

Safety Forms Guide for Administrators

This guide gives direction on setup of the Safety Forms product in the Safety Reports Enterprise System. The system is a fillable form with results aggregated for the account in cloud storage reviewable by web administrators.

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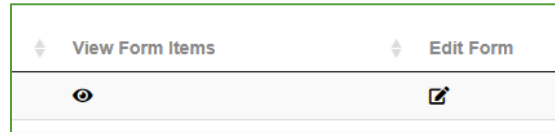
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Forms Maintenance

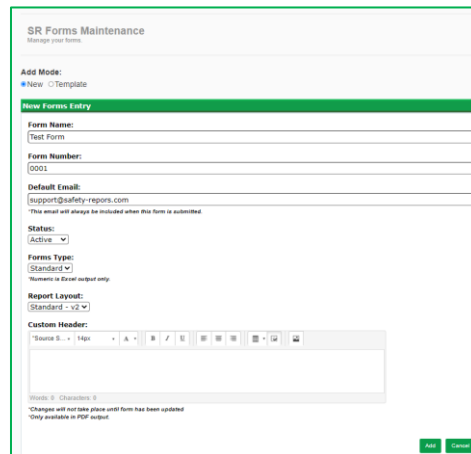
This section is where Safety Forms content and setup are managed; to create a new Form, press the 'Add New Form' button on the page.

To edit the sections or questions within a form, use the 'eye' icon in the View Forms Items column. To edit the form settings, choose the pen and pad icon in the 'Edit Form' column.



Editing Form Settings

Include a Form name and if applicable Form Number and a Default email, which will come into play if you want a designated person(s) to receive an email when Forms are submitted by authors in the field. Remaining settings include Forms Type (described below), report layouts (described below), logos/headers and settings related to cover forms for standard form types.

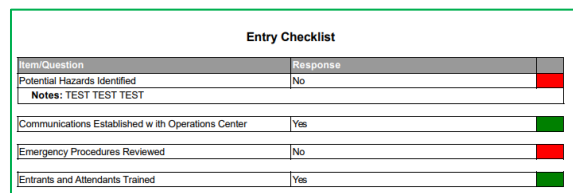


The image shows the 'SR Forms Maintenance' interface with a 'New Form Entry' form. The form includes fields for Form Name, Form Number, Default Email, Status, Forms Type, Report Layout, and Custom Header. There are also 'Add' and 'Cancel' buttons at the bottom right.

Form Types

Numeric and Standard are the types currently available for use in the app. Depending on the intended use of the form, you will choose one or the other. For forms which need a scoring or scaling system, choose Numeric, for those which may have conditional questions (if 'yes' then...) choose Standard.

The Standard format generates a PDF or Excel document that shows the response to the questions.



Entry Checklist	
Item/Question	Response
Potential Hazards Identified	No
Notes: TEST TEST TEST	
Communications Established with Operations Center	Yes
Emergency Procedures Reviewed	No
Entrants and Attendants Trained	Yes

Forms Maintenance (cont.)

Numeric type generates an excel document that uses a value-based score system (i.e., questions/options that the authors select with graduating values 1-5).

Question	Response	Notes	Score
Do you have Safety Accountability program in place?	Yes. All Employees are held accountable for safety activities in their departments.		5
Section Score (1 of 2)			50.00%
SCORE SUMMARY			Score
Section			Section Points
First Section			Section Score (1 of 2)
Total Score (1 of 2)			50.00%

Editing Forms Items

Forms are setup to be managed in Sections, use the green 'Add New Section' button to add sections; or use the pen and pad icon in the 'Edit' column to change the section title.

To update the content within a section (add/drop/change questions) use the 'View Forms Items' button.

When in the edit screen, questions are shown down the screen, one to a row. You are able to edit any of these using the 'Edit' button.

Form Question	Type	Sort	Edit	Followup	Del
Sprinklers, hose streams, and extinguishers in service and operation?	Yes-No-N/A	1.0	✎	⊕	✖
Hot work equipment in good working condition AND manufacturer's specifications?	Yes-No-N/A	2.0	✎	⊕	✖
Hot work to be performed on metal vessels or pipes lined with rubber or glass?	Yes-No-N/A	3.0	✎	⊕	✖
Special permission obtained?	Yes-No-N/A	5.1	✎	⊕	✖

Information on different question types and other items related to setup are available throughout the site. The easiest way to find information on questions is shown here the green 'Need Help?' button in the question settings screen.

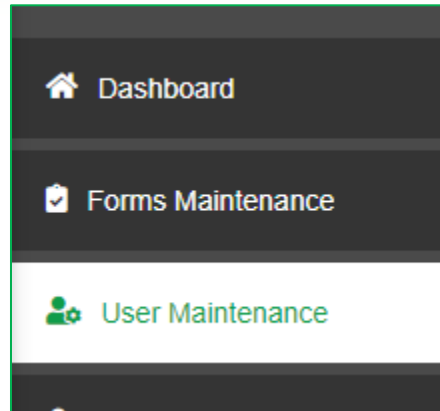
Need Help?

- Yes-No-N/A ⊕
- Numeric ⊕
- Text ⊕
- Date/Time ⊕
- Multiple Choice ⊕
- Signature ⊕

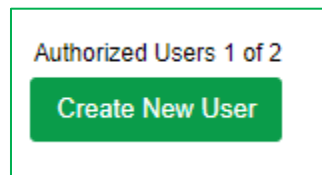
Note: Adding a 'Follow up' is only available for certain question types.

User Maintenance

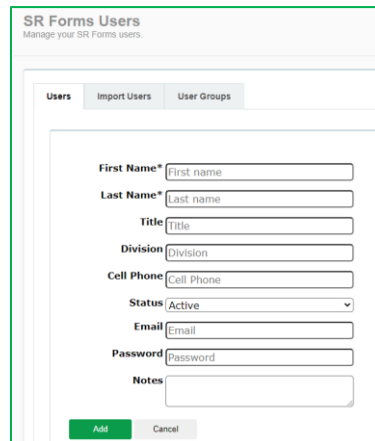
From the functions at the far-left hand side of the admin screen, choose the 'User Maintenance' function at the far-left.



To add a new user profile for a Forms author, choose the green 'Create New User' button



Enter the applicable information (required fields are marked with an asterisk *) and press 'Add' at the bottom of the screen.

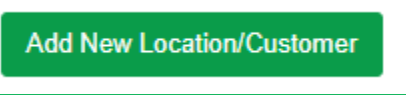
A screenshot of a web form titled 'SR Forms Users' with the subtitle 'Manage your SR Forms users.' The form has three tabs: 'Users', 'Import Users', and 'User Groups'. The 'Users' tab is active. The form contains the following fields: 'First Name*' (text input), 'Last Name*' (text input), 'Title' (text input), 'Division' (text input), 'Cell Phone' (text input), 'Status' (dropdown menu with 'Active' selected), 'Email' (text input), 'Password' (text input), and 'Notes' (text area). At the bottom, there are 'Add' and 'Cancel' buttons.

Note: these same steps apply when editing an existing user's profile.

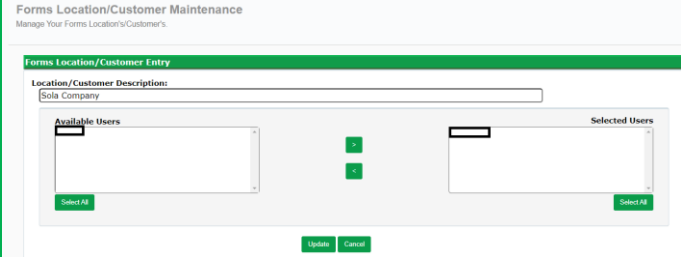
Location/Customer

The settings in this part of the admin site are for managing locations if your account does not have a connection between the Forms system, and the Safety Inspection system. If that is the case, ignore this section.

To add a new Location/Customer, click on the green 'Add New Location/Customer' button, and add the name of the Location/Customer on the screen which follows.

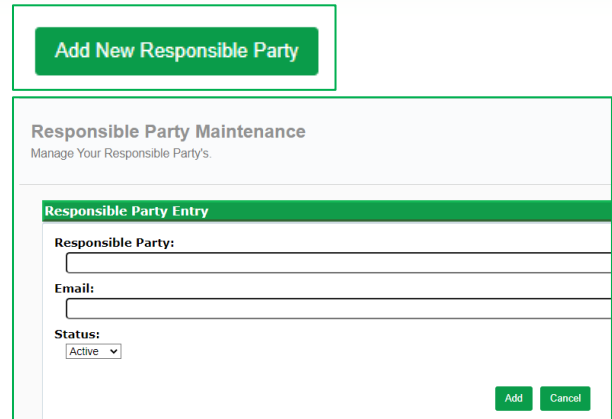


The Location field can be tied to the Author field, as with other Safety Reports products, to potentially limit which locations a user is able to create new Forms for. Choose the 'Edit' button and use the green selectors to move Forms authors from the 'Available User' column, to the 'Selected User' column, and 'Update' when complete.



Responsible Party

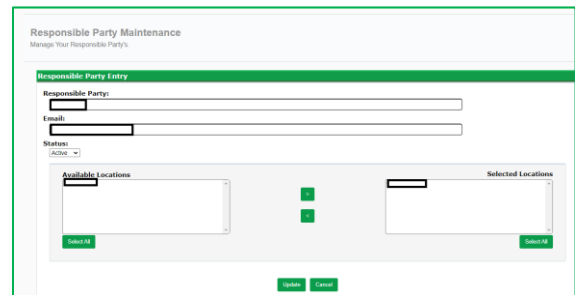
To add a new Responsible Party, click on the green button, 'Add New Responsible Party' and add the name and email of the Responsible Party. You are also able to update whether responsible parties receive PDFs from Forms authors by selecting whether they are 'Active' or 'Inactive' in this part of the site.



The image shows a green button labeled 'Add New Responsible Party' at the top. Below it is a form titled 'Responsible Party Maintenance' with the subtitle 'Manage Your Responsible Party's'. The form has a green header 'Responsible Party Entry' and contains three input fields: 'Responsible Party:', 'Email:', and 'Status:'. The 'Status:' field is a dropdown menu currently set to 'Active'. At the bottom right of the form are two buttons: 'Add' and 'Cancel'.

Responsible Parties receive a copy of the Form PDF when an action item is assigned in the app (this may or may not be the case with your account settings). Responsible Parties in the Forms system are tied to a specific location or set of locations.

As with managing Locations, you use the 'Available Locations' and 'Selected Locations' columns

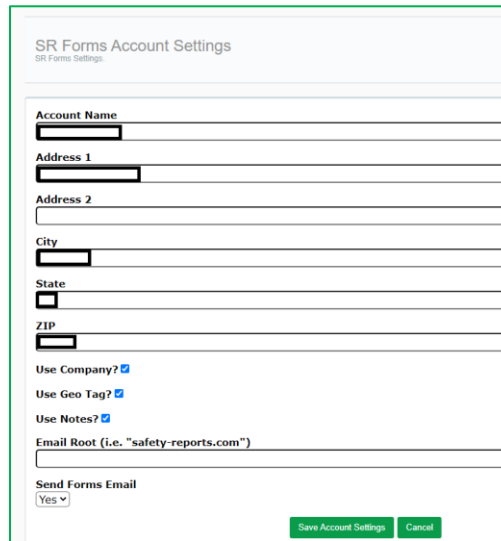


This screenshot shows the 'Responsible Party Maintenance' form with the 'Available Locations' and 'Selected Locations' sections. The 'Available Locations' section has a dropdown menu and a 'Select All' button. The 'Selected Locations' section has a dropdown menu and a 'Select All' button. Between these two sections are two green buttons: a plus sign (+) and a minus sign (-). At the bottom of the form are 'Update' and 'Cancel' buttons.

Note: Using Corrective Action tracking with Safety Forms enables the system to send emails from the Safety Reports to 'responsible parties,' who can then update action items assigned to them. Ensure only folks who will be involved in this process are named as Responsible Parties to prevent the recipients from mistakenly thinking the messages are Spam. All email messages from Safety Reports are legitimate emails.

Account Settings

Account Settings allow you to prefill your Company Name, Address, City, State, and Zip Code. Along with that, you have a few additional features which allow you to update items related to the account and/or options for the Forms authors such as, enabling them to add a geo tag location; enabling a notes field to the form etc.



The screenshot shows the 'SR Forms Account Settings' form. It includes the following fields and options:

- Account Name: [Redacted]
- Address 1: [Redacted]
- Address 2: [Redacted]
- City: [Redacted]
- State: [Redacted]
- ZIP: [Redacted]
- Use Company?
- Use Geo Tag?
- Use Notes?
- Email Root (i.e. "safety-reports.com"): [Redacted]
- Send Forms Email: Yes ▾

At the bottom right, there are two buttons: 'Save Account Settings' and 'Cancel'.

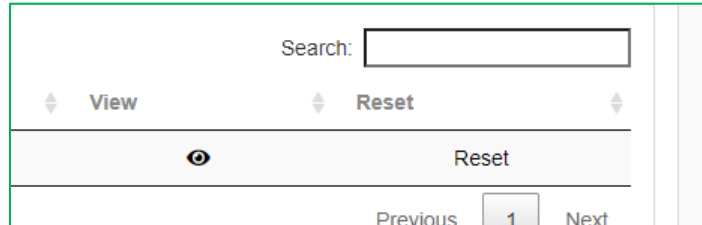
As mentioned previously, one setting affects Locations. If you have the Safety Inspection system and wish to use Inspection Companies, check this box.

Email Root is used where a large number of employees may potentially download this application all at once. The system can be setup to recognize new user profiles who registered with your email domain, by typing the model domain in this line. With this setting in place, it will tie users to the account automatically when they complete registration.

The final setting toggles whether or not a PDF of completed Forms are emailed upon submission by the author.

Completed Forms

Completed Forms is the function which allows you to view forms that have been submitted from authors using the app. To do this, click on the eyeball icon underneath the 'View' column and it will launch the PDF version of the completed form.

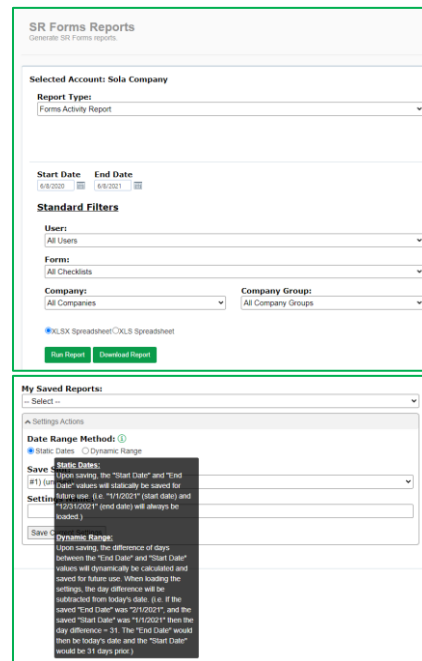


If at any point after submission, you need the author to make changes and resubmit a form, you can do so by selecting the 'Reset' button. This will take the form out of 'submitted' status and return it to draft status back on the user's profile.

Performance Reports

Performance Reports is where you can run a report that will show you a history of all the forms that have been completed within a specific date range.

The filters default to 'All', but there are a few filters you can use which include: User (filter by specific user); Form (filter by specific form); Company or Location, and Groups of either, depending on which you are using to manage locations. Filters limit the report output to only what you've selected. After running the report, you have the option to save the report filters. Safety Reports Forms has a feature to allow different Date Range Methods. Hover over the (i) icon as shown in the image to help decide which to use.



For more information, contact:

Safety Reports at support@safety-reports.com or (402) 403-6575 option '2'