

## Cardinus PACE Basic Guidance for Administrators

Cardinus / PACE Health Working - online training and workstation self-assessment program

**If you are not a Cardinus Administrator, you will not have permission to access the administration area of the system.**

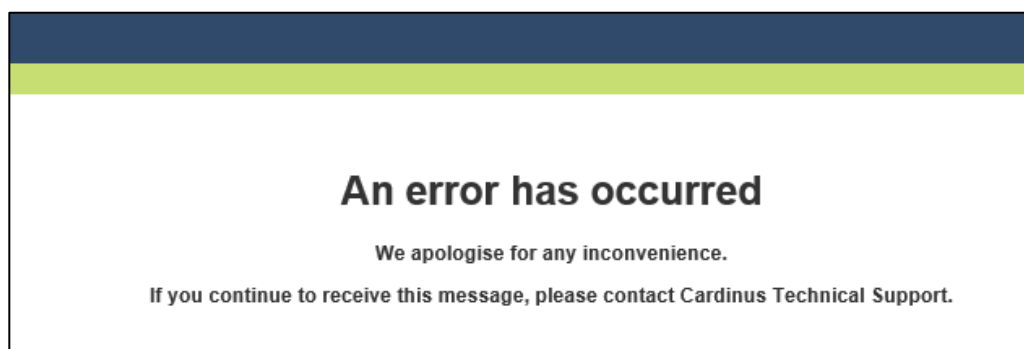
Use Chrome and the link provided by your service Health and Safety Adviser to access the administration area.

Your opening screen will look like this.

The screenshot shows a login interface with a light green background. At the top, the word "Login" is displayed in a large, bold, dark blue font. Below it, the text "User ID" is followed by a white input field. A green callout box with a blue border points to this field and contains the text "Enter your payroll number". Below the "User ID" field, the text "Password" is followed by another white input field. A green callout box with a blue border points to the "Set new password" link below the password field and contains the text "For your first-time login Click Set new password and follow the on-screen instruction." and "Your will be sent an email with a link to reset your password." The link "Set new password" is in blue text.

**Note;** the login details you create for the administration areas of PACE can be used when you receive your e-invitation to carryout your on-line training, profile assessment and workstation assessments.

If the following message appears do not contact Cardinus Technical Support, please contact or service Health and Safety Adviser for assistance or email;  
[HealthandSafety@westlothian.gov.uk](mailto:HealthandSafety@westlothian.gov.uk)



Your Health and Safety Adviser will send you an email with an embedded link to reset your password as per onscreen instructions and submit.

1. Your opening screen / Dashboard will look similar this;



Once you have created your new password, you will be able to access PACE. Your PACE home page may not look exactly like the one pictured above but the general features will be present:

- The PACE logo in the top left-hand corner acts as a link back to the home page from anywhere in PACE.
- The browser back button will take you back one level in any menu.
- Along the top of the screen are icons that link to the major PACE functions:
  - Training
  - Risk Manager
  - Case Manager
  - Users
  - Reporting
  - Email
  - Programmes
  - Administration

Clicking the icon will either take you directly to the function, or, where that area of PACE has more than one section, produce a drop-down menu of those different sections.

**NOTE – Depending on your permissions you may not see all of the above options; the full list assumes that you have access to all areas of PACE.**

## 2. User Menu

### 2.1 User Search

Clicking on the Users icon takes you to the Users List screen. From here you can search for specific Users (or groups of Users), amend User details and create new Users.

Unless you are looking to create a new User, you will generally start with a User search.

Most searches are based on the User's First name, Last name, User ID, Organisation, User Status or User Role (course user, master administrator, sub administrator etc).

When searching by First name, Last name or User ID the search setting is a "contains" search. That means that all records where the field you are searching contains the characters you entered in that order. So, if you search on "hris" in First name, it would return every user called "Chris", "Christopher", "Christian" or "Christine" but not a user called "Kris".

The search option, **Organisation**, is a little different. This is a "lookup" search, as indicated by the magnifying glass icon at the end of the field.

**Users**

First name:  Email:

Last name:  Telephone:

User ID:  User status:

Organisation:  User role:

Additional filtering [Show](#)

[Search](#) [Clear all filters](#)

Click Search to reveal list of Users in risk area(s) selected

## 2.2.1 Modify User records

Bulk action <span>+</span> Create new user							
<input type="checkbox"/>	User ID	User	Email	Parent Organisation	Organisation	Status	Added to system
<input type="checkbox"/>	0123456	Ex Ample	<a href="mailto:bob.stainton@westlothian.gov.uk">bob.stainton@westlothian.gov.uk</a>	Corp Health and Safety	Corporate Services	Active	05 Feb 2021
							<a href="#">Modify</a>

250 items per page. Items 1 to 1 of 1

Click Modify to reveal user details

## 2.2.2

From here you can modify / change / update a User's details

Please ensure Payroll numbers are used for a User's ID, do not use email addresses or combination of names.

**Account availability**

☒ Okay ☐ Locked [Unlock user account](#)

**Set user's status**

☒ Active ☐ Archived ☐ Suspended ☐ Long term absent

**Actions**

[Send email](#) [Set area of control](#)

**Related records**

- [Training](#)
- [Risk assessments](#)
- [Email History](#)

**Update history** [Show](#)

[Save](#)

The panel in the top right-hand corner offers further options for amending user details.

**Account Availability** signals whether the User is **Okay** or **Locked**. If "Locked" you can [Unlock user account](#).

**Set user's status.** The default is **Active**. Use **Archived** for users who have left the Organisation, **Suspended** to temporarily suspend the users account and **Long term absent** for users on long term leave.

[Show](#) / [Hide](#) **Update history** (pictured below).

**Update history** [Hide](#)

Created by: Master Admin

Created date: 05/03/2017

Modified by:

Modified date: 05/03/2017

[Save](#)

### 2.2.3 Set User's area of control - you may not have authorisation to do this.

## 3. Sending emails

### 3.1 Send an email to an individual User

Clicking the Send email link in the side panel opens the standard **Send an email** screen. Here you can either choose a pre-existing email from the Template drop-down list. Click Send when you are happy with your email. You can also use cc or bcc to copy in others.

You can also send an email by clicking on the User's email address in the course user list.

### 3.2 Sending an email to a small group of Active Users using Bulk Action

The screenshot shows a table of users with columns: Bulk action, User ID, User, Parent Organisation, Organisation, Status, Added to system, and a Modify link. A green callout box points to the 'Bulk action' dropdown menu, stating: "2. Click Bulk action and select **Send email** from the drop down". Another green callout box points to the selection checkboxes, stating: "1. A maximum of 49 users can be selected". The table shows several rows of users, all with 'Active' status. The bottom of the table has pagination controls showing "250 items per page" and "Items 1 to 6 of 6".

#### Send an email

Type your subject and message in the boxes below, or select a message template from the list.

The screenshot shows the 'Send an email' form. On the left, there are fields for 'To...', 'CC...', 'BCC...', and 'Template'. A green callout box points to the 'To...' field, stating: "Recipients names will appear here". Below these fields are 'Subject' and 'Email format' (HTML/Text) options. A note states: "Note: By selecting 'Text', please be aware that formatting will change and any images will not be displayed." There is an 'Attachments' section and a rich text editor with various formatting tools. On the right, there is a 'Message details' section with a 'Notes' field and a 'Send' button. A green callout box points to the 'Template' dropdown menu, stating: "Select template from dropdown options, allow to load before sending".

## 4. Creating a new User

4.1 To create a new User, you must at provide:

User ID – (this must be their full 7-digit payroll number)

- First name
- Last name
- Email Address
- Organisation (the location their work in)

The new User's status will default to Active and Course User.

When selection the location, click on the Service area below e.g. Corporate Services, Education, F&PM, Support Services, HCBS, Operational Services Social Policy, Planning and Economic Development.

This will ensure the correct location and details are shown in the correct manner on the User details.

- ▾ ED ADDIEWELL PRIMARY SCHOOL  
Education
- ▾ ED Adult Learning  
Education
- ▾ ED ARMADALE ACADEMY  
Education

This is how the new User's Organisation details should look like

The screenshot shows a form titled 'Organisation details' with a dropdown arrow. Below the title, there are three input fields: 'Organisation \*' with a blue 'Education' tag and a search icon, 'Line manager' with a search icon, and 'Line manager email'. To the right of these fields is a section titled 'Your selection' which contains a dropdown menu. A red arrow points from the text 'This is how the new User's Organisation details should look like' to the 'Your selection' dropdown. The dropdown menu is open, showing a tree structure: 'Organisation' (expanded) with a sub-item 'ED ARMADALE ACADEMY' which has a blue 'Education' tag.

## 5. Training and Assessment records

**5.1 The Training** section of PACE gives you visibility of your users' progress in relation to their eLearning. Access it by clicking on Training at the top of the screen. A training record is created as soon as a user begins their eLearning – users who have not begun their training do not have training records and therefore do not appear on this screen. Search for records using the fields at the top of the screen.

### Training

User	Parent organisation	Organisation	Programme	Date	Progress	Test result
Ex Ample	Corp Health and Safety	Corporate Services	Healthy Working	05 Feb 2021	Finished	100%

## 5.2 Viewing User Risk

Risk assessments can be accessed by the Risk Manager icon in the PACE menu bar.

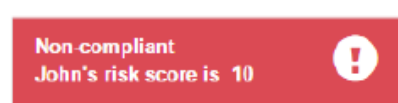
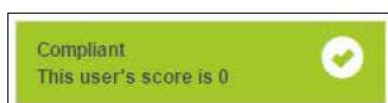
**Manage user risk**  
Manage unresolved risk for all users with active risk assessments.  
Start

**Assessments**  
View and modify all risk assessments.  
Start

Use this to see an individual User assessment records

Use this to see all Users assessment records for a location or group of locations. The most recent records will be at the top (see next page).

Training, assessment and email history can also be accessed via a User's account and will show whether they are compliant or non-compliant.



### 5.3 Viewing assessment records for a location or group of locations

User profile and workstation assessment records are shown. In the example below there are six Users in this location, 5 have completed both their profile and workstation assessments and 1 only completed their profile assessment. Therefore, workstation assessment required.

Bulk action

Create new assessment

<input type="checkbox"/>	User	Assessment name	Parent Organisation	Organisation	Programme	Date	Progress	Risk	Progression Status	
<input type="checkbox"/>	Ex Ample	Healthy Working	Corp Health and Safety	Corporate Services	Healthy Working	05 Feb 2021	Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>	Ex Ample	Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working	05 Feb 2021	Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working	Corp Health and Safety	Corporate Services	Healthy Working		Finished	6		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working	Corp Health and Safety	Corporate Services	Healthy Working		Finished	7		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>
<input type="checkbox"/>		Healthy Working - Profile	Corp Health and Safety	Corporate Services	Healthy Working		Finished	0		<a href="#">Modify</a>

250

items per page.

Items 1 to 11 of 11

### 5.4 Risk Classification

Risk is split into three sections, to access these click on the drill down icon on the left-hand side of the screen, adjacent to the type of risk:

**Unresolvable risk.** These are risks which have not been resolved despite all reasonable attempts to mitigate them. The risk continues to count towards the user's overall risk score. It is different from Unresolved risk in that no further actions are expected or required.

**Unresolved risk.** Risks which have not been resolved and further action can still be taken. Risk management focuses on unresolved risk and what can be done to mitigate them.

## 6. Reporting

### 6.1 Running standard reports

Click Reporting in the PACE toolbar to access the standard set of reports with which PACE comes pre-loaded. All reports have plain-language names and descriptions which make their purpose clear.



**Do not modify  
report templates**

Completion report

Click **Run** to run the reports for all users to which you have access. For example, if you want to run a report that shows everyone who is active on the system and what their current status is you would choose the **Completion report**.

Select your location or multiple locations

Select report format  
Html or Excel then  
click Run

Html report will provide an on-screen report only

Xcel report will download to the bottom left side of your screen and can be opened etc. from there.

## 7. Rules and Schedule

**7.1** PACE has the ability to send emails automatically to specific users based on defined criteria. Rules, together with Schedules, are what define that criterion. Email rules determine which users are to be included in the automatic emails; email schedules determine when those emails will be sent and also specify the content (i.e. the template to be used) for those emails. Schedules are discussed in depth in the following section.

**7.2** Select Email – Email Rules to access the Email rules home page. This lists all the rules to which you have access and provides links or buttons to perform one of three actions in relation to email rules:

- Create new rule
- Modify existing rule
- Delete existing rule

Please contact [HealthandSafety@westlothian.gov.uk](mailto:HealthandSafety@westlothian.gov.uk) for assistance should you need to create, modify or delete a rule

### Email rules

						<a href="#">+ Create new rule</a>	
Name	Description	In use	Type				
All users	All active users in the system.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		
Healthy Working Plan Chaser	Active users who have outstanding actions in the Healthy Working Plan. Users who have completed their assessment within the last two weeks have been excluded.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		
Healthy Working re-assessment	Active users who completed their Healthy Working assessment more than 1 year ago.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		
Healthy Working reminder	Active users who have not completed a Healthy Working risk assessment but have received either an invitation or a reminder. Users who have received emails within the last week have been excluded.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		
Healthy Working reminder 1	Active users who have been sent the Healthy Working invitation but have not completed the assessment. Users who have received the invitation within the last two weeks have been excluded. The rule also checks to make sure that the user has not already been sent Healthy Working reminder 1.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		
Healthy Working reminder 2	Active users who have been sent the Healthy Working reminder 1 but have not completed the assessment. Users who have received the invitation within the last two weeks have been excluded. The rule also checks to make sure that the user has not already been sent Healthy Working reminder 2.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		
Healthy Working reminder 3	Active users who have been sent the Healthy Working reminder 2 but have not completed the assessment. Users who have received the invitation within the last two weeks have been excluded. The rule also checks to make sure that the user has not already been sent Healthy Working reminder 3.	No	Standard	<a href="#">Modify</a>	<a href="#">Delete</a>		

## 7.3 Schedules

Email Schedules combine Email rules and Email templates so that emails can be sent automatically to users.

Please contact [HealthandSafety@westlothian.gov.uk](mailto:HealthandSafety@westlothian.gov.uk) for assistance should you need to create a Schedule.