Vitanet

The most extensive and fully customizable employee and asset database.

- Create employee profiles and save their information and personal documents
- Save employee Trainings and Certifications
- Load all of your Assets (Ex. Trucks and Equipment)
- Save asset information and documents (Ex. pictures, Registration cards, Insurance cards)
- Create and run reports (Ex. Expiration Reports)
- Ability to schedule and receive reports via email
- Create Safety Incident Logs

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TECHNOLOGY

Training Manual / Tutorial

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Company Set Up

Select "Settings" from the top Menu

1. To Add Company Logo and Company Name
   A. Under Settings Select "Company" in the bottom menu. Select Browse and find your Company Logo in your files. Now Double Click the file and then type in your company name in the box below your company logo. To Save your work don't forget to select the save Changes button in the bottom right of the screen.

2. To Customize Employees
   A. Under Settings Select Employees in the bottom menu.
   B. **Personal Documents** – in the box below type in the name of the document you would like to save a copy of. (example: Driver License, Social Security Card, etc.) Select the "Add New" button to the right of the screen to add another document. When you are finished select the "Save Changes" button.
   C. **Job Titles** – In the box below type in the first Job Title that you would like to list in this section. (example: Supervisor, Crew Leader, etc.) Select the "Add New" button to the right of the screen to add another Job title. When you are finished select the "Save Changes" button.
   D. **Skills and Training** – In the box below type in the first Skill or Training that you would like to list in this section. (example: Aerial lift, torching, etc.) Select the "Add New" button to the right of the screen to add another Skill or Training. When you are finished select the "Save Changes" button.
   E. **Licenses and Certifications** – In the box below type in the name of the Certification or License that you would like to save a copy of. (example: Forklift Certification, CPR/First Aid, etc.) Select the "Add New" button to the right of the screen to add another License or Certification. When you are finished select the "Save Changes" button.
   F. **Extra Parameters –** In the box below type in the name of the Extra Parameters that you would like to track or save a copy of. (example: Id Badge, Employee id number, Vacation hours, etc.) Make sure to then select the type (number, text, date, attachment or multiple choice) from the box to the right. Now Select the "Add New" button to the right of the screen to add another Parameter. When you are finished select the "Save Changes" button.

3. To Customize Assets
   A. **Asset Types** – In the box below type in the name of an Asset Type that you would like to keep data on. (example: vehicles, excavators, etc.) Now select the "Save Changes" button. After saving a "Configure" button will appear to the right, select this button.
   B. **Configure Parameters** – In the box below type in the name of the Asset Information that you would like to save. (example: year, make, model, Registration Card, Insurance Card, etc.) Now be sure to select the type (number, text, date, attachment or multiple choice) from the box to the right. If you have entered an Expiration date be sure to select the "expiration date" box to the right. Once you have done this Save your changes and if you need to add more select the "Add New"

4. To Customize Incident Types
   A. **Incident Types** – In the box below type the name of a type of Safety Incident that you would like to track. (example: Safety Glasses, Hard Hat, PPE etc.…) Select the "Add New" button to the right of the screen to add another Incident Type. When you are finished select the "Save Changes" button.

Employees

Select "Employees" from the top Menu

1. To Create a New Employee
   A. Select the "Create" button on the left side of the screen. You are now in the Create Employee Screen. Complete all of the information in the "Profile" tab (First Name, Last Name, Hire Date, …)
      - To Add a Photo select the "Browse" button to the right of the screen. Find the correct photo on your computer and then "Double Click" the photo.
      - To Add "Job Titles" and "Skills/Trainings" select the "+" symbol next to the appropriate section. In the Drop down menu that appears Select all appropriate Titles and/or Trainings.
      - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**
   B. Now Select the "Extra" tab in the top menu of the Create Employee Screen. Enter all of the appropriate information.
      - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**
   C. To Upload Employee Licenses and Certificates in the top menu of the Create Employee Screen Select the "Licenses/Certificates" tab. Scroll down and Select the appropriate License/Certificate. You now have 2 options to Upload Documents.
      - First, you can Select the "Browse" button and find the correct document on your computer and then "Double Click" the document. The document will now appear in the window and you will see the PDF. If this document has an Expiration date, be sure to enter the Expiration date in the "Expires" window.
      - Second, you can find the correct document on your computer and "Drag and Drop" the document into the window. The document will now appear in the window and you will see the PDF. If this document has an Expiration date, be sure to enter the Expiration date in the "Expires" window.
      - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**
   D. To Upload Employee Personal Documents in the top menu of the Create Employee Screen Select the "Personal Document" tab. Scroll down and Select the appropriate Personal Document. Now follow the directions for Uploading "Licenses/Certificates".
      - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**
   E. When you are finished Creating the New Employee and Uploading, and Saving, all Certificates, Documents and Trainings you can Select the "Close" button at the bottom right of the Screen.

2. Columns
   A. To change the information displayed on your screen Select the "Columns" tab to the right of your screen. Now Select the Columns that you would like displayed on your screen.
      - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**

3. To Create a Filter
   A. Select the Drop-down menu next to the "Filters" button, scroll down and Select the "Create a Filter" button. In the "Manage Filter" Screen, First, Enter a Filter Name. Now, Select all of the appropriate Search Parameters. **You must always select at least one License/Certificate when creating a Filter.**
      - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**

<u>Assets</u>

Select "Assets" from the top Menu

1. To Create a New Asset
    A. First, Select the Asset Type.
    B. Select the "Create" button on the left side of the screen. You are now in the Create Asset screen. Complete the information requested. Be sure to enter all Expiration dates.
        - To Upload a document (Photo, Registration card, Insurance card, …) select the "Browse" button to the right of the screen. Find the correct photo on your computer and then "Double Click" the document.
        - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**

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    A. To change the information displayed on your screen Select the "Columns" tab to the right of your screen. Now Select the Columns that you would like displayed on your screen.
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3. To Create a Filter
    A. Select the Drop-down menu next to the "Filters" button, scroll down and Select the "Create a Filter" button. In the "Manage Filter" Screen, First, Enter a Filter Name. Now, Select all of the appropriate Search Parameters. **You must always select at least one "Date Field" when creating an Asset Filter.**

<u>Reports</u>

Select "Reports" from the top Menu

1. To Create a New Report
    A. Reports are based on Filters that you have created. In order to Create a Report, you must first create a Filter that will generate the required information.
        - Example: In order to create an Expiration Report for Asbestos Certificates, you must first create a Filter that show everyone with an Expired Asbestos Certificate. Next you would create a report using this Filter.

    B. Select the "Create" button on the left side of the screen. You are now in the "Create Report" screen.
        - First, enter a name for the Report.
        - Next, Select the "Object Type". (This is Employees or Assets)
        - Now Select your Filter.
        - Finally, select how often you want to receive the report, the Start date and time and enter who will be receiving the report.
        - At this point you can View the Report or Download the CSV
        - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**

Incidents

Select "Incidents" from the top Menu

1. Select the "Create" button on the left side of the screen. You are now in the Create Incident Screen. Complete all the appropriate information.
   - Select the "Add New" button to the right of the screen. Now select if the Incident involves an employee or an Asset or both. Select the name of the employee or Asset. And now answer the questions under the configure tab.
   - To Add a Photo select the "Browse" button and find the correct photos on your computer and then Double Click the photo.
   - Now, enter the appropriate information in the boxes provided for "Action Taken"
   - **When finished, Select the "SAVE CHANGES" button at the bottom right of the screen.**