

Common Tasks

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Videos

Common Tasks

Step-by-step instructions for the tasks you do most often.

Book a delegate onto a course

Booking form → select course → select date → enter delegate details → pay by card or PO → confirm.

Mark a session as complete and issue certificates

Admin → Sessions → find session → click Manage → tick attended delegates → click Send Review Emails.

Certificates issue automatically after feedback.

Download a certificate

Admin → Sessions → session → delegate row → Download Certificate. Or via Delegate Portal → Certificates.

Add a new compliance type

Admin → Comp. Types → + Add Type → fill in name, category, validity months and reminder schedule → Save.

Record an external certificate manually

Admin → Compliance → All Compliance Records → + Add Record → select organisation, employee, compliance type, dates and provider.

Import bulk compliance records from CSV

Admin → Compliance → ↑ Import Certs → upload CSV file (email, first_name, last_name, compliance_type_name, issued_date, expiry_date, certificate_number, provider_name) → preview → confirm import.

Set up competency requirements for a job role

Admin → Compliance → Competency Requirements → + Add Requirement → select organisation, job role and compliance type → mark mandatory → Save.

Run a gap analysis for an employee

Admin → Workforce → find employee card → click Gap Analysis button. The system shows every required compliance type they are missing or have lapsed.

Add an asset to the register

Admin → Assets → + Add Asset → fill in name, category, organisation, serial number, location, next inspection date and calibration due date → Save.

Log a near miss or risk assessment

Admin → Risk & Audit → + Add Item → select type (Near Miss, Risk Assessment etc.) → fill in title, description, risk level, owner and due date → Save. A reference number is generated automatically.

Send a portal invitation to a company booker

Admin → Users → Send Portal Invite → enter their email address and organisation name → Send. They receive a set-password email and can access the Organisation Hub immediately.

Link a trainer to their portal account

Admin → Trainers → find trainer → Edit → scroll to Portal Login Account → enter their email → Link Account → save.

Void and reissue a certificate

Admin → Certificates → find certificate → Void (enter reason) → Reissue (enter reason). A new certificate with a new number is linked to the original for audit trail.

Export compliance records to CSV

Admin → Compliance → All Compliance Records → ↓ Export. The CSV includes organisation, employee, compliance type, category, status, dates, certificate number and provider.

Refresh the Management Intelligence dashboard

Click the ↻ Refresh button at the top of `admin-intelligence.html`. To force a full cache refresh, run the four compute functions in the Supabase SQL Editor.