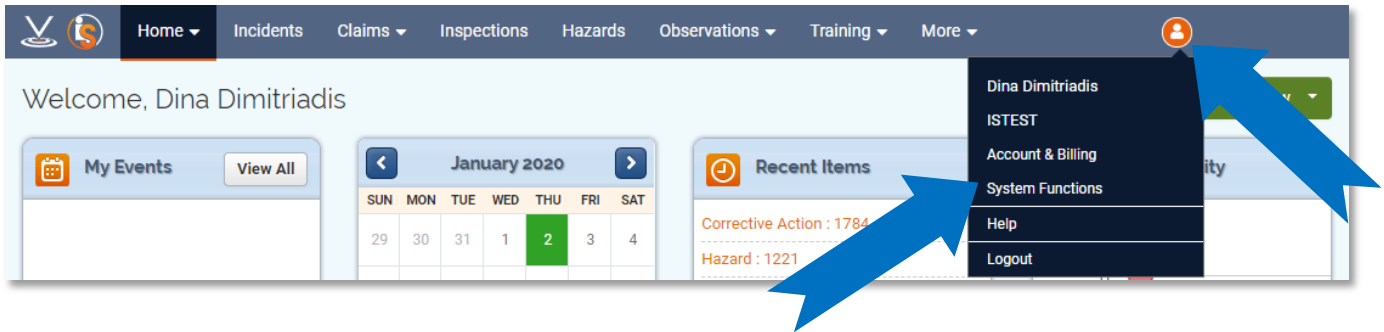


IndustrySafe Add Users and User Levels Guide

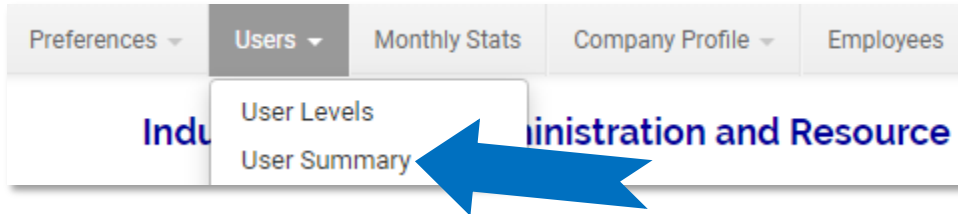
This guide describes the process for adding and editing users and user levels using the IndustrySafe Safety Management Software.

1 Adding a User

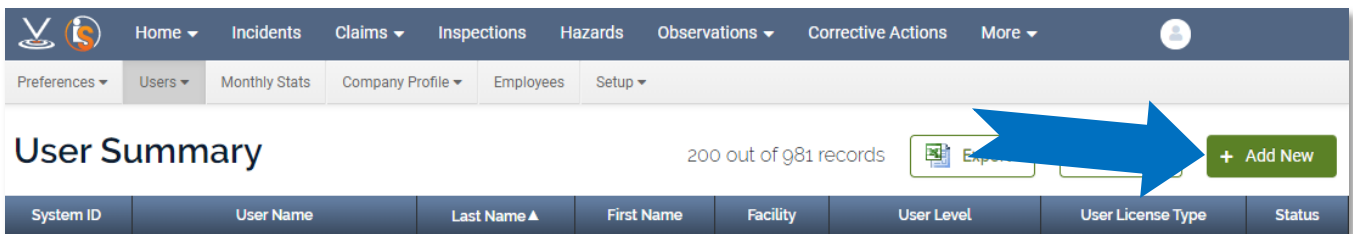
1.1 Click on the **Account Silhouette**, and then click on the **System Functions** option in the drop down.



1.2 Under **Users** in the horizontal menu bar, click the **User Summary** link.





1.3 In the User Summary page, you would then click on the **Add New** button located in the top right-hand corner of the page.




1.4 Complete the **Basic Information** section.

User Profile:

 Save  Print

[Basic Information](#) | [User Properties](#) | [History Section](#)

Basic Information
Top 

Employee ID	<input type="text"/>
Employee Name	<input type="text" value="Start typing name here"/>
User Name *	<input type="text"/>
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Date Created	<input type="text" value="1/2/2020"/>
Date Last Modified	<input type="text" value="1/2/2020"/>
Last Login Date	<input type="text"/>
E-Mail Address	<input type="text"/>

Note: If you search for the employee name, the Employee ID, User Name, First Name, Last Name, and Email Address will be automatically filled in. Linking a user to an employee record will also allow the system to auto fill fields like preparer and closer.

If the password field is left blank, a random password will be generated. The first time a user logs into IndustrySafe, they will be asked to change their password. After a new user is added, they are sent a "Welcome to IndustrySafe" email with their username and password and a link to the log in page.

1.5 Complete the **User Properties** section and click the **Save** button.

The screenshot shows the 'User Properties' form with the following fields and options:

- User Level ***: A dropdown menu.
- Additional User Properties**: Two checkboxes for 'Training Content Learner' and 'Training Content Trainer'.
- Division**: A dropdown menu with 'All' selected.
- Facility**: A dropdown menu with 'All' selected.
- Status**: A dropdown menu with 'Active' selected.
- User Language ***: A dropdown menu with 'English' selected.
- Reassign Event**: A green button labeled 'Reassign Event'.
- Reassign Task**: A green button labeled 'Reassign Task'.
- Buttons**: 'Save' and 'Print' buttons at the bottom left.

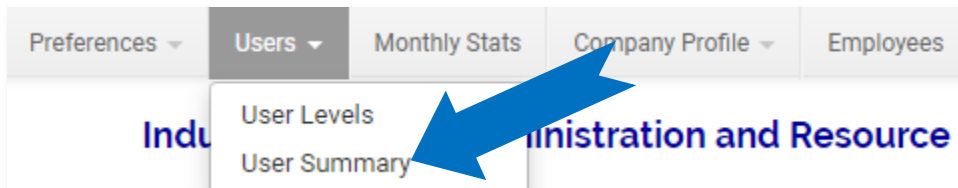
Note: The user level determines the permissions a user has to access modules (No Access, Read Only or Add/Edit; Delete; Close; Reopen; and Run Reports), and what email alerts they get.

If a user is restricted to a layer of the hierarchy, they may only add, modify, or view records with that same hierarchy. Users will only get email alerts about records at locations they have access to.

Once the form is saved, the user will be sent a "Welcome to IndustrySafe" email with their username and password and a link to the log in page.

2 Updating a User

2.1 Under **Users** in the horizontal menu bar, click the **User Summary** link.



2.2 Locate the user you wish to modify and click the **System ID** link.

User Summary 200 out of 981 records Export Search + Add New

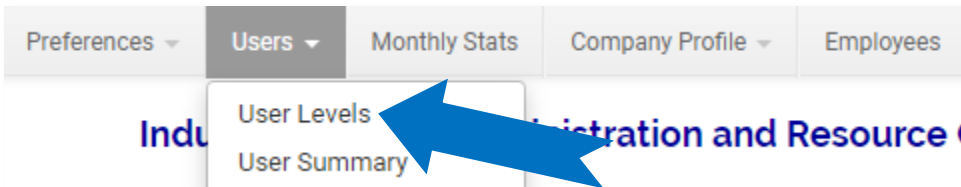
System ID	User Name	Last Name ▲	First Name	Facility	User Level	User License Type	Status
10701	emp00812@test.industrysafe.com	Abbott	Abigail	Facility F-113	Training Content Learners	Employee	Active
10521	kaho2039u@test.industysafe.com	Acevedo	Todd	All	Administrator	Administrator	Active
10099	user79@test.industrysafe.com	Acosta	Zavier	Facility F-014	Employee	Employee	Active
10801	emp00729@test.industrysafe.com	Adams	Clay	Facility F-030	Training Content Learners	Employee	Active
10802	emp00926@test.industrysafe.com	Adkins	Hayden	Facility F-028	Training Content Learners	Employee	Active
10803	0301@test.industrysafe.com	Aguilar	Karley	Facility F-000	Training Content Learners	Employee	Active
10804	@test.industrysafe.com	Aguirre	Irene	Facility F-175	Training Content Learners	Employee	Active
10361	emp00101@test.industrysafe.com	Alexander	Amaris	Facility F-115	Training Content Learners	Employee	Active

The user profile form will open. Update the user profile as desired and click the **Save** button.

3 Adding and Editing a User Level

User permissions in IndustrySafe are controlled by the user level assigned to the user.

3.1 Under **Users** in the horizontal menu bar, click the **User Levels** link.



3.2 To add a new user level, click the **Add** button, otherwise click the **Edit** link next to the user level you wish to modify.

Preferences ▾ Users ▾ Monthly Stats Company Profile ▾ Employees Setup ▾

Add/Edit User Levels

[Add](#) [Save](#)

User Level	User License Type	Status	
<input type="text" value="Administrative"/>	Administrator	Available ▾	Edit Delete
<input type="text" value="Employee"/>	Employee	Available ▾	Edit Delete
<input type="text" value="Incidents Only"/>	Employee	Available	Edit Delete
<input type="text" value="Inspections Only"/>	Employee	Available	Edit Delete
<input type="text" value="Manager"/>	Manager	Available ▾	Edit Delete
<input type="text" value="Read only"/>	Administrator	Available ▾	Edit Delete
<input type="text" value="Safety"/>	Manager	Available ▾	Edit Delete
<input type="text" value="TestLevel"/>	Manager	Available ▾	Edit Delete
<input type="text" value="Training Content Learners"/>	Employee	Disabled ▾	View

[Add](#) [Save](#)

4.3 Identify what global permissions this user level should include, what user roles pertain to this level, and what email alerts should be sent to users with this level.

Edit User Level Access

 Save  Back

User Level: Incidents Only

User License Type: **Employee** | [View User License Type Definitions](#)

Ability to Delete? No Yes

Ability to Reopen? No Yes

View incidents that are NOT work related? No Yes

Modify Corrective Action Assignment? No Yes

Ignore User Hierarchy Restrictions in the Dashboard? No Yes

User Roles Investigator Responsible Party Instructor HIPAA JSA Analyst [User Role Definition](#)

Email Alerts

Incident Email Alerts - [View Definitions](#)

- New Incident Alert 1
- Employee Injury Alert
- Incident Report In Progress
- OSHA Recordable Incident Alert
- Incident Report Ready for Approval
- Incident Update Alert
- Incident Report Complete
- Open Incident Summary Alert
- New Claim Alert
- New Hazard Alert

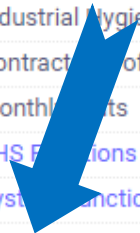
Recording Form	None	Read Only	Add/Edit	Close	View Reports
Home	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
New Incident Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	
Incidents - Employee Form	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Incidents - Incident Investigation	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incidents - OSHA Recordkeeping	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="checkbox"/>
Incidents - Safety Form	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Incidents - Security Form	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Incidents - Environmental Form	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Claims	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspections	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazards - Identification	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Hazards - Review	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observation Schedule	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Corrective Actions	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Users will only receive email alerts for Incidents, Claims, and Hazards at locations they have access to.

If the Investigator, Responsible Party, or Instructor User Roles are selected, users with this user level will be listed in the corresponding drop-down fields on the Inspection, Hazard, Corrective Action, and Training Class Schedule forms.

3.4 Identify the user permissions for each module and click the **Save** button.

Recording Form	None	Read Only	Add/Edit	Close	View Reports
Home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
New Incident Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	
Incidents - Employee Form	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Incidents - Incident Investigation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incidents - OSHA Recordkeeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="checkbox"/>
Incidents - Safety Form	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Incidents - Security Form	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Incidents - Environmental Form	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Claims	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazards - Identification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Hazards - Review	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observation Schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Corrective Actions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training - Class Catalog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Training - Class Schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
JSA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
JSA Hazards	<input type="radio"/>		<input type="radio"/>		
Employees - Basic Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Employees - Personal Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Industrial Hygiene - Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Industrial Hygiene - Monitoring and Assessments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract Profile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monthly Reports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
EHS Functions	<input type="radio"/>		<input type="radio"/>		
System Functions	<input type="radio"/>		<input type="radio"/>		<input type="checkbox"/>



Note: For each module or form listed, users may be given no access, read only access, or the ability to add and edit records. Users may also be given the ability to close records and view reports.

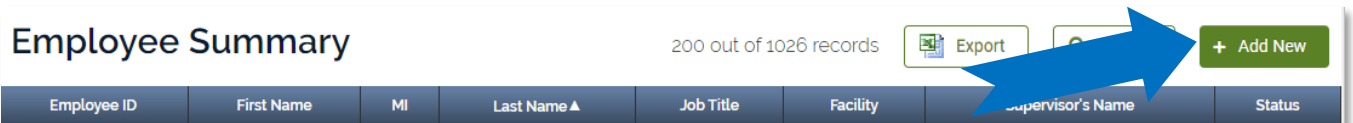
Users may only view, add, or edit records for locations they have access to.

4 Adding an Employee

4.1 Within **System Functions** click **Employees** from the horizontal menu bar menu.



4.2 Click on the green **Add New** button located on the top right-hand corner of the page.



4.3 Fill out the **Basic Information** section then click **Save**.

A screenshot of the 'Employee Personal Information' form. At the top left, there are three buttons: 'Save', 'Back', and 'Print'. A blue arrow points to the 'Save' button. The form is titled 'Basic Information | History Section'. Below the title is a dark blue header bar with 'Basic Information' and a 'Top' link. The form contains several input fields and dropdown menus for the following fields: Employee ID, First Name, Last Name, Facility, Team, Supervisor's ID Number, Supervisor's Name (with a placeholder 'Start typing name here'), Date Hired, Date Employee Started in Current Position, Date of Birth, Termination Date, Gender, Marital Status, Address, and Address 2. Each date field has a calendar icon next to it.

5 General Notes about IndustrySafe

- Fields with a red * are required.
- Ensure that your browser allows pop-ups from IndustrySafe. This is required for certain features such as printing reports and attaching supporting documents.
- You may save the form at any time to ensure that you do not lose your work (even if you have not completed all required fields).
- If you do not save or refresh the screen for 30 minutes you will be logged out due to inactivity. Upon automatic logout, any form that you may have open on the screen will be saved. A pop-up will alert you before this happens.
- Additional help may be obtained by clicking the Help icon within the navigation pane at the top of the screen.

