

SAFETY REPORTS

Safety Reports Limited Admin Features

Safety Reports offers an option which allows for addition of web administrators with limited access. This traditionally meant the 'Limited Admin' had access to only the reporting dashboard, performance and application reporting and corrective actions, and though that is still available, this has been recently updated.

Options for Limited Administrators can be chosen ala-carte. Each of the following pages gives details for the use for each administrative function on the site.

Use the links below to navigate to the applications for limited administrators for each Safety Reports app.

[Safety Inspection](#)

[Safety Training](#)

[Safety JSA](#)

[Safety Observation](#)

[Safety Incident](#)

[Safety Scan](#)

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Safety Inspection Admin Functions

Standard Menus

These functions are available to all Enterprise Inspection Account Types

Dashboard

Graphical roll up of data collected from inspections.

User Profiles

View and edit user profile information

Inspection Maintenance

Start new inspections and/or view completed inspections.

Company Maintenance

View, edit, and add new inspection companies.

Custom and Standard Checklist Maintenance

View, edit, add, hide categories/questions from the inspection checklists.

User-Defined Settings

View, edit, and add app or report attributes (custom fields, cover letter and logo, severity ratings, etc.)

Performance-Reports

Run analytics reports based off of inspection data.

Corrective Action Tracking

Manage corrective actions generated by negative observations in inspections.

Report Scheduler

View, edit, and add performance reports to be scheduled for email delivery on a reoccurring basis.

Responsible Party

View, edit, add responsible parties to the account.

Safety Documents

View, add, and edit safety documents (SDS, Policy documents etc.) for access in the app, and as report attachments.

Custom Menus

These menu functions may not apply to all account types due to setup. Contact Safety Reports Support team for more information.

Remote Sessions

Manage your inspectors' remote sessions.

Note: This feature allows for a limited number of sessions per inspector, additional sessions may come with an additional charge.

PlanGrid Settings

Manage the connection between Safety Reports and PlanGrid.

Procore Settings

Manage the connection between Safety Reports and Procore.

Safety Training Admin Functions

Standard Menus

These functions are available to all Training Account Types

Dashboard

Graphical roll up of data collected from training events.

Training Events

Start new training events and/or view completed events.

Toolbox Talks

View, edit, and add PDF documents that can be used for trainings/toolbox talks.

Manage Employees

Manage user profile attributes for Attendees and/or Trainers.

Training Tracking

View previously completed trainings/toolbox talks by use of filters for individuals, groups, or trainers.

Training Settings

Manage whether locations, projects etc. are required, and whether to allow employee deletes, and add logo.

Training Reports

Run analytics reports based off of training data.

Report Scheduler

View, edit, and add reports to be scheduled for email delivery on a reoccurring basis.

Required Trainings

View, edit, and add required training for attendees who need to periodically recertify training types (CPR, Fall Protection etc.).

Custom Menus

These menu functions may not apply to all account types due to setup. Contact Safety Reports Support team for more information.

Training Exams

Create new training exams and/or edit existing exam templates.

Note: This feature requires that your account is setup for the Training Exam feature. This is not included with normal Safety Training and is billed per training exam attendee at an additional charge.

Training Confirmations

Create and send confirmations of training for attendees to fill out via email.

Note: This feature requires that your account is setup for the Training Confirmation feature. There is no additional charge for this feature, contact the Support Team if interested.

Safety JSA Admin Functions

Standard Menus

These functions are available to all JSA Account Types

Dashboard

Graphical roll up of data collected from completed JSAs.

JSA Bank Maintenance

Allows management of JSA templates to be shared among JSA authors.

JSA Hazards Maintenance

View, edit, and add custom hazards or hide the ones already in the system.

JSA Classification Maintenance

View, edit and add Classifications if your JSAs fit a certain structure, or you need this type of division for reporting.

JSA Required Training Maintenance

View, edit, and add custom required training types or hide the ones already in the system.

JSA Reports

Run analytics reports based off of JSA data.

JSA Account Settings

Manage whether to allow authors to add custom hazards/controls, whether to require approvals, and add a logo.

JSA Maintenance

Start new JSAs and/or view completed JSAs.

JSA User Maintenance

Manage user profile attributes for Users and/or Authors.

JSA Controls Maintenance

View, edit, and add custom controls or hide the ones already in the system.

JSA PPE Maintenance

View, edit, and add custom PPE or hide the ones already in the system.

JSA Chemicals Maintenance

View, edit, and add chemicals into the system for inclusion on JSAs.

Note: using the Safety Docs feature, you can save and retrieve SDS using the JSA app, just like with Safety Inspection.

Report Scheduler

View, edit, and add reports to be scheduled for email delivery on a reoccurring basis.

Safety Observation Admin Functions

Standard Menus

These functions are available to all Safety Observation Account Types

Dashboard

Graphical roll up of data collected from completed observations.

Observation Maintenance

View and edit all submitted observations and/or forward them on for updates and closure as needed.

User Maintenance

Manage user profile attributes for Observers.

Location Maintenance

View, edit, and add locations in the system.

Category Maintenance

View, edit, and add custom categories or hide the ones already in the system.

Cause Maintenance

View, edit, and add custom causes or hide the ones already in the system.

Responsible Party Maintenance

View, edit, add responsible parties to the account.

Observation Reports

Run analytics reports based off of observation data.

Report Scheduler

View, edit, and add reports to be scheduled for email delivery on a reoccurring basis.

Observation Settings

Manage whether to show and/or require items for observers in the app (Positive/Negative schema, Causes, Actions Taken, Geotagging etc.)

Safety Incidents Admin Functions

Standard Menus

These functions are available to all Safety Incident Account Types

Dashboard

Graphical roll up of data collected from completed incidents.

Note: some information on the dashboard is dependent on Entity Management.

OSHA 301

Use this function to create an OSHA 301 First Report form based on existing incidents for recordables.

User Maintenance

Manage user profile attributes for Incident Authors.

Conditions Maintenance

View, edit, and add custom conditions or hide the ones already in the system.

Entity Maintenance

Manage information, such as NAICS data, Executive contacts, etc., for Entities in the system.

Note: typically, this is either departments within an organization that have different OSHA reporting needs or are individual clients if being used by consultants.

Account Settings

Manage account information (Logo, Establishment Name, CC's, User Defined Fields, etc.)

Report Scheduler

View, edit, and add reports to be scheduled for email delivery on a reoccurring basis.

Incidents

View and edit all completed Incidents (helpful for adding incident information which was not available to the author, such as injury treatment).

OSHA 300 Log

Use this function to create new or manage existing OSHA 300 Logs, (organized by year and by Entity).

Note: this function depends on having completed incidents having been made into an OSHA 301.

Behaviors Maintenance

View, edit, and add custom behaviors or hide the ones already in the system

Location Maintenance

View, edit, and add locations for Incidents.

Responsible Party

View, edit, add responsible parties to the account.

Incident Reports

Run analytics reports based off of incident data.

Safety Scan Admin Functions

Standard Menus

These functions are available to all Safety Scan Account Types

Dashboard

Graphical roll up of data collected from completed inspections.

User Maintenance

Manage user profile attributes for Inspectors.

Asset

View and add assets to the system, and/or edit asset attributes.

Checklist

View, edit, and add checklist(s) and content.

Asset Type

View, edit, and add asset types.

Location

View, edit, and add locations.

Responsible Party

View, edit, add responsible parties to the account.

Route

View, edit, and add routes.

Building, Floor, & Area

View, edit, and add Buildings, Floors, and Areas.

Division

View, edit, and add Divisions.

Zone

View, edit, and add Routes for inspection that place Assets in a sequence.

Category

View, edit, and add Categories.

Generate Barcodes

Manage barcode settings and generate codes in a sheet and/or as individual files to be printed and placed on assets.

Corrective Action Tracking

Manage corrective actions generated by negative observations in inspections.

Overview

View results of inspections, including failed items and whether items assigned to Routes have been scanned or not for a given time period.

Performance Reports

Run analytics reports based off of inspection data.

Report Scheduler

View, edit, and add reports to be scheduled for email delivery on a reoccurring basis.

Account Settings

Manage misc. account information (Account Email and Default Responsible Party.)

Safety Forms Admin Functions

Standard Menus

These functions are available to all Safety Forms Account Types

Dashboard

Graphical roll up of data collected from completed forms.

Forms Maintenance

View, edit, and add form templates to the account.

User Maintenance

Manage user profile attributes for Authors.

Location/Customer

View, edit, and add locations.

Account Settings

Manage account information (Account Name, Address, etc.)

Completed Forms

View completed forms and retrieve hard-copies in PDF or Excel formats.

Custom Menus

These menu functions may not apply to all account types due to setup. Contact Safety Reports Support team for more information.

Responsible Party

View, edit, add responsible parties to the account.

Corrective Action

Manage corrective actions generated by negative results in completed forms.

For more information, contact:

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