TECH TRAINING
INSTRUCTIONAL USER MANUAL

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER™
EL PASO
Office *of* Institutional Compliance

JANUARY 12, 2024

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO

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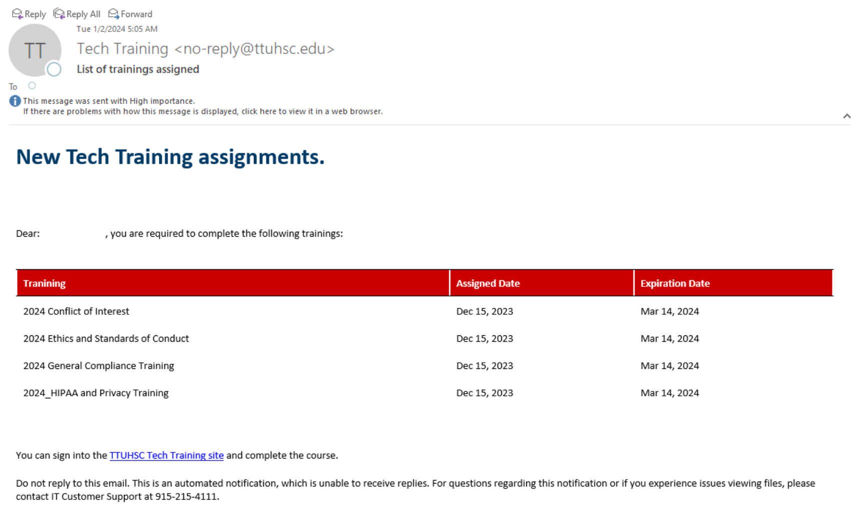
USER ROLE – FUNCTIONS

MY ASSIGNED TRAININGS

1) When a training course has been assigned to you, you will receive an email notification.


Reply Reply All Forward
Tue 1/2/2024 5:05 AM
Tech Training <no-reply@ttuhsc.edu>
List of trainings assigned
To
This message was sent with High importance.
If there are problems with how this message is displayed, click here to view it in a web browser.

New Tech Training assignments.

Dear: , you are required to complete the following trainings:

Tranining	Assigned Date	Expiration Date
2024 Conflict of Interest	Dec 15, 2023	Mar 14, 2024
2024 Ethics and Standards of Conduct	Dec 15, 2023	Mar 14, 2024
2024 General Compliance Training	Dec 15, 2023	Mar 14, 2024
2024_HIPAA and Privacy Training	Dec 15, 2023	Mar 14, 2024

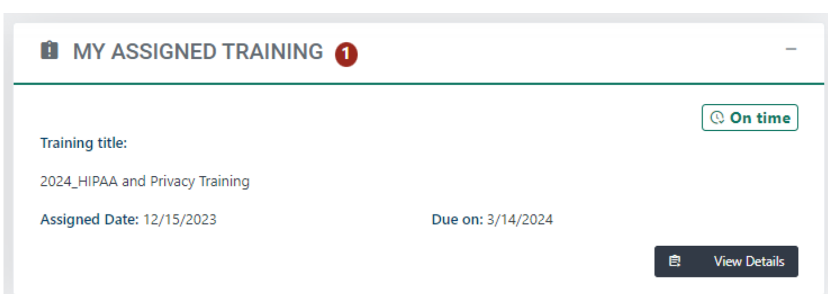
You can sign into the TTUHSC Tech Training site and complete the course.

Do not reply to this email. This is an automated notification, which is unable to receive replies. For questions regarding this notification or if you experience issues viewing files, please contact IT Customer Support at 915-215-4111.

2) To access the training, click on the link provided in the email and log into **Tech Training** using your TTUHSC EP credentials or go to https://academic.elpaso.ttuhsc.edu/TechTraining/

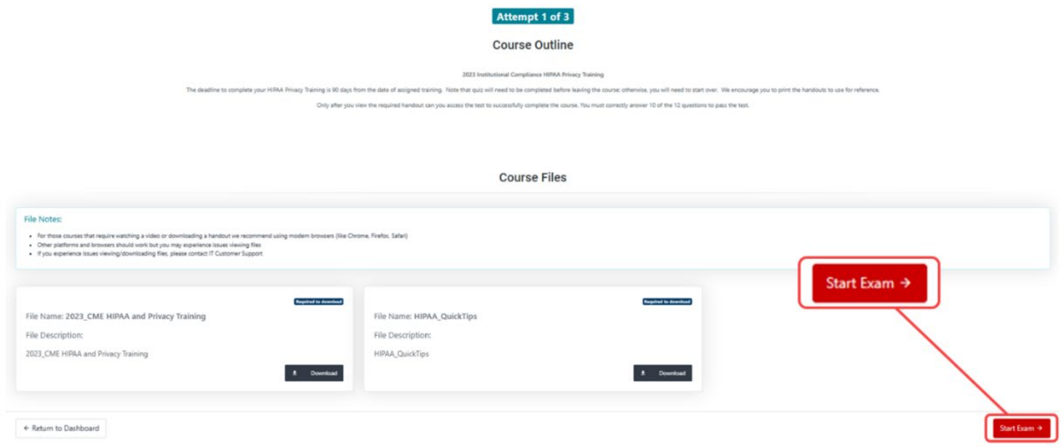
You can sign into the TTUHSC Tech Training site and complete the course.

3) Once you log in, you will able to see all trainings that have been assigned to you listed in the **My Assigned Training** section.

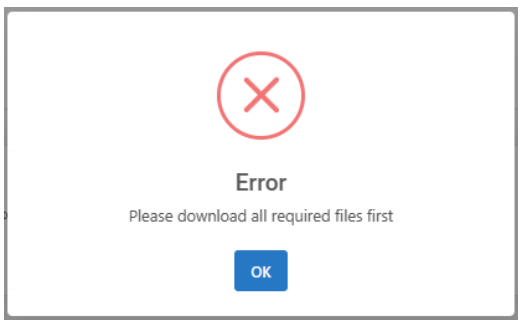


4) Click on the View Details button to go to the course.

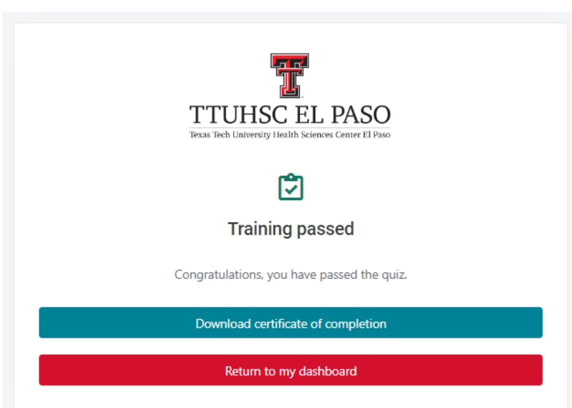
5) Next, you will see the **Course Outline** and **Course Files** screen. To begin the course, download the **Course Files**.
   a) When you are ready to take the exam, click on the **Start Exam** button.



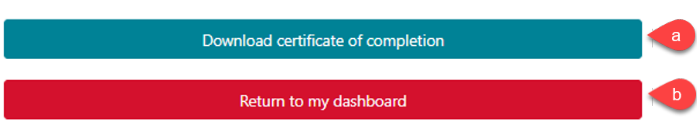
***Note**: If you do not download the course files that are required, you will see the following pop-up box and you will not be able to proceed to the exam portion.*
Do not *click on the back button of your browser when beginning an exam as it will count it as an attempt.*



6) The following message will appear when you have successfully passed the exam.

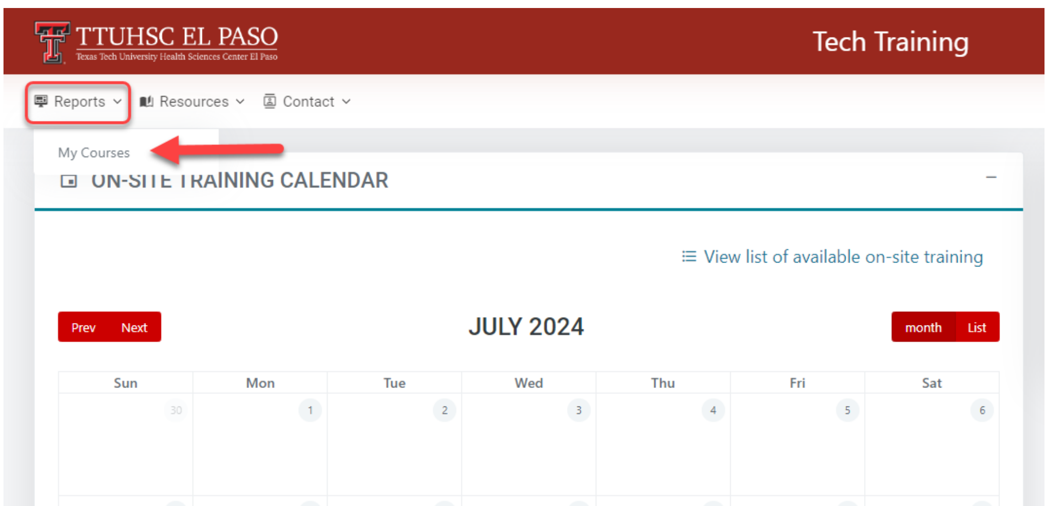


7) You will have the option to return to the **Dashboard** or print your certificate.

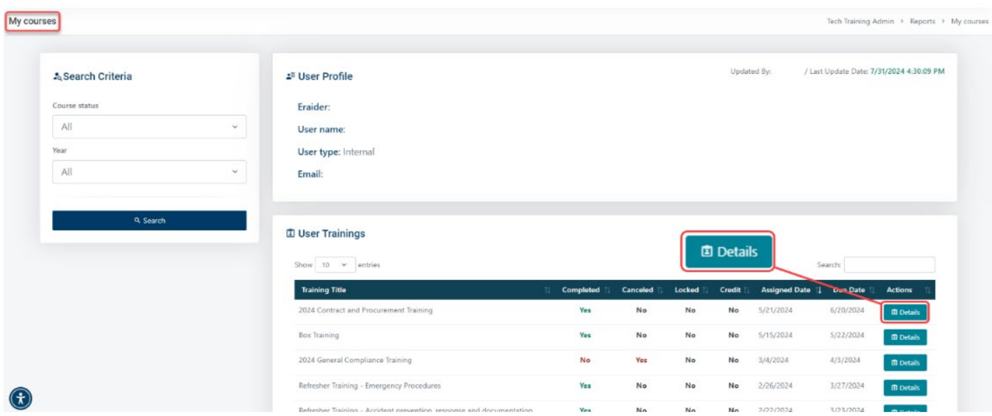


a) If you choose the **Download a Certificate of Completion** option, you will receive a training certificate in PDF format. The certificate can be printed or saved on your computer.

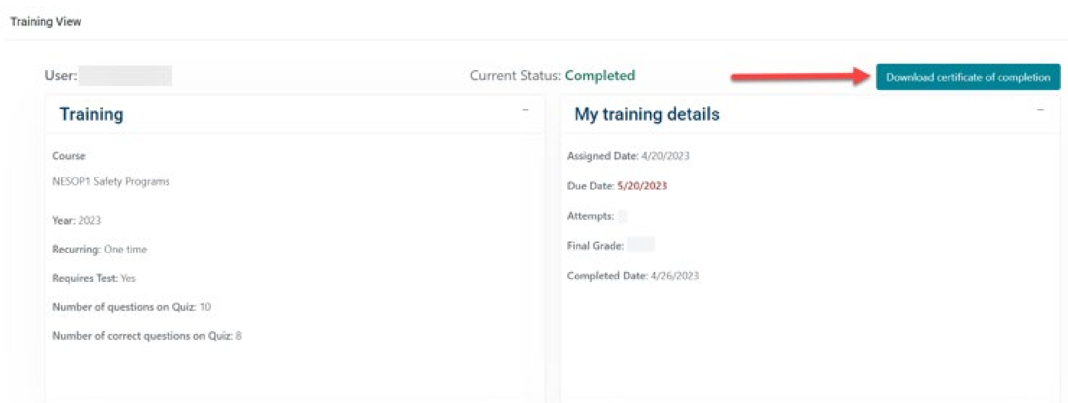
8) An alternate way to print the **Certificate of Completion** is by going under the **Reports** tab and clicking on **My Courses**.



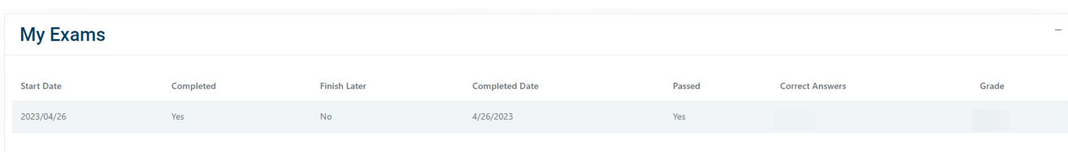
9) This will take you to the **My courses** screen. Click on the **Details** button.



10) Next, you will see the following screen. Click on **Download certificate of completion**.

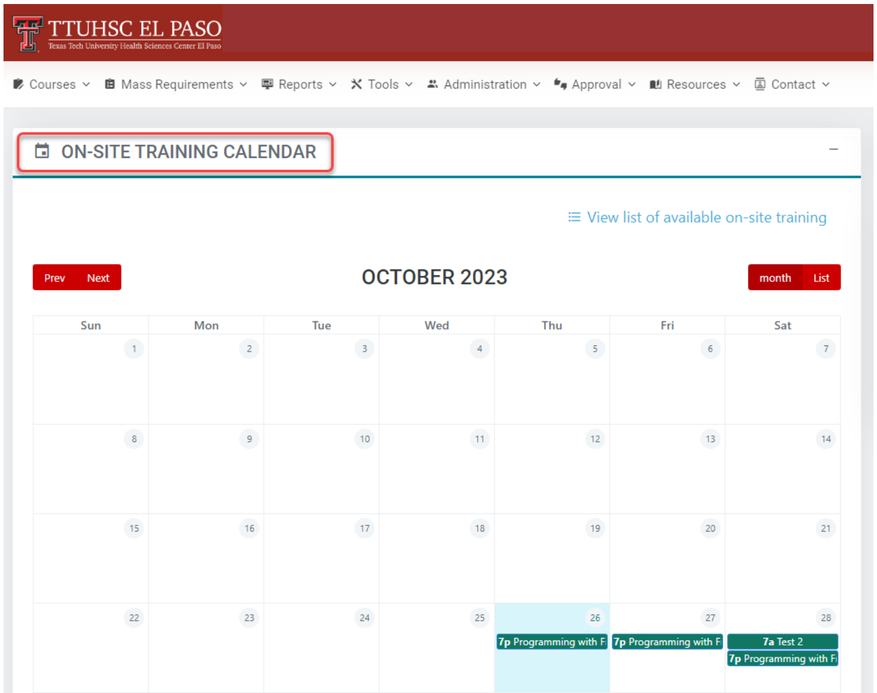


11) If you scroll down on this screen, you will see **My Exams** section. This will allow you to see information of all of the exams you have taken.

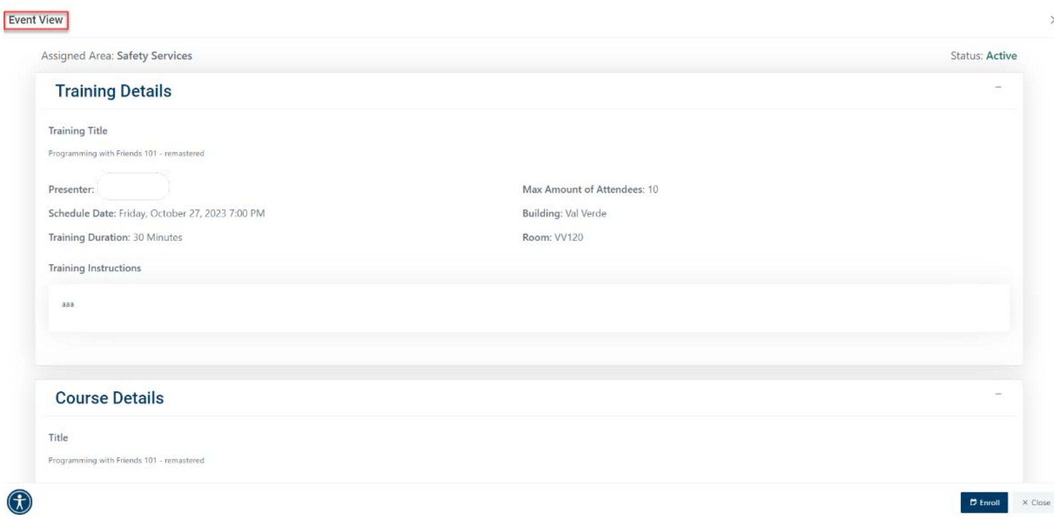


Enrolling in an On-Site Course

1) If you want to enroll in an On-Site course, go to the **On-Site Training Calendar**.

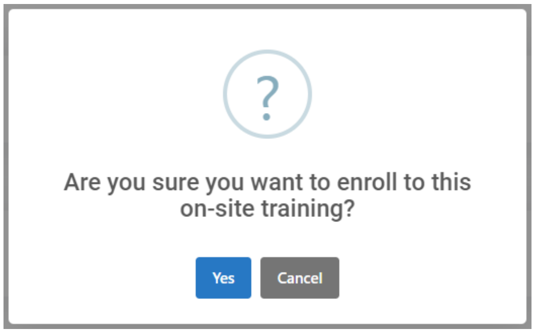


a) Click on the name of the training you want to enroll in. This will take you to the **Event View** screen.

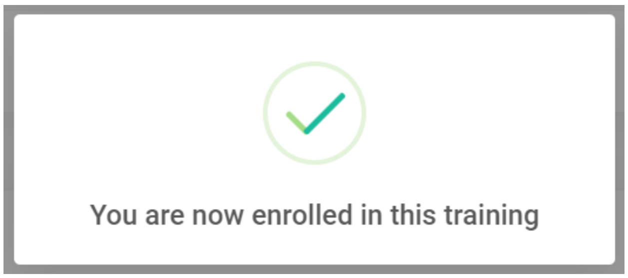


b) Click on the  button to be added to the training session.

c) A pop-up box will appear. Click **Cancel** to go back to the **On-Site Training Calendar** or click **Yes** to continue.



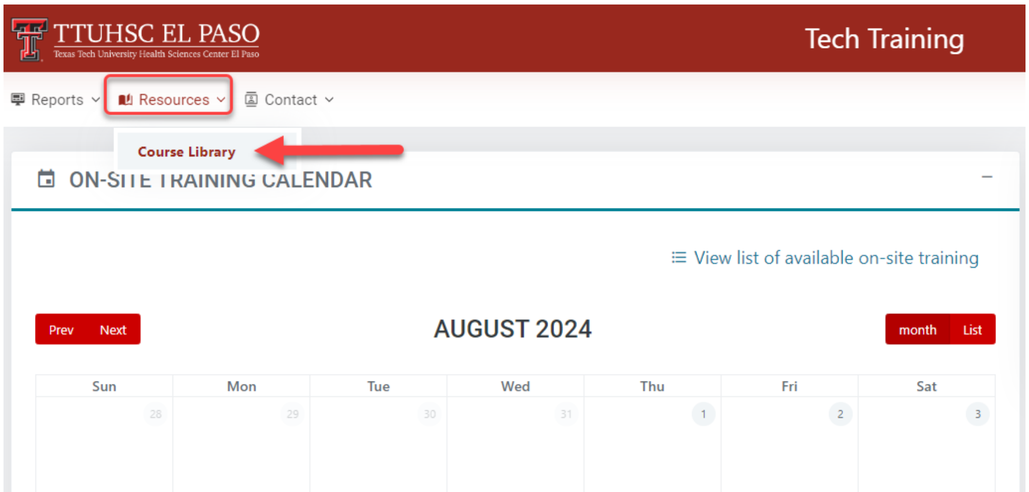
d) If you click **Yes**, a pop-up will appear confirming that you are enrolled in the training.



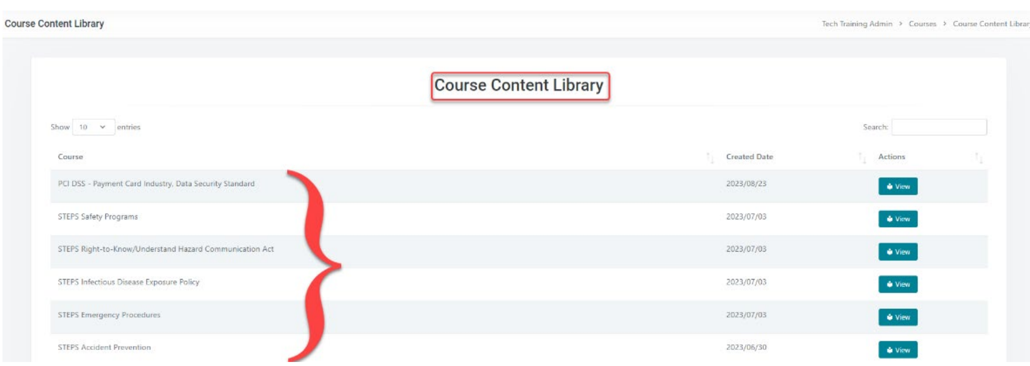
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

1) To go to the **Couse Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



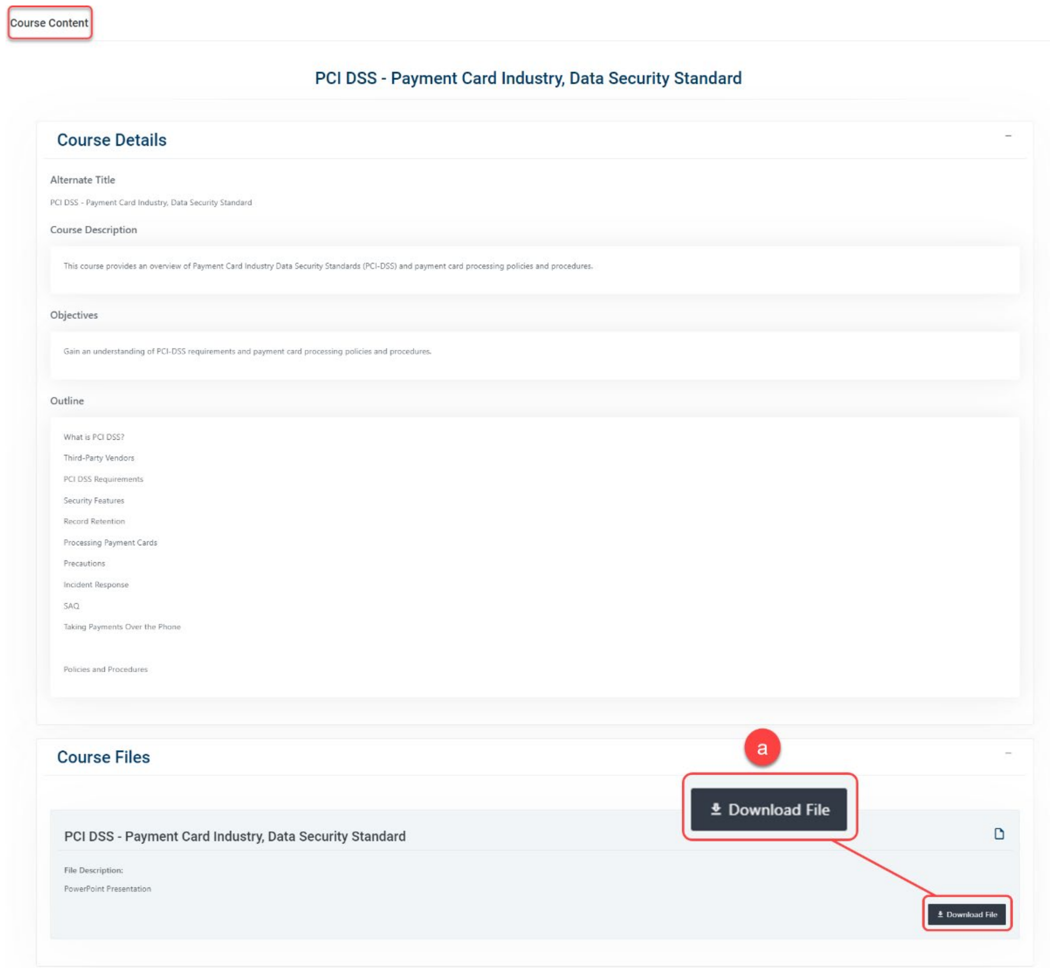
2) This will take you to the **Course Content Library** screen. In this page, you will able to see all the trainings that have been uploaded.



a) Click on the  button to view the content for your desired training(s).

3) Next, you will see the **Course Content** page which allows you to see the details for that training.

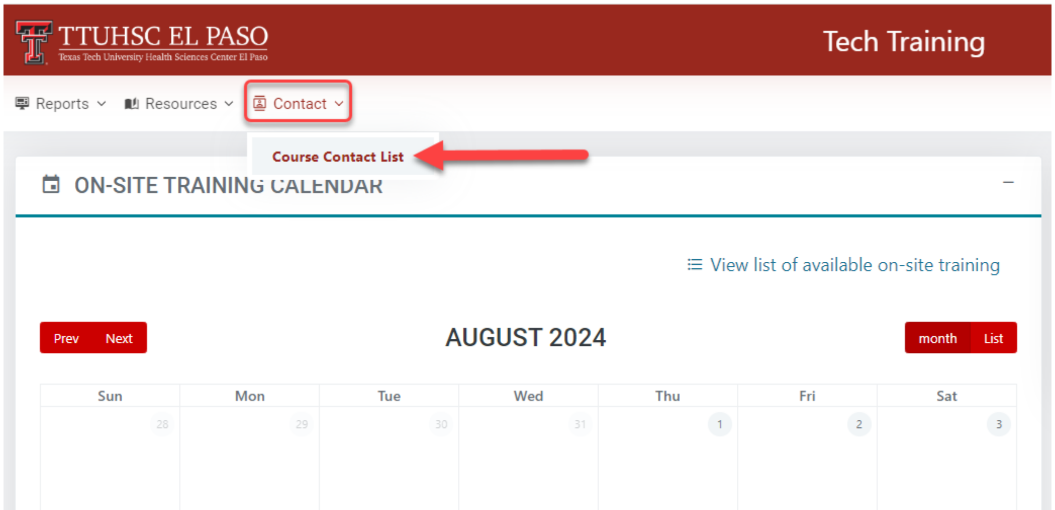
a) You can also download the **Course Files** for that course.


Course Content
PCI DSS - Payment Card Industry, Data Security Standard
Course Details
Alternate Title
PCI DSS - Payment Card Industry, Data Security Standard
Course Description
This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.
Objectives
Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.
Outline
What is PCI DSS?
Third-Party Vendors
PCI DSS Requirements
Security Features
Record Retention
Processing Payment Cards
Precautions
Incident Response
SAQ
Taking Payments Over the Phone
Policies and Procedures
Course Files
a
Download File
PCI DSS - Payment Card Industry, Data Security Standard
File Description:
PowerPoint Presentation
Download File

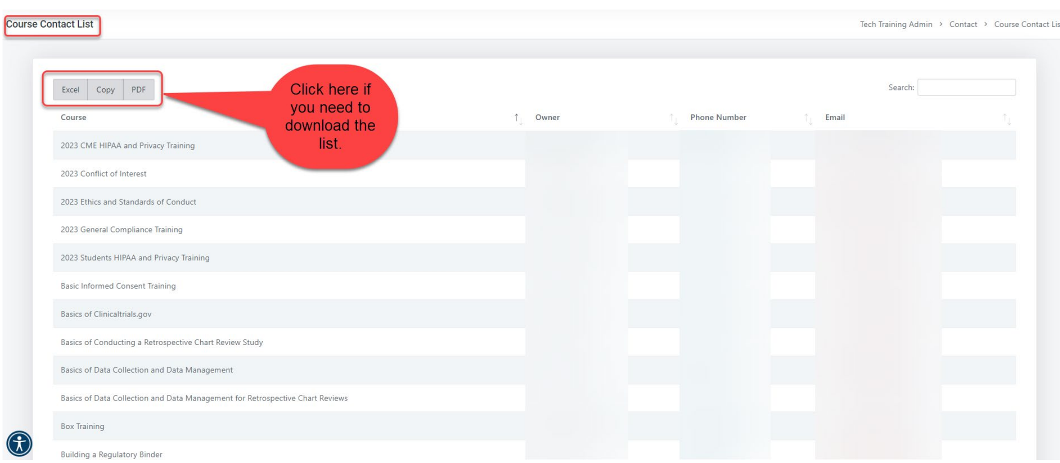
CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

1) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.

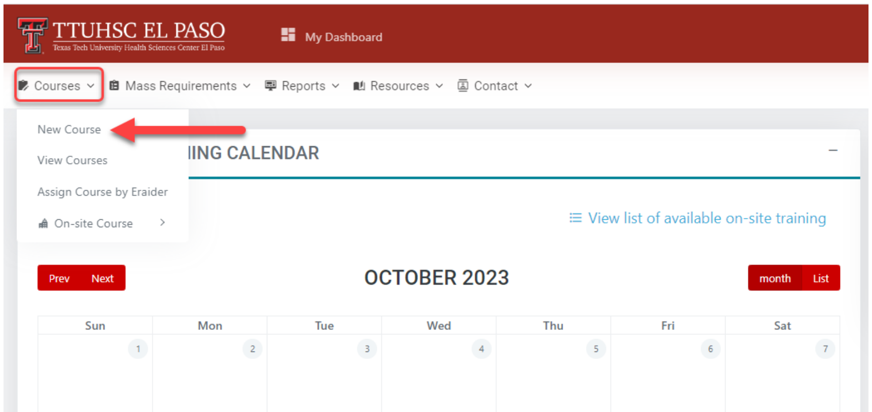


2) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number, and email.



COURSES – NEW COURSE

1) To create a course, you can go to the **Courses** dropdown from left hand corner and click on **New Course**.

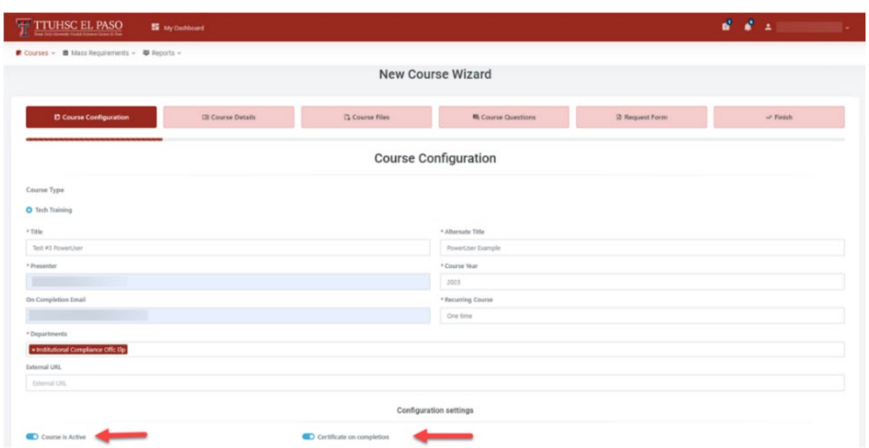


2) You will be directed to the **New Course Wizard** screen. This is the **Course Configuration** tab.

   a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

   - Under **Departments**, your department name will be the only option available.
   - For **External URL**, use this only if course will have an external source attached. (For example, utilizing YouTube videos or external sites outside of TTUHSC EP website.)

   b) Assure the **Course is Active** and **Certificate on Completion** toggle buttons under **Configuration settings** are blue. This will make them active.



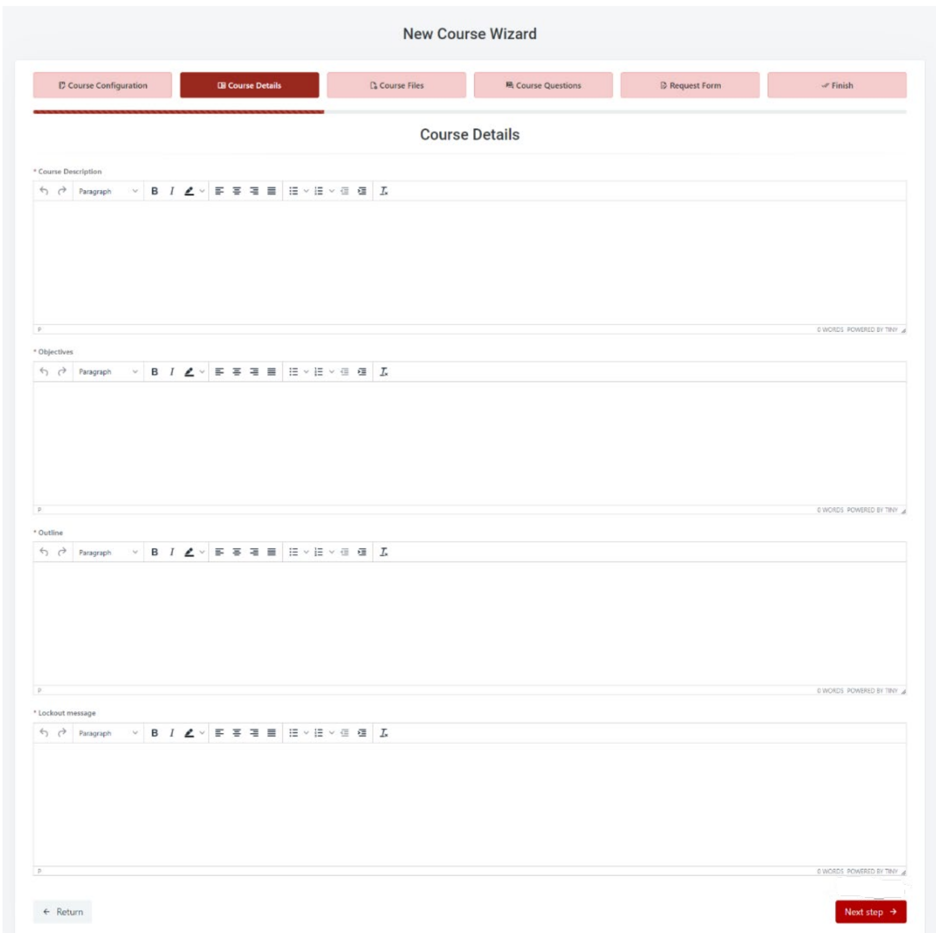
   c) Once the information is completed, click on Next step → to proceed.

3) You will be directed to the **Course Details** tab below:

a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

b) Then click on Next step → to proceed.

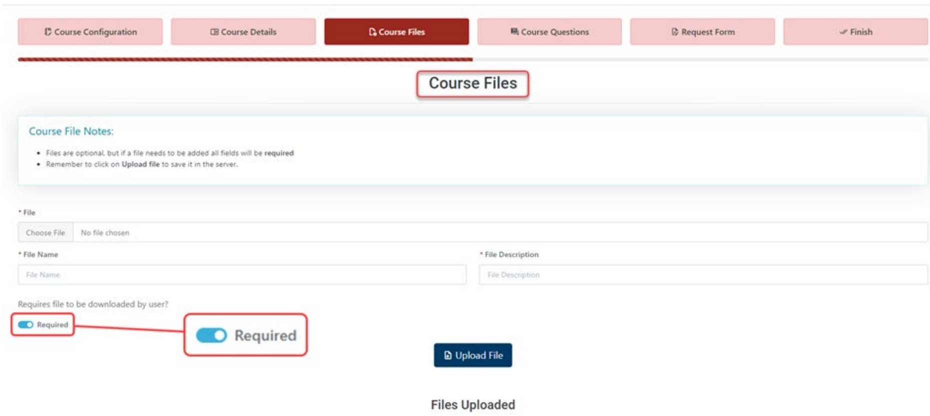
- **Course Description** – this section will include a short description of the course.
- **Objectives** – this section will outline the goals for the user upon the completion of this course.
- **Outline** – enter a general description of the course content and instructions.
- **Lockout Message** – enter contact information of person that can unlock the training for user.



4) Under **Course Files** tab, you will be able to upload the desired files. There is no limit to the number of files you wish to upload.

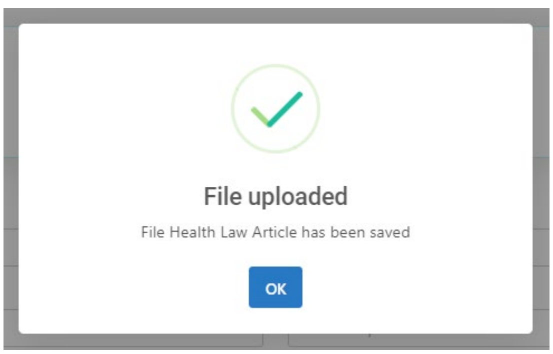
a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

b) Ensure the **Required** toggle button at the bottom left hand corner of the page is blue. This will make downloading the course files a requirement.



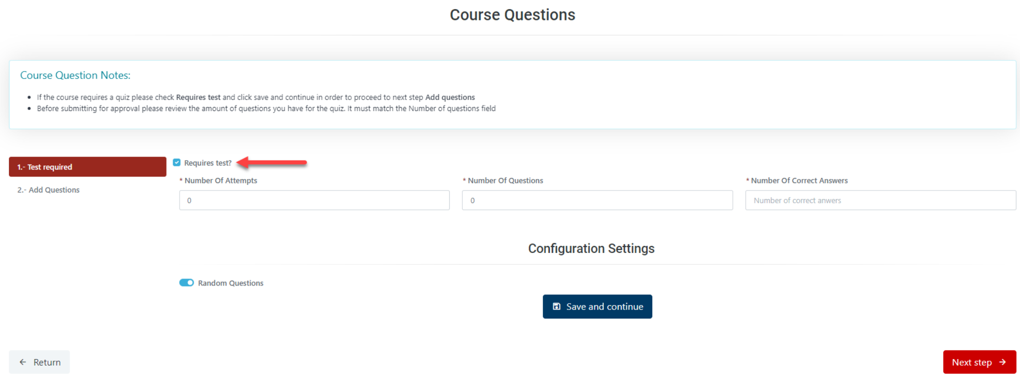
5) Once the files have been uploaded, click **Upload Files**.

a) A pop-up box will appear. Click **Ok.**



6) You may continue uploading additional files. If you are finished, click on  to proceed.

7) You will be directed to **Course Questions** tab. This is a two-step process.
a) First, answer **1. If a test is required**, check the **Requires test?** checkbox.



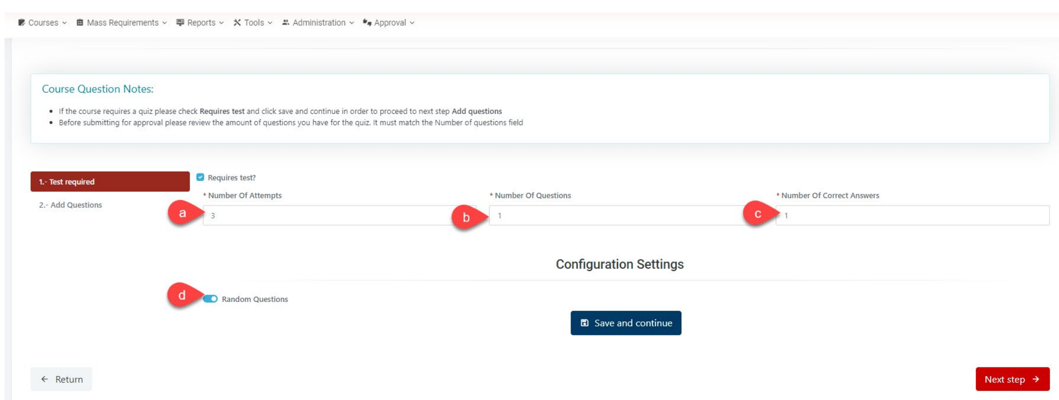
8) Next, you will need to fill in the following fields:

a) **Number of Attempts** – this field determines how many times the user is allowed to take the test before being locked out.

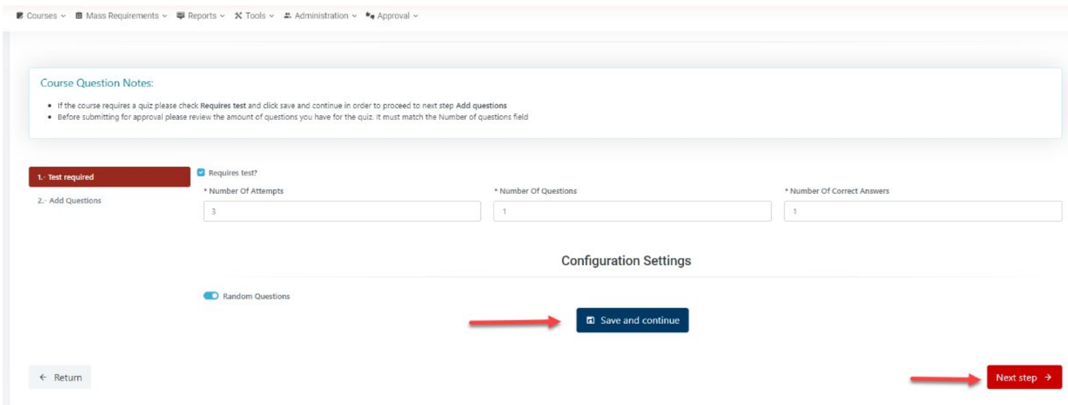
b) **Number of Questions** – this field will determine how many questions the user will receive each time the test is taken.

c) The **Number of Correct Answers** – this field will determine the number of questions that must be answered correctly to pass the test.

d) You will have the option to choose **Random Questions**. It is recommended that you select **Random Questions**, so that the user receives a new shuffled set of questions when retaking a test. If you don't choose Random Questions, the questions will appear in the same order each time the user initiates the test.

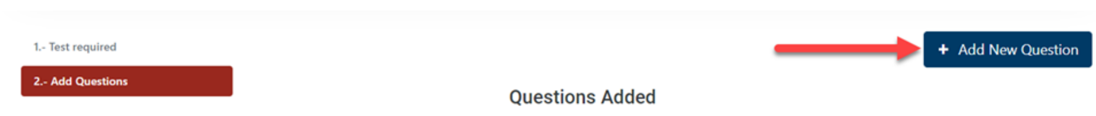


9) When the information has been entered in Step 1, click on **Save and continue** button at the bottom of the screen. Then click on Next step →.



10) Next, you will be directed to the **2.-Add Questions** step.

a) Click on **Add New Question** button to start adding questions.



11) This will take you to the following steps. Fill out the + Add New Question fields.

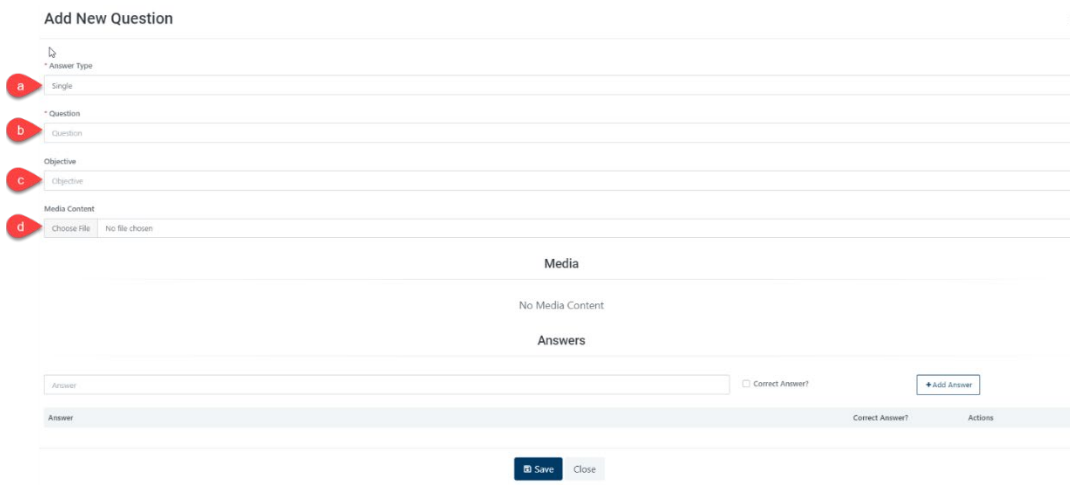
a) **Answer Type** – There are two types of answers: single or multiple. Choose **single** if question only has one correct answer. Choose **multiple** if question has more than one correct answer.

b) **Question –** The questions can be typed in, or you can cut and paste the questions from a word document. **DO NOT start a question with a number or a letter if you chose the Random Questions.**

- **Example: 1. Who is the President? or a. Who is the President?**

c) **Objective** – This section may be left blank or you may add an objective. This is not a required field.

d) **Media Content** – This section may be left blank if external URLs are not needed.

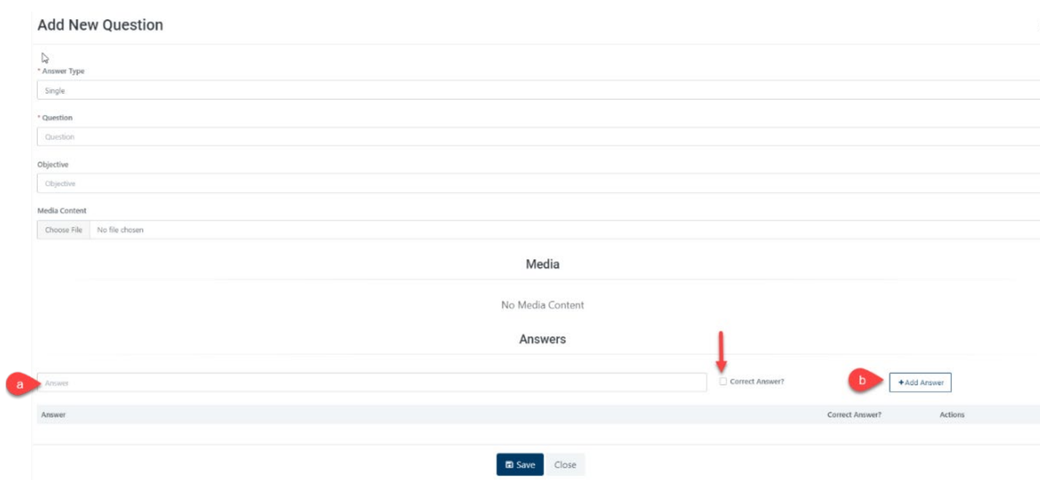


12) Next, go to the **Answer** section:

a) Type the first possible answer in the **Answer** field (you can also cut and paste the answers from a word document). If this is the correct answer, make sure to click on the **Correct Answer check** box.

b) If it is not the correct answer, click on the **+Add Answer box** to continue adding possible answers. **DO NOT start an answer with a number or a letter.**

- Example: 1. True or a. True



13) Once you have entered all corresponding options for the questions, click on the 

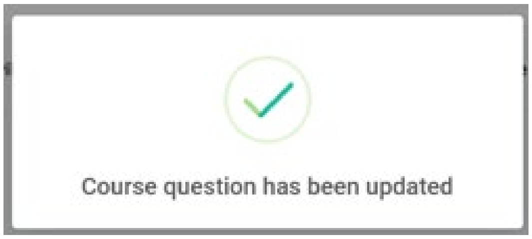
button on the bottom of your screen.

14) When you have successfully added the questions and answers and click on the 

button, the following pop-up notification will appear:

Back to Top

*Note: You will start seeing the questions you added under the **Questions Added** section.*

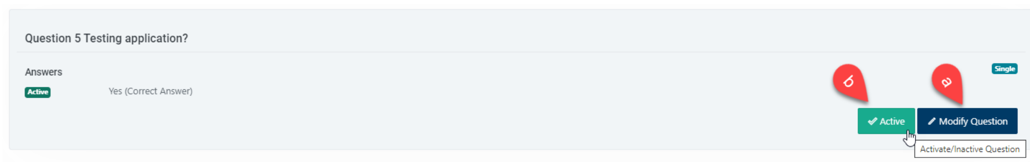


15) **Repeat steps 10 - 14 to continue adding questions.**

16) Verify that everything is correct before proceeding to the next step.

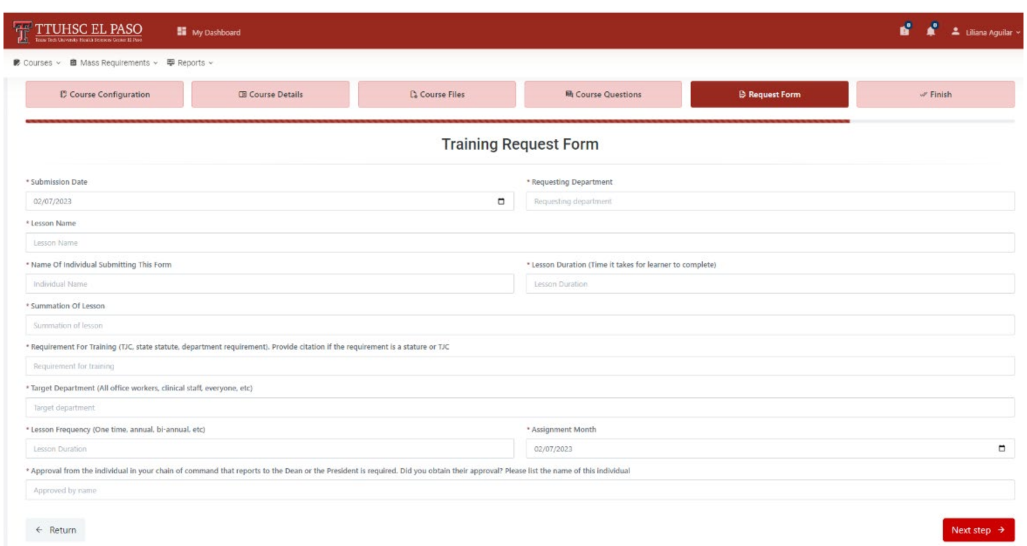
   a) If you need to make changes, click on **Modify Question.**

   b) You can **Activate/Inactivate** a question. For example, inactivate a question that was submitted in error or was a duplicate entry.



17) Once everything is correct, click on Next step → at the bottom of the page.

18) Next, you will be directed to the **Request Form** tab. This is the **Training Request Form** screen. All fields need to be filled in.



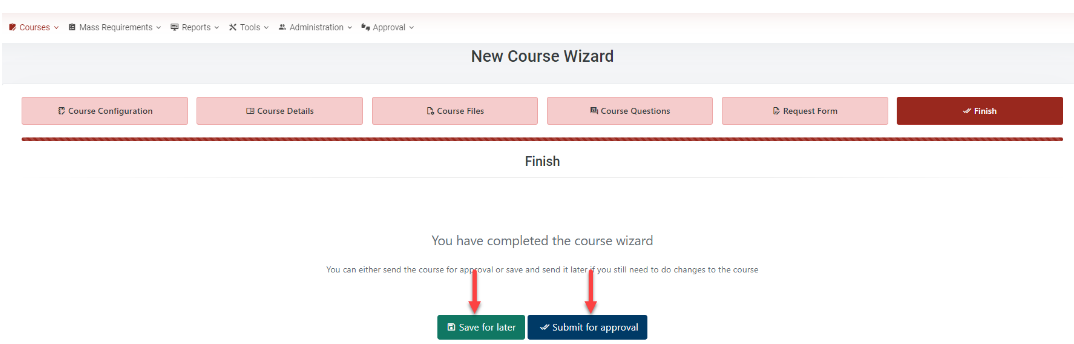
- **Submission Date** – Enter date when training is submitted.
- **Requesting Department** – Enter department that owns the training.
- **Lesson Name** – Enter full name of the course.
- **Name of Individual Submitting This Form** – Enter your full name and title.
- **Lesson Duration** – Time it takes for user to complete the training.
- **Summation of Lesson** – Enter brief summary of training.
- **Requirement for Training** – (TJC, state statute, department requirement). Provide Citation if the requirement is statute or TJC.
- **Target Department** – Enter all office workers, clinical staff, everyone, etc.
- **Lesson Frequency** – Determine if training will be assigned one time, annually, bi-annually, etc.
- **Assignment Month** – Enter the date the course is going to be assigned to users.
- **Approval from the individual in your chain of command** that reports to the Dean of the President is required. Did you obtain their approval? Please list the name of this individual.

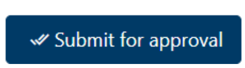
19) Once this form is completed, click on 

at the bottom of the page.

20) The final step in the **New Course Wizard** is the **Finish** tab.

a) In the **Finish** tab, you will have one of two options: **Save for later** or **Submit for approval**.

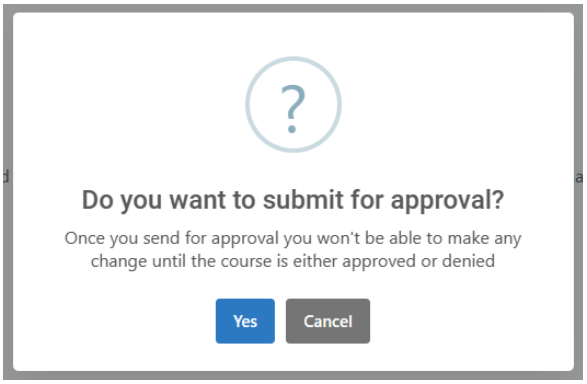


21) When you click the 

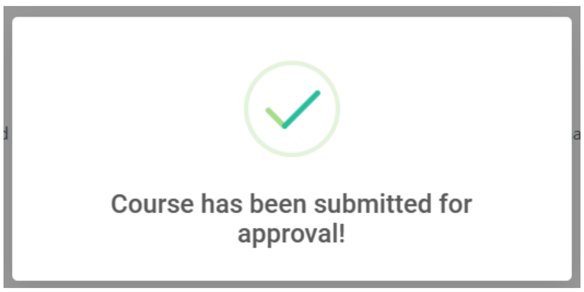
option, you will see the following pop-up box:

a) If you are ready to submit the course, click **Yes** to submit for approval.

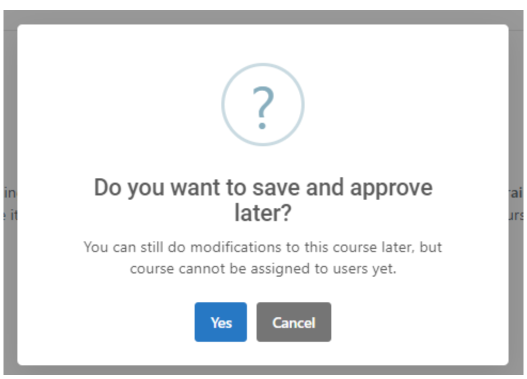
*Note: If you need to back to the **Finish** tab, click **Cancel**.*



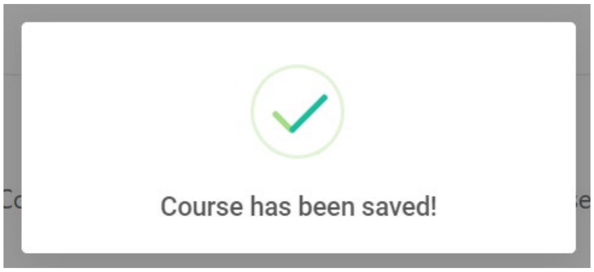
b) Once you click **Yes**, you will see the pop-up screen below confirming the course has been submitted for approval:



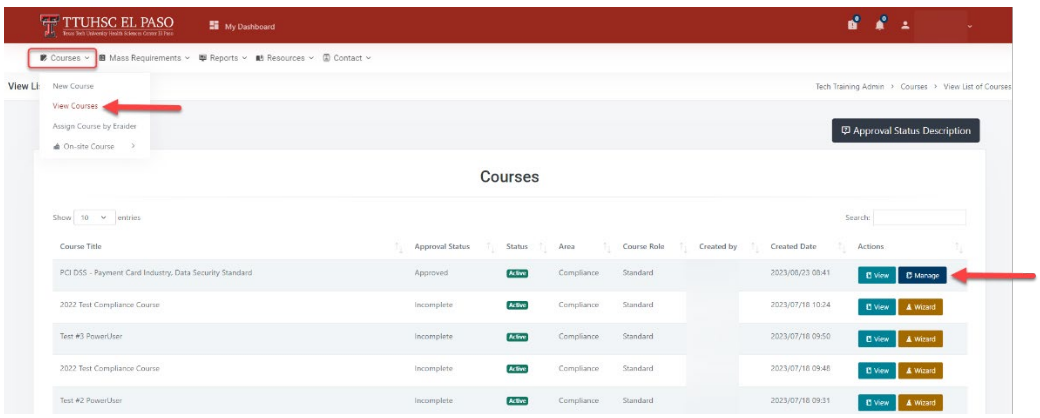
22) If you click on the **Save for later** option, you will see the pop-up box below. Click **Yes** to confirm. *Note: To go back to the Finish tab, click **Cancel**.*



a) When you click **Yes**, you will see the following pop up box stating the training has been saved:



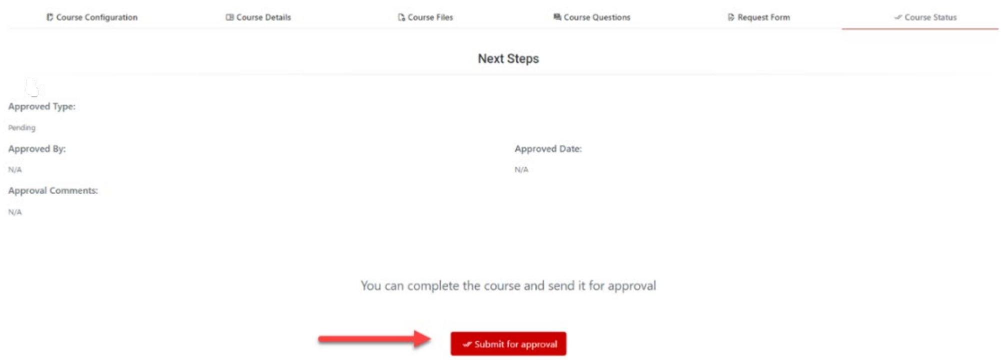
23) If you need to go back to a course that has been saved, click on the **Courses→ View Courses** section to locate the training. The status under the **Actions** column will change to **Manage**. Click on the **Manage** button to open the training.



24) You will be directed to the **Course Configuration** screen. From here, you can click on any one of the tabs to **modify/update** the information.

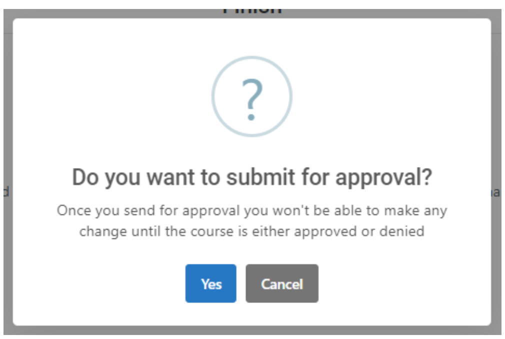
- If you **modify/update** information in one of the tabs, make sure to click on the **Save** button at the bottom of the page.

25) Once you have **modified/updated** the information, go to the **Course Status** tab and click on **Submit for Approval**.



26) When you click on **Submit for Approval**, you will see the pop-up screen below. You may choose to submit the course by selecting **Yes,** or choose **Cancel** to go back to the **New Course Wizard** screen.

27) If you choose **Yes**, you will get another pop-up box indicating the course has been submitted.



28) Once a course has been **submitted for approval**, an automated email will be sent to the Committee members.

29) When the course has been **approved/denied** by a Committee member, you will receive an automated notification via email.

- Example for when course has been approved:

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To:
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

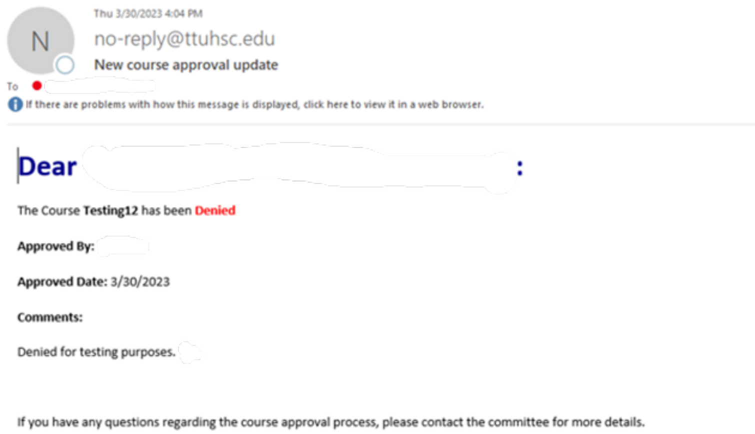
Approved By:

Approved Date: 12/31/2022

Comments:

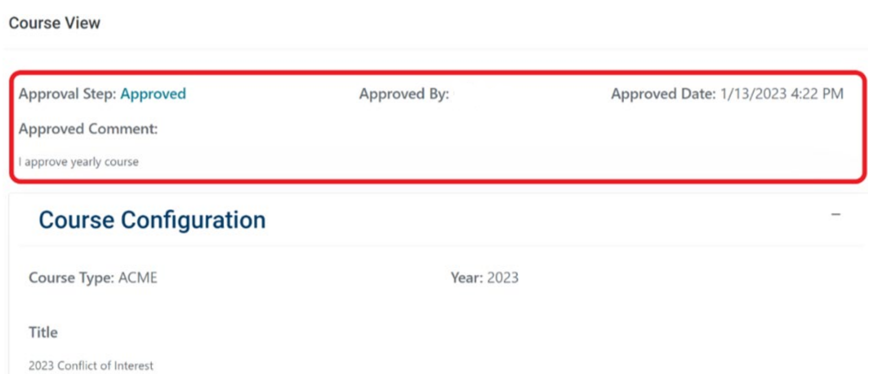
approve

- Example for when course has been denied:

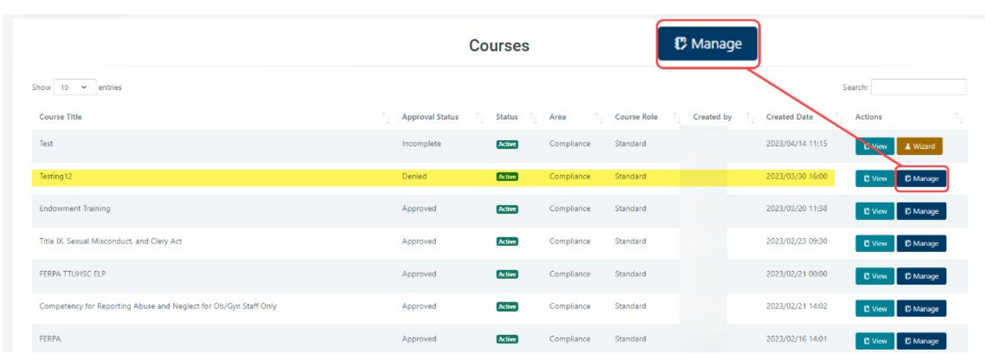


30) If the course is **denied** and changes need to be made, go to the **Courses** tab at the top-left side of the page. Click on the **View Courses** section, look for the course and click on the **View** button.

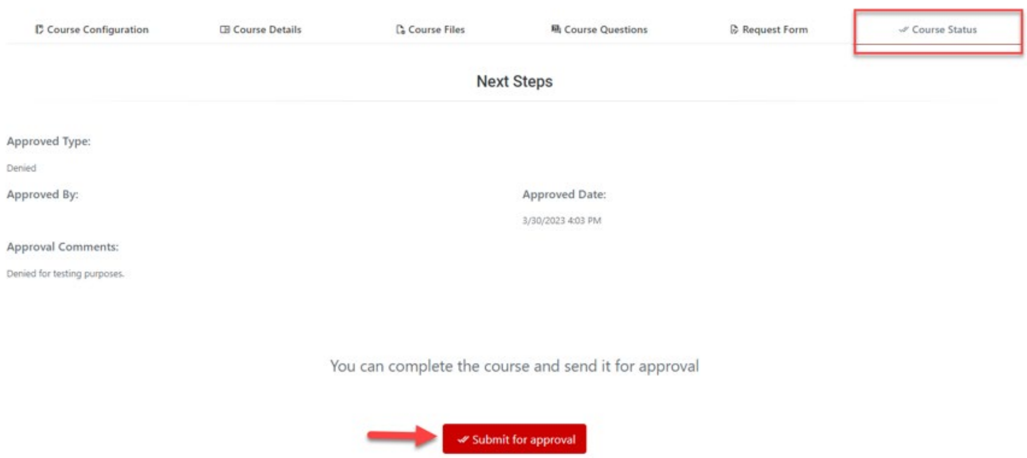
   a) In the **Course View** section, you can see the status of the course. If denied, Committee members will indicate the reason for denial under the **Approved Comment** section.



31) If changes need to be made, you can go to the **Manage** button on the right.



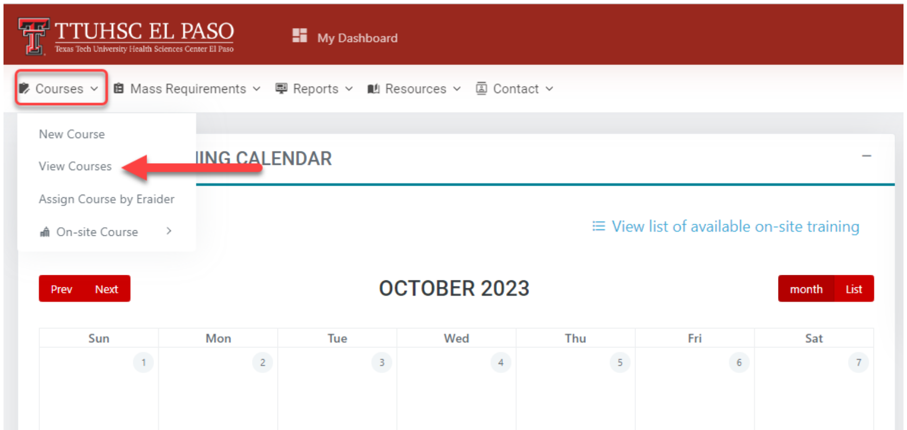
32) Once you have made all necessary edits, you may go to the **Course Status** tab and resubmit the course for approval. (The course will be rerouted to the Committee for approval.)



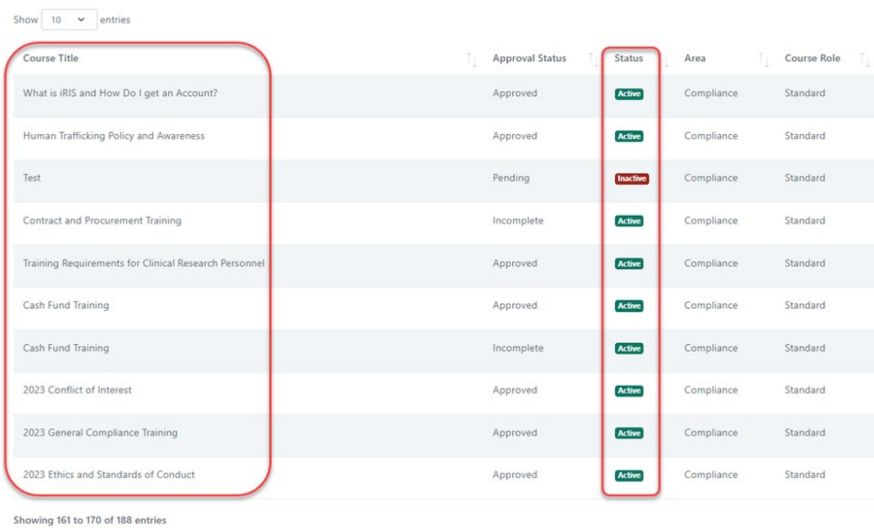
Note: The training owner will need to resubmit course each year for Committee approval.

COURSES – VIEW COURSES

1) To review courses, click on the **Courses** dropdown menu then click on **View Courses**.



2) In the **View Courses** section, you will see a list of all the courses that have been submitted and their **Course Status**.

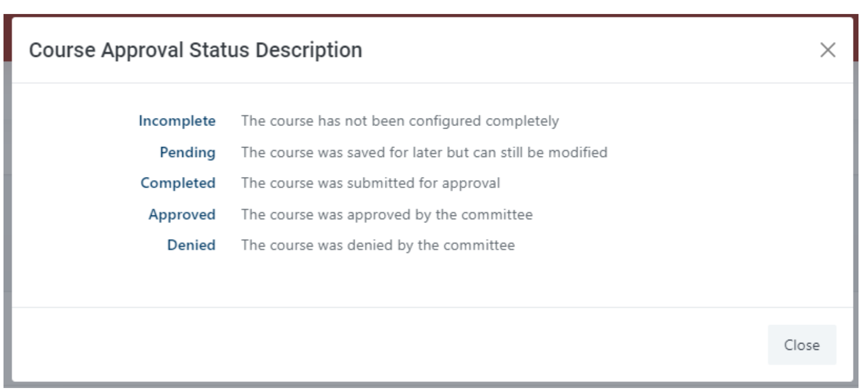


Show 10 entries

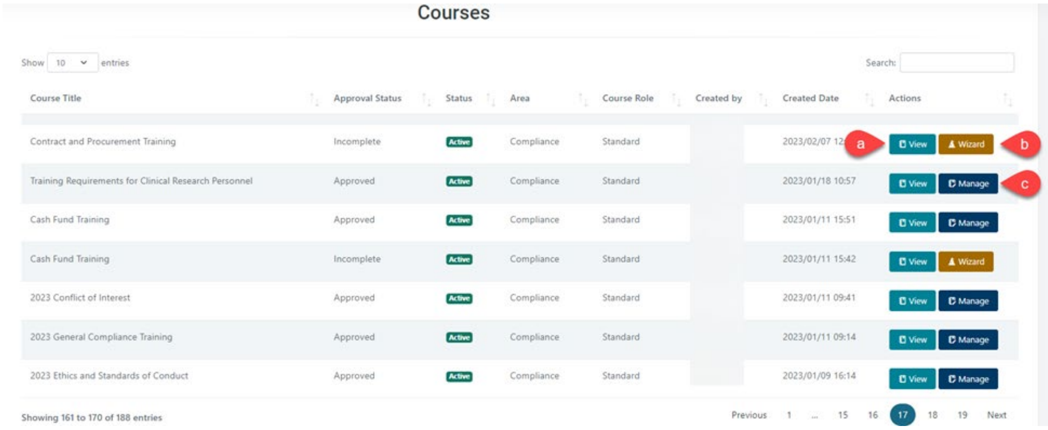
Course Title	Approval Status	Status	Area	Course Role
What is iRIS and How Do I get an Account?	Approved	Active	Compliance	Standard
Human Trafficking Policy and Awareness	Approved	Active	Compliance	Standard
Test	Pending	Inactive	Compliance	Standard
Contract and Procurement Training	Incomplete	Active	Compliance	Standard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard
Cash Fund Training	Approved	Active	Compliance	Standard
Cash Fund Training	Incomplete	Active	Compliance	Standard
2023 Conflict of Interest	Approved	Active	Compliance	Standard
2023 General Compliance Training	Approved	Active	Compliance	Standard
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard

Showing 161 to 170 of 188 entries

3) The following are the **Course Approval Status Descriptions**:



4) You can also **View, Manage** or go to the **Wizard** option for the course.



Courses

Show 10 entries Search:

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Contract and Procurement Training	Incomplete	Active	Compliance	Standard		2023/02/07 12:	View Wizard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard		2023/01/18 10:57	View Manage
Cash Fund Training	Approved	Active	Compliance	Standard		2023/01/11 15:51	View Manage
Cash Fund Training	Incomplete	Active	Compliance	Standard		2023/01/11 15:42	View Wizard
2023 Conflict of Interest	Approved	Active	Compliance	Standard		2023/01/11 09:41	View Manage
2023 General Compliance Training	Approved	Active	Compliance	Standard		2023/01/11 09:14	View Manage
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard		2023/01/09 16:14	View Manage

Showing 161 to 170 of 188 entries Previous 1 ... 15 16 17 18 19 Next

a) If you click the **View** option, you will be able to see a full description for the course when you submitted it.

b) If you click the **Wizard** option, you will be able to update/correct anything from the course. This option will be available when the status is incomplete.

c) If you click the **Manage** option, you will be able to update/correct anything from the course. This option will be available when the course has been submitted and if denied, you will use this option.

5) When the course has been **approved/denied** by a Committee member, you will receive an automated email notification.

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To:
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

Approved By:

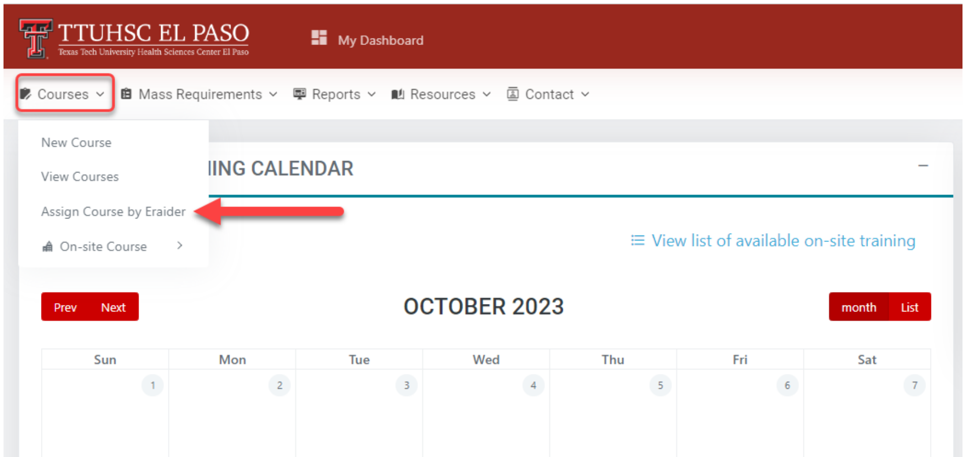
Approved Date: 12/31/2022

Comments:

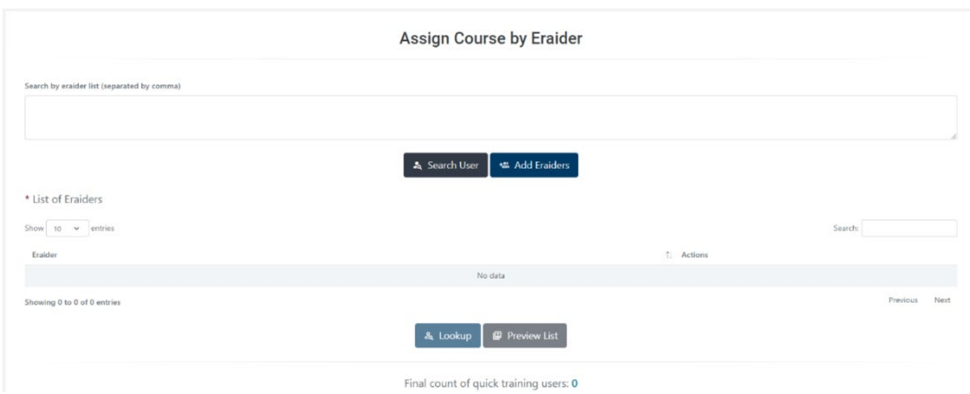
approve

COURSES – ASSIGN COURSE BY ERAIDER

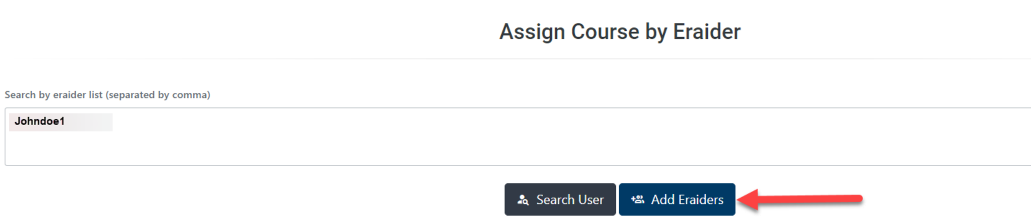
1) To create a course by eRaider, click on the **Courses** dropdown section, located on top of the page, then click on **Assign Course by eRaider**.



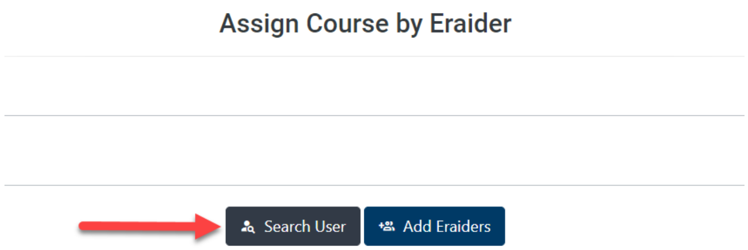
2) This will take you to the **Assign Course by eRaider** page.



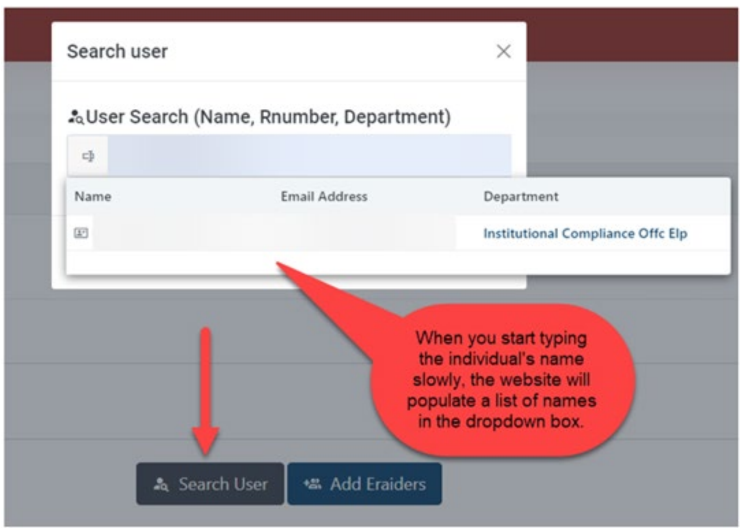
3) In the **Search by eRaider list** section, you can enter each eRaider individually (separated by commas). After you have entered all eRaiders that require training, click on **Add eRaiders** box at the bottom of the page.



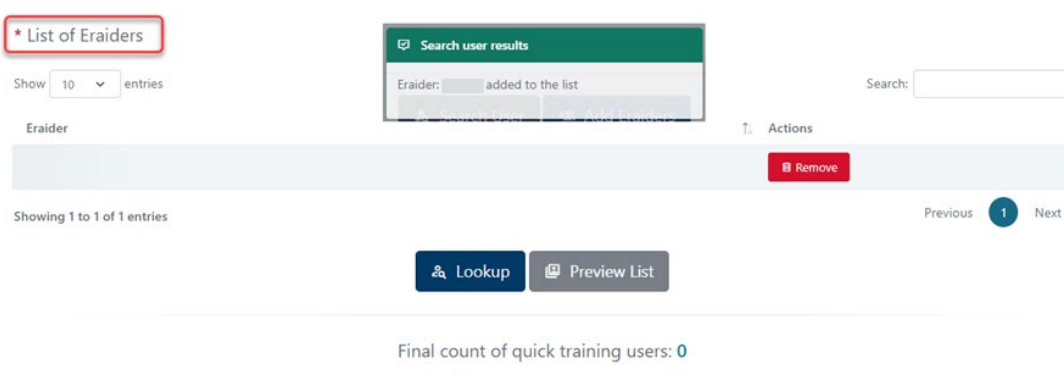
4) If you do not know the eRaiders for the individuals that require training, you can look up the individual in the **Search User** box.

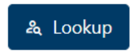


5) When you use the **User Search** box, a pop-up window will appear. In this section you can search by **name, r number** or **department**. You will have a dropdown list of names to choose from.

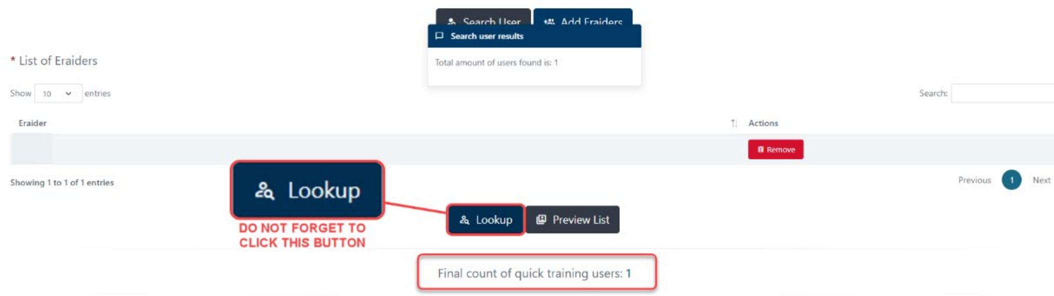


6) When you select the individual's name a pop-up screen will appear, after that, their eRaider will be added to the **List of eRaiders** section.

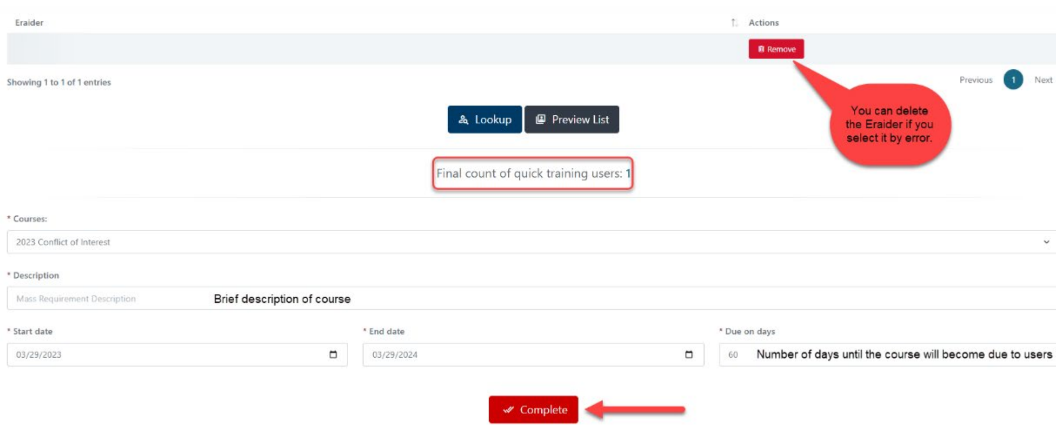


7) After making the selection of the users, click on the  button. This will give you a count of the users that will have the course assigned.

- If you click on the **Preview List** button, you will see a list of the users that have been selected.



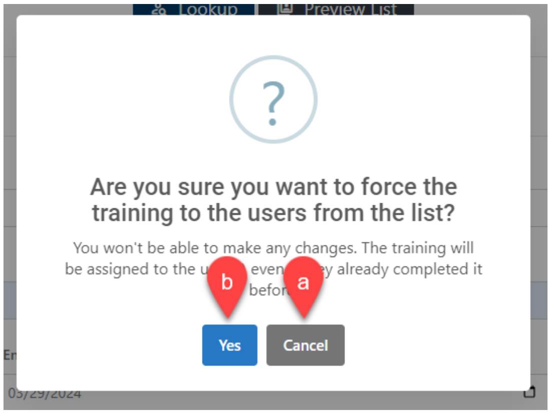
8) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Complete**.



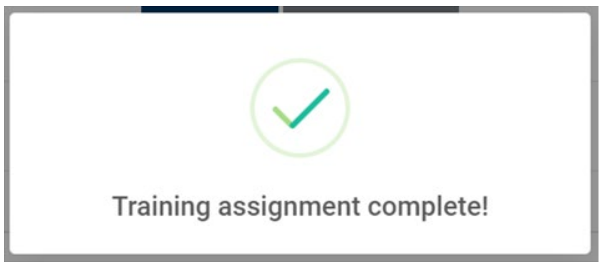
9) Next, a pop-up window will appear.

a) Click **Cancel** to stay on **Assign Course by eRaider** section.

b) Click **Yes** to proceed.



10) A pop-up notification will appear to confirm your submission.

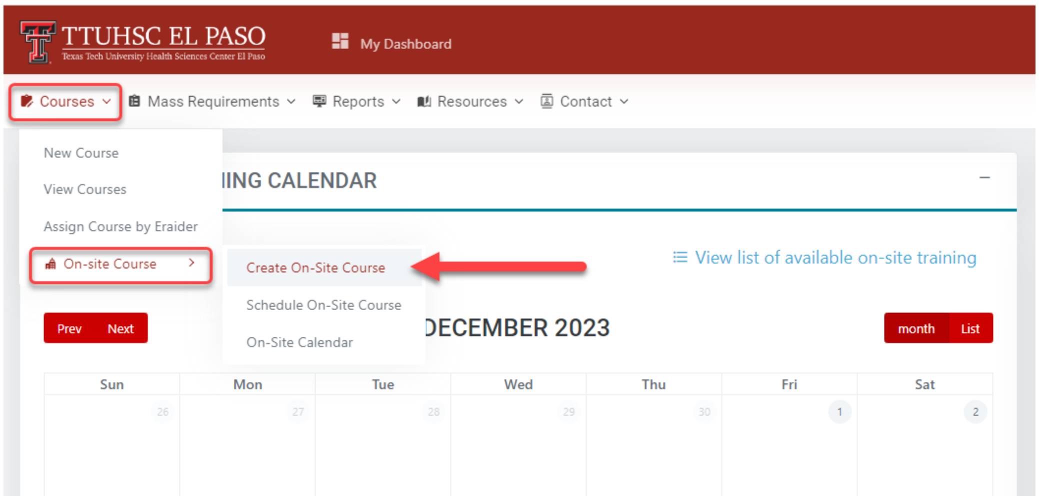


COURSES – CREATE ON-SITE COURSE

This feature will allow the user to create a course outline for individuals to register for a live, WebEx or online training session. Individuals will be able to self-enroll via the Tech Training application calendar.

Note: This feature will only be available for PowerUser, Administrator, and Committee roles.

1) To create an On-Site Course, click on the **Courses** dropdown → **On-Site Course** → then click on **Create On-Site Course**. You will see the following screen:



2) You will be directed to the **Create New On-Site Course** screen. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

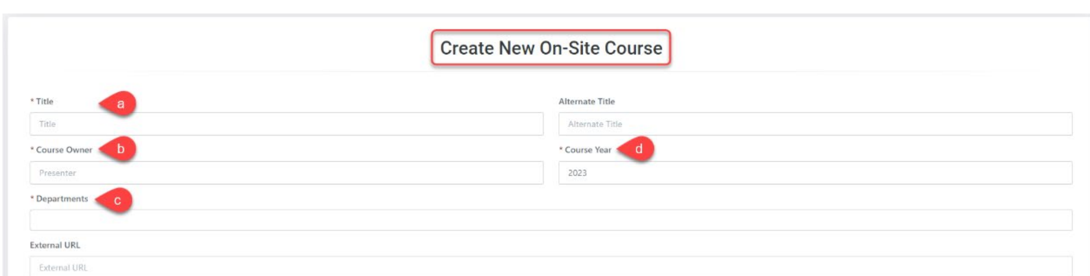
   a) **Title** – Enter your desired title.

      - **Alternate Title** – This field can be left blank or you can type in the same as the Title.

   b) **Course Owner** – Type the name of the person presenting the training.

   c) **Departments** – Choose the departments that will be able to see the course.

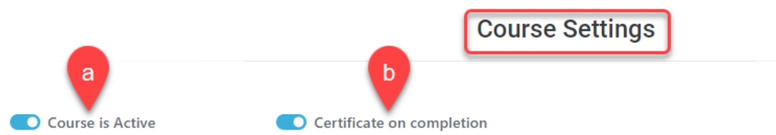
   d) **Course Year** – Select the current year.



3) Next, scroll down the page and in the **Course Settings** section:

a) Leave the **Course is Active** toggle button blue if you want everybody to see the course. If disabled, only the individuals with Administrator and PowerUser role will be able to see the course.

b) Leave the **Certificate on completion** toggle button blue so the users can download the certificate after passing the training.



4) In the **Course Details** section, fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

a) **Course Description** – enter a short description of the course.

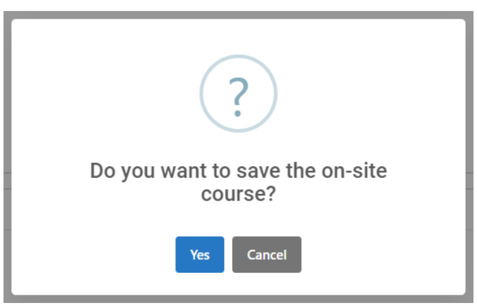
b) **Objectives** – outline the goals for the user upon the completion of this course.

c) **Outline** – enter a general description of the course content and instructions.

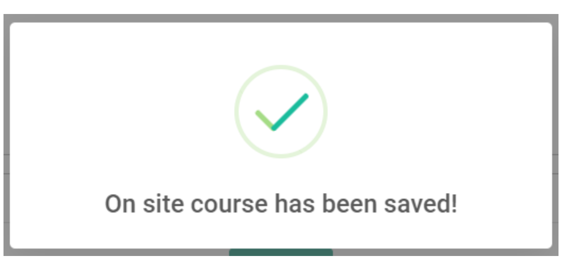
5) Click on the 

button to continue.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the **Create New On-Site Course** screen, click **Cancel**.*



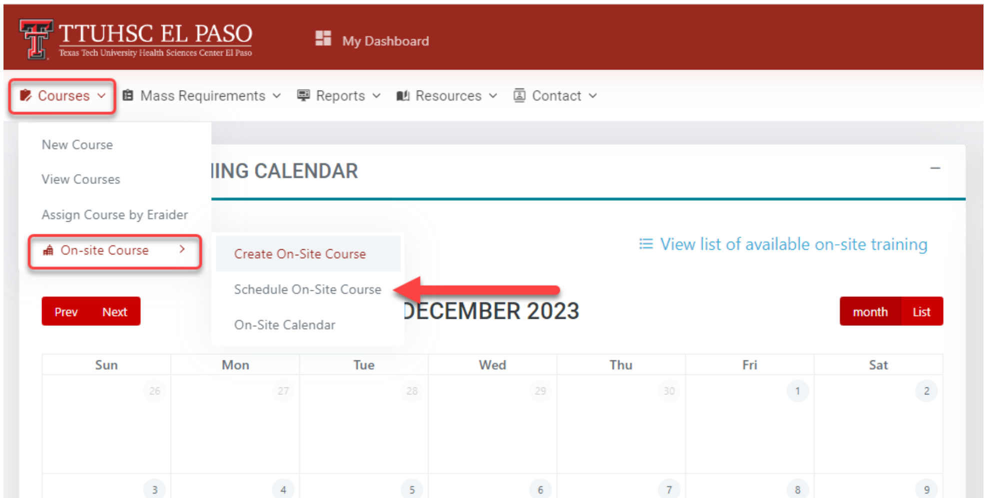
7) Once you click **Yes**, you will see the pop-up screen below confirming the course has been saved.



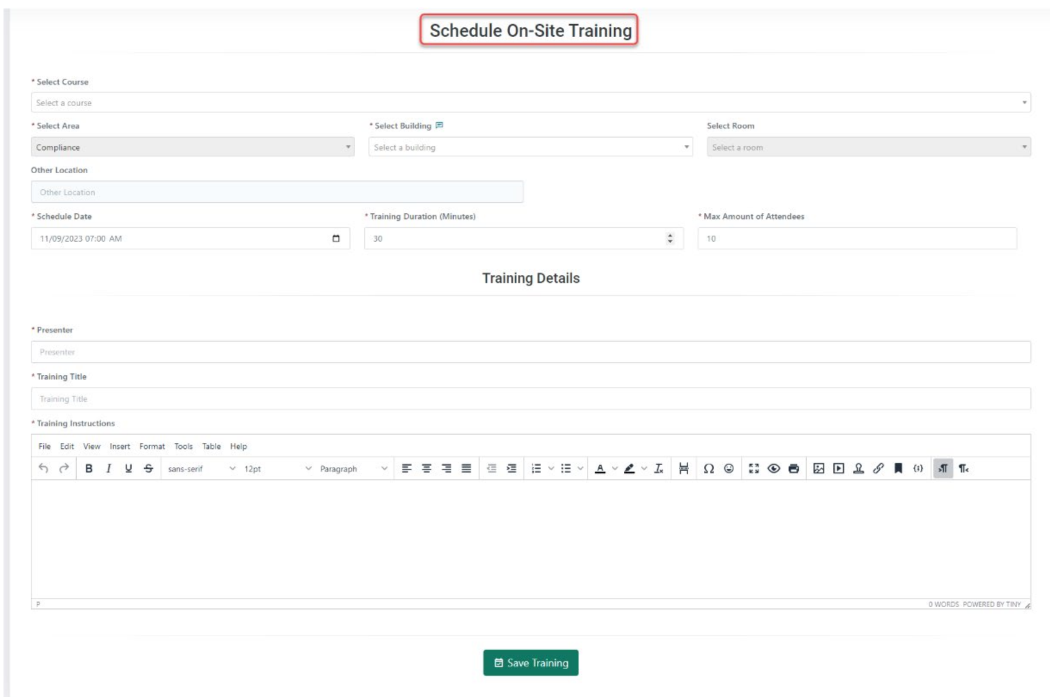
COURSES – SCHEDULE ON-SITE COURSE

This feature will allow users to set a time and place for the On-Site courses created.

1) To set a time and place for your course, click on the **Courses** dropdown → **On-Site Course** → then click on **Schedule On-Site Course**.



2) You will be directed to the **Schedule On-Site Training** screen.



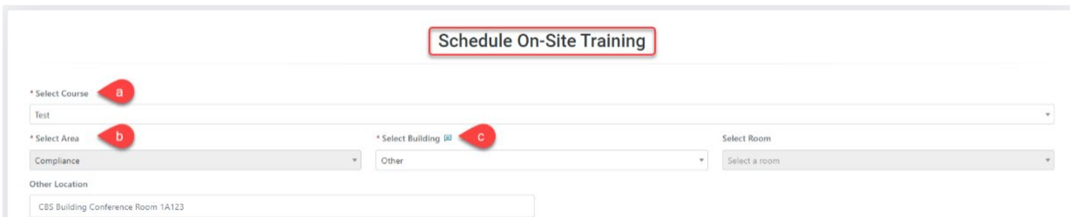
a) **Select Course** – In the dropdown field, select the training you created.

b) **Select Area** – This field will automatically populate with your department.

c) **Select Building** – In the dropdown field, select the building that the training will be scheduled at for users to attend. If your desired building is not listed, select the **Other** option. Once the building is selected, you will be able to select the room.

- **Select Room** – In the dropdown field, select the room number.

- **Other Location** – If you choose the **Other** option in the **Select Building field**, type your desired building and room number.

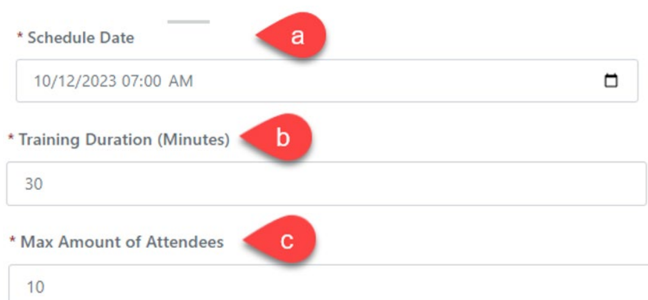


3) Scroll down and fill in the following fields.

a) **Schedule Date** – Select the date and time of the training session.

b) **Training Duration** – Indicate the length of time, in minutes, the training will take.

c) **Max Amount of Attendees** – Indicate the maximum amount of people that can attend the training session.



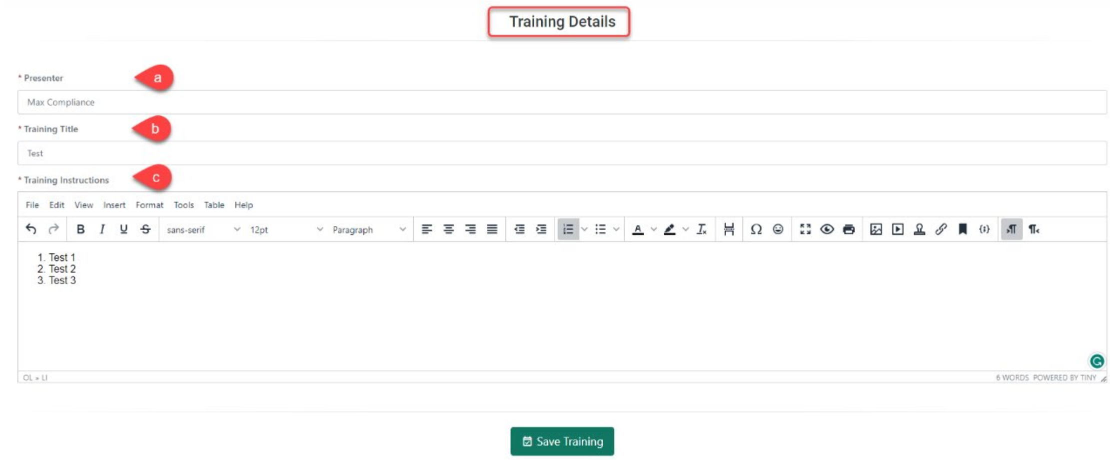
4) Next, go down the page and in the **Training Details** section, fill out the required fields.

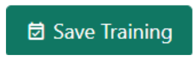
Note: Required fields are identified by an asterisk (*).

a) **Presenter** – Name of the person who is presenting the training.

b) **Training Title** – Type the name of the course you created.

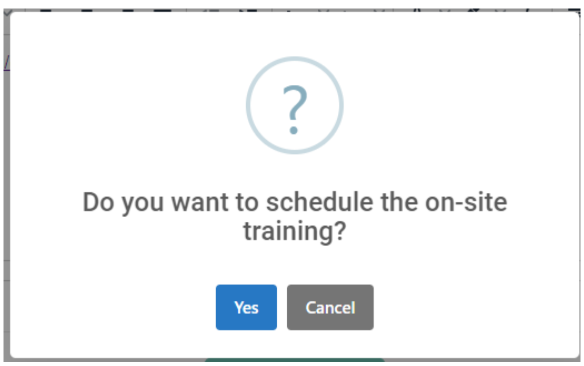
c) **Training Instructions** – Indicate what the users are going to do in the training session or if they will need to log in to web-based training.



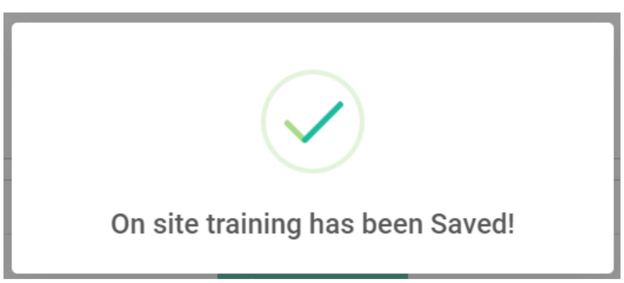
5) When you are ready, click on the 

button.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Schedule On-Site Training screen, click **Cancel**.*



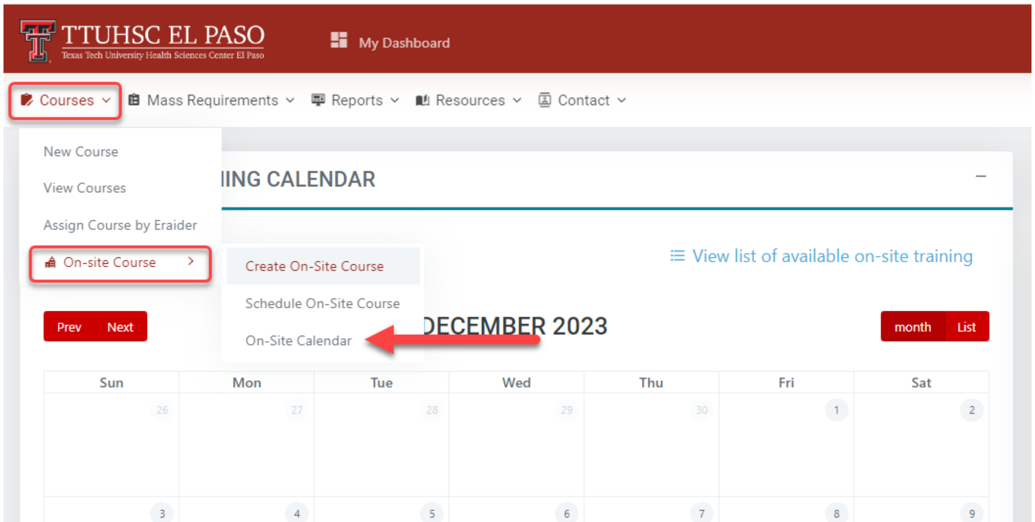
7) Once you click **Yes**, you will see the pop-up screen below confirming the On-Site training has been saved.



COURSES – ON-SITE CALENDAR

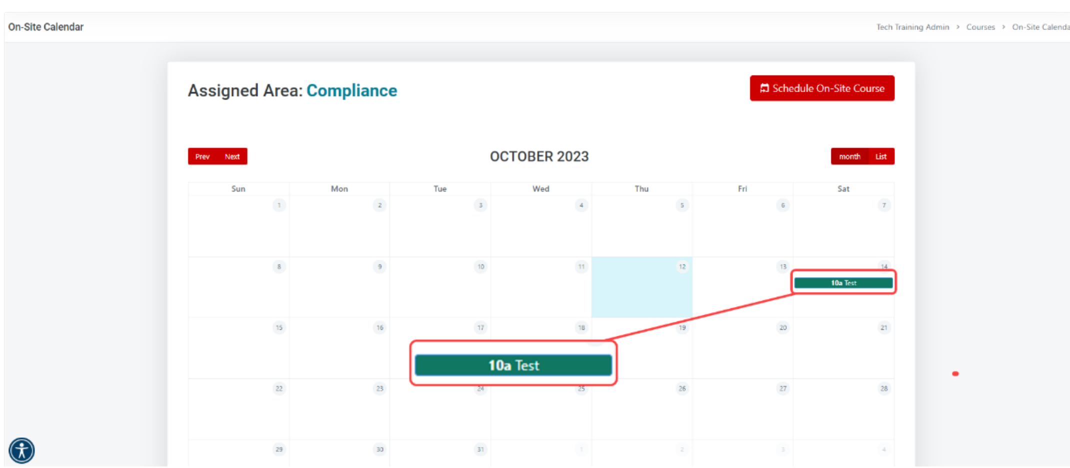
This feature will allow the user to modify/update the **On-Site Training** details such as the course, area, location, duration, training instructions, etc.

1) To see the **On-Site Calendar**, click on the **Courses** dropdown → **On-Site Course** → then click on **On-Site Calendar**.

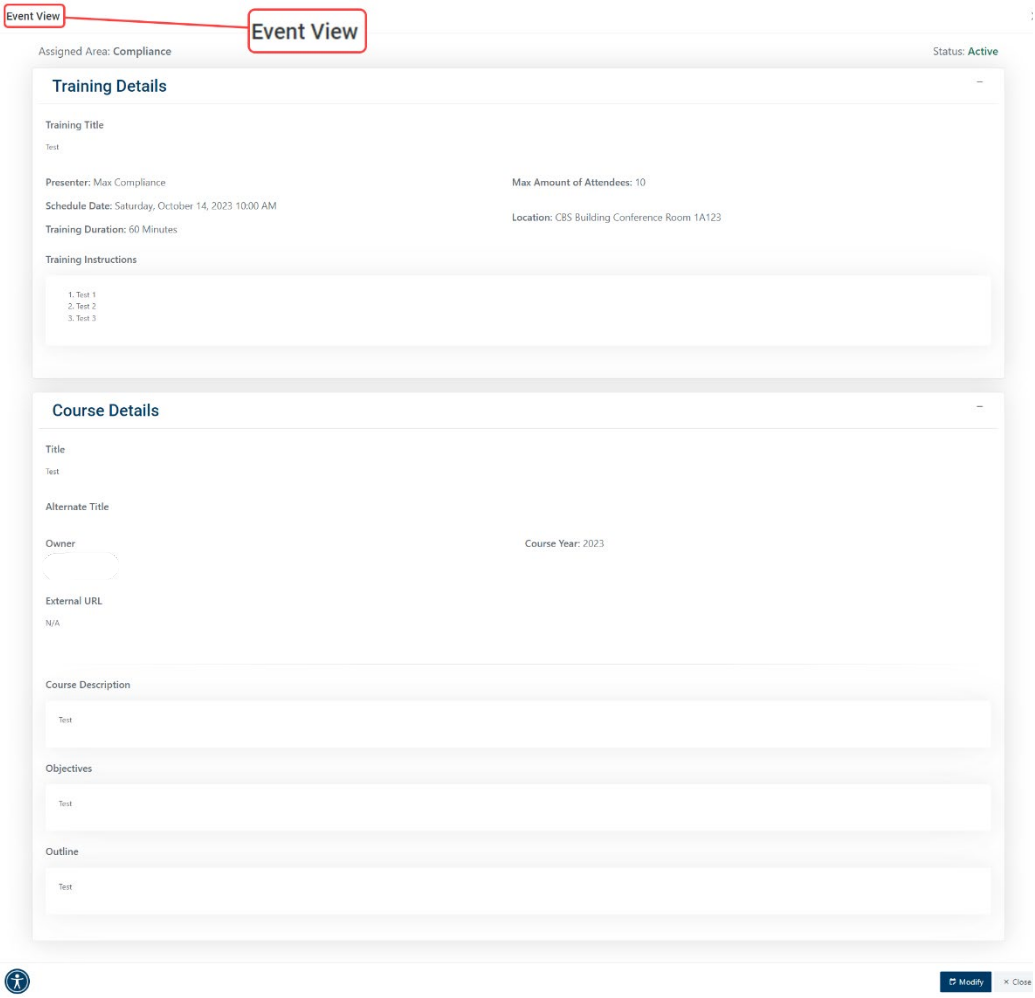


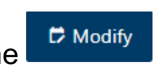
2) You will be directed to the **On-Site Calendar**. The available courses will appear in the calendar.

   a) If you want to see the details for that course, click on the name of the course.



3) Next, you will see the **Event View** screen. In this page you will be able to see all details for that course.



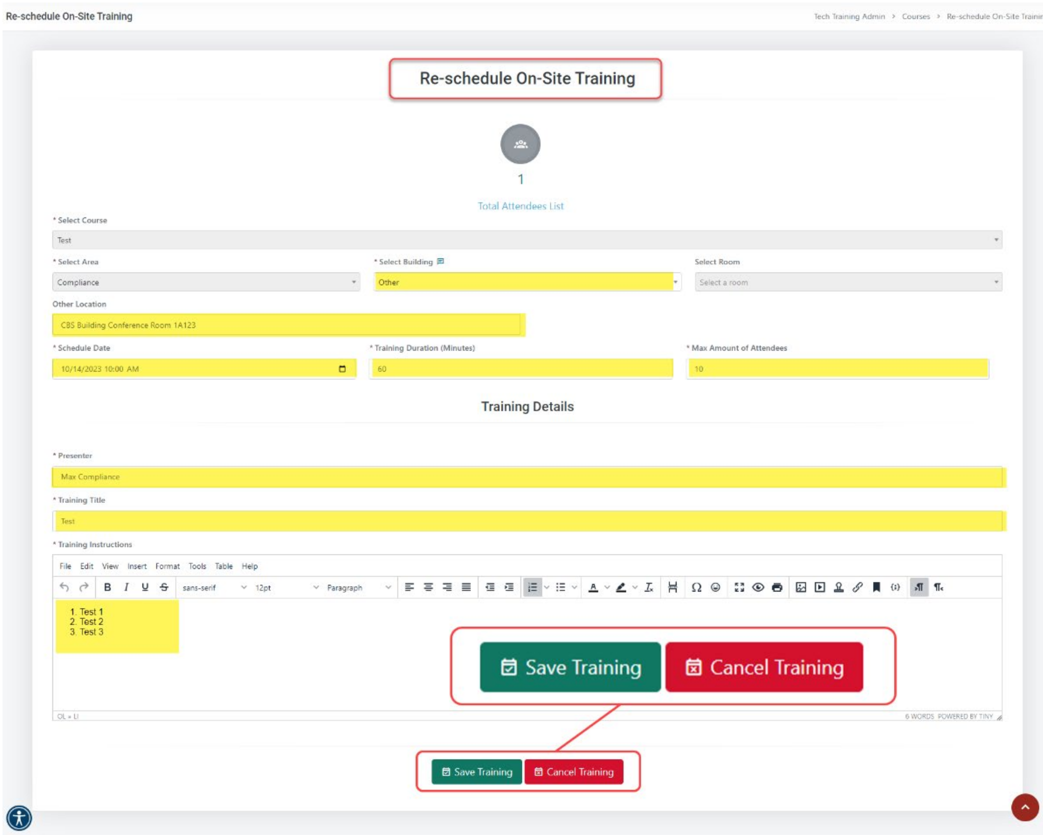
4) To modify/update the information for the course, click on the 

button at the bottom of the page.

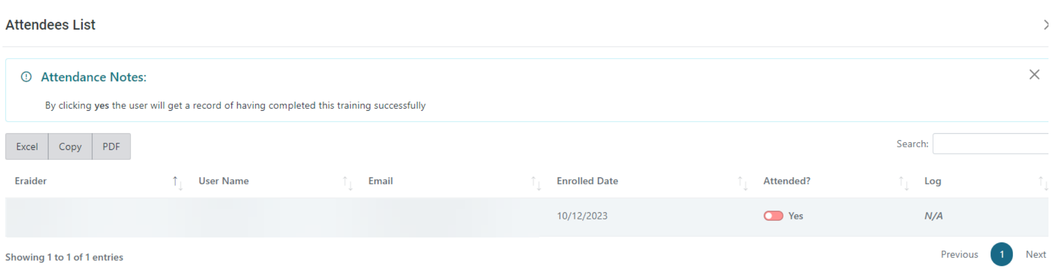
5) You will be directed to the **Re-schedule On-Site Training** page. You can change/update the building, location, date, duration, and number of attendees, presenter, title, and instructions.

Note: Do not forget to click on Save Training if you change/update any information. You can also cancel the training if desired.

Back to Top



a) To see the list of attendees, click on the Total Attendees List link at the top of the page. You will see the following list:

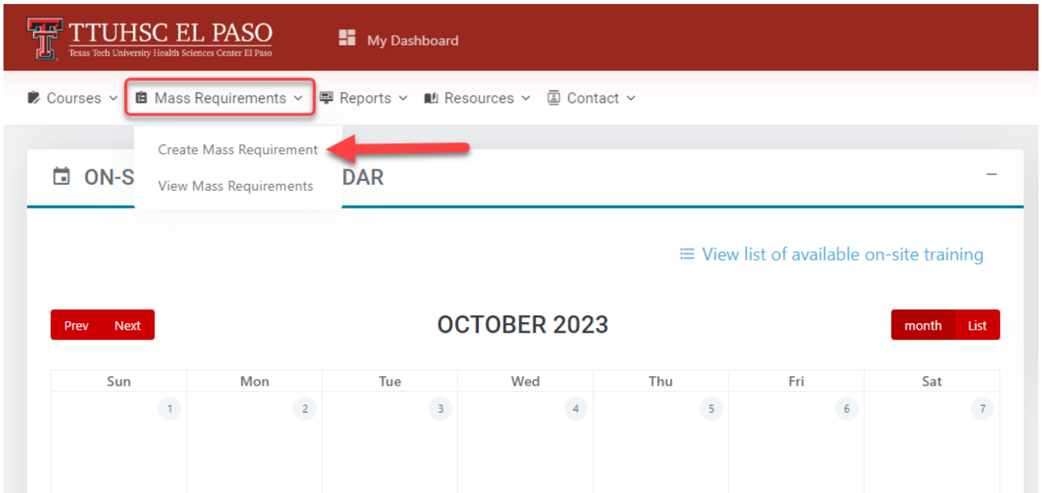


Note: If the training has ended, you can no longer make changes to the training.

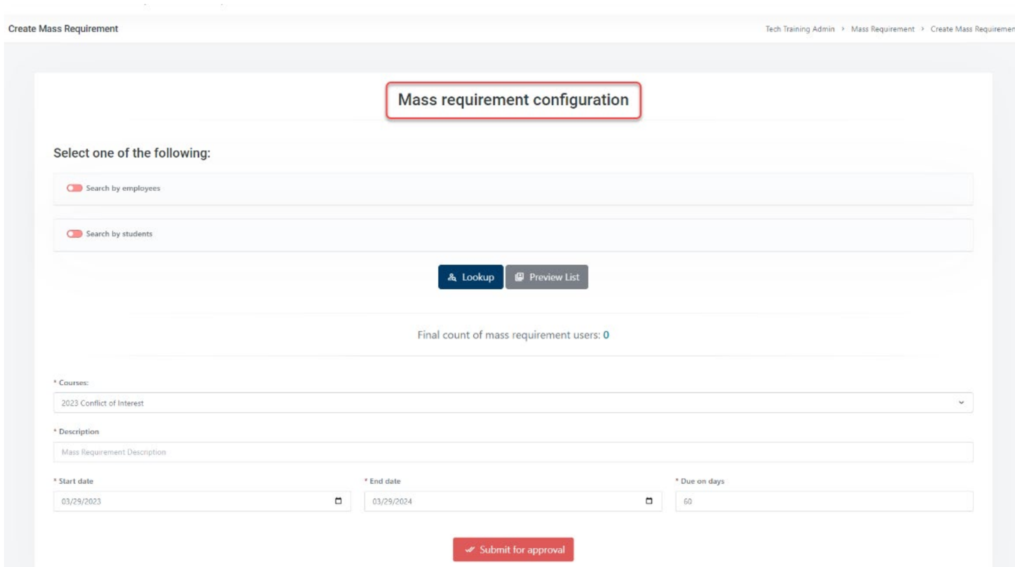
b) At this point, the presenter can confirm attendance by clicking in the **Yes** toggle button in the **Attended?** Column. This gives the user credit for attending the training.

MASS REQUIREMENT – CREATE A MASS REQUIREMENT

1) To create a Mass requirement, click on **Mass Requirements** dropdown section, located on top of the page, then click on **Create Mass Requirement**.



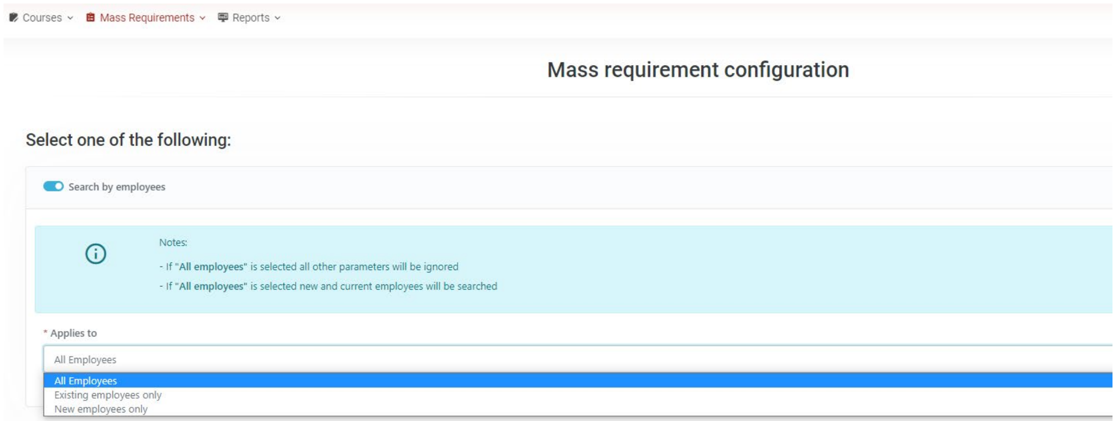
2) This will take you to the **Mass requirement configuration** page.



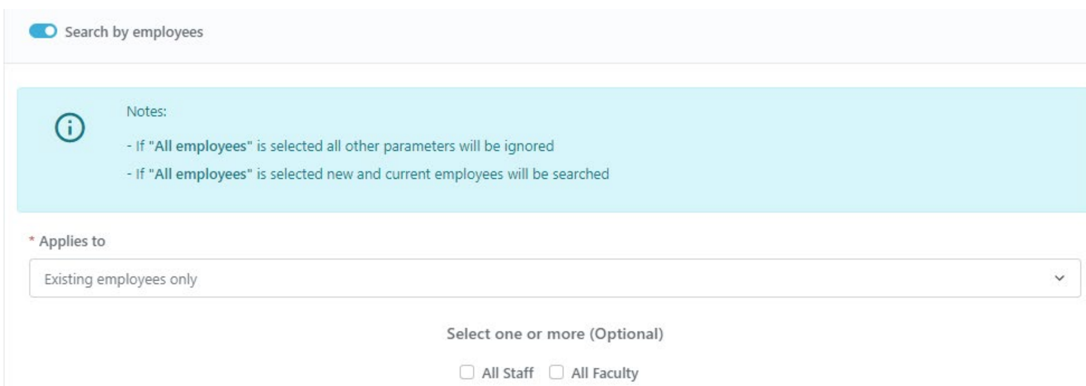
3) To use **the Search by employees** option:

   a) In the **Applies to** dropdown menu, you will be able to select **All Employees**, **Existing employees only** or **New employees only**.

      - The **All Employees** option will allow you to select all employees.



b) If you select **Existing employees only** or **New employees only**, you will have the option to choose **All Staff** or **All Faculty**. You may select both options at the same time, if needed.



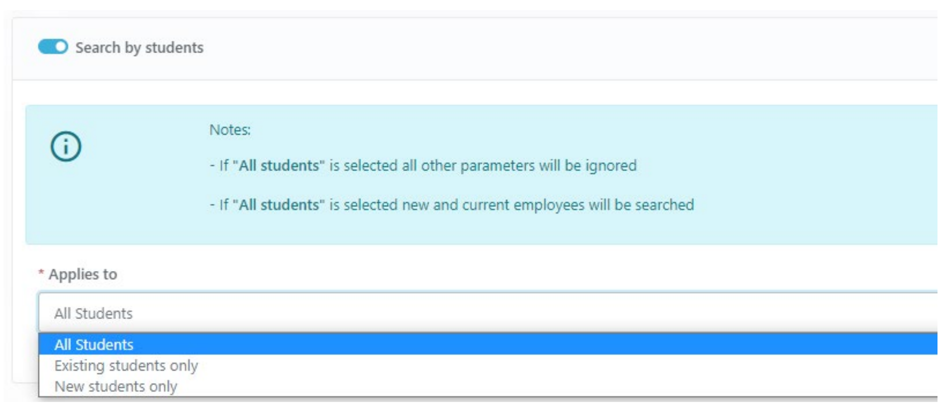
c) If you select **Existing employees only** or **New employees only:**

- You will have the option to select the department under the **Select a department** dropdown box and the positions under the **Select a position** dropdown box.

4) To use the **Search by students** option:

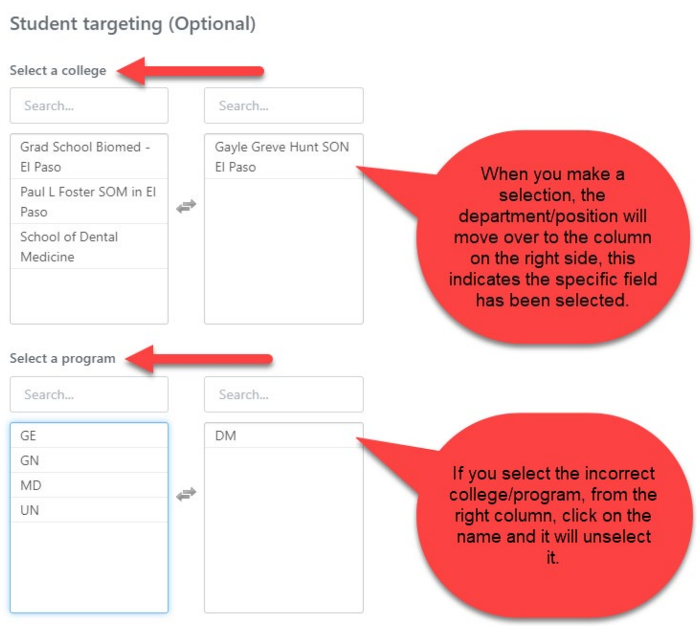
a) In the **Applies to** dropdown section you will have 3 options: **All Students, Existing students only** and **New students only**.

- The **All Students** option will allow you to select all students.



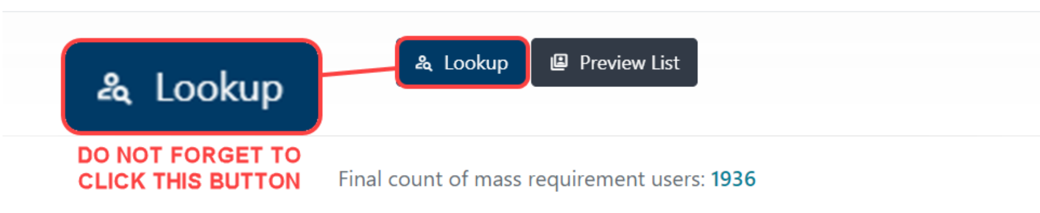
b) If you select **Existing Students only** or **New students only**:

- You will have the option to select any **college/program**. Click on the desired college/program under the **Select a college** and **Select a program** dropdown boxes.

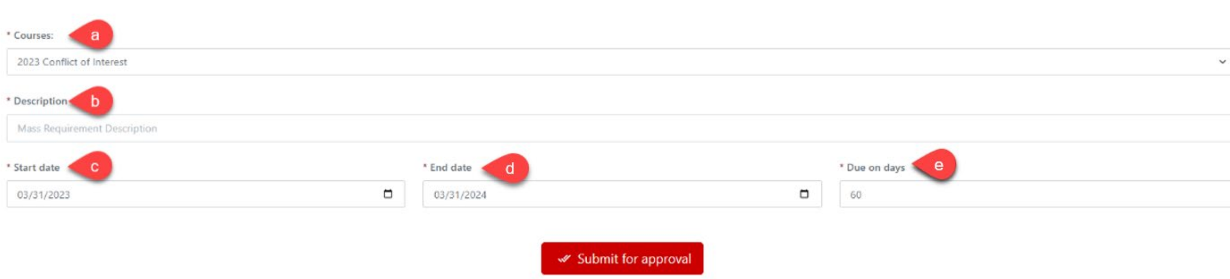


5) After making the selection of the users, click on the  button. This will give you a count of the users that will be assigned to the mass requirement.

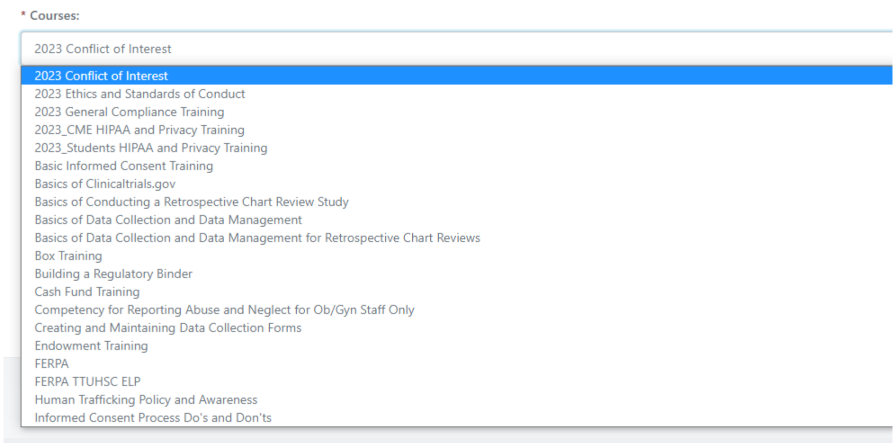
- If you click on the **Preview List** button, you will see a list of the users that will be assigned to the mass requirement.



6) Next, you will scroll down to the bottom portion of the **Mass requirement configuration**.



a) The **Courses** section will have a dropdown list where you can select the course you need.



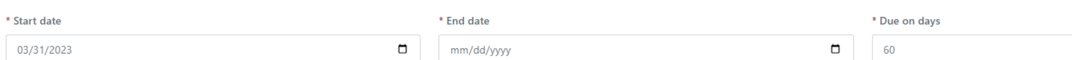
b) Enter a brief description in this section:

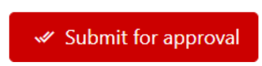
c) **Start date** – Enter the current date

*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

d) **End date** – enter the last day of the current calendar year. This ensures that the course remains active for the calendar year. (Remember, each calendar year you will be required to upload the course and obtain Committee approval.)

e) **Due on days** – Enter the number of days the users have to complete the course.



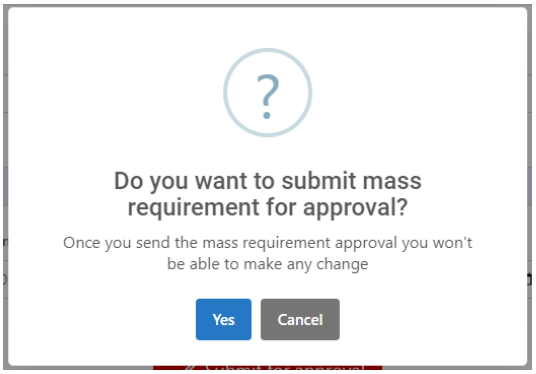
7) Once you have entered all the required fields, click on the 

button at the bottom of the page.

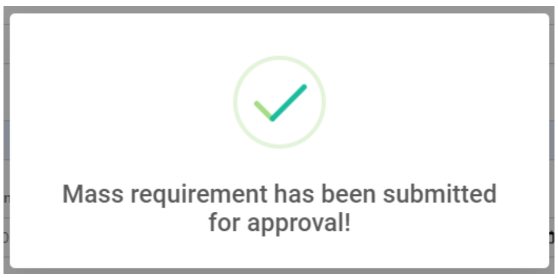
8) You will see the following pop-up:

a) If you are ready to submit the mass requirement, click **Yes** to submit for approval.

*Note: If you need to back to the **Finish** tab, click **Cancel**.*



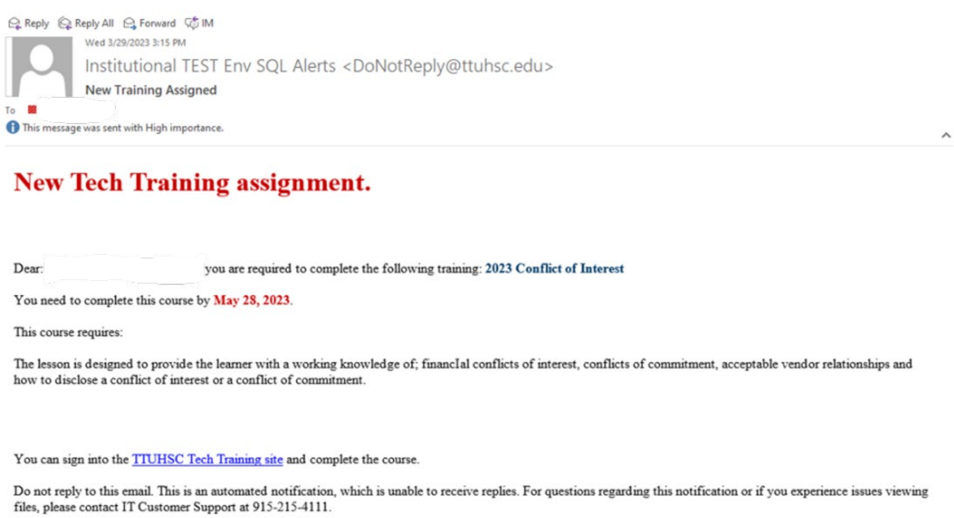
9) If you click **Yes**, you will see the following notification:



10) The **Mass Requirement** will be routed for approval to the Committee before the training is assigned.

11) To check on the **Mass Requirement** approval status, refer to the **Mass Requirement Report**.

12) Once the **Mass Requirement** has been approved by the Committee, the users will receive an email notification stating the training has been assigned.


Reply Reply All Forward IM
Wed 3/29/2023 3:15 PM
Institutional TEST Env SQL Alerts <DoNotReply@ttuhsc.edu>
New Training Assigned
To
This message was sent with High importance.

New Tech Training assignment.

Dear: you are required to complete the following training: **2023 Conflict of Interest**

You need to complete this course by **May 28, 2023**.

This course requires:

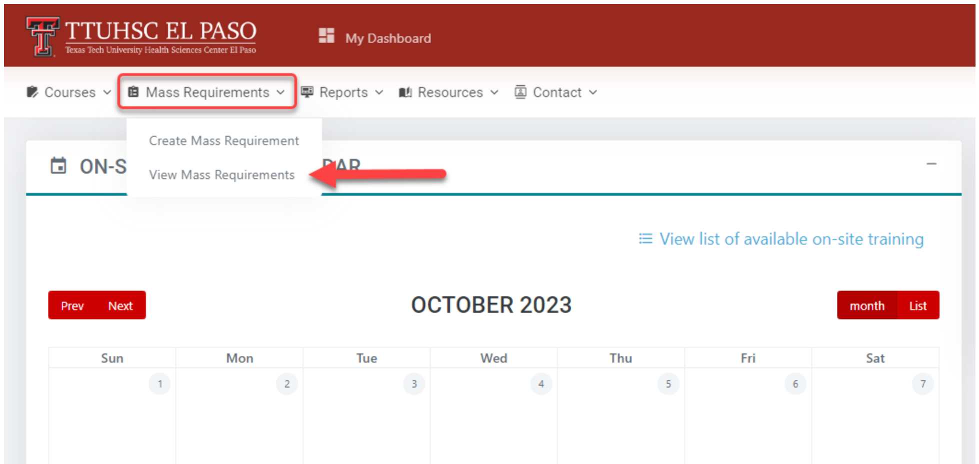
The lesson is designed to provide the learner with a working knowledge of; financial conflicts of interest, conflicts of commitment, acceptable vendor relationships and how to disclose a conflict of interest or a conflict of commitment.

You can sign into the TTUHSC Tech Training site and complete the course.

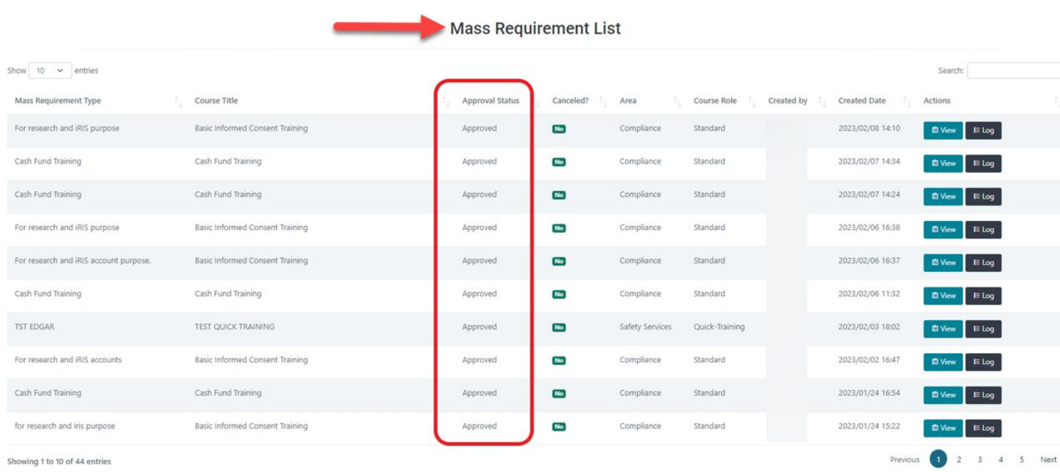
Do not reply to this email. This is an automated notification, which is unable to receive replies. For questions regarding this notification or if you experience issues viewing files, please contact IT Customer Support at 915-215-4111.

MASS REQUIREMENT – VIEW MASS REQUIREMENT

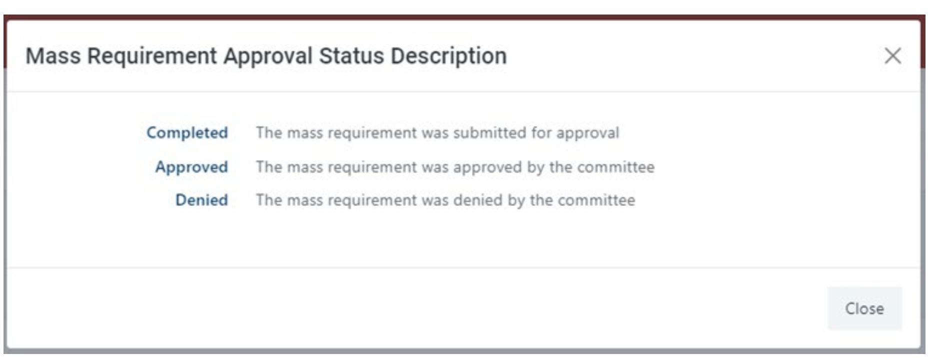
1) To check the status of a mass requirement, go to the **Mass Requirement** dropdown and click on **View Mass requirements**.



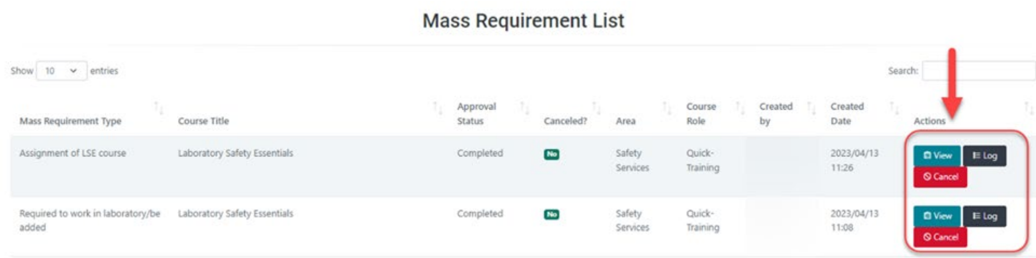
2) This will take you to the **Mass Requirement List** where you can check the status of the assignment in the **Approval Status** column.



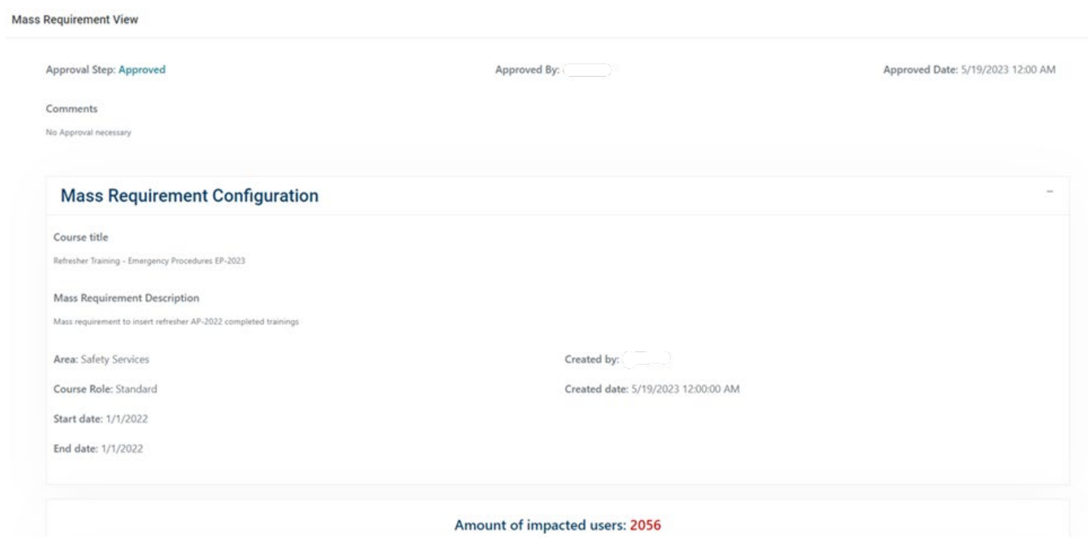
a) Click on the top right side of the page to see the **Approval Status Descriptions**.



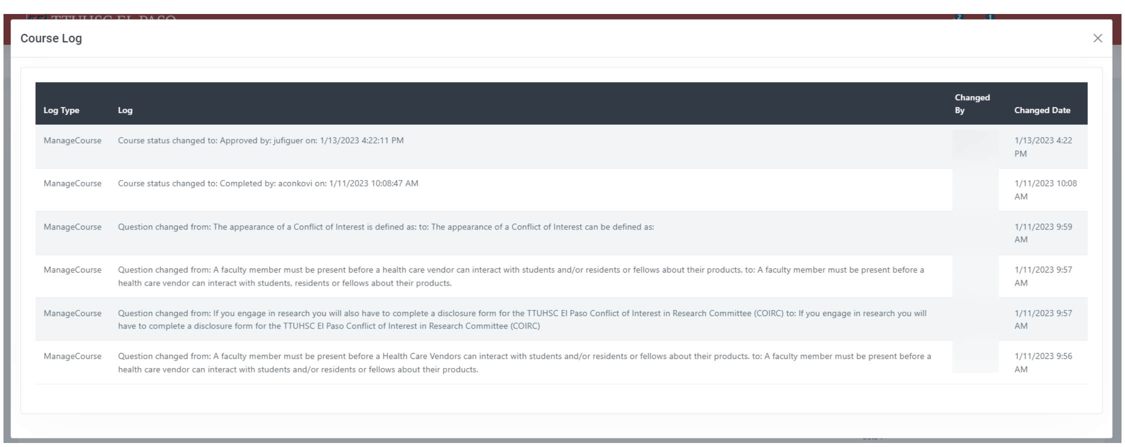
3) In the **Actions** column, you can select **View**, **Log or Cancel** buttons.

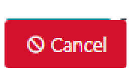


a) If you click on the **View** button, you will be able to look at detailed information entered in the **Mass Requirement**.



b) The **Log** button will show you the **Course Log**. This section will display the history of the **Mass Assignment**.

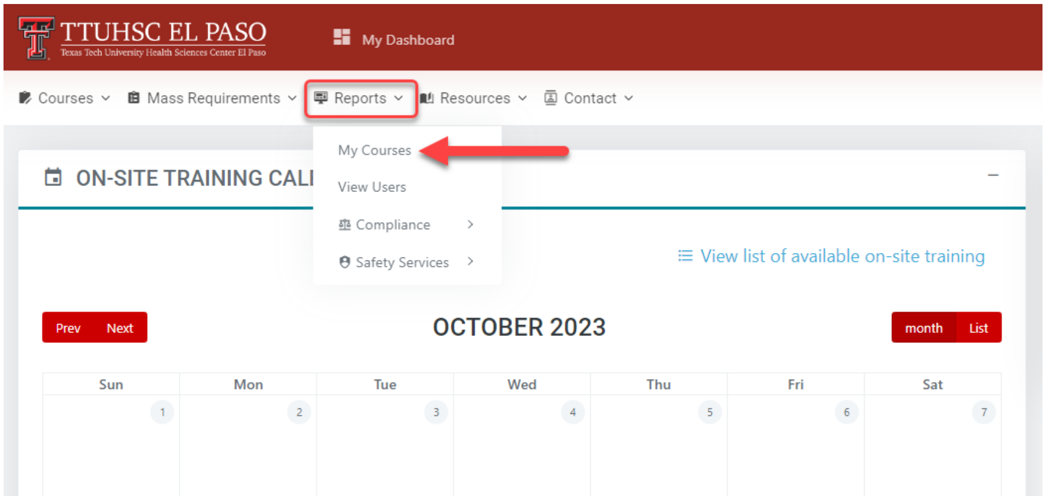


c) The 

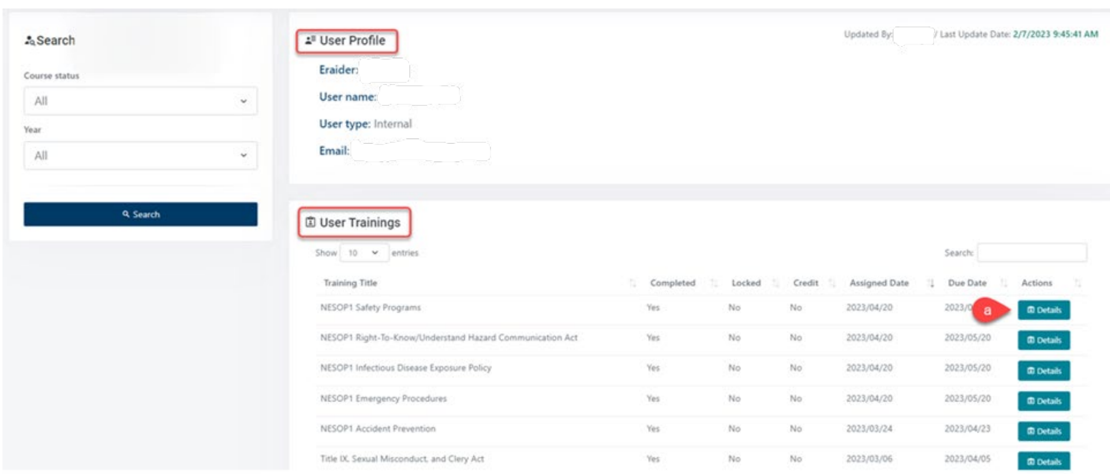
button will delete the mass requirement.

REPORTS – MY COURSES

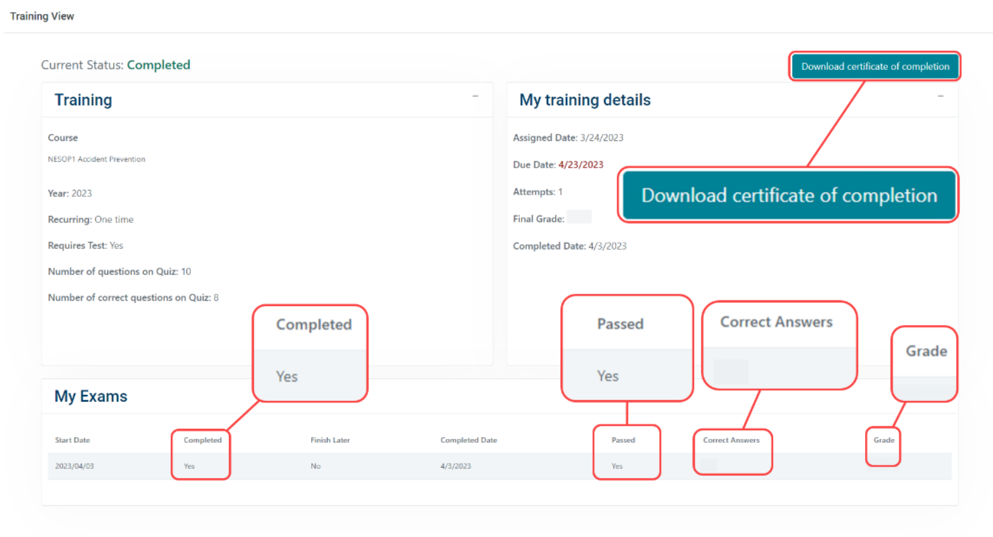
1) To check your profile and course status, click on **Reports** dropdown section, located on top of the page, then click on **My Courses**.



2) Next, you will see the following page. In this page you will find your personal information such as the **User Profile** and the **User Trainings**.

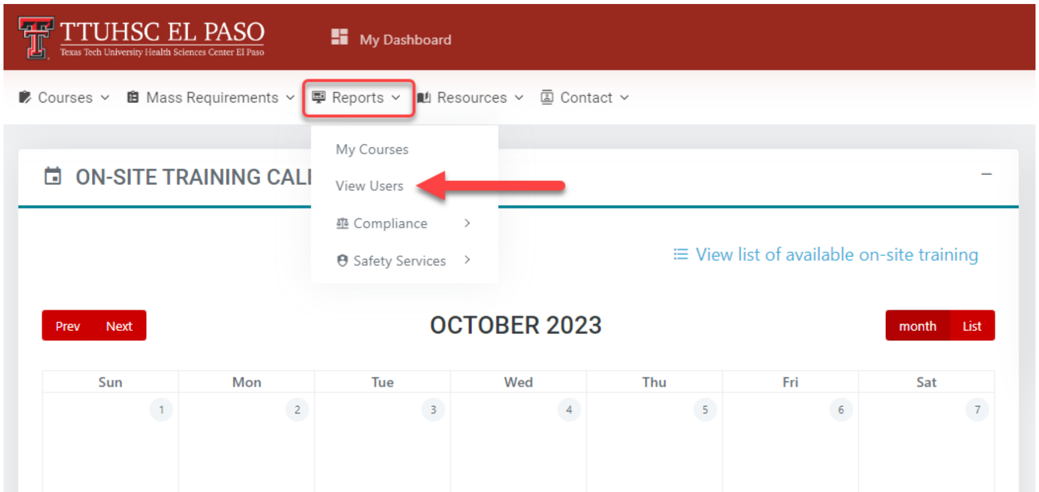


a) Under the **Details** button, you can get detailed information of the trainings you have been assigned. You can also **Download a certificate of completion**.

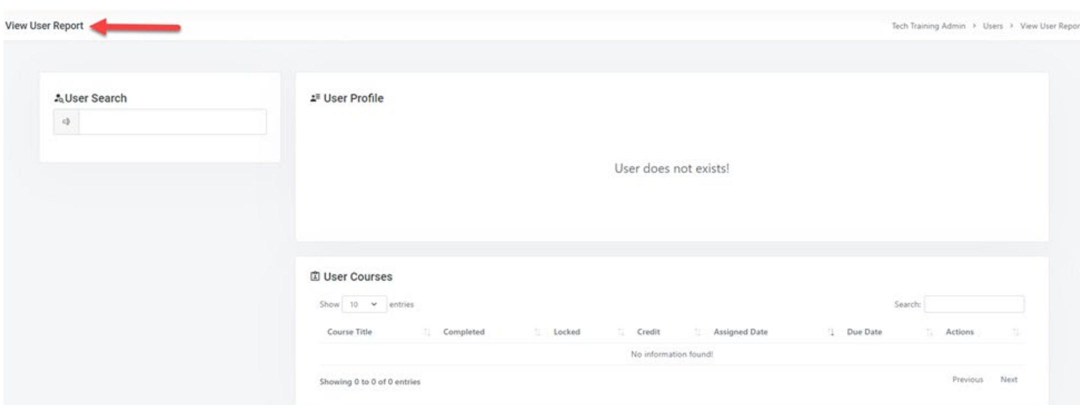


REPORTS – VIEW USERS

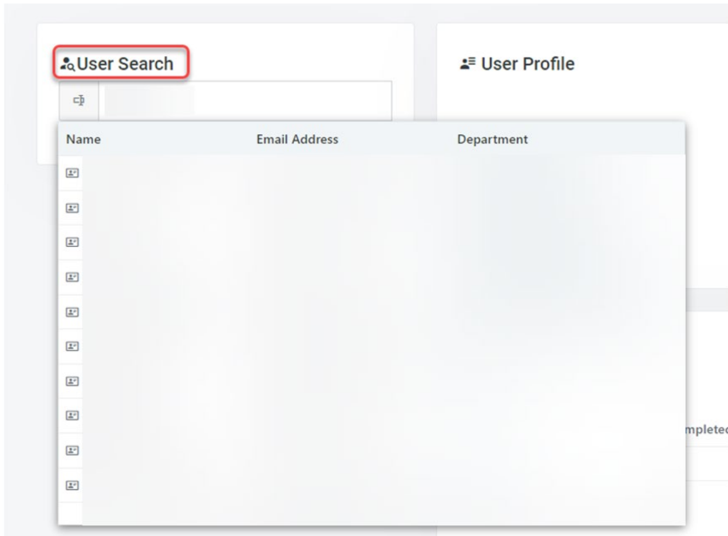
1) To search for users, click on **Reports** dropdown section, located on top of the page, then click on **View Users**.



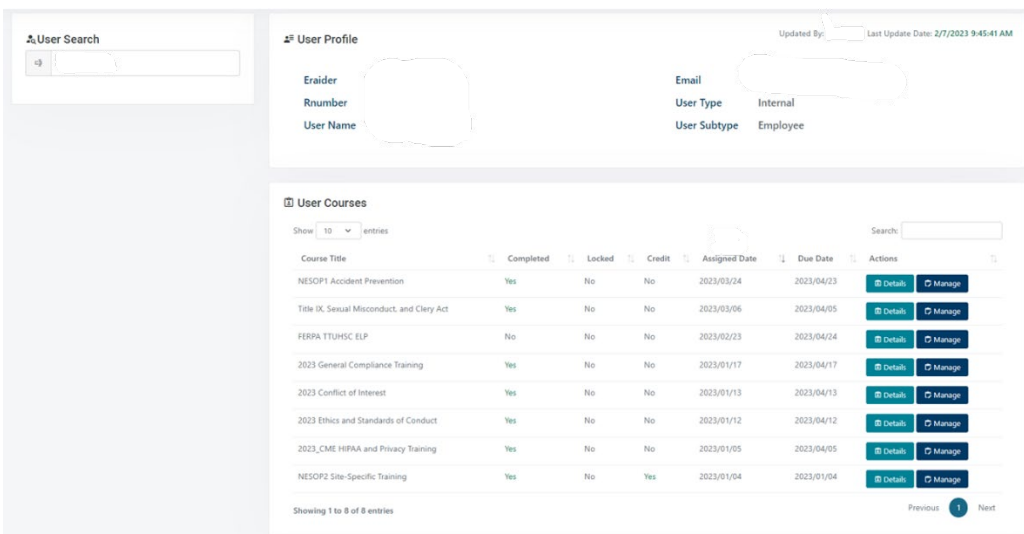
2) Next, you will find the **View User Report** page.



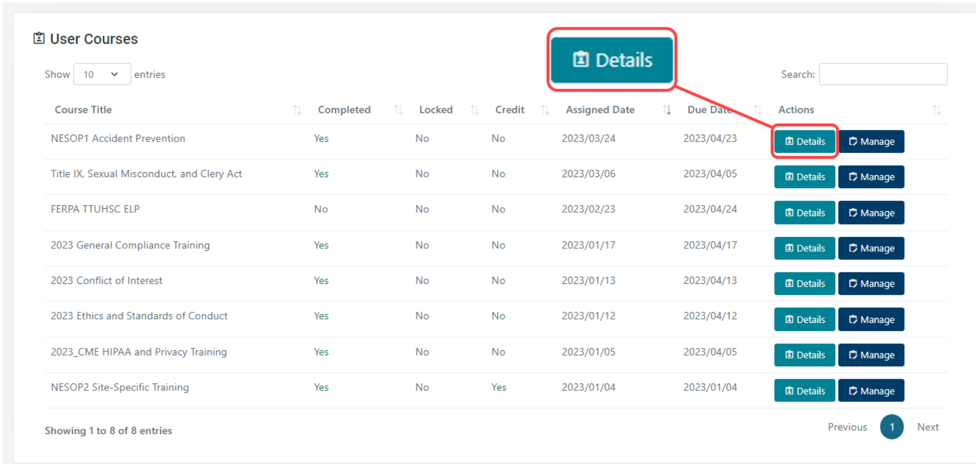
3) In the **User Search** section, you will have access to look for a specific individual with the **eRaider, first name** and/or **last name**. A list of names will appear in a dropdown box.



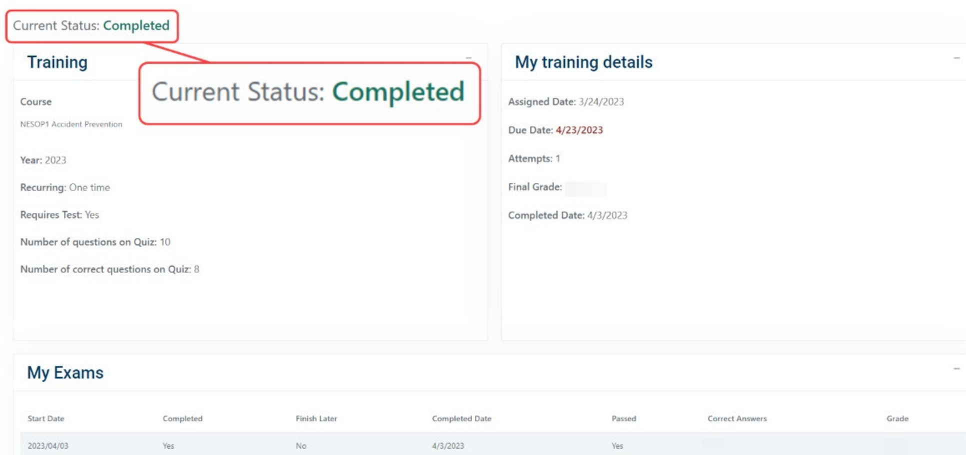
4) Select the name of the individual. The following page will display the **User Profile** and the **User Courses**.



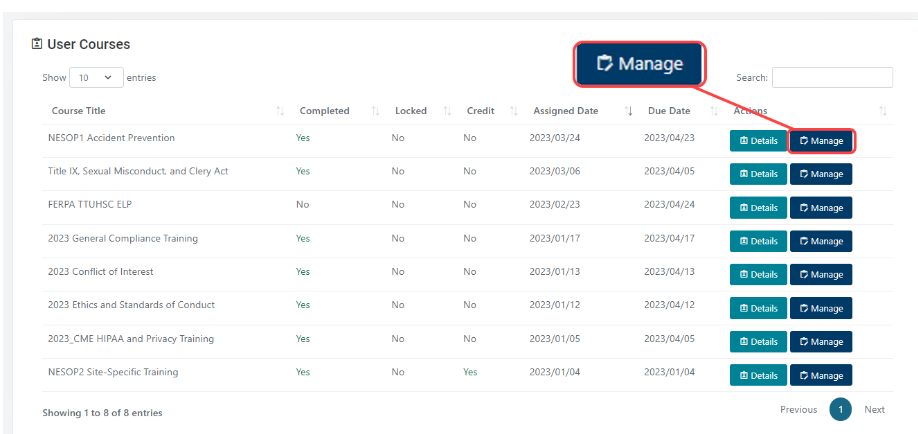
5) If you click on the **Details** button, it will direct you to the **View User Course Details** page.



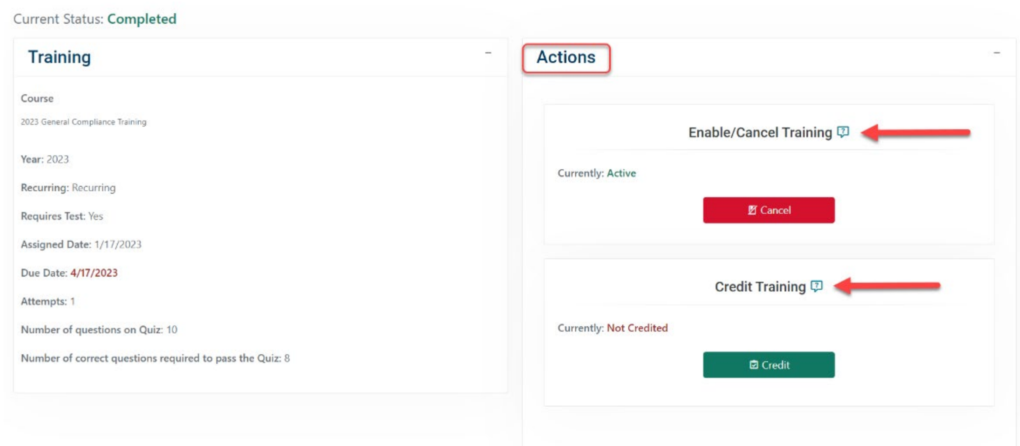
a) In this page you can see a detailed description of the trainings and exams the individual has taken.



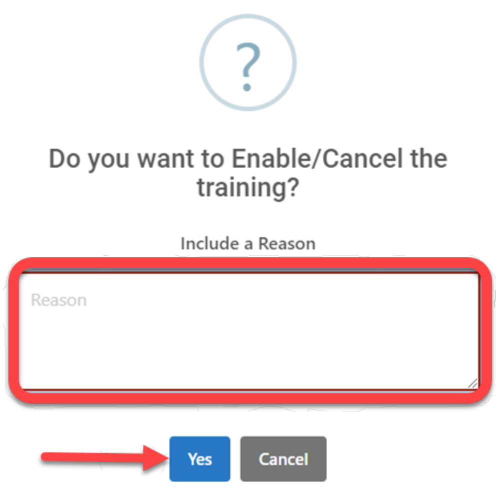
6) If you click on **Manage**, it will direct you to the **Manage User Course** page.



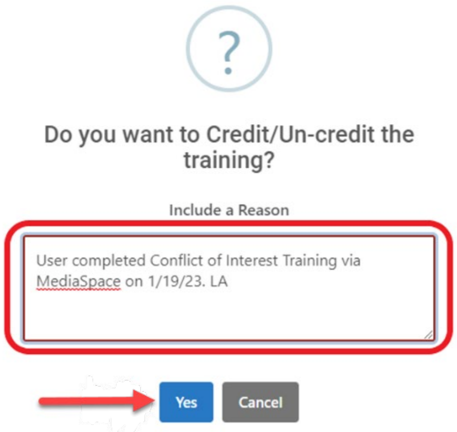
a) Under the **Actions** section, you will have two options, first you can **Enable/Cancel Training** and second, you can give credit to an individual by clicking on the **Credit Training** button.



7) **Enable/Cancel Training**: If you click on this section a pop-up screen will appear. You will have to give the reason you want to cancel the training. After you are finish, click **Yes.**

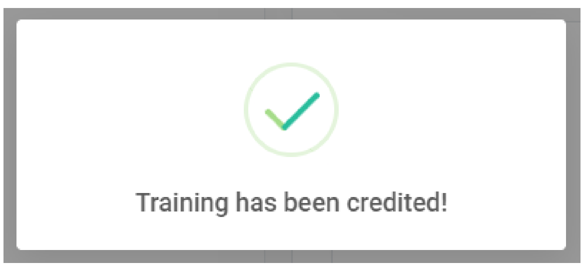


8) **Credit Training**: If you click on this section a pop-up message will appear. You will have to include a reason you want to give credit for the training. After you are finish, click **Yes.**

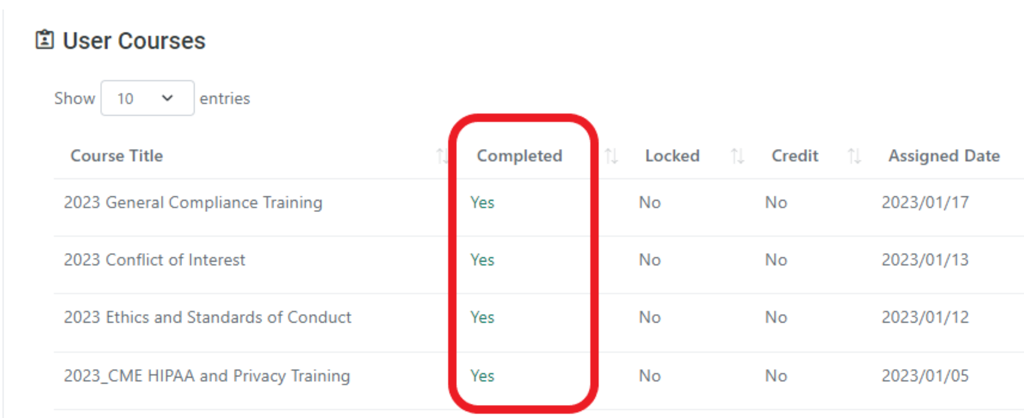


Note: Use the following template when including the reason; User completed (name of training) via MediaSpace or Canvas Catalog on (date). (Initials)"

a) Once you click on **Yes**, you will see the following pop-up notification.

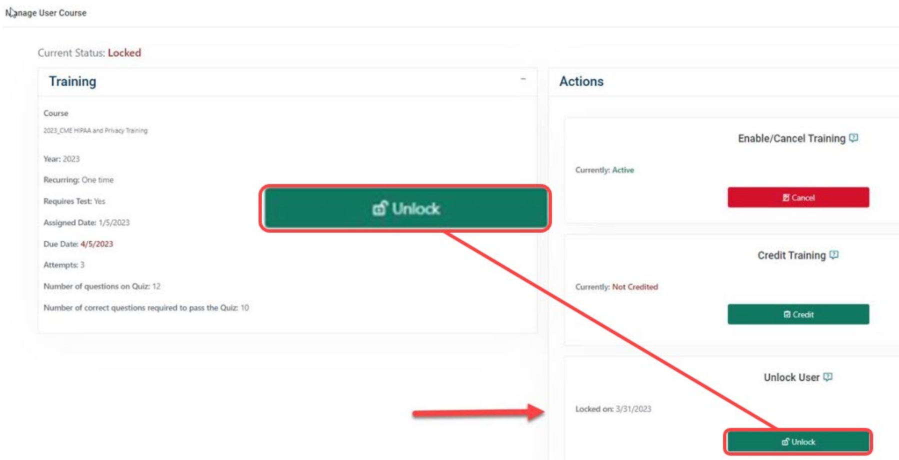


9) Next, under the **User Course** section you can verify if the credit was successfully applied to the training. Check for a **Yes** under the **Completed** section.



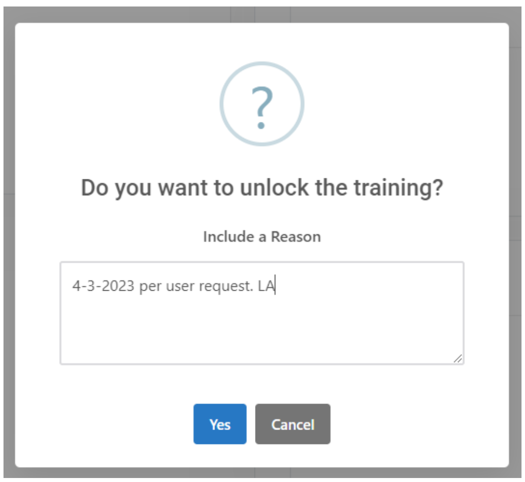
Course Title	Completed	Locked	Credit	Assigned Date
2023 General Compliance Training	Yes	No	No	2023/01/17
2023 Conflict of Interest	Yes	No	No	2023/01/13
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05

10) **Unlock User**: This option will display if the user has used all of their attempts and has not successfully passed the test, or if the user ran out of time. Click **Unlock.**

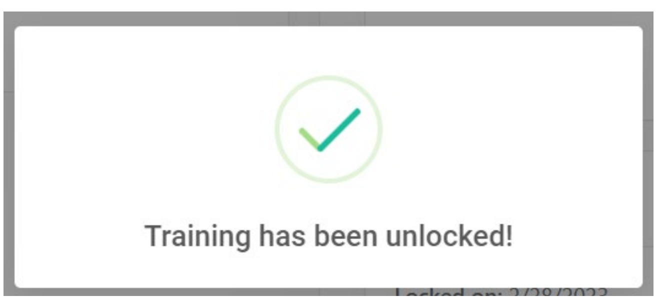


a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel**, if you made a mistake. Click **Yes** when you are ready.

- Make sure you enter a brief message before confirming **Yes**.



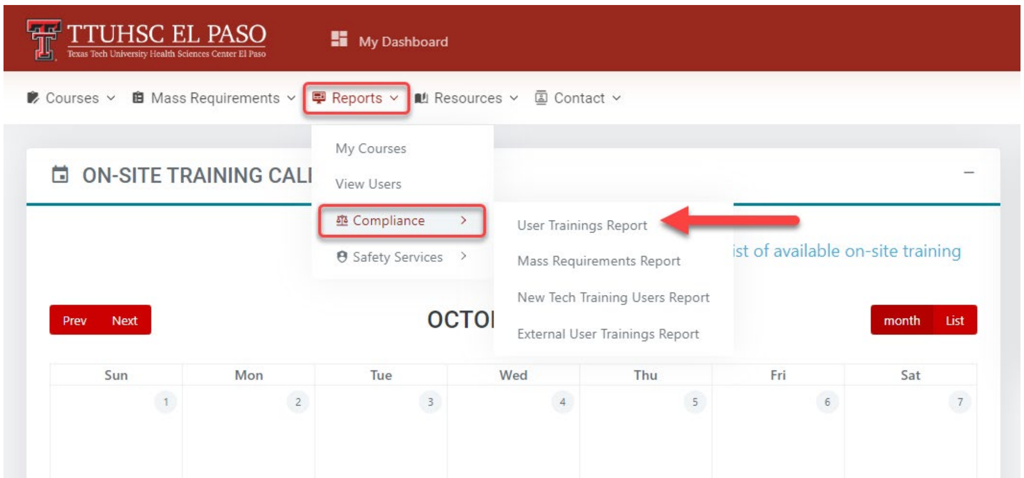
b) After you have clicked **Yes**, a pop-up notification will appear to confirm. You can go back to the **View User Report** to make sure the user was unlocked.



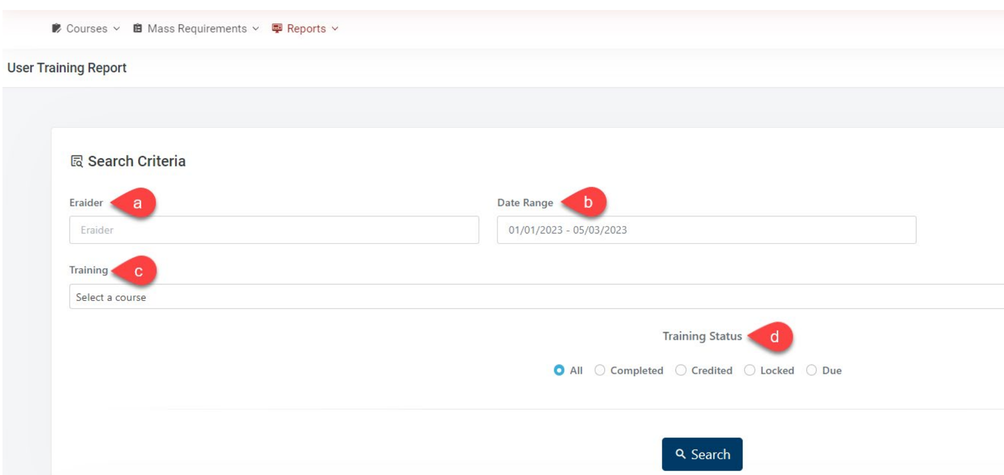
REPORTS – COMPLIANCE USER TRAININGS REPORT

The **User Training Report** will yield training completion information for all active users in Tech Training. The report includes the following fields: id, training, r number, eRaider, full name, email, termination date, start date, due date, course active, completed, credited, locked, attempts, grade, completed date, department, college, and position.

1) To pull a **User Training Report**, click on the **Reports** dropdown → **Compliance** → then click on **User Trainings Report**. You will see the following screen:

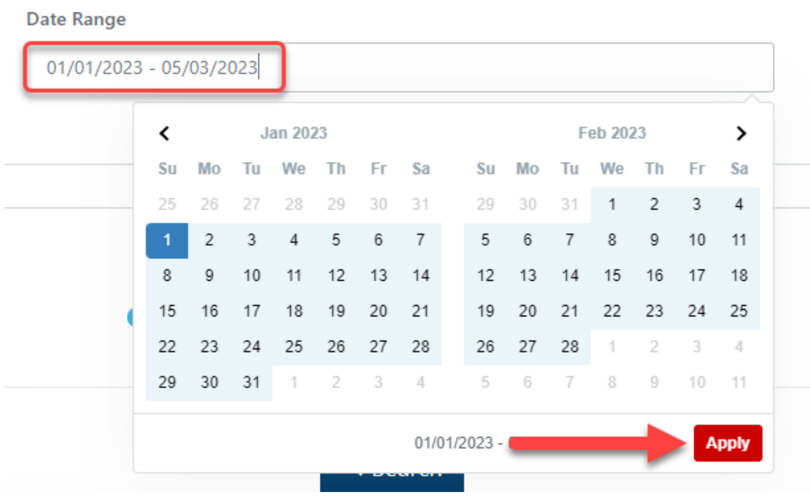


2) You will be redirected to the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

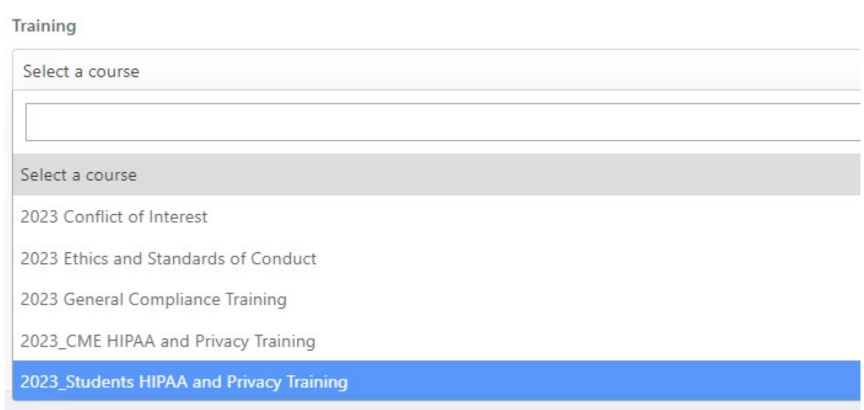


a) **eRaider** – Enter the **individual's eRaider**. If you need to pull a report for all users, leave this field blank.

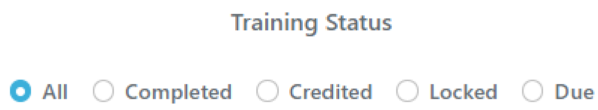
b) **Date Range** – Click on this section to select the specific **date range** you need. Once you have selected the correct dates, click on the **Apply** button.

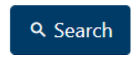


c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.

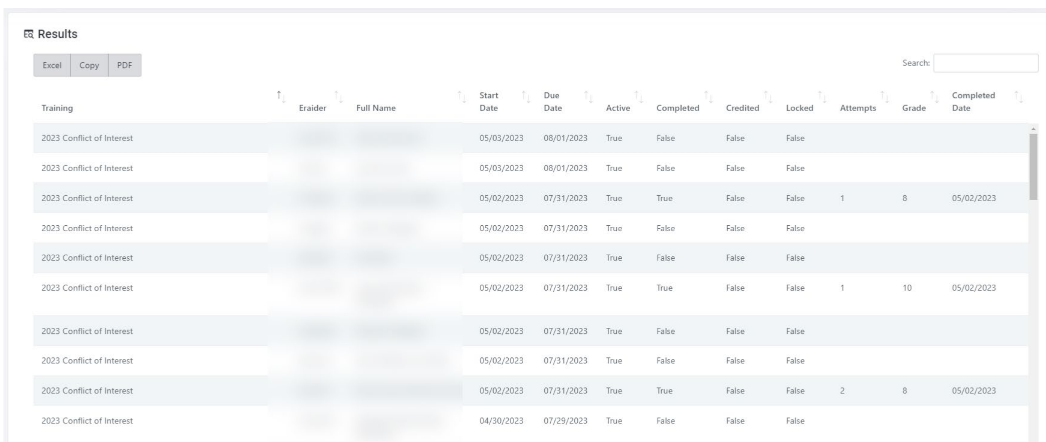


d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, click on the radio button **All**.



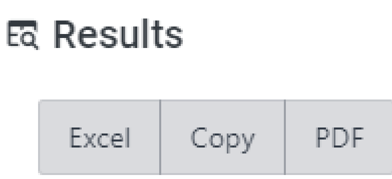
3) Once you have completed all the fields, click on the  button.

4) When you click **Search**, the report will populate in the **Results** section at the bottom of the screen.



Training	Eraider	Full Name	Start Date	Due Date	Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	8	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	10	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	2	8	05/02/2023
2023 Conflict of Interest			04/30/2023	07/29/2023	True	False	False	False			

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

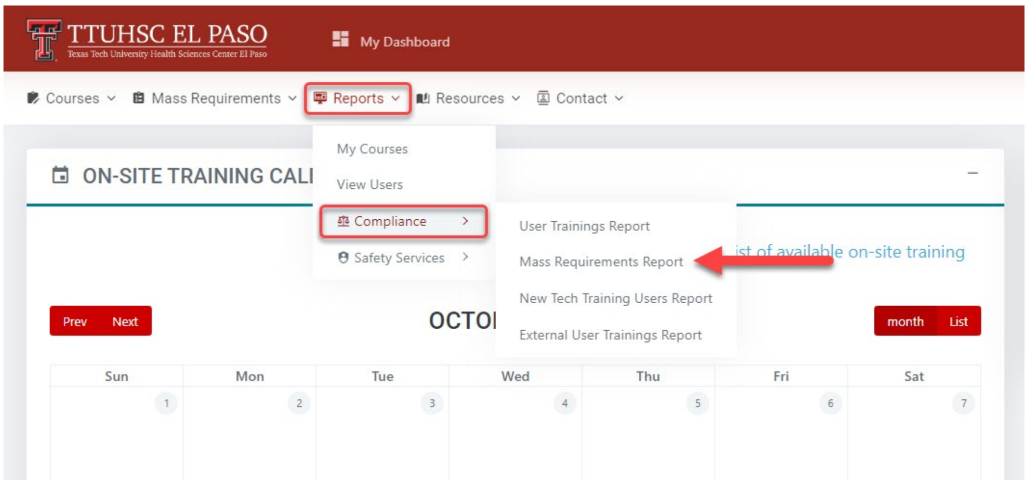


6) Once you have downloaded your report, save the **User Training Report** to your desired location.

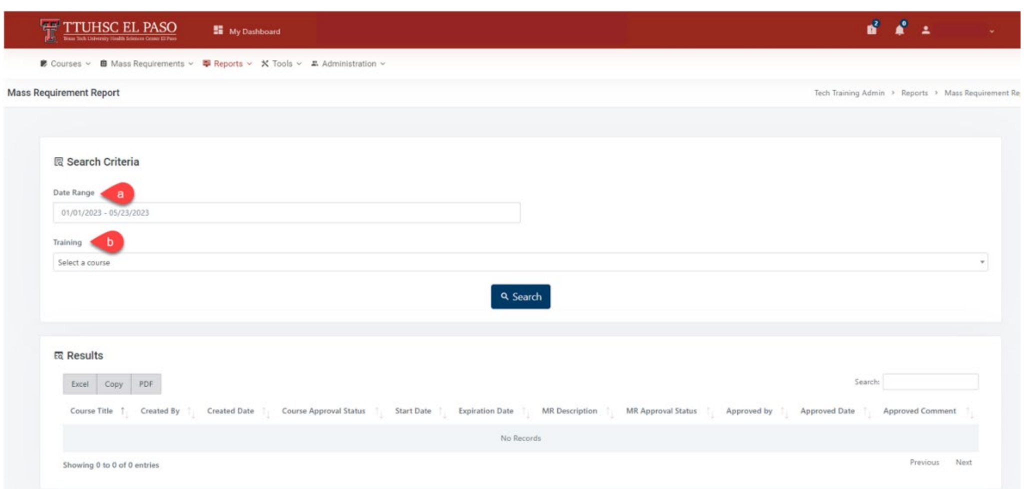
REPORTS – COMPLIANCE MASS REQUIREMENTS REPORT

The **Mass Requirements Report** will yield training course information for all course that have been uploaded into Tech Training. The report includes the following fields: course title, created by, created date, course approval status start date, expiration date, MR description, MR approval status, approved by, approved date and approved comment.

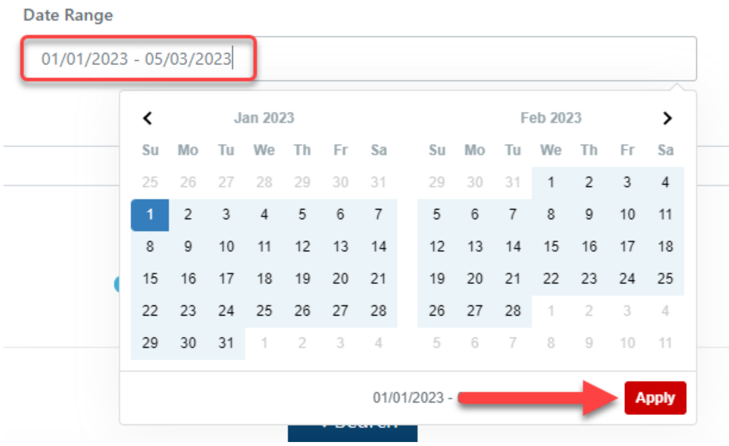
1) To pull a **Mass Requirements Report**, click on the **Reports** dropdown → **Compliance** → then click on **Mass Requirements Report**.



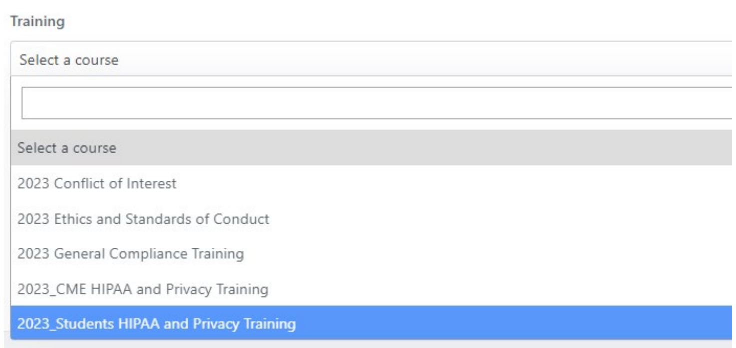
2) When you click on **Mass Requirement Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

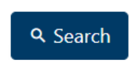


a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.



b) **Training** – you will need to select a course in the **Training** field dropdown. If you need to pull a report that shows all training courses, you may leave this field as **Select a course.**



3) Once you have completed all of the required fields, click on the  button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

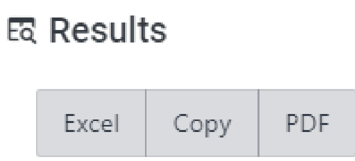
Results

Excel | Copy | PDF

Search:

Course Title	Created By	Created Date	Course Approval Status	Start Date	Expiration Date	MR Description	MR Approval Status	Approved by	Approved Date	Approved Comment
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	01/24/2024	for research and iRIS purpose	Approved		01/24/2023	Committee has already approved the training. Assigned training for individual is approved. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Denied		03/30/2023	Testing. Not approved. Look at your course information. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/31/2023	03/31/2024	This is for testing purposes.	Approved		04/13/2023	Testing approval yqc
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/13/2023	12/31/2023	COI training is required by policy 10.50, Regents' Rules chapter 3.1 and Texas Government Code 572	Approved		01/13/2023	Approve yearly course
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Approved		03/29/2023	Force Mass Requirement

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

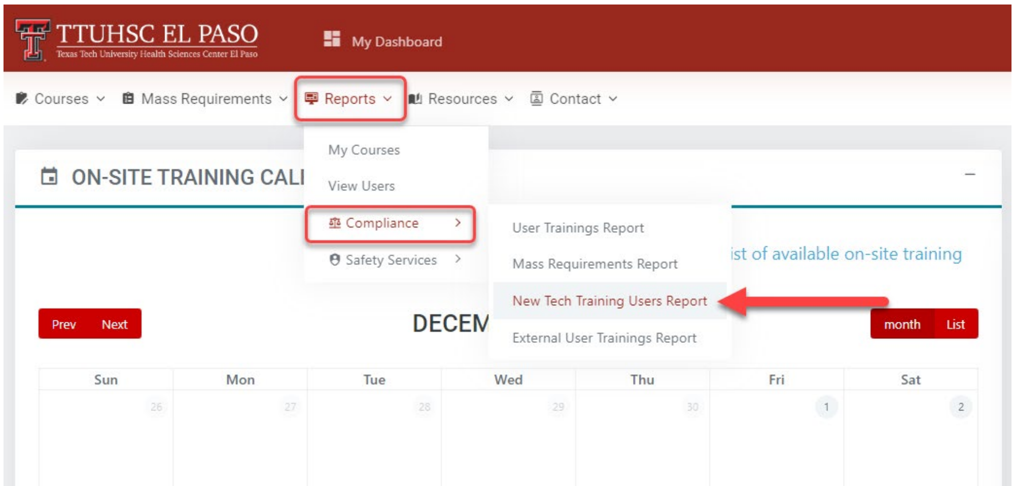


6) Once you have downloaded your report, make sure to save the **Mass Requirement Report** to your desired location.

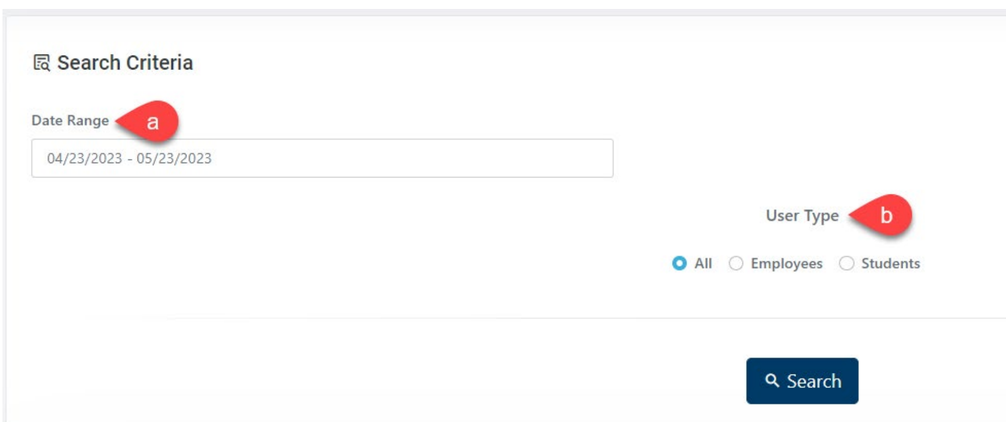
REPORTS – COMPLIANCE NEW TECH TRAINING USERS REPORT

The **New Tech Training Users Report** is utilized to verify the number of employees hired by date range.

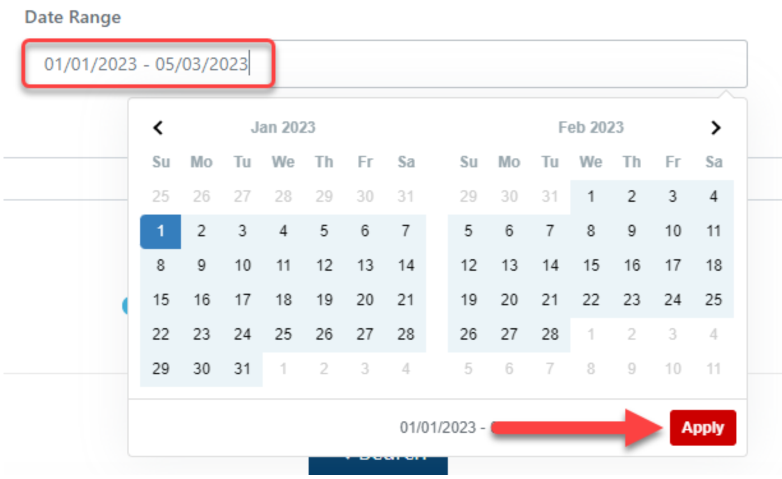
1) To pull a **New Tech Training Users Report**, click on the **Reports** dropdown → **Compliance** → then click on **New Tech Training Users Report**.



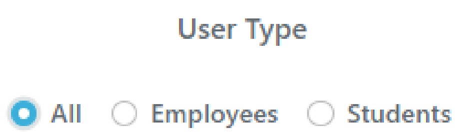
2) When you click on **New Tech Training Users Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:



a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

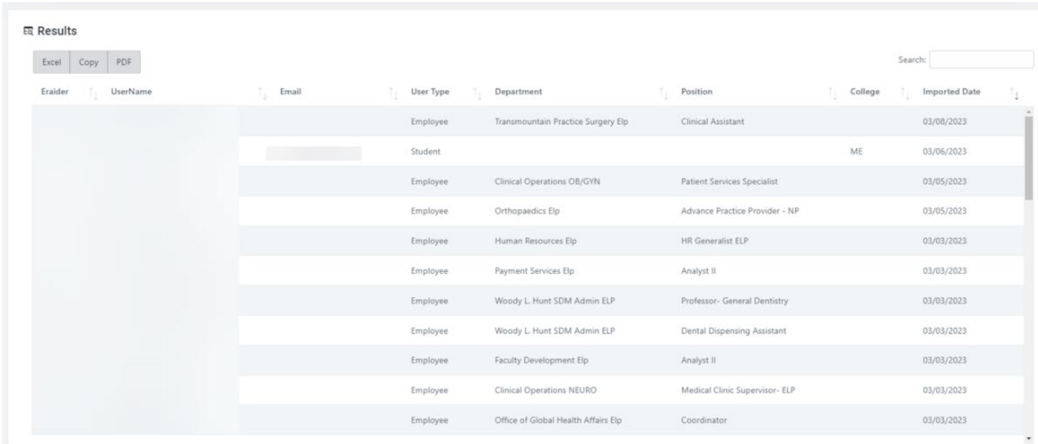


b) **User Type** – If you want to see a specific User Type, select either All, Employees or Students.



3) Once you have completed all of the required fields, click on the  button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.



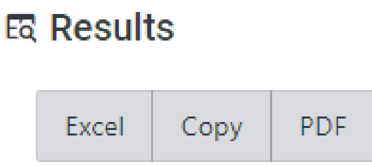
Results

Excel Copy PDF

Search:

Eraider	UserName	Email	User Type	Department	Position	College	Imported Date
			Employee	Transmountain Practice Surgery Elp	Clinical Assistant		03/08/2023
			Student			ME	03/06/2023
			Employee	Clinical Operations OB/GYN	Patient Services Specialist		03/05/2023
			Employee	Orthopaedics Elp	Advance Practice Provider - NP		03/05/2023
			Employee	Human Resources Elp	HR Generalist ELP		03/03/2023
			Employee	Payment Services Elp	Analyst II		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Professor- General Dentistry		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Dental Dispensing Assistant		03/03/2023
			Employee	Faculty Development Elp	Analyst II		03/03/2023
			Employee	Clinical Operations NEURO	Medical Clinic Supervisor- ELP		03/03/2023
			Employee	Office of Global Health Affairs Elp	Coordinator		03/03/2023

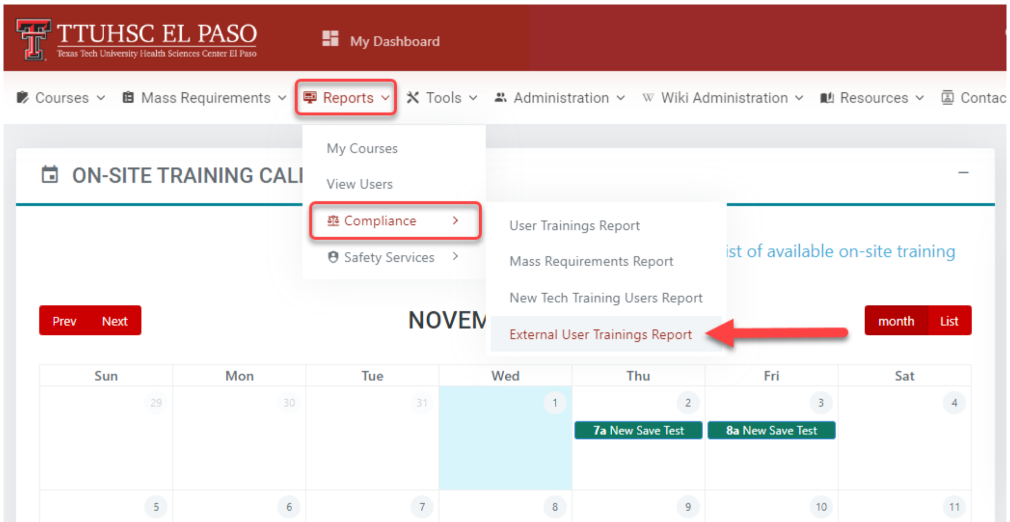
5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.



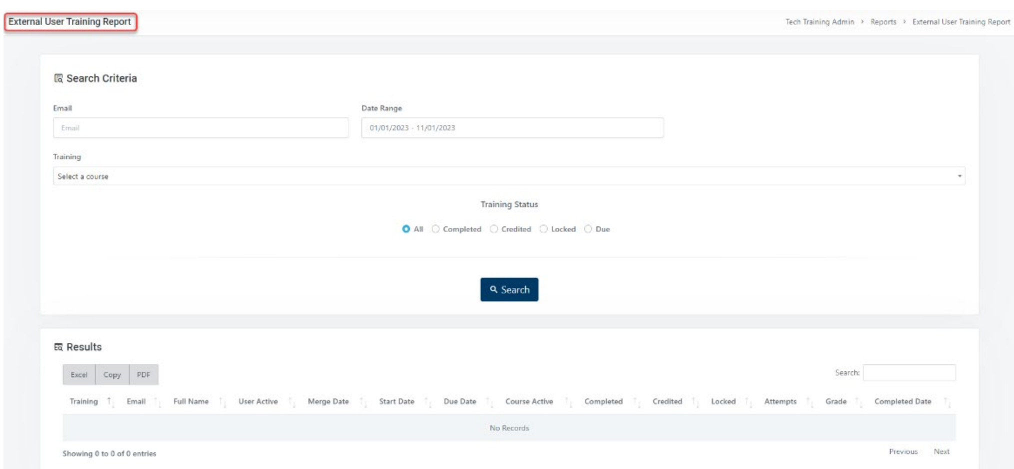
REPORTS – COMPLIANCE EXTERNAL USER TRAININGS REPORT

The External User Trainings Report will show the user the training information for the External Users.

1) To download the External Users Training Report, go to the **Reports** tab at the top of the page > **Compliance** and click on **External User Trainings Report.**



2) This will take you to the **External User Training Report** page.



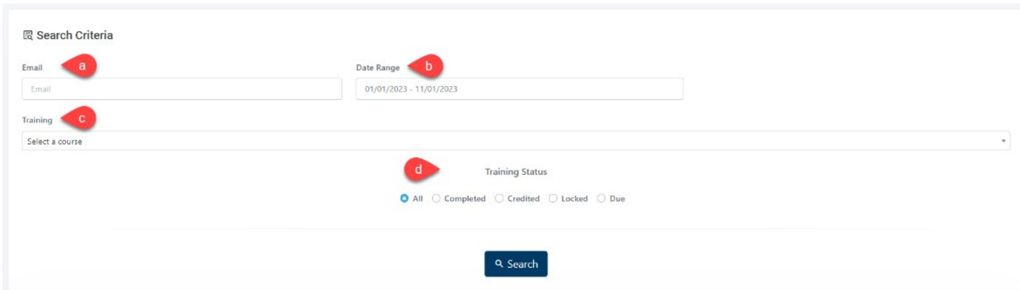
3) In the **Search Criteria** section, fill out the following fields:

   a) **Email** – Enter the **individual's personal email**. If you need to pull a report for all users, leave this field blank.

   b) **Date Range** – Select the desired date range.

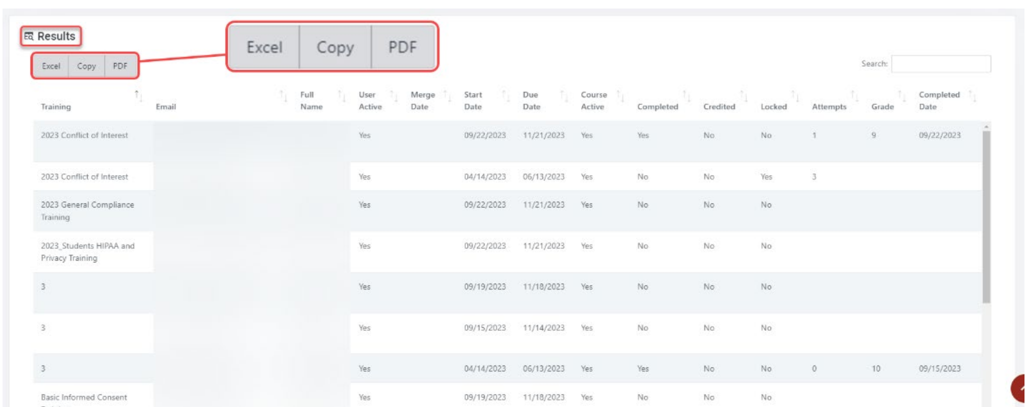
c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course.**

d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.



4) After you have filled out all the fields, click on the Search button.

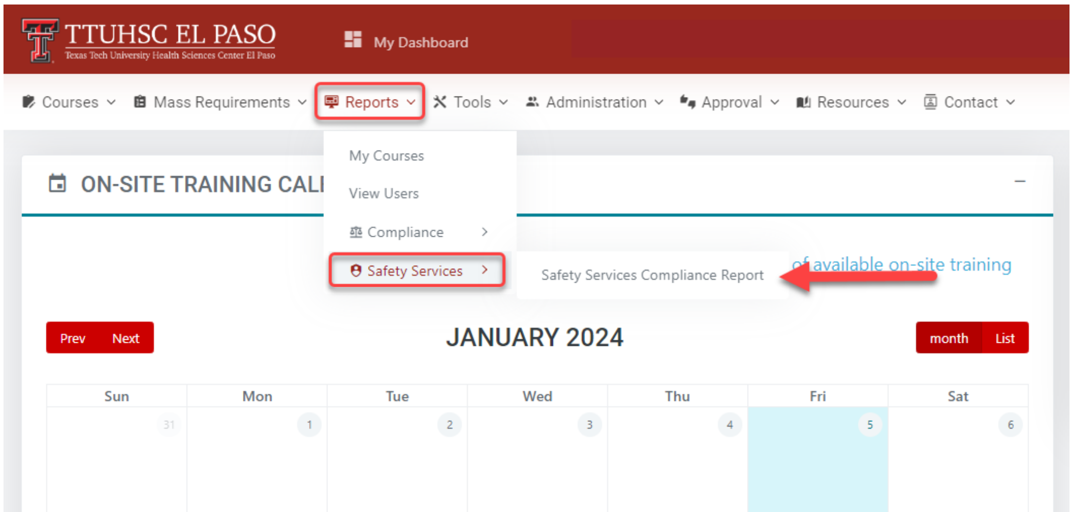
5) The **Results** section will populate with all the External User Trainings information. Click on the **Excel**, **PDF** or **Copy** option to download or save the report.



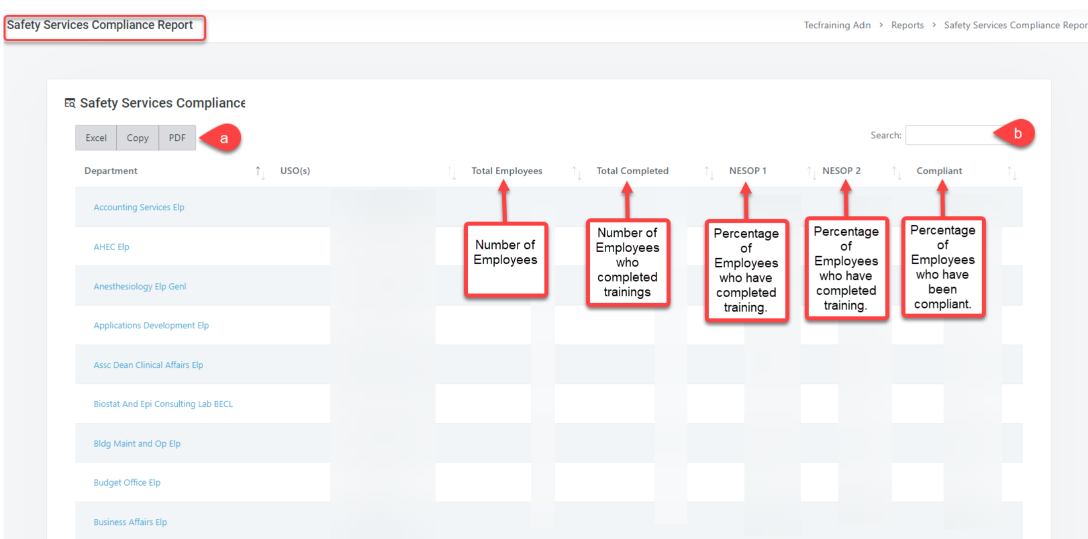
REPORTS – SAFETY SERVICES COMPLIANCE REPORT

For more information on Safety Services content, please contact the Safety Services Department at safetyserviceselp@ttuhsc.edu or call 915-215-4823.

1) Go to the **Reports dropdown,** click **Safety Services** and go to **Safety Services Compliance Report.**



2) Next, you will see the **Safety Services Compliance Report** screen.



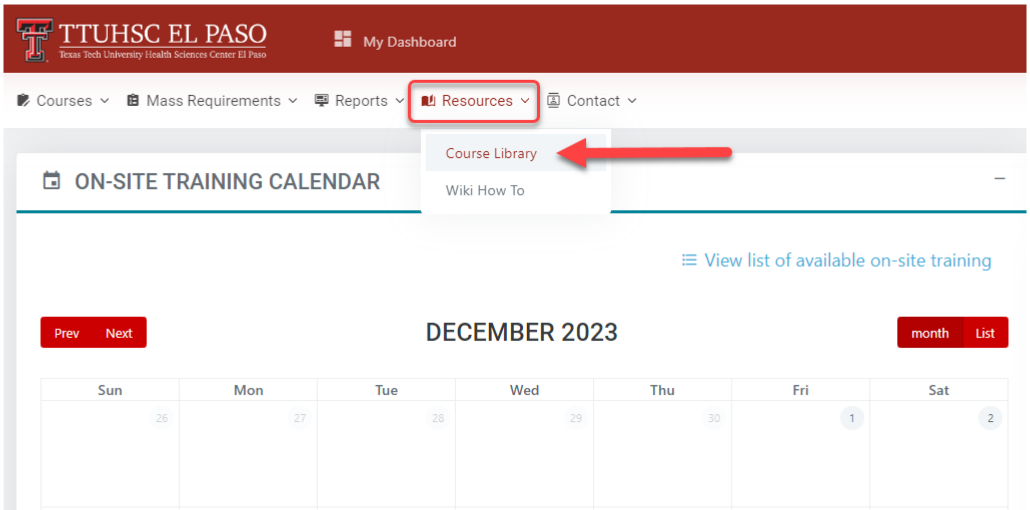
a) In this section, you will have the option to export the document into **Excel** or **PDF** or **Copy** the document.

b) You have the **Search** bar where you can look up a department by its name.

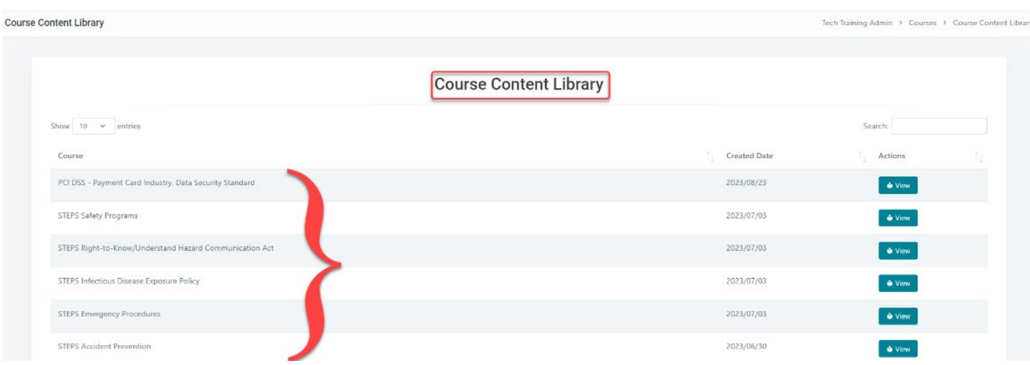
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

4) To go to the **Couse Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



5) This will take you to the **Course Content Library** screen. In this page, you will able to see all the trainings that have been uploaded.



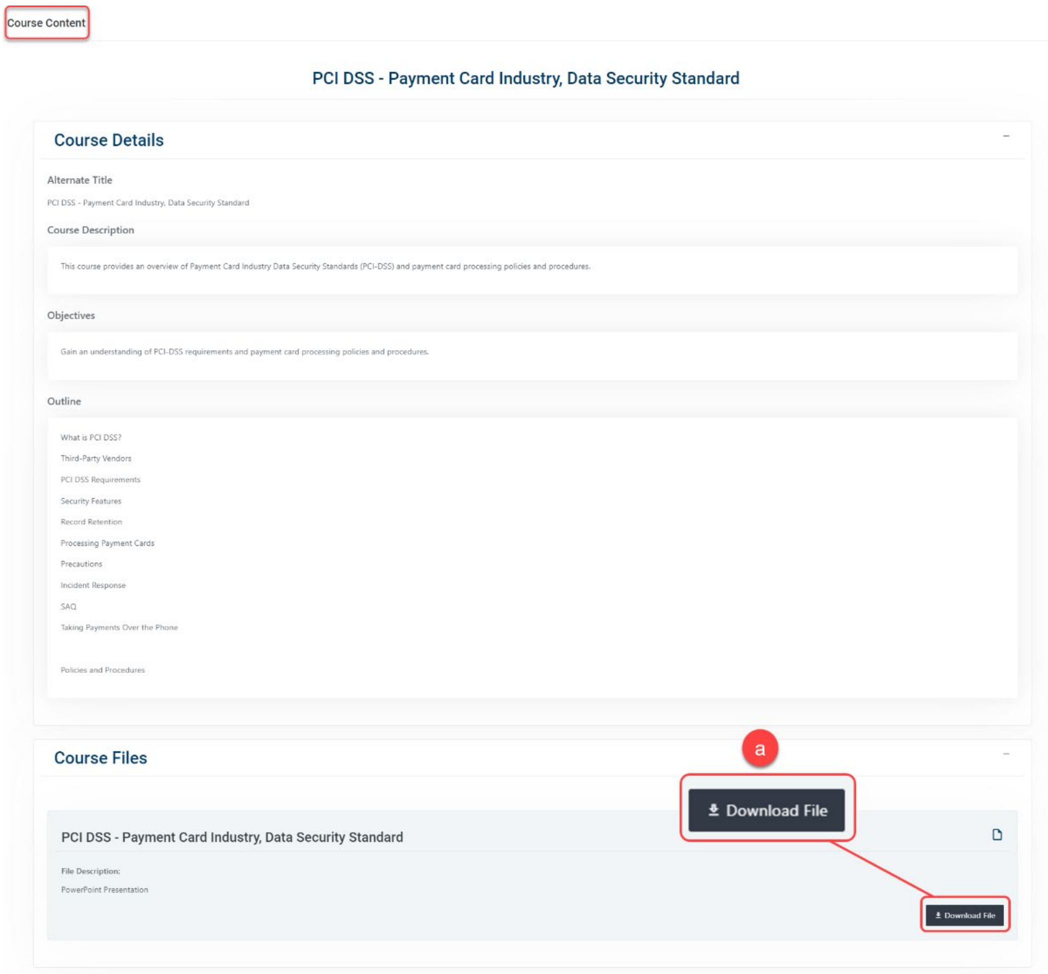
b) Click on the 

button to view the content for your desired training(s).

6) Next, you will see the **Course Content** page which allows you to see the details for that training.

b) You can also download the **Course Files** for that course.

Back to Top

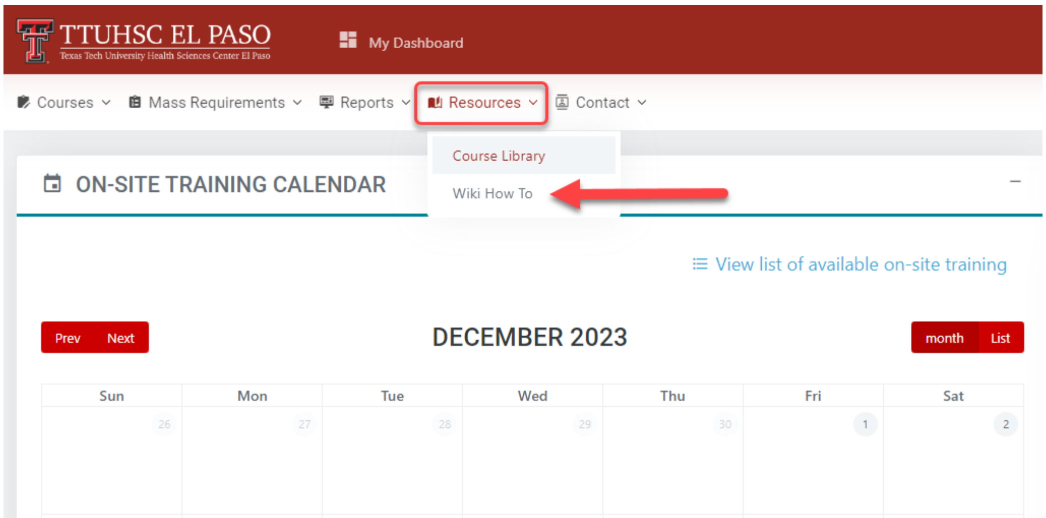

Course Content
PCI DSS - Payment Card Industry, Data Security Standard
Course Details
Alternate Title
PCI DSS - Payment Card Industry, Data Security Standard
Course Description
This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.
Objectives
Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.
Outline
What is PCI DSS?
Third-Party Vendors
PCI DSS Requirements
Security Features
Record Retention
Processing Payment Cards
Precautions
Incident Response
SAQ
Taking Payments Over the Phone
Policies and Procedures
Course Files
a
Download File
PCI DSS - Payment Card Industry, Data Security Standard
File Description:
PowerPoint Presentation
Download File

RESOURCES – WIKI HOW TO

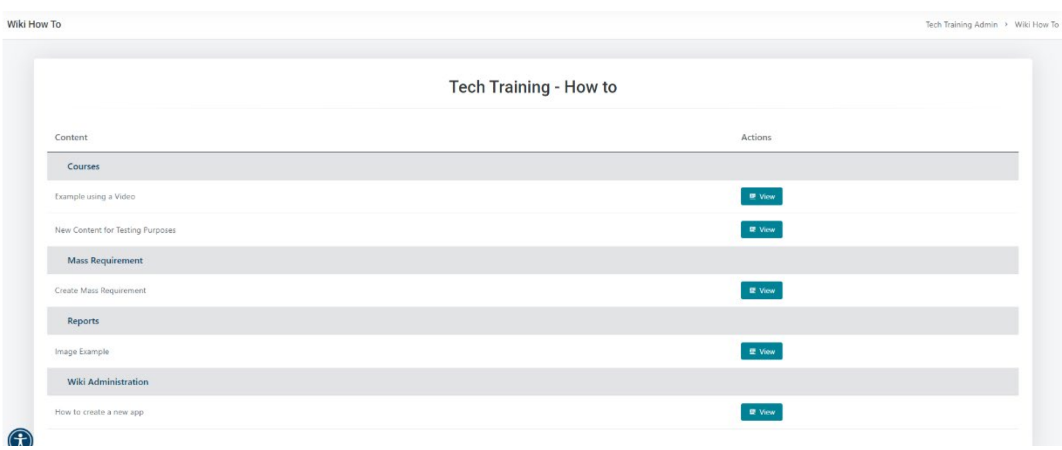
This feature will allow the user to see instructional videos, images or documents on different functions within the Tech Training application.

Note: Functions available vary depending on the user's role.

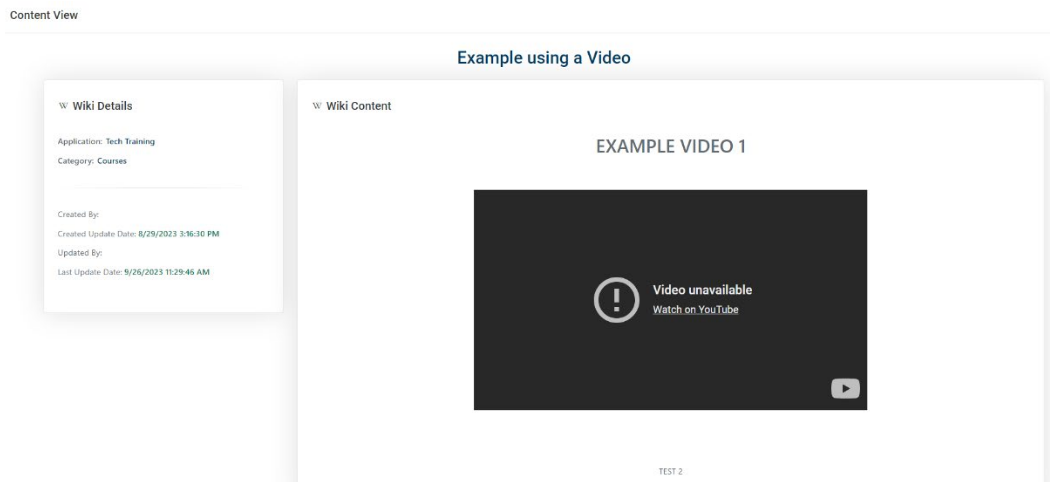
1) Go to the **Resources** dropdown at the top of the page and click on **Wiki How To**.



2) This will take you to the **Wiki How To** page. In the **Tech Training – How to** section you can see the instructional videos, documents, and images on various topics.



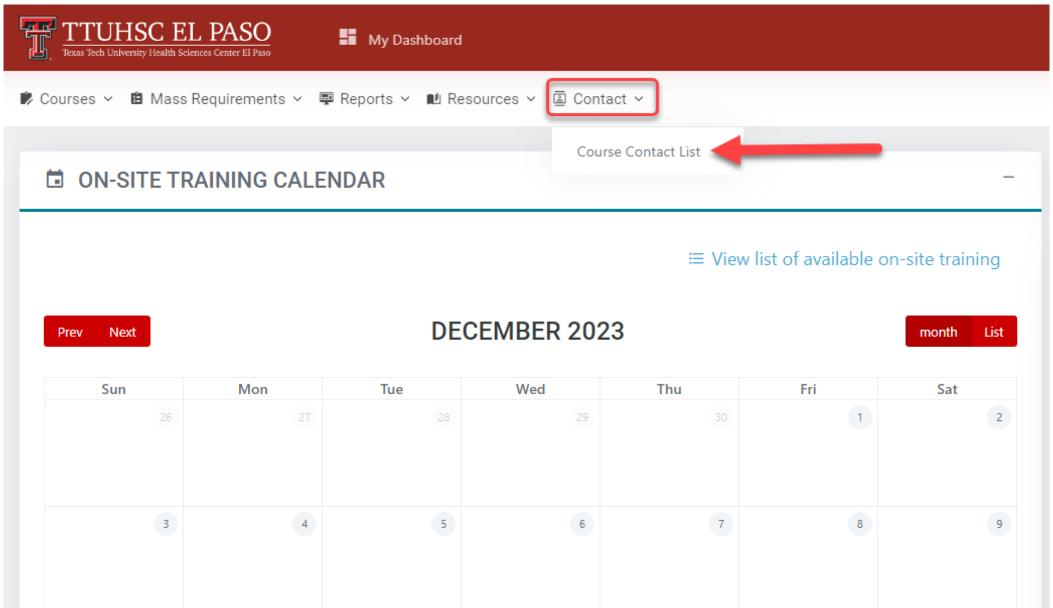
3) To see a specific section, click on the **View** button next to the name of the desired topic. This will display the content for that section.



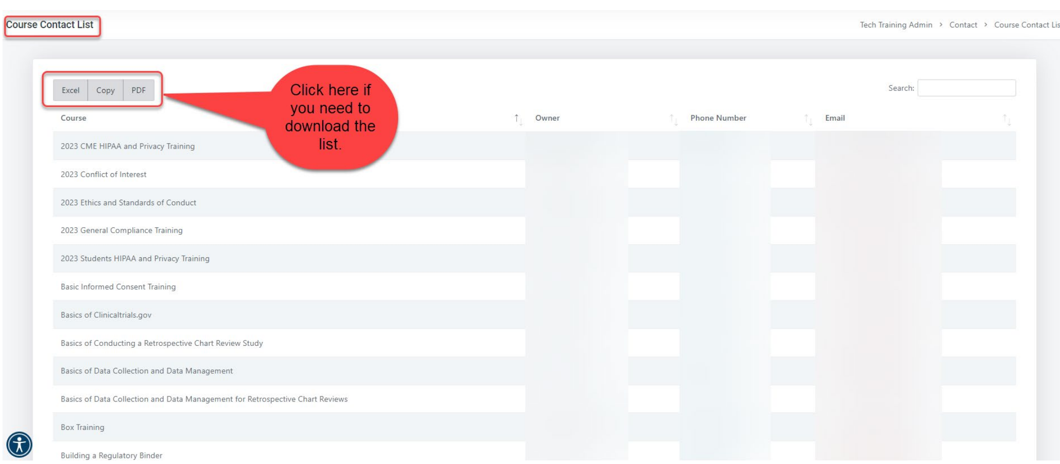
CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

3) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.

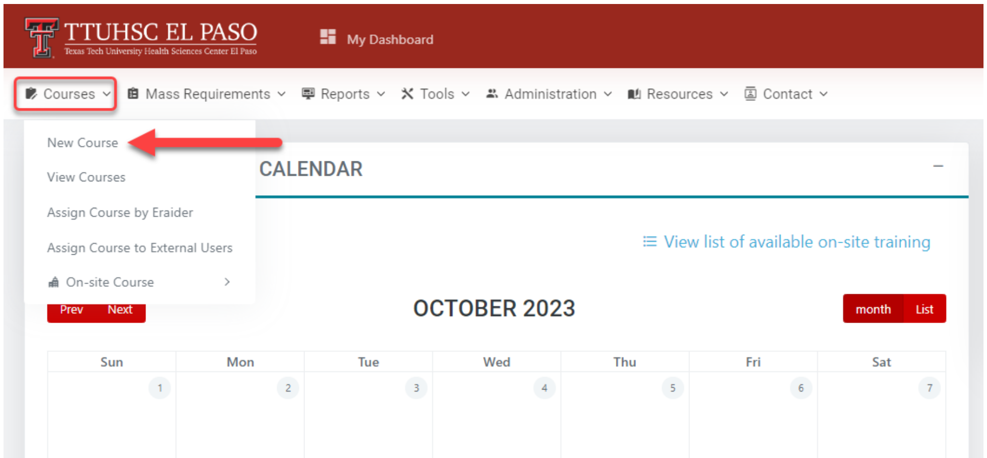


4) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number and email.



COURSES – NEW COURSE

1) To create a course, go to the **Courses** dropdown from the left-hand corner and click on **New Course**.



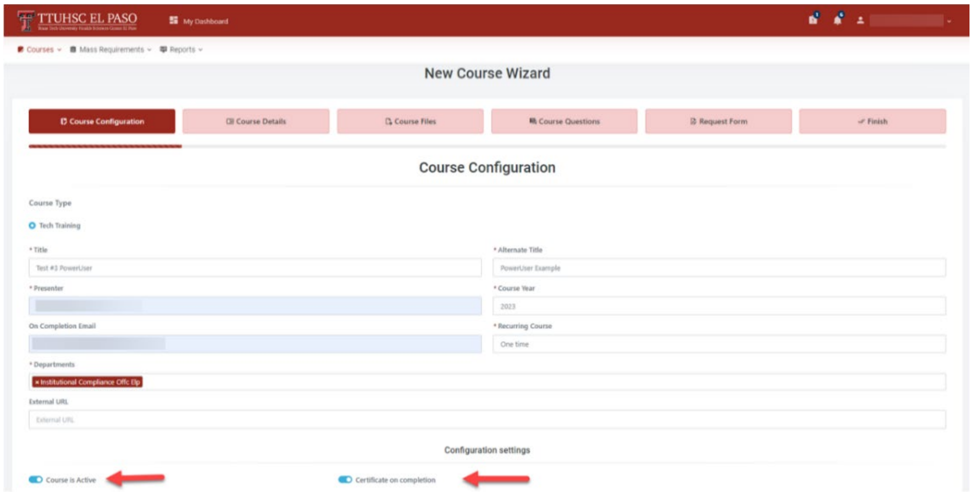
2) You will be directed to the **New Course Wizard** screen. First step is the **Course Configuration** tab.

   a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

      - Under **Departments**, you can choose all departments or choose a specific department.

      - For **External URL**, use this only if course will have an external source attached. (For example, utilizing YouTube videos or external sites outside of TTUHSC EP website.)

   b) Assure the **Course is Active** and **Certificate on Completion** toggle buttons under **Configuration settings** are blue. This will make them active.



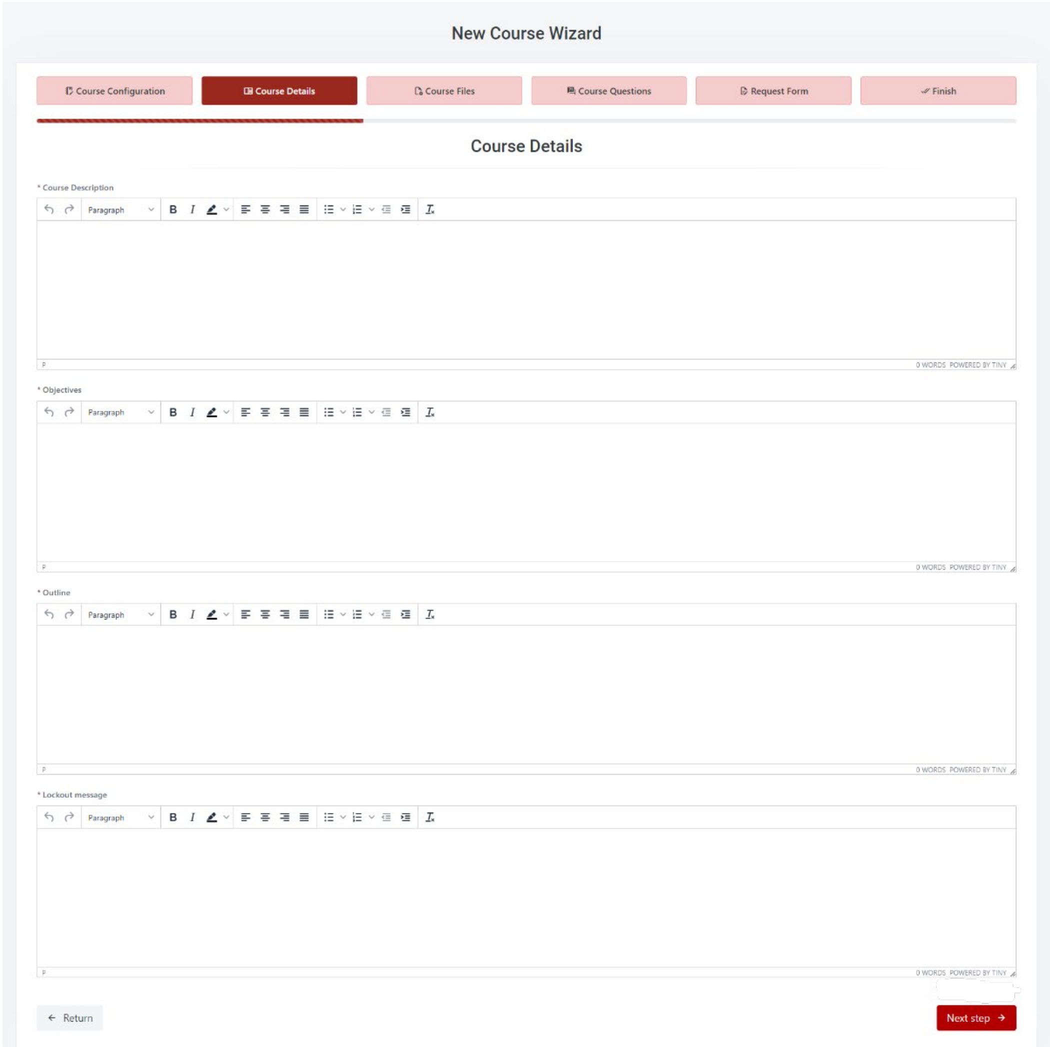
c) Once the information is completed, click on the **Next step →** button to proceed.

3) You will be directed to the next tab, **Course Details**. See below:

a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

b) Then click on the **Next step →** button to proceed.

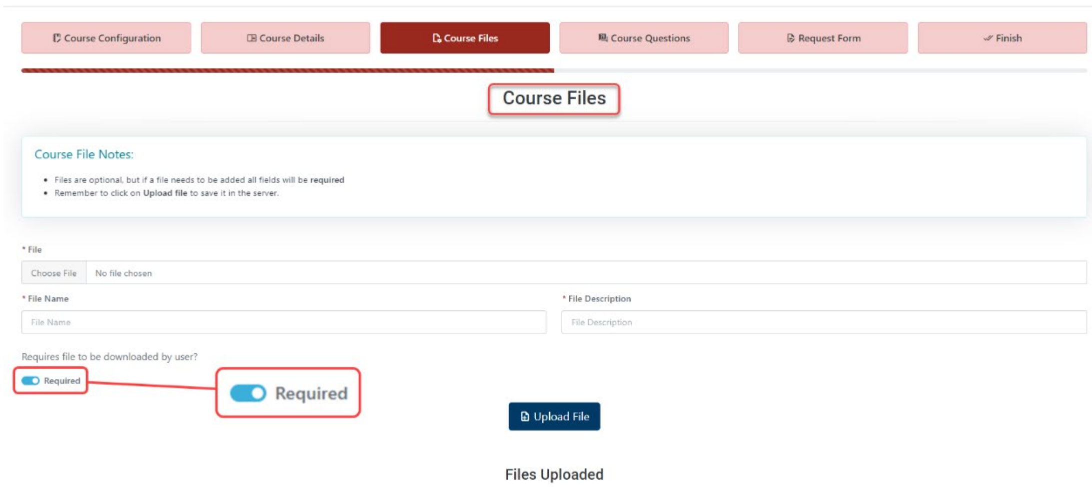
- **Course Description** – enter a short description of the course.
- **Objectives** – outline the goals for the user upon the completion of this course.
- **Outline** – enter a general description of the course content and instructions.
- **Lockout Message** – enter contact information of person that can unlock the training for user.



4) Under **Course Files** tab, you will be able to upload the desired files. There is no limit to the number of files you wish to upload.

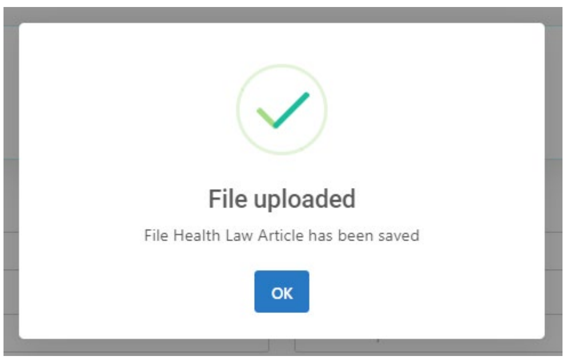
   a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

   b) Ensure the **Required** toggle button at the bottom left hand corner of the page is blue. This will make downloading the course files a requirement.



5) Once the files have been uploaded, click **Upload Files**.

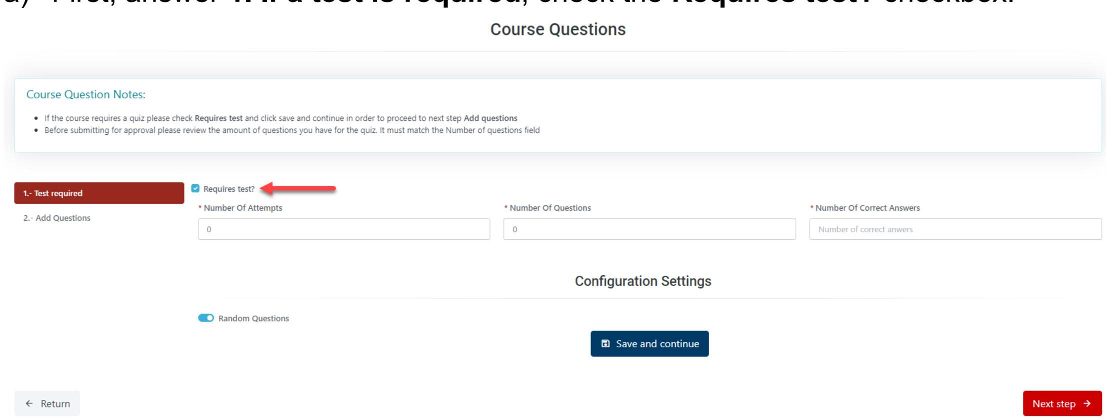
   a) A pop-up box will appear. Click **Ok.**



6) You may continue uploading additional files. If you are finished, click on  to proceed.

7) You will be directed to **Course Questions** tab. This is a two-step process.

   a) First, answer **1. If a test is required**, check the **Requires test?** checkbox.



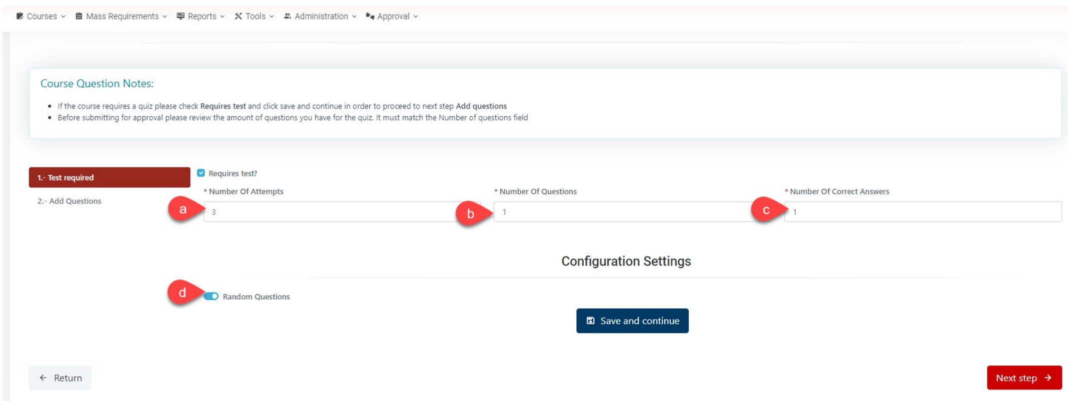
8) Next, you will need to fill in the following fields:

a) **Number of Attempts** – this field determines how many times the user is allowed to take the test before being locked out.

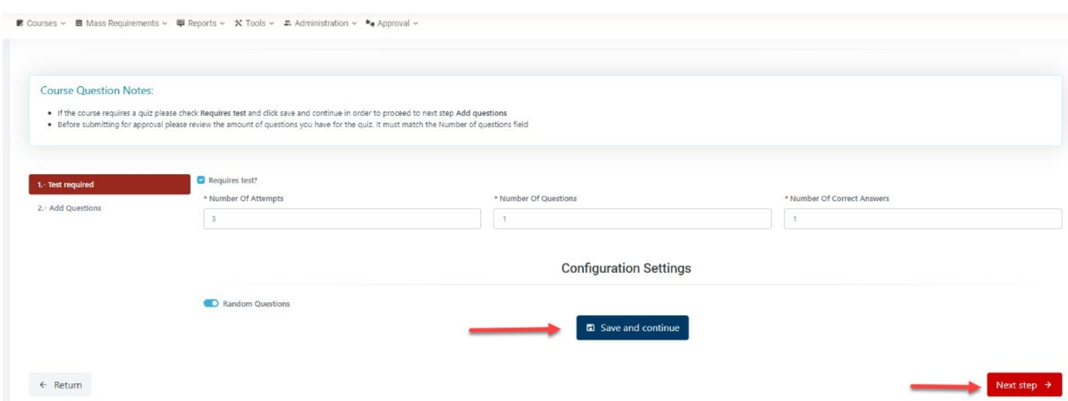
b) **Number of Questions** – this field will determine how many questions the user will receive each time the test is taken.

c) **Number of Correct Answers** – this field will determine the number of questions that must be answered correctly to pass the test.

d) You will have the option to choose **Random Questions**. It is recommended that you select **Random Questions** so that the user receives a new shuffled set of questions when retaking a test. If you don't choose **Random Questions**, the questions will appear in the same order each time the user initiates the test.

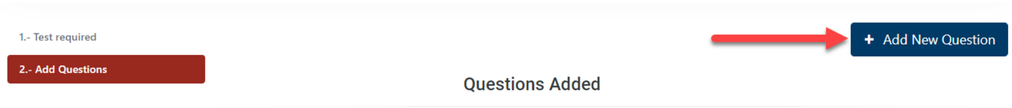


9) When the information has been entered in Step 1, click on **Save and continue** button at the bottom of the screen. Then click on Next step →.



10) Next, you will be directed to the **2.-Add Questions** step.

a) Click on **Add New Question** button to start adding questions.



11) This will take you to the section below. Fill out the 

fields.

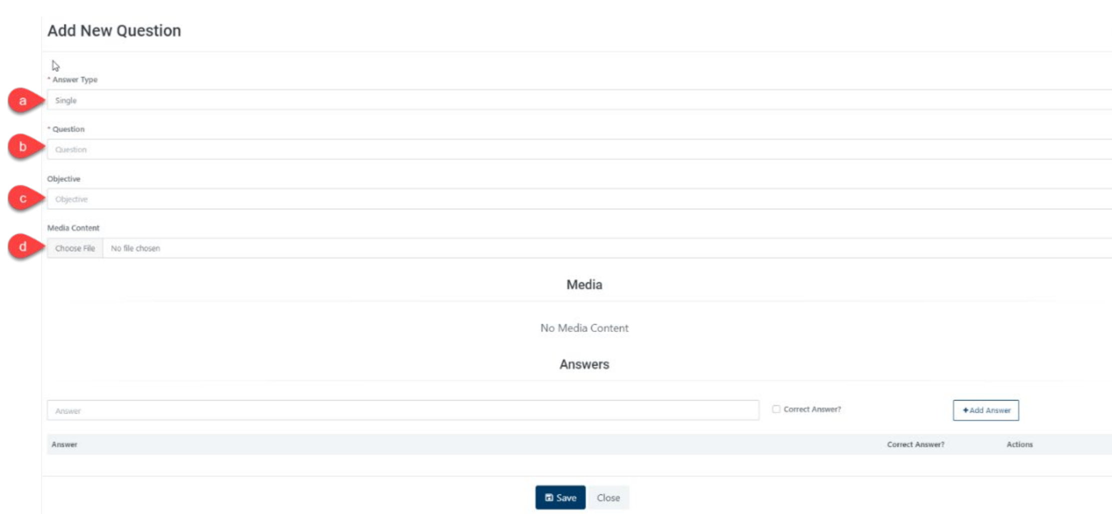
a) **Answer Type** – There are two types of answers: single or multiple. Choose **single** if question only has one correct answer. Choose **multiple** if question has more than one correct answer.

b) **Question** – The questions can be typed in, or you can cut and paste the questions from a word document. **DO NOT start a question with a number or a letter if you chose the Random Questions.**

- **Example: 1. Who is the President? or a. Who is the President?**

c) **Objective** – This section may be left blank or you may add an objective. This is not a required field.

d) **Media Content** – This section may be left blank if external URLs are not needed.

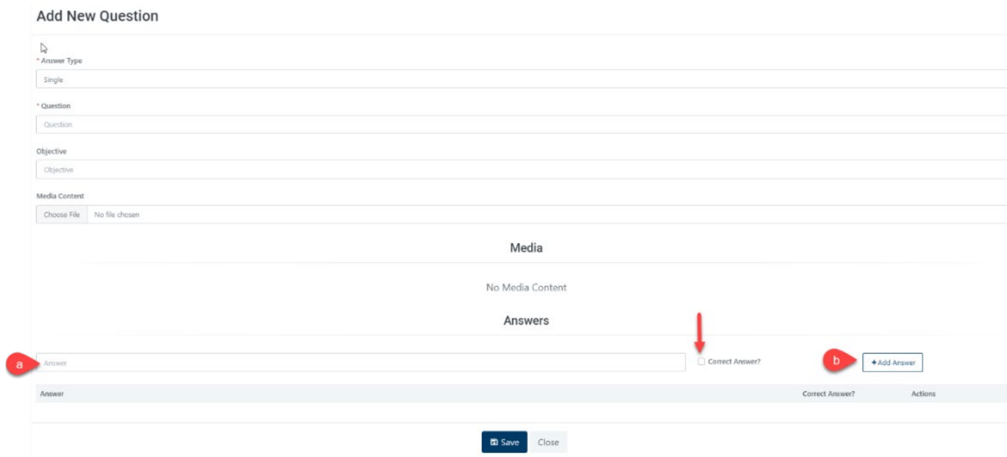


12) Next, go to the **Answer** section:

a) Type the first possible answer in the **Answer** field (you can also cut and paste the answers from a word document). If this is the correct answer, make sure to click on the **Correct Answer** check box.

b) If it is not the correct answer, click on the **+Add Answer box** to continue adding possible answers. **DO NOT start an answer with a number or a letter.**

- Example: 1. True or a. True



13) Once you have entered all of the corresponding options for the questions, click on the 

button at the bottom of your screen.

14) When you have successfully added the questions and answers and clicked on the 

button, the following pop-up notification will appear:

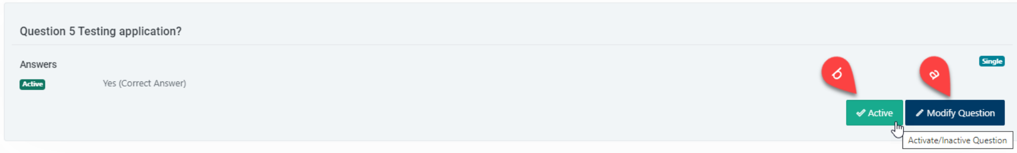
*Note: You will start seeing the questions you added under the **Questions Added** section.*

15) **Repeat steps 10 - 14 to continue adding questions.**

16) Verify that everything is correct before proceeding to the next step.

a) If you need to make changes, click on **Modify Question**.

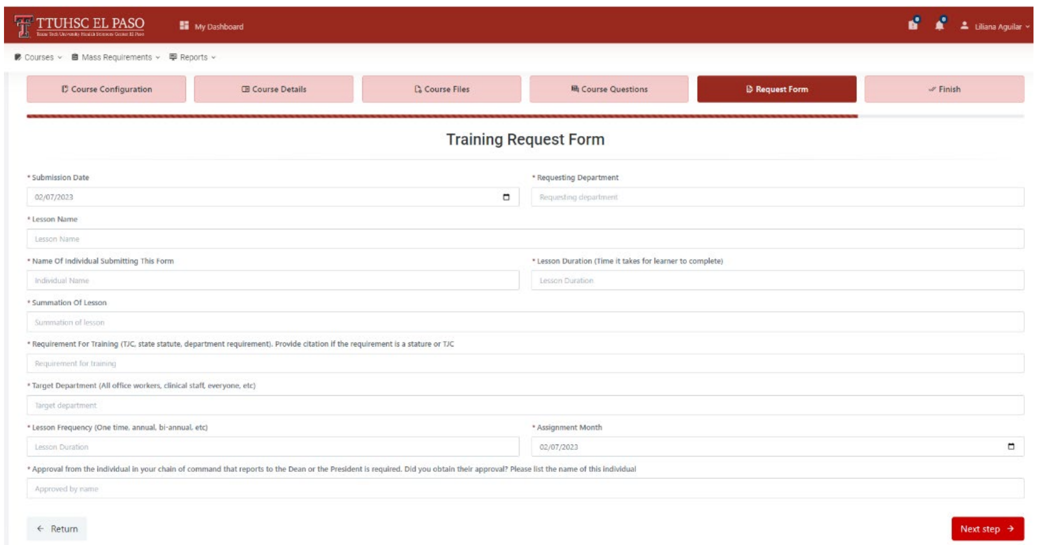
b) You can **Activate/Inactivate** a question. For example, inactivate a question that was submitted in error or was a duplicate entry.



17) Once everything is correct, click on 

at the bottom of the page.

18) Next, you will be directed to the **Request Form** tab. This is the **Training Request Form** screen. All fields need to be filled in.



- **Submission Date** – Enter date when training is submitted.
- **Requesting Department** – Enter department that owns the training.
- **Lesson Name** – Enter full name of the course.
- **Name of Individual Submitting This Form** – Enter your full name and title.
- **Lesson Duration** – Enter the time it takes for user to complete the training.
- **Summation of Lesson** – Enter brief summary of training.
- **Requirement for Training** – (TJC, state statute, department requirement). Provide Citation if the requirement is statute or TJC.
- **Target Department** – Enter all office workers, clinical staff, everyone, etc.

- **Lesson Frequency** – Determine if training will be assigned one time, annually, bi-annually, etc.

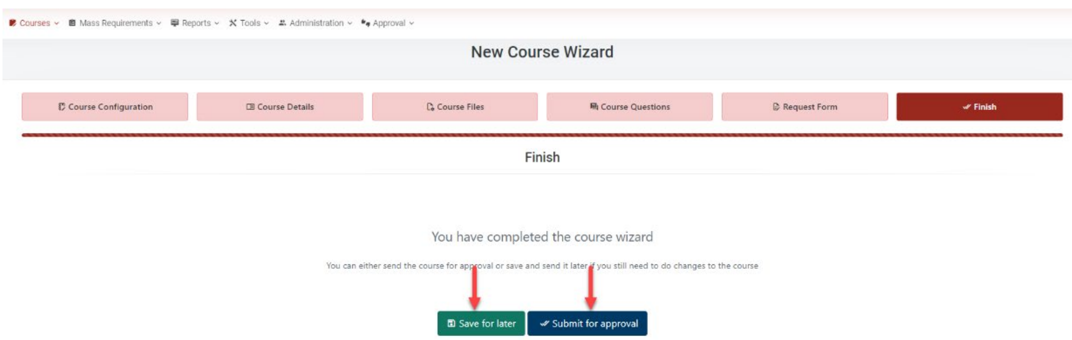
- **Assignment Month** – Enter the date the course is going to be assigned to users.

- **Approval from the individual in your chain of command** that reports to the Dean of the President is required. Did you obtain their approval? Please list the name of this individual.

19) Once this form is completed, click on Next step → at the bottom of the page.

20) The final step in the **New Course Wizard** is the **Finish** tab.

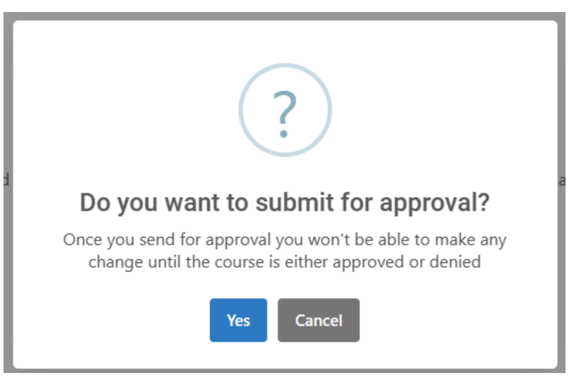
a) In the **Finish** tab, you will have one of two options: **Save for later** or **Submit for approval.**



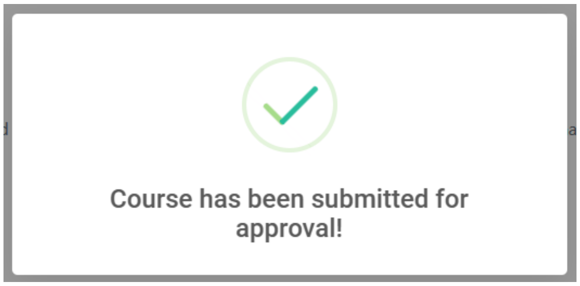
21) When you click the Submit for approval option, you will see the following pop-up box:

a) If you are ready to submit the course, click **Yes** to submit for approval.

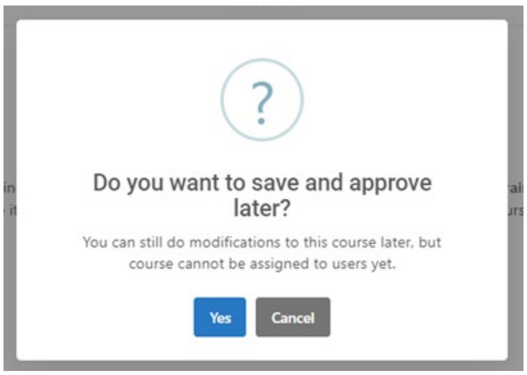
*Note: If you need to back to the **Finish** tab, click **Cancel**.*



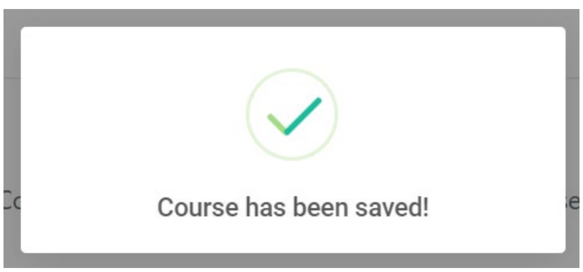
b) Once you click **Yes**, you will see the pop-up screen below confirming the course has been submitted for approval:



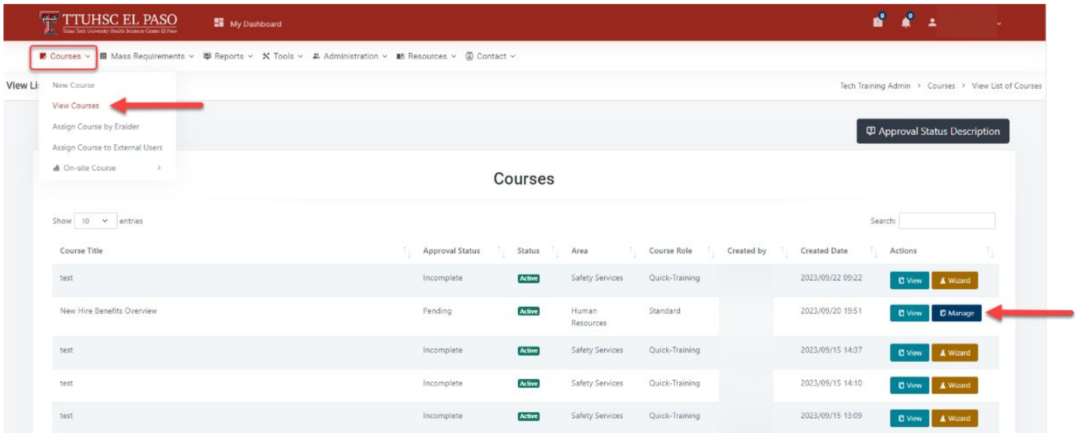
22) If you click on the **Save for later** option, you will see the pop-up box below. Click **Yes** to confirm. *Note: To go back to the Finish tab, click* ***Cancel****.*



a) When you click **Yes**, you will see the following pop-up box stating the training has been saved:



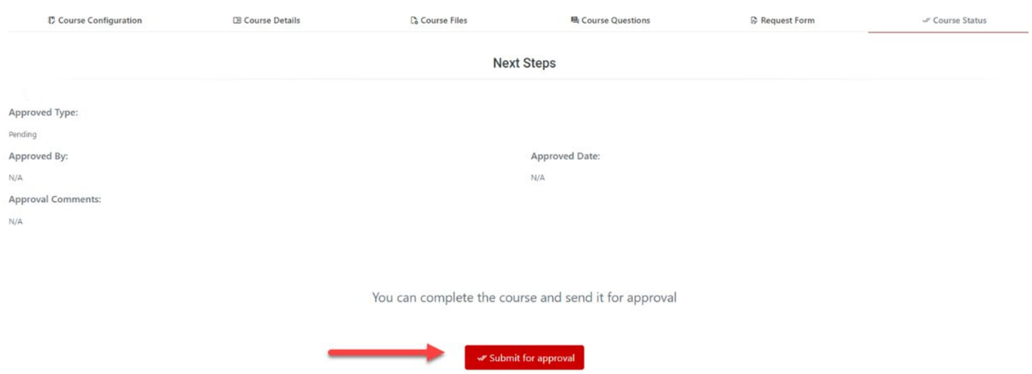
23) If you need to go back to a course that has been saved, click on the **Courses→ View Courses** section to locate the training. The status under the **Actions** column will change to **Manage**. Click on the **Manage** button to open the training.



24) You will be directed to the **Course Configuration** screen. From here, you can click on any one of the tabs to **modify/update** the information.

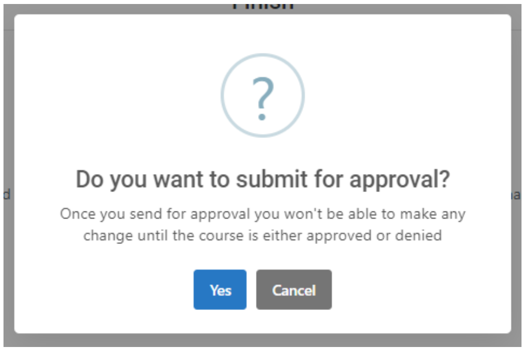
- If you **modify/update** information in one of the tabs, make sure to click on the **Save** button at the bottom of the page.

25) Once you have **modified/updated** the information, go to the **Course Status** tab and click on **Submit for Approval**.



26) When you click on **Submit for Approval**, you will see the pop-up screen below. You may choose to submit the course by selecting **Yes,** or choose **Cancel** to go back to the **New Course Wizard** screen.

27) If you choose **Yes**, you will get another pop-up box indicating the course has been submitted.

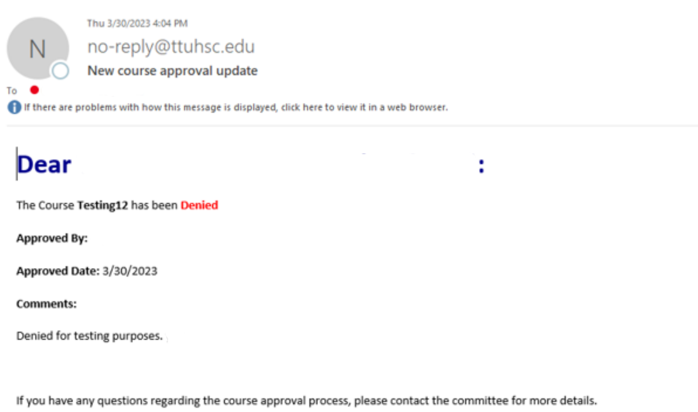


28) Once a course has been **submitted for approval**, an automated email will be sent to the Committee members.

29) When the course has been **approved/denied** by a Committee member, you will receive an automated notification via email.

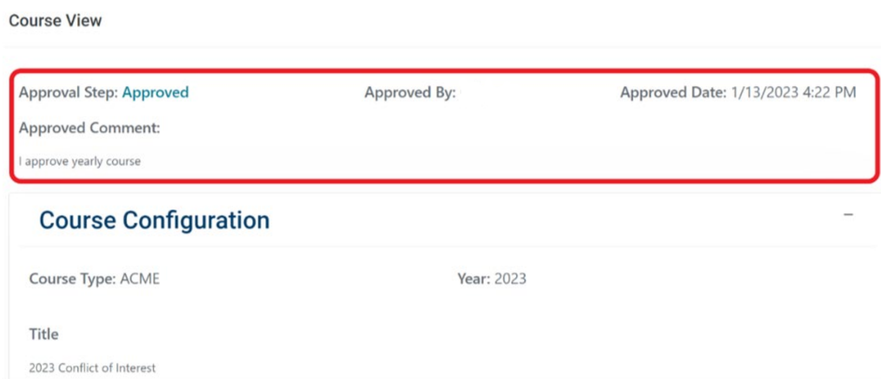
- Example for when course has been approved:

- Example for when course has been denied:

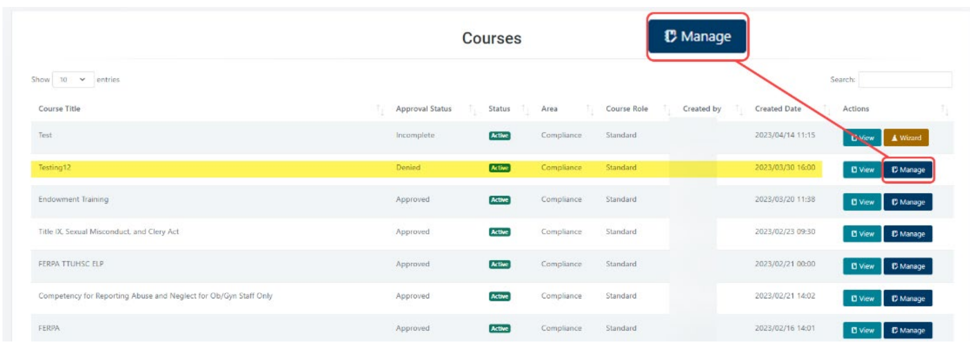


30) If the course is **denied** and changes need to be made, go to the **Courses** tab at the top-left side of the page. Click on the **View Courses** section, look for the course and click on the **View** button.

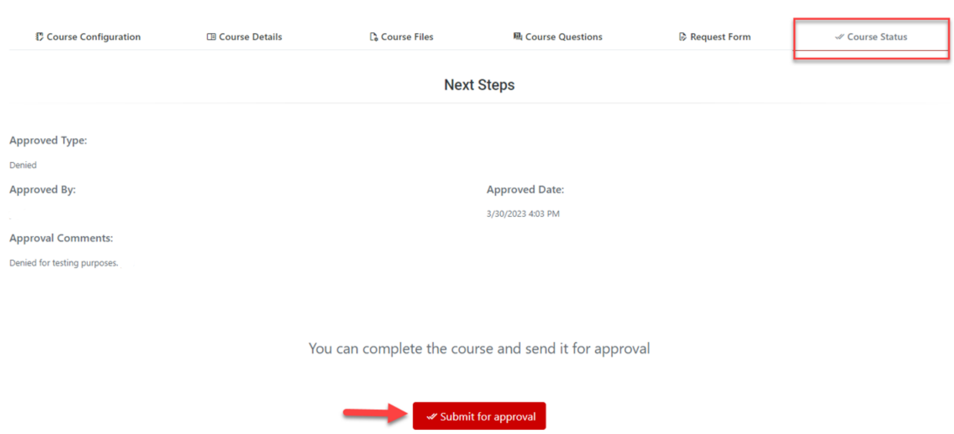
a) In the **Course View** section, you can see the status of the course. If denied, Committee members will indicate the reason for denial under the **Approved Comment** section.



31) If changes need to be made, you can go to the **Manage** button on the right.



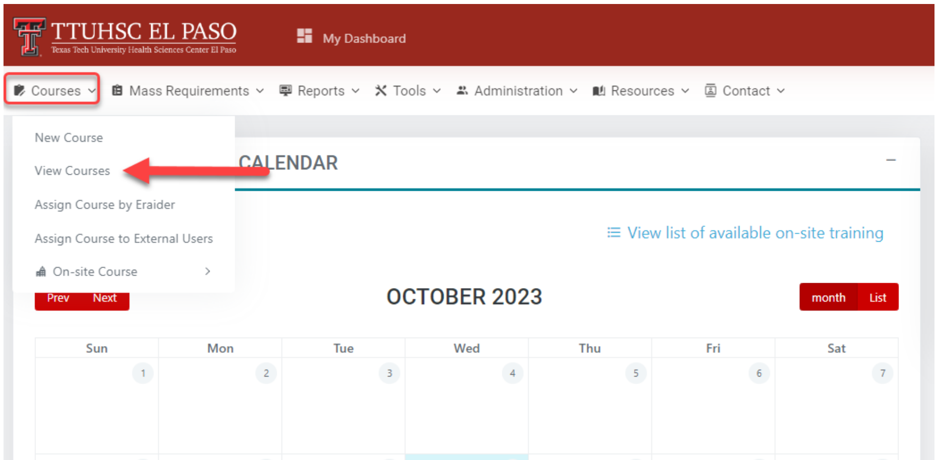
32) Once you made all necessary edits, you may go to the **Course Status** tab and resubmit the course for approval. (The course will be rerouted to the Committee for approval.)



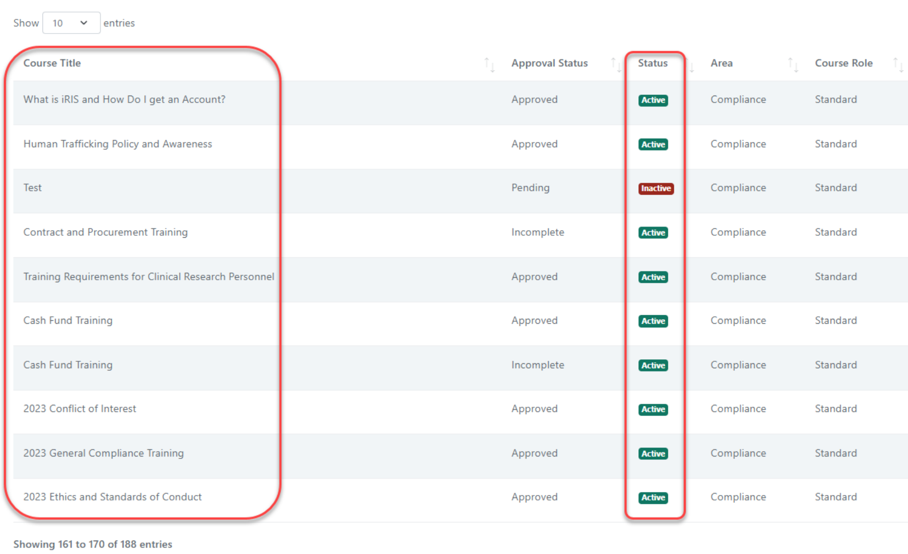
Note: The training owner will need to resubmit the course each year for Committee approval.

COURSES – VIEW COURSES

1) To review courses, click on the **Courses** dropdown menu then click on **View Courses**.



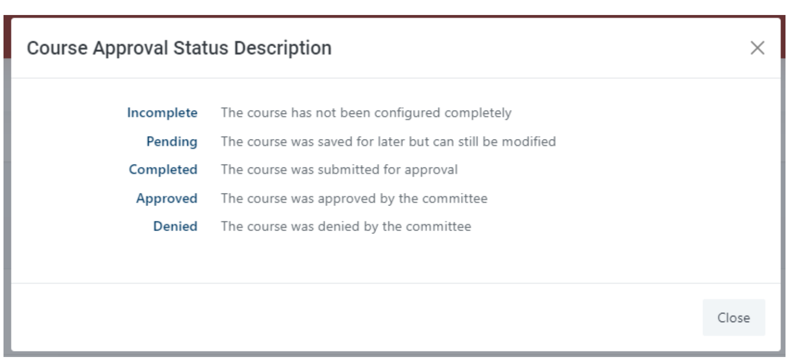
2) In the **View Courses** section, you will see a list of all the courses that have been submitted and their **Course Status**.


Show 10 entries

Course Title	Approval Status	Status	Area	Course Role
What is iRIS and How Do I get an Account?	Approved	Active	Compliance	Standard
Human Trafficking Policy and Awareness	Approved	Active	Compliance	Standard
Test	Pending	Inactive	Compliance	Standard
Contract and Procurement Training	Incomplete	Active	Compliance	Standard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard
Cash Fund Training	Approved	Active	Compliance	Standard
Cash Fund Training	Incomplete	Active	Compliance	Standard
2023 Conflict of Interest	Approved	Active	Compliance	Standard
2023 General Compliance Training	Approved	Active	Compliance	Standard
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard

Showing 161 to 170 of 188 entries

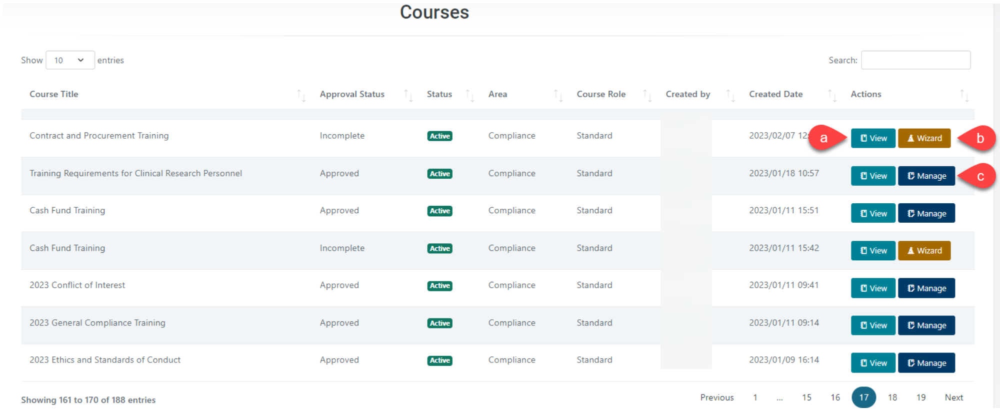
3) The following are the **Course Approval Status Descriptions**:


Course Approval Status Description

Incomplete	The course has not been configured completely
Pending	The course was saved for later but can still be modified
Completed	The course was submitted for approval
Approved	The course was approved by the committee
Denied	The course was denied by the committee

Close

4) You can also **View**, **Manage** or go to the **Wizard** option for the course.



Courses

Show 10 entries Search:

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Contract and Procurement Training	Incomplete	Active	Compliance	Standard		2023/02/07 12:	View, Wizard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard		2023/01/18 10:57	View, Manage
Cash Fund Training	Approved	Active	Compliance	Standard		2023/01/11 15:51	View, Manage
Cash Fund Training	Incomplete	Active	Compliance	Standard		2023/01/11 15:42	View, Wizard
2023 Conflict of Interest	Approved	Active	Compliance	Standard		2023/01/11 09:41	View, Manage
2023 General Compliance Training	Approved	Active	Compliance	Standard		2023/01/11 09:14	View, Manage
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard		2023/01/09 16:14	View, Manage

Showing 161 to 170 of 188 entries

Previous 1 ... 15 16 17 18 19 Next

a) If you click the **View** option, you will be able to see a full description for the course when you submitted it.

b) If you click the **Wizard** option, you will be able to update/correct anything from the course. This option will be available when the status is incomplete.

c) If you click the **Manage** option, you will be able to update/correct anything from the course. This option will be available when the course has been submitted and if denied, you will use this option.

5) When the course has been **approved/denied** by a Committee member, you will receive an automated email notification.

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To:
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

Approved By:

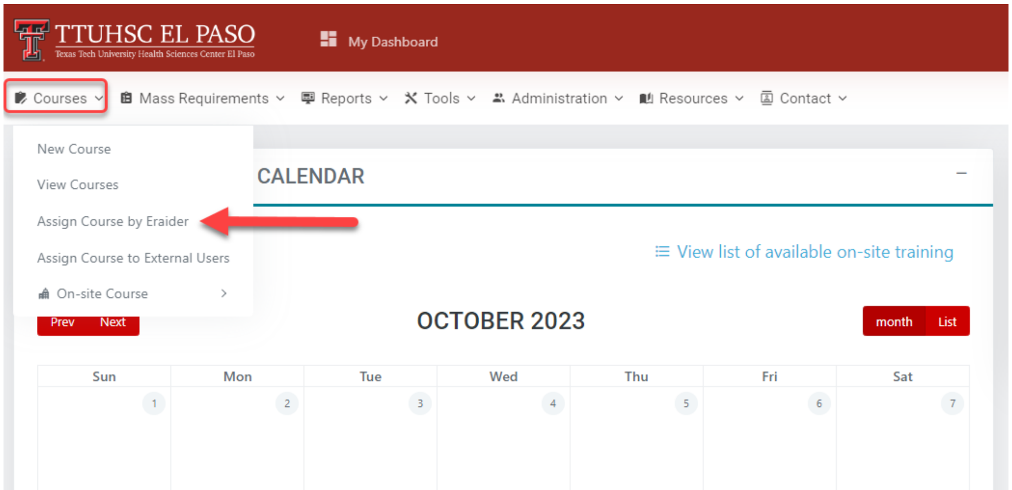
Approved Date: 12/31/2022

Comments:

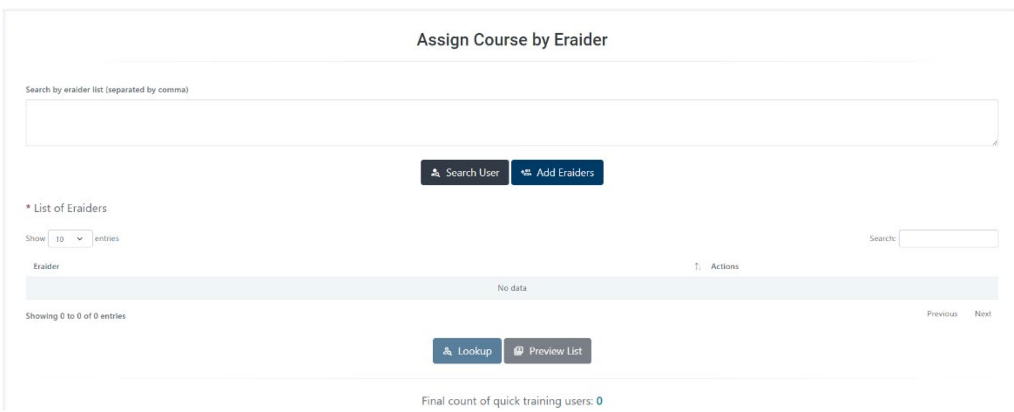
approve

COURSES – ASSIGN COURSE BY ERAIDER

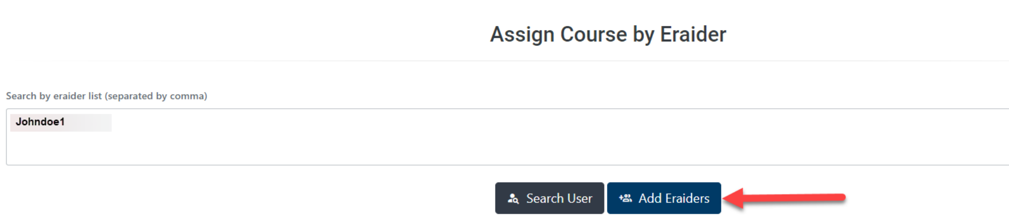
1) To assign a course by eRaider, click on **Courses** dropdown section, located on top of the page, then click on **Assign Course by eRaider**.



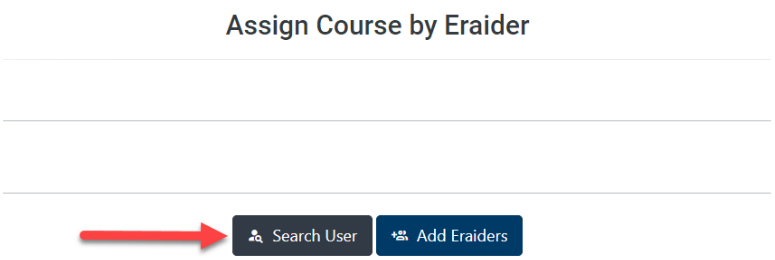
2) This will take you to the **Assign Course by eRaider** page.



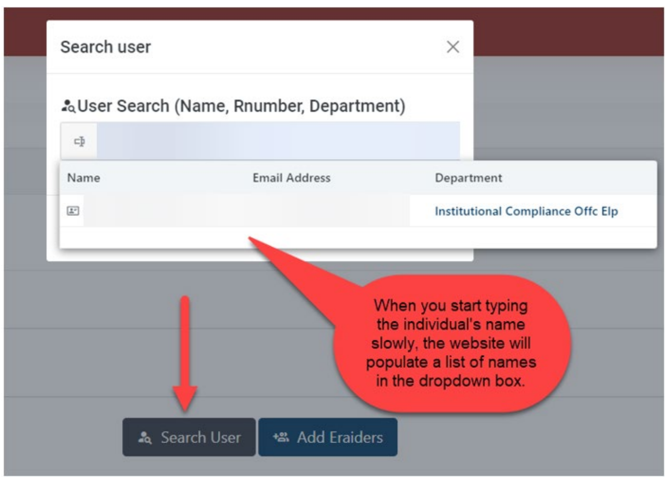
3) In the **Search by eRaider list** section, you can enter each eRaider individually (separated by commas). After you have entered all eRaiders that require training, click on **Add eRaiders** box at the bottom of the page.



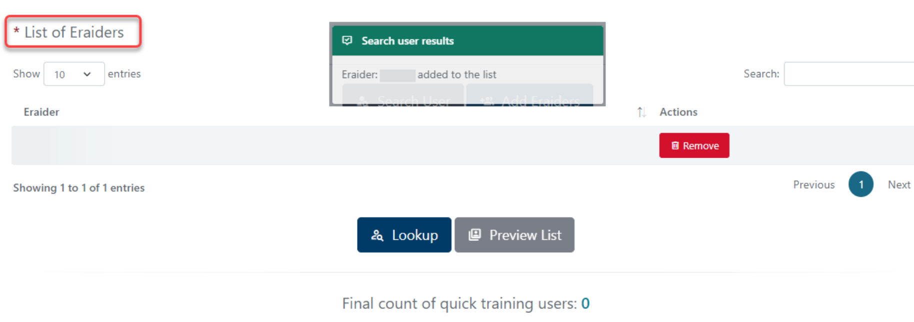
4) If you do not know the eRaiders for the individuals that require training, you can look up the individual at the **Search User** box.

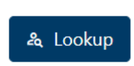


5) When you use the **User Search** box, a pop-up window will appear. In this section you can search by **name, r number** or **department**. You will have a dropdown list of names to choose from.

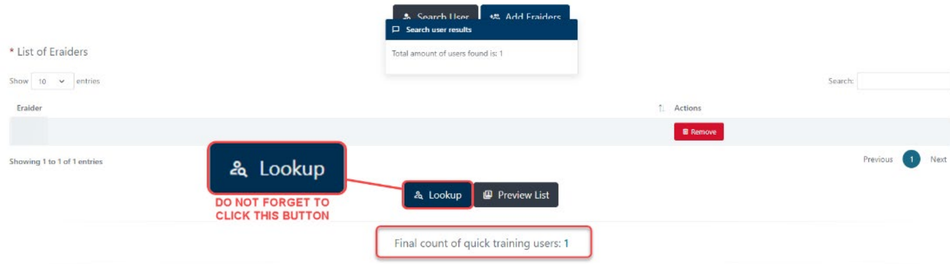


6) When you select the individual's name a pop-up screen will appear, after that, their eRaider will be added to the **List of eRaiders** section.

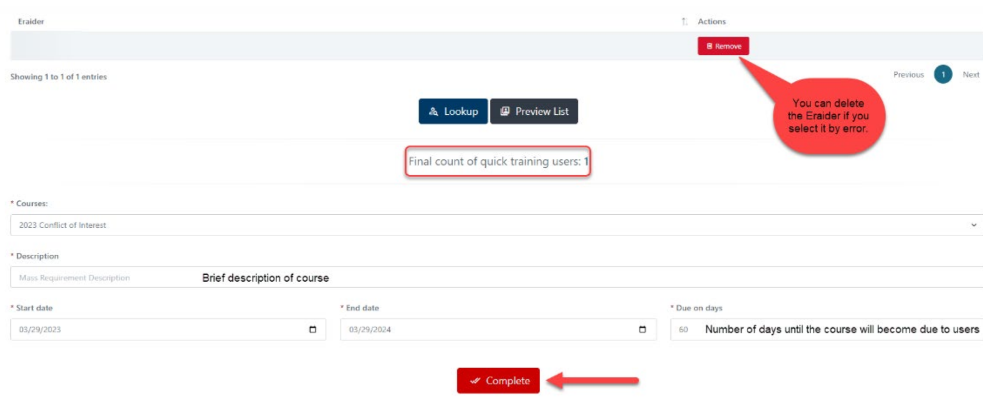


7) After making the selection of the users, click on the  button. This will give you a count of the users that will have the course assigned.

- If you click on the **Preview List** button, you will see a list of the users that have been selected.



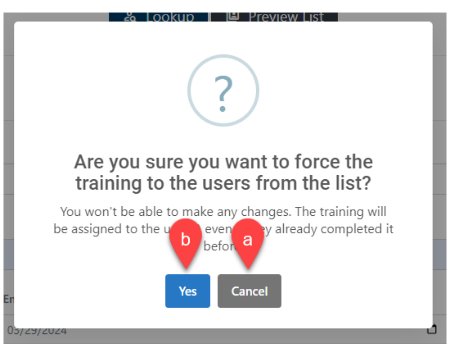
8) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Complete**.



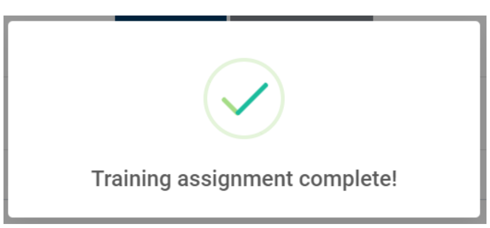
9) Next, a pop-up window will appear.

   a) Click **Cancel** to stay on **Assign Course by Eraider** section.

   b) Click **Yes** to proceed.



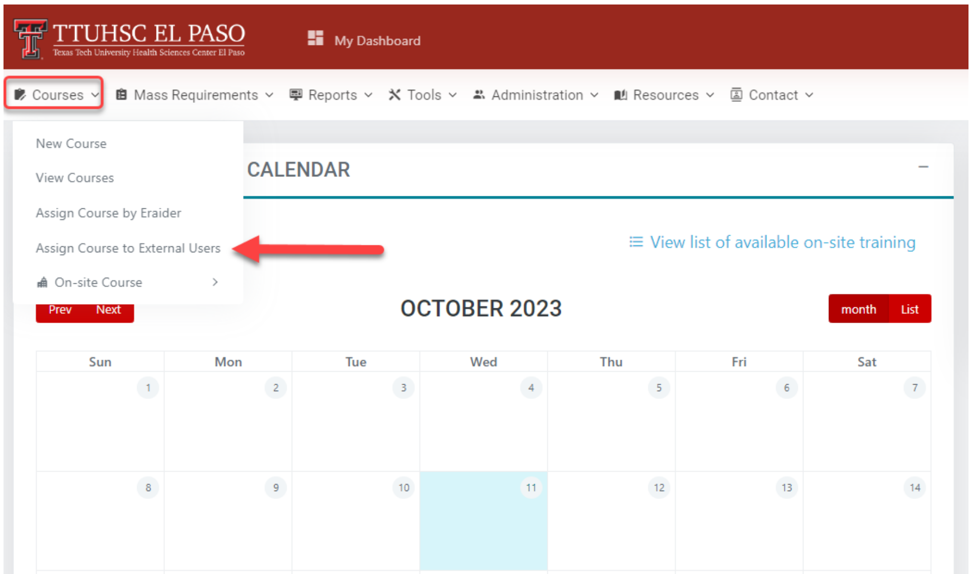
10) A pop-up notification will appear to confirm your submission.



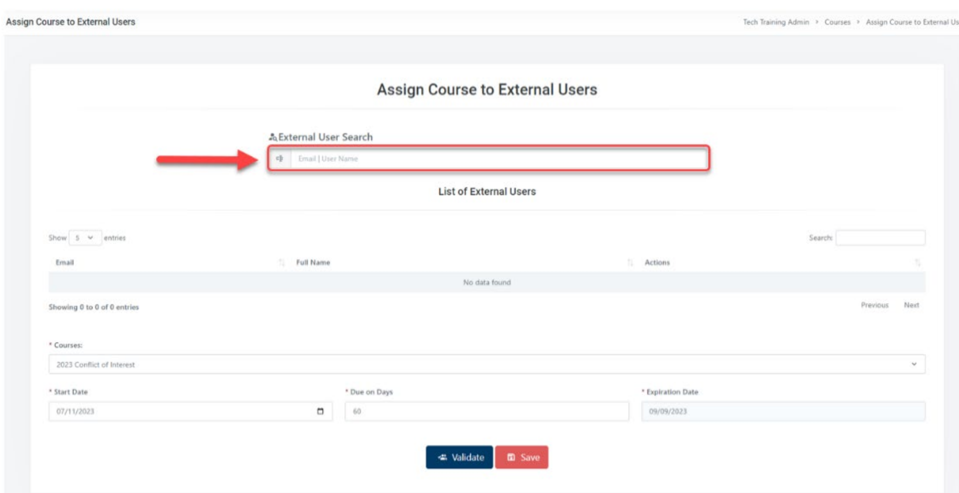
COURSES – ASSIGN COURSE TO EXTERNAL USERS

1) To assign a course to an external user, click on **Courses** dropdown section, located on top of the page, then click on **Assign Course to External Users.**

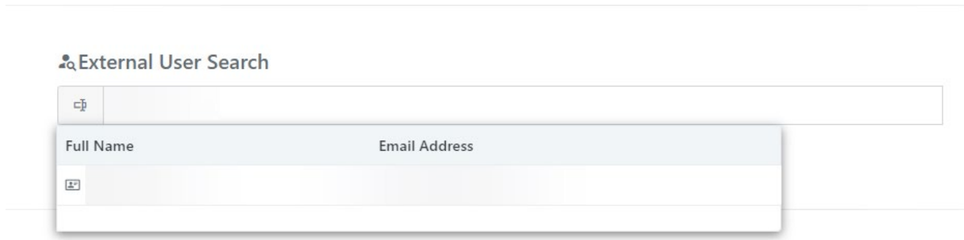
   Note: Remember, this feature is only available for an existing external user. If the external user hasn't been created, refer to the ***Manage External Users*** *section.*



2) This will take you to the **Assign Course to External Users** page.
   Note: This option will allow you to search by ***email, last name or first name*** *only.*

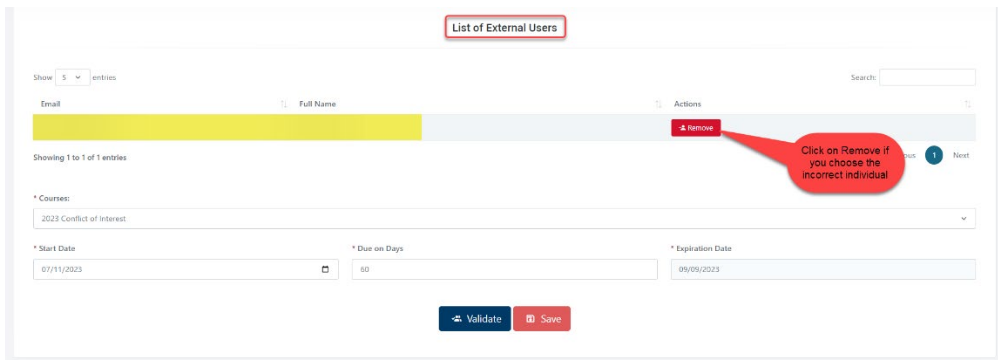


3) Next, type the name or email of the external user in designated field. A list of names will appear in a dropdown box. Click on the name of the individual.

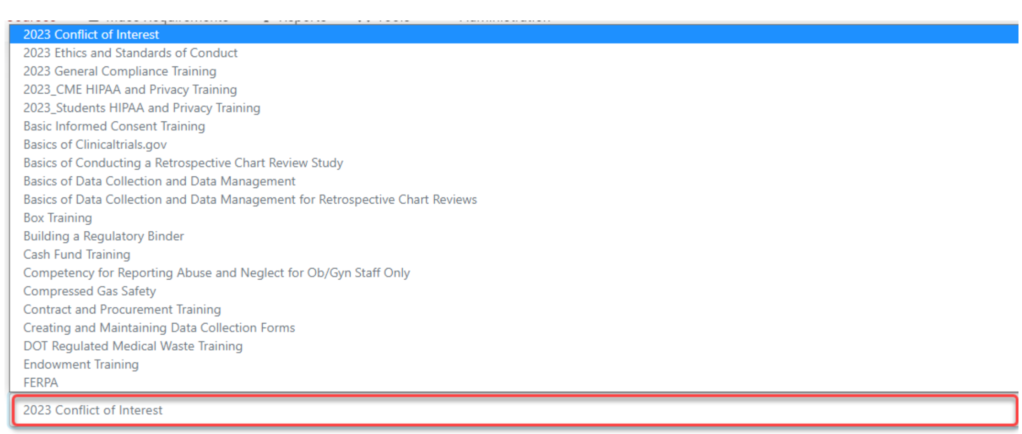


4) This will add the name to the **List of External Users**. Fill out the required fields.

   Note: Required fields are identified by an asterisk (*).



5) In the **Courses** dropdown box, you will have a list of trainings that can be assigned. Select the required course.



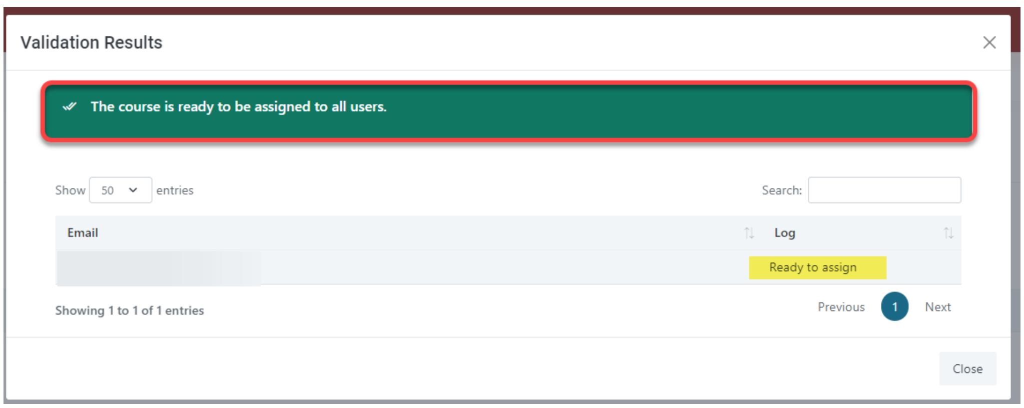
6) You can change the **Start Date**, **Expiration Date** and **Due on Days**.

   Note: if you change the Due on Days, the Expiration Date will be updated automatically.

7) Next, click on the 

button.

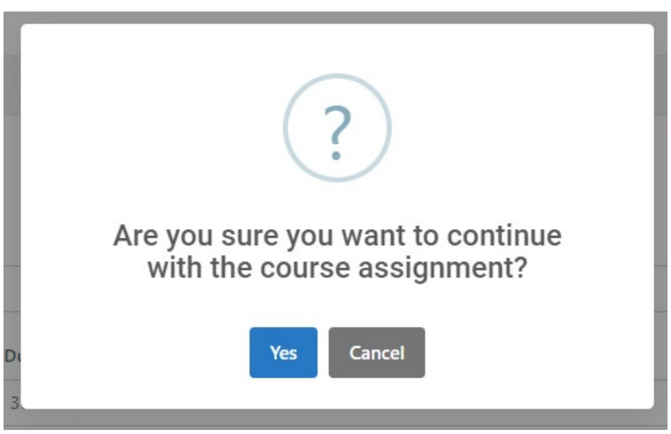
8) A pop-up message will appear stating that the courses have been assigned to the user(s). *Note: If the course has already been assigned, a red pop-up notification will state this. If multiple trainings will be assigned to an individual, repeat steps 5-7.*



9) Next, click on the 

button at the bottom of the page.

10) A pop-up box will ask you if you are sure to continue. Click **Yes** to continue and **Cancel** to go back.



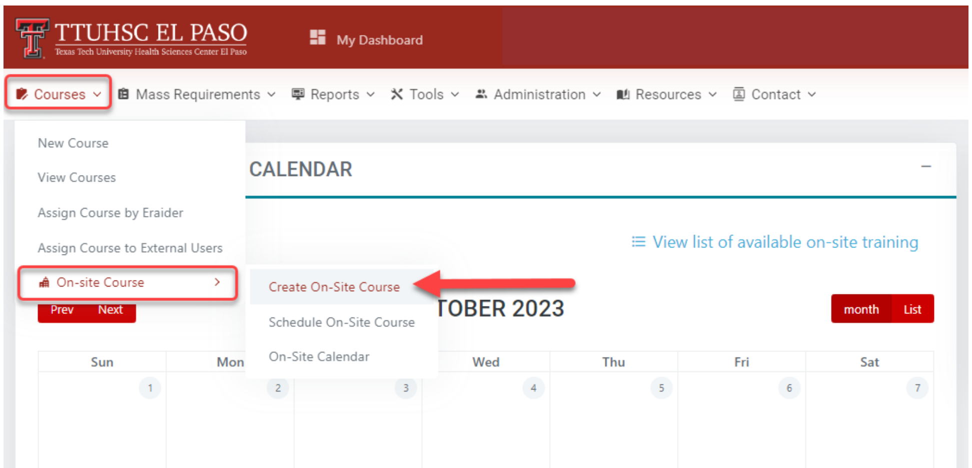
11) To verify that you have successfully assigned the training(s), go to **Manage External Users** and click on **View**. For more information on this, please refer to the ADMINISTRATION – Manage External Users section.

COURSES – CREATE ON-SITE COURSE

This feature will allow the user to create a course outline for individuals to register for a live, WebEx or online training session. Individuals will be able to self-enroll via the Tech Training application calendar.

Note: This feature will only be available for PowerUser, Administrator, and Committee roles.

1) To create an On-Site Course, click on the **Courses** dropdown → **On-Site Course** → then click on **Create On-Site Course**. You will see the following screen:



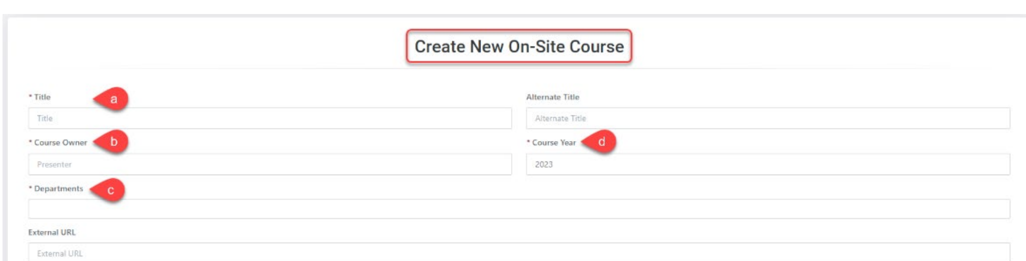
2) You will be directed to the **Create New On-Site Course** screen. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

   a) **Title** – Enter your desired title.
      - **Alternate Title** – This field can be left blank or you can type in the same as the Title.

   b) **Course Owner** – Type the name of the person presenting the training.

   c) **Departments** – Choose the departments that will be able to see the course.

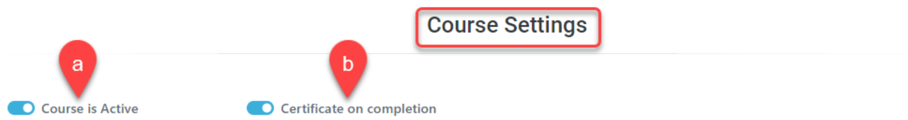
   d) **Course Year** – Select the current year.



3) Next, scroll down the page and in the **Course Settings** section:

a) Leave the **Course is Active** toggle button blue if you want everybody to see the course. If disabled, only the individuals with Administrator and PowerUser role will be able to see the course.

b) Leave the **Certificate on completion** toggle button blue so the users can download the certificate after passing the training.



4) In the **Course Details** section, fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

   a) **Course Description** – enter a short description of the course.

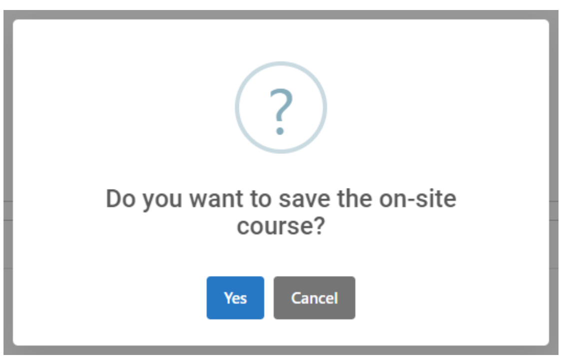
   b) **Objectives** – outline the goals for the user upon the completion of this course.

   c) **Outline** – enter a general description of the course content and instructions.

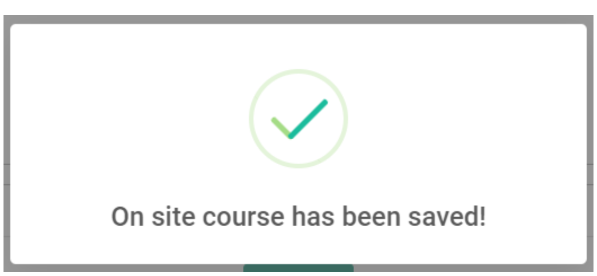
5) Click on the 

button to continue.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the **Create New On-Site Course** screen, click **Cancel**.*



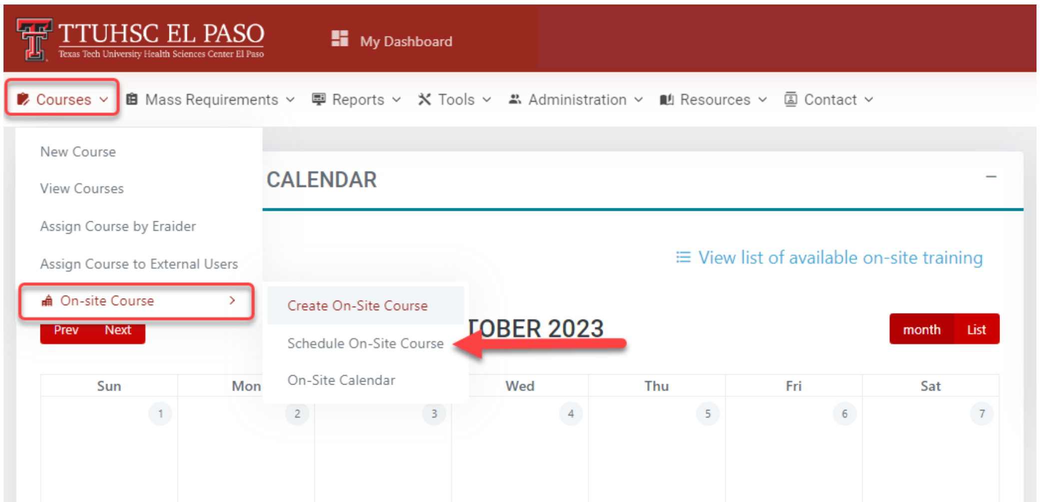
7) Once you click **Yes**, you will see the pop-up screen below confirming the course has been saved.



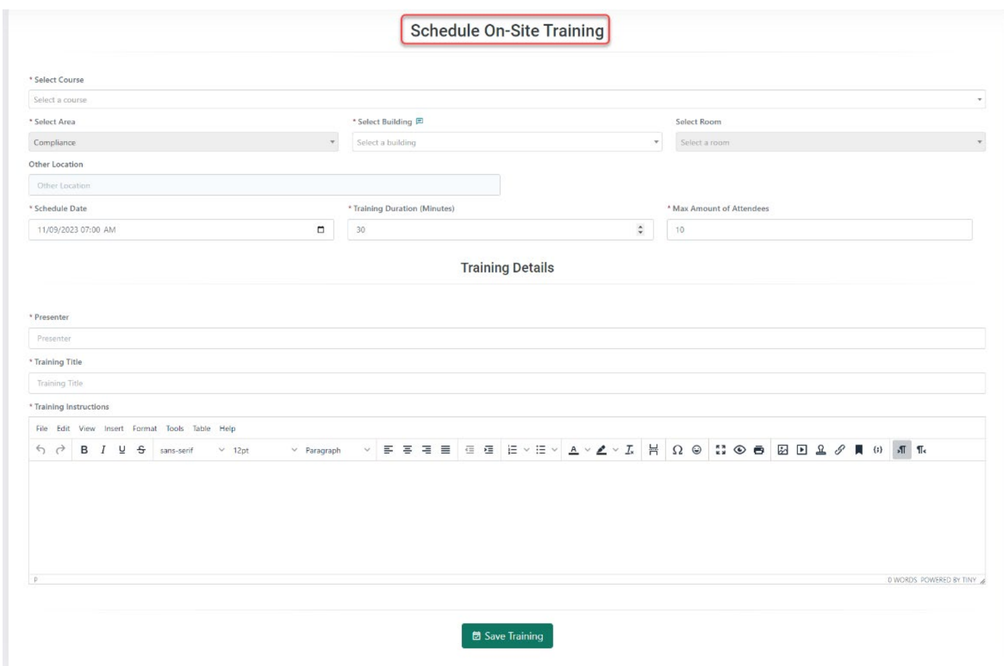
COURSES – SCHEDULE ON-SITE COURSE

This feature will allow users to set a time and place for the On-Site courses created.

1) To set a time and place for your course, click on the **Courses** dropdown → **On-Site Course** → then click on **Schedule On-Site Course**.



2) You will be directed to the **Schedule On-Site Training** screen.

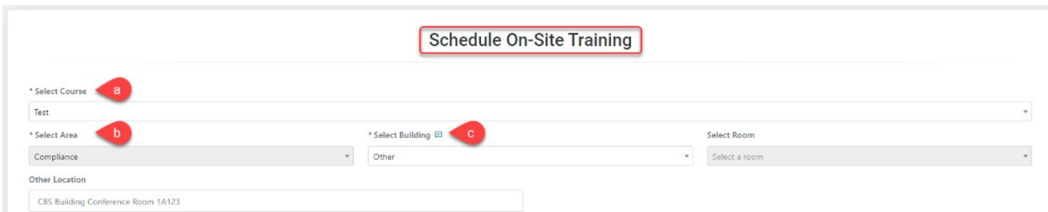


a) **Select Course** – In the dropdown field, select the training you created.

b) **Select Area** – This field will automatically populate with your department.

c) **Select Building** – In the dropdown field, select the building that the training will be scheduled at for users to attend. If your desired building is not listed, select the **Other** option. Once the building is selected, you will be able to select the room.

- **Select Room** – In the dropdown field, select the room number.
- **Other Location** – If you choose the **Other** option in the **Select Building field**, type your desired building and room number.

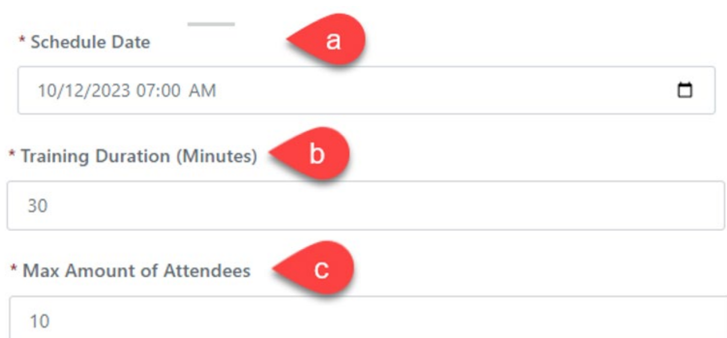


3) Scroll down and fill in the following fields.

a) **Schedule Date** – Select the date and time of the training session.

b) **Training Duration** – Indicate the length of time, in minutes, the training will take.

c) **Max Amount of Attendees** – Indicate the maximum amount of people that can attend the training session.



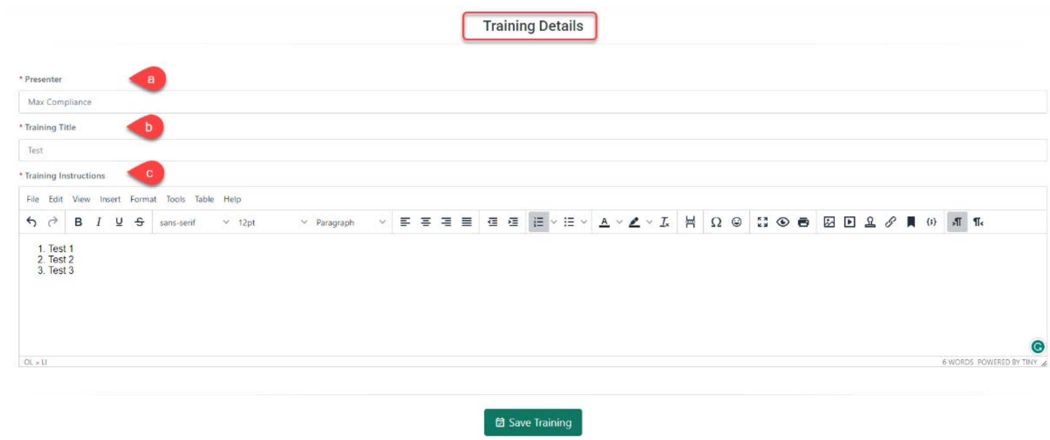
4) Next, go down the page and in the **Training Details** section, fill out the required fields.

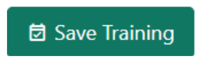
Note: Required fields are identified by an asterisk (*).

a) **Presenter** – Name of the person who is presenting the training.

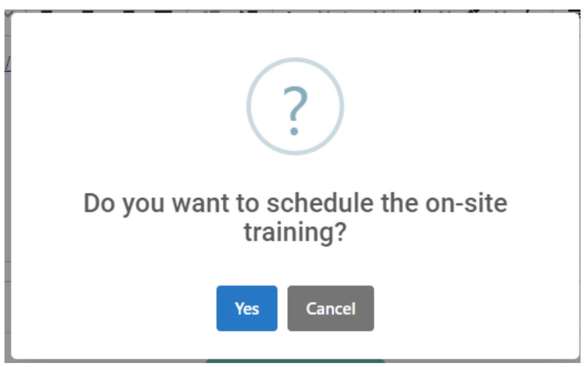
b) **Training Title** – Type the name of the course you created.

c) **Training Instructions** – Indicate what the users are going to do in the training session or if they will need to log in to web-based training.

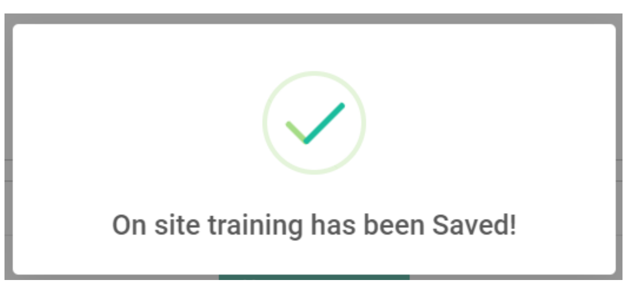


5) When you are ready, click on the  button.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Schedule On-Site Training screen, click **Cancel**.*



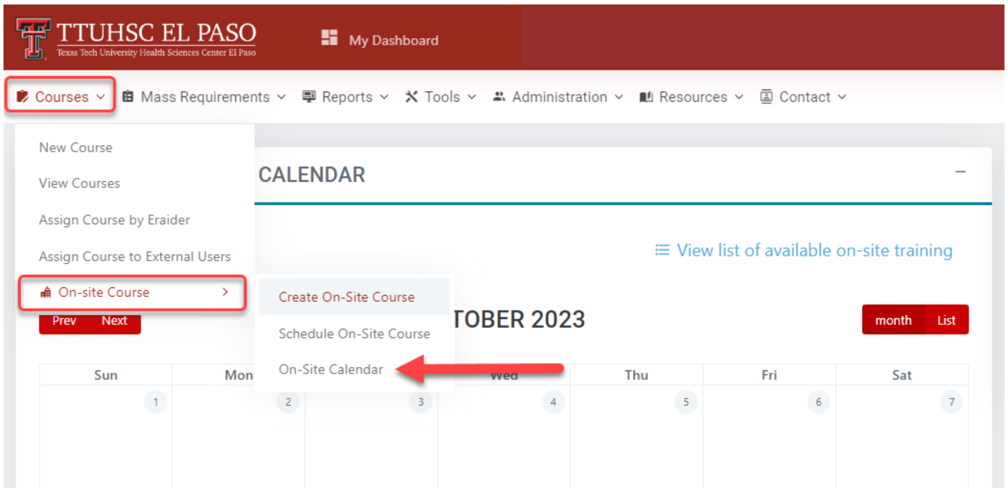
7) Once you click **Yes**, you will see the pop-up screen below confirming the On-Site training has been saved.



COURSES – ON-SITE CALENDAR

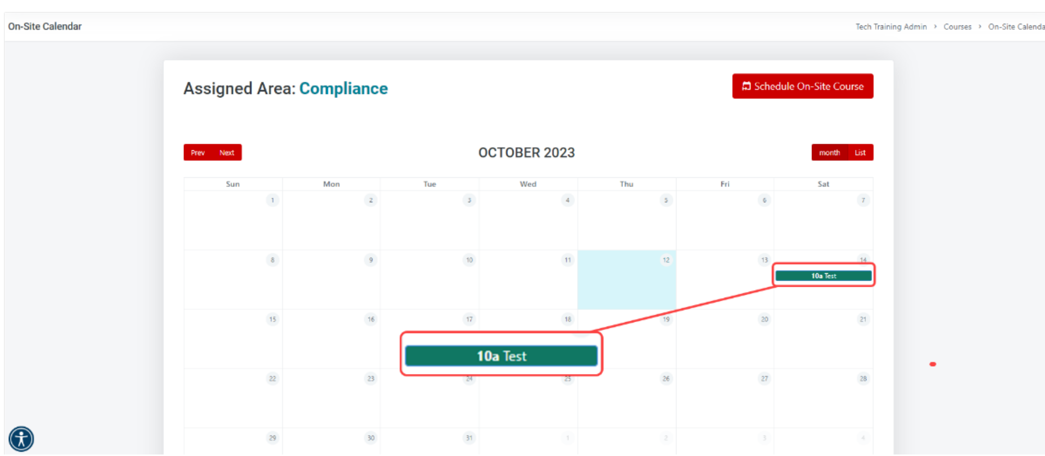
This feature will allow the user to modify/update the **On-Site Training** details such as the course, the area, location, duration, training instructions, etc.

1) To see the **On-Site Calendar**, click on the **Courses** dropdown → **On-Site Course** → then click on **On-Site Calendar**.

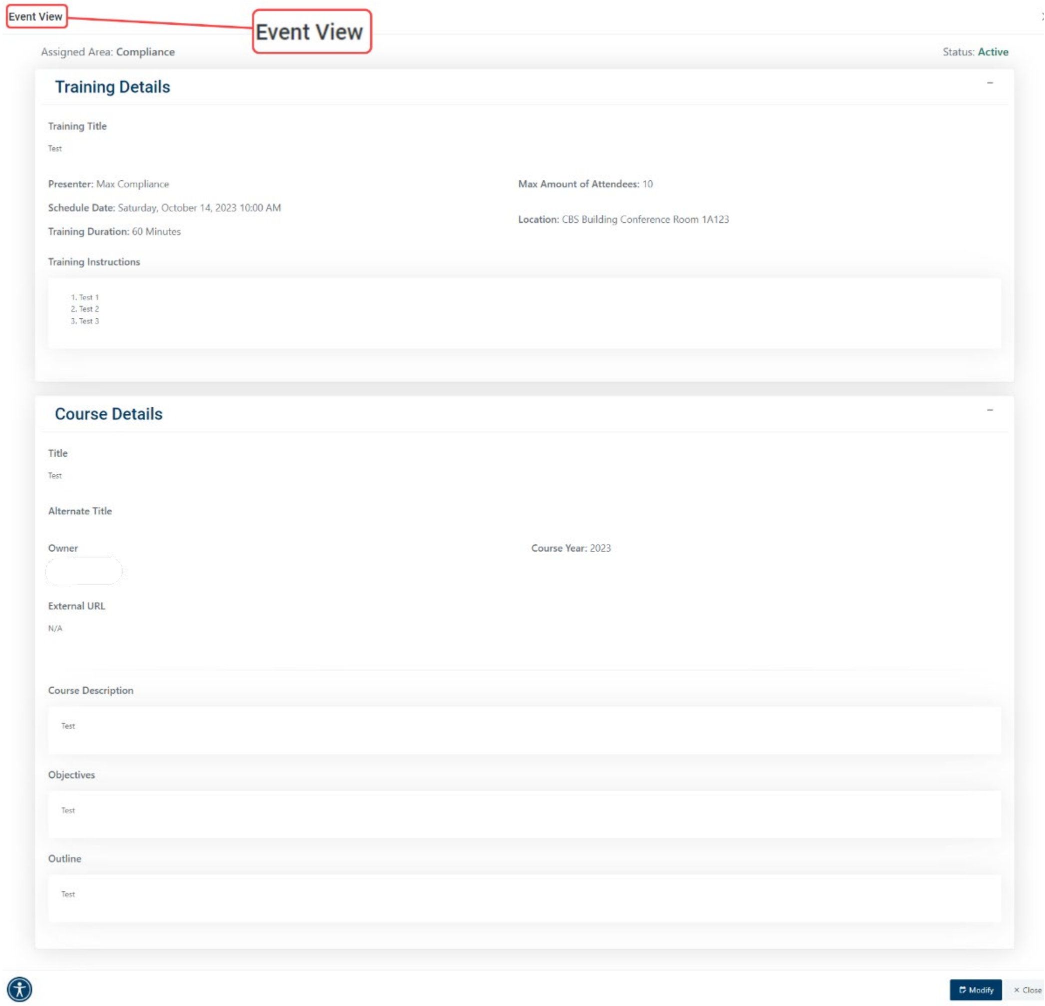


2) You will be directed to the **On-Site Calendar**. The available courses will appear in the calendar.

   a) If you want to see the details for that course, click on the name of the course.



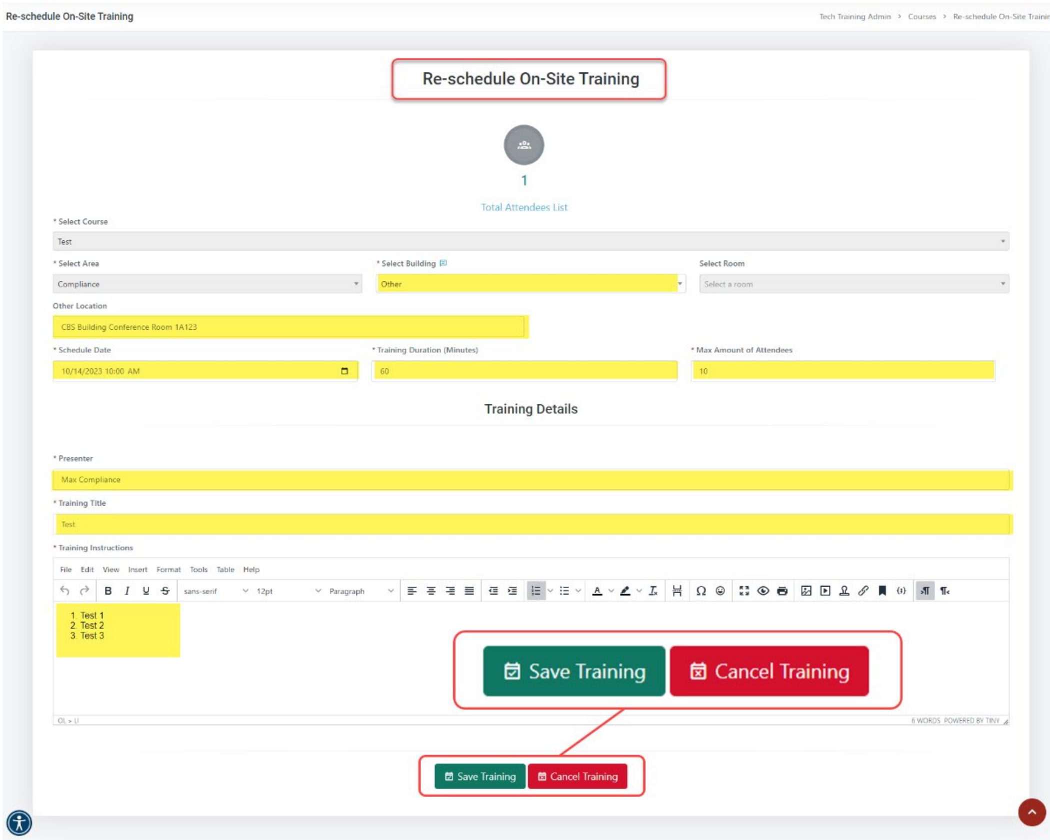
3) Next, you will see the **Event View** screen. In this page you will be able to see all details for that course.



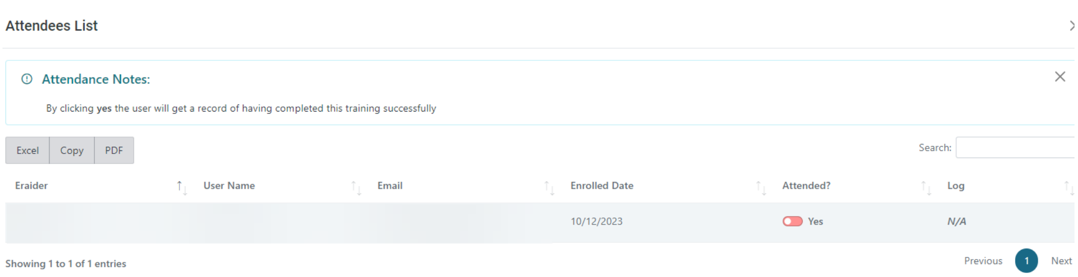
4) To modify/update the information for the course, click on the Modify button at the bottom of the page.

5) You will be directed to the **Re-schedule On-Site Training** page. You can change/update the building, location, date, duration, and number of attendees, presenter, title, and instructions.

Note: Do not forget to click on Save Training if you change/update any information. You can also cancel the training if desired.



a) To see the list of attendees, click on the Total Attendees List link at the top of the page. You will see the following list:

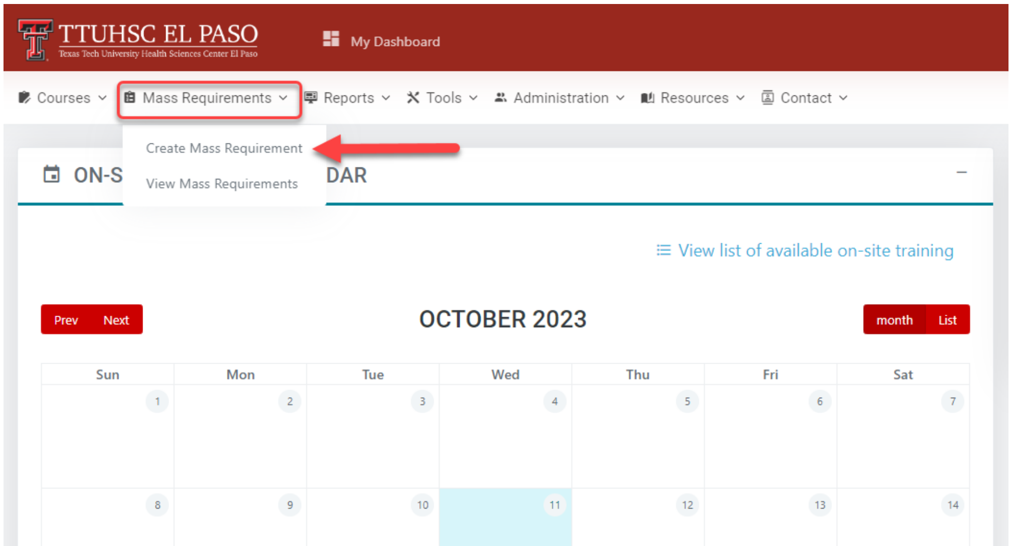


Note: If the training has ended, you can no longer make changes to the training.

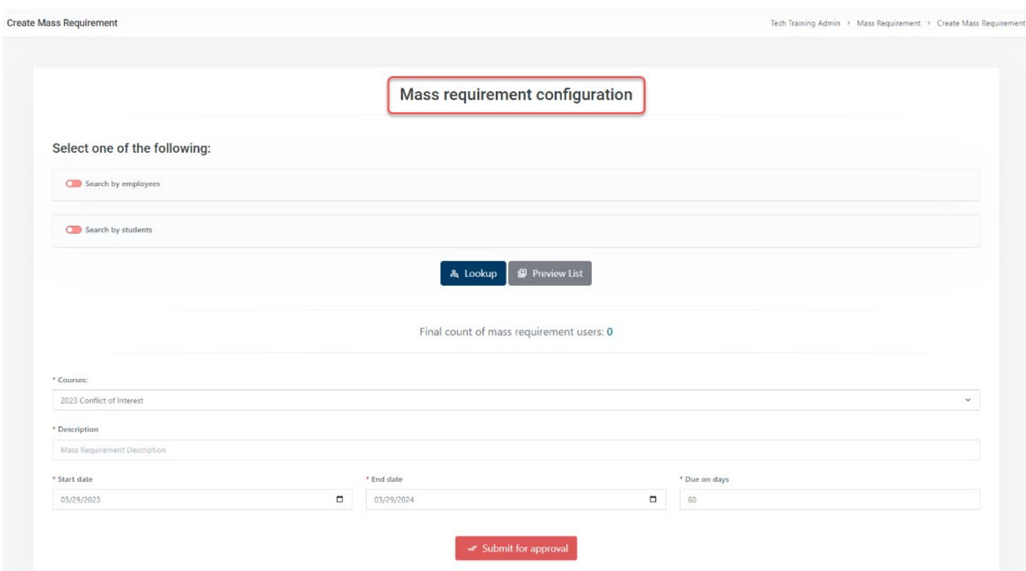
b) At this point, the presenter can confirm attendance by the **Yes** toggle button in the **Attended?** Column. This gives the user credit for attending the training.

MASS REQUIREMENT - CREATE A MASS REQUIREMENT

1) To create a Mass requirement, click on the **Mass Requirements** dropdown section, located on top of the page, then click on **Create Mass Requirement**.



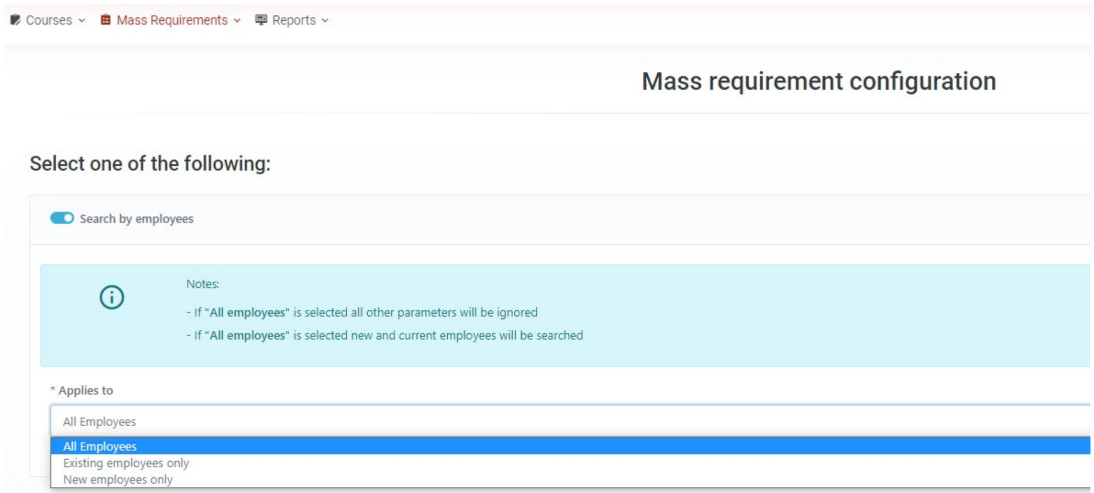
2) This will take you to the **Mass requirement configuration** page.



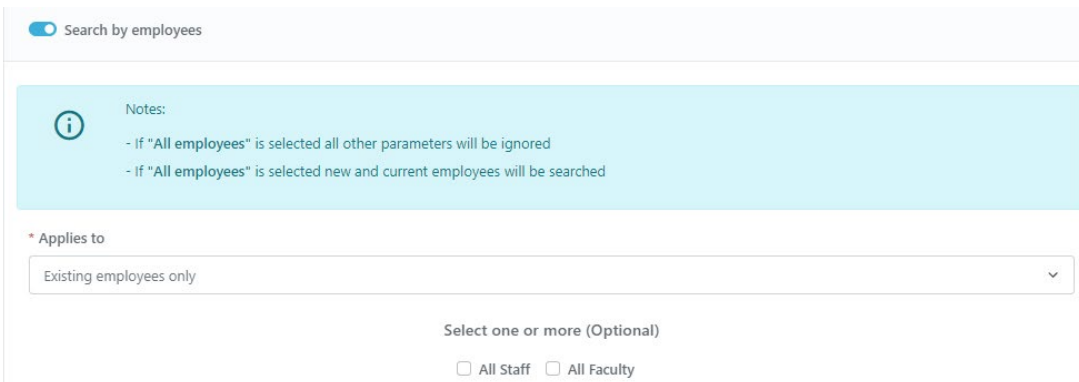
3) To use **the Search by employees** option:

   a) In the **Applies** to dropdown menu, you will be able to select **All Employees**, **Existing employees only** or **New employees only**.

      - The **All Employees** option will allow you to select all employees.



b) If you select **Existing employees only** or **New employees only**, you will have the option to choose **All Staff** or **All Faculty**. You may select both options at the same time, if needed.



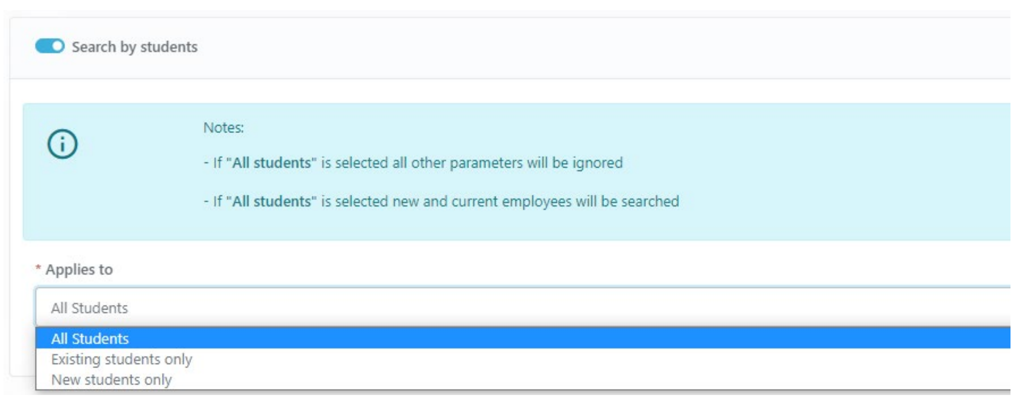
c) If you select **Existing employees only** or **New employees only:**

- You will have the option to select the department under the **Select a department** dropdown box and the positions under the **Select a position** dropdown box.

4) To use the **Search by students** option:

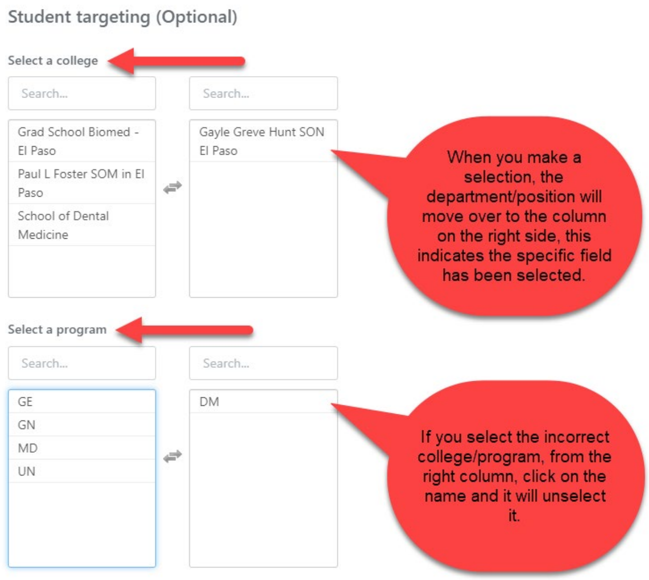
a) In the **Applies to** dropdown section you will have 3 options: **All Students, Existing students only** and **New students only**.

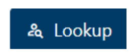
- The **All Students** option will allow you to select all students.



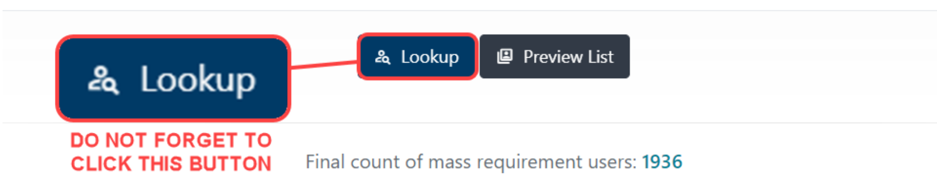
b) If you select **Existing Students only** or **New students only**:

- You will have the option to select any **college/program**. Click on the desired college/program under the **Select a college** and **Select a program** dropdown boxes.

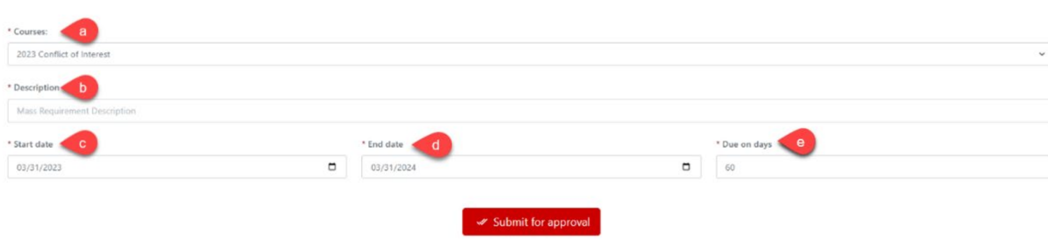


5) After making the selection of the users, click on the 

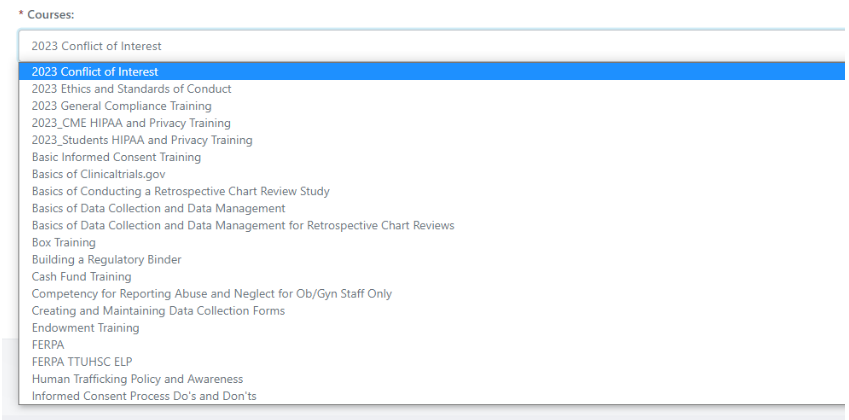
button. This will give you a count of the users that will be assigned to the mass requirement.
If you click on the **Preview List** button, you will see a list of the users that will be assigned to the mass requirement.



6) Next, you will scroll down to the bottom portion of the **Mass requirement configuration**.



a) The **Courses** section will have a dropdown menu where you can select the course you need.



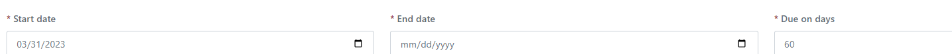
b) Enter a brief description in this section:

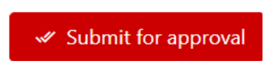
c) **Start date** – Enter the current date

*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

d) **End date** – Enter the last day of the current calendar year. This ensures that the course remains active for the calendar year. (Remember, each calendar year you will be required to upload the course and obtain Committee approval.)

e) **Due on days** – Enter the number of days the users have to complete the course.



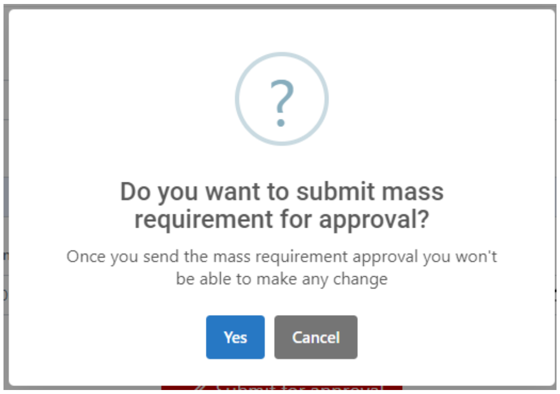
7) Once you have entered all the required fields, click on the 

button at the bottom of the page.

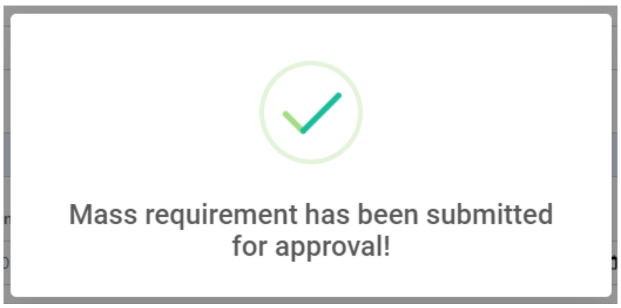
8) You will see the following pop-up:

a) If you are ready to submit the mass requirement, click **Yes** to submit for approval.

*Note: If you need to back to the **Finish** tab, click **Cancel**.*



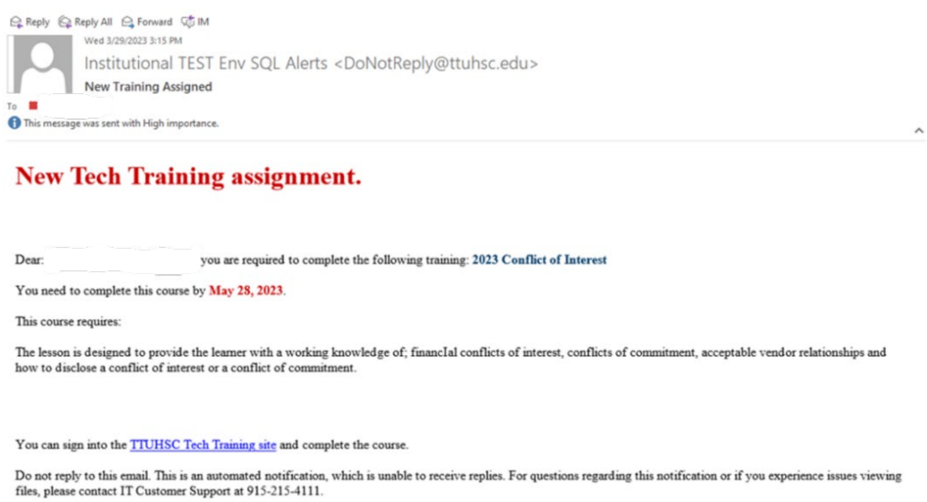
9) If you click **Yes**, you will see the following notification:



10) The **Mass Requirement** will be routed for approval to the Committee before the training is assigned.

11) To check on the **Mass Requirement** approval status, refer to the **Mass Requirement Report**.

12) Once the **Mass Requirement** has been approved by the Committee, the users will receive an email notification stating the training has been assigned.



Reply Reply All Forward IM

Wed 3/29/2023 3:15 PM

Institutional TEST Env SQL Alerts <DoNotReply@ttuhsc.edu>

New Training Assigned

To

This message was sent with High importance.

New Tech Training assignment.

Dear: you are required to complete the following training: **2023 Conflict of Interest**

You need to complete this course by **May 28, 2023**.

This course requires:

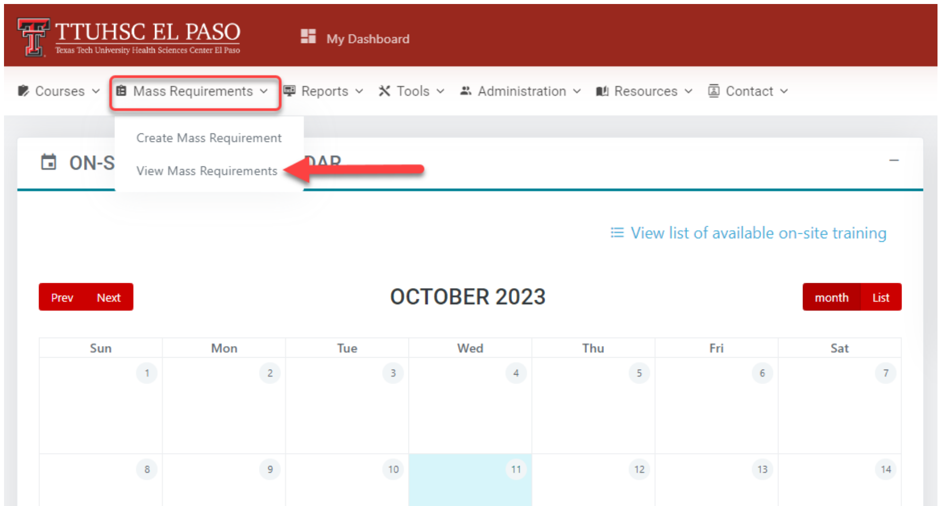
The lesson is designed to provide the learner with a working knowledge of; financIal conflicts of interest, conflicts of commitment, acceptable vendor relationships and how to disclose a conflict of interest or a conflict of commitment.

You can sign into the TTUHSC Tech Training site and complete the course.

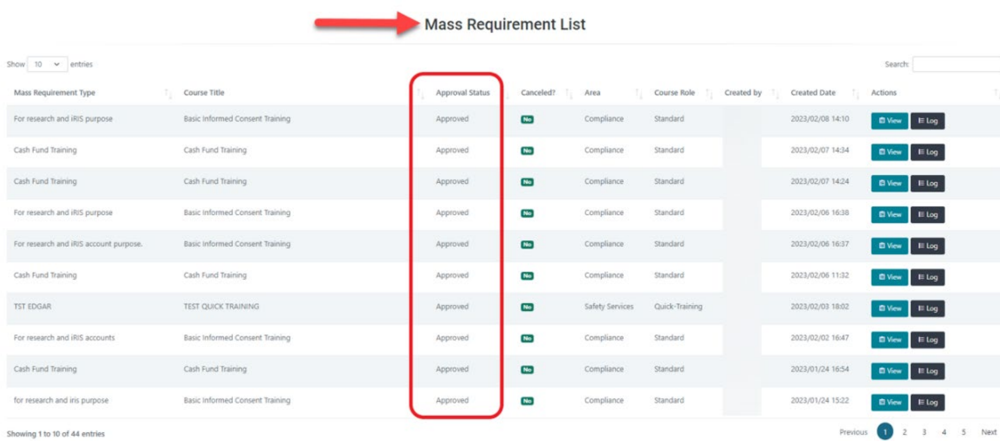
Do not reply to this email. This is an automated notification, which is unable to receive replies. For questions regarding this notification or if you experience issues viewing files, please contact IT Customer Support at 915-215-4111.

MASS REQUIREMENT - VIEW MASS REQUIREMENT

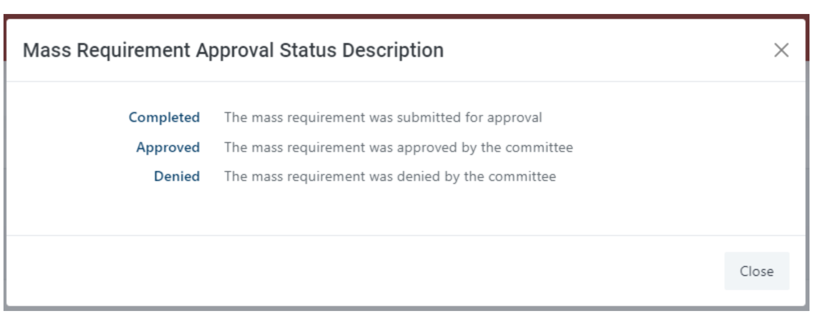
1) To check the status of a mass requirement, go to the **Mass Requirement** dropdown and click on **View Mass requirements**.



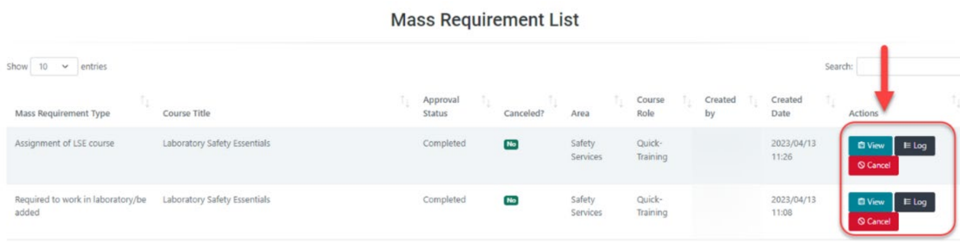
2) This will take you to the **Mass Requirement List** where you can check on the status of the assignment in the **Approval Status** column.



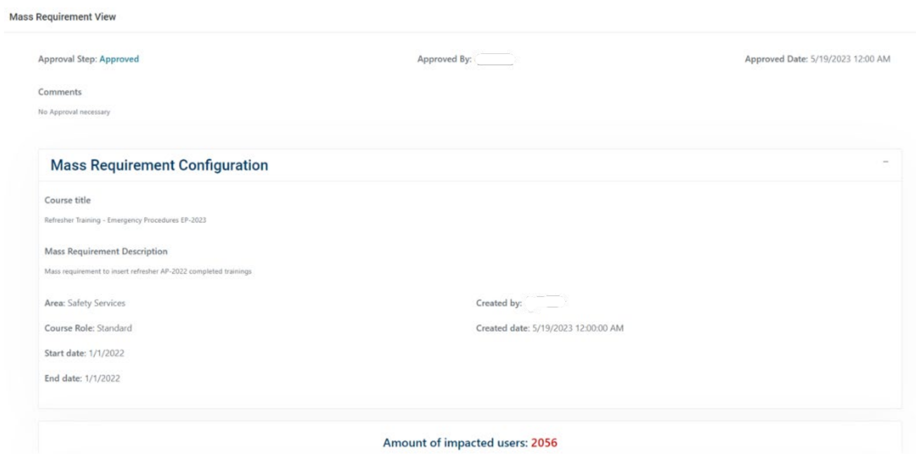
a) Click on the top right side of the page to see the **Approval Status Descriptions**.



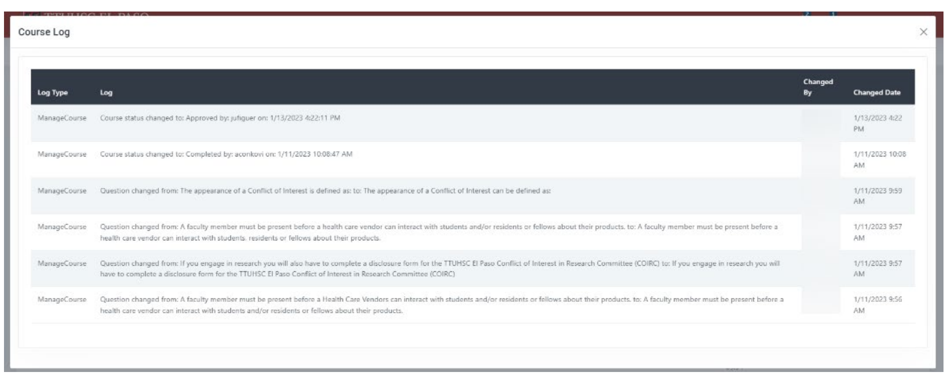
3) In the **Actions** column, you can select **View**, **Log or Cancel** buttons.

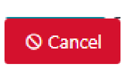


a) If you click on the **View** button, you will be able to look at detailed information entered in the **Mass Requirement**.



b) The **Log** button will show you the **Course Log**. This section will display the history of the **Mass Assignment.**



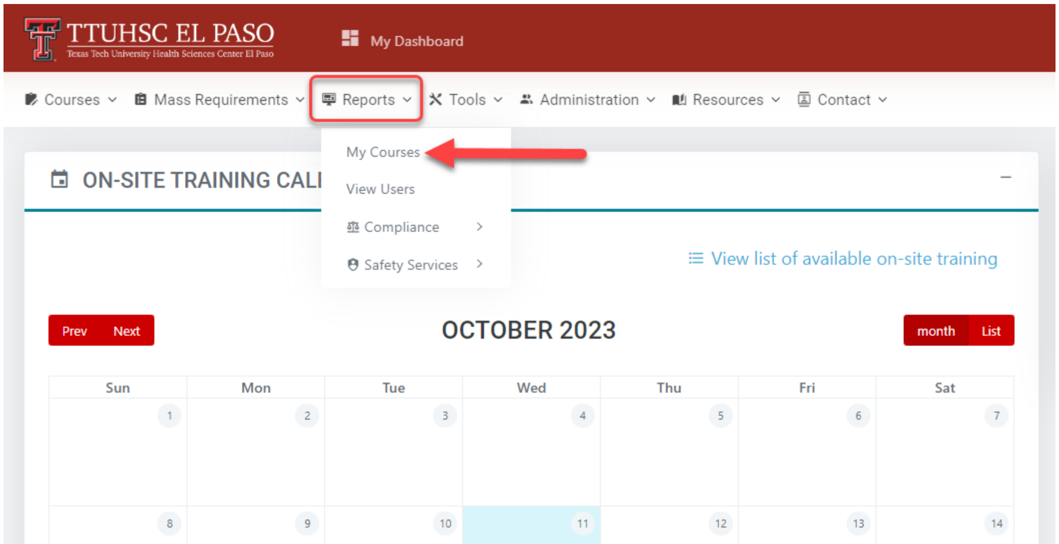
c) The 

button will delete the mass requirement.

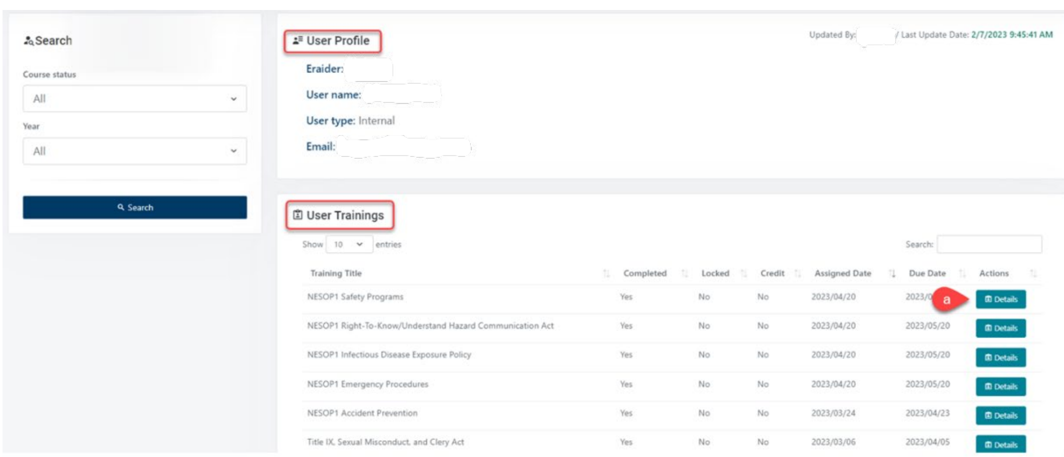
Back to Top

<u>REPORTS – MY COURSES</u>

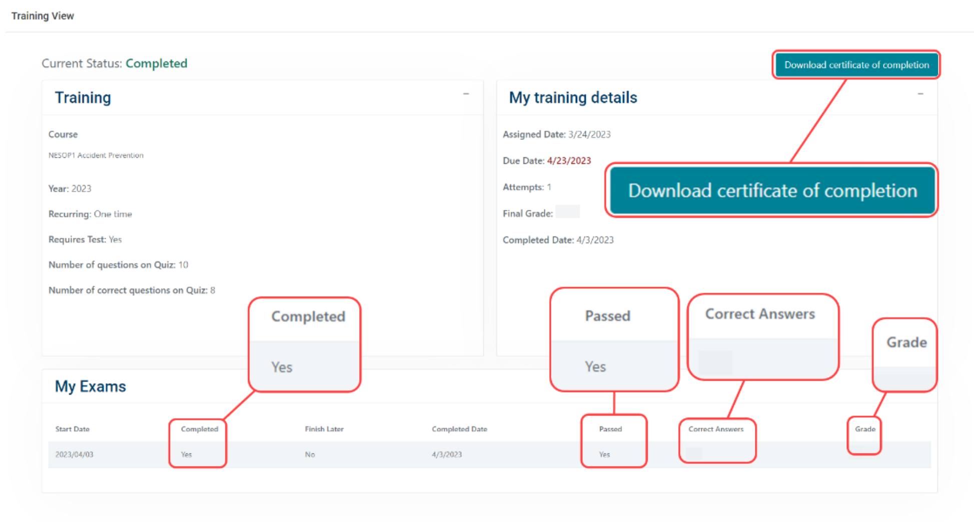
1) To check your profile and course status, click on **Reports** dropdown section, located on top of the page, then click on **My Courses**.



2) Next, you will see the following page. In this page you will find your personal information such as the **User Profile** and the **User Trainings**.

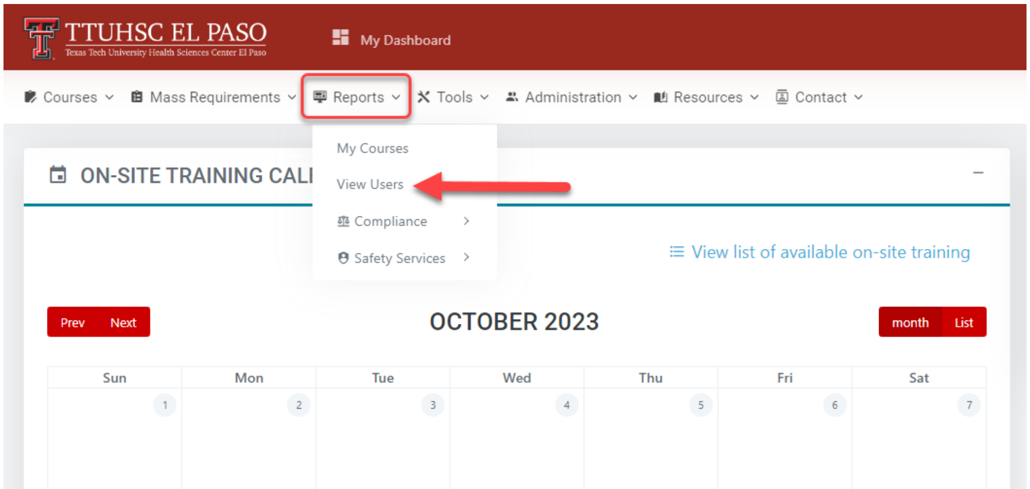


a) Under the **Details** button, you can get detailed information of the trainings you have been assigned. You can also **Download a certificate of completion**.

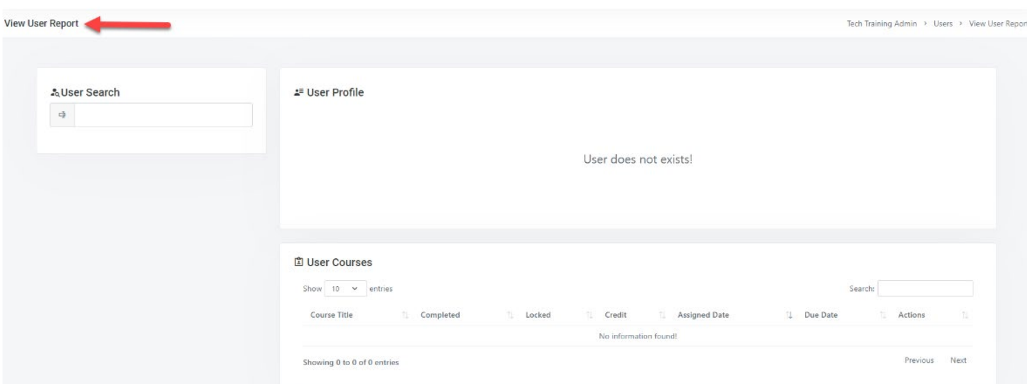


REPORTS – VIEW USERS

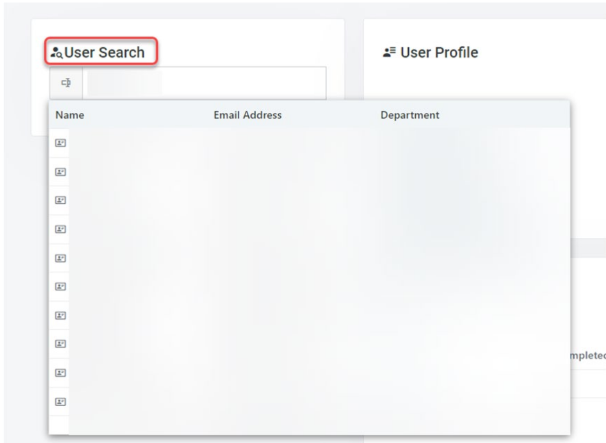
1) To search for users, click on **Reports** dropdown section, located on top of the page, then click on **View Users**.



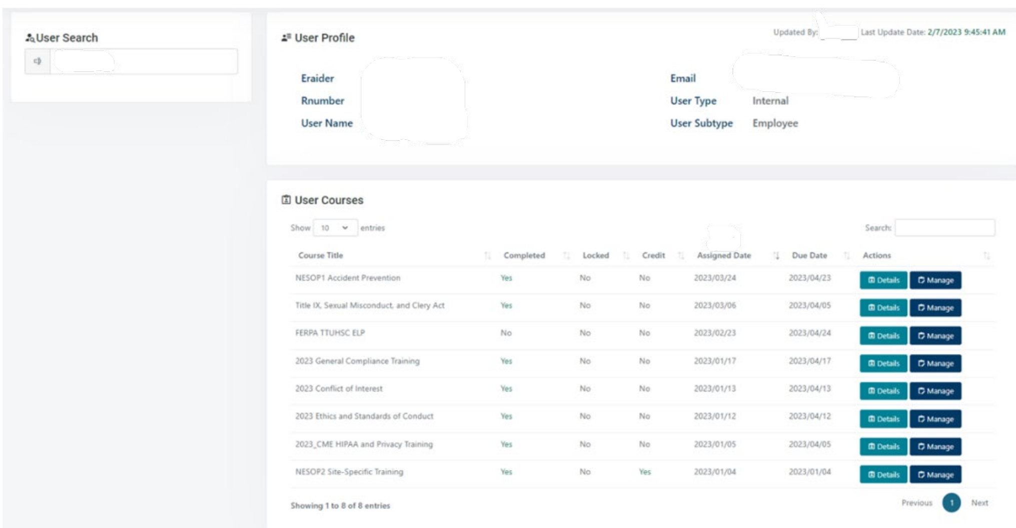
2) Next, you will find the **View User Report** page.



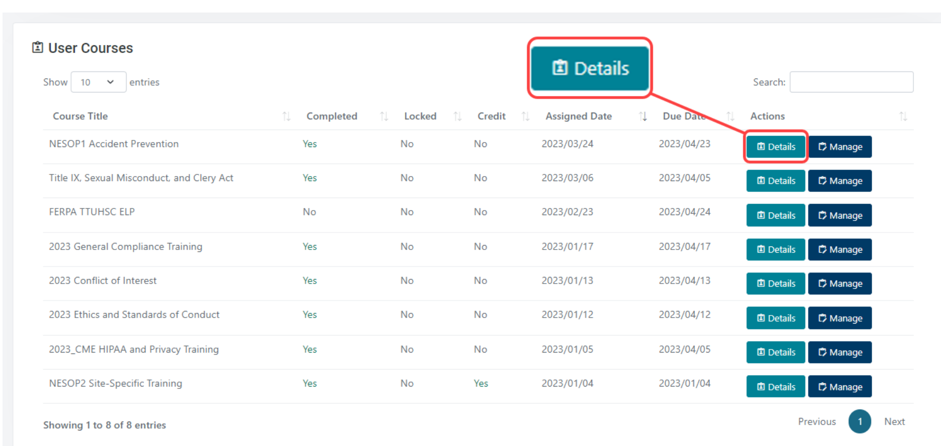
3) In the **User Search** section, you will be able to search for a specific user with their **eRaider, first name and/or last name**. A list of names will populate in a dropdown box.



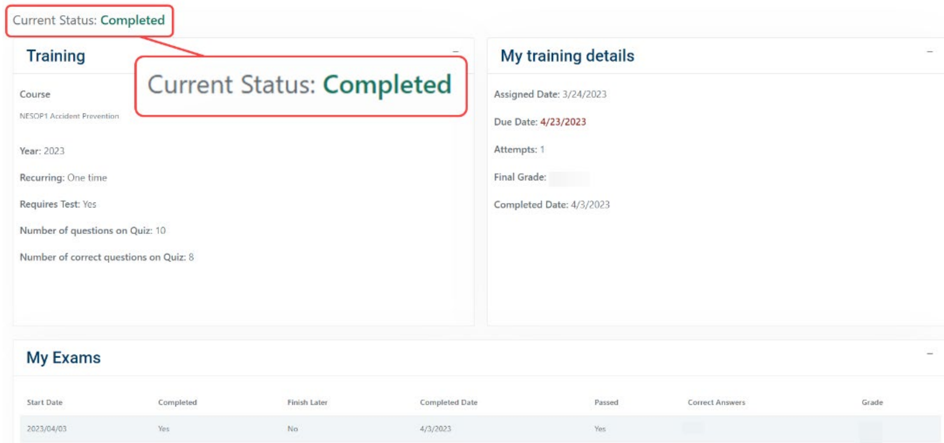
4) Select the name of the individual. The following page will display the **User Profile** and the **User Courses**.



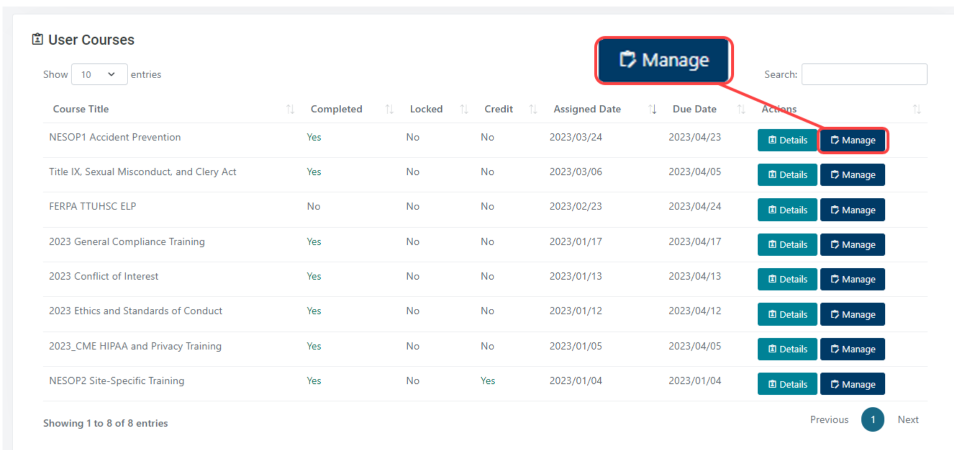
5) If you click on the **Details** blue button, it will direct you to the **View User Course Details** page.



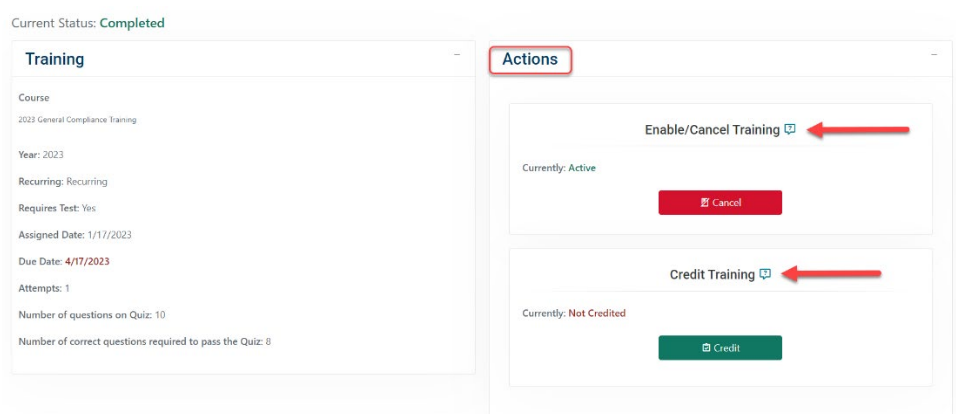
a) In this page you can see a detailed description of the trainings and exams the user has completed.



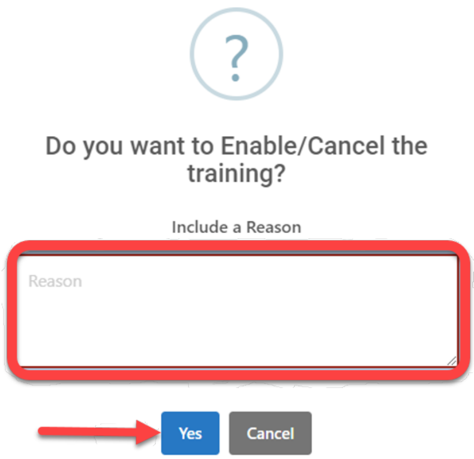
6) If you click on **Manage**, it will direct you to the **Manage User Course** page.



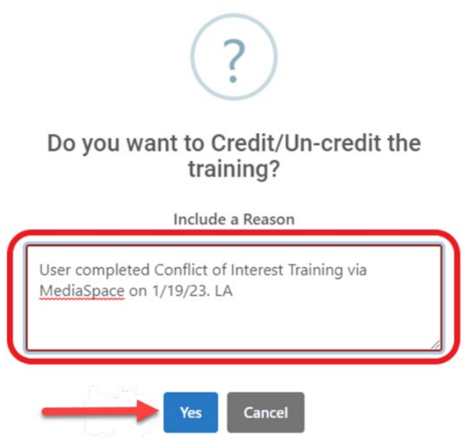
a) Under the **Actions** section, you will have two options, first you can **Enable/Cancel Training** and second you can give credit to an individual by clicking on the **Credit Training** button.



7) **Enable/Cancel Training**: If you click in this section a pop-up screen will appear. You will have to give the reason you want to cancel the training. After you are finish, click **Yes.**

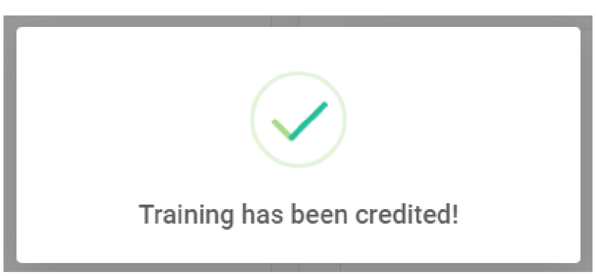


8) **Credit Training**: If you click on this section a pop-up message will appear. You will have to include a reason you want to give credit for the training. After you are finish, click **Yes**.

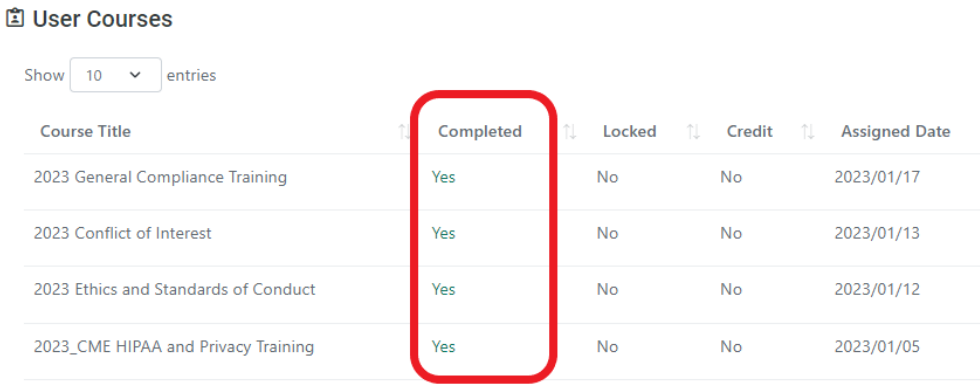


Note: Use the following template when including the reason; User completed (name of training) via MediaSpace or Canvas Catalog on (date). (Initials)"

a) Once you click **Yes**, you will see the following pop-up notification.



9) Next, under the **User Course** section you can verify if the credit was successfully applied to the training. Check for a **Yes** under the **Completed** section.

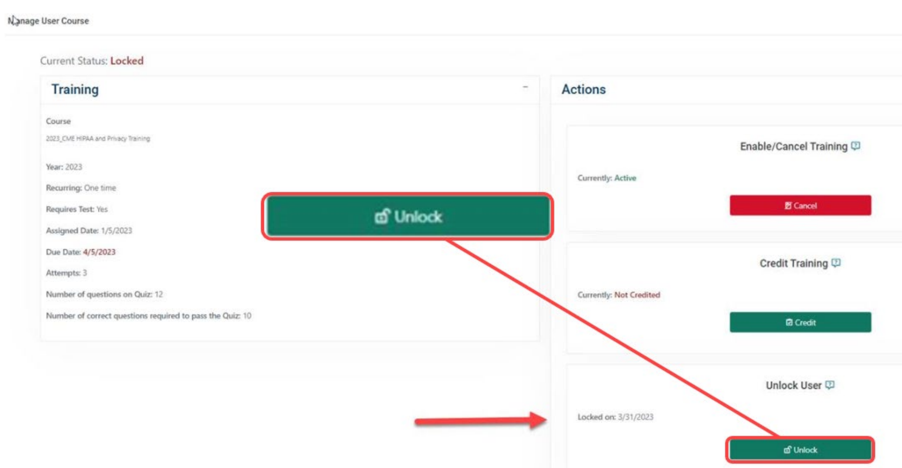


User Courses

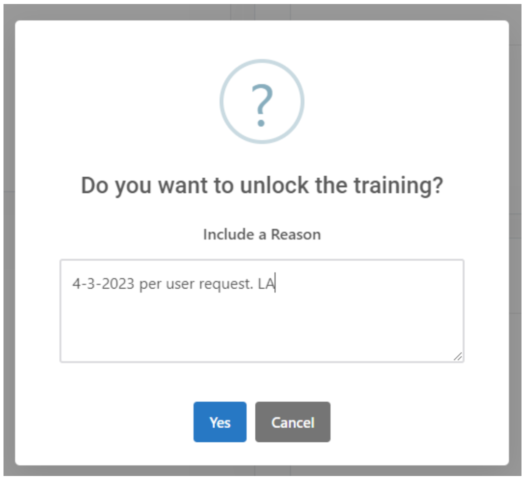
Show 10 entries

Course Title	Completed	Locked	Credit	Assigned Date
2023 General Compliance Training	Yes	No	No	2023/01/17
2023 Conflict of Interest	Yes	No	No	2023/01/13
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05

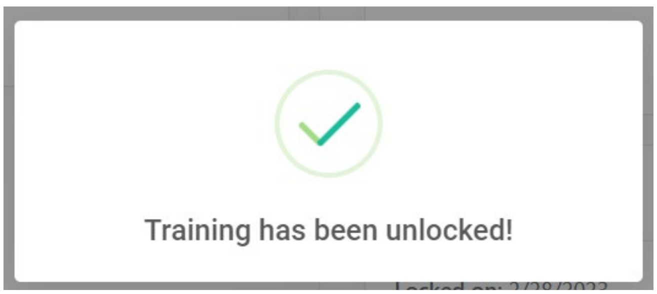
10) **Unlock User**: This option will display if the user has used all of their attempts and has not successfully passed the test, or if the user ran out of time. Click **Unlock.**



a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel**, if you made a mistake. Click **Yes** when you are ready.
   - Make sure you enter a brief message before confirming **Yes**.



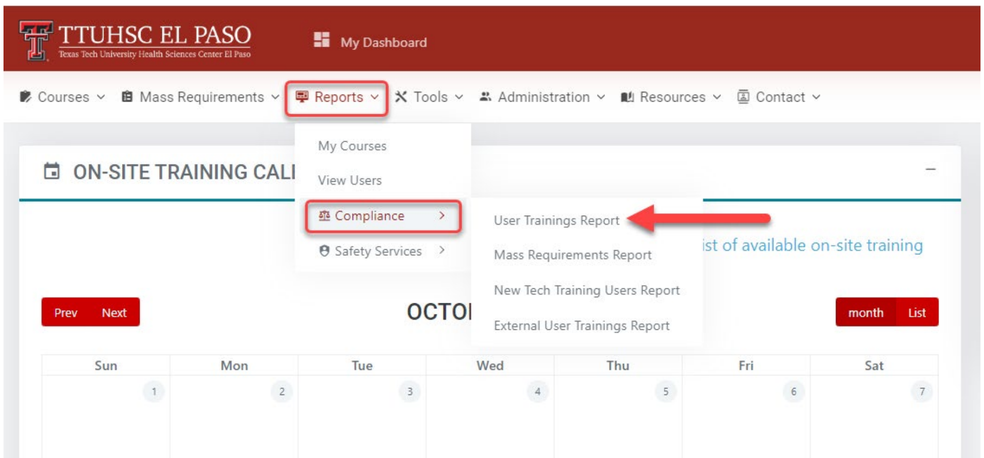
b) After you have clicked **Yes**, a pop-up notification will appear to confirm. You can go back to the **View User Report** to make sure the user was unlocked.



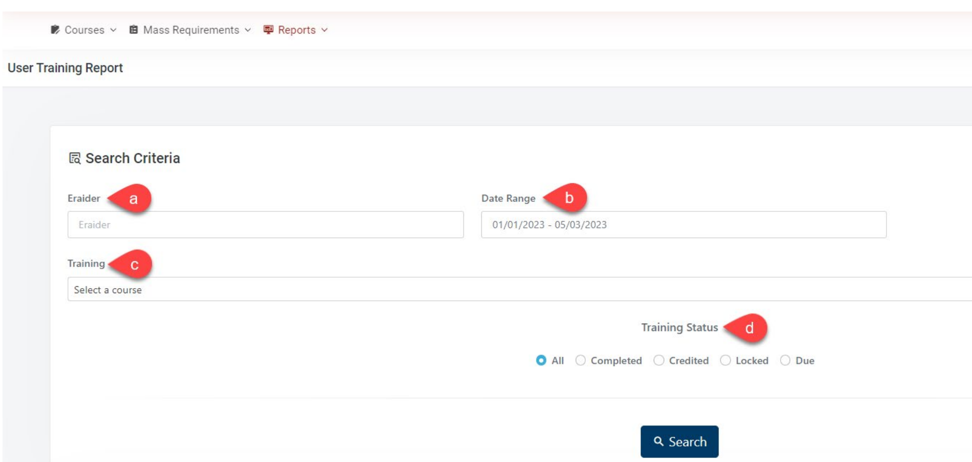
REPORTS – COMPLIANCE USER TRAININGS REPORT

The **User Training Report** will yield training completion information for all active users in Tech Training. The report includes the following fields: id, training, r number, eRaider, full name, email, termination date, start date, due date, course active, completed, credited, locked, attempts, grade, completed date, department, college, and position.

1) To pull a **User Training Report**, click on the **Reports** dropdown → **Compliance** → then click on **User Trainings Report**. You will see the following screen:

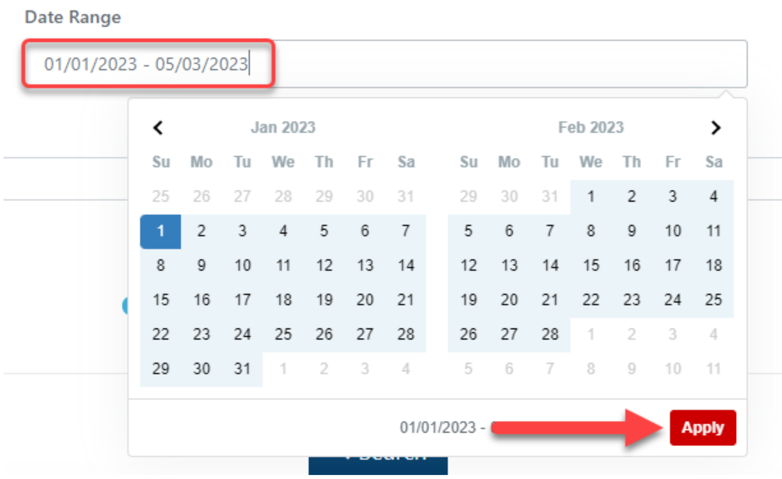


2) You will be redirected to the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

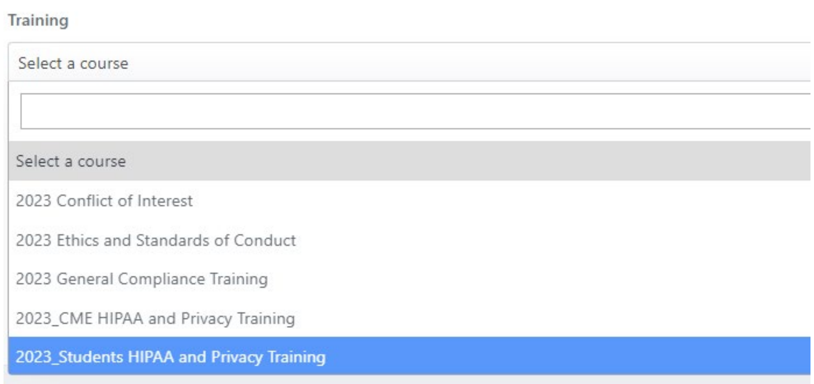


a) **eRaider** – Enter the **individual's eRaider**. If you need to pull a report for all users, leave this field blank.

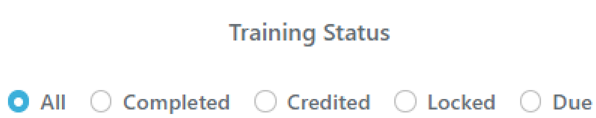
b) **Date Range** – Click on this section to select the specific **date range** you need. Once you have selected the correct dates, click on the **Apply** button.

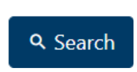


c) **Training** – Click on the **Training field** to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.



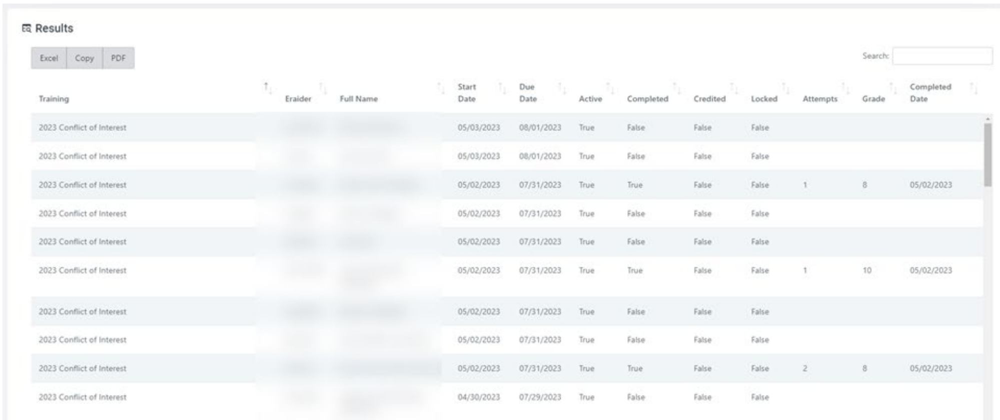
d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.



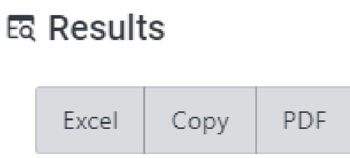
3) Once you have filled in all of the fields, click on the 

button.

4) When you click **Search**, the report will populate in the **Results** section at the bottom of the screen.



5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

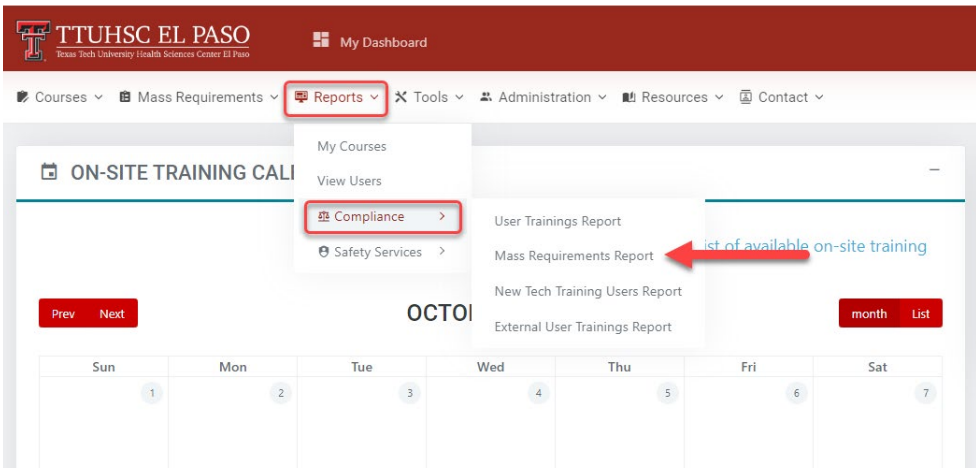


6) Once you have downloaded your report, save the **User Training Report** to your desired location.

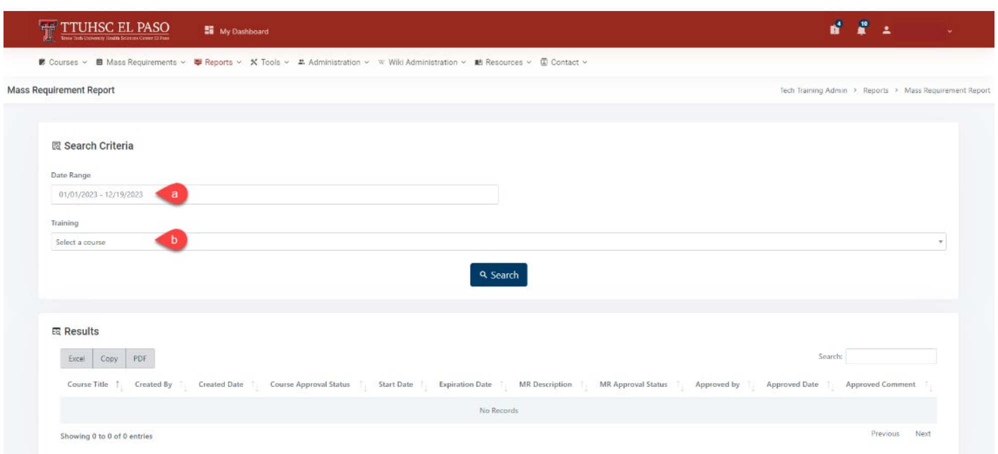
REPORTS – COMPLIANCE MASS REQUIREMENTS REPORT

The **Mass Requirements Report** will yield training course information for all courses that have been uploaded into Tech Training. The report includes the following fields: course title, created by, created date, course approval status start date, expiration date, MR description, MR approval status, approved by, approved date and approved comment.

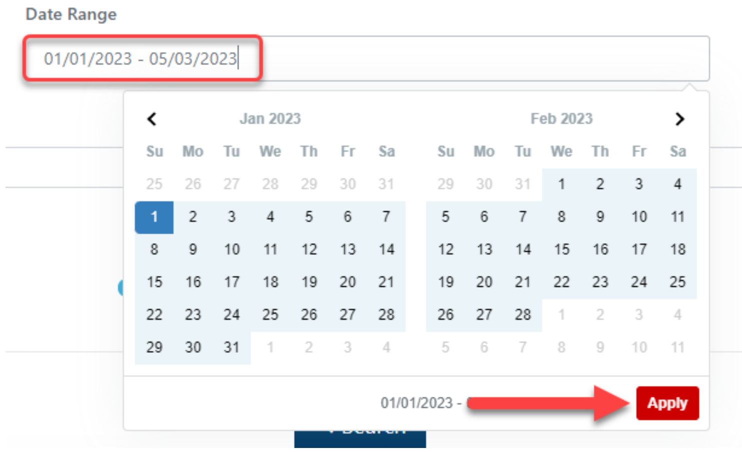
1) To pull a **Mass Requirements Report**, click on the **Reports** dropdown → **Compliance** → then click on **Mass Requirements Report**.



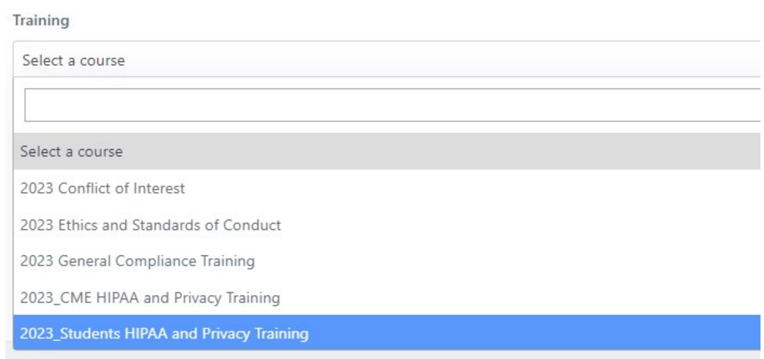
2) When you click on **Mass Requirement Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:



a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.



b) **Training -** you will need to select a course in the **Training** field dropdown. If you need to pull a report that shows all training courses, you may leave this field as **Select a course**.



3) Once you have completed all of the required fields, click on the 

button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

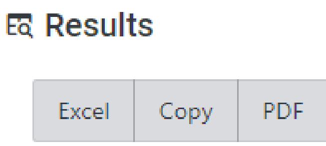
Results

Excel Copy PDF

Search:

Course Title	Created By	Created Date	Course Approval Status	Start Date	Expiration Date	MR Description	MR Approval Status	Approved by	Approved Date	Approved Comment
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	01/24/2024	for research and iRIS purpose	Approved		01/24/2023	Committee has already approved the training. Assigned training for individual is approved. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Denied		03/30/2023	Testing. Not approved. Look at your course information. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/31/2023	03/31/2024	This is for testing purposes.	Approved		04/13/2023	Testing approval yqc
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/13/2023	12/31/2023	COI training is required by policy 10.50, Regents' Rules chapter 3.1 and Texas Government Code 572	Approved		01/13/2023	Approve yearly course
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Approved		03/29/2023	Force Mass Requirement

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

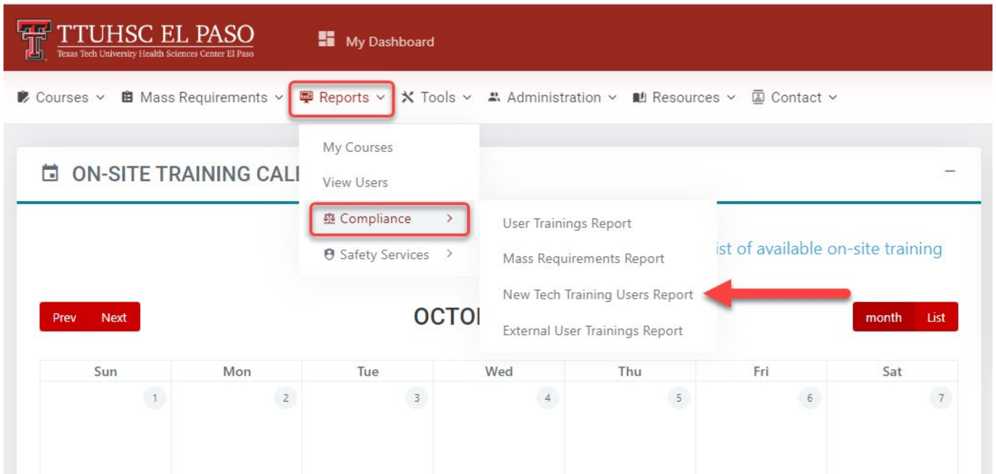


6) Once you have downloaded your report, make sure to save the **Mass Requirement Report** to your desired location.

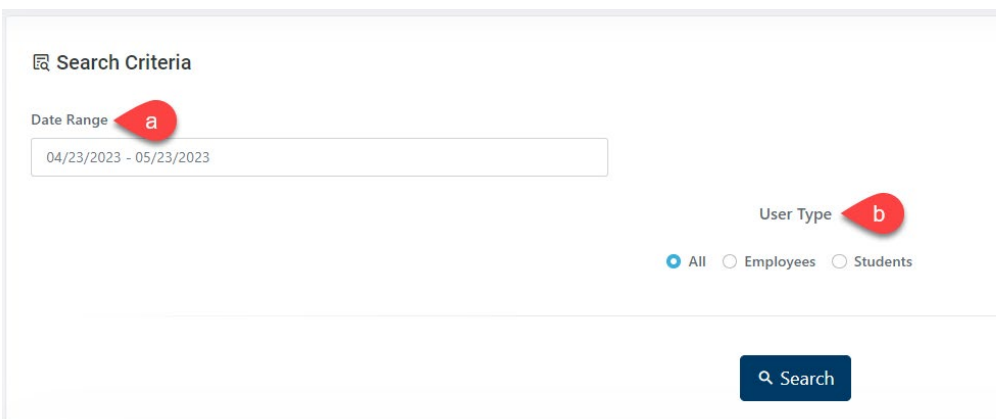
REPORTS – COMPLIANCE NEW TECH TRAINING USERS REPORT

The **New Tech Training Users Report** is utilized to verify the number of employees hired by date range.

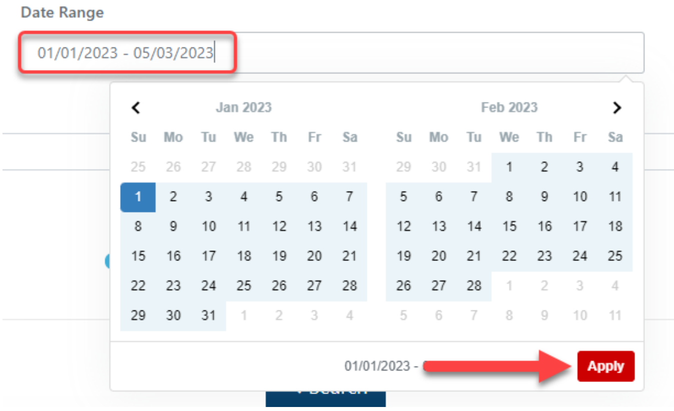
1) To pull a **New Tech Training Users Report**, click on the **Reports** dropdown → **Compliance** → then click on **New Tech Training Users Report**.



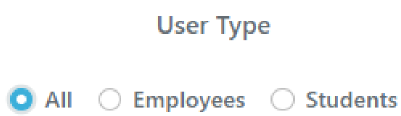
2) When you click on **New Tech Training Users Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:



a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

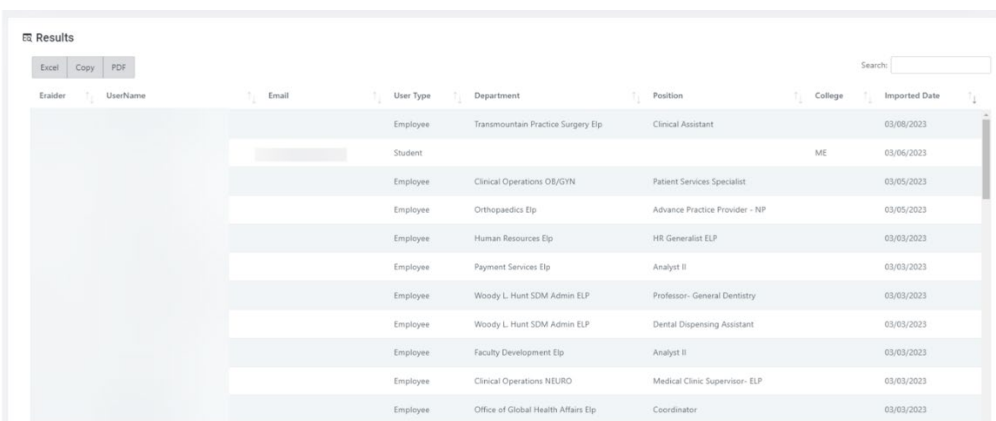


b) **User Type** – If you want to see a specific User Type, select either All, Employees or Students.



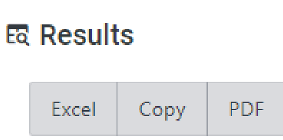
3) Once you have completed all of the required fields, click on the  button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.



Eraider	UserName	Email	User Type	Department	Position	College	Imported Date
			Employee	Transmountain Practice Surgery Elp	Clinical Assistant		03/08/2023
			Student			ME	03/06/2023
			Employee	Clinical Operations OB/GYN	Patient Services Specialist		03/05/2023
			Employee	Orthopaedics Elp	Advance Practice Provider - NP		03/05/2023
			Employee	Human Resources Elp	HR Generalist ELP		03/03/2023
			Employee	Payment Services Elp	Analyst II		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Professor- General Dentistry		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Dental Dispensing Assistant		03/03/2023
			Employee	Faculty Development Elp	Analyst II		03/03/2023
			Employee	Clinical Operations NEURO	Medical Clinic Supervisor- ELP		03/03/2023
			Employee	Office of Global Health Affairs Elp	Coordinator		03/03/2023

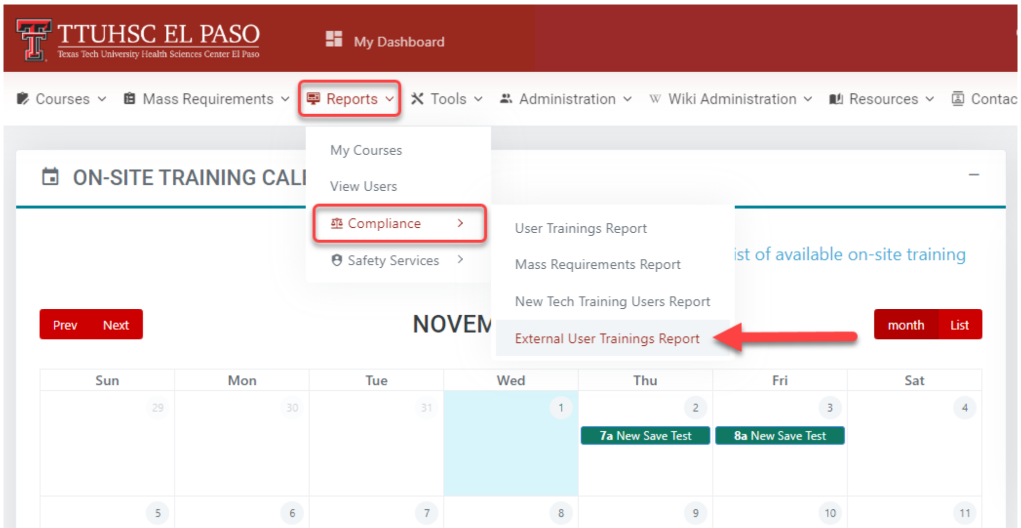
5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.



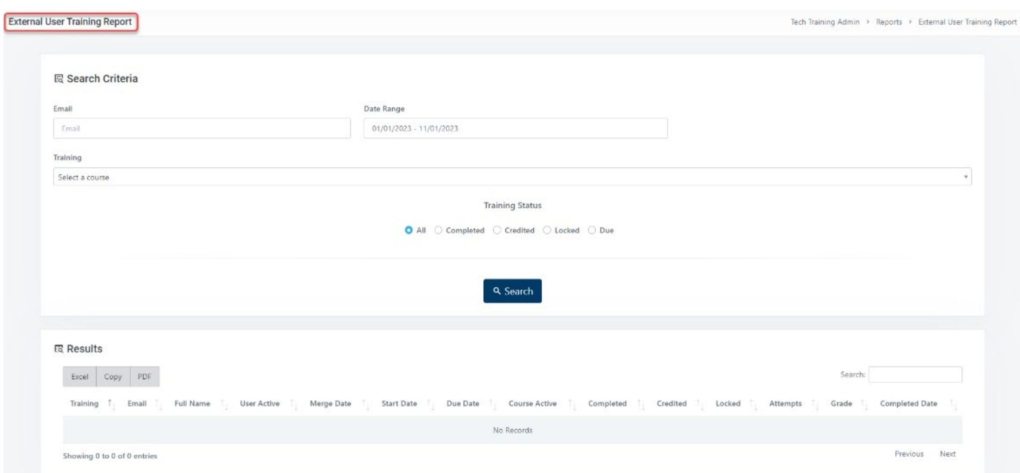
REPORTS – COMPLIANCE EXTERNAL USER TRAININGS REPORT

The External User Trainings Report will show the user the training information for the External Users.

1) To download the External Users Training Report, go to the **Reports** tab at the top of the page → **Compliance** and click on **External User Trainings Report.**



2) This will take you to the **External User Training Report** page.



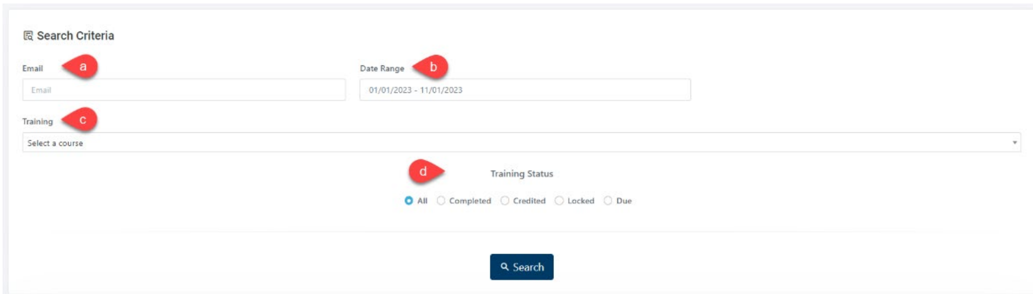
3) In the **Search Criteria** section, fill out the following fields:

   a) **Email** – Enter the **individual's personal email**. If you need to pull a report for all users, leave this field blank.

   b) **Date Range** – Select the desired date range.

c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course.**

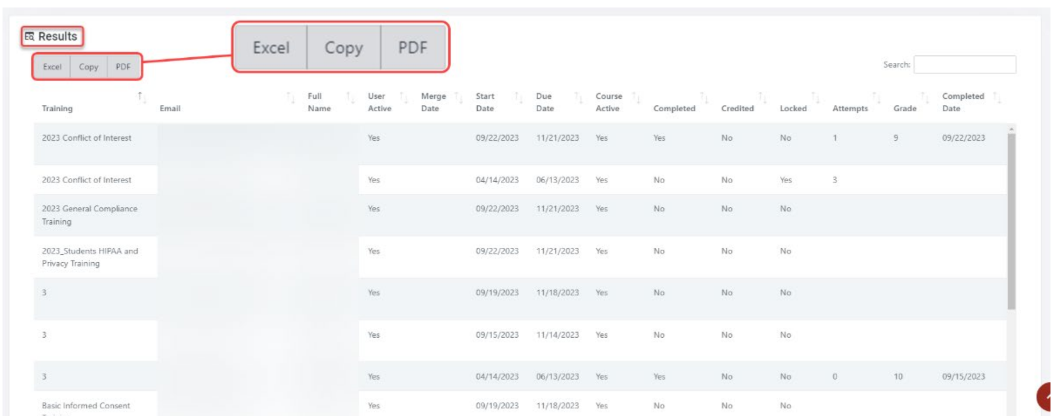
d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.



4) After you have filled out all the fields, click on the 

button.

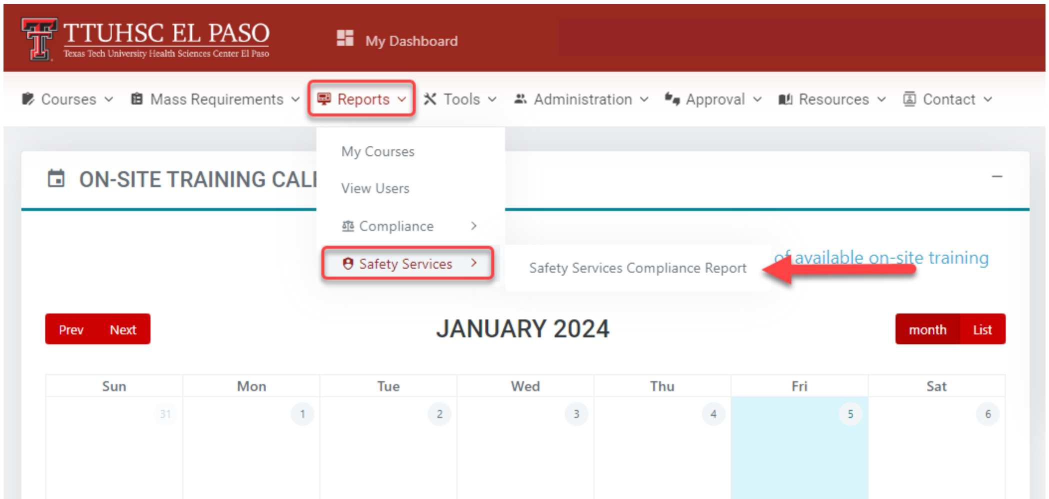
5) The **Results** section will populate with all the External User Trainings information. Click on the **Excel**, **PDF** or **Copy** option to download or save the report.



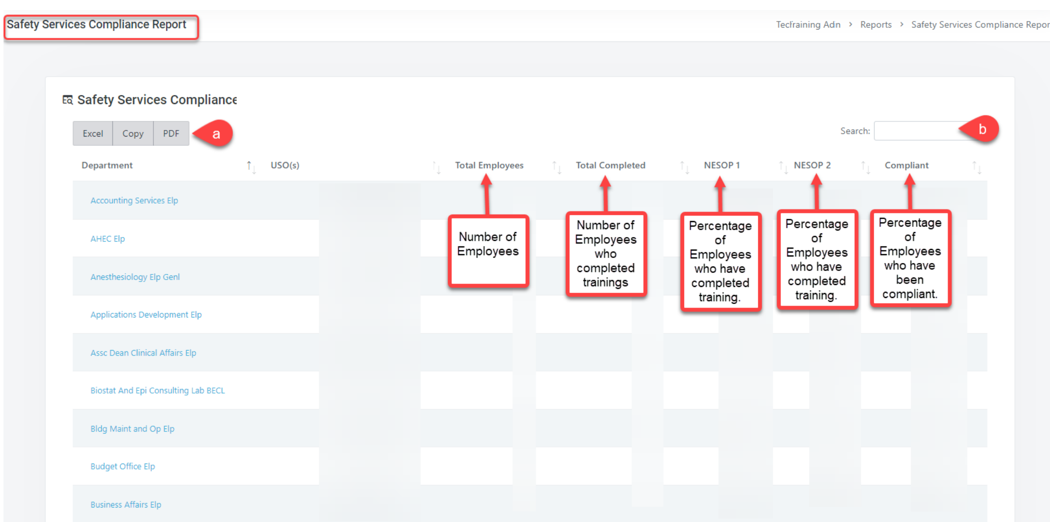
REPORTS – SAFETY SERVICES COMPLIANCE REPORT

For more information on Safety Services content, please contact the Safety Services department at safetyserviceselp@ttuhsc.edu or call 915-215-4823.

1) Go to the **Reports dropdown,** click **Safety Services** and go to **Safety Services Compliance Report.**



2) Next, you will see the **Safety Services Compliance Report** screen.



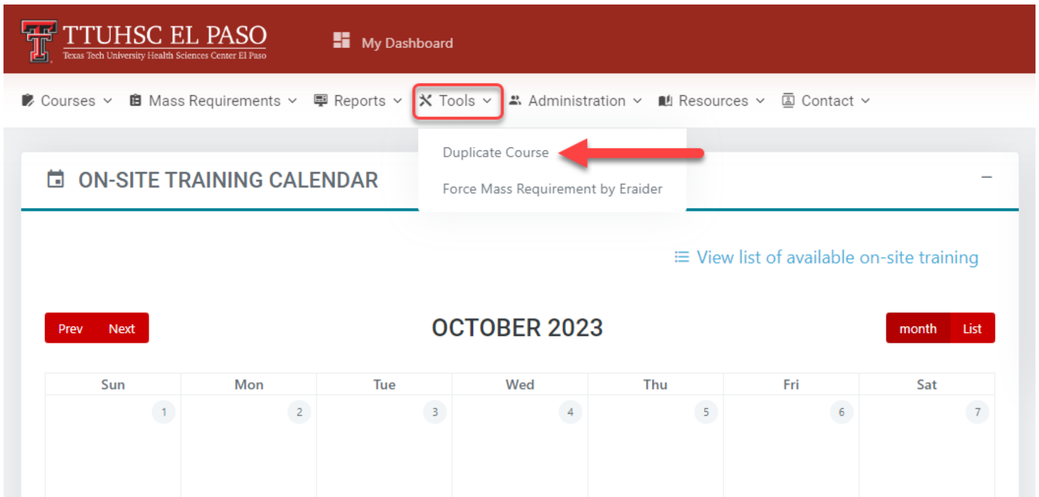
a) In this section, you will have the option to export the document into **Excel** or **PDF** or **Copy** the document.

b) You have the **Search** bar where you can look up a department by its name.

TOOLS – DUPLICATE COURSE

The Duplicate Couse feature assists in creating a course by replicating a previous approved course. The user will not need to recreate it; however, the course will require committee approval once submitted.

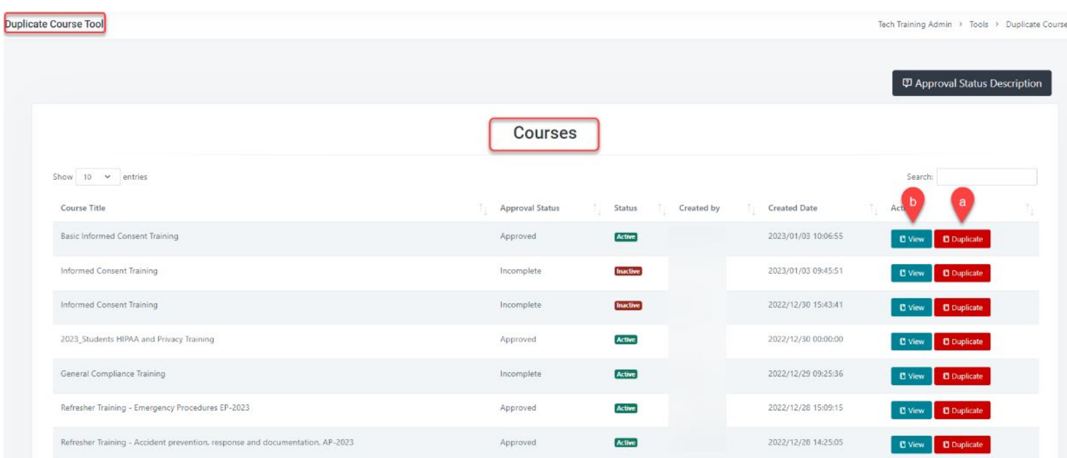
1) Go to **Tools** dropdown at the top of the page and click **Duplicate Course.**



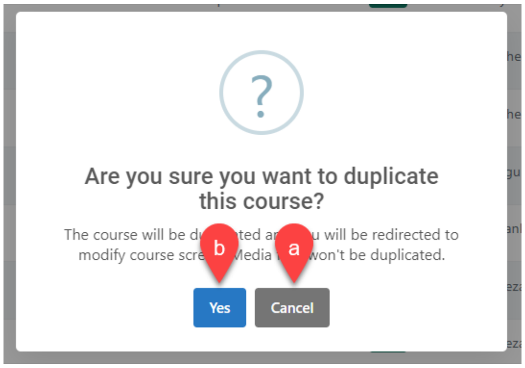
2) This will take you to the **Duplicate Course Tool** screen. A list of **Courses** will appear.

   a) Look for the training you want to duplicate and click on **Duplicate**.

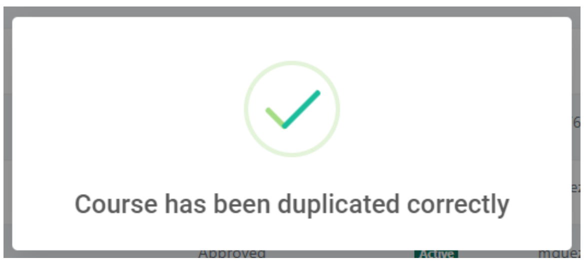
   b) You can click on **View** to see the details of the course.



3) Next, the following pop-up box will appear:

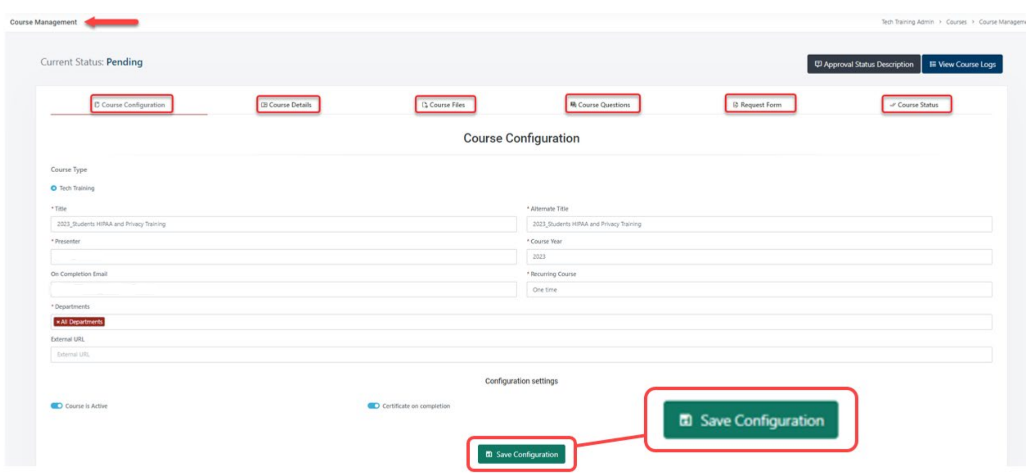


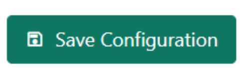
a) To go back to the **Duplicate Course Tool** screen click **Cancel**.
b) If you want to proceed click **Yes**. You will see the following pop-up notification:



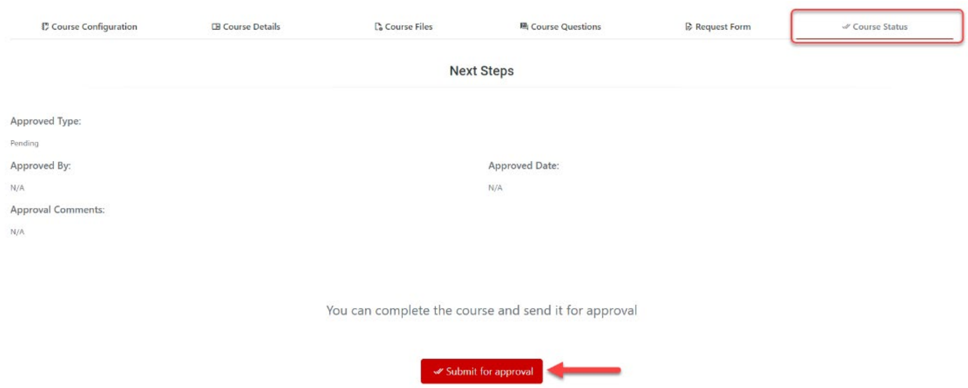
4) Next, you will see the **Course Management** screen. Follow the steps under the Create a Course section**, steps 1-26.**

5) Start making the changes for the duplicate course. You can click on the **tabs** to continue.



Note: Do not forget to click on the  *button after completing each section.*

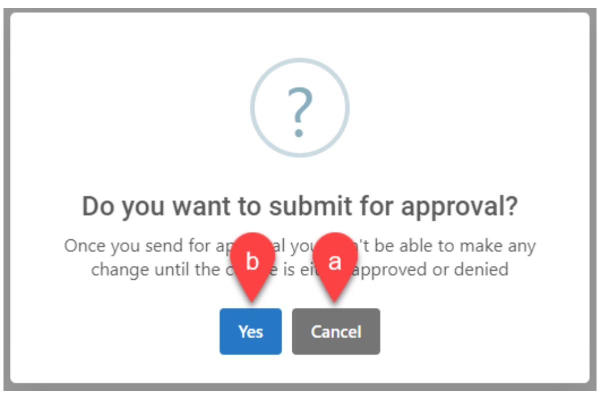
6) Once you are at the **Course Status** tab and you have finished making changes, click on the **Submit for approval** button.



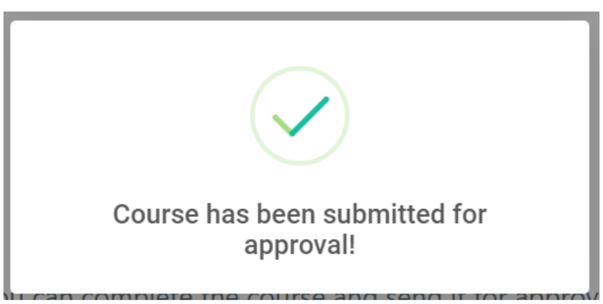
7) A pop-up box will appear.

a) Click **Cancel** if you want to stay on the **Course Management** screen.

b) Click **Yes** if you are ready to submit for approval.



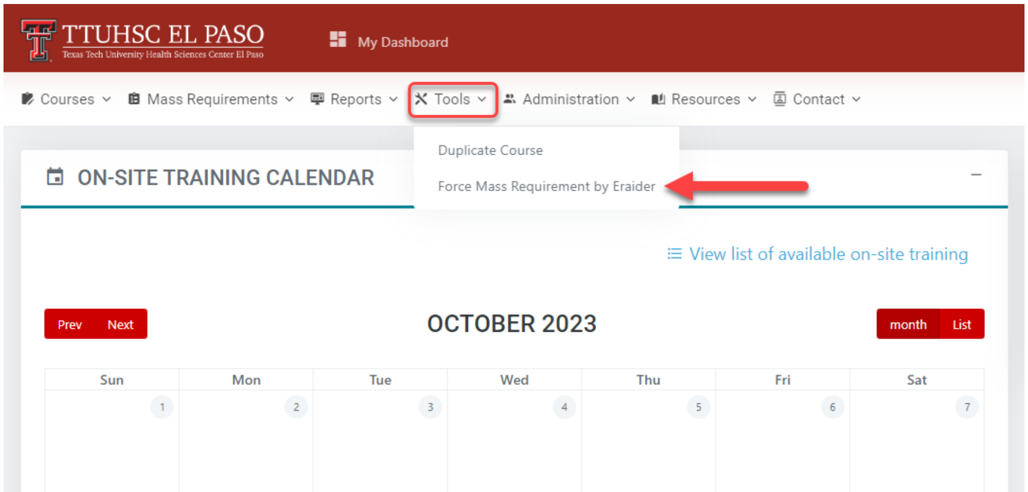
8) A pop-up box will appear confirming that the course was submitted for approval.



TOOLS – FORCE MASS REQUIREMENT BY ERAIDER

1) Go to the **Tools dropdown** and click **Force Mass Requirement by eRaider.**

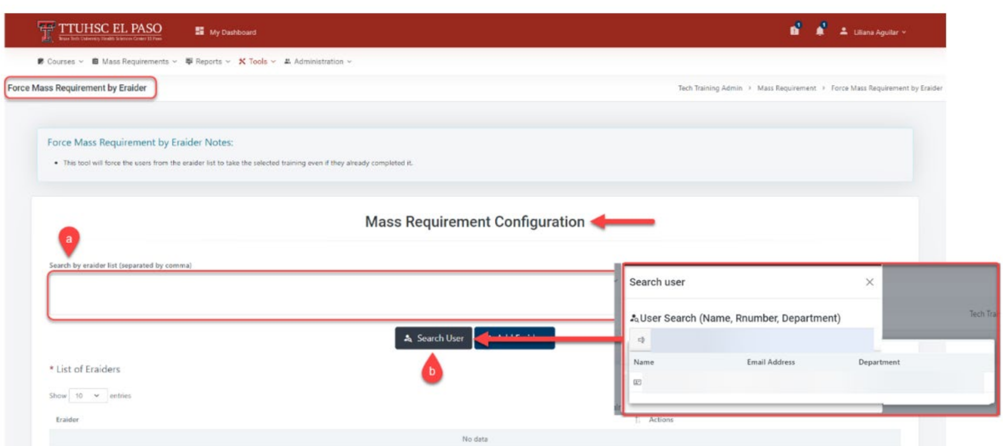
   Note: This feature will assign/reassign the training course to the users selected even if the user has already completed the training.



2) This will take you to the **Force Mass Requirement by eRaider** screen.

3) Under the **Mass Requirement Configuration** section, in the **Search by eRaider list** box, type the individual(s) eRaider(s). Then press the Add Eraiders button.

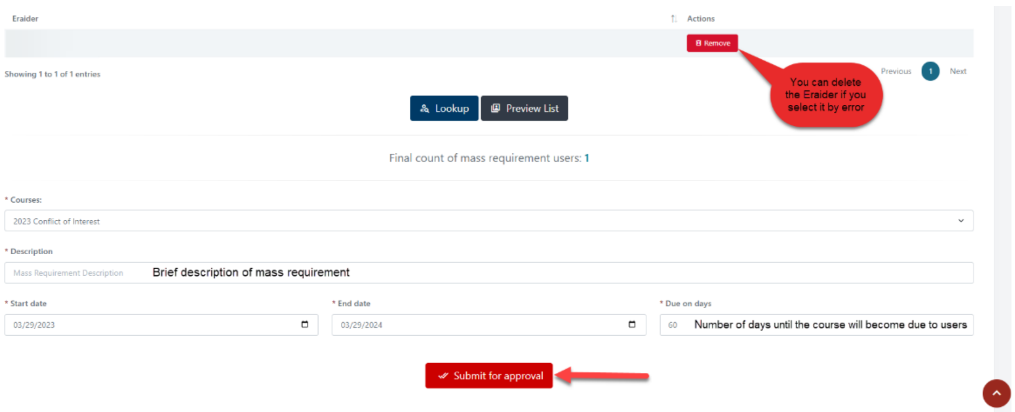
   a) If you do not know the eRaider, click on **Search User** button and type the individual(s) name(s). This field will populate a list of names. Click on the desired name(s).



4) Next, click on the 

button. This will indicate the number of individuals that will have the training assigned. It also activates the request.

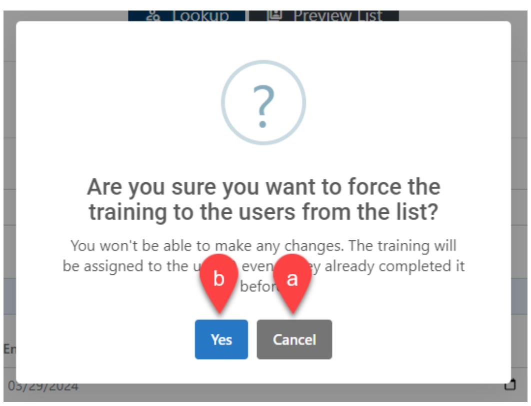
5) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Submit for approval**.



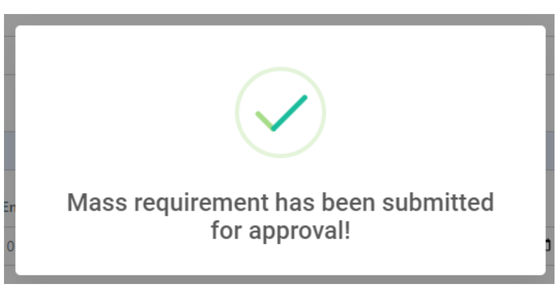
6) Next, a pop-up window will appear.

a) Click **Cancel** to stay on **Mass Requirement Configuration** section.

b) Click **Yes** to proceed.



c) When you click **Yes**, a pop-up notification will appear to confirm your submission.



ADMINISTRATION - MANAGE USERS

1) In the Tech Training application, some users will be assigned a different **User Type** depending on their department, role, and job duties:

    - **Administrator role** – the user will have full access to all of the functions. The administrator role will be the **only** one that will be able to modify the role for any user.

    - **Committee role** – user will be able to review/approve new training courses and mass requirements.

        - Only the **Administrator** and **Committee roles** can be selected together.

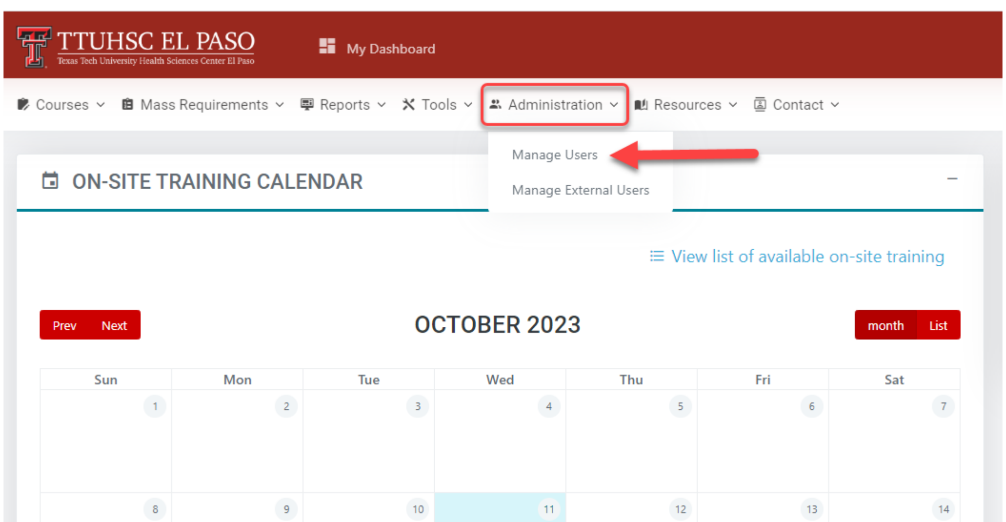
    - **Power User role** – will only let user create courses for the selected departments.

    - **Wiki Admin role** – will allow the user to create or modify wiki content for any website in Texas Tech.

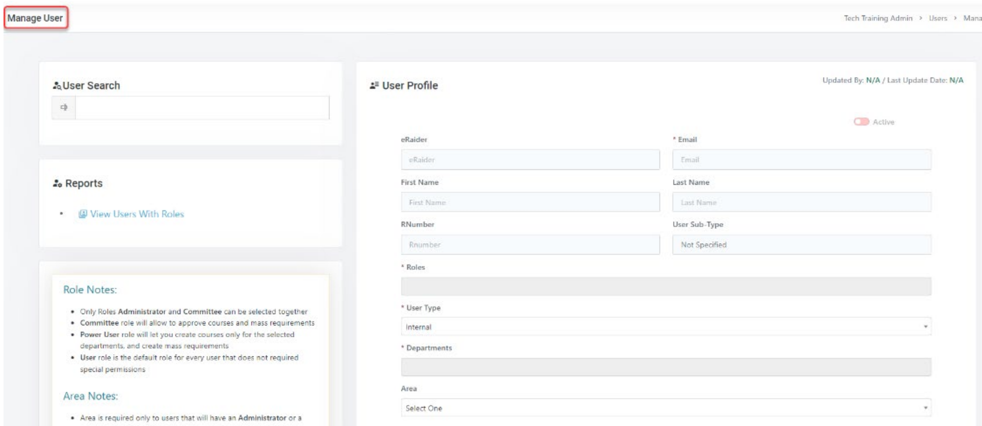
    - **User role** – is the default role for every user that does not require special permissions.

    Note: Area is required only to users that will have an Administrator or a Power User Role. Depending on the area selected some extra features will appear so be careful when assigning an area.

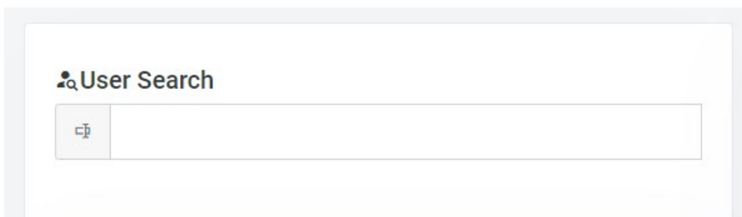
2) To manage/edit a user's role, go to **Administration dropdown** and click **Manage Users.**



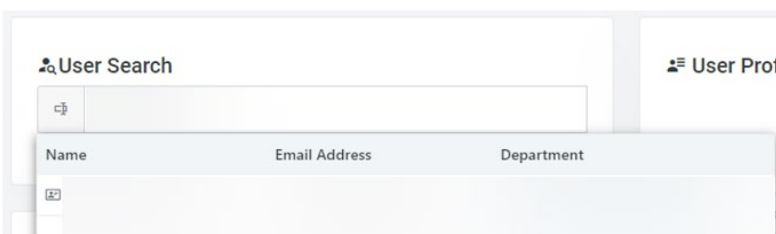
3) This will take you to the **Manage User** screen.



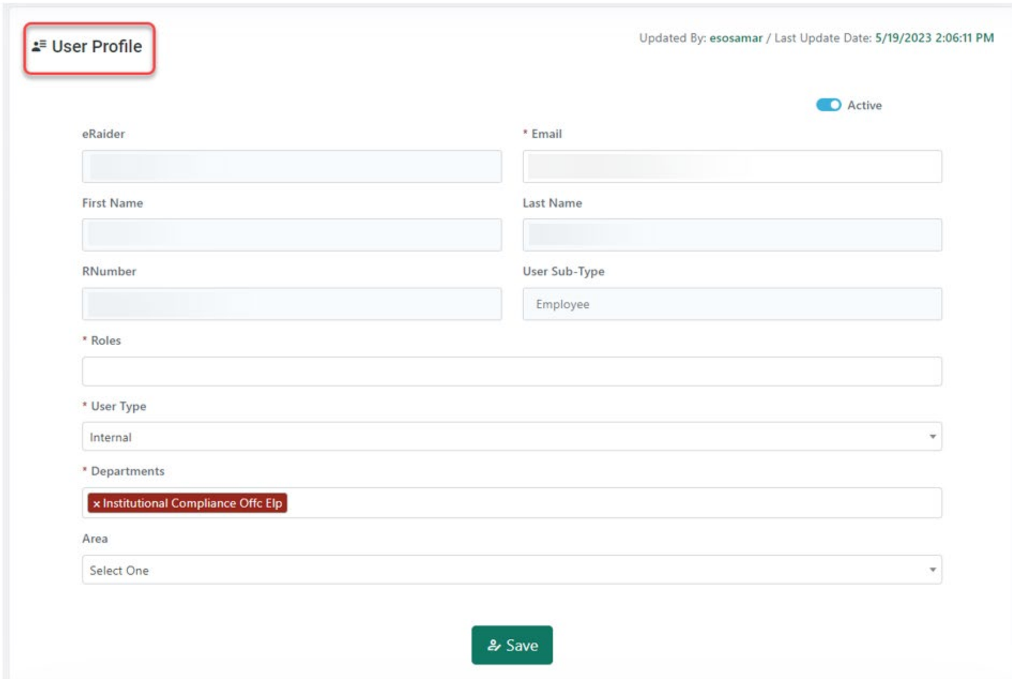
4) To search for a user, click on the **User Search** bar on the left side of the screen.



a) Next, you will need to type in the name or eRaider of the individual you are searching for. A dropdown menu will populate where you can select the individual by clicking on their name.

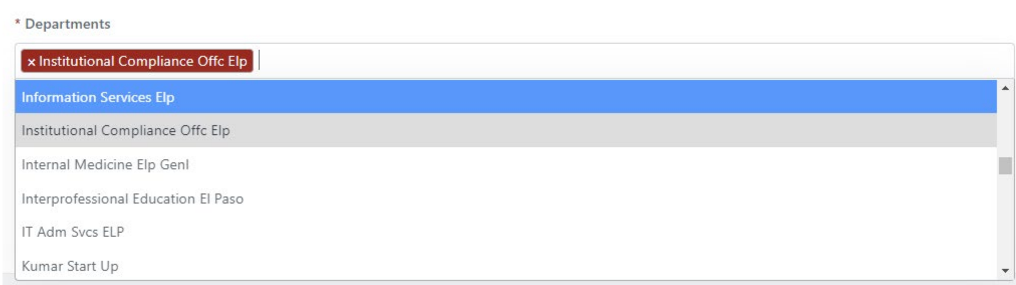


5) When you click on the individual's name, their information and role will populate on the right side in the **User Profile** section.

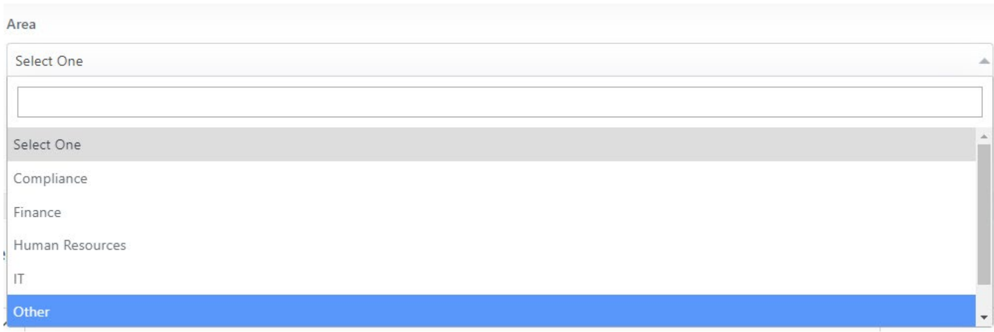


6) Click on the **Roles** section. There will be a dropdown menu of all of the available roles. To change a role for the user, click on role needed. The roles selected will appear in this section (in dark red).

7) Click on **Departments** section to change the department. There will be a dropdown menu of all available departments. Click on department needed.

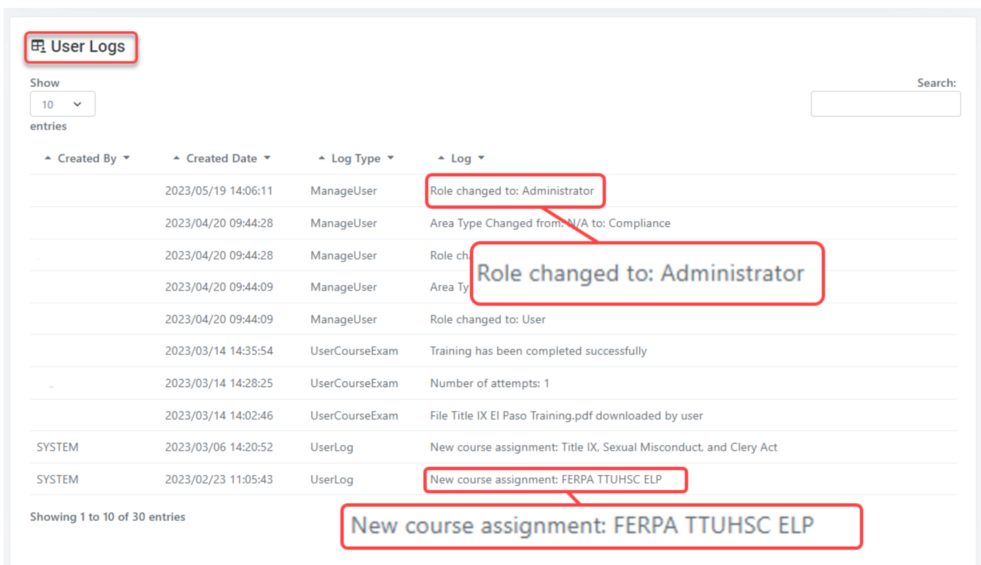


8) Click on **Area** to assign the user a specific area. A dropdown box will appear with the available options.



9) Once you have selected the new role(s), department and area that apply, click on the Save button at the bottom of the **User Profile** section.

10) Next, scroll down the page in the **User Logs** section. You will see a history of the user's roles, training that has been assigned, as well as any changes that have been made.

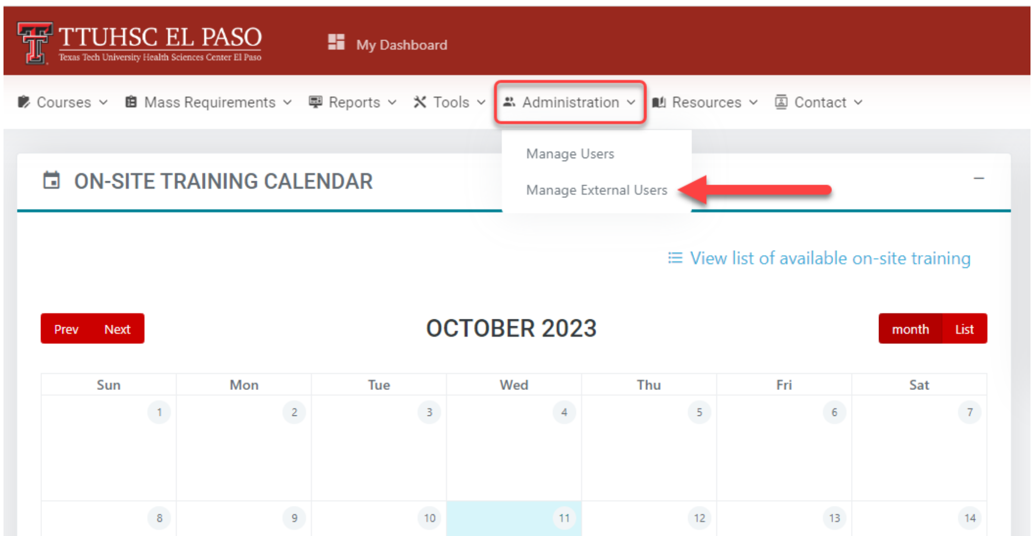


ADMINISTRATION - MANAGE EXTERNAL USERS

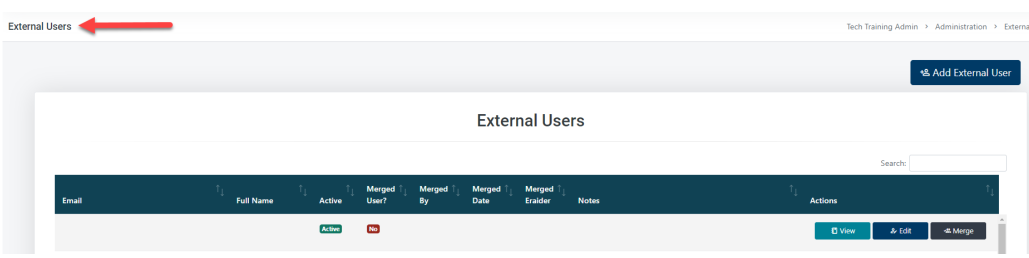
This function will allow you to add an external user (such as staffing agency employees, volunteers, or future faculty that are in the onboarding process), assign courses to the user, and merge the user with an existing TTUHSC EP eRaider account.

Note: The person creating the profile will need to be provided with detailed user information (user full name, personal email, department and trainings that need to be assigned).

1) Go to the **Administration dropdown** and click **Manage External Users.**



2) Next, you will see the **External Users** screen.



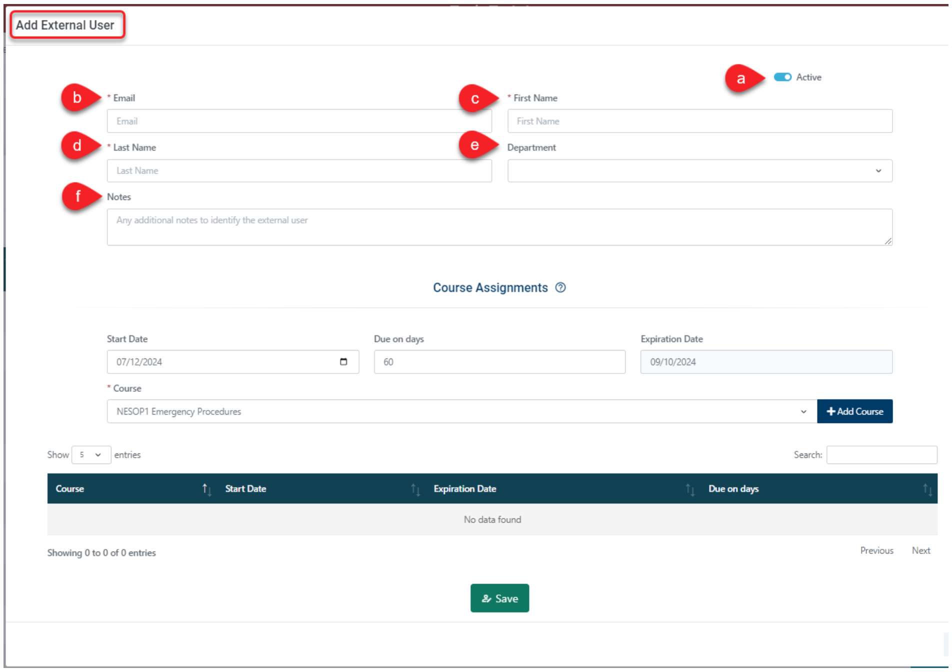
3) In the **External Users** page, you will have the following options: **Add External User**, **View**, **Edit**, or **Merge**.

4) To add an external user, click on the 

 button.

5) This will take you to the **Add External User** page. Fill out the required information fields in the section at the top of the screen.

Note: Required fields are identified by an asterisk (*).



a) **Active** – This will make the user active/inactive. Make sure the toggle button is blue.

b) **Email** – Enter the personal email that the user provided or an email the user has access to.

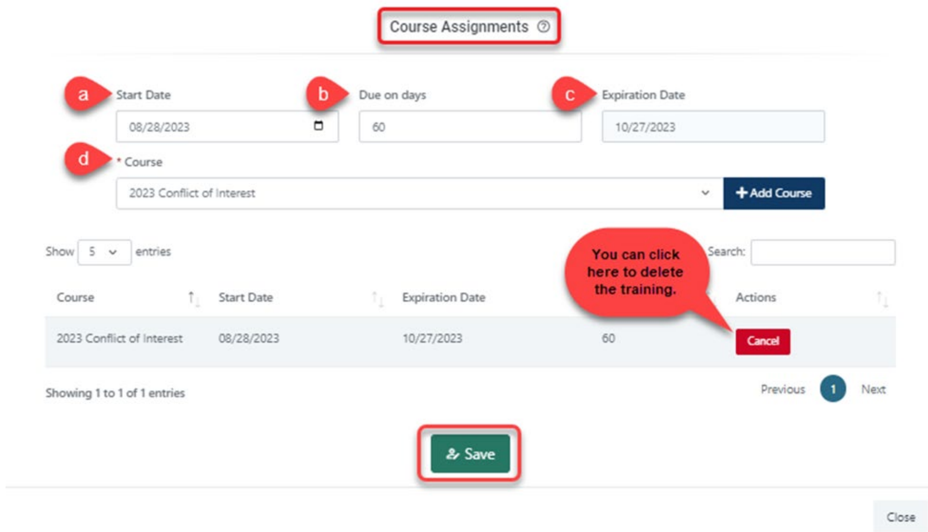
c) **First Name** – Enter the user's full first name.

d) **Last Name** – Enter the user's full last name.

e) **Department** – Scroll down in the dropdown field to select the correct department.

f) **Notes** – Enter the staffing agency or any relevant notes that pertain to this user.

6) Next, you will go to the **Course Assignments** section at the bottom of the screen. Fill out the required fields.



a) **Start Date** – Enter the date the course is being assigned.

b) **Due on days** – Enter the number of days the course will be available to the user.

c) **Expiration Date** – This date will self-populate based on the Due on days.

d) **Course** – Click on the dropdown menu and select the course you need to assign.

7) Once you have completed the required fields, click on the 

button.

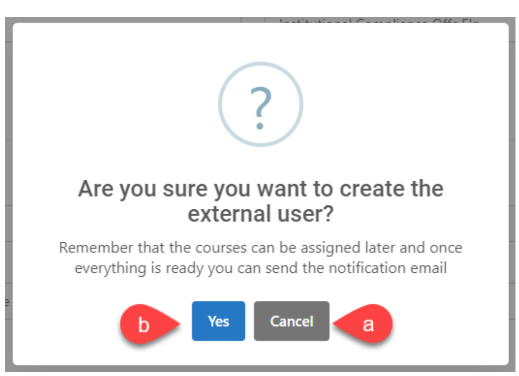
8) If multiple courses need to be assigned, follow steps #6 and #7.

9) When you have finished adding the external user's information and assigning the course(s), click **Save**.

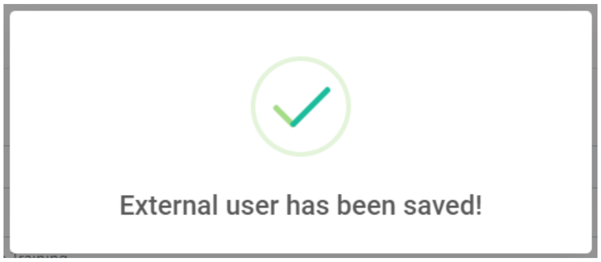
10) Once you click on the **Save** button, you will see the following pop-up notification:

a) Click **Cancel** to stay on **Add External User** screen.

b) Click **Yes** to proceed.

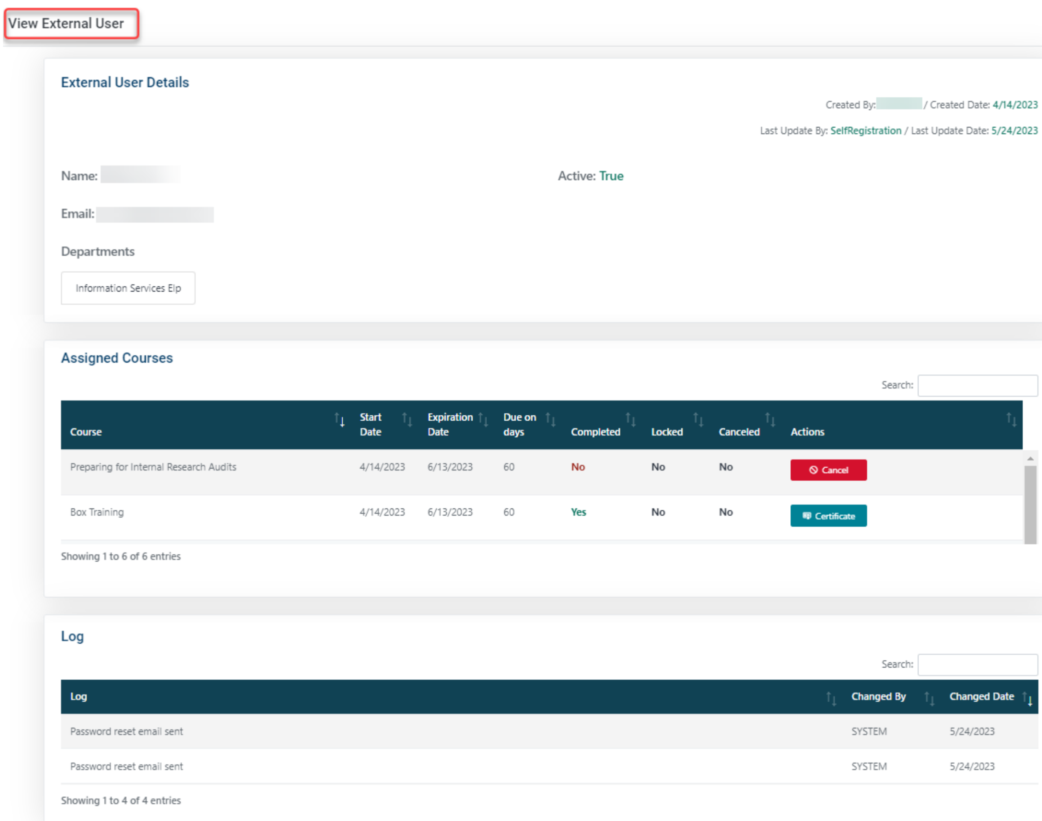


11) Once you click **Yes** you will see a pop-up notification confirming the user profile has been created and trainings assigned.

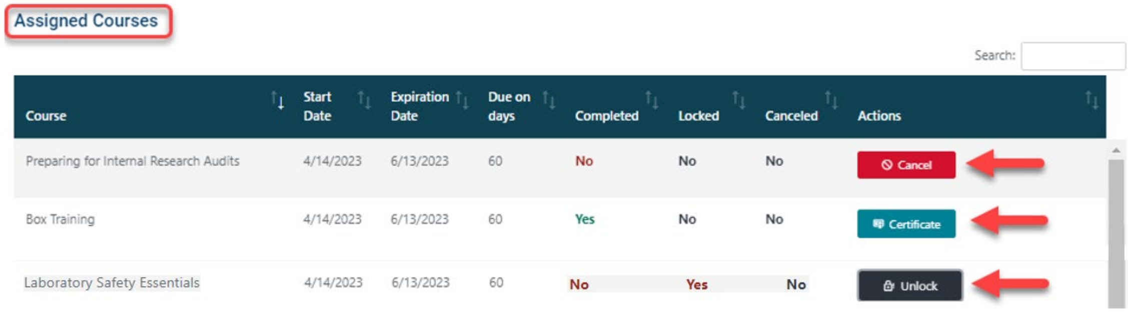


12) If you click on the 

button in the **External Users** screen, this will take you to the **View External User** screen. This screen will display the user's information as well as all courses that have been assigned to that user.

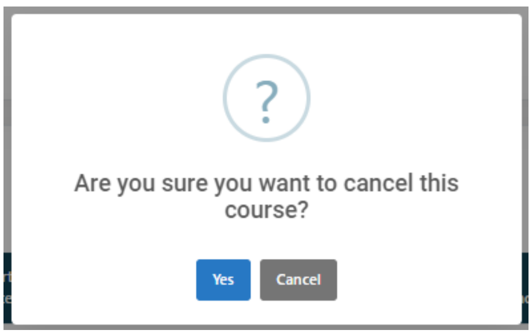


13) In the **Assigned Courses** section, you will have the option to **Cancel** a training assignment, **unlock** a training, or print a **Certificate of Completion** for the user.



14) The **Cancel** option will allow you to cancel a training for the user. Please note that the training can only be canceled if the user has not completed the course.

a) If you click on the **Cancel** button in the **Actions** column you will see the following pop-up notification:

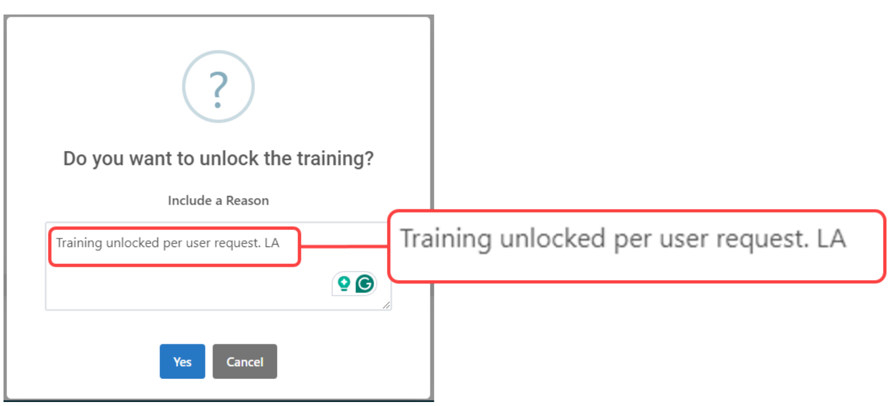


b) Click **Yes** to cancel the course, or click **Cancel** to go back to the **View External User** screen.

15) The **Unlock** option will allow you to unlock a training for the user. Please note that the training can only be unlocked if the user has used **all** the available attempts.

a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel** to go back to the **View External User** screen. Click **Yes** to proceed.

- Make sure you enter a brief note before confirming **Yes**.

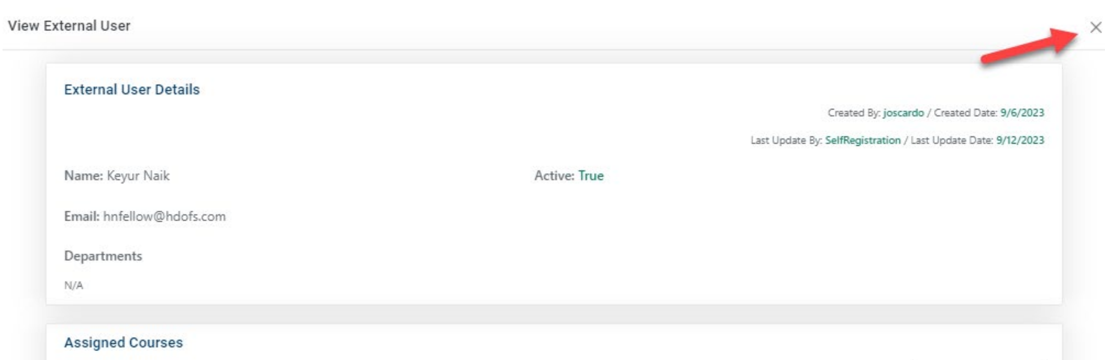


16) The **Certificate** option will allow you to print a Certificate of Completion for the user.

a) When you click on this button you will see the following screen:

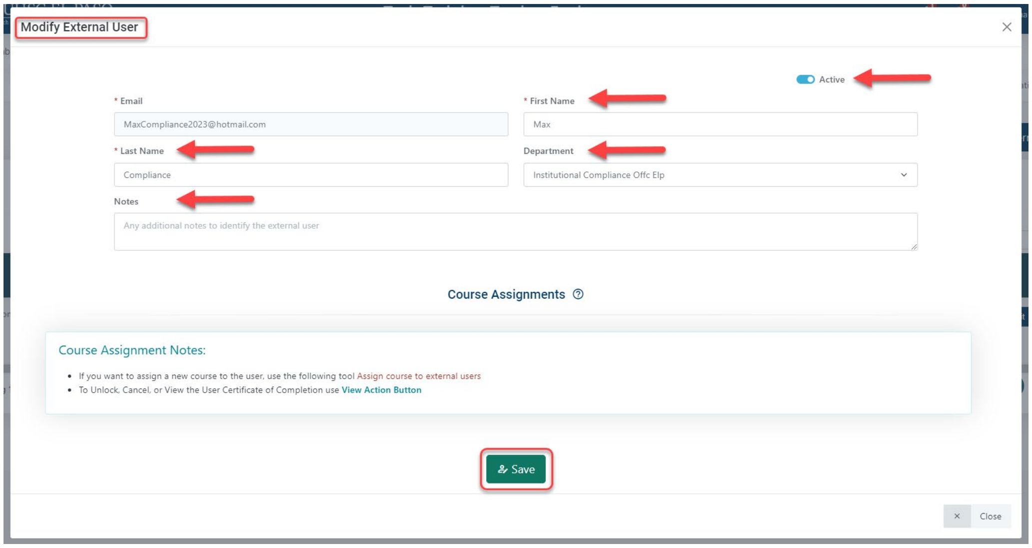
b) Click on the **Print** button at the top right side of the page to print the certificate or save it as a PDF.

17) To go back to the **External Users** screen, click on the **X** at the top right side of the page.



18) If you click on the 

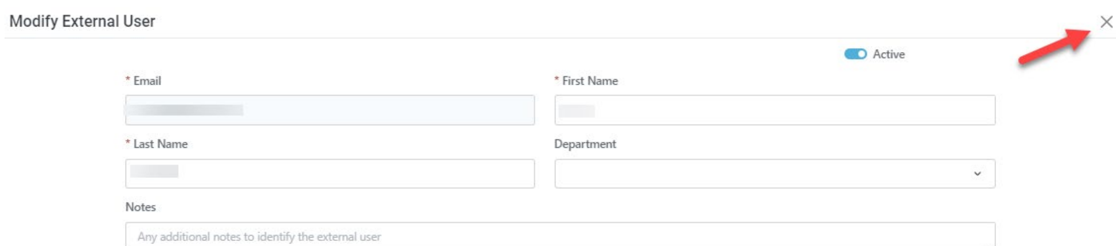
button in the **External Users** screen, this will take you to the **Modify External User** screen. In this screen, you can inactivate the user, update their name or department, or add any additional notes.

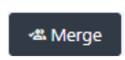


19) Once you have made all necessary edits, click on the 

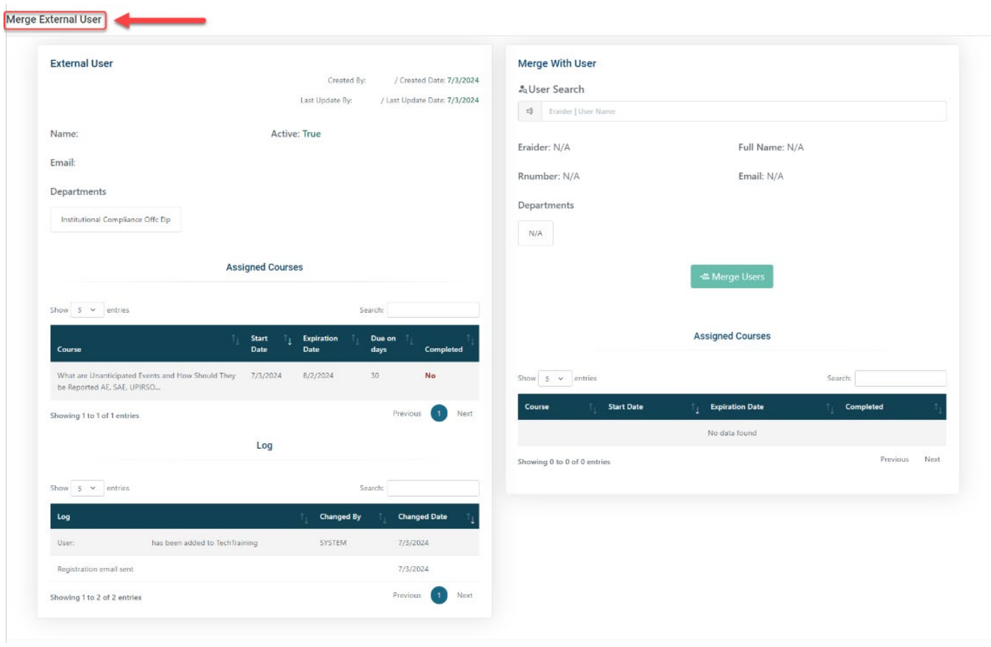
button.

20) To go back to the **External Users** screen, click on the **X** at the top right side of the page.



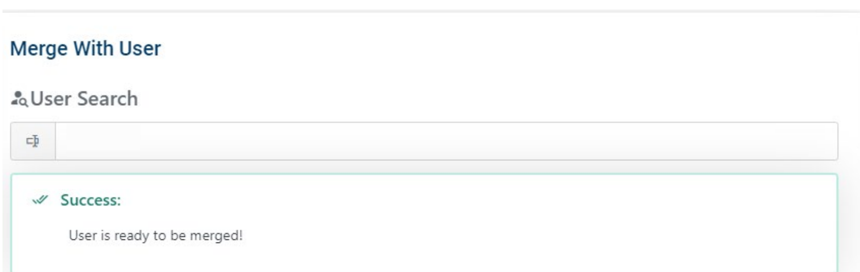
21) The person who created the external user's profile will need to monitor the external user(s) periodically to determine when to merge the external account with the new TTUHSC EP eRaider account. If you click on the 

button you will see the **Merge External User** screen.

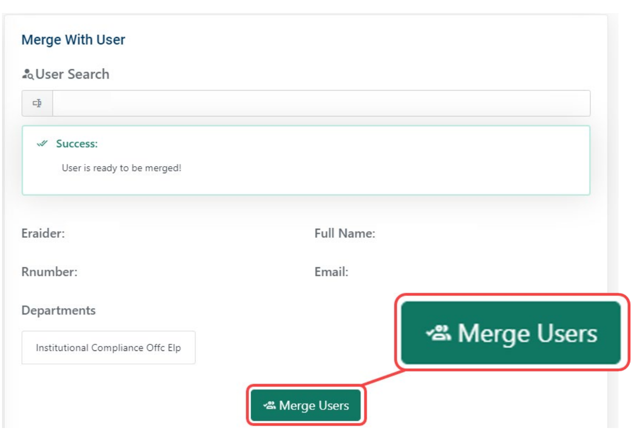


22) Click on the **User Search** box and type the user's Name/eRaider you want to merge. This will populate the user's information.

a) Once you have selected the desired user you will see the message below:



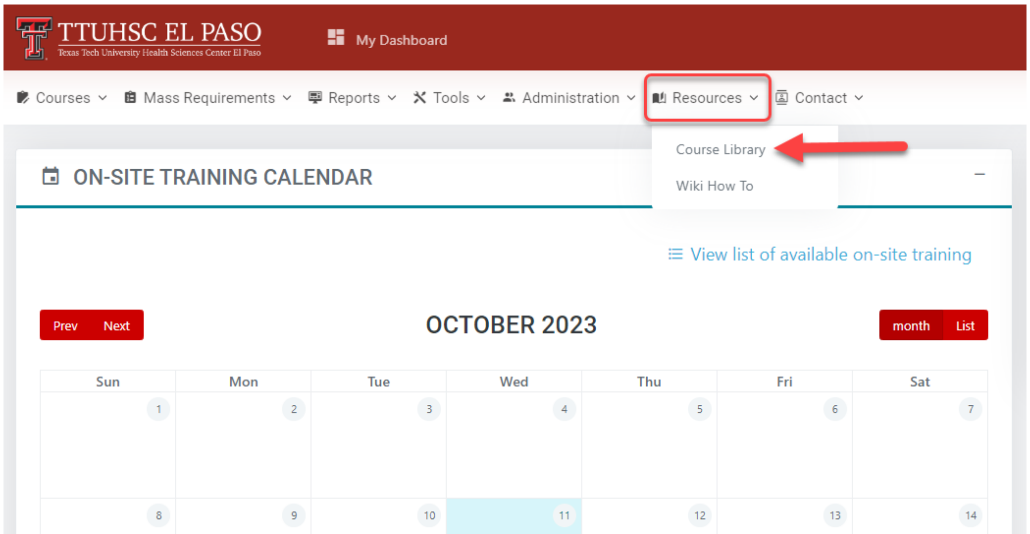
b) Click on the **Merge Users** button to merge the external user with the existing TTUHSC EP eRaider account.



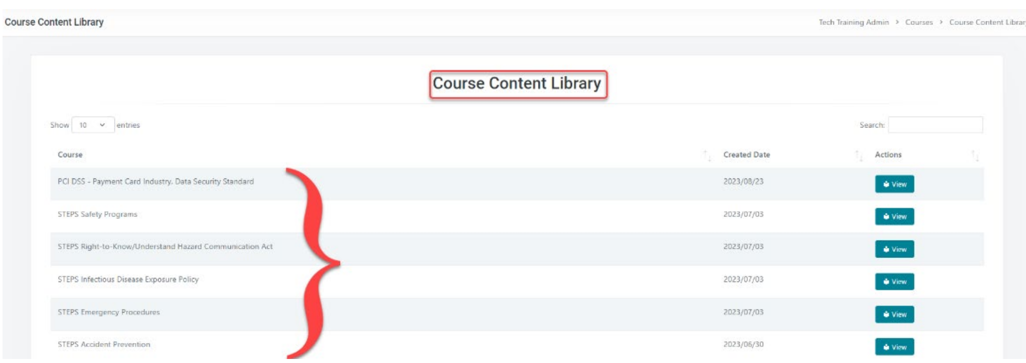
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

1) To go to the **Couse Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



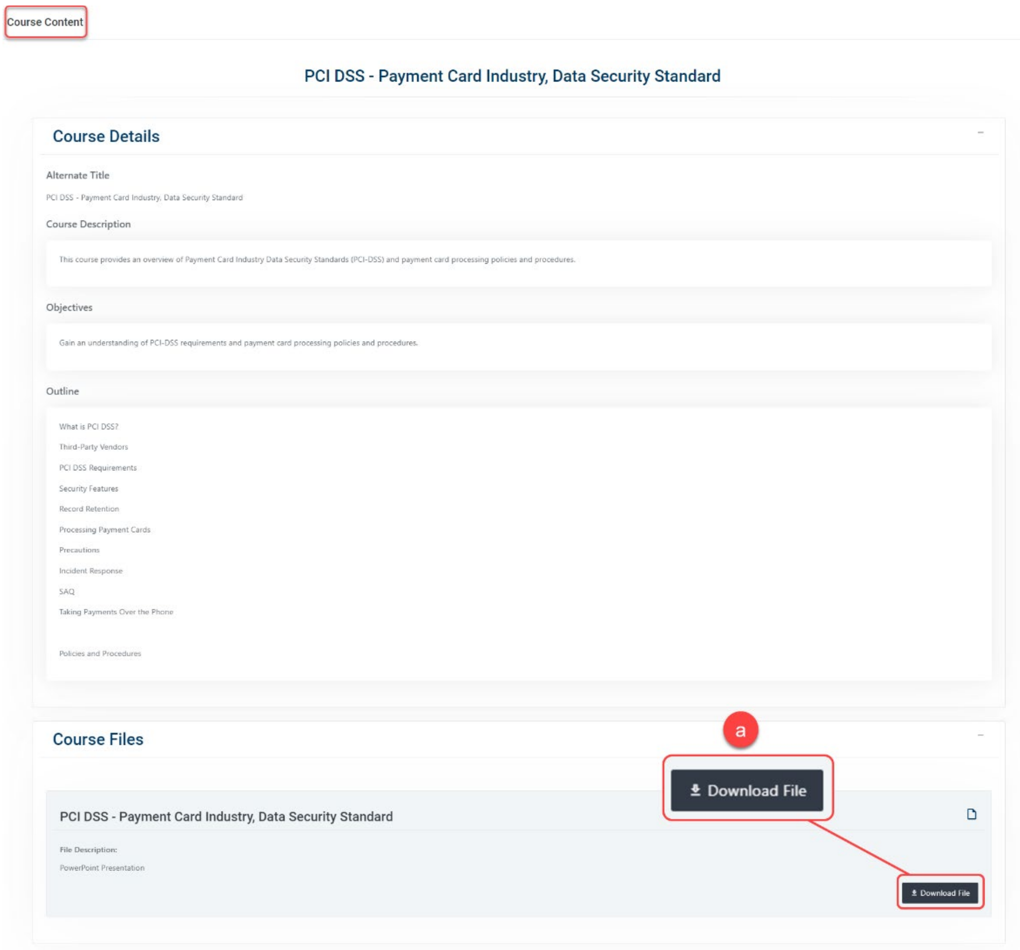
2) This will take you to the **Course Content Library** screen. In this page, you will able to see all the trainings that have been uploaded.



a) Click on the  button to view the content for your desired training(s).

3) Next, you will see the **Course Content** page which allows you to see the details for that training.

a) You can also download the **Course Files** for that course.

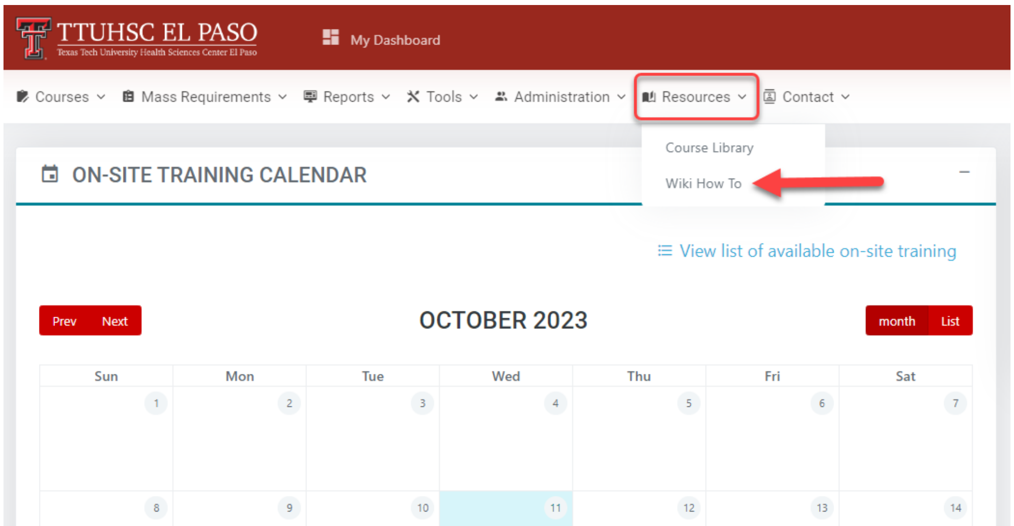

Course Content
PCI DSS - Payment Card Industry, Data Security Standard
Course Details
Alternate Title
PCI DSS - Payment Card Industry, Data Security Standard
Course Description
This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.
Objectives
Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.
Outline
What is PCI DSS?
Third-Party Vendors
PCI DSS Requirements
Security Features
Record Retention
Processing Payment Cards
Precautions
Incident Response
SAQ
Taking Payments Over the Phone
Policies and Procedures
Course Files
a
Download File
PCI DSS - Payment Card Industry, Data Security Standard
File Description:
PowerPoint Presentation
Download File

RESOURCES – WIKI HOW TO

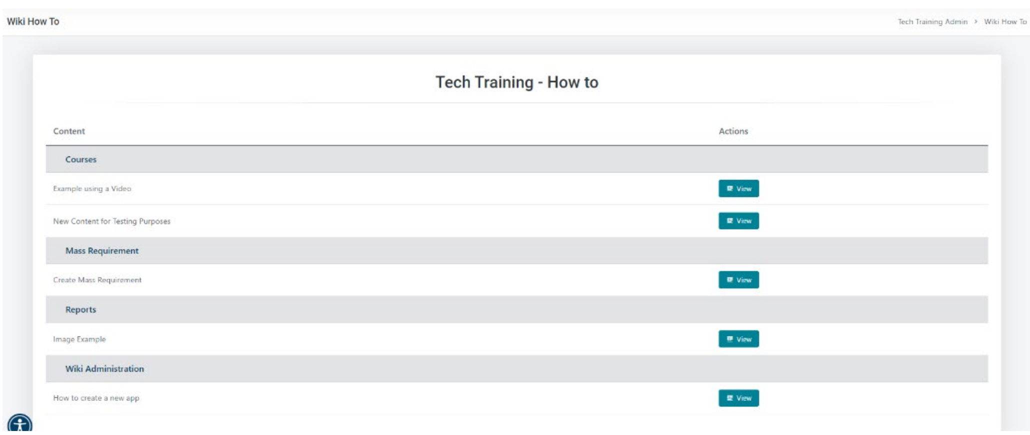
This feature will allow the user to see instructional videos, images or documents on different functions within the Tech Training application.

Note: Functions available vary depending on the user's role.

1) Go to the **Resources** dropdown at the top of the page and click on **Wiki How To**.



2) This will take you to the **Wiki How To** page. In the **Tech Training – How to** section you can see the instructional videos, documents, and images on various topics.



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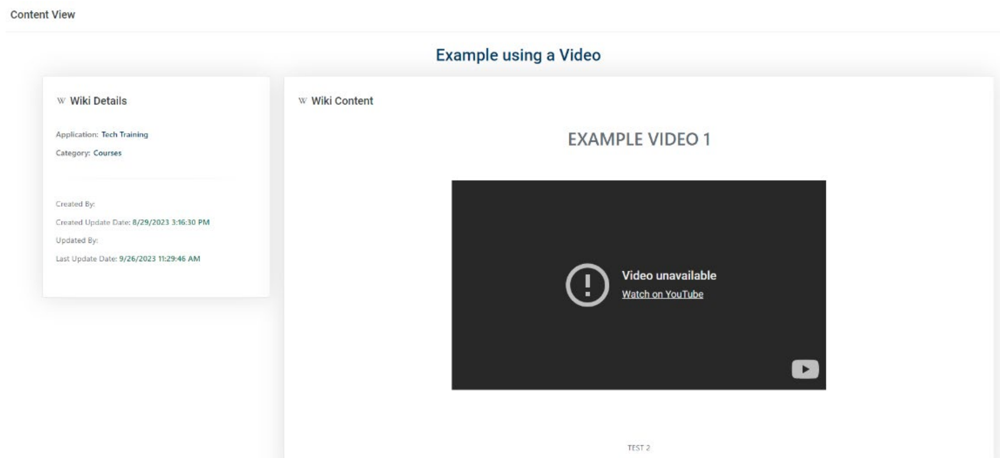
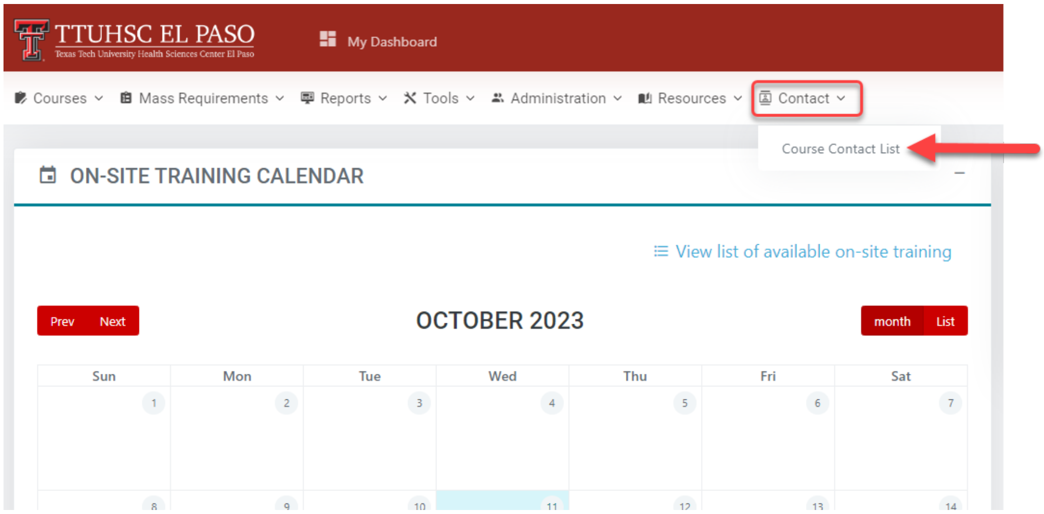
3) To see a specific section, click on the **View** button next to the name of the desired topic. This will display the content for that section.



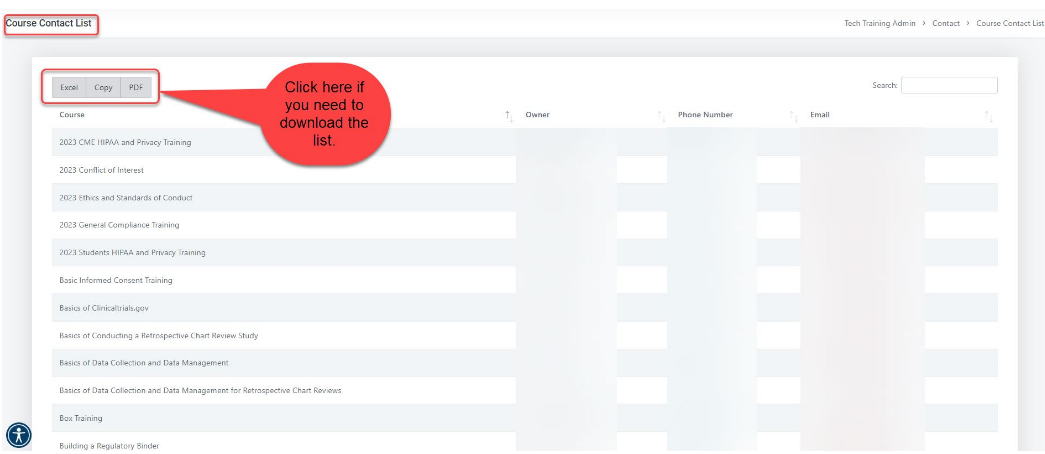
CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

1) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.

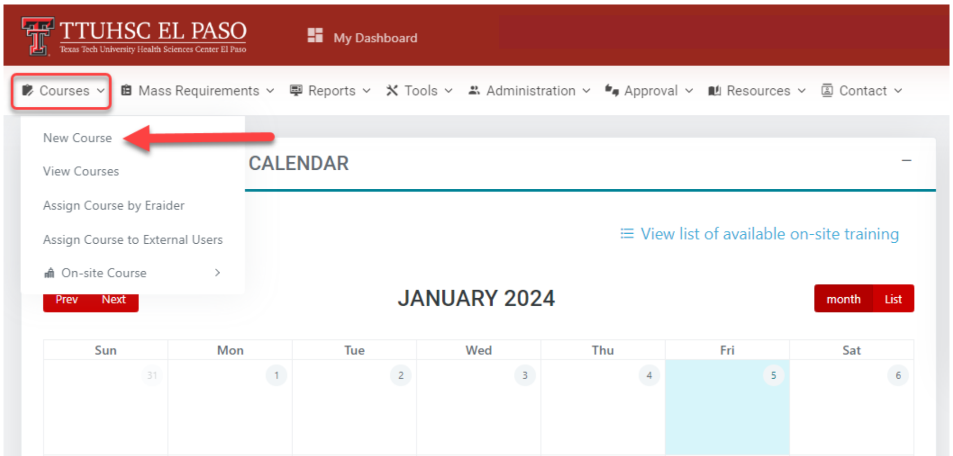


2) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number and email.



COURSES – NEW COURSE

1) To create a course, go to the **Courses** dropdown from the left-hand corner and click on **New Course**.

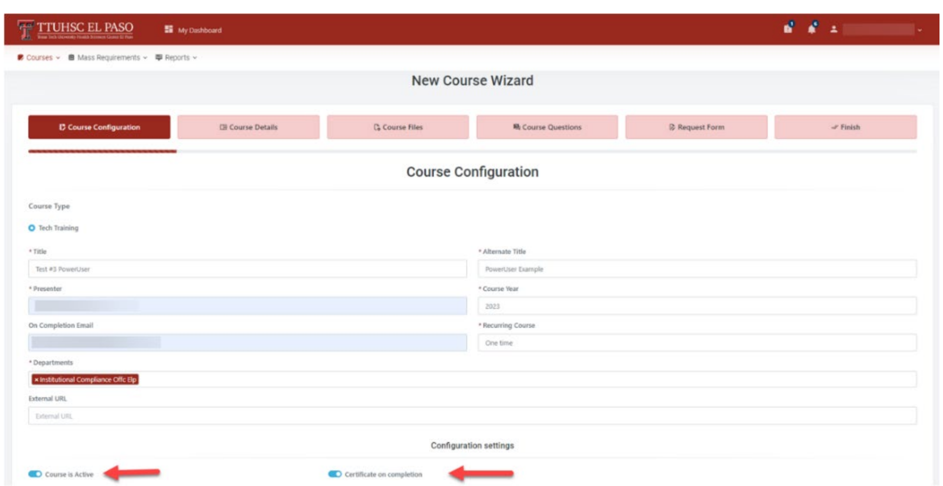


2) You will be directed to the **New Course Wizard** screen. First step is the **Course Configuration** tab.

   a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

      - Under **Departments**, you can choose all departments or choose a specific department.
      - For **External URL**, use this only if course will have an external source attached. (For example, utilizing YouTube videos or external sites outside of TTUHSC EP website.

   b) Assure the **Course is Active** and **Certificate on Completion** toggle buttons under **Configuration settings** are blue. This will make them active.



c) Once the information is completed, click on the 

button to proceed.

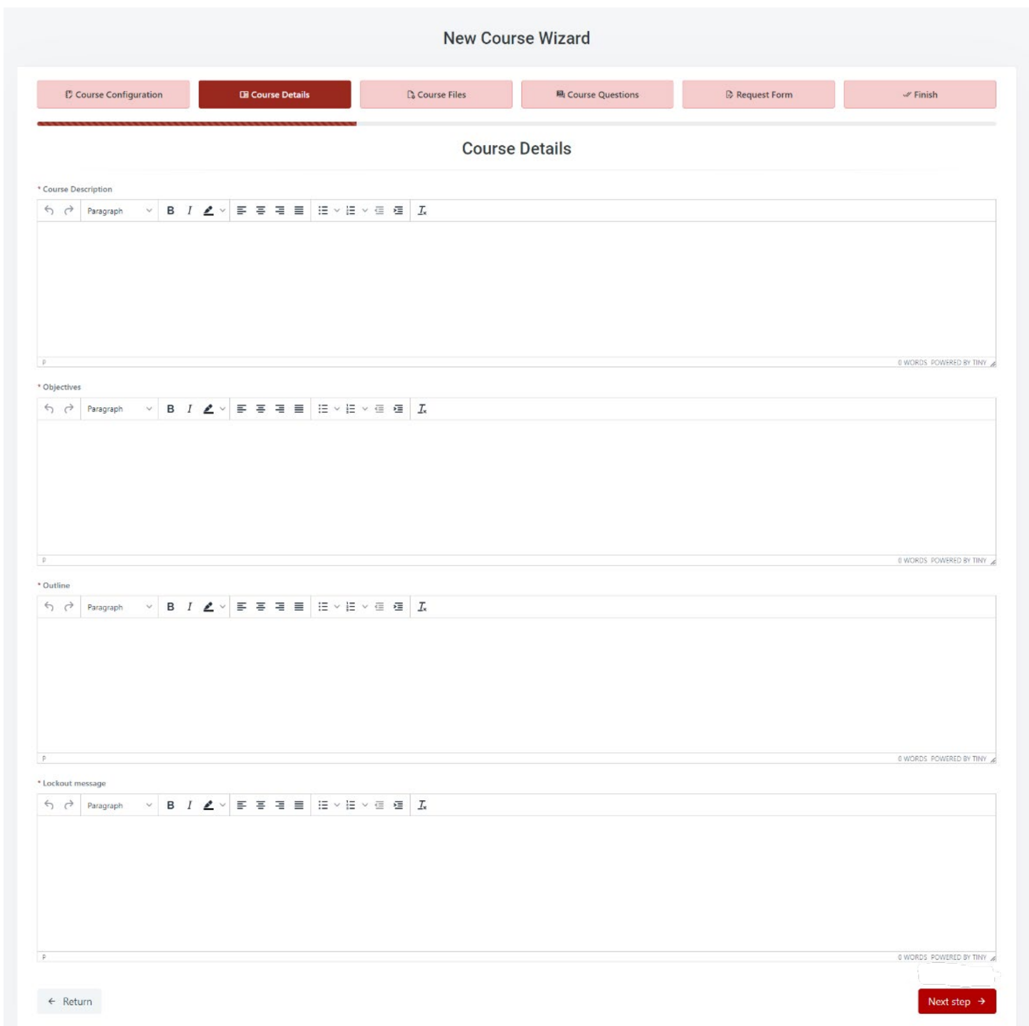
3) You will be directed to the next tab, **Course Details**. See below:

a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

b) Then click on the 

button to proceed.

- **Course Description** – enter a short description of the course.
- **Objectives** – outline the goals for the user upon the completion of this course.
- **Outline –** enter a general description of the course content and instructions.
- **Lockout Message** – enter contact information of person that can unlock the training for user.



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HEALTH SCIENCES CENTER.
EL PASO
Office *of* Institutional Compliance

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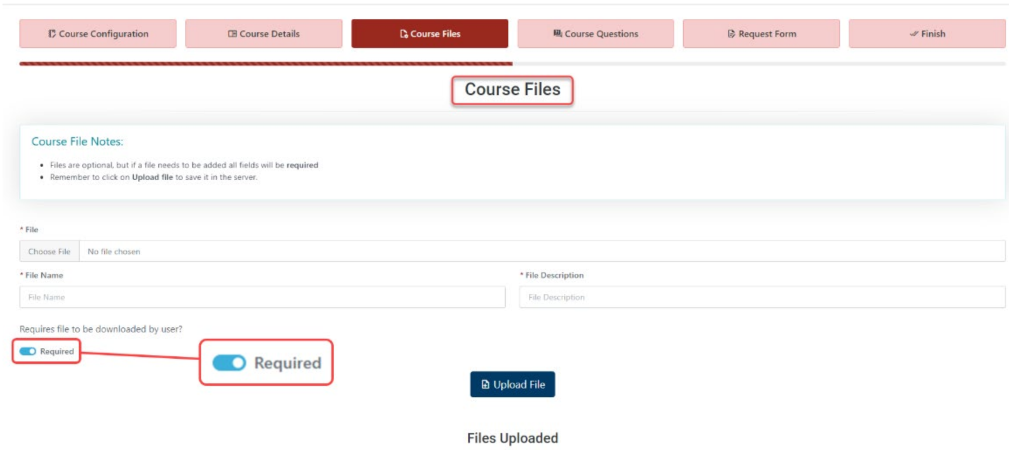
4) Under **Course Files** tab, you will be able to upload the desired files. There is no limit to the number of files you wish to upload.

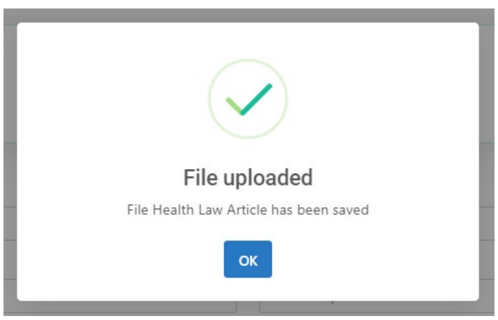
   a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

   b) Ensure the **Required** toggle button at the bottom left hand corner of the page is blue. This will make downloading the course files a requirement.



5) Once the files have been uploaded, click **Upload Files**.

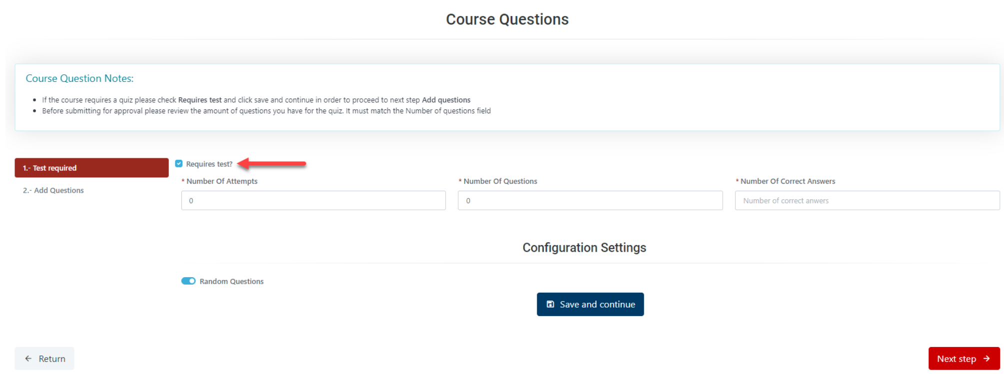
   a) A pop-up box will appear. Click **OK.**



6) You may continue uploading additional files. If you are finished, click on the 

button to proceed.

7) You will be directed to **Course Questions** tab. This is a two-step process.
   a) First, answer **1. If a test is required**, check the **Requires test?** checkbox.



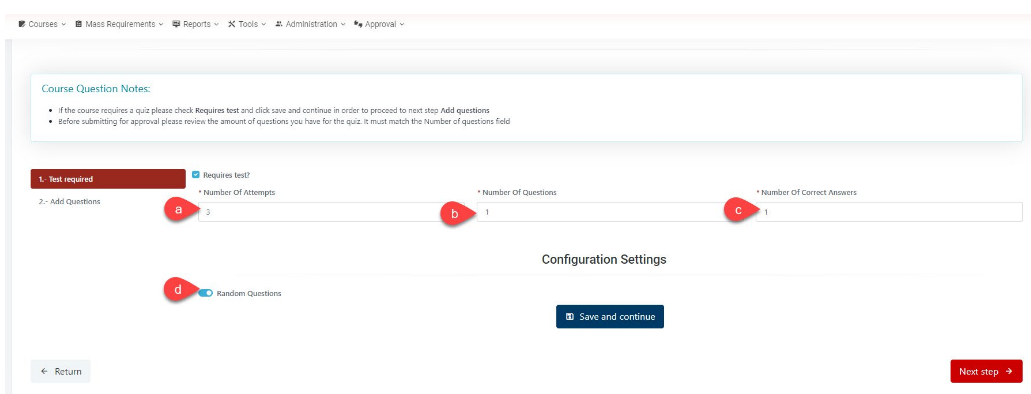
8) Next, you will need to fill in the following fields:

a) **Number of Attempts** – this field determines how many times the user is allowed to take the test before being locked out.

b) **Number of Questions** – this field will determine how many questions the user will receive each time the test is taken.

c) **Number of Correct Answers** – this field will determine the number of questions that must be answered correctly to pass the test.

d) You will have the option to choose **Random Questions**. It is recommended that you select **Random Questions** so that the user receives a new shuffled set of questions when retaking a test. If you don't choose **Random Questions**, the questions will appear in the same order each time the user initiates the test.



9) When the information has been entered in Step 1, click on **Save and continue** button at the bottom of the screen. Then click on 

.

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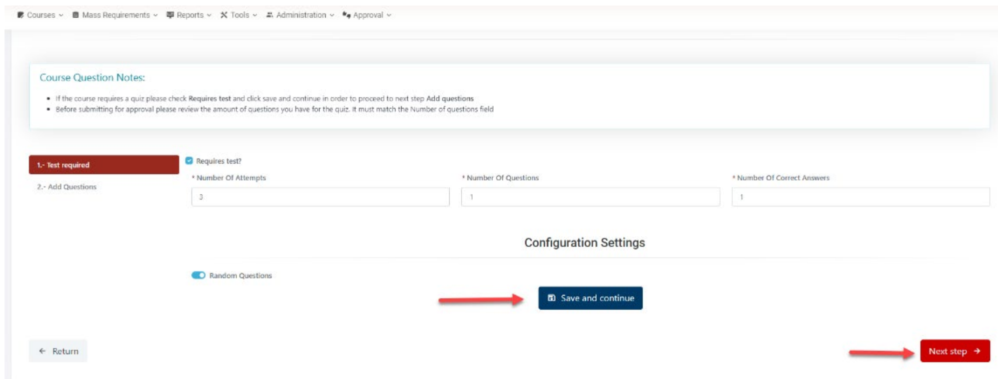
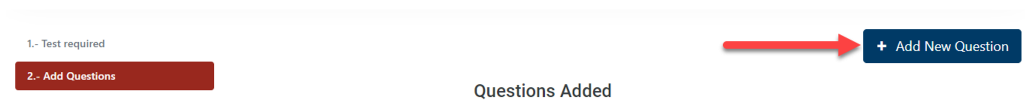


10) Next, you will be directed to the **2. - Add Questions** step.
   a) Click on **Add New Question** button to start adding questions.



11) This will take you to the section below. Fill out the 

fields.

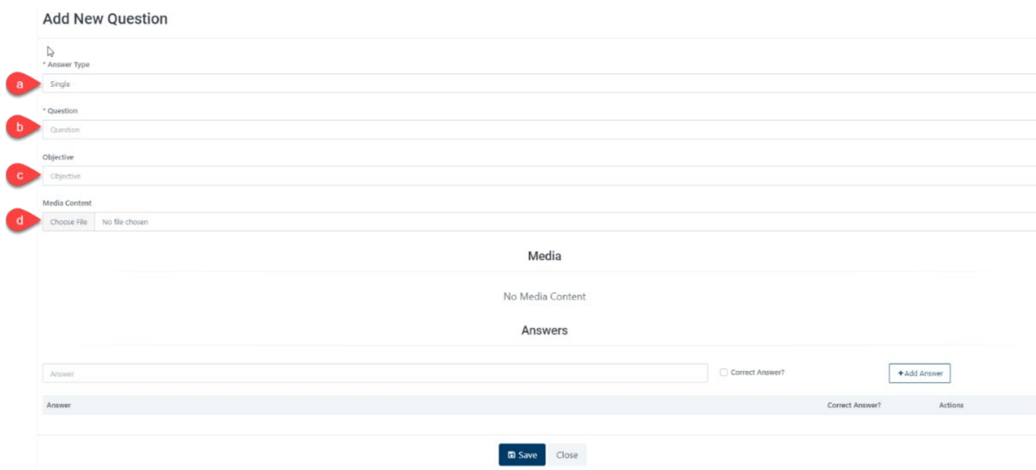
   a) **Answer Type** – There are two types of answers: single or multiple. Choose **single** if question only has one correct answer. Choose **multiple** if question has more than one correct answer.

   b) **Question** – The questions can be typed in, or you can cut and paste the questions from a word document. **DO NOT start a question with a number or a letter if you chose the Random Questions.**

      - **Example: 1. Who is the President? or a. Who is the President?**

   c) **Objective** – This section may be left blank or you may add an objective. This is not a required field.

   d) **Media Content** – This section may be left blank if external URLs are not needed.

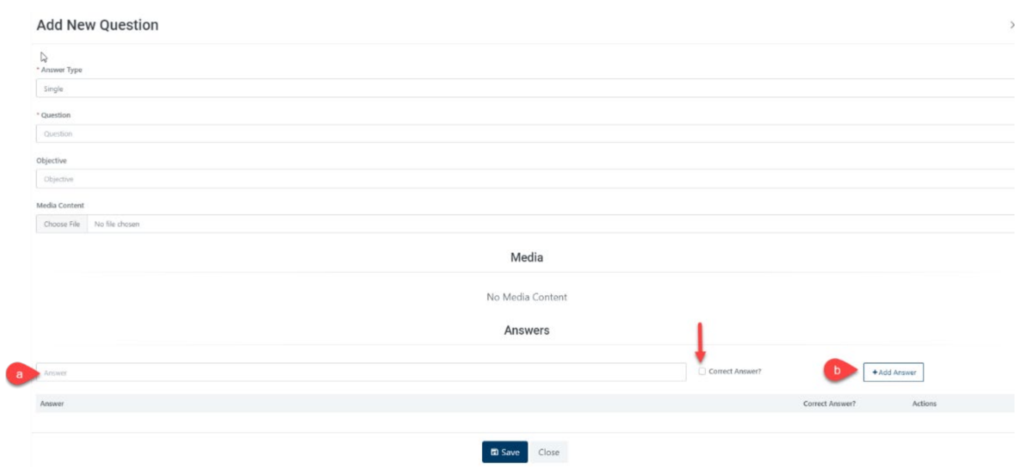


12) Next, go to the **Answer** section:

a) Type the first possible answer in the **Answer** field (you can also cut and paste the answers from a word document). If this is the correct answer, make sure to click on the **Correct Answer** check box.

b) If it is not the correct answer, click on the **+Add Answer box** to continue adding possible answers. **DO NOT start an answer with a number or a letter.**

- Example: 1. True or a. True



13) Once you have entered all of the corresponding options for the questions, click on the Save button at the bottom of your screen.

14) When you have successfully added the questions and answers and clicked on the Save button, the following pop-up notification will appear:

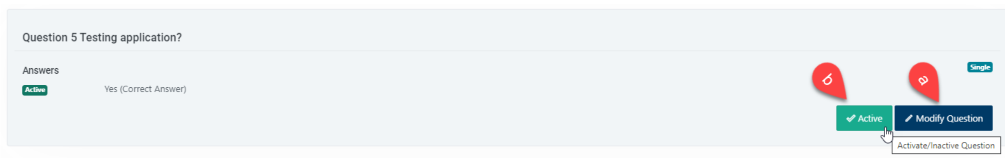
Note: You will start seeing the questions you added under the ***Questions Added*** *section.*

15) **Repeat steps 10 - 14 to continue adding questions.**

16) Verify that everything is correct before proceeding to the next step.

a) If you need to make changes, click on **Modify Question**.

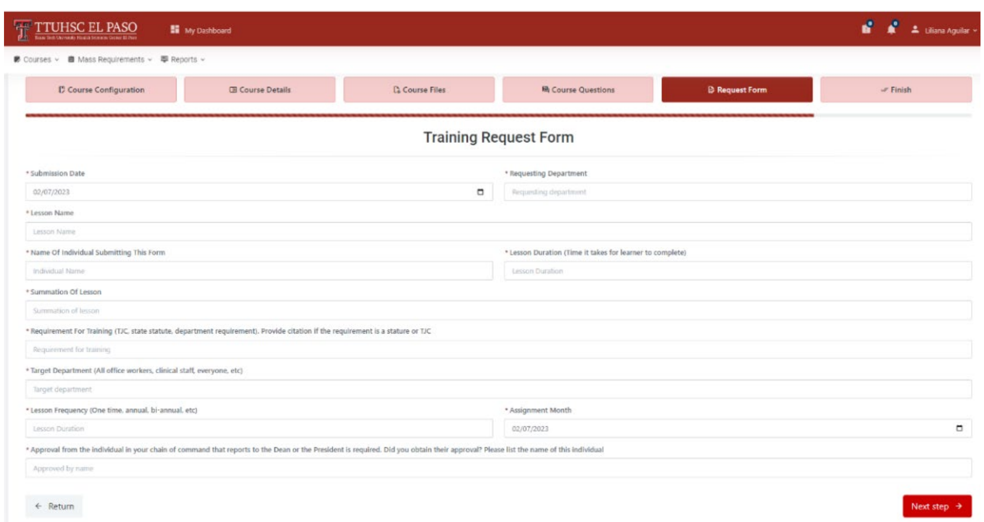
b) You can **Activate/Inactivate** a question. For example, inactivate a question that was submitted in error or was a duplicate entry.



17) Once everything is correct, click on 

at the bottom of the page.

18) Next, you will be directed to the **Request Form** tab. This is the **Training Request Form** screen. All fields need to be filled in.

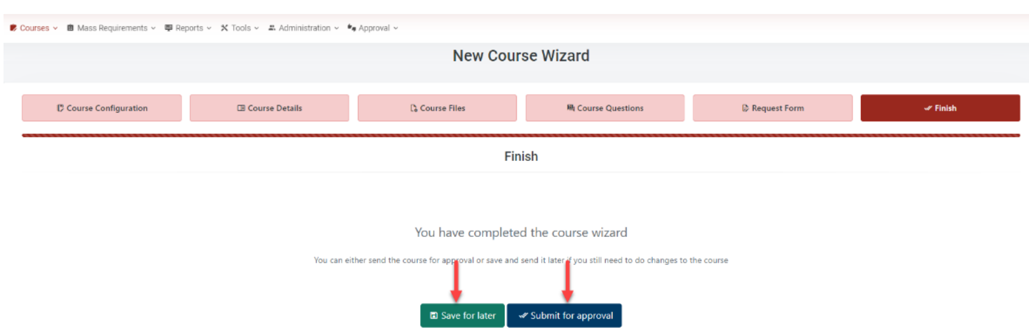


- **Submission Date** – Enter date when training is submitted.
- **Requesting Department** – Enter department that owns the training.
- **Lesson Name** – Enter full name of the course.
- **Name of Individual Submitting This Form** – Enter your full name and title.
- **Lesson Duration** – Enter the time it takes for user to complete the training.
- **Summation of Lesson** – Enter brief summary of training**.**
- **Requirement for Training** – (TJC, state statute, department requirement). Provide Citation if the requirement is statute or TJC.
- **Target Department** – Enter all office workers, clinical staff, everyone, etc.
- **Lesson Frequency** – Determine if training will be assigned one time, annually, bi-annually, etc.
- **Assignment Month** – Enter the date the course is going to be assigned to users.
- **Approval from the individual in your chain of command** that reports to the Dean of the President is required. Did you obtain their approval? Please list the name of this individual.

19) Once this form is completed, click on Next step → at the bottom of the page.

20) The final step in the **New Course Wizard** is the **Finish** tab.

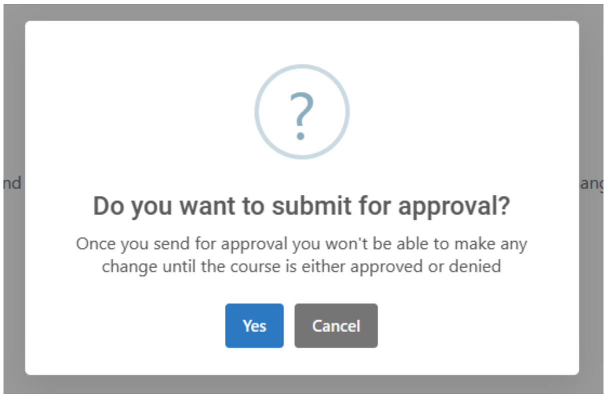
a) In the **Finish** tab, you will have one of two options: **Save for later** or **Submit for approval.**



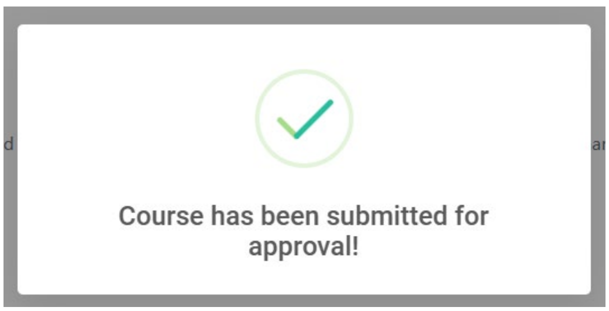
21) When you click the ✓ Submit for approval option, you will see the following pop-up box:

a) If you are ready to submit the course, click **Yes** to submit for approval.

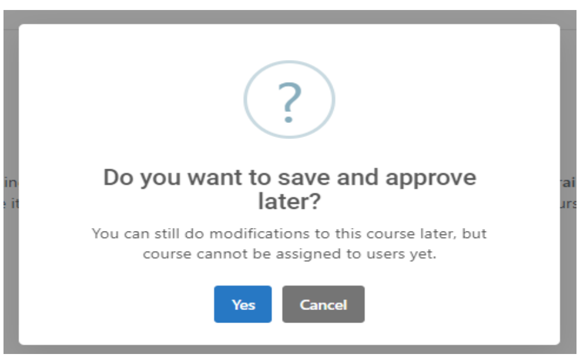
*Note: If you need to back to the **Finish** tab, click **Cancel.***



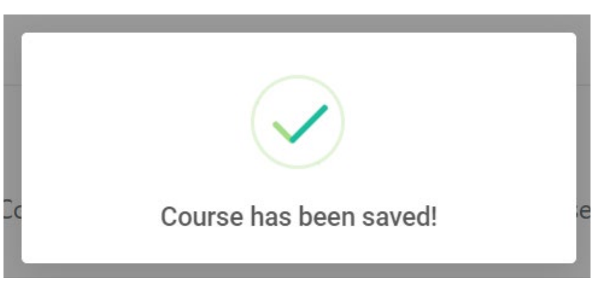
b) Once you click **Yes**, you will see the pop-up screen below confirming the course has been submitted for approval:



22) If you click on the **Save for later** option, you will see the pop-up box below. Click **Yes** to confirm. *Note: To go back to the Finish tab, click **Cancel**.*



a) When you click **Yes**, you will see the following pop-up box stating the training has been saved:



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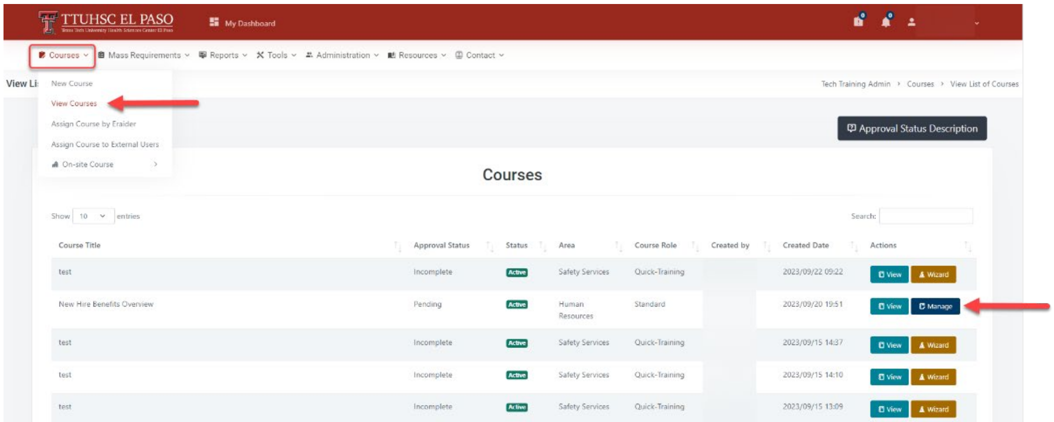
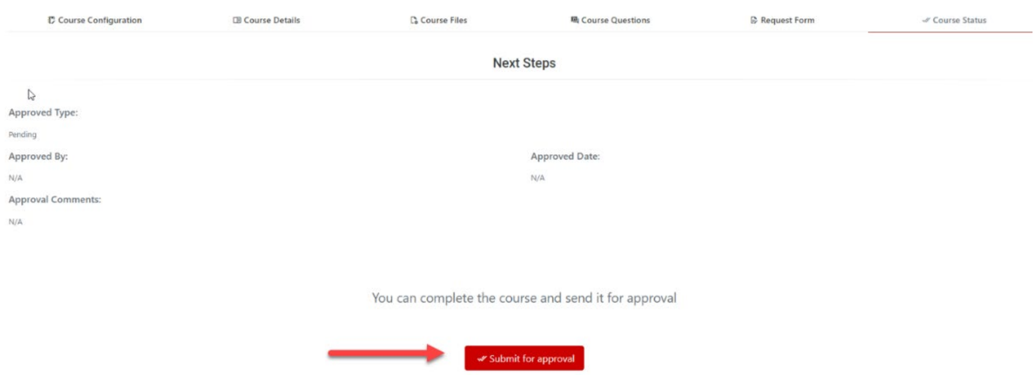
23) If you need to go back to a course that has been saved, click on the **Courses→ View Courses** section to locate the training. The status under the **Actions** column will change to **Manage**. Click on the **Manage** button to open the training.



24) You will be directed to the **Course Configuration** screen. From here, you can click on any one of the tabs to **modify/update** the information.

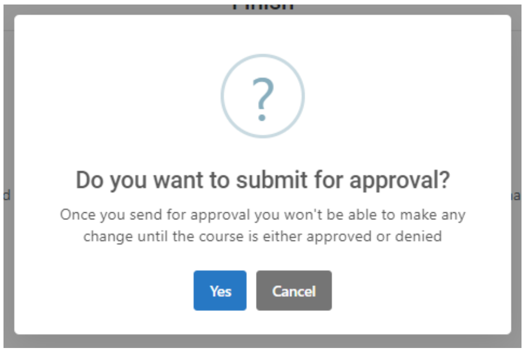
- If you **modify/update** information in one of the tabs, make sure to click on the **Save** button at the bottom of the page.

25) Once you have **modified/updated** the information, go to the **Course Status** tab and click on **Submit for Approval**.



26) When you click on **Submit for Approval**, you will see the pop-up screen below. You may choose to submit the course by selecting **Yes,** or choose **Cancel** to go back to the **New Course Wizard** screen.

27) If you choose **Yes**, you will get another pop-up box indicating that the course has been submitted.



28) Once a course has been **submitted for approval**, an automated email will be sent to the Committee members.

29) When the course has been **approved/denied** by a Committee member, you will receive an automated notification via email.

- Example for when course has been approved:

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To:
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

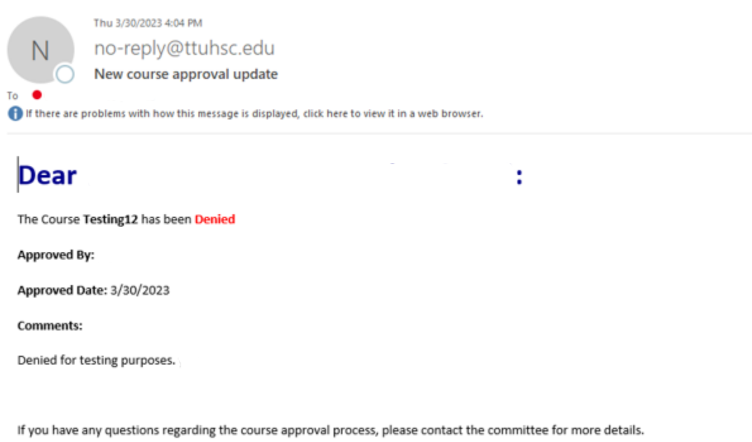
Approved By:

Approved Date: 12/31/2022

Comments:

approve

- Example for when course has been denied:



Thu 3/30/2023 4:04 PM
N
no-reply@ttuhsc.edu
New course approval update
To
If there are problems with how this message is displayed, click here to view it in a web browser.

Dear :

The Course **Testing12** has been Denied

Approved By:

Approved Date: 3/30/2023

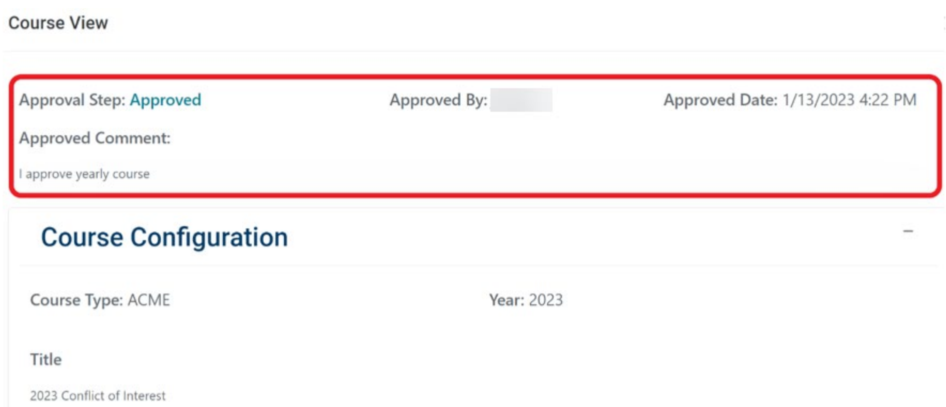
Comments:

Denied for testing purposes.

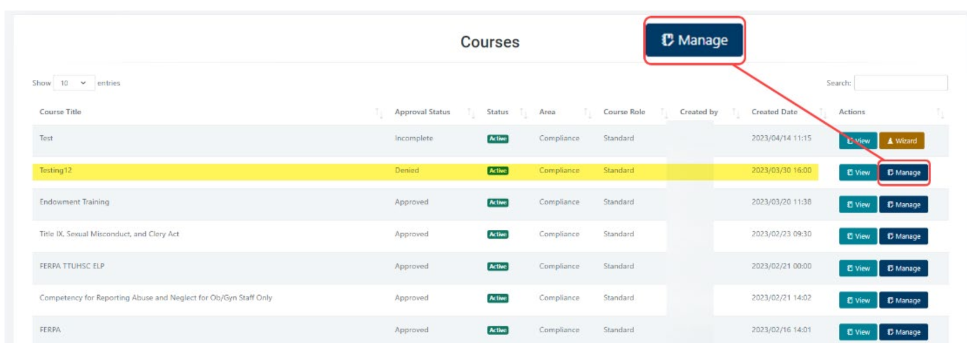
If you have any questions regarding the course approval process, please contact the committee for more details.

30) If the course is denied and changes need to be made, go to the **Courses** tab at the top-left side of the page. Click on the **View Courses** section, look for the course and click on **View** button.

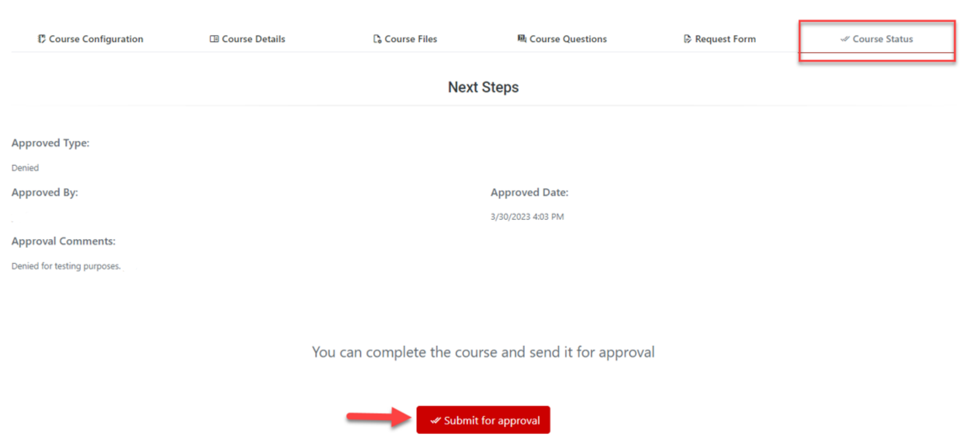
a) In the **Course View** section, you can see the status of the course. If denied, Committee members will indicate the reason for denial under the **Approved Comment** section.



31) If changes need to be made, you can go to the **Manage** button on the right.



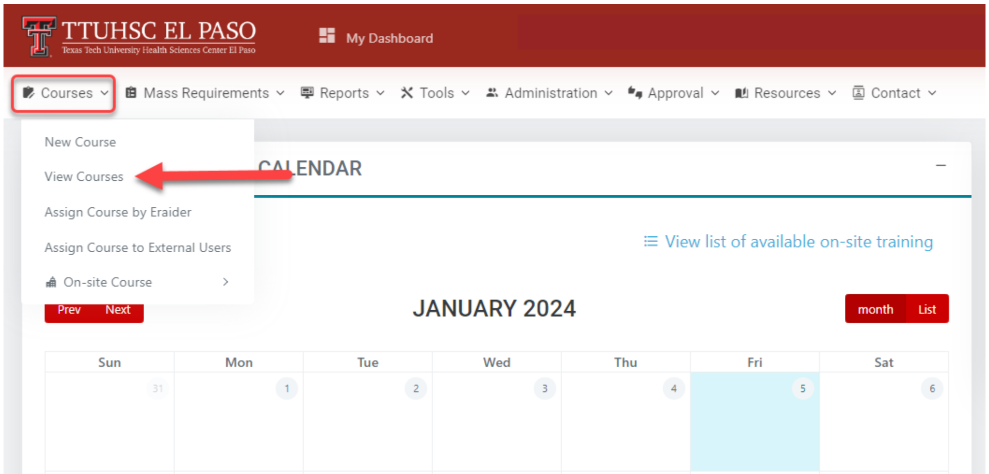
32) Once you have made all necessary edits, you may go to the **Course Status** tab and resubmit the course for approval. (The course will be rerouted to the Committee for approval.)



Note: The training owner will need to resubmit course each year for Committee approval.

COURSES - VIEW COURSES

1) To review courses, click on the **Courses** dropdown menu then click on **View Courses**.



2) In the **View Courses** section, you will see a list of all the courses that have been submitted and their **Status**.

Show 10 entries

Course Title	Approval Status	Status	Area	Course Role
What is iRIS and How Do I get an Account?	Approved	Active	Compliance	Standard
Human Trafficking Policy and Awareness	Approved	Active	Compliance	Standard
Test	Pending	Inactive	Compliance	Standard
Contract and Procurement Training	Incomplete	Active	Compliance	Standard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard
Cash Fund Training	Approved	Active	Compliance	Standard
Cash Fund Training	Incomplete	Active	Compliance	Standard
2023 Conflict of Interest	Approved	Active	Compliance	Standard
2023 General Compliance Training	Approved	Active	Compliance	Standard
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard

Showing 161 to 170 of 188 entries

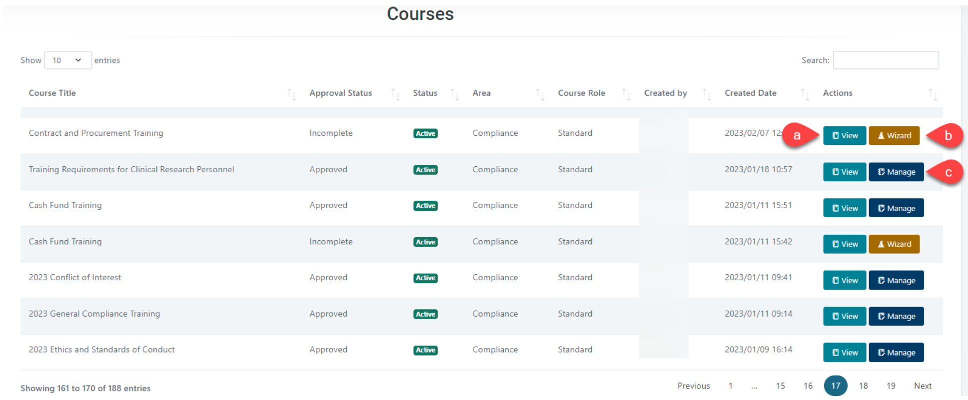
3) The following are the **Course Approval Status Descriptions**:

Course Approval Status Description

Incomplete	The course has not been configured completely
Pending	The course was saved for later but can still be modified
Completed	The course was submitted for approval
Approved	The course was approved by the committee
Denied	The course was denied by the committee

Close

4) You can also **View**, **Manage** or go to the **Wizard** option for the course.



a) If you click the **View** option, you will be able to see a full description for the course when you submitted it.

b) If you click the **Wizard** option, you will be able to update/correct anything from the course. This option will be available when the status is incomplete.

c) If you click the **Manage** option, you will be able to update/correct anything from the course. This option will be available when the course has been submitted and if denied, you will use this option.

5) When the course has been **approved/denied** by a Committee member, you will receive an automated email notification.

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To:
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

Approved By:

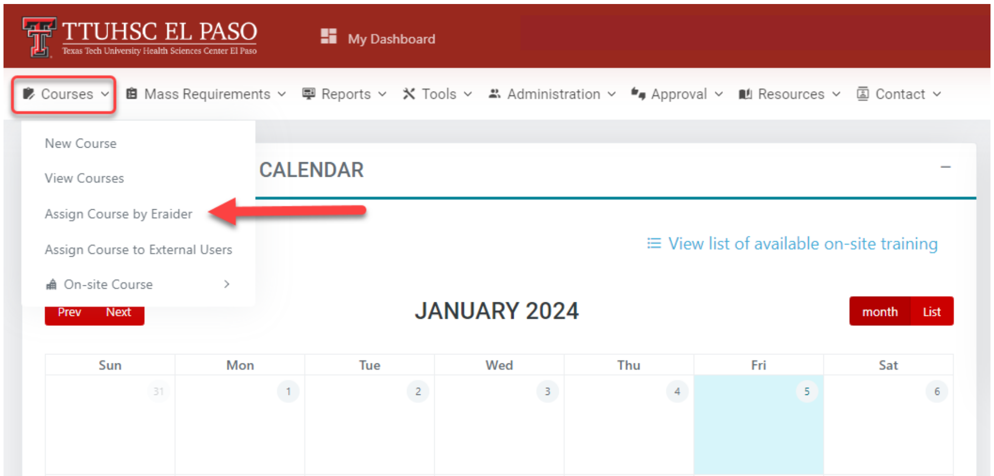
Approved Date: 12/31/2022

Comments:

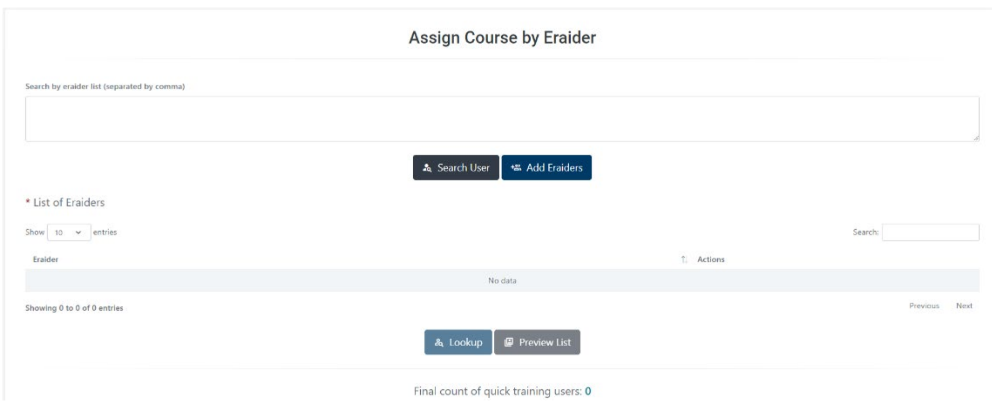
approve

COURSES – ASSIGN COURSE BY ERAIDER

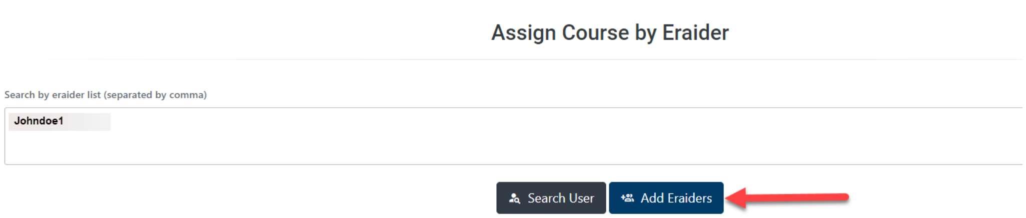
1) To assign a course by eRaider, click on the **Courses** dropdown section, located on top of the page, then click on **Assign Course by eRaider**.



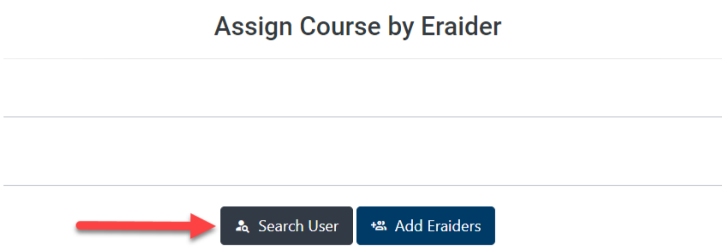
2) This will take you to the **Assign Course by eRaider** page.



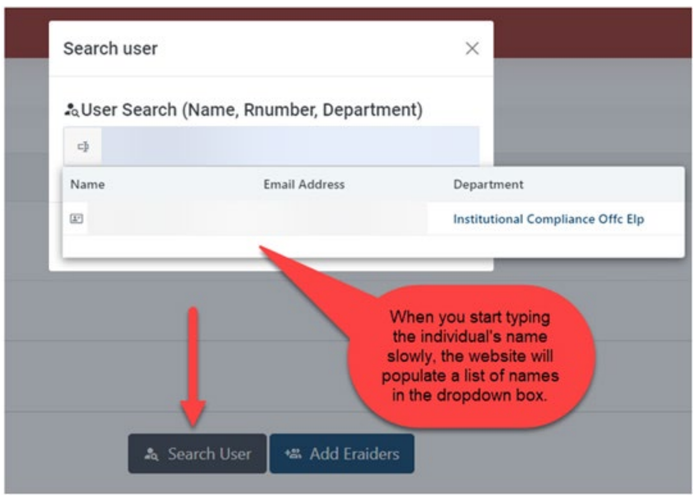
3) In the **Search by eRaider list** section, you can enter each eRaider individually (separated by commas). After you have entered all eRaiders that require training, click on **Add eRaiders** box at the bottom of the page.



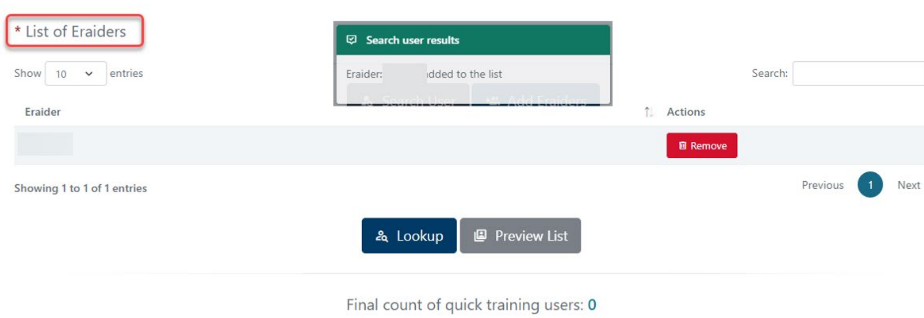
4) If you do not know the eRaiders for the individuals that require training, you can look up the individual in the **Search User** box.

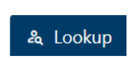


5) When you use the **User Search** box, a pop-up window will appear. In this section you can search by **name, r number** or **department**. You will have a dropdown list of names to choose from.

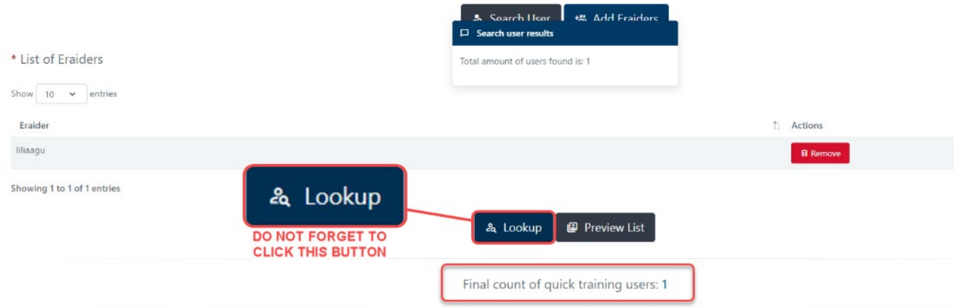


6) When you select the individual's name a pop-up screen will appear, after that, their eRaider will be added to the **List of eRaiders** section.

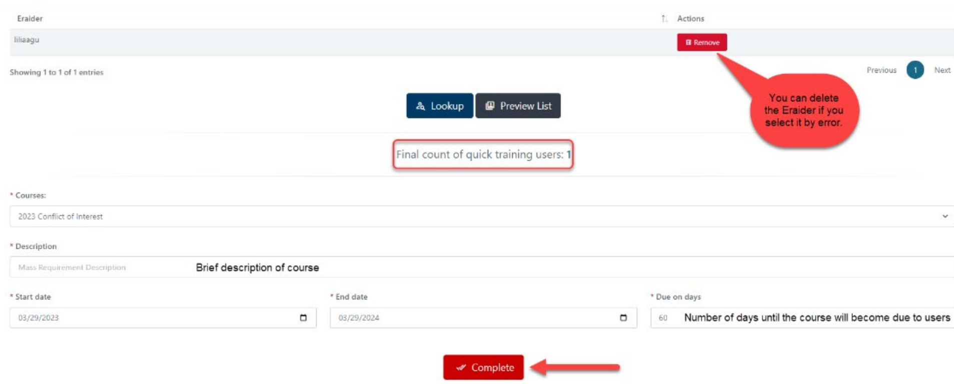


7) After making the selection of the users, click on the  button. This will give you a count of the users that will have the course assigned.

- If you click on the **Preview List** button, you will see a list of the users that have been selected.



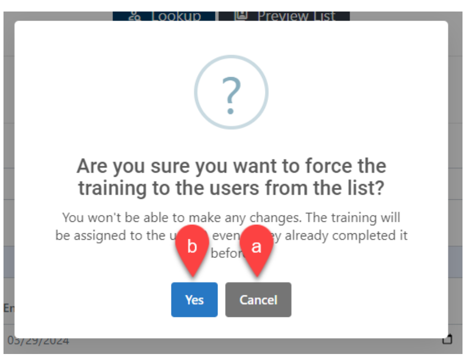
8) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Complete**.



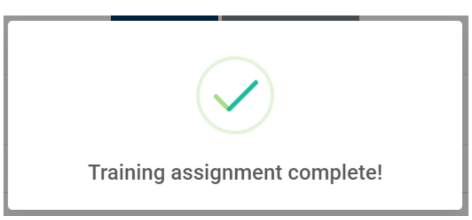
9) Next, a pop-up window will appear.

a) Click **Cancel** to stay on **Assign Course by Eraider** section.

b) Click **Yes** to proceed.



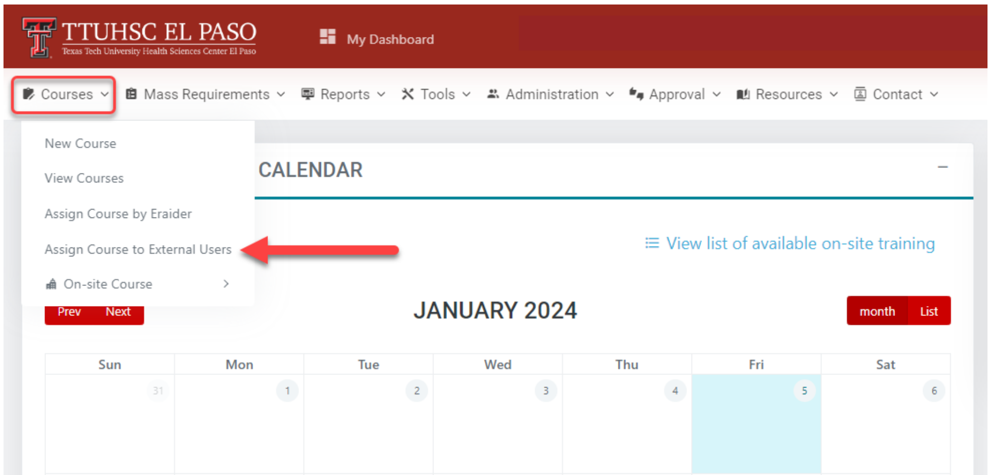
10) A pop-up notification will appear to confirm your submission.



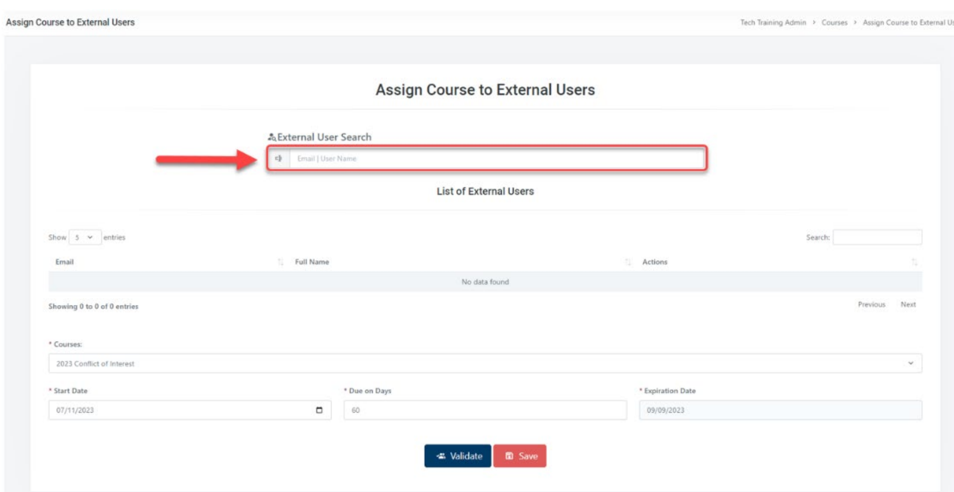
COURSES – ASSIGN COURSE TO EXTERNAL USERS

1) To assign a course to an external user, click on **Courses** dropdown section, located on top of the page, then click on **Assign Course to External Users**.

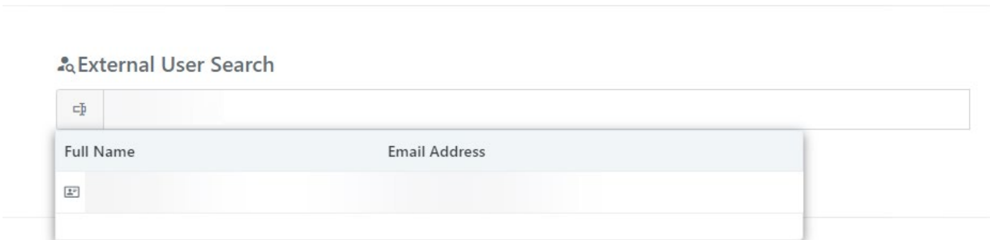
   Note: Remember, this is feature is only available for an existing external user. If the external user hasn't been created, refer to the Manage External Users section.



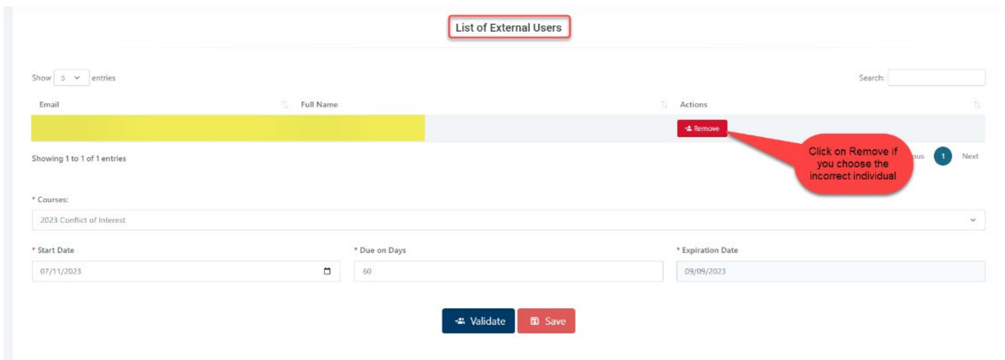
2) This will take you to the **Assign Course to External Users** page.
   *Note: This option will allow you to search by **email, last name or first name** only.*



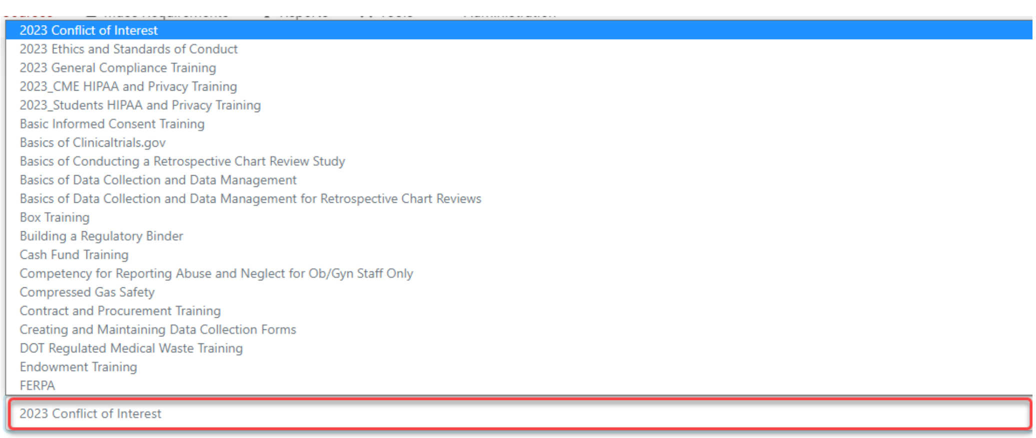
3) Next, type the name or email of the external user in designated field. A list of names will appear in a dropdown box. Click on the name of the individual.



4) This will add the name to the **List of External Users**. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

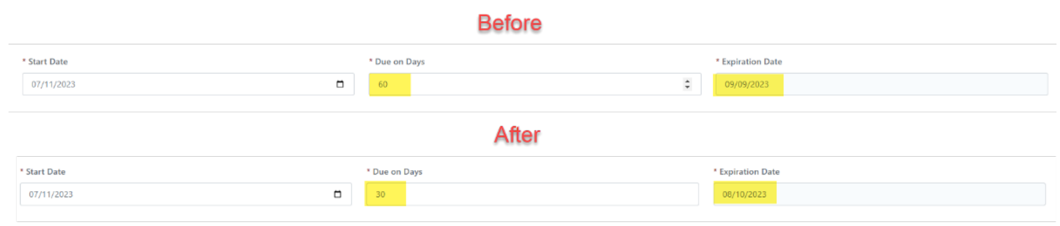


5) In the **Courses** dropdown box, you will have a list of trainings that can be assigned. Select the required course.



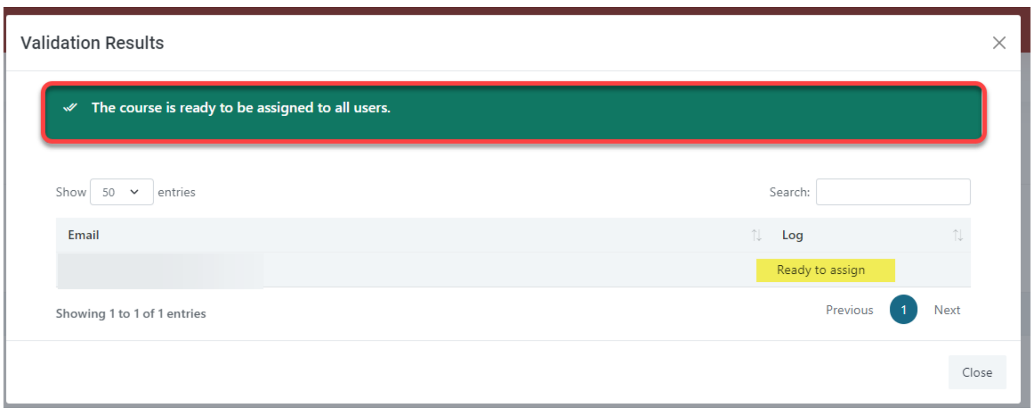
6) You can change the **Start Date**, **Expiration Date** and **Due on Days**.

Note: if you change the Due on Days, the Expiration Date will be updated automatically.



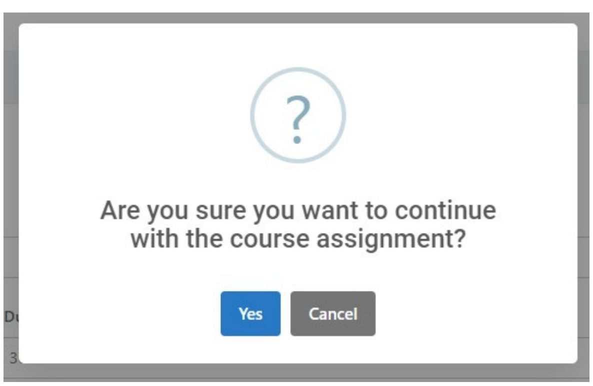
7) Next, click on the  button.

8) A pop-up message will appear stating that the courses have been assigned to the users. *Note: If the course has already been assigned, a red pop-up notification will state this. If multiple trainings will be assigned to an individual, repeat steps 5-7.*



9) Next, click on the  button at the bottom of the page.

10) A pop-up box will ask you if you are sure to continue. Click **Yes** to continue and **Cancel** to go back.



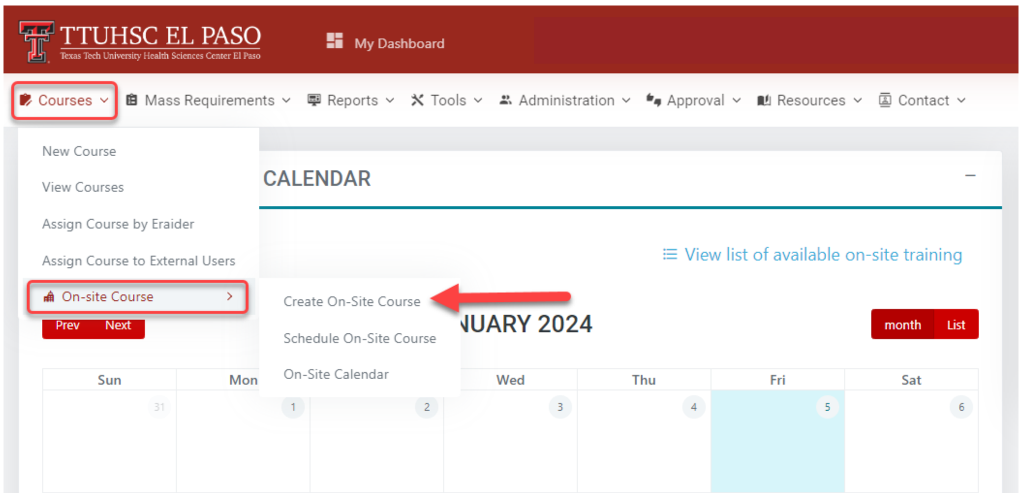
11) To verify that you have successfully assigned the training(s), go to **Manage External Users** and click on **View**. For more information on this, please refer to the ADMINISTRATION – Manage External Users section.

COURSES – CREATE ON-SITE COURSE

This feature will allow the user to create a course outline for individuals to register for a live, WebEx or online training session. Individuals will be able to self-enroll via the Tech Training application calendar.

Note: This feature will only be available for PowerUser, Administrator, and Committee roles.

1) To create an On-Site Course, click on the **Courses** dropdown → **On-Site Course** → then click on **Create On-Site Course**. You will see the following screen:



2) You will be directed to the **Create New On-Site Course** screen. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

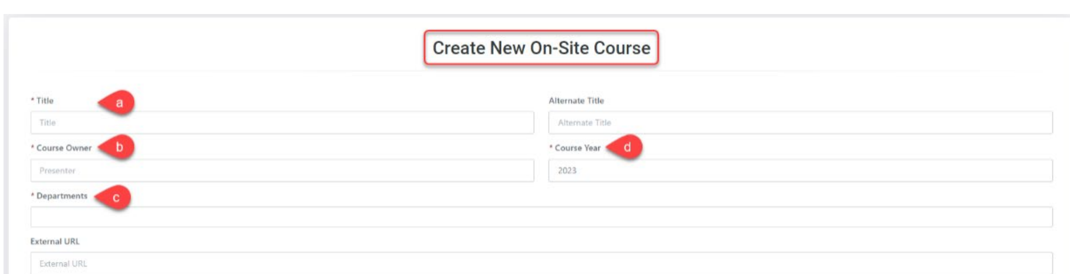
   a) **Title** – Enter your desired title.

      - **Alternate Title** – This field can be left blank or you can type in the same as the Title.

   b) **Course Owner** – Type the name of the person presenting the training.

   c) **Departments** – Choose the departments that will be able to see the course.

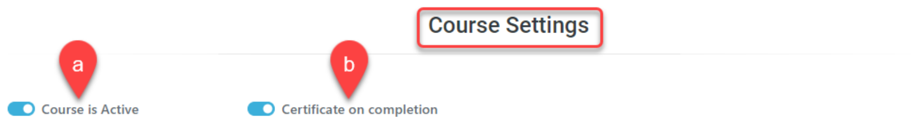
   d) **Course Year** – Select the current year.



3) Next, scroll down the page and in the **Course Settings** section:

a) Leave the **Course is Active** toggle button blue if you want everybody to see the course. If disabled, only the individuals with Administrator and PowerUser role will be able to see the course.

b) Leave the **Certificate on completion** toggle button blue so the users can download the certificate after passing the training.



4) In the **Course Details** section, fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

a) **Course Description** – enter a short description of the course.

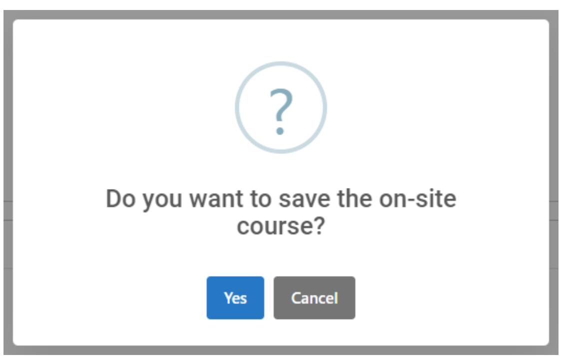
b) **Objectives** – outline the goals for the user upon the completion of this course.

c) **Outline** – enter a general description of the course content and instructions.

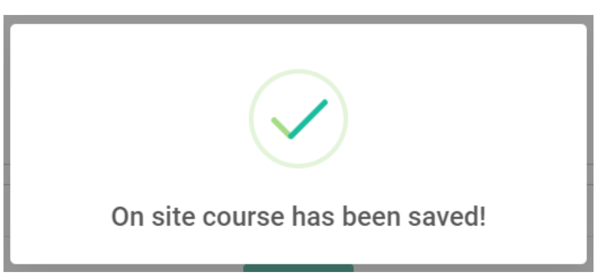
5) Click on the 

button to continue.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the* ***Create New On-Site Course*** *screen, click* ***Cancel****.*



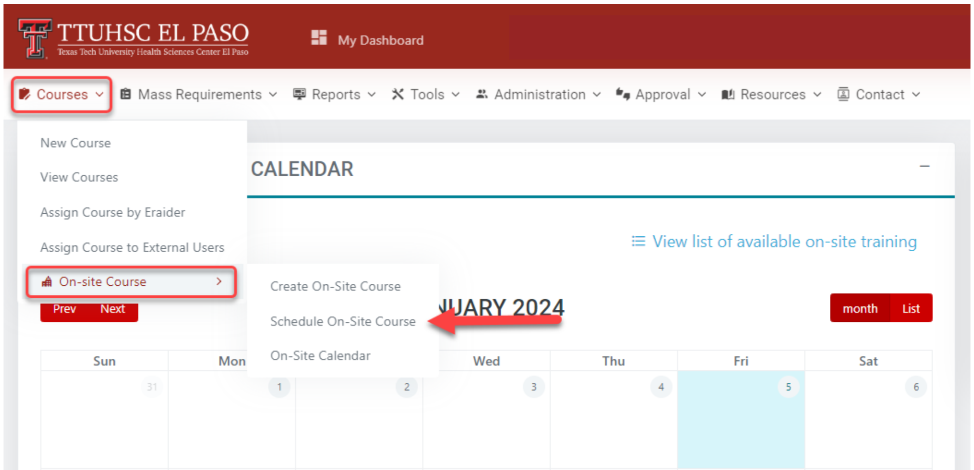
7) Once you click **Yes**, you will see the pop-up screen below confirming the course has been saved.



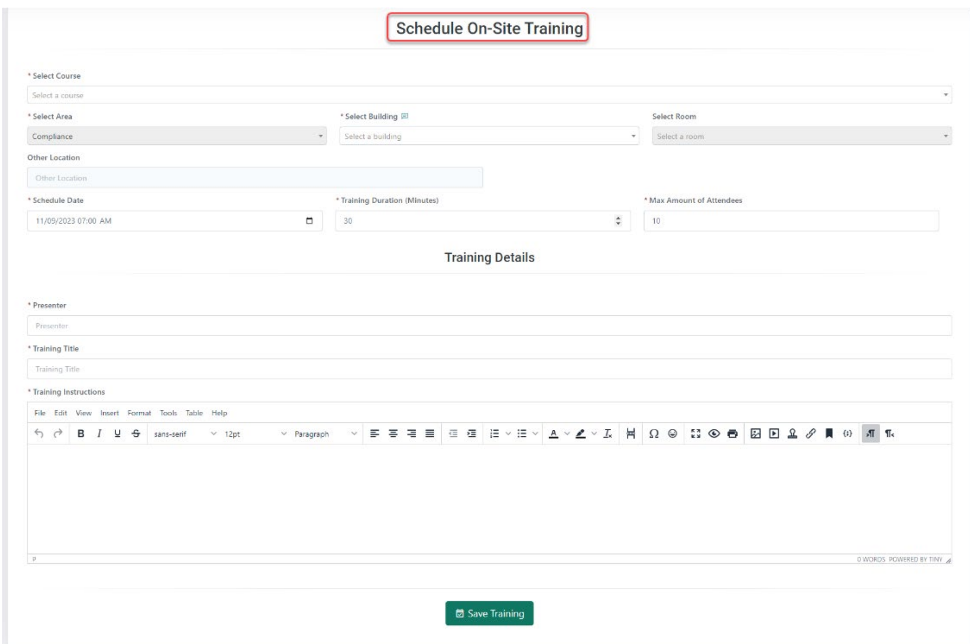
COURSES – SCHEDULE ON-SITE COURSE

This feature will allow users to set a time and place for the On-Site courses created.

1) To set a time and place for your course, click on the **Courses** dropdown → **On-Site Course** → then click on **Schedule On-Site Course**.



2) You will be directed to the **Schedule On-Site Training** screen.



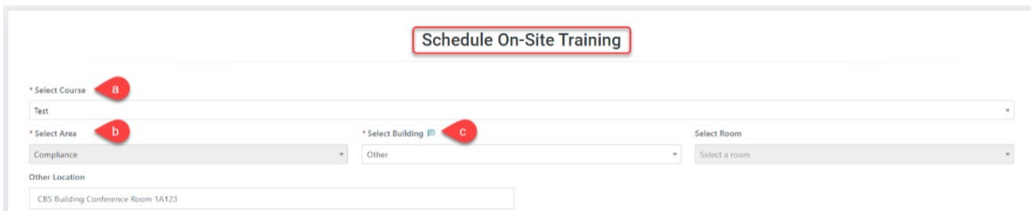
a) **Select Course** – In the dropdown field, select the training you created.

b) **Select Area** – This field will automatically populate with your department.

c) **Select Building** – In the dropdown field, select the building that the training will be scheduled at for users to attend. If your desired building is not listed, select the **Other** option. Once the building is selected, you will be able to select the room.

- **Select Room** – In the dropdown field, select the room number.

- **Other Location** – If you choose the **Other** option in the **Select Building field**, type your desired building and room number.

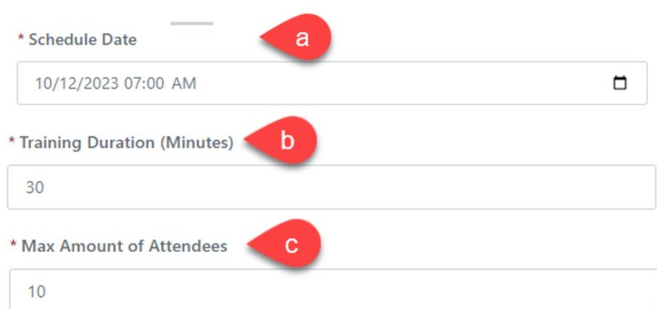


3) Scroll down and fill in the following fields.

a) **Schedule Date** – Select the date and time of the training session.

b) **Training Duration** – Indicate the length of time, in minutes, the training will take.

c) **Max Amount of Attendees** – Indicate the maximum amount of people that can attend the training session.



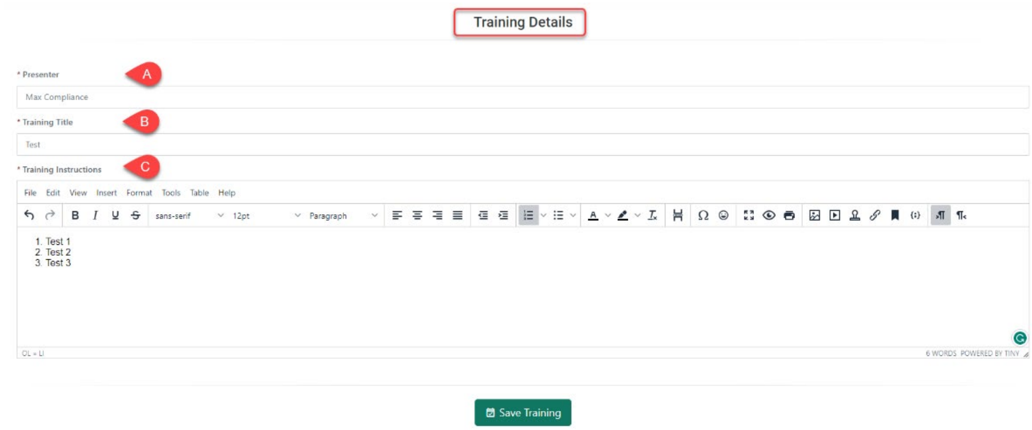
4) Next, go down the page and in the **Training Details** section, fill out the required fields.

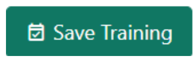
Note: Required fields are identified by an asterisk (*).

a) **Presenter** – Name of the person who is presenting the training.

b) **Training Title** – Type the name of the course you created.

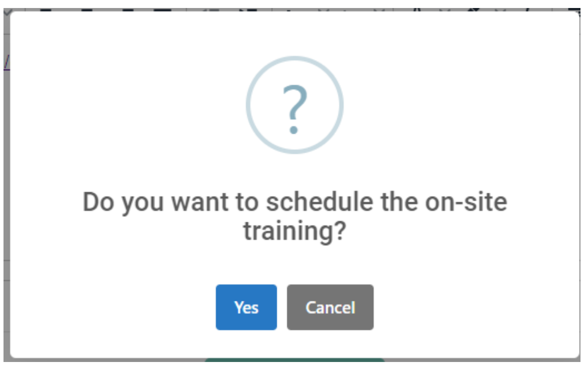
c) **Training Instructions** – Indicate what the users are going to do in the training session or if they will need to log in to web-based training.



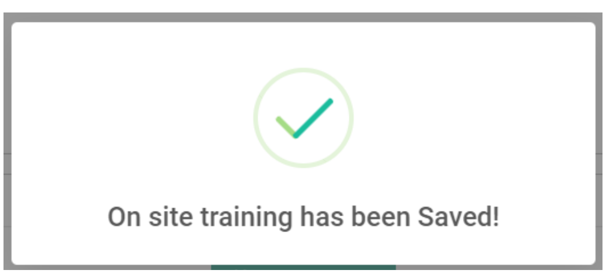
5) When you are ready, click on the 

button.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Schedule On-Site Training screen, click* ***Cancel****.*



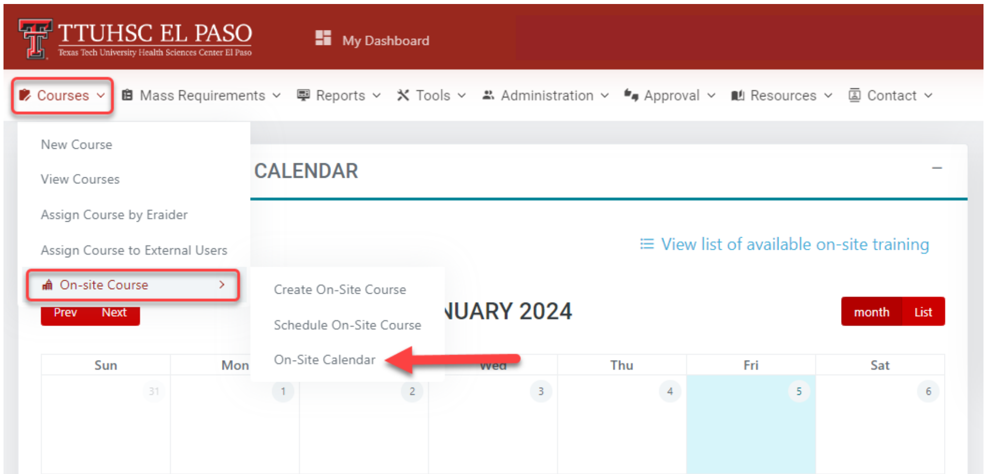
7) Once you click **Yes**, you will see the pop-up screen below confirming the On-Site training has been saved.



COURSES – ON-SITE CALENDAR

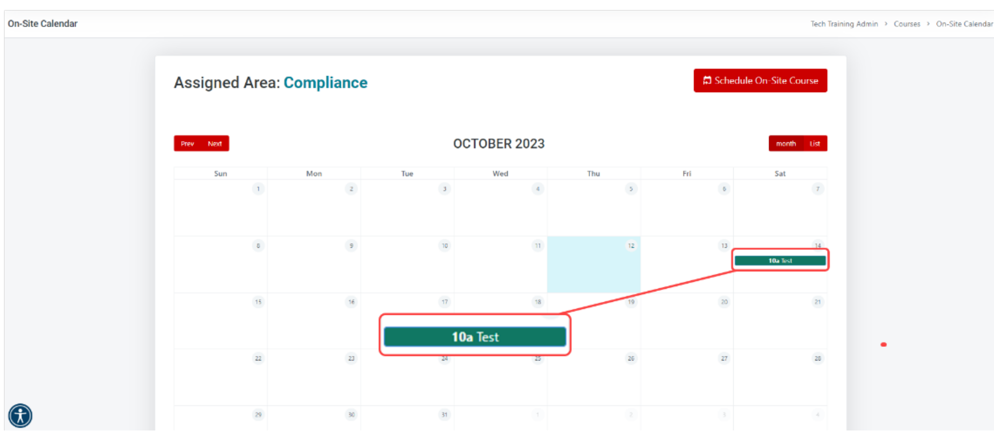
This feature will allow the user to modify/update the **On-Site Training** details such as the course, the area, location, duration, training instructions, etc.

1) To see the **On-Site Calendar**, click on the **Courses** dropdown → **On-Site Course** → then click on **On-Site Calendar**.

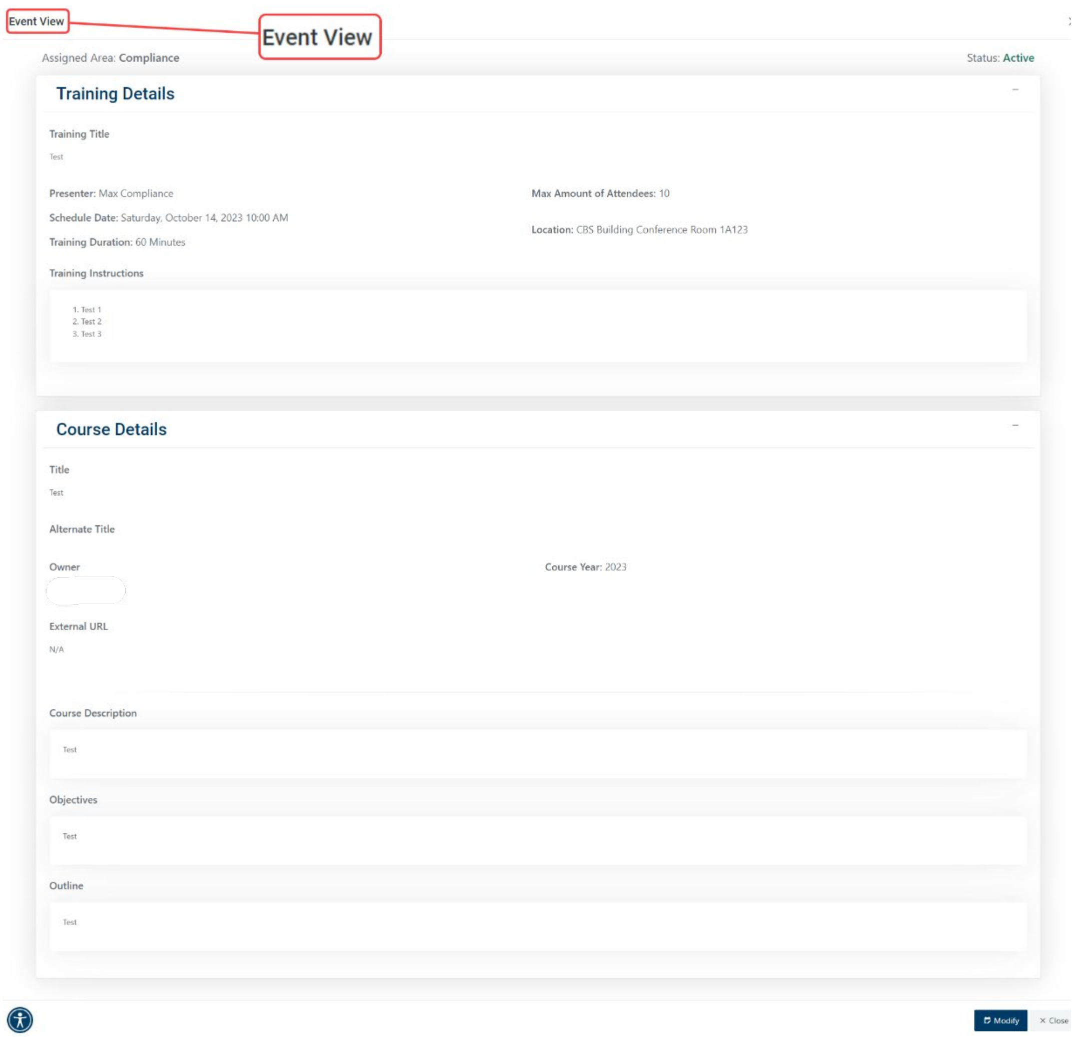


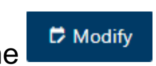
2) You will be directed to the **On-Site Calendar**. The available courses will appear in the calendar.

   a) If you want to see the details for that course, click on the name of the course.



3) Next, you will see the **Event View** screen. In this page you will be able to see all details for that course.

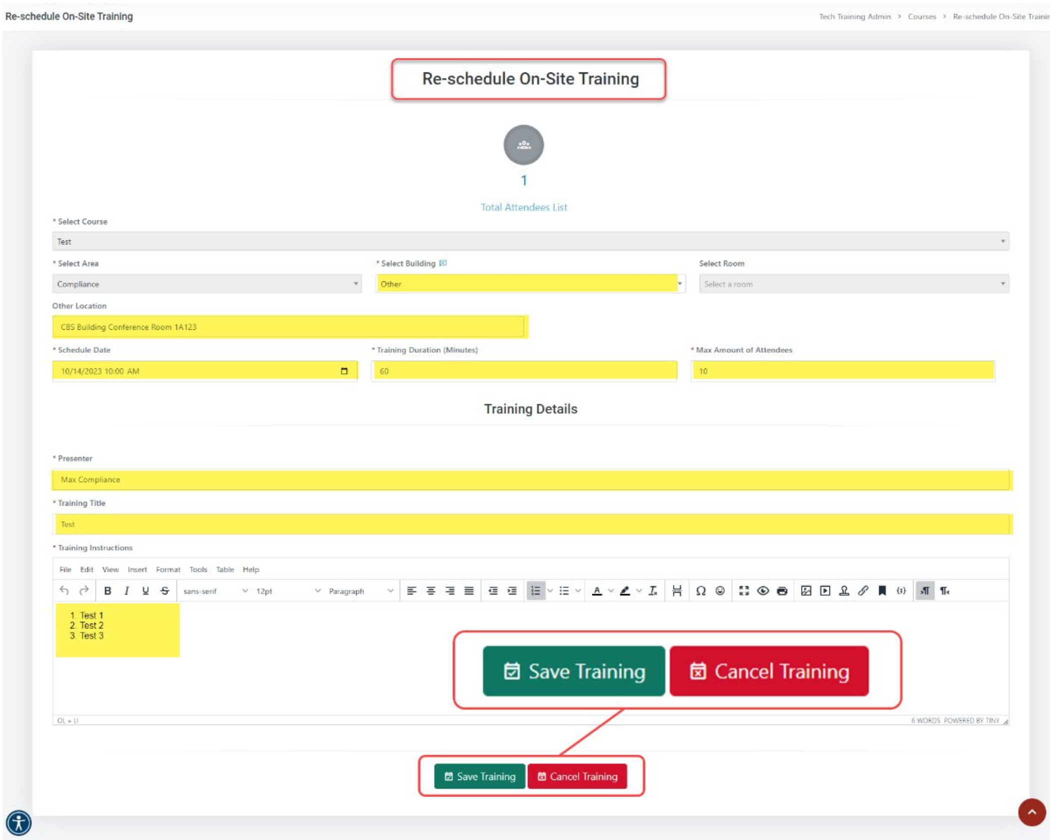


4) To modify/update the information for the course, click on the 

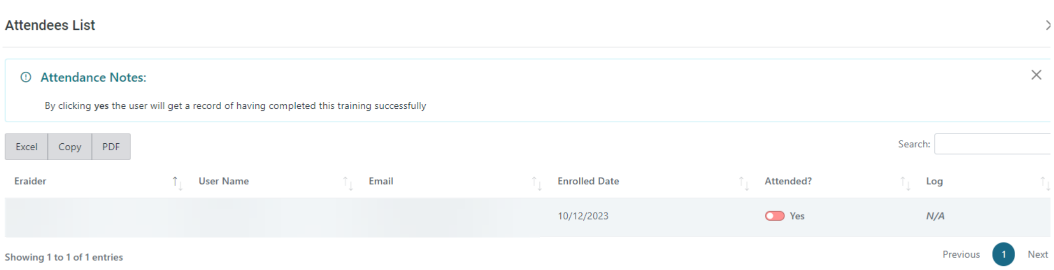
button at the bottom of the page.

5) You will be directed to the **Re-schedule On-Site Training** page. You can change/update the building, location, date, duration, and number of attendees, presenter, title, and instructions.

Note: ***Do not*** *forget to click on Save Training if you change/update any information. You can also cancel the training if desired.*



a) To see the list of attendees, click on the Total Attendees List link at the top of the page. You will see the following list:

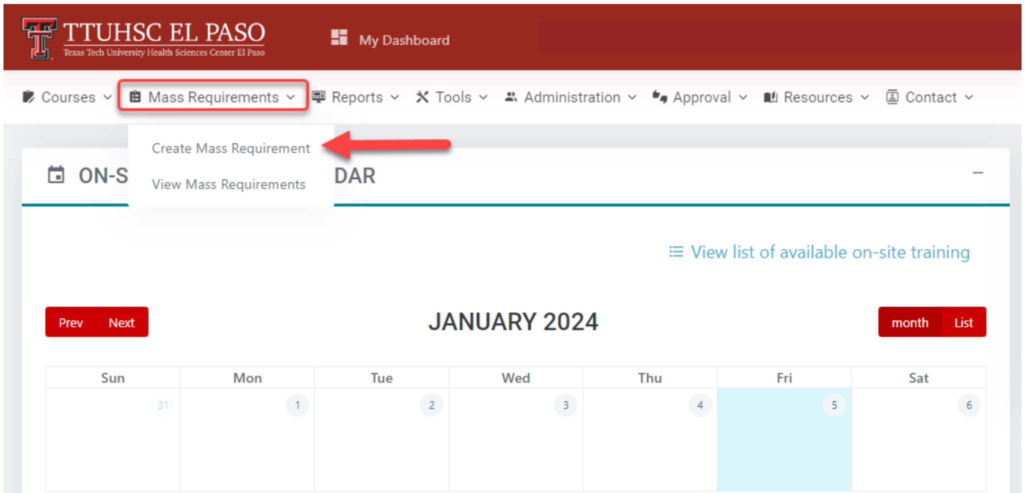


Note: If the training has ended, you can no longer make changes to the training.

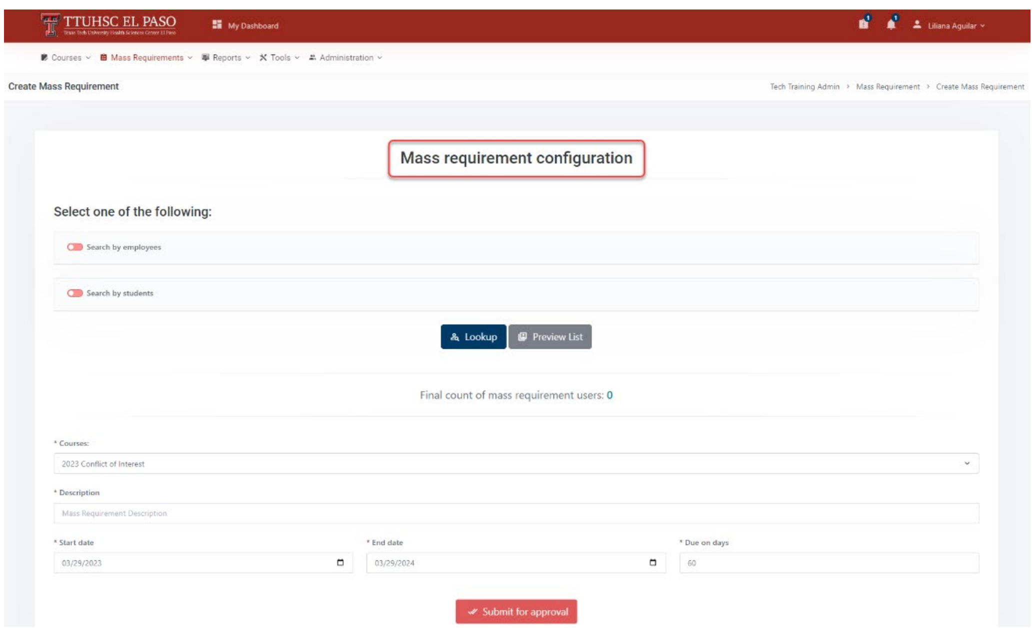
b) At this point, the presenter can confirm attendance by modifying the **Yes** toggle button in the **Attended?** Column.

MASS REQUIREMENT - CREATE A MASS REQUIREMENT

1) To assign a Mass requirement, click on the **Mass Requirements** dropdown at the top of the page, then click on **Create Mass Requirement**.



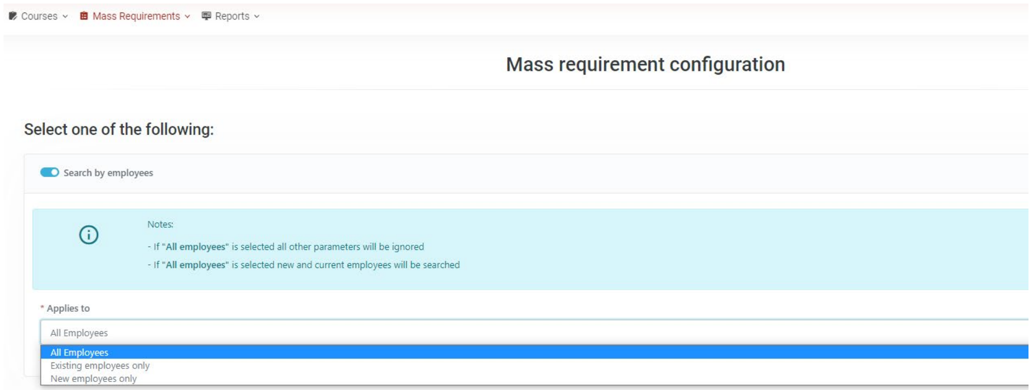
2) This will take you to the **Mass requirement configuration** page.



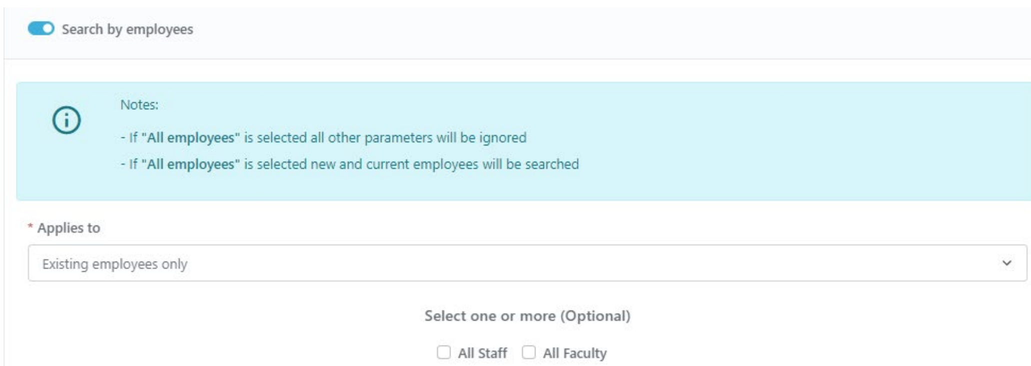
3) To use **the Search by employees** option:

a) In the **Applies** to dropdown menu, you will be able to select **All Employees**, **Existing employees only** or **New employees only**.

- The **All Employees** option will allow you to select all employees.



b) If you select **Existing employees only** or **New employees only**, you will have the option to choose **All Staff** or **All Faculty**. You may select both options at the same time, if needed.



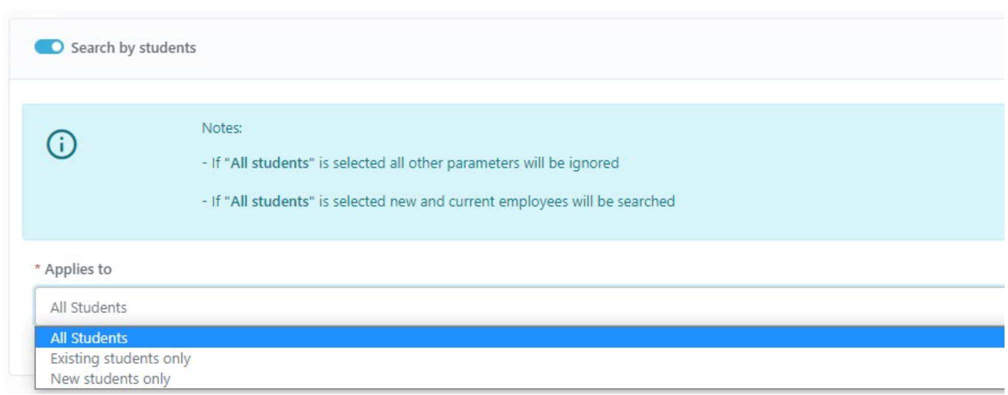
c) If you select **Existing employees only** or **New employees only:**

- You will have the option to select the department under the **Select a department** dropdown box and the positions under the **Select a position** dropdown box.

4) To use the **Search by students** option:

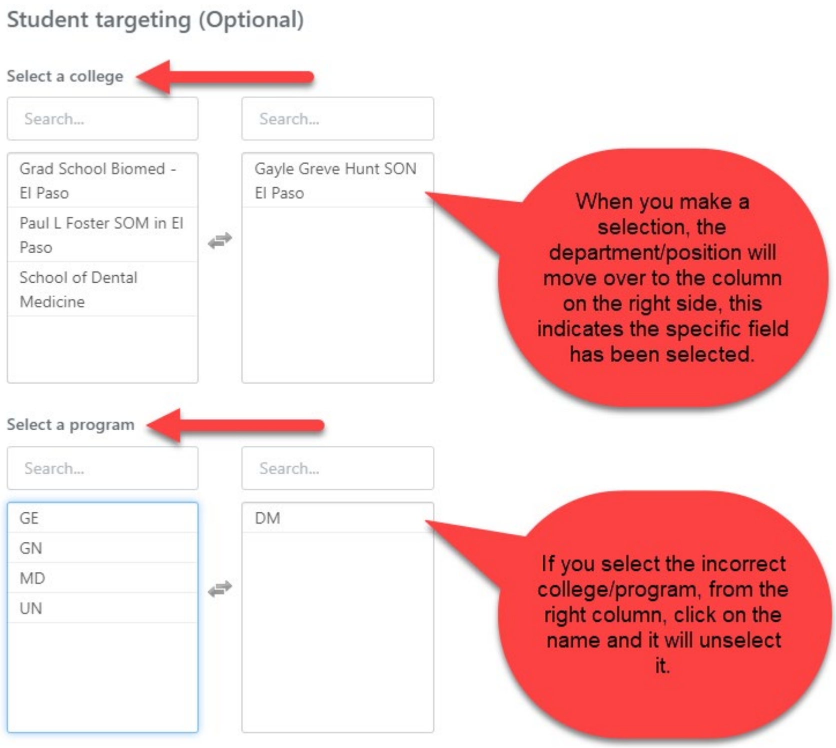
a) In the **Applies to** dropdown section you will have 3 options: **All Students, Existing students only** and **New students only**.

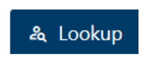
- The **All Students** option will allow you to select all students.



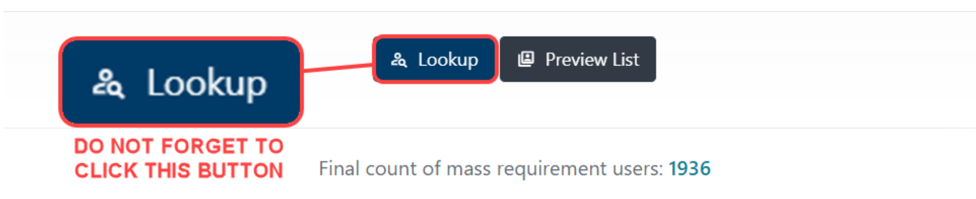
b) If you select **Existing Students only** or **New students only**:

- You will have the option to select any **college / program**. Click on the desired college / program under the **Select a college** and **Select a program** dropdown boxes.

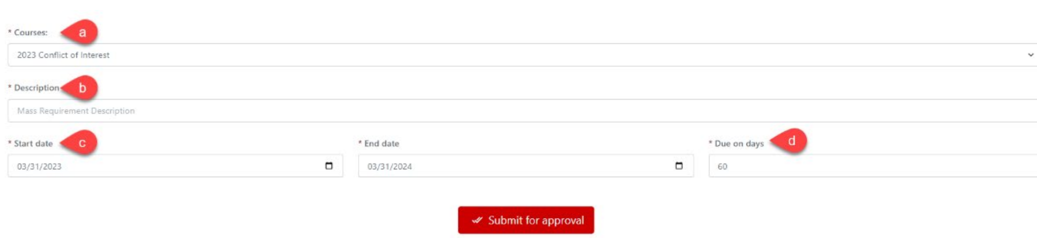


5) After making the selection of the users, click on the 

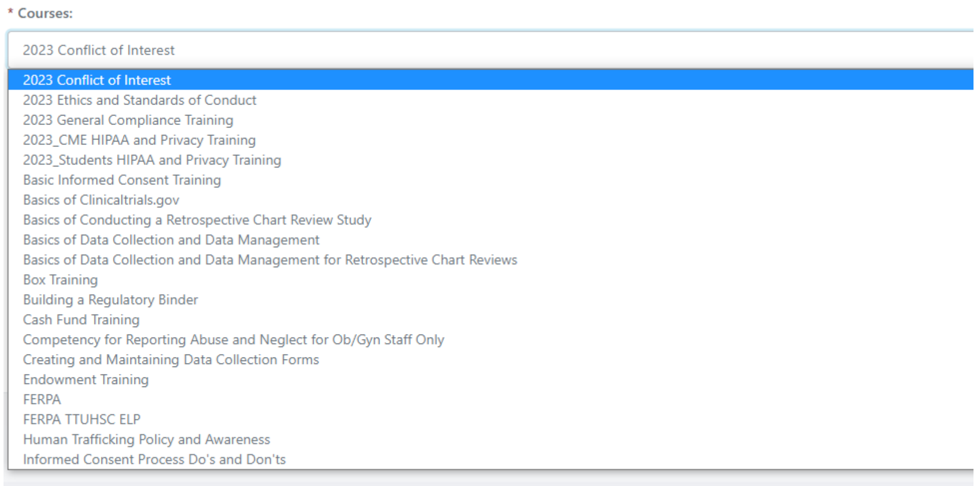
button. This will give you a count of the users that will be assigned to the mass requirement. If you click on the **Preview List** button, you will see a list of the users that will be assigned to the mass requirement.



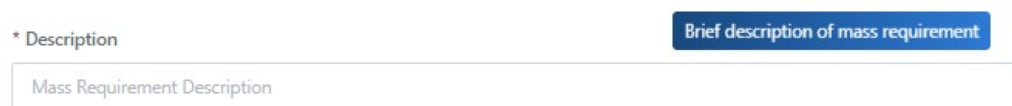
6) Next, you will scroll down to the bottom portion of the **Mass requirement configuration**.



a) The **Courses** section will have a dropdown menu where you can select the course you need.



b) Enter a brief **description** in this section:

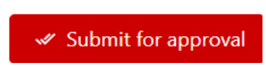


c) **Start date** – Enter the current date.

*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

d) **End date** – Enter the last day of the current calendar year. This ensures that the course remains active for the calendar year. (Remember, each calendar year you will be required to upload the course and obtain Committee approval.)

e) **Due on days –** Enter the number of days the users have to complete the course.

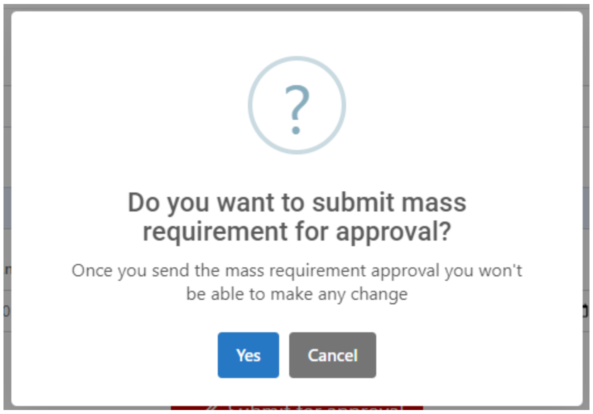
7) Once you have entered all the required fields, click on the 

button at the bottom of the page.

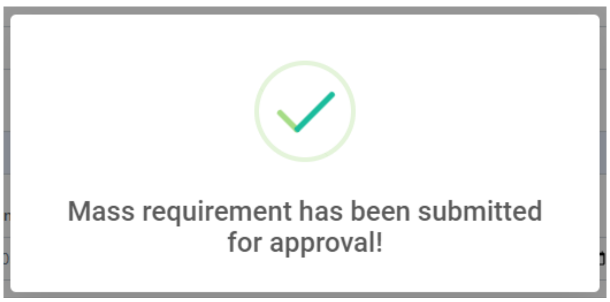
8) You will see the following pop-up:

a) If you are ready to submit the mass requirement, click **Yes** to submit for approval.

*Note: If you need to back to the **Finish** tab, click **Cancel**.*



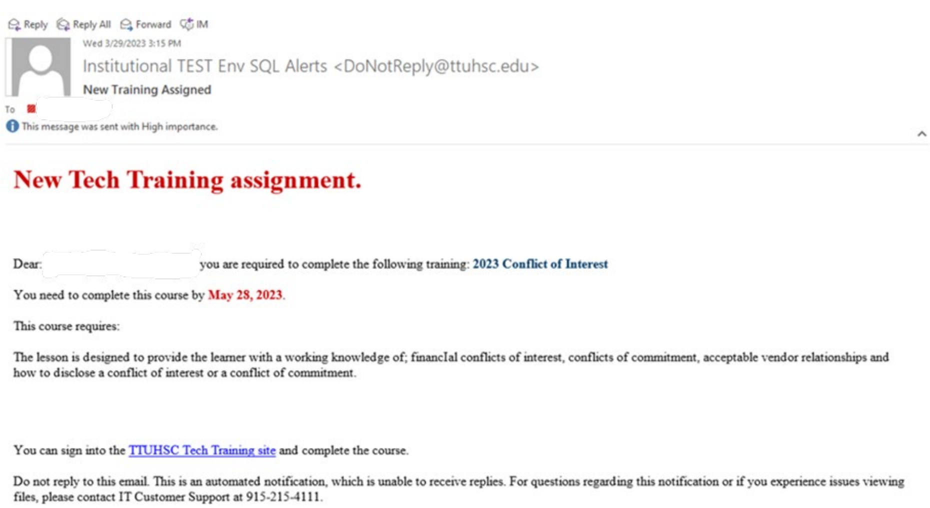
9) If you click **Yes**, you will see the following notification:



10) The **Mass Requirement** will need to be approved by the Committee before the training is assigned.

11) To check on the Mass Requirement approval status, refer to the **Mass Requirement Report**.

12) One the **Mass Requirement** has been approved by the Committee, the users will receive an email notification stating the training has been assigned.



Reply Reply All Forward IM

Wed 3/29/2023 3:15 PM

Institutional TEST Env SQL Alerts <DoNotReply@ttuhsc.edu>

New Training Assigned

To

This message was sent with High importance.

New Tech Training assignment.

Dear: you are required to complete the following training: **2023 Conflict of Interest**

You need to complete this course by **May 28, 2023**.

This course requires:

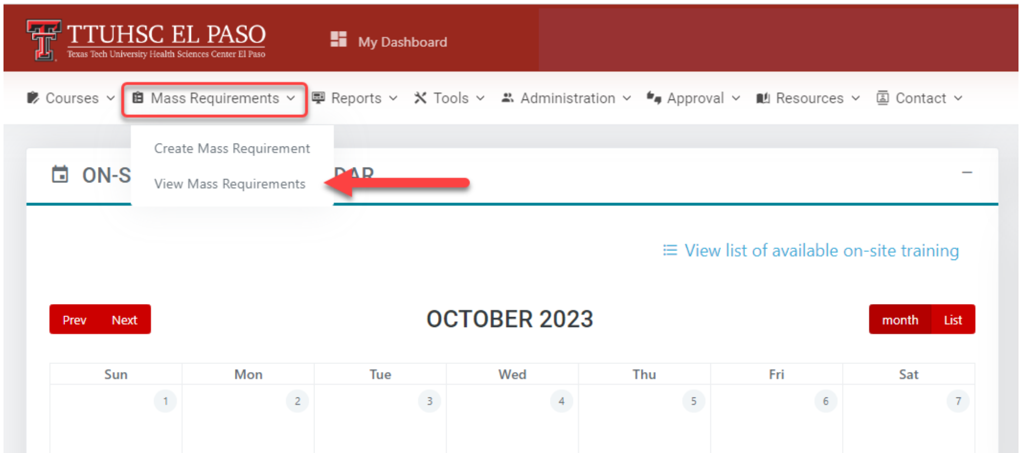
The lesson is designed to provide the learner with a working knowledge of; financIal conflicts of interest, conflicts of commitment, acceptable vendor relationships and how to disclose a conflict of interest or a conflict of commitment.

You can sign into the TTUHSC Tech Training site and complete the course.

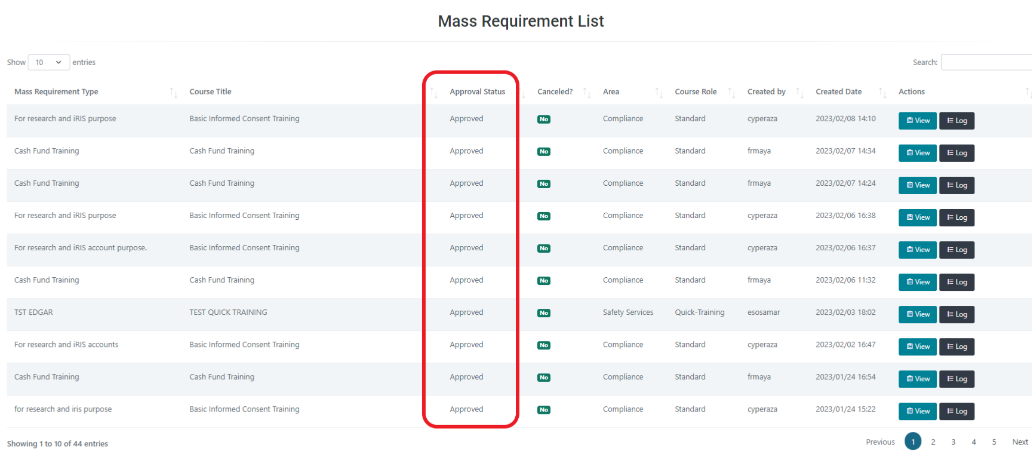
Do not reply to this email. This is an automated notification, which is unable to receive replies. For questions regarding this notification or if you experience issues viewing files, please contact IT Customer Support at 915-215-4111.

MASS REQUIREMENT – VIEW MASS REQUIREMENT

1) To check the status of a mass requirement, go to the **Mass Requirement** dropdown and click on **View Mass requirements**.



2) This will take you to the **Mass Requirement List** where you can check the status of the assignment in the **Approval Status** column.



Mass Requirement List

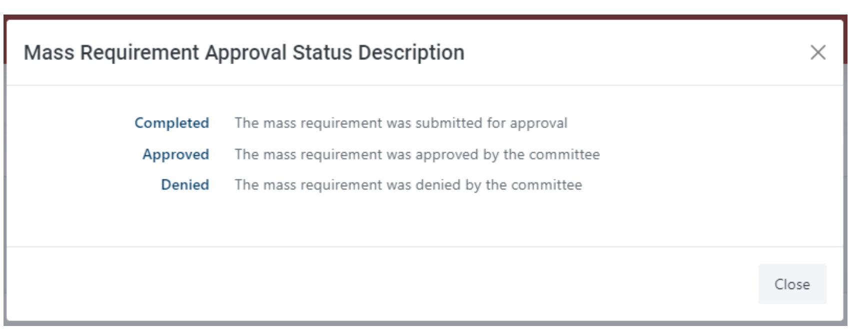
Show 10 entries

Search:

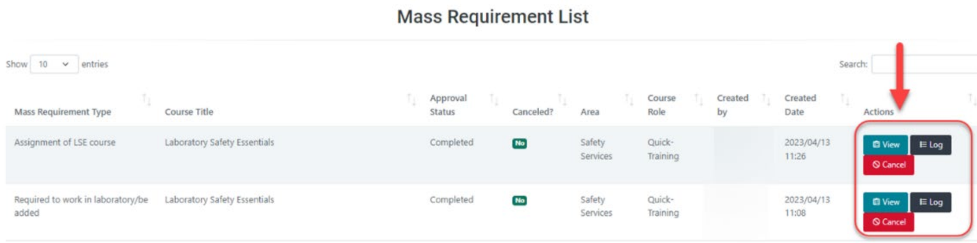
Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
For research and iRIS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/08 14:10	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	frmaya	2023/02/07 14:34	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	frmaya	2023/02/07 14:24	View Log
For research and iRIS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/06 16:38	View Log
For research and iRIS account purpose.	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/06 16:37	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	frmaya	2023/02/06 11:32	View Log
TST EDGAR	TEST QUICK TRAINING	Approved	No	Safety Services	Quick-Training	esosamar	2023/02/03 18:02	View Log
For research and iRIS accounts	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/02 16:47	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	frmaya	2023/01/24 16:54	View Log
for research and iris purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/01/24 15:22	View Log

Showing 1 to 10 of 44 entries   Previous 1 2 3 4 5 Next

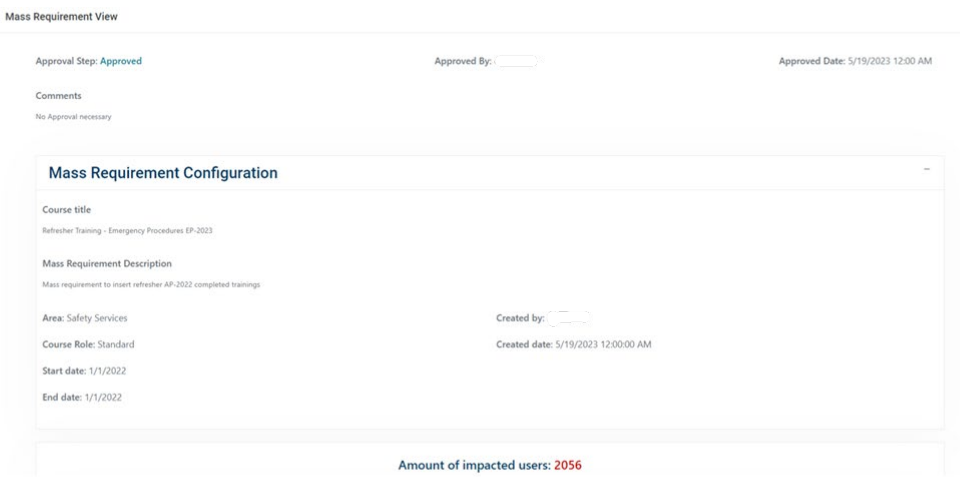
a) Click on the top right side of the page to see the **Approval Status Descriptions**.



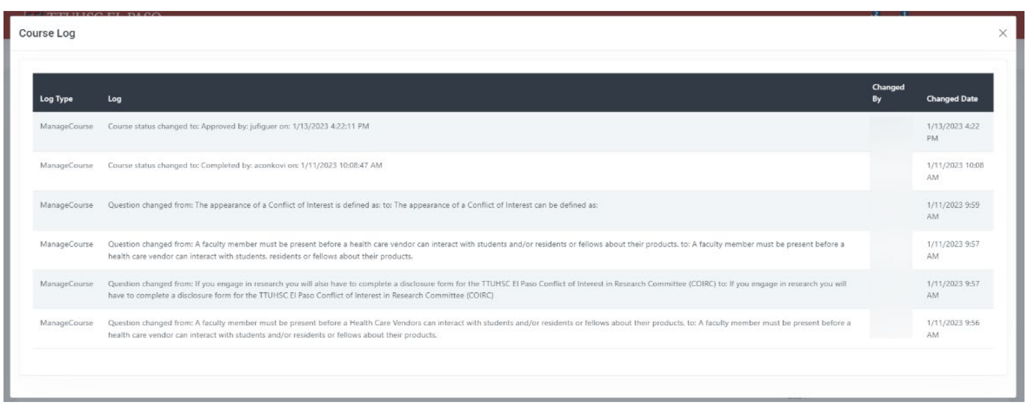
3) In the **Actions** column, you can select **View**, **Log or Cancel** buttons.

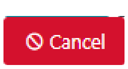


a) If you click on the **View** button, you will be able to look at detailed information entered in the **Mass Requirement**.



b) The **Log** button will show you the **Course Log**. This section will display the history of the **Mass Assignment**.

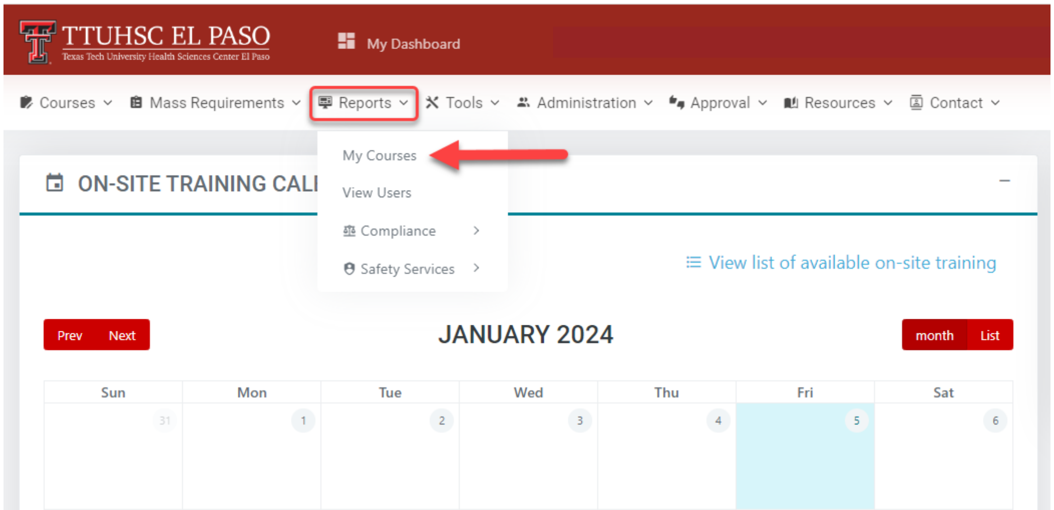


c) The  button will delete the mass requirement.

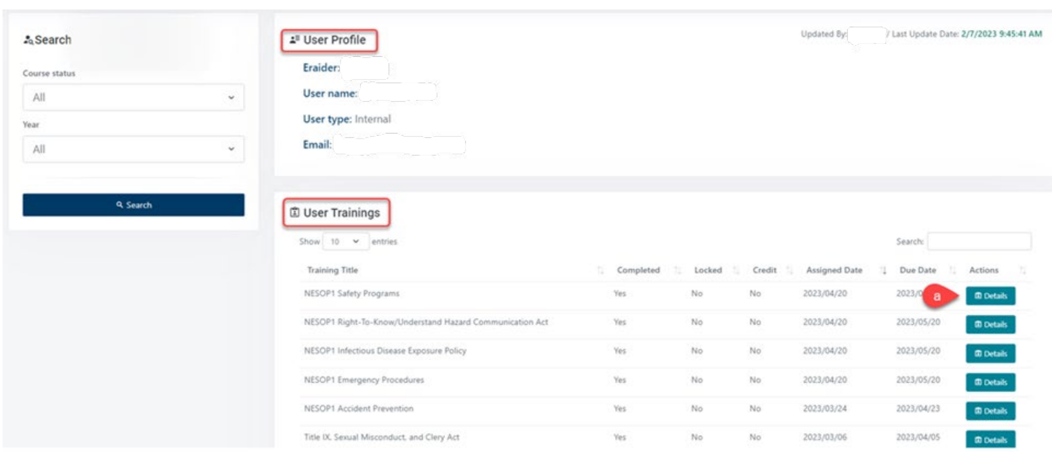
Back to Top

REPORTS – MY COURSES

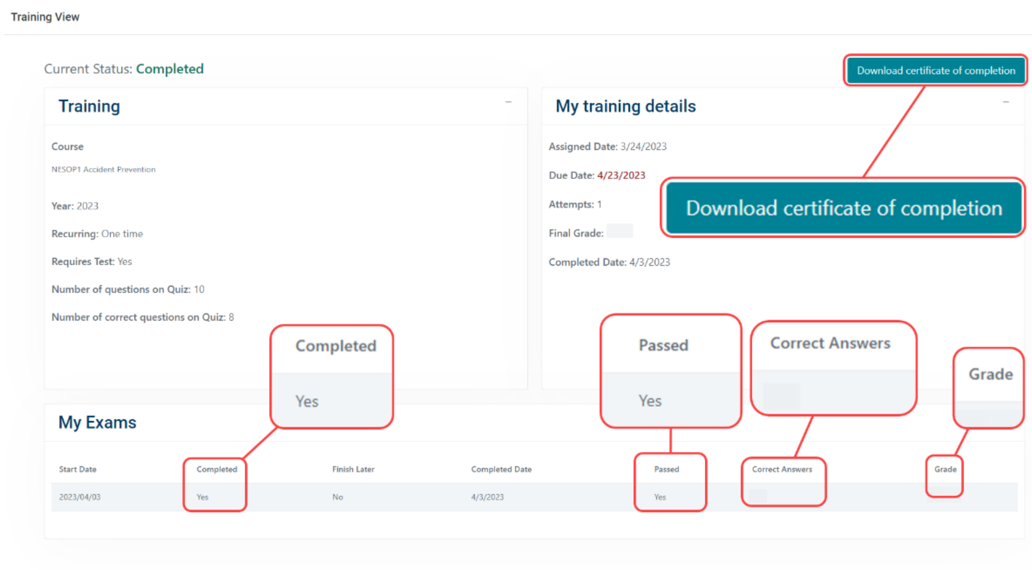
1) To check your profile and course status, click on **Reports** dropdown section, located on top of the page, then click on **My Courses**.



2) Next, you will see the following page. In this page you will find your personal information such as the **User Profile** and the **User Trainings**.

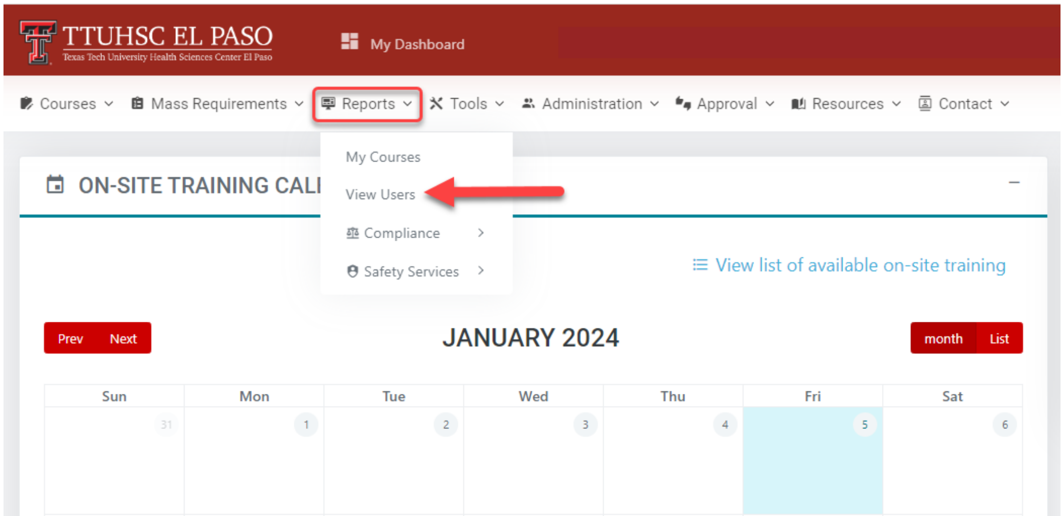


a) Under the **Details** button, you can get detailed information of the trainings you have been assigned. You can also **Download a certificate of completion**.

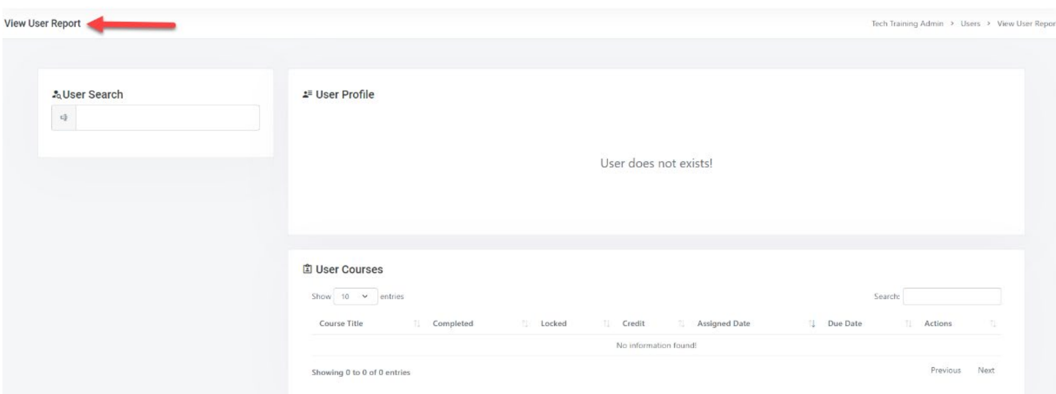


REPORTS – VIEW USERS

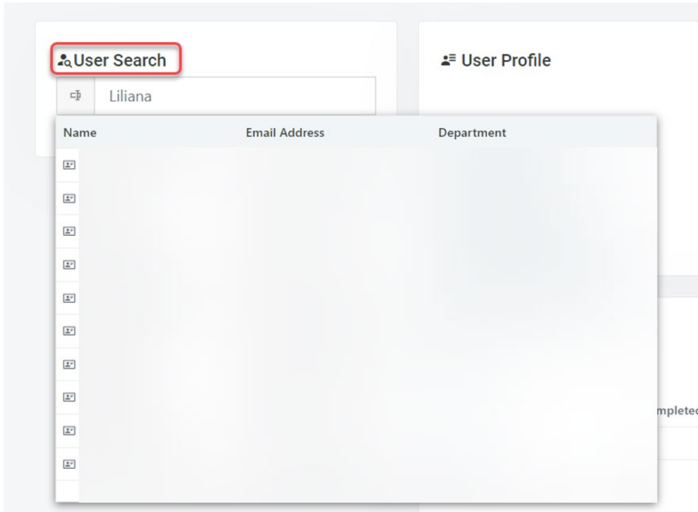
1) To search for users, click on **Reports** dropdown section, located on top of the page, then click on **View Users**.



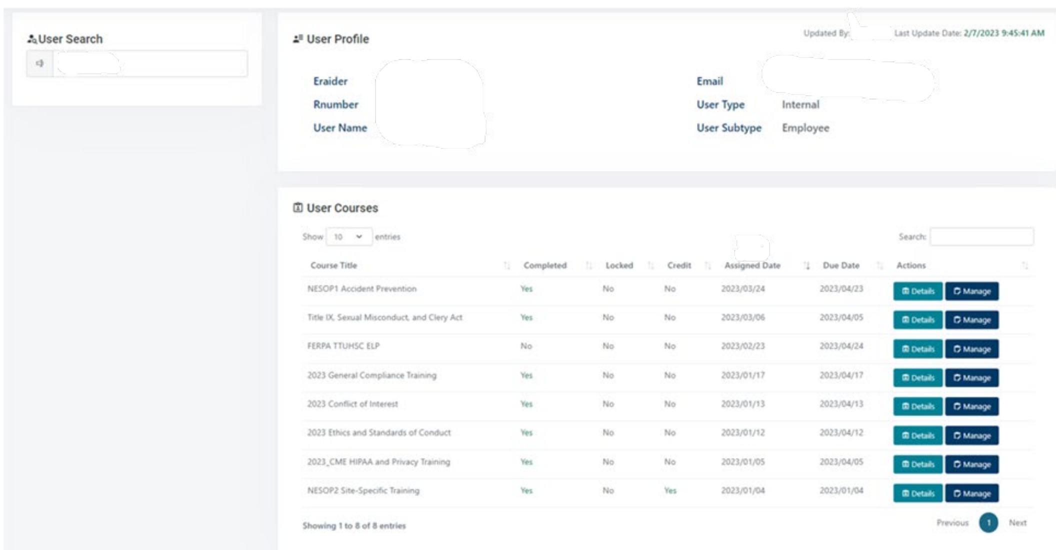
2) Next, you will find the **View User Report** page.



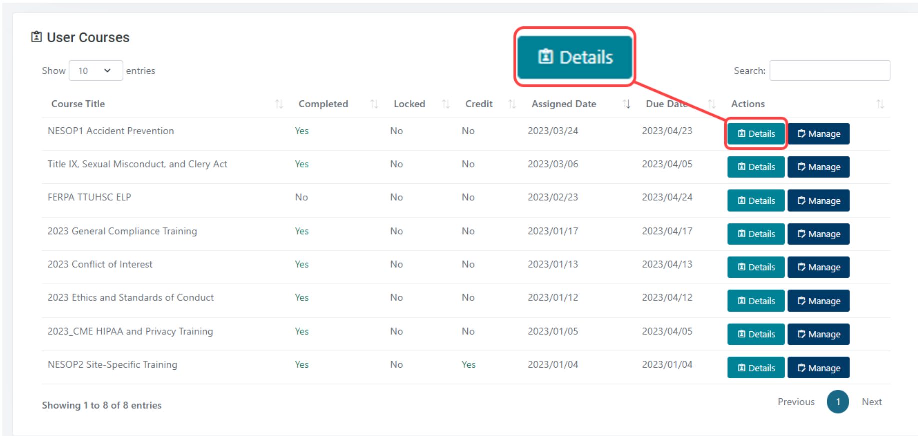
3) In the **User Search** section, you will be able to search for a specific user with their **eRaider, first name and/or last name**. A list of names will populate in a dropdown box.



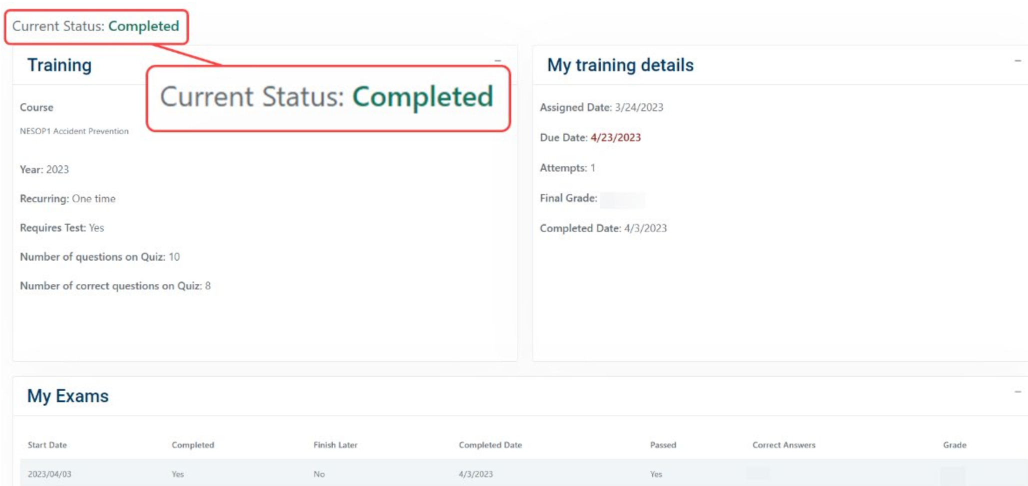
4) Select the name of the individual. The following page will display the **User Profile** and the **User Courses**.



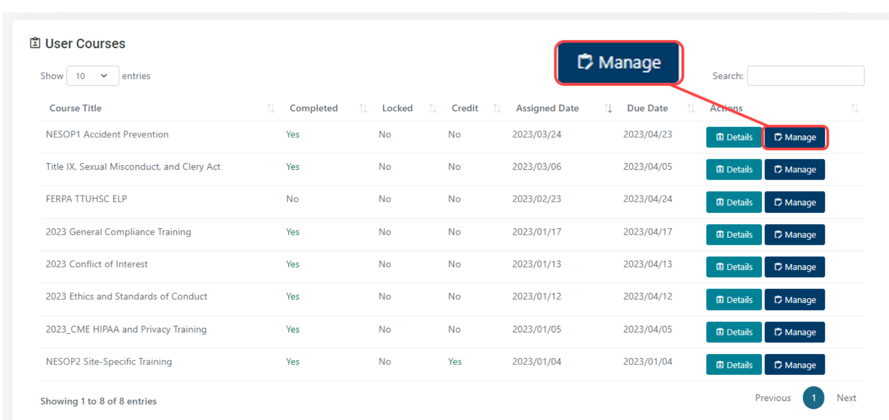
5) If you click on the **Details** button, it will direct you to the **View User Course Details** page.



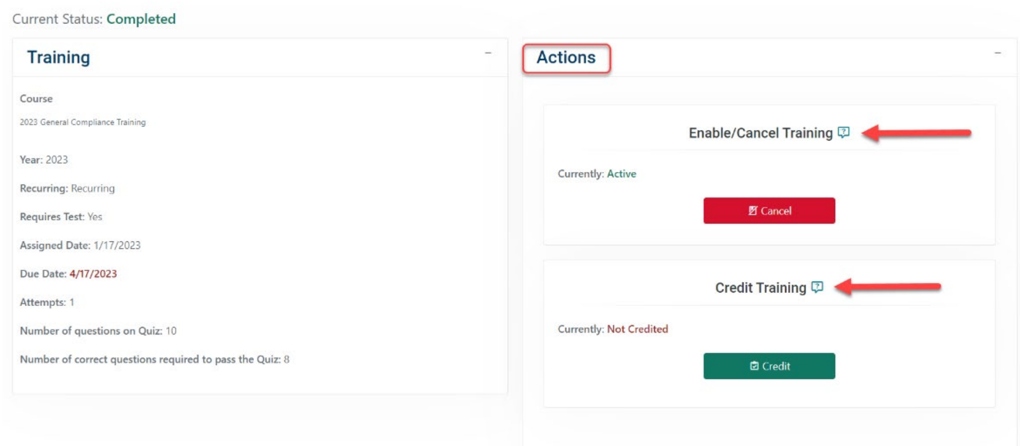
a) In this page you can see a detailed description of the trainings and exams the user has completed.



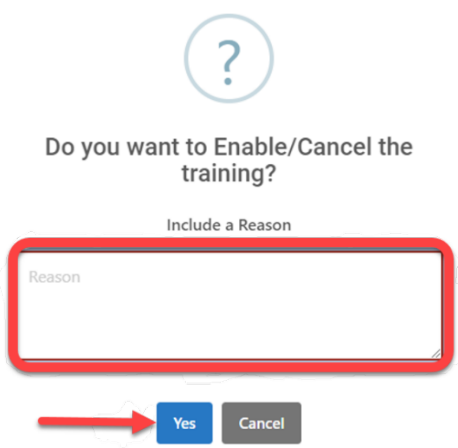
6) If you click on **Manage**, it will direct you to the **Manage User Course page**.



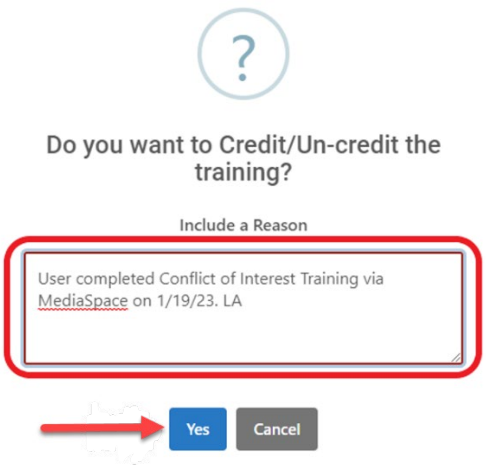
a) Under the **Actions** section, you will have two options, first you can **Enable/Cancel Training** and second, you can give credit to an individual by clicking on the **Credit Training** button.



7) **Enable/Cancel Training**: If you click on this section a pop-up screen will appear. You will have to give the reason you want to cancel the training. After you are finish, click **Yes.**

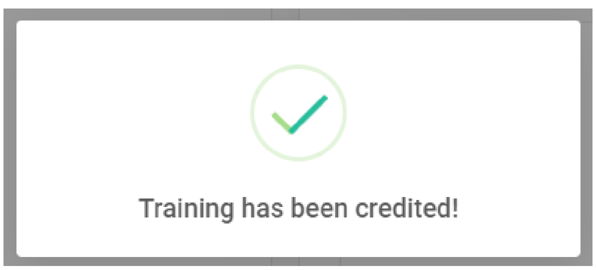


8) **Credit Training**: If you click on this section a pop-up message will appear. You will have to include a reason you want to give credit for the training. After you are finish, click **Yes.**

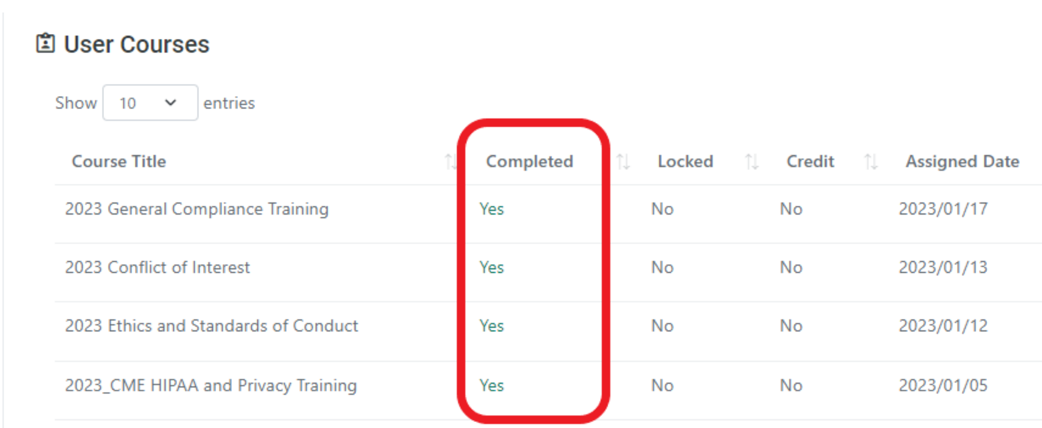


Note: Use the following template when including the reason; User completed (name of training) via MediaSpace or Canvas Catalog on (date). (Initials)"

a) Once you click on **Yes**, you will see the following pop-up notification.



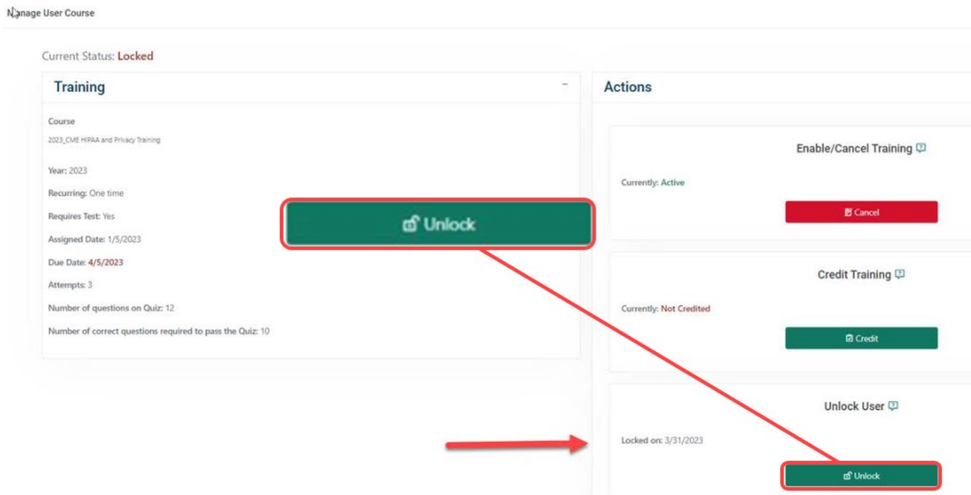
9) Next, under the **User Course** section you can verify if the credit was successfully applied to the training. Check for a **Yes** under the **Completed** section.


User Courses

Show 10 entries

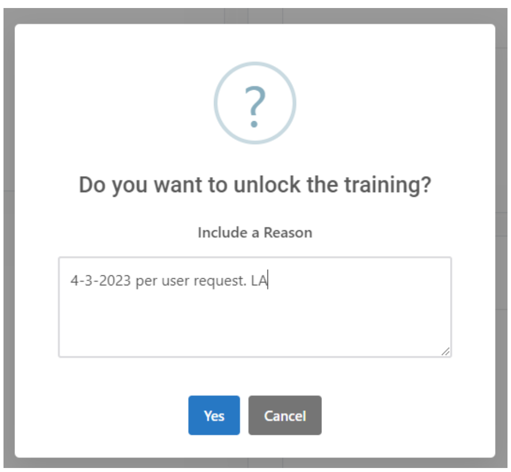
Course Title	Completed	Locked	Credit	Assigned Date
2023 General Compliance Training	Yes	No	No	2023/01/17
2023 Conflict of Interest	Yes	No	No	2023/01/13
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05

10) **Unlock User**: This option will display if the user has used all their attempts and has not successfully passed the test, or if the user ran out of time. Click **Unlock**.

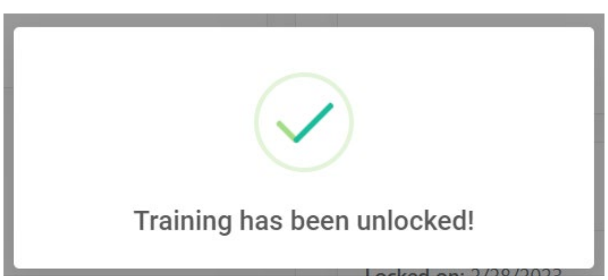


a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel**, if you made a mistake. Click **Yes** when you are ready.

- Make sure you enter a brief message before confirming **Yes**.



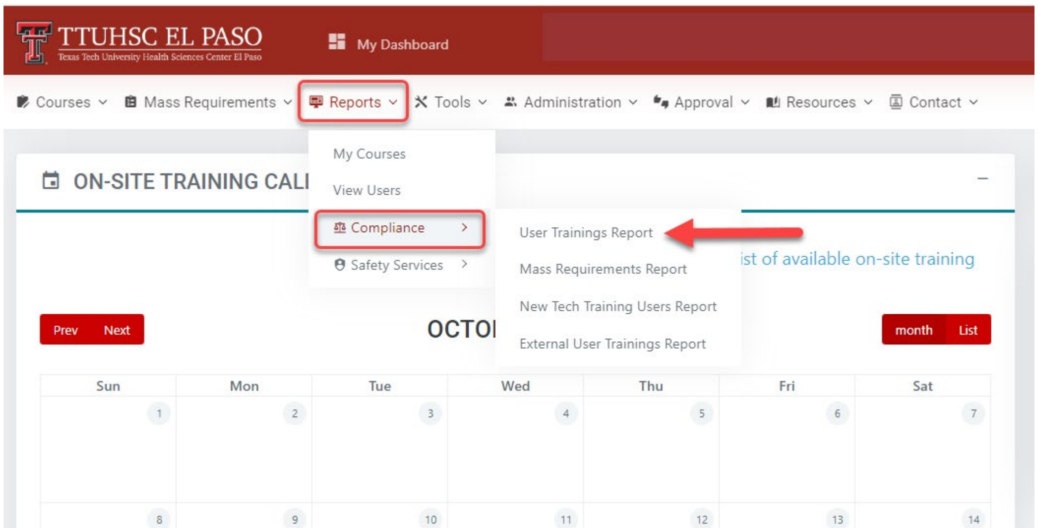
b) After you have clicked **Yes**, a pop-up notification will appear to confirm. You can go back to the **View User Report** to make sure the user was unlocked.



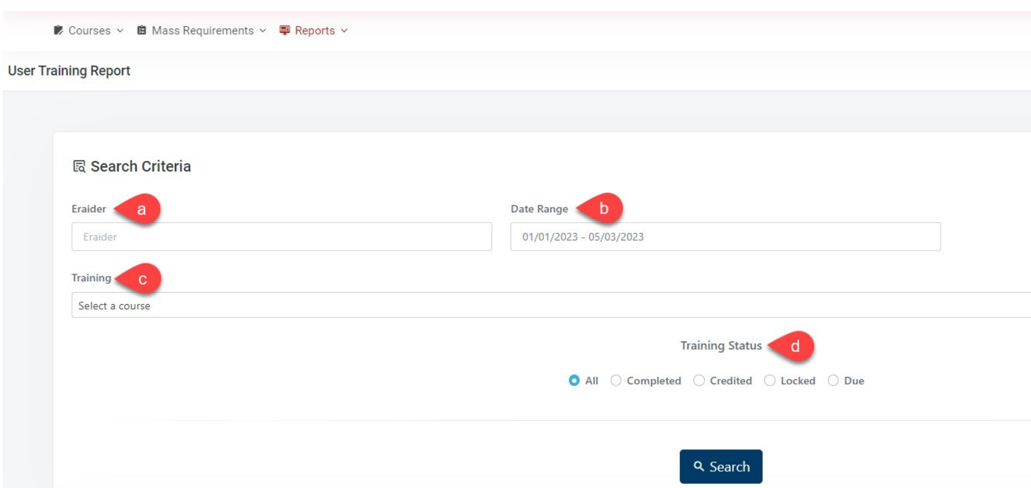
REPORTS – COMPLIANCE USER TRAININGS REPORT

The **User Training Report** will yield training completion information for all active users in Tech Training. The report includes the following fields: id, training, r number, eRaider, full name, email, termination date, start date, due date, course active, completed, credited, locked, attempts, grade, completed date, department, college, and position.

1) To pull a **User Training Report**, click on the **Reports** dropdown → **Compliance** → then click on **User Trainings Report**. You will see the following screen:

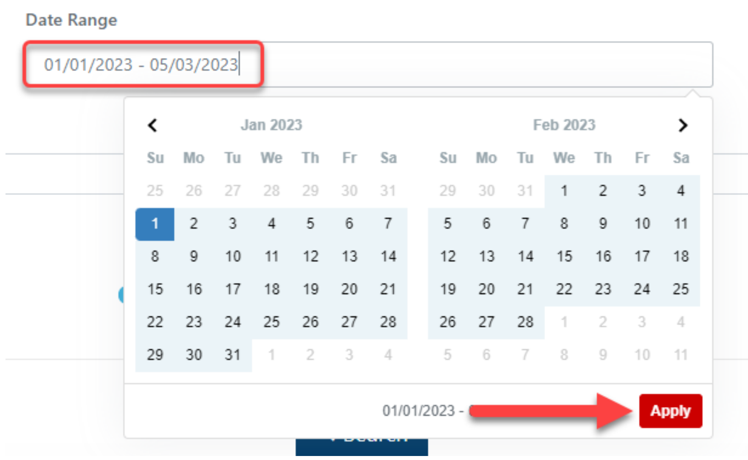


2) You will be redirected to the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

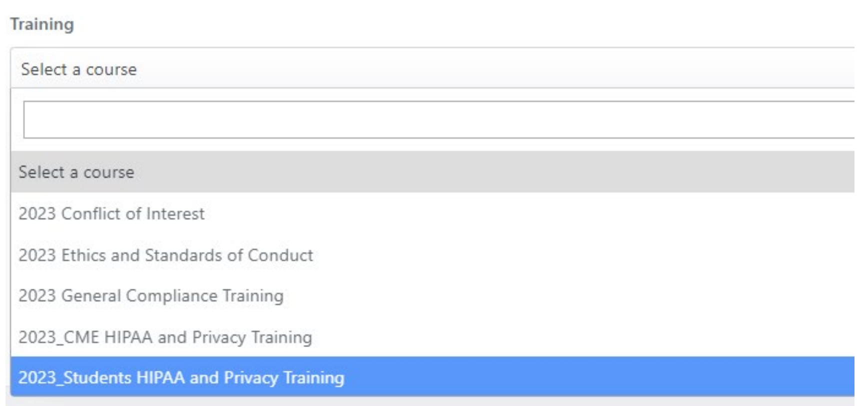


a) **eRaider** – Enter the **individual's eRaider**. If you need to pull a report for all users, leave this field blank.

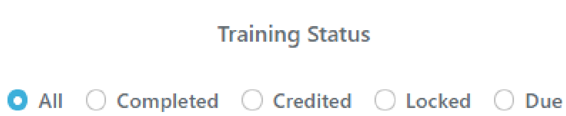
b) **Date Range** – Click on this section to select the specific **date range** you need. Once you have selected the correct dates, click on the **Apply** button.



c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.

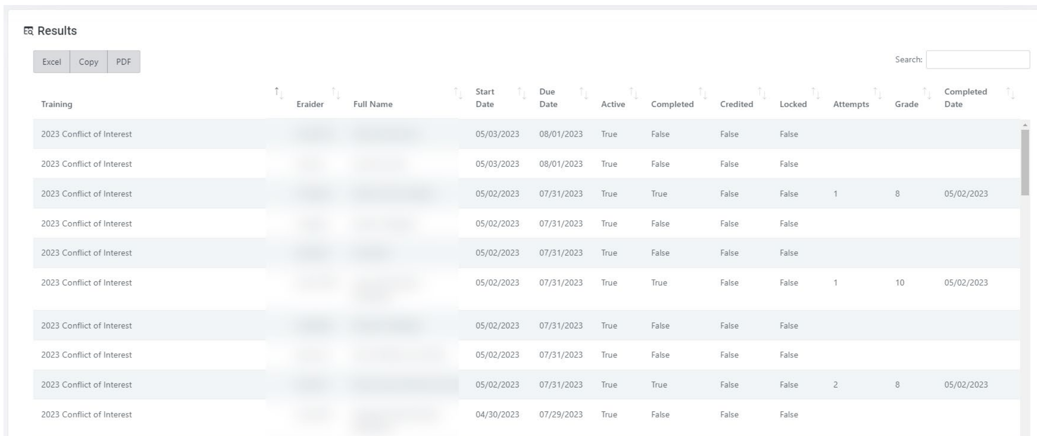


d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, click on the radio button **All**.



3) Once you have completed all the fields, click on the  button.

4) When you click **Search**, the report will populate in the **Results** section at the bottom of the screen.



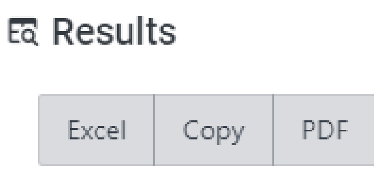
Results

Excel | Copy | PDF

Search:

Training	Eraider	Full Name	Start Date	Due Date	Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	8	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	10	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	2	8	05/02/2023
2023 Conflict of Interest			04/30/2023	07/29/2023	True	False	False	False			

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

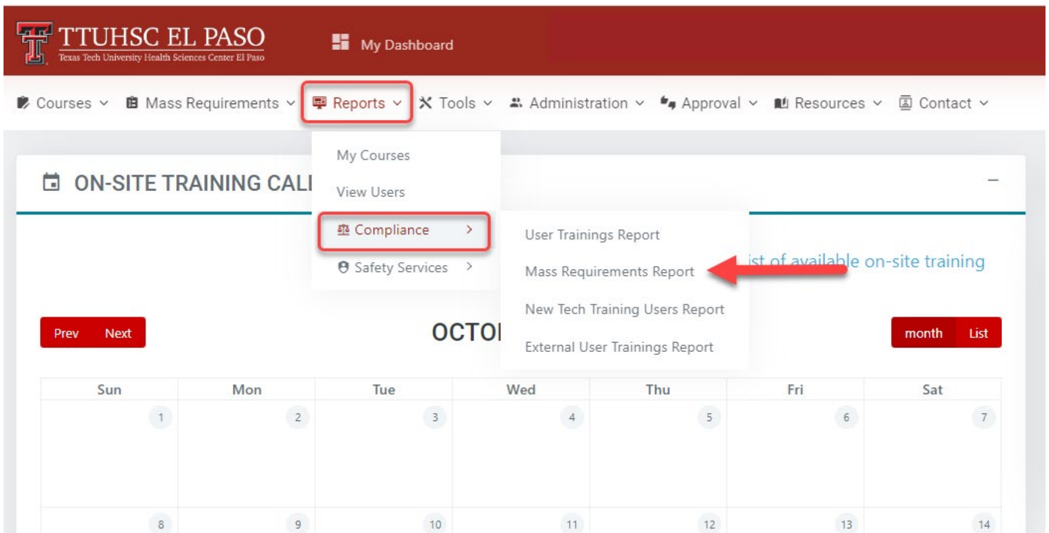


6) Once you have downloaded your report, save the **User Training Report** to your desired location.

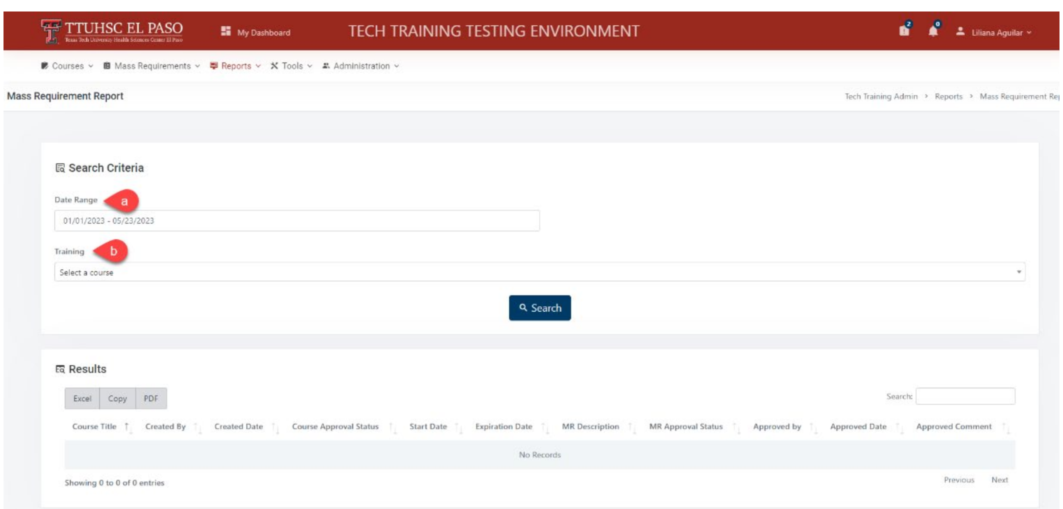
REPORTS – COMPLIANCE MASS REQUIREMENTS REPORT

The **Mass Requirements Report** will yield training course information for all course that have been uploaded into Tech Training. The report includes the following fields: course title, created by, created date, course approval status start date, expiration date, MR description, MR approval status, approved by, approved date and approved comment.

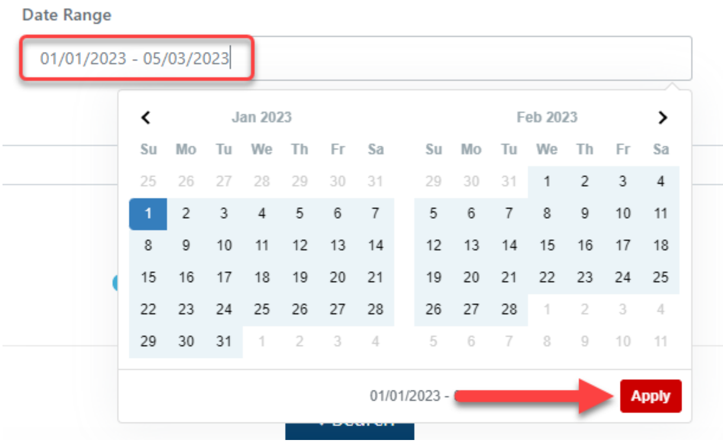
1) To pull a **Mass Requirements Report**, click on the **Reports** dropdown → **Compliance** → then click on **Mass Requirements Report**.



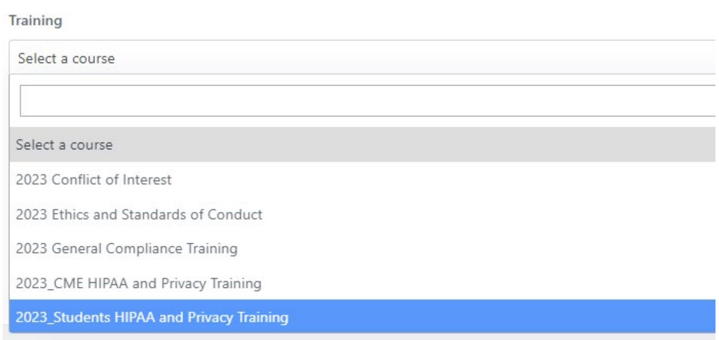
2) When you click on **Mass Requirement Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

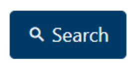


a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.



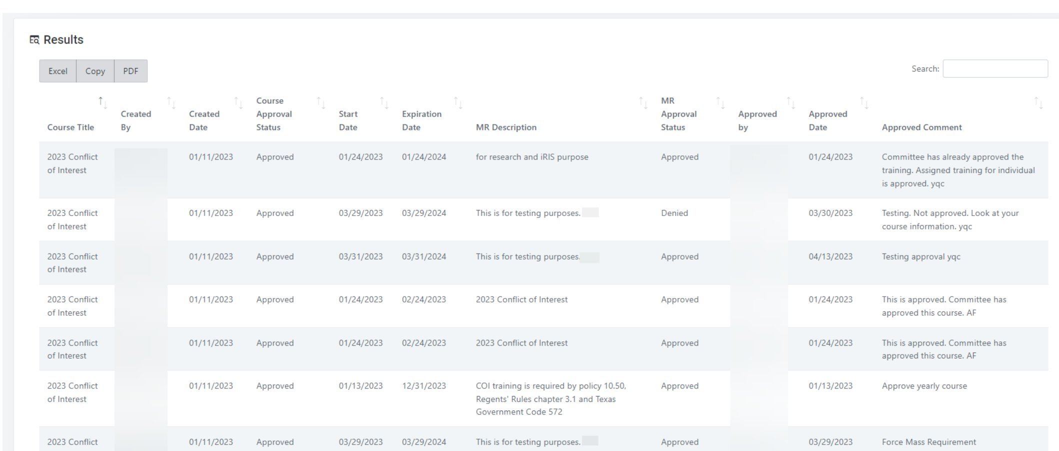
b) **Training** – you will need to select a course in the **Training** field dropdown. If you need to pull a report that shows all training courses, you may leave this field as **Select a course**.



3) Once you have completed all of the required fields, click on the 

button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.



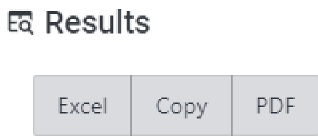
Results

Excel Copy PDF

Search:

Course Title	Created By	Created Date	Course Approval Status	Start Date	Expiration Date	MR Description	MR Approval Status	Approved by	Approved Date	Approved Comment
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	01/24/2024	for research and iRIS purpose	Approved		01/24/2023	Committee has already approved the training. Assigned training for individual is approved. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Denied		03/30/2023	Testing. Not approved. Look at your course information. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/31/2023	03/31/2024	This is for testing purposes.	Approved		04/13/2023	Testing approval yqc
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/13/2023	12/31/2023	COI training is required by policy 10.50, Regents' Rules chapter 3.1 and Texas Government Code 572	Approved		01/13/2023	Approve yearly course
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Approved		03/29/2023	Force Mass Requirement

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.



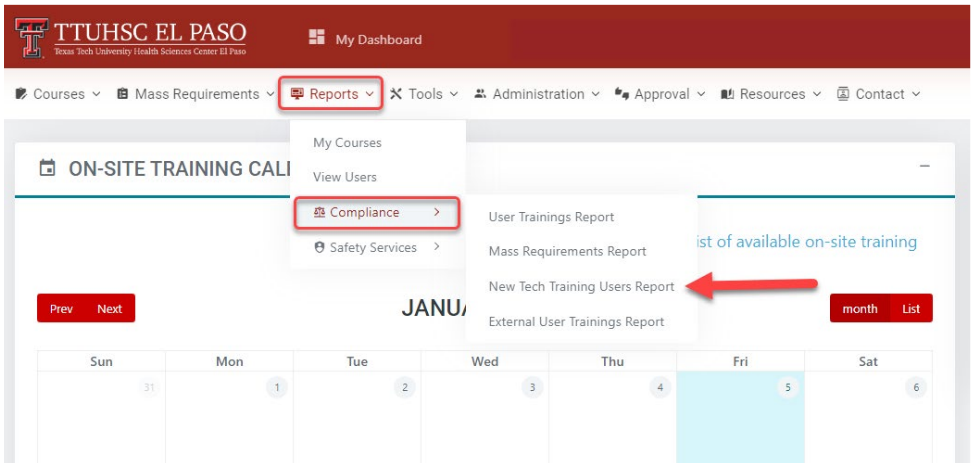
6) Once you have downloaded your report, make sure to save the **Mass Requirement Report** to your desired location.

Back to Top

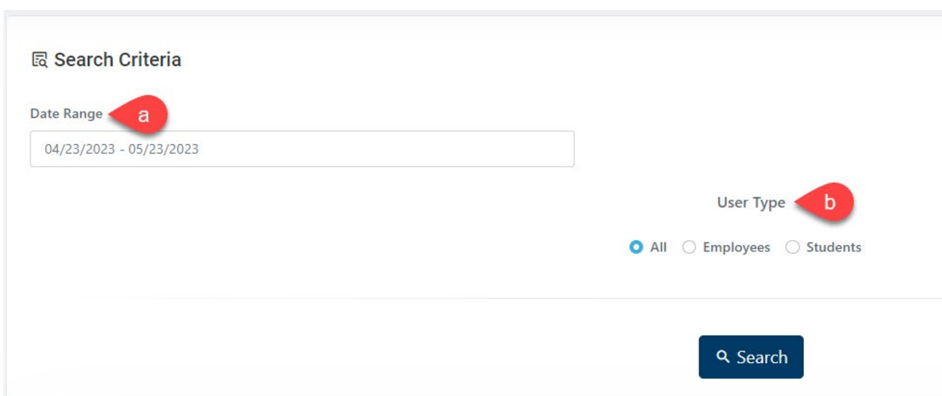
<u>**REPORTS – COMPLIANCE NEW TECH TRAINING USERS REPORT**</u>

The **New Tech Training Users Report** is utilized to check how many persons have been hired by date range.

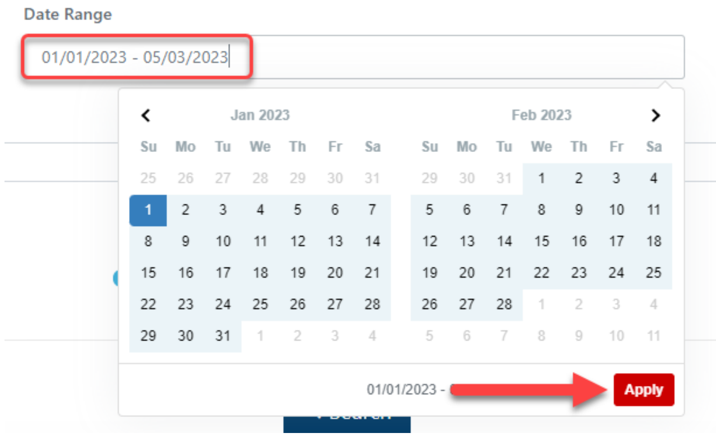
1) To pull a **New Tech Training Users Report**, click on the **Reports** dropdown → **Compliance** → then click on **New Tech Training Users Report**.



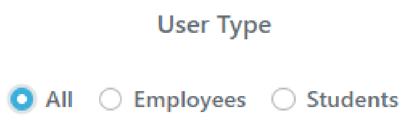
2) When you click on **New Tech Training Users Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:



a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

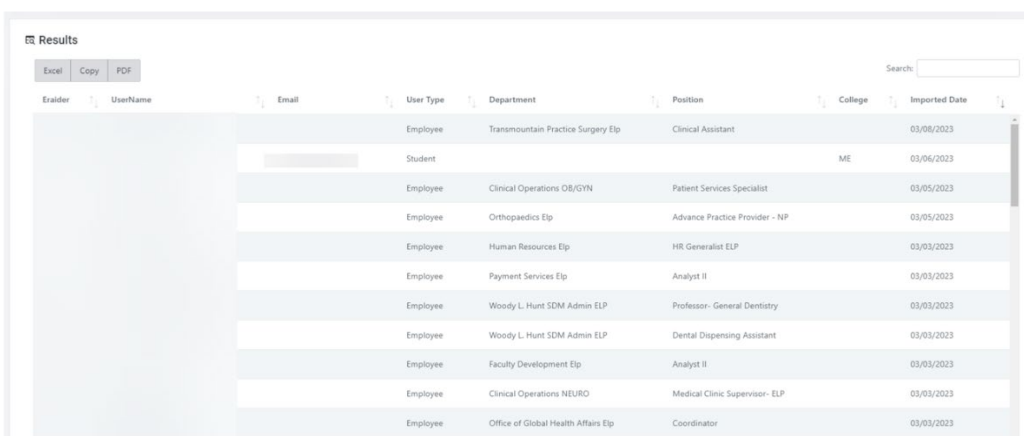


b) **User Type** – If you want to see a specific User Type, select either All, Employees or Students.

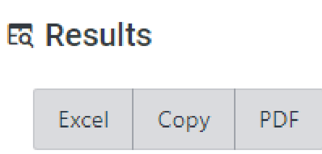


3) Once you have completed all of the required fields, click on the  button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.



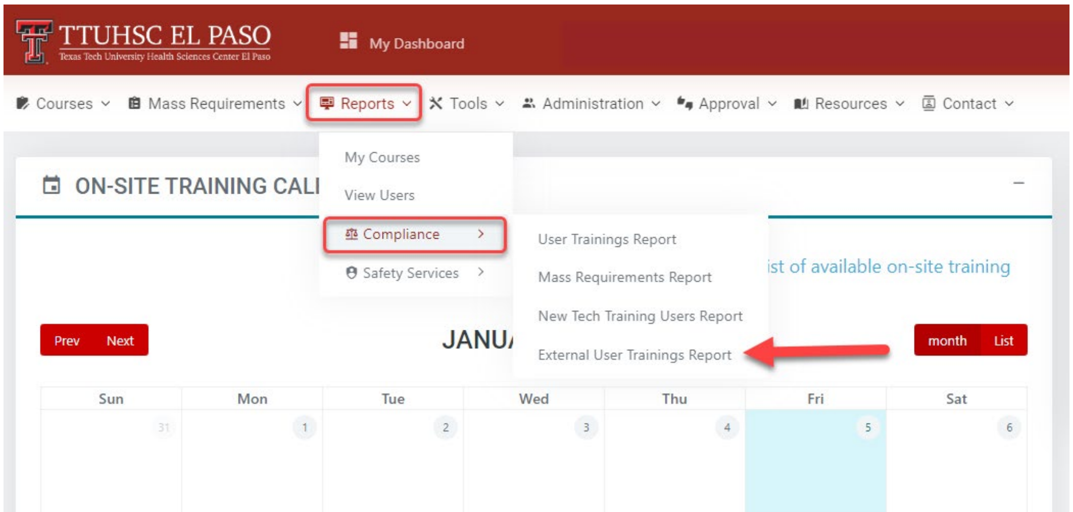
5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.



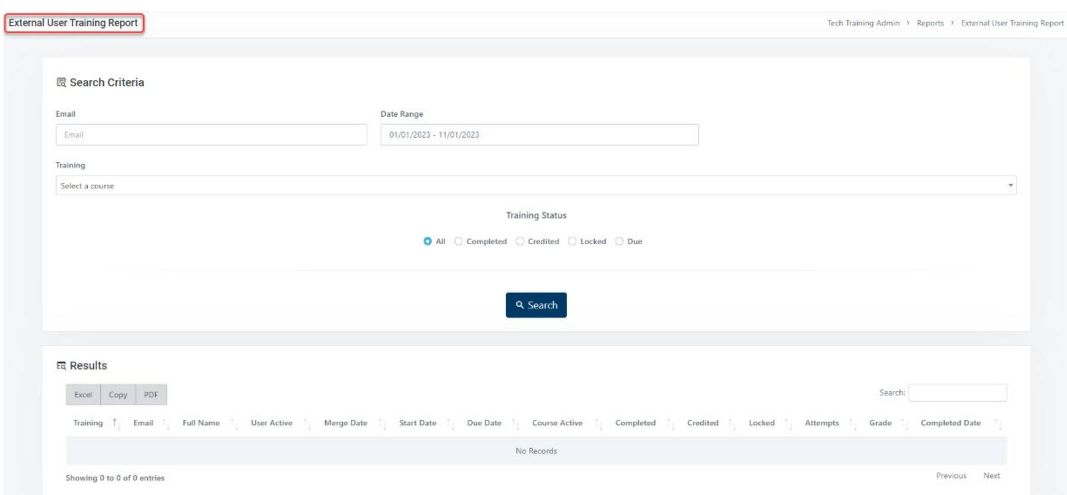
REPORTS – COMPLIANCE EXTERNAL USER TRAININGS REPORT

The External User Trainings Report will show the user the training information for the External Users.

1) To download the External Users Training Report, go to the **Reports** tab at the top of the page > **Compliance** and click on **External User Trainings Report.**



2) This will take you to the **External User Training Report** page.



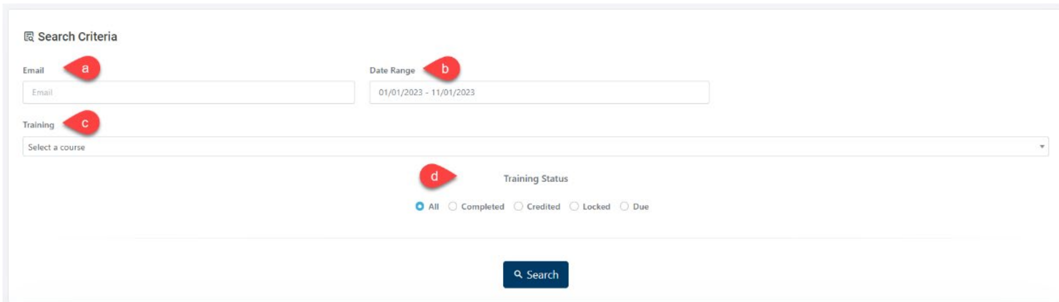
3) In the **Search Criteria** section, fill out the following fields:

   a) **Email** – Enter the **individual's personal email**. If you need to pull a report for all users, leave this field blank.

   b) **Date Range** – Select the desired date range.

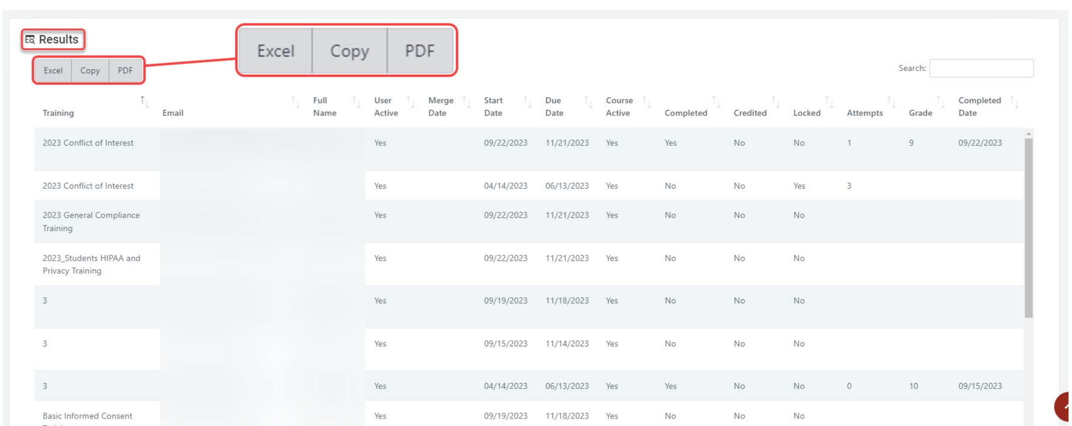
c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course.**

d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.



4) After you have filled out all the fields, click on the  button.

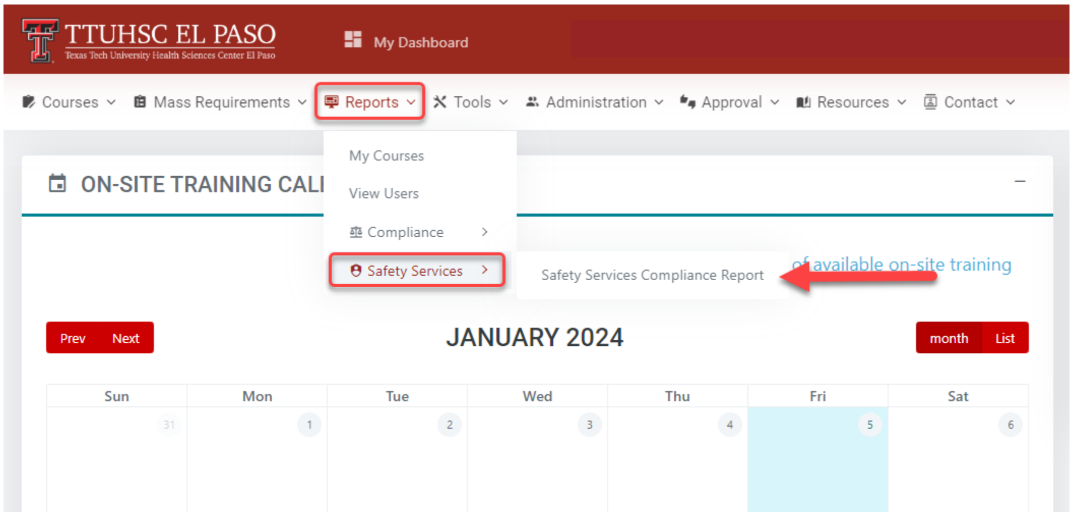
5) The **Results** section will populate with all the External User Trainings information. Click on the **Excel**, **PDF** or **Copy** option to download or save the report.



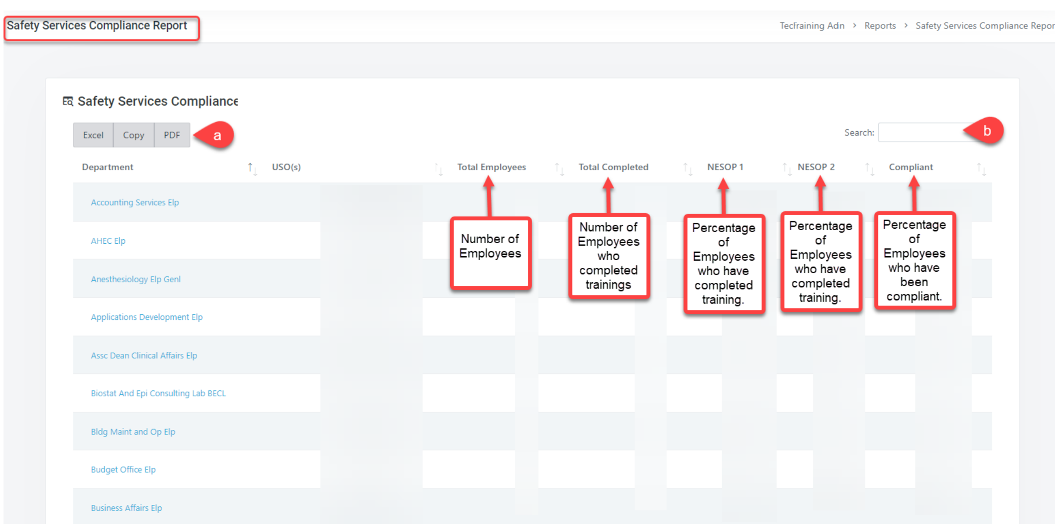
REPORTS – SAFETY SERVICES COMPLIANCE REPORT

For more information on Safety Services content, please contact the Safety Services department at safetyserviceselp@ttuhsc.edu or call 915-215-4823.

1) Go to the **Reports** dropdown, click **Safety Services** and go to **Safety Services Compliance Report.**



2) Next, you will see the **Safety Services Compliance Report** screen.



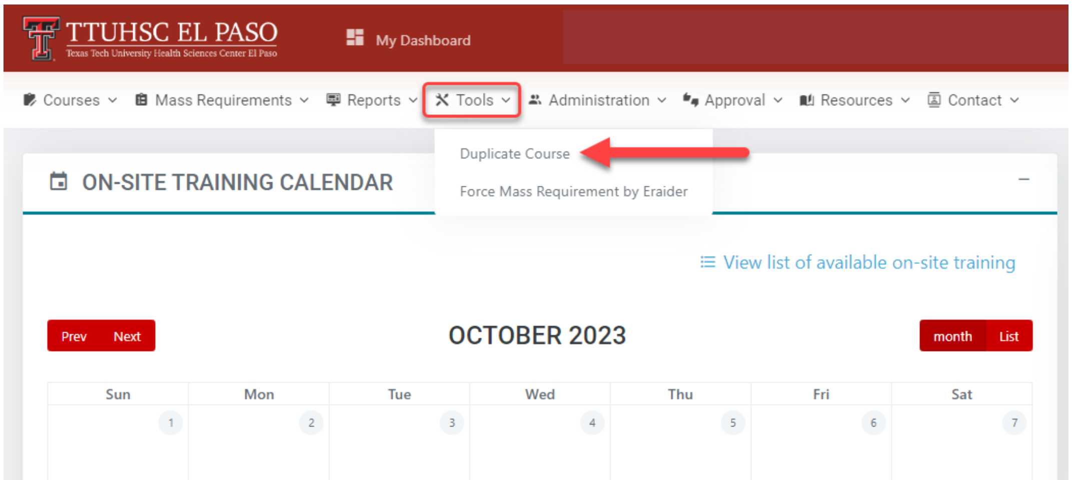
a) In this section, you will have the option to export the document into **Excel** or **PDF** or **Copy** the document.

b) You have the **Search** bar where you can look up a department by its name.

TOOLS – DUPLICATE COURSE

The Duplicate Couse feature assists in creating a course by replicating a previously approved course. The user will not need to recreate it; however, the course will require committee approval once submitted.

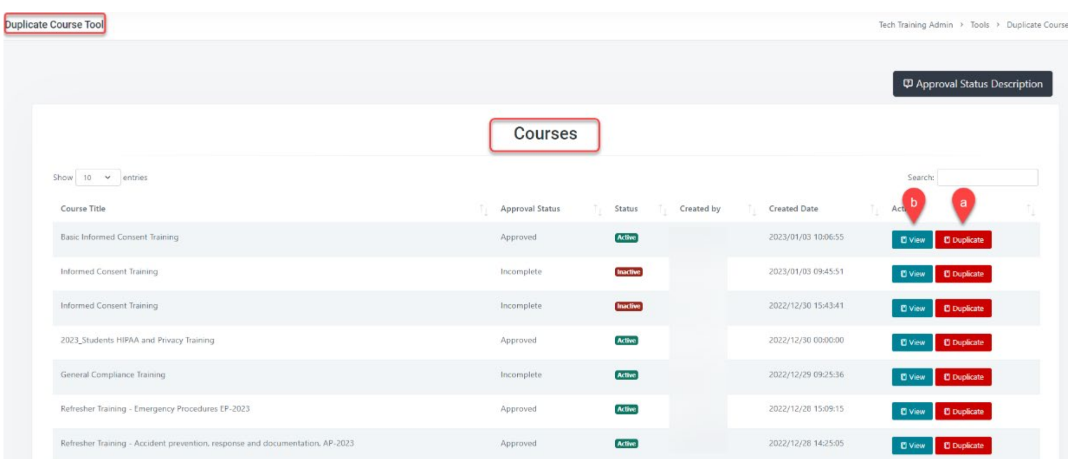
1) Go to the **Tools** dropdown at the top of the page and click on **Duplicate Course.**



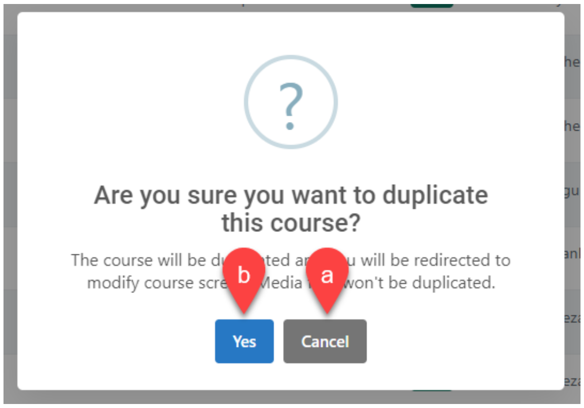
2) This will take you to the **Duplicate Course Tool** screen. A list of **Courses** will appear.

a) Look for the one training you want to duplicate and click on **Duplicate**.

b) You can click on **View** to see the details of the course.

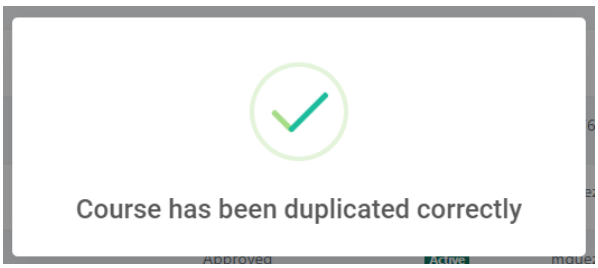


3) Next, the following pop-up box will appear:



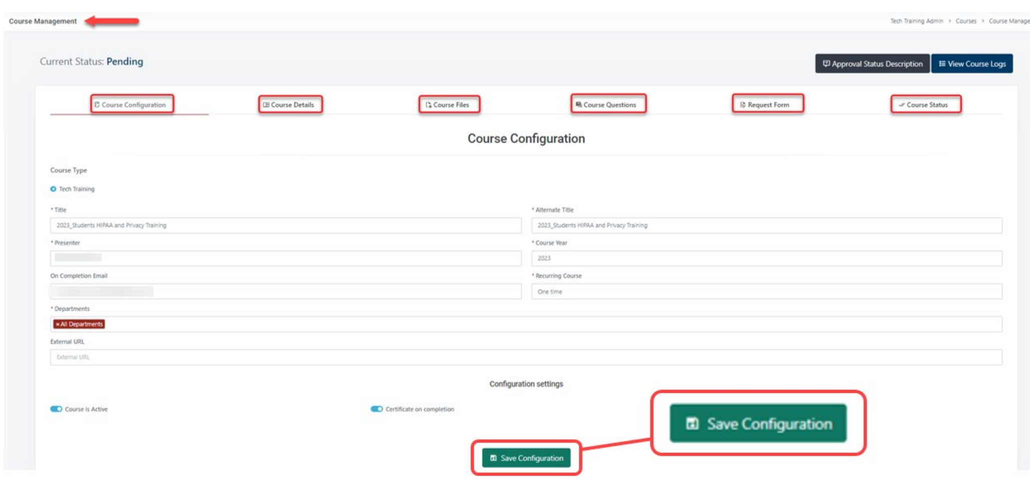
a) To go back to the **Duplicate Course Tool** screen click **Cancel**.

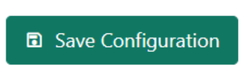
b) If you want to proceed click **Yes**. You will see the following pop-up notification:



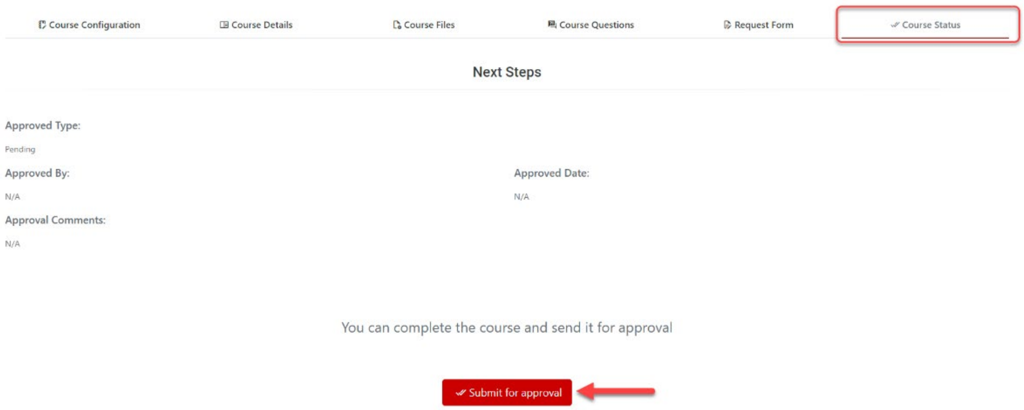
4) Next, you will see the **Course Management** screen. Follow the steps under the **Create a Course section Add**.

5) Start making the changes for the duplicate course. You can click on the **tabs** to continue.



Note: Do not forget to click on the  *button after completing each section.*

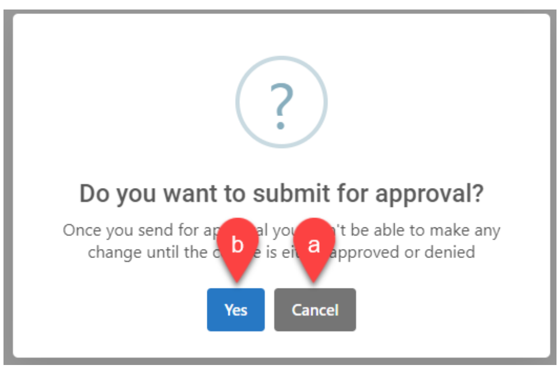
6) Once you are at the **Course Status** tab and you are finished making changes, click on the **Submit for approval** button.



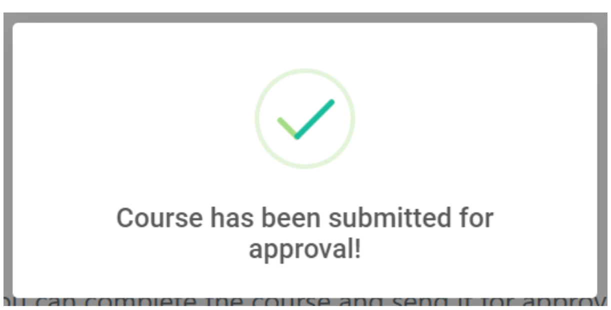
7) A pop-up box will appear.

a) Click **Cancel** if you want to stay on **Course Management** screen.

b) Click **Yes** if you are ready to submit for approval.



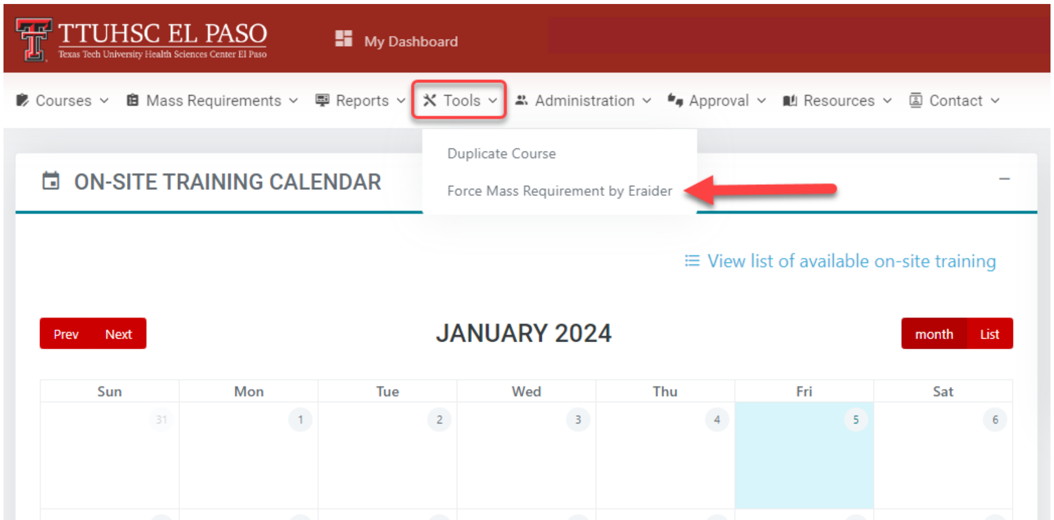
8) A pop-up box will appear confirming that the course was submitted for approval.



TOOLS – FORCE MASS REQUIREMENT BY ERAIDER

1) Go to the **Tools dropdown** and click **Force Mass Requirement by eRaider.**

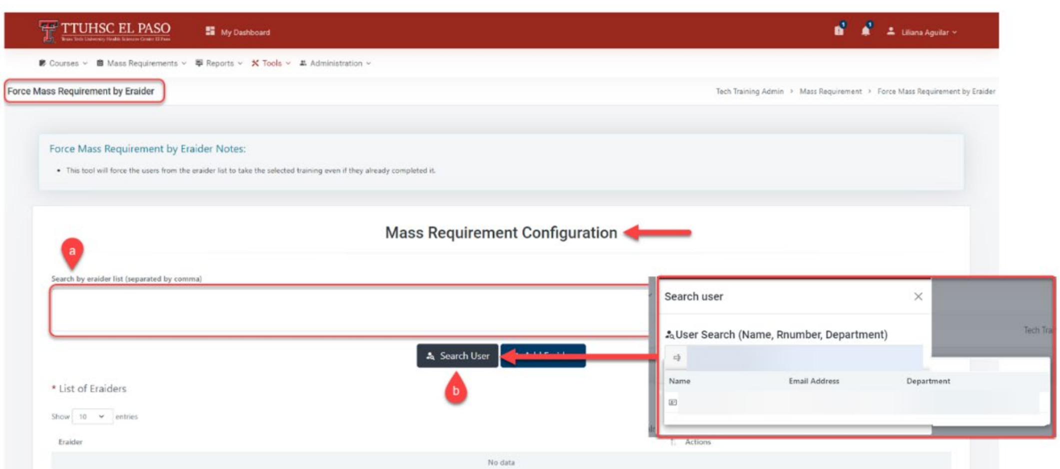
   Note: This feature will assign/reassign the training course to the users selected even if the user has already completed the training.



2) This will take you to the **Force Mass Requirement by eRaider** screen.

3) Under the **Mass Requirement Configuration** section, in the **Search by eRaider list** box, type the individual(s) eRaider(s). Then press the Add Eraiders button.

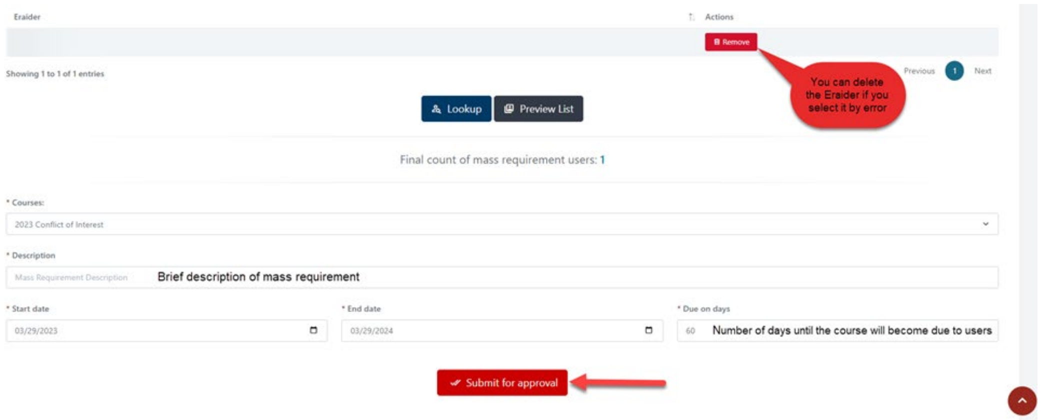
   a) If you do not know the eRaider, click on **Search User** button and type the individual(s) name(s). This field will populate a list of names. Click on the desired name(s).



4) Next, click on the 

button. This will indicate the number of individuals that will have the training assigned. It also activates the request.

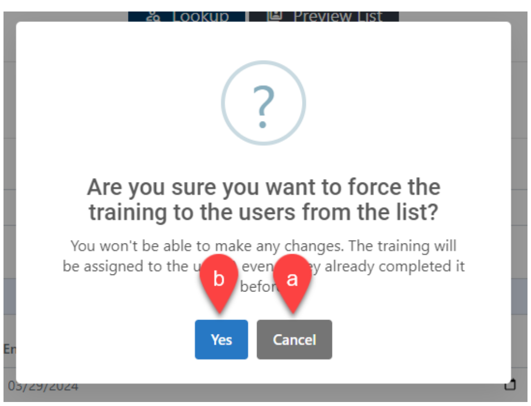
5) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Submit for approval**.



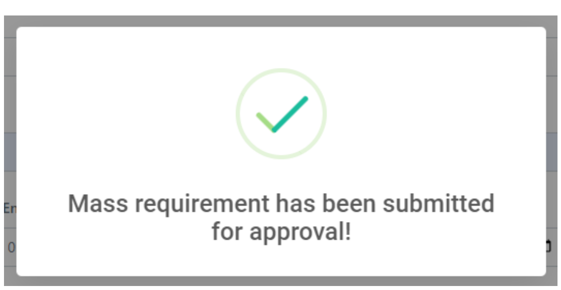
6) Next, a pop-up window will appear.

a) Click **Cancel** to stay on **Mass Requirement Configuration** section.

b) Click **Yes** to proceed.



c) When you click **Yes**, a pop-up notification will appear to confirm your submission.



<u>ADMINISTRATION – MANAGE USERS</u>

1) In the Tech Training application, some users will be assigned a different **User Type** depending on their department, role, and job duties:

   - **Administrator role** – user will have full access to all of the functions. The administrator will be able to modify the role for any user.

   - **Committee role** – user will be able to review/approve new training courses and mass requirements.

     - Only the **Administrator** and **Committee roles** can be selected together.

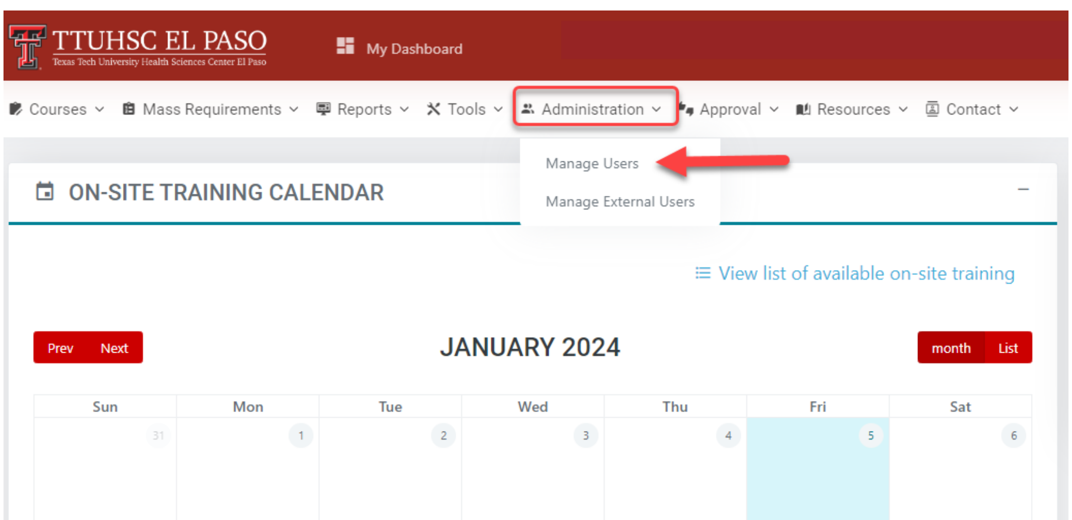
   - **Power User role** – will only let user create courses only for the selected departments.

   - **Wiki Admin role** – will allow the user to create or modify wiki content for any website in Texas Tech.

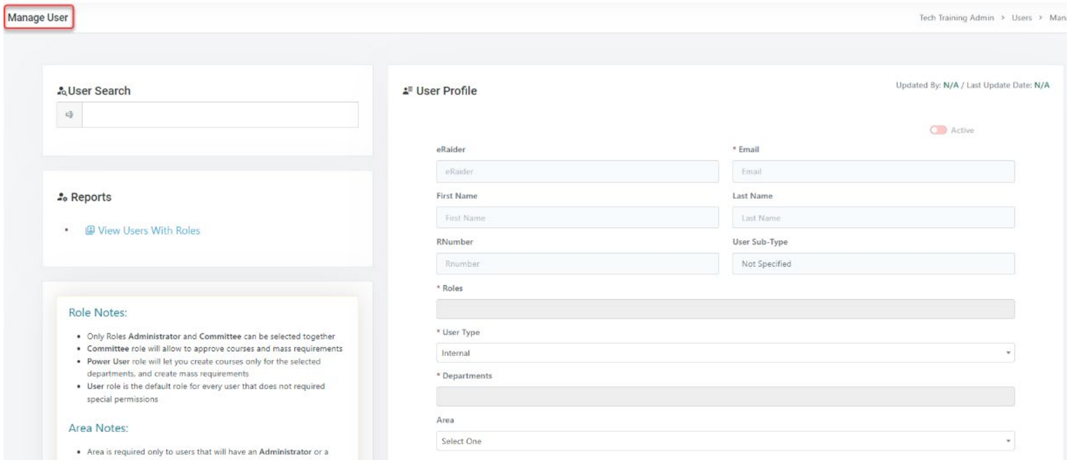
   - **User role** – is the default role for every user that does not require special permissions.

   Note: Area is required only to users that will have an Administrator or a Power User Role. Depending on the area selected some extra features will appear so be careful when assigning an area.

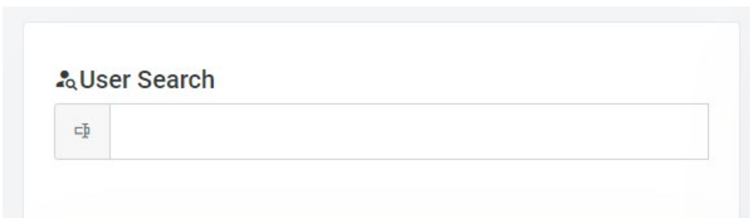
2) To manage/edit a user's role, go to the **Administration dropdown** and click **Manage Users.**



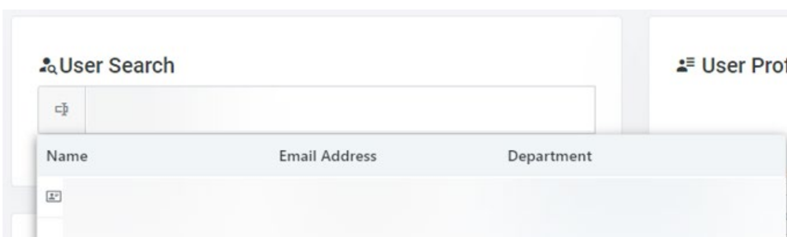
3) This will take you to the **Manage User** screen.



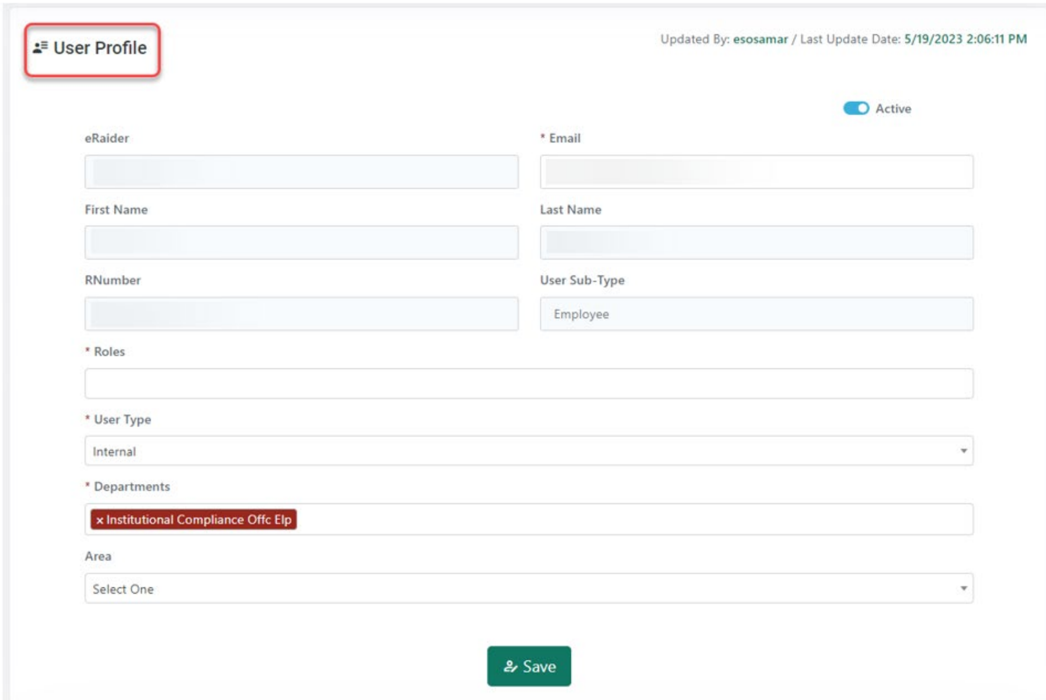
4) To search for a user, click on the **User Search** bar on the left side of the screen.



a) Next, you will need to type in the name or eRaider of the individual you are searching for. A dropdown menu will populate where you can select the individual by clicking on their name.

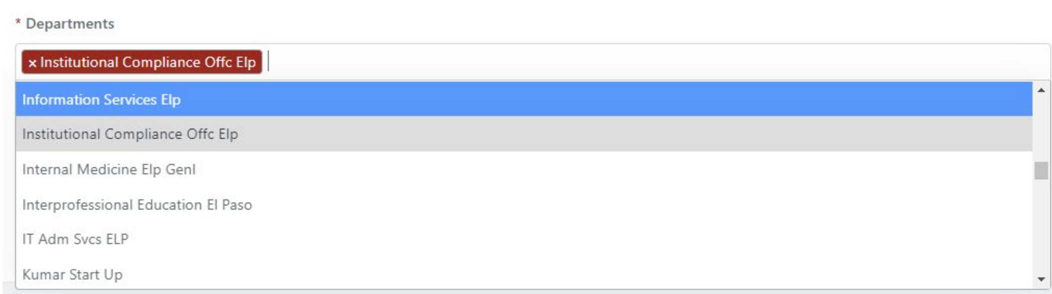


5) When you click on the individual's name, their information and role will be populated on the right side in the **User Profile** section.

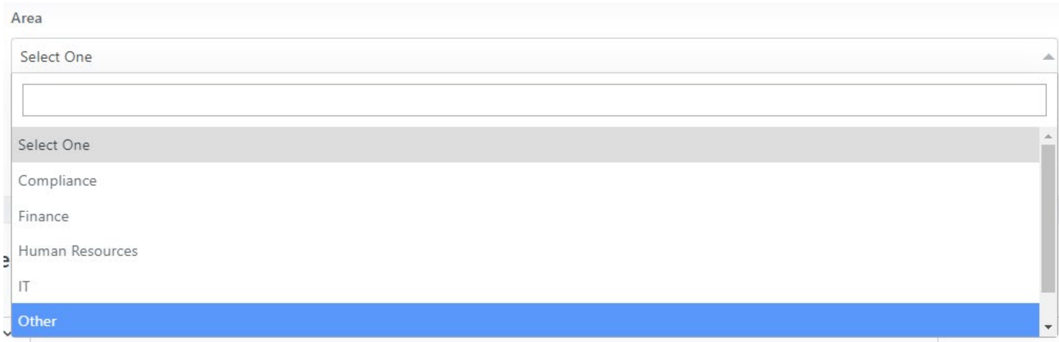


6) Click on the **Roles** section. There will be a dropdown menu of all of the available roles. To add a role for the user, click on role needed. The roles selected will appear in this section (in dark red).

7) Click on **Departments** section to change the department. There will be a dropdown menu of all available departments. Click on department needed.

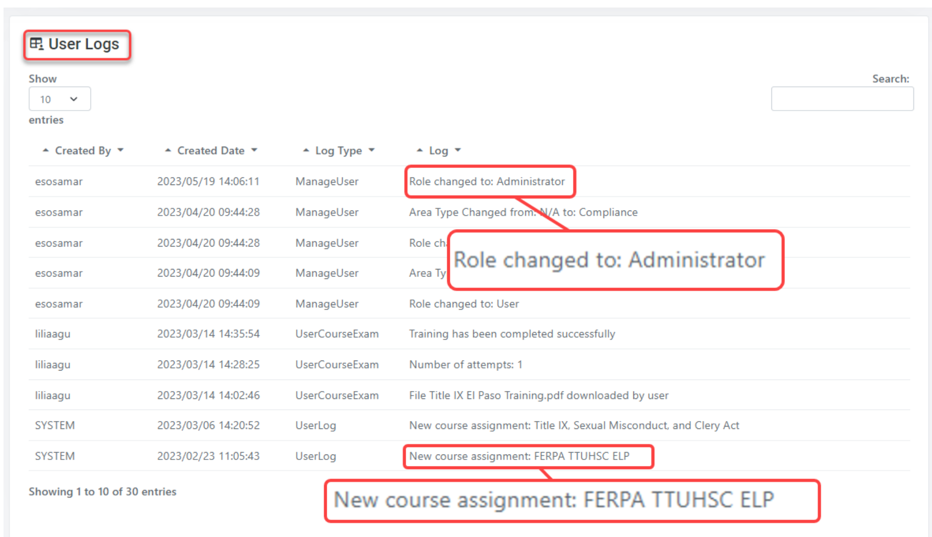


8) Click on **Area** to assign the user a specific area. A dropdown box will appear with the available options.



9) Once you have selected the new role(s), department and area that apply, click on the Save button at the bottom of the **User Profile** section.

10) Next, scroll down the page in the **User Logs** section. You will see a history of the user's roles, training that has been assigned, as well as any changes that have been made.

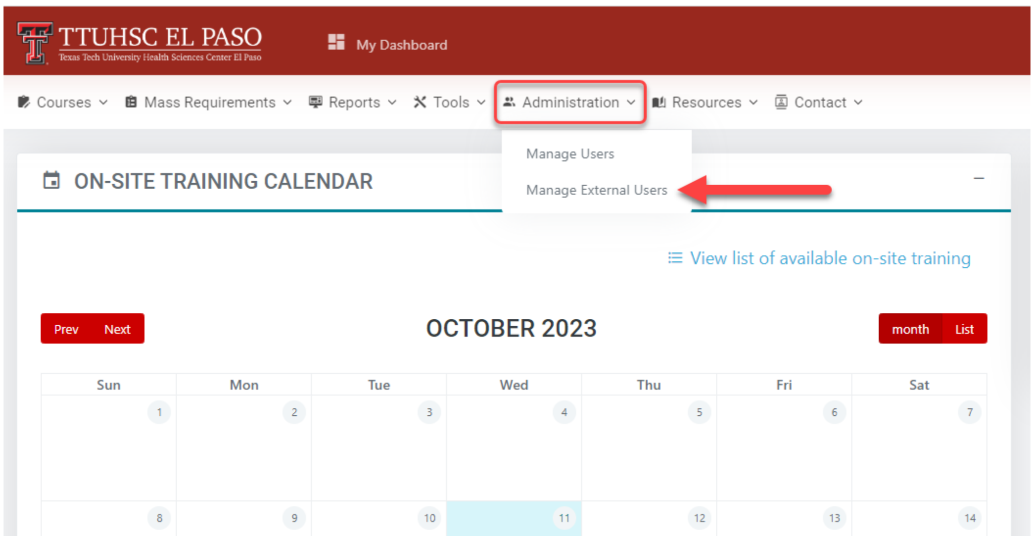


ADMINISTRATION – MANAGE EXTERNAL USERS

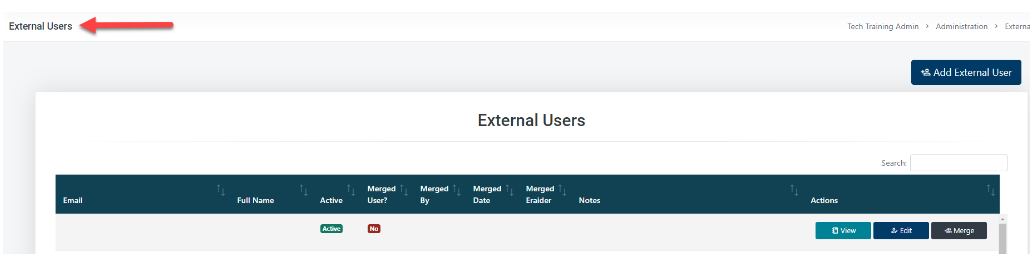
This function will allow you to add an external user (such as staffing agency employees, volunteers, or future faculty that are in the onboarding process), assign courses to the user, and merge the user with an existing TTUHSC EP eRaider account.

Note: The person creating the profile will need to be provided with detailed user information (user full name, personal email, department and trainings that need to be assigned).

1) Go to the **Administration dropdown** and click **Manage External Users.**



2) Next, you will see the External Users screen.



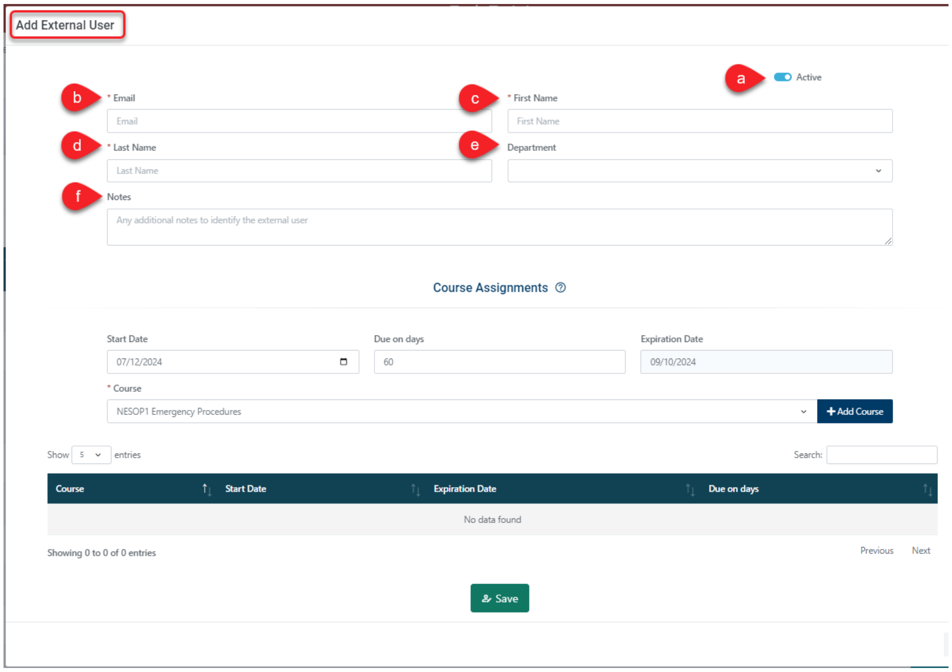
3) In the **External Users** page, you will have the following options: **Add External User**, **View**, **Edit**, or **Merge**.

4) To add an external user, click on the 

button.

5) This will take you to the **Add External User** page. Fill out the required information fields in the section at the top of the screen.

Note: Required fields are identified by an asterisk (*).



a) **Active** – This will make the user active/inactive. Make sure the toggle button is blue.

b) **Email** – Enter the personal email that the user provided or an email the user has access to.

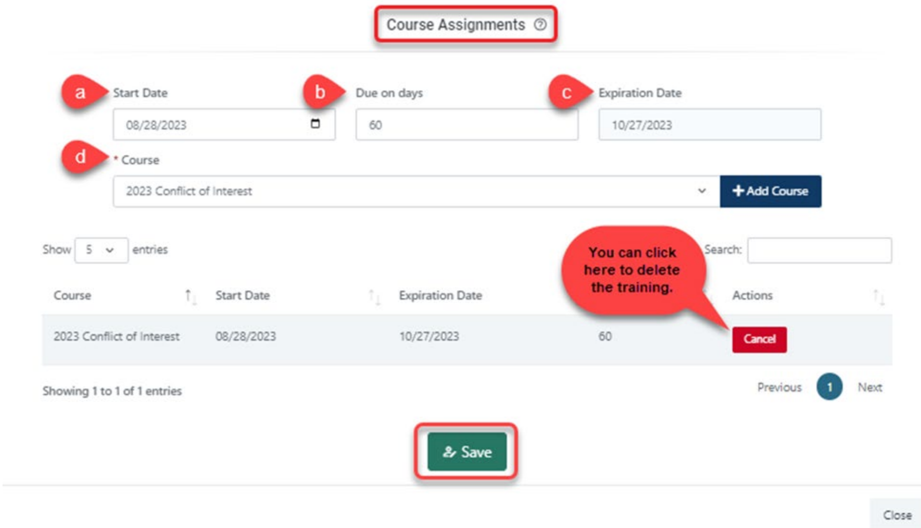
c) **First Name** – Enter the user's full first name.

d) **Last Name** – Enter the user's full last name.

e) **Department** – Scroll down in the dropdown field to select the correct department.

f) **Notes** – Enter the staffing agency or any relevant notes that pertain to this user.

6) Next, you will go to the **Course Assignments** section at the bottom of the screen. Fill out the required fields.



a) **Start Date** – Enter the date the course is being assigned.

b) **Due on days** – Enter the number of days the course will be available to the user.

c) **Expiration Date** – This date will self-populate based on the Due on days.

d) **Course** – Click on the dropdown menu and select the course you need to assign.

7) Once you have completed the required fields, click on the 

button.

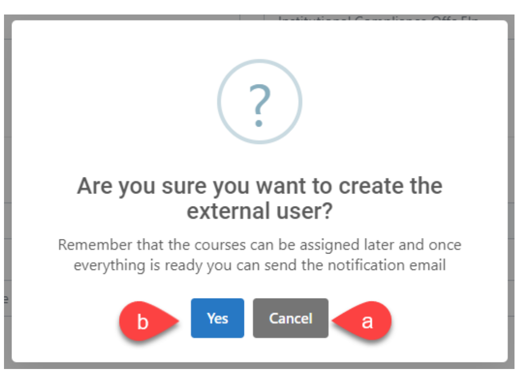
8) If multiple courses need to be assigned, follow steps #6 and #7.

9) When you have finished adding the external user's information and assigning the course(s), click **Save**.

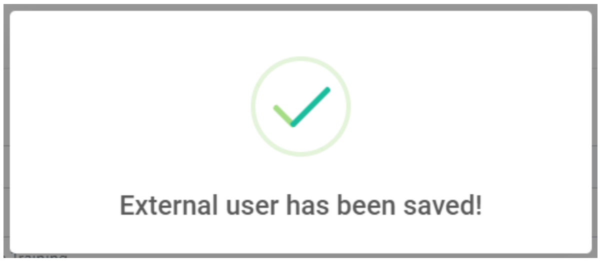
10) Once you click on the **Save** button, you will see the following pop-up notification:

a) Click **Cancel** to stay on **Add External User** screen.

b) Click **Yes** to proceed.

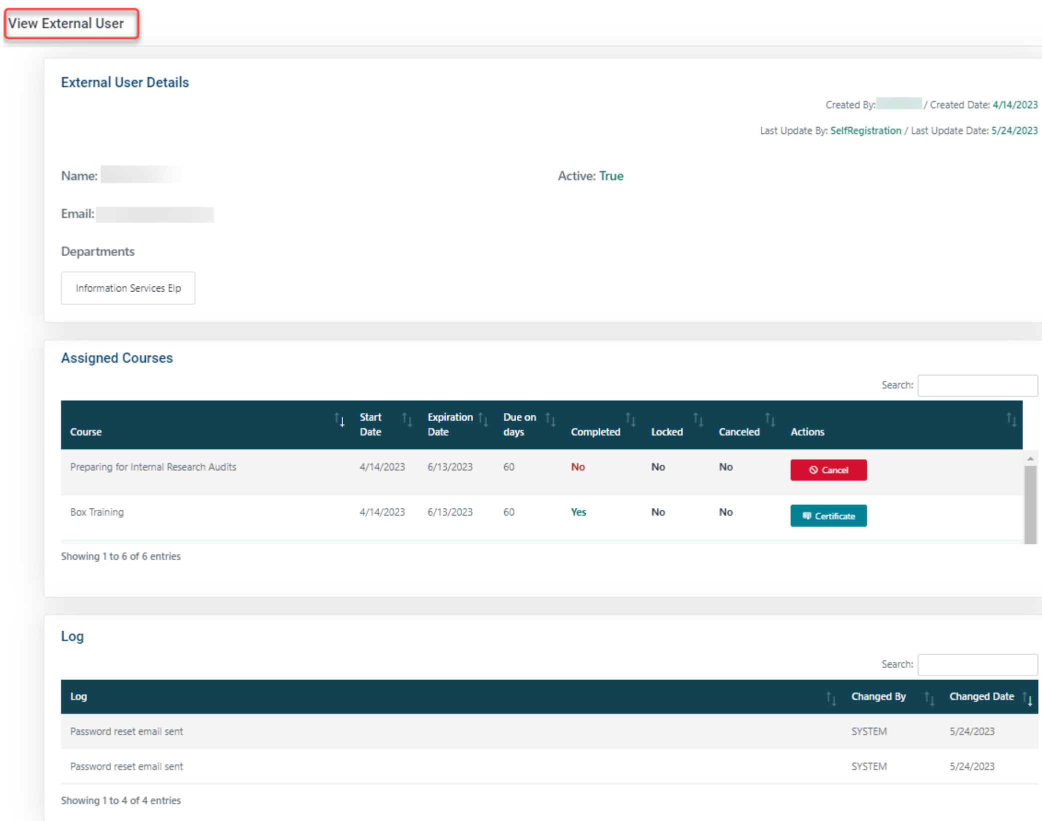


11) Once you click **Yes** you will see a pop-up notification confirming the user profile has been created and trainings assigned.

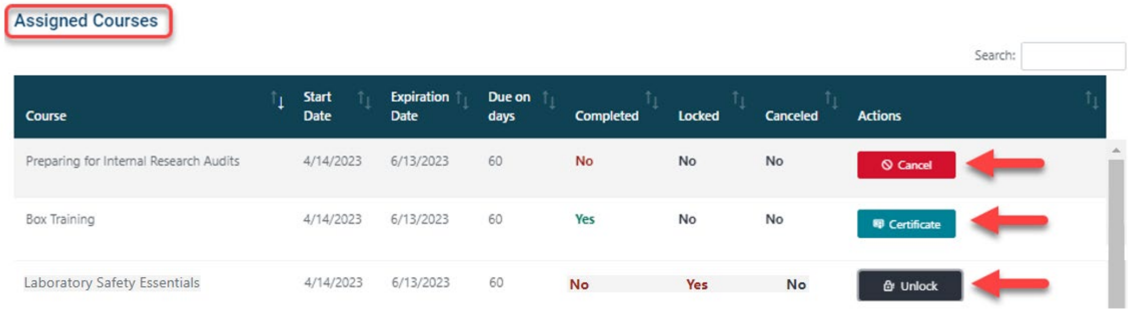


12) If you click on the 

button in the **External Users** screen, this will take you to the **View External User** screen. This screen will display the user's information as well as all courses that have been assigned to that user.

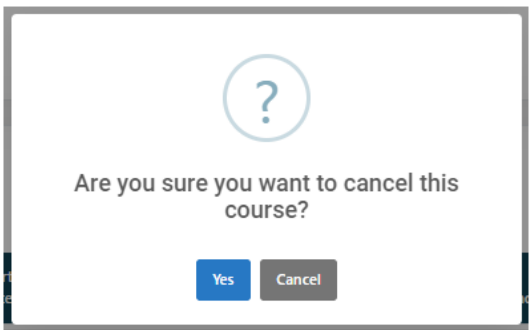


13) In the **Assigned Courses** section, you will have the option to **Cancel** a training assignment, **unlock** a training, or print a **Certificate of Completion** for the user.



14) The **Cancel** option will allow you to cancel a training for the user. Please note that the training can only be canceled if the user has not completed the course.

a) If you click on the **Cancel** button in the **Actions** column you will see the following pop-up notification:

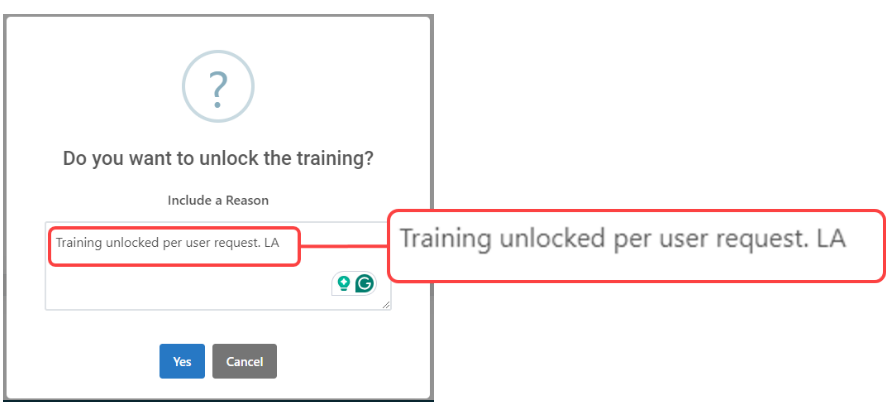


b) Click **Yes** to cancel the course, or click **Cancel** to go back to the **View External User** screen.

15) The **Unlock** option will allow you to unlock a training for the user. Please note that the training can only be unlocked if the user has used all the available attempts.

a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel** to go back to the **View External User** screen. Click **Yes** to proceed.

- Make sure you enter a brief note before confirming **Yes**.

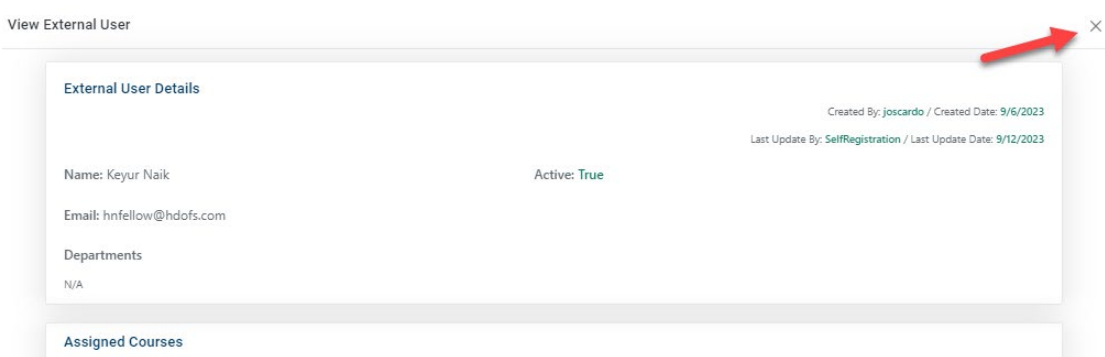


16) The **Certificate** option will allow you to print a Certificate of Completion for the user.

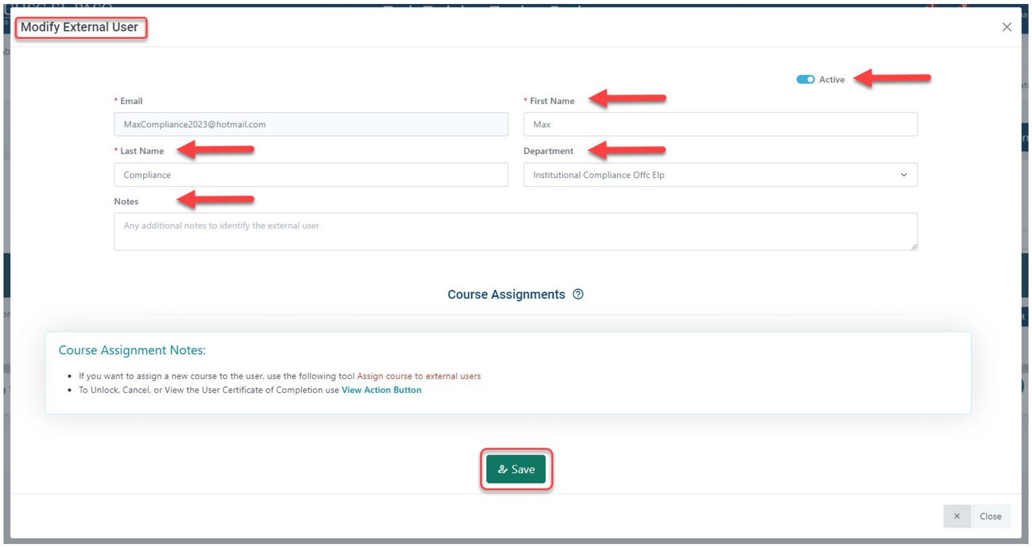
a) When you click on this button you will see the following screen:

b) Click on the **Print** button at the top right side of the page to print the certificate or save it as a PDF.

17) To go back to the **External Users** screen, click on the **X** at the top right side of the page.

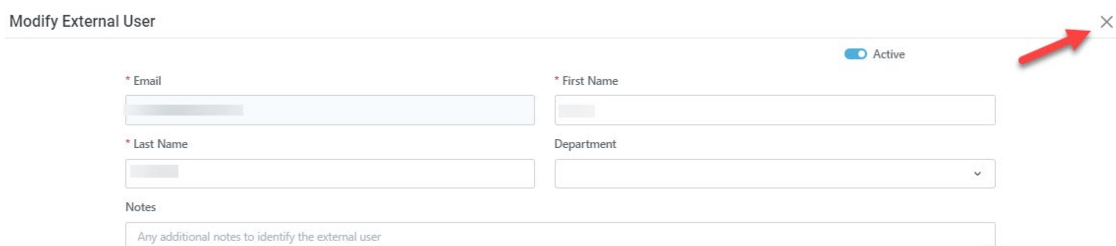


18) If you click on the Edit button in the **External Users** screen, this will take you to the **Modify External User** screen. In this screen, you can inactivate the user, update their name or department, or add any additional notes.

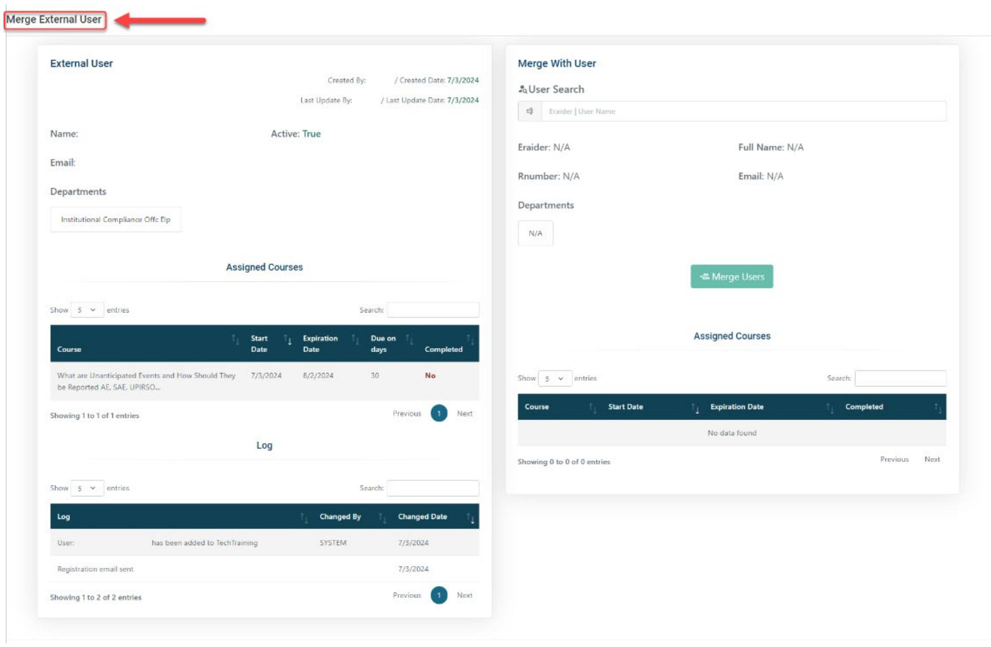


19) Once you have made all necessary edits, click on the  button.

20) To go back to the **External Users** screen, click on the **X** at the top right side of the page.

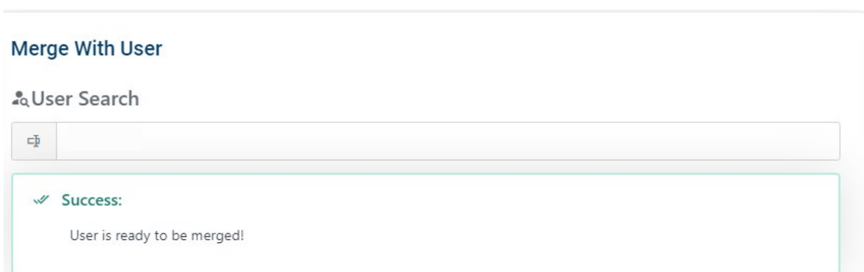


21) The person who created the external user's profile will need to monitor the external user(s) periodically to determine when to merge the external account with the new TTUHSC EP eRaider account. If you click on the  button you will see the **Merge External User** screen.

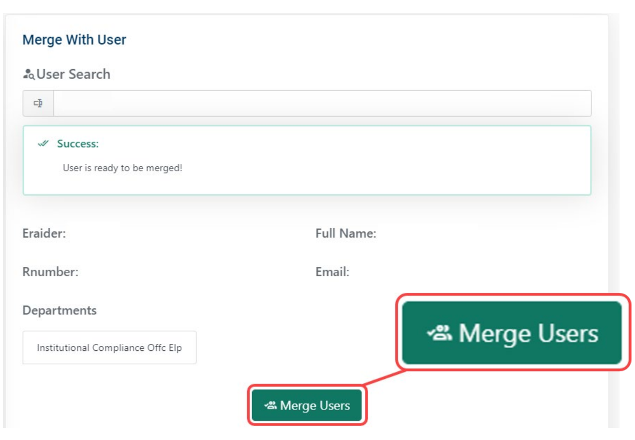


22) Click on the **User Search** box and type the user's Name/eRaider you want to merge. This will populate the user's information.

a) Once you have selected the desired user you will see the message below:



b) Click on the **Merge Users** button to merge the external user with the existing TTUHSC EP eRaider account.

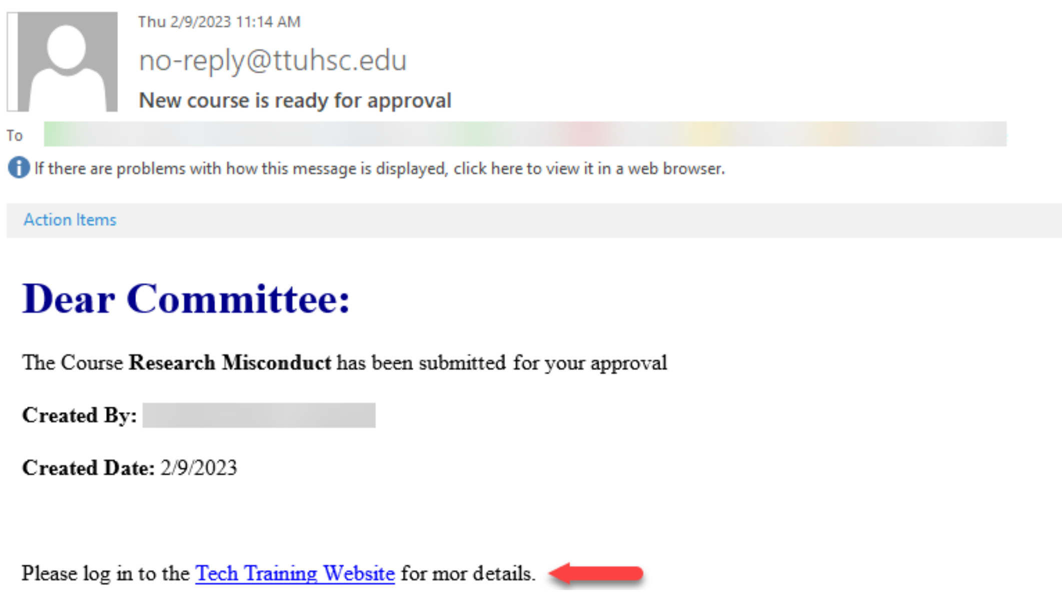


APPROVAL – APPROVE COURSE

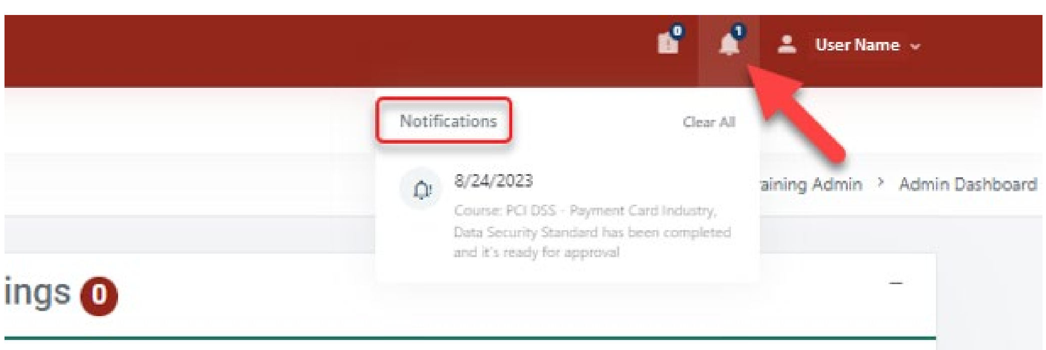
As a Committee Member, you will be responsible for approving the training courses that are created in Tech Training.

*Note: The training courses only require approval from **one** Committee member. If a training course has already been approved by a Committee member, no further action is required.*

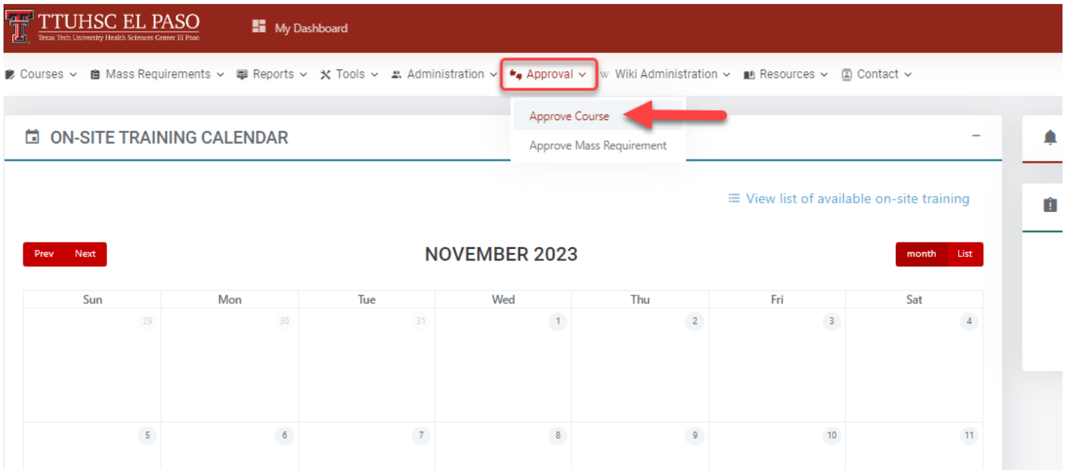
1) When a user submits a new training course, you will receive an email notification prompting you to review and approve the course. To access the course, click on the Tech Training Website link at the bottom of the email.



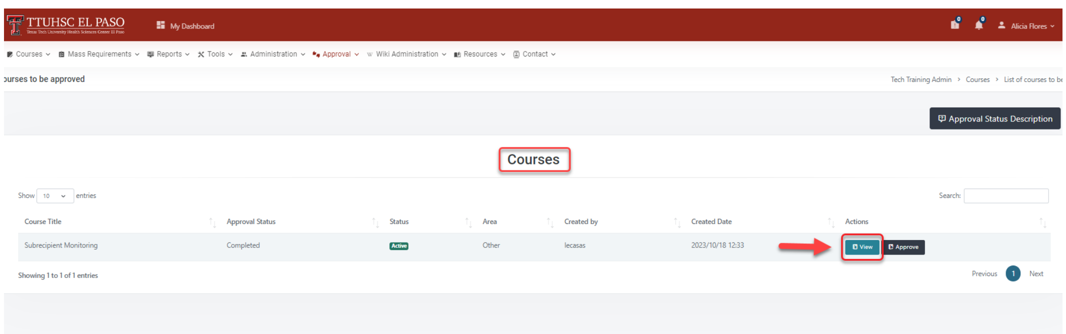
2) When you are logged into Tech Training, you will also receive a notification at the top right corner of the screen. To view your notifications, click on the bell icon.



3) To view the course, go to **Approval → Approve Course** at the top of the page.



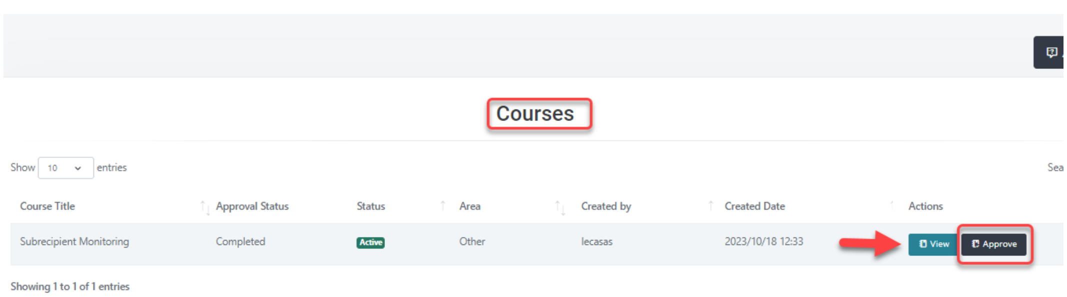
4) When you click on **Approve Course**, you will be taken to the **Courses** screen. To review the course that has been submitted click on the **View** icon in the **Actions** column.



5) The **View** function will show you the **Course Configuration**, **Course Details**, **Course Files**, **Course Questions** and the **Course Request Form**. Review the information submitted.

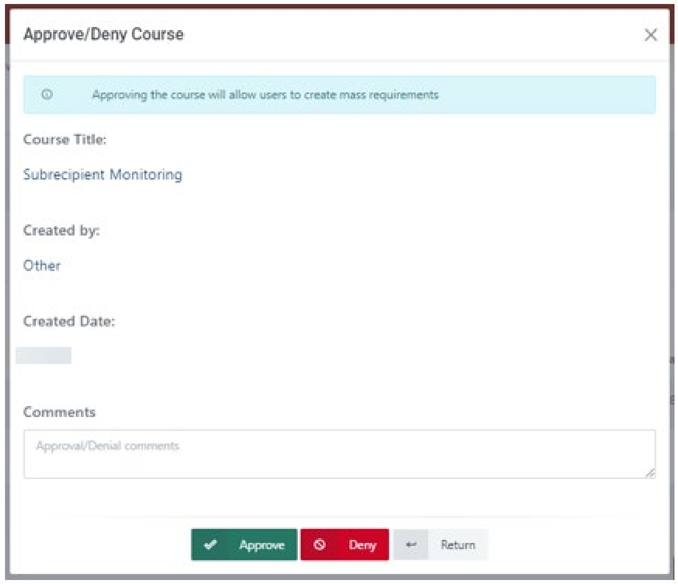
6) Once you are ready to approve/deny the course, click on the "**X**" at the top right side of the screen to go back to the **Courses** page.

7) In the **Courses** page, click on the **Approve** button in the **Actions** column.

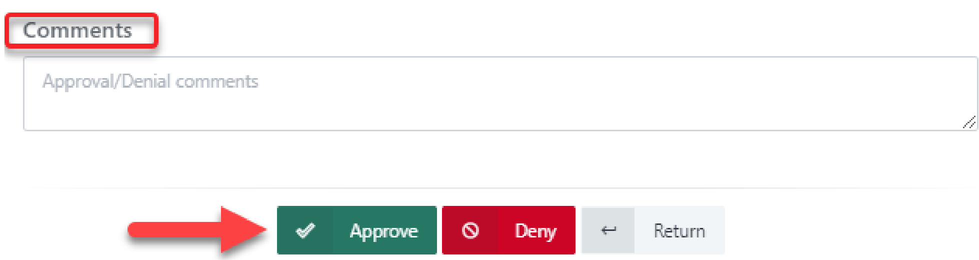


8) Next, you will see the following pop-up screen:

a) Click on the **Return** button if you are not ready to approve/deny the course.



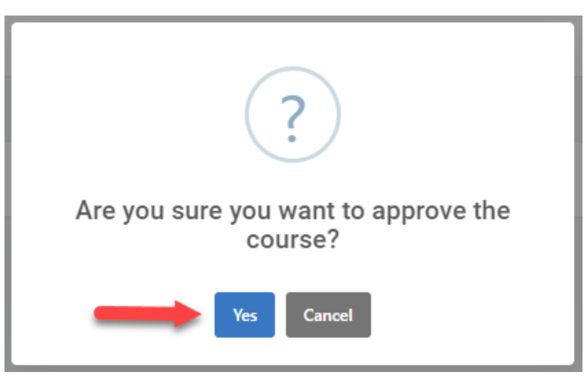
9) Before approving/denying a course, enter a comment in the **Comments** section then click on either **Approve**/**Deny**.



a) Example for course approval comment: "*This course is approved 01/20/2023. AF*"

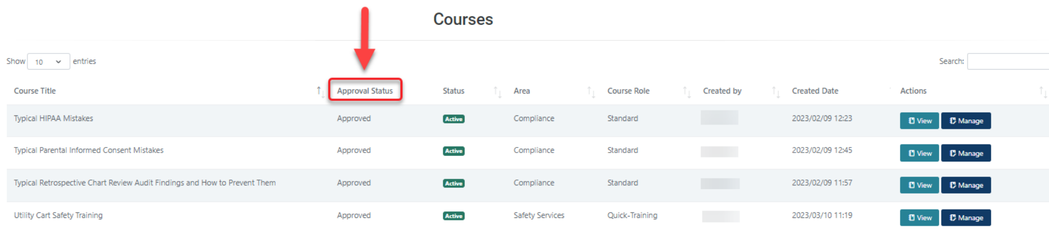
b) If you are denying the course, indicate the **specific** reason. This will assist the individual that created the course in making any necessary changes/edits.

10) Once you click on **Approve** you will see the following notification:



a) Click **Yes** to approve the course. To return to the **Approve/Deny Course** screen, click **Cancel**.

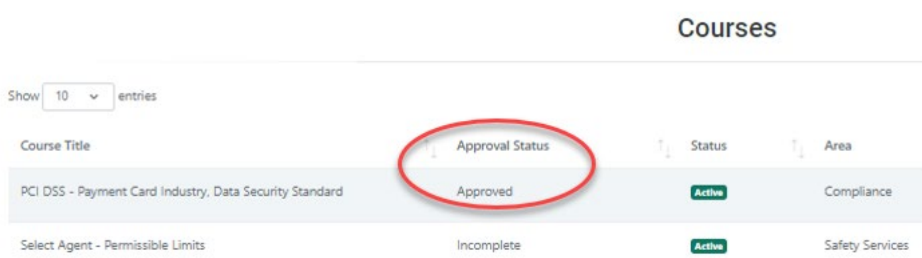
11) To verify that the course was successfully approved, you can go back to the **View Courses** section to view the course status.



a) Below are the course approval status descriptions:

Incomplete	The course has not been configured completely
Pending	The course was saved for later but can still be modified
Completed	The course was submitted for approval
Approved	The course was approved by the committee
Denied	The course was denied by the committee

12) The **Approved Status** for the course you have reviewed should say "**Approved**":



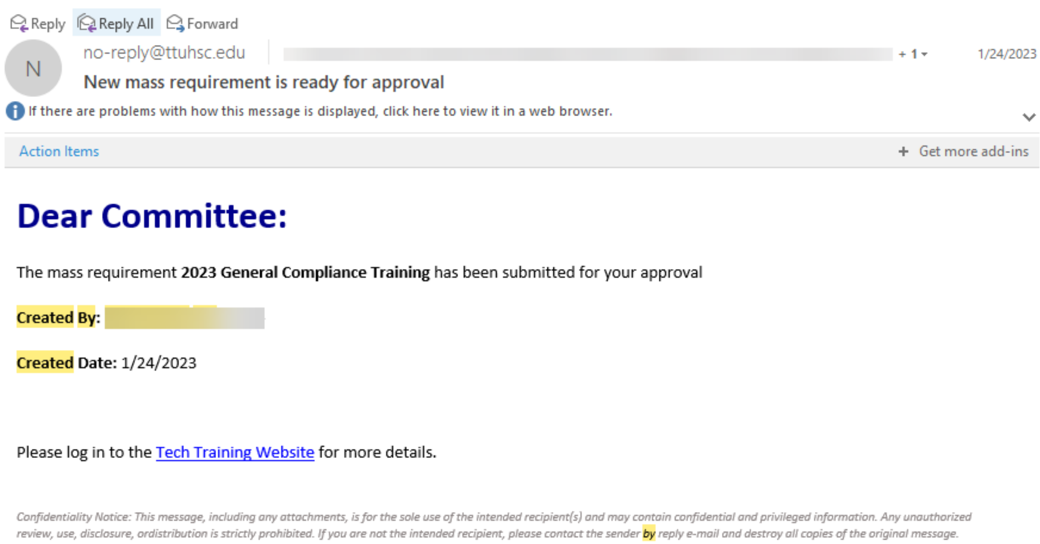
APPROVAL – APPROVE MASS REQUIREMENTS

A Mass Requirement is a training that is assigned to a large group of individuals. As a Committee Member, you will be responsible for approving the Mass Requirements that are assigned in Tech Training.

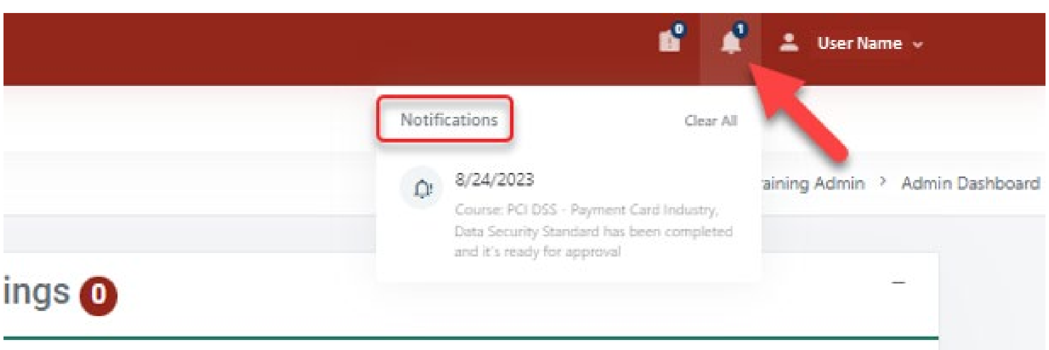
Note: The Mass Requirements only require approval from ***one*** *Committee member. If a Mass Requirement has already been approved by a Committee member, no further action is required.*

1) When a user submits a Mass Requirement, you will receive an email notification prompting you to review and approve the Mass Requirement.

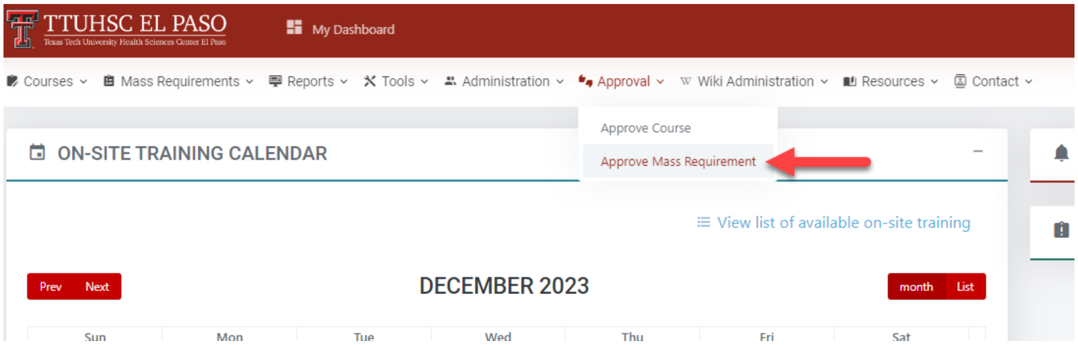
   a) To access the Mass Requirement, click on the Tech Training Website link at the bottom of the email.



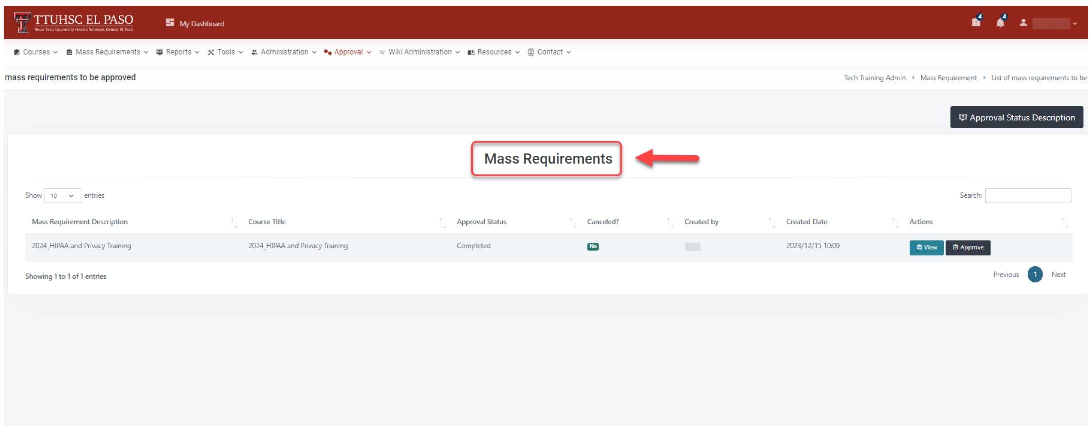
2) Once you are logged into Tech Training, you will also receive a notification at the top right corner of the screen. To view your notifications, click on the bell icon.



3) To review the Mass Requirement, go to the **Approval** dropdown at the top of the screen then click on **Approve Mass Requirements**.

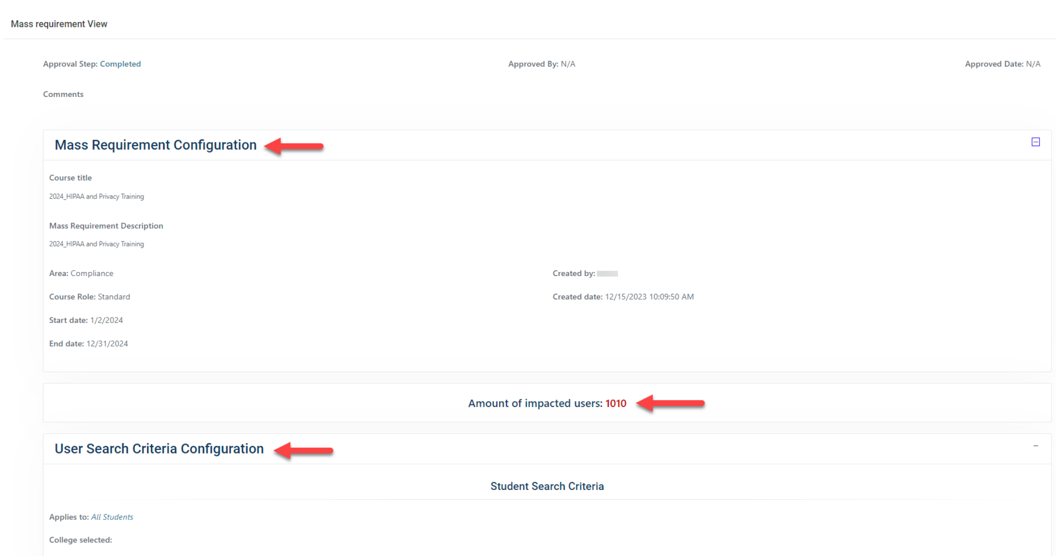


4) Next, you will be taken to the **Mass Requirements** screen:

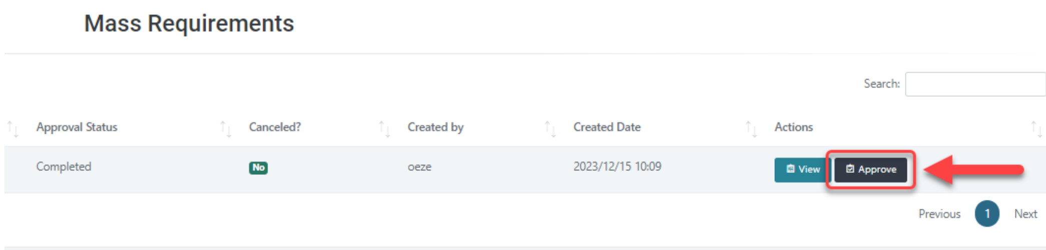


5) To review the Mass Requirement, click on the **View** button in the **Actions** column.

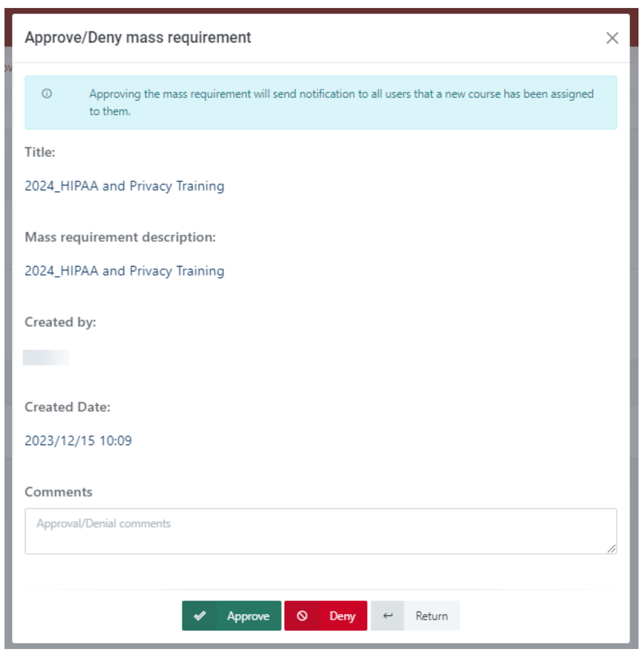
   a) When you click **View**, you will be able to see the **Mass Requirement Configuration**, the **Amount of impacted users** (users the training will be assigned to) and the **User Search Criteria Configuration**.



6) Once you have reviewed all of the details for the Mass Requirement and are ready to approve, go back to the **Mass Requirements** screen and click on the **Approve** button in the **Actions** column.



7) You will see the following pop-up:



   a) If you are denying the Mass Requirement, make sure you include the **specific reason** in the comments. This will assist the individual that created the Mass Requirement in making any necessary changes/edits.

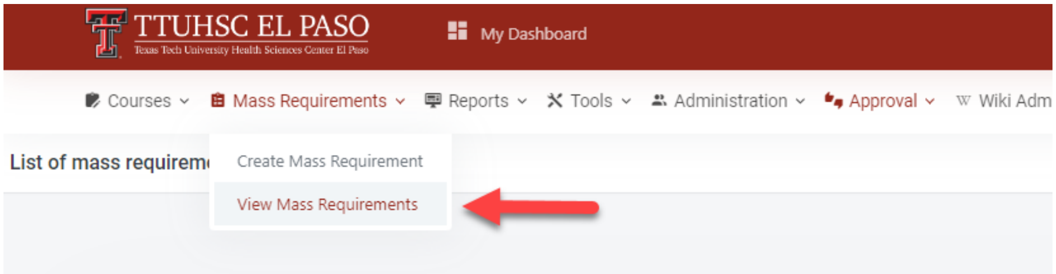
8) Before clicking on the **Approve** button, enter a comment for the individual that has submitted the Mass Requirement.

   a) Example Comment: "Mass Requirement is approved. The training course has been approved by the Committee. 01/21/23 AF"

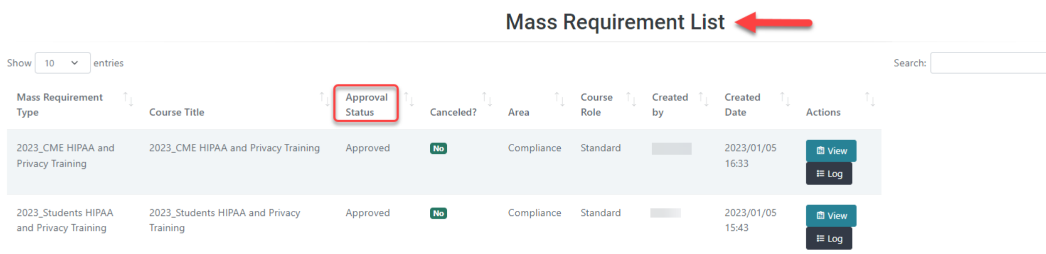
*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

9) Next click on the **Approve this Mass Requirement** button. Need to add snippet here

10) To verify that the Mass Requirement was successfully approved, you can go back to the **Mass Requirements** at the top of the screen, then click on **View Mass Requirements**.

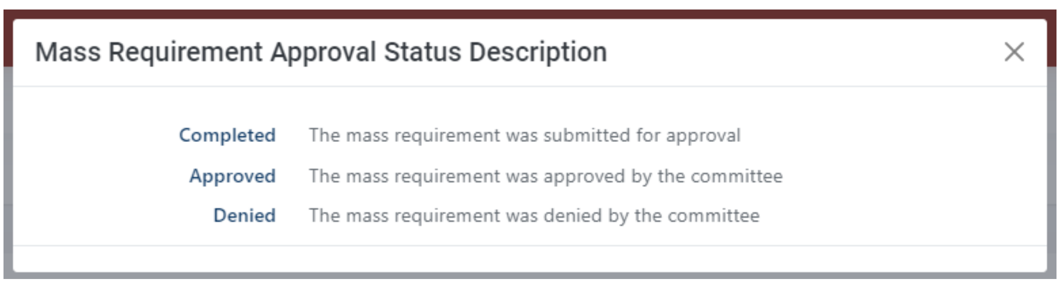


11) In the **Mass Requirement List** screen, you will be able to verify the status of the Mass Requirement under the **Approval Status Column**.

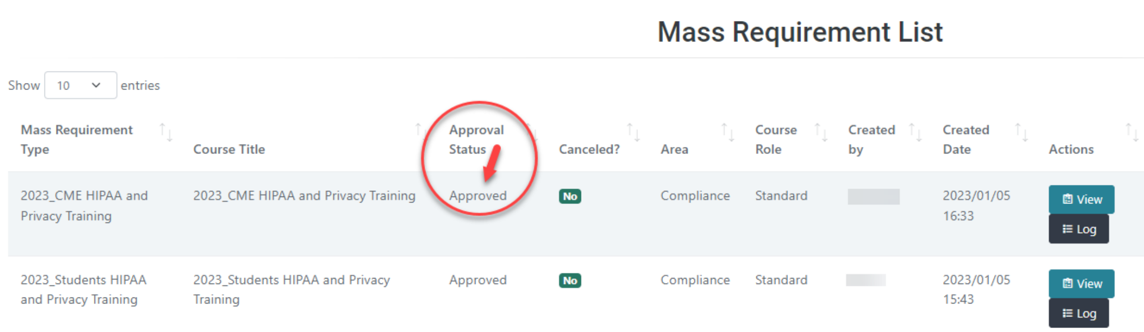


Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
2023_CME HIPAA and Privacy Training	2023_CME HIPAA and Privacy Training	Approved	No	Compliance	Standard		2023/01/05 16:33	View Log
2023_Students HIPAA and Privacy Training	2023_Students HIPAA and Privacy Training	Approved	No	Compliance	Standard		2023/01/05 15:43	View Log

b) Below are the **Mass Requirement Approval Status Descriptions**:



12) The Approved Status for the Mass Requirement you have reviewed and approved should say "**Approved**.

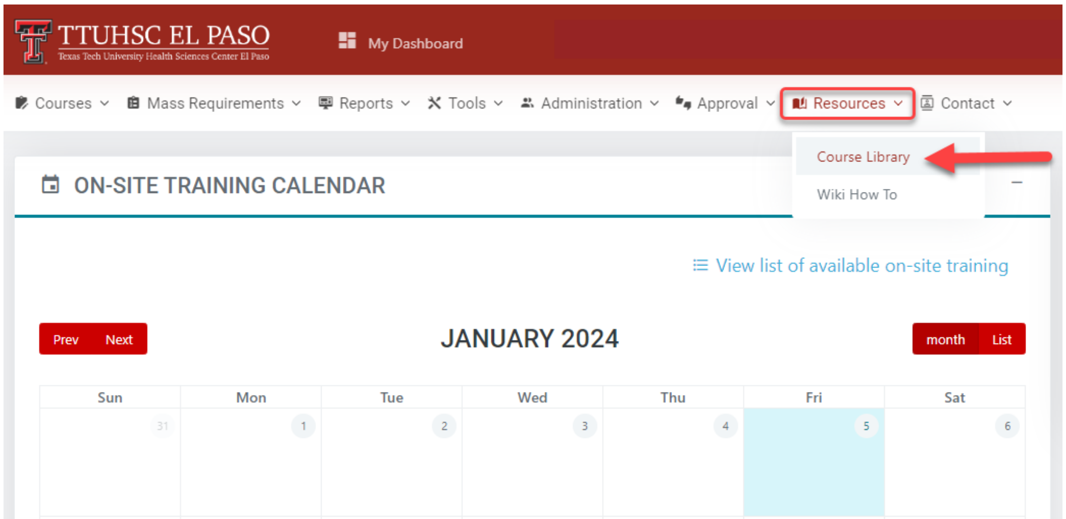


Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
2023_CME HIPAA and Privacy Training	2023_CME HIPAA and Privacy Training	Approved	No	Compliance	Standard		2023/01/05 16:33	View Log
2023_Students HIPAA and Privacy Training	2023_Students HIPAA and Privacy Training	Approved	No	Compliance	Standard		2023/01/05 15:43	View Log

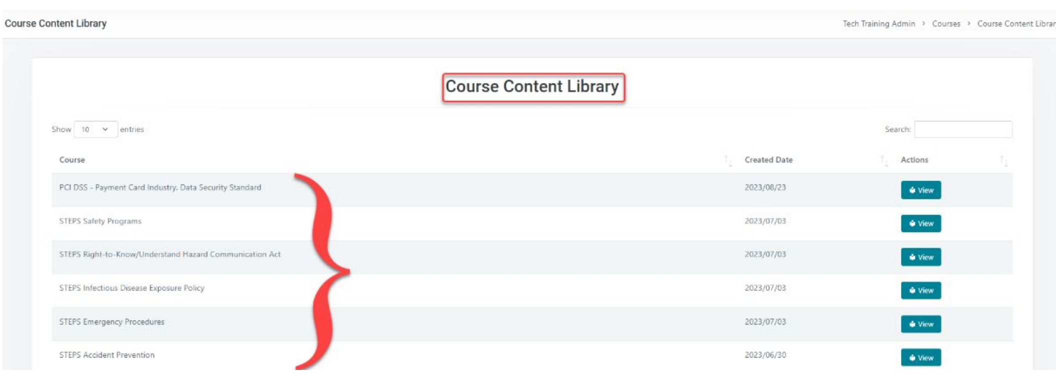
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

1) To go to the **Couse Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



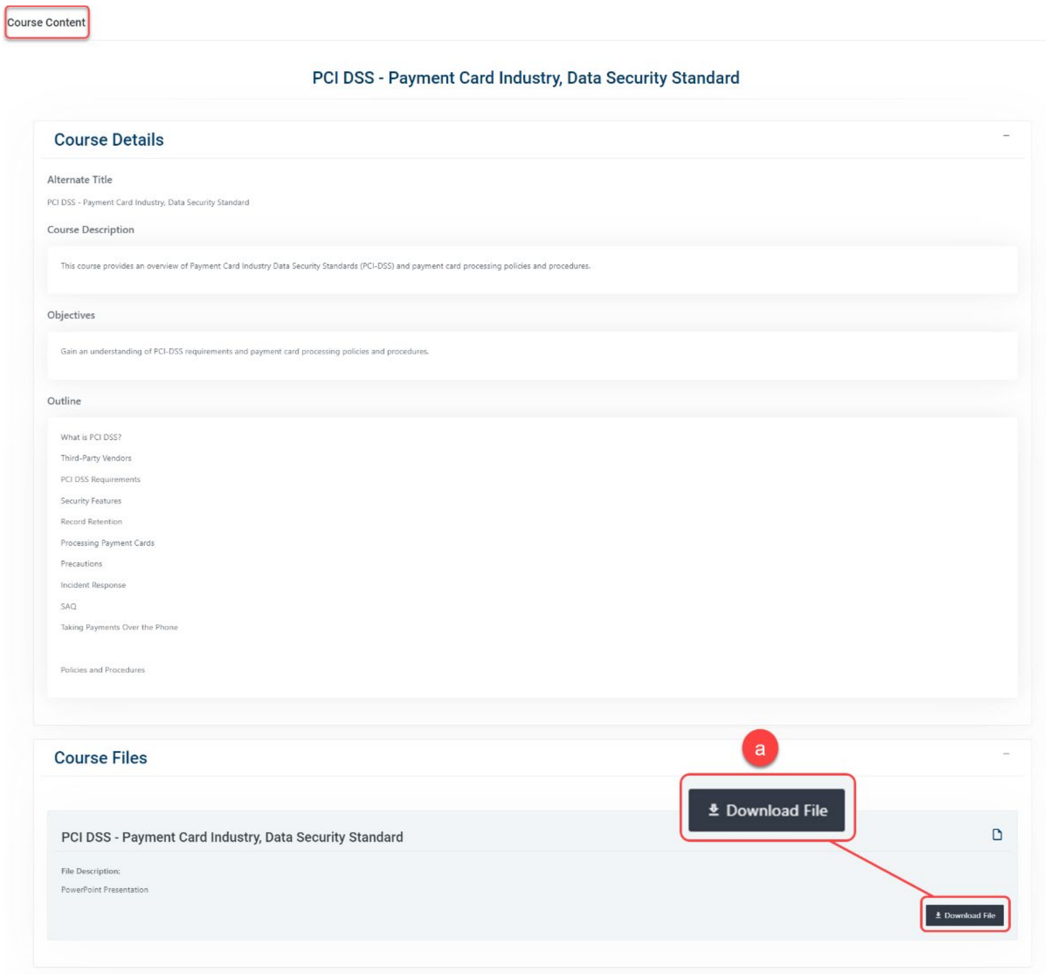
2) This will take you to the **Course Content Library** screen. In this page, you will able to see all the trainings that have been uploaded.



a) Click on the  button to view the content for your desired training(s).

3) Next, you will see the **Course Content** page which allows you to see the details for that training.

a) You can also download the **Course Files** for that course.

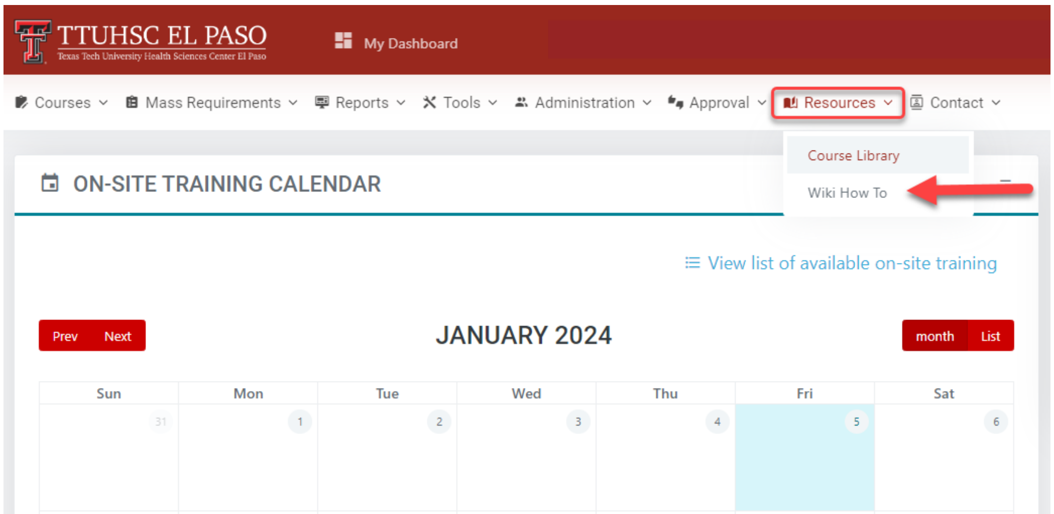

Course Content
PCI DSS - Payment Card Industry, Data Security Standard
Course Details
Alternate Title
PCI DSS - Payment Card Industry, Data Security Standard
Course Description
This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.
Objectives
Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.
Outline
What is PCI DSS?
Third-Party Vendors
PCI DSS Requirements
Security Features
Record Retention
Processing Payment Cards
Precautions
Incident Response
SAQ
Taking Payments Over the Phone
Policies and Procedures
Course Files
a
Download File
PCI DSS - Payment Card Industry, Data Security Standard
File Description:
PowerPoint Presentation
Download File

RESOURCES – WIKI HOW TO

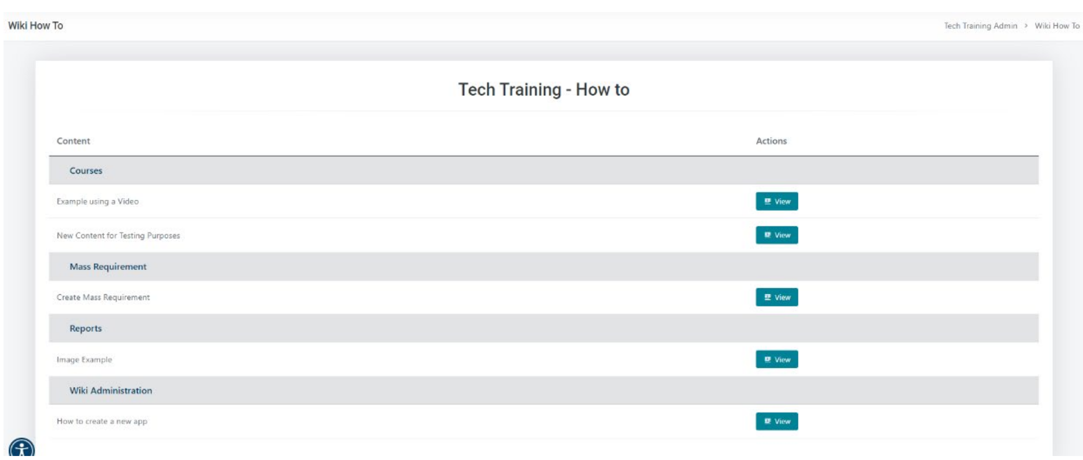
This feature will allow the user to see instructional videos, images or documents on different functions within the Tech Training application.

Note: Functions available vary depending on the user's role.

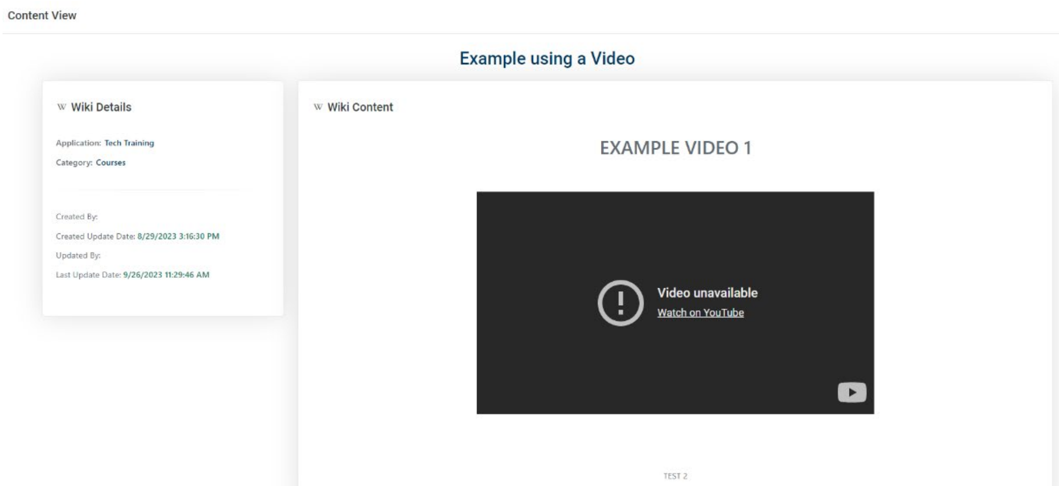
1) Go to the **Resources** dropdown at the top of the page and click on **Wiki How To**.



2) This will take you to the **Wiki How To** page. In the **Tech Training – How to** section you can see the instructional videos, documents, and images on various topics.



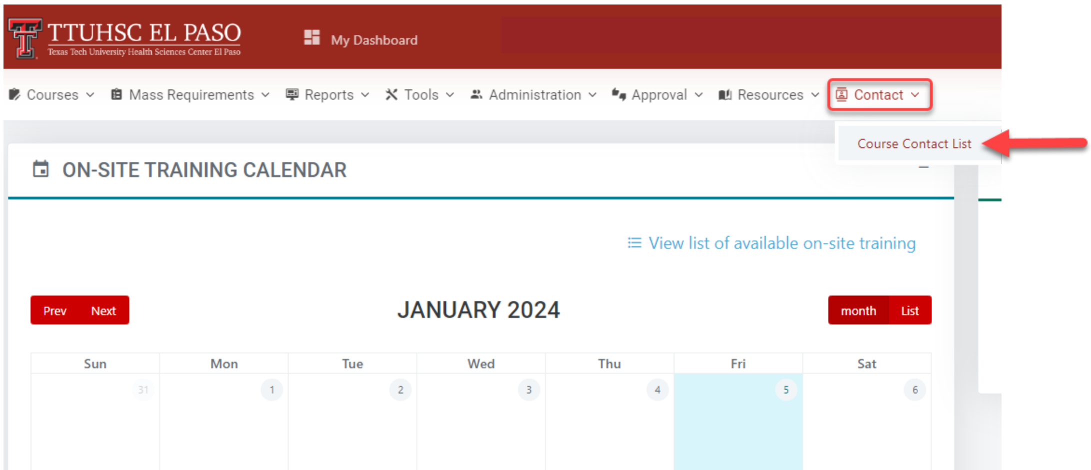
3) To see a specific section, click on the **View** button next to the name of the desired topic. This will display the content for that section.



CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

1) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.



2) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number and email.