

How do I create a new certificate?

1. Click on **New**.
2. Select the **Certificate type**.

The screenshot shows a web application window titled "Certificate details" with a blue header bar. Below the header is a tabbed interface with three tabs: "General" (selected), "Documents", and "Forms". The "General" tab contains the following fields:

- Certificate type:** A section with three radio button options: "Annual" (selected), "Intermediate", and "None". Each option has associated dropdown menus for frequency (e.g., "Months") and numerical values for "before", "after", and "before renewal".
- Certificate number:** A text input field.
- Category:** A dropdown menu currently showing "Safety equipment".
- Certificate name:** A text input field.
- Issued by:** A dropdown menu.
- Renewal after:** A dropdown menu showing "Years" and a numerical input field.
- Date of issue:** A text input field showing "day/month/year" with a calendar icon.
- Storage:** A large text area.
- Comments:** A large text area.

At the bottom of the form are three buttons: "Save", "Save & close", and "Close".

- **Annual:** A survey will be planned annually for this certificate.
 - **Intermediate:** A survey will be planned for some time between the date of issue and the date of expiry.
 - **None:** Use this type when no intermediate surveys are required.
3. Complete all required fields.
 4. Click on **Save & close**.

If a certificate is entered with an issue date but without an expiry date, enter a 0 in **Renewal after**. This will remove the expiry date from the screen.

Revision #2

Created 8 November 2024 15:25:50 by Peter van Driel

Updated 8 November 2024 15:27:39 by Peter van Driel