

Custom Categories: The Best Practices

We've listed a few custom category best practices below, along with information on your recommended course of action. Note: "your courses" refers to your Company Specific Parent courses.

Consider how you'll manage your categories

Recommended: Manage your categories centrally

- **Pros:** One person manages everything, company-wide consistency in facilitation and reporting
- **Cons:** Individual locations have specific needs which may not be met

Manage your categories Locally

- **Pros:** Each location is responsible for their own categories, locations can opt in or out of using custom categories, highly personalized
- **Cons:** Inconsistencies in naming can lead to difficulty with reporting and Learning Plans

Use good naming conventions

Use clear, broad, location-specific names

This creates consistency and ease in reporting, Learning Plans, eLearning, and facilitation.

- ✓ **ATX Safety Standards**
- ✓ **STL Safety Standards**
- ✓ **CORP Professional Development**

Avoid duplicate, unclear, overly narrow names

This can create confusion with reporting, Learning Plans, eLearning, and facilitation.

- X Workplace Safety (duplicates Alchemy category)
- X My Courses (unclear)
- X ATX Line 1, Pos 3, 2nd Shift Training (too narrow)

Use good category etiquette

Custom category DO'S:

- DO: Utilize your company's naming convention
- DO: Minimize the number of categories you build
- DO: Ask permission before moving your courses into someone else's category
- **DO: COMMUNICATE CATEGORY CHANGES TO ALL AFFECTED LOCATIONS**

Custom category DON'TS:

- DON'T: Edit another location's category
- DON'T: Build a lot of small categories

A few more considerations:

- **Brush up on Parent / Child course concepts.** All Alchemy courses are comprised of a Parent (topic) and Child (content, the course itself), and Parents can have more than one Child. Use case: a Parent with equivalent English and Spanish language courses.
- **You can choose to prevent admins from moving your courses into Alchemy categories.** Have your corporate Alchemy contact reach out to Alchemy Support to turn off this option.
- **Category changes will be visible in Player 7. If you have Player 6,** take advantage of this opportunity to plan out your categories ahead of time!

Custom Categories: The Rules

Please review the following rules around adding custom categories – this will ensure that all who access your courses will be able to find them during facilitation, reporting, and eLearning.

Rules	Considerations
Only Category Editors and Diamond Admins can build, edit, and delete custom categories	New roles in Alchemy Manager: Category Editor and Diamond Admin For most clients, persons with the 'Customer Admin' role in Alchemy Manager are automatically given the 'Category Editor' role, though companies can opt out of this. Diamond admins have access to all Worksites, Learning Plans, courses, and categories. Customer and Diamond Admins can assign the Category Editor role to others.
Only Company Specific Courses go into custom categories	Observations and stand-alone Tests and Evaluations cannot be moved You can only move courses that you have access to; if you need to move a course and do not have access to it, please contact your main Alchemy administrator to request that the course be assigned to your Worksite.
Custom categories can be locked	Only the category owner and the Diamond Admin can edit a locked category If a category is <u>not</u> locked, Manager Admins can move courses into and out of that category (Category Editor role not required). The category owner is the Category Editor or Diamond Admin who originally built the custom category.
You must have access to a course to move it	Only Diamond Admins can move courses that belong to other Worksites If you need access to a course, please contact your main Alchemy administrator and ask them to assign the course to your Worksite.
Company Specific Courses can go to Alchemy categories	This option is turned off by default Make sure to communicate category changes to everyone who would be impacted by this change, including other worksites with access to the courses being moved.
Related courses must be moved together	Child courses cannot be split across categories As a reminder, all Alchemy courses are comprised of a Parent (topic) and Child (content, the course itself). Parents can have more than one associated child course, and all of these components must be moved together.
If you have access to a course, you will see the category it is in	Communicate category changes to your facilitators and admins Adding a widely available course to your custom category will make your category visible to your company's other locations. It will also change how others access the course while facilitating, reporting, training online, and organizing training goals.
Deleting a category does NOT delete its courses	Orphaned courses go back to the Company Specific category If you delete a category that contains courses, then the courses will be reassigned to the Company Specific category. If you would like to disable a category and its courses, you'll need to additionally archive all of the courses. Only people with the Category Editor role can delete a category.



Questions? Contact Alchemy Support at 1-888-988-8832 or support@alchemy systems.com