Site Setup Sheet for New & Existing Site Modifications

Welcome to SafeWorkday SafetyPoints® Training!

We desire to get your group off to a great training start but we do need some assistance from you to make sure we have some needed information to use to **setup your site or upload trainees to an existing group site.**

Please gather the appropriate information for indicated process. This information needs to be emailed to lnally@safeworkday.com so we can perform needed tasks.

(1a) Required New Site Setup Information [If existing site proceed to (2)]

Items Needed:

1. Administrator Contact information (Name, address, email, phone)
2. Approved (company) or Group "Logo" or Group "name".
3. Approximate Number of Trainee s for site.
4. Profile Fields for Trainee Field(s) .(**We Need Your Custom Profile Fields** ; Profile fields are a way to sort training data and trainee information. These Profile fields' data needs to be added to a trainee's profile for use.

   Legend   **USED**   **OPEN for Your Use (provide Data Field Name)**

Profile Field	Name
Status	USED
Profile Field 2	
Profile Field 3	
Profile Field 4	
ISN ID Number	USED
Profile Field 6	
Profile Field 7	
Profile Field 8	
Profile Field 9	
Profile Field 10	
Supervisor	USED
Company Name	USED

(1b) Required New Site Setup Information [If existing site proceed to (2)]

We Need Your Trainee enrollments for New Sites or add-on to existing sites.

Items Needed:

1. Required training courses for all trainees to perform.
2. Specific training courses for individual (or group of individuals) are to perform

(1) & (2) Required New Site Setup or Existing Site Modifications Information

We Need Your Trainee list for Site Upload for site setup or to add-on to existing sites.

RULES: Upload users file format
Each line contains fields **separated** by commas (or other delimiters) without quotes (") and no trailing delimiter

The first line is special, and contains fieldnames defining the format for the rest of the file.

Required fields: In any order
username, password, firstname, lastname, email

Validity checks are performed for: username can only contain alphabetical **lowercase** letters , numbers, hypen '-', underscore '_', period '.', at-sign '@' or comma ",".

email is in the form: *name@example.com* .

Optional fields: To provide values other than the default include one or more of these
institution, department, city, country, lang, auth, ajax, timezone, idnumber, icq, phone1, phone2, address, url, description, mailformat, maildisplay, htmleditor, autosubscribe, emailstop

Custom profile field names: (Optional). xxxxx is the real custom user profile field name (i.e. the unique shortname)

profile_field_xxxxx

We must create the custom fields BEFORE importing. Use the standard header. The "shortname" for your custom field is xxxxx. The first record must include "profile_field_xxxxx". **(1a-Prevous page)**

SEE Menu Excel Spreadsheet for Your Use…

Explanation of Menu Excel Sheets
Setting up your site quickly and efficiently is a partnership between the client and CDP. We need specific information from you before we can roll out your site: the Profile Fields worksheet, Trainee Course Enrollment sheet and the Trainee Data User Upload sheet.

Profile fields allow you to run reports based on different categories, such as Job Titles or Job Division. Profile Fields 1, 5, 10, 12 are reserved for specific information such as Status and ISN ID#. The remaining fields can be customized according to your training programs using Profile Fields Worksheet. Fill this out and send it back to us to ensure that your site's Profile Fields are set up correctly at the beginning.

With over 300 modules available, it is important to identify the courses that match your training program. The Trainee Course **Enrollment Sheet** assists by listing all available courses and allowing you to mark which group should take them. It has a column for All Trainees and five columns for customizable groups to the right of the list. If the course does not pertain to your training program, don't mark it. But if it does, mark which group needs to take it by marking an X in the appropriate column. Send this list back to CDP and we will set your Course Catalogs.

Finally, the **Trainee Data User Upload** sheet gathers all the information we need about your users into one document that will be uploaded to the system. We need the columns of usernames, first name, last name, email, and location completed by the client. CDP will add the profile field information that was gathered on the Profile Fields Worksheet document.