

Employees

the roster that connects people to the work

How to build and maintain a site's employee roster - the list every other module draws on to assign work, record training, and tie an incident to a person.

Version 1.0

Admin Guide · for administrators

Screens captured July 2026

ShieldSphere's Employees module is a site's roster - the single list of workers the rest of the platform reaches into whenever it needs a name. Keeping it current is what lets you assign a corrective action to a person, record whose respirator fit test is due, name the injured worker on an OSHA 301, and pull an employee's whole safety history in one click.

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1 What the Employees module does

Employees is the site's roster - the single list of people that the rest of ShieldSphere reaches into whenever it needs a name.

It is quiet infrastructure with a large reach. The roster you keep here is what lets you assign a corrective action to a person, record whose respirator fit test is due, name the injured worker on an OSHA 301, and pull an employee's whole safety history in one click. Keep it current and every other module gets easier; let it drift and assignments start pointing at people who left.

EMPLOYEES VS TEAM

The **Employees** roster is the workers at a site - the people safety work is about. It is different from **Team**, which is the ShieldSphere user accounts that can log in and manage the program. A forklift operator is an employee; a safety manager with a login is a team member.

2 The roster

Click **Employees** in the sidebar. The roster lists everyone at the current site, with four status tiles across the top - total, active, inactive, terminated.

TSG

TSO Safety

OWNER

Signed in as Matt Thompson

Organization Overview

CURRENT PROFILE

Demo Company

WORKSPACE

Site Overview

Compliance

AI Hazard Scanner

AI Job Hazard Analysis

AI Ergonomic Evaluation

Inspect

Incidents

SDS

ZeroState

Assets

Policies

Toolbox Talks

Trends

Employees

Profile Settings

ACCOUNT

Log out

Employees

Roster for Demo Company. Click any employee to view their full activity history.

Import roster

Add employee

Total

5

Active

5

Inactive

0

Terminated

0

Roster

Search name, employee ID, email...

Active

Name	Employee ID	Email	Department	Title	Hired	Status	Actions
Derek Calloway	EMP-003	d.calloway@democompany.com	Maintenance	Maintenance Technician	Nov 9, 2019	Active	
James Harrington	EMP-001	j.harrington@democompany.com	Production	Machine Operator	Mar 14, 2021	Active	
Maria Santos	EMP-002	m.santos@democompany.com	Warehouse	Forklift Operator	May 31, 2020	Active	
Rachel Nguyen	EMP-004	r.nguyen@democompany.com	Quality Control	QC Inspector	Jan 16, 2022	Active	
Tom Westbrook	EMP-005	t.westbrook@democompany.com	Safety	Safety Coordinator	Aug 21, 2018	Active	

The roster. Name, employee ID, email, department, title, hire date and status per person. Search by name, ID or email, and filter by status. The buttons top-right are **Import roster** and **Add employee**.

3 Add and import employees

Employees → **Add employee** or **Import roster**

ACTION	WHEN TO USE IT
Add employee	One person at a time - enter their name, employee ID, email, department, title and hire date.
Import roster	A whole team at once - bring an existing employee list in rather than typing each row. The fast way to stand up a new site.

EMAIL IS WHAT UNLOCKS THE NO-LOGIN FEATURES

An employee's email is how ShieldSphere sends them a corrective-action completion link or a training reminder without them needing an account. Capture it now and the field-facing workflows in other modules just work.

4 An employee's activity history

Click any row to open that employee's record and see their **full activity history** - the training on file, the incidents they were involved in, the corrective actions assigned to them, and more, gathered from across the modules.

ONE PERSON, ONE STORY

This is the view to open before a performance conversation, a return-to-work discussion, or an audit question about a specific worker - everything ShieldSphere knows about that person's safety record, in one place.

5 Statuses and good housekeeping

Each employee carries a status - **Active**, **Inactive**, or **Terminated** - shown in the tiles at the top and filterable in the roster.

- **Keep leavers accurate.** Mark someone terminated rather than deleting them - it keeps their historical records intact for audits while removing them from the pool of people you can assign new work to.
- **Fix departments and titles when people move.** Reporting and assignment lean on these fields; a stale title sends the right task to the wrong context.

6 Troubleshooting

SYMPTOM	CAUSE AND FIX
An employee is missing from a dropdown in another module	They are not on this site's roster, or are marked inactive/terminated. Add them, or set them active.
Reminders and links are not reaching someone	Their email is missing or wrong on the roster. Edit the record and add a valid address.
A former employee still gets assigned work	Mark them Terminated - do not delete them, so their history survives.
I have a long list to enter	Use Import roster instead of adding one at a time.
The roster looks wrong	Confirm the current profile in the sidebar - the roster is per site.