

# 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.

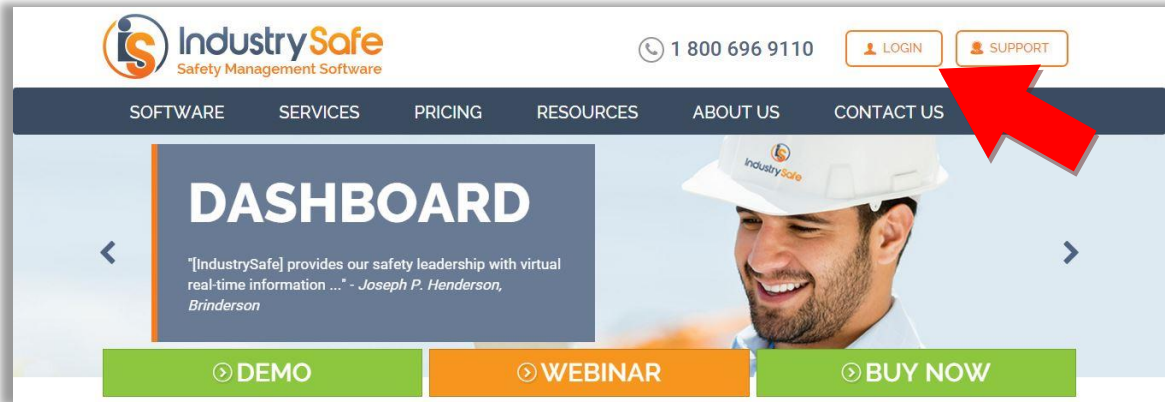
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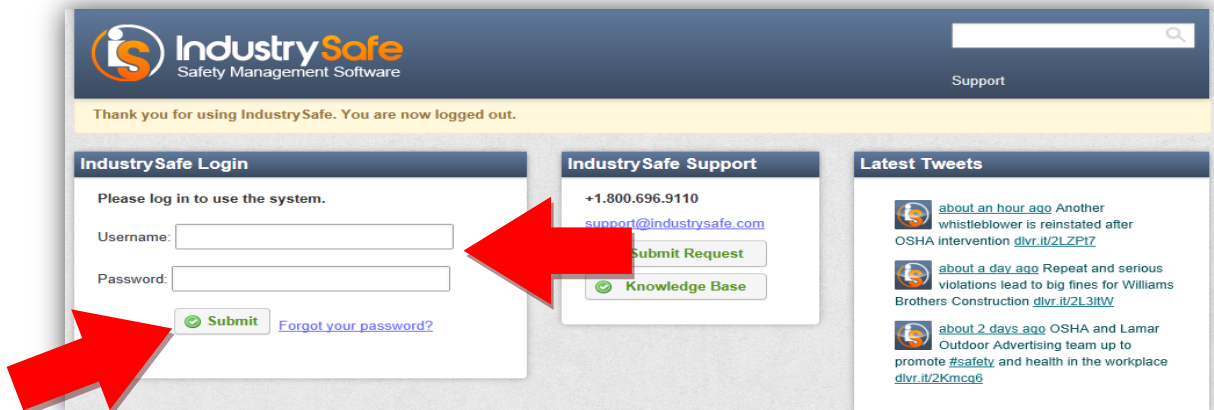
# 1 Log in to IndustrySafe

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.

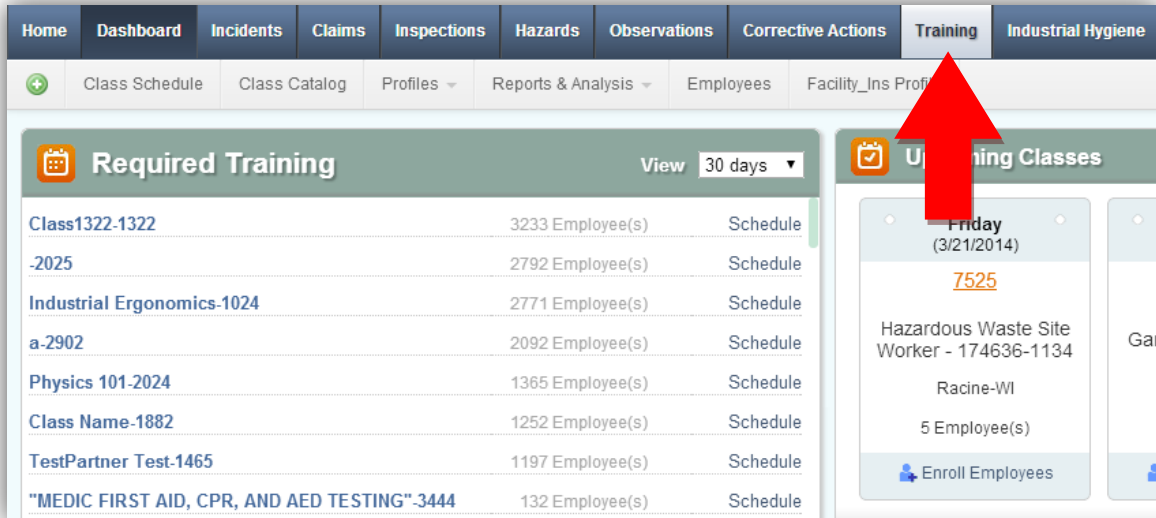


**Note:** If you forget your username or password, click the **Forgot your password?** button to have your username and a new password emailed to you. The next time you log in you will be asked to change your password.

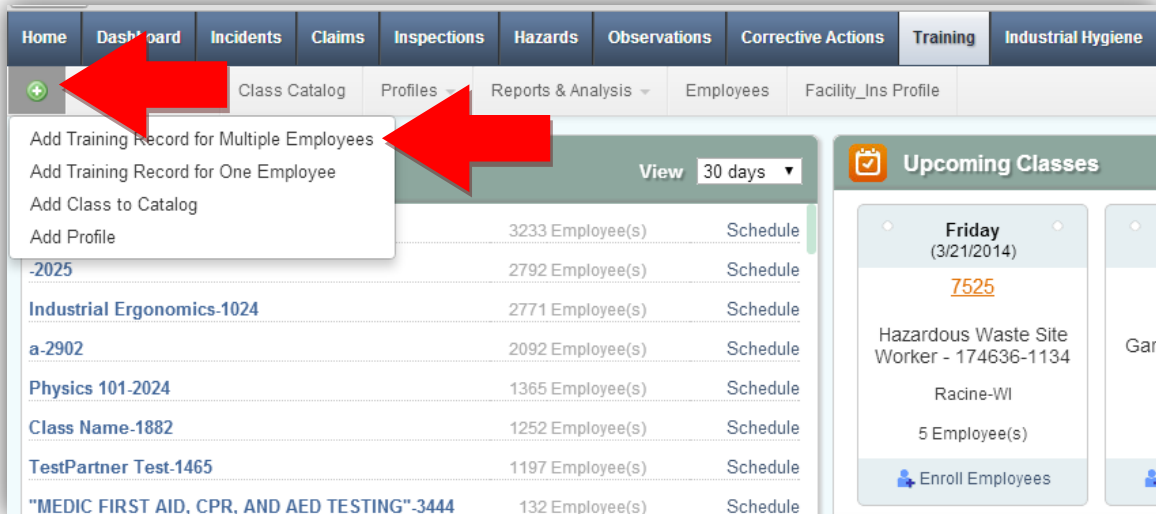
## 2 Open the Training Module

### 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

The screenshot shows the 'Basic Information' form with the following fields and options:

- Buttons: Save, Save and Add, Delete, Close, Print
- Navigation: Basic Information | Class Roster | Additional Features | History Section
- Form Fields:
  - Business Group \* (dropdown)
  - Region \* (dropdown)
  - Division \* (dropdown)
  - Facility \* (text input with placeholder "Start typing name here")
  - Class Name \* (dropdown)
- Table:

Training Class Category	Training Delivery	Vendor	Description
Hours - Classroom	Hours - Field	Retraining Cycle	

#### 3.2 Class Roster




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

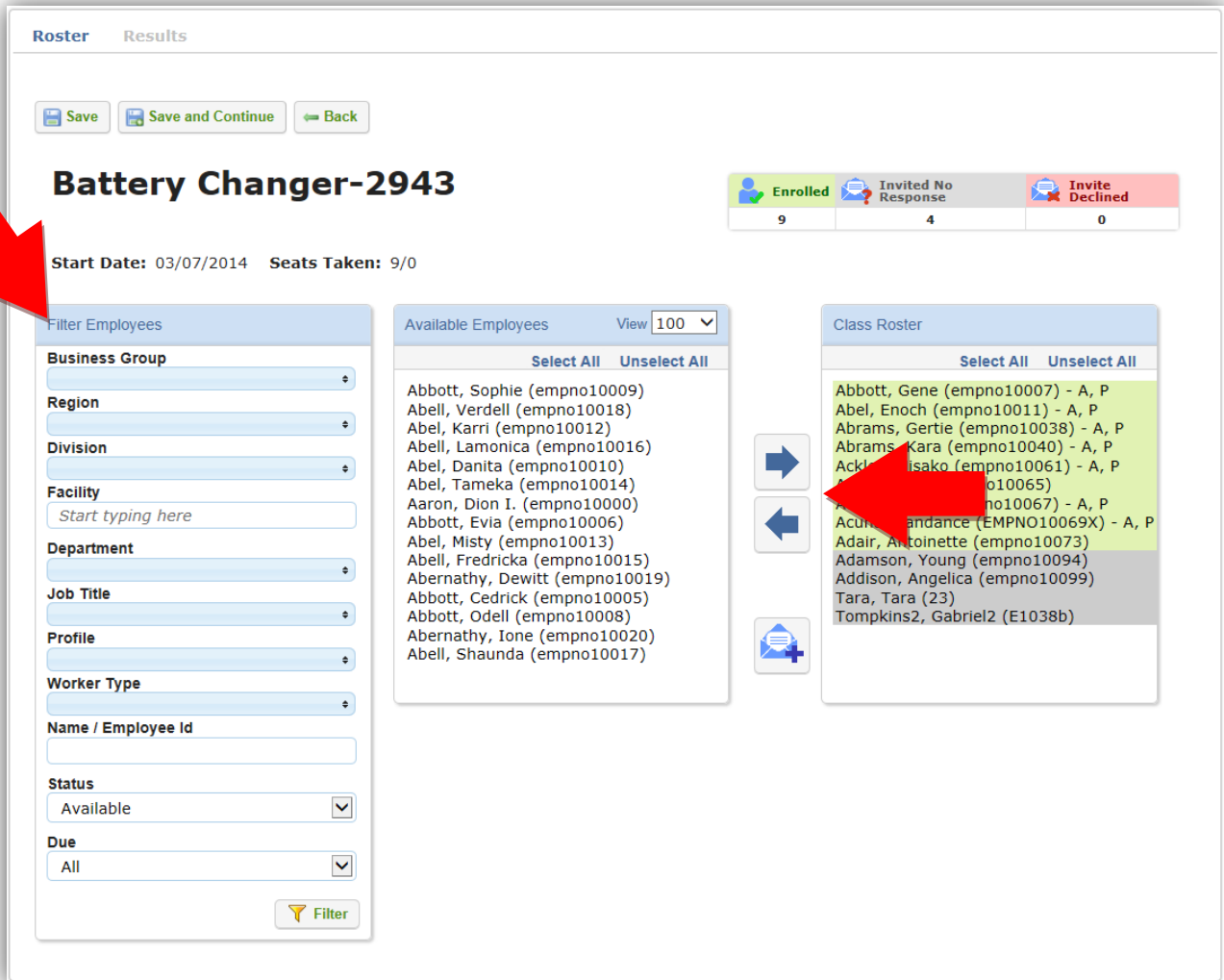
The screenshot shows the 'Class Roster' form with the following fields and options:

- Form Fields:
  - Date Assigned: 3/19/2014 (calendar icon)
  - Start Date \* (calendar icon)
  - Start Time: HHMM
  - End Date \* (calendar icon)
  - Location: (text input)
  - Instructor 1 (dropdown)
  - Session Notes: (text area)
  - Max Size: 0
- Buttons:
  - Invite/Enroll Employees (info icon)
  - Update Class Roster/Results (green button with plus icon)

A red arrow points to 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 .



**Battery Changer-2943**

Start Date: 03/07/2014    Seats Taken: 9/0

Enrolled	Invited No Response	Invite Declined
9	4	0

**Filter Employees**

Business Group  
Region  
Division  
Facility  
Department  
Job Title  
Profile  
Worker Type  
Name / Employee Id  
Status: Available  
Due: All

**Available Employees** (View: 100)

- Abbott, Sophie (empno10009)
- Abell, Verdell (empno10018)
- Abel, Karri (empno10012)
- Abell, Lamonica (empno10016)
- Abel, Danita (empno10010)
- Abel, Tameka (empno10014)
- Aaron, Dion I. (empno10000)
- Abbott, Evia (empno10006)
- Abel, Misty (empno10013)
- Abell, Fredricka (empno10015)
- Abernathy, Dewitt (empno10019)
- Abbott, Cedrick (empno10005)
- Abbott, Odell (empno10008)
- Abernathy, Ione (empno10020)
- Abell, Shaunda (empno10017)

**Class Roster**

- Abbott, Gene (empno10007) - A, P
- Abel, Enoch (empno10011) - A, P
- Abrams, Gertie (empno10038) - A, P
- Abrams, Kara (empno10040) - A, P
- Ackl, Isako (empno10061) - A, P
- ... (empno10065)
- ... (empno10067) - A, P
- Acun, Candance (EMPNO10069X) - A, P
- Adair, Antoinette (empno10073)
- Adamson, Young (empno10094)
- Addison, Angelica (empno10099)
- Tara, Tara (23)
- Tompkins2, Gabriel2 (E1038b)

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.

The screenshot displays the 'Results' page for the class 'Battery Changer-2943'. At the top, there are buttons for 'Save', 'Print All Certificates', and 'Back'. A summary bar shows 'Attended Class' and 'Passed Class' counts, both at 14. Below this is a table with the following columns: 'Attended Class', 'Hours Attended', 'Pass Class', 'Date Attended', 'Next Required Date', and 'Class No Longer Required'. The table lists several employees, including GENE ABBOTT, ENOCH ABEL, GERTIE ABRAMS, KARA ABRAMS, HISAKO ACKLEY, RIMA ACOSTA, and CANDANCE ACUNA. Each row has a checkbox for 'Attended Class', a text input for 'Hours Attended' (all set to 0.00), a checkbox for 'Pass Class', a date input for 'Date Attended' (all set to 03/07/2014), a date input for 'Next Required Date' (all set to 03/07/2017), and a checkbox for 'Class No Longer Required'. A 'view 100' dropdown is located to the right of the table. A red arrow points to the 'Results' tab in the top navigation. Red callouts (1) through (4) highlight these features: (1) the table columns, (2) the 'Next Required Date' and 'Class No Longer Required' columns, (3) the print and attach icons for each employee, and (4) the summary statistics.

(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.

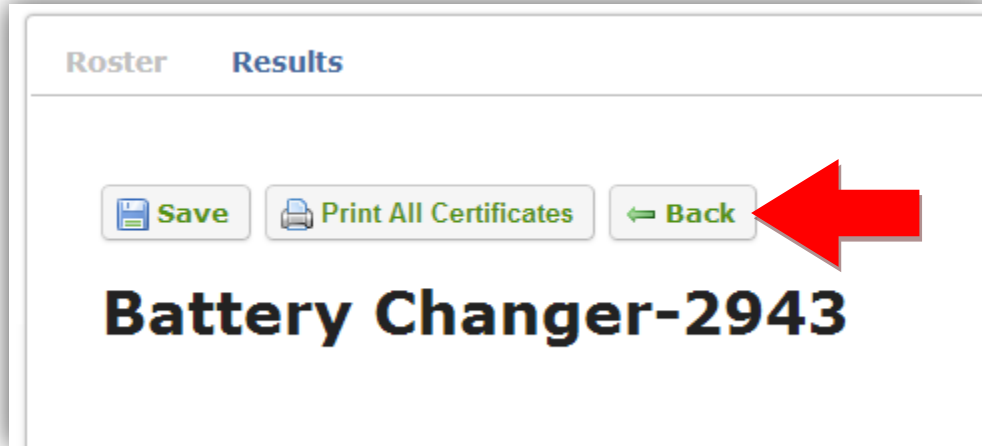
(2) You can see the next required date in this view, as well as mark that the class is no longer required.

(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.

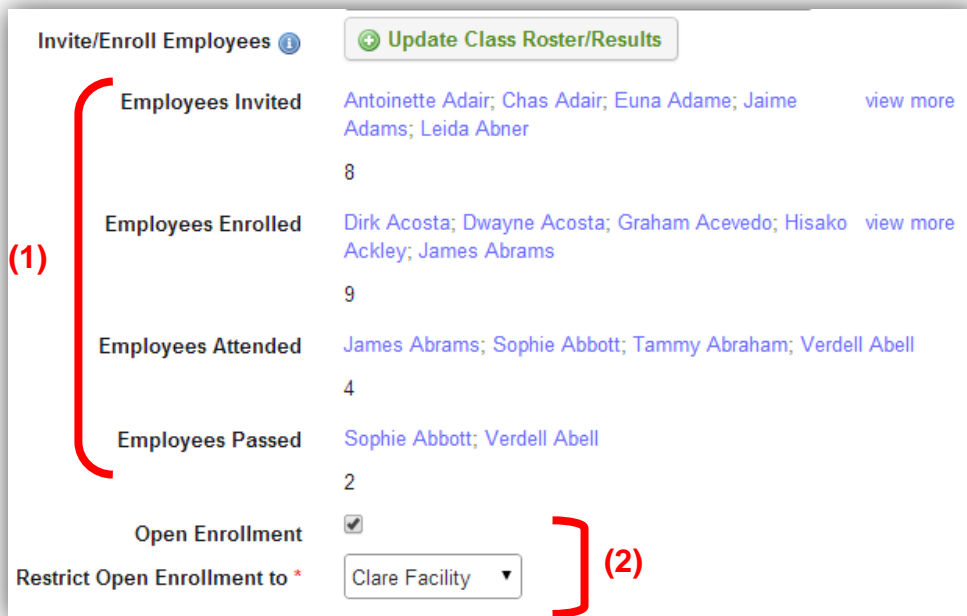
### 3.5 Save and Return to Class Schedule Form

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.



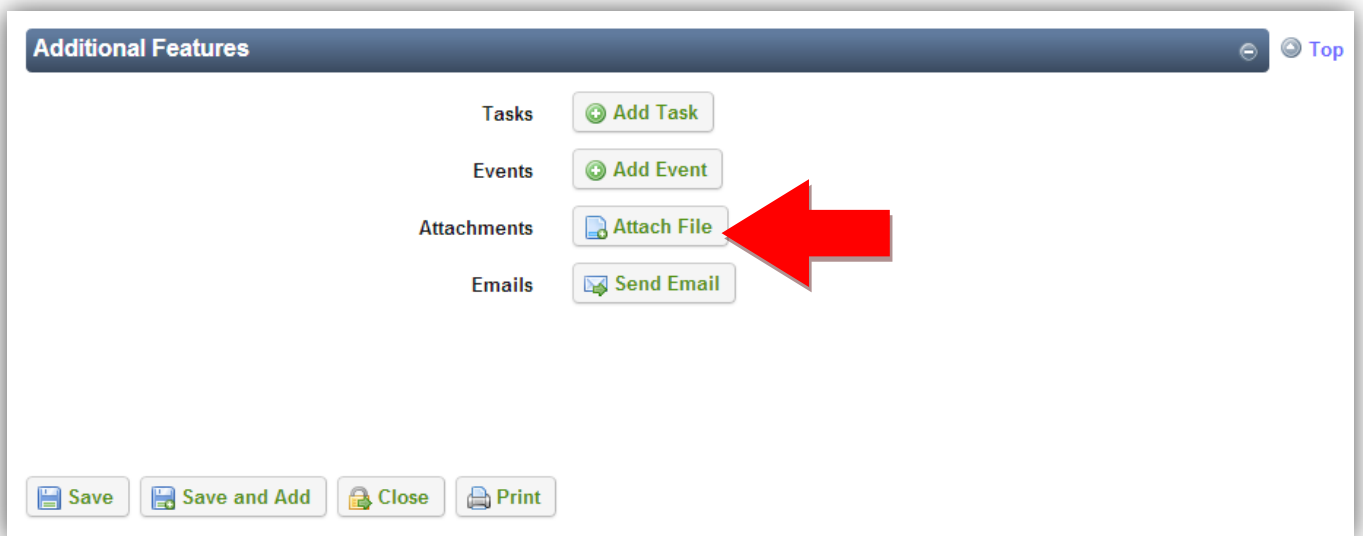
(2) You can also enable the open enrollment feature to allow any user to enroll in the class using the calendar feature and restrict the open enrolment to users at specific location.

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

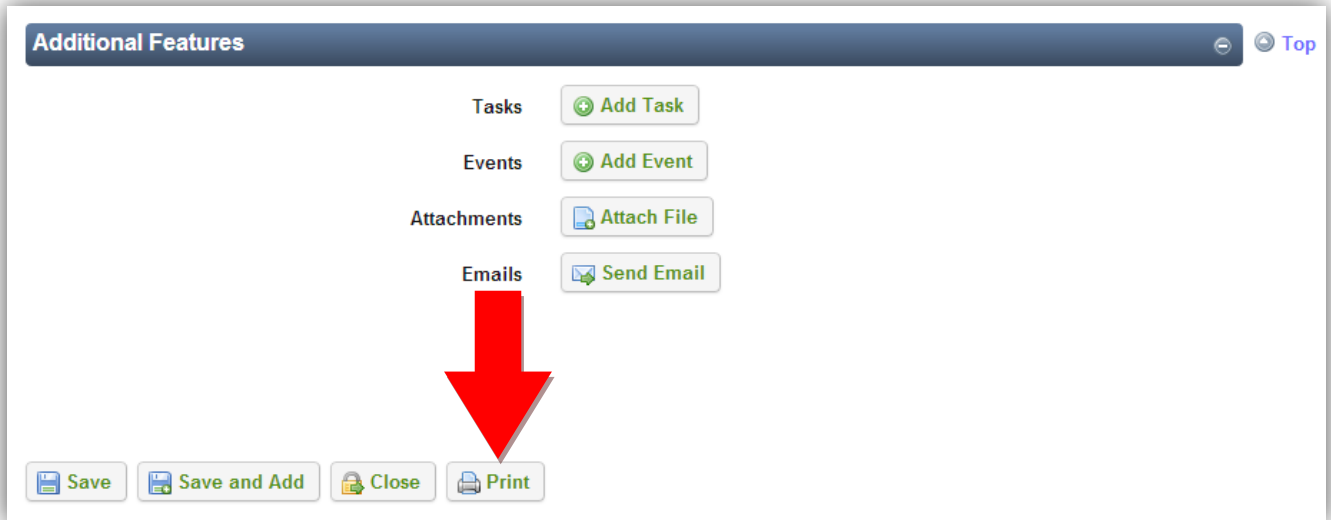
To attach supporting documents (Photos, etc.), click the **Attach File** button.





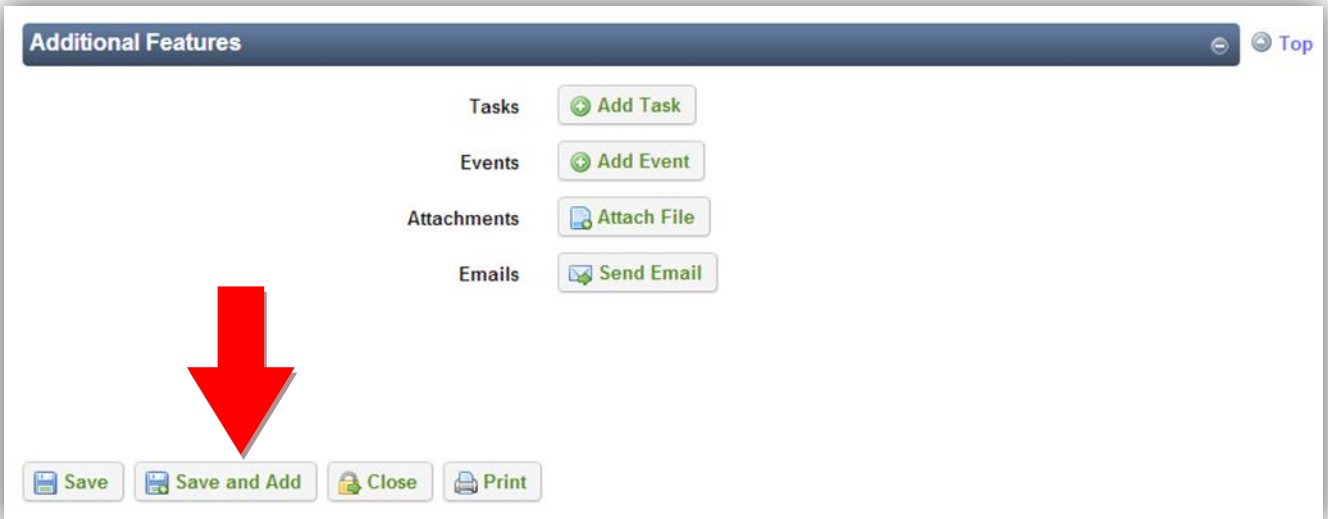
## 4.2 Print

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.

