SHIELDSPHERE

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.

ADMIN GUIDE – FOR ADMINISTRATORS | VERSION 1.0 | SCREENS CAPTURED JULY 2026

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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.

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.

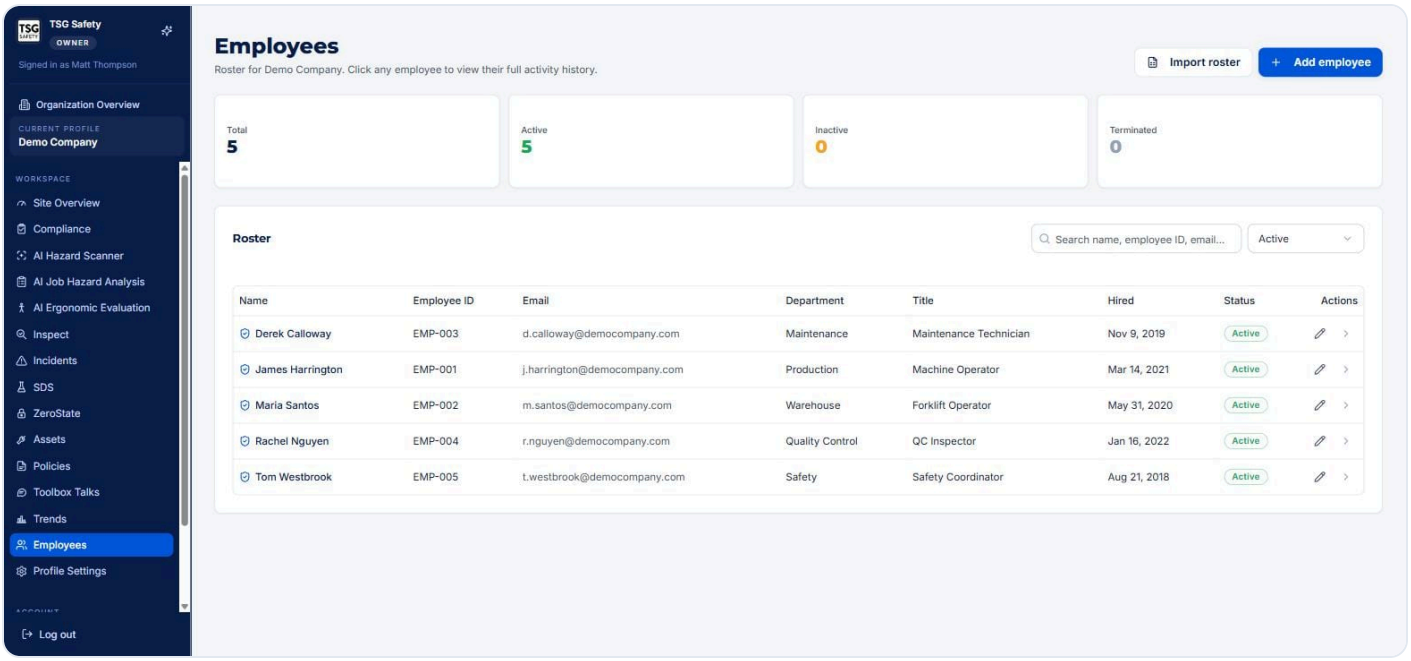
It is quiet infrastructure with a large reach. The roster you keep here is what lets you assign a corrective action to a person, record whose respirator fit test is due, name the injured worker on an OSHA 301, and pull an employee's whole safety history in one click. Keep it current and every other module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



> **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.

A PAYROLL EXPORT USUALLY SAYS "LAST, FIRST" - THE IMPORT ASKS BEFORE IT FLIPS IT

Most payroll and HRIS exports write names as *Doe, John*, while everything that matches a person later - training sign-in above all - expects *John Doe*. The import wizard detects the convention across the whole file and asks whether to convert, showing you what it will do first, because an inverted roster is hard to spot and annoying to undo.

It decides per file rather than per row, so a roster never comes out half one way and half the other, and it never guesses where a surname begins: *van der Berg, Jan* becomes *Jan van der Berg*, and a suffix stays with the surname. Rows it cannot read unambiguously are left exactly as they are and shown to you.

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.

illustrative; the written steps are what to follow if the two ever disagree.