SHIELDSPHERE

Organization Dashboard

every location, one picture

How administrators read the multi-site Organization Overview, filter it by location, state, group and industry, follow corrective actions and incidents across every site, see the organization-wide OSHA 300 and 300A rollup, bulk-import many locations at once, and understand how each person's site access limits what they see.

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

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> ShieldSphere's Organization Dashboard is the multi-site view that appears once your organization has at least one completed location. It rolls corrective actions, inspections, hazard scans, training and OSHA 300 and 300A figures up across every site, lets administrators filter by location, state, group or industry, and imports many locations from one spreadsheet.

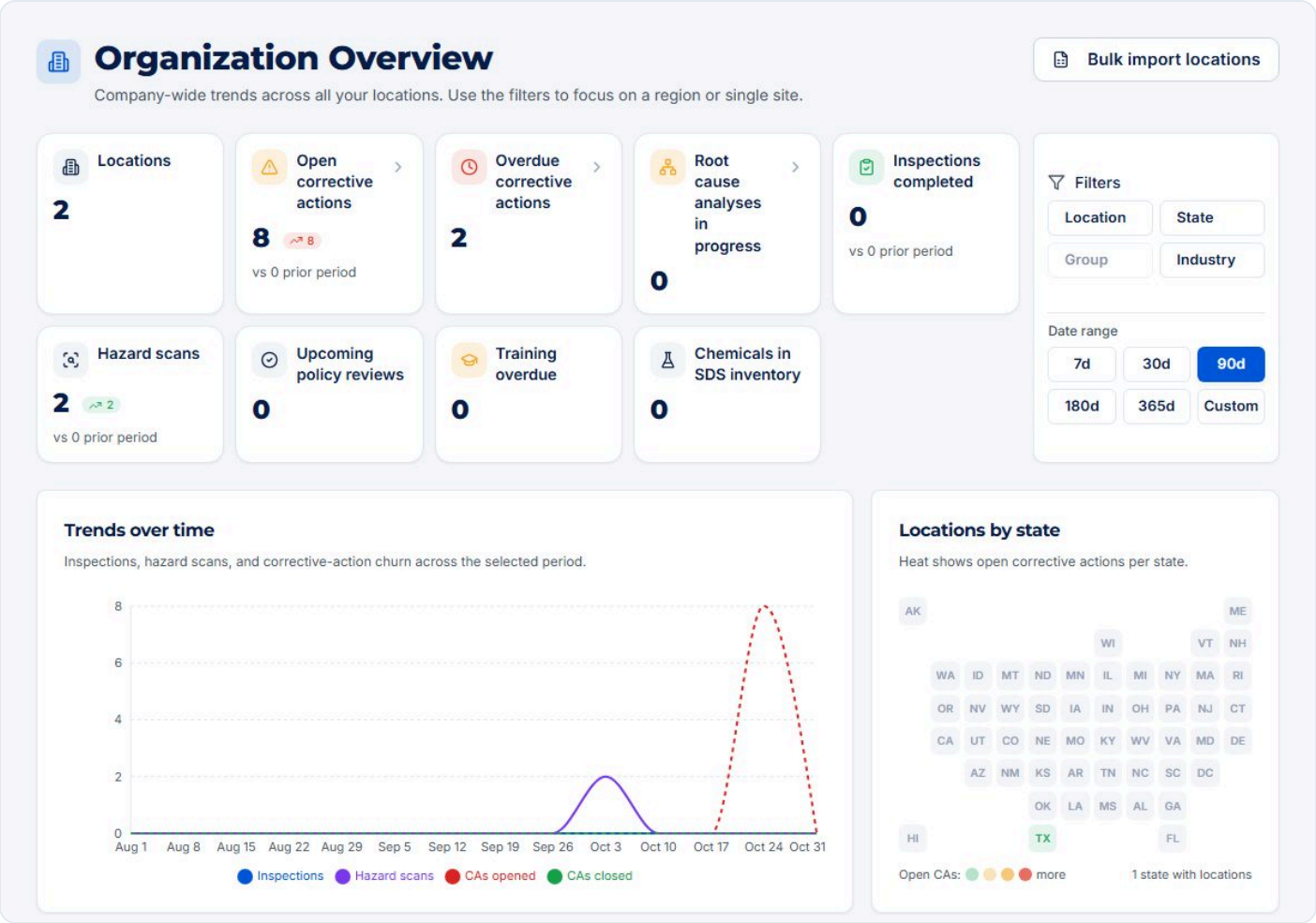
1 What the Organization Dashboard does

A single site's dashboard answers "how are we doing here?" The Organization Dashboard answers "where across all our locations do I need to look first?"

It is the page you land on after signing in, as soon as the organization has at least one completed location. Until then, you see the setup screens instead. The page is titled **Organization Overview**, with the line *Company-wide trends across all your locations. Use the filters to focus on a region or single site.*

Owners and admins see every location. Everyone else sees the rollup for the locations they have been given, which is covered in section 8.

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Sign in → Dashboard (Organization Overview)
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Organization Overview. Tiles on the left, filters on the right. Every number on the page responds to the filters.

FIELD USERS SEE A SMALLER HOME

Some seats are field-only. Those users land on a reduced home screen without the organization-wide widgets. This is a seat setting; ask your ShieldSphere contact if someone is on the wrong one.

2 Words you'll see

WORD	WHAT IT MEANS
Location	One site in your organization. A site is a profile in ShieldSphere, and the page counts only operational locations. Corporate umbrella entries and consultant client containers are left out.
Group	A free-text label you attach to locations, such as a region or division, so you can filter by it.
Location code	Your own site identifier, such as WH-042. It must be unique and appears next to the site name when you assign people to locations.
Open corrective actions	Actions raised from any module that are not yet closed.
Overdue	Open actions whose due date has passed.
DART rate	Cases with days away, restricted work or job transfer, per 100 full-time employees.
TCIR	Total recordable cases per 100 full-time employees.
Establishment info	The hours worked and average employees entered for a site's 300A. The rates need it.

3 Read the Organization Overview

The KPI tiles

Nine tiles sit at the top. Most show a change against the previous period.

TILE	WHERE IT TAKES YOU WHEN CLICKED
Locations	No link.
Open corrective actions	The organization-wide Corrective Actions page.
Overdue corrective actions	The same page, already filtered to overdue.
Root cause analyses in progress	The Incidents page.
Inspections completed	No link.
Hazard scans	No link.
Upcoming policy reviews	No link.
Training overdue	No link.
Chemicals in SDS inventory	No link.

Below the tiles

Trends over time

A chart of Inspections, Hazard scans, CAs opened and CAs closed across the selected period. The buckets (days, weeks or months) adjust to the date range so it stays readable.

Locations by state

A map of the United States where the heat shows open corrective actions per state. Canadian locations are not on this map.

Proactive Insights

When your organization has it, a feed of organization-wide insights appears here. See the Proactive Insights guide.

OSHA 300A, Organization-wide

A summary card, covered in section 6. It only appears if your plan includes the Incidents module.

Locations

A table of every location that matches the filters, with its state, industry, group, open and overdue actions, inspections, overdue training and last activity.

The Locations table

The columns are **Location**, **State**, **Industry**, **Group**, **Open CAs**, **Overdue**, **Inspections**, **Training overdue** and **Last activity**. Click a column heading to sort by it, and click again to reverse the order. Click a location's name to open that site's own overview.

4 Filter the rollup

The **Filters** card narrows every tile, the chart, the map and the table at once. The address updates as you filter, so you can bookmark or share a filtered view.

1

Pick what to focus on

Four drop-downs each take several choices: **Location**, **State**, **Group** and **Industry**. After you choose some, the button shows how many, for example *State (3)*. A **Clear** link inside each list empties just that filter.

2

Set the date range

Under **Date range**, choose **7d**, **30d**, **90d**, **180d** or **365d**. For anything else press **Custom**, enter a **From** and **To** date and press **Apply**. Apply stays disabled until From is earlier than To.

3 Reset

When any filter is active a count such as *2 active* appears next to **Filters**, with a **Clear** button that removes the location, state, group and industry filters together.

> **MAKE GROUPS WORK FOR YOU**
>
> The Group filter only helps if locations carry a group. Fill in **location_group** when you bulk import (section 7), using labels like "West Coast" or "Distribution", and your regional managers get one-click views.

> **DATES APPLY TO ACTIVITY, NOT TO OPEN ITEMS**
>
> Open and overdue corrective actions are counts of what is open right now, so they do not change when you move the date range. Counts of things done, such as inspections and scans, do.

5 Corrective actions and incidents across locations

Corrective Actions, all sites

Click **Open corrective actions** or **Overdue corrective actions** on the overview to reach **Corrective Actions**, described as *Open and in-progress action items across every location and module*. Four tiles summarize it: **Open**, **Overdue**, **Due in 30 days** and **Unassigned**.

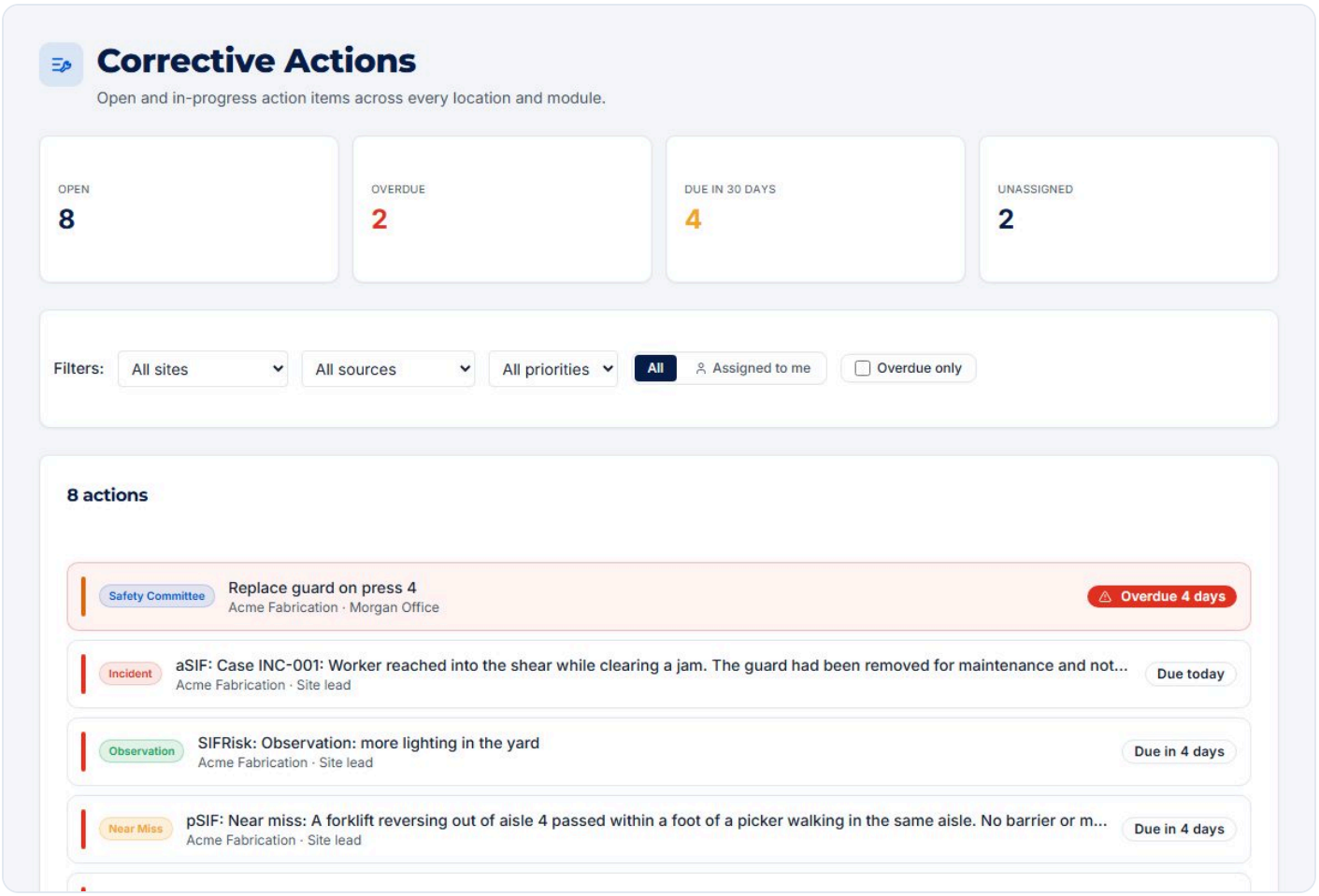
Narrow the list with the **Filters** row:

FILTER	CHOICES
Site	All sites, or one site.
Source	Where the action came from: Inspection, ZeroState, Incident, Near Miss, Hazard Scan, Manual, Observation or Safety Committee.
Priority	Critical, High, Medium or Low.
All / Assigned to me	Everyone's actions, or only yours.
Overdue only	A checkbox.

Each row shows its source, priority bar, location and due status. Click a row to open that site's corrective actions to work the item. A **Clear** button resets the filters. The page needs the Corrective Actions module; without it you see an upgrade notice. For working the actions themselves, see the Corrective Actions guide.

Incidents, all sites

The **Incidents** page covers *OSHA 300 Log, 301 Incident Reports, and 300A Annual Summary* and has a **year** selector and a **site** filter. With no site chosen it shows the sites you can reach together. Choosing a site opens that site's own Incidents page. Its tabs are **Incidents**, **Trends**, **OSHA 300 Log**, **OSHA 301**, **300A Summary**, **Near Misses** and **Root Cause**. The Incidents module is part of the Growth plan; on a plan without it the tabs appear greyed out behind an upgrade banner. See the Incidents guide.



One list for every site. Filter by site, source or priority, or tick Overdue only to build a catch-up list.

6 Organization-wide OSHA 300 and 300A

The **OSHA 300A, Organization-wide** card on the overview adds up recordable injuries and illnesses across all locations for a year. Pick the year in its drop-down and press **View full 300/300A** for the full page.

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Organization Overview → OSHA 300A card → View full 300/300A
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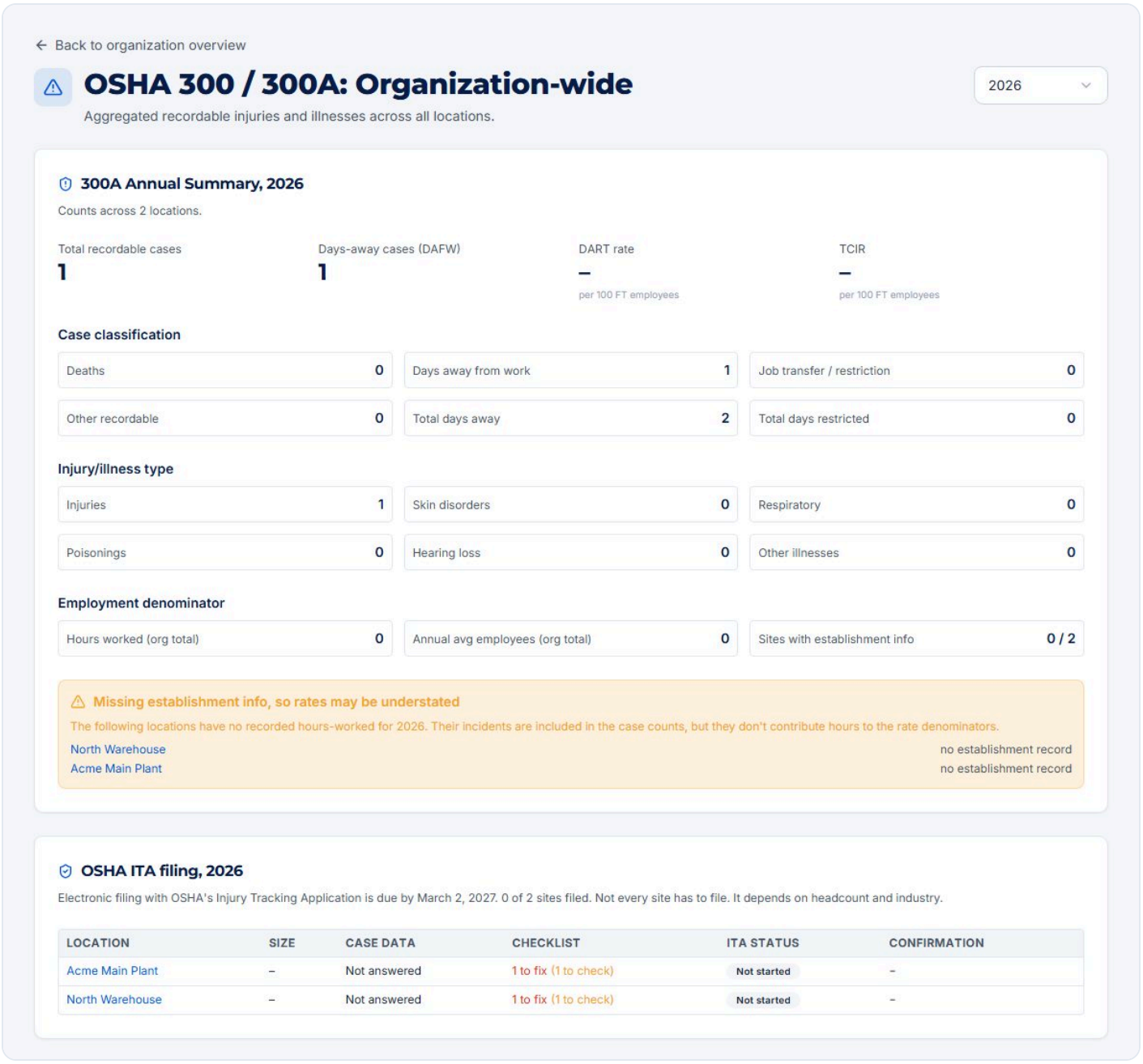
The full page is titled **OSHA 300 / 300A: Organization-wide**. It has these parts:

- **300A Annual Summary.** The headline numbers are **Total recordable cases**, **Days-away cases (DAFW)**, **DART rate** and **TCIR** (per 100 FT employees). Below them are the case classification (deaths, days away, job transfer or restriction, other recordable, total days away and restricted),

the injury and illness type, and the **employment denominator**: hours worked, annual average employees, and *Sites with establishment info* as a count such as 8 / 10.

- **Missing establishment info.** A warning lists any location with no hours recorded for the year. Their cases are counted, but their hours are not, so the rates may be understated. Each name links to that site's establishment form. Fill those in and the rates become complete.
- **OSHA ITA filing.** A table with one row per site: **Location**, **Size**, **Case data**, **Checklist**, **ITA status** and **Confirmation**. Click a location to go to its 300A tab. See the OSHA ITA guide.
- **300 Log.** Every recorded case for the year, grouped by location, with case number, employee, job title, classification, outcome and days.

> **HOW THE RATES ARE WORKED OUT**
>
> The rates are sums of the parts, not averages of site rates. DART is days-away and job-transfer-or-restriction cases times 200,000, divided by total hours worked. TCIR is all recordable cases times 200,000, divided by total hours worked.



> **The rollup.** The warning names every site whose hours are missing, so you know which rates to trust.

7 Bulk import locations

Adding forty sites one by one is the wrong way to start. Bulk import creates them all from one spreadsheet. Only **owners and admins** can use it; anyone else sees **Admin access required**.

`Organization Overview → Bulk import locations`

1 Download the template

Press **Download CSV template**. It has a header row and an example row. Do not rename or add columns, because unknown or duplicate columns are rejected.

COLUMN	WHAT GOES IN IT
profile_name	Required. The location's name. Names must not repeat those already in your organization.
employee_count	Required. A positive whole number.
street_address, city, state, zip	Required. State is a two-letter code.
contact_name, contact_email	Required. The site contact.
industry	Optional. Leave blank to set it later, or type something close and the importer suggests the right value.
states	Optional. Several operating states, separated by a pipe character.
location_group	Optional. A label for grouping, such as "West Coast".
location_code	Optional. Your own site identifier. It must be unique and is shown when you assign people to specific sites.

2 Upload the file

Drop the CSV onto **Drop your CSV here or click to browse**, or press **Choose file**. Only .csv files are accepted, with up to 1,000 rows and 5 MB per upload.

3 Fix anything it flags

Every row is checked before anything is created. If a single row is wrong, **nothing is imported**, and you get a table of **Column** and **Issue** to fix. Correct the file and press **Try again**.

4 Check the result

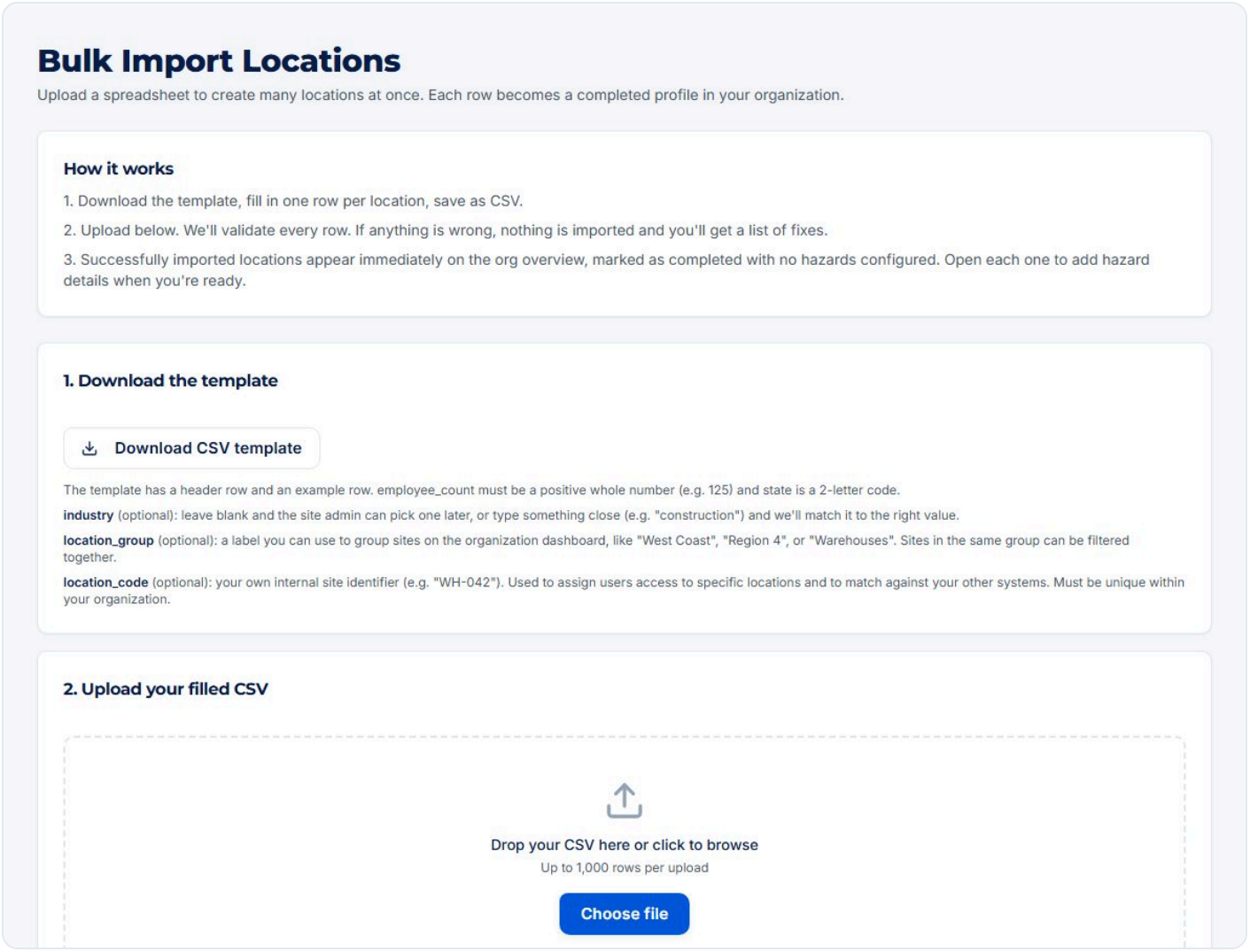
On success you see **Imported N locations** and a **View dashboard** button. The new locations are live on the overview straight away, marked completed but with no hazards set up yet. Open each one to add hazard details when you are ready.

YOUR PLAN'S SITE LIMIT APPLIES

If the import would take you past the number of sites your plan allows, it is refused with a message showing the count. Remove rows or ask your ShieldSphere contact about your plan.

UNDOING AN IMPORT

There is no undo button. Open an imported location from the dashboard and edit or delete it like any other site.



Bulk import. Download the template, fill in one row per location, drop the file on the page.

8 How site access limits what a person sees

Every rollup on this page is built from the sites the signed-in person can reach, not from the whole organization. That is how a regional manager gets a regional dashboard.

PERSON	WHAT THEY SEE ON THE ORGANIZATION DASHBOARD
Owner or Admin	Every location in the organization.
Member or Viewer	Only the locations they were assigned. The tiles, chart, map, table, corrective actions, incident lists and the OSHA rollup all add up those sites only.
A member with no sites yet	A message to contact the administrator, because they were invited without sites.

Assign sites when you invite someone, or later with **Assign locations** on the Team page. If you choose to assign later, the person sees nothing until you do. See the Team guide.

> **TOTALS DIFFER BY PERSON, ON PURPOSE**
>
> A manager assigned to three sites sees three sites' DART rate, not the company's. If two people quote different totals, compare their site lists first.

Owners and admins can see imported locations right away. Members only see them once you add them to their access. Using a **location_code** makes the right sites easy to find in the list.

9 Troubleshooting

WHAT YOU SEE	WHAT TO DO
The page shows setup steps, not the overview	The organization has no completed location yet. Finish a profile or bulk import locations.
A location is missing from the table	Check the filters for an active count. If none, the person may not be assigned to that site, or it is a corporate or consultant-client entry, which the overview leaves out.
A Canadian site is missing from the state map	The map shows U.S. states only. The site still appears in the Locations table.
The OSHA 300A card is not there	Your plan does not include the Incidents module. Ask your ShieldSphere contact.
The rates look too low	Look for the missing establishment info warning. Those sites' cases count but their hours do not, so the rates may be understated.
Bulk import says Admin access required	Only owners and admins can import. Ask one to run it.
Bulk import returns a list of issues	Nothing was imported. Fix each row named in the table and upload again.
Import refused over a site limit	The message gives the count. Remove rows or ask about your plan.

ShieldSphere Organization Dashboard – Admin Guide. Published at shieldspheresafety.com/guides/organization-dashboard-admin. Screens are illustrative; the written steps are what to follow if the two ever disagree.