



AccuTraining

# Quick Start Guide

Empower employees by organizing  
your training plans like a pro.



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## Introduction

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We designed **AccuTraining** to give you an easy-to-use tool for tracking your training classes and employees' training progress. With **AccuTraining**, you can:

- Add training courses and enter the dates of each session.
- Optionally create training plans and add required courses. Assign plans to employees.
- Record training attendance by either:
  - Using a **sign-in computer** to run our cloud-based sign-in software: You can simply type in the employee ID number on the keyboard to sign them in. For an even quicker sign-in, use a barcode reader, a magnetic strip reader, or even an RFID reader to quickly swipe the employee's badge and record their attendance. Note: this option requires an internet connection.
  - Use an **Apple device** (iPod touch, iPad, or iPhone) to record the attendance. Our iOS app will allow you to use the Apple device camera to read a barcode on the employee's badge and record their attendance! We also offer a magnetic stripe reader that attaches to your Apple device to allow you to swipe the magnetic strip on employee badges. Note: this option does not require a live internet connection since the attendance data can be saved on the Apple device for a latter upload.
- Don't have employee badges? No problem! Simply use **AccuTraining** to create employee badges, training badges, or just a QR code that can be used to record the sign-ins. You can even email the badges to the employees from **AccuTraining** so they can print them before training!
- Optionally upload employees' photos and show them when employees sign in on the sign-in station.
- Check out what training sessions are employees signed into at any time via the **Who's In** screen.
- Get a random pick of one or more attendees. This is useful for randomly asking questions, door prizes, etc.
- Optionally have employees **sign-out** in addition to signing in. Useful to make sure employees were present until the end of the training session.
- Optionally register employees to training session.

- Get the **training reports** you need including:
  - Employee Attendance: Shows the attendance of each employee to training sessions.
  - Training Course Attendance: Shows employees who attended a training course.
  - Location's General Stats: Shows the general statistics of the selected location.
  - Registration and Attendance: Shows the registration and attendance data for a specific session.
  - Training Plan Progress: Displays the training progress for each employee assigned to a training plan.
  - Training Progress by Employee: Displays the training progress for a specific employee.
- Optionally create training completion certificates for employees and print or email them.
- Create employee groups and use them for quicker training plan assignment.
- Take advantage of a Rules Engine for triggering actions based on certain events! For example, send an email message when an employee is added, completes a training course, etc.
- Import your employees' records instead of manual entry.
- Export attendance records to other system if needed.
- Customizable user roles.
- Change text or even entire language of application!
- API integration for developers!
- And more!

In addition, **AccuTraining** is cloud-based, which means:

- All you need to use it is a web-browser. No need to buy servers or install software!
- Simple to set up and use. Get up and running in minutes.
- Access from anywhere you have web access.
- Use on PC or Mac computers.
- Quickly make any computer a sign in station. Sign in directly through the browser or iOS App.
- Quickly view employees' credit usage and visits.

## Getting Started

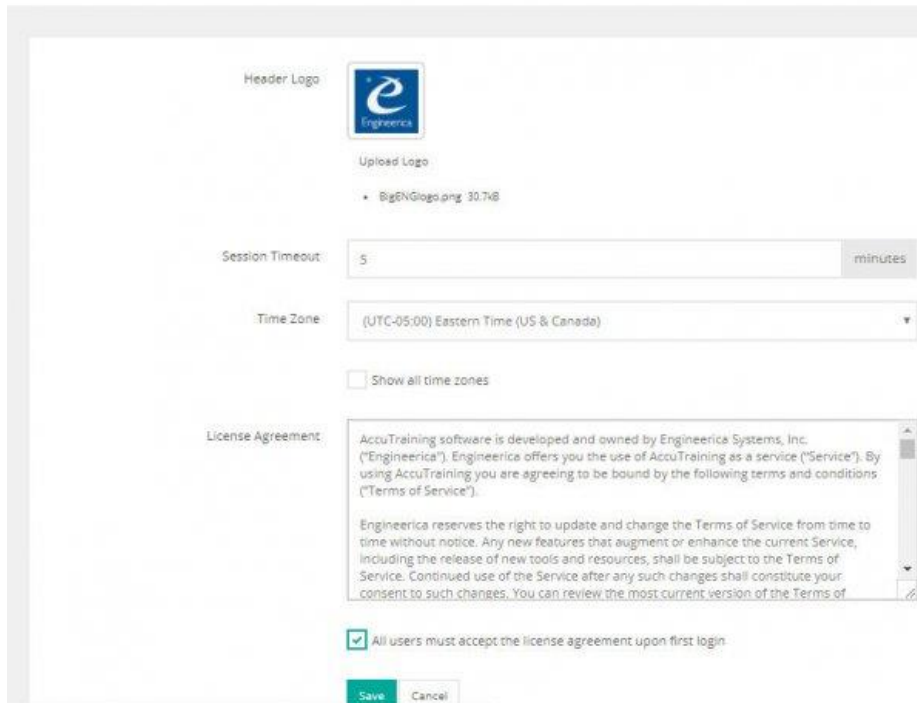
This guide is available here to help you get your AccuTraining account setup and running very quickly and efficiently.

### 1. Adjust your Account Settings

#### **Location: Advanced Options > Settings**

- Update the **General** account settings, such as the time-zone, Session Timeout, etc.

[Account Settings > General](#)



The screenshot displays the 'Account Settings - General' interface. At the top, there's a 'Header Logo' section with an 'Upload Logo' button and a file named 'BigENLogo.png' (30.7kB). Below this is the 'Session Timeout' set to '5' minutes. The 'Time Zone' is set to '(UTC-05:00) Eastern Time (US & Canada)' with a dropdown arrow. A checkbox for 'Show all time zones' is present but unchecked. The 'License Agreement' section contains a text area with the following text: 'AccuTraining software is developed and owned by Engineerica Systems, Inc. ("Engineerica"). Engineerica offers you the use of AccuTraining as a service ("Service"). By using AccuTraining you are agreeing to be bound by the following terms and conditions ("Terms of Service"). Engineerica reserves the right to update and change the Terms of Service from time to time without notice. Any new features that augment or enhance the current Service, including the release of new tools and resources, shall be subject to the Terms of Service. Continued use of the Service after any such changes shall constitute your consent to such changes. You can review the most current version of the Terms of Service.' Below the text area is a checked checkbox labeled 'All users must accept the license agreement upon first login'. At the bottom are 'Save' and 'Cancel' buttons.

- **Account Logo** - This can be the company logo or even the training series logo which will appear on the **Badges** and **Certificates** by default.
- **Time-zone** This is a very important setting and is there so [AccuTraining](#) can tell the Apple devices what **Time-zone** the training sessions will take place. By default only the 4 continental U.S. time-zones show up but you can check the box to show all time-zones if you are doing the training outside of the U.S. time-zones.
- **License Agreement (optional)** This section of [AccuTraining](#) will allow you to enter a user agreement if needed when the **Employees** login.

## 2. Enter or import the Training Courses

### Entering Training Courses Manually

**Location: General > Training Courses**

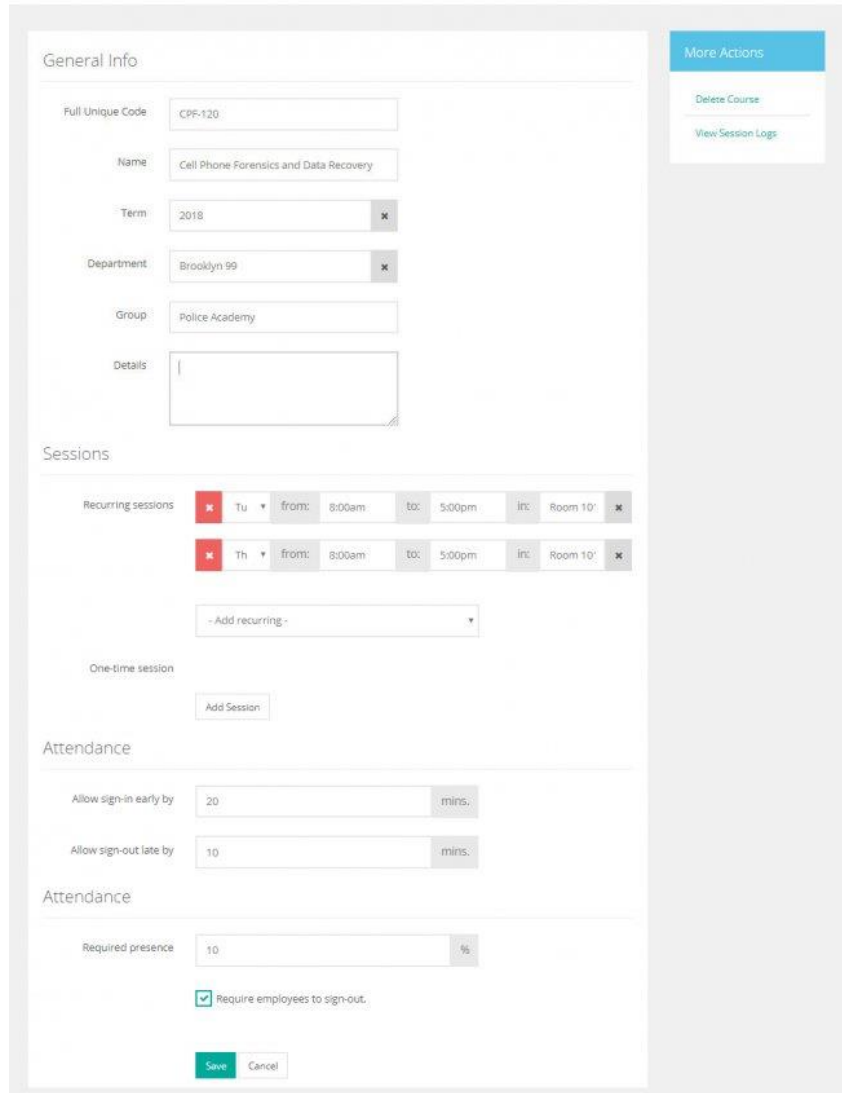
To create a new **Training Course** you simply click the **Create Course** button at the top of the page.

Complete the following information to create the **Training Course**:

#### General Info

- **Full Unique Code (Required)** - This is a unique code of the **Training Course** used to identify this specific class.
- **Name (Required)** - This is the title of the **Training Course** that you will see throughout the **AccuTraining** website when selecting the **Training Course**.
- **Term** - Used as a reporting period to be selected when running reports and if using recurring sessions it determines when the start and end dates are of these recurring sessions.
- **Department** - Used to group **Training Courses**. This assigns a **Department** (which has to be created previously) to which the **Training Course** belongs to in **AccuTraining**. It can be used to group them in the reports or plans.

Edit Course



- **Group** - Used to group **Training Courses** for a **Training Plan** or Reports. If you create a group name that you tag each course with it will use it to group them in the reports or plans.
- **Details** - this is the description of the **Training Course** which can be used for any notes about the **Training Course**.

## Sessions

- **Recurring Sessions** - Use this option if you need to specify the days of the week and time that the **Training Course** will occur. **Example:** "Mondays at 10:00 AM - 10:50 AM in RM101"
- Follow these steps to add a Recurring Session:
  1. Select a day of the week from the drop-down box.
  2. Click the first "at" field to set the start time for that day of the week.
    - Type the time manually or select the time in the drop-down box.
  3. Now click the second "at" field to set the end time for that day of the week.
  4. Finally click the "in" field to set the location the training will take place. Simply type the first 3 characters of the location name to get it to appear and click it to select that location.

If you do not have any locations setup then you can use the "Default Location" by starting to type it in the field and selecting it. To learn how to create your own **Locations** [click here](#).

- **One-time Session** - Use this option if your **Training Course** only occurs on specific dates or if you need to add days outside of the normal schedule that you will be meeting. It is completely fine to use both Recurring Sessions and One-time Sessions when setting the **Training Course** Schedule.

## Attendance Options

- **Allow Employees to sign-in early by (X) minutes.** - Simply place the number of minutes an **Employee** can be early to receive credit for the **Training Course**.
- **Allow Employees to sign-out late by (X) minutes.** - Simply place the number of minutes an **Employee** can leave after the session has completed to receive credit for the **Training Course**.
- **Required Presence (Required)** - Simply place the percentage of the **Training Course** that the **Employee** must attend in order to receive credit for the **Training Course**.

All these **Training Course** Options can be set in the **Advanced Options > Settings > Attendance** section from the Home screen of the **AccuTraining** website to set these settings for all of the **Training Courses**.

## Importing Training Courses



**Location: Advanced Options > Import****Valid headers:**

- **Code**
- **Name**
- **Term**
- **Details** *(optional)*
- **Group** *(optional)*
- **Department** *(optional)*
- **Schedule** *(optional)*

**Explanation:**

The **Name** is used to uniquely identify the training course; it must be unique across all the courses in the system.

The **Term** column refers to the term in your account, it's mandatory and it must exist before you import the training Course file. The terms are not automatically created to reduce to possibility of errors.

The **Group** is optional and it's useful to tie training Courses together.

The **Department** is optional.

The **Schedule** field needs to have the following format: <days\_of\_week **or** meeting\_date> <start>-<end> <location> Where:

- <days\_of\_week> is the list of days of the week when the training Course is given, without spaces. For example: MWF means that the training Course is given every Monday, Wednesday and Friday. The days must be specified using the following letters: M=Monday, T=Tuesday, W=Wednesday, R=Thursday, F=Friday, S=Saturday, U=Sunday.
- <meeting\_date> is a date in YYYYMMDD format that specifies a one-time training Course. For example: 20131007 specifies that the training Course is on October 7th, 2013.
- <start> is the start time of the training Course, in military time. For example 900 or 0900 refers to 9am, 1730 refers to 5:30pm.
- <end> is the end time of the training Course, in military time. Please note that it has to be separated from the start time using a hyphen.
- <location> is the name of the location where it's given.
- Full example (Mondays and Thursdays, from 9am to 10:30am in the location A-101):  
MR 900-1030 A-101
- Full example (July 29th, 2013 from 3pm to 5:45pm in the location A-101):  
20130729 1500-1745 A-101
- You can specify multiple times or locations separating them by a slash (/), for example:  
MWF 900-1030 A-101 / TR 1400-1530 A-201 / 20130815 1100-1230 A-203



### Example:

Code	Name	Details	Department	Term	Schedule	Group
ACCT-110-01	Financial Accounting I	Course details	Economics	Spring 2015	MW 900-1040 A-101	ACCT-110
BIOL-111-A	Biology I	Course details	Biology	Spring 2015	TF 1500-1620 A-102	BIOL-111
TCDW-120-2	Technical Drawing I	Course details	Industrial Design	Spring 2015	WS 900-1040 A-201	TCDW-120
TCMO-101-B	3D Modeling	Course details	Industrial Design	Spring 2015	R 900-1040 A-202	TCMO-101
HISE-121-C	European History	Course details	History	Spring 2015	TR 1300-1400 A-101	HISE-121

[Download the example file \(.csv\)](#)

### 3. Enter or import the Employees

#### Creating Employees Manually

**Location:** *Users > Employees and Users*

To create a user click the **Create New** button in the top left-side of your screen and follow these instructions:

Complete the following info:

#### User Info

- **First Name (Required)** - The user's first name goes here.
- **Last Name (Required)** - The user's last name goes here.
- **Email (Required)** - The user's email address goes here.
- **Card Number** - The user's card number goes here.
- **Password (Required for Admin/Operator Role)** - The user's password.
- **Repeat** - If entering a password repeat it in this field.

#### Security

- **Role** - Select a from the following options:
  1. **Administrator** - This is a person that will have full access to [AccuTraining](#) to manage and maintain the software.
  2. **Operator** - This is a person that will have limited access to [AccuTraining](#) to manage and maintain the software and will be primarily used to scan people into the **Training Courses** using the Apple devices.
  3. **Employee** - This is a person that will have no access to [AccuTraining](#) to manage and maintain the software but will be required to interact with the software by following their assigned **Training Plans** and attending their required **Training Courses**.

#### Photo

- Optionally you can upload a photo of the user on the far right-side of the screen.

Be sure to save the user by clicking the **Save** button at the bottom of the screen.

#### Importing Employees

**Location:** *Advanced Options > Import*

This is the import process for all user types (**Administrators, Operators, and Employees**).

#### Valid headers:

- **FirstName**
- **MiddleInitial (optional)**
- **LastName**
- **Email**
- **CardNumber**
- **Active (optional)**

### Explanation:

The **Email** is used to uniquely identify the user; it must be unique across all the users in the system. It also allows users to login, to reset their password, to receive messages and notifications and a lot more things. The email has to be unique across all the users too.

The **FirstName** and **LastName** are required. It's usually displayed in the format First Last. You can also optionally specify the **MiddleInitial**

The **CardNumber** is required to track attendance by reading physical cards using a card reader, scanning the barcodes using the mobile app for iPod touch/iPhone/iPad, or using an RFID reader connected to a PC Sign-in Station.

The **Active** field is optional. Specifies whether the user is active or not. 'Yes' or 'No' values are accepted. Defaults value if omitted is set to 'Yes'.

### Example:

FirstName	MiddleInitial	LastName	Email	CardNumber	Active
Winnie	T	Pooh	wpooh@accuclass.com	1089	Yes
Roger		Rabbit	roger.rabbit@accuclass.com	1035	No
Donald		Duck	duck@accuclass.com	6584	Yes
Fred		Flintstone	fred@accuclass.com	1078	Yes
Homer	J	Simpson	homerjs@accuclass.com	1812	Yes

[Download the example file \(.CSV\)](#)

## 4. Design and print your Badges

**Location:** *Workshops > Badges*

### Create Badge Template

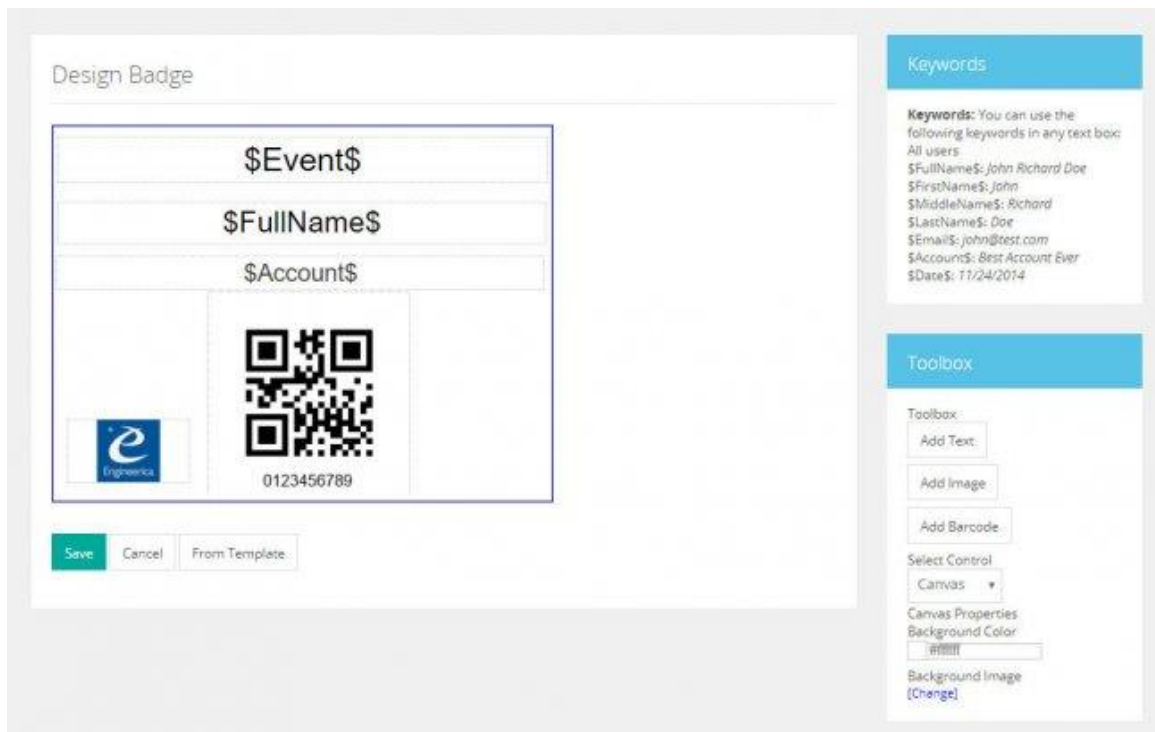
**Location:** *Workshops > Badges > Templates*

To get started simply click the **Create Badge Template** button at the top of the **Badge Templates** screen. Then complete the following steps:

1. Give the **Badge Template** a **Name** that will show up when seeing them in the **Badge Template** list.
2. Give the **Badge Template** a brief **Description** of the group of Employees this badge is designed for so you will know when seeing them in the **Badge Template** screen.
3. Now either **Save** this information only by clicking the **Save** button OR **Save and Design** this template by clicking the **Save and Design** button.

### Design

This is where you can fully customize your Users badges or just choose from several preset templates.



On this screen you can design the badges for your Users. Using the following sections:

### Toolbox

- **Add Text:** Create a box where you can enter text.
- **Add Image:** To add images to canvas the certificate.
- **Add Barcode:** This allows you to add either QR or 39 barcodes to your badges.
- **Select Control** This is used to select a part of the badge you want to edit. A dropdown list shows all the elements that make up your badge.
- **Canvas Properties**
  - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
  - **Background Image**
    - **View Image:** It will open a new window showing the image of the badge created.
    - **Change:** You can upload an image that resides on your computer.
    - **None:** Removes any background image upload.

## Keywords

You can use the following keywords in any text box:

### All Users Info:

- **\$FullName\$** Displays the full name of the User.
- **\$FirstName\$** Displays the first name of the User.
- **\$MiddleName\$** Displays the middle name of the User.
- **\$LastName\$** Displays the last name of the User.
- **\$Email\$** Displays the email of the User.
- **\$Account\$** Displays the name of the Account.
- **\$Date\$** Displays the date of the Training.

### Users with attendance

- **\$Events\$:** This displays the **Training Courses** the Employee is registered to.

## Print

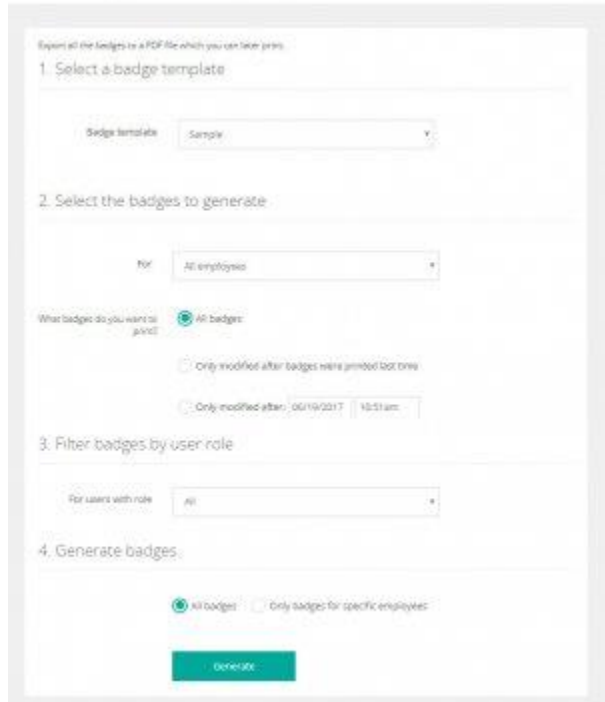
### **Location: Workshops > Badges > Print**

This section allows you to print your **Badges** you have designed in the [AccuTraining](#) software. You have many options as far as what **User Role**, which **Badge Template**, and even for only certain individuals or all of the **Users** that you want to print the **Badges**.

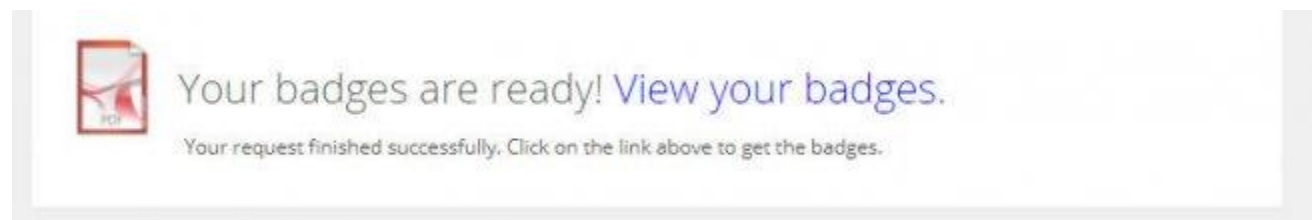
As an **Administrator**, you may want to directly download the **Badges** to print out and then hand out to the **Employees**.

1. First select a **Badge Template**.
2. Select whether to print the **Badges** for all or those only with attendance.
3. Now set what **Badges** you want to print.
  - **All badges**
  - **Only modified after badges were printed last time**
  - **Only modified after: (MM/DD/YYYY H:MM AM/PM)**
4. Now filter based on the **User Role**. This can either be a default **User Role** (Admin, Operator, or Employee).
5. Now select whether to print only individual **Badges** or all **Badges** and then click the **Generate** button. Wait until [AccuTraining](#) generates your Badges and the bottom section of the screen shows the message **Your badges are ready, click on View badges to download.**

#### Print Badges



A confirmation screen will show at the bottom of the screen and click the **View your badges** to print them out.



The Avery part number for these badges that you are going to need is #5392 and uses template number #74541. They are 3" x 4" badge inserts (6 to a page) and can be found at Avery.com by [clicking here](#) or at retailers carrying Avery products.



## 5. Setup Sign-in Stations OR use Apple AccuTraining App

### Create a Sign-In Station

#### *Location: Visits > Sign-in Stations*

1. Once in this location click the **Create New** button to create a Sign-in Station.
2. Fill out the Sign-in Station information.
  - **Station Name:** This can be whatever you want to name the Sign-In Station. you could use the room name and the number of the Sign-in Station like Auditorium-Station01, Auditorium-Station02, Auditorium-Station03, or RM101-Station01, RM101-Station02, etc.
  - **Instructions:** This can be more detailed instructions but remember to keep it simple and short because the more information you have will make the Sign-In box appear lower on the screen.
    - **Mode:** - This gives you 2 available options Manual and Kiosk mode explained below:
      1. **Manual** - This allows the **Employees** to set whether they are signing in or out for their swipes.
      2. **Kiosk** - This allows the [AccuTraining](#) software to determine whether the swipe is a in or out.
  - **Admin Passcode (optional):** Enter an Admin Passcode to manage this Sign-in Station. If you do not want to add an Admin Passcode then you do not have to.
  - **Location (optional):** Set the **Location** where the Sign-in Station will be used.
3. Click the **Save & Install Here** or the **Save without Installing** button.
  - If you want to make this PC a Sign-in Station then click Save & Install Here otherwise if this is not the PC you want to make a Sign-in Station click Save without Installing.



### General Options

Station Name

Room B-101 Sign-in Station

Title

Swipe your card or type your ID

Instructions

Please swipe your card or type your ID to sign-in to the current event.

Sign-in/Out Mode

Kiosk

Admin Passcode

1234

Show results for

5 seconds

☒ Show visitor IDs

☒ Show visitor names

☒ Show visitor photos

Photo size

Small (40 pixel wide)

List events based on

Location

General

Save & Install Here

Save without Installing

Cancel

More Actions

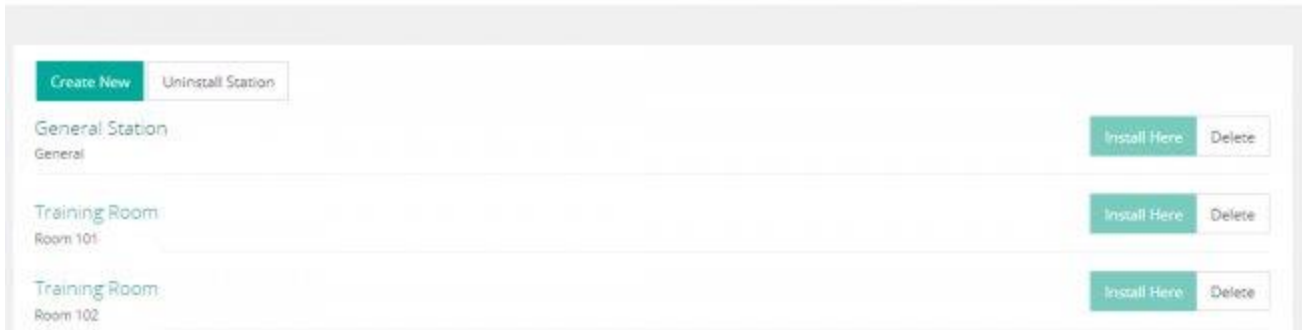
Delete Station

Click the **Save & Install Here** Button if you are installing the sign-in station on the PC you are using or if you are just setting all of them up click the **Save without Installing** button

The Sign-in Stations you've created should now appear in the list of Sign-in Stations.

## Sign-In Stations

Station installed. Sign-out to start using it.



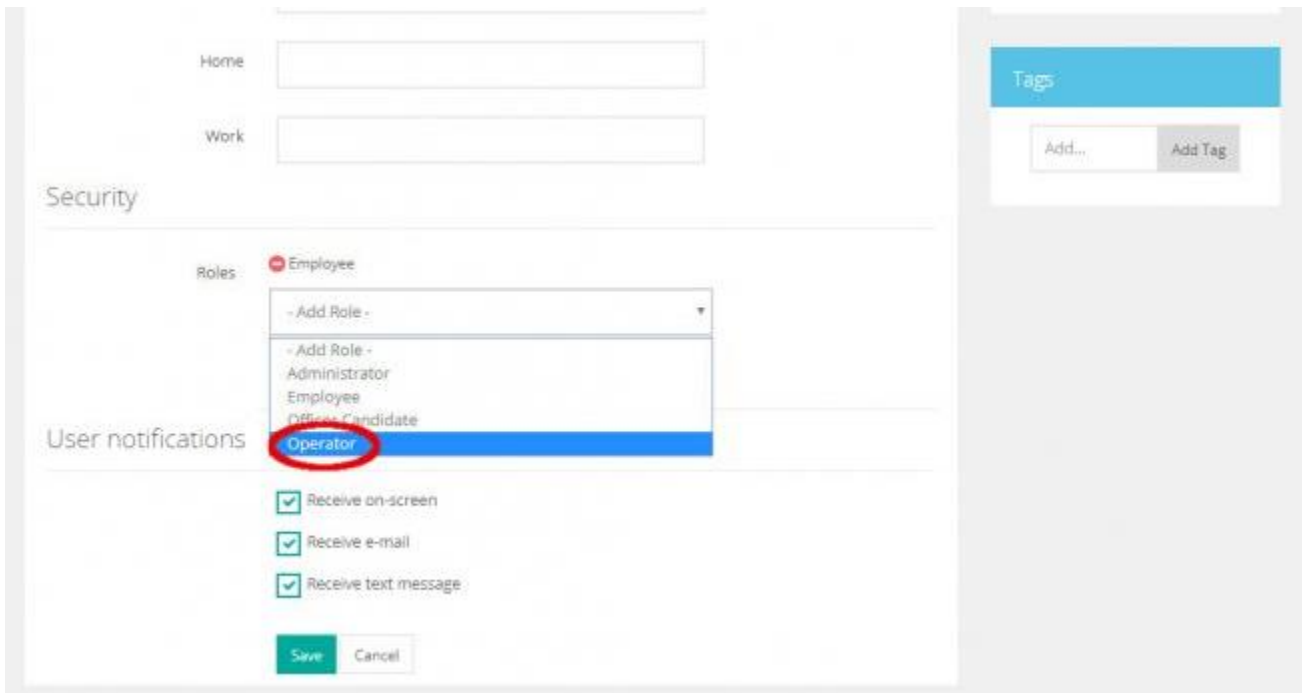
Now simply logout of AccuTraining and your browser will now to switch to **Sign-in Station** mode.

## Using the Apple AccuTraining App

### Create Operators to handle the devices

**Location:** *Users > Employees and Users*

Follow the process listed in [Step 3](#) of this guide to create an **Employee** except when selecting their **User Role** in the **Security** section set these people you intend to handle the devices **Operators**.



## Setup the Apple AccuTraining App on the devices

First, you need to download the AccuTraining App from the App Store on your Apple device. It's a free application so no need to worry about additional fees. Here is a link to the [AccuTraining app store webpage](#).

1. Tap the App Store icon.



2. In the Search field type AccuTraining and tap search. Tap the cloud icon to download/install.

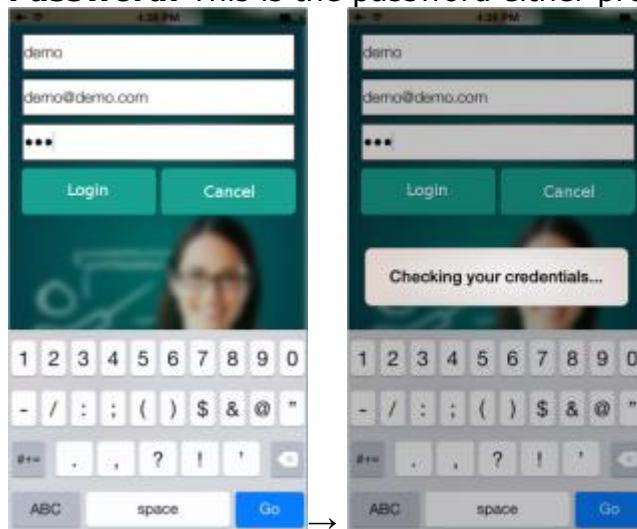


3. Now click open or from the home screen click on the AccuTraining icon and then tap the **Sign-in** Button (left-side)



4. Enter in your AccuTraining account login (provided) and then tap **Login** button (left-side)

- **Domain:** This is the domain given for the AccuTraining account.
- **E-mail:** This is your e-mail address.
- **Password:** This is the password either provided or you created.

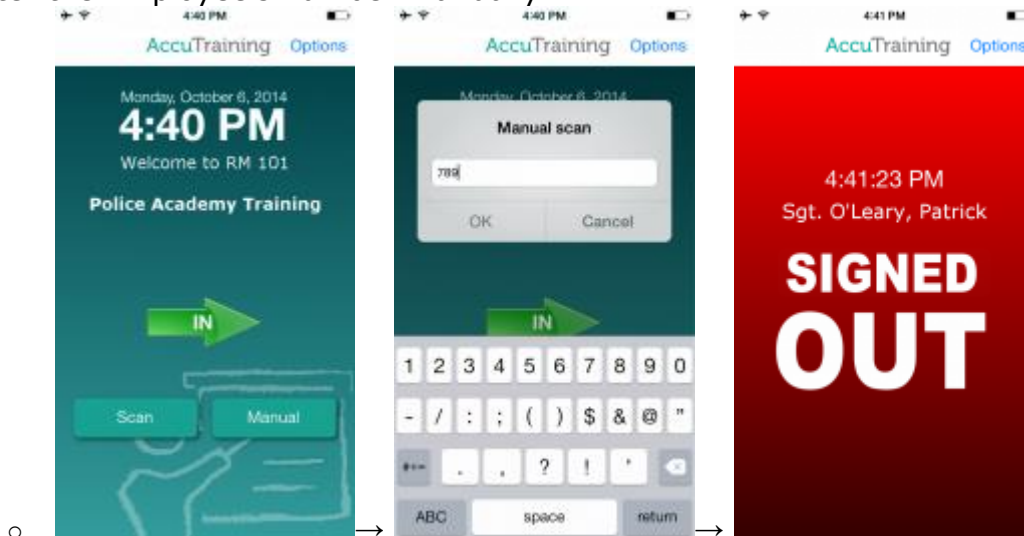


5. Done! The device will sync information and ask what location you want to start tracking.



## Track Employees Manually with App

1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Manual** button if you want to enter the Employee's number manually.

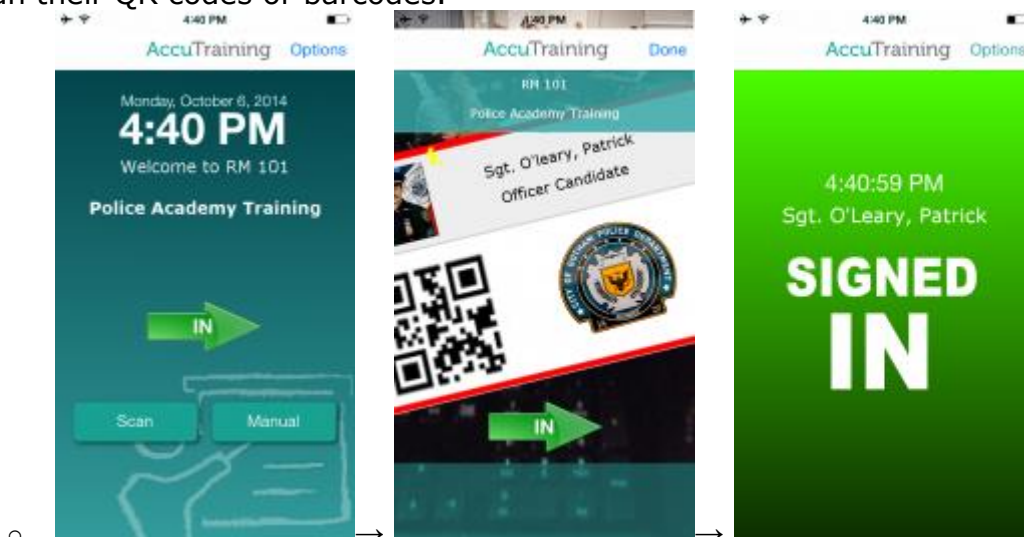


2. Once you tap the Employees ID in your Apple device and tap **OK** it will emit a short high pitched "Beep-beep!" and you will see this green "Signed Out" screen briefly.

If you hear a low pitched "Deerrrp!" sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

### Using a QR barcode with the device's Camera with App

1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Scan** button if you want to scan their QR codes or barcodes.



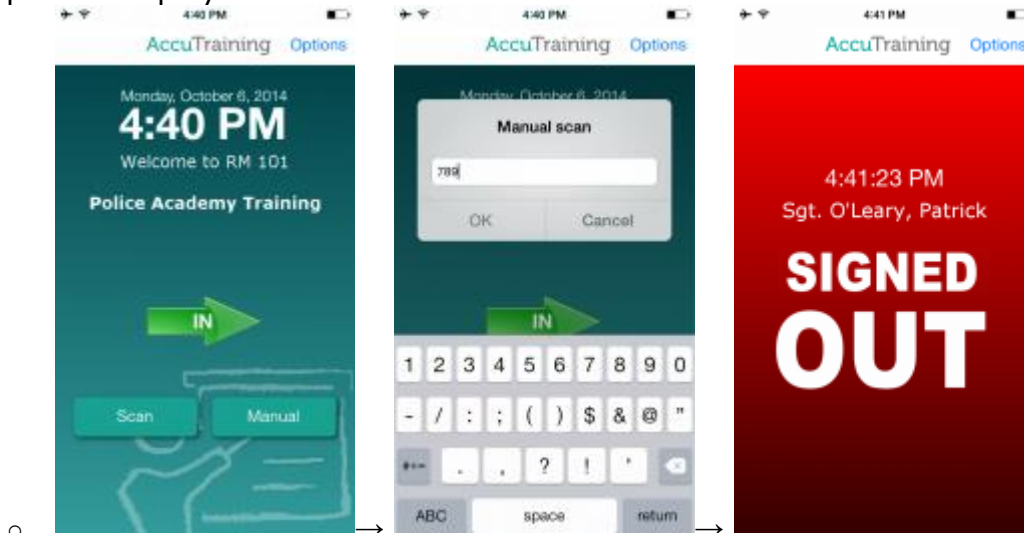
2. Once you scan the barcode or QR code your Apple device will emit a short high pitched "Beep-beep!" and you will see this green "Signed In" screen briefly.



If you hear a low pitched “Deerrrrp!” sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

## Using ID Cards with a Magnetic Strip Reader with App

1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Manual** button so you can swipe the Employee's card.



2. Once you swipe the Employees ID in your Apple device it will emit a short high pitched “Beep-beep!” and you will see this green “Signed Out” screen briefly.

If you hear a low pitched “Deerrrrp!” sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

## Whichever method you choose... Sync the Apple device.

Once you have collected all the Employee's swipes for that session you can upload/sync the data to AccuTraining out on the cloud so admins can see the attendance through the website.

1. First click the “Options” in the top right corner of the AccuTraining app.
2. Next click the “Sync” option and it should take a minute or two to complete with a confirmation.



**Done! Now you are ready to start tracking Training Courses in AccuTraining!**



## Optional Setup

These are additional options that may help improve the tracking and management of the Training Courses.

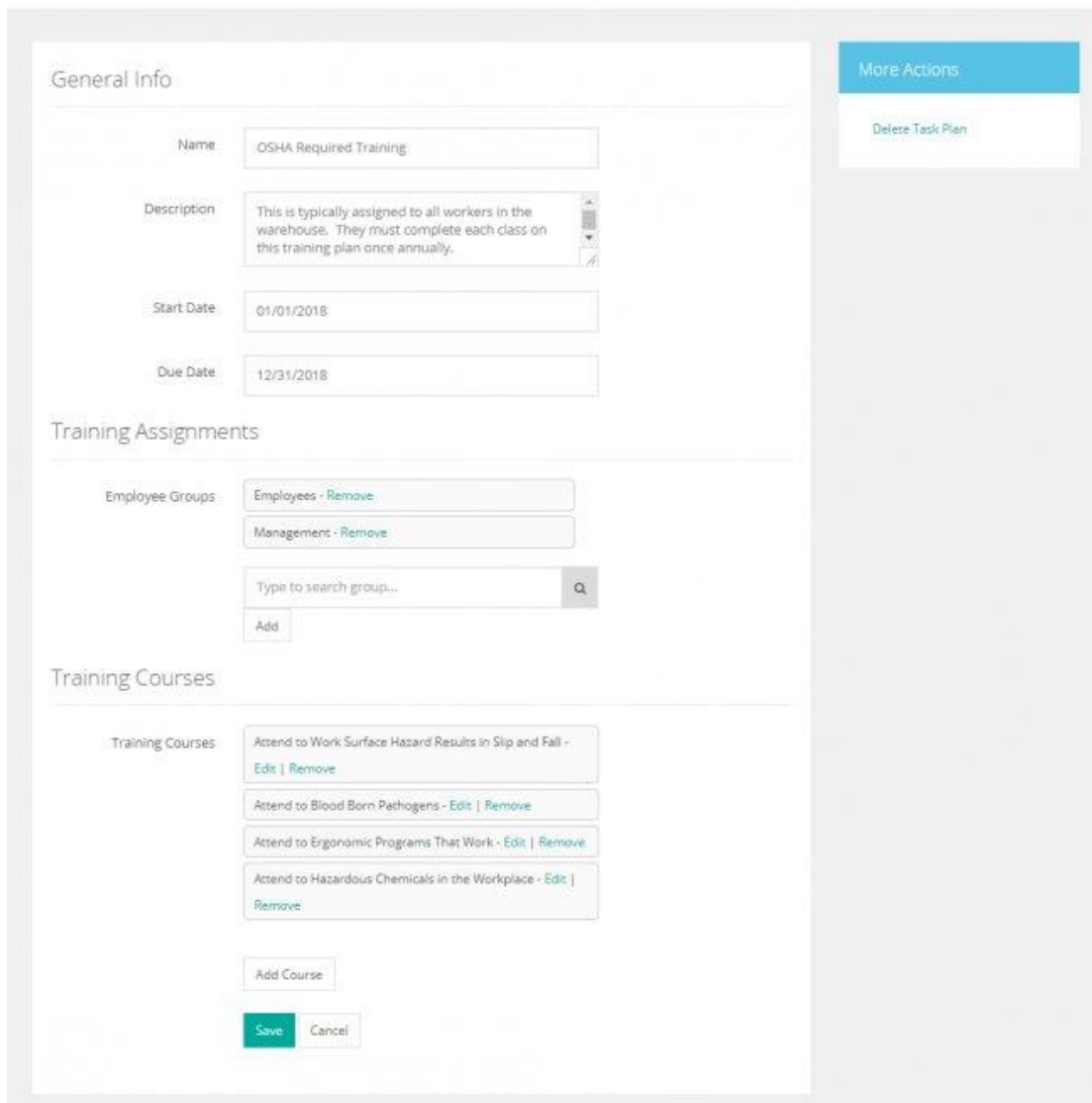
### 6. Setup Training Plans

#### Create Training Plans

**Location:** *General > Training Plans*

To create a new **Training Plan** click the **Create New** button on the top left of the **Training Plans** screen.

#### OSHA Required Training



The screenshot shows the 'OSHA Required Training' form. It is divided into three main sections: 'General Info', 'Training Assignments', and 'Training Courses'. On the right side, there is a 'More Actions' button and a 'Delete Task Plan' button.

**General Info**

- Name:** OSHA Required Training
- Description:** This is typically assigned to all workers in the warehouse. They must complete each class on this training plan once annually.
- Start Date:** 01/01/2018
- Due Date:** 12/31/2018

**Training Assignments**

- Employee Groups:**
  - Employees - Remove
  - Management - Remove
- Type to search group...** (with a search icon)
- Add** button

**Training Courses**

- Training Courses:**
  - Attend to Work Surface Hazard Results in Slip and Fall - Edit | Remove
  - Attend to Blood Born Pathogens - Edit | Remove
  - Attend to Ergonomic Programs That Work - Edit | Remove
  - Attend to Hazardous Chemicals in the Workplace - Edit | Remove
- Add Course** button
- Save** and **Cancel** buttons at the bottom.

Complete the following information to create the **Training Plan**:

## General Info

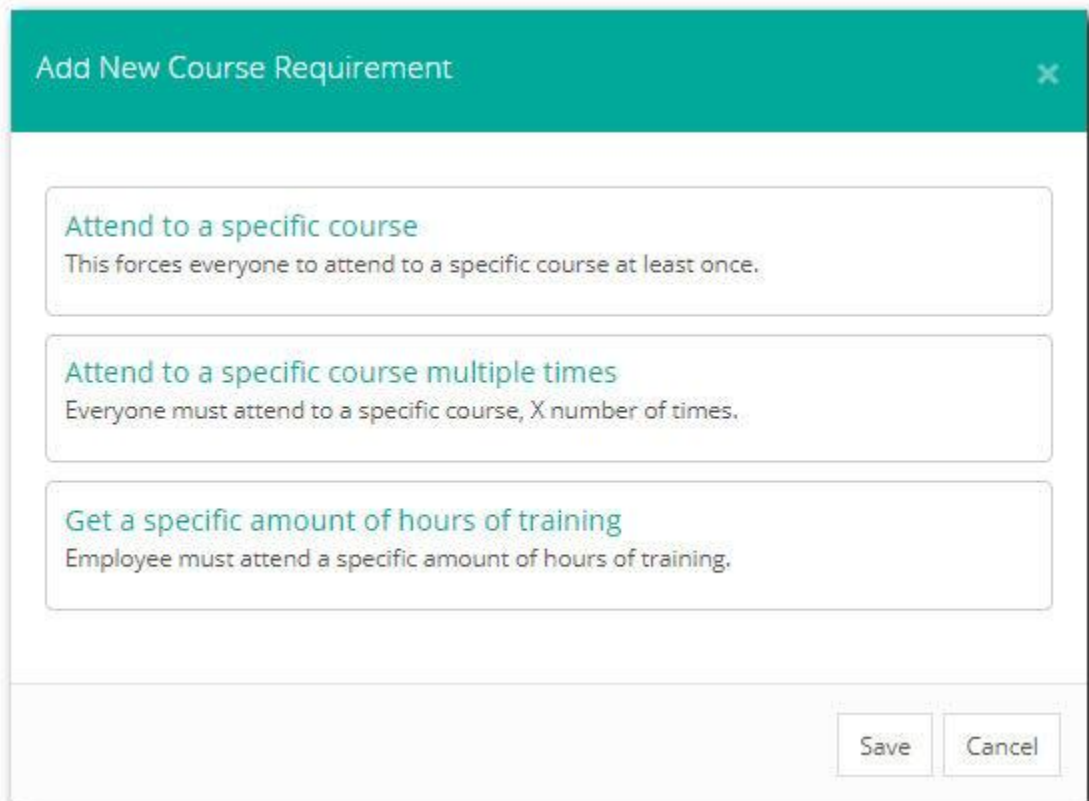
- **Name (Required)** - This is the title of the **Training Plan** that you will see throughout the **AccuTraining** website when selecting the **Training Plan**.
- **Description** - this is the description of the **Training Plan**.
- **Start Date** - this is the starting date of the **Training Plan**.
- **Due Date** - this is the due date of the **Training Plan**.

## Training Assignments

- **Employee Groups** - Use this option if you need to specify the **Employee Group** that will be assigned this **Training Plan**.

## Training Courses

- **Training Courses** - Use this option if you need to specify the **Training Courses** that will need to be completed in this **Training Plan**.
- To add a **Training Course** to the **Training Plan** follow these steps:
  1. Start by clicking the **Add Course** button so that you see the **Add New Course Requirement** popup window.



2. Select 1 of the 3 options:
  1. **Attend a specific course.** - Select the **Training Course** by typing it in the field.
  2. **Attend a specific course multiple times.**
    1. Select the **Training Course** by typing it in the **Select Course** field.



2. Set the number of required times present for that class in the **No. of Presences** field.
3. Set the minimum number of days allowed between attending sessions in the **Min Days between Sessions** field.
  - **Example:** This means if you want them to attend "First Aid - Daily Training" at least 1 session every 2 weeks (14 days) I would set the fields to "First Aid - Daily Training", "1", and "14" in the fields.
3. **Set a total amount of hours needed to complete.** - Fill-in the number of hours required.
3. Once you set the information click the **Save** button at the bottom.

## 7. Register Employees for Sessions

### Session Registration

**Location:** *General > Training Courses > Session Registration*

Use this area to manage the **Session Registration** to specific sessions of the **Training Courses**.

To manage the **Session Registration** follow these steps:

1. Simply type at least the first 3 letters of the **Training Course** in the **Select Course** field and then select the **Training Course** in the drop-down list.
2. Optionally select a **Session Date** using the Calendar that appears when you click the **Session Date** field.
3. Finally click the **View Sessions** button and **AccuTraining** will display the available **Training Course** sessions.
4. From the results displayed simply click the **View Registration** link on the right side of the **Training Course** session you wish to modify the registration.
5. Here you can add **Employees** to the **Registered Users** section by typing their names in the search field, selecting them in the drop-down menu, and then by clicking the **Add Employee** button.
6. Once done if you have more **Training Course** sessions to modify you can click the **Change Session** button to start again with another **Training Course** session.

**Users** must be added in order to manage the **Training Course** registration.

## 8. Design Certificates so ready when training is complete!

**Location:** *Workshops > Certificates*

### Create Certificate Template

**Location:** *Workshops > Certificates > Templates*

To get started simply click the **Create Certificate Template** button at the top of the **Certificate Templates** screen. Then complete the following steps:

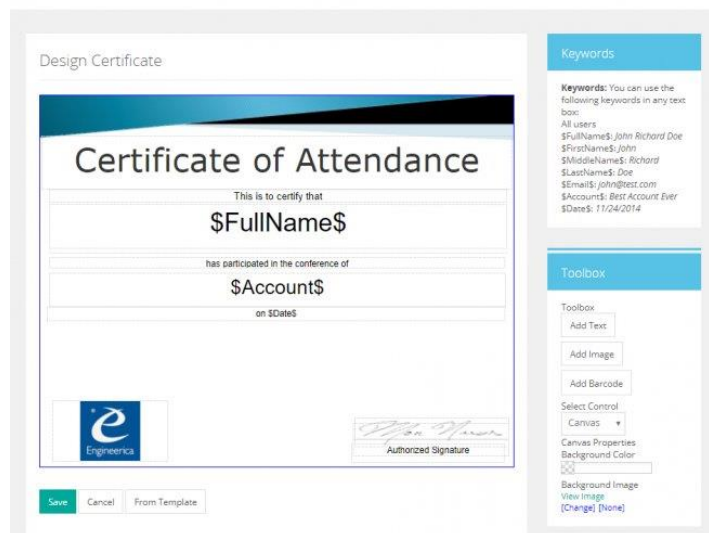
1. Give the **Certificate Template** a **Name** that will show up when seeing them in the **Certificate Template** list.
2. Give the **Certificate Template** a brief **Description** of the group of Employees or reason this Certificate is designed for so you will know when seeing them in the **Certificate Template** screen.
3. Now either **Save** this information only by clicking the **Save** button OR **Save and Design** this template by clicking the **Save and Design** button.

### Design

This is where you can fully customize your Users Certificates or just choose from several preset templates.

On this screen you can design the Certificates for your Users. Using the following sections:

Design Your Template



### Toolbox

- **Add Text:** Create a box where you can enter text.
- **Add Image:** To add images to canvas the certificate.
- **Add Barcode:** This allows you to add either QR or 39 barcodes to your Certificates.
- **Select Control** This is used to select a part of the Certificate you want to edit. A dropdown list shows all the elements that make up your Certificate.
- **Canvas Properties**
  - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
  - **Background Image**
    - **View Image:** It will open a new window showing the image of the Certificate created.

- **Change:** You can upload an image that resides on your computer.
- **None:** Removes any background image upload.

## Keywords

You can use the following keywords in any text box:

### All Users Info:

- **\$FullName\$** Displays the full name of the User.
- **\$FirstName\$**: Displays the first name of the User.
- **\$MiddleName\$**: Displays the middle name of the User.
- **\$LastName\$**: Displays the last name of the User.
- **\$Email\$**: Displays the email of the User.
- **\$Account\$** Displays the name of the Account.
- **\$Date\$** Displays the date of the Training.

### Users with attendance

- **\$Events\$**: This displays the **Training Courses** the Employee is registered to.

**That's it! Now the Certificates will be ready when you need them printed!**



*Congratulations*

[Need more help? Visit the Full Manual](#)