

Using the INTRAC Record-keeping System and Training



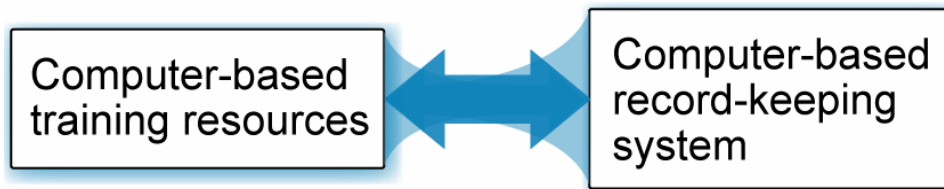
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Introduction

The **Intrac Training System** consists of computer-based training resources linked to the Intrac Record-keeping System. When users successfully complete on-screen training, their training record is automatically updated in the Record-keeping System.



If you are using our hosted system, use Internet Explorer to go to the following web address:
<http://cbt.eclipsetrainingsolutions.com/ClientSites>

Important: If you are not sure, check your security settings — select “Click Here For Technical Support” and follow the instructions.

Once you have followed the link as above, you will need to log into the system:

- Client Id: companyname
- Password: *****

At the next screen, select your company and name from the drop-down list and enter your password.



Intrac Record-keeping System

The Intrac Record-keeping System is designed to record and keep track of the training history of employees and/or contractors.

There are two security levels for the record-keeping system. The top level is for Administrators — personnel who will manage all aspects of the Intrac training records and reporting requirements.

Administrators can add, edit and delete courses, training, employees, contractors, administrators, and supervisors. They can also enter system variables to make them specific to your site.

Normally, access at this level is restricted to two or three individuals to protect the security and integrity of the system.

The functions that are accessible by an Administrator are shown here:



The second security level is for Supervisors. Personnel designated as “Supervisor” by the Intrac Administrator can view employee information, view training records, add training and generate reports.

Functions of the main menu accessible by a Supervisor are shown here:




Important

Supervisors can access the database to view records and create/print reports, as well as record training in an employee’s record:

- ❖ Information can only be entered for existing courses. If a course you wish to enter data for is not in the drop-down list, contact an Administrator.




Only Administrators can add, edit or delete information from the database (employee information, courses and course types, etc.). This manual is geared towards the Administrator. Supervisors should refer to sections applicable to the menu items displayed above.

To configure the Record-keeping System:

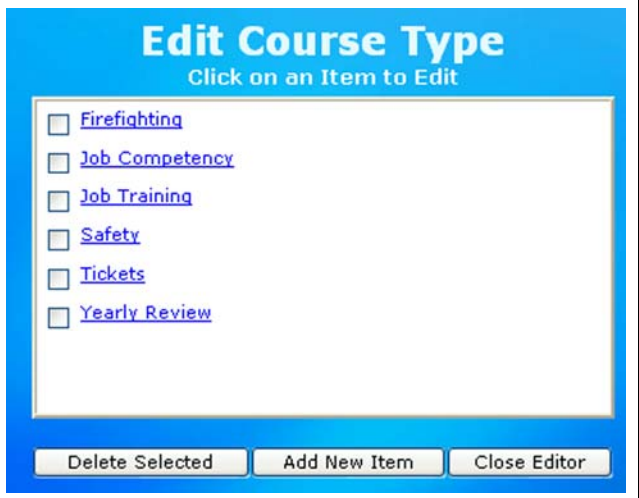
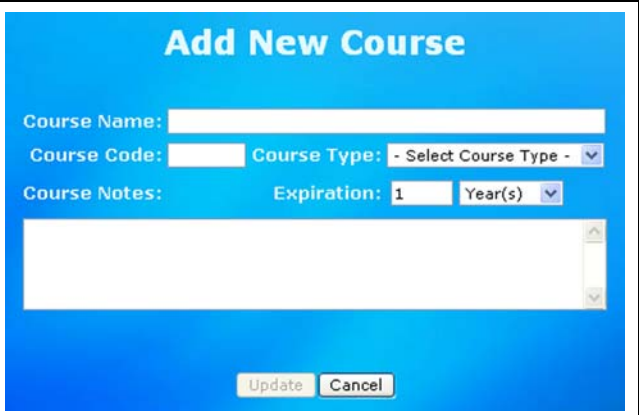
<ul style="list-style-type: none"> Click on the Configure System button on the Main Menu. 	
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Many of the fields are completed by making drop-down selections that are created from the System Configuration Menu. The more thorough you are with setting up the drop-down options, the easier it will be to filter and access required training information.



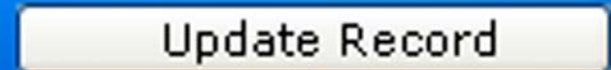
Making entries in the Configuration menu is basically the same for all options.

<ul style="list-style-type: none"> Click on a menu item to open the edit window. 	
<ul style="list-style-type: none"> Use Company Setup to create an employee sorting drop-down for contractors (or other divisions of your company) that you will be recording training for. <p>Important: Do not delete the Eclipse Training Solutions entry — it is required for troubleshooting purposes.</p>	
<ul style="list-style-type: none"> Area and Shift are selections that can be used to group employees in any way useful for creating reports or viewing records. 	


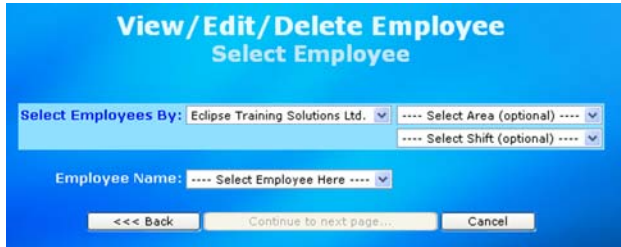

To configure the Record-keeping System (cont.):

<ul style="list-style-type: none"> Use Course Type to create selections for grouping courses to meet your sorting requirements. 	
<ul style="list-style-type: none"> Use Course Setup to enter all courses for which you will require to track training. 	
<ul style="list-style-type: none"> When you select Add New Item leave the “course code” field blank — the code is used for automatic recording of on-line training and is for Eclipse Training Solutions use only. Select the correct expiration time to accurately track re-training requirements. 	

To add a new user/employee:

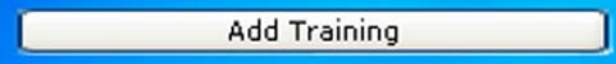

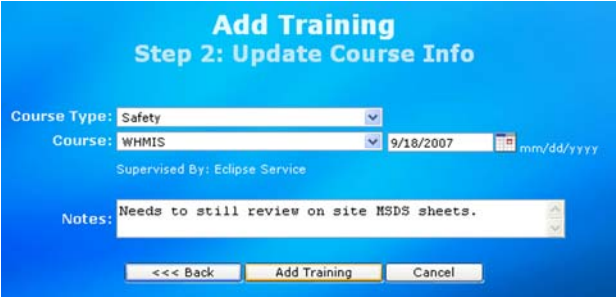

<ul style="list-style-type: none"> Click on the Add New Employee button on the Main Menu. 	
<ul style="list-style-type: none"> Complete the form selecting from drop-downs where applicable: <ul style="list-style-type: none"> The following fields are mandatory entries: <ul style="list-style-type: none"> Employee Number First Name Last Name Password Each employee number must be unique. Each password must be unique. Employee numbers and passwords can consist of any combination of numbers and letters. 	
<ul style="list-style-type: none"> Click on the Update Record button to add the new user/employee to the system. 	

View, edit, or delete employee/user information:

<ul style="list-style-type: none"> Click on the View/Edit/Delete Employee button on the Main Menu. 	
<ul style="list-style-type: none"> Select the employee by selecting his/her name from the <i>Employee Name</i> drop-down list: <ul style="list-style-type: none"> Filter employee list by clicking on the <i>Select Area</i> or <i>Select Shift</i> options. Click on Continue to next page... 	
<ul style="list-style-type: none"> This screen will show you the employee's current information. You have the options from this screen to view current training records for the employee, delete the employee from the system, or edit any of the information displayed here. Click on Finish to return to the main menu. 	

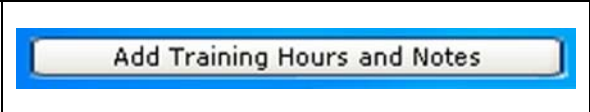


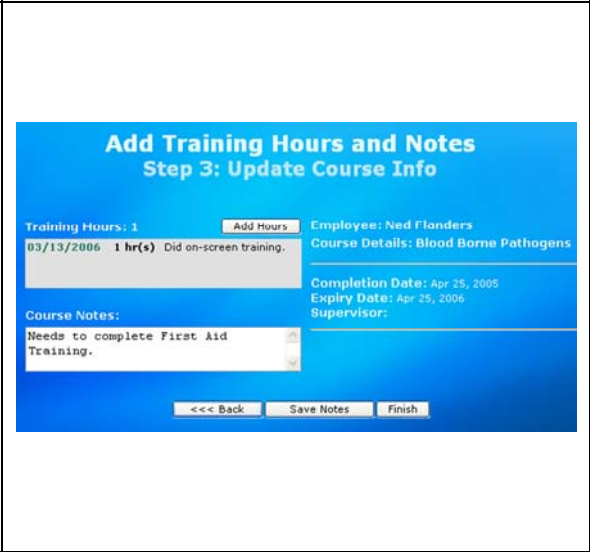
Here a Supervisor can view the training records for the individual, and qualifications entered, but cannot edit the employee data. If corrections to the record are necessary, an Administrator can make the changes.

Manually add training to an employee record:

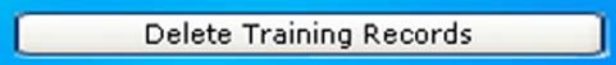



<ul style="list-style-type: none"> Click on the Add Training button on the Main Menu. 	
<ul style="list-style-type: none"> Select the employee by selecting his/her name from the <i>Employee Name</i> list: <ul style="list-style-type: none"> Filter employee list by clicking on the <i>Select Area</i> or <i>Select Shift</i> options. Select more than one name using one of the following options: <ul style="list-style-type: none"> Hold down the “Shift” key to select sequential records Hold down the “Ctrl” key to select specific records Press “Ctrl A” to select all names in the list Click on Continue to next page... 	
<ul style="list-style-type: none"> Select the <i>Course Type</i> to filter the courses for a specific topic. Select the course name from the <i>Select Course</i> drop-down list. Enter the date the training was completed: <ul style="list-style-type: none"> Enter date in mm/dd/yyyy format, or Click on the calendar icon to view the calendar and click on the appropriate date Add notes relevant to the course (<i>optional</i>) 	
<ul style="list-style-type: none"> Click on the Add Training button to enter the training to the system and be returned to the main menu. <p>Important: Once added, training can only be edited individually (not batched) — check that your entries are correct before adding.</p>	

Remember: Employee records are updated automatically when users complete the computer-based evaluations that have been linked to the system.

Add training hours and notes to an employee record:

<ul style="list-style-type: none"> Click on the Add Training Hours and Notes button on the Main Menu. 																															
<ul style="list-style-type: none"> Select the employee by selecting his/her name from the <i>Employee Name</i> drop-down list: <ul style="list-style-type: none"> Filter employee list by clicking on the <i>Select Area or Select Shift</i> options. Click on Continue to next page... 																															
<ul style="list-style-type: none"> Select the <i>Course Type</i> to filter the courses for a specific topic. Click on the course name from the list displayed. 	 <table border="1"> <thead> <tr> <th>Course Name</th> <th>Date</th> <th>User</th> </tr> </thead> <tbody> <tr><td>#1 Edger (Level 1)</td><td>Jun 23, 2006</td><td>Guest User</td></tr> <tr><td>#1 Edger (Level 3)</td><td>Sep 28, 2006</td><td>Guest User</td></tr> <tr><td>Blood Borne Pathogens</td><td>Apr 25, 2005</td><td></td></tr> <tr><td>Edger Competent</td><td>May 30, 2007</td><td>Guest User</td></tr> <tr><td>Hand Safety</td><td>Feb 14, 2007</td><td>Guest User</td></tr> <tr><td>Junior First Aid</td><td>Feb 10, 2007</td><td>Eclipse Service</td></tr> <tr><td>Stick Tender (Level 1)</td><td>Apr 4, 2005</td><td></td></tr> <tr><td>Stick Tender (Yearly Review)</td><td>Apr 4, 2005</td><td></td></tr> <tr><td>WHMIS</td><td>Sep 13, 2007</td><td>Eclipse Service</td></tr> </tbody> </table>	Course Name	Date	User	#1 Edger (Level 1)	Jun 23, 2006	Guest User	#1 Edger (Level 3)	Sep 28, 2006	Guest User	Blood Borne Pathogens	Apr 25, 2005		Edger Competent	May 30, 2007	Guest User	Hand Safety	Feb 14, 2007	Guest User	Junior First Aid	Feb 10, 2007	Eclipse Service	Stick Tender (Level 1)	Apr 4, 2005		Stick Tender (Yearly Review)	Apr 4, 2005		WHMIS	Sep 13, 2007	Eclipse Service
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<ul style="list-style-type: none"> Click on the Add Hours button to record training hours: <ul style="list-style-type: none"> If you need to edit an entry, click on the date (<i>e.g.</i> <u>3/13/2006</u>) to bring up the entry and make the necessary correction – remember to Save Record details specific to the training in the course notes box (<i>optional</i>): <ul style="list-style-type: none"> Remember to click on the Save Notes button if you make any changes to the course notes Click on Finish to return to the main menu. 	 <p>Training Hours: 1 Add Hours Employee: Ned Flanders 03/13/2006 1 hr(s) Did on-screen training. Course Details: Blood Borne Pathogens Completion Date: Apr 25, 2005 Expiry Date: Apr 25, 2006 Supervisor: Course Notes: Needs to complete First Aid Training.</p>																														

To delete training records:



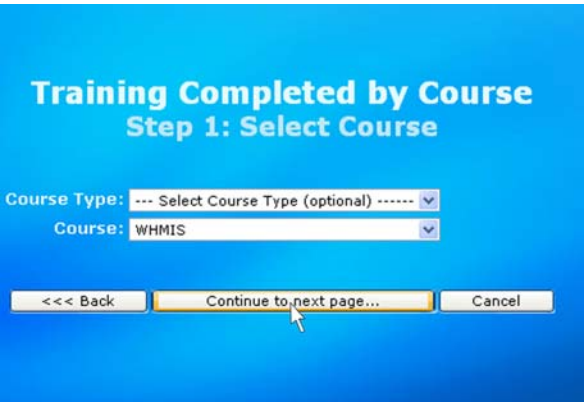
<ul style="list-style-type: none"> Click on the Delete Training Records button on the Main Menu. 	
<ul style="list-style-type: none"> Select the employee by selecting his/her name from the <i>Select Employees By</i> drop-down list: <ul style="list-style-type: none"> Filter employee list by clicking on the <i>Select Area or Select Shift</i> options. Click on Continue to next page... 	
<ul style="list-style-type: none"> To delete any of the training that is displayed in the list, click on the trash can icon  beside the course name. Click on Finish to return to the main menu 	

Create and print a report:

There are nine reports available in the system:

- **Employee Training** – generates a list of the **most recent** training taken by selected employee(s).
- **Training History** – generates a list of **all** training taken by selected employee(s).
- **Training Completed by Course** – generates a list of employees (as selected) who have completed training in a selected course.
- **Expired Training** – generates a list of training that is expired for selected employees for a selected course(s).
- **Training Due to Expire in 30 Days** – generates a list of training that is due to expire in 30 days for selected employee(s) for selected course(s).
- **Employees Qualified for Job** – generates a list of employees who are qualified for a selected job.
- **Jobs Qualified for by Employee** – generates a list of qualifications for selected employee(s).
- **Employee List** – generates a list of employees for a selected company.
- **Course List** – generates a list of courses and course details in each category in the system.

In this example you will generate a list of employees that have completed training in a particular course.

<ul style="list-style-type: none"> • Click on the Generate Reports button on the main menu. 	
<ul style="list-style-type: none"> • Select a report from the <i>Available Reports</i> drop-down. • Click on Continue to next page... 	
<ul style="list-style-type: none"> • Select <i>Course Type</i> to filter the courses for a specific category: <ul style="list-style-type: none"> – Select the course name from the list displayed. • Click on Continue to next page ... 	

Create and print a report (cont.):

- Select the employee by selecting his/her name from the *Employee Name* list:
 - Filter employee list by clicking on the *Select Area* or *Select Shift* options. Select more than one name using one of the following options:
 - Hold-down the “Shift” key to select sequential records.
 - Hold-down the “Ctrl” key to select specific records.
 - Press “Ctrl A” to select all names in the list.
- Click on **Continue to next page ...**



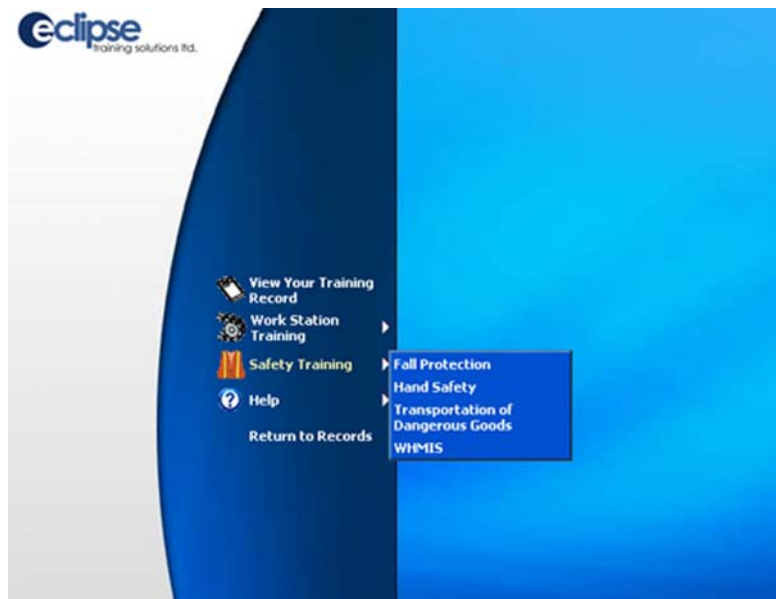
- Choose how you would like the report to be sorted.
- Click on **Run Report.**



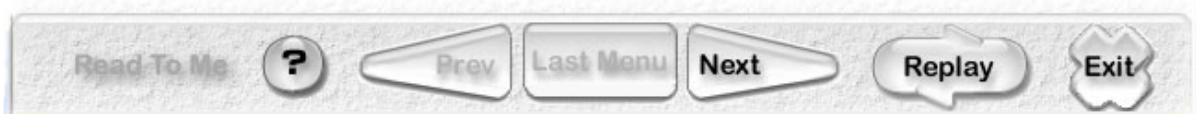
Using the Intrac Training System

The training system is designed to work as follows:

- Trainee uses their password to enter the system. Entering a password automatically links the user to their employee record in the record-keeping database.
- Once the password is entered and validated, a menu similar to the one below is shown.








- When a module has been launched from the main menu, the trainee proceeds through the module using simple navigation buttons on the bottom of the screen.



- When the trainee completes the on-screen knowledge evaluation:
 - Their training record is automatically updated in the **Intrac Record-keeping System**.
 - An expiry/review date is automatically set.
- Trainee/trainer and/or supervisor complete the on-job training cycle and training checklists.
- Completion of the on-job training checklist is manually entered **by the supervisor**.
- Supervisor uses the Record-keeping System to ensure all crew members have received initial and annual training as required.

To Orient New Users:

<ul style="list-style-type: none"> • Have the individual enter the system by selecting company and name from the dropdown, and entering their password. 	
<ul style="list-style-type: none"> • Demonstrate the View Your Own Records feature. Selecting this option from the menu provides the user with their own training record, which can be printed out if desired. 	
<ul style="list-style-type: none"> • Demonstrate the use of the help button. Clicking on the help button provides detailed information on using the resources. <ul style="list-style-type: none"> – Demonstrate how to print out the current page in order to mark edits or changes to the information on that page. 	
<ul style="list-style-type: none"> • Demonstrate how to print out on-job training checklists and other printable resources from a module's main menu. 	
<ul style="list-style-type: none"> • Review training requirements with the trainee: <ul style="list-style-type: none"> – Complete the on-screen resources – Print off the on-job training checklists as applicable. – Complete the job-training cycle. 	

Important

When completing the training modules, ensure you use the buttons provided to navigate through the programs and to exit the programs — **do not use the “X” on the top right to close windows or exit programs, and do not use the internet toolbar “forward” or “back” buttons.**

On some machines, a small cache box will sometimes appear partially behind or behind the training screen — **do not attempt to close this window**; it will cause the program to crash.