



How To Archive Training



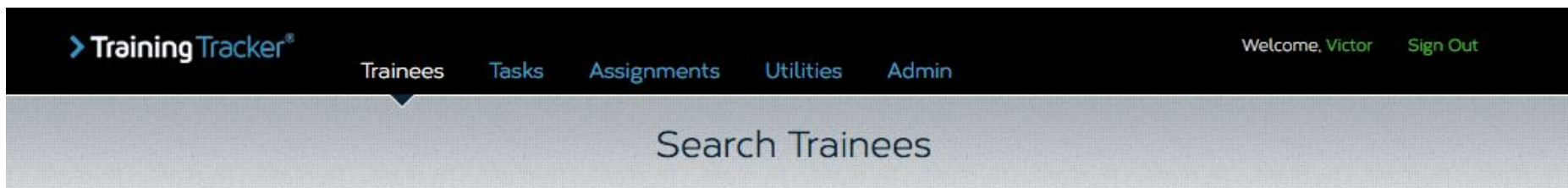
Deleting vs. Archiving

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



+ Create New Trainee

Search

Division

Select division

First name

John

Last name

Smith

Phone

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

Badge ID

Employee #

Department

Select All

Group By:

None

Assign Task

Assign Group of Tasks

Delete

Archive

Print

Export

Print Barcodes

	Name	Phone	Badge Id	Employee #	Department	Category	Job Title		
<input type="checkbox"/>	Antonio Alvarez	800 555 8776	00001520	00010001	Administrative	Full Time	Administ... Assistant II	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Bradley Brinton	800 234 9009	00010002	00010002	Engineering	Full Time	Electrical Tech I	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Cody Crabtree	800 555 2333	00001003	00001003	Engineering	Full Time	Mechani... Tech III	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	James Jurgens	(800) 555-4090	00001011	00001011	Engineering	Full Time	Operatio... Supervisor II	<input type="checkbox"/>	<input type="checkbox"/>

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

Search Trainees

+ 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

Use Date

Search

Select All

Group By: None

Assign Task

Assign Group of Tasks

Delete

Un-Archive

Print

Export

Print Barcodes

	Name	Phone	Badge Id	Employee #	Department	Category	Job Title		
<input type="checkbox"/>	Bradley Brinton	800 234 9009	00010002	00010002	Engineering	Full Time	Electrical Tech I		
<input type="checkbox"/>	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

Search Assignments

+ Create New Assignment

Search

Division
Select division

Trainee name
Select Trainee

Department
Select department

Job title
Select job title

Task name
Select task

Date From

Date To

All Assignments

Completed Assignments

Incomplete Assignments

Show Archived Training

Search

Select All

Group By: Trainees

Print

Export

Archived Training

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

Brinton, Bradley

	Task	Date Due	Completed Date	Expires Date		
<input type="checkbox"/>	Payroll Form	04/30/2016			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	EMT	09/30/2016	08/24/2016	08/24/2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Outside Training	05/17/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CPR	05/17/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Airfield Familiariza...	05/17/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Forklift Training	10/20/2017	10/20/2017	10/20/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Forklift Training	10/20/2018			<input checked="" type="checkbox"/>	<input type="checkbox"/>

Crabtree, Cindy

	Task	Date
<input type="checkbox"/>	Payroll Form	04/30/2016
<input type="checkbox"/>	Forklift Training	05/17/2017

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

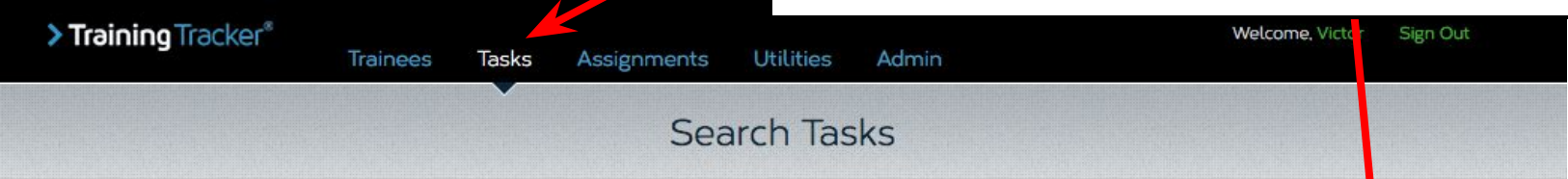
To **un-archive** someone, and put them back into active reporting, go back to the trainees tab, select the trainee, and click the “Un-Archive” button.

The screenshot shows the Training Tracker interface. At the top, there is a navigation bar with the following tabs: Trainees, Tasks, Assignments, Utilities, and Admin. The 'Trainees' tab is currently selected. In the top right corner, it says 'Welcome, Victor' and 'Sign Out'. Below the navigation bar is a search bar labeled 'Search Trainees'. On the left side, there is a sidebar with a green button labeled '+ Create New Trainee'. Below that is a search form with fields for 'Division' (a dropdown menu), 'First name' (text input with 'John'), 'Last name' (text input with 'Smith'), 'Phone' (text input with a mask '(###) ###-####'), 'Badge ID' (text input), and 'Employee #' (text input). The main content area displays a list of trainees. At the top of the list, there is a 'Select All' checkbox and a 'Group By' dropdown menu set to 'None'. To the right of the search bar are several action buttons: 'Assign Task', 'Assign Group of Tasks', 'Delete', 'Un-Archive', 'Print', 'Export', and 'Print Barcodes'. The 'Un-Archive' button is highlighted in red. The table below has the following columns: Name, Phone, Badge Id, Employee #, Department, Category, and Job Title. There are two rows of data. The first row is for Bradley Brinton, with a checked checkbox in the first column. The second row is for Cindy Crabtree, with an unchecked checkbox in the first column. Each row also has a green checkmark icon and a grey 'x' icon in the final column.

	Name	Phone	Badge Id	Employee #	Department	Category	Job Title		
<input checked="" type="checkbox"/>	Bradley Brinton	800 234 9009	00010002	00010002	Engineering	Full Time	Electrical Tech I		
<input type="checkbox"/>	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.



+ Create New Task

Search

Division
Select division

Task name

Task type
Select task type

Include Inactive Tasks

Search

Select All

Group By: None

Group Selected Delete Selected Print Export

	Task	Division	Task Type	Cost	Hours	CEUs	
<input type="checkbox"/>	CPR	All Divisions	General Safety Training	600	3.25	0.25	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓	Years: 2					
	Expires: ✓	Years: 2					
<input type="checkbox"/>	EMT	All Divisions	General Safety Training	200			<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓	Years: 1					
	Expires: ✓	Years: 1					
<input type="checkbox"/>	First Aid	Computer Directions	General Safety Training				<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓	Years: 1					
	Expires: ✓						

Edit A Task

Task name**Division****Task Type****Description****Cost****Inactive****Created**

04/20/2015 10:39 AM

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

Search Assignm

+ Create New Assignment

Search

Division

Select division

Trainee name

Select Trainee

Department

Select department

Job title

Select job title

Inactive



Created

04/20/2015 10:39 AM

Save Task

Cancel

Select All

Group By: Tasks

Assign Task

Com

CPR

	Trainee	Date Due	Com
<input type="checkbox"/>	Jurgens, James	07/31/2016	07/2
<input type="checkbox"/>	Alvarez, Antonio	11/18/2016	11/0

On the Assignments tab, assignments associated with the inactive task will continue to show. People did complete the task.

However, you will not be able to create any new assignments for that task.

6/2017

03/06/2019

6/2017

03/06/2019

