

Establishments & Establishment Groups

Establishments and establishment groups allow you to filter records, control user access and target e-mail notifications users receive by work location, job site, state, region, subsidiary or any organizational grouping you like.

Use establishments and establishment groups to:

- Group physical work locations for printing OSHA 300 forms (Step 1)
- Filter reports, safety incidents, inspections, employee portal submittals by job site, region, etc. (Step 1)
- Schedule training by department, work location, etc. (Steps 1 & 2)
- Control user access and the e-mail notifications they receive (Steps 1, 2 and 3)

Getting Started

Step 1: Add Establishments and Establishment Groups

- Select Establishments from Settings Menu
 - Add establishments (work locations, departments, etc.)
- Select Establishment Groups from Settings Menu
 - Add establishment groups by selecting establishments belonging to each group (region, subsidiary, etc.)

Completion of Step 1 allows you to:

- 1) group physical work locations for printing OSHA 300 forms &
- 2) filter reports, safety incidents, inspections, employee portal submittals by department, region, etc.

Step 2. Connect Employees to Establishments (group employees)

- Assign employees to establishments when:
 - Adding an establishment (Step 1 above) or
 - Adding a new employee (Settings > Employees > Add Employee) or
 - Updating existing employee (Settings > Employees > Show / Edit)

Completion of Steps 1 and 2 allow you to group employees for scheduling training and inviting course attendees.

Step 3. Connect Users to Establishments (control user access and e-mail notifications)

- Go to Settings and select User then Manage Access
 - Select (assign) either an Establishment or an Establishment Group
 - A user can be assigned to one establishment or one establishment group (not both and not more than one)
 - To assign a user access to multiple establishments, create an establishment group made up of establishments you want the user to access, then assign that establishment group to the user.
 - A user assigned to an establishment or establishment group (My Organization):
 - Will only receive e-mail notifications linked to that establishment or establishment group.
 - Will have access to records linked to that establishment or establishment group.
 - Will have access to records not linked to any establishment or establishment group.
 - Will not have access to records linked to other establishments or establishment groups.
 - A user not assigned to any establishment or establishment group will have access to all establishments and groups and all employees (Entire Organization)
 - When scheduling a course, a user assigned to an *establishment* or establishment group may invite employees assigned to the same establishment or group as the user. The user may also invite employees who have not been assigned to any establishment (a.k.a., un-assigned).
 - A user may **view** work restrictions for all employees reporting to a supervisor if the supervisor is assigned to the same establishment as the user --- even if some employees are not assigned to that establishment. However, a user may **edit** work restrictions for only those employees scoped to them.
 - Establishment user access control does not apply to:
 - System Administrators--- admins can access everything.
 - Corrective action implementation --- implementation of a corrective action can be assigned to any user authorized to implement corrective actions.

Completion of Steps 1, 2 & 3 allows you to limit the employees a user can access and the e-mail notifications they receive.