

# IndustrySafe Guide to Importing and Editing Inspection Checklist

This guide describes the process for uploading and editing inspection checklists using the IndustrySafe Safety Management Software.

## 1 Importing an Inspection Checklist

### 1.1 Prepare a checklist to import

Your checklist must be in an MS Excel (.xls) file containing the following columns:

- Name of the checklist (same for each item)
- Number of the checklist (same for each item)
- Topic of the checklist item (used to group checklist items)
- Standard/Reference Number for the checklist item
- Number of the checklist item (used to order the items in the checklist)
- Description of the checklist item
- Checklist item points (used for inspection scoring).
- Checklist item status definition (used for varying status checklist items)

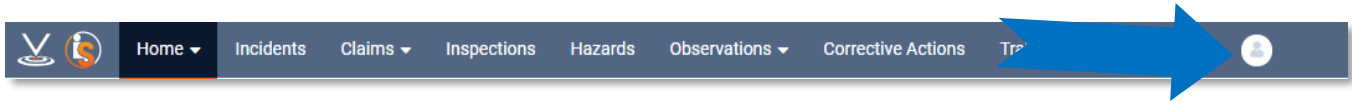
	A	B	C	D	E	F	G	H
1	Checklist Name	Checklist Number	Checklist Item Topic	Standard/Reference	Checklist Item Number	Checklist Item Description	Checklist Item Points	Checklist Item Status Values
2	Facility Inspection	10000	A. Topic 1		01	What is being inspection #1	100	
3	Facility Inspection	10000	A. Topic 1		02	What is being inspection #2	100	
4	Facility Inspection	10000	A. Topic 1		03	What is being inspection #3	100	
5	Facility Inspection	10000	A. Topic 1		04	What is being inspection #4	100	
6	Facility Inspection	10000	A. Topic 1		05	What is being inspection #5	100	
7	Facility Inspection	10000	A. Topic 1		06	What is being inspection #6	100	
8	Facility Inspection	10000	A. Topic 1		07	What is being inspection #7	100	
9	Facility Inspection	10000	A. Topic 1		08	What is being inspection #8	100	
10	Facility Inspection	10000	B. Topic 2		09	What is being inspection #9	100	
11	Facility Inspection	10000	B. Topic 2		10	What is being inspection #10	100	
12	Facility Inspection	10000	B. Topic 2		11	What is being inspection #11	100	
13	Facility Inspection	10000	B. Topic 2		12	What is being inspection #12	100	
14	Facility Inspection	10000	B. Topic 2		13	What is being inspection #13	100	
15	Facility Inspection	10000	B. Topic 2		14	What is being inspection #14	100	
16	Facility Inspection	10000	C. Topic 3		15	What is being inspection #15	100	
17	Facility Inspection	10000	C. Topic 3		16	What is being inspection #16	100	

Download a copy of the checklist import template:

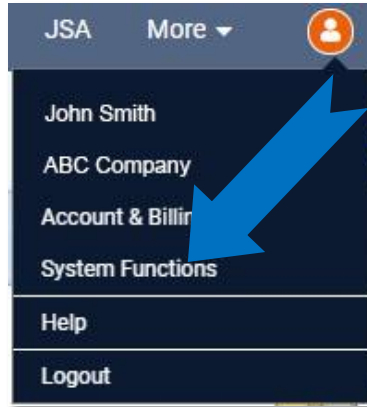
[>> Inspection Checklist Import Template](#)

**Note:** Save this file to your computer in a location that you will remember.

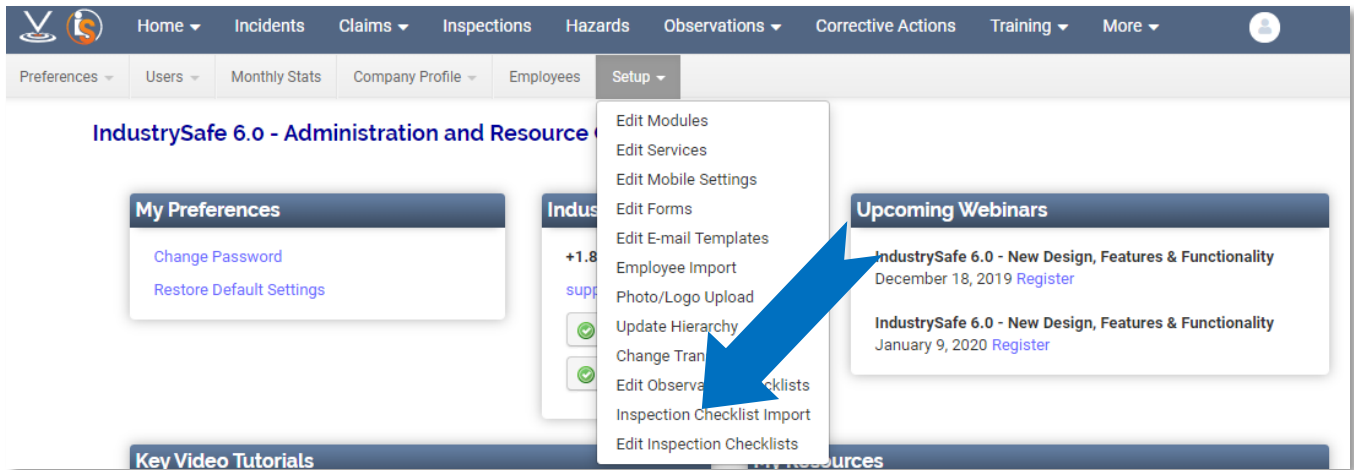
1.2 Click on the **Account Silhouette** icon in the horizontal menu bar.



1.3 Click on **Systems Function** option in the drop down.



1.4 Under **Setup** in the second-tier navigation menu, click the **Inspection Checklist Import** link.



- 1.5 Select a **Category** for the checklist, click the **Browse** button to locate the MS Excel file, and then click the **Continue** button.

**Checklist Import Wizard**

**Step 1 of 4: Import Checklists**

The Checklist Import Wizard allows you to import Safety Inspection Checklists. The Wizard allows you to add new checklists and update existing checklist information.

Follow these simple steps to import checklists:

[Continue](#)

1. Import your checklists into an Excel (.xls) document.  
You can only import 800 checklist items in a single import
2. Ensure that each column has a header row and all data is on Sheet 1  
[Download Sample File for Excel Document](#)
3. Identify the Category  
Safety Inspections
4. Now choose the Excel file you wish to import into IndustrySafe.  
Note: it may take a few minutes to upload your file, depending on the file size and your connection speed.  
Choose File sample\_data...rt\_demo.xls

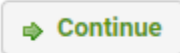
\* = Required

[Continue](#)

- 1.6 Match the columns from your Excel file with the IndustrySafe checklist fields and click the **Continue** button.

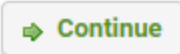
**Checklist Import Wizard**

**Step 2 of 4: Match Checklist Fields to Excel Columns**

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Checklists Field	Excel Column
Checklist Name *	Checklist Name ▼
Checklist Number *	Checklist Number ▼
Topic	Checklist Item Topic ▼
Standard/Reference Number *	Standard/Reference ▼
Checklist Item Number *	Checklist Item Number ▼
Checklist Item Description *	Checklist Item Description ▼
Item Points	Checklist Item Points ▼
Item Status Values	Checklist Item Status Values ▼

\* = Required

 Continue

- 1.7 Verify your selections and click the **Continue** button. To change your selections, click the **Edit Matches** button.

**Checklist Import Wizard**  
**Step 3 of 4: Confirm Field Matches**

All existing data will be overwritten. This action cannot be undone.  
 Are you sure you want to perform the import?

Checklists Field	Excel Column
Checklist Number *	Checklist Number ▼
Checklist Name *	Checklist Name ▼
Topic (Optional)	Checklist Item Topic ▼
Standard/Reference Number *	Standard/Reference ▼
Checklist Item Number *	Checklist Item Number ▼
Checklist Item Description	Checklist Item Description ▼
Checklist Item Points	Checklist Item Points ▼
Checklist Item Status Values	Checklist Item Status Values ▼

\* = Required

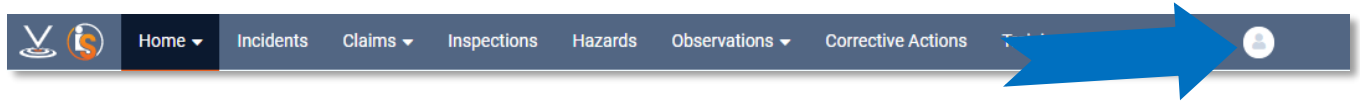
- 1.8 Your checklist will be imported and a summary of the import will be displayed.

**Checklist Import Wizard**  
**Step 4 of 4: Import Confirmation**

Category	Safety Inspections
Number of Rows Inserted (Main)	1
Number of Rows Inserted (Child)	16
Number of Excel Rows Processed	16
Number of Excel Columns Imported	8
Error on Excel Row Number(s)	
# of Excel Rows with Errors	0

## 2 Modifying an Inspection Checklist

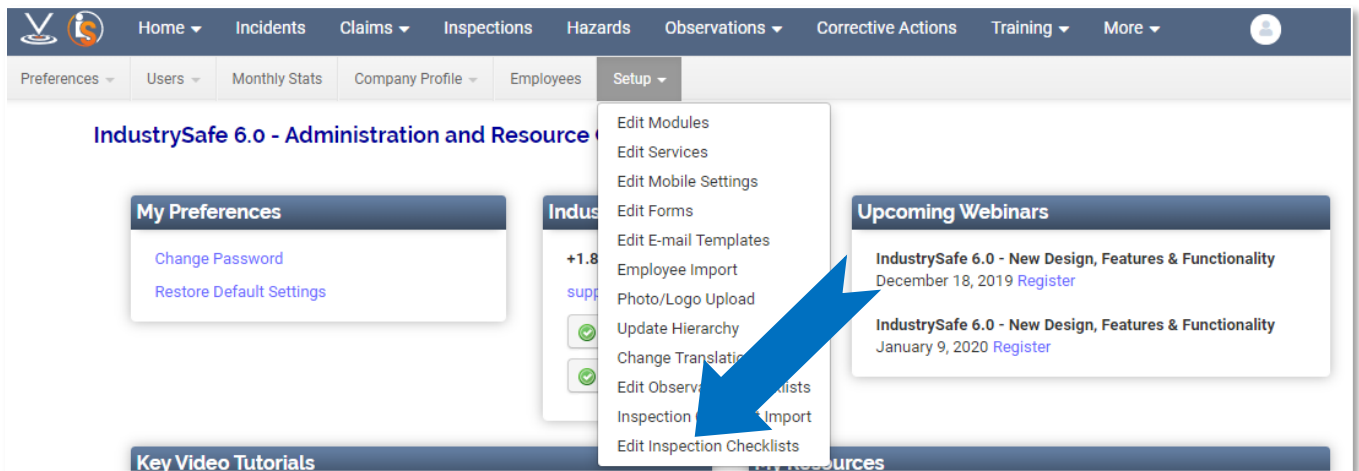
2.1 Click on the **Account Silhouette** icon in the horizontal menu bar.



2.2 Click on the **Systems Functions** option in the drop down.



2.3 Under **Setup** in the second-tier navigation menu, click the **Edit Inspection Checklist** link.



2.4 Select the **Category** and **Name** of the checklist you wish to modify.

The screenshot shows the 'Edit Checklists' interface. At the top, there are navigation tabs: Preferences, Users, Monthly Stats, Company Profile, Employees, and Setup. Below the tabs, the title 'Edit Checklists' is displayed. There are two 'Save' buttons. The main form has two dropdown menus: 'Category\*' and 'Checklist\*'. To the right of the 'Category\*' dropdown is a link that says 'Add/Edit Categories'. A large blue arrow points from the top left towards the 'Category\*' dropdown.

**Note:** To add a new category or checklist, click the **Add/Edit** links next to the Category and Checklist fields.

2.5 Modify the checklist and click the **Save** button.

The screenshot shows the 'Edit Checklists' interface with a checklist table. At the top, there are navigation tabs: Preferences, Users, Monthly Stats, Company Profile, Employees, and Setup. Below the tabs, the title 'Edit Checklists' is displayed. There are three buttons: 'Save', 'Copy Checklist Items', and 'Add Checklist Item'. The form has three dropdown menus: 'Category' (set to 'Safety Inspections'), 'Checklist' (set to 'Forklifts'), and 'Checklist Status Values' (set to 'Select options'). There is a checkbox for 'Vary Status Values by Checklist Item'. Below the form is a table with the following data:

Topic	Item Number	Standard/Reference	Description	Points	Status	
Powered Industrial Trucks	01	OSHA 1910.178	Employees trained appropriately?	100	Available	Delete
Powered Industrial Trucks	02	OSHA 1910.178	Overhead protective equipment provided on high lift rider equipment?	100	Available	Delete
Powered Industrial Trucks	03	OSHA 1910.178	Operating rules posted and enforced?	100	Available	Delete

A large blue arrow points from the top left towards the 'Save' button.

**Note:** On this page, you may change the topic, number, standard/reference, and description of each item in the checklist. You may also archive and delete items. To add a new item, click the **Add Checklist Item** button. To copy these checklist items to another checklist, click the **Copy Checklist Items** button.

### 3 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.

