CMDS User Guide

Created & Reviewed by the CMDS Team

https://www.keyeracmds.com/

Contents

Logging into CMDS

Go to https://www.keyeracmds.com/ and click **“Sign In”** (top right corner)

Enter your email address and password.

Click **“Login with Email”.**

NOTE:

- You must use the email address that matches the one used in CMDS
- If this is your first time signing in, or you have a password reset, your password will be **cmds246**
- You will be required to change your password to one that is a minimum of 12 characters long.
- If you forget your password, click **“Forgot your password?”**
- If you are having difficulties logging in, contact admin_cmds@keyera.com

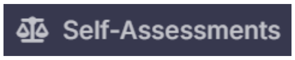
Home Page – From Top to Bottom

Sidebar

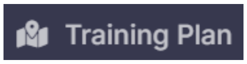
Home: click to navigate home at any time.

Profiles: *lists the profiles assigned to your account.*

Request Validation: lists the competencies for which you have assessed your skill and are ready to submit to your validator.



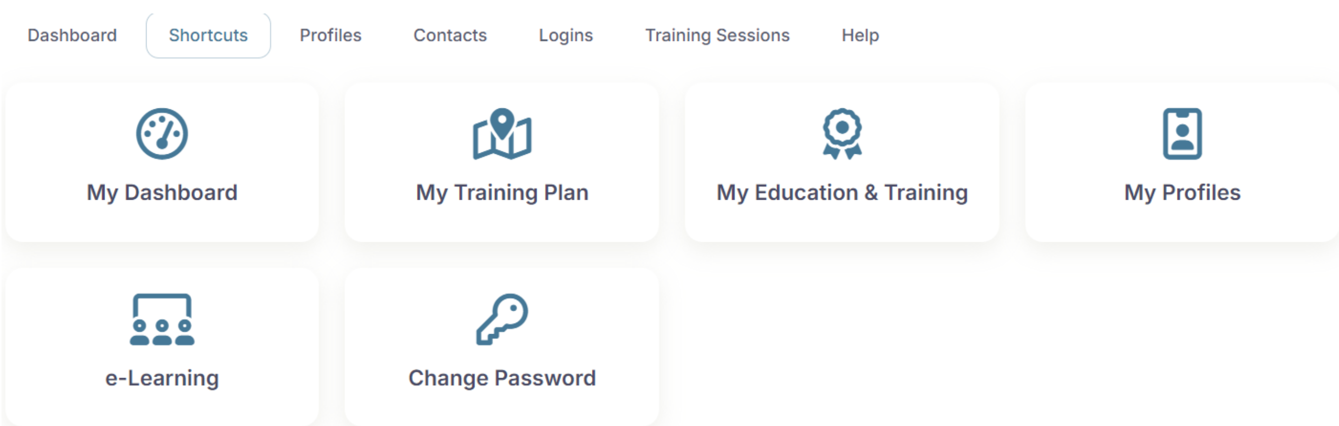
Self-Assessments: lists the critical and non-critical competencies assigned to you.



Training Plan: lists your assigned training (default displays incomplete training).

Home Page Box

- 7 tabs are available – **Dashboard, Shortcuts, Profiles, Contacts, Logins, Training Sessions, and Help.**
- **'Shortcuts'** tab is highlighted, and several shortcut tools are available for users to quickly access the most commonly used tools in CMDS (e.g., My Training Plan).



- Users can view the information under each of the 7 tabs by clicking on the tab name (e.g. Profiles)
- The **"Contacts"** tab contains a list of your manager(s), supervisor(s), and validator(s). If you are a manager, supervisor, and/or validator, you will also see a list of the individuals you manage, supervise, and/or validate.
    - If you are a Manager and have people assigned to you the you will see them listed under "Workers"
    - Managers can click on the speedometer icon next to the user's name and be directed to the user's dashboard to see where the user currently stands in their training

- If you are a Validator, you will see the people assigned to you listed under “Learners”.

Profile(s) Required for Compliance box

- Click **“Dashboard”**.
- Use the **dropdown** to toggle between “Primary profile only” and “All profiles requiring compliance”.
- When “Primary profile only” is selected, the name of your primary profile will display, and the competency totals in the compliance summary will reflect your primary profile only.
- When “All profiles requiring compliance” is selected, the competency totals in the ‘Compliance Summary’ will reflect all profiles requiring compliance.
- The ‘Compliance Summary’ breaks down each compliance category, showing your percent complete in each area. To view the assigned items, click on the colored text to the right (e.g., **1 out of 3 completed**).
- The ‘Learning Summary’ box shows any additional training that you have been assigned. To view the assigned items, click on the colored text to the right (e.g., **3 out of 4 completed**).

Compliance Summary

Time-Sensitive Safety Certificates	0.0%	0 out of 1 completed
Additional Compliance Requirements	0.0%	0 out of 1 completed
Critical Competencies	100.0%	0 out of 0 validated
Non-Critical Competencies	0.4%	1 out of 280 validated
Corporate Safe Operating Practices	4.0%	1 out of 25 signed off
Site Safe Operating Practices		
e-Learning Modules	85.7%	6 out of 7 completed

Competency Summary box

- Shows a bar graph breakdown of your Profile(s).
- Click on the status (e.g., **Expired**) to access the competencies.
- To view a bar graph on your secondary profile(s), select the profile from the dropdown.

Competency Summary

Status	Competencies
Not Completed	275
Needs Training	0
Self-Assessed	0
Submitted for Validation	4
Validated	1
Expired	0
Not Applicable	0

Secondary Profile

Status	Competencies
Not Completed	27
Needs Training	0
Self-Assessed	0
Submitted for Validation	0
Validated	2
Expired	0
Not Applicable	0

Select Secondary Profile Here 2023: Maintenance Scheduler (Safety & OE

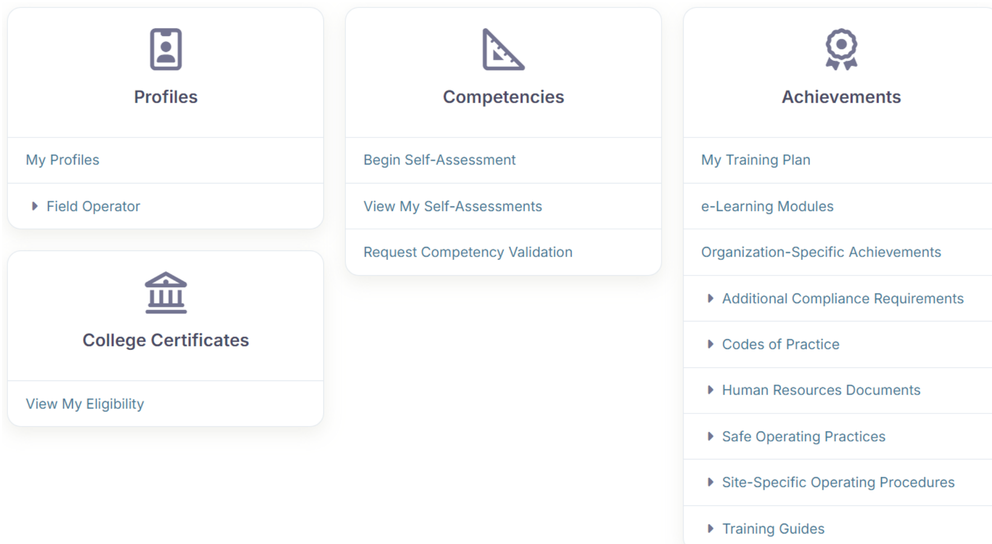
Definitions:

- **Primary Profile (Required for Compliance):** The job profile that best matches the job you are performing the majority of the time.

- **Secondary Profiles (Required for Compliance):** Job profiles that contain a mandatory skill set for supporting or additional functions required for your job.
- **Secondary Profiles (Not Required for Compliance):** Job profiles not required to safely and effectively complete your current job role (often roles you are training in).

Learning Portal

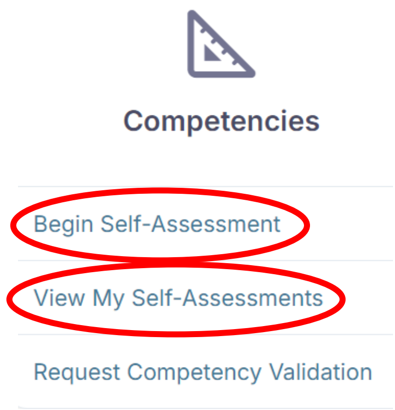
- Contains 4 sections – **Profiles, College Certificates, Competencies, and Achievements.**
- Each section consists of various tools and functions designed to assist users in performing their responsibilities efficiently and effectively.



Self-Assessment Guide

There are a variety of ways to access your competencies to perform your self-assessments.

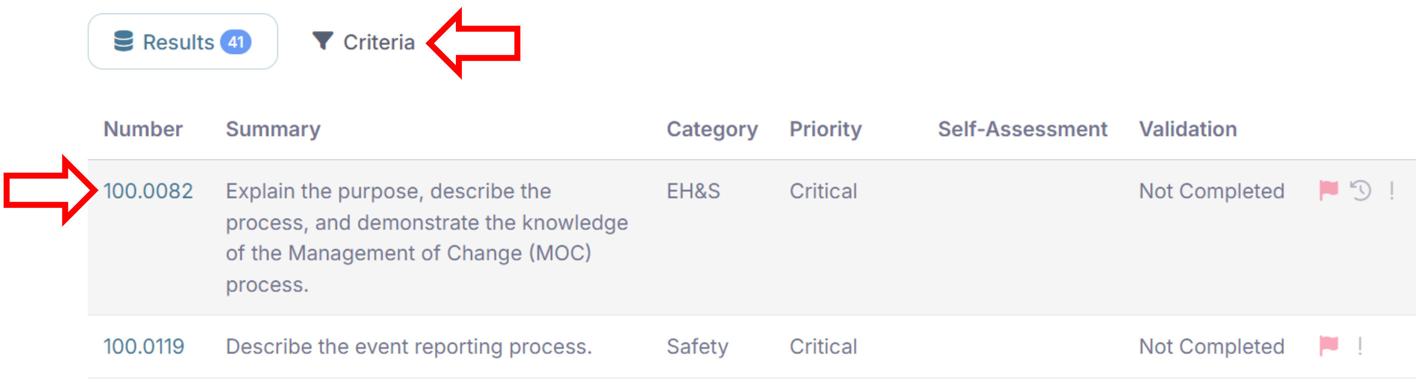
Method #1: Using your learning portal



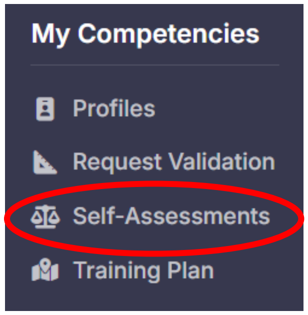
- From your home page, scroll down to your 'Learning Portal'.
- Listed under 'Competencies', click **"Begin Self-Assessment"** or **"View My Self-Assessments"**.
- **"Begin Self-Assessment"** will bring you to the next competency waiting to be self-assessed.
- Once you click **"View My Self-Assessments"** click on the competency number for which you would like to self-assess.
    - NOTE: you can use Criteria to locate a specific competency, category, or criticality.

Method #2: From your profile(s)

- From your home page, select the **"My Profiles"** under 'Shortcuts'.
- Click on the Profile name that you would like to self-assess on.
- Click on the competency number for which you would like to self-assess.
    - NOTE: you can use Criteria to locate a specific competency, category, or criticality.



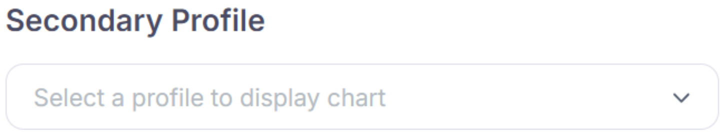
Method #3: From the side menu

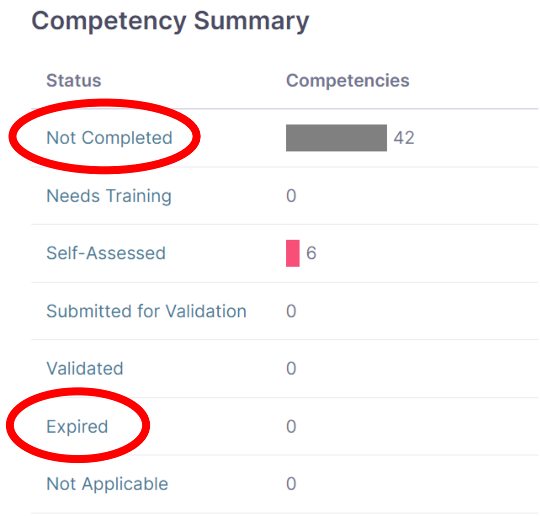


- The side menu is available from any page in CMDS, *except* when completing an e-learning module.
- Click **"Self-Assessments"** under 'My Competencies' on the side menu.
- Click on the competency number for which you would like to self-assess.
    - NOTE: you can use Criteria to locate a specific competency, category, or criticality.

Method #4: Using your competency summary bar graph

- From the 'Dashboard' tab on your homepage, scroll down to see your **"Competency Summary"**
- Click **Not Completed** in the Competency Summary bar graph
- To access your expired competencies in your primary profile, click **Expired** in your 'Competency Summary' bar graph.
- To generate a bar graph on any of your secondary profiles, use the dropdown under 'Secondary Profile'.





Completing your self-assessment:

- Using any of the above methods, once you are viewing the competency for which you would like to self-assess on, review attached 'Achievements and Downloads', if required, review the 'Knowledge and Skills', then complete your "Self-Assessment".
- Click **"NEXT"** to be taken to the next competency. This saves your response. You <u>do not</u> have to click "Submit for Validation" after every self-assessment.
- Once you have completed several self-assessments, and are ready to notify your validator, click **"Submit for Validation".**
  - This sends an email notification to your validator informing them that you are ready to be checked out on your submissions. NOTE: For competencies which have been self-assessed, but not submitted, no notifications are sent to your validator.

Locating Specific Competencies for Validation

- When using any of the above methods, you can isolate a specific competency number, search for key words, isolate critical competencies, and/or search for expired competencies
- Expand the 'Criteria' box
- Using the dropdowns and search boxes, enter the applicable information and click **"Search"**

Submitting Your Competencies for Validation

Once you have completed a number of self-assessments, and would like to notify your validator that you are ready to be validated on your self-assessments:

- From your home page, scroll down to your "Learning Portal".
- Under 'Competencies', click **"Request Competency Validation"**.
- You will see a list of all your self-assessed competencies that are ready for validation, click **"Submit for Validation"**. This will send an email to your assigned validator informing them that you are ready to be validated on the competencies listed.
  - NOTE: Your validator will only be able to validate you if they themselves are validated in that competency.

- You can verify who your assigned validator(s) are by going to your home page, clicking on the **“Contacts”** tab, and looking for your listed Validator(s). If no one is listed, contact your manager, administrator, or account manager.

Reviewing and Signing Off on Items in your Training Plan

If you have been **assigned** a document for review, an eLearning module for completion, or a safety certificate that is required, you will see this reflected on your dashboard.

Option #1:

- To view what you have been assigned for completion, click **"My Training Plan"** under the 'Shortcuts' tab.
- Display will default to show **ONLY items NOT COMPLETE**.
    - To see BOTH complete and incomplete training, click the **box** next to "*Show all of the achievements in my training plan.*"
- Click on the **name** of the achievement you are looking to complete.
- Review the attachments under "Training Achievements" / "Achievement Downloads" and click **"Sign Off"**.

Option #2:

- To view what you have been assigned, click **"My Education & Training"** under the shortcuts tab.
    - NOTE: Everything you are assigned, regardless of if it is or isn't in your training plan, can be found here. If you are working on completing required training, please use Option #1 to find your required training.
- Based on the flags, you can tell what education you have completed and what is waiting to be completed.
    - A *green flag* means that the training is completed and valid.
    - A *red flag* means that the training is pending or expired.

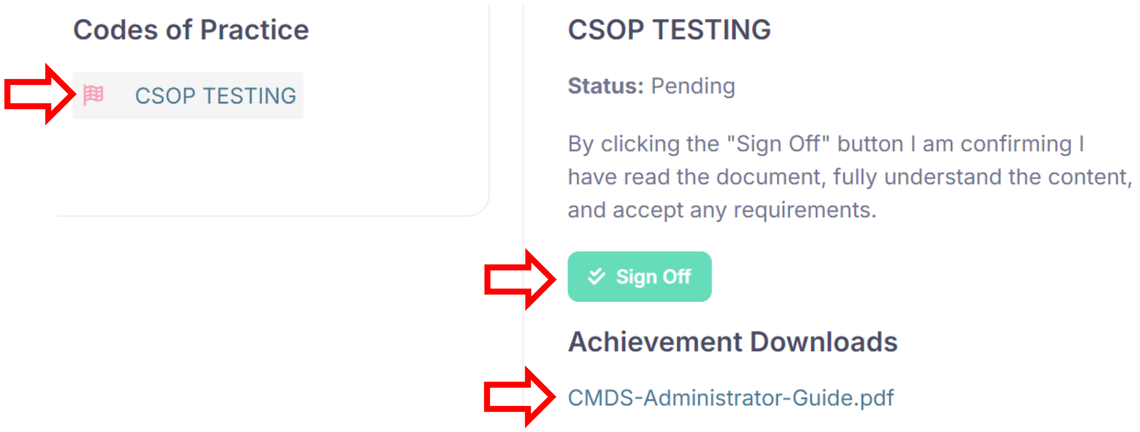
Status	Completion	Expiration	Files	Flags
Valid	Jul 5, 2022			
Expired	Jul 31, 2021	Jul 31, 2022		
Pending (30%)				

- Click on the **name** of the achievement you are looking to complete.

- Review the attachments under “Training Achievements” / ”Achievement Downloads” and click **“Sign Off”**.

For Codes of Practice, Safe Operating Practices, Additional Compliance Requirements, Site-Specific Documents, and Training Guides;

- To view what you have been assigned for completion, click **“My Training Plan”** under the ‘Shortcuts’ tab. OR click **“My Education & Training”** under the ‘Shortcuts’ tab.
- For any of the categories listed above, you are required to **READ/REVIEW** and **SIGN OFF** that you **understand** the content.
- Click on the document you would like to sign off on.
- Open the document(s), under “Training Achievements”/”Achievement Downloads”, read/review its content.
- Click **“Sign Off”**.
- This will remove the achievement from your training plan and show it as complete.



For Assigned eLearning:

- To view what you have been assigned for completion, click **“My Training Plan”** under the ‘Shortcuts’ tab. OR click **“My Education & Training”** under the ‘Shortcuts’ tab.
- Click on the eLearning module title to open/complete the module.
  - You must complete the associated quiz with a grade of *90% or higher.*

For Time-Sensitive Safety Certificates:

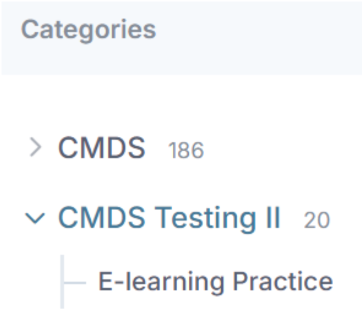
- Your organization may choose to track your required safety tickets in CMDS.
- If your required / assigned TSSC is expired or not complete it will show in your ‘Training Plan’.
- You cannot remove this achievement or mark it as complete. **You must contact your local administrator and show proof of completion. Your administrator will then update your completion status.**

Further Information

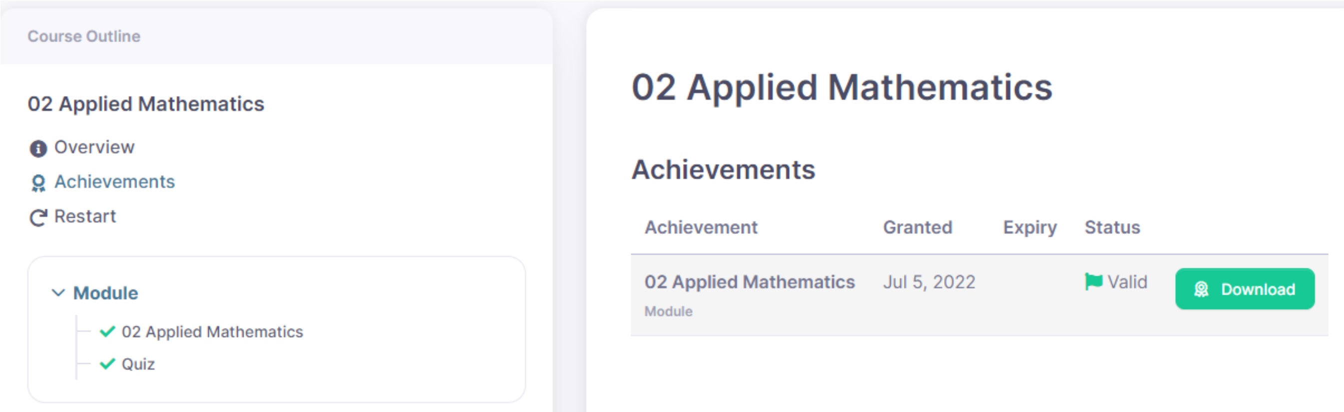
- **Clock icons** mean there is a time clock on that achievement. Once you sign off on that achievement, it will expire at a set interval from the sign off date (e.g., 1 year), at that time you will have to re-review the achievement.
- **Red flags** mean you have not yet signed off on or completed that achievement.
- **Green flags** mean you have completed reviewing the achievement and signed off.

eLearning User Guide

- Access **"e-Learning"** from the 'Shortcuts' tab on the home page OR scroll down to your 'Learning Portal' and click **"e-Learning Modules"** under "Achievements".
- You will see a list of the available modules open in a new screen or tab – modules are displayed alphabetically.
    - You can also search by category by expanding the 'Catalogue' name and clicking on the name of the category you are looking for.



- To access a module, click the title and register for the course by clicking **"Start"**.
- The module will then display.
    - NOTE: Modules can contain multiple lessons and multiple quizzes.
- Review the lesson content and take the quiz by clicking **"Start Quiz"**.
    - NOTE: Quizzes contain at least 5 questions and a grade of 90% or higher is required to pass.
- Complete the quiz, answering <u>every question</u>, and click **"Complete"**.
- You will get a confirmation message asking you to confirm your submittal. Click **"Confirm"**.
- Your quiz results are then displayed. You are given the option to attempt the quiz again by clicking **"retry this assessment"**.
    - You will **not** be given the same quiz twice.
    - Generally, you are allowed <u>3 attempts</u>, and then the system will lock you out of the quiz for 24 hours.
- Viewing the quiz counts as an attempt.
- A passing mark will generate a certificate for your records. **If you would like a copy of the certificate, you can find it on the left-hand side under the Module name at any time:**



- When viewing the quiz, to return to the module, click **"Return to Course Outline"**.
- To return to the list of available modules, click the company logo in the top left corner.

- From the list of available eLearning modules, you can search for a specific module using the **"Search catalog"** bar.
- Type in a keyword related to your search and click the **magnifying glass**.
- Once you have searched for something you **MUST** clear your search criteria to obtain the full list of available modules again. You can do this by clicking the **"X"** next to the 'Search catalog' bar.

Please Note:

- If a module contains multiple lessons, with more than one quiz, an average grade of 90%+ must be achieved to pass.
- CMDS records your most recent grade, not necessarily your highest mark.
- Modules are organized by category; the same module may appear in more than one category.
- For a record of completed eLearning, see your **"My Education & Training"** in CMDS.
- There is **NO FEE** per module and users can "register" for as many modules as they would like.
- You do not have to attempt the quiz.
- We have done our best to make all videos and images viewable to all users. If a file is not loading, please try accessing the eLearning on an alternate browser.
    - We encourage the use of these browsers with CMDS:
        - Microsoft Edge
        - Google Chrome
        - Firefox

Terms and Definitions

- **ACR –** Additional Compliance Requirements; general compliance category, allows each organization to track and assign training requirements that may not fall into one of the existing categories.
- **CMDS –** Competency Management and Development System.
- **CMDS blog –** information sharing platform where news and updates are posted https://www.keyeracmds.com/blog
- **COP –** Code of Practice; generally segregated due to the Alberta OH&S Code requirement stating that organizations must have a code of practice for all listed harmful substances (e.g., Benzene and Asbestos).
- **Critical Competency –** a competency that addresses a high-risk activity or subject. Generally, this competency is marked time sensitive and requires revalidation at a set interval (e.g., 1 year).
- **eLearning Modules –** unique to CMDS, these modules provide users with additional information and short quizzes to test their understanding. Generally, completing an eLearning module is optional unless otherwise indicated by your organization / manager / validator.
- **HRD –** Human Resource Document; a document that requires employee review and sign off (e.g., a corporate drug and alcohol policy).
- **Primary Profile –** Required for Compliance; the job profile that best matches the job you are performing the majority of the time.
- **Secondary Profiles (Not Required for Compliance) –** profiles not required to safely and effectively complete your current job role.
- **Secondary Profiles (Required for Compliance) –** profiles that contain a mandatory skill set for supporting or additional functions required for your job.
- **SOP –** Safe Operating Practice
- **SSOP –** Site-Specific Operating Procedure; generally, a document that describes the steps that must be followed to perform a task, typically the start-up, shut down, or maintenance of a piece of equipment or process.
- **TG –** Training Guides
- **TSSC –** Time Sensitive Safety Certificates; certificates that are generally time sensitive in nature (e.g., First Aid and Ground Disturbance).

Additional Information

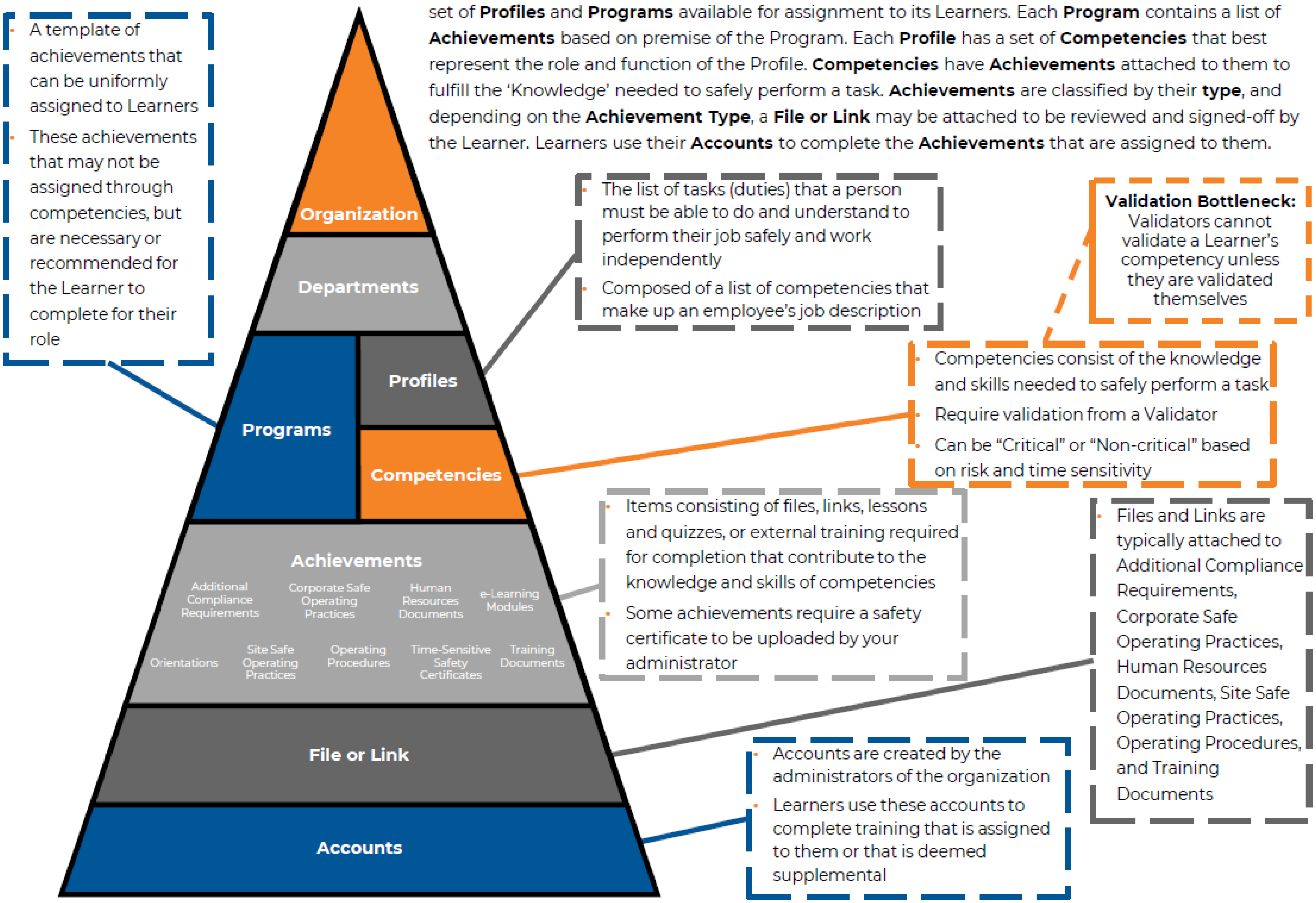
- If you require help or have a question, you can:
    - Contact your local admin
    - Contact your account manager
    - Submit a help request from the **"Help"** drop down in CMDS
    - Email admin_cmds@keyera.com

- If you are interested in registering for the Validator Training Course, go to https://www.keyeracmds.com/, click **"VALIDATOR TRAINING"** on your home page, click on the upcoming session you would like to attend. You will be contacted with the course details within 2 working days of submitting your registration.
    - Please note: you must finish your self-assessments prior to attending the Validator Course.

- Check out the CMDS Blog for up-to-date CMDS information https://www.keyeracmds.com/blog. **"SUBSCRIBE"** to stay in the loop!

CMDS Terminology & Hierarchy

In an **Organization**, Learners are assigned to **Departments** created in CMDS. Each **Department** has a set of **Profiles** and **Programs** available for assignment to its Learners. Each **Program** contains a list of **Achievements** based on premise of the Program. Each **Profile** has a set of **Competencies** that best represent the role and function of the Profile. **Competencies** have **Achievements** attached to them to fulfill the 'Knowledge' needed to safely perform a task. **Achievements** are classified by their **type**, and depending on the **Achievement Type**, a **File or Link** may be attached to be reviewed and signed-off by the Learner. Learners use their **Accounts** to complete the **Achievements** that are assigned to them.



If you have questions or need clarification, please reach out to the CMDS Help inbox (admin_cmds@keyera.com)

Last reviewed: January 2025