

Training Sessions

a QR code on the wall, and the sign-in sheet writes itself

How to run a toolbox talk or a training class in ShieldSphere: create the session, put the QR code in front of the crew, watch people sign in, fix anyone the roster did not recognise, and close the session so it becomes training records you can prove.

USER GUIDE – FOR EVERYDAY USERS

VERSION 1.0

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A ShieldSphere training session records one delivery of a toolbox talk or a training class. You create the session, show its QR code, and attendees sign in on their own phones with a name and a signature. Closing the session turns that attendance into dated training records on each person's file, so the proof is a by-product of running the talk.

1 What a session is

A session is one delivery, on one day, to whoever turned up - and it is the thing that turns a talk you gave into training you can prove you gave.

Most safety software asks you to deliver the training in the real world and then, separately, to go back to a desk and type in who was there. The second half is the half that does not happen. A session closes that gap: the sign-in *is* the record. You run the talk, the crew scans a code, and when you close the session ShieldSphere writes a dated training record for every person who signed in.

Sessions come in two kinds, and the kind decides whether the training expires:

KIND	USE IT FOR
Toolbox talk	The five-minute briefing before the shift. No expiry date - a talk is delivered, not held as a qualification.
Training	A real class that someone is credentialed by: forklift, fall protection, confined space. Carries a training type and a renewal interval, so it starts counting down to due.

A SESSION COVERS EVERYONE IN THE ROOM, NOT JUST EMPLOYEES

Employees on your roster, contractor personnel, and people who are on neither list can all sign in to the same session. Each one ends up on the right record: employees get a training record on their file, contractor personnel get a contractor training record, and anyone unrecognised waits for you to sort them out before the session closes.

2 Words you'll see

WORD	WHAT IT MEANS
Session	One delivery of one topic on one date, at one location.
Sign-in window	How long the QR code keeps working. Set when you create the session, extendable later.
Open / Closed	Open means people can still sign in. Closed means sign-in has stopped and the training records have been written.
Attendee	One person on the session's list, however they got there - scanned the code, used the kiosk, or you added them by hand.
Linked	The attendee was matched to a person on your roster, so the record lands on their file.
Unmatched	ShieldSphere could not find that name on the roster. The sign-in is kept; it just needs you to say who it is.
Kiosk mode	The same sign-in page, running on your device, resetting after each person so you can pass it round the room.
Attestation	The tick-box confirming the attendee was there and understood the material. It is what makes the signature mean something.

3 Create the session

Sessions live on the **Sessions** tab of the Training module.

Training → Sessions → New session

Training
Records, sessions, and toolbox talks for Demo Company

Overview 3 expired 3 expiring soon 19 records tracked

Records 3 expired 3 expiring soon 13 current - 0 no expiry

Sessions 1 unmatched 2 open 4 held this week

Toolbox Talks On track 3 talks

Training Matrix 33 missing 1 due Topic by job title matrix

Sessions
Run a talk or a class, show the QR code, and close it to write the records.

Date	Session	Presenter	Attendees	Status	Actions
Sep 8, 2026	Ladder Safety - Three Points of Contact Toolbox talk	Tom Westbrook	8 (1 to link)	Open	Open
Sep 7, 2026	Lockout/Tagout Annual Refresher Training Lockout/Tagout (LOTO)	Derek Calloway	4	Closed	Open
Sep 5, 2026	Hearing Protection in the Press Shop Toolbox talk	Priya Raghunathan	4	Open	Open
Sep 2, 2026	Forklift Operator Refresher Training Forklift/PIT Operator	Tom Westbrook	3	Closed	Open

Sessions. Every delivery at this location, newest first. An attendee count reading "8 (1 to link)" is telling you one sign-in still needs matching to the roster.

1 Choose the kind, then the topic

Pick **Toolbox talk** or **Training**. For the topic you can pick a talk from the ShieldSphere library, search the talks already saved at this location, or simply type a title - *Ladder safety* is a perfectly good topic. Picking a library talk also gives you the script to deliver and, if you want them, its comprehension questions.

2 Say who is leading it and when

Presenter defaults to your name. **Date** defaults to today. There is an optional **Project**, and a **Room or area** box for a note like *Break room* or *Bay 3* - useful later when you are looking at six sessions from the same week.

3 For a Training session, set the type and the renewal

Training type is what the record will be called on each person's file. **Renews every (months)** is what makes it expire - leave it blank for training that never lapses. Get this right at the start: it is what puts the person back on your due list at the right time.

4

Decide on signatures, questions and the window

Require signature is on by default and should usually stay on - a signature is the difference between a list of names and evidence. **Ask comprehension questions** adds up to three questions the attendee answers as they sign in. The sign-in window defaults to 24 hours; you can extend it later without recreating anything.

CREATE THE SESSION BEFORE YOU START TALKING

The QR code exists the moment the session is saved. Make it while the crew is gathering, not after they have gone back to work.

4 Put the QR code in front of the crew

Open the session and you get a **Sign-in QR** panel. It is the same code however you show it, so use whichever fits the room:

Full screen

Throws the code up large on a laptop or a projector. Best for a room with a screen.

Print placard

A one-page PDF with your logo, the topic, the presenter, the date and the code. Tape it to the wall or the toolbox.

Copy link

The plain sign-in URL. Paste it into a group text or a WhatsApp thread for a crew that is spread out.

Kiosk mode

Runs the sign-in on your own device and resets after each person. For crews without phones - see section 6.

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

Sessions

Toolbox talk

Open

Add attendees

Close session

Ladder Safety - Three Points of Contact

Tom Westbrook · Tuesday, September 8, 2026 · Bay 3

Attendance

8 signed in · 1 to link · updates every few seconds

Name

Badge

Roster

Signed

Signature

Actions

EMP-002

Employee

Sep 8, 9:51 PM

Attested

EMP-001

Employee

Sep 8, 9:51 PM

Attested

EMP-003

Employee

Sep 8, 9:51 PM

Attested

EMP-004

Employee

Sep 8, 9:51 PM

Attested

Unmatched

Sep 8, 9:51 PM

Attested

Link

EMP-006

Employee

Sep 8, 9:54 PM

EMP-007

Employee

Sep 8, 9:55 PM

EMP-008

Employee

Sep 8, 9:55 PM

Sign-in QR

Sign-in open for 24 more hours

<https://www.shieldsphearsafety.com/train/de4a812...>

Full screen

Print placard

Copy link

Open kiosk

Extend sign-in window

Crew photo

Sign-in QR. One code per session. Full screen for a projector, the placard for a wall, the link for a group text.

ATTENDEES DO NOT NEED A SHIELDSPHERE LOGIN

The sign-in page is public. Anyone who can scan the code can sign in - that is the point, because the people in front of you are mostly not software users. The code is unguessable and stops working when the window closes or you close the session.

5 What the attendee sees

They scan, and their phone opens a single short page: your logo, the topic, the presenter and the date, then a very small form.

ShieldSphere



TRAINING SIGN-IN

Ladder Safety - Three Points of Contact

Tom Westbrook · Tuesday, September 8, 2026

TSG Safety · Bay 3

Full name

Mar

Maria Santos

I'm not on this list — use the name I typed

I work for a contractor

☐

I attended this training and understood the material.

Signature

Sign here

 Clear

Sign in

Your name, the time, and your signature are recorded as proof of attendance.

Training sign-in. Typing three characters offers matching people from your roster. Picking one links the sign-in as a certainty; **I'm not on this list** keeps the typed name.

1 They start typing their name

After three characters, ShieldSphere offers matching people from your roster. Picking their own name from that list is the best outcome available: it links the sign-in to their record as a certainty rather than a guess, so it can never land in the unmatched pile. If they are genuinely not on the list there is an **I'm not on this list - use the name I typed** escape, and free text works perfectly well.

2 Badge, and whether they are a contractor

Badge or employee ID is optional and helps the match. An **I work for a contractor** switch lets them pick their company, which routes their record to that contractor's crew list instead of your employee roster.

3 They attest and sign

They tick *I attended this training and understood the material*, sign with a finger, and tap **Sign in**. They get *Thank you, you are signed in* and can close the page.

THE TYPE-AHEAD DOES NOT EXPOSE YOUR STAFF LIST

It will not return anything under three characters, never shows more than a handful of names, leaves out anyone no longer employed, and is limited to people employed by the same business as the site running the session. It is built to confirm a name someone already knows, not to browse your roster.

6 People without a phone

Plenty of crews cannot all scan a code, and the answer is **kiosk mode**. It opens the same sign-in page on your device, but after each person submits it clears itself and shows *Signed in. Next person*. instead of a thank-you screen. Hand the tablet round the room and everyone signs on the same device.

The other option is simply to add people yourself. **Add attendee** on the session page lets you pick from the roster for this location, pick contractor personnel, or type a bare name. Both routes end

up in the same attendance list; the source is recorded so you can see later who scanned and who was added by hand.

HAND-ADDED ATTENDEES HAVE NO SIGNATURE

If an auditor is going to want signatures, the kiosk is the better answer than adding names for people. It takes the same amount of time and produces real proof.

7 Watch the sign-ins arrive

The session page lists attendance as it happens - you do not need to refresh. Each row shows the name, the badge they typed, how they signed in, their signature, whether they attested, and whether ShieldSphere matched them to your roster. If you turned on comprehension questions, **Show answers** reveals what each person wrote.



Full screen. "Scan with a phone camera to sign in. No app or login needed." - which is the whole reason this works with a crew who have never seen ShieldSphere.

WATCH THE COUNT, NOT THE NAMES

If fourteen people are in front of you and the count says eleven, you know to ask before anyone leaves. Chasing a missing signature the next day is much harder than chasing it now.

8 Fix an unmatched attendee

An attendee shows as **unmatched** when the name they typed is not one ShieldSphere can find on your roster - a nickname, a misspelling, a genuinely new hire. Nothing is lost: the sign-in and the

signature are kept exactly as given. It just needs you to say who it is, and the row offers two ways to do that.

1 Link to roster

Use this when the person *is* on your roster under a different spelling. Search, pick them, and the attendance attaches to their record.

2 Create employee

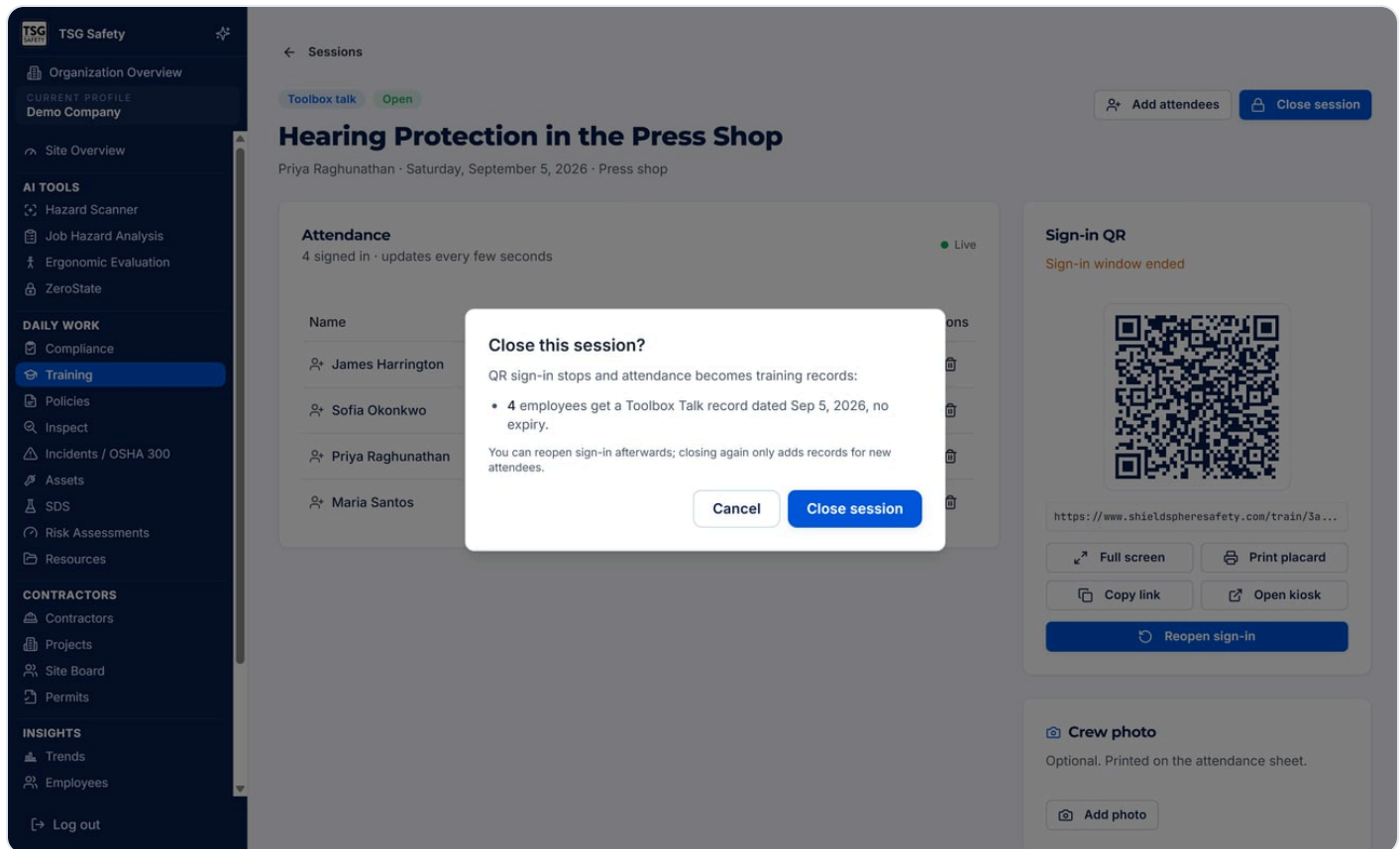
Use this when they are genuinely new. It adds them to the roster from what they typed and links the attendance in one step - which means a brand-new starter's first training record can be created by them signing in.

CLEAR THESE BEFORE YOU CLOSE

Closing the session writes records for the people it can identify. An attendee still unmatched at close is kept on the attendance list and shown as **Still unmatched**, but no training record is written for them - so they will not appear on anyone's file or count towards a requirement.

9 Close the session

When the talk is over and the list looks right, use **Close session**. ShieldSphere tells you exactly what it is about to do before it does it: QR sign-in stops, and attendance becomes training records - so many employee records, so many contractor records.



Close this session? It tells you exactly what it is about to write before it writes it. If the count is lower than the number of people in the room, something is still unmatched.

For a **Training** session, each record carries the training type and the renewal interval you set, so expiry is calculated from the session date and the person joins the due list at the right moment. For a **Toolbox talk**, the record simply says the talk was delivered on that date.

CLOSING EARLY IS NOT A MISTAKE YOU HAVE TO LIVE WITH

If someone turns up late, **Reopen sign-in** puts the code back to work for a number of hours you choose. You can also **Extend sign-in window** before closing at all. Records are written once and only once, so reopening and closing again does not duplicate anyone.

10 Certificates and the attendance sheet

A closed session gives you the paperwork.

The **attendance sheet** is a PDF of the session: topic, presenter, date, and every attendee with their signature and how they signed in. It is the document to hand an auditor or a client asking for proof of a specific talk. There is also an optional **crew photo** you can add to the session, which prints on the sheet - useful when a client wants to see the crew that was actually there.

Certificates can be issued for the training records the session wrote, from the **Certificates** card on the session. ShieldSphere skips anyone who already has one on file, so pressing it twice is safe.

THE EVIDENCE PACK COLLECTS IT ALL

For a date range rather than a single session - an audit, a client request, an insurance renewal - use the evidence pack on the Training overview. It gathers sessions, records and attendance into one export. That is covered in the **Training User Guide**.

11 Troubleshooting

WHAT YOU SEE

WHAT TO DO

The QR code does nothing

The sign-in window has probably closed. Open the session and use **Reopen sign-in** or **Extend sign-in window**.

Everyone is coming through unmatched

The roster for this location is empty or the names are stored differently to how people say them. Sign-ins are still safe; link them, or use **Create employee** to build the roster from the sign-ins themselves.

"You are already signed in"

That person has already been recorded on this session. It is a duplicate guard, not an error.

"Too many attempts from this device"

A rate limit, most often when a whole crew signs in over one hotspot. Wait a minute and continue.

An attendee cannot sign on their phone

Their browser may be blocking the drawing area. Use kiosk mode on your device instead - the signature is the point, so prefer that over turning signatures off.

Someone signed in twice under two spellings

Remove the wrong row from the attendance list before you close. Removal is per attendee and asks first.

Records were not written for a contractor

Check the attendee picked their company on the sign-in page. Without it they are treated as an unrecognised person rather than contractor personnel.

The count is right but a name looks wrong

Attendees are recorded exactly as they typed. Use **Link to roster** to attach the sign-in to the right person; the typed name is kept as part of the evidence.

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