Setting up SafetyBase (Administrator)

The following is a step by step guide to setting up the key framework for your account

Create Locations first

Go to the **Responsibilities** tab and create your main **Locations** in the upper section of the page. The ADD mode asks you to choose a "Parent" site, which is important in setting up reporting hierarchies. *Make the top location at the highest possible level, even if you do not currently want to use it, because you cannot add a higher level later*. You can always add "child" Locations but the top Location cannot have a "parent" added

Employers with international connections should set the highest level as "Global". You can add Locations anywhere in the world

Only add child locations if there is some advantage in doing so. The "rule of thumb" is don't add a child location unless there are workers in it and some form of management responsibility for it

Some large organisations need to isolate data and activities in particular divisions from other divisions. This is an available option that uses the Location Hierarchy to create silos based on where you are in the hierarchy. It's not a client level setting and may be available on request by calling 0800 000 267 or emailing info@safetypro.co.nz

Add People next

Go to the **People** tab. Add people by entering their name, email address and an initial password

Tick "Administrator" if you want that person to be a fellow Administrator. Administrators should always be people with proven credentials and a track record of prudence and responsibility. There should be no more than is absolutely necessary

You only need an individual expiry date if the person is known to be moving on or is a temporary worker or external provider

Tick the "Account User" box if you want the person to actively access SafetyBase. They will need an email address, password and location

Choose person type. This is a label only and is not critical

Choose a default location for the person. For managers, this can be a functional location, so if their job is organisation-wide, make it a region or country

Adding people to a **Group** is only required for the **Assessments** module, if your account includes it. It's under **Training**. Use of this feature is covered under *Help/Health & Safety Procedures Manual/Training/Assessments*

Complete **Additional Details** if required. *Note that this section can only be viewed or edited by Administrators or users with Edit or Delete permissions for People*

As soon as a new user is created, they will have default Permissions of Add for Files, None for People and View for Responsibilities. These are very conservative settings to get them going. See below for adjusting the defaults and adjusting Permissions for all non-Admin users

As soon as possible after getting SafetyBase up and running, you should add all non-user workers to the **People** page. Non users will not require an e-mail address or password, but the system will ask you to enter their Base Location. *This is important, so that you can associate them with incidents and events using droplists*

For a large batch of new people, you can upload a CSV. Administrators have an "Upload CSV" button in the **People** tab. This provides a sample CSV that shows the exact headings you must use for each column. *(The columns correspond to the data entry fields)*. It also looks at your account and lists the acceptable drop list options that you must use. For example, "Yes", "No" or "NA". If your upload used the convention "N/A", rather than "NA", that would cause the CSV line (one whole file), to be rejected. Errors are reported to you, so you can fix the data. Watch for spaces, hyphens, plurals and other minor differences. Duplicates are skipped. It's best to spend some time cleaning the data prior to trying an upload. For this reason, a CSV upload is unlikely to save time for less than 30 files

Leave the time zone setting at default for each person, unless they work in a different time zone. By setting their time zone, they will see reminders, occurrences and chronological information in their local time and date. So, for that reason, you should consider amending the user's time zone if appropriate

Non Administrators will be able to maintain their own passwords *but not those of other users*

Responsibilities

Go back to **Locations** and scroll down to the lower part of the page, entitled **Responsibilities**. There is a suggested list of generic roles for persons often associated with the management of health and safety. The purpose of this is not to impose a set of new roles and titles, but to associate generic roles (example OHS Coordinator) with a person and location. *A person can have more than one role and location*. We advise allocating at least the following roles:

Senior Executive (overall responsibility)
HR Manager (overview of people policies)
OHS Coordinator (administers the safety system)
Plant and Equipment Manager (maintenance and contractors)
Property Manager (facilities and building management)
Line Managers (day to day reporting and recording)

To allocate people to a **Responsibility** and **Location**, first click the Location in the tree at the top of the page. Then click EDIT in the same row as the role you want and select the person from the drop-list. **It is important to understand that some Tasks in SafetyBase are notified by Responsibility**, so if you want the e-mail to find the right person, you have to place them correctly in the hierarchy of **Locations**. If, for example, an e-mail needs to go to a Line Manager, it will find the nearest one to the **Location** of the File in question. If no Line Manager exists at that **Location**, SafetyBase sends the e-mail to the next one up the hierarchy. If no one occupies a specific role, the OHS Coordinator receives the e-mail by default.

*If you need to appoint more than one person to the same **Responsibility** at the same **Location**, create a further location for them*. It is OK to mix geographical and functional Locations. (E.g. under Southern Region you can have geographical location "Bigtown" and functional location "Sales")

Permissions

The default **Permissions** for a new user are "Add" for Files (e.g. adding data files like Accident Reports); "None" for People and "View" for Responsibilities. To change the default permissions, an Administrator must go to **Permissions** and make selections in the upper section. To adjust individual permissions, use the section below

To provide a guide to setting individual permissions, consider the following:

Administrators can see or do anything and they have extra internal settings such as CSV uploads, auto archiving, escalations. Administrators can also view and modify any other Administrator's personal details
For Files, a permission "None" will decline the user viewing, adding, editing or deleting data files
For Files, a permission "View" will allow the user to see any data file unless specific file types have been overridden for that user
For Files, a permission "Add" will allow the user to add data files and edit only their own files. When receiving a Task, they can enter a completion date but cannot edit Task details. Specific file type overrides may apply
For Files, a permission "Edit" will allow the user to view, add or edit any data files, see other user's tasks and fully edit any task. Specific file type overrides may apply
For Files, a permission "Delete" will allow the user to view, add, edit or delete any files or tasks and see other user's tasks, Specific file type overrides may apply

For most users, the permission Add for files is adequate, but Edit provides the extra benefit of editing any Files or Tasks

For People, a permission "None" will decline the user viewing, adding, editing or deleting people or their personal details
For People, a permission "View" will allow the user to view people but NOT their personal details, such as contact details, next of kin, medical information and

confidential attachments
For People, a permission "Add" will allow the user to view and add people but NOT their personal details, such as contact details, next of kin, medical information and confidential attachments
For People, a permission "Edit" will allow the user to view, add and edit people AND view their personal details, such as contact details, next of kin, medical information and confidential attachments
For People, a permission of "Delete" will allow the user to view, add, edit and delete people AND view their personal details, such as contact details, next of kin, medical information and confidential attachments

For People, it is recommended the lowest practicable level of permission is set for the majority of users

For Responsibilities, a permission of "None" will decline the user viewing the Responsibilities tab
For Responsibilities, a permission of "View" will allow Locations and Responsibilities to be viewed
For Responsibilities, a permission of "Add" will allow Locations and Responsibilities to be viewed and added
For Responsibilities, a permission of "Edit" will allow Locations and Responsibilities to be viewed, added and edited
For Responsibilities, a permission of "Delete" will allow Locations and Responsibilities to be viewed, added, edited and deleted

For most users, the permission View for Responsibilities is adequate

Overriding Permissions for sensitive file types

Some files, such as **Rehabilitation Plans** (if this is included in your account), even **Accident Reports** and **Training Records**, may be considered personal and confidential. To override any general Permissions for access to Files, the Administrator can click on a user's name and see an "Override File Permissions" button. This reveals the file type list which allows overrides to the general File Permissions of that user

Mobile Settings

Here, Administrators can choose the settings they want for people to report events from mobile devices. The page lists all the file types currently available to you for mobile reporting. Ask SafetyPro 0800 000 267 info@safetypro.co.nz if you want further files to be configured for mobile reporting. Planning and review file types are not included, but reporting files such as Accident Reports and Inspection Checklists work really well on mobile devices. Click the check-box to activate a file type. You can start with one or two, then add more. Now, choose the defaults. Save the file type when done:

Default Status: A mobile reporter cannot choose a file's status because we want it to get noticed. It's recommended you choose any of the "open" status definitions as default. That way, it will show in the Open Files list on the Dashboard

Notify Role: This selects the role that gets notified once the mobile report has been submitted. Roles can vary location by location, so check under the Responsibilities tab. If you want Role X to be notified at (say) a regional location for a specified file type, then in the Responsibilities tab, click on the name of the region and allocate that role to a person

Default Location: Set a default location as a "catch-all" in case a mobile reporter does not know which location the event is at. (Mobile Reporters can, however, select their location using a predictive text field)

Default Reporter: This setting is used when reporters log in using text or email authentication. It's a generic identity for non-system users. You must create at least one Mobile Reporter in your People tab. You may wish to give them the name "Mobile Reporter". When you have submitted the new Person, edit their name and check the "Reporter" check-box. Then, select them as Default Reporter in Mobile Settings

Save the file type

How to find the Mobile Reporter login page on a mobile device: You should have been issued a URL when you signed up for your account. If you no longer have this, contact SafetyBase on 0800 000 267 or info@safetypro.co.nz The page can then be placed on your mobile device in your Favourites/Bookmarks

Uploading existing files

You may wish to populate your SafetyBase account with existing files, such as *Accident Reports, Hazards, Training Records* etc. Administrators have 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

Auto archiving files

The file summary pages (e.g. **Accidents**/**Accident Reports**) show one line summaries of key details for each file. Over time, high volume file types, such as **Accident Reports** or **Training Records** turn into large pages. This eventually affects page load speeds and retrieval of the files you want to find

Administrators have a button on each file summary page near the top right called **Set Auto Archiving**. This allows you to type in a number of months (for that file type) after which files with a *Reported Date* older than the specified number of months will auto-archive. Archiving means they do not display on the summary page any more, but are still "visible" for the **Report Generator**. You can temporarily view archived files by using the "Include archived files" filter on file summary pages and you can un-archive files by editing them and unchecking the Archive box. Note: The auto archiving scan is set for once a day, so you probably will not see files have updated until the day after you change the setting

Escalations

The Administrator can set parameters for escalation. On every file type page (e.g. **Accident Reports**), the Administrator has an **Escalations** button. This sets Escalations for the File Type you are viewing:

1.Choose the Status that will trigger an escalation. (Normally, this will be an "open" status or equivalent). You can set different escalations for each status if appropriate, depending on urgency

2.Choose how long you want before the first escalation is issued ("Escalate after")

3.Choose how long you want between further escalations if the status remains the same ("Escalate every")

4.If you want users to be able to edit the start date/time for the escalation when they are in the parent file, tick "Allow escalation start time override" and add a prompt statement, such as "Escalate at", which will appear in the override field

5.Add an escalation message for the e-mail if you wish (e.g. "This Accident Report is still open and should be finalised"). You can also have relevant file details included in the e-mail. Call 0800 000 267 (in New Zealand), +64 9 535 4355 or email info@safetypro.co.nz to have the relevant file details added if you wish

6.Choose one or two recipients to receive the escalation e-mails and update the Escalation setting

Set up some standard reports

Go to the **Reports** tab. Click the "Add custom report" button and follow these simple steps:

â€¢Step 1. Choose the chart 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 spread sheet 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 appropriate. Now choose type of file to report and Location. (Selecting a Location reports that Location and all its children)

â€¢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

â€¢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

â€¢Step 4. 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 users 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

Now, to put your new Standard Report on your Dashboard, find it on the **Reports** page, click edit and select "Show on Dashboard". The Report will automatically update when any new file is added. *Remember that if your Standard report has a date range or specific location, new files outside that range or location will not be included when they are added*