



Job Aid

CMS Navigation and Account Profile Setup

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Introduction

This Job Aid will walk you through the actions to effectively navigate through your personalized Competence Management System (CMS) account and setup your account profile preferences.

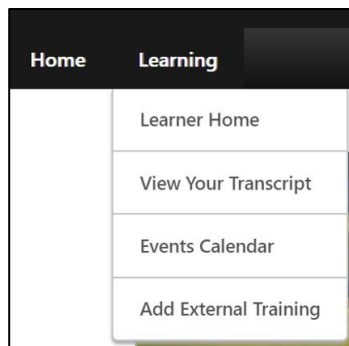
Your account is self-managed and allows you to maintain full control over your own training registrations, course selections, testing, and course completion. It also provides you're the ability to real-time access your training transcript details, certifications, and view your completed audit details.

Welcome Page

When you log into your account, you are automatically taken to your personalized welcome page. This page provides a view of learning objects and actions associated with your transcript, competencies, and pending evaluations.

To access the welcome page at any time, hover over the **Home** tab in the top navigation bar and select the **Welcome** option from the dropdown list.

1.



Top Navigation Bar

Use the top navigation bar to access tabs and pages such as: Home, Learning, Learner Home, View Your Transcript, Events Calendar, and Add External Training.

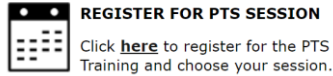
To access the pages under each tab, hover over the tab.

Please note that based on your access level, you will have different options in the navigation bar.

- **Learner Home:** This is your detailed learning page where you take charge of your personal development. You can also view your personal training information, course catalogs that are assigned to you, transcript view for status of training progress, learning and audit completions, etc.
- **View Your Transcript:** Displays all your learning curriculum (either selected or assigned to you) in a structure list.
- **Events Calendar:** Allows you to view and select available courses in a calendar view format. You access the course by clicking on the course title and to view course details, hover over the course title.
- **Add External Learnings:** This section allows you to register for external learnings. All external learnings go through an approval process, and the

information will be added to your transcript where you can follow the approval process by monitoring the status of the external training.

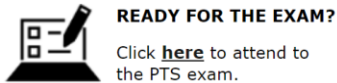
2.



Register for PTS Session

To register for a PTS training session and to select your session, click on the **here** link.

3.



Ready for the Exam?

Once you have attended the PTS training session, you can attend and complete the PTS exam by clicking on the **here** link.

4.



Visit your Learner Home banner

Clicking on this banner redirects you to the Learner Home screen that displays your learning objects in a detailed view.

Refer to the “Learner Home” section for further details.

5.



Your Transcript

Clicking on the “Your Transcript” heading launches your trainings that are assigned. You can also view and launch your trainings within this section.

6.



Competence

This section displays all your competencies with associated due dates and expiration dates.

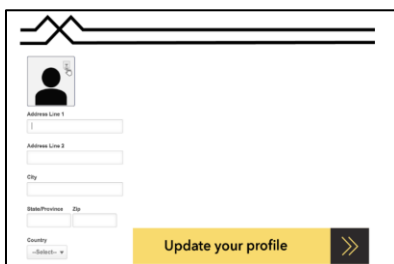
7.



Pending Evaluations

This section displays all your pending evaluations, if applicable.

8.



Clicking on the “Update your profile” button takes you to your account preferences where you update your photo and location information.

Update your Account Profile

The first time you log into your CMS account, it is required that you set up your account profile preferences, which includes your photo and location details. The **My Account** area allows you to modify your preferences, manage social accounts, manage mobile devices, manage course reviews, and view order history.

It's important that this information be completed and updated regularly to ensure it is relevant. This is the photo that will be used for your temporary PTS certificate and PTS ID Card, and it will be sent to the address listed in your account profile.

Warning: It is required that you complete your account profile details and upload a photo that meets specifications immediately before registering for a PTS session. Without a photo or details, you will not be able to successfully complete the PTS certification.

Account Profile Photo

1. Click on the **Update your profile** button.
2. You are now in the account preferences page. To update your photo, click on the dropdown arrow on the photo image and select the **change** option.



3. Click on the **Choose File** button to browse and upload a profile photo. Once selected, click on the **Upload** button. The recommended size is 150 x 174 pixels. Use the cropping and focus tool to adjust the view of the photo once the upload is complete.

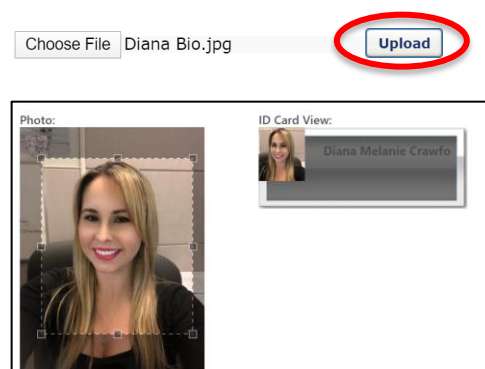
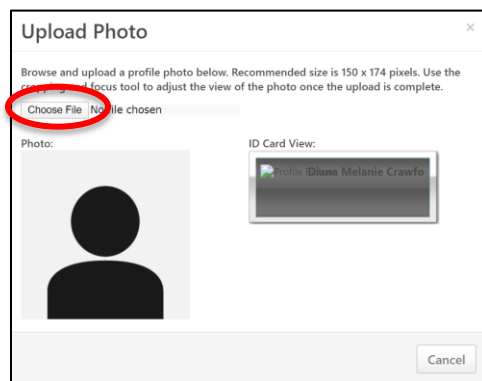


Photo specifications:

The head shot photo you attach must be current and include the following:

- Clear head shot without being blurred or pixelated.

- Forward facing.
- Portrait orientation, not landscape.
- In colour (no black and white photos).
- Include top of shoulders.
- No hats or sunglasses.
- Shirt must be worn.
- Cannot be a secondary photo (e.g. taking a picture of a government issued ID or of a printed picture).

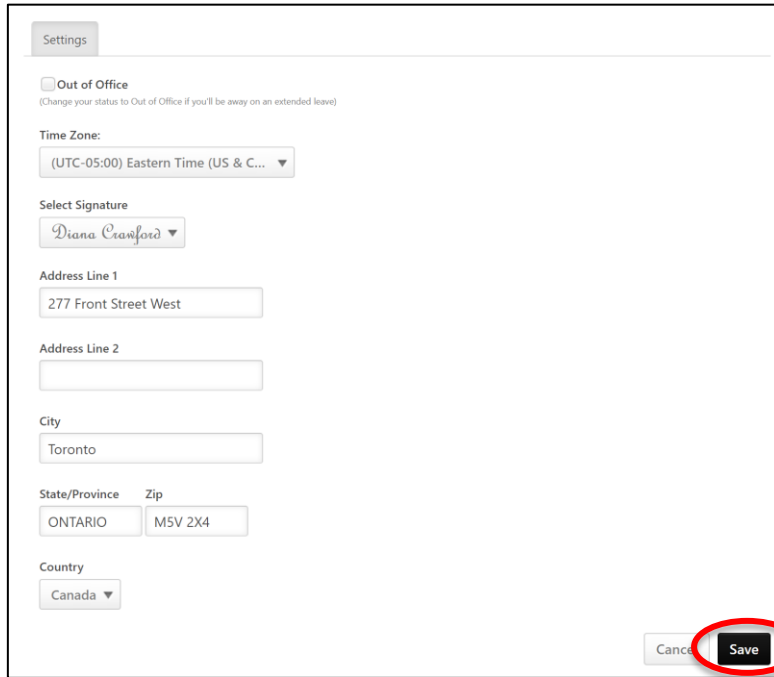
4. Click on the **Save** button.

Account Profile Location

From within the account preferences page, under the **Settings** tab you specify your location details.

1. **Out of office:** Select this checkbox to change your status to Out of Office if you'll be away on an extended leave.
2. **Time Zone:** Select your time zone using the dropdown list.
3. **Select Signature:** Select a font style for how you would like your signature to look on certificates and documentation using the dropdown list.
4. **Address Line 1:** Enter the address to where you would like your PTS ID Card sent. This can be a personal or work address.
5. **Address Line 2:** Enter additional address information. E.g. P.O. box
6. **City:** Enter the city the address resides.
7. **State/Province:** Enter the state or province the address resides.
8. **Zip/Postal Code:** Enter the zip or postal code the address resides.
9. **Country:** Select the country your address resides using the dropdown list. Note: It does not default to Canada.

10. Validate that the information is correct and click on the **Save** button to save your profile preferences.



The screenshot shows a 'Settings' form with the following fields: 'Out of Office' (checkbox), 'Time Zone' (dropdown menu showing '(UTC-05:00) Eastern Time (US & C...)', 'Select Signature' (dropdown menu showing 'Diana Crawford'), 'Address Line 1' (text input with '277 Front Street West'), 'Address Line 2' (empty text input), 'City' (text input with 'Toronto'), 'State/Province' (dropdown menu with 'ONTARIO') and 'Zip' (text input with 'M5V 2X4'), and 'Country' (dropdown menu with 'Canada'). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button circled in red.

11. A **Save Notification** popup appears where you can click the **Close** button to return to your account profile or click on the **Go to home page** button which takes you back to the Welcome page.

Account Profile Preferences

Within your account profile, you can manage your preferences relating to your email and password.

1. From within your My Account Preference page, click on the **Options** button. The dropdown list appears with the options to **Change Email Address** or **Change Password**.



The screenshot shows a 'Preferences' page with a user profile picture and name 'Diana Crawford Metrolinx'. On the right side, there is an 'Options' dropdown menu circled in red, which has opened to show two options: 'Change Email Address' and 'Change Password'. Below the dropdown is a QR code and a 'Print QRCode' link.

- **Change Email Address:** Select this option to change your system email address. This email address is used to send notifications and reminders from

the system. You must enter the new email address twice to ensure it is entered correctly.

- **Change Password:** Select this option to change your system password. A pop-up appears with the system password requirements. You must first enter your current password, and then enter your new password. You must enter the new password twice to ensure it is entered correctly.

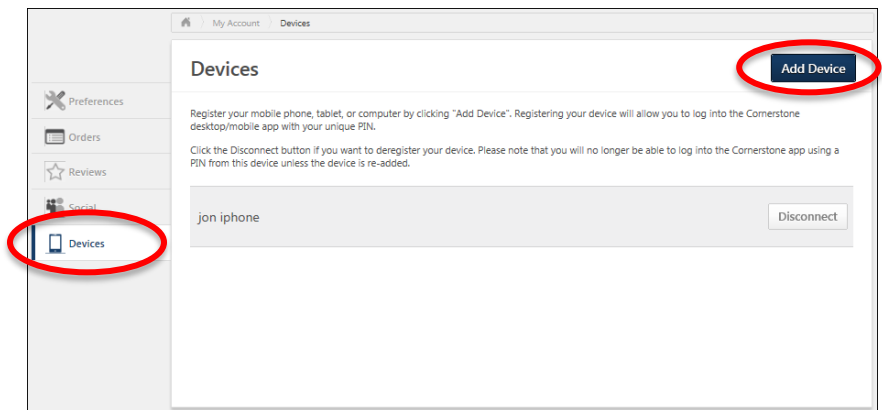
Note: If these options are not available, it is because they are not enabled by the system administrator in Password Preferences.

Add Device

The Devices tab enables you to register your mobile phones, tablets or computer. Users must register their mobile phone, tablet, or computer on this page in order to log in to the Cornerstone Learn application using a unique device key.

You can also disconnect devices and mobile applications.

1. Click on the **Devices** tab in your account profile.
2. To register a device, click on the **Add Device** button.

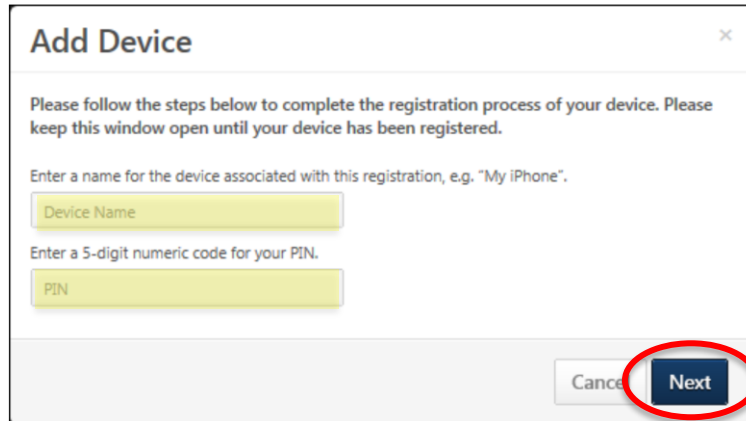


3. The **Add Device** pop-up appears. In the first field, enter a name for the device. For example, if it is a mobile phone, you may enter "Mobile Phone" or the brand of mobile phone.

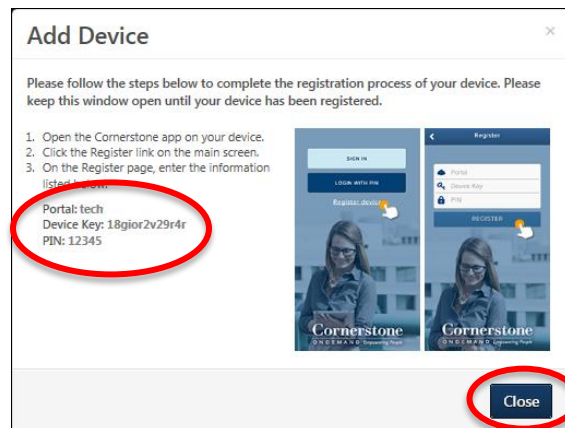
Note: The Device Name entered here does not persist on the Devices page after a user's initial login to the Learn App.

4. In the second field, enter a **temporary five-digit numeric PIN**. This PIN must be five numbers, and it will be used during the Device Registration workflow, before configuring a permanent six-digit PIN which will be used to log into the Learn App from then on.

5. Select the **Next** button to proceed to the next step.



6. The next step displays instructions that must be completed within the Learn app. Do not close the pop-up until the registration process is complete within the Learn app because the **Device Key** and **Temporary PIN** information is required to register the mobile device within the app. The portal name will be pre-populated.
7. After completing the registration process, click on the **Close** button. The registered mobile device appears in the Devices page.



Disconnect a Registered Device

To disconnect a registered device, in the **Devices table**, select the **Disconnect** button next to the appropriate device. This opens a confirm pop-up.

Click on the **OK** button to disconnect or click on the **Cancel** button to stay connected.

After removing your device, you will not be able to log in using that device again, and a new pairing must be created.

Learner Home

The Learner Home page is your detailed learning page where you take charge of your personal development.

It's a central location that you can view your personal training information, course catalogs that are assigned to you, transcript view that displays all your learning curriculum, status of training progress, learning and audit completions, time allotted to training curriculum, etc.

Navigate through this page by hovering over the information to identify interactive links.

