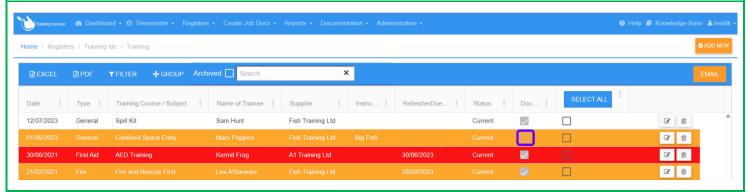
Training Register

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.



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.



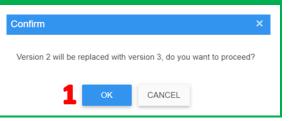
B. Create a Copy

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.

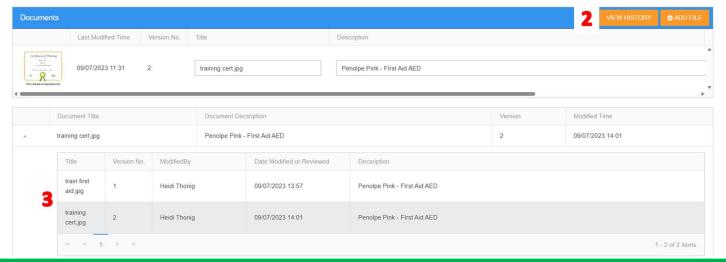


☆ DELETE

♠ COPY

S BACK

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



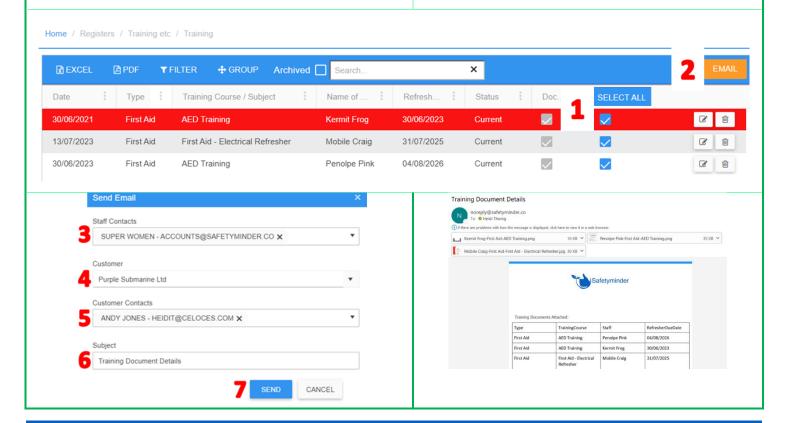
D. Emailing Documents

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

- 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.



Entries can be viewed and emailed from the mobile app in Profile/Training

NOTES:

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



Safetyminder Knowledge Base - Copyright of Trans-Tasman Pty Ltd

Oct-23