

# SafetyWise Documentation

**Version 6**

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## Login Window

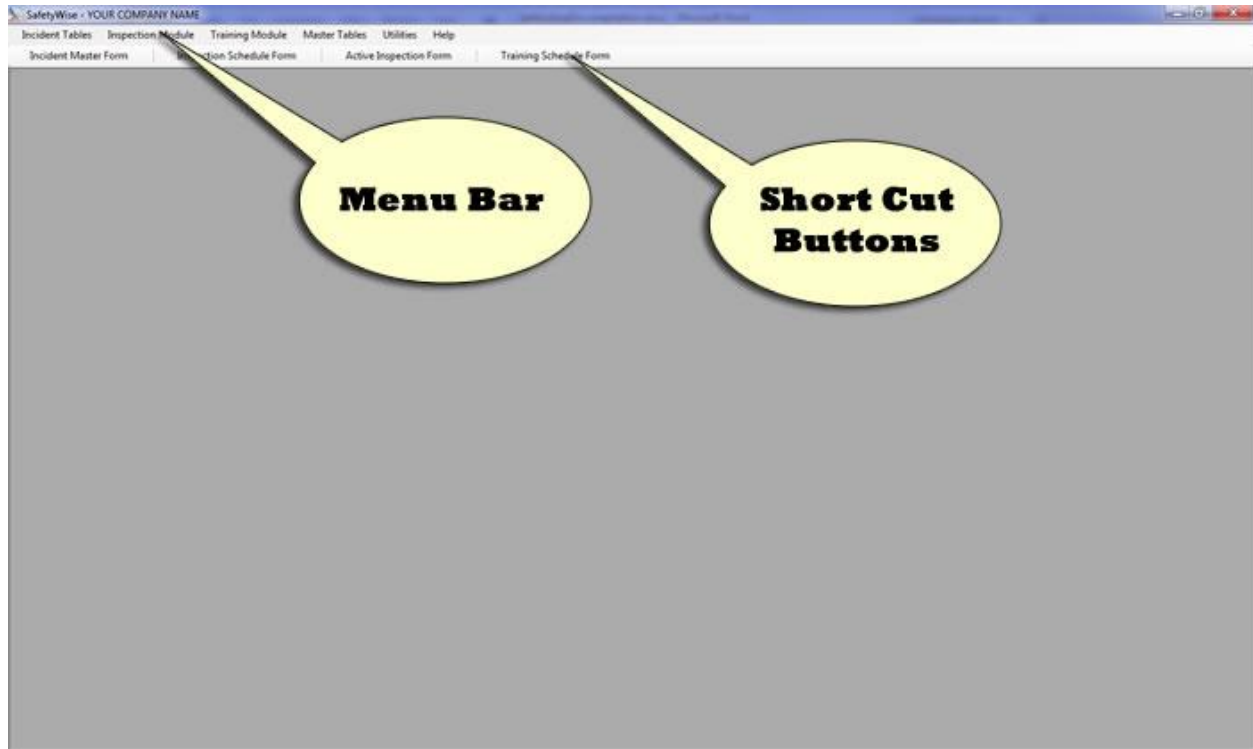
The SafetyWise Login Window is displayed below. You must enter the Microsoft SQL Server Instance name in the SQL Server Name box. Normally, the instance name is the name of the computer where SQL Server is installed.



SafetyWise contains a complete security system. If you have created security in SafetyWise, you are required to enter the User Name and Password. If you have not created security, you can click on the OK button to login.

## SafetyWise Desktop

The SafetyWise Desktop is displayed below.



The menu appears at the top of the window. This menu is used to access all of the other windows in the system. If you click on the Master Tables Menu Option the menu will drop down.

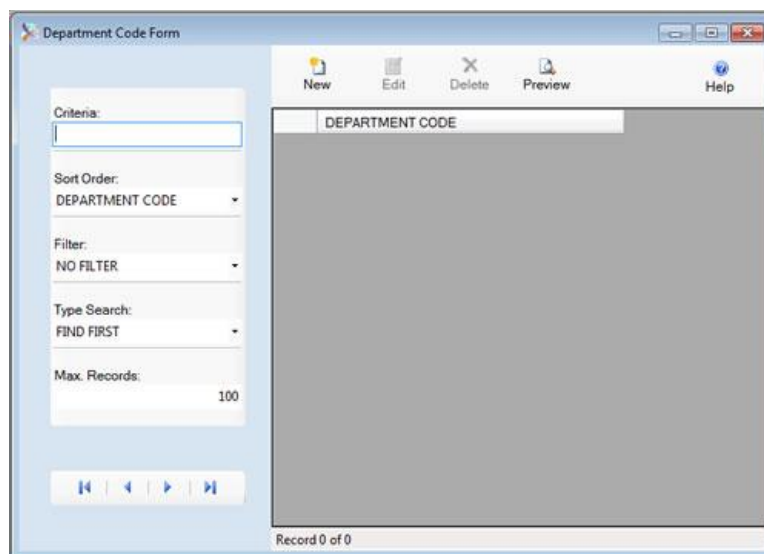
Below the menu bar is the Shortcut Bar. It contains buttons that allow you to quickly display the most common forms, like the Incident Master Form or the Active Inspection Form.

## Forms

All of the forms in the SafetyWise System have a number of controls in common. The forms are displayed below and the controls on the forms are described. These same controls appear on virtually all of the forms.

### Empty Browse Form

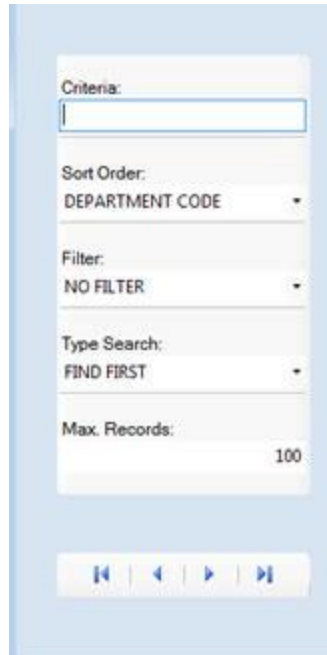
The Assembly Code Table is displayed below. This is the way the form is displayed when first selected from the menu. No assembly codes are displayed. The cursor is in the Criteria Box at the top of the left toolbar. You can click on the ENTER key to display existing Assembly Codes. You can type a few letters in the criteria box and then press enter to display the first code beginning with what you entered as criteria.



The screenshot shows a software window titled "Department Code Form". The window has a menu bar with "New", "Edit", "Delete", "Preview", and "Help". On the left side, there is a toolbar with several controls: a "Criteria:" text box with a cursor, a "Sort Order:" dropdown menu set to "DEPARTMENT CODE", a "Filter:" dropdown menu set to "NO FILTER", a "Type Search:" dropdown menu set to "FIND FIRST", and a "Max. Records:" field set to "100". Below these controls are four navigation buttons (first, previous, next, last). The main area of the window is a large, empty table with the header "DEPARTMENT CODE". At the bottom of the window, it says "Record 0 of 0".

### Browse Search Control

The search control is displayed below.

The image shows a vertical search control interface. At the top is a text input field labeled 'Criteria:'. Below it is a dropdown menu labeled 'Sort Order:' with 'DEPARTMENT CODE' selected. Underneath is another dropdown menu labeled 'Filter:' with 'NO FILTER' selected. Below that is a third dropdown menu labeled 'Type Search:' with 'FIND FIRST' selected. At the bottom of the search criteria section is a label 'Max. Records:' followed by the number '100'. Below the entire search criteria section is a horizontal bar containing four navigation icons: a double left arrow, a single left arrow, a single right arrow, and a double right arrow.

The Criteria Box is at the top of the control. The cursor appears in this box by default. The user should type in the first few characters of the code they are searching for. The user should then hit the enter key. The Browse Form will fill with records beginning with the closest matching code.

There are several options to control how the search control works.

- **Sort Order:** The user can change the sort order of the control. The sort order determines what should be typed in the Criteria box. For example, if the sort order is Inspection Date order, then the user should in a Date. If the sort order is Department Code order, the user should type all or part of a Department Code.
- **Filter:** Various filters are available depending on the form. NO FILTER means that all records will be displayed. If the filter is set to OPEN on the Incident Master Table, then only open incidents will be displayed.
- **Type Search:** The most common type search is a FIND FIRST search. When the search takes place the first record beginning with what was typed in the criteria box will be displayed. The rest of the records will be displayed in the order specified by the sort order control. An EXACT search means that the user must type exactly what they are looking for in the criteria box. Then records matching that will be displayed. For example, on the Incident Master Form, the sort order could be by Incident ID and the type search could be EXACT. The user would then type a complete Incident ID and press enter. Only the specified Incident would be displayed. A CONTAINS search is a special search where records that contain the characters as entered in the criteria box will be displayed. For example, in the Training Schedule Table, the sort order could be set to Leader Name order, and the type search could be set to CONTAINS. The user could then



type all or part of a Leaders name and press enter. Any classes where the Leaders name contains the characters typed will be displayed.

- **Max. Records:** The Max Records determines how many records will be retrieved in a search. For example, you may have 1000 Inspections scheduled. By default the Max. Records is set to 100. When you do a search, 100 records will be retrieved. You can then scroll through the records to find the one you are looking for. You can increase or decrease the Max. Records to any number you desire. However, the higher the number, the longer the search will take.
- **Move Record Buttons –** At the bottom of the search control, 4 buttons appear that allow you to move from one record to another. The first button on the control will move to the first record. The second button moves to the previous record, if there is one. The third button moves to the next record, if there is one. The fourth button moves to the last record. You can also use the scroll bar on the right side of the browse window to move to records. Then simply click on the desired record to select it.

## Browse Form with Records

The browse form with records is displayed below. There is a toolbar above the grid listing codes.

Department Code Form

Criteria:

Sort Order: DEPARTMENT CODE

Filter: NO FILTER

Type Search: FIND FIRST

Max. Records: 100

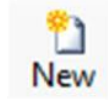
Navigation buttons: First, Previous, Next, Last

Toolbar: New, Edit, Delete, Preview, Help

DEPARTMENT CODE
ADMINISTRATION
OPERATIONS
UNKNOWN
WAREHOUSE

Record 1 of 4

Click on the New Button



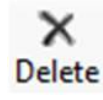
to add a new code or click on an existing code and click on the

Edit Button

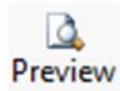


to change the code. You can also double click on an item in the list to edit

it. Click on the Delete Button



to delete the selected code. Click on the Preview Button



to preview a report on your computer screen. You can send the report to the printer from the preview window.

## Edit Form Mode

The form is displayed in Edit Mode below. You can change any of the information for the

selected code. Once the changes are complete click on the Save & New Button



to

save the changes and add a new record, or click on the Save Button



to save your changes

and return to the Browse Form, or click on the Undo Button



to lose the changes.

Department Code Form

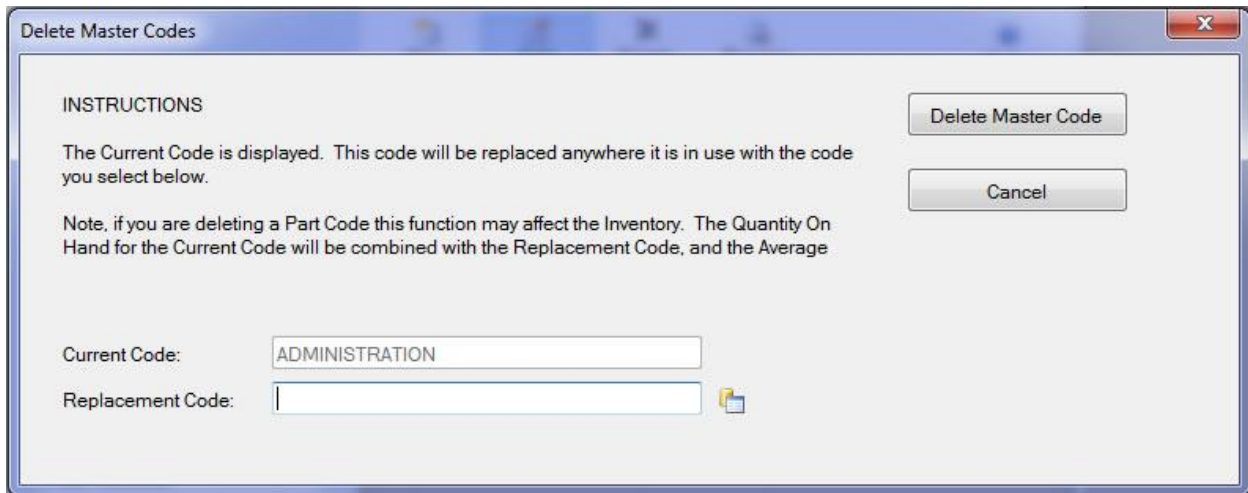
Save & New Save Undo Help

Department Code: ADMINISTRATION


## Delete Form

You can delete records in the SafetyWise System. When you delete records you will see one of two windows.

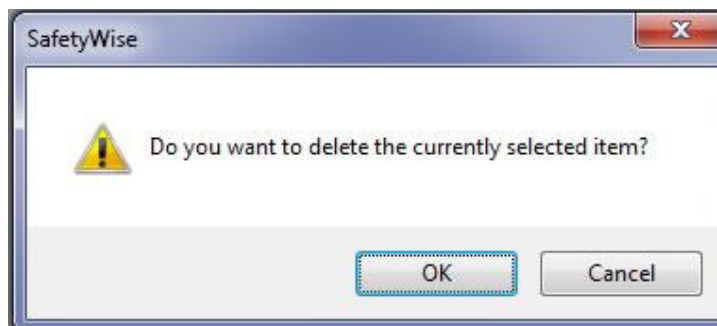
First, if the record you are deleting is in a Master Table, you will see the Delete Master Codes form. It is displayed below.

A screenshot of the 'Delete Master Codes' dialog box. The title bar says 'Delete Master Codes'. Inside, there's an 'INSTRUCTIONS' section with text: 'The Current Code is displayed. This code will be replaced anywhere it is in use with the code you select below.' and a note: 'Note, if you are deleting a Part Code this function may affect the Inventory. The Quantity On Hand for the Current Code will be combined with the Replacement Code, and the Average'. There are two buttons: 'Delete Master Code' and 'Cancel'. Below the instructions, there are two text boxes: 'Current Code:' with 'ADMINISTRATION' entered, and 'Replacement Code:' which is empty. A small browse icon is next to the Replacement Code box.

The form will display the currently selected code. You cursor will be in the Replacement Code

Box. You can type the code to delete, or you can click on the browse button  to select the code from a list of valid codes. Then you click on the Delete Master Code Button. The Current Code will be replaced with the Replacement Code you selected and then the Current Code will be deleted. At times you may not want to replace the current code with anything. Then you should select the UNKNOWN code. It is a standard in all of the tables.

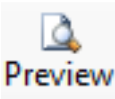
Second, if the form allows records to be deleted directly, the Delete Message Box will be displayed.

A screenshot of the 'Delete Message Box' dialog box. The title bar says 'SafetyWise'. Inside, there's a yellow warning triangle icon and the text: 'Do you want to delete the currently selected item?'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

Simply click on the OK button to delete the currently selected record.

## Preview Report Form

The Preview Report form is displayed below. This form is displayed when you click on the

Preview Button  on a data entry form or a report form.



**Print to Printer**

**SafetyWise**  
YOUR COMPANY NAME

DEPARTMENT CODE  
FROM: - ZZ - ZZ

PRINT DATE: 8/21/2012  
PRINT TIME: 12:33:08PM  
PAGE NUMBER: 1

DEPARTMENT CODE

ADMINISTRATION  
OPERATIONS  
UNKNOWN  
WAREHOUSE

COUNT: 4

Current Page No: 1      Total Page No: 1      Zoom Factor: Page Width

## List Box Controls

List Box Controls are used to select a Valid Code from a list of codes in the system. The Incident Master Table is displayed below. This form contains a number of List Box Controls.

The screenshot shows the 'Incident Master Form' with a yellow callout bubble pointing to the 'Location Code' field. The callout bubble contains the text 'List Box Control'. The form includes fields for Incident ID (2), Incident Date/Time (8/20/2012 3:15:29 PM), Status (OPEN), and various tabs like Incident Location, Incident Description, Injured Employees, Investigation Team, Witness Statements, Recommendations, PDF Files, and Pictures. The Location Info section shows 'Location Code' as 'GEORGIA WAREHOUSE', 'Company Name' as 'ALL ABOUT COMPUTERS, INC.', and 'Address' as '1000 MAIN STREET, ST. MARYS, GA 32205'. Contact information for Bob Smith is also provided.

A list box control contains a text box where you can begin typing the code you are looking for. As you type, the box will fill in with the closest valid code. You can click on the Down Arrow on the keyboard to display the next code. You can click on the Up Arrow on the keyboard to display the previous code. You can click on the Page Up key to display the first code in the list. You can click on the Page Down key to display the last code in the list. You can click on the



Browse Button to display a list of valid codes. You can search for a code by typing in the Criteria box on the Toolbar on the Left and then hitting enter. The browse window is displayed in the window below.

The screenshot shows the 'Browse - Location Code Form' window. It features a toolbar on the left with fields for Criteria, Sort Order (LOCATION CODE), Filter (NO FILTER), Type Search (FIND FIRST), and Max Records (100). The main area displays a table with two columns: LOCATION CODE and COMPANY NAME. The table contains two rows: 'GEORGIA WAREHOUSE' and 'UNKNOWN', both associated with 'ALL ABOUT COMPUTERS, INC.'. Navigation buttons are at the bottom, and the status 'Record 1 of 2' is shown.


LOCATION CODE	COMPANY NAME
GEORGIA WAREHOUSE	ALL ABOUT COMPUTERS, INC.
UNKNOWN	ALL ABOUT COMPUTERS, INC.

You can click on the Shortcut Button  to display the data entry form for the current control.

Finally, if you type a code that does not currently exist in the table; a message box will be displayed like the one below.



Simply click on the Yes button to add the new code to the table. Be aware that some tables capture a lot of information. This process will only add the code. The rest of the information will be blank. For example, the Employee Master Table captures the Employee Code, Employee Name, Address, Phone Number and more. If you add a code in the manner described here,

only the code will be filled in. You can click on the Short Cut Button  and the Employee Master Form will be displayed. You can then click on the New Button to add a new employee and complete all of the information. If you do not fill in the information initially, you can always edit the code later and complete filling in the information at that time.

## Master Tables Forms

The SafetyWise System contains a number of Master Tables. You set up the Master Tables one time and then use the codes throughout the system. For example, you can create a Location Code in the Location Code Table. You can then use that code in the Incident Master Table to identify the location where an accident or incident occurred. You can use the same Location Code in the Inspection Schedule Form to identify locations where you have scheduled inspections. If you need to change a Location Code, you change it in the Location Code table and the changes will be reflected everywhere it is used.

The following section will describe each Master Table in detail.

### Department Code Form

The Department Code Form contains the names of department in your business or organization. Department Codes provide away of identifying the department an employee belongs to. Example department codes might be like the following:

- ADMINISTRATION
- MAINTENANCE
- OPERATIONS
- POLICE
- PUBLIC WORKS

### Employee Master Form

The Employee Master Form contains the information on Employees. These codes are used though out the SafetyWise System. They are used in the Incident Master Form to identify the Employees involved in incidents, employees who are part of the investigation team, and identify witnesses to the incident. They are used in the Training Module to identify Trainers and students.

The Employee Code Form is displayed in edit mode below. You can enter or change any of the information for the Employee Code.

The screenshot displays the 'Employee Master Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, the 'Employee Code' is 'BEEMER, TOMMY' and the 'Active' status is 'Yes'. A tabbed interface shows four tabs: 'Information' (selected), 'Emergency Contact/Drivers License', 'Notes', and 'Training History'. The 'Information' tab contains two main sections: 'Employee Info' and 'Status'. The 'Employee Info' section includes fields for Employee Name (TOMMY R BEEMER), Title (WAREHOUSE 2), Address (100 POINT PETER ROAD), Country (USA), Email (T.BEEMER@FLEETWISEVB.COM), Department Code (WAREHOUSE), and Location Code (FLORIDA SHOP). The 'Status' section includes fields for Work Phone ((904) 381-0020), Extension (4), Fax, Cell Phone ((904) 716-4989), Home Phone ((904) 716-4579), and Night Phone.

Under the Employee Code you can click on the “TABS” to display additional information. You can click on the Emergency Contact/Drivers License information on display addition information. You can click on the Notes Tab to display notes on this employee. Finally, you can click on the Training History tab to display the various training classes the employee has attended.



The screenshot shows the 'Employee Master Form' window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these, the 'Employee Code' is 'DAVIS, ALBERT C.' and the 'Active' status is checked 'Yes'. A tabbed interface shows 'Information', 'Emergency Contact/Drivers License', 'Notes', and 'Training History'. The 'Training History' tab is active, displaying a table with two records.

	TRAINING ID	START DATE/TIME	TRAINING CLASS CODE	LOCATION CODE
▶	4	7/20/2012	DRIVING 101	FLORIDA SHOP
	3	4/20/2012	WAREHOUSE MANAGEMENT	FLORIDA SHOP

Record 1 of 2

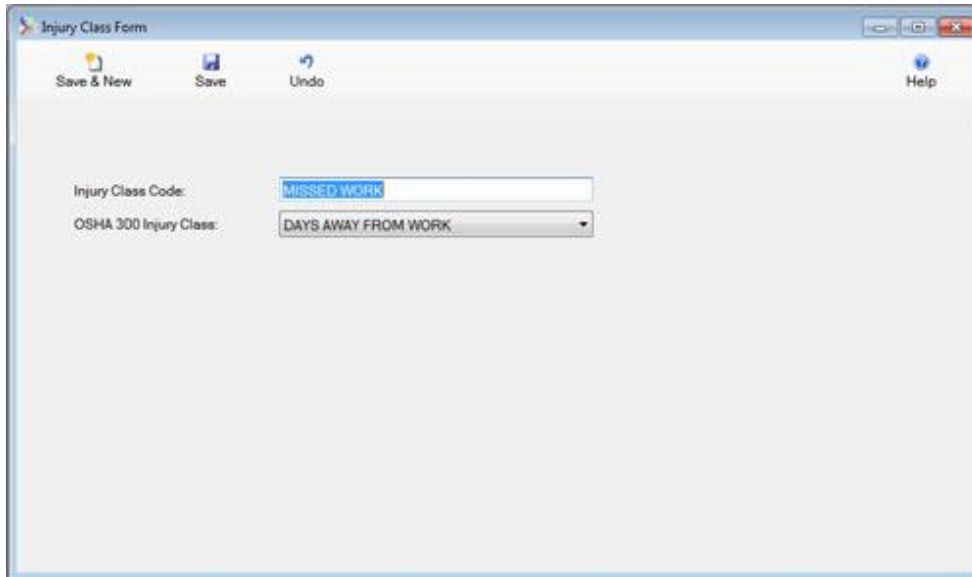
## Illness Type Form

The Illness Type form is displayed below. This form allows you to create numerous codes to describe an illness an employee has due to a work related incident. You can relate the specific code to the more general Illness classifications found on OSHA form 300.

The screenshot shows the 'Illness Type Form' window. It has buttons for 'Save & New', 'Save', 'Undo', and 'Help'. The 'Illness Type Code' field contains 'BACK INJURY'. Below it, the 'OSHA 300 Illness Type' dropdown menu is set to 'INJURY'.

## Injury Class Form

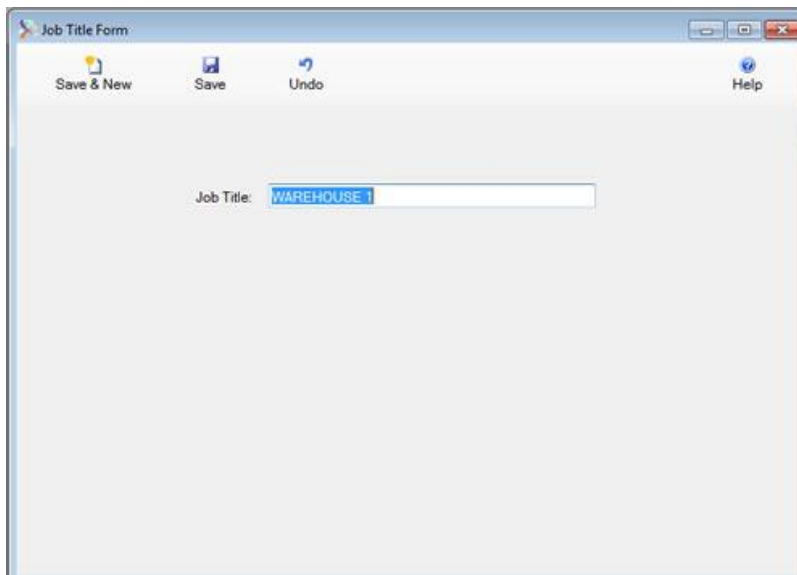
The injury Class Form is displayed below. You can enter unlimited number of Injury Classes. You can relate the Injury Class to the more limited Injury Class on the OSHA Form 300.



The screenshot shows a software window titled "Injury Class Form". At the top, there is a menu bar with four items: "Save & New", "Save", "Undo", and "Help". Below the menu bar, the main content area has two labels. The first label is "Injury Class Code:" followed by a text input field containing the text "MISSED WORK". The second label is "OSHA 300 Injury Class:" followed by a dropdown menu that currently displays "DAYS AWAY FROM WORK".

## Job Title Code Form

The Job Title Code Form is displayed below. This form is used in the Employee Master Form to identify the Job Title for an employee. The Job Title can also be used to determine the appropriate training classes for an employee.



The screenshot shows a software window titled "Job Title Form". At the top, there is a menu bar with four items: "Save & New", "Save", "Undo", and "Help". Below the menu bar, the main content area has a single label "Job Title:" followed by a text input field containing the text "WAREHOUSE 1".

## Location Code Form

The Location Code Form contains the names of locations used in your business or organization. Locations are used to identify places where incidents occurred, training classes will be held, and more.

Example, location codes might be like the following:

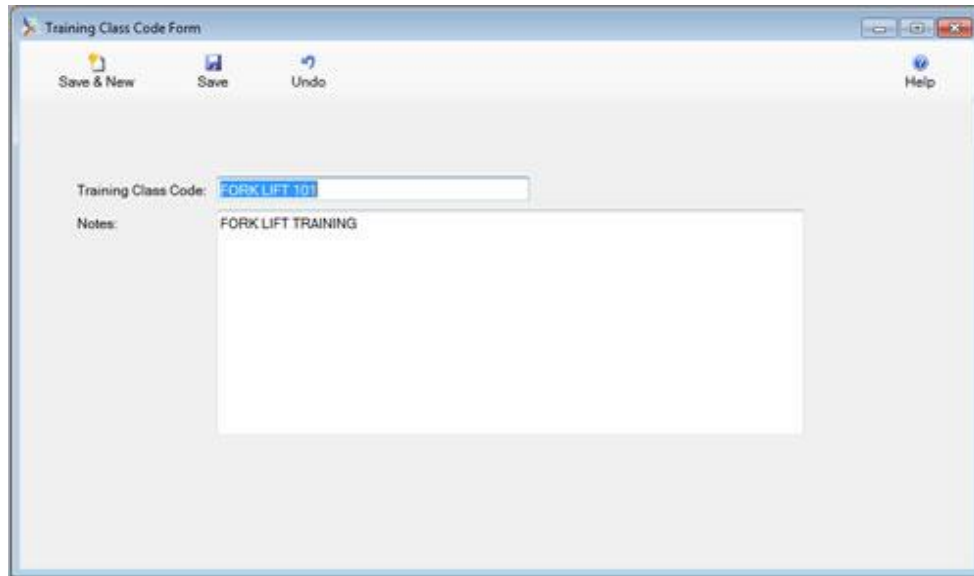
- FLORIDA SHOP
- MAIN SHOP
- POLICE STATION 1
- PUBLIC WORKS SHOP
- TEXAS SHOP

The Location Code Table is displayed in Edit Mode below. You can enter or change any of the information for the Location.

The screenshot shows a web-based form titled "Location Code Form". It has a menu bar with "Save & New", "Save", "Undo", and "Help". The form is divided into two columns. The left column contains fields for: Location Code (with "FLORIDA SHOP" entered), Company Name (ALL ABOUT COMPUTERS, INC), Address (2720 PARK STREET SUITE 202, JACKSONVILLE, FL, 32205), Country (USA), Contact (BEEMER, TOMMY), Email (T.BEEMER@FLEETWISEVB.COM), and Industry Description. The right column contains fields for: Phone Number ((904) 381-0016), Fax Number ((904) 381-0017), SIC Code (0), NAICS Code (0), # of Employees (0), and Total Employee Hours (0).

## Training Class Form

The Training Class Form is displayed below. This form is used to define classes for employees.



The screenshot shows a software window titled "Training Class Code Form". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a menu bar with four items: "Save & New", "Save", "Undo", and "Help". The main area of the window contains two input fields. The first is labeled "Training Class Code:" and contains the text "FORK LIFT 101". The second is labeled "Notes:" and contains the text "FORK LIFT TRAINING". The text in both fields is highlighted with a blue selection box.

Training Class Code Form

Save & New Save Undo Help

Training Class Code: FORK LIFT 101

Notes: FORK LIFT TRAINING

## Incident Master Form

The Incident Master Form contains information on all of the accidents/incidents that occur in your business or organization. Each time an Incident occurs you create a new record in the form. When all of the information has been gathered and entered into SafetyWise, you can close the incident to create a permanent history.

### Incident Master Browse

The Incident Master Form is displayed in browse mode below. All of the incidents can be displayed. You can also set the filter to "OPEN" to display only open incidents. Closed Incidents cannot be changed but all of the information can be viewed.

INCIDENT ID	STATUS	DATE	LOCATION CODE	LOCATION DESCRIPTION
1	CLOSED	8/20/2012	FLORIDA SHOP	LOADING DOCK - FIRST LA
2	OPEN	8/20/2012	GEORGIA WAREHOUSE	WAREHOUSE

### Incident Master Edit

An "OPEN" incident is displayed below in edit mode. Notice that the form contains multiple tabs of information.

#### ***Incident Location Tab***

On the first tab, you identify the location of the incident. You can enter a Location Code. The remaining information for the location will be displayed. If the Incident did not occur on your

property, you can still identify the location associated with the incident. At the bottom of the tab, you can enter unlimited notes about the exact location of the incident. This may be a description of the location within your facility, or it may be a description of the location on the road or at a job site.

When you “CLOSE” the incident, the Completion Information will be entered.

## ***Incident Description Tab***

The Incident Description Tab is displayed below. On this tab you can enter an extended description of the actual incident/accident.

Incident Master Form

Save & New Save Undo Help

Incident ID: 2 Incident Date/Time: 3/27/2013 3:15:29 PM Status: OPEN

Incident Location Incident Description Vehicle Info. Injured Employees Witness Statements Investigation Team Recommendations PDF Files Pictures

Incident Description: MOVING A BOX OF MURATIC ACID. THE BOX SPLIT OPEN AND THE JUGS FELL OUT. ONE OF THE JUGS BROKE. JAMES COMPLAINED OF A CHEMICAL BURN ON HIS HAND.

## Vehicle Information Tab

The Vehicle Information Tab is displayed in browse mode below. This tab allows you to enter an unlimited number of vehicles involved in a vehicle or piece of equipment accident. You can enter both vehicles you own and vehicles involved in the accident that you don't own.

Incident Master Form

Save & New Save Undo Help

Incident ID: 2 Incident Date/Time: 3/27/2013 3:15:29 PM Status: OPEN

Incident Location Incident Description Vehicle Info. Injured Employees Witness Statements Investigation Team Recommendations PDF Files Pictures

New Edit Delete Preview Help

	COMPANY OWNED	UNIT ID	VIN NUMBER	TAG NUMBER	MODEL CODE
	<input checked="" type="checkbox"/>	101	2TH231DDKE33111	FLA-323	F150
	<input checked="" type="checkbox"/>	OUTSIDE	FL34534634221345	FLA-988	1500

Record 2 of 2

The Vehicle Information Tab is displayed in edit mode below. On this tab, you identify each vehicle or piece of equipment involved in the accident. You can identify vehicles you own by placing a check in the Company Owned Vehicle check box.

Remove the check mark for vehicles not owned by you. Then fields to enter information about the owner of the vehicle will appear on the tab.

The screenshot displays the 'Incident Master Form' application window. The top menu bar includes 'Save & New', 'Save', 'Undo', and 'Help'. Below the menu bar, the 'Incident ID' is set to 2, the 'Incident Date/Time' is 3/27/2013 3:15:29 PM, and the 'Status' is OPEN. The main tab area shows 'Vehicle Info.' selected, with other tabs like 'Incident Location', 'Incident Description', 'Injured Employees', 'Witness Statements', 'Investigation Team', 'Recommendations', 'PDF Files', and 'Pictures' visible. The 'Vehicle Info.' tab contains sub-tabs for 'Vehicle Info.', 'Driver Info.', and 'Insurance Info.'. The 'Vehicle Info.' sub-tab is active, showing a form with the following fields: 'Company Owned Vehicle' (checked Yes), 'Licensed Vehicle' (checked Yes), 'Unit ID' (OUTSIDE), 'Manufacturer Code' (CHEVY), 'Model Code' (1500), 'Model Year' (2003), 'VIN Number' (FL34534634221345), 'Tag Number' (FLA-988), 'Title State' (FLORIDA), and 'Title Number' (FLA2342354354).

The Driver Information Tab is displayed in edit mode below. On this tab, you identify the driver of the vehicle or piece of equipment involved in the accident.



The screenshot shows the 'Incident Master Form' application window. The 'Vehicle Info' tab is selected, displaying fields for driver and vehicle information. The incident details at the top are: Incident ID: 2, Incident Date/Time: 3/27/2013 3:15:29 PM, and Status: OPEN. The 'Vehicle Info' tab contains the following data:

Driver is Employee:	<input type="checkbox"/> Yes	Drivers License #:	FLA232543434
Employee Code:	UNKNOWN	License State:	FLORIDA
Driver Name:	TOM FRANKS	Drivers License Expiration:	2/3/2016
Address:	2345 1ST STREET JACKSONVILLE FL 32205	Birth Date:	2/3/1990
Work Phone:	(904) 123-4567		
Cell Phone:	(904) 234-5678		
Home Phone:	(904) 345-6789		
Email:	TOM.FRANKS@FLEETWISEVB.COM		

The Insurance Information Tab is displayed below. On this tab you enter all of the insurance information for the vehicle.

The screenshot shows the 'Incident Master Form' application window with the 'Insurance Info' tab selected. The incident details remain the same. The 'Insurance Info' tab contains the following data:

Insurance Code:	STATE FARM	Agent Name:	TOM JONES
Policy Number:	FL234364354	Email:	TOM.JONES@STATEFARM.COM
Start Date:	2/13/2012	End Date:	2/13/2014
Insurance Company:	STATE FARM	Phone Number:	(904) 345-6789
Address:	100 MAIN STREET JACKSONVILLE FL 32205	Fax Number:	(904) 456-7890
Country:	USA		
Email:	ADMIN@STATEFARM.COM		
Phone Number:	(904) 123-4567		
Fax Number:	(904) 234-5678		

## ***Injured Employee Tab***

The Injured Employees Tab is displayed below. You can enter information on an unlimited number of employees injured by the incident. You simply click on the NEW button to add another employee.

The screenshot shows the 'Incident Master Form' application window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these are input fields for 'Incident ID' (containing '2'), 'Incident Date/Time' (containing '8/20/2012 3:15:29 PM'), and 'Status' (containing 'OPEN'). A tabbed interface is visible with the following tabs: 'Incident Location', 'Incident Description', 'Injured Employees' (which is the active tab), 'Investigation Team', 'Witness Statements', 'Recommendations', 'PDF Files', and 'Pictures'. Below the tabs, there are buttons for 'New', 'Edit', 'Delete', and 'Preview'. The main area is a table with the following columns: 'LAST NAME', 'FIRST NAME', 'JOB TITLE', '# OF DAYS OFF WORK', '# OF DAYS RESTRICTED', 'EMERGENCY ROOM', 'HOSPITAL STAY', and 'ILLNESS TYPE CODE'. The first row of data contains: 'CONWELL', 'JAMES', 'WAREHOUSE 2', '0', '0', a checked box, a checked box, and 'BURN'. At the bottom left, it says 'Record 1 of 1'.

LAST NAME	FIRST NAME	JOB TITLE	# OF DAYS OFF WORK	# OF DAYS RESTRICTED	EMERGENCY ROOM	HOSPITAL STAY	ILLNESS TYPE CODE
CONWELL	JAMES	WAREHOUSE 2	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BURN

The Injured Employee Tab is displayed in edit mode below. You identify the employee injured. The employee name, and address information will be displayed from the Employee Master Table. You can enter information about the Health Care Professional who provided treatment and information about the treatment facility. The remaining information is used to describe the injury and is required by OSHA form 300.

Notice there are multiple tabs of information for each employee. Click on the Work Information Tab to display additional information. Here you can enter information about when the employee started work and what they were doing prior to the incident. Again this information appears on the OSHA 300 Form.

Click on the Injury Information Tab to enter descriptions of the actual injury the employee sustained and to enter a description of what caused the injury. Finally click on the Employee Statement tab to enter an employee statement. If you have a signed statement from the employee you can scan the document to a PDF file and attach it to the incident. That process will be described later.

The screenshot shows the 'Incident Master Form' window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these are fields for 'Incident ID' (2), 'Incident Date/Time' (8/20/2012 3:15:29 PM), and 'Status' (OPEN). A tabbed interface is visible with tabs for 'Incident Location', 'Incident Description', 'Injured Employees', 'Investigation Team', 'Witness Statements', 'Recommendations', 'PDF Files', and 'Pictures'. The 'Injured Employees' tab is active, showing sub-tabs for 'Employee Info', 'Work Info', 'Injury Info', and 'Employee Statement'. The 'Employee Info' sub-tab is selected, displaying fields for 'Employee Code' (CONWELL, JAMES), 'Employee Name' (JAMES CONWELL), 'Address' (POST OFFICE BOX 43443, YULEE, FL 32097), 'Treatment Facility' (Health Care Professional: DR. BILL JONES, Facility Name: BAPTIST, Facility Address: 1234 MAIN STREET, JACKSONVILLE, FL 32205), and 'Injury Info' (Job Title: WAREHOUSE 2, Male Employee: Yes, Birth Date: 4/16/1961, Date Hired: 10/15/1995, Emergency Room: Yes, Hospital Stay: Yes, Injury Class Code: UNKNOWN, Injury Type Code: BURN, Number of Days From Work: 0, Number of Days Restricted: 0, Date of Death: ).

## ***Investigation Team Tab***

The Investigation Team can be entered on the Investigation Team Tab. The tab is displayed below.

The screenshot shows the 'Incident Master Form' window with the 'Investigation Team' tab selected. The tab has buttons for 'New', 'Edit', 'Delete', and 'Preview'. Below these buttons is a table with the following data:

LAST NAME	FIRST NAME	WORK PHONE	CELL PHONE	INVESTIGATOR STATEMENT
BEAVER	TOMMY	(904) 381-0020	(904) 716-4989	I THINK THE BOX BROKE OPEN BECAUSE IT WAS DAMAGED WHEN PUT UP ON THE RACK. NEED TO

At the bottom left, it says 'Record 1 of 1'.

You can enter an unlimited number of members of the Investigation Team. Simply click on the new button to add another member. The Investigation Team tab is displayed in edit mode below.

You can select the employee. The employee information will be displayed from the Employee Master Table.

## ***Witness Statements***

The Witness Statement tab is displayed below in edit mode. You can enter an unlimited number of Witness Statements. Simply click on the new button to add a new statement.

The screenshot shows the 'Incident Master Form' application. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these, the 'Incident ID' is set to 2, 'Incident Date/Time' is 8/20/2012 3:15:29 PM, and 'Status' is OPEN. The 'Witness Statements' tab is selected, showing a table with one record:

LAST NAME	FIRST NAME	WORK PHONE	CELL PHONE	WITNESS STATEMENT
SMITH	THOMAS	123-4560	234-5670	IT WAS A BAD ACCIDENT

At the bottom left, it says 'Record 1 of 1'.

The Witness Statement tab is displayed in edit mode below.

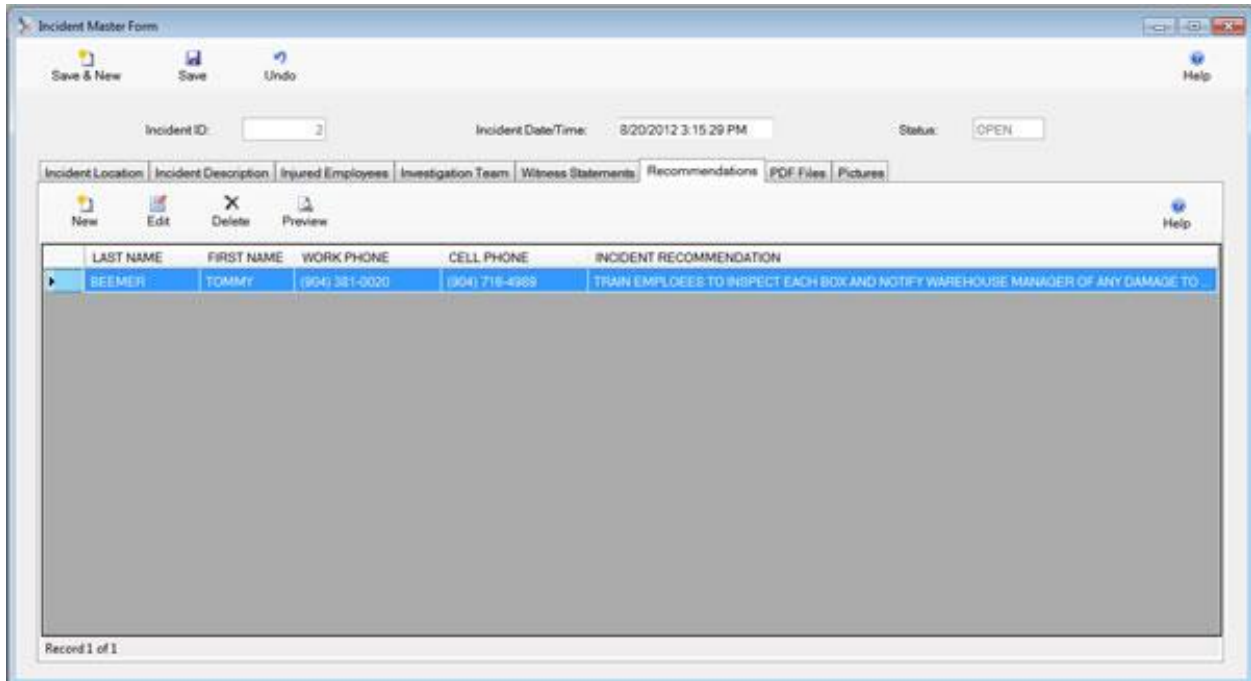
The screenshot shows the 'Incident Master Form' application in edit mode for the 'Witness Statements' tab. The form contains the following fields:

- Statement Date/Time:** 8/22/2012 11:32:06 AM
- Employee Statement:** ☒ Yes
- Employee Code:** UNKNOWN
- Witness Name:** THOMAS SMITH
- Address:** 2343 W. 1ST STREET, JACKSONVILLE, FL 32205
- Job Title:** UNKNOWN
- Email:** TSMITH@AOL.COM
- Statement:** IT WAS A BAD ACCIDENT
- Work Phone:** 123-4560
- Cell Phone:** 234-5670
- Home Phone:** 345-6789

You can enter statements from both employees and non employees. If you enter put a check mark in the Employee Statement check box, you are selecting an employee. The employee information will be displayed. If you remove the check mark you can enter an employee name and the remaining information. You can then enter the employee's statement.

## Recommendations

You can enter an unlimited number of recommendations concerning the incident. You simply click on the new button to add another recommendation. The Recommendations tab is displayed in browse mode below.



The screenshot shows the 'Incident Master Form' window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these are input fields for 'Incident ID' (containing '2'), 'Incident Date/Time' (containing '8/20/2012 3:15:29 PM'), and 'Status' (containing 'OPEN'). A tabbed interface is visible with the following tabs: 'Incident Location', 'Incident Description', 'Injured Employees', 'Investigation Team', 'Witness Statements', 'Recommendations' (which is the active tab), 'PDF Files', and 'Pictures'. Below the tabs, there are buttons for 'New', 'Edit', 'Delete', and 'Preview'. The main area displays a table with the following data:

LAST NAME	FIRST NAME	WORK PHONE	CELL PHONE	INCIDENT RECOMMENDATION
BEEMER	TOMMY	(904) 361-0020	(904) 718-4988	TRAIN EMPLOYEES TO INSPECT EACH BOX AND NOTIFY WAREHOUSE MANAGER OF ANY DAMAGE TO

At the bottom left of the table area, it says 'Record 1 of 1'.

The Recommendations tab is displayed in Edit mode below. You can identify the person making the recommendation and you can indicate whether the recommendation has been completely implemented by putting a check mark in the Completed check box.

The screenshot shows the 'Incident Master Form' application window. The 'Recommendations' tab is selected. The form contains the following fields and values:

- Incident ID: 2
- Incident Date/Time: 8/20/2012 3:15:29 PM
- Status: OPEN
- Date/Time: 8/20/2012 3:15:31 PM
- Completed: ☐ Yes
- Completed Date/Time: (empty)
- Employee Code: BEEMER, TOMMY
- Responsible Person: TOMMY BEEMER
- Work Phone: (904) 351-0020
- Cell Phone: (904) 716-4989
- Job Title: WAREHOUSE 2
- Email: T.BEEMER@FLEETWISEVL.COM
- Recommendation: TRAIN EMPLOYEES TO INSPECT EACH BOX AND NOTIFY WAREHOUSE MANAGER OF ANY DAMAGE TO A BOX

## PDF Files

The PDF Files tab is displayed below in Edit Mode. You can add an unlimited number of PDF files to a single incident. Simply click on the new button to view the PDF file. You can also view

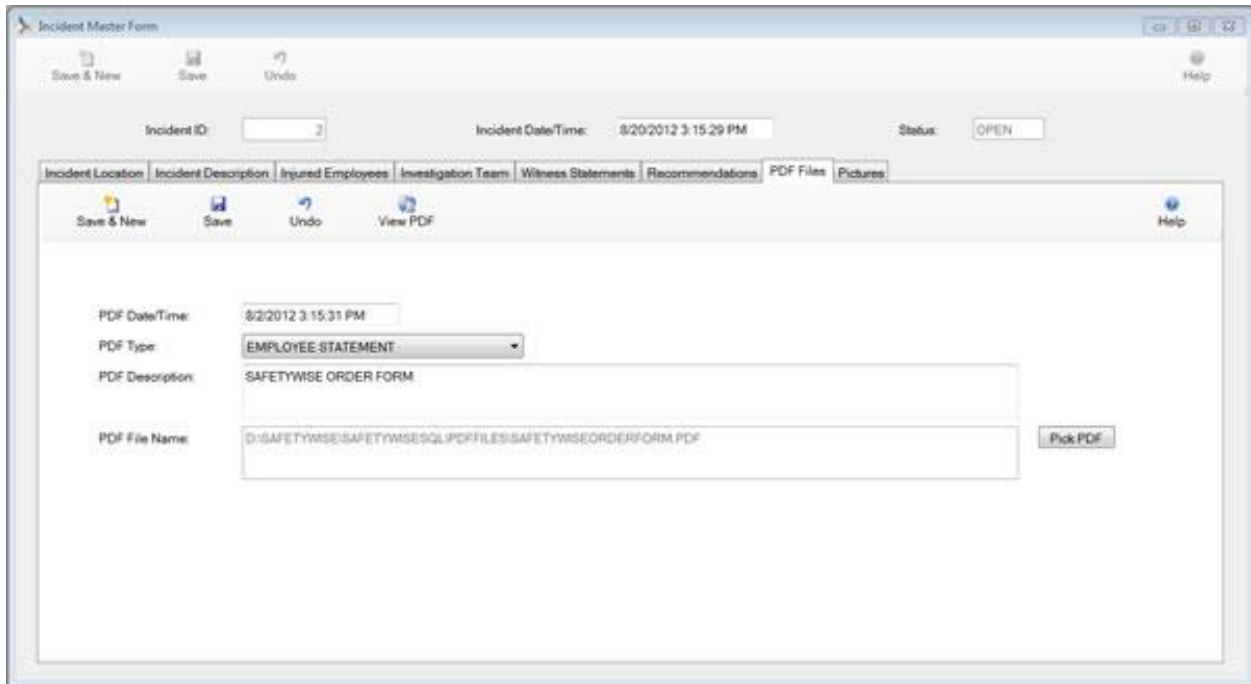
the PDF File by clicking on the View PDF button  on the toolbar.

The screenshot shows the 'Incident Master Form' application window with the 'PDF Files' tab selected. The toolbar includes buttons for New, Edit, Delete, Preview, and View PDF. The main area displays a table with the following data:

DATE	FILE NAME	DESCRIPTION	FILE NAME
8/20/2012	EMPLOYEE STATEMENT	SAFETYWISE ORDER FORM	D:\SAFETYWISE\SAFETYWISESQL\PDF FILES\SAFETYWISEORD

Record 1 of 1

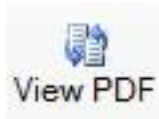
The PDF Files tab is displayed in edit mode below. You can enter a type of document and a description. Then click on the Pick PDF button to select the PDF File. The file should be stored on the workstation on a standalone system, or on a shared location on the server in a network system.



The screenshot shows the 'Incident Master Form' application window. The 'PDF Files' tab is selected, displaying a sub-form with the following fields and controls:

- Incident ID:** 2
- Incident Date/Time:** 8/20/2012 3:15:29 PM
- Status:** OPEN
- PDF Date/Time:** 8/2/2012 3:15:31 PM
- PDF Type:** EMPLOYEE STATEMENT (dropdown menu)
- PDF Description:** SAFETYWISE ORDER FORM
- PDF File Name:** D:\SAFETYWISE\SAFETYWISESQL\PDFFILES\SAFETYWISEORDERFORM.PDF
- Buttons:** Save & New, Save, Undo, View PDF, Pick PDF, Help

Once a file has been selected, you can view the file by clicking on the View PDF button.



The PDF File will be displayed in the Acrobat PDF File viewer.



**SafetyWise VB Order Form**

Customer Information	
Date of Order:	
Name:	
Title:	
Company:	
Street Address:	
Address:	
City, State, Zip:	
Phone #:	
Fax #:	
Email:	

Card Types:	AMX: <input type="checkbox"/>	Visa: <input type="checkbox"/>	MasterCard: <input type="checkbox"/>	Government PO: <input type="checkbox"/>
Card Number:	3-4 Digit CSC:			
Name on Card:				

## ***Pictures Tab***

The Pictures Tab is displayed below. You can add an unlimited number of pictures to a single incident. Simply click on the new button to add another picture.

The screenshot shows the 'Incident Master Form' application. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these, the 'Incident ID' is set to 2, 'Incident Date/Time' is 8/20/2012 3:15:29 PM, and 'Status' is OPEN. The 'Pictures' tab is selected, showing a table with one record:

DATE	FILE NAME	FILE NAME
8/23/2012	REPAIRED TAILGATE	D:\SAFETYWISE\SAFETYWISESQL\PICTURES\SP1010003.JPG

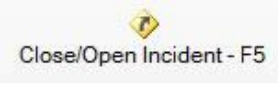
At the bottom, it says 'Record 1 of 1'.

This Pictures tab is displayed in edit mode below. You can enter a description of the picture. Then click on the Pick Picture button to select the picture. Pictures should be stored on the workstation in a standalone system, or on a shared location on a network server for the networked system. The picture will be displayed in the form.

The screenshot shows the 'Incident Master Form' application in edit mode for the 'Pictures' tab. The 'Picture DateTime' is 8/20/2012 11:10:30 AM. The 'Description' field contains 'REPAIRED TAILGATE'. The 'File Name' field contains 'D:\SAFETYWISE\SAFETYWISESQL\PICTURES\SP1010003.JPG'. A 'Pick Picture File' button is visible. To the right, a photograph of the rear of a white Chevrolet pickup truck is displayed.

## Close Incident

The Close Incident form is displayed below. This form is displayed when you click on the

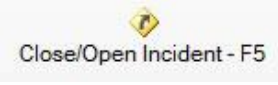
Close/Reopen Incident button  while an open incident is displayed in browse mode. You can enter the name of the person closing the incident, their job title and their phone number. This information will appear on the closed incident. Once an incident is closed, you cannot change the information, however you can reopen an incident if necessary.

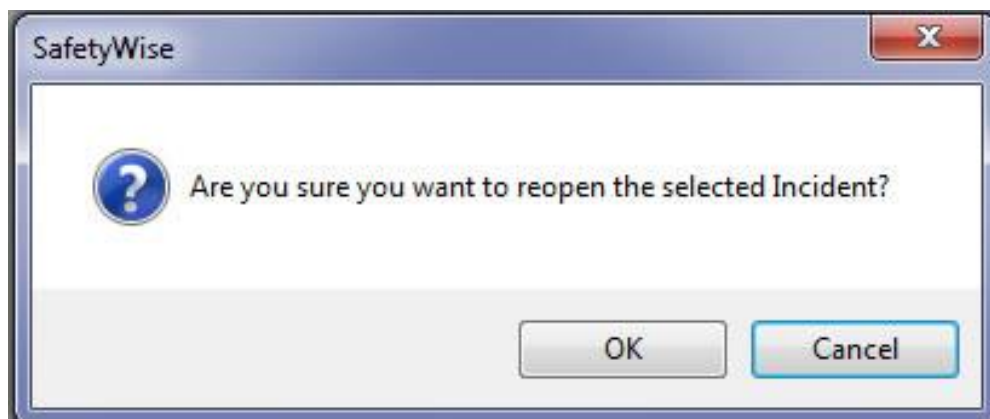


The image shows a Windows-style dialog box titled "CloseIncidentForm". It has an orange background. On the left, there are four labels: "Date Completed:", "Completed By:", "Title:", and "Phone:". The "Date Completed:" field is a text box containing "8/23/2012 11:29:23 AM". The other three fields are empty text boxes. On the right side of the dialog, there are two buttons: "Close Incident" and "Cancel".

## Reopen Incident

The Reopen Incident form is displayed below. This form is displayed when you click on the

Close/Reopen Incident button  while a closed incident is displayed in browse mode. You simply click on the OK button to reopen the incident.



The image shows a Windows-style dialog box titled "SafetyWise". It has a white background. On the left, there is a question mark icon. To the right of the icon, the text reads "Are you sure you want to reopen the selected Incident?". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

# Inspection Module

## Inspection Schedule Form

### *Inspection Schedule Browse*

The Inspection Schedule Form is displayed in browse mode below. You can create an unlimited number of inspections by simply clicking on the new button.

INSPECTION ID	NEXT DATE	LOCATION CODE	EMPLOYEE CODE
1	11/24/2012	FLORIDA SHOP	DAVIS, ALBERT C.
2	2/16/2013	GEORGIA WAREHOUSE	GRAY, MARK N.

### *Inspection Schedule Edit*

The Inspection Schedule Form is displayed in Edit Mode below. You enter the number of days between inspections and the last date of the inspection. The program will calculate the next date to perform the inspection.

You can enter an employee assigned to perform the inspection. You enter the Location Code for the inspection. Location Codes are normally separate physical locations. In the Location Description, you can indicate the specific area of the location where the inspection will take place. You can then enter any notes or instructions for the inspection. You can then click on the Check List tab to enter a check list of items to be inspected.

The screenshot shows the 'Inspection Schedule Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, there are input fields for 'Inspection ID' (value: 1), 'Schedule Days' (value: 24), 'Last Date' (value: 8/26/2012), and 'Next Date' (value: 11/24/2012). The 'Check List' tab is selected, showing a form with fields for 'Employee Code' (DAVIS, ALBERT C.), 'Location Code' (FLORIDA SHOP), and 'Location Description' (INSPECT THE LOADING DOCK). There is also a 'Notes' section with a text area.

The Check List Tab is displayed in browse mode below. You can enter an unlimited number of items in the check list.

The screenshot shows the 'Inspection Schedule Form' window in browse mode. The 'Check List' tab is selected, and it displays a table with four columns: 'ITEM NUMBER', 'ITEM DESCRIPTION', and 'NOTES'. The table contains four rows of data. Above the table, there are buttons for 'New', 'Edit', and 'Delete'. Below the table, it says 'Record 1 of 4'.

ITEM NUMBER	ITEM DESCRIPTION	NOTES
1	CHECK FIRE EXTINGUISHERS	
2	SAFETY SIGNAGE	
3	EMPLOYEE EQUIPMENT - SAFETY SHOES	
4	GENERAL CLEANLINESS	

The Check List is displayed in edit mode below. You can enter an Item Number. This designates the order items appear on the check list. You can then enter a description of the item to be inspected and any notes. The description might be Inspect Fire Extinguishers and the notes might include “Right down the date the extinguisher expires”.

The screenshot shows the 'Inspection Schedule Form' application window. It has a menu bar with 'Save & New', 'Save', 'Undo', and 'Help'. Below the menu bar, there are input fields for 'Inspection ID:' (value: 1), 'Schedule Days:' (value: 90), 'Last Date:' (value: 8/26/2012), and 'Next Date:' (value: 11/24/2012). The window has two tabs: 'Inspection Info' and 'Check List'. The 'Check List' tab is active, showing a sub-menu bar with 'Save & New', 'Save', 'Undo', and 'Help'. Below this, there are input fields for 'Item Number:', 'Item Description:' (value: CHECK FIRE EXTINGUISHERS), and 'Notes:' (a large text area).

## ***Create Active Inspection***

Click on the Create Active Inspection button to create an active inspection. The last date performed will be updated to the current date. When you close the Inspection the Last Date will be updated to the date indicated during the closing process.

The screenshot shows the 'Create Active Inspection Form' dialog box. It has a title bar with a close button. The dialog box has an orange background. On the left, under the heading 'INSTRUCTIONS', there is text: 'This process will create an Active Inspection. The Last Date will be updated to the current date. Click on the Create Active Inspection button to proceed.' On the right, there are two buttons: 'Create Active Inspection' and 'Cancel'.

## Active Inspection Form

### Active Inspection Browse

The Active Inspection Form is displayed in browse mode below. Active Inspections can be created automatically from the Inspection Schedule Form, or they can be created manually by clicking on the New Button.

INSPECTION ID	SCHEDULED DATE	INSPECTION STATUS	LOCATION CODE	EMPLOYEE CODE
1	8/2/2012	OPEN	GEORGIA WAREHOUSE	GRAY, MARK N.
2	8/8/2012	OPEN	FLORIDA SHOP	DAVIS, ALBERT C.

### Active Inspection Edit

The Active Inspection Form is displayed in edit mode below. You can select an employee to perform the inspection. You can select a location code and enter a description of the inspection. Then you can enter any notes about the inspection. You can also click on the tabs to display additional information.

The screenshot shows the 'Active Inspection Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, there is a field for 'Inspection ID' with the value '1' and a 'Status' dropdown menu set to 'OPEN'. The main area has tabs for 'Inspection Info', 'Check List', 'Recommendations', 'PDF Files', and 'Pictures'. The 'Inspection Info' tab is active, showing fields for 'Scheduled Date' (02/26/17), 'Employee Code' (GRAY, MARK N), 'Location Code' (GEORGIA WAREHOUSE), and 'Location Description' (WAREHOUSE INSPECTION). There is also a 'Notes' section with a large text area.

### Active Inspection Check List

The Active Inspection Check List is displayed below in browse mode. You can add an additional item, or you can enter information about an item during the inspection.

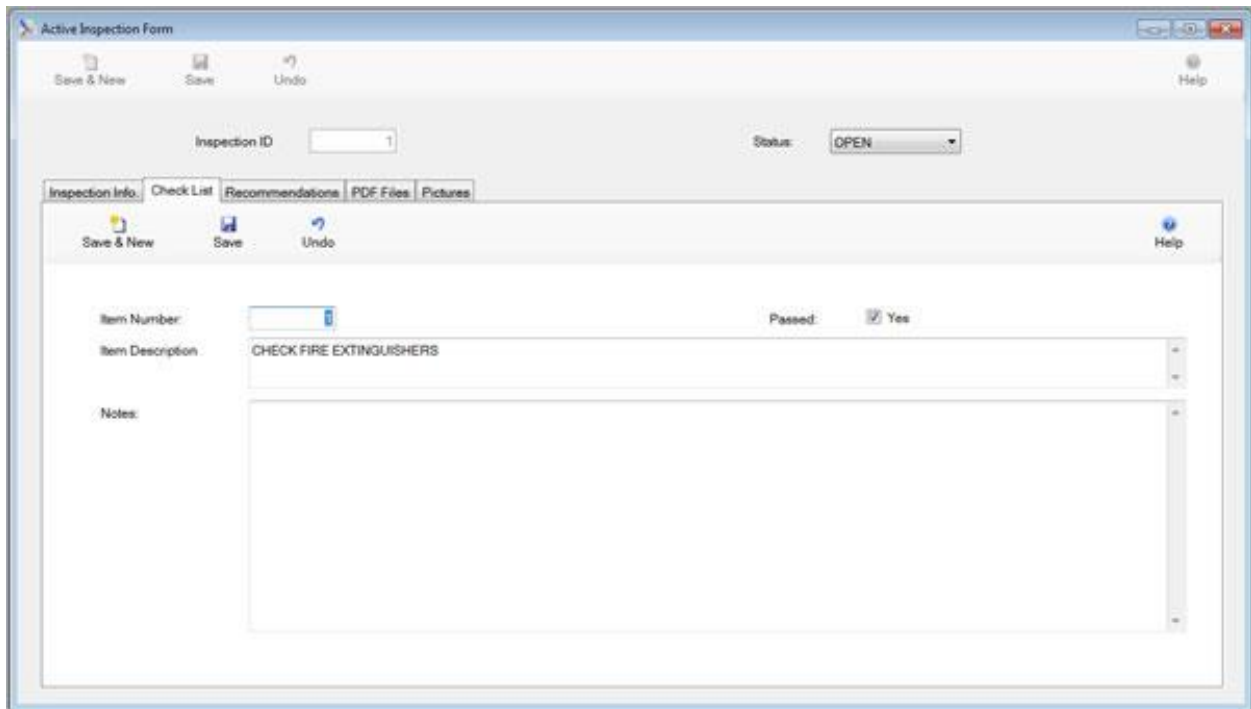
The screenshot shows the 'Active Inspection Form' window with the 'Check List' tab active. At the top, there are buttons for 'New', 'Edit', 'Delete', 'Preview', and 'Help'. Below these, there is a table with the following data:

ITEM NUMBER	ITEM DESCRIPTION	PASSED	NOTES
1	CHECK FIRE EXTINGUISHERS	<input checked="" type="checkbox"/>	
2	CHECK FORK LIFT INSPECTION RECORDS	<input checked="" type="checkbox"/>	
3	VERIFY ALL CONTAINERS ARE PROPERLY ST...	<input checked="" type="checkbox"/>	
4	CHECK EMPLOYEE SAFETY EQUIPMENT	<input type="checkbox"/>	WILL JONES DIDN'T HAVE SAFETY SHOES ON.
5	REVIEW OVERALL CLEANLINESS	<input checked="" type="checkbox"/>	

At the bottom of the window, it says 'Record 1 of 5'.



The Active Inspection Check List is displayed in edit mode below. You can indicate the item passed inspection by putting a check mark in the passed box. You can also enter any notes about the inspection.



The screenshot shows the 'Active Inspection Form' window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo', and a 'Help' button. Below these, the 'Inspection ID' is set to '1' and the 'Status' is set to 'OPEN'. The 'Check List' tab is selected, showing a list of items. The first item is 'CHECK FIRE EXTINGUISHERS'. The 'Item Number' is '1' and the 'Passed' checkbox is checked. The 'Notes' field is empty. The window also has a 'Save & New', 'Save', and 'Undo' button bar at the top of the main content area, and a 'Help' button on the right.

## ***Active Inspection Recommendations***

The Active Inspection Recommendations tab is displayed below in browse mode. You can enter an unlimited number of recommendation simply by clicking on the new button.

Active Inspection Form

Save & New Save Undo Help

Inspection ID: 1 Status: OPEN

Inspection Info Check List Recommendations PDF Files Pictures

New Edit Delete Preview Help

LAST NAME	FIRST NAME	WORK PHONE	CELL PHONE	RECOMMENDATION
GRAY	MARK	(904) 381-0023	(904) 716-4579	WILL JONES SHOULD BE SCHEDULED FOR TRAINING CLASS - WAREHOUSE 101

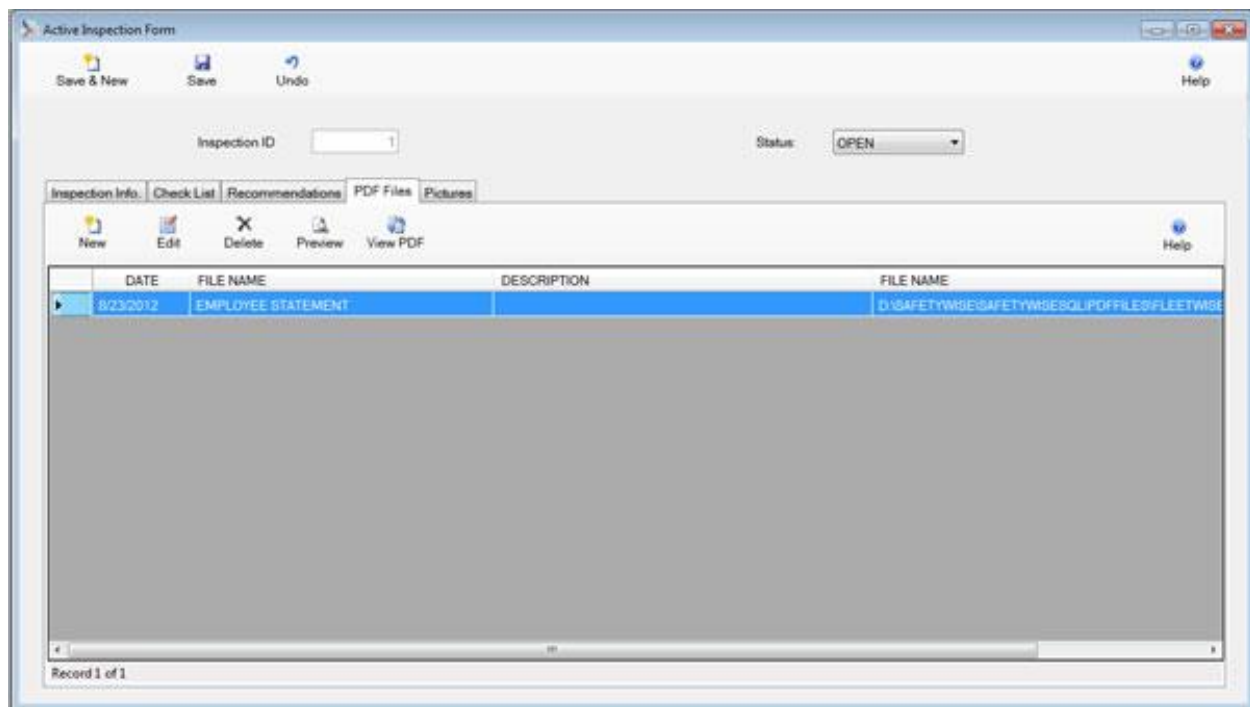
Record 1 of 1

The Recommendation Tab is displayed in edit mode below. You can select the employee making the recommendation. The employee information will be displayed from the Employee Master Table. You can indicate that implementation of the recommendation is complete by putting a check mark in the completed check box. Finally you can type unlimited text to describe the recommendation.

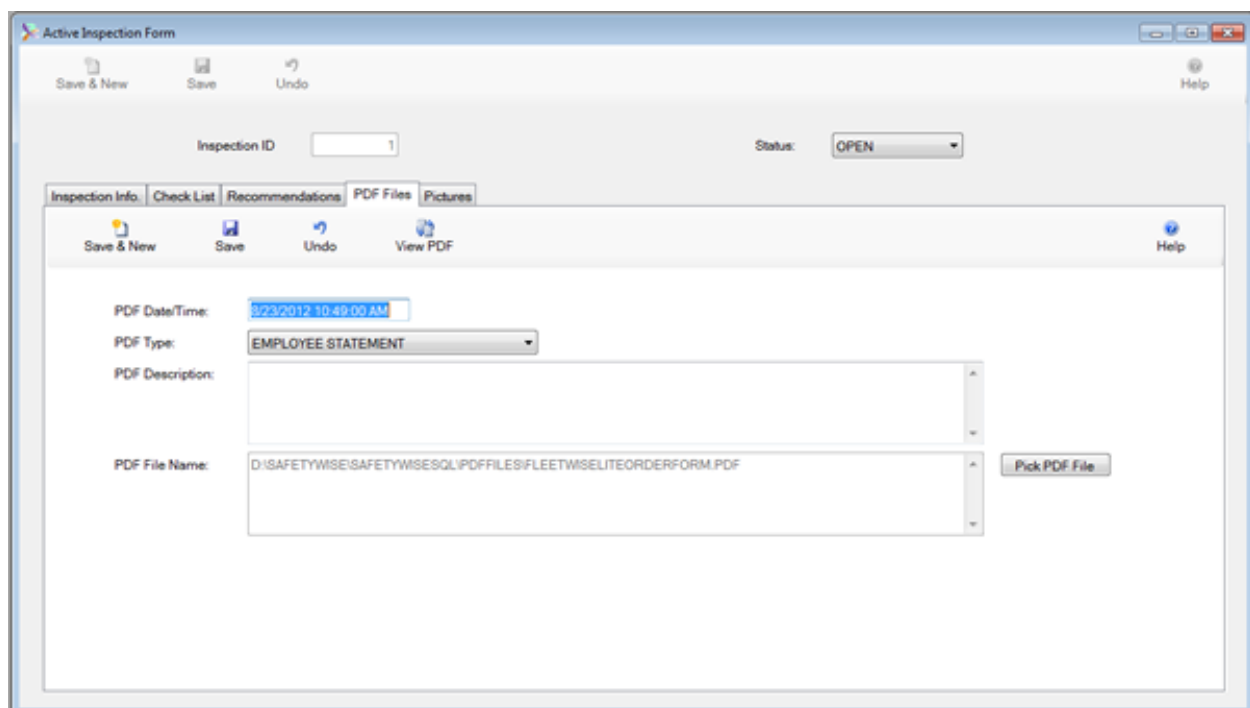
## ***PDF Files***

The PDF Files tab is displayed below in Edit Mode. You can add an unlimited number of PDF files to a single inspection. Simply click on the new button to view the PDF file. You can also

view the PDF File by clicking on the View PDF button  on the toolbar.



The PDF Files tab is displayed in edit mode below. You can enter a type of document and a description. Then click on the Pick PDF button to select the PDF File. The file should be stored on the workstation on a standalone system, or on a shared location on the server in a network system.



Once a file has been selected, you can view the file by clicking on the View PDF button.



The PDF File will be displayed in the Acrobat PDF File viewer.

A screenshot of a web browser window titled "PDFFileViewer". The window displays a PDF document titled "SafetyWise VB Order Form". The form contains two main sections: "Customer Information" and "Card Information".

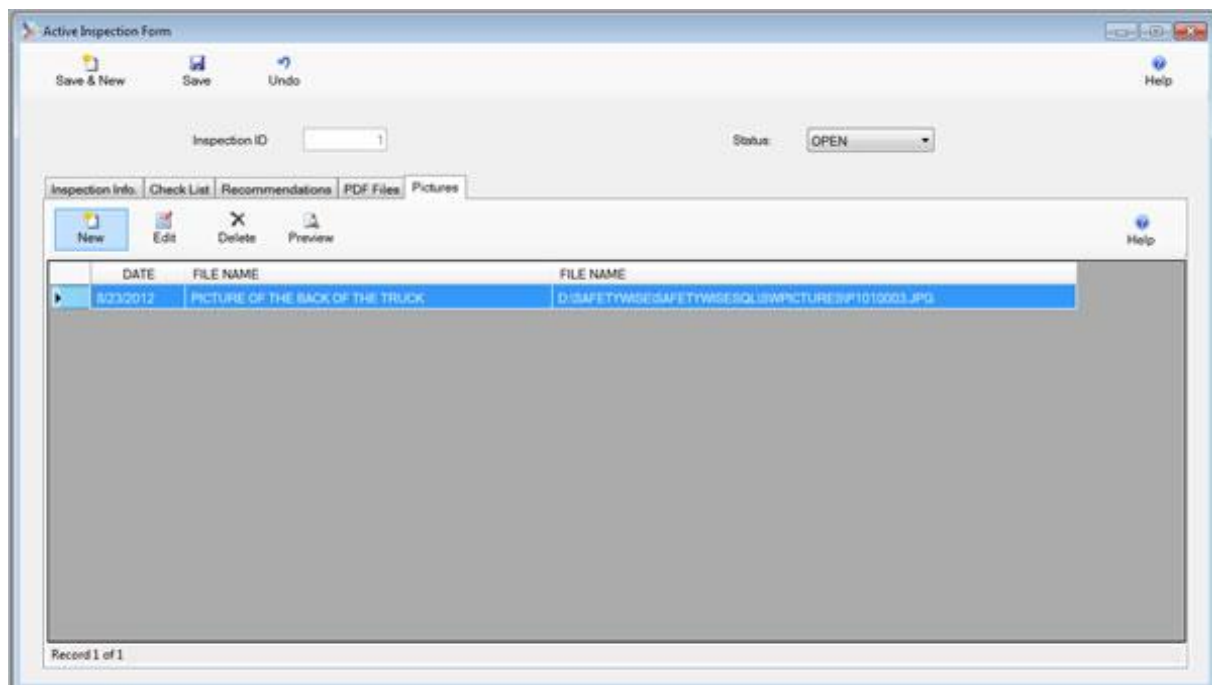
Customer Information	
Date of Order:	
Names:	
Title:	
Company:	
Street Address:	
Address:	
City, State, Zip:	
Phone #:	
Fax #:	
Email:	

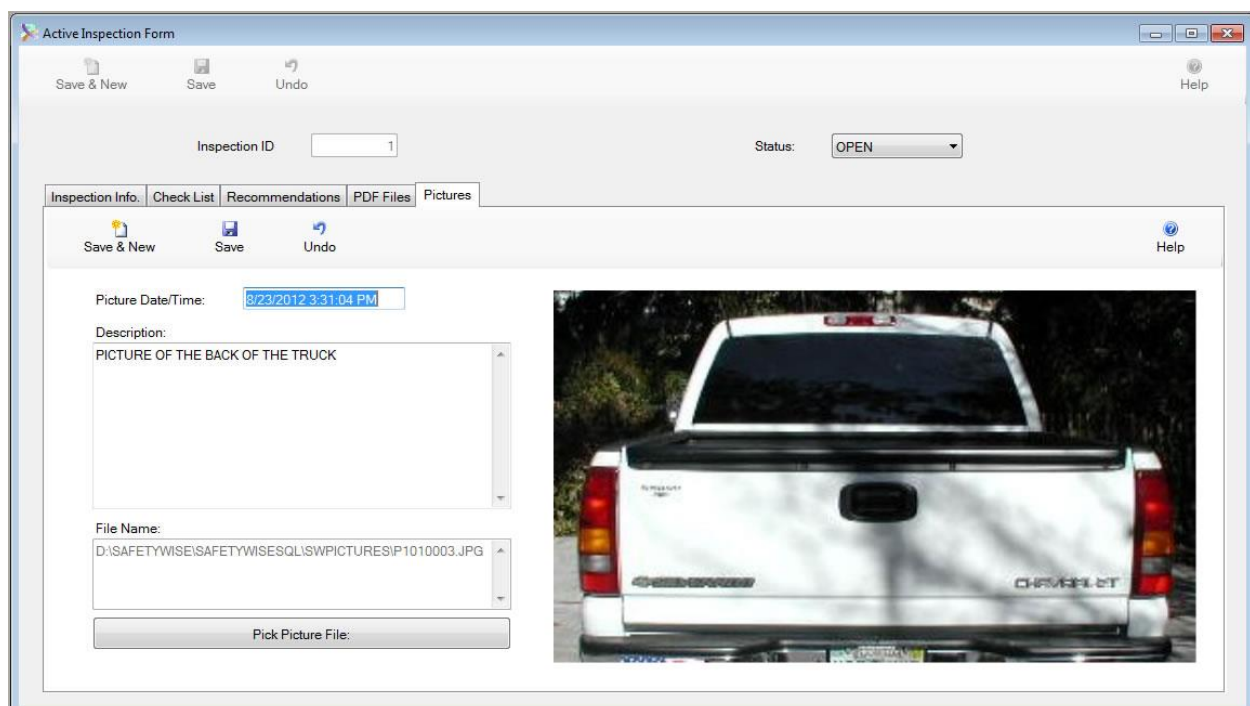
Card Type:	AMX: <input type="checkbox"/>	Visa: <input type="checkbox"/>	MasterCard: <input type="checkbox"/>	Government PO:
Card Number:	3-4 Digit CSC:			
Name on Card:				

## ***Pictures Tab***

The Pictures Tab is displayed below. You can add an unlimited number of pictures to a single inspection. Simply click on the new button to add another picture.



This Pictures tab is displayed in edit mode below. You can enter a description of the picture. Then click on the Pick Picture button to select the picture. Pictures should be stored on the workstation in a standalone system, or on a shared location on a network server for the networked system. The picture will be displayed in the form.



## ***Post Active Inspection***

When an inspection is complete, you post the inspection to create a complete history of all inspections performed. All of the information will be moved from the Active Inspection Form to the Posted Inspection Form. The Post Active Inspection Form is displayed by selecting an Inspection in the Active Inspection Form, and clicking on the Post Inspection Button.



Active Inspection Form

**INSTRUCTIONS**

This process will move the information from the Active Inspection Form to the Posted Inspection Form.

Enter the date when the inspection was completed, and click on the Post Active Inspection Button.

Date Completed: 8/23/2012 5:04:23 PM

Post Active Inspection

Cancel

Simply enter the date and time when the inspection was completed and click on the Post Active Inspection button.

## Posted Inspection Form

### Posted Inspection Browse

The Posted Inspection Form is displayed in browse mode below. Posted Inspections are created by posting an Active Inspection. You cannot add a new inspection directly to this table.

The screenshot shows a web application window titled "Posted Inspection Form". On the left is a sidebar with search options: "Criteria:" (set to 0), "Sort Order" (INSPECTION ID), "Filter" (NO FILTER), "Type Search" (FIND FIRST), and "Max. Records" (100). The main area contains a table with the following data:

INSPECTION ID	SCHEDULED DATE	COMPLETED	LOCATION CODE	EMPLOYEE CODE
5	2/20/2011	2/23/2011	GEORGIA WAREHOUSE	GRAY, MARK N.
6	11/26/2011	11/30/2011	FLORIDA SHOP	DAVIS, ALBERT C.
7	8/20/2011	8/30/2011	GEORGIA WAREHOUSE	CRAWFORD, LARRY M.
8	3/1/2012	3/7/2012	FLORIDA SHOP	KIRKLAND, LANNY P.
9	3/1/2012	3/10/2012	GEORGIA WAREHOUSE	DAVIS, ALBERT C.
10	5/20/2012	5/23/2012	FLORIDA SHOP	LEWIS, JR. TOMMY

At the bottom of the window, it says "Record 1 of 6".

### Posted Inspection Edit

The Posted Inspection Form is displayed in edit mode below. You can change information about the inspection if necessary. Often the form is made read only through the security system. This prevents users from inadvertently changing information on a Posted Inspection. If any of the information entered needs to be updated it can be updated here. All of the information from the Active Inspection can be viewed or updated.





Posted Inspection Form



Save & New Save Undo Help

Inspection ID:  Completed Date/Time: 11/26/2011 5:05:00 PM

Inspection Info Check List Recommendations PDF Files Pictures

Scheduled Date: 11/26/2011

Employee Code: DAVIS, ALBERT C.  

Location Code: FLORIDA SHOP  

Location Description: INSPECT THE LOADING DOCK

Notes:

## Training Module

### Training Schedule Form

The Training Schedule Form is displayed in browse mode. This lists all of the active training classes that have been scheduled. You can create an unlimited number of training classes.

The screenshot shows the 'Training Schedule Form' window. On the left is a sidebar with controls: 'Criteria:' (empty), 'Sort Order: TRAINING ID' (dropdown), 'Filter: NO FILTER' (dropdown), 'Type Search: FIND FIRST' (dropdown), and 'Max. Records: 100'. Below these are navigation buttons. The main area is a table with columns: TRAINING ID, CLASS STATUS, START DATE/TIME, TRAINING CLASS CODE, LOCATION CODE, and LOG. Two records are visible. The status bar at the bottom indicates 'Record 1 of 2'.

TRAINING ID	CLASS STATUS	START DATE/TIME	TRAINING CLASS CODE	LOCATION CODE	LOG
1	OPEN	8/17/2012	FORK LIFT 101	FLORIDA SHOP	MEL
2	OPEN	8/20/2012	WAREHOUSE MANAGEMENT	FLORIDA SHOP	CON

The Training Schedule Form is displayed in edit mode. You can select a Training Class Code and a Location Code. You can enter notes and a more detailed description of the location of the class. This might be a conference room or some other location within your facility. You can then select the person who will be leading the class. The remaining information employee information is filled in from the Employee Master Table.

The screenshot shows the 'Training Schedule Form' window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo', and a 'Help' button. Below these, there are fields for 'Incident ID' (with a dropdown arrow) and 'Status' (set to 'OPEN'). The main area has three tabs: 'Class Information', 'Class Participants', and 'PDF Files'. The 'Class Information' tab is active, showing 'Training Class Info' and 'Trainer Info' sections. The 'Training Class Info' section includes fields for 'Training Class Code' (2010K412B001), 'Start Date' (8/17/2012), 'End Date' (8/17/2012), 'Location Code' (FLORIDA SHOP), 'Notes' (BASIC CLASS FOR NEW HIRES IN ON OPERATING A FORK LIFT), and 'Location Description' (MEET IN CONFERENCE ROOM AT 9:00 AM). The 'Trainer Info' section includes fields for 'Trainer Is Employee' (checked), 'Employee Code' (BEEMER, TOMMY), 'Trainer Name' (TOMMY BEEMER), 'Job Title' (WAREHOUSE 2), 'Work Phone' ((904) 381-0020), and 'Cell Phone' ((904) 716-4989).

You can click on the Class Participants Tab to display the window below. You can add an unlimited number of participants to a class. Simply click on the new button to add another participant.

The screenshot shows the 'Training Schedule Form' window with the 'Class Participants' tab active. At the top, there are buttons for 'New', 'Edit', and 'Delete', and a 'Help' button. Below these, there is a table with columns: 'LAST NAME', 'FIRST NAME', 'JOB TITLE', 'WORK PHONE', 'CELL PHONE', 'EMAIL', and 'NOTES'. The table contains four rows of participant information. Below the table, there is a status bar that says 'Record 1 of 4'.

LAST NAME	FIRST NAME	JOB TITLE	WORK PHONE	CELL PHONE	EMAIL	NOTES
CRAWFORD	LARRY	DRIVER	(904) 381-0023	(904) 716-4579	L.CRAWFORD@FLEETWISEVB.COM	
GRAY	MARK	WAREHOUSE 2	(904) 381-0023	(904) 716-4579	M.GRAY@FLEETWISEVB.COM	
LARRISON	WILLIAM	WAREHOUSE 1	(904) 381-0024	(904) 716-4579	W.LARRISON@FLEETWISEVB.COM	
SIZELAND	AMANDA	DRIVER	(904) 381-0016	(904) 716-4579	A.SIZELAND@FLEETWISEVB.COM	

The Class Participant is displayed in edit mode below. You can select the employee. The remaining information is displayed from the Employee Master Table. When the class is completed you can put a check in the Past check box if the employee passed the class.

The screenshot shows the 'Training Schedule Form' window. At the top, there are buttons for 'Save & New', 'Save', and 'Undo'. Below these, there are fields for 'Incident ID' (containing '1') and 'Status' (a dropdown menu set to 'OPEN'). The 'Class Information' tab is selected, showing a sub-menu with 'Save & New', 'Save', and 'Undo' buttons. The form contains the following fields:

- Employee Code: CRAWFORD, LARRY M
- Employee Name: LARRY M CRAWFORD
- Job Title: DRIVER
- Email: L.CRAWFORD@FLEETWISEVB.COM
- Notes: (empty text area)
- Work Phone: (904) 381-0023
- Cell Phone: (904) 716-4579
- Employee Number: 14
- Passed: ☒ Yes

You can add an unlimited number of PDF files to the class. Simply click on the new button to add another PDF File.

The screenshot shows the 'Training Schedule Form' window with the 'PDF Files' tab selected. The sub-menu now includes 'New', 'Edit', 'Delete', and 'View PDF' buttons. A table is displayed with the following columns: DATE, FILE NAME, DESCRIPTION, and FILE NAME. The table contains one record:

DATE	FILE NAME	DESCRIPTION	FILE NAME
8/2/2012	OTHER DOCUMENT	SAFETYWISE ORDER FORM	C:\USERS\PUBLIC\DOCUMENTS\SAFETYWISE\ORDERFORM.PDF

At the bottom of the window, it says 'Record 1 of 1'.

The PDF File tab is displayed in edit mode below. You can enter a PDF Type and a description. Then click on the Pick PDF button to select the PDF file.

## Post Training Class

Click on the Post Training Class button on the Training Schedule Browse Form to display the window below. This will create a history for each employee of the class they attended.

## Training History Form

### Training History Browse

The Training History Form is displayed in browse mode below. You do not add record directly to this form. You create a Class in the Training Schedule Form and then Post the class to create records in the Training History Form.

TRAINING ID	START DATE/TIME	LAST NAME	FIRST NAME	TRAINING CLASS CODE	LOCATION CODE
1	3/21/2011	CRAWFORD	LARRY	FORK LIFT 101	FLORIDA SHOP
2	11/17/2011	CRAWFORD	LARRY	FORK LIFT 201	GEORGIA SHOP
3	4/20/2012	DAVIS	ALBERT	WAREHOUSE MANAGEMENT	FLORIDA SHOP
4	7/20/2012	DAVIS	ALBERT	DRIVING 101	FLORIDA SHOP
1	3/21/2011	GRAY	MARK	FORK LIFT 101	FLORIDA SHOP
2	11/17/2011	GRAY	MARK	FORK LIFT 201	GEORGIA SHOP
3	4/20/2012	LAILER	PETER	WAREHOUSE MANAGEMENT	FLORIDA SHOP
4	7/20/2012	LAILER	PETER	DRIVING 101	FLORIDA SHOP
1	3/21/2011	LARRISON	WILLIAM	FORK LIFT 101	FLORIDA SHOP
2	11/17/2011	LARRISON	WILLIAM	FORK LIFT 201	GEORGIA SHOP
3	4/20/2012	ROBERTS	DONNIE	WAREHOUSE MANAGEMENT	FLORIDA SHOP
4	7/20/2012	ROBERTS	DONNIE	DRIVING 101	FLORIDA SHOP
1	3/21/2011	SIZELAND	AMANDA	FORK LIFT 101	FLORIDA SHOP
2	11/17/2011	SIZELAND	AMANDA	FORK LIFT 201	GEORGIA SHOP
3	4/20/2012	SIZELAND	AMANDA	WAREHOUSE MANAGEMENT	FLORIDA SHOP
4	7/20/2012	SIZELAND	AMANDA	DRIVING 101	FLORIDA SHOP
3	4/20/2012	THOMAS	MARK	WAREHOUSE MANAGEMENT	FLORIDA SHOP
4	7/20/2012	THOMAS	MARK	DRIVING 101	FLORIDA SHOP

### Training History Edit

The Training History Form is displayed in edit mode below. This shows the class information for a single employee. All of the information can be changed if necessary. Often this form is made read only in the Security System, to prevent users from changing the history.

Training History Form

Save Undo Help

Training Class Info:

Incident ID:

Training Class Code:

Start Date:

End Date:

Location Code:

Notes:

Location Description:

Employee Info:

Passed: ☒ Yes

Employee Number:

Trainer Name:  M

Job Title:

Work Phone:

Trainer Info:

Trainer Is Employee: ☒ Yes

Trainer Name:

Job Title:

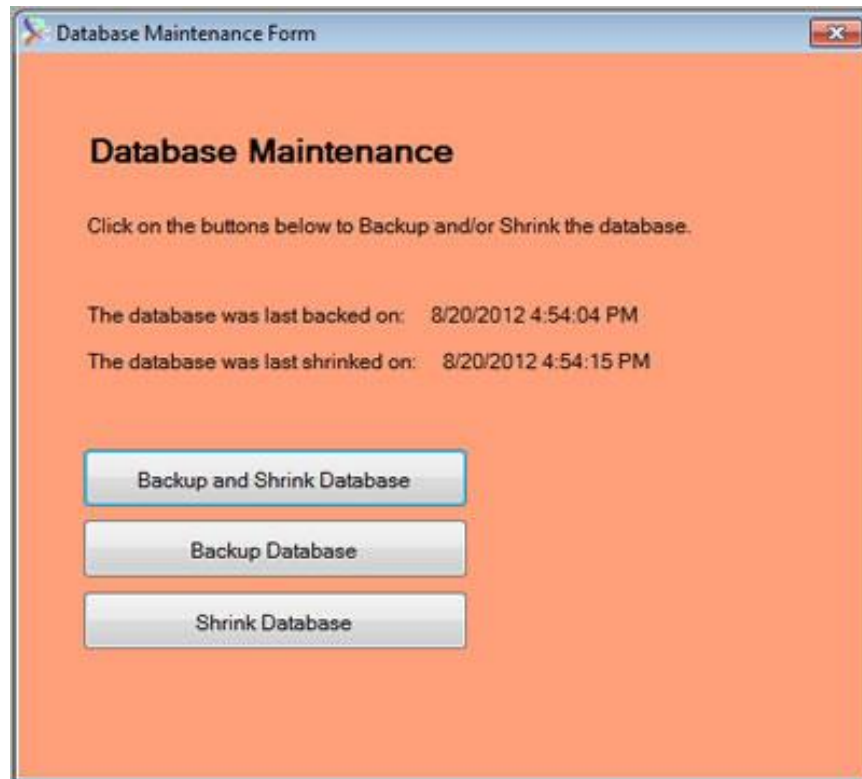
Work Phone:

Cell Phone:

## Utilities

### Database Maintenance Form

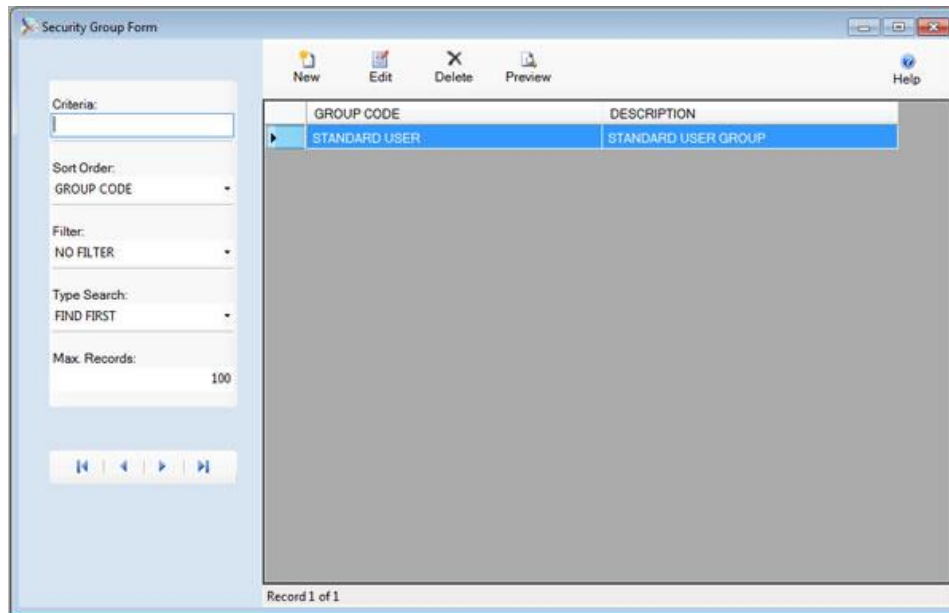
The Database Maintenance Form is displayed below. This form is used to backup and to shrink the database. The Backup function will save a backup copy of the database on the hard drive where SQL Server is running. If you are running a network version of the software, you must backup the database to the server. Shrinking the database will recover space occupied by deleted records. Both functions should be run on a regular basis.

The screenshot shows a window titled "Database Maintenance Form" with a standard Windows-style title bar (minimize, maximize, close buttons). The main area has an orange background. At the top, the text "Database Maintenance" is displayed in bold. Below it, a message says "Click on the buttons below to Backup and/or Shrink the database." Further down, two lines of text provide status information: "The database was last backed on: 8/20/2012 4:54:04 PM" and "The database was last shrunk on: 8/20/2012 4:54:15 PM". At the bottom, there are three stacked buttons: "Backup and Shrink Database" (highlighted with a blue border), "Backup Database", and "Shrink Database".

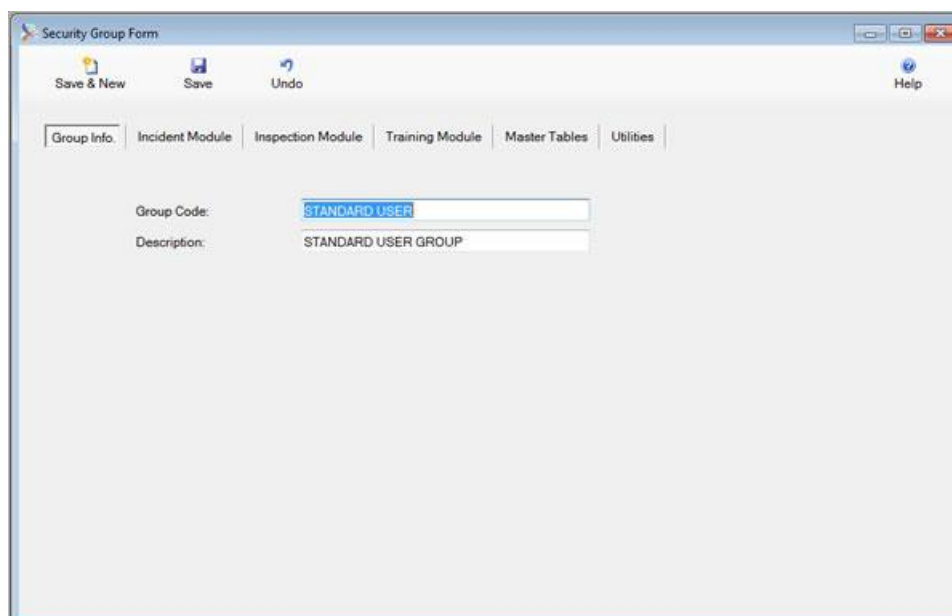
### Security Group Form

The Security Group form is displayed in edit mode below. This form allows you to create a user group. You enter a group code and Descriptions. You can then click on the tabs to determine what functions the users will have access to.

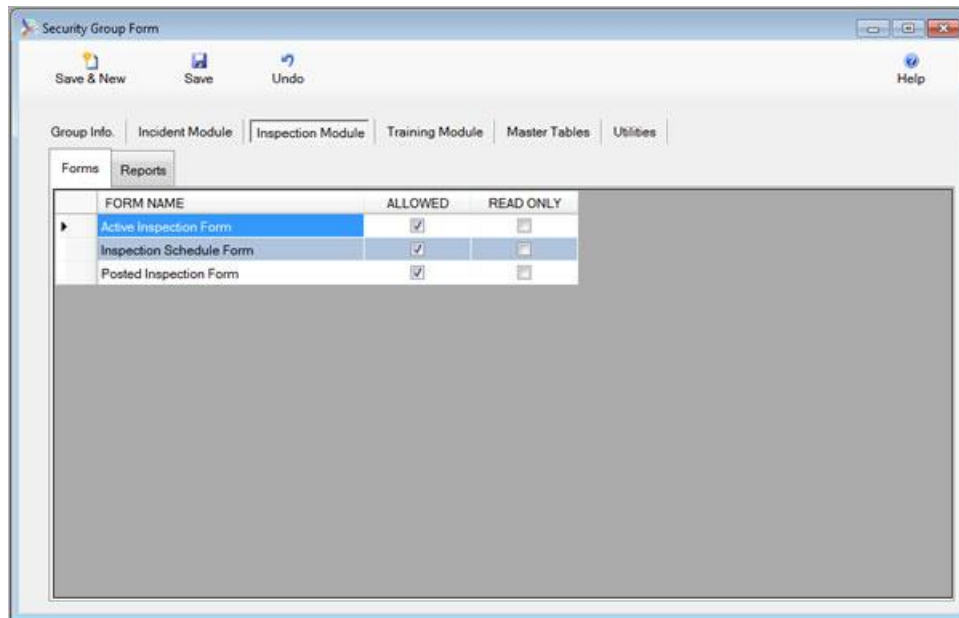




The Unit Tables tab is displayed below. The items in the list correspond to the menu options under the Unit Tables menu. Remove a check mark from the ALLOWED column to prevent a user from having access to that menu option. Put a check mark in the READ ONLY column to allow the user to view information but not add, change or delete the information. Click on the reports tab, to allow or prevent of user from accessing reports. The remaining tabs work the same way.



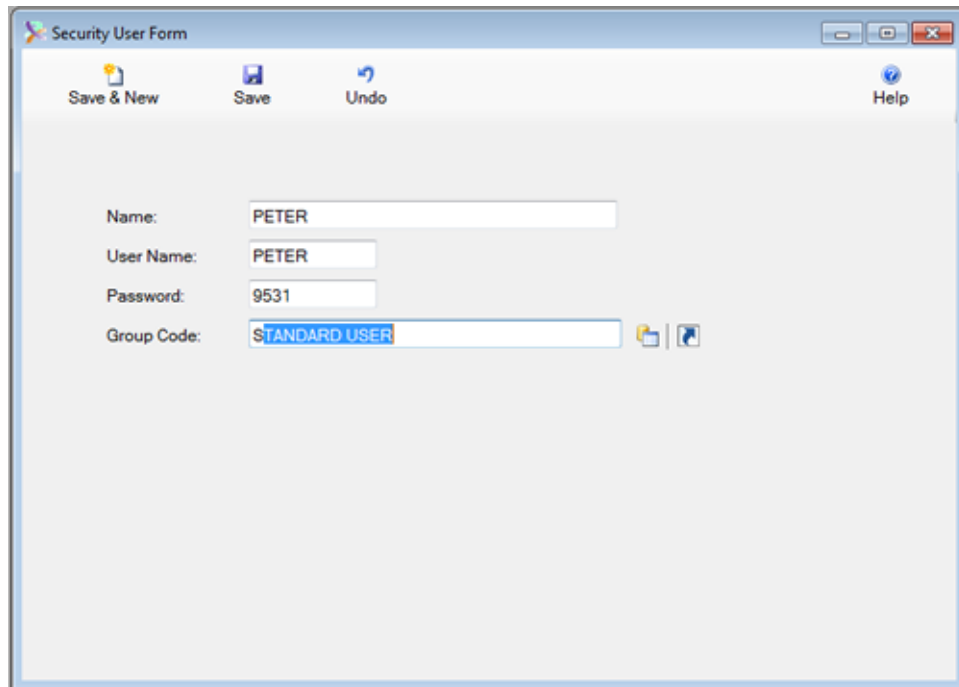
The Inspection Module Tab is displayed below. Users will have access to any items with a check mark in the Allowed box. Users will have read only access to items where with a check in the Read Only box. Users will not have access to items without a check in the Allowed box.



FORM NAME	ALLOWED	READ ONLY
Active Inspection Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Inspection Schedule Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Posted Inspection Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Security User Form

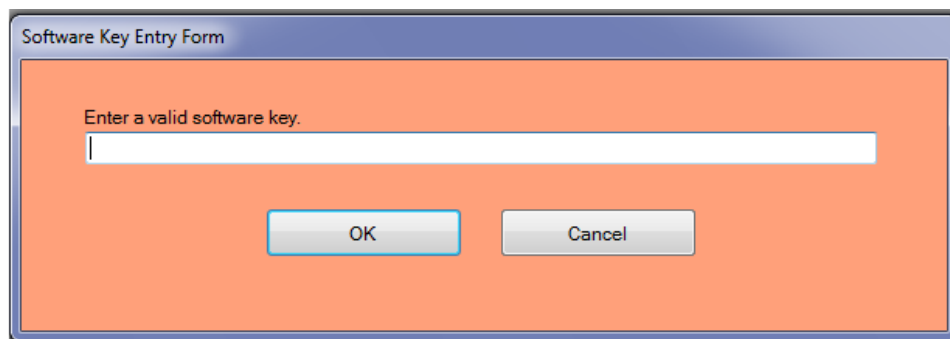
The Security User Form is displayed below. Each user of the SafetyWise System should be set up in this form. You can enter the users, name, user name password, and group code. The user name and password will be required on the login form. The name will be stored when inventory transactions and other transactions are created. The group code will determine the functions the user has access to.



The screenshot shows a window titled "Security User Form". At the top, there is a menu bar with four items: "Save & New", "Save", "Undo", and "Help". Below the menu bar, there are four input fields with labels to their left: "Name:" with the value "PETER", "User Name:" with the value "PETER", "Password:" with the value "9531", and "Group Code:" with the value "STANDARD USER". To the right of the "Group Code" field, there are two small icons: a folder icon and a person icon.

## Software Key Entry Form

The Software Key Entry Form is displayed below. This form is used to input the software key. The software key determines what options within the SafetyWise program are available.



The screenshot shows a dialog box titled "Software Key Entry Form". The background of the dialog box is orange. Inside, there is a text label "Enter a valid software key." followed by a single-line text input field. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

## System Control Form

The System Control Form is displayed below. On the first tab you can enter information about your company. The company name will appear at the top of SafetyWise Program and at the top of all reports.

The screenshot shows a software window titled "System Control Form". At the top, there are three buttons: "Save", "Undo", and "Help". Below these buttons, there are two tabs: "Company Info" and "Reminders". The "Reminders" tab is currently selected. The main area of the window contains several input fields for company information:

- Company Name:** A text box containing the placeholder text "YOUR COMPANY NAME".
- Address:** Three stacked text boxes for entering the address.
- Phone Number:** A text box for entering the phone number.
- Fax Number:** A text box for entering the fax number.
- DB Version:** A text box containing the value "6.0.0.0".

## SafetyWise Reports

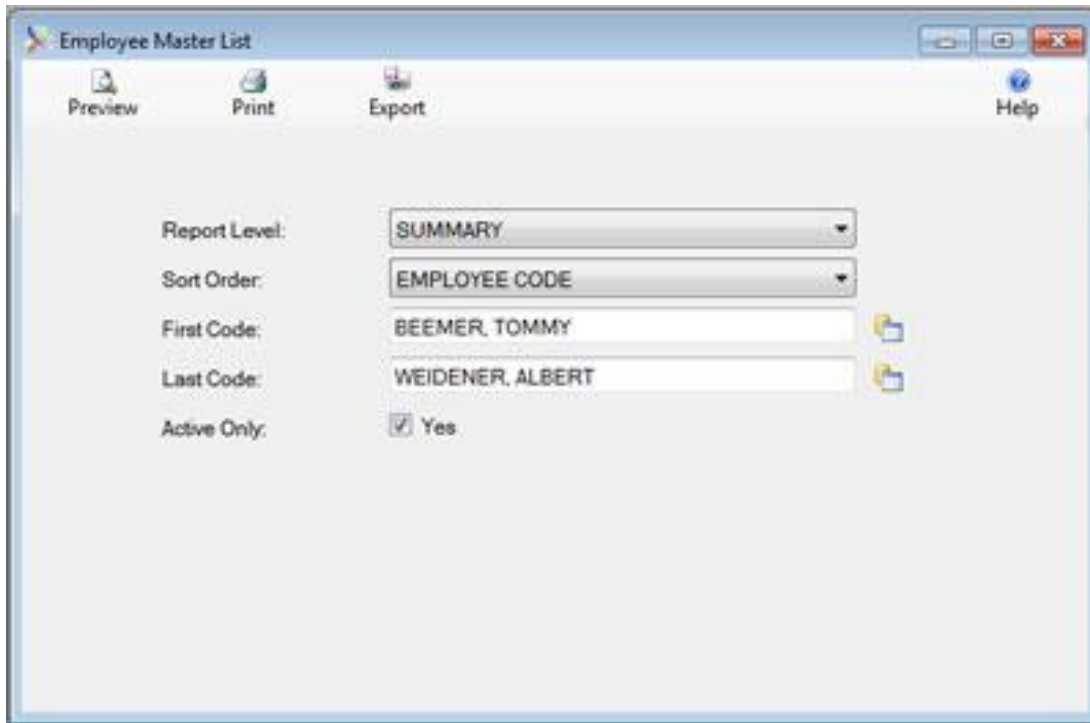
The SafetyWise System contains a large number of standard reports. Many of these reports can be sorted or grouped in different ways.

At the bottom of each menu is a Reports Sub Menu. For example, at the bottom of the Incident Tables, is a Reports Sub Menu. This menu provides access to reports that pertain to the Incident Master Form.

The best way to determine the reports you wish to print is view the report on your computer screen. You can then send the report to the printer or export the report.

### Sample Report Form

Below is the Employee Master Lists report form. All of the Report Forms work in much the same way as this form.

The image shows a screenshot of a software window titled "Employee Master List". At the top, there are four buttons: "Preview", "Print", "Export", and "Help". Below these buttons, there are five input fields. The first two are dropdown menus: "Report Level:" with "SUMMARY" selected, and "Sort Order:" with "EMPLOYEE CODE" selected. The next two are text boxes: "First Code:" containing "BEEMER, TOMMY" and "Last Code:" containing "WEIDENER, ALBERT". To the right of these text boxes are two small folder icons. The final field is "Active Only:" with a checked checkbox and the word "Yes".

In the first box, you can select from several report levels.

The second box provides the ability to sort, and group the items on the report. In this case, selecting the sort order "Employee Code" displays a list of all Employees. Selecting the sort order "Department Code" displays a list of units Grouped by Department.

The First Code box can be used to select the first code to appear on the report. The Last Code box can be used to select the last code to appear on the report. For example, if you wanted a list of all of the reports in the “Administration” department, you could make the sort order “Department Code” order and select the “Administration” department for the First Code and for the Last Code. This would display a report of vehicles and equipment in the administration department only.

Finally, you can place a check mark in the Active box to list only active units.

## Preview Window

Click on the Preview Button to display the report on the computer monitor. It will appear similar to the window below.

EMPLOYEE CODE	ACTIVE	FIRST NAME	LAST NAME	WORK PHONE	EXTENSION	CELL PHONE	PAGER	HOME PHONE
BEEMER, TOMMY	Yes	TOMMY	BEEMER	(904) 381-0020	4	(904) 718-4989		(904) 718-4579
BOATWRIGHT, DUANE	Yes	DUANE	BOATWRIGHT	(904) 381-0024		(904) 718-3466		(904) 718-1463
BOATWRIGHT, EARNIE	Yes	EARNIE	BOATWRIGHT	(904) 381-0020		(904) 718-4989		(904) 718-4521
BOATWRIGHT, HENRY E.	Yes	HENRY	BOATWRIGHT	(904) 381-0023		(904) 718-4579		(904) 718-4579
BUCHANAN, WENDEL	Yes	WENDEL	BUCHANAN	(904) 381-0020		(904) 718-3466		(904) 718-4521
CALDWELL, ALBERT N.	Yes	ALBERT	CALDWELL	(904) 381-0024		(904) 718-4989		(904) 718-1463
CONWELL, JAMES	Yes	JAMES	CONWELL	(904) 381-0020		(904) 718-4579		(904) 718-4521
CRAWFORD, LARRY M.	Yes	LARRY	CRAWFORD	(904) 381-0023		(904) 718-4579		(904) 718-4579
DAVIS, ALBERT C.	Yes	ALBERT	DAVIS	(904) 381-0024		(904) 718-4989		(904) 718-4521
FEHRMAN, THOMAS J.	Yes	THOMAS	FEHRMAN	(904) 381-0016		(904) 718-4579		(904) 718-1463
CRAY, MARYAN	Yes	CRAY	CRAY	(904) 381-0023		(904) 718-4579		(904) 718-4579

## Report Viewer Toolbar

A toolbar is displayed at the top of the Preview Window.



Toolbar Buttons:

- The first button allows the report to be exported in many popular formats including as an Excel worksheet.

- The second button sends the report to the printer.
- The third button refreshes the report view.
- The fourth button displays a Group Tree to the left of the report. This can make navigating a long report very easy. You can click on a group and the report window will jump to that group.
- The fifth button moves to the first page of the report.
- The sixth button moves to the previous page of the report.
- The seventh button moves to the next page of the report.
- The eighth button moves to the last page of the report.
- The box displays the current page number.
- Clicking the binoculars displays a search form. You can type a string and the report will display the first occurrence.
- Finally, the binoculars with the plus sign, provides the ability to zoom in or out the display.

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