

## **Safety Scan Guide for Administrators**

This guide gives direction on setup of the Safety Scan product in the Safety Reports Enterprise System. The system is asset-based, built to allow QR codes or manual entry of a unique equipment ID from the field to launch an inspection in the mobile app, with results aggregated for the account in cloud storage reviewable by web administrators. Applications for this product are extremely variable, from routine inspections for fire extinguishers through return-to-work screenings for employees.

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## Asset Setup

This first step is the most important. Assets can be added manually but are typically and most easily uploaded by use of a spreadsheet template, provided by Safety Reports. Attributes assigned to assets will vary based on how inspections are to be performed, and on the company's department or location arrangement.

At a minimum, the fields required to upload assets are the *Asset Name*, *Asset Type* and *Tag ID* (the asset's unique ID). This will allow an item to have a barcode, be linked to a checklist, and be tracked using this system. Optional fields include the following: Area, Building, Category, Division, Daily Days, Floor, Inspection Frequency, Location, Location Tag ID, Latitude, Longitude, MFG, Model, Route, Serial #, Size, Vendor, Zone. The most common of these additional fields are the Route, Location, and Inspection Frequency. Those functions are discussed later in this document.

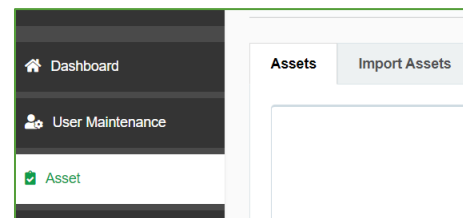
### Asset Setup (template)

Add Assets in the fields provided, according to their unique setup on the template. When complete, delete rows and/or columns as needed and transform the list into a CSV file format. It should appear similar to the screenshots here.

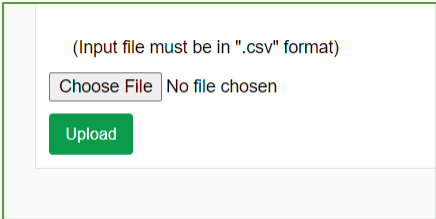


	A	B	C
1	Asset Name	Asset Type	Area
2	Fire Extinguisher 01	Fire Extinguisher	Production Floor
3	Fire Extinguisher 02	Fire Extinguisher	Production Floor
4	Fire Extinguisher 03	Fire Extinguisher	Production Floor
5	Fire Extinguisher 04	Fire Extinguisher	Production Floor
6	Fire Extinguisher 05	Fire Extinguisher	Production Floor
7	Fire Extinguisher 06	Fire Extinguisher	Production Floor
8	Fire Extinguisher 07	Fire Extinguisher	Production Floor

From the admin account, choose 'Asset' and on the screen which follows, choose the grey 'Import Assets' tab.



Choose the grey 'Upload' button to launch your computer's file tree, and choose the CSV file



## Asset Setup (template cont.)

When in the frame, use the green 'Upload' button to add the list into the upload frame. The screen should look like the screenshot here.

Optionally the CSV can include:  
Asset Name, Division, Route, Zone, Location, Location Tag ID, Building, Floor, Area,  
Asset Type, Category, MFG, Model, Vendor, Serial #, Size, Latitude, Longitude

Upload Asset List to:

☒ Skip first row

Asset Name	Asset Type	Area	Building	Category
Fire Extinguisher 01	Fire Extinguisher	Production Floor	North Building	Life Sa
Fire Extinguisher 02	Fire Extinguisher	Production Floor	North Building	Life Sa
Fire Extinguisher 03	Fire Extinguisher	Production Floor	North Building	Life Sa

Use the drop-down menus to choose the correct column name for the fields you are adding, after completion, choose the green 'Import' button at the bottom.

**Note:** this process can be time consuming to do and the system does not prevent errors, please feel free to contact our Support or Project staff for assistance with asset uploads (at no additional cost) any time.

## Asset Setup (manual)

From the admin account, choose 'Asset' and on the screen which follows, the white 'Assets' tab will be shown.

The screenshot shows a sidebar with 'Dashboard', 'User Maintenance', and 'Asset' (highlighted with a green checkmark). The main content area has two tabs: 'Assets' (active) and 'Import Assets'.

At the far right, choose the green 'Create New Asset' button.

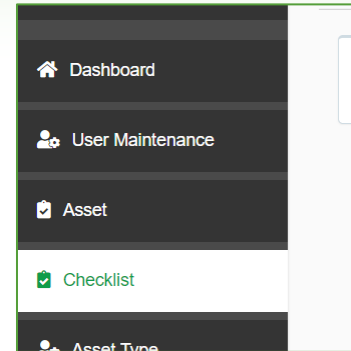
The screenshot shows the 'Assets' tab with a status bar indicating 'Authorized Assets 75 of 250'. Below this, there is a green button labeled 'Create New Asset (75 of 250)' and a green button labeled 'Export All Assets'.

Add Asset attributes in the fields provided, similarly to how they are entered into the template discussed earlier in this document. When finished, choose the green 'Add' button at the bottom of the screen.

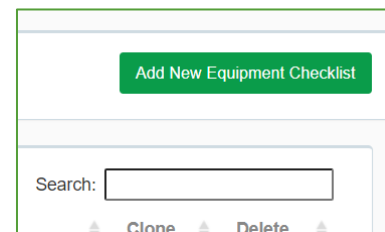
The screenshot shows the 'Equipment Asset Entry' form with the following fields: 'Asset Name' (text input), 'Asset Type' (dropdown menu with 'None' selected), 'Asset Tag ID' (text input), 'Asset Category' (dropdown menu with 'None' selected), 'MFG' (text input), and 'Model' (text input). A green 'Add' button is at the bottom.

## Checklist Creation

From the functions at the far-left hand side of the admin screen, choose 'Checklist'



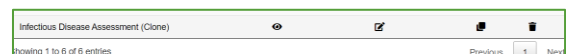
At the far-right, choose the green 'Add New Equipment Checklist' button.



Checklists can either be created from scratch, or can be created from templated Safety Reports checklists, available from the drop-down menu. Either choice allows full edit and customization, and the templated checklists may serve as a time saver for administrators.

A screenshot of a form titled 'Equipment Checklist Entry'. It has two main sections. The first section, 'Checklist Name:', has a text input field and 'Add' and 'Cancel' buttons. The second section, 'From Template', has a dropdown menu showing 'Fire Extinguishers (ABC Powder)' and an 'Add From Template' button.

When added, the new checklist will be shown as a row, available for Edits and addition of checklist content. In the following examples, the 'Infectious Disease Assessment' is shown.



**Note:** the 'Edit' function allows for name changes, the 'View Item List' function is where content is added.

Use the 'View Item List' to add new checklist questions or to Edit existing questions anytime. Details are discussed in the following section.

## Checklist Creation (Question Types)

For all Question types, the 'Question Info' field allows for additional detail to be added to a question, so that in the mobile app when the inspector selects the question, the 'Question Info' is shown above their other options.

'Yes/No' is the default and most common question type, which allows for the inspector in the mobile app to 'check' a box which records a positive response. This setup also requires the administrator to phrase questions so that 'Yes' is positive, and 'No' is negative, users of our inspection software will notice this setup is the same.

The screenshot shows the 'Question Edit' interface. The 'General' tab on the left contains the following fields: 'Question:' with the text 'In last 14 days, have you been free of fever, cough or shortness of breath?'; 'Question Info:' with the text 'These symptoms may appear 2-14 days after exposure (based on the incubation period of MERS-CoV viruses).'; 'Standard:' with the text 'CDC Interim Guidance for Businesses'; 'Reference:' with the URL 'https://www.cdc.gov/coronavirus/2019-ncov'; and 'Archived:' with a dropdown set to 'No'. The 'Details' tab on the right shows 'Question Type:' set to 'Yes/No'. Under 'Responses:', the 'Warn' checkbox is checked for both 'Yes' and 'No' responses, while the 'Fail' checkbox is unchecked. A 'Warning Message:' field contains the text: 'Employee/Visitor should NOT be allowed on site and should be encouraged to go home and self-isolate per CDC guidelines and public health policies.' At the bottom right are 'Update' and 'Cancel' buttons.

Most questions have a very similar overall setup, with different options at the far-right. For Yes/No in the example, all fields are filled out, and optional items are chosen along with the responses.

Standards and References allow external citations to be included, similar to the Safety Reports Inspection App. The 'Details' section at the right is where items are changed based on the desired format for inspectors in the field. In this case, the 'No' response is set to both 'Warn' the inspector (a message is displayed as a popup on their mobile app) and to 'Fail' the asset for this part of the inspection. On the web admin site, this creates a corrective action which can be followed up on later. If using Responsible Parties and Locations (details discussed later) this 'Fail' will also cause an email based on the corrective action to be sent out. When all parameters you want are included, choose the green 'Update' button for all question types.

'Numeric' question type directs the inspector to enter a number value, in the example shown, a temperature. This question type allows the administrator to select a range of what the app will consider acceptable entries. Entries above or below the range entered in the mobile app will cause the asset to 'Fail' for this part of the inspection. Applications for a Numeric entry are variable and need not only be used for a Temperature range.

The screenshot shows the 'Question Edit' interface for a 'Numeric' question type. The 'General' tab on the left contains: 'Question:' with the text 'Take employee/visitor temperature (preferably using non-contact infrared thermometer) and record results.'; 'Question Info:' with the text 'If temperature is less than 100.4 degrees Fahrenheit (38.0 degree Celsius) and no other symptoms are present, allow into'; 'Standard:' with the text 'CDC Interim Guidance for Businesses'; 'Reference:' with the URL 'https://www.cdc.gov/coronavirus/2019-ncov'; and 'Archived:' with a dropdown set to 'No'. The 'Details' tab on the right shows 'Question Type:' set to 'Numeric'. Under 'Numeric Type:', 'Reading' is selected. The 'Unit:' is set to 'Degrees F'. Under 'Responses:', the 'Warn' checkbox is checked for 'Min' (97) and 'Max' (100.3), while the 'Fail' checkbox is unchecked. A 'Warning Message:' field is empty. At the bottom right are 'Update' and 'Cancel' buttons.

## Checklist Creation (Question Types cont.)

**Note:** there is no need to add 'Warn' or 'Fail' to the entries in Numeric questions, as any value outside the range will automatically cause the Asset to 'Fail' for this question.

'Text' question type is the most broadly-applicable, as it provides a place for the inspector to enter text in the mobile app. Unlike the Numeric question type, responses do not need to be numerals only, but can also be letters, spaces, characters etc.

The 'Question Edit' form for a Text question type is divided into two main sections: General and Details. The General section contains fields for the question text, question info, standard, reference, and an archived status dropdown. The Details section contains a dropdown for the question type (set to 'Text') and a text input for the item prompt. At the bottom right are 'Update' and 'Cancel' buttons.

'Date' question type is for date entry. Under Details it can be set to default to today's date or can provide a field for the inspector to enter a date as directed. In the example this is for return from travel date, but the applications need not be limited to this type of use.

**Note:** The inspection date on the admin site's Asset Overview will show the date the inspector submitted their inspection, regardless of what they put in this field.

The 'Question Edit' form for a Date question type is divided into two main sections: General and Details. The General section contains fields for the question text, question info, standard, reference, and an archived status dropdown. The Details section contains a dropdown for the question type (set to 'Date') and a checkbox for 'Default to Today:'. At the bottom right are 'Add' and 'Cancel' buttons.

'Multiple Choice' question type can be used to have inspectors choose a value from a drop-down menu in the app, from among items put in by the administrator. Further, you can choose whether a certain value will cause the asset to 'fail' if entered. In the example, this is for a subjective health quality on a range from Great to Poor, in which selecting 'Poor' causes the asset to Fail. As with other examples, this question type can be used for anything the admin wants the inspector to choose from.

The 'Question Edit' form for a Multiple Choice question type is divided into two main sections: General and Details. The General section contains fields for the question text, question info, standard, reference, and an archived status dropdown. The Details section contains a dropdown for the question type (set to 'Multiple Choice') and a table for responses. The table has columns for 'Response', 'Warn', and 'Fail'. Below the table is a text input for the warning message. At the bottom right are 'Add' and 'Cancel' buttons.

## Checklist Creation (Question Types cont.)

'Condition' question type allows the inspector to choose whether the equipment is in a particular condition from among the following: 'In Service' 'Replaced' or 'Out of Service.' In the example provided, the checkbox for 'Change Equipment Status to Match' is selected. This will in turn edit the Asset status to show the same. Extremely useful if removing defective equipment, but applications are not limited to those in the examples.

The screenshot shows the 'Question Edit' form with two tabs: 'General' and 'Details'. The 'General' tab is active, showing a 'Questions' section with a text input 'Choose Asset Condition'. Below it is a 'Question Info' section with a dropdown menu for 'Choose what condition to place the asset in'. The 'Details' tab is also visible, showing a 'Question Type' dropdown set to 'Condition' and a checkbox labeled 'Change Equipment Status to Match' which is checked. At the bottom right of the form are 'Add' and 'Cancel' buttons.

## Managing Asset Types

The previous section on checklists is required to have QR codes scanned in the field to launch an inspection in the mobile app. By use of Asset Types, checklists are paired to types of assets, among other functions such as inspection frequency. Using these functions together it is possible to assign multiple checklists to an asset type, provided they are for different frequencies.

Choose the 'Asset Type' function at the far-left of the admin screen, and you will see the available asset types, one to a row in the screen to the right. Fire Extinguishers will be used in the following examples.

The screenshot shows the 'Asset Type' management screen. On the left is a sidebar with four items: 'Asset', 'Checklist', 'Asset Type' (highlighted in green), and 'Location'. On the right is a list of asset types: 'Automobile', 'Fire Extinguisher', 'Emergency Light', 'Exit Sign', and 'Eyewash/Shower Stat'.

The process is very similar whether adding an asset type from scratch, or whether editing an existing asset type, with exception of the Add Asset Type step. To add a new Asset type, use the green button of the same name toward the top-right of the screen.

The screenshot shows a green button labeled 'Add New Asset Type' at the top right. Below it is a search bar and a table with a 'Delete' button and a trash icon.

## Managing Asset Types (cont.)

On the screen that follows, or, if editing an existing asset, add or change the name of the Asset Type in the 'Description' text field.

Assign a Checklist using the drop-down menu, and inspection history by 'checking' the box(es) next to how often this asset type is to be inspected.

Frequency	Checklist
<input checked="" type="checkbox"/> Daily	
<input checked="" type="checkbox"/> Monthly	Fire Extinguishers (ABC Powder)
<input type="checkbox"/> Quarterly	
<input type="checkbox"/> Biannually	
<input type="checkbox"/> Annually	

**Note:** In this example, the use of different frequencies to assign different checklists to the same asset type is shown as fire extinguishers have both monthly and annual maintenance and inspection protocols. This function can be used for any asset type.

First, unselect a default checklist, by using 'NA' from the drop-down menu. Check the corresponding inspection frequency boxes provided, then use drop-down menus next to the Inspection Checklist menu items that correspond to the inspection frequency as shown, when complete, choose the green 'Update' button.

Frequency	Checklist
<input type="checkbox"/> Daily	
<input checked="" type="checkbox"/> Monthly	Fire Extinguishers (ABC Powder)
<input type="checkbox"/> Quarterly	
<input type="checkbox"/> Biannually	
<input type="checkbox"/> Annually	Fire Extinguishers Annual

The result of this change will allow the inspector in the mobile app to choose between monthly or annual inspections when scanning the QR code or entering the Tag ID, and then choosing 'Inspect Asset' in the field.

## Locations, Responsible Parties and Corrective Actions

These functions are shown together, as their functions are interdependent. Assigning an asset to a location accomplishes more than organization, it also allows for a responsible party to be assigned to receive emailed updates for the corrective actions generated if an asset 'fails' at their location. The following steps explain this relationship in detail.

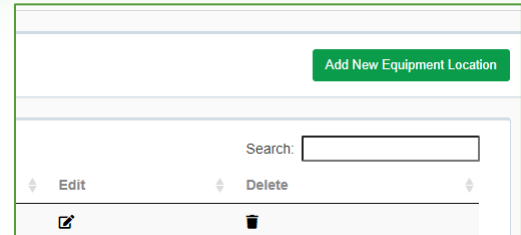
To add a new asset location, or to edit an existing location, use the function at the far-left hand side of the admin screen.

Asset Type	Aisle 3
Location	Aisle 4
	Aisle 5



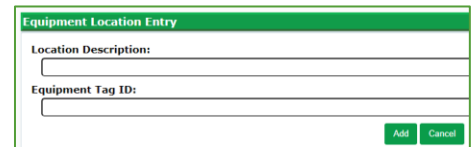
## Locations, Responsible Parties and Corrective Actions (cont.)

Choose the green 'Add New Equipment Location' button to add a location, or the 'Edit' icon on the row of the location you want to change.



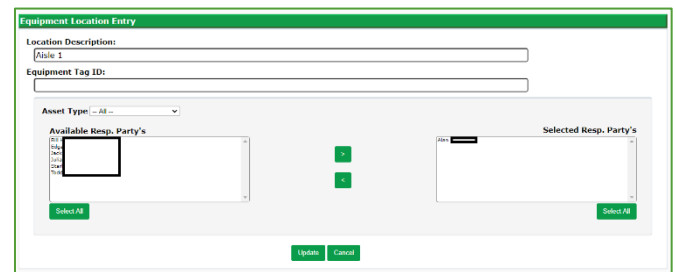
The screenshot shows a green button labeled 'Add New Equipment Location' at the top right. Below it is a search bar with the text 'Search:'. Under the search bar is a table with two columns: 'Edit' and 'Delete'. The 'Edit' column contains a green pencil icon, and the 'Delete' column contains a green trash can icon.

Add the location name, and if applicable, location Tag ID, then choose 'Add'



The screenshot shows the 'Equipment Location Entry' form. It has two input fields: 'Location Description:' and 'Equipment Tag ID:'. At the bottom right are two buttons: 'Add' and 'Cancel'.

If editing an existing location, you are also able to assign responsible parties, or set a default asset type among functions available. As with other Safety Reports admin functions, responsible parties on the left in the 'Available' column must be moved to the right-hand 'Selected' column to receive emails for corrective actions at a location and are moved using the green arrow buttons for that purpose. Use the green 'Update' button when complete.



The screenshot shows the 'Equipment Location Entry' form with the 'Available Resp. Party's' and 'Selected Resp. Party's' columns. The 'Available Resp. Party's' column has a list of parties with a green arrow button next to each. The 'Selected Resp. Party's' column has a list of parties with a green arrow button next to each. At the bottom are two buttons: 'Update' and 'Cancel'.

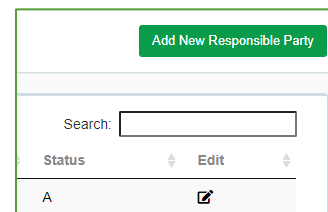
**Note:** In the same way responsible parties who receive emails can be managed through Location Maintenance, Locations which will cause a responsible party to receive an email can be managed in Responsible Party Maintenance, shown in the following section.

If there are no responsible parties shown, they must be added. Use the function at the far-left hand side of the admin screen for this purpose.



The screenshot shows the admin screen with three options: 'Location', 'Responsible Party', and 'Route'. The 'Responsible Party' option is highlighted in green.

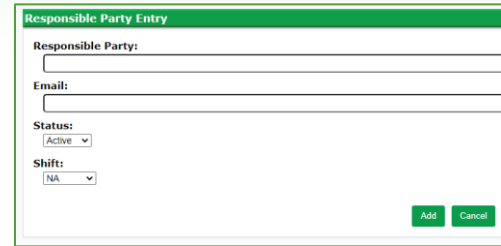
Add a new responsible party using the green 'Add New Responsible Party' button at the top-right or edit an existing responsible party by using the 'Edit' button on the row of that party you want to change.



The screenshot shows a green button labeled 'Add New Responsible Party' at the top right. Below it is a search bar with the text 'Search:'. Under the search bar is a table with two columns: 'Status' and 'Edit'. The 'Status' column contains the letter 'A', and the 'Edit' column contains a green pencil icon.

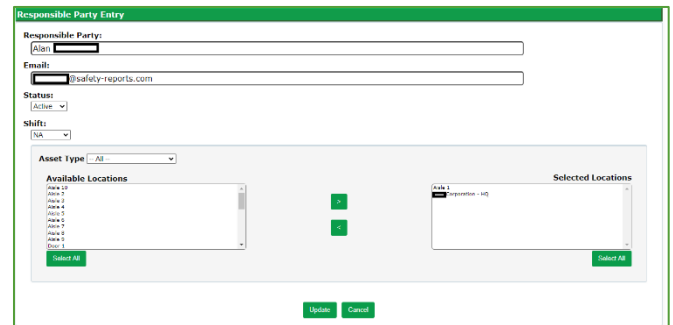
## Locations, Responsible Parties and Corrective Actions (cont.)

Name and email are required for responsible parties, their status as Active or Inactive or assignment to a Shift are optional for the administrator. Use the green 'Add' button when complete.



The screenshot shows a web form titled "Responsible Party Entry". It contains the following fields: "Responsible Party:" (text input), "Email:" (text input), "Status:" (dropdown menu with "Active" selected), and "Shift:" (dropdown menu with "NA" selected). At the bottom right, there are two green buttons: "Add" and "Cancel".

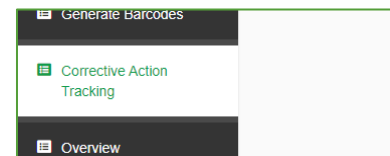
If editing an existing party, make whatever changes are required to their name, email status or shift. Set a default Asset type using the drop-down menu if you do not need the responsible party to receive emails for all items at this location. As with other Safety Reports functions, Locations in the 'Available' column need to be moved to the 'Selected' column if the responsible party is going to receive emails regarding corrective actions from inspections at that location. Use the green 'Update' button when complete.



This screenshot shows the "Responsible Party Entry" form with additional options. The "Responsible Party:" field is filled with "Alien". The "Email:" field is filled with "alien@safety-reports.com". The "Status:" dropdown is set to "Active" and the "Shift:" dropdown is set to "NA". Below these fields is an "Asset Type" dropdown set to "All". There are two columns of location selection: "Available Locations" (listing Area 1 through Area 5) and "Selected Locations" (listing Area 1). Green arrows point from the available to the selected column. At the bottom, there are green buttons for "Update" and "Cancel".

Users of the Safety Reports inspection app will be familiar with the Corrective Action Tracking function. Actions are created in an 'Open' status, and administratively 'Closed' via an update by the responsible party or administrator. Actions which may contribute to closure but do not entirely remedy the issue can be recorded. Details in the following section. In Safety Scan corrective actions are generated whenever an asset 'Fails' a particular inspection item. Specific criteria for this can be set by the administrator for each question which is detailed in previous sections related to Checklist Maintenance.

Choose the function from those at the far-left hand side of the admin screen.



Corrective actions are shown on the screen which follows, if using the admin site to change the status of a corrective action, choose the 'View' icon. If the corrective action does not require documented follow up, or you do not choose to use this system for that purpose, the corrective action can be deleted from the system.

**Note:** this 'delete' function does not remove the inspection result, only the electronically-assigned corrective action in this part of the system.

## Locations, Responsible Parties and Corrective Actions (cont.)

Management of a corrective action on a fire extinguisher is shown in this example.

The screenshot shows a table titled 'Corrective Action Status' with a search bar and a 'Show [10] entries' dropdown. The table has columns for Asset, Tag ID, Checklist, Inspector, Inspection Date, Last Updated, Status, View, and Delete. Two rows are visible:

Asset	Tag ID	Checklist	Inspector	Inspection Date	Last Updated	Status	View	Delete
Fire Extinguisher 04	FireExt.SR0004	COVID-19 Disease Assessment		08-10-20	08-10-20	Open		
Fire Extinguisher 04	FireExt.SR0004	Fire Extinguishers Monthly		06-23-20	06-23-20	Open		

The screen which follows shows the status of the corrective action, and information about the inspection it came from. Use the 'View' button at the far-right to continue.

The screenshot shows the 'Corrective Action Tracking' screen. It includes a 'Return to CAT Listings' button at the top left. The main section displays details for 'Asset Name: Fire Extinguisher 04' and 'Asset Tag ID: FireExt.SR0004'. Below this, it shows 'Inspector Name', 'Inspector Email', and 'Inspect Date: 08/23/2020'. The 'Inspection Items' section contains a table with one item:

Question	Response	Assigned To	Status	View
Is the extinguisher located in its designated location?	No		Open	

The options which follow allow you to make updates to the corrective action. If an action partially remedies an issue but does not entirely resolve it (ordering a part for example) this can be made into an update using the 'Requested/Planned' Action type above the dialogue box. Choose this radio button, add text, your name, or the name of the person you may be entering the update for, the date of the change (the default is 12:00 AM of the current date, but back-dating is allowed). Choose the green 'Submit Updates' button to save the update to the corrective action. The status for the corrective action will continue to show 'Open' if using this action type.

The screenshot shows the 'Corrective Action Entry' form. It includes a 'Question' field with the text 'Is the extinguisher located in its designated location?'. Below this are fields for 'Response: No', 'Notes:', 'Monitor: No', 'Corrected: No', and 'Failed: Yes'. There is an 'Action:' section with radio buttons for 'Taken/Complete' and 'Requested/Planned'. A text area contains the text 'Purchase order opened for new fire fire extinguisher'. At the bottom, there is an 'Updated By:' field, an 'Action Date:' field showing '9/10/2020 12:00 A', and a green 'Submit Updates' button. Below the form is a 'CAT History:' section.

A popup message on your web browser will show this was successful. Choose OK to continue.

The screenshot shows a success popup message from 'g-admin.safety-reports.com'. The message says 'The CAT record has been saved.' and has an 'OK' button.

If an update resolves a corrective action entirely, and no further follow up is needed, follow the same process to get back to the edit screen, where you will administratively 'Close' the action item.

## Locations, Responsible Parties and Corrective Actions (cont.)

Choose the radio button for the 'Taken/Complete' action, add whatever text is applicable, same with updating party and date of the action. If a previous update was made on this corrective action, as in the example, it will be shown in the 'CAT History' section below. Choose the green 'Submit Updates' button to continue and close the corrective action. The status of the corrective action will show 'Closed' after updates using this action type.

**Corrective Action Entry**

Question: Is the extinguisher located in its designated location?

Response: No  
Notes:  
Monitor: No  
Corrected: No  
Failed: Yes

Action:  
@Taken/Complete/Requested/Planned  
New Extinguisher placed correctly as required.

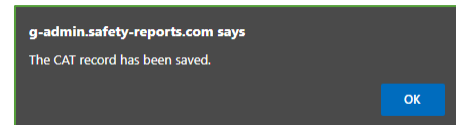
Updated By: [dropdown]  
Action Date: 9/10/2020 12:00 AM [calendar icon] [clock icon]

**Submit Updates**

**CAT History:**

Action Taken	Status	Updated By	Updated Date
Purchase order opened for new fire extinguisher	Requested/Planned	[dropdown]	9/10/2020 12:00:00 AM

A popup message on your web browser will show this was successful. Choose OK to continue.

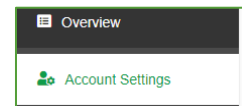


**Note:** Using Corrective Action tracking with Safety Scan enables the system to send emails from the Safety Reports to 'responsible parties,' who can then update action items assigned to them. Ensure only folks who will be involved in this process are named as Responsible Parties to prevent the recipients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

## Account Settings (And difference between Routes and Tasks)

Shown in this order due to the relationship between Responsible Parties and corrective actions, the Account Settings function allows admins to set a single email for all corrective actions for all assets, or a default responsible party for all locations.

Use the very last function at the far-left hand side of the admin screen to continue.



Set up default email and/or responsible party if desired and choose the green 'Save Account Settings' button to update the settings.

Account Email (default used for CAT) [text input]  
Default Responsible Party [None] [dropdown]  
**Save Account Settings** Cancel

Where an asset has an inspection frequency but is not setup in a scheduled route, a 'Task' is created. These cannot be individually assigned, if needed, use 'Routes' for that function.

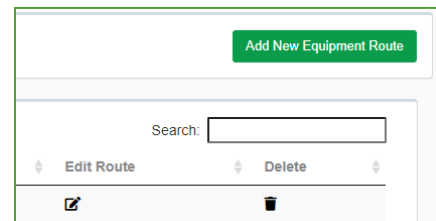
## Routes

If your organization does not want to generate tasks which can't be individually assigned, you can setup the assets in order, to be inspected one at a time in the field using the mobile app. Use the function at the far-left hand side of the admin screen.



**Note:** building routes can be done as part of the initial asset upload, or manually, as shown in the section to follow.

Adding a new Equipment route or editing an existing one gives you the same set of options. Access either by choosing 'Add New Equipment Route' or by choosing the 'Edit' link on the row of the existing route you want to edit.



The options for naming a route, assigning to a user group, frequency, shift and start date of the route are shown.

A screenshot of the 'Equipment Route Entry' form. It contains the following fields: 'Route Description:' with the value 'North Building'; 'Assigned User Group:' with a dropdown menu showing 'Lasseter'; 'Route Frequency:' with a dropdown menu showing 'Weekly'; 'Route Start Date:' with the value '09/03/2020'; and 'Shift:' with a dropdown menu showing '1st Shift'.

If choosing 'Daily' frequency, checkboxes will show days the route is scheduled to be completed for.

A screenshot of the 'Equipment Route Entry' form. It contains the following fields: 'Route Description:' with the value 'South Building'; 'Assigned User Group:' with a dropdown menu showing 'None'; 'Route Frequency:' with a dropdown menu showing 'Daily'; 'Daily Days:' with checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'; 'Route Start Date:'; and 'Shift:' with a dropdown menu showing 'NA'.


To edit other attributes of a route, adding or re-sorting assets for example, is done by choosing the 'View Item List' icon in the row of the route you want to edit.

A screenshot of a table titled 'View Item List'. The table has columns: 'Route', 'Frequency', 'User Group', 'View Item List', 'Edit Route', and 'Delete'. The table contains four rows of data: 'North Building' (Frequency: W, User Group: Lasseter), 'Eynesham' (Frequency: D, User Group: Lasseter), 'South Building' (Frequency: D, User Group: Lasseter), and 'Forest' (Frequency: D, User Group: Lasseter). Each row has a 'View Item List' icon (a magnifying glass) and an 'Edit Route' icon (a pencil).

Route	Frequency	User Group	View Item List	Edit Route	Delete
North Building	W	Lasseter			
Eynesham	D	Lasseter			
South Building	D	Lasseter			
Forest	D	Lasseter			

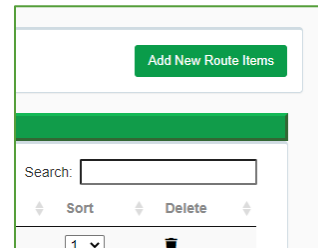
## Routes (cont.)

Sort or remove items from a route using the icons on the row of the asset.



Route Item	Building	Floor	Area	Location	Sort	Delete
Fire Extinguisher 01 - FireEx-000001	North Building			Area 1	1	
Fire Extinguisher 02 - FireEx-000002	North Building			Area 2	2	
Fire Extinguisher 03 - FireEx-000003	North Building			Area 3	3	

Use the green 'Add New Route Items' button to add assets to the route manually.



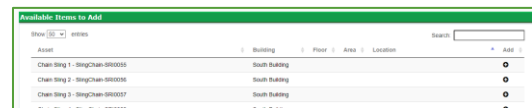
Add New Route Items

Search:

Sort Delete

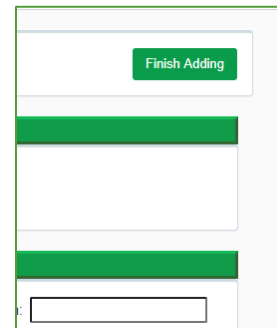
1

Use the 'plus' symbol on the row of any asset(s) you want to add to a route. You can search for assets, or use the filters shown to sort them and locate them more easily.



Asset	Building	Floor	Area	Location	+
Chain Saw 1 - SingChain-SR000001	South Building				
Chain Saw 2 - SingChain-SR000002	South Building				
Chain Saw 3 - SingChain-SR000003	South Building				
Chain Saw 4 - SingChain-SR000004	South Building				

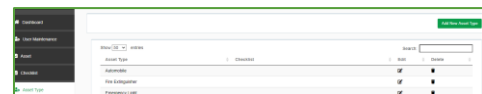
When complete, choose the green 'Finish Adding' button at the top-right.



Finish Adding

**Note:** If an asset is setup for inspection on a scheduled route, the default checklist will not automatically appear, as it does for 'Ad Hoc' inspections. See below.

To be sure the correct checklist appears for the asset on the route, go to the 'Asset Type' function at the far left-hand side as discussed earlier in this document. Choose 'Edit' on the asset type you want to pair a checklist to a frequency for.

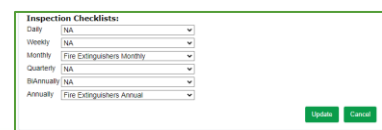


Asset Type

Asset Type:  Checklist:  Search:

Frequency:  Fire Extinguisher:  Emergency Light:

Use the drop-down menu to choose an inspection list for the frequency of the route, Fire Extinguisher in the example.



Inspection Checklists:

Daily:

Weekly:

Monthly:

Quarterly:

BiAnnually:

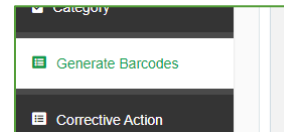
Annually:

Update Cancel

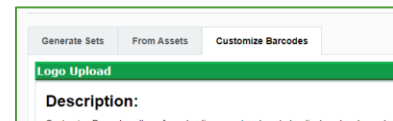
## Customizing and Generating Barcodes

The system allows for creation of custom QR codes for assets managed in the system. If utilizing existing equipment barcodes, or your own internal labeling system. You do not need to generate QR codes to use Safety Scan. Assets can be assigned to existing barcodes.

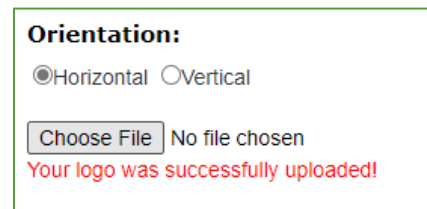
To generate new logos, use the function at the far-left of the admin screen.



If creating new QR codes, start by choosing the 'Customize Barcodes' tab from the menu options in Equipment Barcode Maintenance.

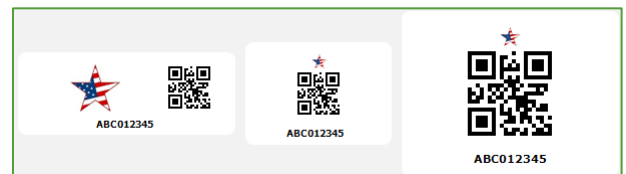
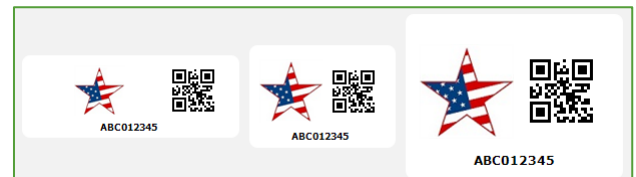


As with other Safety Reports applications, using the 'Choose File' button will launch your computer's file tree, so you can select your logo file. Choose the grey 'Save Logo' once it's been chosen to add the logo to the admin site. When complete you'll receive the red message text shown here.

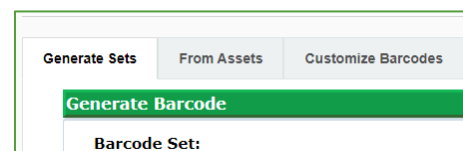


You can create QR codes for printing in three common Avery Label sizes, 5630 (1" x 2<sup>5</sup>/<sub>8</sub>" ), 6570 (1<sup>1</sup>/<sub>4</sub>" x 1<sup>3</sup>/<sub>4</sub>" ) and 6572 (2" x 2<sup>5</sup>/<sub>8</sub>" ).

Company logos can be added and aligned either horizontally, or vertically for the 2 larger labels as shown in the examples. This may become important as logos may be better suited to a particular orientation and size, when shown on the QR code mockup. Use the 'Horizontal' or 'Vertical' radio buttons for this purpose.

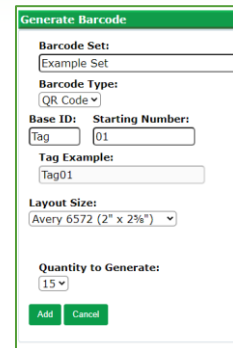


Codes can be generated from assets already in the system, or in a set, to which assets are assigned. If adding a series to be assigned later, choose the 'Generate Sets' tab from among the options shown.



## Customizing and Generating Barcodes (cont.)

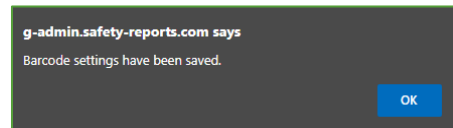
In the screen which follows, fill out the set name, Base ID, and Starting Number fields, along with the label size from among the three mentioned above. The 'Quantity to Generate' drop-down will change based on the size selected, for printing purposes. After settings are complete, choose the green 'Add' button.



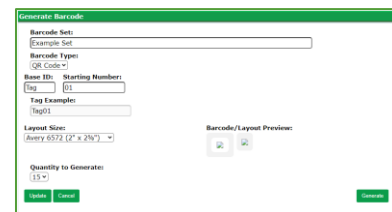
The 'Generate Barcode' form contains the following fields and options:

- Barcode Set:** Text input field with 'Example Set' entered.
- Barcode Type:** Dropdown menu with 'QR Code' selected.
- Base ID:** Text input field with 'Tag' entered.
- Starting Number:** Text input field with '01' entered.
- Tag Example:** Text input field with 'Tag01' entered.
- Layout Size:** Dropdown menu with 'Avery 6572 (2" x 2 3/4")' selected.
- Quantity to Generate:** Dropdown menu with '15' selected.
- Buttons:** 'Add' and 'Cancel' buttons at the bottom.

A popup message on your web browser will show this was successful. Choose OK to continue.

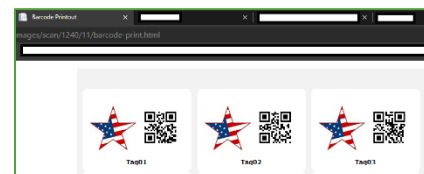


The screen will show the same settings, of the now-saved barcode set. Choose the green 'Generate' button at the bottom-right.

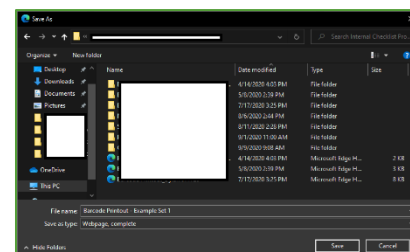


This screenshot shows the 'Generate Barcode' form with the same settings as before. It includes a 'Barcode/Layout Preview' section with two small thumbnail images of the generated barcode. The 'Generate' button is now visible at the bottom-right.

In a separate browser window, the new set of barcodes will appear. This sheet can be saved as a PDF or other file type for printing.



If desired, the file can also be saved as a group of individual images. For Windows machines, right-click to 'Save as' and use similar commands for Apple computers to get the menu and name the file accordingly.

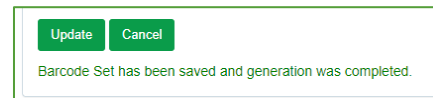
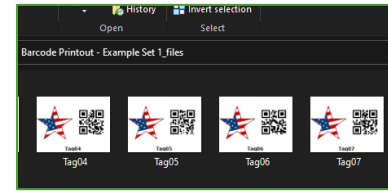




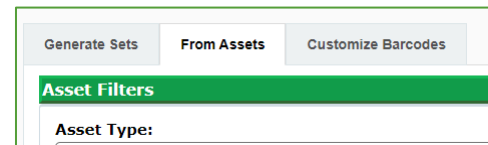
## Customizing and Generating Barcodes (cont.)

The file will be saved to your computer's file tree. You can then view individual image files of each of the QR codes generated. This is especially useful if contracting with a third party for printing, and if printing on media aside from Avery labels fed into an office printer.

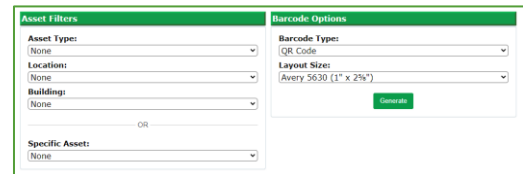
Returning to the Safety Reports screen will show the confirmation message in green text.



QR codes can also be created based on existing assets, and will show their Tag ID, instead of those assigned in a series from the previous step. Use the 'From Assets' tab from among the options shown.



QR codes can be generated for all assets, or a sub-set based on a filter, or even individually if so desired. Use the applicable drop-down menus to make your selection. Set the QR code label size using the drop-down menu to the right.



When your settings are ready, choose the green 'Generate' button to the right. As with barcode sets, generating QR codes based on assets in the system launches a new browser window. The difference will be that the Tag ID is now based on the existing assets. In this example, a single fire extinguisher.

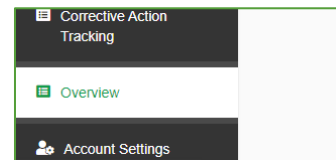


Use the same 'Save as' steps for a printable PDF and/or saving individual images as shown in the previous section.

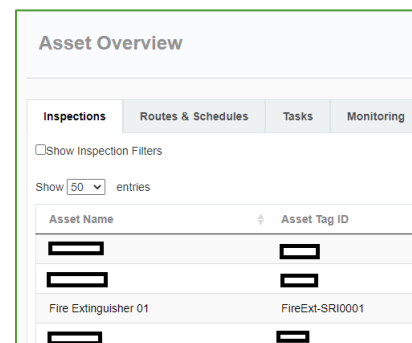
## Asset Overview

Asset Overview is the best place to review the results of inspections across all assets in the system, as well as the result of inspections such as whether all items from a route were or were not inspected, items which failed and so forth.

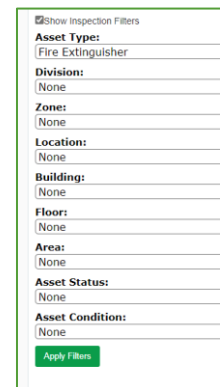
Use the function at the far-left hand side of the admin screen.



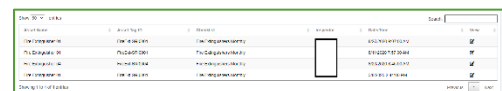
Past inspections are shown as an individual row in the overview and can be searched using the bar on the far-right; or, narrowed by use of filters. If this is desired 'check' the box next to 'Show Inspection Filters.'



Use the drop-down menus to choose inspections based on a particular filter, in the example, asset type. Choose the green 'Apply Filters' to limit the list to only your selections.

A form titled 'Show Inspection Filters' with several dropdown menus: 'Asset Type:' (set to 'Fire Extinguisher'), 'Division:', 'Zone:', 'Location:', 'Building:', 'Floor:', 'Area:', 'Asset Status:', and 'Asset Condition:'. All dropdowns except 'Asset Type' are set to 'None'. A green 'Apply Filters' button is at the bottom.

The list now shows only those asset inspections according to your selections.



Asset Name	Asset Tag ID	Inspection Date	Inspection Status
Fire Extinguisher 01	FireExt-SRI0001	2023-10-27 10:00:00	✓
Fire Extinguisher 02	FireExt-SRI0002	2023-10-27 10:00:00	✓
Fire Extinguisher 03	FireExt-SRI0003	2023-10-27 10:00:00	✓
Fire Extinguisher 04	FireExt-SRI0004	2023-10-27 10:00:00	✓

To view the details about a particular inspection, choose the 'View' icon at the far-right, in the row of the inspection you want to review.

## Asset Overview (cont.)

Results of the inspection are shown, with responses in the table, and the result if an asset 'failed' for a certain inspection item. Any photos and/or notes are shown at the bottom of the screen.

Question	Response	Note	Monitor	Cancelled	Failed
Is the extinguisher in its designated location?	Yes				
Is the date of maintenance in service or expiry?	Yes				
Are warning instructions on the label and signage?	Yes				
Is the extinguisher safe? (damaged or leaking or faulty)	Yes				
Pressure gauge or indicator in the service range?	Yes				
Are all safety labels and warning instructions in place and legible?	Yes				
Is the extinguisher in good physical condition? (No damage)	Yes				Yes
Has the extinguisher inspection tag been attached to the correct asset?	Yes				
Do all inspection findings reported to the relevant team owner?	Yes				

Photo: [Image of a person inspecting an extinguisher]

Question: Is the extinguisher in good physical condition? (No damage)?  
☐ Yes ☒ No

Other tabs show results of a particular interest. Those for Tasks, Failed Assets and so forth. Similar to the main asset overview tab, they are just more specific.

**Asset Overview**

Inspections Routes & Schedules Tasks Monitoring Failed

☐ Show Inspection Filters

Routes & Schedules tab is a slight exception from the others in how it is setup, but it is done uniquely so this can be used to show which assets were not inspected on a particular scheduled route inspection.

Route Class	Route Frequency	Assets To Inspect	Assets Inspected
Eyewash	Daily		
	09/03/2020 - 09/04/2020		
	Inspected	Not Inspected	
	3	0	

## Performance Reports

Reports based on inspections of assets can be created with the new reporting engine, using the 'Performance Reports' function at the far-left.

Overview

**Performance Reports**

Report Scheduler

Start by selecting your report type from the drop-down menu. Different report types will produce different information. Some of the information is also available in table format, using the Asset Overview.

**Select Report Type:**

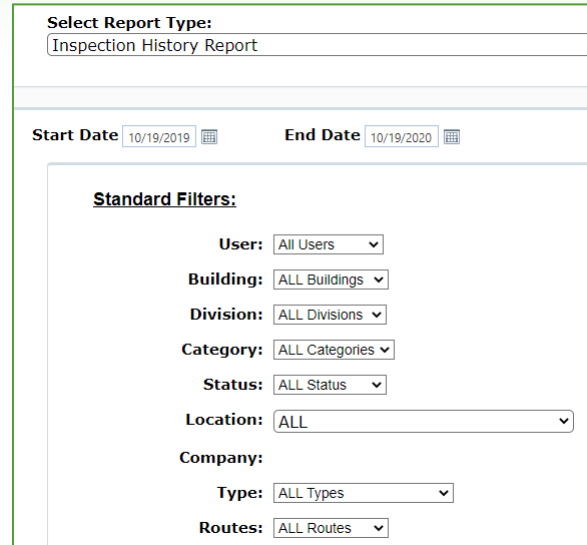
Select Report

Select Report

- Inspection History Report
- Inspection Summary Report
- Route Schedule Report
- Corrective Action Report
- Dashboard Report
- Employee (COVID) Report
- Monitor-Failed Report

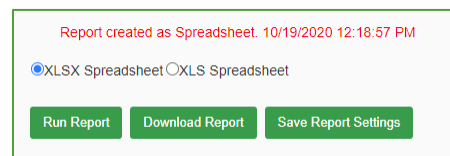
## Performance Reports

Use filters to make the report more specific, so that the report will only include results from items at a particular Location, Division etc. Or use the Start and End dates to look at a particular period, any 12 month or shorter period can be selected by using these options.



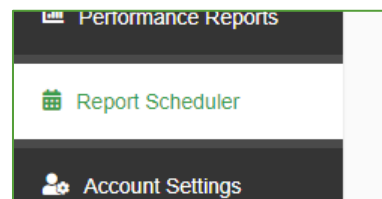
The screenshot shows a web interface for generating a report. At the top, there is a section titled 'Select Report Type:' with a dropdown menu currently set to 'Inspection History Report'. Below this, there are two date pickers: 'Start Date' set to '10/19/2019' and 'End Date' set to '10/19/2020'. Underneath the dates is a section titled 'Standard Filters:' containing several dropdown menus: 'User' (All Users), 'Building' (ALL Buildings), 'Division' (ALL Divisions), 'Category' (ALL Categories), 'Status' (ALL Status), 'Location' (ALL), 'Company' (with a sub-section for 'Type' set to ALL Types), and 'Routes' (ALL Routes).

Choose 'Run' then 'Download' to get an Excel file with your information. If a particular set of filters must be reported routinely, use the 'Save Report Settings' button to create a report with those settings specifically.



This screenshot shows the bottom part of the report generation interface. At the top, it says 'Report created as Spreadsheet. 10/19/2020 12:18:57 PM'. Below this, there are two radio buttons: 'XLSX Spreadsheet' (which is selected) and 'XLS Spreadsheet'. At the bottom, there are three green buttons: 'Run Report', 'Download Report', and 'Save Report Settings'.

Saved reports in turn can be scheduled for routine delivery via email, as with other Safety Reports products.



For help with any Setup questions not covered in the document, or any related to functions shown please contact Safety Reports support or project staff.

**For more information, contact:**

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