

# EHS Training Reconciliation Quick Guide

Navigate to SAPWeb


1. From <http://web.mit.edu/ehs-ms> select the 'Training Reconciliation' link
2. Or, type in the url: [web.mit.edu/sapweb/](http://web.mit.edu/sapweb/)
3. Click the *EHS* tab


The Training Reconciliation function is used by Training Reconcilers, typically an EHS Rep, to confirm, edit or create a relationship between an individual and a PI or Supervisor for the purpose of training. EHS Coordinators will use this function to assign new Training Reconcilers and can also create and edit relationships between trainees and PIs. EHS Lead Contacts have the same authorizations as Coordinators. A Training Needs Assessment DLC Reconciler can be assigned to edit Reconcilers and trainees for an entire DLC.

## To View Reconcilers and/or Trainees



Click **Training Reconciliation** on the EHS tab of the SAPweb page. The **PI/Supervisor Affiliation** screen will appear.

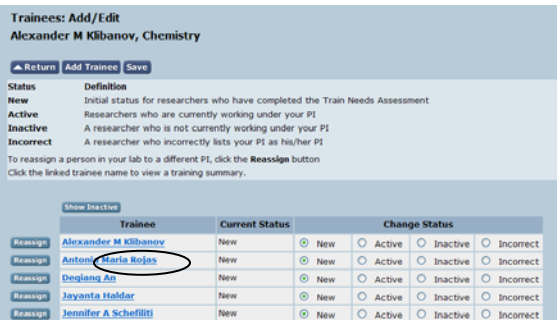
Click the  to open a DLC and see PI names. You may only see one DLC or one PI Name.

Click the  next to a PI or Supervisor name to see a list of Training Reconcilers and/or.

Note: EHS Coordinators and Lead Contacts will see Reconcilers and Trainees. Reconcilers will only see and be able to edit Trainees for whom they are responsible.

## To Review or Edit a New Trainee

The most frequent use of the Training Reconciliation function will be to confirm the status of a new trainee. Although Reconcilers can manually enter trainees into the system, the system automatically adds a trainee into the system when they complete their online Training Needs Assessment. Reconcilers can check the list of trainees associated with their PI/Supervisor at any time, but will be sent an email reminder twice a year to update the list of trainees. The default months for this are October and June but departments can choose two months that are better suited to their schedules.



On the **PI/Supervisor Affiliation** screen click the **Edit Trainee** button. The **Trainees: Add/ Edit** screen appears.

There are four possible Status settings for a trainee. Click the circle next to **Inactive** or **Incorrect** to change the status. You must click **Save** to make your change permanent.


Choosing **Incorrect** will remove the person from the list of trainees associated with this PI/Supervisor.


Note: The **Hide/Show Inactive** button allows you to hide or show trainees who have an Inactive status.

You may also Reassign a trainee to another PI/Supervisor by clicking the **Reassign** button to the left of an individual's name. If you only have access to a single PI, then the reassign button is not displayed.

## To Add a New Trainee

Click **Training Reconciliation** on the EHS tab of the SAPweb page. The **PI/Supervisor Affiliation** screen will appear.

Click the  to open a DLC and see PI names. You may see only one DLC or one PI Name. PIs are always grouped under a DLC. You can have a DLC without a PI, but you cannot have a PI without a DLC.

Click the  next to a PI name to see a list of Trainees currently listed for that PI.

Click the **Add Trainee** button. The **Search for Trainee** button appears.

Enter all or part of the first and/or last name of the Trainee you wish to add and click on the **Search** button.

Select the desired name from the **Search Results** by clicking on the name.

You may repeat this process to add more trainees.

Each time you add a trainee the **Trainees: Add / Delete** screen appears.


From this screen you may change a trainee's status, delete the trainee or reassign the trainee to another PI or Supervisor if you have authorization to update the list for multiple supervisors.

See the section *To Review or Edit a New Trainee* above.



When you are finished, click the **Return** button.

**Note: Training Reconciliation updates take 24 hours to be reflected in the web-based training reports.**

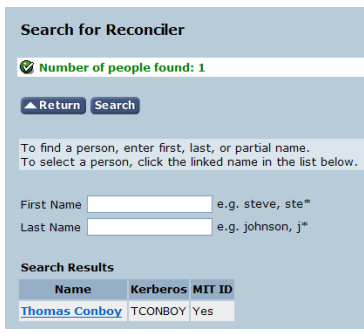
## To Add a New Reconciler



On the SAPweb page on the EHS tab select **Training Reconciliation**. The **PI/Supervisor Affiliation** screen will appear. There you will see any DLCs for which you are a Training Reconciler.

Click the  to open a DLC and see PI names.  
Click the  next to a PI name to see a list of Training Reconcilers and Trainees for that PI.

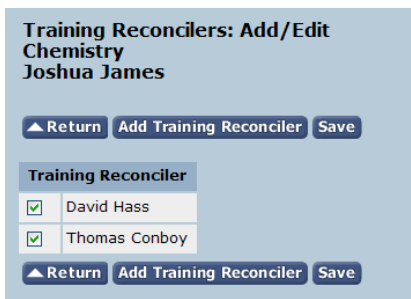
Click the **Add Training Reconciler** button.



Enter all or part of the first and/or last name of the Reconciler you wish to add and click on the **Search** button.

Select the desired name from the **Search Results** by clicking on the name.


You may repeat this process to add more reconcilers.

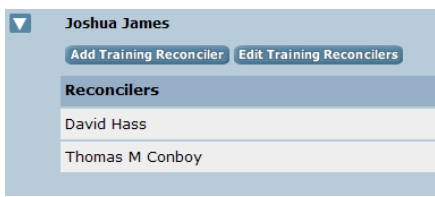


The Training Reconcilers: Add / Edit screen appears with a list of all reconcilers including the new one.

You may uncheck the name of any reconciler you wish to remove. Doing this will remove reconciler access for this person.

You must click the **Save** button to save any additions or deletions. You should see this message.

 **All Training Reconcilers updated successfully**



Click the **Return** button to go back to the **PI/Supervisor Affiliation** screen. You will see the changes you have made.

Note: The **Edit Training Reconcilers** button will take you to the **Training Reconcilers: Add / Edit** screen shown in the previous panel.

Click the **Home** button in the upper right corner of the screen to return to the SAPweb page.