Meeting Minutes

Meeting Title: Initial Client Meeting – Health, Safety & Wellbeing Training Tracker

Date: 29 July 2025

Time: 12:30 pm

Location: 55 Broadway, Nedlands WA 6009

Minutes Prepared By: Siqi Shen

Attendees:

- **Client:** Jay Peiris
- **Team Members:** Zhaodong Shen, Dani Thomas, Gayathri Kasunthika Kanakaratne, Christina Fington, Siqi Shen

1. Project Scope Clarification

- The system will function primarily as a **data analytics and reporting tool**, **not a training delivery platform**.
- It aims to assist UWA in tracking health and safety training compliance across staff and students.

2. Core Functional Requirements

- The system will store user information (ID, name, email).
- Admins will upload training records (e.g., LMS, TryBooking) via **Excel spreadsheets**.
- The system will **match training records to users** and display completion status and expiry where applicable.
- If feasible, **API integration** with platforms like LMS or TryBooking is preferred to reduce manual upload effort.

3. Data Upload & Structure

- Sample data templates were requested and have been provided by the client.
- For now, uploads will be manual (Excel format); future automation via API is desirable.
- Admins will gather training data and upload in predefined structure.
- The system does not need to distinguish training delivery method (e.g., LMS or F2F) at this stage.

4. External Training Support

- Users will be able to upload **evidence or certificates** for trainings completed externally.
- Admins will maintain a list of recognized training options for users to select from when uploading evidence.

5. Administrative Features

- Admins can:
  - Maintain/edit the training list
  - Upload bulk data
  - Search for users and view their training records
- Users:
  - Can view their own records
  - Upload evidence for relevant trainings

6. Reporting Features

- The system should support:
  - Training completion summaries
  - Attendance statistics
  - Feedback summaries
  - Upcoming training expiries
  - Export reports in PDF/Excel
  - Integration with Power BI for deeper analytics (in future)

7. Pending Client Questions

Jay raised two important queries requiring follow-up:

1. What platform will the team use to build the system? (e.g., Power BI, Web App, etc.)
2. How will access to the Tracker be managed securely?

8. Next Steps

- Team to confirm technical platform and access control plan.
- Team to begin working on D1 documentation (project plan and requirements).
- Jay will provide workflows and data templates for additional training sources later.