



Get Started:

EVERYTHING YOU NEED TO GET UP AND RUNNING WITH RISKCHECK SYSTEM



Welcome to the Get Started Guide. Our goal is to help you learn the basics and understand the resources and tools available to help you use the new RiskCheck Management System easily and efficiently.

The new RiskCheck Management System's intuitive design makes it easy to manage, track and report on your Health & Safety, Environmental & Sustainability metrics. Our new user-friendly web based application addresses all aspects of top performing health & safety, environmental and sustainability programs while ensuring your entire portfolio stays up to date and compliant with legislation and corporate standards.

Environmental, Health & Safety Risk Management



Chapter 1 – Login



This first chapter will help you get comfortable with the fundamentals of accessing the system and Navigating to various functional areas. You will need to have your login account information ready which is provided by the RiskCheck Tech Support.

Note: If you do not have your login account details, please contact Tech Support by phone at 416-640-2444 or email at technicalsupport@riskcheckinc.com

In order to login to the RiskCheck Management System, please go to <https://www.new.riskcheckinc.com>.

- Please enter your Email Address and Password then hit the Sign In button

The screenshot shows the RiskCheck Sign In page. The page has a blue header with the RiskCheck logo on the left and a 'Language' dropdown on the right. Below the header is a white sign-in form. The form contains the following elements:

- Email address:** A text input field with a blue arrow pointing to it from a dashed box labeled 'Enter Your Email Address'.
- Password:** A text input field with a blue arrow pointing to it from a dashed box labeled 'Enter Your Password'.
- Remember me:** A checkbox.
- Sign In:** A button with a right-pointing arrow.

At the bottom of the page is an orange footer bar containing the text '©2015 RiskCheck Inc.'.

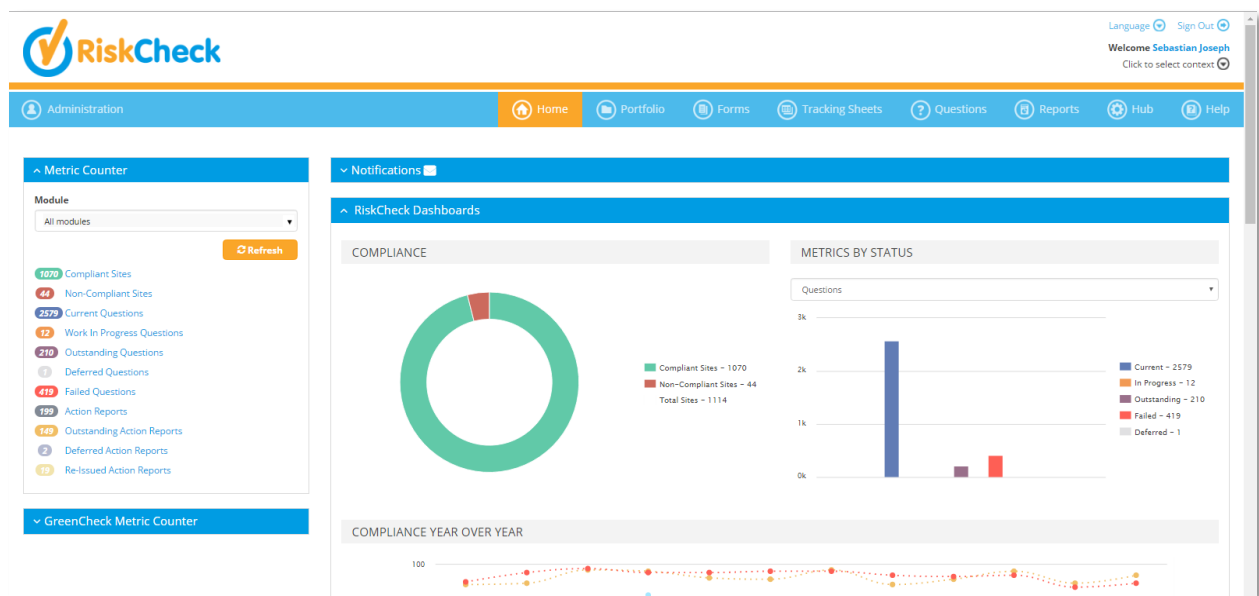
Chapter 2 - Navigation



Home Screen:

Once you have successfully logged into the RiskCheck Management System, you will land on the Home Screen. On this screen you will notice 4 main sections.

- RiskCheck Compliance Counters
- RiskCheck Metric Counters
- Notifications
- Dashboards



Compliance Counter:

This counter will show you the total number of sites that are associated to your portfolio. It also breaks down total number of 'Compliant' and 'Non-Compliant Sites'.

Metric Counter:

The metric counter is a call to action counter. When you click on a counter item, a pop-up window will appear listing sites that are associated to that particular metric. If you click on the site name in the pop-up window it will direct you to that site's Questions Page and display the list of questions associated to the counter item.

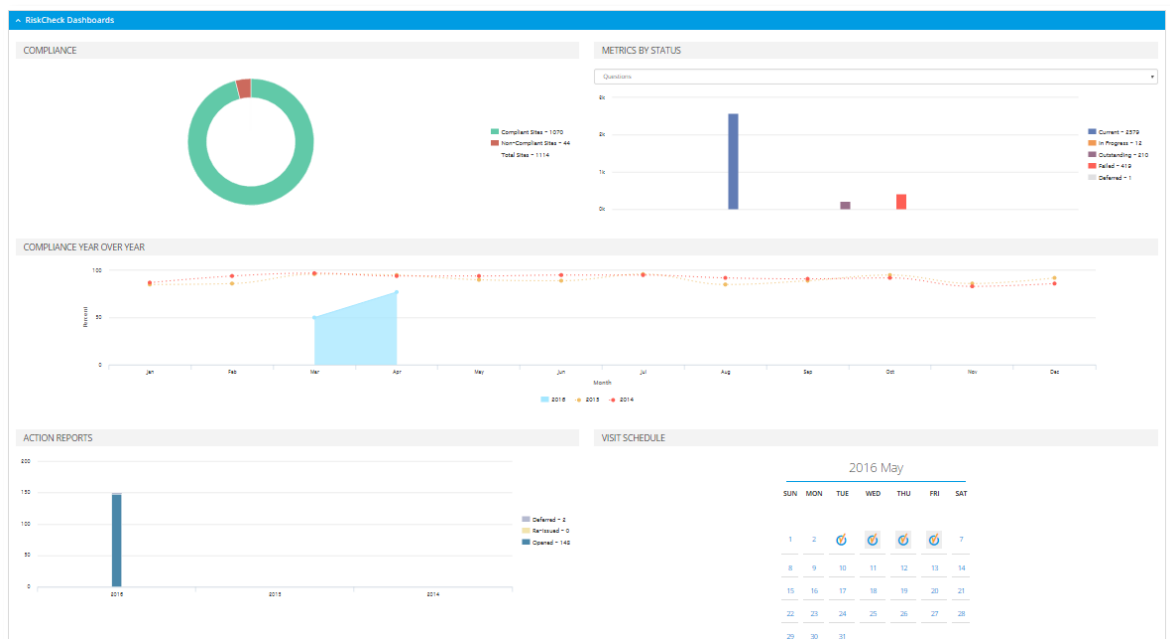
It should be noted that you can also filter the metric counter by Module. Once you do this and click on the Refresh button, all metrics associated to that metric will adjust.

Dashboards:

The Dashboard is a graphical presentation of many important indicators that can be customized by the user. This can include the current portfolio status (compliance snapshot) and trends related to key performance indicators.

Examples of Dashboards are:

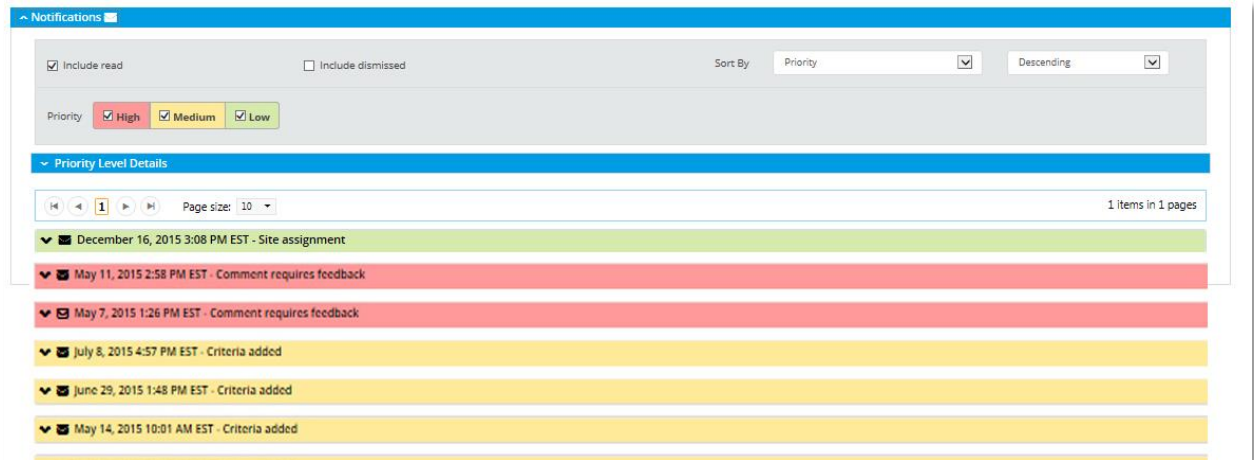
- Compliance: this will show what the overall % of compliance for your whole portfolio
- Metric by Status: this will show a breakdown of questions by status which is driven by the counts displayed in the metrics counter. You can also use the filter for this dashboard to look at Action Reports by status.
- Compliance Year over Year: this will show a comparison of your compliance for the current year compared to past years. Each point on the line represents the compliance % per month.
- Action Reports: this will show a comparison of Action Reports, based on status broken down by year.
- Site Visits: this will show upcoming site visits that have been booked



Notifications:

Note: By default this area is collapsed, click on the blue header to expand and view all your notifications.

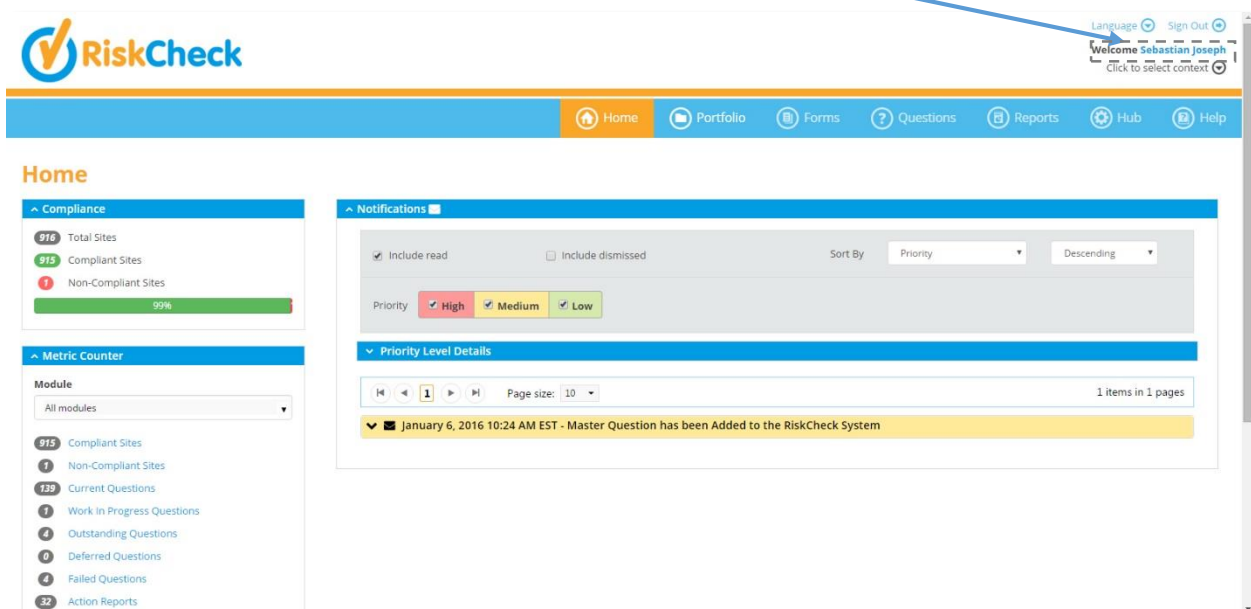
Notifications provide a means of delivering messages to your home screen that stem from events or predefined questions in the system. They are meant to bring attention to important items and enable you to take action. Notifications can be set to a specific priority (High, Medium & Low). You can filter your notifications in the comment boxes based on priority to help you quickly access specific notifications from portfolio users.



Set Default Home Page:

When you login to the system, by default your landing page is set to the Home Page. You can change the default landing page to be the Questions Page. To do this, please follow the steps below;

1. Click on your Name in the top right corner of the Home Page.



2. In the Profile Screen that appears, click on the dropdown list under “Default Page”. Change the option to be “Questions” and hit save. Now every time you login, you will be directed to the Questions Page.

The screenshot shows the RiskCheck Profile screen. At the top is the RiskCheck logo and a navigation bar with links: Home, Portfolio, Forms, Questions, Reports, Hub, and Help. The user is logged in as Sebastian Joseph. The profile form contains fields for First Name, Last Name, Title, Email, Phone, Mobile, Company, Time Zone, and Language. A dashed box highlights the 'Default Page' dropdown menu, which currently shows 'Home'. A blue arrow points from the instruction text to this dropdown. Below the form are buttons for 'Change Password', 'Cancel', and 'Save'. The footer shows the copyright notice: ©2016 RiskCheck Inc.

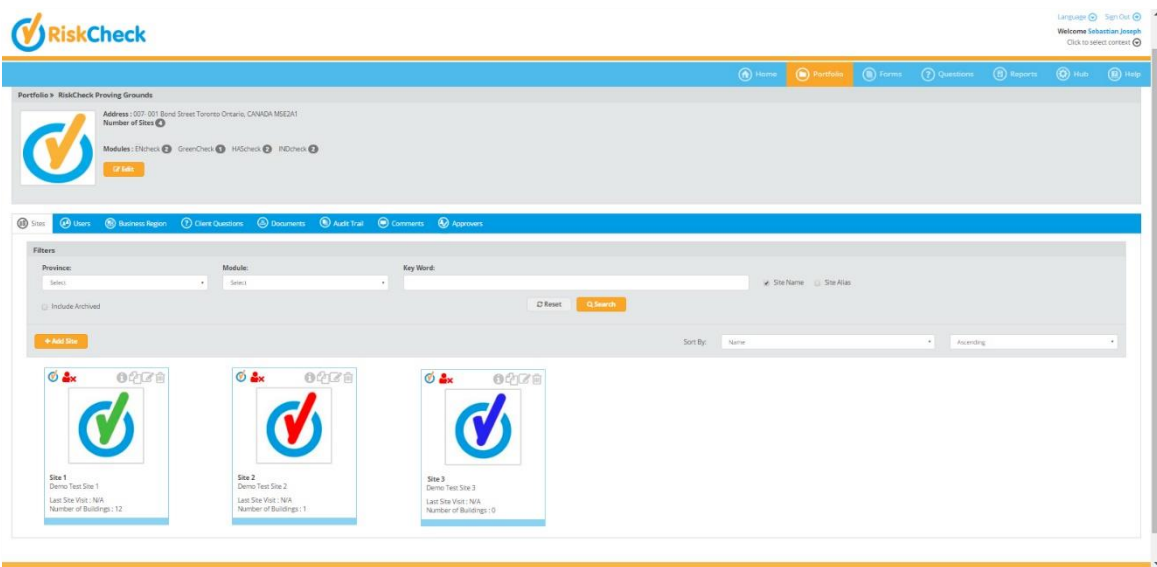
Main Menu Bar:

You will notice a blue Main Menu bar that is static at the top of your screen. This bar will appear in every area of the RiskCheck Management System. Any time you want to access a main functional area of the system, just single click on the Menu tab and the page will load.



Portfolio Tab:

As we continue to strive to build strong ongoing partnerships with our clients, the Portfolio tab is one of the main areas we want users to engage with. It will allow you to easily view and access your sites, buildings and all of their pertinent information.



Owner/Manager Level Access:

This is the highest level of the Hierarchy in our Portfolio, you will notice your company logo in the header area of the page, along with some general information (address and modules subscribed).

Client Level Access:

When you are at the Client level, you will notice your company logo in the header area of the page, along with some general information (address, # of sites counter and modules subscribed)

Portfolio Taskbar:

You will notice a Blue Taskbar that is static and is located below the Client header. This Taskbar allows you to access key functional areas that pertain to your Portfolio. Anytime you want to access a main functional area, just single click on a Tab on the Taskbar and the page will load.



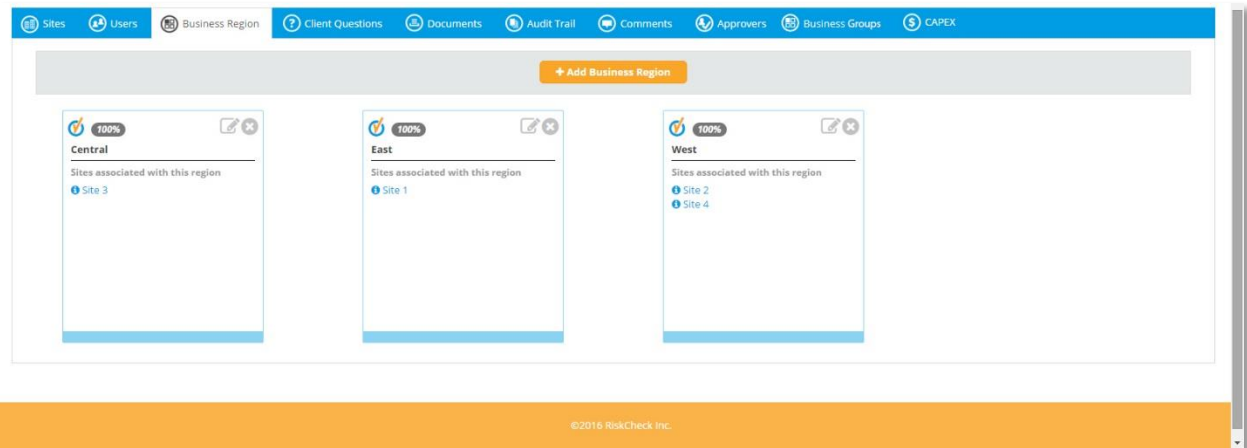
Sites:

- This Tab will show all sites that belong to your portfolio.

Users:

- This Tab will show the users that are associated to your portfolio

Business Regions:



- Although we will pre-populate;
- This Tab allows you to define your own business regions. To create a business region, do the following:
 1. Click the “Add Business Region” button Enter in the name of your business region (English & French), then hit Save. Once you have created a business region, go to the Site Card and edit icon on the Site Card.
 2. Associate the site to the business region you have created and hit save.
 - Example: East, West, GTA (Greater Toronto Area)...

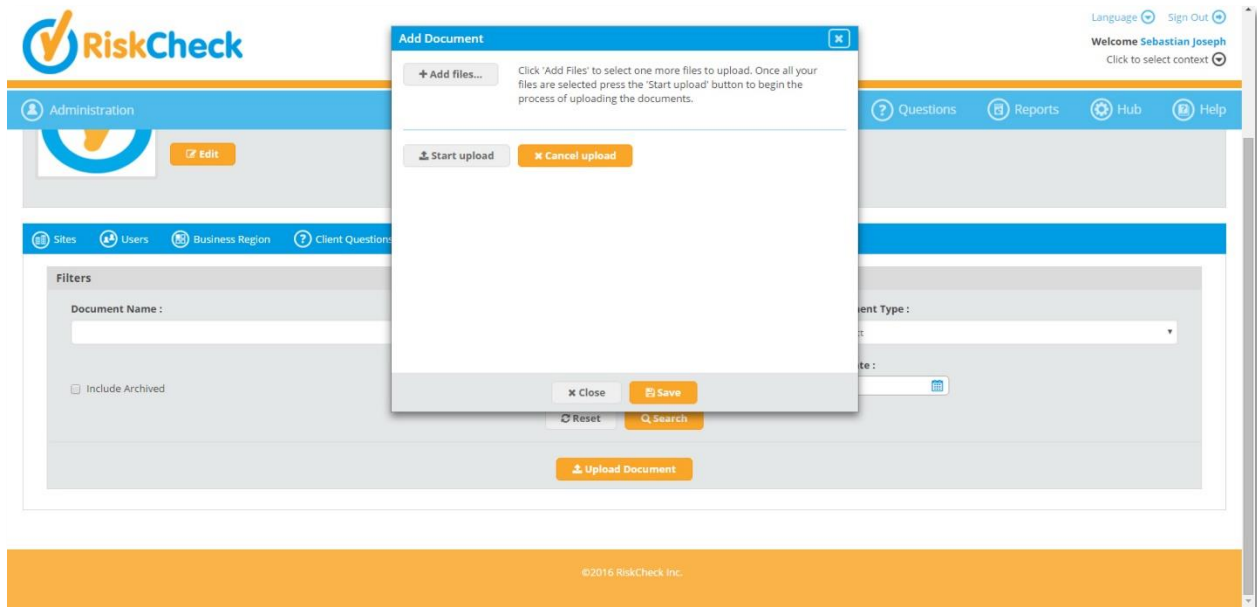
Note: Once a site is associated to a region (can be associated to only one region) the compliancy will be calculated and will impact the overall regional compliancy. If the site name text appears in “blue” the site is Compliant. If the site name text appears in “Red” the site is Non-Compliant.

Client Questions:

- In this Tab you now have the ability to create your own client questions. To do this, click on the tab, then click on the “Add Question” button. Enter all the details associated to the question and hit Save.

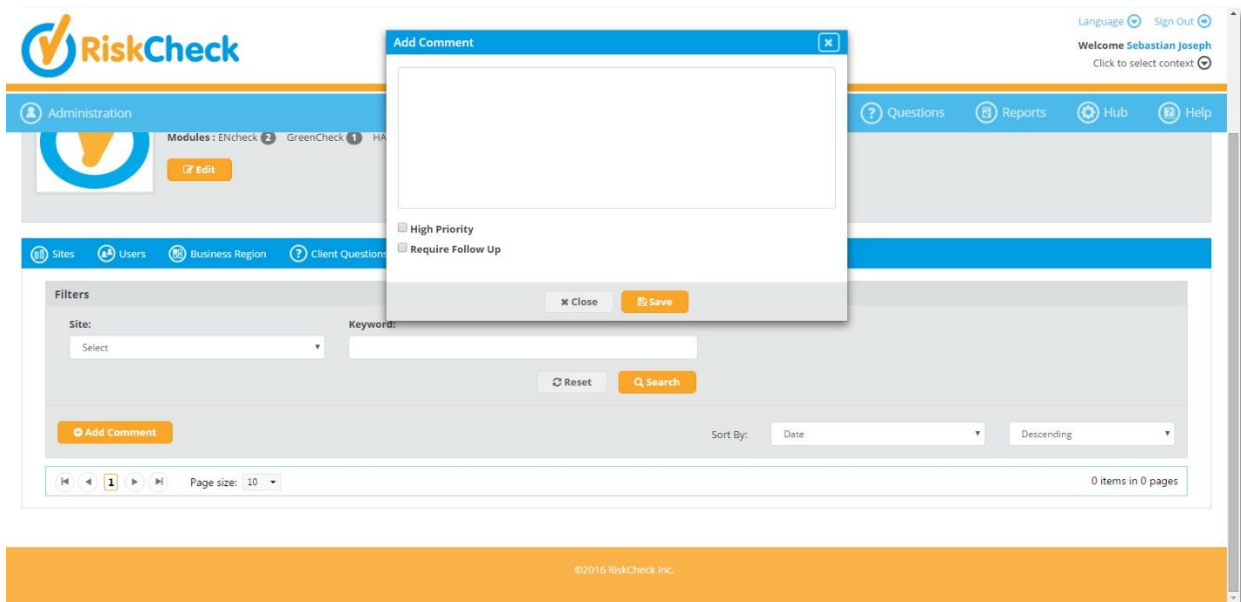
Documents:

- In this Tab you will be able to upload and download documents that are associated to your portfolio. Documents can be added to a site and are still accessible at the Client level.
- To add a document, click on the “Upload Document” button. Then you can either click on “Add Files” button or you can drag and drop a file into the upload window. You can upload a maximum of 15 documents at a time. When you upload a document, you will be asked to select a document type to associate with the file you are uploading. This helps categorize documents and allows for easier search ability.



Comments:

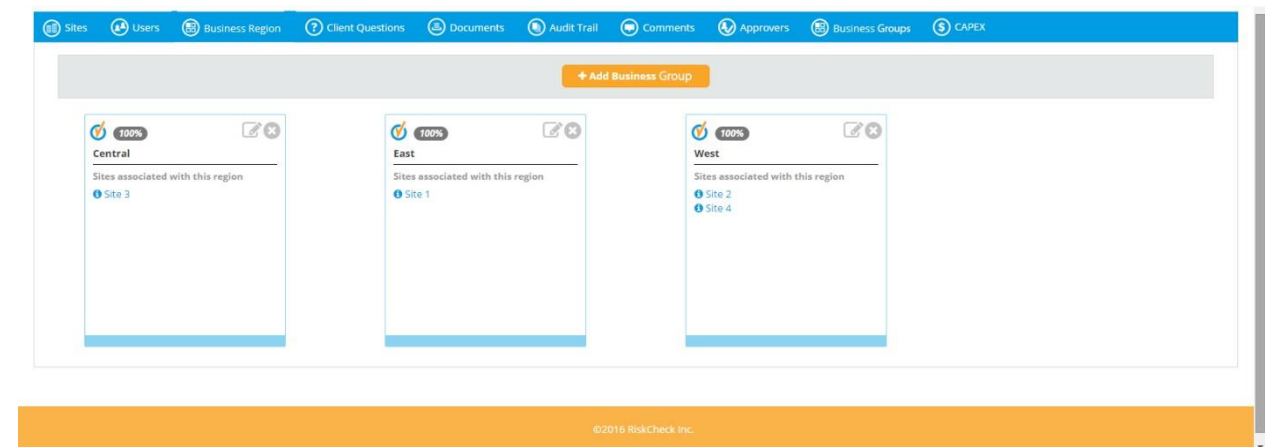
- This is a central repository for all comments left in the system for internal use as well as comments left for RiskCheck to action.
- You are able to respond to a comment by hitting the reply button within the comment which threads it under the original comment in the question section and a reply notification is sent to the person who commented. These comments are kept in this section as well as documented with the question itself.



Approvers:

- In this Tab, you will be able to view an Approvers group or an individual designated as an Approver.

Business Groups:



- This Tab allows you to define your own business groups. To create a business group, do the following:
 1. Click the “Add Business Group” button Enter in the name of your Business Group (English & French), then hit Save. Once you have created a Business Group, go to the card and edit icon on the card. Then select the sites that you want associated to each the group. Hit save when done with selections.

Note: Once a site is associated to a group (it can be associated to one or more groups) the compliancy will be calculated and will impact the overall group compliancy. If the site name text appears in “blue” the site is Compliant. If the site name text appears in “Red” the site is Non-Compliant. Groups are defined on a per-user basis so each user could have different groups setup.

CapEx:

- In this Tab, you will be able to view CapEx information per item recorded on any Action Report associated to the Site. You can also add CapEx items that are specifically associated to your site.

The screenshot displays the RiskCheck web application interface. At the top, there's a navigation bar with the RiskCheck logo and user information (Welcome Sebastian Joseph). Below this is a secondary navigation bar with tabs: Administration, Home, Portfolio, Forms, Tracking Sheets, Questions, Reports, Hub, and Help. The main content area shows the 'Portfolio' tab selected, displaying details for 'Demo Client' and 'Demo Site 2'. It includes fields for Address, Subscribed Modules, and Live Date, along with an 'Edit' button. Below this is a sub-navigation bar with tabs: Buildings, Users, Client Questions, Documents, Audit Trail, Comments, Approvers, CAPEX, and Inclusion. The 'CAPEX' tab is active, showing a 'Filters' section with checkboxes for 'Standalone CAPEX', 'Include Archived Standalone CAPEX', and 'Action Reports CAPEX'. There are 'Reset' and 'Search' buttons. Below the filters is an 'Add CAPEX' button. The main table, titled 'Standalone CAPEX', has columns for Cost Estimate, Item Name, Scheduled Date, and Buildings. A single row is visible with a checkmark icon, a cost estimate of \$20,500.00, item name 'Machine Guarding', and scheduled date 'June 21, 2016'.

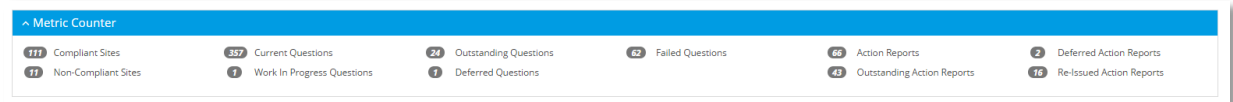
	Cost Estimate	Item Name	Scheduled Date	Buildings
<input checked="" type="checkbox"/>	\$20,500.00	Machine Guarding	June 21, 2016	

Chapter 3 – Questions Page



Metric Counter:

The Metric Counter is a static dashboard that displays at a glance analytical portfolio information while working in the Questions Page. By default the Metric Counter is collapsed. To expand it, just click on the blue bar labeled “Metric Counter”.



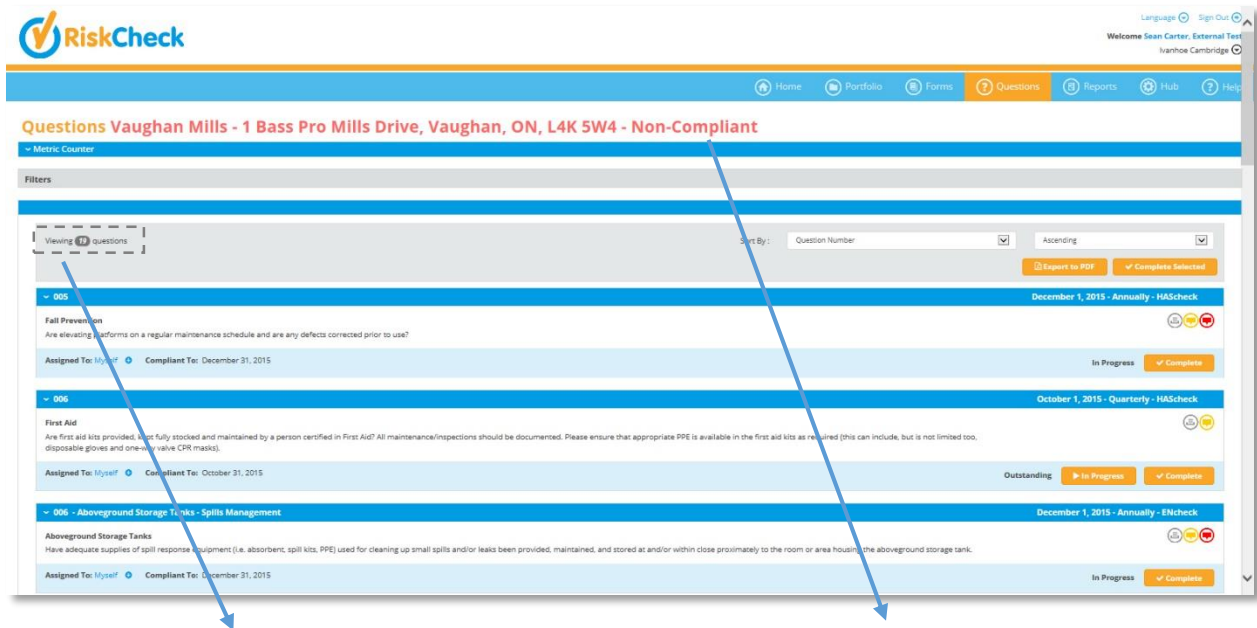
Filters:

This area allows you to sort the information on the Questions Page into smaller parts in order to work more efficiently. While a single filter can be used individually, they are frequently strung together to form a string. Some Filter attributes will not populate when you click on the dropdown list as some attributes are related to one another. Once you have selected the attributes for which you want to filter, hit the “Search” button and results will display below. By default, the Filters area is expanded but you can collapse it by click on the blue bar labeled “Filters”.

A "Filters" section with a light gray background. It contains several dropdown menus and checkboxes. The filters are: Client (Demo Client), Site (Demo Site), Question Status (Current, In Progress, Outstanding), Module (HAScheck), Characteristic (Select), Sub-Characteristic (Select), Assigned To (Select), Action Report Status (Select), Start Date (May 2015), To (May 2016), Recurrence (Select), and Keyword (empty text field). At the bottom, there are four checkboxes: "Contains Comments", "Contains Documents", "Contains Form", and "Contains Tracking Sheet". Below these are "Reset" and "Search" buttons.

Questions:

By default, when you access the questions page, if you only have access to one site, then the questions will automatically be displayed. At the start of each session, you will see only Questions with a status of Current, Work In Progress and Outstanding. If you want to see other status questions, you will have to adjust the “status” filter at the top of the screen and then hit search.



Question Counter: this counter will show you're the number of questions you are viewing.

Question Page Header: this will show the name of your site along with your sites compliancy status.

Question Breakdown: all questions viewed by default are in a collapsed state.



Assigned User & Compliance

Question Number, Characteristic and Sub-Characteristic

Question Text

Effective Date

In Progress/Complete

Icons: Document Attached, Comments, Action Reports, Legislation, BMP, Corporate Directive

Expanded Question: To expand a question, click anywhere on the blue header bar.

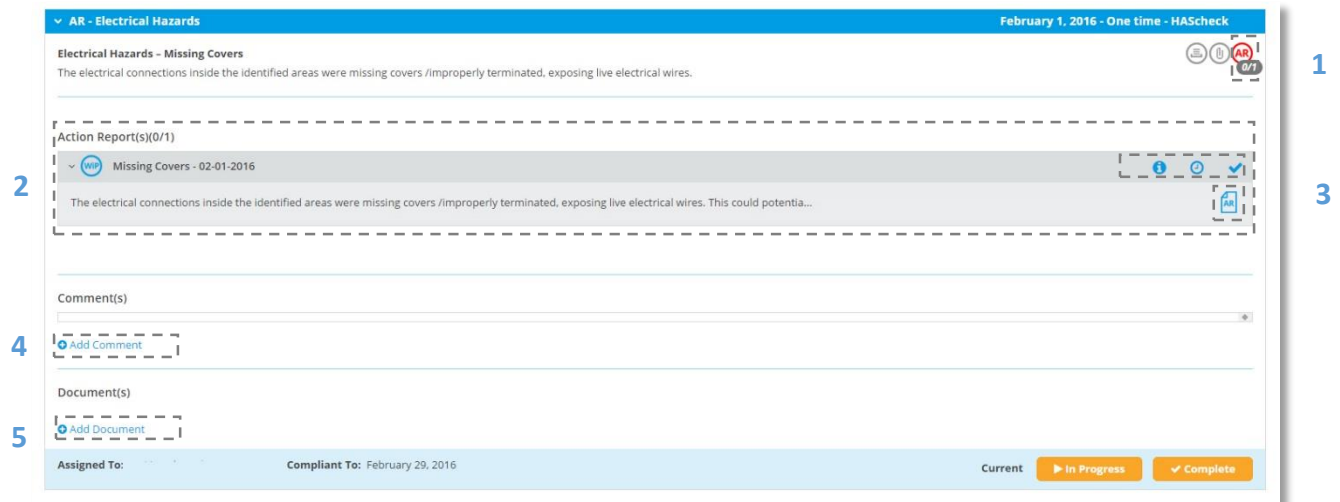
The screenshot displays a software interface for managing safety questions. At the top, a blue header bar contains the text "015 Chemicals - Container Storage" on the left and "December 1, 2015 - Annually - Elncheck" on the right. Below the header, the question text reads: "As a best management practice, have building maintenance chemicals been kept tightly closed and stored/decontaminated away from floor drains that are connected to sewers? Unless secondary spill protection measures are provided, ensure chemicals are stored a safe distance away to minimize the potential of a spill from reaching the nearest floor drain." To the left of the question, five blue numbers (1-5) are placed next to dashed boxes highlighting specific UI elements. Box 1 points to the "Answer" label. Box 2 points to a row of three buttons: "Save", "Work In Progress", and "Complete". Box 3 points to a blue "Add Comment" link. Box 4 points to a blue "Add Document" link. Box 5 points to a blue "Request Deferral" button. Below the question, there are input fields for "Comment(s)" and "Document(s)". At the bottom of the interface, a status bar shows "Assigned To: Myself", "Compliant To: December 31, 2015", and a "Current" status with "Work In Progress" and "Complete" buttons.





1. If the question requires an answer, insert here
2. Action Buttons – Save | Work In Progress | Complete
3. Add a Comment – click to add a comment
4. Add a Document – click to add a document
5. Request Deferral – when you hit the button, a pop-up window will appear. To complete the deferral request, you must enter the reason for the deferral and the time period you want to set for the deferral.

Note: when you click on the “Complete” button to complete a question, the question will no longer be shown. To retrieve completed questions, you must adjust the question status filter to show completed questions.

Action Reports:

Action Reports are hazards or deficiencies that are identified by the RiskCheck Consultant during the Risk Assessment whereby action needs to be taken for remediation. By default, when you access the questions page, if you only have access to one site, then the questions will automatically be displayed. At the start of each session, you will see only Questions with a status of Current, Work In Progress and Outstanding. If you want to see other questions like Action Reports easily, the user can adjust the “Action Report Status” filter at the top of the screen and then hit search.



1. If the question consists of an Action Report, a Red (AR) icon will appear on the question
2. Action Report(s): In the grey area inside a question, the Action Report will appear. On the header of the grey area, the Action Report status icon will appear (WIP – Work In Progress) along with the title of the Action Report and the Issued Date. In the body of the grey area, the Corrective Action will be available.
3. The following icons will be available
 -  To Open the Action Report, click on the icon
 -  To Defer the Action Report, click on the icon, a pop-up window will appear. To complete the deferral request, you must enter the reason for the deferral and the time period you want to set for the deferral
 -  To Complete the Action Report, click on the icon
 -  To access the Action Report PDF Report, click on the icon
4. Add a Comment – click to add a comment
5. Add a Document – click to add a document

Action Report – Information Pop-Up Window:

Action Report

Characteristic:
Client:
Site:
Module: HAScheck
Entered: February 1, 2016 3:48 PM EST

1 [Details] [Findings] [Comments] [Attachments] [CAPEX]

Affects Compliance: * ☒ Yes ☐ No

Risk Weight: None

Start Date: 02-01-2016

☐ Override start date restrictions

Building: All Buildings

Legislative Code: * O. Reg. 164/99

2 Action Report PDF: [AR PDF icon]

3 [Close] [Save]

1. Action Report Tabs:
 - a. Details Tab: Provides all general information about the AR.
 - b. Findings Tab: Provides the title of the AR and the Corrective Action
 - c. Comments Tab: Add a comment to the AR
 - d. Attachments Tab: Add an attachment to the AR
 - e. CapEx Tab: Add Capital Expense information pertaining to the AR
2. Action Report(s) PDF icon: to access the Action Report PDF Report, click on the icon
3. Close/Save Button: User action buttons to either Save the changes made or close the window.



Question Status's:

- **Current Questions:** Questions within your site(s) that are active for the current compliance period.
- **Failed Questions:** Questions within your site(s) that haven't been answered and completed within the given compliance period.
- **Work In Progress Questions:** Questions within your site(s) that the user actions as work in progress within the current compliance period. This states that the question is being worked on but not completed. If question does not get completed within the given compliance period, the site will become non-compliant
- **Outstanding Questions:** Questions within your site(s) where Legislation asks for documentation during specific times of the year (ex: quarterly, semi-annual, and annual). The compliancy is set to be answered within the first month of the recurrence period and if not answered, it will cause the site to be non-compliant. The question will fail and a new question will appear on the next recurrence period and maintain the non-compliance status until answered.
- **Deferred Questions:** Questions within your site(s) that a user has deemed to not be actioned in the current month and can move the question to another month time period. Once the question is reassigned to a future date, the question becomes flagged as a Deferred Question. As a best business practice, Deferred Questions will have to be approved by management in order for the Deferred Question to be moved to a new time period.
- **Completed Questions:** Questions within your site(s) that the user actions as complete within the compliance period.
- **Action Reports (AR's):** Action Reports are hazards or deficiencies that are identified by the RiskCheck Consultant during the Risk Assessment whereby action needs to be taken for remediation. Photos, legislation and guidance notes are attached.
- **Outstanding Action Reports:** Action Reports that have passed their compliance period and have not been remediated.
- **Re-Issued Action Reports:** Action Reports in your site(s) that have been re-appended to the portfolio site due to not completing the remediation after the verification at the site has taken place. Re-Issue only applies to Action Reports.