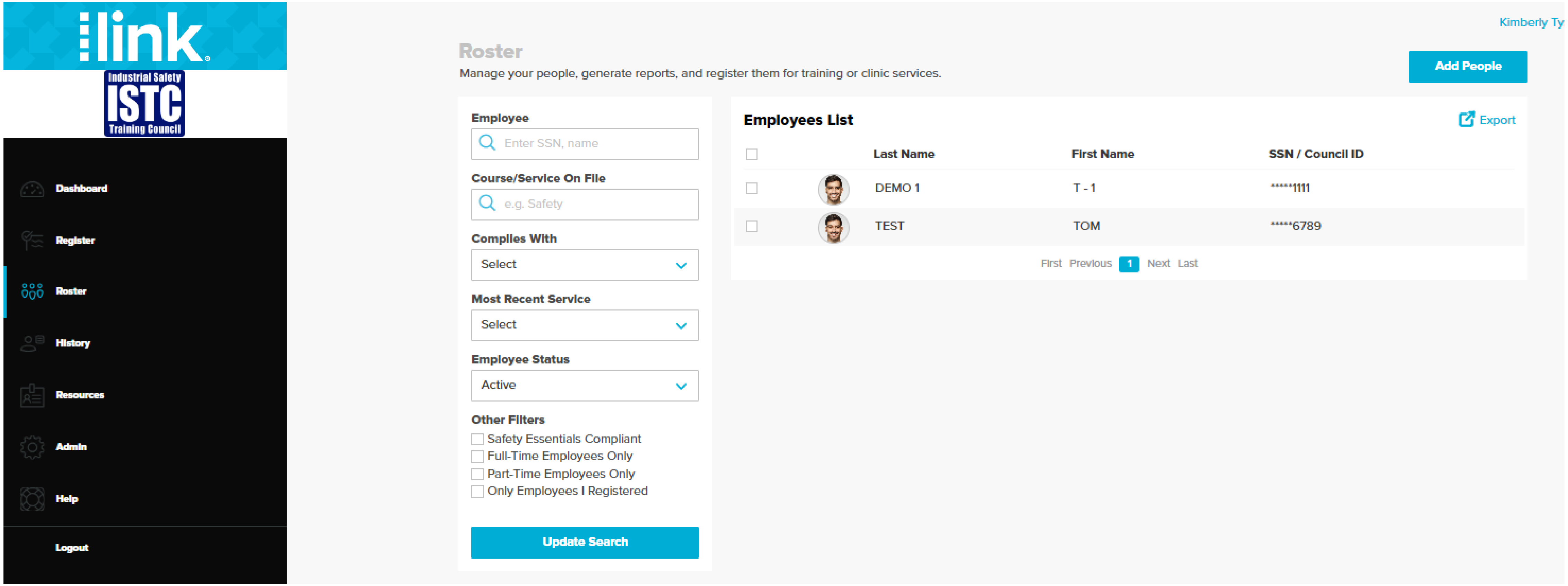
Link Training Manual

Table of Contents

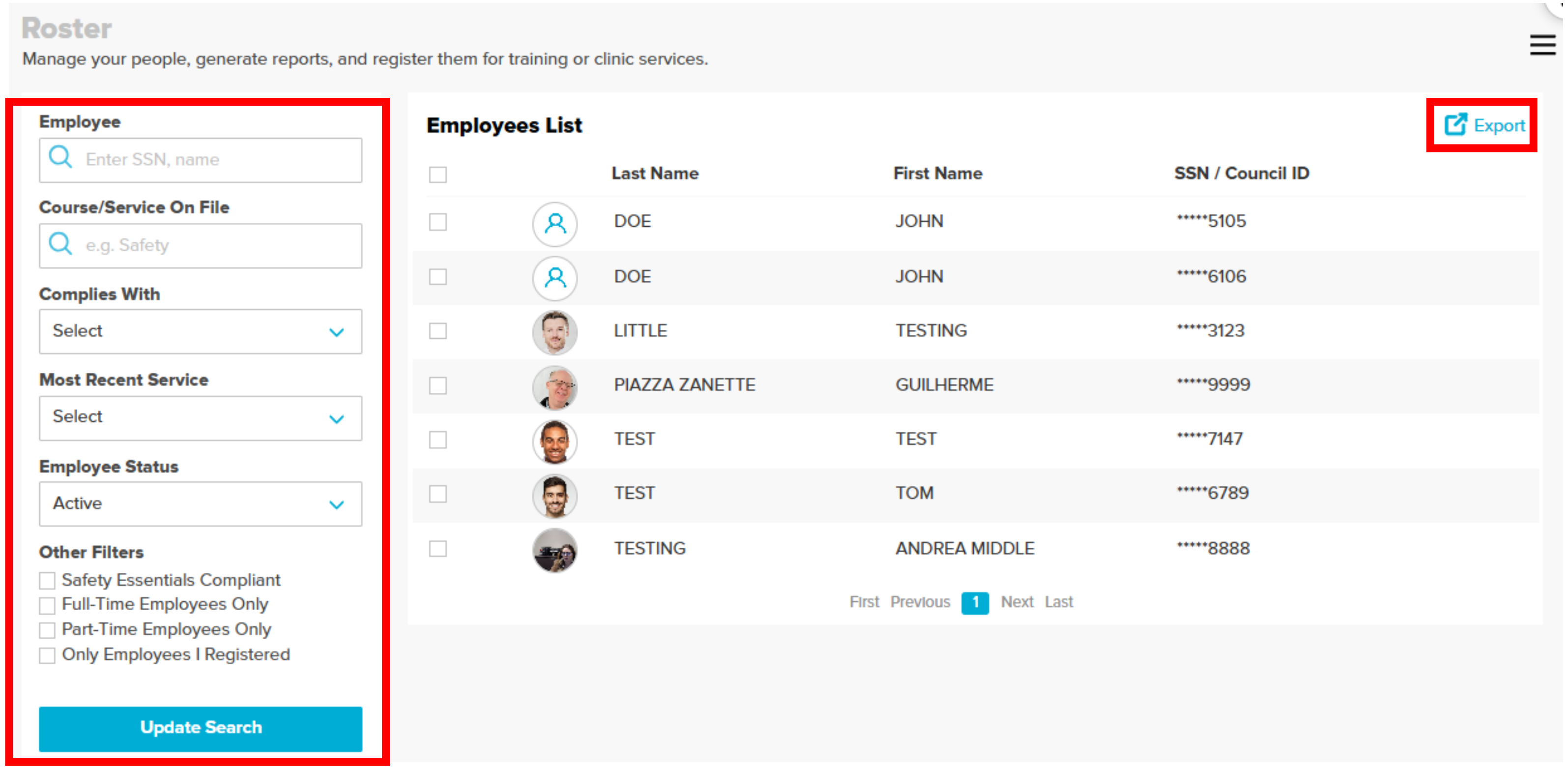
Roster

- This section allows you to add or remove employees from your company profile, view their training history, and generate reports.



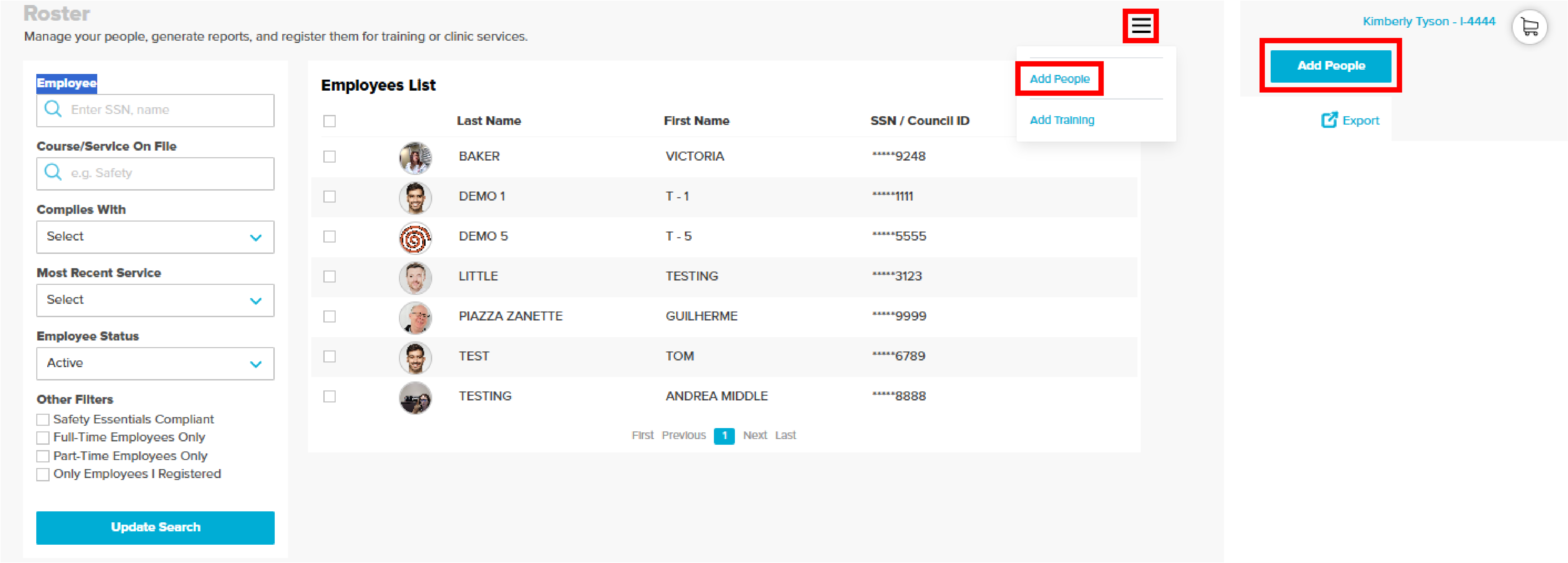
Roster Cont.

- To use the report feature, enter your search criteria and click “Update Search”.
- To export the report, click the “Export” button at the top right of the screen.



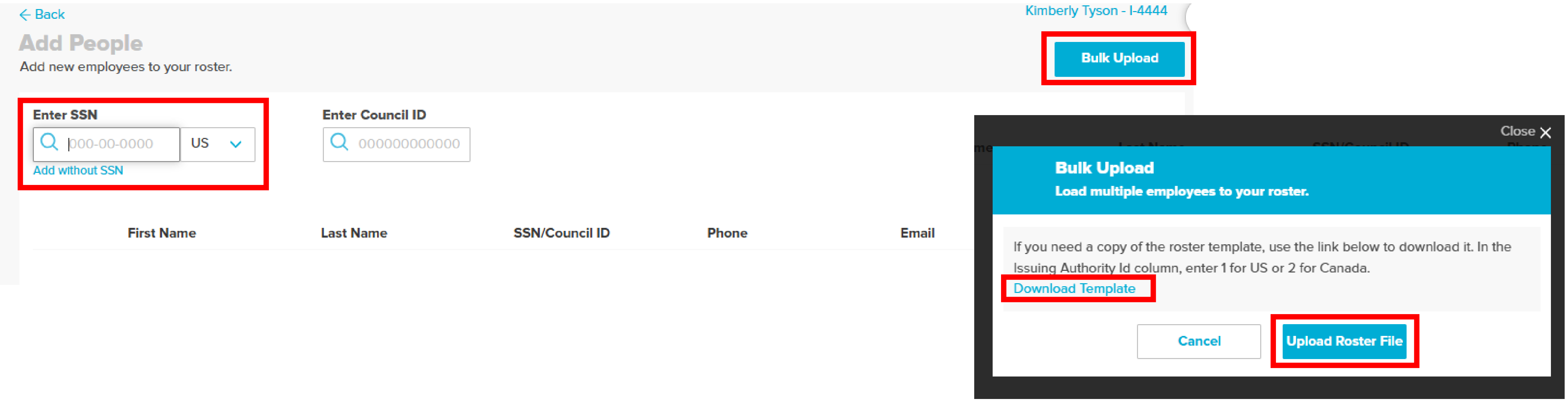
Adding Employees to Account

- To add individuals to your company roster, click the “Add People” button.
  - This option may be located under the settings section (3 lines)
  - Please note, by scheduling an individual, they are automatically added to your account.



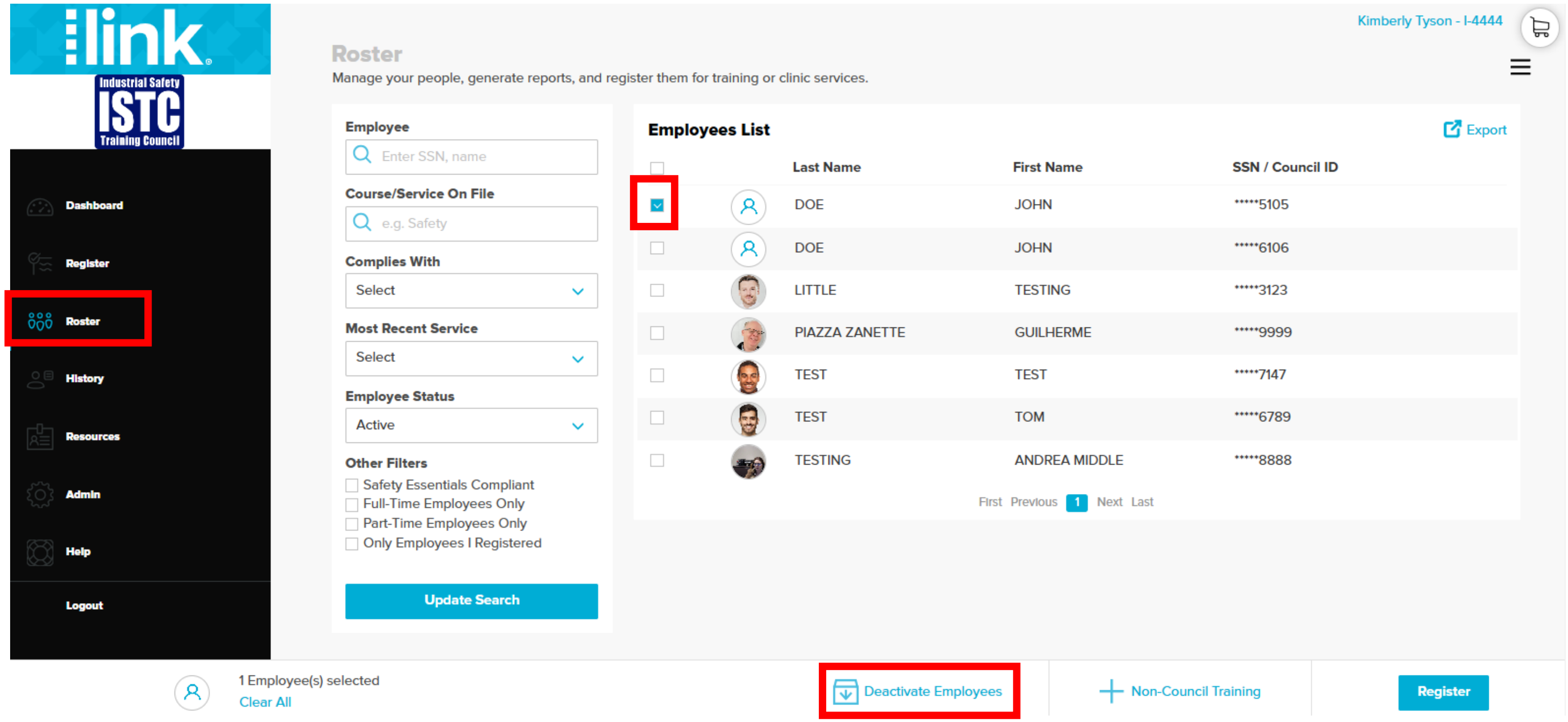
Adding Employees to Account Cont.

- Type in the individual's social security number in the "Enter SSN" box
- Add their phone number and email address and click the "Add" button
- You can click "Bulk Upload" to add multiple employees at once
  - You can either upload an existing file or download a template to create



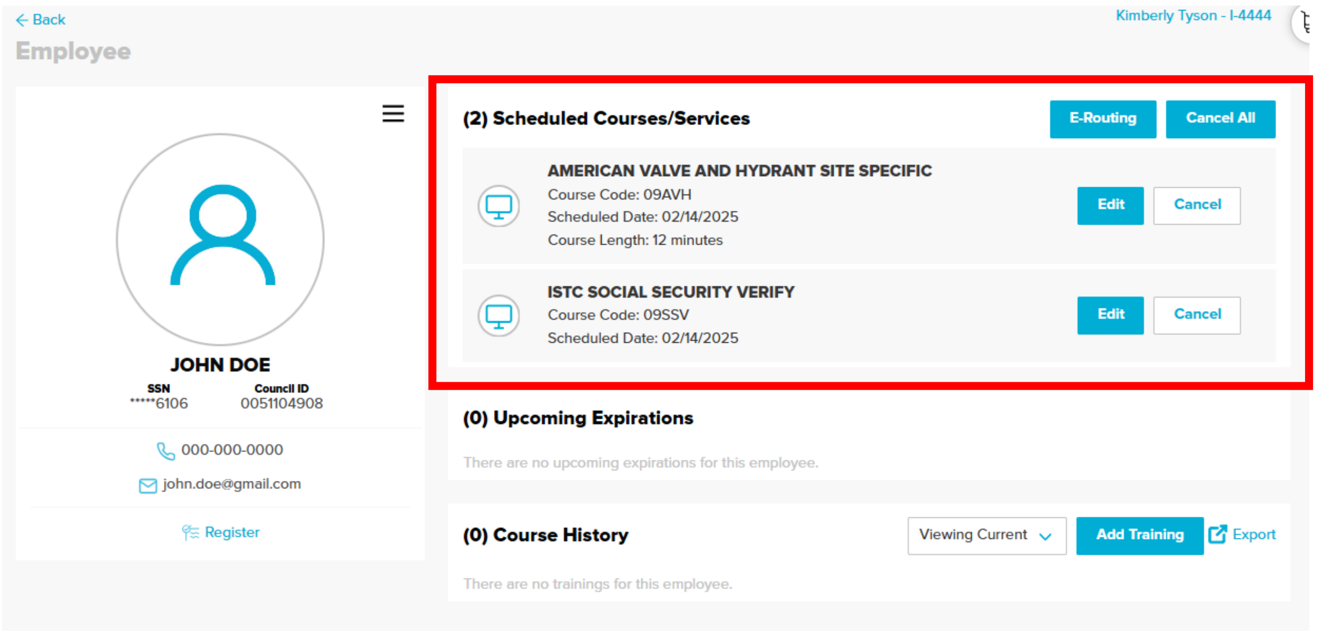
Deactivating an Employee

- To remove an employee from your company account, click “Roster” on the left side of the screen.
- Click the check box next to the individual(s)
- Select “Deactivate Employee”



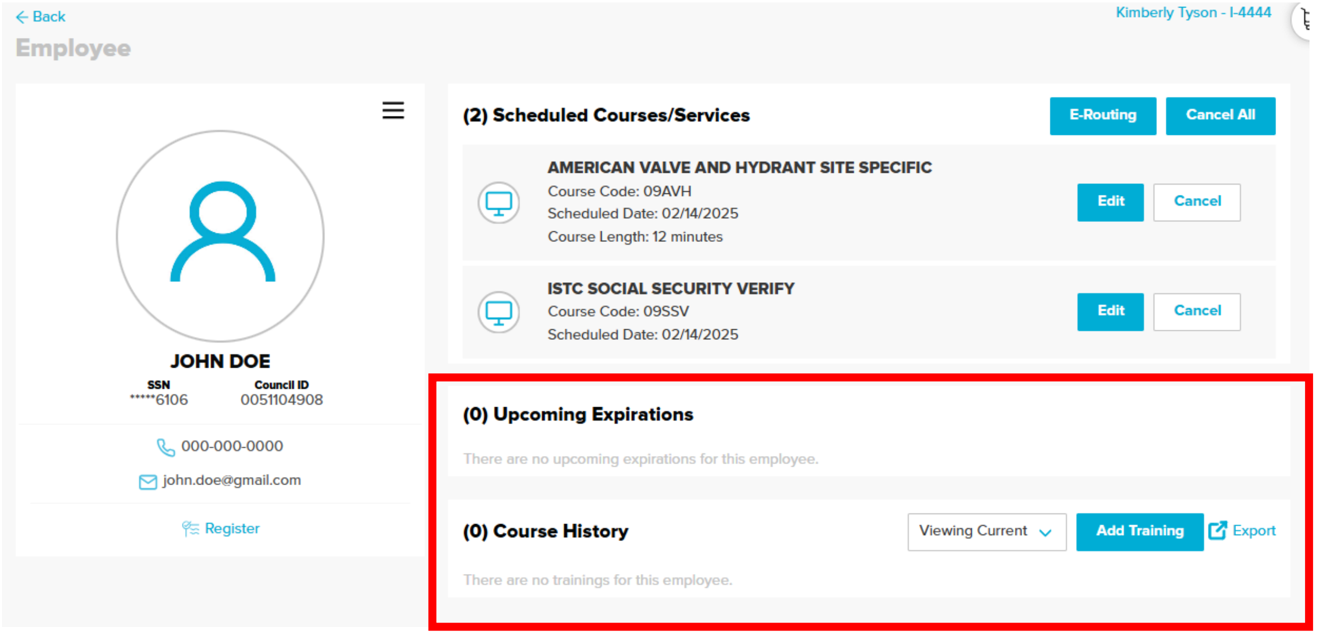
Training History

- To view an individual's training history, click “Roster” and select the person from the Employee List.
- The “Scheduled Courses/Services” section will display courses that are currently scheduled for completion.
- To change the course location, click the "Edit" button, update the location, and click “Save”.
- To cancel a training, click “Cancel” next to the product.
- To reprint a confirmation page, click the “E-Routing” button.



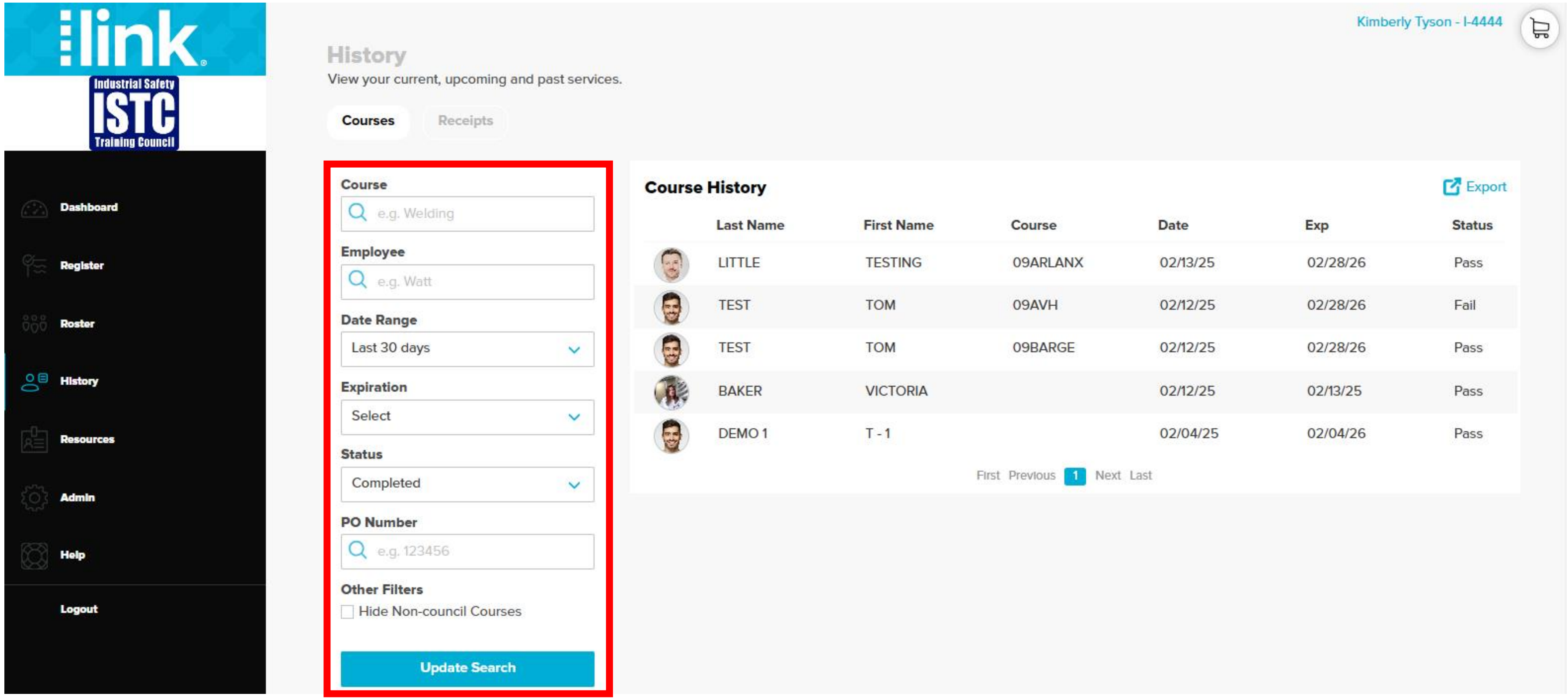
Training History Cont.

- The "Upcoming Expirations" section displays training that is about to expire and gives the option to register for it.
- The "Course History" section allows you to view the individual's full training history.
    - Use the filter option at the top right of this section to view current, expired, or all training.
    - You can also export the training history by clicking the "Export" button.



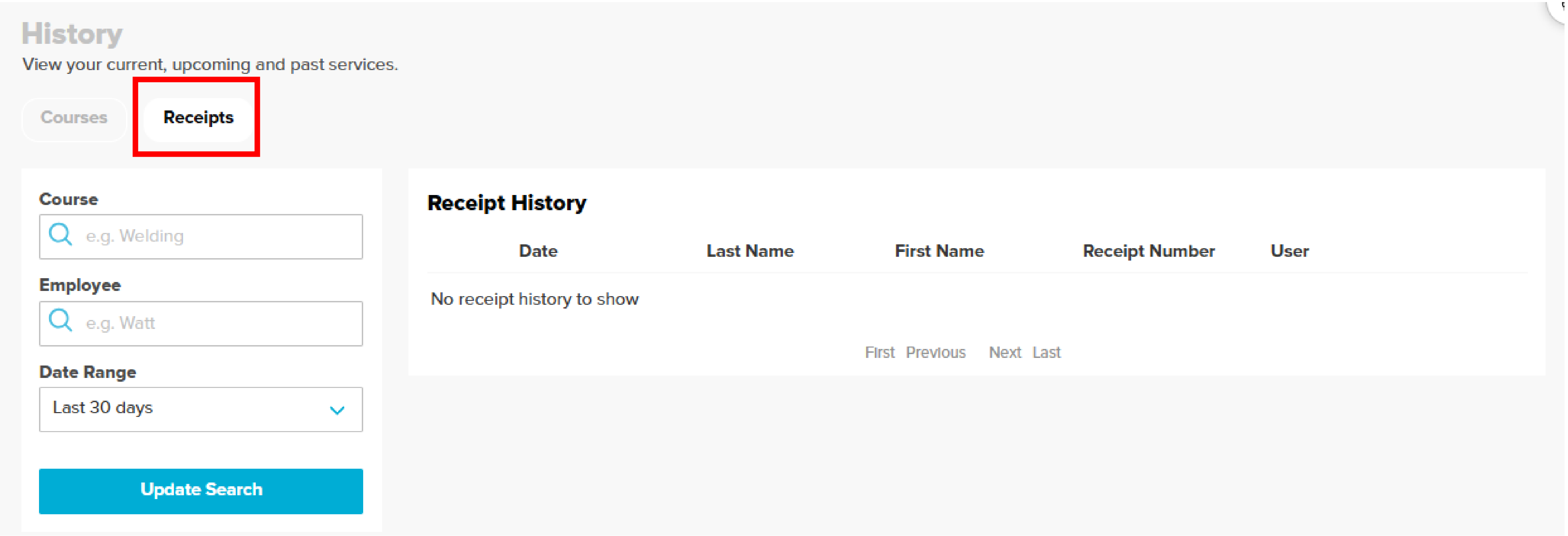
History

- The “History” section provides a report of all training records for employees who have completed training under your company account.
- Search functions are available on the left side of the screen to find specific records.
- The “Export” button can be used to download the generated report.



History Cont.

- If you've previously paid for scheduled training directly in the Link system using a credit card, you can view your receipts by clicking "Receipts" in the “History” section.



Additional Information

- For more information, please visit our website at www.istc.net, where you'll find resources such as training videos.
- You can also reach our customer service department at customerservices@istc.net or by calling (409) 724-2565.