

# SAFETY MANAGER

QUICK GUIDE

# CONTENTS

<b>3</b>	<b>.....</b>	<b>Dashboard</b>
<b>4</b>	<b>.....</b>	<b>How to set up your organisation structure</b>
<b>6</b>	<b>.....</b>	<b>Risk Assessments</b>
<b>7</b>	<b>.....</b>	<b>Audits</b>
<b>9</b>	<b>.....</b>	<b>Incidents</b>
<b>11</b>	<b>.....</b>	<b>Accidents</b>
<b>13</b>	<b>.....</b>	<b>Smartforms</b>

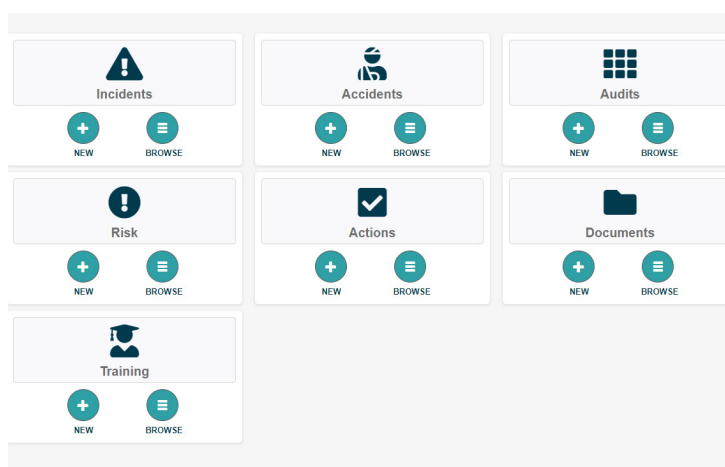
# SAFETY MANAGER

## QUICK GUIDE

### Dashboard

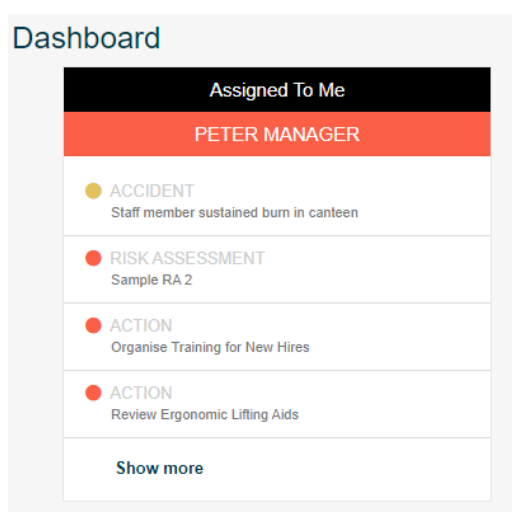
#### Step 1

Access all modules assigned to your organisation.



#### Step 2

See all tasks and actions assigned to you at a glance.



# SAFETY MANAGER

## QUICK GUIDE

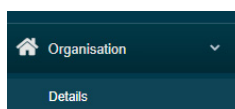
### How to set up your organisation structure and add members

#### Step 1

Log in to Safety Manager

#### Step 2

Select "organisation" from the menu on the left

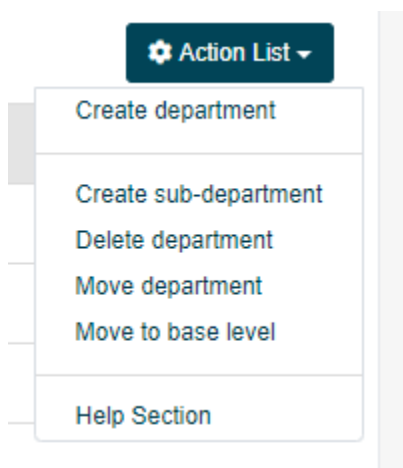


#### Step 3

Create departments by selecting this option on the dropdown menu - then click [+ Department](#)

#### Step 4

On the right hand side of the screen there is an Action List. Here you can manage departments by creating sub departments. There is also a Help section here with useful tips.



# SAFETY MANAGER

## QUICK GUIDE

### How to set up your organisation structure and add members

#### Step 5

You can add members by selecting this option from the dropdown menu, then click [+Member](#)

**Add Member** ✕

**Email\***

**First Name\***  **Last Name\***

**Administrator**

Is this member an administrator for the organisation?

**Group (optional)** ?

**Supervisor (optional)**

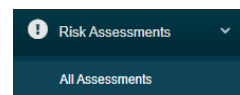
# SAFETY MANAGER

## QUICK GUIDE

### Risk Assessments

#### Step 1

Access the Risk Assessment module from the dropdown menu on the left of your dashboard.



#### Step 2

To start a new Risk Assessment click the **+Create** button

#### Step 3

Enter your title, select the template that you wish to use and click create. Fill in the required fields

Create Risk Assessment
✕

**Risk Title\***

**Template\***

**Assessor\***

Cancel + Create

#### Step 4

You can save the Risk Assessment as a draft, which will allow you to go back and edit. The status will appear as **New**. Click view and the select **Edit Assessment**

#### OR

You can select save and publish which will complete the Risk Assessment. The status will then appear as **Published**. The only option to make changes once published, is to create a new revision of the Risk Assessment by clicking **New Revision**.

#### Step 5

Once complete you can view the Risk Assessment in PDF format.

Sample RA



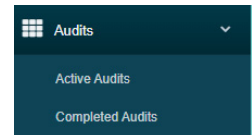
# SAFETY MANAGER

## QUICK GUIDE

### Audits

#### Step 1

Access the Audit module from the dropdown menu on the left of your dashboard.



#### Step 2

To record a new Audit click [+Audit](#) button.

#### Step 3

Enter your title, select the template that you wish to use and click create.

**Create Audit** ✕

**Audit Title\***

**Template\***

**Auditor\***

**Scheduled On\* ?**  **Recurrence ?**

#### Step 4

Once complete you can view the Audit in PDF format.

Audit Date	Status	Score	Completed	
2020-03-30	Completed	100%	2020-03-30	<a href="#">View</a> 

#### Covid-19 Preparedness

[View Audit](#)

[Re-Open Document](#)

# SAFETY MANAGER

## QUICK GUIDE

### Audits

#### Step 5

Active Audits lists all ongoing Audits with the next review date.

AGH Pharma Ltd

Title  Department  Auditor  Status

Template

#	Title	Template	Site	Auditor	Audit Date	Status	Next Recurrence Date

#### Step 6

Completed Audits lists all closed Audits

Completed Audits

AGH Pharma Ltd

Title  Department  Auditor

Template



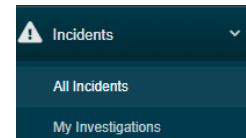
# SAFETY MANAGER

## QUICK GUIDE

### Incidents

#### Step 1

Access the Incident module from the dropdown menu on the left of your dashboard.



#### Step 2

To start a new Incident report click the **+ Incident** button

#### Step 3

Enter your title, select the template that you wish to use and click create.

**Create Incidents** ✕

**Title\***

**Template\***

**Date**

Cancel + Create

#### Step 4

Once complete you can view the Incident in PDF format.

Incident Date	Completed Date	
2020-03-26		

Assign Investigator
 View PDF
 Re-Open Report
 Start Investigation

Q Details
 Actions
 Files

**Details**

<b>#</b>	IC1
<b>Title</b>	Exit Sign fell from wall over reception door
<b>Description of incident</b>	While some staff were leaving the building at lunchtime, the exit sign fell from the wall
<b>Site</b>	AGH Pharma Ltd
<b>Type</b>	Safety Incident
<b>Incident Date</b>	2020-03-26
<b>Incident Time</b>	13:00

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### Incidents

#### Step 5

All Incidents: view a full listing of recorded incidents. This lists reporter, assignee and co-ordinator of the accident report, along with the current status i.e: shows investigation "in progress" or if the investigation is "complete".

Incidents [+ Incident](#)

AGH Pharma Ltd

Title  Department  Assignee  Status  [Advanced Search](#)

[Reset](#) [Search](#)

Showing 1-1 of 1 item.

#	Title	Template	Site	Reporter	Assignee	Coordinator	Status	Incident Date	Completed Date	
IC1	Exit Sign fell from wall over reception door	Incident Report Default	AGH Pharma Ltd	PM	PM	PM	Incident Reported	2020-03-26		<a href="#">View</a> <a href="#">Edit</a>

#### Step 6

My Investigations: this shows all Incidents currently assigned to you to investigate.

My Investigations

AGH Pharma Ltd

Title  Department  Status  [Advanced Search](#)

[Reset](#) [Search](#)

Showing 1-1 of 1 item.

#	Title	Template	Site	Reporter	Assignee	Coordinator	Status	Incident Date	Completed Date	
No results found.										

#### Step 7

Coordinating: shows all Incidents which you are assigned as coordinator.

Coordinating

AGH Pharma Ltd

Title  Department  Status  [Advanced Search](#)

[Reset](#) [Search](#)

Showing 1-1 of 1 item.

#	Title	Template	Site	Reporter	Assignee	Coordinator	Status	Incident Date	Completed Date	
IC1	Exit Sign fell from wall over reception door	Incident Report Default	AGH Pharma Ltd	PM	PM	PM	Incident Reported	2020-03-26		<a href="#">View</a> <a href="#">Edit</a>

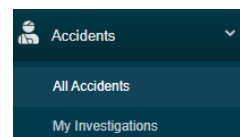
# SAFETY MANAGER

## QUICK GUIDE

### Accidents

#### Step 1

Access the Accident module from the dropdown menu on the left of your dashboard.



#### Step 2



To start a new Accident report click the **+Accident** button

#### Step 3

Enter your title, select the template that you wish to use and click create.

#### Step 4

Once complete you can view the Accident report in PDF format.

Accident Date	Completed Date	
2020-03-23		<b>View</b>  

Staff member sustained burn in canteen

**Investigate** **View PDF** **Re-Open Document**

🔍 Details  Actions 

# SAFETY MANAGER

## QUICK GUIDE

### Accidents

#### Step 5

All Accidents: view a full listing of recorded incidents. This lists reporter, assignee and co-ordinator of the accident report, along with the current status i.e: shows investigation "in progress" or if the investigation is "complete".

AGH Pharma Ltd

Title  Department  Assignee  Status

Advanced Search ▾

Showing 1-1 of 1 item.

#	Title	Template	Site	Reporter	Assignee	Coordinator	Status	Accident Date	Completed Date	
A12	Staff member sustained burn in canteen	Accident Report Default	AGH Pharma Ltd				Investigation In Progress	2020-03-23		

#### Step 6

My Investigations: this shows all Accidents currently assigned to you to investigate.

My Investigations

AGH Pharma Ltd

Title  Department  Status

Advanced Search ▾

Showing 1-1 of 1 item.

#	Title	Template	Site	Reporter	Assignee	Coordinator	Status	Accident Date	
A12	Staff member sustained burn in canteen	Accident Report Default	AGH Pharma Ltd				Investigation In Progress	2020-03-23	

#### Step 7

Coordinating: shows all Accidents which you are assigned as coordinator.

Coordinating

AGH Pharma Ltd

Title  Department  Status

Advanced Search ▾

Showing 1-1 of 1 item.

#	Title	Template	Site	Reporter	Assignee	Coordinator	Status	Accident Date	
A12	Staff member sustained burn in canteen	Accident Report Default	AGH Pharma Ltd				Investigation In Progress	2020-03-23	

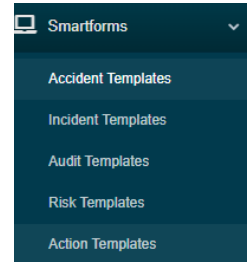
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### Smartforms

#### Step 1

Access the Smartforms module from the dropdown menu on the left of your dashboard.



#### Step 2

To start a new template click the **+Template** button

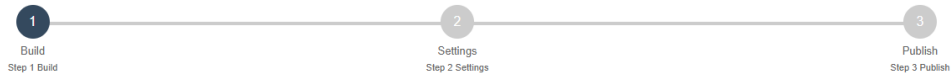
#### Step 3

Enter your title, select the template that you wish to use and click create.

A screenshot of a 'Create Template' form. The form has a dark header with the text 'Create Template'. Below the header, there are three input fields: 'Template Title\*' with the value 'Sample Accident Report', 'Type\*' with the value 'Report', and 'Description' with the placeholder text 'Enter template description'. At the bottom of the form, there are two buttons: 'Cancel' and '+ Create'.

#### Step 4

Follow the three steps as outlined below:



# SAFETY MANAGER

## QUICK GUIDE

### Smartforms

#### Step 5

Drag options from the left hand side menu over to the right in order to add to your form, in the picture example here we've added Radio Buttons (Horizontal).

#### Step 6

Then adjust your template settings in order to show/hide fields if desired.

#### Step 7

#### Publish

Choose one of the options below.

Save As Draft **Save As Draft:** This will save the template as a draft so you can edit it later.

Finalise **Finalise:** This will save the template as finalised but will not make it available in your organisation.

Publish **Publish:** This will finalise & publish the template. A published template will be available for use in your organisation.

Publish As Default **Publish as Default:** This will finalise & publish the template. A published as default template will be available for use in your organisation and will be defaulted as the first option selected when choosing a template.

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