

Training

who is trained, who is due, and the proof

How to use the Training module day to day: read the overview, keep training records, deliver toolbox talks from a library of 120, decide what each job title is required to hold, and pull an evidence pack when someone asks for proof.

USER GUIDE – FOR EVERYDAY USERS

VERSION 1.0

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ShieldSphere's Training module is where you keep every training record, deliver toolbox talks, and prove both. It tracks what each person holds and when it expires, defines what each job title is required to have, and turns a delivered session into dated records automatically. When someone asks for evidence, one export covers the period they asked about.

1 What Training does

Training answers three questions that usually take three different filing systems: what has this person been trained on, what are they supposed to have, and can you prove it.

The module has five tabs, and they build on each other:

TAB	WHAT IT IS FOR
Overview	The state of training at this location - current, expiring, expired - plus what is due in the next 30 days and what is open.
Records	Every training record for every employee. Add, edit, import from a spreadsheet, attach certificates.
Sessions	Deliveries. Create a session, show a QR code, and attendance becomes records. Covered in its own guide.
Toolbox Talks	A library of 120 ready-to-deliver talks, plus talks generated from your own policies or any topic you name.
Requirements	A matrix of training topics against job titles, and the gap report that falls out of it.

Daily Work → **Training**

TSG Safety

Organization Overview

CURRENT PROFILE

Demo Company

Site Overview

AI TOOLS

Hazard Scanner
Job Hazard Analysis
Ergonomic Evaluation
ZeroState

DAILY WORK

Compliance

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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

On track

Topic by job title matrix

Current

6

Expiring soon

3

Expired

3

No expiration

0

Training due in 30 days

3 expired · 3 expiring soon

OVERDUE · Action required now

3

Hazard Communication (GHS/HazCom) Annual Refresher

Rachel Nguyen · Hazard Communication (HazCom)

Overdue 182 days

Lockout/Tagout Annual Refresher Training

James Harrington · Lockout/Tagout (LOTO)

Overdue 24 days

Annual Respiratory Protection Training & Medical Evaluation

Derek Calloway · Respiratory Protection

Overdue 3 days

DUE IN 30 DAYS · Plan now to avoid lapses

3

Hazard Communication (GHS/HazCom) Annual Refresher

James Harrington · Hazard Communication (HazCom)

Due in 12 days

Annual Respirator Fit Test & Training

Maria Santos · Respiratory Protection

Due in 21 days

Lockout/Tagout Annual Refresher Training

Tom Westbrook · Lockout/Tagout (LOTO)

Due in 28 days

Sessions

Run a talk or a class, show a QR code, and turn attendance into records.

Toolbox talks

Generate talks from your policies or any custom topic.

Training. The tab badges are the fastest read on the page - they carry the counts that need action before you open anything.

TOOLBOX TALKS USED TO BE ITS OWN SIDEBAR ITEM

It is now the **Toolbox Talks** tab inside Training, alongside the records the talks produce. Old links and bookmarks to the standalone page still work - they forward to the right tab.

2 Words you'll see

WORD	WHAT IT MEANS
Training record	One person, one topic, one completion date - and an expiry date if that training lapses.
Renewal interval	How many months the training stays valid. Blank means it never expires.
Current / Expiring soon / Expired	The three states a record can be in. "Expiring soon" is the 30-day warning.
Session	One delivery of a talk or class. Closing it writes records for everyone who signed in.
Library talk	One of the 120 talks ShieldSphere ships, written and ready to deliver.
Requirement	A rule saying a job title must hold a given training. What creates a gap when it is missing.
Gap	A person who is required to hold a training and does not, or whose record has expired.
Evidence pack	An export of sessions, records and attendance over a date range, for an audit or a client.

3 The Overview tab

Four tiles count the records at this location: **Current**, **Expiring soon**, **Expired** and **No expiration**. Below them, **Training due in 30 days** is the working list - the people to book onto something this month.

The tabs themselves carry counts, which is usually the faster read. A number on **Sessions** means attendees are still unmatched or a session is still open. A number on **Requirements** means someone is missing training they are required to hold.

START AT THE BADGES, NOT THE TILES

The tiles tell you the shape of the problem. The badges tell you what has an action waiting behind it. If every badge is clear, there is nothing on this page that needs you today.

4 Records: the training tracker

The **Records** tab is the roster of what everyone holds. Each row is one person's training: the topic, when they completed it, when it expires, and whether a certificate is on file.

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

Total 19 Current 13 Expiring Soon 3 Expired 3 No Expiry 0

Search employees or trainings... All Status Normalise types Import + Employee + Training

Employee	Training	Type	Completed	Expires	Status	Actions
Rachel Nguyen Quality Control	Hazard Communication (GHS/HazCom) Annual Refresher OSHA Safety Training Institute	Hazard Communication (HazCom)	Mar 10, 2025	Mar 10, 2026	Expired	🔍 ✎ 🗑
James Harrington Production	Lockout/Tagout Annual Refresher Training SafeStart Safety Solutions	Lockout/Tagout (LOTO)	Aug 15, 2025	Aug 15, 2026	Expired	🔍 ✎ 🗑
Derek Calloway Maintenance	Annual Respiratory Protection Training & Medical Evaluation Industrial Safety Solutions LLC	Respiratory Protection	Sep 5, 2025	Sep 5, 2026	Expired	🔍 ✎ 🗑
James Harrington Production	Hazard Communication (GHS/HazCom) Annual Refresher OSHA Safety Training Institute	Hazard Communication (HazCom)	Sep 21, 2025	Sep 21, 2026	12d left	🔍 ✎ 🗑
Maria Santos Warehouse	Annual Respirator Fit Test & Training In-house	Respiratory Protection	Sep 30, 2025	Sep 30, 2026	21d left	🔍 ✎ 🗑
Tom Westbrook Safety	Lockout/Tagout Annual Refresher Training In-house	Lockout/Tagout (LOTO)	Oct 7, 2025	Oct 7, 2026	28d left	🔍 ✎ 🗑
Derek Calloway Maintenance	Annual Fall Protection Refresher Course National Safety Council	Fall Protection	May 12, 2026	May 12, 2027	Current	🔍 ✎ 🗑
Tom Westbrook Safety	First Aid/CPR/AED Certification Course American Red Cross	First Aid/CPR/AED	Jun 12, 2025	Jun 12, 2027	Current	🔍 ✎ 🗑
Rachel Nguyen Quality Control	PPE Selection, Use and Care In-house	Personal Protective Equipment	Jul 11, 2026	Jul 11, 2027	Current	🔍 ✎ 🗑
James Harrington Production	Machine Guarding & Point-of-Operation Safety In-house	Machine Guarding	Jul 26, 2026	Jul 26, 2027	Current	🔍 ✎ 🗑

Records. One row per person per training. Status is derived from the expiry date, so it is never something you have to remember to update.

1 Add a record by hand

Pick the employee, name the training, set the completion date, and set the renewal interval if it expires. The expiry date and the status follow from those - you never set a status yourself.

2

Import a spreadsheet

If your history lives in Excel, import it rather than retyping it. This is the usual way to start: bring in what you already have, and let sessions handle everything from today onwards.

3

Attach the certificate

Upload the certificate the training provider issued. An uploaded certificate always wins over one ShieldSphere generates, because the provider's document is the one an auditor wants.

MOST RECORDS SHOULD NOT BE TYPED AT ALL

Anything you deliver yourself is better recorded by running a session - the record, the signature and the attendance sheet all come out of it at once. Keep manual entry for training done by an outside provider.

5 Toolbox Talks

Three ways to get a talk, and they suit different moments.

The library

ShieldSphere ships **120 talks across 15 categories** - general safety, PPE, falls and working at height, electrical, machines and tools, forklifts and vehicles, chemicals and HazCom, confined spaces, fire and emergencies, ergonomics, environmental and seasonal, construction, warehousing and manufacturing, health and wellness, and a Canada set. Each one is written to be read out as it stands. The **30 most-used talks also have a Spanish version**.

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

Library My talks 3 Generate

ShieldSphere talk library
120 ready-to-deliver talks. Add one to this location, schedule it, present it, or print the sign-in sheet.

Search talks (ladders, heat, forklifts...)

All Industries US CA

All topics General safety & culture PPE Falls & working at height Electrical Machines & tools Forklifts & vehicles Chemicals & HazCom Confined spaces & atmospheres Fire & emergencies

Ergonomics & body Environmental & seasonal Construction Warehousing & manufacturing Health & wellness Canada

GENERAL SAFETY & CULTURE
Speaking Up: Stop-Work Authority
Anyone can stop a job that looks wrong. The cost of a pause is minutes. The cost of staying quiet can be permanent.
⌚ 5 min

GENERAL SAFETY & CULTURE
Near Misses: Why We Report Them
A near miss is a free lesson. Report it while it is still free, because the next time the same setup may not miss.
⌚ 4 min

GENERAL SAFETY & CULTURE
Housekeeping Is Safety
Clutter causes trips, fires, and blocked exits. Clean as you go, because the mess never gets easier to deal with later.
⌚ 4 min

GENERAL SAFETY & CULTURE
Situational Awareness on the Job
Know what is around you, what is above you, and what is about to move. Awareness is a habit you build, not a personality trait.
⌚ 4 min

GENERAL SAFETY & CULTURE
Complacency: The Silent Hazard
Experience makes you fast, and fast makes you skip steps. The tasks you have done a thousand times deserve the same walk-through as th...
⌚ 4 min

GENERAL SAFETY & CULTURE
Looking Out for New Workers
New workers get hurt at a much higher rate in their first weeks. Pair them up, explain the why, and make it easy for them to ask.
⌚ 5 min

GENERAL SAFETY & CULTURE
Rushing and Shortcuts
Shortcuts save minutes right up until the one that does not. If the safe way is too slow, the answer is to fix the method, not to skip it.
⌚ 4 min

GENERAL SAFETY & CULTURE
Fatigue and Shift Work
Long hours and night shifts slow your reactions and your judgment the way alcohol does. Plan for it instead of pretending you are the exception.
⌚ 5 min

GENERAL SAFETY & CULTURE
Phones and Distraction at Work
Your attention is single-threaded. A phone glance during a lift, a crossing, or a cut is long enough for the event to happen.
⌚ 4 min

GENERAL SAFETY & CULTURE
Horseplay and Workplace Conduct

GENERAL SAFETY & CULTURE
Recognizing Workplace Violence Warning Signs

GENERAL SAFETY & CULTURE
Why We Track Incidents (OSHA 300)

The library. 120 talks in 15 categories. Nothing to write - pick one and deliver it.

Generated from your own policies

ShieldSphere can write a talk from one of your written policies, so the briefing says what your policy actually says rather than something generic. You can also describe any hazard and get a custom talk on it.

From a hazard you found

When a hazard turns up in an inspection or a scan, you can go straight from it to a talk on that hazard - the fastest honest route from "we found this" to "we briefed the crew on it".

Delivering one

Presenter mode puts the talk full screen in the sections you actually read out - overview, why it matters, discussion points, safety reminders, and questions to ask the crew - with the session QR

alongside so people can sign in while you talk. There is also a branded PDF if you would rather work from paper.

Rotation settings pick the next talk for you: choose a day of the week, your industry and your jurisdiction, and ShieldSphere suggests what to run next, weighted to what matters for your industry and the season.

A TALK IS NOT A RECORD UNTIL IT IS DELIVERED

Scheduling or generating a talk proves nothing on its own. The training record appears when you run it as a session and close it - see the **Training Sessions User Guide**.

6 Requirements: the training matrix

The matrix is where you say what each job title must hold. Training topics run down the side, job titles across the top, and you tick the cells where that title needs that training.

TSG Safety

Organization Overview

CURRENT PROFILE

Demo Company

Site Overview

AI TOOLS

Hazard Scanner

Job Hazard Analysis

Ergonomic Evaluation

ZeroState

DAILY WORK

Compliance

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Training

Records, sessions, and toolbox talks for Demo Company

Overview

Records

Sessions

Toolbox Talks

Training Matrix

3 expired 3 expiring soon

3 expired 3 expiring soon

1 unmatched 1 open

On track

33 missing 1 due

12 records tracked

6 current 0 no expiry

1 held this week

3 talks

Topic by job title matrix

Training matrix

Tick the training each job title needs. 9 topics - 5 job titles

Add a job title

Suggest from policies

Add topic

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					

The matrix. Say it once per job title and it applies to everyone who holds that title, including people hired next year.

1

Add the job titles you employ

Add a column per job title. By default a job title is shared across all of a client's sites, because a forklift operator is a forklift operator wherever they work - but a requirement can be set for **This location** only when a site genuinely differs.

2

Add the topics

Pick from the preset topics or name your own, and set a renewal interval so the requirement expires the way the training does. ShieldSphere also suggests topics from the policies you already hold at that location, which is the quickest way to a defensible matrix.

3

Read the gap report

Who is due lists every person who is required to hold a training and does not, or whose record has expired. Filter by job title or by required training, and start a session straight from a gap - the session opens already filled in for that topic and its renewal interval.

"EVERYONE IS CURRENT ON THEIR REQUIRED TRAINING"

That message is the goal state, and it means something specific: it is measured against the requirements you set. An empty matrix will always report everyone current, so the matrix is what makes the gap report worth reading.

7 Evidence packs and exports

When a client, an auditor or an insurer asks what training you have done, the **evidence pack** is the answer. Give it a date range, choose what to include, and it gathers the sessions, the training records and the attendance behind them into one export.

If you only want the numbers, you can take **Records CSV only** or **Sessions CSV only** instead and work with them in a spreadsheet.

ASK FOR THE PERIOD THEY ASKED ABOUT

Requests are almost always framed as a period - "the last twelve months", "since the contract started". Set that range rather than exporting everything: a pack that answers the question exactly is far more convincing than one that buries it.

8 Certificates

ShieldSphere can issue a certificate for any training record, and for forklift training it issues a wallet card naming the truck types the person is signed off on - which is the thing an operator is actually asked to produce on a site.

Certificates can be issued in bulk from a closed session, or one at a time from a record. If the training provider gave you their own certificate, upload it: an uploaded certificate always takes precedence over a generated one.

9 Troubleshooting

WHAT YOU SEE

WHAT TO DO

The gap report says everyone is current, and you know they are not

The matrix is empty or the topic is not required for that job title. Gaps are measured against requirements, so add the requirement first.

A job title column is missing at one site

Job titles are shared across a client's sites by default. If it is genuinely missing, add it - and check whether the requirement was set to **This location** when it should be all locations.

Someone has training but still shows as a gap

Check the record's expiry date, and check the training name matches the required topic. A record for "Forklift" does not satisfy a requirement named "Powered industrial truck".

A talk is locked

The full library, session sign-in and PDF export are on the paid plans. The sampler of ten talks stays open, and recording training you delivered is never blocked.

An old Toolbox Talks bookmark

It still works - it forwards to the Toolbox Talks tab inside Training.

Records from a session did not appear

The session is probably still open. Records are written when you close it. See the **Training Sessions User Guide**.

An import brought in names in the wrong order

Names given as "LAST, FIRST" are normalised on import and at sign-

in, so they match the roster either way. If a name still looks wrong, correct it on the employee record.

ShieldSphere Training – User Guide. Published at shieldspheresafety.com/guides/training-user. Screens are illustrative; the written steps are what to follow if the two ever disagree.