on the first-level category under **Training**.

  Previous Navigation Path

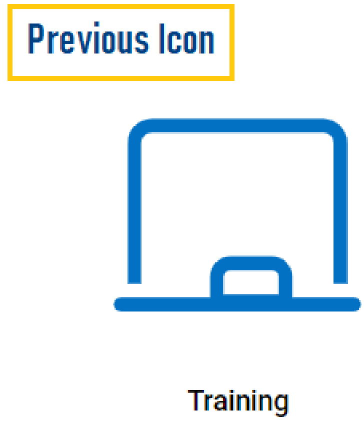
  Home Page / Training / Manage Trainings / New Training

> Please note that, where categories enhance clarity and usability, such as **Trigger Training Instance**, we've retained them for an improved organizational structure.

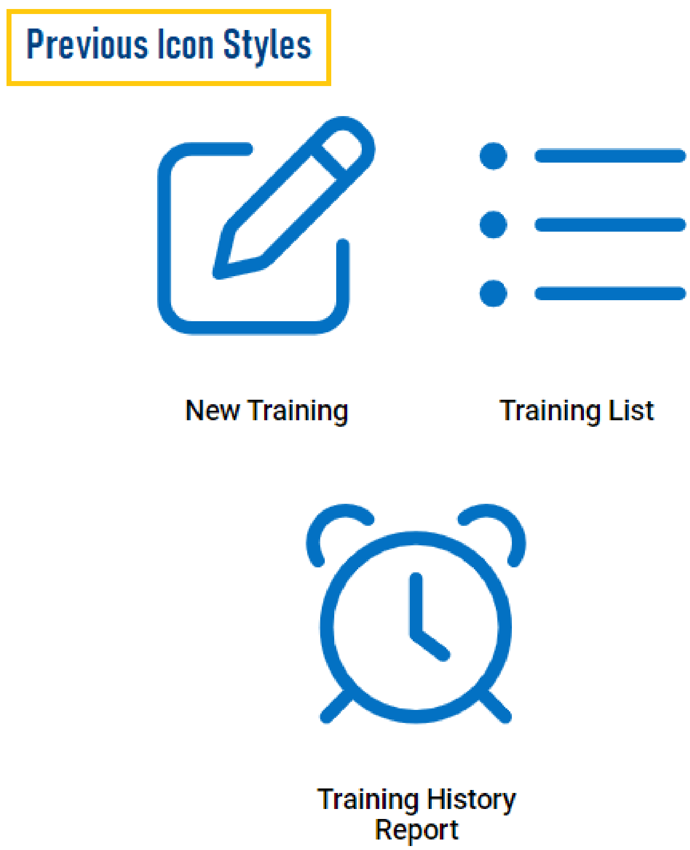
2. **Enhanced Iconography**

We have also updated the icons used to represent the **Training** application and its modules, achieving three key objectives:

- **Distinct Application Identity:** We have changed the **Training** application's icon to make it more distinguishable and align it better with its intended purpose.



- **Consistent Icon Styles:** To create a more cohesive visual experience both within the application and across the **QMS** suite, we have standardized icon styles for modules with similar functions.
    - For example, modules presenting lists, such as Training List, now share the same **List** icon. Modules for creating new items, such as New Training, use the same **Add** icon.



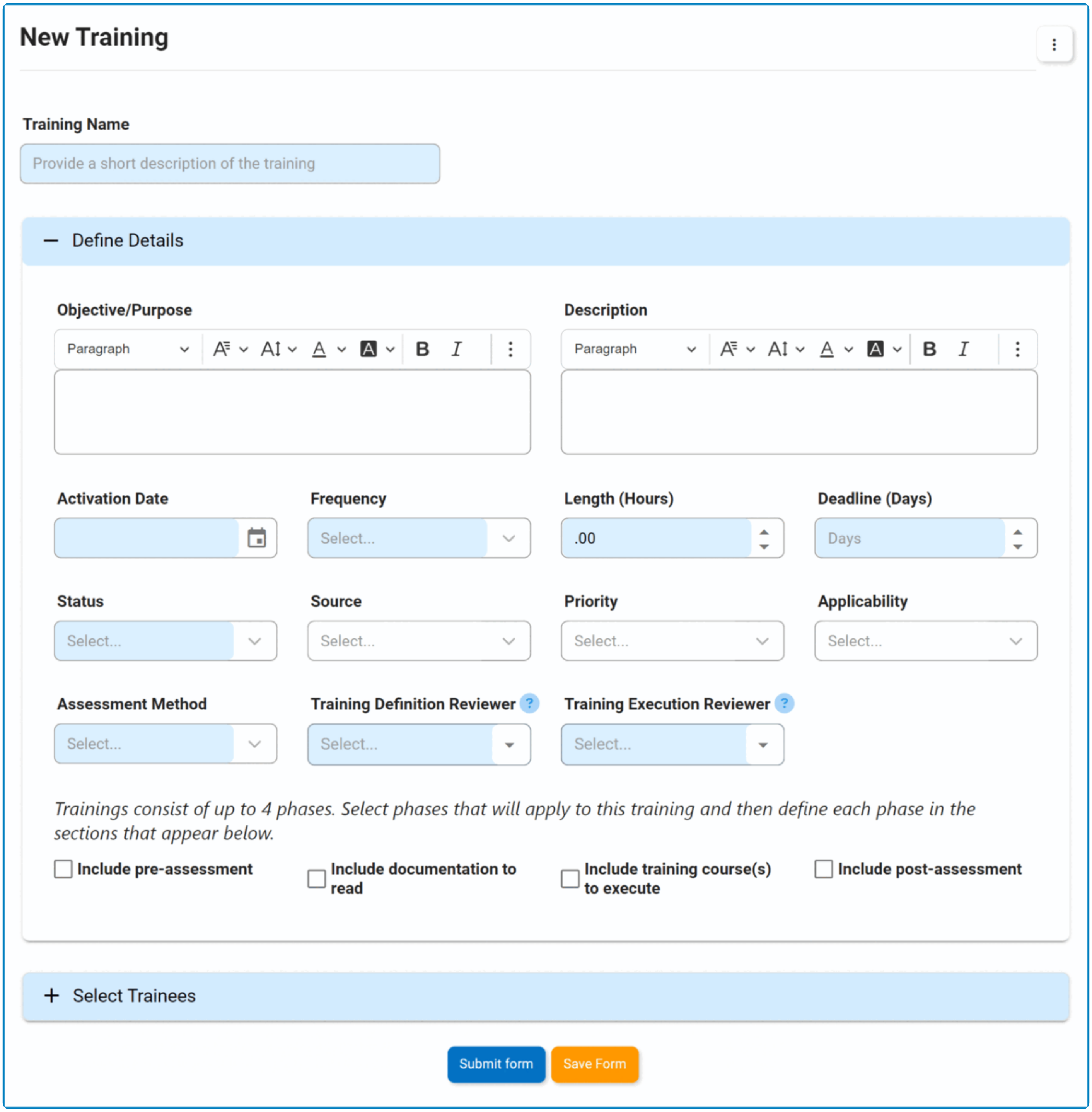
- **Modern Design:** As part of our design evolution, demonstrated in the above graphics, we have adopted a thinner icon style, embracing a sleeker and more modern aesthetic.

3. **Improved Form Design & Layout**

We have redesigned our forms to make them more intuitive and space-efficient. This includes reordering fields to ensure a logical flow, improving field labels for clarity and comprehension, and removing unnecessary elements to simplify and declutter the interface.

We have also transitioned from tabs to accordions, a change which not only enhances aesthetics and readability but also enables a more focused interaction with content. Users can now smoothly navigate through forms, progressively revealing information as needed.

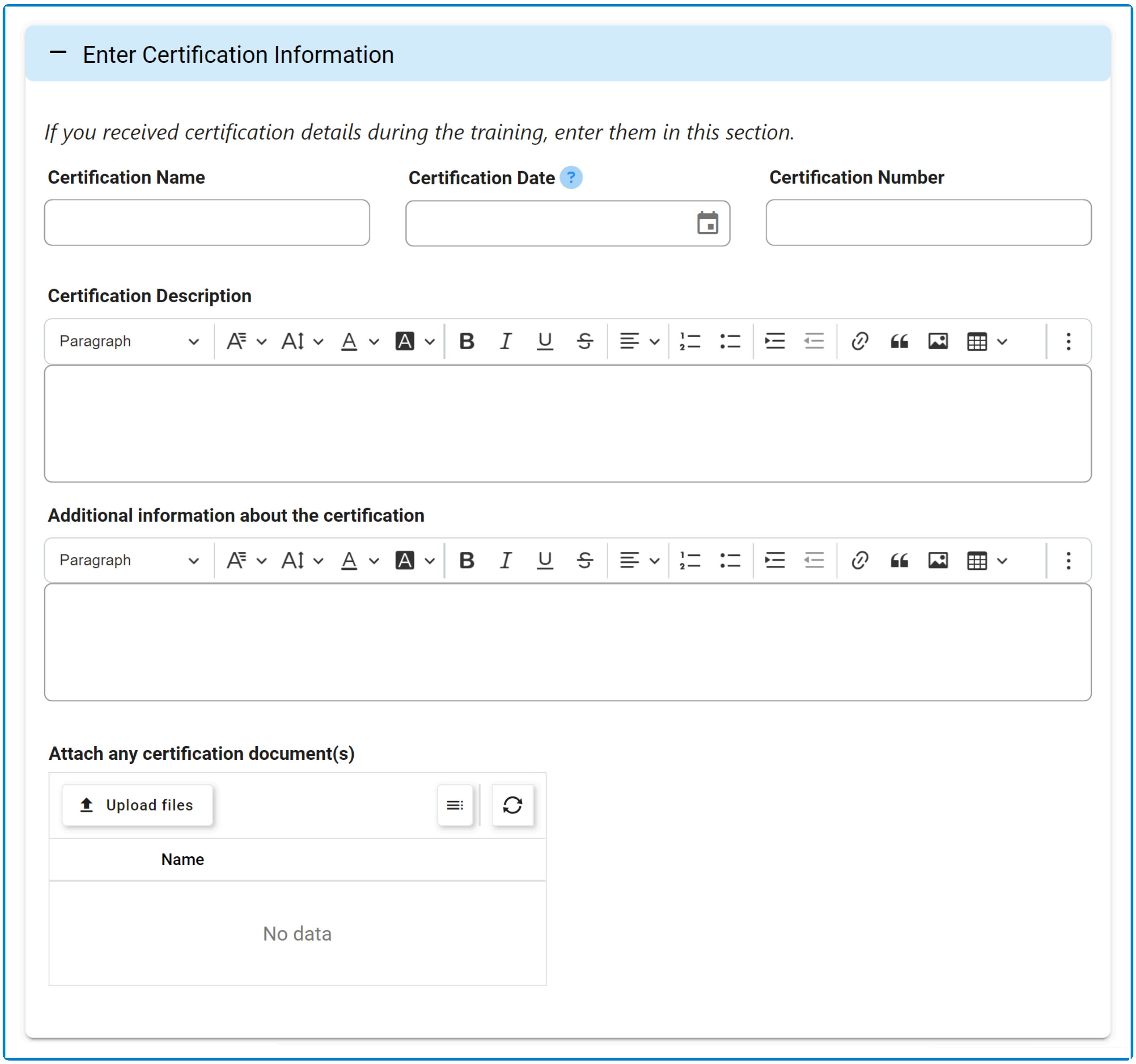
> Please note that in the case of the New Training form, certain accordions are initially hidden and can be revealed dynamically through checkbox selection. This dynamic feature caters to the diverse needs of our users, ensuring that only relevant sections are displayed.



In the Review Training Definition, Execute Training, and Sign-Off Training Completion forms, accordions, much like the tabs before them, are dynamically shown or hidden based on their relevance to the training. This approach ensures that the interface remains clean and user-centric throughout all application workflows.

4. **Certification Information**

We have relocated the section for entering certification information from the New Training form to the Execute Training form. This change was made to better align with its relevance and appropriateness within the training workflow.



Please note that these UI enhancements are specific to the **Training** application. For a broader understanding of UI enhancements across the entire **DBP** web application, we recommend referring to the 14.1 release notes for the Designer program.

5. General Application Functionalities

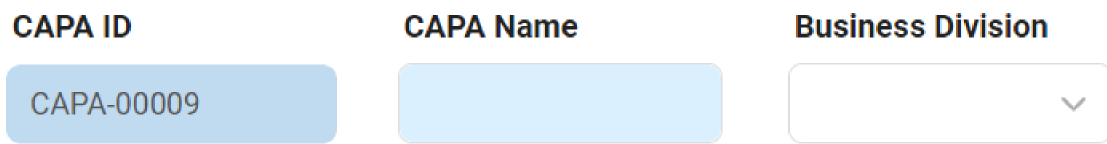
To enhance understanding and utilization of the application, users are encouraged to familiarize themselves with the following key features and options:

- **Field Behavior**: Learn how disabled, enabled, and mandatory fields appear and behave in the application.
- **Dropdown Controls**: Learn how to effectively use single-select and multi-select dropdown fields for efficient and accurate data selection.
- **Rich Textbox Controls**: Learn how to utilize rich textbox controls to add formatting, images, links, and more to your content.
- **Comment Controls**: Learn how to add, edit, reply to, or delete comments.
- **Templates**: Learn how to access and utilize pre-designed document templates.
- **Interactive Chart Controls**: Learn how to utilize the interactive chart control for data visualization, interpretation, and analysis.

! By default, in the **DBP** web application, sessions time out after 20 minutes of inactivity. To access the latest version of content, users will need to refresh the page.

5.1. Field Behavior

To distinguish between different fields in the interface, specific visual cues are employed. By default, disabled fields, which cannot be modified, are presented with a dark background color.* Mandatory fields, on the other hand, which must be filled out, are highlighted with a light-blue background color.** Enabled fields, in contrast, do not have any background color, appearing transparent.



* In the settings of either the Designer program or the **DBP** web application, users can set the background of disabled fields as transparent. In this mode, disabled fields nonetheless remain distinguishable from enabled fields in that they cannot be manipulated by the user in any way.

** In the **DBP** web application, users have the ability to customize the color of mandatory fields according to their preference.

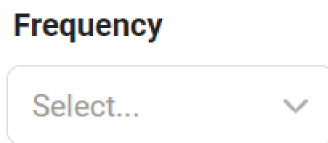
5.2. Dropdown Controls

There are two types of dropdown fields that are commonly used in forms:

1. Single-Select Dropdown Fields
2. Multi-Select Dropdown Fields

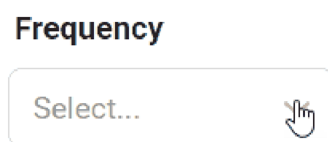
5.2.1. Single-Select Dropdown Fields

A single-select dropdown field allows users to select only one value at a time from a predetermined list of options.

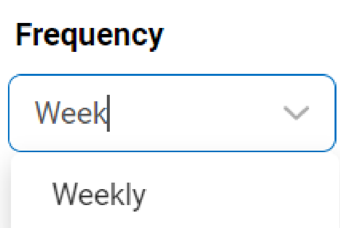


There are two ways to select an item from the dropdown:

1. Click on the icon. It will release the list of values. Users can then scroll through the options and make their selection.



2. Search for the value in the dropdown by inputting its name or keywords relating to it. Any items that match the search will be retrieved. Users can then click on the desired value to finalize their selection.



5.2.1.1. Single-Select Dropdown Field with Modal Window

Although most single-select fields release a dropdown menu, there are some that instead open a modal window.

> A modal window is a pop-up window that disables the main form, requiring users to interact with it before they can regain access. Users can interact with a modal typically by either completing the set task or exiting the window.

To use a single-select dropdown field linked to a modal window, follow these steps:

1. Click on the icon. It will open a modal window containing the options available to choose from.
2. Navigate through the options and select the desired one by double-clicking on it.
    - Users will then be returned to the main form where they will find the field now populated with their selection.
3. Otherwise, to return to the main form without making a selection, click on the **Exit** (**X**) button.

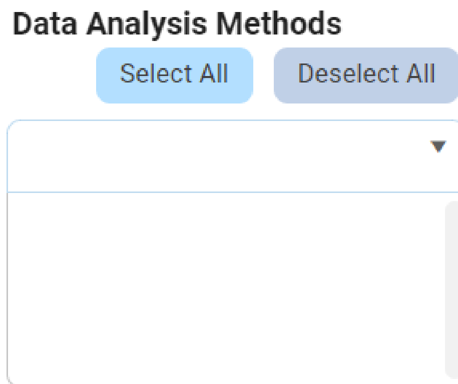
In the example below, the modal window contains a tree view control to help users navigate through a hierarchical structure of options.

> Users can determine the contents of the modal window by creating the form and linking the corresponding form behavior to the control.


Folder
Select...

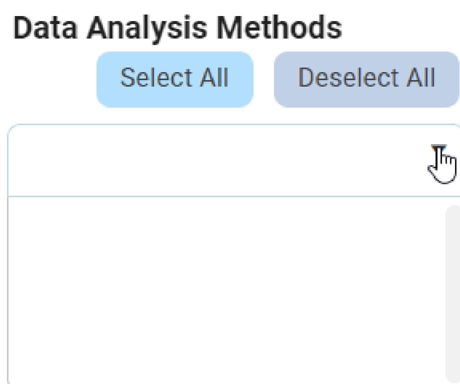
5.2.2. Multi-Select Dropdown Fields

A multi-select dropdown field allows users to select multiple values at a time from a predetermined list of options.

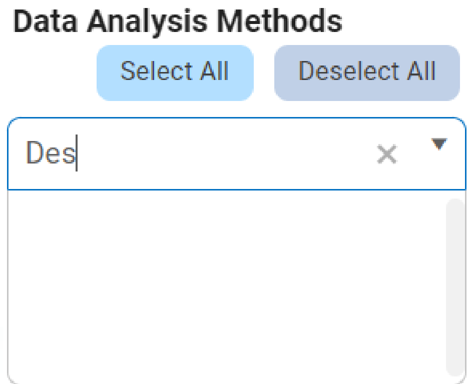


There are two ways to select items from the dropdown:

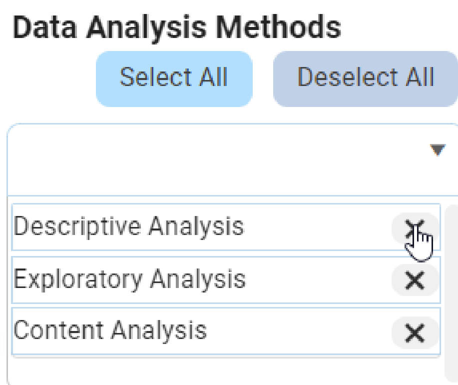
1. Click on the ▼ icon. It will release the list of values. Users can then scroll through the options and make their selection.



2. Search for the value in the dropdown by inputting its name or keywords relating to it. Any values that match the search will be retrieved. Users can then click on the desired value to finalize their selection.



After selecting items, users can remove them from the dropdown by clicking on the **X** button.



> ✻ To automatically select all items in the list, click on the **Select All** button. To automatically deselect all items in the list, click on the **Deselect All** button.

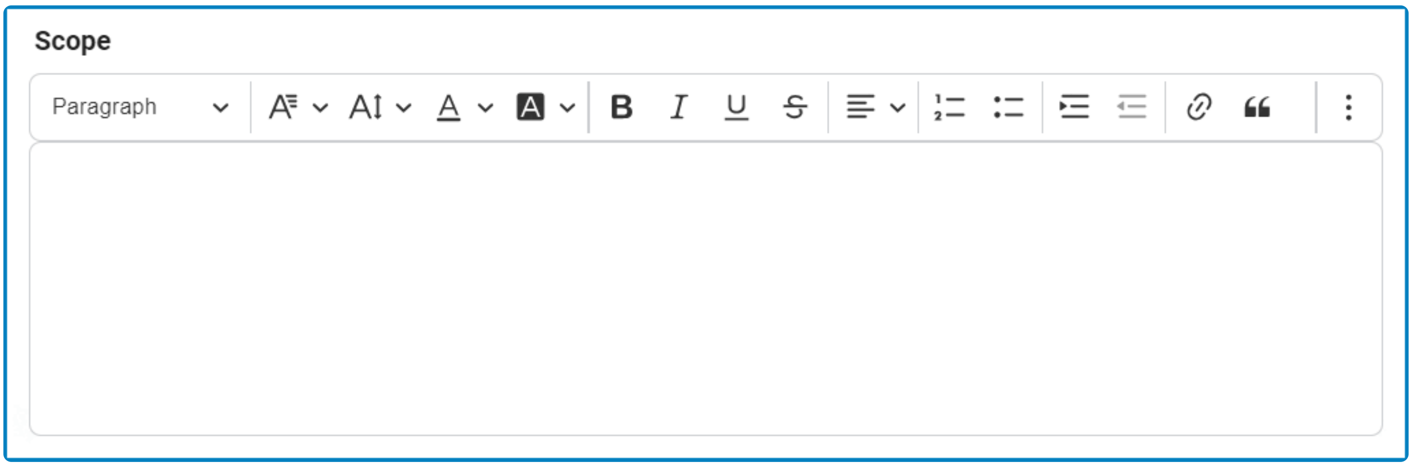
5.3. Rich Textbox Controls

In certain forms, users are provided access to rich text fields, also known as rich textbox controls.

For those unfamiliar with using these fields, here are some key features to consider:

1. **Text Formatting**

Users have access to various formatting options in the rich textbox control, including:

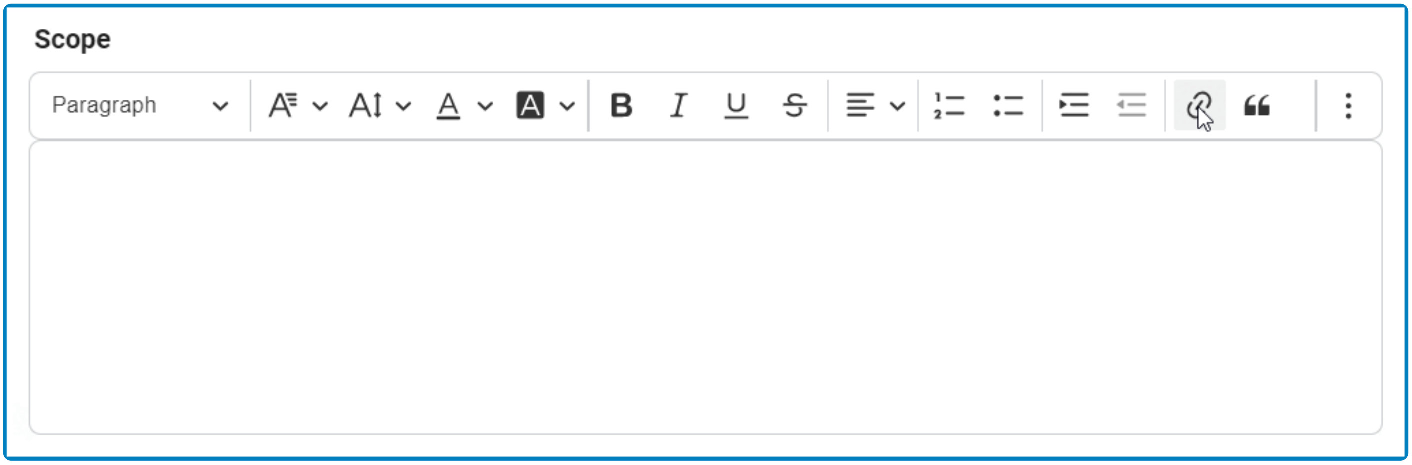


- ***Heading Style:*** This field allows users to choose a heading style from a dropdown menu.
- ***Font Family:*** This field allows users to choose the font family from a dropdown menu.
- ***Font Size:*** This field allows users to choose the font size from a dropdown menu.
- ***Font Color:*** This field allows users to choose the font color from a dropdown menu.
- ***Font Background Color:*** This field allows users to choose the font background color from a dropdown menu.
- ***Bold:*** This button allows users to apply a bold effect to the selected text.
- ***Italic:*** This button allows users to apply an italic or slanted effect to the selected text.
- ***Underline:*** This button allows users to apply an underline effect to the selected text.
- ***Strikethrough:*** This button allows users to apply a strikeout effect to the selected text.
- ***Text Alignment:*** This field allows users to choose the alignment of the text from a dropdown menu.
- ***Numbered List:*** This button allows users to apply a numbered list format to selected text.
  - Users can create nested lists by using the **Indent** button, either in the rich text editor or on their keyboard.
- ***Bulleted List:*** This button allows users to apply a bulleted list format to selected text.
  - Users can create nested lists by using the **Indent** button, either in the rich text editor or on their keyboard.
- ***Increase / Decrease Indent:*** These buttons allow users to adjust the indentation level of the selected text.
- ***Block Quote:*** This button allows users to apply a block quote format to the selected text.

To undo any text formatting, users can either click on the **Undo** button or unselect the formatting option.

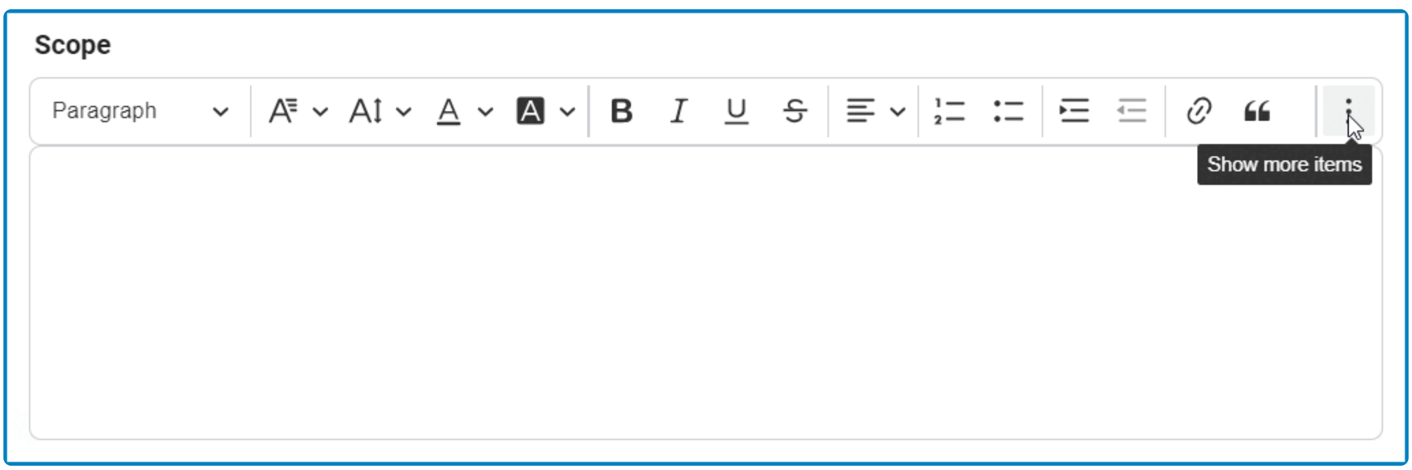
2. **Hyperlinks**

Users can insert hyperlinks to external web pages within the rich textbox control.



3. **Media Support**

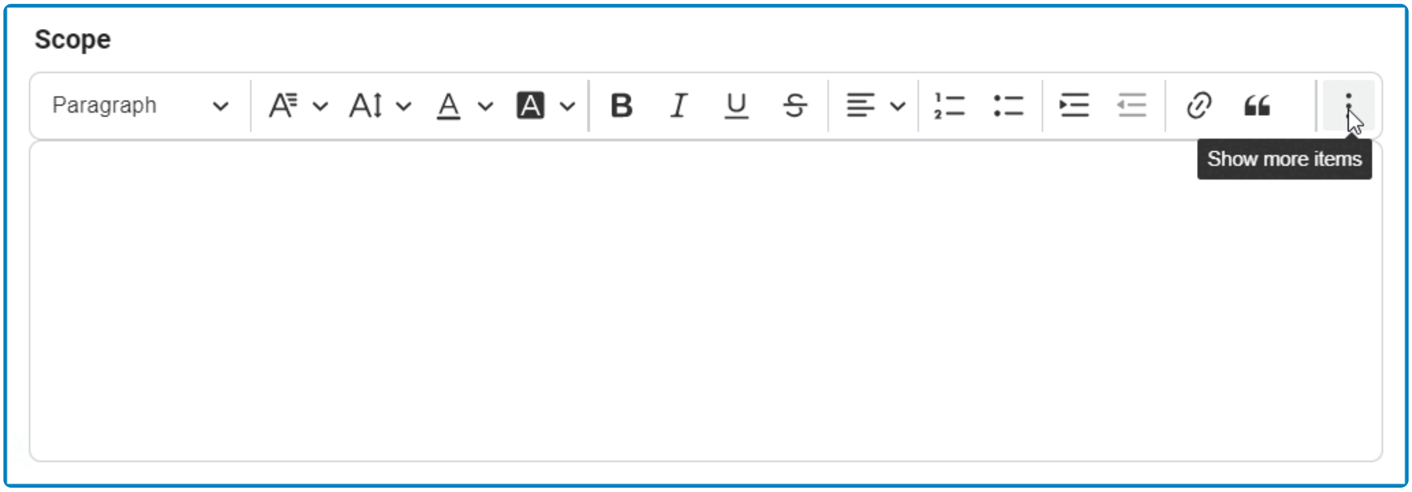
Users can embed various types of media into the rich textbox control, either by uploading them from their computer or by providing a URL to online media content.



Once an image has been inserted into the control, users can adjust its alignment, resize it, and add alternative text if needed.

4. **Table Support**

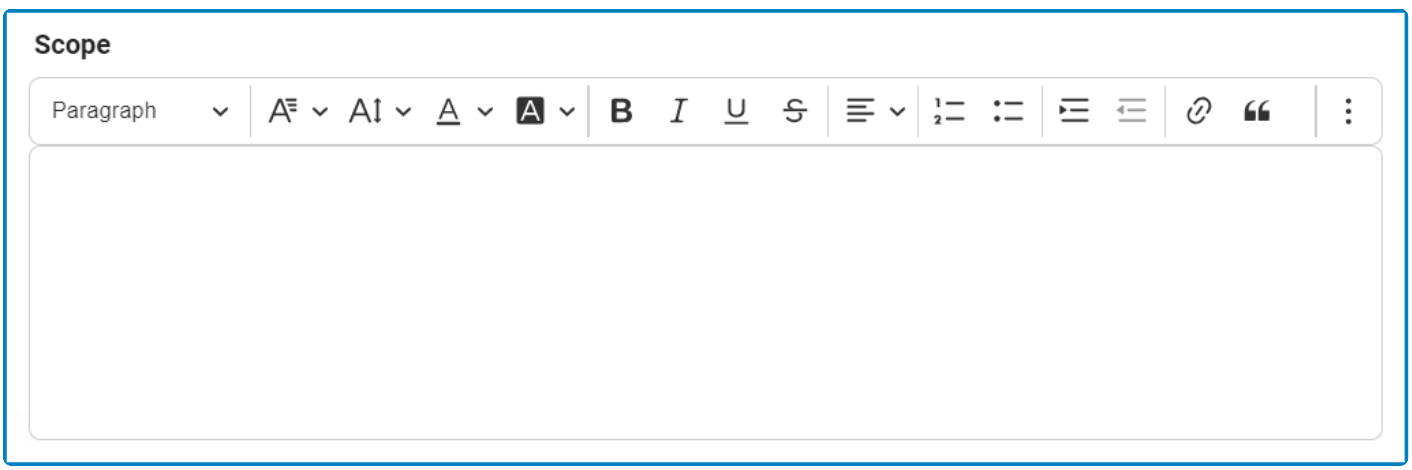
Users can add, edit, and format tables in the rich textbox control.



> Once a table has been inserted into the control, users can modify the column and row properties, merge or split cells, and adjust various table properties like border, background color, dimensions, and alignment. The control also enables users to modify individual cell properties for complete control over their table design.

5. **Undo / Redo**

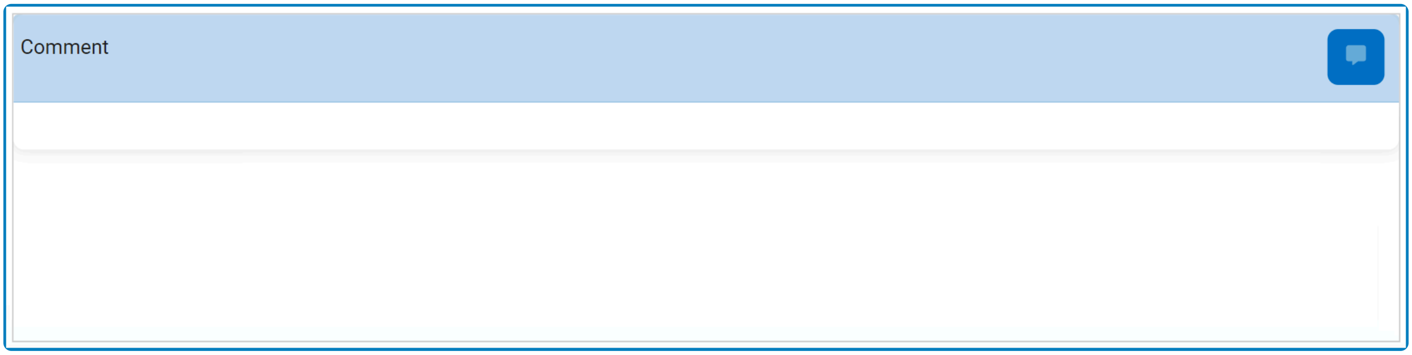
Users can undo or redo a previous action in the rich textbox control.



> Depending on the amount of text entered, a vertical scrollbar may appear on the side of the rich textbox to allow users to scroll through the contents. Additionally, users can resize this textbox by dragging at its bottom right corner.

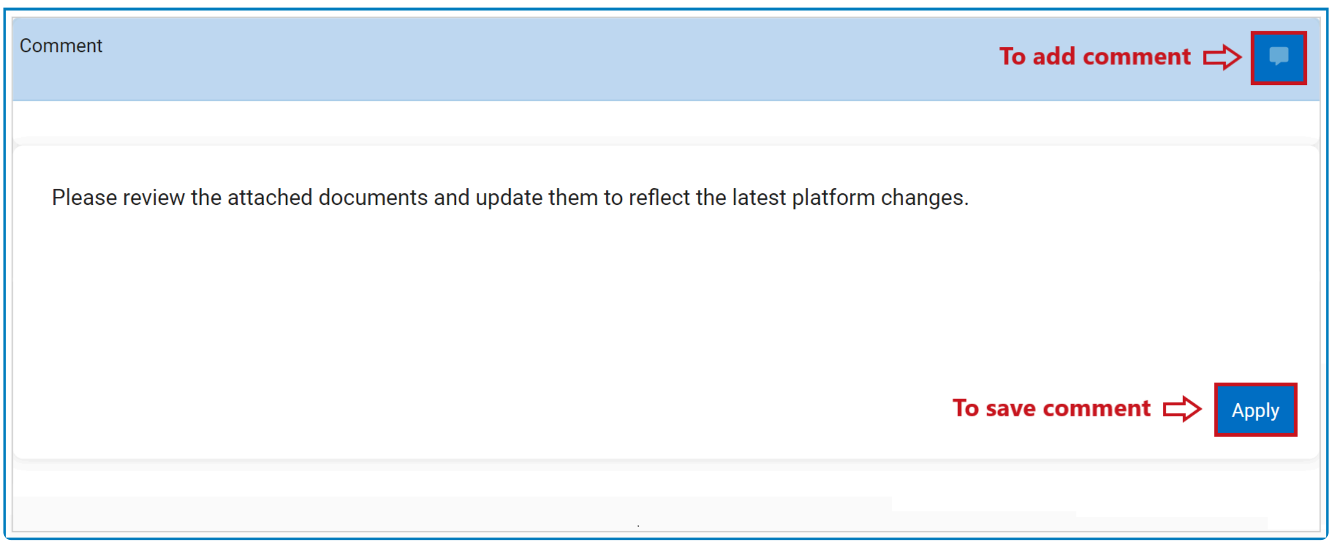
5.4. Comment Controls

In certain forms, users are provided access to comment controls, which enable them to input any relevant comments they may have regarding a given task,

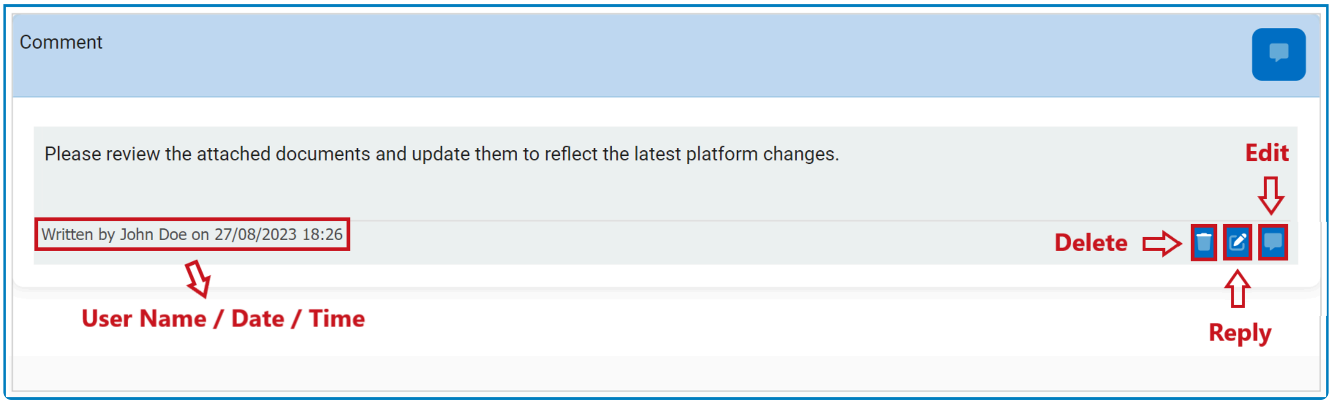


To use this function, follow the instructions below:

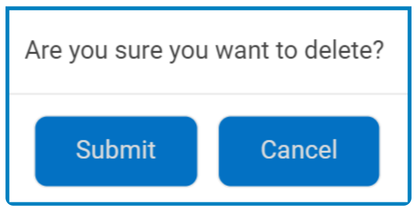
1. To add a comment, click on the  icon in the top right corner, input your comment(s) in the text field, and then click on the **Apply** button to save your work.



2. To edit a comment, click on the  icon in the bottom right corner, make changes as desired to the original comment, and then click on the **Apply** button to save your work.

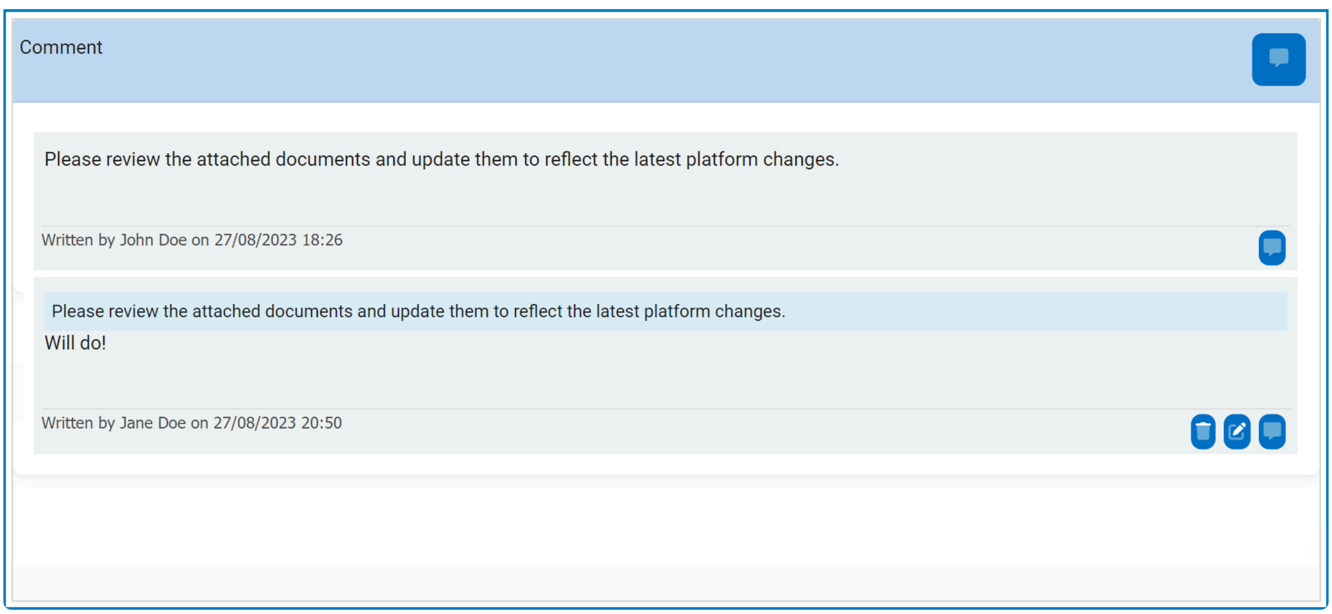


3. To delete a comment, click on the icon in the bottom left corner.
   - If selected, users will be alerted of the action with the following confirmation message:



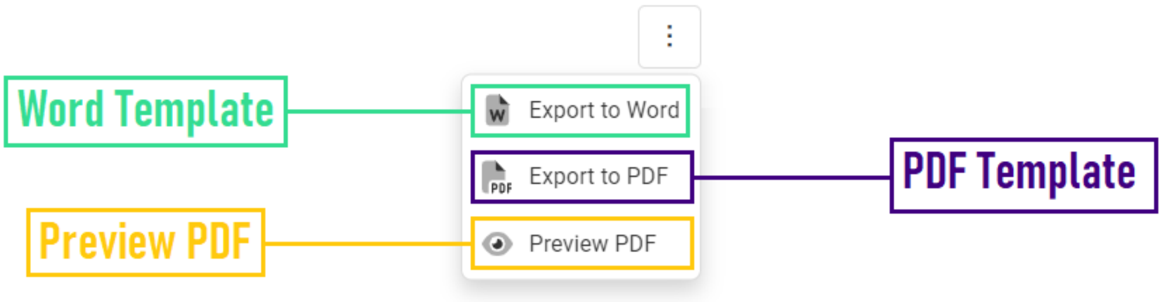
     - Click on either the **Submit** button to confirm the deletion or the **Cancel** button to cancel it.

4. To reply to a comment, click on the icon in the bottom right corner, input your reply, and then click on the **Apply** button again to save your work.



5.5. Templates

When enabled, templates can be accessed using the kebab (or three dots) menu located in the rightmost corner of the form.

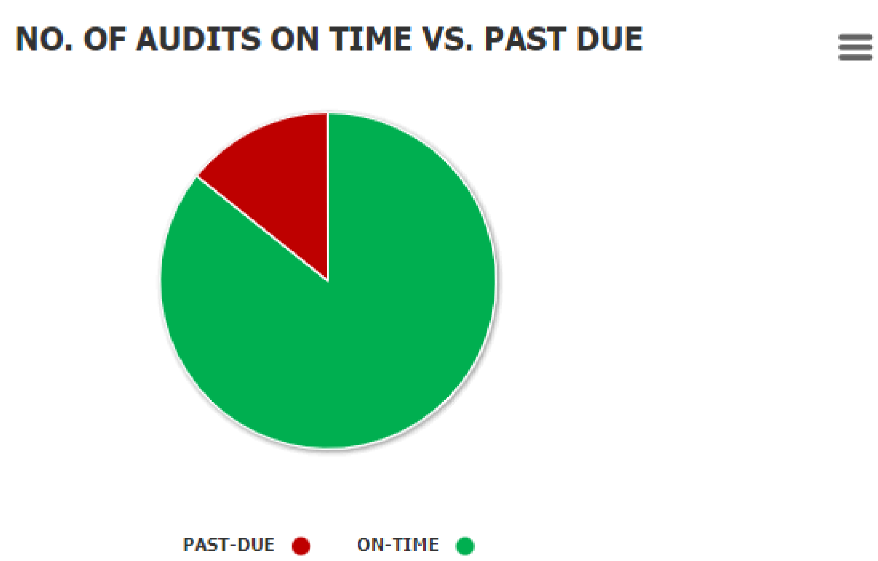


As outlined in the above image, using the available options in the menu, users can download a Word template, download a PDF template, or preview a PDF template.

5.6. Interactive Chart Controls

In certain forms, users are provided access to interactive chart controls.

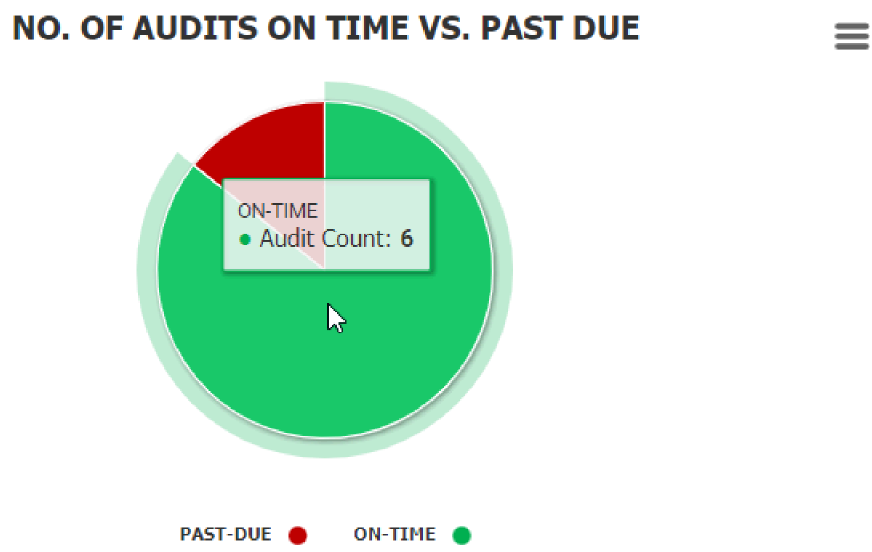
For those unfamiliar with using these controls, here are some key features to consider:



1. ***Chart Legend:*** This is a graphical element that provides a key for the data series displayed in the chart.

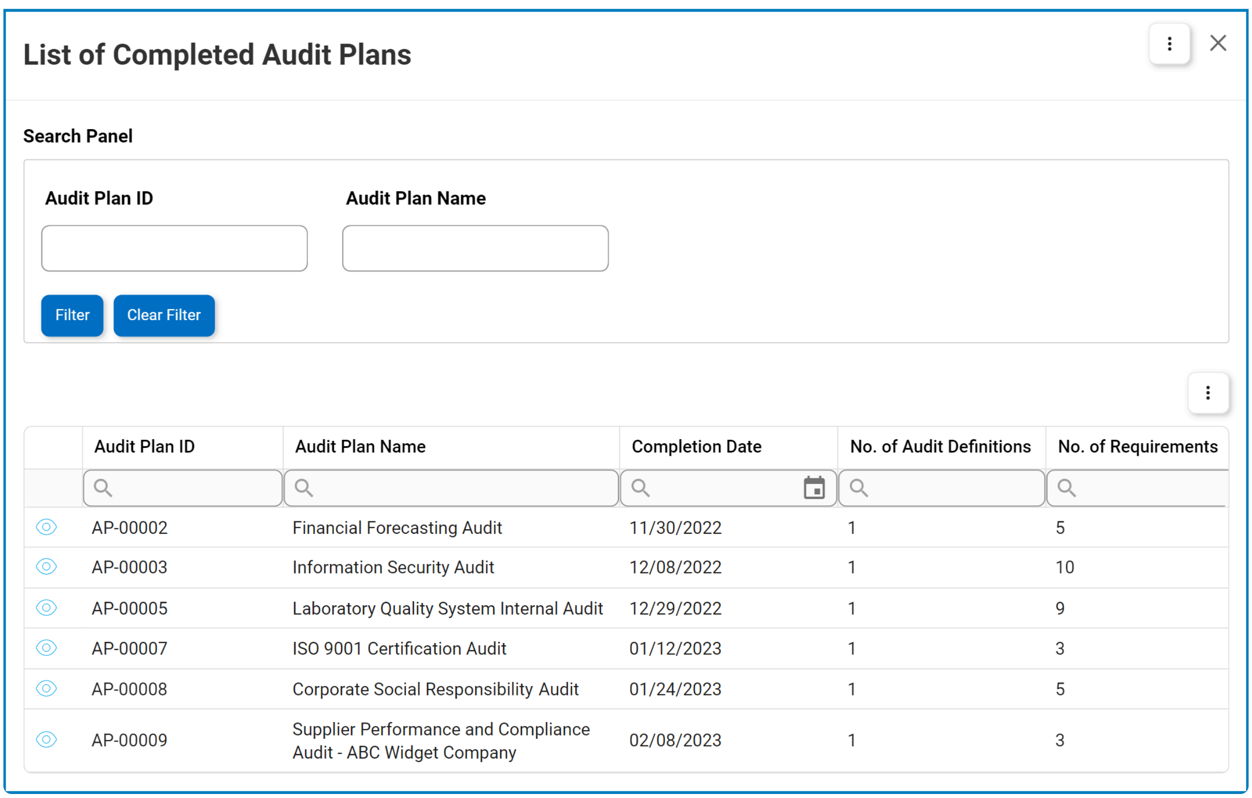
   - It includes color-coded labels or symbols that correspond to the data being displayed. Users can refer to the legend to better understand the data represented in the chart.

2. ***Chart Tooltip:*** This is a graphical element that appears when the user hovers over a data point or marker in the chart.



- It displays additional information about the data point, such as the label, value, or other contextual details. Users can use the tooltip to gain more insight into the data represented in the chart.

3. ***Drilldown Reports:*** These are data reports that users can access by double-clicking on the different data points in the chart. They allow users to navigate from the summary report visualized by the chart to the detailed report that created it.
    - For example, if users were to double-click on the sector of the pie chart representing audits that have been completed on time, a modal window would appear with the following form:



List of Completed Audit Plans

Search Panel

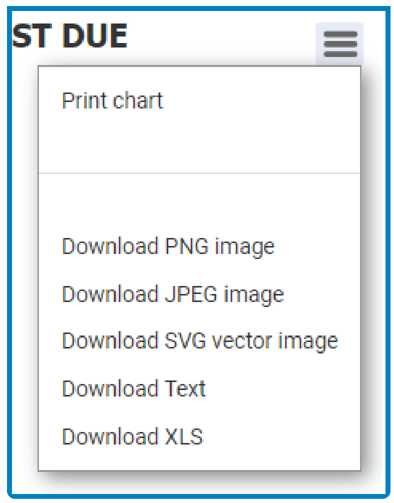
Audit Plan ID **Audit Plan Name**

Filter Clear Filter

Audit Plan ID	Audit Plan Name	Completion Date	No. of Audit Definitions	No. of Requirements
AP-00002	Financial Forecasting Audit	11/30/2022	1	5
AP-00003	Information Security Audit	12/08/2022	1	10
AP-00005	Laboratory Quality System Internal Audit	12/29/2022	1	9
AP-00007	ISO 9001 Certification Audit	01/12/2023	1	3
AP-00008	Corporate Social Responsibility Audit	01/24/2023	1	5
AP-00009	Supplier Performance and Compliance Audit - ABC Widget Company	02/08/2023	1	3

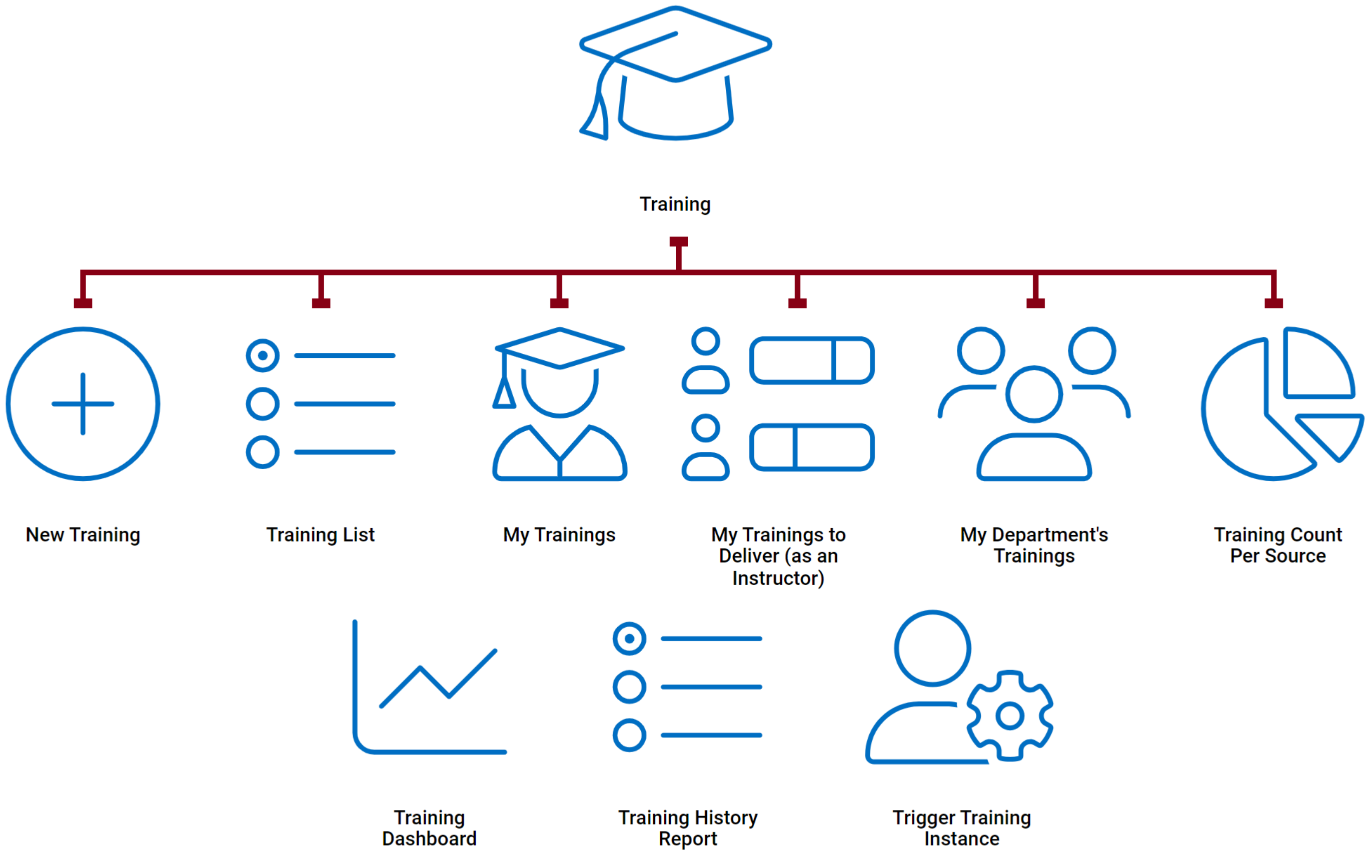
> ✱ Users can determine the contents of the modal window by creating the form and linking the corresponding form behavior to the control.

4. ***Chart Context Menus:*** These are hamburger buttons which, when collapsed, display a list of options that allow users to either print or download the chart.
    - Icon: 
    - If selected, it will display the following menu:



  - From the menu, users can choose to download the chart as a PNG image, JPEG image, SVG vector image, text file, or XLS file.

6. Training Application Overview

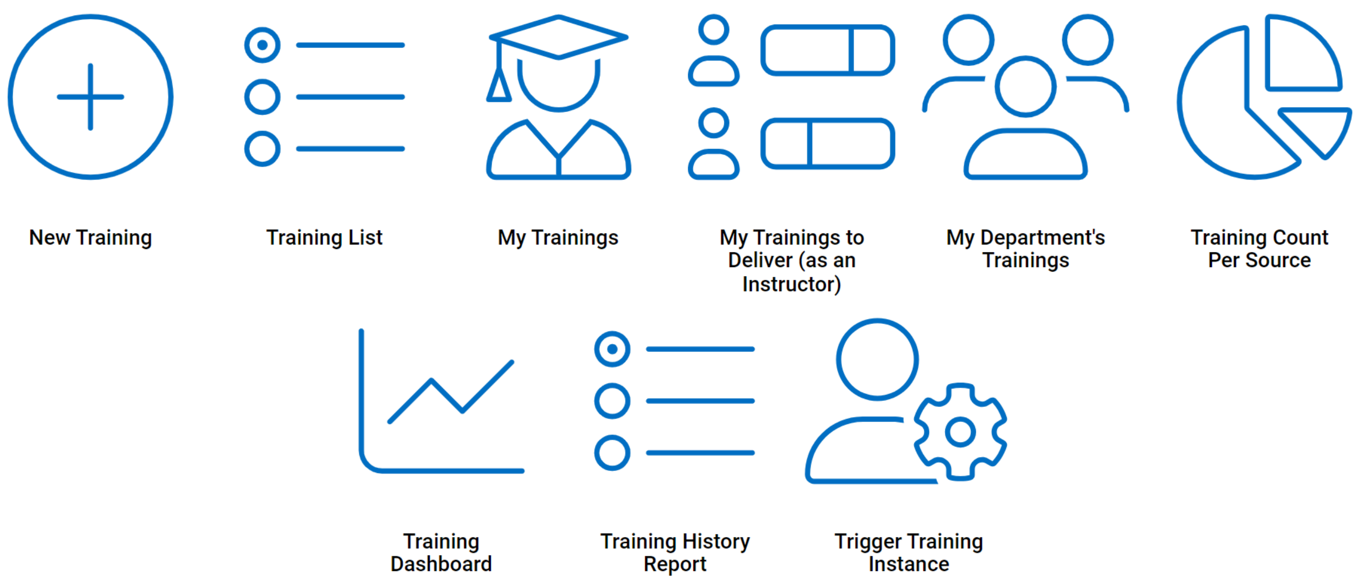


6.1. Accessing the Training Application

1. From the Home Page, click on **Training**.

Training

2. Selecting **Training** directs users to the following subcategories:
    - New Training
    - Training List
    - My Trainings
    - My Trainings to Deliver
    - My Team's Trainings
    - Training Count Per Source
    - Training Dashboard
    - Training History Report
    - Trigger Training Instance



7. EPC Integration

To be able to utilize the **Training** application to its fullest potential, it is necessary to first integrate/ synchronize the Digital Business Platform (DBP) with the Enterprise Process Center (EPC).

- Why?
  - In the **Training** application, for a workflow to take place, a training needs to be assigned to at least one receiver—that is, a department, role, user, and/or group. As a result, if for example a training were to be assigned to a DBP user and they were not synchronized with EPC, they would not receive the training in EPC because the IDs would not match.
    - Generally, all environments, departments, roles, and users are created in EPC, and through the Synchronization with EPC application, we are able to be move them to the DBP.
    - It is also possible, however, to create receivers in DBP using the Organization Management [Admin] application and then transfer them to EPC using the **Synchronization with EPC** application.

> ! Groups cannot be synced with EPC as they are unique to DBP.

- For more information on the benefits of EPC integration, click here.

7.1. Synchronization with EPC

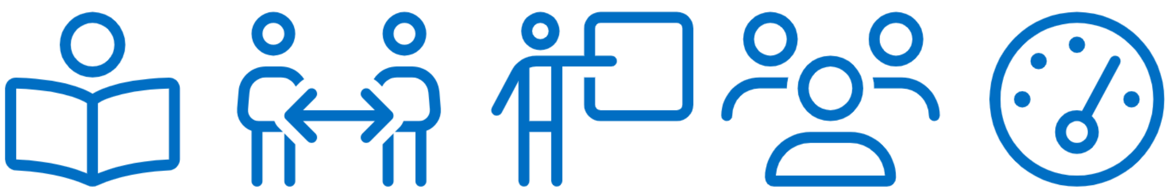
To synchronize with EPC, users will need the **Synchronization with EPC** application.

To access this application, refer to the following steps:

1. From the Home Page, click on **Admin App**.

Admin App

2. Selecting **Admin App** directs users to the following subcategories:

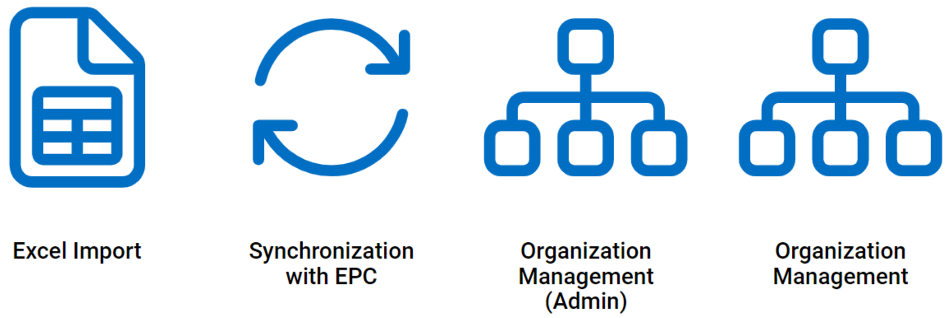


Manual | Task Administration | Form Behaviour | User Management | General Dashboard

3. Click on **User Management**.

User Management

4. Selecting **User Management** directs users to the following subcategories:



5. Click on **Synchronization with EPC**.
    - Using this application, users can synchronize departments, users, and/or roles with EPC.
        - For more information on how this application works, click here.

7.2. Organization Management (Admin)

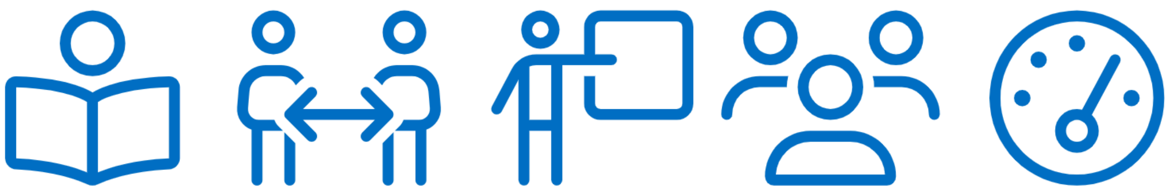
To set up departments, users, roles, and groups in DBP, you will need the **Organization Management (Admin)** application.

To access this application, refer to the following steps:

1. From the Home Page, click on **Admin App**.

Admin App

2. Selecting **Admin App** directs users to the following subcategories:

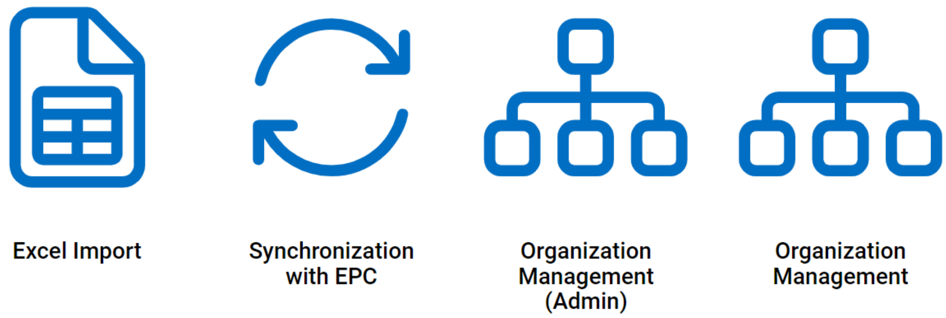


Manual | Task Administration | Form Behaviour | User Management | General Dashboard

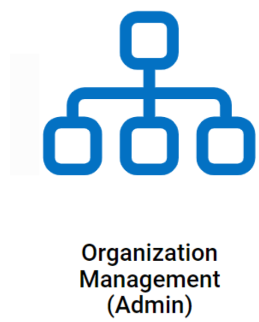
3. Click on **User Management**.

User Management

4. Selecting **User Management** directs users to the following subcategories:



5. Click on **Organization Management (Admin)**.
    - Using this application, users with administrative rights can create and edit departments, users, roles, and groups in DBP. These entities (with the exception of groups) can then be synced with EPC using the Synchronization with EPC application.
        - For more information on how the **Organization Management (Admin)** application works, click here.



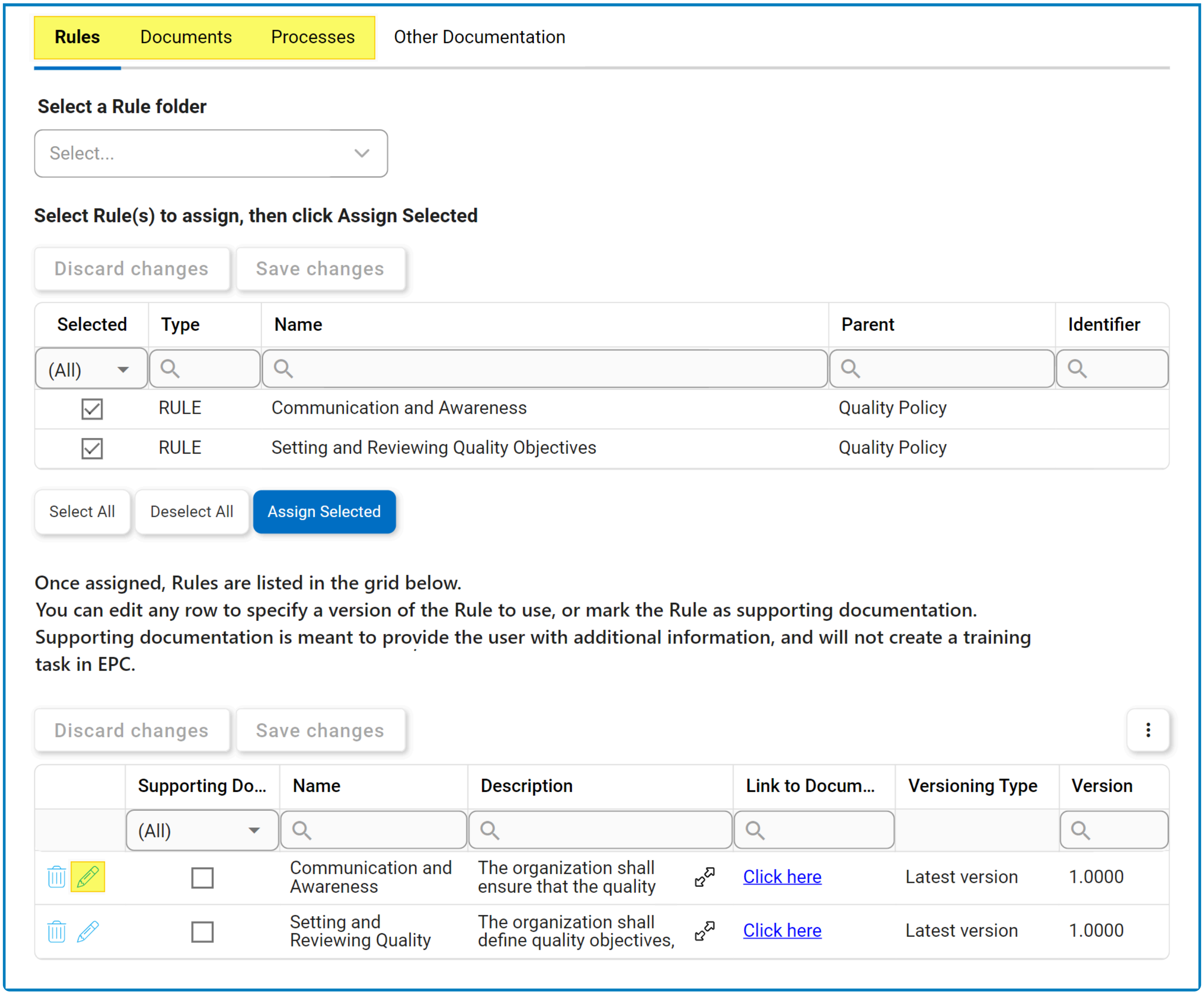
7.3. Benefits to EPC Integration

There are two key benefits to EPC integration:

1. Editing EPC Objects
2. Notifications in EPC

7.3.1. Editing EPC Objects

When defining or editing a training using the **Training** application, users can edit the associated EPC objects—that is, the rules, documents and/or processes which form or support the training content. For more details on this matter, click here.



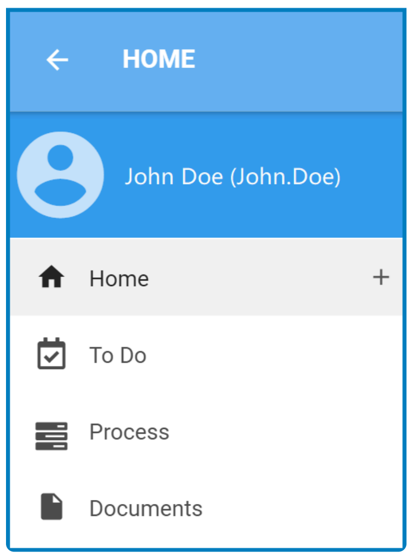
7.3.2. Notifications in EPC

Once a training has been defined, reviewed, and initiated using the **Training** application, the assigned trainee(s) will receive a notification in EPC. This notification is displayed in the **To Do** module.

To access the **To Do** module, refer to the following steps:

1. From the navigation bar of the EPC home screen, click on the module explorer (farthest left).

2. From the module explorer, click on the **To Do** module.



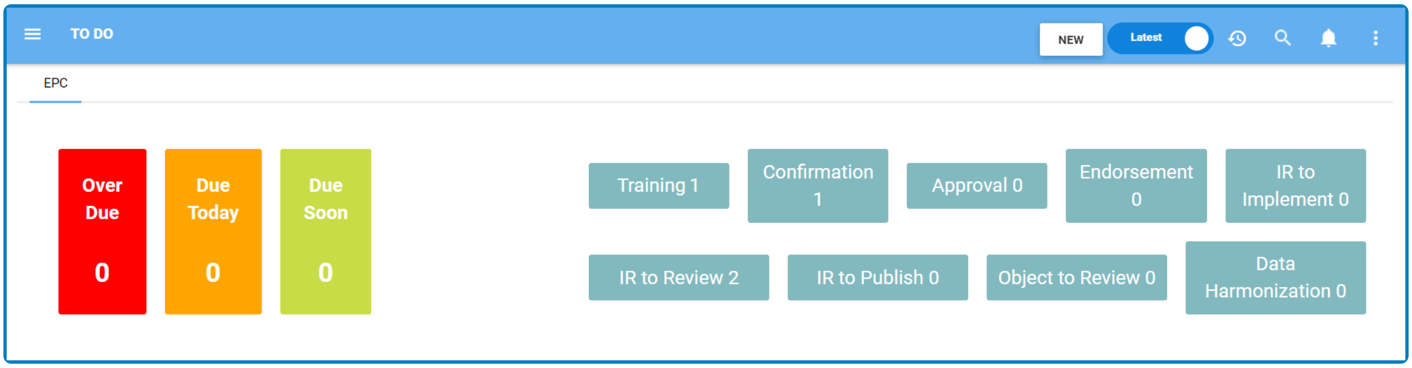
- For more details on this module, click here.

7.3.2.1. EPC – To Do

In the **To Do** module, users can access a list of all items assigned to them.

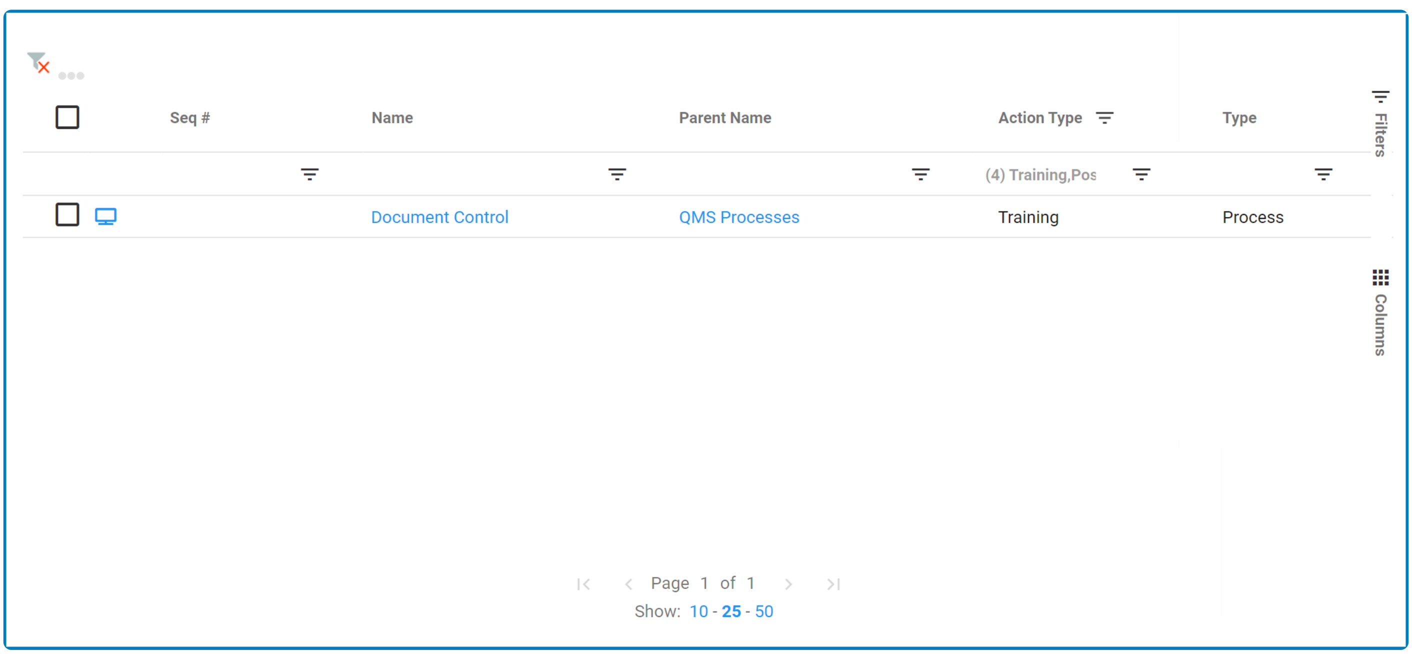
To Do – Filters

Users can filter for trainings by clicking on the Training filter at the top of the screen. Users can also filter by important deadlines (Over Due, Due Today, Due Soon).



To Do – Grid

If a user is assigned a training, it will be displayed in this grid.

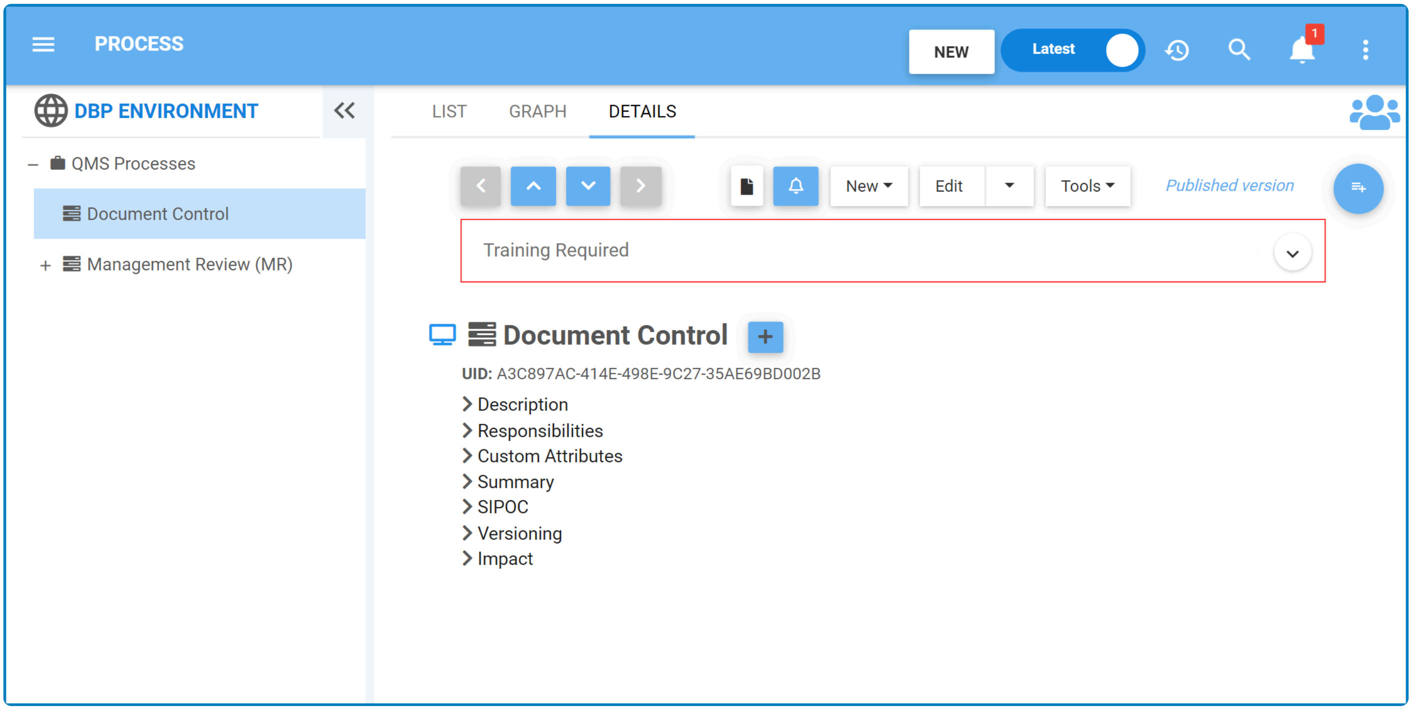


- If a user were to click on one of the trainings in the grid, it would direct them to the module associated with the training.
    - A training related to an EPC rule directs users to the **Rule** module.
    - A training related to an EPC document directs users to the **Document** module.

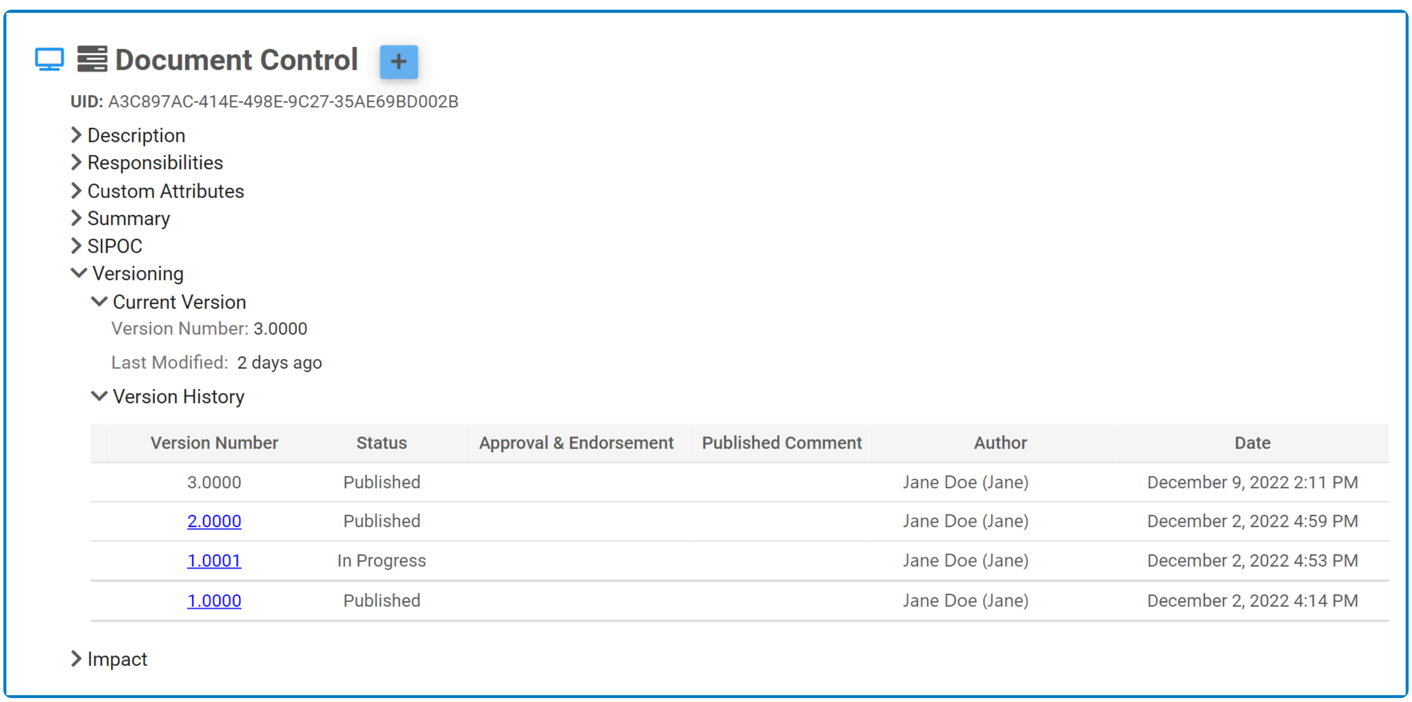
    - A training related to an EPC process directs users to the **Process** module.
- For more details on these modules, click here.

7.3.2.1.1. Rule/Document/Process Module

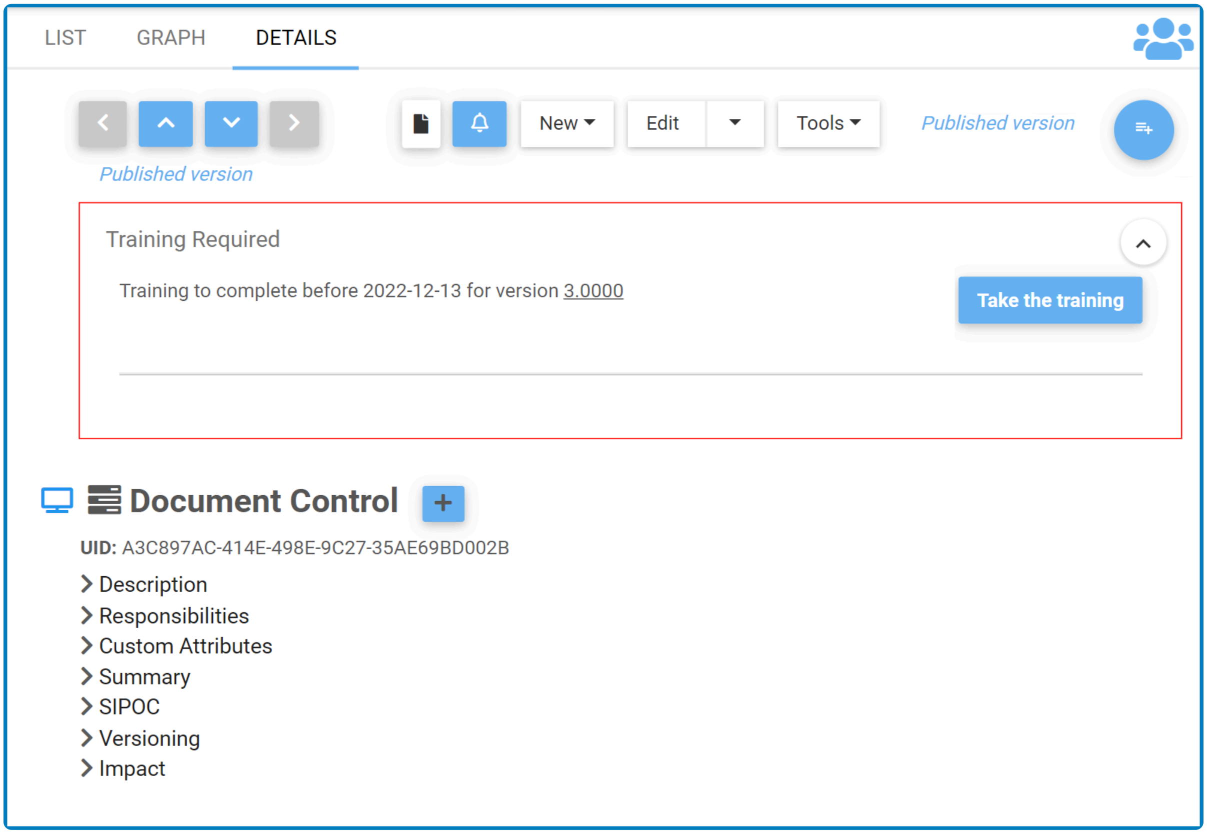
In the associated module, users can access details about the training.



Under the training heading, users can expand subheadings to reveal more information.



Users can also access the training itself by clicking on the symbol inside the **Training Required** box.



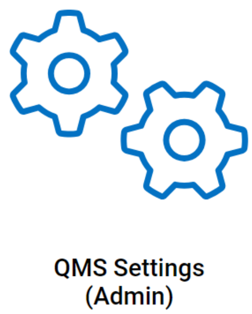
This notification box, once expanded, informs users both of the training they need to complete and the date they need to complete it by. It also provides them with a link to the training. Upon clicking the **Take the Training** button, users will be directed to the task in DBP.

8. Settings

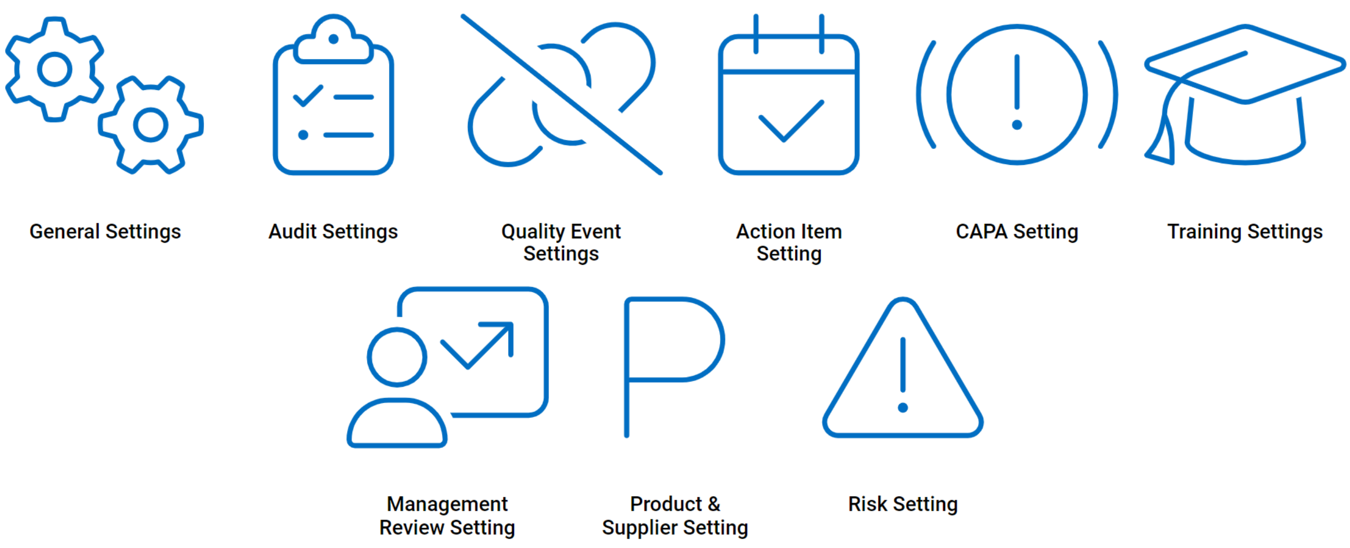
In the **QMS Settings** section of the **QMS** application suite, users can configure the settings for the **Quality Event** application.

To access **QMS Settings**, use the following steps:

1. From the Home Page, click on **QMS Settings (Admin)**.



2. Selecting **QMS Settings (Admin)** directs users to the following subcategories:

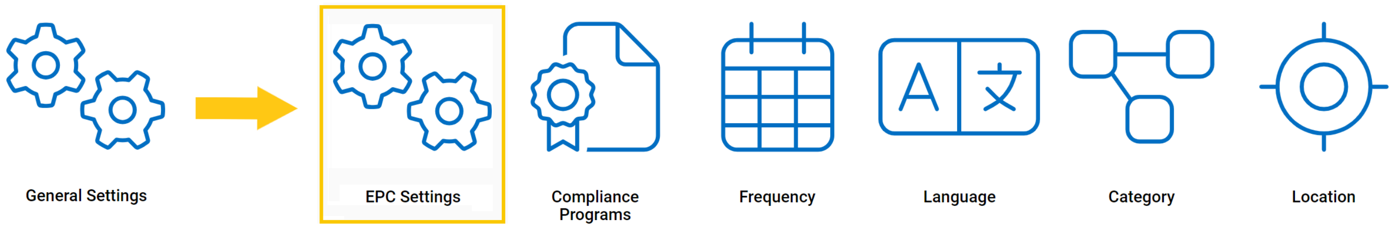


3. There are two modules from this list that are relevant to the **Training** application:
   - General Settings
   - Training Settings

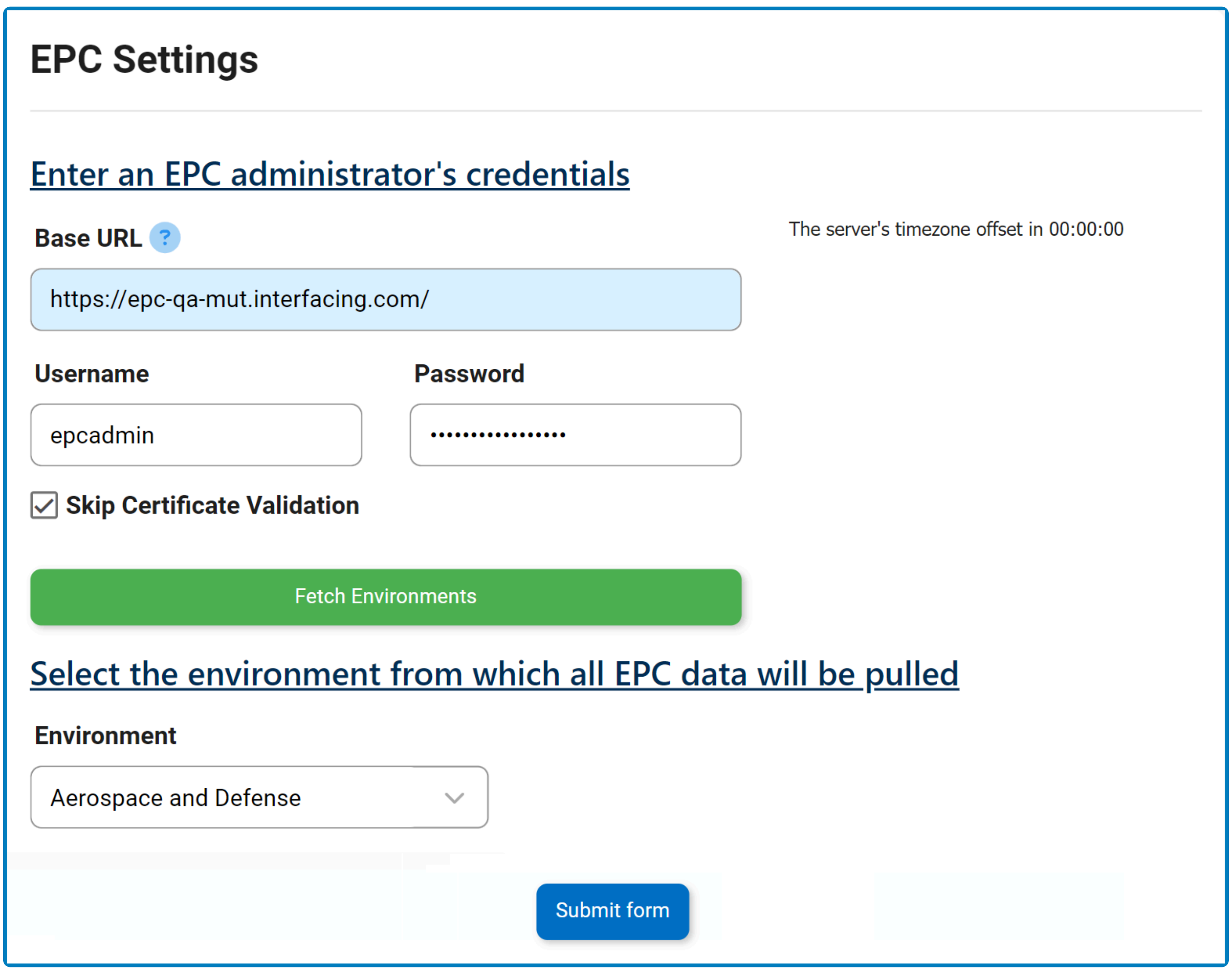

General Settings
Audit Settings
Quality Event Settings
Action Item Setting
CAPA Setting
Training Settings
Management Review Setting
Product & Supplier Setting
Risk Setting

8.1. General Settings

In this section, users can access the **EPC Settings** module, which allows users to set the EPC environment from which they want data to be pulled.



Setting EPC Environment



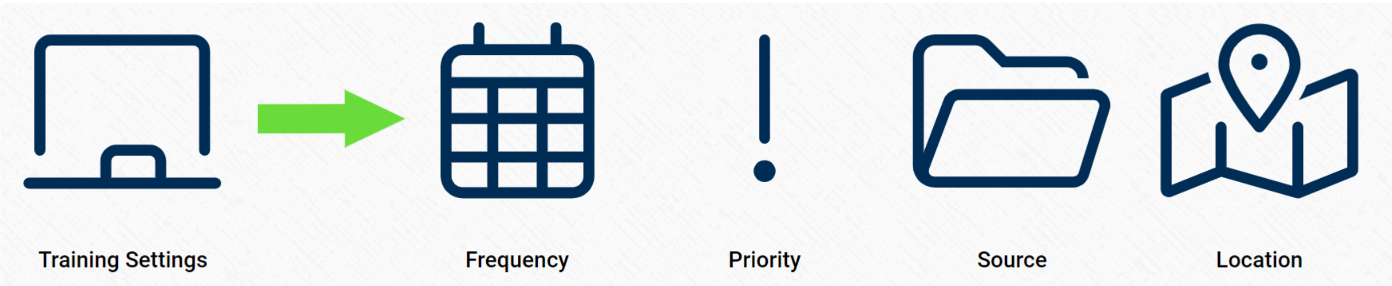
1. ***Base URL:*** This is a text field that allows users to input the base URL of the EPC server. It is a mandatory field.
2. ***Username:*** This is a text field that allows users to input the username.

3. ***Password:*** This is a text field that allows users to input the password.
4. ***Skip Certification Validation:*** This is a checkbox which, if enabled, allows users to skip certification validation.
5. ***Fetch Environments:*** This button allows users to fetch the list of environments from the selected EPC server.
6. ***Environment:*** This is a single-select dropdown field that retrieves the list of environments from EPC. It allows users to select only one value from the dropdown.
7. ***Submit Form:*** This button allows users to submit the form.

8.2. Training Settings

Selecting **Training Settings** directs users to the following subcategories:

1. Frequency
2. Location
3. Priority
4. Source

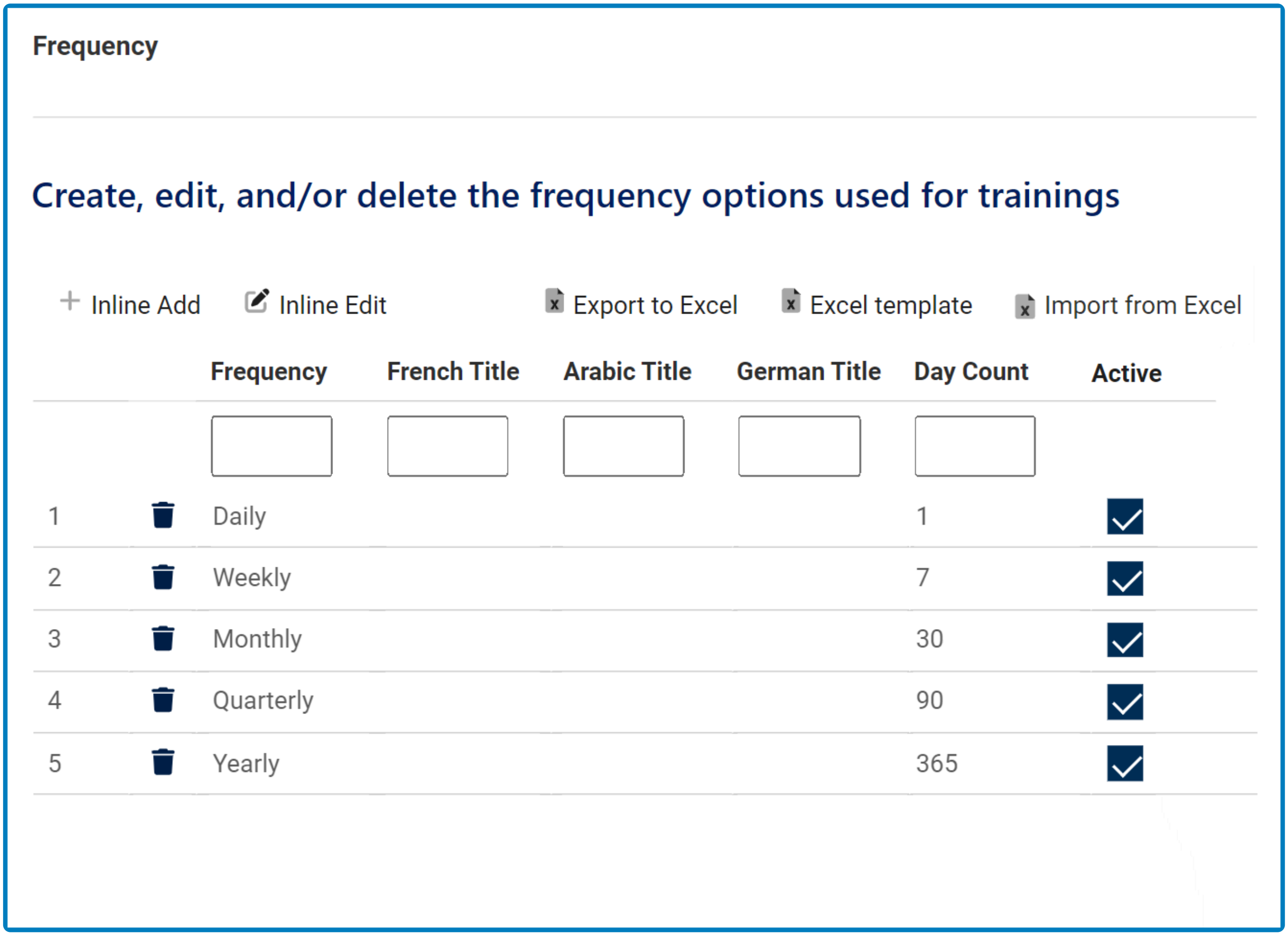


8.2.1. Frequency

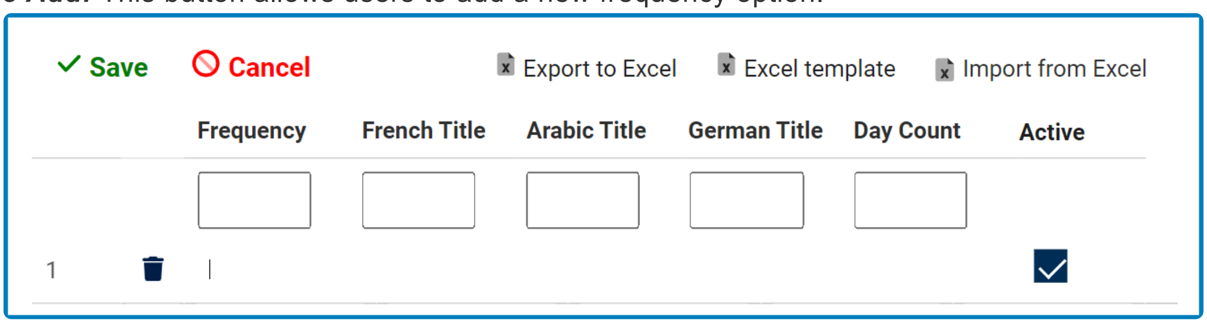
In this section, users can create, edit, and delete the frequency options displayed in the **Frequency** dropdown. This dropdown is found in the New Training form.

Defining Frequency Options

Although the specific features of this form will be delved into below, it essentially functions the same as any form with an editable grid control—that is, one with **Inline Add/Inline Edit** functions. For more details on this type of grid and its features, click here.



1. ***Inline Add:*** This button allows users to add a new frequency option.



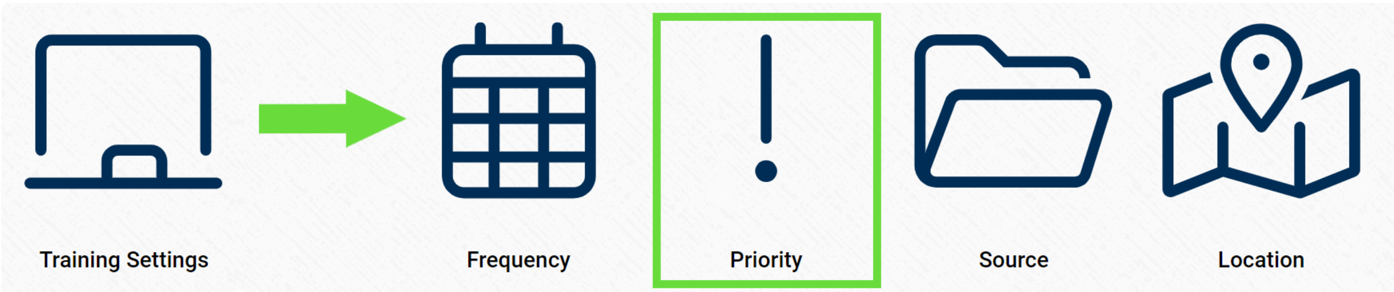
   - ***Frequency/Title:*** This is a text field that allows users to input the title(s) of the frequency option (in English [default], French, Arabic, or German). It is a mandatory field.
   - ***Day Count:*** This is a numeric field that allows users to input the day count.
   - ***Active:*** This is a checkbox which, if enabled, allows for the frequency option to be displayed in the **Frequency** dropdown.
     - This checkbox is automatically enabled whenever a new frequency option is added; however, if users do not want the frequency option to be displayed, they can still manually deselect the checkbox.
2. ***Inline Edit:*** This button allows users to edit an existing frequency option.
3. ***Delete:*** This button allows users to delete a frequency option.

- For more details on this function, click here.

4. ***Export/Template/Import:*** These buttons allow users to perform Excel-related activities.
    - For more details on these functions, click here.

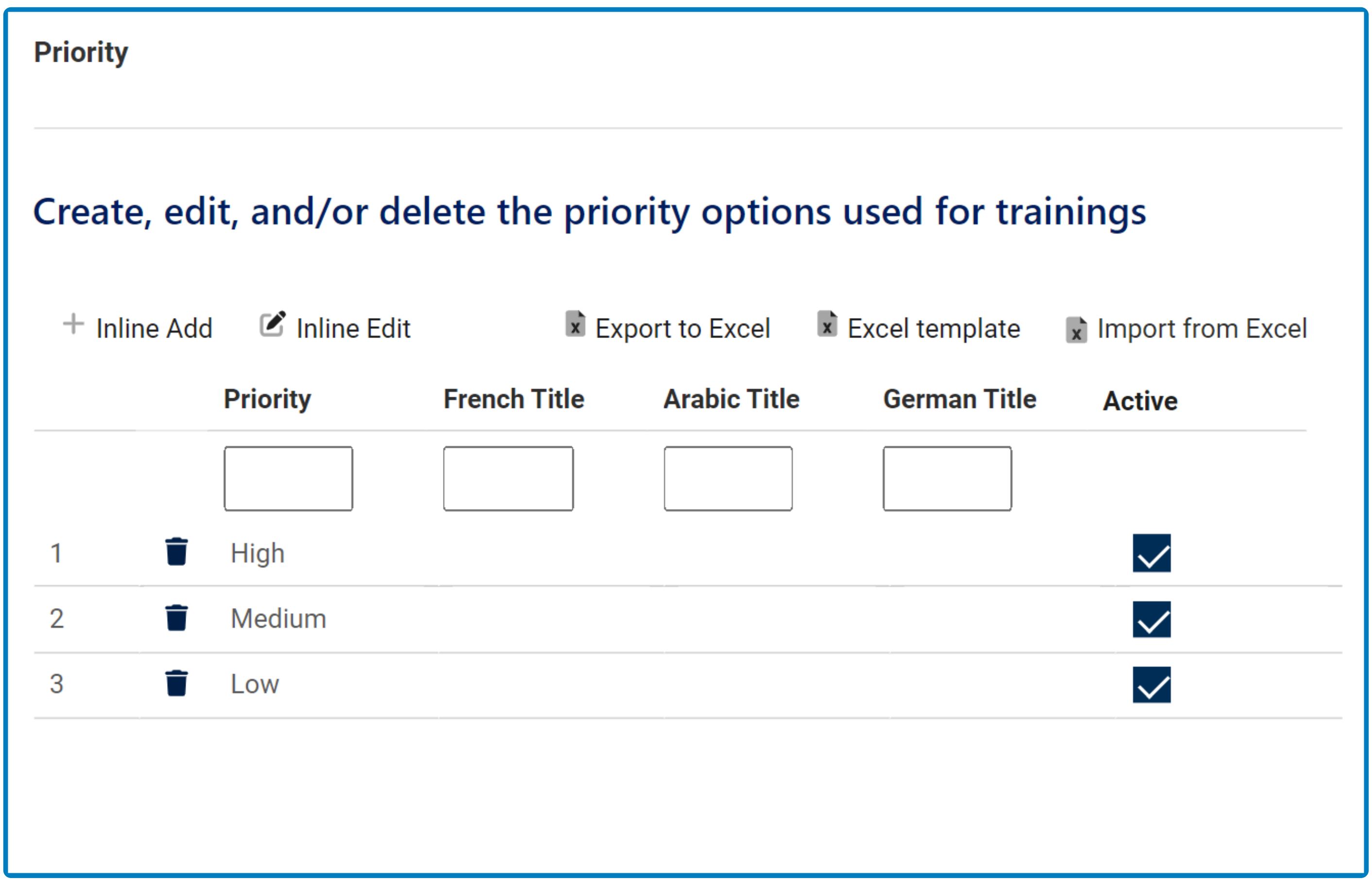
8.2.2. Priority

In this section, users can create, edit, and delete the priority options displayed in the **Priority** dropdown. This dropdown is found in the New Training form.

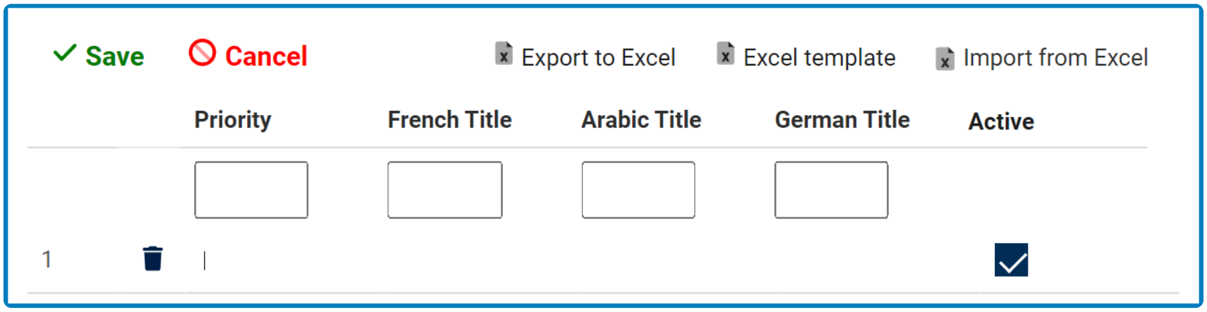


Defining Priority Levels

Although the specific features of this form will be delved into below, it essentially functions the same as any form with an editable grid control—that is, one with **Inline Add/Inline Edit** functions. For more details on this type of grid and its features, click here.



1. ***Inline Add:*** This button allows users to add a new priority option.



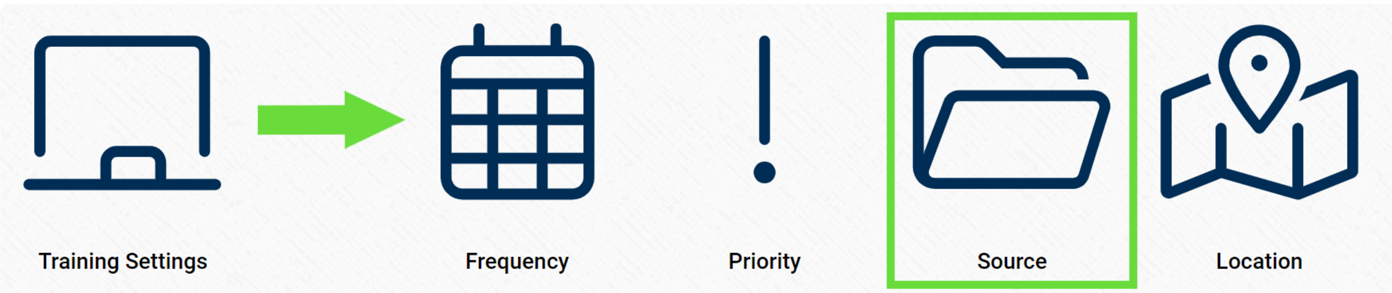
- ***Priority/Title:*** This is a text field that allows users to input the name(s) of the priority option (in English [default], French, Arabic, or German). It is a mandatory field.
- ***Active:*** This is a checkbox which, if enabled, allows for the priority option to be displayed in the **Priority** dropdown.
  - This checkbox is automatically enabled whenever a new priority option is added; however, if users do not want the priority option to be displayed, they can still manually deselect the checkbox.

2. ***Inline Edit:*** This button allows users to edit an existing priority option.
3. ***Delete:*** This button allows users to delete a priority option.
   - For more details on this function, click here.
4. ***Export/Template/Import:*** These buttons allow users to perform Excel-related activities.
   - For more details on these functions, click here.

8.2.3. Source

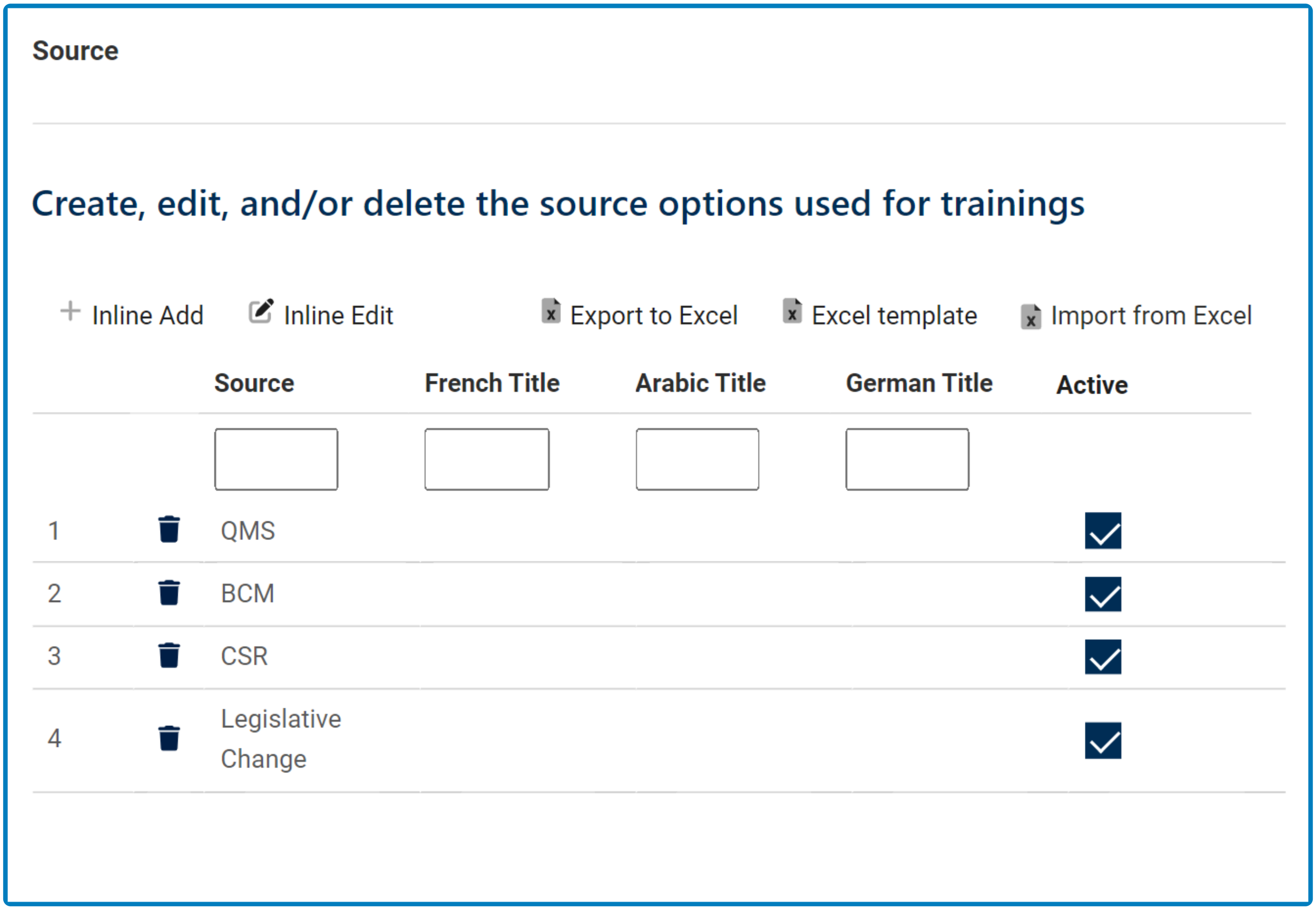
In this section, users can create, edit, and delete the source options displayed in the **Source** dropdown. This dropdown is found in the New Training form.

> Source, here, specifically refers to the root source that is driving the training. It is a higher-level categorization.

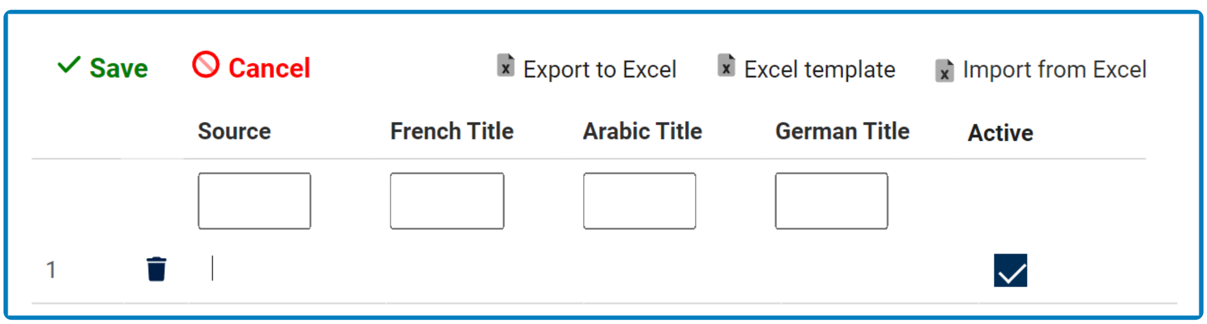


Defining Source Options

Although the specific features of this form will be delved into below, it essentially functions the same as any form with an editable grid control—that is, one with **Inline Add/Inline Edit** functions. For more details on this type of grid and its features, click here.



1. ***Inline Add:*** This button allows users to add a new source.



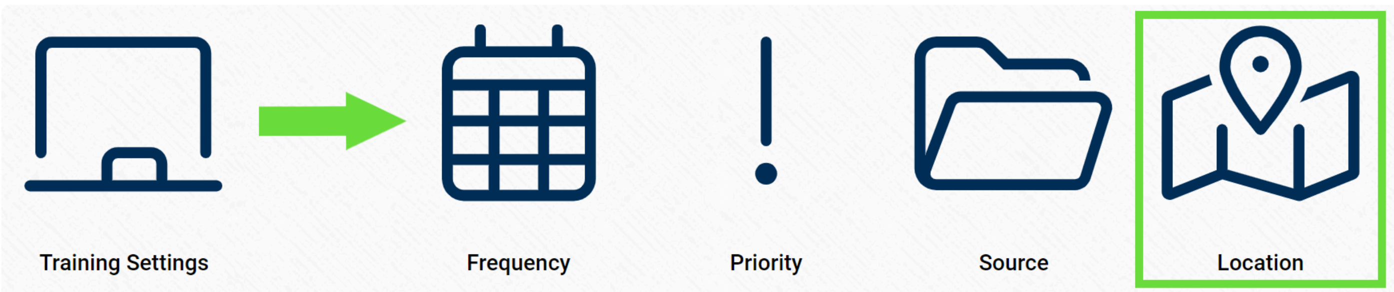
   - ***Source/Title:*** This is a text field that allows users to input the title(s) of the source option (in English [default], French, Arabic, or German). It is a mandatory field.
   - ***Active:*** This is a checkbox which, if enabled, allows for the source option to be displayed in the **Source** dropdown.
     - This checkbox is automatically enabled whenever a new source option is added; however, if users do not want the source option to be displayed, they can still manually deselect the checkbox.
2. ***Inline Edit:*** This button allows users to edit an existing source.
3. ***Delete:*** This button allows users to delete a source option.
   - For more details on this function, click here.
4. ***Export/Template/Import:*** These buttons allow users to perform Excel-related activities.

- For more details on these functions, click here.

8.2.4. Location

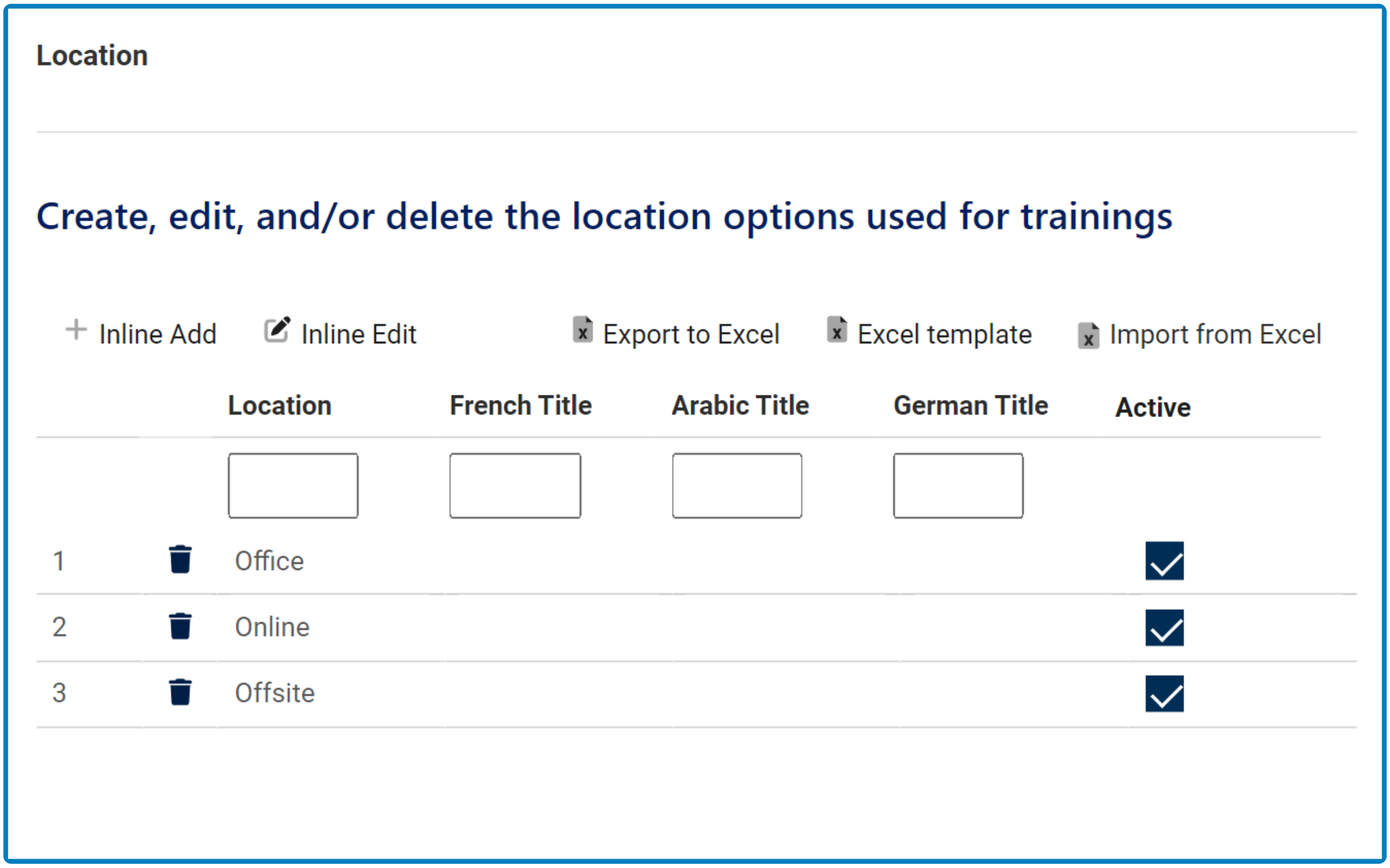
In this section, users can create, edit, and delete the location options displayed in the **Source** dropdown. This dropdown is found in the New Training form.

Location, here, specifically refers to the location where the training will be conducted.

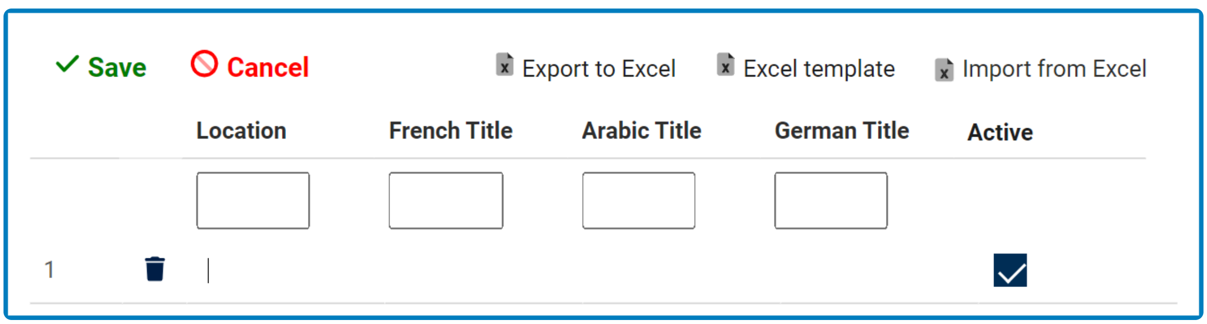


Defining Location Options

Although the specific features of this form will be delved into below, it essentially functions the same as any form with an editable grid control—that is, one with **Inline Add/Inline Edit** functions. For more details on this type of grid and its features, click here.



1. ***Inline Add:*** This button allows users to add a new location.



   - ***Location/Title:*** This is a text field that allows users to input the title(s) of the location option (in English [default], French, Arabic, or German). It is a mandatory field.
   - ***Active:*** This is a checkbox which, if enabled, allows for the location option to be displayed in the **Location** dropdown.
     - This checkbox is automatically enabled whenever a new location option is added; however, if users do not want the location option to be displayed, they can still manually deselect the checkbox.
2. ***Inline Edit:*** This button allows users to edit an existing location.
3. ***Delete:*** This button allows users to delete a location option.
   - For more details on this function, click here.
4. ***Export/Template/Import:*** These buttons allow users to perform Excel-related activities.
   - For more details on these functions, click here.

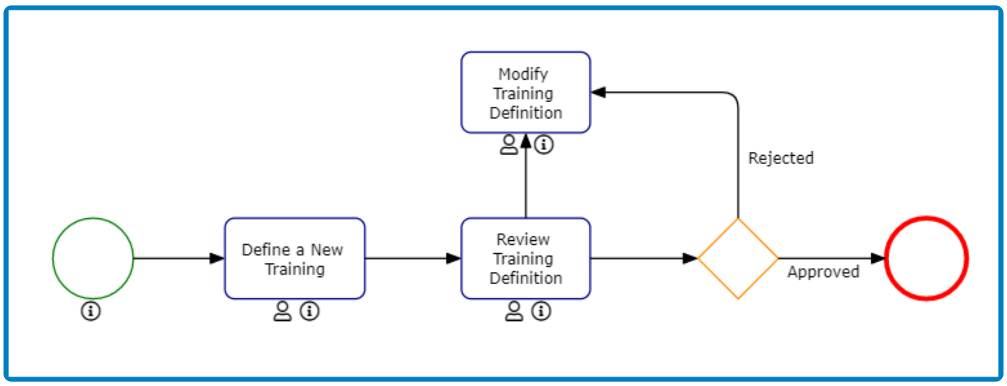
9. Training Application Forms and Workflows

In the sections of the manual that follow, we will be delving into the various forms and workflows of the **Training** application.

Generally, the workflows of the **Training** application can be divided into two supersets:

1. **Define Trainings**

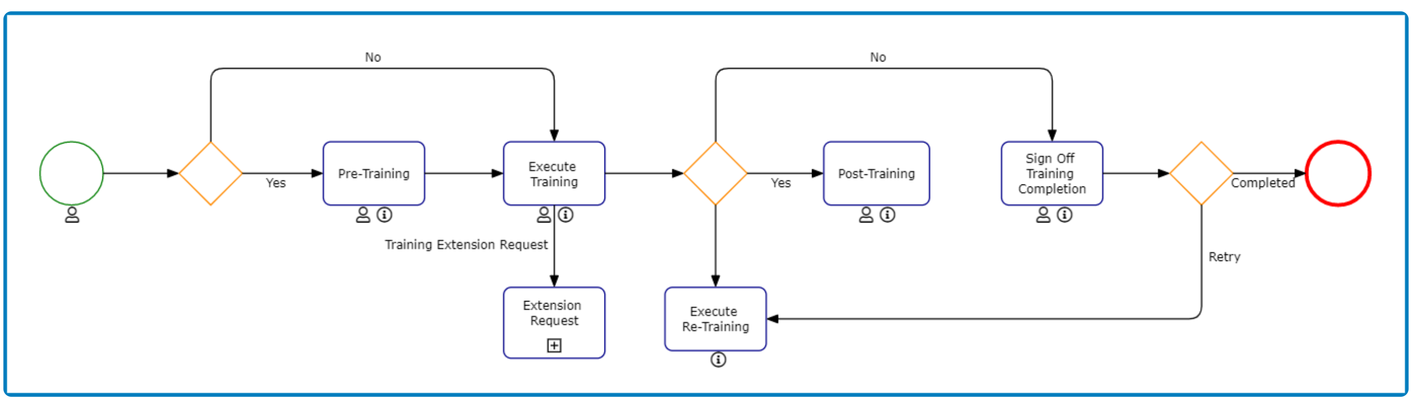
This workflow consists of three primary stages: Define a New Training, Review Training Definition, and Modify Training Definition.



** Although the Modify form is part of this workflow, it is only issued if the training definition is rejected by the reviewer.

2. **Conduct Trainings**

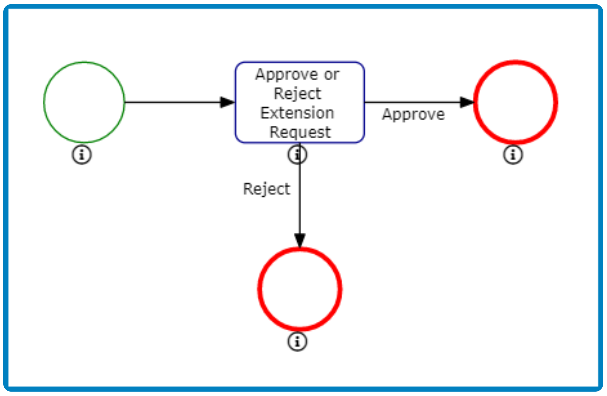
This workflow consists of four primary stages: Pre-Training, Execute Training, Post-Training, and Sign-Off Training Completion.



** Although the Pre-Training and Post-Training tasks are part of this workflow, they are only issued if they have previously been set up in the New Training form.

The Conduct Trainings workflow also encompasses another workflow:

- **Request Extension**
    - This workflow consists of two primary stages: Request Extension for Training and Approve or Reject Extension Request.



10. New Training

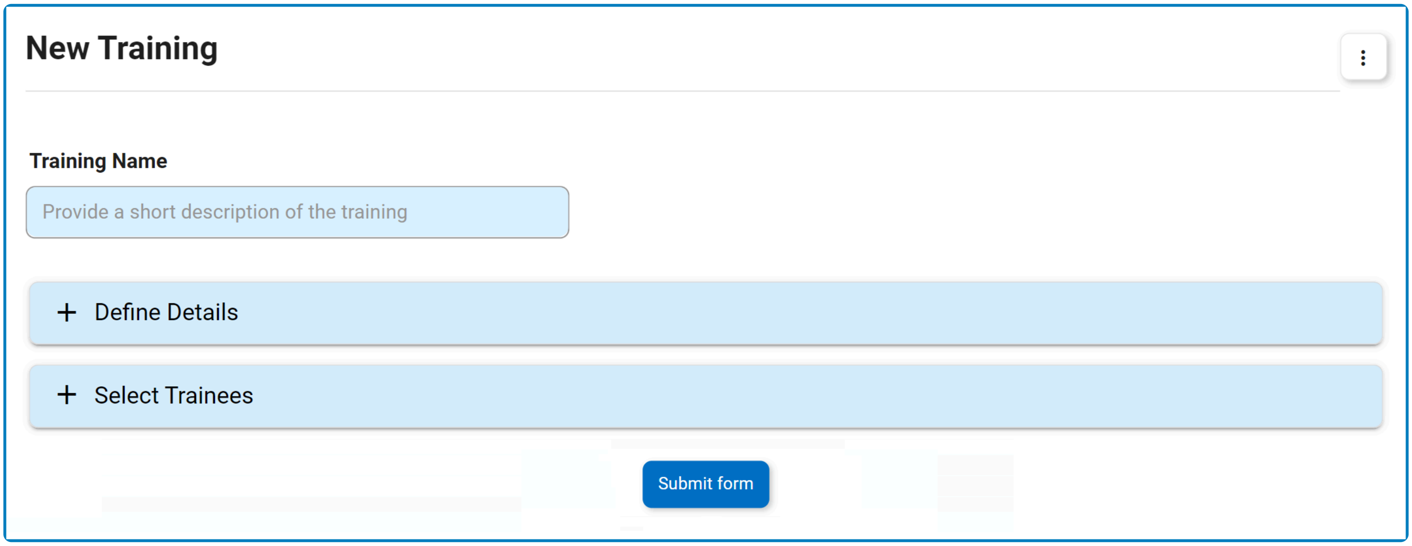
In this module, users can create a new training. Upon submission, it will trigger the Define Trainings workflow. Users will be guided on how to navigate this workflow throughout the **New Training** portion of this manual.

For the purposes of ease and clarity, the New Training form has been divided into several subsections within this manual.

- For more details on the contents of this form, click here.

10.1. New Training Instance

In the New Training form, users can create and customize the training program to align with their specific needs and preferences.

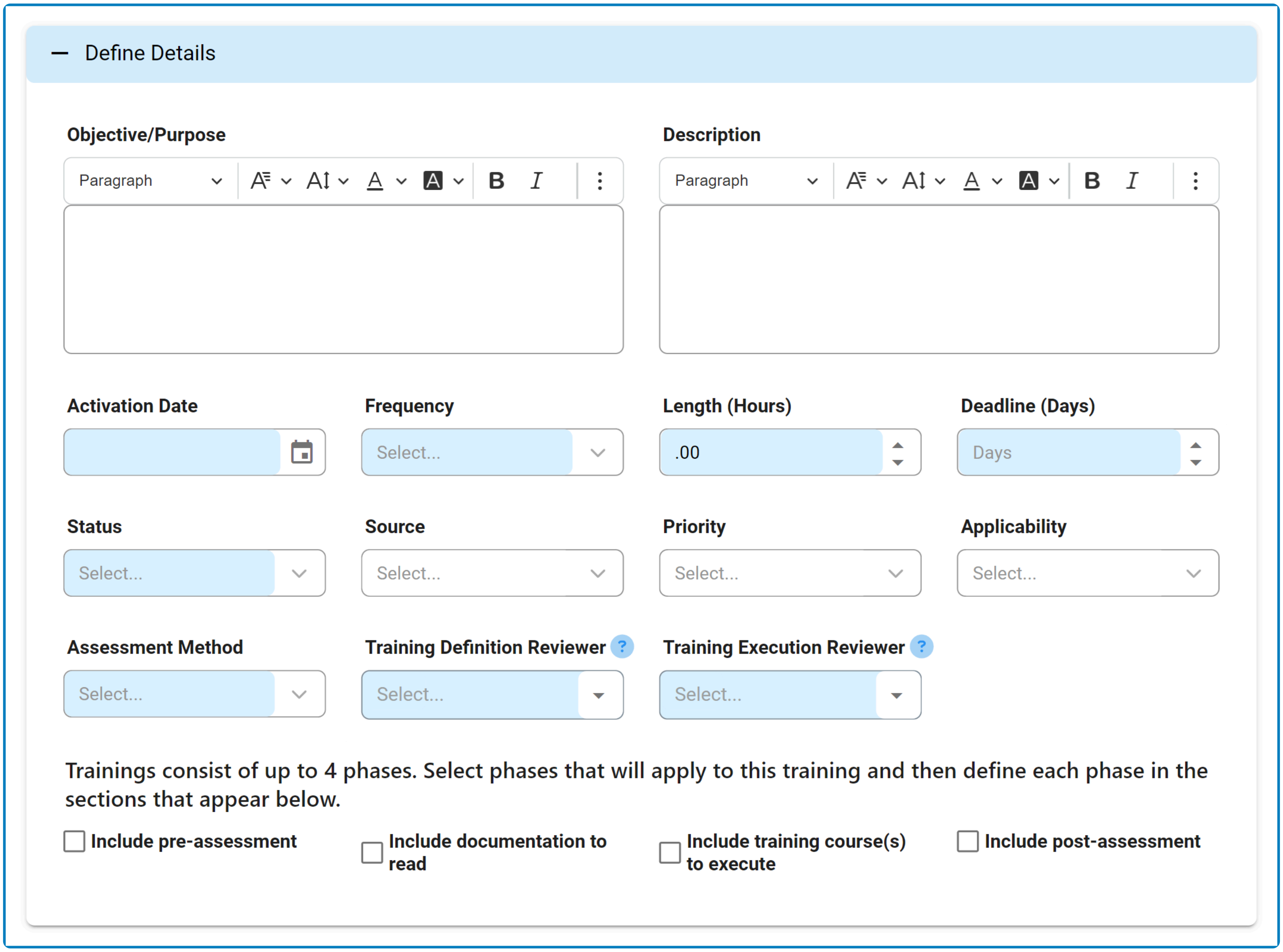


1. ***Training Name:*** This is a text field that allows users to input the name of the training. It is a mandatory field.
2. ***Accordions:*** The form includes collapsible sections, known as accordions, which each serve a specific purpose.
    - Define Details
    - Select Trainees
3. ***Submit Form:*** This button allows users to submit the completed form.
    - Once the New Training form has been submitted, it will be sent for review.

> To access additional options or perform actions related to the form, please utilize the kebab menu (⋮) located in the upper rightmost corner.

10.1.1. Define Details

In this section of the New Training form, users can define the details that shape the training program.



For guidance on common form functions, please refer to the dedicated section in the manual.

1. ***Objective/Purpose:*** This is a rich text field that allows users to input the objective or purpose of the training.
2. ***Description:*** This is a rich text field that allows users to input a description of the training.
3. ***Activation Date:*** This is a date picker that allows users to input/select the date on which the training becomes active. It is a mandatory field.
4. ***Frequency:*** This is a single-select dropdown field that retrieves the list of predefined frequencies. It is a mandatory field. It allows users to specify the frequency at which the training will be conducted.
   - Frequency options are created in the Frequency section of **Training Settings**.
5. ***Length (Hours):*** This is a numeric field that allows users to input the duration of the training in hours.

It is a mandatory field.

6. ***Deadline (Days):*** This is a numeric field that allows users to input the deadline for completing the training in terms of days. It is a mandatory field.
7. ***Status:*** This is a single-select dropdown field that displays the list of statuses. It is a mandatory field. It allows users to select the status of the training.
   - Statuses: Active or Inactive.
8. ***Source:*** This is a single-select dropdown field that retrieves the list of predefined sources.
   - Source, here, specifically refers to the root source that is driving the training. It is a higher-level categorization.
   - Source options are created in the Source section of **Training Settings**.
9. ***Priority:*** This is a single-select dropdown field that retrieves the list of predefined priority levels. It allows users to select the priority level of the training.
   - Priority levels are created in the Priority section of **Training Settings**.
10. ***Applicability:*** This is a single-select dropdown field that displays the list of training applicability options. It is a mandatory field.
    - Applicability Options: Mandatory, Optional, or Recommended.
      - If the applicability for the training is set as mandatory, the team manager will only be able to declare the training as complete for the trainees (in the My Team's Trainings form).
      - If the applicability for the training is not set as mandatory, however, the team manager will be able to declare the training as either complete or not applicable for the trainees.
11. ***Assessment Method:*** This is a single-select dropdown field that displays the list of assessment methods. It is a mandatory field. It allows users to select the method by which trainee performance will be assessed.
    - Assessment Methods: Attendance, Score, Certification, and Pass/Fail.
      - If Score is selected as the assessment method, users are required to set up **at least one** post-training assessment. This assessment must take the form of either a customized or external questionnaire.

        ! Users must also ensure that **at least one** post-training assessment item undergoes evaluation. To meet this requirement, users must confirm when prompted by the respective radio button query, whether for an individual question in the customized questionnaire or for the entire external questionnaire.

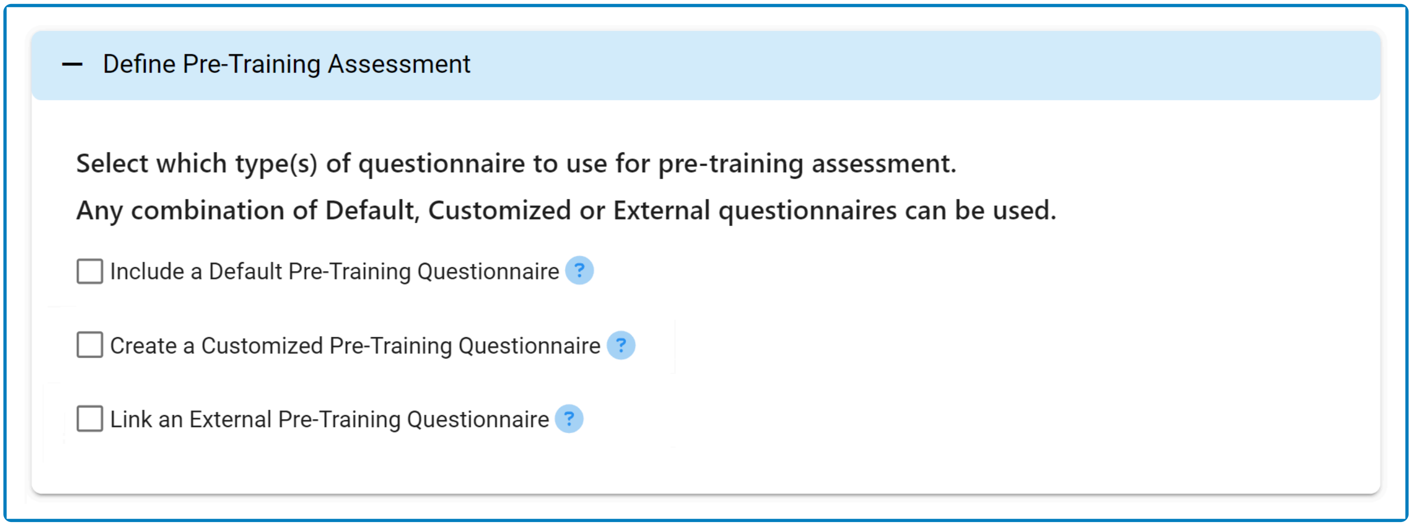
      - If Certification is selected as the assessment method, the Certification Information accordion will be visible to the trainee during the training execution.
12. ***Training Definition Reviewer:*** This is a multi-select dropdown field that retrieves the list of users, roles, and groups in the system. It is a mandatory field. It allows for the selection of the user(s), role(s), and/or group(s) responsible for reviewing the training.
    - During the Define Trainings workflow, the individual(s) selected in this dropdown will be assigned the Review Training Definition task.
13. ***Training Execution Reviewer:*** This is a multi-select dropdown field that retrieves the list of users, roles, and groups in the system. It is a mandatory field. It allows for the selection of the user(s), role(s), and/or group(s) responsible for handling extension requests and reviewing the training

execution.
    - During the Conduct Trainings workflow, the individual(s) selected in this dropdown will be assigned the New Extension Request task (if an extension is requested) and the Sign Off Training Completion task.
14. ***Include Pre-Assessment:*** This is a checkbox that allows users to add a pre-assessment to the training program.
    - If selected, it will reveal the Define Pre-Training Assessment accordion, where users can configure the pre-training assessment.
15. ***Include Documentation to Read:*** This is a checkbox that allows users to add reading material to the training program.
    - If selected, it will reveal the Define Documentation to Read accordion, where users can specify the reading materials for trainees.
16. ***Include Training Course(s) to Execute:*** This is a checkbox that allows users to add specific courses to the training program.
    - If selected, it will reveal the Define Training Course(s) to Execute accordion, where users can define the training courses to be completed.
17. ***Include Post-Assessment:*** This is a checkbox that allows users to add a post-assessment to the training program.
    - If selected, it will reveal the Define Post-Training Assessment accordion, where users can configure the post-training assessment.

> By selecting these checkboxes, users determine the phases of the training program and what trainees will be asked to review and complete.

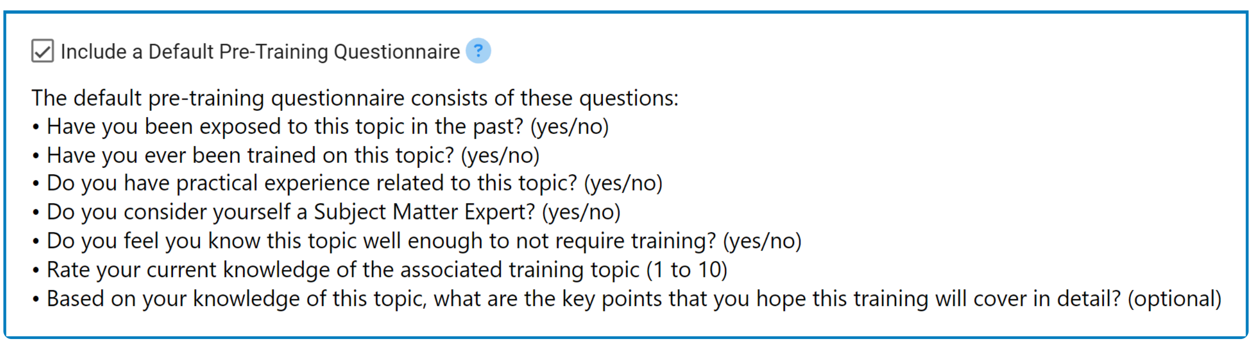
10.1.2. Define Pre-Training Assessment

In this section of the New Training form, users can configure the pre-training assessment.

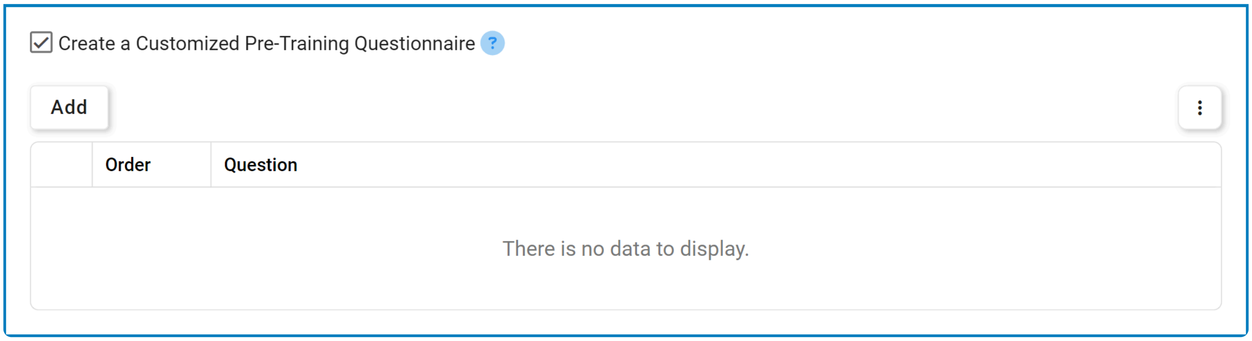


A pre-training assessment is designed to gauge the knowledge and readiness of trainees prior to instruction or training. Users can configure one or more questionnaires for this assessment by utilizing the provided checkboxes.

1. ***Include a Default Pre-Training Questionnaire:*** This is a checkbox that allows users to include a default questionnaire in the pre-assessment.
   - If selected, it will reveal a set of predefined questions.



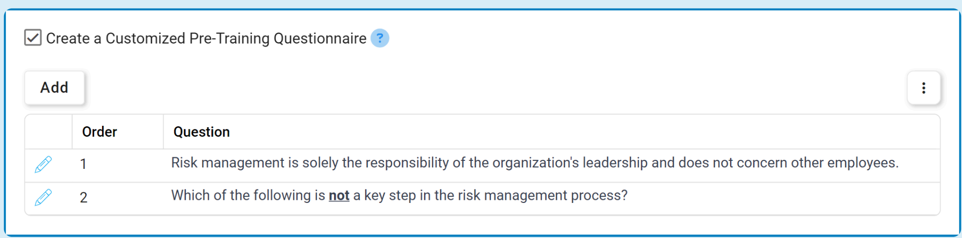
2. ***Create a Customized Pre-Training Questionnaire:*** This is a checkbox that allows users to create a tailored questionnaire (specific to the needs of the training program) and include it in the pre-assessment.
   - If selected, it will reveal the following grid:



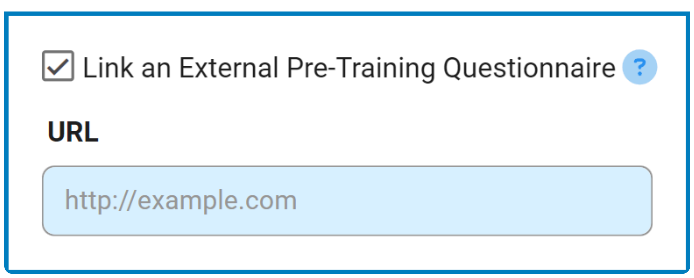
For more details on this type of grid and its features, click here.

- ***Add:*** This button allows users to add a new pre-training question.
  - If If selected, it will display the New Pre-Training Question form.

As questions are added, they populate the grid. To perform additional customization and review, users can either click on the **Edit** ( ) icon beside each question or double-click on the question itself.



3. ***Link an External Pre-Training Questionnaire:*** This is a checkbox that allows users to link and include an external questionnaire in the pre-assessment.
   - If selected, it will reveal the following field:



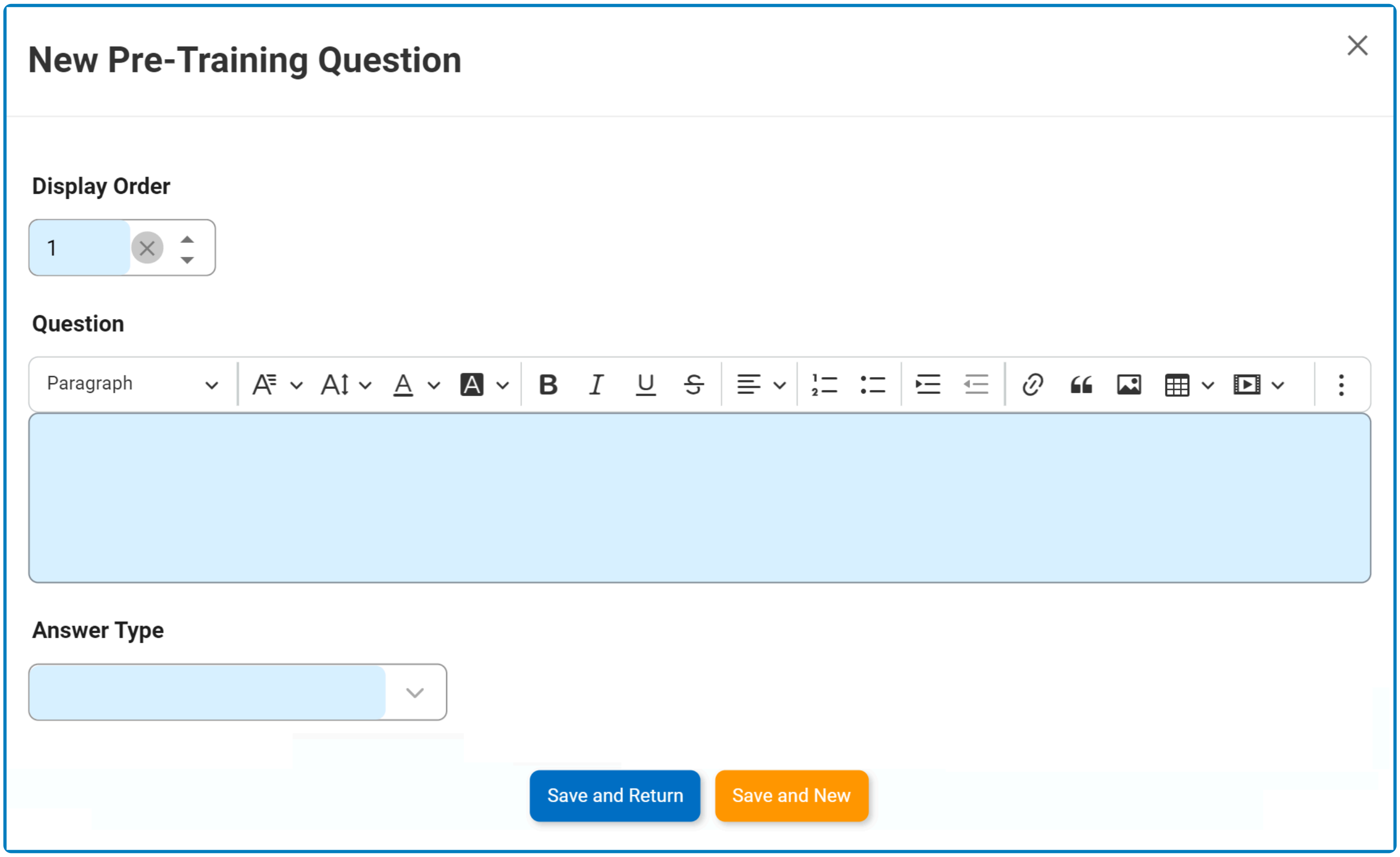
- ***URL:*** This is a text field that allows users to input the URL for the external questionnaire. It is a mandatory field.

During the training execution, trainees will access this questionnaire through the provided link.

Please note that unless a selection is made, a pre-training assessment will not be assigned to the trainees.

10.1.2.1. New Pre-Training Question

In the New Pre-Training Question form, users can create a new question for their customized pre-training questionnaire.



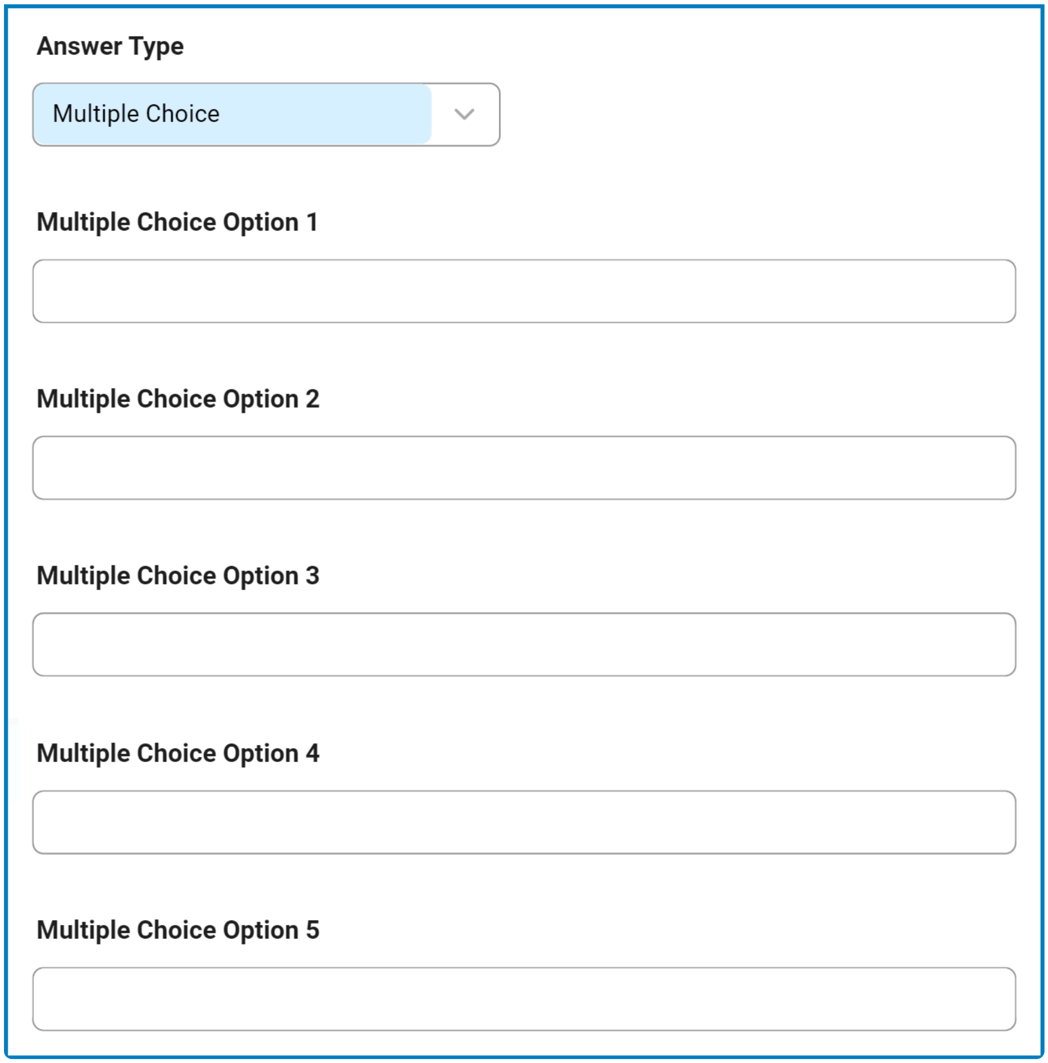
> For guidance on common form functions, please refer to the dedicated section in the manual.

1. ***Display Order:*** This is a numeric field that allows users to input the display order of the question. It is a mandatory field. It determines the sequence in which the question appears within the questionnaire.

   > Please note that the system automatically assigns a unique number to each question based on its order in the questionnaire. Users, however, can modify this number as needed.

2. ***Question:*** This is a rich text field that allows users to input the question or statement to be presented in the questionnaire. It is a mandatory field.
3. ***Answer Type:*** This is a single-select dropdown field that displays the list of answer types. It is a mandatory field. It allows users to select the appropriate answer format for the question.

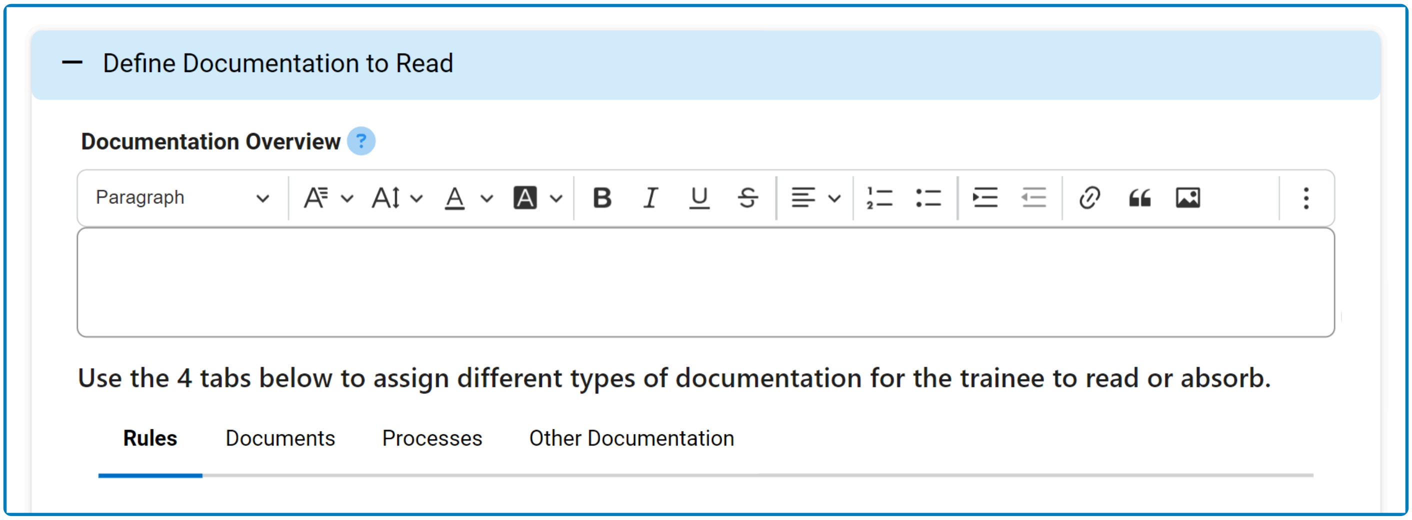
- Answer Types: True/False, Multiple Choice, Text Value, Yes/No, and Pass/Fail.
  - If Multiple Choice is selected, it will reveal the following fields:



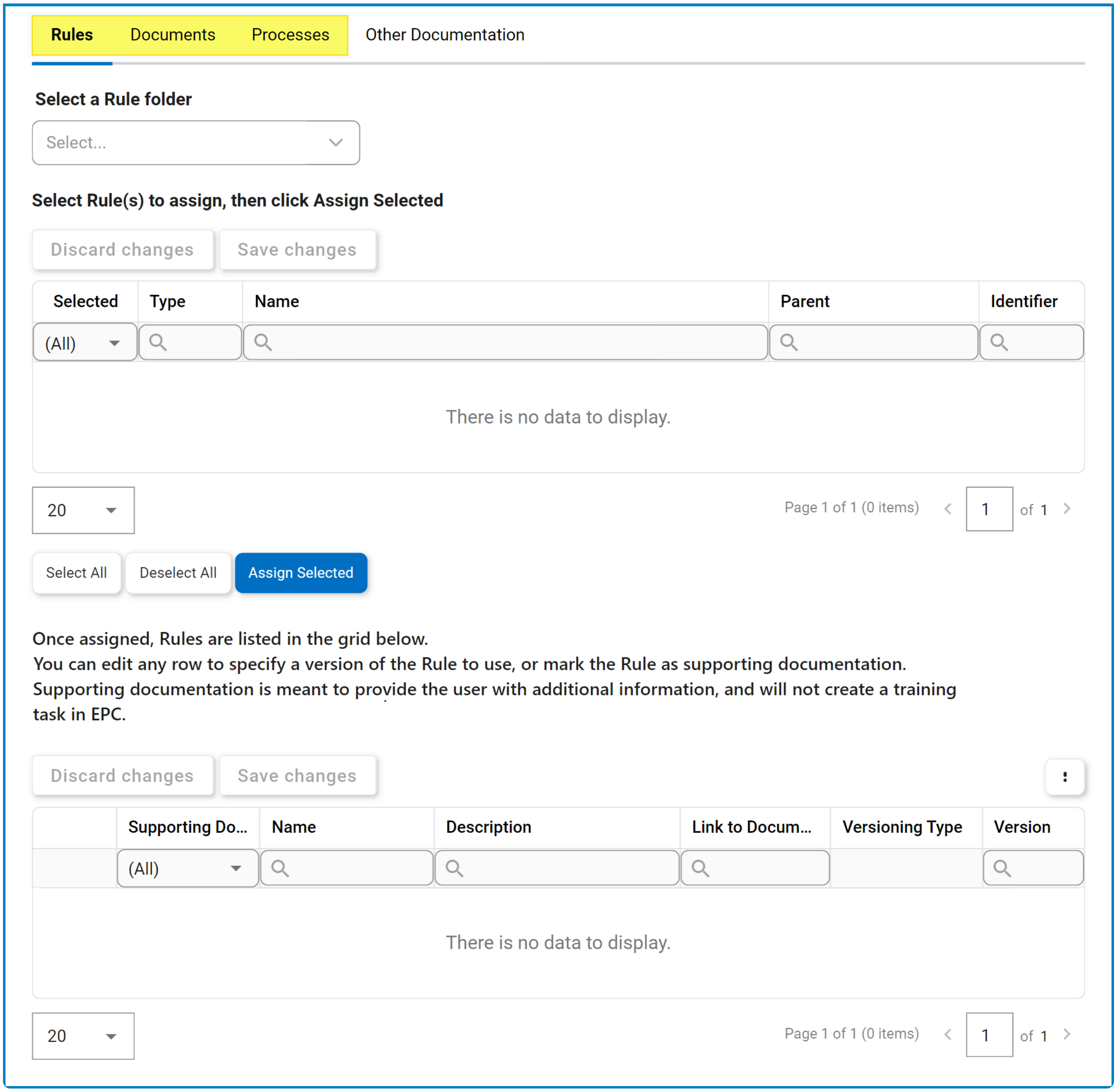
4. ***Save and Return:*** This button allows users to save the question and return to the New Training form.
5. ***Save and New:*** This button allows users to save the question and open a new form to create another question.

10.1.3. Define Documentation to Read

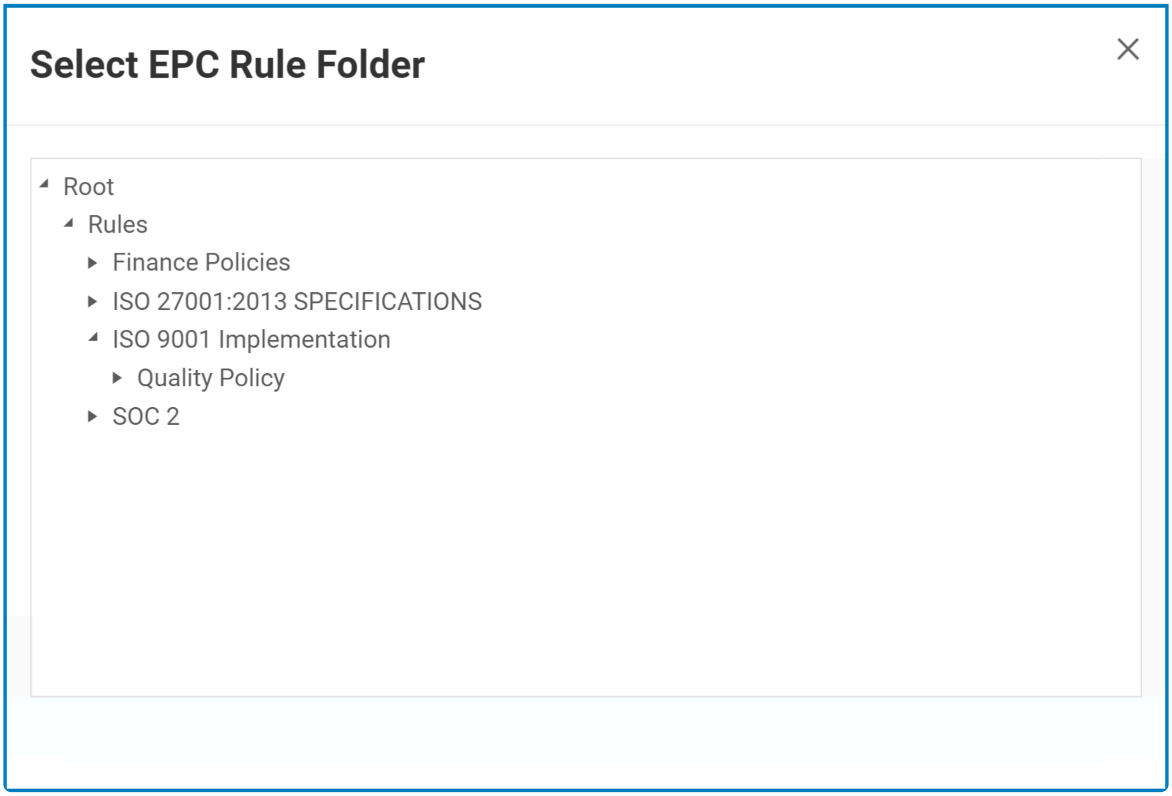
In this section of the New Training form, users can define the documentation to be assigned as reading material for trainees.



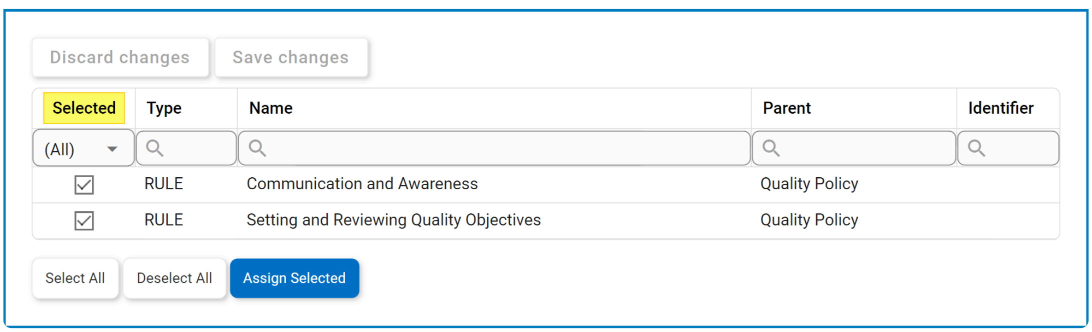
1. ***Documentation Overview:*** This is a rich text field that allows users to provide a summary of the documentation, including any necessary instructions or credentials required to access the material.
2. ***Tabs:*** Users can utilize the tabs in this section to assign different types of documentation to the training.
    a. **EPC Objects:** Users have the option to assign EPC objects (rules, documents, or processes) as documentation.



- ***Select a Rule/Document/Process Folder:*** This is a single-select field that displays the list of EPC object folders. Rather than in a dropdown menu, however, this list is displayed in a pop-up window.

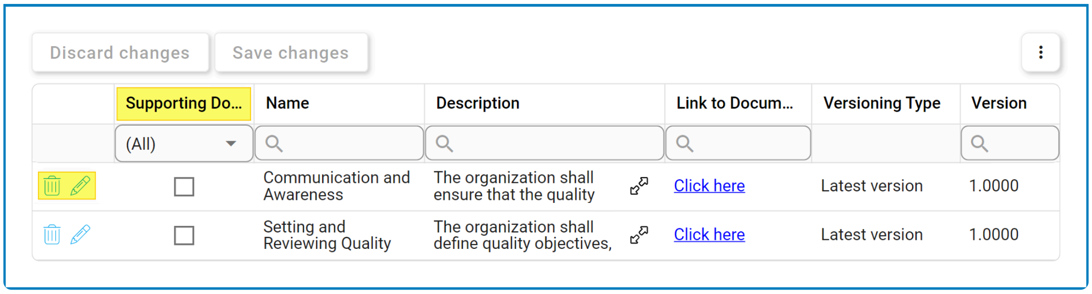


- Once a parent EPC object folder is chosen, its child objects will populate the below grid.



> ! In this grid, users can mark individual objects for assignment by checking the corresponding **Selected** checkbox. Selections can be saved by clicking the **Save Changes** button or simply by clicking outside the grid. To discard selections, click on the **Discard Changes** button

- ***Select All:*** This button allows users to select all child objects in the grid for assignment.
- ***Deselect All:*** This button allows users to deselect all child objects in the grid.
- ***Assign Selected:*** This button allows users to assign the selected child objects in the grid.
  - Once assigned, these nodes will automatically populate the Assigned [Objects] grid.



- To set an object as supporting documentation, select the corresponding **Supporting Documentation** checkbox.

  > Please note that when an EPC object is marked as supporting documentation, it will not generate a training task in EPC; its purpose is to supplement the primary content.

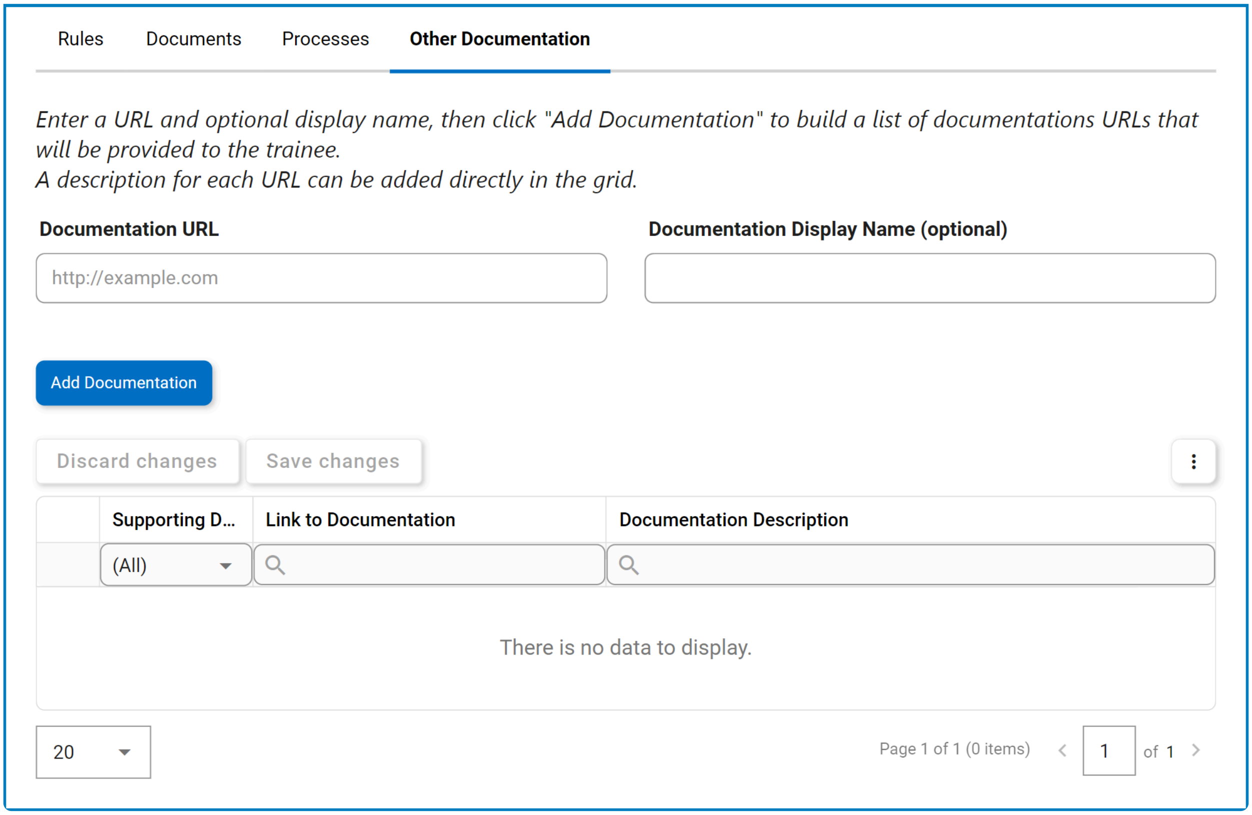
- To delete an assigned object, select the corresponding **Delete** ( ) icon.

  > To confirm the deletion of items in the grid, click on the **Save Changes** button or simply click outside the grid. To undo deletion, click on either the **Discard Changes** button or the **Undo** ( ) icon.

- To modify the version of an assigned object, select the corresponding **Edit** ( ) icon. Users can also simply double-click on the object.
  - This will display the [Edit Version of EPC [Object]] form.

    > Once an EPC object has been selected and assigned, any users, departments, and/or roles linked to it will populate the corresponding dropdowns in the Select Trainees section of the form.

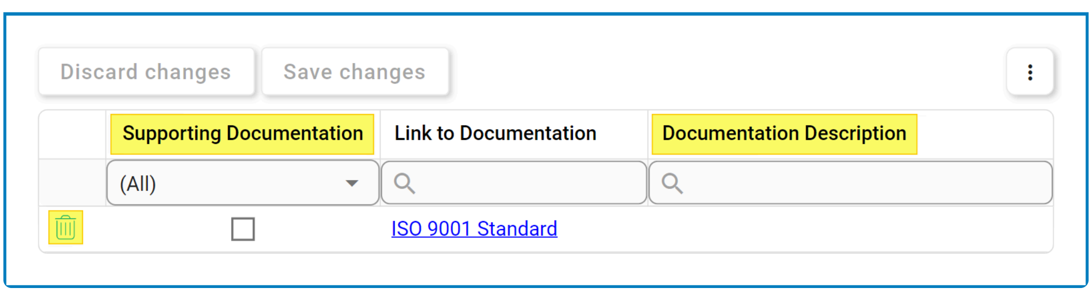
b. **Other Documentation:** Users can also include links to external documentation.



- ***Documentation URL:*** This is a text field that allows users to input the URL for the external documentation.
    - The expected format for the URL is ‘http://example.com’.
- ***Documentation Display Name (Optional):*** This is a text field that allows users to specify a display name for the URL.

> ! If no display name is provided, the URL will be listed as is.

- ***Add Documentation:*** This button allows users to add the linked documentation.
    - As links are added, they populate the grid.



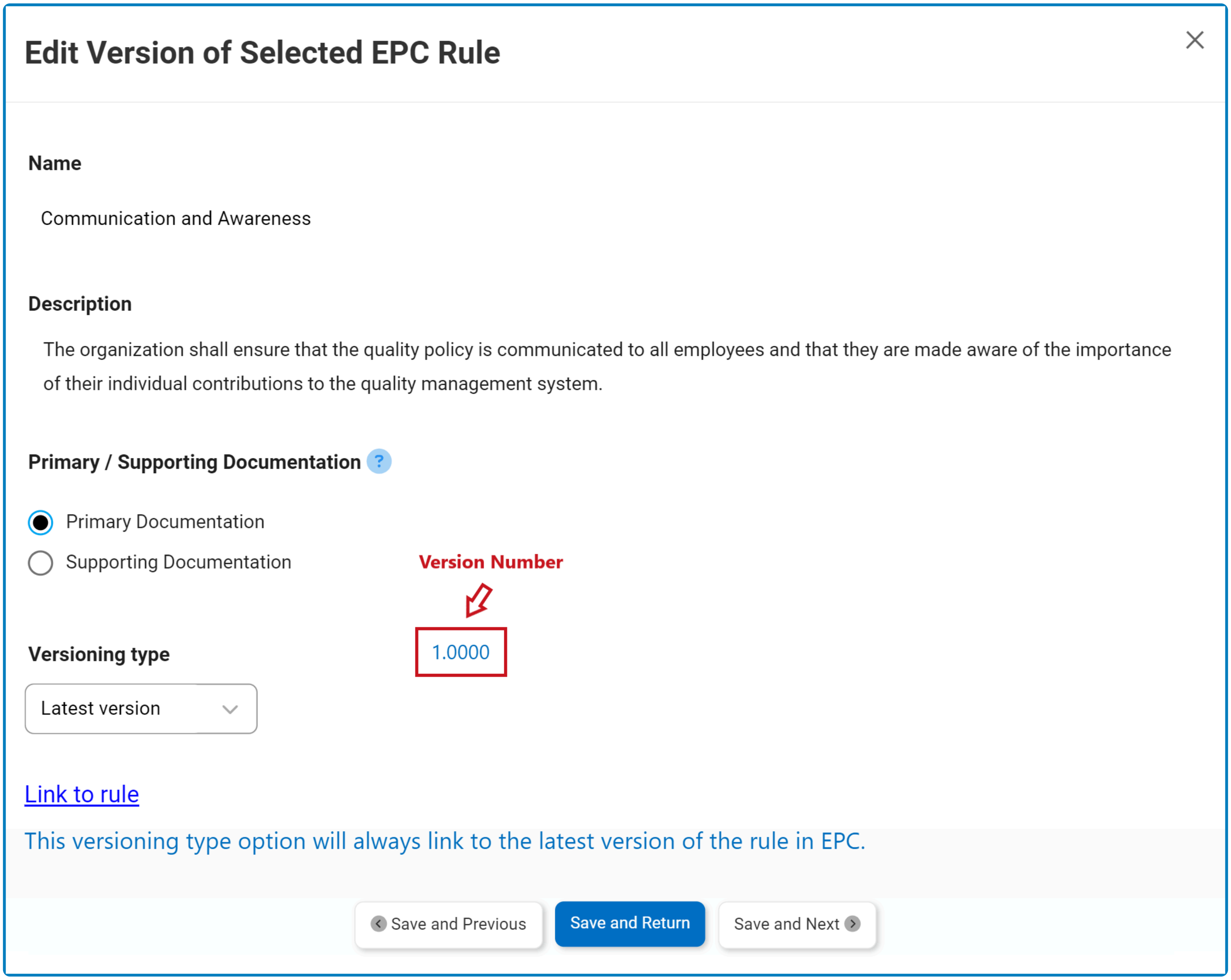
- To set a link as supporting documentation, select the corresponding **Supporting Documentation** checkbox.
- To delete a link, select the corresponding **Delete** ( ) icon.

> To confirm the deletion of items in the grid, click on the **Save Changes** button or simply click outside the grid. To undo deletion, click on either the **Discard Changes** button or the **Undo** ( ) icon.

- To provide a description for a link, simply edit inside the corresponding **Documentation Description** column.

10.1.3.1. Edit Version of EPC [Object]

In the Edit Version of EPC [Object] form, users can specify the version of the EPC object that will be assigned to the training. Users can also categorize this object as either primary or supporting documentation.

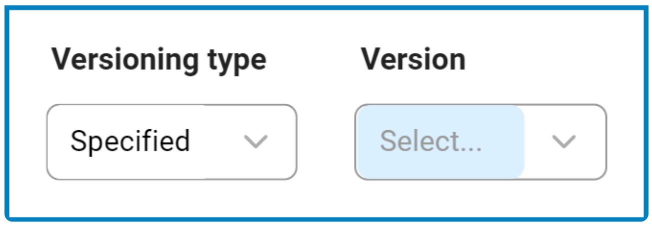


✻ For more details on the single-select dropdown fields populating this form, click here. For more details on field behavior, click here.

1. ***Name/Description:*** These fields are both automatically populated with the relevant information from EPC.
2. ***Primary/Supporting Documentation:*** This is a radio button that allows users to select only one option from a set of mutually exclusive options. Users can distinguish the EPC object as either the target of the training or the supporting material for the training.

> Please note that when an EPC object is marked as supporting documentation, it will not generate a training task in EPC; its purpose is to supplement the primary content.

3. ***Versioning Type:*** This is a single-select dropdown field that retrieves the list of versioning types from EPC.
    - Users can choose whether they want the training to display the latest published version, the current version until next published, the latest version, or a specified version of the rule.
        - If applicable, the current version until next published will link to all relevant versions of the object—from the one currently in progress to the one next published.
        - If specified version is selected from the dropdown, the following field will appear:



- ***Version:*** This is a single select dropdown field that retrieves the list of versions associated with the object from EPC. It is a mandatory field.

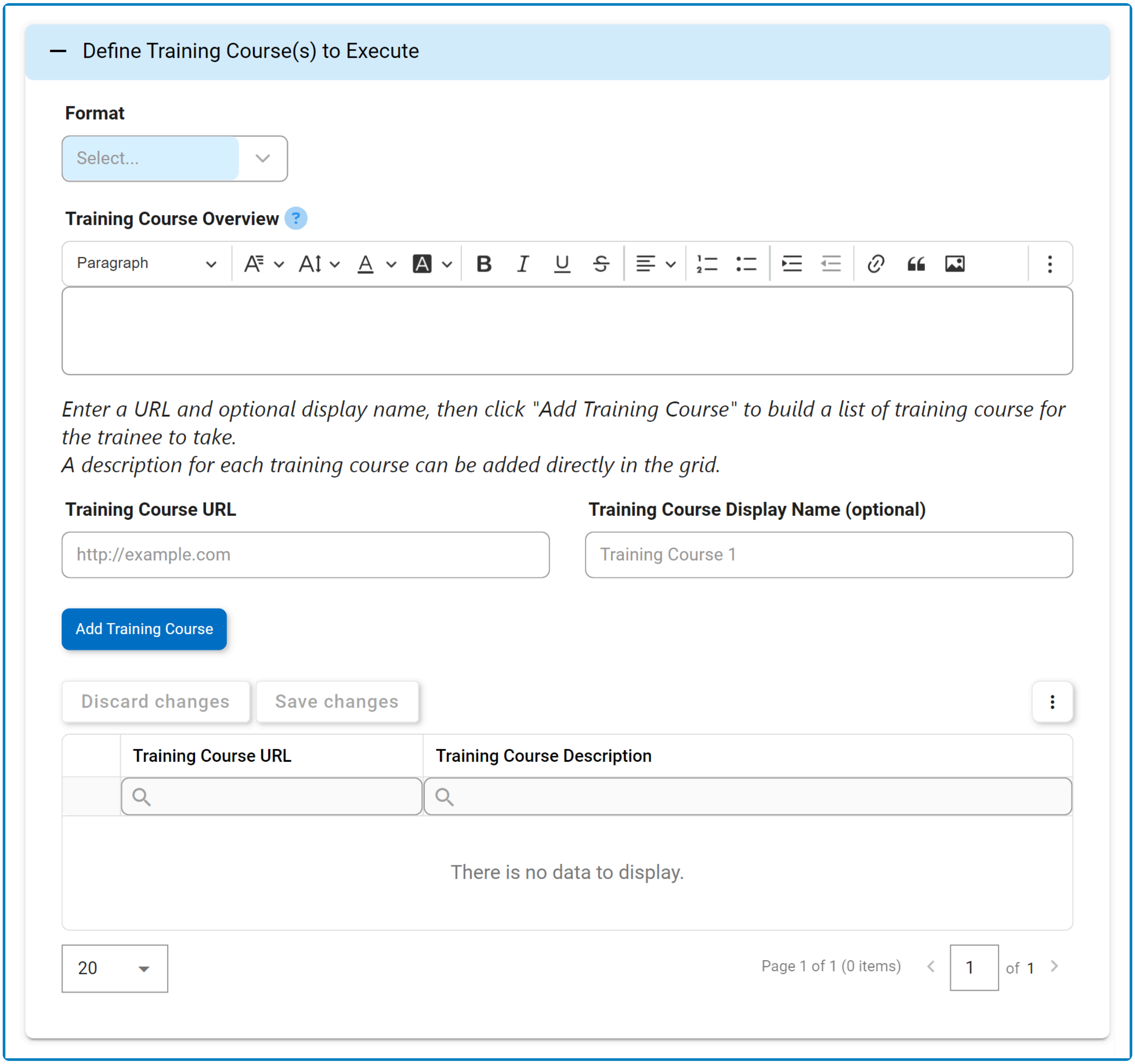
> If a versioning type is not selected from the dropdown, the training will automatically be related to the latest published version of the EPC object.

4. ***Link to Rule:*** This is a hyperlink that directs users to the object in EPC.
5. ***Save and Previous:*** This button allows users to save their changes and navigate to the previous object in the grid.
6. ***Save and Return:*** This button allows users to save their changes and return to the New Training form.
7. ***Save and Next:*** This button allows users to save their changes and navigate to the next object in the grid.

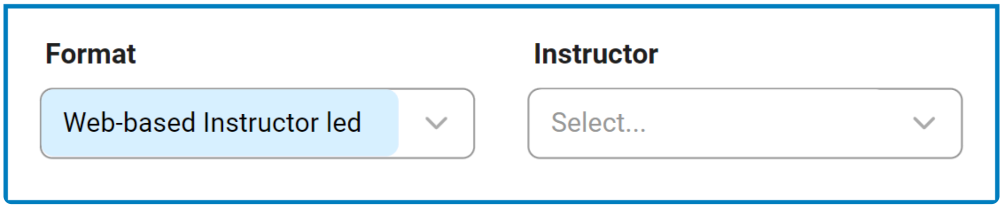
> The message at the bottom of this form will change depending on the versioning type selected.

10.1.4. Define Training Course(s) to Execute

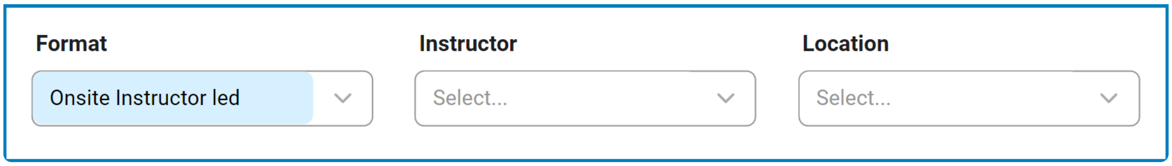
In this section of the New Training form, users can define courses for trainees to complete.



1. ***Format:*** This is a single-select dropdown field that displays the list of training course formats. It is a mandatory field. It allows users to select the format of the training course or course series.
   - Formats: Web-Based Self-Paced, Web-Based Instructor-Led, and Onsite Instructor-Led.
     - If Web-Based Instructor-Led is selected as the training format, the following field will be shown in the form:



        - ***Instructor:*** This is a single-select dropdown field that retrieves the list of users. It allows for the selection of the training course instructor.
    - If Onsite Instructor-Led is selected as the training format, the following fields will be shown in the form:



        - ***Instructor:*** This is a single-select dropdown field that retrieves the list of users. It allows for the selection of the training course instructor.
        - ***Location:*** This is a single-select dropdown field that retrieves the list of predefined locations. It allows users to select the location where the training course will be conducted.
            - Location options are created in the Location section of **Training Settings**.

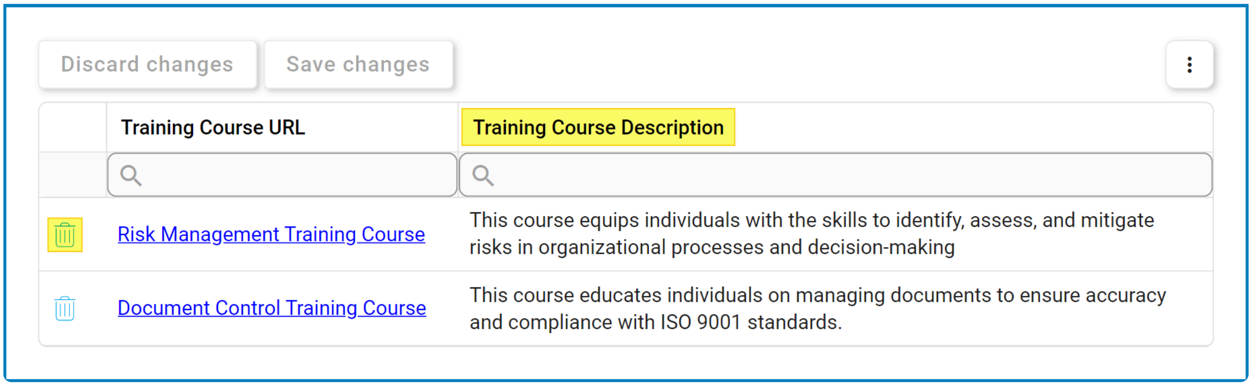
2. ***Training Course Overview:*** This is a rich text field that allows users to provide a summary of the training course or course series, including any necessary instructions or credentials required to access the content.
3. ***Training Course URL:*** This is a text field that allows users to input the URL for the training course.

> The expected format for the URL is 'http://example.com'.

4. ***Training Course Display Name (Optional):*** This is a text field that allows users to specify a display name for the URL.

> ! If no display name is provided, the URL will be listed as is.

5. ***Add Training Course:*** This button allows users to add the linked training course.
    - As links are added, they populate the grid.



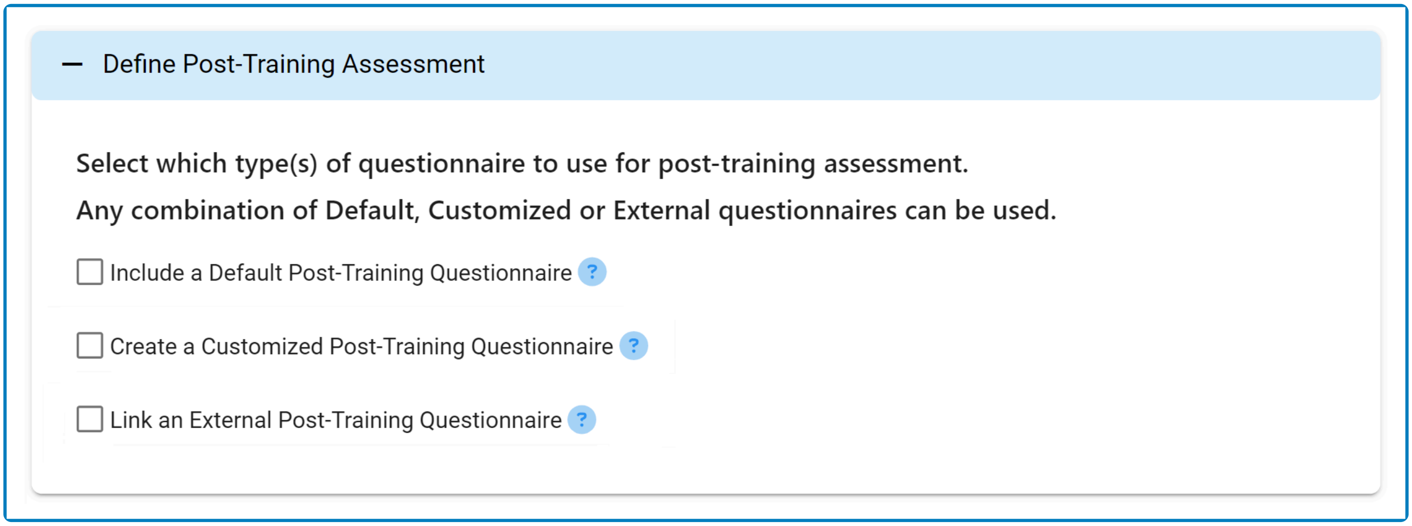
- To delete a link, select the corresponding **Delete** ( ) icon.

> To confirm the deletion of items in the grid, click on the **Save Changes** button or simply click outside the grid. To undo deletion, click on either the **Discard Changes** button or the **Undo** ( ) icon.

- To provide a description for a link, simply edit inside the corresponding **Training Course Description** column.

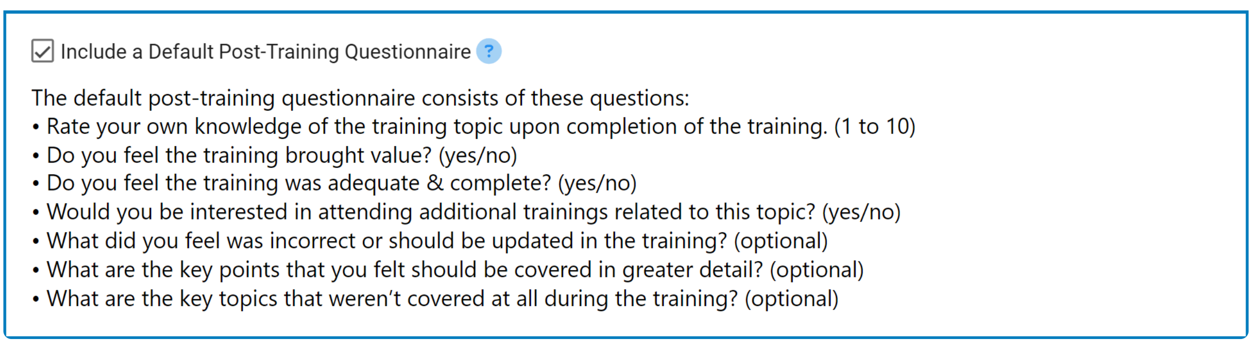
10.1.5. Define Post-Training Assessment

In this section of the New Training form, users can configure the post-training assessment.

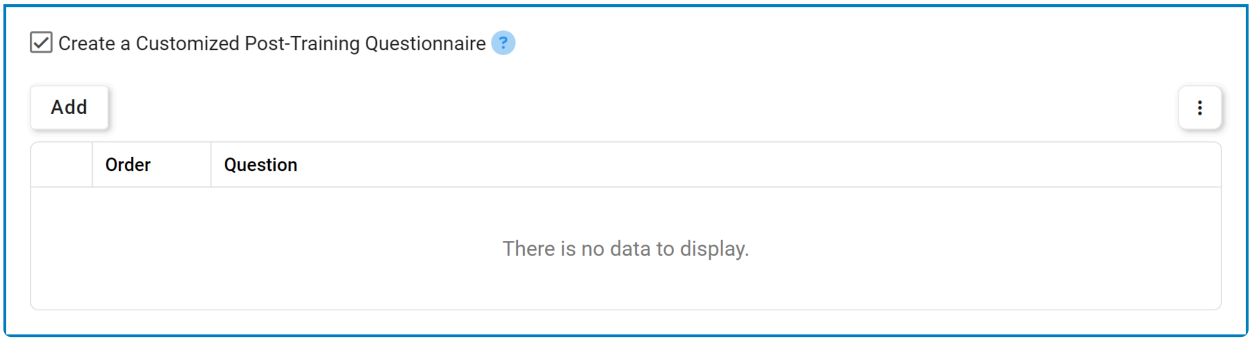


✱ A post-training is designed to evaluate trainees' comprehension and retention of the training material after its completion. Users can configure one or more questionnaires for this assessment by utilizing the provided checkboxes.

1. ***Include a Default Post-Training Questionnaire:*** This is a checkbox that allows users to include a default questionnaire in the post-assessment.
    - If selected, it will reveal a set of predefined questions.



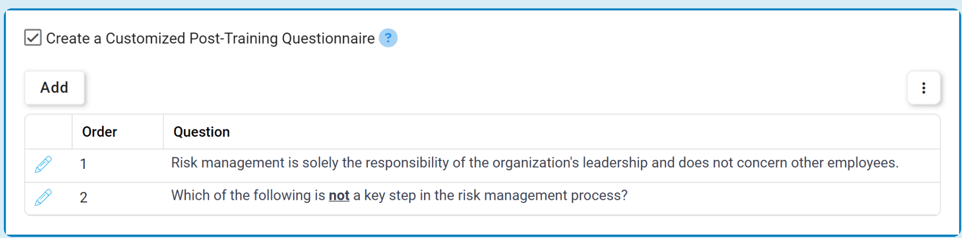
2. ***Create a Customized Post-Training Questionnaire:*** This is a checkbox that allows users to create a tailored questionnaire (specific to the needs of the training program) and include it in the post-assessment.
    - If selected, it will reveal the following grid:



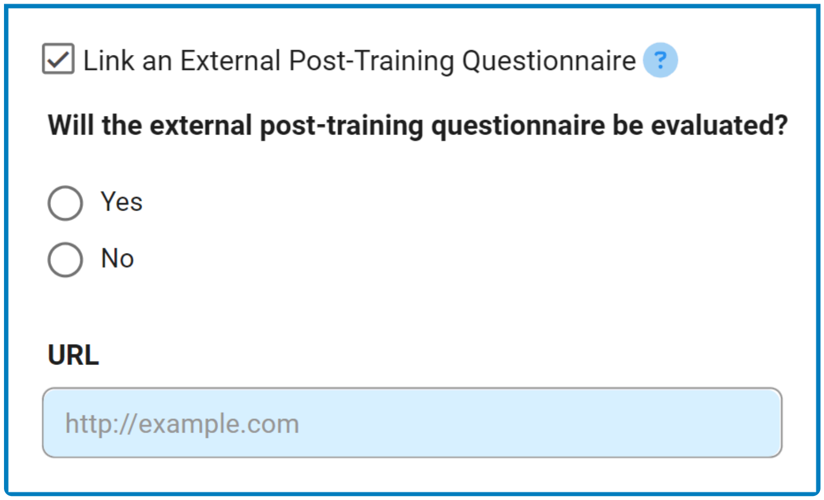
For more details on this type of grid and its features, click here.

- ***Add:*** This button allows users to add a new pre-training question.
  - If selected, it display the New Post-Training Question form.

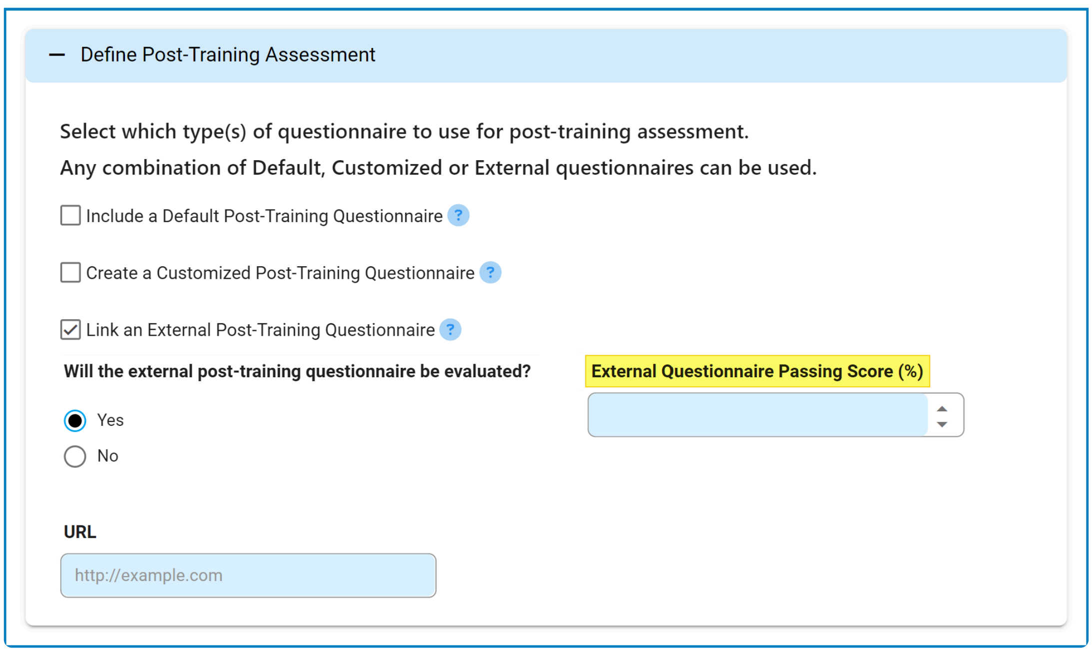
As questions are added, they populate the grid. To perform additional customization and review, users can either click on the **Edit** ( ) icon beside each question or double-click on the question itself.



3. ***Link an External Post-Training Questionnaire:*** This is a checkbox that allows users to link and include an external questionnaire in the post-assessment.
   - If selected, it will reveal the following fields:



- ***Will the external post-training questionnaire be evaluated?:*** This is a radio button that allows users to select only one option from a set of mutually exclusive options. Users can choose whether the questionnaire will be evaluated—that is, whether it will contribute to the assessment's overall score.
  - If Yes is selected, the **External Questionnaire Passing Score (%)** field becomes visible and mandatory, requiring a range between 1 and 100.



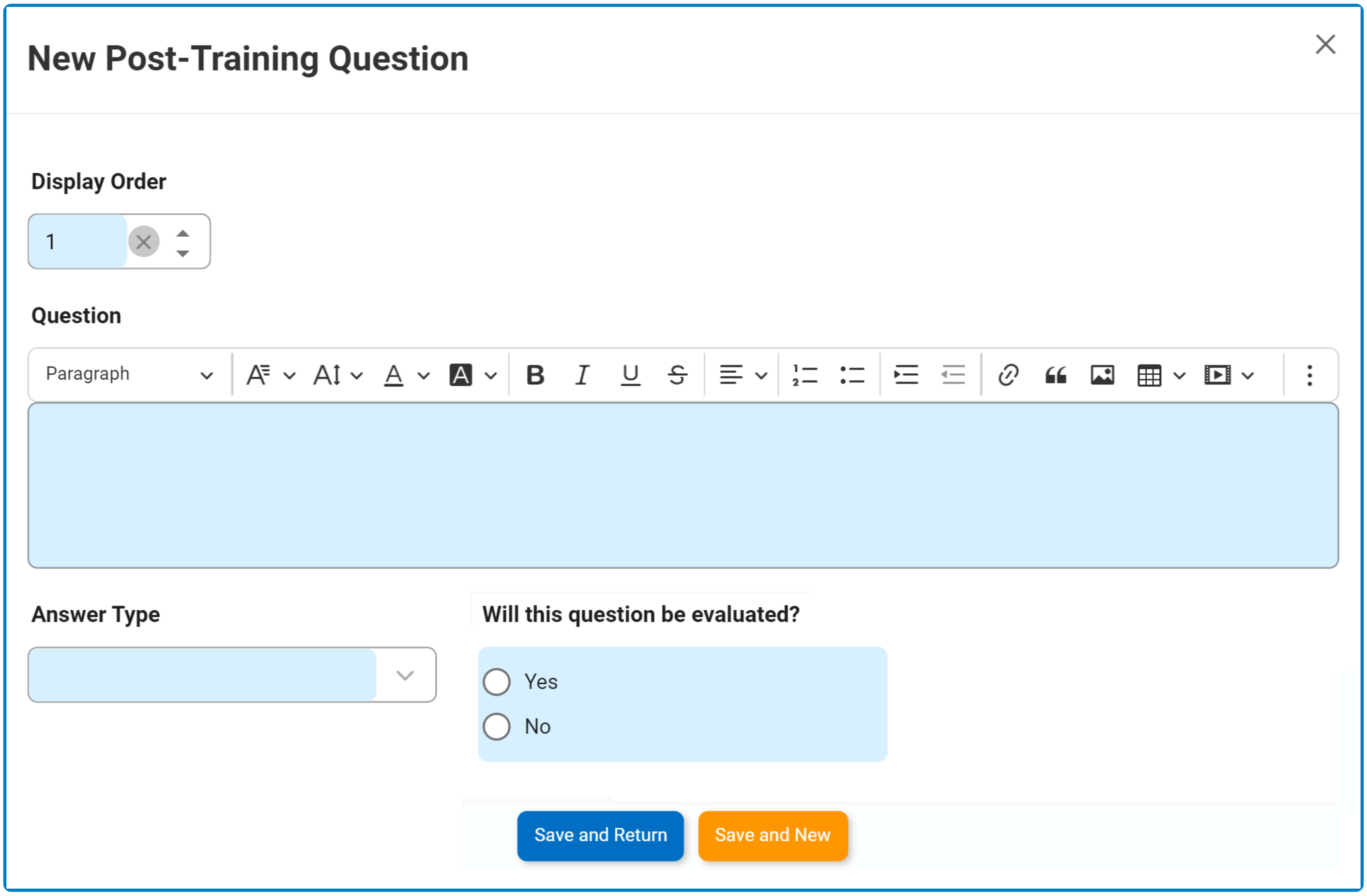
  - If No is selected, the **External Questionnaire Passing Score (%)** field remains hidden.
- ***URL:*** This is a text field that allows users to input the URL for the external questionnaire. It is a mandatory field.

> During the training execution, trainees will access this questionnaire through the provided link.

! Please note that unless a selection is made, a post-training assessment will not be assigned to the trainees.

10.1.5.1. New Post-Training Question

In the New Post-Training Question form, users can create a new question for their customized post-training questionnaire.



For guidance on common form functions, please refer to the dedicated section in the manual.

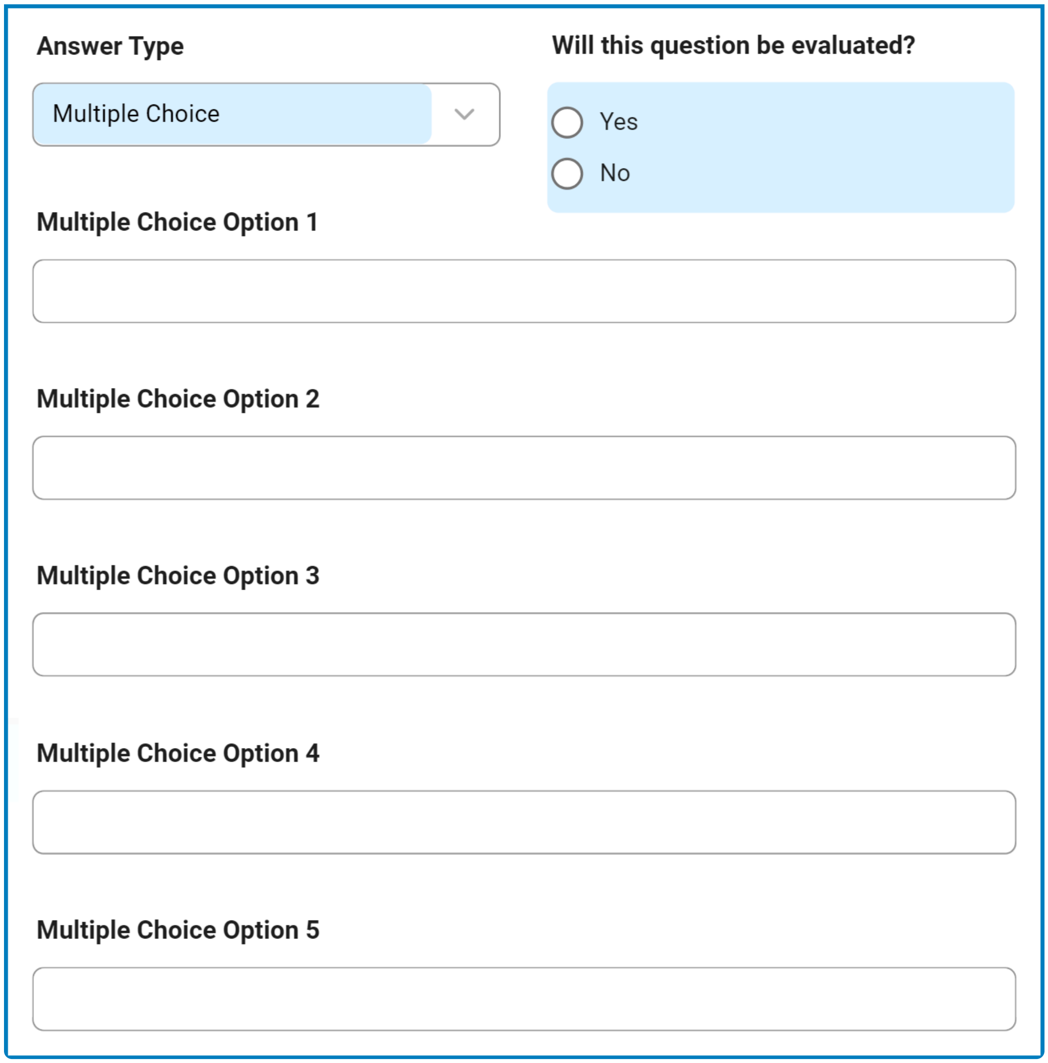
1. ***Display Order:*** This is a numeric field that allows users to input the display order of the question. It is a mandatory field. It determines the sequence in which the question appears within the questionnaire.

   Please note that the system automatically assigns a unique number to each question based on its order in the questionnaire. Users, however, can modify this number as needed.

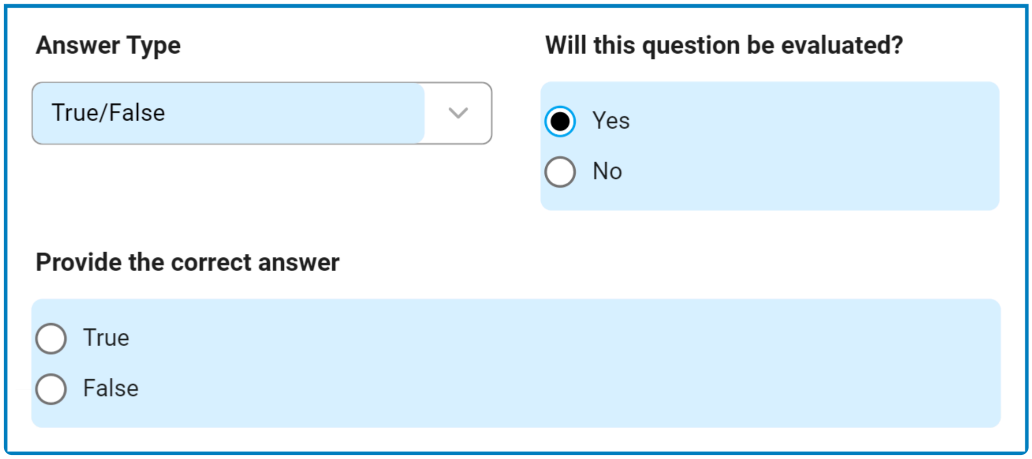
2. ***Question:*** This is a rich text field that allows users to input the question or statement to be presented in the questionnaire. It is a mandatory field.
3. ***Answer Type:*** This is a single-select dropdown field that displays the list of answer types. It is a

mandatory field. It allows users to select the appropriate answer format for the question.

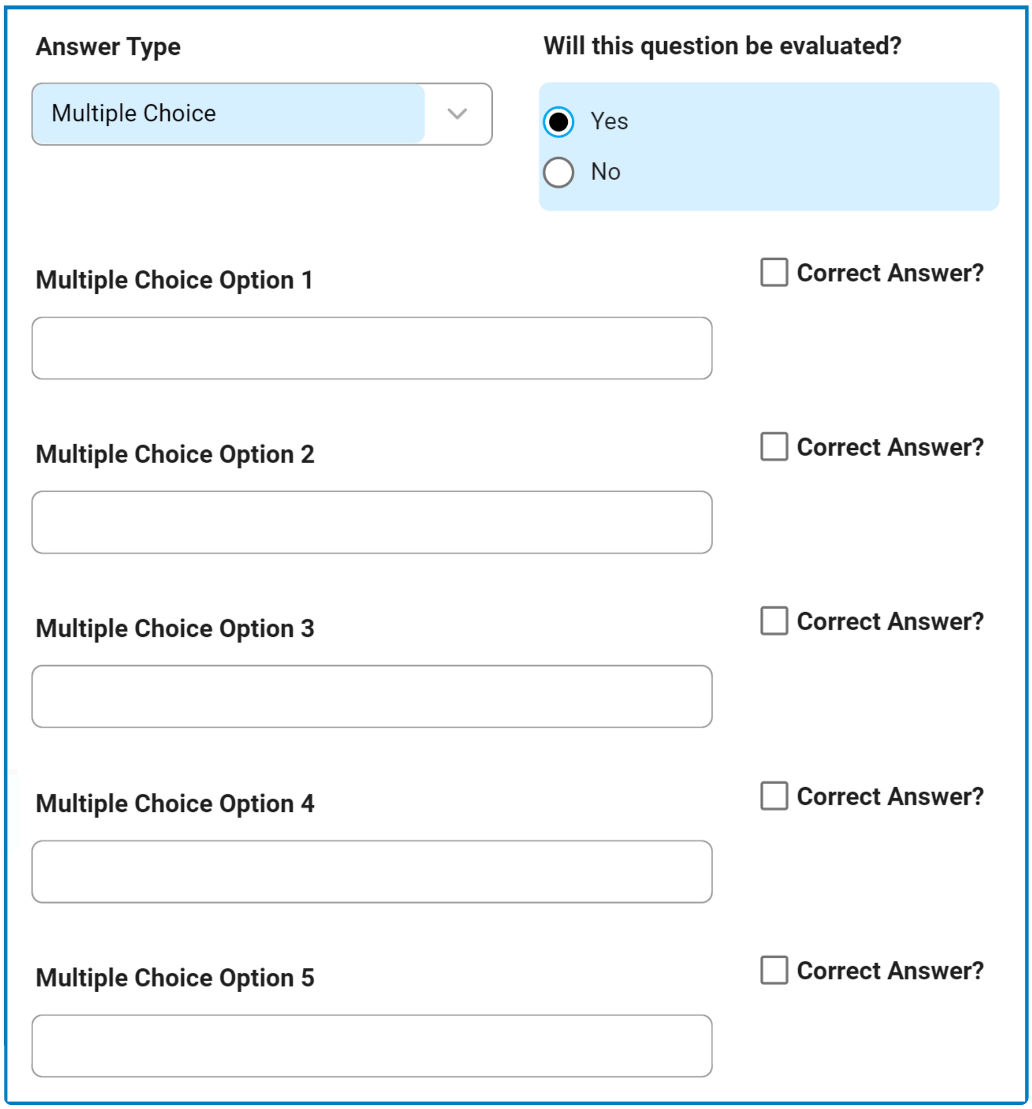
- Answer Types: True/False, Multiple Choice, Text Value, Yes/No, and Pass/Fail.
    - If Multiple Choice is selected, it will reveal the following fields:



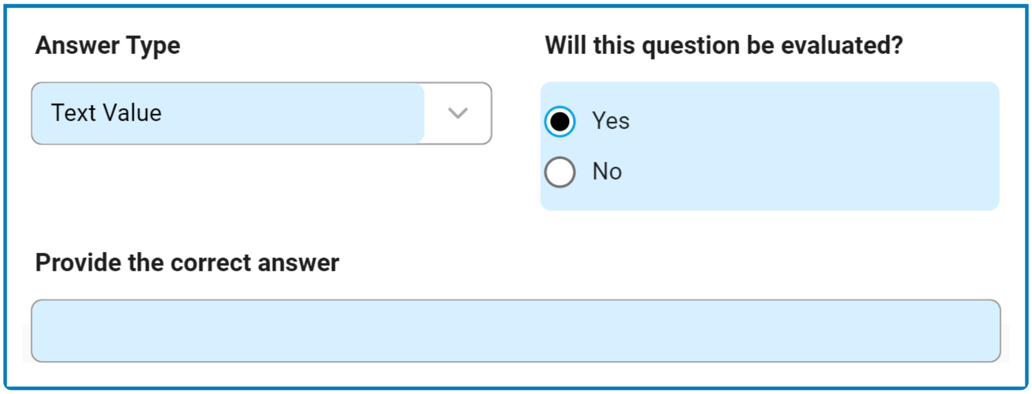
4. ***Will this question be evaluated?:*** This is a radio button that allows users to select only one option from a set of mutually exclusive options. Users can choose whether the question will be evaluated—that is, whether it will contribute to the assessment's overall score.
    - If Yes is selected, users are required to provide the correct answer for the question based on the selected answer format.
        - **Evaluation Details Based on Answer Formats**
            - For the True/False format, the following field is revealed:



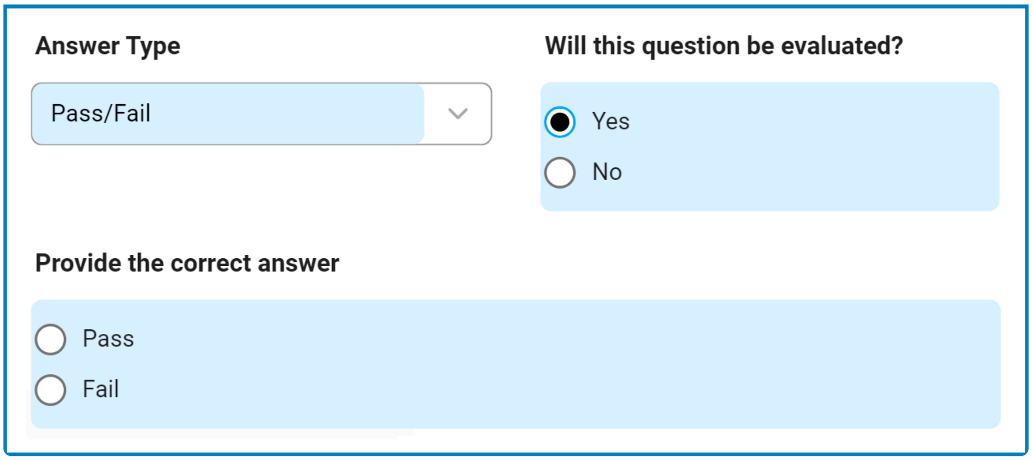
- For the Multiple Choice format, the following fields are revealed:



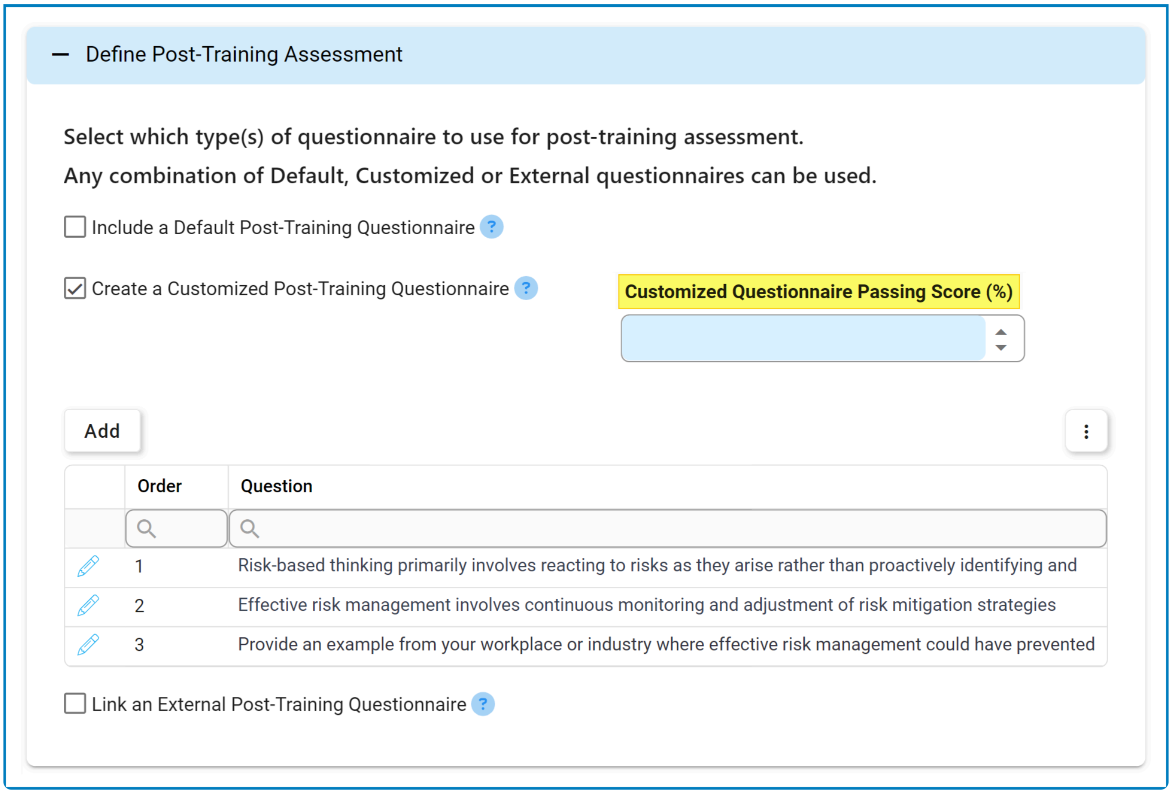
- For the Text Value format, the following field is revealed:



- For the Yes/No format, the following field is revealed: !(center)https://manula.s3.amazonaws.com/user/10696/img/tng-v111-new-training-6-2-5.png!
- For the Pass/Fail format, the following field is revealed:



- If a question is to undergo evaluation, in the Define Post-Training Assessment accordion, the **Customized Questionnaire Passing Score (%)** field becomes visible and mandatory, requiring a range between 1 and 100.

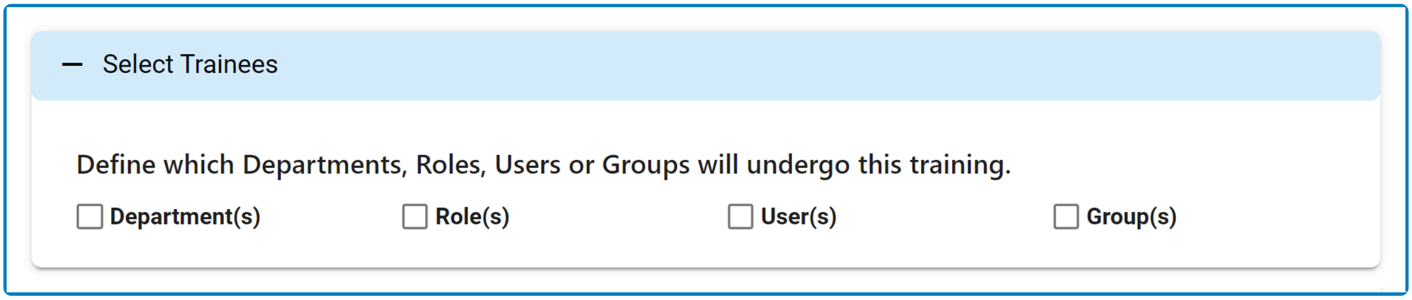


- If No is selected, the **Customized Questionnaire Passing Score (%)** field remains hidden.

5. ***Save and Return:*** This button allows users to save the question and return to the New Training form.
6. ***Save and New:*** This button allows users to save the question and open a new form to create another question.

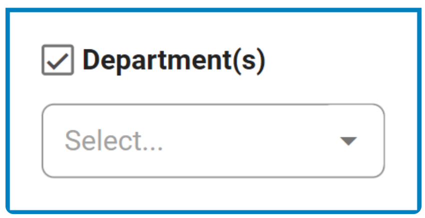
10.1.6. Select Trainees

In this section of the New Training form, users can assign the training to departments, roles, users, and/or groups.

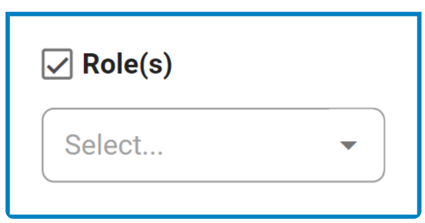


For more details on the multi-select dropdown fields populating this form, click here.

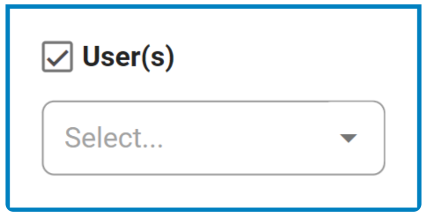
1. ***Departments:*** This is a checkbox which, if enabled, allows users to assign the training to certain departments.
    - If selected, the checkbox will display the following:



        - ***Select the Department:*** This is a multi-select dropdown field that allows users to select the department(s) to which they want the training assigned.
2. ***Roles:*** This is a checkbox which, if enabled, allows users to assign the training to certain roles.
    - If selected, the checkbox will display the following:

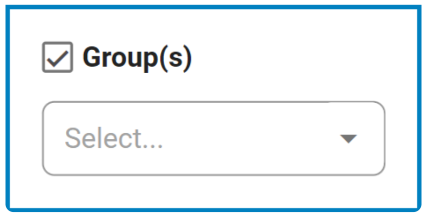


        - ***Select the Roles:*** This is a multi-select dropdown field that allows users to select the role(s) to which they want the training assigned.
3. ***Users:*** This is a checkbox field which, if enabled, allows users to assign the training to certain users.
    - If selected, the checkbox will display the following:



- ◦ ***Select the Users:*** This is a multi-select dropdown field that allows users to select the user(s) to which they want the training assigned.

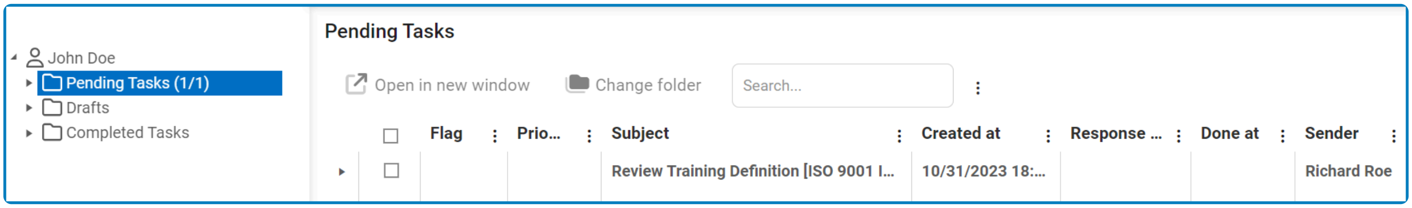
4. ***Groups:*** This is a checkbox which, if enabled, allows users to assign the training to certain groups.
    - If selected, the checkbox will display the following:



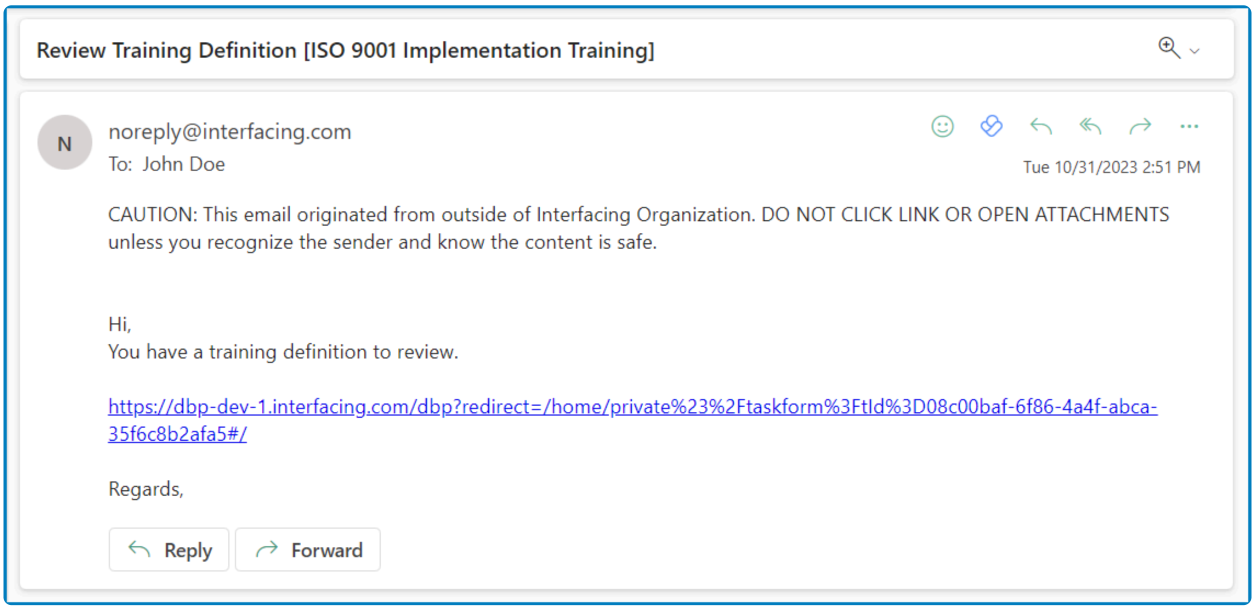
- ◦ ***Select the Groups:*** This is a multi-select dropdown field that allows users to select the group(s) to which they want the training assigned.

10.2. Review Training Definition

Once the New Training form has been submitted, the assigned user will receive a notification in their **Pending Tasks** prompting them to review the training definition.



They will also receive an email notification informing them of the assigned task.



Clicking on either the subject in **Pending Tasks** or the link in the email will direct users to the Review Training Definition form. This form displays all information entered in the New Training form; however, all fields are set to read-only. Listed below are the other notable features in the form:

1. **Comment**

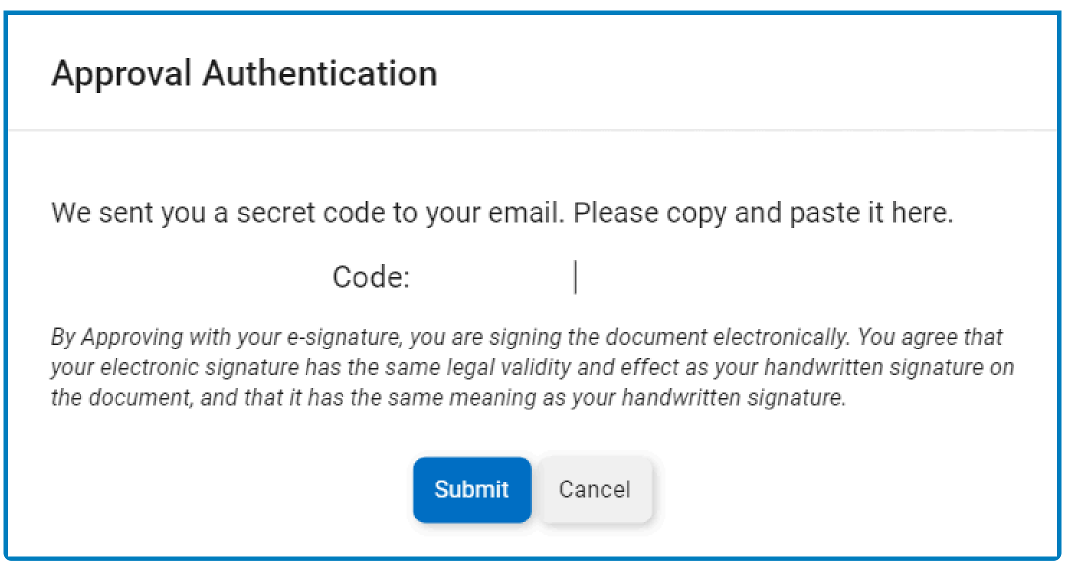
In this section of the form, users can input any relevant comments on the training.

- ***Comment:*** This field allows users to input their comments.
    - For more details on this field, click here.

2. **Reject / Approve / Save Form**

At the bottom of the New Training form, there are the following buttons:

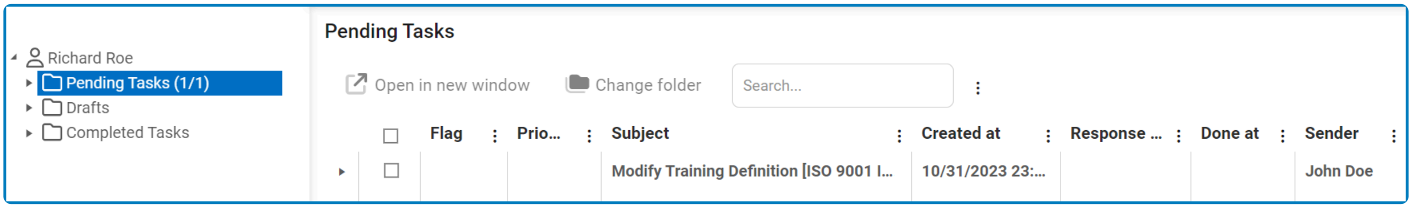
- ***Reject:*** This button allows users to reject the training definition.
    - If selected, the user responsible for creating the training definition will be tasked with modifying it.
- ***Approve:*** This button allows users to approve the training definition, bringing the workflow to an end.
    - If selected, a pop-up window will appear prompting users to authenticate their signature with a unique code.



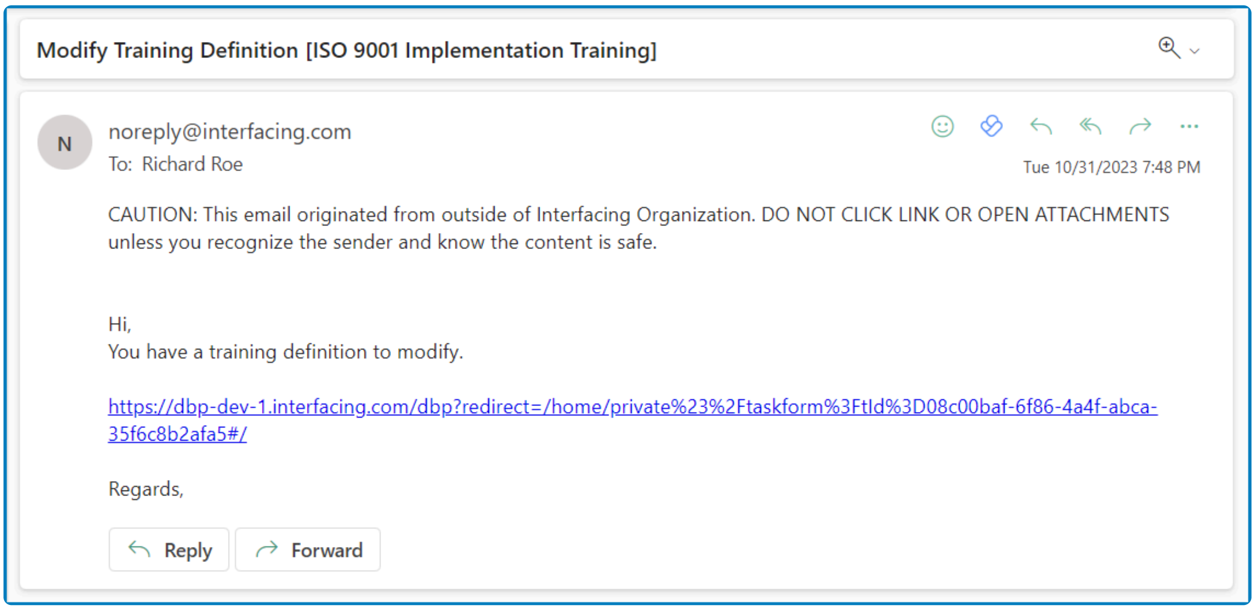
Users will receive this code via email. Once the code is entered, the event will be successfully signed off, and the task will be marked as completed. Users can then access their signature by viewing a PDF template of the form.

10.3. Modify Training Definition

If the reviewer rejects the training definition, the creator will receive a notification in their **Pending Tasks** prompting them to make modifications.



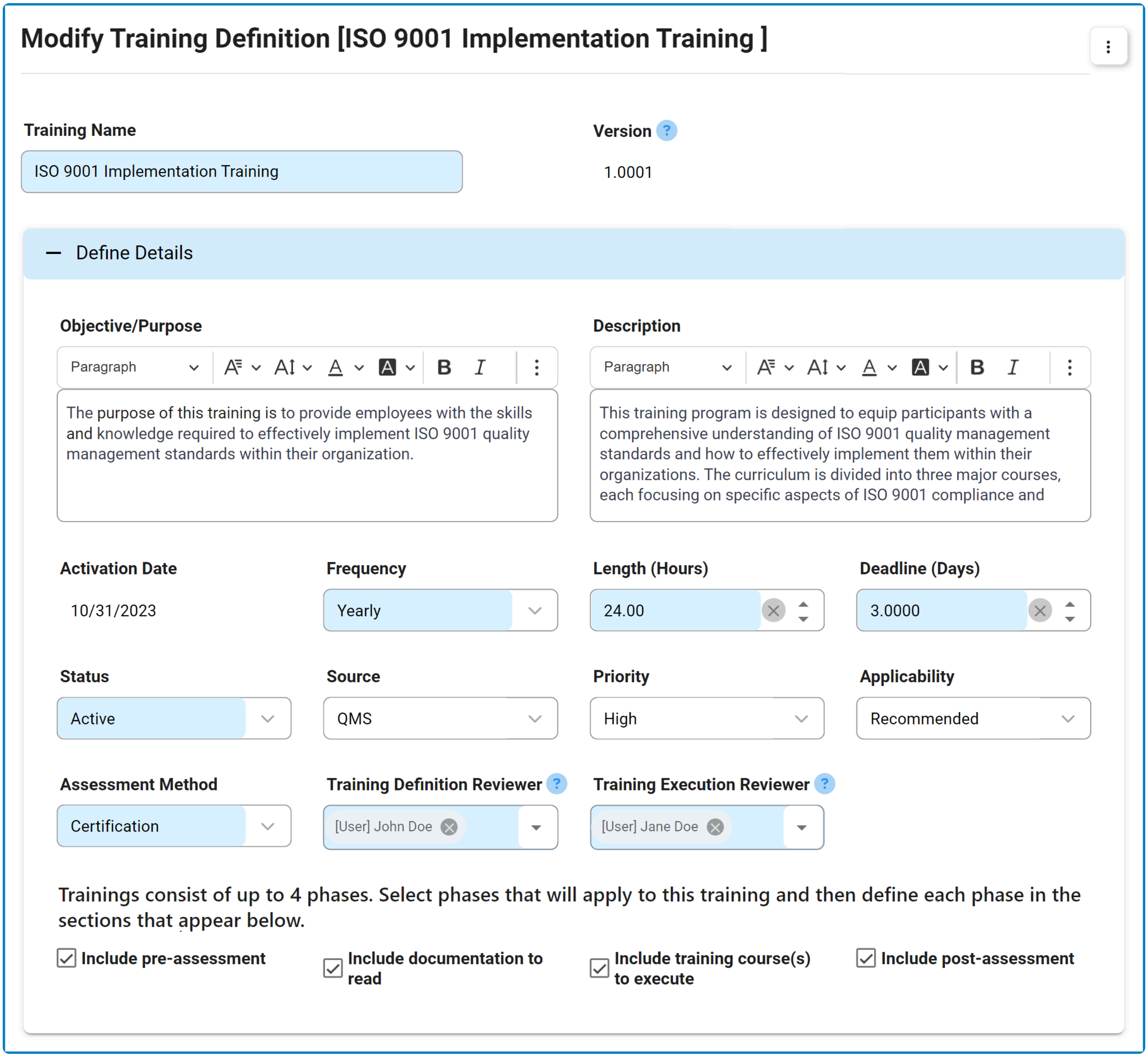
They will also receive an email notification informing them of the assigned task.



Clicking on either the subject in **Pending Tasks** or the link in the email will direct users to the Modify Training Definition form. This form is largely a duplicate of the [New Training] form, with the exception being that the fields are all populated with previously entered information. Users can modify all of these fields. This form also contains the **Comment** field from the Review Training Definition form. To avoid unnecessary repetition, only the notable aspects of the Modify Training Definition form will be listed below.

1. **Version**

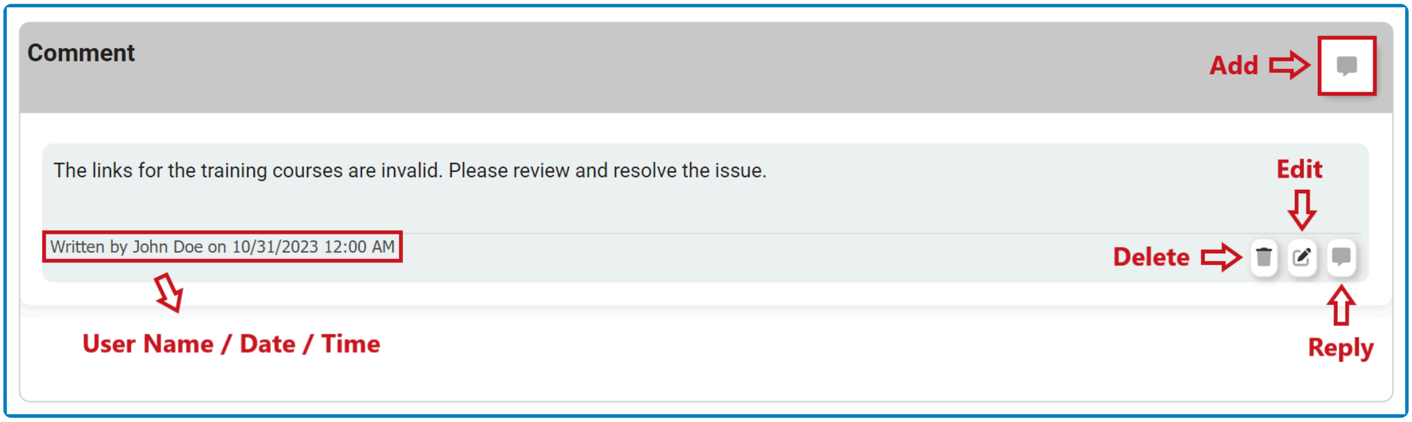
In the **Define Details** section of the form, users are provided with the version number of the training definition.



Please note that editing an unapproved training definition increments the minor version number, whereas editing an approved training definition increments the major version number.

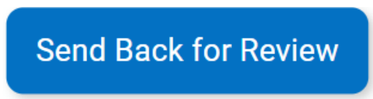
2. **Comment**

As mentioned, this form contains the **Comment** field previously described in the manual. Any comments inputted by the reviewer can be found in this field. Users can add, edit, and reply to comments.



3. **Send Back for Review**

At the bottom of the Modify Training Definition form, there is the following button:



- ***Send Back for Review:*** This button allows users to send the training definition back for review.
  - If upon review, the training definition is rejected again, this process will repeat.
  - If upon review, the training definition is approved, the Define Trainings workflow will end.

11. Training List

In this module, users can access and manage the list of trainings created within the application. These trainings can be in the approval cycle or already approved.

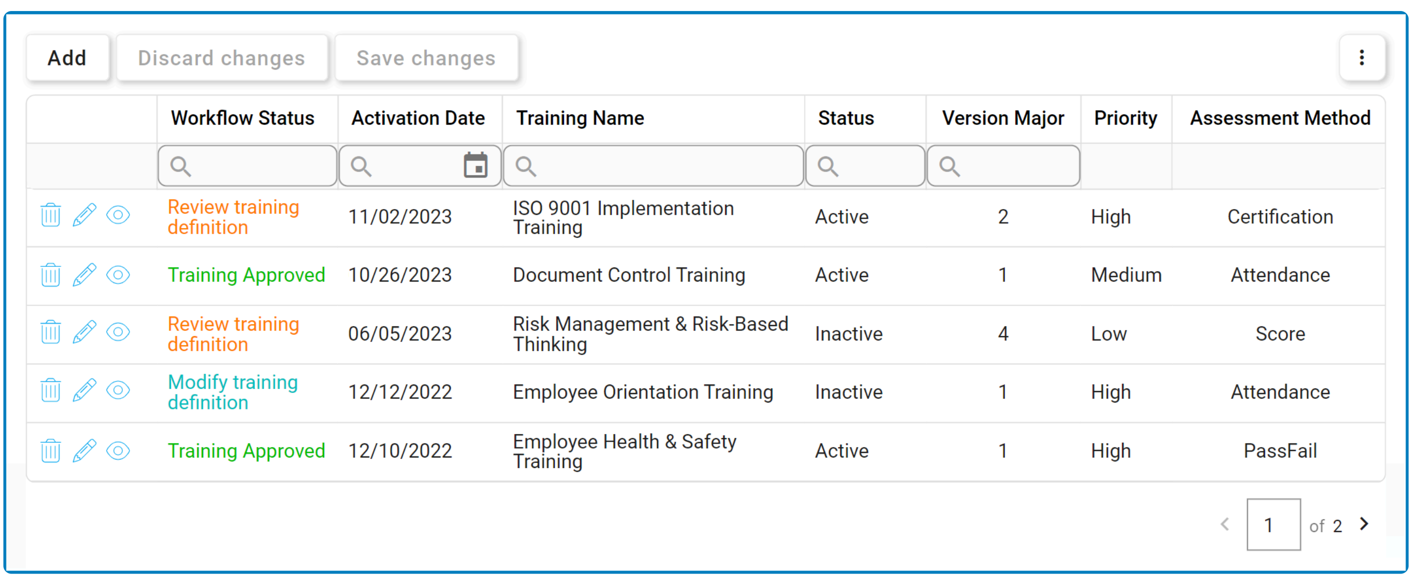
Search Panel

All fields inside the search panel act as search boxes. Any value inputted inside them will be used as search criteria to filter and retrieve data from the grid, if possible.

1. ***Activation Date:*** This is a date picker that allows users to filter by activation date.
2. ***Training Name:*** This is a text field that allows users to filter by the name of the training.
3. ***Filter:*** This button filters the results according to the entered search criteria.
4. ***Clear Filter:*** This button clears the filters that were used in the previous search and allows users to again view the full data set.

Grid

Inside the grid, trainings are organized by values derived from the Define Trainings workflow. If a training has been created in either the **Quality Event** or **CAPA** applications, it will also be indicated in this grid.


Add Discard changes Save changes

	Workflow Status	Activation Date	Training Name	Status	Version Major	Priority	Assessment Method
	Review training definition	11/02/2023	ISO 9001 Implementation Training	Active	2	High	Certification
	Training Approved	10/26/2023	Document Control Training	Active	1	Medium	Attendance
	Review training definition	06/05/2023	Risk Management & Risk-Based Thinking	Inactive	4	Low	Score
	Modify training definition	12/12/2022	Employee Orientation Training	Inactive	1	High	Attendance
	Training Approved	12/10/2022	Employee Health & Safety Training	Active	1	High	PassFail

1 of 2

> For more details on this type of grid and its features, click here.

1. ***Add:*** This button allows users to add a new training.
    - If selected, it will display the New Training form.
2. ***Delete ( ):*** This button allows users to delete a training.

    > To confirm the deletion of items in the grid, click on the **Save Changes** button or simply click outside the grid. To undo deletion, click on either the **Discard Changes** button or the **Undo** ( ) icon.

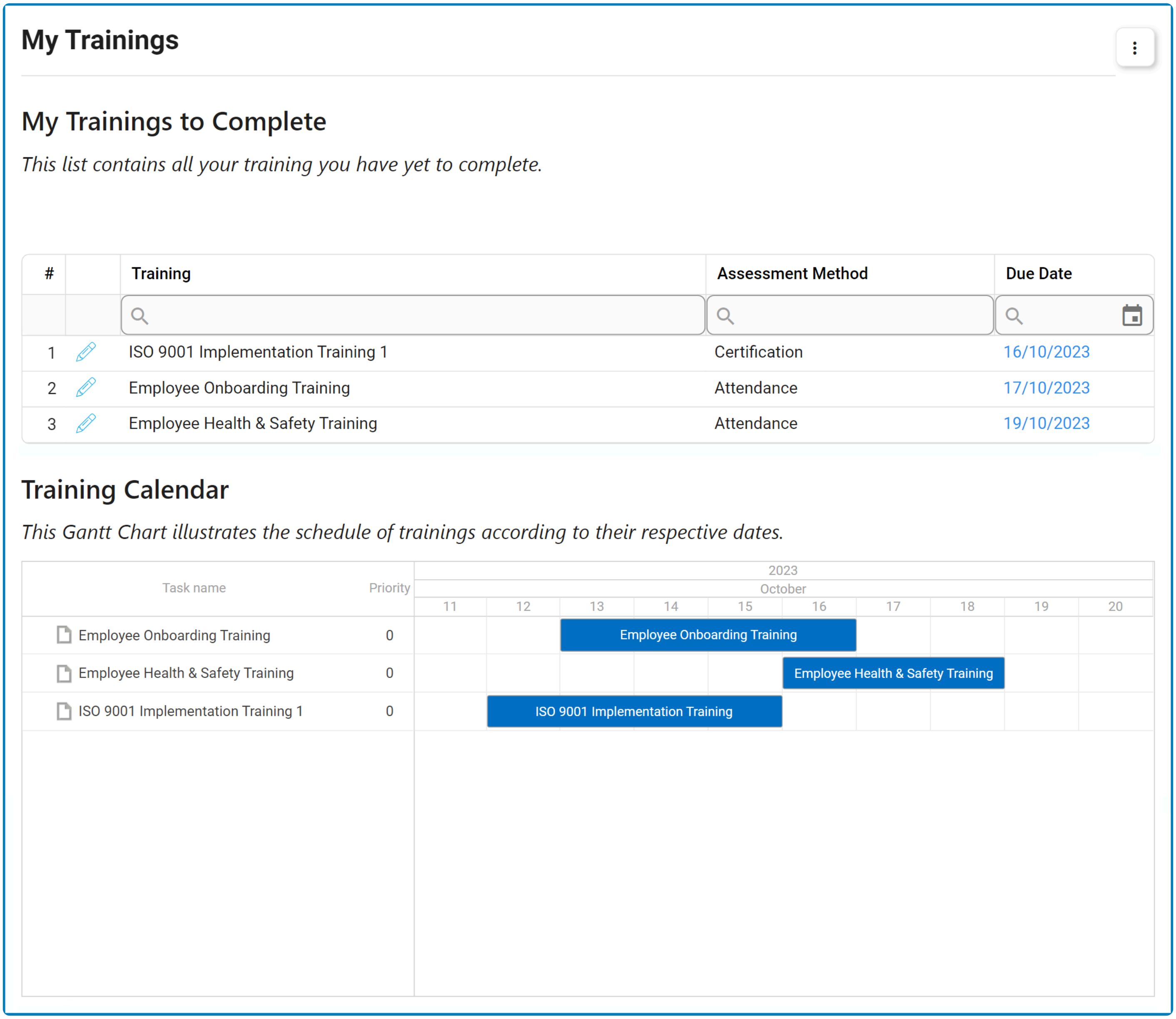
3. ***Edit ( ):*** This button allows users to edit an existing training.
    - If a training is edited, it will be sent back to the assigned manager(s) for review.

    > To edit, users can also simply double-click on the respective entry in the grid.

4. ***View ( ):*** This button allows users to view a training.
    - In viewing mode, users cannot make any modifications. They are allowed, however, to access any linked documentation or courses as well as access/download any available templates.

12. My Trainings

In this module, users can access a Gantt chart illustrating their training schedule as well as a list of their ongoing trainings.



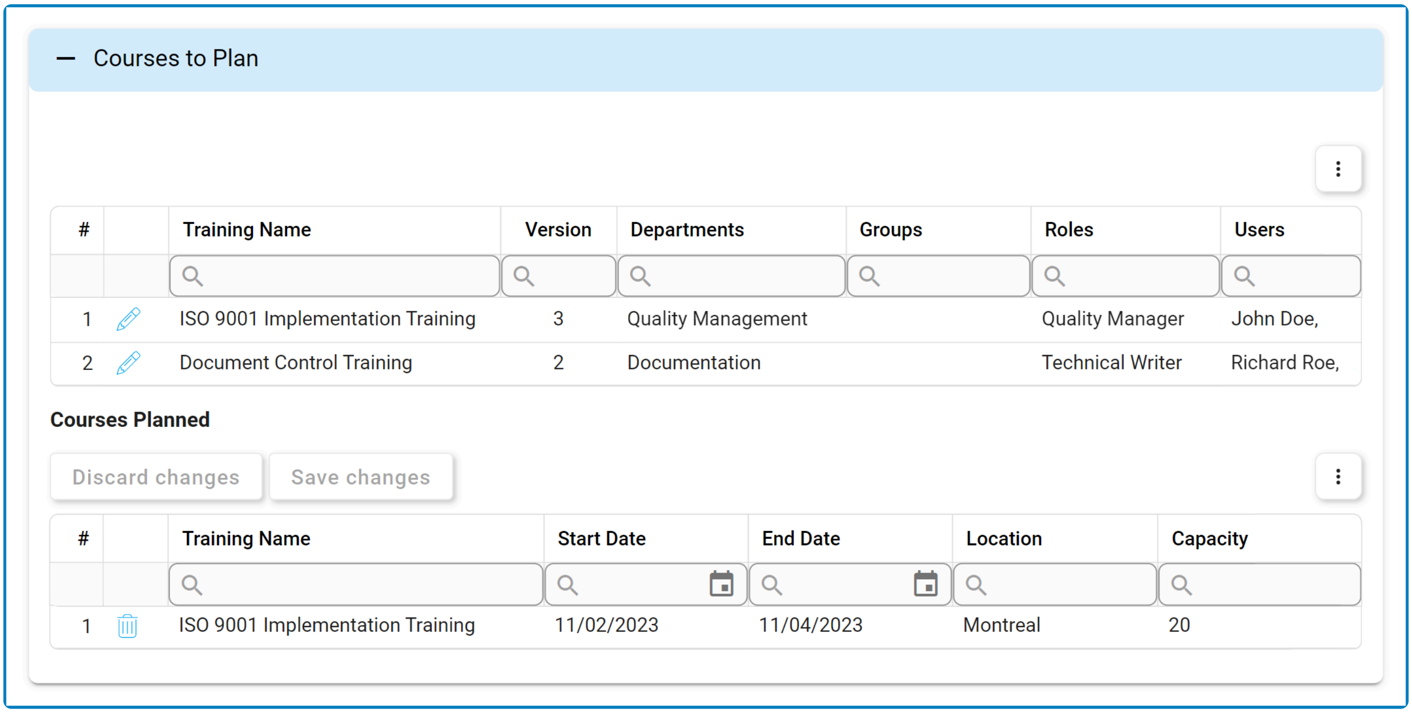
> To edit inside the Execute Training form, users can either click on the corresponding **Edit** ( ) button or double-click on the training itself.

13. My Trainings to Deliver (As an Instructor)

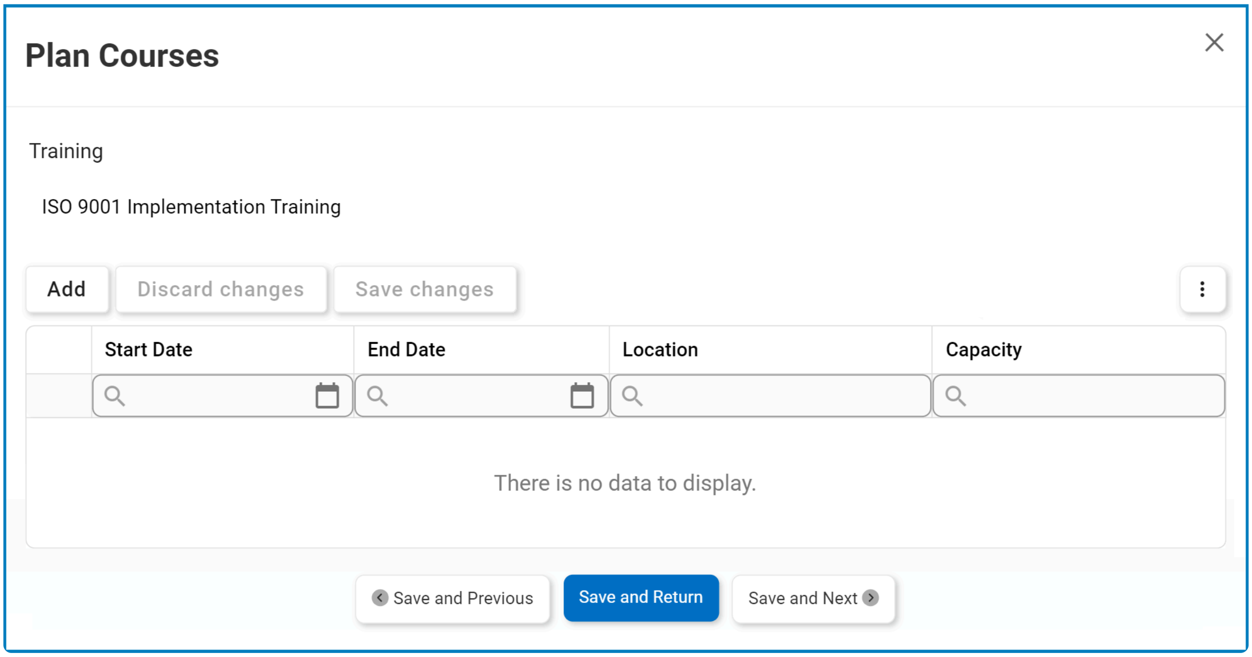
In this module, instructors can access their list of assigned trainings as well as develop their course plans.

Courses to Plan

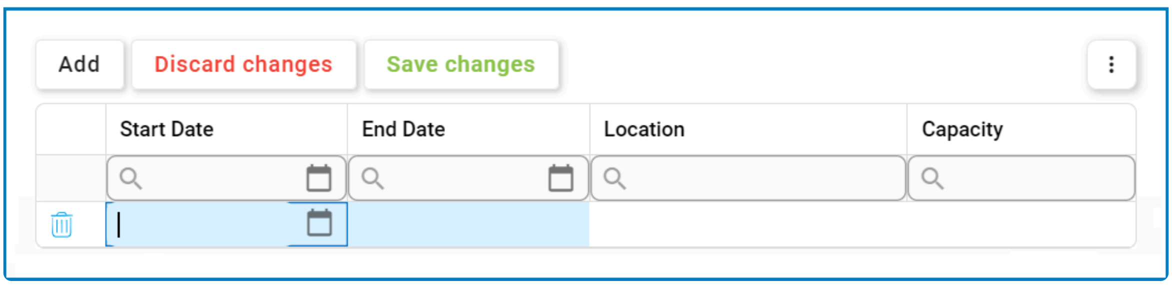
In this section of the form, users can access the list of trainings to which they have been assigned as instructor. Users can also access the grid displaying the list of courses that have been created using the Plan Courses form.



1. ***Edit ( ):*** This button allows users to edit a training definition.
   - If selected, it will display the Plan Courses form.



- *Add:* This button allows users to add a new course plan.

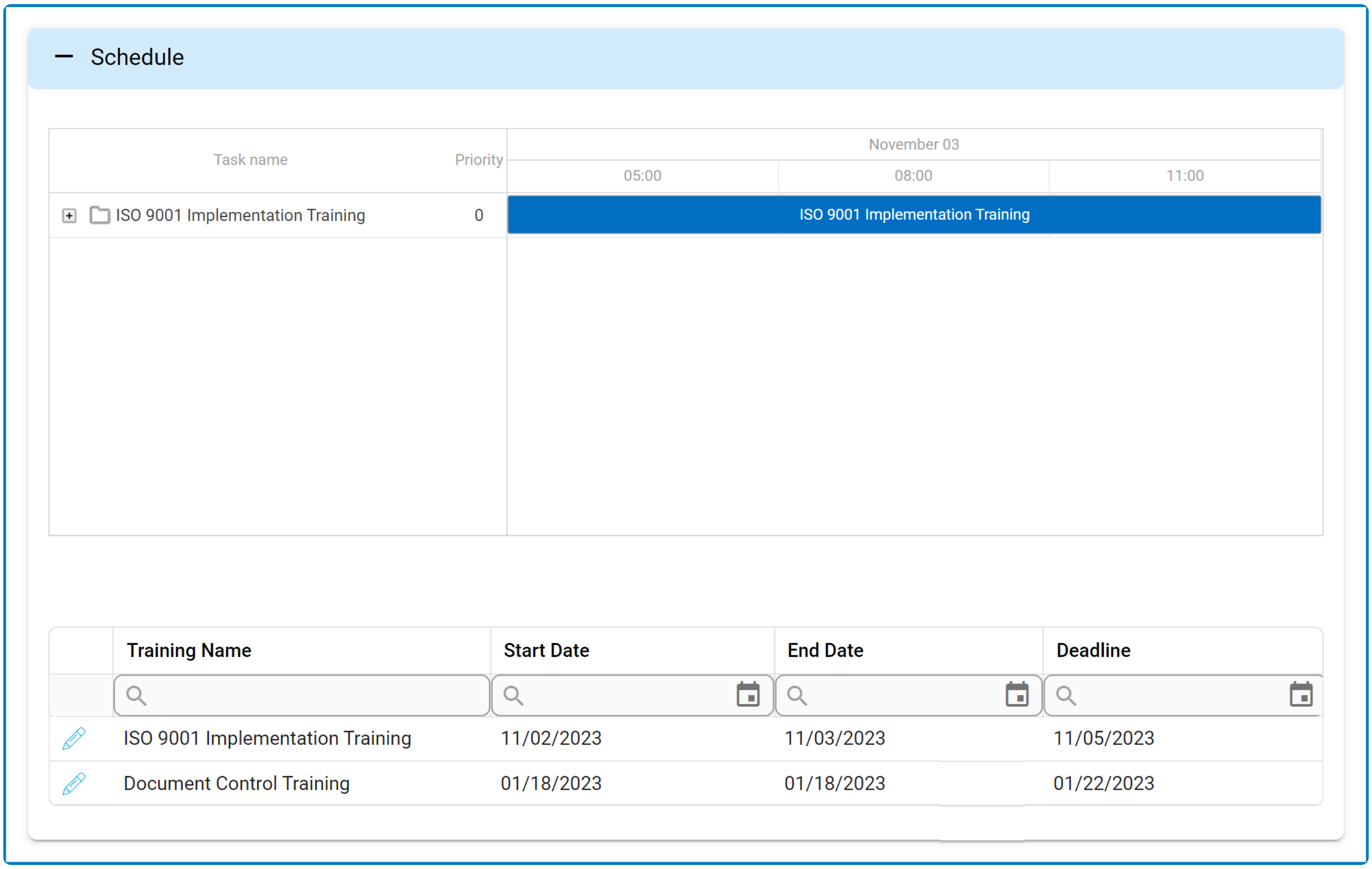


  - ***Start Date:*** This is a date picker that allows users to input/select the start date for the course.
  - ***End Date:*** This is a date picker that allows users to input/select the end date for the course.
  - ***Location:*** This is a text field that allows users to input the location of the course.
  - ***Capacity:*** This is a numeric field that allows users to input the course capacity.
- ***Discard Changes:*** This button allows users to discard their changes.
- ***Save Changes:*** This button allows users to save their changes.
- ***Delete ( ):*** This button allows users to delete a course plan.
- ***Save and Return:*** This button allows users to save their changes and return to the main form.

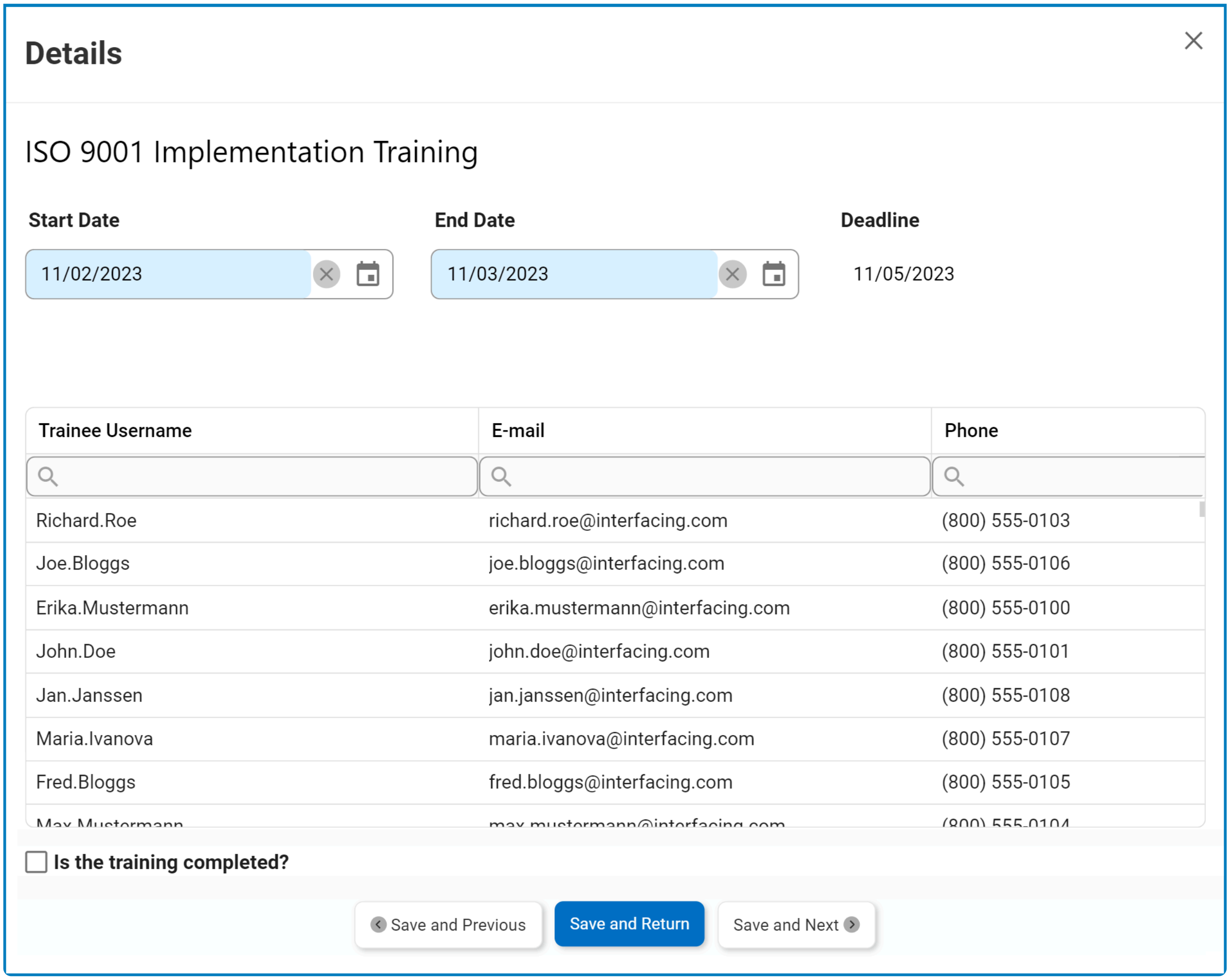
> To edit content within the grid, simply click on the element you want to modify.

Schedule

In this section of the form, users can access a Gantt chart which visualizes their course plans. Users can also access and manage details regarding their assigned trainees. These details include the progress status of the trainees as well as their contact information.



1. ***Edit ( ):*** This button allows users to edit the training details.
    - If selected, it will display the Details form.

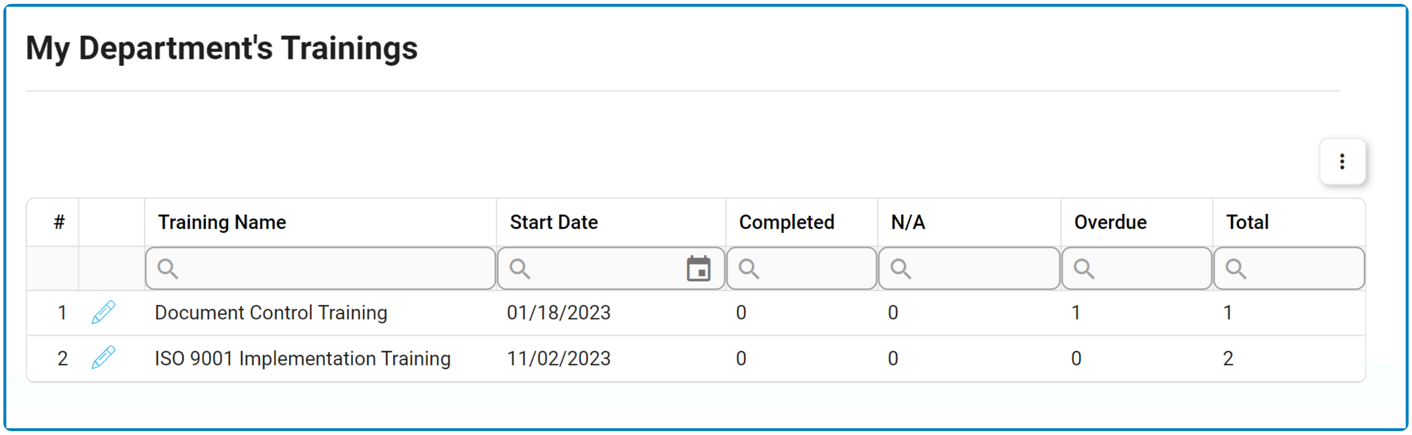


- ***Start Date:*** This is a date picker that allows users to input/select the start date of the training. It is a mandatory field.
- ***End Date:*** This is a date picker that allows users to input/select the end date of the training. It is a mandatory field.
- ***Is the Training Completed?:*** This is a checkbox which, if selected, allows users to declare the training as completed.
- ***Save and Previous:*** This button allows users to save their changes and navigate to the previous item in the grid.
- ***Save and Return:*** This button allows users to save their changes and return to the main form.
- ***Save and Next:*** This button allows users to save their changes and navigate to the next item in the grid.

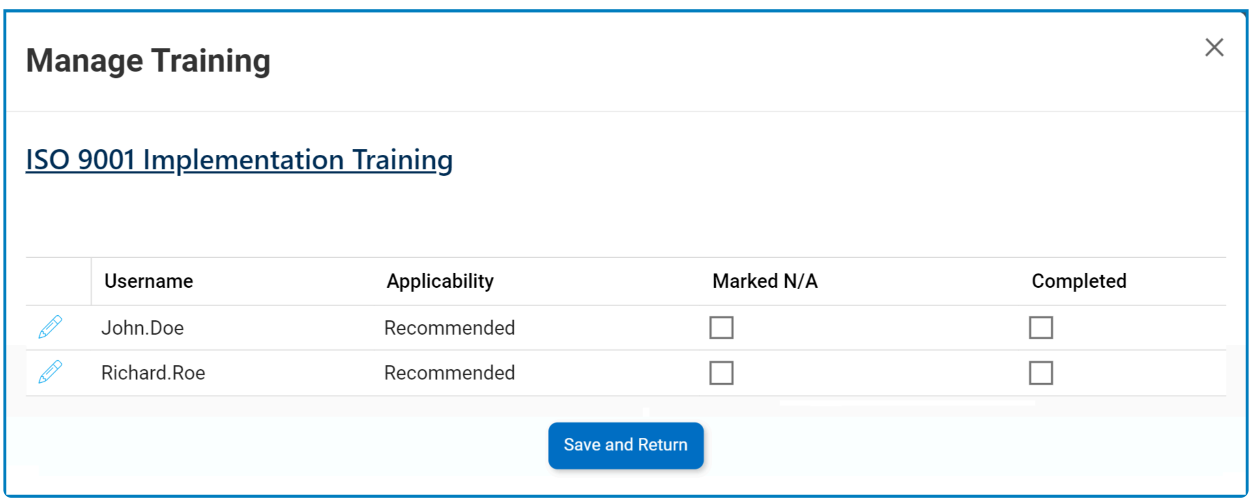
14. My Department's Trainings

In this module, department managers can access the list of trainings assigned to their department.

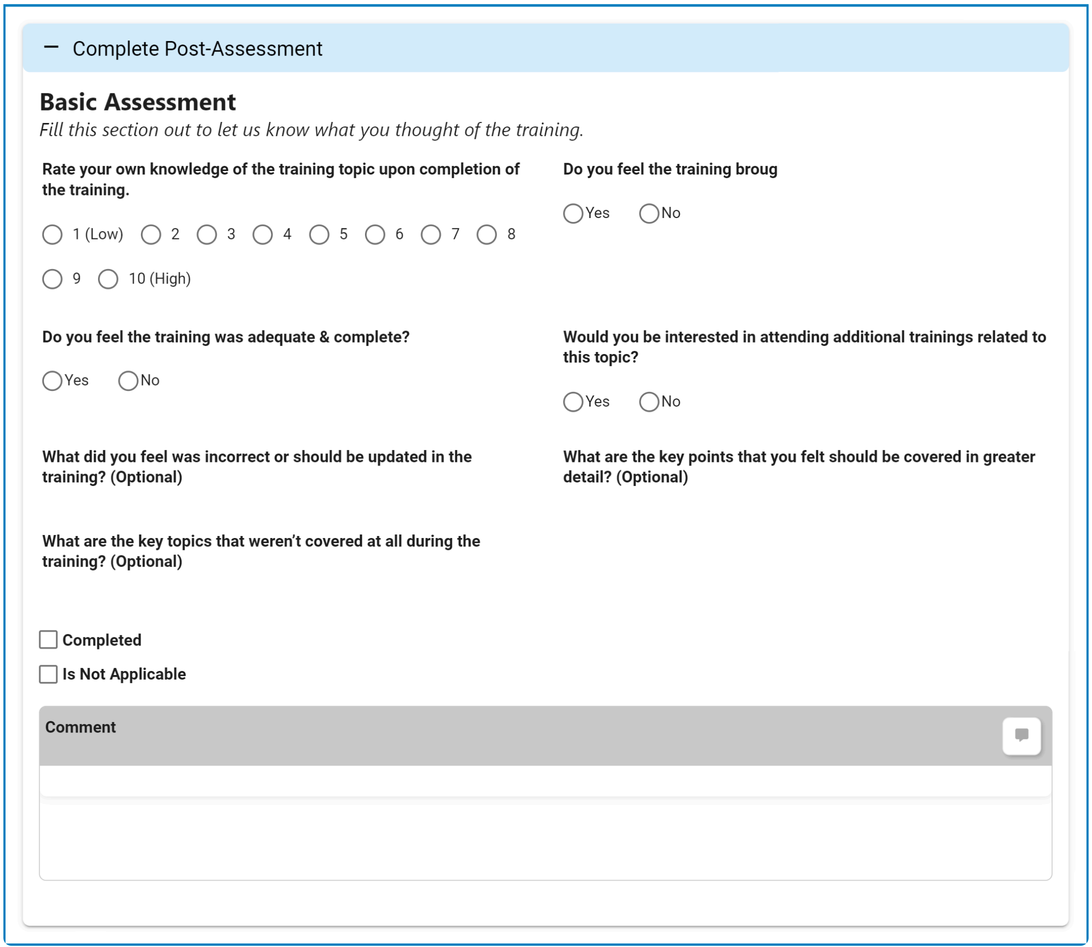
> For instructions on how to assign a user as department manager, please refer to the [Organization Management (Admin)]() module of the **Admin** application.



1. ***Edit ( ):*** This button allows users to access the training details.
   - If selected, it will open a pop-up window with the Manage Training form.



   - ***Edit ( ):*** This button allows users to access the training details for a specific trainee.
     - If selected, it will open a pop-up window with the Manage Applicability form. This form, largely mirroring the [Execute Training]() form, presents most fields in a read-only format. In the [Complete Post-Assessment]() accordion, however, users are allowed to declare the training as either complete or not applicable for the trainee.



- ***Completed:*** This is a checkbox which, if enabled, allows users to declare the training as complete.
- ***Not Applicable:*** This is a checkbox which, if enabled, allows users to declare the training as not applicable.
- ***Comment:*** This field allows users to input their comments.
  - For more details on this field, click here.
- ***Save and Return:*** This button allows for users to save their changes and return to the Manage Training form.

> If a training has been marked as either complete or not applicable for the trainee, it will be removed from the trainee's task list.

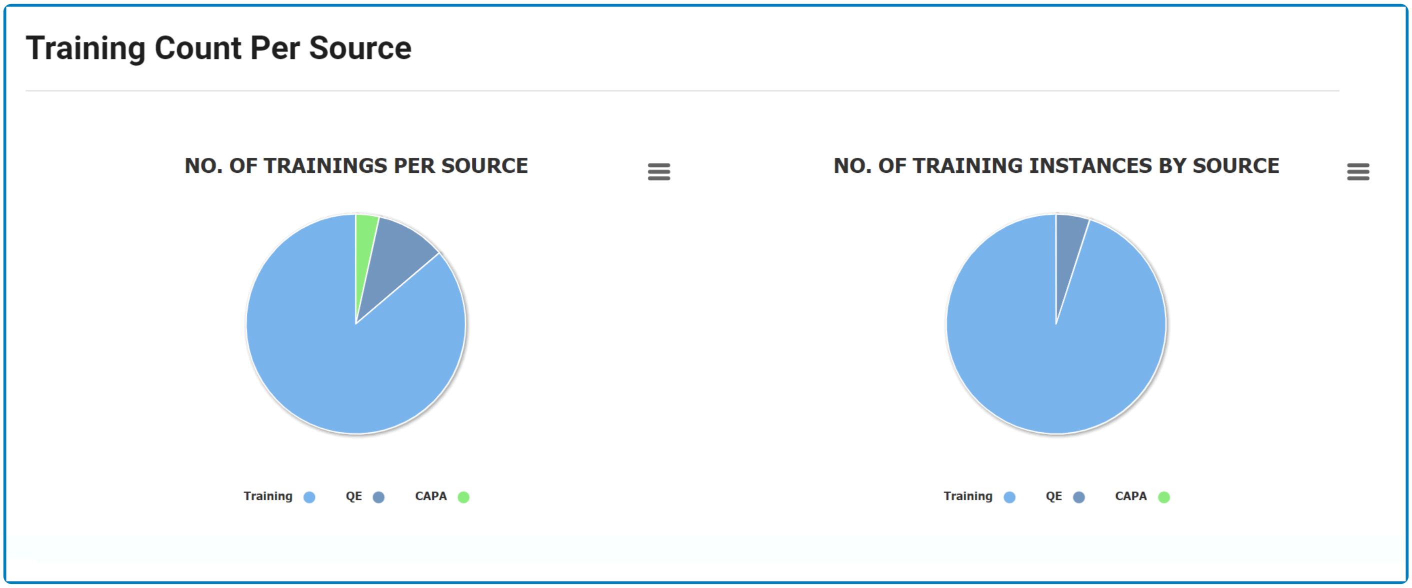
- ***Save and Return:*** This button allows for users to save their changes and return to the main form.

> If the applicability for the training has been set as mandatory, the department manager can only mark the training as complete for the trainee.

! If a training has been marked as not applicable for the trainee, it will remain that way indefinitely. In other words, when the training is next triggered, even if the trainee has been assigned to it, they will not receive it.

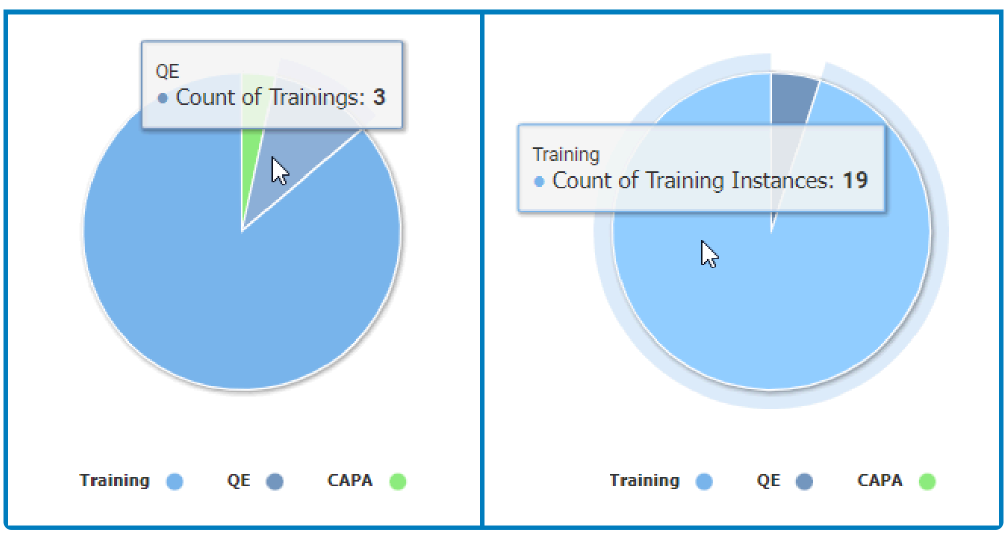
15. Training Count Per Source

In this module, users can access visual representations of training statistics. Specifically, users can access data representing the number of trainings or training instances created per **QMS** application.

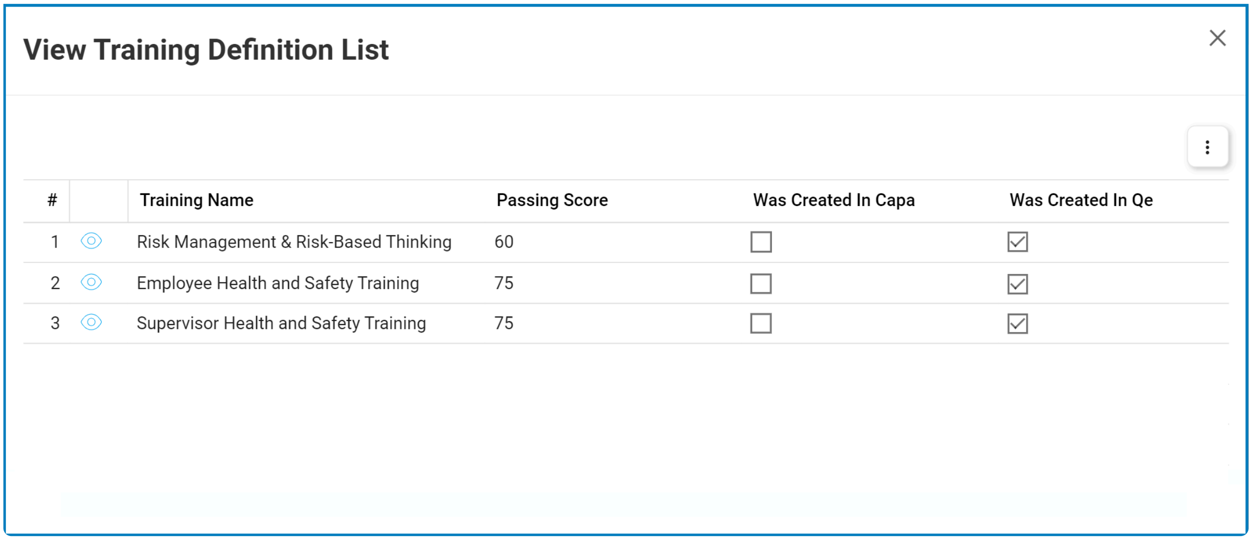


For more guidance on how to utilize interactive charts, click here.

1. ***Training Count:*** This is quantitative data that users can access by hovering their cursor over the different symbols in the charts. (Symbols, in this case, refers to the slices/sectors of the pie charts).



2. ***Drilldown Reports:*** These are data reports that users can access by double-clicking on the different symbols in the charts. (Symbols, in this case, refers to the slices/sectors of the pie charts).
   - For example, if users were to double-click on the sector representing trainings created using the **QE** application, a pop-up window would appear with the following form:

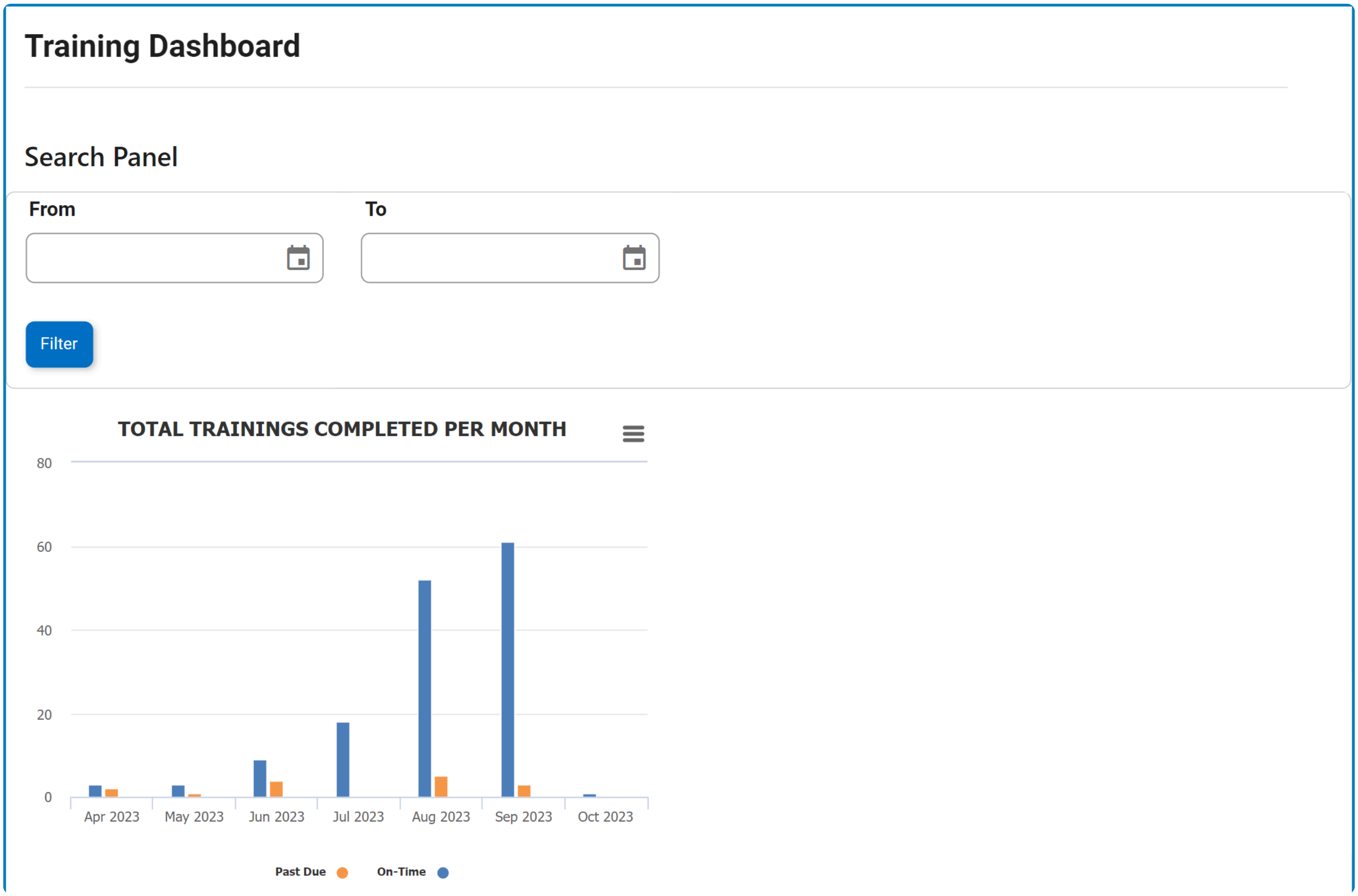


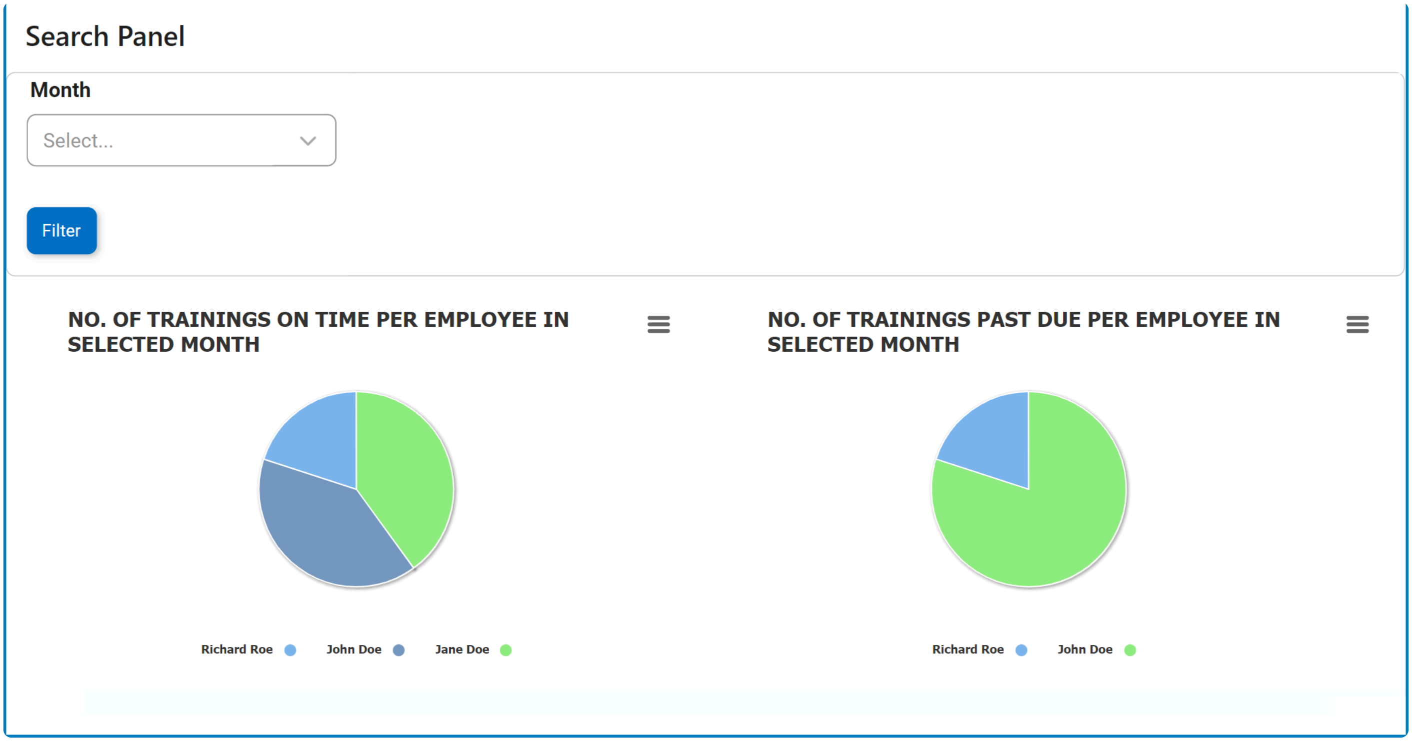
- ***View:*** This button allows users to view a training.
  - In viewing mode, users cannot make any modifications. They are allowed, however, to access any linked EPC objects as well as access/download any available templates.

> Both pie charts in this form are equipped with a drilldown functionality. By double-clicking on a sector of the pie chart, users are essentially drilling down data. They are moving from the summary report visualized by the graph to the detailed report that created it.

16. Training Dashboard

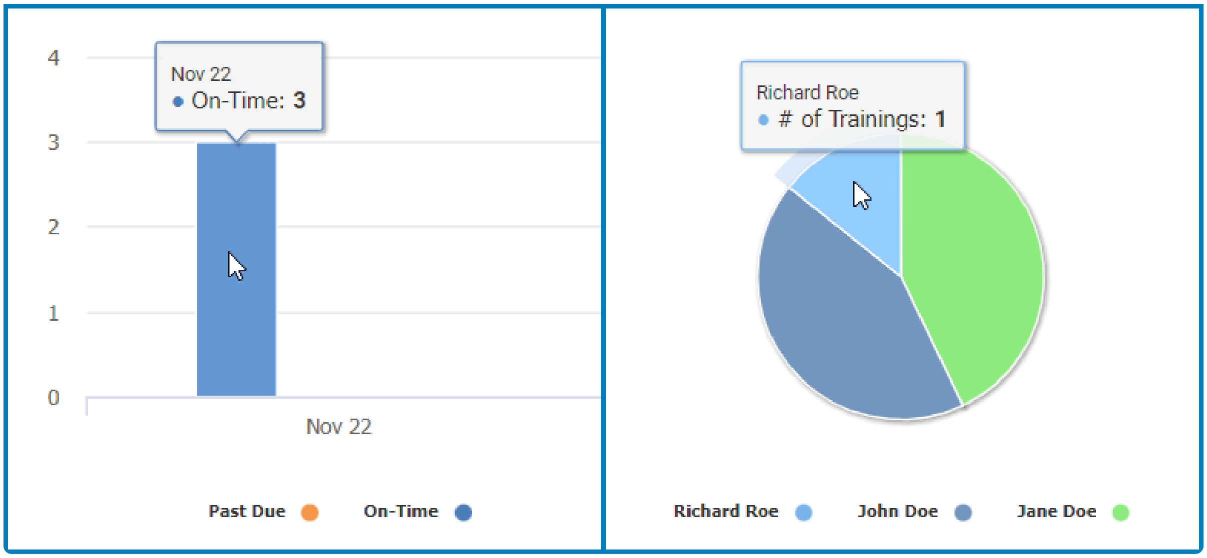
In this module, users can access visual representations of training statistics.





For more guidance on how to utilize interactive charts, click here.

1. ***From:*** This is a date picker that allows users to input/select the From date.
2. ***To:*** This is a date picker that allows users to input/select the To date.
3. ***Filter:*** This button allows users to filter the results according to the selected date range.
4. ***Month:*** This is a single-select dropdown field that displays the list of applicable months. It allows users to select only one value at a time from the dropdown.
5. ***Apply (2):*** This button filters the results according to the selected month.
6. ***Chart Context Menus:*** These are hamburger buttons which, when collapsed, display a list of options that allow users to either print or download the chart.
7. ***Training Count:*** This is quantitative data that users can access by hovering their cursor over the different symbols in the charts. (Symbols, in this case, refers to the bars of the bar chart and the slices of the pie charts).



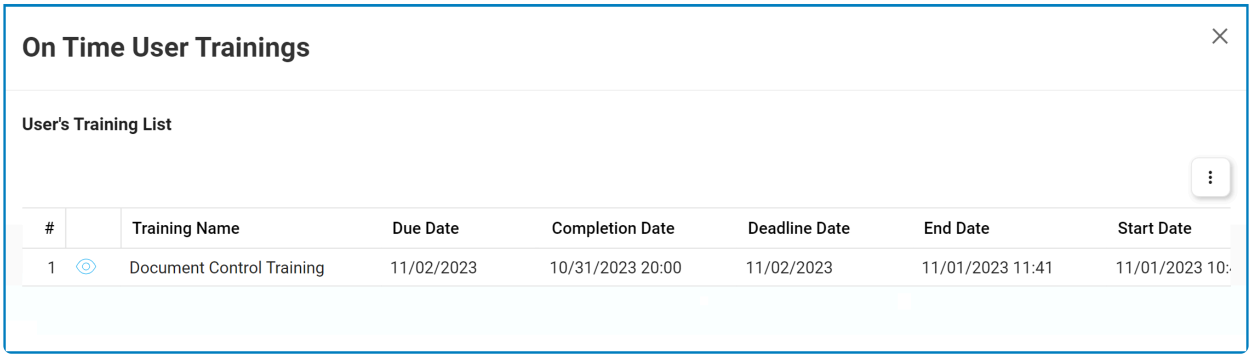
8. ***Drilldown Reports:*** These are data reports that users can access by double-clicking on the different symbols in the charts. (Symbols, in this case, refers to the slices/sectors of the pie charts and the bars of the bar chart).
    - For example, if users were to double-click on the bar representing trainings that have been completed on time, a pop-up window would appear with the following form:

Completed Trainings In Month

Completed Trainings in the selected month

#		Due Date	Completion Date	Is Completed	ReTraining Count	Training Deadline
1		09/24/2023	09/26/2023	☑	1	09/23/2023
2		09/14/2023	09/28/2023	☑		09/13/2023
3		09/09/2023	09/11/2023	☑	18	09/08/2023

        - ***View:*** This button allows users to view a training.
            - In viewing mode, users cannot make any modifications. They are allowed, however, to access any linked EPC objects as well as access/download any available templates.
    - Likewise, if users were to double-click on the sector representing trainings that have been completed on time by employee Richard Roe, a pop-up window would appear with the following form:



On Time User Trainings

User's Training List

#		Training Name	Due Date	Completion Date	Deadline Date	End Date	Start Date
1		Document Control Training	11/02/2023	10/31/2023 20:00	11/02/2023	11/01/2023 11:41	11/01/2023 10:

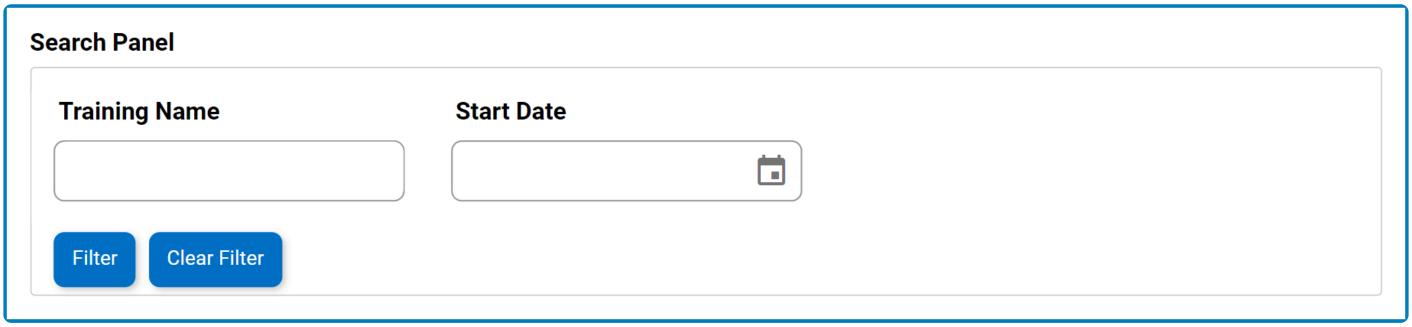
✻ All charts in this form are equipped with a drilldown functionality. By double-clicking on a chart symbol, users are essentially drilling down data. They are moving from the summary report visualized by the graph to the detailed report that created it.

17. Training History Report

In this module, users can access a history report of all trainings.

Search Panel

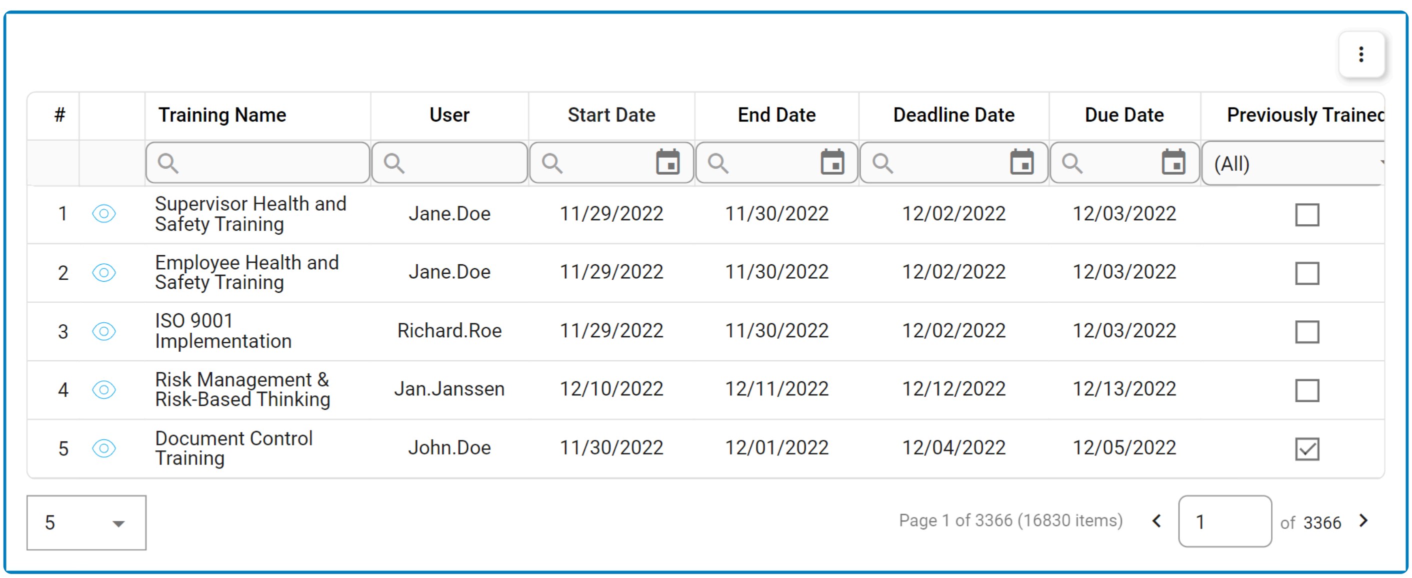
All fields inside the search panel act as search boxes. Any value inputted inside them will be, upon request, searched for in the grid and, if possible, retrieved.



1. ***Training Name:*** This is a text field that allows users to filter by the name of the training.
2. ***Start Date:*** This is a date picker that allows users filter by the start date.
3. ***Filter:*** This button filters the results according to the entered search criteria.
4. ***Clear Filter:*** This button clears the filters that were used in the previous search and allows users to again view the full data set.

Grid

Inside the grid, trainings are organized by values derived from the [Conduct Trainings](#) workflow.



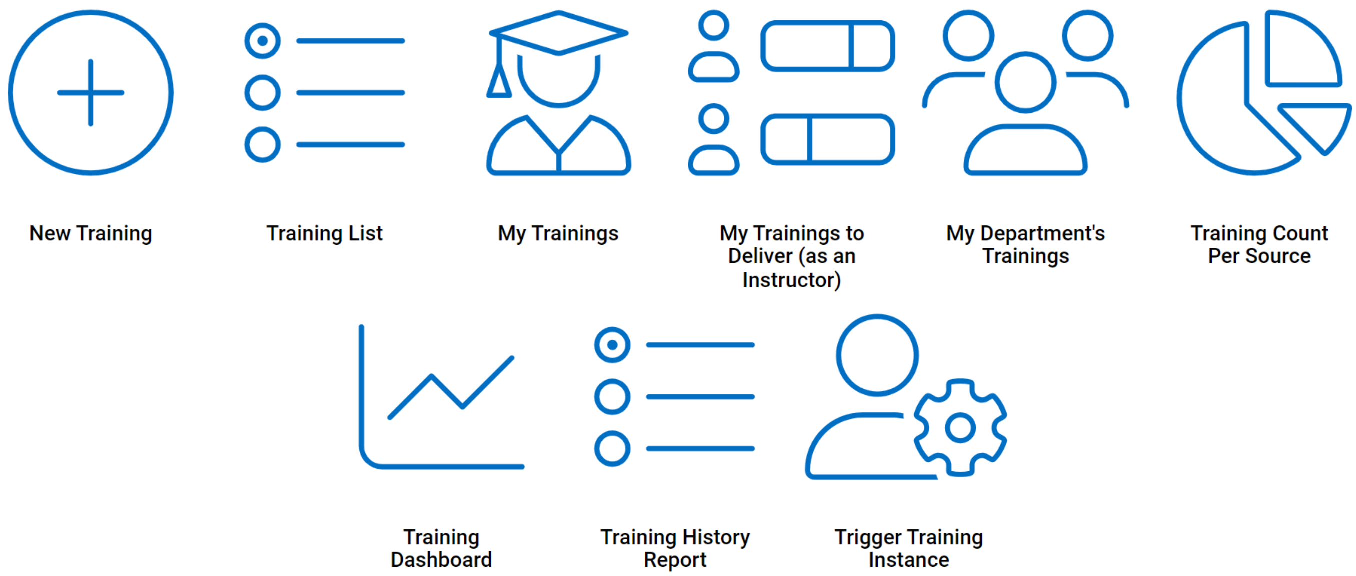
- ***View ( ):*** This button allows users to view a training.
  - In viewing mode, users cannot make any modifications. They are allowed, however, to access

any linked documentation or courses as well as access/download any available templates.

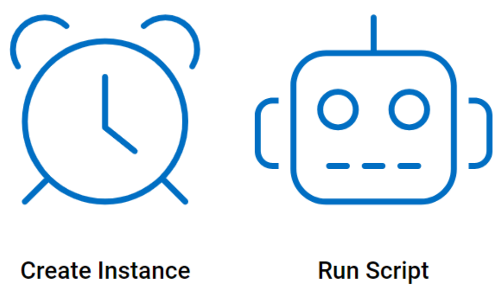
18. Trigger Training Instance

To access **Trigger Training Instance**, take the following steps:

1. Click on the **Training** application.
2. Selecting **Training** directs users to this subpage. Click on **Trigger Training Instance**.

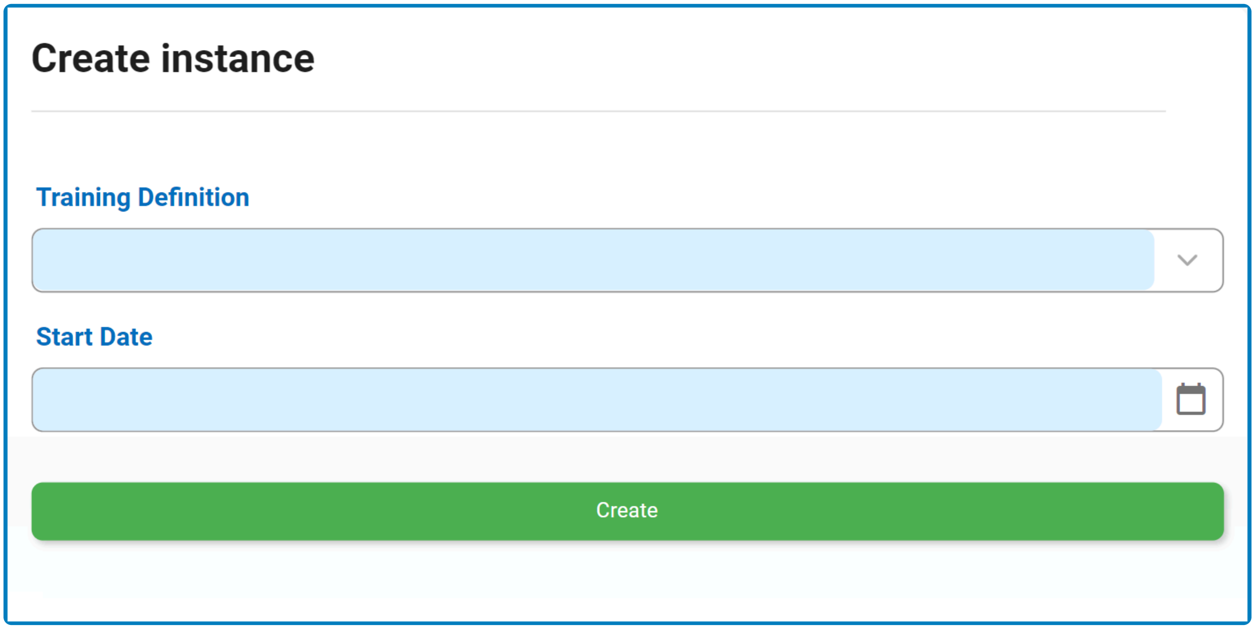


3. Selecting **Trigger Training Instance** directs users to the following modules:
   - Create Instance
   - Run Script



18.1. Create Instance

This module is used purely for trial and demonstration purposes. It allows users to manually create and start an instance of the Conduct Trainings workflow. Users will be guided on how to navigate this workflow throughout the **Create Instance** portion of this manual.



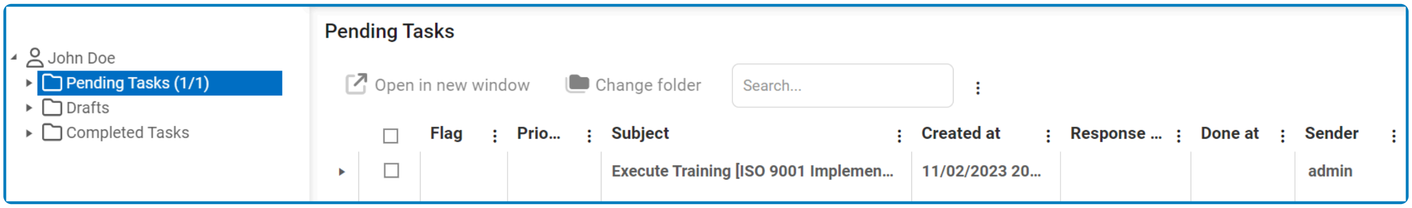
1. ***Training Definition:*** This is a single-select dropdown field that retrieves the list of training definitions from the Training List. It is a mandatory field.
   - For more details on this type of dropdown, click here.
2. ***Start Date:*** This is a date picker that allows users to input/select the start date of the selected training.

For the training to begin instantaneously, the date selected should be today's date.

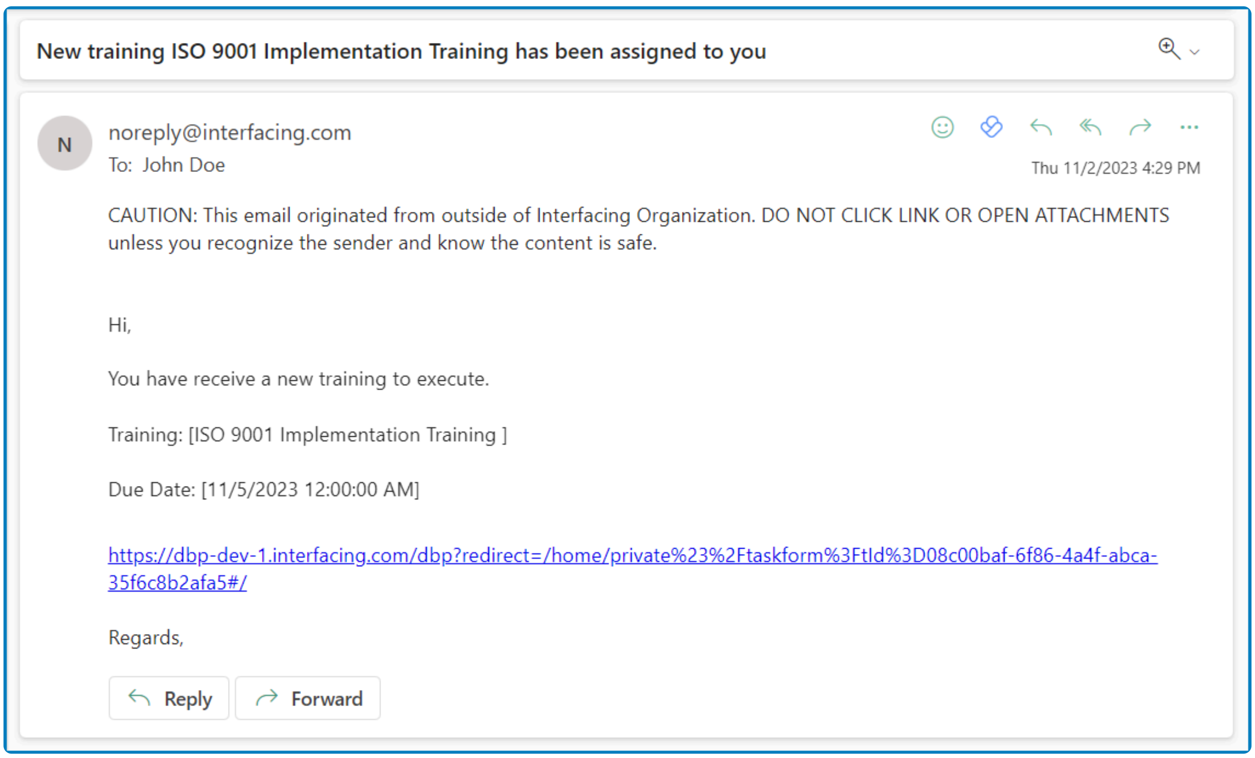
3. ***Create:*** This button allows users to create the instance.
   - Once selected, it will trigger the assignment of the selected training.
     - For more details on this task assignment, click here.

18.1.1. Execute Training

Once a training has been defined and triggered, the assigned trainees will receive a notification in their **Pending Tasks** prompting them to execute the training.

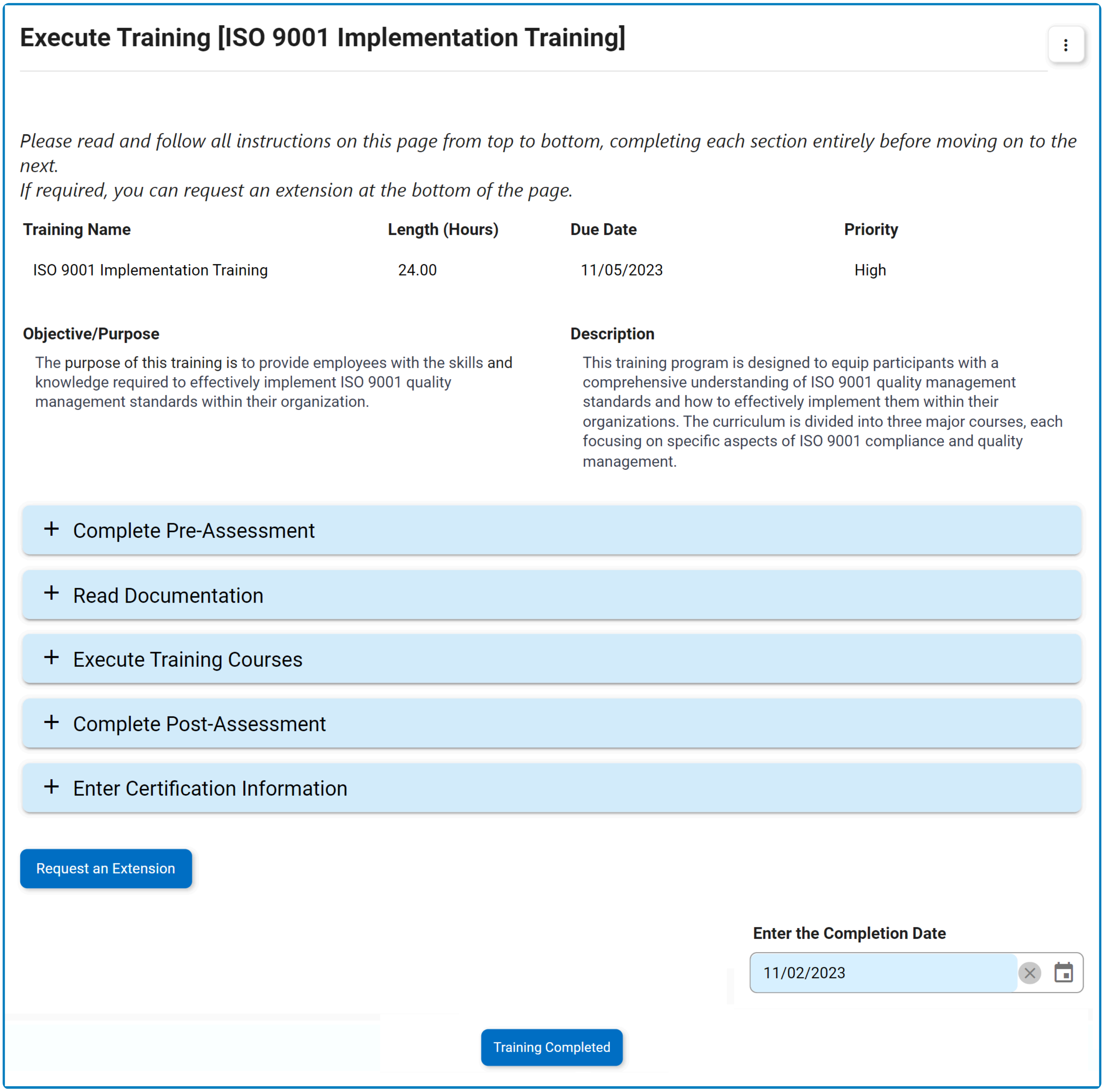


They will also receive an email notification informing them of the assigned task.

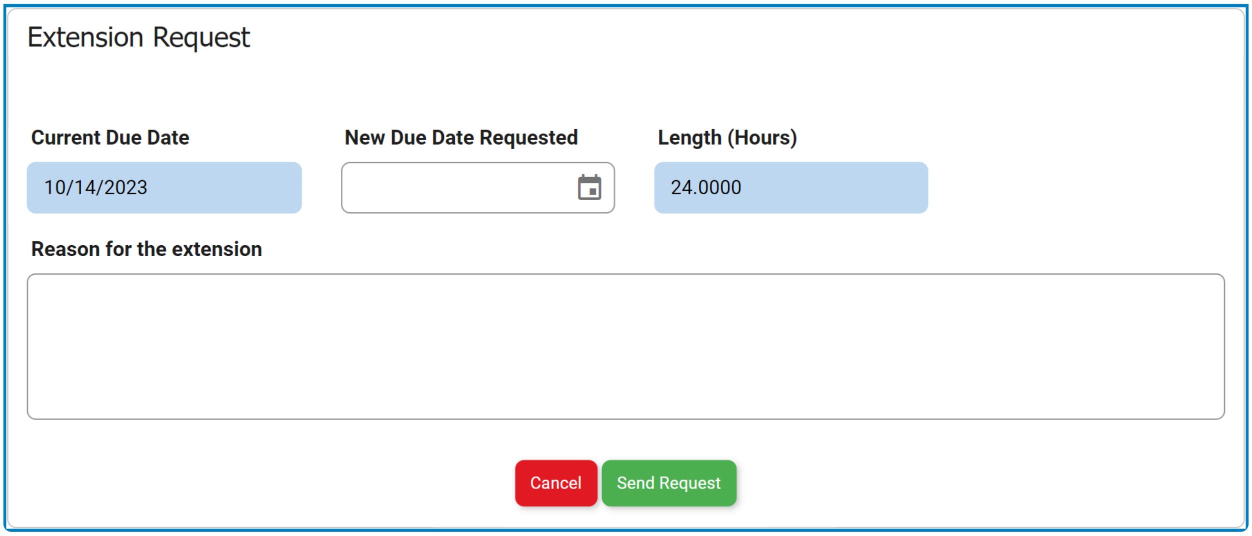


Clicking on either the subject in **Pending Tasks** or the link in the email will direct the user to the Execute Training form.

Users can also access the Execute Training task from EPC. For more details on this approach, click here.



1. ***Accordions:*** The available accordions in this form may vary based on the applied phases and chosen assessment method for the training. All potential accordions that can appear in the form are listed below:
    - Complete Pre-Assessment
    - Read Documentation
    - Execute Training Courses
    - Complete Post-Assessment
    - Enter Certification Information
2. ***Request an Extension:*** This button allows users to request an extension for the training deadline.
    - If selected, it will reveal the extension request section, where users can input their requested new due date and provide a reason for the extension.

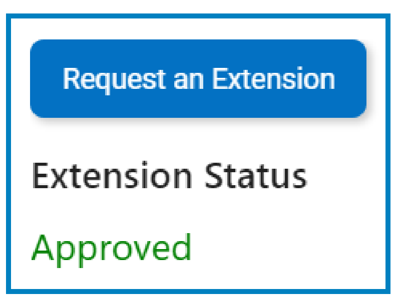


- ◦ ***Send Request:*** This button allows users to send the extension request to the assigned manager(s) of the training, as determined by the **Training Execution Sign-Off** dropdown in the New Training form.
  - ▪ The assigned manager(s) will receive the New Extension Request form.
- ◦ ***Cancel:*** This button allows users to cancel the extension request and hide the section.
- **Extension Request Status Tracking**

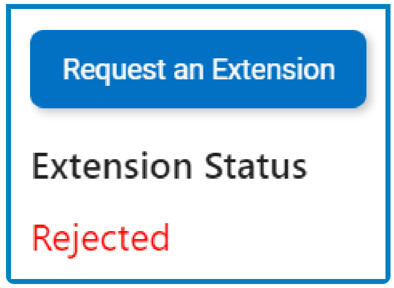
  Trainees can monitor the status of their extension requests. There are three possible states:

  - **Extension Status: Pending** indicates that the extension request is awaiting approval.
    - ◦ The **Request an Extension** button is hidden until a decision is made.

  - **Extension Status: Approved** indicates that the extension request has been approved.
    - ◦ The **Request an Extension** button reappears, allowing users to send additional extension requests if needed.



    - **Extension Status: Rejected** indicates that the extension request has been rejected.
        - The **Request an Extension** button reappears, allowing users to send additional extension requests if needed.



> Trainees can send multiple extension requests, with the status updating according to the latest request.

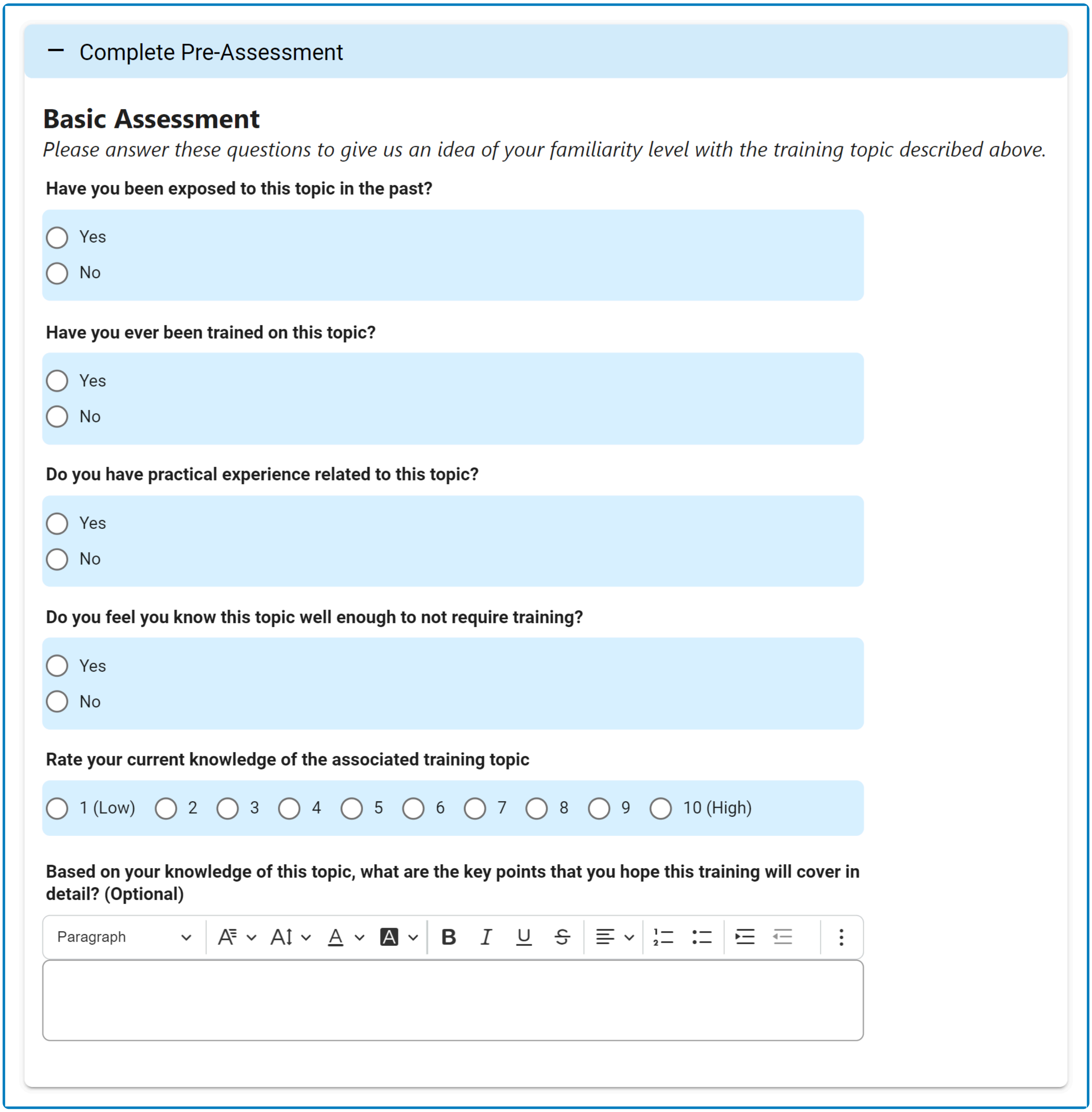
3. ***Enter the Completion Date:*** This is a date picker that allows users to input/select completion date for the training.
    - By default, the current date and time will automatically populate this field. Users can still modify this entry.
4. ***Training Completed:*** This button allows users to submit the completed training.
    - Users cannot submit the form until they have gone through each accordion and filled out all mandatory fields.

> ! If a passing score has been set for the post-training assessment, upon completion of the training, the system will automatically check the obtained score. If users receive a score lower than the required minimum, re-training will be automatically triggered.

18.1.1.1. Complete Pre-Assessment

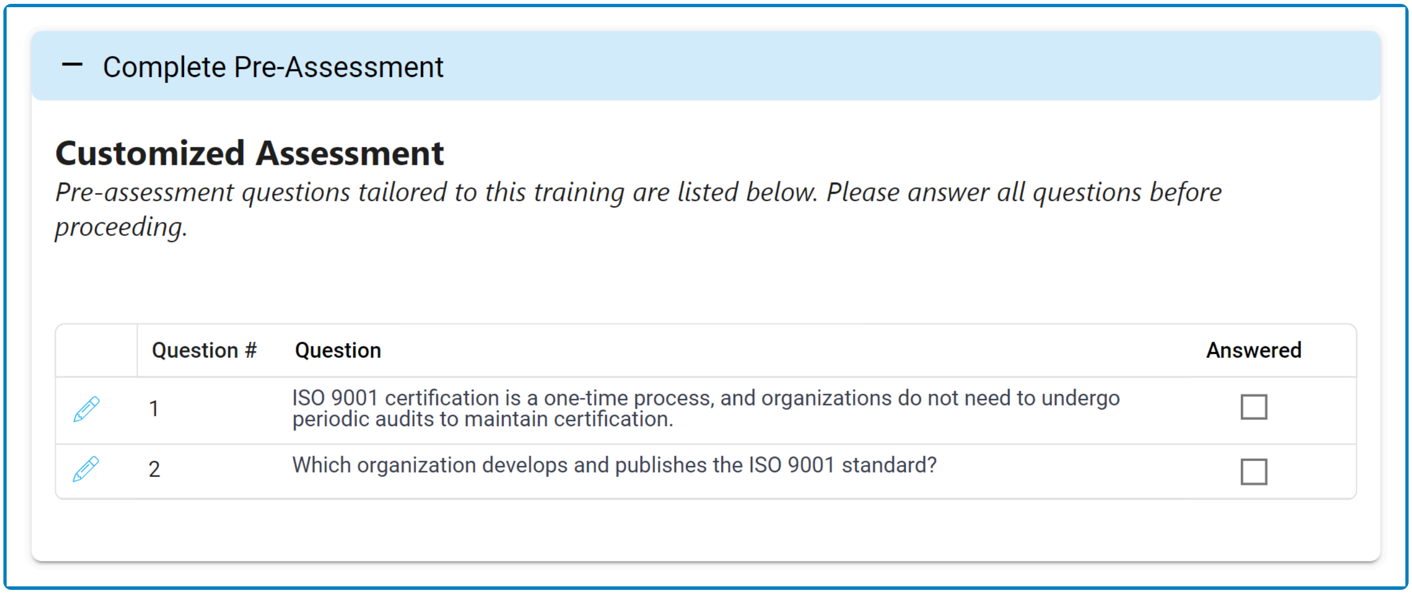
In this accordion, users can access and complete the pre-assessment. The content displayed here may vary depending on the type of questionnaires chosen for the pre-assessment.

1. **Basic Assessment:** If the **Default Pre-Training Questionnaire** option was selected, users will have access to the basic assessment.



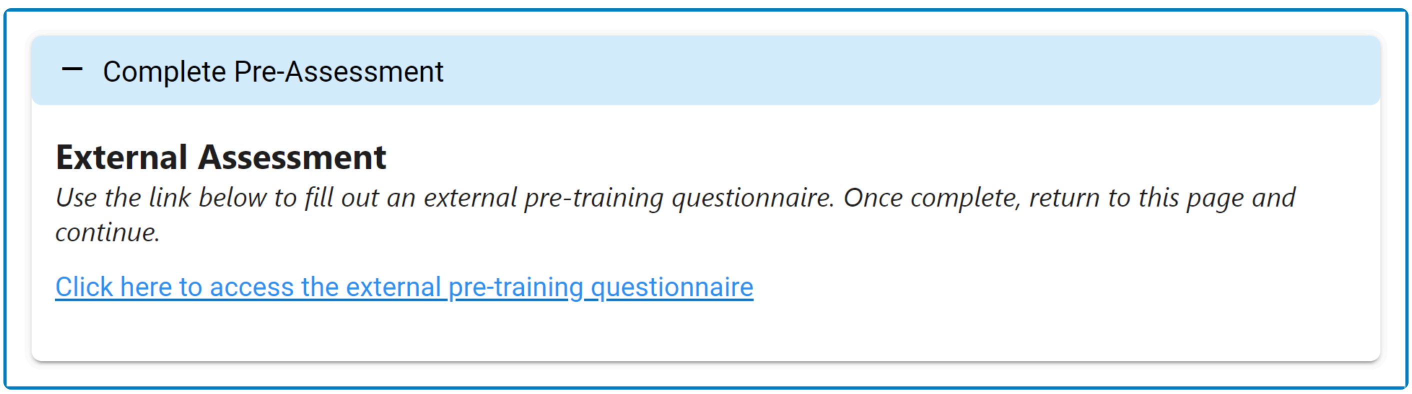
2. **Customized Assessment:** If the **Customized Questionnaire** option was selected, users will have

access to the customized assessment.



> To answer a question, users can either click on the corresponding **Edit** ( ) button or simply double-click on the question itself.

3. **External Assessment:** If the **External Questionnaire** option was selected, users will have access to the external assessment.



> To access the external assessment, simply click on the provided hyperlink.

18.1.1.2. Read Documentation

In this accordion, users can access the assigned reading materials and training documentation.

— Read Documentation

Read all of the documentation in this section.

Make sure you've fully completed the pre-assessment section before proceeding.

Documentation Overview

Primary Documentation:

- **ISO 9001 Standard:** The ISO 9001 Standard serves as the foundational document for understanding the principles and requirements of a quality management system.

Supporting Documentation:

- **Quality Policy:** This covers the communication and awareness of the quality policy and the process of setting and reviewing quality objectives.
- **Document Control:** This focuses on document development and management, as well as document retrieval and distribution.

Process Name	Link to Docum...	Description
Document Retrieval and Distribution	Click here	This is the process by which authorized personnel within the organization retrieve
Document Development & Management	Click here	This is the process by which documents are created, reviewed, approved, and stored in the

— *Read Secondary Documentation*

The documentation in this section supplements the rest of the training material.

Rule Name	Link to Docu...	Description
Setting and Reviewing Quality Objectives	Click here	The organization shall define quality objectives, which are consistent with the
Communication and Awareness	Click here	The organization shall ensure that the quality policy is communicated to all employees and

Other Documentation

Additional documentation can be accessed using the link(s) below.

Supporting Do...	Link to Documentation	Documentation Description
(All)		
☐	ISO 9001 Standard	This link directs users to the official ISO website where they can access the complete ISO 9001 standard. It is essential for understanding the specific requirements and principles of ISO 9001, which serve as the foundation for a quality management system.

✻ Primary documentation is readily available via the main accordion. Secondary or supporting documentation, intended to supplement the primary materials, is distinguishable as it is accessible within a sub-accordion. To view the linked documentation, simply click on the corresponding hyperlink.

18.1.1.3. Execute Training Courses

In this accordion, users can execute the assigned training courses.

— Execute Training Courses

Training courses have been prepared for you. Complete all courses before proceeding.

Training Course Overview

Course Outline:

- **Day 1: Understanding ISO 9001 Standards and Framework**
  - Introduction to ISO 9001
  - ISO 9001 Requirements
  - Scope and Context
  - Leadership and Commitment
- **Day 2: Implementing ISO 9001 in Your Organization**
  - Planning and Risk Management
  - Process Approach and Documentation

Format	Location	Instructor
Onsite Instructor led	Office	Jane Doe

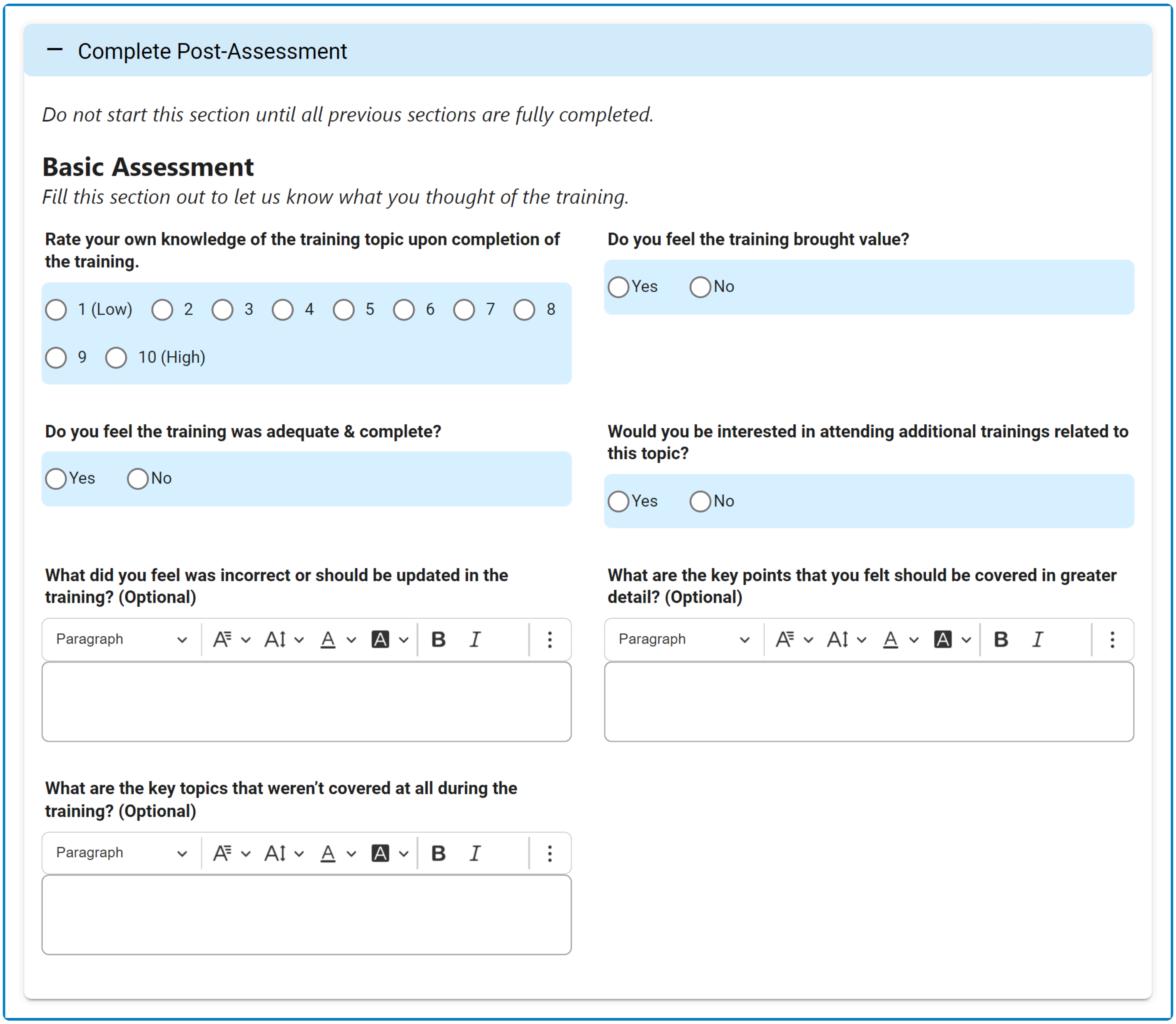
Training Course URL	Training Course Description
ISO 9001 Implementation and Management	Learn planning, risk management, process approach, and monitoring for ISO 9001.
Quality Assurance and Auditing for ISO 9001	Gain skills for internal audits, corrective actions, management review, and ISO 9001 certification.
Fundamentals of ISO 9001 Compliance	Understand ISO 9001 requirements, scope, leadership, and commitment.

To access the training course, simply click on the corresponding hyperlink.

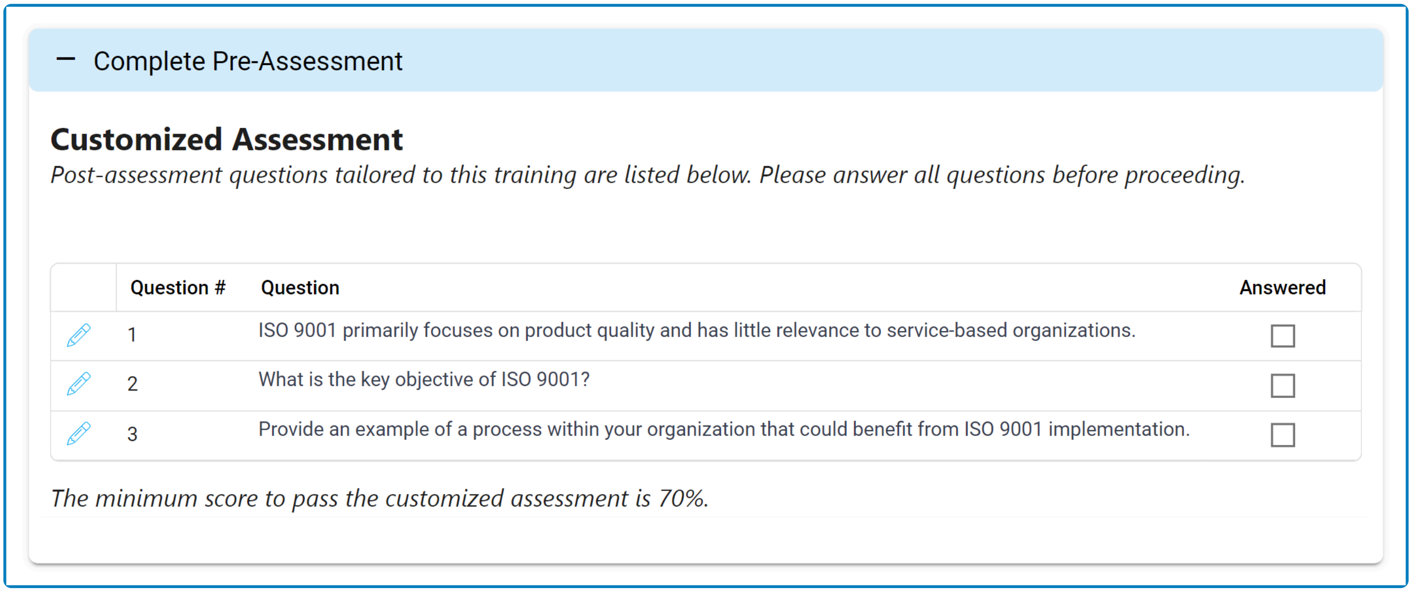
18.1.1.4. Complete Post-Assessment

In this accordion, users can access and complete the post-assessment. The content displayed here may vary depending on the type of questionnaires chosen for the post-assessment.

1. **Basic Assessment:** If the **Default Post-Training Questionnaire** option was selected, users will have access to the basic assessment.



2. **Customized Assessment:** If the **Customized Questionnaire** option was selected, users will have access to the customized assessment.



— Complete Pre-Assessment

Customized Assessment

Post-assessment questions tailored to this training are listed below. Please answer all questions before proceeding.

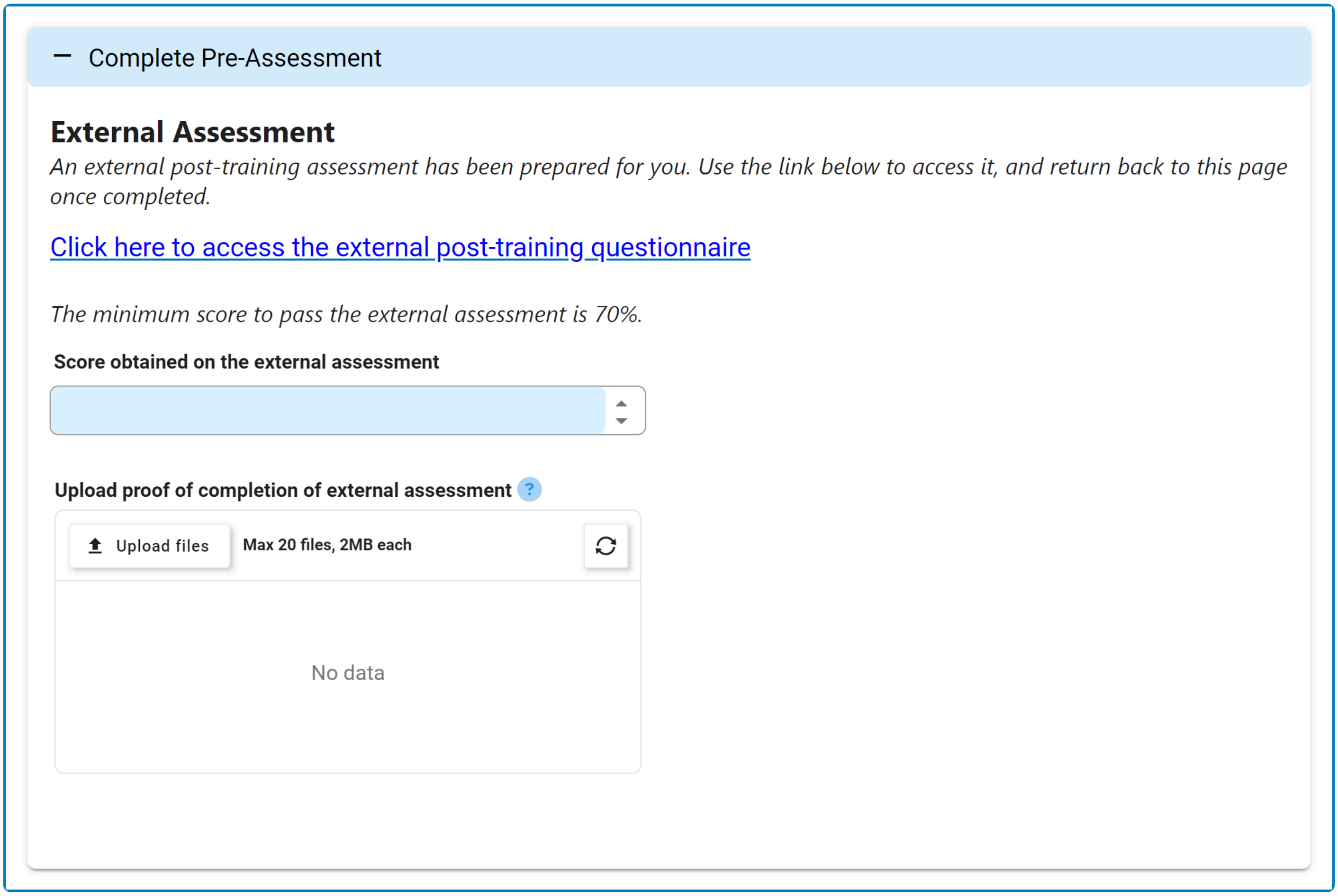
	Question #	Question	Answered
	1	ISO 9001 primarily focuses on product quality and has little relevance to service-based organizations.	☐
	2	What is the key objective of ISO 9001?	☐
	3	Provide an example of a process within your organization that could benefit from ISO 9001 implementation.	☐

The minimum score to pass the customized assessment is 70%.

To answer a question, users can either click on the corresponding **Edit** ( ) button or simply double-click on the question itself.

If a passing score has been set for the post-training assessment, upon completion of the training, the system will automatically check the obtained score. If users receive a score lower than the required minimum, re-training will be automatically triggered.

3. **External Assessment:** If the **External Questionnaire** option was selected, users will have access to the external assessment.



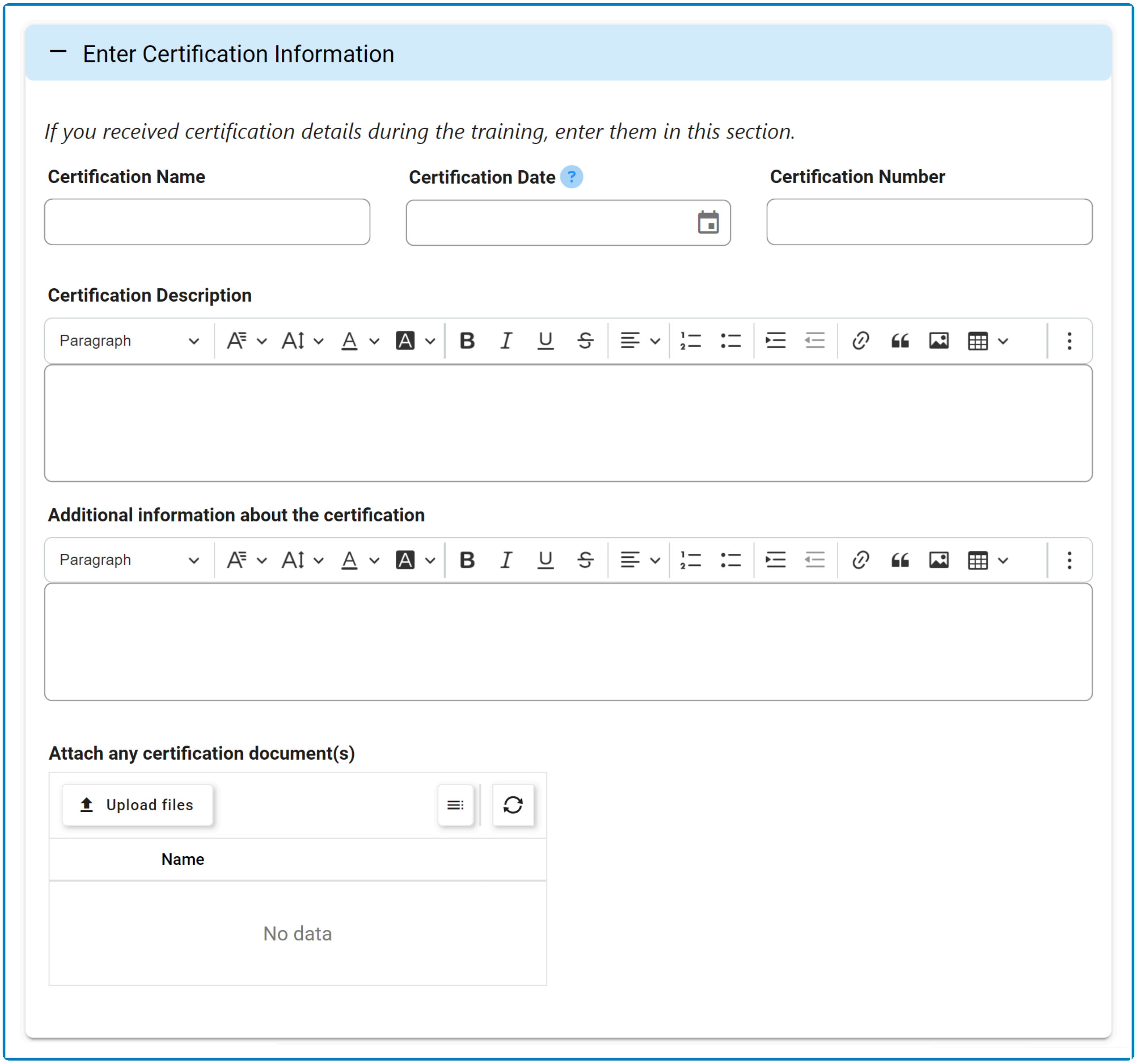
- ***Score Obtained on the External Assessment:*** This is a numeric field that allows users to input the score they achieved on the external assessment.
- ***Upload Proof of Completion of External Assessment:*** This is an attachment field that allows users to upload documented proof of their completion of the external assessment.

To access the external assessment, simply click on the provided hyperlink.

If a passing score has been set for the post-training assessment, upon completion of the training, the system will automatically check the obtained score. If users receive a score lower than the required minimum, re-training will be automatically triggered.

18.1.1.5. Enter Certification Information

In this accordion, users can record the certification details acquired during the training.

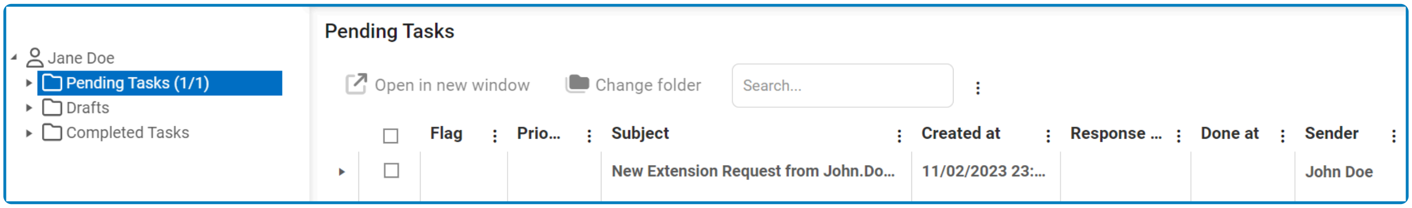


1. ***Certification Name:*** This is a text field that allows users to input the name of the certification.
2. ***Certification Date:*** This is a date picker that allows users to input/select the date of certification.
3. ***Certification Number:*** This is a text field that allows users to input the certification number.
4. ***Certification Description:*** This is a rich text field that allows users to provide a description of the certification.
5. ***Additional Information About the Certification:*** This is a rich text field that allows users to input other certification details.
6. ***Attach Any Certification Documents:*** This is an attachment that allows users to upload relevant

certification documents.

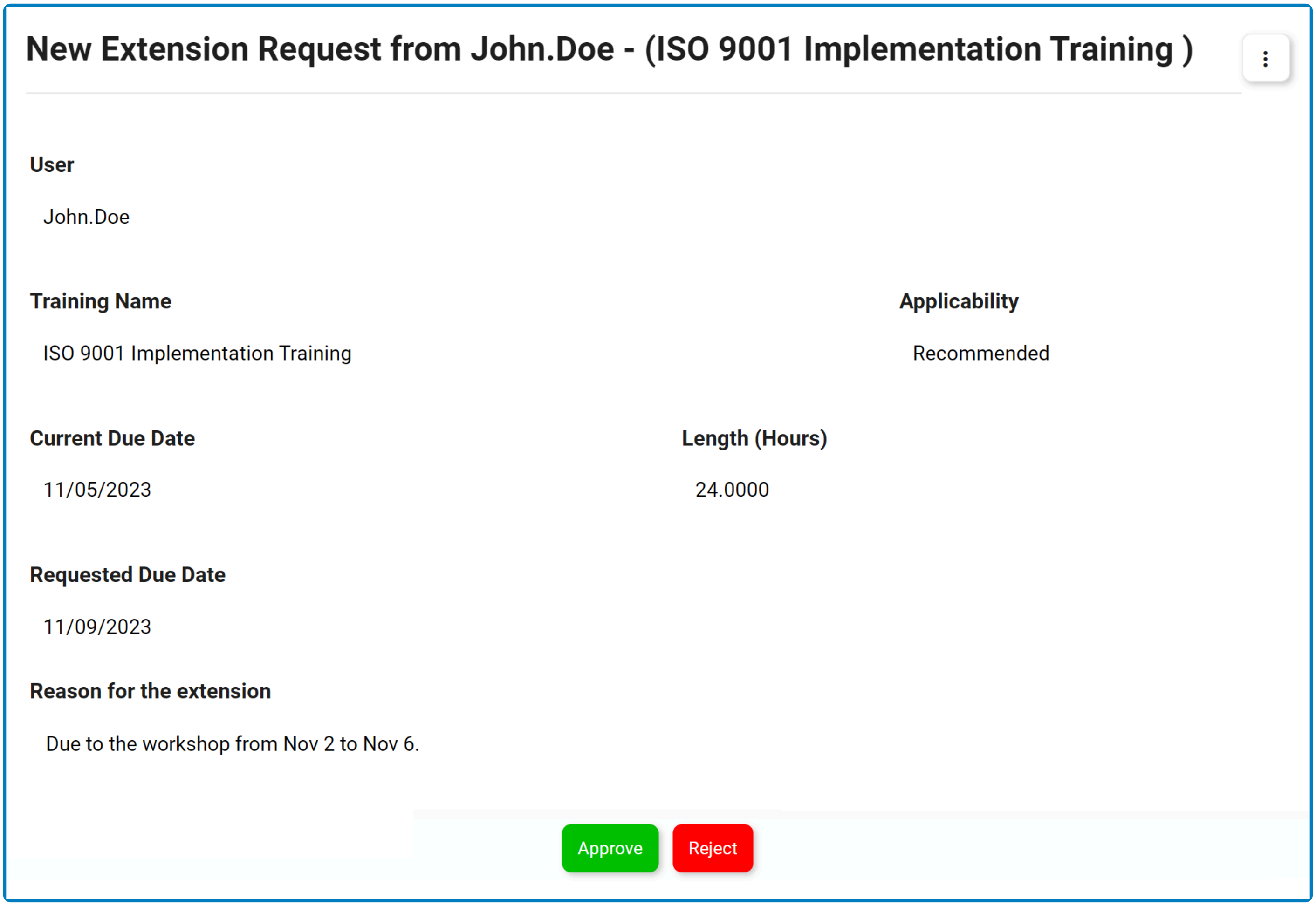
18.1.1.6. New Extension Request

Once the extension request has been sent, the assigned manager(s) will receive a notification in their **Pending Tasks** informing them of the matter.



They will also receive an email with the details.

Clicking either on the subject in **Pending Tasks** or on the link in the email should direct the manager to the New Extension Request form.


New Extension Request from John.Doe - (ISO 9001 Implementation Training)

User

John.Doe

Training Name

ISO 9001 Implementation Training

Applicability

Recommended

Current Due Date

11/05/2023

Length (Hours)

24.0000

Requested Due Date

11/09/2023

Reason for the extension

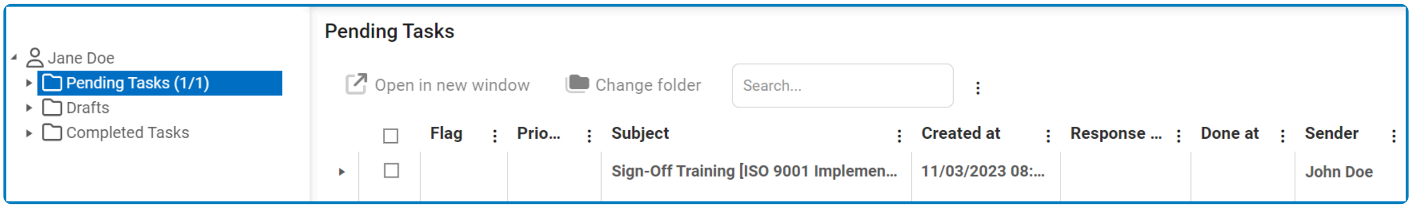
Due to the workshop from Nov 2 to Nov 6.

Approve Reject

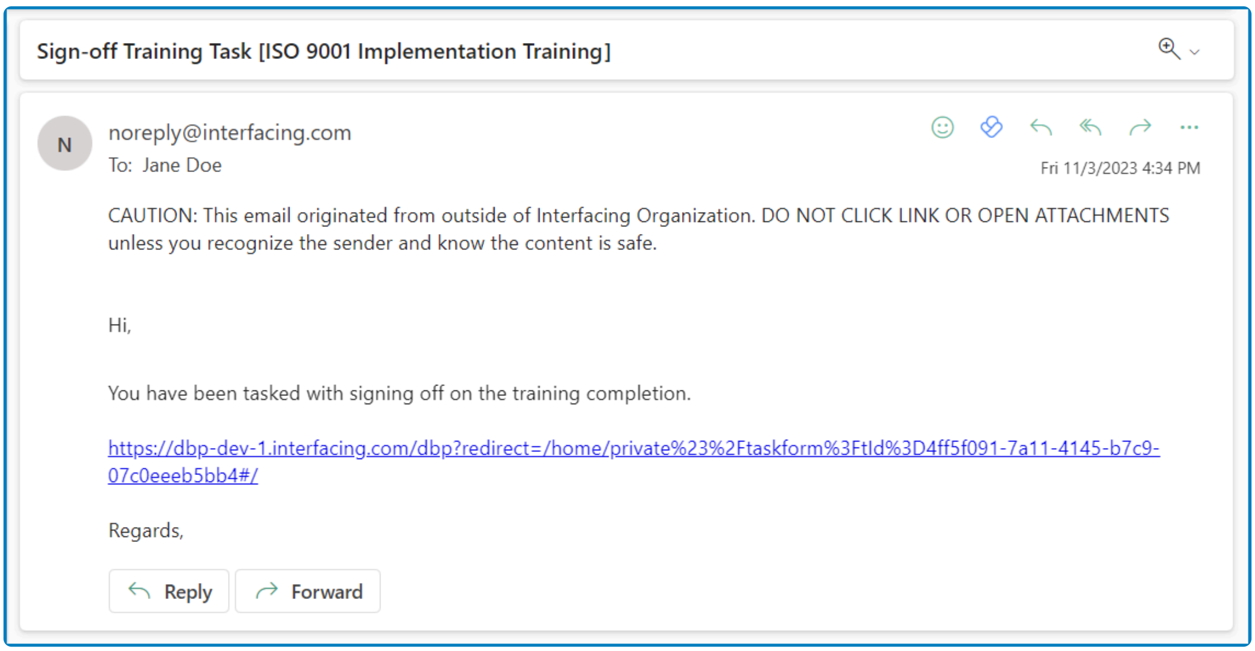
1. ***Reject:*** This button allows the manager to reject the request.
    - If selected, the user will receive an email informing them of the rejection and the due date will stay the same on the Execute Training form.
2. ***Approve:*** This button allows the manager to approve the request.
    - If selected, the user will receive an email informing them of the approval and the new due date will be displayed on the Execute Training form.

18.1.2. Sign Off Training Completion

Once a trainee has completed the Execute Training task, the training manager will receive a notification in their **Pending Tasks** prompting them to sign-off on the training completion.



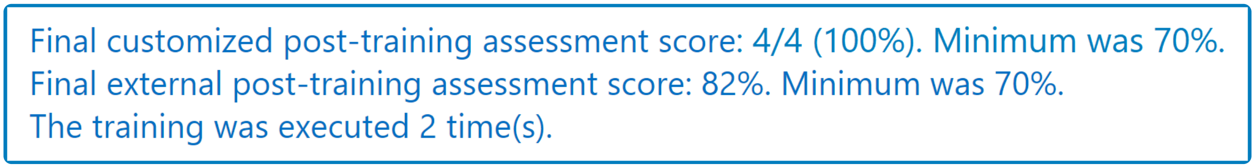
They will also receive an email notification informing them of the assigned task.



Clicking on either the subject in **Pending Tasks** or the link in the email will direct the manager to the Sign Off Training Completion task. This form is largely a duplicate of the Execute Training task, with the exception of a few details. In this form, the manager cannot make any modifications. They can, however, view trainee responses and download any attached files. Listed below are the other primary differences between the forms:

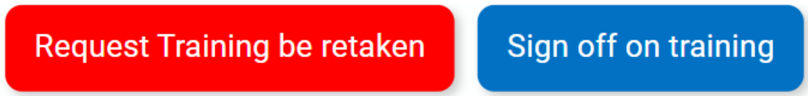
1. **Score**

If a post-training assessment has been applied to the training, the manager will be provided with the assessment results.

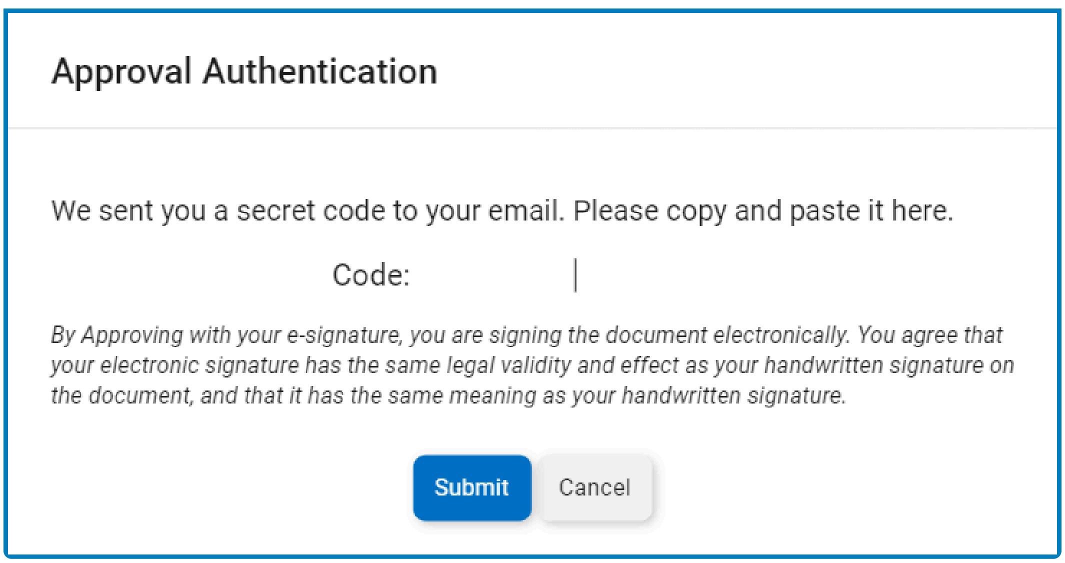


If any re-trainings were required during the process, they will also be indicated in the corresponding tabs.

2. **Request Training To Be Retaken / Sign Off on the Training**



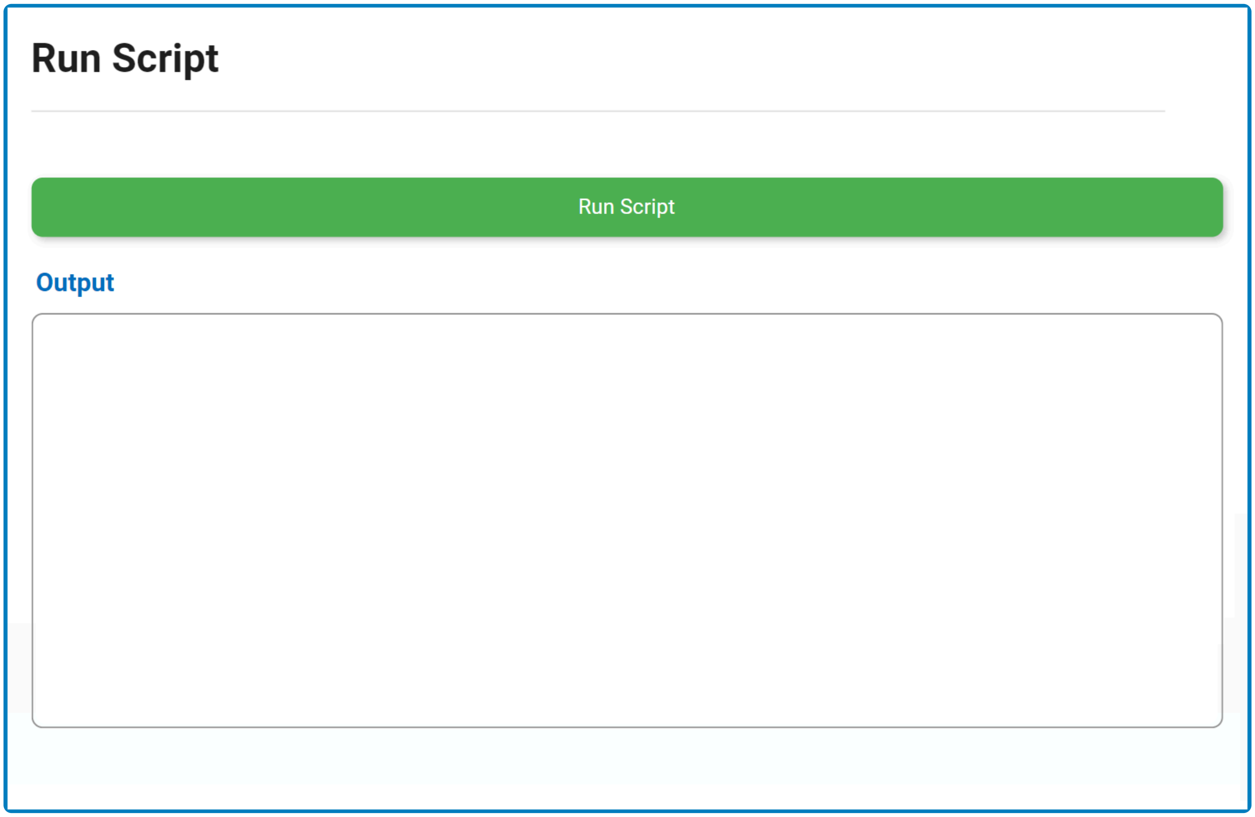
- ***Request Training To Be Retaken:*** This button allows users to initiate a retry of the training.
- ***Sign Off on the Training:*** This button allows users to sign-off on the training and mark it as complete.
  - If selected, a pop-up window will appear prompting users to authenticate their signature with a unique code.



Users will receive this code via email. Once the code is entered, the event will be successfully signed off, and the task will be marked as completed. Users can then access their signature by viewing a PDF template of the form.

18.2. Run Script

This module is used purely for trial and demonstration purposes. It is an alternative scheduler in non-production environments which, if manually instigated, can trigger the trainings. Representative of the sequence of instructions running through the system 24/7, this section allows users to simulate a script spontaneously. It simulates as if the script were to run daily.



1. ***Run Script:*** This button allows users to simulate a script on the fly.
    - Once selected, the program will check through all the current trainings available and assign a training to anyone who has not yet received it.
2. ***Output:*** This field is automatically populated with the results of the simulation once the **Run Script** button has been selected.