



COMPANY SETTINGS

Training Guide



Company Settings

The first step in setting up your system is to update your Company Settings. Set up your Sites & Supervisor for workflows. Locations can be added in advance for workers' forms and searchability. Areas and Employee Tags will help with tracking employees. Choose the Certifications you want to track and more.

Objectives

» By the end of this training guide, you will have an understanding of:



Set Mandatory Orientation Courses, HSE Incident Recipients and more.



Create Sites and assign Supervisors for workflows



Create Locations ahead of time for your workforce for them to select on a form



Create Areas with a set manager and team for easy tracking



Create Employee Tags for easy tracking



Add the names of the Certifications you want to track.



Create Schedulers/ Reminders for your workforce and track progress



Reduce Equipment Downtime, With Asset Management

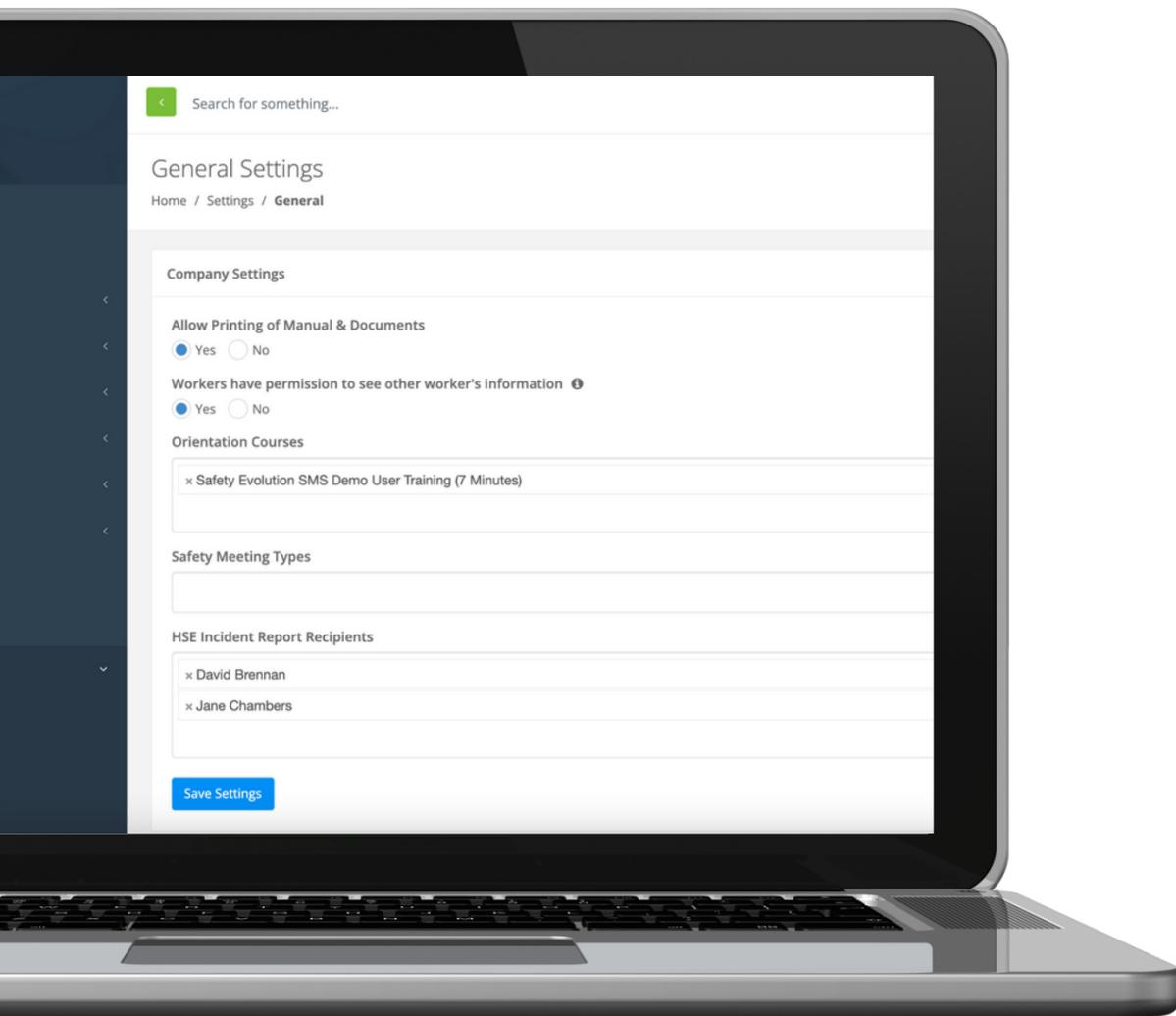


General

1

General

» Set Mandatory Orientation Courses, HSE Incident Recipients and more.



Allow Printing of Manual & Documents - Upgrade to the system coming, currently legacy and will be replaced/updated.

Workers have permission to see other worker's information - Contact List in Web-Based Software on the side menu.

Orientation Courses - set mandatory orientation courses that workers must complete before getting system access. Ex Company Orientation, WHMIS

Safety Meeting Types - Will be removed, Legacy item.

HSE Incident Report Recipients - An early email notification that gets sent out with: *Site, Location, Date & Time of incident, Date & Time Reported, Title, Description, Assigned to and Due Date.*

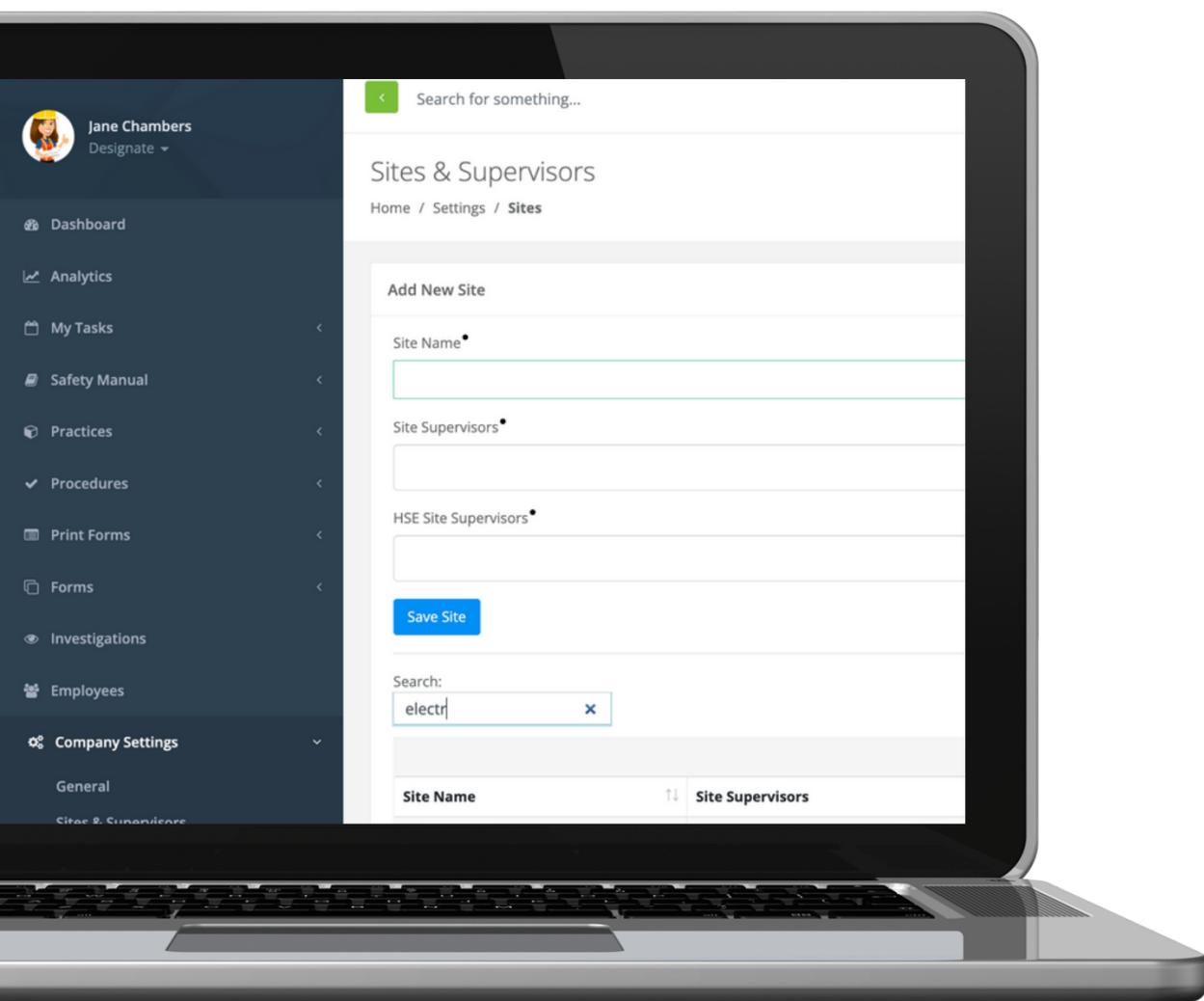


Sites & Supervisors

2

Sites & Supervisors

» Create Sites and assign Supervisors for Corrective Action workflows



Site: Sites are an identifier that facilitates system-wide workflows for your team. This is the heart of the program.

Therefore, the naming convention of Sites should consider the following:

- Only one Site - This is often an identifier using the initials of the company name (ABC for A.B. Construction) This works well when you want simplicity for the workers, if the company is small or if the company works in multiple non-permanent job sites.
- Multiple Sites - If there are several divisions (plumbing, heating, electrical, etc.), or permanent worksites, each with its own Supervisor, then add these to Sites and they will appear in the dropdown menu on all forms.

Continue reading->

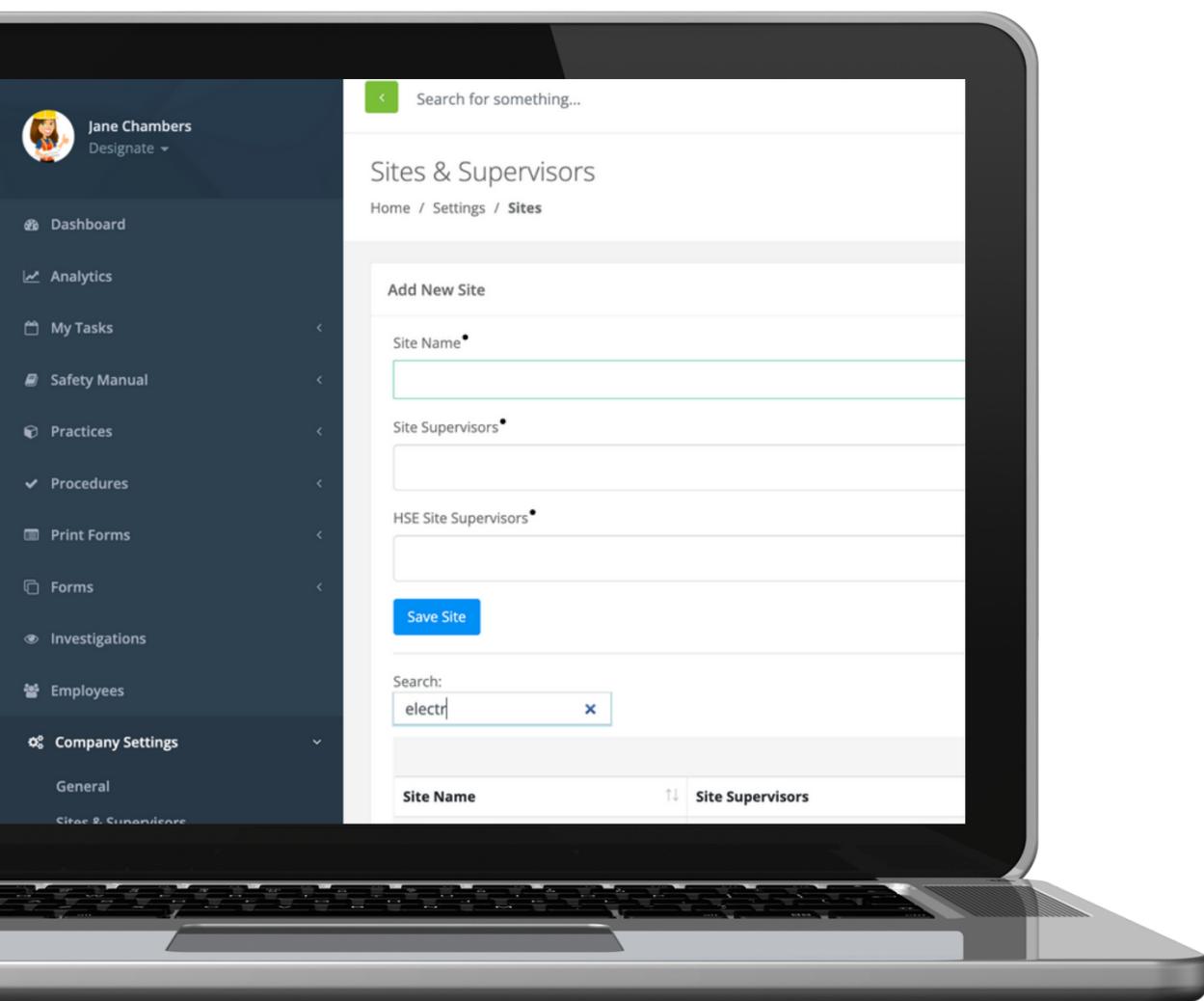


Sites & Supervisors

2

Sites & Supervisors

» Create Sites and assign Supervisors for Corrective Action workflows



Examples of Site Naming conventions:

- One division reporting to the same Supervisor team would only choose one Site. This would simplify the workflow for the team.
 - Example:
 - ABC Company
- Companies working with multiple supervisors with individual teams would choose to use multiple sites to ensure forms, action items and information get to the right Supervisor or team.
 - Example:
 - Mechanical
 - Plumbing
 - Electrical

***Remember, you have Locations on the form as well to highlight information such as physical location, job #, client, etc.*



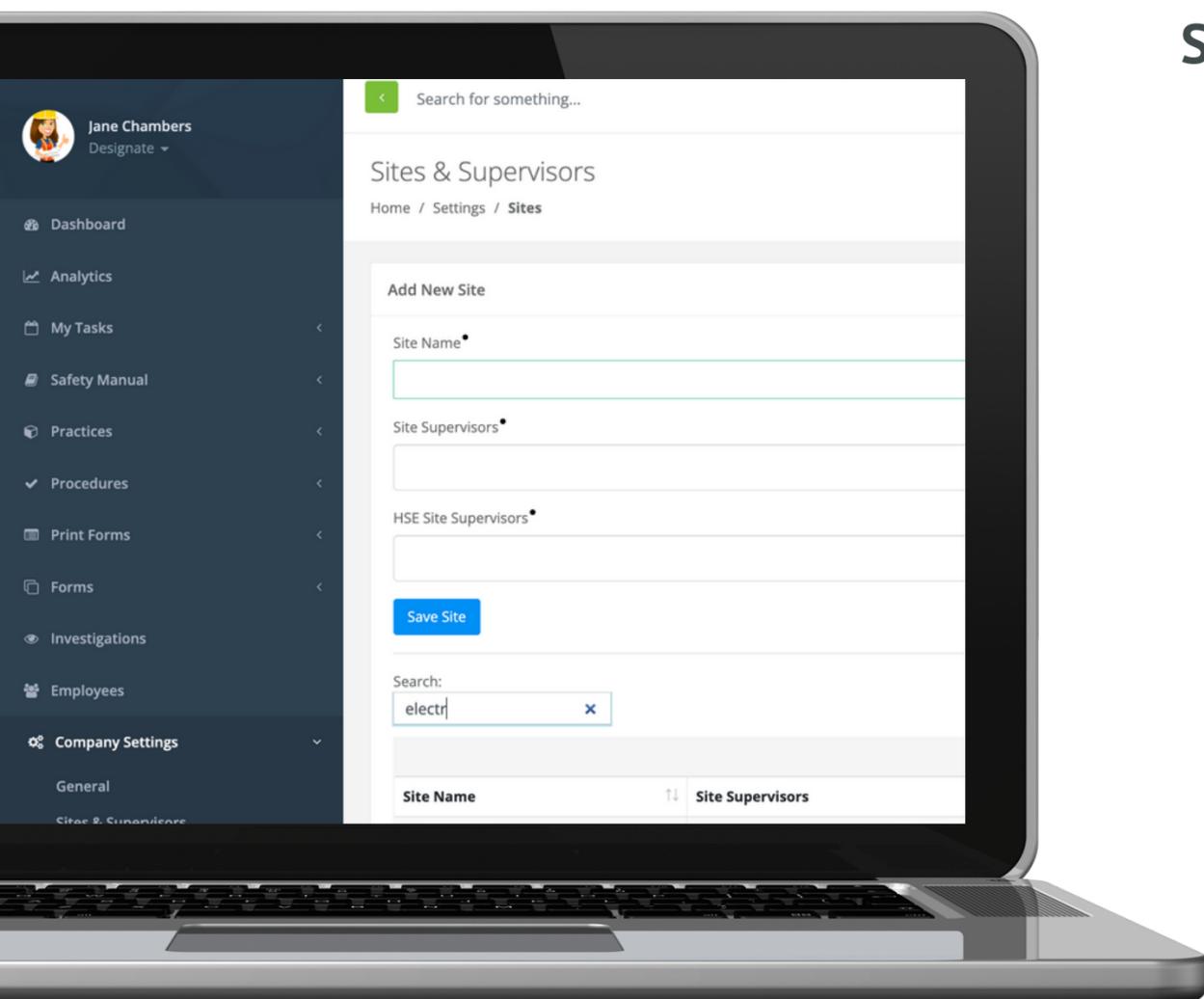
Continue reading->

Sites & Supervisors

2

Sites & Supervisors

» Create Sites and assign Supervisors for Corrective Action workflows



Some other factors to consider when adding multiple Sites to your system:

- **Equipment:** Are pieces of equipment assigned to certain worksites or divisions within the company? If so, then your Asset Management will indicate activity/incidents/repairs etc. for each Site.
- **Scheduler:** If you have Supervisors responsible for one worksite or division, the reminders for inspections, safety meetings, etc. can be scheduled at times specific to their “Site.”
- **Location:** When the company wants to be able to search by physical location, job #, Client name etc. these can be added under Location. More specific information can be added to Location when the form is opened.

Continue reading->

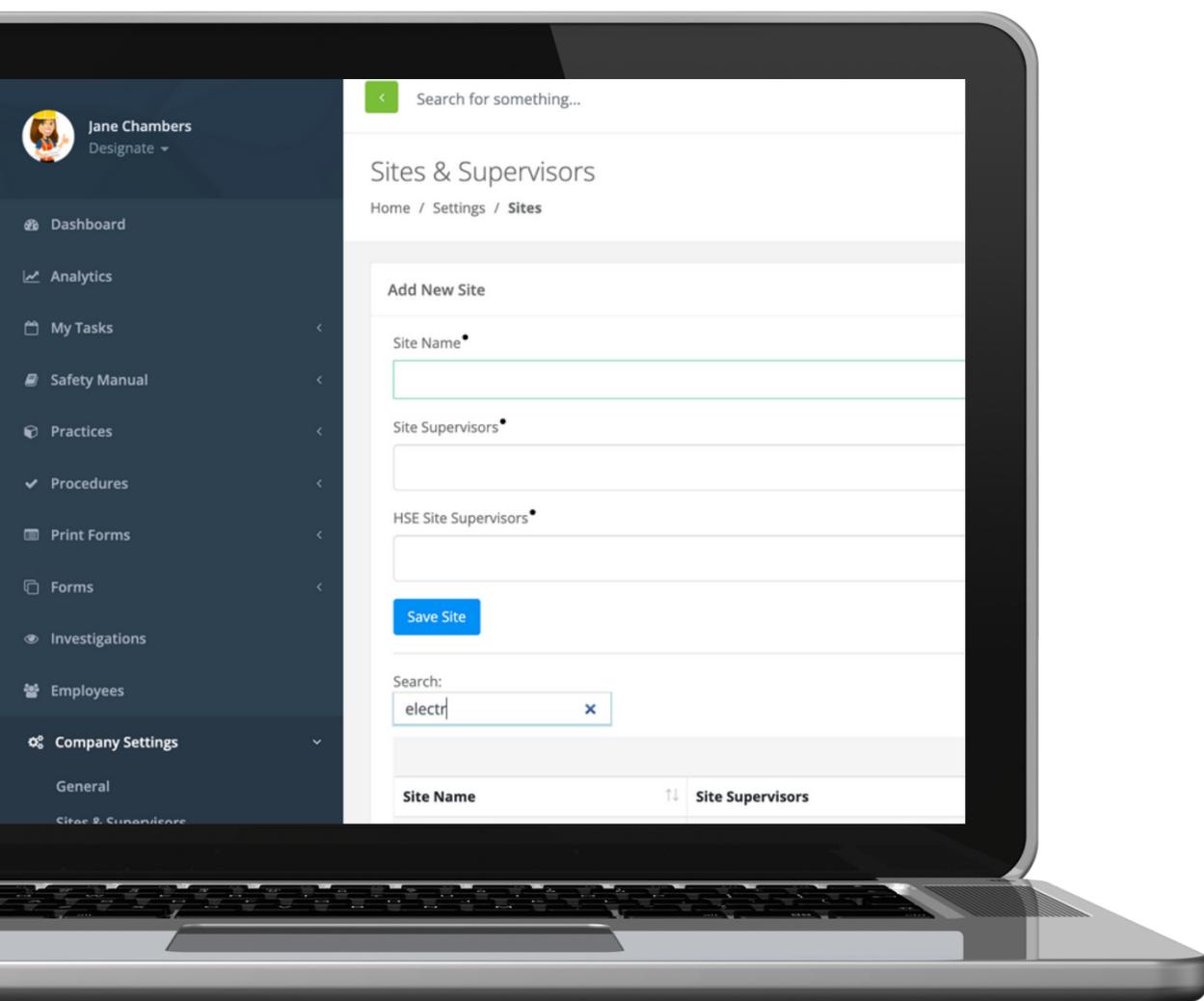


Sites & Supervisors

2

Sites & Supervisors

» Create Sites and assign Supervisors for Corrective Action workflows



Supervisors: When assigning Supervisors and HSE Supervisors it is important to know who gets what notifications. Therefore consider the following:

- **Site Supervisors** - Are notified when corrective actions on forms are created from their site. They can then assign the corrective action to a worker for completion. Anyone who needs to see the corrective actions can be added as a Site Supervisor. (Owners, Designates and Admins can see View All Actions Items for the company.)
- **HSE Supervisors** - Within the Investigation system, when a worker fills out the initial incident report, the HSE Supervisor gets the "Early Incident" Reminder emailed to them as the form is saved. The HSE Supervisor will do the assessment and assign the investigation for completion. A Notification with these details is automatically sent out to your management group on the General tab.

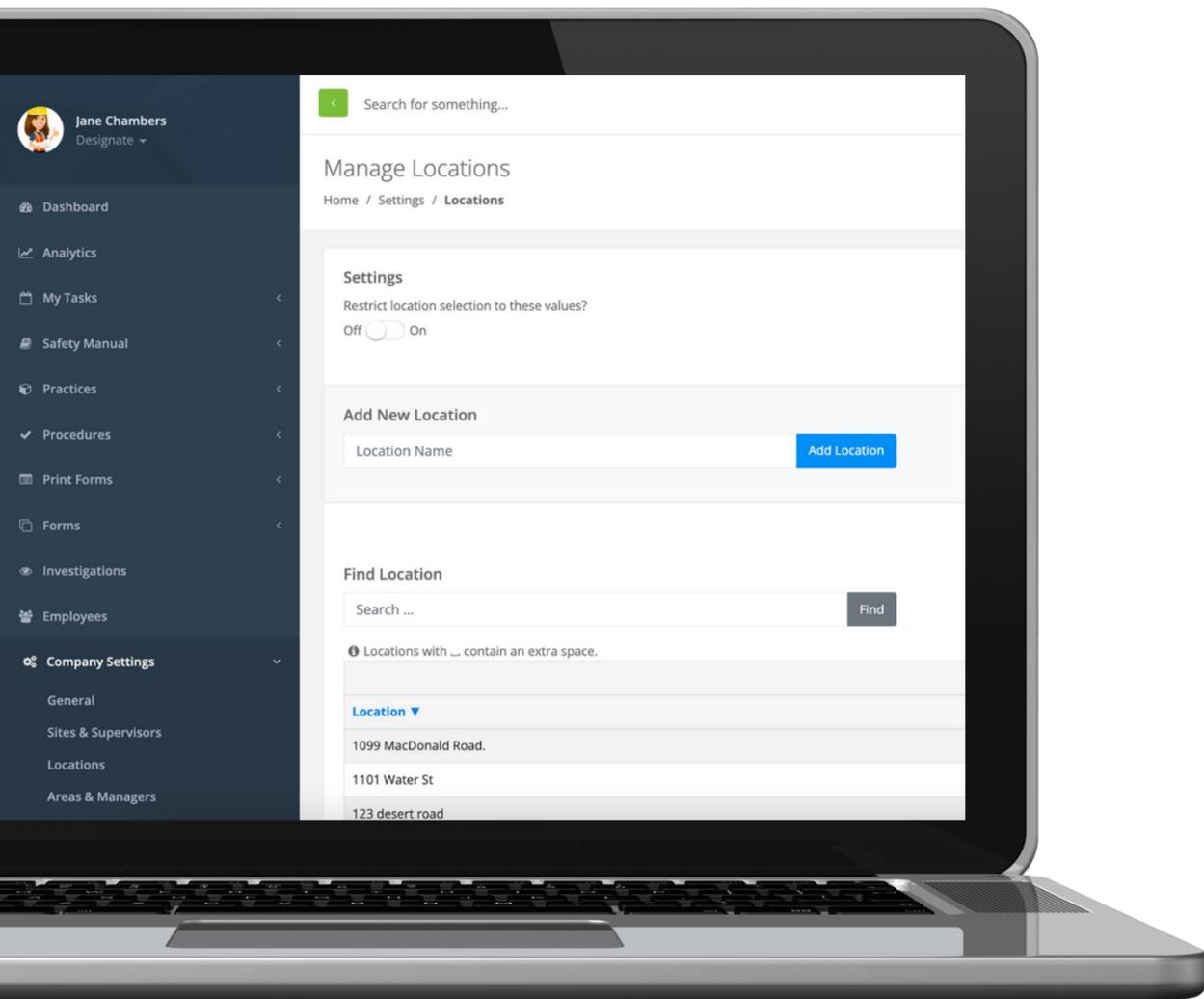


Locations

3

Locations

» Create Locations ahead of time for your workforce for them to select on a form



Locations are listed on every form created by your workers. You can control Locations through this portal by:

- Add Location - create a new location value
- Deactivate - remove locations from appearing on forms
- Restore - bring back deactivated locations
- Restrict location selection to these values? - toggle on and off to allow workers to add new locations or to disable the ability.

Examples of Locations are:

- Job #, physical location, client or other identifiers used by your company.

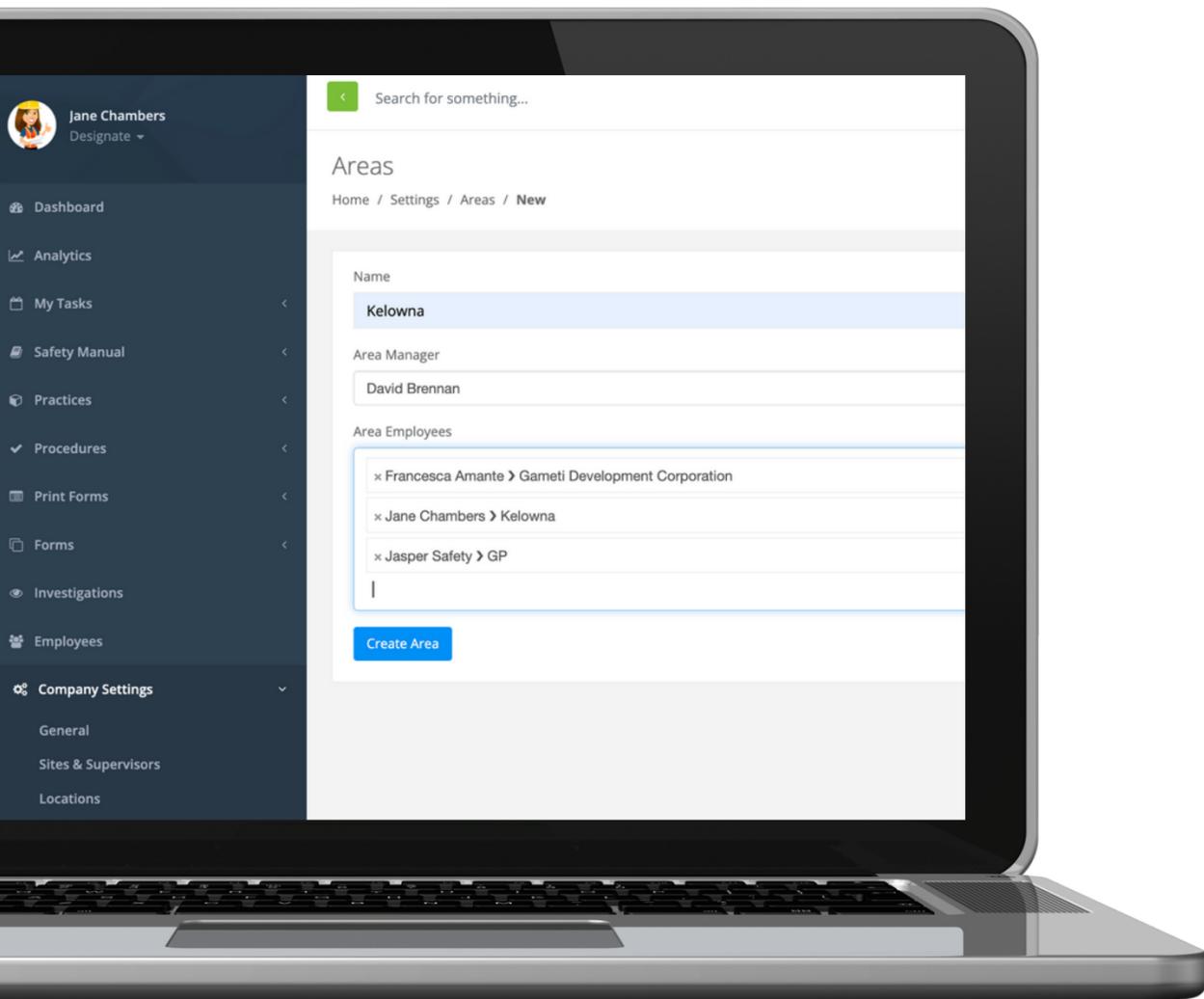


Areas & Managers

4

Areas & Managers

» Create Areas with a Area Managers and Area Employees



Add **Areas** to assign an **Area Manager** and **Area Employees** for better tracking of your workforce.

Within the Employee section, you can filter your Employee page and Training Matrix to pull client-ready reports.

Areas would be helpful when looking at site-specific orientations. You can drill down on your Training Matrix to ensure each worker has completed the site-specific orientation.

The Area Manager's signature shows up on the auto-generated Training Certificate for custom courses when completed by workers and found in their Profiles.

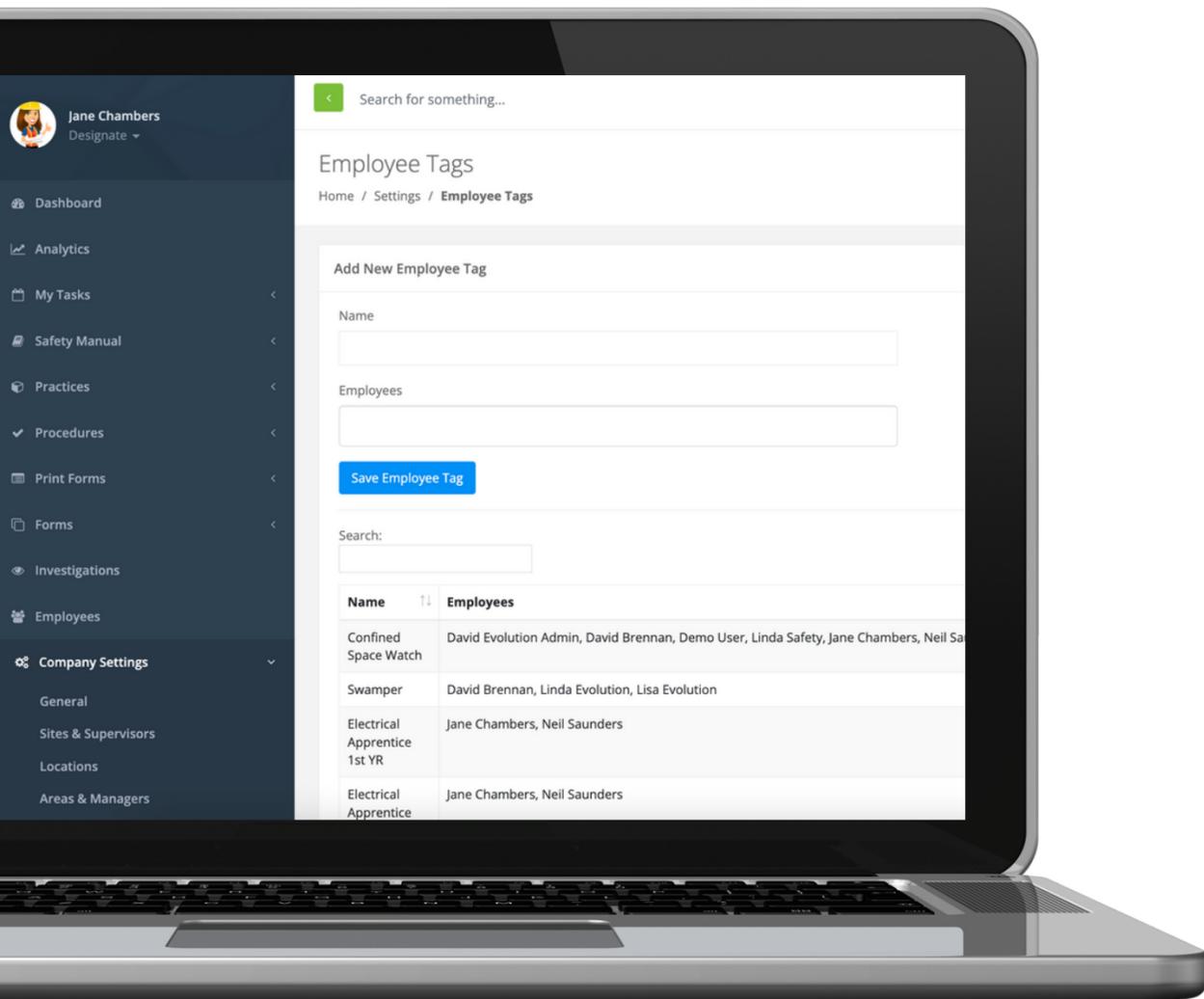


Employee Tags

5

Employee
Tags

» Create Employee Tags for additional positional tracking



Add **Employee Tags** to input additional notes on your employees such as positional tags.

Examples of Employee Tags:

- First Aid Responders, Confined Space Watch, Electrical Apprentice 3rd Year, etc.

Helping you easily identify groups of employees in your Employee list and Training Matrix, so you can find the right person with credentials to dispatch for the job.

It will also help you determine who needs to be trained in upcoming sessions.

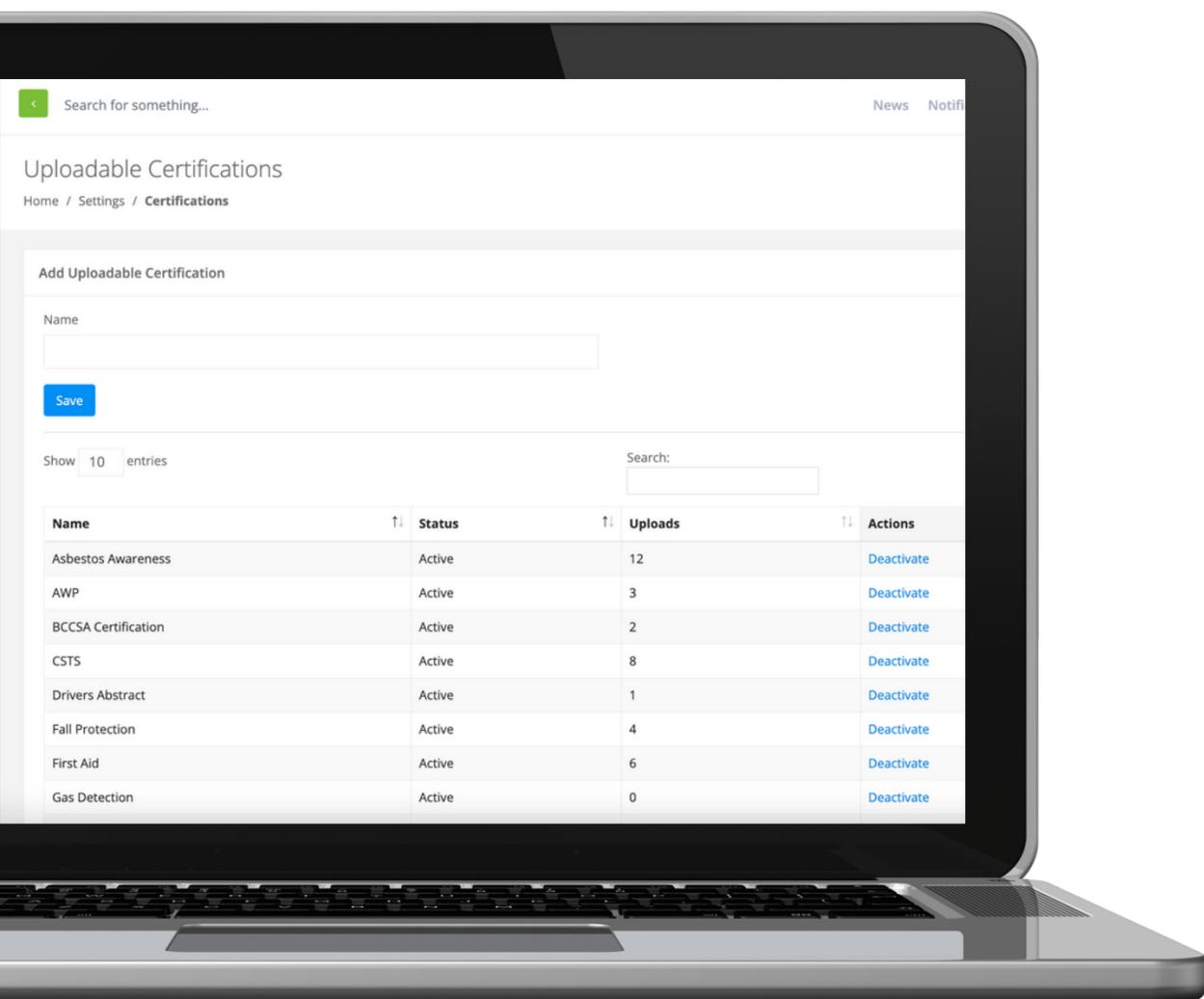


Uploadable Certificates

6

Uploadable
Certificates

» Add & Deactivate Certificates that your workforce can upload



Workers have different names for certificates. We tightened this process by allowing you to pre-populate the list of certificates your company tracks.

Create the names for the **Uploadable Certificates** you want your company to track.

Examples of Uploadable Certificates:

- Asbestos Awareness, Fall Protection, H2S Alive, WHMIS, etc.

Workers/Admins will only be able to upload the certificates you have populated here and they will be automatically added to your Training Matrix.

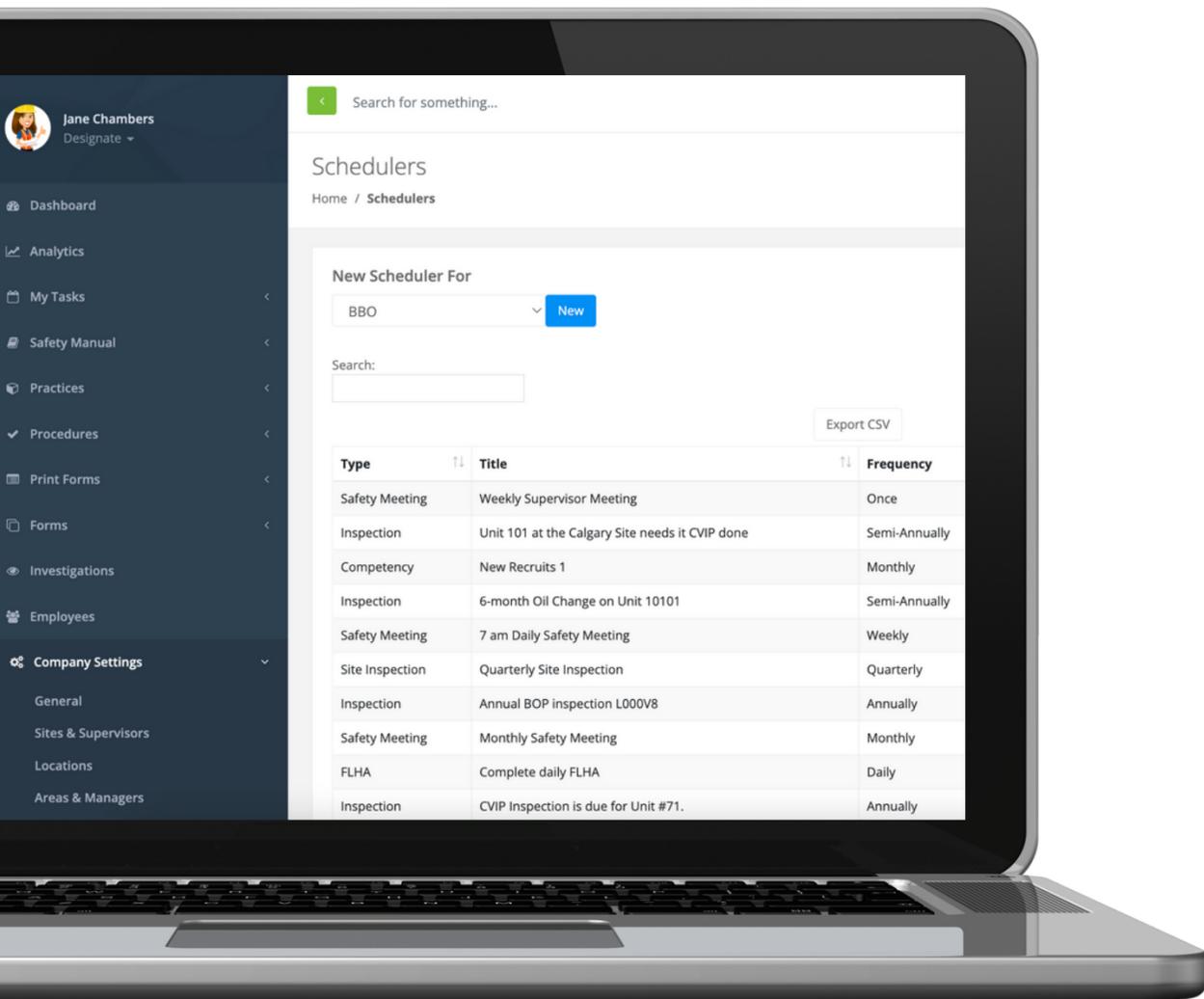


Schedulers

7

Schedulers

» Schedule reminders for form completion for your workforce



Major upgrade coming to the Safety Evolution system in Q1 2023.

With the recent upgrades in the Form Designer for all custom forms, one of the last pieces is getting them into the Scheduler. Currently on the Roadmap for Q1 2023.

Your Customer Success Manager will work with you 1-on-1 to get **Schedulers** for your workforce in the system.

Stay tuned!

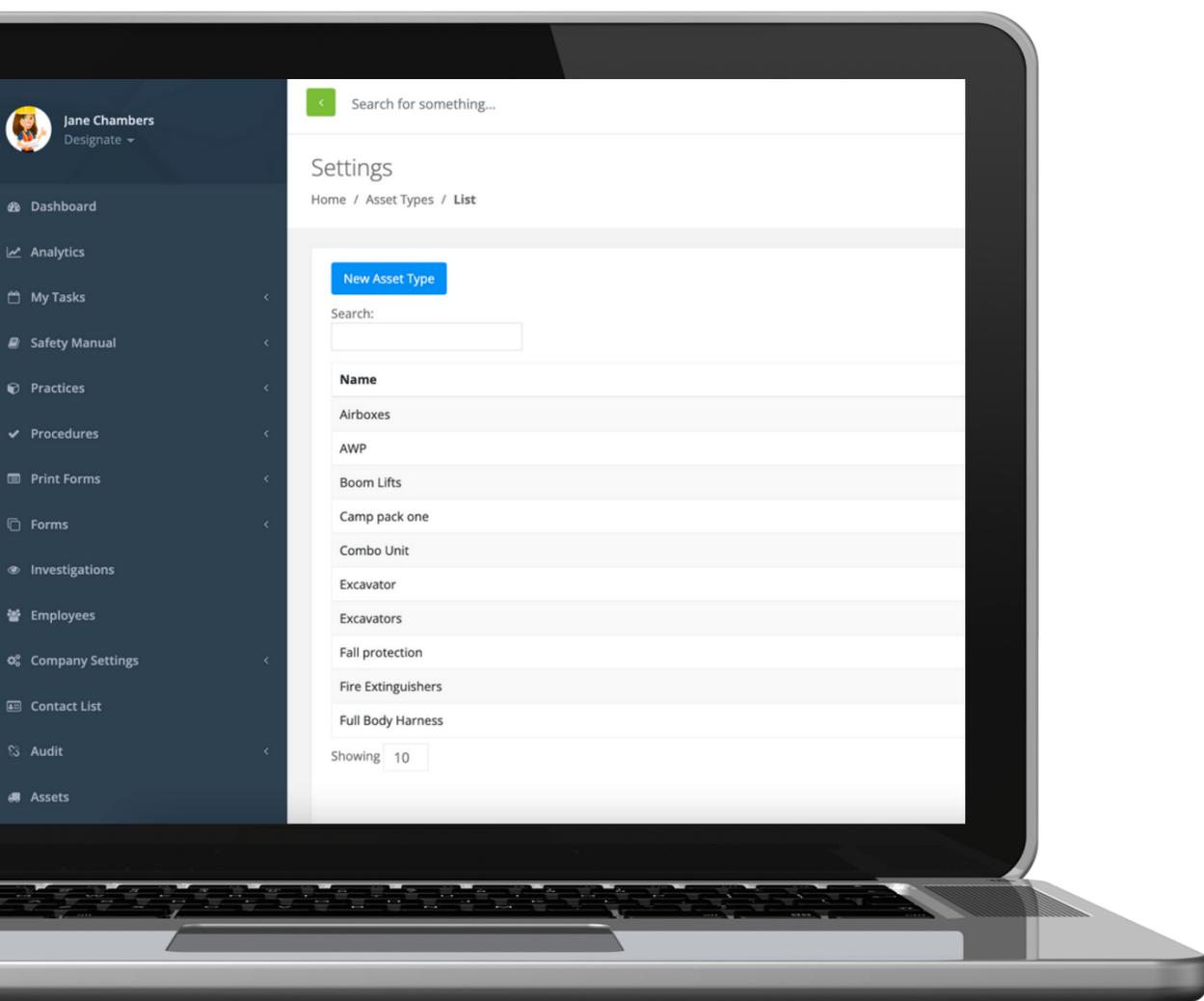


Asset Definitions

8

Asset
Definitions

» Reduce Equipment Downtime, With Asset Management



Upload asset groups/categories into the system, and choose what properties you want to track such as **unit #**, **serial number**, **purchase price**, **make**, **model**, etc.

- Example:
 - Asset Definition Name: Light Duty Trucks
 - First property: Unit #
 - Second Property: Make
 - Third Property: Model
 - Forth Property: Purchase Price
 - Fith Property: VIN

Properties can be edited and rearranged for ordering at any time.

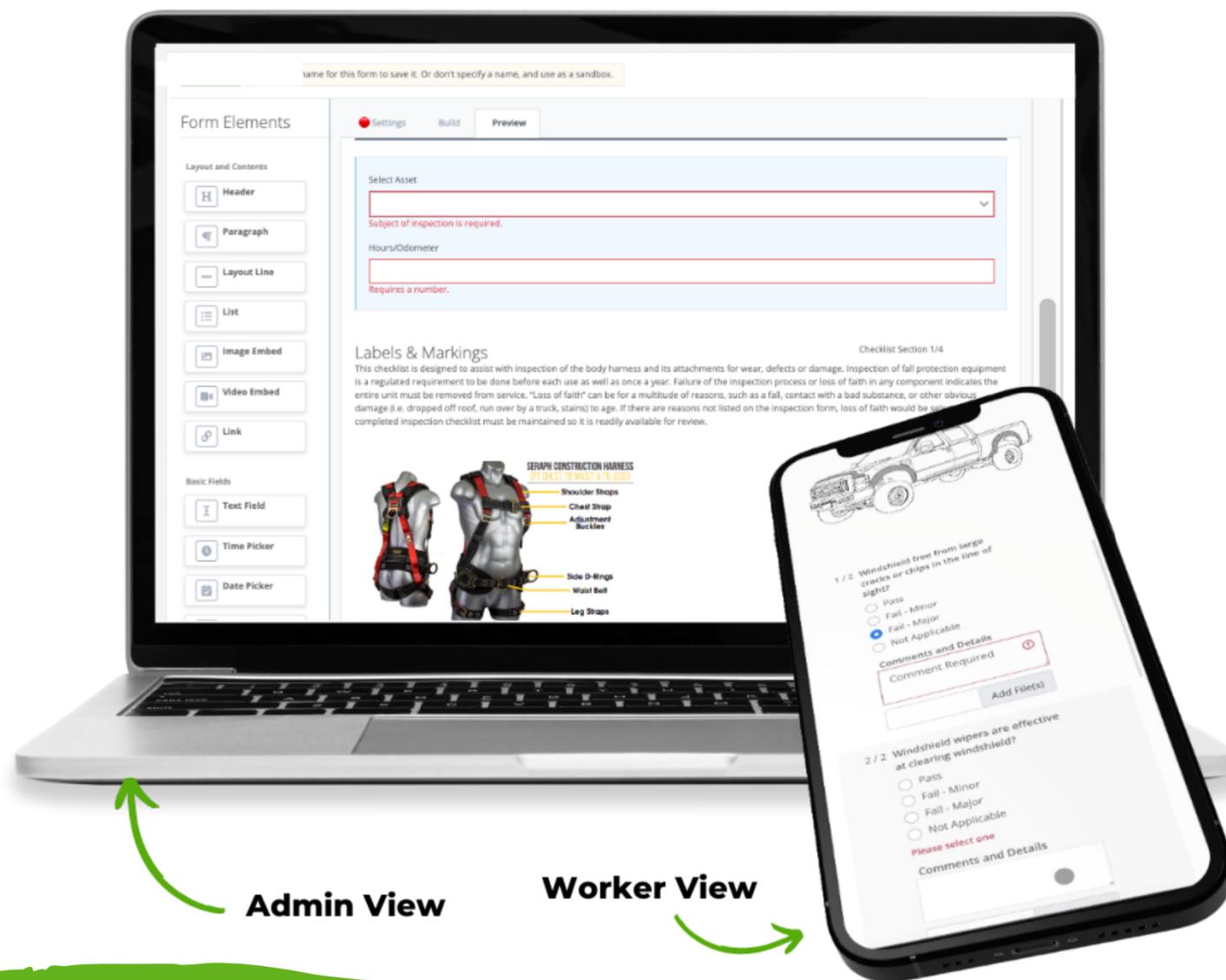
See [Asset Management Training Guide](#) for more information



Form Designer

Form
Designer

» Build Digital Safety Forms That Do What You Want



Admin View

Worker View

Safety Evolution's Form Designer gives you the ability to digitize all of your safety paperwork with powerful modules that initiate alerts/notifications, capture worker and third-party signatures, and make tracking your assets, employees, sites and locations effortless.

See [Form Designer Training Guide](#) for more information

The Form Designer is one of the most powerful systems and will be a training session in itself.



Training Checklist

» Company Settings are the 1st item on the onboarding checklist to complete



- General
- Sites, Site Supervisors & HSE Supervisors
- Locations
- Areas & Managers
- Employee Tags
- Uploadable Certificates
- Schedulers
- Asset Definitions (own Training Session)
- Form Designer (own Training Session)



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<https://www.safetyevolution.com/knowledge>

Other questions?

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