TASKS OF A CMDS ADMIN

As a CMDS administrator, you are generally required to perform the following tasks in the system:

Add new personnel to the system.

- Add new users, including the correct email address, to the required department within the tenant, as approved.
- Assign the new user a manager/supervisor and validator.
- Assign the new user the required profile(s).
- Assign the new user any required training (COPs, SOPs, etc.).
- Send the new user their 'welcome email'.

Run reports

- CMDS offers several reports. As an administrator you should be familiar with the available CMDS reports, as well as how to export them from the system.

Notify CMDS Admin/Coordinator should anyone within your organization need to be archived.

- When personnel leave your organization, you must notify "CMDS Administration" (admin_cmds@keyera.com) so that you are not charged for these individuals come invoice time.

Manage training

- CMDS tracks Time Sensitive Safety Certificates (TSSCs), as well as other tenant specific training and as an admin you will be required to ensure this data is up-to-date.
  - TSSCs will need to be entered by an admin, you will need to manage the dates each ticket was completed, and you may be required to upload scanned copies of the tickets into CMDS.
- Your organization may choose to enter your COP/SOPs into CMDS, in this case, you will need to scan or link these documents to CMDS and ensure they remain current.
- If training is assigned to users as required, you will need to manage this, working with the supervisors/leads.

Manage personnel

- Within your organization, users may move from department to department, receive promotions, or change managers/supervisors/validators. Any of these changes will need to be done in CMDS as well.
- Users will often have questions regarding the use of the system, login, their required tasks, etc. as an admin you will be responsible for fielding these inquiries. If you are unable to answer a user's question, you will contact "CMDS Administration". Please do not have the user contact "CMDS Administration" directly.

Set up and manage system notifications

- Working with "CMDS Administration" you will manage and set up system notifications. This area is highly customizable depending on your organization's preferences. As an admin you need to know:
  - What notifications your personnel are required to receive
  - Who should be cc'd on the notifications
  - If anyone is exempt from notifications
  - As personnel change, the notification settings need to be updated as well.

Train other CMDS admins

- Depending on your role, you may be required to train other CMDS admins.
- NOTE - "CMDS Administration" requires one point of contact. All tenant admins must go through one point of contact.

Know your key contacts

- Detailed profile content questions or items that extend beyond system use please contact your account manager
- For system support/questions: admin_cmds@keyera.com

LOGGING INTO CMDS

http://www.keyeracmds.com/ and click "**Sign In**" (top right corner)

Enter your email address and password.

Click "Continue."

NOTE:

- You must use the email address that matches the one used in CMDS
- If this is your first time signing in your password will be **cmds246**
- You will be required to change your password to one that is a minimum of 6 characters long
- If you forget your password, click "Reset my password" to reset it

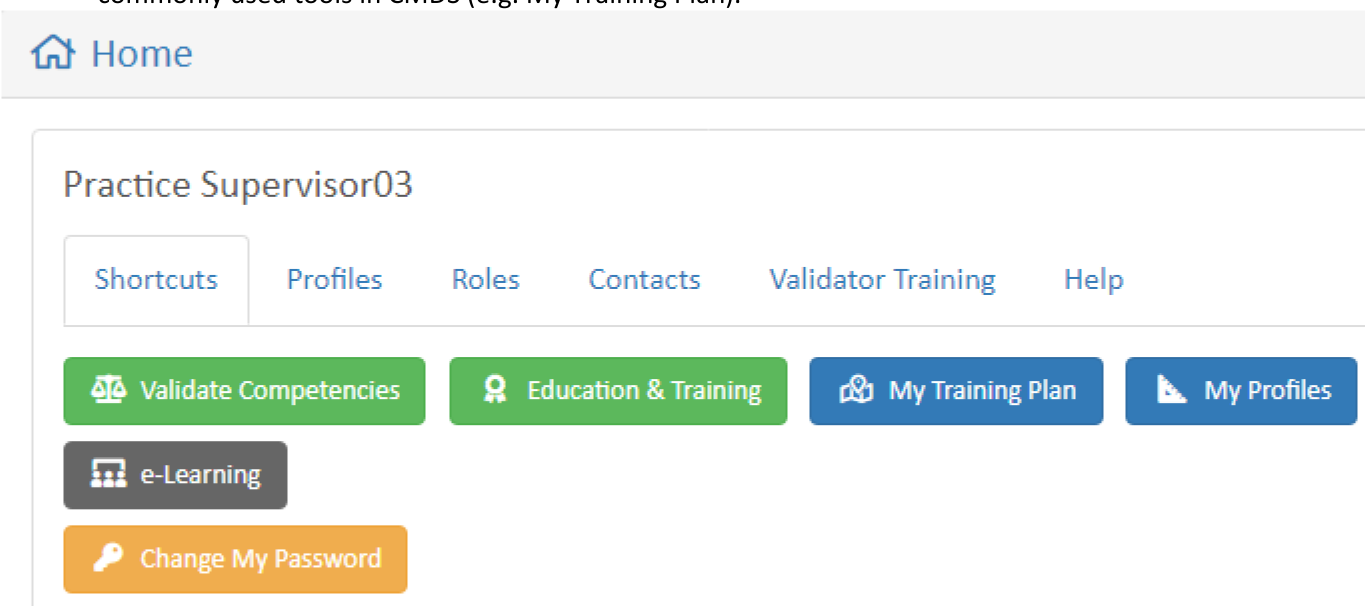
Home Page – From Top to Bottom

TOP

- Home icon – click to navigate home at any time
- Tenant icon – click to access personal information, profiles, competencies, college certificates, and resources.
- Reports icon – click to access and run all CMDS reports
- Admin icon – click to access administration functions, libraries, and bulk update tools.

User Name Box

- Name as it appears in the system is shown
- 6 tabs are available – **Shortcuts, Profiles, Roles, Contacts, Validator Training, and Help**
- Shortcuts tab is the default display, and several shortcut tools are available for users to quickly access the most commonly used tools in CMDS (e.g. My Training Plan).



- Users can view the information under each of the 6 tabs by clicking on the tab name (e.g. Profiles).
- The "**Contacts"** tab contains a list of your manager(s), supervisor(s), and validator(s). If you are a manager, supervisor, and/or validator you will also see a list of the individuals you manage, supervise, and/or validate.
    - If you are a Manager and have people assigned to you then you will see them listed under "Workers".
    - Managers can click on the house icon next to the user's name and be directed to the user's home page to see where the user currently stands in their training.
    - If you are a Validator you will see the people assigned to you listed under "Students".

Profile(s) Required for Compliance box

- From your Home page.
- Toggle between "primary profile only" and "all profiles requiring compliance" by clicking the radio button.
- When 'primary profile only' is selected the name of your primary profile will display, and the competency totals in the compliance summary will reflect your primary profile only.
- When "all profiles requiring compliance" is selected, the competency totals in the compliance summary will reflect all profiles requiring compliance.
- The "Compliance Summary" breaks down each compliance category, showing your percent complete in each area, to view the assigned items, click on the colored text to the right (e.g. **12 out of 13 completed**)
- The "Training Summary" box shows any additional training that you have been assigned, to view the assigned items, click on the colored text to the right.

Competency Summary box

- Shows a bar graph breakdown of your Profiles
- Click on the status (e.g. **Expired**) to access the competencies
- To view a bar graph on your secondary profiles, select the profile from the drop down

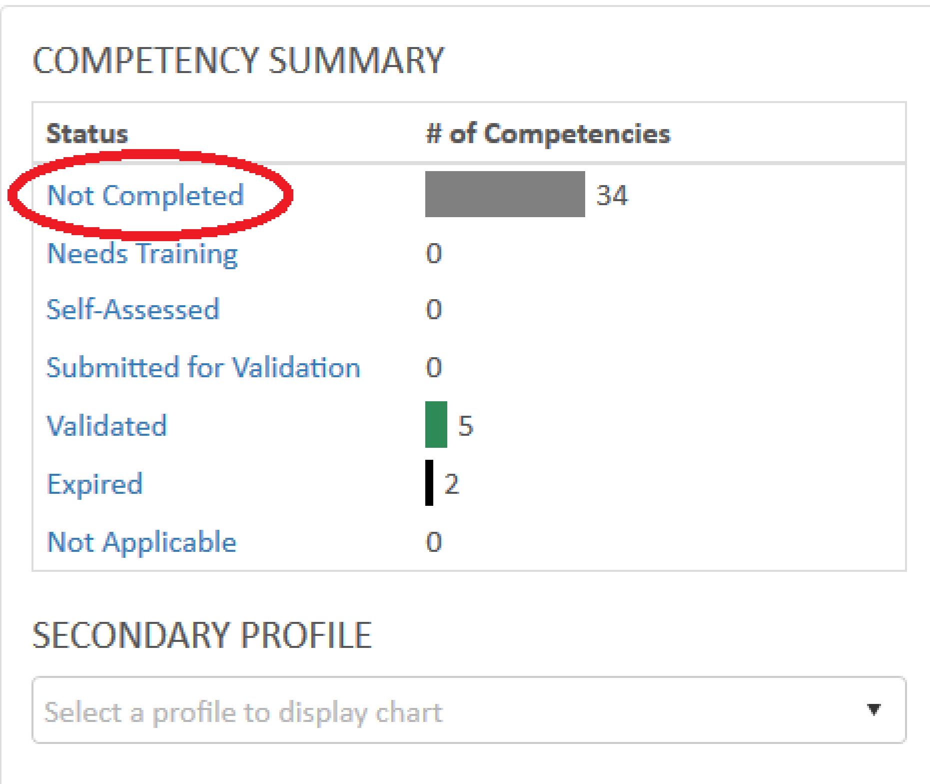
Definitions:

- **Primary Profile (Required for Compliance):** The job profile that best matches the job you are performing the majority of the time.
- **Secondary Profiles (Required for Compliance):** Job profiles that contain a mandatory skill set for supporting or additional functions required for your job.
- **Secondary Profiles (Not Required for Compliance):** Job profiles not required to safely and effectively complete your current job role (often roles you are training in).

There are a variety of ways to access to your competencies to perform your self-assessments. **NOTE: As an administrator you may not have a profile and may not have to complete self-assessments. This information might be for information only.**

Method #1: Using your competency summary bar graph

- From your home page, to access your Not Complete competencies in your primary profile, click **Not Completed** in the Competency Summary bar graph



- From your home page, to access your Expired competencies in your primary profile, click **Expired** in your Competency Summary bar graph
- To generate a bar graph on any of your secondary profiles use the drop down under SECONDARY PROFILE

Method #2: From your profile(s)

- From your home page, select the **My Profiles** shortcut.
- Click on the Profile name that you would like to self-assess on.
- Click on the competency number for which you would like to self-assess.
    - Note: you can use the search to locate a specific competency, category, or criticality.

Method #3: From the top menu

- Click your tenant icon, top right of the screen.
- Under Competencies click Begin Self-Assessment.

Completing your self-assessment:

- Using any of the above methods, once you are viewing the competency for which you would like to self-assess on, review attached Resources and Downloads, if required, review the knowledge and skills, then complete your self-assessment
- Click "**NEXT"** to be taken to the next competency. This saves your response. You <u>do not</u> have to click "Submit for Validation" after every self-assessment.
- Once you have completed several self-assessments, and are ready to notify your validator, click "**Submit for Validation"**. This sends an email notification to your validator informing them that you are ready to be checked out on your submissions. NOTE: For competencies which have been self-assessed, but not submitted, no notifications are sent to your validator.

Locating Specific Competencies for Self-Assessment

- When using both **method #1** and **method #2** above you can isolate a specific competency number, search for key words, isolate critical competencies, and/or search for expired competencies.
- Expand the Search box.
- Using the dropdowns and search boxes enter the applicable information and click "Filter".

Submitting Your Competencies for Validation

Once you have completed a number of self-assessments, and would like to notify your validator that you are ready to be validated on yourself assessments:

- Click your tenant icon top right
- Under Competencies click "**Request Validation"**
- You will see a list of all your self-assessed competencies that are ready for validation, click "**Submit for Validation"**. This will send an email to your assigned validator informing them that you are ready to be validated on the competencies listed.
    - NOTE: Your validator will only be able to validate you if they themselves are validated in that competency
    - You can verify who your assigned validator(s) are by going to your home page, clicking on the "**Contacts"** tab, and looking for your listed Validator(s). If no one is listed, contact your manager, administrator, or account manager.

Reviewing and Signing Off on Items Assigned to Your Training Plan

If you have been **assigned** a document for review, an eLearning module for completion, or a safety certificate that is required, you will see this reflected on your home page.

Option #1:

- To view what you have been assigned for completion, click **My Training Plan** under the shortcuts tab.
- Display will default to show **ONLY items NOT COMPLETE**.
    - To see BOTH complete and incomplete training **click** the box next to *"Show all of the resources in my training plan. By default, this screen shows only incomplete training; check this box to show completed training also."*

Option #2:

- Using the Compliance Summary click on the percent complete in each area, to view the assigned items, click on the colored text to the right (e.g. **12 out of 13 completed**)

PROFILE(S) REQUIRED FOR COMPLIANCE

◉ Primary profile only ○ All profiles requiring compliance

ABC 0001: CMDS Training

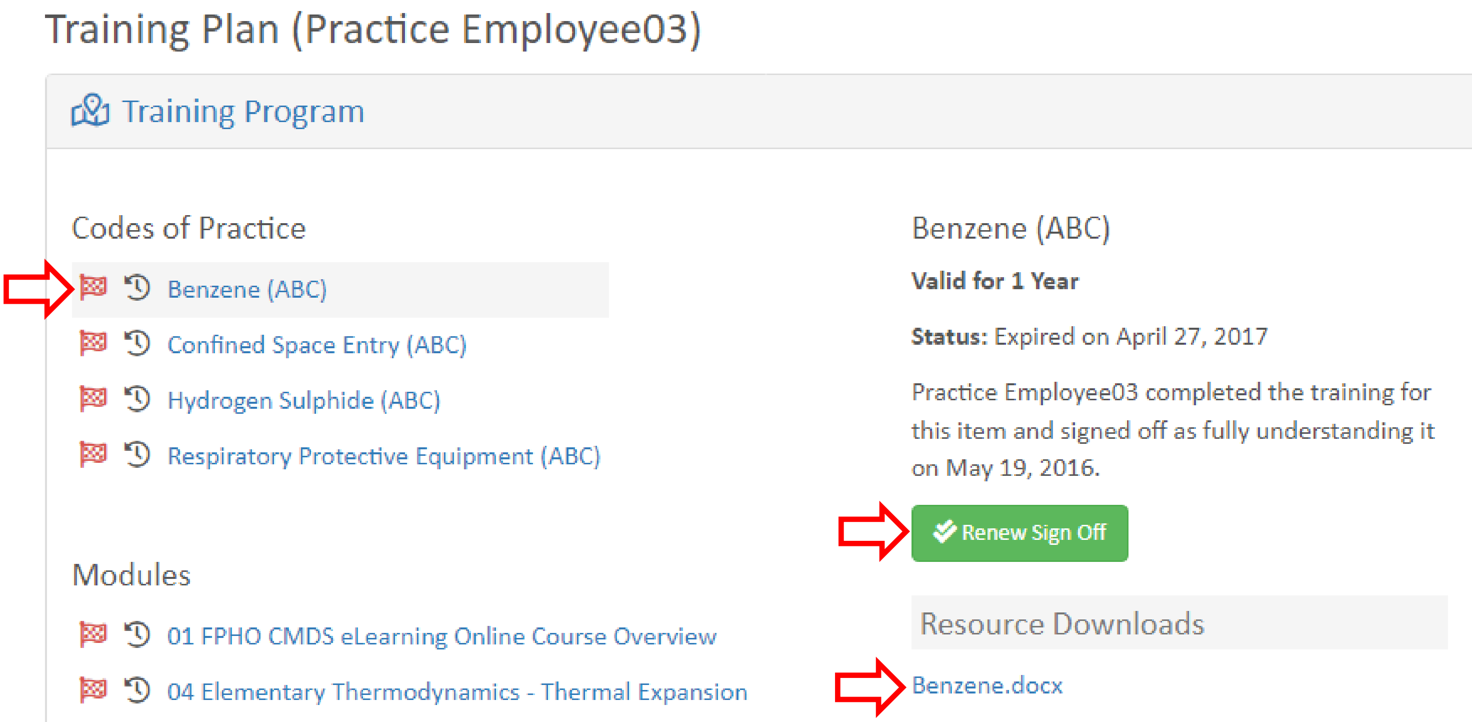
Compliance Summary

Time-Sensitive Safety Certificates	100.0%	0 out of 0 completed
Additional Compliance Requirements	100.0%	0 out of 0 completed
Critical Competencies	27.3%	3 out of 11 validated
Non-Critical Competencies	64.3%	18 out of 28 validated
Codes of Practice	0.0%	0 out of 4 signed off
Safe Operating Practices	16.7%	2 out of 12 signed off

For Codes of Practice, Safe Operating Practices, Additional Compliance Requirements, Site-Specific Documents, and Training Guides;

- To view what you have been assigned for completion, click "My Training Plan" under the shortcuts tab. OR using the "Compliance Summary" click on the hyperlinked percent complete in each area (e.g. **12 out of 13 completed**)
- For any of the categories listed above you are required to **READ/REVIEW** and **SIGN OFF** that you **understand** the content
- **Click** on the document you would like to sign off on
- **Open the document**, under Resource Downloads, read/review its content

- **“Click Sign Off”**
- This will remove the item from your training plan and show it as complete.



For Assigned eLearning;

- To view what you have been assigned for completion, click “My Training Plan” under the shortcuts tab. OR using the “Compliance Summary” click on the hyperlinked percent complete in each area (e.g. **12 out of 13 completed**)
- **Click** on the eLearning module title to open/complete the module
  - You must complete the associated quiz with a grade of **90% or higher**

For Time-Sensitive Safety Certificates;

- Your organization may choose to **track your required safety tickets** in CMDS
- If your required/assigned TSSC is **expired or not complete** it will show in your Training Plan
- You **cannot** remove this item or mark it as complete. **You must contact your local administrator and show proof of completion. Your administrator will then update your completion status.**

Further information

- **Clock icons** mean there is a time clock on that resource. Once you sign off on that resource it will expire at a set interval from the sign off date (e.g. 1 year) at that time you will have to re-review the resource.
- **Red flags** mean you have not yet signed off on or completed that item.
- **Green flags** mean you have completed reviewing the resource and signed off.

- Access "eLearning" from the Shortcuts tab on the home page OR from your tenant dropdown under "Resources".
- You will see a list of the available modules open in a new screen or tab - modules are categorized based on subject matter.
- The module will then display – **Note modules can contain multiple lessons, and multiple quizzes**.
- **Click on the title** to view the lesson content.

- You can then **review the lesson** content by clicking "Start" and **Take the Quiz by clicking "Start Quiz"**.
    - Note – Quizzes contain at least 10 questions and a grade of 90% or higher is required to pass.
- Complete the quiz, answering **every question**, and **click "Complete"**.
- Your quiz results are then displayed. You are given the option to attempt the quiz again by **clicking "retry this assessment".**
    - You will **not** be given the same quiz twice
    - Generally, you are allowed **3 attempts**, and then the system will lock you out of the quiz for 24 hours.
- Viewing the quiz counts as an attempt
- A passing mark will generate a certificate for your records. **If you would like a copy of the certificate, you can find it on the left hand side under the Module name at any time:**

- To return to the module click **"Course Outline"**
- To return to the list of available modules click **"Course Catalog"**

- From the list of available eLearning modules, you can <u>search</u> for a specific module using the "**Search"** bar
- Where it says "search by keyword" type a Keyword related to your search- Press **ENTER**
- Once you have searched for something you **MUST** <u>clear</u> your search criteria to obtain the full list of available modules again

Please NOTE:

- If a module contains multiple lessons, with more than one quiz, an average grade of 90%+ must be achieved to pass.
- CMDS records your **most recent grade**, not necessarily your highest mark.
- Modules are organized by category; the same module may appear in more than one category.

- For a record of completed eLearning, see your “**Education and Training” in CMDS**.
- There is **no fee per module** and users can complete as many modules as they would like.
- You **do not** have to attempt the quiz
- We have done our best to make all videos and images viewable to all users. If a file is not loading, please try accessing eLearning on an alternate browser.

ADDING NEW USERS TO CMDS

- Click on "**Admin"** (top tool bar)
- Click on "**People"** (under Administration)
- Expand the Search box. Enter the name of the user you would like to add.
  - ****Double check that the user you would like to add is not already in the system.**
- If the user is not in the system already click "**New"** (top right)
- Enter the person's information – first name, last name, and email are **mandatory** fields.
- Expand the "**Tenant and Department"** drop down (bottom of the screen). Select the user's tenant and department. Choose the appropriate radio button:
  - Select "**is employed by this department**" if the user is a worker in that department
  - Select "**is employed by this tenant**" if the user needs access to tenant/department but should NOT show up on reports (for example an administrator that needs access to multiple departments but should not show up on the reports).
  - Select "**has access to the data for this tenant/department**" for individuals not employed with the tenant (e.g. external validator).
- Click "**Save"**.
  - NOTE: If the name entered is similar to an existing user, the screen will indicate the name is similar to an existing user. Click "Add a new user" if the user is new. If the person you are trying to enter already exists in the system **STOP** and contact admin_cmds@keyera.com

- Click the "**Login"** tab. Change the status to "**Approved"**.
- Click the "**Groups"** tab. Check the appropriate user group for that user. Everyone should be assigned to the **"CMDS Worker"** user group.
- Click the "**Details"** tab Notification check the "Enable email notification for this person" box.
- Click "**Save"**.
- Scroll down, expand each drop down to enter the appropriate information.

- Expand the "**Primary Profiles"** drop down to assign the user a profile.
- Click 'Assign a primary profile.'
- Select the **department** you have assigned them to and select the **profile** you would like to assign them. For primary profiles, choose "**Primary**" in the Type drop down.
  - *NOTE: Primary profiles match the job the user is currently doing most of their time.*
- **Status** can be left blank. If you would like the profile to show in the user's Training Plan choose "In Training".
- **Secondary profiles** can be assigned using the same steps, choosing "**Secondary**" in the Type drop down.
- To return to the user editor screen click "Edit User".

- Expand the "**Managers and Validators"** tab, assign the appropriate manager/supervisor/validator.

- For the user to access the system **you must send them their login information**. Check the 'Enable email notification for this person' box. Click "Save". Click "**Send Welcome Email"**, a new window will pop up, you can add content to the email or additional recipients, then hit "Send".

Modifying Profiles Assigned to Users:

- Click on "**Admin"** (top tool bar)
- Click on "**People"** (under Administration)
- Use the search criteria box to search for the person whose profiles you would like to modify

- Once you locate the user on the list, hover your mouse over the **paper clip icon** to the right of their name, click "**Profiles"**.
- Here you can **add and remove profiles** acquired for this user
- Remove profiles by clicking the **garbage can icon** to the right of the profile.
    - Note the user will not lose their competency history when the profile is deleted
- Add profiles by scrolling to the bottom of the screen, using the "**Assign New Profile"** select the department from the drop down, the profile, and Primary or Secondary.
    - If the user already has a Primary profile and you would like to assign them a different one, remove the existing primary first.
    - A secondary profile can be required for compliance OR not required for compliance by checking the box "**Yes, this profile requires compliance"**.
    - Profiles assigned for training and development would generally not be required for compliance, profiles assigned as mandatory (e.g. ICS roles) would be required for compliance.
- Click "**Assign Profile"**.
    - *** You can add several secondary profiles if needed.*
    - *** Once you select "Assign Profile" the profile is added to the individual and saved*

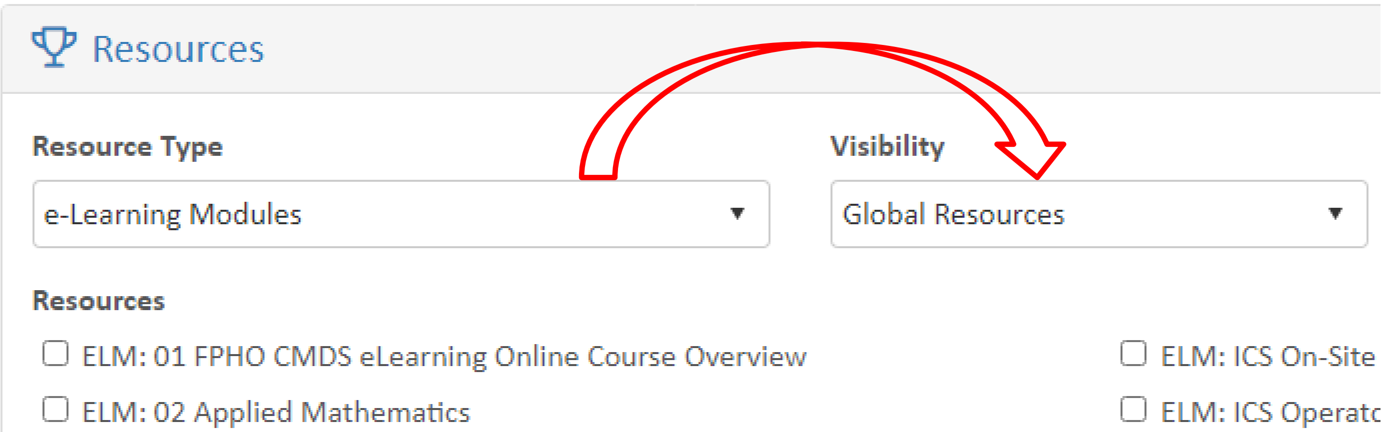
Points to keep in mind:

- Yellow exclamation signs next to a user's name indicate the user **has not been assigned a primary profile**.
- **Confirm a user is "Approved"** before sending the "welcome email".
- The system requires a **unique and valid email address for all users**.
- A user can have **more than one Secondary profile** but should **only have one Primary profile**, that primary profile should represent the job they are currently performing.

Assigning Tenant-Specific training to Individuals:

To be completed ***after*** you have loaded your tenant specific documents/links in the system

- Login to CMDS and your home page:
- Click on "**Admin"** (top tool bar)
- Under Bulk Update Tools, click "**Bulk Assign Education and Training**".
- Select a "**Resource Type"** (Example: SOP's, COP's)
    - For assigning CMDS eLearning modules, change the "Visibility" drop down to "Global Resources"



- Select a "**Category"** (can be left blank)
- Select the resources you would like to assign by **checking the box**.
- Scroll down and expand the "**Users"** window.
- Select the **department** for which you would like to assign the resource
- You can choose to make the resource **Time-Sensitive by checking the box and choosing an interval**
- **Select the individuals** you would like to assign the resources to by checking the box next to their name.
- Once you have **checked the individuals** you would like to receive the selected resource(s), click "**SAVE"** (top right).

The individual(s) will receive the assigned resource to their "**Training Plan"** and will be required to "**sign off**" on the resource once they have **reviewed the associated material**.

Entering Time Sensitive Certificates (Individual)

- Login to CMDS and your home page:
- Use People to locate the individual: Click on "**Admin"** (top menu), click "**People"**.
- Expand the search box and search to locate the individual you would like to enter the Time Sensitive Certificates for
- Once you have located the person in the system **hover your mouse over the paper clip** to the right of their name and click "**Education".**
- Click "**New"** (top right)
- Using the drop downs, select "**Time Sensitive Safety Certificates" under Type**.
- Determine whether you want this certificate to show up in the user's "**Training Plan"** and whether it's "**Required"**.
    - Note: Generally, if the certificate **is required** you **should check the Training Plan box** as well.
- Choose the name of the certification from the "Resource" drop down
- Check the box next to "**Time-Sensitive"**
- Enter the **months** the certificate is valid for
- If the certificate is complete, change the status to **"Valid"** and enter a completed date
- If the certificate is not complete, enter it as **"Pending"**
- CLICK "**SAVE"**
- You can choose to **upload a pdf copy of the certificate** under Files by clicking "**Upload file"**
- Click "**SAVE"**.

Updating an Existing Time Sensitive Safety Certificate

- Use People to locate the individual: Click on "**Admin"** (top menu), click "**People"**.
- Expand the search box and search to locate the individual you would like to enter the Time Sensitive Certificates for
- Once you have located the person in the system **hover your mouse over the paper clip** to the right of their name and click "**Education".**
- **Scroll** to find the certificate you would like to update.
- **Click** on the name of the certificate (E.g. First Aid).
- **Update the date** to reflect the new information.
- Again, you can choose to **upload a pdf copy of the certificate** under Files by clicking "**Upload file"**
- Click "SAVE".

Uploading Tenant Specific Documents:

When uploading tenant specific documents to CMDS there are two available methods:

1. Upload a file (recommended PDF file type)
2. Upload a link

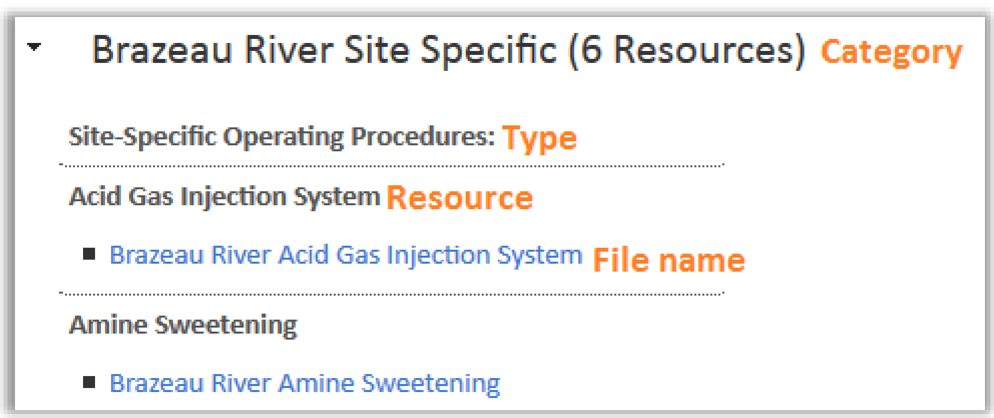
Uploading a File

- It is recommended you begin by **converting the document to a PDF** and saving it somewhere you will be able to easily locate it.
- Click your tenant icon top right, under Resources **click "Upload Tenant-Specific Resources" OR "Upload Tenant-Specific Files/Links".**

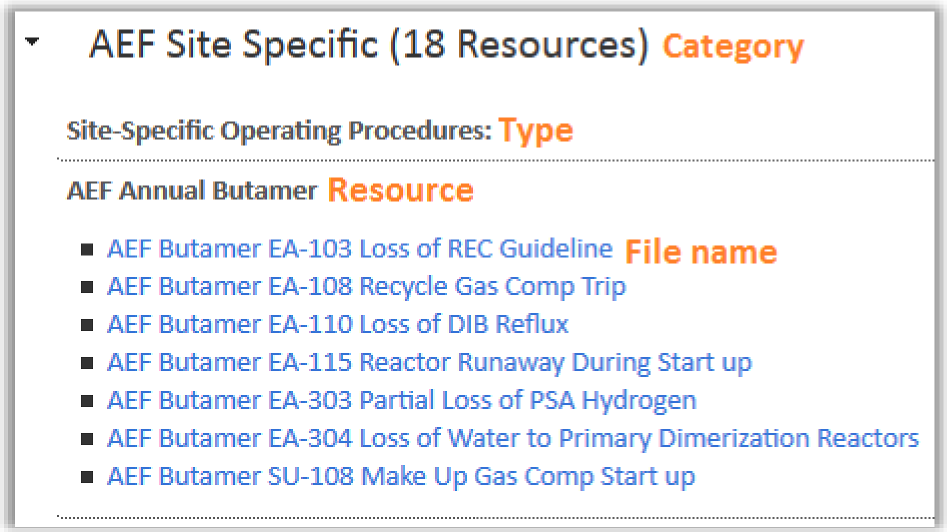
Upload Tenant-Specific Resources:

- Under "**Upload a Resource File"** click select and locate the document you would like to upload.
- **Select the "Type"** of resource from the drop down (e.g. Code of Practice)
- **"Category" is optional** and can be used to help organize the documents as seen in the examples below
- Type the "**Resource"** in or select from previously used Resource names. *Note: when typing in a new resource name you do not need to include the prefix, the system will add that automatically.
- You can load more than one file under a single resource; however it is important to keep in mind that this will result in one "Sign Off" per multiple documents.
- You can then add a competency number (optional), this will result in the resource showing up at the competency level during a self-assessment.
- Press "**Submit"**.

Example of one file per resource, resulting in a "**Sign Off" for each file**:



Example of multiple files per resource, resulting in **one "Sign Off" for the multiple documents** under the resource:



Uploading a Link:

- Scroll until you see "**Upload a Resource Link"**. Copy/paste the URL you would like to link to into the "URL" box
- Give the resources a "Title".
- Select the "**Type"** of resource from the drop down (e.g. Code of Practice)
- **"Category" is optional** and can be used to help organize the documents as above
- Type the "**Resource"** in or select from previously used Resource names. <u>*Note: when typing in a new resource name you do not need to include the prefix, the system will add that automatically.</u>
- You can load more than one link under a single resource; however it is important to keep in mind that this will result in one "Sign Off" per multiple documents (example above).
- You can then add a competency number (optional), this will result in the resource showing up at the competency level during a self-assessment.
- To add a "Competency", begin typing the competency number, once the competency appears in the drop down select it from the drop down, press the + to add multiple competencies.
- Press "**Submit"**

PART 2: Adding a new Time Sensitive Safety Certificate (TSSC) Title:

The "Upload Tenant-Specific Resources" tool allows admins to create new TSSC's titles for their tenant. This process is to be followed, if when assigning TSSC's to users, you do not see the TSSC you are searching for in any of the dropdowns.

- Under "Upload a Resource File", **leave the "File" space empty**
- **Select "Time-Sensitive Safety Certificates" under "Type"**
- Choose the TSSC from the list that appears to the right "Global Time-Sensitive Safety Certificates", click on the name, and click "Duplicate".
    - **If the TSSC is not in the list**, contact admin_cmds@keyera.com
- **After** you click "Duplicate" you are **done**, the TSSC has been created.

Upload Tenant-Specific Files/Links

- You can search for existing files or links using the “Keyword” box.
- You can add a new resource by clicking “New”, top right.
- Follow the directions above.
    - Click “Submit”

UPDATING TENANT SPECIFIC DOCUMENTS:

There are 2 ways to update tenant specific documents:

Option 1

- Click on your tenant logo top right
- Click on "**Upload Tenant-Specific Resources**"
- Upload the new file. **IMPORTANT: The file name must be exactly the same as the existing file name in order to successfully override.**
- Check the "Overwrite this file if it already exists".
    - **Replacing a document will not require users to re-sign off**, if you would like users to have to re-sign off on the document please "BULK EXPIRE" the resource.
- Continue to populate the drop downs to match the existing file location
- Click "Submit"
    - We recommend you refresh your browser then check the document to make sure it was successfully replaced.

Option 2

- Click "**Admin"**
- Click "**Resources (Field Admin)"** under "Libraries"
- Search for the resource you would like to update
- Click on the "**Title"**, click "**UPLOAD"** under the Downloads section
- From this screen you can choose to upload a file, a new link, and/or remove any of the existing attachments by clicking the garbage can(s) to the right of the screen.
    - We recommend you refresh your browser then check the document to make sure it was successfully replaced.

CMDS Available Reports:

Login to CMDS and your home page:

- Click “**Reports”** (top navigation bar).
- Here you will see all the available CMDS reports.
- For detailed report guidance please contact your administrator or account manager.

The following tool tips will help you navigate, generate, and export all available CMDS reports.

- To select the report criteria: click the blue filter icon
- The check box at the very top of the criteria list can be used to select/deselect all options.
- Use the “Departments” blue filter icon to select the department you would like to report on.
- Use the “Employee” blue filter icon, to either leave “All Employees” or choose an employee from the dropdown.
- When running the report on profiles, choose whether you would like the report to be generated on only the Primary Profile, all profiles that require compliance, or all profiles.
- Click **“Report”** (top right).
- To **export** report from the system, click “Download Excel”.

Companies interested in setting up an API should contact admin_cmds@keyera.com. Please note there is an additional one-time fee for the API (application programming interface).

Training Plan Templates

CREATING A NEW TRAINING PLAN TEMPLATE

From your CMDS Home Page:

- Click "**Admin"** (top right)
- Under Libraries, click "**Training Plan Templates"**
- Click "**New"**, top right
- Select your department from the drop down
- Under "Template Name", **type in the name of your template**. Optional type in a template description.
- Click "**Next**
- Select the resources you would like to add to the template buy **checking the boxes**. You can toggle the display by clicking the radio buttons next to "Group By" (right of the screen).
- Click "**Next"**
- For time sensitive resources enter the monthly interval. The time sensitive and required box will automatically populate once an interval is entered. NOTE: You can manually uncheck the required box if needed.
- For resources with no expiry, leave the month box empty.
- Please make sure the required box is checked for those resources that are required.
- Click "**Save".**

EDITING AN EXSISTING TRAINING PLAN TEMPLATE

From your CMDS Home Page:

- Click "**Admin"** (top right)
- Under Libraries, click "**Training Plan Templates"**
- Under "Search Criteria" **select your department** from the drop down
- Click "Filter", or enter the name of the template you would like to edit, then click "Filter"
- Under "Results", **click the name of the template**
- To edit the resources in the template, expand the "Resources" drop down
- To edit the settings for the template, expand the "Settings" drop down
- Once you have made your changes, click "**Save"** (top right)
- To **Duplicate the template** for use in another department click "Duplicate" (top right) in the "Training Plan Template" drop down.
- Select the new department you would like to add the template to.
- **Rename it**
- You will then see a message that indicates if any of the resources could not be copied to the new template/department. This is due to the resources not being currently assigned to the department you have selected.
- You can continue by clicking "**Save"** and the template will be copied/created (excluding the resources identified above).

ASSIGNING TRAINING PLAN TEMPLATES

From your CMDS Home Page:

- Click "**Admin"** (top right)
- Under Bulk Update Tools click "**Bulk Assign Training Plan Templates"**
- Select the **department** from the drop down
- Select the **template** from the drop down
- Check/uncheck people as required
- Click "**Next"**
- **Review, then click "Save"**

SETTING UP EMAIL NOTIFICATIONS

From your CMDS Home Page click "**Admin**", top tool bar.

Step 1

Start with setting up the **Email Notification Subscribers** for the individuals in the department.
Under Administration click "**Email Notification Subscribers**"

- Select the "**Department**"
- Choose "tenant" or "department" employment
- Select the type of notification you would like to set up
- Click "**FILTER**"
- **Select the individuals** you would like to receive the notifications by **CHECKING** the box next to their name

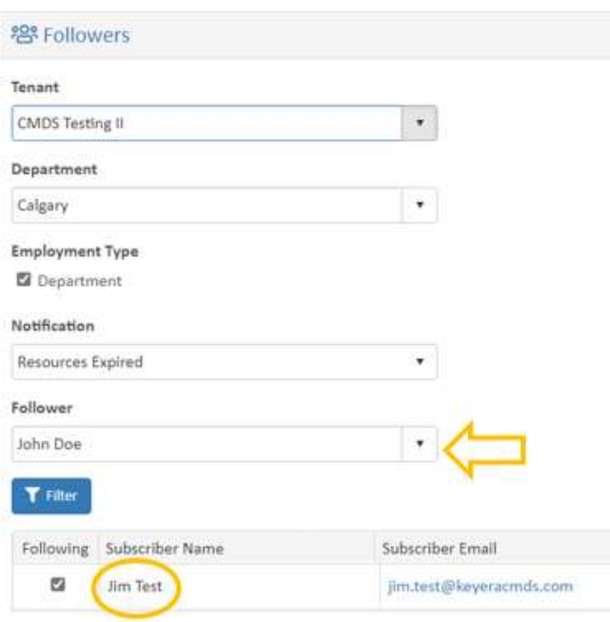
Repeat the above process for each notification type you would like to set up for each department.

- Click "**HOME**" at the top of your screen to return to your home page

Step 2 (Optional)

Next you can choose to set up **carbon copy email notifications**.
Under Administration click "**Email Notification Followers**"

- Select the "**Department**"
- Choose "tenant" or "department" employment
- Select the type of notification you would like to set up
- Select a "follower" from the drop down. This is the person for whom you would like to receive the email carbon copies.
- Check the box next to the user's name for which you would like the "follower" selected to receive carbon copy email notifications.
    - If you are unable to check the box next to the individuals name this means that notification subscriptions are not set up for that user for that notification. **Please refer to Step 1.**



In this example, John Doe will receive carbon copy notifications for Jim Test on all Resources Expired notifications.

TROUBLESHOOTING A USER'S PASSWORD

When logging into CMDS for the first the time a user will use the default password cmds246.
They will then be required to change their password to a password of their choice.

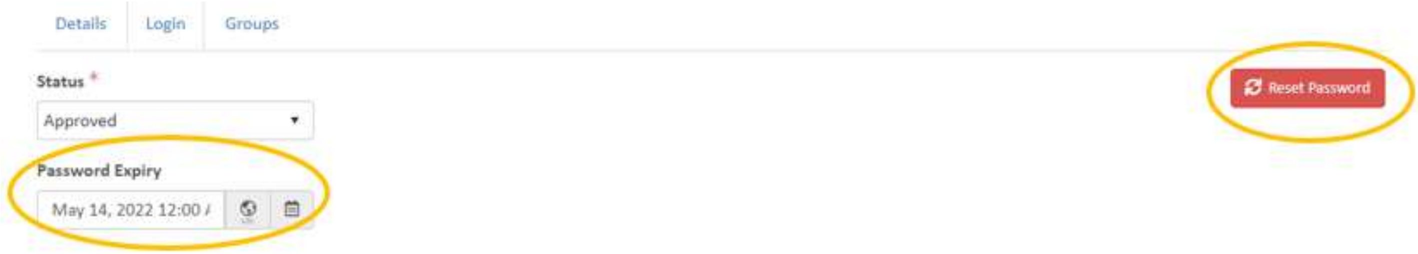
If a user forgets their password, they should reset it using the "**Reset my password**" link on the login page. This will require them to enter their email address (the email address currently in CMDS) and the system will email them with instructions on resetting their password.

As an administrator you can reset a user's password, returning it to the default password of cmds246.
To do this, go to "**Admin" -> "People"**. **Search** for the user. **Click on the user's name**. Under "Login", **click** "**Reset Password**". **Click "…" -> Save & Close**.

The user will then be able to login once using cmds246 and will be prompted to **change their password**, again to a password of their choice.

Passwords are also set to **expire yearly**. One year from the date the user first changed their password.

You can see a user's password expiry date by going to: "**Admin" -> "People"**. **Search** for the user. **Click on the user's name**. Under login information you will see "**Password Expiry" and a date**. If you know this date will be an issue for the user, you can **modify the expiry date** prior to the password expiring.



Please note;

- Once a user changes their password **no admin, or CMDS team member**, can see what they have changed their password to.
- Passwords **expire yearly** for all users.
- If a user is trying to access CMDS with the wrong email address the system will indicate that the email address being entered does not match one on file, and they will be instructed to contact us, or their local administrator. At which time anyone with admin rights in CMDS can help them determine what email address is currently in CMDS and modify it if needed.

Terms and Definitions

- **ACR** – Additional Compliance Requirements; general compliance category, allows each organization to track and assign training requirements that may not fall into one of the existing categories.
- **CMDS** – Competency Management and Development System
- **CMDS blog** – information sharing platform where news and updates are posted http://www.keyeracmds.com/blog
- **COP** – Code of Practice; generally segregated due to the Alberta OH&S Code requirement stating that organizations must have a code of practice for all listed harmful substances (e.g. Benzene and Asbestos).
- **Critical competency** – a competency that addresses a high-risk activity or subject. Generally, this competency is marked time sensitive and requires revalidation at a set interval (e.g. 1 year).
- **ELearning Modules** – unique to CMDS, these modules provide users with additional information and short quizzes to test their understanding. Generally completing an eLearning module is optional unless otherwise indicated by your organization/manager/validator.
- **HRD** – Human Resource Document; a document that requires employee review and sign off (e.g. a corporate drug and alcohol policy).
- **Primary Profile** - Required for Compliance; the job profile that best matches the job you are performing the majority of the time.
- **Secondary Profiles (Not Required for Compliance)** - profiles not required to safely and effectively complete your current job role.
- **Secondary Profiles (Required for Compliance)** - profiles that contain a mandatory skill set for supporting or additional functions required for your job.
- **SOP** – Safe Operating Practice
- **SSOP** – Site-Specific Operating Procedure; generally, a document that describes the steps that must be followed to perform a task, typically the start-up, shut down, or maintenance of a piece of equipment or process.
- **TG** - Training Guides
- **TSSC** – Time Sensitive Safety Certificates; certificates that are generally time sensitive in nature (e.g. First Aid and Ground Disturbance).

Additional Information

- If you require help or have a question you can:
    - Contact your local admin
    - Contact your account manager
    - Submit a help request from the **Help** drop down in CMDS
    - Email admin_cmds@keyera.com

- If you are interested in registering for the Validator Course go to http://www.keyeracmds.com click **"VALIDATOR TRAINING"** on your home page, click on the upcoming session you would like to attend. You will be contacted with the course details within 2 working days of submitting your registration.
    - Please note: you must be finished your self-assessments prior to attending the Validator Course.

- Check out the CMDS Blog for up-to-date CMDS information http://www.keyeracmds.com/blog SUBSCRIBE to stay in the loop!