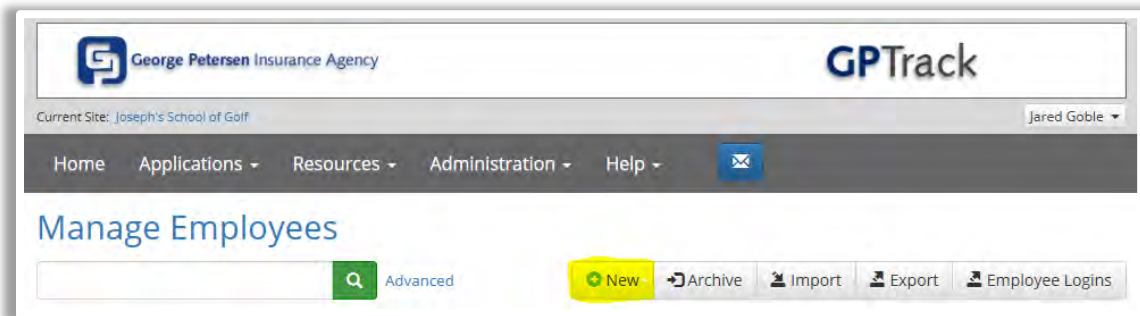


### STEP 1: INPUT EMPLOYEES

From the home Screen, Select Administration → Manage Employees



Select 'New'



The system will run you through a prompt of required information for inputting a new employee. When selecting a supervisor, this will be the person who will receive notifications on the status of the trainings. Login information can be sent to the employee after at the time of setup.

**Add employee**

General | Employment | Contact | Emergency Contact | Login | Attachments

\*First Name: jared

\*Last Name: Goble

Middle Name:

\*Department: Loss Control

\*Supervisor: Jared Goble

\*Work Email Address: jgoble@gpins.com

Work Phone: Ext:

Send Employee Portal Welcome Email

Save & Close Cancel

An employee can be setup in the system without an e-mail address. To provide the employee with their login information, input their information, and select 'Save and Close.' Then, you can select that employee from the list to 'Edit.' From the edit screen, go to the 'Login' tab, and the system will provide you with their username, password, and Company ID.

**Edit employee: Goble, Jared**

General | Employment | Contact | Emergency Contact | Login | Attachments

Company ID: 248894

Username: jaredG1

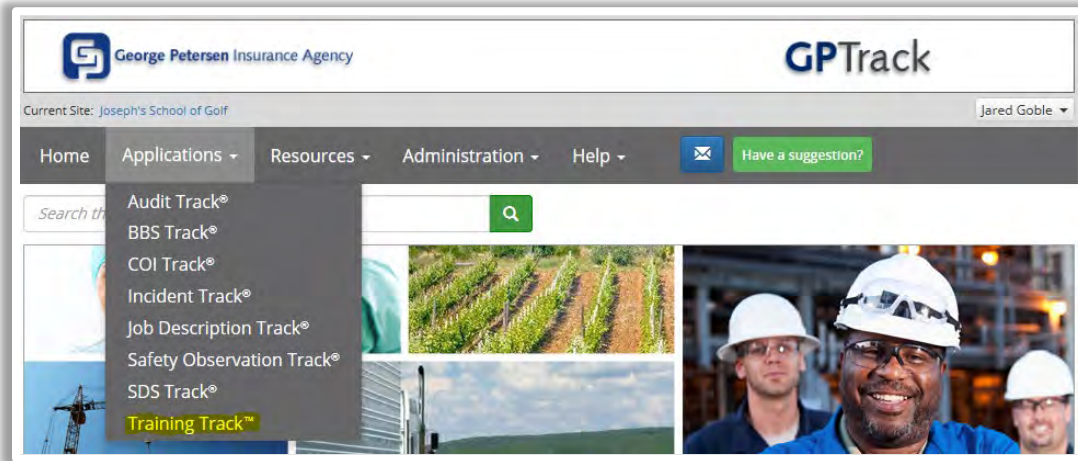
Password:

Send Employee Portal Welcome Email

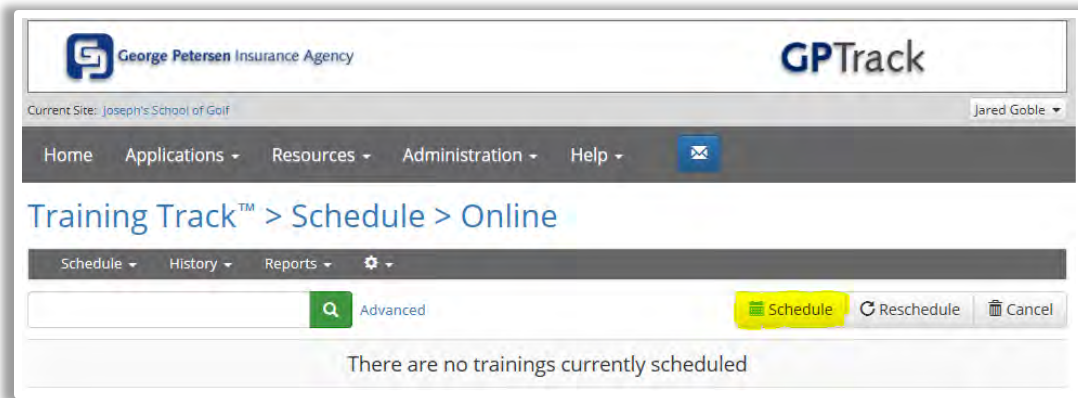
Save & Close Cancel

## STEP 2: ASSIGN THE TRAINING

From the Home Screen, Select Applications → Training Track

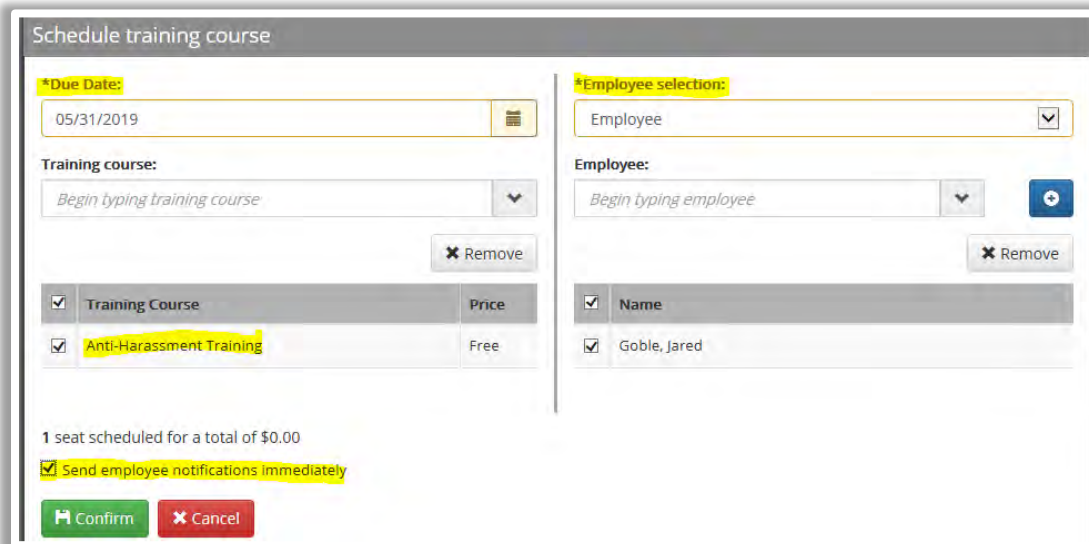


Select 'Schedule'



Upon scheduling the training, you will be able to select the due date, topic, and employee. An e-mail notification will be sent to employees once training has been assigned.

**Please note: Trainings will not show up in employee portals if the due date is assigned more than 30 days out.**



The screenshot shows the 'Schedule training course' form. It has two main sections: '\*Due Date:' and '\*Employee selection:'. The '\*Due Date:' section has a date field set to '05/31/2019'. The '\*Employee selection:' section has a dropdown menu set to 'Employee' and an 'Employee:' field set to 'Goble, Jared'. Below these sections are two tables. The first table is for 'Training Course' and the second is for 'Employee'. Both tables have a 'Remove' button next to them. At the bottom, there is a summary: '1 seat scheduled for a total of \$0.00' and a checkbox for 'Send employee notifications immediately' which is checked. There are 'Confirm' and 'Cancel' buttons at the bottom.

Training Course	Price
<input checked="" type="checkbox"/> Anti-Harassment Training	Free

Name
<input checked="" type="checkbox"/> Goble, Jared

The system will then show all assigned trainings

The screenshot shows the GPTrack interface for Jared Goble. The header includes the George Petersen Insurance Agency logo and the GPTrack title. The current site is identified as Joseph's School of Golf. A navigation bar contains links for Home, Applications, Resources, Administration, and Help. The main content area is titled 'Training Track™ > Schedule > Online'. Below this, there are tabs for Schedule, History, and Reports. A search bar with a magnifying glass icon and the word 'Advanced' is present. To the right of the search bar are buttons for 'Schedule', 'Reschedule', and 'Cancel'. A table below lists assigned trainings with columns for Employee, Training Course, Due Date, and Record. One entry is highlighted in yellow: Jared Goble, Anti-Harassment Training, 05/31/2019.

Employee	Training Course	Due Date	Record
Jared Goble	Anti-Harassment Training	05/31/2019	

Employees will access trainings via the [Employee Portal Login](#), and will only have access to trainings that have been assigned to them. To access the Spanish version of the training, use the highlighted dropdown below to toggle between English and Spanish.

The screenshot shows the Employee Portal interface for Jared Goble. The header includes the Employee Portal logo and the title 'Succeed Management Solutions, LLC'. The current user is identified as Jared Goble. A navigation bar contains links for My Tasks, Announcements, and Safety Data Sheets. A language dropdown menu is visible, with 'Español' highlighted. The main content area is titled 'My Tasks'. Below this, there are tabs for 'Upcoming Tasks' and 'Completed Tasks'. A table below lists assigned tasks with columns for Name, Type, and Due Date. One entry is highlighted in blue: Anti-Harassment Training, Online Training, 7/23/19.

Name	Type	Due Date
Anti-Harassment Training	Online Training	7/23/19

*If you have questions/issues during this process, please contact our systems administrators:*

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