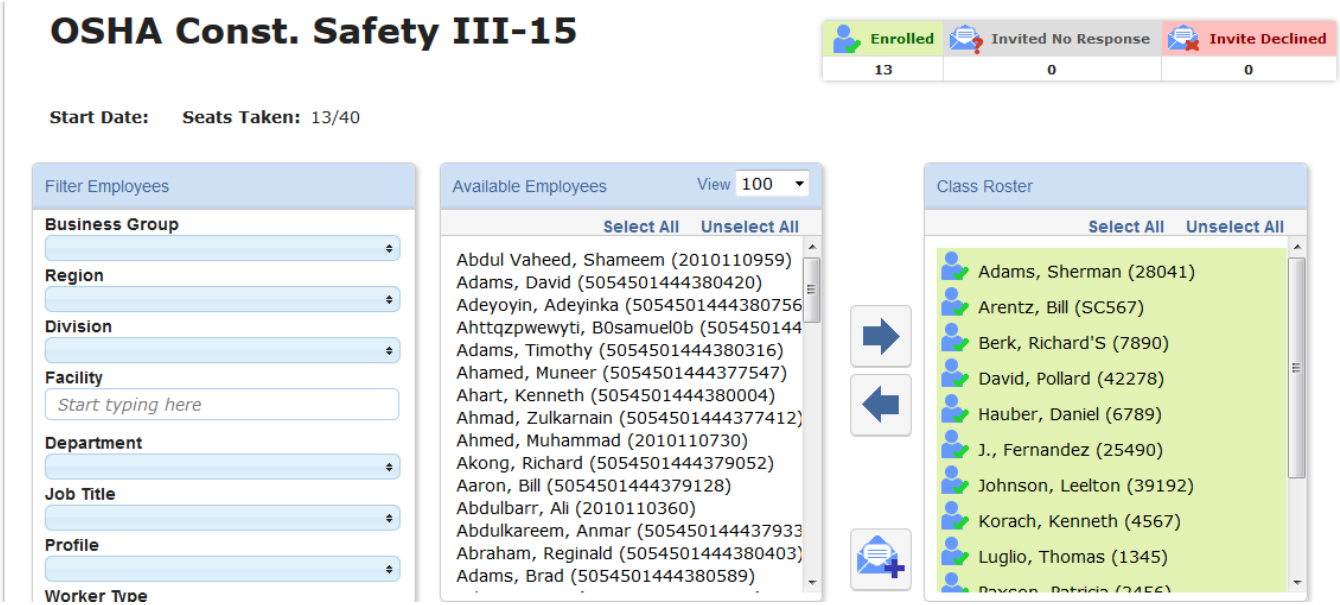
IndustrySafe 5.4 Update Overview



Spring 2014

Agenda

- Introduction
- Training Enhancements
  - Employee Pages
  - Training Scheduling
  - Enrollment and Results Wizards
  - Training Calendar
- Reporting and Dashboards
  - Saving and Sharing Reports
  - New Analysis Grids
  - New Rate Report
  - New Observation Dashboards

Agenda

- Incidents
  - Multi Select Body Parts
  - Linked Incidents
  - Monthly Statistics Summary Screen
- Facility Search
- Child Form Improvements
- Mobile Forms Re-design

Introduction –Panelists

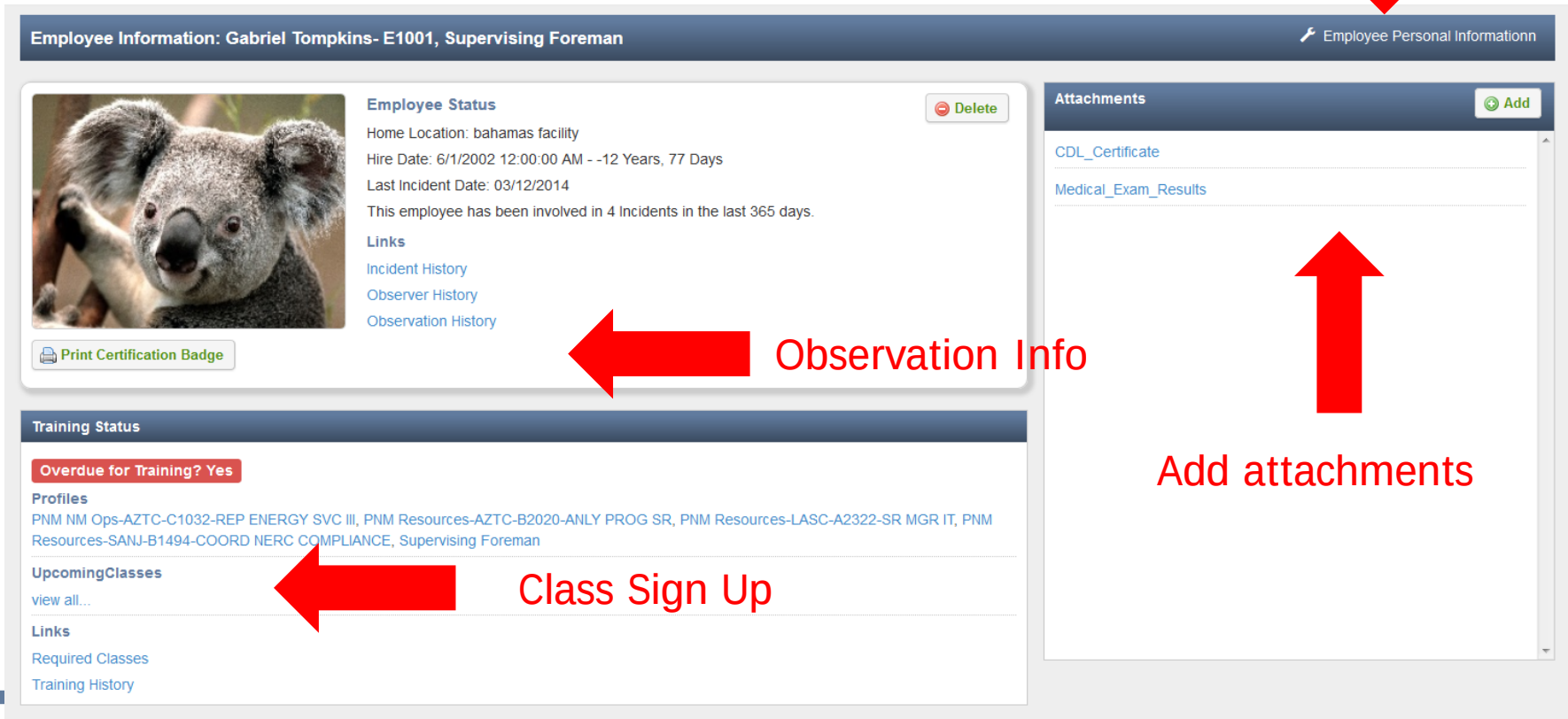
- Clare Epstein, Vice President of TRA
  - Experienced in Technology, Software Design
  - Assist clients in achieving training compliance
- Gabriel Tompkins, Project Manager
  - Expertise in software
  - Assist clients with implementation

Timeframe

- Beta sites by 5/28/2014
- All other sites by 6/20/2104

Employee Profile

Edit Basic Info.

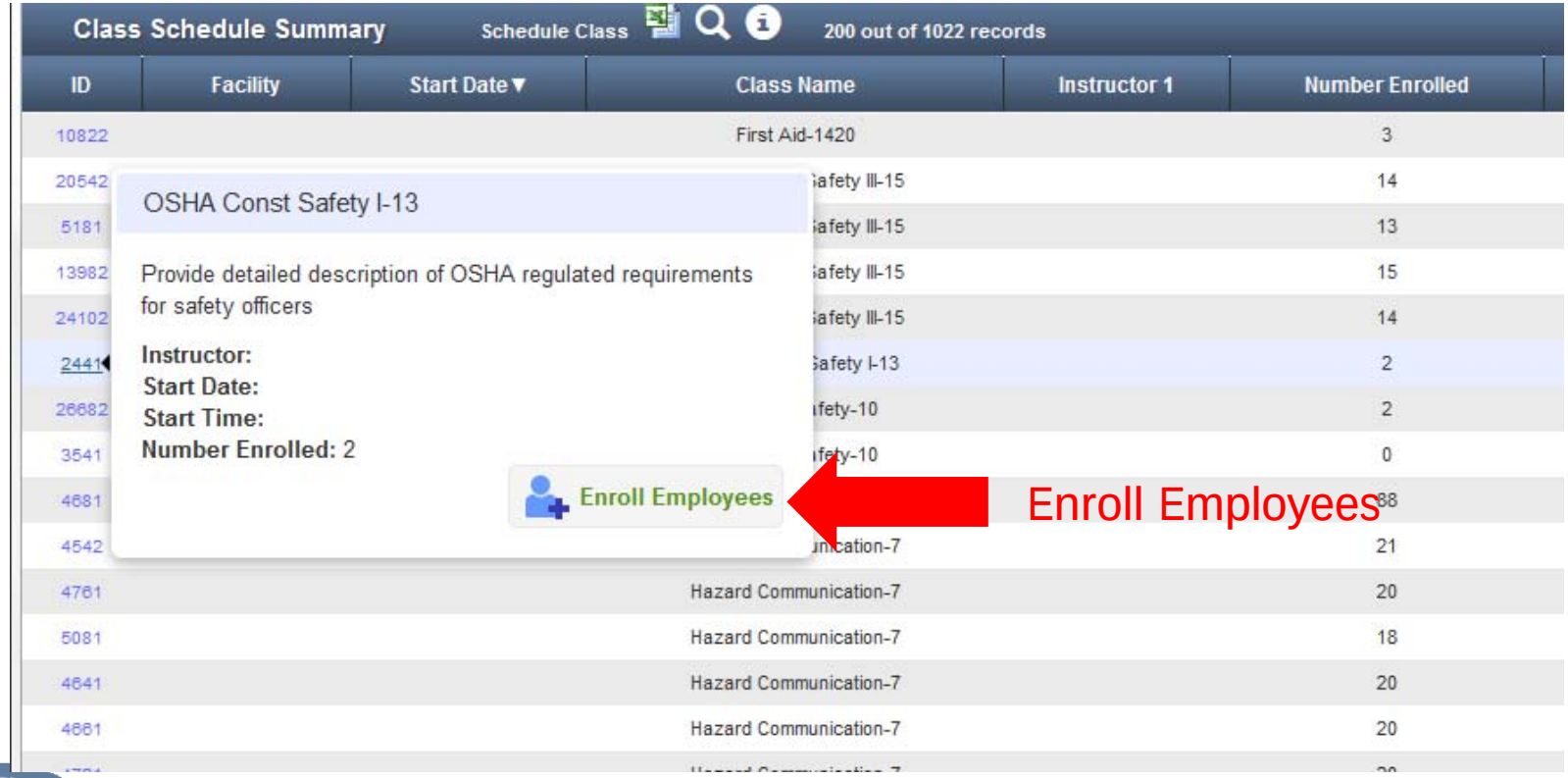


Observation Info

Add attachments

Class Sign Up

Training Schedule



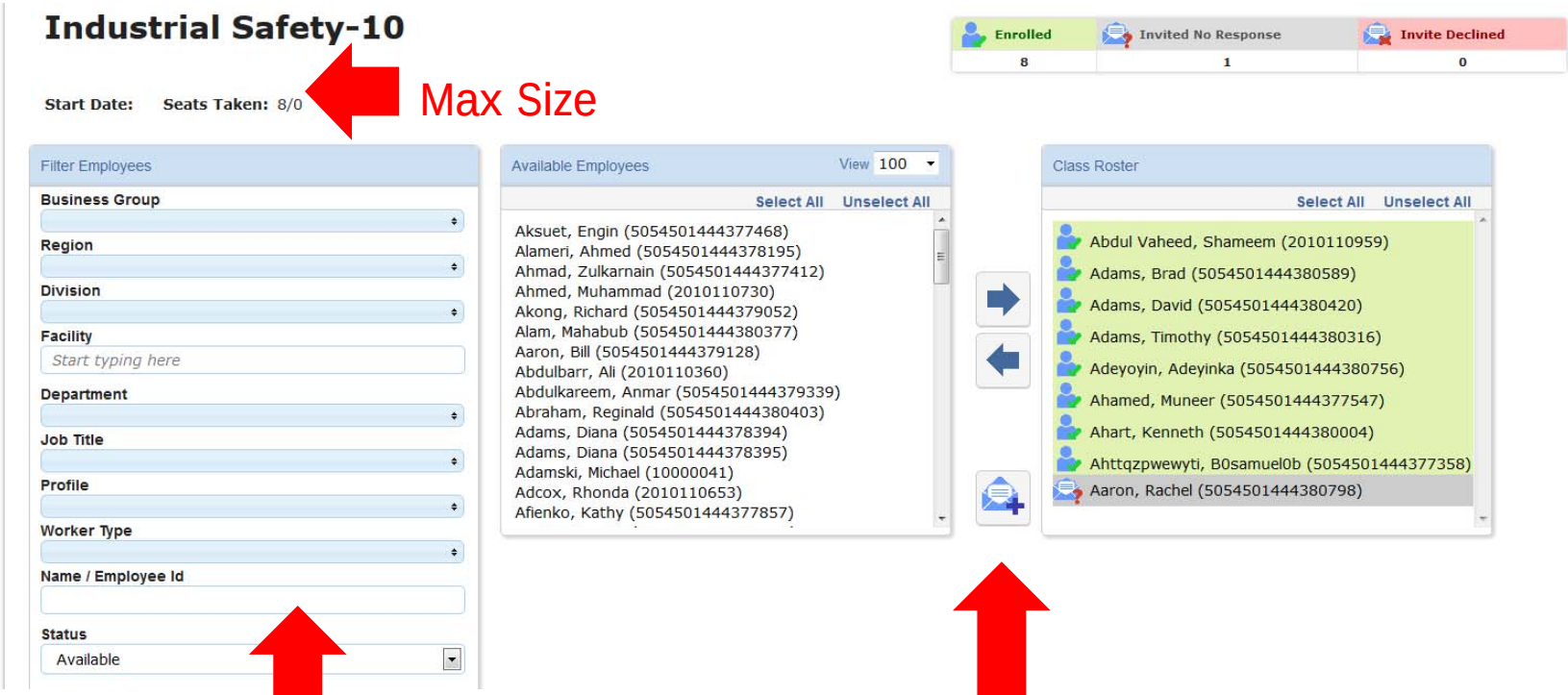
Training Schedule

Max Size	35
Invite/Enroll Employees	Update Class Roster/Results
Employees Invited	0
Employees Enrolled	2 Muneer Ahamed; Shameem Abdul Vaheed
Employees Attended	0
Employees Passed	0
Open Enrollment	☐

Max Size

Open Enrollment

Enrollment Wizard



Max Size

Easier and Additional Filters

Invite Option

Results Wizard

Roster Results

Easier Navigation

Save Successful

Save | Print All Certificates | Back

Industrial Safety-10

Attended Class	Passed Class
8	8

view 100

Brad Adams (5054501444380589)	☑	50.00	☑	05/19/2014	mm/dd/yyyy ☑
David Adams (5054501444380420)	☑	50.00	☑	05/19/2014	mm/dd/yyyy ☑
Timothy Adams (5054501444380316)	☑	50.00	☑	05/19/2014	mm/dd/yyyy ☑
Adeyinka Adeyoyin (5054501444380756)	☑	50.00	☑	05/19/2014	mm/dd/yyyy
b0SamueL0b AhTtQZPWeWYTI (5054501444377358)	☑	50.00	☑	05/19/2014	mm/dd/yyyy

Add Attachments

Class No Longer Required

Training Calendar

Upcoming Classes

(May 13, 2014 - June 13, 2014)

Calendar View

Open Enrollment -Self Enrollment

View All Classes

April 30th, 2014

Enroll Employees

Advanced Chemical Hygiene Officer

Status: **Enrolled** , Seats Left: 0 Close (-)

Advanced level course that explains procedures to become chemical hygiene officer.

Instructor: Chris Alves **Start Date:** 04/30/2014

Start Time: **End Date:** 05/30/2014

Enroll Employees

Set-Up 1

Status: **Enrolled** , Seats Left: 0 Expand (+)

May 19th, 2014

Enroll Employees

First Aid

Status: Not Enrolled , Seats Left: 0 Expand (+)

First Responder Training

Training Calendar

Upcoming Classes

(May 13, 2014 - June 13, 2014)

Calendar View

Open Enrollment -Self Enrollment

View All Classes

April 30th, 2014

Enroll Employees

Advanced Chemical Hygiene Officer

Status: **Enrolled** , Seats Left: 0 Close (-)

Advanced level course that explains procedures to become chemical hygiene officer.

Instructor: Chris Alves **Start Date:** 04/30/2014

Start Time: **End Date:** 05/30/2014

Enroll Employees

Set-Up 1

Status: **Enrolled** , Seats Left: 0 Expand (+)

May 19th, 2014

Enroll Employees

First Aid

Status: Not Enrolled , Seats Left: 0 Expand (+)

First Responder Training

Sharing and Saving Analysis Grids

Employee Injury Log - Missed Days

Open | Save | Save As | Refresh | Reset

Shared Reports

File Name	Date Modified	Created By	Delete Report
Public_Test Save 1	05/13/2014	Scott Kaminski	Delete

My Reports

File Name	Date Modified	Share Report	Delete Report
Missed Days	05/13/2014	Share	Delete

Additional Analysis Grids

- Employee Injury Log
- Incident Corrective Actions Log
- Observations Detail Log -New
- Observations Corrective Actions Log
- Training Log
- Additional Fields to Incident Log

Additional Analysis Grids

- Employee Injury Log
- Incident Corrective Actions Log
- Observations Detail Log -New
- Observations Corrective Actions Log
- Training Log
- Additional Fields to Incident Log

Additional Analysis Grids

Employee Injury Log

Employee Injury Log

Open | Save | Save As | Refresh | Reset

Export: Excel CSV PDF

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	Involved Employee Name	Incident Type	OSHA Recordable	Consequences of Injury/Illness	Body Part Affected	Nature of Injury	Root Cause	Report Status	Closed
FY14-0358	CLRF	5/13/2014	Private	Illness	No	None				Open	Open
FY14-0355	Mississippi Main	5/13/2014	Private	Injury	No					Open	Open
FY14-0357	Mississippi Main	5/13/2014	Private	Injury	No	None				Open	Open
FY14-0356	Mississippi Main	5/13/2014	Private	Injury	No					Open	Open
FY14-0354	Mississippi Main	5/13/2014	Private	Injury	Yes	Lost Time, Restricted	Abdomen, Buttocks, Body Systems and Multiple Body Systems	Amputation	Fatigue	Open	Open
FY14-0351	1111 main	5/8/2014	Private	Injury	Yes	Medical treatment beyond first aid	Brain	Concussion	Slippery Walking Surfaces	Ready for Approval	Open
FY14-0350	Cerone	5/8/2014	Private	Environmental Release	No					Open	Open
FY14-0348	Cerone	5/5/2014	Private	Environmental Release	No					Open	Open
FY14-0347	1111 main	5/5/2014	Private	Injury	No	None				Open	Open
[illegible]	1111 main	[illegible]	Private	Injury	Yes	Loss of consciousness	Brain	Concussion	Slippery Walking	Ready for	[illegible]

Additional Analysis Grids

Incident Corrective Actions Log

Incidents Corrective Action Log

Open | Save | Save As | Refresh | Reset

Export: Excel CSV PDF

Formula Layout Sort Filter Group Aggregate Chart Crosstab Paging

Table

1 2 3 4 5 6 7 8 9 10

Incident Number	Corrective Action System ID	Facility	Date of Incident	Description of Incident	Responsible Party	Estimated Start Date	Estimated Completion Date	Actual Completion Date	Status
FY14-0354	28804	Mississippi Main	5/13/2014	Test Incident	Shikha Failbus	5/13/2014	5/20/2014		Open
FY14-0351	28744	1111 main	5/8/2014	Initial Incident Description	Chapman Nitta	5/8/2014	5/15/2014	5/8/2014	Complete
FY14-0346	28704	1111 main	5/2/2014	Initial Incident Description	Tyrone Jeffery	5/2/2014	6/6/2014	5/2/2014	Complete
FY14-0343	28626	1111 main	4/30/2014	Initial Incident Description	Scott Testing	4/30/2014	5/2/2014	4/30/2014	Complete
FY14-0342	28604	1111 main	4/29/2014	Initial Incident Description	Scott Testing	4/29/2014	5/2/2014	4/29/2014	Complete
FY14-0340	28544	Cerone	4/25/2014	tripped	Chris Alves	4/25/2014	8/1/2014	4/23/2014	Complete
FY14-0338	28524	1111 main	4/24/2014	Initial Incident Description	Tyrone Jeffery	4/24/2014	4/29/2014	4/24/2014	Complete
FY14-0337	28484	Mississippi Main	4/19/2014	just happened	Gabriel Tompkins	4/15/2014	4/16/2014	5/3/2014	Open
FY14-0325	28405	Indiana, Pennsylvania	4/11/2014	11111	Gabriel Tompkins	11/11/1980	11/11/1981		Open
FY14-0323	28384	Deerfield	4/10/2014	ddddddddddddddddddddddd	Zachary Owen				Open
FY14-0324	28387	Cerone	4/10/2014	222	Luke Zeng	4/1/2014	4/9/2014	4/12/2014	Open
FY14-0321	28324	1111 main	4/7/2014	Initial Incident Description	Joshua Puricelli	4/7/2014	4/11/2014	4/7/2014	Complete
FY14-0318	28304	Mississippi Main	4/1/2014	this and that.	oleg oleg	4/1/2014	4/2/2014		Open

Additional Analysis Grids

Observations Detail Log -New

Observation Details Log

Open | Save | Save As | Refresh | Reset

Export: Excel CSV PDF

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	Category	SubCategory	Safe Act	Unsafe Act	Follow Up Required
10422	Mississippi Main	BBS Observation	mike dowhy	6/11/2014		BPM	Clear of Hazards	1		No
10422	Mississippi Main	BBS Observation	mike dowhy	6/11/2014		BPM	Eye on Path	1	5	Yes
10422	Mississippi Main	BBS Observation	mike dowhy	6/11/2014		BPM	Clear of pinch points, sharp edits and hot surfaces		1	No
10782	1111 main	Scantron Demo	Clare Epstein	5/2/2014	Gabriel Tomkins	3.0 Workplace Conditions	3.3 Hot Surface	1		Yes
10802	1111 main	Safety Observation Report	Chris Alves	5/2/2014		A - GENERAL/ENVIRONMENT	A2 General Housekeeping & Dust Control	3		No
10782	1111 main	Scantron Demo	Clare Epstein	5/2/2014	Gabriel Tomkins	4.0 Transportation	4.1 Cell Phone Use		1	No
10802	1111 main	Safety Observation Report	Chris Alves	5/2/2014		A - GENERAL/ENVIRONMENT	A1 Project Setup (signage/postings/first aid)		1	No
10802	1111 main	Safety Observation Report	Chris Alves	5/2/2014		4.0 Transportation	4.1 Cell Phone Use	1		No

Additional Analysis Grids

Observations Corrective Actions Log

Observations Corrective Actions Log

Open | Save | Save As | Refresh | Reset

Export: Excel CSV PDF

Formula Layout Sort Filter Group Aggregate Chart Crosstab Paging

Table

1 2 3 4

Observation System ID	Corrective Action System ID	Facility	Checklist	Primary Observer Name	Responsible Party	Estimated Start Date	Estimated Completion Date	Actual Completion Date	Corrective Action Status
10782	28685	1111 main	Scantron Demo	Clare Epstein		5/12/2014	5/20/2014		Open
10762	28644	1111 main	BBS Observation	Gabriel Tompkins		5/15/2014	5/15/2014		Open
10723	28564	Mississippi Main	Forklift Operations Observation	eyal leybovich					Open
10323	27764	1111 main	Safety Observation Report	Chris Alves		2/19/2014	2/21/2014	2/19/2014	Complete
9702	26545	[Undefined]	Basic Observation Checklist	Daniel Didier		11/20/2013	11/21/2013		Open
9582	25966	Alaska Final Assembly	BBS Observation	Joshua Puricelli		10/16/2013	10/21/2013		Open
9402	25604	1111 main	Loparex	Gabriel Tompkins		9/16/2013	9/30/2013	9/30/2013	Complete
8922	24685	1111 main	Safety Observation Report	Chris Alves		7/9/2013	8/9/2013	7/10/2013	Complete
8922	24684	1111 main	Safety Observation Report	Chris Alves		7/9/2013	7/16/2013	7/9/2013	Complete
8782	24424	1111 main	BBS Observation	Chris Alves		6/17/2013	6/5/2013		Open
8782	24425	1111 main	BBS Observation	Chris Alves					Complete
8302	23604	[Undefined]	Basic Observation	Chris Alves					Open

Additional Analysis Grids

Training Log

Training Log Report

Open | Save | Save As | Refresh | Reset

Displaying Records For The Current Year

Get All Records

Export: Excel CSV PDF

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

Table

1 2 3 4 5 6 7 8 9 10

Facility	Class Schedule ID	Class Name	First Name	Last Name	Start Date	Attended Class	Pass Class	Date Attended	Hours Attended
Alaska Final Assembly	26982	A1 5.4 Testing Class-3340	Joshua	Puricelli	5/30/2014				0.00
MAIN	26982	A1 5.4 Testing Class-3340	Joe	Giradi	5/30/2014				0.00
test	26982	A1 5.4 Testing Class-3340	Kevin	Blanton	5/30/2014				0.00
CD1	26982	A1 5.4 Testing Class-3340	Stephen	Ehrlich	5/30/2014				0.00
Clare's Location	26982	A1 5.4 Testing Class-3340	Harold	Gutierrez	5/30/2014				0.00
Washington	26982	A1 5.4 Testing Class-3340	Aaron	Crockett Jr.	5/30/2014				0.00
1111 main	26982	A1 5.4 Testing Class-3340	Patricia	Paxson	5/30/2014				0.00
Oxy Site #1	26982	A1 5.4 Testing Class-3340	Chris	Oxy2	5/30/2014				0.00
Oxy Site #1	26982	A1 5.4 Testing Class-3340	Brad	Oxy	5/30/2014				0.00
Clare's Location	26982	A1 5.4 Testing Class-3340	Henry	Smith	5/30/2014				0.00
Eagle & Phoenix Mills	26982	A1 5.4 Testing Class-3340	Ron	Rowe	5/30/2014				0.00
Corporate Offices	26982	A1 5.4 Testing Class-3340	Emily	Williams	5/30/2014				0.00
1111 main	26982	A1 5.4 Testing Class-3340	Clare	Epstein	5/30/2014				0.00
Mississippi Main	26982	A1 5.4 Testing Class-3340	shameem	abdul vaheed	5/30/2014				0.00

Additional Analysis Grids

Incident Log Additional Fields

Incident Log Report

Open | Save | Save As | Refresh | Reset

Export: Excel CSV PDF

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	Involved Employee Name	Involved Employee Title	Severity	Probability	Risk Assessment	Date Submitted	Description of Incident	Worker's Comp Claims	Auto Claims	General Claims
FY14-0355	Mississippi Main	05/13/2014	Private		1. Low	3. Possible	Low	05/13/2014	Test Incident	1	0	0
FY14-0358	CLRF	05/13/2014	Private	Clerk				05/13/2014	test	0	0	0
FY14-0357	Mississippi Main	05/13/2014	Private	Clerk	1. Low	2. Unlikely	Low	05/13/2014	Test	0	0	0
FY14-0356	Mississippi Main	05/13/2014	Private	Clerk	1. Low	3. Possible	Low	05/13/2014	Test Incident	0	0	0
FY14-0354	Mississippi Main	05/13/2014	Private		1. Low	3. Possible	Low	05/13/2014	Test Incident	0	0	0
FY14-0352	The Hughston Clinic	05/09/2014	John Doe	packer	3. Moderate	3. Possible	Serious	05/09/2014	employee put foot in grinder	0	0	0
FY14-0353	1111 main	05/09/2014	Clare Epstein	Plant Operations Manager	1. Low	2. Unlikely	Low	05/09/2014	near miss while working	0	0	0
FY14-0350	Cerone	05/08/2014	Private	Clerk				05/08/2014	test	0	0	0

New Rate Report
First Aid and Near Misses

Near Miss & First Aid Incident Rates

Business Group: All Region: All Division: All Facility: All

Asset Group: All Asset ID: All Worker Type: All Department: All Incident Type: All

Date Range 1/2014 - 5/2014

Business Group: Injection Region: North

Division	Hours Worked	All Incidents		No Employee Injuries		All Employee Injuries		First Aid Injuries	
		Incidents	Rate	Incidents	Rate	Incidents	Rate	Incidents	Rate
Printing & Multifunction	29,953	0	0.00	0	0.00	0	0.00	0	0.00
Total	**29,953**	**0**	**0.00**	**0**	**0.00**	**0**	**0.00**	**0**	**0.00**

Business Group: Water Region: East - Water

Division	Hours Worked	All Incidents		No Employee Injuries		All Employee Injuries		First Aid Injuries	
		Incidents	Rate	Incidents	Rate	Incidents	Rate	Incidents	Rate
Construction	410,000	14	6.83	2	0.98	12	5.85	0	0.00
Total	**410,000**	**14**	**6.83**	**2**	**0.98**	**12**	**5.85**	**0**	**0.00**

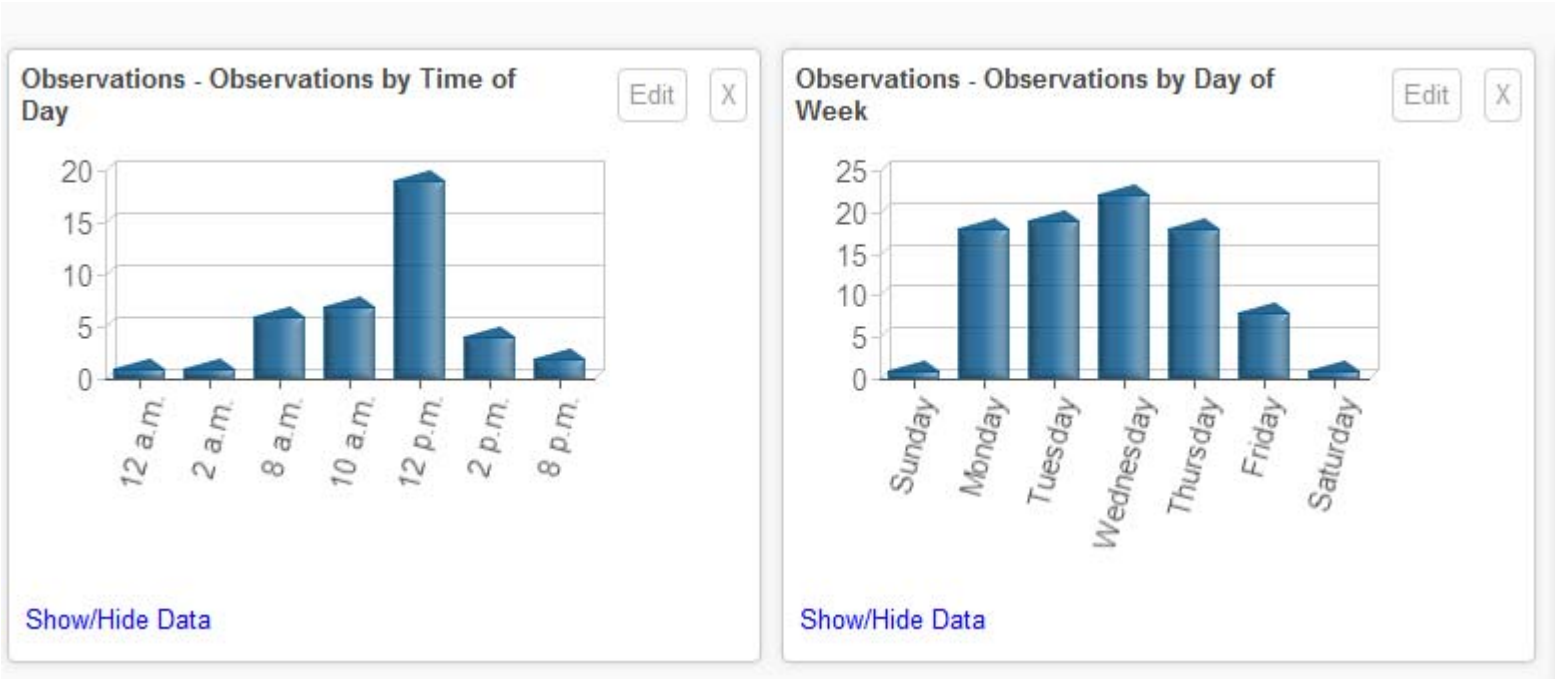
Business Group: Injection Region: North Division: Printing & Multifunction

Facility	Hours Worked	All Incidents		No Employee Injuries		All Employee Injuries		First Aid Injuries	
		Incidents	Rate	Incidents	Rate	Incidents	Rate	Incidents	Rate
Facility Injection North Printing & Multifunctio	29,953	0	0.00	0	0.00	0	0.00	0	0.00
Total	**29,953**	**0**	**0.00**	**0**	**0.00**	**0**	**0.00**	**0**	**0.00**

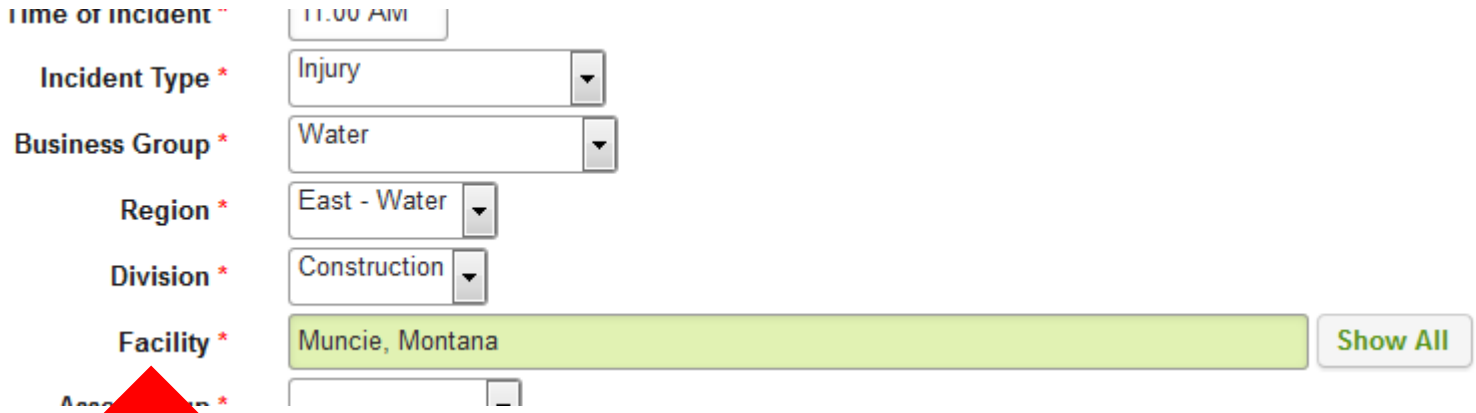
Business Group: Water Region: East - Water Division: Construction

Facility	Hours	All Incidents	No Employee Injuries	All Employee Injuries	First Aid Injuries

New Observation Dashboards



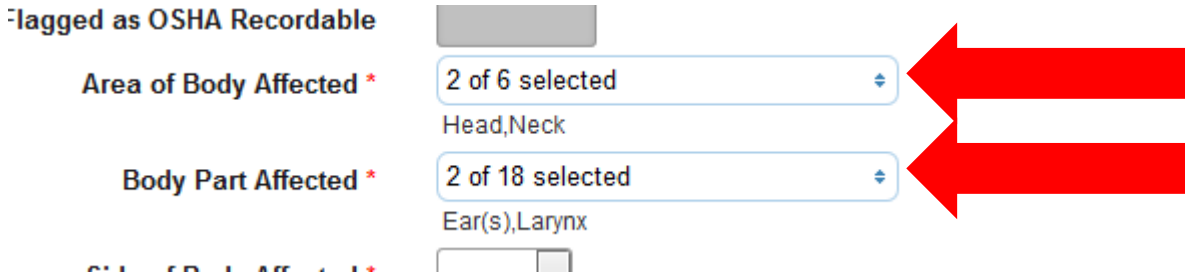
Facility Search



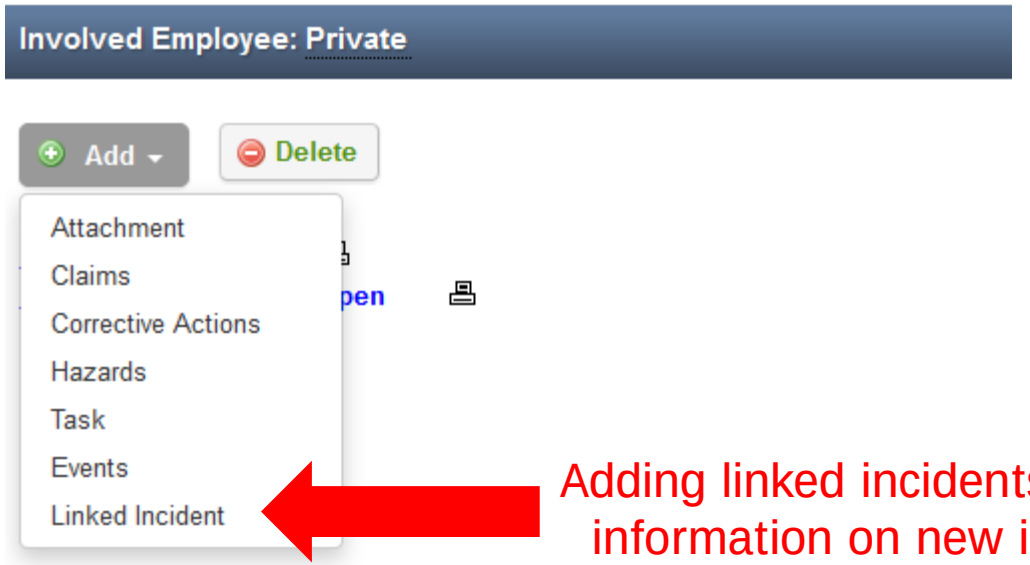
Can select facility and upper levels of hierarchy will auto fill

Show All to display facilities within hierarchy

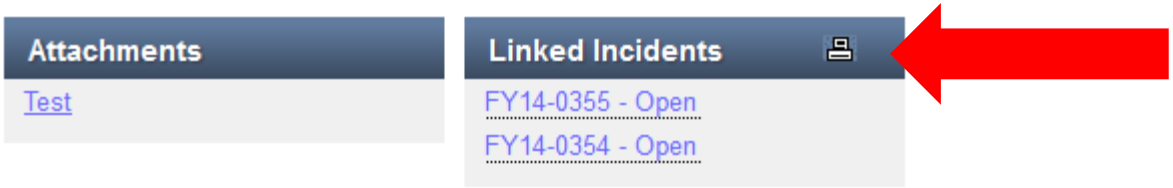
Multi-select Body Part(s)



Linked Incidents



Adding linked incidents auto fills key information on new incident form



Print incident reports for all incidents

Monthly Statistics Summary Screen

Monthly Statistics Summary 160 out of 160 records

System ID	Facility	Current Month Hours Worked	Last Month Hours Worked	Current Year Hours Worked	Last Year Hours Worked	Years With Data
2401	Greenville Plant	0	0	0	0	
1141	New York City	0	0	0	0	2007
1881	East Alton Mill	0	0	0	0	2009, 2011
1921	KM Industrial	0	0	0	0	
161	Mississippi Main	70000	70000	350000	0	2002, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2014
162	LA Cargo	0	0	0	0	2003, 2004, 2005, 2006, 2009
182	Orlando	0	0	0	0	2008, 2010
183	Sao Paulo	0	0	0	0	2009
184	Jacksonville	0	0	0	0	2010, 2011
187	Washington	0	0	0	0	2008
188	CD1	0	0	0	0	2005, 2011
190	Santa Ana	0	0	0	0	
191	Mexico City	0	0	0	0	2005
192	LaGrange	0	0	0	0	2010
193	San Luis Obispo	0	0	0	0	2005
196	World Trade Center Site -Turner	0	0	0	0	
197	South East Express	0	0	0	0	2008
198	World Trade Center Site	0	0	0	0	
199	Troy	0	0	0	0	
202	Crystal Lake	0	0	0	0	2007, 2010

Additional Columns

Child Forms

Witness 1

Remove Witness 1

Name	Scott Smith
Phone Number	123-456-7891
Was Witness Interviewed?	Yes
Witness Statement*	Look at this new witness form

Ability to delete by Items

Witness 2

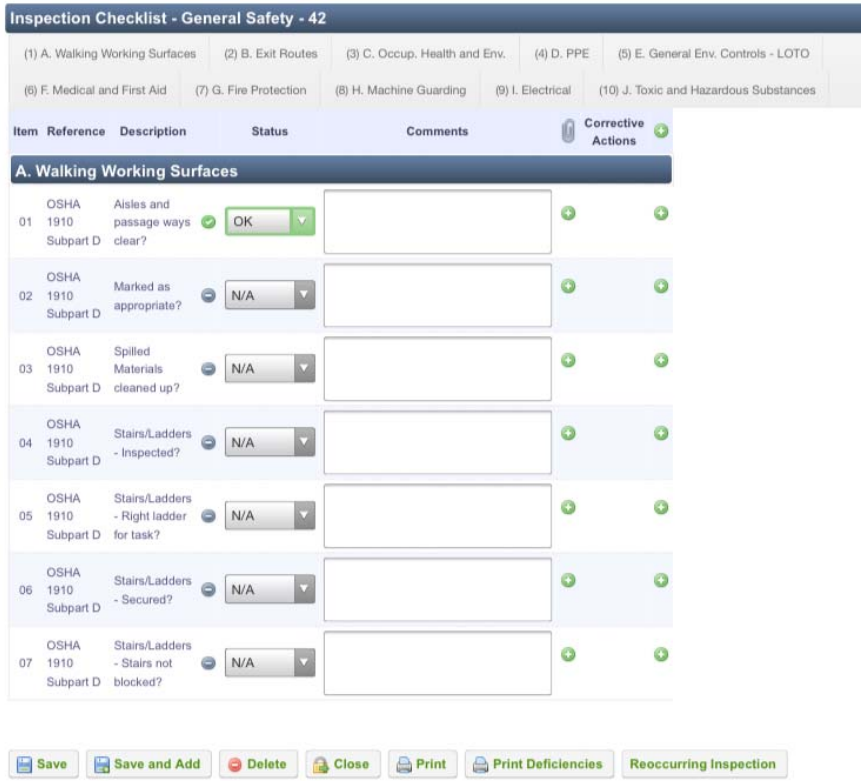
Remove Witness 2

Name	
Phone Number	
Was Witness Interviewed?	
Witness Statement*	

Add Witness

Easier to Add Items

Mobile Updates



Only Display 1 Topic or 20 Items

Resources

- Release Notes:
  - Knowledge Base -5.4 Updates and PowerPoint
  - Additional Knowledge Base Articles
- Recorded Webinar:
  - http://www.youtube.com/user/IndustrySafeSoftware
- Telephone Support

Questions

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