SHIELDSPHERE

Proactive Insights

the pattern, before it becomes the incident

How to read the insight cards on your Organization Overview and site overviews, see the evidence and the exact records behind each one, jump to the right place to act, and clear a card once you have dealt with it.

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

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> ShieldSphere's Proactive Insights watches your inspections, corrective actions, incidents, training and asset checks every day and puts a card on your overview when it spots a pattern, such as overdue actions piling up or the same hazard repeating. Each card shows the evidence and the records behind it, with a link to act.

1 What Proactive Insights does

A safety manager cannot read every record every day. Insights read them for you and say out loud what is bunching up.

Once a day, ShieldSphere checks the data you already keep for a fixed set of patterns. When one is found, it appears as a card. The check itself is rule based: it counts records against thresholds, so a card only appears when the numbers are there. The short plain-language explanation on the card is written by AI from those exact numbers, and the card carries an AI-generated label to say so. If the AI writer is unavailable, the card falls back to a standard sentence built from the same figures.

`Overview → Proactive Insights card`

You will find the same panel in two places:

Organization Overview

Insights from across your locations, grouped by location, with organization-wide insights first.

Site overview

One location's insights, plus any organization-wide ones, in a single list.

WHO CAN USE IT

Proactive Insights is included on the Growth and Enterprise plans. If it is not on your plan, the panel simply does not appear, and opening an insight link shows a message that it is a Growth feature. You only see insights for locations you have access to. To have it switched on, ask your ShieldSphere contact.

2 Words you'll see

WORD	WHAT IT MEANS
Critical	Red. The pattern is large or old enough to need attention first.
Attention	Amber. Worth acting on soon.
Good news	Blue. The lowest level. It covers improvements, such as fewer recordable incidents than last year, and also a few gentle nudges described in section 3.
Why this surfaced	The numbers and rule that triggered the card.
Records	The specific corrective actions, incidents, assets or other items that make up the pattern.
Done	You have acted on it. The card leaves your list.
Dismiss	You do not want to act on it. The card leaves your list.

3 What produces an insight

Each kind of insight is a specific pattern with a threshold. The cards read plainly, and the thresholds are listed here so you know why one appeared or did not.

PATTERN	WHEN IT FIRES
Overdue corrective actions	Three or more open actions past due at one location, or any one action more than 30 days late. Critical at five or more, or when the oldest is over 45 days late.
Repeat hazard	The same hazard group recorded at least three times in 90 days at one location, across inspection findings and AI Hazard Scanner scans together. Critical at 20 or more.
Near misses without follow-up	Near misses between 14 and 180 days old with no corrective action raised from them. Critical at three or more.
Assets overdue for a check	Assets past the check cadence set on each asset. Critical at five or more.
Training expirations bunching	Three or more training records expiring within 30 days at one location. Critical at eight or more.
Training expiring with nothing scheduled	Three or more records on one topic expiring within 30 days, with no training session open or scheduled to cover that topic.
Training has gone quiet	A location that has run training sessions before has held none for 14 days. Shown at the lowest level.
Unlinked attendees	A training session closed in the last 7 days still has attendees who are not linked to an employee, so they have no training record. Shown at the lowest level.
Same injury, repeatedly	Two or more injuries of the same nature at one location in 30 days. Critical at four or more.
Seasonal incident pattern	A month that was a high-incident month last year is coming up. Needs at least 13 months of incident history and at least two incidents in that month last year.
Incident trend	Recordable incidents so far this year compared with the same period last year, once last year had at least three and the change is at least 30 percent. An increase is Attention. A

	decrease is shown as Good news, so you have a win to report upward.
Contractor worked without a JHA	A contractor signed in on three or more days in the last 14 without a Job Hazard Analysis on file for those days. Critical at five or more.
Serious injury items open	If your organization uses SIF classification: confirmed serious injury or fatality events in the last 30 days, and conditions still open. Critical when any such event exists or three or more are open.

A pattern that is still true next period produces a fresh card, and the newer card replaces the older one. You will not see two cards for the same situation.

> **NEWER ORGANIZATIONS SEE FEWER CARDS, ON PURPOSE**
>
> Insights that need history, like the seasonal pattern, stay quiet until you have enough. The training-quiet card only appears for a location and an organization that have already closed at least one training session. A quiet panel means nothing met a threshold.

4 Read a card and its evidence

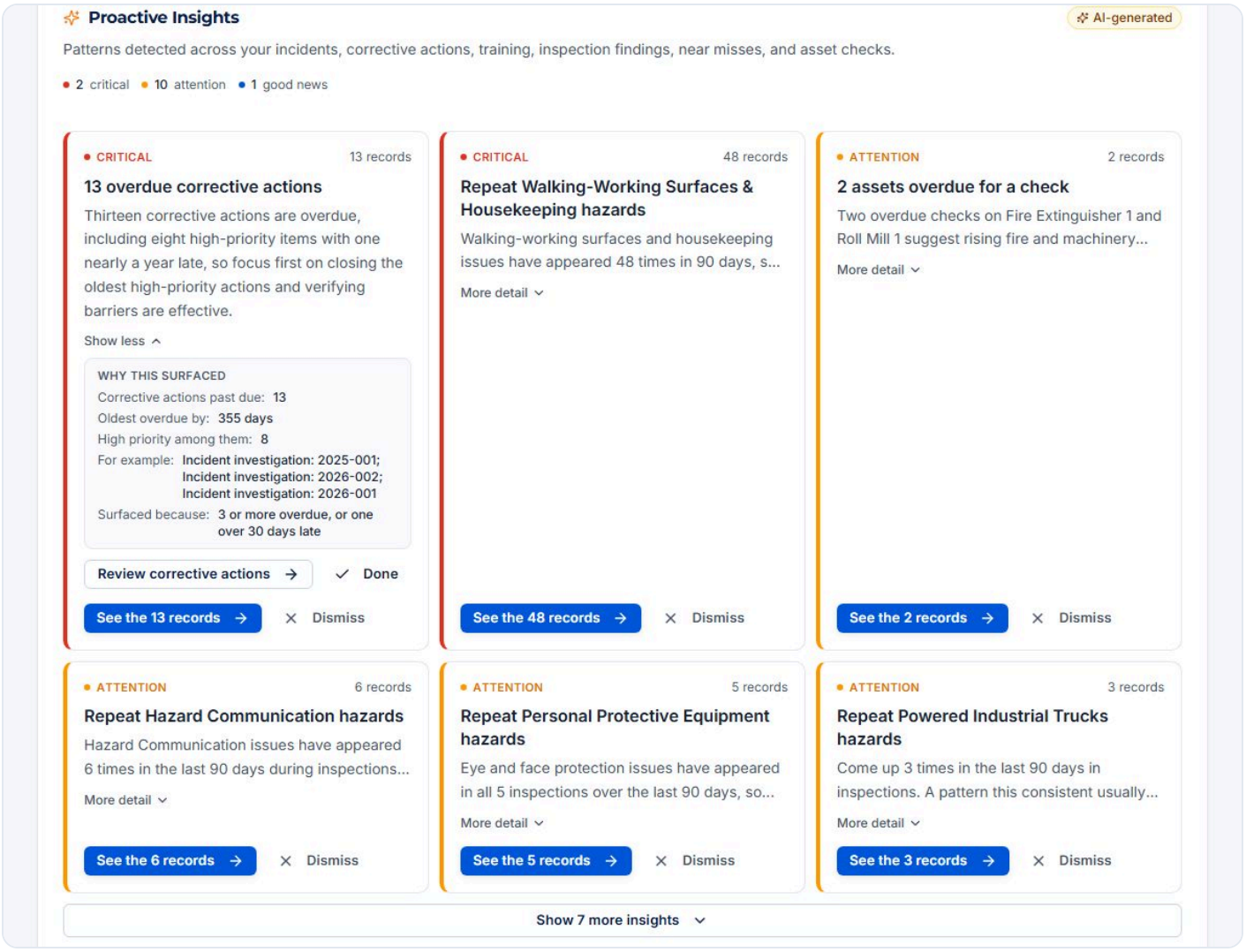
Cards are sorted so the most severe come first. Six show at once, and a button such as **Show 4 more insights** reveals the rest, with **Show fewer** to collapse again. A header line counts how many are critical, attention and good news.

1 Read the face of the card

Each card shows its severity, a title, a two-line explanation, and a record count such as *12 records*, or *25 of 31 records* when more contributed than are listed.

2 Open More detail

More detail expands the card to show the full text and a **Why this surfaced** box. It lists the numbers behind the card, for example how many actions are past due, how many days late the oldest is, and the rule that triggered it.



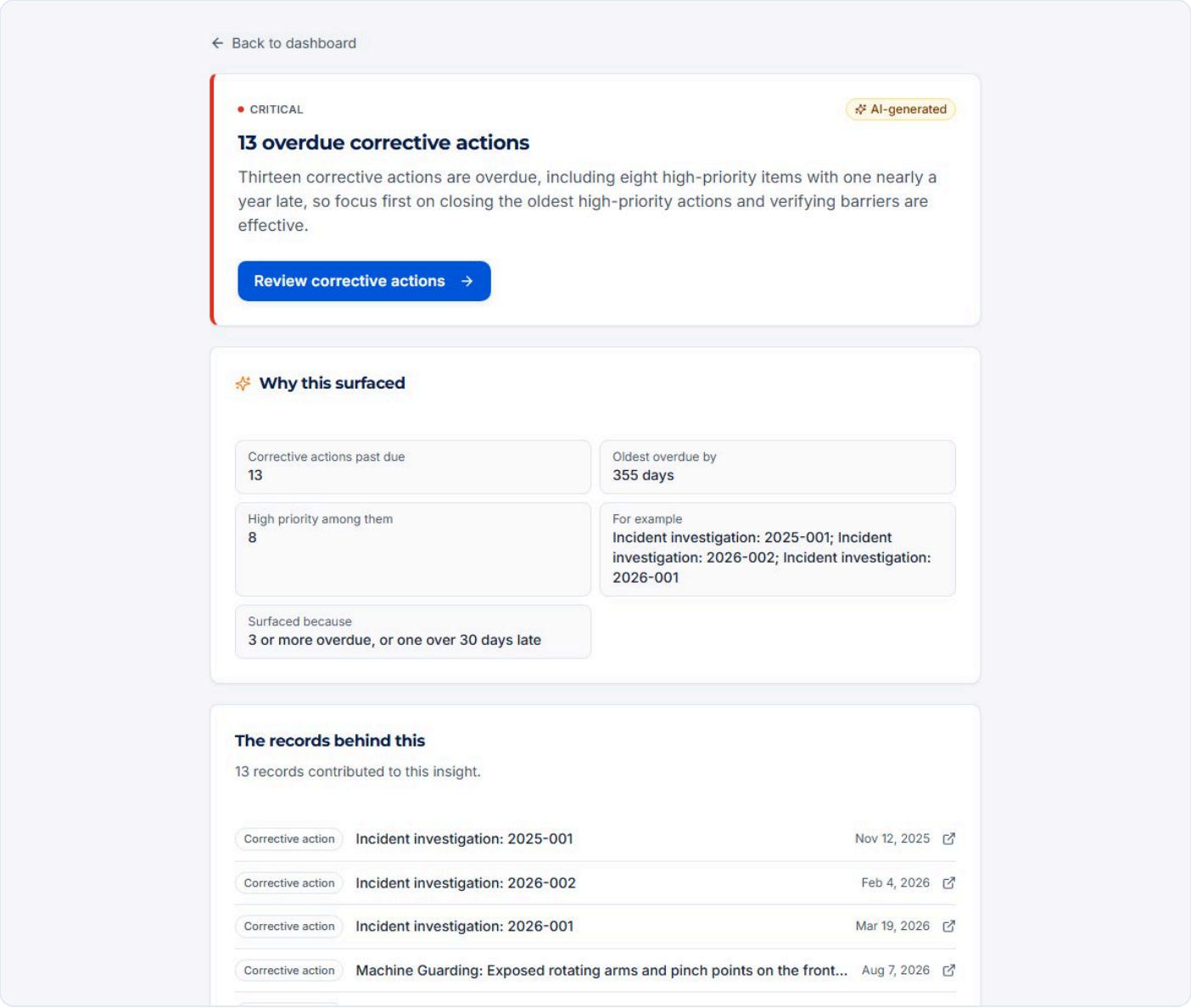
> **Reading a card.** More detail opens the Why this surfaced box, which gives the numbers behind the pattern and the rule that raised it.

5 The records behind an insight

When a card has records, its main button reads **See the 12 records** (the number matches the records it will list). It opens the insight's own page, which has three parts:

- The title, severity and full explanation, with a button to the right place in ShieldSphere to act, for example **Review corrective actions**.
- **Why this surfaced**, as a set of labeled figures.
- **The records behind this**, a list of each item with a type tag (such as Corrective action or Asset), its name, a date, and a link to open that record. A line says whether you are seeing all of them or, for example, *Showing 25 of the 27 records that contributed to this insight*.

A **Back to dashboard** link at the top returns you to the overview. The page keeps working after you clear the card, so a link you saved or shared still opens.



The records behind an insight. Each row links to the record that counted toward the pattern.

6 What to do with an insight

An insight is a prompt to look, not an order. Work through it in this sequence.

1 Check the evidence

Open the records and confirm the pattern is real. Records link straight to the item, so you can check each one.

2 Go where the fix happens

Use the action button on the card or the insight page. Where it goes depends on the pattern:

Overdue corrective actions	The site's Corrective Actions list. See the Corrective Actions guide.
Training expirations	The site's Employees page.
Training with nothing scheduled, or gone quiet	The site's Training sessions tab, to schedule or run a session.
Repeat hazard	The matching section of Trends, with the category highlighted where it can be.
Near misses or seasonal incidents	The site's Incidents page.
Assets overdue	The site's Assets page.
Unlinked attendees	That one training session, to link the names.

Some patterns, such as the organization-wide incident trend, have no single destination, and their cards have no action button.

3 Clear the card

On the face of the card, **Dismiss** removes it with the message *Insight dismissed*. Inside **More detail**, **Done** marks it as acted on. Both take the card off your list, and your name and the time are recorded. Use Done when you handled it and Dismiss when it is not worth acting on.

> **CLEARING A CARD IS SHARED**
>
> A card you mark Done or Dismiss goes away for everyone in your organization who can see that location, not just for you. If the same pattern is still true when the next period starts, a new card can appear. Fixing the underlying records is what stops it coming back.

> **GOOD NEWS IS WORTH REPORTING**
>
> When a card reports an improvement, such as fewer recordable incidents than last year, use it in your management report before you clear it.

7 The email digest

If you would rather not check the overview, ShieldSphere can email a summary of new insights across your locations. It goes to owners and admins. Insights always stay visible in the app whether or not you use the digest.

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Settings → Notifications → Proactive Insights Digest
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Turn the digest on or off there, and choose a **Frequency** of Daily, Weekly, Monthly or Annually. The frequency control is available only while the digest is on.

8 Troubleshooting

WHAT YOU SEE	WHAT TO DO
No Proactive Insights panel at all	It is not included on your plan, or has not been switched on. Ask your ShieldSphere contact.
"Nothing needs your attention right now"	No pattern met a threshold. The check runs daily, so cards appear on their own.
"Proactive Insights is a Growth feature."	You opened an insight link on a plan without it.
"This insight could not be found. It may have been removed."	The link is wrong, or you do not have access to that location.
A card says 25 of 31 records	The page lists up to 25 records per insight. The count in the title is the full total.
A card has no action button	That pattern has no single place to fix it. Use the records or the matching module.
A card came back after I dismissed it	The pattern was still true in a new period and produced a new card. Resolve the underlying records.
A card was labeled "Good news" but is not good news	The lowest level is used for reminders too, such as training that has gone quiet. Read the title rather than the color label.
I do not receive the digest	The digest goes to owners and admins only. Check it is on under Notifications.

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