

A close-up photograph of a smiling Black man wearing a yellow hard hat and safety glasses. He is holding a tablet computer and looking at it. The background is a blurred industrial setting with sparks flying, suggesting a factory or construction site. A large blue diagonal shape is overlaid on the bottom left of the image.

# Training Record Management System **Buyer's Guide**

Tools and information to help you  
make a better buying decision

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# Introduction

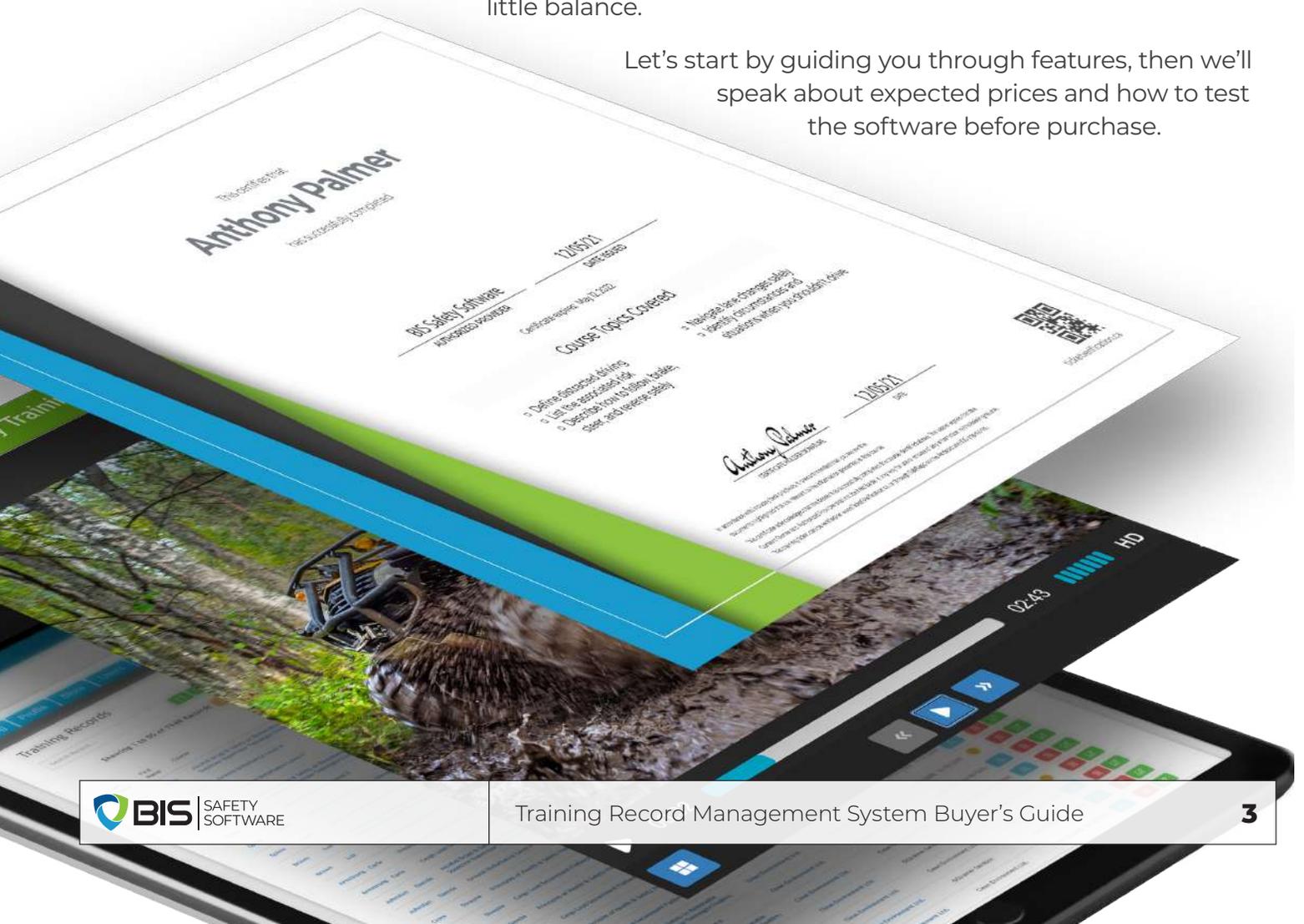
You have probably noticed Training Record Management software comes in many shapes and sizes. Some have integrated eLearning systems while others take this further with competency assessments. There are systems that are purpose-built for each company and others that can help many industries. Whichever your needs, it is important you understand all the potential solutions available in order to access all the benefits of a centralized training system.

Throughout our guide, you will learn about popular features along with important security measures. With this awareness, you will be able to make a knowledgeable choice.

It is fairly common for companies to take months and even up to a full year before choosing the right Training Record Management Software. However, we are hoping this information will help improve and expedite your final decision. Making the wrong choice can be costly but the sooner you choose a system the sooner you can access its perks. So it's important to ensure a little balance.

Let's start by guiding you through features, then we'll speak about expected prices and how to test the software before purchase.

This guide will help improve and expedite your buying process



# Features to Look for in a Training Record Management System



## Credential Uploader or Legacy Certification History

If you hope to upload nondigital training records, then you need a system that can upload image files of training certifications. A key feature in today's leading systems is the ability to upload image files of certifications. Simply take a picture of the document, certification, or credential you want to save, and upload it to the corresponding record on the user account. That way you can provide accurate documentation to anyone who requires proof of your staff's compliance.

## QR Code Credential Access and Verification

If you want to supply auditors with you or your staff's credentials in seconds, then a system with a QR code scanner is the way to go. QR codes speed up the process and mitigate forgery. They can easily be scanned to verify personnel's credentials as opposed to previous methods—fishing multiple cards out of a certificate wallet or in some cases workers actually carry around binders.

These codes can be printed off and used on ID tags minimizing the use of phones and other devices. In high-security areas, your employees may be denied access to personal cell phones, making a QR-coded name tag even more practical.



## Training Records/Credential Storage

While shopping for Training Record Management software you should focus your search on systems that can centralize all your training credentials in one accessible location. Centralized systems guarantee everyone accessing the system sees the same updated information but how they do this is even more important.

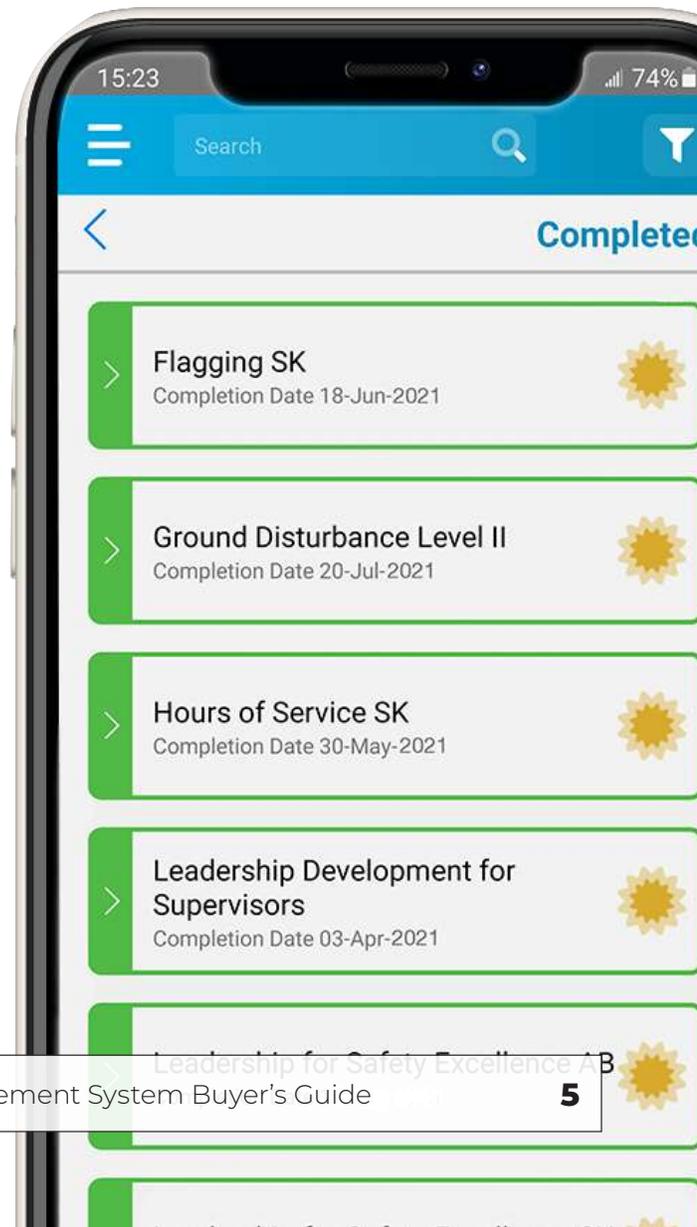
Cloud-based SaaS (Software as a Service) solutions for example are always updated with the latest features, they can grow with your storage needs, and it's important to seek something with high availability and integrated backup systems. Ask for their documentation on their backups and set up for high availability.

Furthermore, Training Record Management software that can help you quickly access the training records will provide better value in the long run. For instance, an ability to sort by location/user/or job type is a feature that can help in this process and should be valued. With these features, you can quickly see how many people need First Aid training or how many people will be due for renewal in the next 6 months. Furthermore, you should inquire as to whether you need your employees to access this information or just your admins. Don't worry about other features until you have determined the products you're looking at suit your basic needs.

Here's a list of key considerations. If you're unsure as to what they are we explain all these further in the guide. This is just meant to give you a good overhead before you proceed.

### Key Credential Storage Considerations

- Is it easy to access? Do they have an app for most phones and offline access to training records?
- Is there an ability to see what's about to expire?
- Is the security adequate? Do they have backups or disaster recovery plans? (don't assume)
- Is it easy to upload user profiles/training record data/certificates of completion?
- Does it include a gap analysis of what workers are missing by location/role/job type?
- What levels of reporting access and administrative access does the system have?





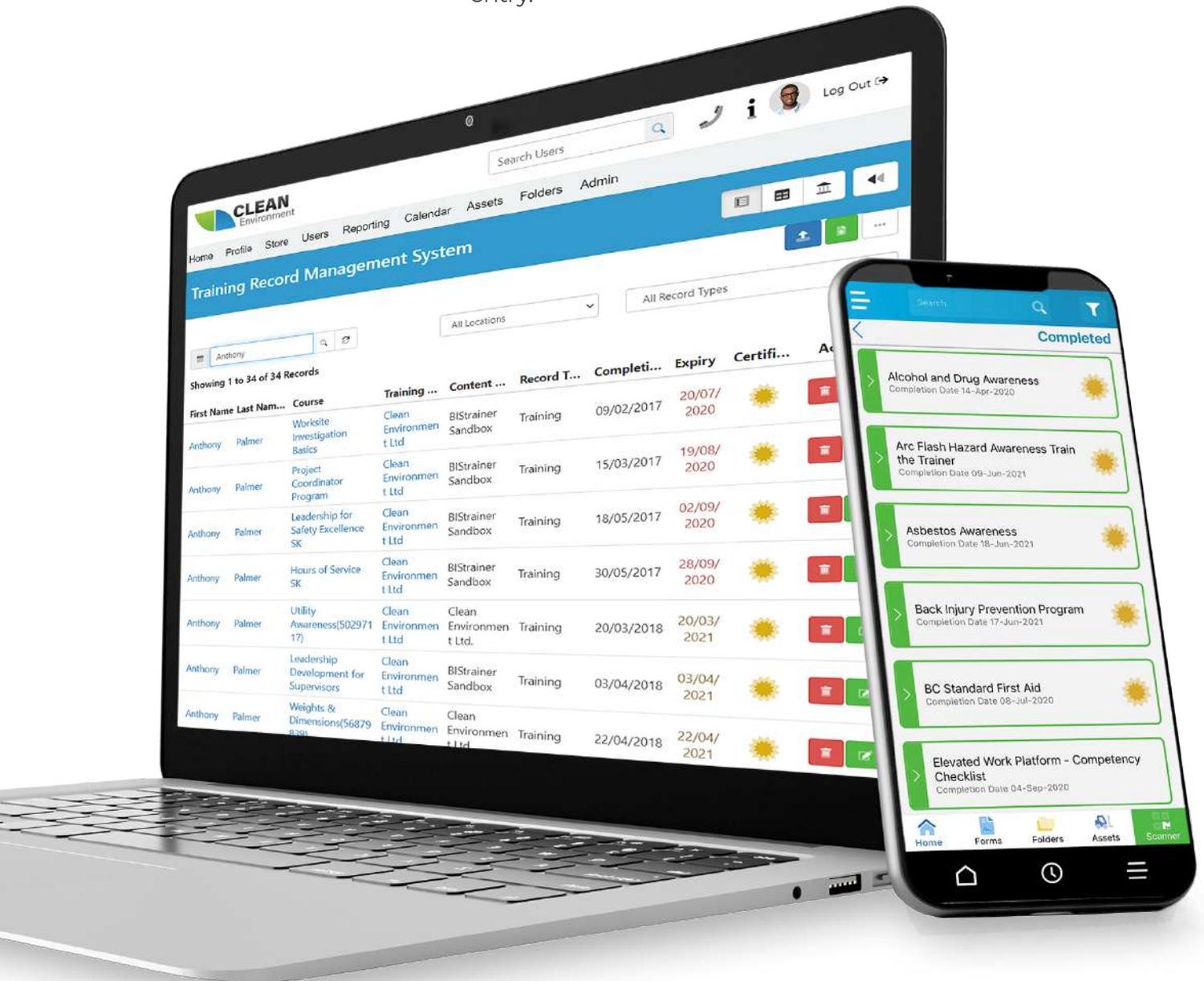


Your team may need remote, 24/7 access to their records

## Mobile-Friendly Software

The world seems to be going mobile, therefore strong Mobile functionality should be on your checklist. Mobile functionality is an excellent feature that is not offered on all systems. Whether your employees are using a Desktop, Android phone, or iPad, they need access to their credentials while on the go.

Naturally, software that has mobile functionality has greater uses, mobile functionality is an important part of any system, make sure it's included in the software you select. Mobile functionality is especially useful in intrinsically safe environments in the energy sector, where an intrinsically safe mobile device is shared for data entry.



# Advanced Software Features

## Training Record Management

### Offline Functionality



If you frequent remote areas, then you should prioritize Offline functionality. Offline functionality is the ability to access your system without an internet connection. Offline functionality is slowly becoming more commonplace but can still be rare in legacy systems. Generally, it requires a mobile app and that's why fewer systems offer it. Some systems have begun adding offline functionality to allow users to view credentials offline, provided you've viewed/downloaded them on that device prior to losing connection. This is incredibly useful for remote contractors operating in areas without an internet connection.

### Microsoft Excel Upload Features



Are you logging employee training data and certificates using Excel files? Good! If you choose a system with Excel upload functionality, then your initial data migration will be much easier. Excel functionality makes the switch easy, when combining Training Record Management software with Excel you can create or update user accounts and download training reports in many desired formats. In other words, the software does much of your data entry and administration work.

Hours of data entry you've already put into excel sheets can be delegated to your system's excel upload feature.

### Training Matrix or Rubric



Consider a training matrix to simplify compliance. An advanced Training Record Management system will often include a Training Matrix that effectively relays training requirements per job title or location. Your training matrix will tell new employees and HR what is required for each role and some can auto-assign courses and training where it finds gaps in the requirements. They should be customizable to your organization and scalable. See additional details on this topic below.



## Seamless Learning Management System Integration

If you are in an industry that requires multiple courses per employee then realizing you're missing training is half the battle. Some systems can be coupled with Learning Management Systems. That way your employees can train on demand.

With Learning Management System (LMS) integration, your Training Record Management software automatically logs completed courses and offers any new courses your staff requires. Choosing compatible software, or a system that has it all under one roof will also mitigate any compatibility issues you could run into mixing applications. Therefore, choosing a system from a company that also offers an LMS automates more if not the whole training process.

If you're unsure if a company has Learning Management System integration you should ask a representative. Sometimes companies sell courses, but their programs and software do not integrate with each other. This creates more administrative work in the long run.

## Application Syncing (APIs and SSOs)

Chances are you already are using software in your company. So, choosing software that can interact with your current systems would be extremely beneficial.

That's what an API (Application Programming Interface) is designed to achieve. An API can be considered any part of a system that helps it harmonize with other apps, this includes tools, protocols, and code. A good API facilitates applications' communication with each other. It's a universal framework or intermediary code used to harmonize software so it can be used and recognized by both programs, allowing them to share data.

More often than not a company will advertise which programs their system and API can work with. For instance, some systems can import contacts directly from the ADP, Ultipro, or Paycom payroll services. You can also set up Single Sign-On (SSO) allowing your employees to be added to the system with the click of a button. Better still, the payroll system can sync contacts so that any employee or contractor on your payroll can be updated automatically.





## Custom Branding

Your company branding and image are important, and brand consistency helps depict that you are an established and organized company to clients and external stakeholders. Those are some of the reasons you should consider a system that has custom branding abilities.

Using custom branding is another step towards looking professional and helping prevent confusion among your staff using the system. Luckily you don't have to design your own software to have your branding. However, there aren't many systems that offer custom branding, so if this is something that interests you then you should seek out the ones that allow for custom branding.



## Security

Redundancies, encryption, and closed systems are just a few of the words you'll hear when shopping for Training Record Management systems. However, whether you need to know the details of each feature depends on your industry. Below are quick definitions of these security systems and how they pertain to a Training Record Management system. If you require more detail, see the following section for more information on each security feature:

- Closed Systems: Your system is considered more secure than an open system due to compartmentalized access.
- Privacy-Encryption: Your employees' private information is protected via encryption. This ensures that only verified users can access sensitive information like sin cards.
- Redundancies: Your data is backed up in more than one location so that one issue cannot affect all your data.



## Privacy-Encryption

When storing your team's data, encryption helps add another level of privacy. Encryption can hide sensitive information like social insurance numbers under a different set of digits. This ensures that only verified users with a high level of clearance have access to private information.



## Closed Cloud-Based Software Systems

Training Record Management software often uses cloud storage and when using cloud storage, you should make sure your software is a “Closed System”. Closed systems are often preferred by legislators and authorities. A closed system regarding computing refers to a system that cannot be accessed or tampered with by people other than those granted access by the system admins.

An open system is something that can be accessed by people without prior approval. This leaves open systems vulnerable to a variety of cyber-attacks and hackers.

Therefore, closed systems are considered much more secure and controlled. If you see the word closed system, you’ll know it’s referring to a system that is more secure by design. Thus, it has much more legitimacy in the eyes of most governing bodies, they know it cannot be easily tampered with by other users.

## Redundancies

Redundancies guarantee your data will never be lost, they do this through backups and multiple storage locations. Companies often hire third-party servers to operate their cloud applications, in doing so they are given more choices/locations as to where to store your data.

Redundancies are fairly common in large systems, but if you’re unsure you should ask the company directly what redundancies they implement.

## Cryptographic Key Management Practice

Cloud-based web applications use the internet to function and naturally should adhere to new security protocols. A cryptographic key management system does exactly that and adheres to the new standards and is therefore much harder to hack or infiltrate. If you are unsure whether the software you are testing adheres, look to see if there is a lock icon in the web browser. If the system is “secure”, it will display a lock icon at the beginning of the address bar.



# TRMS Feature Comparison Chart

The chart below depicts the features we just discussed and correlates them to the corresponding package levels. Your standard package will allow you to save credentials and view them on a whim, however, the advanced and premium features can automate even more of your training requirements and are certainly worth consideration.

	Standard	Advanced	Premium
Training Record Storage	✓	✓	✓
Bulk Record Uploader	✓	✓	✓
Administrator Access	✓	✓	✓
On-Demand Reporting	✓	✓	✓
Automated Expiry Notification		✓	✓
Cloud Security Essentials		✓	✓
Scheduled Excel Reports		✓	✓
Training Record/Certificate Image Capture		✓	✓
Auto-Archiving of Older Records and Certificates		✓	✓
Role Defined User Access		✓	✓
Mobile Functionality			✓
Dashboard Reporting			✓
Training Matrix			✓
Gap Analysis and Trend Data			✓
Digital Certificate Wallet			✓
Offline Functionality			✓
Custom Branding			✓
QR Code Record Verification			✓
Automated Exception Analysis – Duplicate Purging			✓
End User Record Upload			✓
Remote Record Approval			✓
Learning Management System Integration			✓
Public Training Record Search Queries			✓

# Training Record Management System + Training Matrix

Automate all of your company training assignments

A training matrix is a software program that can auto-assign the exact credentials an employee requires for each company role, location, and client. The BIStainer training matrix, for instance, can even assign training topics or online courses as a part of a certificate program where the corresponding course is only assigned once the pre-requisite is completed. By using a training matrix, your administration can quickly and even automatically guide the rest of your staff through its required training. It is completely customizable and can be searched by location so you can stay up to date with regional compliance. Searching by role is another way to simplify things for the everyday user. The matrix makes it easy to stay up to date with your immediate company training requirements and can even verify with your Training

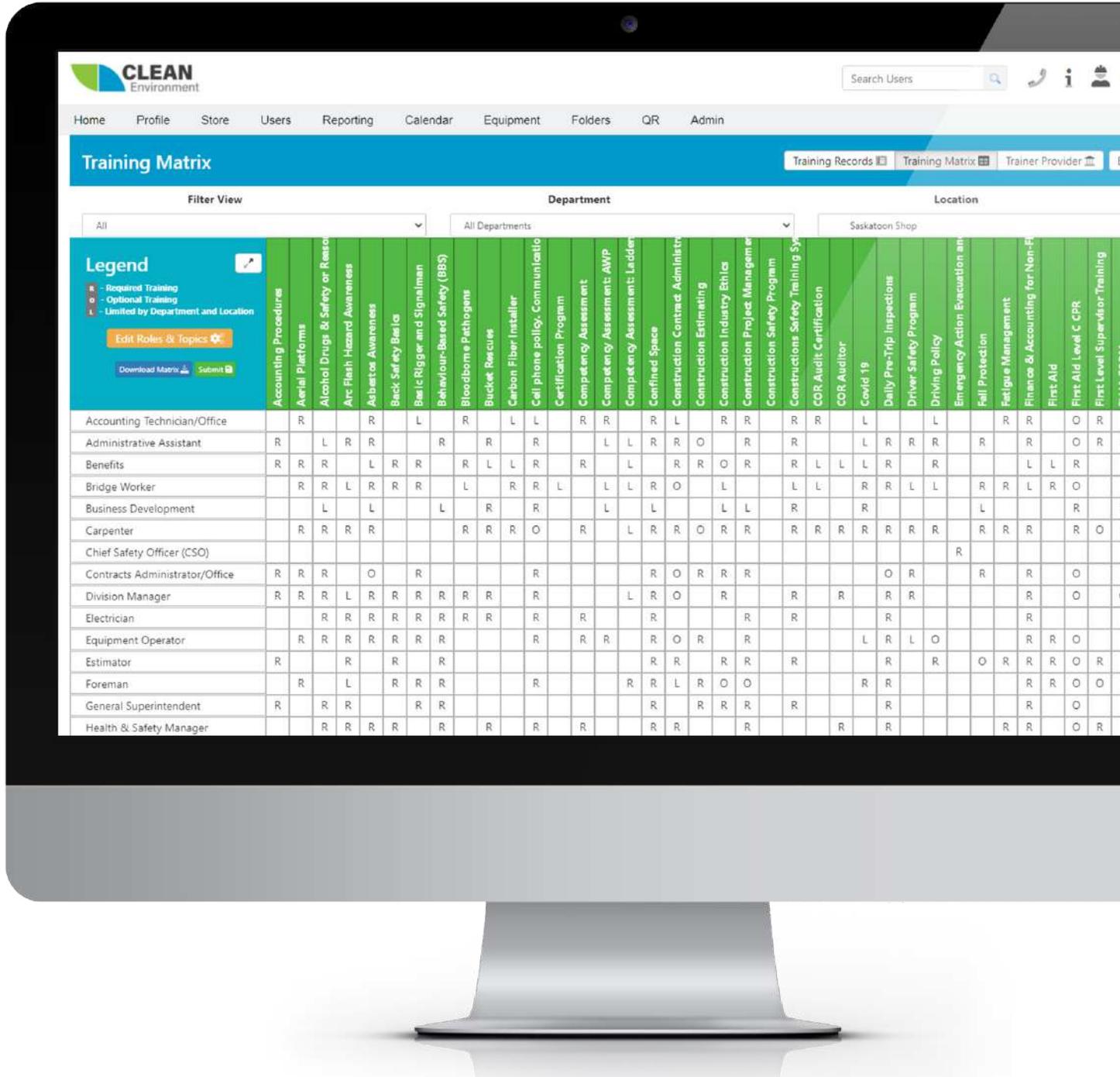
**Requirement Satisfied** **About to Expire** **Requirement Not Satisfied** **Grace Period** Optional requirements appear with the same coloured fonts instead of coloured cells.

Courses	Users	Location	Accounting Procedures	Aerial Platforms	Alcohol Drugs & Safety or R...	...
			Completed	Expiry	Completed	Expiry
	Anthony Palmer	Detroit South			05/06/2019	05/12/2021
	Casey Ray	Detroit South	05/06/2019	05/06/2021	05/06/2019	05/06/2019
	Christopher Underwood	Detroit South			01/03/2021	01/03/2021
	Garry Quinn	Detroit South	04/03/2021	04/03/2022	04/03/2006	04/03/2006
	Jamie Owens	Detroit South	05/06/2019	05/06/2019	05/06/2019	05/06/2019
	Jasmine Woods	Detroit South			05/06/2019	05/06/2021
	Joanne Bishop	Detroit South			05/06/2019	05/06/2019
	Jody Hansen	Detroit South	01/03/2021	01/03/2021	01/03/2021	01/03/2021

Record Management system which credentials have been completed either through an external training provider or through training completed through a previous role or employer.

For new hires, a training matrix will automatically alert them as to the required learning material. This takes care of huge responsibility in the onboarding process.

Essentially, a training matrix can track company-wide training compliance. It incorporates automated functionality you won't find in a spreadsheet. Looking for a Training Record Management system that contains a Training Matrix is a good bet to save your administrators even more guesswork and can save an incredible amount of time.



# Narrowing it Down

## Reviewing Your Choices

### STEP 1

### Comparing Features and Needs

Your first step in creating a shortlist should be compiling a list of features you feel you require and others that will decrease workloads. If you are unsure about what you'll need, we've compiled an "Industry-Specific Features and Needs" section below that should help you focus your requirements

### STEP 2

### Integration

Some businesses have all their credential data in excel documents, others in other software. The way you handled credential storage in the past needs to be ported to the new system. System demos and other testing are fantastic ways to familiarize your employees with the new system and gain feedback. Use staff feedback in conjunction with known integration facts you've discovered with the software to narrow down your choices.

### STEP 3

### Security

Security is a large factor for online systems. Secure cloud storage, compartmentalized access, and audit trails are just some of the security features you should look for if you're in an industry that requires heavy virtual security. Make a list of all the essential security requirements for your business and use this to shorten your list further.



#### STEP 4

## References

Testimonials are a great way to get a client's perspective on a product. A lack of testimonials should give you cause for concern. Reviewing testimonials and reviews will give you great insight. However, try not to solely rely on these because they can be misleading. Don't accept one review as a fact but rather, review them all and decide based on the average opinion.

#### STEP 5

## Free Trial or Demo

We mention this at the end because you don't want to spend time trialing ten products before you find the right one. Make sure you have a small list before you go this route to minimize excessive testing.

Most companies offer a free demo and possibly a free trial, and this is often the best time to test compatibility issues with your old system.

Systems that offer flexibility are going to be the clear winners here, but the trial will also give your administrators a voice in the decision. Make sure to allow your staff who will be using the software daily to try it. They will ultimately be the ones using the software.





# Industry-Specific Features and Needs

If you are unsure of your unique needs review the following section, below are features that are often favored by major industries.

## Construction

The construction industry requires tons of training, so naturally, an LMS integrated system is the best choice. This can deliver quick and thorough training for companies with many different contractors fulfilling diverse tasks. Plus, the ability to quickly supply security guards and authorities with your specialists' credentials via QR codes is another feature favored by our construction clients. Our contracting patrons also find a training matrix especially useful when reviewing compliance for their contractors.

### Construction Essentials

- LMS Integration
- QR Code Scanner
- Training Matrix



## Energy

If you're working in the energy sector, then security is often a large concern. Most powerplants and refineries require heavy scrutiny. Therefore, having credential storage with a secure cloud, scannable QR tags, and the ability to quickly satisfy security should be your main concern. Companies with fast consistent credential verification will be favored over the ones that don't. Some energy companies also favor companies with competency assessments. So, if your people work in nuclear power or combustible fuels, you should consider a system with competency assessments and anything that will make you look like a safer bet than your competing contractors.

### Energy Essentials

- Security
- QR Code Scanner
- Competency Assessment



## Transportation

The transportation industry can be split. Those who own and operate large fleets utilize asset, equipment, and fleet management tools. So equipment management software that integrates with their Training Record Management system is a huge time saver. Not only can they assign drivers to roles, locations, and vehicles but they will be able to see-through the program-if the driver has the necessary credentials to perform the tasks.

On the other hand, a company that has a small fleet and fewer drivers typically require cheap eLearning or access to courses and renewals. So an LMS integration plus the paper credential scanner/uploader are typically focal points for these companies to assist them in compliance and safety.

### Transportation Essentials

- Legacy or Paper Credential Uploader
- Quick Access to Courses
- Integrated Equipment Management Software for Large Fleets



## Healthcare

The medical industry is in constant flux. Training and retraining is the norm. In this sector, our clients often favor the ability to use a learning management system seamlessly with their TMS. That way any new training required, or expired training can be solved that day and with little to no hassles like switching accounts, contacting different companies, and physically chasing staff to alert them of courses they are missing.

Security is also an issue for many hospitals. Therefore, things like secure clouds and QR nametags are favored just like the energy sector.

### Healthcare Essentials

- LMS Integration
- Security

### Base Training Record Management System (TRMS):

**Low: \$1 /user**  
+ Minimum Monthly Fee **\$200**  
**High: \$50 /user**  
+ Minimum Monthly Fee **\$1,000**

### TRMS + Secure Cloud Storage:

**Low: \$1 /user**  
+ Minimum Monthly Fee **\$350**  
**High: \$50 /user**  
+ Minimum Monthly Fee **\$1,000**

### TRMS + Secure Cloud Storage + Customer Support + Training Matrix:

**Low: \$2 /user**  
+ Minimum Monthly Fee **\$350**  
**High: \$50 /user**  
+ Minimum Monthly Fee **\$1,000**

### TRMS + Secure Cloud Storage + Customer Support + Training Matrix + Learning Management System (LMS):

**Low: \$3 /user**  
+ Minimum Monthly Fee **\$350**  
**High: \$80 /user**  
+ Minimum Monthly Fee **\$1,000**

### TRMS + Secure Cloud Storage + Customer Support + Training Matrix + LMS + Course Subscription:

**Low: \$6 /user**  
+ Minimum Monthly Fee **\$350**  
**High: \$100 /user**  
+ Minimum Monthly Fee **\$1,000**

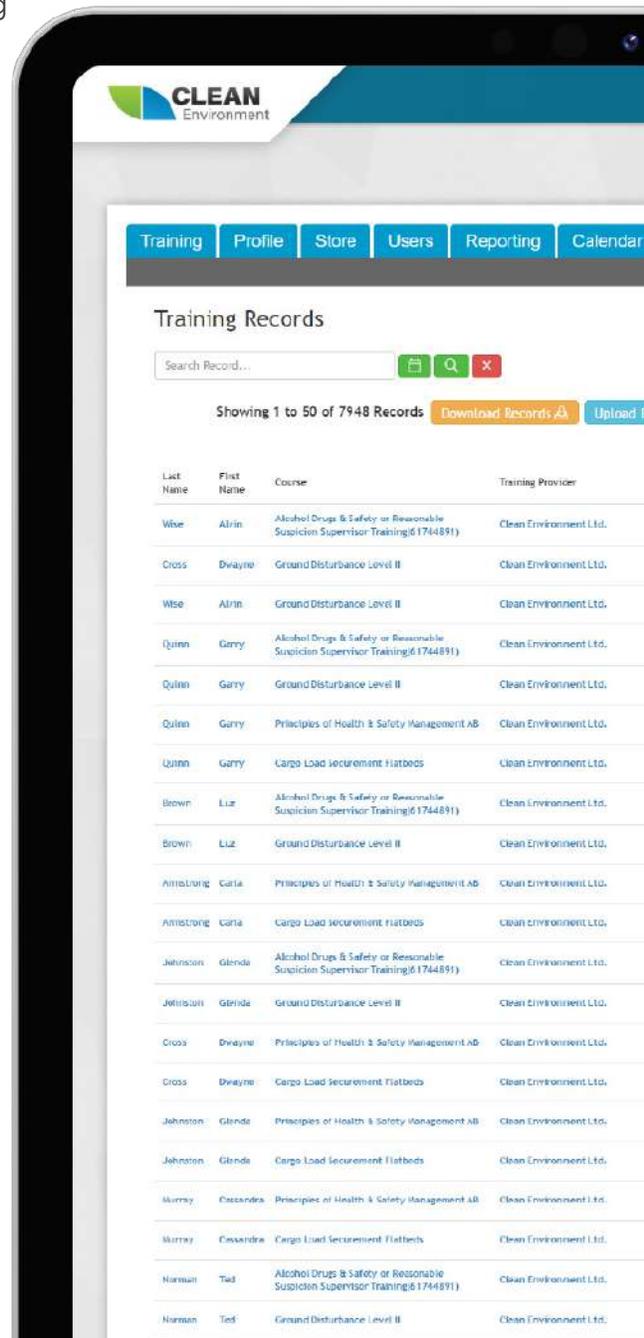
# Pricing

## What to Expect While Pricing Training Record Management System

When pricing a system, you must factor in software or features you will want to use. For instance, some companies offer a free training matrix with your system while others charge per month. So, the best way for us to help you through the process is to give you a rough idea of general pricing so you can compare products with a good understanding of what to expect.

Most Training Record Management software has a minimum monthly fee, plus user numbers and features increase the final price. The following are the monthly prices—both lower and higher—we've gathered in our research.

Advanced features like Learning Management System integration help to fulfill the goal of a Training Record Management system. When you opt for features like these and couple them with course packages your online training requirements are essentially automated. If you are in an industry that requires constant compliance, these features will save you thousands of dollars.



# Other Costs to Consider



It's important to consider hidden costs of a record management system

Other factors worth considering are the costs that come with implementation, customer service, and other services you'll require to get the most out of your system. When reviewing your choices, it's always good practice to consider the costs we have listed below so you don't end up paying more than you anticipated.

## Onboarding fees

Most Training Record Management Software has a start-up fee which they refer to as the "onboarding fee". It covers much of the initial work the provider does on the behalf of a new member. Be aware this could cost you more, so ask and consider onboarding before deciding.

## Migration Training

Migration training refers to the initial help you receive in the first weeks of implementing the system. Naturally, the more training you and your staff get the better you can use this software in the future. So, check if customer support is at least included in the onboarding process, some companies will offer free customer service for 2 weeks while others offer different onboarding packages, some of which cover your customer service forever. However, almost all companies consider migration training more than your usual customer service so make sure to question what their initial customer service supports and if migration training is possible. Always assume you'll require more training than you think that way all your employees will be trained regardless of their technical abilities.

## Ongoing Support

Customer service is crucial when it comes to a Training Record Management system. Companies that offer unrestricted support at no extra cost enable your employees to call them whenever there are issues. This is especially useful later when you hire new employees who need to learn the system. Whereas a company that charges for support could force you to train all your new employees, pulling staff from other tasks.

**Note:** Make sure to ask if it's "live" customer service or just email customer service. Email service albeit still useful is much slower than live telephone customer service. Your company could benefit from a software system that offers free live service.

Typical onboarding costs range between 0-20,000 dollars. Naturally, the more expensive packages offer much more than your usual customer service experience. This includes migration services as we mentioned above that help your company switch all your data to the new system. So, when pricing out your system, consider the initial migration fees and even your day-to-day ongoing customer service if required.

## Summary

A Training Record Management Software system is a major step into the future of employee training. The system can automate and streamline roles so your employees can reduce admin work and focus on other high-value tasks. Your Training Record Management system should save you time, money, and administration duties.

Choosing the right software can take time and your team's opinions should be accounted for. Consider testing the system before you purchase. Better yet, rigorously test all the features you're planning to use. Sure, the testing can be a bit time-consuming but afterward, new, and current employee training will scarcely be an issue. Your Human Resources department should now have more time to scout new staff and a unified system will give you a clear up-to-date picture of your team's training and abilities.

