

# SafeGuardAI

## User Manual

WhatsApp Workplace Safety Assistant & HSE Dashboard

Version 1.0 | 15 Feb 2026

### **What this manual covers**

Asking safety questions by WhatsApp (text or voice note)

Requesting a visual safety guide image (optional)

Using the HSE Dashboard to upload guides, monitor usage, and export reports

## Table of Contents

- Quick Start (Workers)
- Asking Questions on WhatsApp
- Voice Notes (Audio Messages)
- Requesting a Visual Safety Guide Image
- Getting Better Answers (Tips)
- Common Issues & Fixes
- HSE Dashboard (Officers/Admin)
- Managing Safety Guides (.txt uploads)
- Reports & Exports
- Data, Privacy, and Audit Trails
- Support Checklist

## 1. Quick Start (Workers)

SafeGuardAI works inside WhatsApp. No app installation is needed.

### To use it:

- Open WhatsApp and message your company's SafeGuardAI WhatsApp number.
- Type your safety question (or send a voice note).
- Read the reply and follow the guidance exactly as written in your approved safety guides.

### Example questions

Task	Message you can send
Welding	What PPE do I need for welding in our workshop?
Chemical handling	What is the first aid procedure for chemical splash to eyes?
Working at height	What is the step-by-step ladder safety checklist?
Lockout/tagout	How do I perform lockout tagout for the conveyor maintenance?

## 2. Asking Questions on WhatsApp

Send a clear question. The system answers only using your uploaded company safety guides.

### Good question format

- Start with the task: what you are about to do.
- Add the location or equipment type (if relevant).
- Ask for a checklist or procedure if you need steps.

### Examples

- I am using an angle grinder. What PPE is required and what checks should I do before starting?
- What is the spill response procedure for diesel in the loading area?
- What are the safe lifting limits and required techniques for manual handling?

If the answer says the topic is not in the safety guides, contact your HSE officer to add the missing procedure.

### **3. Voice Notes (Audio Messages)**

You can send a voice note instead of typing. Voice notes are transcribed before answering.

#### **Best practices for voice notes**

Speak clearly and keep it under 30-45 seconds if possible.

Say the key words: task name, equipment, hazard, and what you need (procedure / PPE / checklist).

Avoid background noise when possible.

#### **Example voice note script**

“I am about to do welding inside the workshop. What PPE and ventilation steps are required? Please give me a short checklist.”

## 4. Requesting a Visual Safety Guide Image

If enabled by your organization, you can request an image to illustrate safe setup or PPE. The reply may include an image along with text.

### How to request an image

Add a phrase like: "show me", "picture", "photo", or "image".

Be specific about what you want to see (PPE, workstation layout, barrier placement, etc.).

### Examples

Show me a picture of the correct PPE for welding.

Image of a safe ladder setup near a wall, with the correct angle and footing.

Photo showing correct eye-wash station usage steps (as per our procedure).

Images are guidance aids. Always follow the written procedure and your onsite supervisor instructions.

## 5. Getting Better Answers (Tips)

Use the exact task name used in your site procedures (e.g., “LOTO”, “confined space entry”).

If you have a safety guide title or section name, mention it.

Ask for a checklist if you need steps: “Give me a checklist”.

If your question involves chemicals, include the material name (or SDS product name).

If your question involves equipment, mention the model/type (e.g., “forklift”, “scissor lift”).

### **What the system will not do**

It will not invent procedures that are not in your approved guides.

It will not override supervisor instructions or site rules.

It is not a replacement for emergency response - call your emergency line if there is immediate danger.

## 6. Common Issues & Fixes

Issue	What it means	What to do
No reply on WhatsApp	System may be offline or webhook not reachable.	Wait 1-2 minutes and try again. If still no reply, inform your supervisor/HSE.
Reply says topic is not in guides	The needed procedure was not uploaded or indexed.	Ask HSE to upload the relevant procedure (plain text .txt).
Voice note failed	Audio could not be processed or there was an unsupported format issue.	Try again with a shorter voice note, or send text instead.
Answer is too general	The question did not include enough context.	Add location/equipment/material and ask for a checklist or steps.



## 7. HSE Dashboard (Officers/Admin)

The dashboard is for HSE officers and admins to manage safety guides and monitor usage.

### Open the dashboard

Open your browser and go to: <http://localhost:8000/api/dashboard/>

Log in using your admin credentials.

### What you can do

Upload safety guides (plain text .txt).

View recent chats (text and voice).

See which guides are used most.

Export a CSV report.

## 8. Managing Safety Guides (.txt uploads)

SafeGuardAI answers only from uploaded guides. Keep the guide library clean and up to date.

### Before uploading

Use plain text (.txt) only.

Keep one procedure per document when possible (clear title).

Use headings and numbered steps (easy to reference).

Remove scanned-image text or unreadable characters before uploading.

### Upload steps

In the dashboard, click "Upload Document".

Enter a clear guide name (this name will show in usage reports).

Choose the .txt file and click Upload.

Confirm the guide appears in the Safety guides list.

**Tip:** Use consistent naming (e.g., "LOTO - Conveyor", "PPE - Welding", "SDS - Acetone").

## **9. Reports & Exports**

Use exports to track engagement and identify missing procedures.

### **CSV Export**

From the dashboard, select "Export Report (CSV)".

Use the report to review: worker questions, which guides were referenced, and usage frequency.

### **Suggested monthly review**

Top 10 questions asked (and whether the answers were complete).

Any questions that returned “not in guides” - add the missing procedures.

Most-used guides - confirm they are the latest revision.

Voice note usage - confirm workers are comfortable using voice notes.

## **10. Data, Privacy, and Audit Trails**

SafeGuardAI keeps an audit trail of worker questions and the responses provided.

### **What is stored**

- Worker phone number (WhatsApp identifier).
- Message content (text or transcribed voice note).
- System response text and whether an image was included.
- Safety log entry with the guide(s) referenced.

### **Good practice**

- Avoid including personal medical details in messages. Use the emergency process for incidents.
- Restrict dashboard access to authorized staff only.
- Keep your safety guides current and aligned with site policy.

## 11. Support Checklist

If something is not working, collect the details below and send them to the system administrator.

Time of issue (date and approximate time).

Worker phone number (or last 4 digits).

What was sent (text vs voice).

Screenshot of the WhatsApp conversation (if possible).

If dashboard related: the page you were on and what you clicked.

If available: server status page at `/api/webhook/status/`.

End of manual.