

EQMS Quick Start Guide



Training Manager - Searching for Records



What do you need help with?

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Searching for Records

This page enables you to search the training record database for the relevant individual or department you are looking for. You can enter details in as many of the fields as you need to narrow/widen your search.



Search criteria
This button increases or reduces the amount of search criteria fields

Do you know roughly when the training took place?
You can use these fields to search for records within a specific time period

Finding the right records
You can search by department name and if you are looking for which course they have had training for, click the relevant course under the 'Course' field

Additional Items
You can search for an individual's courses by clicking in the 'Trainee' field

Using the Skills Matrix

The Training Matrix report can give you an overview of whether an individual has received training, whether training is required, if it has expired etc. The 'All' option will show all users in the system, subject to relevant permissions, and all courses but you can group the data to drill down to the information you need. As shown below, you can group by department, ie company name.



Filter the data

As well as grouping the users by department, you can filter by the department here. This will just show the results for the department you are looking for

The screenshot shows the EQMS Training Manager interface. The main area is titled 'Training Matrix'. It features several filter options: 'Filter Users By' (All, Department, Role), 'Filter Training By' (All, Category, Role), 'Include Inactive Users' (checkbox), and 'Include Inactive Courses' (checkbox). There are also dropdown menus for 'Group Users By' (set to Department) and 'Group Training By' (set to No Grouping). A search icon is visible in the top right of the filter area.

Below the filters, there is a legend for training status: ~ No Training, Training Required and No Record, Expired, Unconfirmed and confirm by date passed, Unconfirmed, About to expire (within 4 weeks), and Valid Training. There are also buttons for 'Export to Excel (97-2003)' and 'Export to Excel'.

The data table below has columns for 'Status', 'Department', 'User Name', and various 'Training Course' categories. The 'Department' column is filtered to show 'Aberdein Considine' and 'Accolade Wines'. The 'User Name' column lists users like Robertson, Greig, Dawe, Liam, Garcia, Isabel, Kent, Michael, and White, Adie. The 'Training Course' columns include 27001 Bespoke Information Security Training Course, Advanced Engineering Exhibition & Conference, BPMN & Swimlanes, Document Manager, Documentation, EQMS Audit Administrator, EQMS Audit Manager, EQMS Change Manager, EQMS Document Manager, EQMS Equipment Manager, EQMS Issues Administrator, EQMS Issues Manager, EQMS Risk Administrator, EQMS Risk Manager, and EQMS Supplier Administrator. The cells in the table are color-coded according to the legend, with green indicating 'Valid Training' and other colors indicating different training statuses.

Filter the data

You can then filter the department further. The user name column will show the users who are created in the system for that department

Using the Skills Matrix (continued)

You can also group the courses by category and then filter to show which users have received that training

Training Matrix

Filter Users By: All Department Role

Filter Training By: All Category Role

Include Inactive Users:

Include Inactive Courses:

Group Users By:

Group Training By:

Cells containing "~" are not required by role.

No Training |
 Training Required and No Record |
 Expired |
 Unconfirmed and confirm by date passed |
 Unconfirmed |
 About to expire (within 4 weeks) |
 Valid Training

Status
Category ▾
Training Course ▾

User Name ▾	Audit & Quality Control	Business Modelling	Core Quality					External Customer Training										Information Go
	QMS Internal Auditor	BPMN & Swimlanes	Documentation	GDocP (GMP)	Good Email Communications	Information Security	QQMS Training Manager	EQMS Audit Manager	EQMS Change Manager	EQMS Document Manager	EQMS Equipment Manager	EQMS Issues Manager	EQMS Risk Manager	EQMS Supplier Manager	EQMS System Manager	EQMS Training Manager	27001 Bespoke Information Security Training Course	
Abonyi-Kiss, Anita	~	~	~	~	~	~	~	~	~	~		~	~	~	~	~	~	
Account, System	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	~	
Ahmed, Habeeba	~	~	~	~	~	~	~	~	~	~		~	~	~		~	~	
Al Hajri, Abdulhadi	~	~	~	~	~	~	~	~	~	~	~	~		~	~	~	~	

Grouping Training Records
 Select how you want the records grouped

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