



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 Employee Tags for easy tracking



Add the names of the Certifications you want to track.



Create Schedulers/ Reminders for your workforce and track progress



Create Areas with a set manager and team for easy tracking



Reduce Equipment Downtime, With Asset Management



General

Set Mandatory Orientation Courses, HSE Incident Recipients and more.

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	safety Evolution SMS Demo User Training (7 Minutes) Fety Meeting Types E Incident Report Recipients David Brennan Jane Chambers ave Settings

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.*





Create Sites and assign Supervisors for Corrective Action workflows

Jane Chan	nbers	Search for something
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🗂 My Tasks	<	Site Name [•]
🛢 Safety Manual	<	
Practices	<	Site Supervisors [•]
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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.

- on all forms.



• Multiple Sites - If there are several divisions (plumbing, heating, electrical, etc.), or <u>permanent</u> worksites, each with its own Supervisor, then add these to Sites and they will appear in the dropdown menu

Continue reading-



Create Sites and assign Supervisors for Corrective Action workflows

Jane Chambers	Search for something
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🗠 Analytics	Add New Site
🗂 My Tasks 🗸 <	Site Name [•]
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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->



Create Sites and assign Supervisors for Corrective Action workflows

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

- indicate activity/incidents/repairs etc. for each Site.
- scheduled at times specific to their "Site."
- opened.



• Equipment: Are pieces of equipment assigned to certain worksites or divisions within the company? If so, then your Asset Management will

• Scheduler: If you have Supervisors responsible for one worksite or division, the reminders for inspections, safety meetings, etc. can be

• 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

Continue reading->

Create Sites and assign Supervisors for Corrective Action workflows

Jane Chambers	Search for something
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Analytics	Add New Site
🗂 My Tasks 🧹	Site Name*
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✓ Procedures <	
Print Forms <	HSE Site Supervisors
Torms <	Save Site
 Investigations 	
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General	Site Name
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Supervisors: When assigning Supervisors and HSE Supervisors it is important to know who gets what notifications. Therefore consider the following:

- Admins can see View All Actions Items for the company.)
- out to your management group on the General tab.



• 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 • **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 🧭

Locations

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

Jane Chambers	Search for something
Designate +	Manage Locations
🍰 Dashboard	Home / Settings / Locations
Analytics	Settings
🛱 My Tasks	Restrict location selection to these values?
Safety Manual	<pre>Off On </pre>
Practices	
✓ Procedures	Add New Location
Print Forms	
🗅 Forms	
 Investigations 	Find Location
嶜 Employees	Search Find
🌣 Company Settings	Locations with contain an extra space.
General	Location V
Sites & Supervisors	1099 MacDonald Road.
Areas & Managers	1101 Water St
	123 desert road

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

- disable the ability.

Examples of Locations are:

your company.



 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

• Job #, physical location, client or other identifiers used by



Areas & Managers

Create Areas with a Area Managers and Area Employees

Jane Chambers	Search for something
Designate 🗸	Areas
න Dashboard	Home / Settings / Areas / New
🗠 Analytics	Name
🛱 My Tasks 🧹	Kelowna
Safety Manual <	Area Manager
Practices <	David Brennan
✓ Procedures <	Area Employees
Print Forms <	× Francesca Amante > Gameti Development Corporation × Jane Chambers > Kelowna
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Investigations	1
쭐 Employees	Create Area
🕫 Company Settings 🗸 🗸 🗸	
General	
Sites & Supervisors	
Locations	

better tracking of your workforce.

and Training Matrix to pull client-ready reports.

has completed the site-specific orientation.

workers and found in their Profiles.



- Add Areas to assign an Area Manager and Area Employees for
- Within the Employee section, you can filter your Employee page
- Areas would be helpful when looking at site-specific orientations. You can drill down on your Training Matrix to ensure each worker
- The Area Manager's signature shows up on the auto-generated Training Certificate for custom courses when completed by



Employee Tags

Create Employee Tags for additional positional tracking

Jane Chambers	< Search for so	mething	
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Sites & Supervisors	Electrical Apprentice	Jane Chambers, Neil Saunders	
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Areas & Managers	Electrical Apprentice	Jane Chambers, Neil Saunders	
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Add **Employee Tags** to input additional notes on your employees such as positional tags.

Examples of Employee Tags:

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.

upcoming sessions.



• First Aid Responders, Confined Space Watch, Electrical

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



Uploadable Certificates

Add & Deactivate Certificates that your workforce can upload

Uploadable Certifications Ad Uploadable Certification Nme Stell Toterion Note Search: Note Note Note Search: Note	Search for something			News Notifi
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Name Save Save Search: Show 10 entries Search: Name 1 Status 1 Uploads 1 Actions Asbestos Awareness Active 1 Deactivate AXP Active 3 Deactivate SCSA Certification Active 2 Deactivate GTS Active 4 Deactivate Fall Protection Active 6 Deactivate Gas Detection Active 0 Deactivate	Add Uploadable Certification			
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First Aid Active 6 Deactivate Gas Detection Active 0 Deactivate	Fall Protection	Active	4	Deactivate
Gas Detection Active 0 Deactivate	First Aid	Active	6	Deactivate
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			2222222	

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 Awarer 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.



• Asbestos Awareness, Fall Protection, H2S Alive, WHMIS,



Schedulers

Schedule reminders for form completion for your workforce

Jane Chambers	Search for somether	ing		
Designate -	Schedulers			
🕸 Dashboard	Home / Schedulers			
🗠 Analytics				
🗂 My Tasks 🛛 🗸	New Scheduler Fo	r		
🖉 Safety Manual 🛛 🔍 <	BBO	✓ New		
Practices	Search:			
A Broadware			Expor	t CSV
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Print Forms <	Safety Meeting	Weekly Supervisor Meeting		Once
Forms <	Inspection	Unit 101 at the Calgary Site needs it CVIP done		Semi-Annually
 Investigations 	Competency	New Recruits 1		Monthly
Employees	Inspection	6-month Oil Change on Unit 10101		Semi-Annually
° Company Settings	Safety Meeting	7 am Daily Safety Meeting		Weekly
	Site Inspection	Quarterly Site Inspection		Quarterly
General	Inspection	Annual BOP inspection L000V8		Annually
locations	Safety Meeting	Monthly Safety Meeting		Monthly
Locations	FLHA	Complete daily FLHA		Daily

Major upgrade comi 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!



Major upgrade coming to the Safety Evolution system in Q1



Asset Definitions

Reduce Equipment Downtime, With Asset Management

in chambers iscarch for something Dashboard Settings MyTasks New Asset Types / List MyTasks New Asset Type Safety Manual Search: Safety Manual Name Aridoxes Aridoxes Procedures Aridoxes Prince Forms Compack one Company Settings Compack one Company Settings Excuvators For Contact List Forection Aridox Fill protection Fire Extinguishers Fill protection Fire Extinguishers Fill Body Harness Showing 10 Showing 10	Ine Chambers Desplante * Settings Analytics My Tasks Safety Manual Practices Print Forms Company Settings Investigations Employees Company Settings Audit Audit Showing: 10		
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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.



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

See Asset Management Training Guide for more information



Form Designer

Build Digital Safety Forms That Do What You Want

Form Elements	Settings Build Preview	
Layout and Contents	Select Asset	
H Header	✓	
Paragraph	Subject of inspection is required. Hours/Odometer	
Layout Line		
	Requires a number.	
Image Embed	Labels & Markings This checklist is designed to assist with inspection of the body harness and its attachments for wear, defects or damage. Inspection of fall protection equipment	
Video Embed	is a regulated requirement to be done before each use as well as once a year. Failure of the inspection process or loss of faith in any component indicates the entire unit must be removed from service. "Loss of faith" can be for a multitude of reasons, such as a fail, contact with a bad substance, or other obvious damage it.e. dropped off roor, mu over by a truck, stains to age. If there are reasons not listed on the inspection must be reasons.	
@ Link	completed inspection checklist must be maintained so it is readily available for review.	
Basic Fields	SERAPH CONSTRUCTON HARVESS OF DESIT RE WAST & TE LESS	
Text Field	Shoulde Shops Chat Shop	
Time Picker	Beckler Form Large of	
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	Worker View	
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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.

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



See Form Designer Training Guide for more information



Training Checklist

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





General

- O Locations
- **Areas & Managers**
- O Employee Tags
- **O** Uploadable Certificates
- **O** Schedulers
- **O** Form Designer (own Training Session)



O Asset Definitions (own Training Session)





Visit our Help Center for more articles on how to get started at:

https://www.safetyevolution.com/knowledge

Other questions?

support@safetyevolution.com