Contents

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 organization, 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 organization specific training, 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 organization 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

https://www.keyeracmds.com/ and click **“Sign In”** (top right corner)

Enter your email address and password.

Click **“Login with Email”**.

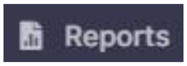
NOTE:

- 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.

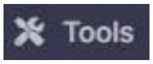
Home Page

Sidebar

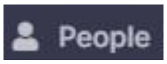
Home: click to navigate home at any time.



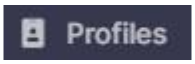
Reports: brings you to a list to access and run all CMDS reports.



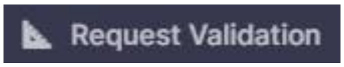
Tools: brings you to a list of the CMDS tools available to you.



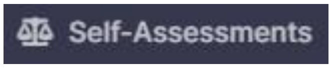
People: search for users in CMDS



Profiles: lists the profiles assigned to your account.



Request Validation: lists the competencies for which you have assessed your skill and are ready to submit to your validator.

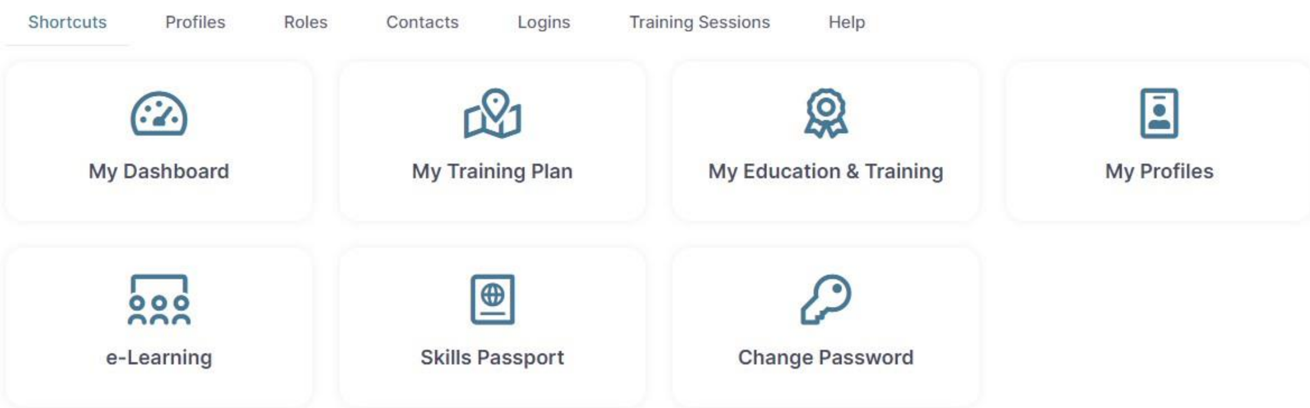


Self-Assessments: lists the critical and non-critical competencies assigned to you.

Training Plan: lists your assigned training (default displays incomplete training).

Home Page Box

- 7 tabs are available – **Shortcuts, Profiles, Roles, Contacts, Logins, Training Sessions, 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 7 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, you will see them listed under "Workers".
  - Managers can click on the speedometer icon next to the user's name and be directed to the user's dashboard 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 "Learners".

Profile(s) Required for Compliance box

- Click **"My Dashboard"**.
- Use the **'Show'** dropdown to toggle between "primary profile only" and "all profiles requiring compliance".
- 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., **1 out of 3 completed**).
- The 'Learning Summary' box shows any additional training that you have been assigned. To view the assigned items, click on the colored text to the right (e.g., **3 out of 4 completed**).

Compliance Summary

Time-Sensitive Safety Certificates	0.0%	0 out of 1 completed
Additional Compliance Requirements	0.0%	0 out of 1 completed
Critical Competencies	-	0 out of 0 validated
Non-Critical Competencies	0.0%	0 out of 48 validated
Codes of Practice	0.0%	0 out of 1 signed off
Safe Operating Practices		
Human Resources Documents	0.0%	0 out of 1 signed off

Competency Summary

- Shows a bar graph breakdown of your Profile(s).
- 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 dropdown.

Competency Summary

Status	Competencies
Not Completed	42
Needs Training	0
Self-Assessed	6
Submitted for Validation	0
Validated	0
Expired	0
Not Applicable	0

Secondary Profile

Status	Competencies
Not Completed	277
Needs Training	0
Self-Assessed	2
Submitted for Validation	0
Validated	0
Expired	1
Not Applicable	0

Select Secondary Profile Here

0009: Field Operator (Alberta,)

Definitions:

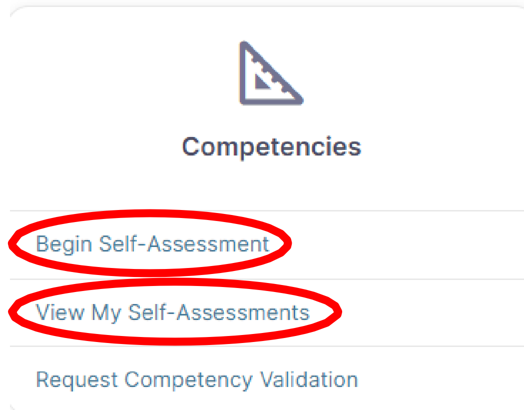
- **Primary Profile (Required for Compliance):** The job profile that best matches the job you are performing the majority of the time.
- **Secondary Profiles (Required for Compliance):** Job profiles that contain a mandatory skill set for supporting or additional functions required for your job.
- **Secondary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

Self-Assessment Guide

There are a variety of ways to access 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.**

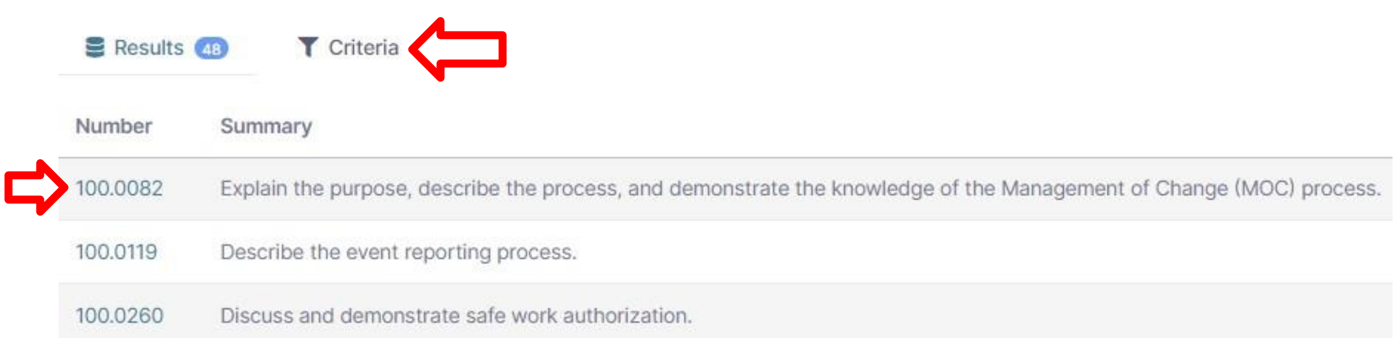
Method #1: Using your learning portal

- From your home page, scroll down to your 'Learning Portal'.
- Listed under 'Competencies', click **"Begin Self-Assessment"** or **"View My Self-Assessments"**.
- **"Begin Self-Assessment"** will bring you to the next competency waiting to be self-assessed
- Once you click **"View My Self-Assessments"**, click on the competency number for which you would like to self-assess.
    - Note: you can use Criteria to locate a specific competency, category, or criticality.



Method #2: From your profile(s)

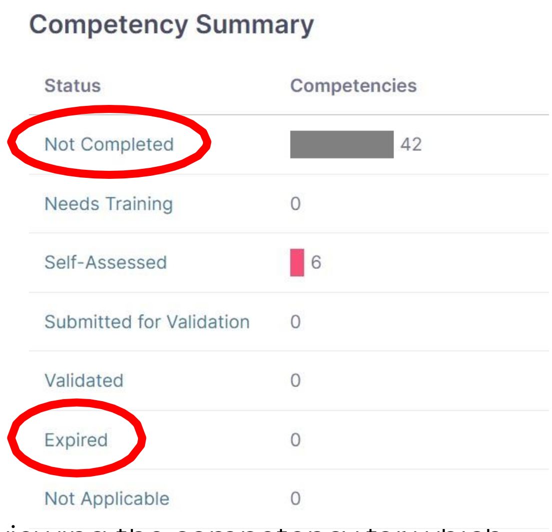
- From your home page, select **"My Profiles"** under 'Shortcuts'.
- Click on the Profile name that you would like to self-assess on.
- Click on the competency number for which you would like to self-assess.
    - Note: you can use Criteria to locate a specific competency, category, or criticality.



Number	Summary
100.0082	Explain the purpose, describe the process, and demonstrate the knowledge of the Management of Change (MOC) process.
100.0119	Describe the event reporting process.
100.0260	Discuss and demonstrate safe work authorization.

Method #3: Using your competency summary bar graph

- Click **“My Dashboards”**.
- Click **Not Completed** in the ‘Competency Summary’ bar graph.
- 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 dropdown under ‘Secondary Profile’.



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 ‘Achievements 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 do not 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”.**
- Review the list of completed competencies and click **“Submit for Validation”** in the bottom left.
    - 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 Validation

- When using any of the above methods, you can isolate a specific competency number, search for key words, isolate critical competencies, and/or search for expired competencies
- Expand the ‘Criteria’ box
- Using the dropdowns and search boxes, enter the applicable information and click **“Search”**

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 your self-assessments:

- From your home page, scroll down to your ‘Learning Portal’.
- Under ‘Competencies’, click **“Request Competency Validation”**.

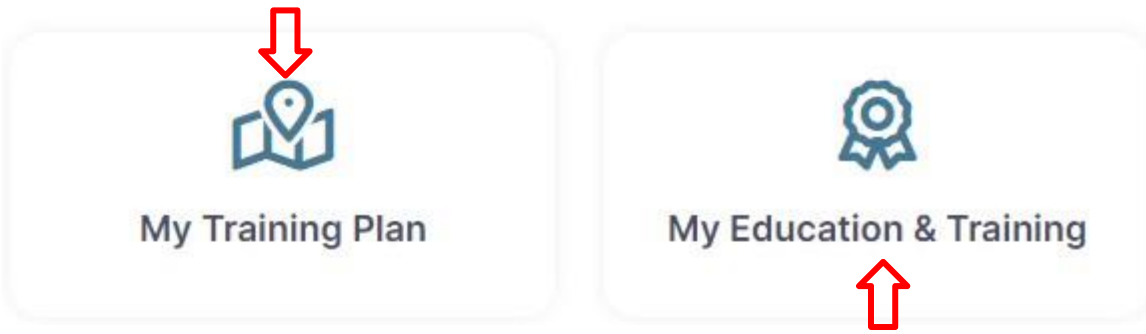
- You will see a list of all your self-assessed competencies that are ready for validation, click **“Submit for Validation”**. This will send an email to your assigned validator informing them that you are ready to be validated on the competencies listed.
    - NOTE: Your validator will only be able 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 to Your Training Plan

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

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 competed training also.*"
- Click on the **name** of the achievement you are looking to complete.
- Review the attachments under 'Training Achievements'/'Achievement Downloads' and click **"Sign Off"**.



Option #2:

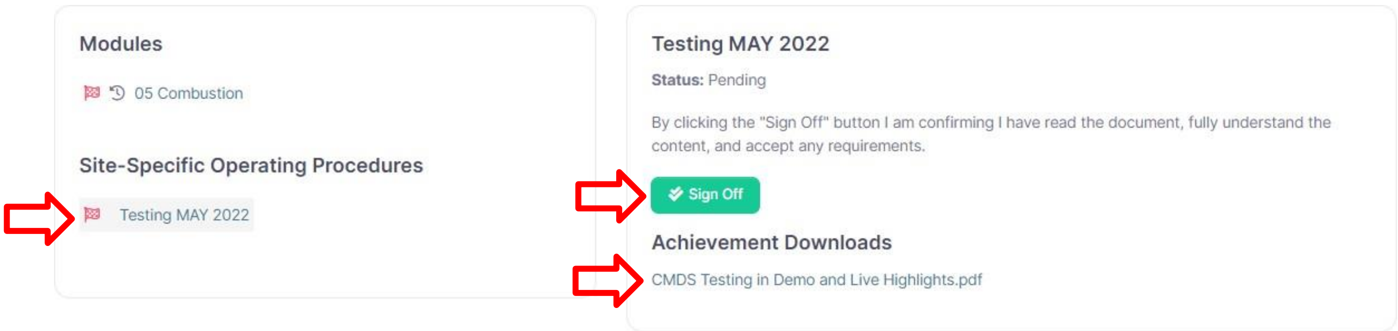
- To view what you have been assigned, click **"My Education & Training"** under the 'Shortcuts' tab.
    - NOTE: Everything you are assigned, regardless of if it is or isn't in your training plan, can be found here. If you are working on completing required training, please use Option #1 to find your required training.
- Based on the flags, you can tell what education you have completed and what is waiting to be completed.
    - A *green flag* means that the training is completed and valid.
    - A *red flag* means that the training is pending or expired.

Status	Completion	Expiration	Files	Flags
Valid	Jul 5, 2022			
Expired	Jul 31, 2021	Jul 31, 2022		
Pending (30%)				

- Click on the **name** of the achievement you are looking to complete.
- Review the attachments under "Training Achievements"/"Achievement Downloads" and click **"Sign 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 click **"My Education & Training"** under the 'Shortcuts' tab.
- 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(s), under 'Training Achievements'/'Achievement 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 click **"My Education & Training"** under the 'Shortcuts' tab.
- Click on the eLearning module title to open/complete the module.
  - You must complete the associated quiz with a grade of <u>*90% or higher.*</u>

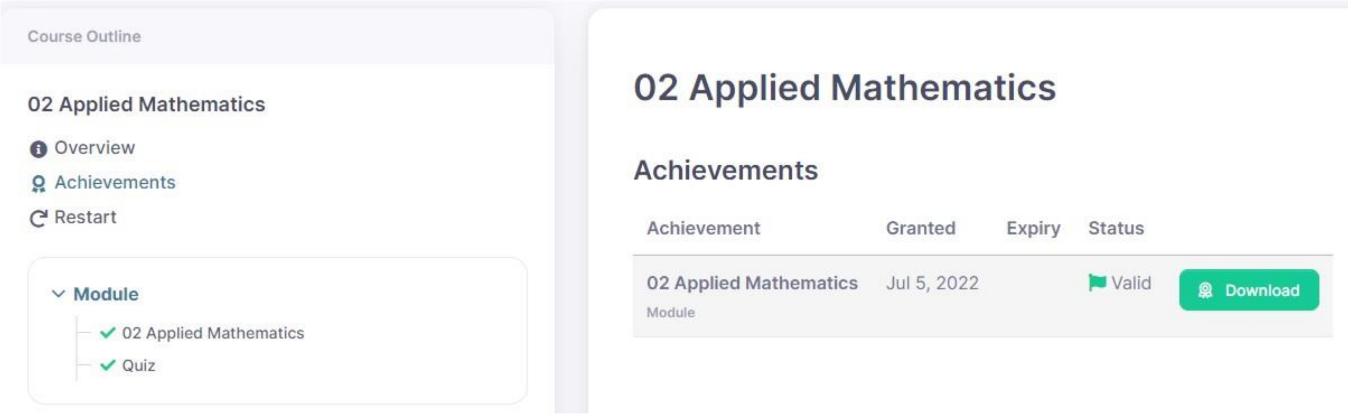
For Time-Sensitive Safety Certificates:

- Your organization may choose to <u>track your required safety tickets</u> in CMDS.
- If your required/assigned TSSC is <u>expired or not complete</u> it will show in your 'Training Plan'.
- You <u>cannot</u> 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 achievement. Once you sign off on that achievement, 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 achievement.
- **Red flags** mean you have not yet signed off on or completed that achievement.
- **Green flags** mean you have completed reviewing the achievement and signed off.

- Access **"e-Learning"** from the 'Shortcuts' tab on the home page OR scroll down to your 'Learning Portal' and click **"e-Learning Modules"** under 'Achievements'.
- You will see a list of the available modules open in a new screen or tab – modules are displayed alphabetically.
    - You can also search by category by expanding the **"Module"** 'Categories' and clicking on the name of the category you are looking for.
- To access a module, click the title and register for the course by clicking **"Start"**.
- The module will then display.
    - NOTE: Modules can contain multiple lessons and multiple quizzes.
- You then review the lesson content 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"**.
- You will get a confirmation message asking you to confirm your submittal. Click **"Confirm"**.
- 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 when viewing the quiz, click **"Return to Course Outline"**.
- To return to the list of available modules, click the company logo in the top left corner.

- From the list of available eLearning modules, you can search for a specific module using the **"Search catalog"** bar.
- Type in a keyword related to your search and click the magnifying glass, **"Search"**.

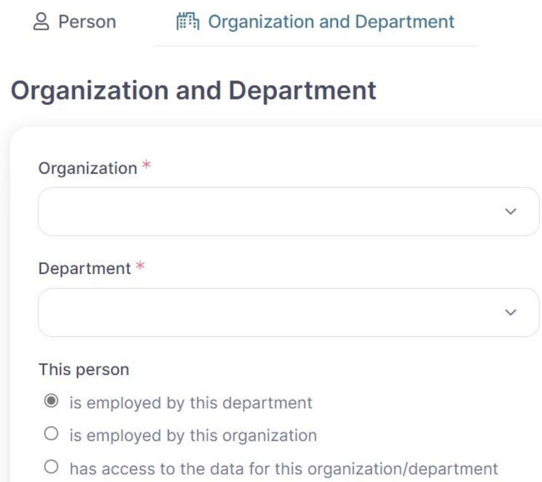
- Once you have searched for something you **MUST** clear your search criteria to obtain the full list of available modules again.

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 **"My Education & Training"** in CMDS.
- There is **NO FEE** per module and users can "enroll" in 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.
    - We encourage the use of these browsers with CMDS:
        - Microsoft Edge
        - Google Chrome
        - Firefox

Adding New Users to CMDS

- Click on **“People”** under ‘General’.
- Expand **“Criteria”** and 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 **“Add New Person”**.
- Enter the person’s information – first name, last name, and email are **mandatory** fields.
- Click the **“Organization and Department”** tab. Use the dropdowns to select the user’s organization 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 organization”** if the user needs access to the organization/ department but should not show up on reports (e.g., an administrator that needs access to multiple departments but should not show up on the reports).
    - Select **“has access to the data for this organization/department”** for individuals not employed with the organization (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 **“Yes – Add 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 and change the status to **“Approved”.**

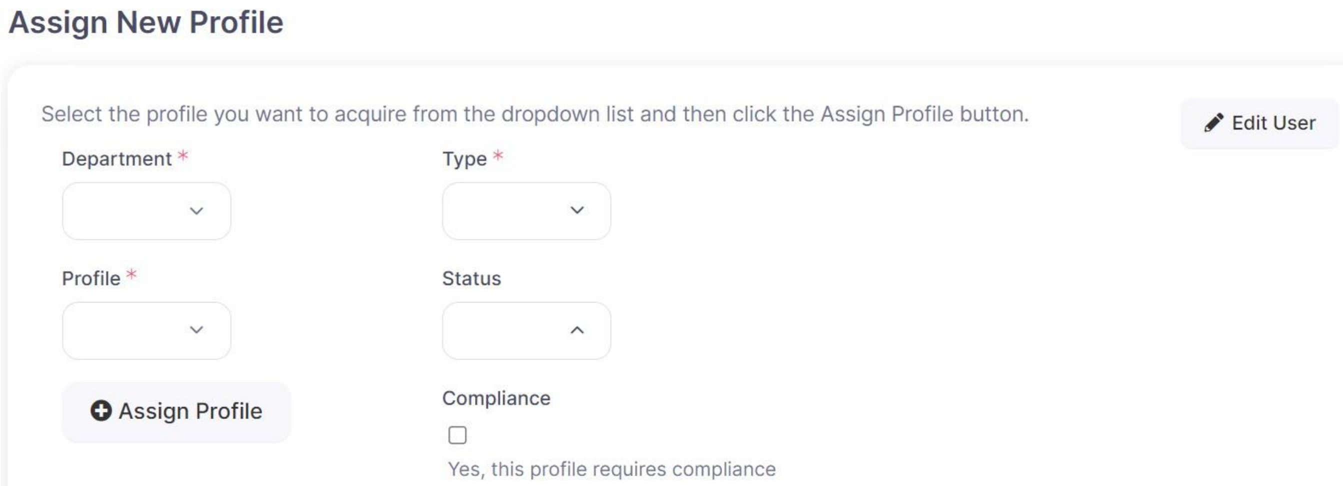
- Click the ‘Groups’ tab. Check the appropriate user group for that user. Everyone should be assigned to the **“CMDS Worker”** user group.
- Click the ‘Details’ tab and click the **“Enable email notification for this person”** box.
- Click **“Save”**.

Click on each tab to enter the appropriate information following the steps below:

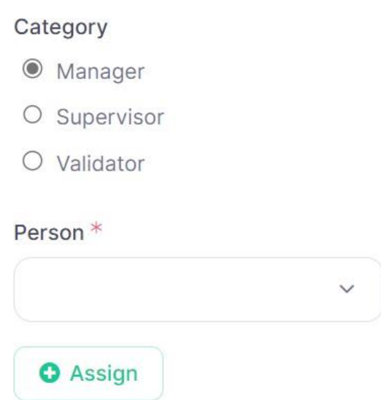
- Click the ‘Primary Profiles’ tab to assign the user a profile.
- Click **“Assign a primary profile”**.
- Select the **department** you have assigned them to and select the **profile** you would like to assign them. For primary profiles, choose **“Primary”** in the ‘Type’ drop down.

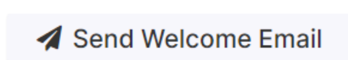
- NOTE: Primary profiles match the job the user is currently doing most of their time.

- 'Status' can be left blank. If you would like the profile to show in the user's Training Plan, choose **"In Training"**
- Click **"Assign Profile"**
- 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"**.



- Click the 'Managers and Validators' tab to assign the appropriate manager/supervisor/validator.
- Use the radio button to select **"Manager"**, **"Supervisor"**, or **"Validator"**.
- Use the dropdown to select the person to be in that role for the new user.
- Click **"Save"**.
- For the user to access the system, **you must send them their login information**. Ensure the **"Enable email notification for this person"** box is checked off.
- Click **"Send Welcome Email"**, a new page will pop up with the automated email generated. You can add content to the email or additional recipients.
- Click **"Send"**.



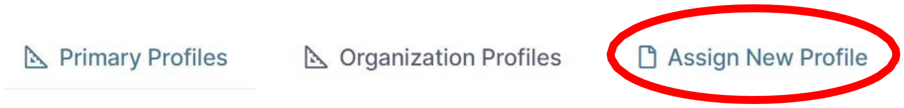


Modifying Profiles Assigned to Users:

- Click on **"People"** under 'General'.
- Expand **'Criteria'** and enter the name of the user whose profiles you would like to modify.
- Once you locate the user on the list, click **"Profiles"** to the right of their name.
- Click the **"Organization Profiles"** tab. Here you can **add and remove profiles** assigned to 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 clicking the tab **“Assign New Profile”**.



- Select the department from the dropdown, the profile, if it is Primary or Secondary, and the type.
  - If the user already has a Primary Profile and you would like to assign them a different one, remove the existing primary profile 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.*

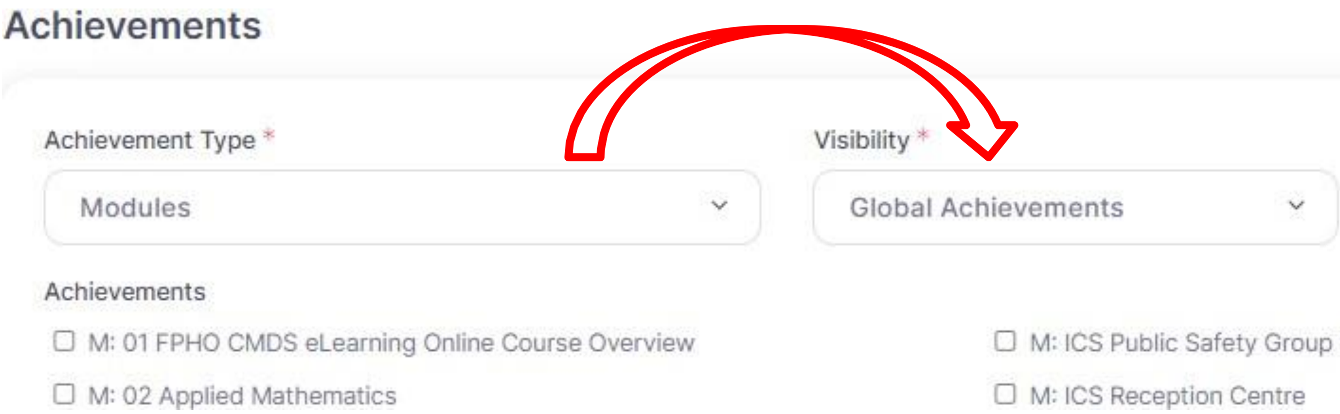
Points to keep in mind:

- Yellow exclamation signs next to a user’s name indicate the user **has not been assigned a <u>primary profile</u>**.
- **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.

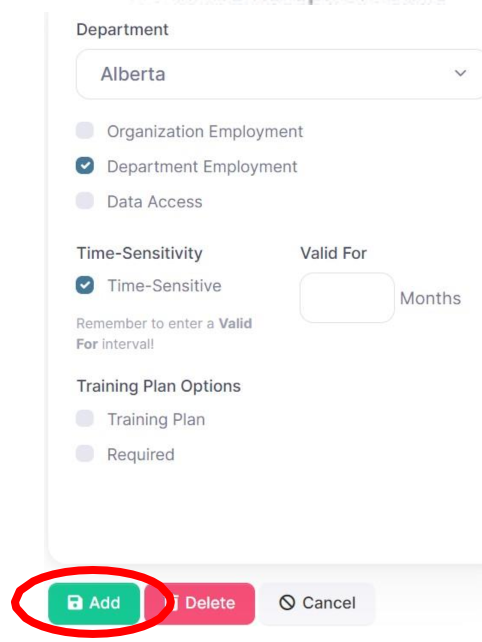
Assigning Organization-Specific Training to Individuals

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

- Login to CMDS.
- Click on **"Tools"** under 'General'.
- Scroll down, under 'Bulk Update', click **"Assign Education & Training to Learners"**.
- Select an **'Achievement Type'** (Example: SOP's, COP's)
    - For assigning CMDS eLearning modules, change the 'Visibility' drop down to **"Global Achievements"**



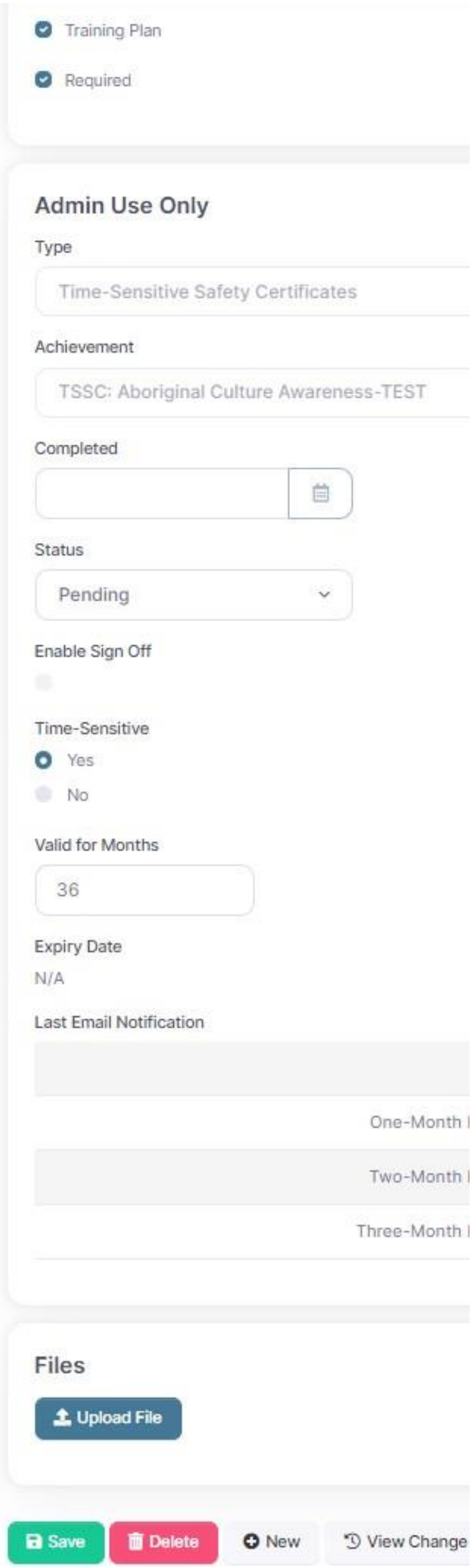
- Select a **"Category"** (this can be left blank).
- Select the achievements you would like to assign by **checking the box** beside them.
- Click the **"Users"** tab.
- Select the **department** for which you would like to assign the achievement. Check the box for the type of employment (if needed).
- You can choose to make the achievement **Time-Sensitive** by **checking the box and choosing an interval of months.**
- **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 achievement(s), click **"Add"**.



If the boxes **"Training Plan"** and **"Required"** were checked, the individual(s) will receive the assigned resource to their **"Training Plan"** and will be required to **"Sign Off"** on the achievement once they have **reviewed the associated material.**

Entering Time Sensitive Safety Certificates (Individual)

- Login to CMDS.
- Click on **"People"** under 'General'.
- Expand **'Criteria'** and search to locate the individual you would like to enter the Time Sensitive Safety Certificate for.
- Once you have located the person in the system, click **"Education"** to the right of their name.
- Scroll down to look for the Time Sensitive Safety Certificate. If it's not there, click **"Add New"** near the top of the screen.
- 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 is **"Required"**.
    - NOTE: Generally, if the certificate is **required** you should check the **Training Plan** box as well.
- Choose the name of the certificate from the **'Achievement'** drop down.
- Use the radio buttons to indicate whether or not the certificate is **'Time Sensitive'**.
- Enter the number of **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 copy of the certificate** under 'Files' by clicking **"Upload File"**.
- Click **"Save"**.



Updating an Existing Time Sensitive Safety Certificate:

- Click on **"People"** under 'General'.
- Expand **'Criteria'** and search to locate the individual you would like to enter the Time Sensitive Safety Certificates for.
- Once you have located the person in the system, click **"Education"** to the right of their name.
- Scroll to find the certificate you would like to update.

- Click on the name of the certificate (e.g., First Aid).
- Update the ‘Completed’ date to reflect the new information and change the ‘Status’ to **“Valid”**.
- You can choose to **upload a copy of the certificate** under ‘Files’ by clicking **“Upload File”**.
- Click **“Save”**.

Uploading Organization Specific Documents

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

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

NOTE: It is recommended you begin by ***converting the document to a PDF*** *and saving it somewhere you will be able to easily locate it.*

Uploading a File:

- Scroll down to your ‘Learning Portal’
- Under ‘Achievements’, click **“Upload Files & Links”**.
- Under **“Upload a File”**, click the **magnifying glass** to locate and select the document you would like to upload.
- Select the **‘Type’** of achievement from the drop down (e.g., Additional Compliance Requirements)
- **‘Category’** is <u>optional</u> and can be used to help organize the documents as seen in the examples below.
- Under ‘Achievement’, select the name from previously used achievement names OR click the keyboard to the right and type in the name.
  - NOTE: When typing in a new achievement 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 achievement; 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 achievement showing up at the competency level during a self-assessment.
- Click **“Submit”**.

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

Other Category CATEGORY

Additional Compliance Requirements TYPE

TESTING JAN 2022 ACHIEVEMENT

- Testing FILE NAME

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

Uploading a Link:

- Scroll down to your 'Learning Portal'.
- Under 'Achievements', click **"Upload Files & Links"**.
- Click **"Upload a Link"** near the top.
- Paste the URL you would like to link to into the **"URL"** box.
- Give the achievement a **"Title".**
- Select the **'Type'** of achievement from the drop down (e.g., Additional Compliance Requirements).
- **'Category'** is <u>optional</u> and can be used to help organize the documents as above.
- Under 'Achievement', select the name from previously used achievement names OR click the keyboard to the right and type in the name.
    - NOTE: When typing in a new achievement name, you do not need to include the prefix, the system will add that automatically.
- You can load more than one link under a single achievement; 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', click on the drop down.
- In the **"Keyword"** box, type in the competency number and click **"Filter"**.
- Click the radio button beside the competency to select it.
- Click the **"+"** to the right to add multiple competencies.
- Click **"Submit"**.

Adding a New Time Sensitive Safety Certificate (TSSC) Title:

Please contact your account manager or “CMDS Administration” (admin_cmds@keyera.com) and we will create it for you.

Updating Organization Specific Documents

There are two ways to update organization specific achievements:

Option 1

- Scroll down to your 'Learning Portal' and click **"Upload Files & Links"**.
- Upload the new file.
  - IMPORTANT: The file name must be exactly the same as the existing file name in order to successfully override.
- Ensure the box beside **"Overwrite this file if it already exists"** is checked off.
  - *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 achievement after it has been updated.
- 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

- Under 'Libraries' on the side bar, click **"Achievements"**.
- Expand **"Criteria"** and search for the achievement you would like to update.
- Click on the **"Title"** and click **"Upload"** under 'Downloads'.
- 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 attachment.
  - We recommend you refresh your browser then check the document to make sure it was successfully replaced.

CMDS Available Reports

- Login to CMDS.
- Click **“Reports”** under ‘General’.
- 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 drop down, check the boxes, and click **“OK”**.
- The check box at the very top of the criteria list can be used to select/deselect all options.
- Use the ‘Departments’ drop down to select the department(s) you would like to run the report on.
- Use the ‘Employees’ drop down to either leave **“All Employees”** or check the boxes for the employee(s) you want to run the report on.
- When running the report on profiles, choose whether you would like the report to “View primary profiles only”, “View profiles that require compliance”, or “View one specific profile”.
- Click **“Report”** on the bottom left.
- To **export** the report from the system, click **“Download”**.

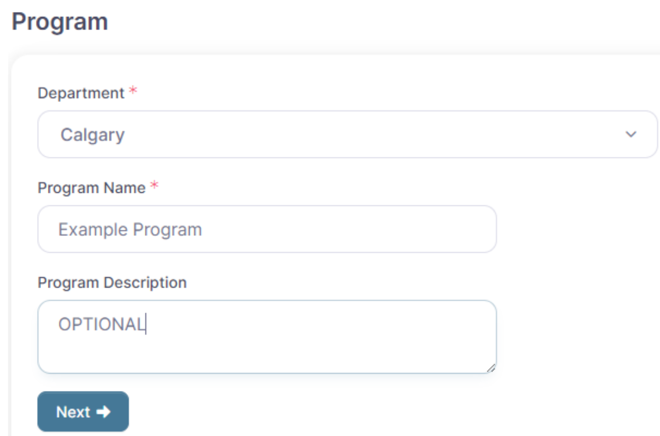
Companies interested in setting up an API should contact admin_cmds@keyera.com. Please note that there is an additional one-time fee for the API (application programming interface).

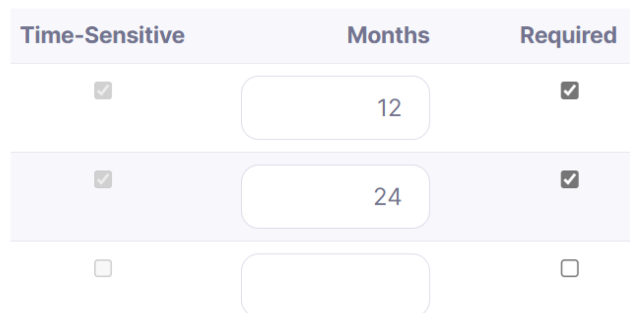
Programs

Creating a New Program

From your CMDS home page:

- Click **“Programs”** under ‘Libraries’.
- Click **“Add New Program”**.
- Select the Department from the drop down.
- Under ‘Program Name’, **type in the name of your program.**
    - OPTIONAL: Type in a program description.
- Click **“Next”**.
- Select the achievements you would like to add to the program by **checking the boxes next to the achievement.** You can toggle the display by clicking the radio buttons next to ‘Group By’.
- Click **“Next”**.
- Enter the monthly interval for any achievements that are time sensitive. 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 achievements with no expiry, leave the “Months” box empty.
- Please make sure the required box is checked for the achievements that are required.
- Click **“Save”**





Editing an Existing Program

From your CMDS home page:

- Click **“Programs”** under ‘Libraries’.
- Expand **“Criteria”** and search for the program you would like to edit.
- Under “Results”, click the **name** of the program.
- To edit the achievements in the program, expand the **“Achievements”** tab.
- To edit the settings of the program, expand the **“Settings”** tab.
- Once you have made your changes, click **“Save”**.

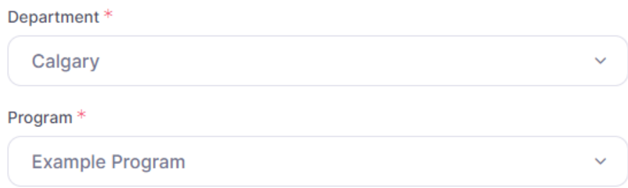
- To duplicate the program for use in another department, click **“Duplicate”**.
- Select the new **department** you would like to add the program to.
- **Rename it.**
- Click **“Next”.**

- Review the list of achievements to see which achievements can be transferred over to the new program in the new department.
    - The **red "!"** indicates that the achievement is not assigned to that department and will not carry over in the program.
    - The **green checkmark** indicates that the achievement is assigned to that department and will carry over in the program.
- Click **"Save"**.
- Click the **"Settings"** tab and edit the settings of the achievements as needed.
- Click **"Save"**.

Assigning Programs

From your CMDS home page:

- Click **"Tools"** under 'General'.
- Under 'Bulk Update', click **"Assign Programs to People"**.
- Select the **department** from the drop down.
- Select the **program** from the drop down.
- Check/uncheck the box next to people's names as required.
- Click the radio button that provides the answer that applies to you for the question *"What do you want to do with training and education items already assigned to each of the learners you have selected above?"*
- Click **"Next"**.
- Review, then click **"Save"**.



Setting Up Email Notifications

From your CMDS home page, click **“Tools”**.

Step 1

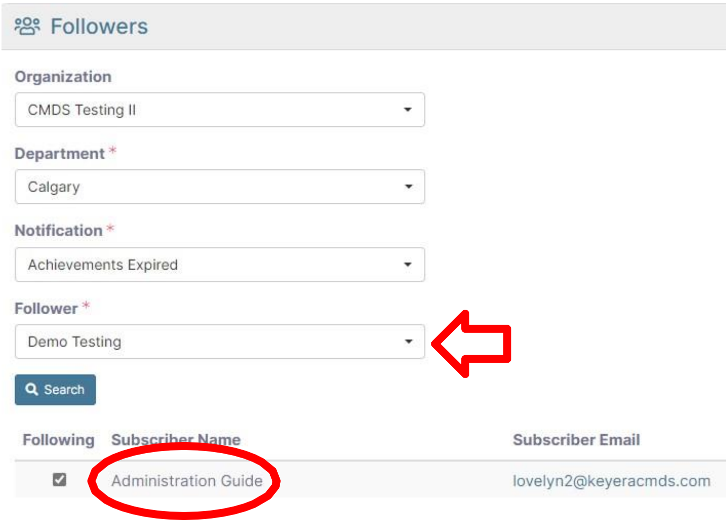
Start with setting up the **Email Notification Subscribers** for the individuals in the department.

- Under ‘Accounts’, click **“Notification Subscribers”**.
- Select the **“Department”** using the drop down.
- Choose “Organization” and/or “Department” employment by checking the box.
- Select the type of notification you would like to set up using the drop down.
- Click **“Search”**.
- **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 the “Home” in the top left to return to your home page.

Step 2

Next, you can choose to set up **carbon copy email notifications.**

- Under ‘Accounts’, click **“Notification Followers”**.
- Select the **“Department”** using the drop down.
- Select the type of notification you would like to set up using the drop down.
- Select a “follower” from the drop down.
    - NOTE: 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, Demo Testing will receive carbon copy notifications for Administration Guide on all “Achievement Expired” notifications.

Troubleshooting a User's Password

When logging into CMDS for the first 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 **"People"** under 'General'.
- Search for the user and click on their name.
- Under the **"Login"** tab, click **"Reset Password"**.
- Click **"Save"**.
- Inform the user of their reset password.

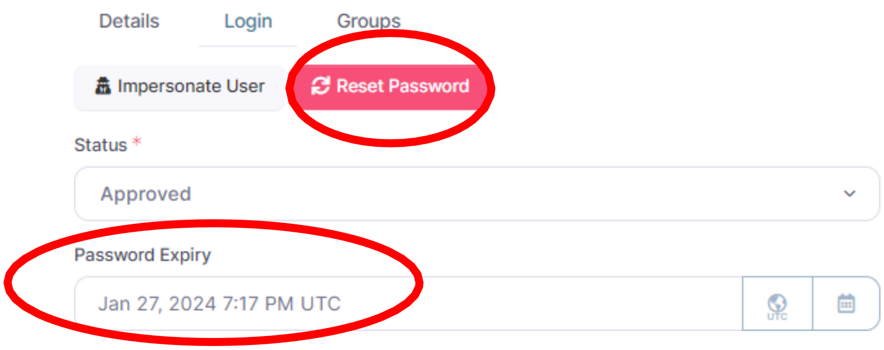
The user will then be able to login once using cmds246 and will be prompted to **change their password,** again to a password of their choice.

This temporary password has a very short expiry date. If they do not login before this password expires, you will have to reset it again so that the "Password Expiry" date resets.

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

You can see a user's expiry date by:

- Go to **"People"** under 'General'.
- Search for the user and click on their name.
- Under the **"Login"** tab 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 https://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 https://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 finish your self-assessments prior to attending the Validator Course.

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