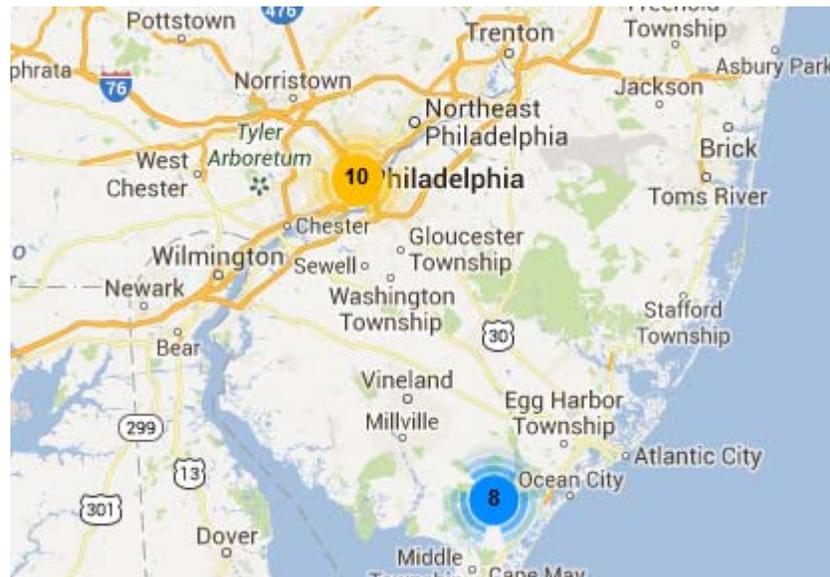


IndustrySafe 5.3 Update Overview



Fall 2013



Agenda

- Introduction
- Grid Analysis Reporting
- Dashboard Maps
- Form History
- Training Profile
- Mobile Phone Redesign
- Attachments Redesign
- Photo/Logo Upload
- System Functions Redesign



Introduction –Panelists

- Clare Epstein, Vice President of TRA
 - Sales and Marketing
 - Assists Clients with Implementation and Service Needs
- Gabriel Tompkins, Project Manager at TRA
 - Assists Clients with Implementation
 - Experienced with IndustrySafe



Time Frame -5.3 Updates

- Beta Sites by 09/13/2013
- All other sites by 10/01/2013

New Grid Analysis Reports

- Vehicle Incident Log
- Environmental Incident Log
- Security Incident Log
- Observations Log

New -(DOT) Vehicle Incident Log

- Vehicle Involved Equals Yes
- DOT Accident Register
- Determines DOT Recordability based on DOT Requirements
- Enable additional fields on Incident Investigation Form
- IndustrySafe DOT Vehicle Log Configurability:
<http://industrysafeforce.com/support/articles/General/Generating-DOT-Vehicle-Incident-Logs/>



(DOT) Vehicle Incident Log

Vehicle Incidents Log ⓘ

Refresh | Save | Load | Reset

DOT Recordable*

Formula **Layout** Sort Filter Group **Aggregate** Chart Crosstab Paging

[-] Table

⏪ ⏩ 1 2 3 4 5 6 7 8 9 10

Incident Number	Facility	Date of Incident	Name of Driver	Incident Type	DOT Recordable	Root Cause
Count: 340						
FY14-0047	1111 main	8/30/2013	Chris Alves	Property Damage	No	Frustration
FY14-0044	Mississippi Main	8/29/2013	Scott Kaminski	Injury	No	Complacency
FY14-0045	1111 main	8/29/2013	Chris Alves	Injury	No	Improper PPE
FY14-0041	Mississippi Main	8/23/2013	mike dowhy	Injury	No	Frustration
FY14-0040	1111 main	8/23/2013	Clare Epstein	Injury	No	
FY14-0038	1111 main	8/22/2013	Gabriel Tompkins	Illness	No	



*Additional Fields include: Number of Fatalities, Number of Injuries, Hazard Spill (Other than Fuel)



New -Environmental Incident Log

- Environmental Spill Release enabled and generated
- Fields from Environmental Spill Release Form

Environmental Incidents Log ⓘ

Refresh | Save | Load | Reset

Formula | Layout | Sort | Filter | Group | **Aggregate** | Chart | Crosstab | Paging

Table

Spill Release Fields



Incident Number	Facility	Date of Incident	Incident Type	Type of Material Spilled	Detailed Description of Spill	Spill Release Impact
Count: 90						
FY14-0035	1111 main	8/22/2013	Injury			
FY14-0022	Minneapolis	8/7/2013	Injury			
FY14-0008	Minneapolis	7/17/2013	Unsafe Act-Condition			
FY14-0006	NJ facility	7/11/2013	Illness			
FY14-0004	1111 main	7/8/2013	Process Safety event	Diesel Fuel	test of date	Other
FY13-0271	1111 main	6/30/2013	Environmental Release			
FY13-0270	1111 main	6/28/2013	Near Miss			



New -Security Incident Log

- Security Incident Form enabled and generated
- Fields from Security Incident Form

Security Incidents Log ⓘ

Security Fields

[Refresh](#) | [Save](#) | [Load](#) | [Reset](#)

☰ Table

Incident Number	Facility	Date of Incident	Incident Type	Security Type	Property Damage	Report Status	Closed
FY06-0821	Erie Street	2/16/2006				Open	Open
FY06-0902	Facility A	4/18/2006	Vehicle Accident			Open	Open
FY06-0922	The Warehouse	3/21/2006				Open	Open
FY06-0981	Facility A	4/3/2006				Open	Open



New – Observations Log

– Fields from Observations Form

Observation Fields

Observations Log ⓘ

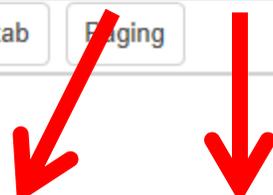
[Refresh](#) | [Save](#) | [Load](#) | [Reset](#)

- Formula
- Layout
- Sort
- Filter
- Group
- Aggregate
- Chart
- Crosstab
- Paging

Table

1
2
3
4
5
6
7
8
9
10

System ID	Facility	Checklist	Primary Observer Name	Date of Observation	Contact Name	Follow Up Requi
8088	Phoenix	Scantron Demo		1/2/2014		
9282	Mississippi Main	Safety Observation Report	Michael Svoboda	8/29/2013		
9242	1111 main	Safety Observation Report	Chris Alves	8/26/2013	Frank Huerta	
9142	1111 main	Safety Observation Report	Chris Alves	8/23/2013	Gabe Tompkins	
9222	Norman Oklahoma	Basic Observation Checklist	Chris Alves	8/23/2013	.Jim Barfield	



Replacement Analysis Reports

- Corrective Action Log
- Claims Log
- Claims Payment Log
- Inspections Log
- Hazards Log
- Task and Events Logs
- IH –Sampling Log
- IH –Exposure Assessment Log
- Required Training



Analysis Grid Reports

Export Features

Advanced Features

Header Components

Incident Log Report

Refresh | Save | Restore | Reset

Formula | Layout | Sort | Filter | Group | Aggregate | Chart | Crosstab | Paging

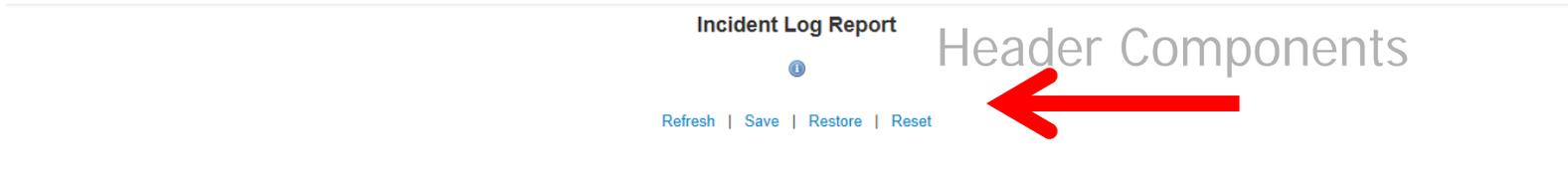
Table

Export: [Excel](#) [CSV](#) [PDF](#)

FAC	Incident Number	A_Date of Incident	A_Involvement Employee Name	A_Involvement Employee Title	A_Incident Type	A_Report Status	Closed	A_Initial Incident Description
Racine-WI	FY13-0090	3/14/2013	Private	New Job Title Here	First Aid/Record Only	Open	Open	e
Brand New 2	FY13-0091	3/14/2013	Johnny O'Bravo	New Job Title Here	Employee Injury	Open	Open	desc
Racine-WI	FY13-0092	3/14/2013	Johnny O'Bravo	New Job Title Here	Environmental Incident	Open	Open	desc
Racine-WI	FY13-0093	3/14/2013	Tester		Employee Injury	Open	Open	ddd
Racine-WI	FY13-0089	3/14/2013	Private	23423	Employee Injury	Open	Open	re
Tra Facility	FY13-0088	3/13/2013	Johnny O'Bravo	New Job Title Here	Employee Injury	Open	Open	iid
Tippah-MS	FY13-0086	3/13/2013	Johnny O'Bravo	New Job Title Here	Employee Injury	Open	Open	e
Tulsa-OK	FY13-0087	3/13/2013	This Person		Environmental Incident	Open	Open	44
Racine-WI	FY13-0085	3/12/2013	Johnny O'Bravo	Project Manager	Environmental Incident	Open	Open	e
New York	FY13-0082	3/1/2013	Amita Malik ZZZ		Other	Complete	Closed	hh
Oceanwinds Corporation	FY13-0080	2/28/2013	Gabriel Tompkins	Supervising Foreman	Employee Injury	Open	Open	test



Analysis Grid Reports



Refresh: Refreshes data

Save: Saves to file

Load: Loads saved user grid customizations

Reset: Back to Default Settings.

Analysis Grid Reports

Export Features



Excel: Exports all columns and records displayed to Excel

CSV: Exports all columns and records displayed to CSV

PDF: Includes Logo. Exports all columns and records displayed to PDF.

Analysis Grid Reports

Advanced Features -Formula

Allows users to add **Formula** (calculated) **Columns** to the data table.

Formula Layout Sort Filter Group Aggregate Chart Crosstab Paging

Add a new column from a formula. [Formula Help](#)

Name

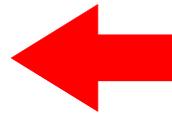
Insert a column

Formula

Data Type

Display Format

Table



Entering Formula
for Time Lag in
Reporting Incidents

Analysis Grid Reports

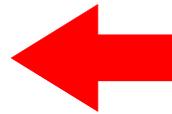
Advanced Features -Layout

Allows users to select which columns to display in the table

Formula **Layout** Sort Filter Group Aggregate

Show and hide columns.

	Visible
New Business Group1	<input type="checkbox"/>
New Region1	<input type="checkbox"/>
New Division1	<input type="checkbox"/>
Facility1	<input checked="" type="checkbox"/>
New Section	<input type="checkbox"/>
New Location	<input type="checkbox"/>
New Department	<input type="checkbox"/>
Incident Number	<input checked="" type="checkbox"/>
New Date of Incident	<input checked="" type="checkbox"/>
New Involved Employee ID	<input type="checkbox"/>
New Involved Employee Name	<input checked="" type="checkbox"/>
New Involved Employee Title	<input checked="" type="checkbox"/>
New Worker Type	<input type="checkbox"/>



Check columns to display

Analysis Grid Reports

Advanced Features -Sort

Allows users to set the **initial sort order** of the grid columns, including cascading sort orders

Sort Order Columns:

- Facility1 - Ascending Replace Remove
- New Involved Employee Name - Ascending Replace Remove

Table

1 2 3 4 5 6 7 8 9 10

Facility1	Incident Number	New Date of Incident	New Involved Employee Name	New Involved Employee Title	New Incident Type	Report Status	Closed	New I
	FY08-0537	2/19/2008	Clare Epstein	Supervisor	Vehicle	Open	Open	nothing happened
	FY04-0303	1/5/2004	Marvin Harrison	Employee	Employee	Open	Open	



Analysis Grid Reports

Advanced Features -Filter

Allows users to **exclude data** from the display grid using a variety of criteria.

[Refresh](#) | [Save](#) | [Restore](#) | [Reset](#)

Formula
Layout
Sort
Filter
Group
Aggregate
Chart
Crosstab
Paging

Filter out rows by cell values.

Filter Column:

Comparison:

Value:



Filters:

[New Date of Incident] >= 30 Days Ago

Table

Facility1	Incident Number	New Date of Incident	New Involved Employee Name	New Involved Employee Title	New Incident Type	Report Status	Close
Racine-WI	FY13-0090	3/14/2013	Private	New Job Title Here	First Aid/Record Only	Open	Open
Racine-WI	FY13-0092	3/14/2013	Johnny O'Bravo	New Job Title Here	Environmental Incident	Open	Open
Racine-WI	FY13-0093	3/14/2013	Tester		Employee Injury	Open	Open
Racine-WI	FY13-0089	3/14/2013	Private	23423	Employee Injury	Open	Open



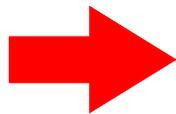
Analysis Grid Reports

Advanced Features -Group

Allows users to users to **group** and **sub-group** data in the display grid using a variety of criteria.

« 1 2 3 4 5 6 7 8 9 10 »»

Facility1	Incident Number	New Date of Incident	New Involved Employee Name	New Involved Employee Title	New Incident Type	Report Status	Closed	
	FY08-0554	3/20/2008	Private	Important Person	Employee Injury	Open	Open	aasdsaf
	FY08-0537	2/19/2008	Clare Epstein	Supervisor	Vehicle	Open	Open	nothing happened
	FY04-0303	1/5/2004	Marvin Harrison	Employee	Employee Injury	Open	Open	
Abbeville-SC								
	FY11-0315	6/16/2011	Private		Employee Injury	Open	Open	jkjkjk
Acadia-LA								
	FY11-0173	3/11/2011	Private	Analyst	Employee Injury	Open	Open	asfsdfd
Accomack-VA								
	FY13-0021	9/10/2012	Johnny O'Bravo	Shop Foreman	Security	Open	Open	new incidenti descriptio3
	FY13-0012	7/26/2012	Private	Shop Foreman	Other	Open	Open	testing email alerts
	FY11-0173	3/11/2011	Private	Analyst	Employee Injury	Open	Open	asfsdfd



Analysis Grid Reports

Advanced Features -Aggregate

Allows users to **aggregate** data in the display grid

Navigation: << < 1 2 3 4 5 6 7 8 9 10 > >>

Facility1	Incident Number	New Date of Incident
Count: 1,803		
	Count: 3	
Abbeville-SC	Count: 1	
Acadia-LA	Count: 1	
Accomack-VA	Count: 4	
Adams-CO	Count: 1	
Adams-IA	Count: 1	
Adams-IN	Count: 3	
Adams-OH	Count: 1	
Aiken-SC	Count: 2	
Aitkin-MN	Count: 5	
Alabama facility	Count: 8	
Alabama Marketing Facility	Count: 4	
Alachua-FL	Count: 4	
ALASKA	Count: 91	




Analysis Grid Reports

Advanced Features -Chart

Allows users to add **charts** to their display.

3-0063 Racine-WI 1/30/2013 Johnny O'Bravo

Formula Layout Sort Filter Group Aggregate **Chart** Crosstabs

Bar Chart - Count of Incidents by Facility1 Add To Dashboard

Add charts and gauges.

Add: Pie **Bar** Line Curved Line Scatter Plot Heatmap Gauge

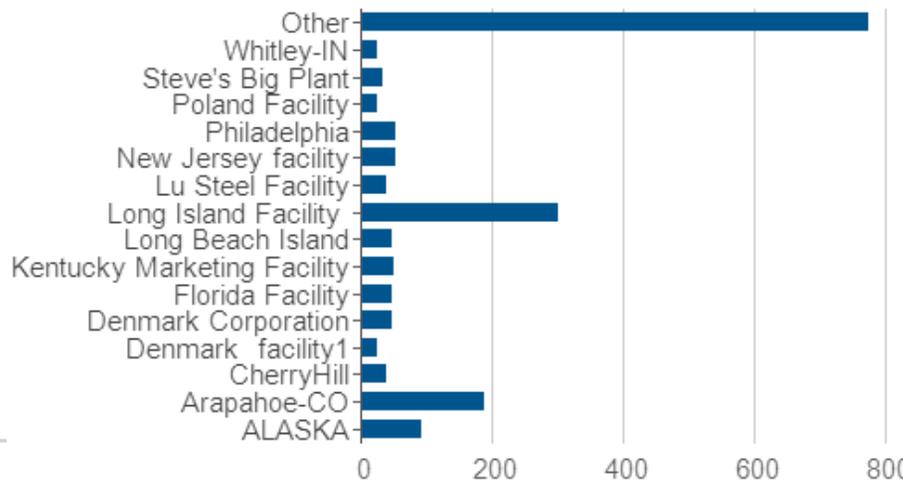
Label Column Facility1

Data Column Incidents

Data Aggregation Count

Charts:

- Bar Chart - Count of Incidents by Facility1



Facility	Incidents (Approximate)
Other	800
Whitley-IN	50
Steve's Big Plant	50
Poland Facility	50
Philadelphia	50
New Jersey facility	50
Lu Steel Facility	50
Long Island Facility	300
Long Beach Island	50
Kentucky Marketing Facility	50
Florida Facility	50
Denmark Corporation	50
Denmark facility1	50
CherryHill	50
Arapahoe-CO	150
ALASKA	100



Analysis Grid Reports

Advanced Features -Crosstab

Allows users to add a **Crosstab** (also called a Pivot) table

Formula
Layout
Sort
Filter
Group
Aggregate
Chart
Crosstab
Paging

Add a crosstab/pivot table to show summarized information with groupings listed in both rows and columns.

Header Values Column The crosstab will have one column for each unique value.

Label Values Column The crosstab will have one row for each unique value.

Aggregate Values Column The contents of the crosstab as the Sum, Average, Standard Deviation or Count of the Header and Label columns.

Aggregate Function The function used to aggregate the values in the crosstab cells.

Crosstabs:

- New Incident Type by Facility1 on COUNT of Incident Number

Crosstab - New Incident Type by Facility1 on COUNT of Incident Number

«
1
2
3
4
5
6
7
8
9
10
»

Facility1	First Aid/Record Only	Environmental Incident	Employee Injury	Other	Non-Employee Injury	Fire	Incident Type	Security
Racine-WI	1	5	5		1	1	3	1
Tra Facility			3					
Tippah-MS			1					
Tulsa-OK		1						
Brand New 2			1					
New York				1				
Oceanwinds Corporation		1	5			7		
Arapahoe-CO		3	171	1		6		1
Wayne-GA			3					



Analysis Grid Reports

Advanced Features -Paging

Allows users determine rows per page

Formula Layout Sort Filter Group Aggregate Chart Crosstab **Paging**

Set the number of rows displayed per page.

Show all rows
 Show paging

Rows per Page

OK

Table

« 1 2 3 4 5 6 7 8 9 10 »»

Incident Number	Facility1	New Date of Incident	New Involved Employee Name	New Inv
FY13-0090	Racine-WI	3/14/2013	Private	New Job Tit
FY13-0092	Racine-WI	3/14/2013	Johnny O'Bravo	New Job Tit



Mapping –Longitude and Latitude

Location	<input type="text"/>	
Department	Sales <input type="text"/>	
Latitude	39.2761000 <input type="text"/>	
Longitude	-74.7870030 <input type="text"/>	<input type="button" value="Get Current Location"/>
Was This Incident Work Related? *	Yes <input type="text"/>	
Was a Vehicle Involved? *	Yes <input type="text"/>	
Was an employee or directly supervised contractor injured? *	Yes <input type="text"/>	
Was a Non-Employee injured? *	No <input type="text"/>	
Was Property Damage Involved? *	Yes <input type="text"/>	
Initial Incident Description *	<input type="text"/>	
Select Additional Incident Forms	<input checked="" type="checkbox"/> Incident Investigation <input type="checkbox"/> Employee Form <input type="checkbox"/> Safety Form <input type="checkbox"/> Security Form	

Enable Latitude and Longitude on New Incident Form

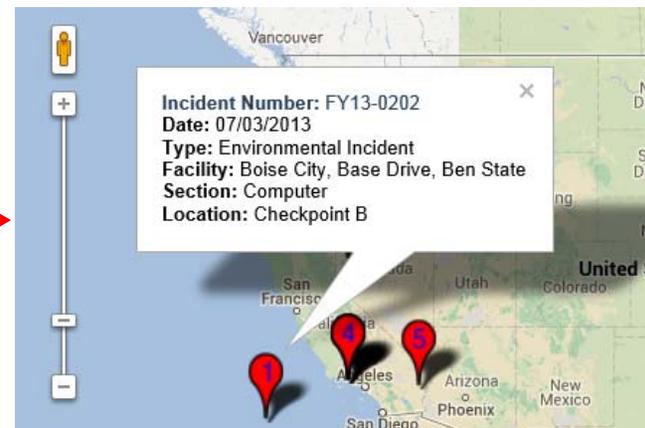
Can link to location, facility, and section

Mapping –Longitude and Latitude

Enable Map on Dashboard



Drill Down for More Info



History Tracking

Available on All Forms

Additional Fields depending on Form



The screenshot shows a 'History' table with columns for User, Report Status, and OSHA-recordable. Above the table are buttons for Save, Back, Close, and Print. Red arrows point from the text 'Available on All Forms' to the buttons and the table header. Another red arrow points from 'Additional Fields depending on Form' to the 'OSHA-recordable' column. A long red arrow points from the top text to the right side of the table header.

	User	Report Status	OSHA-recordable	
Updated	Stephen Ehrlich	Ready for Approval	OSHA	3 Sep 2013, 10:39 AM (EST)
Updated	GoCanvas Epstein	Ready for Approval	OSHA	3 Sep 2013, 09:35 AM (EST)
Updated	GoCanvas Epstein	Ready for Approval	OSHA	3 Sep 2013, 09:35 AM (EST)
Updated	Chris Alves	Ready for Approval	OSHA	30 Aug 2013, 12:23 PM (EST)
Created	Chris Alves	Open	Not OSHA	30 Aug 2013, 12:16 PM (EST)



Can be enabled/or disabled by IndustrySafe System Administrators in System Functions
 –Setup –Edit Forms

Training Profile

- Adding Profiles
 - Input Classes into Class Catalog
 - Grouping of Training Classes from Class Catalog
 - Assigned to Employees
 - Multiple Profiles per Employee
 - Not dependent on Job Title
 - Can vary training requirement by locations
 - Replaces Assign Training Matrix



Training Summary Profile

System ID ▲	Profile Name	Business Group	Region	Division	Facility
1381	Safety Manager	multiple	Campus Crest	Construction	mt
1382	1111 Main	Water	Campus Crest	Construction	111
1383	BALLERINA	Water	Campus Crest	Facilities	111
1384	Plant Operations Manager	Water	Campus Crest	Facilities	111
1385	Shift Supervisor				Genzym
1386	Analyst	Water	Campus Crest	Facilities	1211 W. Mogollon
1387	Sheetmetal Fabricator 8				LA



Training Profile

Basic Information

Profile Name*

Safety Manager

Status*

Available

Description

Safety Manager's required courses - 2013

Assign Classes

Required Classes

 Edit

Select All Unselect All

10-Hour Osha Construction Training (580)
Advanced Chemical Hygiene Officer (3)
Airport Customer Service (702)
Asbestos Awareness (480)
Confined Space Procedures And Permitting (500)
Cpr And First Aid (Including Aed) (703)
Ergonomics (520)
Fall Protection (1560)
Fire Safety Prevention (4)
First Aid (1)
Hazard Communication (560)
Hazard Communication (7)

Assigned classes for the current profile



Edit to add and remove classes by location, name, retraining cycle, and category

Training Profile

Assign Employees

[Assign Employees to This Profile](#) Keep Employees Linked to Profile?

This training profile applies to employees at the following locations

Business Group	Region	Division	Facility
Injection			test
Water	Campus Crest	Construction	1111 main
Water	Campus Crest	Construction	Fort Collings, Colorado
Water	Campus Crest	Construction	Mississippi Main
			Clare's Location
			Crystal Lake
			Eagle & Phoenix Mills
			Georgetown Satellite



Locations display based on employees at that location



Assign Employees to Profile

Profile Name*

Safety Manager

Keep Employees Linked to Profile? ⓘ

Yes

Can also use import service

10 Assigned Employee(s)  Edit View 100

Select All Unselect All

Blanton, Kevin (Sheffer)
Dancer, Tiny (133333)
Dooley, Charles G. (6690)
Dowhy, Mike (5054501444379806)
Johnson, Darin (CC5379)
Lee, Susan (AdvancedAuto1234)
Rowe, Ron (1234-January)
Rowe, Ron (Rowe2)
Tompkins, Gabriel A. (1)
Witherow, Mary L. (SC234)

Assigned employees for the current profile

Edit to add and remove employees by location, name, job title, worker type, department, and status

Copy Employees From the Following Profile

 Copy



Employee Information

Employee Information: Clare Epstein - 613, Plant Operations Manager

 Delete

 Print Certification Badge

[Basic Employee Information](#)

[Required Classes](#)

[Class History](#)

[Incident History](#)



 Upload Photo

 Remove

Employee Status

Home Location: 1111 main

Hire Date: 1/20/1990 - 23 Years, 235 Days

Last Incident Date: 08/23/2013
Overdue for Training? Yes

This employee has been involved in 25 Incidents in the last 365 days.

Profiles

[1111 Main , Plant Operations Manager](#)

View and Link to Employee Training Profile



Training Profile Reports

New Training Profile Report

Addition of Profile filter to existing training reports



Training By Profile

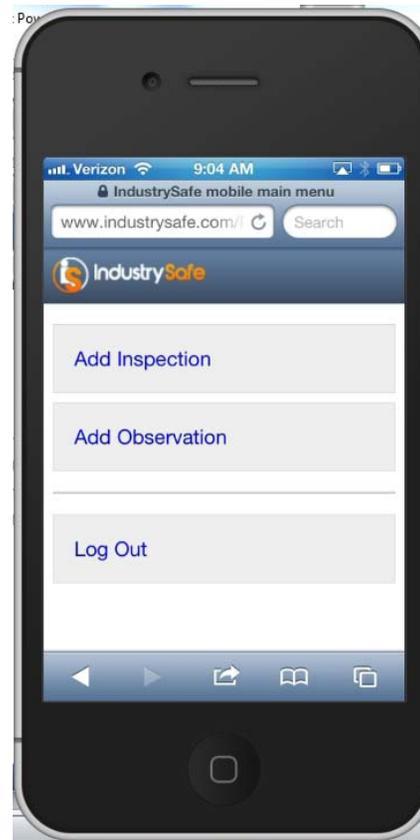
Business Group: All Region: All Division: All Facility: All Department:
 Profile: Safety Analyst Class Name: All

Profile: Safety Analyst		
Class Name	Training Class Category	Retraining Cycle
10-Hour OSHA Construction Training-580	Safety	2 Years
Advanced Chemical Hygiene Officer-3	Management	As Needed
30-hour OSHA training-1320	Supervisors	5 Years



Mobile Phone Re-Design

- Add Inspections
- Add Observations



Supporting Documents Upload

- Hover over to view images
- Upload multiple files at once (dependent on browser)
- Automatic naming of file

Involved Employee: Larry Ivanov - QA

 Add ▾

 Delete

[New Incident Form](#) 

[Incident Investigation - Open](#) 

Attachments

[facebook.png](#)



Corrective

[25364 - Open](#)

<https://www.industrysafe.com/uploads/demo/engine/uploa>



Photo/Logo Upload

- Cleaner interface
- Multiple report logos

Logos and Images

Brand IndustrySafe with your logos and images

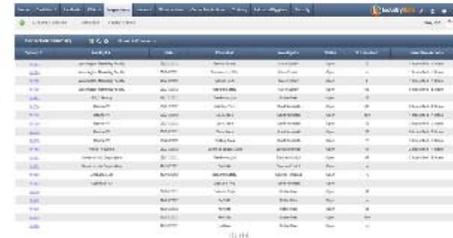
Navigation logo

An image size of 150 X 26 pixels is recommended. 50KB Max size. Larger images will be resized to fit these dimensions. Only JPG images are allowed. Only JPG images are allowed. This logo is displayed in the module navigation menus.



Login Image

An image size of 1200 X 600 pixels is recommended. 200KB Max Size. Only JPG images are allowed. This logo is displayed after the user logs into IndustrySafe.



Public Web Form Logo

An image size of 215 X 50 pixels is recommended. Larger images will be resized to fit these dimensions. Only JPG images are allowed. This logo is displayed on the public web forms.



Photo/Logo Upload

Select Your Report Logo

Users can select default report logo



Current Logo:  Industry Safe

 Industry Safe	reportlogo.jpg	<input checked="" type="checkbox"/> Use This Logo
	reportlogo1.jpg	<input checked="" type="checkbox"/> Use This Logo
	reportlogo2.jpg	<input checked="" type="checkbox"/> Use This Logo
	reportlogo4.jpg	<input checked="" type="checkbox"/> Use This Logo
	reportlogo6.jpg	<input checked="" type="checkbox"/> Use This Logo
	reportlogo10.jpg	<input checked="" type="checkbox"/> Use This Logo
	reportlogo11.jpg	<input checked="" type="checkbox"/> Use This Logo

System Function Home Page -



IndustrySafe 5.3 - Administration and Resource Center

My Preferences

- [Change Email](#)
- [Change Password](#)
- [Restore Default Settings](#)

IndustrySafe Support

+1.800.696.9110
support@industrysafe.com

Upcoming Webinars

- Training Tracker: 08/08/2013 [Register](#)
- VPP Compliance: 08/22/2013 [Register](#)
- IndustrySafe Release 5.3: 09/25/2013 [Register](#)
- IndustrySafe Release 5.3: 10/09/2013 [Register](#)
- IndustrySafe Grid Analysis: 10/16/2013 [Register](#)

Key Video Tutorials

-  Logging Into Industrysafe
-  Resetting My IndustrySafe Password

My Resources

- [Latest Release Notes](#)
- [End User Guides](#)
- [Analysis Grid Reporting Guides](#)
- [Recorded Webinars](#)



Resources for 5.3

– Release Notes:

- Knowledge Base -5.3 Updates and Powerpoint
- Knowledge Base –Training Profile
- Knowledge Base –Longitude and Latitude
- Knowledge Base –Logo
- Knowledge Base -Mobile

– Recorded Webinar:

- <http://www.youtube.com/user/IndustrySafeSoftware>

– Telephone Support



Questions

IndustrySafe, a Product of TRA, Inc.

www.industrysafe.com

(215) 546-9110

sales@industrysafe.com

