

Maintaining Your Alchemy Site: *User Maintenance*

Maintain an up to date user listing of active users using the checklist workflow below.

Task	Done	Action Required
Ensure of no duplicate records	<input type="checkbox"/>	Review user listing and validate users (if users have been added in Player)
Merge Records, if applicable	<input type="checkbox"/>	Use the merge function to consolidate multiple records into one record per user.
Add User	<input type="checkbox"/>	Enter new user to your Manager site.
Review and Add admin and add-on roles, if applicable	<input type="checkbox"/>	Review admin roles and add-ons to assign these to users. <i>Not all users will have these abilities.</i>
Subscribe User to Groups, if applicable	<input type="checkbox"/>	Subscribe user to appropriate groups. If these groups are subscribed to Learning Plans, their learning activities will automatically be available to take.
Archive Employee	<input type="checkbox"/>	Archive employee within the user listing page. <i>*You will still be able to pull training data, if needed.</i>

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Maintaining Your Alchemy Site: *Group Management*

Standards within your organization can help to ensure that groups and their memberships are organized and manageable. Below are tips and examples for maintaining your groups clean and in functioning order.

Task	Done	Action Required
Generate an organization-wide naming convention	<input type="checkbox"/>	-Initiate naming convention with new groups -Rename existing groups to new naming conventions -Ensure administrators are aware of naming convention
Review groups	<input type="checkbox"/>	-Delete duplicate groups. <i>User training records will not be deleted.</i> -Delete outdated groups with zero memberships
Designate Admins to Groups	<input type="checkbox"/>	-Designating more than one admin to a group you can ensure more than one admin can make group changes

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Maintaining Your Alchemy Site: *Course Maintenance*

Ensuring courseware is up-to-date is imperative for any training program. While Alchemy courses are industry vetted and updated with a cadence of 12 to 18 months, it is crucial that your company specific courses are also current.

Task	Done	Action Required
Create goals and objectives	<input type="checkbox"/>	Make sure company specific courses include competencies.
Categorize your courses	<input type="checkbox"/>	Classify your courses into categories. Example: Food Safety, Transportation, Warehouse, etc.
Consider Parent-Child Courses	<input type="checkbox"/>	When making translated courses, consider the parent-child course system to keep your courses clean.
Use a Naming Convention	<input type="checkbox"/>	Create a naming convention that includes the topic/subject and date it was edited. Communicate this to your organization.

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Maintaining Your Alchemy Site: *Learning Plan Maintenance*

When maintained, Learning plans make active curricula easily accessible and relevant across several work sites. The following list provides essential factors to take into account when maintaining learning plans. Refer to our Learning Plan Options article to learn about the different types of plans we have available.

Task	Done	Action Required
Review learning plan listings	<input type="checkbox"/>	-Retire outdated plans -Retire plans with no subscription -Update learning plans that are missing courses or need courses updated
Use a Naming Convention	<input type="checkbox"/>	Create a naming convention that includes identifying information starting with worksite, topic/subject of the plan or target group. Making it easy for administrators across worksites to use. Example: <i>Houston 30 Day New Hire Training</i>
Subscribe Groups to learning plans	<input type="checkbox"/>	Consider subscribing groups to learning plans.
Restrict Editing	<input type="checkbox"/>	Use the 'Restrict Editing' feature to limit editing plan details to the owner, Platinum and Diamond admins. Other admins may access the plan to subscribe learners.

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