IndustrySafe Safety Management Software Quick Start Set-Up Guide



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 <u>http://www.industrysafe.com</u> 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.

Safety Management Software	Search Q Support			
ndustrySafe Login	IndustrySafe Support	Latest Updates		
Please log in to use the system.	+1.800.696.9110 support@industrysafe.com	Tweets Follow @industrysafe		
.Password:	Submit Request	Industry Safe 6h @industry safe		
Constant Co	C Knowledge Base	Happy Friday! Be sure to sign up for our Conducting EHS Inspections Webinar Thursday Nov. 14 @ 11am EST. Have a safe and relaxing weekend!		

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.

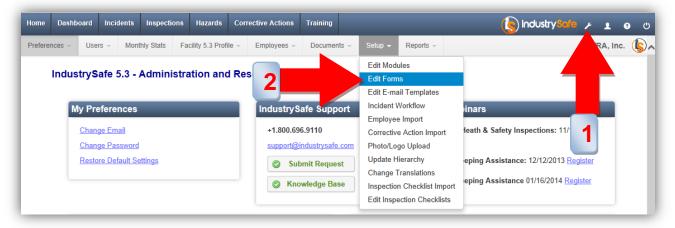
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Step 2: Set Up Your Hierarchy

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 <u>System Functions</u> icon in the top navigation menu. Under Setup, select the <u>Edit Forms</u> option.



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

Home	Dashboard	Incidents	Inspections	Hazards	Corrective Ac	ctions	Training		
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On this page, you may enable any of the layers you wish to use and change the field labels to match your organization.

Recording Form*	Company Profile	Company Profile 🗸						
Section*	Basic Informatio	Basic Information 🗸						
Field Label	Field Typ	pe Required	Status					
Business Group	Drop Do	wn Yes	Available 👻					
Region		<u>vn</u> Yes	Available 🗸					
Division		wn Yes	Available 🚽					
Facility	Text	Yes	Available					

Enter Locations/Facilities

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

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		RA, Inc. 🕼 🔨
Add New Facility Summary	rce Center	
My Preferences	IndustrySafe Support	ing Webinars
Change Email Change Password Restore Default Settings	support@industrysafe.com Regist Submit Request OSHA	nmental Heath & Safety Inspections: 11/1 er Recordkeeping Assistance: 12/12/2013 Register Recordkeeping Assistance 01/16/2014 Register

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	Θ	🔘 Тор
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 <u>System</u> <u>Functions</u> icon in the top navigation menu. Under Setup, select the <u>Employee Import</u> option.

Home Dashboard Incidents Inspections Hazards Co	orrective Actions	Training			🤄 IndustrySale နှ ք စ ဖ
Preferences - Users - Monthly Stats Facility Profile -	Employees -	Documents 👻		Reports -	RA, Inc. 🚯 🖈
IndustrySafe 5.3 - Administration and R	esource Cer	nter	Edit Modu Edit Form Edit E-ma		
My Preferences	June to a	nor	Incident V Employee		/ebinars
<u>Change Email</u> <u>Change Password</u> <u>Restore Default Settings</u>	Sul	bingostrysafe.co bmit Request bwledge Base	Corrective Photo/Log Update H Change T Inspection	e Action Import go Upload	dkeeping Assistance: 12/12/2013 Register

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

	ployee Data Import Wizard p 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.						
Follo	ow 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: - Each employee must have a UNIQUE EMPLOYEE ID with no spaces in the ID; - Facility values in the Excel file must match existing values in IndustrySafe; - Marital Status values in the Excel file must match existing values in IndustrySafe; - Worker Type values in the Excel file must match existing values in IndustrySafe; - Department values in the Excel file must match existing values in IndustrySafe;						
	Download Sample Format for Excel Document						
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 <u>System Functions</u> icon in the top navigation menu. Under Employees, select the <u>Add Employee</u> option.

Home Dashboard Incidents Inspections Hazards Co	orrective Actions Training	💽 IndustrySofe န 🛓 e ပ
Preferences - Users - Monthly Stats Facil Profile - IndustrySafe 5.3	Employees Documents Setup Re Add Employee Employee Summary	eports → PA, Inc. (§) ∧
My Preferences	IndustrySafe Support	Upcoming Webinars
Change Email Change Password Restore Default Settings	+1.800.696.9110 support@industrysafe.com Submit Request Knowledge Base	Environmental Heath & Safety Inspections: 11/14/ Register OSHA Recordkeeping Assistance: 12/12/2013 Register OSHA Recordkeeping Assistance 01/16/2014 Register

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 <u>System Functions</u> icon in the top navigation menu. Under Users, select the <u>Add User</u> option.

Home Dashbo	ard Incidents	Inspections	Hazards	Corrective Actions	Training					4	1	8	୦
Preferences -	Users - Mon	thly Stats Fa	acility Profile –	Employees -	Documents -	Setup –	Reports -				TRA,	Inc.	(\$
Indus	Add/Edit Levels Add User User summary Broadcast Emai			e 2e Ce Industry	enter Safe Suppo	rt	Upcomir	ng Webinars					
	Change Email Change Password Restore Default Se			support(696.9110 @industrysafe.c ubmit Request nowledge Base		<u>Register</u> OSHA R	r Recordkeeping	Safety Inspections: 11/ Assistance: 12/12/2013 E Assistance 01/16/2014 R	egiste			

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.

Basic Information	Θ	🔘 Тор
Employee ID		
Employee Name	Start typing name here	
User Name *		
First Name *		
Last Name *		
Password		
Confirm Password		
E-Mail Address		

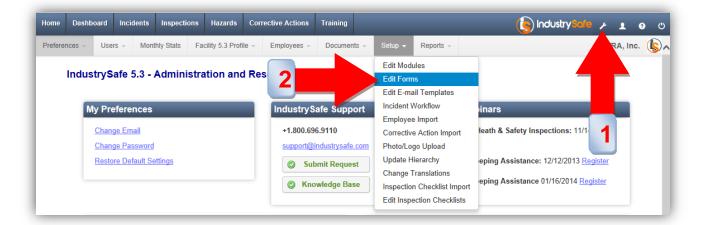
Complete the User Properties section. Select a user level for the user and the appropriate hierarchy access restrictions.

User Properties	😔 🔘 Тор
User Level *	
Business Group	All
Region	
Division	
Facility	
Status	Active 🔽
User Language 5.3 *	English 🗸

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 <u>System Functions</u> icon in the top navigation menu. Under Setup, select the <u>Edit</u> <u>Forms</u> 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 O Add A Field	View Form 💈 Reset Form	
Recording Form*	New Incident Form	
Section*	Basic Information V	

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 I A Field View Form Seset Form							
Recording For	New	Incident F	orm	~			
Section*	Basi	c Informati	on 🗸				
Field Label	Field Type	Required	l Status	Public Form	Advanced Settings		
Internal Report Number	Text		Disabled 🗸	Disabled 🗸			
Involved Employee Name	Drop Down	N 3	Available	Available			
Involved Employee ID	Text	Y	Available	Available			
Involved Employee Title	Text	N	Available	Available			
Worker Type	Drop Down		Disabled 🗸	Available			
Date of Incident	Date	Ye	Available	Available			
Time of Incident	Time	Yes 🗸	Available	Available 🗸			
Incident Type		Yes	Availa	Available			
Business Group	Dre 2 wn	Yes	Availa 4	Available			
Region	Dro	Yes	Availa	Available			
Division	Dro wn	Yes	Availa	Available			
Facility	Dro wn	Yes	Availa	Available			
Facility Type 5.3	Te	No	Avail	Disabled			
Facility Category 5.3	Tex	No	Availab	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 <u>System Functions</u> icon in the top navigation menu. Under Setup, select the <u>Photo/Logo Upload</u> option.

Home Dashboard Incidents Inspections Hazards	Corrective Actions Training		ن 🗨 🛓 Industry Sale 🖉
Preferences - Users - Monthly Stats Facility Profile	✓ Employees ✓ Documents ✓	Setup - Reports -	RA, Inc. 🚯 🖍
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My Preferences	IndustrySafe Suppor	Incident Workflow Employee Import	/ebinars
Change Email Change Password	+1.800.696.9	Corrective Action Import Photo/Logo Upload	al Heath & Safety Inspections: 11/14
Restore Default Settings	Submy squest	Update Hierarchy Change Translations Inspection Checklist Import Edit Inspection Checklists	dkeeping Assistance: 12/12/2013 <u>Register</u> dkeeping Assistance 01/16/2014 <u>Register</u>

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.

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	Logos	s and	Image	es							
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imai allov					Browse 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.						
1	Login Ima	ıge			e size of 1200 X 600 G images are allowed Gafe.						
1	Public We	b Form	Logo	resized t	e size of 215 X 50 pix o fit these dimensions d on the public web fo	. Only JPG ima	-	-	(s) Industry Safe		
	Report Lo	ogo		resized t displaye	e size of 150 X 35 pix o fit these dimensions d on reports. Multiple they wish to use.	. Only JPG ima	ges are allowed.	This logo is			

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.

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Image: Suggested Sites Image: Sugges	Corrective Actions Training	(Print File Zoom (100%) Safety Add site to Start menu	
IndustrySafe 5.3 - Administration and	Upcoming Wel ⁻ⁱⁿ	View downloads Ctrl+J Manage add-ons F12 developer tools Go to pinned sites		
Change Email Change Password Restore Default Settings	+1.800.696.9110 support@industrysafe.com Submit Request Knowledge Base	800.696.9110 Environmental Register port@industrysafe.com OSHA Recordkeeping Assistance: 12/12 OSUMD Request OSHA Recordkeeping Assistance: 12/12		

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.

