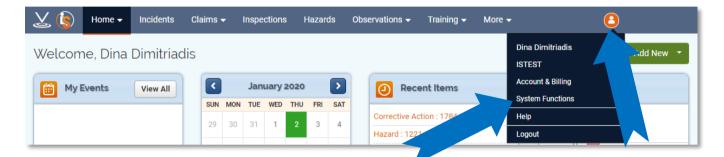
# IndustrySafe Quick Start Set-Up Guide

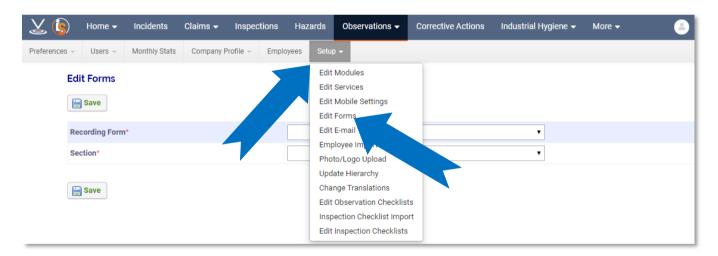
This guide gives a brief overview of how to get started seting up your IndustrySafe site. The quick start setup guide will go over the purpose of IndustrySafe's hierarchy, the benefits of adding users and employees, and brand your IndustrySafe Site, and to check the browser settings.

### 1 Hierarchy and Facility Setup

1.1 To setup your company's hierarchy, you will first need to determine how many facilities you have, how you would want to refer to them(facilities, locations, projects, etc.), and if they are grouped into regions or divisions. To setup the hierarchy, open the **Account Silhouette** icon located on the top right-hand corner of the screen and click on **Systems Functions**.



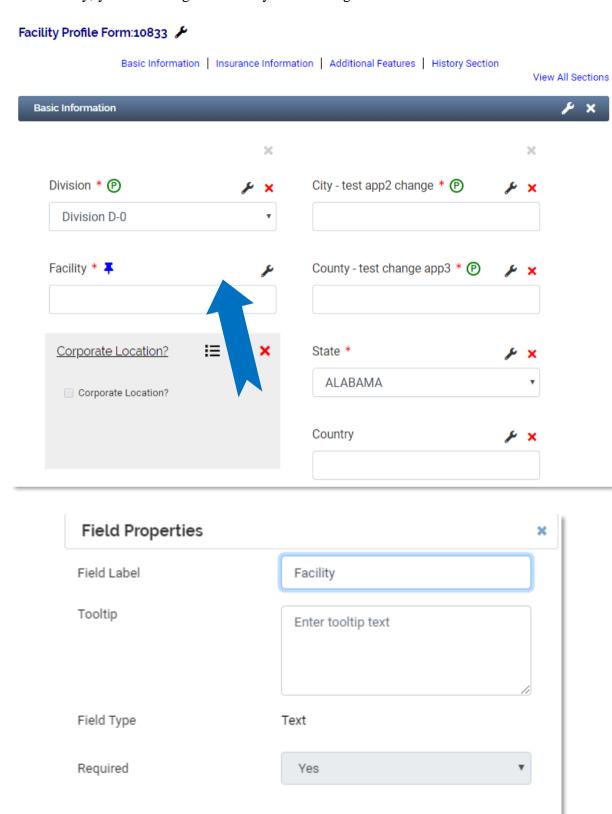
1.2 Click on **Setup** and then click on **Edit Forms**.



1.3 You would then put the recording form as **Facility Profile**.



1.4 If necessary, you can change the facility label through this menu as well.

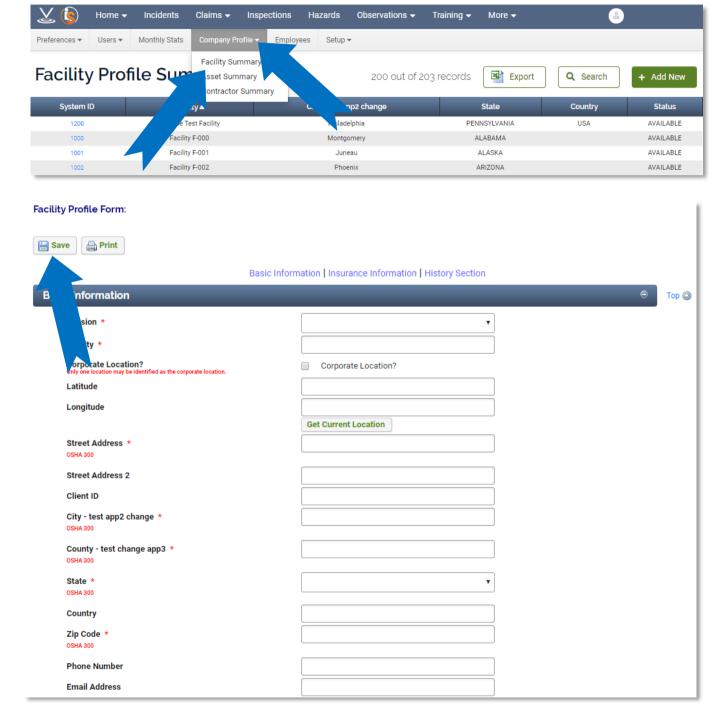


1.5 You are also able to enable other hierarchy levels through this menu if you find it necessary to do so.

Cancel

Note: IndustrySafe will assign a Client Success Manger who will help set up the hierarchy as part of the required implemenation.

1.6 For each facility, all you have to enter the is the designated Name, City, and State. You do this by accessing the Facility Profile Summary To get to this, follow step 1.1. When the grey navigation bar appears, click on **Company Profile** and then **Facility Summary**. You will be able to fill in the rest of the fields at a later time. The other fields only appear on the OSHA 300a and it is ok if you leave them blank. Remember to click **Save**.

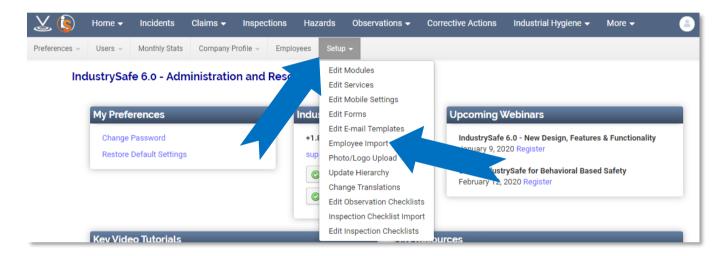


# 2 Employee Import

2.1 Before importing employee data into Industrysafe, you will first need to determine how many employees will be using IndustrySafe need to import. You will need to follow a checklist of items

needed for the Import Wizard. Your checklist must be in an MS Excel (.xls or .xlsx) file containing the following columns:

- o If the number is under 1000, upload an excel spreadsheet with your employee data on it to the **Employee Import Wizard**.
- o If the number is over 1000, the Employee Import Wizard will work the same as before, however you will have to break up your employee data in Excel before using the Wizard as there is an 1000 employee cap per import.
- If the number is over 1000 and you do not want to utilize the Employee Import Wizard, there is an FTP option as well for importing employee data automatically from your HR database.
- 2.2 Click on **System Functions**, then in the secondary gray bar click on **Setup** (shown in step 1.1). A dropdown will appear and then click on Employee Import. . An example Excel spreadsheet will also be available if needed.



- 2.3 Keep in mind that you must include your employee's ID number and that it must be unique to them. If you don't think they have employee IDs or are unaware of what they are, check with your HR system as there is usually an ID in there that they can use.
- 2.4 There is an excel sample sheet if needed to help guide this process. If you need to include contractors or other employees without ID numbers, you will have to manually create one for them as long as it is unique to them. (i.e. first and last name).

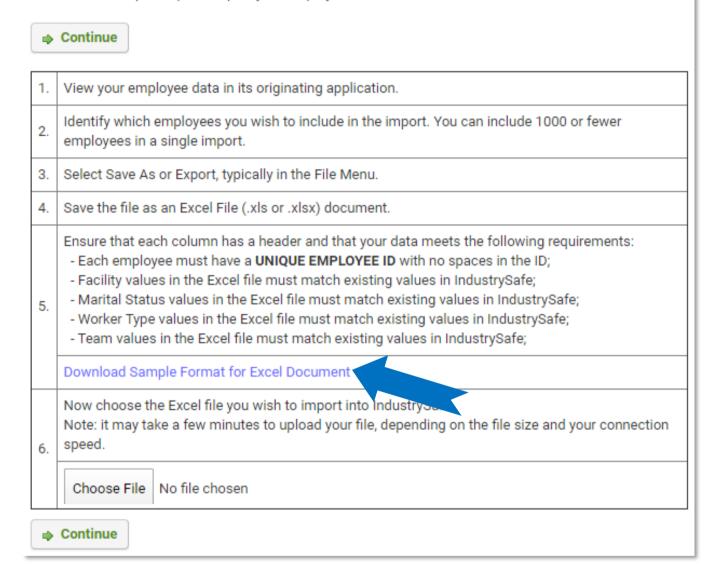
### **Employee Data Import Wizard**

#### Step 1 of 4: Import Employee Data

The Employee Data Import Wizard allows you to import Basic Employee Information.

The Wizard allows you to add new employees and update existing employee's information.

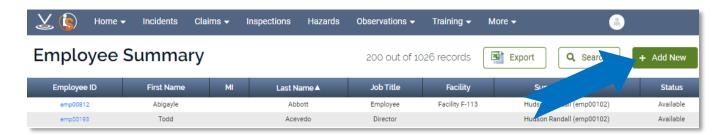
Follow these simple steps to import your employee information:



2.5 To add a new employee, click on **Employees in** the secondary gray navigation bar



2.6 Click on the green **Add New** button and a fill out all required information. Remember to click **Save.** 



## 3 User Setup

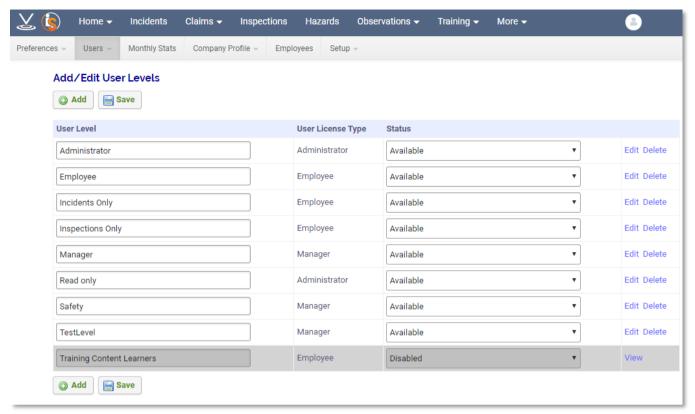
3.1 To add a new user, click on the **Account Sillhoute** and then Click on **System Functions** (shown in 1.1). Click on **Users** and click on **User Summary**..



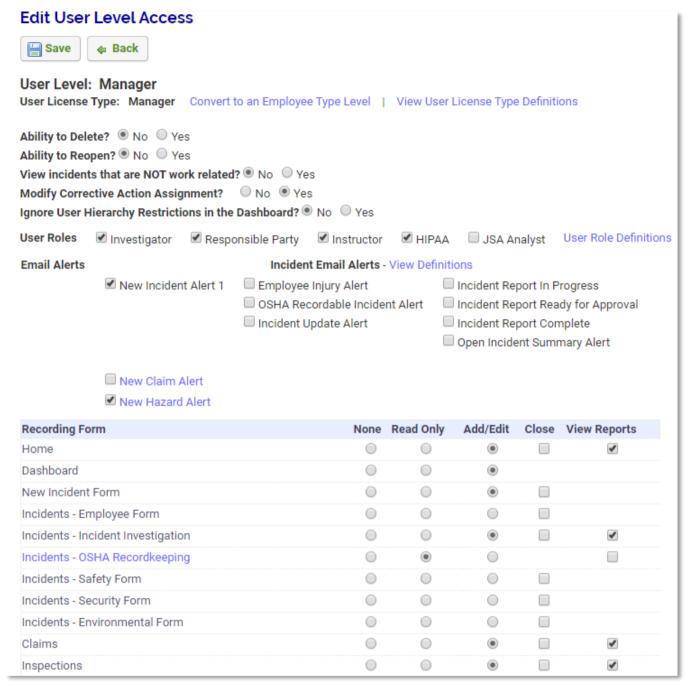
3.2 The User Summary screen will appear. To add a new user, click the **Add New** button located to the top right-hand corner of the screen and complete the required fields. Remember to click **Save**.



- 3.3 Explore Add/Edit Levels
  - o If all users will have the same user level, skip the review of user levels unless you want to get automatic email alerts for incidents
  - To view or change permissions of users, click on Users in the gray naviation bar and then click on User Levels.
  - o From here click on the edit button located in the last column of each user level. You'll be edit Email Alerts, User Roles, and Permissions for each user on this page.



- o Editting what each level of user has access to is done through the Access Matrix. To get to the access matrix, use the same steps as shown in section
- The Matrix is located at the bottom of the page and will allow you to manually select what what your level of users have access to. Remember to click **Save.**

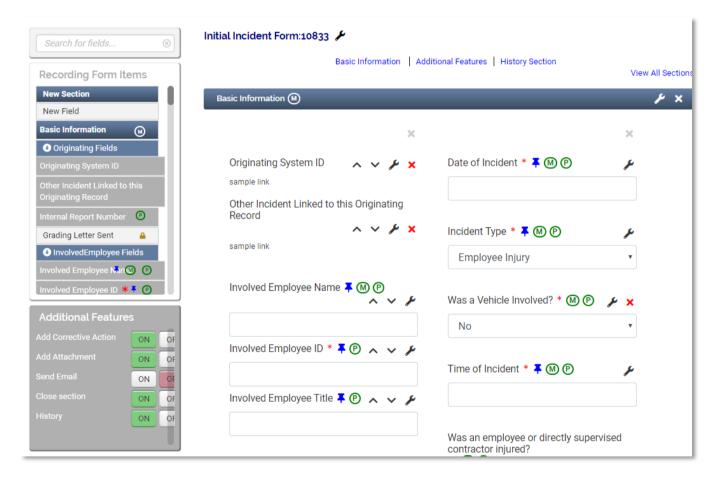


## **4 Configure Record Forms**

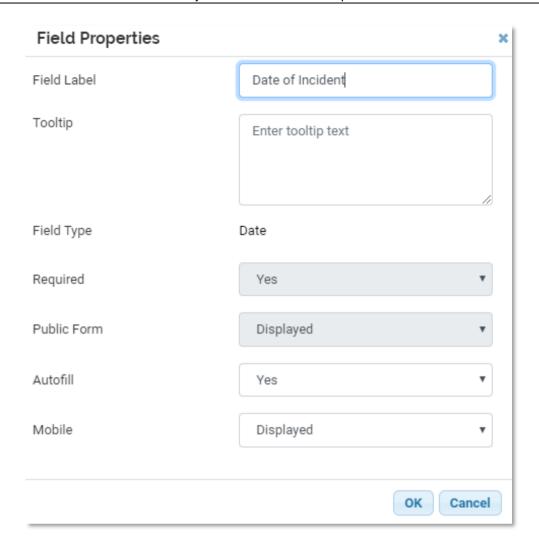
- 4.1 If you would like to configure record forms, you can do so by following the same procedures mentioned in 1.1 and 1.2.
- 4.2 To review and edit configuration options, choose the recording form and section type. This will give you an overview of the settings for each form and allow you to configure them to your choice. You can then view the final form by clicking on the view form button.



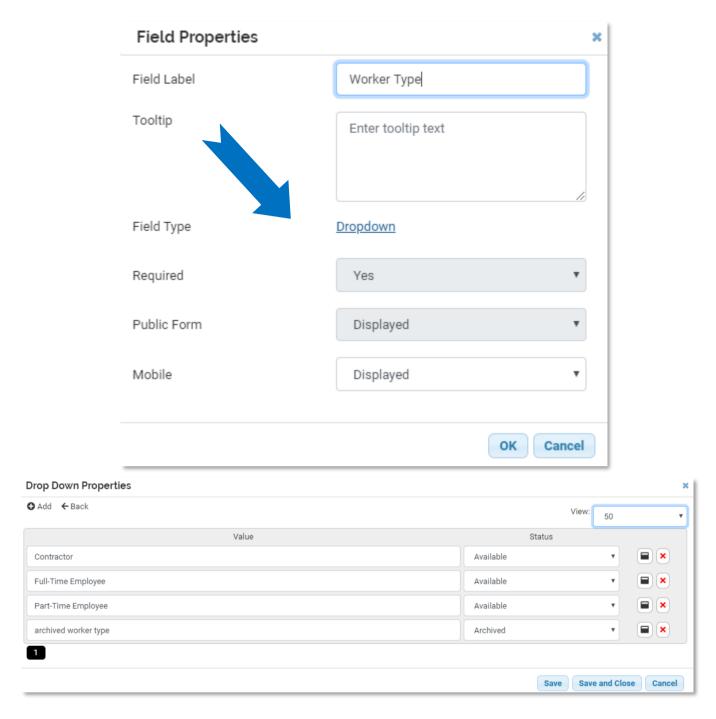
4.3 To change the field label, follow the same instructions listed in section 4.2 to get to the page that will let you configure forms. Once there, simply click on the text box and you will be able to change it to whatever you want.



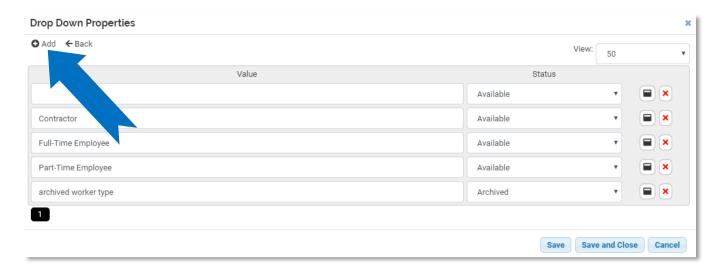
- 4.4 To change the Required \*, use the same method listed in section 4.2 to get to the configure page. From here you can change the Required \* with the drop down menu located in the same line as the Field Label text box.
- 4.5 To change the enabled or disabled status, use the same method listed in section 4.2 to get to the configure page. From here you can change the Required \* with the drop down menu located in the same line as the Field Label text box.



4.6 To edit the Drop Down menus, use the same method listen in section 4.2 to get to the configure page. From here, click on the Drop Down menu. You will then be able to edit the text that appears in the drop down menu from here.



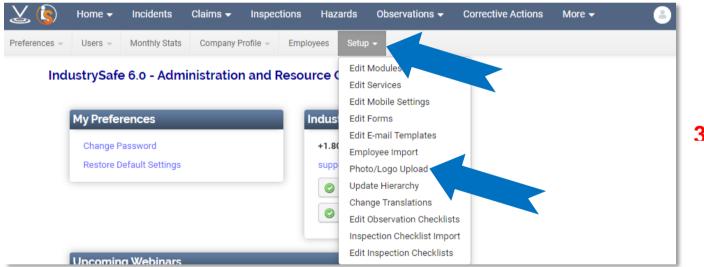
4.7 To add a new field, use the same method listed in section 4.2 to get to the configure page. From here you can add a new field by clicking on the "**Add**" button on the top left-hand corner of the Drop Down Properties page..

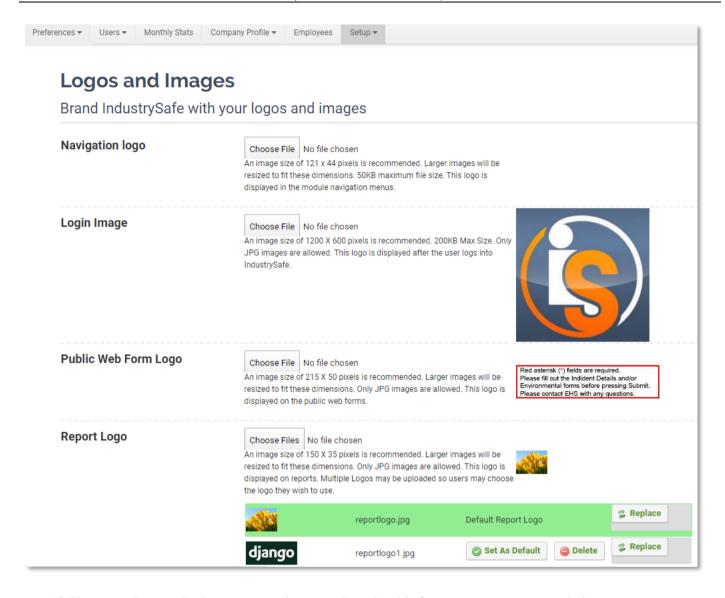


4.8 We recommend that you review your configuration worksheets for each form, marking which fields you want to change/remove. Then go back into the software and make changes.

### **Branding Your IndustrySafe Site**

5.1 To upload a logo for your Navigation Logo, :Login Image, Public Web Form Logo, or Report Logo, follow step 1.1. In the secondary grey navigation bar, click on **Photo/Logo Upload**.





5.2 You can also send a logo to us or have us download it from your company website.