IndustrySafe Advanced Search Guide

This guide describes the process for conducting advanced searches using the IndustrySafe Safety Management Software. The advanced search feature allows users to query and search forms within IndustrySafe and to export the search results to Excel. Search criteria can be saved for future use by each individual user.

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.

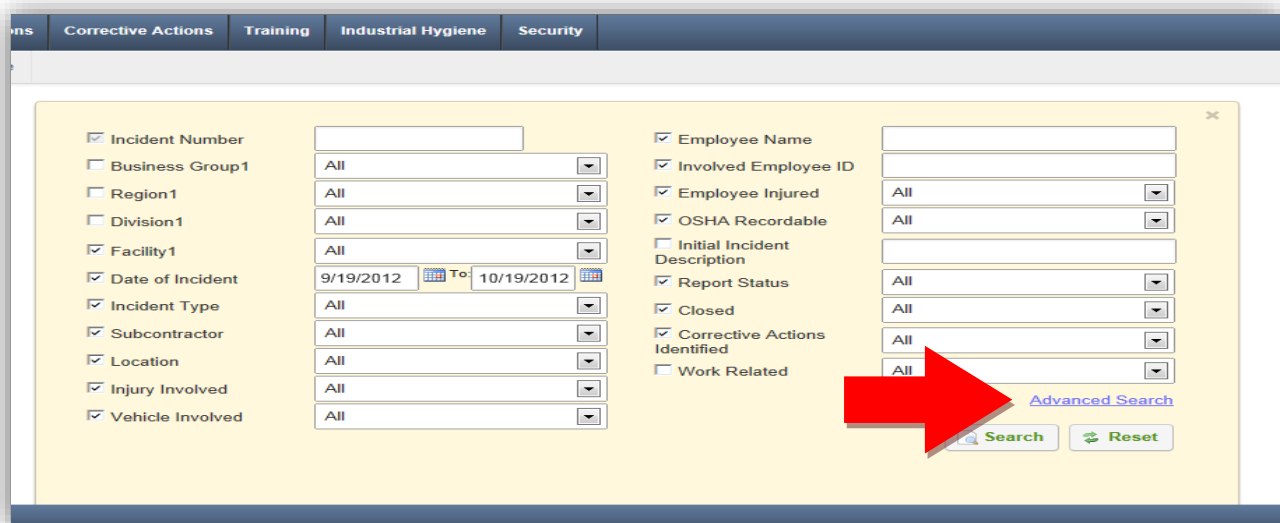1.3 Enter your username and password and click the **_Submit_** button.

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 Open the Appropriate Module

2.1 Click on the tab of the Module for which you want to conduct an Advanced Search. Advanced Search within IndustrySafe is organized by Module.
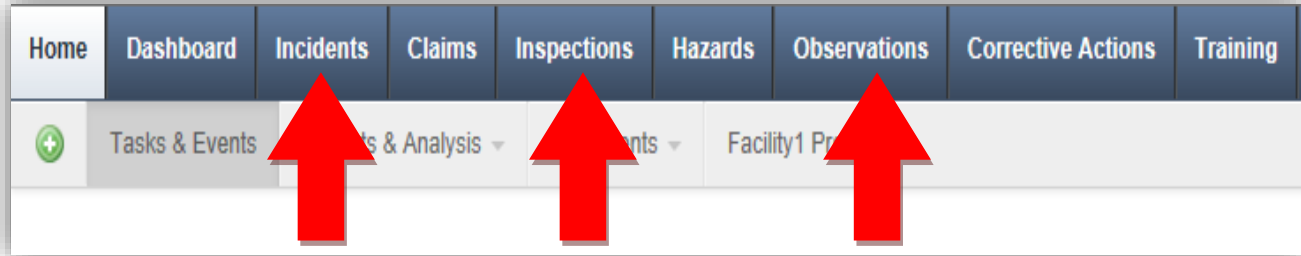
2.2 Click on the *__Magnifying Glass__* icon to access the Search screen, then click on *__Advanced Search__*.

2.3 If given the option, select the appropriate form to search.

3 Searching the Form

3.1 Enter your search criteria.

The search function is an "and" search, so multiple criteria will search for records that meet both criteria. For example, selecting Employee Injury for the Incident Type and Staff for the Subcontractor will search for records where the Incident Type is Employee Injury **and** the Subcontractor is Staff.

Text field searches will find all records where the text field contains your search criteria. For example, if you enter contract as your search term, the search will return records where the user entered contracts, contractor, or contracting in the field. An Asterisk * can be used to search for all records where a text field was not left blank.

3.2 Select the fields to Export

To exclude fields from the export of your search results, uncheck the checkboxes in the column to the left of the search fields.

3.3 Select Search.

After you have entered your search criteria and selected the fields to include in an export of the results, click the Search button.

3.4 Review Search Results and Export

Your search results will be displayed along with a count of how many records match your search criteria. You may then click on a **_System ID_** link (e.g.- Incident Number link in the illustration shown below) to view the corresponding record or click the **_Export to Excel_** icon to export all records to Excel.

Note: If you click the **_Export_** icon, you will be promoted to open or save the Excel file. The export file will include all records that match your search criteria and all fields you selected to include in the export file.

4 Loading and Saving Searches

The advanced search feature allows you to perform the following activities for each advanced search form:

1. Reload Last Search: Select this button to reload the last search you conducted.

2. Load Saved Search: Select this button to open a dialog box with a list of previously saved searches. Selecting a saved search will automatically enter the search criteria and export choices into the advanced search form.

3. Save: Select this button to update the saved search that you loaded with your current search criteria and export choices.

4. Save As: Select this button to save your current search criteria and export choices as a new saved search.

4.1 Loading a Saved Search

To load a saved search, click the **_Load Saved Search_** button to open the Search Criteria manager dialog box and click on the name of the search you wish to use.

5 General Notes about IndustrySafe

- Ensure that your browser allows pop-ups from IndustrySafe. This is required for certain features such as printing reports and attaching supporting documents.

- 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.