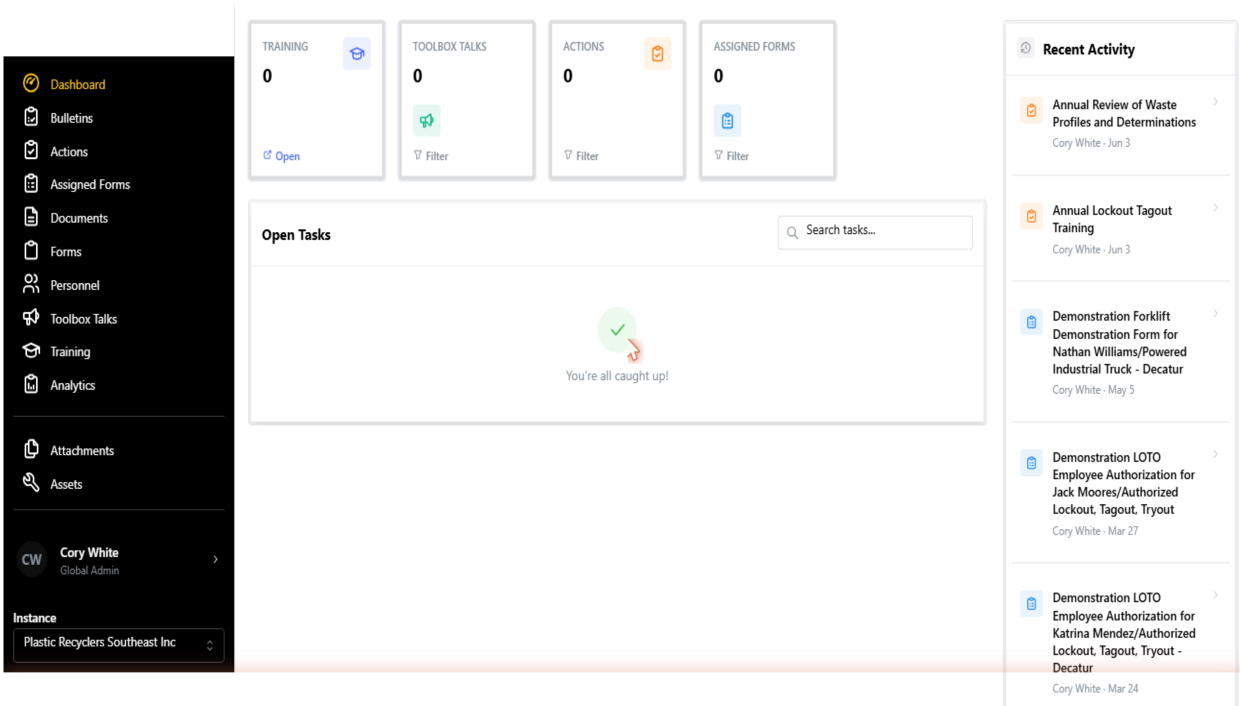
Administrator How-To Guide

Step-by-step instructions for all admin workflows

June 2026

ProactEHS Navigation Overview

ProactEHS uses a dark left sidebar for navigation. All major modules are listed there. At the top of the sidebar you will see the ProactEHS logo, and below it the list of modules available to you based on your instance configuration.



The main content area (to the right of the sidebar) changes based on which module you click. Yellow buttons (like + Create or + New) are action buttons — they always start a new item. Colored status badges (green = active/complete, blue = open, yellow = draft) tell you the state of each item at a glance.

> **Note:** The modules visible in your sidebar depend on which features are enabled for your ProactEHS instance. If you don't see a module listed here, it may not be enabled for your organization.

> **Tip:** If you are ever unsure where to go, look for the module name in the left sidebar and click it. Every workflow in this guide starts from the sidebar.

Personnel — Managing Your Employees

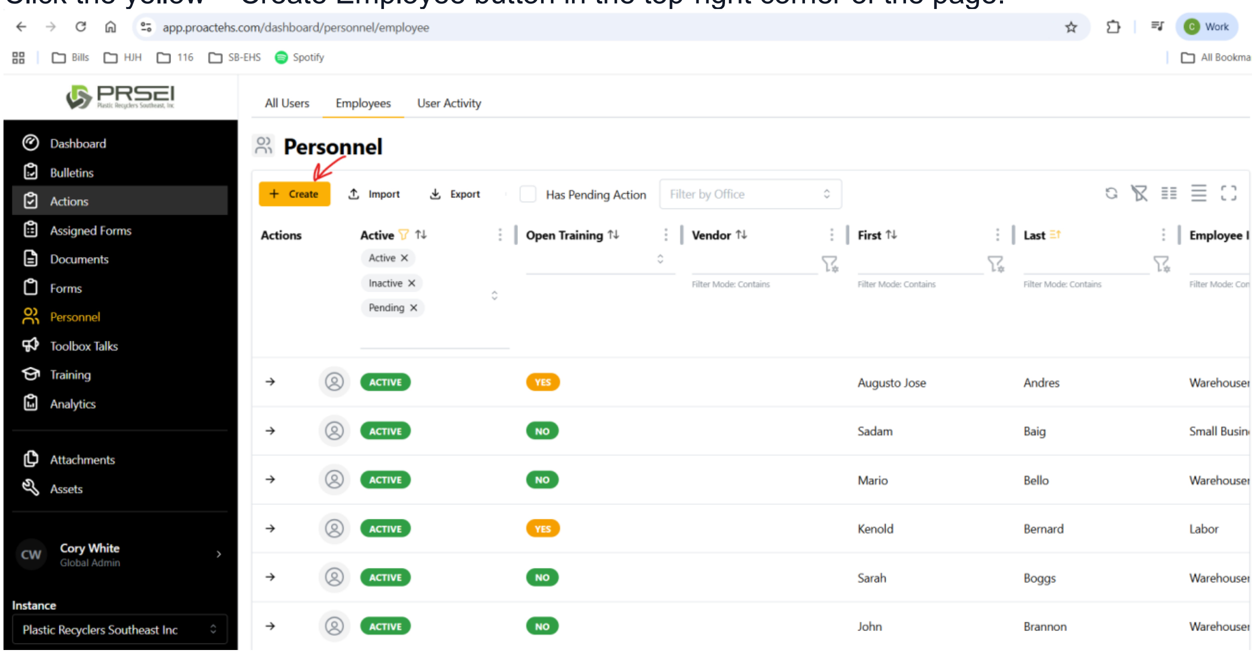
The Personnel module is where you manage all people in your organization — employees and contractors. From here you can add new employees, view their profiles, manage their training, reset passwords, and more.

Adding a New Employee

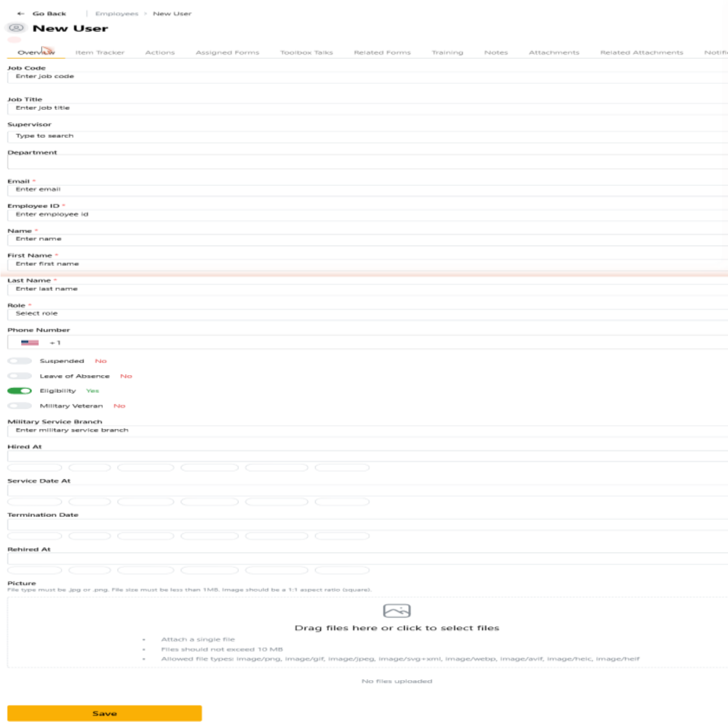
Use this workflow any time you need to add a new person to ProactEHS. This creates their account and allows you to assign them training, forms, and actions.

> ⚠ **Important:** You must go to Personnel > Employees tab to create a new employee. Do NOT use the 'All Users' tab for this — the 'All Users' tab is for viewing only. The Employees tab has the '+ Create Employee' button.

1. Click Personnel in the left sidebar.
2. At the top of the page, you will see several tabs: All Users, Employees, Contractors, and Archived. Click the Employees tab.
3. Click the yellow + Create Employee button in the top-right corner of the page.



4. The Create Employee form will open. Fill in all required fields (marked with *):
   - First Name * and Last Name * — the employee's full name.
   - Email * — the employee's work email address. This is what they will use to log in.
   - Employee ID * — a unique identifier for this person (e.g., EMP-0042). You can use any format your organization uses.
   - Role * — select User for a standard employee, or Admin if they will manage the system.



5. Fill in any optional fields as needed: Job Title, Supervisor, Department, Office, and Phone Number.
6. Click Save. The employee will be added to the system and will receive a welcome email with login instructions.

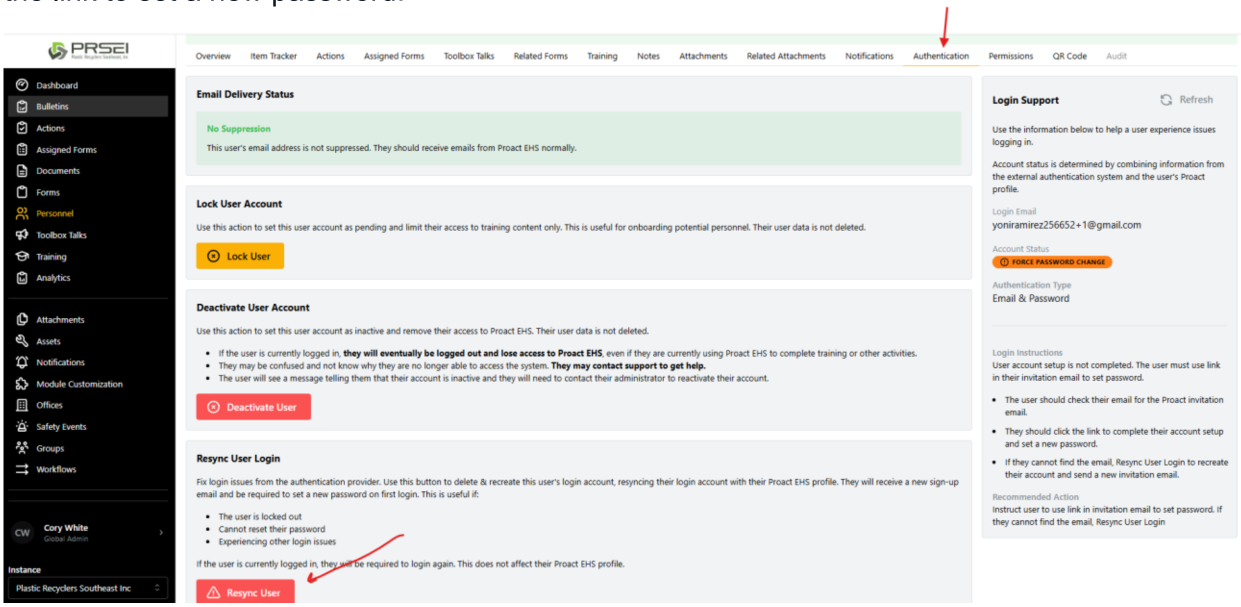
> 💡 **Note:** After creating the employee, they will receive an email invitation to set up their password. If they don't receive it, you can resend it using the Authentication tab — see the 'Resetting an Employee's Password' section below.

Resetting an Employee's Password

If an employee is locked out, forgot their password, or can't log in, use this workflow to help them regain access.

1. Click Personnel in the left sidebar.
2. Find the employee using the search bar or by scrolling the list. Click the arrow (→) next to their name to open their profile.
3. On the employee's profile page, click the Authentication tab.
4. On the right side of the screen you will see the Login Support panel. This shows their current login email and account status.
5. Scroll down to the Resync User Login section. Click the red Resync User button.

6. The employee will receive a new invitation email. Tell them to check their inbox and click the link to set a new password.



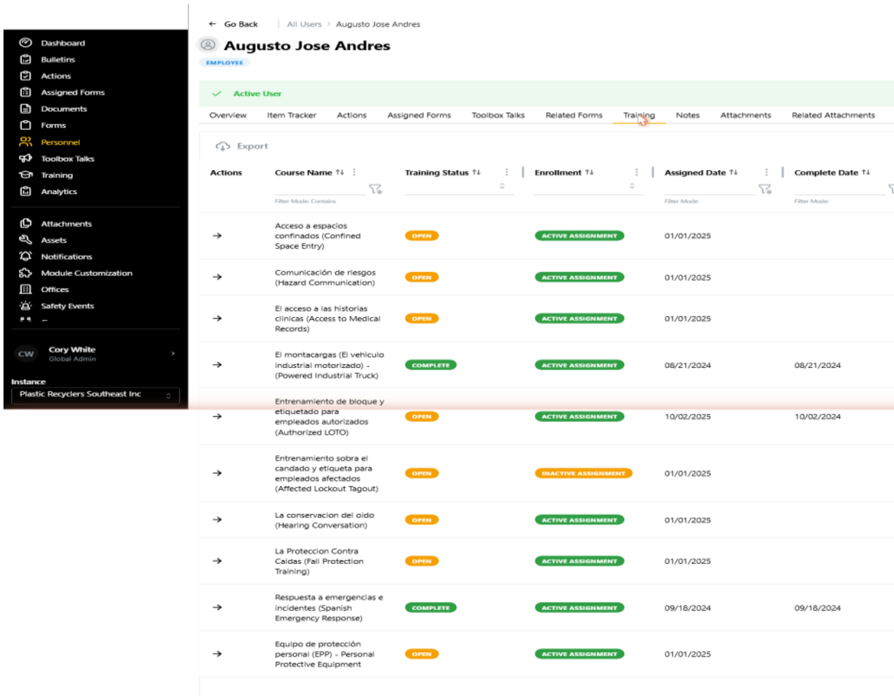
💡 **Note:** Resync User Login deletes and recreates the employee's login credentials. It does NOT delete any of their data or assignments.

ℹ **Tip:** You can also use the Lock User Account toggle on this tab to temporarily prevent someone from logging in without deleting their account.

Viewing an Employee's Training & Certifications

You can check any employee's training history, completion status, and certification records from their profile.

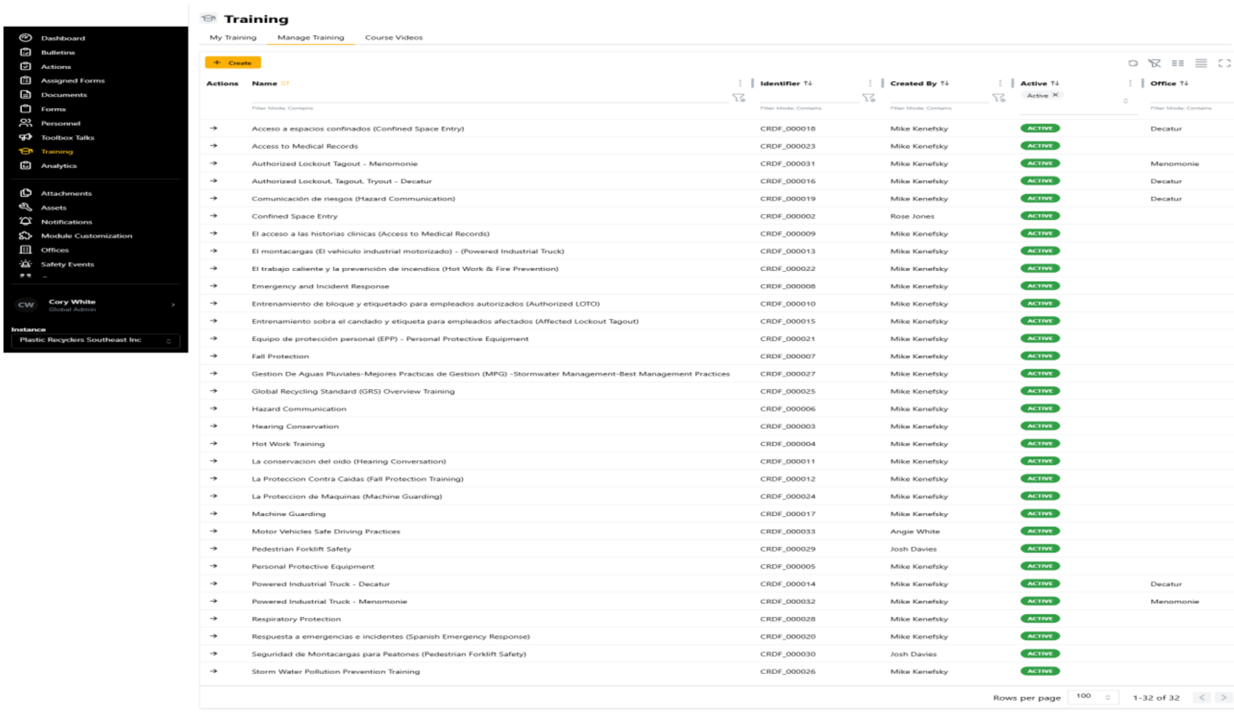
1. Click Personnel in the left sidebar.
2. Find the employee and click the arrow (→) next to their name.
3. On their profile, click the Training tab.



4. The Training tab shows every course this employee has been assigned, with the following details:
   - Training Status — OPEN means not yet completed; COMPLETE means they finished the course.
   - Assigned Date, Due Date, Complete Date — important deadline and completion dates.
   - Enrollment — shows ACTIVE ASSIGNMENT for courses currently assigned.
5. Click the arrow (→) next to any course to view the full certification record.
6. Click Export (top-right of the Training tab) to download this employee's training report as a spreadsheet.

Training — Managing Courses and Assignments

The Training module lets you create and manage training courses for your employees. It has two main areas: Manage Training (the course list) and Course Videos (the video library, also called the LMS). Courses are identified by CRDF_XXXXXX codes in the system.



Navigating the Training Module

1. Click Training in the left sidebar.
2. You will see two tabs at the top of the page:
   - Manage Training — the list of all training courses. This is where you create, edit, and assign courses.
   - Course Videos — the LMS video library. Upload video-based training content here.
3. Click the arrow (→) next to any course to open it and see its details, content, and enrolled employees.

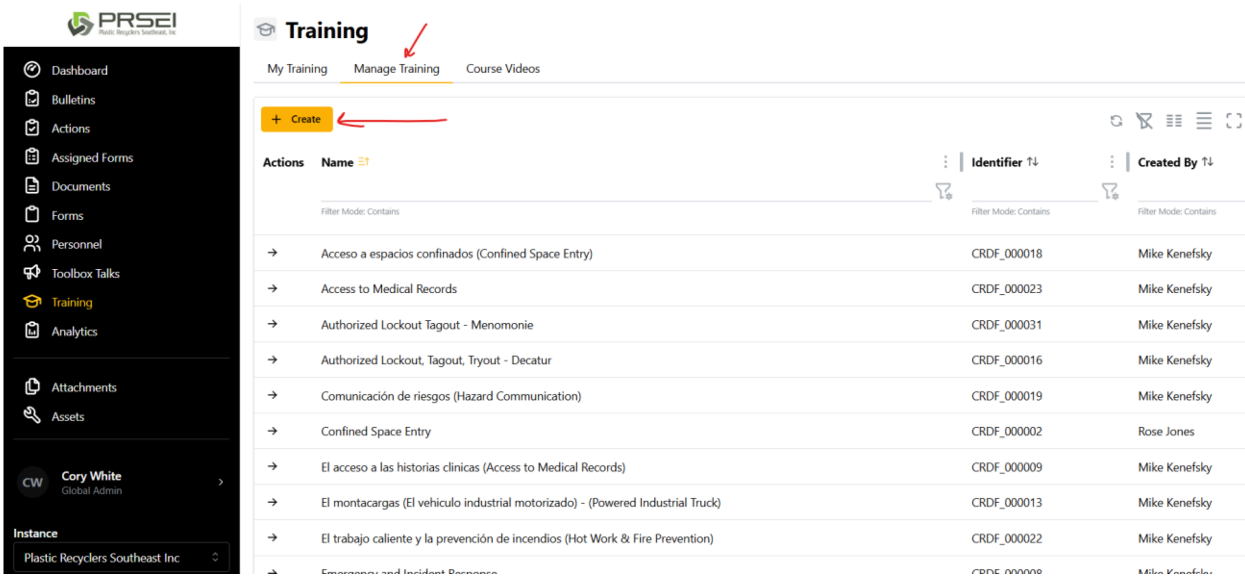
> ℹ **Tip:** Use the search and filter options at the top of the Manage Training list to quickly find a course by name, status, or office.

Creating a Training Course

Use this workflow to build a new training course. Each course has a unique CRDF_XXXXXX code and contains settings, content (lessons/quizzes/demonstrations), and employee assignments — all managed through the Edit form.

1. Click Training in the left sidebar.

2. Click the yellow + Create button in the top-right corner.



3. The Edit form opens. Fill in the General Settings:
   - Name * — a clear title employees will see (e.g., 'Forklift Safety Certification 2026').
   - Office — assign to a specific office, or leave blank to make it available instance-wide.
   - Default Language * — the language content will be shown in by default.
   - Active — toggle on to make the course visible and assignable to employees.
4. Under Course Assignments, click Choose selections to assign the course to specific employees, groups by manager, or groups by department. You can also do this after saving.
5. Set Completion Tracking: enter a number in Due in Days (e.g., 30 means employees have 30 days to complete it after assignment).
6. Scroll down to Contents to add your course material (see the next section for details).
7. Click Save. The course is now live and visible in the Training list.

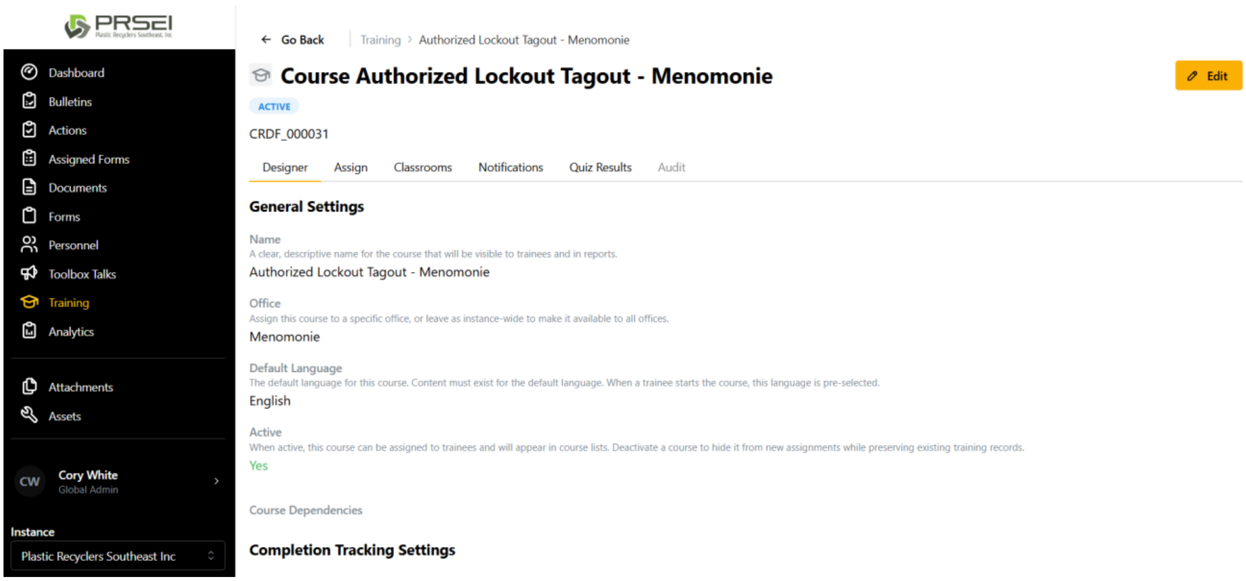
> 💡 **Note:** You can return to the course at any time and click Edit to add more content, adjust settings, or update assignments.

Adding Lessons, Quizzes, and Demonstrations to a Course

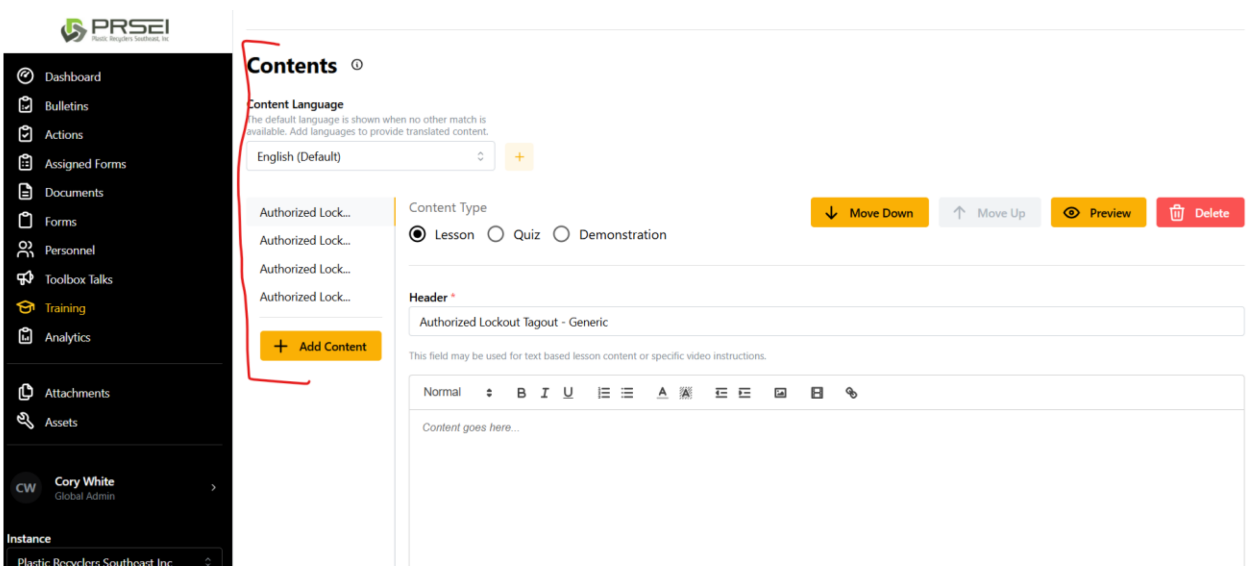
All course content — lessons, quizzes, and demonstrations — is added through the Contents section inside the course Edit form. Each piece of content is called a 'content item' and you choose its type when you create it.

> ⚠ **Important:** Do not look for separate Lessons, Quizzes, or Demonstrations tabs inside the course. All content is managed through the Contents section when you click Edit on the course.

1. Click Training in the left sidebar and find your course in the list.
2. Click on the course name to open it. You will see the course tabs at the top: Designer, Assign, Classrooms, Notifications, Quiz Results, and Audit.



3. Click the Edit button (yellow, top right) to open the course edit form.
4. Scroll down past the General Settings until you reach the Contents section.



5. Click the + Add Content button (yellow button on the left side of the Contents section).
6. A form panel opens on the right. Set the Content Type by clicking the radio button for the type you want to add:
   - Lesson — a video, reading, or PDF that employees must complete. Select a Video Provider (Internal, YouTube, or Vimeo) and choose or link the video.
   - Quiz — a set of questions to test employee knowledge. After adding a Quiz content item, manage the questions in the Quiz Results tab.
   - Demonstration — a hands-on task an employee must perform in person. A certifying trainer verifies completion.

7. Fill in the Header (required) — this is the title employees will see for this content item.
8. For a Lesson, also fill in the Time Limit (Minutes) and select the Video Provider and Video from your library.
9. Click Save at the bottom of the page. The new content item appears in the left panel list.
10. Repeat steps 5–8 for each lesson, quiz, or demonstration you want to add to the course.

> ℹ **Tip:** Content items appear to employees in the order they are listed. Use the Move Up and Move Down buttons to reorder them, and the Preview button to see how a lesson will look to the employee.

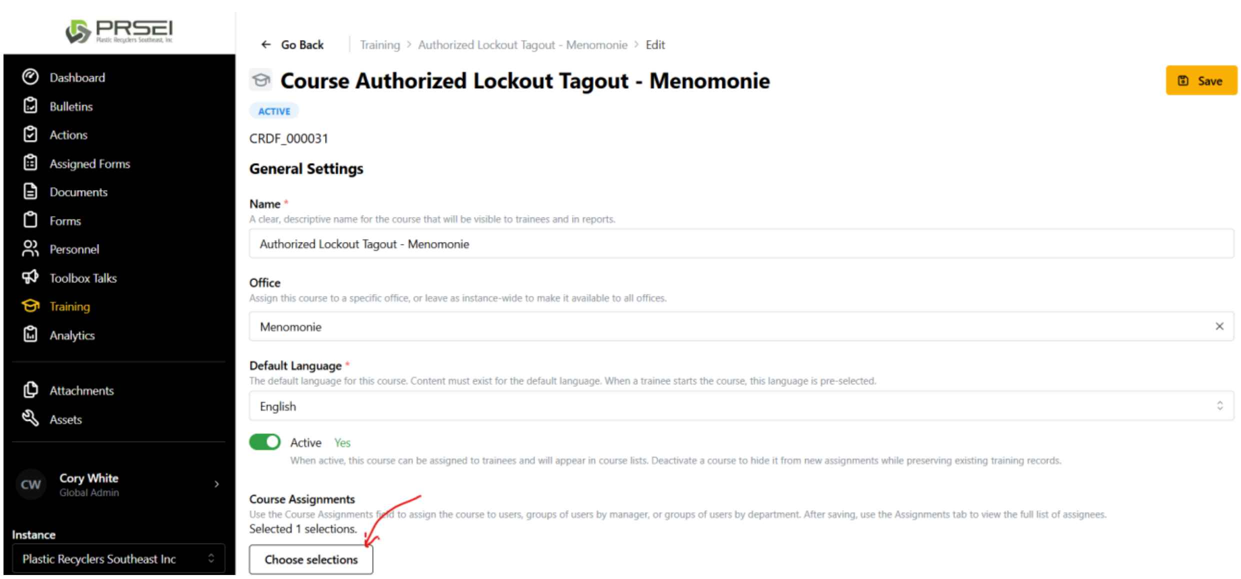
> 💡 **Note:** Before employees can be assigned to a course, the course must have Active set to Yes. Turn this on in the General Settings at the top of the Edit form.

Assigning Employees to a Training Course

Employees are assigned to a course through the Course Assignments field inside the course Edit form. You can assign individual employees, all employees in a department, or groups of employees by manager.

> ⚠ **Important:** There is no separate 'Assign Employees' button on the course page. To assign or remove employees, you must click Edit on the course and use the Course Assignments field.

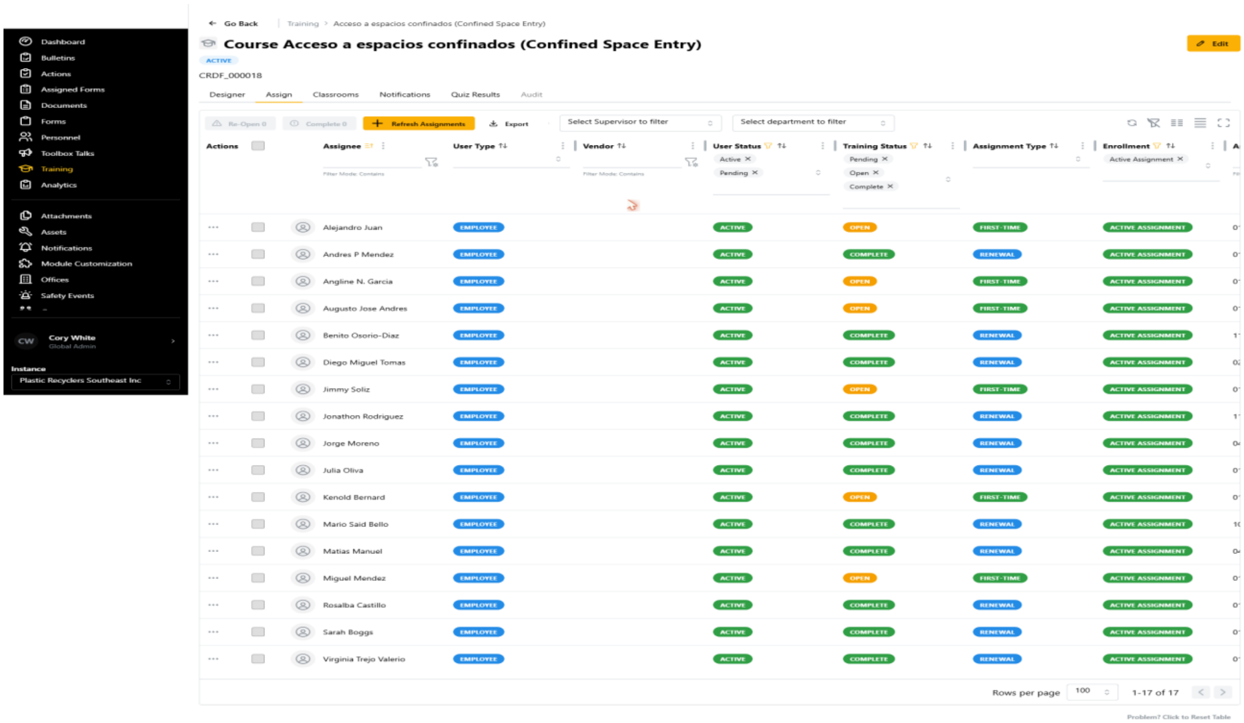
1. Click Training in the left sidebar and find your course in the list.
2. Click on the course name to open it, then click the Edit button (yellow, top right).
3. In the Edit form, scroll down to the Course Assignments field — it is just below the Active toggle in the General Settings area.



4. Click Choose selections.
5. A selection panel opens. You can search and choose:
   - Individual employees by name.
   - Groups of employees by their manager (all direct reports of a supervisor).

- Groups of employees by their department.
- Groups of employees by the “Group” assigned to them in the “Group” module.

6. Select all the employees or groups you want to assign and confirm your selections.
7. Click Save at the bottom of the page.
8. To verify the assignments, click the Assign tab at the top of the course page. You will see every assigned employee with their Training Status (Open, Complete, Pending).



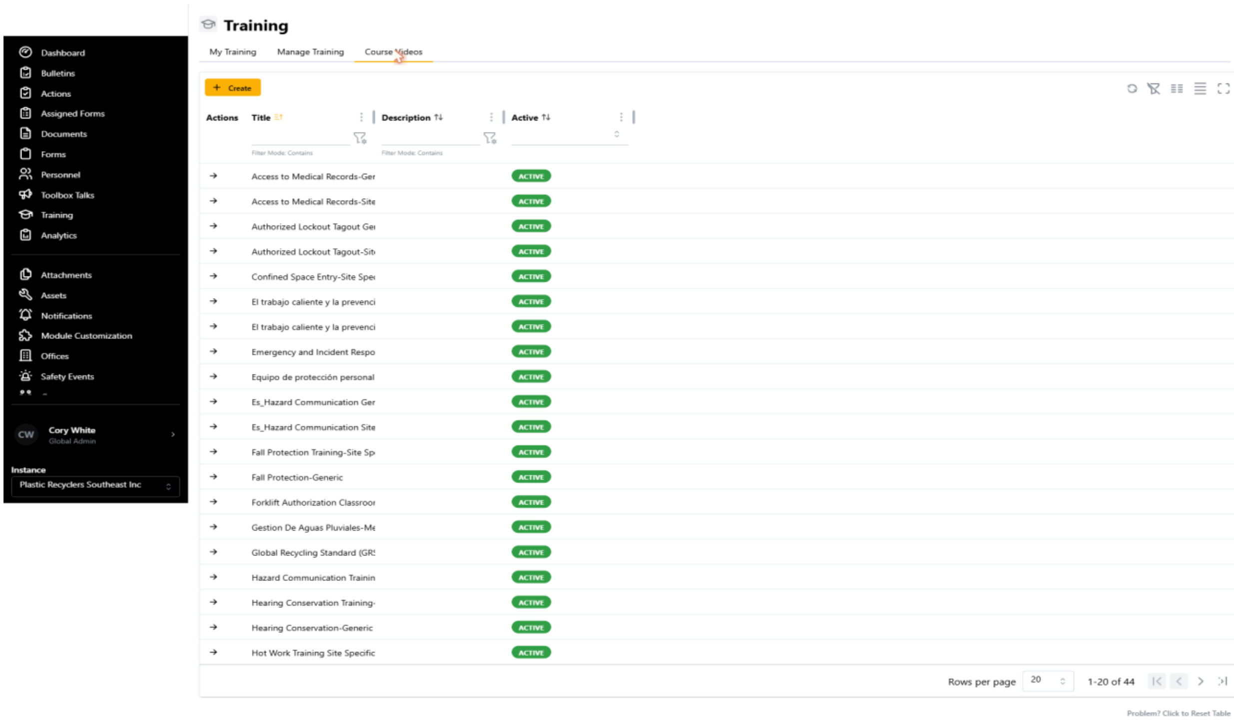
💡 **Note:** Once assigned, each employee will see the course in their Training module under My Training with an OPEN status. They will receive a notification email if email alerts are configured for your instance.

ℹ **Tip:** To check who is assigned without making changes, use the Assign tab view — you can filter by supervisor, department, or training status.

Adding a Video to the LMS (Course Videos)

The Course Videos tab is the Learning Management System (LMS). Use it to upload video content that employees can watch as part of their training.

1. Click Training in the left sidebar.
2. Click the Course Videos tab.



3. Click the yellow + Create Course Video button.
4. Fill in the required fields:
    - Title * — the name of the video.
    - Video File * — click to browse and upload your video file (maximum 300 MB).
5. Optionally add a Description to explain what the video covers.
6. Click Save. The video will appear in the Course Videos library.

> ℹ **Tip:** Course videos uploaded here can be linked to lessons inside a training course. After uploading, go to the course, open a Lesson, and select the video from the library.

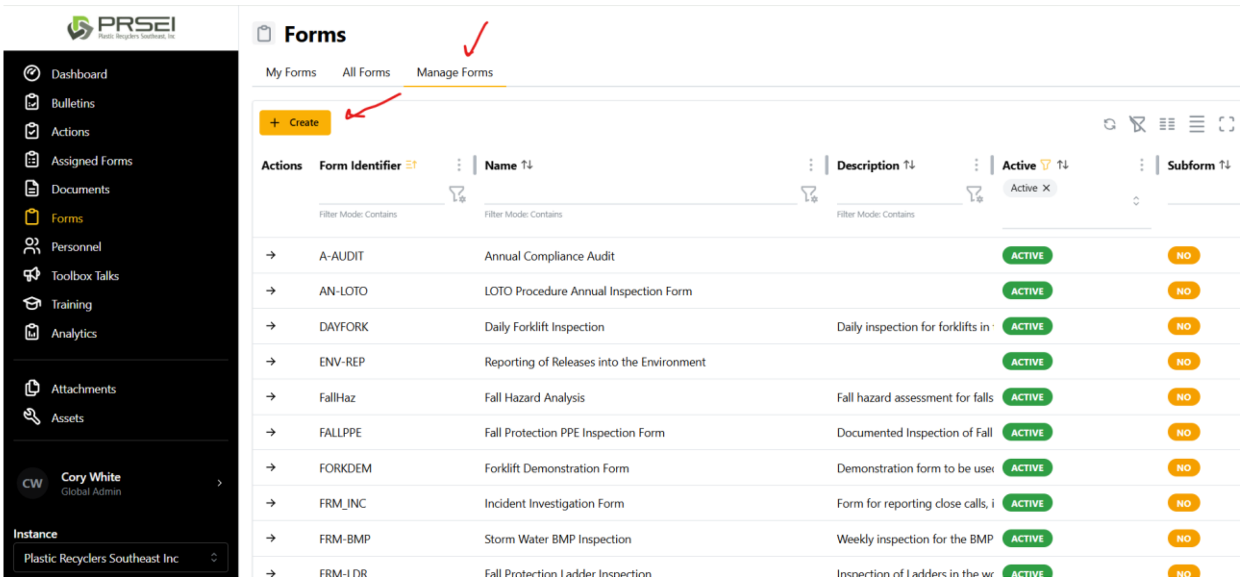
Forms — Building and Assigning Forms

The Forms module (also called Form Builder) is where you create custom forms for your organization — things like incident reports, safety inspections, audits, and checklists. You can also embed forms inside other forms and assign forms directly to employees.

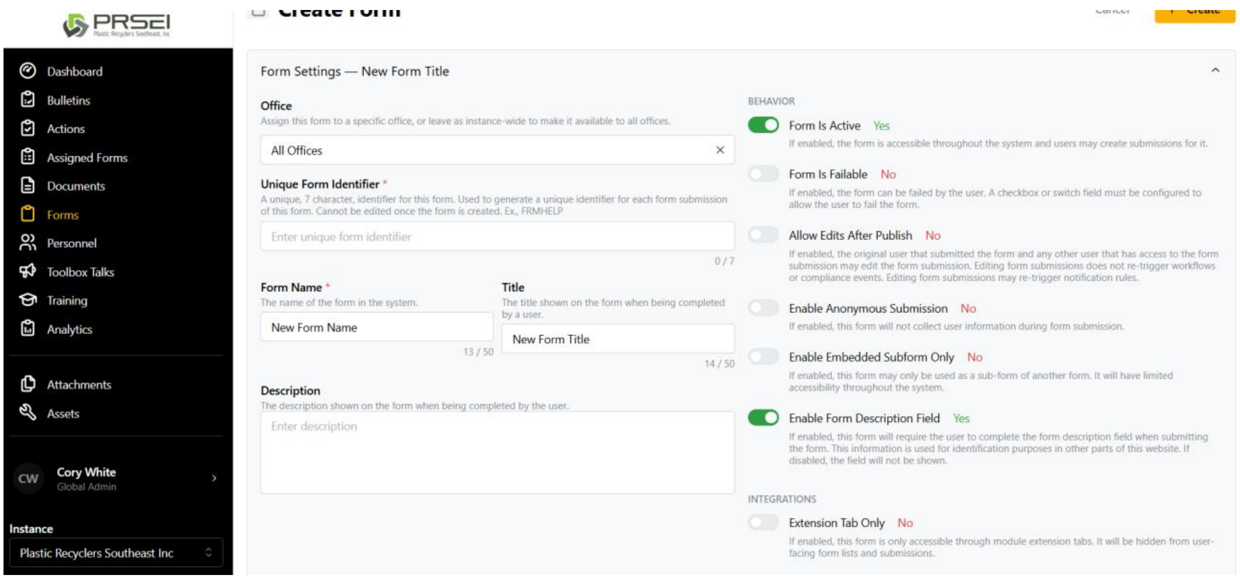
Creating a Form in Form Builder

Use this workflow to build a new form from scratch.

1. Click Forms in the left sidebar.
2. On the Manage Forms tab, click the yellow + Create Form button.

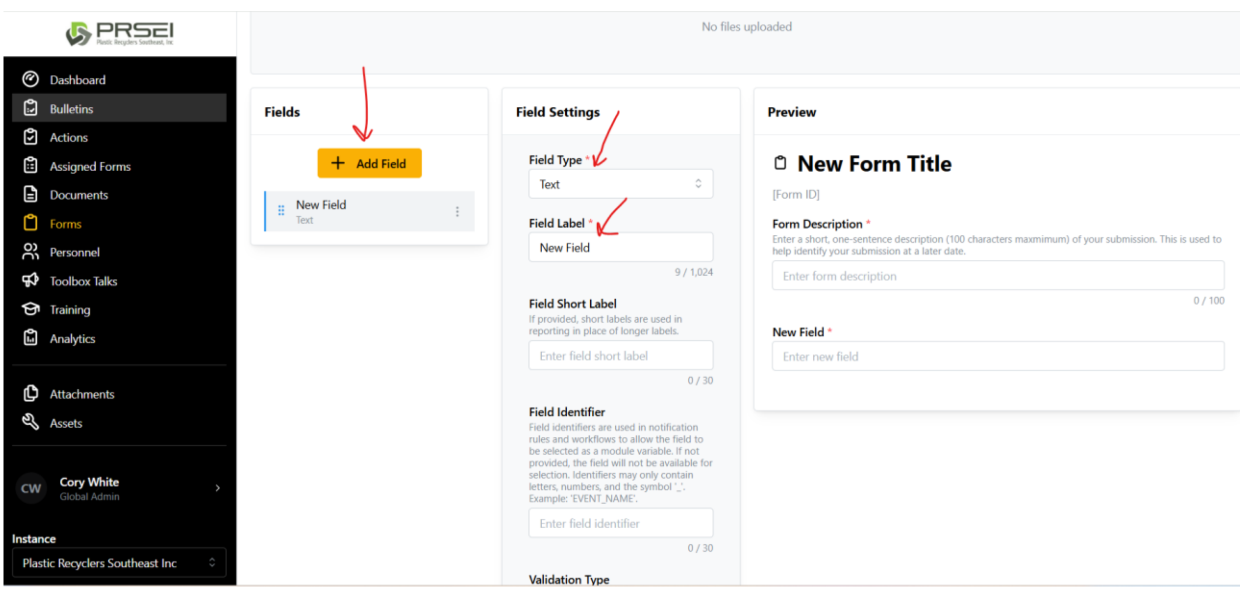


3. Fill in the form setup fields:
   - Office — select which office this form applies to (leave blank for all offices).
   - Unique Form ID * — enter exactly 7 characters (no spaces). This ID is used in reports and tracking (e.g., FRMSAFE, FRMINCD, FRMAUDT).
   - Form Name * — the internal name admins see.
   - Title — the name employees see when they open the form.
   - Description — explains the purpose of the form to employees.



> 💡 **Note:** The Unique Form ID must be exactly 7 characters. If the ID you want is already taken, try an abbreviation of the job title or department (e.g., FRMOPS1, FRMHR01). Job Title is not a required field — it is optional.

4. Configure the Behavior toggles as needed (e.g., allow multiple submissions, require supervisor approval).
5. Under Integrations, enable any applicable options such as automatically create a Safety Event from a form submission.
6. In the builder, add sections and fields using the + Add Field or Add Section buttons. Available field types include text, dropdown, date, checkbox, signature, sub-form, and more.

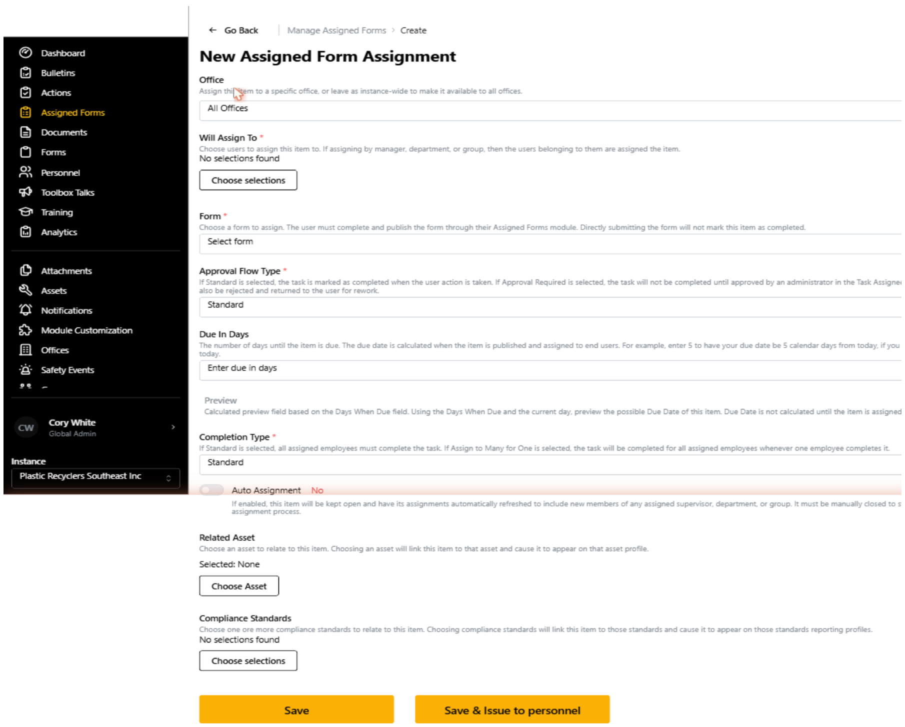


7. Click Publish when the form is ready for employees to use.

Assigning a Form to an Employee

After creating and publishing a form, you can assign it to specific employees or groups. Assigned forms appear in the employee's Assigned Forms module for them to complete.

1. Click Forms in the left sidebar.
2. On the Manage Forms list, find the form you want to assign. Click the arrow (→) next to it to open the form details.
3. Look for the Assign or Assign Form button (usually in the top-right area of the form detail page).



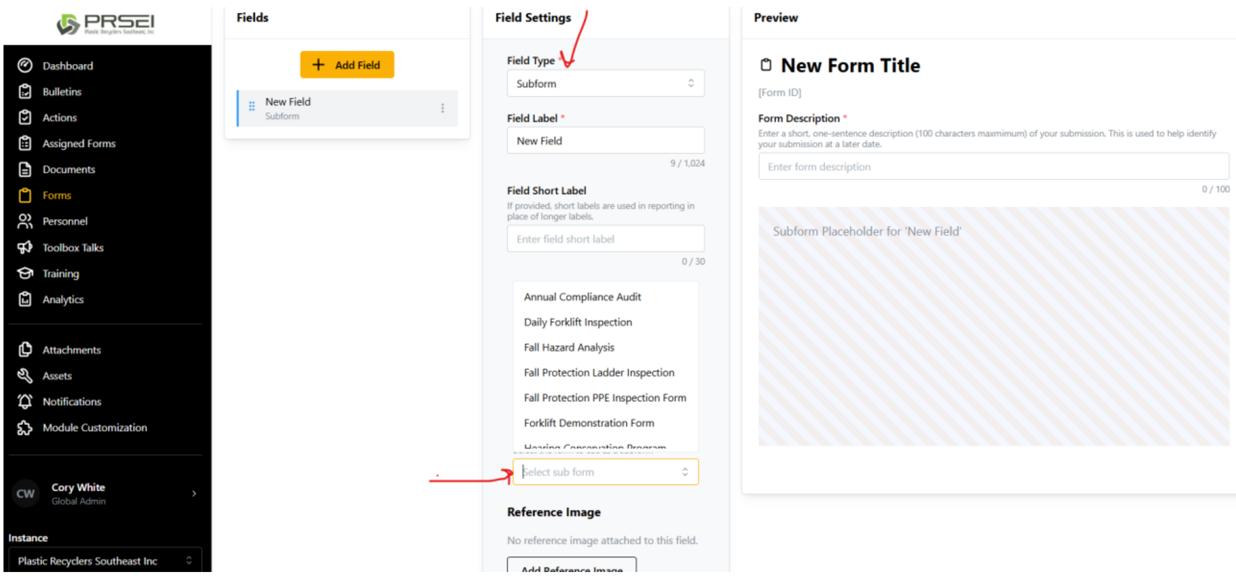
4. In the assignment panel, fill in:
   - Assign To (Employee) — search for and select the employee who should receive this form.
     — OR — Assign To (Group) — if assigning to a whole group, select the group instead.
   - Due Date — when the form must be submitted.
   - Approval Flow — choose Standard (submit and done) or Approval Required (supervisor reviews submission).
5. Toggle Notify employee by email to ON so the employee gets an email alert.
6. Click Assign Form. The form will appear in the employee's Assigned Forms module with OPEN status.

> ℹ **Tip:** You can also assign forms to employees in bulk by selecting multiple employees from the Groups module.

Embedding a Sub-Form into a Form

ProactEHS allows you to embed an existing form as a section inside another form. This is useful for reusable components like employee signature blocks or standard checklists.

1. Click Forms in the left sidebar.
2. Click the arrow (→) next to the form you want to add a sub-form to.
3. In the Form Builder canvas, navigate to the section where you want to embed the sub-form.
4. Click + Add Field, then choose Sub-Form or Embedded Form from the field type list.
5. In the field configuration panel, select the form you want to embed from the Form Definition dropdown.

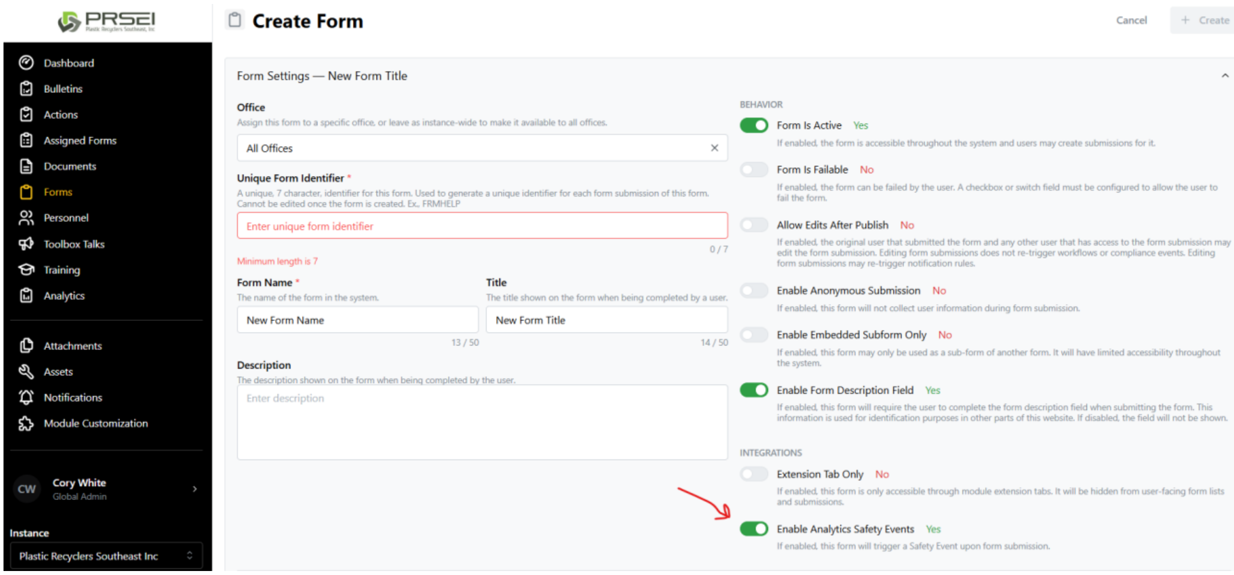


6. Click Save to apply the change.

Linking a Form to Safety Events (Auto-Create on Submit)

You can configure a form so that when an employee submits it, a Safety Event record is automatically created in ProactEHS. This is ideal for incident investigation forms — when someone submits the form, the system creates the Safety Event without any extra steps.

1. Click Forms in the left sidebar. Find your form and click the arrow (→) to open it.
2. In the form settings, click the Integrations tab.



3. Find the Safety Events Integration option. Toggle it to ON.
4. Once enabled, map the form fields to the Safety Event fields (e.g., 'Incident Description' field → Safety Event Description).
5. Click Save Settings.
6. From now on, every time an employee submits this form, a linked Safety Event will be automatically created. Typically this is for an incident investigation, property damage, or vehicle incident form

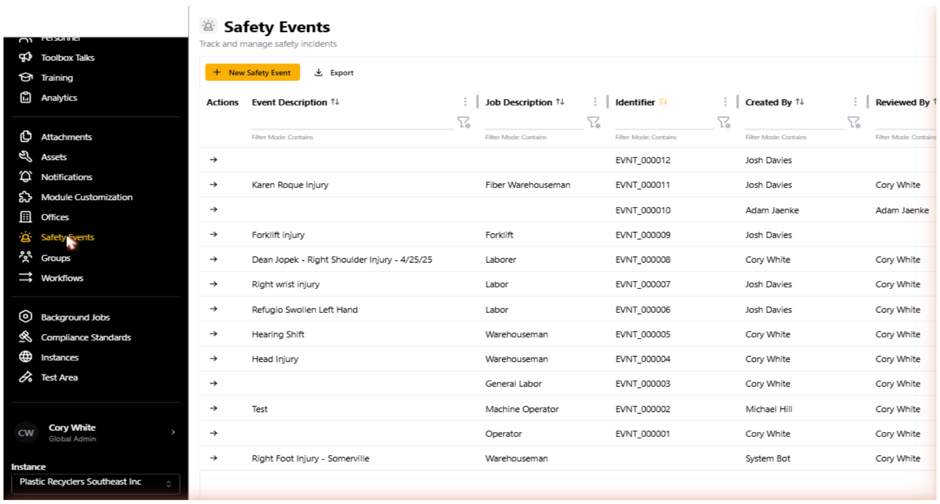
> 💡 **Note:** The Safety Event created will be linked to the form submission, so you can navigate between them easily. The Safety Event will appear in the Safety Events module with the form submission details pre-filled.

Safety Events — Recording Incidents

The Safety Events module is where you record workplace incidents, near-misses, injuries, and OSHA-recordable events. Each Safety Event gets a unique ID in the format EVNT_XXXXXX. Note: This module may not be available in all ProactEHS instances — contact your administrator if you don't see it.

Creating a Safety Event

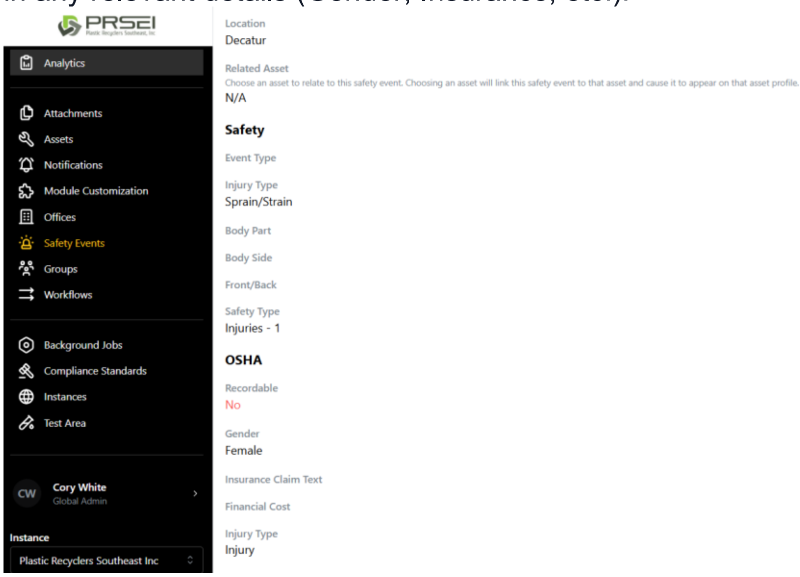
1. Click Safety Events in the left sidebar.
2. Click the yellow + New Safety Event button.



3. Complete the required fields in the form header:
   - Form Description * — a brief summary of what happened (max 100 characters).
   - Incident At * — select the location where the incident occurred.
   - Time Period *, Time *, Shift * — when the incident occurred.
   - Job Description * — describe what task was being performed (max 500 characters).
   - User Type *, Event Person *, Location * — who was involved and where.

4. In the Safety section, fill in: Event Type, Injury Type, Body Part, Body Side, and Safety Type.

5. In the OSHA section, toggle Recordable if this event qualifies as OSHA-recordable, and fill in any relevant details (Gender, Insurance, etc.).

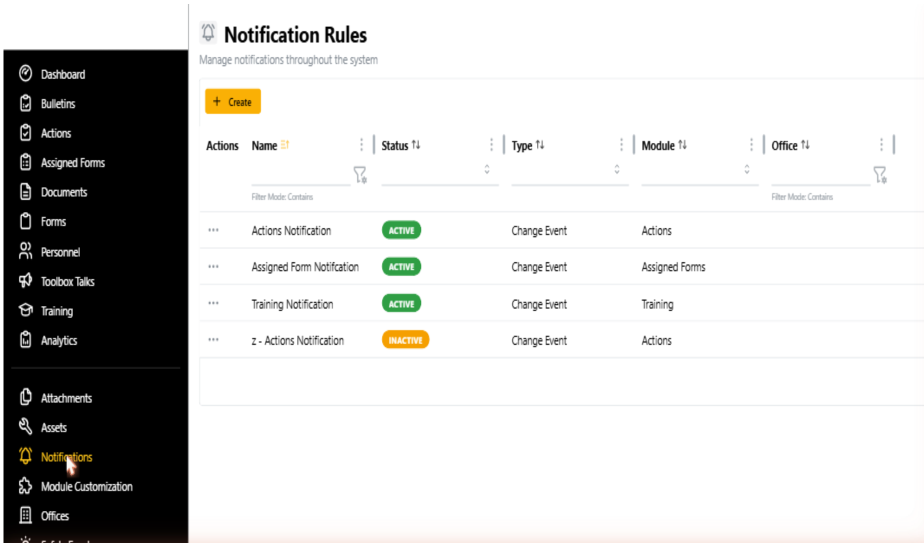


6. Click Save as Draft to save without finalizing, or Publish to make the event official. Published events show a PUBLISHED badge. If you want to be able to continue to update the incident, keep it in Draft mode.

ℹ **Tip:** If your organization uses a Form Builder incident investigation form linked to Safety Events, a Safety Event may be automatically created when the form is submitted. See the 'Linking a Form to Safety Events' section under Forms for details.

Notifications — Setting Up Automated Alerts

Notification rules automatically send email alerts to employees when specific things happen in ProactEHS — such as when an action goes overdue, a training is due soon, or a form is submitted. There are two types of notifications: Change Events (triggered by something changing) and Reminders (triggered by a schedule).

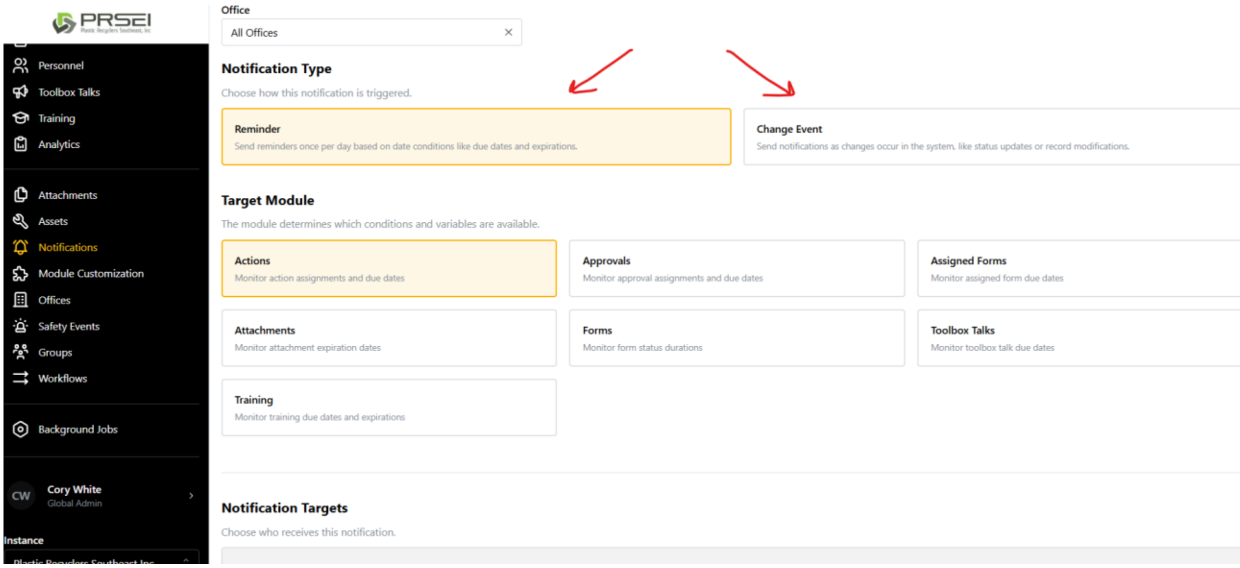


Creating a Notification Rule

1. Click Notifications in the left sidebar.
2. Click the yellow + Create Notification Rule button.
3. Give the rule a Name * — use a descriptive name so you can identify it later (e.g., 'Overdue Action Alert — All Users').

Choosing the Notification Type

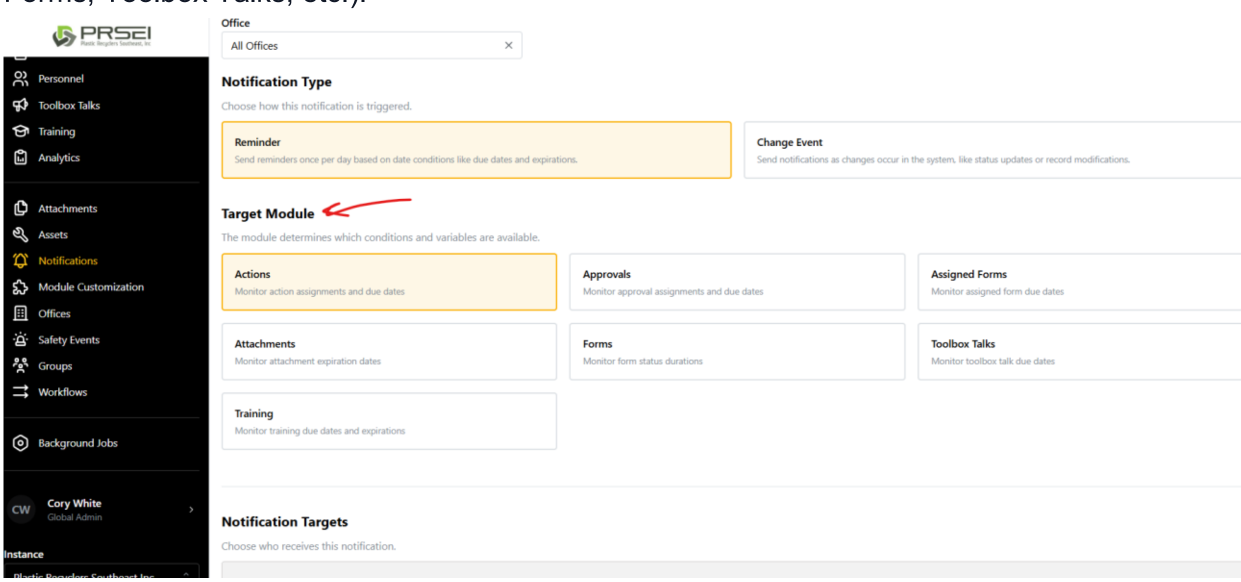
The Type field determines WHEN the notification fires. Choose carefully:



- Change Event — fires when something CHANGES in the system. Examples: an action becomes overdue, a form status changes, an employee's record is updated. After selecting Change Event, you will see a 'Change Event Type' dropdown — select what kind of change triggers this rule (e.g., Overdue, Status Changed, New Assignment).
- Reminder — fires on a SCHEDULE relative to a date. Examples: send a reminder 3 days before a training is due, or 1 day after an action is overdue. After selecting Reminder, you will see fields for how many days before/after the due date to send the alert.

> **Note:** Change Event = reacts to something happening. Reminder = sends alerts based on upcoming or past dates. When in doubt: if you want to warn employees BEFORE a deadline, use Reminder. If you want to notify when something is already late or changed, use Change Event.

4. Select the Target Module — which module this rule watches (Actions, Training, Assigned Forms, Toolbox Talks, etc.).



5. Select Notify Who — who should receive the alert (Assigned User, Supervisor, Group, or specific person).
6. Optionally select an Office to limit this rule to a specific location.
7. Toggle Active to ON to enable the rule.
8. Click Save.

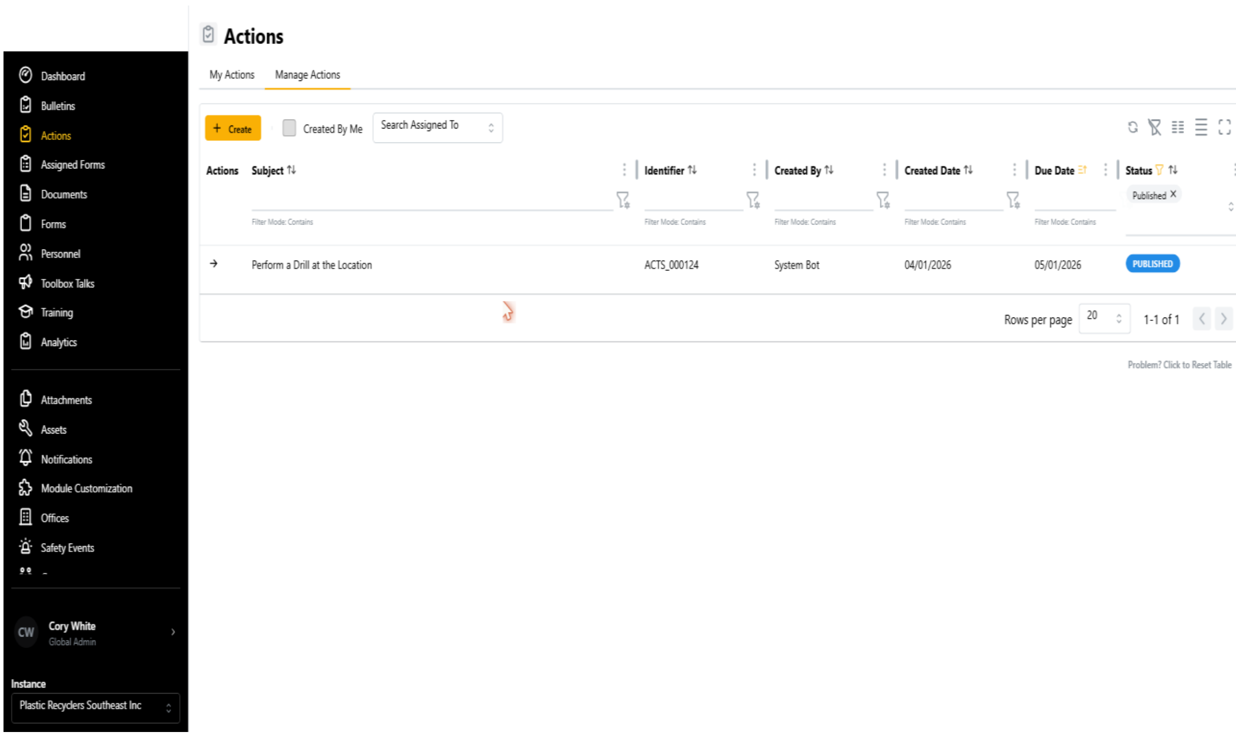
> ℹ **Tip:** You can create multiple notification rules for the same module. For example, set a Reminder 7 days before training is due AND a Change Event for when training becomes overdue.

Actions — Creating and Managing Tasks

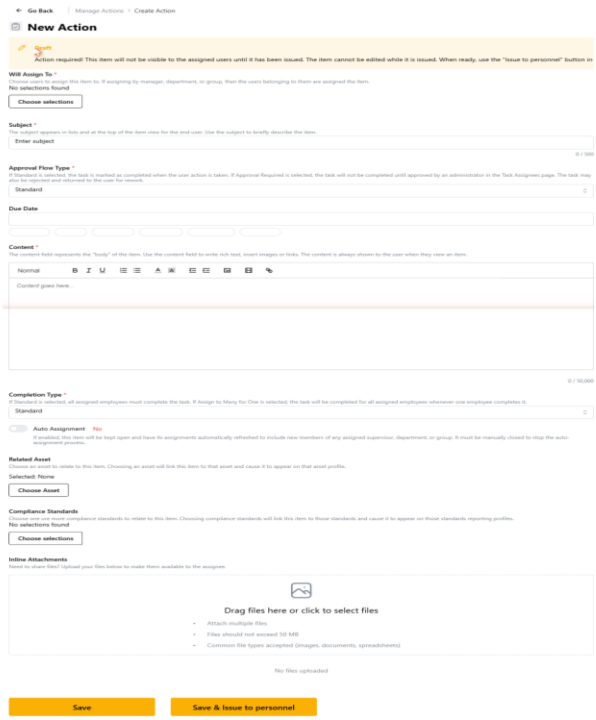
Actions are tasks or corrective items you can assign to employees. Think of them as work orders or to-do items that employees must complete and acknowledge (or get approved).

Creating an Action

1. Click Actions in the left sidebar.
2. On the Manage Actions page, click the yellow + Create Action button.



3. Fill in the required fields:
   - Will Assign To * — select the employee or group who should receive this action.
   - Subject * — a clear description of what needs to be done (up to 500 characters).
   - Approval Flow Type * — choose Standard (action is complete when the employee acknowledges it) or Approval Required (a supervisor must approve before it counts as complete).



4. Optionally set a Due Date and add detailed instructions in the Content editor.
5. Click Save. The action will be assigned immediately and the employee will see it in their Actions list.

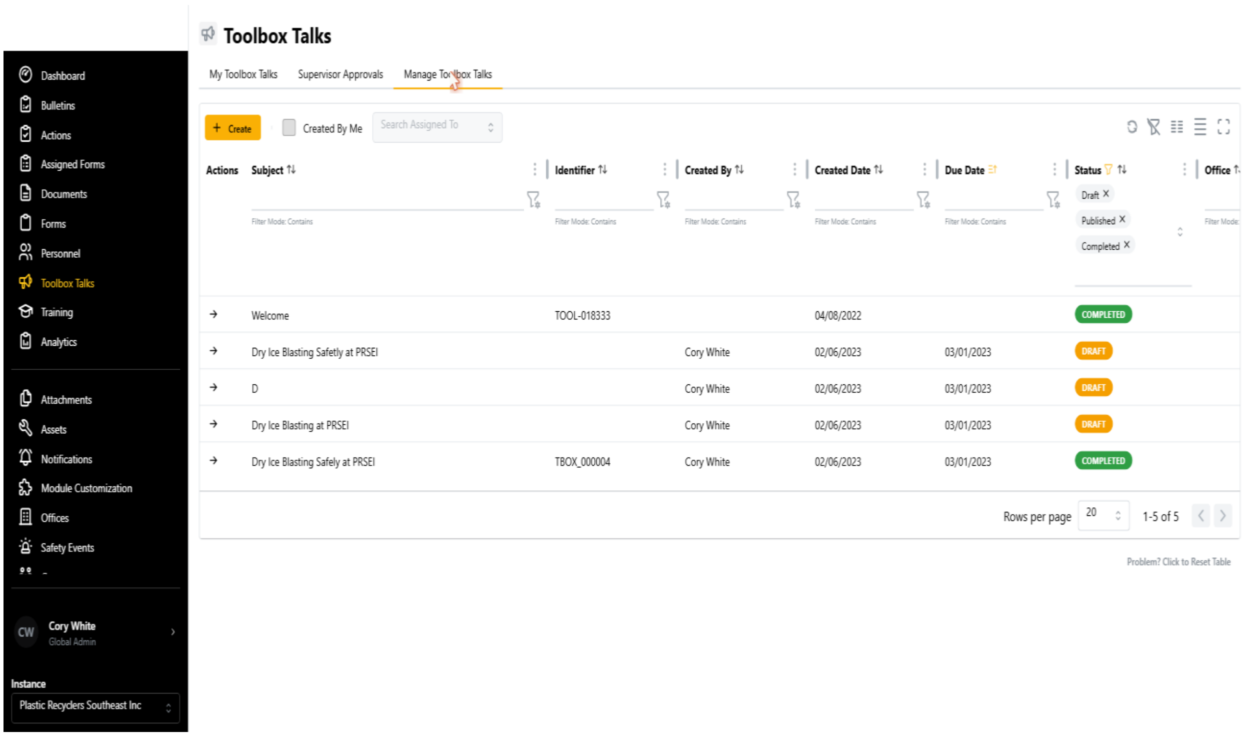
> **Note:** The employee will receive an email notification when an action is assigned to them if email notifications are enabled for your instance.

Toolbox Talks — Safety Briefings

Toolbox Talks are short safety briefings assigned to employees. They can include rich text content and require employees to acknowledge that they have read and understood the material.

Creating a Toolbox Talk

1. Click Toolbox Talks in the left sidebar.
2. Click the yellow + Create button.



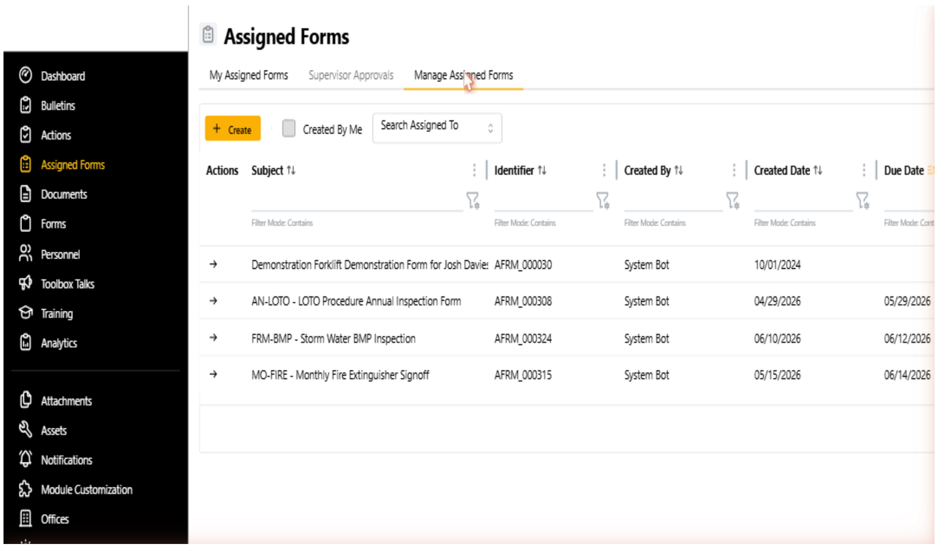
3. Fill in the required fields:
   - Will Assign To * — select the employee(s) or group(s) to receive this talk.
   - Subject * — the title of the toolbox talk.
   - Approval Flow Type * — Standard (employee acknowledges and it's done) or Approval Required.
   - Set Due In Days — the number of days employees have to complete the talk (e.g., 7).
   - Content – Put text, a picture, or video here (many people will create something in Canva or Adobe and download it as a picture and then upload it into the content section).
4. Optionally select an Office and add the briefing content in the rich text editor.
5. Click Save. The toolbox talk will be assigned and appear in the assignee's open items.

Assigned Forms — Monitoring Form Submissions

The Assigned Forms module is your admin view of all form submissions across the organization. You can see what has been submitted, what is still open, and approve pending submissions.

Viewing All Form Submissions (Admin View)

1. Click Assigned Forms in the left sidebar.
2. The page has three tabs — click the one you need:
   - My Assigned Forms — forms assigned directly to you (your own tasks).
   - Supervisor Approvals — forms submitted by your direct reports that are waiting for your approval.
   - Manage Assigned Forms — the full admin view of ALL form submissions across all users.

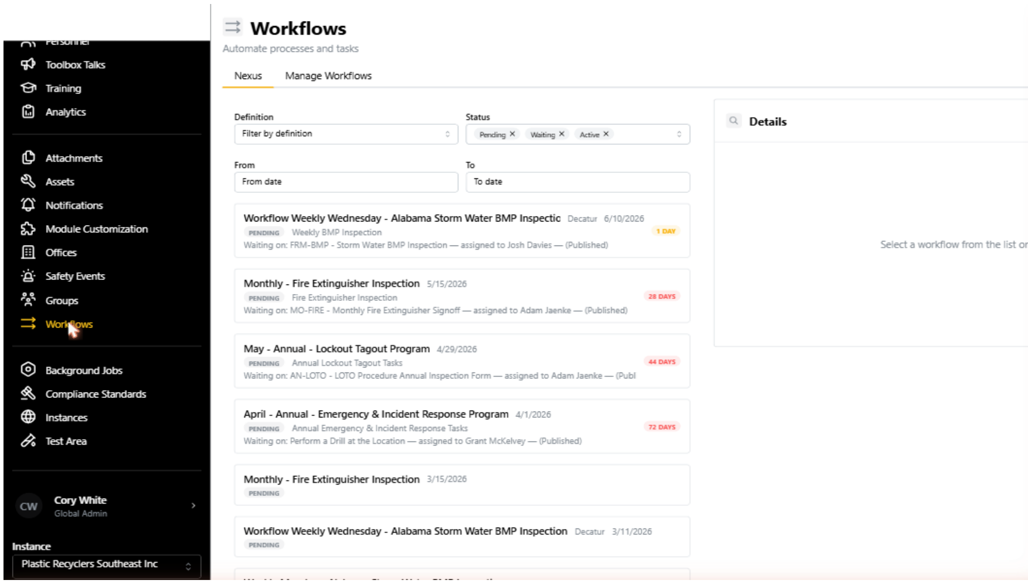


3. Click the Manage Assigned Forms tab to see the full organization-wide view.
4. Use the filter options (Office, Form Name, Status) to narrow down the results.
5. Click the arrow (→) next to any record to view the full form submission.

> ℹ **Tip:** The Manage Assigned Forms tab is the most important tab for admins. Use it to monitor compliance, check who hasn't submitted required forms, and review submissions.

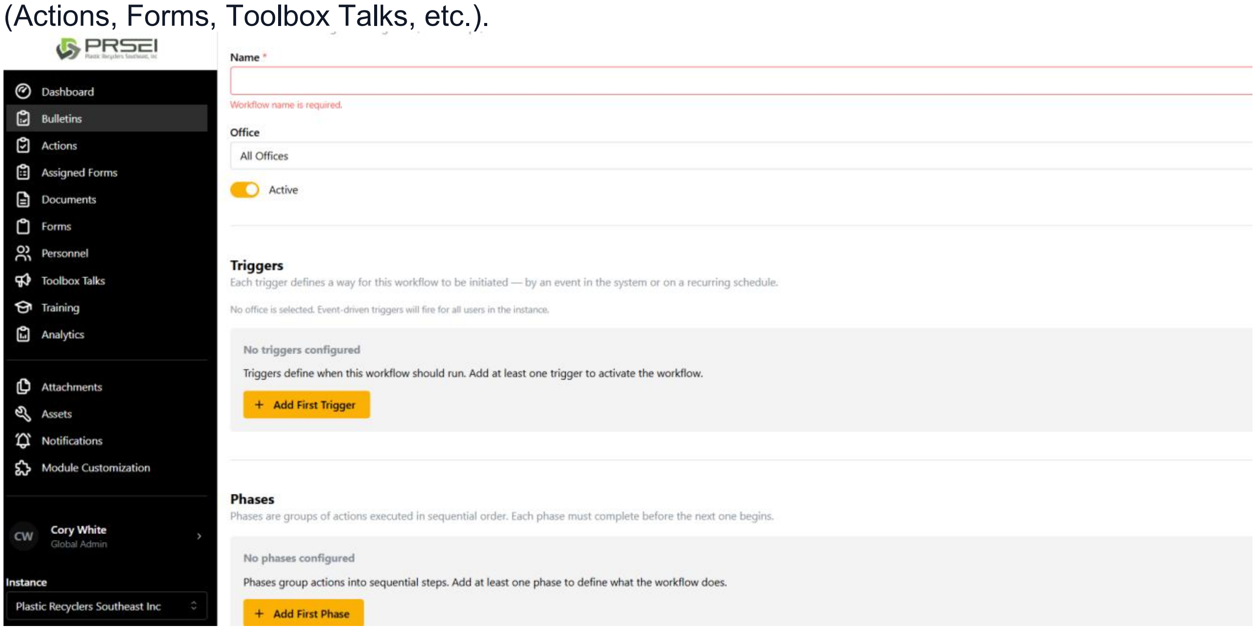
Workflows — Setting Up Automations

Workflows define multi-step approval processes.

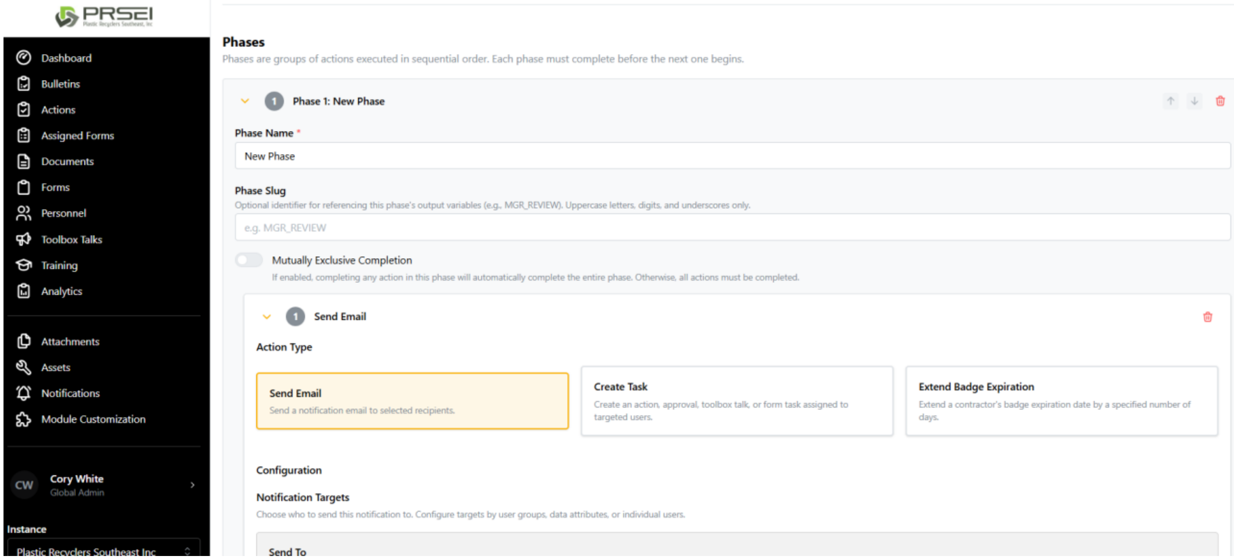


Creating a Workflow

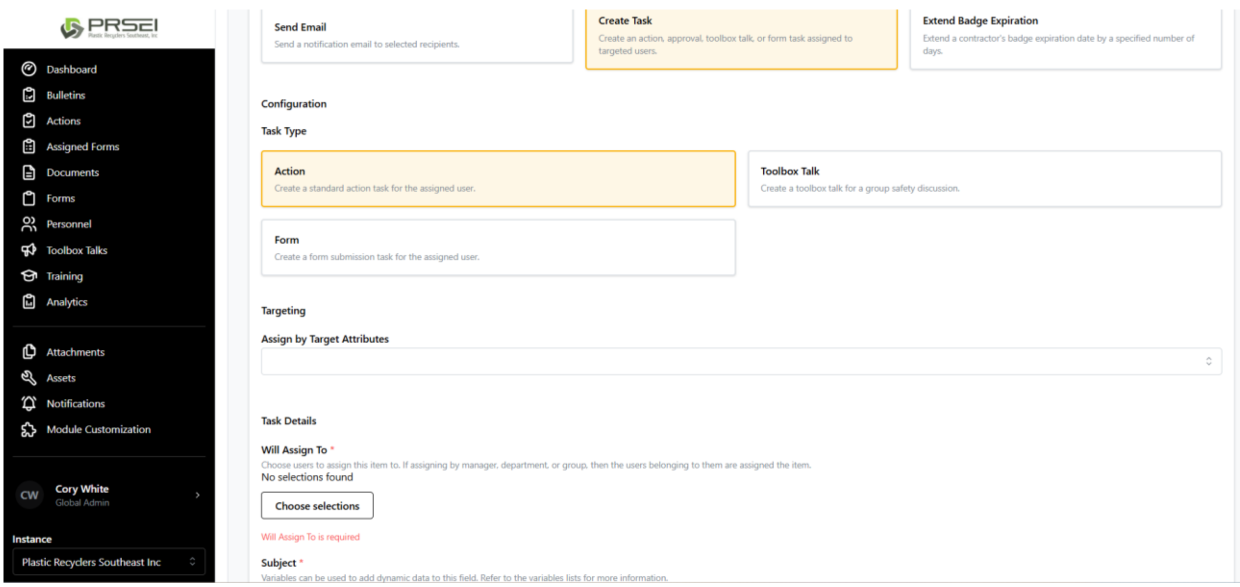
1. Click Workflows in the left sidebar.
2. The page shows all existing workflows with their status: DRAFT, ASSEMBLE, PUBLISHED, or COMPLETED.
3. Click + New Workflow to create a new workflow.
4. Enter a Workflow Name (e.g., 'Incident Approval — Two Step') and select the Type (Actions, Forms, Toolbox Talks, etc.).



5. Click + Add First Trigger to add the first approval step. This could be on a scheduled frequency, form submission, task completion or specific to training. Based on that trigger, the Phase listed below will happen.
6. Click + Add Phase and then give it a title. After that add Actions you want to happen when that phase is triggered.



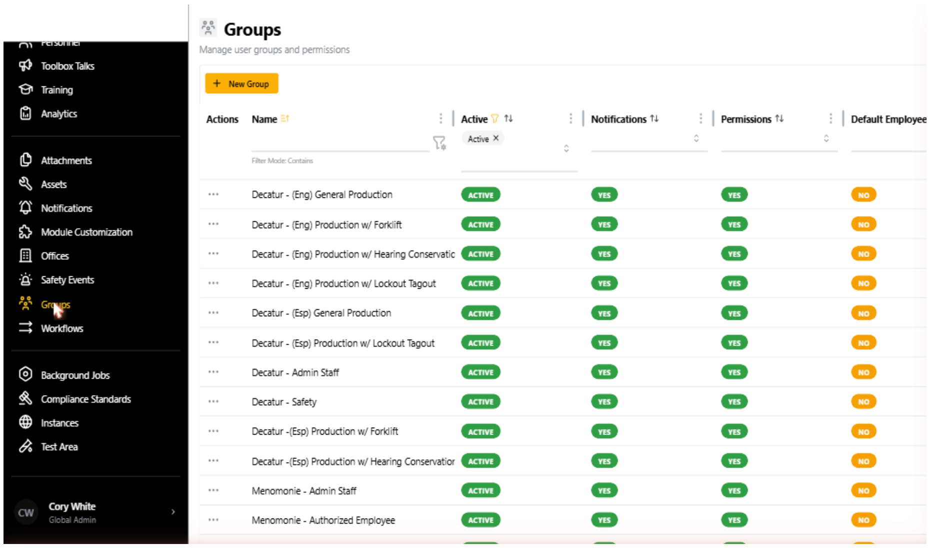
7. This can be an email, task creation or used to extend a badge expiration.
8. If you choose "Create Task" you can automatically assigned an Action, Toolbox Talk, or Form to an individual, group, manager group, or department.



9. Click Save when you have your workflow set up. The workflow status will change to PUBLISHED and it will be available to select when creating items.

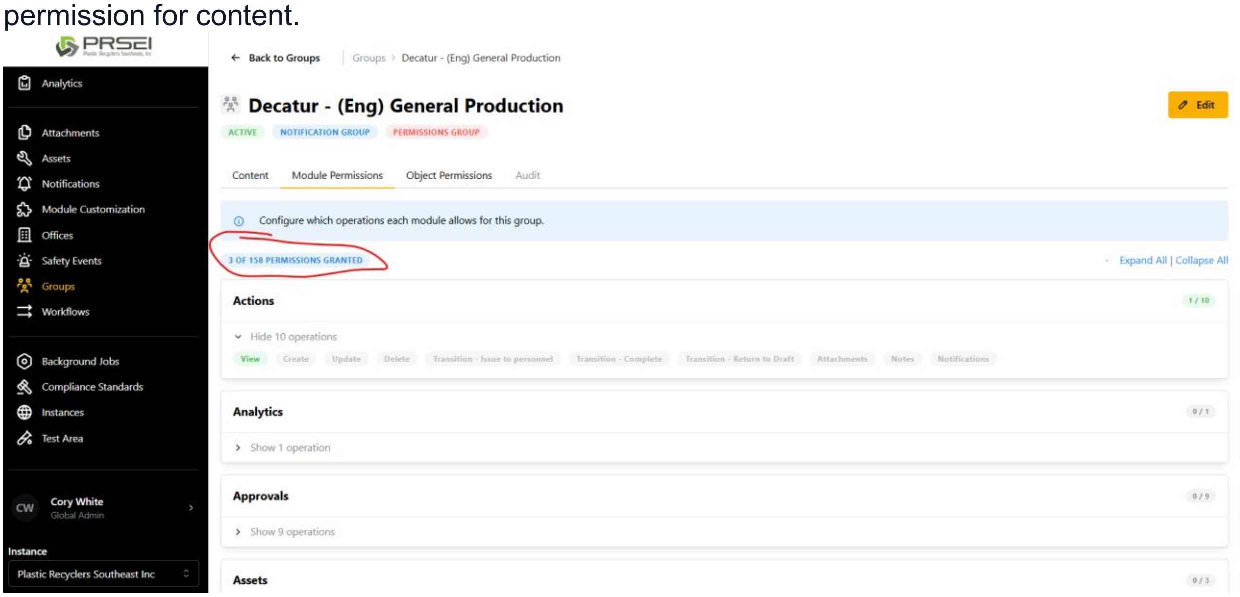
Groups — Managing Teams

Groups let you manage sets of users together. Instead of assigning training, actions, or notifications to individual employees one at a time, you can assign them to a group and everyone in the group receives it automatically.

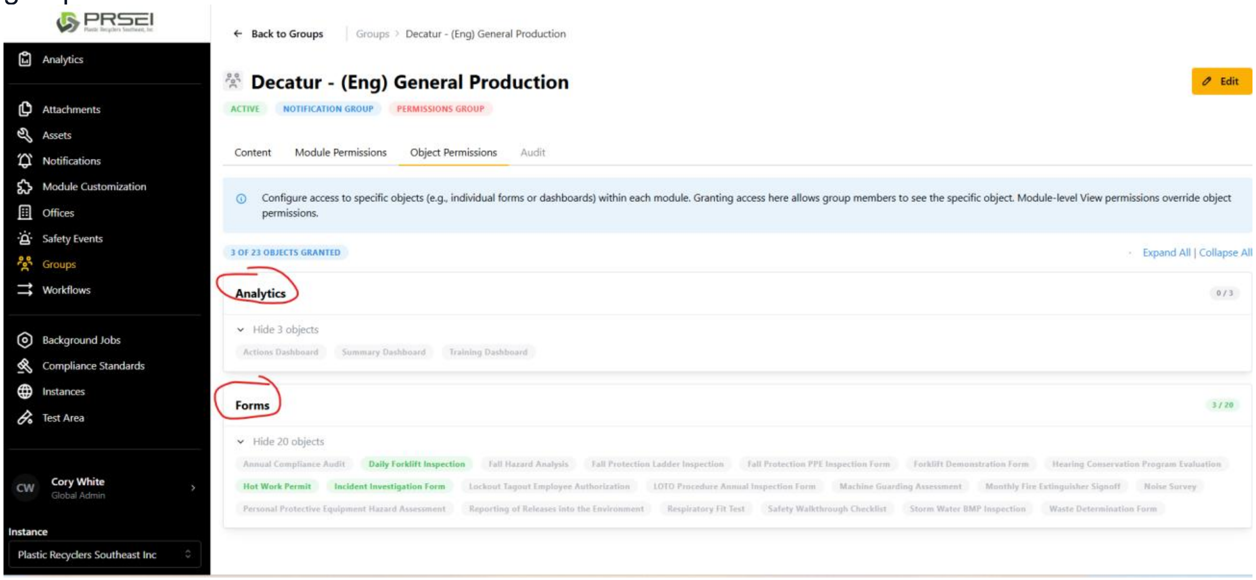


Creating a Group

1. Click Groups in the left sidebar.
2. Click + New Group.
3. Enter a Group Name (e.g., 'Warehouse Team') and an optional Description.
4. Use the Permissions tab to define what modules and actions group members can access. Note that all employees need to be assigned a group since this is how they get the proper permission for content.



5. Use the Object Permission tab to add permissions for analytics and forms that apply to all group members.



6. Use the Default Employees and Default Contractors tabs to automatically add new employees entered into the system a group.
7. Click Save.

> ℹ **Tip:** When you assign an action, training, or form to a group, every member of that group receives the assignment. This is much faster than assigning to people one at a time.

Item Tracker — Managing PPE and Equipment

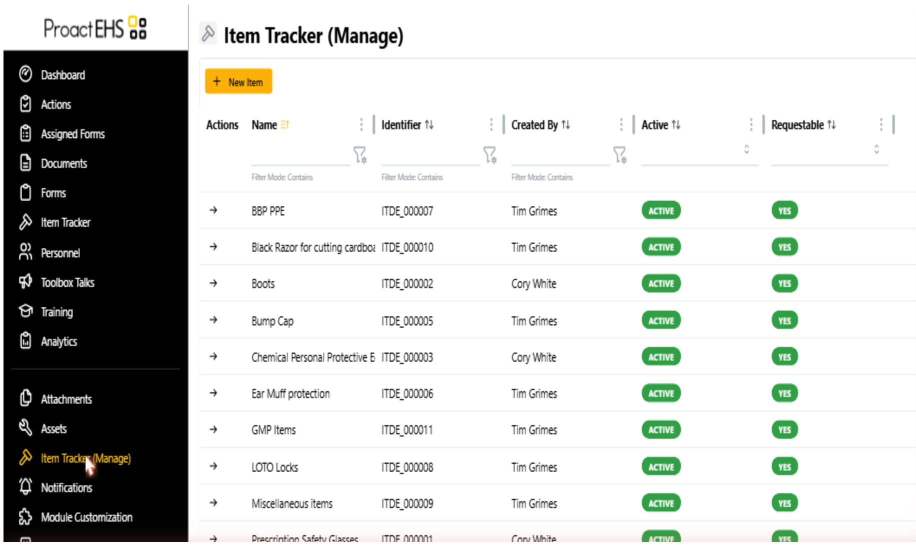
The Item Tracker module lets you define trackable items — such as PPE, tools, or equipment — and assign them to employees. Employees can see their assigned items and request new ones from their own Item Tracker dashboard. Note: Item Tracker is an instance-specific module and may not be enabled for all ProactEHS instances.

As an admin, your workflow has two parts: (1) setting up the item definitions in Item Tracker (Manage), and (2) assigning items to employees from their personnel profile.

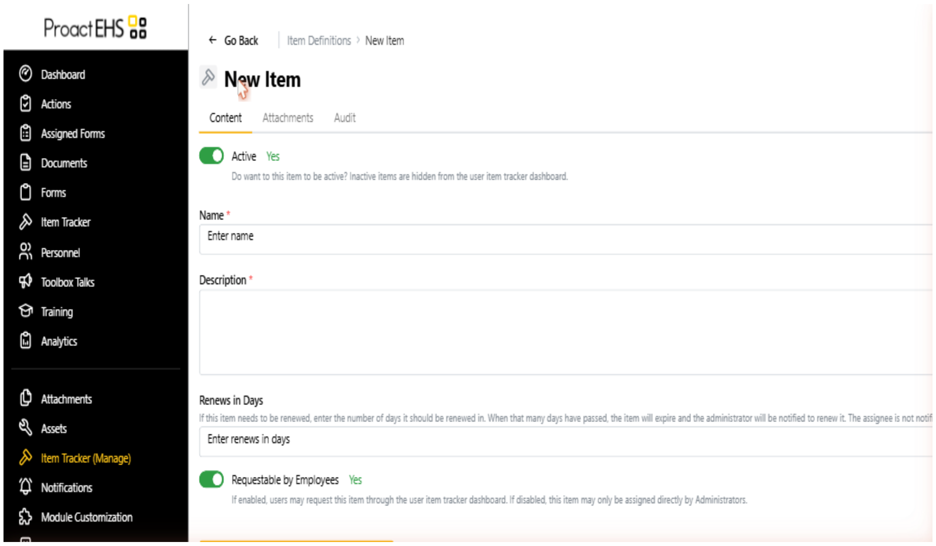
Setting Up Item Definitions (Item Tracker Manage)

Before you can assign items to employees, you need to create the item definitions. This is done in the Item Tracker (Manage) section, which is in the lower admin area of the sidebar.

1. Scroll down in the left sidebar to the admin section and click Item Tracker (Manage).



2. The Item Tracker (Manage) page shows all existing item definitions. Each item has a unique ITDE_XXXXXX identifier, an Active status, and a Requestable flag.
3. Click the yellow + New Item button to create a new item definition.



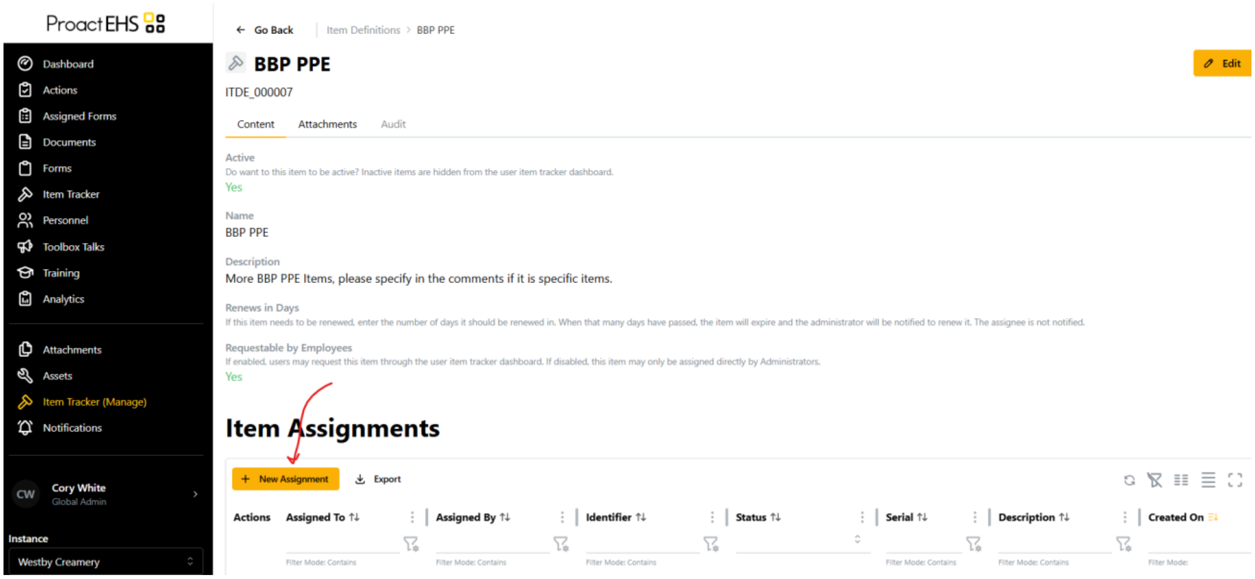
4. Fill in the item details:
   - Item Name * — a clear name for the item (e.g., 'Safety Glasses', 'LOTO Locks', 'Hi-Vis Vest').
   - Description — explain the item, including any specifications employees should note (e.g., 'ANSI Z87.1 rated safety glasses. Please provide color and size when requesting.').
   - Renews in Days — if this item needs to be periodically renewed or replaced, enter the number of days. When that many days pass after assignment, you (the admin) will be notified to renew it. Leave blank if the item does not expire.
   - Requestable by Employees — toggle ON if employees should be able to request this item themselves from their Item Tracker dashboard. Toggle OFF if only admins can assign it.
   - Active — toggle ON to make the item visible and available. Inactive items are hidden from all dashboards.
5. Click Save Item. The item will be added to the list with a new ITDE_XXXXXX identifier and is ready to assign.

> 💡 **Note:** Items with Requestable = Yes will appear in the employee's '+ Request Items' list on their Item Tracker page. Items with Requestable = No can only be assigned by admins directly.

Assigning an Item to an Employee

Once your item definitions are set up, you can assign items to individual employees from their personnel profile.

1. Click Personnel in the left sidebar.
2. Find the employee you want to assign an item to and click the arrow (→) next to their name.
3. On the employee's profile, click the Item Tracker tab.



4. The Item Tracker tab shows 'Item Assignments' — a list of all items currently assigned to this employee.
5. Click the yellow + New Assignment button.
6. In the assignment form:
   - Select the Item Definition from the dropdown (this shows all active items you've set up in Item Tracker Manage).
   - Enter a Serial Number if applicable (e.g., a unique ID on the physical item).
   - Set an Expiration Date or leave it to be calculated from the 'Renews in Days' setting.
7. Click Save. The item will appear in the employee's Item Assignments list with ACTIVE status. The employee will also see it in their Item Tracker dashboard under 'My Assigned Items'.

> ℹ **Tip:** You can also view all assignments for a specific item type by going to Item Tracker (Manage), clicking on the item, and scrolling down to the Item Assignments section.

Reviewing Employee Item Requests

When an employee requests an item through their Item Tracker dashboard, it will appear in your Item Tracker (Manage) list for review. You can approve or deny the request and assign the item.

1. Click Item Tracker (Manage) in the sidebar.
2. Check for pending requests — they will appear with a PENDING status.
3. Click the arrow (→) next to a pending request to review it.
4. If you approve it, click + New Assignment on the employee's profile to formally assign the item. If you deny it, you can delete or reject the request.

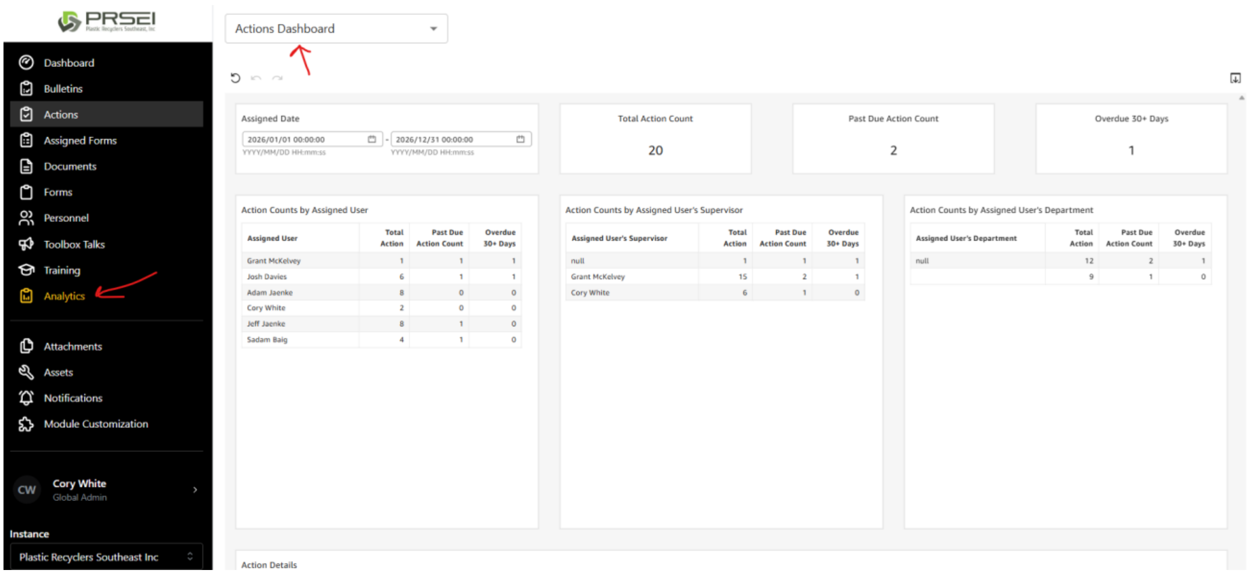
Other Admin Features

Analytics

The Analytics module gives you reports and dashboards on EHS activity across your organization.

1. Click Analytics in the left sidebar.

2. Use the available report tabs to view data on Training completion, Actions, Incidents, and more.

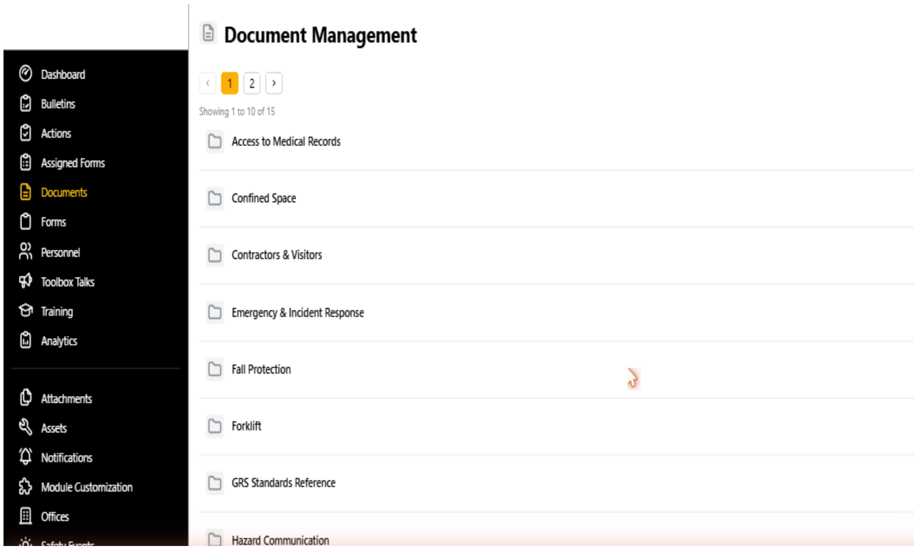


3. Use the date range and office filters to narrow your view.
4. Click Export to download reports as spreadsheets.

Documents

The Documents module is a file library where you can store and share safety documents, policies, and reference materials.

1. Click Documents in the left sidebar.



2. Click + Upload to add a new document or folder.
3. Employees can access Documents from their sidebar to find reference materials.