

Part I : Introduction to System Tools



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Thank you for choosing SafetySync, The leading online Occupational Health & Safety Management System. This guide will walk you through the digital tools for implementing your company health and Safety program into an Online Safety Management System. A SafetySync support agent is available toll free, [insert operating hours] at 1.866.668.6402. With full utilization of our program, and full implementation of your company Health and Safety program, SafetySync can help you stand out in the industry.

Note: Throughout this guide, text in **BLUE** with >>> will identify a set of steps to take in order to navigate your page according to the steps described.

Step 8: Components reviews content to be selected once steps 1 – 7 are clearly understood. The Components Criteria is critical to review before continuing on to 'Part II).

Part I : Introduction to System Tools

Step 1: Your Company Profile

The following information will help you set up your company profile in the online system. To get to this page, Navigate to **Admin > Company > Profile** after successful Login. This page is not accessible by employees who do not have Administrative permissions assigned.

S.No.1

Using this page, we customize your account to reflect your company branding – using logos, safety slogans, etc. See the list below of the functions of this page and, where relevant, a brief description of the benefits these fields provide. Ref. S.No.1.

Company Details

- Company Name : 'Sample Company'
 - This is a non-editable field that was determined when you created your account. The 'Company Name' field is what you enter in on the Login screen in order to access your company account.
- Primary Contact / #
- Bounce Email Address : When the system uses email features that become disabled (Example: Automated sending of a compliance report to an employee) these emails will be forwarded to the 'Bounce Email' indicated in this field to ensure no data is lost.

Current Mailing Address

- Completing these 6 fields will add your company Location information to printed certificates and other automated fields.

Signing Authority

- Name / Title / Email / Signature : It is recommended that you input the information and signature of your company president in this section. The Box beneath identifies items which you can attach that signature to, if selected or 'checked'. 'Automatically add signature to':
 - Reward Thank-You Enclosure Card : Only applicable if you have chosen to participate in SafetySync's Rewards Program.
 - Printed Certificates : For example, when staff complete our WHMIS 2015 Course it will appear with the company logo and management signature displayed on the Wallet Card & Certificate of completion.
 - Training Compliance Reports
 - Policy Compliance Reports
 - Procedure Compliance Reports
 - Certificate Compliance Reports

*Adding the signature in this area also provides the opportunity to attach the signature to Policies as they are uploaded as text/open format.

Customize Design

- Company Logo : This image will appear on open format policies, on your login page, on printed certificates and branded all throughout your online system. Please be sure to upload a clear image file in this field.
- Login Page Image : This is the image that appears on the side of the 'Login Page'
- Safety Slogan : Upload a short and striking or memorable phrase used in advertising. A company motto. (Optional)
- Background Color/Font Color : Modifies the way text is displayed to the user.

Company Specific Login URL

Add this link to your intranet or corporate website so that workers can easily access your Safety Management System.

You may also ★Bookmark/Favorite this link for ease of access during future logins.

****Before navigating away from pages you are working in or modifying, remember to 'Save Changes' so that none of your information is lost.***

Step 2: Company Locations

To Navigate to this page go to: [Admin > Company > Locations](#) .

Location Name	Street Address	City	Prov/State	Forms Status	Employee(s)	Equipment	Average Compliance
Head Office	1006 - 11 Ave SW (2nd Floor)	Calgary	Alberta	Overdue	13	1	6%
Packaging	555 Blue Berry Drive	Saskatoon	Saskatchewan	-	Jim Carrey	3	0%
Peace Country	555 River View	Peace River	Alberta	-	2	3	9%

S.No.2

Next, choose 'Add Location' which will bring you to a page that looks like the image below (S.No.3):

Location Name :

Suite #:

Street Address :

City :

Province / State :

Country :

Postal Code :

View Map:

Format : International format

Phone Number :

Fax Number :

*Any faxed records received from this fax number will automatically be assigned to this location.

Emergency Number :

ERP : No file chosen

[ACTIVE WORKERS](#) [FORM FREQUENCY](#)

S.No.3

Complete as much information on this page as possible for each individual location/shop/office/field as needed. When entering in your location(s), consider the types of equipment, records and employees you have at those locations.

- The 'Emergency Number' field refers to an emergency number for that specific location.
- The 'ERP' is a great PDF to upload for specific locations using the 'Choose File' option and selecting the PDF Emergency Response file from your computer.

***Before navigating away from pages you are working in or modifying, remember to 'Save Changes' so that none of your information is lost. You can go back to [Admin > Company > Locations](#) to continue to add to the locations list.**

Step 3: Organizational Chart

Since personnel are one of the greatest assets to a company, it only makes sense that the Organizational Chart act as a building block in the foundation of your Online Safety Management System – SafetySync.

Note that many company org charts/reporting structures are written in a horizontal fashion. Utilizing our ‘Positions’ tool, you will be required to input the reporting structure in a vertical format which will be explained later in this step.

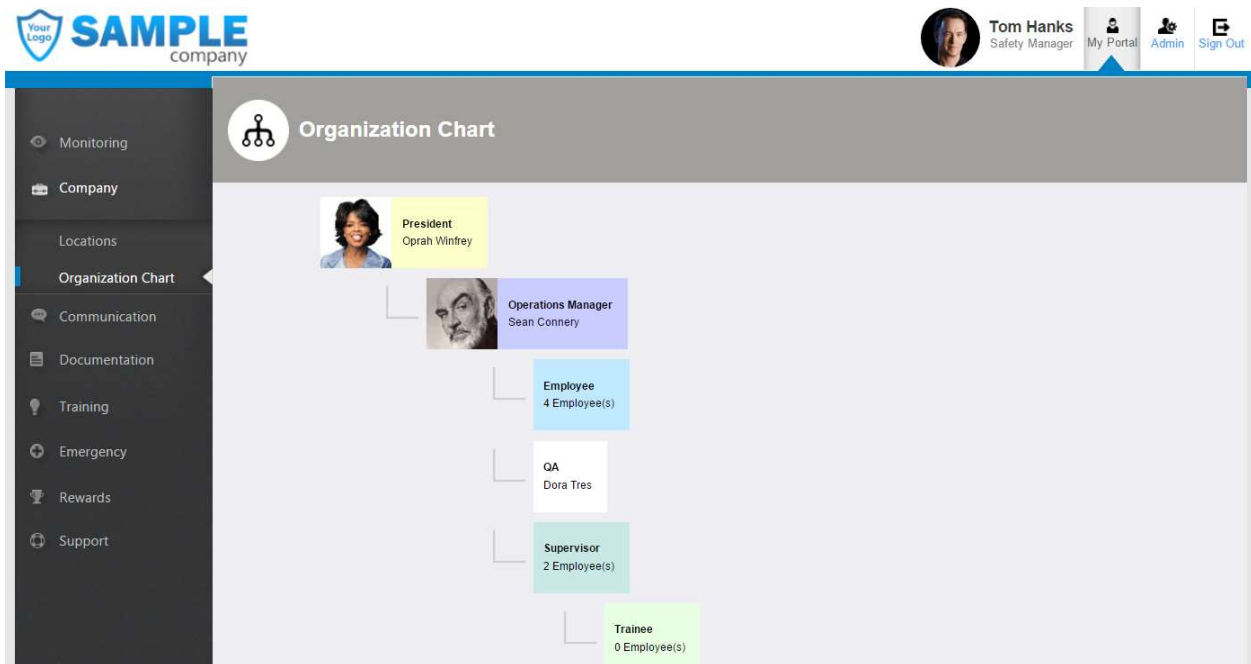
Please see two examples outlining the Organizational chart and how it will look once implemented.

This image (S.No.4) demonstrates what a populated Org Chart Looks like from the administrative view, once all the positions have been entered, color coded and assigned in a reporting structure.

Position	Job Description	Clone	Active Worker(s)	Portal Permissions		Average Compliance
				Worker	Administration	
President		Clone	Oprah Winfrey	Partial	Partial	8%
Operations Manager		Clone	Sean Connery	Partial	Partial	5%
Employee		Clone	4 Employee(s)	Partial	Partial	3%
QA		Clone	Dora Tres	Partial	Full	0%
Supervisor		Clone	2 Employee(s)	Full		4%
Trainee		Clone	0 Employee(s)	Partial	Partial	0%
Test		Clone	0 Employee(s)	Partial	Partial	0%
Plant Manager		Clone	0 Employee(s)	Partial		0%
Safety Manager		Clone	7 Employee(s)	Full	Full	8%

S.No.4

This image (S.No.5) demonstrates what the finished product of your organizational chart looks like once implemented, from the Employee view of the portal via ‘My Portal’.



S.No.5

Once navigating to [Admin > Company > Positions](#), choose 'Add Position'.

Ideally, when entering your Organizational Chart, you want to work from the Top – Down.

For example, you may want to begin with your most senior position – President. In this working example we would add 'President' to the 'Position Name' field.

Since the president is the most senior position, he does not report to anybody, so we would leave the second field as 'None'. You can choose to color code the job title if you like by choosing the eye-dropper on the 'Color on Organization Chart' field.

Save Changes

We will return to this page in **Part II : Assigning criteria post-setup** to demonstrate how to utilize the fields indicated in blue, which include: Courses, Certificates, Procedures, Active Workers and much more!

Course	N/A	Optional	Required	Lessons Selected	Training Time
Aboriginal Awareness	Select All	Select All	Select All	3	29 mins
All Terrain Vehicles (ATV) Awareness	Select All	Select All	Select All	7	45 mins
Basics of Baking	Select All	Select All	Select All	2	2 mins
Behavior Based Safety	Select All	Select All	Select All	1	11 mins
Commercial Vehicles	Select All	Select All	Select All	7	1 hr, 24 mins

S.No.6




- Once your most senior position exists, the rest are relatively easy to build on. The most important thing to keep in mind is that every new position you input after the initial, must report to another position in order for the org chart to display as you like. S.No.7 Example.



S.No.7

'Clone' Feature: There is a feature in the system where you can Clone a position simply by choosing the 'Clone' button. This will prompt you to provide a name for the new position. The **clone** feature allows you to create a copy of **all** of the requirements already assigned for an existing specific position. This means, all personnel for the pre-existing position as well as the cloned position will be required to review the identical policies, procedures and complete identical training courses/submit certificates. This is a great tool if multiple positions have the same requirements!

Please reference image S.No.32

Position	Job Description	Clone
President		Clone
L Operations Manager		Clone
L Employee		Clone
L QA		Clone
L Supervisor		Clone
L Trainee		Clone
L Test		Clone
L Plant Manager		Clone
L Safety Manager		Clone

S.No.32

Job Descriptions

Additionally, the small 'Paper' image appears beside positions that have had job descriptions added to it. If you hover over this image (2nd image outlined in Diagram S.No.32), the content entered will appear.

To Enter a job Description:

1. Select the position you would like to add a job description for, Example 'Operations Manager'.
2. In the Sub-Tab, select 'Job Description' to load the page as it appears in Sample Diagram S.No.33 Below.

Position Details

Export
Delete Position
Save Changes

Position Name:

Reports To:

Color on Organization Chart:

Limit Access by Location

Courses
Certificates
Policies
Procedures
Competencies
Surveys
Active Workers
Permissions
Job Description

Job Description (Including Safety Responsibilities)

Last updated by: Tom Hanks on 04-Feb-2016

NOTES: Job descriptions will appear in the Organizational Chart
Maximum length 8,000 characters (approx. 3 pages for text)

Tips for using text editor:
Always use 'Paste from Word' button to avoid unnecessary font faces and styles.
Consider viewing/editing html 'Source' when trying to troubleshoot style and formatting issues.

Source
B *I* U ~~S~~ ^{x₂} ^{x_n} *I_x*
Styles
Format
Font
Size
A-
A+

✂
📄
🔍
↶
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Please type your job descriptions here.

Sample duties include:

- Supervising the staff working in the warehouse
- End of day housekeeping
- Investigating Accidents/Incidents

Some other sample duties may include:

1.
2. #####
3. !!!!!!!!
4. Sample

S.No.33

In the text box, enter the corresponding Job Description (We also recommend adding Safety responsibilities to this section in order to communicate responsibilities with staff). When complete, 'Save Changes'.

Diagram S.No.34 demonstrates what this field appears like once 'Live' via the Administrative and Employee side of the SafetySync portal.

ADMINISTRATIVE VIEW

Position	Job Description	Clone	Active Worker(s)	Portal Permission
President		Clone	Oprah Winfrey	Partial
Operations Manager				Partial
Employee				
QA				
Supervisor				
Trainee				

Please type your job descriptions here.


Sample duties include:

- ?Supervising the staff working in the warehouse
- End of day housekeeping
- Investigating Accidents/Incidents

Some other sample duties may include:

-
- #####
- !!!!!!!
- Sample

EMPLOYEE VIEW



Operations Manager
Sean Connery

Operations Manager

Employee	Location	Job Description
Sean Connery	Head Office	<p>Please type your job descriptions here.</p> <p>Sample duties include:</p> <ul style="list-style-type: none"> ?Supervising the staff working in the warehouse End of day housekeeping Investigating Accidents/Incidents <p>Some other sample duties may include:</p> <ol style="list-style-type: none"> ##### !!!!!!! Sample

Diagram S.No.34

Step 4: Equipment

Before continuing on with your HSE Program content, we need to add to the foundation of 'building blocks' that support those features such as equipment/assets.


By Navigating to [Admin > Company > Equipment > 'Add Equipment'](#) you will be able to add Company Owned Equipment Including Vehicles, Rigs, ATV's, Respirators, Gas Monitors, Cranes etc. It's important to include your full list of equipment in an effort to utilize full functionality of the system.

Hint: Your Equipment List should be built keeping in mind your record keeping. For example, as a part of your safety program, if you collect and submit driver log records into the online system, you may want to add those Commercial Vehicles to the equipment list so those records can be associated with those specific units.

Equipment Details

[Save Changes](#)

Equipment Photo



No Image Found

[Choose File](#) No file chosen

Equipment Details

Equipment ID:

Description:

Category:

Year:

Make:

Model:

Vendor:

Serial Number:

License #:

Location:

In-Service Date:

Purchase Date:

Cost:

Active:

Notes:

250 characters remaining

S.No.12

From this page, you may add a Photo of the Equipment as well as other criteria. The more content you can include in this area, will assist with utilization of other features . Some of the most critical fields to have completed include:

- Equipment ID
- Location
- In-Service Date
- 'Active'.

One of the greatest benefits of the SafetySync system is that no data is ever lost (**Unless DELETED**). So if equipment is sold or taken out of service, you remove it from the active equipment list by DE-selecting the 'Active' Check box and Save Changes. This allows us to hide grandfathered data without losing it (associated records included).

Active:

Active:

[Save Changes](#)

S.No.13

Step 5: Forms & Records

Another great building block for a smooth running Health & Safety Program Includes Forms and Records.

Form Templates

By navigating to [Admin > Documentation > Forms > 'Add New'](#) we are able to add templates of forms you are currently using at your company (PDF, Excel, Word) thereby making the blank templates accessible for staff to access in order to complete a record.

Once choosing to add a new form, you will be presented with another feature: Add a blank form of your own by selecting 'Start from Blank Form', or upload a form you need (but may be lacking) from our editable templates as demonstrated Diagram S.No.14.

Select	Template Name	Date Added	View
<input type="checkbox"/>	Automobile Accident Report	-	View
<input type="checkbox"/>	Confidential Medical Release Form	-	View
<input type="checkbox"/>	Driver's Abstract Consent	-	View
<input type="checkbox"/>	Employer's Report of Injury or Disease	11-Jun-2009	View
<input type="checkbox"/>	First Aid Record - Excel	11-Jun-2009	View
<input type="checkbox"/>	First Aid Record - PDF	01-May-2013	View
<input type="checkbox"/>	Hazard Assessment - Excel	06-Dec-2010	View
<input type="checkbox"/>	Hazard ID Report - Excel	11-Jun-2009	View

Select the checkbox on the left for the form template you would like added. You can replace or modify the form after it has been added.

[Add Template Form\(s\)](#) [Cancel](#)

S.No.14

If you would like to upload your own PDF/Word/Excel/Link Document to the Form, choose 'Start from blank form'. This option will bring you to an area similar to in Image S.No.15. In this area, be sure to indicate:

- **Form Name:** Name of your form as you would like it to appear in the forms list.
- Selecting/Checking 'Active' means the form is valid and in use. As with other features, you may avoid deleting critical historical data by making old forms Inactive by de-selecting the 'active' box.

- Selecting ‘[Share Approved Records](#)’ Means those employees will be able to see the submitted records/data from ‘My Portal’ after they’ve been approved/reviewed/processed by a company administrator. While this is a great opportunity to share records for Safety Meeting minutes etc, it is also a good opportunity to ensure you aren’t sharing sensitive data with all staff (Like HR Files, Accident Investigations, Other forms, etc.)
- Selecting ‘[Share Unapproved Records](#)’ means that employees will be able to see the submitted records in ‘Raw’ stages, before an admin has processed or approved them.

Hint: This feature of sharing approved or unapproved records with staff does not allow an employee, without administrative permissions, to delete any data.

Form Details

S.No.15

PDF Forms

Under ‘**Select Format**’ (the yellow area identified in Diagram S.No.15) you can ‘**Choose File**’ to upload the PDF/Excel/Word Form file that you would like to upload. This functionality is best used for clients who prefer using paper forms and who prefers to submit those records into the system via Email or Fax.

Digital/Web Forms

Also under ‘**Select Format**’ you can select the secondary option ‘**Link to Web Form**’. This feature is beneficial for those clients who prefer to use DoForms, Google Forms or other Digital Forms Service for completing these records. When selecting the option, you will be able to input the ‘Web Form URL’ and **Save Changes**. The digital forms option removes the need to scan or email records into the system as these systems send the records in to your SafetySync portal automatically for you when properly implemented.

Should you require more information about digitizing forms into this Link to complete online or Mobile Form format, please feel free to contact one of our partners listed on our company webpage. Alternatively, you can contact a forms creator directly such as DoForms or another system you prefer.

Hint: An Administrator has the option to switch between the 'Web Form' Version of a form and the Attached version of the form depending on 1) which option is selected and B) Which you have available.

**It is also important to note the 'Share Approved/Unapproved Records' tab: This feature allows you to the option to share available records for a form with staff. You may want to utilize this feature for items such as Safety Meeting Minutes for example.

Assigning Frequency

Once your forms list has been created, and attachments or links input into SafetySync 'Forms', it is important to select Frequency. This will also help a great deal when it comes to reminding your Company Administrator of records that are coming due/past due for submission/record keeping. This will also allow for records associated with locations or equipment to be tied directly to units or facilities.

To assign Frequency, navigate to Admin > Documentation > Forms > Choose the form you'd like to use

- 'Location Frequency' Sub Tab:
 - How often do you want various locations submitting a completed record for this form? Depending on the frequencies you set, the status will indicate 'Coming Due', 'Past Due', 'Overdue', and 'Current'.

Settings / File Location Frequency Equipment Frequency Submitted Records [Delete Form](#) [Save Changes](#)

Specify the frequency at which staff at each location are expected to submit completed forms:

Location	Frequency	Most Recent Record Submitted	Status
Head Office	1 week(s) ▼	Never	Overdue
Packaging	2 month(s) ▼	Never	Overdue
Peace Country	1 year(s) ▼	Never	Overdue

NOTES: Forms will be flagged as 'Coming Due' when 3/4 of the frequency time has passed since the last record was submitted.

[Delete Form](#) [Save Changes](#)

S.No.16

- 'Equipment Frequency' Sub Tab:
 - How often do you want to see/receive records for various pieces of Equipment? Depending on the frequencies you set, the status will indicate 'Coming Due', 'Past Due', 'Overdue', and 'Current'.

Equipment ID	Description	Frequency	Most Recent Record Submitted	Status
001		3 month(s)		-
10221	CBA	3 month(s)		Past Due
123	Caterpillar D11	1 week(s)		Past Due
1234	Breath Alcohol Tester	2 day(s)		Past Due
1234	Final Product Metal Detector	1 day(s)		Past Due
435	45	1 year(s)		Past Due
MD01	Metal Detector	4 week(s)		Past Due

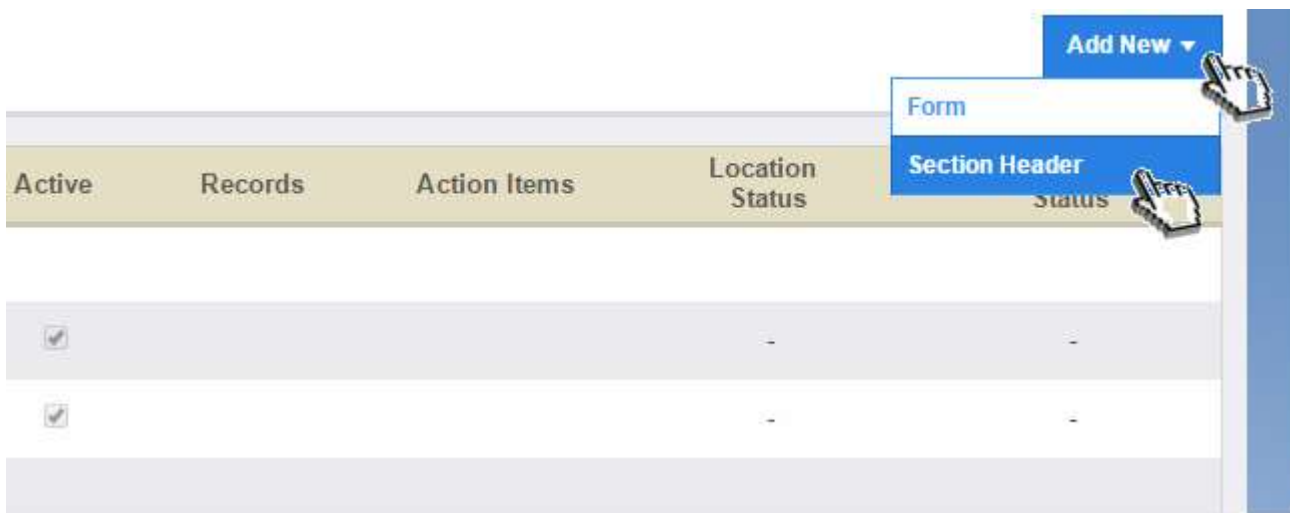
S No.17.

- **Example:** If you create a form place for ‘Commercial Vehicle Inspection Certificate’, you can date the record (when processing) for the completion date of inspection. Then, set the equipment frequency so that you will be effectively notified when that CVIC is coming due for that specific piece of equipment.

Hint: It is recommended that your frequencies match what is written in your company Policies. For example: If your **Equipment Preventative Maintenance Policy** states that we will perform service on our equipment every 3 months, the frequency for that piece of equipment and its associated form(s) should be assigned accordingly.

Form Headers

When adding forms, it is recommended to include ‘Section Headers’ which will help organize your list of forms into sections. To add a section header, Navigate to **Admin > Forms > Add New > Section Header** as outlined in Diagram S.No.35.



S.No.35

When your page loads, you will be required to enter a ‘Section Header Name’. For Example, ‘Inspections’ as outlined in Diagram S.No.36. Followed by **‘Save Changes’**.

Form Section Header

Form Header

Section Header Name:

S.No.36

Once your header is saved head to the form's details page that you want to place under the header. In the settings tab you'll find the Header drop down list which will be populated with the various headers you have created. Choose the appropriate one for your form and save your changes. Forms will appear alphabetically under the associated header.

Next, Navigate back to [Admin > Documentation > Forms](#).

After your form space is created, you may select the header from the following page. For example, on a Rig Inspection form, the form header '**Inspections**' is now an available option under the '**Form Header**' drop-down menu as demonstrated in Diagram S.No.37. [Save Changes](#).

Form Details

[Settings / File](#) [Location Frequency](#) [Equipment Frequency](#) [Submitted Records](#)

Form Name:

Active: *'Inactive' forms will not be available to users in the Employee Portal*

Form Header:

Share Approved Records: *Selecting this option will make all records visible in the Employee Portal to users with permission to view records*

Share Unapproved Records: *Selecting this option will make all unapproved records available regardless of who submitted them.*

Form Summary: *(what information it contains, when it should be filled in, special instructions, etc.)*

Select Format: Upload Document
(.doc, .xls, .pdf, etc.)

Link to Web Form
(Google Forms, Adobe FormsCentral, etc.)

Existing File:



0.25MB

[View Current File](#)

S.No.37

For demonstration purposes, multiple forms have been added to the 'Inspections' Form Header. Diagram S.No.38 demonstrates the appearance of the forms/form headers as it appears from the employee view of the portal.



S.No.38

Processing Records

- When processing records, be sure to include:
 - The 'Date' as the Date the record was completed
 - Identify the Name of the person who completed the record
 - Job # / Other
 - Identify Location
 - Critical: Identify Equipment*
 - Critical: Identify Incident if there is one
 - Add action items where appropriate.
- This area will be discussed in further detail in **Part II**.

Step 6: Policies

Health and Safety Policies are an integral part of your company Health and Safety Program. Once input and assigned correctly, you can extract compliance reports for employees who have reviewed the content, set time limits for how long the policy should be reviewed, add signing authority etc. all of which will be reviewed throughout this step.

Policy Addition

To Input your first policy (for example: Health, Safety and Environment Policy Statement) navigate to [Admin > Documentation > Policies > 'Add New - Policy'](#) (Image S.No.8) SafetySync will provide a list of templates you can modify to fit your company, or you can ['Start from Scratch'](#) and upload your existing content.

Policy List Export ▾ Add New ▾

Section	Policy Name	Last Reviewed	Active	Positions		Declines	Compliance
				Required	Optional		
A	Management Involvement & Commitment						
A.01	Health, Safety and Environment Policy Statement	12-Feb-2016	<input checked="" type="checkbox"/>	2	0		<div style="width: 0%;">0%</div>
B	Hazard Identification and Risk Control						
B.01				2	0		<div style="width: 9%;">9%</div>
C.01.02				2	0		<div style="width: 9%;">9%</div>

Add New Policy

You can either enter/upload a new policy from scratch

[Start from Scratch](#)

or modify an existing template...

Select	Section	Policy Name	Added
<input type="checkbox"/>	COR.A	Management Involvement and Commitment	-
<input type="checkbox"/>	COR.A.1	Health, Safety and Environment Policy Statement	11/11/2015
<input type="checkbox"/>	COR.A.2	Industry Guiding Principles	-
<input type="checkbox"/>	COR.A.3	Health and Safety Responsibilities	-
<input type="checkbox"/>	COR.A.4	Management Communication	-
<input type="checkbox"/>	COR.B	Hazard Identification and Risk Control	-
<input type="checkbox"/>	COR.B.1	Hazard Identification and Control	11/11/2015

You can change the policy name, and add, remove or modify the statement after adding the policy.

[Create Policy from Selected Template](#)

S.No.8

Whether you choose the policy from a selected template, or whether you start from scratch, your next loaded page will look similar to the sample below (S.No.9).

Important Information on Section Numbering

- Section numbers will determine the sort order in the procedure list
- Please include a "0" in front of single integers to ensure the alphanumeric numbering system is consistent (i.e. 02.08, NOT 2.8)
- Placing periods in section number will determine formatting and indentation :

Sections with no periods (such as A or 01) will be bold, underlined and large font.

Sections with 1 period (such as A.01 or 01.A) will be bold font and indented.

Sections with 2 or more periods (such as A.01.a or 01.A.01) will be regular font and double indented

Name:

Section: (10 characters remaining)

Active:

Version:

Version Date:

Initial notes / policy source: (284 characters remaining)

Enter new policy

Select Format: Enter Policy Statement Upload PDF Document

Section Header Only
(Cannot be opened/Viewed, used only for organizing / grouping policies)

Policy Statement
(Allows entry or upload of policy statement, can be assigned to positions for acknowledgement)

Policy Statement:



S.No.9

This document will act similar to a word document – providing the functionality of formatting your text to Bold/Italic/Font Changes, Bullet Points, Indentation/Centering and much more.

- **Name:** your policy title
- **Section:** Depending on the alpha-numeric ID you choose for your Policy (COR.A.1 for example) it will fall into sequence in the policy list. You can change the 'Section' ID for your policy at any time (Under 'Settings') after initial saving is complete.
- **Version:** Default version for a new policy is '1.0' but this can be changed to meet the actual version on your written copies. The system will retain all previous versions of policies and will re-number new revisions based on their updates. This will be discussed later in this step – see '**Policy Changes**' section for guideline.
- **Version Date:** This can be modified in order to back-date your policy if required.
- **Select Format:** SafetySync allows you to upload one of 2 versions of your policy. Either in an open-text format that only Company Administration can access by using the 'Enter Policy Statement' option OR by using the 'Upload PDF Document' option.
 - Note: it is important to recognize that the recommended option in this instance is to input the Policy Statement as Text since it allows for ease of policy amendments and allows us to add the signature via (Settings) – see '**Policy Changes**' section for guideline.
 - Additionally, inputting your Policies as Text format will allow use of the ESL Feature which is described in Part II: Adding Workers.

- If you have chosen a sample from a template, be sure to remove the RED TEXT that will appear on the top of the document (*'Note to Sample Company policy review committee or individual'*) when performing additional policy edits.

****Before navigating away from pages you are working in or modifying, remember to 'Save Changes' so that none of your information is lost.***

Policy Changes

You may update your policy and policy compliance at any given time simply by uploading your new version and 'Save as New Version' Where you will be provided 3 options, as indicated in image S.No.10.

The screenshot shows a 'New Policy Version Details' dialog box. At the top, there are radio buttons for 'Enter Policy Statement' (selected) and 'Upload PDF Document'. Below that is a 'Statement:' field. The dialog title is 'New Policy Version Details'. It contains a 'Revision Date:' field with the value '19-Feb-2016' and a calendar icon. Under 'Version Type:', there are three radio button options: 'No Change (Version 1.1)' with sub-points 'Period Review' and 'Reset review timeclock'; 'Minor change (Version 1.1)' with sub-point 'Tweaks to grammar, spelling, etc.'; and 'Major change (Version 2.0)' with sub-points 'Fundamental changes to policy' and 'Requires new acknowledgement'. The 'Minor change' option is selected. Below this is a text area for 'Reason for Change/Modifications: (300 characters remaining)'. At the bottom right are 'Cancel' and 'Save' buttons.

S.No.10

Version Type:

- **No Change:** re-sets the date on the document and demonstrates it has been renewed. This does not affect the positive compliance for those staff who have already reviewed the document.
- **Minor Change:** If chosen, changes your version to an amended version (1.1 in this example). This does not affect positive compliance for personnel who have previously reviewed. Also renews the date of the policy.
- **Major Change:** If this option is chosen, it will generate a brand new version (2.0 in this example) and will RESET the compliance for staff who have reviewed it
- **Save.**

*It is highly recommended that you enter a reason for change modifications into the blank space available in this area as it will explain what changes were made to the version(s) and why. Up to 300 characters Maximum are allowed.

Additional Policy Settings:

There are many other features available to add to your new policy as well. These include assigning to people for review and much more!

Section	Title	Current Version	Last Reviewed	Updated By	Active
C.01.02	Workplace Violence Policy	1.0	11-Nov-2015	Tom Hanks	<input checked="" type="checkbox"/>

Policy Details Policy PDF Delete Policy

[View / Edit Current Version](#) [Settings](#) [Prior Versions](#) [Positions](#) [Employee Compliance](#) [Related Materials](#) [Comments](#)

Entry Type: Section Header (Cannot be opened/viewed, used only for organizing / grouping policies) Policy Statement (Allows entry or upload of policy statement, can be assigned to positions for acknowledgement)

Section Number: (3 characters remaining)

Add Signing Authority: ?

Date Signed:

Active: ?

Study Time: How long must employees study this policy before they have the option to acknowledge or decline?

Default (10 seconds) Immediate 10 seconds 20 seconds 30 seconds 1 minute 2 minutes 3 minutes 5 minutes 10 minutes 20 minutes 30 minutes

Contact Person: Tom Hanks

Important Information on Section Numbering

- Section numbers will determine the sort order in the procedure list.
- Please include a "0" in front of single integers to ensure the alphanumeric numbering system is consistent (i.e. 02.08, NOT 2.8)
- Placing periods in section number will determine formatting and indentation:
 - Sections with no periods (such as A or 01) will be bold, underlined and large font.**
 - Sections with 1 period (such as A.01 or 01.A) will be bold font and indented.**
 - Sections with 2 or more periods (such as A.01.a or 01.A.01) will be regular font and double indented

S.No.11

- **'Settings' Sub-Tab:**

- **Section Number:** This section allows you to change the section number of the policy to change the order in which the policy is displayed in the [Admin > Documentation > Policies](#) list.
- **Add Signing Authority:** This attaches the signature we have uploaded earlier on from the company profile, to appear on the signed document. Select this option to attach the signature. Leave the field unchecked if you would like the document to be published without a signature.
- **Date Signed:** A date shouldn't be chosen assigned unless the 'Add Signing Authority' has been activated ('Checked').
- **Active:** This box must be selected or 'Checked' in order for the policy to become 'Live'.
- **Study Time:** Study time can be adjusted based on the importance or length of the document. This is the amount of time that must pass before the employee can choose to accept or decline the policy – a time which is used to review the content therein.
- **Contact Person:** This name defaults to the person who created the policy, but should be assigned to the person with permissions to change a policy (Like an administrator, Safety Personnel, Document Control or Other). If future staff 'Decline' a policy, this contact person will be notified when the decline occurred and why it was declined.

*Note: You can 'Turn off' or 'Deactivate' a policy at any time without deleting/losing the content by simply de-selecting the 'Active' box under Settings for the associated policy. This will prevent new reviews of the policy without losing the old content and old compliance. Administrators will see the inactive policy but employees won't see it via 'My Portal'.

- **'Prior Versions' Sub Tab:**

- Allows access to previous versions of a Policy and includes reasons for version changes
- **'Positions' Sub Tab:**
 - This will only be populated if your organizational chart has been added under 'Positions' first. From this area, you can select which positions you want N/A, Optional or Required to review the policy. Choosing 'Required' will affect the personnel compliance until the policy is reviewed.
- **'Employee Compliance' Sub Tab:**
 - This tab will only be populated once employees have begun review. If you want to see compliance for this policy having been reviewed select 'Search' (leaving all filters blank). You will see who is, and who is not compliant as well as the date they became compliant.
 - Another feature in this section is to choose 'Acknowledge' to recognize review of the policy on behalf of staff. This is not recommended, for legal purposes, unless you have written signed documentation from the employee stating that they have accepted the document(s). It is recommended to increase compliance via staff logging into the online system directly.
- **'Related Materials' Sub Tab:**
 - In this section you may link Forms associated with Policies. For example, you may want to link your Job Hazard Analysis Form to your Formal Hazard Assessment Policy. On this page, when you choose **'Add Related form'** you will be presented with a screen that allows you to select and save forms, as in diagram S.No.22. This allows forms to be accessible to employees directly from the relevant Policy.

Employer's Report of Injury or Disease	<input type="checkbox"/>
First Aid Record - PDF	<input checked="" type="checkbox"/>
Food Recall	<input type="checkbox"/>
Hazard Assessment	<input type="checkbox"/>
Hazard ID Report	<input type="checkbox"/>
Incident Investigation Report - Excel	<input checked="" type="checkbox"/>
MASTER LIST	<input type="checkbox"/>
Metal Detector Inspection Form	<input type="checkbox"/>
Monthly Calibration Check	<input type="checkbox"/>
Near Miss Form	<input checked="" type="checkbox"/>
Rig Inspection Form	<input type="checkbox"/>

S.No.22

- **'Comments' Sub Tab:**
 - This page will display all feedback comments made on the individual policies.

Policy Header

Similar to that of Forms, Policies may be organized or grouped by Section headings as well. To add a header to Policies, Navigate to [Admin > Documentation > Policies > Add New > Section Header](#) as outlined in Diagram S.No.39.



S.No.39

The next page loaded will appear something like that in Diagram S.No.40. You must indicate your section number as well as the header you would like other documents placed under.

HINT: No documents may be uploaded under a section header as this feature is primarily used for organizational and layout purposes.

For the Section Header Number (Under 'Section'), If a whole number is entered (example: 1) the header will appear Underlined and Bolded within the policies page. If a decimal number is entered here (example: 1.00) the header will not appear underlined or will not appear as clear a divider between sections.

Add Policy

Save

Important Information on Section Numbering

- Section numbers will determine the sort order in the procedure list
- Please include a "0" in front of single integers to ensure the alphanumeric numbering system is consistent (i.e. 02.08, NOT 2.8)
- Placing periods in section number will determine formatting and indentation :

Sections with no periods (such as A or 01) will be bold, underlined and large font.
Sections with 1 period (such as A.01 or 01.A) will be bold font and indented.
Sections with 2 or more periods (such as A.01.a or 01.A.01) will be regular font and double indented

Name:

Section: (6 characters remaining)

Section Header Only
(Cannot be opened/Viewed, used only for organizing / grouping policies)

Policy Statement
(Allows entry or upload of policy statement, can be assigned to positions for acknowledgement)

S.No.40

Save Changes

Section ▾	Policy Name
1	<u>Health & Safety Example Header</u>
1.01	Health, Safety and Environment Policy
1.02	Health & Safety Responsibilities for Management
1.03	Health & Safety Responsibilities for Supervisors
1.04	Health & Safety Responsibilities for Workers
1.05	Health & Safety Responsibilities for Sub-Contractors
1.06	Health & Safety Responsibilities for Visitors
A	<u>Management Involvement & Commitment</u>
A.01	Health, Safety and Environment Policy Statement
B	<u>Hazard Identification</u>
B.01	Hazard Identification and Control
C.01.02	Workplace Violence Policy

S.No.41

Diagram S.No.41 outlines what the final result should appear like once headings are added. In this example, headers are '1 Health & Safety Example Header', 'A Management Involvement & Commitment' as well as 'B Hazard Identification'.

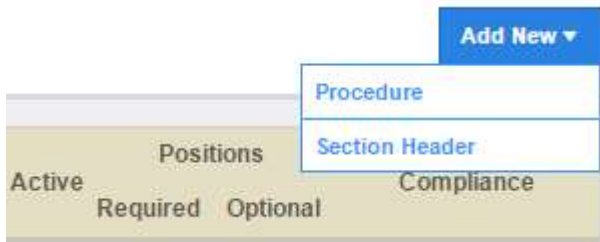
Step 5: Procedures

Safe Work Procedures are also a valuable asset to any Health and Safety Program. This section may be used to upload any of your preferred Safe Work Procedures, Formal Hazard Assessments, Emergency Procedures and any other relevant subject matter.

Note: at this time, procedures may only be uploaded as **PDF** OR as a **YouTube Video**, with future plans for additional available formats.

Uploading:

On the top right hand side of your page you must choose '**Add New**', after which you will choose '**Procedure**' or '**Section Header**' (Section headers help to organize headings for your procedure sections). To add a new procedure, choose '**Procedure**'.



S.No.18

On your next page, you will be required to enter in a section number – which determines where this procedure will be placed in your Health and Safety Procedures list upon saving. S.No.19.

Procedure Name text may be entered. The system will automatically set this procedure as version 1.0 (as displayed in example S.No.19) unless changed by the user. *For example, the hard copy procedure you are entering may be Rev.10. Version 10.0 may be entered in the text box in this instance - and as always, Save changes!*

Important Information on Section Numbering

- Section numbers will determine the sort order in the procedure list
- Please include a "0" in front of single integers to ensure the alphanumeric numbering system is consistent (i.e. 02.08, NOT 2.8)
- Placing periods in section number will determine formatting and indentation :

Sections with no periods (such as A or 01) will be bold, underlined and large font.

Sections with 1 period (such as A.01 or 01.A) will be bold font and indented.

Sections with 2 or more periods (such as A.01.a or 01.A.01) will be regular font and double indented

Section Header Details

Section Number:

(10 characters remaining)

Procedure Name:

Version: .

After creating the procedure (by clicking "Save"), you will have the ability to upload a document, attach a video, assign to positions and specify other settings.

A	<u>Completions & Workovers</u>
A.01	Acidizing
A.02	Cementing
A.03	Cutting and Removing Corrod
A.04	Downhole Abandonment
A.05	Fracturing
A.06	Installing Tubing Hangers

S.No.19

Upon saving, your page will appear similar to S.No.20 where we have added functionality.

The screenshot shows a web interface for managing procedure details. At the top, there is a 'Procedure Details' header and a 'Delete Procedure' button. Below this is a green notification bar stating 'Procedure created successfully. Next step: upload a PDF or link to an unlisted YouTube video, then assign it to positions.' A table lists procedure versions with columns for Number, Title, Current Version, Last Reviewed, Updated By, and Active. Below the table are navigation tabs: View / Edit Current Version, Settings, Prior Versions, Job Hazard Analysis, Positions, Employee Compliance, and Related Materials. The main form area contains a 'Procedure Name' field with 'Sample Procedure', a 'Select Format' section with radio buttons for 'Upload PDF Document' (selected) and 'Link to Unlisted YouTube video**', and a 'Procedure PDF File' section with a 'Browse...' button and a note 'No file selected. Maximum file size is 10 MB'. A 'Save As New Version' button is located at the bottom right of the form.

Number	Title	Current Version	Last Reviewed	Updated By	Active
1.00	Sample Procedure	10.0	26-Feb-2016	Tom Hanks	<input type="checkbox"/>

S.No.20

As previously mentioned, you may choose your format :

- Choose '**Upload PDF Document**' and utilize the 'Browse' button to choose your PDF to upload from your computer. **NOTE: The larger the PDF file is, the longer it will take to load on the employee side of the portal.**
- Otherwise, choose '**Link to Unlisted YouTube video**':
 - Hint: If you will be linking to a YouTube video, you will require a free YouTube account for your organization ([learn more](#)) . It is recommended that you upload your video to YouTube as "Unlisted" to prevent searching and viewing by the public ([learn more](#))
 - **Make a note of the video ID (12 digit string after v= in the URL under Sharing options (e.g. TdoAYC1EGJ8) to be entered into 'YouTube Video ID'.**

Save as New Version once upload is complete / once video ID is input.

Assignment

- **Settings** Sub Tab
 - Here you can change the Procedure Section Number, Make the Procedure 'Active' or 'Inactive' depending on whether or not the '**Active**' box is selected, Change the Study time and Change the contact person for this procedure.
 - Hint: you may want to ensure your contact person is holding a longstanding company position so that during turnover, the contact person would not require change.
- **Prior Versions** Sub Tab
 - You always have access to any previously uploaded versions which may be exported.
- **Job Hazard Analysis** Sub Tab
 - Discussed in-depth in **Part II**
- **Positions** Sub Tab
 - Select the positions you want '**N/A**', '**Optional**' and '**Required**' to review the associated procedure.

- Optional: You may choose the exposure frequency in this section if you plan to use the SafetySync Job Hazard Analysis tool .
- **Employee Compliance Sub Tab**
 - You may simply choose **'Search'** to display all results, or set filters. You may also **'Export'** your data as PDF or Excel.

The screenshot shows a search and filter interface with the following elements:

- Name Contains:** A text input field.
- Position:** A dropdown menu with "(all)" selected.
- Location:** A dropdown menu with "(all)" selected.
- Compliance Requirement:** A dropdown menu with "(all)" selected.
- Compliant:** A dropdown menu with "(all)" selected.
- Buttons:** "Reset Filters", "Search", and "Export" (with a dropdown arrow).

S.No.21

- **Related Materials Sub Tab**
 - In this section you may links Forms associated with Procedures. For example, you may want to link your Incident Report form to an Emergency Preparedness Procedure. On this page, when you choose **'Add Related form'** you will be presented with a screen that allows you to select and save forms, as in diagram S.No.22. This allows forms to be accessible to employees directly from the relevant Procedure.

The screenshot shows a form selection dialog box with the following items:

Form Name	Selected
Employer's Report of Injury or Disease	<input type="checkbox"/>
First Aid Record - PDF	<input checked="" type="checkbox"/>
Food Recall	<input type="checkbox"/>
Hazard Assessment	<input type="checkbox"/>
Hazard ID Report	<input type="checkbox"/>
Incident Investigation Report - Excel	<input checked="" type="checkbox"/>
MASTER LIST	<input type="checkbox"/>
Metal Detector Inspection Form	<input type="checkbox"/>
Monthly Calibration Check	<input type="checkbox"/>
Near Miss Form	<input checked="" type="checkbox"/>
Rig Inspection Form	<input type="checkbox"/>

Buttons: "Cancel" and "Save" (highlighted in green).

S.No.22

Procedure Headers

Similar to that of Forms and Policies, Procedures may be organized or grouped by Section headings as well. To add a header to Policies, Navigate to **Admin > Training > Procedures > Add New > Section Header** as outlined in Diagram S.No.42.

Last Reviewed	Active	Positions		Compliance
		Required	Optional	
09-May-2011	<input checked="" type="checkbox"/>	3	0	9%
19-Nov-2010	<input checked="" type="checkbox"/>	5	0	0%

S.No.42

The next page loaded will appear something like that in Diagram S.No.43. You must indicate your section number as well as the section header text you would like other documents placed under.

HINT: No documents may be uploaded under a section header as this feature is primarily used for organizational and layout purposes only.

For the Section Header Number (Under 'Section Number'), If a whole number is entered (example: 1) the header will appear Underlined and Bolded within the policies page. If a decimal number is entered here (example: 1.00) the header will not appear underlined or will not appear as clear a divider between sections.

Add Safe Work Procedure

Cancel

Important Information on Section Numbering

- Section numbers will determine the sort order in the procedure list
- Please include a "0" in front of single integers to ensure the alphanumeric numbering system is consistent (i.e. 02.08, NOT 2.8)
- Placing periods in section number will determine formatting and indentation :

Sections with no periods (such as A or 01) will be bold, underlined and large font.
 Sections with 1 period (such as A.01 or 01.A) will be bold font and indented.
 Sections with 2 or more periods (such as A.01.a or 01.A.01) will be regular font and double indented

Section Header Details

Section Number:

(6 characters remaining)

Section Header:

Version:

S.No.43

Save Changes. ****To Activate the section header, after saving, navigate to 'Settings'. Select 'Active' and [Save Changes to Settings](#) again.**

5	<u>Emergency Response Procedures</u>
5.01	Floor Plan for Alberta Warehouse
5.01.1	Aerial view of Alberta shop with Muster Point Identification
5.02	Fire Evacuation Procedures
5.03	Natural Disaster

S.No.44

Diagram S.No.44 outlines what the final result should appear like once headings are added.

HINT: Procedure Section Numbering must be assigned appropriately in order for the procedures to appear beneath their heading (example 5.01 must be entered for the 1st Procedure in order to fall beneath section 5 – Emergency Response Procedures). Your procedures must also appear as ‘Active’ (Under ‘Settings’ for the procedure) before it will be ‘Live’ and viewable from the Employee side of the SafetySync Portal.

Step 6: Certificates

Navigate to [Admin > Training > Certificate Tracking > Add Certificate Category](#).

In addition to completing courses online via SafetySync, our ‘**Certificate Tracking**’ tool allows you to upload certificates pertinent to your workers positions. You may utilize this feature to upload any type of certificate, including but not limited to: H2S, Drivers Licenses, Drivers Abstracts, First Aid, Journeyman Certification etc.

From these steps, you will be provided the option to choose an EXISTING certificate category, OR Choose ‘**Other**’ (Last Option) & [Continue](#) in order to create your own category.

Certificate Category / Name: Default = * Other

Default Expiry: Months *Note: If a certificate never expires, leave this field blank*

Applies to: Employees Contractors

COMMENDED TRAINING PROVIDER: Optional - employees can use this information to contact providers and schedule their own training

Institution Name:

Phone #:

Website URL:

Blanket Purchase Order #:

Special Instructions:

500 characters remaining

Share Info with Employees

S.No.23

If you did choose 'Other' we recommend you change the 'Certificate Category / Name' to the name of your certificate or ticket. Set the default expiry that you may want your certificate to expire (i.e. 36 Months = 3 Year Expiry) and whether or not the certificate applies to Employees and/or Contractors.

'RECOMMENDED TRAINING PROVIDER: Optional - employees can use this information to contact providers and schedule their own training'. In order to activate this section, select the check box for 'Share Info with Employees'.

- **Positions:**
 - Select **N/A, Optional or Required** for Positions.
- **Employee Compliance:**
 - Search and/or use filters to pull up your relevant information demonstrating compliance with certificates. These compliance reports may be exported via PDF or Excel. These reports are only valid at time of printing since new certificates may be input/approved afterwards.

* There are two ways in which to upload certificates within the online system: Via the Administrative side and also via the employee side. These elements will be discussed further within this section.

Admin Uploading:

1. For an administrator to upload certificates on behalf of an employee, simply navigate to [Admin > Training > Certificate tracking](#). From here, select the specific certificate you would like to upload (for demonstration purposes Drivers License was selected).

Positions Employee Compliance

Name Contains Position Location Compliance Compliant

(all) (all) (all) (all) [Reset Filters](#) [Search](#)

Last Name	First Name	Middle	Position	Location	Compliance	Compliant
Carrey	Jim		Employee	Packaging	Required	No
Connery	Sean		Operations Manager	Head Office	Required	No
Foster	Jodie		Supervisor	Peace Country	Required	No
Gaheer	Meenakshi		Safety Manager	Head Office	Required	No
Hanks	Tom		Safety Manager	Head Office	Required	No
Johnson	Charles		Safety Manager	Head Office	Required	No

S.No.45

- Next, select the employee name for whose certificate you'd like to upload. In this example, Charles Johnson was chosen as per diagram S.No.45. We can see this certificate is required for his position but that he is not yet compliant.
- Next we will see a page similar to that of S.No.46 diagram.

Certificate: **Driver's License**
Employee: **Charles Johnson**
Status: **No certificate has been entered**

[Click a button or certificate on left panel](#)

[Schedule Training Session](#)
[Enter Completed Certificate](#)
[View Online Certificate](#)

S.No.46

- From here, choose 'Enter Completed Certificate'. Next, utilize the 'Browse' button to upload a copy of the certificate. From here, **you must enter the issue and expiry date for the certificate** as well as any additional criteria. Once 'Saved' the certificate should be approved by management to ensure validity. Alternatively, you may choose 'Approve & Save'. See diagram S.No.47 below.

Note: When the certificates are entered with their expiration dates, they are flagged as **Current** (Up to date), **Coming Due** or **Past Due** on the users dashboard. Notifications may also be received via email for the employee and their supervisor depending on whether or not this component is active. You would utilize this function to track your workers compliance with reference to valid certificates.

Status : *Enter New Certificate*

Course Name / Cert Level :

Endorsement(s) :

Course Provider / Institution :

Instructor Name :

Certificate # :

Cost (\$) :

Special Instructions :

200 characters remaining

Issue Date :

Expiry Date :

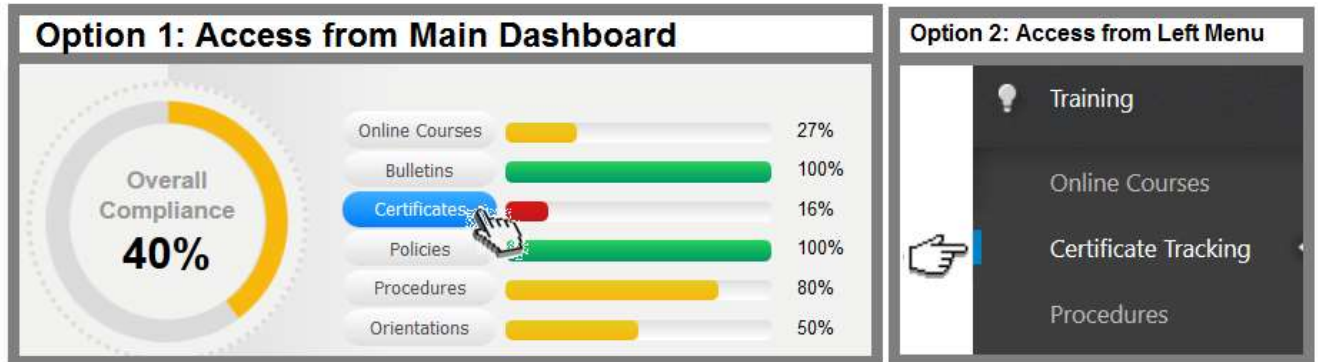
Upload image file : No file selected.

S.No.47

Employee Uploading


Another great feature of the system, is that Employees can upload their own certificates if provided the appropriate permissions. To upload a certificate from 'My Portal' as an employee, please complete the following steps:

1. Navigate to 'My Portal' (main login page once signed in)
2. Diagram S.No.48 identifies 2 ways in which an employee may access and update their certificates



S.No.48

3. Once your next page loads, you will be required to select the specific certificate from the list that you'd like to upload.
4. Whether you had a pre-existing (expired) certificate in this section, or no other certificate was ever uploaded,

you will need to choose  in order to effectively attach your certificate.

The screenshot shows the 'Driver's License' upload form. It includes a table with columns for Name, Certificate Number, IssueDate, and Expiry Date. The 'Name' field contains 'Driver's License' and the 'IssueDate' is '16-Mar-2016'. Below the table is a large blue dashed box for file upload with the text 'Drag the file here' and a 'Browse Computer' button. To the right of the upload area are input fields for 'Endorsement:', 'Instructor Name:', 'Course Provider:', and 'Note:'. A 'Save' button is located at the bottom right of the form.

S.No.49

5. As displayed in Diagram S.No.49 You must choose 'Browse Computer' or drag-and-drop your certificate into the appropriate area along with additional information including Endorsements, expiry/issue date, instructor

information etc. Choose  once complete.

Step 7: Training Courses

Assignment

Navigate to [Admin > Training > Online Courses](#) to view our constantly growing available course list. If you don't see a course here you would like, use '[Search Topics](#)' on the top of the page to search phrases to find content similar to your criteria to identify the course you may be looking for. Diagram S.No.24.

Search for courses and lessons on the following training topic: <input type="text" value="Safety Committee"/>			<input type="button" value="Search"/>
Course	Lesson	Topics	
Safety Supervision		Joint Health and Safety Committee	

S.No.24

- To assign a course as *Optional* or **Required** for positions, navigate to '[Online Courses](#)':
 - Choose your [Course Name](#)
 - Choose the Sub-Tab '[Positions](#)'
 - Use bubbles to indicate N/A, Optional, Required & [Save Changes](#).
- **Settings under Course:**
 - This settings page lets you choose criteria aside from the default. Here, you can choose when the course will expire, Set your minimum quiz pass score, and many more options specific for this course. This criterion is expanded upon in **Part I: Components**.
- **Employee Compliance:**
 - You may use this search tool to set filters or do a generic search to determine who has or has not yet completed the course as well as the completion date(s).

Modules

Modules act sort of like 'Chapters' for each course. Each course may have 1 module or multiple modules depending on the content. Additionally, in some cases you may choose different available versions of a module if you are unsatisfied with the default version provided.

Take the steps below to ensure you have the most preferred module content selected and available for viewing by personnel.

1. **Navigate into any course** (For example purposes, the 'Confined Spaces' course will be used)
2. **Choose a module** for that course by selecting the module (For example purposes the 'Confined Space Awareness' module will be used).
3. Next you will be taken to a page that looks like the one displayed in S.No.25 with options at the top including '[Lecture Versions](#)'.



Course Name: Confined Spaces

Lesson Name: **Confined Space Awareness**

Instructor:

Denise



[Lecture Versions](#) [Quiz Questions](#) [Feedback](#) [Lesson Source](#)

Version	Training Time	Last Updated	Screenshots	Preview	Selected
MSHA	10 mins	15-Sep-2011	View	Preview	<input type="radio"/>
SafetySync V1.1	6 mins	16-May-2008	View	Preview	<input checked="" type="radio"/>
US Chemical Safety Board	16 mins	19-May-2011	View	Preview	<input type="radio"/>
Worksafe BC	13 mins	27-Jul-2009	View	Preview	<input type="radio"/>

S.No.25

From here, you may **'View'** (if available) or **'Preview'** the course to determine the version you prefer best. The 'Version' text explains the source of where the content came from. You may use the bubble to select a different version of the specific module for the course & **Save Changes**.

Quiz'

Still within the same Page for your specified module (Example: Confined Space Awareness > Quiz Questions), select the Sub-Tab **'Quiz Questions'**.

Many times employees who utilize SafetySync complain that questions may not be challenging enough. This is a problem that is easily resolved via the 'Quiz Questions' tab. This tab is specific to the module/chapter for the course you have chosen. By default, SafetySync chooses certain questions to be asked on the associated Quiz'.

[Lecture Versions](#) [Quiz Questions](#) [Feedback](#) [Lesson Source](#)

Note: Depending on the lecture version you choose, the answers for certain questions may or may not be covered in the lesson. Please review the lecture versions and select the appropriate quiz questions accordingly.

Question	Difficulty	Preview	Select All Selected
What qualifies an area to be considered a "confined space"?	MODERATE	Preview	<input checked="" type="checkbox"/>
Which of the following would NOT be considered a "confined space"?	EASY	Preview	<input checked="" type="checkbox"/>
What is the term for when another gas has displaced oxygen below 18%, causing a risk of asphyxiation?	MODERATE	Preview	<input checked="" type="checkbox"/>
True or False? If the air in a confined space contains less than 12 percent oxygen, then an exposed worker may lose consciousness, and will likely die unless removed to fresh air.	EASY	Preview	<input checked="" type="checkbox"/>
At what concentrations will hydrocarbons cause a potentially explosive atmosphere?	HARD	Preview	<input checked="" type="checkbox"/>
Which of the following physical hazards could possibly exist in confined spaces?	EASY	Preview	<input checked="" type="checkbox"/>
True or False? Operations in confined spaces are often complicated by poor visibility.	EASY	Preview	<input checked="" type="checkbox"/>
		Total :	7

[Print Blank Quiz](#)

[Print Answer Key](#)

[Enter Class Results](#)

S.No.26

From Quiz Questions, you may Select or De-Select appropriate questions (Only accessible to Administrator).

These quiz questions are rated as **Easy**, **Moderate** or **Hard** based on the number of Correct or Incorrect responses chosen on average for all SafetySync users which may assist with assignment of questions. **'Save Changes'**.

- **Feedback Sub Tab**
 - This page outlines general feedback received on the particular module.
- **Lesson Source Tab**
 - This page identifies where the content is derived from and allows you to 'Report Broken' links to lessons that may be malfunctioning or not appearing as intended.
- **Print Blank Quiz**
 - This allows you to access a blank PDF copy of the associated quiz for employees who may prefer to print and complete the hard-copy quiz.
- **Print Answer Key**
 - This allows you to access a PDF which you may print which outlines the questions and correct answers for the particular modules Quiz.
- **Enter Class Results**
 - See Diagram S.No.27. This page allows you to enter in the written quiz results for the appropriate module. If your employees name is not displayed, choose 'Add Student to Class' to search the employee name and 'Add Selected Employee'. This will then allow you to **indicate the Quiz score, Quiz date** and **'Submit Class Results'**.
 - Hint: It is recommended that your completed hard-copy quiz' be sent into your Records section in SafetySync as proof of completion to back-up your input quiz scores OR to be kept on file for at least 3 years.

Enter Written Quiz Results for Confined Space Awareness



Rather than have all employees take the lessons online, training administrators have the option to show the lessons in a classroom setting, have the students hand-write the quizzes, mark the quizzes against the answer key, then upload the quiz results for the current "class" below:

Last Name	First Name	Middle	Position	Location	Quiz Score(%)	Quiz Date	Passed	Remove From Class
Bob	Billy		Trainee	Head Office	<input type="text"/>	<input type="text"/>	Pass All	
Connery	Sean		Operations Manager	Head Office	<input type="text"/>	<input type="text"/>		
Foster	Jodie		Supervisor	Peace Country	<input type="text"/>	<input type="text"/>		
Gaheer	Meenakshi		Safety Manager	Head Office	<input type="text"/>	<input type="text"/>		
Hanks	Tom		Safety Manager	Head Office	<input type="text"/>	<input type="text"/>		
Jolie	Angelina		Employee	Head Office	<input type="text"/>	<input type="text"/>		
Pitt	Brad		Employee	Peace Country	<input type="text"/>	<input type="text"/>		
Winfrey	Oprah		President	Head Office	<input type="text"/>	<input type="text"/>		

[Add Student to 'Class'](#)

[Submit Class Results](#)

S.No.27


Custom Courses

Another exciting feature offered within SafetySync's Online Safety Management System includes Custom Courses that your company Administrator may complete to demonstrate OTJ Training (Job Tasks) or any other type of training via personalized videos or PDF's.

To build a custom course, navigate to [Admin > Training > Online Courses > Custom Courses > Create New Course](#).

1. To get started, you'll want to [Upload Course Icon](#), Provide a [course name](#) along with a brief [description](#). Once this information is entered, we may begin including modules within this course. [Save Changes](#).

Course Details



Course Name:

Description:

500 characters remaining

S.No.28

- *Tips for Creating Courses:*
 - *Courses are meant to contain multiple lessons on a general topic*
 - *Once created, you can set options for your custom course in the Courses tab*
 - *The image you upload here will appear on the wallet card/certificate*
2. Next, select **'Create New Lesson'** to create your first course module/chapter. Here you'll need to enter your **Lesson Name, Run Time and choose your method of upload:**
- a. **Website Link:** Simply paste your website link for material you want reviewed prior to a quiz being taken.
 - b. **Slide Share Embed Code:** Simply paste your Slide Share Embed Code in this section for material you want reviewed prior to a quiz being taken.
 - c. **YouTube Video ID:** 12 digit string after v= in the URL under Sharing options e.g. TdoAYC1EGJ8
 - d. **File:** A file may be uploaded from your computer. Available upload formats include: PDF, PPT, PPTX, DOC, DOCX, and MP4.
 - e. **Save Changes**

Course Name :	test
Lesson Name :	<input type="text" value=""/> 75 characters remaining
Run Time:	<input type="text" value=""/> (Minutes)
<input checked="" type="radio"/> Website Link:	<input type="text" value=""/>
<input type="radio"/> Slideshare Embed Code:	<input type="text" value=""/>
<input type="radio"/> Youtube Video ID:	<input type="text" value=""/>
<input type="radio"/> File (pdf, ppt, pptx, doc, docx, mp4):	<input type="button" value="Browse..."/> No file selected.

S.No.29

- *Tips for Creating Lessons/Modules:*
 - *When asked for the Run Time of a file you are uploading, simply estimate the time needed to review the file*
 - *Try to divide up large PowerPoint presentations into 30 slides or less per lesson*
 - *We recommend keeping videos under the 15 minute range to help with memory retention*
3. Next, Choose **'Create New Question'** to begin creating a list of questions associated with this lesson/module
- a. **Type:** Select whether your question is either Multiple Choice OR True/False
 - b. **Question:** Include your question in this box, up to 2000 maximum characters. You may also provide a **'Reasoning'** explanation to give credibility as to why the correct answer is what it is.
 - c. **Answers:** You must select which of your option answers shows the correct answer based on what you have written for the answers.
 - d. **Optional:** you may add images to this section as well. For example, you might want to add images if your question asked 'Which of the following symbols verifies that PPE is industry approved?' Images in this instance may be added to the corresponding answer(s) using **'Choose File'**.

Settings	Question	Image	Reasoning
<input checked="" type="radio"/> Multiple Choice <input type="radio"/> True/False	<div style="border: 1px solid #ccc; height: 80px;"></div> <p>2000 characters remaining</p>	<input type="button" value="Choose File"/>	<div style="border: 1px solid #ccc; height: 60px;"></div>
Answers:			
Answer 1: <input type="radio"/> Is Correct	<div style="border: 1px solid #ccc; height: 40px;"></div>	<input type="button" value="Choose File"/>	
Answer 2: <input type="radio"/> Is Correct	<div style="border: 1px solid #ccc; height: 40px;"></div>	<input type="button" value="Choose File"/>	
Answer 3: <input type="radio"/> Is Correct	<div style="border: 1px solid #ccc; height: 40px;"></div>	<input type="button" value="Choose File"/>	
Answer 4: <input type="radio"/> Is Correct	<div style="border: 1px solid #ccc; height: 40px;"></div>	<input type="button" value="Choose File"/>	

S.No.30

After your first question is created, you may continue adding questions using the 'Create New Question' button which will be visible once your first question is saved.

****Step 8: Components**

Now that you understand the basic functions and capabilities of the online system, it is critical to review your 'Components' and ensure appropriate Defaults are selected before moving on to further detail in **Part II**. Navigate to Admin > Monitoring > Components.

Because there are so many options under this section, it is critical to read and review the description that each of the components elements may offer. To demonstrate, we will simply review a few of the most commonly used settings outlined below.

Safety System Monitoring

This page outlines the frequency with which you would like Employees notified of compliance reminders for themselves. Also, the frequency with which your supervisors receive their Subordinate compliance reports, all which demonstrate System compliance with Course, Policies, Procedures, Valid certificates, Employee Reminders and much more!

Note: Part II Reviews adding workers to SafetySync, Please see this section to review how to assign supervisors specifically to personnel in order to ensure correct assignment and generation of subordinate compliance reports.

Example of compliance reminder S.No.31:



S.No.31

Policy Distribution and Acknowledgement

This page allows us to choose Defaults for the system with regards to system reminders. For example, we may assign specific extra time to review certain policies or procedures but this page allows us to choose the overall, default, minimum amount of time staff must review all other Policies, expiry of policies, Safety Points/Rewards (Discussed further in Part II) and much more.

Equipment Tracking Components

If your company does not own any equipment, you can go here to de-select that item from appearing in the administrative menu.

(M)SDS Components

If you do not have any chemicals present what-so-ever in your office, you may navigate to this place in order to turn the feature off entirely. Note: It is critical to include MSDS for any cleaners, Inks/toners, etc. that may be used in an office. Safety Data Sheets must be available for any possibly hazardous chemicals.

Safety Awareness Training

This components section allows us to select criteria pertaining to training courses including:

- Q1) How long after passing a quiz should a training record expire? A) 1-5Years or Never.
- Q2) Can employees challenge quizzes without having to view the lessons first? A) Yes/No
- Enable/Disable Quizzes and much more!

As always, [Save changes](#) any time you change any of these elements!

Summary

SafetySync would like to take the time to thank you for reviewing **Part I: Introduction to System Tools**. We hope that with practice and guidance, your company will utilize SafetySync to its full capabilities and make it an integral part of your safety program. **Part II: Assigning criteria post-setup** goes into further detail of additional system tools once Part One is effectively understood. For any questions, comments or concerns, you may contact customer support at: **1.888.668.6403** or support@SafetySync.com.