



Guidance for using Training Register

What is the Training Register – The Training Register is a database which enables you to keep accurate records of scheduled and completed training for all of your staff. You will be able to enter third party training such as forklift, first aid and RSA's and will have reminders for refresher training. You will also be able to record scanned copies of training certificates as proof of competent training.

When should you use it – Existing staff should be entered into the Training Register along with their up to date training records and you should enter new staff members as they are employed. As a staff member completes any training the results will be entered along with the recommended date for refresher training.

Why should you use it – Legislation requires you to not only train your staff, but to be able to provide records of that training. It is easy to lose track of when refresher training such as Responsible Service of Alcohol is due, but the Training Register will keep those records in one place and you will be able to see at a glance when training is due.

You will notice that there is a column for online training and a column for **SWI** training for each system. When all of the required **Safe Work Instructions (SWI)** have been completed for a system you can enter those details into the Training Register if you wish. It is also perfectly acceptable to just keep hard copies of sign off registers.

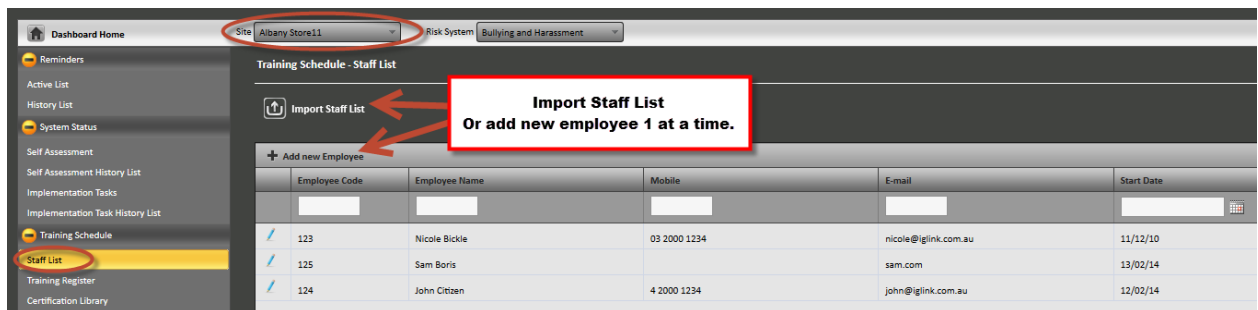
Who should do it – The person responsible for training in your organisation should have a good understanding of training requirements, especially in the areas of WHS, Food Safety and Liquor. MGA can provide advice if you require it.

Accessing your Training Register – You will access the Training Register from your Home Dashboard

Accessing your staff records – Once entered, all of your training records and scanned certificates will be easily accessed.

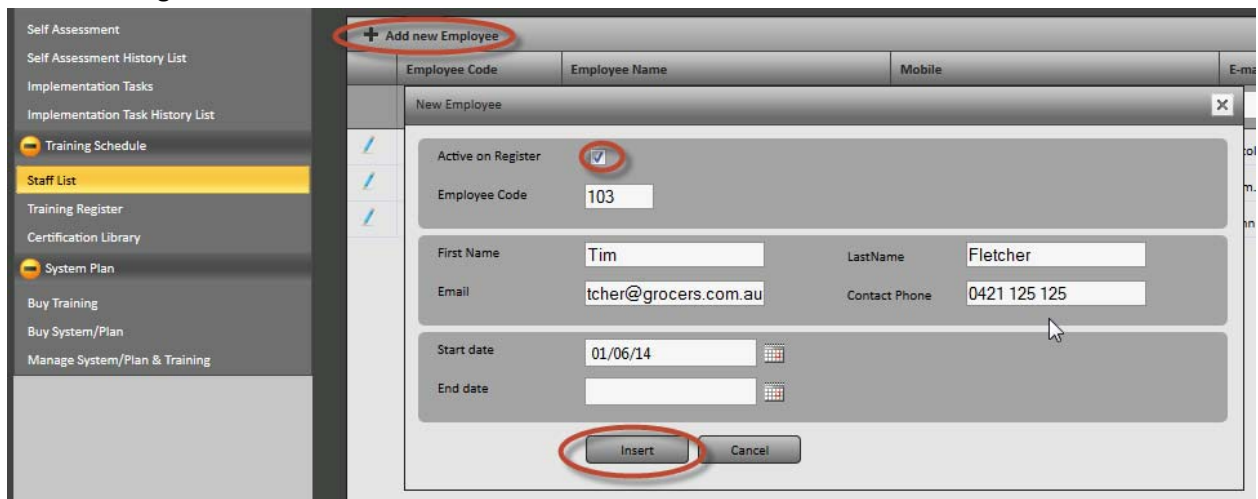
Training Register

1. Select 'Staff List' under training schedule from the left hand navigation. Select your store in the drop down menu if you have multiple stores



Employee Code	Employee Name	Mobile	E-mail	Start Date
123	Nicole Bickle	03 2000 1234	nicole@glink.com.au	11/12/10
125	Sam Boris		sam.com	13/02/14
124	John Citizen	4 2000 1234	john@glink.com.au	12/02/14

2. Add your employees by selecting '+ Add new Employees'. A pop up box will appear. Make sure the 'Active on register' box is ticked



3. Enter the employee number or code and name. If you don't have employee codes leave that field blank.

Enter their email address and phone number if you require those fields to be filled.

Select the staff member's start date via the calendar icon.

Confirm employee details by selecting 'Insert'.

4. You will now see that your new employee has been added to your staff list. Continue to add all of your employees in the same way. To edit an employee's details, go back to 'Staff list' on the side menu, search for employee by name or code and click on the pencil icon.



Import Staff List

+ Add new Employee

Employee Code	Employee Name	Mobile	E-mail	Start Date
123	Nicole Bickle	03 2000 1234	nicole@iglink.com.au	11/12/10
125	Sam Boris		sam.com	13/02/14
124	John Citizen	4 2000 1234	john@iglink.com.au	12/02/14
103	Tim Fletcher	0421 125 125	time.fletcher@grocers.com.au	01/06/14

If a staff member's employment has ceased, un-tick the 'Active on Register' tick-box and enter their end date. They will no longer appear on the 'Training Register', but they will however remain in the 'Staff list' and 'Certification Library' along with their end date.

If you wish to upload a larger group of staff members at once, select the 'Import Staff List' Icon. Click 'Download Staff Template'.

Simply paste in the data, ensuring 'date' format and select 'yes/no' from the drop down to include or exclude staff members in the 'Training Register'. *Ensure that you do not have duplicates and save as .xls

A	B	C	D	E	F	G
Employee Code	First Name	Last Name	Contact Phone	E-mail	Start date	Active on Register
123	kira	smith	0499467288	smstore.ks2	15/02/13	yes
124	kym	dean	0400756474	blue0@bigp	16/02/12	yes
125	lynette	renner	0437672696	test5@hotm	02/04/11	yes

Training Schedule - Staff List

Import Staff List

+ Add new Employee

Employee Code
123
125
124
103

Download Staff Template.xls

Select Excel File : Upload

Sheet Name: 'Store Name\$' Import

Staff List Upload Guide

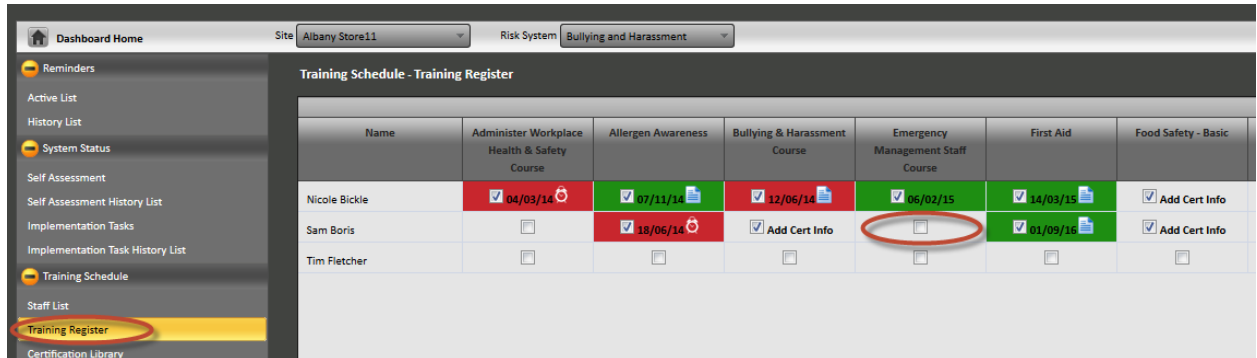
- 1- Download staff template
- 2- Insert staff detail in spreadsheet

NOTE: Select "Yes" under 'Active on Register' to include staff member in Training Register.

- 3- Upload completed staff template.xls
- 4- Select sheet
- 5- Import

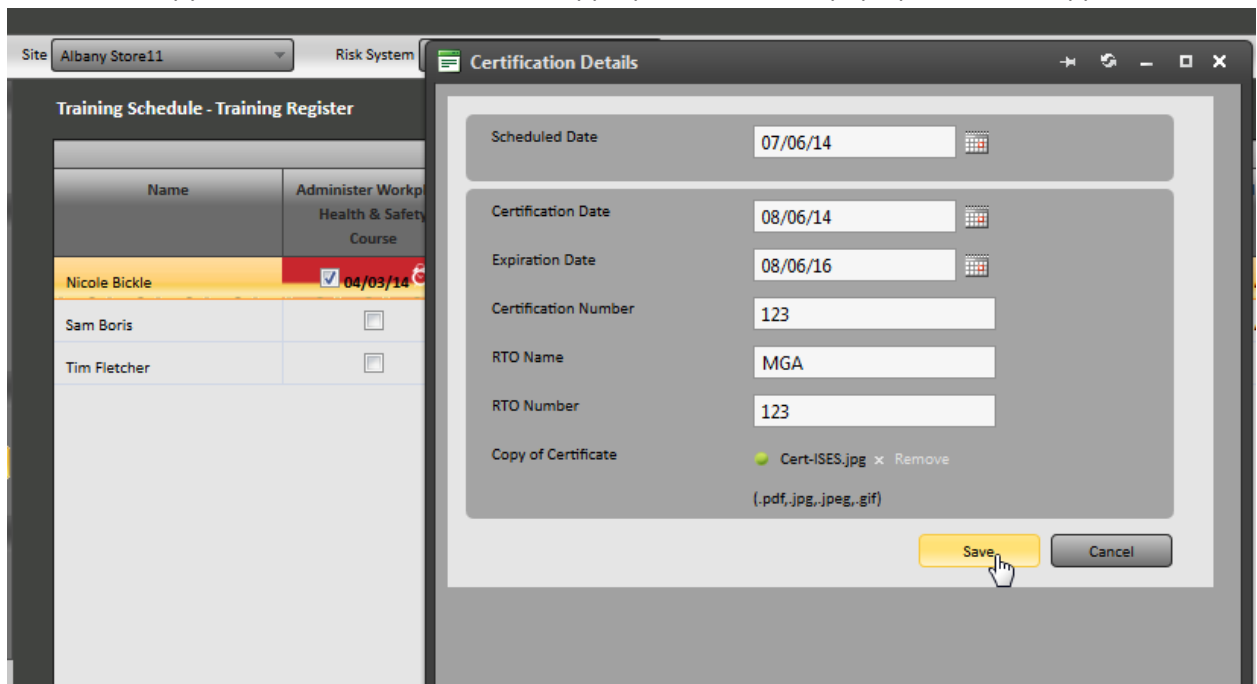


5. To add required training for each employee select 'Training Register' on the left hand navigation. Tick the relevant empty boxes to add any required training modules for each staff member. Once the box is ticked, click on the 'Add Cert Info' and add the date the training is scheduled, then 'Save'. This will add a clock icon to that cell and the scheduled training date will appear. The cell will be red as the training has not yet been completed.



Once the training has been completed, click on that cell and the pop up box will appear. Complete the 'Certification Date' and the date that their training will need to be repeated or refreshed, the 'Expiration Date'. This will trigger a reminder when the training is due by the fact the cell will turn amber 30 days from when the training is required then red when the training is expired. You are also able to list the RTO details and the certificate number.

6. To add a copy of the certificate, click on the appropriate cell and a pop up screen will appear.



Click 'Add Certificate' at the bottom of the pop up screen. This will allow you to:

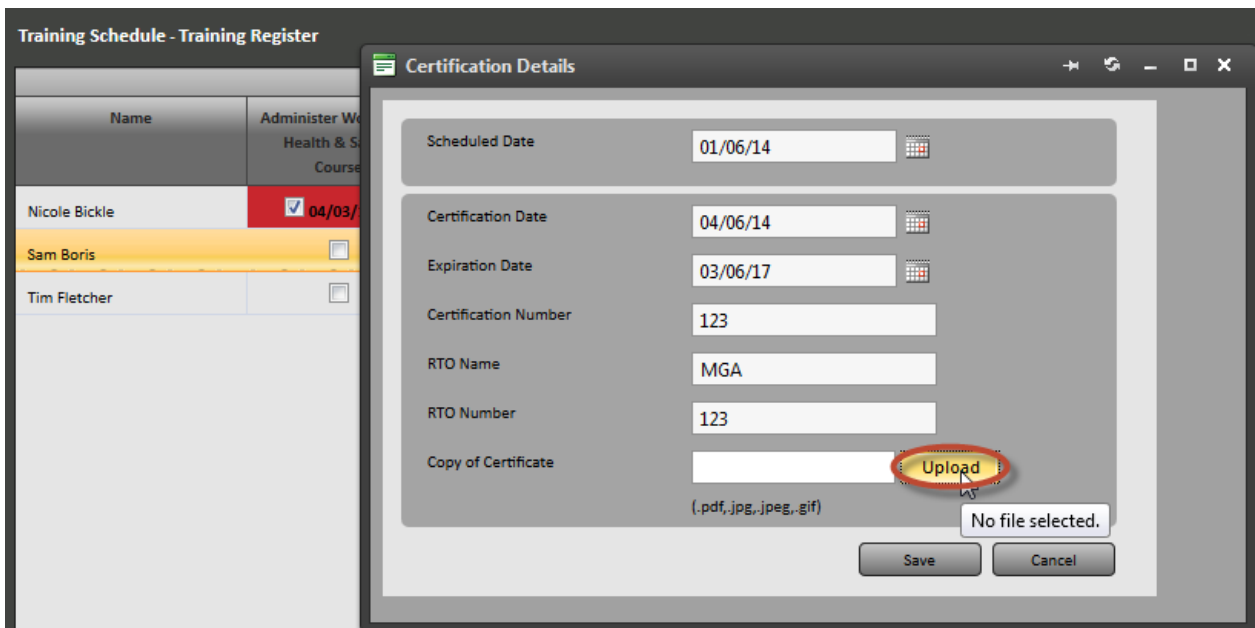
- Add a certificate to their record or



- o Schedule or reschedule training for them

When adding a certificate you will first need to scan and save any certificates if they are not already saved in your system. Then select 'upload' to navigate your system and select the certificate to add to the employee's training record.

(Ensure it is a supported file type ie: .pdf, .jpg, .gif). You will see it has successfully uploaded when the indicator dot is green. Then 'Save'.



7. Check all employees' current training records and enter the details using step 5.

8. Once you have added all of the training that the staff have already achieved you have the opportunity to identify any gaps. Click 'Add Cert Info' and the dialogue box will pop up and allow you to schedule the training relevant to the employee's position. (Enter the scheduled date)

9. Once you have scheduled training for all of your staff you will note that the upcoming training appears red and has an alarm clock and a date to indicate when it has been scheduled.

The green ones show training that has been completed. If they have a certificate icon that means you have up-loaded the certificate.

Training Schedule - Training Register					
Name	Administer Workplace Health & Safety Course	Allergen Awareness	Bullying & Harassment Course	Emergency Management Staff Course	First Aid
Nicole Bickle	✓ 04/03/14 🕒	✓ 07/11/14 📄	✓ 29/03/15	✓ 06/02/15	✓ 14/03/15 📄
Sam Boris	☐	✓ 18/06/14 🕒	✓ 27/06/14 🕒	✓ 18/06/14	✓ 01/09/16 📄
Tim Fletcher	✓ 07/06/14 🕒	☐	✓ 10/10/14 📄	✓ 17/06/14 🕒	☐



10. You can then manage your historical archive of training by selecting 'Certification Library' from the side navigation.

You can search for certificates by employee, course or dates such as expiry dates. You can download a stored certificate when needed at a later date for auditing purposes. You can view certificates by clicking on the 'Certificate icon' in the right hand column.

The 'cross' and the 'pencil icons' allow you to delete a record or amend a record. We do not recommend deleting records as you will not be able to reinstate them.

Name	Administer Workplace Health & Safety Course	Allergen Awareness	Bullying & Harassment Course	Emergency Management Staff Course	First Aid	Food Safety - Basic
Nicole Bickle	04/03/14	07/11/14	29/03/15	06/02/15	14/03/15	26/06/14
Sam Boris	NA	18/06/14	27/06/14	18/06/14	01/09/16	26/06/14
Tim Fletcher	07/06/14	NA	10/10/14	17/06/14	NA	NA

You can export your training register records to Excel by clicking on the 'Excel' icon

Name	Administer Workplace Health & Safety Course	Allergen Awareness	Bullying & Harassment Course	Emergency Management Staff Course	First Aid	Food Safety - Basic
Nicole Bickle	04/03/14	07/11/14	29/03/15	06/02/15	14/03/15	26/06/14
Sam Boris	NA	18/06/14	27/06/14	18/06/14	01/09/16	26/06/14
Tim Fletcher	07/06/14	NA	10/10/14	17/06/14	NA	NA

	A	B	C	D	E	F	G
1	Name	Administer Workplace Health & Safety Course	Allergen Awareness	Bullying & Harassment Course	Emergency Management Staff Course	First Aid	Food Safety - Basic
2	Nicole Bickle	4/03/2014	7/11/2014	29/03/2015	6/02/2015	14/03/2015	26/06/2014
3	Sam Boris	NA	18/06/2014	27/06/2014	18/06/2014	1/09/2016	26/06/2014
4	Tim Fletcher	7/06/2014	NA	10/10/2014	17/06/2014	NA	NA