The Compliance Manager
Quick Start Guide for System Users

The Compliance Manager is the ideal solution to track, report on, and automate the certification and license renewal processes. Offering an easy-to-use, graphical dashboard for system users, everything in the system is one click away. The Compliance Manager helps keep companies legal ensuring survivability and eliminates the hassles of scrambling to renew certifications and licenses at the last minute.

System Summary
The Compliance Manager easily works into any corporate network architecture as the infrastructure is cloud-based and mobile friendly. It is fully integrated with ADIGlobalAcademy online industry courses so users can automatically track CEUs taken online. The Document Manager tool allows for storing and assigning documents to boost productivity and reduce time for renewals by as much as 80%.The Compliance Manager attaches employees to companies to track their information. Employees can request to join companies and companies can claim employees so they are appropriately attached to companies. This also allows for technicians to move to a new company and take their system information with them.

The Compliance Manager allows for automatic email distribution at the 90, 60 and 30 day mark prior to license or certification renewals being due. Users know what they need to do and when to maintain their professional designation which greatly reduces liability of unlicensed workers being in the field. Additionally, the Compliance Manager brings increased productivity and streamlined collaboration through the sharing of documents within a centralized location.

All system users can access Technical Support should they have a technical need. Support can be contacted via email at support@adiglobalacademy.com and phone at 502-254-1506. Support is here to help you Monday – Friday from 8:00 AM to 8:00 PM EST.

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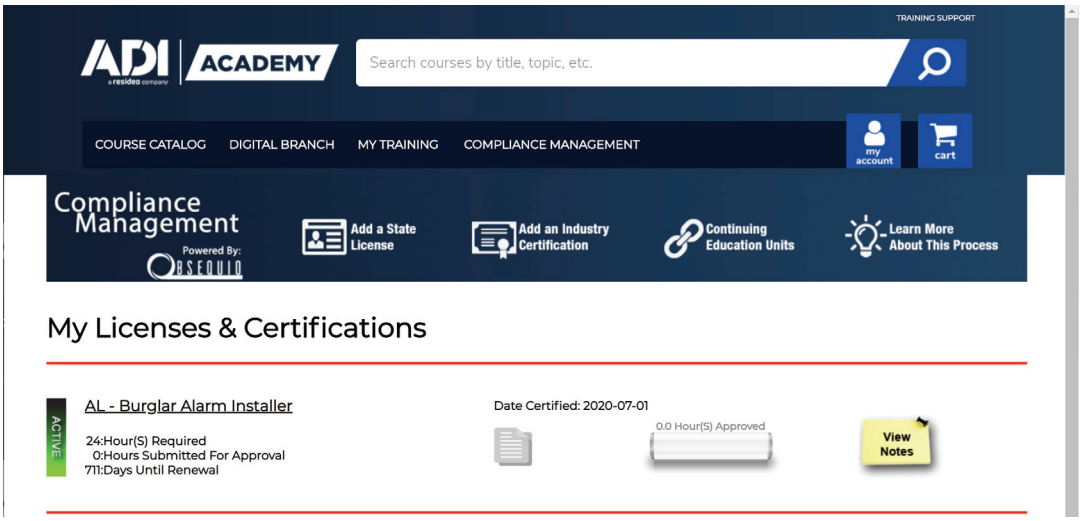
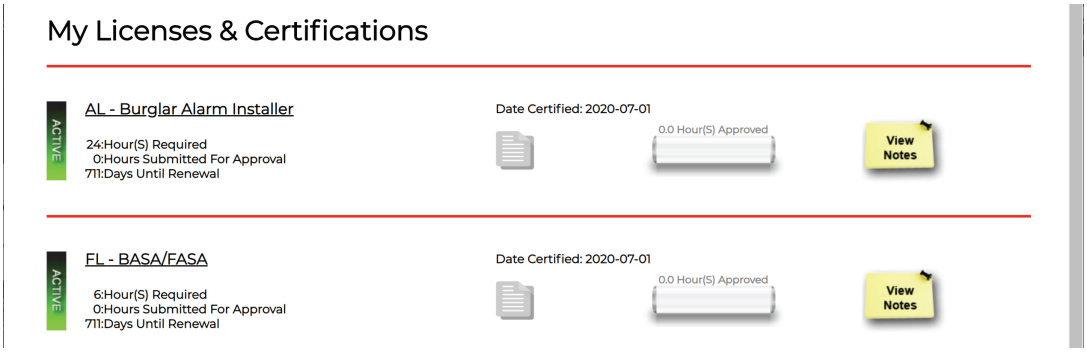
The User Interface



From the main dashboard, system users can see all the licenses and certifications being tracked for them. By scrolling through this list, the user is able to see what items are in need of attention and what items are active and need no attention at this time.



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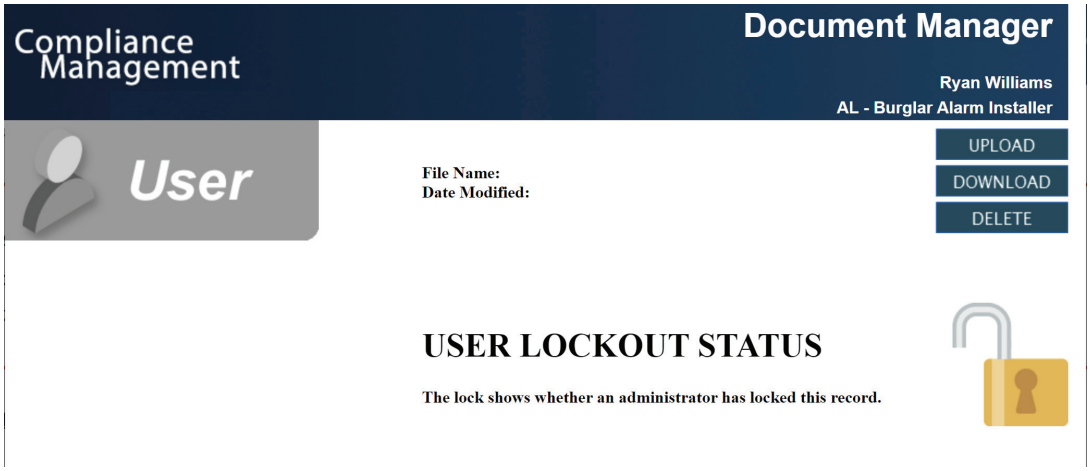
For each line item listed, the user can see quite a bit of information about the status of their certification or license. This includes the date the user was certified or licensed, how many CEUs (if any) are required to renew, the current number of applicable CEUs the student has taken, and the number of days to go until the line item expires.

The blue paper icon takes the user to the **Document Manager** tool. System users can upload one document per license or certification. Note – system administrators can upload two for a total of three documents. This feature allows the user to upload needed documentation such as a certificate of completion from a CEU course they attended. There is the ability to upload, download and delete the document.



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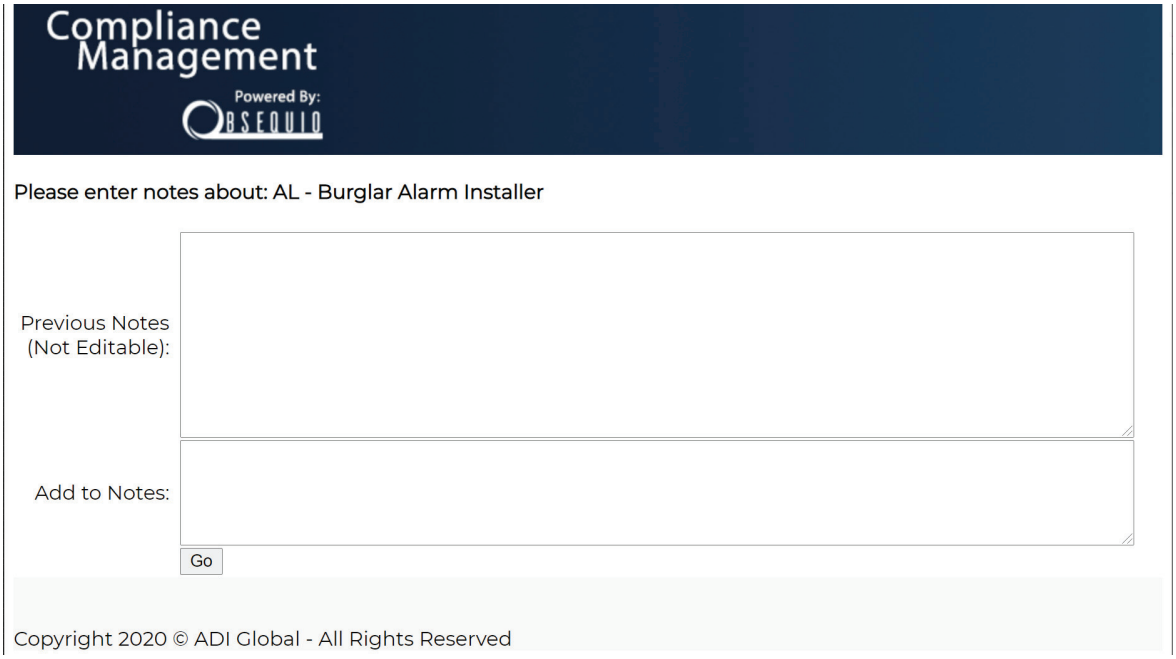
Once all the required documents are placed in the system, the administrator may lock the file. The lock icon lets the user know if their **Document Manager** has been put into lock down or not.

Clicking on the yellow button for **View Notes** launches the notes feature. Notes are added to the user file at the certification or license line item level. New notes can be added at any time. Historical notes cannot be edited and become a permanent part of the system record.



Submitting CEUs

For CEUs to be counted towards the renewal of a certification or license the system user must submit the CEU hours through the system. The system administrator then has the ability to add a note, perhaps to pose a question to the user, if necessary. The administrator then approves or denies the CEUs which will impact the battery graphic on the page which will fill up with each CEU added and approved.

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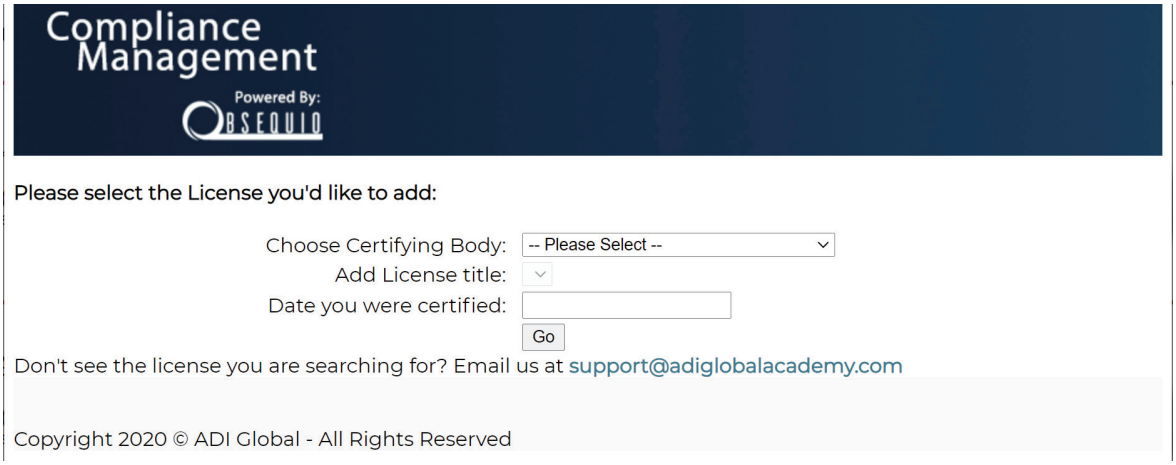
Add a State License

Users can add a license line item to their file by clicking this button. From the **Add a State License** screen users can select the license they want to add from a drop down list of available licenses. The licenses are listed by State. The user includes the date they were originally licensed. This triggers the system to tally the number of CEUs required and the renewal date for that license line item. If the license the user wants to track is not listed in the system they can get with their system administrator or email Technical Support at support@adiglobalacademy.com.



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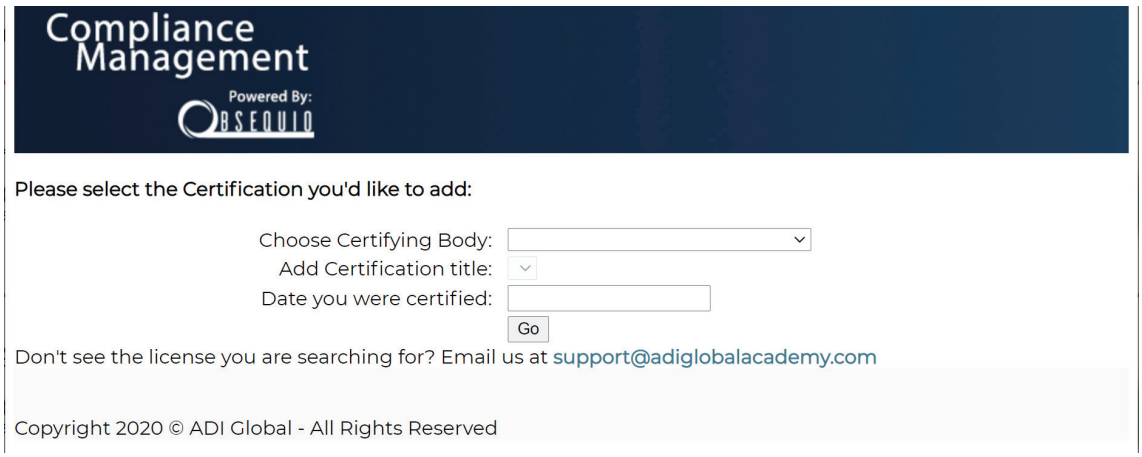
Add an Alarm Industry Certification

Like with adding licenses, the user selects the industry certification they wish to track from a pre-defined list within the system. Additionally, the user will add the date they were initially licensed. Based on system algorithms the number of CEUs needed and by when is determined as well as the license renewal date.

If the certification the user wants to track is not listed in the system they can get with their system administrator or email Technical Support at support@adiglobalacademy.com to have it added.



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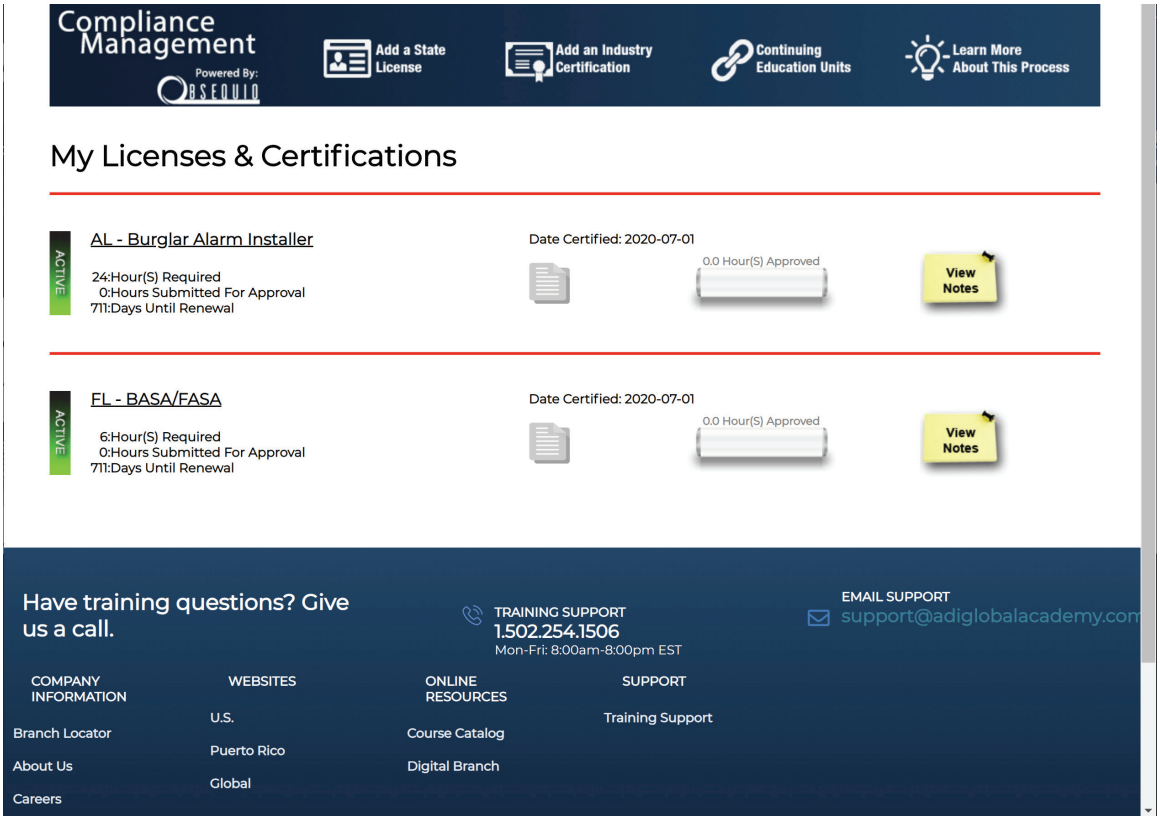
Continuing Education Units

All of the CEUs taken by the user are listed on the CEU dashboard. This list includes the following information about the CEUs:

- CEU Name or Title
- Date Completed
- Training provided by
- CEUs accredited by (if different from above)
- CEU number
- CEU hours
- Which license or certification the CEU should be applied to
- Status



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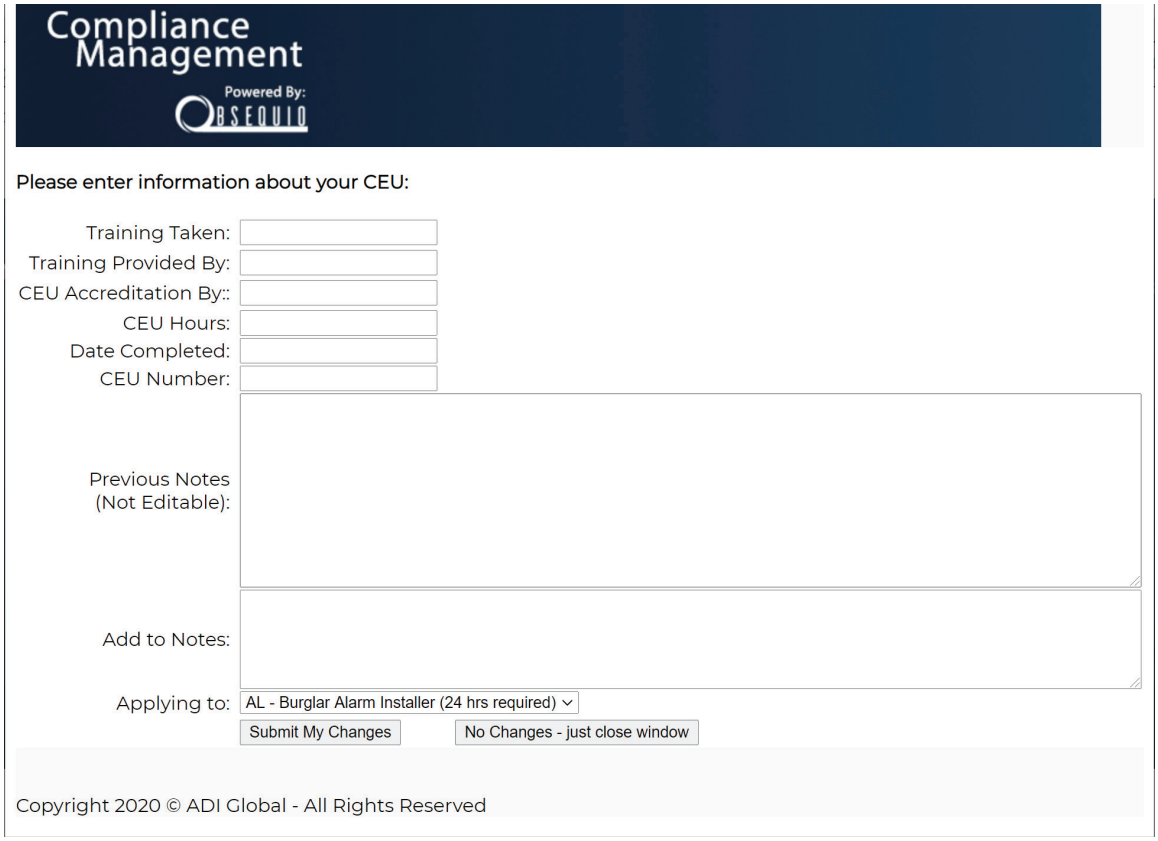
Add Continuing Education Units

By clicking the red “+” button on the CEU dashboard, the user can add CEUs that need to be reported. All of the items listed above that can be tracked for any CEU need to be entered from this page.