

Resources

one shared library, every version kept for audits

How to run your organization's shared safety file library: tags, single and bulk upload, versioning with full history, archive-instead-of-delete, and read-only sharing to the employee portal.

USER GUIDE – FOR EVERYDAY USERS

VERSION 1.0

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The ShieldSphere Resource Library is an organization-wide home for shared safety files - policies, SOPs, permits, training materials. Admins upload and tag documents (singly or hundreds at once); everyone in the organization and, optionally, employee portal users can search and download them. Replacing a file keeps every prior version retrievable, and nothing is ever deleted - only archived.

1 What the Resource Library is

Your organization's shared safety files and policies - with the audit posture built in: replacing a file keeps every prior version available.

Dashboard → [Resources](#)

Resources

Your organization's shared safety files and policies. Replacing a file keeps every prior version available for audits.

 Upload files

Library  Archived

 Search title or filename...

All tags 

Title 	Tags 	Updated 	Size 	Actions
Warehouse 1 - 05	—	Aug 4, 2026	3.7 MB	...
Warehouse 1 - 07	—	Aug 4, 2026	4.3 MB	...
Warehouse 1 - Extra 01	—	Aug 4, 2026	3.8 MB	...
Warehouse 1 - 06	—	Aug 4, 2026	3.4 MB	...
Warehouse 1 - 03	—	Aug 4, 2026	3.1 MB	...
Warehouse 1 - 02	—	Aug 4, 2026	3.0 MB	...
Warehouse 1 - 01	—	Aug 4, 2026	2.9 MB	...
Warehouse Safety	Policy	Aug 4, 2026	43 KB	...
Powered Industrial Trucks	—	Aug 4, 2026	45 KB	...
Personal Protective Equipment	—	Aug 4, 2026	41 KB	...
Ladder Safety Program	—	Aug 4, 2026	43 KB	...
Machine Guarding	—	Aug 4, 2026	42 KB	...
Heat Illness Prevention	—	Aug 4, 2026	39 KB	...
Hazard Communication Program	—	Aug 4, 2026	278 KB	...
Hazard Communication - Chemical Inventory List	—	Aug 4, 2026	12 KB	...
Hazard Communication - Chemical Purchase Review Form	—	Aug 4, 2026	12 KB	...
Hand and Power Tools	—	Aug 4, 2026	44 KB	...
Fire and Life Safety	—	Aug 4, 2026	46 KB	...
Fleet and Driver Safety	—	Aug 4, 2026	48 KB	...
Forklift Driver Evaluation	—	Aug 4, 2026	15 KB	...
Accident Investigation Program	—	Aug 4, 2026	43 KB	...
Electrical and Equipment Safety	—	Aug 4, 2026	43 KB	...
Crane Safety Program	—	Aug 4, 2026	51 KB	...
Control of Hazardous Energy (LOTO)	—	Aug 4, 2026	46 KB	...
Emergency Action Plan	Policy	Aug 4, 2026	43 KB	...

The library. One organization-wide table - search, a tag filter, sortable columns, and a kebab menu of actions per row.

The library is organization-wide: one collection, visible to every member of your organization, and optionally to employees through the portal. It is built around three promises:

- **Nothing is ever deleted.** There is no delete button anywhere in the module - for anyone. Documents are archived instead, and archived documents stay viewable, downloadable, and restorable.
- **Every version is kept.** Replacing a file moves the old one into version history, where it remains downloadable for audits.

- **Files are private.** Documents live in private storage; every open or download uses a short-lived signed link. There are no public URLs.

Org admins

Upload, replace, edit titles and tags, archive and restore, manage the tag presets, and see the Archived view.

Org members and portal users

Search, filter, open, and download. Members can also open any document's version history; portal access is read-only current files.

AVAILABILITY

The Resource Library is an organization add-on rather than a standard tier feature. If you do not see **Resources** in your sidebar, contact ShieldSphere to enable it for your organization.

2 Setting up tags ADMIN

Tags are the library's one organizing axis - and they are preset-only, so "SOP", "sop", and "S.O.P." can never become three different tags.

Account Settings → **Resource Tags**

Create your tag presets before the first big upload - a few broad categories like **Policy, SOP, Training, Permit** go a long way. There is deliberately no free-form tag entry in the upload or edit dialogs; if a tag does not exist yet, an admin adds it here first.

Resource Tags

The preset tags your team can apply to Resource Library documents. Renaming a tag updates every document using it.

[+ Add tag](#)

Inspection Checklist



Policy



SOP



Training



Preset tags. Renaming updates every document using the tag; deleting keeps the documents and just untags them.

ACTION

BEHAVIOR

Create

Tag names are unique per organization (case-insensitive), up to 50 characters.

Rename

Documents reference tags directly, so a rename updates everywhere the tag appears - no re-tagging needed.

Delete

Documents using the tag are kept - they just become untagged. The confirmation says so, and the result reports how many documents were untagged.

3 Uploading files ADMIN

One dialog for one file or six hundred - drop them in, tag the batch, and retry only what fails.

1

Pick the files

Drag files onto the drop zone or click to browse - select as many as you like. Accepted types: PDF, Word (.doc/.docx), Excel (.xls/.xlsx), PowerPoint (.ppt/.pptx), PNG, and JPEG, each up to **25 MB**. Files that are oversized or an unsupported type are skipped at pick time, with a toast reporting how many were skipped.

2

Tag the batch

The **Tags** row applies to every file in the upload. Titles default to each file's name - so name files well before uploading. Both are editable afterwards, per document, via **Edit title / tags**.

3

Upload - and retry failures only

Files upload several at a time with a per-row spinner, check, or error icon. If any fail (a dropped connection, for example), the primary button becomes **Retry failed (N)** and re-uploads only those. Large selections are processed in batches automatically.

Upload files ×

PDF, Word, Excel, PowerPoint, PNG, or JPG up to 25 MB each. Select as many as you need — titles default to the filename and can be edited afterward.



Drag files here or click to browse

 New-Hire-Safety-Orientation.pdf ×

 Respirator-Cleaning-SOP.pdf ×

Tags (applied to every file in this upload)

Inspection Checklist Policy SOP ☒ Training

Cancel Upload 2 files

Batch upload. Every file in the upload gets the selected tags; titles default to the filenames and can be edited per document afterward.

BULK MIGRATIONS

Moving an existing shared drive into the library? Upload in batches grouped by category, so each batch's shared tag set lands correctly - different tag sets need separate uploads or per-document edits afterwards.

4 Finding, opening, and downloading

Search matches titles and filenames; one tag filter narrows the list; every column sorts.

The library table shows **Title**, **Tags**, **Updated**, and **Size**. Use the search box ("Search title or filename...") for a case-insensitive match on either, and the tag dropdown to filter to one tag - or to **Untagged** to find documents that still need categorizing. Click a column header to sort; click again to flip the direction.

Open

Clicking a document's title opens it in a new tab - PDFs and images render in the browser; Word, Excel, and PowerPoint files download instead.

Download

The row's **Download** action forces a download with the original filename, whatever the file type.

SIGNED LINKS

Opens and downloads use short-lived signed links (about 5 minutes). If a link you copied earlier stops working, just open or download again from the library - fresh links are issued every time.

5 Replacing files - versioning

Replace is the versioning action: the new file becomes current, the old one becomes read-only history, and both stay downloadable.

1

Replace the file ADMIN

From the row menu choose **Replace file**. The dialog takes exactly one file, pre-fills the current title, and pre-selects the current tags - adjust either if the new revision warrants it. On save, the current file moves to version history.

2

View version history

Any org member can choose **Version history** from the row menu: every version, newest first, with file name, upload date and time, who uploaded it, size, a **Current** badge on the live version, and a download button per row - the audit retrieval path.

File	Uploaded	By	Size
Heat Illness Prevention.docx	Aug 4, 2026 2:31 PM	Matt Thompson	39 KB

Nothing is lost. Every version ever uploaded stays listed and downloadable - the Current badge marks the live one.

HISTORY IS IMMUTABLE

Superseded versions are read-only history - they cannot be edited, re-titled, or replaced. And an archived document cannot be replaced; restore it first.

6 Archiving and restoring ADMIN

Retire a document without losing it - archived files leave the library view but never the record.

From the row menu choose **Archive**. The confirmation says it plainly: the document moves out of the library but is never deleted - you can view, download, or restore it from the **Archived** view at any time. Admins switch between **Library** and **Archived** with the tabs above the table; the Archived view offers **Restore** per row.

WHO SEES THE ARCHIVE

The Archived view is admin-only. Members and portal users see only current, non-archived documents - so archiving is also how you unpublish a document from the portal without destroying it.

NO DELETE - BY DESIGN

There is no hard-delete path in this module, for anyone, including admins. That is the audit posture: a document that once circulated can always be produced later.

7 Sharing to the employee portal

Give field employees the current library - read-only, searchable, and always the live version.

Portal users with the **Resources** portal module enabled see the library at their portal under a "Resources" tile: search, tag filter, sort, open, and download - nothing else. They always see the organization-wide set of current, non-archived documents; superseded versions and the archive are not exposed.

Profiles → [profile] → Settings → **Portal modules** → Resources

Visibility is controlled per profile with the portal module toggle - it defaults to on wherever the library add-on is enabled, and turning it off hides the tile for that profile's portal users.

THE PORTAL ALWAYS SHOWS CURRENT

Because portal users always get the current version, replacing a file is how you push an update to the field - no re-sharing step. Post the new revision via **Replace file** and every portal download from that moment is the new one.

8 Troubleshooting

SYMPTOM	CAUSE AND FIX
No Resources link in the sidebar	The Resource Library add-on is not enabled for your organization. Contact ShieldSphere to enable it.
No Upload button, no Archived tab	You are an org member, not an admin. Uploading, replacing, editing, archiving, tag management, and the Archived view are admin-only.
Some files never appeared after a big upload	Oversized or unsupported files are skipped at pick time (the toast reports a count, not names). Check that each missing file is PDF, Office, PNG, or JPEG and 25 MB or less, then re-upload it.
The tag I want is not in the list	Tags are preset-only. An admin adds it under Account Settings → Resource Tags, then it is available in upload and edit dialogs.
Replace file is missing on a document	The document is archived - restore it first - or you are looking at a superseded version in history, which is immutable.
A saved link to a document stopped working	Open and download links are signed and expire after about 5 minutes. Share the library page, not the file link; anyone with access gets a fresh link on click.
Portal users cannot see the Resources tile	Either the profile's Resources portal module toggle is off, or the organization's library add-on is disabled. Both must be on.
A filename looks different from what was uploaded	Filenames are sanitized for storage - unusual characters become underscores. The document title is independent and freely editable.

ShieldSphere Resources – User Guide. Published at shieldspheresafety.com/guides/resources-user. Screens are illustrative; the written steps are what to follow if the two ever disagree.