

# SOLABS QM10 TRAINING Section: Using the Training Administration Menus to Manage Training Activities

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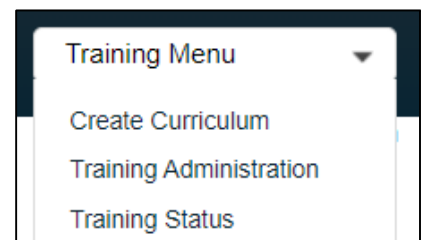
## Accessing the Training Administration Menus

Access to the Training Administration Menus requires the **SOLABS Training Administrator** role assignment. After logging into **SOLABS QM10**, click on **TRAINING** from the Main Menu.



From the Quick Access **Training Menu**, all Users have access to see their current assignments and status by choosing the **Training Status** option.

Users with the System Role **SOLABS Training Administrator** have the additional menu options for **Create Curriculum** and **Training Administration**.



Training administration functions can be performed from within an existing **Curriculum** or **Training Activity** and also through the general **Training Administration** menu options. This document covers the use of the Training Administration menu options. Refer to the separate document titled **SOLABS QM10: Guide for Training Administrators** for information on managing training from within a Curriculum or a Training Activity.

After choosing Training Administration, the Training Administration page appears, defaulting to the first menu option of View by Job Title. The other options are available on the right-hand menu.

Training > Training Administration > View by Job Title

**Job Title**

Available Job Titles:

**Training Activities**

Assigned:  
 <empty>

**Job Title Profiles Actions**

- View by Job Title
- Modify by Job Title
- View by Training Activity
- Modify by Training Activity

**End User Assignment Actions**

- View by End user
- Assign by End User

**External Record**

- Record for End User

## Training Administration Menu Options | Overview

The table below provides a high-level overview of each of the Training Administration menu options.

Job Title Profiles (FCT Roles) Actions	Description
<b>View by Job Title (Function Role)</b>	This option provides a <i>non-editable</i> list of all <b>Training Activities</b> that are linked to the selected <b>Job Title</b> (Function Role).
<b>Modify by Job Title (Function Role)</b>	This option provides the <b>same list as the above</b> option but will now be <i>editable</i> so that the information can be modified – such as adding or removing a Training Activity link from the Function Role.
<b>View by Training Activity</b>	This option provides a <i>non-editable</i> list of all <b>Job Titles</b> (FCT Roles) that are linked to the selected <b>Training Activity</b> .
<b>Modify by Training Activity</b>	This option provides the <b>same list as the above</b> option but will now be <i>editable</i> so that the information can be modified – such as removing or adding a Function Role link from the Training Activity.
End User Assignment Actions	Description
<b>View by End User</b>	This option provides a <i>non-editable</i> list of active <b>Training Activity</b> assignments for the selected <b>User</b> .
<b>Assign by End User</b>	This option provides the <b>same list as the above</b> option but will now be <i>editable</i> so that the information can be modified – such as checking for

**Job Title Profiles Actions**

- View by Job Title
- Modify by Job Title
- View by Training Activity
- Modify by Training Activity

**End User Assignment Actions**

- View by End user
- Assign by End User

**External Record**

- Record for End User

	training required by their assigned Function Roles but not yet assigned.	
<b>External Record</b>	<b>Description</b>	
<b>Record for End User</b>	This option allows the Training Administrator to apply training credit for one or more assignments for a selected User.	

## Training Administration Menu Options | Detail

### View by Job Title

When you choose the **View by Job Title** option, you will be able to select from a drop-down list of **Available Job Titles**. This is a list of all of the active Function Roles for your organization.

When you choose a **Job Title** a list of all the **Training Activities** currently linked to that Function Role will be displayed in the **Assigned** box. These Training Activities would be available to assign to Users with the chosen Function Role. This list is not editable; it is provided for informational purposes.

The Name column includes the Training Activity Name, followed by the associated Curriculum Name. Estimated Start Date, Estimated End Date and the current Status of the Training Activity is also displayed.

**Job Title**

Available Job Titles:

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- Administrative Coordinator
- Associate Director Quality Assurance
- Auditor - QA Compliance
- Biostatistician
- Change Control Coordinator
- Clinical Operations
- Complaint Coordinator
- Director Clinical Operations
- Director Clinical Quality Assurance
- Director Drug Safety
- Director Engineering
- Director Finance
- Director Human Resources
- Director IS/IT
- Director Manufacturing
- Director Quality
- Director Regulatory Affairs
- Director Research & Development
- Director Safety, Health & Environment

**Job Title**

Available Job Titles:

Complaint Coordinator

**Training Activities**

Assigned:

Name	Est. Start	Est. End	Status
Classroom Training for Accident and Incident [...] <b>Curriculum Name:</b> Accident and Incident Reporting	25-Feb-2019		Active
Confirmation of Electronic Signature Certific[...] <b>Curriculum Name:</b> Employee Orientation	16-May-2017		Active
GDP HR Policies <b>Curriculum Name:</b> Employee Orientation	16-May-2017		Active
Policy POL-SHE-001, Accident and Incident Rep[...] <b>Curriculum Name:</b> Accident and Incident Reporting	25-Feb-2019		Active
SOP COP-003 <b>Curriculum Name:</b> QAC-002 Product Complaint Management	05-Oct-2017		Closed
SOP QAC-002 <b>Curriculum Name:</b> Curriculum_QAC-002_3.0_V.3.0	09-Oct-2017	30-Nov-2017	Closed
SOP QAC-002 <b>Curriculum Name:</b> Curriculum_QAC-002_4.0_V.4.0	16-Nov-2018		Closed
SOP QAC-002 <b>Curriculum Name:</b> Curriculum_QAC-002_5.0_V.5.0	08-Aug-2019		Active
cGMP Booklet Knowledge Assessment <b>Curriculum Name:</b> Employee Orientation	16-May-2017		Active

## Modify by Job Title

When you choose the **View by Job Title** option, you will be able to select from a drop-down list of **Available Job Titles**. This is a list of all of the active Function Roles for your organization.

In this case, you will also have options to **Filter Activities by** Curriculum Name, Training Activity Name, Training Category, Status or Date. This allows you to easily locate the particular Training that you would like to add as requirements for the Function Role. You will be warned if your search brings back too many Training Activities to display. In that case, get more specific with your search criteria using Name or Category fields.

Depending on the filter criteria, clicking the Filter button will list the Training Activities in two categories:

- The upper **Available** table/box contains **Training Activities** that meet the search criteria but are **NOT** currently linked to that **Job Title**. By selecting one or more Training Activities and clicking the **+ADD** button, you can move them to the **Assigned** list.
- The lower **Assigned** table/box contains **Training Activities** that are currently linked to that **Job Title** but that you may wish to **Remove**. It will also include any that you select to ADD from the upper table/box.

### Job Title

Available Job Titles:

Complaint Coordinator ▼

### Training Activities

Filter Activities by:

Curriculum and/or Activity name  
 Date

Curriculum Name Contains:       Activity Name Contains:

Category: 

All ▼

      Status:  Active

Scheduled Within :

Creation Date  
 Estimated Start Date  
 Estimated End Date

Filter

Available Training Activities are ordered by Activity Name

Available:

Name	Est. Start	Est. End	Status
<input type="checkbox"/> GDP Medical Products - Company Overview Curriculum Name: Employee Orientation	16-May-2017		Active
<input type="checkbox"/> Introduction to GMPs Curriculum Name: Employee Orientation	16-May-2017		Active
<input type="checkbox"/> SOLABS QM 10 - Introduction for General Users Curriculum Name: Employee Orientation	16-May-2017		Active
<input type="checkbox"/> Safety Orientation Curriculum Name: Employee Orientation	16-May-2017		Active

Select all   Deselect all

+ADD

Assigned:

Name	Est. Start	Est. End	Status	
Classroom Training for Accident and Incident [...] Curriculum Name: Accident and Incident Reporting	25-Feb-2019		Active	Remove
Confirmation of Electronic Signature Certific[...] Curriculum Name: Employee Orientation	16-May-2017		Active	Remove
GDP HR Policies Curriculum Name: Employee Orientation	16-May-2017		Active	Remove
Policy POL-SHE-001, Accident and Incident Rep[...] Curriculum Name: Accident and Incident Reporting	25-Feb-2019		Active	Remove
SOP COP-003	05-Oct-2017		Closed	Remove

Remove all

Submit      Cancel

### View by Training Activity

When you choose the **View by Training Activity** option, you will have options to **Filter Activities by** Curriculum Name, Training Activity Name, Training Category, Status or Date. When you set the filter criteria and then click on the **Filter** button, the **Training Activities** that meet the criteria will be listed in the **Available** drop-down list.

#### Training Activities

Filter Activities by:

Curriculum and/or Activity Name  
 Date

Curriculum Name Contains:

Activity Name Contains:

Category:

Status:

Active  
 On Hold  
 Not Started

Scheduled Within :

Creation Date  
 Estimated Start Date  
 Estimated End Date

between:   Clear and:

Available Training Activities are Ordered by Estimated Start Date

Available :

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SOP COP-002 Clinical Protocols and Checklists - Review and Approval - Active - 2018-10-05

SOP QA-001, Batch Record Review - Pharmaceutical Products - Active - 2018-10-05

Choosing a **Training Activity** from the list displays the list of **Job Titles** (Function Roles) that the Training Activity is currently linked to.

Available :

**View**

Assigned:

Associate Director Quality Assurance

Clinical Operations

Clicking the **View** option underneath the selected **Training Activity** will display the related **Curriculum Details** and **Training Activity Details** screen if you need to view or modify the Training Activity.

## Modify by Training Activity

Using the **Modify by Training Activity** option you are able to search for a specific Training Activity – as described above and then add/remove linked **Job Titles** (Function Roles).

- The upper **Available** table/box contains **Function Roles** that meet the search criteria but are **NOT** currently linked to that **Training Activity**. By selecting one or more Function Roles and clicking the **+ADD** button, you can move them to the **Assigned** list.
- The lower **Assigned** table/box contains **Function Roles** that are currently linked to that **Training Activity** but that you may wish to **Remove**. It will also include any that you select to ADD from the upper table/box

Available :

SOP COP-002 Clinical Protocols and Checklists - Review and Approval - Active - 04-Oct-2018 UTC-04:00 ▾

[View Selected](#)

### Job Titles

Available:

<input type="checkbox"/>	Administrative Coordinator
<input type="checkbox"/>	Auditor - QA Compliance
<input type="checkbox"/>	Biostatistician
<input type="checkbox"/>	Change Control Coordinator
<input type="checkbox"/>	Clinical Data Coordinator
<input type="checkbox"/>	Complaint Coordinator
<input type="checkbox"/>	Director Clinical Quality Assurance
<input type="checkbox"/>	Director Drug Safety
<input type="checkbox"/>	Director Engineering
<input type="checkbox"/>	Director Finance
<input type="checkbox"/>	Director Human Resources

Select all Deselect all

+ADD

Assigned:

Associate Director Quality Assurance	Remove
Clinical Operations	Remove
Director Clinical Operations	Remove
External Consultant	Remove
QA Specialist	Remove

Clicking the **View Selected** option underneath the selected **Training Activity** will bring you to the Training Activity itself if you need to make any modifications there.



## View by End User

The **View by End User** option is used to display a list of all **Training Activities** assigned to a selected **User**. When you select a name from the list of **Available End Users** the list of assigned Training Activities appears. For each assigned Training Activity, the list will show the Name, the associated Curriculum Name, the Estimated Start date, the Estimated End Date, the User Start Date, the User End Date (Due Date) and the current Status. This screen is for information only; no actions can be taken from it.

Training > Training Administration > View by End user

### End User

Available End Users:

- 
- 
- administrator (Default Admin)
- aingram (Abel Ingram)
- amoore (Alice Moore)
- ariver (Alan River)
- arivera (Amy Rivera)
- auditor (Auditor Account)
- bgreen (Bonnie Green)
- bgregory (Brandon Gregory)
- bramsey (Bill Ramsey)

Training > Training Administration > View by End user

### End User

Available End Users:

bgregory (Brandon Gregory) ▼

Assigned:

Name	Est. Start	Est. End	User Start	User End	Status
Classroom Training f[...]	25-Feb-2019		25-Feb-2019		Active
Curriculum Name: Accident and Incident Reporting					
GDP Performance Mana[...]	11-Apr-2019		11-Apr-2019		Active
Curriculum Name: Curriculum_POL-HR-001_3.0_V.3.0					
SOP MFG-SC-002, Rece[...]	16-Apr-2019		16-Apr-2019		Active
Curriculum Name: Curriculum_MFG-SC-002_2.0_V.2.0					

### Assign by End User

Using the **Assign by End User** option you are able to search for a specific User – as described above – and then also search for more Training Activities using one of the several Filter Activities by options.

Training > Training Administration > Assign by End User

**End User**

Available End Users:  
bgregory (Brandon Gregory)

**Training Activities**

Filter Activities by:

Job Title Profile  
 Curriculum and/or Activity name  
 Date

Curriculum Name Contains: cGMP  
Activity Name Contains:

Category: All  
Status:  
 Active  
 On Hold  
 Not Started

Scheduled Within :  
 Creation Date  
 Estimated Start Date  
 Estimated End Date

between: 01-Oct-2018  
and: 16-Oct-2018

**Filter**

When you set the filter criteria and then click on the **Filter** button, the **Training Activities** that meet that criteria will be listed in the **Available** table/box.

**Training Activities** in the **Available** section can be selected and then assigned to the User by clicking the **+ADD** button.

To remove training assignments from the user, click on the **Remove** option next to the listing in the **Assigned** box.

To also add Due Dates for the assignment, select the **Set specific dates** button. This will enable the fields for **Estimated Start and End Dates**. After clicking on **+ADD**, those will become the **User Start** and **User End** (Due) dates.

Available Training Activities are Ordered by Estimated Start Date

Use activities estimated start and end dates  
 Set specific dates

Available:  
Estimated Start and End Dates: 04-Oct-2019

Name	Est. Start	Est. End	User Start	User End	Status
<input type="checkbox"/> SOP COP-002 Clinical[...] Curriculum Name: Curriculum_COP-002_2.0_V.2.0	05-Oct-2018				Active
<input type="checkbox"/> SOP QA-001; Batch Re[...] Curriculum Name: Curriculum_QA-001_2.0_V.2.0	05-Oct-2018				Active

Select all Deselect all  
**+ADD**

Assigned:

Name	Est. Start	Est. End	User Start	User End	Status	
Classroom Training f[...] Curriculum Name: Accident and Incident Reporting	25-Feb-2019		25-Feb-2019		Active	Remove
GDP Performance Mana[...] Curriculum Name: Curriculum_POL-HR-001_3.0_V.3.0	11-Apr-2019		11-Apr-2019		Active	
SOP MFG-SC-002; Rece[...] Curriculum Name: Curriculum_MFG-SC-002_2.0_V.2.0	16-Apr-2019		16-Apr-2019		Active	Remove

Remove all



## Record for End User

Training Administrators have the ability to confirm training for assigned users through a right-hand menu option within the Training Activity called **Record Training From External Record** or from the Training Administration menu using the option **Record for End User**. This is helpful for situations such as classroom training, where the participants may have signed a Training Attendance Document and that proof of completion is submitted to a Training Administrator. It is also helpful for external training, where the participants may submit a Training Certificate.

The **Record for End User** option is used to display a list of all unconfirmed **Training Activities** assigned to a selected **User**. When you select a name from the list of **Available End Users** the list of assigned but unconfirmed Training Activities appears.

Training > Training Administration > Record for End User

**End User**

Available End Users:

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**End User**

Available End Users:

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aingram (Abel Ingram)

amoore (Alice Moore)

ariver (Alan River)

arivera (Amy Rivera)

auditor (Auditor Account)

bgreen (Bonnie Green)

bgregory (Brandon Gregory)

bramsey (Bill Ramsey)

**End User**

Available End Users:

bgregory (Brandon Gregory)

**Training Activities**

Available:

Select all Deselect all

Record Date:

**Training Activities**

Available:

UG-000002 Intro to SOLABS QM 10 for General Users / 18-Dec-2018 / 22-Mar-2019 / Active  
Curriculum Name: SOLABS QM 10 General User Training

SOLABS QM 10 - Classroom Training for General Users / 18-Dec-2018 / 29-Mar-2019 / Active  
Curriculum Name: SOLABS QM 10 General User Training

Selecting one or more **Available** activities, enables the **Record Date** field.

Record Date:

+ADD

**Assigned:**

Training Activity	Record Date	
SOLABS QM 10 - Classroom Training for General Users / 18-Dec-2018 / 29-Mar-2019 / Active Curriculum Name: SOLABS QM 10 General User Training	01-Oct-2019	Remove

ned