

## Online Training Tool – Quick Reference Guide – Kinder Morgan Core Training (JS-45763)

### Step 1: Adding Employees and Requesting ISN ID Cards in ISNetworld:

Before your contractor employees can complete the Kinder Morgan Core Online Training requirement, the employees must first be entered in the Employee Information section of ISNetworld *by the contractor*. Please follow the steps below to add an employee:

1. Click **2. Employee Information & Training**
2. Click **Employees**
3. Click **Employee Information**
4. Click **+Add New Employee**
5. Enter required information under the **Details Tab**, click **Save**
  - a. **Note:** An email address must be entered for each contractor employee in order to assign them to the Online Training project
    - i. If the employee does not have an email address, a general company email address or an account administrator's email address can be entered

### Step 2: Assigning Employees to the Kinder Morgan Core Online Training Project (JS-45763):

After the applicable contractor employees have been added in the Employee Information section of ISNetworld by the contractor, each individual employee will need to be assigned to the Kinder Morgan Core Online Training Project (JS-45763)

Please follow the below steps to assign employees to the Online Training Project:

1. Click **2. Employee Information & Training**
2. Select **Project Resources/Assignment**
3. Select **Kinder Morgan** and allow the page to refresh
4. Click **View Details/Assign Employees** next to the Kinder Morgan Core
5. Use the filters to locate a specific employee (optional)
6. Click **Search**
7. Select the employee(s) you want to add to the Project from the Available box on the left and move them to the Selected box on the right by clicking **Move Available Employees**
8. Click **Save**

Please note the below when assigning contractor employees to their first Online Training Project:

1. The employee must be entered in the Employee Information section in ISNetworld by the contractor to appear in the "Available" box in the Project Assignment section.
2. The employee must have an email address entered in the Employee Information section in ISNetworld in order to be assigned to a Project with an Online Training requirement.
3. An email notification is sent to the contractor employee once they have been assigned to the Project to notify them of the Online Training requirement.
  - a. If the employee already has ISNetworld login information:
    - i. Employee receives a system notification with a link to complete Online Training
    - ii. Employee receives appropriate permissions needed to complete Online Training
  - b. If the employee does *not* have ISNetworld login information:
    - i. Employee is automatically added to the Employee Information section and is granted login access
    - ii. Employee is assigned a username and temporary password, which is indicated in the email notification
    - iii. Employee is sent an email with a link to complete the Online Training
4. A maximum of 100 employees can be assigned to the Online Training Project at once

- a. If over 100 employees are assigned, user will receive a pop-up

### **Step 3: Completing the Online Training Requirement:**

1. From **Employee Information & Training**, select **Online Training**
2. Click **Complete Online Training**
3. Under the Status column, click **Begin Training** link
4. Complete the quiz at the end of the training
5. **Note:** Click the “Finish/Complete/End/Save” button before closing the Online Training pop-up window to ensure completion of the training is registered in ISNetwork

### **Applying Credit for the Online Training Requirement:**

Kinder Morgan allows contractors to complete training in a group setting and Apply Credit in ISNetwork for the Kinder Morgan Core training. Please follow the below steps for contractor employees who *passed* the training outside of ISNetwork.

1. Click **2. Employee Information & Training**
2. Click **Project Resources/Assignment**
3. Select **Kinder Morgan** and allow the page to refresh
4. Click **View Details/Assign Employees** next to the applicable project
5. Use the filters to locate a specific employee (optional)
6. Click **Search**
7. Select the employee(s) you want to add to the Project from the Available box on the left and move them to the Selected box on the right by clicking **Move Available Employees**
8. Click **Save**
9. On the **Apply Credit tab**, select the training
10. Select the **Date** the training was passed
11. Select the employees from the Available Employees box on the left and move them to the Selected box on the right by clicking **Move Available Employees**
12. Click **Save**

### **Step 4: Print Online Training Certificate:**

When a training is in ‘Pass’ or ‘Complete’ status, the employee will have the ability to print a certificate for the training.

1. Certificate will be scaled to 8.5x11 paper in landscape format by default
2. Follow the below steps to print the Online Training Certificate:
  - a. Select **Employee Information & Training** from your To-Do list
  - b. Click the **Online Training Tab**
  - c. Select **Complete Online Training**
  - d. Click on **Passed** trainings
  - e. Select **Print Certificate**
3. The below fields are displayed on an Online Training Certificate for contractor employees:
  - a. Certificate ID (unique)
  - b. Client Logo
  - c. Client Name
  - d. Employee Name with ISN ID
  - e. Contractor Company Name with ISN ID
  - f. Training Name
  - g. Project Name
  - h. Score (in points)
  - i. Training Date

- j. Expiration Date
- k. Employee Signature
- 4. **Note:** Kinder Morgan does not require contractor employees to bring Online Training Certificates on site to show proof of training.

#### **Online Training Permissions:**

1. Online Training – Read
  - a. Access to Complete Online Training
  - b. Access to Employee Report by Project
2. Online Training – Edit
  - a. Access to Project Assignment
  - b. Access to Complete Online Training
  - c. Access to Online Training Report
  - d. Access to Employee Report by Project

#### **To-Do List Triggers:**

1. To-Do List Triggers will show next to:
  - Project Assignment
    - Triggers are tied to the Online Training - Edit CE Permission
    - To-Do List triggers will show for the following:
      - If company is connected to a Project or Site Tracker Project requiring Online Training and no employees are assigned to the site in Project Assignment
      - If the Hiring Client allows contractors to apply credit and an employee training that previously had credit applied expired
    - To-Do List Triggers will *not* show for the following:
      - If company is connected to a Project or Site Tracker Project requiring Online Training and has at least 1 employee assigned to the site in Project Assignment
      - If company is not connected to a Project or Site Tracker Project requiring Online Training
      - If the Hiring Client allows contractors to apply credit and all employee trainings are not expired
  - Complete Online Training
    - To-Do List triggers are tied to the Online Training - Read CE Permission
    - To-Do List triggers will show if a user has an Online Training in a Not Taken, Failed (with Re-take available), Incomplete or Expired status
    - To-Do List Triggers will *not* show if a user has an Online Training in a Complete/Passed or Failed status

#### **Email Notifications:**

1. **Owner Client Online Training Request**
  - a. Email is sent when a Hiring Client adds an Online Training requirement to a current project the contractor is assigned to or the Hiring Client assigns a contractor to a new project with an Online Training requirement
  - b. Sent to Admin users on the account requesting that they can assign employees to the project
2. **Project - Add Employee Notification**
  - a. Email is sent when a Hiring Client assigns a contractor employee to a project or contractor assigns an employee to a project

- b. Sent to the contractor employee that was assigned to the project requesting them complete Online Training
  - i. If the employee has login access, the email will prompt them to login and complete the Online Training
  - ii. If the employee does not have login access, the emails will contain user login credentials and will then prompt them to login to complete Online Training
- 3. **Online Training Expiration Notice**
  - a. Email is sent when a contractor employee's training has expired
  - b. Sent to the Admin users with a list of all employees that have an expired training
  - c. Sent to the contractor employee with the expired training information
- 4. **Online Training Renewal Notice**
  - a. Email is sent when a contractor employee (who has opted in to receive the email under Company Notifications) has a training that is about to expire
  - b. Sent to the Admin users with a list of all employees that have a training about to expire
  - c. Sent to the contractor employee with the information for the training about to expire

### **Running an Online Training Report**

Contractors are able to view employee Online Training completion for Kinder Morgan by following the below steps:

1. Click **Employee Information & Training**
2. Click **Online Training**
3. Click **Reports**
4. Click **Online Training Report**
5. Under **Select Report Filters**, select Show All Records, or Show Latest Record, and enter your preferred Date Range
6. Under **Select Employees**, move the necessary employees from Available Employees to Selected Employees
  - a. Note: You may use the Filter Employees link to access additional search options to filter your employee list, if needed
7. Under Online Training, **Select Owner Client** (Kinder Morgan) and **Select Job Site/Project** (Kinder Morgan Core)
8. Click **Filter**
9. Move the **Kinder Morgan Core** training from Available Online Trainings to Selected Online Trainings
10. Click **Run Report**

### **Viewing Online Training in QuickCheck:**

Contractors are able to view assigned employees' Online Training status for Kinder Morgan in QuickCheck by following the below steps:

11. Click **Employee Information & Training**
12. Click **Employees**
13. Click **Employee Information**
14. Search for an employee name
15. Click **QuickCheck**
16. Under select Data Category, click **Training**
17. Under select 3rd Party Data, click **Owner Client Specific** (Online Training)/(Contractor Side)
  - a. Columns Include:
    - i. Owner Client
    - ii. Training Name
    - iii. Status



- iv. Pass
- v. Complete
- vi. Fail
- vii. Expired