EQMS Quick Start Guide

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Training Manager
- Uploading a Document to
a Training Record

Uploading a Document to a Training Record

The following slides will show you how to upload a document to a training record. This will be necessary for example if evidence is required and you need to upload a course certificate.
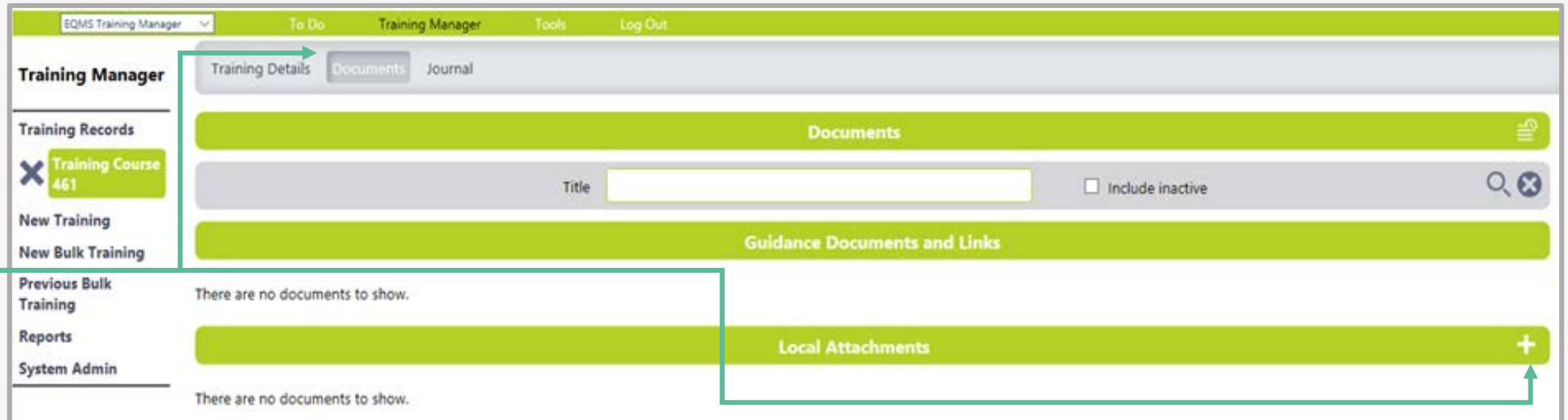
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First step
First, create your training record, by clicking on New Training, New Bulk Training or Previous Bulk Training on the left hand menu. Once you have entered all the information you have, click save and you will be presented with a screen like the image to the left

| EQMS Training Manager | To Do | Training Manager | Tools | Log Out |

Training Manager

Training Details   Documents   Journal

Training Records

❌ **Training Course 461**

New Training

New Bulk Training

Previous Bulk Training

Reports

System Admin

Training Record Details

Record ID	461
Department	All Sirus
Trainee	Wilson, Caroline
Training Category	Health and Safety
Course	Manual Handling

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Next step
Click the **Documents** tab. Here you can add a document that is saved to a local Shared Area or desktop by clicking on the cross

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Documents

Title [   ] ☐ Include inactive

Guidance Documents and Links

There are no documents to show.

Local Attachments

There are no documents to show.

Uploading a Document to a Training Record (continued)

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Training Details | Documents | Journal

Documents

Title [   ]   ☐ Include inactive

Guidance Documents and Links

here are no documents to show.

Local Attachments

here are no documents to sh

Attach Document

Doc ID | New

Title | Test document

File | C:\Users\cwilson\Documents\Completed config plans built\DM - SIRUS\Test document.docx | Browse...

Uploading the document
Click this symbol when you are ready to add the document to the record

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Naming the file
This is mandatory to be completed. Check to ensure that the title does not contain any special characters, including ,.(-)_*

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Finding the document
Click Browse and find the document on your desktop or Shared Area

Uploading a Document to a Training Record (continued)

Training Details   Documents   Journal

Training Record Details

Record ID	461	Date Created	22 Aug 2017
Department	All Sirus	Logged By	Wilson, Caroline
Trainee	Wilson, Caroline	Status	New
Training Category	Health and Safety	Training Date	22 Aug 2017
Course	Manual Handling	Re-training Date	22 Aug 2020
Training Provider	--- Please Select ---	Trainer	--- Please Select ---
Cost	0.00	Rating	--- Please Select ---
Trainee Comments		Detail	
Expand		Expand	

Confirming the record
Once you have added the document (s) you wish to add, and entered all the other details you need to, if the training has taken place click the tick icon to save and confirm the record

Naming the file
If the training has not yet taken place, or you want to be able to return the record later, you can click the Disk/Save icon

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