## Training Register - Reporting Entity functionality

* Log in as a User with a Role with the following Permissions: training-summary, training-view, training-create, training-update, training-delete
* Navigate to Training Register

#### Training Assignments

**Create new Training Assignment**

* Click the Activities fan in the training register, then click on +Activity to create a new Assignment, this opens the Create Training Activity Assignment form on the Select Activity step of the form
* Filter by Provider or search Assignments by name to filter the list of Training Assignments
* Click the arrow icon to the left of an Assignment to see additional information about the Assignment
* Click Select to select an Assignment, this opens the Select Staff Members step of the form
* Filter by Status or Role or search Staff Members by name to filter the list of Staff Members
* Click the Select All button or Select specific Staff Members
* Click Next to move to the Set Date step of the form
* Enter the Due Date, this then opens the Confirm screen in the form and displays warnings if any staff members are already booked for having Assignments completed on that date
* Click Create to create the Training Assignment

**View Training Assignments**

* Filter by Status or Provider or search Training Assignments by name to filter the list of Training Assignments
* Click the arrow icon to the left of the Training Assignment to see additional information
* Click the View Staff Members button, number of Staff Members assigned to the Training Assignment or the people icon to open the view of Assigned Staff Members
* Click the button to add additional Staff Members to add more Staff Members to the Training Assignment

**Conclude/Cancel/Reschedule Training Assignments**

* Click the Conclude button to conclude the Training Assignment for all Staff Members
* Click the Cancel button to cancel the Training Assignment for all Staff Members
* Click the Reschedule button to reschedule the Training Assignment for all Staff Members
* Click the tick icon for a Staff Member to conclude the Training Assignment for this Staff Member
* Adjust the Completed Date and whether the Training was completed or not as necessary
* Click the Conclude Assignment button
* Click the cancel icon for a Staff Member to cancel the Training Assignment for this Staff Member
* Click the Cancel Assignment button
* Click the calendar icon for a Staff Member to reschedule the Training Assignment for this Staff Member
* Enter the new Due Date
* Click the Reschedule Assignment button
* This will remove the Staff Member from this group Training Assignment and create a new Training Assignment with the different due date and assign the Staff Member to this Training Assignment.

#### Staff Members

**View/Update Staff Members**

* Filter by Status or Role or search Staff Members by name to filter the list of Staff Members
* Click the arrow icon to the left of the Staff Member to see additional information
* Click the Edit button to edit the Staff Member
* Update the Employment Start Date, Employment End Date and Training Role as necessary
* Click the Save button

**View a Staff Members Training Assignments**

* Click the View Training button or the graduation cap icon to open the Assigned Training for this Staff Member
* Filter by Status or Provider or search Training Assignments by name to filter the list of Training Assignments
* Click the arrow icon to the left of the Training Activity to see additional information

**Conclude/Cancel/Reschedule a Staff Members Training Assignments**

* Click the tick icon for a Staff Member to conclude the Training Assignment for this Staff Member
* Adjust the Completed Date and whether the Training was completed or not as necessary
* Click the Conclude Assignment button
* Click the cancel icon for a Staff Member to cancel the Training Assignment for this Staff Member
* Click the Cancel Assignment button
* Click the calendar icon for a Staff Member to reschedule the Training Assignment for this Staff Member
* Enter the new Due Date
* Click the Reschedule Assignment button
* This will remove the Staff Member from this group Training Assignment and create a new Training Assignment with the different due date and assign the Staff Member to this Training Assignment

**Assign Training to a Staff Member**

* Click the Assign Activity button to assign a new Training Activity for this Staff Member, this opens the Create Training Activity Assignment form on the Select Activity step of the form
* Filter by Provider or search Assignments by name to filter the list of Training Assignments
* Click the arrow icon to the left of an Assignment to see additional information about the Assignment
* Click Select to select an Assignment, this opens the Select Staff Members step of the form
* Filter by Status or Role or search Staff Members by name to filter the list of Staff Members
* Click the Select All button or Select specific Staff Members
* Click Next to move to the Set Date step of the form
* Enter the Due Date, this then opens the Confirm screen in the form
* Click Create to create the Training Assignment

**View a Staff Members Training Activities by status**

* Click a red number to view the Staff Members overdue Training Activities
* Click a blue number to view the Staff Members Training Activities with a future due date

#### Completed Training Activities

* Click the Concluded tab to view the completed Training Activities
* Filter by Status or Role or search Staff Members by name to filter the list of Staff Members
* Filter by Provider or search Assignments by name to filter the list of Training Assignments
* Staff members will be displayed with all activities they have been assigned to
* A staff members activities can either be completed and marked with a tick, or left without the tick when they have been assigned but haven’t completed the activity

#### Training activity Log

* Log in to your reporting entity
* Navigate to the training register
* Click the “Activity Log” button on the right
* All activity is logged here

### Notes

* *All Users for a Reporting Entity will be listed under Staff Members with the Training Role associated with their Role as per the following mappings:*
	+ *Administrator: ADMIN*
	+ *AMLCO: CO*
	+ *AMLSO: CO*
	+ *AML ADMIN: ADMIN*
	+ *Owner: Owner/Management*
	+ *Senior Management: Owner/Management*
	+ *Branch Manager: CO*
	+ *Sales Manager: ADMIN*
	+ *AMLRO: CO*
	+ *ADMIN1: ADMIN*
	+ *Salesperson (Hub Access): Sales*
	+ *Salesperson (App Only): Sales*
	+ *Admin (App Only): Sales*
* *For Training Assignments, the icons/colours have the following meanings:*
	+ *Red: Training Assignment is overdue*
	+ *Blue: Training Assignment due date is in the future*
* *For Staff Members, the icons/colours have the following meanings:*
	+ *Red: the Staff Member has overdue Training Assignment(s)*
	+ *Orange: the Staff Member has not completed any training and has none assigned*
	+ *Blue: the Staff Member has Training Assignment(s) with due dates in the future*
	+ *Grey: The Staff Member has no Training Assignments planned, but has completed training in the past*

### Current Training Work ons:

* Emails are to be sent when training is rescheduled
* Emails are to be sent when training is assigned to someone
* Ability to download .csv reports of completed training