

# **IndustrySafe Subscription Service**

## **Quick Start Set-Up Guide**



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# IndustrySafe Quick Start Set-Up Guide

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There are 5 simple steps to set-up IndustrySafe:

1. Define Facility Profile
2. Populate the Employee Summary
3. Assign Usernames & Passwords (If Applicable)
4. Configure Dropdown menus
5. Internet Explorer Settings

The following sections will provide directions for each step. For more in-depth description of each feature please review the appropriate section of the online help.

### 1. Define Facility Profile

Our system uses a location hierarchical structure to provide and restrict access to records. For each facility the user must create a facility profile record, which is found in the System Functions module. Using the Facility Profile form, the user can identify your organization's hierarchy, facilities, name, address, insurance information and OSHA specific information. The facility dropdown menu, which is populated by the records entered into the Facility Profile, is used throughout the application. If you are using IndustrySafe at multiple locations, you may want to define your hierarchy first. More information on defining your hierarchy is available in on-line help.

Use the following steps to define your facilities:

#### **Quick Steps Example: Adding a Facility Profile**

1. Open any module by selecting a tab in the main menu.
2. On the vertical menu select **Facility Profile**
3. Under the **Facility Profile** select **Add Facility Profile**
4. A blank Facility Profile Form will appear.
5. Complete the appropriate fields, including the required fields.
6. Select the **Save** button.

### 2. Populate Employee Table

Once facilities are defined you should populate the employee table. The employee summary should be populated with all employees of your organization. Employees can either be populated one by one or in a batch by using the Employee Import Wizard. A single employee can be added from almost any module while the Employee Import wizard is located under set-up in System Functions. In order to import all your employees using the Employee Import Wizard, you will have to compile your employees into an excel spreadsheet. Populating the employee summary allows you to assign employees to training classes, link incidents to an employee's incident history, track an employee's class history and view an employee's basic information.

#### **Quick Steps Example: Adding a Single Employee**

1. Open any module by selecting a tab in the main menu.
2. On the vertical menu select **Employees**
3. Under the **Employees** select **Add Employee**
4. A blank Employee Information Form will appear.
5. Complete the appropriate fields, including the required fields.
6. Select the **Save** button.

#### **Quick Steps Example: Populating the Employee Table Using the Employee Import Wizard**

1. Open the System Functions module by selecting the **System Functions** tab in the main menu.
2. On the vertical menu select **Setup-Employee Import**
3. The Employee Import Wizard will appear.
4. Set up your employees in a excel file (according to sample file)
5. Save File (Mark down location of saved file)
6. Browse and select your saved File
7. Select **Continue**
8. Match column titles in your Excel spreadsheet with IndustrySafe column names
9. Select **Continue**
10. Confirm Field Matches and Select **Continue**
11. Verify import was successful
12. Open the **Training** Module by selecting **Training** tab in the main menu
13. On the vertical menu select Employee –your added employees should display in the Employee summary.

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### 3. Assign Usernames & Passwords

If you have subscribed for more than one user, you can assign Usernames and Passwords. This feature is available in the User Level Manager located in the System Functions module. Follow the following steps to add a user. Remember that standard usernames are the form of email address.

#### **Quick Steps Example: Adding a User**

1. Open the System Functions module by selecting the **System Functions** tab in the main menu.
2. On the vertical menu select **User Level Manager**, and then select **Add/Edit Users**
3. Enter the user's employee ID or search for the Employee's Name (note: users may be added even if they are not in the employee table by adding a guest employee and assigning all guest users to that employee ID.)
4. Enter the new user's email address for the username.
5. Enter the user's first name.
6. Enter the user's last name
7. Enter the user's password.
8. Confirm the user's password.
9. Enter the user's email address.
10. Assign the user a user level.
11. Assign the user a Facility.
12. Select the **Add User** button.

For more information about assigning usernames & passwords see the user level manager section of the online help manual.

### 4. Configure Dropdown menus

You can populate key dropdown menus with values unique to your organization such as department, root cause, body part, training location, section, location, streets, and incident type.

#### **Quick Steps Example: Editing a Dropdown menu**

1. Open the System Functions module by selecting the **System Functions** tab in the main menu.
2. On the vertical menu select **Set-Up**, then select **Edit Forms**.
3. In the Recording Form dropdown menu, select the Recording Form where the dropdown menu appears.
4. In the Section dropdown menu, select the Section where the field appears.
5. Find the field that has the dropdown menu you wish to edit. Select the Edit Dropdown menu link.
6. Select the **Add** button.
7. Enter the new value in the blank field and select the
8. Select the **Save** button.

The following is a list of dropdown menus that can be populated with values unique to your organization.

- **Incident Type:** The Incident Type dropdown menu should be populated with all of the incident types that you use within your organization. This menu is located on the New Incident form and the Incidents Summary page in the Incidents module.
- **Department:** The department dropdown menu should be populated with values that are relevant to your organization. For example, departments could be: Security, Maintenance, Safety, Operations, etc. This menu is used within the Incident Details section of the Employee, Supervisor, Safety and Security forms, the Basic Information section of the Safety Inspection, Hazard, Corrective Action, and Security Inspection form and in the Resolution & Responsibility section of the Corrective Action form.
- **Root Cause:** The Root Cause dropdown menu should be populated with Root Cause values that are typically identified in your incident investigation. The Supervisor Analysis section of the Supervisor Form and Incidents by Root Cause Dashboard uses this menu.
- **Body Part:** The Body Part dropdown menu should be populated with Body Parts that are typically injured during an employee injury. The Employee Injury section of the Supervisor Form and Incidents by Body Part Dashboard uses this menu.
- **Training Location:** The training location dropdown menu should be populated with all training locations. This menu is used for location of the training class located in the Class Roster section of the Training Class Schedule form.
- **Section:** The section dropdown menu is a dependent dropdown menu of facility, thus each value can be assigned to a specific facility or to all facilities. If a facility is identified only associated values will appear. All fields that use the location dropdown menu are disabled on all forms. If the fields were available the dropdown menu would be used in the Incident Details section of the Employee, Supervisor, Safety and Security forms. It would

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also be located in the Basic Information section of the Safety Inspection, Hazard, Corrective Action and Security Inspection form.

- **Location:** The location dropdown menu is a dependent dropdown menu of section, thus each value can be assigned to a specific section or to all sections. If a section is identified only associated location values will appear. All fields that use the location dropdown menu are disabled on all forms, unless it is made available. If the fields are available the dropdown menu would be used in the Incident Details section of the Employee, Supervisor, Safety and Security forms. It would also appear in the Basic Information section of the Safety Inspection, Hazard, Corrective Action and Security Inspection form.
- **Streets:** The streets dropdown menu should be populated with all streets where safety related incidents could occur. This menu is used for the "location on" and "location at" fields that appear in the Incident Details section of the Employee, Supervisor, Safety and Security forms.

In addition to the preceding dropdown menus, IndustrySafe is delivered with pre-configured dropdown menu. The system administrator is able to edit the dropdown menus. The following is a list of pre-configured dropdown menus:

- State
- Weather
- Lighting
- Vehicle Actions
- Collision Type
- Type of Person
- What Body Part Was Affect
- Cause Classification
- Type of Hazard
- Hazard Evaluation
- Training Class Category
- Training Delivery

For more information about editing dropdown menus please see the Edit a Dropdown menu section of the online help manual.

## 5. Internet Explorer Settings

The final step is verifying your Internet Explorer settings. To use IndustrySafe you must allow pop-up windows to appear. Most computer configurations allow you to adjust your pop-up settings. You can configure your pop-up settings to only allow pop-ups from the IndustrySafe website. To view reports you need to have Adobe Acrobat Reader. (Adobe Acrobat Reader can be installed for free from the Adobe website). See your IT system administrator if you are having difficult adjusting your settings.