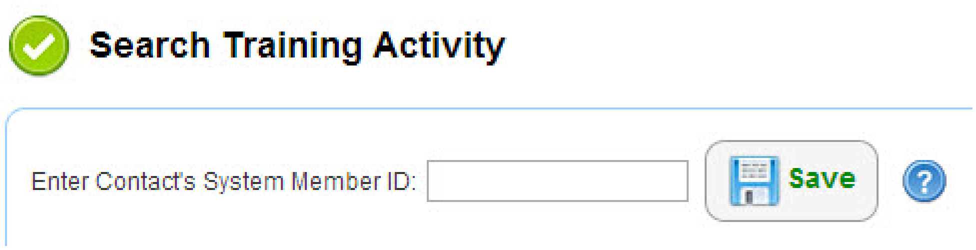
How Do I Track Training Completion for My People?

When a Training Page has Training Completed links, clicks of those links are tracked in the Contact Details Page, Contact Activity Tab if the person's System Member ID is associated with a Contact record. If the person's System Member ID is not associated with a Contact record, clicks of the Training Completed links are not tracked.

Below are the steps you should take to track the training completion steps for your people.

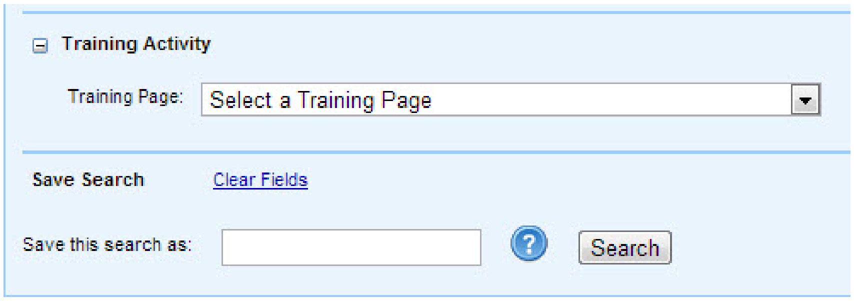
1. Add your people (who are also Members in the System) as contacts to the back office.
2. Ask your people to tell you their System Member IDs.
    - Your Contact can find his/her System ID in the Contact Management System back office. Tell your Contact to click the **Go To My User Settings** link on the back office home page, and then click the **My Email Profile** link. The Member ID displays at the bottom of the *My Email Profile* page.
3. Open the *Contact Details* page for your person.
    - Click **My Contacts** on the main menu, and do a simple search by name, email address or phone number. Enter the value you want to search on in the Search For textbox, and select the value type from the corresponding drop-down. Click the Go button to submit your search. Click the Name link in the search results table to open the *Contact Details* page for that contact.
4. On the *Contact Details* page, click the *Contact Activity* Tab, scroll down to the Training Activity section. Enter your person's System ID in the "Enter Contact's System Member ID" textbox and click the **Save** button.



How Do I Use Advanced Search to Find People Who Completed Training Steps?

1. Click **My Contacts** on the main menu, and then click the **Advanced Search** link.
2. The Advanced Search - Training Activity section has a **Training Page** drop-down that includes all of the Training Pages that have a "Training Completed" link inserted on them. Select the Training Page in the drop-down that you want to search for completed steps for.
3. After you select a Training Page, the Step drop-down will display so you can select the Training Step for that page.
4. After you select a Step, the Activity Time Frame will display so you can select the time frame for your search.
5. Click the Search button to perform your search.

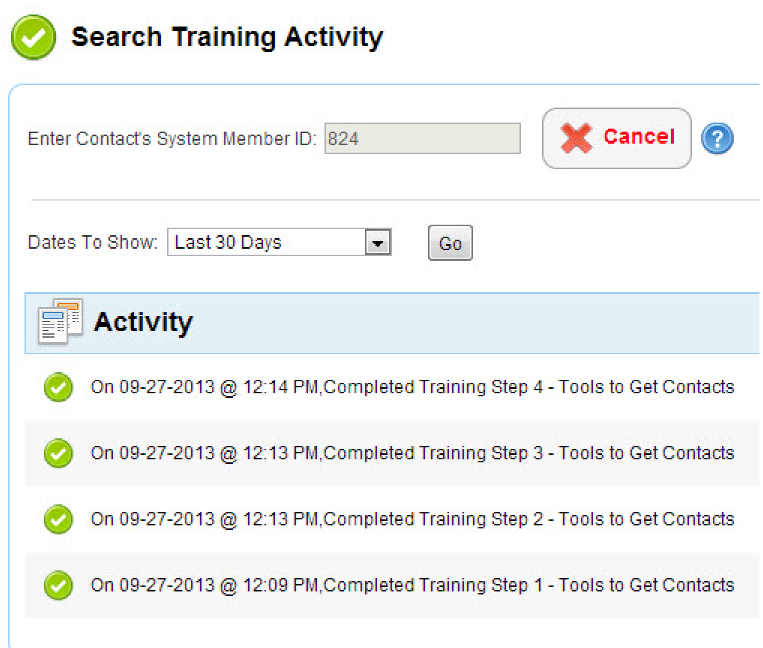
- You can save the search by entering a Name for the search in the “Save this Search as” textbox before clicking the Search button. When you save a search, a link for the search will appear in the Saved Searches list on the left hand panel of the *Manage Contacts* page.



Search Results: The Search Results will show all Contacts who completed that Step on that Training Page in that time frame.

How Do I View All the Completed Training Steps for a Contact?

1. Open the *Contact Details* page for your person.
   - Click **My Contacts** on the main menu, and do a simple search by name, email address or phone number. Enter the value you want to search on in the Search For textbox, and select the value type from the corresponding drop-down. Click the Go button to submit your search. Click the Name link in the search results table to open the *Contact Details* page for that contact.
2. On the *Contact Details* page, click the *Contact Activity* Tab, and scroll down to the Search Training Activity section.
3. You can filter the time frame for information that appears in the Activity table using the Dates to Show drop-down.
4. The training activity table will display, the date/time the training step was completed, the Training Step number and the Training Page Name.



IMPORTANT NOTES:

- When the same Training Completed link is clicked multiple times on a Training page by a Contact, the Contact record will update to just save and display info the latest click of that link only.
- The Member ID can be removed and the empty Member ID textbox saved to break the connection between the Contact Record and the Member ID. Once the connection is broken, all the previously saved training completion activity will be removed from the Contact record. Just click the Cancel button on the *Contact Details* page, *Contact Activity* Tab, Training Activity section to break the connection.
- The Member ID can be replaced with another Member ID. When the Member ID is replaced, the connection to the old Member ID is removed and the connection to the new Member ID is saved.