

Location Management Guide (All Applications)

This guide is meant to describe methods of managing locations across several applications in the Safety Reports System.

General Items and Considerations

In general, most accounts tend to setup locations in the Safety Reports system based on static, physical locations such as a regional office, and not projects which may end in a number of months; that is also what we recommend. However, managing locations which may be temporary can be done by use of inactivation.

Another item to consider is the setup of Safety Inspection, if applicable. The reason for this consideration is that it is possible to use the inspection company settings with regard to locations from Safety Inspection into Safety Obs, Incidents, and Forms. This is a 'checkbox' available to the account administrator, like the example shown here.

Use Company?

Typically, locations are setup as inspection companies, these can be shown as locations on these applications. Also, if Job Bank is used, the Job Bank projects can be connected to Safety Obs.

Show Job Bank projects?
Show Inspection Companies?

The 'check' chosen by the administrator in this example causes Job Bank groups, and Job Bank jobs to be shown in the Obs app as drop-down menus. This is similar in other applications, where the 'Location' drop-down will show inspection companies.



The screenshot shows the 'Observation App' interface with the 'SAFETY REPORTS' logo. It features two dropdown menus: 'Job Bank Group' and 'Job Bank', both with downward-pointing arrows. The 'Job Bank Group' dropdown is currently empty, and the 'Job Bank' dropdown is also empty.

Use of Locations versus Inspection Companies

Accounts may decide to manage a separate set of locations for these products, depending on how distribution of email/responsibility is handled. If using the function which pairs these applications to the settings of Safety Inspection, corrective actions and notifications will be sent to the Inspection App Company contact. Where the requirement is more specific, or a distribution list needs to be more expansive than that, consider using 'Locations' rather than connecting them to the settings of Safety Inspection.

For example, if OSHA reporting needs in Safety Incidents dictate a need for named reporting entities for an OSHA 300 log which do not correspond to Inspection Companies, and/or those who deal with incidents are not the same who deal with results of safety inspections, you would not want to have companies. The same is true of other applications. In the example shown here, from an internal 'TEST' account, 10 inspection companies exist for what amounts to 2 reporting entities for Safety Incidents, which maintain one log for their respective locations.

Company	Code
Corporation	Colorado
Corporation	Florida
Corporation	Headquarters
Corporation	Maine
Corporation	Virginia
Industries	California
Industries	Maine
Industries	Ohio
Industries	Washington



Entity	City
Corporation	C
Industries	C

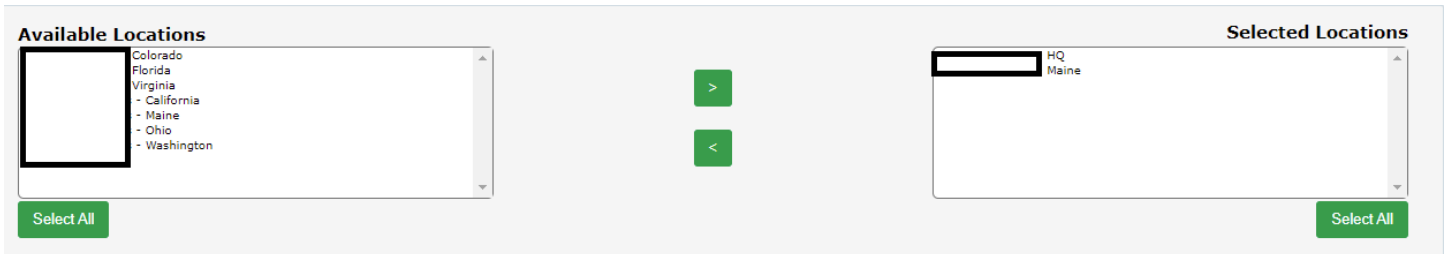
If using Locations for Safety Obs, Safety Incidents or Safety Forms, you have the option to tie responsible parties to the locations specifically.

For Safety Obs, you are able to tie only a single responsible party to a Location; for the others, you are able to assign multiple(s) of either. The assignments can be done using either Responsible Party Maintenance or Location Maintenance from the Admin site, by moving locations and/or responsible parties between 'Available' and 'Selected' columns.

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Use of Locations versus Inspection Companies (cont.)

The example here is from Safety Incidents using the same internal 'TEST' account; and shows details for a responsible party who according to this setup, receives incident reports from two 'Selected' locations, but not from the other seven 'Available' locations.



The screenshot displays a user interface for selecting locations. On the left, under the heading "Available Locations", a list of states is shown: Colorado, Florida, Virginia, California, Maine, Ohio, and Washington. A "Select All" button is located below this list. In the center, there are two green arrow buttons pointing right and left. On the right, under the heading "Selected Locations", a list shows "HQ" and "Maine". A "Select All" button is also present below this list.

Unique Location Use in Safety Scan

Safety Scan allows for assets to be setup with more location attributes than that of other apps in the Safety Reports System. There is no strict connection in place which ties assets to an Inspection company, rather it's up to administrators what among the different location-related attributes make sense for their assets. Available attributes which can describe an asset's location include one named 'Location' and also Building, Floor, Area, Division, and Zone.

Some of these may apply to a certain type of asset or worksite, but not. Fire extinguishers for example may use each of these attributes if permanently hung in areas near applicable hazards; but a truck-mounted boom crane would not.



Assets which are permanently fixed can also be assigned a Geo Tag which fixes both a Longitude and Latitude in the asset attributes. Some accounts have chosen to use the 'Division' field to express a business unit which may be an inspection company for reporting, though any method preferred by the administrator can be used.

For more information, contact:

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