IndustrySafe Training Class Schedule Guide

This guide describes the process for scheduling a training class or recording training results up in the IndustrySafe Safety Management Software. This guide assumes that employee records have been imported into IndustrySafe and that the training class catalog has been set up.
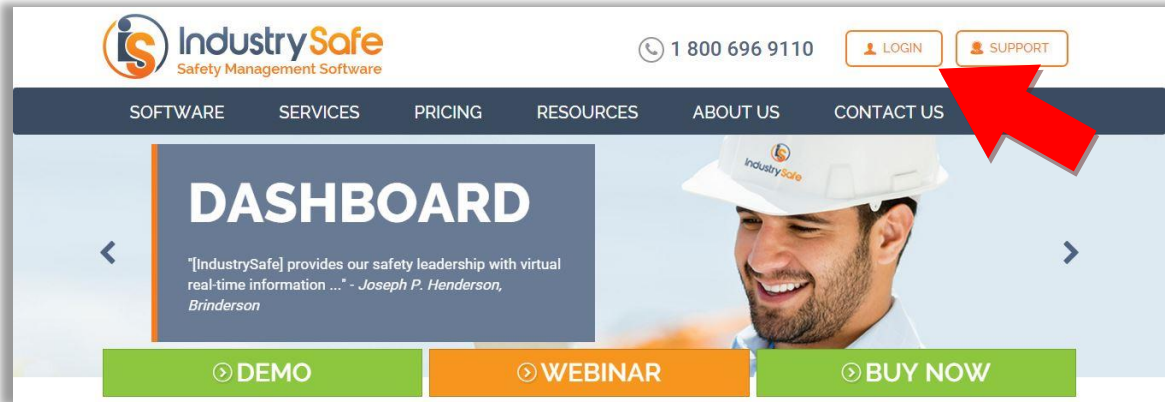
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1 Log in to IndustrySafe

Using your preferred browser, go to http://www.industrysafe.com

Click on the ***Login*** button at the top right corner of the page.

Enter your username and password and click the ***Submit*** button.
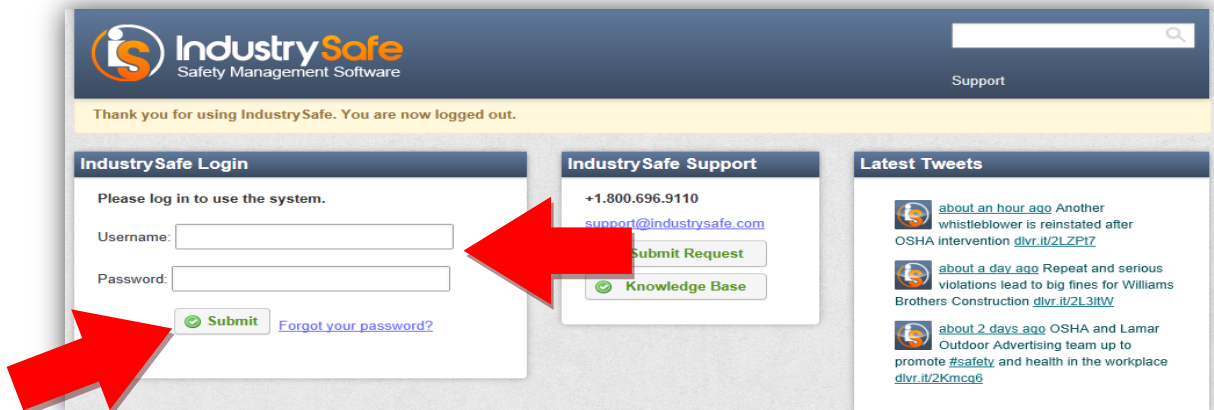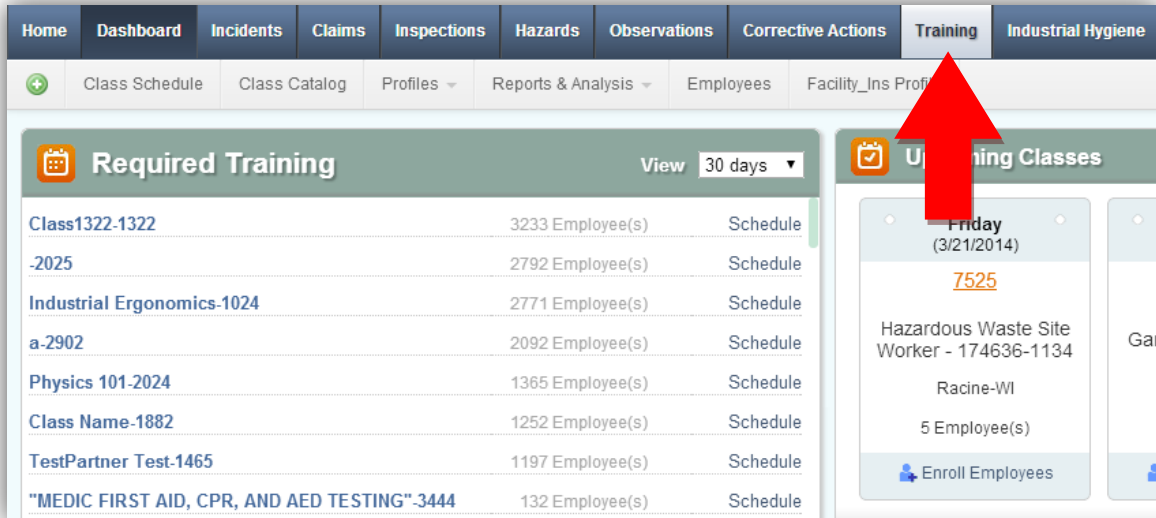

Note: If you forget your username or password, click the ***Forgot your password?*** button to have your username and a new password emailed to you. The next time you log in you will be asked to change your password.
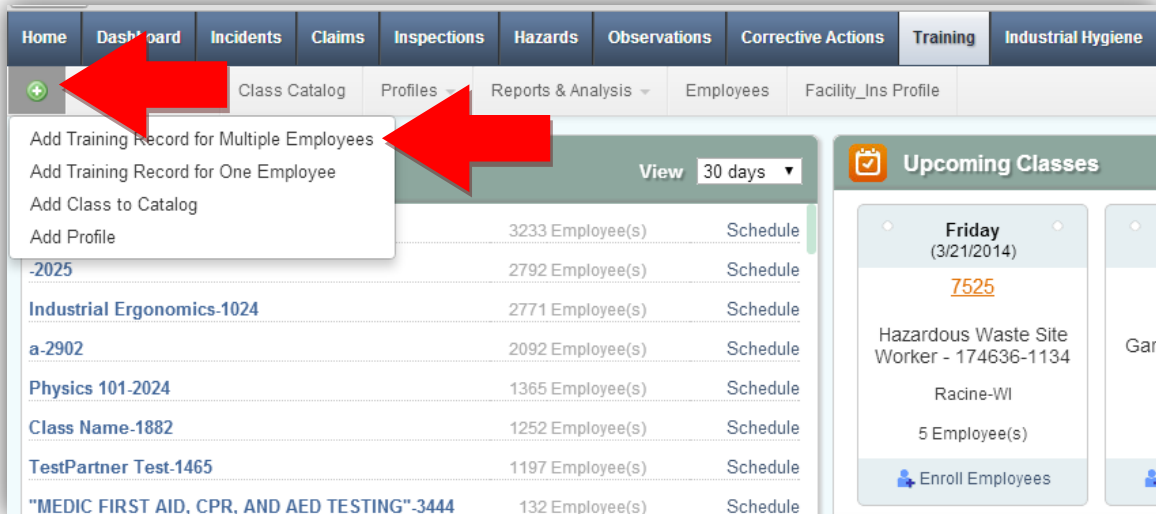
2 Open the Training Module

2.1 Add a Class Schedule Form

Click on the ***Training*** tab

Click on the ➕ icon, and select ***Add Training Record for Multiple Employees.***

You will be brought to a blank Class Schedule Form

3 Complete the Class Schedule Form

3.1 Basic Information
Fill in the basic Information for the Class Schedule Form

3.2 Class Roster
Complete the Class Roster section and click the ***Update Class Roster/Results*** button.

3.3 Add / Invite Employees

Find employees using the filters in the Filter Employees box. The list of employees appears in the Available Employees box. You may select multiple employees at once and use the Enroll ➡ / Invite 📧 buttons to enroll or invite employees. Remove employees from the class by selecting them in the Class Roster box and clicking the withdrawal button ⬅.

Click **_Save_** to save your work and remain on the Class Roster page.

Click **_Save and Continue_** to save your work and open the Class Results page.

Click **_Back_** to return to the Class Schedule Form.

3.4 Update Class Results

Click the **_Results_** Tab to open the results page.

(1) On this screen you will be able to mark down who attended the class, the hours attended, if the employee passed the class, and when the class was attended.

Note: If your organization has purchased IndustrySafe's training content add-on, training results for an online course will be automatically updated. You will be able to view, but not edit, the results of an online training course.

(2) You can see the next required date in this view, as well as mark that the class is no longer required.

(3) Print certificates and attach files to employees using the icons next to the employee names.

(4) Lastly you can quickly view the number of employees who attended and passed the class.

3.5 Save and Return to Class Schedule Form

Once you have finished updating the roster and results of the class, **_Save_** your work and then click **_Back_** to return to the Class Schedule Form.
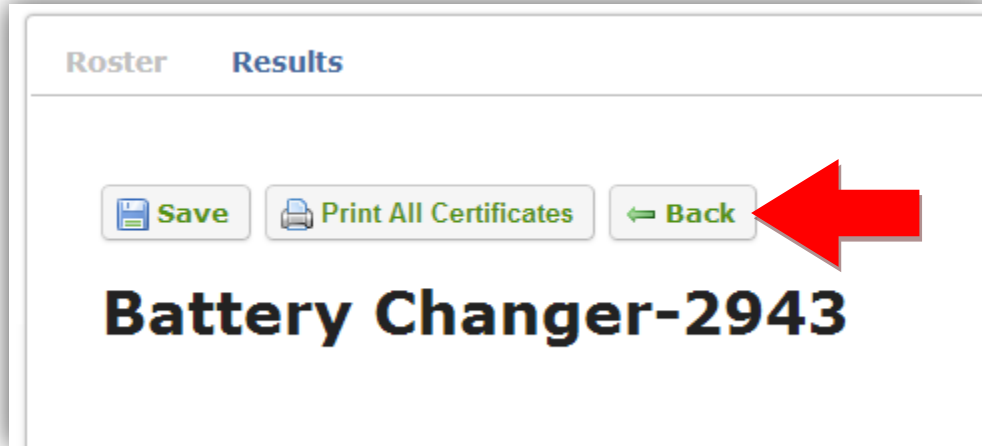
Note: Click **_Print All Certificates_** to generate certificates for all employees that passed the class.

(1) When you return to the Class Schedule form, you can quickly see all the invited and enrolled employees as well as all the employees who attended the class and all the employees who passed the class.
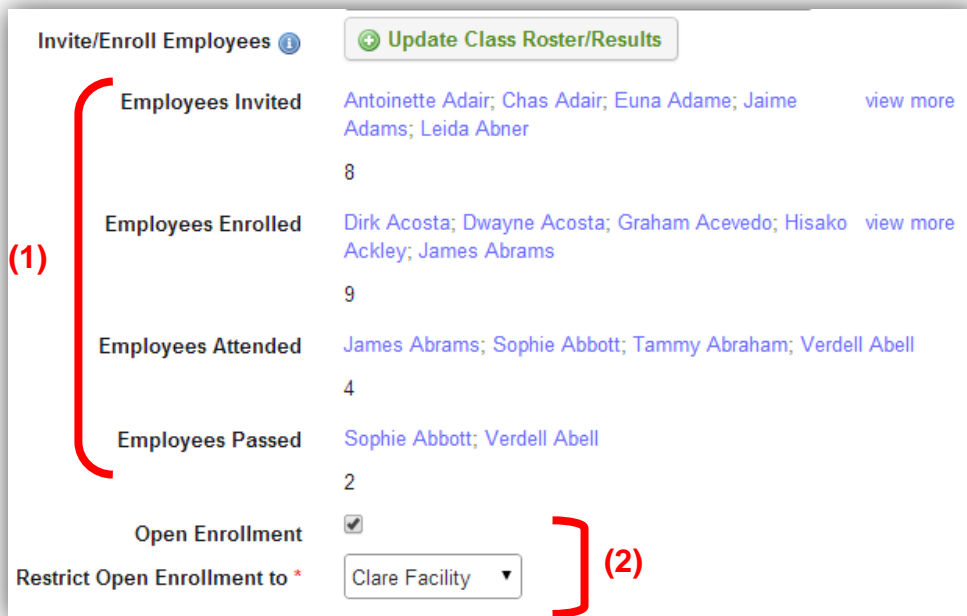
(2) You can also enable the open enrollment feature to allow any user to enroll in the class using the calendar feature and restrict the open enrolment to users at specific location.

If you enable open enrollment, the enrollment will be capped at the number of employees specified in the Max Size field.

4 Additional Features

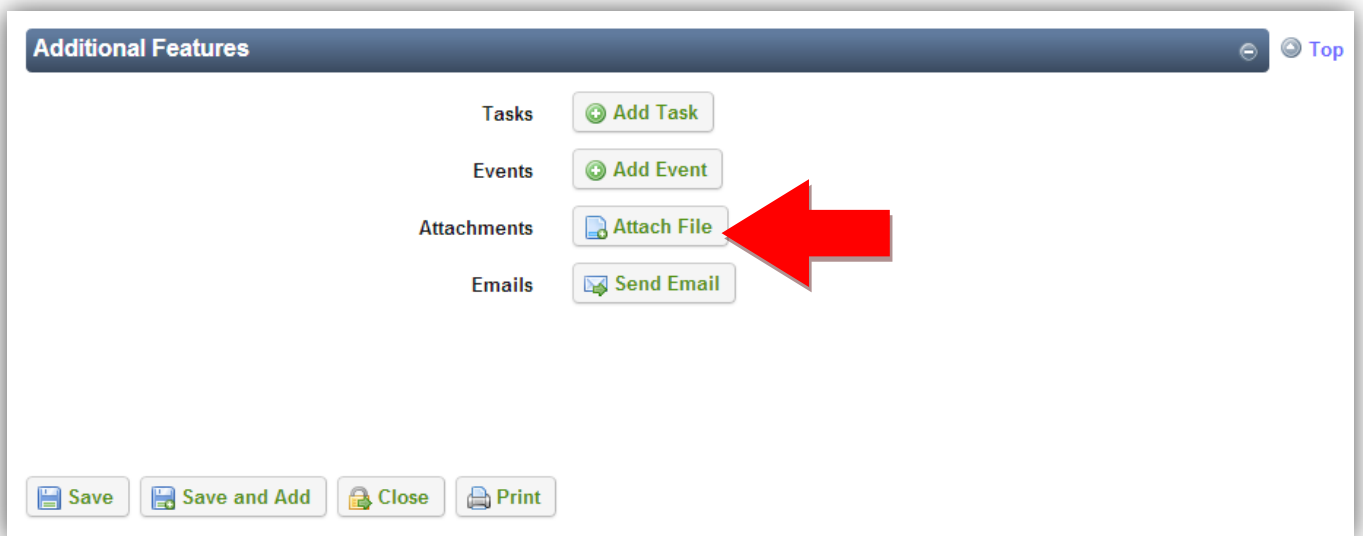## 4.1 Attach a File

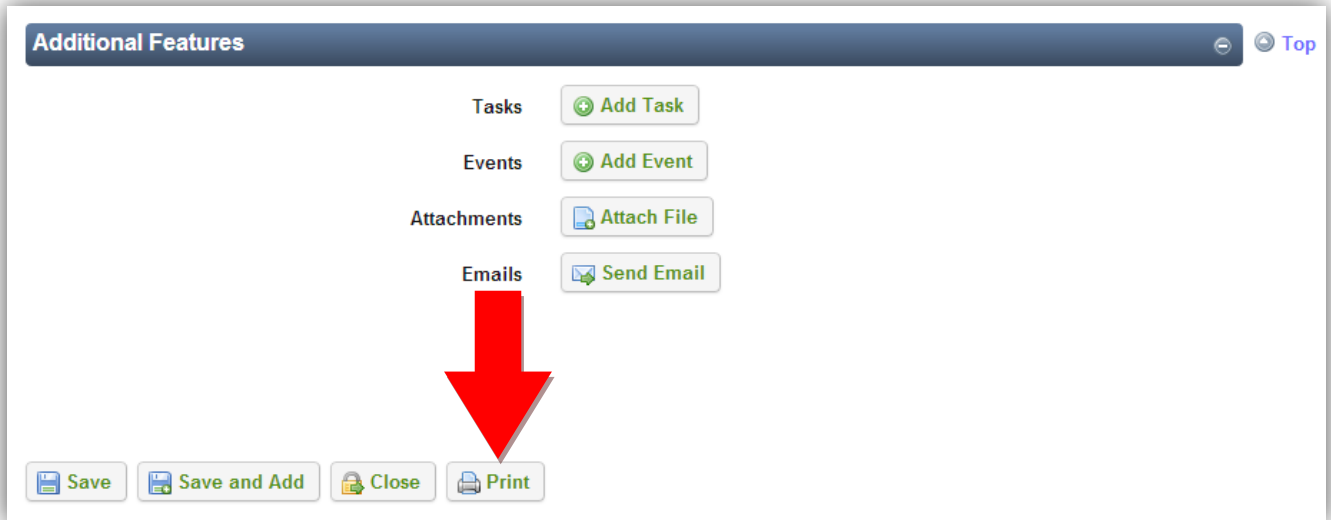To attach supporting documents (Photos, etc.), click the ***Attach File*** button.
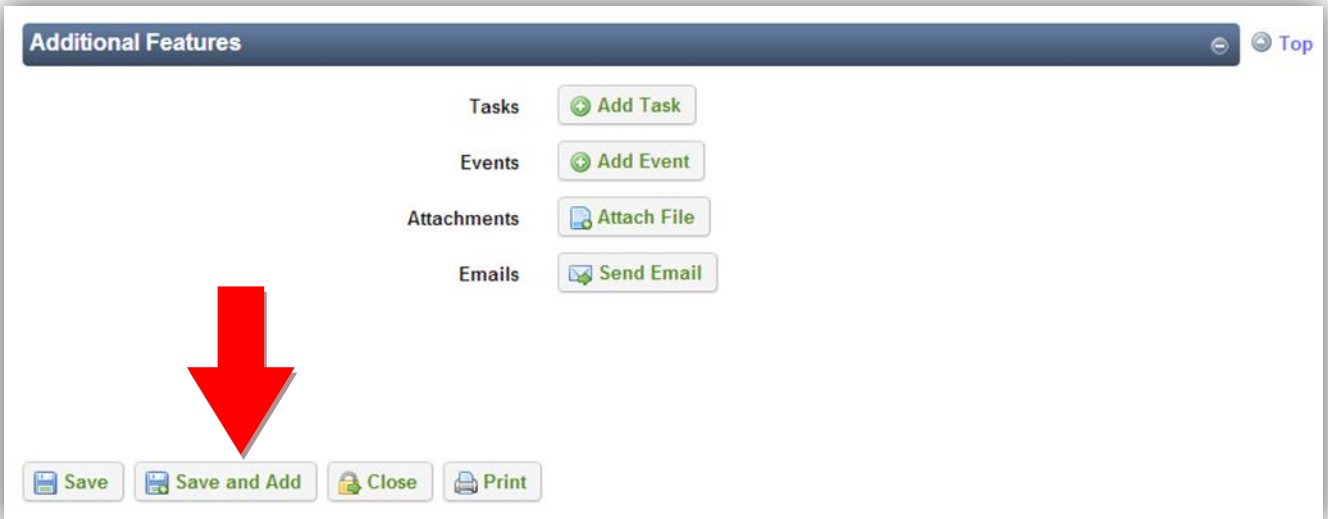
4.2 Print

To view a print-out of the Class Roster, click the ***Print*** button.

4.3 Copy Employees and Results to a New Class

To copy the list of employees to a new class, click the ***Save and Add*** button.

When using the Save and Add feature, the list of Employees and attendance results are copied to the new class.

5 General Notes about IndustrySafe

- Fields with a red * are required.

- Ensure that your browser allows pop-ups from IndustrySafe. This is required for certain features such as printing reports and attaching supporting documents.

- You may save the form at any time to ensure that you do not lose your work (even if you have not completed all required fields).

- If you do not save or refresh the screen for 30 minutes you will be logged out due to inactivity. Upon automatic logout, any form that you may have open on the screen will be saved. A pop-up will alert you before this happens.

- Additional help may be obtained by clicking the Help icon within the navigation pane at the top of the screen.