

## MMS-WQM-203

June 1, 2014

Mireaux Management Solutions

ISO/API Consulting 
Auditing 
Training 
Web QMS



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#### **1.0 PURPOSE AND SCOPE**

The Employee Certification Application is designed to act as a repository of documentation associated with various employee certifications, as well as to provide a series of reports regarding employee certification status. The purpose of this manual is to guide users through setting up, maintaining, searching for and viewing employee certifications.

- **NOTE 1:** In order to perform some of the actions below you will need to be assigned the Certification Admin and/or Certification Tech roles on Web QMS.
- **NOTE 2:** In order to perform the actions in section **4.7 Set Up An Email Reminder**, you will need to be assigned the Administrator role.
- **NOTE 3:** Depending on the customization of your Web QMS, the figures shown in this manual may not coincide perfectly with your Web QMS.

## 2.0 TERMS AND DEFINITIONS

KPI Key Performance Indicators

#### **3.0 SECURITY ROLES**

| Administrator       | Full Web QMS Enterprise Administrator. This user can edit, create, or<br>delete pages, as well as add, edit, or delete modules. Administrators can<br>also authorize users, add roles, view File Manager, clear Logs, and<br>view/clear Recycle Bin. |
|---------------------|--|
| Employee            | This user who has full access to view information on Web QMS, but limited ability to edit or create records. Employees may view or search for employee certificates.   |
| Certification Admin | This role can edit, delete, and update certification types as well as certificate information from each employee. They will receive reports for all employees and all sites.   |
| Certification Tech  | This role can edit and update certification types and user information, but<br>not delete. They will receive reports for the employees that belong to the<br>site they have been assigned to.  |

## 4.0 INSTRUCTIONS

The Employee Certification Application is located under the **Operations** Tab of the Top Menu and in the Left Menu of the **Operations** page.



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|                       |                             | SOURCES HSE IS A    | dmin                          |
|-----------------------|-----------------------------|---------------------|-------------------------------|
| Calibration           | Calibration                 | 😹 NCR               |                               |
| NCD                   | Basic Info                  | NCR Request         | Certification Types           |
| NCR                   | Calibration Status Report   | NCR Status Reports  | Certification History         |
|                       | Calibration Advanced Search | NCRs by Job Order   | Certification Advanced Search |
| Certification         | Calibration KPIs            | NCR Advanced Search | Certification KPIs            |
|                       |                             | NCR KPIs            | 🔀 Maintenance & Repair        |
| Maintenance & Repair  |                             |                     | Asset Information             |
|                       |                             |                     | Asset Inventory Log           |
| Database Management   |                             |                     | PM Status Log                 |
|                       |                             |                     | Work Order Request            |
|                       |                             |                     | View Work Orders              |
|                       |                             |                     | Advanced Search               |
| Comment or questions? |                             |                     | Maintenance KPIs              |
|                       | Database Management         |                     |                               |
| Email Us              | Database Size Report        |                     |                               |

When you SELECT the **Certification** Tab in the Left Menu of the **Operations** page or the Top Menu of the Operations Tab, you will be directed to the **Employee Certification Application** page, which should look similar to this:



## 4.1 ADD A CERTIFICATION TYPE

The Employee Certification Application stores and retains employee information for various types of employee certifications. The **Certification Type** page allows you to view and modify the kinds of certifications your company tracks.

To access the **Certification Type** page, CLICK **Certification Type** in the Left Menu or in the Top Menu of the Operations Tab.



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| ertification Types  | E Calibration               | 💩 NCR               | Certification               |
|---|-----------------------------|---------------------|-----------------------------|
|   | Basic Info                  | NCR Request         | Certification Types         |
| ertification History  | Calibration Status Report   | NCR Status Reports  | Certification History       |
|   | Calibration Advanced Search | NCRs by Job Order   | Certification Advanced Sear |
| ification Advanced Search   | Calibration KPIs            | NCR Advanced Search | Certification KPIs          |
| incation Advanced Search  |                             | NCR KPIs            | 🔀 Maintenance & Repair      |
| feation I/DIa   |                             |                     | Asset Information           |
| ication KPIs  |                             |                     | Asset Inventory Log         |
|   |                             |                     | PM Status Log               |
|   |                             |                     | Work Order Request          |
|   |                             |                     | View Work Orders            |
| omment or questions?  |                             |                     | Advanced Search             |
|   |                             |                     | Maintenance KPIs            |
| and the second se |                             |                     |                             |

The screen that opens will display a table of existing types of certifications that your company tracks and records.

| You<br>CE | 'ou are here: OPERATIONS > Certification > Certification Type CERTIFICATION TYPES |   |                      |                       |                                     |  |          |                        |                                     |
|-----------|---|---|----------------------|-----------------------|-------------------------------------|--|----------|------------------------|-------------------------------------|
|           |   |   |                      |                       |                                     |  |          |                        | Records Per Page:                   |
|           |   |   | Certification Type   | Company<br>Outsourced | Outsourced<br>Certification Company | Short Description                        | Owned By | Training<br>Recurrence | Training<br>Recurrence in<br>Months |
| Ø         | 2   | × | ASQ Quality Engineer | True                  | American Society for<br>Quality     | training interval actually 144 months    | Employee | Month                  | 99                                  |
| 2         | 2   | × | ASQ Quality Manager  | True                  | American Society for<br>Quality     | Training interval is actually 116 months | Employee | Month                  | 99                                  |

To add a new certification type, SCROLL to the bottom of the page to reach the **Add Certification Type** form. FILL OUT the fields as follows:

| Add Certification Type    |            |                  |
|---------------------------|------------|------------------|
| Certification Type:       |            |                  |
| Certification Outsourced: | C True     | ◎ False          |
| Short Description:        |            |                  |
|                           |            |                  |
|                           |            |                  |
|                           |            | .::              |
| Owned By:                 | © Employee | Company          |
| Training Recurrence:      | One Time   | C Every X months |
| Cost:                     |            |                  |
| Submit                    |            |                  |

**NOTE:** Fields marked with a red asterisk are required.

The **Add Certification Type** page contains the following fields:

• **Certification Type:** ENTER a **Short Name** for the type of certification you wish to add.



- **Certification Outsourced:** If the certification or training is administered by an outside provider, SELECT **True**. Then, another field will open to enter the name of the certification company. SELECT **False** if the certification was done on-site.
- **Short Description:** DESCRIBE briefly what the certification consists of, why it's necessary, and who has to take it.
- **Owned by:** SELECT whether this certification is paid for by the **Individual Employee** or the **Organization**.
- **Training Recurrence:** SELECT whether the training recurrence is "**One Time**" or "**Every X months**". If you select "Every X months," you will be given a chance to ENTER the **Number** of months.
- **Cost:** ENTER the **Cost** associated with obtaining the certification.

When you have entered all the necessary information to create a new certification type, CLICK **Submit**. The new certification will be added to the application and will appear on the **Certification Types** page.

## 4.2 EDIT/DELETE A CERTIFICATION TYPE (CERTIFICATION ADMIN ONLY)

In addition to adding new certification types, you can also use the **Certification Type** page to edit or delete existing certification types.

To access the **Certification Type** page, CLICK **Certification Type** in the Left Menu of the **Employee Certification Application** page or in the Top Menu of the Operations Tab.



The screen that opens will display a table of all the types of certifications that your company tracks and adds records to.



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| You are | You are here: OPERATIONS > Certification > Certification Type CERTIFICATION TYPES |                      |                       |                                     |  |          |                        |                                     |
|---------|---|----------------------|-----------------------|-------------------------------------|--|----------|------------------------|-------------------------------------|
|         |   |                      |                       |                                     |  |          |                        | Records Per Page:                   |
|         |   | Certification Type   | Company<br>Outsourced | Outsourced<br>Certification Company | Short Description                        | Owned By | Training<br>Recurrence | Training<br>Recurrence in<br>Months |
|         | ×   | ASQ Quality Engineer | True                  | American Society for<br>Quality     | training interval actually 144 months    | Employee | Month                  | 99                                  |
| 2       | ×   | ASQ Quality Manager  | True                  | American Society for<br>Quality     | Training interval is actually 116 months | Employee | Month                  | 99                                  |

CLICK the **Manage** button next to the certification type you wish to edit. The screen will refresh.

Now SCROLL down to the bottom of the page. The **Add Certification Type** form will appear below the list of the certification types. The form will be pre-populated with information pertaining to the certification type you wish to edit.

| Add Certification Type    |                                  |                         |  |  |
|---------------------------|----------------------------------|-------------------------|--|--|
| Certification Type:       | TWIC                             |                         |  |  |
| Certification Outsourced: | C True                           | False                   |  |  |
| Short Description:        | Transportation<br>Idenitfication | 1 Worker<br>1 Card<br>: |  |  |
| Owned By:                 | Employee                         | © Company               |  |  |
| Training Recurrence:      | One Time                         | Every X months          |  |  |
| Training Interval:        | 60                               |                         |  |  |
| Cost:                     |                                  |                         |  |  |
| Submit                    |                                  |                         |  |  |

EDIT the **fields** as needed and CLICK **Submit** to save the information and continue. To delete a certification type, CLICK the **Red X Delete icon** next to the certification type you wish to delete.

#### 4.3 FILLING OUT A USER PROFILE (ADMIN ONLY)

Before you add employee certification data to the Employee Certification Application, it is important to make sure that the employees for whom you are adding information have their Web QMS user profiles completely filled out. If an employee has an incomplete user profile, their certifications may not show up under certain Advanced Search parameters, preventing managers from accurately gauging how many employees in their departments need training. (For more on Advanced Search, see section **4.5 Advanced Search**.)

For example, let us say that you add a Forklift Training certification for an employee in the Shipping Department, but forget to make sure that the employee's user profile indicates he/she works in the Shipping Department. When the Shipping Manager searches for employees in the Shipping Department with expired certifications, the expired Forklift Training certification will not show up in the results,



because Web QMS lacks information about which department the employee works for. The Shipping Manager may not realize that the certification has expired, creating a potentially dangerous situation. You can avoid this sort of error by referring to the Web QMS Maintenance Manual's **User Access** section.

To access the **User Accounts** page, activate Edit mode Web QMS, then CLICK the **User Accounts** link, located under the **Admin** Tab of the Top Menu of Web QMS.



#### The following page will appear:

| You are here: Admin > Us | er Accounts<br>unts |            |           |              |                          |                       |            |
|--------------------------|---------------------|------------|-----------|--------------|--------------------------|-----------------------|------------|
|                          |                     |            |           | Username     | Search                   |                       |            |
|                          | A B C D             | EFGH       | іјукем    | N O P Q R S  | T U V W X Y Z All Online | Unauthorized Deleted  |            |
|                          | Username            | First Name | Last Name | Display Name | Email                    | Created Date          | Authorized |
| 2 B 😒                    | aclavo              | Alona      | Clavo     | Alona Clavo  | hr@mireauxms.com         | 11/21/2013 9:25:58 AM | Ӯ          |
| 2 🛙 🎕                    | adamsticklus        | Adam       | Sticklus  | adamsticklus | adam@mireauxms.com       | 9/8/2013 6:49:45 PM   |            |
| 2 🗑 🛳                    | AlenaTorres         | Alena      | Torres    | Alena        | alena@mireauxms.com      | 9/23/2013 11:54:45 AM |            |

Locate the user whose profile you wish to FILL OUT. CLICK the **Manage** button next to their name to access the **User Information** page. The following page will appear:



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| inage User Credential | s Manage Roles for this User | Manage Password          | Manage Profile        |
|-----------------------|------------------------------|--------------------------|-----------------------|
|                       |                              |                          | indicates required in |
| it User - mireau      | ıxuser (ld: 114)             |                          |                       |
| User Name:            | mireauxuser                  | Created Date:            | 2/25/2010 3:12:11 PM  |
| First Name:           | Mireaux                      | Last Login Date:         | 10/24/2013 9:03:56 AM |
| Last Name:            | User                         | Last Activity Date:      | 11/6/2013 3:48:58 PM  |
| Display Name:         | Mireaux User                 | Last Password<br>Change: | 10/22/2013 4:43:30 PM |
| Email Address:        | test2@mireauxms.com          | Last Lock-out Date:      | Never                 |
|                       | -                            | User Is Online:          | False                 |
| Ipdate Delete         |                              | Locked Out:              | False                 |
|                       |                              | Authorized:              | True                  |
|                       |                              | Update Password:         | False                 |
|                       |                              | Deleted:                 | False                 |
|                       |                              |                          | Force Daceword Change |

To edit a User Profile, CLICK Manage Profile.

| First Name:             | Mireaux                                  |  |
|-------------------------|--|--|
| Last Name:              | User                                     |  |
| Location                | Singapore                                |  |
| Business Unit           | Auditing                                 |  |
| Department:             | Operations                               |  |
| Preferred Time<br>Zone: | (UTC-12:00) International Date Line West |  |
| Job Title:              | Lead Auditor                             |  |
| Preferred               | English (United States)                  |  |
| Locale.                 | 🗇 English Name 🖲 Native Name             |  |
| Status                  | Active                                   |  |
| Telephone:              | 713-589-4680                             |  |

Completely FILL OUT all **Information**, then CLICK **Update**. Make sure you do this for all the employees whose certificates you wish to update.

#### 4.4 UPDATING EMPLOYEE CERTIFICATIONS

When an employee completes training to maintain or renew their certification, their records will need to be updated in the Employee Certification Application. You can do this from the **Certification History** page.

To access the **Certification History** page, CLICK on **Certification History** in the Left Menu of the **Employee Certification Application** page or in the Top Menu of the Operations Tab.



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The following screen will appear:

| You are here: OPERATIO | You are here: OPERATIONS > Certification > Certification History<br>UPDATE EMPLOYEE CERTIFICATIONS |  |  |  |  |
|------------------------|--|--|--|--|--|
| Employee Informa       | ntion  |  |  |  |  |
|                        |  |  |  |  |  |
| Employee:              | <select all="" employees=""></select>  |  |  |  |  |
| Certification Type:    | <select all="" certification="" types=""></select>   |  |  |  |  |
| Submit                 |  |  |  |  |  |

SELECT the **Employee** you wish to update certifications for:



Next, SELECT the **Certification Type** you wish to update. In this case, we will SELECT **ADC Card Diver** as the sample certification:

| Employee:           | <select all="" employees=""></select>  |          |
|---------------------|--|----------|
| Certification Type: | <select all="" certification="" types=""></select>   |          |
| Submit              | Select All Certification Types><br>ADC Card Diver<br>ADC Card Diver/Tender                 | <b>^</b> |
|                     | ADC Card Supervisor<br>Crane Operator  |          |
|                     | Dive Helmet Inspection<br>DMT  |          |
|                     | FA / CPR Instructor<br>  Firewatch/Incipient Fire/ Hot Works Training<br>  First Aid / CPR | ш        |



Once you SELECT the desired **Employee** and **Certification Type**, CLICK **Submit**. A form will be shown on the screen. The fields to be filled out include:

| Add Certification           |   |
|-----------------------------|---|
| Employee Name:              | Mireaux Coordinator                                   |
| Certification Type:         | ADC Card Diver  |
| Certification #:            |   |
| Certification Issued Date:* |   |
|                             | Calculate Due Date                                    |
| Certification Due Date:     |   |
| Attach Certificate:         | <b>Examinar</b> No se ha seleccionado ningún archivo. |
| Cost:                       | 350   |
| Submit                      |   |

**NOTE:** Fields marked with a red asterisk are required.

The Add Certification page contains the following fields:

- **Employee Name**: This field is pre-populated according to your previous selection.
- **Certification Type**: This field is also pre-populated according to your previous selection.
- **Certification** #: TYPE IN the **Certification Number** for the certification.
- **Certification Issued Date**: TYPE IN the **Date** the certificate was issued. Make sure the date you enter is valid. For example, you should not enter 2/29/2013, because 2013 is not a leap year.
- **Certification Due Date**: If the certification type is one-time, leave it blank. If the certification type is every X months, CLICK on the **Calculate Due Date** button above the field. The system will use the training recurrence data (entered when the certification type was set up) for the certification to determine when re-certification will be required. Make sure the date you enter is valid. For example, you should not enter 2/29/2013 because 2013 is not a leap year.
- **Attach Certificate**: ATTACH a digital copy of the certificate by CLICKING **Browse**, SELECTING your chosen file, and CLICKING **Open**.
- Cost: ENTER the Cost associated with obtaining the certification.

CLICK **Submit** to save the information and proceed. In this example, a sample certificate is uploaded for a test user. On the screen, you can see the updated information shown in the History Listing table.

| You a                                  | You are here: OPERATIONS > Certification > Certification History Listing |                     |                    |                           |                        |      |                        |
|--|--|---------------------|--------------------|---------------------------|------------------------|------|------------------------|
| EMPLOYEE CERTIFICATION HISTORY LISTING |  |                     |                    |                           |                        |      |                        |
|  |  |                     |                    |                           |                        |      |                        |
|  |  |                     |                    |                           |                        |      |                        |
|  |  |                     |                    |                           |                        |      | Records Per Page       |
|  |  |                     |                    |                           |                        |      | 25 <del>•</del>        |
|  |  | Employee Name       | Certification Name | Certification Issued Date | Certification Due Date | Cost | Attached Certification |
| 2                                      | ×  | Mireaux Coordinator | ADC Card Diver     | 02/14/2013                | 02/14/2017             | 350  | Download Certificate   |

**NOTE:** The updated information will be shown on the application after **30 minutes**, or according to the application settings.



#### 4.5 ADVANCED SEARCH

Advanced Search is the most accurate way to find a certification, because so many variables can be used to narrow your search field.

To access the **Advanced Search** page, CLICK on **Certification Advanced Search** in the Left Menu of the **Employee Certification Application** page or in the Top Menu of the Operations Tab.



FILL OUT the following **Fields** on the resulting page:

| You are here: OPERATIONS > Cert CERTIFICATION AD | ification > Certification > Ce | ation Advance | d Searc | h                  |   |          |     |
|--|--|---------------|---------|--------------------|---|----------|-----|
| Employee Name                                    | <select all="" empl<="" th=""><th>oyees&gt;</th><th>-</th><th>Location</th><th><select all="" locati<="" th=""><th>ons&gt;</th><th>•</th></select></th></select>   | oyees>        | -       | Location           | <select all="" locati<="" th=""><th>ons&gt;</th><th>•</th></select>     | ons>     | •   |
| Department or Area                               | <select all="" depa<="" th=""><th>artments&gt;</th><th>•</th><th>Job Title</th><th>&lt; Select All Job T</th><th>itles&gt;</th><th></th></select>  | artments>     | •       | Job Title          | < Select All Job T  | itles>   |     |
| Certification Status                             | <select all="" statu<="" th=""><th>us Types&gt;</th><th>-</th><th>Employee Status</th><th><select all="" status<="" th=""><th>Types&gt;</th><th></th></select></th></select>   | us Types>     | -       | Employee Status    | <select all="" status<="" th=""><th>Types&gt;</th><th></th></select>    | Types>   |     |
| Certification Outsourced                         | © True   | © False       |         | Owned by           | Company   | C Employ | /ee |
| Certifying Company                               |  |               |         | Certification Type | <select all="" certific<="" td=""><td>ations&gt;</td><td></td></select> | ations>  |     |
| Cert Issue Date From                             |  |               |         | Cert Issue Date To |   |          |     |
| Cert Due Date From                               |  |               |         | Cert Due Date To   |   |          |     |
| Submit for Search                                |  |               |         |                    |   |          |     |

**NOTE:** Fields marked with a red asterisk are required.

The **Certification Advanced Search** page contains the following fields:

- **Employee Name:** SELECT the **Employee** whose certifications you wish to find.
- **Location:** SELECT the **Location** for which you wish to find certifications.
- Department or Area: SELECT the Department or Area for which you wish to find certifications.
- **Job Title:** SELECT the **Job Title** for which you wish to find certifications.
- **Certification Status:** SELECT whether you wish to find certifications that are **Current**, **Expired**, **Due in One Month**, or **Due in Two Months**.
- **Employee Status:** SELECT whether you wish to find certifications belonging to employees who are **Active, Inactive, LOA, or on Medical Leave**.



- **Certification Outsourced:** SELECT **True** to find certifications that are outsourced and **False** to find certifications that are done on-site.
- **Owned by:** SELECT **Company** to find certifications owned by the organization and **Employee** to find certifications owned by an employee.
- **Certifying Company:** ENTER the **Name** of the company which issued the certifications you wish to find.
- **Certification Type:** SELECT the **Certification Type** for which you wish to find certifications.
- **Cert Issue Date From:** SELECT the **Earliest Issue date** for which you wish to find certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date To**.
- **Cert Issue Date To:** SELECT the **Earliest Issue date** for which you wish to view certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date From**.
- **Cert Due Date From:** SELECT the **Earliest Due** Date for which you wish to find certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date From**.
- **Cert Due Date To:** SELECT the **Latest Due Date** for which you wish to find certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date To**.

When you have entered the desired variables, CLICK **Submit for Search** to obtain the results.

In this sample search, the user has SELECTED **Auditing** as the Department or Area, and **Current** as the Certification Status.

| Employee Name   | <select all="" emplo<="" th=""><th>yees)</th><th>Cocation</th><th></th><th>«Select /</th><th>N Locations&gt;</th><th>-</th></select> | yees)                                     | Cocation     |  | «Select /   | N Locations>    | -           |
|---|--|---|--------------|--|---|-----------------|-------------|
| Department or Area  | Audting  |   | Job Title    |  | « Select  | Al Job Titles>  |             |
| Certification Status  | Current  | ×   | Employe      | e Status                                 | <select a<="" th=""><th>al Status Type</th><th>42 💌</th></select> | al Status Type  | 42 💌        |
| Certification Outsourced  | © True © False   |   | Cowned to    | Cowned by                                | Company Employee  |                 |             |
| Certifying Company  |  |   | Certifica    | tion Type                                | <select <="" td=""><td>N Certification</td><td>•</td></select>    | N Certification | •           |
| Cert Issue Date From  |  |   | Cert Issu    | e Date To                                |   |                 |             |
| Cart Due Date From  |  |   | -            |  |   |                 |             |
| Cert Due Date From  |  | _   | Cert Due     | Date To                                  |   |                 |             |
| Submit for Search   |  |   | Cert Due     | Date To                                  |   |                 |             |
| Submit for Search   | Search Results   | Job Tittle                                | Cert Due     | Date To                                  | artment   |                 |             |
| Submit for Search Submit for Search Sertification Advanced moloyee Name shivastova, Madnavi               | Search Results   | Job Title<br>Consultant                   | Cert Due     | Date To<br>Location, Dep<br>Houston, Aud | artment   |                 |             |
| Centropy Date Profit Submit for Search Centification Advanced Employee Name Shthrastwa, Machael Cent Type | Search Results   | Job Title<br>Consultant<br>Cert<br>Number | Cert Company | Location, Dep<br>Houston, Auc            | artment<br>tting<br>Cert Due<br>Date                              | Cert<br>Status  | Certificate |

This search therefore returns all current, expiring soon, and expired certifications from the Auditing department.

## 4.6 CERTIFICATION KEY PERFORMANCE INDICATORS (KPIS)

Key Performance Indicators (KPIs) display real-time employee certification information in a graphical format. To access the **Certification KPIs** page, CLICK **Certification KPIs** in the Left Menu of the **Employee Certification Application** page or in the Top Menu of the Operations Tab.



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The following page will appear:

| You are here: OPERATIONS > Certi | fication > Certification KPIs |                      |                    |
|----------------------------------|-------------------------------|----------------------|--------------------|
| EMPLOYEE CERTIFI                 | CATION KEY PERFORMA           | NCE INDICATORS       |                    |
| Location                         | Department                    | Certification Status | Certification Type |
| All 🖵                            | All                           | All                  | All                |
| Cert Issue Date From             | Cert Issue Date To            | Cert Due Date From   | Cert Due Date To   |
| 31                               | 31                            | 31                   | 31                 |
| Run Report and Chart             |                               |                      |                    |

If you wish to view all KPI data for the whole set, CLICK **Run Report and Chart.** If, however, you wish to view a subset of KPI data, you can narrow the range of information used in creating the KPI graphs by using the available filters, which are as follows:

- **Location:** SELECT the **Location**.
- **Department:** SELECT the **Department**.
- **Certification Status:** SELECT whether you wish to find certifications that are **Current**, **Expired**, **Due in One Month**, or **Due in Two Months**.
- **Certification Type:** SELECT the **Certification Type**.
- **Cert Issue Date From:** SELECT the **Earliest Issue Date** for which you wish to find certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date To**.
- **Cert Issue Date To:** SELECT the **Earliest Issue Date** for which you wish to view certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date From**.
- **Cert Due Date From:** SELECT the **Earliest Due Date** for which you wish to find certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date To**.
- **Cert Due Date To:** SELECT the **Latest Due Date** for which you wish to find certifications in the MM/DD/YYYY format. If you enter this date, you must fill in **Issue Date From**.

Once you have narrowed the range of information, CLICK **Run Report and Chart.** At the top of the page, you will see a report containing information about the certifications matching your filter criteria.



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| 1 2       | 3 4        |                |                 |               |                                  |                                   |          |      |
|-----------|------------|----------------|-----------------|---------------|----------------------------------|-----------------------------------|----------|------|
| Location  | Department | Employee Name  | Cert Issue Date | Cert Due Date | Certification Type               | Certification Company             | Owned By | Cost |
| Houston   | Training   | mireauxadmin   | 12/19/2011      | 12/19/2015    | Crane Operator                   |                                   | Employee |      |
| Houston   | Consulting | mireauxpartner | 08/28/2012      | 08/28/2013    | QMS Auditor                      | RABQSA                            | Company  | 150  |
| Singapore | Auditing   | mireauxuser    | 9/1/2011        | 09/1/2016     | NDT Magnetic Particle Inspection |                                   | Company  | 3000 |
| Singapore | Auditing   | mireauxuser    | 3/20/2012       | 03/20/2014    | ADC Card Diver/Tender            | Association of Diving Contractors | Employee |      |
| Houston   | Training   | mireauxadmin   | 08/07/2013      | 08/07/2014    | FA / CPR Instructor              |                                   |          | 425  |

If you wish to further analyze the data, download this report as an Excel spreadsheet by CLICKING Excel.

| Run Report and Chart |               |
|----------------------|---------------|
| 1 2 3 4 5            | 6 7 8         |
| CIP Number           | CIP Type      |
| 25CA3D17D4           | QMS           |
| 3322CA75B6           | QMS           |
| 98538FFF40           | QMS           |
| E82C11F8BE           | Safety        |
| EFA917AFC3           | QMS           |
| 8080A6ABC6           | Environmental |
| CIP1088              | Quality       |
| CIP1103              | Quality       |
| 8764DF9356           | Safety        |
| CIP1111              | Environmental |

Below the report are several graphs which display real-time information about your company's KPIs, depending on your Web QMS configuration. If data is not available, then the chart may not appear (i.e., if Cost was not entered, the Cost chart will have no details).

• **Total Employee Certifications per Location:** Shows how many employee certifications there are at each location.





• **Total Employee Certifications per Department:** Shows how many employee certifications there are at each department.



• **Total Employee Certifications per Certification Type:** Shows how many individuals are certified in each certification type.



• **Total Employee Certifications per Employee:** Shows how many certifications each employee maintains.





• **Total Employee Certifications per Job Title:** Shows how many certifications are associated with each job title.



• **Total Employee Certifications per Certifying Body:** Shows how many certifications are provided by each company.



• **Total Cost per Location:** Shows the total cost of certifications per location, if cost was entered.





• Total Cost per Job Title: Shows the total cost of certifications per job title, if cost was entered.



**NOTE:** If a chart does not display it may be because no data is available for the filters used.

#### 4.7 SET UP EMAIL REMINDER (ADMIN ONLY)

In order to update the Employee Certification Application's automated email reminders, a user must have the Administrator role. The **Organization Variables** page can be found under the **Admin** Tab of the Top Menu of Web QMS.

| Admin                 | s                      | Search             | Site Settings<br>Page Management                            | Basic Features       |                              |                                      |   |                                      |                   |
|-----------------------|------------------------|--------------------|---|----------------------|------------------------------|--------------------------------------|---|--------------------------------------|-------------------|
| Site Settings         | Page Management        | 🍇 Security Roles   | Security Roles<br>Liner Accounts<br>Cognitization Variables | Site Settings        | Page Matagement              | Security Roles                       | User Accounts                                       | The Log                              | Balk Ernal        |
| 💩 User Accounts       | Crganization Variables | 🌆 Site Log         | She Log<br>Buik Ernel                                       | File Manager         | Recycle De                   | Event Varian                         | China .   | Languages                            | Side Workd        |
| Bulk Email            | 🧧 File Manager         | 竇 Recycle Bin      | File Makaper<br>Racycla Dat<br>Dant Veser                   | *                    | 14                           | 0                                    |   |                                      | 5                 |
| Event Viewer          | 😪 Skins                | 🔬 Languages        | Ekina   | Educations           | Web QMG<br>Registration      | Search Engine<br>Stremup             | Taxonerny   | Solutions Explorer                   | Lits              |
| 💥 Site Wizard         | Extensions             |                    | Tite Witzerd<br>Extensions                                  | Crganization Vanable | Calibration E-mail<br>Advise | Calibration User<br>Location Setting | Cart Admin E dt<br>Recenter and<br>Escalation Email | Maintenance User<br>Location Setting | PM Activity Tasks |
| Search Engine Sitemap | Taxonomy               | Solutions Explorer | Web QMS Registration<br>Search Engine Stemage               | Manterance Ernal     | Pavertie                     | Word Order Email                     |   |                                      |                   |
| Lists                 |                        |                    | Solutions Explores  | Adree                | Mantonance Types             | Adren                                |   |                                      |                   |

In the Left Menu of the **Organization Variables** page, locate the **Employee Certs Administration** drop down menu. This menu has only one section: **Setup E-Mail Reminder**.





SELECT **Setup E-mail Reminder** and CLICK **Go.** The fields on the resulting page will be pre-populated. Make changes carefully to avoid breaking code areas.

| You are here: Admin > Organization Va             | ariables > Cert Admin Edit Reminder and Escalation Email   |
|---|--|
| CERT ADMIN - EDIT RE                              | MINDER AND ESCALATION EMAIL  |
| Email From:                                       | admin@webbasedqms.com  |
| Email Subject:•                                   | Certification Reminder   |
| Email Reminder Message:                           | 🗇 Ab 🕰 • 🤊 • @ • ]   |
|   | 🖉 • 🐺 • 🧕 🧶 Custom Links 🔹   |
|   | Ω • 💷 • 📲 • 🖳 🖪 🕒  |
|   | B I ∐ abe x' ×i 掌 誖 듣 ⊟ 🎋 🕅 ≧ A •  |
|   | 🏷 • Font Name • Si • 📰 🗃 🔳   |
|   | Paragraph Style 🔹 Apply CSS C • 🗭 •  |
|   | This is an automated notice from the Mireaux Web QMS site reminding you that the following certifications have expired or will expire soon. Please contact the following employees to schedule a date, time and location for recertification to ensure the employees can continue to work offshore.  |
|   | Expired Certifications:  |
|   | \$(ExpiredDetails)   |
|   | Design   |
| Individual Email Subject:                         | Setting and the set of |
| Individual Email Reminder                         |  |
| Message:  |  |
|   |  |
|   |  |
|   | () ▼ Font Name ▼ Si▼ ■ ■   |
|   | Paragraph Style • Apply CSS C • 🚿 •  |
|   | EMAIL FOR SINGLE USERS:  |
|   | ###,##################################   |
|   | This is an automated notice from the Mireaux Web QMS   |
|   | system reminding you that your <b>\$(CertType)</b> certification will<br>expire on <b>\$(CertDueDate)</b> , ###.#################################  |
|   | contact Safety Training Department to schedule a date time   |
|   | Design   |
| Cand to Clabel Cartification                      | S Preview 678  |
| Admin (admin for all locations):                  | Yes O No   |
| Select a User to Escalate Email                   | Choose One   |
| Number of Days Before<br>Certification Due Date:- | 60   |
| Save  |  |

- **Email From:** ENTER the **Email Address** from which you would like the reminder email to come.
- **Email Subject:** ENTER a brief **Subject** line for the reminder email sent to Certification Admins. The subject line should reflect the contents of the reminder.
- **Email Reminder Message:** This area is pre-populated with an automated reminder message. This is the reminder email sent to Certification Administrators. REVIEW and MODIFY as necessary in the rich text field; however, do not EDIT any areas which look like **\$(this)**.
- **Individual Email Subject:** ENTER a brief **Subject** line for the reminder email sent to individual employees to notify them of their expiring certifications. The subject line should reflect the contents of the reminder.
- **Individual Email Reminder Message:** This area is pre-populated with an automated reminder message. This is the reminder email sent to individual employees to notify them of their expiring certifications. REVIEW and MODIFY as necessary in the rich text field; however, do not EDIT any areas which look like **\$(this)**.



- **Send to Global Certification Admin (admin for all locations):** CHOOSE whether you would (**Yes**) or would not (**No**) like the Global Certification Admin roles to receive these reminder emails.
- Select a User to Escalate Email to: The same reminder email can be sent to a manager or other relevant person. SELECT that **Person**.
- Number of Days Before Certification Due Date: ENTER the Number of Days you want the Certifications Application to look ahead and send the reminder email for expired certifications. For example, if you want the reminders to look ahead for certifications expiring in two months, then ENTER **60**, for 60 days.

Once you finish filling out all applicable fields, CLICK **Save** to proceed.

The following is an example of the reminder email for a Manager:

| o: a  | admin@webbasedqms.com<br>cnash@datasprings.com; dnnsupport@datasprings.com; admin@webbasedqms.com |  |   |   |                                     |  |
|---|---|--|---|---|-------------------------------------|--|
| ubject: C                                   | ertificatio   | on Reminder  |   |   |                                     |  |
| This is an au<br>a date, time<br>Expired Co | itomate<br>and lo   | ed notice from t<br>cation for recert<br>tions:    | he Web QMS Demo<br>tification to ensure th                | o site reminding y<br>he employees can            | ou that the follo<br>continue to wo |  |
| Employee                                    | Name  | Business Unit                                      | Certification Type  | Cert Issue Date                                   | Cert Due Date                       |  |
| Mireaux U                                   | ser   | San Diego  | ADC Card Diver  | 11/15/2005  | 11/15/2009                          |  |
| Mireaux U                                   | ser   | San Diego  | DMT   | 12/12/2008  | 12/12/2010                          |  |
| Mireaux U                                   | ser   | San Diego  | Rigging   | 11/20/2006  | 11/20/2010                          |  |
|   |   |  |   |   |                                     |  |
| There are o<br>Certificatio<br>Employee     | current<br>ons due<br><mark>Name</mark>   | tly not any cert<br>within 7 days<br>Business Unit | ifications coming du<br>to a month:<br>Certification Type | ue within 7 days.<br><mark>Cert Issue Date</mark> | Cert Due Date                       |  |

The following is an example of the reminder email for an Individual User:

| To:  | miriam@mireauxms.com  |
|--|---|
| Cc:<br>Subject:                                | Certification Reminder - User   |
|  | INDIVIDUAL E-MAIL REMINDER:   |
| Mireaux<br>This is a<br>certificat<br>and loca | x User,<br>n automated notice from the <b>Constant of the Web QMS</b> system reminding you that your <b>TWIC</b><br>tion will expire on <b>09/1/2010</b> . Please contact <b>Constant of the Training Department to schedule a date, tin</b><br>tion for recertification to ensure your eligibility to continue to work offshore. |
| Certifica<br>TWIC                              | ation Type Cert Issue Date Cert Due Date 09/01/2005 09/1/2010   |



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## **5.0 REVISION LOG**

| DATE       | SECTION | DESCRIPTION OF CHANGE  | APPROVED BY  |
|------------|---------|--|--------------|
| 02/06/2010 | All     | Original Release of MMS-WQM-206 Employee Certification Admin Guide   | M. Boudreaux |
| 12/19/2011 | All     | Original Release of MMS-WQM-207 Employee Certification User Guide  | M. Boudreaux |
| 01/19/2012 | All     | MMS-WQM-206 and MMS-WQM-207 formatting, added more screenshots edited the content for all sections.                          | M. Boudreaux |
| 03/14/2012 | 4.3     | MMS-WQM-206 added notes for Date field.  | M. Boudreaux |
| 03/27/2012 | 4.3     | MMS-WQM-206 added How to Add User Profile  | M. Boudreaux |
| 07/09/2012 | All     | MMS-WQM-206 updated to include application enhancements and skin changes.  | M. Boudreaux |
| 01/31/2014 | All     | Revision and integration of MMS-WQM-206 and MMS-WQM-2207. Released as MXM-WQM-503 Employee Certification Application Manual. | M. Boudreaux |
| 06/01/2014 | All     | Revision, editing, and formatting performed throughout the Employee Certification Application Manual.                        | M. Boudreaux |



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