Main Features

Background Information

SafetyBase is designed as a means to provide a fully *auditable* health and safety management system to international standards

There are three versions of SafetyBase to suit all types of employer and level of compliance. If you are in doubt about your version, this is displayed in the top right of your screen

The system is flexible. It can serve as the sole vehicle for all required health and safety activities or be used as an adjunct to existing safety systems

Using SafetyBase

Getting around inside SafetyBase is very similar to most web sites

Navigation is by the following means:

Left sided navigation bar
"Breadcrumb" view below the Admin tabs, showing parent/child links for the page you are on
Normal browser "back" and "forward" function
Ability to link related files within the application
Blue highlighted links within pages for quick access to relevant files

Home Page

On your Home Page, you will find tabs for your Dashboard, Tasks and Watchlist

On the Dashboard, you will find lists of current safety related indicators such as loss statistics, lists of unresolved issues and other information on the "health" of your safety system. The Dashboard is, as the name suggests, a place to monitor a whole range of key indicators or create customised reports and add them to the Dashboard

The Tasks tab shows all tasks assigned to you and by you, so you can monitor progress both of your own responsibilities and people to whom you have allocated tasks. The red disc near the top of the screen indicates the number of Tasks you have pending

The Watchlist tab shows files you have tagged for your own personal monitoring. Any change in the status of those files will generate an e-mail for you

Reports Page

There are some Standard Report tools on this page and a powerful Custom Report generator

The Standard Reports include a Calendar Task summary, a Tabulated Task summary and a month by month report for loss statistics. The Tasks reports both have filters so you can make very detailed enquiries

The Custom Reports section lets you select any file type in the database and obtain highly filtered reports to very exact specifications. Once created, you can make the report private or public and save it onto the Dashboard. SafetyBase reports are dynamic, so they update automatically when new data is created. Just refresh the page

Tabulated reports can be exported as CSV files. Most people are able to create reports and graphs in spread sheets. You can turn the information into trended reports using the SafetyBase Grouped CSV function and wizards, such as Excel's Pivot Tables

SafetyBase creates simple charts too. You can create these by selecting "Chart" in the "Report Type" droplist in Step 1 of Custom Reports. Available charts are pie, line, bar. You can filter down to any report you want. Be aware that some selections will return unusable charts, so you might need a little practice

People

This list is where you add and edit the details for all your employees, managers and users, including external people (where appropriate). It's in the top row of tabs and it provides editable details on their e-mail address, type of person, their location, time zone, whether they are a user or administrator and their user expiry date.

Only Administrators can attach documents to People. ("Attach Documents" button). These documents may be highly confidential, so only Administrators, the user themselves, or users with "Edit" or "Delete" Permissions for People may view them. Administrators can also edit or delete

Users can only edit their key details, including password, under their name (top right of the screen). Note that the password is encrypted and does not display for security purposes. Clicking any person's name in the People tab reveals details about a person, depending on the user's levels of permission. A user, can, however, view all their own details by clicking their own name. Only Administrators can add or edit personal details, including contact details, medical information and attachments. Administrators can also make bulk uploads of People using a CSV file

Permissions can be set for access to Files, People and Responsibilities. Levels of Permission are None, View, Add, Edit and Delete. Abilities for users to view higher level or personal/confidential information can be very specifically controlled.

To find people more quickly in a long list, you can click some column headings to sort, or you can narrow the search by filters at the top of the page

The account has a time zone default pre-set for your headquarters or key locations. If people are located in other time zones, the Administrator may select a particular time zone in their People page details. This will adjust times and dates for them, so that deadlines and event dates are aligned

When People terminate employment, they can be archived. To do this, enter a date in their "Termination date" and submit the form. This takes you to the Archive People page where you can re-assign their duties, tasks and similar associations. Or you can click the person's Archive icon in the People Tab

Groups

This is also in the top row of tabs. If your account includes the **"Assessments"** module, under the **"Training"** section, you can create Groups (such as "Contractors" and allocate people to the groups. This is useful when you want to send an Assessment to a particular group. For full details about Assessments, go to Help/Health & Safety Procedures Manual/Training/Assessments

If you do not have the Assessments module, then allocating people to a Group is not essential

Permissions

This list can be edited through the top row of tabs but *only to those with EDIT or higher permission for People*. The page lists all users and gives options for restricting their ability from **None** (no access), to **View, Add, Edit** or **Delete** in that ascending order. Administrators can set default permissions in the top section of this page. Levels can be amended individually at a later time.

The restrictions are applied to three separate types of data input: Files (safety data, left navigation bar), the People tab and the Responsibilities tab.*As a guideline, only the Administrator should edit People and Responsibilities,* so most others should only be given "View" permissions for these tabs

Note that Administrator's names do not show in the Permissions list, because they automatically have top level permissions

In addition, the Administrator and anyone with "Edit" or "Delete" Permission for People has the ability to override any Permissions to Files considered confidential or restricted. Just click on a person's name, then the "Override Permissions" button. Overrides can be set per file type

Responsibilities

This list is available through the top row of tabs.The page permits the Administrator to create a hierarchy of locations. By clicking on each location, roles can be allocated to people who have been created in the People section. People can inhabit more than one role and/or location

This function is an important feature of the system, because it allows SafetyBase to recognise who you are, allocate files to locations, allocate Tasks to the right people, do filtering and generate reports according to location

Mobile Settings

Mobile reporters can quickly log a report using text or email authentication. Mostly, a mobile reporter will get a cut-down version of the form when they log in

This is to make it easier to send a quick, concise report

The Mobile Settings tab allows you to select:

Which of the available forms can be activated in your account
What the default file status will be. (Reporters on mobile devices do not choose the status)
Which role in your organisation gets notified when a mobile report comes in
Which of your locations is the default in case the mobile reporter cannot complete it
Who is the default reporter (name), when the person has logged in using text/email authentication

For detailed instructions, go to Help/Getting Started/Setting up SafetyBase (Administrator)

Help

The Help pages include **SafetyBase Overview, Getting Started** instructions and a **Health and Safety Procedures Manual**

The Health and Safety Procedures Manual is in sections corresponding to the File Types. It is linked in a tab in all File pages to give guidance and context while entering data or managing the file

Links

These are health and safety related links that may be helpful in providing extra knowledge and resources

Files (data entry files in the left bar)

To start a file, you will need to select the type of file from the navigation bar, click the "Add" button, then some basic identifiers for the file, including a status. Click CREATE and the data entry page will appear

If you need interpretation of the data entry questions, or further guidance, hover your cursor over the questions and you will see a "helper" display. These often include definitions of words and phrases

While editing data, you will notice a black bar at the bottom of the screen. This useful little tool allows you to spontaneously build management activities around the file, like sending Tasks, attaching Documents and related information, linking with other Files, associating People and adding Days Lost & Costs (Accidents only)

As you complete the data entry, some drop lists will generate recommended Tasks. The recommended Tasks will not appear until after you have clicked the Create button at the bottom of the screen.

After submitting the form, the page will display a summary of data you have entered and show a row of tabs. These tabbed functions include those listed above for the inline toolbar, plus a file status log.

Automatic Tasks

You will sometimes see caution notes about automatic Tasks in a file while editing it. Some drop list selections will create an automatic Task. If SafetyBase takes you straight to the Tasks tab, after creating the new file, it's telling you that Tasks have been automatically created. These tasks are usually optional, however, where there is an imperative or compliance issue, you will not be able to delete them. *An example might be where a serious accident must be reported to your safety authority*

You can click the "Quick Close" green disc icon next to the Task outline. This adds today's date, which closes the Task. You can edit the Tasks to add your own specific instructions, change the allocated person, enter reminder dates and make file notes. Then send it using the "Save" button in the Task itself.

If you create a file note in the Task, it will automatically record the date and store the file note in a table for viewing next time you click on the Task. If you add further file notes, these will be recorded in a string. For a quick look at the latest file note, you can find it as part of the Task description in the Task tab

You can change who the automatic Task is assigned to or accept the default person. If appropriate, you can cc the Task to another person

When the Task has been created and sent with a proposed completion date, it will e-mail to the recipient(s) and appear on their Task List. Depending on their permissions, (Edit or above), they may be able to edit the entire Task, including re-allocating it to someone else, or they may only be able to add a Completed Date. A Task can only be removed from their list by adding a Completed Date or deleting it, if they have the right Permission

Manually created tasks

You can add your own tasks at any time, either while editing a file, (use the black toolbar at the bottom right of your screen), or by clicking the "New Task" button in the Tasks tab

Recurring Tasks

This function is provided so that recurring tasks such as inspections, evacuation drills and reviews can be programmed, much as **Outlook** or similar calendar systems. To do this, you create a Task and click the Recurring option. This modifies the fields to allow the setting of frequency for the Task and days notice required, as well as the role responsible. Names are not used for assigning of Recurring Tasks, because over time, people change roles

The system will place the task on the Task List of the person who has that role and e-mail them when the required task is due. The e-mail will link back to the Task so it can be signed off

Attach Documents

This section is provided to give dimension and flexibility to the safety system by allowing you to link SafetyBase files with existing documents on your device. For example, you may have a certificate and wish to attach this to a Training Record. Having done an accident investigation, you may wish to associate a photograph of the scene and/or correspondence with the statutory authority. A hazard in the Hazard Register can have a Code of Practice or Standard associated with it. You can even attach a short video or sound file

To attach documents, simply name the document, browse to it and click ADD. This will download the document to the SafetyBase server and make it available for viewing via a link

Link Files

This function is provided to assist with instant navigation where more than one file has relevance to an issue. For example, an Accident Report can be linked with the investigation

Instead of searching for the related information, you can simply link the files together by selecting them from the filtered drop lists and clicking ADD. The more you filter the information, the more the system narrows down your search. Once the file(s) are related, you will be able to click back and forth between them. In the linked file(s), the file of origin will also be mirrored by a backlink, giving you a **horizontal navigation** between all the related files

Associate People

This is your opportunity to associate the file with relevant people, so that a history for every person can be created against their name

If it is appropriate to associate a person, click the drop list at the top and allocate a role (example, for an Accident Report, you could add the name of the injured party, initial treatment provider and reporter). Select from the list under "Person" and submit your page. You can now get reports on every person's safety history by clicking on their name. (See the section on People, above)

See a Status Log

The Status Log shows a running history of when a file's status changed, what the status changed to/from and who changed it. The page also logs escalations

Days Lost and Costs

This is only found in Accidents Reports. It is provided to capture lost days and costs due to work accidents. Add days lost and costs in appropriate months. (This can also be updated via the Reports Page)

Escalations

An Administrator can set Escalations for any file type, depending on the file status. For example, if a file stays open for too long (e.g. an Investigation or Work Permit remains open for too long, one or two people can be notified). You can create escalations for each status, so more urgent status definitions can be escalated sooner.The Escalations button can be found at top right of an Administrator's file summary page. The escalation status, time delays, message content and recipients can be set. For file details to be included in the e-mail, contact SafetyPro for advice at 0800 000 267 (in New Zealand), +64 9 535 4355 or e-mail info@safetypro.co.nz

Upload CSV

An Administrator has an Upload CSV button on file summary pages and the People tab. This enables instant uploads of bulk data you may already have into SafetyBase files. For this to be successful, the data has to be clean and matched with the data fields it will inhabit, or it gets rejected

Download PDFs

You will see download PDF buttons in Files, File summary lists, Information pages, the People tab and People details

Watchlist

The Watchlist button can be found at the top of all individual file pages. Clicking it will place the file on your Watchlist and enable notifications when the file status changes

Unique identifiers

Whenever you create a new file, SafetyBase allocates an automatic identifier to it, which is a combination of a prefix and consecutive 5 digit number. This will assist you to differentiate between similar files

Filter Buttons

These are provided on the People tab, file summary pages (e.g. Accident reports) and Task Reports so that you can drill down to reveal elements having a particular status or location (or simply to allow you to focus on issues and events relevant to your site)

Archive and Delete Files

You can delete files one at a time (if you have the appropriate Permission) by using the red cross icons at right of the file summaries. If you need to bulk delete, you can select the files using left side check boxes, then select Delete from the drop list at the bottom of the page

Archiving files is a safer option and this allows files to still be "visible" to the Report Generator. Select files using left side check boxes and selecting Archive from the droplist. Archiving files can be temporarily reversed by using the "Include archived files" link. You can "unarchive" a file by editing it and unchecking the Archive check box

For file summary pages (e.g. Accident Reports), to keep the current files under control, and keep page-load speeds optimised, Administrators can set Auto Archiving. The Auto Archive button for Administrators is to the right of all file summary pages

Copy File button (between the edit and delete icons)

Some files, such as Hazards, Work Permits and Contracts are likely to be re-issued many times with little change, except the date, location or person issued to. To save duplication of data entry, it is possible to "Copy" and then edit the new file's details

Search

This is a handy tool to quickly find a file if some detail or wording is known. Use file numbers, names, significant words or fragments (more than 2 letters) to locate a list of possible hits

Audit Trail

SafetyBase automatically records the last person who edited a data field, along with date and time. To "discover" this history, just roll your cursor over any chosen data field (only when in non-edit mode)