

EQMS Quick Start Guide



Training Manager



What do you need help with?

- [Training Records List](#) →
- [Training Record Details](#) →

Training Records List

Here you will find a list of Training Records. As a standard EQMS user, you have permission to view your own Training Records. If you are a Training Manager or Administrator, you will be able to view the records of others.



Module Access
This dropdown list allows you to navigate easily between EQMS Modules

To Do
Access your EQMS To Do List

Tools
Access your User Details screen

Log Out
Sign out and exit EQMS

Qualsys | Training Records Manager

Training Manager ▼ To Do Training Manager Tools Log Out

Training Manager

Training Records

New Training

Training Records List

From To

Record ID

Training Category

Keywords

Training provider

Course

Status

Trainer

Department

Add Search Criteria

You have not selected any metadata filters

List Filters
As a standard user, your own Training records will be displayed in the list. Several fields are available to help you filter the results.

Date, Status, ID, Provider, Trainer, Category, Course, Department and Keyword filters are available to be used alone or in conjunction with one another.

Additionally, Admins and Managers can filter by **Trainee**

Training Records List
Below the search fields, a list of matching Training Records will be displayed. As a standard user, you will only be able to see your own records. As a Manager or Administrator, you will be able to see all permitted records

Additional Search Criteria
Add additional fields to the search criteria by selecting them from the dropdown list. Each available field relates to Metadata created by the Module Administrator(s)

Minimize Fields

Report Results

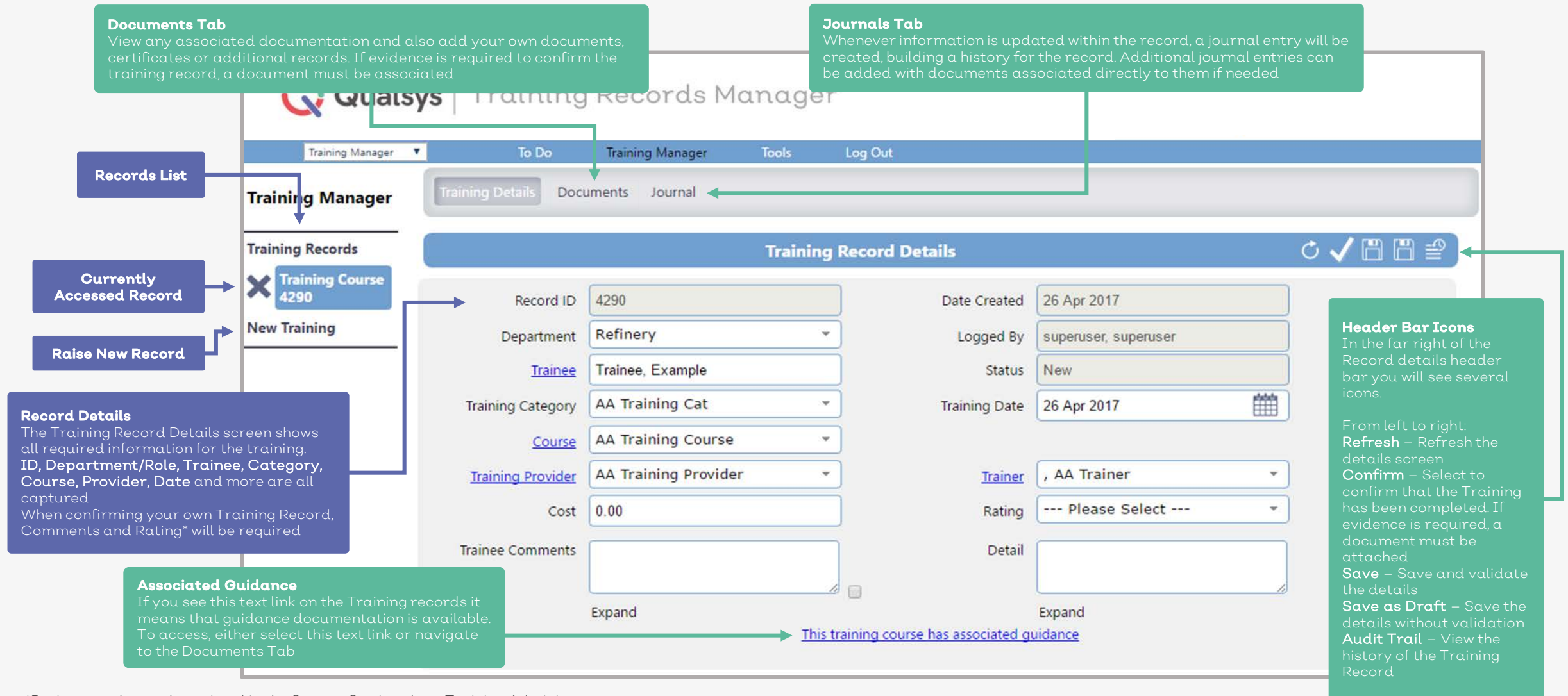
Clear Fields

Submit Search

Record ID	Trainee	Course	Training Date	Status
4290	Example Trainee	AA Training Course	26 Apr 2017	New

Training Record Details

Each Training Record within EQMS has its own details screen. From here you can update permitted information and attach additional data where required.



Documents Tab
View any associated documentation and also add your own documents, certificates or additional records. If evidence is required to confirm the training record, a document must be associated.

Journals Tab
Whenever information is updated within the record, a journal entry will be created, building a history for the record. Additional journal entries can be added with documents associated directly to them if needed.

Records List
Training Manager

Currently Accessed Record
Training Course 4290

Raise New Record
New Training

Record Details
The Training Record Details screen shows all required information for the training. ID, Department/Role, Trainee, Category, Course, Provider, Date and more are all captured. When confirming your own Training Record, Comments and Rating* will be required.

Associated Guidance
If you see this text link on the Training records it means that guidance documentation is available. To access, either select this text link or navigate to the Documents Tab.

Header Bar Icons
In the far right of the Record details header bar you will see several icons.
From left to right:
Refresh – Refresh the details screen
Confirm – Select to confirm that the Training has been completed. If evidence is required, a document must be attached
Save – Save and validate the details
Save as Draft – Save the details without validation
Audit Trail – View the history of the Training Record

Training Record Details

Record ID: 4290
Department: Refinery
Trainee: Trainee, Example
Training Category: AA Training Cat
Course: AA Training Course
Training Provider: AA Training Provider
Cost: 0.00
Trainee Comments: [Text Area]
Expand

Date Created: 26 Apr 2017
Logged By: superuser, superuser
Status: New
Training Date: 26 Apr 2017
Trainer: , AA Trainer
Rating: --- Please Select ---
Detail: [Text Area]
Expand

[This training course has associated guidance](#)

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