iTacit Quick Reference Guide

Training & Education Module

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Introduction

Welcome to your Training Site powered by iTacit. This guide is designed to walk you through common Set-Up and Maintenance activities in your top left-hand **Menu**.

For more information regarding regular Dashboard Tools and activities, please refer to the *Welcome iCourse for Employees or Managers*, assigned to you in your "My Training" dashboard tool and available in the Training Catalog.

Infrastructure Requirements

To provide a great customer experience, iTacit has some basic technology requirements and recommendations for people using it. We do our best to provide support for popular computers, laptops, tablets, and smartphones, using popular browsers.

If you have any issues with your device or browser, check our recommendations below, or contact your iTacit representative or the helpdesk@itacit.com team.

Internet Browsers

- Microsoft Internet Explorer (IE) 9 (or newer)
- Mozilla Firefox 4 (or newer)
- Safari 5.1 (or newer)
- Google Chrome 10 (and above)

Plug-Ins

- Adobe Acrobat Reader

Adobe Flash (Supported Media File type)

Adobe Flash support has progressively declined in recent years making it incompatible with most popular and modern browsers. Flash players are currently not supported for iOS and Android devices on all modern browser versions.

It is still possible to consume flash-based media on desktops and laptops primarily using Chrome. If using Internet Explorer, an IE8 compatibility mode is currently enforced in iTacit in order to enable compatibility.

iTacit recommends avoiding the consumption of flash based media going forward due to the diminishing level of support.

Media Recommendations

Looking to spice up your training courses with Media? Sending an attachment to a message to simplify your
Communication? Great! For best results in image quality and playback, please take a look at the guidelines below:

Images:

Formats	.JPG and .PNG	
Resolution	72 dpi	
Size Recommendations (in pixels)		
	Optimum	**Maximum**
Employee Avatars (headshots)	64x64	256x256
Logos for Training Courses, News Articles	256x256	512x512
Images for course content	512x512	1024x768
Images for course content (which may be zoomed to full-screen	800x600	1920x1080

Packaged Courses:

Formats:

- .AICC
- SCORM 1.2
- SCORM 2004
- Tin Can

HTML formats can also be used to import course content into the iTacit iCourse area

Video:

Format	.MP4, MOV, and .GIF
Codec (plug-ins)	H.264, AAC
Maximum dimension	1280 x 720 (720p) 720p is the recommended maximum size. If full screen video playback of a video is not anticipated, then a size should be considered.
File Size	Video files exceeding 20 MB should be assessed to see if they can be shortened.
Video Length	Should be limited to 2 minutes or less, to prevent excessive file sizes. Can your video be chunked/broken into chapters or sections? Learners will also benefit!
Processing	Video is bandwidth-intensive. Videos should be processed through a compression utility (such as Vimeo, YouTube or similar), to ensure that it is as lightweight as possible. Direct upload of raw-captured video should be avoided.

Attachments:

Format	PDF Document Files (Optimal)
iTacit allows the uploading of other document types. Document types, other and Adobe Acrobat, require the existence of software on the viewing device that is capable of opening the uploaded document type. For example, if you upload a Microsoft Word (.doc) document, the viewing user must have Microsoft Word installed on their device to view that document.	
Maximum Size Recommendations (in MB)	
My Messages	10 MB due to mail server processing
iCourse Reference Documents, Training Catalog Item Documents, Employee Documents	20MB

TRAINING & EDUCATION – Set-Up

Create an iCourse

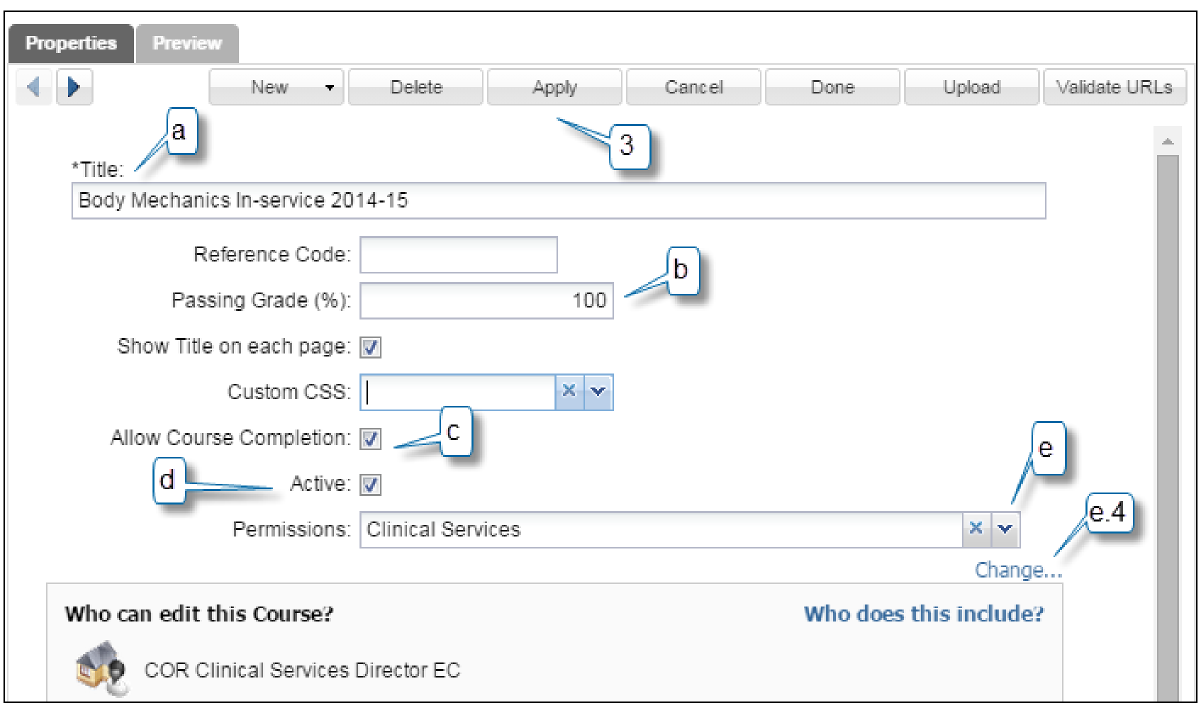
iCourses are a great way to deliver online training through iTacit. Course material can be developed to include existing PowerPoint documents, policies, reference material, audio and video.

1. Select **Menu** > **Training & Education** > **iCourses**.

2. In the *iCourses* screen select **New**.

    a. Enter a **Title** for the iCourse.
    b. Set the **Passing Grade (%).**
    c. Place a checkmark in the box by **Allow Course Completion** to ensure employees are able to complete the course.
    d. Place a checkmark in the box by **Active** to ensure the course is available for use.
    e. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.
        i. To set permissions without a predetermined permission group select **Change**.
            1. Search for the desired **Group**, **Business Unit**, **Job Classification** and/or **Role**.
            2. Select **Add** to be add your selection to the desired section.
            3. Select **Who does this include?** to view the names of employees included in the desired section.
            4. Select **Done**.

3. Select **Apply**.



If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.

Create a New Page in your iCourse

Add new content to your course by creating a new page (section/page) or sub-component.

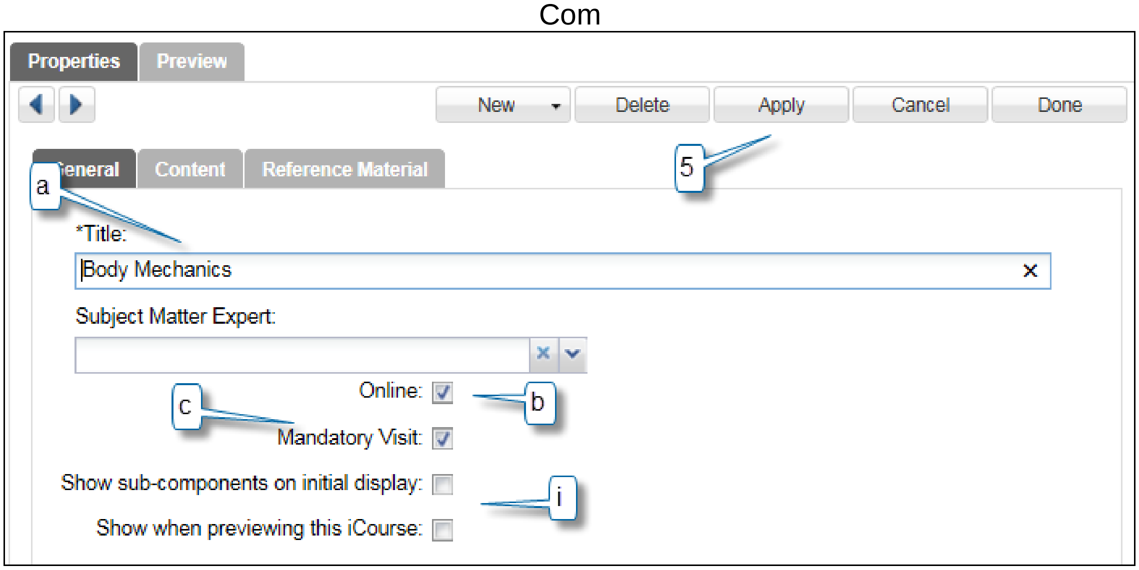
4. In your open iCourse, select **New** > **Page**.

a. Enter a **Title** for the page.
b. Place a checkmark in the box by **Online** to ensure the section is displayed when taking the iCourse. (To inactivate this section, remove the checkmark).
c. Place a checkmark in the box by **Mandatory Visit** if this section is required when taking the iCourse.

Place a checkmark in the box by **Show sub-components on initial display**, if the section has sub-components they will be visible when previewing the iCourse.

Place a checkmark in the box by **Show when previewing this iCourse**, to display this section when an employee previews the iCourse from the Training Catalog.

Com



5. Select **Apply**.

6. In the *Content* section enter the desired text for this section of the iCourse.

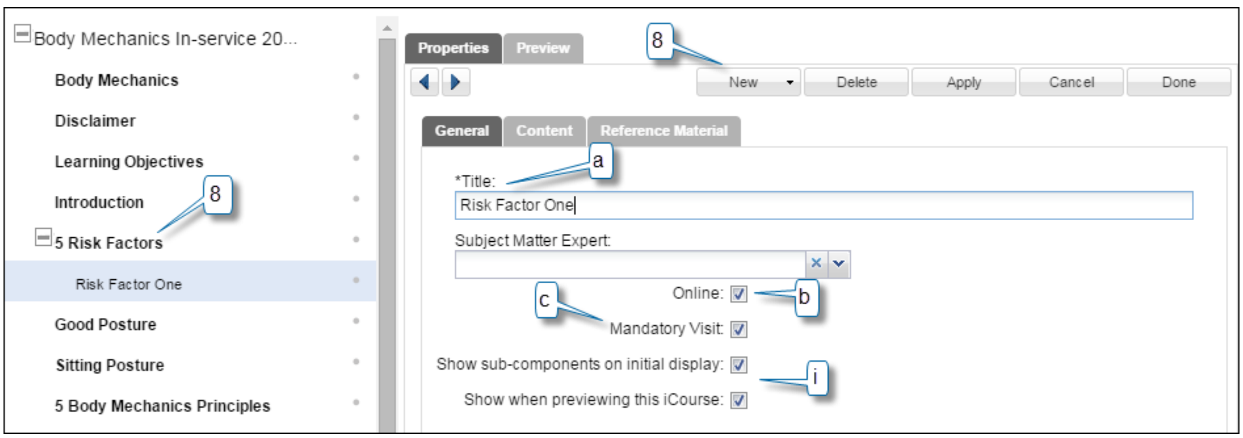
7. In the *Reference Material* section attach any associated reference material such as links or documents. Place a checkmark in the box by **Mandatory** to ensure the reference material is reviewed when taking the iCourse.

8. Using the Table of Contents panel on the side, create a sub-component by selecting the desired component, then select **New** > **Page**. The sub-component will appear below the original.

a. Enter a **Title** for the page.
b. Place a checkmark in the box by **Online** to ensure the section is displayed when taking the iCourse.
c. Place a checkmark in the box by **Mandatory Visit** if this section is required when taking the iCourse.

Place a checkmark in the box by **Show sub-components on initial display**, if the section has sub-components they will be visible when previewing the iCourse.

Place a checkmark in the box by **Show when previewing this iCourse**, to display this section when an employee previews the iCourse from the Training Catalog.

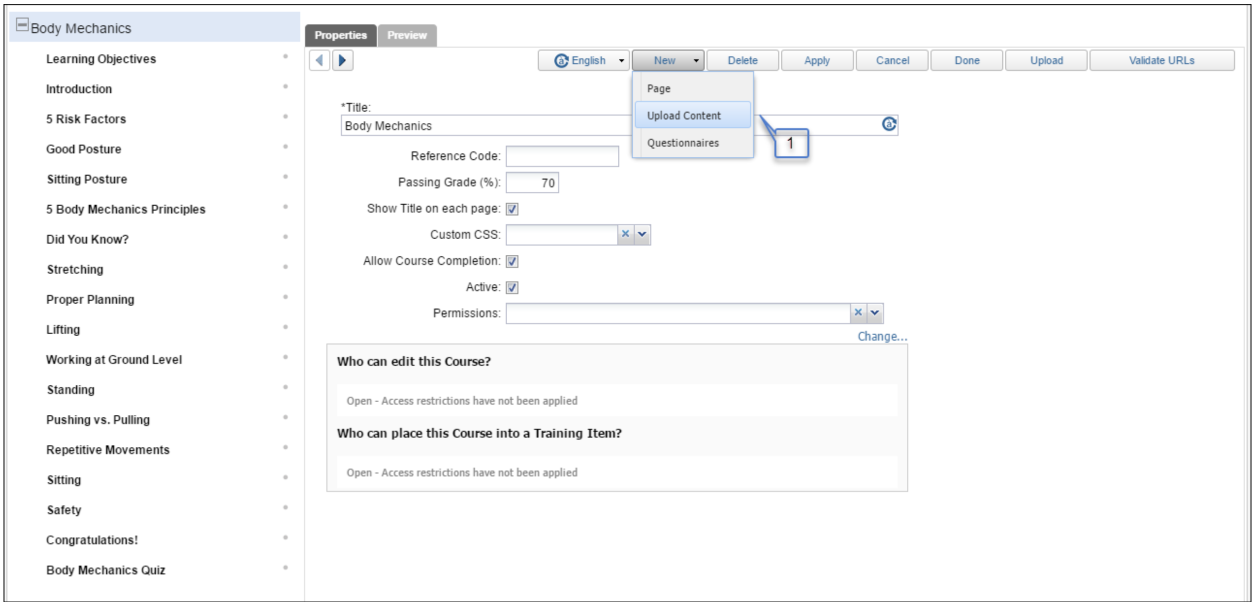


9. Select **Apply** to save.

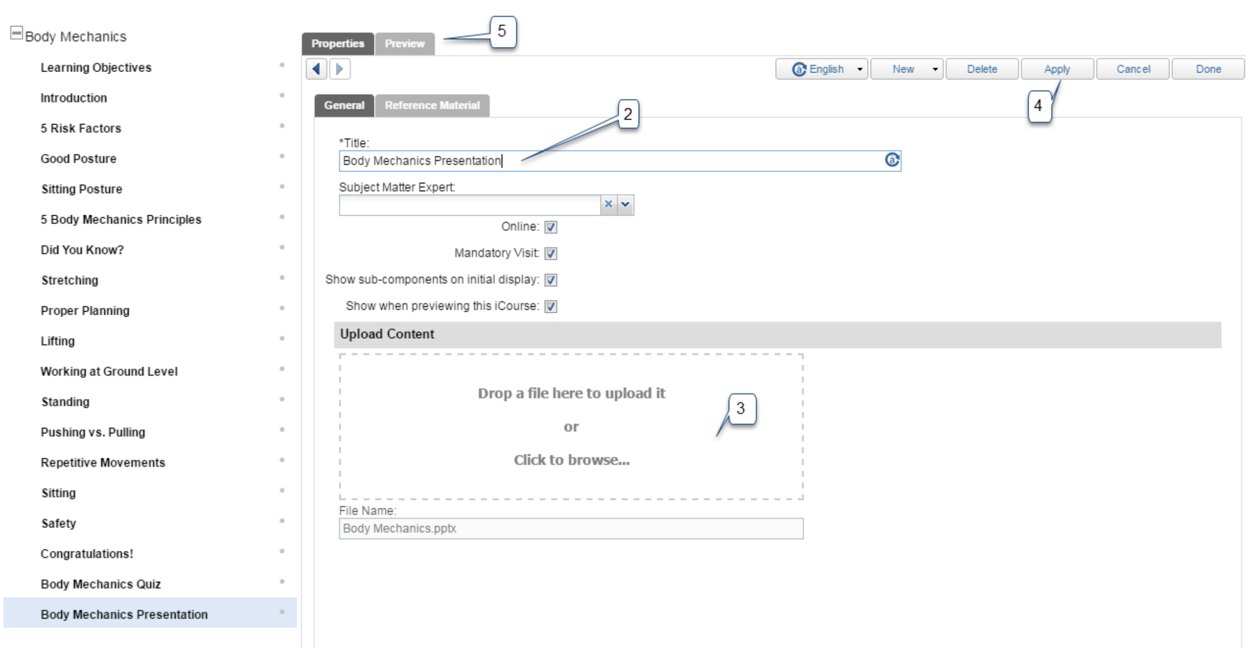
Upload Content in your iCourse

Add file content to your course by uploading Word, PowerPoint, or PDF documents to your course.

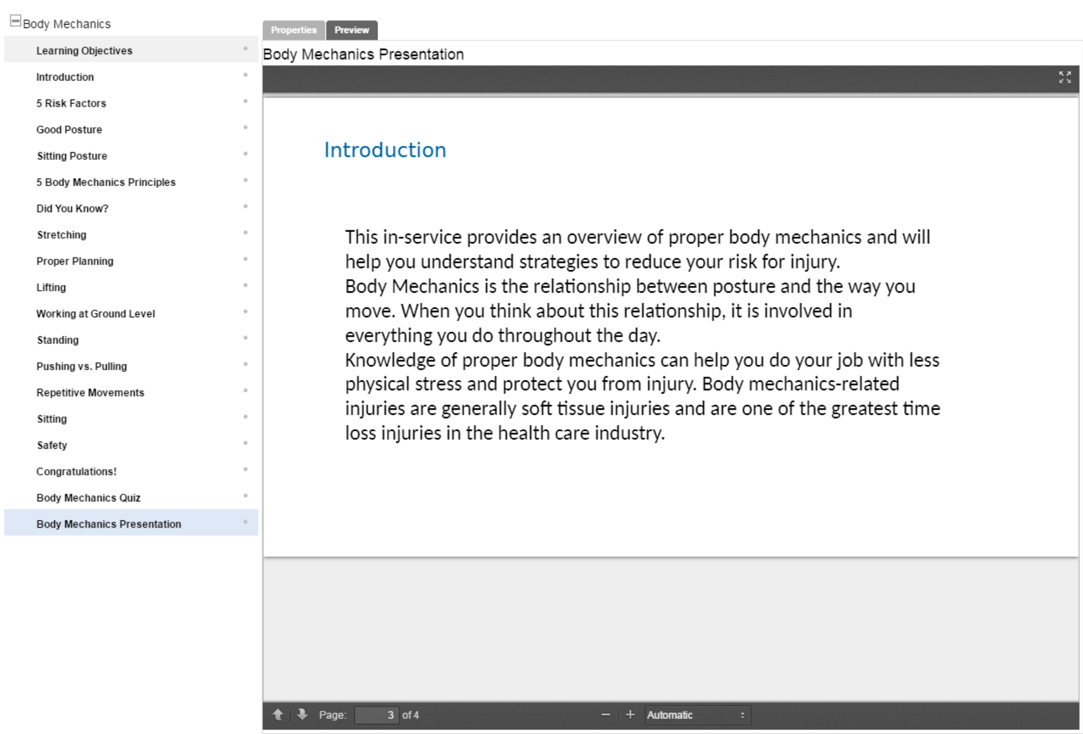
1. In your open iCourse, select **New** > **Upload Content**.



2. Insert the **Title** for the content to be uploaded.
3. Click to browse for the file on your computer OR Drag and drop the file from the location on your computer.
   a. Confirm that that file uploaded by checking the **File Name** field.
4. Click **Apply** to save the changes.



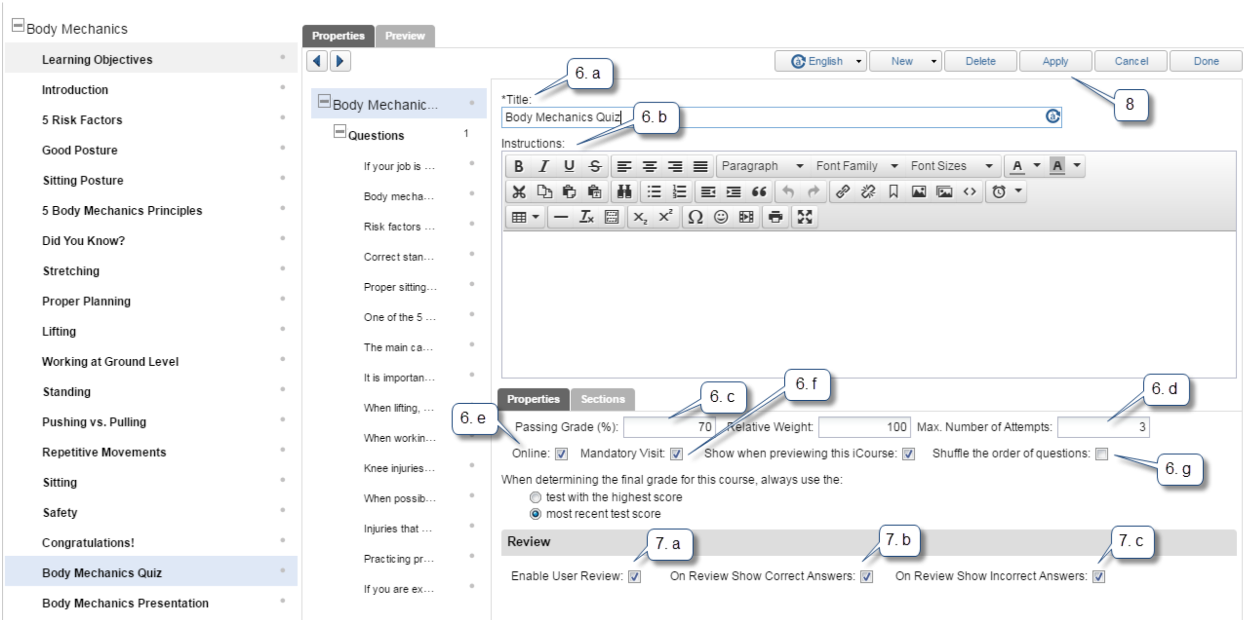
5. Select the **Preview** tab to view the content in the Document Viewer as a preview. *(See the next page for preview)*



Create a Quiz in your iCourse

6. With your iCourse open, select the title of the course and select **New** > **Questionnaires**.

a. Enter **Title** of the quiz.
b. Enter **Instructions** for taking the quiz (if applicable).
c. Enter a **Passing Grade**.
d. Enter the **Max. Number of Attempts**.
e. Place a checkmark in the box by **Online** to ensure the quiz is displayed when taking the iCourse.
f. Place a checkmark in the box by **Mandatory Visit** if the quiz is required when taking the iCourse.
g. Place a checkmark in the box by **Shuffle the order of questions** to enable the feature so each time an employee takes the quiz, the questions will be shuffled to appear in a new order.



7. In the *Review* section:

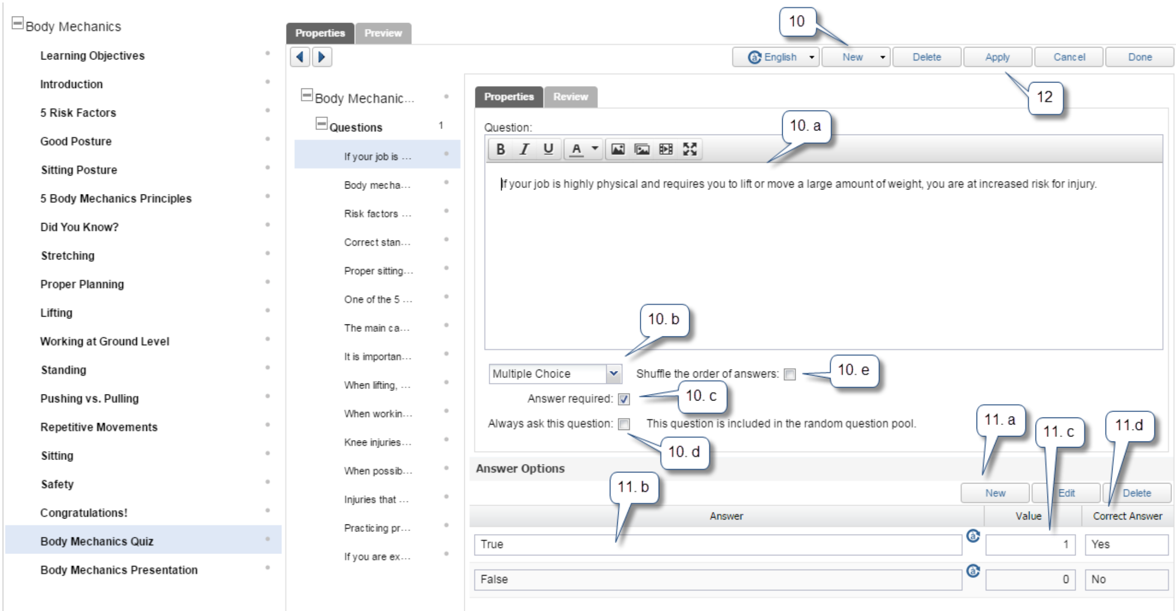
    a. Place a checkmark in the box by **Enable User Review** to enable users to review the quiz.
    b. Place a checkmark in the box by **On Review Show Correct Answers**, to display the correct answers to the questions when reviewing the quiz.
    c. Place a checkmark in the box by **On Review Show Incorrect Answers** to display the incorrect answer that was chosen.

8. Select **Apply**.
9. Create a new section in your quiz by selecting the title of the quiz. Select **New** > **Section**.

    a. Enter the **Title** of the section.

10. Add a question to the quiz section. Select the desired section on the left-hand table of contents, then select **New** > **Question**.

    a. Enter the **Question** in the text box provided.
    b. Select the dropdown arrow to select the desired question type.
    c. Place a checkmark in the box by **Answer required** to make the question mandatory.
    d. Place a checkmark in the box by **Always ask this question** to ensure the question is asked even during retakes.
    e. Place a checkmark in the box by **Shuffle the order of answers** to enable the feature so each time an employee sees this question the answers will appear in a new order.



11. Enter the **Answer Options**.

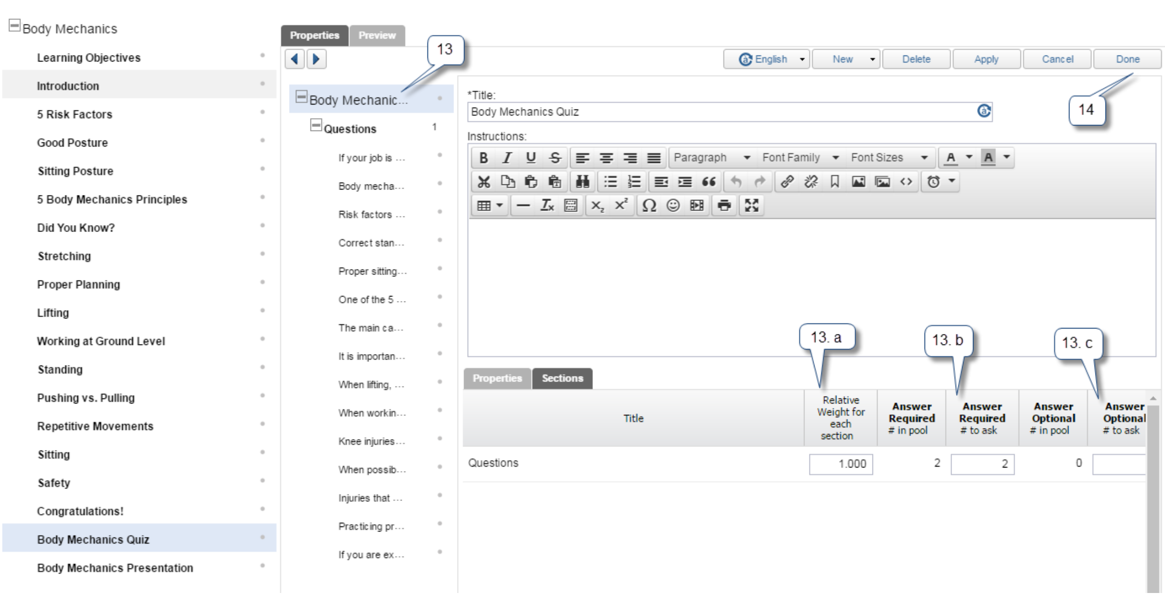
a. Select **New**.
b. Enter the **Answer** option.
c. Enter the answer's **Value**.
d. Place a checkmark by the correct answer to the question in the **Correct Answer** column.

12. Select **Apply** to save your quiz and iCourse.

Set up a Randomized Quiz in your iCourse

13. In your iCourse, select the title of the quiz and select the **Sections** tab.

a. Set the **Relative Weight for each section**.
b. Enter the number of required questions for each quiz in the **Answer Required (# to ask)** column.
c. Enter the number of optional questions for each quiz in the **Answer Optional (# to ask**) column.



If you have required questions in the pool, you can randomly select from these questions to display in a quiz. Example: From the pool of fourteen (14) required questions, randomly select ten (10).

No checkmark in the **Always ask this question** box will add the question to a pool of questions.

If you have optional questions in the pool, you can randomly select from these questions to display in a quiz. Example: From the pool optional five (5) questions, randomly select two (2).

If your quiz is one large section, your question pool will be one general pool of questions. However if your quiz is separated into a number of sections, your question pools will also be separated into sections.

Example of Relative Weight: **Comprehension quiz set** section has a relative weight of 100% and **Course feedback** section has a relative weight of 0%. The percentage can be altered to various options such as 80% / 20%. When scoring is completed, the relative weight is used to determine the employee's overall score for the quiz.

14. Select **Done** to save your quiz and associated iCourse.

Understand Scoring in a Quiz

The two question types that are scored in iTacit are multiple choice and multiple select. A multiple choice question is scored out of the highest possible score (highest weighted response option), and a multiple select question is scored out of the total possible score (all response options added together).

1) Basic scoring example:

   Example Multiple Choice: Response options – Yes = 5; No = 0 – the total possible score is 5

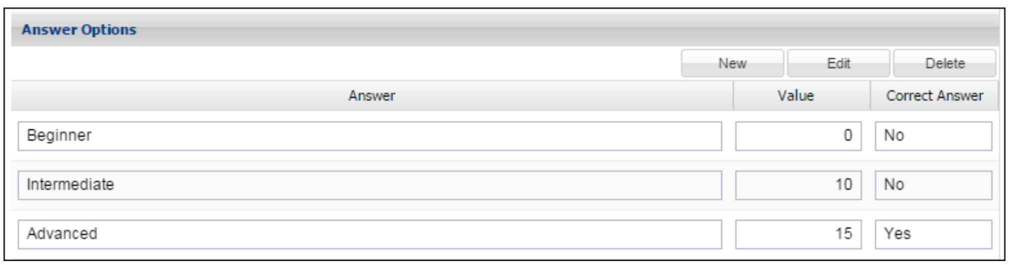
Example Multiple Select: Response options – Yes = 5; No = 5 – the total possible score is 10

Answer	Value	Correct Answer
True	0	No
False	5	Yes

2) An example for a question with 3 response options:

Example Multiple Choice: Beginner = 0; Intermediate = 10; Advanced = 15 – the total possible score of the question is 15.

Example Multiple Select: Beginner = 0; Intermediate = 10; Advanced = 25 – the total possible score of the question is 35.

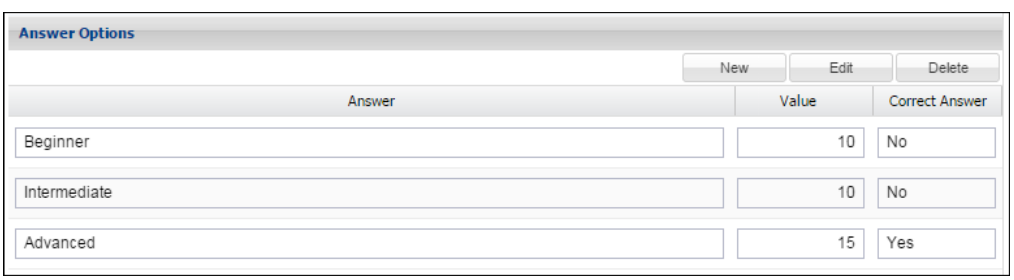


Answer	Value	Correct Answer
Beginner	0	No
Intermediate	10	No
Advanced	15	Yes

3) If you have a negative weight, this will lower the score.

Example Multiple Choice: Yes = 0; N = -5; the total possible score is 0

Example Multiple Select: Beginner = -10; Intermediate = 10; Advanced = 15 – the total possible score of the question is 15



Answer	Value	Correct Answer
Beginner	10	No
Intermediate	10	No
Advanced	15	Yes

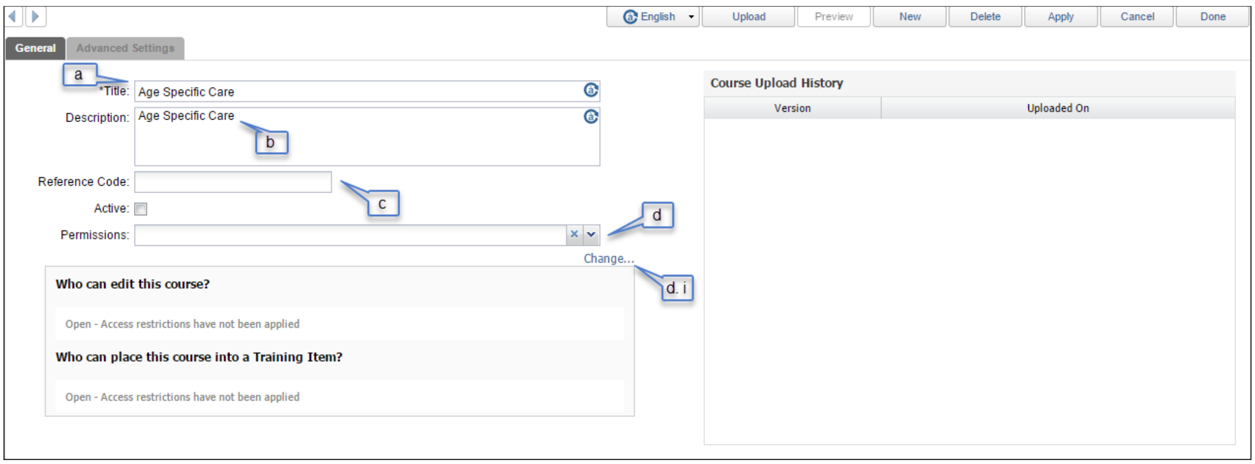
Upload a Packaged / SCORM Course

Course materials from other training content vendors can quickly be uploaded to iTacit, provided they are in an compatible format.

1. Select **Menu** > **Training & Education** > **Packaged Courses**

2. In the *Packaged Courses* screen select **New**.

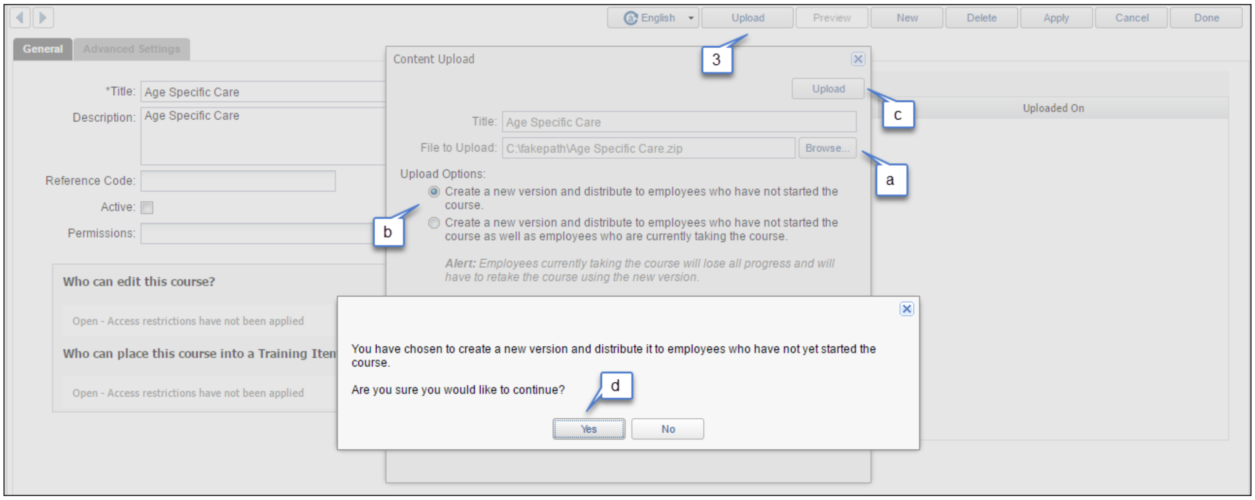
a. Enter a **Title** for the packaged course.
b. Enter a **Description** if applicable.
c. Enter a **Reference Code** if applicable.
d. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.
    i. To set permissions without a predetermined permission group select **Change**.
        1. Search for the desired **Group**, **Business Unit**, **Job Classification** and/or **Role**.
        2. Select **Add** to be add your selection to the desired section.
        3. Select **Who does this include?** to view the names of employees included in the desired section.
        4. Select **Done**.
e. Select **Apply**.



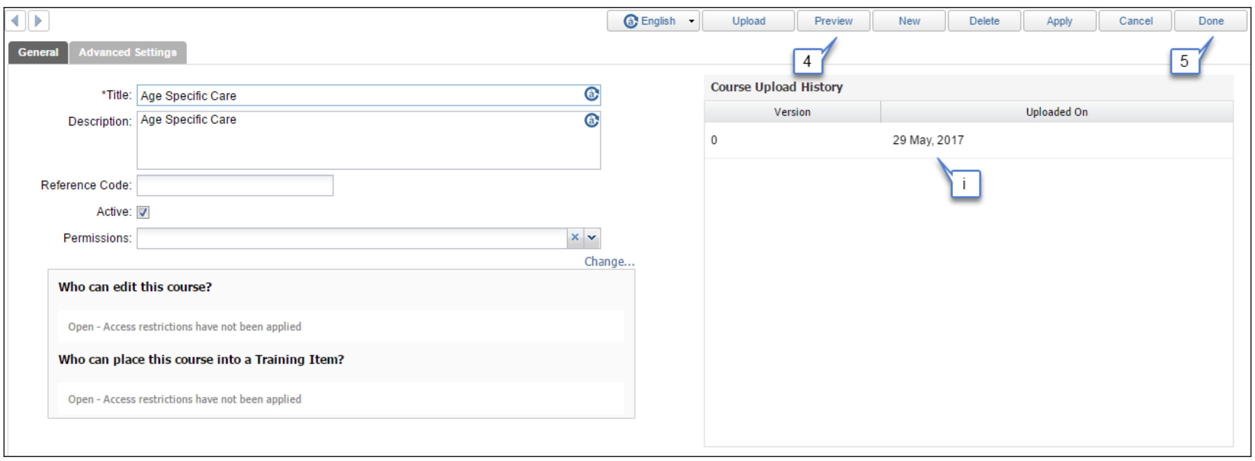
3. Select **Upload**. *(See image on next page)*

a. Select **Browse** to attach the desired course.
b. Select the desired **Upload Option**.
c. Select **Upload**.
d. Select **Yes** to confirm you would like to continue. Wait for the course to load.
e. Select **OK** to confirm the course was successfully uploaded.
f. Select **Yes** to activating the course.

If employees are currently taking the existing course, they will lose all progress and will have to retake the course using the new version.



4. Select **Preview** to view how the course will display.



5. Select **Done**.

The most recent modification to the Packaged Course will be date stamped in the section **Last Updated On**.

Create a Training Catalog Item

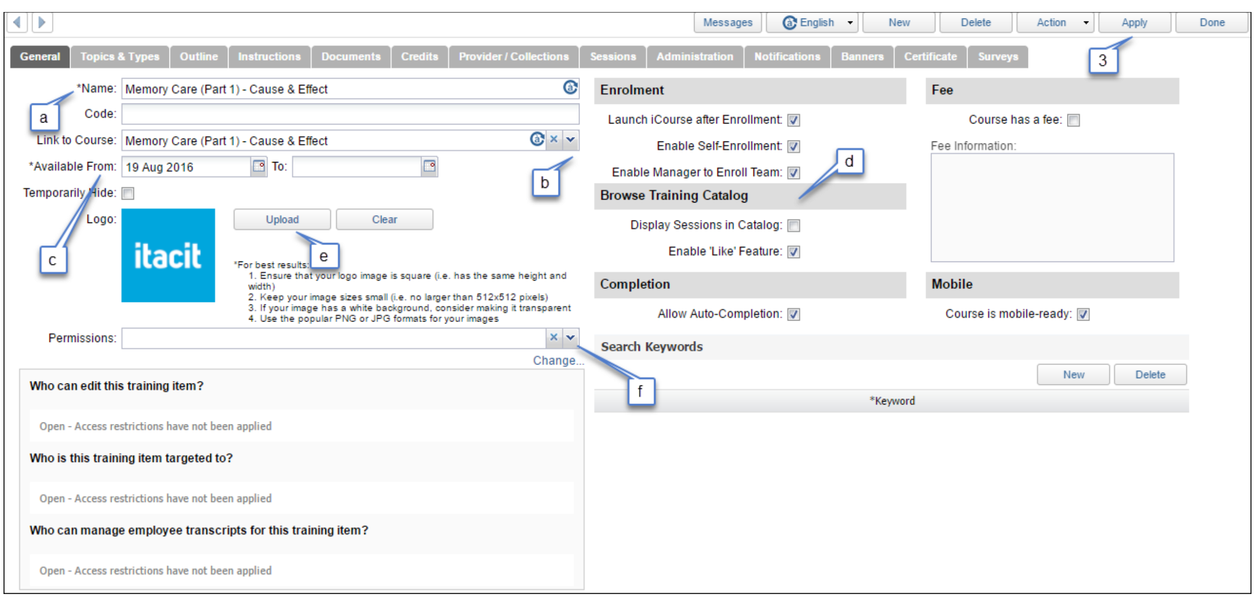
Training Catalog Items are set up for each online course (iCourses and Packaged Courses) offered through iTacit to specify who can see and access these items through the Training Catalog. They are also set up for common in-service or external training you wish to manage and track in iTacit.

1. Select **Menu** > **Training & Education** > **Training Catalog Setup**.

2. In the *Training Catalog Setup* screen select **New**.

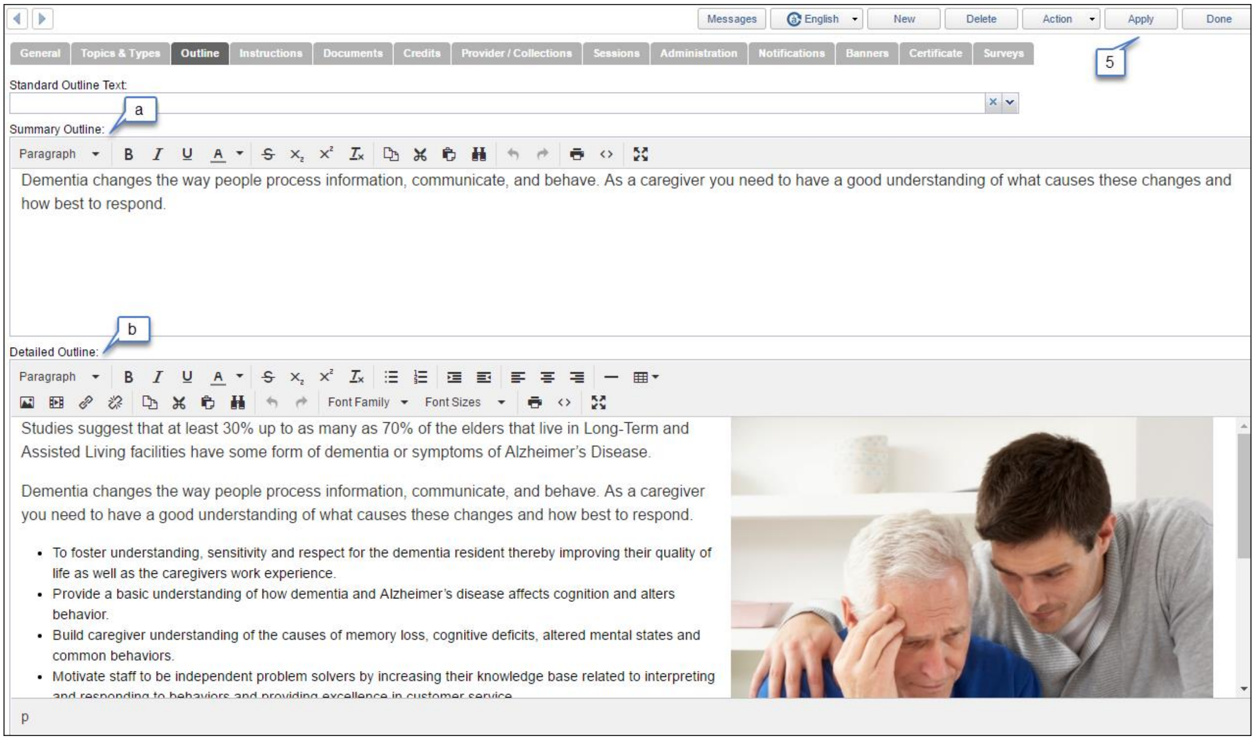
   a. Enter the **Name** of the training item.
   b. Select the **Link to Course** to associate your training item to an **iCourse** or **Packaged Course**.
   c. Select the **Available From** and **To** dates.
   d. You can also configure your training item to:
      i. Temporarily Hide
      ii. Launch iCourse after Enrollment
      iii. Enable Self-Enrollment
      iv. Enable Manager to Enroll Team
      v. Allow Auto-Completion
      vi. Display Sessions in Catalog
      vii. Enable 'Like' Feature
   e. Select **Upload** to add a logo to the news article.
   f. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.

3. Select **Apply** to save.



4. In the *Outline* section:

a. The **Summary Outline** is the brief description that employees will see when they view the training item in the *Training Catalog.*
b. The **Detailed Outline** is the detailed description of the training item. This description will be visible when the training item is selected from the *Training Catalog*.



5. Select **Apply** to save.

6. You can add additional information in the remaining sections:
a. *Topics & Types* – set relevant search criteria so the training item may be found during a search.
b. *Instructions* – enter special enrollment instructions or completion instructions.
c. *Documents* – attach any applicable documents. These will be visible to employees when viewing the training catalog item.
d. *Credits* – add the credit type and number of credits that may be awarded.
e. *Sessions* – set time and dates for one or more training sessions.
f. *Administration* – assign an individual as an administrator for the training item.
g. *Notifications* – set up message notifications to be sent by iTacit.
h. Surveys – add a survey for course participants to complete.

Publish a Training Catalog Item to the Banner

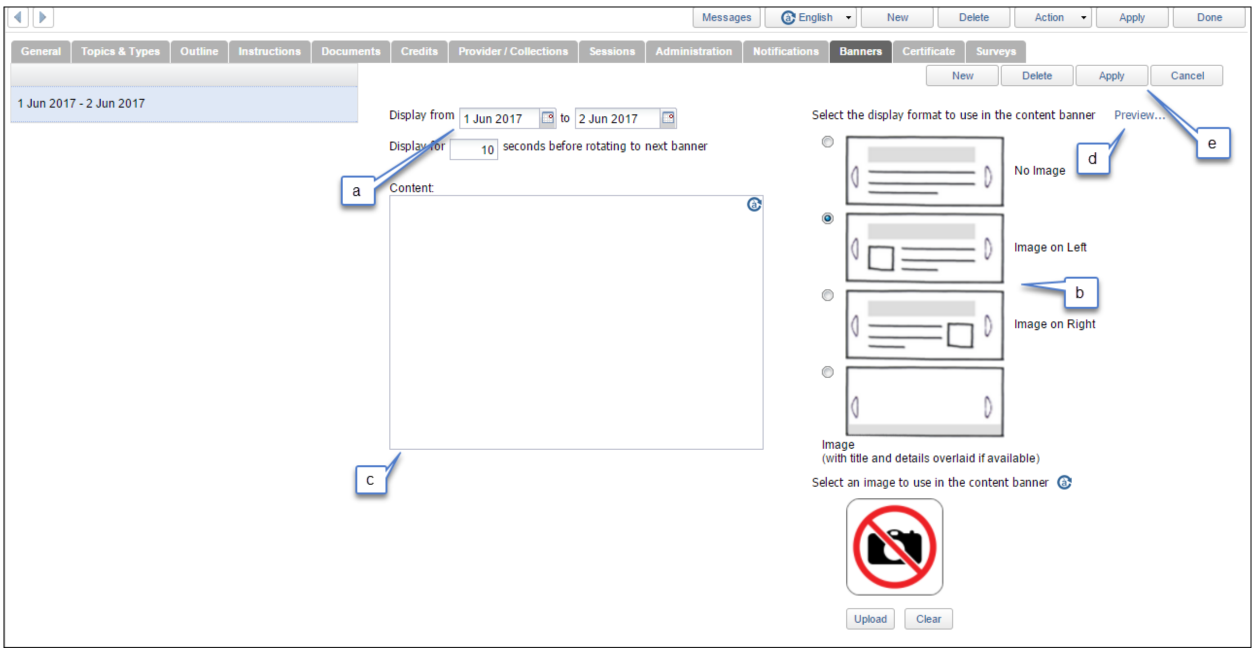
Publish a Training Catalog Item to the banner to catch the employee attention, advertise new courses, and prompt action in completing important courses.

1. Select **Menu** > **Training & Education** > **Training Catalog Setup**.

2. In the *Training Catalog Setup* screen, search for the desired Training Catalog Item.

3. In the *Banner* section:

a. Enter the **From** and **To** dates
b. Select the desired format
c. Enter the **Content** to be displayed in the banner.
d. Select **Preview** to view how the news article will display.



e. Select **Apply**.

Set Up a Certificate for a Training Catalog Item

Each Training Catalog Item has the ability to provide a unique certificate for staff.

1. Select **Menu** > **Training & Education** > **Training Catalog Setup**.

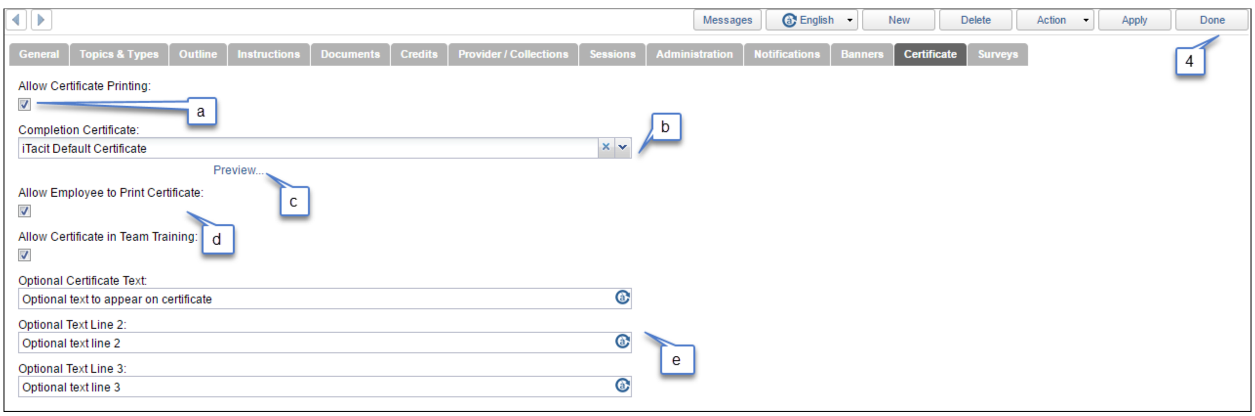
2. In the *Training Catalog Setup* screen, search for the desired Training Catalog Item.

3. In the *Certificate* section:

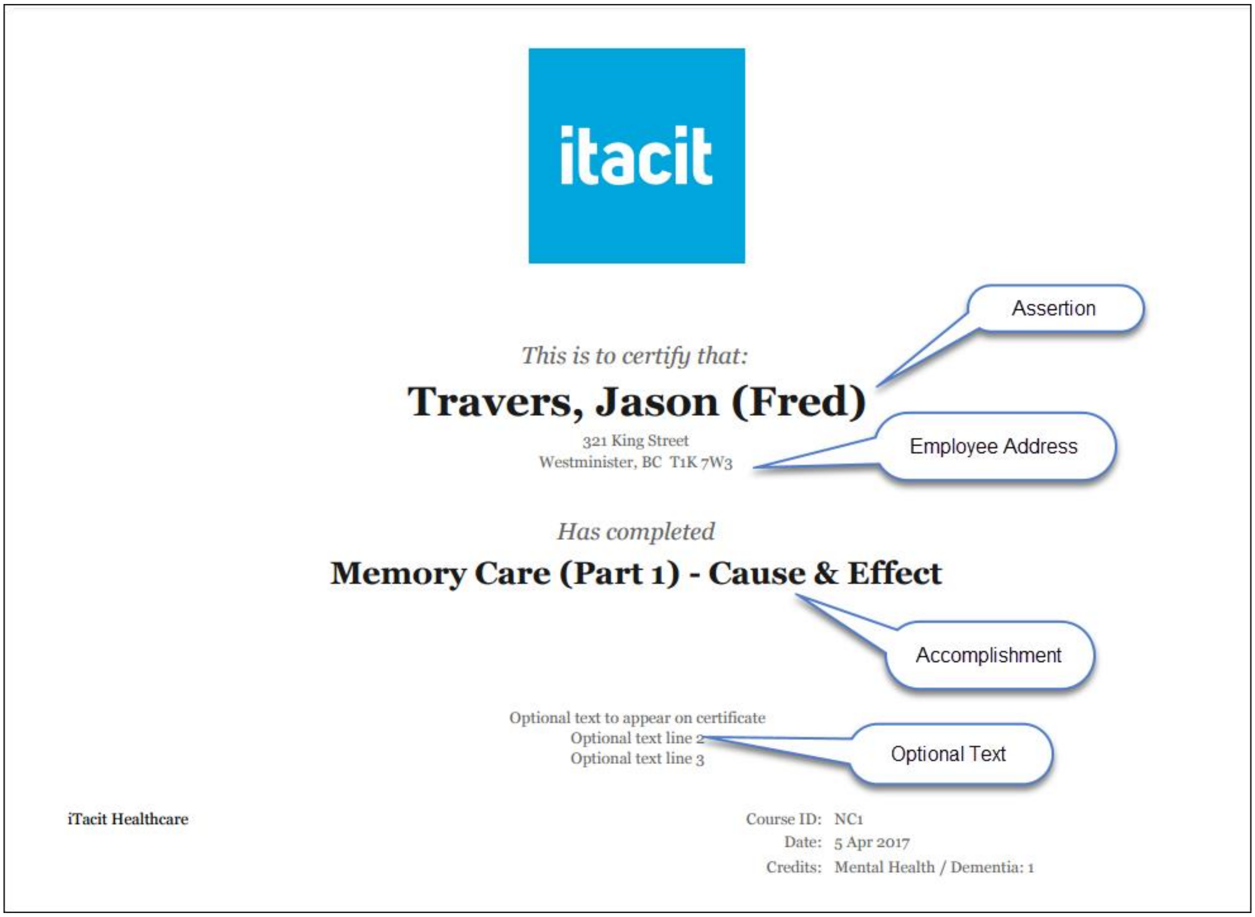
    a. Place a checkmark in the box **Allow Certificate Printing**.
    b. Select the **Completion Certificate** to associate with the training item.
    c. Select **Preview** to view how the certificate will display.
    d. Select the associated permission to allow certificate printing:
        i. **Allow Employee to Print Certificate**: employees will be able to print certificate from My Training.
        ii. **Allow Certificate in Team Training**: managers will be able to print certificate from My Team Training.
    e. Enter the desired **Optional Certificate Text**.

Training administrators will have access to print a certificate via Transcript Manager.

4. Select **Done** to save.



Certificate Preview:

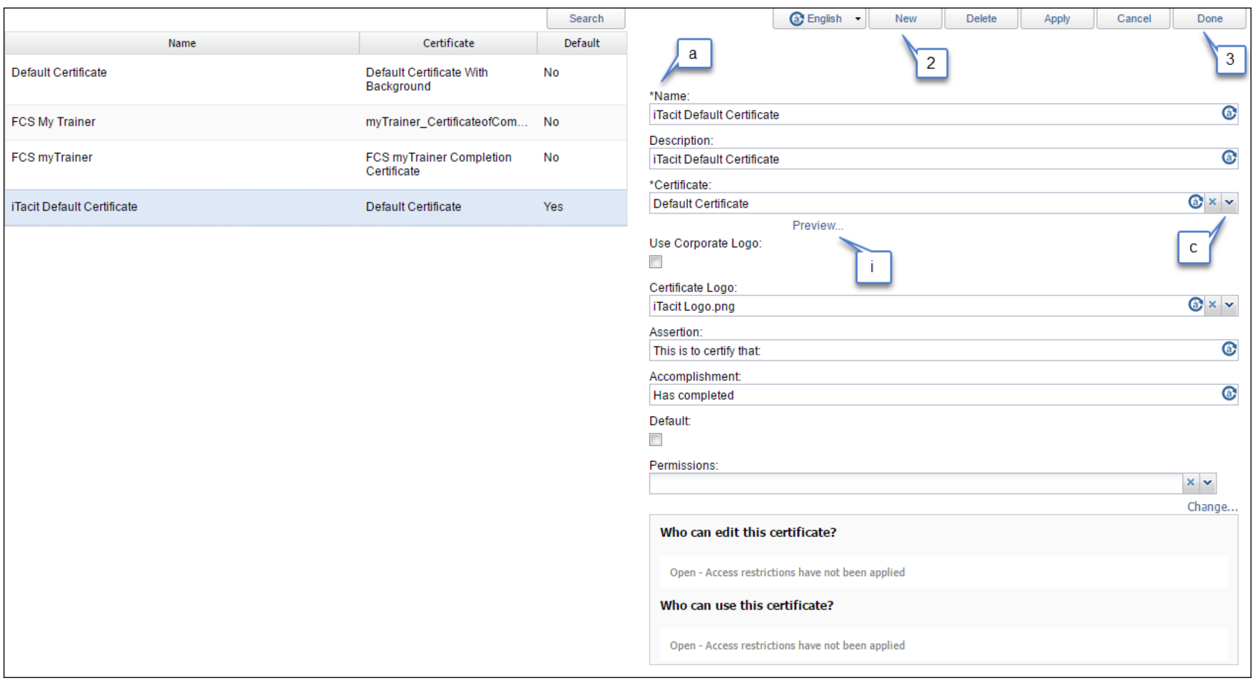


Create a New Training Certificate

1. Select **Menu** > **Training & Education** > **Configuration** > **Certificate Library** > **Certificates**.

2. In the *Certificates* screen select **New**.

    a. Enter a **Name** of the certificate.
    b. Enter a **Description** if applicable.
    c. Select the dropdown option by **Certificate** to upload the .pdf file from the **Certificate Library** > **Media Library.**
    d. Place a checkmark by **Use Corporate Logo** to use your corporate logo that is in iTacit to appear on the certificate.
    e. Select the dropdown option by **Certificate Logo** to select a logo to appear on the certificate.
    f. Enter text into the **Assertion** section that you wish to appear on the certificate.
    g. Enter text into the **Accomplishment** section that you wish to appear on the certificate.
    h. Place a checkmark in the **Default** box to make this certificate appear first in the lookup section.
    i. Select **Preview** to view the certificate.



3. Select **Done** to save.

The Media Library

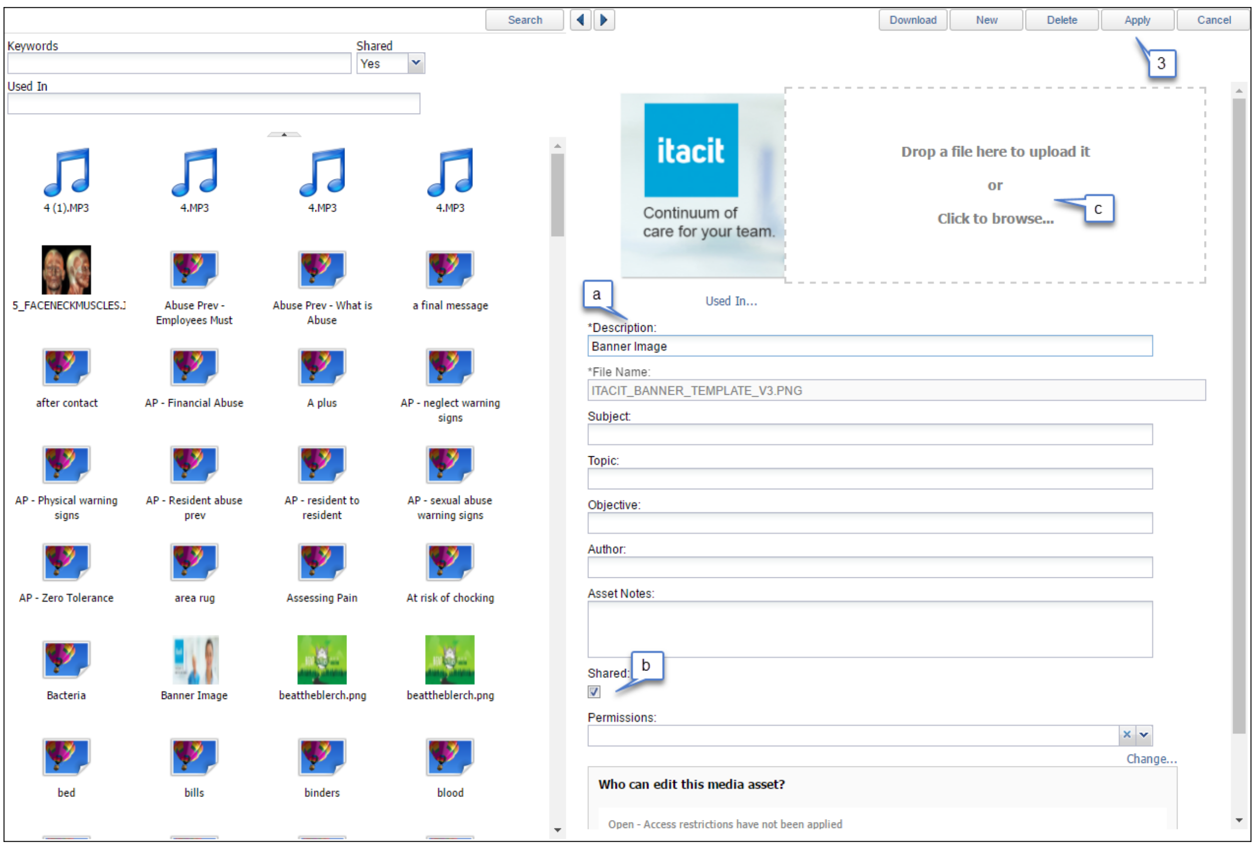
All audio, video, and image files for your Training Catalog Items are stored in the Media Library, so they may be shared and used in multiple documents.

1. Select **Menu** > **Training & Education** > **Media Library**.

Create a new media library item:

2. In the *Media Browser* screen:
   a. Enter a **Description** for the item.
   b. Place a checkmark in the box by **Shared** to ensure your media item is available for use by others.
   c. Select **Browse** to search for the media file you would like to upload.

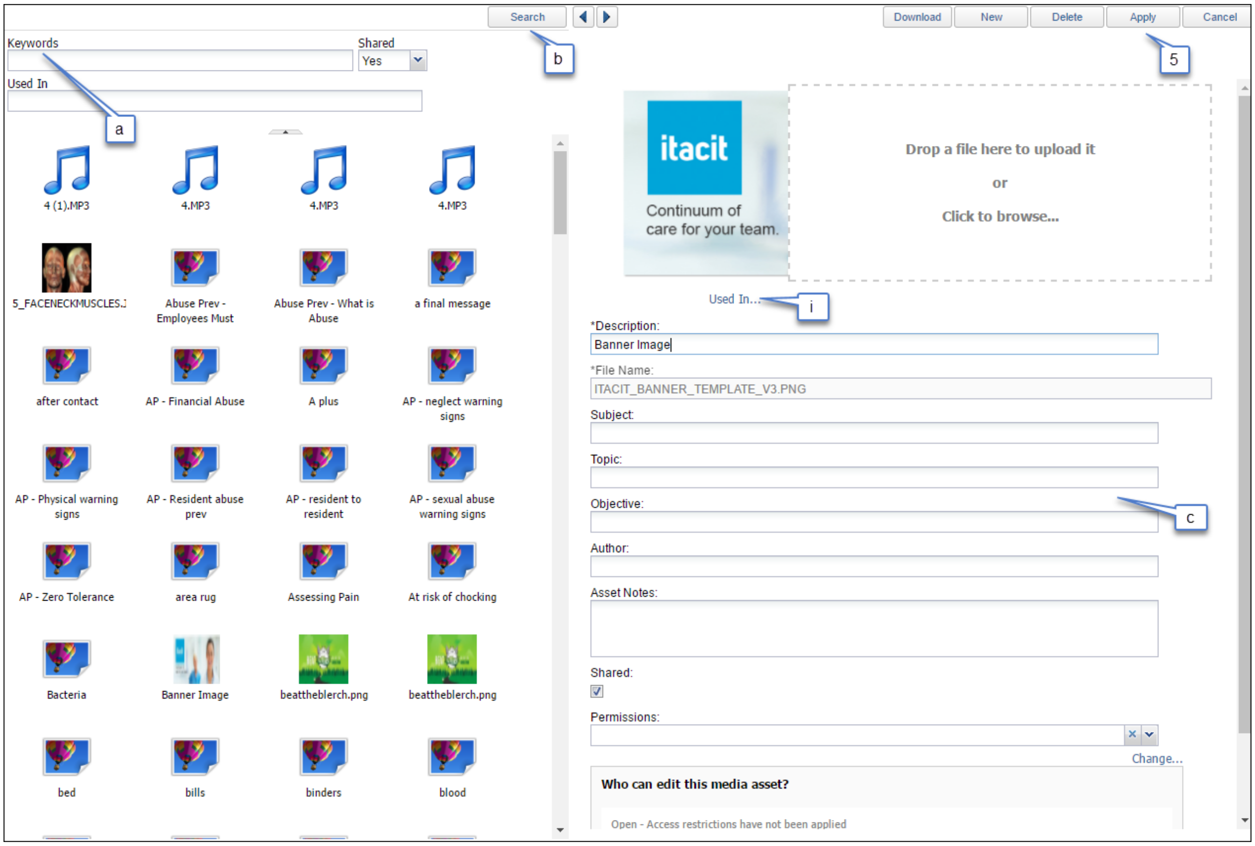
3. Select **Apply**.



View an existing media library item:

4. In the *Media Browser* screen:
   a. Enter **Keywords** to search for the desired media library item.
   b. Select **Search**.
   c. Select the item to display its details on the right side of the screen.

To modify the details of a media item, select it from the list and make your changes on the right side of the screen.



5. Select **Apply**.

Create a Session

You can create sessions, manage enrollment, and track attendance for in-services and external training using the Session Manager. Before following the steps below, be sure your in-service or external course is set up in a corresponding Training Catalog Item.

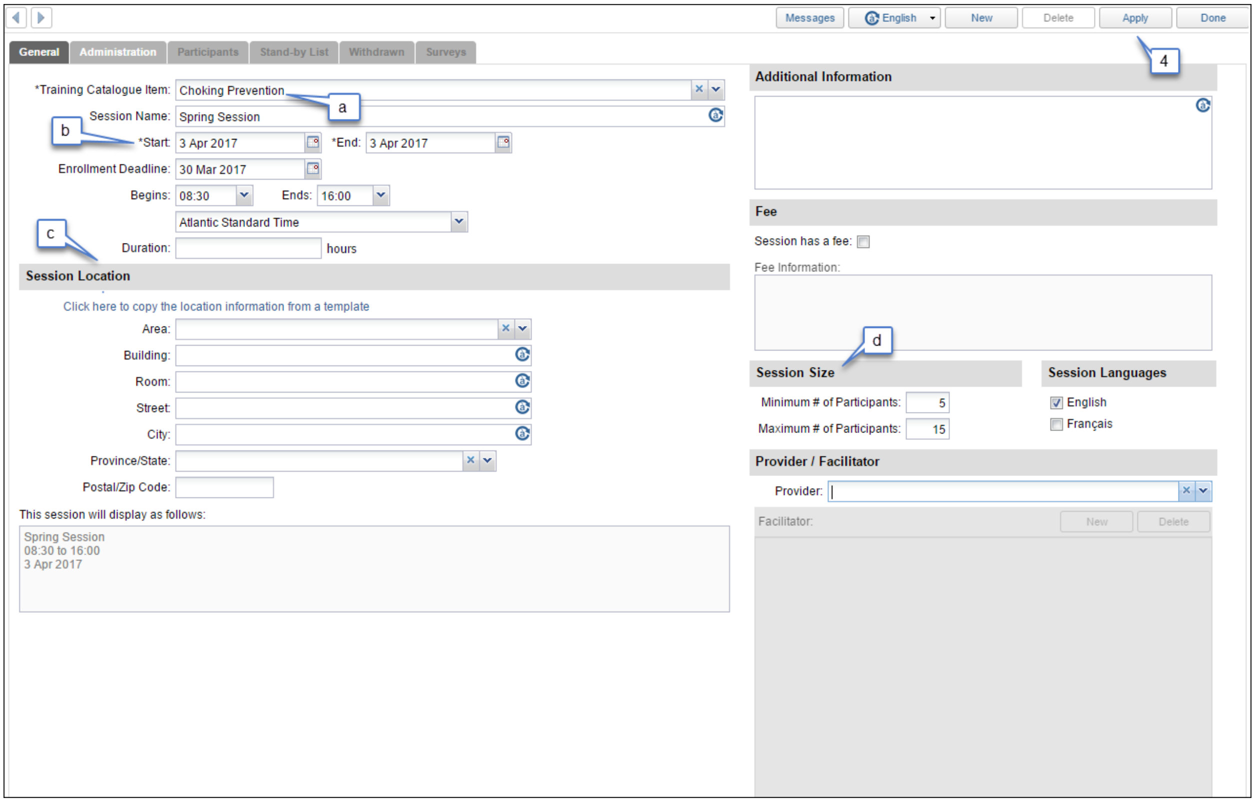
1. Select **Menu** > **Training & Education** > **Training Catalog Set-Up**

Create a Session:

2. In the *Session* tab, select **New**:

a. Enter a **Session Name**.
b. Enter **Start** and **End** dates.
c. Enter **Session Location** if applicable.
d. Enter **Session Size** if applicable.

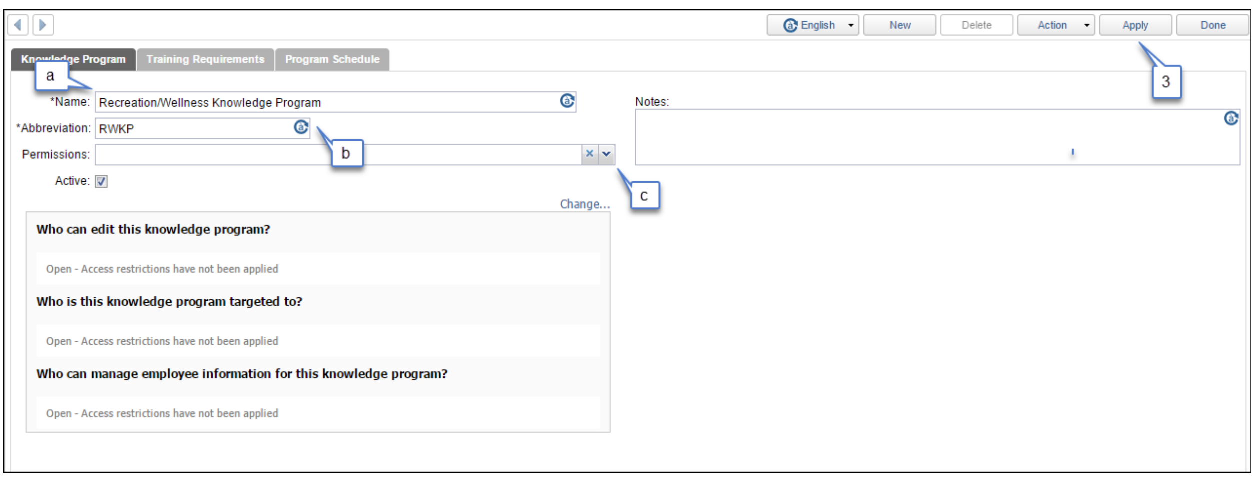
3. Select **Apply**.


Messages
English
New
Delete
Apply
Done
General
Administration
Participants
Stand-by List
Withdrawn
Surveys
4
*Training Catalogue Item: Choking Prevention
a
Session Name: Spring Session
b
*Start: 3 Apr 2017
*End: 3 Apr 2017
Enrollment Deadline: 30 Mar 2017
Begins: 08:30
Ends: 16:00
Atlantic Standard Time
c
Duration:
hours
Session Location
Click here to copy the location information from a template
Area:
Building:
Room:
Street:
City:
Province/State:
Postal/Zip Code:
This session will display as follows:
Spring Session
08:30 to 16:00
3 Apr 2017
Additional Information
Fee
Session has a fee:
Fee Information:
d
Session Size
Minimum # of Participants: 5
Maximum # of Participants: 15
Session Languages
English
Français
Provider / Facilitator
Provider:
Facilitator:
New
Delete

Create a Knowledge Program

A Knowledge Program is a group of training requirements assigned to employees to be completed within a specified timeframe. These may be set up to complete once all training requirements have been met, such as an Orientation Program, or may be scheduled to recur to provide staff with mandatory yearly training requirements. Automated notifications may also be sent to employees and managers to notify them of knowledge program status changes or upcoming due dates.

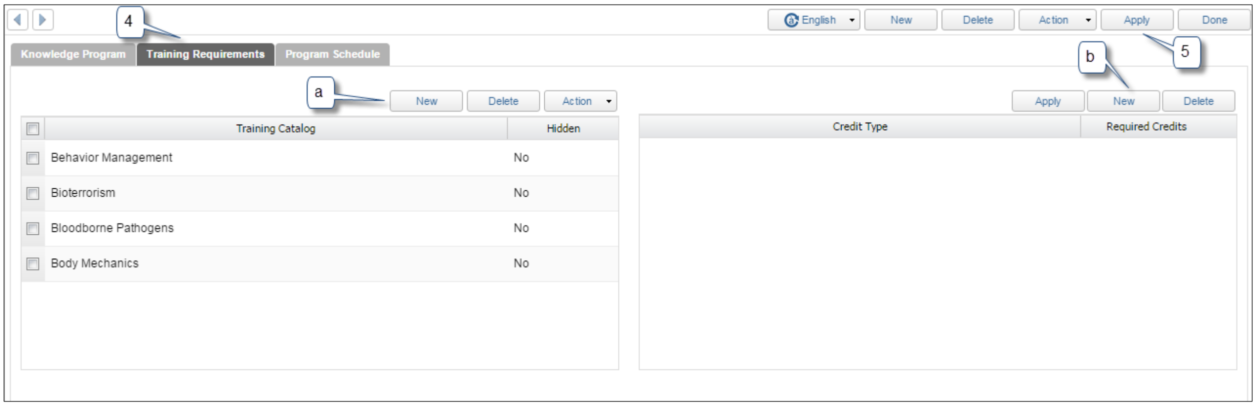
1. Select **Menu** > **Training & Education** > **Knowledge Programs Setup**.
2. In the *Knowledge Programs Setup* screen select **New.**
   a. Enter a **Name** for the Knowledge Program.
   b. Enter an **Abbreviation**.
   c. Choose a predetermined permission group by selecting the dropdown arrow beside **Permissions**.
      Or
      Select **Change** to set permissions without a predetermined permission group.
      i. Search for the desired **Group**, **Business Unit**, **Job Classification** and/or **Role**.
      ii. Select **Add** to be add your selection to the desired section.
      iii. Select **Who does this include?** to view the names of employees included in the desired section.
      iv. Select **Done**.
3. Select **Apply**.



To inactivate a Knowledge Program, remove the checkmark by **Active**.

4. Select the **Training Requirements** tab:

a. In the *Training Item* section select **New**.
   i. Select the desired training items to associate.
b. In the *Credit Type* section select **New**.
   i. Select the desired credit type to associate if applicable.



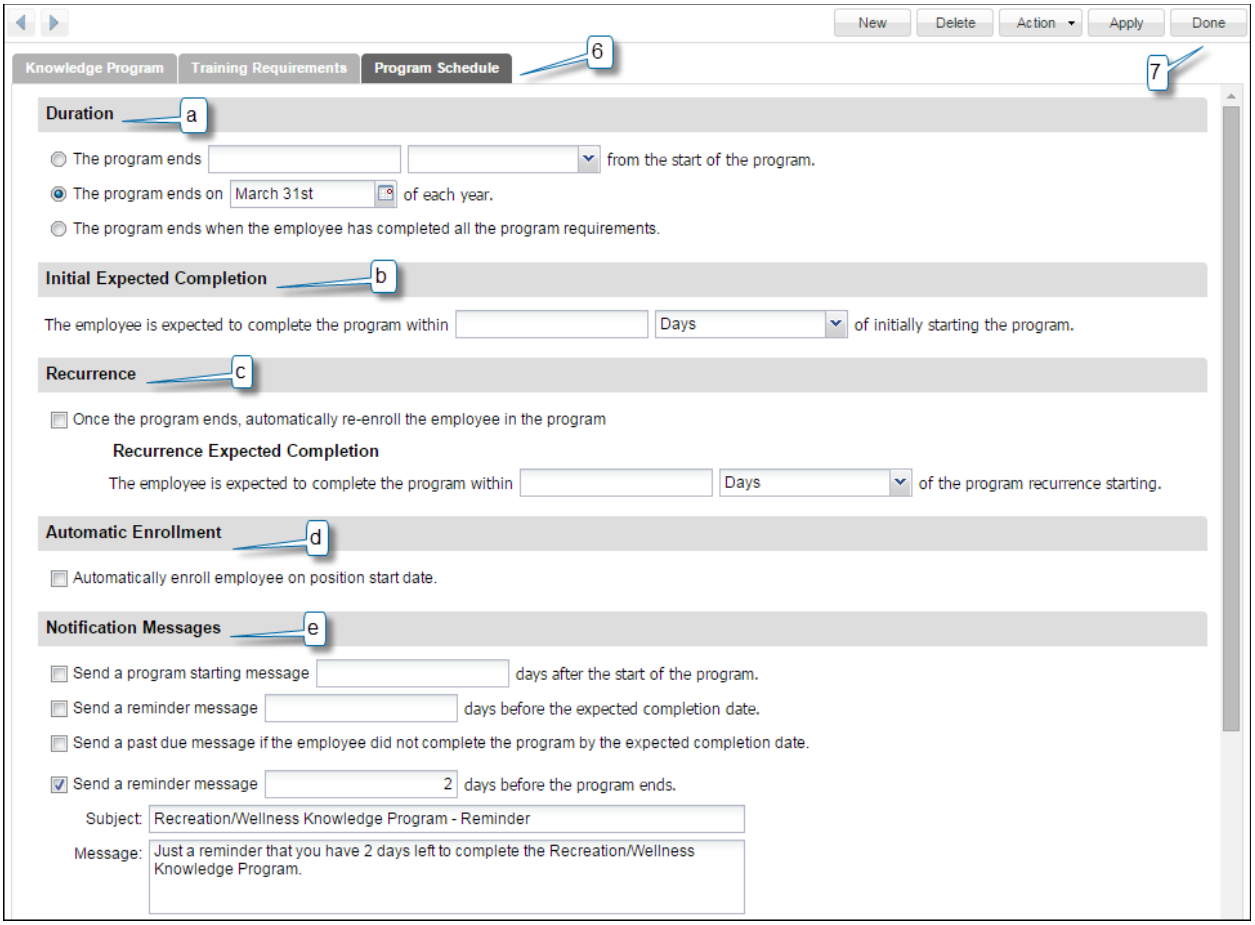
To remove a **Training Item** or **Credit Type**, place a checkmark beside the item. Select **Delete**.

When adding additional **Training Requirements** to an existing Knowledge Program select **Action** > **Propagate Changes** after adding the new training requirement to ensure employees currently enrolled in the Knowledge Program are enrolled in the new training requirement.

5. Select **Apply**.

6. Select the **Program Schedule** tab:

a. Set the **Duration** of the knowledge program.
b. Set the **Initial Expected Completion**.
c. Set the **Recurrence** to automatically re-enroll employees.
d. Set the **Automatic Enrollment** to enroll employees on their role start date.
e. Set the **Notification Messages** to be sent to employees.



7. Select **Done**.

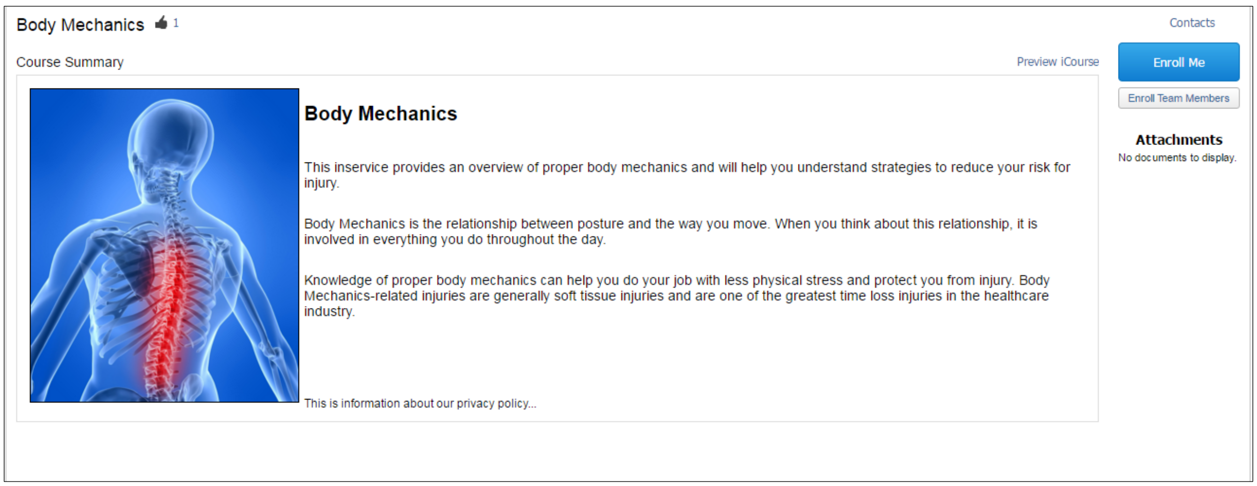
TRAINING & EDUCATION – Standard Use

Assign Training through the Training Catalog

The easiest way to enroll an employee in online training is through the **Training Catalog**. Using the ***Enroll Team Members*** button once you have selected a particular training item, managers can assign the item to a portion of or to their entire team.

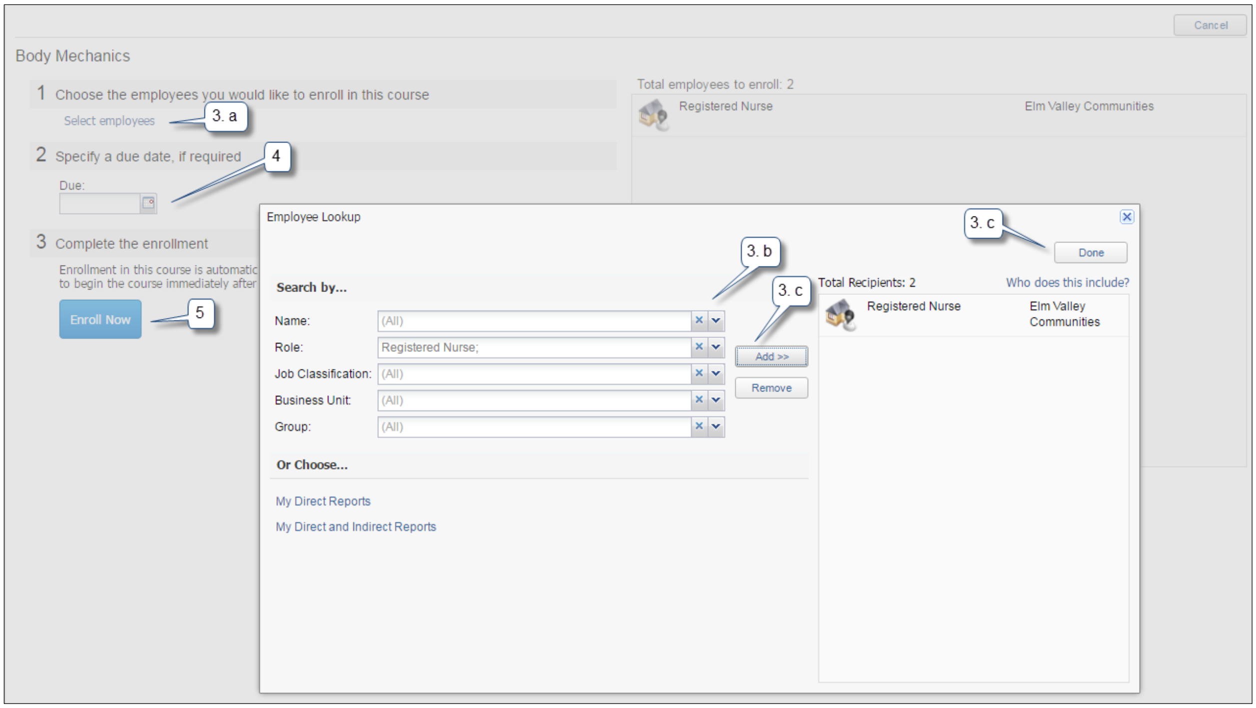
1. Select the **Training Catalog.**

2. *Search for and select* the course you wish to enroll employees, using search criteria on the side.



3. Select **Enroll my Team**. *(See image on next page)*

   a. Click **Select employees**
   b. Use the Employee Lookup window to choose the employees, roles, business units, job classifications, or groups you wish to enroll.
   c. Click **Add** to include those chosen to the Total Recipients list.
   d. Click **Done**.



4. Select a **Due Date**, if necessary.
5. Click **Enroll Now**.

Assign Training using the Transcript Manager

In iTacit, training records are called transcripts. In the Transcript Manager you can create new transcripts which allows you to assign training or record previously completed training.

1. Select **Menu** > **Training & Education** > **Transcript Manager**.

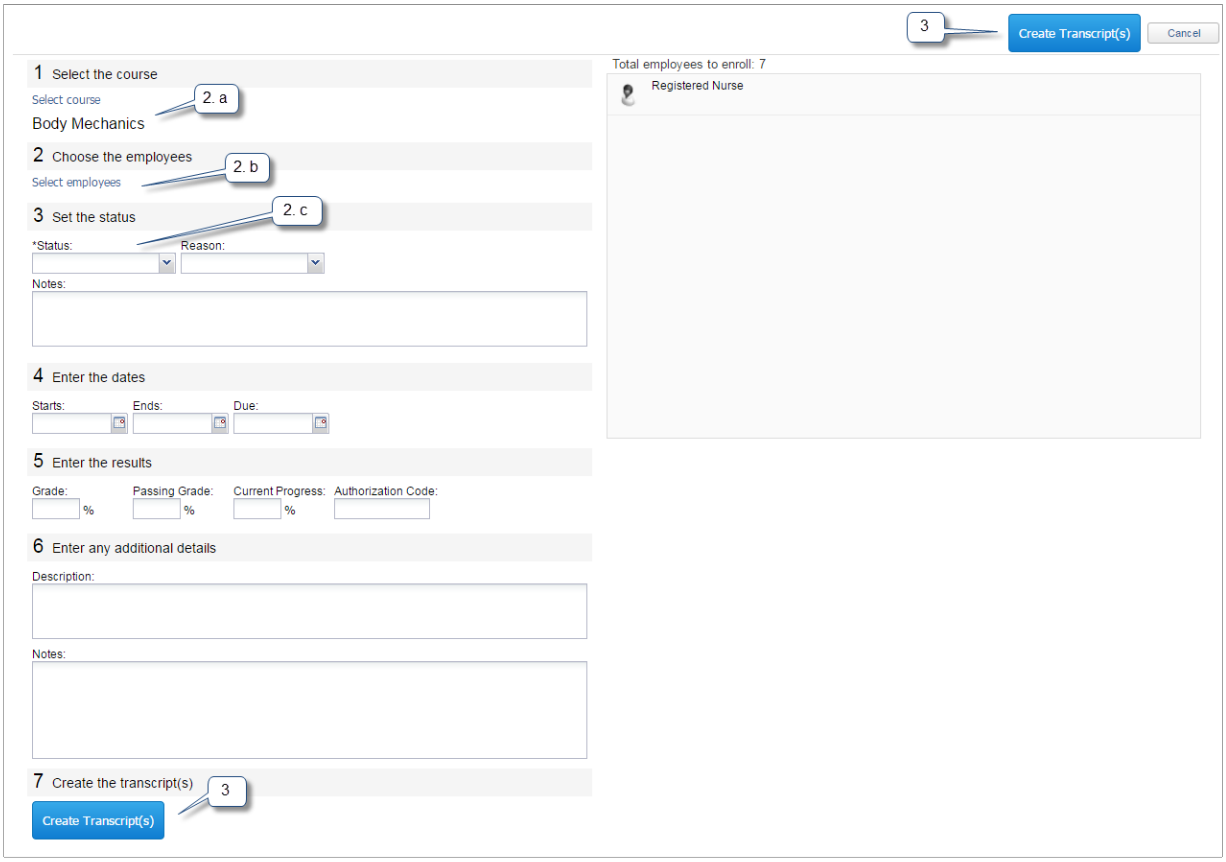
Enroll a Single Employee OR Multiple Employees:

2. In the *Transcript Manager* screen select **New** > **Create Transcript** (Note: A Create Transcript tab will appear.)

a. Click **Select** Course to choose the course to enroll employees (Course Lookup window will appear).
b. Click **Select Employees** to choose a single employee or a group of employees (Employee Lookup window will appear). Selected employees will appear in the **Total employees to enroll** box.
c. Select the **Status** of the transcript to be created. If employees are being enrolled, select **Enrolled**.

Enter the **Due** date, **Description**, and **Notes** details if applicable. Never enter in an End date unless you are recording training that has been completed. Set the status to **Completed** in this case.

3. Select **Create Transcript(s)**.



To create a record or transcript for courses being taken outside of iTacit, enter the training item title in the **Course** section. If you will regularly be tracking this outside course, consider creating a Training Catalog Item.

A confirmation pop up will appear informing you that you will receive an email notification once all employees have been enrolled in the transcripts.

Manage Training Records through the Transcript Manager

All training records (of enrollment, progress, completion, and withdrawal) can be created and managed using the Transcript Manager. This includes online training, in-services, and outside training not completed through iTacit.

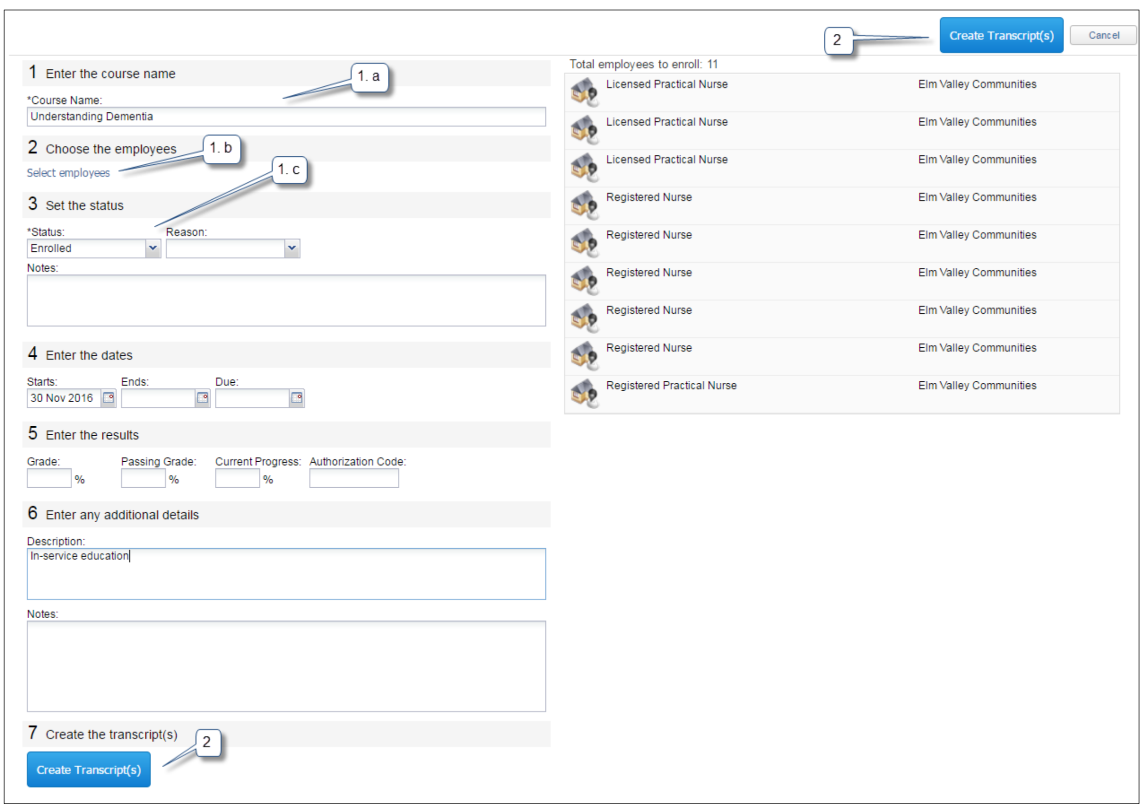
Create Transcripts for In-Service or Outside Training

1. In the *Transcript Manager* screen select **New** > **Create External Transcript(s)**.

  a. Enter the training item title in the **Course Name** section.
  If you will regularly be tracking this outside course, consider creating a Training Catalog Item.
  b. Click **Select Employees** to choose a single employee or a group of employees (Employee Lookup window will appear). Selected employees will appear in the **Total employees to enroll** box.
  c. Set the desired status. If this is a future transcript, set to **Enrolled**. If this a transcript for a course already finished, set to **Completed**.

Enter the **Starts / Ends** dates to indicate when the course was completed. Add a description of the training provider and any other applicable details.

2. Select **Done**.



A confirmation pop up will appear informing you that you will receive an email notification once all employees have been enrolled in the transcripts.

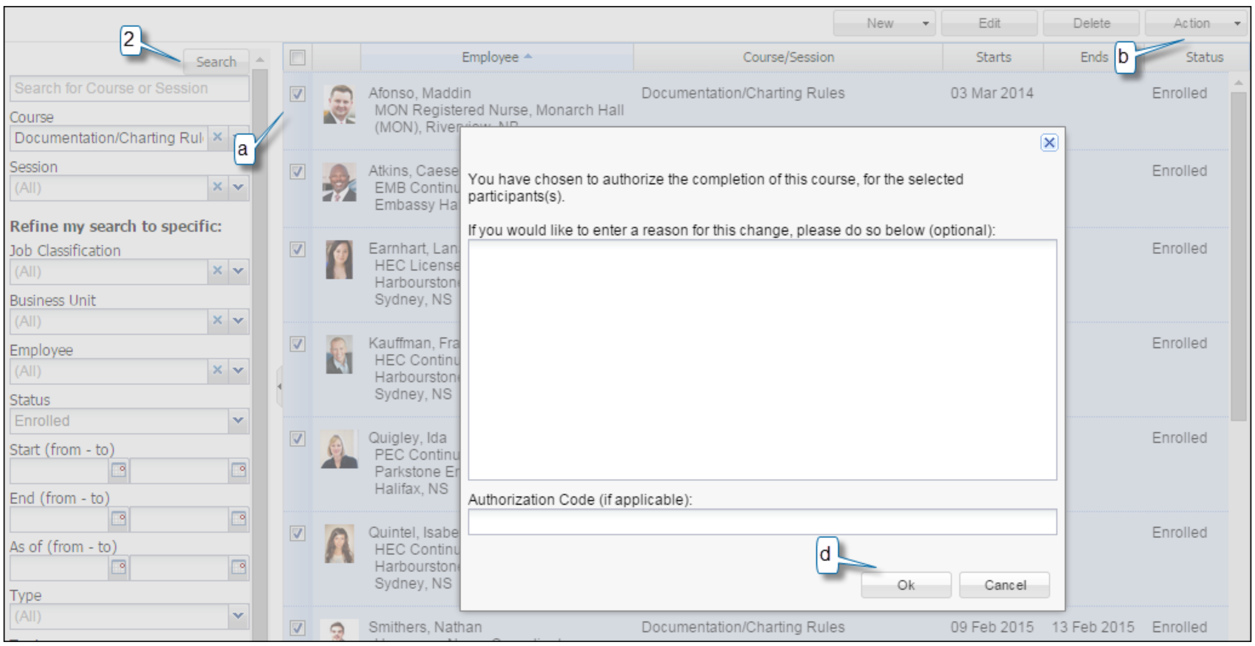
Update a Transcript

Modify records in the Transcript Manager to indicate a change in status.

1. Select **Menu** > **Training & Education** > **Transcript Manager**.

2. In the *Transcript Manager* screen, search for the transcripts you would like to edit filtering by course, job classification or business unit, status, or date.

   a. Place a checkmark by the desired transcript(s).
   b. Select **Action** > then choose your desired action.
      i. **Approve Enrollment** – Change an Enrollment Requested Status to Enrolled
      ii. **Complete** – Mark a course as being Completed
      iii. **Complete (unsuccessful)** – Mark a course as failed.
      iv. **Withdraw** – Withdraw the employee from the course.
   c. The associated confirmation window will appear.
      i. Enter a reason for the change if applicable.
   d. Select **Ok**.

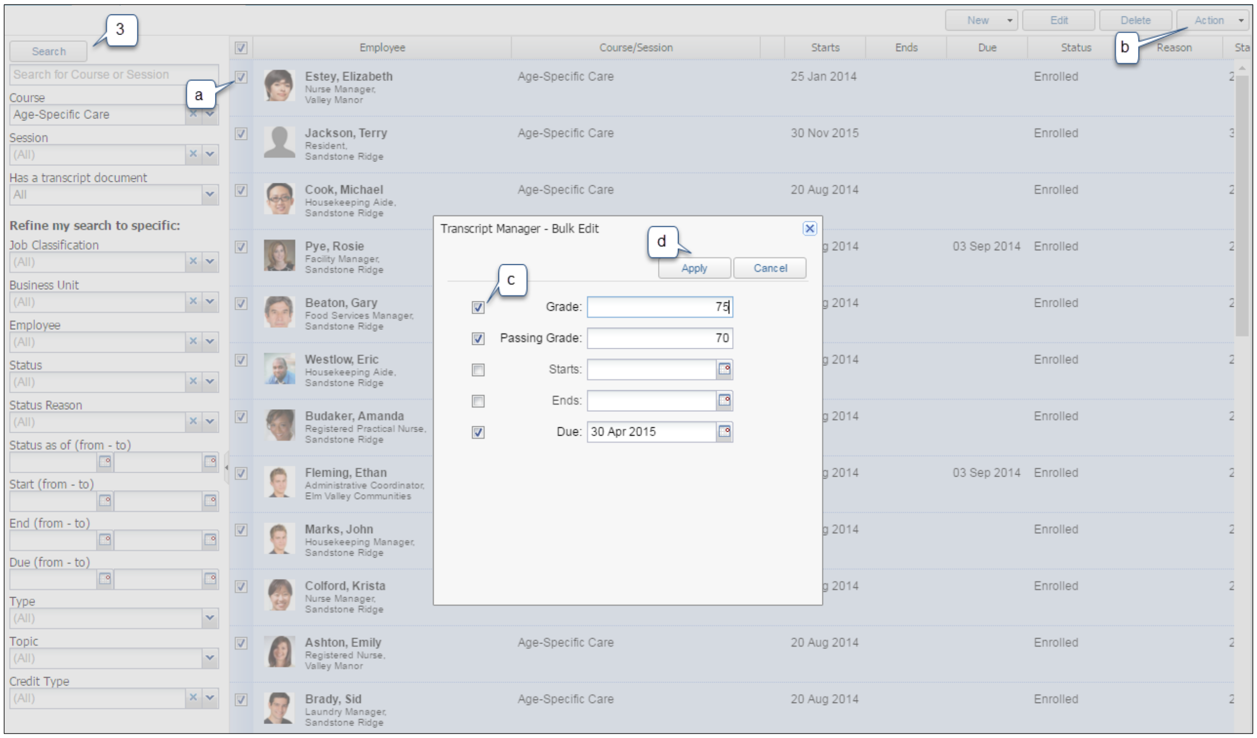


To manually update transcripts, select **Edit** instead of selecting **Action** in step **b** and update each profile individually. Use the Next/Previous buttons to navigate from transcript to transcript.

Bulk Edit Transcripts

3. iTacit allows you to assign the same grade to many transcripts at once. In the *Transcript Manager* screen, search for the transcripts you would like to edit filtering by course, job classification or business unit, status, or date.

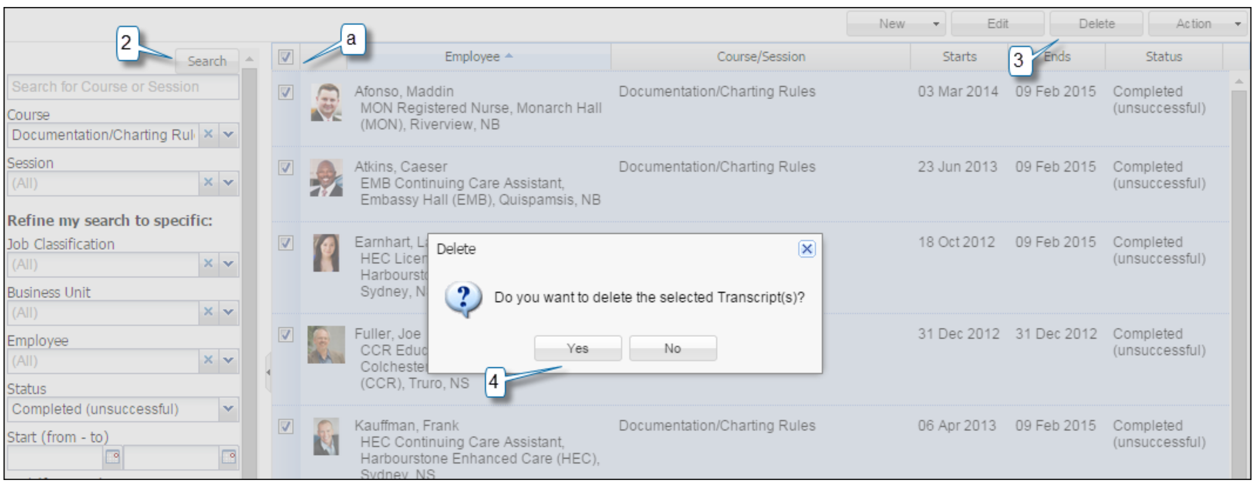
a. Place a checkmark by the desired transcripts.
b. Select **Action** > **Bulk Edit**.
c. Enter the **Passing Grade** and/or **Grade** for each selected transcript.
d. Select **Apply**.



Manage Failed Transcripts

If an employee has failed a course, Completed (unsuccessfully), they can take the course again by re-enrolling from the Training Catalog or you can re-assign the course to them. You cannot “reset” a transcript by changing its status. If you wish to erase the record of an employee failing the course, you will need to delete the associated transcript for that course. Leaving the failed course on record will simply show that the employee took the course twice to meet the requirements.

1. Select **Menu** > **Training & Education** > **Transcript Manager**.
2. In the *Transcript Manager* screen search for the transcripts.
   a. Place a checkmark by the desired transcripts.
3. Select **Delete**.
4. Select **Yes**.



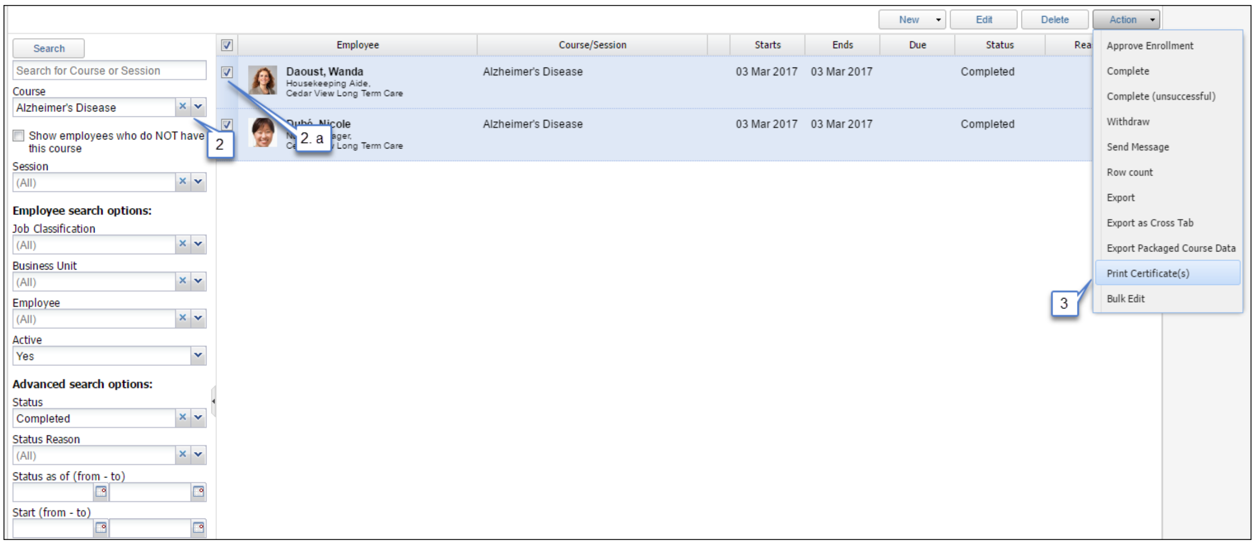
You will need to create new transcript or ask the employee(s) to re-enroll through the Training Catalog so the employee(s) can retake the course.

Print a Training Certificate

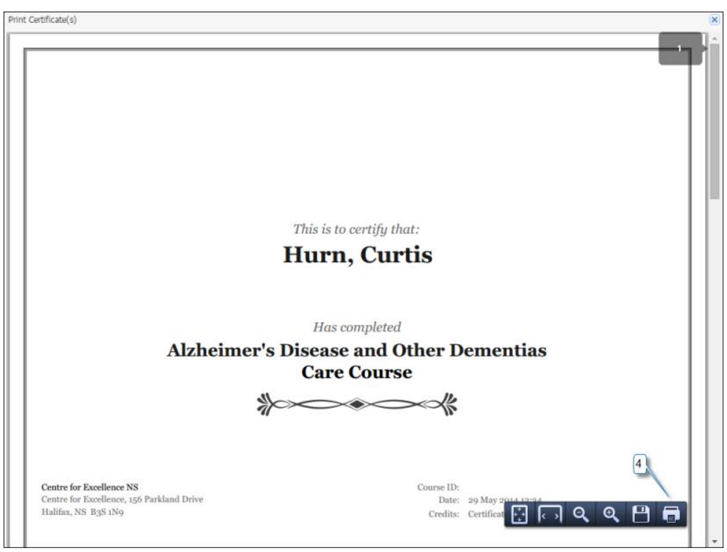
There are multiple methods to printing certificates.

Transcript Manager:

1. Select **Menu** > **Training & Education** > **Transcript Manager**.
2. In the *Transcript Manager* screen search for the desired transcript.
   a. Place a checkmark by the desired transcripts.
3. Select **Action** > **Print Certificate(s)**



4. The **Print Certificate(s)** window displays, select the **Print** icon.

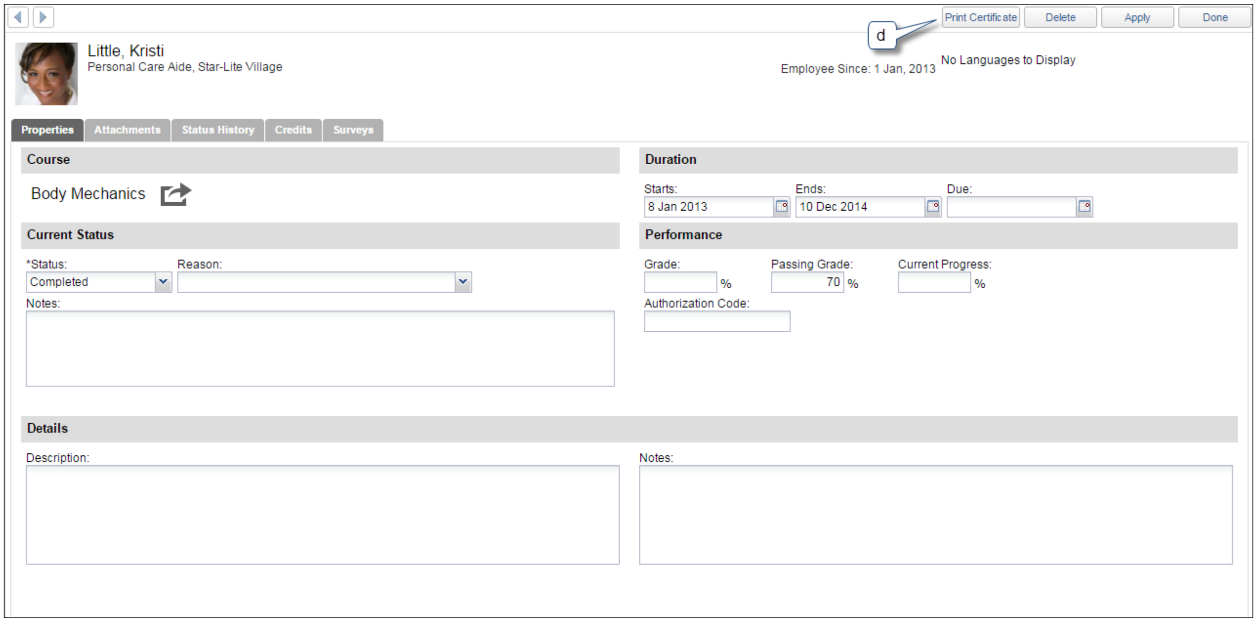


Employee Profile:

5. Select **Menu** > **Employees** > **Employee**.

6. In the *Employees* screen search for the desired employee.

a. Click directly on the employee.
b. Navigate to the **Transcript** tab.
c. Click directly on the desired transcript.
d. Select **Print Certificate**



7. Follow step 4 above to print certificate.

Manage a Session

You can manage enrollment and track attendance for in-services and external training using the Session Manager. Before following the steps below, set up your in-service or external course as a Training Catalog Item and create a New Session.

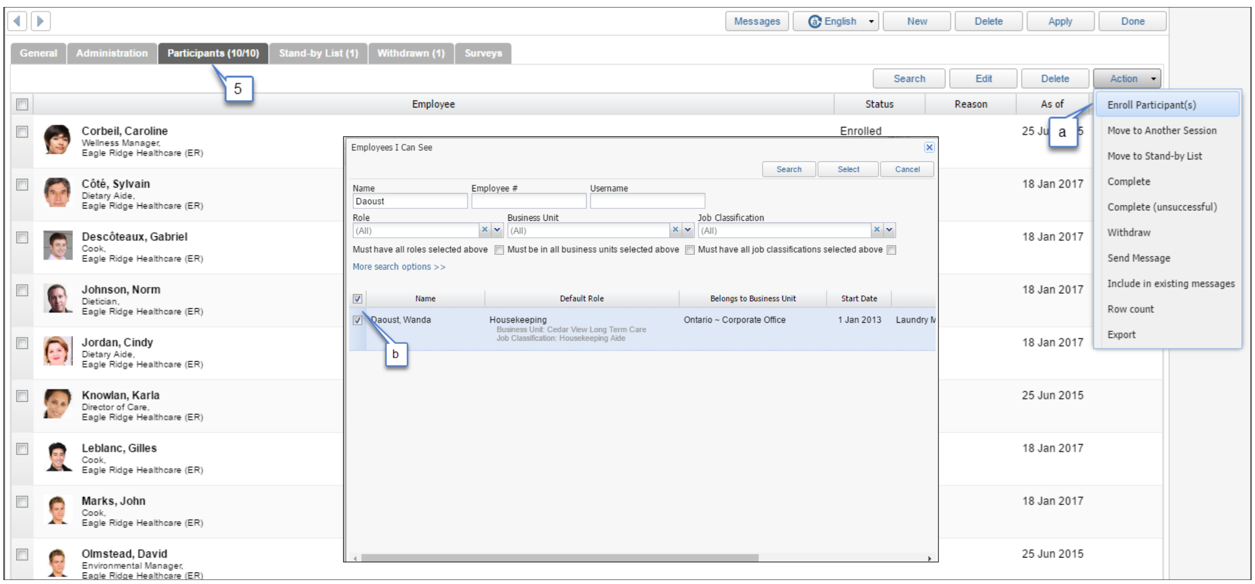
1. Select **Menu** > **Training & Education** > **Session Manager**.

2. In the *Session Manager* screen, search for the session you would like to modify filtering by course or date. Select the Session.

Manage Enrollment:

3. Select the **Participants** tab.

    a. Select **Action** > **Enroll Participant(s).**
    b. Search for and select the desire employee(s).
    c. An **Enrollment Confirmation** window will appear, click **OK**.
    d. Select **Search** to view all enrolled participants.



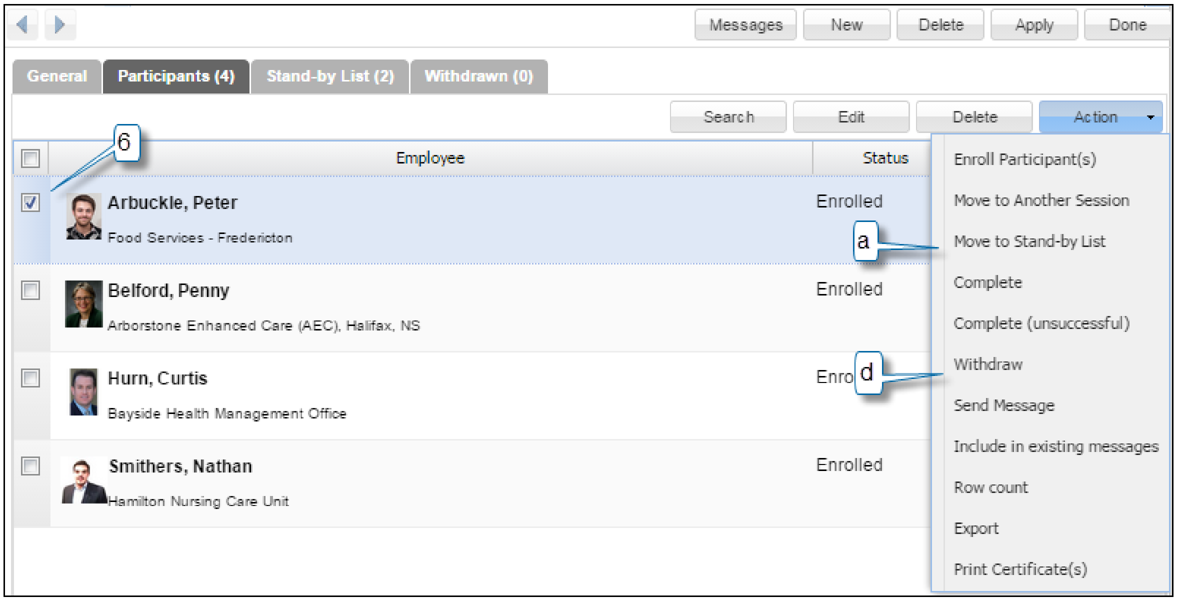
4. To move an employee from the **Participants** list to **Stand-by List** or **Withdrawn** sections, place a checkmark by the desired employee(s).

    a. Select **Action** > **Move to Stand-by List**.
    b. Enter a reason for the change if applicable.
    c. Select **Ok**.

    Or

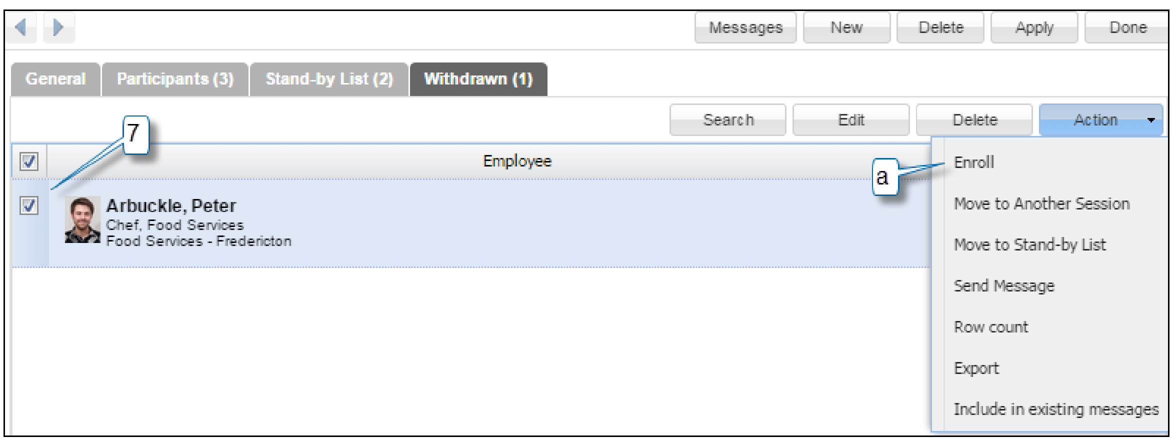
    d. Select **Action** > **Withdraw**.
    e. Enter a reason for the change if applicable.
    f. Select **Ok**.

We're all about people.
They are one of your greatest assets.



5. To move an employee from either the **Stand-by List** or **Withdrawn** sections to the **Participants** section, place a checkmark by the desired employee.

    a. Select **Action** > **Enroll**.



6. To move an employee to another session, place a checkmark by the desired employee(s) within the preferred section.

    a. Select **Action** > **Move to Another Session**.
    b. Select the desired session in the **Move To Another Session** pop up window.

7. To indicate that an employee has completed the session, place a checkmark by the desired employee(s) in the **Participants** list.

    a. Select **Action** > **Complete**.

8. Select **Done** to save session changes.

Report on Employee Training Progress

Employee progress can be monitored and reported upon using the Team Training tool or using the Transcript Manager. Information collected through these tools can then be exported to an Excel Spreadsheet to create reports.

Export Transcript Information from the Transcript Manager

1. Select **Menu** > **Training & Education** > **Transcript Manager**.

2. Selecting **Search** in the *Transcript Manager* screen will display all transcripts related to employee training.

   For specific training records, filter your results by desired criteria:

   - Course
   - Status
   - Date
   - Business Unit or Job Classification
   - Etc.

   a. Place a checkmark by the desired transcripts you wish to include in your report.

3. Select **Action** > **Export**.

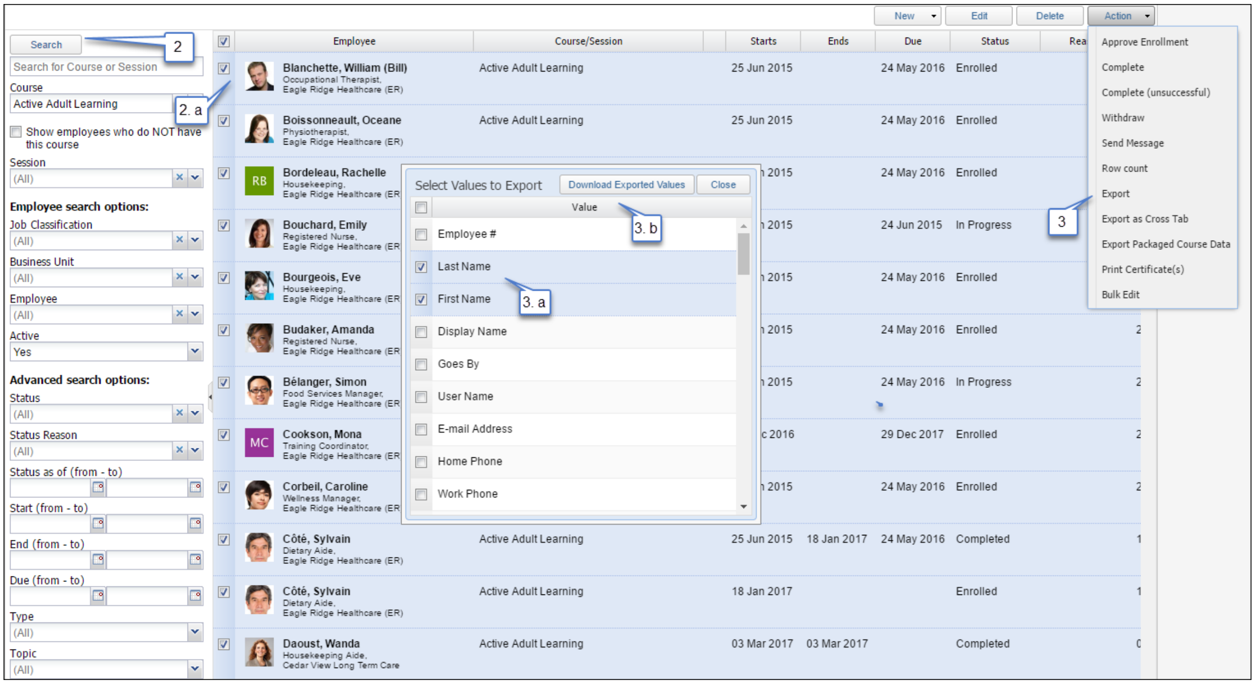
   a. Place a checkmark beside the information you want to include from **Values to Export** list provided.

   Some clients prefer to include all available values in the export, then to sort, manipulate, and delete extra information in Excel afterwards.

   You may find it easiest to export just the following recommended values:

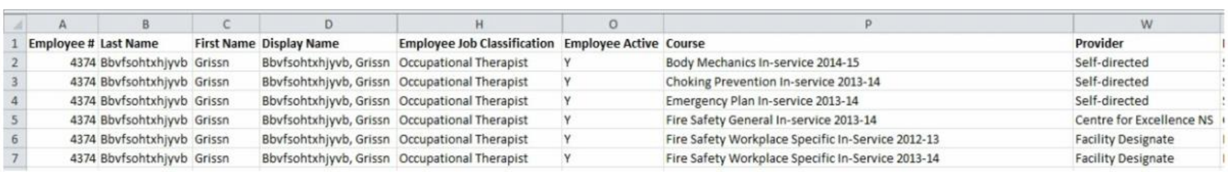
   - Display Name (or First and Last)
   - Employee Role
   - Course (and Course Alias if for a course not delivered through iTacit)
   - Start and End Dates
   - Status
   - Grade

   b. Select **Download Exported Values**.
   c. A confirmation window will display, select **Yes**.



d. Your export is downloaded to your computer. If you are not prompted to open the file, you should be able to access it in your Downloads folder.

Example:



	A	B	C	D	H	O	P	W
1	Employee #	Last Name	First Name	Display Name	Employee Job Classification	Employee Active	Course	Provider
2	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Body Mechanics In-service 2014-15	Self-directed
3	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Choking Prevention In-service 2013-14	Self-directed
4	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Emergency Plan In-service 2013-14	Self-directed
5	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Fire Safety General In-service 2013-14	Centre for Excellence NS
6	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Fire Safety Workplace Specific In-Service 2012-13	Facility Designate
7	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Fire Safety Workplace Specific In-Service 2013-14	Facility Designate

The columns of information in Excel can easily be rearranged, sorted, and paired down to meet your reporting needs. For example, you could sort based on Status to see those who have completed a course, have not started (Enrolled), or are In Progress.

Export Information as a Cross Tab Report

Exporting to a Cross Tab Report in Excel provides the ability to look at training records grouped by employee. The spreadsheet shows all employees in your search, as well as their training progress in each course.

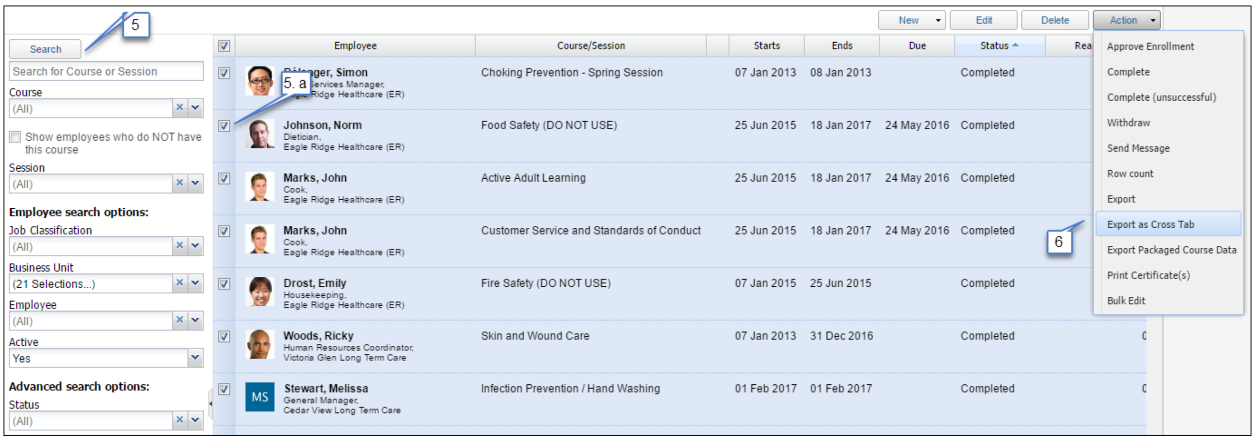
4. Select **Menu** > **Training & Education** > **Transcript Manager**.

5. Selecting **Search** in the *Transcript Manager* screen will display all transcripts results.

   To gather specific information, filter your results by Employee, Job Classification, or Business Unit, or Date.

   a. Place a checkmark by the desired transcripts you wish to export for your report.

6. Select **Action** > **Export as Cross Tab**.



7. Your export is downloaded to your computer. If you are not prompted to open the file, you should be able to access it in your Downloads folder.

Example:

	A	B	C	D	E
1	**Employee**	**Role**	**AODA Staff Training**	**Choking Prevention**	**Fall Prevention**
2	Employee 1	Cook I, (Scarborough) Dietary, (Scarborough) Dietary	Enrolled	Enrolled	
3	Employee 2	Cook I, (Scarborough) Dietary, (Scarborough) Dietary	Completed (100% - Passed)	Completed (95% - Passed)	
4	Employee 3	Cook II, (Scarborough) Dietary, (Scarborough) Dietary	Enrolled	Enrolled	
5	Employee 4	Cook II, (Scarborough) Dietary, (Scarborough) Dietary	Completed (100% - Passed)	Completed (90% - Passed)	Completed (91% - Passed)

This Excel spreadsheet that has a row for each employee, with the columns as the course results. You can see if the employee has Completed the course, is In Progress, or is Enrolled. If the cell is empty, it means that the employee has not been assigned that specific course.

Track Employee Progress Using the Team Training Tool

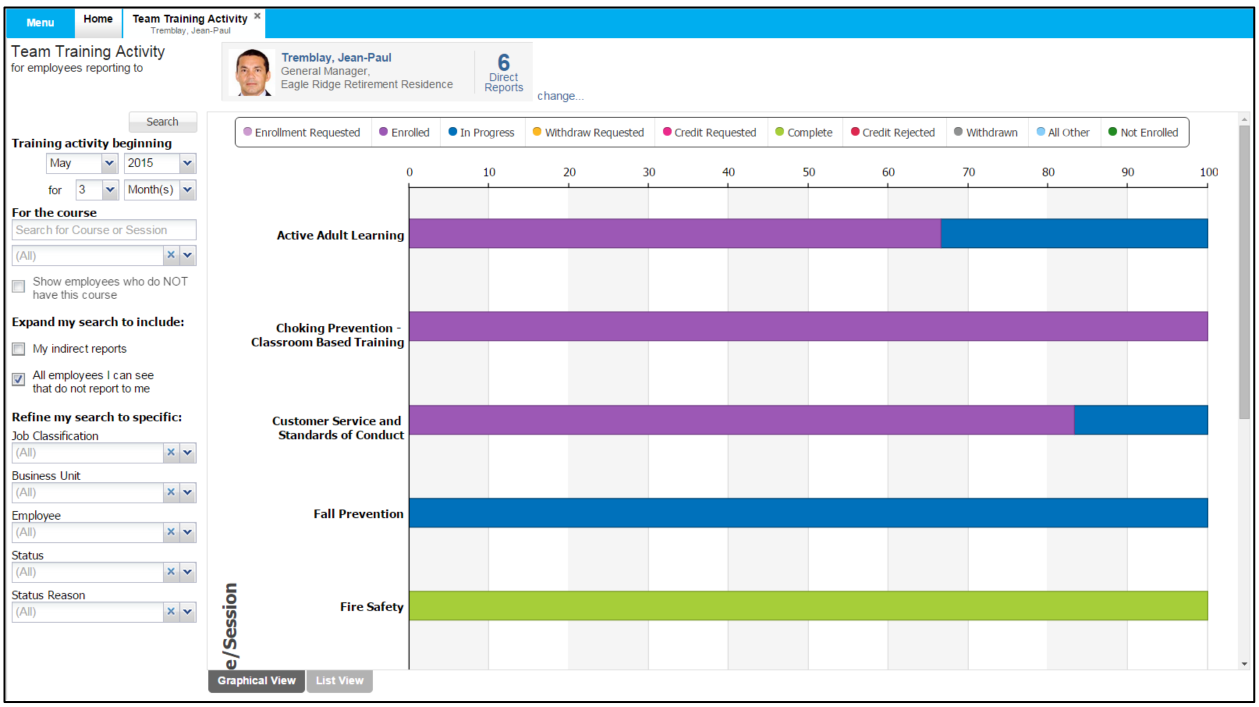
Managers can view their team's training progress directly on the dashboard through Team Training. This tool also allows managers to send messages (if subscribed), print certificates, and export information to Excel for reporting purposes.

1. Select **Team Training** on your dashboard.
2. Set the activity period. Use the **Month** and **Year** drop-downs to specify the beginning of the activity period. Then, select the timeframe for which you want to see results.
3. Enter the course title, or choose the drop-down option to select a course.

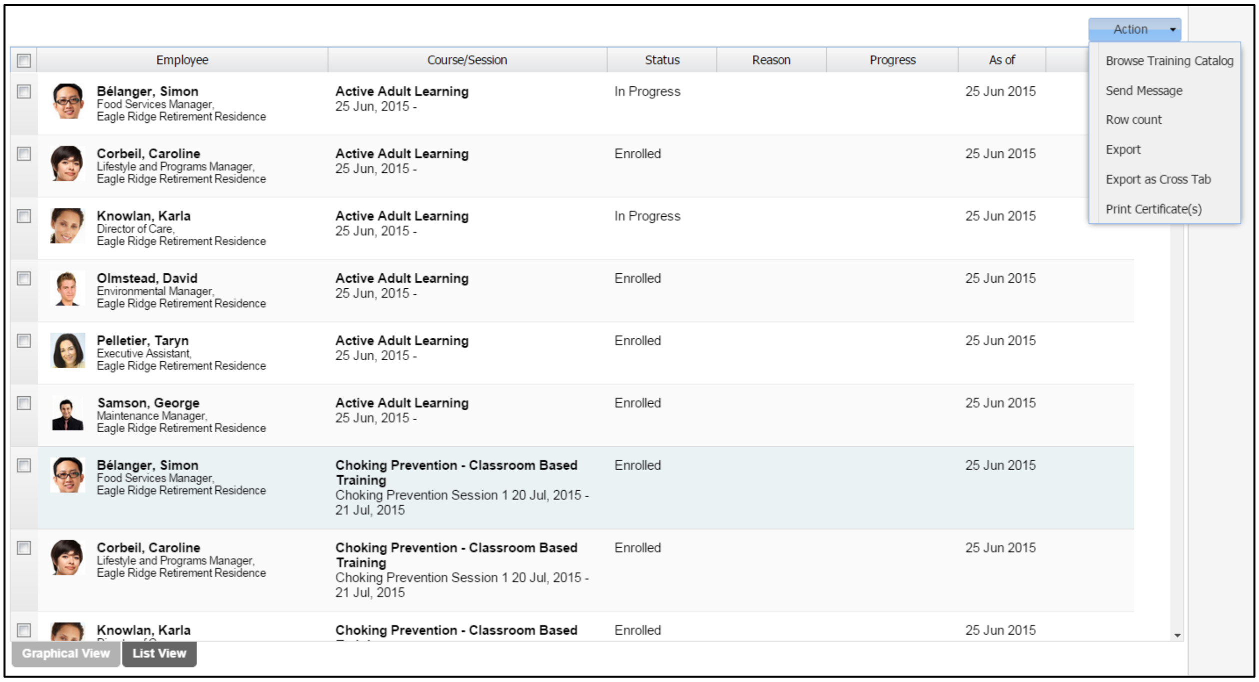
Or

Enter an employee, job classification, business unit, or select one using the drop-down option.

4. Select the **Search** button to see a graphical display of your employees' progress.



5. For a detailed view of the data in this graph, choose the *List View* tab at the bottom of the screen. This will show you the individual employee data.



6. The Action button allows you to send messages (if subscribed), print certificates, and export information to Excel for reporting purposes.

Reports Using the Team Training Tool

In the Team Training tool, you can **Export** your data to Excel.

Select **Action - Export** to create an Excel spreadsheet containing all training records displayed in your Team Training search results.

1. To export training information, the first step is to select the records to export.
   a. To select all records, choose the top checkbox.
   b. To choose specific records, select the checkboxes beside each individual training record.
2. Choose **Action – Export**

Some clients prefer to include all available values in the export, then to sort, manipulate, and delete extra information in Excel afterwards. You may find it easiest to export just the following recommended values:

i. Display Name
ii. Employee Role
iii. Course (and Course Alias if for a course not delivered through iTacit)
iv. Start and End Dates
v. Status
vi. Grade

3. Select the **Download Exported Values** button.

4. Your export is downloaded to your computer. If you are not prompted to open the file, you should be able to access it in your Downloads folder.

Example:

	A	B	C	D	H	O	P	W
1	Employee #	Last Name	First Name	Display Name	Employee Job Classification	Employee Active	Course	Provider
2	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Body Mechanics In-service 2014-15	Self-directed
3	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Choking Prevention In-service 2013-14	Self-directed
4	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Emergency Plan In-service 2013-14	Self-directed
5	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Fire Safety General In-service 2013-14	Centre for Excellence NS
6	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Fire Safety Workplace Specific In-Service 2012-13	Facility Designate
7	4374	Bbvfsohtxhjyvb	Grissn	Bbvfsohtxhjyvb, Grissn	Occupational Therapist	Y	Fire Safety Workplace Specific In-Service 2013-14	Facility Designate

The columns of information in Excel can easily be rearranged, sorted, and paired down to meet your reporting needs. For example, you could sort based on Status to see those who have completed a course, have not started (Enrolled), or are In Progress.

Select **Action – Export as Cross Tab** to create an Excel spreadsheet containing all training records grouped by employee. This document will show all employees in your search results, as well as their training progress in each course.

1. To export training information, the first step is to select the records to export.
   a. To select all records, choose the highest checkbox.
   b. To choose specific records, select the checkboxes for each individual training record.
2. Choose **Action – Export as Cross Tab**

Selecting this option will automatically download the export to your computer. If you are not prompted to open the file, you should be able to access it in your Downloads folder.

Example:

	A	B	C	D	E
1	Employee	Role	AODA Staff Training	Choking Prevention	Fall Prevention
2	Employee 1	Cook I, (Scarborough) Dietary, (Scarborough) Dietary	Enrolled	Enrolled	
3	Employee 2	Cook I, (Scarborough) Dietary, (Scarborough) Dietary	Completed (100% - Passed)	Completed (95% - Passed)	
4	Employee 3	Cook II, (Scarborough) Dietary, (Scarborough) Dietary	Enrolled	Enrolled	
5	Employee 4	Cook II, (Scarborough) Dietary, (Scarborough) Dietary	Completed (100% - Passed)	Completed (90% - Passed)	Completed (91% - Passed)

This Excel spreadsheet that has a row for each employee, with the columns as the course results. You can see if the employee has Completed the course, is In Progress, or is Enrolled. If the cell is empty, it means that the employee has not been assigned that specific course.

KNOWLEDGE PROGRAMS – Standard Use

Assign a Knowledge Program

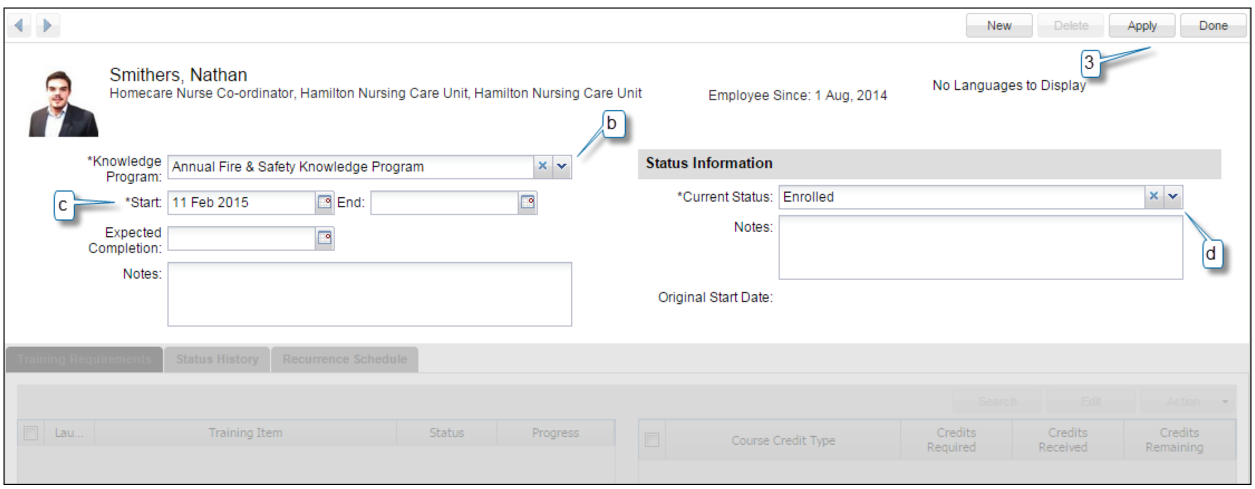
When creating a new Knowledge Program, it must be initially assigned to all existing employees in iTacit that are part of your Target Group. This is done through the Knowledge Program Manager. After this initial assignment, iTacit will automatically enroll employees if this option has been selected.

1. Select **Menu** > **Training & Education** > **Knowledge Program Manager**.

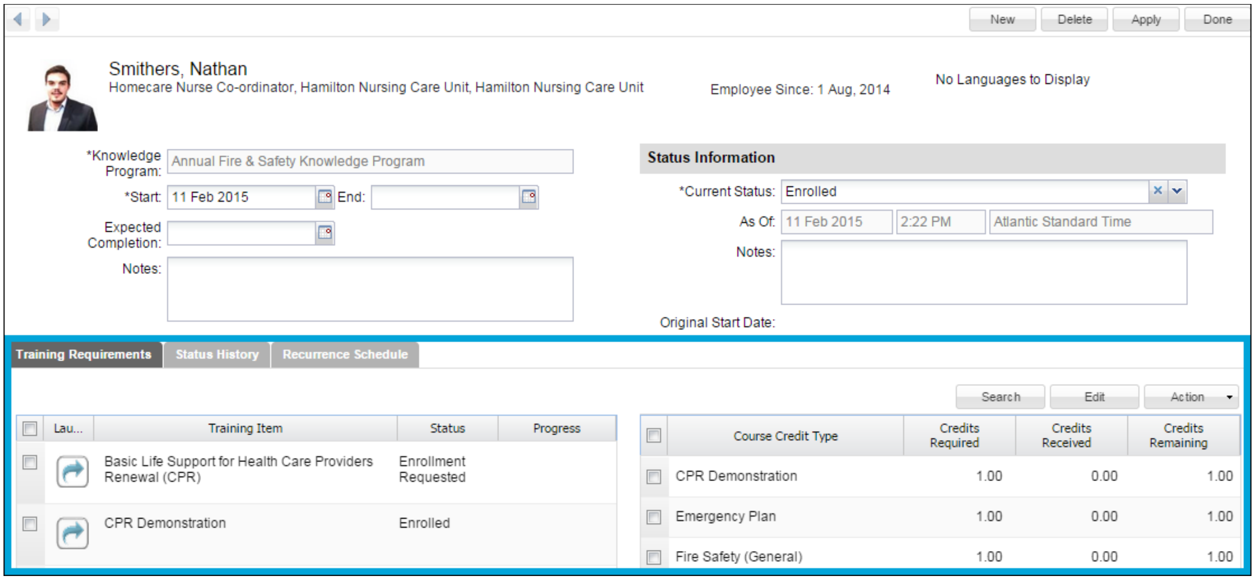
Assign a Knowledge Program to One Employee:

2. In the *Knowledge Program Manager* screen select **New** > **Knowledge Program**.
    a. Search for and select the desired employee.
    b. Select the dropdown option by **Knowledge Program** to select the desired item.
    c. Enter a **Start** date.
    d. Select the dropdown option by **Current Status** to set the desired status.

3. Select **Apply**.



Once saved, the **Training Requirements**, **Status History** and **Recurrence Schedule** of the Knowledge Program will be displayed.



4. Select **Done**.

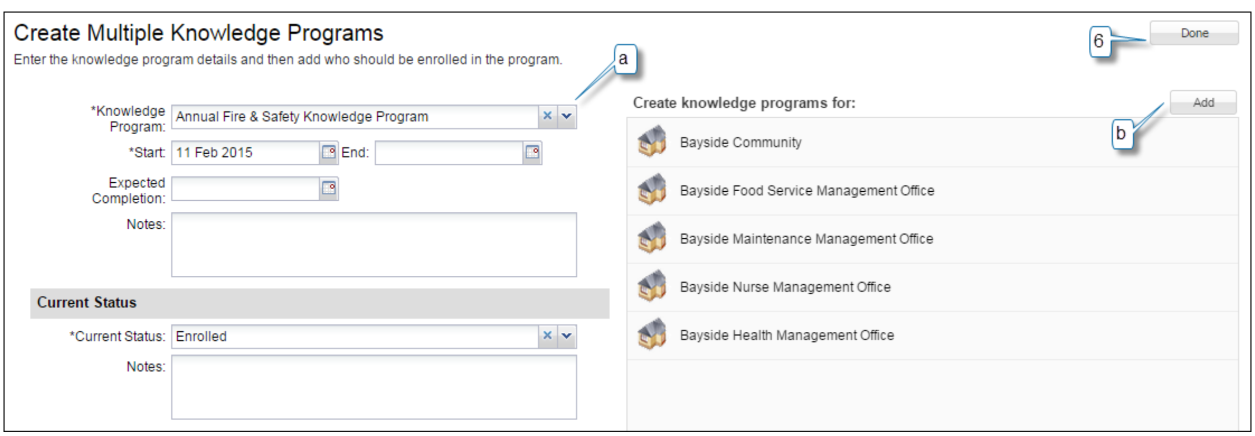
Assign a Knowledge Program to Multiple Employees:

5. In the *Knowledge Program Manager* screen select **New** > **Multiple Knowledge Programs**.

   a. Select the dropdown option by **Knowledge Program** to select the desired item.
   b. Select **Add** in *the Create knowledge programs* for section
   c. Search for and select the desire employee(s).

6. Select **Done**.

7. A **Success** window will display, select **OK**.



Report on Employee Knowledge Program Progress

Employee progress can be monitored and reported upon using the Team Knowledge Programs tool or using the Knowledge Program Manager. Information collected through these tools can then be exported to an Excel Spreadsheet to create reports.

Export Knowledge Program Information from the Knowledge Program Manager

1. Select **Menu** > **Training & Education** > **Knowledge Program Manager**.

2. Selecting **Search** in the *Knowledge Program Manager* screen will display all program information related to employee training.

   For specific training records, filter your results by desired criteria:
   - Knowledge Program
   - Status
   - Date
   - Business Unit or Job Classification
   - Etc.

   a. Place a checkmark by the desired information you wish to include in your report.

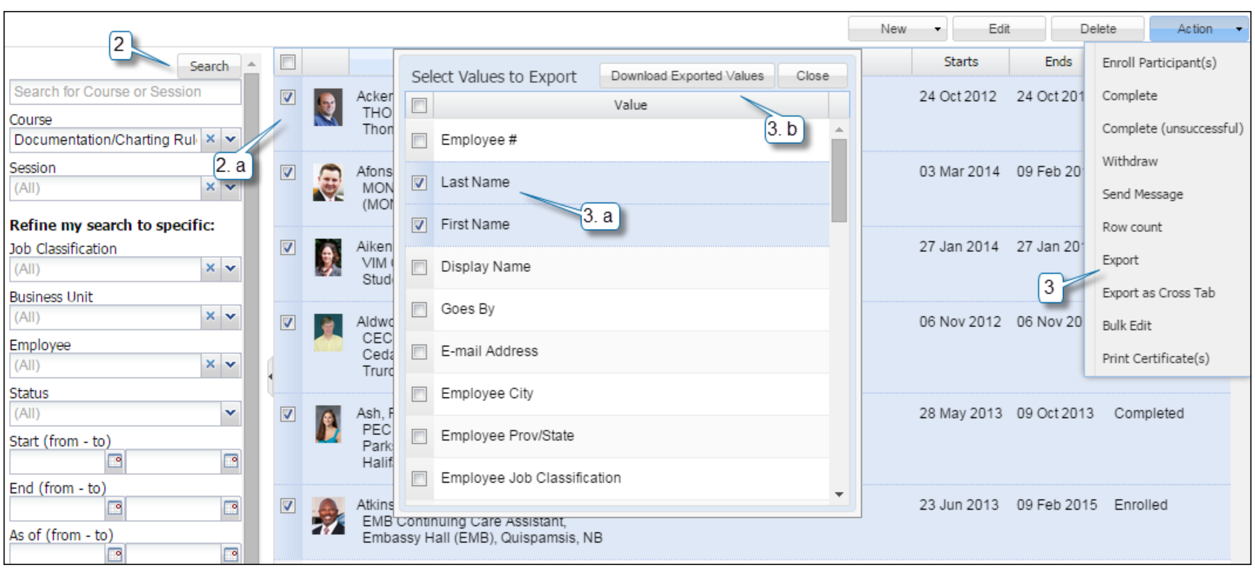
3. Select **Action** > **Export**.

   a. Place a checkmark beside the information you want to include in the **Values to Export** list provided.

Some clients prefer to include all available values in the export, then to sort, manipulate, and delete extra information in Excel afterwards.

You may find it easiest to export just the following recommended values:
- Display Name (or First and Last)
- Employee Role
- Knowledge Program
- Start and End Dates
- Status
- Grade

   b. Select **Download Exported Values**.
   c. A confirmation window will display, select **Yes**.



d. Your export is downloaded to your computer. If you are not prompted to open the file, you should be able to access it in your Downloads folder.

Example:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Employee #	Last Name	First Name	Display Name	Employee Job Classification	Employee Active	Knowledge Program	Knowledge Program Status	Start	End	Expected Completion	Credits Requ
2	4374	Samson	George	Samson, George	Maintenance	Y	Orientation / Yearly Training	Enrolled	25-Jun-15	24-Jun-16	24-May-16	
3	4375	Pelletier	Taryn	Pelletier, Taryn	Admin Assistant	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
4	4378	Olmstead	David	Olmstead, David	Laundry Manager	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
5	4379	Knowlan	Karla	Knowlan, Karla	Director of Care	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
6	4380	Corbeil	Caroline	Corbeil, Caroline	Lifestyle and Programs Manager	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
7	4381	Bélanger	Simon	Bélanger, Simon	Food Services Manager	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
8												

The columns of information in Excel can easily be rearranged, sorted, and paired down to meet your reporting needs. For example, you could sort based on Status to see those who have completed a knowledge program, have not started (Enrolled), or are In Progress.

Track Employee Progress Using the Team Knowledge Programs Tool

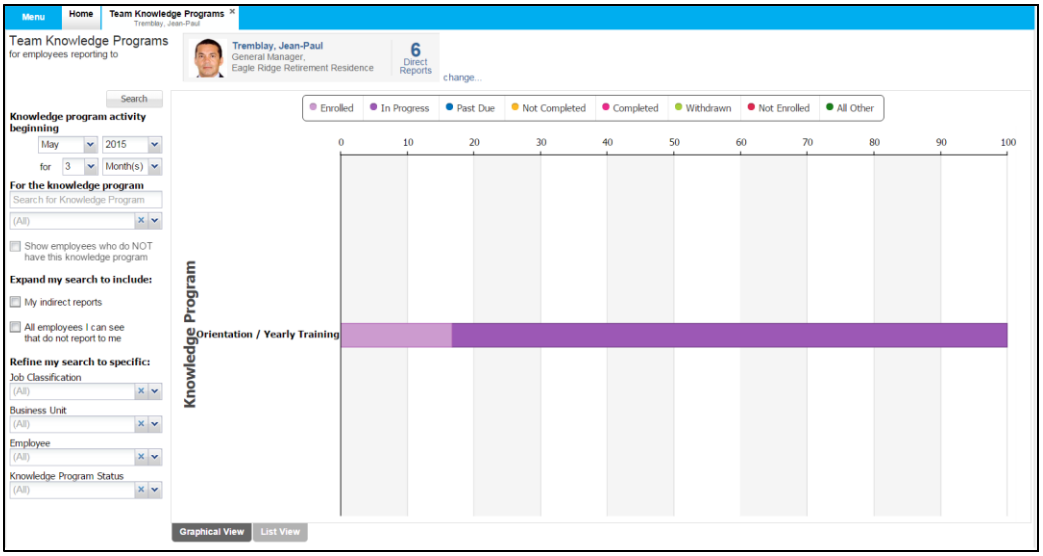
Managers can view their team's knowledge program progress directly on the dashboard through Team Knowledge Programs. This tool also allows managers to send messages (if subscribed) and export information to Excel for reporting purposes.

1. Select **Team Knowledge Programs** on your dashboard.
2. Set the training activity period. Use the Month and Year drop downs to specify the beginning of the activity period. Then select the time frame for which you want to see results.
3. Enter the knowledge program title, or choose the drop-down arrow to select.

   Or

   Enter an employee, job classification, business unit, or select one using the drop-down option.

4. Select the **Search** button to see a graphical display of your employees' progress.



5. For a detailed view of the data in this graph, choose the *List View* tab at the bottom of the screen. This will show you the individual employee data.

6. The Action button allows you to send messages (if subscribed), export information to Excel for reporting purposes, and complete a row count.

Generate a Report Using the Team Knowledge Programs Tool

In the Team Knowledge Programs tool, you can Export your data to Excel.

Select **Action - Export** to create an Excel spreadsheet containing all training records displayed in your Team Knowledge Program search results.

1. To export knowledge program information, the first step is to select the records to export.
    a. To select all records, choose the top checkbox.
    b. To choose specific records, select the checkboxes beside each individual record.
2. Choose **Action – Export**

Some clients prefer to include all available values in the export, then to sort, manipulate, and delete extra information in Excel afterwards. You may find it easiest to export just the following recommended values:

vii. Display Name
viii. Employee Role
ix. Knowledge Program
x. Start and End Dates
xi. Status
xii. Expected Completion

Select the **Download Exported Values** button.

Your export is downloaded to your computer. If you are not prompted to open the file, you should be able to access it in your Downloads.

Example:

	A	B	C	D	E	F	G	H	I	J	K	L
1	**Employee #**	**Last Name**	**First Name**	**Display Name**	**Employee Job Classification**	**Employee Active**	**Knowledge Program**	**Knowledge Program Status**	**Start**	**End**	**Expected Completion**	**Credits Requ**
2	4374	Samson	George	Samson, George	Maintenance	Y	Orientation / Yearly Training	Enrolled	25-Jun-15	24-Jun-16	24-May-16	
3	4375	Pelletier	Taryn	Pelletier, Taryn	Admin Assistant	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
4	4378	Olmstead	David	Olmstead, David	Laundry Manager	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
5	4379	Knowlan	Karla	Knowlan, Karla	Director of Care	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
6	4380	Corbeil	Caroline	Corbeil, Caroline	Lifestyle and Programs Manager	Y	Orientation / Yearly Training	In Progress	25-Jun-15	24-Jun-16	24-May-16	
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8												