Safety Toolbox
User Guide

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Adding a New Certification

1. On the Certifications page, click the 'Add Certification' button at the bottom.

Certifications

Sort By: Expiry Date ⌄   Search items... 🔍   Refresh

First Name	Last Name	Certification	Trained On Date	Expiry Date	View PDF	Edit Certification
Joe	Jones	Cranes/Slings	2021-08-17	2024-01-20	📄	✏️
Joe	Jones	Lock Out Tag Out	2021-04-30	2024-02-15	📄	✏️
Bob	Bobington	Tower Motor Safety	2019-12-20	2024-04-30	📄	✏️
Sue	Snow	Bio Hazard	2020-07-15	2024-07-20	📄	✏️
Bob	Bobington	WHIMIS Training	2020-12-20	2024-08-30	📄	✏️
Joe	Jones	WHIMIS Training	2021-12-20	2024-08-30	📄	✏️
Sue	Snow	Fire/Emergency		2024-08-30	📄	✏️
Sue	Snow	WHIMIS Training	2022-12-20	2024-08-30	📄	✏️
Bob	Bobington	Lifting	2020-06-01		📄	✏️

Add Certification

2. On the Add/Edit Certification page, select your employee's name, the certification type you would like to add for them, and the train date and expiry date if they exist.

Add/Edit Certification

Fill out the fields below. If the chosen certification already exists for the chosen employee, the other information will be updated accordingly.

Employee: Joe Jones ⌄

Certification Type: Lifting ⌄

Date Trained: 2024-04-05 📅 ☐ There is no trained on date

Expires On: 2024-06-13 📅 ☐ There is no expiry date

Next Step

3. Click the 'Next Step' button.

4. The Choose Certification File gives you a final look of what will be saved. If you need to correct something, you can go back to the last page and correct it. Finally, if you have the pdf file of the certification, you can upload it now. If you do not want to associate this certification with a file, click the 'No file to attach' button.

Choose Certification File

File will be saved as:

2-Joe Jones-Lifting.pdf

Date trained: 2024-04-05   Expiry Date: 2024-06-13

Pick Certification PDF

No file to attach

5. Once you've made your decision, you will be taken to the confirmation screen, and then back to the Certifications page. Click the 'Refresh' button to refresh the list, and your new entry will be present.
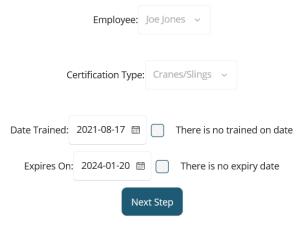
Editing an Existing Certification

1. There are two methods of editing a certification. The first is overwriting it by following the steps for adding a new certification for the employee and certification type you want, and the second is by editing a specific entry on the list.

2. In this example, to update the Cranes/Slings Certification for Joe Jones, we will click the pencil button in the 'Edit Certification' column on the far right.

Certifications

Sort By: Expiry Date ⌄   Search items... 🔍   Refresh

First Name	Last Name	Certification	Trained On Date	Expiry Date	View PDF	Edit Certification
Joe	Jones	Cranes/Slings	2021-08-17	2024-01-20	🗋	✏

3. Doing so takes you to the Add/Edit Certification page with the employee and certification fields already filled out. Select the new train date and expiry date if they exist.

Add/Edit Certification

Fill out the fields below. If the chosen certification already exists for the chosen employee, the other information will be updated accordingly.

Employee: Joe Jones ⌄

Certification Type: Cranes/Slings ⌄

Date Trained: 2021-08-17 📅   ☐ There is no trained on date

Expires On: 2024-01-20 📅   ☐ There is no expiry date

Next Step

4. After clicking 'Next Step', choose whether you would like to upload a pdf certification.

Choose Certification File

File will be saved as:

2-Joe Jones-Cranes/Slings.pdf

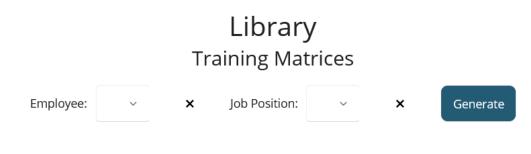Date trained: 2024-04-05   Expiry Date: 2026-06-10

Pick Certification PDF

No file to attach

5. Once you've made your decision, you will be taken to the confirmation screen, and then back to the Certifications page. Click the 'Refresh' button to refresh the list, and your edited entry will be updated.

The Three Versions of Training Matrices

Generating a Training Matrix for an Employee

1. In the library, go to the Training Matrices page.

Library
Training Matrices

Employee: [⌄] ✕ Job Position: [⌄] ✕ [Generate]

2. Select your chosen employee from the dropdown and click the generate button, leaving the Job Position dropdown blank.
3. The app will automatically generate a training matrix based on the employee's current job position, and what certifications are required for that position. It will then search to see if that employee has these records in the database. If they do not have a needed certification, you will be notified with red text. If they do, the date they were trained on will be displayed if applicable.
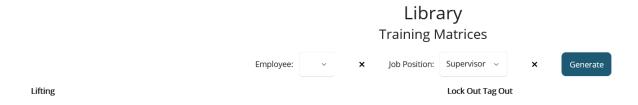
Library
Training Matrices

Employee: [Bob Bobington ⌄] ✕ Job Position: [⌄] ✕ [Generate]

Cranes/Slings
Training Record Not Found

Tower Motor Safety
Trained On: 2019-12-20

Generating an Empty Training Matrix for a Specific Job Position

1. In the library, go to the Training Matrices page.

Library
Training Matrices

Employee: [⌄] ✕ Job Position: [⌄] ✕ [Generate]

2. Select a job position from the dropdown, leaving the Employee dropdown blank, and click the 'Generate' button.
3. The app will generate a blank training matrix with the requirements for that specific position.

Generating a Training Matrix for Any Employee in Any Job Position

1. In the library, go to the Training Matrices page.

2. Select any employee and any job position and click the 'Generate' button.
3. A matrix will be generated for that employee with the job requirements for the chosen position. If they do not have a needed certification, you will be notified with red text. If they do, the date they were trained on will be displayed if applicable.