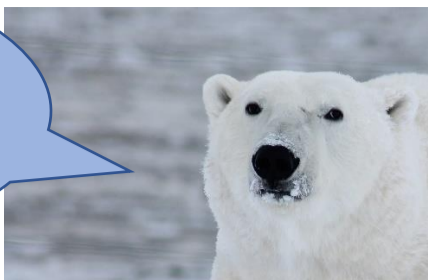


# GETTING STARTED



**User Tip:**  
Browse to the CQtracker website on your phone, and set up a shortcut link for quick access

**DID YOU KNOW?**  
You can customise your CQtracker experience by selecting a background to display – click on your name in the top right corner, click Settings, select your background, and save.  
Try it!



**STEP 1**  
Add certifications

**STEP 2**  
Add people

**STEP 3**  
Add certifications to people



**User Tip:**  
Date formats are yyyy-mm-dd

**STEP 4**  
Add Sites/Events

Add certifications to Sites/Events

**STEP 5**  
Set up certification groups

**Step 1: Add certifications to your organisation’s list**  
([Select view: Certifications, or 3<sup>rd</sup> option in the list](#))

- It all starts here: These are the certifications that will show up in the dropdown list when you go to enter certifications for a person or for a site/event. An empty dropdown list simply means that you have not associated any certifications with your organisation.
- Either select existing certifications that are already available in the master list or create your own certifications that are only for internal use within your organisation.
- If you do not see a certification in the master list which is likely a common one used across industry or by people in general, you may submit a request to CQtracker to have it added to the master list.

**Step 2: Add people**  
([Select view: People, or 1<sup>st</sup> option in the list](#))

- Set up the people for whom you wish to track certifications in the system.
- Grant user permissions depending on the access levels appropriate to each user.

**Step 3: Add certifications to people**  
([Select view: People](#))

- Click on a person’s name (either first or last) to manage the list of their certifications.
- When adding a certification to a person, the list of available certifications from which to choose is the list you have populated in the first step of this process (certifications you have associated with your organisation).

**That’s it! That’s all you need in order to be able to track certifications for people within your organisation. If desired, you may use some optional features for further functionality, as follows:**

(Optional)

**Step 4: Set up Sites/Events/Roles/Responsibilities/Requirements**  
([Select view: Sites/Events, or 2<sup>nd</sup> option in the list](#))

- Add sites/events if you wish to be able to see which people within your organisation are qualified (meet the certification requirements) for certain purposes. For example, you may have a defined role within your organisation, or a client may have a site or project with certain requirements that must be met.
- Click on the name of the site/event to manage the list of certifications associated with that particular site/event/role/requirement.
- Run CQtracker reports to see which of your people are qualified to fulfill the requirements of a particular site/event.

**Step 5: Set up certification groups, if desired**  
([Select view: Certification Groups, or 4<sup>th</sup> option in the list](#))

- Certification groups are useful if there is a hierarchy of related certifications. A person holding a higher certification in the hierarchy will automatically be deemed to hold all lower certifications if these relationships are set up in certification groupings.
- Hierarchies are established via “parent/child” relationships. Set up a relationship for each pair of certifications within a grouping to indicate the hierarchical relationship.
- Example: Say there are three classes of driver’s licence—A, B, and C—with A being the highest in the hierarchy. Anyone with a Class A licence is deemed to also hold a Class B and Class C licence, and anyone with a Class B licence is also qualified for a Class C. You would set up the parent/child relationships as follows:
  - Parent: A → Child: B
  - Parent: A → Child: C
  - Parent: B → Child: C

Now, if all you care about is whether a person holds a valid driver’s licence, set up a certification called “Driver’s licence” and establish parent/child relationships as follows:

- Parent: A → Child: Driver’s licence
- Parent: B → Child: Driver’s licence
- Parent: C → Child: Driver’s licence

In this way, anyone holding a Class A, B, or C licence will automatically meet the “Driver’s licence” requirement.

Example:



Questions?

Contact us at [support@cqtracker.com](mailto:support@cqtracker.com) or go to Support and create a ticket