SHIELDSPHERE

Mobile App

scan, inspect and sign off from the floor

How to sign in to the ShieldSphere app on your phone, scan hazards, run inspections, raise permits, take training attendance and more, and what keeps working when the signal drops. Written for field users walking the site.

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

WHAT'S IN THIS GUIDE

1 What the app does

2 Sign in

3 Find your way around

4 Scan a hazard

5 Run an inspection

6 The other modules

7 Working without a signal

8 Settings

9 Troubleshooting

The ShieldSphere mobile app puts the field side of your safety program on an iPhone or Android phone. You sign in with your work email, scan hazards from photos or a short video, run inspections, and work through permits, chemicals, job hazard analyses and training sessions. Much work captured offline is sent when you reconnect.

1 What the app does

The app is for the moment you are standing in front of the problem. Capture it, record it, and let ShieldSphere do the paperwork.

It signs in to the same account as the web dashboard, so what you capture in the field is there for your safety manager on the web, and the sites you see are the sites you have been given access to. Which modules appear depends on your organization's plan. Setup and administration, such as writing a job hazard analysis or building the forklift fleet, stay on the web.

Scanner and Inspect

Scan hazards from photos or video with cited OSHA standards, and run photo or checklist inspections with findings and corrective actions.

Ergonomics, ZeroState and Incidents

Ergonomic evaluations, lockout/tagout procedures built from photos, and incident logging for the OSHA 300, 300A and 301 records.

SDS, JHA, Permits and Training

Chemical inventory and label scanning, reading and signing off job hazard analyses, permits to work, and toolbox talk and training sessions with signed attendance.

Overview

Open work, trends and activity for the site you have selected.

RELATED GUIDES

The web versions are covered in the Hazard Scanner, Inspect, Permits, SDS, Job Hazard Analysis, Training Sessions, Incidents and Corrective Actions guides.

2 Sign in

Install ShieldSphere from your phone's app store, open it, and you land on the **Welcome back** screen.

1 Enter your work email

Type your address in **Work email**. The app checks whether your organization uses single sign-on and changes the screen to match.

2 Sign in with a password or with single sign-on

If your organization uses a password, enter it under **Password** and tap **Sign in**. **Keep me signed in on this device** is ticked to begin with; untick it on a shared phone. If you forget your password, tap **Forgot password?**

If your organization uses single sign-on, the password box is replaced by a note reading *Your organization uses single sign-on* and a **Continue with single sign-on** button. Tap it, sign in with your company's identity provider, and you return to the app. Your IT administrator sets this up; see the SSO Admin guide.

IF YOU SEE	IT MEANS
You need a connection to sign in	Signing in cannot happen offline. Find a signal or Wi-Fi and try again.
Your workspace isn't ready yet	Single sign-on worked, but your ShieldSphere workspace has not been set up for you. Contact your administrator, then sign in again.
Single sign-on is temporarily unavailable for your organization	It has been switched off for now. If you had a ShieldSphere password before, you can use it; otherwise contact your administrator.
Sign in with a ShieldSphere password	A link under the single sign-on button. Use it only if you had a ShieldSphere password before single sign-on was set up.

New to ShieldSphere? Tap **Create an account**. If you only want to try it, **Try a free hazard scan. No account needed.** lets you scan before you decide.

3 Find your way around

After sign-in you land on the **Dashboard**. A bar at the bottom switches between the main modules your plan includes: **Dashboard**, **Scanner**, **Inspect**, **Ergonomics**, **ZeroState** and **Incidents**. A tab for a module outside your plan is hidden. The Dashboard's **Modules** grid also holds **SDS Management**, **Job Hazard Analysis**, **Permits**, **Training** and **Overview**, which have no tab of their own. **Settings** opens from the cog in the Dashboard header.

1 Pick your active site

The Dashboard shows the site you are working in, or *Select a profile* if none is chosen. Tap it to switch. What you scan, inspect and see is scoped to that site, and most modules ask you to choose one first.

2 Open a module from the grid

Each tile shows a one-line description. A tile for a module your plan does not include reads *Not in your plan*. Permits is not tied to a plan.

4 Scan a hazard

The Scanner turns what you capture into a first-pass safety review. You verify what is real; a scan is a starting point, not a finding of record.

`Scanner → New scan`

1 Capture photos or a video

Choose the New scan action and take a photo. You can add more angles of the same thing with **+ Add another angle**; the screen shows how many angles you have, up to a maximum of five, and all photos are analyzed together as one scan. Alternatively choose **Scan a video** for one clip of up to 20 seconds. A video replaces the photos, and **Use photos instead** switches back. Multi-angle scans and video scans are included with Growth and above, and the screen says so if yours is not.

2 Confirm the details

Optionally name the **Equipment or area name**, which becomes the scan's title in your history. **Site location** shows your active site; where a state is needed, choose it, because it is used to apply state-specific OSHA citations. Under **Framework** choose **General Industry (29 CFR 1910)** or **Construction (29 CFR 1926)**. Add **Additional context (optional)** if it helps, and decide on **GPS location tagging**.

3 Tap Analyze

The button reads **Analyze hazards**, **Analyze** with your angle count (for example 3 angles), or **Analyze video**. The screen estimates a few seconds for one photo, up to a minute for several angles, and a minute or two for a video. Keep the screen open. If you are offline, the scan is saved on your phone and sent later (section 7).

Open a finished scan from the Scanner list to read it. It shows a summary, the **Jurisdiction**, and the identified hazards with **Corrective action** text and **Citations**, with lower-priority items below a divider. Under **Share & follow up** you can **Create corrective actions**, **Email report** or **Share PDF report**. A video scan carries a *VIDEO SCAN* tag. If nothing was found it reads *No hazards identified*.

If your plan has a monthly scan allowance, the scan form shows how many you have used and when it resets. Video scans are not counted against it.

> **A SCAN SEES ONLY WHAT IS IN FRAME**
>
> A scan reviews what is visible. It cannot flag something that is not in the picture, or a control that is missing. Walk the area, then use the scan to back up what you see.

5 Run an inspection

Inspect is where a site walk becomes findings and corrective actions.

```
Inspect → your site → New inspection
```

1 Choose the kind of inspection

Open the **Inspect** tab, pick your site, and start a new inspection. Choose **Photo inspection** to photograph what you find and have ShieldSphere review the photos, or **Checklist inspection** to work through a prepared list published for the site.

2 Capture photos or answer the checklist

On a photo inspection you can add up to 50 photos on the **Inspection photos** screen and analyze them together. Keep the screen open until it says *Analysis complete*; if some photos fail you can retry them. On a checklist, work through the questions.

3 Add findings by hand when you need to

Choose **Add a finding without a photo** to record something yourself. A **Description** is required; you can set a **Priority**, attach a photo and tag a location. Tap **Save finding**.

4 Complete the inspection

Tap **Complete inspection** and confirm. Once finalized, the inspection can no longer be edited from the app.

Raise a corrective action

From a site's corrective actions list, create an action to fix what you found. Fill in **What needs to be done**, set a **Priority**, choose who to **Assign to** (from the roster, or by entering a name and email), add a **Due date** in YYYY-MM-DD form and any **Notes**, then tap **Create action**. It then follows the workflow in the Corrective Actions guide.

6 The other modules

Each module opens to a list for your active site, with a search box and a main action at the top. What you can do on the phone differs by module.

MODULE	WHAT YOU CAN DO ON THE PHONE
Ergonomics	Start a **New evaluation** from photos of a worker or workstation (up to five), or from a video clip that is analyzed for body posture. A setup panel collects task details used for the posture score. Open a finished evaluation to read its risk factors, recommendations and coaching tips, and to get a **PDF report** or **Email report**. If your organization requires faces to be blurred in ergonomics video, the app asks you to record the clip in the web app instead; photos still work.
ZeroState	Start a **New procedure**: photograph the machine and its energy sources, and ShieldSphere drafts a lockout/tagout procedure with warnings, required PPE and required hardware. You review it, then save.
Incidents	Use **Log incident** to report an injury, illness or near miss, with classification, outcome, a body diagram and photos. Open an incident to change its review status, edit it and its OSHA 301 details, add a corrective action, or open a linked root cause analysis, where you can edit the title and problem statement, work the 5 Whys, and complete or reopen it. Fishbone, causal tree and timeline structure are read-only on the phone.
SDS Management	Choose **Scan labels** and photograph container after container, or pick photos from your library. ShieldSphere reads the labels, then you check each row against its photo and tap **Save all**; nothing is saved until you do. You can also add a chemical by hand, and open a chemical's safety data sheet.
Job Hazard Analysis	Read a final JHA on the phone, with its steps, hazards and controls, and play its task video where it has one. A supervisor standing with the crew can record each person's in-person acknowledgment. JHAs are written and finalized on the web.
Permits	**Raise a permit** by choosing a type and answering its questions, then save a draft or submit it for approval. On a permit you see its details and history and can act on it. Approve, Mark active and Reject are limited to organization owners and admins.
Training	Two segments: **Sessions** and **Forklift evaluations**. Use **Start a session** for a toolbox talk or training class, then **Start sign-in** to pass the phone around so each person signs in with a signature. You can also add attendees yourself and

	Close session. Forklift evaluations are scored on the phone and completed with the evaluator's signature.
Overview	Open work, trends and activity for the site.

Even where a module is available, setup stays on the web, for example adding forklifts to the fleet or linking job roles to a JHA.

7 Working without a signal

Basements, plant interiors and remote jobsites often have no signal. Some of the app is built for that and some is not, so here is what to expect.

Kept on your phone and sent when you reconnect

- **Hazard scans**, photo or video. Analysis needs a connection, so it runs after you reconnect. You see **Saved for upload**.
- **Ergonomics photo evaluations**, saved and analyzed when you reconnect.
- **Inspection findings, checklists and corrective actions**, and **incident reports** with their photos.
- **SDS label photos.** Photos are kept on the device and read when you reconnect, and you can review what has been read before you save.
- **Forklift evaluation scoring.** Your changes are kept on the phone and saved on reconnect.
- **ZeroState drafts.** You can save a procedure as a draft offline; the AI step generation needs a connection.

Readable offline, but changes need a connection

- Lists and records you have opened before, such as permits, JHAs, chemicals and training sessions, show the saved copy. A banner tells you that you are offline and seeing saved data.
- The saved copy can be out of date until you have a signal again.

Needs a connection

- Signing in.
- Changing a permit, raising a permit, starting a training session, taking attendance, and closing a session. The buttons are disabled with a line saying why.
- Recording JHA acknowledgments, adding a chemical by hand, and starting a forklift evaluation.
- Ergonomics video evaluations, and completing or signing a forklift evaluation.
- Editing an incident, deleting an incident, and changing its review status.

Anything waiting to be sent shows as **Waiting to upload**, **Saved on this device** or **Upload failed** until it completes.

```
Dashboard → Settings (cog) → Sync
```

Under **Sync**, **Pending uploads** shows how many items are waiting and how many need attention. Tap it to see each one and choose **Retry** or **Delete**. When all is sent it reads *Everything is uploaded*. A **Background sync** line explains what your phone will do: on Android the app can send on reconnect, and on iPhone it sends when you next open the app or when the system grants time.

> **OPEN THE APP AFTER A DEAD ZONE**
>
> On an iPhone, open ShieldSphere once you are back in coverage so waiting items are sent straight away.

> **TREAT THIS AS A GUIDE**
>
> This section describes how the app is built to behave. Confirm anything critical, such as a permit or an incident report, has been sent before you rely on it.

8 Settings

Open **Settings** with the cog in the Dashboard header. It shows who you are signed in as, and:

SETTING	WHAT IT DOES
Unlock with Face ID, Touch ID or fingerprint	Locks the app and asks for your biometrics when you come back to it. The label matches what your phone supports, and the switch is disabled if the phone has none set up.
Push notifications	Alerts on this device. The screen's own note explains whether notifications can be turned on yet.
Sync	Pending uploads and background sync, as in section 7.
Sign out	Signs you out of the app on this phone.

When the app is locked you see **Locked** and an unlock button, with a **Sign out** option if you cannot unlock.

9 Troubleshooting

WHAT YOU SEE	WHAT TO DO
Select a profile, or Choose a site first	Pick your active site on the Dashboard first.
This module is not in your plan	Your organization's plan does not include it. Ask your ShieldSphere contact.
Permits are not set up yet	The permit module has not been switched on for your organization. Ask your ShieldSphere contact to switch it on.
All scans used for the month	The allowance resets at the start of the next month, or your plan can be upgraded.
A tab you expect is missing	Tabs for modules outside your plan are hidden.
Multi-angle or video scans are not offered	They are included with Growth and above.
Cannot analyze, or connection lost	Your photos and settings are kept. Try again when you reconnect.
A pending item says Upload failed	Open Settings, then Pending uploads, and tap Retry. If it keeps failing, Delete it and capture it again.
Approve, Mark active or Reject is missing on a permit	Those actions are for organization owners and admins.
Sign-in says email or password does not match	Check the email, or use Forgot password?. If your organization uses single sign-on, use the single sign-on button instead of a password.

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