

Safety Manager Version 4.1 – User Guide

Safety Manager is a complex, relational database developed with *Microsoft Access*.

While you do not need to read this manual in full before using the program, you should familiarize yourself with what is in the manual for later reference.

!? My Computer won't let me Install the program
RIGHT Mouse Click on the Installation File you downloaded to your computer and click
Run as Administrator

OR, if you are working from a company owned computer, your Network Administrator may have blocked your ability to install new programs ... see him and get this changed.

Requirements

System Requirements:

Windows 2000, XP or Vista

Program Requirements:

Microsoft Access 2002 for Version 4.1-02

Microsoft Access 2007 for Version 4.1-07

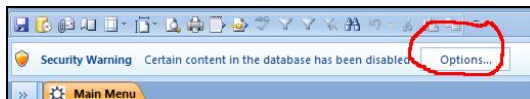
Installation

Note

Safety Manager MUST be installed in C:\Safety Manager folder. If you did not use the "Typical" installation option and installed it in any other folder, either move both Safety Manager files to that folder or Uninstall Safety Manager and Re-install using the default location.

Starting Safety Manager

SECURITY WARNING: When you Start SAFETY MANAGER, you will be presented with a Security Warning in a bar, above the Main Menu Tab, similar to the following or a Popup Box:



WHY is this HAPPENING: In a effort to protect your computer, *Microsoft* has provided this warning to protect you against UNWANTED codes. Even though all codes have been developed in *Microsoft Access*, we cannot prevent this and still allow you to customize SAFETY MANAGER with *Microsoft Access*.

WHAT TO DO: Click on "Options" or similar button, when it shows and then "Enable" or "Allow". You can PREVENT THIS FROM HAPPENING each time you open SAFETY MANAGER by using the directions found in the last section of this Manual. If you have a Company Network Administrator see them for help.

Terms you should know ... preventing future confusion

MODULE: The various parts of *Safety Manager*, such as Employees, Accidents, Incidents, Corrective Actions, etc. Open the Modules by clicking on the large buttons on the Main Menu, which is the opening screen that you see when you start Safety Manager.

FIELD: A Field is a SINGLE data block or box ... every time you enter data in a box you are filling in a Field. Groups of Fields make up a Record.

RECORD: All the data fields pertaining to a SPECIFIC person, event or equipment. When you open a Module Form, you generally are viewing the first record of that Module

FORM: Forms are data entry screens. You can view one Record at a time. When you open a Form, you will see the data for the FIRST Record you entered, or a BLANK Form if you have not used this Form before.

To **ADD a NEW Record** – Click on the ADD button at the top of the Form

To **DELETE** only the Record you are viewing, click the DELETE Button at the top of the Form

To **SEE OTHER** Records – Use the small Navigation Buttons at the bottom of the Form OR use the “PageUp” and “PageDown” keys on your keyboard. SOME Computer Keyboards have PageUp and DownKeys that are shared with the numbers keys on the NUMBER KEY PAD, so be sure the “NUM Lock” key is not activated before using the PageUp and PageDown keys

To **CLOSE a Form** – Click on the [X] with the RED background or the CLOSE Button at the top of the Form. When you CLOSE a Form all your Data is automatically saved.

REPORT: a printable data sheet which pulls information from the Forms. If you attempt to open a report and you have not entered any data on the related Form, you will get a message that says, “No Data for this Report” ... if you click OK, the Blank Report will open

TOOLBAR

Safety Manager uses the default Microsoft Access toolbars. You can customize or create new toolbars. See the Microsoft Access HELP files for more information and information about the program tools.

OK, Here We Go!

After you Start Safety Manager for the first time, you need to SETUP a few areas

Setup Step 1: Read the **LICENSE AGREEMENT**

Be sure you have read, understand and agree to the License Agreement and Disclaimer. We don't want you to get in trouble with the FBI.

Setup Step 2: SETUP COMPANY INFORMATION: Safety Manager uses your Company Information throughout the program. This information is used in many other modules and reports, such as Accident Reports, OSHA 301, OSHA Log and others. Just type it in once and the information will be shared

automatically wherever needed so you only have to provide this information once. You may change the Company SETUP information anytime.

IMPORTANT NOTES about entering DATA

MANUALLY Entering Dates: YOU MUST use the following format: DD / MM / YY, including typing the / (slash marks). If you get an error message, delete the date entry and retype the entire date.

ENTERING DATA: Data is anything you type into a box. Some data boxes have “Drop Down” selections from which you can pick - you will see a small down arrow on the right side of the box. You are NOT limited to only the pre-listed choice, you can type in any data and it will be saved with the record you are working on but will not be added to the selection list for other records. You can even add text to a pre-listed choice. EXAMPLE: In the Accident Module, body parts are listed, such as “Finger”. You can add “Right Ring” so the entire entry reads “Right Ring Finger”.

SAVING DATA: When you CLOSE any Form, all your data is saved automatically.

- a. **Fill in all COMPANY** You can change the information any time later on if you need to
- b. **Fill in the DEPARTMENT LIST** – As you type in the “Department” data box, another blank box will appear below it for you to enter the next department. This type of action occurs in many of the Safety Manager forms. By entering the Department Names here, you will not have to retype them into other forms. You can enter an unlimited number of departments. You can add more departments anytime.
- c. **Fill in the JOB TITLE List.** This list is used to prevent you from having to retype Job Titles in other forms. You can enter an unlimited number of Job Titles and you can add more Job Titles anytime.

!! WARNING: Do NOT delete ANY Department, or Job Title ... you may lose important data required by OSHA !!

Setup Step 3: SETUP TRAINING INFORMATION: This is the module in which you type any recurring employee training. You are not limited to just safety training topics. Safety Manager uses the Training Topics and Re-Training Frequencies - how often you want to do refresher training on the same topic – to automatically create various reports that tell you what and when re-training is due.

In a situation where you have training that does not require refresher training, use a topic title such as “General/Orientation” since, even though “Orientation” training does not reoccur, it is substantially similar in content to General Safety training that should have a refresher training frequency.

Alternately, you can use the “Training Event Planner” to schedule one-time training events. However this will not tie the event to any specific employee and will, therefore, not show up on any employee related reports. The Training Events DO show up on the “Completed” and “Uncompleted” Training EVENT reports.

!! WARNING: Do NOT delete ANY Training Topic ... you may lose important data required by OSHA !!

Setup Step 4: SETUP EMPLOYEES MODULE: You do not NEED to enter data about all your employees now to use many of the Modules, HOWEVER, several Modules will not work UNLESS you have data about the specific employee entered in the Employee Module.

Note: Modules that need employee data include:

- a. Accident Module & Reports
- b. Training Reports
- c. Employee Reports
- d. CDL Reports
- e. Chemical Exposure
- f. Respirator User Report

Click on the large button that is labeled EMPLOYEES

!! WARNING: Do NOT delete ANY Employee you have entered in the program ... you may lose important data required by OSHA !!

General Info Tab

Information that identifies a specific employee, his department, job title, address, etc

NOTE: There are 2 check boxes you need to be aware of:

[X]- Training not required for this employee

Checking this box will prevent this employee from showing up on various Training Reports ... check ONLY if the employee truly does not require ANY training [a VERY unusual circumstance]. Uncheck the box if, at a later date, they do require training.

[X]- Inactive Employee

Using this box will allow you to keep IMPORTANT Government REQUIRED information (such as accident reports and OSHA Log entries) but keep inactive (fired, laid off, etc) employees from showing up on active records. Use this Check Box instead of deleting the employee information.

Safety Training Tab

On this TAB you can select the training topic required for the specific employee. If you do not have a date they were Last Trained, click the Initial Training Needed box. This will place the employee's training needs on the "Initial Training Needed Report". After initial training, un-check the box to clear that training topic for that employee from the report.

Respirator Fit Test Tab

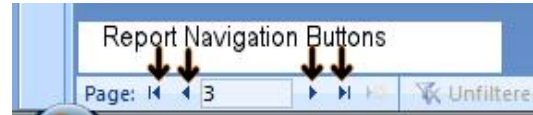
In this Tab you record Respirator Fit Test information required by OSHA. This information is transcribed automatically to the "Respirator Fit Test Report"

Accident Data Tab

This Tab displays a summary of any accidents you have recorded for this employee. You cannot enter or change data in this Tab. It is meant for a quick look at injury and illness accidents this employee has had.

Navigating through Print Reports

To navigate between Print Reports – Use the Navigation Buttons at the LEFT BOTTOM of the Report screen OR use the “PageUp” and “PageDown” keys on your keyboard.



NOTE: Some Computer Keyboards have PageUp and DownKeys that are shared with the numbers keys on the NUMBER KEY PAD, so be sure the “NUM Lock” key is not activated before using the PageUp and PageDown keys.

Using the Email Tool

This function allows you to email REPORTS to other people. An EMAIL CLIENT PROGRAM such as Microsoft Outlook, Outlook Express, or Windows Mail must be setup on your computer for this function to work. Only REPORTS (pages with white backgrounds) should be emailed. To email a report, find the report and then click on the E-Mail button on the toolbar.

After clicking on the EMAIL TOOL, a POPUP will allow you to select the FORMAT for the Email Attachment (Report).

For the FORMAT you select to be read by the Recipient of your EMAIL, they must have the correct program installed on their computer. The following 2 Formats are recommended

HTML – This format will make your email attachment look exactly like what you saw when you emailed the report. Any computer with a Web Browser can open this type file.

RICH TEXT will preserve most of the formatting of the report. This format can be opened with Microsoft Word or other Word Processing Programs.

Selecting any other choice, than those listed above, may PREVENT you're report from being received since many email security settings do NOT ALLOW receiving Emails with attached Excel or Access files.

TO SEND your email, you MAY have to open your email program and Click on SEND/RECEIVE just clicking on SEND on the email form may simply place it in your EMAIL OUTBOX and not send it until you open your Email Program.

Using the FILTER Tools

To find one or more specific records you can use a filter. A filter limits the data you see based on the filtering you employ. The best way to learn how filters work is to play with them. You won't lose any data. *Microsoft Access HELP Files have an extensive amount of information about Filters.*

About Filters

When filters are applied, only records that contain the values that you are interested in are able to be seen, such as all the employees in one department. The rest are hidden until you remove the filter or close and re-open the Form. Filters are easy to apply and remove. In Safety Manager, common filters are built into every view that displays data. Just RIGHT Mouse Click on any Data Box that has information and you will see the type of Filters available for that type of data.

TOGGLE FILTER. You can revert to the unfiltered view by removing the filters. Removing a filter temporarily removes it from the view, so that you can switch back to the original, unfiltered view. In the TOOLBAR you can click TOGGLE FILTER Tool to switch between filtered and unfiltered views.

You can also permanently remove a filter from a view by removing the filter

Applying Filters

To APPLY a Filter – RIGHT click in a Field You will see all the Filters available for the type of data that is used in the Field box.

CUSTOMIZING SAFETY MANAGER

Unless you are experienced in using *Microsoft Access*, we recommend you do not attempt customization.

If you customize Safety Manager, **DO NOT download any upgrades**, you will lose all changes you have made.

Safety Manager is a “Split” database

PREVENTING THE SECURITY ALERT When you start Safety Manager

If you are not comfortable with how to change settings on your computer, you can either ask someone who is knowledgeable and whom you trust to make the following changes for you OR you can leave things as they are and click-through the **Security Warning** each time you open **Safety Manager**.

To PREVENT the WARNING each time you open **Safety Manager**, follow the procedure below.

Windows VISTA Operating System

1. Close **Safety Manager**, then re-open – so you see the **Security Warning**
2. Click the **OPTIONS** Button on the Security Warning bar
3. Click **ENABLE this content** - DO NOT click OK yet
4. Click on the blue text **Open the Trust Center** - you find this in the lower left corner of the open popup box.

5. In the new popup box, click on *Trusted Locations*
6. Click on *Add New Location*
7. Use the Browse button to locate the folder that has **Safety Manger** – it SHOULD be in the “c:\\Program Files\\Safety Manger” folder if **Safety Manager** was properly installed and not moved.
8. Select the **Safety Manager** FOLDER – not the program.
9. Click OK on the current Window – this closes this popup
10. Click OK on the *Trust Center* popup window
11. Be sure *Enable this Content* option is selected, then Click OK on the *Microsoft Security Options* popup window.

Warning!! Be advised that ANYTHING you later put in the **Safety Manager** folder will be authorized to Run without Security Warnings – we highly advise against putting anything in this folder except **Safety Manager**