

Policies

administrator setup & configuration

How to generate written safety programs, grade an existing manual against OSHA, and manage saved policies, versions and formatting.

Version 1.0

Admin Guide · for administrators

Screens captured July 2026

Administrators generate written safety programs in ShieldSphere by answering a short site-specific intake; the platform writes the program cited to the federal and state standards it must answer to, then grades it with an AI compliance review. You can also upload an existing manual to be graded against OSHA, and manage saved policies and their versions.

WHAT'S IN THIS GUIDE

- 1 Generate a policy
- 2 Grade an existing manual
- 3 Manage saved policies
- 4 Troubleshooting

START HERE

This Administrator Guide covers creating and managing written safety programs. For browsing and reading policies, see the companion **ShieldSphere Policies User Guide**.

1 Generate a policy

Answer a short intake and ShieldSphere writes the program for your operation, cited to the standards it must answer to.

Policies → select a program → **Generate Policy**

The screenshot displays the ShieldSphere web application interface. On the left is a dark blue sidebar with the 'TSG Safety' logo and user information 'Signed in as Matt Thompson'. The sidebar menu includes 'Organization Overview', 'CURRENT PROFILE Demo Company', and a 'WORKSPACE' section with items like 'Site Overview', 'Compliance', 'AI Hazard Scanner', 'AI Job Hazard Analysis', 'AI Ergonomic Evaluation', 'Inspect', 'Incidents', 'SDS', 'ZeroState', 'Assets', 'Policies' (highlighted), 'Toolbox Talks', 'Trends', and 'Log out'. The main content area is divided into two panels. The left panel, titled 'RECOMMENDED FOR MANUFACTURING', lists various safety topics with status indicators: 'Emergency Action Plan' (Done), 'Hazard Communication (HazCom)' (Policy on File), 'Fire Prevention/Extinguisher Training' (Policy on File), 'Respiratory Protection' (In Progress), 'Fall Protection (General Industry)' (In Progress), 'Bloodborne Pathogens/First Aid' (Not Started), 'Hearing Conservation' (Not Started), 'Control of Hazardous Energy (Lockout...)' (Not Started), 'Personal Protective Equipment (PPE)' (Policy on File), 'Powered Industrial Trucks (Forklift) Sa...' (Not Started), 'Ergonomics/Manual Material Handling' (Not Started), 'Compressed Gas Cylinder Safety' (Not Started), 'Welding, Cutting, and Hot Work' (Not Started), and 'Electrical Safety (General Industry)' (Not Started). The right panel, titled 'Emergency Action Plan', shows the 'Intake Complete' status, a description of the policy, and a list of applicable regulations (e.g., CA: 8 CCR §1637, CA: 8 CCR §3203, CA: 8 CCR §3203(a)(7) + §1637, CA: 8 CCR §3220, CA: 8 CCR §3221). It includes buttons for 'Edit Intake' and 'Generate Policy'. Below this is an 'AI REVIEW' section showing '50% compliant' as of May 26, 2026, with a 'View report →' link and a 'Re-analyze with new file' button.

Program detail. Complete the intake, then **Generate Policy**. Every finished policy is graded by the **AI review**, and **Re-analyze with new file** re-scores it after an edit.

1 Complete the intake

Select a program and answer its **intake** - the site-specific questions that make the policy yours rather than a template. **Edit Intake** reopens those answers later.

2 Generate and review

Click **Generate Policy**. ShieldSphere writes the program against the federal and state citations shown, then runs an **AI review** that grades it for compliance. Open **View report** to see where it is strong and where it needs work.

ITERATE TO A HIGHER GRADE

Treat the first grade as a draft score. Improve the policy, re-analyze, and watch the percentage climb - **Past analyses** keeps the history so you can show the improvement.

2 Grade an existing manual

Already have a safety manual? Use the **Have an existing safety manual?** option at the top of the module to upload a PDF or Word document. ShieldSphere identifies every OSHA program the manual covers and grades each one against federal and state requirements.

ONE MANUAL OR ONE POLICY PER HAZARD

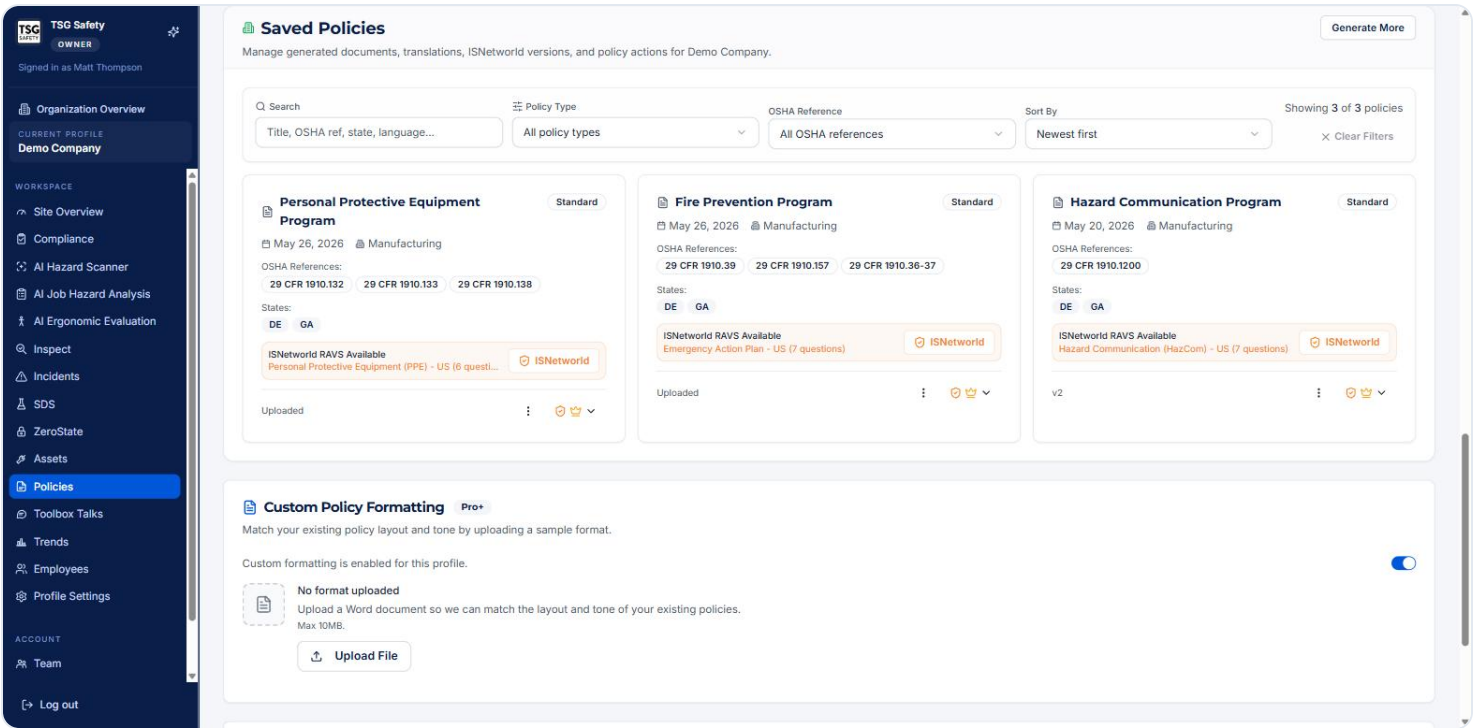
Uploading a manual is the right move when your programs live in a single omnibus document.

Generating per-program is better when you want a discrete, separately graded policy for each hazard.

You can mix both.

3 Manage saved policies

The **Saved Policies** section is where finished documents are managed - versions, translations, ISNetworld RAVS versions, and per-policy actions.



Saved Policies. **Generate More** adds documents; each card carries its OSHA references, states, version and an ISNetworld option. **Custom Policy Formatting** matches new policies to your existing layout and tone.

CONTROL	WHAT IT DOES
Generate More	Produce additional documents, translations or ISNetworld versions.
ISNetworld	Produce or open the ISNetworld RAVS version a client's prequalification requires.
Custom Policy Formatting	Upload a sample Word document so generated policies match your existing layout and tone (a Pro+ feature).
Per-policy menu	Version, translate, download or otherwise act on an individual saved policy.

4 Troubleshooting

SYMPTOM	CAUSE AND FIX
Generate Policy is unavailable	The intake is incomplete. Finish the intake questions first.
The grade did not change after an edit	Re-run it with Re-analyze with new file - the score reflects the last analyzed version.
Generated policies do not match our house style	Turn on Custom Policy Formatting and upload a sample document.
A client needs an ISNetworld RAVS version	Use the ISNetworld action on the saved policy to produce it.
The uploaded manual missed a program	Generate that program separately - manual grading covers what the document contains.

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Screens captured from the live application in July 2026 using a demonstration site. Your screens will show your own data. For browsing and reading policies, see the companion **Policies User Guide**. Generated policies are drafts to review, not legal advice - have a qualified professional approve them. Because ShieldSphere ships changes regularly, check the version above against the current release before circulating this guide widely.