



# INSTRUCTIONS FOR THE CALSA SAGA MEMBER PORTAL & SECURITY OFFICER TRAINING DATABASE

<b>Member Portal Views &amp; Authorizations</b>	2
Authorized Users	2
Instructors	3
<b>Profiles</b>	4
Merging Duplicate Instructor Profiles	4
Locating an Instructor ID	4
Creating Officer Profiles	5
Locating an Officer ID	5
Entering and Updating Guard Card Expiration	5
Transferring Officer Profiles	5
<b>Creating Certificates</b>	
Creating Single Certificates	6
Creating Multiple Certificates	6
Editing & Printing Certificates	7
Deleting Certificates	7
Creating Custom Course Names	7
Creating Certificates for Firearms, Baton and/or Chemical Agents	8
Giving an Officer Access to his Certificates	9
<b>Training Materials</b>	
Purchase Security Officer Training	10
Purchase Sexual Harassment Training	11
Tips & Reminders for Sexual Harassment Training	11
Generate Sexual Harassment Training Reports	11

**Database Questions or Comments?**  
[Request Database Assistance](#)

# **Member Portal Views & Authorizations**

## **Authorized Users**

Each company can designate up to four individuals as Authorized Users. In the CALSAGA Member Portal Authorized Users have access to all four tabs: Membership Profile, Instructors & Courses, Officers & Certificate, Training



Authorized Users can:

- Edit the Membership Profile
- Pay Membership Dues
- Create and Merge Instructor Profiles
- Create a Custom Course Name
- Create Officer Profiles
- Create Certificates
- Purchase Training
- General Sexual Harassment Training Reports

Authorized Users cannot:

- Delete an Officer Profile
- Delete Officer Training Records

## **Authorized Users Who Are Also Instructors**

Authorized Users have the ability to create officer profiles and training certificates; creating a second set of access credentials under the Instructors & Courses tab is not necessary. Should an Authorized User's name need to appear on a training certificate in the training field, an Instructor Profile may be created with first and last name only; the username and password fields should be left blank.

\*Please note that if Instructor access is created with the same email addressed listed for an Authorized User, log in will fail. In that case you can [Request Database Assistance](#)

## **Make a Dues Payment**

Only Authorized Users have the ability to make a dues payment through the Member Portal.

- Under the Membership Profile tab click View Invoice on the left side.
- In the new window that opens with the invoice click Pay with Card.

# Instructors

Companies can set up Instructor access for trainers or those who create training certificates. Instructors have access to only the Instructors & Courses, Officers & Certificates tabs



\*Please note that some names may appear in your list of Instructors that do not work for your company. This means that that trainer is listed on a certificate for training that one of your officers received prior to that officer working for your company. You can [Request Database Assistance](#) with a list of instructors to be deleted from your list.

## List Instructors



Instructors can:

- Create Instructor Profiles
- Create a Custom Course Name
- Create Officer Profiles
- Create Certificates

Instructors cannot:

- Edit the Membership Profile
- Pay Membership Dues
- Merge Instructor Profiles
- Purchase Training
- Delete an Officer Profile
- Delete Officer Training Records
- General Sexual Harassment Training Reports

# Profiles

## Merging Duplicate Instructor Profiles

Instructor records may have duplicates; profiles can be merged by an Authorized User.

- Click the Officers & Certificates tab.
- Enter a full or partial name in the Search Officers box. Click Search
- Check the profiles that you would like to merge.
- Click Merge Checked. Click Save

\*Please note there is no undo option for merged profiles.

Need assistance with merging profiles? [Request Database Assistance](#)

INSTRUCTOR ID	INSTRUCTOR NAME	EMAIL/LOGIN	PASSWORD
<input checked="" type="checkbox"/> 11736	Kate Wallace	kate	abcdefg
<input checked="" type="checkbox"/> 12479	KWallace		
<input checked="" type="checkbox"/> 12480	Kate W		

## Locating an Instructor ID

- Click the Instructors & Courses tab.
- Enter the instructor's name in the Search Instructor field and click Search.
- The Instructor ID appears to the far left

INSTRUCTOR ID	INSTRUCTOR NAME	EMAIL/LOGIN	PASSWORD
<input type="checkbox"/> 11736	Kate Wallace	kate	12345

# Transferring Officer Profiles

The CALSAGA Security Officer Training Database allows members to transfer officer profiles so that no officer training records are lost. In order to transfer an officer's profile, trainers must have the officer's full name and date of birth.

- Click the Officers & Certificates tab.
- Under Search Officers: ALL CALSAGA enter the officer's last name and date of birth. Click Search.
- Check the box to the left of the officer's ID number and click Move to [Company Name].

OFFICER ID	GUARD CARD	PREFIX	FIRST NAME	MIDDLE NAME	LAST NAME	SUFFIX	BIRTH DATE	EMAIL/LOGIN	PASSWORD
<input checked="" type="checkbox"/> 159509			Elizabeth		Jones		1989-08-06		

# Creating Officer Profiles

- Click the Officers & Certificates tab.
- In the New Officer Box enter the officer's first and last name and date of birth. Click Create.
- On the next screen enter the officer's date of birth and guard card (optional). Click Save. A green Success message will appear in the bottom left corner.

# Locating an Officer ID

- Click the Officers & Certificates tab.
- Enter the officer's name in the Search Officer field and click Search.
- The Officer ID appears to the far left.

OFFICER ID	GUARD CARD	PREFIX	FIRST NAME	MIDDLE NAME	LAST NAME	!
<input type="checkbox"/> 158870	12345678		Amy		Morris	

# Entering and Updating Guard Card Expiration

- Click the Officers & Certificates tab.
- Select the officer from the List of Officers and click Edit.
- Enter the Guard Card expiration date and click Save.  
\*Please note that this field must be manually updated. The Department of Consumer Affairs does not permit our system to interface with BreZEz.

# Creating Certificates

## Create a Single Certificate for one Officer

- Click the Officers & Certificates tab.
- Select the officer from the list of officers on the left side and click Create Certificate.  
\*Please note that if your company has more than 1,000 officer profiles, it is more efficient to enter the officer's name in the Search Officer field and click Search. To create a certificate, click the blue Create Certificate icon on the far right.
- Fill in all fields and click Save. A green Success message will appear in the bottom left corner. Either close the window or click the Officers & Certificates tab to return to

## Create Multiple Certificates for One Officer or Multiple Officers

\*Please note that prior to starting this process, you will need both the Officer's ID and Instructor's ID. See below for information on obtaining those ID numbers.

- Click the Officers & Certificates tab.
- Under New Certificate click Create Multiple.
- Holding down the Control key on your keyboard, select all courses that you are entering. Click Next.






### Select one or more Courses



- Fill in all fields and click Save.
- Enter the officer's ID and guard card (optional). Click Add.
- If you are creating certificates for multiple officers, continue adding each officer's ID and clicking add.
- Review the certificate information under Preview Certificates. Click Create Certificates.

# Editing & Printing Certificates

- Click the Officers & Certificates tab.
- Select the officer from the list of officers on the left side and click View.  
\*Please note that if your company has more than 1,000 officer profiles, it is more efficient to enter the officer's name in the Search Certificate field and click Search.
- To edit a certificate, click the serial number under the Certificate column. To save or print a certificate click the double square to the left of the serial number.

CERTIFICATE	OFFICER ID	OFFICER NAME	COURSE NAME
 dbd473de61	158870	Amy Morris	ABC TEST COMPANY
 ee03612bc6 ✓	158870	Amy Morris	I B. Weapons of Mass Destruction (WMD) & Terrorism Awareness ABC TEST COMPANY
 bf92ed5cd4 ✓	158870	Amy Morris	II C. Communication and its Significance ABC TEST COMPANY
 06ffb8c9b6 ✓	158870	Amy Morris	III G. Trespass ABC TEST COMPANY
 450447c61d ✓	158870	Amy Morris	III M. Preserving the Incident Scene ABC TEST COMPANY

\*Please note that reprints of certificates from 2016 and earlier may have formatting issues. [Request Database Assistance](#) and our team can provide support.

# Deleting Certificates

To protect training records, neither Instructors nor Authorized Users have the ability to delete records. If a certificate has been created in error, [Request Database Assistance](#) to have it deleted.

# Creating a Custom Course Name

- Click on the Instructors & Courses tab.
- Enter the custom course name in the New Course field and click Create.
- The newly created Custom Course Name will appear in the dropdown menu of course names on the certificate creation screen. Custom Course names appear at the bottom beneath the list of Official CALSAGA Courses.

# Creating Certificates for Firearms, Baton and/or Chemical Agents

In order to create certificates your company must have a valid TFF and/or TFB certificate number.

- [Request Database Assistance](#) for the ability to create certificates for firearms, baton and/or chemical agents.
- You will receive a confirmation email letting you know once the process has been completed. Once completed, you will be able to follow the steps listed above under the Create Certificates heading.
- The Weapons Courses will appear at the bottom of the dropdown menu of course options.

## Official CALSAGA Courses

- I A. Powers to Arrest
- I A. Powers to Arrest / I B. Weapons of Mass Destruction (WMD) & Terrorism Awareness
- I B. Weapons of Mass Destruction (WMD) & Terrorism Awareness
- II A. Public Relations (Community & Customer)
- II B. Observation & Documentation
- II C. Communication and its Significance
- II D. Liability / Legal Aspects
- III A. Post Orders & Assignments
- III B. Employer Policies / Orientation
- III C. Evacuation Procedures
- III D. Officer Safety
- III E. Arrests, Search & Seizure
- III F. Access Control
- III G. Trespass
- III J. Handling Difficult People
- III K. Work Place Violence
- III M. Preserving the Incident Scene
- III N. Crowd Control
- III O. Driver Safety
- III P. Supervision
- III Q. Courtroom Demeanor
- III R. Parking / Traffic Control
- III S. Radio Procedures

## Optional Weapons Courses

- III L. Chemical Agents
- III T. BSIS's Certified Course in Firearms Training
- III X. Annual Firearms Requalification

\*Please note that the Create Multiple Certificates option (see page 6) can be used to create certificates for one course for multiple officers. This process cannot be used to create multiple certificates for different weapons or calibers in a single process.

# **Giving an Officer Access to his Certificates**

The CALSAGA Security Officer Training Database provides an optional feature that will allow officers to log in to save or print certificates. Officers do not have the ability to edit certificates or profile information. Upon log in, officers will see only a list of training records.

- Click the Officers & Certificates tab.
- Select the officer from the list of officers on the left side and click Edit.
- Complete the Email/Login and Password fields. Click Save. A green Success message will appear in the bottom left corner.

## **Officer Permissions**

Officers can:

- View, Download and Print his or her Certificates

Officers cannot:

- View the Membership Profile or Instructors & Courses tab
- Delete or Edit Certificates
- Create Certificates
- View Other Officer Profiles or Certificates
- Create Certificates

# **Training Materials**

## **Purchase Security Officer Training Materials**

CALSAGA AB 2880 Training Materials are only available for purchase by current CALSAGA members. The training was designed for classroom training but can be used as you see fit/as the law permits (on post training, self-study, etc.).

Each module contains four files in PDF format: Electronic Textbook, Instructor's Presentation, Test, Answer Key

- Click the Training tab.
- Under the CALSAGA Training Modules header select Purchase Training courses.
- Review the Terms of Use, End User License Agreement, Disclaimer, and Release of Liability for CALSAGA Training Materials.

\*Please note that acceptance of the terms and agreement is required in order to purchase.

- Enter payment information and select Pay.
- You may elect to download the modules all at once or individually.

## **Purchase School Security Officer Training Materials**

CALSAGA School Security Training Materials are only available for purchase by current CALSAGA members. The training was designed for classroom training but can be used as you see fit/as the law permits (on post training, self-study, etc.).

Each module contains four files in PDF format: Electronic Textbook, Instructor's Presentation, Test, Answer Key

- Click the Training tab.
- Under the CALSAGA School Security Modules header select Purchase Training courses.
- Review the Terms of Use, End User License Agreement, Disclaimer, and Release of Liability for CALSAGA Training Materials.

\*Please note that acceptance of the terms and agreement is required in order to purchase.

- Enter payment information and select Pay.
- You may elect to download the modules all at once or individually.

## Purchase Sexual Harassment Training

Sexual Harassment Training is compatible with computers, tablets and mobile devices on all browsers except Internet Explorer.

- Click the Training tab.
- Under the Sexual Harassment Training header select Purchase Interactive Online Training.

\*Please note that Employee and Supervisor Training purchases need to be made in two separate transactions.

- Enter the number of training sessions you would like to purchase and click Next.
- Complete the Name and Company fields and Click Pay with Card.
- Enter payment information and select Pay.
- The purchaser will receive an email with the session keys to disseminate to employees.

\*Please note that each key is unique to the employee and may not be shared amongst employees.

- Upon completion of the training the purchaser will receive a certificate of completion which satisfies the requirements of SB 1343.

## Tips and Reminders for Sexual Harassment Training

Please share this information with your staff when assigning Sexual Harassment Training.

- [Access and Unlock Sexual Harassment Training](#)
  - The individual will need their personal Unlock Key and will be required to enter their first and last name.
- Internet Explorer and Microsoft Edge are not supported platforms for our Sexual Harassment Training. Google Chrome is recommended.
- Because the training contains multiple video files, adequate wi-fi or data signal strength is needed; similar to that needed to stream Netflix.
  - If the training stalls or freezes, wi-fi or data signal is likely the culprit. Once adequate service resumes, the user should restart the browser and will be able to resume the training.
- Training can be completed on a computer, tablet or smart phone.
  - Please keep in mind that if your company allows employees to complete the training on a cell phone or other personal device, cell phone reimbursement should be provided.

## Generate Sexual Harassment Training Reports

- Click the Training tab.
- Under the Download History header there are the options to Download All Training, Download Completed Training and Download Incomplete Training

\*Please note that only purchases made with an email address matching an email address listed for an Authorized User in the Membership Profile will show in the reports. Up to four Authorized Users may be added. Additional Authorized Users may be added in the Membership Profile by clicking New User.