



How To Email Trainees in Training Tracker 7 Web



Overview

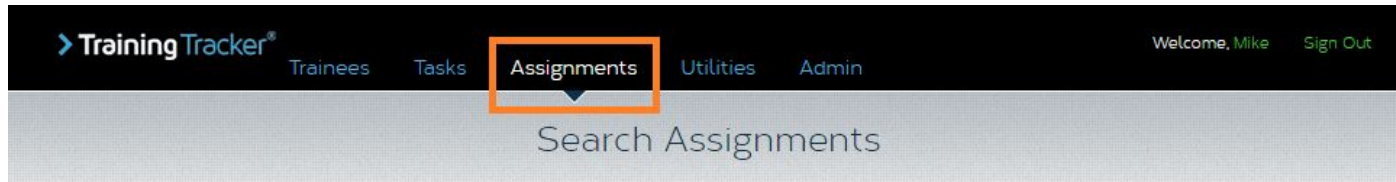
[Email](#)[Print](#)[Export](#)[Print Class Roll](#)

With a few clicks, you can email trainees in Training Tracker 7 Web. Emails can show both completed or due from Trainees -- anything you can show in the Assignments tab.

The basic process:

1. Go to the Assignments page
2. Search by criteria in left column
3. Click the green “Email” button
4. Choose Trainees or Supervisors, or both
5. Click “Send” to deliver email notifications

1. Go to the Assignments page



+ Create New Assignment

Search

Division

Select division

Trainee name

Select trainee

Department

Select department

Job title

Select job title

Task name

Select task

Task type

Select task type

All Dates



Date Due



Completed Date



Expires Date



Date From

.....

Select All

Group By:

Assign Task

Complete Selected

Delete Selected

Email

Print

Export

Print Class Roll

	Trainee	Task	Date Due	Completed Date	Expires Date		
<input type="checkbox"/>	Ortiz, Chris	Mine Safety Training	12/22/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Castor, Alyssa	Mine Safety Training	12/27/2016	09/12/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Joe C	Mine Safety Training	12/27/2016	12/12/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smith, Steven	Mine Safety Training	12/30/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Castor, Alyssa	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smith, Steven	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Joe C	New New Hire Paperwork	12/31/2016			<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. Search by criteria in left column

TrainingTracker®
Welcome, Mike Sign Out

Trainees Tasks Assignments Utilities Admin

Search Assignments

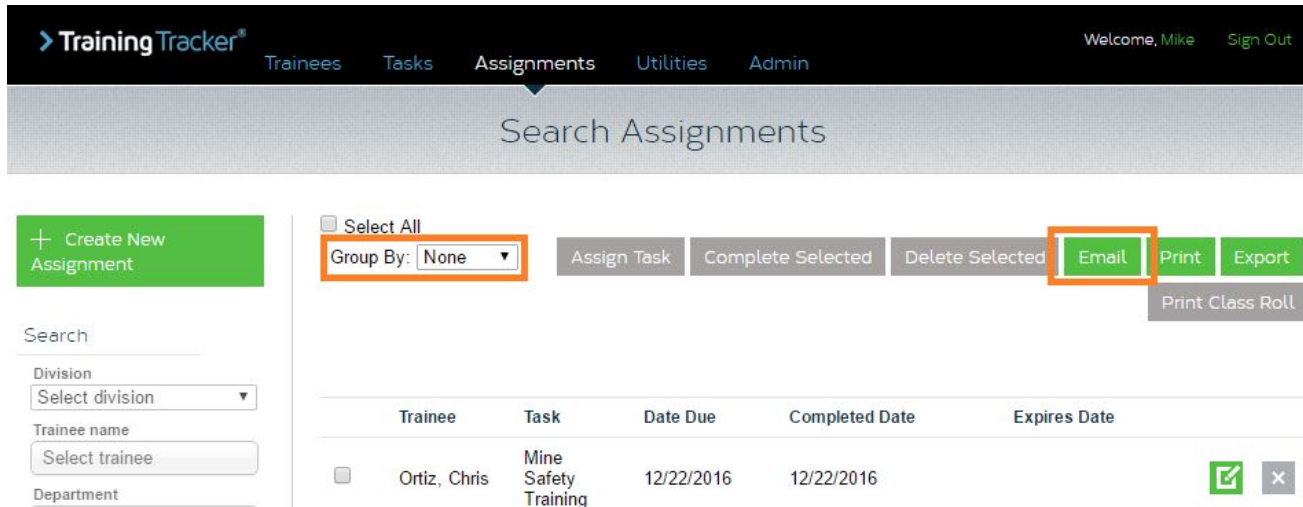
+ Create New Assignment

Select All
Group By: None Assign Task Complete Selected Delete Selected Email Print Export
Print Class Roll

	Trainee	Task	Date Due	Completed Date	Expires Date		
<input type="checkbox"/>	Ortiz, Chris	Mine Safety Training	12/22/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Castor, Alyssa	Mine Safety Training	12/27/2016	09/12/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Joe C	Mine Safety Training	12/27/2016	12/12/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smith, Steven	Mine Safety Training	12/30/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Joe C	New New Hire Paperwork	12/31/2016			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smith, Steven	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Ortiz, Chris	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Castor, Alyssa	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	O'Neill, Paul	CPR2	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Soriano, Alfonso	Hazmat Safety & Training	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Rebecca	CPR2	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Brosius, Scott	CPR2	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Choose your search criteria on the left.
- Click green Search button when done

3. Group, and then click the green Email button



The screenshot shows the Training Tracker interface. The top navigation bar includes 'Training Tracker', 'Trainees', 'Tasks', 'Assignments', 'Utilities', and 'Admin'. The user is logged in as 'Mike' and can 'Sign Out'. The main heading is 'Search Assignments'. On the left, there is a 'Create New Assignment' button and search filters for 'Division', 'Trainee name', and 'Department'. The main area features a 'Select All' checkbox, a 'Group By' dropdown menu (set to 'None'), and action buttons: 'Assign Task', 'Complete Selected', 'Delete Selected', 'Email', 'Print', 'Export', and 'Print Class Roll'. Below these is a table with columns: 'Trainee', 'Task', 'Date Due', 'Completed Date', and 'Expires Date'. One entry is visible for 'Ortiz, Chris' with 'Mine Safety Training' due on 12/22/2016 and completed on 12/22/2016. A green checkmark icon and a close button are next to the entry.

Trainee	Task	Date Due	Completed Date	Expires Date
<input type="checkbox"/> Ortiz, Chris	Mine Safety Training	12/22/2016	12/22/2016	

- Once a search has been made, group by trainees.
- Grouping does not affect which emails are sent, but it will show you what each trainee will receive.
- Also, checkboxes have no bearing on emails.
- Click the green “Email” button
- A confirmation box will appear

4. Choose Trainees or Supervisors, or both

Email Assignment Notifications

This will email all of the trainees listed in your search (not just the ones you've selected, or just the ones on the current page, but everyone listed). If you click cancel, and group by trainee, you will see what each trainee's email will contain. If you choose supervisor (or both) an email will go to the trainee's supervisor, if applicable.

Send notifications to:

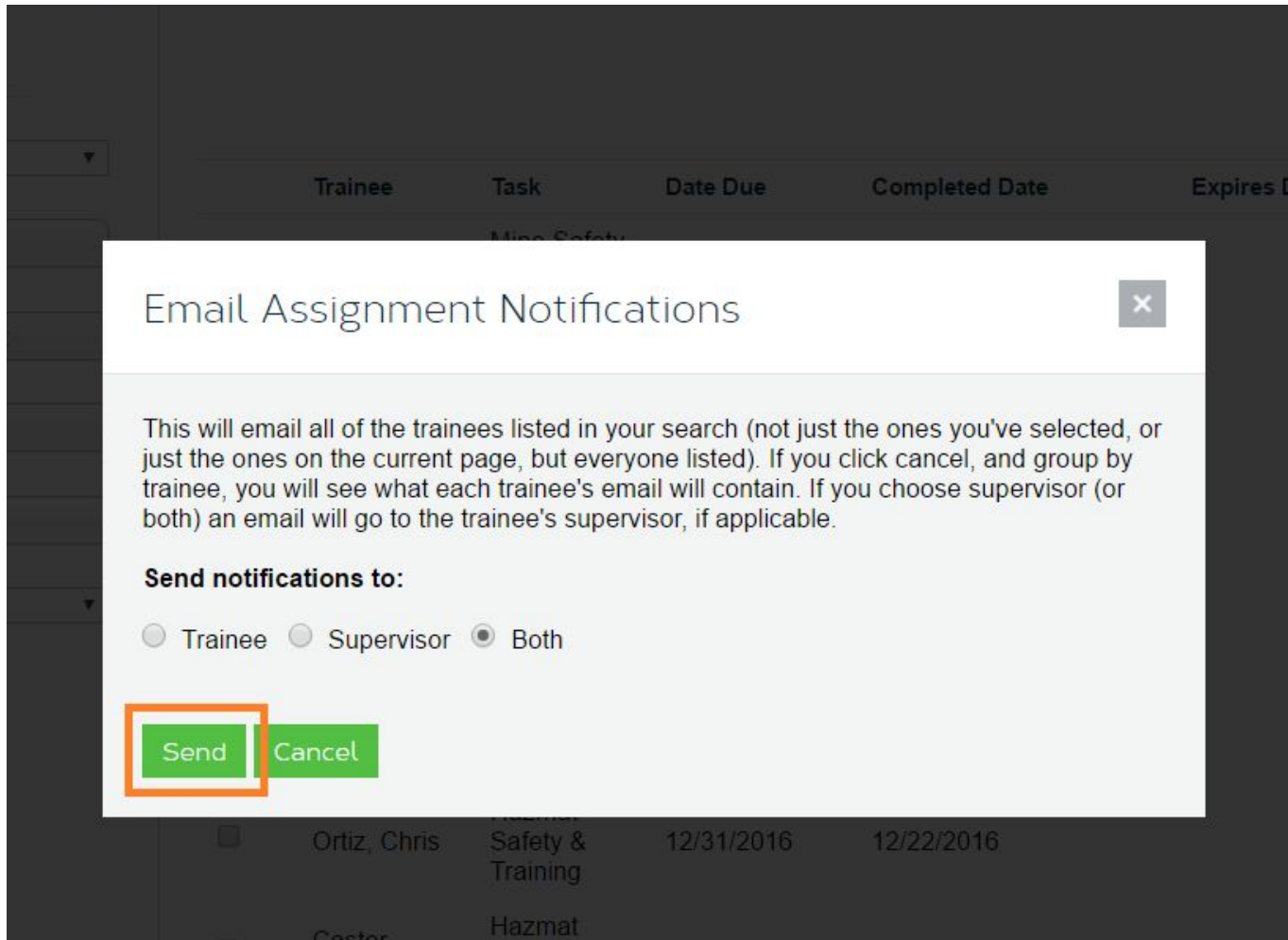
Trainee Supervisor Both

Send Cancel

Trainee	Task	Date Due	Completed Date	Expires D
Ortiz, Chris	Safety & Training	12/31/2016	12/22/2016	
Caster	Hazmat			

- Choose Trainees, their Supervisors, or both
- ALL trainees from the search will be included, not just the ones currently viewable on the page

5. Click “Send” to deliver email notifications



- Click the green “Send” button to deliver the email notifications
- Trainees receive one email each with all their assignments
- Supervisors receive one email per trainee

Email Example 1: Basic To-Do Report

Create New Assignment

Search

Division
Select division

Trainee name
Select trainee

Department
Select department

Job title
Select job title

Task name
Select task

Task type
Select task type

All Dates
 Date Due
 Completed Date
 Expires Date

Date From
yyyy-mm-dd

Date To
yyyy-mm-dd

All Assignments
 Completed Assignments
 Incomplete Assignments

Search

Group By: None

Assign Task Complete Selected Delete Selected Email Print Export

Print Class Roll

	Trainee	Task	Date Due	Completed Date	Expires Date		
<input type="checkbox"/>	Allen, Joe C	New Hire Paperwork	12/31/2016			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Jeter, Derek	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Rebecca	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Brosius, Scott	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Curtis, Chad	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Cone, David	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Girardi, Joe	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Mantle, Mickey	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Knoblauch, Chuck	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Larson, Don	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Brosius, Scott	Hazmat Safety & Training	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Girardi, Joe	Hazmat Safety & Training	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Ortiz, David	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Williams, Bernie	CPR Cert	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	...	Hazmat Safety & Training	02/28/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Search by Incomplete Assignments to see all assignments without a Completed Date
- Include Date Due and a Date Range to see all assignments due in a specified date range
- Group By Trainees if desired

Email Example 2: Calendar Year Completed Training

Create New Assignment

Search

Division
Select division

Trainee name
Select trainee

Department
Select department

Job title
Select job title

Task name
Select task

Task type
Select task type

All Dates

Date Due

Completed Date

Expires Date

Date From
2016-01-01

Date To
2016-12-31

All Assignments

Completed Assignments

Incomplete Assignments

Search

Group By: None

Assign Task Complete Selected Delete Selected Email Print Export

Print Class Roll

	Trainee	Task	Date Due	Completed Date	Expires Date		
<input type="checkbox"/>	Ortiz, Chris	Mine Safety Training	12/22/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Allen, Joe C	Mine Safety Training	12/27/2016	12/12/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Castor, Alyssa	Mine Safety Training	12/27/2016	09/12/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smith, Steven	Mine Safety Training	12/30/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Ortiz, Chris	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Castor, Alyssa	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smith, Steven	Hazmat Safety & Training	12/31/2016	12/22/2016		<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Search by Completed Assignments
- Include Completed Date and a Date Range of all of 2016 to see all assignments completed in 2016
- Group By Trainees if desired