

Training

the setup that makes the module tell the truth

The decisions an administrator makes once: what each job title is required to hold, how job titles are shared between sites, which talk comes round next, who gets the expiry reminders, and what employees and contractors can see.

ADMIN GUIDE – FOR ADMINISTRATORS

VERSION 1.0

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Setting up ShieldSphere Training means deciding what training each job title must hold, how far those job titles reach across your sites, which toolbox talk comes round next, and who is told when training is about to expire. Those settings are what turn the module from a filing cabinet into something that tells you who is short before an auditor does.

1 What an administrator sets up

The day-to-day work - running sessions, adding records, delivering talks - is covered in the **Training User Guide** and the **Training Sessions User Guide**. This guide is the handful of decisions that shape what those pages report.

There are five, and only the first is genuinely required:

DECISION	WHY IT MATTERS
The requirements matrix	Nothing counts as a gap until you have said it is required. This is the one that makes the module useful.
Job title scope	Whether a job title and its requirements apply across a client's sites or at one location only.
Talk rotation	What ShieldSphere suggests next, and on which day of the week.
Reminder preferences	Whether expiry emails go out, and to whom.
Portal visibility	Whether employees and contractors can see their own training.

2 Who can see Training

Training sits in the **Daily Work** group of the workspace sidebar. Whether it is available depends on your plan, and the module was built with one deliberate exception to that:

RECORDING TRAINING YOU DELIVERED IS NEVER BEHIND A PAYWALL

Logging that you trained your own people is a compliance obligation, so the act of recording it is not gated. What varies by plan is the surrounding tooling: the full 120-talk library, QR sign-in for sessions, and PDF export. A sampler of ten library talks stays open on every plan, and AI talk generation is limited on the free plans.

Field users - people using the mobile app rather than the full dashboard - can read the tracker and create a session, so a foreman can run a tailgate talk without needing an administrator to set it up first.

3 The requirements matrix is the policy

This is the setup task that matters most, and the one most likely to be skipped. Until a training is *required* of a job title, nobody can be short of it - so an empty matrix reports that everyone is current, forever, no matter what the records say.

TSG Safety

Organization Overview
CURRENT PROFILE
Demo Company

Site Overview

AI TOOLS
Hazard Scanner
Job Hazard Analysis
Ergonomic Evaluation
ZeroState

DAILY WORK
Compliance
Training
Policies
Inspect
Incidents / OSHA 300
Assets
SDS
Risk Assessments
Resources

CONTRACTORS
Contractors
Projects
Site Board
Permits

INSIGHTS
Trends
Employees
Profile Settings

ACCOUNT
Team
Account Settings
Admin

Log out

Training

Records, sessions, and toolbox talks for Demo Company

Overview
3 expired 3 expiring soon
12 records tracked

Records
3 expired 3 expiring soon
6 current · 0 no expiry

Sessions
1 unmatched 1 open
1 held this week

Toolbox Talks
On track
3 talks

Training Matrix
33 missing 1 due
Topic by job title matrix

Training matrix
Tick the training each job title needs. 9 topics · 5 job titles

+ +

Training	Forklift Operator	Machine Operator	Maintenance Technician	QC Inspector	Safety Coordinator
Fall protection Annual This location	☐	☐	☒	☐	☐
First aid / CPR / AED Every 2 years This location	☐	☐	☐	☐	☒
Forklift / powered industrial truck Every 3 years This location	☒	☐	☐	☐	☐
Hazard Communication (HazCom) Annual This location	☒	☒	☒	☒	☒
Lockout/Tagout Annual This location	☐	☒	☒	☐	☐
Machine guarding Annual This location	☐	☒	☒	☐	☐
New hire safety orientation No expiry This location	☒	☒	☒	☒	☒
Personal protective equipment Annual This location	☒	☒	☒	☒	☐
Respiratory protection Annual This location	☐	☒	☒	☐	☐

Who is due
33 never trained · 2 expired · 1 due in 30 days

Employee	Job title	Required training
Derek Calloway EMP-003	Maintenance Technician	Hazard Communication (HazCom) · Never trained Lockout/Tagout · Never trained Machine guarding · Never trained New hire safety orientation · Never trained Personal protective equipment · Never trained Respiratory protection · Expired Fall protection · Current
James Harrington EMP-001	Machine Operator	Lockout/Tagout · Never trained New hire safety orientation · Never trained Personal protective equipment · Never trained Respiratory protection · Never trained Hazard Communication (HazCom) · Due in 30 days Machine guarding · Current
Marcus Bell EMP-007	Maintenance Technician	Fall protection · Never trained Hazard Communication (HazCom) · Never trained Lockout/Tagout · Never trained Machine guarding · Never trained New hire safety orientation · Never trained Personal protective equipment · Never trained Respiratory protection · Never trained

The matrix, and what falls out of it. Each tick is a rule. The gap report underneath is measured entirely against those ticks - which is why an empty matrix always reports everyone current.

1 Take the suggestions from your own policies

ShieldSphere reads the policies you hold at that location and suggests training topics from them. Start here: a matrix built from your own written policies is one you can defend, because the requirement and the document that imposes it agree by construction.

2 Set a renewal interval on anything that lapses

A requirement with a renewal interval expires the way the training does, so a person who was trained three years ago on a two-year certification shows as a gap rather than as covered. A requirement with no interval is satisfied once and stays satisfied.

3

Add a note where the rule needs explaining

Requirements carry an optional note. Use it for the reason - the standard, the client contract, the insurer's condition. The person reading the gap report a year from now is often not the person who set the rule.

NAME TOPICS THE WAY YOUR RECORDS NAME THEM

A requirement is satisfied by a matching training record. If your records say "Forklift" and the requirement says "Powered industrial truck", every operator reads as a gap. Agree the wording once, at the point you build the matrix.

4 Job titles across sites

A job title added to the matrix is **shared across all of a client's sites by default**. That is deliberate: a forklift operator is a forklift operator wherever they work, and making each site invent its own job titles produces a matrix nobody can read across.

Individual requirements can still be scoped. When you set one, choose:

All locations

The rule applies everywhere this job title exists. The right default for anything driven by a standard or a company policy.

This location

The rule applies at this site only. For genuine site differences - a confined space that exists at one plant, a client-specific induction.

SCOPE THE REQUIREMENT, NOT THE JOB TITLE

If one site needs something extra, add the extra requirement at **This location** rather than creating a site-specific job title. Duplicated titles split your gap report in half and the two halves quietly diverge.

5 The weekly talk rotation

Rotation decides what ShieldSphere puts up as the next toolbox talk, so a crew gets a sensible year of topics without anyone planning one. It is set per location, on the Toolbox Talks tab.

SETTING	WHAT IT CHANGES
Day of the week	The day the next talk is dated to. Set it to the day you actually hold them.
Industry	Weights the rotation towards the talks that matter for your work, so a warehouse is not offered trenching.
Jurisdiction	United States, Canada, or both - which decides whether the Canadian talks are in the rotation.

The card shows what is **next in rotation**, along with anything flagged as a priority for your industry or a seasonal pick - heat illness in July, cold stress in January.

6 Expiry reminders

ShieldSphere emails when training is coming up for renewal, on a fixed cadence:

WHEN	WHAT IS SENT
30 days before expiry	The first warning - enough notice to book a course.
7 days before expiry	The second warning.
On expiry	The record is marked expired and appears in the expired count and the gap report.

Each reminder is sent once per record, so a record cannot generate the same warning twice. Reminders go to the organization owner, and can be turned off in that person's notification preferences.

TURNING THE EMAILS OFF DOES NOT TURN THE TRACKING OFF

The expired count, the due list and the gap report are all still there. The preference only governs whether an email is sent - which matters if you would rather work from the dashboard than the inbox.

7 Contractors and the employee portal

Two audiences outside your dashboard can be given a view of training, and both are opt-in.

Employees

The employee portal has a **My training** module which, when switched on, lets employees see their own training records, the sessions they attended, and their certificates. It is the cheapest way to stop people asking you for a copy of their forklift card.

Contractors

Contractor personnel can sign in to a session the same way your own people do - the public sign-in page has an **I work for a contractor** switch, and picking their company routes the record to that contractor's crew list rather than your employee roster. Contractors also have their own toolbox talk flow in the contractor portal.

ONE SESSION, THE RIGHT RECORD FOR EACH KIND OF PERSON

You do not run separate sessions for staff and contractors. A single delivery produces employee training records, contractor training records, and a list of anyone unrecognised for you to resolve - which is what makes a mixed crew workable.

8 Signatures and evidence

Sessions require a signature by default, and it is worth leaving that on. A list of names proves attendance was recorded; a signature against an attestation proves the person said they were there and understood the material. Signatures are stored privately and appear on the attendance sheet for the session.

For anything wider than one session - an audit, a client request, an insurance renewal - the **evidence pack** on the Training overview exports sessions, records and attendance across a date range you choose.

DECIDE THE RETENTION QUESTION BEFORE YOU ARE ASKED IT

Training records outlive employment in most regimes, and the attendance sheet is the document that carries the signature. Agree internally how long you keep evidence packs and where, so the answer exists before an auditor asks for it.

9 Troubleshooting

WHAT YOU SEE

WHAT TO DO

The gap report is always empty

The matrix has no requirements. Nothing is a gap until it is required - start from the suggestions drawn from your policies.

Trained people still show as gaps

The requirement's topic name and the training record's name do not match, or the requirement has a renewal interval the record has passed.

A job title appears at a site that does not employ it

Job titles are shared across a client's sites by design. Scope the requirement to **This location** rather than removing the column.

Nobody is getting reminder emails

Check the organization owner's notification preferences - training reminders can be switched off there. Records still track expiry regardless.

A reminder went out only once

That is intended. Each record sends its 30-day and 7-day warning once each, so a long-expired record does not nag forever.

Employees cannot see their training

The **My training** module is off in the portal settings. It is opt-in.

Library talks are locked

The full library, QR sign-in and PDF export are on the paid plans. The ten-talk sampler and recording training you delivered are always available.

Contractor sign-ins land as unmatched

The attendee did not pick their company on the sign-in page. Link them from the session's attendance list.

illustrative; the written steps are what to follow if the two ever disagree.