SHIELDSPHERE

Inspect

from walkthrough to closed-out finding

How to run photo and checklist inspections, review AI findings, and drive corrective actions to completion.

USER GUIDE – FOR EVERYDAY USERS | VERSION 1.0 | SCREENS CAPTURED JULY 2026

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> ShieldSphere's Inspect module turns a workplace walkthrough into a documented, defensible record. Capture what you saw as photos or checklist answers, and findings are produced against specific OSHA standards. Finalizing locks the record, corrective actions are raised from the findings and assigned to people, and trends roll everything up so you can see what keeps coming back.

1 What Inspect does

Inspect is where a walkthrough of your workplace becomes a documented, defensible record - and then becomes work that actually gets done.

Every inspection in ShieldSphere follows the same arc, whether you photographed a shop floor or worked down a printed-style checklist:

1. **Capture** what you saw - photos, or answers to checklist questions.
2. **Findings** are produced, each tied to a specific OSHA standard.
3. **Finalize** the inspection, which locks the record.
4. **Corrective actions** are raised from the findings and assigned to people.
5. **Trends** roll everything up so you can see what keeps coming back.

That last step is the reason the first four matter. An inspection that ends at "we wrote it down" doesn't reduce risk. Inspect is built so the handoff from finding to fix happens in the same place, without a spreadsheet in the middle.

Photo inspection

Upload site photos and let the AI surface OSHA findings for you. Fastest way to cover a lot of ground.

Checklist inspection

Work through a published checklist, answering each item pass / fail / N/A with notes and photos. Repeatable and auditable.

WHERE INSPECT SITS

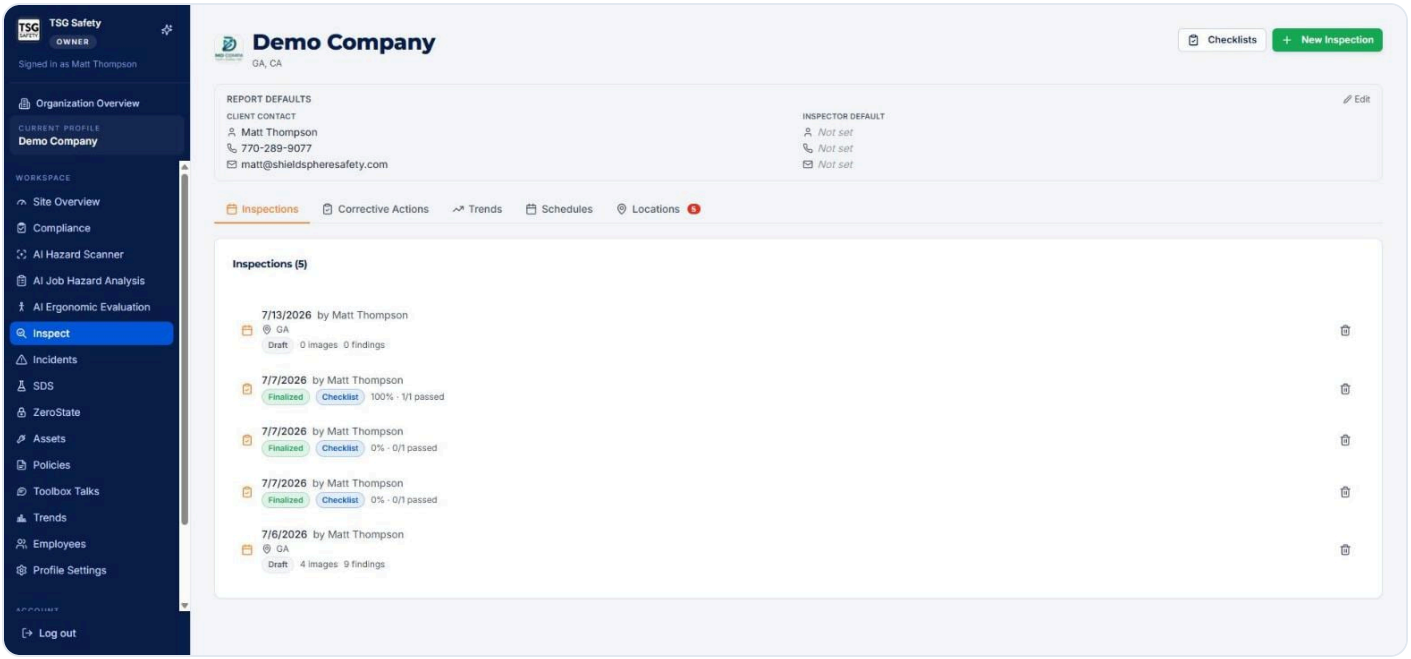
Inspect is a **site-level** module. Everything you do in it belongs to the site (profile) currently selected in the left sidebar. Switch sites and you'll see a different set of inspections. Checklist templates, by contrast, can be shared across every site in the organization.

2 Words you'll see

TERM	WHAT IT MEANS
Site / profile	One physical location or client company. The site name shows under *Current profile* in the sidebar.
Inspection	One walkthrough on one date. Either a photo inspection or a checklist inspection.
Finding	A single problem observed, with a severity, an OSHA citation, and a suggested fix.
Draft	An inspection still being edited. You can add images, edit findings, and change details.
Finalized	A completed inspection. The record is locked and cannot be edited further.
Corrective action	The assigned task that fixes a finding. Has an owner, a due date, and evidence photos.
Checklist template	A reusable set of inspection questions. Must be *published* before anyone can run it.
Location preset	A saved label like "Maintenance Shop, Cabinet A" used to tag where a photo was taken.

3 The Inspect home screen

Click **Inspect** in the left sidebar. You land on the module home for whichever site is currently selected.



> **Inspect home.** Report defaults sit at the top; the five tabs below are the whole module. The two buttons top-right - **Checklists** and **New Inspection** - are where nearly every task starts.

The five tabs

TAB	WHAT LIVES THERE
Inspections	Every inspection at this site, newest first, with its status, image count and finding count.
Corrective Actions	The work queue. Counts by status, a completion bar, filters, and every open action.
Trends	Charts: hazards over time, severity mix, violation categories, and hazards by location.
Schedules	Recurring inspection reminders. Admin setup.
Locations	Reusable location labels for tagging photos. Admin setup. The badge shows how many exist.

> **READING THE LIST AT A GLANCE**
>
> In the Inspections tab, a green **Finalized** badge means the record is locked and complete. An orange **Draft** badge means someone started it and hasn't finished. A blue **Checklist** badge marks checklist runs, and shows the pass rate next to it - for example `100% · 1/1 passed`.

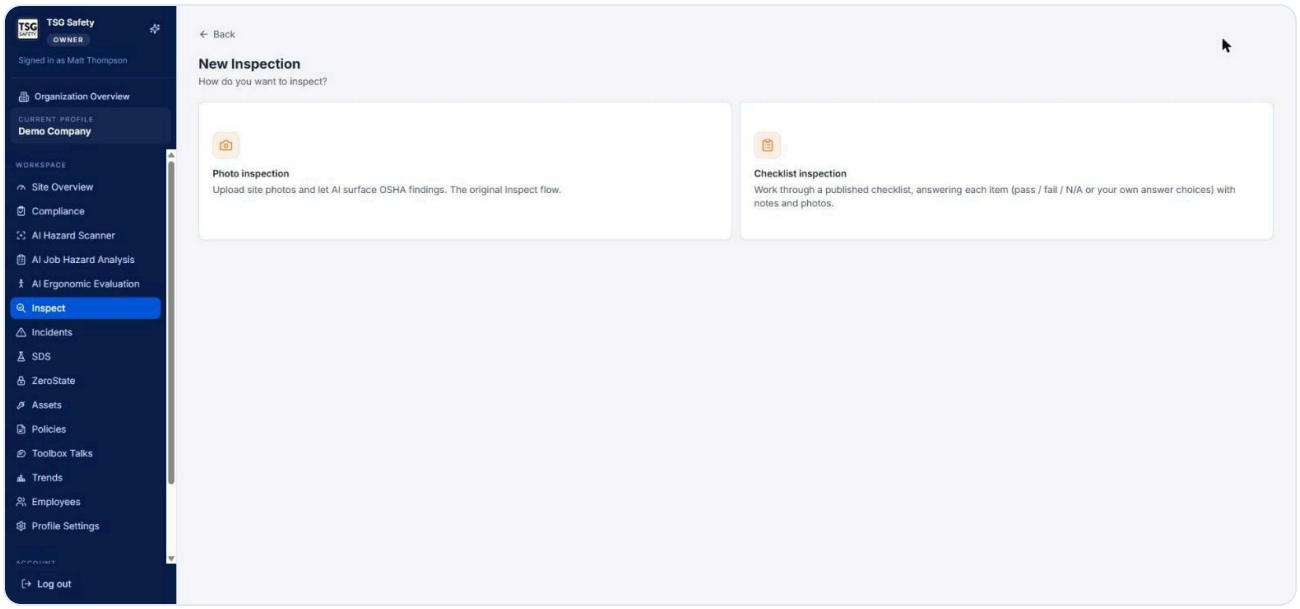
4 Run a photo inspection

You walked the floor and took photos. This turns them into cited findings in about two minutes.

```
Inspect → New Inspection → Photo inspection
```

1 Choose the inspection type

Click **New Inspection** at the top right, then pick **Photo inspection**. Choose this when you want the AI to find the hazards for you. Pick *Checklist inspection* instead when you need to prove that specific questions were asked and answered - see section 6.

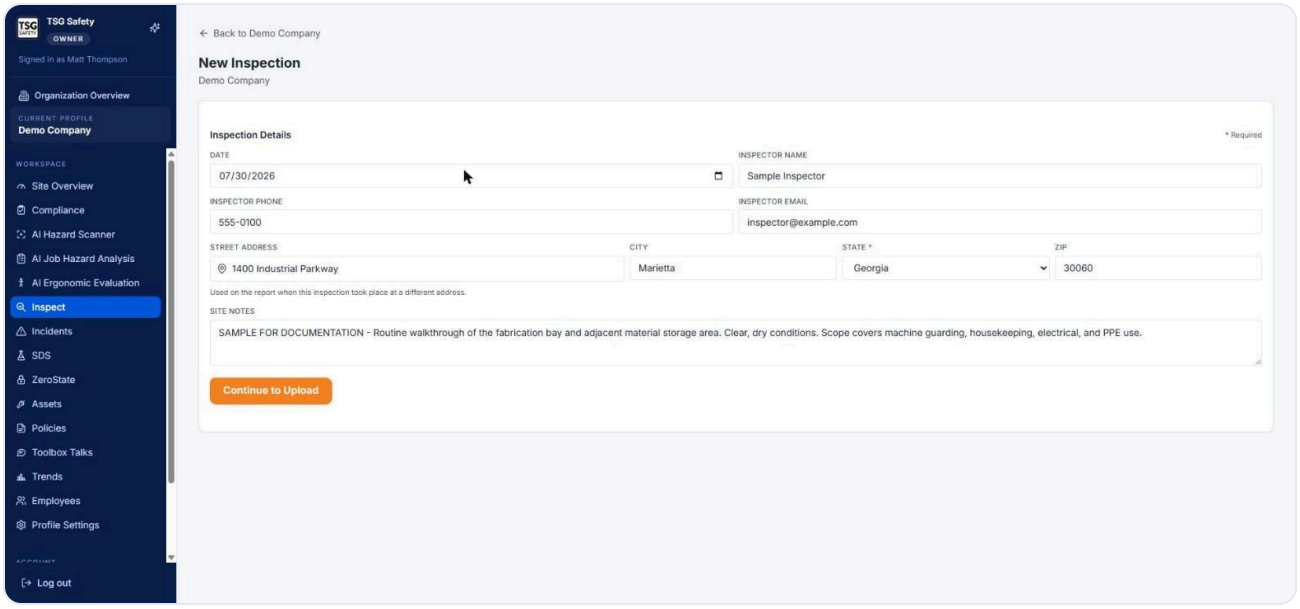


> Two routes into an inspection. This choice is not permanent across the module - you can run both types at the same site.

2 Fill in the inspection details

Date defaults to today. **State is the only required field** - it decides which jurisdiction's standards the AI cites, so get it right. Everything else improves the report but won't block you.

- **Inspector name, phone, email** - appears on the exported report. If your site has an inspector default set, this pre-fills.
- **Street address / city / ZIP** - only needed when the inspection happened somewhere other than the site's registered address.
- **Site notes** - weather, scope, what areas you covered. Worth writing; auditors read it.



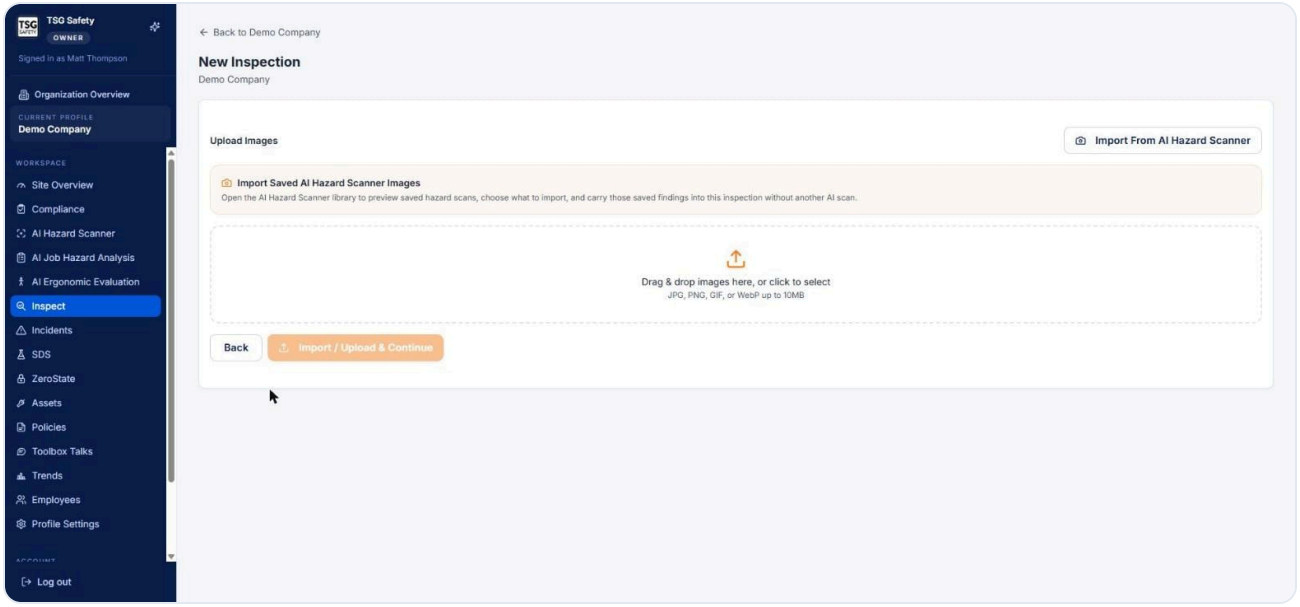
> **Details filled in.** Note the hint under the address fields: it's only used when the inspection took place at a different address.

Click **Continue to Upload**.

3 Add your images

You have two ways to get photos in, and they can be combined in the same inspection:

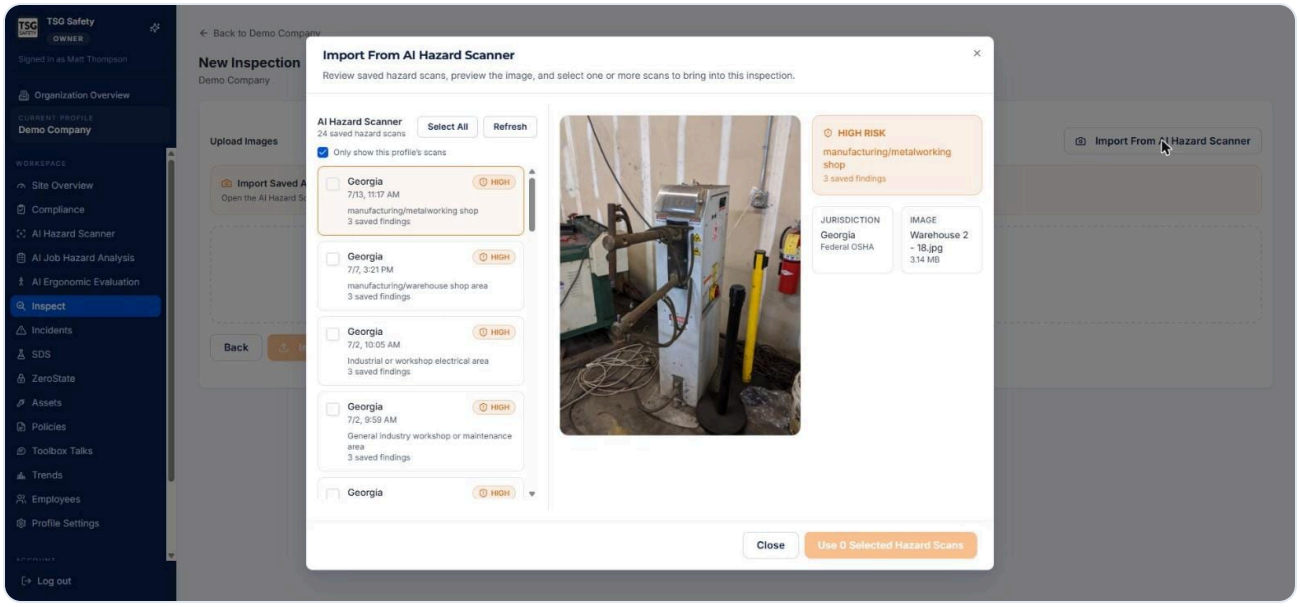
- **Drag and drop** (or click to select) - JPG, PNG, GIF or WebP, up to 10 MB each. These get analysed fresh.
- **Import From AI Hazard Scanner** - pull in photos you already scanned in the Hazard Scanner module, bringing their saved findings with them. No second AI scan, no waiting.



> The upload step. If your team already scans photos in the field with the AI Hazard Scanner, the import route saves you re-uploading them.

4 If importing: pick your scans

The import window lists every saved hazard scan, newest first, with its risk level and how many findings it carries. Click a row to preview the photo and see its jurisdiction and file details on the right. Tick the checkbox on each scan you want, then click **Use *n* Selected Hazard Scans**.

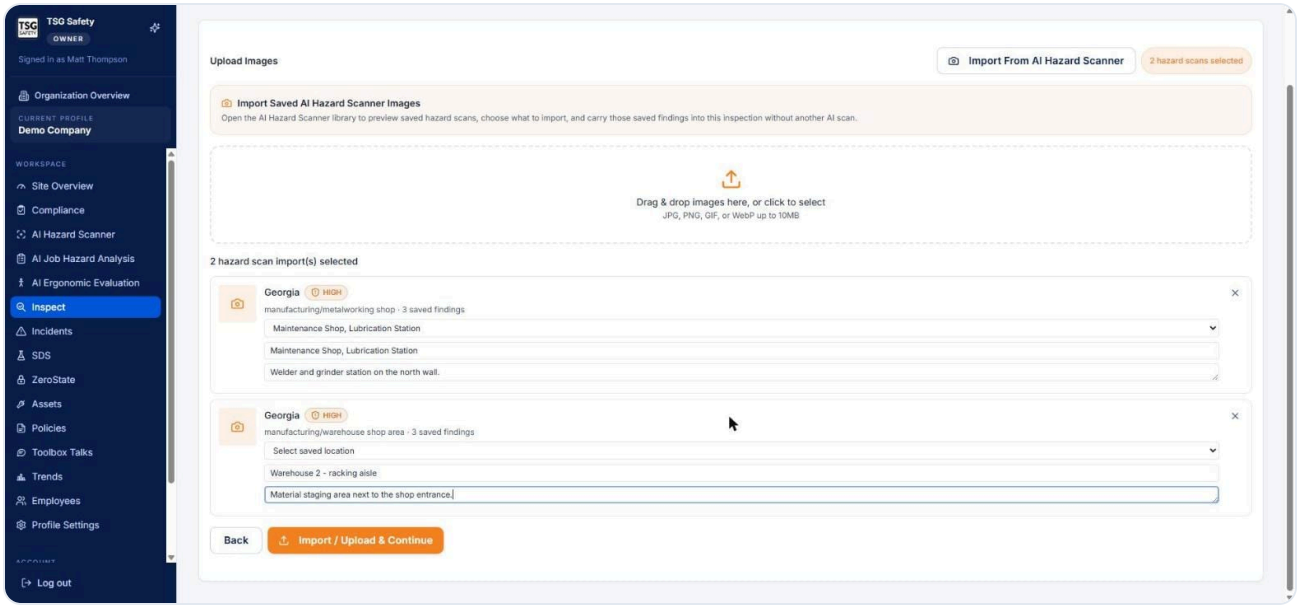


> **Import window.** Leave **Only show this profile's scans** ticked to avoid pulling in a photo from a different site. **Select All** is there for bulk imports.

5 Tag each image with a location

Back on the upload screen, each imported scan gets three optional fields. Filling these in is what makes the *Hazards by Location* chart useful later, so it's worth the ten seconds.

- **Select saved location** - pick from your site's location presets. Choosing one auto-fills the report label.
- **Location for report** - free text if no preset fits.
- **Import notes** - context for whoever reads the report.

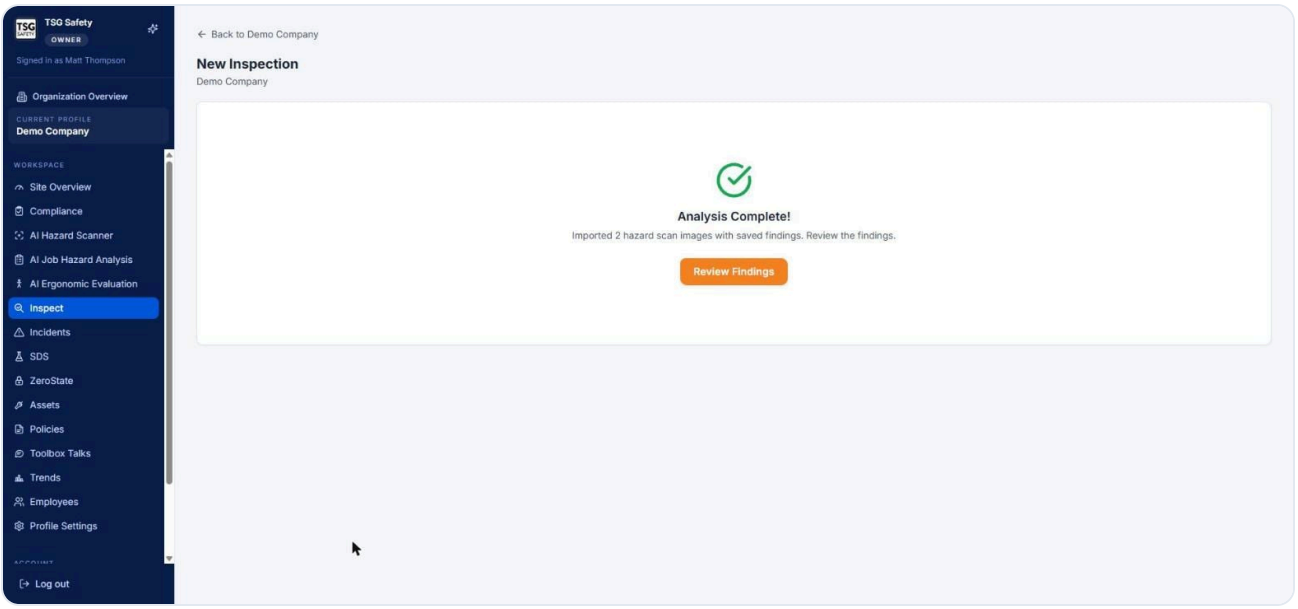


> Two scans tagged and annotated, ready to go. Click **Import / Upload & Continue**.

> **WHERE PRESETS COME FROM**
>
> That dropdown is populated by the **Locations** tab. If it's empty or missing the area you need, see the **Admin Guide** (Location presets).

6 Wait for the analysis

Uploaded photos are analysed now; imported scans carry their existing findings straight through, which is why importing is close to instant. When it's done you'll see a confirmation. Click **Review Findings**.

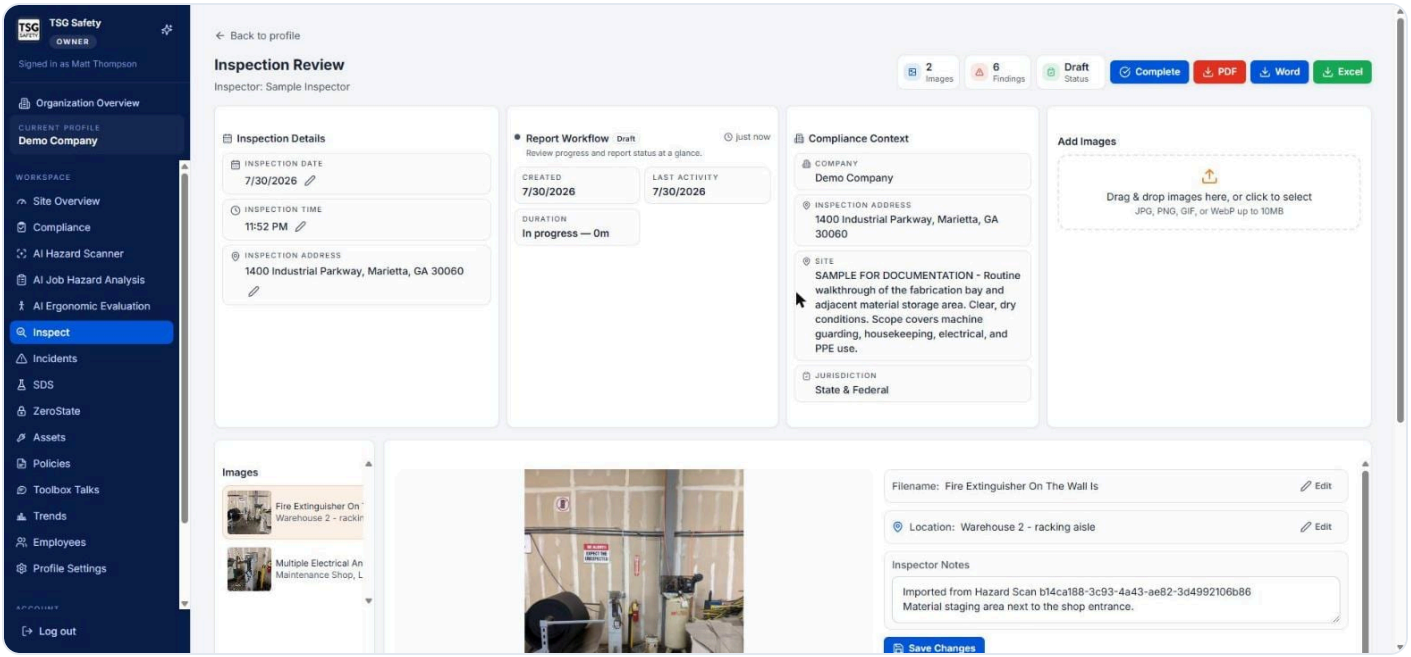


> Analysis complete. The inspection now exists as a **Draft** - if you close the tab here, you'll find it waiting in the Inspections list.

5 Review and finalize findings

The AI drafts. You decide. Nothing leaves this screen as fact until you finalize it.

The Inspection Review screen



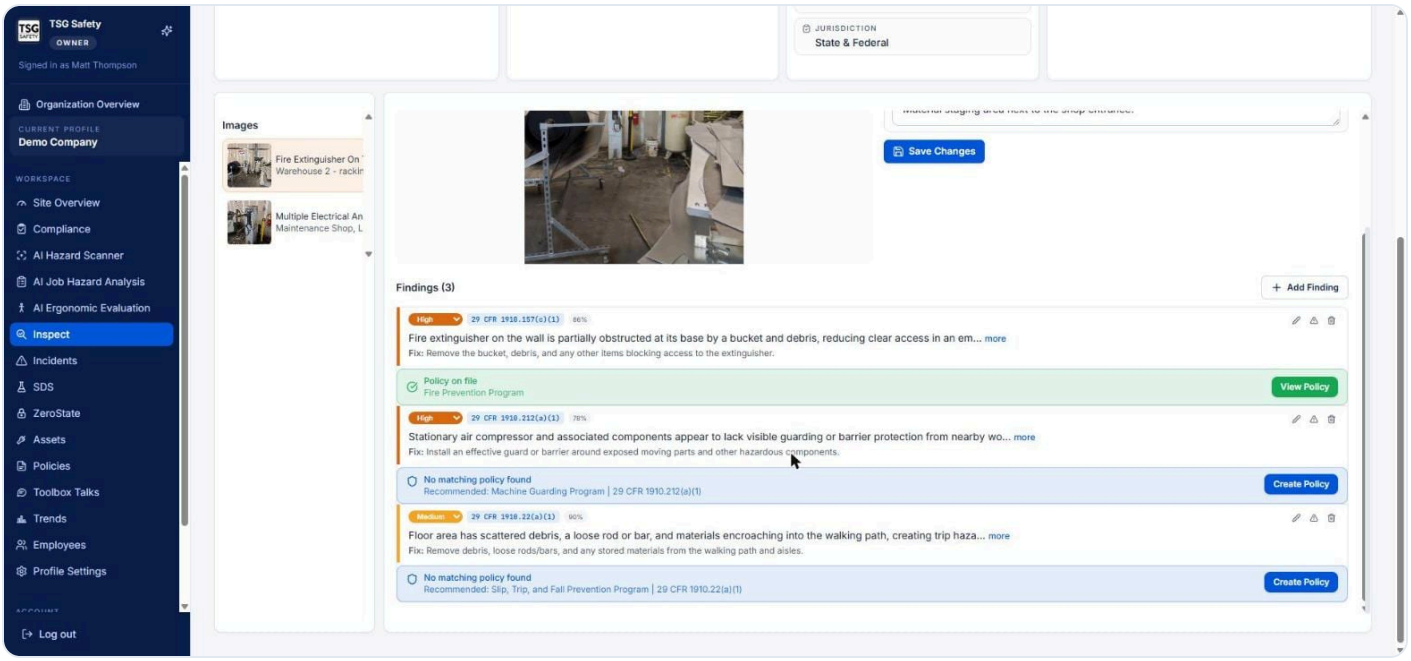
> **Review screen, top half.** The status strip top-right - image count, finding count, **Draft** status - plus the **Complete** button and the three export buttons (PDF, Word, Excel).

Four panels across the top tell you where things stand:

Inspection Details	Date, time and address, each editable via the small pencil icon while the inspection is still a draft.
Report Workflow	Created date, last activity, and elapsed duration. Useful evidence that the walkthrough was real.
Compliance Context	Company, address, your site notes, and the jurisdiction the citations were drawn from.
Add Images	Drop more photos in without leaving the review screen.

Working through the findings

Below the panels, the image strip on the left lets you move between photos. Select one and its findings appear underneath.



> **Anatomy of a finding.** Severity dropdown, the CFR citation, a confidence percentage, the observation, and a suggested **Fix**.

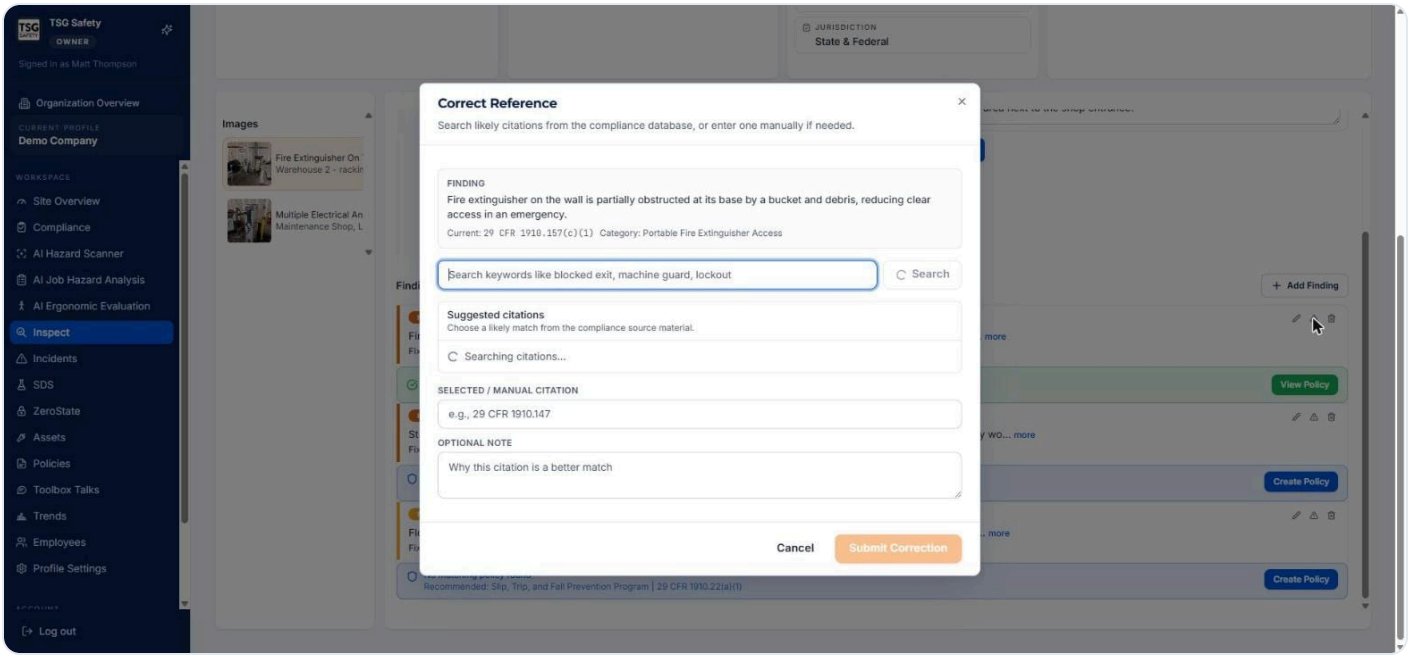
Each finding gives you five things to act on:

- **Severity** - a dropdown (Critical / High / Medium / Low). Change it if the AI over- or under-called it. This drives the due dates on corrective actions later.
- **Citation and confidence** - the specific standard, plus how sure the AI is. Treat anything under about 70% as worth a second look.
- **Fix** - the recommended corrective action. This text becomes the corrective action description, so edit it here if it's not quite right.
- **Policy cross-reference** - a green *Policy on file* bar with a **View Policy** button when you already have a written program covering the standard.
- **Policy gap** - a blue *No matching policy found* bar with a **Create Policy** button when you don't. This is the single most useful thing on the screen: it tells you where a citation would land twice, once for the hazard and once for the missing program.

> **DON'T SKIP THE BLUE BARS**
>
> A *No matching policy found* bar means an inspector could cite you for the hazard **and** for not having a written program. Clicking **Create Policy** takes you straight into generating the recommended program.

CORRECTING A CITATION

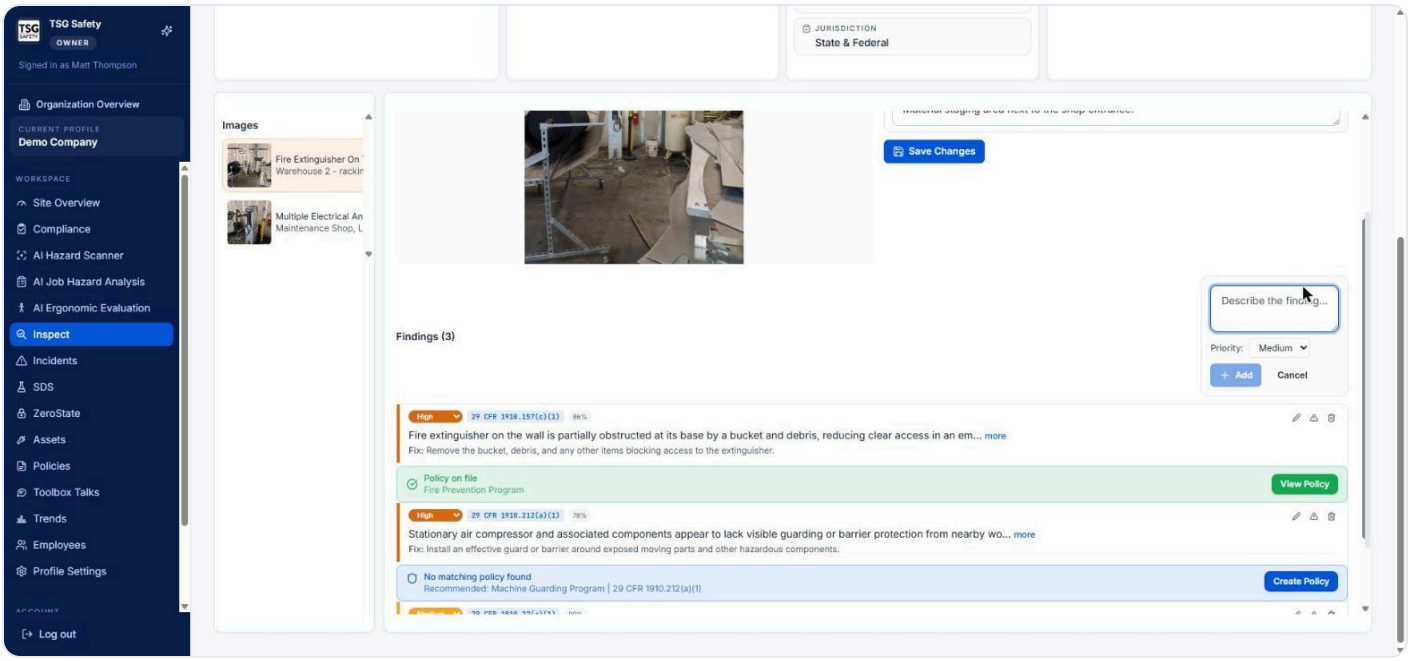
If the AI cited the wrong standard, click the small **triangle icon** on the finding row. Search the compliance database by keyword, pick a better match or type a citation manually, add a note explaining why, and submit.



> **Correct Reference.** The finding text and current citation stay visible while you search, so you can check the match without losing your place.

ADDING A FINDING THE AI MISSED

Click **+ Add Finding**, describe what you saw, set a priority, and click **Add**. Manual findings behave exactly like AI ones from here on - they can be exported and turned into corrective actions.

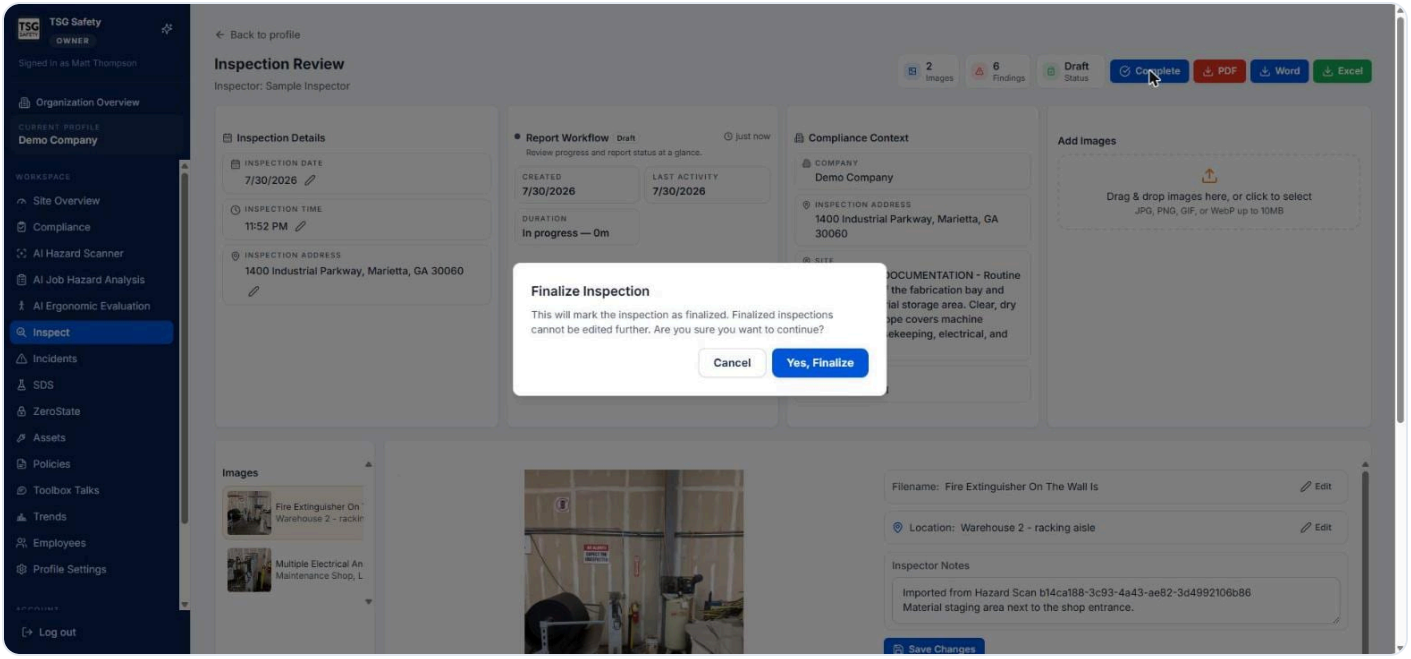


> Adding a finding by hand. Cameras miss things - procedural problems, missing training, near-miss reports from operators.

> **THE THREE ROW ICONS**
>
> Every finding row carries a **pencil** (edit the text inline), a **triangle** (correct the citation), and a **trash can** (delete the finding). All three disappear once the inspection is finalized.

Finalizing

When the findings read the way you'd defend them, click **Complete** at the top right and confirm.

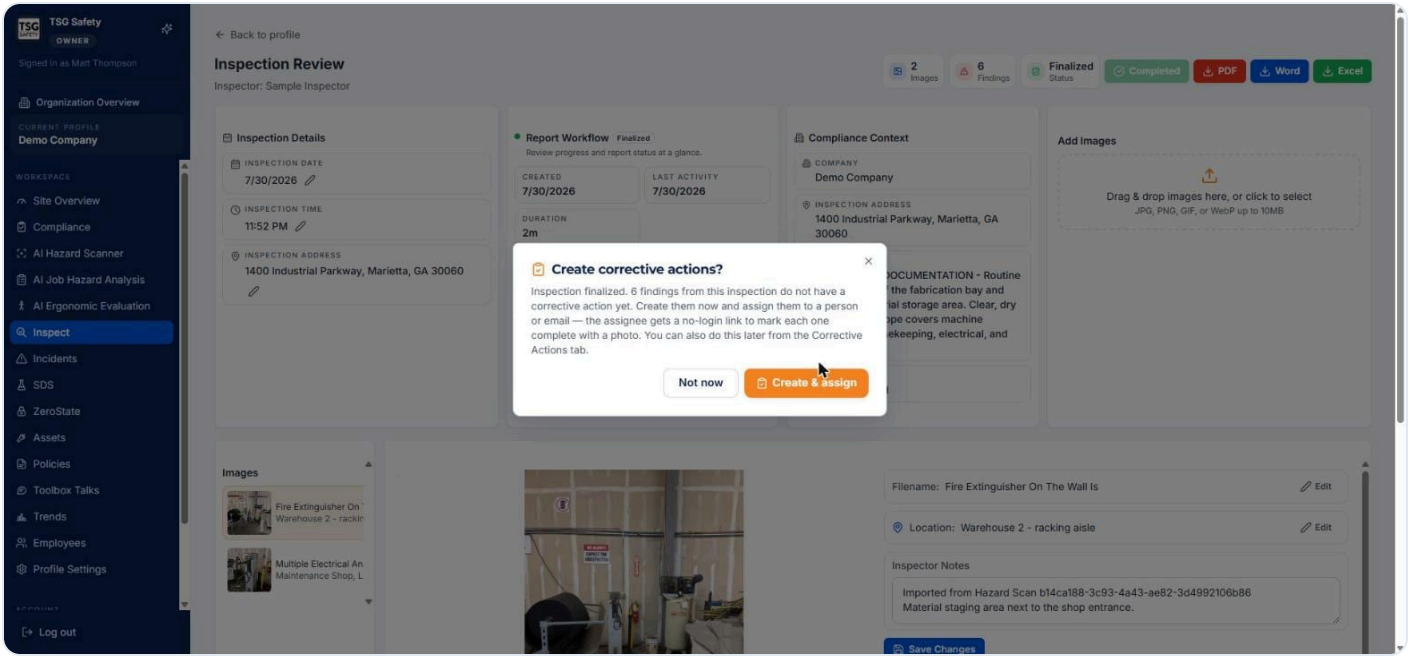


> **This is one-way.** Finalized inspections cannot be edited. Add every image and fix every wrong citation before you click through.

> **BEFORE YOU FINALIZE**
>
> Check that every photo you meant to include is attached, every severity is right, and every citation you doubted has been corrected. There is no unlock.

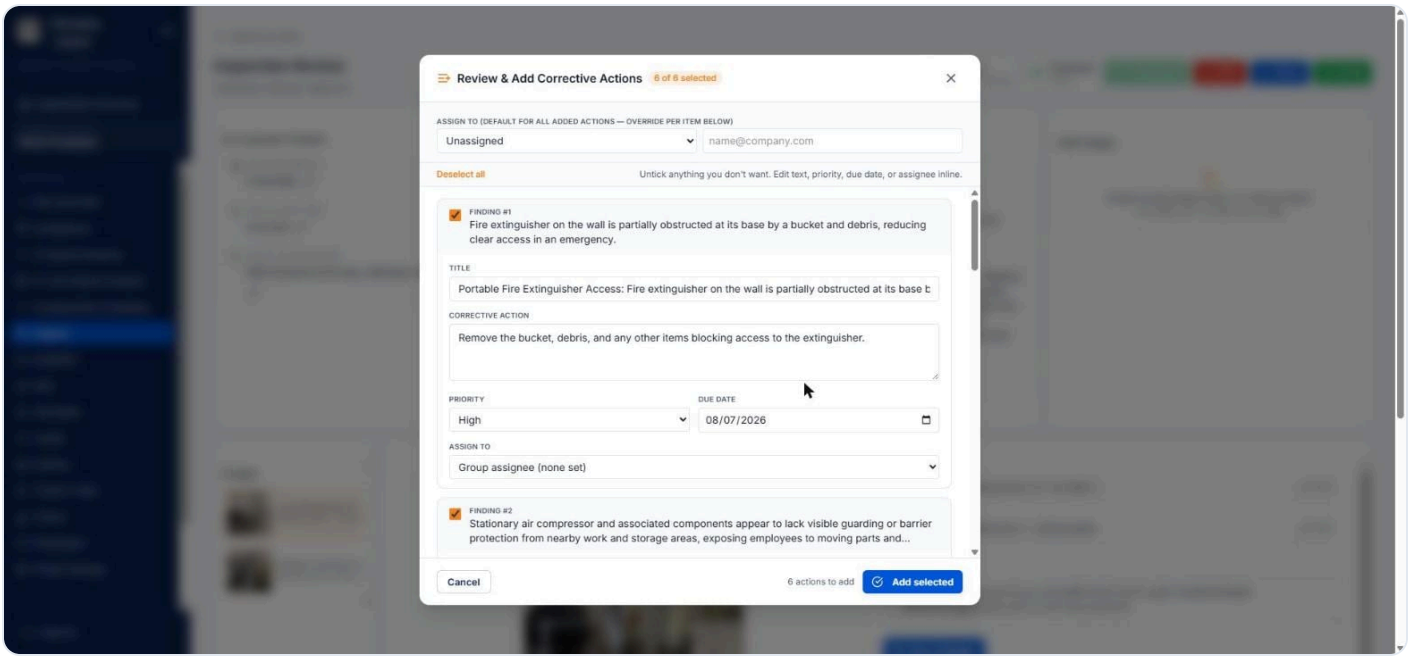
Raising corrective actions

The moment you finalize, ShieldSphere offers to turn the findings into assigned work. This is the step that makes the inspection worth doing.



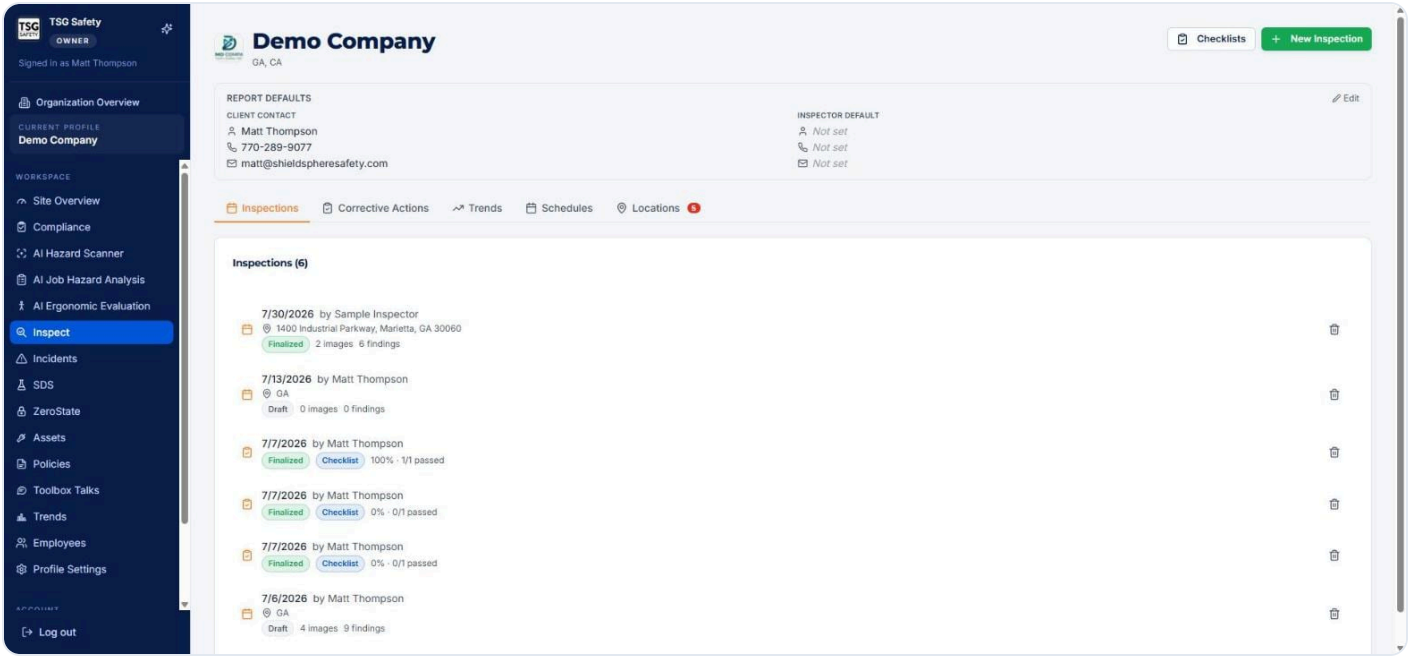
> Click **Create & assign**. If you pick **Not now**, you can do the same thing later from the Corrective Actions tab - nothing is lost.

The review window pre-fills a corrective action for every finding: a title built from the violation category, the fix text as the description, a priority carried over from the severity, and a due date derived from that priority. Everything is editable inline.



> **Review & Add Corrective Actions.** Set a default assignee at the top for all of them, or override per item. Untick anything you don't want raised.

Click **Add selected**. You land back on the inspection, now marked **Finalized** and **Completed**, and the actions appear in the Corrective Actions tab.



> The finished inspection at the top of the list - finalized, 2 images, 6 findings, with the inspection address shown.

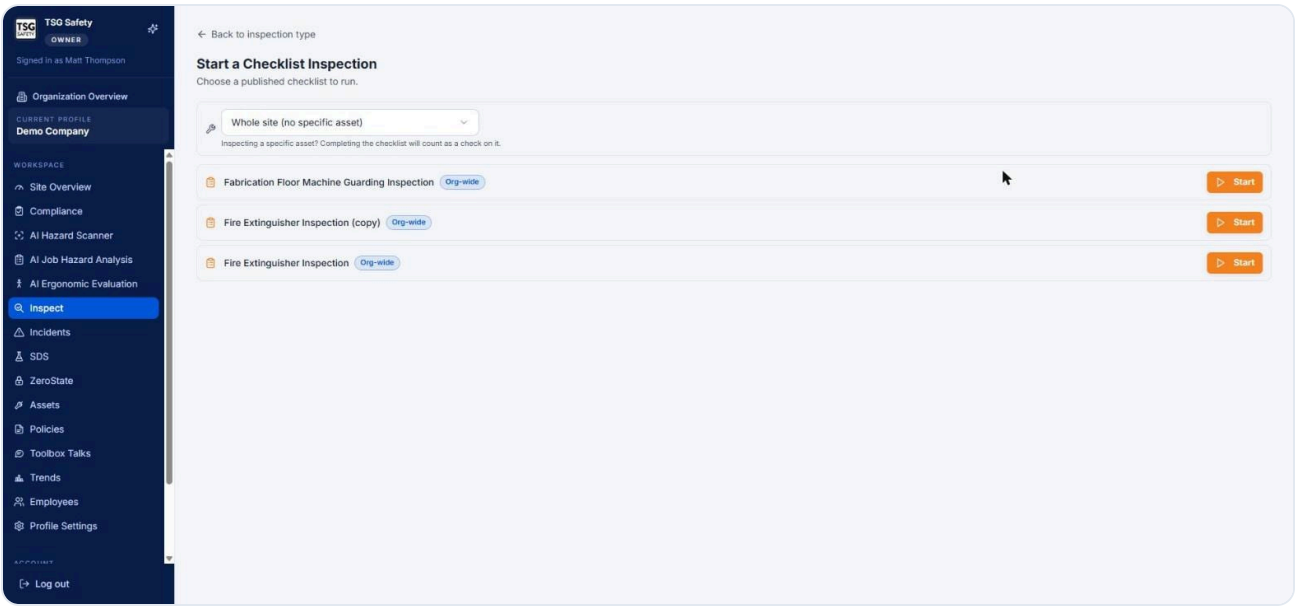
6 Run a checklist inspection

Use this when you need to prove specific questions were asked - a monthly fire extinguisher round, a machine guarding audit, a pre-shift check.

```
Inspect → New Inspection → Checklist inspection
```

1 Pick a checklist to run

You'll see every **published** template available to this site. Drafts don't appear here - if the checklist you want is missing, it hasn't been published yet (see the **Admin Guide** (Build checklist templates)).

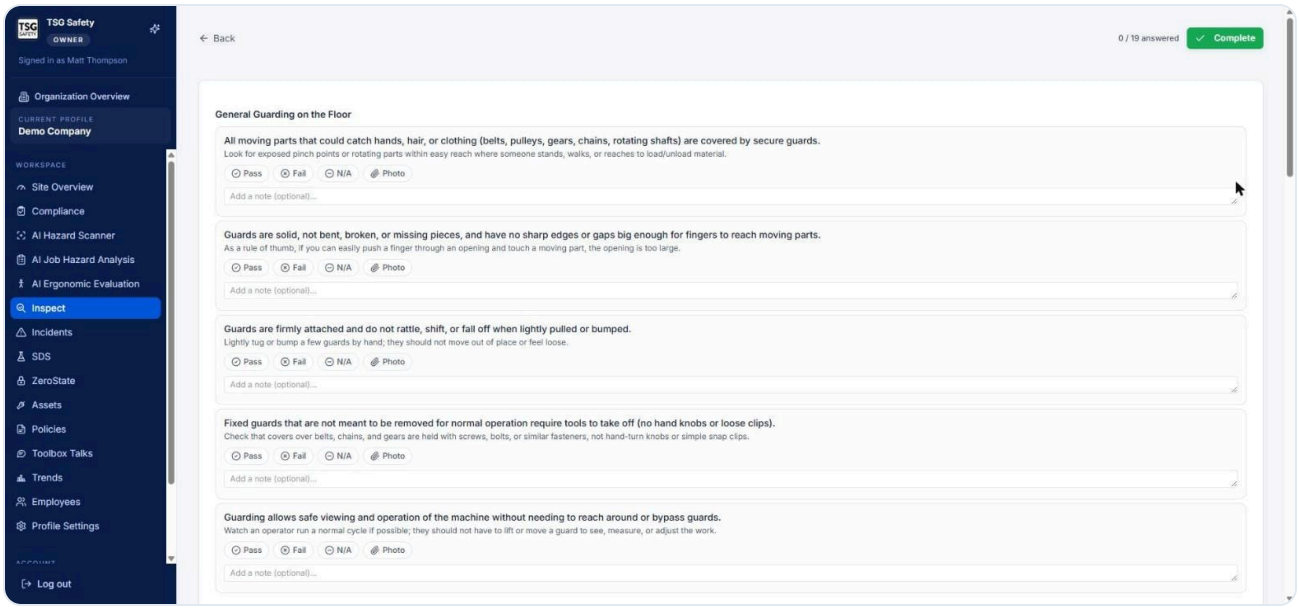


> **Note the dropdown at the top.** Scoping the run to a specific asset means completing the checklist also logs a check against that asset in the Assets module. Leave it on **Whole site** for general rounds.

Click **Start** on the checklist you want.

2 Work down the items

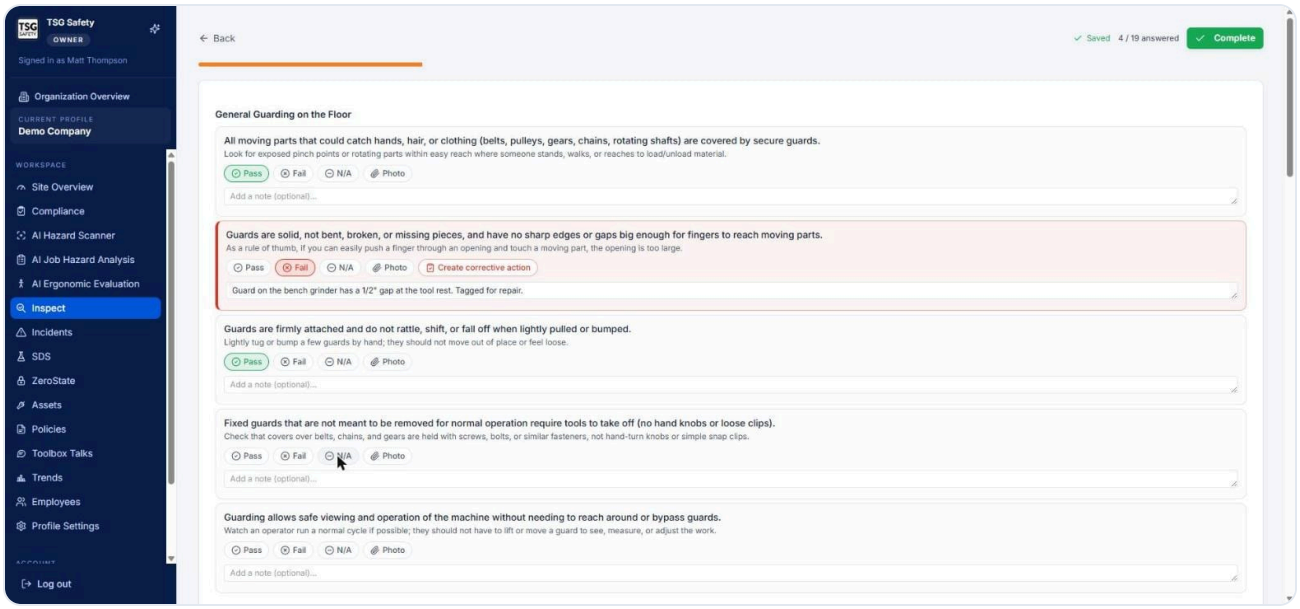
Items are grouped into sections. Each one gives you **Pass**, **Fail**, **N/A**, a **Photo** button, and a note field. The grey line under each question is guidance from whoever built the template - how to actually check the thing.



> A fresh run. The counter top-right (**0 / 19 answered**) tracks your progress.

3 Fail an item and say why

Marking an item **Fail** turns the row red and reveals a **Create corrective action** button. Write what you saw in the note field first - the AI uses it to draft the corrective action for you.

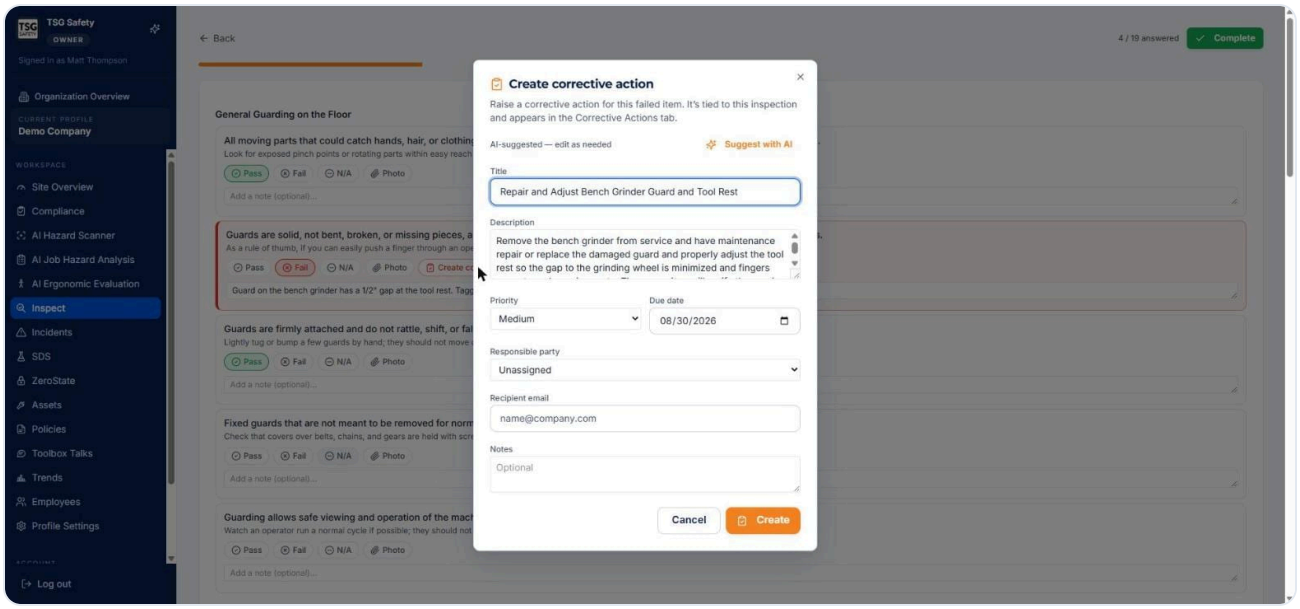


> **Autosave.** The **Saved** marker top-right and the orange progress bar update as you go - you will not lose a half-finished round.

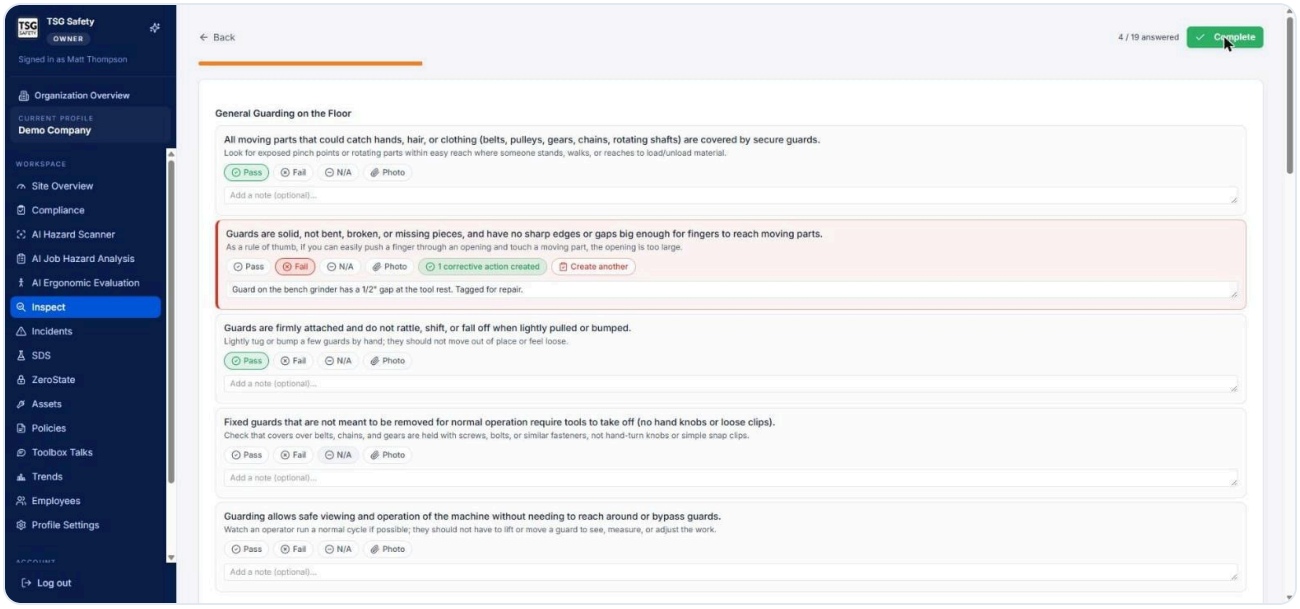
> **NOTES ARE NOT OPTIONAL IN PRACTICE**
>
> "Fail" on its own tells a future reader nothing. "*Guard on the bench grinder has a 1/2" gap at the tool rest*" tells them exactly what to fix - and gives the AI enough to write a usable corrective action.

4 Raise the corrective action

Click **Create corrective action**. The dialog arrives pre-filled from your note - title, description, priority and due date. Edit anything, assign a responsible party, and add a recipient email if the assignee should be notified. Click **Create**.



> **AI-suggested - edit as needed. Suggest with AI** re-drafts it if the first attempt misses. The action is tied to this inspection and appears in the Corrective Actions tab.



> The row now reads **1 corrective action created**, with **Create another** if one finding needs more than one fix.

5 Complete the run

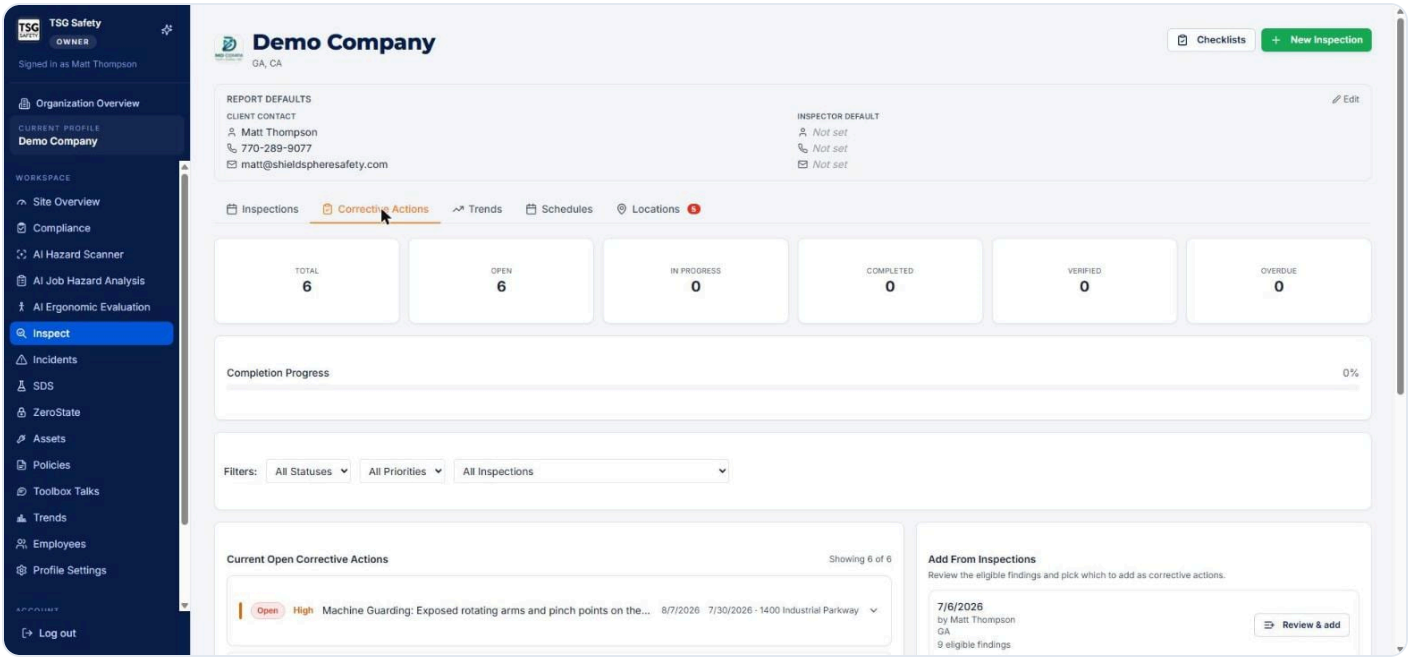
Answer every item, then click **Complete** at the top right. The finished run appears in the Inspections list with a blue **Checklist** badge and its pass rate.

> **COMPLETE WON'T FIRE ON A PARTIAL RUN**
>
> If clicking **Complete** appears to do nothing, check the counter top-right. Every item needs an answer - **N/A** counts. Scroll for the ones you skipped.

7 Work corrective actions to closure

This tab is the actual safety programme. Everything else is paperwork feeding it.

`Inspect → Corrective Actions tab`



> **Six counters across the top:** Total, Open, In Progress, Completed, Verified, Overdue. **Overdue** is the one to watch - it is the number an inspector will ask about.

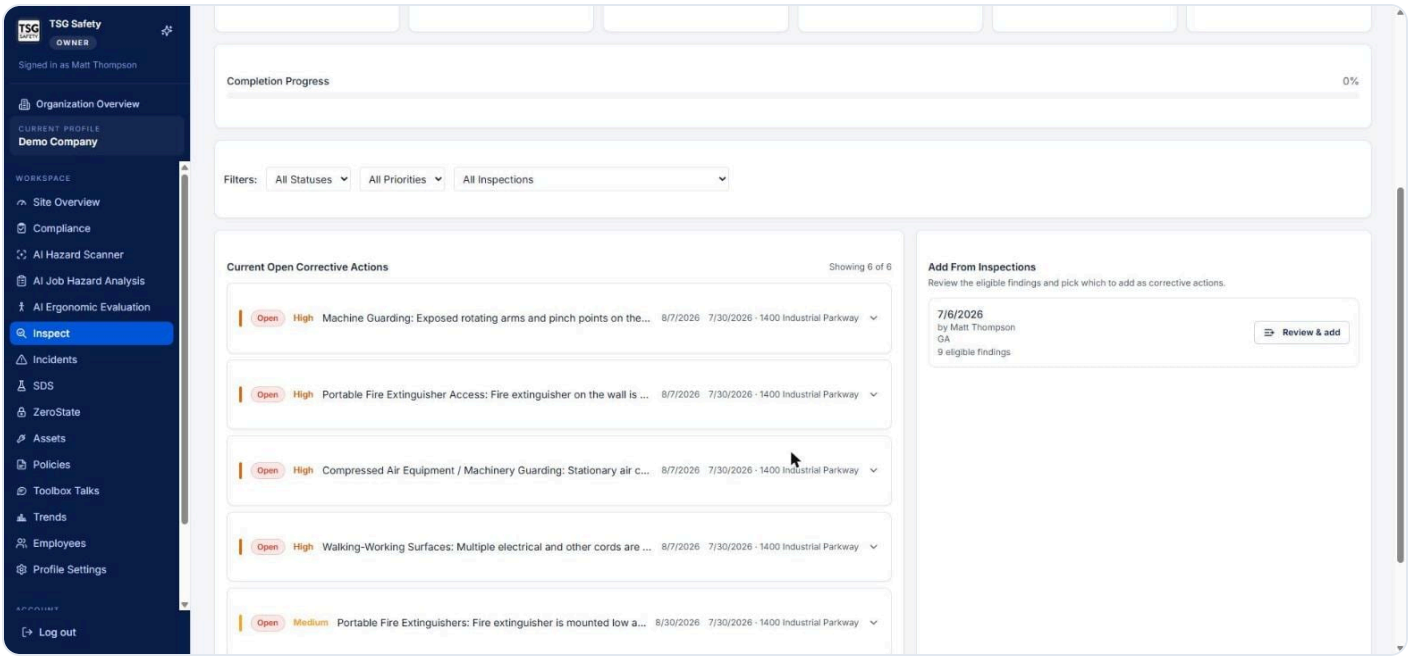
Brief the crew on what you found

Every corrective action carries a **Schedule a toolbox talk** button, whatever its status. It suggests talks from the ShieldSphere library that match the hazard - and you search if none of them fit - then you pick a date. The talk is adopted for this site and scheduled, keeping a link back to the action that prompted it, so a finding turns into a briefing in a couple of clicks rather than a separate job you have to remember.

> **FIXING THE INSTANCE AND FIXING THE HABIT ARE DIFFERENT JOBS**
>
> The corrective action deals with the guard that was missing on that machine. The talk deals with everyone who walks past a machine like it tomorrow. Doing both is what stops the same finding coming back next quarter.

Finding the right action

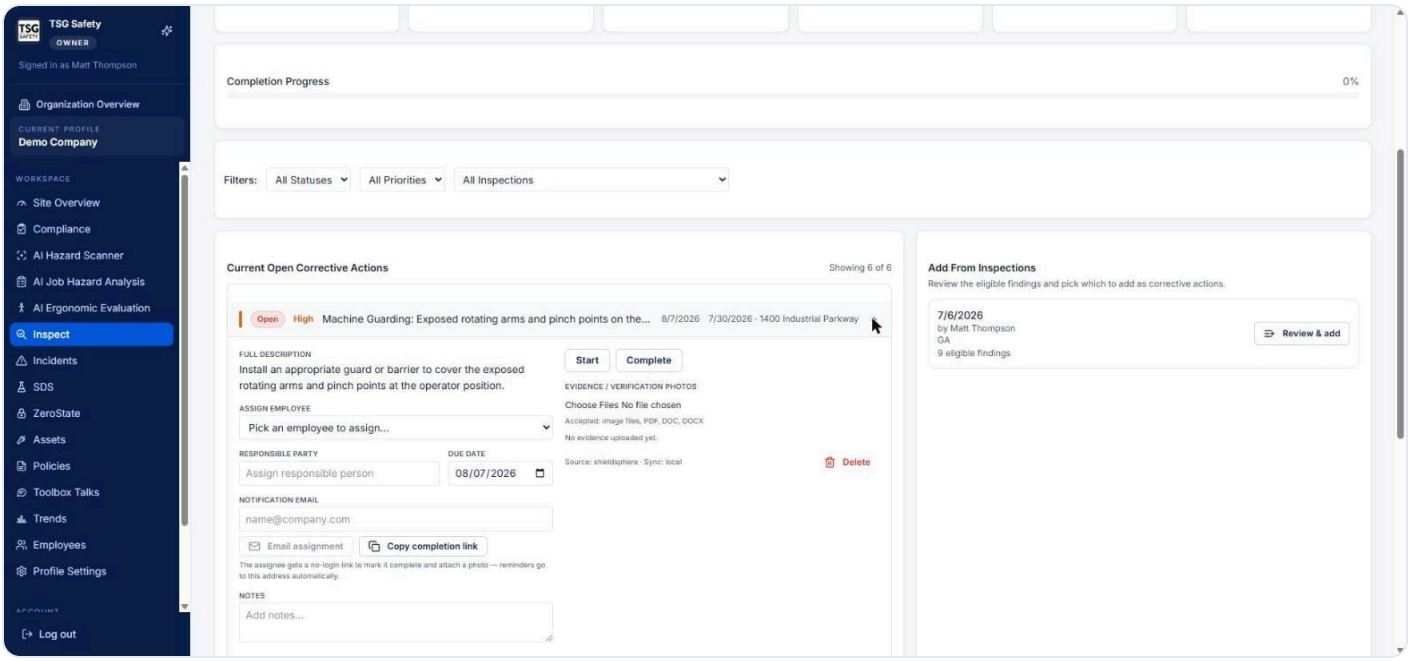
Three filters sit above the list: **status**, **priority**, and **which inspection** it came from. Use the last one when you're closing out a single walkthrough.



> Each row shows status, priority, title, due date, and the inspection and address it came from. The panel on the right, **Add From Inspections**, catches findings from older inspections that never got an action raised.

Inside an action

Click the chevron on any row to expand it.



Expanded corrective action. Assignment on the left, status and evidence on the right.

CONTROL	WHAT IT DOES
Assign employee	Pick from the employees on file at this site.
Responsible party	Free-text owner - use for contractors or anyone not in Employees.
Due date	Drives the Overdue counter. Set from priority by default; change it if the fix genuinely needs longer.
Notification email	Where the assignment and reminders go.
Email assignment	Sends the assignee a no-login link to mark the action complete and attach a photo.
Copy completion link	Same link, copied to your clipboard - paste it into a text, a work order, or a WhatsApp group.
Start / Complete	Moves the action through In Progress and Completed.
Evidence photos	Attach images, PDF or Word proving the fix. This is what turns a claim into a record.

WHY THE NO-LOGIN LINK MATTERS

The maintenance tech who actually fixes the guard doesn't need a ShieldSphere account. Send the completion link, they tick it done and attach a photo from their phone, and your record closes itself. Reminders go to that address automatically.

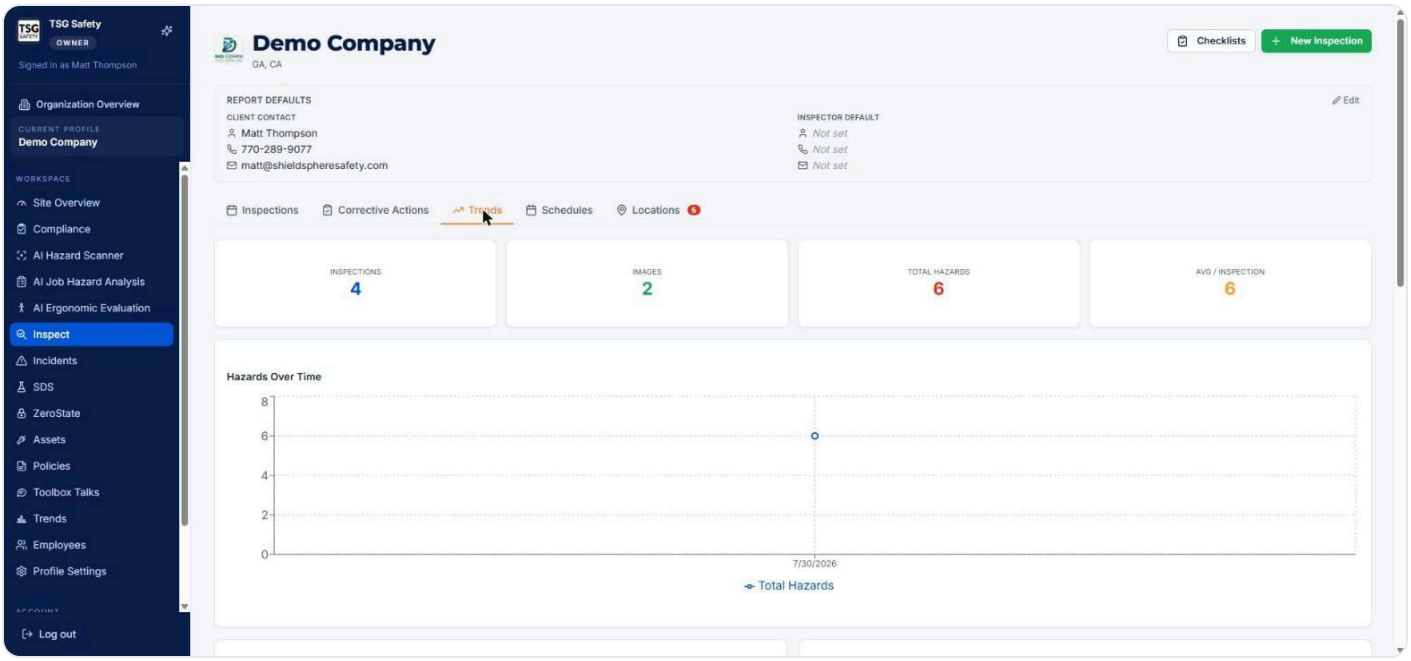
Closing the loop

1. Assign the action and set a realistic due date.
2. **Email assignment** or **Copy completion link** to the person doing the work.
3. They mark it complete and attach evidence - or you do it on their behalf.
4. Verify the fix in person and confirm it, moving the action to **Verified**.

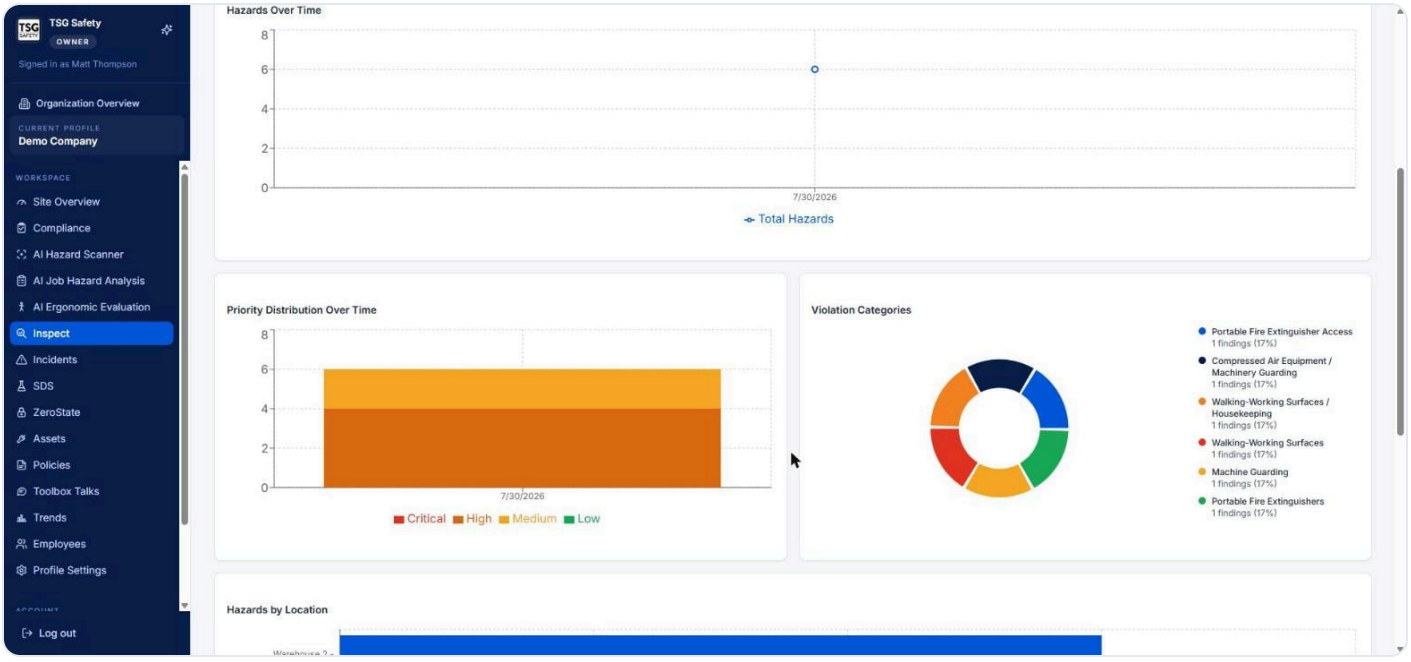
An action sitting at Completed with no photo and no verification is the weakest link in an otherwise good record. Verified with a photo is what closes an inspector's line of questioning.

8 Reading the Trends tab

One inspection tells you what's wrong today. Trends tells you what your programme keeps failing to fix.



Four tiles - inspections, images, total hazards, and average hazards per inspection - then **Hazards Over Time**.



Priority Distribution Over Time, **Violation Categories**, and below them **Hazards by Location**.

What each chart is actually for

Hazards Over Time	Is the site getting safer? A flat or rising line after several inspections means fixes aren't sticking.
Priority Distribution	Are you clearing the serious ones? Watch the Critical and High bands specifically, not the total.
Violation Categories	Where to spend training and capital. One category dominating the donut is your programme's real weak point.
Hazards by Location	Which area needs attention. This chart is only as good as your location tagging - see the **Admin Guide** (Location presets).

> **TWO DIFFERENT TRENDS**
>
> The **Trends** tab inside Inspect covers inspections at this site only. The **Trends** item in the left sidebar is a wider view across all your safety data. They are different screens.

9 Exporting reports

Three export buttons sit at the top right of any Inspection Review screen:

PDF

The client-ready report. Photos, findings, citations and your site notes, formatted for sending or filing.

Word

The same report as an editable .docx, for when you need to add commentary or drop it into a larger document.

Excel

Findings as rows. Use this to merge results across sites or build your own pivot.

Exports work on drafts as well as finalized inspections, but only a finalized inspection is a defensible record - export the draft for internal review, not for the client.

10 Troubleshooting

SYMPTOM	CAUSE AND FIX
My checklist isn't in the list	It's still a draft. Publish it (see the **Admin Guide**, Build checklist templates), or check its availability isn't set to a different site.
Complete does nothing on a checklist	Unanswered items. Check the counter top-right; every item needs Pass, Fail or N/A.
I need to edit a finalized inspection	You can't. Run a new inspection referencing the original in its site notes.
I need to change a published checklist	Duplicate it, edit the copy, publish that, then archive the original.
The location dropdown is empty	No presets exist for this site yet. Add them in the Locations tab - an admin setting (see the **Admin Guide**, Location presets).
Hazards by Location chart is useless	Photos weren't tagged with locations at import. Tag them going forward (section 4, step 5).
Nobody's getting schedule reminders	Reminders go only to users with inspection reminders enabled on their own account.
The AI cited the wrong standard	Use the triangle icon on the finding to correct the reference before finalizing (section 5).
Corrective actions show as Overdue	The due date has passed. Either the work is late, or the date was unrealistic - edit it and note why.
Assignee has no ShieldSphere account	Use **Copy completion link** or **Email assignment** - the link needs no login.

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