RiskTool Advantage®
Administrator Guide

This document describes how to manage your company's use of RiskTool Advantage®.

Things to Know in Advance

Here are some important things you need to know before your employees start using it.

1. Everyone will need to provide an e-mail address, which is used for password resets or in case of forgotten passwords. You should determine whether it's permissible for employees who don't have "work" e-mail addresses to use personal e-mail addresses such as Gmail or Yahoo for work-related purposes. **If a person has a fake (non-work, non-personal) e-mail address linked to their account, they will never receive password reset e-mails, and you will need to relay any reset requests directly to and from us**.

2. You will need to send us a list of your company's Locations and Departments if you want to assign training to people based on where they work, or in what part of the company, and for reporting purposes. The list can be as long or as short as you like. Even if you have dozens of Locations, you can use a single one called "Office" if all of those locations are offices. For Department, you could use "N/A" if you don't plan to assign training based on what department people are in. If you don't want to get that specific, you will always be able to assign training to people by name. However, for setup purposes, we need at least one Location and one Department, even if it's yours.

3. "Client Admins" have full control of their company's training activities. As "Client Admin," you will be able to Add, Edit and Deactivate trainees, Assign training to people individually or by department or location, Generate Excel-based training reports, and even create customized training courses for *your* employees only, which can include video content, documents, and quizzes.

4. Passwords expire after 90 days. The system will require you to change it if you try to log in after the 90 days have expired.

5. For security reasons, you will be automatically logged out of the system after 4 hours, though you will receive warnings before that happens. If you need to continue working, just log back in.

6. RiskTool Advantage can be accessed at https://aig.com/rta.

7. Please e-mail any questions or problems to:
   a. AIG clients: risktooladvantagesupport@aig.com
   b. Glatfelter clients: RTAsignup@glatfelters.com

Getting Set Up

1. If you don't want to add each employee to the system manually, request a preformatted to complete and send back to us. It asks for the following employee data:

   - User First Name
   - User Middle Initial (optional)
   - User Last Name
   - User e-Mail Address (should be a "work" e-mail address, not personal)
   - Company Name
   - User's Employee ID (optional)
   - User's Work Department
   - User's Job Role
   - User's Manager's First and Last Names (optional)
   - User's Work Location
   - User account deactivation date, if a temporary employee
   - If you want the user account activated immediately upon being created (default is Yes)
   - If you want the user to receive an e-mailed notification upon being activated (default is Yes)

2. User Job Roles, Locations, and Departments are used so that training can be quickly and easily assigned to all employees at the same work location or department. Locations and Departments can be whatever you want them to be. More can be added later, but you won't be able to do that yourself and will need to contact us. You don't have to provide these, but it gives you more flexibility in terms of how training gets assigned.

3. There are three levels of system access:
   - **Client Admin** – the person who will oversee the use of the system at your company – Client Admins have full control over the system at your company. We suggest having just one Client Admin, plus a backup
   - **Site Manager** – local supervisors/mid-level managers who may want to assign training to their staff directly rather than going through the Client Admin
   - **Site Workers** – the personnel who will use the system only to take assigned training

Adding Users

If you have a large number of users ready to start taking training, you may find it more convenient to send us a list of everyone you need to add to the system – e-mail us at one of the below email addresses to request a special pre-formatted Excel template.

- AIG clients: risktooladvantagesupport@aig.com
- Glatfelter clients: RTAsignup@glatfelters.com

Alternatively, and at any time, you can add users manually – however, you MUST have first provided us with a list containing at least one Department and one Location. On the main menu, click **Users**, then select **Add User**.

Complete all fields highlighted in yellow and marked with a red asterisk. The Department and Location fields will contain the data you have already provided us. See above.

The **Expiration** setting is for temporary or seasonal staff, and the system will disable (but not delete) their user accounts on the date provided.

The "Activate user at end of creation process" defaults to On, meaning the user account will be functional as soon as you've completed it. They will receive an e-mail from AIG notifying them that their user account has been created, so before creating their accounts, you may want to notify them to expect it, so that they don't mistake it for a "phishing" e-mail.

Click **Create User** when done and watch for a green confirmation message.

Viewing Users

To review the list of users, on the main menu, click **Users**, then select **View Users**. You will see a Dashboard showing information about their activity in the system.

The list of users is below that, and it can be sorted by various criteria, and by clicking "Show Filter," you can filter the list by various criteria.

If you select one or more users by clicking the checkboxes next to their names, you can Activate them (if they're Deactivated), Deactivate them, Edit their profiles, or Assign Training to them. There are other ways to assign training, elsewhere in the system.

Clicking a user's name will display their profile, and below that a list of the courses they have been assigned. To edit their profile, click the "three dots" button across from their name on the profile page, and select "**Edit.**" Fields in grey cannot be edited.

Reviewing Course Contents

Using the **Training** menu, click on **View Training**. The course catalog displays with the subjects on the left, the contents of the selected subject on the right. Locate a course you want to review and click the **View Details** link below the description.

Scroll down to the **Training Items and Quizzes** section and below the title is an icon indicating whether the course is a document, a link to a website, or a video. For documents, there's a small "**PDF**" page icon, which you can click to display the file in a popup reader window, with Print and Download buttons. For a website, there's a "**page with arrow**" icon which opens the website in a new browser tab. If a video there's a small "**video camera**" icon which you can click to open the video in a media player window. Documents can be downloaded and saved to your PC, whereas videos are copy protected and cannot be downloaded.

If there's a quiz, you'll see the questions with the correct answers in green. Site managers will also see the questions and answers; however, trainees cannot view or access any of the above.

Assigning Training

Using the **Training** menu, click on **Assign Training**.

Select whether the training you are about to assign is Mandatory for everyone (default is Yes) and if there is a date by which users will need to complete the course by (Course Dates).

Next, select the training Subject type, and a list of courses in that subject will display. Click the checkboxes for the Courses you are about to assign. Click anywhere on the page to close the list. You can include additional Subjects and Courses if you wish, by clicking the "**Subject +"** button. When finished, click **Continue**.

Next, select which users will be assigned this training. Searching by name is the default, but you can also assign it to everyone in a particular Location or Department (if you have provided those). If searching by name, enter the first few letters of either a first name or a last name. Click the checkboxes next to the names of each person/location/department that will be assigned this training and click **Continue**.

Next, confirm the people who will be receiving this training, and click **Assign Training**. You will need to notify them that training has been assigned. The system does NOT notify users that training has been assigned to them. They will be able to view all assigned training on their home page when they log in.

Generating Training Reports

In the main menu, click the **Reports** menu and select the type of report you wish to view. A popup message will ask whether you want to open or save the report file. These reports show EVERYTHING in the database for your company, and you will need to filter out unwanted subjects, classes, dates, people or other data elements.

Alternatively, for a report on a specific training course, on the Home Page click on the name of the "tile" at the bottom representing the Subject you wish to view data for. For the course you wish to view data for, click the **View Details** link at the bottom.

You will see a Dashboard showing information about the overall use of that training course. Click the "**three dots**" symbol to the right of that and select **Download Data** from the menu.

A CSV-format report will be downloaded into your browser's "Downloads" folder. You can sort and edit data in Excel or whatever application you use for CSV formatted data.

Trainees are able to print Completion Certificates for each course successfully completed, if desired.

Creating Training Courses

As "Admin," you can create customized training courses that can be assigned to your employees only. Because of the number of steps involved, this is beyond the scope of this document. However, the main steps are:

- Name the course and provide a description.
- Determine what the score needs to be, to pass the quiz.
- Upload training content (PDF and MP3 audio & MP4 format video files. Alternatively, a hyperlink to an intranet or internet website can be used).
- Add a quiz if desired. Questions can be True/False, Multiple Choice, or Checkboxes.
- Specify how many quiz retakes are acceptable, and what constitutes a passing score.

- The course does not have to be published right away. It can be created then reviewed by others and finally published when it's ready. It can be Unpublished at any time and republished later if changes are needed.
- Any such training courses and their contents are private, and no other companies using RiskTool Advantage can see your customized training content.

Getting Help

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