



Company Sign Up

For the most efficient and effective use of Safecore, we recommend the following User set-up;

- 1 - 3 Administrators (*1 core person but others to cover holidays, sick leave etc*).
- 1 - 3 Supervisors (*per site that your company is active on, depending on the size of the site*).
- Remainder assigned as employees

Additionally; companies with 20+ employees will have an account with Safecore, against which a monthly invoice will be raised for safety documentation uploaded during the previous month.

Smaller companies, sole traders and other individuals will require credit card details for payment when uploading their individual safety certification.

Administrators;

First time set-up takes just a few minutes;

Once you enter your name & email address (unique identifier for Safecore), an activation link will be sent to your email address from where you click on the link and it will bring you directly to the Safecore system.

As part of activation; Safecore will request mobile phone number as well as your company name.

As you input your company name the field will auto populate with similar named companies.

If your company does not already exist on Safecore continue to input your company name.

Note: If your company does already exist on Safecore then choose the correct company and continue with the sign-up process. As you are joining a company that already exists a message will be sent to your company's administrator on Safecore and they will accept you as an employee. They can also assign you as an Administrator or Supervisor as required.

My Dashboard Section;

On first and subsequent logins, you will be brought to the 'My Dashboard' page on Safecore.

- First login;

As you have created the company, you are by default a company administrator on Safecore and will be prompted to complete your company details (Address, website etc.).

- Subsequent logins;

My dashboard informs of all activities and requests requiring action.

- **Expiring Certificates;** all company employee safety certificates due to expire within the next 60 days.
 - 30-60 days to expiry; highlighted in blue.
 - 7-30 days to expiry; highlighted in amber.
 - < 7 days to expiry; highlighted in red.

Note; [Text expiry](#) alerts are sent to any employee with a cert that has 30 days to expiry and another text is sent on the date of expiry.

Note; A [weekly email](#) report of expiring safety certificates will be sent to Company Administrators.

- **Link Requests;** notification of requests from companies your company is subcontracting in to for access to your employees' safety certificates on that job.
- **Join Requests;** notification of requests from new employees to join your company on Safecore.
- **Invoices Due;** notification of outstanding invoices due for payment.

Employees Section;

- **Adding an employee;**

An Administrator can add other employees for the company as required under the **Employees** section by clicking on the Add Employee button. When a new employee is added they are automatically at employee level on Safecore. Only Administrators have the ability to set & change the individual's user level to Administrator or Supervisor level.

These newly added individuals can access their profile on Safecore by activating the link sent to their email.

Note; activation by individual is not required for Administrator to upload and/or review documents for that individual.

Note: Supervisors can also add employees as required or employees themselves can be requested to sign-up individually.

Additionally; the system facilitates a bulk upload of employees via the [Import Employees button](#) under the **Employee** section.

- **Uploading Safety Certificates;**

By expanding individual employees under the **Employee** section; All 3 user types have the ability to upload safety certificates against their own name. Additionally Administrators and Supervisors can upload safety certificates for all Company employees.

Once an employee has been added, it is possible to upload his/her safety certificates by clicking on the expand button. Thereafter it is a simple 3 step process.

- **Step 1:** Choose the type of safety certificate that you wish to upload from the Select Certificate drop-down menu.

- **Step 2:** Enter either the start date or the expiry date for the specific certificate (*system will auto populate 'other date' based on the lifespan of that particular safety certificate*).
- **Step 3:** Click on the Attach File button & choose document you wish to uploaded (*Any file format can be uploaded including Word, Pdf, JPEG,Photos etc.*).
 - **(Repeat steps 1 – 3 for any additional safety certificates that you wish to upload for the same individual)**
- **Step 4:** Click on the Add Certificates button.

Subcontracting Section:

Subcontracting Out Section;

Enables Administrators and Supervisors in your company access the safety certificates of employees of companies you have subcontracted out work to.

- **Link to a Company;** in this section Administrators and Supervisors have the ability to send a request for access to the safety certificates of the employees of a company to whom work has been subcontracted out to (via the Send Link Request button).
- **Link Requests;** once a link request for access has been sent the request will appear here.
- **Linked Companies;** when an Administrator or Supervisor at the company you are subcontracting work out to accepts the link request & enables access to some or all of their employees, the company name will appear in this section. Clicking on the company name will expand to show 'shared' employees & their respective safety certificates.

Note: Administrators or Supervisors have the ability to delete the link to any subcontractor at any time.

Subcontracting In Section;

- **Send Link to a Company;** in this section Administrators or Supervisors have the ability to give access to all or some of their employee's safety certificates for a specific period of time to any company subcontracted in to (via the Send Link button).
- **Link Requests;** if a company requests access to your company's employee's safety certificates, an Administrator or Supervisor has the option to either accept or reject. If the request is accepted, the Administrator or Supervisor inputs the date until which the access is granted and selects the relevant employees.
- **Linked Companies;** all other companies who currently have access to any of your employees' safety certificates are listed here.

Certificate Database Section:

This view provides Administrators or Supervisors with the ability to sort and/or filter information by specific certificate, company (own and Subcontractors), employee or site.

Site List Management Section:

Administrators or Supervisors have the ability to add new Sites under My Company Sites sub-section.

(Only Administrators have the ability to edit or remove existing Sites).

Additionally, Administrators or Supervisors have the ability to share specific sites with other companies and thereafter any such companies will appear under 'Site has been shared with' sub-section.

Similarly Administrators or Supervisors of another company may choose to share their specific site safety documentation with your company in which case details will appear under the 'Sites shared with your company' sub-section.

Once a Site has been shared, the site can not be deleted or the site name can not be changed.

Company & Site Documents Section;

It is possible to filter documents in this section for a specific site/location or by leaving the filter blank all company & site documentation will appear.

Company Documents; Uploading either Insurance or Safety Statement documents is a simple process;

- **Step 1:** Enter a name for the document you wish to upload.
- **Step 2:** Click on the Attach File button & choose the document you wish to upload (*Any file format can be uploaded including Word, Pdf, JPEG, Photos etc.*).
- **Step 3:** Click on the Upload button.

Site Documents; Uploading site documents is a simple process;

- **Step 1:** Enter a name for the document you wish to upload.
- **Step 2:** Choose a site from the drop-down menu.
- **Step 3:** Click on the Attach File button & choose the document you wish to upload (*Any file format can be uploaded including Word, Pdf, JPEG, Photos etc.*).
- **Step 4:** Click on the Upload button.

Note; Uploading **Fire Extinguishers, Harnesses & Inertia Reels or P.A.T. Tests** documents requires the User to enter either the start date or the expiry date (the system will auto populate 'other date' +/- 6 months).

My Company Section;

This view (Top Right of main screen) provides Administrators with details of the following;

- **My Company details;** from here Administrators have the ability to edit their company details (Name, address, email, website etc.).
- **Invoices Due;**
- **Invoices Paid;**
- **Charges;** listing of all outstanding charges yet to be invoiced. These can be sorted by date.

My Account;

This view (Top Right of main screen) provides Administrators with details of the following;

- **My Account;** from here all Users have the ability to update their own personal account information, namely name, mobile phone or email details. Additionally Users can update their password via the change password button.
- **Charges;** listing of outstanding charges that you specifically raised. These can be sorted by date.