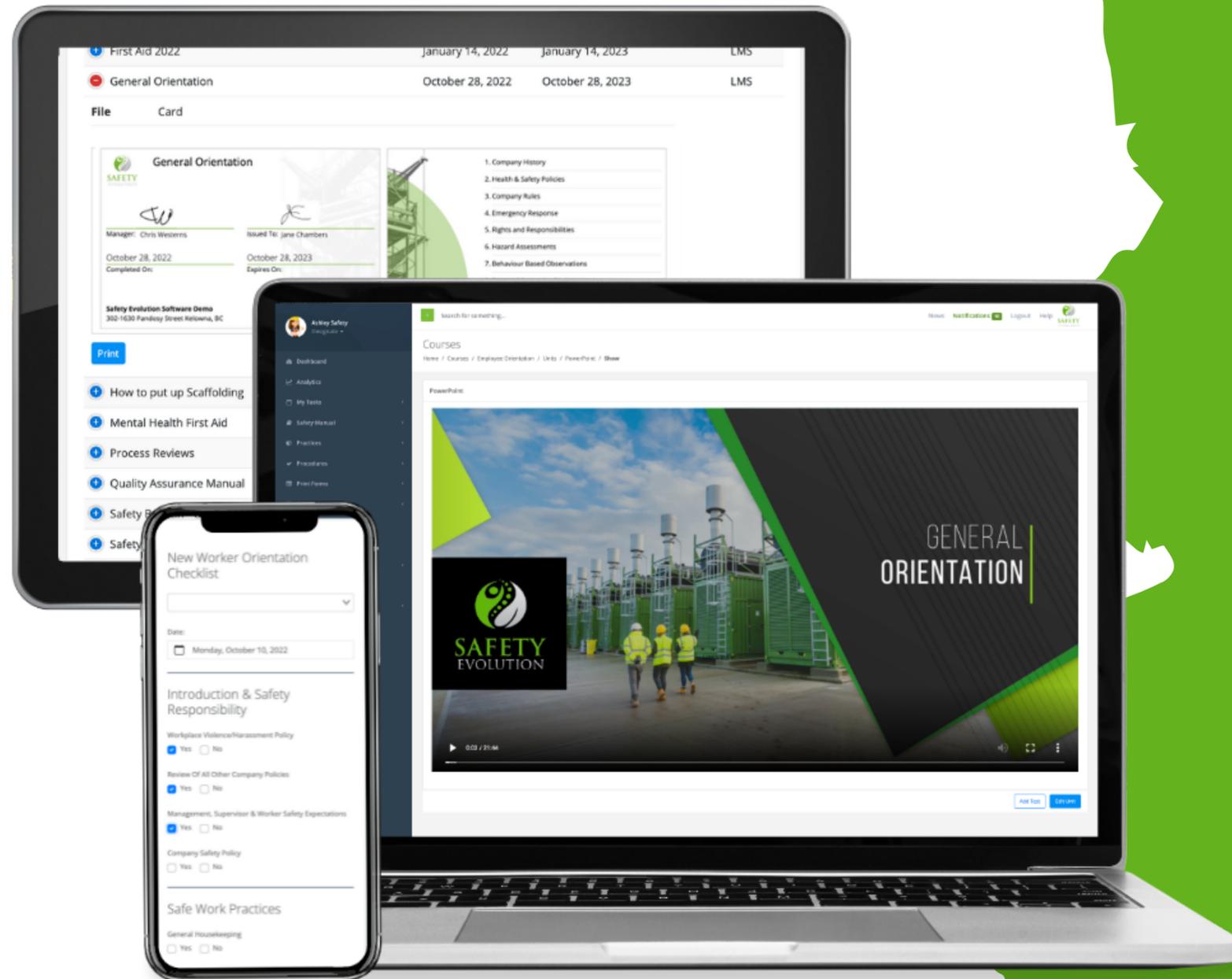


# EMPLOYEE MANAGEMENT

## Training Guide



## Want Consistent Orientations Delivered Every Time?

Deliver consistent orientations, anytime/anyplace. Build, assign, deliver and track employee orientations, onboarding checklists and worker certificates in one central location.

## Tired Of Chasing Workers To Get Re-Certified?

Choose from over 50+ Danatec and ALARA online training courses and never chase a workers certificate again. Safety Evolution's Learning Management System does it all: assign, track, auto-upload certificates and 30-day expiry notifications.

# Objectives

» By the end of this training guide, you will have an understanding of:

1

## Onboarding & Orientation

Build your custom orientations and training courses

2

## Course Library

Access to Industry leading 3rd party Training Providers

3

## Invites & Onboarding

Workers Profiles are created with a system invite

4

## Hours Worked

Add Hours to each site for Power Bi Analytics

5

## Training Matrix

Drill down and dispatch the right person for the job!



# Custom Onboarding & Employee Orientation



» Build your custom orientations and training courses

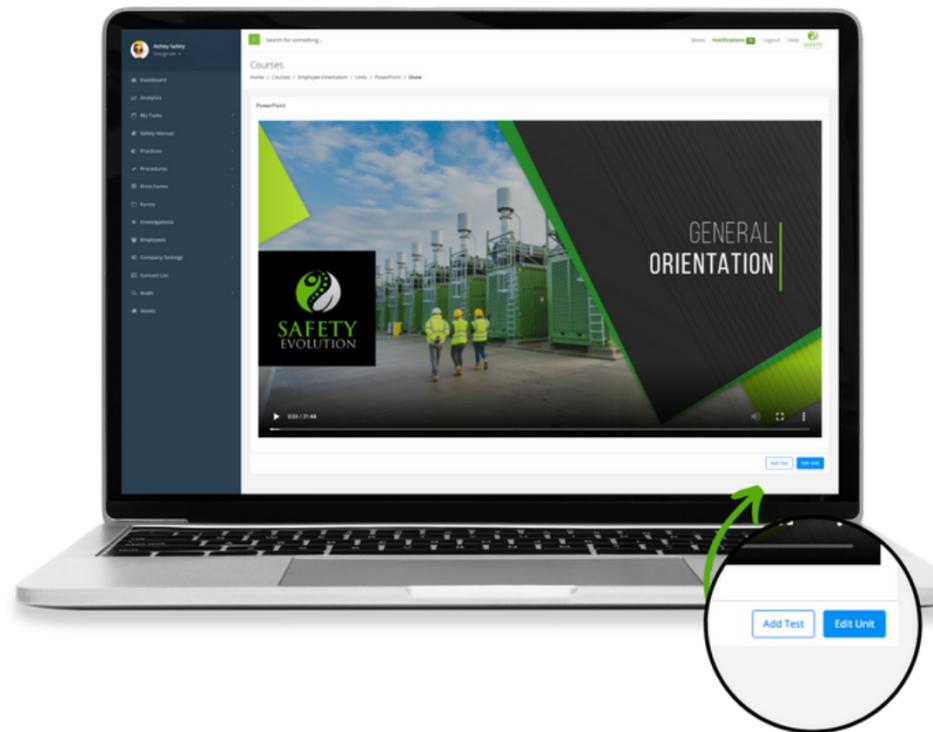
Create a **Custom Course** in the **Training** section. Give it a **Course/Certification Name** and **Certificate Duration** or choose **Does Not Expire**.

We recommend breaking your content into multiple **Units** inside each course. Giving you the opportunity for a **Test/Quiz** behind each unit and testing the employee's knowledge as they learn.

We recommend you **Edit Course Settings** to add a description, such as the units you created. This will populate onto the backside of the auto-generated certificate.

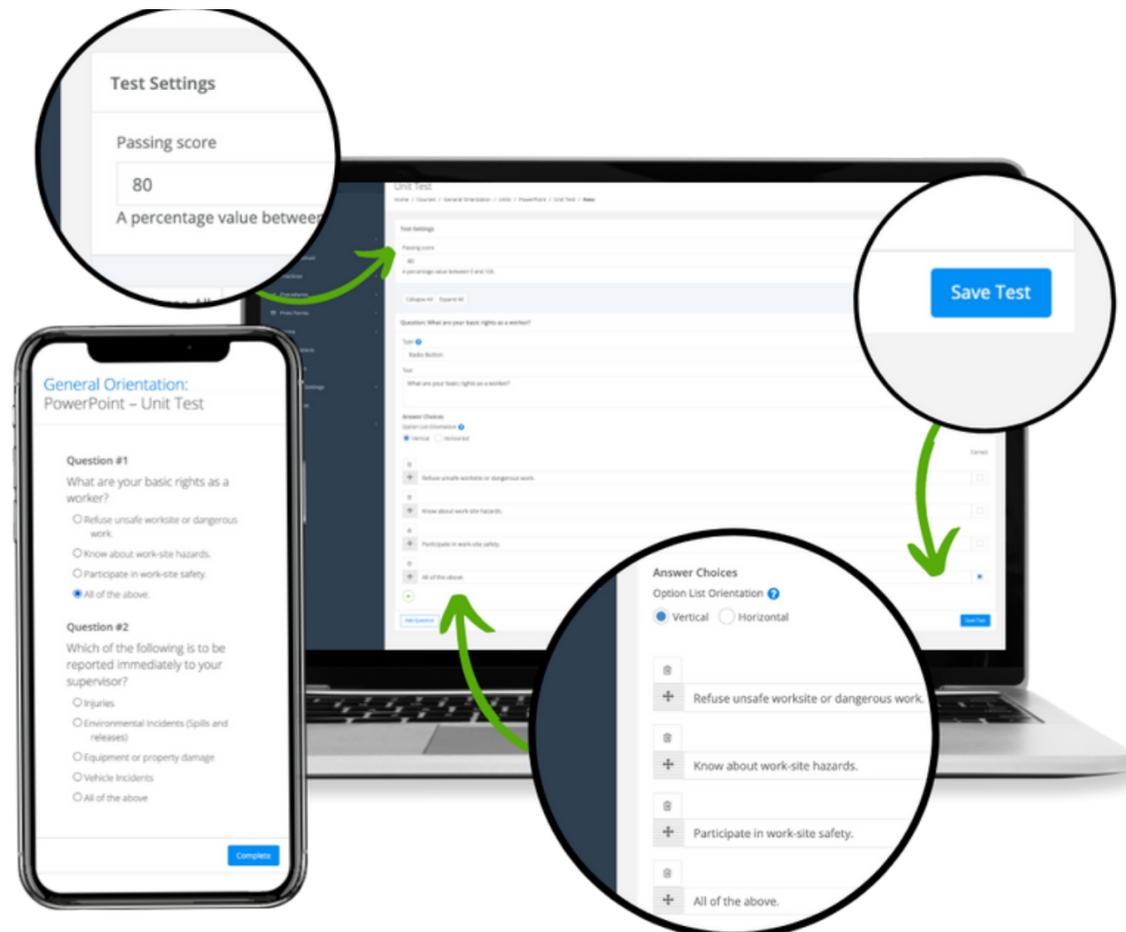
Easily upload your company's new employee company orientation, YouTube training videos, etc. into the system.

- **Upload** Videos
- **Embed** PowerPoints from OneDrive
- **Link by URL** for Youtube or Vimeo



# Custom Onboarding & Employee Orientation

## » Upload an Orientation Quiz with a custom Passing Rate



The system will automatically grade each employee's quiz as a pass or fail with further instructions.

- **Add Test**
- Set custom **Pass Rate**
- Add questions and **chose the correct answer**

Once the employee passes, a certificate will be automatically generated by the system. Always have proof the information was communicated to your workers.

- The certificate will be found in the worker **Profile**
- **Training Matrix** will be updated
- Admin who assigned the course will receive a **Notification** the employee has been "certified in a course"



# Custom Onboarding & Employee Orientation

» Select mandatory Orientation material & the LMS takes care of the work.

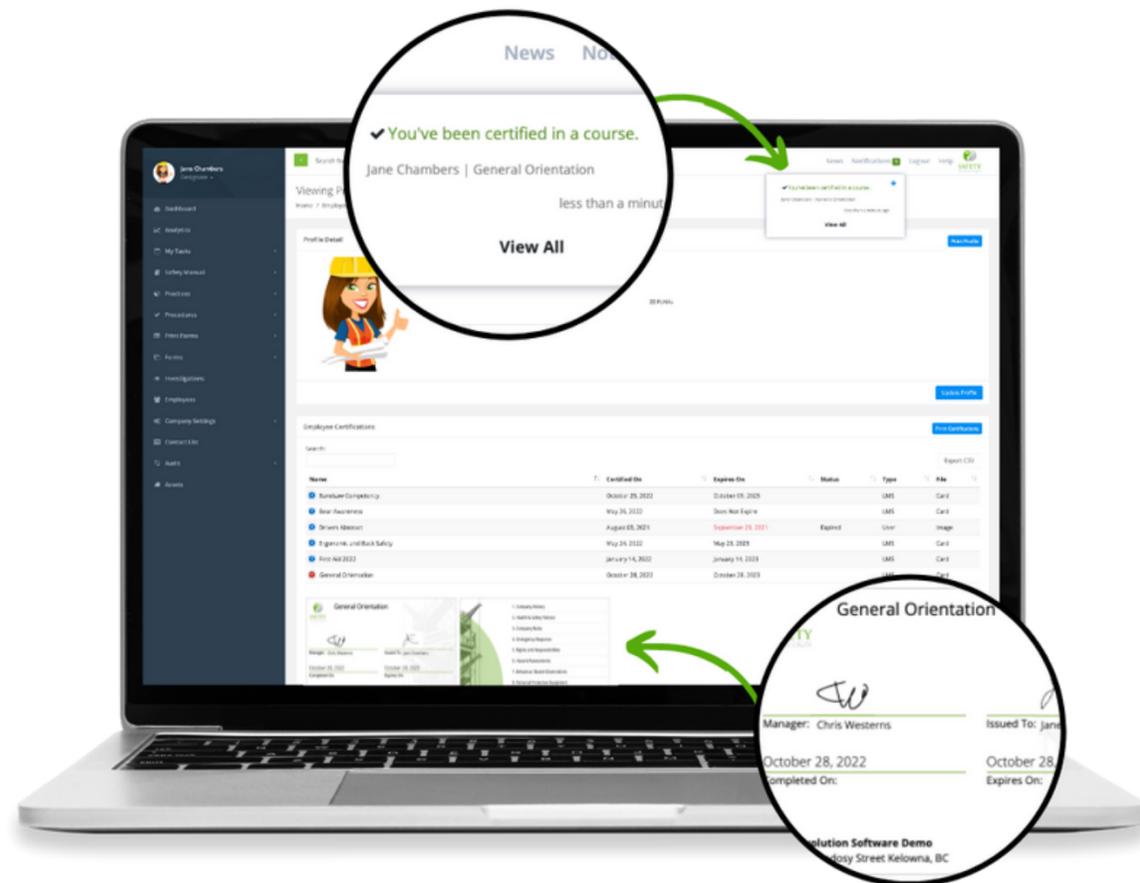
Add the course as a **mandatory system Orientation Course**.

Every time you invite a new employee, the system will send the courses in their email invite.

Admins will receive a **Notification** once the worker has completed the course.

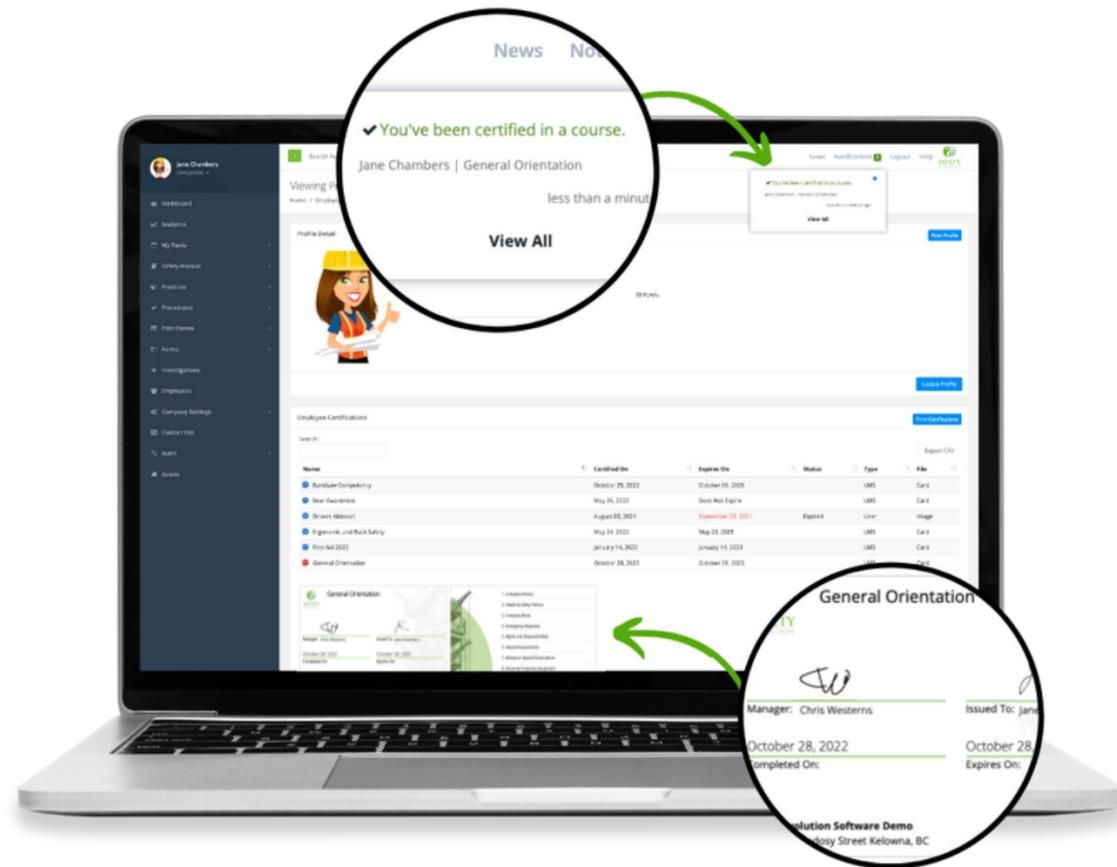
The **Training Matrix** and **Employee Profile** will be automatically updated with a **system-generated certificate** with both area manager and employee signatures.

Best of all, workers have access to their certificates on their devices 24/7.



# Custom Onboarding & Employee Orientation

» Create, track and store onboarding checklists.



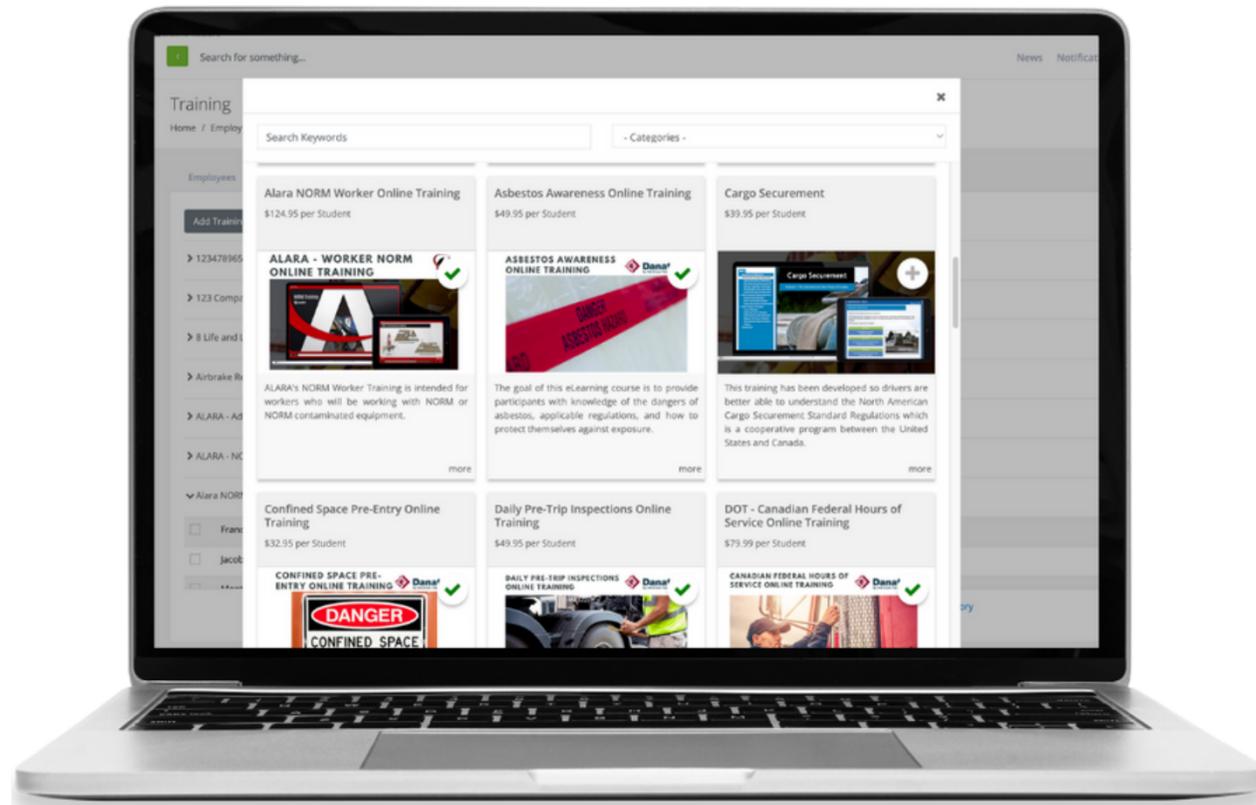
Upload your custom site onboarding checklists or edit a Library Template to make your own in the **Form Designer**. All of your new employee onboarding checklists will be available in one central location!

- We recommend tagging them as Quality Control or Company Forms
- The Safety Evolution system does not handle: Tax documents, or government-issued forms (these items can be uploaded to the Reference Document Area as an Onboarding Package File for easy access)



# Integrated Learning Management System With Premium Courses

» You need the process to be fast, with one central place to assign training!



Access premium online training designed by leading experts in the field. 50+ **Danatec** and **ALARA** online training courses are available in your Learning Management System to assign anytime.

TDG online training, WHMIS (GHS), Fall Protection Awareness, Ground Disturbance, and many more.

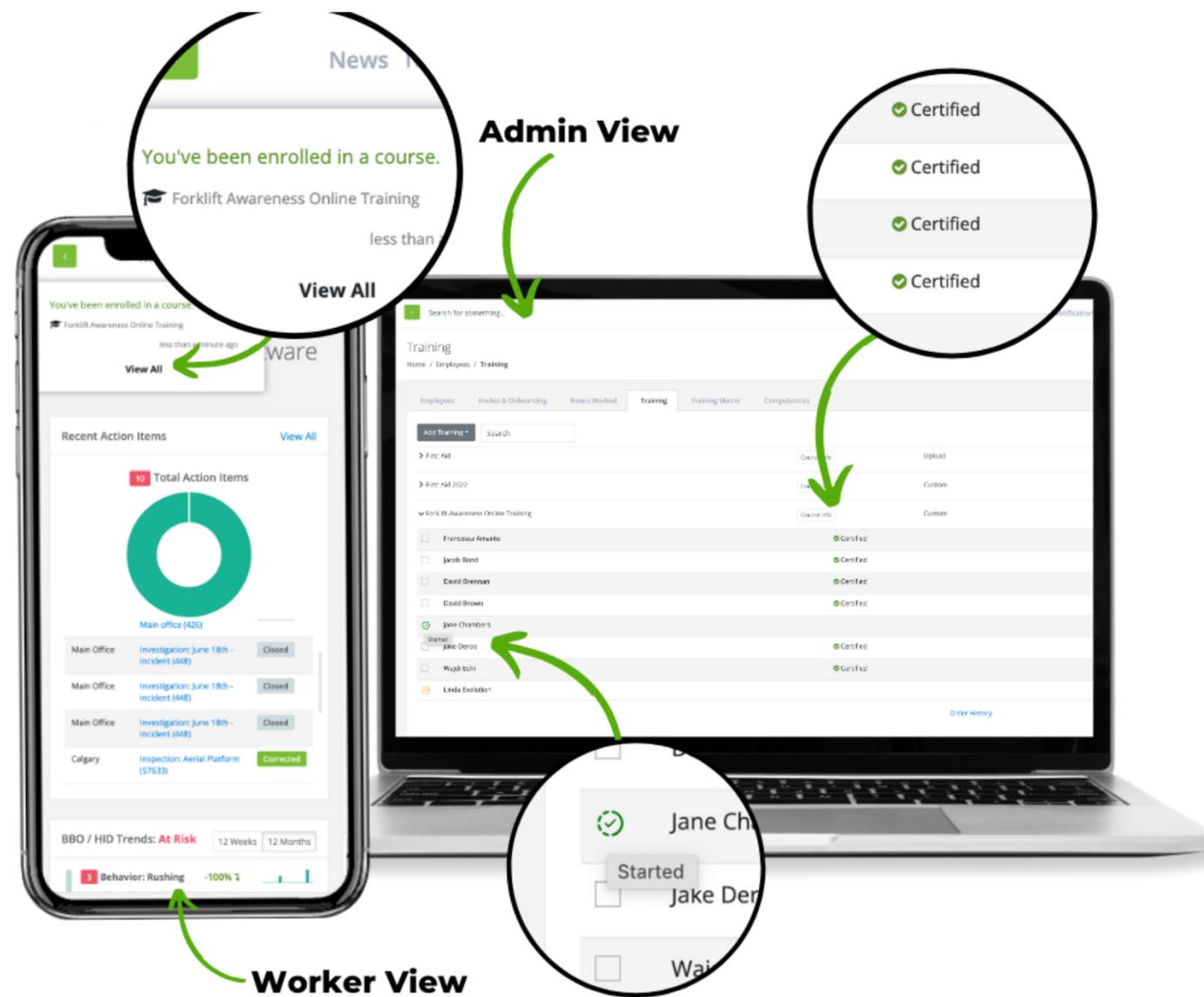
Select the + button to add the course to your Training Library for assignment to your workforce.

*Employees -> Training -> Add Training -> Browse Course Library*



# Integrated Learning Management System With Danatec, ALARA

» Track the progress of assigned training courses in your Learning Management System.



An email **Notification** is sent to the worker letting them know they have been assigned a training course.

Monitor their progress in the **LMS** to see who has been enrolled, unstarted, started and certified. No extra third-party software is needed.

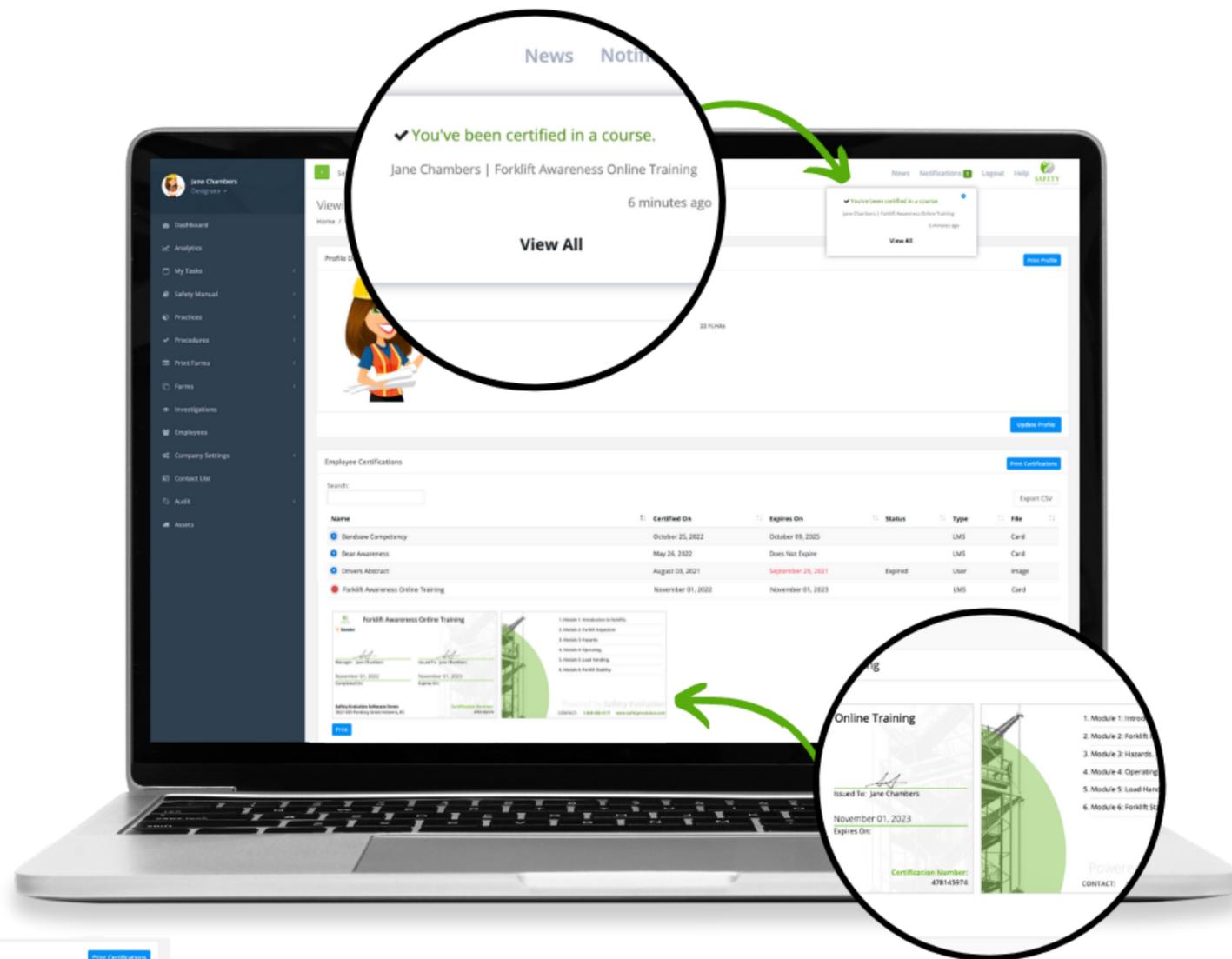


# Integrated Learning Management System With Danatec, ALARA

» Training certificates automatically upload into Workers Profiles & Training Matrix.

Once the worker has been certified, the system will generate a training certificate branded with course details, your company's logo, business details, manager and worker's signature.

The certificate will be auto-uploaded into the employee **Profile** and **Training Matrix** to be accessible by managers and the worker in the field.



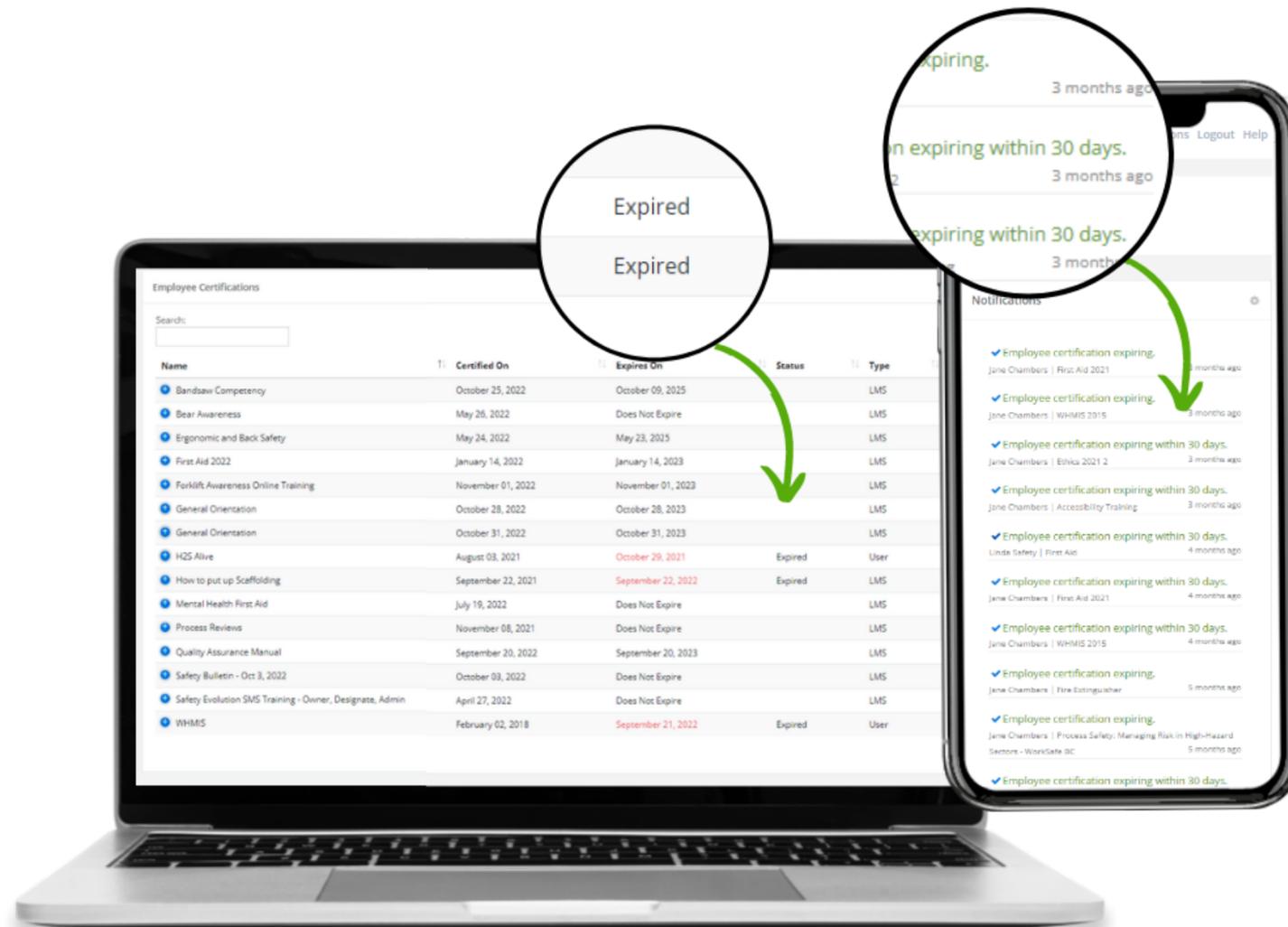
# Integrated Learning Management System With Danatec, ALARA

» 30-Day Expiry Notifications to management and workers.



New **Expiry Dates** are set for certificates within the employee **Profile** and **Training Matrix**.

The system will send a **30-day and day-of-expiry notification** to the worker and Admin so you can easily set up re-training.

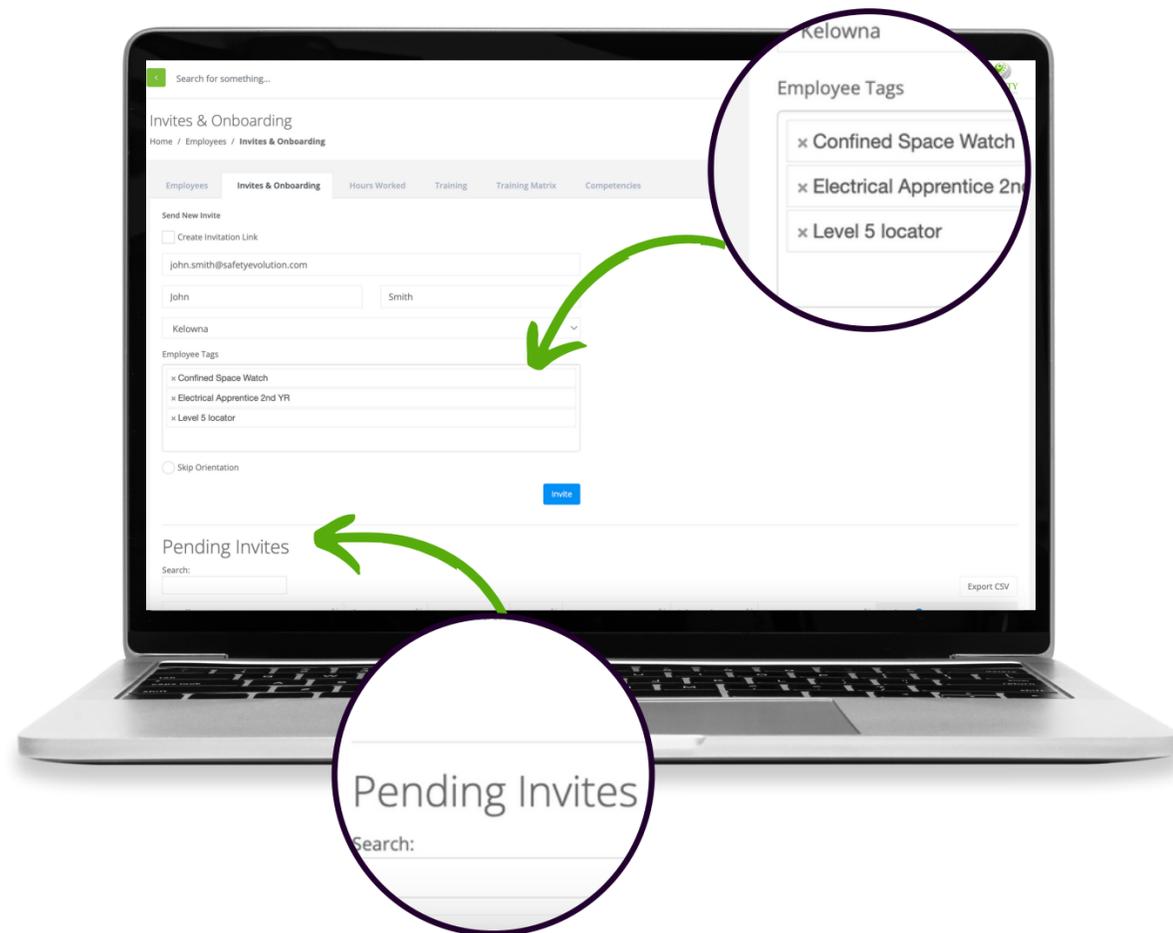


# Invites & Onboarding

3

Invites &  
Onboarding

» Workers Profiles are created with system invite



As employees are invited into the system, **Tags** and **Areas** can be assigned to the employee with the invite to help with extra searchability.

- **Tags** - Ex: Electrical Apprentice 2nd year, First Aid Attendant, Level 5 Locator
  - Company Settings -> Employee Tags
- **Areas** - Create an Area, assign a Manager, assign multiple employees
  - Company Settings -> Areas & Managers
- Chose to **skip Orientation**
  - Employees -> Invites & Onboarding
- **Create Invitation Link** - Use this to create your own custom invite email outside the software. The system will generate a unique link to send to the employee for system onboarding.
- View **Pending Invites** to resend or delete

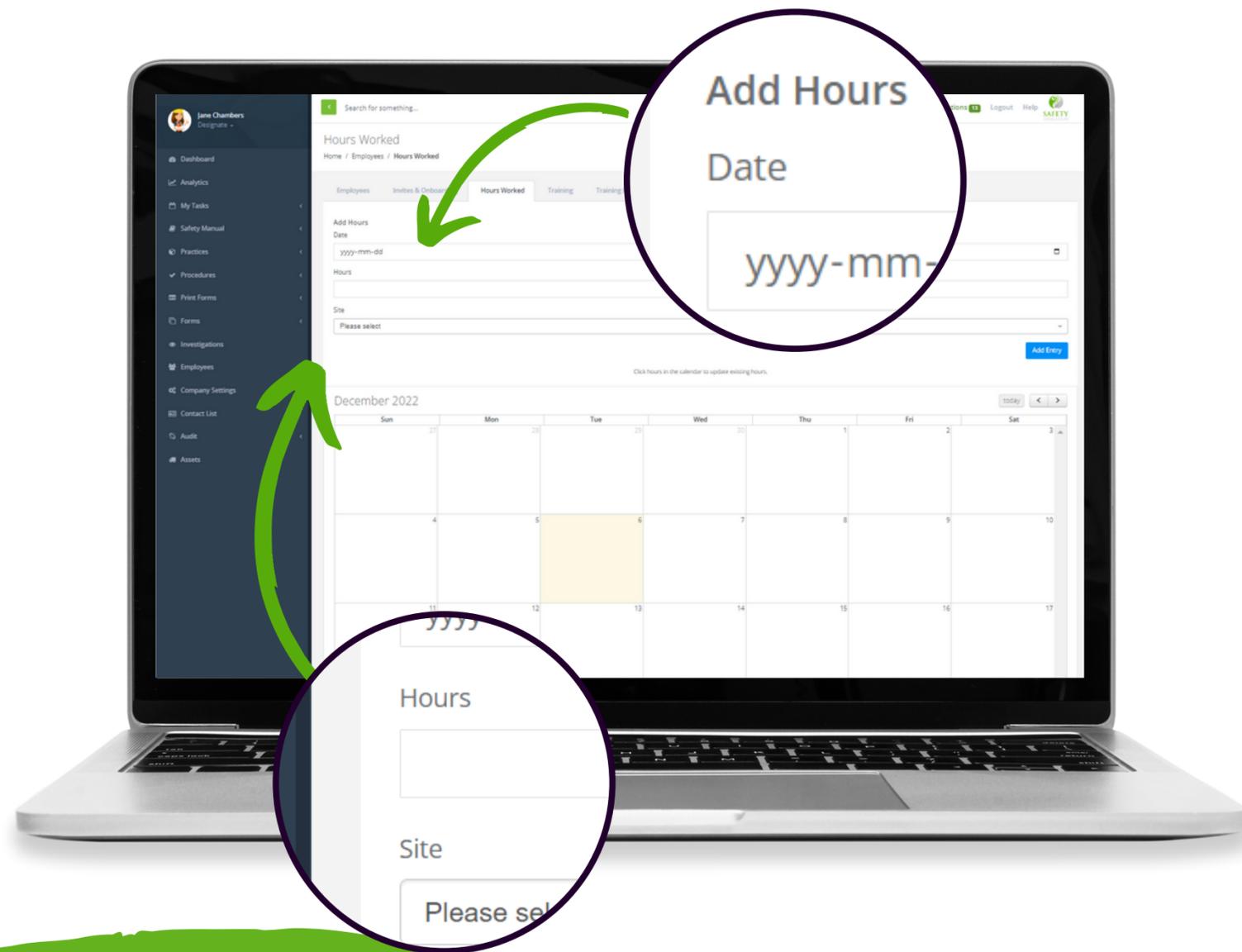


# Hours Worked

4

Hours Worked

» Add Hours to each site for Microsoft Power Bi Analytics



The best practice for adding **Hours** is at the end of each month or payroll cycle, for each site.

The hours will flow to your Microsoft Power-Bi Analytics to keep your **TRIF** and **LTIF** up-to-date, along with the **Incident KPI Report** used for easily accessing information to contractor management systems such as ISNetworld, Avetta, and ComplyWorks.

The Hours worked will also be reflected on your company's main **Dashboard**.



# Training Matrix

5

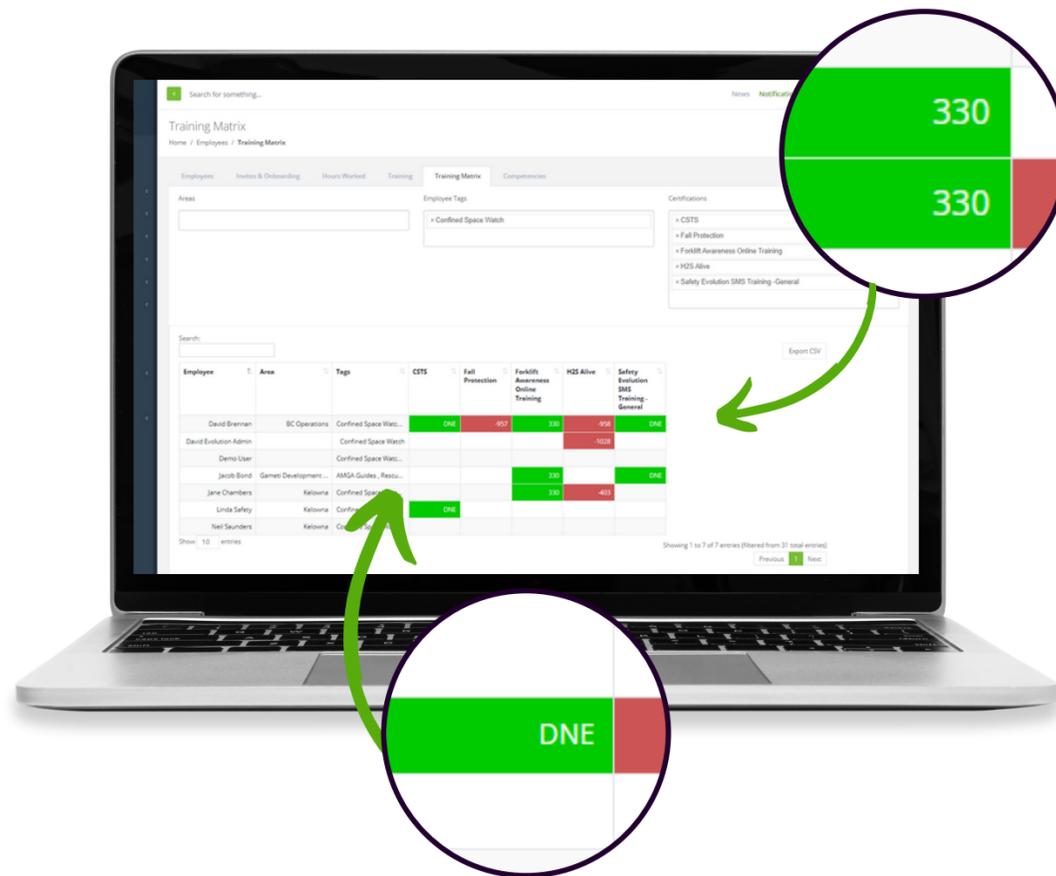
Training Matrix

» Dispatch workers with confidence and get insight into future training needs. 30-day expiry notifications

**Filter** the Training Matrix by Areas, Employee Tags and Certifications to drill down to see what workers to dispatch for jobs and give insight into future training needs. **Export a CSV** as needed of your Training Matrix for projects, contracts and client needs.

Within the Training Matrix, for easy readability:

- **Green = Valid Certificate**
  - A real-time countdown of days till expiry
  - DNE = Does Not Expire
- **Red = Expired Certificate**
  - A real-time countdown of how long it has been expired

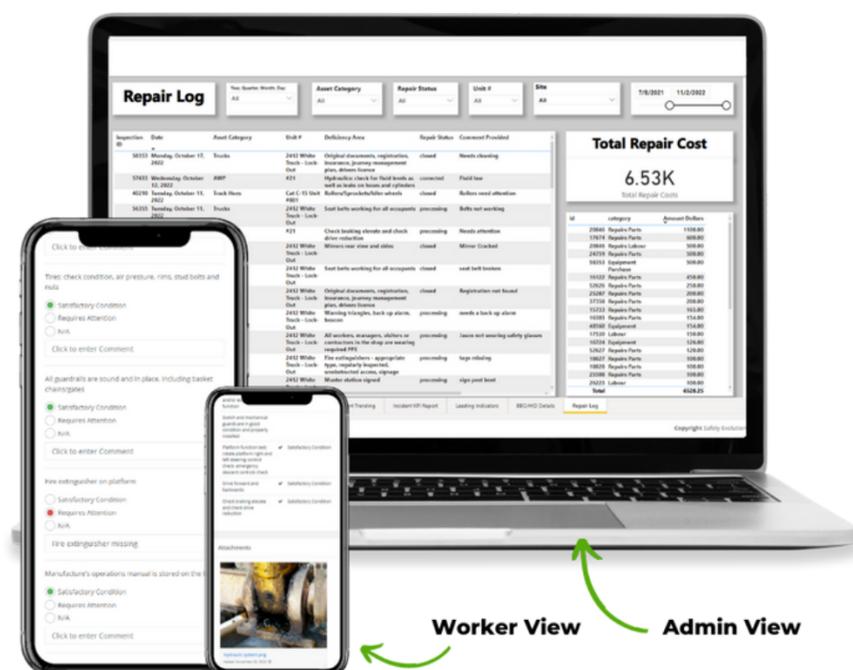


**30-day expiry Notifications** and day-of-expiry Notifications will be sent to Admins and Workers.



# Training Checklist

» 11+ Powerful Features To Assist Your Employee Management



- Create Custom Orientation/Training Course
- Add Quiz to Custom Course
- Set Mandatory Orientation Courses
- Create Onboarding Checklists
- Access Course Library with 3rd Party Training
- Monitor a Workers Course Progress
- Employee Profile for Certificates
- Invites & Onboarding
- Add Hours Worked
- Filter Training Matrix
- Expiry Notifications



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**Other questions?**

[support@safetyevolution.com](mailto:support@safetyevolution.com)