



Navigate to Registers/Training etc/Training and click **+ADD NEW** or double click any line to edit. Use the filters and search bar to find specific records.

Items will show in orange if they are due in the next two weeks, or they have no Document stored against them. Red Items have overdue refresher dates.

Date	Type	Training Course / Subject	Name of Trainee	Supplier	Instru...	RefresherDue...	Status	Doc...	SELECT ALL
12/07/2023	General	Spill Kit	Sam Hunt	Fish Training Ltd			Current	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/05/2023	General	Confined Space Entry	Mary Poppins	Fish Training Ltd	Big Fish		Current	<input type="checkbox"/>	<input type="checkbox"/>
30/06/2021	First Aid	AED Training	Kermit Frog	A1 Training Ltd		30/06/2023	Current	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21/02/2021	Fire	Fire and Rescue First	Lea AStarwars	Fish Training Ltd		28/08/2023	Current	<input checked="" type="checkbox"/>	<input type="checkbox"/>

A. Creating New Record

1. Select the date the training will be or has been conducted on from the date picker.
2. Select the Type of training.
3. Select the Training Course / Subject or click + to add a new one.
4. Select the Name of Trainee from staff list.
5. Select the Training Provider or click + to add a new one.
6. Type in the Instructors name if required.
7. If a refresher course needs to be completed in the future select a date for this – this is optional.
8. The Status will default to Current.
9. Click **+ADD FILE** to load a [document](#) or it can be loaded from the mobile app.
10. Click **SAVE**.

Home / Registers / Training etc / Training 10 **SAVE** **DELETE** **BACK**

1 Date: 30/06/2023 2 Type: First Aid 3 Training Course / Subject: AED Training

4 Name of Trainee: Penolpe Pink 5 Training Provided by (Third Party): Fish Training Ltd 6 Instructor: Mary Blunt

7 RefresherDueDate: 4/08/2026 8 Status: Current 9 **ADD FILE**

Documents	Last Modified Time	Version No.	Title	Description	Action
	09/07/2023 11:31	2	training cert.jpg	Penolpe Pink - First Aid AED	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

B. Create a Copy

After clicking save you can re-open the entry and click **COPY**. This will generate a new record with the same details except:

- Name of Trainee
- Refresher Due Date
- Documents will be cleared



C. Upload New Certificate & View History

1. When a refresher has been completed for an existing training record:
 - change the Date & Refresher Due Date.
 - Use the upload button to add a new certificate.
 - When you **SAVE** click **OK** to the version update message.

Confirm ✕

Version 2 will be replaced with version 3, do you want to proceed?

1 **OK** **CANCEL**

2. To see the document history click **VIEW HISTORY**.
3. Previous versions will be displayed.

Documents **2** [VIEW HISTORY](#) [ADD FILE](#)

Last Modified Time	Version No.	Title	Description
09/07/2023 11:31	2	training cert.jpg	Penolpe Pink - First Aid AED

Document Title	Document Description	Version	Modified Time
training cert.jpg	Penolpe Pink - First Aid AED	2	09/07/2023 14:01

Title	Version No.	ModifiedBy	Date Modified or Reviewed	Description
train first aid.jpg	1	Heidi Thonig	09/07/2023 13:57	Penolpe Pink - First Aid AED
training cert.jpg	2	Heidi Thonig	09/07/2023 14:01	Penolpe Pink - First Aid AED

1 - 2 of 2 items

D. Emailing Documents

From the Grid view you can use the filters or search buttons to show specific records:

1. Click **SELECT ALL** or tick the boxes needed.
2. Click **EMAIL**.
3. Select any required Staff Contacts.
4. Select a Customer if required.

5. Then selected from this customers contacts.
6. Change the subject as required.
7. Click **SEND**.

Those selected will receive an email with the documents attached with a list of what is included.

[Home](#) / [Registers](#) / [Training etc](#) / [Training](#)

[EXCEL](#) [PDF](#) [FILTER](#) [GROUP](#) Archived **2** [EMAIL](#)

Date	Type	Training Course / Subject	Name of ...	Refresh...	Status	Doc..	1 SELECT ALL	<input type="checkbox"/>	<input type="checkbox"/>
30/06/2021	First Aid	AED Training	Kermit Frog	30/06/2023	Current	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13/07/2023	First Aid	First Aid - Electrical Refresher	Mobile Craig	31/07/2025	Current	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30/06/2023	First Aid	AED Training	Penolpe Pink	04/08/2026	Current	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Send Email ✕

3 Staff Contacts

4 Customer

5 Customer Contacts

6 Subject

7 [SEND](#) [CANCEL](#)

Training Document Details

noreply@safetyminder.co
 To: Heidi Thonig

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Kermit Frog-First Aid-AED Training.png 16 KB Penolpe Pink-First Aid-AED Training.png 35 KB
 Mobile Craig-First Aid-First Aid - Electrical Refresher.jpg 36 KB

Training Documents Attached:

Type	TrainingCourse	Staff	RefresherDueDate
First Aid	AED Training	Penolpe Pink	04/08/2026
First Aid	AED Training	Kermit Frog	30/06/2023
First Aid	First Aid - Electrical Refresher	Mobile Craig	31/07/2025

Entries can be viewed and emailed from the mobile app in [Profile/Training](#)

NOTES:

- For items no longer required, change the status to "Archived".

