



D A M S T R A

Manage Worker
Training Record

Safety



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Manage Training

Introduction

Damstra Safety provides powerful tools to identify, schedule and track Training requirements for People across your Organisation, based on Position and individual needs.

The procedure for managing the Training record of an individual Worker is identical across all Person types, namely:

- Workers
- Contracted Workers
- Other Person Types your Organisation may have enabled in Settings

In this guide, we'll show the procedure using a Worker.

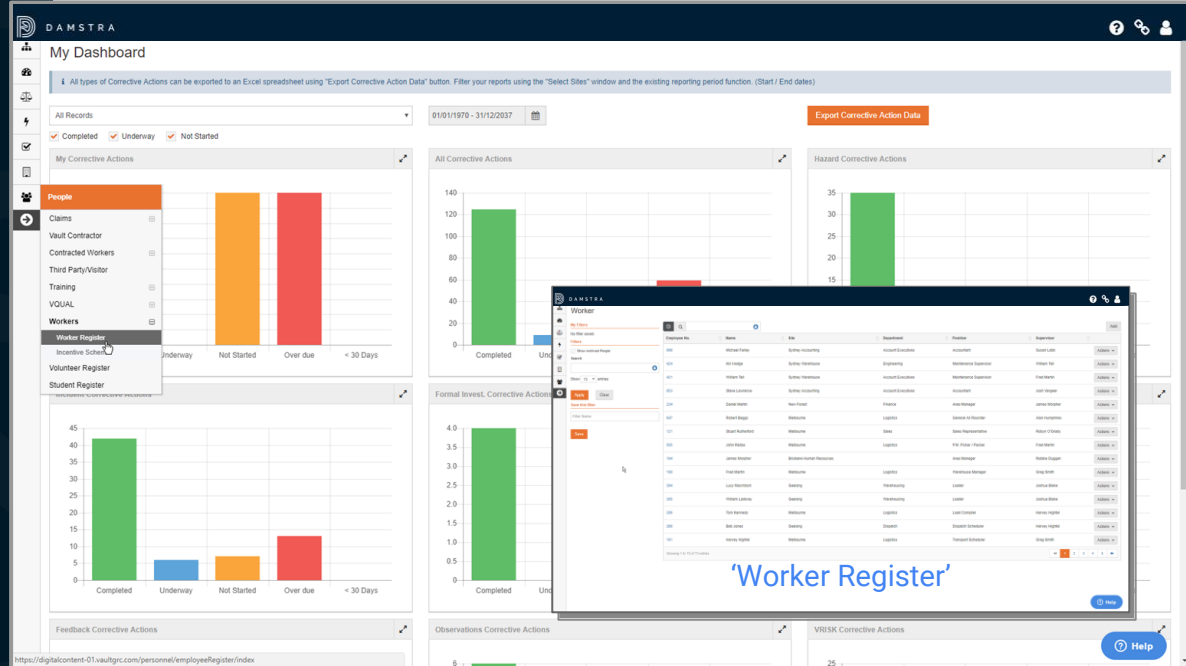
Workers

Contracted Workers

Other Person Types

Manage Training Introduction

The *Worker Register* is found under *People* in the Menu Bar.



Manage Training

Edit Worker

Locate the Worker involved by searching the Worker Register.

Once found, **click** 'Actions', then 'Edit'.

Then, **click on** the *Training* tab.

The image shows two overlapping screenshots of the DAMSTRA system interface. The background screenshot displays the 'Worker' register with a search bar containing 'Michael Farley'. A table lists worker details, and an 'Actions' dropdown menu is open, highlighting the 'Edit' option. The foreground screenshot shows the 'Edit Worker - 908 - Michael Farley' page, with the 'Training' tab selected in the top navigation bar. The page contains various fields for worker information, including Employee No., First Name, Last Name, Sex, Injury Status, RTW, Email Address, Add Job Description, Site, Department, Position, Shift, and Supervisor.

Worker Register Table:

Employee No.	Name	Site	Department	Position	Supervisor
908	Michael Farley	Sydney Accounting	Account Executives	Accountant	Susan Lobb

Edit Worker - 908 - Michael Farley Fields:

- Employee No.: 908
- First Name: Michael
- Last Name: Farley
- Sex: Male
- Injury Status: Fully Fit
- RTW: [Empty]
- Email Address: mfarley@abcond.au
- Add Job Description: [Empty]
- Site: ABC Group → ABC Industries Australia → New South Wales → Rydalmere → Finance → Sydney Accounting
- Department: Account Executives
- Position: Accountant
- Shift: Day 8-5
- Supervisor: Susan Lobb

Manage Training

Unique Student Identifier

If your Worker has a unique student identifier, such as an NZQA NSN Number, **enter** this into the '*Unique Student Identifier*' field.

Worker / Edit Worker - 908 - Michael Farley

Worker Details Governance Inductions Licences **Training** PPE Medical Reviews / Notes Contact Details Related

Unique Student Identifier

Training Record

ID	Course Name	Course Code	Start Date	End Date	Expiry Date	Licence	Passed Course	Score	File	Actions
9670	Fork Lift Truck Certification	FLT 1	18/07/2018	18/07/2018	18/07/2021				No file	Actions
9863	Safe Operating Procedur...	SOP101	07/04/2016	07/04/2016	07/04/2018		Yes	89	No file	Actions
9849	Advanced Word Refresher	ADVWRDR	11/06/2018	12/06/2018	12/06/2019				No file	Actions
9630	Project Management	PROJMG1	10/07/2017	10/07/2017	10/07/2018		Yes	82	No file	Actions
9803	Fair Work Act	FWA	25/06/2018	25/06/2018	25/06/2020				No file	Actions
9802	Fair Work Act	FWA	19/01/2016	19/01/2016	19/01/2018		Yes	100	No file	Actions
9799	Conflict Management	CONMGMT	16/07/2018	20/07/2018	20/02/2020				No file	Actions
9798	First Aid	FRSTAD	22/01/2018	22/01/2018	22/01/2020				No file	Actions
9797	Advanced Excel	MS_XLS	01/05/2018	02/05/2018	02/05/2019				No file	Actions
9796	Advanced Word	ADVWRD	20/01/2017	20/01/2017	20/01/2018		Yes	97	No file	Actions

Show 10 entries | Showing 1 to 10 of 12 entries

Training Status

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	■	No Training Required
Project Management (PROJMG1)	10/07/2018	■	No Training Required

Manage Training Training Record

The *Training Record* section allows us to:

- Assign the Worker as an Attendee for an already-scheduled Training Course
- Assign the Worker to undertake a non-scheduled Training Course (for example, a self-paced module)

Or

- Record the outcome of a Training Course that the Worker has already undertaken

The table shows Training Courses that the Worker is already scheduled to attend, or has attended in the past, along with the outcome of that Course.

The screenshot shows the 'Worker / Edit Worker - 908 - Michael Farley' page in the DAMSTRA system. The 'Training' tab is selected. Below the 'Unique Student Identifier' field, the 'Training Record' section displays a table of training courses. The table has columns for ID, Course Name, Course Code, Start Date, End Date, Expiry Date, Licence, Passed Course, Score, File, and Actions. The table lists 12 courses, with the first 10 visible. The 'Passed Course' column shows 'Yes' for courses 9803, 9802, 9799, and 9796, and 'No' for the others. The 'Score' column shows scores for courses 9803 (89), 9802 (100), and 9796 (97). The 'File' column shows 'No file' for all courses. The 'Actions' column has a dropdown menu for each course. Below the table, the 'Training Status' section shows a table with columns for Course Name, Expiry Date, Status, and Actions. It lists two courses: 'Safe Operating Procedures 101 (SOP101)' and 'Project Management (PROJMG7)'. The 'Status' column shows a red square for the first course and a green square for the second. The 'Actions' column has a dropdown menu for each course. The 'Add' button is visible in the top right corner of the 'Training Status' section.

ID	Course Name	Course Code	Start Date	End Date	Expiry Date	Licence	Passed Course	Score	File	Actions
9870	Fork Lift Truck Certification	FLT 1	18/07/2018	18/07/2018	18/07/2021				No file	Actions
9863	Safe Operating Procedur...	SOP101	07/04/2016	07/04/2016	07/04/2018		Yes	89	No file	Actions
9849	Advanced Word Refresher	ADVWRDR	11/06/2018	12/06/2018	12/06/2019				No file	Actions
9830	Project Management	PROJMG7	18/07/2017	18/07/2017	18/07/2018		Yes	82	No file	Actions
9803	Fair Work Act	FWA	25/06/2018	25/06/2018	25/06/2020				No file	Actions
9802	Fair Work Act	FWA	19/01/2016	19/01/2016	19/01/2018		Yes	100	No file	Actions
9799	Conflict Management	CONMGMT	16/07/2018	20/07/2018	20/02/2020				No file	Actions
9798	First Aid	FRSTAD	22/01/2018	22/01/2018	22/01/2020				No file	Actions
9797	Advanced Excel	MS_XLS	01/05/2018	02/05/2018	02/05/2019				No file	Actions
9796	Advanced Word	ADVWRD	20/01/2017	20/01/2017	20/01/2018		Yes	97	No file	Actions

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	Red square	No Training Required
Project Management (PROJMG7)	18/07/2018	Green square	No Training Required

Manage Training

Assign to Scheduled Course

To assign the Worker to attend an already-scheduled session of a Training Course, **click** 'Add'.

Then, **click** the 'Type' drop-down box and **select** 'Add Scheduled Training'.

The top screenshot shows the 'Worker / Edit Worker - 908 - Michael Farley' page. The 'Training' tab is selected. The 'Training Record' section displays a table with columns: ID, Course Name, Course Code, Start Date, End Date, Expiry Date, Licence, Passed Course, Score, File, and Actions. The table contains three rows of training records. An 'Add' button is highlighted in the top right corner of the table.

ID	Course Name	Course Code	Start Date	End Date	Expiry Date	Licence	Passed Course	Score	File	Actions
9670	Fork Lift Truck Certification	FLT 1	18/07/2018	18/07/2018	18/07/2021				No file	Actions
9863	Safe Operating Procedur...	SOP101	07/04/2016	07/04/2016	07/04/2018		Yes	89	No file	Actions
9849	Advanced Word Refresher	ADVWRDR	11/06/2018	12/06/2018	12/06/2019				No file	Actions

The bottom screenshot shows the same page with the 'Add Scheduled Training' form open. The 'Type' dropdown is set to 'Add Scheduled Training'. The 'Course Name' field is empty. The 'Course Date' field is set to '13/06/2018'. The 'Passed Course' dropdown is set to 'Please Select --'. The 'Course Mark' field is empty. The 'Licence' field is empty. The 'Attach File' button is visible. The 'Save Training' button is at the bottom left.

Manage Training

Assign to Scheduled Course cont.

The *Scheduled Course Register* is now shown which displays details of all Courses currently scheduled for future dates.

Browse or **search** the Register for the required Training Course, then **click** 'Save' to select.

Worker / Edit Worker - 908 - Michael Farley

Worker Details Governance Inductions Licences **Training** PPE Medical Reviews / Notes Contact Details Related

Unique Student Identifier

Training Record

Type Add Scheduled Training

This form only shows future training. To add past training use the Add Manual Training Button

Course Name	Course Code	Date	Description	Location	
Project Management	PROJMG	27/06/2018	How to effectively plan, implement and manage projects.		Save
Office Safety	OS01	12/03/2019	Your safety obligations for yourself and others in the office environment	Room 4	Save
Office Safety	OS01	22/06/2018	Your safety obligations for yourself and others in the office environment	Room 4	Save
Lock Out Tag Out	LOTO	07/07/2018	How to correctly lock out tag out.		Save

Show 10 entries Showing 1 to 4 of 4 entries

Training Status

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	Red	No Training Required
Project Management (PROJMG)	10/07/2018	Green	No Training Required
Office Safety (OS01)	--	Red	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Yellow	No Training Required

Help

Manage Training

Record Training Outcome

We're returned to the Training Record where we can now see the added Training Course.

The record shows key information such as start and end dates.

Once a Training Course has taken place, it's important to update the record with the outcome so that your system remains up-to-date. (**Note:** For online courses delivered via Bracken, your system is automatically updated with the outcome).

To do this, **click** 'Actions' then 'Edit'.

The screenshot shows the DAMSTRA 'Worker' interface for Michael Farley (908). The 'Training' tab is active, displaying a table of training records. The table includes columns for ID, Course Name, Course Code, Start Date, End Date, Expiry Date, Licence, Passed Course, Score, File, and Actions. A list of 13 training records is shown, including Project Management, Fork Lift Truck Certification, Safe Operating Procedures, Advanced Word Refresher, and First Aid. The 'Actions' column for each record contains an 'Edit' button, which is highlighted in the image. Below the table, the 'Training Status' section shows a list of training outcomes, including 'Safe Operating Procedures 101 (SOP101)' and 'First Aid Management (FAM101)', with status indicators (red and green squares) and 'No Training Required' labels. The interface also includes a search bar, filters for 'Show All Courses' and 'Show Uncompleted Courses', and a pagination control showing 'Showing 1 to 10 of 13 entries'.

ID	Course Name	Course Code	Start Date	End Date	Expiry Date	Licence	Passed Course	Score	File	Actions
9871	Project Management	PROJMG	27/06/2018	27/06/2018	27/06/2019				No file	Actions
9870	Fork Lift Truck Certification	FLT 1	18/07/2018	18/07/2018	18/07/2021				No file	Actions
9863	Safe Operating Procedures	SOP101	07/04/2016	07/04/2016	07/04/2018		Yes	89	No file	Actions
9849	Advanced Word Refresher	ADVWRD	11/06/2018	12/06/2018	12/06/2019				No file	Actions
9830	Project Management	PROJMG	10/07/2017	10/07/2017	10/07/2018		Yes	92	No file	Actions
9803	Fork Work Act	FWA	25/06/2018	25/06/2018	25/06/2020				No file	Actions
9802	Fork Work Act	FWA	19/01/2016	19/01/2016	19/01/2018		Yes	100	No file	Actions
9799	Conflict Management	CONMGIT	16/07/2018	20/07/2018	20/07/2020				No file	Actions
9798	First Aid	FRSTAD	22/01/2018	23/01/2018	23/01/2020				No file	Actions
9797	Advanced Excel	MS_XLS	01/05/2018	02/05/2018	02/05/2019				No file	Actions

Showing 1 to 10 of 13 entries

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	Red square	No Training Required
First Aid Management (FAM101)	10/07/2018	Green square	No Training Required

Manage Training

Record Training Outcome cont.

Select whether the Worker Passed the Course, and if so the *Mark* achieved.

If the Worker earned a Licence from the course, **enter** the Licence details.

You may choose to enter this information in the *Licenses* tab of the Worker's record in addition to or instead of using this field.

Worker / Edit Worker - 908 - Michael Farley

Worker Details Governance Inductions Licences **Training** PPE Medical Reviews / Notes Contact Details Related

Unique Student Identifier

Training Record

Course Name First Aid

Type Worker

Name Michael Farley

Passed Yes

Mark 88

Licence

Attach File Add File

Do not alert or escalate

Save Cancel

Training Status

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	1	No Training Required
Project Management (PROJMGT)	10/07/2018	2	No Training Required
Office Safety (OS01)	--	3	No Training Required
Fork Lift Truck Certification (FLT 1)	--	4	No Training Required
First Aid (FRSTAD)	22/01/2020	5	No Training Required
Fair Work Act (FWA)	19/01/2018	6	No Training Required
Display Screen User Awareness (DSEA 1)	--	7	No Training Required

Manage Training

Record Training Outcome cont.

To store a copy of a file relating to the Training, for example a copy of a certification, **click** the 'Add File' button and locate it. A copy will be added to the record. (**Note:** For online courses delivered via Bracke, your system will automatically receive a copy of the certificate).

Tick the 'Do not alert or escalate' checkbox only if you do not want your system to generate escalations when certification nears expiry, e.g. the course has been deprecated or maintaining current certification is no longer required.

Once all mandatory and relevant information has been entered, **click** 'Save'.

The screenshot shows the 'Edit Worker' page for Michael Farley (Worker ID 908). The 'Training' tab is active. The 'Training Record' section contains fields for Course Name (First Aid), Type (Worker), Name (Michael Farley), Passed (Yes), Mark (88), and Licence. There is an 'Add File' button and a checkbox for 'Do not alert or escalate'. The 'Training Status' section displays a table of training courses with their expiry dates, status, and actions.

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	Red	No Training Required
Project Management (PROJMG1)	10/07/2018	Green	No Training Required
Office Safety (OS01)	--	Red	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Yellow	No Training Required
First Aid (FRSTAD)	22/01/2020	Red	No Training Required
Fair Work Act (FWA)	19/01/2018	Yellow	No Training Required
Display Screen User Awareness (DSEA 1)	--	Green	No Training Required

Manage Training

Removing a Training Course

If we made a mistake, or the Worker is no longer required to attend the course, we can easily remove the Training Course for this particular Worker by simply **clicking 'Actions'**, then **'Delete'**.

The Course is removed from the Training Record and the Worker is removed from the Attendees list for the scheduled Course.

The screenshot displays the DAMSTRA interface for editing a worker's training record. The worker is Michael Farley (ID 908). The 'Training' tab is active, showing a list of training records. The 'Actions' dropdown menu for the first record is open, highlighting the 'Delete' option.

ID	Course Name	Course Code	Start Date	End Date	Expiry Date	Licence	Passed Course	Score	File	Actions
9871	Project Management	PROJMG	27/06/2018	27/06/2018	27/06/2019				No file	Actions
9870	Fork Lift Truck Certification	FLT 1	18/07/2018	18/07/2018	18/07/2021				No file	Actions
9863	Safe Operating Procedur...	SOP101	07/04/2018	07/04/2018	07/04/2018		Yes	88	No file	Actions
9849	Advanced Word Refresher	ADVWROR	11/06/2018	12/06/2018	12/06/2019				No file	Actions
9830	Project Management	PROJMG	19/07/2017	19/07/2017	19/07/2018		Yes	92	No file	Actions
9803	Fair Work Act	FWA	25/06/2018	25/06/2018	25/06/2020				No file	Actions
9802	Fair Work Act	FWA	19/01/2018	19/01/2018	19/01/2018		Yes	100	No file	Actions
9799	Conflict Management	CONMGMT	16/07/2018	20/07/2018	20/07/2020				No file	Actions
9798	First Aid	FRSTAD	22/01/2018	22/01/2018	22/01/2020		Yes	88	No file	Actions
9797	Advanced Excel	MS_XLS	01/05/2018	02/05/2018	02/05/2019				No file	Actions

Showing 10 entries | Showing 1 to 10 of 13 entries

Training Status

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	Red	No Training Required
Shovel Management (SOP101)	19/07/2018	Green	No Training Required

Manage Training

Historical or Unscheduled Courses

To add a record of a Training Course that the Worker has already attended, or assign them to undertake unscheduled Training (for example, a self-paced course), **click** 'Add', and leave the 'Type' field set to 'Manually Add Training'.

The screenshot displays the DAMSTRA 'Worker / Edit Worker - 908 - Michael Farley' interface. The 'Training' tab is active, showing a table of training records. A modal window is open for adding a new training record, with the 'Type' field set to 'Manually Add Training'.

Training Record Table:

ID	Course Name	Course Code	Start Date	End Date	Expiry Date	Licence	Passed Course	Score	File	Actions
9871	Project Management	PROJMG	27/06/2018	27/06/2018	27/06/2019				No file	Actions
9883	Safe Operating Procedur...	SOP101	07/04/2016	07/04/2016	07/04/2019		Yes	89	No file	Actions
9849	Advanced Word Refresher	ADVWRDR	11/06/2018	12/06/2018	12/06/2019				No file	Actions
9830	Project Management	PROJMG								Actions
9803	Fair Work Act	FIRW								Actions
9802	Fair Work Act	FIRW								Actions
9799	Conflict Management	CON								Actions
9796	First Aid	FRS								Actions
9797	Advanced Excel	MS								Actions
9796	Advanced Word	ADV								Actions

Training Record Modal:

- Type: Manually Add Training
- Course Name *: Type Something...
- Course Date *: 13/06/2018
- Passed Course: -- Please Select --
- Course Mark:
- Licence:
- Attach File:
- Buttons: Add File, Do not alert or escalate
- Save Training

Manage Training

Historical or Unscheduled Courses cont.

Work your way through the form, completing mandatory and relevant fields as you go.

Type the name of the Training Course in the *Course Name* field. Smart Search functionality will help you find the right Course as you begin to type.

Select the date that the Course was (or will be) undertaken either by **typing** the date directly into the field or **clicking** the calendar icon and **selecting** the date.

The screenshot shows the 'Edit Worker - 908 - Michael Farley' page in the DAMSTRA system. The 'Training' tab is active. The form includes fields for 'Unique Student Identifier', 'Training Record', 'Type' (set to 'Manually Add Training'), 'Course Name' (set to 'Vault Training - (VT908)'), 'Course Date' (set to '19/01/2018' with a calendar icon), 'Passed Course' (set to '-- Please Select --'), 'Course Mark', 'Licence', and 'Attach File' (with an 'Add File' button). There is a checkbox for 'Do not alert or escalate' and buttons for 'Save Training' and 'Cancel'. Below the form is a 'Training Status' table with columns for Course Name, Expiry Date, Status, and Actions.

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	Red square icon	No Training Required
Project Management (PROJMG1)	10/07/2018	Green square icon	No Training Required
Office Safety (OS01)	--	Red square icon	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Red square icon	No Training Required
First Aid (FRSTAD)	23/01/2020	Green square icon	No Training Required
Fair Work Act (FWA)	19/01/2018	Yellow square icon	No Training Required

Manage Training

Historical or Unscheduled Courses cont.

If a historical record is being entered, *Passed Course* should be **set** to *Yes* or *No* and a *Course Mark* entered, otherwise it may be left at *Please Select* until the Course has been taken and the outcome is known.

Again, If the Worker earned a Licence from successfully completing the Course, **enter** the Licence details.

Once all mandatory and relevant information has been entered, **click** 'Save Training'.

Worker / Edit Worker - 908 - Michael Farley

Worker Details | Governance | Inductions | Licences | **Training** | PPE | Medical | Reviews / Notes | Contact Details | Related

Unique Student Identifier:

Training Record

Type:

Course Name *:

Course Date *:

Passed Course:

Course Mark:

Licence:

Attach File:

☐ Do not alert or escalate

Training Status

Course Name	Expiry Date	Status	Actions
Safe Operating Procedures 101 (SOP101)	07/04/2018	F	No Training Required
Project Management (PROJMG1)	10/07/2018	G	No Training Required
Office Safety (OS01)	--	F	No Training Required
Fork Lift Truck Certification (FLT 1)	--	F	No Training Required
First Aid (FRSTAD)	22/01/2020	G	No Training Required
Fair Work Act (FWA)	19/01/2018	E	No Training Required

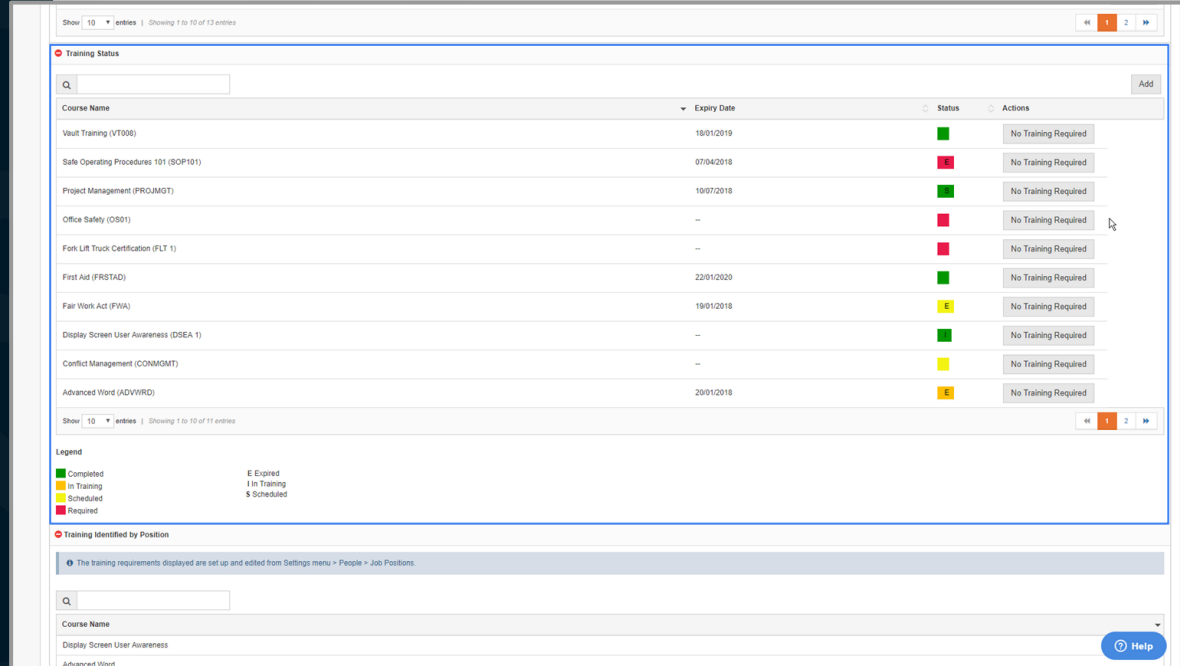
Manage Training

Training Status Section

The *Training Status* section displays the status or outcome of any Training Course that has been identified as required for the Worker, or that the Worker has already undertaken.

It is automatically populated by positional training requirements and Training Courses that are added to the *Training Record* section, and kept current by the outcome (i.e. pass/fail) being recorded.

Training Requirement statuses are indicated with colours and, in some cases, letters.



Training Status

Show 10 entries | Showing 1 to 10 of 13 entries

Course Name	Expiry Date	Status	Actions
Vault Training (VT008)	18/01/2019	Completed	No Training Required
Safe Operating Procedures 101 (SOP101)	07/04/2018	Required	No Training Required
Project Management (PROJMG1)	10/07/2018	Completed	No Training Required
Office Safety (OS01)	--	Required	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Required	No Training Required
First Aid (FRSTAD)	22/01/2020	Completed	No Training Required
Fair Work Act (FWA)	19/01/2018	In Training	No Training Required
Display Screen User Awareness (DSEA 1)	--	Completed	No Training Required
Conflict Management (CONMMGT)	--	Scheduled	No Training Required
Advanced Word (ADVWRD)	20/01/2018	In Training	No Training Required

Show 10 entries | Showing 1 to 10 of 11 entries

Legend

- Completed
- In Training
- Scheduled
- Required
- E Expired
- I In Training
- S Scheduled

Training Identified by Position

The training requirements displayed are set up and edited from Settings menu > People > Job Positions.

Course Name

Display Screen User Awareness

Advanced Word

Help

Manage Training

Status Colours

Colours represent the primary status and may be one of the following:

 : This person has passed this Training Course and certification is current

 : This person is scheduled for this Training Course

 : This person is currently undertaking this Training Course

 : This Training Course is required for this Person but is currently not scheduled or being undertaken, or this Person has undertaken this training but a pass mark was not achieved

Add			
▼ Expiry Date	◇ Status	◇ Actions	
18/01/2019		No Training Required	
07/04/2018		No Training Required	
10/07/2018		No Training Required	
--		No Training Required	
--		No Training Required	
22/01/2020		No Training Required	
19/01/2018		No Training Required	
--		No Training Required	
--		No Training Required	
20/01/2018		No Training Required	
◀ 1 2 ▶			

Manage Training Status Letter: E

Letters represent secondary information that add context to a current training status, where required.

For example: the letter *E* means *Expired* and, coupled with a colour, gives a more detailed picture than the colour alone.

The letter *E* is only used in conjunction with *yellow, orange or red squares* and their presence indicates that certifications are being allowed to lapse.

The screenshot displays the 'Manage Training' interface. At the top, there's a search bar and a table of training courses. The table has columns for Course Name, Expiry Date, Status, and Actions. A large grey box with the text 'E = EXPIRED' is overlaid on the table. Below the table, there's a legend section titled 'Legend' with color-coded squares and their corresponding status letters: Completed (green), In Training (yellow), Scheduled (orange), Required (red), E Expired (green), I In Training (yellow), and S Scheduled (orange). At the bottom, there's a section titled 'Training Identified by Position' with a search bar and a list of training requirements.

Course Name	Expiry Date	Status	Actions
Vault Training (VT008)	18/01/2019	Completed	No Training Required
Safe Operating Procedures 101 (SOP101)	07/04/2018	Required	No Training Required
Project Management (PROJMG1)	10/07/2018	Completed	No Training Required
Office Safety (OS01)	-	Required	No Training Required
Fork Lift Truck Certification (FLT 1)	-	Required	No Training Required
First Aid (FRSTAD)	-	Completed	No Training Required
Fair Work Act (FWA)	-	In Training	No Training Required
Display Screen User Awareness (DSEA 1)	-	Completed	No Training Required
Conflict Management (COMMOMT)	-	Scheduled	No Training Required
Advanced Word (ADVWRD)	-	In Training	No Training Required

Legend

- Completed
- In Training
- Scheduled
- Required
- E Expired
- I In Training
- S Scheduled

Training Identified by Position

The training requirements displayed are set up and edited from Settings menu > People > Job Positions.

Manage Training

Expired Status + Colours

 : This Person's existing certification has expired

 : The Person is scheduled to take this Training Course, but their existing certification has expired

			Add
▼ Expiry Date	◇ Status	◇ Actions	
18/01/2019		No Training Required	
07/04/2018		No Training Required	
10/07/2018		No Training Required	
--		No Training Required	

--		No Training Required	
--		No Training Required	
22/01/2020		No Training Required	
19/01/2018		No Training Required	
--		No Training Required	
--		No Training Required	

Manage Training

Other Status + Colour Combinations

I = In Training
S = Scheduled

These letters are only used in conjunction with a green 'Current' primary status and indicate proactive management of certification is being maintained

 **I** : Holds current certification, but currently undertaking course again

 **S** : Holds current certification, but scheduled to undertake course again

			Add
▼ Expiry Date	◇ Status	◇ Actions	
18/01/2019		No Training Required	
07/04/2018		No Training Required	
10/07/2018		No Training Required	
--		No Training Required	
--		No Training Required	
--		No Training Required	
22/01/2020		No Training Required	
19/01/2018		No Training Required	
--		No Training Required	
--		No Training Required	

Manage Training

All Statuses and Triggers

Status	Symbol	Description	Status Triggered by...
None		<u>Not Required</u>	n/a
Required		Training <u>Required</u>	Training marked as required or outcome of previous Training recorded as 'not passed'
Required	E	Previous Training Certification has <u>expired</u>	Current certification expiry date exceeded
Scheduled		Training is <u>Scheduled</u>	Added as Attendee to scheduled Training Course
Scheduled	E	Previous Training <u>expired</u> and person is <u>scheduled</u>	Current certification expiry date exceeded and Added as Attendee to refresher Training Course
In Training		<u>In Training</u>	Scheduled Training date = today's date or later and outcome has not been updated
In Training	E	Previous Training <u>expired</u> and person is <u>in training</u>	Current certification expiry date exceeded and Scheduled Refresher Training date = today's date or later and outcome has not been updated
Current		Certification is <u>Current</u>	Outcome of Training recorded as 'passed' and certification expiry not yet exceeded
Current	S	Previous certification is <u>current</u> and person is <u>scheduled</u>	Added as Attendee to scheduled refresher Training and current certification expiry not yet exceeded
Current	I	Previous certification is <u>current</u> and person is <u>in training</u>	Added as Attendee to scheduled refresher Training and current certification expiry not yet exceeded and scheduled Training date = today's date or later and outcome has not been updated



Manage Training

Adding Additional 'Required' Training Courses

Additional Courses may be added as *Required* to the Worker's record by **clicking 'Add'** and **typing** the Course name

Note that this action will reflect the fact that the Worker is required to undertake the Course, but it will not schedule them to attend a Course.

The screenshot displays the 'Manage Training' interface. At the top, there's a search bar and a table of training courses. The table has columns for Course Name, Expiry Date, Status, and Actions. The 'Status' column uses color-coded icons: green for 'Completed', yellow for 'In Training', orange for 'Required', and red for 'Scheduled'. The 'Actions' column contains a 'No Training Required' button for each course. Below the table is a legend explaining the status icons. At the bottom, there's a section titled 'Training Identified by Position' with a note about training requirements being set up from the Settings menu. A search bar is also present in this section. A small inset window shows a search for 'How To Write A Sales Proposal (WSP)' with a 'Save Training Status' button.

Course Name	Expiry Date	Status	Actions
Vault Training (VT008)	18/01/2019	Completed	No Training Required
Safe Operating Procedures 101 (SOP101)	07/04/2018	Required	No Training Required
Project Management (PROJMG1)	10/07/2018	Completed	No Training Required
Office Safety (OS01)	--	Required	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Required	No Training Required
First Aid (FRSTAD)	22/01/2020	Completed	No Training Required
Fair Work Act (FWA)	19/01/2018	In Training	No Training Required
Display Screen User Awareness (DSEA 1)	--	Completed	No Training Required
Conflict Management (COMMOMT)	--	In Training	No Training Required
Advanced Word (ADVWRD)	20/01/2018	Required	No Training Required

Legend

- Completed
- In Training
- Scheduled
- Required
- E Exired
- I In Training
- S Scheduled

Training Identified by Position

The training requirements displayed are set up and edited from Settings menu > People > Job Positions.

Search bar: [Search]

Course Name: [Search]

Display Screen User Awareness

Advanced Word

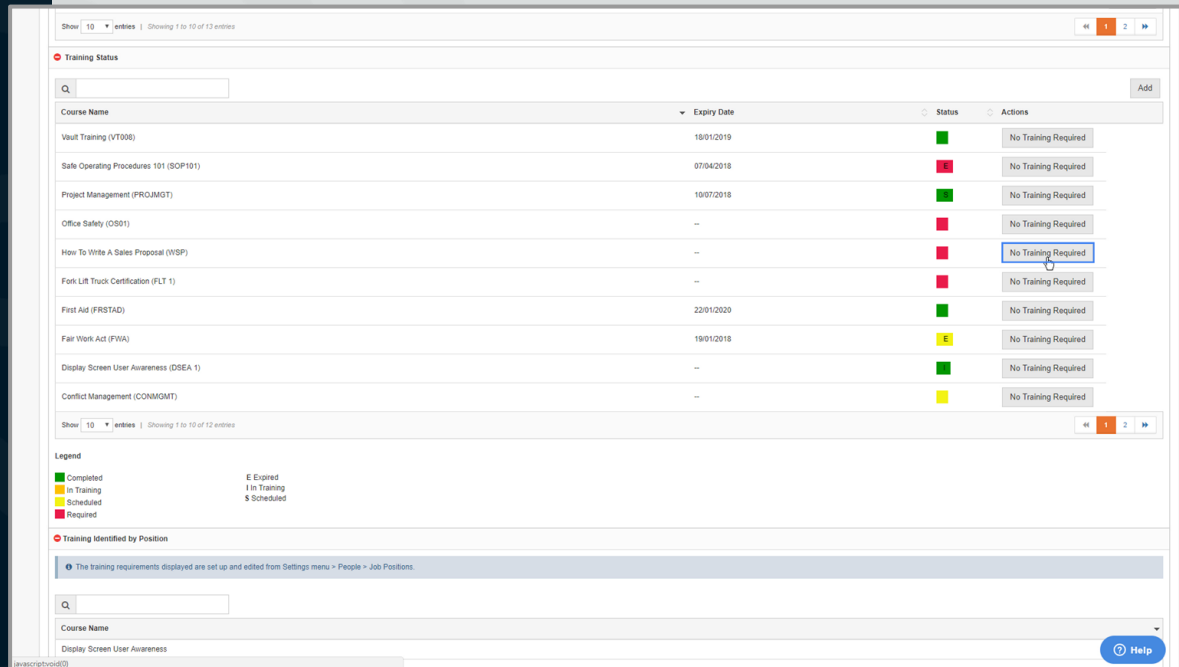
How To Write A Sales Proposal (WSP)

Save Training Status

Manage Training

Removing 'Required' Training Courses

To remove a Training Course currently marked as *Required* for this Worker, simply **click** 'No Training Required'.



Training Status

Course Name	Expiry Date	Status	Actions
Vault Training (VT008)	18/01/2019	Completed	No Training Required
Safe Operating Procedures 101 (SOP101)	07/04/2018	Required	No Training Required
Project Management (PROJMGMT)	10/07/2018	Completed	No Training Required
Office Safety (OS01)	--	Required	No Training Required
How To Write A Sales Proposal (WSP)	--	Required	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Required	No Training Required
First Aid (FRSTAD)	22/01/2020	Completed	No Training Required
Fair Work Act (FWA)	19/01/2018	Expired	No Training Required
Display Screen User Awareness (DSEA 1)	--	Completed	No Training Required
Conflict Management (CONMGMT)	--	In Training	No Training Required

Legend

- Completed
- In Training
- Scheduled
- Required
- E Expired
- I In Training
- S Scheduled

Training Identified by Position

The training requirements displayed are set up and edited from Settings menu > People > Job Positions.

Course Name

Display Screen User Awareness

Help

Manage Training

Training Identified by Position Section

The *Training Identified by Position* section shows Courses that are associated with the Worker's Position.

It requires no input but is presented here for informational purposes. The association between Positions and Training Courses is maintained via *Settings*.

Once all edits have been made, **click 'Save Worker'** to return to the Worker Register.

The screenshot displays the 'Manage Training' interface. At the top, a table lists training courses with columns for course name, date, status, and a 'No Training Required' button. Below the table is a legend for the status icons: Completed (green), In Training (yellow), Scheduled (orange), and Required (red). The 'Training Identified by Position' section is highlighted with a blue border. It contains a search bar, a list of course names (Display Screen User Awareness, Advanced Word, Advanced Excel), and a 'Show' dropdown. At the bottom, there are 'Save Worker' and 'Cancel' buttons, and a 'Help' button in the bottom right corner.

Course Name	Date	Status	Action
Safe Operating Procedures 101 (SOP101)	07/04/2018	Required	No Training Required
Project Management (PROJMGMT)	10/07/2018	Completed	No Training Required
Office Safety (OS01)	--	Required	No Training Required
Fork Lift Truck Certification (FLT 1)	--	Required	No Training Required
First Aid (FRSTAD)	22/01/2020	Completed	No Training Required
Fair Work Act (FWA)	19/01/2018	In Training	No Training Required
Display Screen User Awareness (DSEA 1)	--	Completed	No Training Required
Conflict Management (CONMGMT)	--	Scheduled	No Training Required
Advanced Word (ADVWORD)	20/01/2018	In Training	No Training Required

Legend

- Completed
- In Training
- Scheduled
- Required
- E Expired
- I In Training
- S Scheduled

Training Identified by Position

The training requirements displayed are set up and edited from Settings menu > People > Job Positions.

Search: []

Course Name: []

Display Screen User Awareness

Advanced Word

Advanced Excel

Show: 10 entries | Showing 1 to 3 of 3 entries

Save Worker Cancel

Help

