> **Training** Tracker®

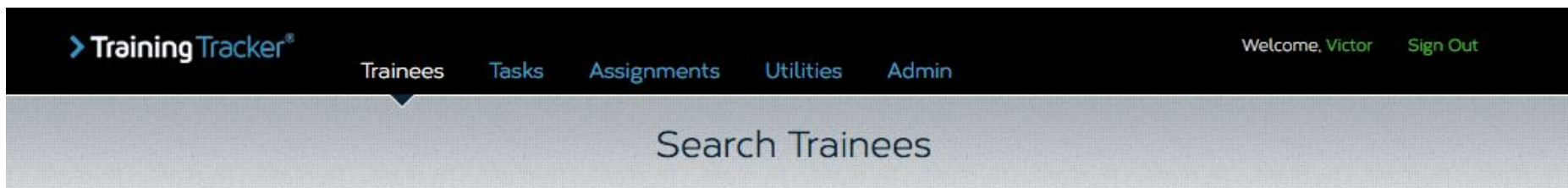# How To Archive Training

computer directions

Deleting vs. Archiving

Deleting a trainee or task will cause all of the associated assignments to be deleted. This might be ok if the information is no longer useful, but in practice, you generally want to keep the information, and remove it from the active reports and queries.

In the case of a trainee, rather than deleting the trainee you can **archive** the trainee so that his or her assignments remain in the system, but no longer appear in queries or reports. We'll show you how to archive and un-archive the trainee, and how to view the archived records.

In the case of a task, rather than deleting, which would remove all associated assignments, the task can be marked as **inactive**. This will keep the completed assignments as part of the trainees' records, but it will remove the ability for a user to assign that task. This is useful when a task is revised (such as an standard operating procedure (SOP) or when a task is no longer required.

Archiving a Trainee

On the Trainees Tab, select one or more trainees, then click the archive button.

Search Trainees

☐ Select All

Group By: None ⬦

[Assign Task] [Assign Group of Tasks] [Delete] [Un-Archive] [Print] [Export]

[Print Barcodes]

+ Create New Trainee

Search

Division
Select division ⬦

First name
John

Last name
Smith

Phone
(###) ###-####

Badge ID

Employee #

Department
Select department ▾

Job Titles
Select job title ▾

Category
Select category ⬦

Only Supervisors
☐

Show Archived Trainees
☑

All Dates
⦿

Hire Date

[Search]

	Name	Phone	Badge Id	Employee #	Department	Category	Job Title		
☐	Bradley Brinton	800 234 9009	00010002	00010002	Engineering	Full Time	Electrical Tech I	☑	✕
☐	Cindy Crabtree	800 555 2333	00001003	00001003	Engineering	Full Time	Mechani... Tech III	☑	✕

These are the trainees we archived.

On the Trainees Tab, choose "Show Archived Trainees and click Search. This will show the archived trainees

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Search Assignments

+ Create New
Assignment

☐ Select All

Group By: Trainees ⊘   Print   Export

Search

Archived Training

This label will display when you are are looking at archived training assignments.

Division
Select division ⊘

Brinton, Bradley

Trainee name
Select Trainee ▾

Department
Select department ▾

	Task	Date Due	Completed Date	Expires Date		
☐	Payroll Form	04/30/2016			☑	✕
☐	EMT	09/30/2016	08/24/2016	08/24/2017	☑	✕
☐	Outside Training	05/17/2017			☑	✕
☐	CPR	05/17/2017			☑	✕
☐	Airfield Familiariza…	05/17/2017			☑	✕
☐	Forklift Training	10/20/2017	10/20/2017	10/20/2018	☑	✕
☐	Forklift Training	10/20/2018			☑	✕

Job title
Select job title ▾

Task name
Select task ▾

Task type

Date From

Date To

Crabtree, Cindy

All Assignments
⦿

	Task	Dat
☐	Payroll Form	04/
☐	Forklift Training	05/

On the Trainees Tab, click "Show Archived Training" to see archived training assignments.

Completed Assignments
○

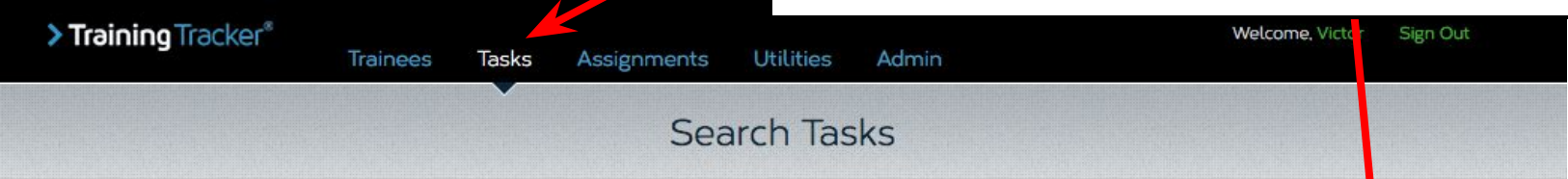Incomplete Assignments
○

Show Archived Training

Search

To **un-archive** someone, and put them back into active reporting, go back to the trainees tab, select the trainee, and click the "Un-Archive" button.

> **Training** Tracker®

Welcome, Victor   Sign Out

Trainees   Tasks   Assignments   Utilities   Admin

Search Trainees

+ Create New Trainee

☐ Select All
Group By: None ⌄   Assign Task   Assign Group of Tasks   Delete   Un-Archive   Print   Export

Print Barcodes

Search

Division
Select division ⌄

First name
John

Last name
Smith

Phone
(###) ###-####

Badge ID

Employee #

	Name	Phone	Badge Id	Employee #	Department	Category	Job Title		
☑	Bradley Brinton	800 234 9009	00010002	00010002	Engineering	Full Time	Electrical Tech I	☑	✕
☐	Cindy Crabtree	800 555 2333	00001003	00001003	Engineering	Full Time	Mechani... Tech III	☑	✕

Make a Task Inactive

First go to the Tasks tab and edit the task you want to make inactive.

Edit A Task

Task name

CPR

Division

All Divisions

Task Type

General Safety Training

Description

Red Cross

Cost

600

Inactive

☑

Created

04/20/2015 10:39 AM

Save Task   Cancel

Find the "Inactive" Check box, and check it, then save the task.