

# CodeAlg Training Manager 10.0

## User Guide



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Table of Contents

- 1. Introduction .....3**
  - 1.1 Structure Of CATM ..... 3
  - 1.2 CATM Layout..... 4
  - 1.3 Contact CodeAlg..... 5
- 2. Human Resources .....6**
  - 2.1 Locations tab ..... 7
  - 2.2 Departments tab ..... 7
  - 2.3 Positions tab..... 8
  - 2.4 Employees tab..... 9
- 3. Training .....12**
  - 3.1 Courses tab ..... 12
  - 3.2 Requirements tab ..... 13
  - 3.3 Sessions tab..... 15
- 4. Reports .....17**
  - 4.1 Required/Due report page..... 17
  - 4.2 Completed report page..... 19
  - 4.3 Echo Inputs report page..... 21
- 5. Admin .....22**
  - 5.1 Preferences tab and Database Backup ..... 22
  - 5.2 Accounts tab ..... 25
  - 5.3 Sign-In-Log tab ..... 27
- 6. Notes .....28**

## 1. Introduction

CodeAlg Training Manager (CATM) was created as a simple, intuitive means for companies of all industries to compile, organize, and store their employee training records. It was built with the ISO 9001 quality standard in mind, to assist companies with the requirement to maintain readily accessible training records. It also allows companies to track course requirements and due dates for each employee to ensure timely training; in accordance with their job description.

CATM originated in 1998 in Microsoft Access. Its popularity grew with small to medium sized companies as a means to get those paper records out of the filing cabinets and into the computer. In the age of the internet, many of our clients have requested a web/browser based version of the CATM. CATM is now written in PHP/MySQL/jQuery/JavaScript for the browser. This eliminates the need to have MS Access on the local machine. Anyone that has access to the internet can now use our Training Manager. It also allows for a multi-user environment for team collaboration in maintaining and retrieving training requirements and records.

**Note** that you must have **JavaScript** enabled in your browser to run the CATM.

When CATM opens, the user will be presented with the login screen:



figure 1

If you have forgotten your password, click the link under the “Login” button. On the subsequent form, retype the username and select the preferred method of contact; email or text message. If you select email, an email will be sent to the email address on file with a link to the password reset page. If you select text message, a text message will be sent to the cell phone on file with a code to be typed in on the reset password page. If you have forgotten your username, contact your admin user at your company.

### 1.1 Structure Of CATM

CATM has 4 sections; Human Resources, Training, Reports, and Admin. Human Resources is where you will input employee information and company structure (departments, positions, and locations ). The Training section is where you will input the required training either by position, department, or all company employees and, of course, the training sessions and completed training of each employee. The Report section contains database lookup functionality to retrieve the records for a given employee(s) based on various specified criteria. The final section is the Admin section where user accounts are created and maintained to control the accessibility/integrity of the database. Each of these are explained in detail in later sections of this guide.

## 1.2 CATM Layout

The CATM layout consists of a left (collapsible) panel containing the section and tab navigation of the program and a main panel that comprises the data entry page.

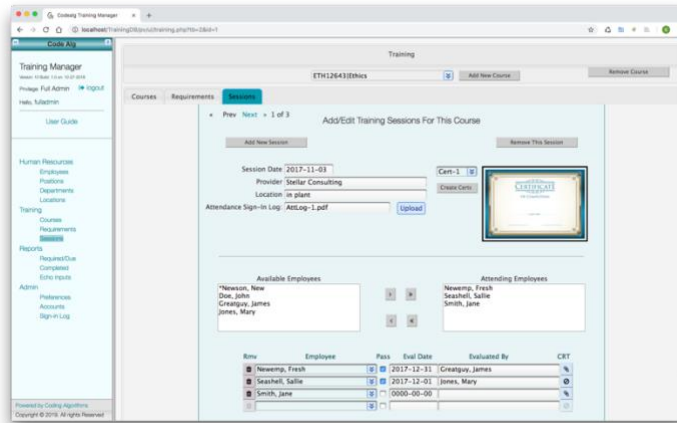


figure 1.2a

The upper area of the left panel (see figure 1.2b) displays the program name, version/build, user name and privilege level, logout button, and a link to display the user guide, as a PDF, in a separate window.

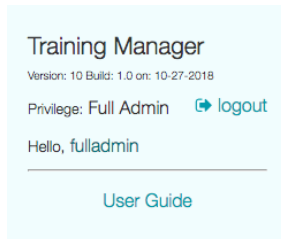


figure 1.2b

The lower area (see figure 1.2c) contains the navigation links for the four sections and their respective tabs/subsections. If a link or tab is greyed out, it means that the user does not have permission to enter that section or tab. User permissions are set on the Accounts page by “Admin” and “Full Admin” account holders. This is explained in detail in the Admin section of this guide.



figure 1.2c

The main panel will display the data entry form(s) for whichever section/tab is selected from the navigation panel. Each of these are discussed in detail in later sections of this guide.



## 1.3 Contact CodeAlg

We are Coding Algorithms.

You can contact us at [support@codealg.com](mailto:support@codealg.com) or login to your account at <https://www.codealg.com> and create a ticket under Support ->Tickets. Click "Open Ticket".

## 2. Human Resources

The Human Resources page contains four tabs; Employees, Positions, Departments, and Locations. While the Locations tab input is optional, the other three are essential for establishing training requirements for employees according to their position (job) or department.

When first starting out, it is best to start with the top of the company structure and work your way down. In other words, start by inputting the locations (if desired), then the departments, then input the positions, and last, the employees. This way, the positions and departments will be in the database and ready to be assigned to the employees upon input. By the same reasoning, start at the top of the organization chart when inputting the employees (i.e., the CEO/President, Management, then subordinates). That way, the supervisors will already be in the database when you input their subordinates and you can assign a supervisor to each employee. Although, you can always skip the supervisor input and enter that at a later time.

All of the tabs within this page are laid out in a similar fashion with a select dropdown box containing existing records and an option to create a new one. For convenience, there is also a button, to the right of the dropdown, to create a new one. This will be greyed out if the user does not have permission to edit records. In the upper right corner there is a remove button. This will be greyed out if there is no record selected or the user does not have permission to delete records. In addition, there are various lookup/data verification buttons to help flush out any data entry errors. These will be discussed in more detail later in this guide.

All date input boxes can be double clicked to display a calendar for easy entry.

At the bottom of each tab, there are three buttons; Save, Cancel, and Reset. The Save button is used to save the entered or modified data to the database. This **MUST** be clicked or the data will **NOT** be saved. This will be greyed out if the user does not have permission to edit records. The Cancel button will abandon changes and return to the default page with no record selected. The Reset button will reset any (except the list boxes) changed fields on the form but remain on this page with this record displayed as it is in the database. If you change any field in the input form and attempt to leave the page before saving, a dialog will appear to confirm that you intend on abandoning your changes.

***Note:*** you must click on the **Save** button to save the data any time you enter or change data.

## 2.1 Locations tab

The Locations are optional and really only here for display reasons. They are not used for determining requirements or sessions. They were added to the CATM by request from our clients with multiple sites so that they may display the records by site/location. You may input all of your locations, just one location, or none at all. It's up to you.

Since locations are optional, it doesn't really matter when you input them. If you choose to input them first, then you can select one ( or more, as an employee can work at more than one location) for the employee on the Employees tab as you enter the employee. Or, after you have entered all of the employees you can return here to a location and use the multi-enter selection box at the bottom of the locations tab to select all of the employees that work at this location. Use the directional buttons in the middle to move the names back and forth between boxes. The box on the left is the employee list to choose from and the box on the right is the list of employees working at this location. The box works like most with shift key allowing for contiguous multiple selection and the control/command key allowing you to skip over items. After selecting, click the > button to move the items to the "Employees at THIS Location" box on the right. The >> button will move all items. The left pointing arrow buttons below these will move the items back into the left box.

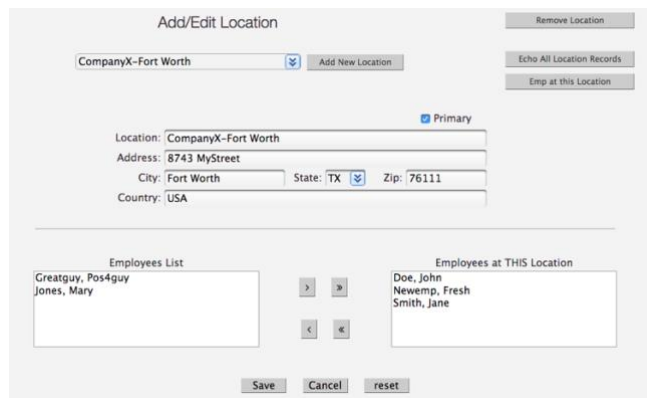


figure 2.1

The "Primary" checkbox, at the top of the form, is used to determine default location to help facilitate the input of locations for employees on the Employees tab. If only one location is entered, it will be the primary.

When all data has been entered into the forms, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel, simply click the Cancel button or leave the tab or form without saving.

The lookup buttons to the right of the input will help verify the data entry. The "Echo All Location Records" button will produce a PDF report of all locations in the database. The "Emp at this Location" button will produce a PDF report of all employees at this location. To save the report, click the download button in the upper right corner of the PDF window. To print the report, click the print button; also in the upper right corner. To return from the report, press the back button on your browser.

## 2.2 Departments tab

The Departments tab is where you will input the departments within the company. These will be associated with the employee by position at the bottom of the Employees tab. They can be used to set requirements of training by an entire department.

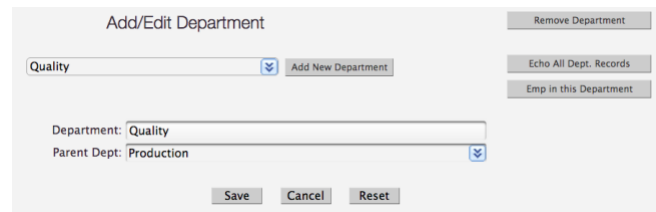


figure 2.2

Once again, it is recommended that you start with the top level department so that you can specify a parent department as you enter each one. Note that a parent department is not required (i.e., the top level does not have a parent).

When all data has been entered into the form, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel, simply click the Cancel button or leave the tab or form without saving.

The lookup buttons to the right of the input will help verify the data entry. The “Echo All Department Records” button will produce a PDF report of all departments in the database. The “Emp in this Department” button will produce a PDF report of all employees in this department (note the assignment is done in the Employees tab). To save the report, click the download button in the upper right corner of the PDF window. To print the report, click the print button; also in the upper right corner. To return from the report, press the back button on your browser.

## 2.3 Positions tab

The Positions tab is where you enter the jobs/positions within the company. Enter the name of the position and a labor grade (optional). Also optional is the job description file upload. Here you can upload a PDF of the job description for this position for quick referral and organization. Once uploaded, you can double click on the input field to open the file in another window for viewing. It does not affect the training data, but is a feature that several of our clients have requested. In addition to this, the individual, employee signed job descriptions can be uploaded and stored with the position/employee record in the Employees tab. *Note that the job description file is stored on the server and will be deleted upon removal of the position with which it is associated.*

When all data has been entered into the form, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel simply click the Cancel button or leave the tab or form without saving.

The lookup buttons to the right of the input will help verify the data entry. The “Echo All Position Records” button will produce a PDF report of all positions in the database. The “Emp in this Position” button will produce a PDF report of all employees assigned to this position (note the assignment is done in the Employees tab). To save the report, click the download button in the upper right corner of the PDF window. To print the report, click the print button; also in the upper right corner. To return from the report, press the back button on your browser.



figure 2.3

## 2.4 Employees tab

The employees are entered into the database on this tab.

figure 2.4a

The basic input form is directly below the employee selection box (see figure 2.4b). Enter the name, email, and hire date (double click for calendar). The employee number is optional. The active checkbox should be checked by default, but if it isn't, do so now.

figure 2.4b

To the right of the basic input form is the Location selection dropdown box (see figure 2.4c). Here you can select the location where this employee works. If the employee works at multiple locations, add as many as needed. Keep in mind that this is optional. No location is required. If Locations have been created in the Locations tab, the one marked Primary will be selected here by default. You can override this by selecting another. To remove a location, click the trash can button on the left of the row. This will be greyed out if the user does not have permission to delete records.

figure 2.4c

Below the basic input form, is the position selection (see figure 2.4d). This set of dropdown boxes allows you to select the position(s) that this employee holds in the company along with the department, the supervisor, the date started in this position, and the competency of the employee at this position (used for ISO 9001). The date started will default to the hire date. Notice that each employee can “wear many hats”. Each row of data contains a separate position for the employee. Add a record for each position that the employee holds. To remove a position, click the trash can button on the left of the row. This will be greyed out if the user does not have permission to delete records.

Rmv	Position	Supervisor	Department	DateStarted	Competency	JD
	pos3	▼ Doe, John	▼ Production	▼ 1995-05-05	Qualified	▼
	pos2	▼ Jones, Mary	▼ Quality	▼ 2018-10-09	Trainee	▼
		▼	▼	▼		▼

figure 2.4d

The button labeled “JD”, to the right of the “Competency” input, will open a popup that allows you to upload the employee’s signed job description for this position (see figure 2.4e). On the popup, click “Upload” and select the file to be uploaded. Click “open” and the file name will be displayed in the input box on the left of the upload button. Then click the “X” in the upper right corner of the popup to close it. After the popup is closed, you must click the “Save” button to complete the upload process. The file will be given a new name comprised of the employee and position information and stored in a folder on the server. *Note that this file will be deleted upon removal of the record of this position for this employee, removal of this position from the database, or removal of this employee from the database.* The icon on the button will then change from a “no” symbol to a paperclip; indicating that a file is attached. You can view the file, replace it, print it, delete it (by clicking trash can next to upload button), and/or download it at any time by pressing the paperclip button.

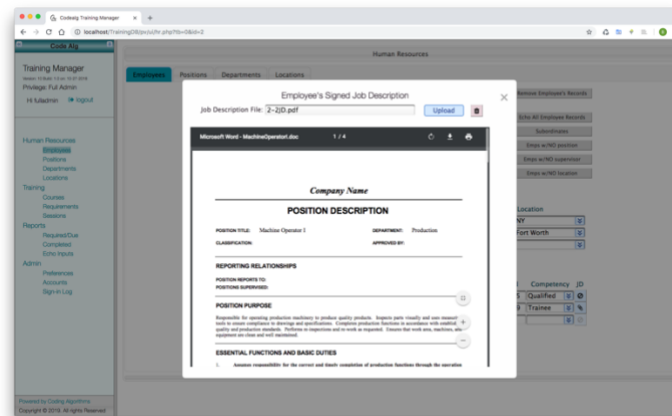


figure 2.4e

When all data has been entered into the forms, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel, simply click the Cancel button or leave the tab or form without saving.

The lookup buttons to the right of the input (see figure 2.4e) will help verify the data entry. The “Echo All Employee Records” button will produce a PDF report of all employees in the database. The “Subordinates” button will produce a PDF report of all employees immediately subordinate to this employee. To save the report, click the download button in the upper right corner of the PDF window. To print the report, click the print button; also in the upper right corner. To return from the report, press the back button on your browser.

The “Emps w/NO position” button will create a popup list of employees that have no position set for them. All employees should have at least one position. This will catch those that don’t.

The “Emps w/NO supervisor” button will create a popup list of employees that have a position but no supervisor set for this position. Setting a supervisor for the position is not required (e.g., the top person in the company won’t have one), but this will alert you to the fact so that you can verify that it is intentional.

The “Emps w/NO location” button will create a popup list of employees that have no location set for them. Setting a location for the employee is not required, but this will alert you to the fact so that you can verify that it is intentional.

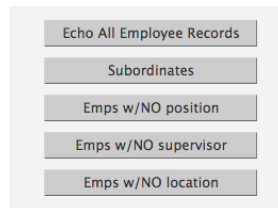


figure 2.4e

To remove an employee, click the “Remove Employee’s Records” button in the upper right corner of the tab. This will result in a warning of the consequences of deleting an employee. If you still want to remove the employee and all of their associated records, click OK. If not, click Cancel.

A better way to handle employees that no longer work for the company, is to deactivate them by unchecking the “Active” checkbox at the top of the input form (see figure 2.4b). This will remove them from view (unless “Show In-Active Employees” is checked on Preferences tab) while maintaining associated records. This will also be helpful in the event that the employee is re-hired in the future. However, the choice is yours.

## 3. Training

The Training page contains three tabs; Courses, Requirements, and Sessions. This is the heart of the Training Manager; as it consists of the course list, the training session entry (i.e., training completed entry), and the setting of requirements to obtain the training necessary to perform the job that the employees were hired to do. It is laid out a little different from the Human Resources section because it only has one list; courses. All of the tabs on this page pertain to a specified course and, therefore, this dropdown select list is located at the top, above all of the tabs, along with the “Add New Course” and “Remove Course” buttons.

Once the employees, positions, and departments have been entered in the Human Resources section, you can begin data entry for the training records in this section. Start out by entering the courses. After these are in the database, you can enter sessions and/or requirements for them.

All date input boxes can be double clicked to display a calendar for easy entry.

At the bottom of each tab, there are three buttons; Save, Cancel, and Reset. The Save button is used to save the entered or modified data to the database. This MUST be clicked or the data will NOT be saved. This will be greyed out if the user does not have permission to edit records. The Cancel button will abandon changes and return to the default page with no record selected. The Reset button will reset any (except the list boxes) changed fields on the form but remain on this page with this record displayed as it is in the database. If you change any field in the input form and attempt to leave the page before saving, a dialog will appear to confirm that you intend on abandoning your changes.

**Note:** you must click on the **Save** button to save the data any time you enter or change data.

To remove a course from the database, simply click on the “Remove Course” button in the upper right corner of the page. You will be shown a confirmation dialog to confirm or cancel the delete. This will be greyed out if the user does not have permission to delete records.

To enter data in these tabs, first either select an existing course from the dropdown list or add a new course by clicking the “Add New Course” button to the right of the dropdown box. As you move between tabs the course will remain selected.

### 3.1 Courses tab

The Courses tab is where you will enter all of the courses that are offered by your company as well any outside courses that the employees take.

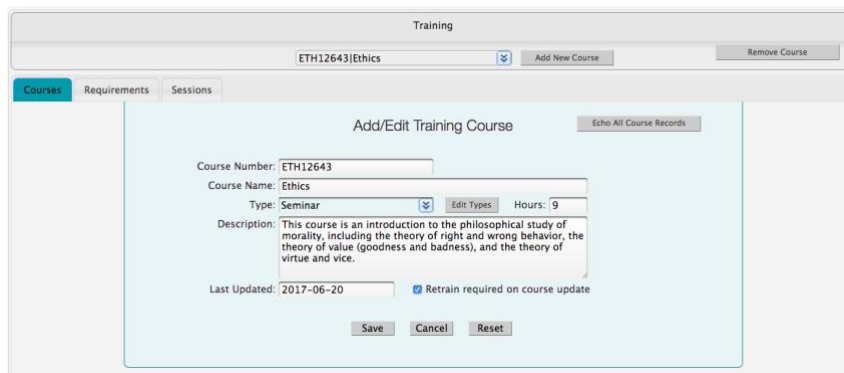


figure 3.1

Course Number is optional and can be turned on/off in the Preferences tab of the Admin section.

Enter a name for the course. This is actually the only essential item.

The Type field is optional but helps describe the course. To enter a type, you must choose from the dropdown list. To add to or edit this list, click the button to the right of the field; "Edit Types". This will take you to the "Edit Training Types" page. Note, you must save your changes to the courses form first.

You may enter the number of hours for this course as well as a description.

Last Updated is the date that the course was created or updated. This is used to determine training due date if the course is required to be retaken after an update to the course. This is indicated by the checkbox to the right of the date field.

When all data has been entered into the forms, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel simply click the Cancel button or leave the tab or form without saving.

## 3.2 Requirements tab

After the courses and employees are in, you can define requirements for employees to take the courses. Simply click "Add New Requirement" and a blank form will be displayed. There can be multiple requirements for any given course. If there are more than one, a page navigation will appear at the top and bottom of the form to navigate through each one.

You can define requirements by time after hire, by specified date, or, if both of these are left blank, immediately due. If both contain data, the specific date will be used.

The Repetitive checkbox is used to specify that this course is required to be taken again every so often. The interval is specified in the "Retrain every" box.

You can set a requirement that all employees must take this course by checking the "required for all.." checkbox. This is useful for courses such as Ethics, Benefits training, ISO Awareness... You can exempt employees from this requirement using the list boxes below. This allows you to exclude the instructor of the course if he/she is an employee. Or, you might have a course that is required for all employees except upper management. Use the box on the left (Available Employees) to select all that are exempt. The box works like most with shift key allowing for contiguous multiple selection and the control/command key allowing you to skip over items. After selecting, click the > button to move the items to the "Exempt" box on the right. The >> button will move all items. Of course you probably won't be using this button on this form because you're not likely to create a requirement for all and then exempt all ☺. The left pointing arrow buttons below these will move the items back into the left box. (see figure 3.2a)

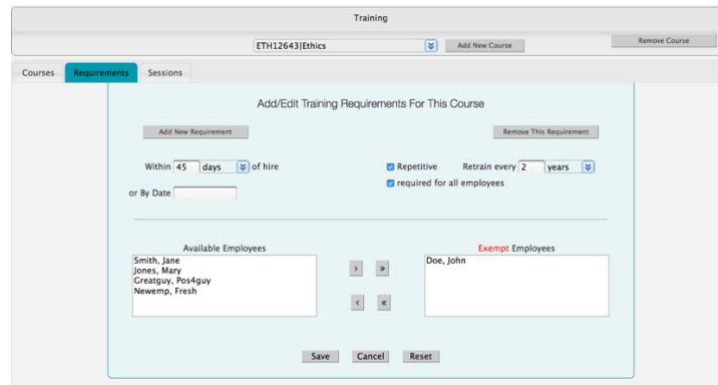


figure 3.2a

If the “required for all..” checkbox is not checked (see figure 3.2b), there will be two sets of list boxes in the bottom of the input form. These contain positions and departments. This is where you will specify that this course is required for all employees in one or more positions and/or departments.

If you have a situation where a course is required by a handful of (not all or most) employees not relating to a position or department, the best thing to do is to create a new position and assign each of them to this new position. Then set the requirement here for the position (e.g., create pos: Internal Auditor, set requirement for Internal Auditor course).

Select any and all positions that require this training from the left box labeled “Available Positions” and move them to the right box labeled “Assigned/Selected Positions” as described in the previous paragraph. Do the same for any departments if there is a requirement for all employees of a department to take the course.

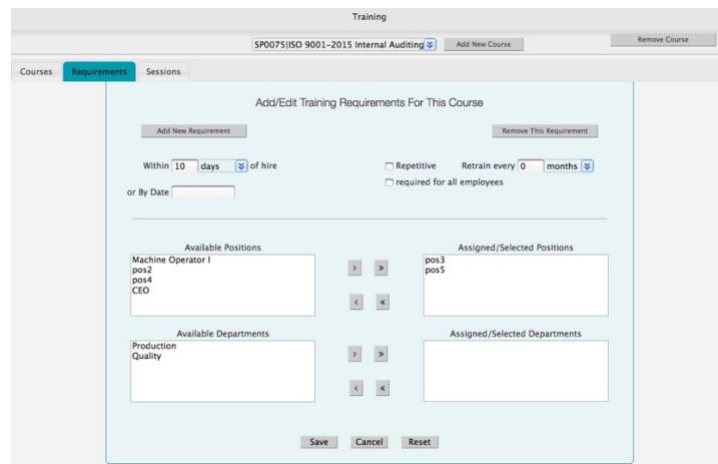


figure 3.2b

When all data has been entered into the forms, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel simply click the Cancel button or leave the tab or form without saving.

To remove a requirement from the database, simply click on the “Remove This Requirement” button in the upper right corner of the form. You will be shown a confirmation dialog to confirm or cancel the delete. This will be greyed out if the user does not have permission to delete records.

### 3.3 Sessions tab

After the courses and employees are in, you can enter training sessions for the courses. Simply click “Add New Session” and a blank form will display. There can be multiple sessions for any given course. If there are more than one, a page navigation will appear at the top and bottom of the form to navigate through each one.

The session (or class) entry consists of the date the session took place, the provider/instructor (optional), the location (optional), and the ability to upload the session student attendance log/sign-in sheet (optional). *Note that the attendance log/sign-in sheet file is stored on the server and will be deleted upon removal of the session and/or course with which it is associated.*

This tab also has a list of employees attending the training session. Select the employees (the students) that attended the session from the left box labeled “Available Employees”. The box works like most with shift key allowing for contiguous multiple selection and the control/command key allowing you to skip over items. After selecting, click the > button to move the items to the “Attending” box on the right. The >> button will move all items. The left pointing arrow buttons below these will move the items back into the left box.

The table at the bottom of the form can alternately be used to enter the students. This table also contains the pass/fail status of the student, an evaluation date and evaluator, for compliance with ISO 9001 requirement of evaluating the effectiveness of the training, as well as an upload for the student’s certificate of completion. If you used the list box above to enter the students, simply Save the session with the “Save” button and then return here to find each of the students now in this table. Now you can check the Pass box for each student that successfully completed the course (or uncheck for those that did not pass) and add the remaining data.

To remove a student from the session, either move the student from the “Attending Employees” box back to the “Available Employees” box and click “Save” or click the trash can button next to the student in the table at the bottom. These buttons will be greyed out if the user does not have delete privilege.

Once the students have been entered and the session has been saved with the Save button at the bottom, certificates of completion can be generated for each passing student by clicking the button, “Create Certs”, on the right of the input form, in the upper section. Use the dropdown box above the button to select which cert template you would like to use. There is a preview of the selected cert in the window to the right. Click the button, “Create Certs”, to produce a PDF of certificates filled out with the course name, student name, and session date. To add a signature to them, you can print them. To save the certs, click the download button in the upper right corner of the PDF window. To print the certs, click the print button; also in the upper right corner. You can also use the print button to save each cert to its own file by printing each page to PDF. To return from the PDF, press the back button on your browser.

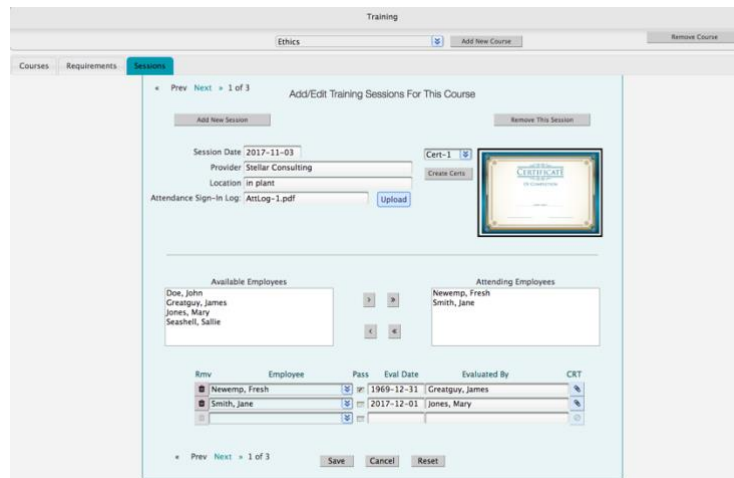


figure 3.3

The button labeled “CRT”, to the right of the “Evaluated By” input, will open a popup that allows you to upload the employee’s signed certificate for this session (see figure 3.3a). On the popup, click “Upload” and select the file to be uploaded. Click “open” and the file name will be displayed in the input box on the left of the upload button. Then click the “X” in the upper right corner of the popup to close it. After the popup is closed, you must click the “Save” button to complete the upload process. The file will be given a new name comprised of the employee and session information and stored in a folder on the server. *Note that this file will be deleted upon removal of the record of this employee from the session, removal of this session from the database, or removal of this employee from the database.* The icon on the button will then change from a “no” symbol to a paperclip; indicating that a file is attached. You can view the file, replace it, print it, delete it (by clicking trash can next to upload button), and/or download it at any time by pressing the paperclip button to reopen the popup.

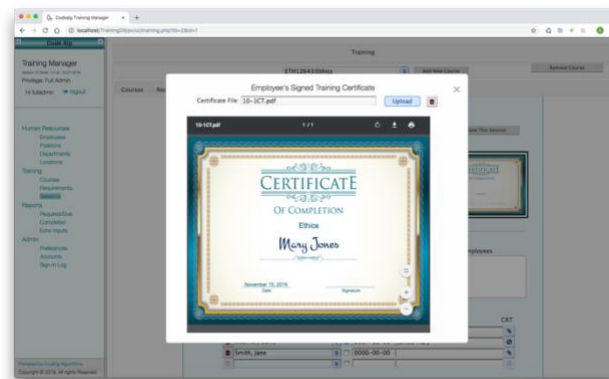


figure 3.3a

When all data has been entered into the forms, click Save at the bottom to commit these entries to the database. This will be greyed out if the user does not have permission to edit records. To cancel simply click the Cancel button or leave the tab or form without saving.

To remove a session from the database, simply click on the “Remove This Session” button in the upper right corner of the form. You will be shown a confirmation dialog to confirm or cancel the delete. This will be greyed out if the user does not have permission to delete records.



## 4. Reports

The Reports section contains three subsections/pages; Required/Due, Completed, and Echo Inputs. The Required/Due page provides database lookup functionality for retrieving due dates of required training by a specified employee (or all), a specified position (or all), a specified department (or all), or a specified course (or all). The Completed page provides database lookup functionality for retrieving training completed by a specified employee (or all), a specified department (or all), or a specified course (or all). The Echo Inputs page is used to verify data entry and produce a list of employees, positions, departments, locations, and courses.

All of the reports are PDFs that can be saved (downloaded) or printed.

To save the reports, click the download button in the upper right corner of the PDF window. To print the reports, click the print button; also in the upper right corner. To return from the PDF, press the back button on your browser.

All reports have a header that includes the report title and date it was generated as well as a company logo. By default, the logo will be our company logo for CodeAlg. You can upload your company logo for the reports on the Admin->Preferences page. Note the supported formats are JPEG, PNG, and GIF. The resulting logo will be about 120px X 90px. So, be sure your logo will scale to this size.

### 4.1 Required/Due report page

The Required/Due page generates reports of the training required and due date for employees.

The Required/Due page contains four tabs; by Employee, by Position, by Department, and by Course. All of these tabs look identical. The difference is in the content of the selection dropdown listbox on each tab. The dropdown on the “by Employee” tab will contain employees to choose from. The dropdown on the “by Position” tab will contain positions to choose from. And, the others follow the same pattern. If no employee, position, department, or course is selected, it will report on **all** employees, positions, departments, or courses, depending on the tab that you are on.

The rest of the tab contains criteria for filtering the returned data based on dates. All date input boxes can be double clicked to display a calendar for easy entry. It will use the filters in reverse order from how they appear on the tab. In other words: it will use “In the Next...” filter, if it is set. If not, it will use “Before Date” filter, if set. If not, it will use “Between Date” filter, if set. If all is blank, it will report data for all dates.

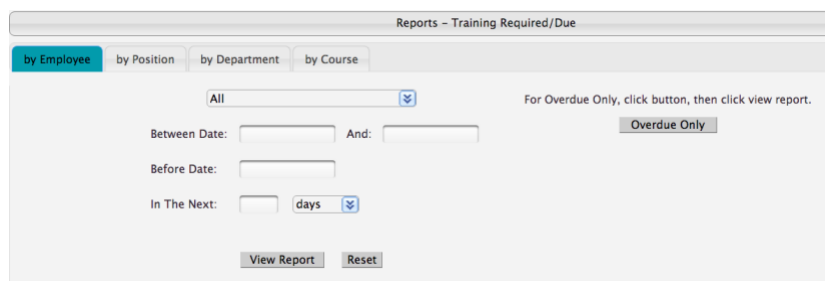
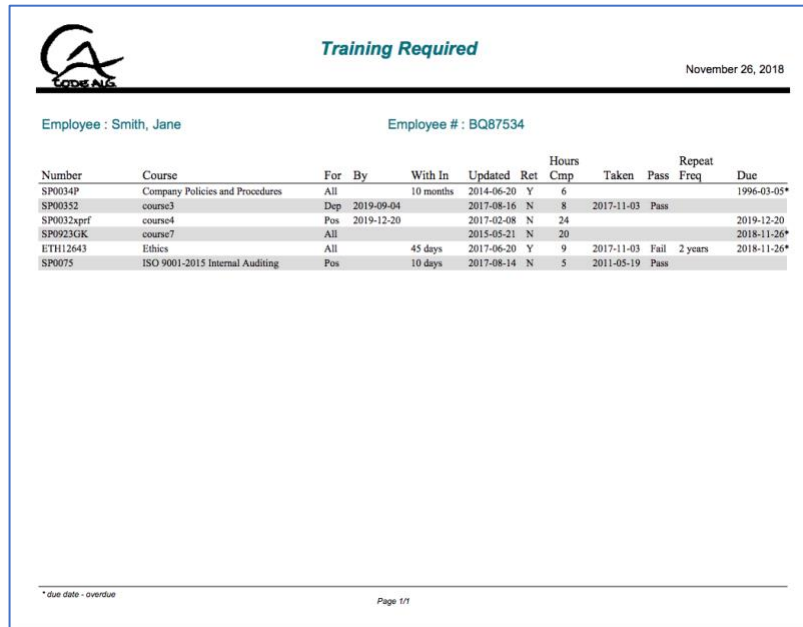


figure 4.1

### 4.1.1 By Employee tab



Number	Course	For	By	With In	Updated	Ret	Hours	Taken	Pass	Repeat	Due
SP0034P	Company Policies and Procedures	All		10 months	2014-06-20	Y	6				1996-03-05*
SP00352	course3	Dep	2019-09-04		2017-08-16	N	8	2017-11-03	Pass		
SP0032xprf	course4	Pos	2019-12-20		2017-02-08	N	24				2019-12-20
SP0923GK	course7	All			2015-05-21	N	20				2018-11-26*
ETH12643	Ethics	All		45 days	2017-06-20	Y	9	2017-11-03	Fail	2 years	2018-11-26*
SP0075	ISO 9001-2015 Internal Auditing	Pos		10 days	2017-08-14	N	5	2011-05-19	Pass		

\* due date - overdue

Page 1/1

figure 4.1.1

This report shows the training that is required for employee Jane Smith. After the name of the course, it shows the source of the requirement. In other words why it is required for her.

In this case, the first course, “Company Policies and Procedures”, is required for all employees within 10 months of hire. It is marked overdue by the \* next to the due date because she hasn’t taken it yet and, according to the due date, she must have been hired 10 months prior to March of 1996.

“Course4” is required for her because of her position (it is required for all employees in her position). And, it is required by December 20, 2019. She hasn’t taken this one yet either, but it is not yet overdue.

The other columns of the report show when the course was updated last, if retraining is required after an update, the course hours, when it was taken (if it was), if she passed, and how often it is required (if it is repetitive), and finally, the due date. And, as stated in the example, overdue status is indicated with an asterisk.

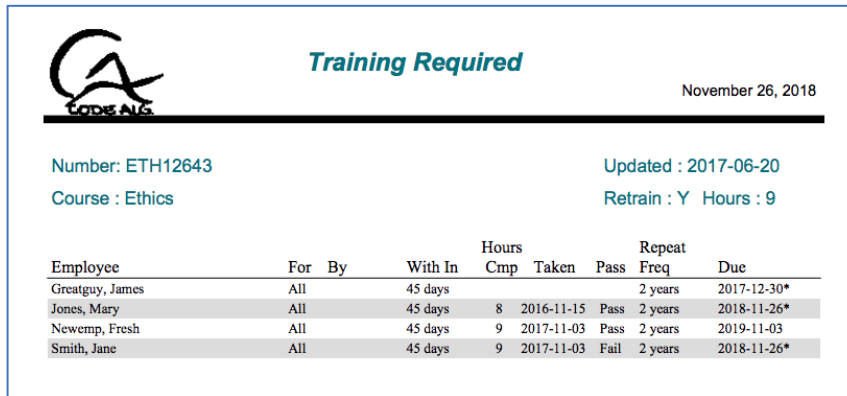
### 4.1.2 By Position tab

This report is the same as the “By Employee” report (section 4.1.1) except that it is sorted by position; displaying each employee in the position specified ( or each position in turn if All is specified).

### 4.1.3 By Department tab

This report is the same as the “By Employee” report (section 4.1.1) except that it is sorted by department; displaying each employee in the department specified ( or each department in turn if All is specified).

#### 4.1.4 By Course tab



**Training Required** November 26, 2018

---

Number: ETH12643 Updated : 2017-06-20  
 Course : Ethics Retrain : Y Hours : 9

Employee	For	By	With In	Hours		Pass	Repeat Freq	Due
				Cmp	Taken			
Greatguy, James	All		45 days				2 years	2017-12-30*
Jones, Mary	All		45 days	8	2016-11-15	Pass	2 years	2018-11-26*
Newemp, Fresh	All		45 days	9	2017-11-03	Pass	2 years	2019-11-03
Smith, Jane	All		45 days	9	2017-11-03	Fail	2 years	2018-11-26*

figure 4.1.4

This report has the same data as the “By Employee” tab but it lists the employees that are required to take the specified course (or each course in turn if All is specified).

## 4.2 Completed report page

The Completed page generates reports of the training completed for employees.

The Completed page contains three tabs; by Employee, by Department, and by Course. All of these tabs look identical. The difference is in the content of the selection dropdown listbox on each tab. The dropdown on the “by Employee” tab will contain employees to choose from. The dropdown on the “by Department” tab will contain departments to choose from. And, the dropdown on the “by Course” tab will contain courses to choose from. If no employee, department, or course is selected, it will report on **all** employees, departments, or courses, depending on the tab that you are on.

The rest of the tab contains criteria for filtering the returned data based on dates. All date input boxes can be double clicked to display a calendar for easy entry. It will use the filters in reverse order from how they appear on the tab. In other words: it will use “In the Last...” filter, if it is set. If not, it will use “Since Date” filter, if set. If not, it will use “Between Date” filter, if set. If all is blank, it will report data for all dates.

In addition, there is a checkbox, “Return All Sessions”, to specify if you want all sessions of a given course that was taken by the employee or just the last one. By default it will return only the last time the course was taken. If checked, it will return every time the course was taken.

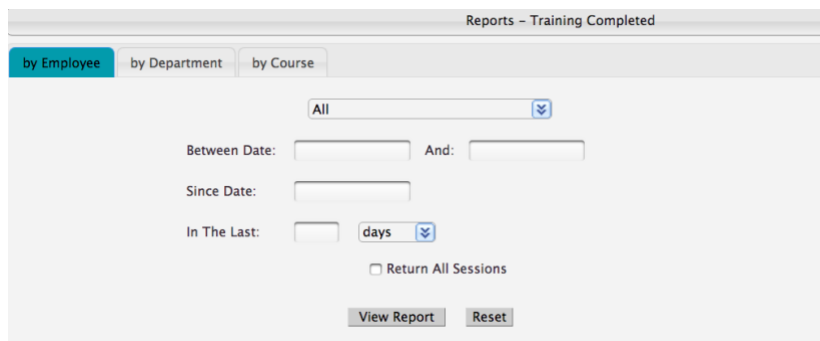


figure 4.2a

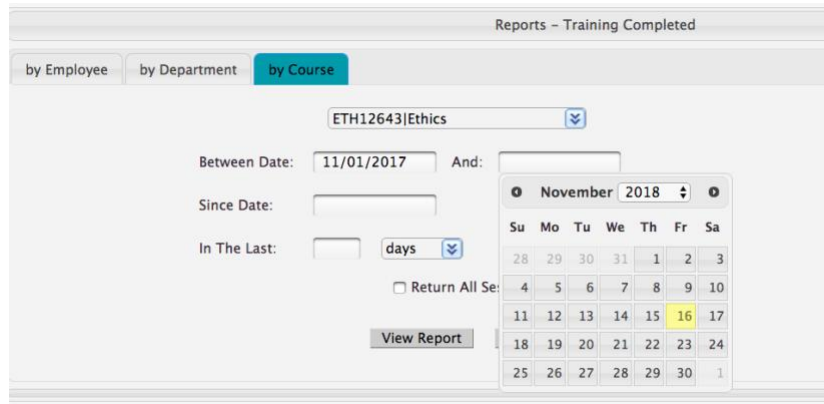
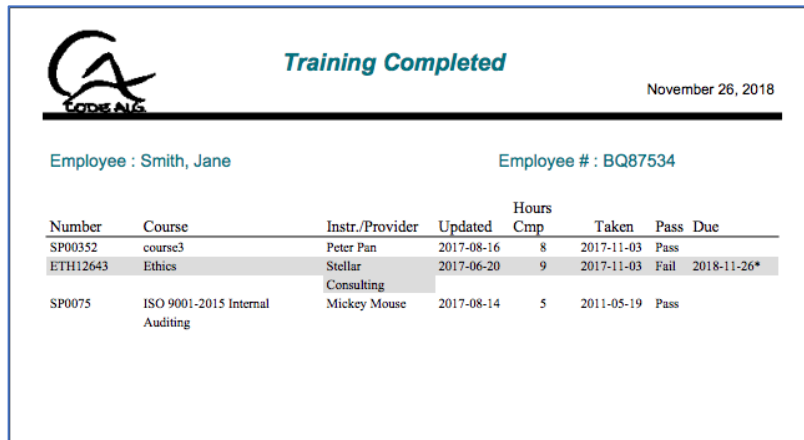


figure 4.2b

## 4.2.1 By Employee tab



**Training Completed**  
November 26, 2018

Employee : Smith, Jane      Employee # : BQ87534

Number	Course	Instr./Provider	Updated	Hours			Pass	Due
				Cmp	Taken	Pass		
SP00352	course3	Peter Pan	2017-08-16	8	2017-11-03	Pass		
ETH12643	Ethics	Stellar Consulting	2017-06-20	9	2017-11-03	Fail	2018-11-26*	
SP0075	ISO 9001-2015 Internal Auditing	Mickey Mouse	2017-08-14	5	2011-05-19	Pass		

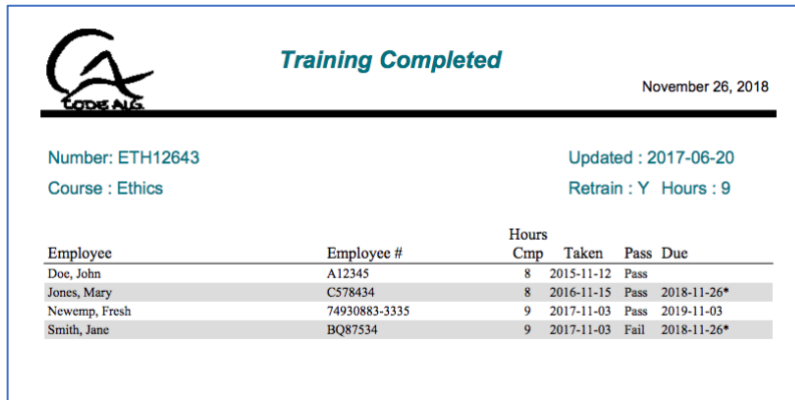
figure 4.2.1

This report shows the training completed by the employee. Each course taken is listed with the information about the training session. It displays the date the course was taken, if the employee passed or failed the course, as well as the due date for taking it again if it is a repetitive course (as defined in the course entry tab) or if the employee did not pass it. An asterisk on the due date indicates overdue status.

## 4.2.2 By Department tab

This report is the same as the “By Employee” report (section 4.2.1) except that it is sorted by department; displaying each employee in the department specified ( or each department in turn if All is specified).

### 4.2.3 By Course tab



**Training Completed** November 26, 2018

---

Number: ETH12643 Updated : 2017-06-20  
 Course : Ethics Retrain : Y Hours : 9

Employee	Employee #	Hours			
		Cmp	Taken	Pass	Due
Doe, John	A12345	8	2015-11-12	Pass	
Jones, Mary	C578434	8	2016-11-15	Pass	2018-11-26*
Newemp, Fresh	74930883-3335	9	2017-11-03	Pass	2019-11-03
Smith, Jane	BQ87534	9	2017-11-03	Fail	2018-11-26*

figure 4.2.3

This report has the same data as the “By Employee” tab but it lists the employees that have taken the specified course (or each course in turn if All is specified).

### 4.3 Echo Inputs report page

The Echo Inputs page reports back to you all of the list items that were entered into the database, such as the lists of employees, positions, departments, locations, and courses; as well as any other supporting data that you entered with them. In other words, it reflects the entered data. This is helpful in verifying the accuracy of the entered data. These were briefly touched on in the other sections of the guide (Human Resources and Training sections); as these are the same reports that are generated from the “Echo...” buttons on the individual input forms.

The Echo Inputs page consists of a dropdown select box containing each one of the items mentioned above. Select from the list and a PDF report will be generated and opened for your review.

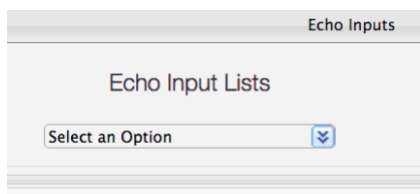


figure 4.3a

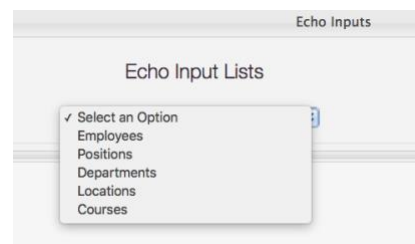


figure 4.3b

To save the report, click the download button in the upper right corner of the PDF window. To print the report, click the print button; also in the upper right corner. To return from the report, press the back button on your browser.

## 5. Admin

The Admin section is where the accounts administration is handled. It contains three tabs; Preferences, Accounts, and Sign-In-Log. For users with admin privileges, this section is used to create and maintain user accounts, monitor user login statistics, and set user accessibility limits. It is also used by all users to set their password and other user preferences.

### 5.1 Preferences tab and Database Backup

The Preferences tab is where you set various limits on user accessibility such as timeouts, what page to open to upon startup, and what data you want to see while using the database. This is also where you backup your database and set the logo to be displayed on the reports.

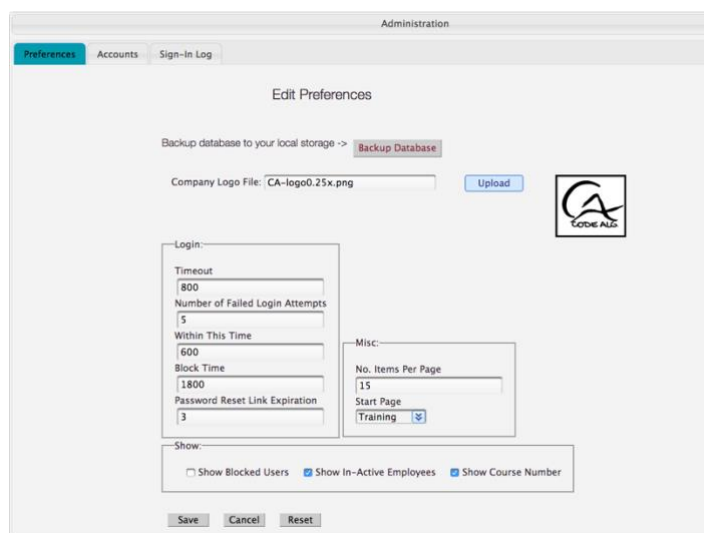


figure 5.1

#### 5.1.1 Database Backup and Restore

To backup your database, simply click the “Backup Database” button and you will get a save dialog box allowing you to navigate to a location on your local computer or server and download the resulting zipped SQL file. This file will also be automatically saved on the CodeAlg server in a folder with your CA Training Manager. However, only the 3 most recent backups will be stored here. You should not rely solely on these 3 backups as they may be on the same server system as your original working database file. You should maintain your own set of backups, via the download just described, on your system for a more complete security protocol.

Restoring your database requires access to the web hosting account and some basic knowledge of phpMyAdmin. If you do not have access to the web hosting account, you will need to contact your webmaster or a staff member at CodeAlg.

If the MySQL database, “**catrain**”, still exists (maybe the data was corrupted or lost), skip down to the “Restore Tables and Data...” section below. If the database was lost and no longer exists, start the recovery process by creating a new empty “**catrain**” database as follows:

### Restore From Scratch:

Login to your webhosting account at <https://www.codealg.com> and go to the cPanel. From cPanel, open “Databases” and select “MySQL Databases”. Create a new database and name it “**catrain**”. Notice that your hosting account user name will be prepended to the database name. This is fine. Click “Go back”. Verify that the new database is listed among the existing databases. Scroll down and set the user/password that was given to you by CodeAlg. Notice that the user name will also have your account user name prepended. Type the given user name and password in their respective boxes. *Note: if you have a need to change this password, you will need to contact [support@codealg.com](mailto:support@codealg.com) as this user/password is encrypted in your instance of the code in the CATM.* Click “Create User”. Click “Go Back” and scroll down to the bottom where it says “Add User To Database”. This is where you will connect this new user with the new database and set the user privileges. In the User box, click the drop down arrow and select the newly created user. In the Database box, click the drop down arrow and select the newly created database. Then, click “Add”. This will take you to the privileges page. Select the following privileges: Create Temporary Tables, Delete, Lock Tables, Select, Insert, Update. Click “Make Changes”. Click “Go Back”.

Note that the user you have created here is not the same as the user(s) that you will designate in the CATM to enter data; nor is it the same user that is associated with your hosting account at CodeAlg.com. This user is how the CATM connects to the database. In other words, the CATM program itself is this user. You are the user of CATM and CATM is the user of the “catrain” MySQL database.

Once the new empty database and the database user credentials are created, you will need to go back to the “Databases” section of the cPanel, select “phpMyAdmin”, and import the tables and data from the backup file as described in the following section.

### Restore Tables and Data into catrain:

If you haven’t already done so, login to your webhosting account at <https://www.codealg.com> and go to the cPanel. From cPanel, open “Databases” and select “phpMyAdmin”. Find the “**catrain**” database in the list on the left panel of phpMyAdmin and select it by clicking on it. Go to the Import tab. Verify that this database is specified at the top of the import page as the one you are about to import into. Click on “choose file” and navigate to and select the backup file you want to restore from. The default options should be fine but make sure the format is set to “SQL”. Then click “GO”. That is it! Your database should be restored and ready to use.

### 5.1.2 Upload Your Logo

To set a logo file for the reports, click the “Upload” button. Navigate to the location of your file and select it. Click “open”. The file you selected should appear in the input box to the left of the button. But, you are not done yet. You MUST click the “Save” button at the bottom of this page to actually upload and save the logo for use on the reports. After you have clicked Save, you will get a brief message in red saying: “Preferences were updated”. Now newly generated reports should have your logo in the upper left corner. **Note:** The supported logo formats are JPEG, PNG, and GIF. The resulting logo will be about 120px X 90px. So, be sure your logo will scale to this size.

### 5.1.3 Login block

The input block labeled “Login” contains several time limits that control when a user is timed out, blocked, and unblocked. These preferences can only be set by an admin user.

The first input, “Timeout”, defines seconds to timeout for idle user sessions. For unlimited time (i.e., no timeout), set this to -1. Note that a setting of -1 will allow the session to continue until the user manually logs out, or closes the browser window, and may allow for unauthorized access if the user walks away from the computer.

The next three inputs work together to define account lockout in the event of multiple login attempts/failures. The “Number of Failed Login Attempts” specifies how many failures are allowed while the “Within This Time” specifies the time interval (in seconds) over which to count the failures. The “Block Time” is the length of time (in seconds) that the account login is blocked. In other words, *X* number of failures within *Y* seconds will trigger a block on the account for *Z* seconds. A user with admin privileges may override this by unblocking the account on the Accounts tab (see below in section 5.2). Otherwise, it will automatically be unblocked after the “Block Time” has passed.

The “Password Reset Link Expiration” input sets the time limit (in days) for the emailed link to be valid to reset a forgotten password. After expiration, the user can request a new link to be sent by, again, clicking the “Forgot Password” link on the login page.

#### 5.1.4 Show block

The input block labeled “Show” contains checkboxes that toggle the display of certain data.

The “Show Blocked Users” will display/hide user accounts that have been blocked permanently by admin (NOT temporarily blocked from login failures). Use this box to show blocked accounts in order to unblock them in the Accounts tab. This can only be set by an admin user.

The “Show in-Active Employees” box will display/hide employees that have been deactivated on the Employees tab in the Human Resources section. This can be set by any user.

The “Show Course Number” will display/hide the course number on the reports. This is so that if course number is not used, it won’t be displayed. This can be set by any user.

#### 5.1.5 Misc block

The input block labeled “Misc” contains other items that are user preferences; such as, “No. Items Per Page”, and “Start Page”.

The “No. Items Per Page” defines the number of items displayed on each page where tables are used to return data to the user. This can be set by any user. Currently, there is only one table that uses pagination; the Sign-in-Log table.

The “Start Page” defines the opening page of the program. This should be set to the page used most often for convenience. This can be set by any user.



## 5.2 Accounts tab

The Accounts tab is where the user accounts are created/edited.

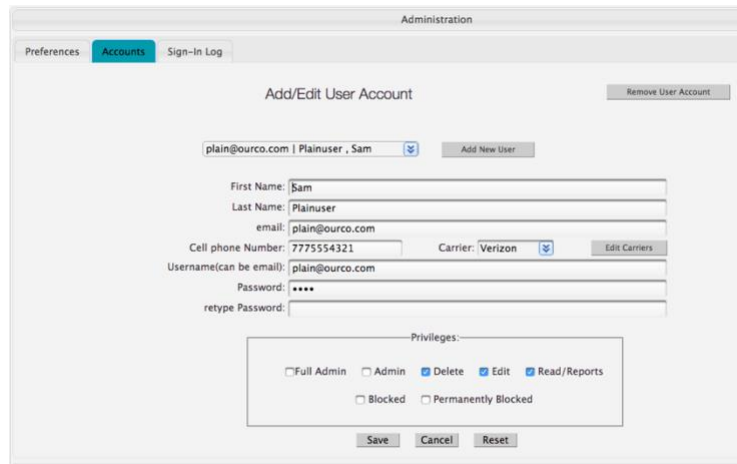


figure 5.2

At the top of the tab there is a select dropdown box containing existing user accounts and an option to create a new one. For convenience, there is also a button, to the right of the dropdown, to create a new user. In the upper right corner there is a remove button. This will be greyed out if there is no record selected or the user is editing his/her own record. Only Admin users can add new accounts. Non Admin users will only be able to see/edit their own account.

The main input area contains the usual information. The username can be any alphanumeric word; including an email address. The form also contains an optional entry of a cell phone number and carrier. The email and cell number are used to send links and codes to the user in the event of a forgotten password. You must enter the chosen password twice for verification purposes. The password can contain numbers, letters, and symbols and should be a long one that is difficult to guess.

The input box labeled “Privileges” is where you define the user privilege level (Full Admin, Admin, or User) and set the permissions for viewing and modifying the database. It also displays whether or not the account has been Blocked (by login failures) or Permanently Blocked by an Admin user. Hovering over some of the checkboxes displays a tip window describing the consequences of selecting them. They are also described in detail below.

### Setting Privileges:

#### Ground Rules:

1. You can't remove or block your own account.
2. Only full admin can block or remove admin or full admin.
3. Only full admin can make a user admin or full admin.
4. Only full admin can edit admin or full admin.
5. Only full admin can set his/her own privileges.

#### Full Admin can:

- Create/Edit User, Admin, and Full Admin accounts
- Set User, Admin, and Full Admin privileges

- Block/Un-Block User, Admin, and Full Admin accounts
- Set Timeout Limits
- View/Purge Sign-In-Log
- Set Own Privileges.

Admin can:

- Create/Edit User accounts
- Set User privileges
- Block/Un-Block User accounts
- Set Timeout Limits
- View Sign-In-Log.

User can:

- Edit his/her own account information including password.

**Note:** There is no checkbox for User level designation. User is implied if neither Full Admin nor Admin box is checked.

The “Delete”, “Edit”, “Read/Reports” checkboxes control the data entry privileges (they do **not** pertain to data entry on this tab). You can assign privilege to edit (create and modify records), but not give delete permission. You may want a user to have read (display data and view reports) permission, but not be able to modify or create new records. Just because a user is Admin, doesn’t mean they should be modifying training records. It’s all up to you. Just keep in mind that:

- If they have edit privilege, they have read privilege.
- If they don't have edit privilege, they don't have delete privilege.
- If they don't have read privilege, they don't have edit or delete privilege.

The checkboxes will toggle to enforce this.

The “Blocked” checkbox indicates whether or not the account is blocked due to too many login failures. It will be un-blocked automatically after the “Block Time”, as set on the Preferences tab, has passed since the last failure. If needed, this can be un-blocked here immediately by un-checking this box; in accordance with the rules listed above.

The “Permanently Blocked” checkbox indicates whether or not the account is blocked on a permanent basis by an admin. This might be done in the case that a user no longer works for the company or no longer requires access to the database for any reason. This can be reversed by un-checking the box; in accordance with the rules listed above.

When all data has been entered into the form, click Save at the bottom to commit these entries to the database. To cancel simply click the Cancel button or leave the tab or form without saving.

### 5.3 Sign-In-Log tab

The Sign-In-Log tab displays statistics on user login data. It shows the number of login failures and the full timestamp log of users as they signed in and out of the CATM. This tab can only be accessed by an Admin.

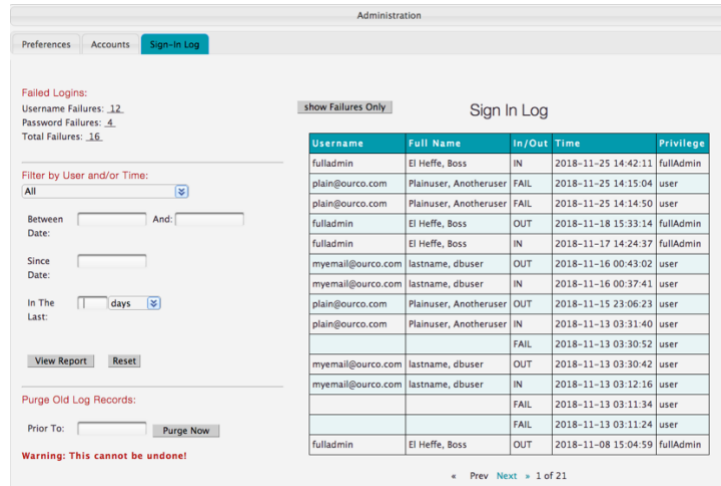


figure 5.3

In the upper left corner of the tab, you will find the number of username failures, password failures, and the total number of failures. This reflects the sum of failures based on the data shown in the log on the right.

The Sign In Log contains the Username, Full Name, If they logged In or Out (or Fail if unsuccessful), Date/Time, and the privilege level of the user. If there is no username, then it was a username failure. The log will display as many per page as is designated on the Preferences tab. At the bottom of the log there will be a set of pagination navigation links to page through the data. Click on the words "Prev" and "Next" to step one page at a time. Click on the "<<" and ">>" to go the first and last page respectfully.

On the left under the total failure stats, is an input form of criteria for filtering the log data based on a specified user and/or dates. Select a user from the dropdown box and/or a date or date window of interest. All date input boxes can be double clicked to display a calendar for easy entry. It will use the filters in reverse order from how they appear on the tab. In other words: it will use "In the Last..." filter, if it is set. If not, it will use "Since Date" filter, if set. If not, it will use "Between Date" filter, if set. If all is blank, it will report data for all dates. After selections are made, click "View Report". To return to all records, clear the form and make sure All is selected in the dropdown box. Then click "View Report" once again.

You can also opt to view only failures for the criteria above, or all data, by clicking the "show Failures Only" button at the top of the log table. Click it again to return to the full log.

If the need arises, you can purge old log records from the database to reduce the size of database. This can be done from the form in the lower left corner of the tab. Enter a date in the input box (double click for calendar) and click "Purge Now". This will delete all records in the log prior to the date entered. This will only be visible for Full Admin users. This **purge cannot be undone**.

## 6. Notes