

H&S Compliance Manager - Installation and training session # 1

Scope – half day - to get contacts, install system, setup system, train key person, logins, import employees, brief training on employees, getting initial training up to date, certificates and licences.

Note: These are trainer reminder notes, and are not suitable for an end user.

Identify key people

- **Manager** - purchase approval
- **Accounts** person –for invoicing
- **Administrator** – the person who will take overall responsibility for the HSE system – often HSE manager / Ops manager/ HR person
- **IT person** – responsible for locating where software will be installed
- **Payroll person** – person responsible for ensuring the employee information will be merged from the payroll into HSE
- **Primary Users** – use on day to day basis

Installation

- Plan installation and training with Administrator (Safety/HR) - 10/15 mins
- Brief discussion with IT person – 10 mins
 - Install software on server – 10 mins
 - Setup SMTP server information with IT in Company record (can be left for later)
- Brief discussion with Payroll person & key person – 10 mins
 - Import employees from payroll – 5 mins
 - Review results from importing employees (15 min)
 - Departments created
 - Job types created vs payroll positions
 - Employment types
 - Update payroll import options if necessary
 - If necessary, delete the system and reinstall with new options
 - Set up login for payroll person & explain the import process – 10 mins. Show how to export from IMS (or other payroll), import to HSE, check the latest import date, how to force an import and get them to do a test to ensure they are happy with process.

Setup system – with key person (who will administer HSE)

- Change company & site names
- Update company addresses
- Register system (requires code from CSL)
- Set up System Administrator (person to receive notifications / often H&S person and HR Administrator in Company data.
- Setup Event notification From and reply to in Company data
- Ensure the System Administrator and HR Administrator have email addresses in employee records
- Set up user login for System Administrator (System Administrator security group)
- Set up user login for HR Administrator (System Administrator security group)
- Turn off prompt for User ID = Demo
- Get the System Admin to log in and check it works
- Terminate the employee called Demo Employee – this results in the demo / demo login being removed (can be left if required as a backup login).
- Delete the terminated employee called demo employee

Administrator Training (includes System Admin & HR Admin)

Employees (brief tour)

- How to Add (manually) / change (or double click) / terminate employees
- Review tabs in employee data
- Personal/Contact tab – comes in from payroll but important to get work email for key users

- Employment Tab – start date, employment type, department, Job Type (sometimes called Job title) all come from payroll if options set, Reports to (another employee) can be set, Current status / End date will terminate employee (but will be overridden from payroll. Data goes from payroll then to HSE.
- Employment HR Tab – All tabs with HR can only be seen by HR Administrator or anyone HR Administrator gives access to via their employee login. All data here is expressly for HR. Payroll department and Payroll position as per the payroll (c.f. Department / Job Title in Employee tab).
- Good time to talk about optimising departments and job types to lesson work. If required to change good time to do this now and remove all departments and job types from Edit / Departments, Edit Job types, change option in Payroll import then annually enter new departments and job types and allocate these to employees.
- Back into Employee records look at Crisis contact (next of kin). Good time to show how list tagging of records occurs and reporting of only tagged records by tagging one record in employee list, go to employee reports and print Personal Details Worksheet (a report which can be given to staff to get required details in). Explain that this report can be run every six months for staff and corrections made by staff. Corrections go first to payroll to have employee details updated in payroll then to HSE to have crisis contact details updated.
- That is enough for employees at this stage.

Training (brief)

- Ask the user if they have some training records they need to get in eg: First aid or internal training (keep away from forklift training at this stage because sometimes users do not distinguish between the forklift endorsement on the training license, which is renewed when the licence is renewed and the the OSH required 3 yearly forklift operator training)
- Get the dates training was completed for the employees who have completed the training.
- Create some training topics via Edit / Training Topics. Add a couple of topics – can also add supplier if required at this stage.
 - To add training supplier press add over list of training suppliers – make sure that the Training Provider is ticked on else supplier will not show in list of training suppliers.



Good time to show how when a lookup list of (say training providers/suppliers) is shown for selection, an entry can be added to the lookup list by pressing add. After it has been added it may be selected from the list by pressing the select button or by double clicking to select. Explain that this is the same for most selection lists in the system.

- Go to the Training icon on the toolbar – good time to show the difference between the toolbar with often used icons and the menu above it which has everything (Training by topic in the menu is the same as the little man with a wand on the toolbar).
 - Select a training topic – press the button at the top – this brings the delivery method and provider in at the bottom under For All Tagged People.
 - Initially there will be no staff already trained so none will show in the list. To show all staff click the Show All Staff (top right) and all staff will be shown.
 - Tag all the staff who were trained on the same date (reinforces the tagging they used with employees), then place the date the staff were trained at Date (under For All Tagged People). Press Complete Training. This will update the training for the tagged staff and also reschedule them for training in the future if there is a repeat frequency on the training topic.
 - If they forgot to put a repeat frequency on the training topic, from the training window press Edit Topic. Update the frequency and press OK, This will apply the new frequency to all the staff with outstanding training.
 - Next highlight one of the trained staff, press the Last training button which shows the record for that past training. Here any corrections may be made if necessary,

the certificate Number updated and any copies of attachments added to the record.

- Can show how attachments works if a have a pdf copy of a certificate handy (same throughout the system). Press the attachments button which shows no attachments so far. Press add Attachment – select file and point to the pdf of the certificate. Press Save attachment. Back in the attachments list double click over the attachment to show the pdf attachment in a window. If it does not show, the user needs to have Adobe Pdf installed on their computer. Attachments are shown either in a Internet Explorer window or Adobe PDF window if a pdf. Best not to add word docs but can if necessary. Close the list of attachments. Back in the Update Training History the add attachments button has turned yellow showing there is at least one attachment. Click OK to save and exit the training History.
- Get the user to update the training for all the other people who did the same topic.
- When complete, print a topic report from the training screen.
- Then go to the menu / training, select Export Training required matrix to excel and then print to excel. This shows departments and staff down rows and training topics along columns with the date training is required in the cells with colour coding for over-due, due soon and due within 60 days.
- NOTE: Getting all employees training up to date is very quick and gives the user lots of experience using the system as well as some added value from the training. There is an opportunity to discuss the difference between training topics and certificates and licences. Generally Certificates and Licences should only be used where there is a licence with endorsements (eg: Driver's licence).

Certificates & Licences

- Go to Edit Certificates and Licence types. (Illustrates that static files are accessed from edit). Press Add to add a new Licence. Key in Drivers Licence then go down to the endorsements underneath and press add and key in the all the driver licence endorsement types 1- light, 2... RTW, F... This is a good time to show the application help – which has a list of all of the drivers licence endorsements. Press The help on the Toolbar which will open up a window with application help from the CSLNZ web site (if it does not open then IT must allow users access to the following domains www.cslnz.co.nz and www.hse.co.nz), in the search key "drivers" then press Go, on the left click drivers licence classes and endorsements to show a list). When finished click close (top right of the window to get rid of help). Help can be left open and repositioned if required.
- Now go back to Training from the toolbar and Press the Licences and Certificates button at top right. This opens a window of employees on the left. Highlight an employee on the left and press Add Certificate/Licence on the right, select Driver Licence from the dropdown, key in expiry date and the licence number then select each endorsement the employee has on the right and press the left arrow which move the endorsement into the employee licence record. If required add attachment of licence then press OK to save the employee's license. The user can do the rest later.

This is a good time to take a break as the user has probably had enough by now. If required you could organise the user to get all the other licences and certificates and training up to date. Give them your phone no if they get stuck or 0800 number. Organise the next training session in the afternoon or a couple of days later.