

ZeroState

administrator setup & configuration

How to build a machine-specific lockout/tagout procedure step by step, finalize and publish it, and manage the procedures at your site.

Version 1.0

Admin Guide · for administrators

Screens captured July 2026

Administrators build lockout/tagout procedures in ShieldSphere's ZeroState Procedure Builder, a five-step wizard covering Equipment, Field Notes, Energy Sources, Personnel and Review, with the draft autosaving throughout. Finalizing publishes the procedure so the floor can follow it. Finding, following and inspecting published procedures is covered in the ZeroState User Guide.

WHAT'S IN THIS GUIDE

- 1 Build a procedure
- 2 Finalize and publish
- 3 Manage procedures
- 4 Troubleshooting

START HERE

This Administrator Guide covers building and managing lockout/tagout procedures. For finding, following and inspecting published procedures, see the companion **ShieldSphere ZeroState User Guide**.

1 Build a procedure

The builder walks you through a machine-specific lockout/tagout procedure in five steps, so nothing OSHA asks for gets left out.

ZeroState → [New Procedure](#)

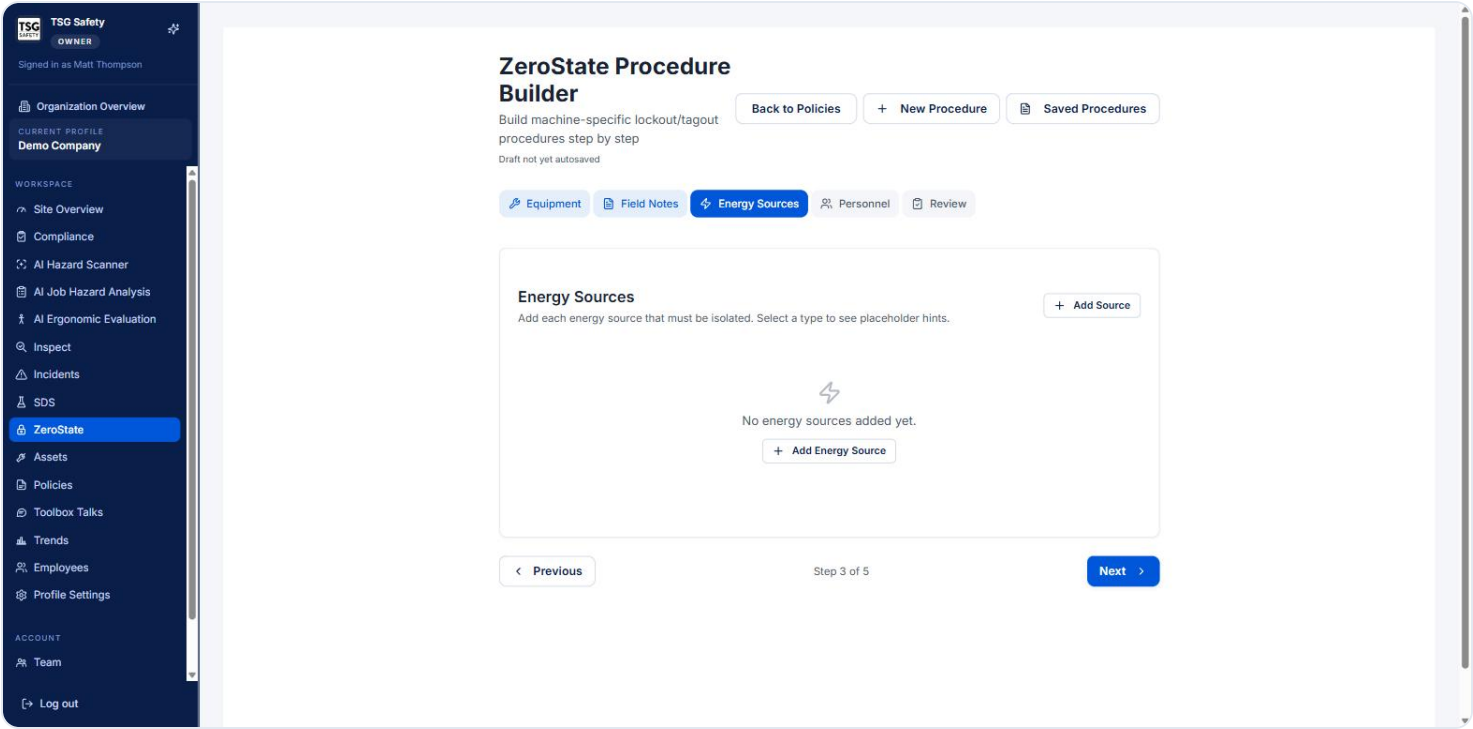
The **ZeroState Procedure Builder** is a five-step wizard - *Equipment, Field Notes, Energy Sources, Personnel, Review* - with your draft autosaving as you go.

The screenshot displays the ZeroState Procedure Builder interface. On the left is a dark sidebar with navigation links: TSC Safety, Organization Overview, CURRENT PROFILE (Demo Company), WORKSPACE (Site Overview, Compliance, AI Hazard Scanner, AI Job Hazard Analysis, AI Ergonomic Evaluation, Inspect, Incidents, SDS, ZeroState, Assets, Policies, Toolbox Talks, Trends, Employees, Profile Settings), and ACCOUNT (Team, Log out). The main content area is titled 'ZeroState Procedure Builder' and includes buttons for 'Back to Policies', '+ New Procedure', and 'Saved Procedures'. Below these are tabs for 'Equipment', 'Field Notes', 'Energy Sources', 'Personnel', and 'Review'. The 'Equipment' tab is active, showing a form with the following sections: 'Equipment Info' (Profile: Demo Company), 'Machine Name' (Hydraulic Press #3) and 'Machine / Equipment ID or Asset Tag' (HP-003), 'Physical Location' (Custom location dropdown), a note to 'Apply one of this profile's saved location presets or enter a custom location below.' with a text input 'Building A, Bay 4', 'Brief Machine Description' (200-ton hydraulic press used for metal stamping operations. Has electrical, hydraulic, and pneumatic energy sources.), and 'Equipment Photos' (Upload one or more photos showing the overall equipment. These will appear in the exported procedure document.) with a dashed box and camera icon for uploads.

Step 1 - Equipment. Machine name, equipment or asset ID, physical location (a saved preset or custom), a brief description, and equipment photos that appear in the exported document.

The five steps

STEP	WHAT YOU ENTER
Equipment	What the machine is, where it lives, and photos of it.
Field Notes	Context and hazards specific to this machine that the procedure should reflect.
Energy Sources	Every source that must be isolated, its isolation point, and the lockout method.
Personnel	The authorized employees and reviewer named on the procedure.
Review	A final read of the assembled procedure before you publish it.



Step 3 - Energy Sources. Add each source that must be isolated. Selecting a type surfaces placeholder hints for the isolation point and method, so the steps are written correctly.

ENERGY SOURCES DRIVE THE STEPS

The lockout and verification steps in the finished procedure are generated from the energy sources you list here. Get every source and its isolation point right at this step and the procedure writes itself around them.

2 Finalize and publish

On the **Review** step, check the assembled procedure - energy sources, steps, personnel, PPE - then publish it. A published procedure is marked **Final** and carries an **effective date** and a **reviewer**.

FINAL IS WHAT MAKES IT USABLE

Only **finalized** procedures can be run against a periodic inspection and appear to end users as in-force. A draft is invisible to the people who need to follow it - publish it once it is right.

Finalizing also starts the clock on the annual periodic inspection: the tracker sets the next inspection one year from the effective date, or from the most recent inspection once one is recorded.

3 Manage procedures

From an open procedure, the buttons across the top handle its whole life after publishing:

CONTROL	WHAT IT DOES
Reopen & Edit	Unlock a final procedure to change steps, energy sources or personnel, then re-publish.
Copy to Profile	Clone the procedure to another site - the fast way to stand up a similar machine elsewhere.
Move to Profile	Reassign the procedure to a different site when it was built under the wrong one.
Download PDF / DOCX	Export the procedure to print and post, or to edit in Word.

CHANGING A LIVE PROCEDURE

Reopening a final procedure to edit it is how you keep a machine's lockout current when the equipment or its isolation points change. Re-publish it as soon as the edit is done so the floor is never following an out-of-date procedure.

4 Troubleshooting

SYMPTOM	CAUSE AND FIX
My procedure will not appear for inspection	It is still a draft. Finish the Review step and publish it - only finalized procedures can be inspected.
The generated steps are missing a lockout	An energy source was not added. Go back to the Energy Sources step and add every source and its isolation point.
I need to update a published procedure	Use Reopen & Edit , make the change, and re-publish. Do not leave it reopened.
The same machine exists at another site	Use Copy to Profile and adjust the copy rather than rebuilding from scratch.