

# IndustrySafe Safety Management Software

## Quick Start Set-Up Guide

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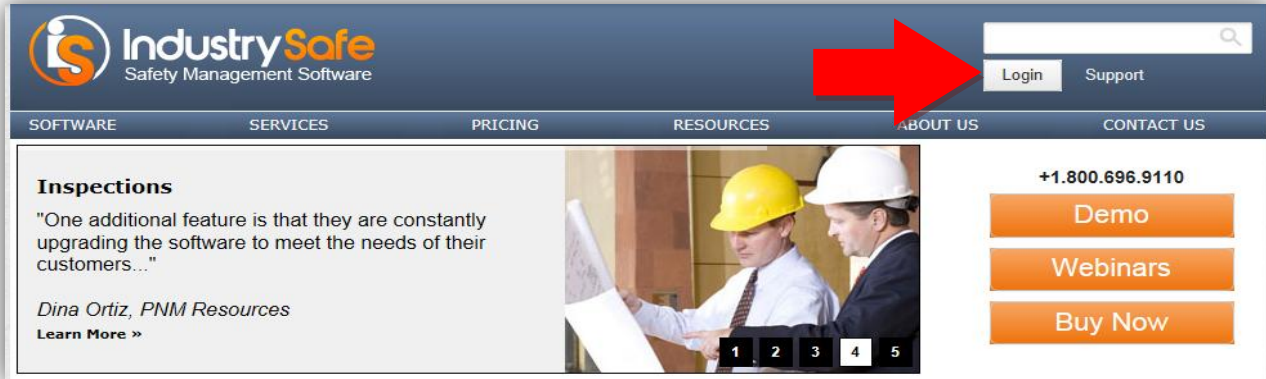


This guide describes the basic steps necessary to setup your IndustrySafe Safety Management Software.

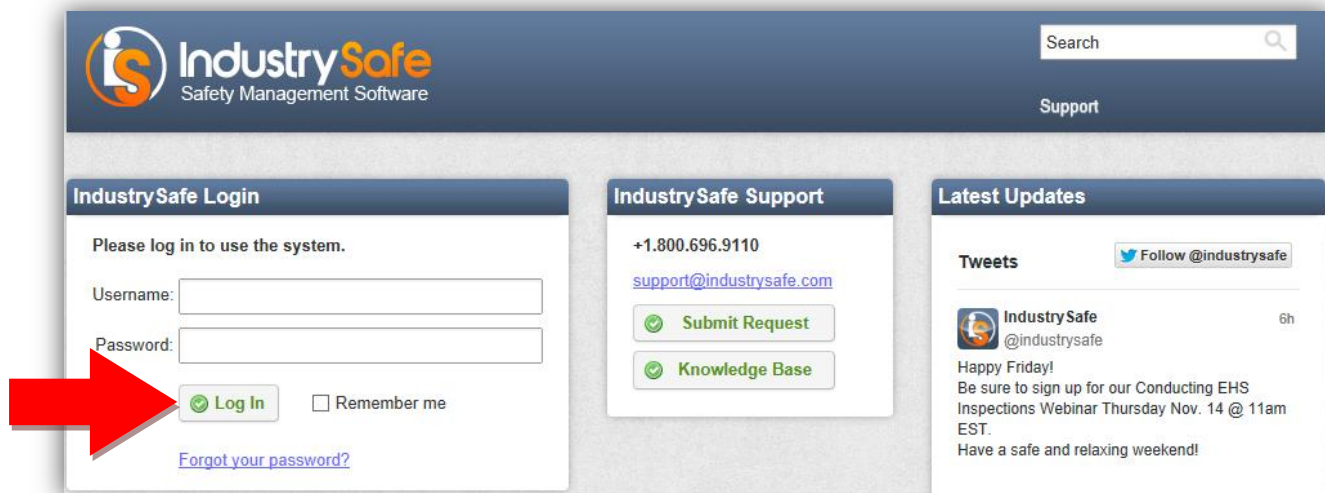
1. Log into IndustrySafe
2. Set up your hierarchy
3. Import employee data
4. Set up users
5. Configure recording forms and drop down fields
6. Brand your IndustrySafe site
7. Check browser settings

## Step 1: Log Into IndustrySafe

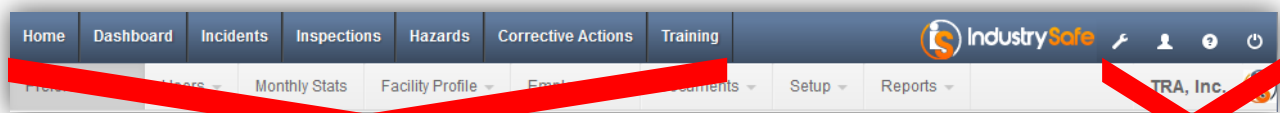
To log into the IndustrySafe Safety Management Software, browse to <http://www.industrysafe.com> and click on the Login button.



This will open the IndustrySafe login page. If you wish, you may bookmark this page. Enter your user name and password and click the Submit button to log into IndustrySafe. If you ever forget your password, you may click the "Forgot your password?" link to have a temporary password emailed to you. The first time you log into IndustrySafe, you will be asked to change your password.



You will then be logged into IndustrySafe. The menu bar at the top contains links to the IndustrySafe Modules, Administrative/System Functions, Account Info, and Help.



**Modules**

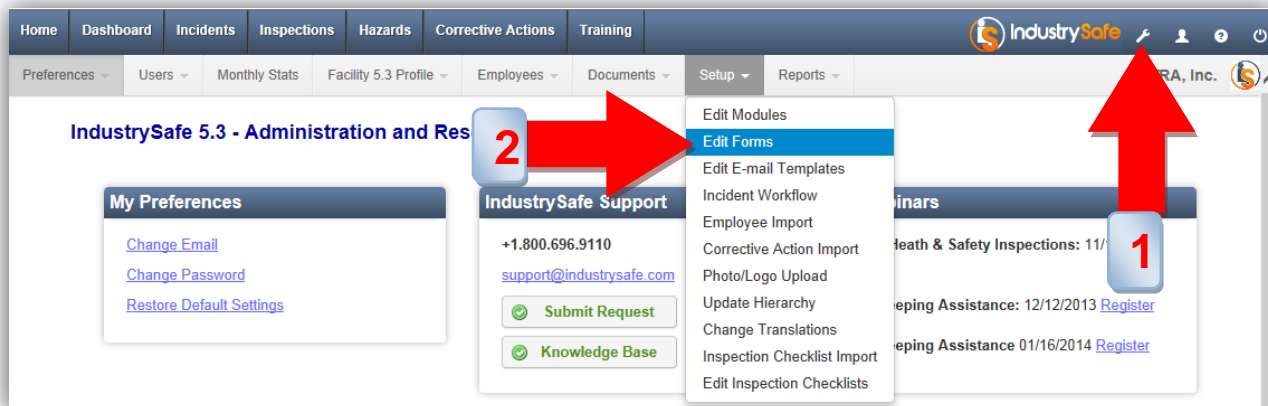
**System Functions,  
Account Info, & Help**

## Step 2: Set Up Your Hierarchy

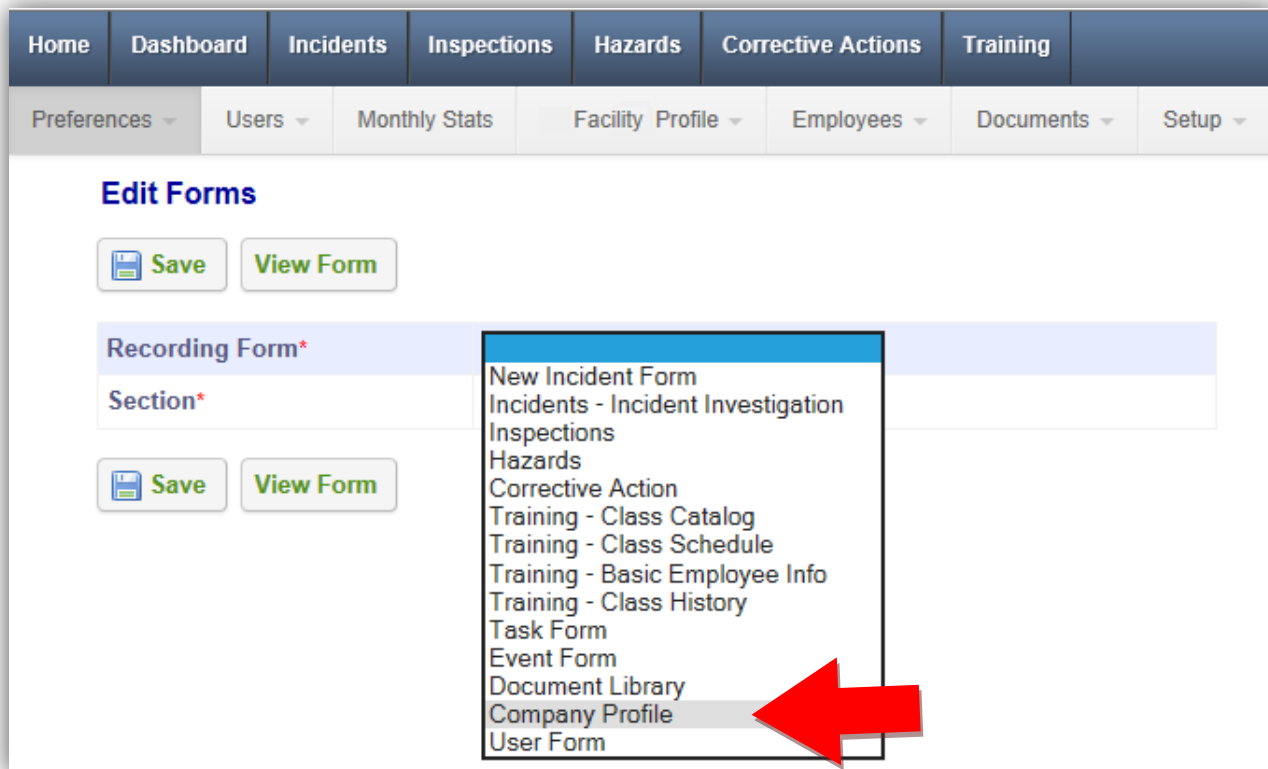
To setup your company's hierarchy, you will need to determine how many locations you have, how you want to refer to them (facility, location, project, etc.), and if they are grouped into regions or divisions.

### Configure Hierarchy Layers

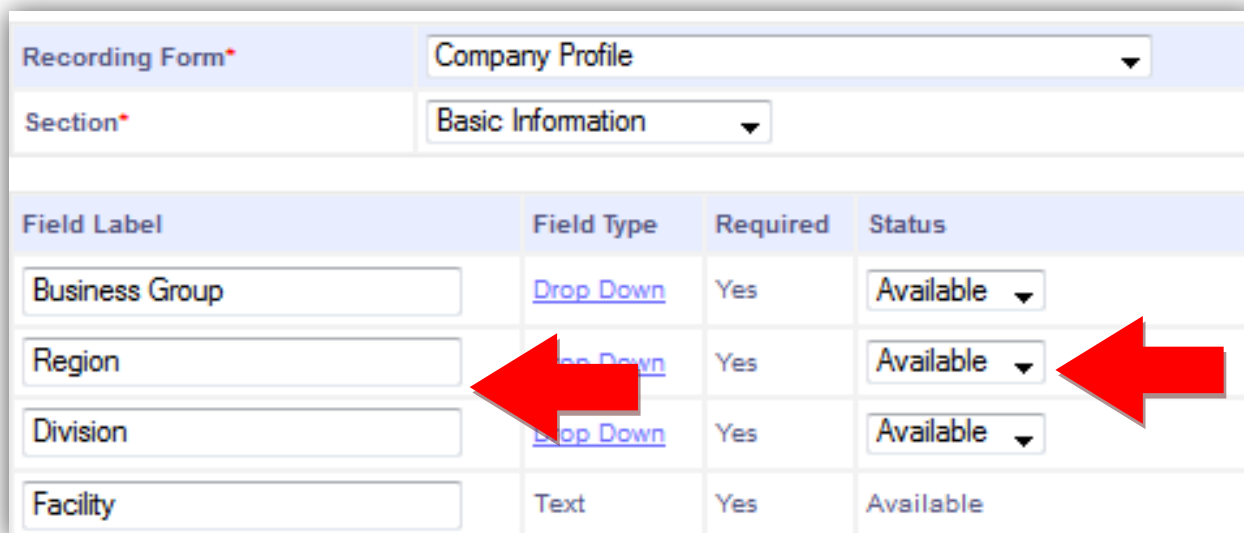
To configure layers of the hierarchy, click on the **System Functions** icon in the top navigation menu. Under Setup, select the **Edit Forms** option.



This Edit Forms page will open. Select Company Profile for the Recording From and Basic Information for the section.



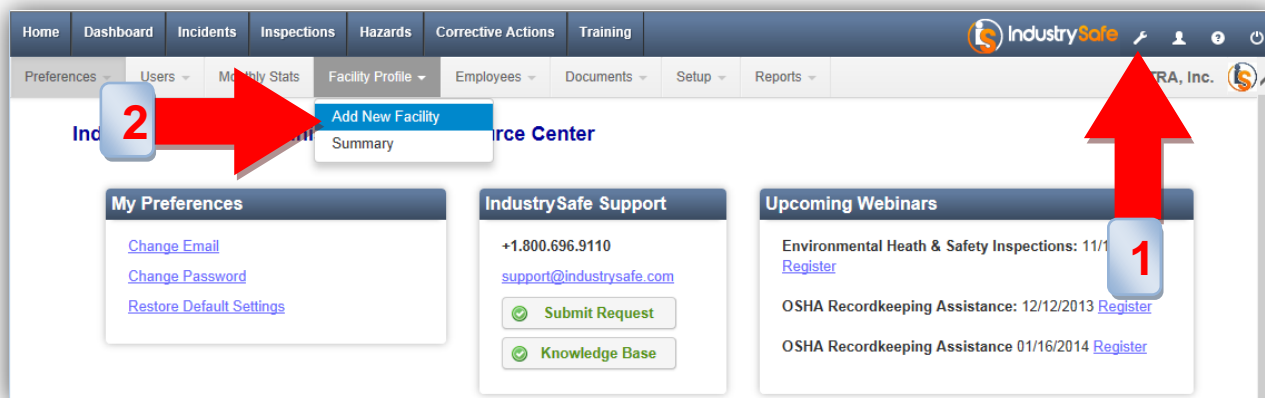
On this page, you may enable any of the layers you wish to use and change the field labels to match your organization.





Field Label	Field Type	Required	Status
Business Group	Drop Down	Yes	Available
Region	Drop Down	Yes	Available
Division	Drop Down	Yes	Available
Facility	Text	Yes	Available

### Enter Locations/Facilities

To enter your locations or facilities in IndustrySafe, click on the **System Functions** icon in the top navigation menu. Under Facility Profile, select the **Add New Facility** option



For each facility, enter the is the Name, City, and State. You will be able to fill in the rest of the fields at a later time. The fields designated as OSHA 300 fields are used to populate the OSHA 300 and 300a reports. These may be left blank or completed at a later time.

**Basic Information**   [Top](#)

**Facility \***

**Corporate Location?**

☐

Only one location may be identified as the corporate location.

**Latitude**

**Longitude**

**Get Current Location**

**Street Address \***

OSHA 300

**Street Address 2**

**City \***


OSHA 300

**County \***

OSHA 300

**State \***

OSHA 300



**Country**

**Zip Code \***

OSHA 300

**Phone Number**

**Industry Description**

## Step 3: Import Employee Data

In order to track incidents, observations, and training in IndustrySafe, you need to import employee data into the system. IndustrySafe provides a wizard in System Functions to import employee data from an excel spreadsheet. For each employee, you must include a unique Employee ID and a first or last name. Other recommended fields include Job Title, Location/Facility, Worker Type, Hire Date and Birth Date.

[>> Template for Employee Import Wizard](#)

Before importing employee data into IndustrySafe, you will first need to determine how many employees you need to import.

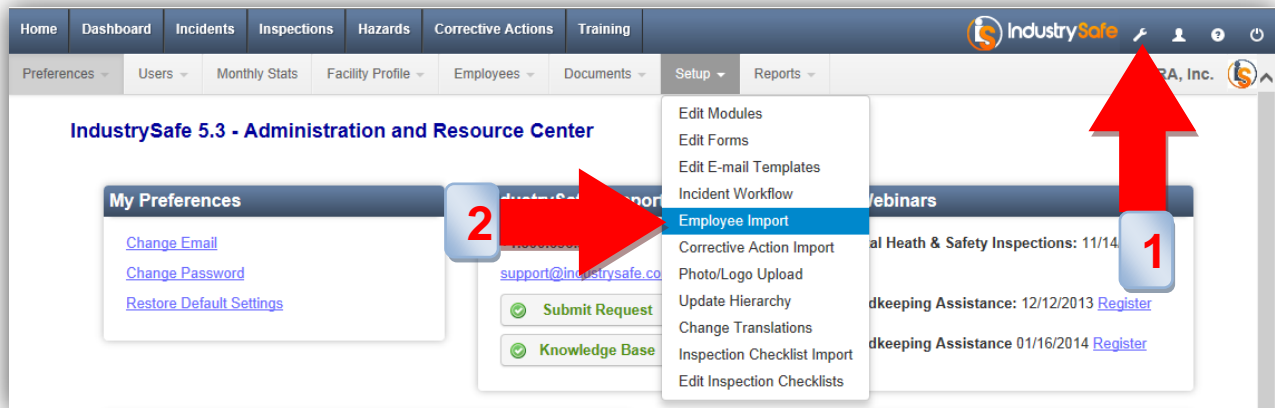
- If the number is under 800: upload an excel spreadsheet with your employee data on it to the Employee Import Wizard.
- If the number is over 800, the Employee Import Wizard will work the same as before, however you will have to break up your employee data in Excel before using the Wizard as there is an 800 employee cap per import.

If you do not want to utilize the Employee Import Wizard or wish to automate the import of employee data, we offer an automated employee data import service. More information on the import service may be found here

### >> Automated Employee Import Service

### Import Employee Data using the Employee Import Wizard

To import employee data using the Employee Import Wizard, click on the **System Functions** icon in the top navigation menu. Under Setup, select the **Employee Import** option.



The employee import wizard will open. Follow the instructions to import your employee data.

**Employee Data Import Wizard**  
**Step 1 of 4: Import Employee Data**

The Employee Data Import Wizard allows you to import Basic Employee Information. The Wizard allows you to add new employees and update existing employee's information.

Follow these simple steps to import your employee information:

➡ Continue

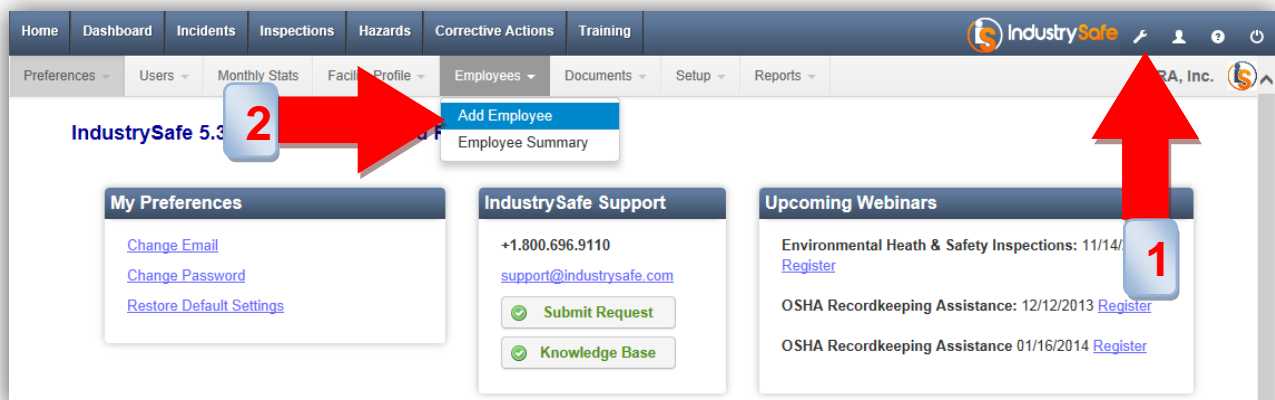
1.	View your employee data in its originating application.
2.	Identify which employees you wish to include in the import. You can include 800 or fewer employees in a single import.
3.	Select Save As or Export, typically in the File Menu.
4.	Save the File as an Excel (.xls) document.
5.	Ensure that each column has a header and that your data meets the following requirements: <ul style="list-style-type: none"><li>- Each employee must have a <b>UNIQUE EMPLOYEE ID</b> with no spaces in the ID;</li><li>- Facility values in the Excel file must match existing values in IndustrySafe;</li><li>- Marital Status values in the Excel file must match existing values in IndustrySafe;</li><li>- Worker Type values in the Excel file must match existing values in IndustrySafe;</li><li>- Department values in the Excel file must match existing values in IndustrySafe;</li></ul> <a href="#">Download Sample Format for Excel Document</a>
6.	Now choose the Excel file you wish to import into IndustrySafe. Note: it may take a few minutes to upload your file, depending on the file size and your connection speed.

Browse...

➡ Continue

### Manually Add an Employee Record

To manually add a new employee record, click on the **System Functions** icon in the top navigation menu. Under Employees, select the **Add Employee** option.



## Step 4: Set Up Users

A IndustrySafe user account is automatically created for the person who signed up for IndustrySafe. That person will receive a welcome email with their user name and password. To add additional users, click on the **System Functions** icon in the top navigation menu. Under Users, select the **Add User** option.



Complete the Basic Information section. If you have imported your employee data, enter the Employee ID or search for the employee name. Enter the persons email address for their user name. If you do not enter a password, a random temporary password will be assigned to the user.

A screenshot of the 'Basic Information' form. The form has a title bar with 'Basic Information' and a 'Top' link. The form contains several input fields: 'Employee ID', 'Employee Name' (with a placeholder 'Start typing name here'), 'User Name \*', 'First Name \*', 'Last Name \*', 'Password', 'Confirm Password', and 'E-Mail Address'. The asterisks indicate required fields.



Complete the User Properties section. Select a user level for the user and the appropriate hierarchy access restrictions.

**User Properties**

User Level \*

Business Group

Region

Division

Facility

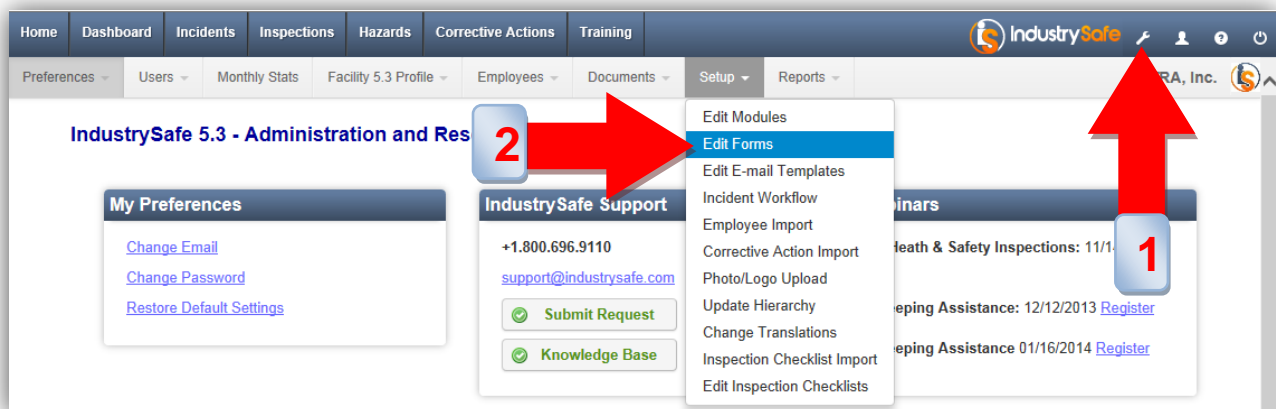
Status

User Language 5.3 \*

Once you have completed the form, click the Save button. A welcome email will be sent to the user with their user name and password. The first time the user logs into IndustrySafe, they will be asked to change their password.

## Step 5: Configure Recording Forms and Drop Down Fields

To configure a recording form or change the list of values in a drop down field, click on the **System Functions** icon in the top navigation menu. Under Setup, select the **Edit Forms** option.



To review and modify configuration settings, choose the recording form and section you wish to modify. This will give you an overview of the settings for each form and allow you to configure them.

**Edit Forms**

Save Add A Field View Form Reset Form

Recording Form\* New Incident Form

Section\* Basic Information

Using this page, you may change field labels (1), change drop down values (2), make fields required or optional (3), and enable or disable fields (4).

**Edit Forms**

Save Add A Field View Form Reset Form

Recording Form\* New Incident Form

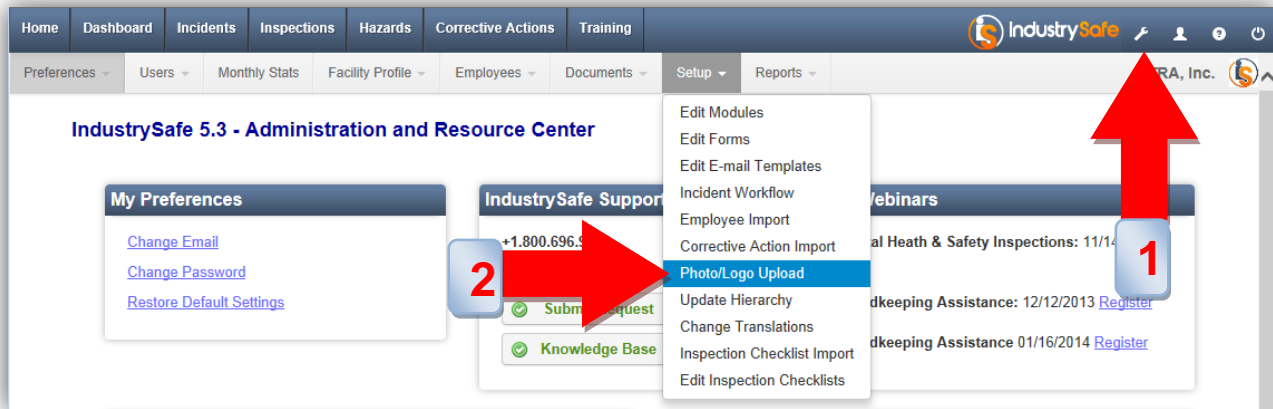
Section\* Basic Information

Field Label	Field Type	Required	Status	Public Form	Advanced Settings
Internal Report Number	Text	Yes	Disabled	Disabled	
Involved Employee Name	Drop Down	No	Available	Available	
Involved Employee ID	Text	Yes	Available	Available	
Involved Employee Title	Text	No	Available	Available	
Worker Type	Drop Down	No	Disabled	Available	
Date of Incident	Date	Yes	Available	Available	
Time of Incident	Time	Yes	Available	Available	
Incident Type	Drop Down	Yes	Available	Available	
Business Group	Drop Down	Yes	Available	Available	
Region	Drop Down	Yes	Available	Available	
Division	Drop Down	Yes	Available	Available	
Facility	Drop Down	Yes	Available	Available	
Facility Type 5.3	Text	No	Available	Disabled	
Facility Category 5.3	Text	No	Available	Disabled	
Section	Drop Down	Yes	Disabled	Disabled	
Location	Drop Down	Yes	Disabled	Disabled	
Department	Drop Down	Yes	Available	Available	

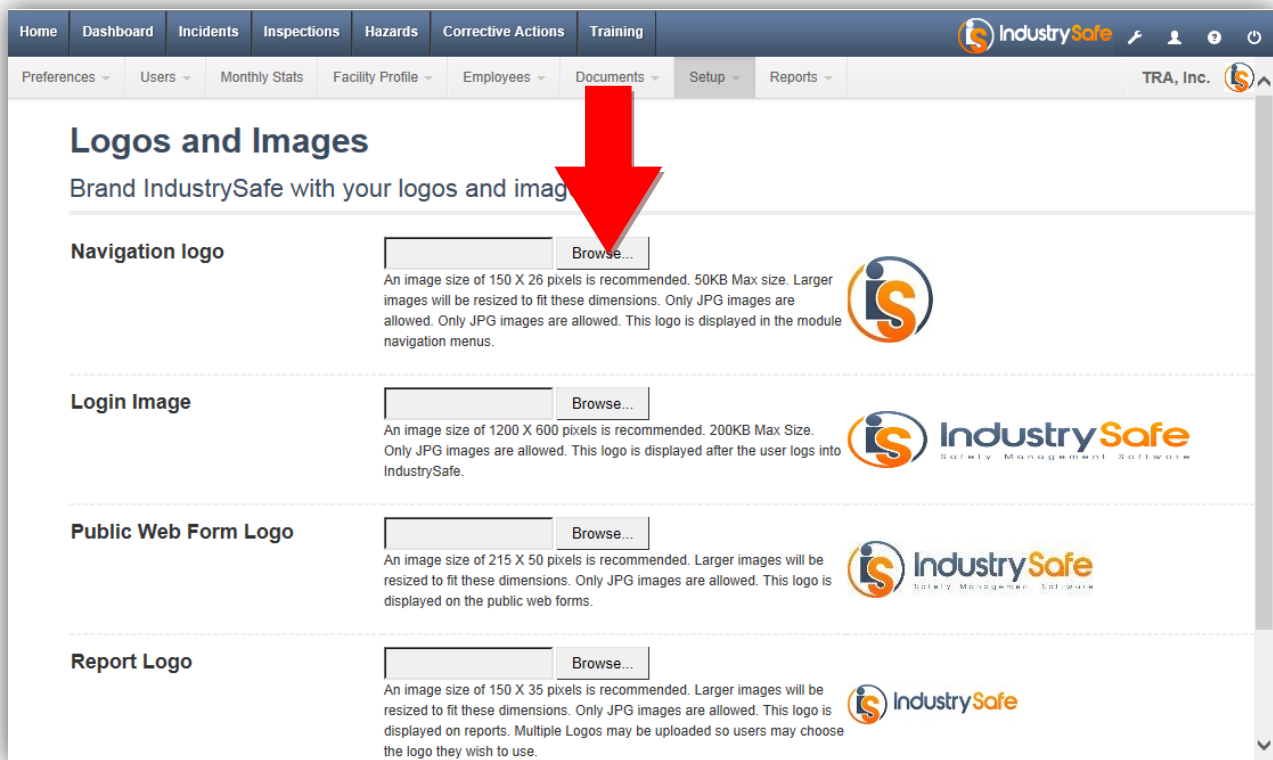
[Advanced Settings](#)

## Step 6: Brand Your IndustrySafe Site

To upload a logo for the IndustrySafe Navigation Bar, Login Image, Public Web Forms, or Reports, click on the **System Functions** icon in the top navigation menu. Under Setup, select the **Photo/Logo Upload** option.

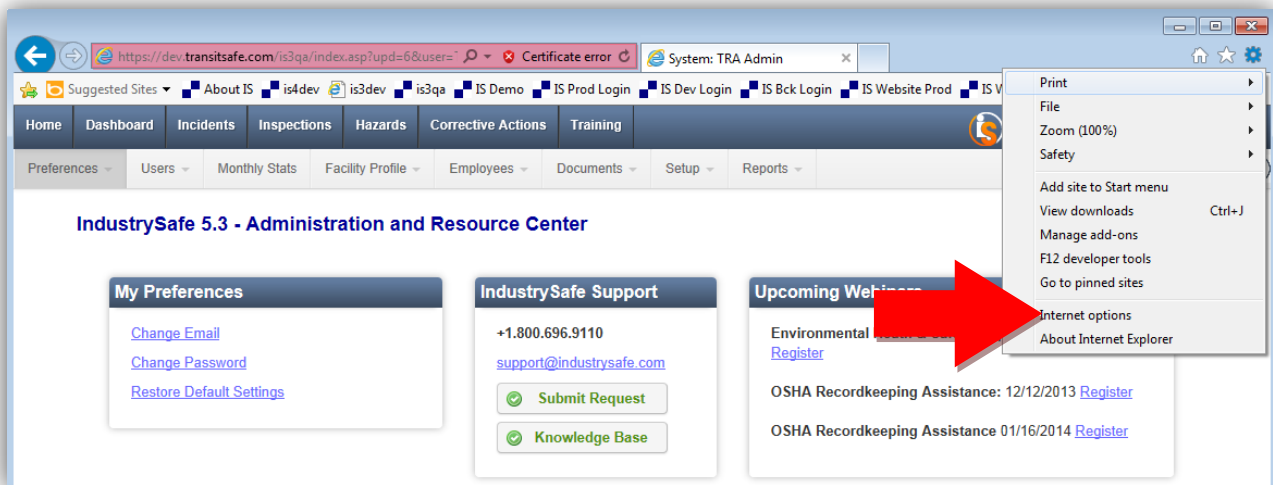


This will open the Logos and Images upload page. For each option click the browse button and select the logo or image you wish to use.

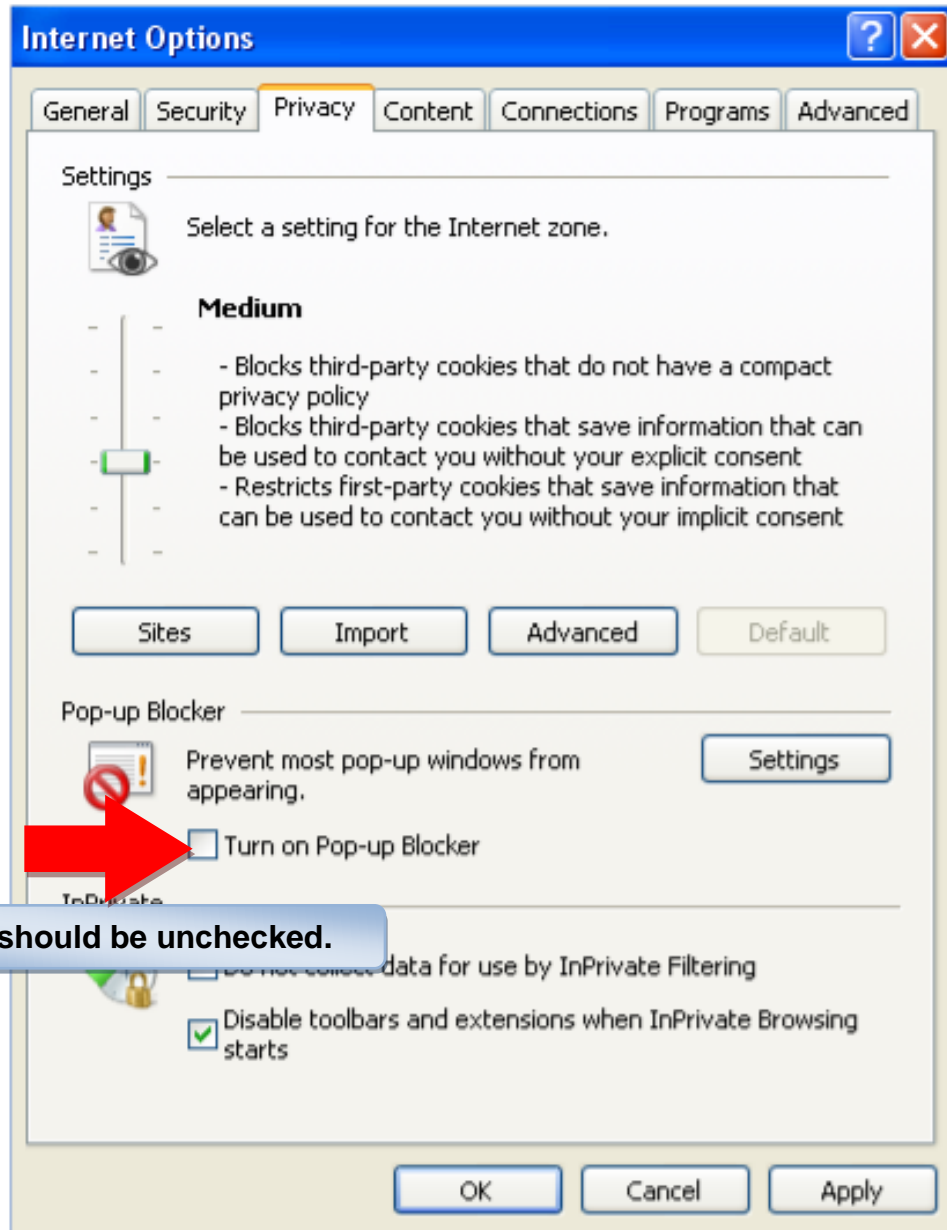


## Step 7: Check Browser Settings

The final step is verifying your Internet Explorer settings. To use IndustrySafe you must allow pop-up windows. Most computer configurations allow you to adjust your pop-up settings. You can configure your pop-up settings to only allow pop-ups from the IndustrySafe website. See your system administrator if you are having difficulty adjusting your settings.



In Internet Explorer, go to the Privacy panel of the Internet Options tab. You should either UNCHECK the "Turn on Pop-up Blocker" check box or click the Settings button in the Pop-up Blocker section and add www.industrysafe.com to the list of Allowed Sites.



This box should be unchecked.