SHIELDSPHERE

Inspect

administrator setup & configuration

How to build checklist templates, schedule recurring inspections, manage location presets, and set report defaults - everything needed to configure Inspect for your team.

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

WHAT'S IN THIS GUIDE

1 Build checklist templates

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5 Troubleshooting

Administrators configure ShieldSphere's Inspect module before a team runs inspections: build and publish checklist templates, set recurring inspection schedules so they generate automatically, save location presets, and set report defaults. A checklist must exist and be published before anyone can run it. Running inspections is covered in the Inspect User Guide.

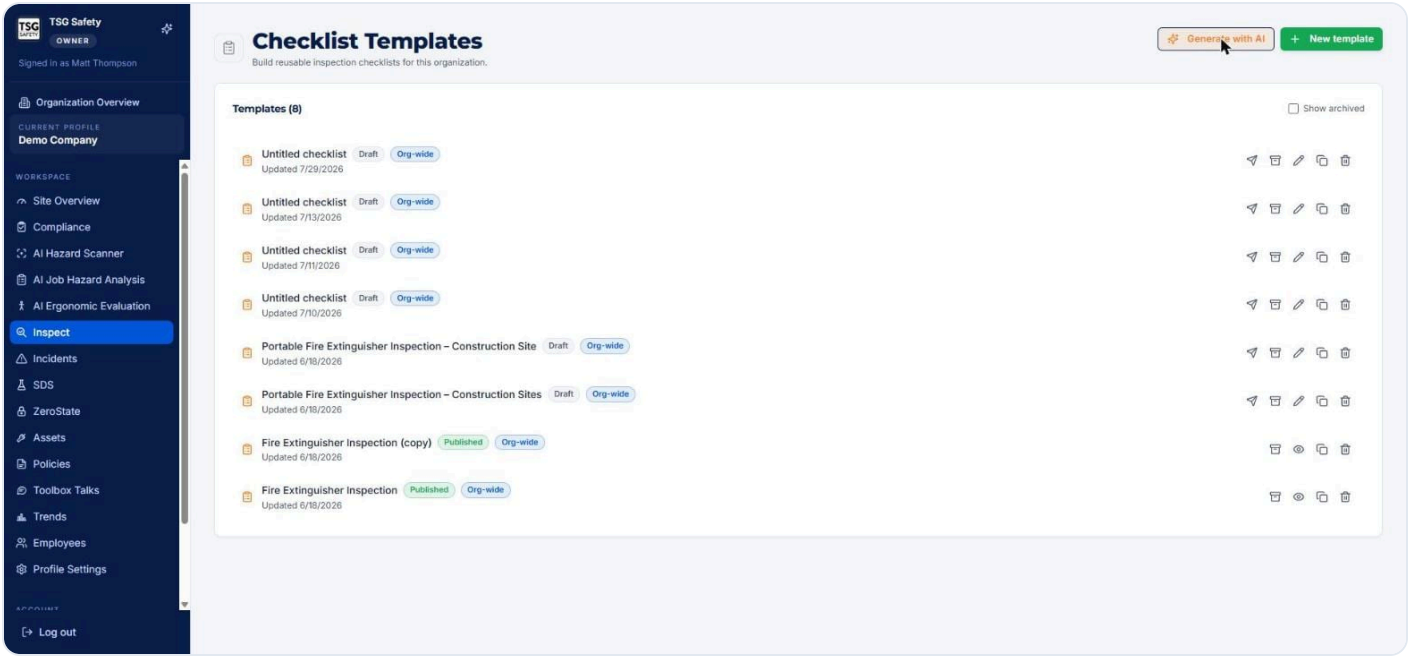
START HERE

This Administrator Guide covers only what you set up to make Inspect work for your team - checklist templates, recurring schedules, location presets, and report defaults. For running inspections, reviewing findings, and working corrective actions to closure, see the companion **ShieldSphere Inspect User Guide**.

1 Build checklist templates

A checklist has to exist and be published before anyone can run it. This is where that happens.

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Inspect → Checklists (top right)
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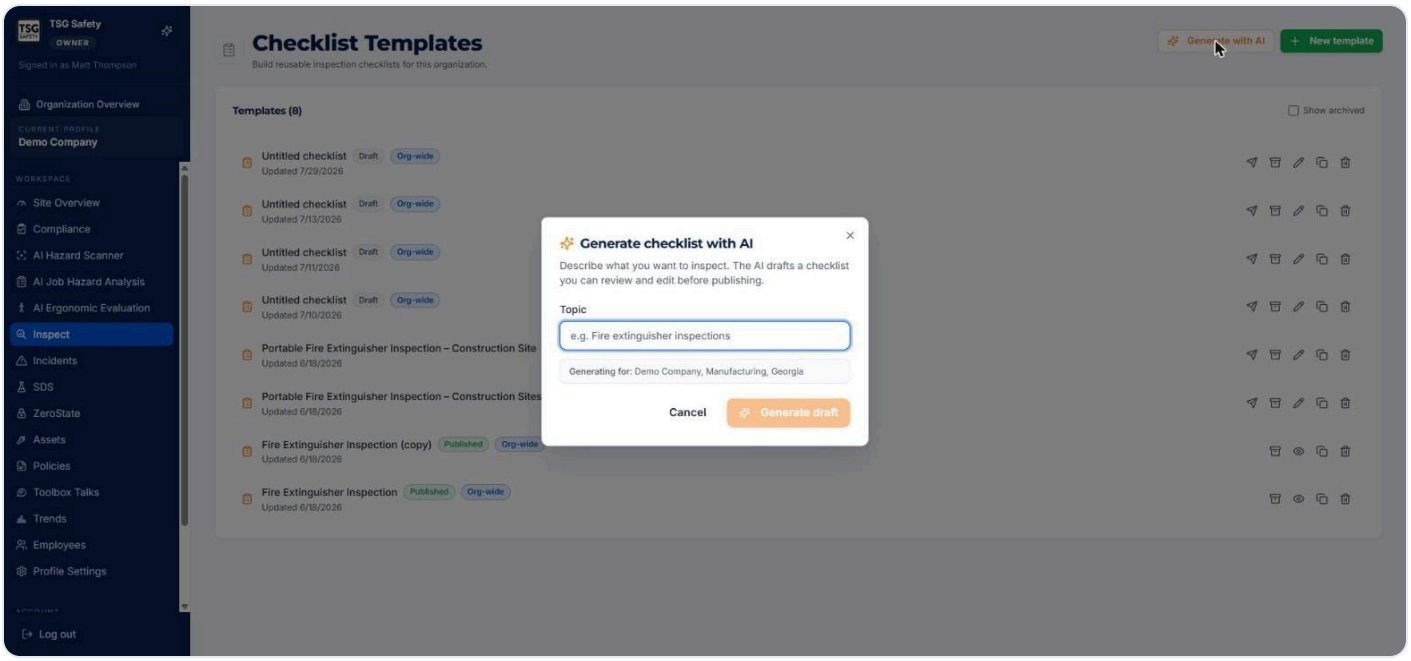
> **Template library.** Each template carries a status badge (**Draft** or **Published**) and an availability badge (**Org-wide** or site-only).

The row icons

Send	Assign the checklist out to be run.
Archive	Retire a template without deleting its history. Tick **Show archived** to see them again.
Pencil	Edit - drafts only. Published templates show an **eye** (view) instead.
Duplicate	Clone it. This is how you change a published template: clone, edit the copy, publish, archive the old one.
Trash	Delete permanently.

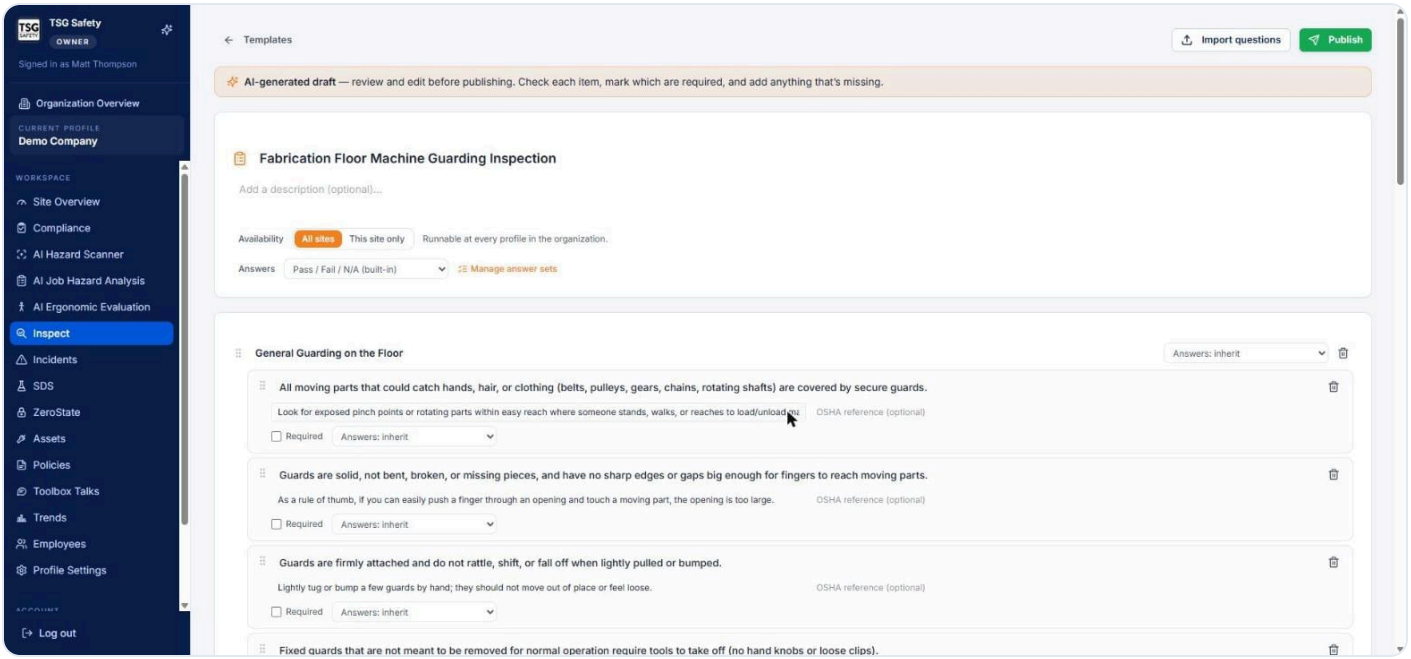
Option A - Generate with AI

Click **Generate with AI** and describe what you want to inspect in plain language.



> Note the line underneath: **Generating for: Demo Company, Manufacturing, Georgia**. The draft is written for your industry and jurisdiction, not from a generic template.

Click **Generate draft**. In a few seconds you land in the builder with a complete, sectioned checklist.



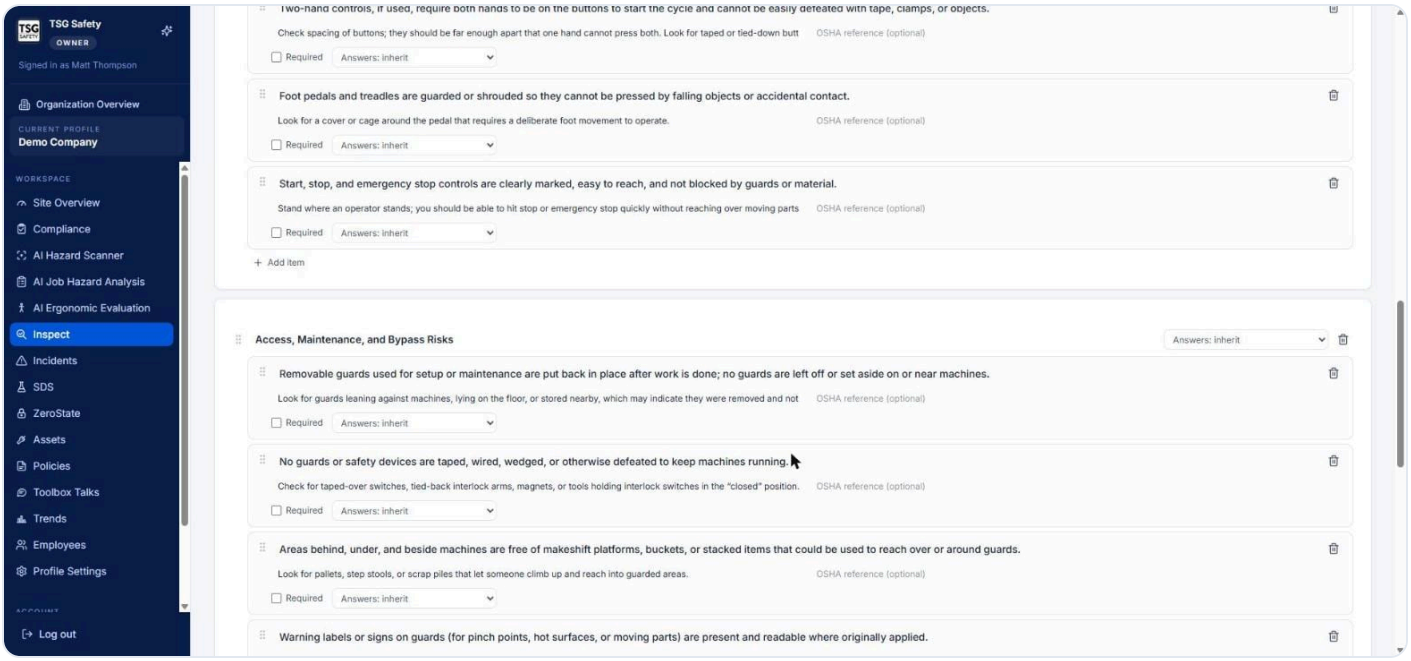
> **The builder.** The orange banner is a reminder, not a warning - the draft is a starting point. Every item has plain-language guidance underneath telling the inspector how to check it.

Option B - Build it yourself

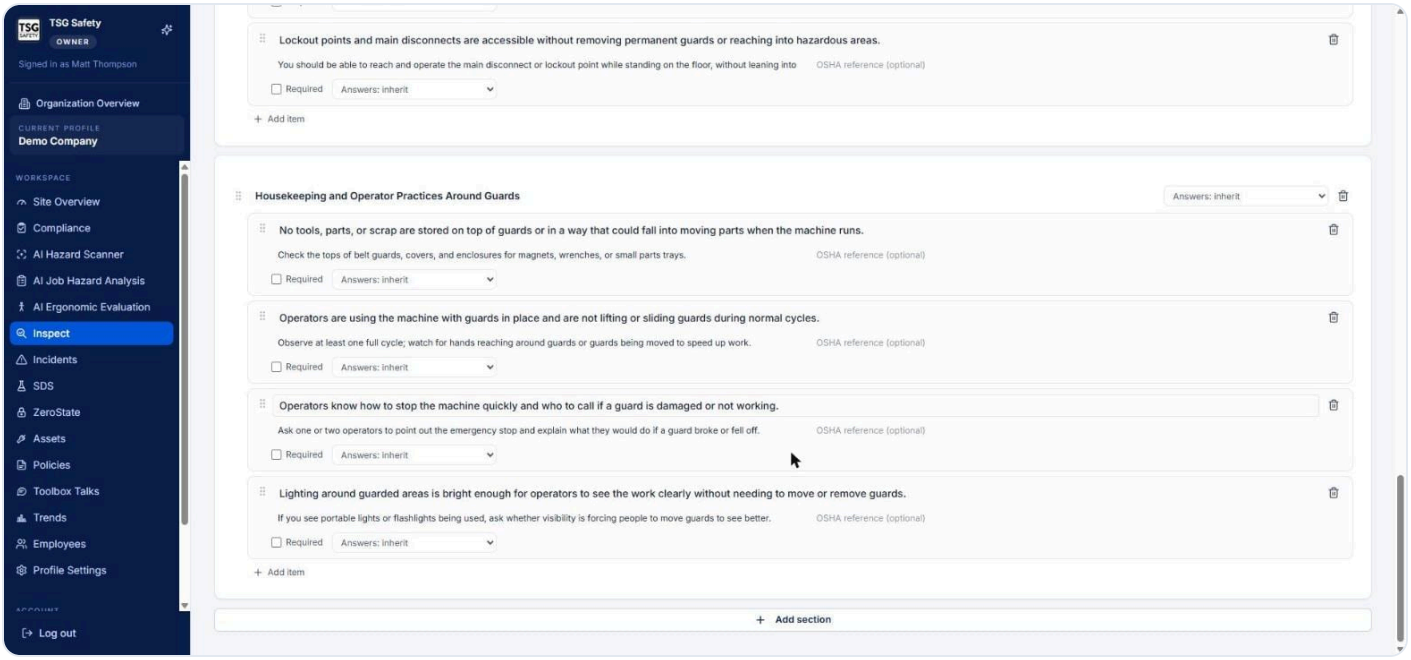
Click **New template** for an empty builder, or **Import questions** to bring items in from elsewhere.

Builder controls

CONTROL	WHAT IT DOES
Title & description	Click the title to rename. Description is optional but helps whoever picks the checklist off the list.
Availability	**All sites** makes it runnable at every profile in the organization; **This site only** keeps it local.
Answers	The answer set for the whole template - *Pass / Fail / N/A* is built in. **Manage answer sets** creates custom ones.
Sections	Groups of items, reorderable by the drag handle. Each section can override the template's answer set.
Item text	Click to edit. Write it as something checkable, not a topic heading.
Guidance line	The grey text under each item. This is where you put the "how do I actually check this" knowledge.
OSHA reference	Optional citation per item. Worth filling for anything you'd be cited on.
Required	Tick to force an answer before the run can be completed.
Add item / Add section	At the bottom of each section and the template.



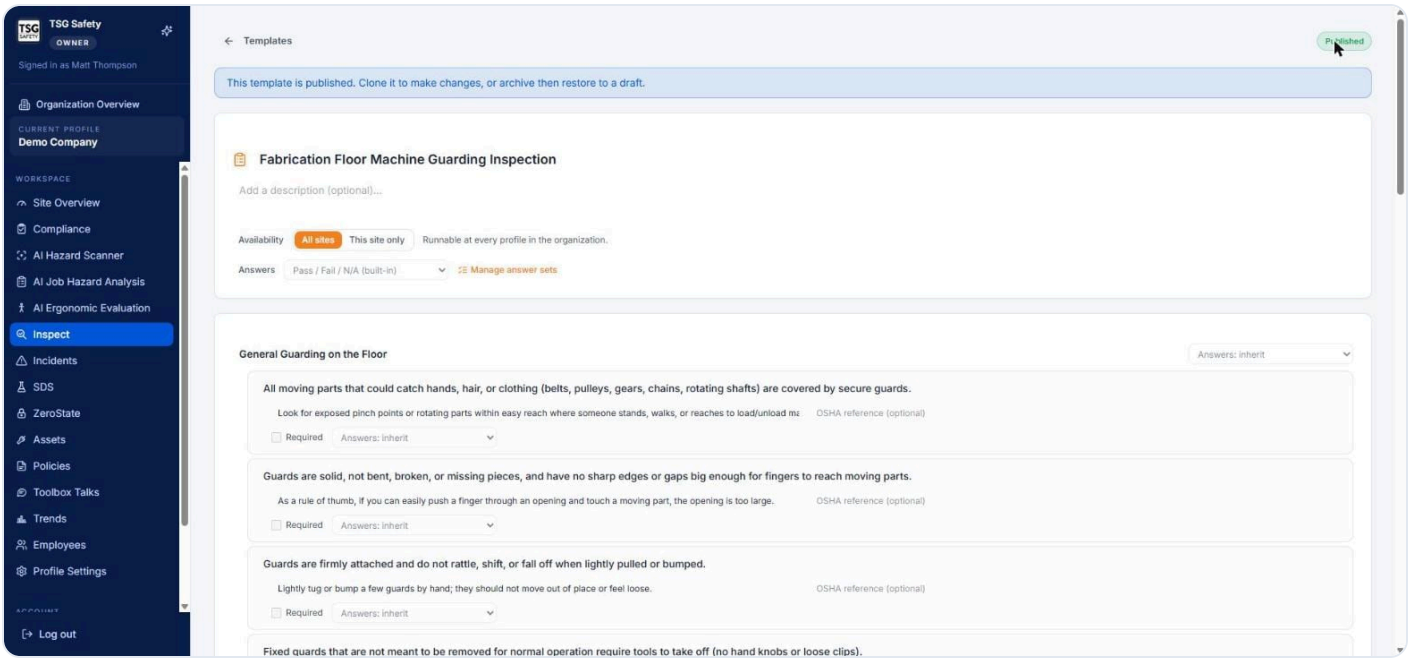
Sections keep long checklists navigable in the field. Drag handles on the left reorder both sections and items.



The end of the builder. **Add section** creates a new group; **Add item** appends to the section above it.

Publish it

Click **Publish** at the top right. The badge flips to **Published** and a blue banner replaces the draft banner.



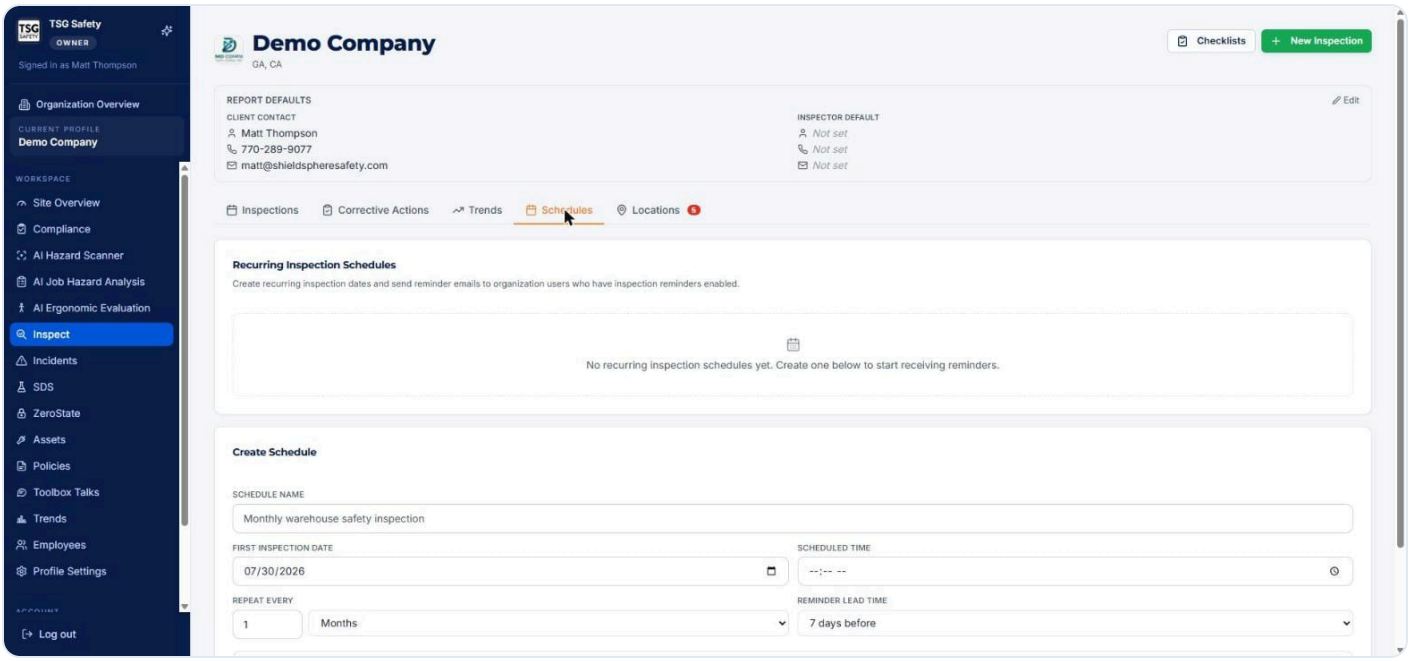
> **Published templates are locked.** "Clone it to make changes, or archive then restore to a draft." This is deliberate - it stops the questions changing under a run that's already in progress.

> **PUBLISHING IS WHAT MAKES IT RUNNABLE**
>
> Drafts never appear in the *Start a Checklist Inspection* list. If someone says a checklist is missing, check its status badge first - that's the answer nine times out of ten.

2 Recurring inspection schedules

`Inspect → Schedules tab`

Schedules generate reminder emails so recurring inspections don't quietly stop happening.



Existing schedules list at the top; **Create Schedule** below.

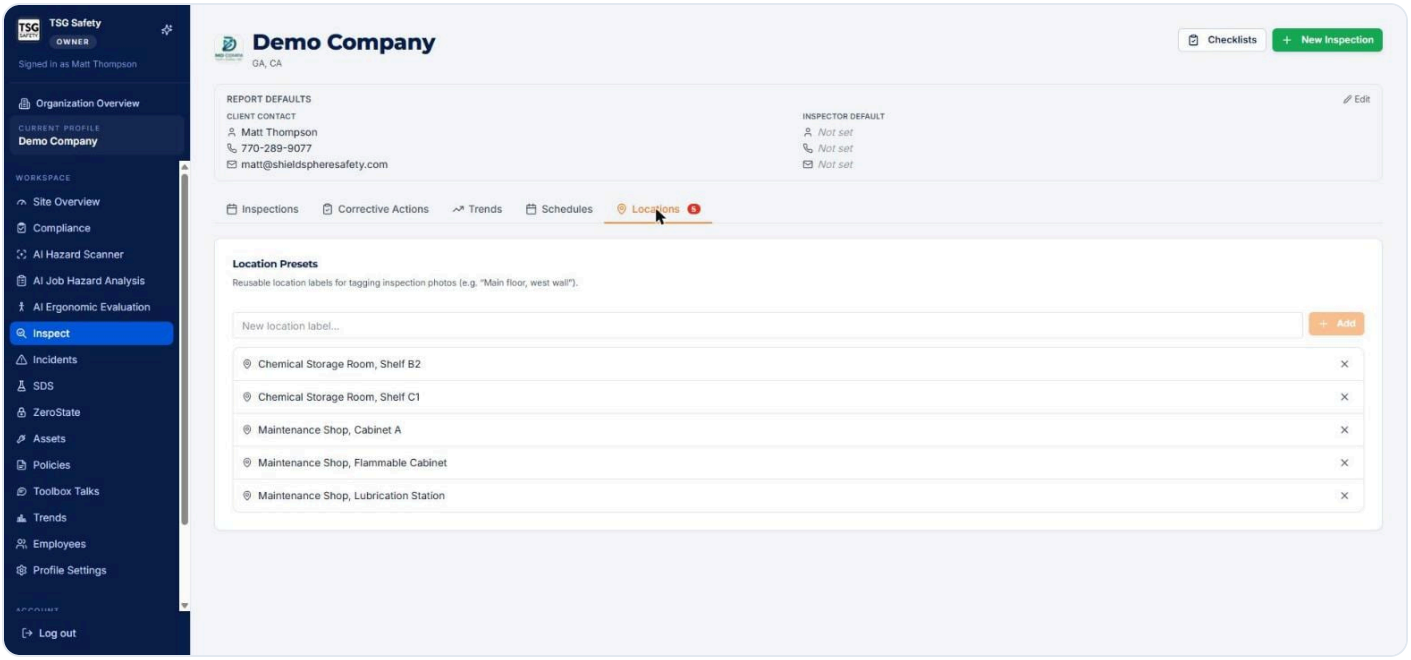
Schedule name	What the reminder will say - e.g. "Monthly warehouse safety inspection".
First inspection date	When the cycle starts.
Scheduled time	Time of day for the inspection.
Repeat every	A number plus a unit (days / weeks / months).
Reminder lead time	How far ahead the email goes out. Default is 7 days before.

WHO ACTUALLY GETS THE EMAIL

Reminders go to organization users who have **inspection reminders enabled** on their own account. Creating the schedule is only half the job - check that the right people have the setting turned on, or the reminder goes nowhere.

3 Location presets

`Inspect → Locations tab`



> Type a label, click **Add**. The **×** on each row removes it. The badge on the tab shows how many exist.

These labels populate the *Select saved location* dropdown when photos are tagged, and they're what the *Hazards by Location* chart groups on. Ten minutes here is the difference between a chart that says "Warehouse 2 has a problem" and one that says nothing.

> **NAMING THAT HOLDS UP**
>
> Go specific and consistent: `Maintenance Shop, Flammable Cabinet` beats `Shop`. Use the same "Area, Sub-area" shape across every preset so the chart groups cleanly and sorts predictably.

4 Report defaults

The panel at the top of the Inspect home holds two blocks, edited with the **Edit** link on the right:

- **Client contact** - name, phone and email printed on every exported report for this site.
- **Inspector default** - pre-fills the inspector fields on every new inspection. Set this and your team stops typing it 40 times a year.

PER SITE, NOT PER ORGANIZATION

Report defaults belong to the site you're currently in. Setting them once does not carry them to your other sites.

5 Troubleshooting

SYMPTOM	CAUSE AND FIX
A checklist isn't in the run list	It's still a draft. Publish it (section 1), or check its availability isn't set to a different site.
I need to change a published checklist	Duplicate it, edit the copy, publish that, then archive the original (section 1).
The location dropdown is empty for the team	No presets exist for this site yet. Add them in the Locations tab (section 3).
Nobody's getting schedule reminders	Reminders go only to organization users who have inspection reminders enabled on their own account (section 2).