



QUICK START GUIDE

# **Simplify your safety induction and compliance training process**

For contractor administrators



Our online induction software is perfect for businesses with training and induction needs. The system enables your employees and contractors to be trained, compliant, inducted and on the job faster. Have an effective induction and training process with this flexible and fully customisable compliance induction training software. Achieve a superior level of learning courses management and provide different administrator access according to job role or security level.

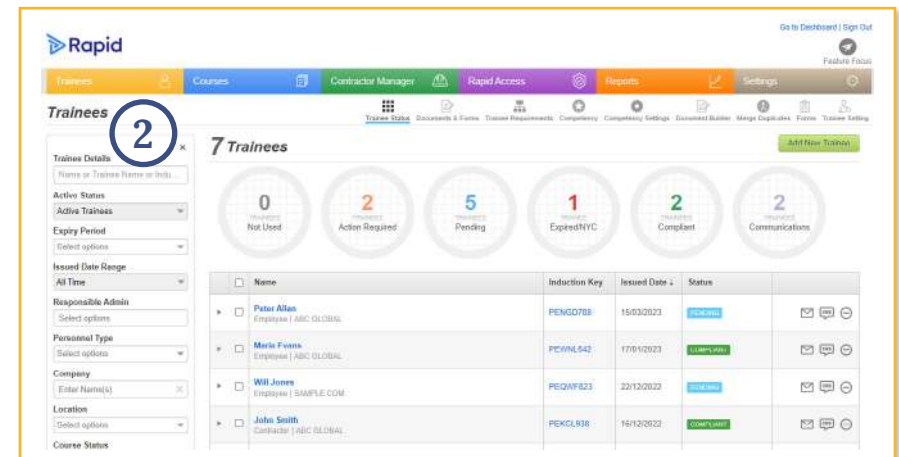
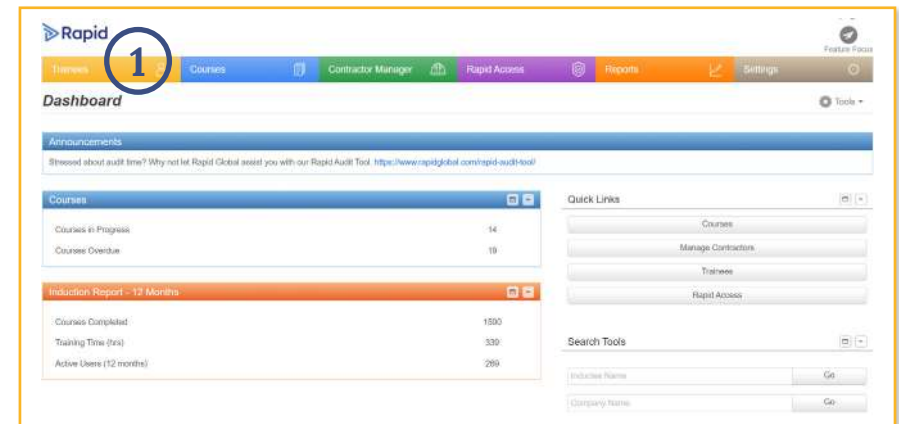
## Contents

Accessing the trainee page	3
Trainee status	4
Trainee search options	5
Trainee course overview	6
Trainee details page	7
Trainee details - course overview	8
Trainee details - assigning course(s)	9
Trainee details - not yet competent	10
Trainee details - documents	11
Trainee details - request a new document	12
Trainee details - verifying / rejecting documents	14
Trainee details - notes	15
Trainee page - re-induct expired trainees	16
Trainee page - re-induct bulk expired trainees	17
Adding a new trainee	18
Deactivate or delete trainees	20
Resend induction key	21

## Accessing the trainee page

From the Admin Dashboard, select the **Yellow Trainee Tab (1)**.

The **Trainee Dashboard (2)** is a summary of your Trainees, their documentation, and compliance.



## Trainee status

The Trainee Tab displays a summary of the Trainee data for each status.

**Click** on a status to review the Trainee records.

**Note Used** Induction keys issued to trainees who have not started their course(s) / activated their MyRapid account.

### Awaiting Approval / Re-Induction

This status expands to show two types of trainees.

#### Awaiting Approval

Number of trainees awaiting approval for:

- Pre-Employment forms.
- Documents.

#### Re-Induction

- Trainees with an upcoming course re-induction.

#### Pending

Trainees with pending tasks (courses, document or forms).

#### Expired/Not Yet Competent

This status expands to show two types of trainees.

#### Expired trainees

- Trainees who have not completed a course within the allocated timeframe.
- Trainees who have expired documents.

#### Not Yet Competent Trainees

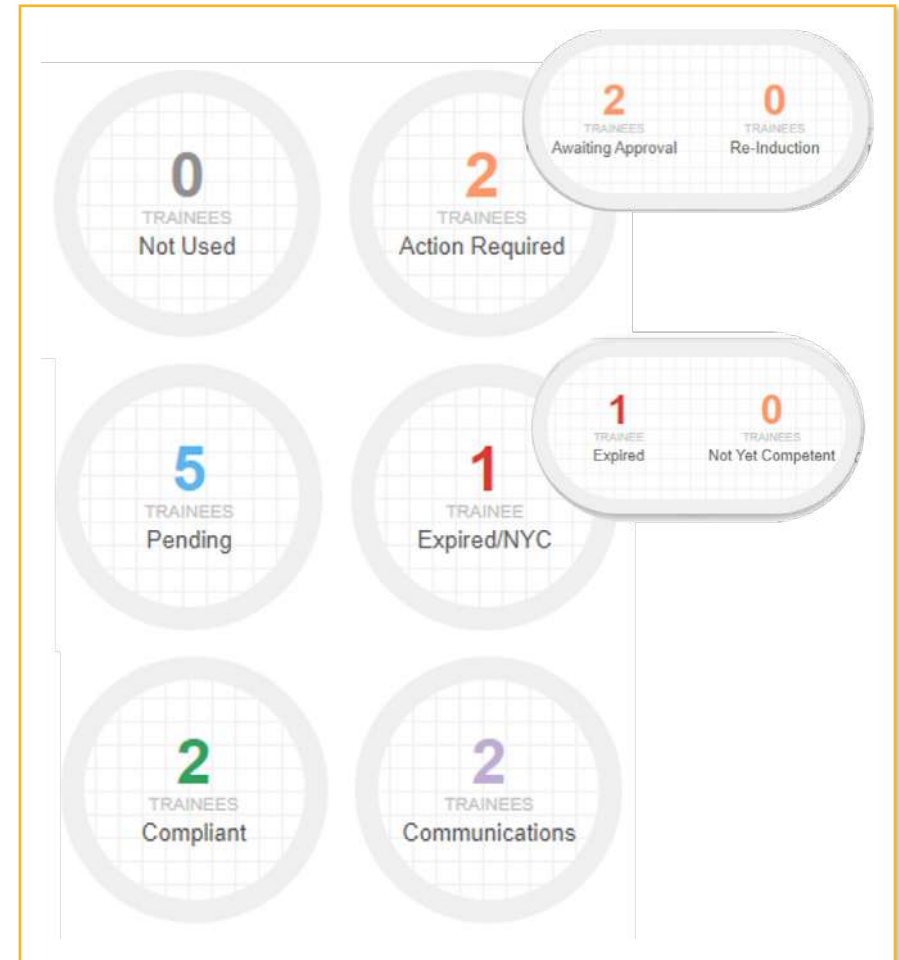
- Trainees who have completed a course(s) and deemed Not Yet Competent.

#### Compliant

Trainees who have successfully completed all tasks (courses, documents or forms).

#### Communications

Displays communication comments between Trainees and Administrators.



## Trainee search options

There are a number of different filters to assist you in searching for a Trainee. These filters are located on the left-hand side of the Trainee screen.

**Search (1)** by Trainee name, induction key, email or general details.

Use the **drop down boxes (2)** to select additional filters required. E.g. Personnel Type, Location.

**Click Search (3).**

Clicking on the Trainee name will open the Trainee details page giving an overview of the Trainees profile and information.

The screenshot shows the 'Trainees' management interface in the Rapid Induct system. On the left-hand side, there is a search bar (1) and a list of filter categories (2) including Active Status, Expiry Period, Issued Date Range, Responsible Admin, Personnel Type, Company, Location, Course Status, Document Status, Form Status, Course, Document, and Form. A 'Search' button (3) is located at the bottom of the filter list. The main area displays a summary of 7 trainees and a table of their details. The summary includes: 0 Trainees Not Used, 2 Trainees Action Required, 5 Trainees Pending, 1 Trainee ExpiredNYC, 2 Trainees Compliant, and 2 Trainees Communications. The table lists the following trainees:

Name	Induction Key	Issued Date	Status
Peter Allan Employee   ABC GLOBAL	PEHQ0788	15/03/2023	PENDING
Nano Evans Employee   ABC GLOBAL	PE09A842	17/01/2023	COMPLIANT
Will Jones Employee   SAMPLE.COM	PEQW825	22/12/2022	PENDING
John Smith Contractor   ABC GLOBAL	PEKCL038	18/12/2022	COMPLIANT
Peter Sample Employee   SAMPLE.COM	PEBFX077	23/11/2022	PENDING
Joanna Briggs Employee   ABC GLOBAL	PEHBU487	23/11/2022	AWAITING APPROVAL
Joe Bloggs Contractor   ABC GLOBAL	PEANM432	25/08/2022	EXPIRED

## Trainee course overview

Once you have found your Trainee, you can view their courses and additional details.

Click on the **Trainee's name (1)** to view or edit the Trainee's details.

Click on the ► icon **(2)** next to the Trainee's name to display their current courses.

Click on the ► icon **(3)** next to the course name to display the course details.

To view more information about the Trainee, click the trainees name to open the **Trainee details page**.

The screenshot displays the 'Trainees' dashboard in the Rapid Induct system. At the top, there are navigation tabs for 'Trainees', 'Courses', 'Contractor Manager', 'Rapid Access', 'Reports', and 'Settings'. Below the navigation, a summary section shows '7 Trainees' with six circular gauges representing different categories: 0 Not Used, 3 Action Required, 5 Pending, 2 Expired/NVC, 2 Compliant, and 2 Communications. A table lists trainees, with 'Peter Allan' highlighted. A dropdown arrow (2) is next to his name, and a circled '1' is over the name itself. Below the table, a course overview for Peter Allan is shown, with a dropdown arrow (3) next to the course name 'Contractor Induction'. The course details table below shows columns for Active From, Active To, Started, Completed, Expiry Date, Re-Induct, and Status.

Name	Induction Key	Issued Date	Status
Peter Allan Employee   FMC GENERAL	FEMGD788	15/03/2023	Expired

Course Name	Expiry Date	Status
Contractor Induction		Expired
Drug and Alcohol Policy Induction	19/03/2024	Compliant
Employee Induction	06/04/2024	Compliant
Working Near-High Induction	06/11/2023	Expired

Active From	Active To	Started	Completed	Expiry Date	Re-Induct	Status
18/04/2023	18/05/2023	06/09/2022	06/05/2022	04/11/2022	6 Months	Expired

## Trainee details page

Clicking on a Trainee's name, the Trainees details page will appear.

The following Trainee details can be **edited (1)**:

- A. Company name.
- B. Trainee Type (primary personnel type).
- C. Secondary Type (secondary personnel type).
- D. Division/Location.

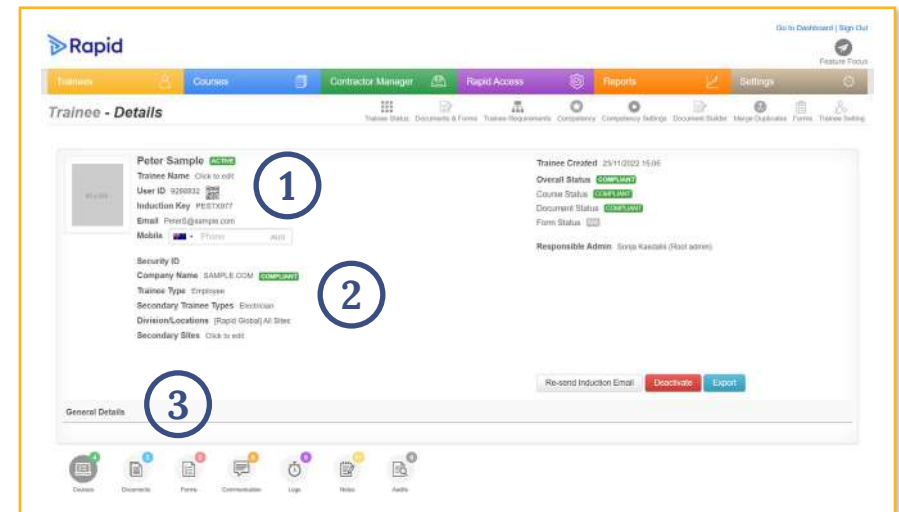
To **edit (2)** Trainee details, click on the field you wish to edit, make changes and click Save.

**You can complete the following actions from this page which are covered on the following pages:**




- Deactivate / Re-activate a Trainee.
- Resend an induction key.
- Assign additional courses.
- Email the Trainee's list of courses, certificates, documents, and forms (where applicable) to an email address as an excel document.

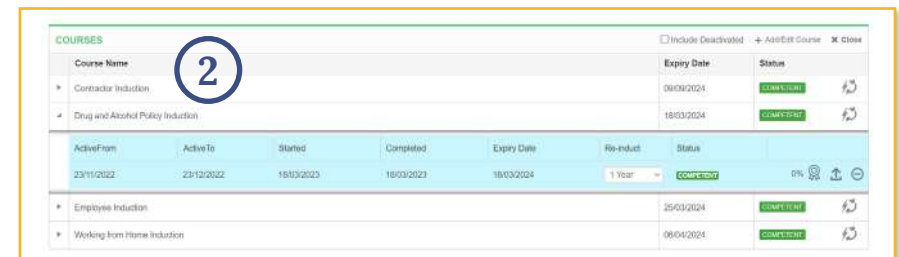
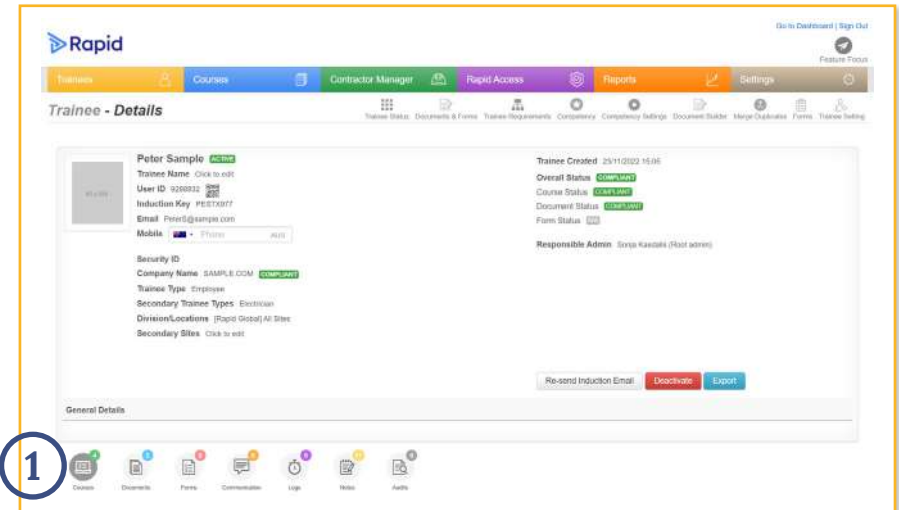
**Additional detail circles (3)** - Click on the circles to view more information about the following:

- A. Courses.
- B. Documents.
- C. Forms.
- D. Notes.



## Trainee details course overview

1. From the Trainee details page, click on the Courses circle to view Trainee's courses.
2. Click the  to expand the course information. This will display due dates and the status of the course.
  - A. Click on the **Certificate icon** to view the Trainee's course certificate.
  - B. Click the **Arrow** to modify/upload a course certificate.
  - C. Click the **Deactivate icon**  to deactivate the course.
  - D. Click the **Re-assign icon**  to re-assign a course.
3. If no certificate is linked to the course (e.g. for external courses) you can upload a certificate manually against the course record.





## Trainee details - assigning a course(s)

1. Click the **Add/Edit course icon**.
2. The **Add/Edit course screen** will be displayed, populated with any pending and expired courses.
3. Click the **dropdown** in the Course Name field to select a course(s). **Click Add**.
4. The course name will be added to the table above this field. The **Priority, From and End Dates** and **Re-induction Fields** are automatically populated as per the course settings.
5. To remove a course, click on the **Trash can icon** next to the course.
6. **Untick send notification** if no email is required to be sent to the Trainee.
7. **Click Update Course List**.

1

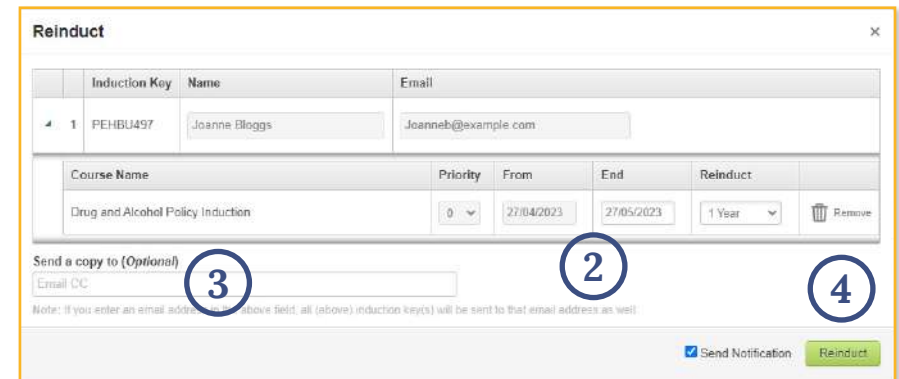
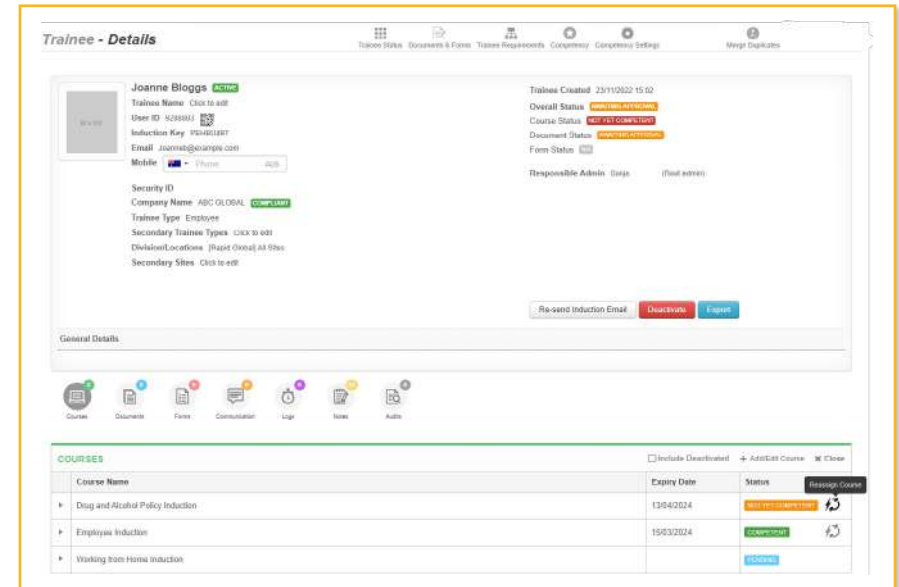
Course Name	Expiry Date	Status
Contractor Induction	09/09/2024	COMPLETED
Drug and Alcohol Policy Induction	18/03/2024	COMPLETED
Employee Induction	25/03/2024	COMPLETED
Working from Home Induction	05/04/2024	COMPLETED

## Trainee details - not yet competent trainee

Not Yet Competent status applies to Trainees who have not met the minimum pass mark of their course.

View the Trainee's details.

1. **Click the Re-assign Course icon.**
2. **The Priority, From and End Dates and Re-induction Fields** are automatically populated as per the course settings.
3. **Select** the email address for CC if required.
4. **Click Re-induct.** An email will be sent to the Trainee and any other persons that were added as a CC.



## Trainee details - Documents

The purpose of the Documents tab is to display all documents uploaded or requested for the Trainee.

Click the Trainees name from the dashboard.

1. Click the **Documents circle** to view any of the Trainee's documents (if applicable).
2. Click on a **document name** to view the document.

All documents for the Trainee are displayed along with the status.

### Pending

Document request has been sent but no document uploaded.

### Delivered

Document has been uploaded and awaiting verification by an administrator.

### Verified

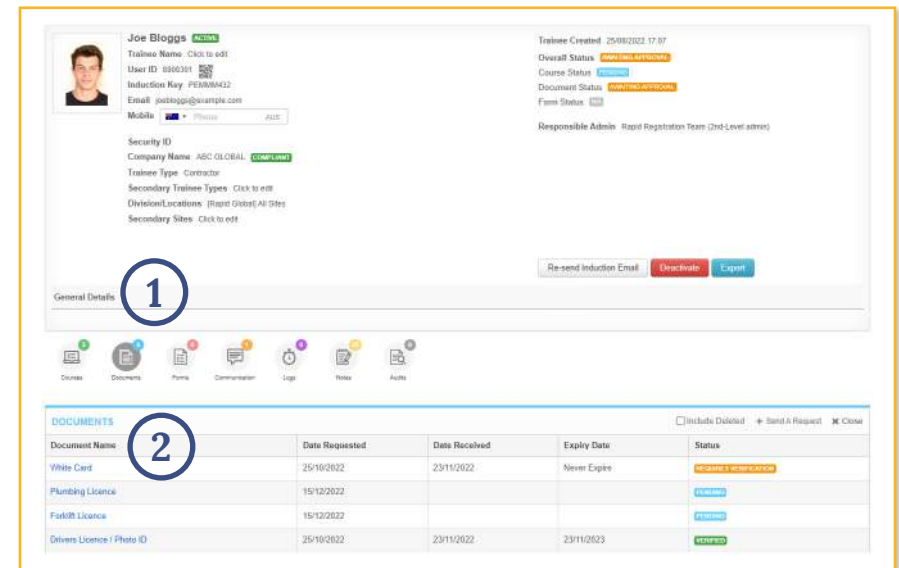
Document has been verified as acceptable by an administrator.

### Rejected

Document has been rejected by an administrator.

### Expired

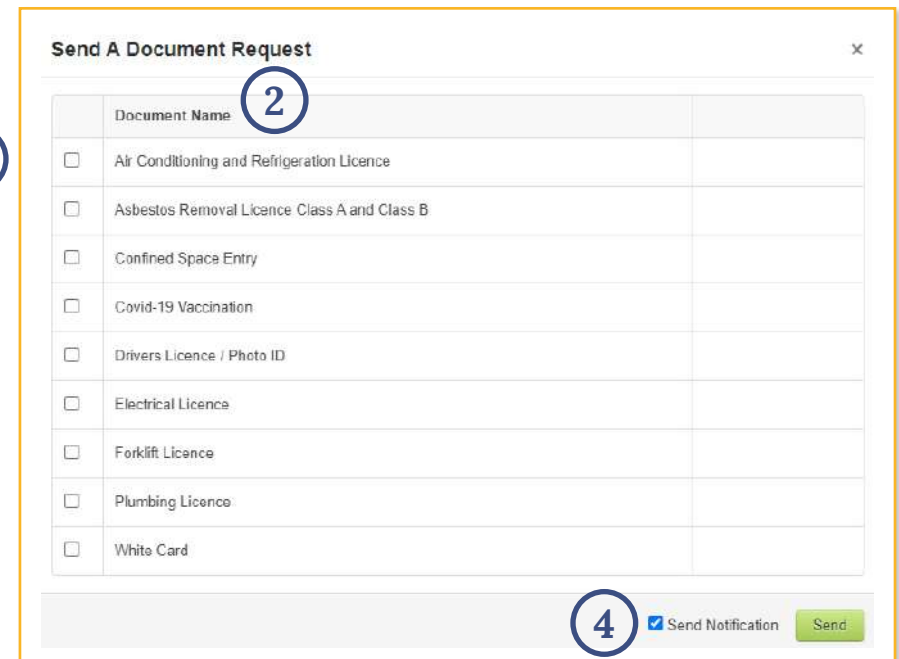
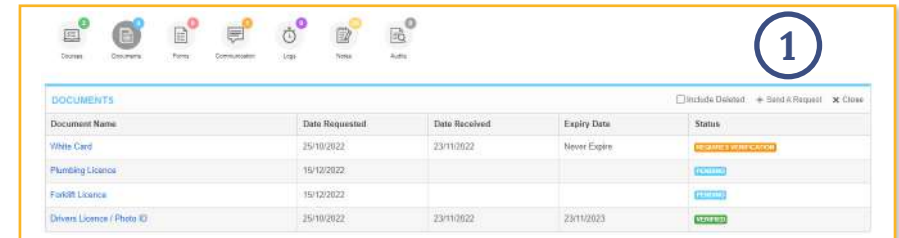
Document date has exceeded the document expiry date.



## Trainee details - request a new document

Documents can be requested via the Trainee Details Page.

1. To request a new document on behalf of a Trainee click **Send a Request**.
2. The **Document** list will be displayed.
3. Select the document(s) you wish to request by **ticking the check boxes**.
4. Select if you would like to notify the Trainee via email, by ticking the **Send Notification**.



## Trainee details - request a new document cont.

5. An **email preview** will appear. Confirm the details are correct and **click send**.
6. The requested document will be displayed as **pending**.

### Send A Document Request

**Subject**  
Request from Rapid Global to upload your documents

**Body**

Paragraph (inherited font) (inherited size)

**B I U** abc [List Bulleted] [List Numbered] [Table] [Link] [Image] [Code]

Dear Joe Bloggs,  
You have been requested by Rapid Global to provide the following documents.

- Confined Space Entry

Your unique induction key is: PEMMM432 (Numbers are underlined.)

Please log on by clicking on the following link.  
<https://my.rapidglobal.com/Web/Account/LogOn/2621>

Should you have any questions regarding this, please contact your Rapid Global - Sonia Kasdalis representative.

**5** Send

Overview Documents Forms Communication Logs Notes Alerts

#### DOCUMENTS

Include Deleted + Send A Request X Close

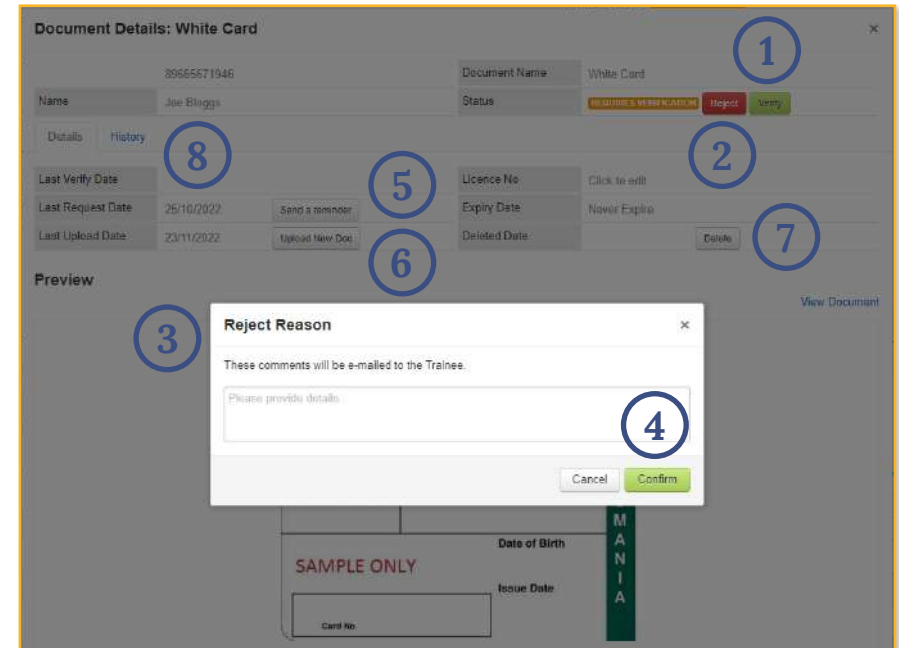
Document Name	Date Requested	Date Received	Expiry Date	Status
White Card	25/10/2022	23/11/2022	Never Expires	COMPLETED
Plumbing Licence	15/12/2022			PENDING
Forklift Licence	15/12/2022			PENDING
Drivers Licence / Photo ID	25/10/2022	23/11/2022	23/11/2023	COMPLETED
Confined Space Entry	27/04/2023			PENDING

**6**

## Trainee details - verifying / rejecting documents

When clicking on the document name, details of the document are displayed. Documents can be Verified or Rejected.

1. If the document meets the requirements, **click Verify**.
2. If the document doesn't meet the requirements, **click Reject**. A **Reject Reason** box will be displayed.
3. Enter the reject reason and click **Confirm**.
4. An email will be sent to the Trainee with the **reason** included.
5. To send a document reminder email click **Send a Reminder**.
6. To upload a document on behalf of a Trainee click **Upload New Doc**.
7. To delete a document request click **Delete**.
8. **History** shows details of when documents were uploaded or verified and allows previous documents to be viewed.



## Trainee details - notes

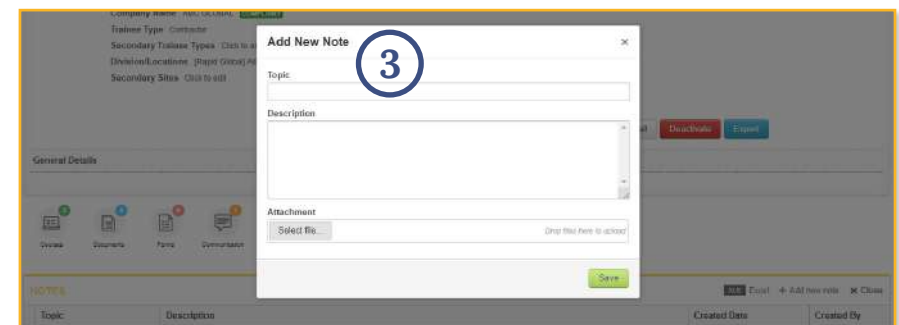
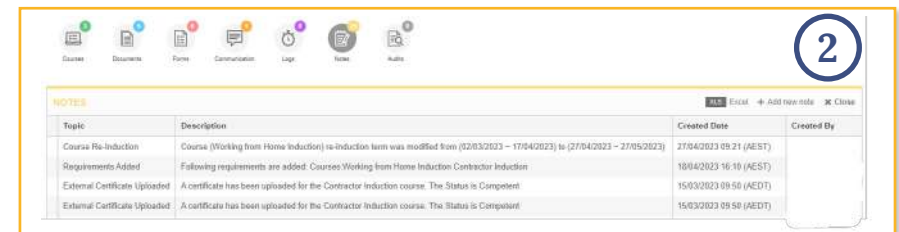
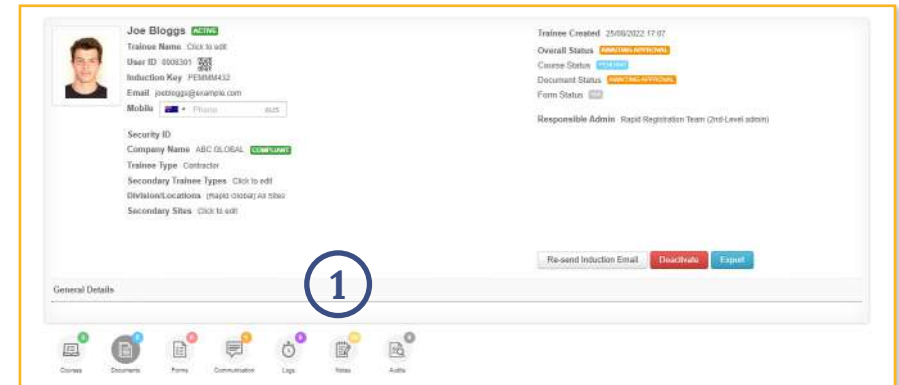
The Notes Circle provides details of actions completed on the Trainee's profile including:

- When Induction Keys are sent/resent to Trainees.
- Deactivation of Trainees.
- Pre-employment trail e.g. approval details (for systems that have this feature).
- Export details of the Trainee records that have been emailed to others.

From the Trainees Details Page:


1. Click the **Notes Circle**. Details will be displayed.
2. To add a new note, click **Add New Note**.
3. Enter the **Topic**, **Description** and **optional attachment**. Click save.

**Note:** The Notes cannot be edited once created.



## Trainee page – re-induct expired trainees

The Expired status on the Dashboard filter shows Trainees with an expired course, document or form.

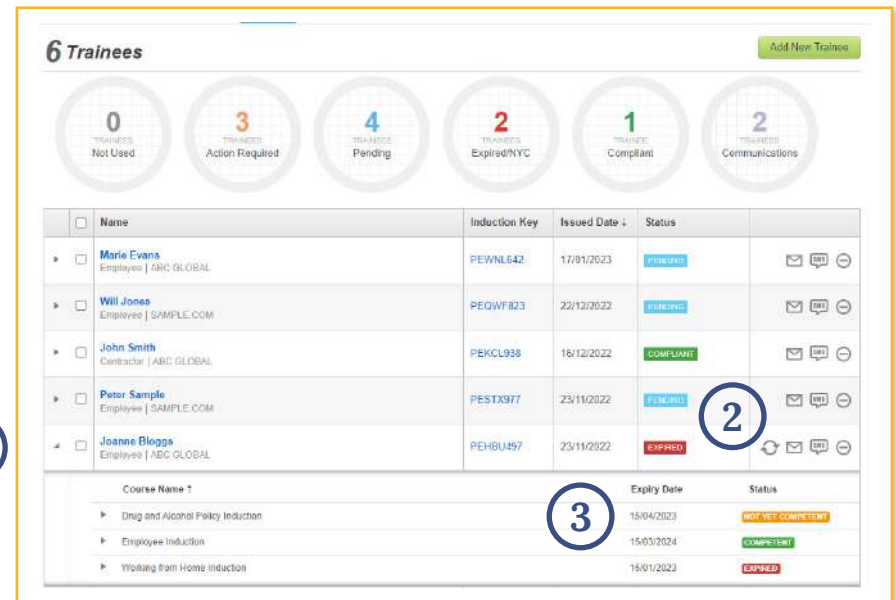
1. To Re-induct a Trainee for a course, click the ► icon to expand the Trainee’s details.
2. **Click** the Re-induct icon 

The list of all courses **due** for re-induction will be displayed.
3. **The Priority, From and End Dates** and **Re-induction Fields** are automatically populated as per the course settings.
4. **Add** an email address for CC if required.
5. Click **Re-induct**. An email will be sent to the Trainee with their Induction Key and course details.

### Not Yet Competent (NYC)

















The Not Yet Competent status on the dashboard shows trainees that have not achieved the minimum pass mark for an induction.

Re-inducting the Trainee will make the course active for a second attempt.

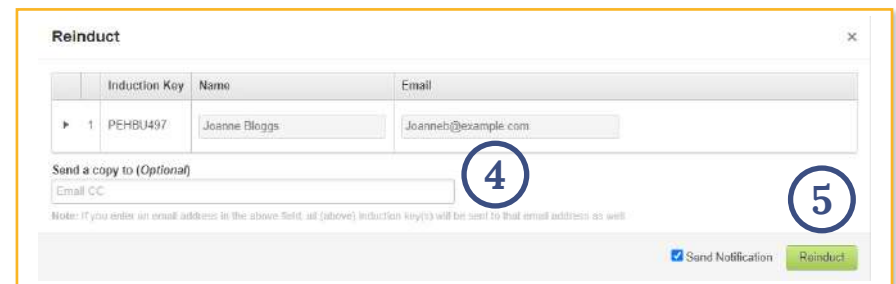


**6 Trainees** Add New Trainee

0 Trainees Not Used | 3 Trainees Action Required | 4 Trainees Pending | 2 Trainees Expired/NYC | 1 Trainee Compliant | 2 Trainees Communications

<input type="checkbox"/>	Name	Induction Key	Issued Date ↓	Status	
<input type="checkbox"/>	Marie Evans Employee   ABC GLOBAL	PEWN642	17/01/2023	COMPLIANT	  
<input type="checkbox"/>	Will Jones Employee   SAMPLE.COM	PEQWF823	22/12/2022	PENDING	  
<input type="checkbox"/>	John Smith Contractor   ABC GLOBAL	PEKCL938	18/12/2022	COMPLIANT	  
<input type="checkbox"/>	Peter Sample Employee   SAMPLE.COM	PESTX977	23/11/2022	PENDING	  
<input checked="" type="checkbox"/>	Joanne Bloggs Employee   ABC GLOBAL	PEHBU497	23/11/2022	EXPIRED	   

Course Name *	Expiry Date	Status
Drug and Alcohol Policy Induction	15/04/2023	NOT YET COMPETENT
Employee Induction	15/03/2024	COMPLIANT
Working from Home Induction	15/01/2023	EXPIRED



**Reinduct** ×

	Induction Key	Name	Email
▶ 1	PEHBU497	Joanne Bloggs	Joanneb@example.com

Send a copy to (Optional)

Email CC



Note: If you enter an email address in the above field, all (above) induction key(s) will be sent to that email address as well.

Send Notification

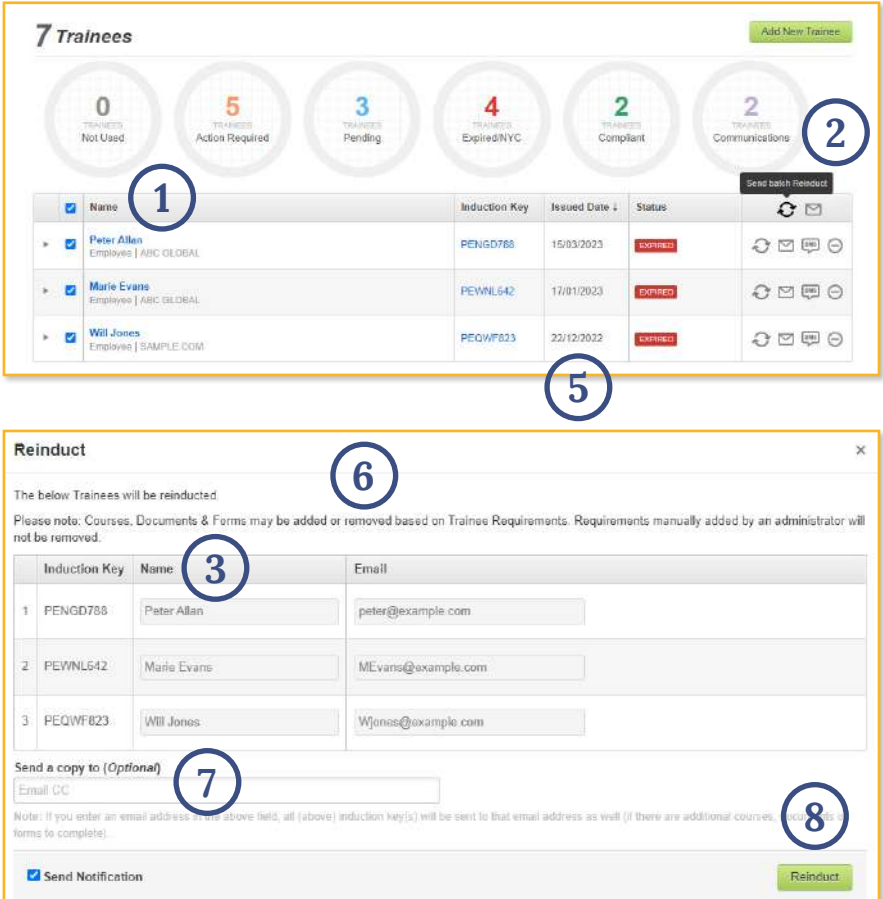


## Trainee page – re-induct bulk expired trainees

**Multiple** Trainees can be re-inducted at once. The Expired/NYC (Not Yet Competent) status on the Dashboard filter shows Trainees that have course(s) ready for Re-induction or have an expired Induction key.

1. **Tick** the box next to the Name field to select all Trainees on the page.
2. Click the **bulk re-induct icon** . This will re-induct all Trainees that require re-induction.  
**Please note:** This step must be repeated if there is more than one page listed.
3. **Trainee names** and **email addresses** are displayed.
4. **Click**  icon to view course details.
5. The **Priority, From and End Dates and Re-induction Fields** are automatically populated as per the course settings.
6. To remove a course, click on the **Trash can icon** next to the course.
7. Add **CC Email** if required.
8. Click **Re-induct**.

An email will be sent to the Trainee with their Induction Key and course details.



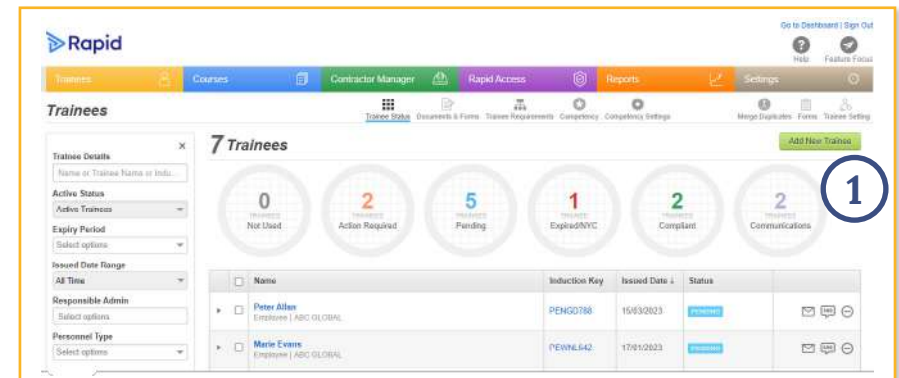
The screenshot shows the '7 Trainees' dashboard and the 'Reinduct' dialog box. The dashboard includes a summary of trainee counts: 0 Not Used, 5 Action Required, 3 Pending, 4 Expired/NYC, 2 Compliant, and 2 Communications. A table lists three trainees: Peter Allan, Marie Evans, and Will Jones, all with 'EXPIRED' status. The 'Reinduct' dialog box shows a table of the selected trainees with their induction keys, names, and email addresses. It also includes an optional 'Email CC' field and a 'Send Notification' checkbox.

Name	Induction Key	Issued Date	Status
Peter Allan Employee   ABC GLOBAL	PENGD788	15/03/2023	EXPIRED
Marie Evans Employee   ABC GLOBAL	PEWNL642	17/01/2023	EXPIRED
Will Jones Employee   SAMPLE.COM	PEQWF823	22/12/2022	EXPIRED

Induction Key	Name	Email
1 PENGD788	Peter Allan	peter@example.com
2 PEWNL642	Marie Evans	MEvans@example.com
3 PEQWF823	Will Jones	Wjones@example.com

## Adding a new trainee

1. Click **Add New Trainee** via the Trainee page.
2. Select **Trainee Group** (Personnel Type).
3. Select **Company Name** or Add New Company if not listed (will default for Employee personnel types).
4. Select the relevant **Division** and **site**.
5. **Mandatory courses** for the Trainee Group will be pre-populated if set up in the training matrix. The Priority, From and End Dates and Re-induction Fields are automatically populated as per the course settings.
6. **Add** additional courses if required by selecting from the dropdown.
7. **Select** the number of Induction Keys required.
8. **Mandatory documents** will appear if required for the Trainee to upload.
9. **Click** Create Trainees.



## Adding a new trainee cont.

1. Add **Trainee name** and **email address**.
2. Add a **CC email** if required.
3. Click **Send**.

If more than one trainee is being created, Click Send All Induction Keys to send a batch of emails to the CC email address only.

4. Induction Email Preview will appear. **Click send**.

### Send Induction Key

Induction Key	Name	Email
1 PECSU768	Sean Forest	Sforest@example.com

Send a copy to (Optional)

Email CC

Note: If you enter an email address in the above field, all (above) induction key(s) will be sent to that email address as well.

Send

### Induction Email Preview

Subject: Request from Rapid Global to complete your online induction

Body

Paragraph

(inherited font) (inherited size) A

**B I U**

Dear Sean Forest,

You have been requested by Rapid Global to complete the course listed below.

To complete the course(s), please use the link below to log in or to create your MyRapid account: **test**

<https://my.rapidglobal.com/Web/Account/LogOn/2621>

Your Induction Key is: **PECSU768**.

We allow you to personalize the text. By adding {{INDUCTEE\_NAME}}, {{INDUCTION\_KEY}}, {{COMPANY\_NAME}} and {{MY\_RAPID\_LINK}} to above text, we will dynamically change this value with real info.

Delay email by 0 hours

Send

## Deactivate or delete trainees

**Deactivating Trainees** retains all the Trainee's training details. A deactivated Trainee can be reactivated if required.

**Deleting Trainees** can be actioned if the induction key has never been activated and no courses have commenced.

**Please note:** You cannot delete a Trainee that has commenced a course in the system.

From the Trainee Page you can deactivate or delete Trainees.

### Deactivation

Click **Deactivate icon (1)** to Deactivate an active Trainee e.g., left the company or is on long term leave.

### Deletion

Click **Trash Can icon (2)** to Delete an unused induction key. This can be done when a Trainee has never logged in.

The screenshot displays the '6 Trainees' management page. At the top, there are six circular gauges representing different trainee statuses: 0 Not Used, 4 Action Required, 2 Pending, 3 Expired/NYC, 2 Compliant, and 2 Communications. Below the gauges is a table with columns for Name, Induction Key, Issued Date, and Status. The table lists five trainees with their respective details and action icons (deactivate, delete, etc.).

<input type="checkbox"/>	Name	Induction Key	Issued Date	Status	
<input type="checkbox"/>	Peter Allan Employee   ABC GLOBAL	PEN00786	15/03/2023	NOT USED	✉️ 🗑️
<input type="checkbox"/>	Marie Evans Employee   ABC GLOBAL	PEWNLS42	17/01/2023	COMPLIANT	✉️ 🗑️
<input type="checkbox"/>	Will Jones Employee   SAMPLE.COM	PEQWF823	22/12/2022	PENDING	✉️ 🗑️
<input type="checkbox"/>	John Smith Contractor   ABC GLOBAL	PEKCL938	16/12/2022	COMPLIANT	✉️ 🗑️
<input type="checkbox"/>	Peter Sample Employee   SAMPLE.COM	PESTX977	23/11/2022	EXPIRED	✉️ 🗑️

2  
1

## Resend an induction key

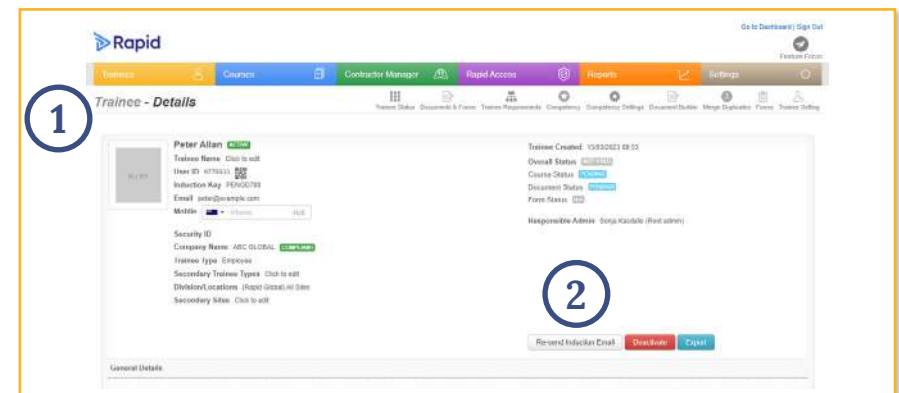
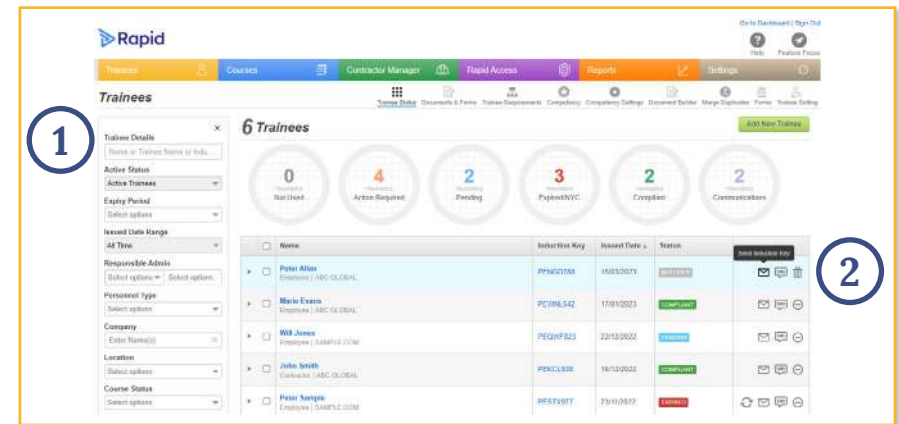
The Induction email can be resent to the Trainee at any time.

From the **Trainee Tab**.

1. **Search** for the Trainee in a Trainee Details field.
2. Click the **Envelope icon** on the right-hand side.
3. The **Send Induction Key** window is displayed.
4. Change the name and email address if required.
5. **Add** a CC email address if required.
6. Click **Send**.

From the **Trainee Details** Page.

1. **Open** the Trainee Details Page of the Inductee.
2. **Click** the Re-send Induction Email.
3. Follow the above **steps 3-6**.



## Learn more

Rapid's team is here to support you.

### Helpful resources

Dive into our library of tutorials and support content to help you and your team get the most out of Rapid's feature rich software.

### Live support

Rapid's Client Services team is ready to help you with your technical questions and can be reached by phone or email (1800 307 595, [support@rapidglobal.com](mailto:support@rapidglobal.com)).

### On-going consultation

Take your workplace safety to the next level and speak to our experts about Rapid's other workplace management products.

### Connect with us

Keep up to date on our latest product features and follow @RapidGlobal on Linked In, Facebook or Twitter.

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