User FAQs

Dashboard Tab

What is the Dashboard?

The Dashboard is the first tab on your Home Page. It's a bit like your car dashboard, in that it shows a number of key performance and monitoring indicators. Some information is standard, but you can add your own customised reports and have them tabbed into your Dashboard. (See the "Reports" section below)

Tell me about the Accident Statistics window

This is a chart and table giving you a snapshot of days lost and costs associated with accidents. It includes a 3 month moving average for Days Lost. The source files for the data are Accident Reports. To update the data, you can either visit each individual Accident Report and update the "Days Lost & Costs" tab, or click on the "Update data" link next to the chart. Only open Accident Reports are displayed on this table. Be sure to select the correct year and month and click "Filter" before editing the selected Accident Report(s) and updating

What about the Lost Days Enquiry?

This is a quick enquiry tool to determine the number of lost days due to accidents for a chosen period. The source data is manually entered in Accident Report files (see above)

What are Open Files, as listed on the Dashboard?

These are files that have been left with a status equivalent to open. These are displayed so that users can monitor unresolved or stalled issues. To remove these from the list, their status must be edited and changed to a status that means closed. (Status names for "Open" may vary depending on the file, but it's always very clear which ones mean "Closed"). Some users may not be able to edit status of other author's files if their Permission is View or below, but they can always edit a file they created themselves

How do Watched files work?

Any file can be marked to watch using the Watch button at the top of the individual file summary. This displays the file on the user's Watchlist. If the status of the watched file changes, the watcher will be notified by e-mail. Files can be removed from Watchlists by clicking "Remove from Watchlist" at the right of each file on the Watchlist tab

What are "Overdue" and "Due Soon" Tasks?

Overdue tasks are those for which the allocated Due Date has passed. Due Soon Tasks are those with allocated Due Dates within the next month

Tasks Tab

Tell me about Tasks

Tasks are created while working with files (left navigation bar). Some Tasks are created automatically because users have made selections from drop-lists. (For example, while completing an Accident Report, if you select "Yes" when asked if the injury was notifiable, the system will create a Task to report to the authorities as the file is updated. For more detail about creating Tasks, see below: "Files (entering and managing data)"**

How can I remove Tasks from the lists?

The Task must be edited and a Completed Date added. This removes it from filtered lists but keeps a record on the parent file

My Tasks show the same task in "Assigned to me" and "Assigned by me". Why is this?

This would indicate you assigned the Task to yourself, which is perfectly fine. Adding a Completed Date will take it off both lists

What is the yellow asterisk icon in my Task list for?

This allows you to highlight a Task when you are working your way through the list. In long lists, this is useful when closing (removing) completed Tasks. When the highlighted Task is removed, the highlight will move to the next Task below, which keeps your reference point

Please explain the other Task icons

The pencil is the edit icon, the cross is delete and the green disc with a tick closes and completes the Task with today's date. If icons show grey, this normally means you don't have permission to perform the action. Roll over the icon to see confirmation. You may need to check your Permissions with your Administrator

I want to edit the detail of a Task allocated to me but I can't. How can I do this?

This is due to your Permission settings. People with EDIT (or higher) permission for Files can edit Tasks. ADD and below cannot edit Tasks, except for adding a Completed Date. You can, however, edit tasks created by yourself. If the Permission appears incorrect, ask your Administrator to change it

Watchlist Tab

What is the Watchlist?

See explanation under Dashboard section above

Reports Page

What are Standard Reports?

Currently, the following Standard Reports are provided:

Calendar display of all Tasks

List display of all your organisation's Tasks

Days Lost & Costs by month

How do I create a Customised Report?

In Reports, click the "Add Custom Report" button and follow these simple steps:

Step 1. Choose the report type. "List of" will create a tabulated list type of report. "The number of" will give you a simple total number of files that fit your selections. "A grouped CSV of" will give you a spreadsheet that groups by date range and totals according to parameters you choose. (For example, back injuries grouped by months in which the accident occurred). "A chart of" will create pie, line and bar charts, including "grouped-by" date range where apprpriate. Now choose type of file to report and Location. (Selecting a Location reports on that Location and all its children)
Step 2. Use this step to filter information out. (For example, when creating a report on accidents, you could choose lower back injuries only, to males only, during the night shift only, during a particular date range). By default, all information and dates are selected
Step 3. Use this step to select the comparison you want to report. In "List of", you can select the column headings you want to display in your table. In "Grouped CSV", you can select the data type you want to be counted and grouped and select the date field for grouping by. For "A chart of", you can select the chart type, then what count is to be used to graph the results (number of files, days lost or costs). Choose from available time fields in the file type to group the results by, then choose

the data field to group the report by. Please note that when creating a pie chart, you are not offered a time grouping
Step 4. SafetyBase gives your report a generic name. Edit it to give the report a name that accurately describes what it shows. Tick the "Allow other users to view this report?" box if you want other usesr to have the report on their Reports Page. Click Save. For Grouped CSV reports, you need to click the "Download CSV" button to view the spread sheet

Can we have reports in the Reports page that stay current without re-running them?

Yes. Adding new files that fit your report's parameters will automatically update your report. So leaving a date range open, for example, is a good way to ensure your report has longevity

Can we place our customised reports on the Dashboard?

Yes. When you have defined and saved a report, they appear on the Reports Page as a list. You can edit the report and click "Display on Dashboard". The report will appear as a tab in the Dashboard

Files (entering and managing data)

What are Files?

Files are found in drop-lists in the left navigation bar. If you need to enter data, select an appropriate file type (e.g. under the Accidents header, you will find a file type called Accident Reports). Click on the file type to start. The upper left tab will display the file type you are using. There will be a summary of any existing files. You can reverse sort the list by clicking some column headings. You can also use the Location and Status filter to narrow down the view

Can I change the key fields?

Yes, if you have a customisable account

How do I start a new file?

Click the Add (file name) button (e.g. Add Training Record). You first need to complete some file identifiers and click "Create". This will display the file data entry fields

Which fields are compulsory?

The ones marked with an asterisk

I'm not sure what some questions really mean. How do I know?

Hover your cursor over the question. This will display a helper. Some contextual definitions are kept there too, so it's worth checking

I need interpretation sometimes when completing a form. What's the context? Is there a procedure I can refer to?

Yes. When completing a file or editing it, the relevant procedure displays in a tab to the right. (For example, the required procedure for accident reporting)

Can we change those procedures to make them specific to our organisation?

Yes, if you have a customisable account

How are Tasks created?

There are several ways:

You can use the inline toolbar while entering or editing data. This is a spontaneous way of creating Tasks when they occur to you. Saves scribbling them on a piece of paper for later!
You can wait till after you have updated the file. Look for the Tasks tab in the dark grey bar
Some Tasks are created automatically

For more detail, see Information/SafetyBase Overview/Main Features

Can I create Tasks manually?

Yes. Click the "New Task" button, either from the inline toolbar, while editing a file, or in the Tasks tab when viewing the updated file. You can complete the fields and create Tasks, adding any notes or advice as appropriate. You can make Recurring Tasks by checking the in-line selection button. See the SafetyBase Overview/Main Features section of these help pages

Can we change data entry fields and the Tasks they generate?

Only if you have a customisable account

What if I have an ongoing issue with a file or Task and I need to add running file notes?

You can make sequential file notes in the both Tasks and also their parent files while editing them. Just look for the box near the bottom. Every time you update, the note will be automatically dated and stored. Add further file notes whenever you wish. The last note will display in the File or Task summary. To see a list of all file notes, click on the File or Task to view a summary

Can I attach relevant documents to files?

Yes. You can use the inline toolbar. Or, you can do it after updating the file. The tab next to Tasks is called Attach Documents. You can attach anything stored in your network, including pdf's, images, spreadsheets, presentations and videos

What is the tab "Link Files"?

Sometimes, files are related in some way. For example, an Accident Report is related to an Accident Investigation. If you want to be able to quickly click to a related file instead of navigating to it, use this feature. You can link more than one file

What's available to auditors so they can see who, when, what time entries were made?

The Status Log tab is next to the Link Files tab. This summarises the status history of the file. You can also hover over any completed field in a file (not in EDIT) and view who made the last edit and at what date and time

I have too many files showing on a file list page. (For example, a large number of Accident Reports). What can I do?

Two ways:

Leave your Location filter at a narrow setting

Archive older files by clicking the archive icon on the right of the file list. Or, in the left column, you can select the files you want to archive, then select Archive at bottom left and "Update". You can "unarchive" files later: Temporarily re-display them by ticking the "Include archived files". Edit the file and uncheck the "Archived" box. You can do this as often as you like. Archived files are still visible to the Report Generator

Note that your Administrator can set file types to auto-archive after a specified period. It's worth doing this for high volume files

I'm sure there were more files listed! What happened to them?

Two possibilities: 1. Your filter button is left set at another Location; 2. Files may be archived (as above)

I can't get into a particular file type. My permissions let me into other file types. What's going on?

This is probably because the file type has confidentiality requirements and the Administrator has overridden your Permission. It may apply to all users, but if you believe the settings are wrong, ask your Administrator to change them.

I want to create a file that is going to be very similar to a previous one. I can't be bothered to enter all that data again. I'm tempted to edit a previous file!

That would jeopardise the integrity of your information paths. Just look for the "Copy File" button between the Edit and Delete buttons. This will create a copy with a new unique ID in which you can now edit details like the Location. It's similar to "Save as"

Monitoring and maintenance

How do I change my password?

Click your name towards the top right of the screen where it says "Logged in as:" Passwords do not display in your account, or Administrator accounts, for security purposes. If you forget your password, just type in a new one

What about help and support?

It is recommended that users initially call the local Administrator or key users for help. If the enquiry cannot be resolved or is very urgent, help can be sought by using the contact details in the Help tab

Can files be escalated after they remain unresolved past a selected time?

Yes. The Administrator can set parameters for escalation, based on the status definition that is currently on the file. On every file summary page (e.g. Accident reports), the Administrator has an Escalation button. This sets escalations for the File Type. The Administrator will need to know: 1. The urgency of the Escalation needed for each status 2. The delay period before the first escalation is issued 3. The delay period for continuing escalations until the status is changed 4. One or two recipients who will receive the escalation e-mails

Can we upload existing spreadsheets or CSV files to populate our SafetyBase files?

Yes. Your Administrator has an "Upload CSV" button on file summary pages. CSV Uploads are only recommended if you have 20 or more files to upload. If not, you may not save any time

To use this function, you need some clean data in a CSV format. The CSV page lets you download a sample CSV with field names and lists of acceptable data entries for drop list fields. Data that differs in any way from expected drop list entries, for example, spaces, full stops left in, small spelling errors, will be rejected, so it is essential to double check the data or use copy and paste where applicable to ensure consistency. Please note that standard spread sheets will not upload unless they are "saved as" a .csv format