

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.

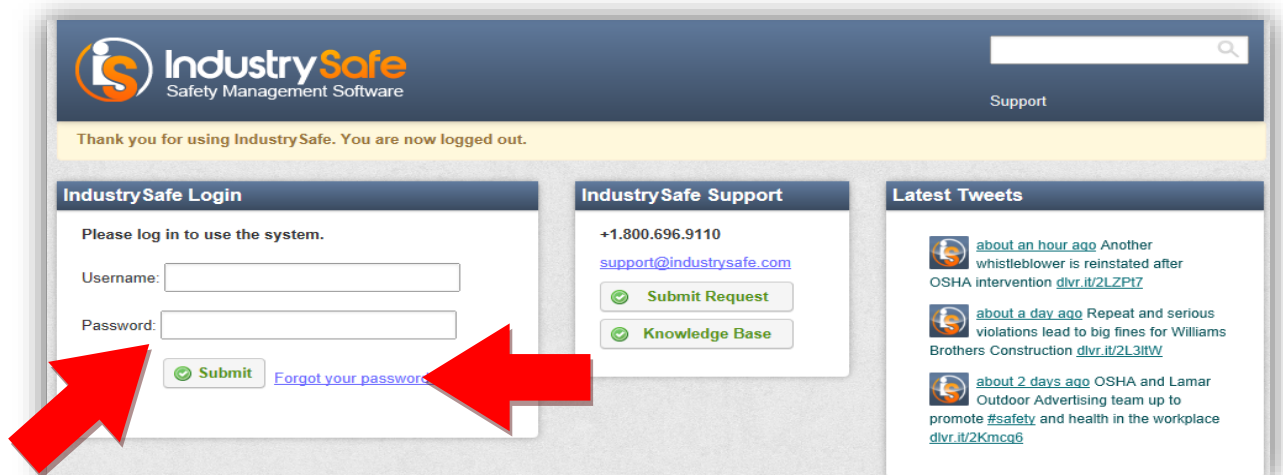
1 Log in to IndustrySafe

1.1 Using your preferred browser, go to <http://www.industrysafe.com>

1.2 Click on the **Login** button at the top right corner of the page.



1.3 Enter your username and password and click the **Submit** button.



Note: If you forget your username or password, click the **Forgot your password?** button to have your username and a new password emailed to you. The next time you log in you will be asked to change your password.

2 Adding a User

2.1 Click on the **System Functions** icon in the horizontal menu bar.



2.2 Under **Users** in the horizontal menu bar, click the **Add User** link.



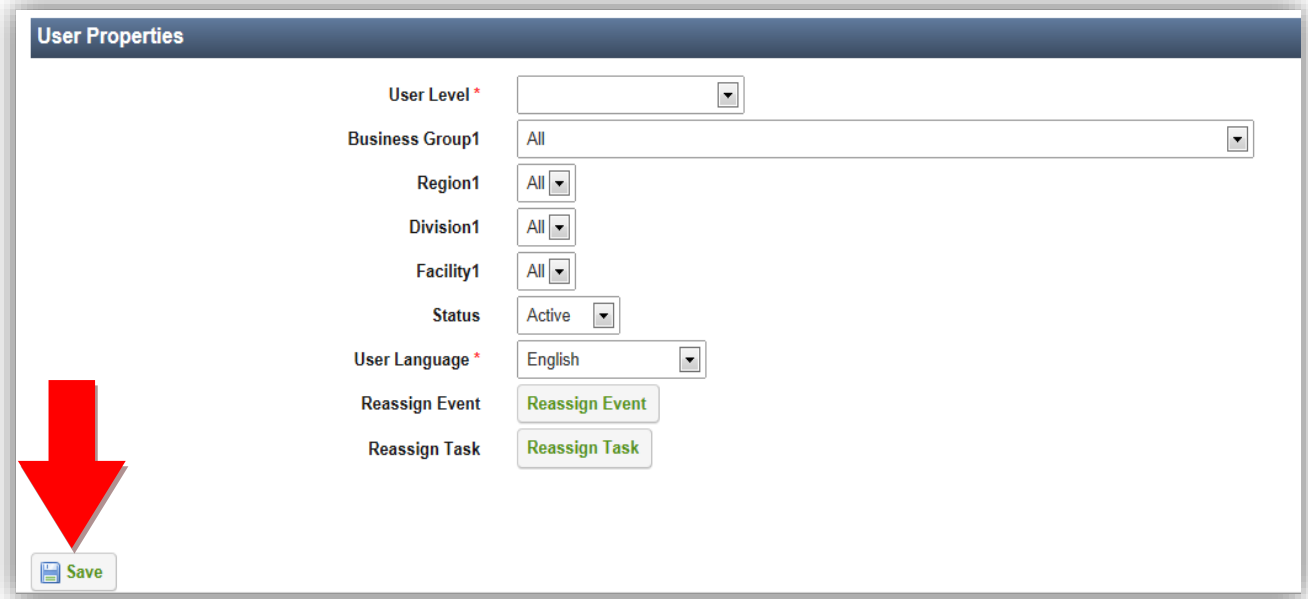
2.3 Complete the **Basic Information** section.

Basic Information	
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"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
E-Mail Address	<input type="text"/>
Date Created	<input type="text" value="10/19/2012"/>
Date Last Modified	<input type="text" value="10/19/2012"/>
Last Login Date	<input type="text"/>
IndustrySafe Newsletter	<input checked="" type="checkbox"/>

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.

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



The screenshot shows a web form titled "User Properties". The form contains several fields and buttons:

- User Level * (dropdown menu)
- Business Group1 (dropdown menu, value: All)
- Region1 (dropdown menu, value: All)
- Division1 (dropdown menu, value: All)
- Facility1 (dropdown menu, value: All)
- Status (dropdown menu, value: Active)
- User Language * (dropdown menu, value: English)
- Reassign Event (button: Reassign Event)
- Reassign Task (button: Reassign Task)
- Save (button: Save)

A large red arrow points to the Save button in the bottom left corner of the form.

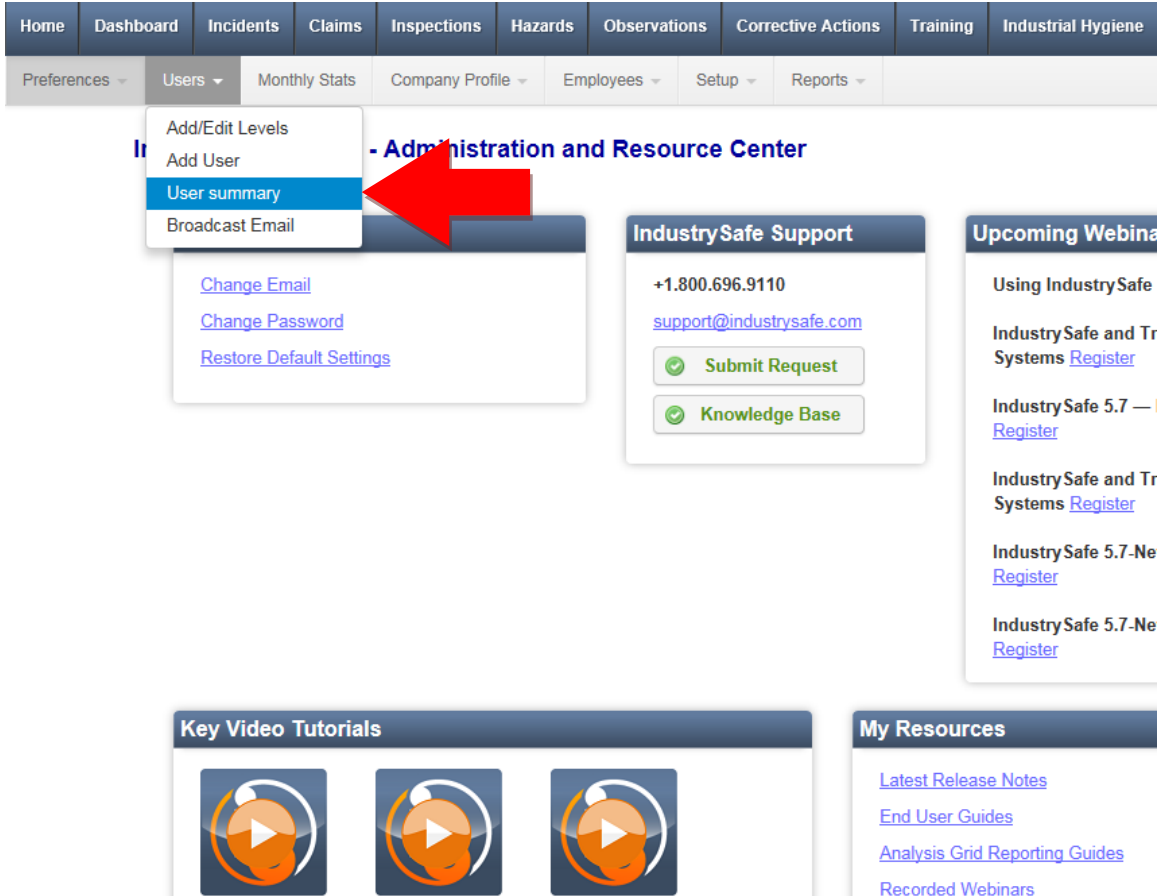
Note: The user level determines the permissions a user has to access modules (No Access, Read Only or Add/Edit; Delete; Close; Reopen; and Run Reports), and what email alerts they get.

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.

3 Updating a User

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



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

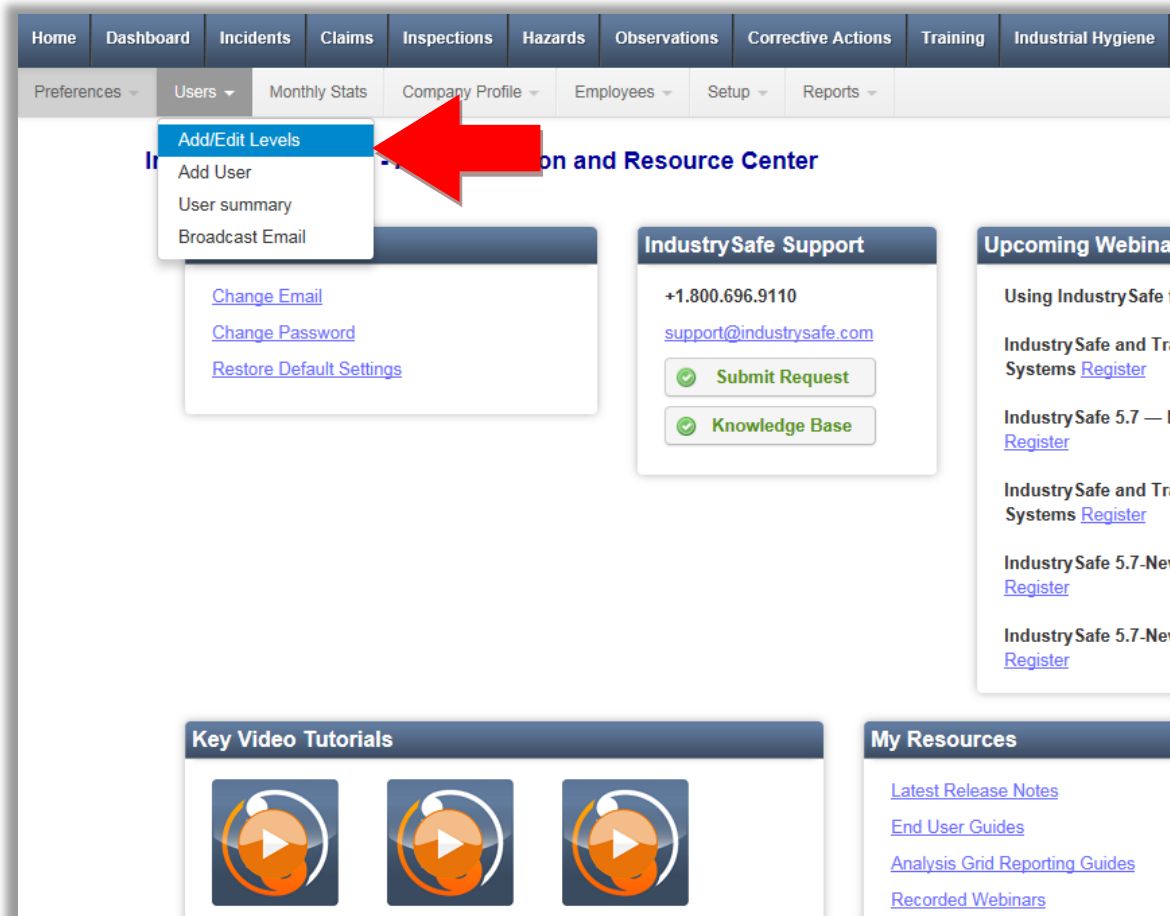
System ID	User Name	Last Name ▲
14451	gabriel	Thompkins
15171	twentythree	Three
15172	gabe-2@traonline.com	Tomkins
15173	johny215d	Tomkins
15174	gabeimp3@traonline.com	Tomkins
15175	gabeimp4	Tomkins
15176	johny215a	Tomkins
15177	johny215b	Tomkins
11860	johny215c	Tomkins
11862	johny215e	Tomkins
11863	johny215f	Tomkins

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

4 Adding and Editing a User Level

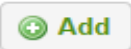

User permissions in IndustrySafe are controlled by the user level assigned to the user.

4.1 Under **Users** in the horizontal menu bar, click the **Add/Edit Levels** link.

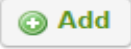




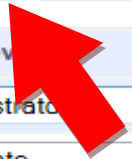
4.2 To add a new user level, click the **Add** button, otherwise click the **Edit** link next to the user level you wish to modify.

Add/Edit User Levels

User Level	Status	
<input type="text" value="Administrato"/>	Available ▾	Edit Delete
<input type="text" value="Corporate"/>	Available ▾	Edit Delete
<input type="text" value="EHS Administrator"/>	Available ▾	Edit Delete
<input type="text" value="Employee"/>	Available ▾	Edit
<input type="text" value="GBU-Infrastructure-Safety"/>	Disabled ▾	Edit Delete
<input type="text" value="GBU-Water -Supervisor"/>	Available ▾	Edit Delete
<input type="text" value="Manager"/>	Available ▾	Edit Delete
<input type="text" value="New Emp Level"/>	Available ▾	Edit Delete
<input type="text" value="Supervisors"/>	Available ▾	Edit Delete
<input type="text" value="Testing EHS II"/>	Available ▾	Edit Delete
<input type="text" value="Testing for EHS Functions"/>	Available ▾	Edit Delete
<input type="text" value="Testing for recordkeeping"/>	Available ▾	Edit Delete



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.

The screenshot shows the 'Edit User Level Access' form for the Administrator user level. At the top, there are 'Save' and 'Back' buttons. Below that, the 'User Level' is set to 'Administrator' and the 'User Type' is also 'Administrator'. The form includes several permission checkboxes: 'Ability to Delete?' (Yes selected), 'Ability to Reopen?' (Yes selected), 'View incidents that are NOT work related?' (Yes selected), 'Modify Corrective Action Assignment?' (Yes selected), and 'Ignore User Hierarchy Restrictions in the Dashboard?' (No selected). Under 'User Roles', 'Investigator', 'Responsible Party', 'Instructor', and 'HIPPA' are all checked, with a link to 'User Role Definitions'. The 'Email Alerts' section has 10 checkboxes, all of which are checked: 'New Incident Alert 1', 'New Incident Alert 2', 'New Incident Alert 3', 'Employee Injury Alert', 'OSHA Recordable Incident Alert', 'Incident Report In Progress', 'Incident Report Ready for Approval', 'Incident Report Complete', 'Incident Update Alert', 'Open Incident Summary Alert', 'New Claim Alert', and 'New Hazard Alert'.

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.

4.4 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 checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dashboard	<input type="radio"/>	<input type="radio"/>	<input checked="" 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 checked="" type="radio"/>	<input type="checkbox"/>	
Incidents - Incident Investigation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incidents - OSHA Record Keeping	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		<input type="checkbox"/>
Incidents - Safety Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	
Incidents - Security Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	
Incidents - Environmental Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	
Claims	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspections	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazards - Identification	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Hazards - Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations	<input type="radio"/>	<input type="radio"/>	<input checked="" 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"/>
Training - Class Catalog	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Training - Class Schedule	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
JSA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JSA Hazards	<input type="radio"/>		<input checked="" type="radio"/>		
Employees - Basic Information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Employees - Personal Information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Industrial Hygiene - Setup	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Industrial Hygiene - Monitoring and Assessments	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monthly Stats	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
EHS Functions	<input checked="" type="radio"/>		<input type="radio"/>		
System Functions	<input checked="" type="radio"/>		<input type="radio"/>		<input type="checkbox"/>

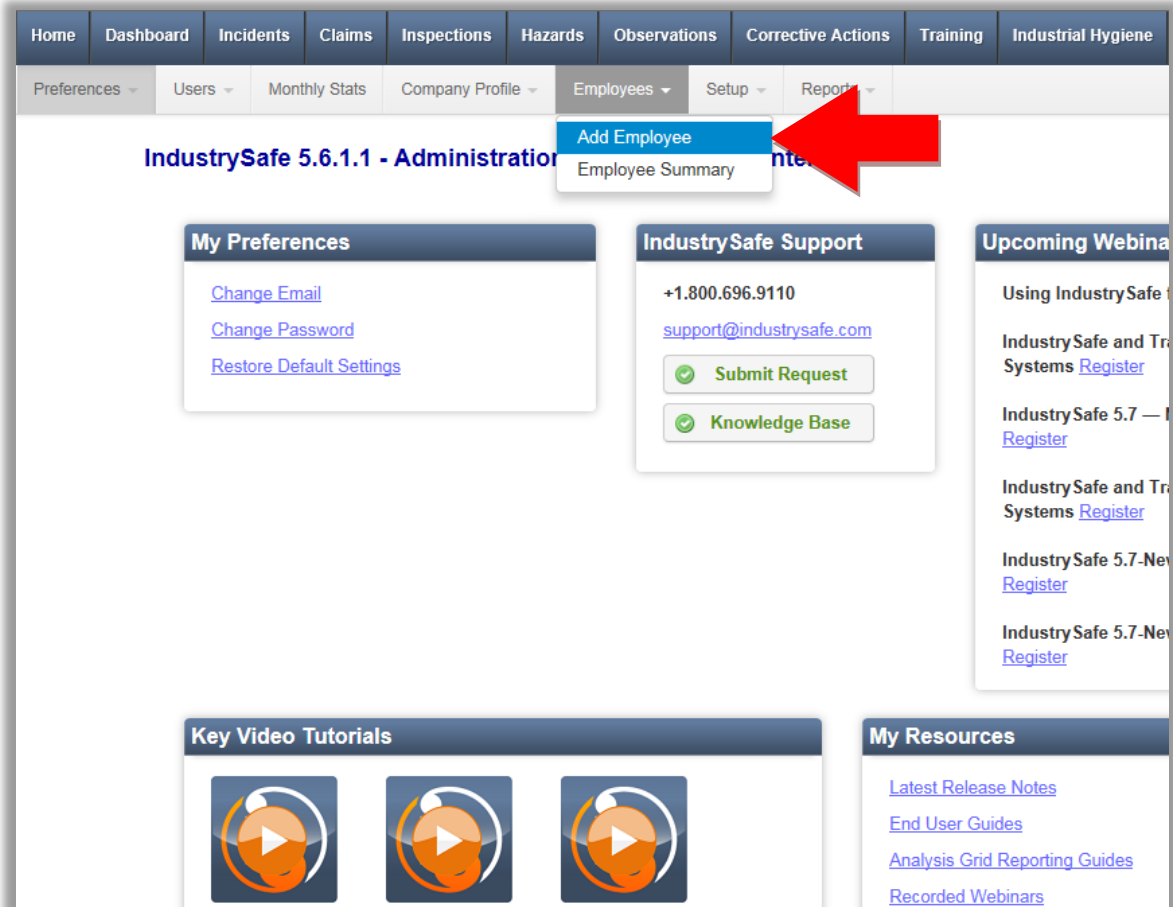


Note: For each module or form listed, users may be given no access, read only access, or the ability to add and edit records. Users may also be given the ability to close records and view reports.

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

5 Adding an Employee

5.1 Within **System Functions** click **Employees** from the horizontal menu bar, and then click **Add Employee**.



5.2 Fill out the **Employee Information** section then click **Save**.

Employee Information:

Save Back

Basic Information

Employee ID *

First Name

MI

Last Name

Facility1

Department12

Supervisor's ID12 *

Supervisor's Name12

Date Hired

Date Employee Started in Current Position

Date of Birth

Termination Date

Gender

6 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.

