Struggling with Employee and Equipment Certification Tracking?
Learn How Automation Can Simplify Your Training and Compliance Management
Presented by: Dallen Davenport

Thank you so much to those who are joining live or also those who are watching this after the fact, watching it on demand, we are very excited to discuss today a lot of great topics, but also really I think I'm going to spend the majority of my time discussing the platform and showing you some capabilities, features that should be helpful to you and really an I would have imagined save you a lot of time especially because of the topic touching a lot on the struggle with employee certification tracking so we wanna touch a lot on the demonstration of these tools that will help you know how you can actually automate more of the tracking and digitize it. When it comes to your employee certifications, asset certifications, and how those certifications can stay in one single place and be accessed in the back office as well, for those who are working in the field.

So just to kind of kick things off, I'll, I'll maybe share my screen here will get this small PowerPoint started, but I do wanna call out that I. Like I said, the presentation itself with the slide deck will be shorter. We're gonna put a lot more focus today inside of the platform, so stick around to the end. Hopefully, you'll get some great insights and different thoughts and ways and how you can leverage this tool. So we're gonna. We're gonna take a deeper dive on. We're on an educational demonstration today, so maybe it to kind of lead out for those of you who have not met me and don't know me.

My name is Dallen Davenport. I am the marketing director here at Redlist and have been here for probably on my way now to 8 1/2 years, so it's been an awesome ride and my favorite part of all has really been when I get to go and work with people out in the field at the plants at the mines, just really rubbing shoulders and then getting it, you know, being able to jump into your world. So I have had the benefit of working closely with several safety teams and several training teams. This and other teams as well that benefit from the concept of making sure employees are trained compliant and competent. So yeah, I'm excited to really talk about this topic today. It means a lot to me and I really feel like what we'll discuss and show can have a big impact on you. So, uh, the real focus will be touching on, you know, automating your certification tracking and why, right?

If we think about it, there are a lot of things, especially if done manually, that require you as a person to focus on a lot of administrative things, trying to stay as organized as possible. And if done manually, a lot of your efforts in tracking and people are trained or their training is expired, or getting new hires onboarded, a lot of those efforts can really fall apart really fast with a manual system in place. Not to say it's a bad thing if you've been doing that up to this point, kudos to you. You've been, you know, you're doing it. You're doing a good job. We just want to make sure that you're aware of tools that can also take you to that next level.

So a few things really quickly to just to point out is there is some, there's some studies that show that probably per injury, it's gonna cost a company across the board. We're talking at, you know, it could be more specific per industry, but across the board in the industrial space, it's probably about $1100 per injury, just flat out right out of the gate up front. But if it goes further into the meeting, you know, further medical care and having a medical professional that jumps very quickly almost to exponentially higher rates to on average, not your high, not you're low on average to about $41,000. So it can add up really quickly if people are injured in a lot of cases that can come from the workplace or lack of training or you know the combination of the two.

And then obviously the most unfortunate of all, which none of us ever wish upon anybody is, per, you know, the per death cost, which gets up into the millions on average. So these things can really add up from what you would call your hard costs, right? So those are things that really what people hone in on when they're trying to build out a system is trying to make sure they're minimizing those hard costs. But on top of that, you also want to be aware of what you would call your soft costs, which could also just be employee morale. Whenever someone gets hurt or it could be your reputation right and the momentum that you maybe work building with a with a good culture, but then something happens. There are other factors that you could also say impact your cost in in a way so indirectly is probably a better way to put it.

So wanted to lead out with that to say safety training. These things can really help you avoid those hard costs and soft costs. So automating your systems really can help you. As it says here on this slide, focus on the right things and you'll want to work on them. I mean, if you can focus on the right things, it'll help you spend more time and energy on the quality of your training. Maybe not so much. Just checking the box, will also help you with new board onboarding new hires. Helping that process go more smoothly then, also really just again making systems work for you.

We as humans are built to only make so many decisions a day like it's just built into us to function off of so many decisions a day and then we hit a CAP. And so if we can, we wanna build systems that will help us do tracking and also be notified of upcoming trainings. Also, we are part of a huge part is making sure that everything can be found in a single place. And I apologize, I'll say in advance. We have had some wildfires coming through with some smoke from neighboring states, so if I sound funny, that's probably a factor. So anyway, just wanted to put that out there, but I'll say one other thing too. If you have questions, there is a spot for Q&A where you can post questions along this presentation.
You're welcome to chime in, even if it's something that I'm not talking about right now.

At this point, if there's something you're interested in being touched on, happy to do that. If you don't have questions during the presentation, we'll touch on that at the end. OK, so other things, I was just gonna say is really it's important to know that if you can manage tracking and managing certifications and training in one place the documentation is also easy to organize and can also be found in the same place but also accessible to those who are out on the floor, out of the field.

And then also again we just wanna eliminate a lot of the to-dos and decisions that you have to make, let a system worry about those things so that you can put your focus on the bigger things, the quality items. OK. Again, you know this presentation will be short, but I this slide says you know just cutting to the honest truth. The real world can't all be handled and managed behind a computer, right? So This is why we also built a mobile app.

So we're really excited today to show some capabilities that you can do from your computer, but also while you're out in the field as a trainer or as an employee who needs to access your documentation and training, you're gonna be able to know how to do that. And that also has some awesome offline capabilities there as well. OK. So we'll put, we'll ship now over to maybe a larger part of this demonstration. I wanna really hop straight to this. Cut to the chase so that if you have questions throughout the actual presentation of the platform, we can talk about that. So maybe as an outline, I wanna first of all talk through a scenario of me.

Uh, you know, maybe I'm in the office or I'm a safety trainer or manager and I need to, you know, add a sorry certification into the system and it's gonna be for an employee. So I wanna start there. I wanna show you how easy it is to get that set up. Build it in your, build it in the system, and also we're gonna do some building of forms just so you can see some benefits there for documentation and when you're doing your certifications, you can capture that information as you're training people. Yeah, but then we'll kind of move from getting something built and set up to actually being the trainer and performing that training. And we'll do a little bit on the computer side and on the mobile app.

And then after that, we'll actually go and the perspective of just an individual employee to say, OK, as an employee, if I'm going to this job or if I'm on-site, whether it's out of plant, mine or whatever, I can quickly have, I have the ability to pull up my certifications and prove to people that complaint and then we'll talk towards the end about the site, the asset certification site. So again, looking forward to answering any questions along the way or at the very end. But there's a good amount to show, so I've just wanted to hop right to it. So let's go ahead, and I'm gonna go over to the HSE tool.

This is our health, safety, and environmental tool and I'm going to hop over into certification or yeah, certifications. So this area here I can in the tool see really quickly this drop-down tells me I'm looking at a list of all of my certifications that I have at my company and also I can switch views and I could also just look at my employees and very quickly see information about them. How many certifications do they have? Any alerts about maybe trainings that are expired already or that are expiring soon and then I also have a list of my assets so we'll dive in and little deeper here soon. But I'm gonna go back to the list of certifications and in my company, you know, we have some work environments where employees are gonna be working in areas where the air isn't as great of quality, not as much oxygen available to you. Maybe dust in the air. And so they're gonna need respiratory protection training. So I'm just gonna first double-check and make sure I have it. OK, so it says I don't have anything named that at this point, so I do wanna go ahead and make that, but before I do I you don't have to go in this order, but I'm just gonna do it here in this presentation, I actually want to build a few forms that I met a link into this respiratory training.

So there are just a couple of sops. So for those of you who haven't yet built a form, you'll see a little bit of that today. But on top of that, just know that there's a training video that goes way more in detail on how you can build a form. So just know that that's probably a resource to go to. Definitely. If you wanna learn more in-depth about building your forms, I'm probably going a little quicker today on making a few. So I'm just gonna make an SOP here. We're actually just gonna call it umm expiratory could tection training SOP. Very creative. I know. I'm gonna plug that in here. I'm gonna give the just name and title.

The title is just what it shows on the PDF. If you want it to look differently and then in the builder I'm just gonna put in a section here and it just says it's OP details, you can name that whatever you want. Then this first question is I'm gonna actually go ahead and make it a drop-down E and it's gonna pull from a list of employees because I want this form to know which employee I'm gonna be doing the certification with for the training.

So I'm just gonna say employee name and we'll make that required. And that's probably good enough at the moment. So now I'm going to go ahead and I'm going to make another new question. So when I do that a new question appears below. Here I'm also gonna make that a drop down and I'm gonna explain really quickly why. Uh, I why I'm making this other drop down? It's gonna be a certifications drop-down and so. The reason that I have this drop-down is this. This form When I submit it, I need to know what certifications I'm gonna be linking it to, so I have to have a question in here to tell me this is what I'm submitting this form.

This is the training that I'll be kicking off for an employee or refreshing with that employee. Right. Or renewing. So we'll also require that question and then I'm going to axe. OH sorry ask excuse me a few more questions here. I'm gonna add another one below and it's probably just gonna be a simple select button field. I'll make it required as well, and it's we're gonna make option the first option be yes, but let me the other one. No, you can see I can color my button, so I'll do that. And then the question I have it here, I'm just going to copy and paste it in to make it faster.

So the question is going to be. Oops, sorry, maybe it won't be faster. Hang on. All right. So it's going to be employee has completed the required OSHA medical evaluation and it's gonna be a yes or no question. Uh. That's gonna do one other thing really quickly here, we'll say. Just saying that Ployee was last cleared and ordered to complete this evaluation. So I'll just put a little thing here that sends a message and we'll just say we'll do some visibility rule here. He'll say when this question is no, make that warning pop up. Otherwise, we're just going to keep moving on, alright, so I'm gonna make one other question here very, very similarly or one additional question, so we'll say. I have a yes and no. This question is going to ask. Appropriate respirator. Has been selected for the employee. And then we'll probably I'm gonna make this required as well and this is another cool feature in our form builder If I'm like if I need to make another button question just like it, I can copy it, which I will.

I'm just going to rename this one could say fit testing completed and respirator. Provides. Proper seal against. Space. And then I'm gonna do one last question about the checklist. I'll say an employee has completed the training. On how to use clean and store there, yes, E aspirator as well as how to record days' bell functions. Something like that. That is also a yes or no question. And then at the very end, I'll probably just so you can see how it looks, I'll put a little signature question in here that says we sign off on it.

So we'll say trainers signature, we'll make that required as well. And then I'm going to do some quick form settings here. This Gray button. This is essentially me going in and saying which user roles should access it. Actually, that's the one I want. So that's perfect. So now I'm gonna go ahead and hit save. Like I said, there's a lot more you can do with building forms, but learned through this other training video. But today's purpose is just to make a couple of forms really quickly. And I'm actually gonna copy this one because that's just to like get the training kicked off. But I actually wanna do a rest for a Tory protection renewal SOP, which is probably almost the same exact process. This is gonna be slightly different.

Well. Are you up and just making a few tweaks here? I think the main thing I wanna change is. We'll say that the employee has passed the required to follow up so it's a follow-up this time on renewal and you'll see why in a little bit when I build this certification why this makes it why this will make sense because I'm I want documentation to kick it off and then I wanna have another SOP for renewing. So then we'll make another tweak here. Uh, we don't need this question, so I'm going to delete it. Fit testing has been completed. Yeah, I think that's fine. We'll keep that question ploy has completed their training. We'll just say this and I can type employee has completed their refresher training. And then I think that's good. Well, we'll just go ahead and save that form as well. Alright, so we have two forms now. So again, like I said, you can actually build these forms after the fact, and link them to a certification as you create it.

I just wanted to start off with that. So I'm now gonna go ahead and create that respiratory protection training. I'm gonna go to HSE, click certifications, and then I'm going to go here and get plus and we'll call it respiratory protection training and this is going to be a, an A training for employees, right? So the type I'm gonna select it as employees, the issuer. This is probably just saying, you know who is who is regulating this or who may be providing this training. So somebody from OSHA or maybe internally they represent OSHA. And then you also can pick, you know which roles like which roles should be getting this training as well. I'm actually going to leave this one blank because I'm gonna show a little later how you can actually assign this training to the app at a bulk scale to many different employee roles. You can also mark down if you have clients who require this training.

You can actually Markdown which clients it is, or if you have job site locations that you specifically need this training for, you can do that and then just a quick description on this certification, we'll just say required for workers. Well, maybe exposed to dust gases or insufficient oxygen. Something like that. Alright, so the next step so we've put some additional some additional details down on what the certification should be called, who issues it, maybe who has access to it and now we're actually gonna set up some steps here of what should happen when I first and kicking this certification off with an employee as a trainer and then should this certification renew and if so, how should that work as well? So this first section at the top is when I'm first kicking off a cert.

So you'll see here I have a bubble, two bubbles, and this one just says hey, as soon as you, you know, this certification will automatically become valid for your employee the minute or the day you add it to their they're employee profile. In this case, we're not gonna do that. Some certifications make sense too. In this case, I'm going to actually select the forms needed to certify so that effectively you can require a trainer to document some more information other than just saying I did the training so the forms as you know, I just built some, so I'm gonna go here and say. I am going to search for respiratory protection.

Not the renewal, but the first one and I am going to make it required in order to kick off this cert for an employee. So that's something I'm gonna put here. So basically an ish in order to initially get that going and have somebody trained out of the get out of the gate out of require this form. So another question now is, does this form need to? Does that need recertification? Does it need to be renewed? And the answer is yes. In this case, it's gonna be early, so I'm gonna say every year and then also I can base it off of the due date of saying make it a year from the due date or from the last expiration date.

I'm just gonna keep it here on the due date, but I will say as well very soon. We are gonna have some other settings coming that make it to where it's just like make it at the end of the month, right? OK, so now that's gonna be yearly. And I'm also going to specify that I do want another form to be completed and it's the protection renewal SOP, right? So hang on, I think I just erased something. There we go. Oh hit required. So you'll notice here that this form to get it started is different than the form that I'm going to use for following renewals. So you'll see what I mean when I, when we actually switch hats and become the trainer.

At this moment I'm just playing the role of hey, we need to add another training into our slew of certifications that our company. So I'm building this out right now. Now here is something that I really love, because when it comes to automating this tool, you're actually doing the work right now to say, OK, instead of me having to look at a spreadsheet or pull through some filing cabinet and wonder who's due in the month of February or whatever, I'm setting this up right now to be on a schedule so that I can go ahead and and say on the schedule I, I, I need a notification sent to the right people for when somebody's certification is first assigned and also before expiration.

So in this case, I'm gonna say. Uh, for the safety manager, that's the person who I want to be notified and let's send that notification. Let's give them an ample amount of time like a notification should go to this manager 45 days before that annual refresher needs to happen for your respiratory protection training. So you're setting up some really automated tools right now that will be beneficial so that a manager can just get notified and say, OK, I'm gonna get ready and plan this out. Well, you can also which I think I would recommend I prefer this is I toggle this to include employees in the notification setting as well.

This is so that not only the manager is aware, but the employee also is told, Hey, you gotta renew this training helps everybody just be on the same page and know what to expect in the upcoming days. There's another piece here that I'll talk about a little more in detail in a bit where you can also, you know we have a tool called work boards. You can manage tasks and maybe have more project management and you can incorporate some project management into tracking the status of upcoming trainings and checking the you know to complete those. So you can actually have some workflows that also create some tasks for your team.

OK, so I'm gonna just go ahead now and create this certification. But I also want to just check and make sure that no one has added any questions in the Q&A yet. OK, not yet. So we're good. Just wanted to double-check. OK, so now this training has been created. So there are a few other things I can point out now about this respiratory protection training. Which over here. Now that I have selected it, it tells me that it's employee training and it's on an annual basis as what it should be valid for. There's a little description here telling me what the purpose is of that type of training and then over on the right side, I have some tabs here telling me which employees have been added.

This is the selected tab so you can see I don't have anybody in there at the moment, which is OK, we'll go. We'll cover that in just a second and then the Rules tab just tell me how this certification, what's the automation and how have those rules been set up for the certification. So it's telling it's telling me that I have turned on the certification rules. There's some explanation that tells me that. Good. You know this needs to be renewed every year from the certification date and I also need to notify the manager 45 days and the employee 45 days before the expiration expires and also when the employee is first assigned. So now another thing too is we have this section called files. So files.

What I really like about this area of the tool is this is for the certification, like the training itself. So let's pretend I'm gonna be doing a classroom training and I want to always have a PowerPoint slide that I use every time and maybe a video. This is where you can store and say what files you wanna keep and put in here for your training so that next time this training needs to happen, you can pull this. You can go to this files tab and you can pull up and watch that video with the person and then you can also pull up that PowerPoint slide and review those items with them as a follow-up.

So that's just something that we have found trainers and safety managers really benefit from again, it's not having to go now to another drive or some other software to store these files. You can just put them all in the same place, OK? And then another thing to point out is if maybe I set something up that I didn't like that I needed to change, we can always hit this edit button and you can adjust the game plan of how this certification should work. OK, now we're gonna move to assigning employees to the certification. There are a few ways in how you can do this, so I want to make sure you're aware of all of these ways.

1st way is I can just pick an individual person so I can go here and say had employee I've got my employee list. Here I'm just gonna pick Dallen Davenport myself. And Walla Dallen has been added. So right now it just shows down in the list. It doesn't show there has really been issued yet. It's just me saying Dallen should have this training and so his training is missing because he hasn't completed it yet, which is good for me to know and have that status. And you can also see that I can also get that training done and certify it. I'll get there in a minute, but the other thing I want to point out is I just wanna show this. I have this email here that just told me that I am Dallen.

So it actually told me I've been assigned to this training. A manager can also be aware of that as well, but it's just good people are being aware of what they're being added to, and it just again, it's working on your behalf. It's taking a lot of those extra actions that you probably might be doing if you're doing it manually today. And then the 2nd way that I can add someone or many people to training is I have some settings down here and it's probably permission-based. So if you don't see this button, you either may have to scroll like I'm doing to find it, or you may just not have the permissions for it.

But I'm gonna click settings and it's gonna be employee roles and these settings here are actually really good in a situation where for onboarding it may be that you can set up ahead of time. Hey, this role needs to have all of these certifications so that whenever I hire somebody, for example, as a crane operator, I can see who right now are all added as crane operators. And then I can also see what certifications the crane operator role has at the moment. This is the NCO certification. One other example, just to show that I may have a mechanic and a mechanic, it looks like the mechanic has a lot of training here that should be done when someone is hired on as a mechanic.

So I can just preset ahead of time what those trainings should be, so I don't have to manually add stuff one by one and go through a lot of rework and then I can see which employees right now. Uh, our mechanics. So down in Ray and some Julie, all have these should have these trainings assigned to them. It doesn't mean that they're completed, but it just means that they're on their todos to make sure that they get that they do get trained on those themes and that they are current on those trainings. So feel free to take a look at that and play with it, but you can see in some situations you can also use roles as you level people up to greater and more complex skill sets. You can set up what those additional trainings should be for a level one versus a level 2, and so on and so forth.

It's a great feature, so I'm gonna go ahead and. I'm gonna for this crane operator. One, I'm just gonna. I'm gonna select this rule. I think I'm going to actually go search for that. Respiratory respiratory protection training and I'm going to add it to this role. And then it's going to tell me that adding the certification to this role will also add this certification to all employees currently assigned to this role. And I'm only doing 1 right now, but if you've found like 10 certs that need to go with it, that's great. You can pick them all at the same time and do a bulk ad and it doesn't. You don't only have to do this with one role, you can also say yeah, also those who are the maintenance techs and lubrication text.

They also need that training go ahead and. At that here as well. Awesome. OK, so. This role has a lot of other people here, so I'm going to. I should expect it now when I return to HSE and my certifications tool. I searched that respiratory training and selected it I should expect to see employees loading in here now. OK, there we go. Gotta a healthy list all of them are showing as the missing status. That's fine, and maybe it looks like we have some extra people. I don't need it, so I'm just going to. I can remove them from here. Just say I don't need them here. Let's get rid of these two as well. Just clean it up. There we go. So these are the ones I want.

Alright, so we've now gone ahead and set up the certification and we've also picked the employees that should be required to be trained, on this training. And so I'm gonna explain a little bit here now on this table of some things that are going on. As you can see I have a search bar. This allows me to search for information in the table because this list could get really big right? We only see five people right now, but it could probably turn into hundreds. That's very common. As you can see here I have the employee's name here. This will tell me once the training is complete when it was issued, when it expires next, and then the status.

I also, for those of you who are also kind of used to Excel filtering, that we also have some sort button and a filter button so that if this list does get big, you could say show me only those who have a status as missing. Right? So just helping you really quickly get to know what you got out of what you gotta do. So I'm a trainer and I'm first gonna show you how to kick off a training here on the computer and then I'm going to show you, like I said, not everything can be done behind the computer in the real world. So I'm going to show you how you can do it on a mobile app, so let's go ahead and click this certify button. It's gonna populate some dates in here because this is the day I'm doing the training and then it's gonna tell me, umm, when it'll expire next.

I think I need to just update some settings here for it to be 2024, but here I can't go ahead and just hit certify. I can't just make it happen, I actually need to go ahead and complete this form that we built. So we're gonna load up this form and fill out those questions. What's nice too is the certifications tool. I already know what employee I've opened this up for and what training it is, so it just fills that out for me. Pretty slick, and then I'm gonna go here and say the employee has completed medical evaluation. Like I said, if I put no it must.

It's gonna probably give me a warning in this case. I'm gonna just say yes. I'm gonna enter an appropriate respirator. Yes, fit testing is completed. Yes. So I'm just making sure that the soap is good and then I'm gonna sign off my awesome signature hit sign. Go ahead and hit submit and once this is submitted, this is gonna be stored on that employee's profile and on this certification record. Also, let's pretend that the certification was done by a third party and that maybe they have some files that I need to upload. So I'm gonna just go ahead and put that in here as well. So I'm just gonna attach that certification and now I can hit certify and as soon as I hit certified, you can see that it's gonna show that I'm no longer showing as missing again.

Like I said, I probably need to update some settings here, but this should just say valid, and then if I want to look at the history I can open up my profile for this employee and I can actually look at the files that were attached be like Yep, this was the cert that was completed and I can also look at the activity here of when it was assigned to Dallen when that form was submitted. I can even pull up that form. It's all in one place. I don't have to go anywhere else I can find this history on this activity log and I can see what was filled out and that it was documented properly it also has some documents stored here just if I want to access the files separately this on this area you'll also notice too that it says expire soon.

So you know, if something does come up as needing to be renewed soon, I can, I can renew that on the mobile app and that's what I wanna switch over to right now. So I'm gonna go ahead. And I'm gonna start sharing my screen. We're going to hop into it. The mobile app. OK, so here we are. We are now in the mobile app and I'm so just on the computer was wearing the hat as the trainer and I'm still wearing that hat. I just wanted to show you how you can go out in the field now to do the same exact thing. So I'm gonna. I'm actually going to renew this respiratory training search for that employee Dallen.

So I'm gonna go ahead and complete that. So you'll see here I have a tool in my list of my toolbox called certifications. This is a permission as well, by the way. If you don't have this permission to be a trainer and have access to all the employee certifications, this will disappear from your mobile app. But I'll talk about this in a minute. You will only. You'll still be able to see your own certs and documentation, but without the permission to be a trainer, you won't be able to see anybody else's, so that's just something that I wanted to call out. Out.

So I'm going to tap certifications because I'm the trainer and I'm gonna go find Dallen because I need to help him renew. Excuse me. I'm gonna. I need to help him renew some training here. There we go. OK, so these are all the training that Dallen has? You'll see going down. There's that respiratory protection training says it's expiring soon there, so I'm gonna tap on it. Then you could also see I have that attached file. If I wanted to, I could review and be like, oh, cool. There's the document there, so this tells me that it was issued on the 30th. Looks like that might have been off a little bit, but then it says it expires September 29th. So I'm now gonna go ahead and hit read.

I'm going to hit this Renew button and I'll say this as well. I'm offline or I'm online right now, but if I'm offline I can still do this, it'll just save everything on your device, and then when you open it again when you have a connection it will it'll sync. OK, so here we have umm you know it shows me some details here. I'm going to say I want to. Oops. Do you want to hit renew? Looks like maybe it didn't load that new form. I did. So we'll just pick it. And then we're gonna go. Here's the form. You can go answer these questions. Go down the line. I'm gonna hit the sign. Submit. Then now that that form is there and that has been submitted hit renew and it's now going to.

Save that form submission as documentation and it's gonna refresh that training. So that's just a really quick way to show how on the mobile app. Somebody can quickly look up and employees go find them wherever they are. Maybe they're out on a line or in the middle of a pit or underground or whatever, or and a wind farm. Wherever you are, you can still take your phone and pull up this information, and then you can go look at it later and review it or send it if you need. Uh, I also if I need to, I can hit this plus button on the top right corner and it's got it can let me take another picture of something or upload a different document so that way just like how I had this attachment here I can I can load that there.

OK, so now. That that really I mean covers one example. Maybe I'll just show another one here. So I'll just say there's this boiler lockout tag-out procedure. If I hit renew, you'll see it here. I can't that I can't renew until I fill out this E audit form. Say it's for this facility. Their signature is here. Ployee signature as well. Strange that looked a lot alike. And then I'll hit submit. So now that's pushing pending that submission and I can hit renew. Then that gets renewed. So just so you can see like that's really the process here, you can go through, OK, so uh before I continue, I just wanted to kind of talk about the clothes of the employee side here.

So we've really just talked mostly about employee certifications and how somebody can go ahead and manage it from your mobile app as well as from the computer. And it all syncs back to the same place. And again, these are the notifications. Those are really key in helping you know what's upcoming. So that's just in my opinion, you know, a huge part of our lives today. I think a lot of my life is running. I don't know what I'm doing next until my calendar pops up and says this is what you gotta do.

I know that's probably shallow of my brain, but it's my prosthetic brain, you know, text messages, phone calls, people. These types of things really help me know what I need to do next, and so having that automated is super key, but also shortening the amount of time off like when should this get done? It really just gets managed on an automated schedule there and then lastly, having everything found in one place is really key. So I guess what I want also show and shift into here because I went really deep on the employee side. I wanna just show the proof you know, from the purview of the trainer about the asset side of things, or anyone who's over the equipment side, how they can find out what those trainings are as well.

So a few things to point out is I have this employee list I'm looking at in the mobile app, but I also have this asset list. So this asset list can also be a place where I can look up what certifications this asset has on it. So this is actually it annual crane certification. It looks like and you can see that there's, you know, the details. I can look at it. It's not a, it's not expiring yet, but it expires soon and then uh, so I can look up any asset I could do a search, find it. See what the status is it's on its certifications here from this certifications tool I can also go to this certifications list just like I can on the computer view and I can say I want to look at it.

I wanna there's this little filter button to the right of the search bar and tap it. I wanna. I wanna look up any certifications that are asset-related. So now I've got all these certs here that are for my different assets. So you can see here these are all the assets right now that have this annual crane certification. This is a crusher warranty for all my crushers. I'm at a mine. Probably there's a tank certification doesn't look like I have anything there. Umm for your semi-registration so you can do this for registrations, and insurance as well. So really just a quick way to find everything on the mobile app.

However, let's say I'm not a trainer, but I still need to see what you know the certs are on an asset I'm going to tap tools on the bottom right corner and probably most people are gonna have access to the asset list, so they could probably tap into this asset here and they can see there's a button called certifications as well where they could go and look up the trainings. Or sorry the certifications that this asset has so the mobile app is very powerful because you obviously can find inspection history, and job history details on the components that that asset has or what tasks it needs for maintenance-related needs.

But it also includes certifications, so that's a really key thing to point out that I just want to make sure that your team is aware of in case that ever needs to be an important thing. And on the one last thing on the mobile app, which I apologize, I glossed over is let's pretend you know you're at a job site or you're working at, you know the plant and somebody says, hey, are you current on such and such training on this confined space training right or whatever? Here you have the ability from the mobile app to pull up your profile and say Sure, let me show it to you and. And so you could so you could share information on asset certs or for yourself on the top right corner.

These are my initials. Where it says DD I'm gonna tap it and I'm gonna tap view profile and there's a button here called certifications. So this is my personal view to say, yeah, these are my training. What do you wanna know? Right. They can say, well, I wanna see if you are good at your project. Respiratory protection training. You're like, yeah, for sure. Let me show it. You can show this to him. You can even say if you'd like. I'll even send you the form. Do you want me to send it to you? So you can open the form it share it. Coulda shares it with or you could even close it and say yeah, I'll send you the document. This is, I've got it.

Whatever you need, right and you can send that to the person via text from your mobile app or to an email. It just really changes the game I can't tell you how often I've seen whether it's been an audit. Someone been like I don't have my stuff on me or someone shows up at a guard shack gate and they're like Show me your certs and you're like I don't have them that go home. Go, go, go back and get them. So it's just great to save time and hassle. Another thing that makes it more automated, it's just because you're already doing the work of completing these trainings, tracking them, and renewing them.

The employee just has it in their pocket. It's there. They can do whatever they need to with it, so that's something that I've found to be, you know, a big help in making sure that a system is doing the work for you and that you don't have to think and make extra decisions to say, oh, did I send that with the person or I didn't put that in their cabs. So I think we're done with it, right? So you can just make sure that you're doing it in one place so that it's also accessible to those who are out. OK.

And then just again, uh, kind of showing back here on the web application. You could also see that like I said, very similar. Oh let me reshare, I apologize. I thought I was sharing. Here we go. So just like on the mobile app, you can see you have your asset list, and you can see what training those have. You can do everything you need as well in the same you know same as the mobile app and and updating. Uh, great. And renewing those certs a lot of times though what I wanna call out, that's a little different is if I go. To edit a certification in this case I'm gonna open up the annual certification training.

Annual crane cert. I wanna go and see how it's set up. So I'm going to click edit. And inside of that, I am going to check out. Umm, like so I'm gonna check out how it is set up so it is set up to renew your annual. This is the manager who's supposed to be notified, but this is the thing I mentioned a little earlier about generating tasks that I think is important to call out because for assets, especially for certifying things, sometimes you can get away with having a resource that is doing your inspections on your, on your equipment. But typically, you're gonna be you're gonna be hiring it out to a third party.

And so this is where the generating task piece comes in, where in some sense your project you can project manage work that you can't do yourself for conflicts of interest reasons, but that you can. But you can create tasks and say ohh when is this? This is when a crane, forklift, or whatever I needed to be certified is coming due for its training for it, not training. I apologize for its search it's an annual inspection that generates a task on a board that I can manage and then I can start collaborating with my contractor maybe they are also looped in on this notification setting so they get notified, but you also have a task and then you can start calling them up and say hey, this month I have these 50 trailers that need to be inspected or these 20 lift trucks or these ten cranes or overhead cranes, whatever, whatever mobile or overhead.

So this is a great way for you to say yes, generate a task and I also want it to be generated when it's first assigned or right before it expires. And I wanted to go to this board. We can create and then have the task generated. It looks like 30 days before expiration, so I won't actually change anything, but I wanna show this so that you can see that we have some. We have one of these assets that is expiring soon, so I'm gonna go to by HSE tool. I'm going to look at my Safety Board. Could be safety. You could put it elsewhere, but my HSE board right now does show that I have a crane inspection for this asset that's due.

So this could be 20 cranes or whatever assets you're managing can show up in this area. So I just wanted to show that so that you could see that maybe start thinking being like ohh maybe I could change this to be more project-based where I actually have kind of an open work order and task to mark off and say Yep, the third party contractor did complete that inspection for me and you have a way of just tracking that as well and it can. And again it's auto-generating this. It can feed it into this board. You can move it along through the process, so I know I've shown quite a bit, but I feel like this is super critical to understand, especially if maybe you're using this tool now or you're still working in kind of the spreadsheet world.

Or maybe the Dark Ages with some parchment and feather pen. Wait, I, you know, just depending on where you are. Either way, these features are really to help you automate your processes. So I hope that you got something out of this today and that I hope that maybe one of these things, you know, maybe helped, you know, where you could sharpen your skill sets a little more and make pulling everything together in one place and in a more automated fashion. So I'm going to maybe just hop now to the end here and thank you all for this time and maybe leave the rest of the portion to any questions that you may have.

If you have any. Shout out to Bryce. He was saying this is thanks a bunch down. This is one of the parts of Redlist I'm very interested in using. Very informative. Thank you so much, Bryce. I really appreciate it. They did get another question that said, What do I do when it comes to moving historical information into a system like Redlist? That's a great question. So I would say that if you are using something else, just know that our team is really good at helping. The word is migrated if you have PDFs or pictures we can help you move those initially into the right place.

But also it can be very straightforward. Uh, we have some importing capabilities on some things, and also we can get whoever you're if you have a customer success manager here red list working with you they can take you through some steps and our team can help support you through just saying OK I have files that I need to move in or I have my list of employees that I need to move in these things can be kind of dropped in and chunks and can actually be a pretty smooth process I've seen I've seen it on all the right information is there I've seen it dialed in within a week pretty fast. Uh. Got one more question here.

Do you recommend having forms on every certification? Not necessarily. I think it's just if you want that additional check-off for compliance, I think that you're welcome to build a format. I personally don't know if it's a recommendation, but I personally think that there are just some certs that you probably have just added and that never need to be renewed, and that's OK you can just upload your files to it then. But if you want more of a process and an SOP to be followed, I think it would be good to explore building some forms there as well. All right.

Well, that about wraps it up for us. Thank you to all for your questions and participation will distribute this out so that you can watch this on demand as well and stay tuned for our next webinar that we'll be having next week as well with some additional training from Trevor Shaffer. And we'll see you next time. Thanks so much.