

ADMINISTRATIVE SETUP CHECKLIST

INCIDENT MANAGEMENT

REQUIRED

- ☐ Assign **Default Responsible for Review (Incident)** user role. If this user role is not assigned, most users will be unable to complete the investigation of an incident or submit a hazard identification.
- ☐ Assign **Default Responsible for Closure (Incident)** user role. If this user role is not assigned, most users will be unable to complete the investigation of an incident or near miss.

OPTIONAL

- ☐ Assign **Default Responsible for Investigation (Incident)** user role. Assigning this role will mean that the system automatically assigns the responsible for investigation based on the location of an incident or near miss.
- ☐ Create **incident rate targets** to allow for the comparison between actual performance and targets using the Health & Safety Statistics report.
- ☐ Create **contractor profiles** for the contracting companies you work with. Companies in this list will be suggested to users in Contractor fields throughout the application.

