Administrator level FAQs

Set up

I'm setting up SafetyBase and when trying to allocate Responsibilities to Locations, I can't create people's names

First of all, set up the Locations. This is found in the upper part of the Responsibilities tab. Don't allocate Responsibilities yet. Then, go to People and create system users. The names you create will now automatically appear in the People drop-list when editing Responsibilities

Some of the People details, such as Medical Conditions are confidential. Also the attachments, associated files and the person's tasks. What controls are there?

Only Administrators can add or edit the information in the "Additional Details" section, such as contact details, next of kin and medical information
Be aware that Administrators can view and edit the details of other Administrators. 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
Only Administrators can add or edit Attachments to a person's account. These files may be personal and confidential; however:
Users with "Edit" or "Delete" permission for People can **view** the above types of confidential information, but in this case only Administrators can add, edit or delete; and:
In line with Privacy protocols, an authenticated user can view all their own details, but cannot add, edit or delete.
To view others' associated Files, (e.g a person's accident and training history), a user needs "View" for Files
To see the quick link to a person's Tasks, a user needs "Edit" for Files.This quick reference Tasks view may not be confidential for other users with the right permissions, but it is intended for the convenience of the actual user whose account it is. It's not intended for casual enquiry by other users. They can conduct highly filtered task searches elsewhere if they wish

Instead of manually setting up the People tab, can we do a bulk upload?

Yes, 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 20 files

Can SafetyBase integrate with Payroll?

Yes, but there would be a charge for any unique work required

What's the "Time zone" setting in a person's details, and when should we use it?

This is an individual setting for people who are working in a time zone that is different from the client default setting. It translates viewable dates and times into their local time zone. This means people will receive and view information that is accurate for them

When setting up Locations, what do I put at the top?

You can't add a new, higher top level location after you start, so it's best to name the highest conceivable level. For example, if you have overseas ownership or aspirations, it would be advisable to start the top level as Global

Why are Locations and People important?

SafetyBase recognises where users are in the hierarchy. This is important for notifications and filtering of relevant information

It is important to enter ALL your non user employees in the People page, so that you can associate them with files such as Accidents, Training, Health Monitoring and Hazards

Do I have to have a person allocated to all the position names listed?

No. These are generic positions for people who normally have some impact on health and safety. *You must, however, allocate the responsibility of **OHS Coordinator** to someone who is a system user.* We suggest you also allocate HR Manager, Plant/Equipment Manager, Property Manager and Line Managers. This will immediately give options for their participation in safety. The people you allocate to a responsibility *don't have to have that position as their title*, they just have to be the person who is prepared to perform that responsibility. For example, not every organisation has an HR Manager, but someone performs that role. Consider allocating more than one responsibility per person if appropriate

If you cannot allocate all the roles under "Responsibilities", don't worry. Any Tasks allocated to an "empty" role will default to the OHS Coordinator, who can pass it on to the right person. This is why the responsibility of OHS Coordinator MUST be allocated. The default to OHS Coordinator will show on the Locations page unless you allocate all Responsibilities

Can a person hold more than one Responsibility or be present at more than one Location?

Yes. For example, a Line Manager may have responsibilities for more than one Location. Another example could be (say) the HR Manager being the same person as the OHS Coordinator. These multiple responsibilities and/or Locations are understood by SafetyBase and you should not be concerned that it may cause problems. The more you can allocate, the better

How do I allocate a Responsibility to a Location?

First, click on the Location you want to use in the tree view at the top of the Responsibilities page. Then EDIT the role in the**Responsibilities** section below. Be careful to which location you allocate roles. The tab name will tell you which Location is displayed for editing. You must click on a Location before you edit Responsibilities for it

I need to allocate two or more Line Managers to the same site. How can I do this?

Create a sub section of the site or new site in the Locations panel first and allocate a Line Manager to each. Locations can be functional locations or geographic locations. All that matters is that people are engaged in that Location. For example, you may have two line managers at Location X. Warehouse and Sales, for example, can be created as "children" of Location X. You can now allocate a Line Manager to each, even though one is a functional location (Sales)

Can I include external users in the People page such as advisors and providers, consultants, treatment professionals and contractors?

Yes, as long as they have access to the Internet and e-mail. Just add them to the People page, but think carefully about their Permissions and which file types you want them to see. Administrators can override general Permissions for files by clicking the person's name. Unless the person is an Administrator too, there is an "Override File Permissions" button at the top left of their page. The Administrator can then select overriding permissions for semsitive file types (e.g. Rehabilitation Plans)

Can we allocate roles to off-site and overseas functional experts and share the system between groups of employers?

Yes. You can make any external provider part of your team. Again, though, you need to consider their Permissions very carefully

Can we hide files and activities of Divisions in our Location Hierarchy from other Divisions?

Yes. This is a special arrangement that's normally part of the initial set-up. It allows a hierarchical view of activities based on where in the hierarchy you are. It's not a client setting. If you want to know more, call 0800 000 267 or email info@safetypro.co.nz

I have a long list on my People page. How can I find the person(s) I want?

For groups of people, you can use any one of the filters at the top of the page or in a combination to reduce the number of possibilities For a particular person, just start typing in the search box below the filters and a progressively narrower list is generated as you go. Note that this type of search tool looks at all the letters you use, not the sequence of letters. This is better for finding misspelled names

Can we archive people who have terminated employment?

Yes. Only Administrators can archive people. You can either enter a date in the person's Termination Date and submit the form, or click the blue archive icon against their identity in the People Tab. Either way, you get directed to the Archive Options page. This page has an archive button which will indicate if they can be archived yet. If the person has duties, roles, tasks, watchlists etc, they will be listed and an icon will be available for you to resolve the associations

Here are some key facts about archiving people

Archiving people â€œhidesâ€ the selected person from view and they no longer count towards your number of workers
Only Administrators can archive people
Administrators can â€œUnarchiveâ€ people
An archived person will retain their personal history
People must have all their temporary associations, such as tasks, watchlists, responsibilities and group memberships re-allocated or stripped out BEFORE they can be archived
The system will list all such associations for you and provide links to lists where you can resolve the associations
People associated with a file (e.g. a Trainee in a Training Record) remain associated with the file as part of their history. So the system does not list these associations during archiving
Archiving is an important way to regulate the number of people in your account. If you add more person(s), you will be able to equalise numbers by archiving those who have moved on
A useful side-benefit is the ability to view any personâ€™s associations and re-allocate where required. For example, duties for workers who are shifting roles or locations, but not terminating their employment
Note: Archiving is not intended to de-activate a userâ€™s account because in many cases, archiving will only be completed some time after Termination Date. Use the â€œTermination Dateâ€ field to rescind access for users

Can we hide the files and activities in some of the Divisions in our Location Hierarchy from other Divisions?

Yes. This is a special arrangement normally selected before the account is created. It allows hierarchical views of your account, depending on where in the hierarchy you are. It's not the standard set up so you will need to call SafetyPro on 0800 000 267 or email info@safetypro.co.nz to find out more

What is the Groups tab for?

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, allocating people to a group is a label that may be useful in searches and filters

What do the Permissions do?

Editing Permissions should normally only be done by the Administrator. Note that when you add a person, their default Permissions for Files, People and Responsibilities will mirror your organisation's default settings under the Permissions tab. To change their Permission Settings, you need to set their profile up in the lower part of the Permission tab. The drop-lists allow None, View, Add, Edit and Delete for each user. Delete is the top level

In Permissions, what are the categories "Files", "People" and "Responsibilities" for?

"Files" are the data entry fields associated with the navigation bar at left of the screen. These are the data collection files and they include Tasks

"People" relates to the addition or deletion of worker and User identities in the People tab.

"Responsibilities" is the page on which you can add and edit your hierarchy of Locations and add or edit Responsibilities. It would be normal that only the local Administrator would edit or delete People and Responsibilities/Locations

We may wish to make some files highly confidential. How can we restrict access to these files only?

When an Administrator clicks on any person's name (unless they too are an Administrator), there is an Override File Permissions button at the top left of each of their page. This allows the Administrator to set a specific permission for each file type

What is the "time-out" duration when there is no activity?

40 minutes

Monitoring and maintenance

What about help and support?

It is recommended that users initially call their 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

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 is equivalent to closed. (Status names for "Open" may vary depending on the file, but it's always very clear which one is "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

Can we limit the view to "current" files on any file summary page, for housekeeping purposes? (E.g. Accident Reports in the last 12 months)

Yes, as Administrator, you 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. They display in a darker background. You can un-archive files using the left-sided check boxes or, while editing a file, unchecking the Archive box near the top of the fields.

Note: The auto archiving scan is set to execute once a day, so you probably won't see an update until the day after you change the setting

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 lists by clicking "Remove from Watchlist" at the right of each file on the Watchlist page

What is the red disc with a number in it, near the top of the page?

This indicates that there are Tasks awaiting completion. (Some Tasks are automatically created, so the disc is there to remind you). Click on the disc or visit your Home Page/Tasks tab to manage these Tasks

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

What other reports are there, so we can get information about upcoming Tasks, or which people have overdue Tasks etc?

Two main ways:

First, in the Reports page, there are two standard reports that automatically populate. One is a Calendar style page, showing Tasks due in the current month and the two months following. There are page filters in the Calendar, so you can drill down to make enquiries about Tasks belonging to particular file types, locations, specific people and date ranges

Secondly, there is also a list-type Task Report, called "All (your organisation name) Tasks". This has a similar filtering system to the Calendar

Can we have Reports that stay current without re-running them?

Yes. If you leave the date range open, any report, including charts, will update when a new "qualifying" file is added

How can we place Custom reports on the Dashboard?

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

Can we edit or add to the Accident Statistics information?

Yes. The source files are Accident Reports. You can either visit the individual Accident Reports and update the "Days Lost & Costs" tab, or you can make a collective update as follows: Go to the Reports Page. Click on "Days Lost & Costs" in the Standard Reports list. 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

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

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

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

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

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

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

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

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

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

Yes. 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

What information can we download?

Custom reports can be downloaded as a CSV if they are a list. Go to the Reports page and look for the CSV link for those file types. The download can then be converted to a full spread sheet and the data converted to charts using functions such as Excel's pivot tables. For charts, look for the tile icon, which lets you download it as a pdf, or a choice of image files. Many pages include a "Download PDF" button, including individual files or their summary pages. These Information pages can also be downloaded