

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

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

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	Date Created	26 Apr 2017
Department	Refinery	Logged By	superuser, superuser
Trainee	Trainee, Example	Status	New
Training Category	AA Training Cat	Training Date	26 Apr 2017
Course	AA Training Course	Trainer	, AA Trainer
Training Provider	AA Training Provider	Rating	--- Please Select ---
Cost	0.00	Detail	
Trainee Comments			

[This training course has associated guidance](#)

*Ratings can be made optional in the System Settings by a Training Administrator

Aizlewood's Mill,
Nursery Street,
Sheffield
S3 8GG

 +44 114 282 3338

 info@qualsys.co.uk

