

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.



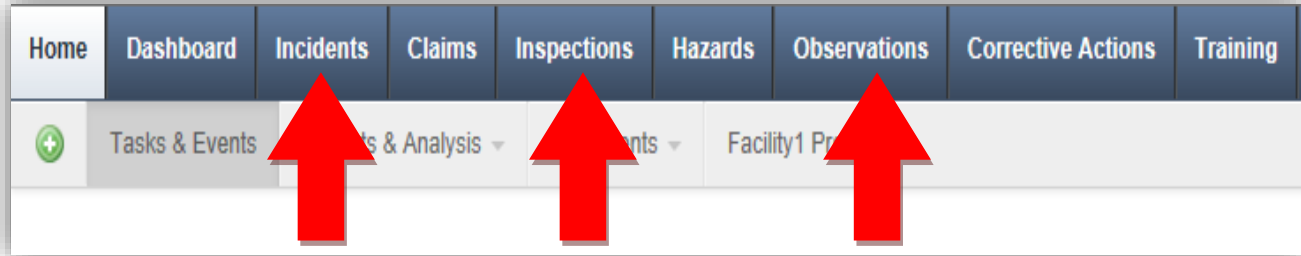
1.3 Enter your username and password and click the **Submit** button.



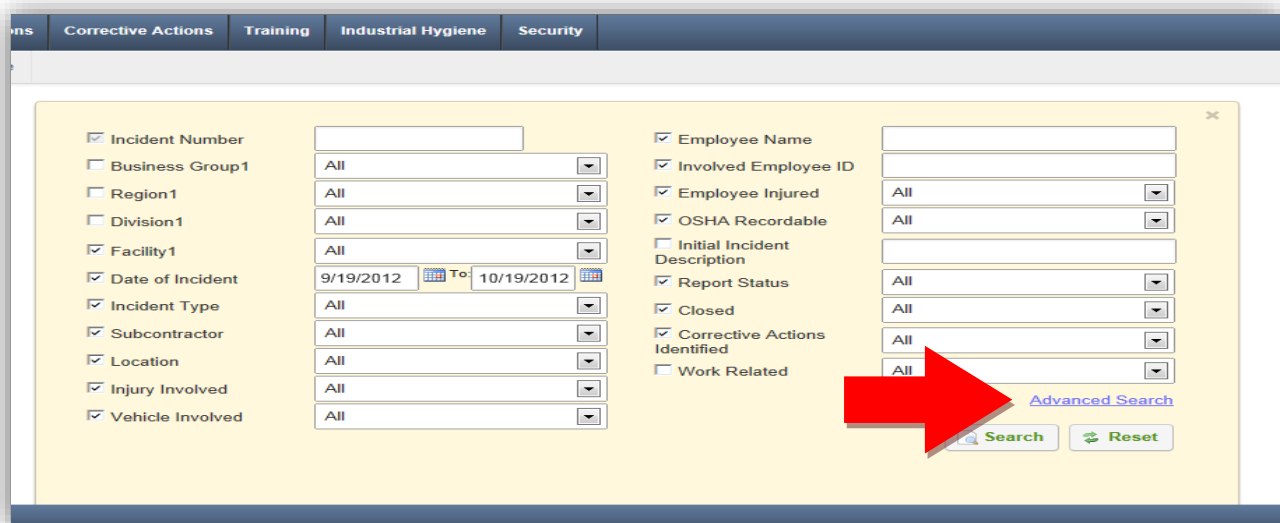
Note: If you forget your username or password, click the **Forgot your password?** button to have your username and a new password emailed to you. The next time you log in you will be asked to change your password.

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.

The screenshot displays the 'Advanced Search' window in the IndustrySafe application. The window has a dark blue header with tabs for 'ns', 'Corrective Actions', 'Training', 'Industrial Hygiene', and 'Security'. The main area is yellow and contains two columns of search criteria, each with a checked checkbox and a corresponding input field or dropdown menu. The criteria include Incident Number, Business Group1, Region1, Division1, Facility1, Date of Incident (with a date range from 9/19/2012 to 10/19/2012), Incident Type, Subcontractor, Location, Injury Involved, Vehicle Involved, Employee Name, Involved Employee ID, Employee Injured, OSHA Recordable, Initial Incident Description, Report Status, Closed, Corrective Actions Identified, and Work Related. A red arrow points to a dropdown menu that is open, showing options: 'Incidents' (highlighted in blue), 'Investigation', 'Employees', 'Security', 'Safety', and 'Environmental'. A 'Reset Filters' button is also visible next to the dropdown. The bottom of the window shows a table header with columns: 'Type', 'Subcontractor', 'Location', 'Injury Involved', 'Vehicle Involved', 'Employee Name', 'Involved Employee ID', and 'Employee Inju'.

3 Searching the Form

3.1 Enter your search criteria.

The screenshot shows a search form titled "Basic Information". On the left, there is a vertical list of checkboxes, all of which are checked. Below this list are two links: "Check All" and "Uncheck All". The main form area contains several search criteria:

- Involved Employee Name: Text input field
- Involved Employee ID: Text input field
- Involved Employee Title: Text input field
- Date of Incident: Range selector with "From:" and "To:" labels and date pickers.
- Time of Incident: Text input field containing "HHMM".
- Incident Type: Dropdown menu with "Employee Injury" selected. A red arrow labeled "1" points to this dropdown.
- Business Group1: Dropdown menu.
- Region1: Dropdown menu.
- Division1: Dropdown menu.
- Facility1: Dropdown menu.
- Facility Type: Text input field.
- Facility Category: Text input field.
- Subcontractor: Dropdown menu with "Staff" selected. A red arrow labeled "2" points to this dropdown.

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.

Basic Information

Include in Export
[Check All](#) [Uncheck All](#)

<input checked="" type="checkbox"/>	Involved Employee Name	<input type="text"/>
<input checked="" type="checkbox"/>	Involved Employee ID	<input type="text"/>
<input checked="" type="checkbox"/>	Involved Employee Title	<input type="text"/>
<input checked="" type="checkbox"/>	Date of Incident	From: <input type="text" value="mm/dd/yyyy"/> To: <input type="text" value="mm/dd/yyyy"/>
<input checked="" type="checkbox"/>	Time of Incident	<input type="text" value="HHMM"/>
<input checked="" type="checkbox"/>	Incident Type	<input type="text" value="Employee Injury"/>
<input checked="" type="checkbox"/>	Business Group1	<input type="text"/>
<input checked="" type="checkbox"/>	Region1	<input type="text"/>
<input checked="" type="checkbox"/>	Division1	<input type="text"/>
<input checked="" type="checkbox"/>	Facility1	<input type="text"/>
<input checked="" type="checkbox"/>	Facility Type	<input type="text"/>
<input checked="" type="checkbox"/>	Facility Category	<input type="text"/>
<input checked="" type="checkbox"/>	Subcontractor	<input type="text" value="Staff"/>

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.

New Incident Advanced Search Form

Basic Information

Include in Export
[Check All](#) [Uncheck All](#)

<input checked="" type="checkbox"/>	Involved Employee Name	<input type="text"/>
<input checked="" type="checkbox"/>	Involved Employee ID	<input type="text"/>
<input checked="" type="checkbox"/>	Involved Employee Title	<input type="text"/>
<input checked="" type="checkbox"/>	Date of Incident	From: <input type="text" value="mm/dd/yyyy"/> To: <input type="text" value="mm/dd/yyyy"/>
<input checked="" type="checkbox"/>	Time of Incident	<input type="text" value="HHMM"/>
<input checked="" type="checkbox"/>	Incident Type	<input type="text" value="Employee Injury"/>

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.

Incident Summary 1 out of 1 records

Incident Number	Facility1	Date of Incident	Incident Type	Subcontractor	Location	Injury Involved	Vehicle Involved	Employee Name	Involved Employee ID
FY13-0031		10/18/2012	Employee Injury	Staff		No	No	Scott Kaminski	872

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.

New Incident Advanced Search Form

Buttons: Search, Cancel, Reload Last Search, Load Saved Search, Save, Save As

Basic Information

Include in Export
[Check All](#) [Uncheck All](#)

Involved Employee Name

Involved Employee ID

Involved Employee Title

Red arrows point to the 'Load Saved Search' button and the four input fields for 'Involved Employee Name', 'Involved Employee ID', 'Involved Employee Title', and an unlabeled field.

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.

Search Criteria Manager

Saved Search Criteria
Click on a title below to use that search.

Facility- New Mexico search	Rename	Delete
New Search 1	Rename	Delete
Search- August 15th 2012	Rename	Delete

Buttons: Cancel, Save

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.

