

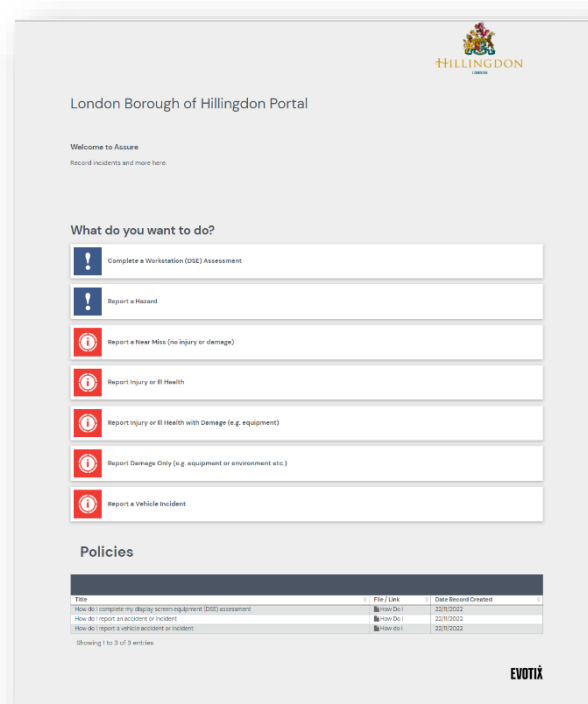
How do I... Use Assure - New Users

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Introduction

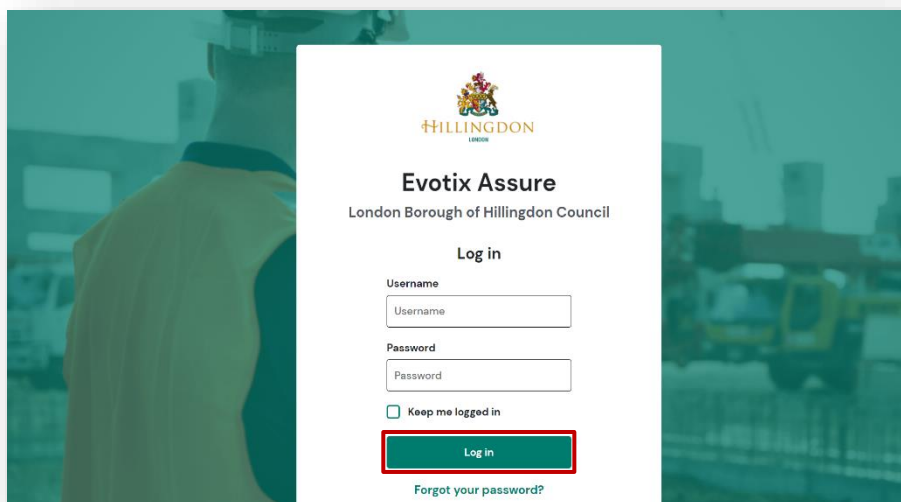
- 1.1. The information below summarises how the Assure online health and safety system works.
- 1.2. The Assure system is used to report hazards, accidents and incidents etc as well as creating and completing DSE assessments and Risk assessments.
- 1.3. Any employee, with access to the Intranet, can report accidents/incidents and complete DSE assessments through the Assure portal.



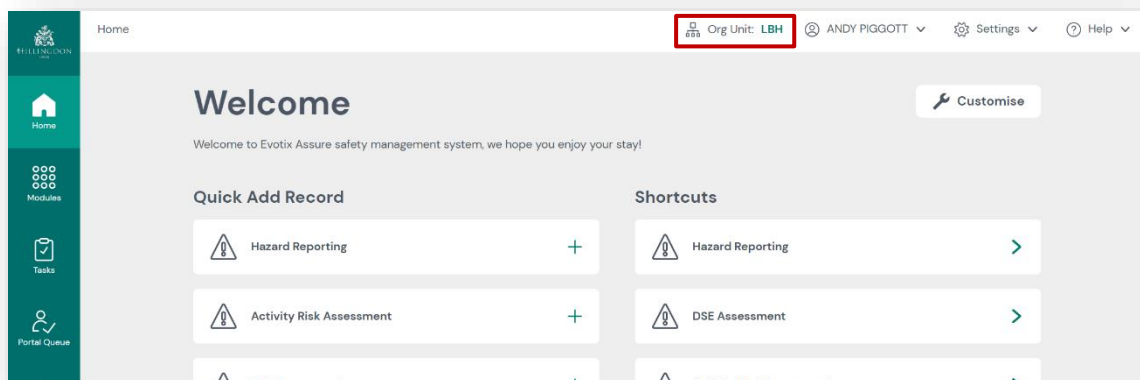
- 1.4. Users have access to the full system which will allow them to complete 1.3. as well as creating risk assessments and view all records within their designated team.
- 1.5. This guide will help you navigate through the system. For further details on creating specific records, refer to the other 'How do I...' guides which can be found on the [Intranet](#).

2. How do I access Assure?

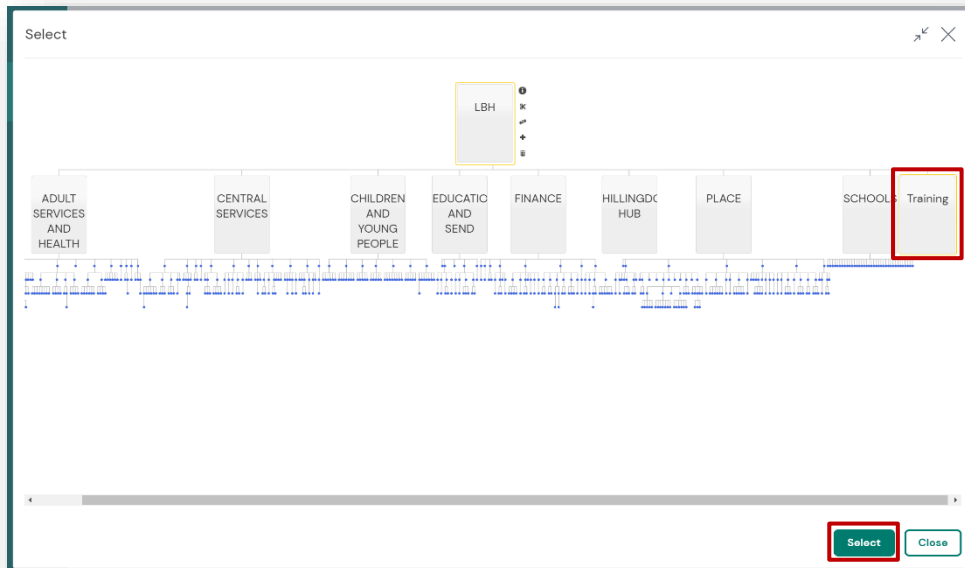
- 2.1. You can access Assure via this [link](#) which can also be found in the health & safety section on the [Intranet](#).
- 2.2. To log in, just enter your username and password into the spaces provided as shown.
- 2.3. Next click **Login**. If the details have been forgotten, you should use the password reset function.



- 2.4. When you log in, check that the Org Unit shown is correct and displays the area or business function you work in.
- 2.5. Org Units represent the health and safety reporting structure within the London Borough of Hillingdon (LBH). It is against these Org Units that records are created.

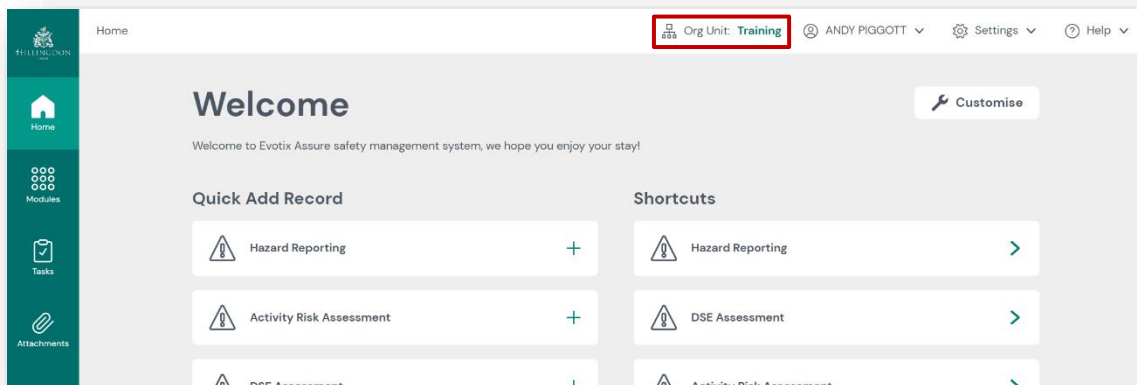


- 2.6. LBH have multiple levels to its reporting hierarchy. This divides out directorates into services and teams. To allow you to view and create records you will need to have the correct Org Unit selected.

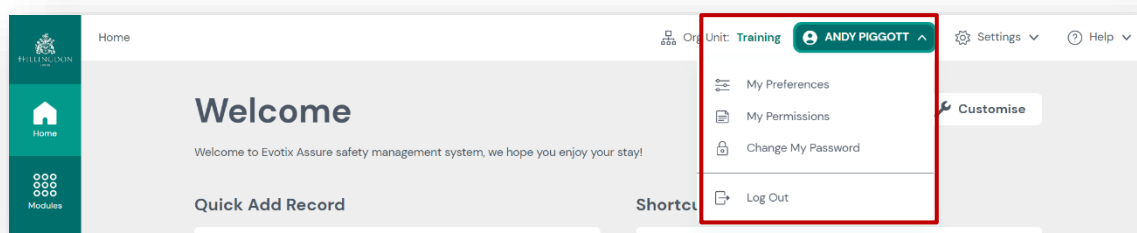


- 2.7. Once you have the correct Org Unit, click **Select**.

- 2.8. You will now see the Org Unit will have changed and all records you view will relate to the new Org Unit chosen.



- 2.9. Clicking on your username will present options that enable you to set your date and time preferences, view your permissions, change your password and log out of the system.



- 2.10. Clicking on Modules displays a list of modules and associated sub modules that your organisation has purchased. Your Assure sub module names may differ from this tutorial as they can be renamed to suit different reporting purposes.

- 2.11. Click **Modules**.

2.12. You can navigate easily to the module/submodule you want from the Modules menu.

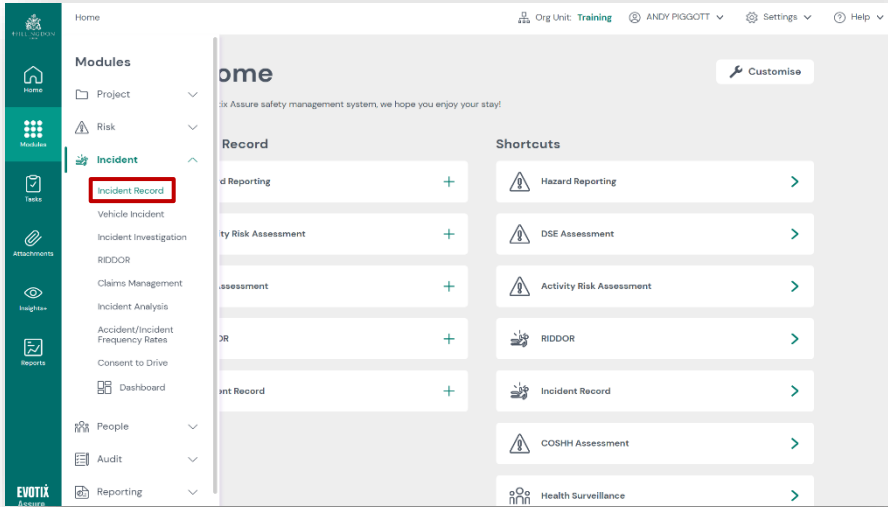
12.1. Modules – Risk – Activity Risk Assessment

12.2. Modules – Risk – COSHH Assessment

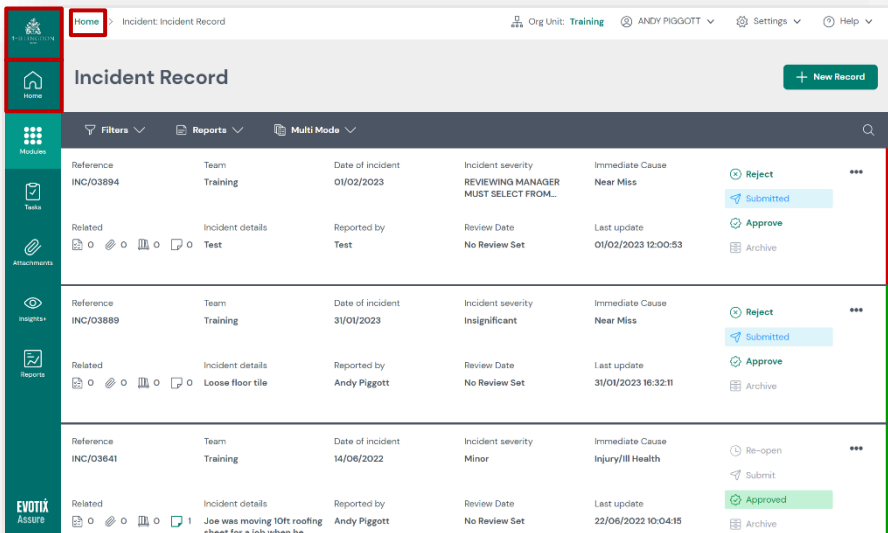
12.3. Modules – Risk – DSE Assessment

12.4. Modules – Incident – Incident Record

12.5. Modules – Incident – Vehicle Incident

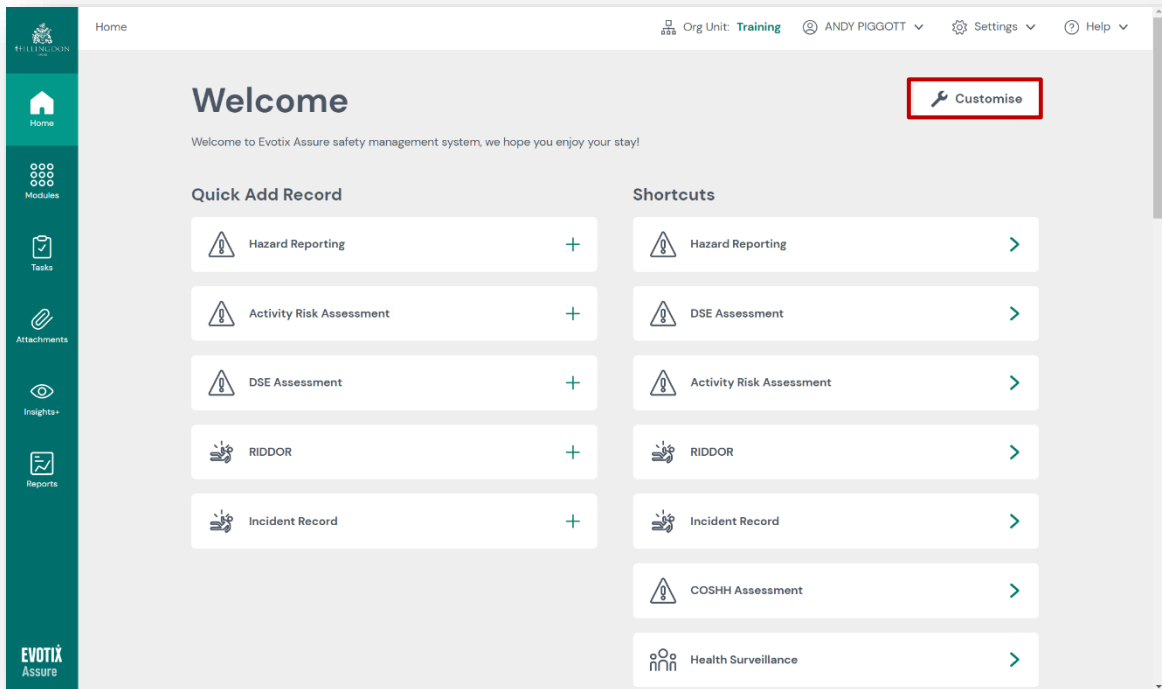


2.13. Clicking on a submodule name takes you to the submodules record list view. Click on the **LBH Logo or Home button** to return to the home screen.

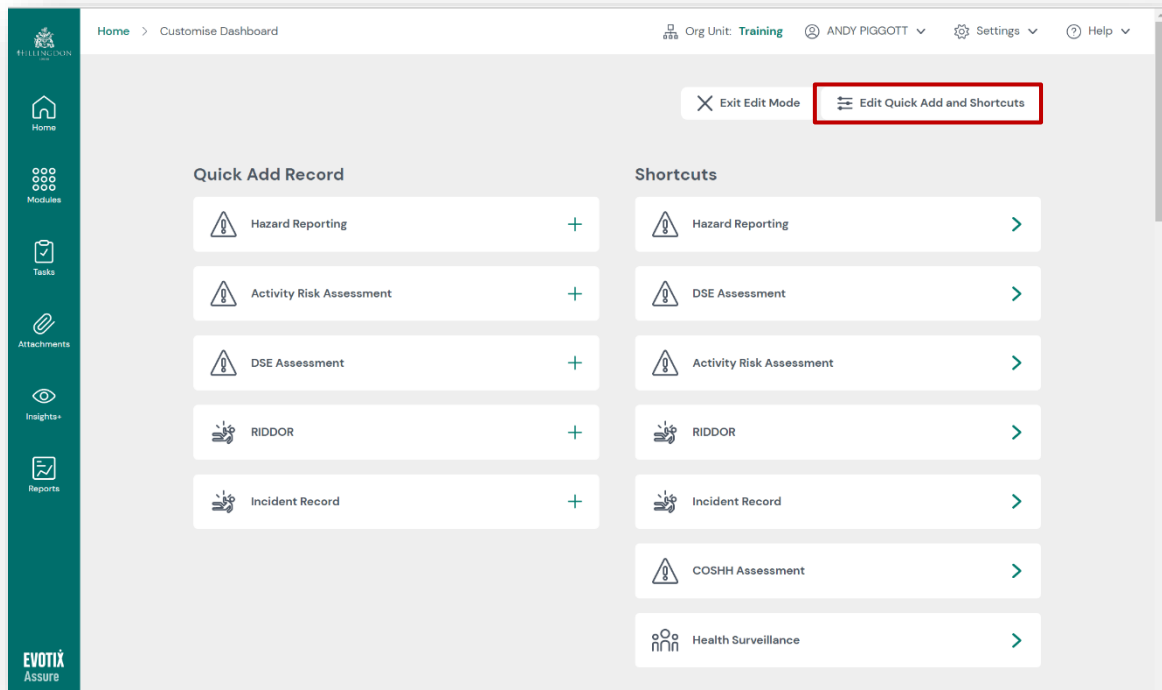


3. Configuring your Dashboard

- 3.1. Assure provides you with the ability to configure your own personal dashboard. Click **Customise**.

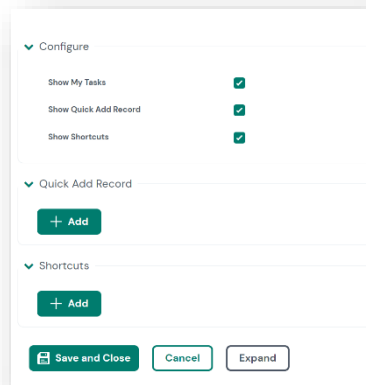


- 3.2. Next, click **Edit Quick Add and Shortcuts**.

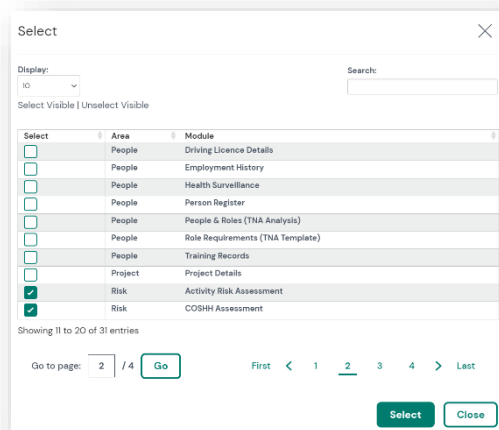


3.3. Selecting Show My Tasks will display a list of your top outstanding tasks.

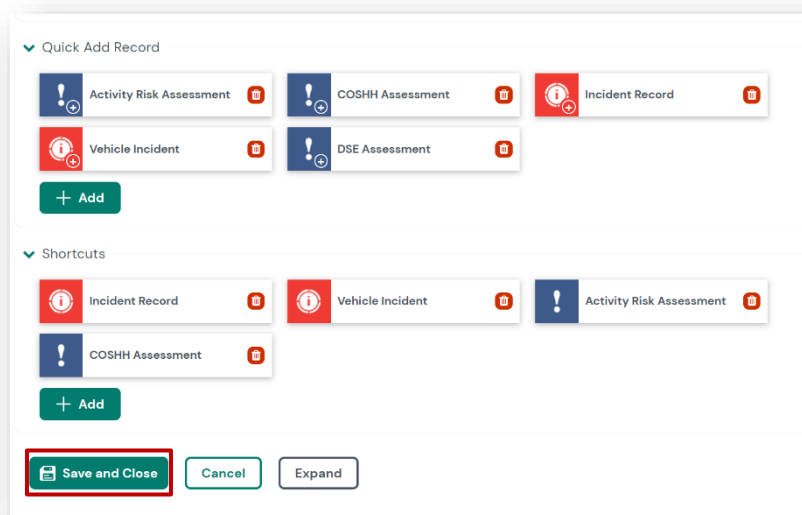
3.4. Selecting Show Quick Add Record and Show Shortcuts allows you to select shortcut icons for your dashboard.



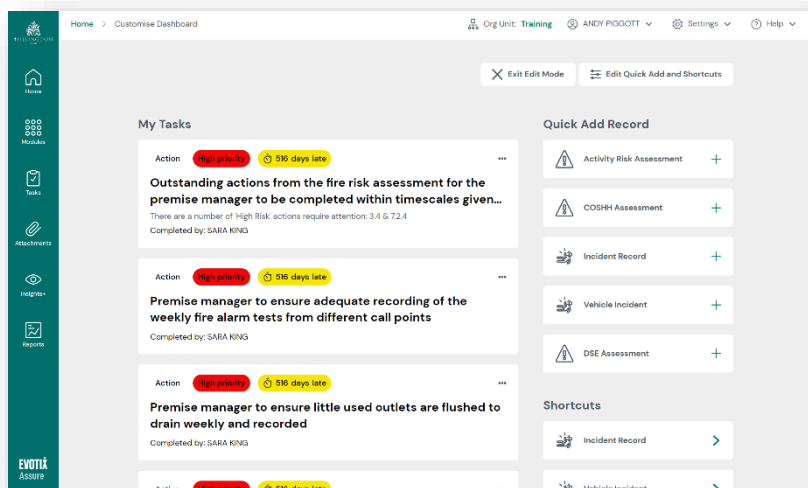
3.5. Click **Add** under Quick Add and/or Shortcuts Record. Select the relevant records you wish to have.



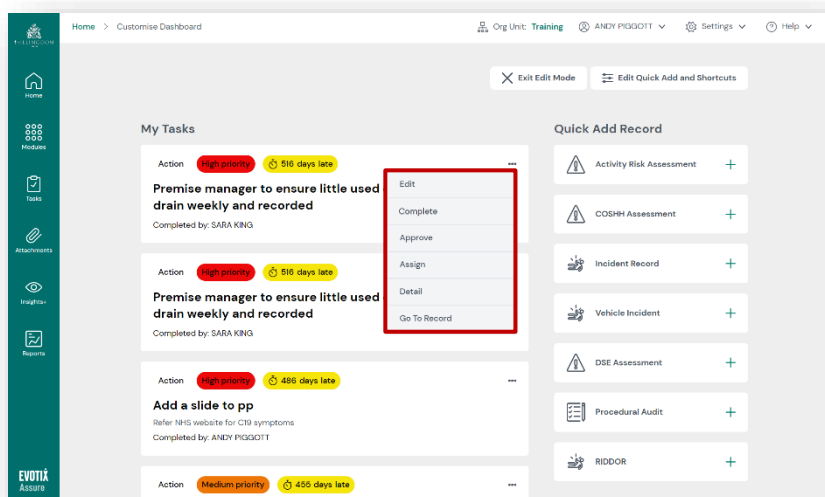
3.6. Finish by clicking **Select**. Once you have selected Quick Add Records and Shortcuts, click **Save and Close**.



3.7. You will now see that quick links and tasks have been added to the dashboard.

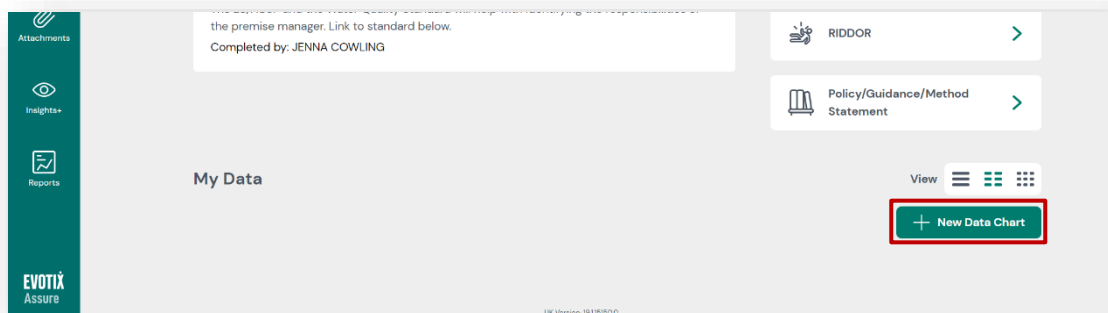


3.8. From your dashboard you can manage the tasks displayed by clicking on the cogwheel next to them.



4. Dashboard Reports

4.1. When in Dashboard configure mode, to add charts to your dashboard, under My Data, click on **New Record**.



Home > Create

Org Unit: LBH ANDY PIGGOTT Settings Help

Dashboard Item

Chart Type* Count Values

Module* Incident Record

Count Field* Approval Stage

Top X Results* 10

Org Group Please select an Org Group...

Use Cascade

Select Filter* Date of Incident - Last 1 Months

Default Layout*

 Text

 Column

 Pie

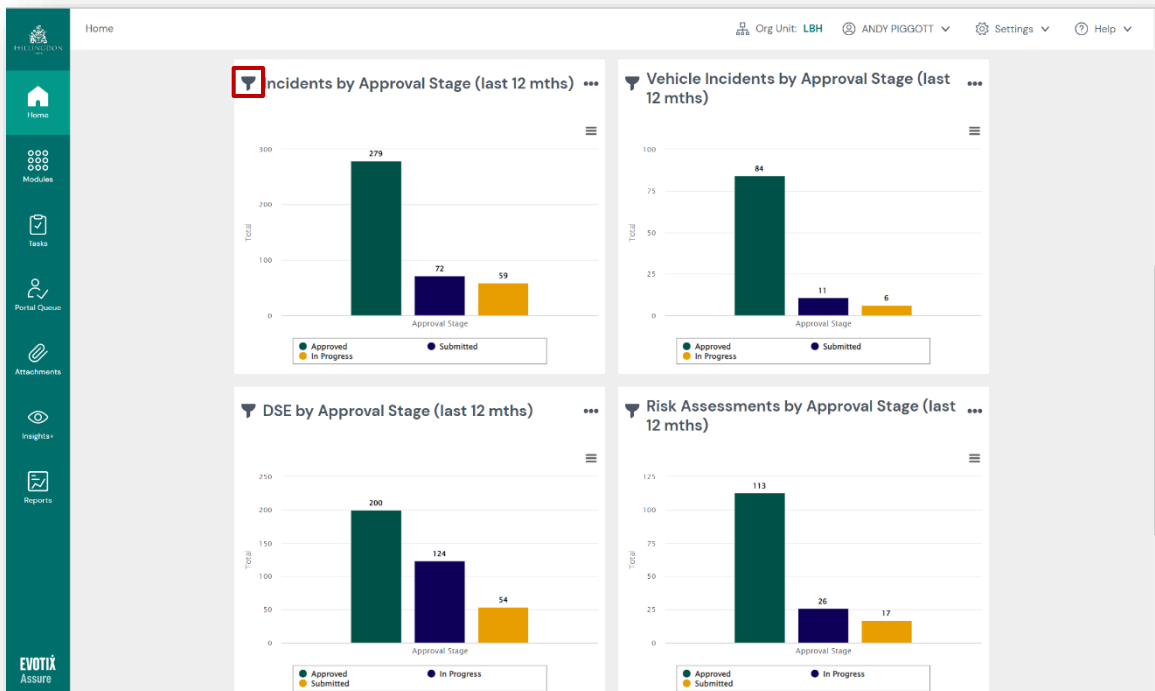
Title Incident Reports

Save and Close Cancel

EVOTIX Assure

4.2. Dashboard reports will show you those records that are in progress (assigned); have been submitted for approval and those that have been approved.

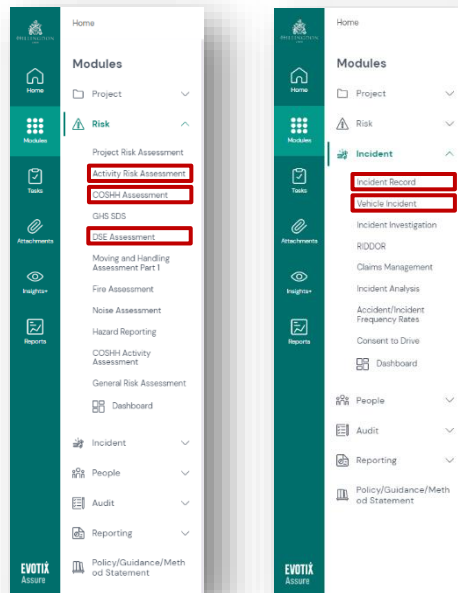
4.3. Clicking onto the symbol to the left of the first word in the dashboard report title will allow you to view the summaries of the associated individual records.



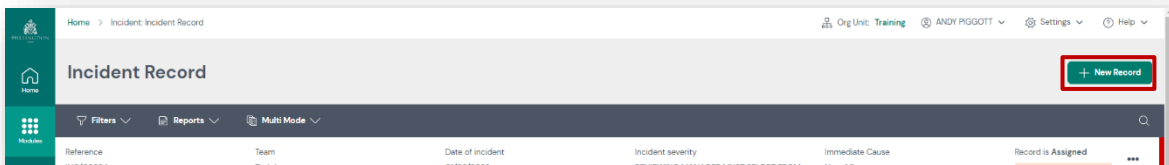
5. Submodules

5.1. Select the module and submodule you wish to view. The council predominantly use the Assure system for reporting accidents, completing DSE, COSHH and Activity Risk assessments:

- 5.1.1. Modules >>> Risk >>> Activity Risk Assessment
- 5.1.2. Modules >>> Risk >>> COSHH Assessment
- 5.1.3. Modules >>> Risk >>> DSE Assessment
- 5.1.4. Modules >>> Incident >>> Incident Record
- 5.1.5. Modules >>> Incident >>> Vehicle Record



5.2. When working in any module, to start a new record just click on the **New Record** button.

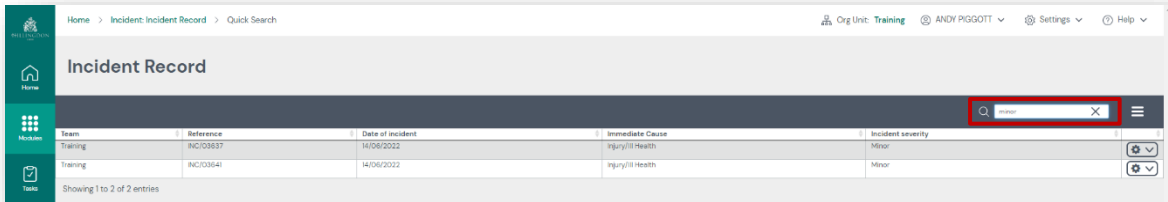


5.3. A new form for the subject you are working in will open. Any fields you see with a red asterisk are mandatory. For further details on completing records, please refer to the 'How do I..' guides which can be found within [Health & Safety documents](#) on the Intranet.

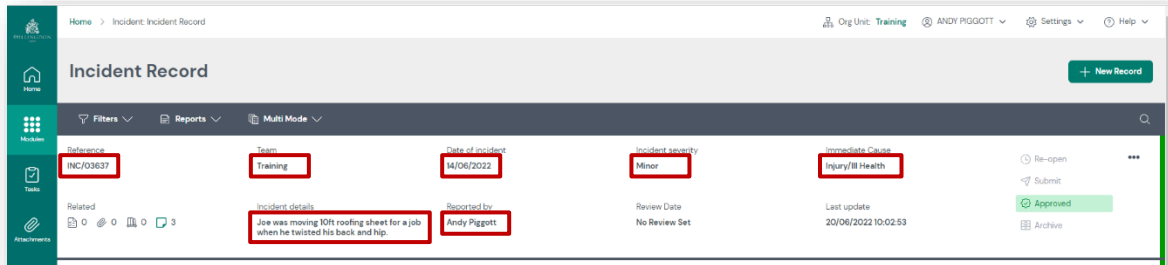
5.4. When working in a module, a Quick Search function is provided to help you find specific records and information. Click on the **Magnifying Glass**



5.5. Use the search box provided to search the available columns.



5.6. To work with existing records, for example to edit incident records with investigation findings, just click on any of the record's text to open it in Edit mode.



5.7. Records in Assure can go through different stages of Workflow Approval.

5.8. Record Assigned - When the icon looks like this, the record has been Assigned to a specific user to manage. For example a record may be Assigned to a manager so they can conduct an Incident Investigation.



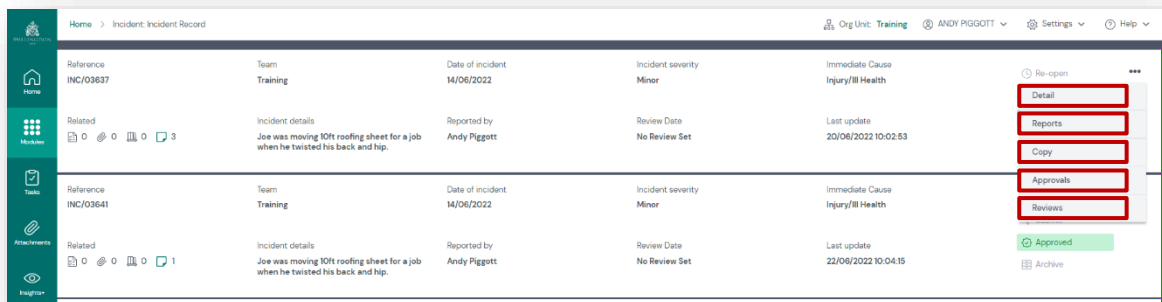
5.9. Record Submitted - When the record says Submitted, it means that it has been submitted for approval. It cannot be worked on further when it is in the submission stage.

Reference	Team	Date of incident	Incident severity	Immediate Cause	Actions
INC/O3637	Training	14/06/2022	Minor	Injury/Ill Health	Re-open, Submit, Approved, Archive
INC/O3641	Training	14/06/2022	Minor	Injury/Ill Health	Re-open, Submit, Approved, Archive
INC/O3889	Training	31/01/2023	Insignificant	Near Miss	Re-open, Submitted, Approved, Archive
INC/O3894	Training	01/02/2023	REVIEWING MANAGER MUST SELECT FROM OPTIONS BELOW	Near Miss	Record is Assigned, Rejected, Submit, Approve, Archive

5.10. Record Approved - When a record is showing a green tick, it means that it has been Approved.

Reference	Team	Date of incident	Incident severity	Immediate Cause	Actions
INC/O3637	Training	14/06/2022	Minor	Injury/Ill Health	Re-open, Submit, Approved, Archive
INC/O3641	Training	14/06/2022	Minor	Injury/Ill Health	Re-open, Submitted, Approved, Archive
INC/O3889	Training	31/01/2023	Insignificant	Near Miss	Re-open, Submitted, Approved, Archive
INC/O3894	Training	01/02/2023	REVIEWING MANAGER MUST SELECT FROM OPTIONS BELOW	Near Miss	Record is Assigned, Rejected, Submit, Approve, Archive

- 5.11.** Clicking on the options menu next to a record will open the manage record options.
- 5.11.1.** Details – Opens the record to view the information, it cannot be edited
 - 5.11.2.** Reports - Opens the record in a printable format and allows the record to be saved in different file formats.
 - 5.11.3.** Copy - Creates a new record with a separate reference and copies across all the detail from the original. This can save time when creating multiple records of a similar type. When using the copy function, be sure to remove any unwanted copied data.
 - 5.11.4.** Approvals - takes the user to the Approvals log to see the different stages of workflow approval the record has been through and who has been involved at each stage
 - 5.11.5.** Reviews - Enables the user to add review date or edit an existing one depending on their user permissions



6. Emails from the system

- 6.1.** Emails received with the subject title 'Incident Reported Via Assure'. This will inform you when a record has been created and brief details of the record. The link within the email, will direct you to that record to view the full details.
- 6.2.** Emails received with the subject title 'Assure (Health & Safety System) Overdue Submission Reminder': This means either you or one of your direct reports has not 'submitted' a record for approval within the required timescale. The purpose of the email is for you to give that manager a gentle reminder in order to progress the record appropriately or submit the record yourself.
- 6.3.** Emails received with the subject title 'Assure (Health & Safety System) Overdue Action Reminder' means the same as above regarding 'actions' generated within the system.
- 6.4.** Emails received with the subject title 'Assure (Health & Safety System) Approval Notification': This will typically mean that a record has been 'submitted' to you for 'approval'. You will now need to take the relevant steps to 'approve' the record. NB: Emails with this subject title could also mean that some of the details regarding the submission status within the record have changed.

7. What happens next?

- 7.1. If you have any queries regarding Assure, you should discuss them with your line manager in the first instance. If you require further assistance contact Health and Safety Services on healthandsafetyadvisory@hillingdon.gov.uk.