PECB

A MANUAL ON HOW TO MANAGE PECB TRAINING EVENTS

We have been working on easing and improving our processes by developing digital modules based on our customer`s needs and feedback. The updated system will increase the ease and effectiveness of accessing the information you need in one place. This manual has been drafted to help you understand the digital PECB Training Event Management processes from different perspectives.

www.pecb.com

INTRODUCTION

In a dynamic world where technology is making everyone's operations easier, it is essential for PECB processes to also evolve into a digitalized and automated system. We have been working on easing and improving our processes by developing digital modules based on our Partner's needs and feedback. The improved system will allow you to access the information you need in one place, track your activity and performance, organize training courses, have access to our course materials, and stay updated with everything going on at PECB.

In addition to enhancing our processes, we have upgraded our **KATE** application to provide you with a better experience. By using KATE, your students will be able to access our course materials faster from any mobile device. Still prefer printed copies? No problem, we have increased the quality of the downloadable files, so they can be printed in perfect resolution.

Another very advanced application is our online examination application, the PECB Exams application. This application is one of the first accredited online examination applications that will enable candidates from all over the world to take exams online, as long as they have a working computer, internet connection, and an web camera. This application supports both essay-type and multiple-choice exams and helps to increase efficiency, satisfaction, and decrease costs associated to the training events.

Every major change has significant business impacts, thus, we have provided detailed instructions through manuals, video tutorials, and one-on-one support to make your transition easier. In addition, the new process explained below will soon be the only trusted method in organizing PECB courses. As several steps within the new process are obligatory, we highly encourage you to go thoroughly through each step.

We truly believe in a continual improvement culture which we implement in every project and service to be delivered to our clients. We need your help and cooperation in order for our ecosystem to function properly and have our processes streamlined and digitalized, contributing thus to a greater efficiency.

This manual has been dedicated to all PECB Partners and Trainers to help you understand the digital PECB Training Event Management processes from different perspectives, including the perspective of an end customer. After reading this manual, we recommend that you login to your Partner Dashboard to test some of the features, so when we organize the live webinar, you can ask any questions you may have.

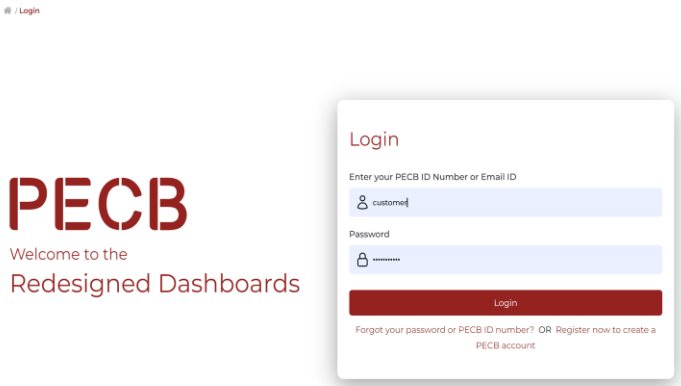
Thank you for your understanding.
PECB Team

The following scheme illustrates the process of Training Event Management, including the steps to be carried out from beginning to end alongside the actors responsible for executing each step. All steps depicted below should follow a consecutive order, requiring as such each preceding task to conclude in order for the successive one to initiate.

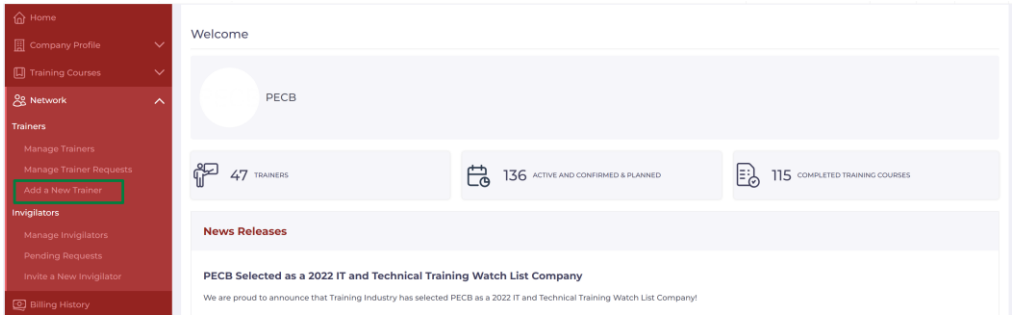
	PECB PARTNER		PECB TRAINER		END-CLIENT
01	Submit the Training Partner Request				
		02	Accept/Decline the Training Partner Request and Remove partner association		
03	Publish Training Event				
04	Enroll a client in a private training event / Send Activation Link			04	Enroll in the Public Training Event
05	Confirm Presence and Assign and/or Print Course Materials				
06	Complete/Submit Course				
	PECB Course takes place				
				07	Submit the Course Evaluation form to get the Attendance Record
				09	Take the Exam online: Schedule an Exam Session
				10	Take the Exam online: Sit for the Exam Remotely
11	View Participant's Exam Results				
				12	Apply for the PECB Certificate

In order for a PECB Partner to add a training session on their Partner Dashboard, they have to be associated with a PECB Certified Trainer first. To do so, please follow the steps presented below.

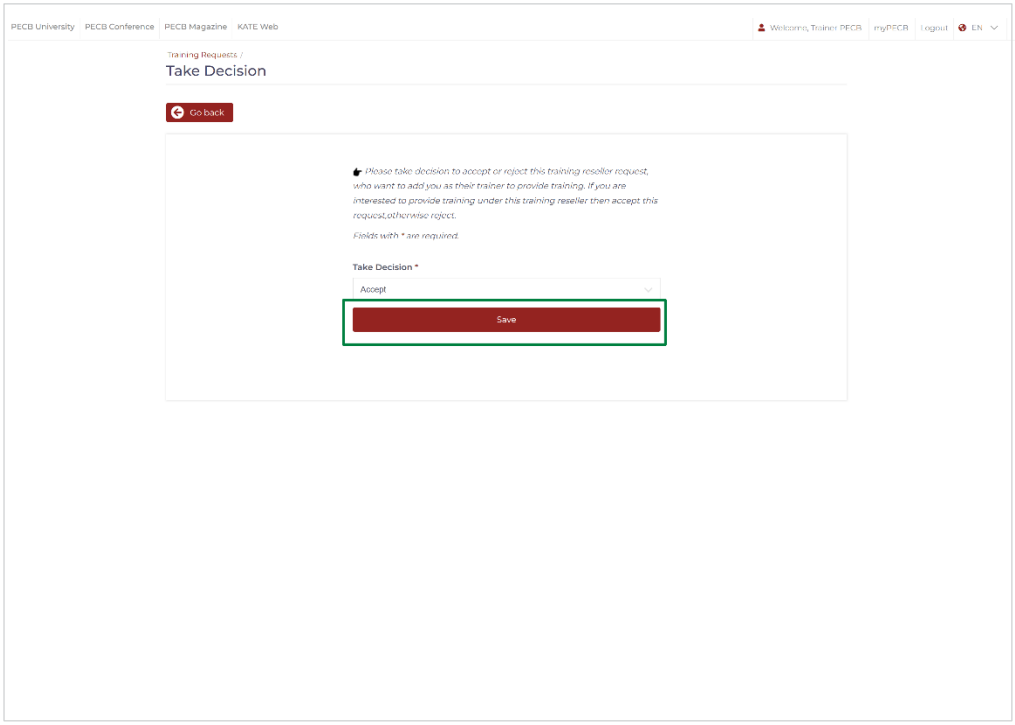
1. Login with your PECB Partner Credentials;



2. Click the Network tab, and go to the Add a New Trainer tab;



3. Select a Trainer and click the Submit button;

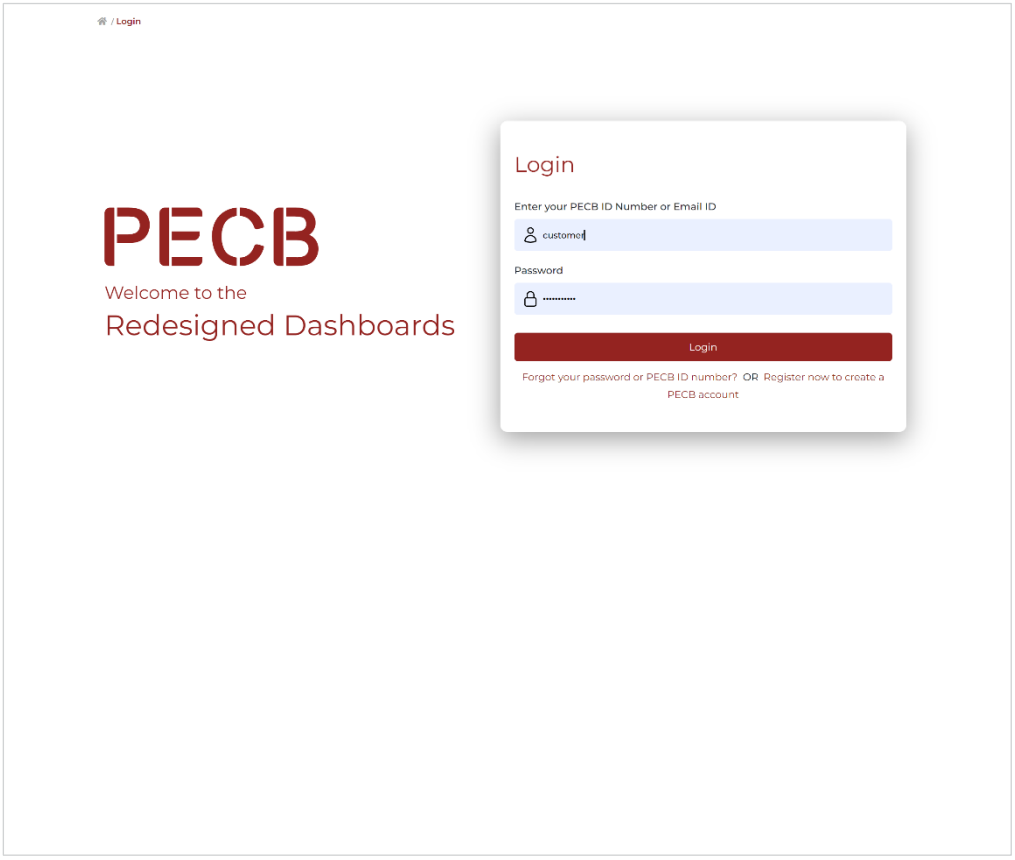


By submitting the request, the Trainer will receive a notification from the PECB System to either accept or decline the request. If the request is declined, the PECB Partner can resubmit the request.

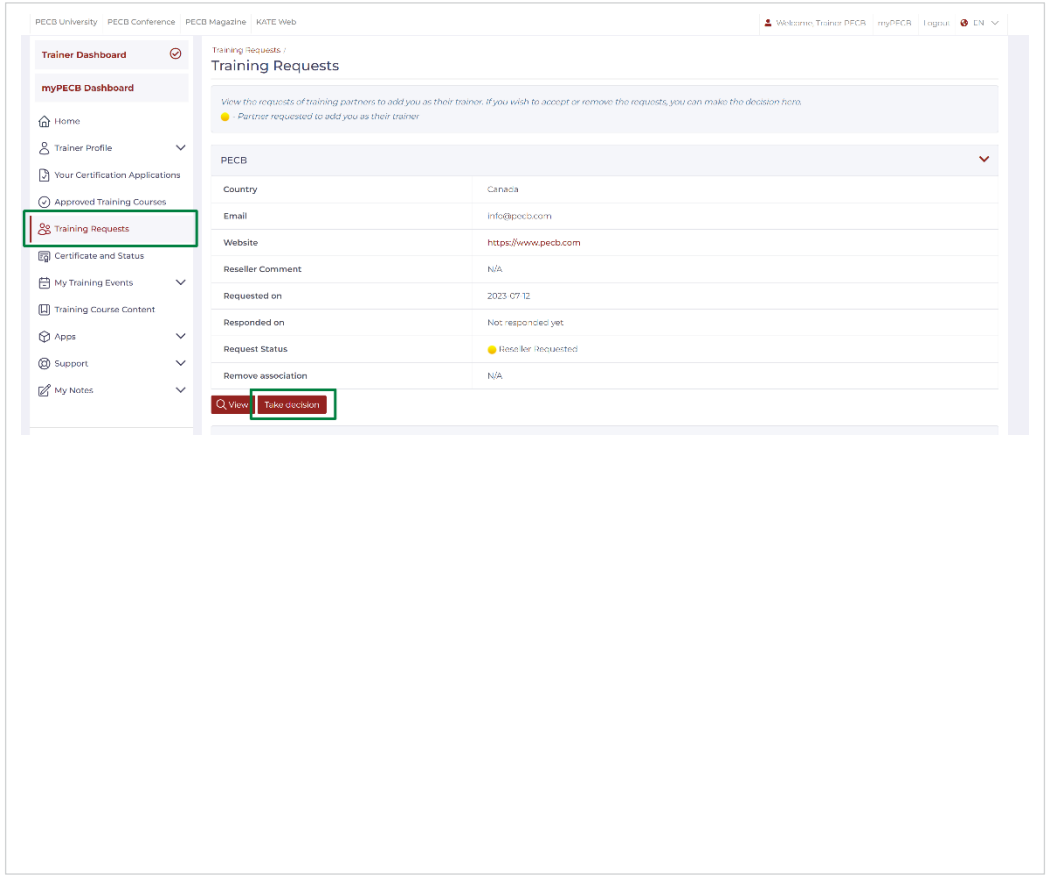
After the initial association, the Partner can publish multiple Training Events with the associated Trainer.

To continue the process the Trainer must accept the invitation from the Partner. To do so, the Trainer should accept/decline the invitation through their Trainer Dashboard as shown below.

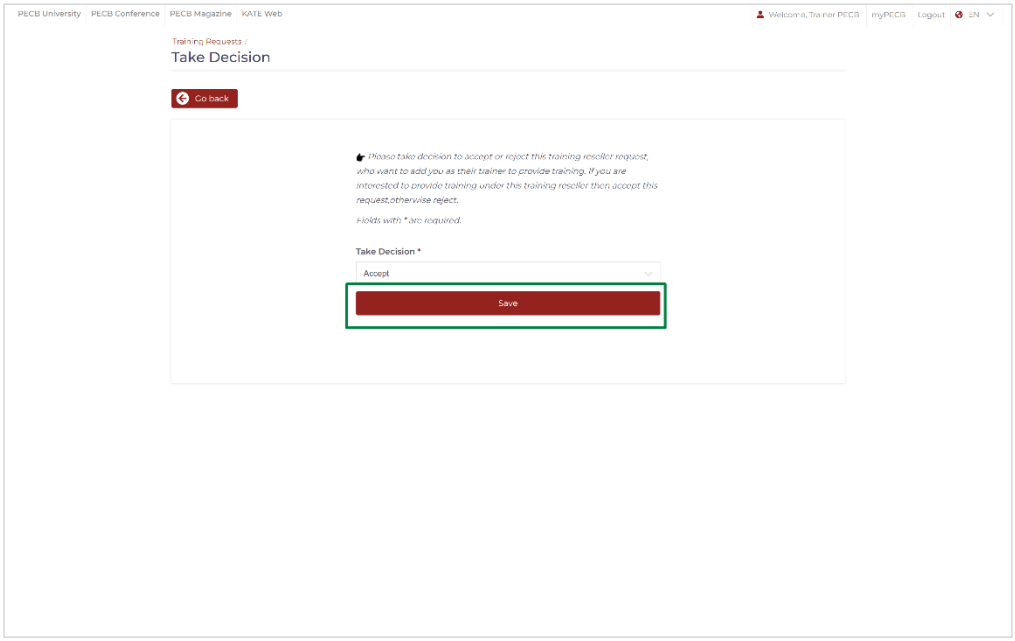
1. Login with your PECB Trainer Credentials;



2. Go to the Training Requests tab, and at the Partner click the Take a decision button;



3. Accept/Decline the request and click the Save button;

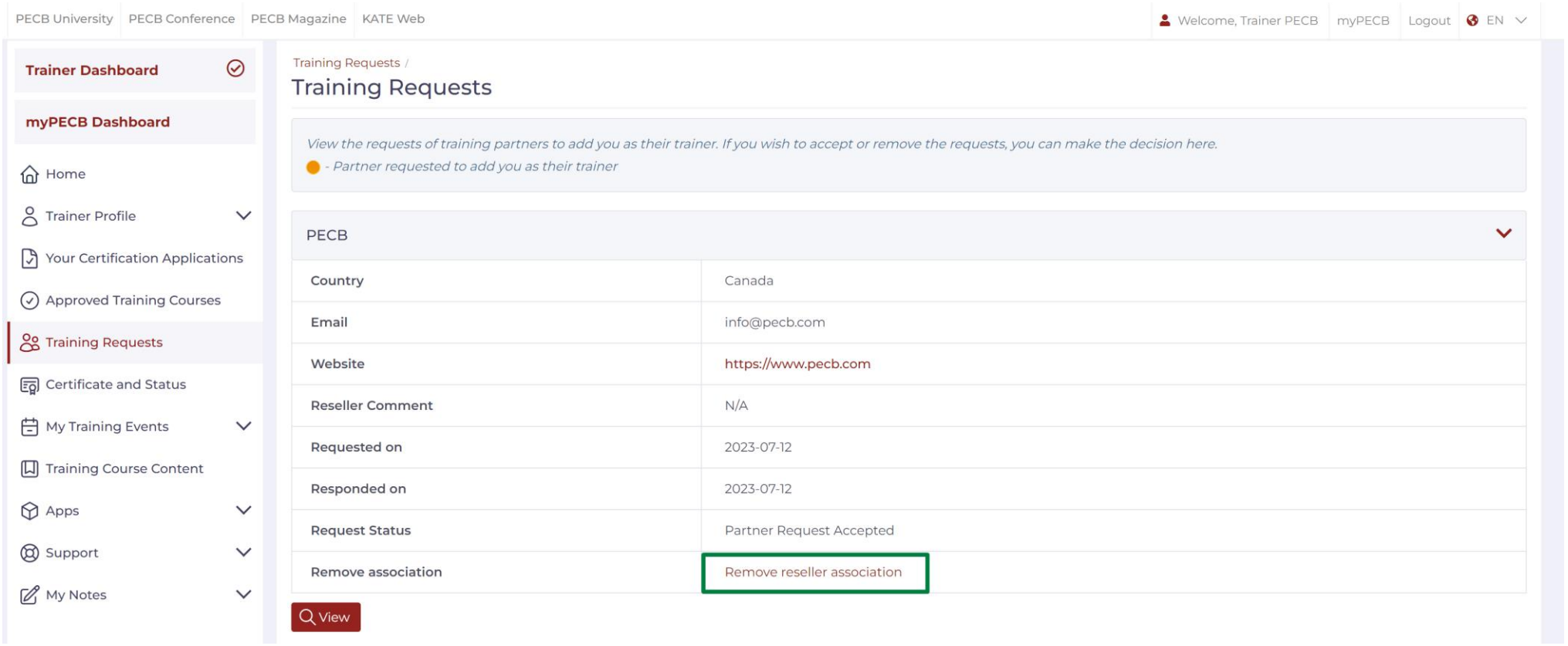


By submitting the decision, the Partner will receive a notification from the PECB System informing them about the Trainer's decision. The Trainer can submit one decision per request and if a request is declined the Partner can submit the request again.

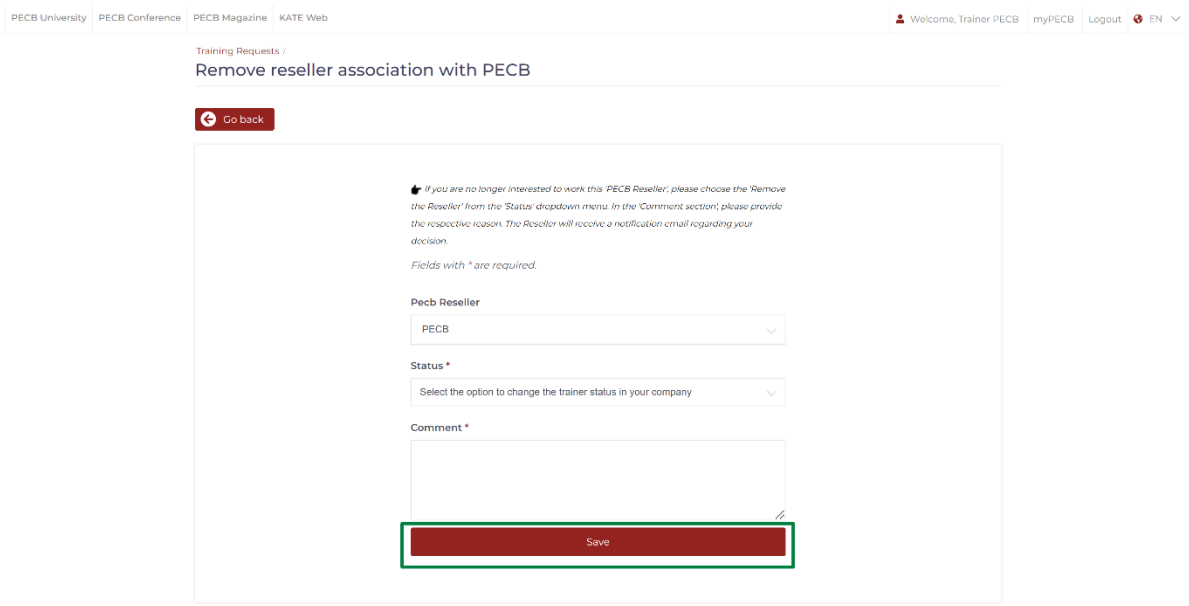
After the initial association, the Partner can publish multiple Training Events with the associated Trainer.

Even though the Trainer has accepted the Partner's request, they can also disconnect from an associated PECB Partner using the Remove association column.

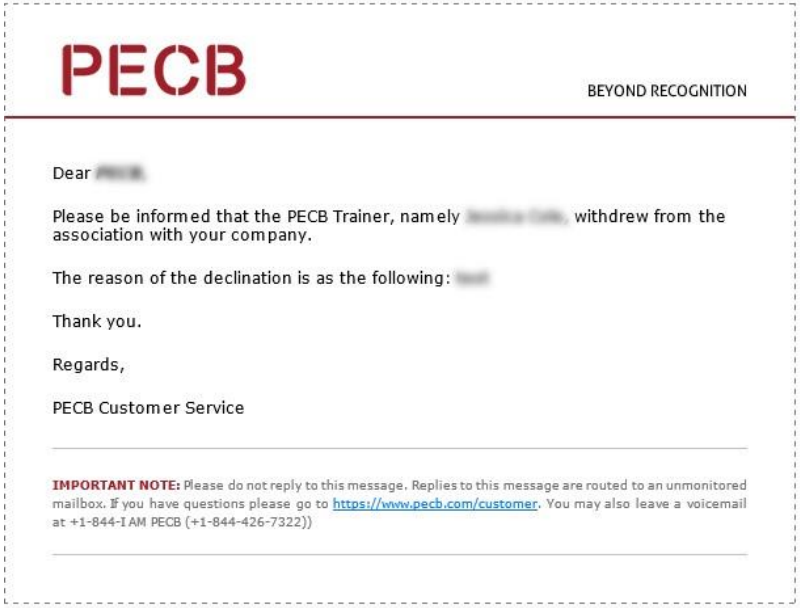
4. Click the "Remove reseller association" link;



5. Update the association status, provide a comment and click the Save button;



7. Once the status is changed, the Partner will receive a notification from PECB system;



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BEYOND RECOGNITION

Dear [redacted]

Please be informed that the PECB Trainer, namely [redacted] withdrew from the association with your company.

The reason of the declination is as the following: [redacted]

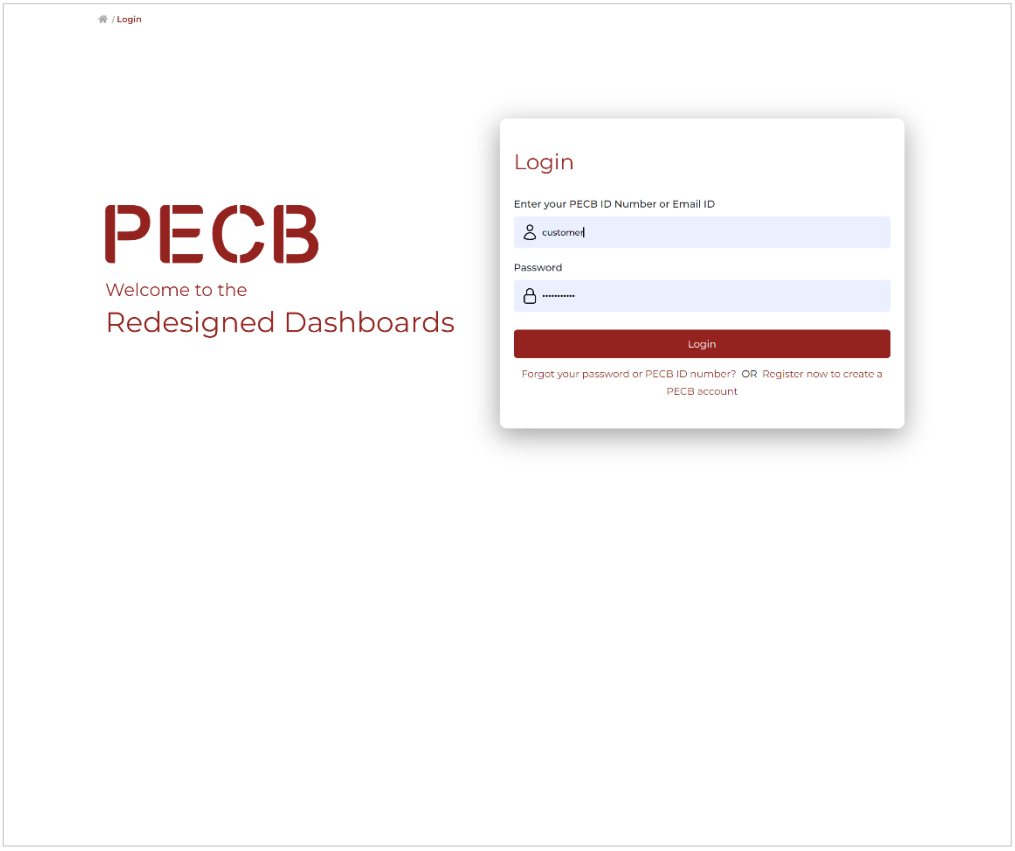
Thank you.

Regards,

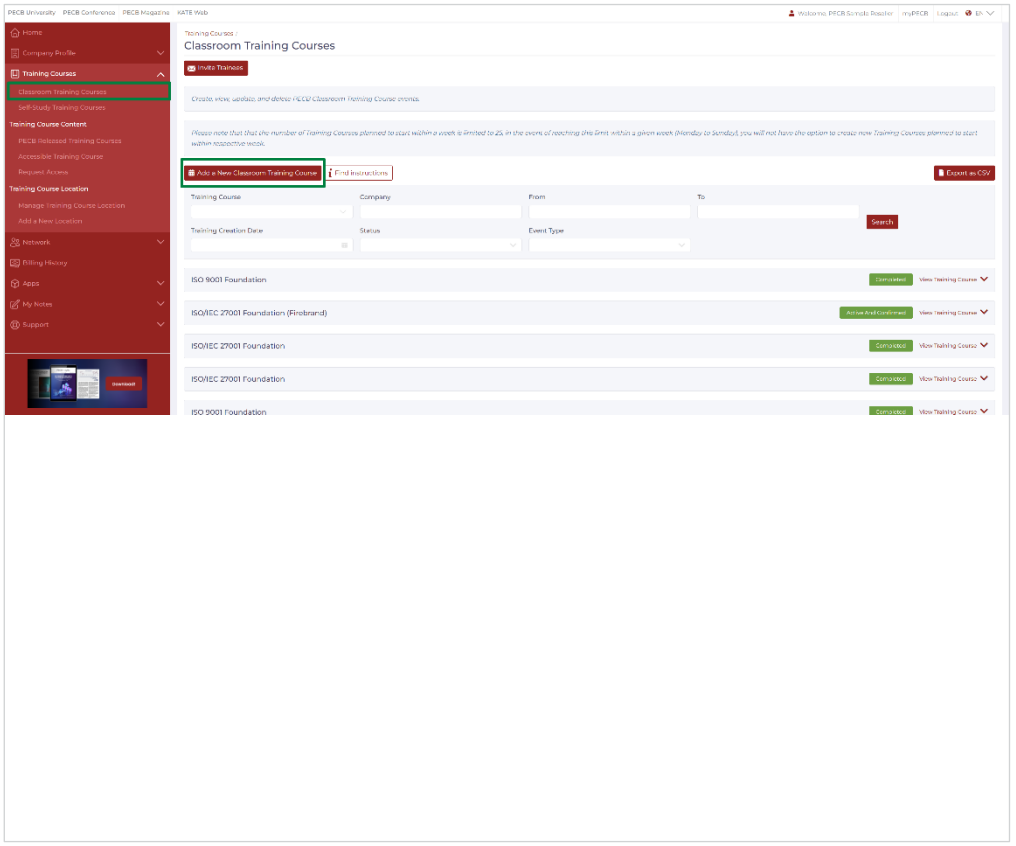
PECB Customer Service

IMPORTANT NOTE: Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions please go to https://www.pecb.com/customer. You may also leave a voicemail at +1-844-I AM PECB (+1-844-426-7322))

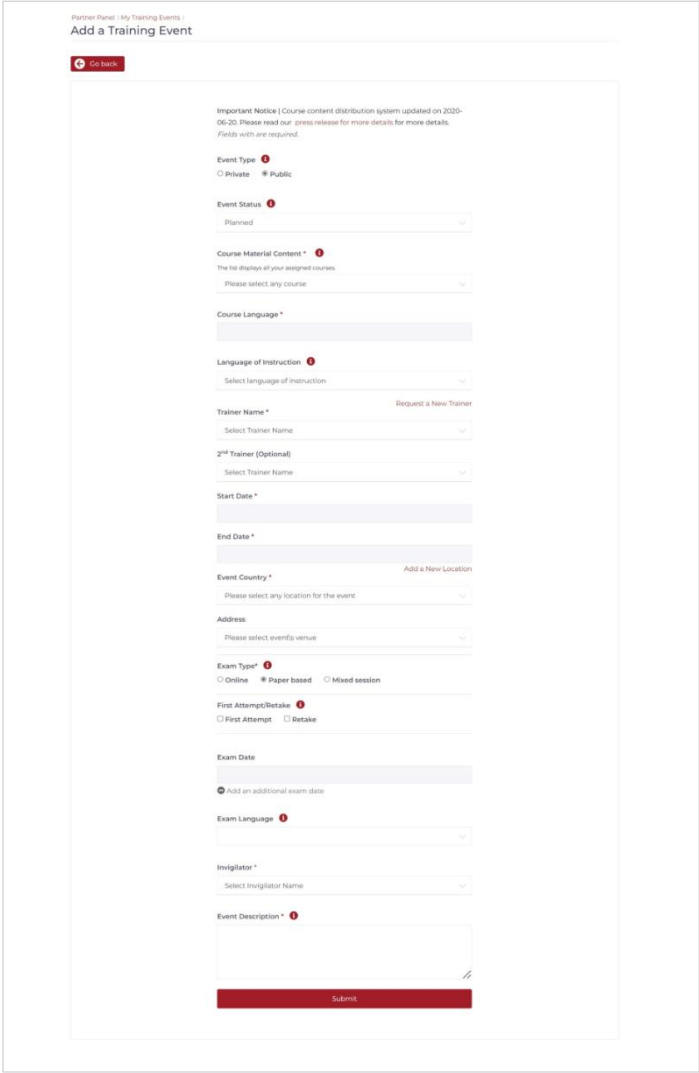
1. Login with your PECB Partner Credentials;



2. Go to the Training Courses tab, then go to Classroom Training Courses and click the Add a New Classroom Training Courses tab;



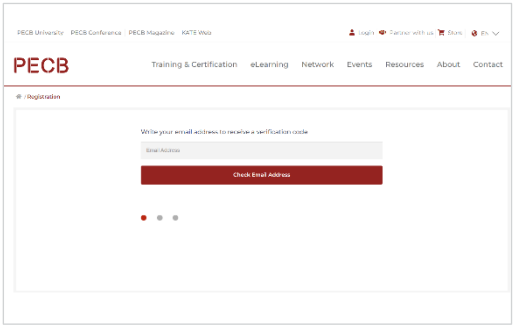
4. Add the required event details and click "Submit";

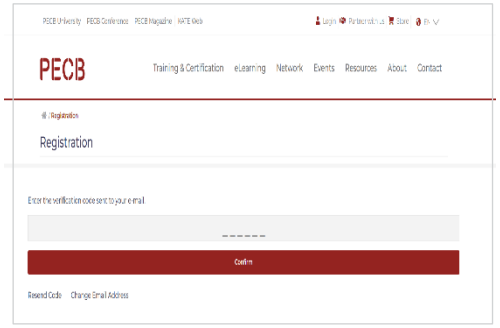


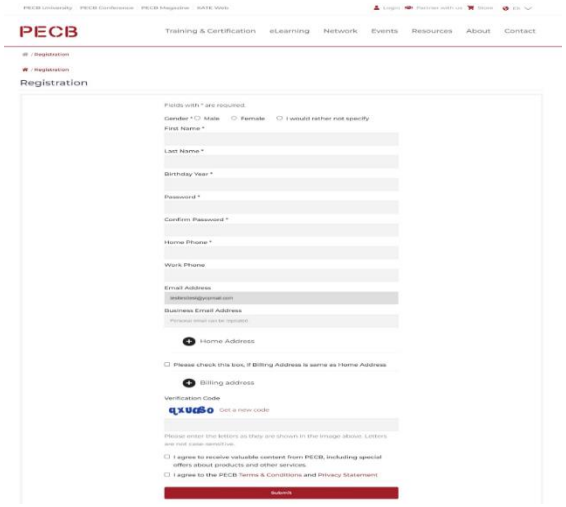
Select Training Event Type	**A PECB Training Event can be Public or Private.**
Public Training Event	Once published, the event will be visible at the PECB Training Events page. The interested clients can view event details and Enroll in the training event.
Private Training Event	This type of event will not be visible at the PECB Training Events page. Participants can only be registered by the course organizer through their PECB Partner Dashboard. Registration of participants, can be done using their PECB ID Number or email address associated with their PECB account. If the client does not have a PECB account, the Partnner can create one on their behalf by sending an activation link following instructions on step 04 in this manual.
Event Status	The Event status options that can be selected: Active and Confirmed, Planned, and Inactive. • **Active and Confirmed** can be selected when Trainees have confirmed their participation, • **Planned** events with the status Planned, will remain planned until a course participant is enrolled in the event. Furthermore, Partners can select the event status to be Planned when data such as: Trainer, Invigilator, and Exam date are yet to be defined, and the training start date is not earlier than 2 weeks from the day the event is being published. • **Inactive** status can be selected when a PECB Course organizer cancels a course event.
Course Content	**By filling the "Add a new Training Event" form, the PECB Partner is also officially submitting a Booking Form requesting the relevant course materials.**
Course Content	Course scheme, Course Language, and Language of Instruction should be provided in order for the booking request to be processed by the PECB System. It is important that the data provided is accurate in order to avoid any possible inconveniences or delays by printing the wrong course material, language, or scheme.
Select Trainer	**On a Public or Private Training Event on a public or private Training event the partner can select one of his trainers as a main trainer and a second trainer as optional.**
Trainer Name	Before having the Trainer available for selection, the PECB Partner account should be first associated with a PECB Certified Trainer account. (See step 01 for details on how to associate with a PECB Certified Trainer). Once the association is setup, the Trainer will be available at the **Trainer Name** dropdown menu for selection.
Trainer presentation materials	If trainer presentation materials are also needed for the course, the PECB Partner can check-mark the "**Trainer presentation materials**" check box in order to provide the assigned PECB Certified Trainer with the download link, via email. Trainer presentation materials will be provided only temporarily during the transition period, as all course content will be distributed electronically via KATE.
Trainer Name	Before having the Trainer available for selection, the PECB Partner account should be first associated with a PECB Certified Trainer account. (See step 01 for details on how to associate with a PECB Certified Trainer). Once the association is setup, the Trainer will be available at the **Trainer Name** dropdown menu for selection.
Training Event Venue	**Training venue details are also required when publishing a training event. A Training Venue does not have to be the PECB Partner's address.**

Course Start/End Date	The course start date can be defined using the embedded calendar. The end date is selected automatically based on the course scheme duration. If needed, the end date can be updated manually by the Partner using the "End Date" bar.
Event Location	A Training event can be registered only at territories attributed to the PECB Partner. The event location should be registered at the Event Location tab in advance. If the training event is being organized at a new location from the ones used before, simply click the "Add a new location" link to add the location. **Note:** If you would like to organize a training event in a territory different from where you operate (e.g. if you operate in North America and want to organize a course in Germany), please contact the Distributor assigned to that territory to establish an agreement. The full list of all Attributed Territories can be found here: https://pecb.com/en/attributed-territories
Select Exam Session Type	**A training event can be followed by a paper-based exam session, or by allowing the candidates to take the exam online and individually.**
Paper Based Exam Type	If the **paper based option** is selected, a drop-down menu of approved Invigilators will be available for the Partner to select the respective Invigilator who will be receiving the exam materials download link. The selected Invigilator will receive the link to download the encrypted exam materials at the earliest one week before the planned exam date. On paper based sessions, the Partner should define if the session will also have examinees retaking the exam. If yes, than the Partner should provide the full name of the candidate(s) planning to retake the exam, and also the exam date when the candidate(s) sat for their first attempt, so that the PECB Examination department can verify the retake request.
Exam Date	**The paper-based exam date can be freely selected by the Partner. The partner will be able to select two exam dates also.**
Online Exam Type	If the **online exam type** is selected, the PECB Partner will not be administrating the exam session. The online exam sessions are administrated directly by PECB through its remote exam invigilators. The PECB Partner should only provide the course participants with a coupon code they can use to schedule an exam session and then apply for the Certificate if the exam is passed successfully. Instructions on sending coupon codes to the course participants are provided at step 06 and instructions for PECB Clients on how to schedule an online exam session are provided at steps 08 and 09.
Mixed Session	Selecting the **Mixed Session exam type**, Partners are expected to define the exam type per each candidate at a later stage when the course is completed/ submitted. By selecting the Mixed Session exam type, the Partners will be required to also provide details such as: Exam Date, Exam Language, and Invigilator.
Event Description	Further details regarding the training event such as directive instructions on how to get to the event location, lunch details, etc. can be added at the Event Description text box.

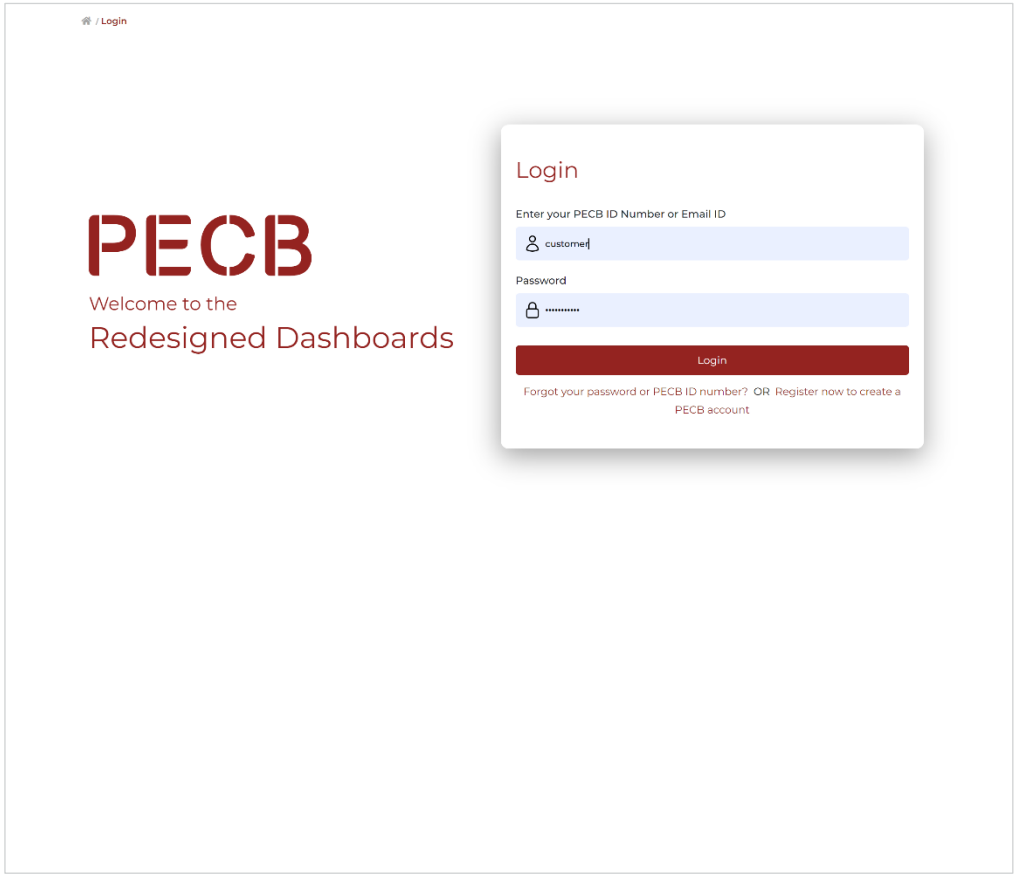
1. Create a "PECB account";



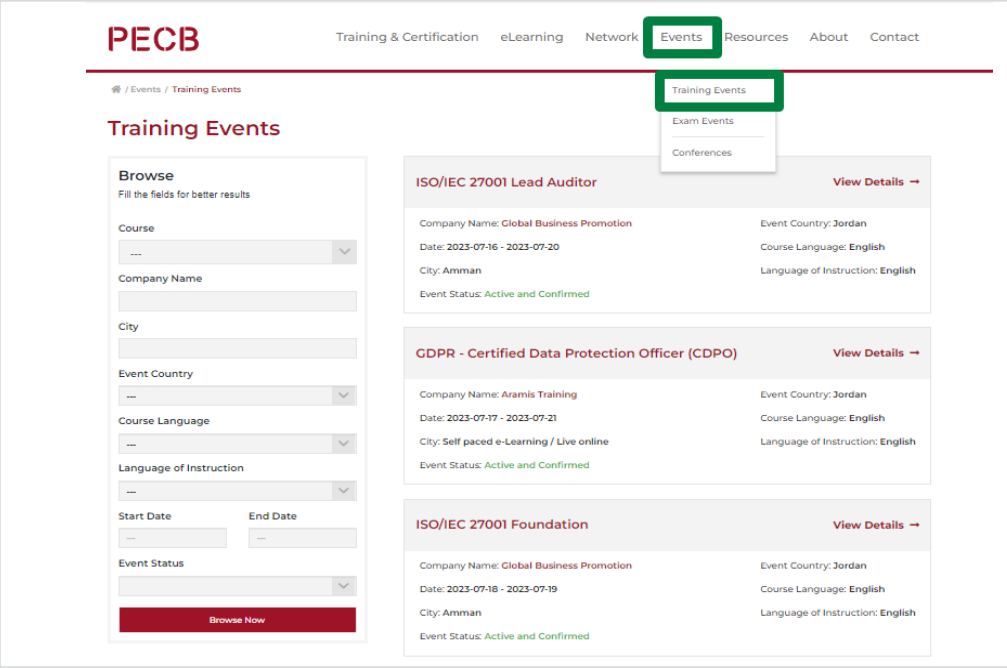




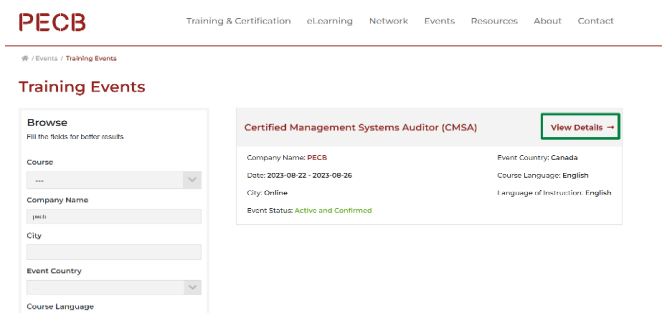
2. Login with your "PECB account" credentials;



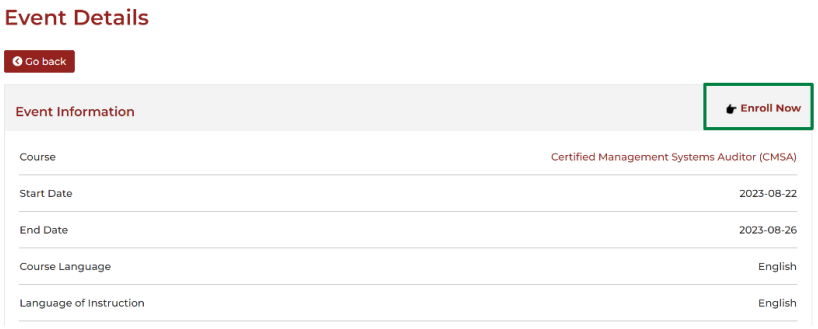
3. Go to the Event tab, and click the Training Events option; https://pecb.com/en/partnerEvent/event_schedule_list



4. Find the Training Event and click the View Details;

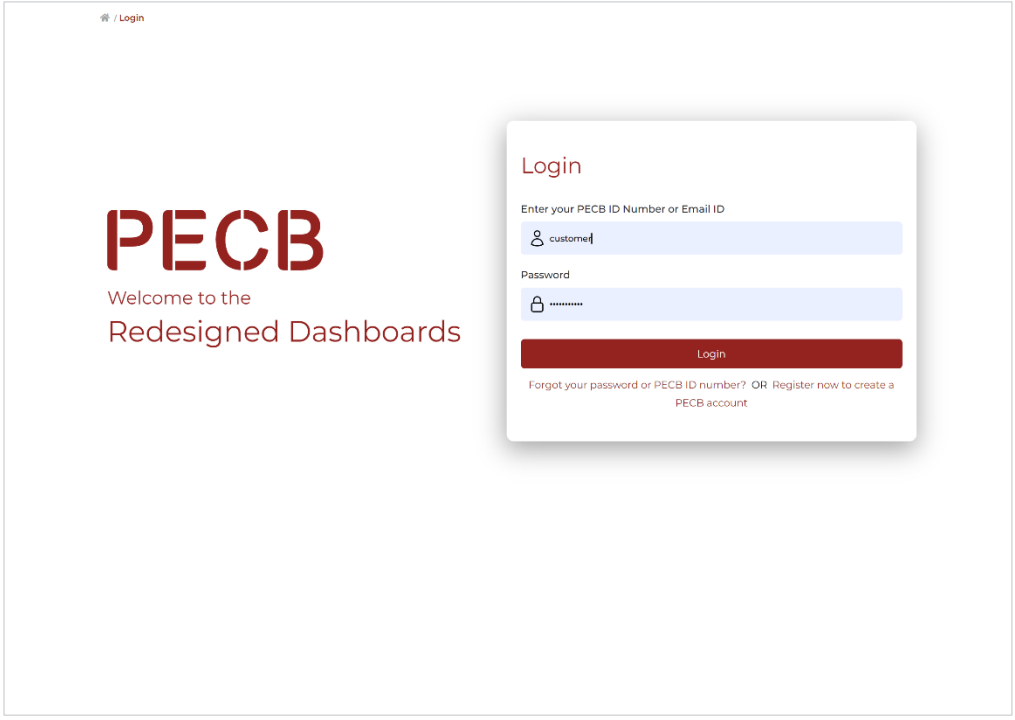


5. Click the Enroll now;

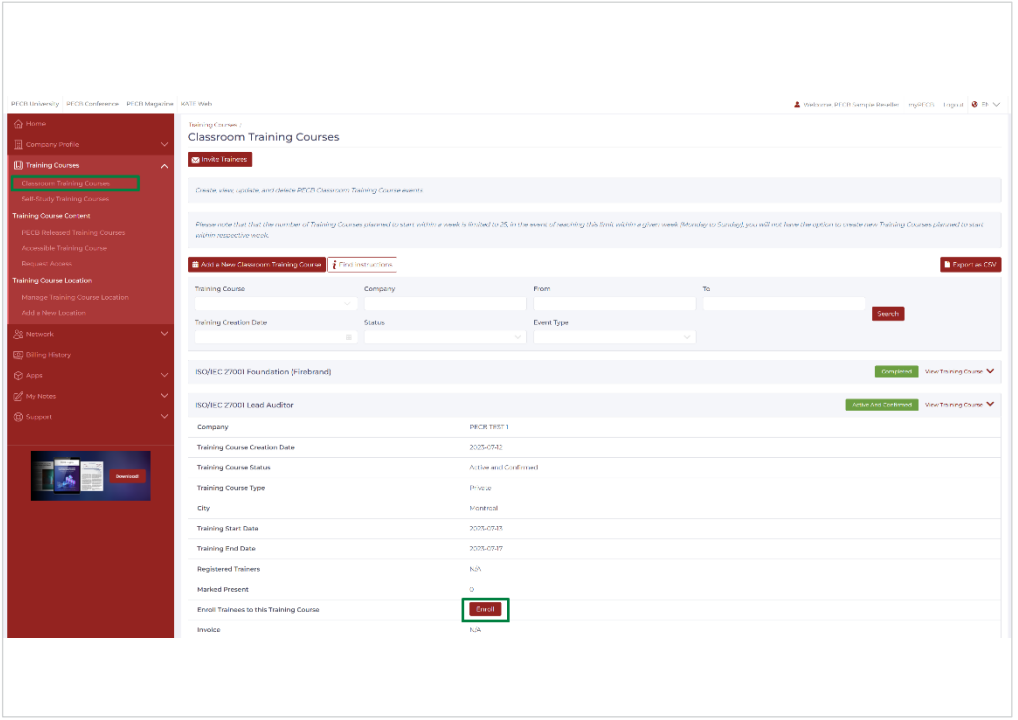


By clicking Enroll Now, the Partner will receive a notification from the PECB System informing about the new enrollment. The course organizer will then confirm and assign course materials for the client to have access through KATE.

1. Login with your PECB Partner credentials;



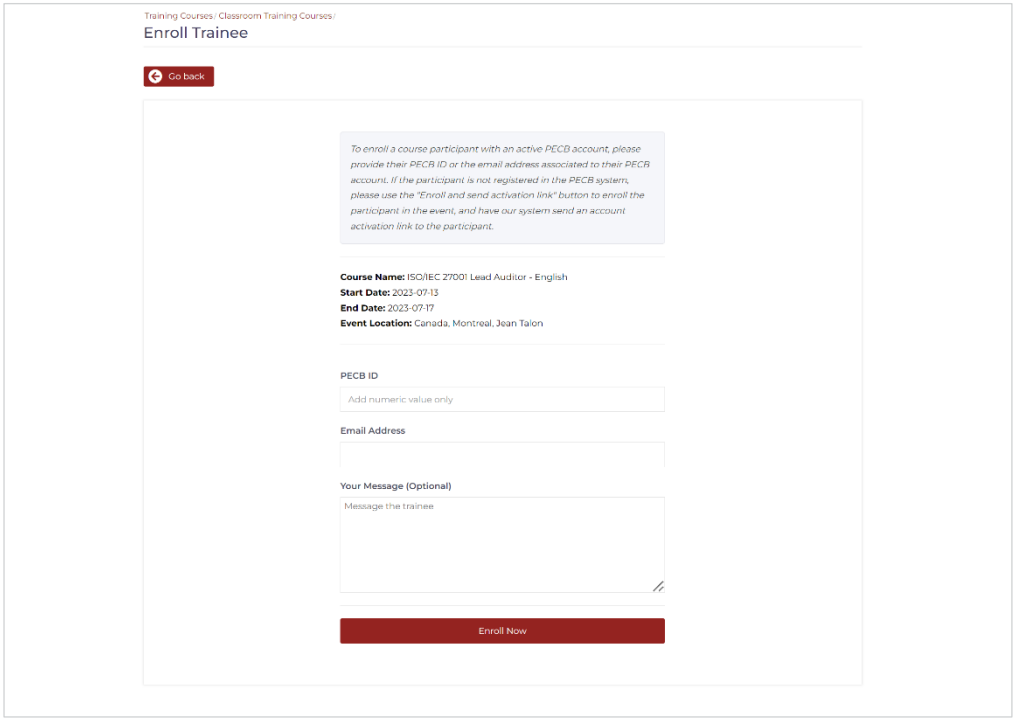
2. Click the Training Courses tab, go to the Classroom Training Courses and at the event click the Enroll button;



In case of a private event, the Partner needs to enroll participants directly on the event list. To do so, go to the "Training Courses" tab and click the "Classroom Training Courses" tab, then click the "Enroll" button at the training event. Continue by typing the PECB ID Number or the email associated to the account and then click the "Enroll Now" button. The "Enroll" button is available until the training event is completed. If the Private Event is not created yet, please see step 03 for instructions on how to publish a

Upon clicking the "Enroll Now" button, the respective client will receive an automatic notification from PECB System informing him/her on the enrollment and the event details.

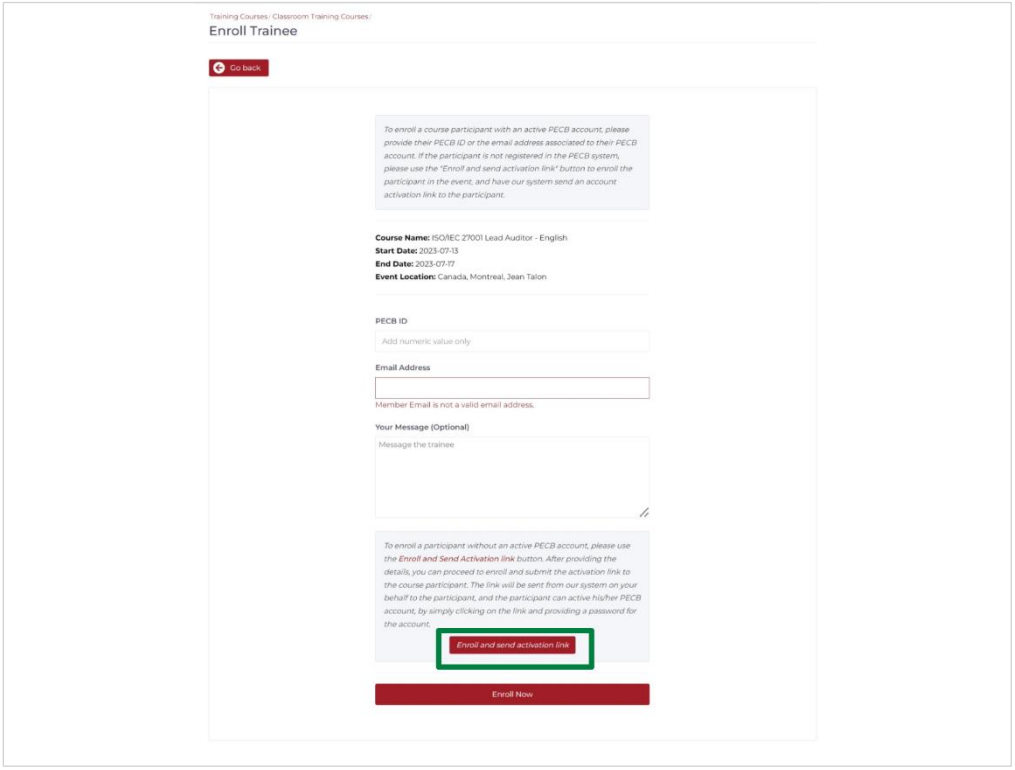
3. Input ID Number or Email address and click the "Enroll Now" button;



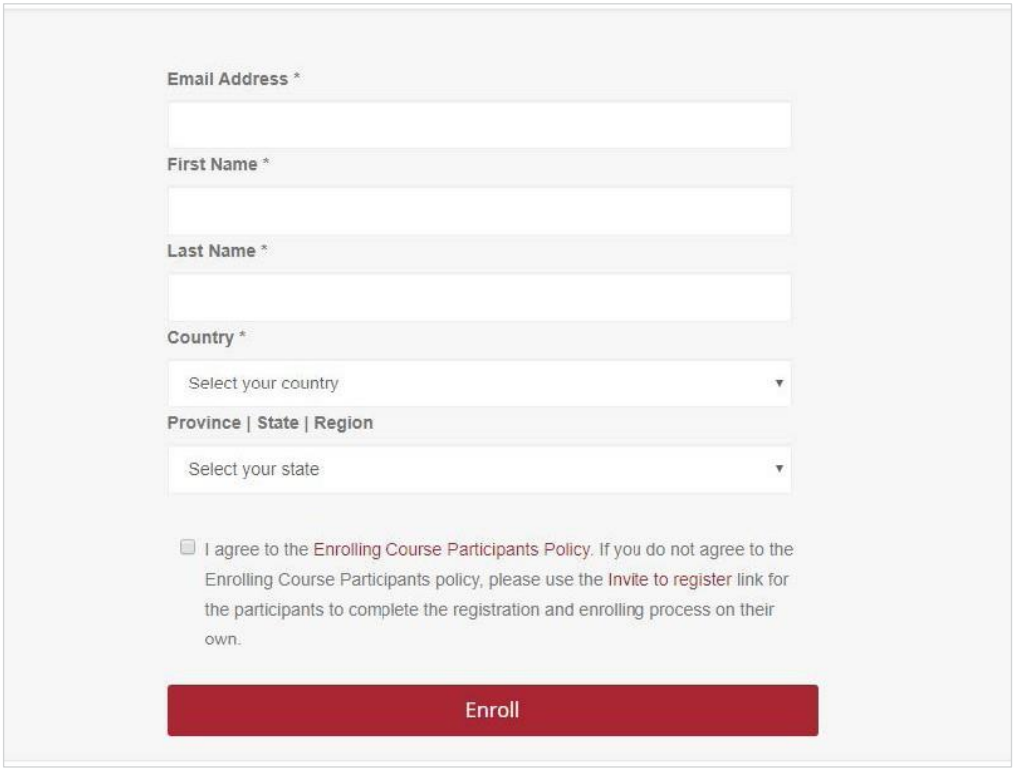
If the course participant results not registered in the PECB system, the Partner can use the "Enroll and send activation link" button to create an account on behalf of the client which will be activated only after the client clicks on the activation link sent by the PECB system.

To enroll the client in the event, and send the activation link, the Partner is required to provide the client's email address, first name, last name, country of residence, and province/state/region.

5. Send Activation Link using the "Enroll and send activation link" button;

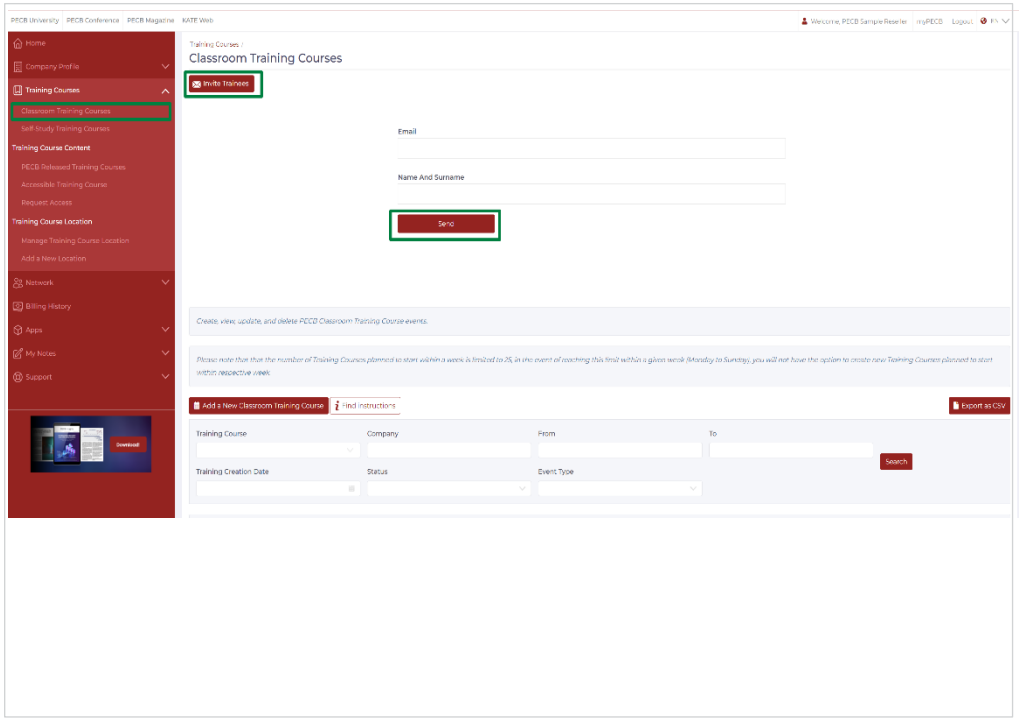


6. Provide the client's details;

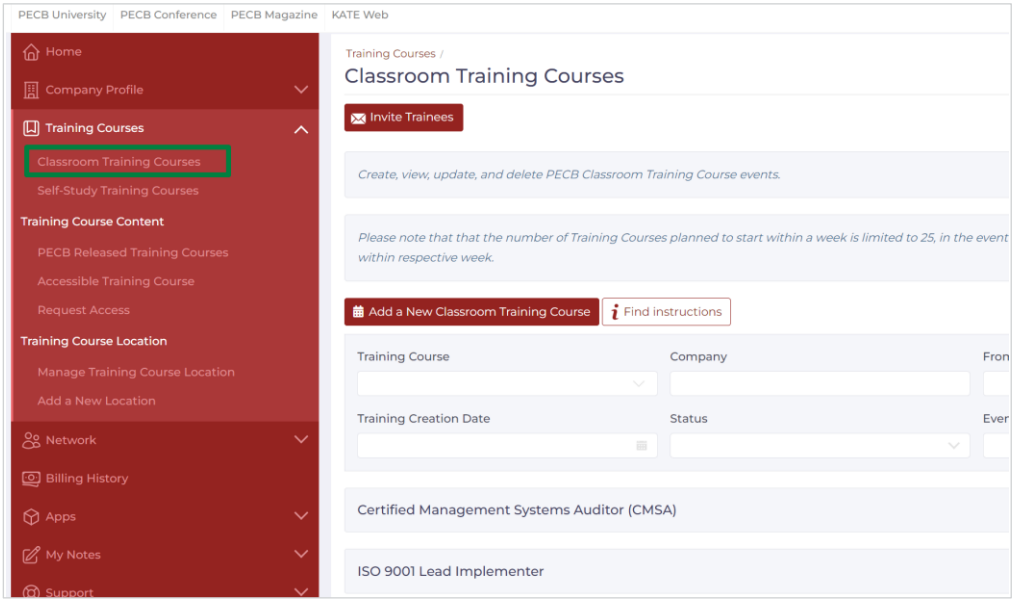


If the PECB Partner does not agree with the PECB Enrolling Course Participants Policy, as an alternative, the Partner can invite the client to open one by using the "Invite Trainees" button. Clicking the button, the Partner will be prompted to provide the client's full name and the email address which will be associated with the PECB account. Once the client opens the account, the enrollment in the Private Training Event will be completed automatically, and the Partner can proceed confirming the presence and assigning the course materials.

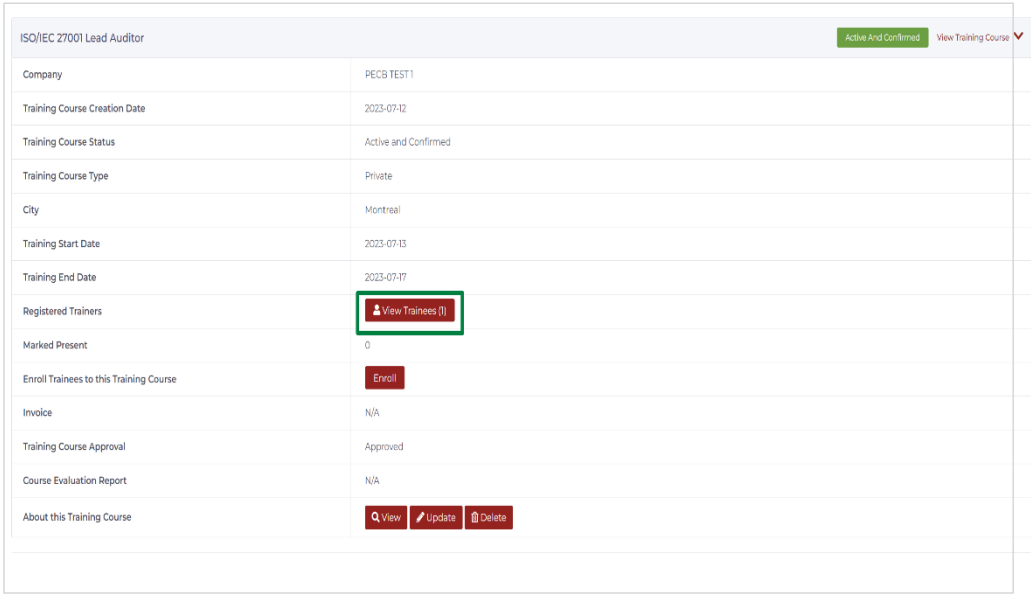
7. Go to the Training Courses tab, at the Classroom Training Courses tab, click the Invite Trainees button to provide the course participant's full name and email address, and click Send;



1. Click the Training Courses tab and go to the Classroom Training Courses tab;



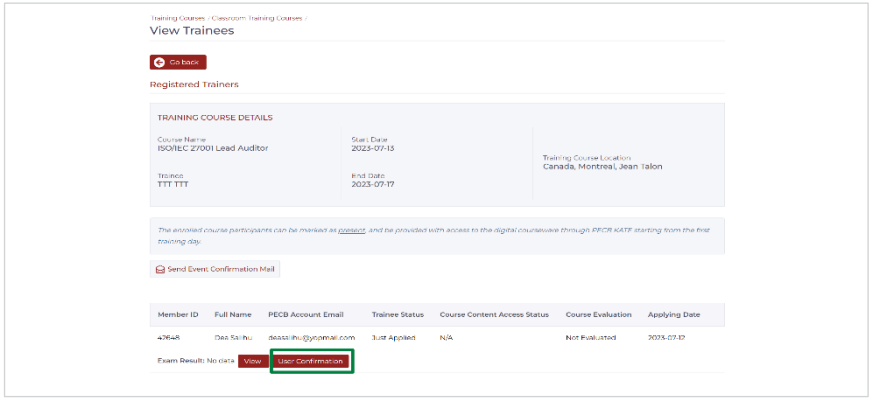
2. Click the "View Trainees(x)"



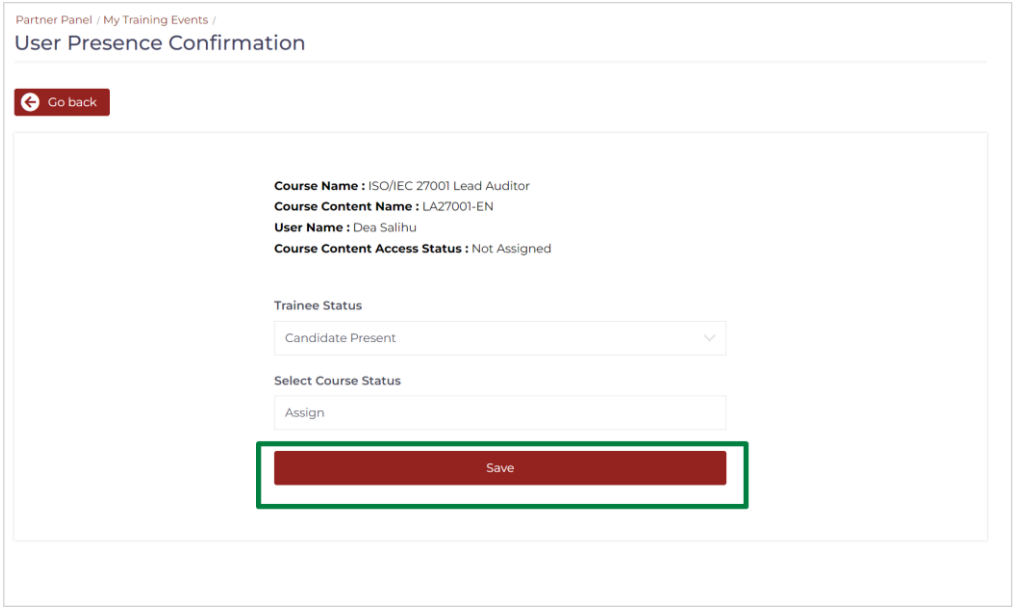
Once participants have been registered, using the Partner Dashboard you can confirm their presence and grant them access to the course materials digitally. To mark the participants as present and assign the course materials you can use the User Confirmation button which becomes available at the training start day.

Note: To provide the course participants with printed copies of the course materials, please use the Course Content tab or KATE to download the materials for printing purposes.

3. Click the "User Confirmation" button;

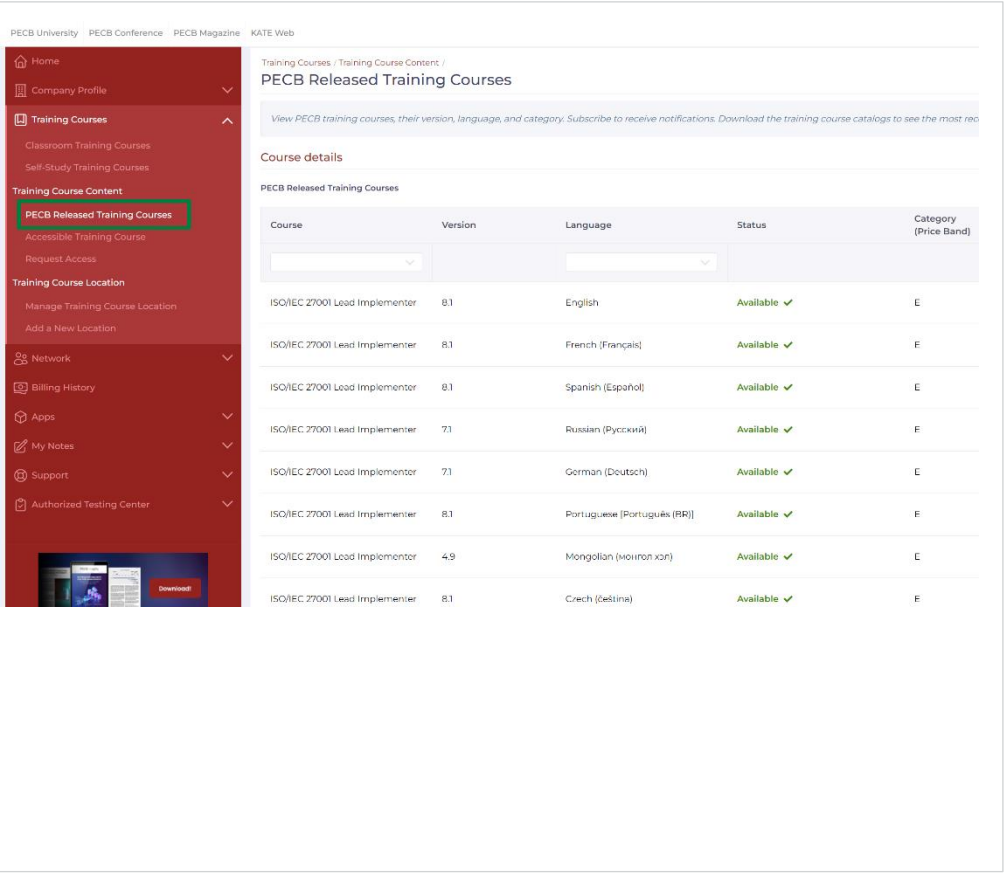


4. Update Trainee and Course Content Access Statuses;

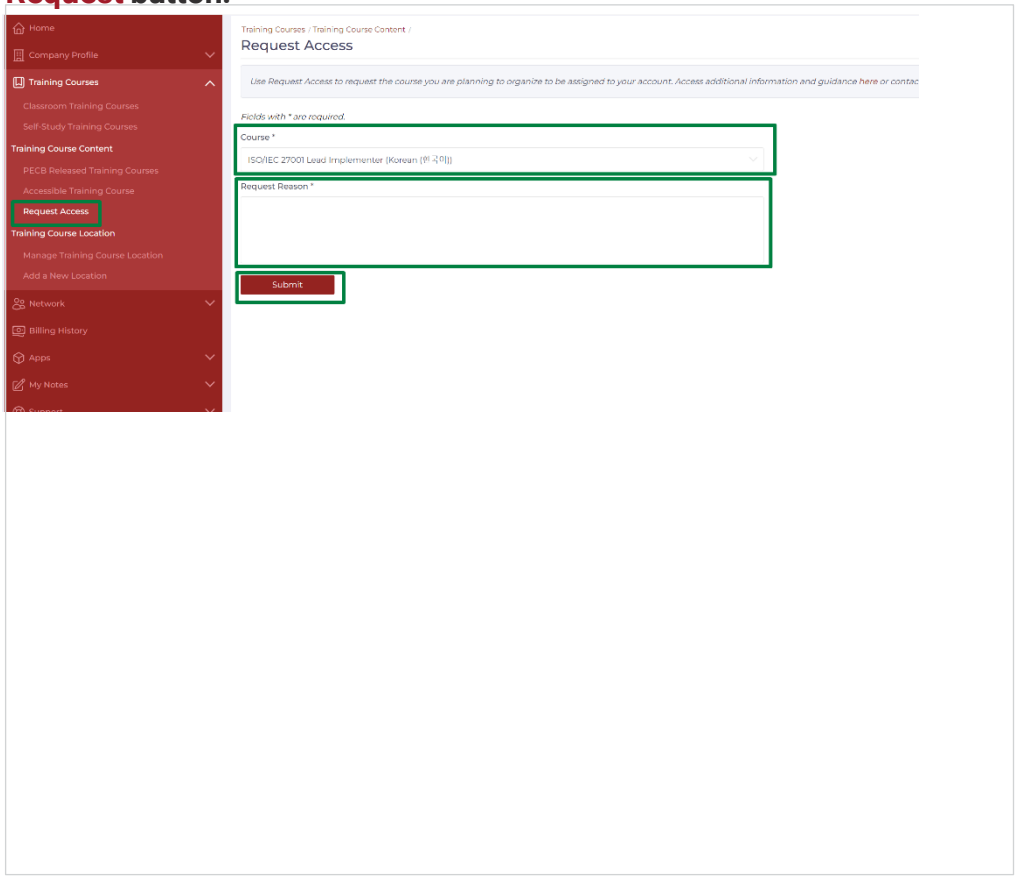


5. Client receives a notification from the PECB System via email;

1. Click the Training Courses tab, and go to the PECB Released Training Courses tab;



2. At the Request Access table, use the drop-down menu to select the course being requested, provide a reason and click the Submit Request button.



3. When your request is approved, a notification via email will be sent from our system to confirm that your request has been approved;

PECB

Greetings from PECB,

Your request for downloading our **FD9001-EN (ISO 9001 Foundation - English)** has been approved. Therefore, please follow the steps below to download our FD9001-EN (ISO 9001 Foundation - English) materials in PDF format.

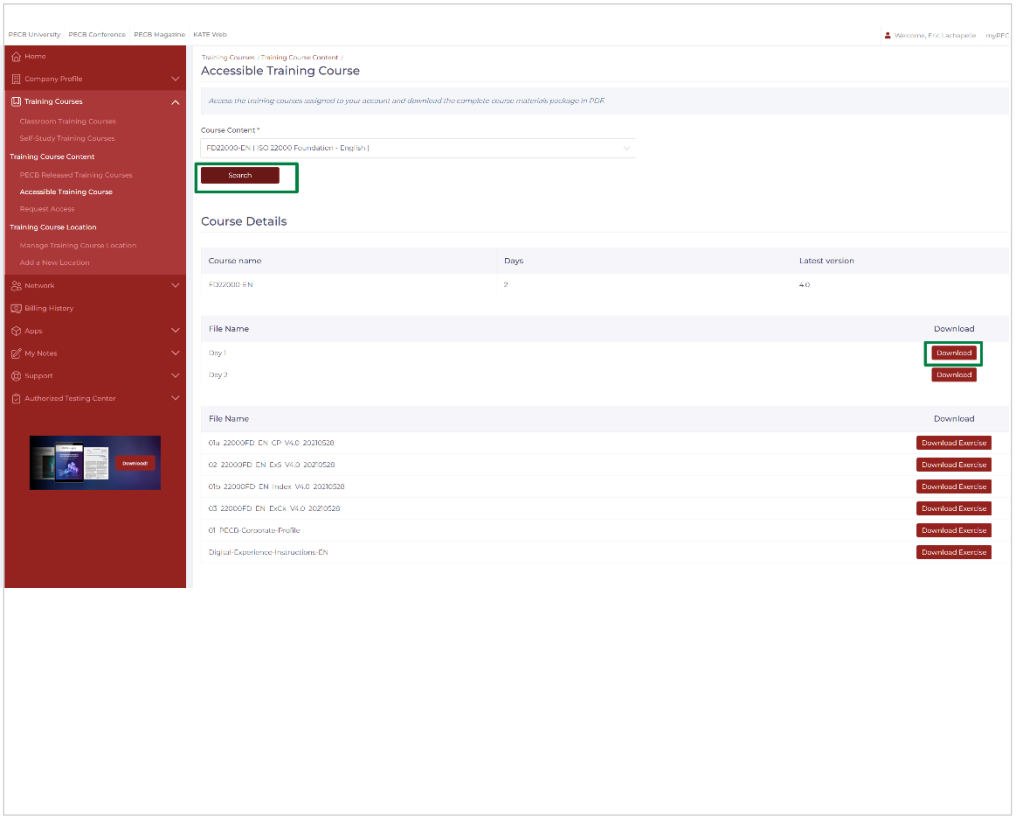
1. Login at your PECB Partner Dashboard;
2. Click the **Your course content** tab;
3. Click the **Approved Requests** tab;
4. At the approved course, please click the download link to download the files locally;

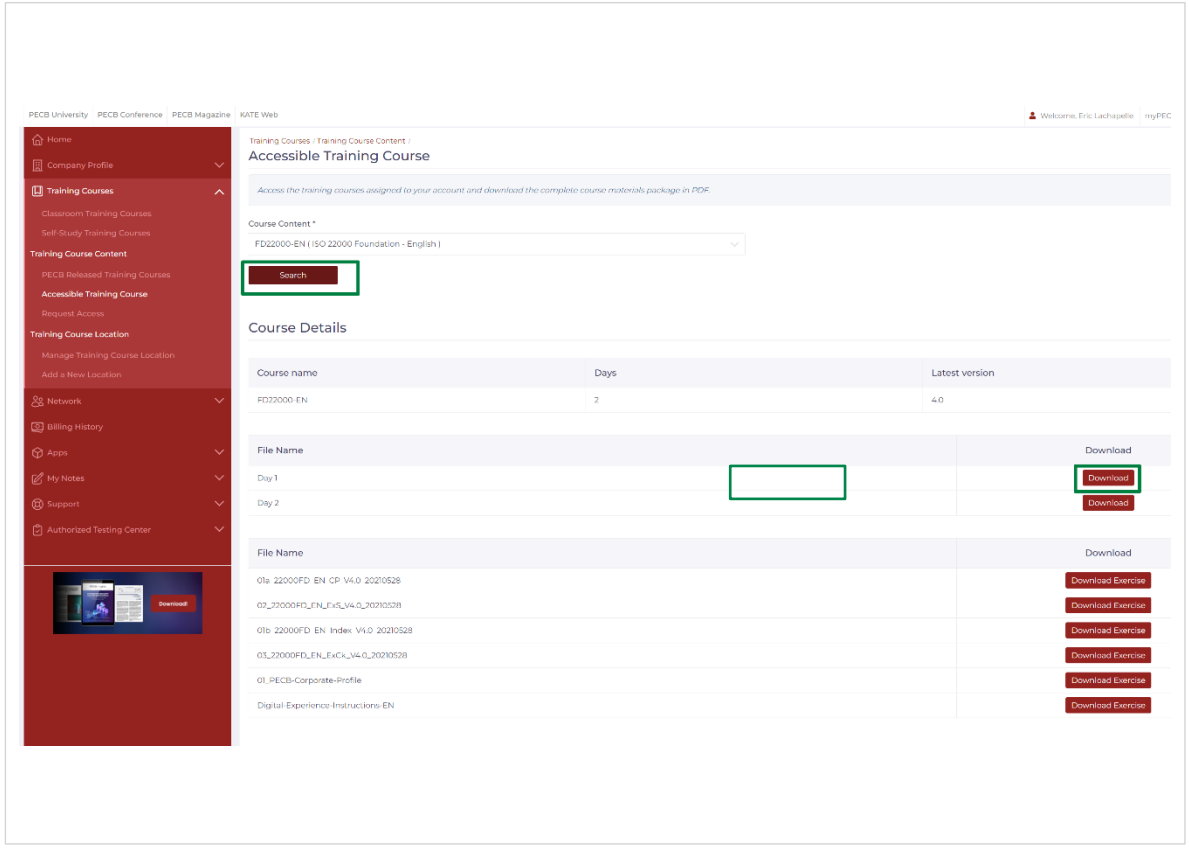
Note that the download link will only be available for **90 days**, after which the link will be removed and will appear again when your new request has been approved. If you need further assistance, please contact us at customer@pecb.com or drop a service ticket at our Help Center.

Best Regards,
PECB Team

IMPORTANT NOTE: Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions please go to https://www.pecb.com/customer. You may also leave a voicemail at +1-844-I AM PECB (+1-844-426-7322)

4. To download the PDF format materials, click the "Approved Requests" tab;





5. On the right side of the course files list, there is a Download link for each file. Click on the download link to select the local directory/folder you would like to save the course file in.

For course sessions lectured using PECB KATE, Paartners should provide the examinees with hard-copy course materials if the paper-based exam session is open book. To do so, the Partners should use the "Request Access" tab to request the materials for printing. When a request is submitted, PECB Customer Service team will review and process it. Having the request approved, the download links per each course day will appear under the "Accessible Training Courses" table.

Downloaded course materials will be stored locally on your computer storage. Course materials will be downloaded with a watermark generated on each course page.

The watermark will define the licensed party and a copyright notice issued from PECB, prohibiting unauthorized use of the course materials.

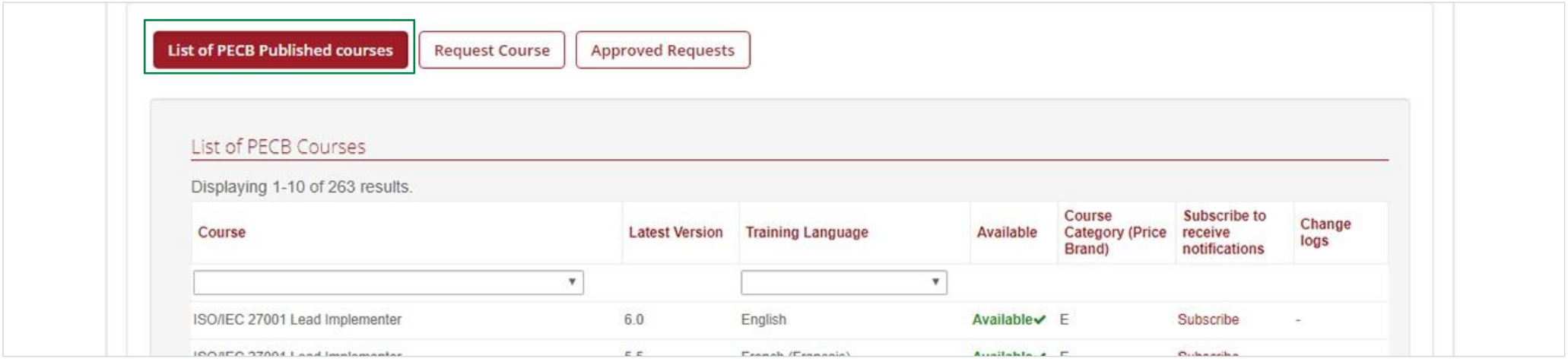
Important Note: Partners should print course materials, if the exam type is open-book.

6. View the "List of PECB Published courses" section;

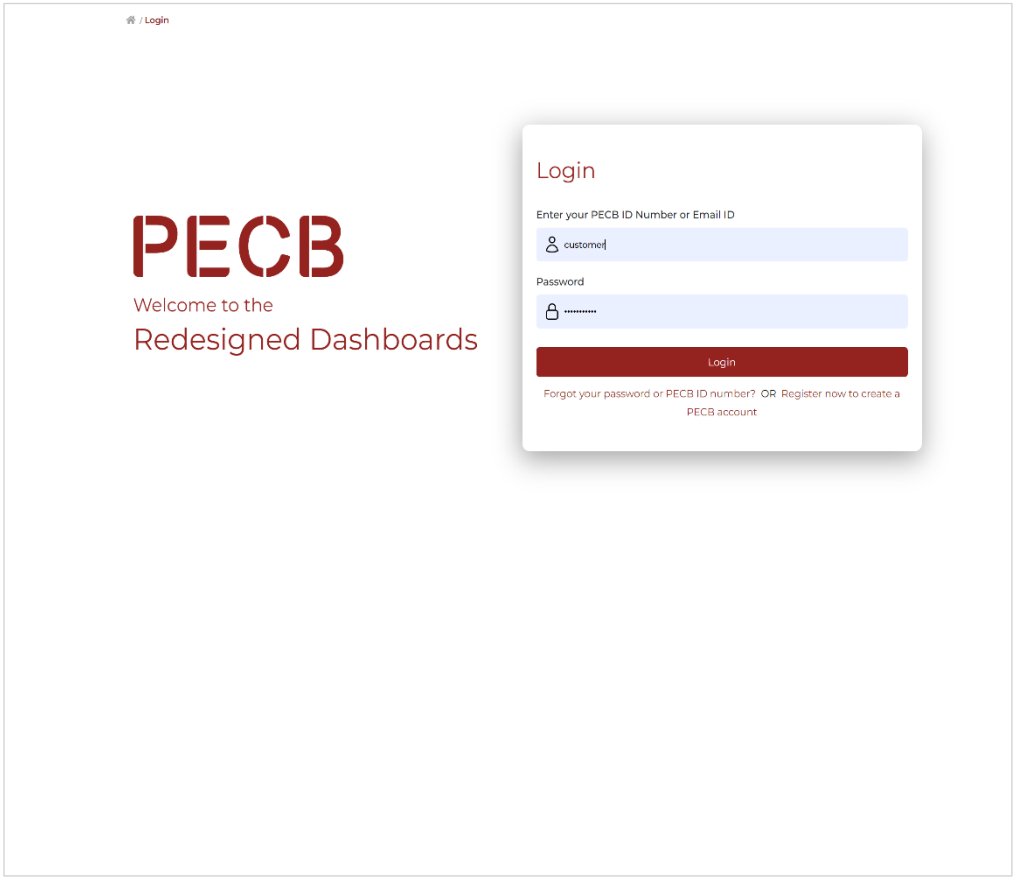
Through the Course Content tab, Partners can also view the complete list of courses available using the List of PECB Published courses section.

The list besides providing information on what courses are available and new courses release dates. It also gives the Partners the opportunity to subscribe for receiving notifications via email when a course: is updated and/or is released.

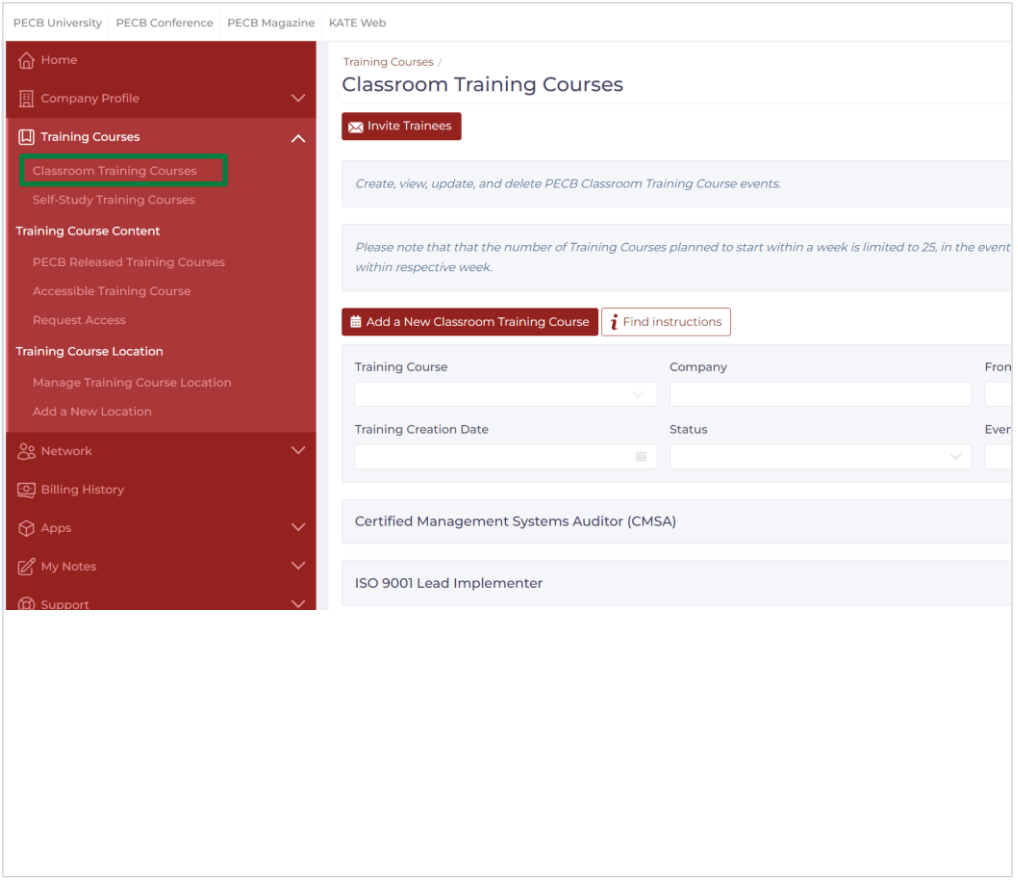
Furthermore, the table also provides additional information in regards to our courses such as: Latest Version, Training Language, Course Category, and the Change log.



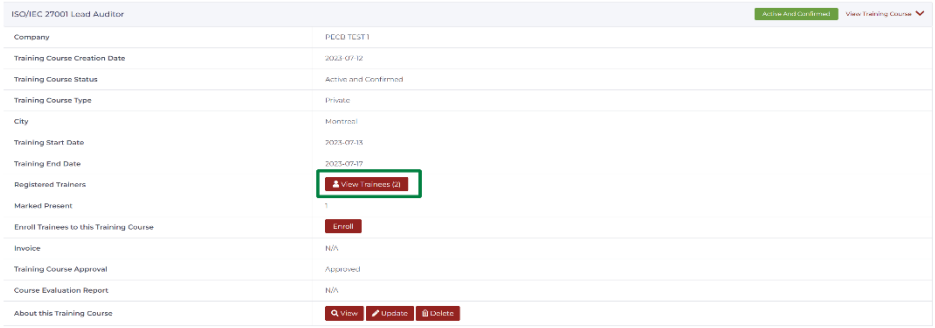
1. Login with your PECB Partner Credentials;



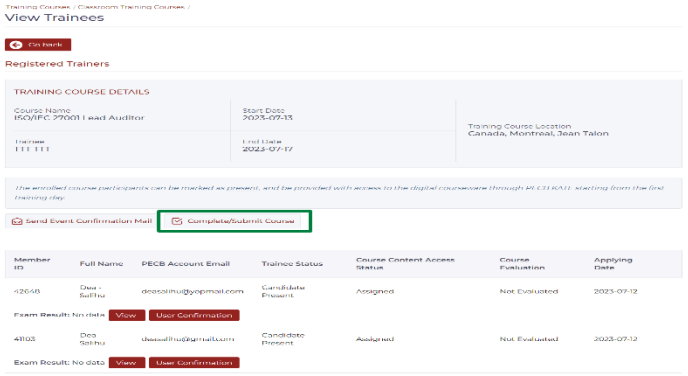
2. Click the Training Courses tab and go to the Classroom Training Courses tab;



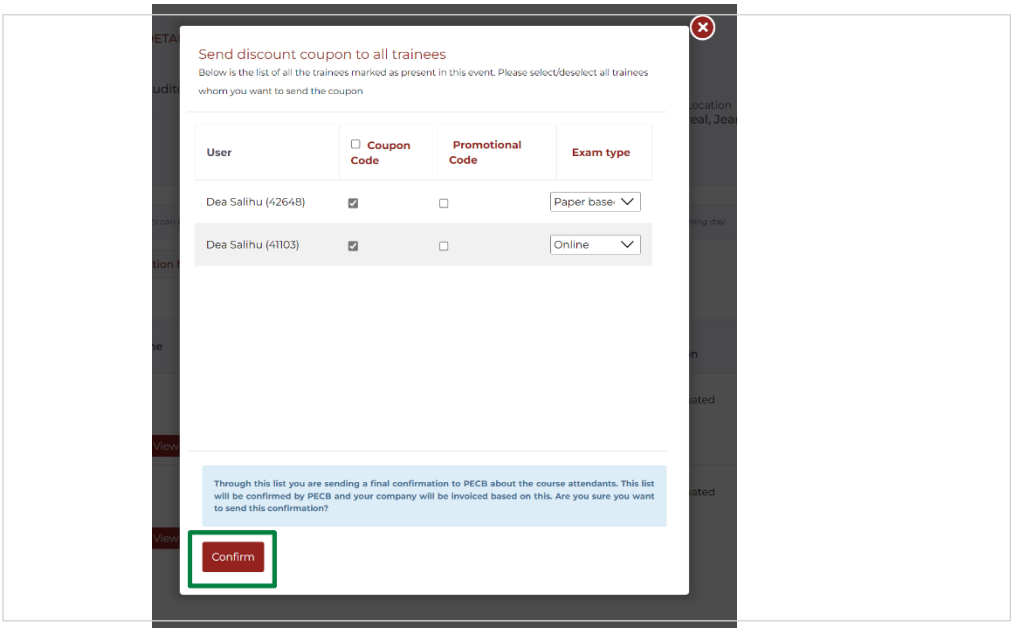
3. Click the "View Trainees(x)"



4. Click the "Complete/Submit course" link;



5. Select the participants that should be provided with coupon codes, and select their exam type individually;

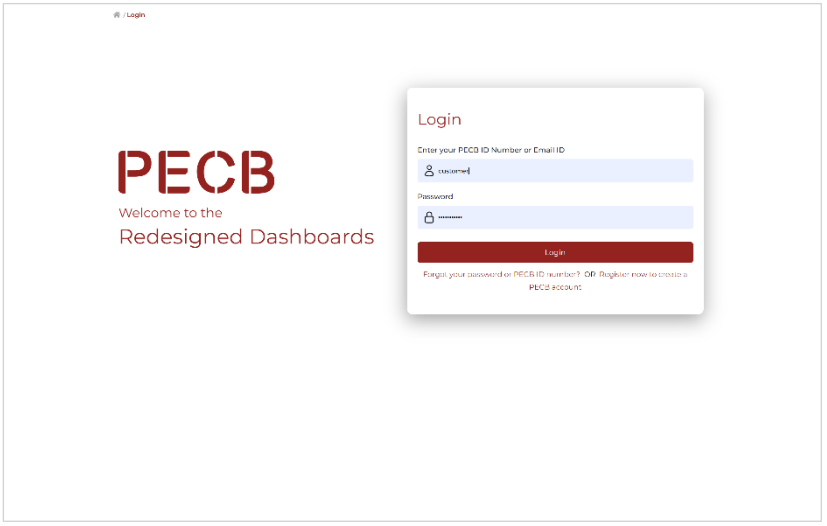


Important Note: The final two steps are mandatory to be performed by Partner in order to complete a training event:

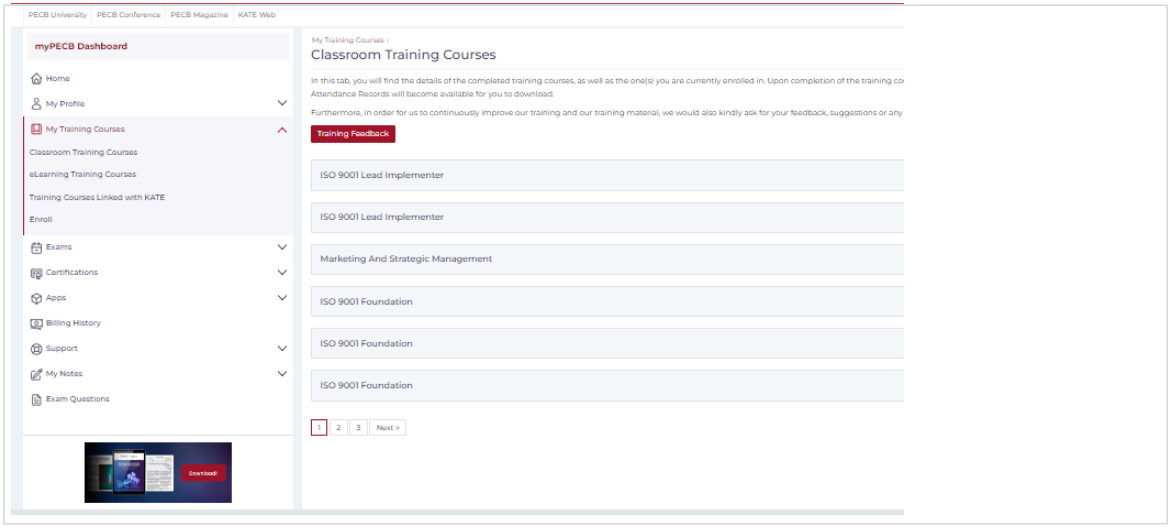
- The Partner must confirm each course participant as present. Participants that have not been marked as present, will not be provided with coupon codes they need to waive the online exam scheduling fee, and the certificate application fee.
- The PECB Partner must click the "Complete/Submit Course" link after all participants are marked as present, have been granted with access to the course materials and have completed the course. This is a mandatory process.

  Once the course has been completed/submitted, PECB system will provide all course participants with a unique coupon code, which they will use to schedule an online exam session and then apply for certification if the exam is passed successfully. Additionally an invoice will be generated and sent to the Partner based on the number of course participants.
- If the exam type is Mixed Session, at this stage, the Partner is required to declare the exam type per each candidate. The exam type will affect the coupon code validity the course participants will receive.

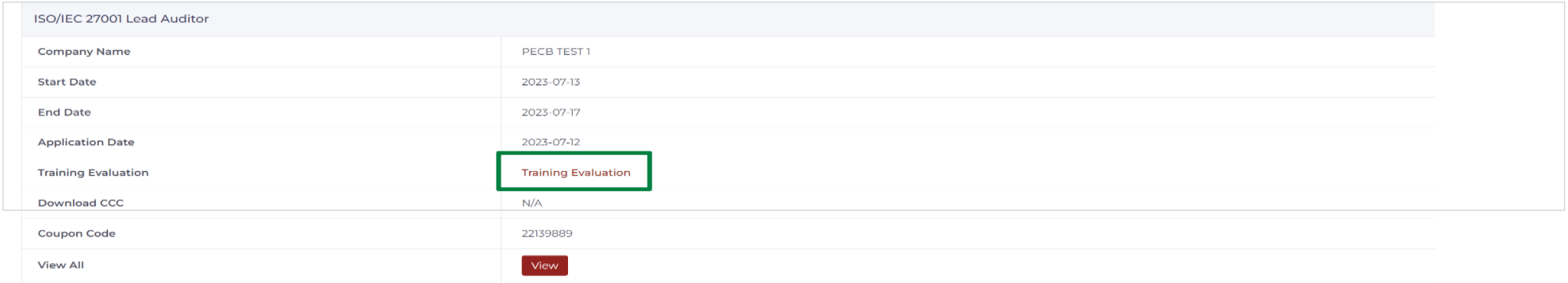
1. Login at your "PECB account";



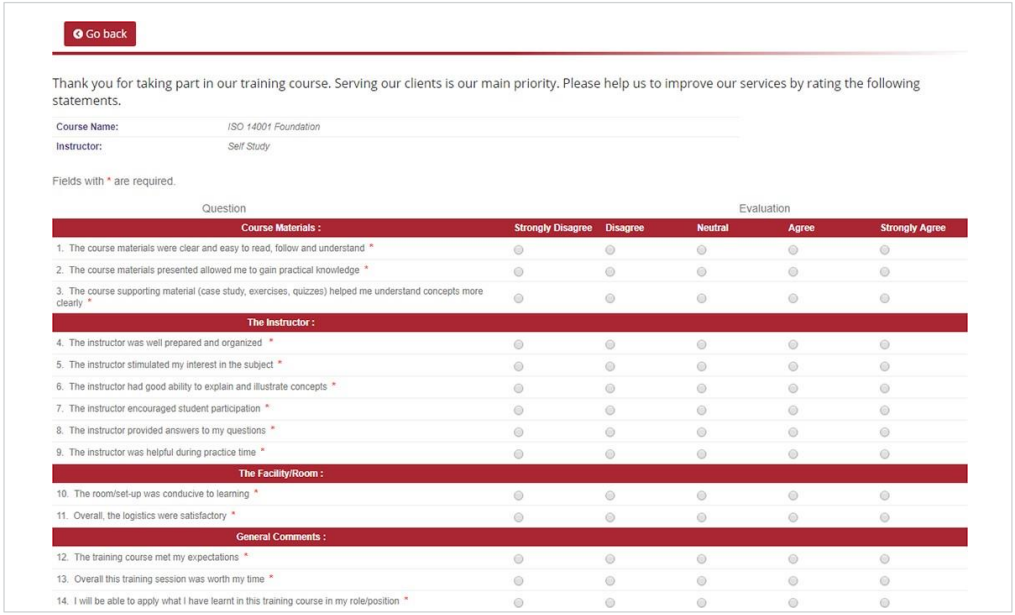
2. Click the Training Courses tab, go to the Classroom Training Courses tab;



3. Scroll down to find the completed course and click the "Training Evaluation" link;



4. Complete the evaluation form and click "Submit";



Go back

Thank you for taking part in our training course. Serving our clients is our main priority. Please help us to improve our services by rating the following statements.

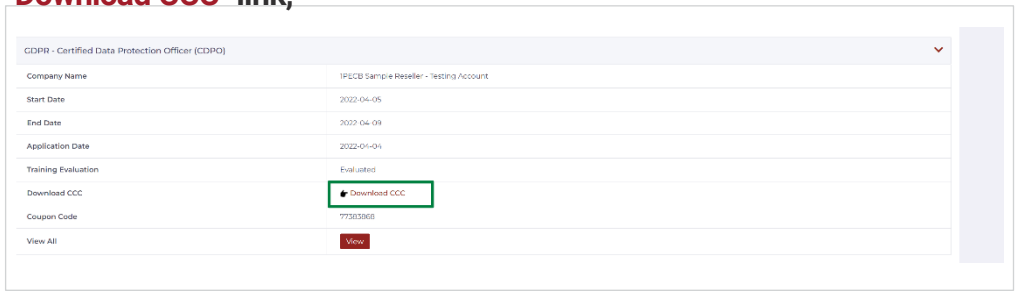
Course Name: *ISO 14001 Foundation*
Instructor: *Self Study*

Fields with * are required.

Question	Evaluation				
Course Materials :	**Strongly Disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly Agree**
1. The course materials were clear and easy to read, follow and understand *					
2. The course materials presented allowed me to gain practical knowledge *					
3. The course supporting material (case study, exercises, quizzes) helped me understand concepts more clearly *					
The Instructor :					
4. The instructor was well prepared and organized *					
5. The instructor stimulated my interest in the subject *					
6. The instructor had good ability to explain and illustrate concepts *					
7. The instructor encouraged student participation *					
8. The instructor provided answers to my questions *					
9. The instructor was helpful during practice time *					
The Facility/Room :					
10. The room/set-up was conducive to learning *					
11. Overall, the logistics were satisfactory *					
General Comments :					
12. The training course met my expectations *					
13. Overall this training session was worth my time *					
14. I will be able to apply what I have learnt in this training course in my role/position *					

Submitting the PECB Course Evaluation Form is **mandatory**. The submission is linked to the Attestation of Course Completion. The PECB Course Attendance Record will be available for downloading at the **myPECB Dashboard** only after the course evaluation form has been submitted.

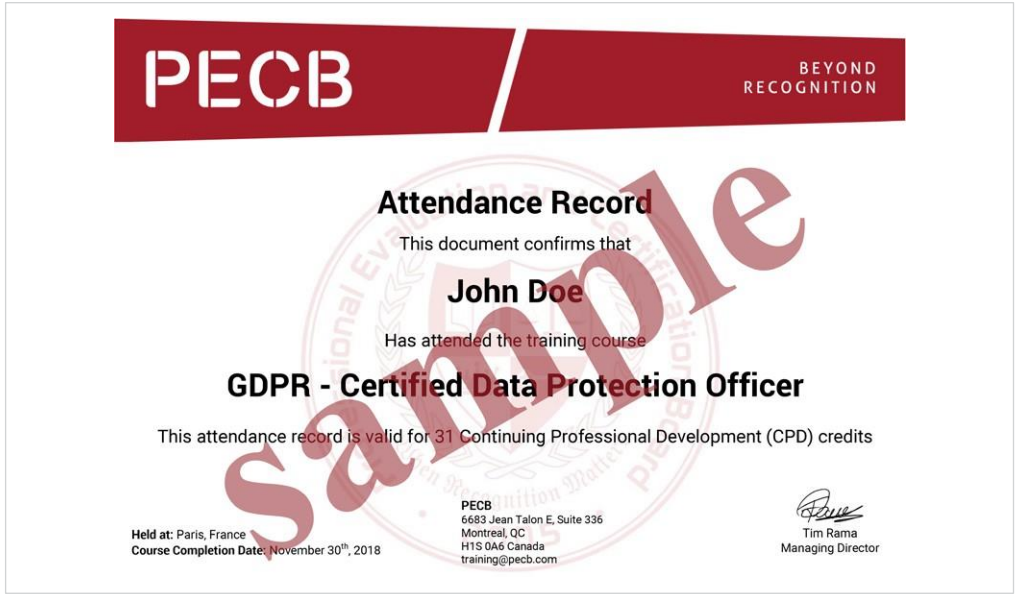
5. Download the Attestation of Course Completion by clicking the "Download CCC" link;



GDPR - Certified Data Protection Officer (CDPO)

Company Name	IPECB Sample Reseller - Testing Account
Start Date	2022-04-05
End Date	2022-04-09
Application Date	2022-04-04
Training Evaluation	Evaluated
Download CCC	Download CCC
Coupon Code	77383868
View All	View

Sample of the Attestation of Course Completion;



PECB — BEYOND RECOGNITION

Attendance Record

This document confirms that

John Doe

Has attended the training course

GDPR - Certified Data Protection Officer

This attendance record is valid for 31 Continuing Professional Development (CPD) credits

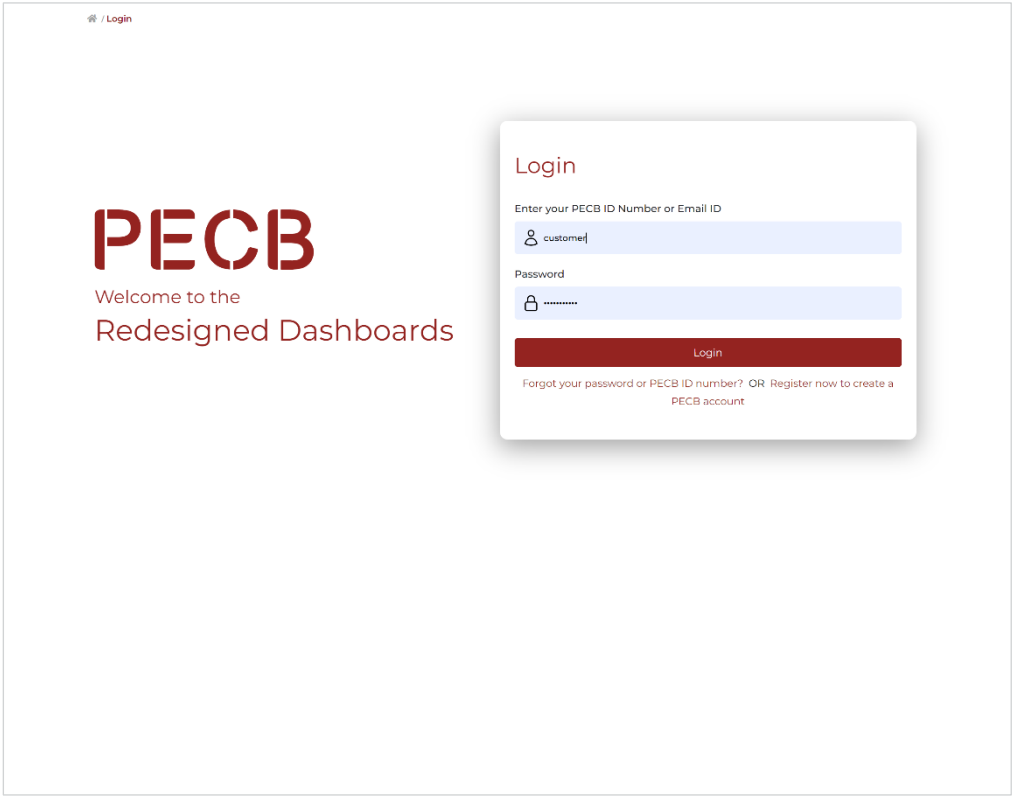
Held at: Paris, France
Course Completion Date: November 30th, 2018

PECB
6683 Jean Talon E, Suite 336
Montreal, QC
H1S 0A6 Canada
training@pecb.com

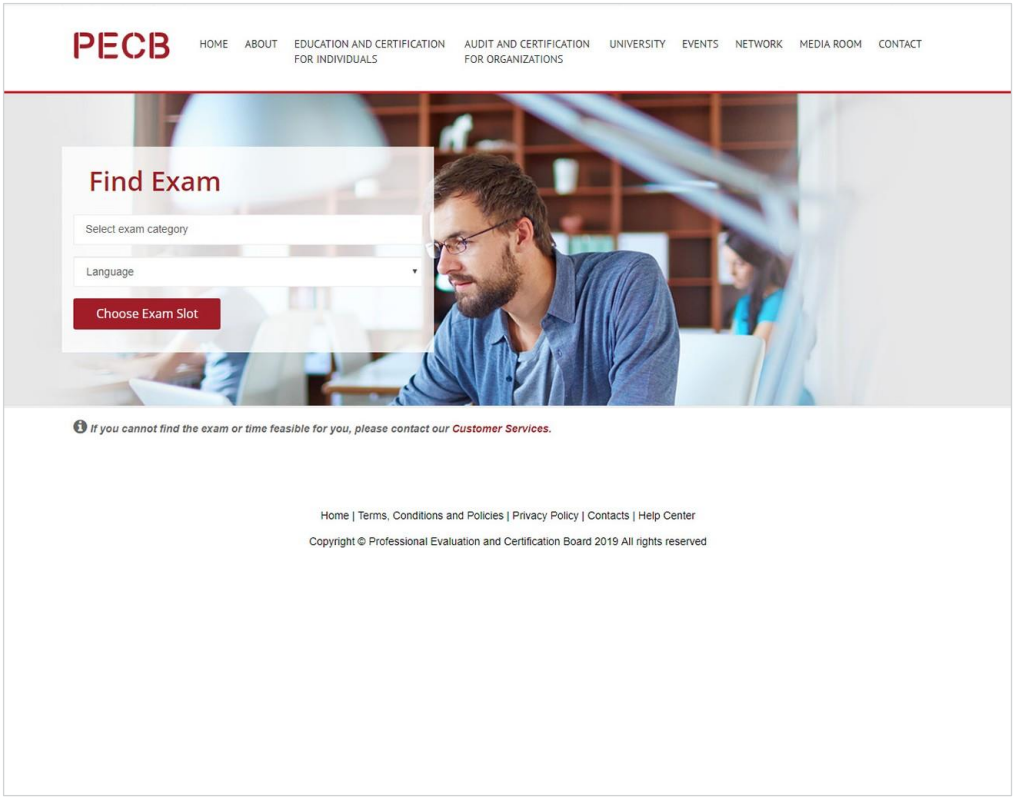
Tim Rama
Managing Director

Sample

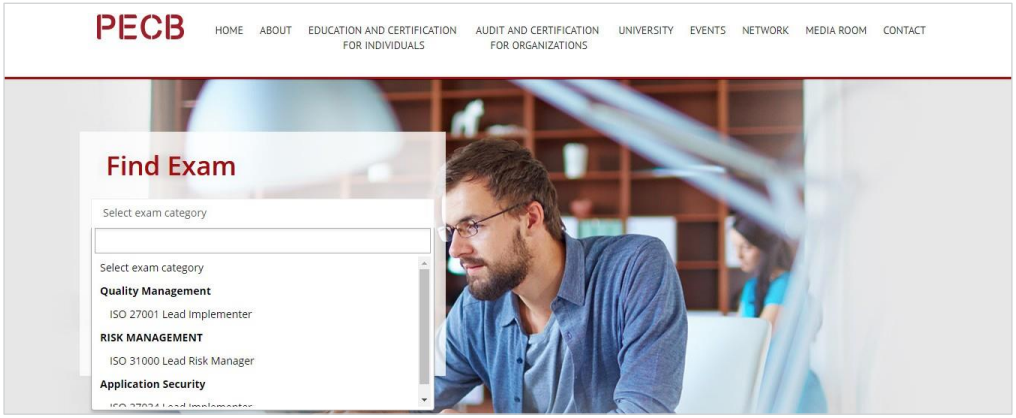
1. Login with your "PECB account" credentials;



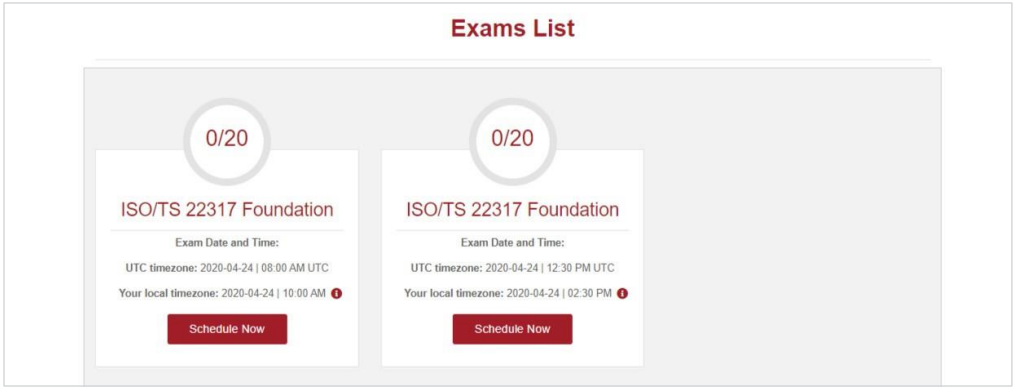
2. Go to PECB Exam Events; https://pecb.com/en/eventExamList/schedule



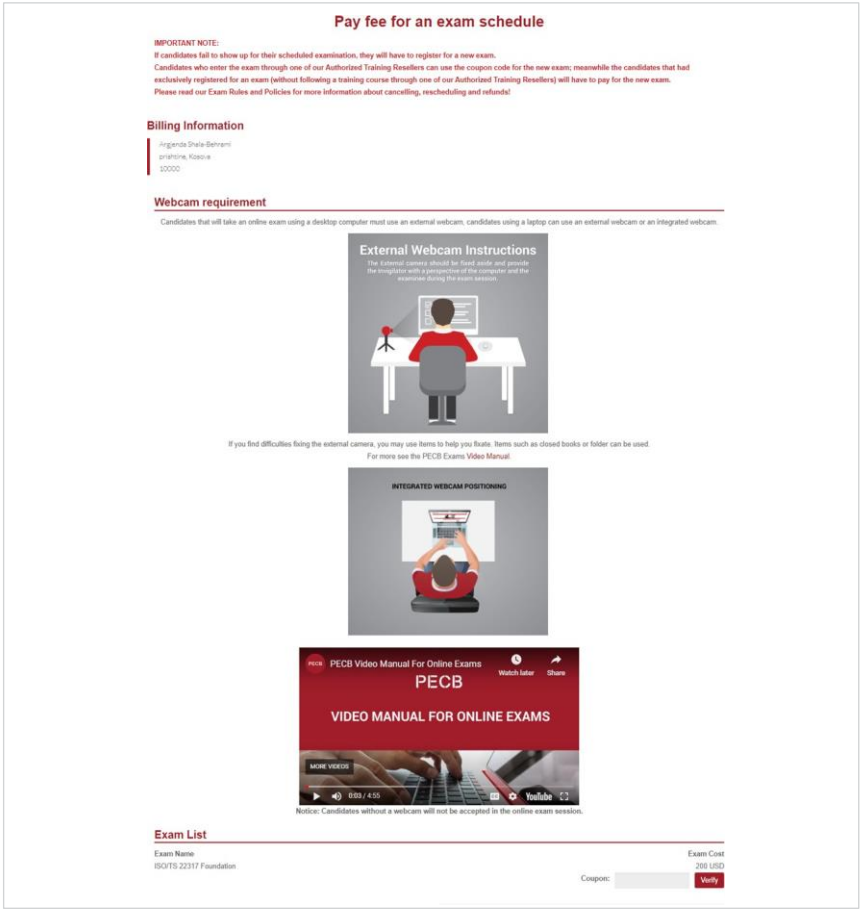
3. Find your exam scheme and convenient time, and click "Schedule Now";



4. At the exam list, click "Schedule Now" at the convenient time slot;



5. Use the coupon code provided by the PECB Course Organizer to waive the scheduling fee;



Note that the candidate when taking an online exam having a web camera is a mandatory step, Without the web-camera, the remote PECB invigilator will not accept examinees in the exam session.

1. Once the seat is confirmed, you will receive a notification from the PECB System;

Hello

We are pleased to inform you that your exam schedule application has been approved. The information regarding this schedule is as follows:

EXAM: ISO/IEC 27032 Lead Cybersecurity Manager

DATE: 2017-07-28 **Time Zone:** UTC

TIME: 01:00 PM to 04:00 PM

Please make sure to download and install the Online Examination Tool (PECB Exams) at least 24 hours before the exam. It can be downloaded from this link: https://pecb.com/pecbexams/.

You need to have an **external, stand-alone webcam**, as internal (built-in) webcams are not accepted. If you do not have an external webcam, you will be terminated from the exam session.

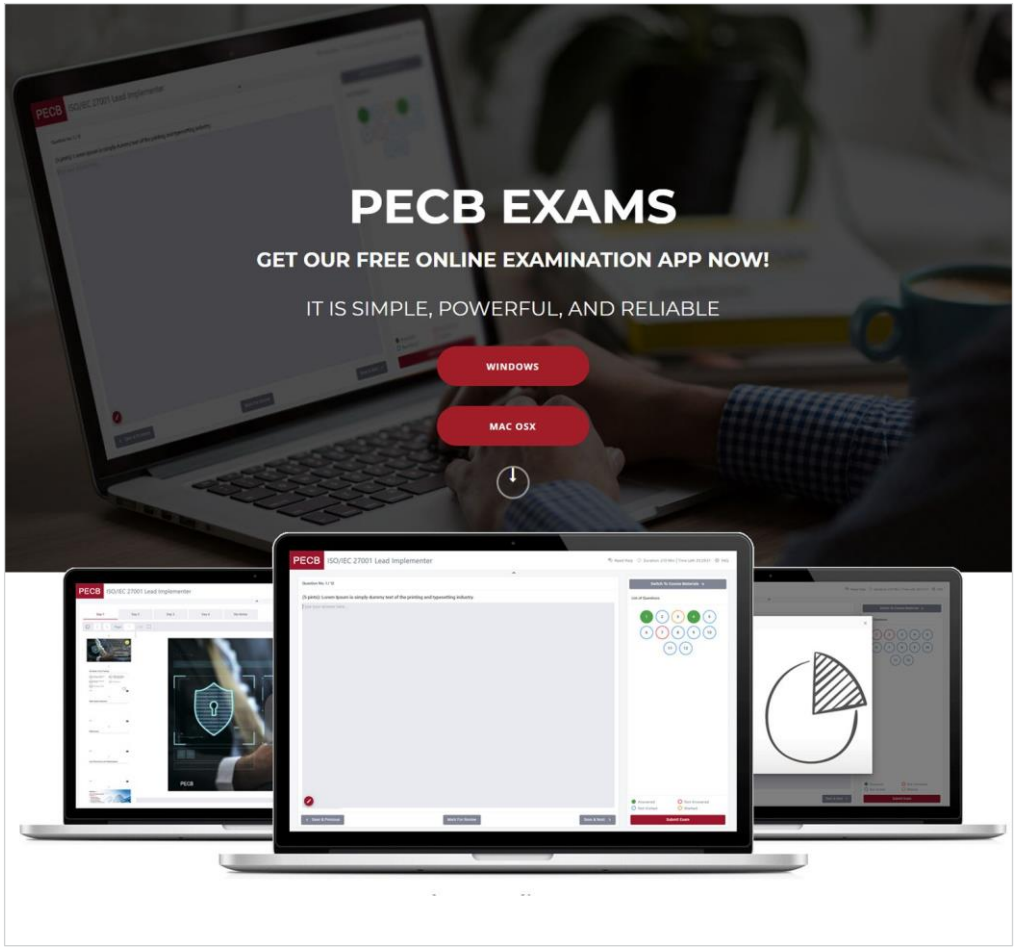
Also, please login to the system (PECB Exams) 30 minutes before the beginning of the exam, so you can be authorized by our invigilator to take the exam. The invigilator will validate if the exam profile matches your present profile.

For any difficulties, please contact us at https://www.pecb.com/customer or our Help Center: Link

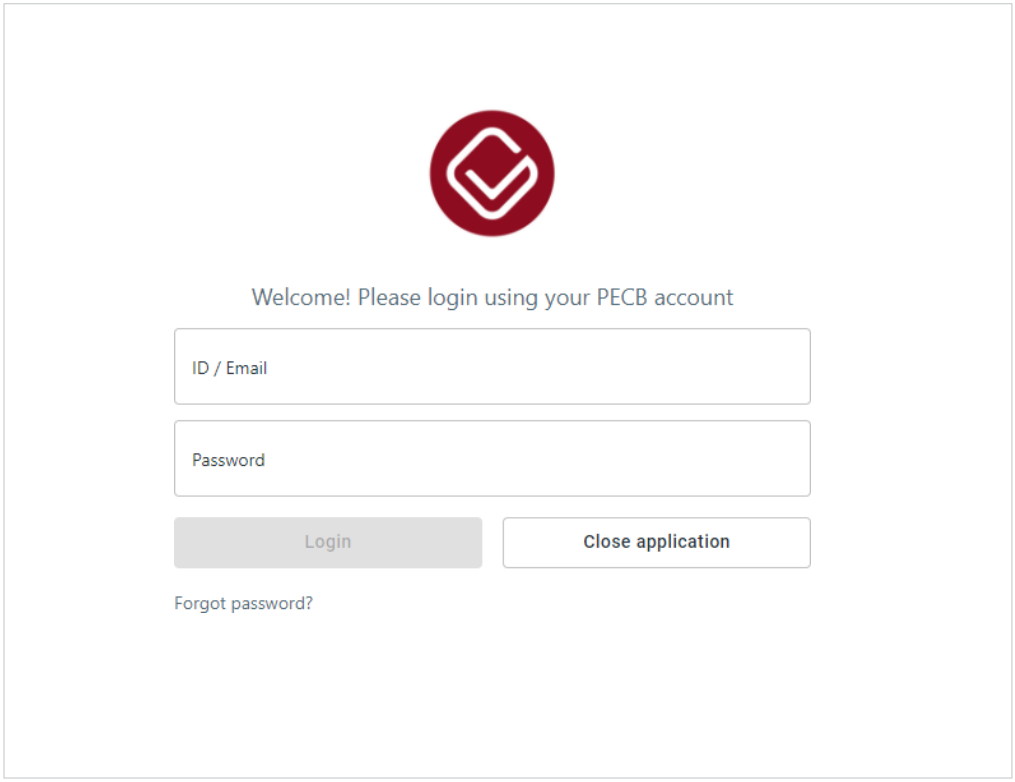
We wish that you pass with flying colours.

PECB

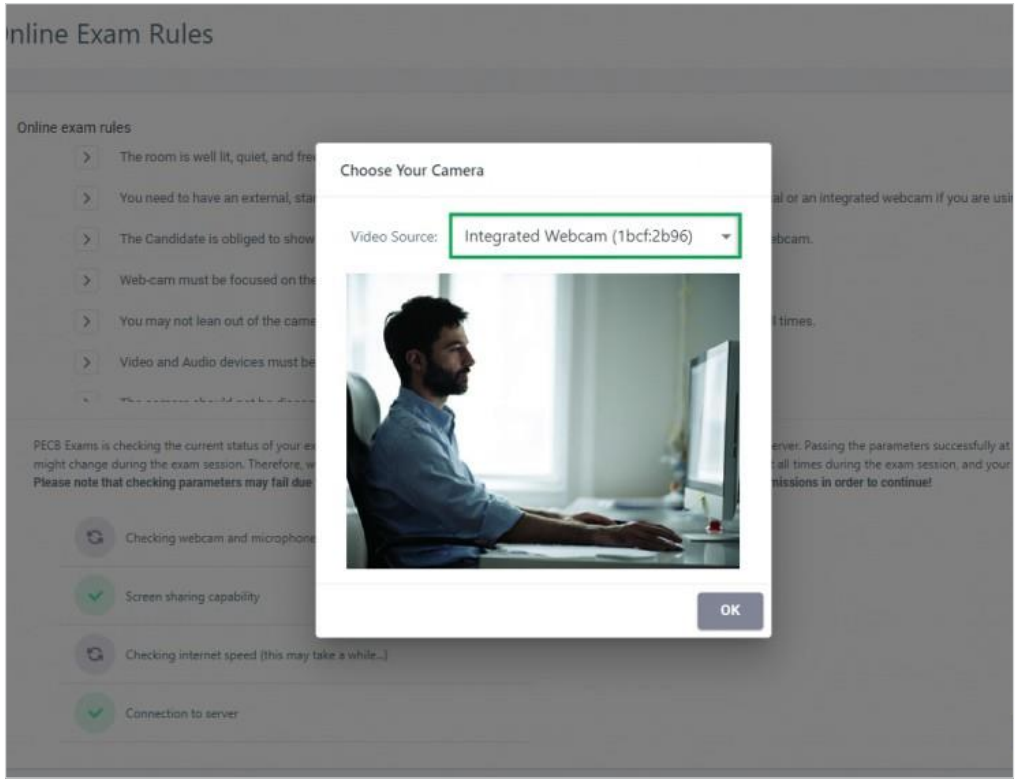
2. The notification will also contain a PECB Exams Application Download link; https://pecb.com/pecbexams/



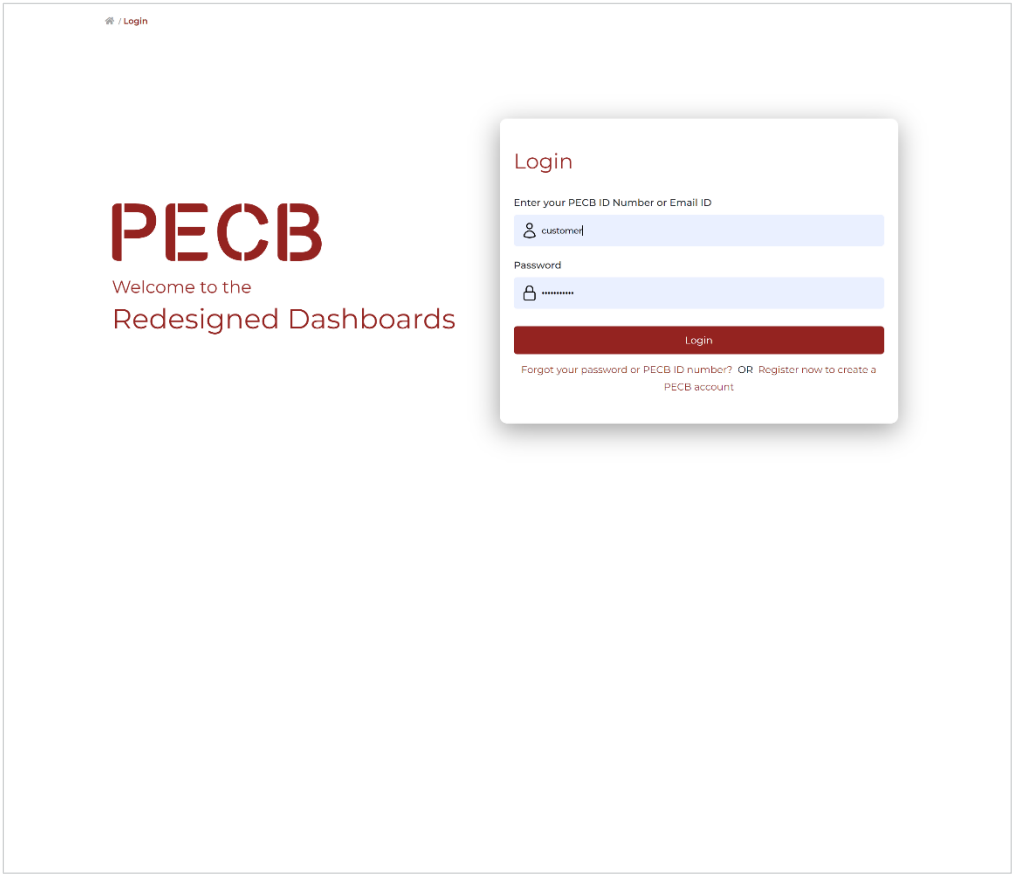
3. Download the application and login with your PECB account credentials 30 minutes before the exam start time;



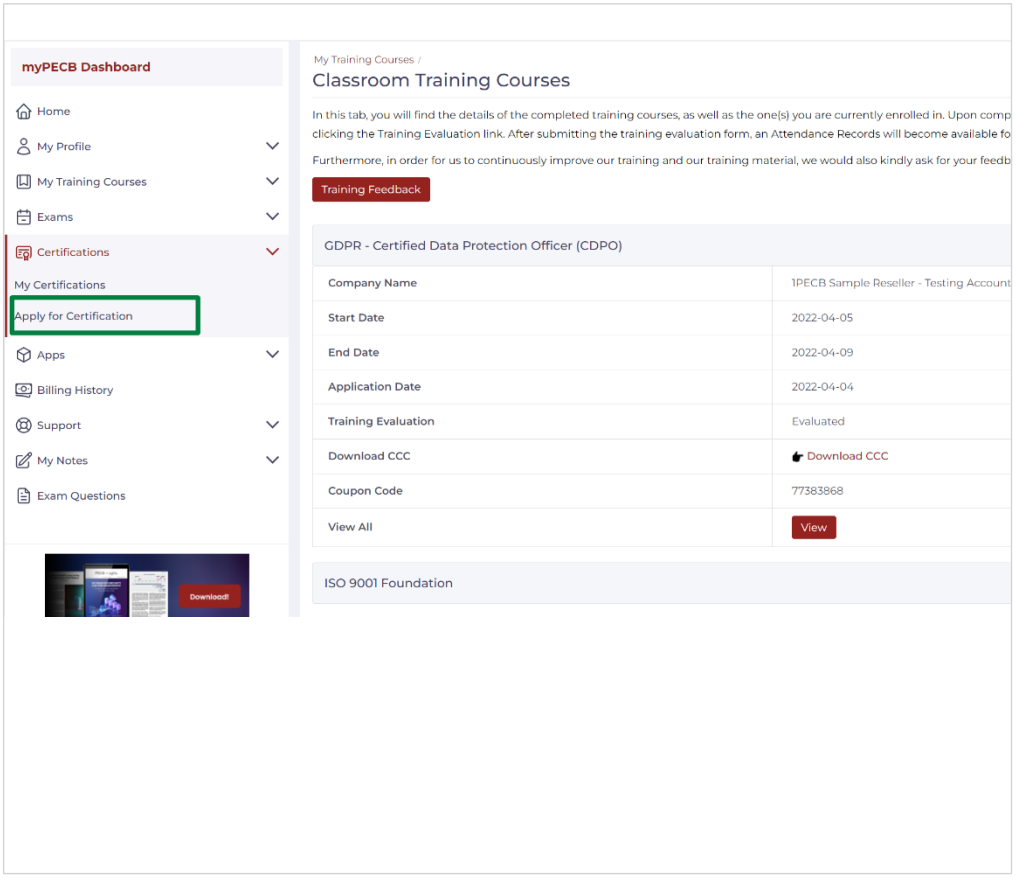
4. A remote PECB Invigilator will verify your Identity and enroll you in the session;



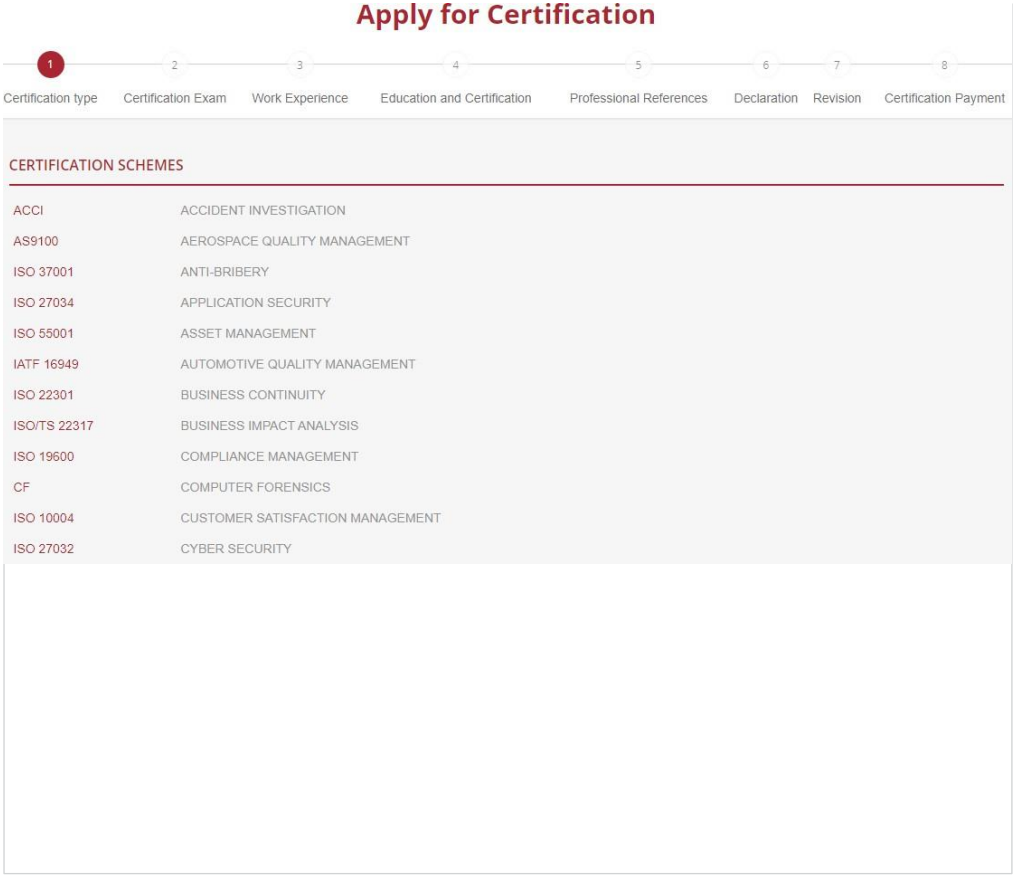
1. Login with your "PECB account" credentials;



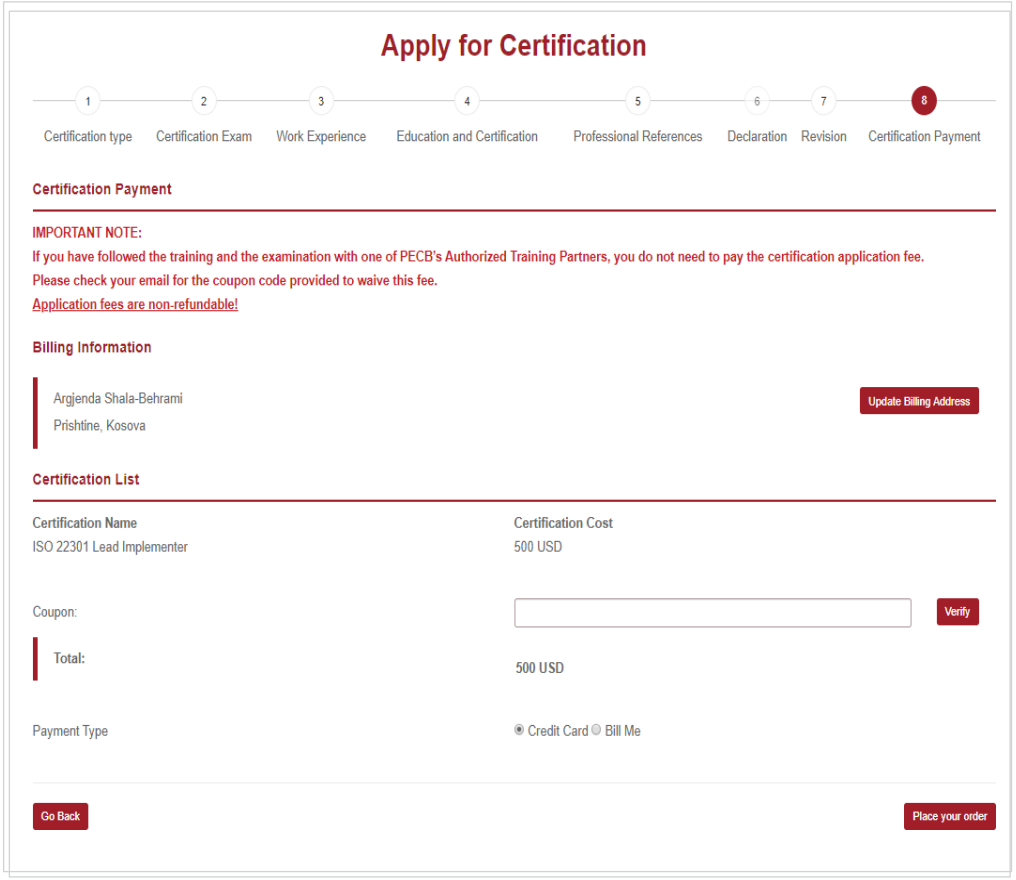
2. Click the "Apply for Certification" tab;



3. Fill in the required information to submit the application;



4. Use the coupon code sent by the PECB Partner to waive



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