Introduction

The **RCRS Training Database** allows individuals authorized by their SBU School or College to record and track completed training, as required by Stony Brook’s RCRS policy, P211.

**Home Page**

When you first go to the RCRS Training Database, the system will bring you to the home page.

- If you have already logged in and submitted your certification form, click **Log In**. You can skip the information below about certification.
- If you are using the system for the first time, you must fill out a certification form before you can view or enter data. Click on the **Certification Form** link to fill out the form. You will be asked to log in.

**Logging In**

Logging in is done using Stony Brook Single Sign On (SSO) and your NetID and NetID password. For more information on your NetID, or if you are not sure what your NetID is, please see DoIT’s Service Catalog NetID entry at [http://it.stonybrook.edu/services/netid](http://it.stonybrook.edu/services/netid). For more information on Stony Brook SSO, see the Service Catalog entry at [http://it.stonybrook.edu/services/single-sign-on-sso](http://it.stonybrook.edu/services/single-sign-on-sso).

Your NetID is typically some combination of your first and last name, often (but not always) your first initial and last name.

**Certification**

Read each certification carefully before completing the form.
Once you've reviewed the certification, type your name into the certification box and press the *Submit Certification* button. After you complete training entries, you will be required to complete a second, much shorter certification.

**System Home Page**

Once you are logged in and certified, you will be brought to the system home page.

Choose one of the functions named on the gray navigation bar below the Stony Brook University logo to enter data, create training rosters, or run reports.
Training Entry Form

You may enter training data by clicking on the Training Entry Form link. Training entries are the basic unit of information captured in the RCRS system and represent the training that occurred in a given training session.

Training entry data is not saved until you submit the data, at which point it becomes live and reportable. There is no “draft” state for training entries, though you can make modifications to training entries at a later time.

The training entry form is broken down into several sections, capturing necessary information for each training session.

Your Role in RCRS Training Activity

In this section, you must select your role in the RCRS training activity. You can only select one training role.

Types of Training Activities

In this section, you must select the activities used to conduct the training. You can select as many types as are applicable. Some types require explanation, such as Experiential Student Training. You also have the option of entering a type not on the list by pressing the Add Other Training Activity Type button.

Topics Covered
In this section, you must select the topics covered by the training. You can select as many topics as are applicable. You can also add a topic not on the list by pressing the **Add Other Topic** button.

### Hours and Completion Date
In this section, you must enter the number of hours completed through the training as well as the date that the training was completed.

### Trainees
In this section, you must list the trainees who received training. There is an option to pre-populate this list from a training roster list that you can save, reuse, and share, (see below) but when clicking on the **Training Entry Form**, the list is empty by default.

To add a trainee, press the **Add Another Trainee** button. A new row will be added. Type part of the trainee’s name in the **Name** text box in *First Last* or *Last, First* format. You can optionally add the person’s middle name after the first name. Do not include any wildcard characters, such as * or %.
Once you’ve entered a trainee’s name, press the Find button next to the name. If only one person can be found with a matching name, that person’s information will be filled in automatically for verification. Otherwise, you will be prompted with a list to select the correct person.

If you entered the number of hours completed in the previous section, that number will be automatically filled for the person you just added. You have the option of changing the number of hours if the trainee did not attend the full training or completed extra training. You should add as many trainees as completed the training.

**Certification**

Before you can submit the training entry, you must positively certify that the data is accurate.

Submit

Once you have completed the form, press the Submit Training Data. If there are any errors that prevent the form from being saved, they will be highlighted in red, and a description will be listed at the top of the page. Once you’ve saved the form, you will get a timestamp alert indicating that the data was saved.

You will also receive an e-mail from the system confirming the entry.

**Making Corrections to Training Data**
If you want to make changes to an existing entry, you will have to provide the reason. This *Modification* section only appears when making changes to an existing training entry.

My Training Entries

To view a list of training entries you’ve made before, click on the *My Training Entries* link in the gray navigation bar.

The resulting list includes a row for each trainee’s attendance at each training. You can view a read-only version of each entry as well as edit the entry by clicking on the links in the leftmost column.

Reports

This system allows you to report on training hour completion as of a certain cutoff date. The report can be run for an entire campus, for specific individuals, or for training rosters.

*Completion Report*
The completion report runs for all people on campus, and can be filtered by a cutoff date. It lists each person and the number of hours of training that the person has received since that date. The default cutoff date is four years prior to the day on which you’re running the report. To open the completion report, click on the Reports link in the gray navigation bar, then on the Completion Report link.

The completion report gives you options to limit the number of records per page and to change to another page number.

Report by Individual

The RCRS system also allows you to run reports based on a list of individuals. You have the option of saving these reports for later use. To create a new report by individual, click on the Reports link, then on the New Report by Individual... link.
When you first load open a new report by individual, it will not list any data. The first step in setting up a report is to press the *Edit Trainee List* button:

This will prompt you to enter the names of the trainees for the report. You can add as many trainees as you’d like. When you’re done, press the *OK* button.

Then, press the *Run Report* button to see the training hours for the selected individuals. The report will look like this:
You can print the report; you can also save the report for future use by typing a name in the **Report Name** text box, then pressing the **Save Report** button.

The report will then show up under the **Reports** link:

Training Rosters

Training rosters in the RCRS system allow you to create lists of individuals to reuse for recording training and for running reports. You can also share rosters with your
colleagues. For example, you might have a roster with all of the graduate students in your department.

**Creating a Roster**

To create a new roster, start by clicking on the *My Rosters* link in the gray navigation bar, then *New Training Roster*:

When the *Save Training Roster* page loads, you will see a text box to name the roster, a place to list the trainees, and a place to list people with whom you’d like to share the roster.

Start by entering a name for the roster. Once you’ve entered the roster name, you can press *Save* at any time to save your changes.

After you’ve named your roster, press the *Add Trainee* button. Type in part of the name of the person you are trying to find. You can use *last, first middle* or *first middle last*. Do not use any wildcard characters, such as * or %. Press the *Find* button when you’ve typed in the partial name. If the system only located a single person with a matching name, that person’s information will be filled in automatically. Otherwise, you will be prompted to select the correct person from a list:

Keep adding trainees until you are done:
Sharing a Roster (optional):

Once you’ve populated the roster, you can similarly add people with whom you’d like to share the roster. People for whom you select View and Use will be able to view the roster, enter training based on the roster, and run completion reports based on the roster as well as make a copy. People for whom you select View, Use, and Edit will also be able to change the roster name, trainees, and with whom the roster is shared:

When you’re done with your roster, press the Save button. The system will bring you to the view page for the roster.
To make changes to the roster, including those with whom it is shared, press the *Edit Roster* button. The new roster will be listed under the *My Rosters* link:

**Entering Training for a Roster**

Once you have saved a roster, you can press the *Enter New Training* button to enter new training information for the members of the roster.

The members of the training roster will then be used to pre-populate the trainee list of a new training entry. You can remove trainees who weren’t able to attend or add other trainees as needed.
Running a Completion Report for a Roster

When viewing a roster (after having saved it or after having clicked on the link under My Rosters), you can press the Run Report by Roster to run a completion report based on the members in the roster.

The report will include all of the members of the roster. You can adjust the trainees listed in the report as needed as well as the completion cutoff date.