

Take a Fresh Look at Your Site: Settings and Features

WHY REEVALUATE YOUR SITE?

Your organizational needs have likely evolved since implementing Relias. To make sure that your training strategy is still meeting your needs, consider revisiting your objectives, outcomes and branding.

- + Review your main organizational objectives and ensure that your training tools address the problems your leaders are trying to solve.
- + Review your use of training plans, modules types, and reporting to ensure you are reaching the desired outcomes.
- + Review custom training for consistency in organization language, branding (colors/logo inclusion), email templates and use of key features for a consistent learning experience.

☆ HELPFUL HINT

Relias recommends conducting a site review at minimum on an annual basis. As changes happen in both Relias functionality and within your organizational needs, it may be helpful to review these features more frequently.



Key Areas to Explore

HIERARCHY

Review the structure of your hierarchy levels to verify that Supervisors have accurate access to their staff.

Confirm that hierarchy names are consistent and correct for reporting.

Ensure users are assigned to their appropriate hierarchy level.

If appropriate, select the correct Supervisor as the Notifications Recipient within each hierarchy level

AUTO-ENROLLMENTS

Audit auto-enrollment profiles to make sure they are capturing the intended users. This includes the review of any recently added or updated user profile fields.

Reassess the use of the auto-unenrollment checkbox feature.

Review the profile fields selected as Required Fields to ensure that your user data will consistently include your selected attributes.

TRAINING PLANS

Establish a consistent naming convention of training plans.

Add last revision date into the training plan title or description field. Also, consider using the description field to track updates.

Review the modules within the training plan to ensure they are still relevant.

Review supporting resources like Relias Crosswalks/board websites to ensure that the appropriate modules for accreditation/approval needs are being assigned.

Ensure existing training plan settings such as acceptance and availability windows still reflect the current needs. Use training plan instructional guides or the Admin Support Webinar series on Connect for guidance.

Swap selected modules for newer releases or alternate modules to keep content fresh.

Consolidate training plans if they apply to the same group of people and reoccur with the same frequency.

Unapprove old training plans that are no longer applicable.

USER FIELDS AND PERMISSIONS

Review important profile fields such as job titles, departments and user locations for duplications and inconsistent naming conventions.

Assess if the custom fields can be helpful for identifying groups with shared training needs.

Review existing user permission(s) to determine if additional levels are needed or if any permissions should be removed.

Review use of the Additional Hierarchy Access option for any Supervisors who need a higher level of access.

REPORTS

Explore reporting suite to see if there are other reports that would better meet your organization's data needs.

Update any shared or scheduled reports to reflect newly added or changed user profile fields.

Review the date ranges used in saved reports and see if other dynamic date ranges would be a better fit.

Review the recipients of automated reports to ensure the correct recipients are listed.

Review your subject line and email body text in automated reports to reflect appropriate organization language.

Consider which reports are used most frequently by colleagues and set up a shared report.

SITE BRANDING

Another area to consider during your site revitalization is how your Relias site conveys your organization's brand. There are multiple tools available within the site to customize the user experience. These tools can be used to build and strengthen your brand internally. Explore the table below for ideas on how you can take advantage of these branding opportunities.

- + Import your logo into your portal to brand the learning panel appropriately.
- + Customize Email Templates to reflect appropriate company language. If desired, you can include your logo or link to additional company resources.
- + Craft Announcements to share company updates, promote highlighted content or even to share welcome messaging to new users.
- + Build custom courses using your organization's specific branding/style.
- + Add custom content/exams to Relias-owned courses to personalize content to meet the specific needs of your population.
- + Explore the Policy and Procedure Binders feature for policy management or an opportunity to share training resources.

CHECKLIST



EMAIL TEMPLATES



ANNOUNCEMENTS



CUSTOM COURSES

☆ HELPFUL HINT

Many organizations promote their learning portal as their own *learning institute*. The features above could be used for creating training resources for your team, welcome messaging for new hires or even building a staff development program.

Reach out to the [Relias Team](#) to discuss how to build a sustainable learning culture at your organization.