State of New Jersey
Schools Development Authority

Section 15

Safety

Oracle Primavera

Table of Contents

I. Safety Overview

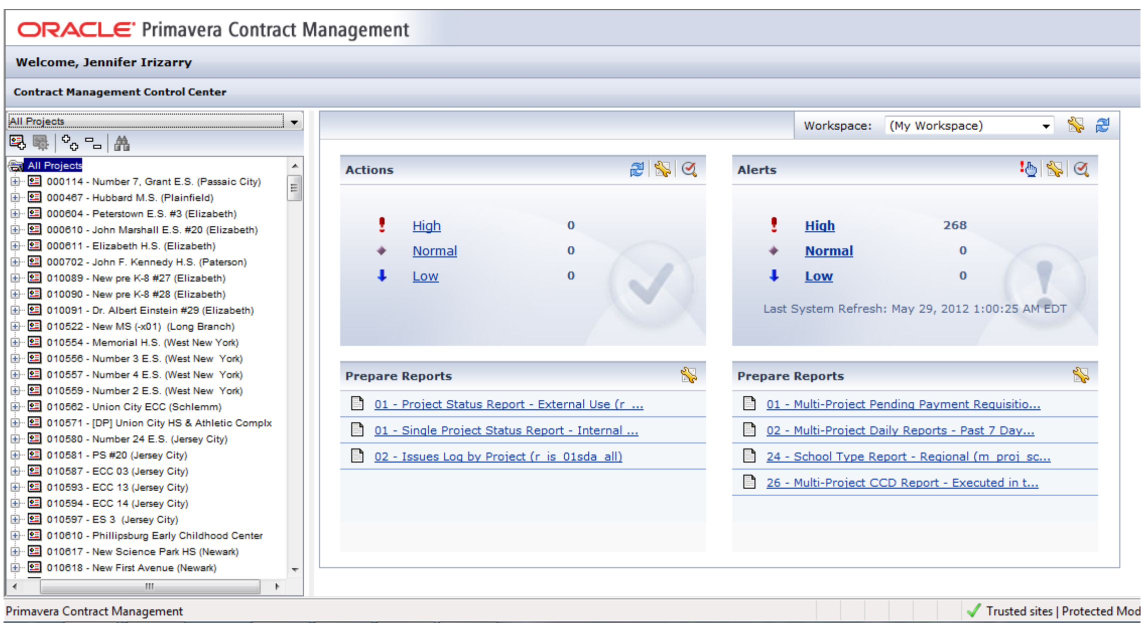
Recording violations and injuries on the job site is critical for conforming to OSHA regulations. The Contract Management Safety module enables you to track three types of safety documents:

- **Injury or Illness Reports:** These reports will be completed each time there is an accident, injury or illness at a site.
- **Safety Violations**: You can create and print out a report to inform a vendor of a potential hazard or violation.
- **Safety Audit Report**: You can create a document to track safety audit information.

Additionally, information entered in the SDA's Safety team database is uploaded into Contract Management. These summary reports include checklists, daily and weekly reports.

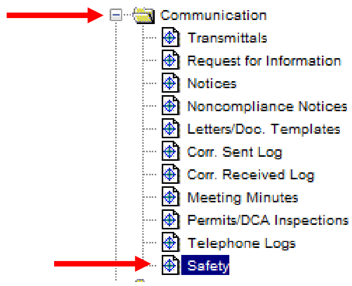
II. Create a Safety Document

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).

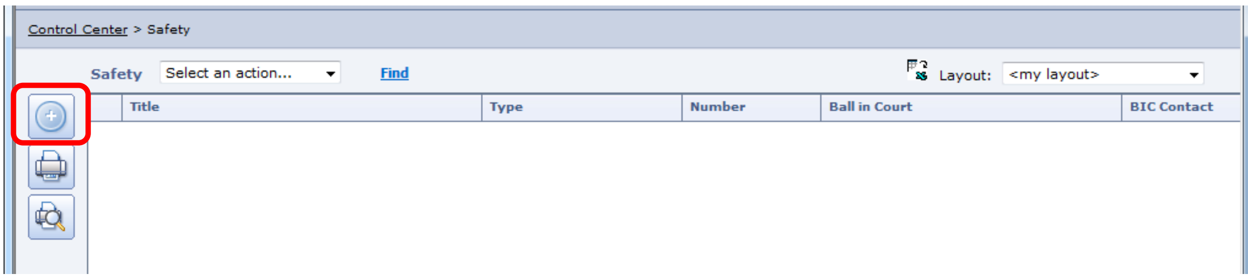


2. Select your desired project.

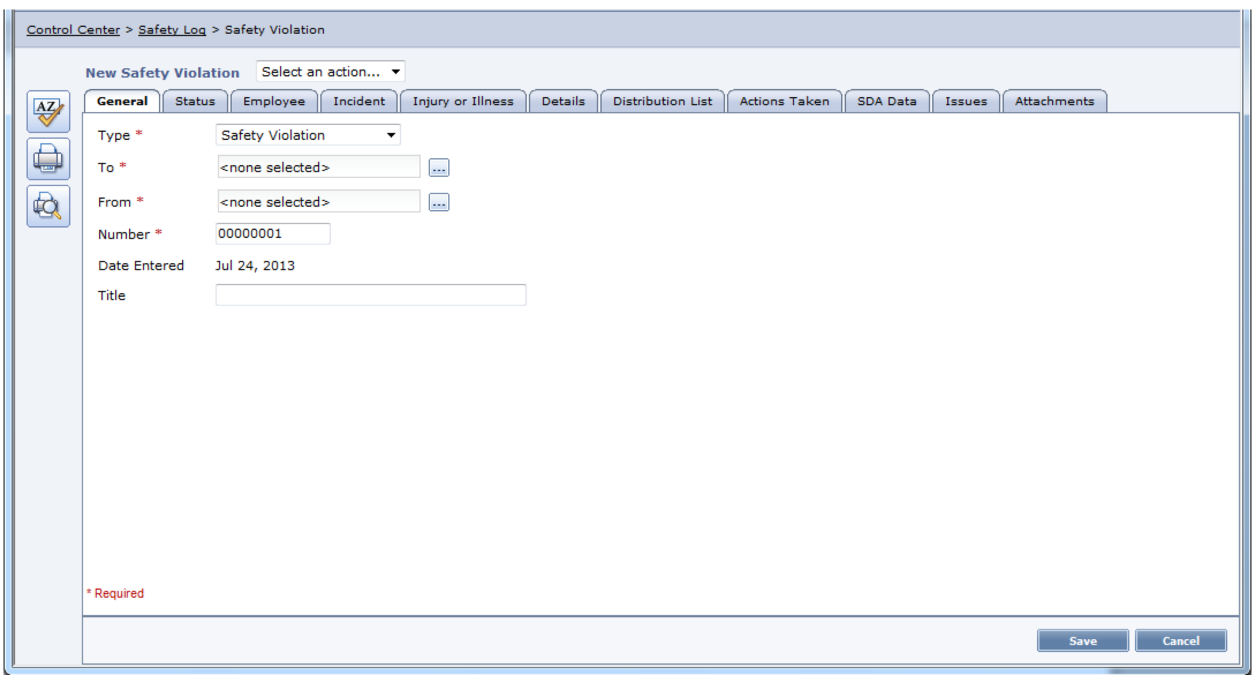
3. Open the **Communication** folder (a list of modules will display) and select **Safety**.



4. The **Safety log view** displays. Click the **Add Document** button to add a new document.



5. The **Safety document** displays. It is divided into several sections.

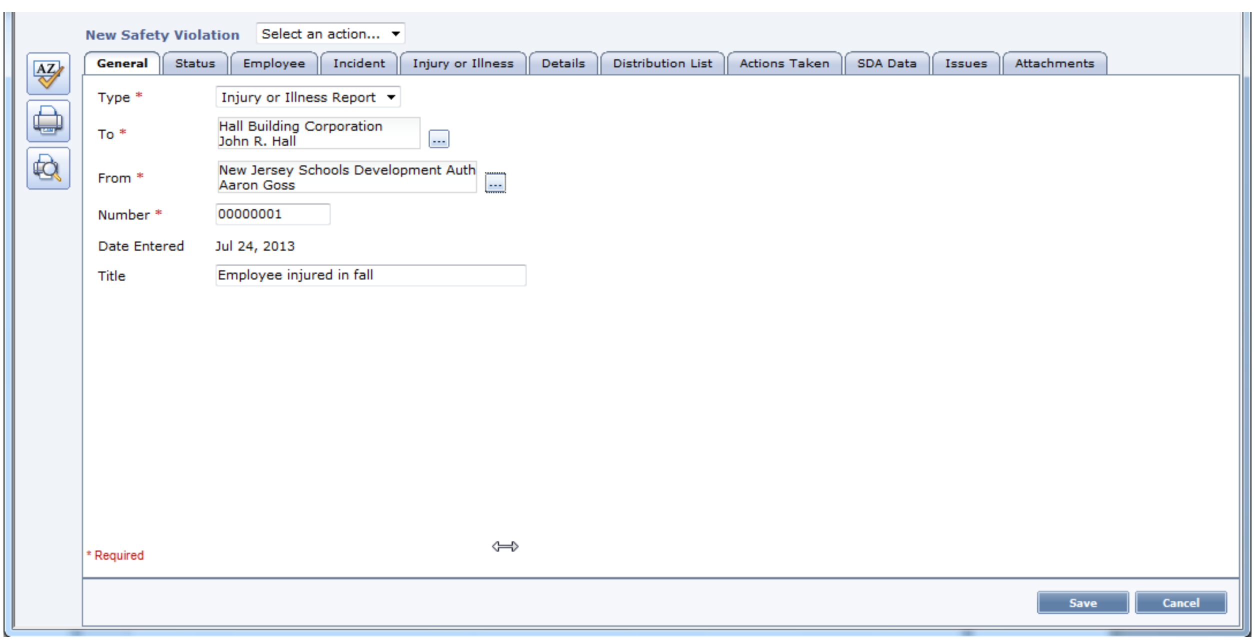


A. General tab

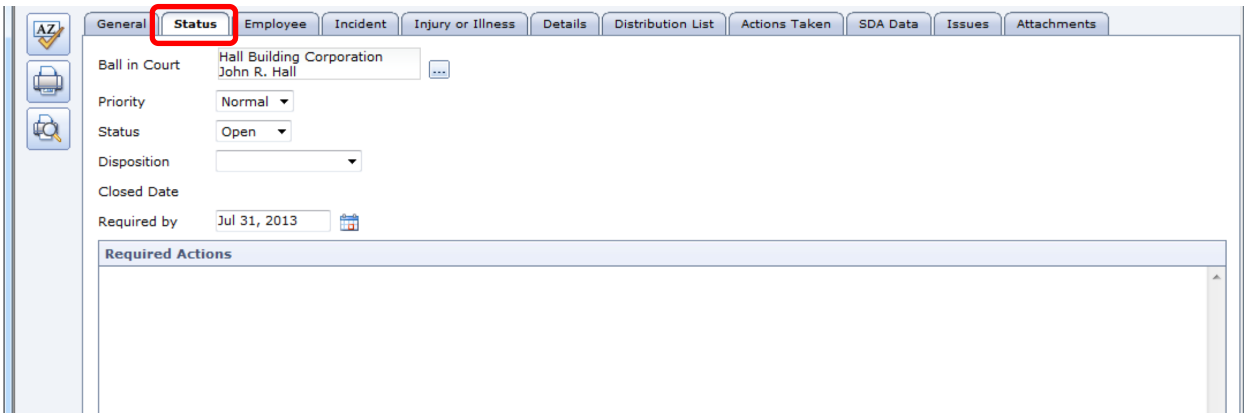
- **Type –** Click the **drop-down arrow** and select the report type. Choose either Injury or Illness Report or Safety Violation. This is a required field.

  Note: If you select Injury or Illness report, the document header will still display Safety Violation. Once the document is saved, the Safety Violation title in the heading section will change to Injury or Illness report.
- **To –** Click the **select** link next to the field to choose the Company name with the injured employee from the contact list. This is a required field.
- **From –** Click the **select** link next to the field to choose the CM or NJSDA contact from the contact list. This is a required field.
- **Number –** Contract Management will automatically sequentially number the document. Do not change this number. This is a required field.
- **Date Entered –** Contract Management will automatically enter the date you created the document. This cannot be changed.
- **Title –** Enter a brief description of the incident (35 character field).

An example of a completed section is shown.

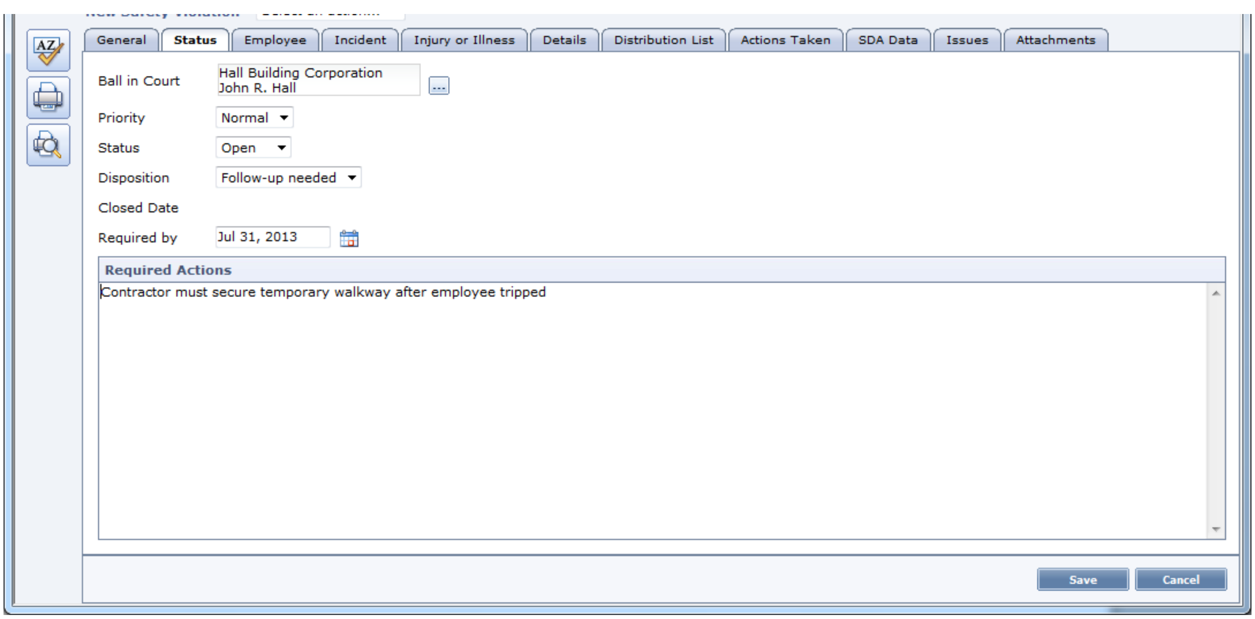


B. Status Tab

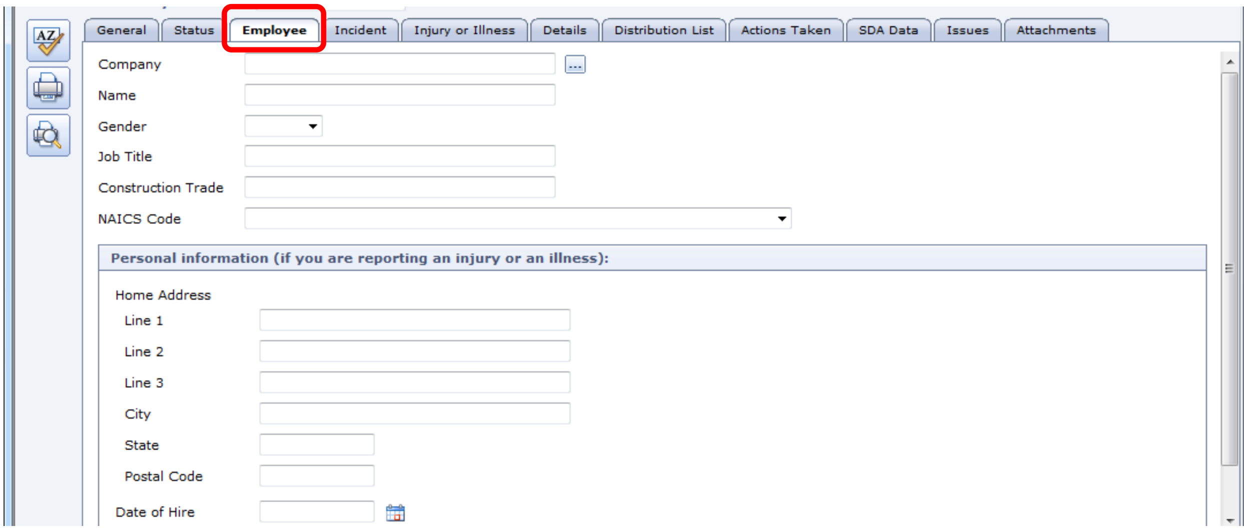


- **Ball in Court –** Defaults to the person who was selected in the To field. If this is incorrect, click the **select** link next to the field to choose the name from the contact list.
- **Priority –** Defaults to **Normal**, but can be changed to **High** or **Low** if needed.
- **Status –** Defaults to **Open**. Change the status to Closed once a resolution is reached.
- **Disposition –** Click the **drop-down arrow** to choose a disposition. Choices include Duplicate, Follow-up Needed, Resolved or Unfounded.
- **Closed Date –** Contract Management will automatically complete this date when the status is set to closed.
- **Required by –** Defaults to seven days from the document date. If this is incorrect, click the **calendar icon** to choose another date.
- **Required Actions –** Enter any actions required to resolve the issue. Any future changes to this field will automatically place a copy of the original text in the Actions Taken section of this document.

An example of a completed Status section is shown:

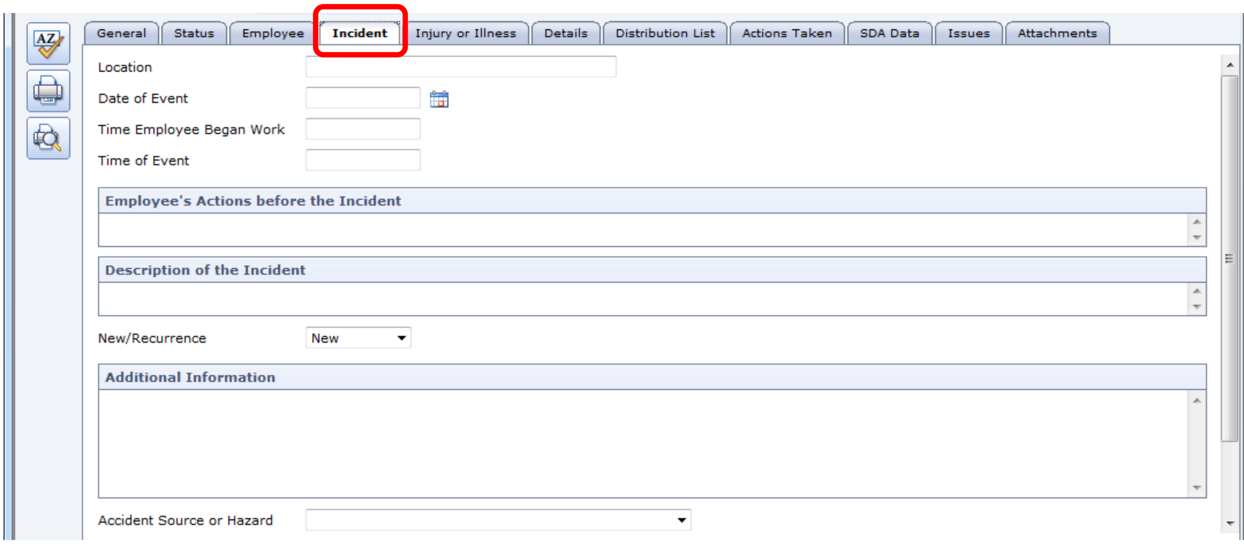


C. Employee Tab



- **Company –** Click the **select** link next to the field to select the company name.
- **Name –** Enter the employee's name (22 character field).
  Note: If you select the company name using the select button, a default name will display in this field. The name can be retyped if it is not correct.
- **Gender –** Click the **drop down arrow** to choose the employee's gender.
- **Job Title –** Enter the employee's job title (22 character field).
  Note: If you select the company name using the select button, a default title will display in this field. The title can be retyped if it is not correct.
- **Construction Trade –** Enter the employee's construction trade (35 character field).
- **NAICS Code –** Click the **drop down arrow** to choose the employee's NAICS code.
- **Home Address –** Enter the employee's home address in the fields provided (Lines 1, 2 and 3 are 36 character fields; City is a 28 character field; State is a 20 character field; Postal Code is a 15 character field).
- **Date of Hire –** Click the **calendar icon** to choose the employee's date of hire.
- **Date of Birth –** Click the **calendar icon** to choose the employee's date of birth.

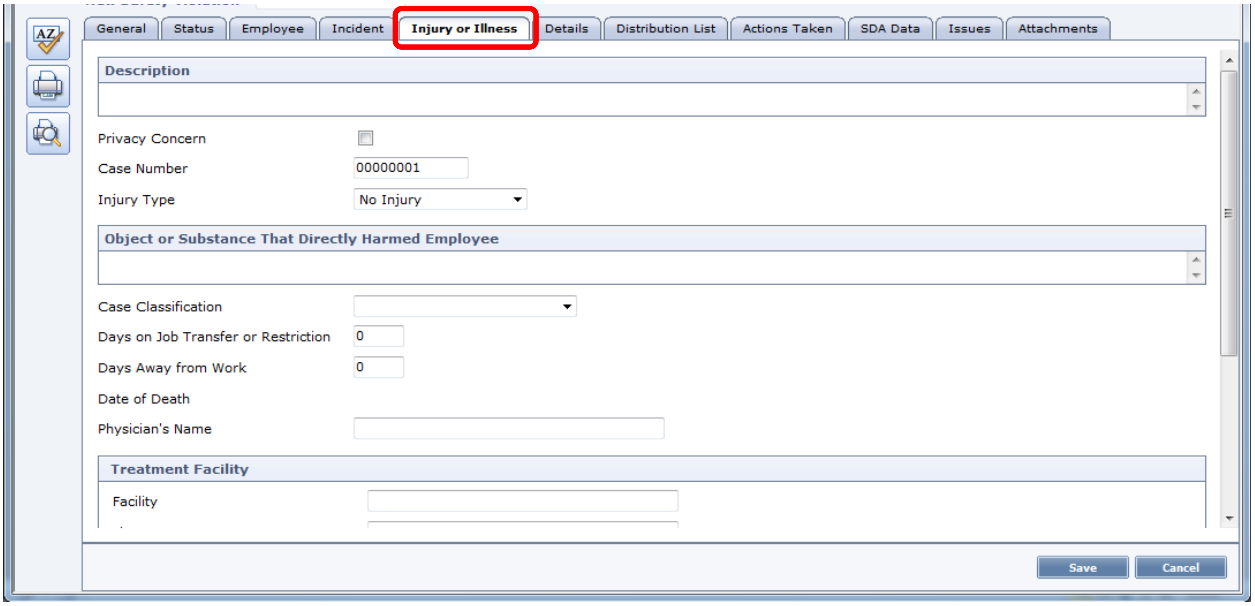
D. Incident Tab



- **Location –** Enter the location of where the incident took place (35 character field).
- **Date of event –** Click the **calendar icon** to choose the date of the incident.
- **Time Employee Began Work –** Enter the start time for the employee (8 character field).
- **Time of Event –** Enter the time the incident occurred (8 character field).
- **Employee's Action's before the Incident –** Enter the employees' actions prior to the incident (80 character field).
- **Description of the Incident –** Enter a description of the incident that caused the injury or illness/violation (80 character field).
- **New/Recurrence –** Click the **drop-down arrow** to choose either **New** or **Recurrence** from the list.
- **Additional Information –** Enter any additional comments about the incident (4000 character field).
- **Accident Source or Hazard –** Click the **drop-down arrow** to choose an option from the list.
- **Safety Violations –** If you are entering an Injury or Illness report and there were any safety violations entered about this incident, click the **select** button next to the field to choose the appropriate violation.

An example of a completed Incident section is shown:

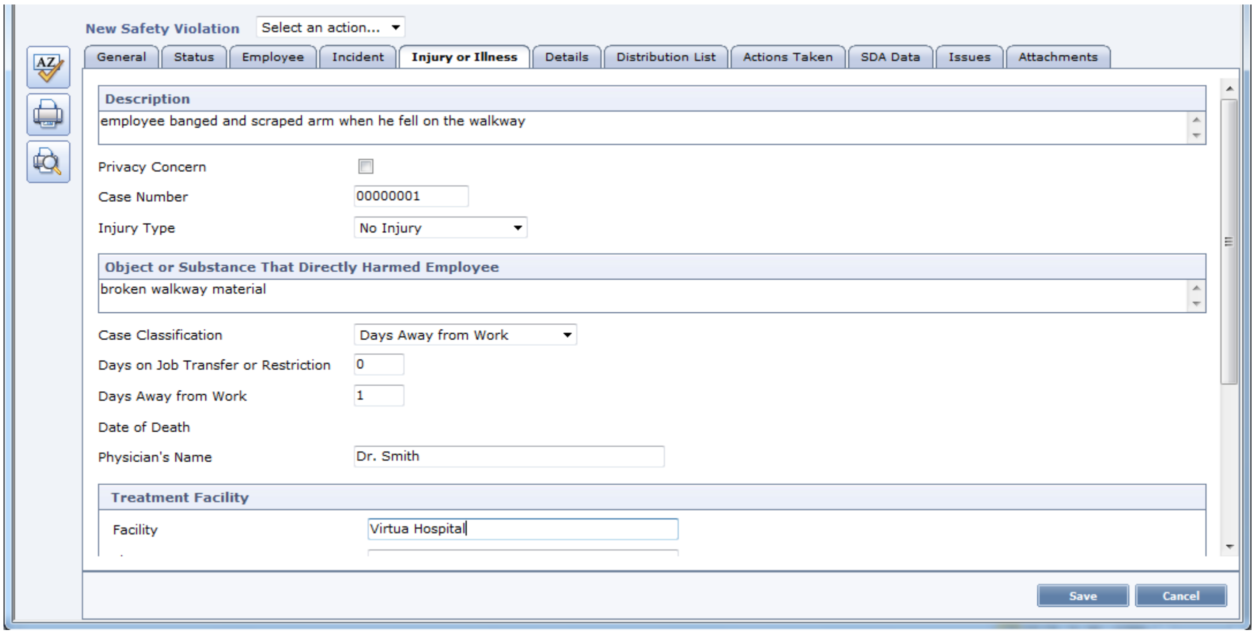
E. Injury or Illness Tab



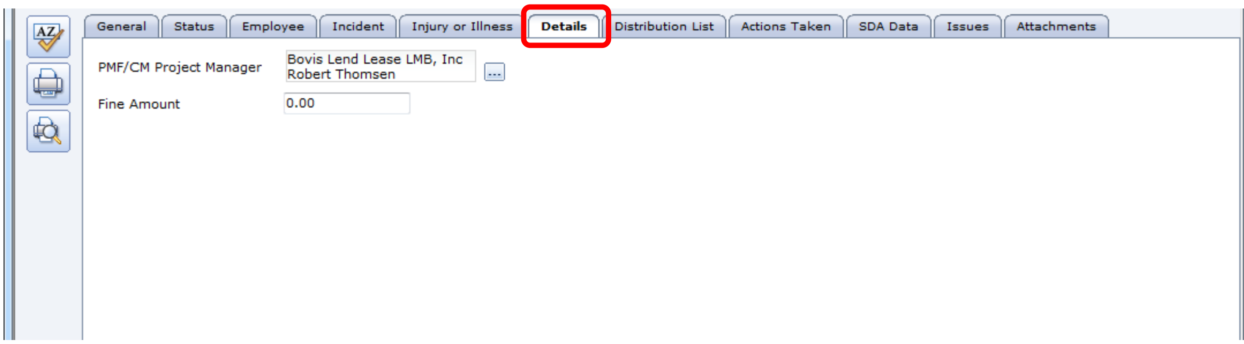
- **Description –** Enter the description of the injury or illness (80 character field).
- **Privacy Concern –** Click the **checkbox** if there is a privacy concern involved with the incident. Checking this prevents the employee's name from printing on any reports.
- **Case Number –** Contract Management automatically enters a case number for this incident. This can be changed if desired (8 character field). Note: this field will only be auto-populated if an Injury and Illness Report has been selected.
- **Injury Type –** Click the **drop-down arrow** to select the type of injury or illness.
- **Object or Substance that Directly Harmed Employee –**Enter the source of the incident (80 character field).
- **Case Classification –** Click the **drop-down menu** to choose a classification of time away from work. Note: if Death is selected, the Date of Death field will be activated.
- **Days on Job Transfer or Restriction –** Enter the number of days on transfer or restriction for the employee's field of work as a result of the incident (5 character field).
- **Days Away from Work –** Enter the number of days the employee was away from work as a result of the incident (5 character field).
- **Date of Death –** If the case classification is Death, click the **calendar icon** to select the date of death. Note: this field will only become active if death is chosen as the case classification.
- **Physician's Name –** Enter the name of the physician treating the employee (22 character field).
- **Treatment Facility –** If the employee went to a treatment facility due to the incident, enter the facility's information in the fields provided (Facility is a 36 character field; Lines 1, 2 and 3 are 36 character fields; City is a 28 character field; State is a 20 character field; Postal Code is a 15 character field).
- **Treated in Emergency Room –** Click the **checkbox** if the employee was treated in an emergency room.

- **Hospitalized Overnight –** Click the **checkbox** if the employee was admitted to a hospital overnight.

An example of a completed Injury or Illness section is shown:

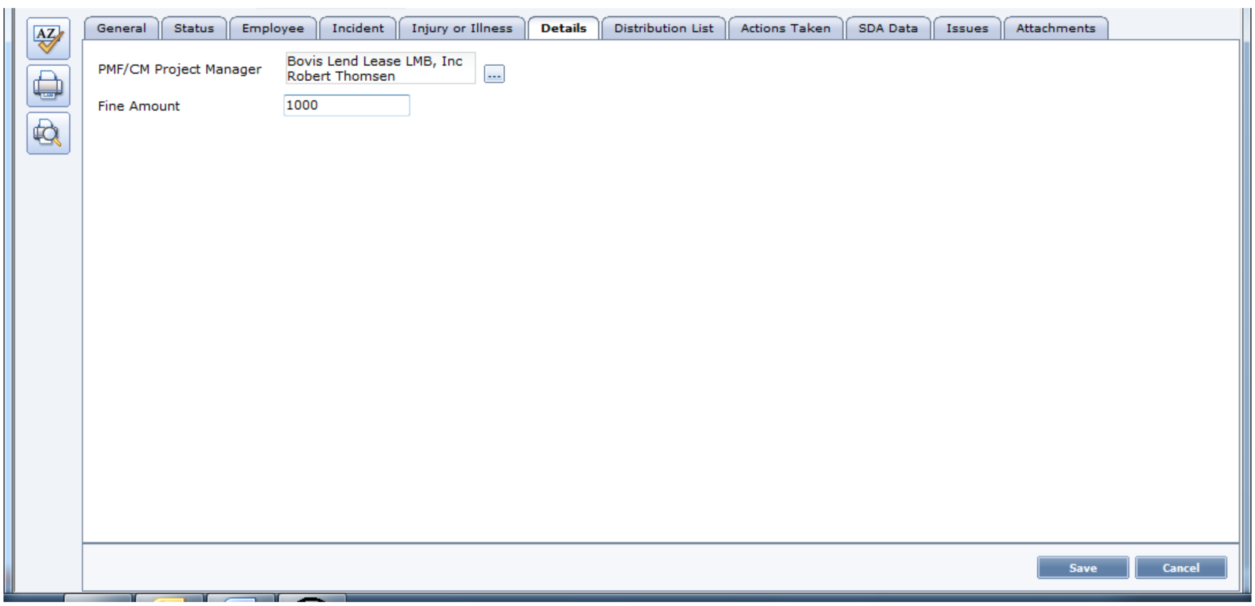


F. Details Tab

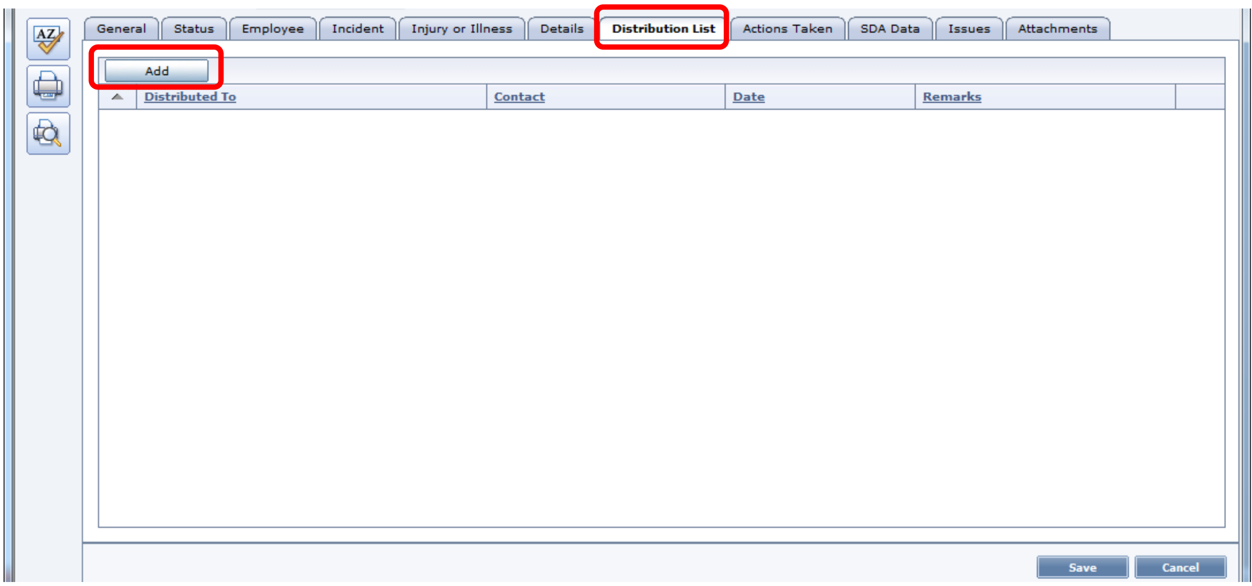


- **PMF/CM Project Manager –** Defaults to the PMF/CM name set at the project level. If this is incorrect, click the **select** link on the right side of the page to choose a new name from the contact list.
- **Fine Amount –** Enter the amount if a fine was levied against the violating company (20 character field). Note: the amount should be entered without any formatting.

An example of a completed Details section is shown:

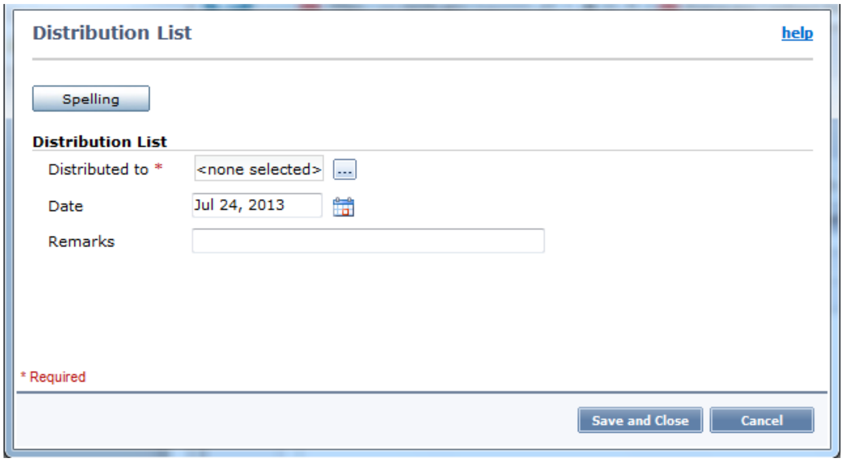


G. Distribution List Tab



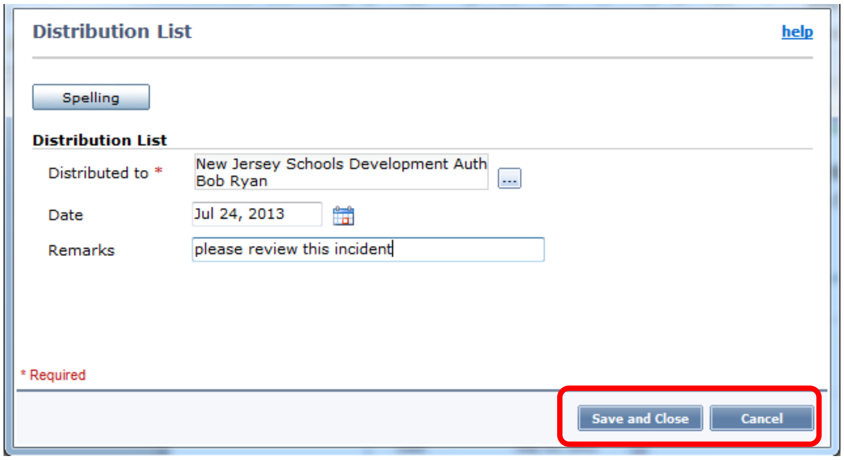
If there are others who should receive a copy of the injury or illness report, click the **Add** button.

The **Distribution List dialog box** will display. Complete the following fields:

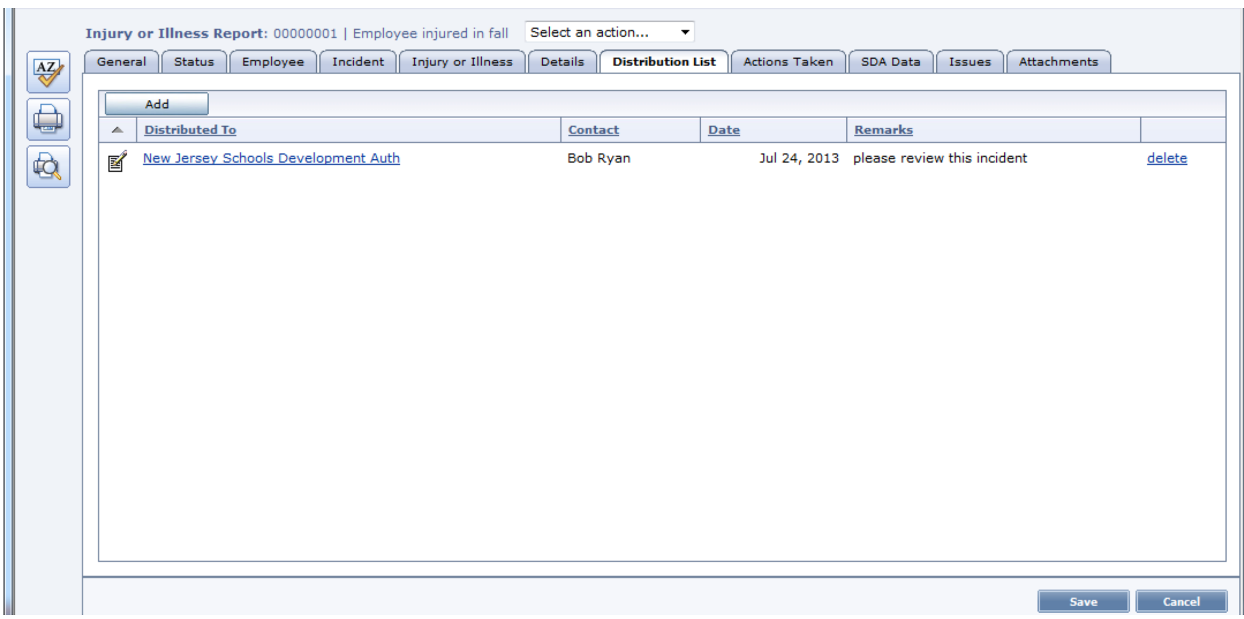


- **Distributed to –** Click the **select** button next to the field to choose a name from the contact list. This is a required field.
- **Date –** Will default to the current date. If this is incorrect, click the **calendar icon** to choose another date.
- **Remarks –** Enter any comments or special directions regarding the incident (39 character field).

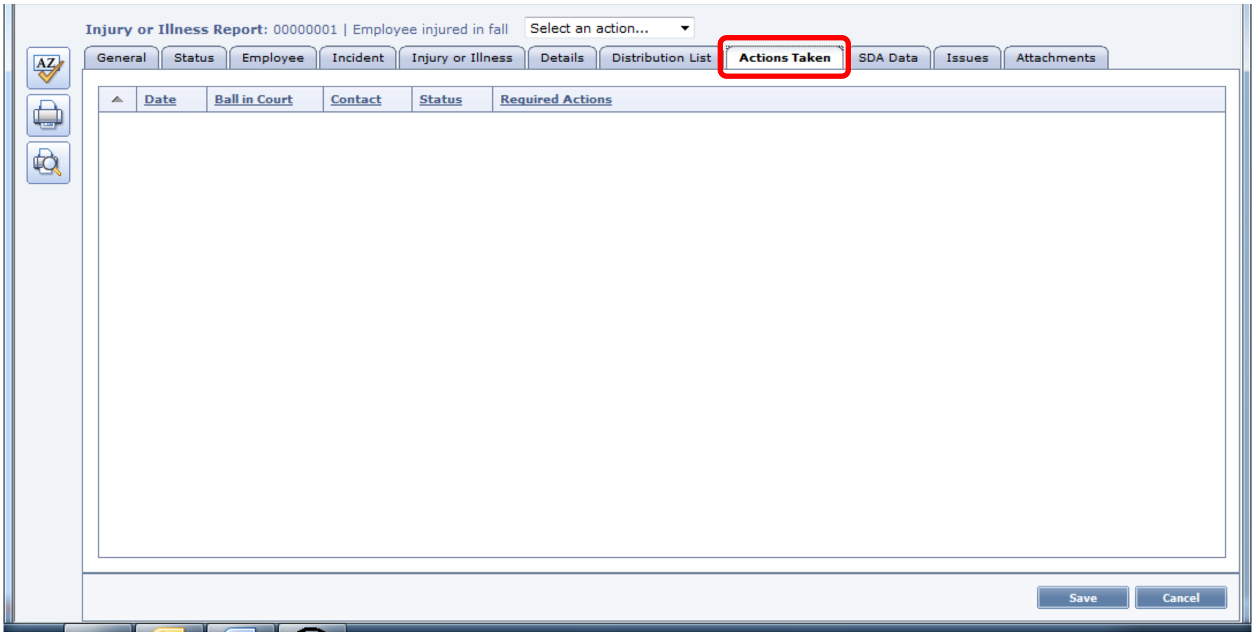
An example of a completed Distribution List item is shown. When completed, click the **Save & Add Another** button to add additional names to the distribution list, or the **Save & Close** button to return to the Safety document.



An example of a completed Distribution List section is shown:

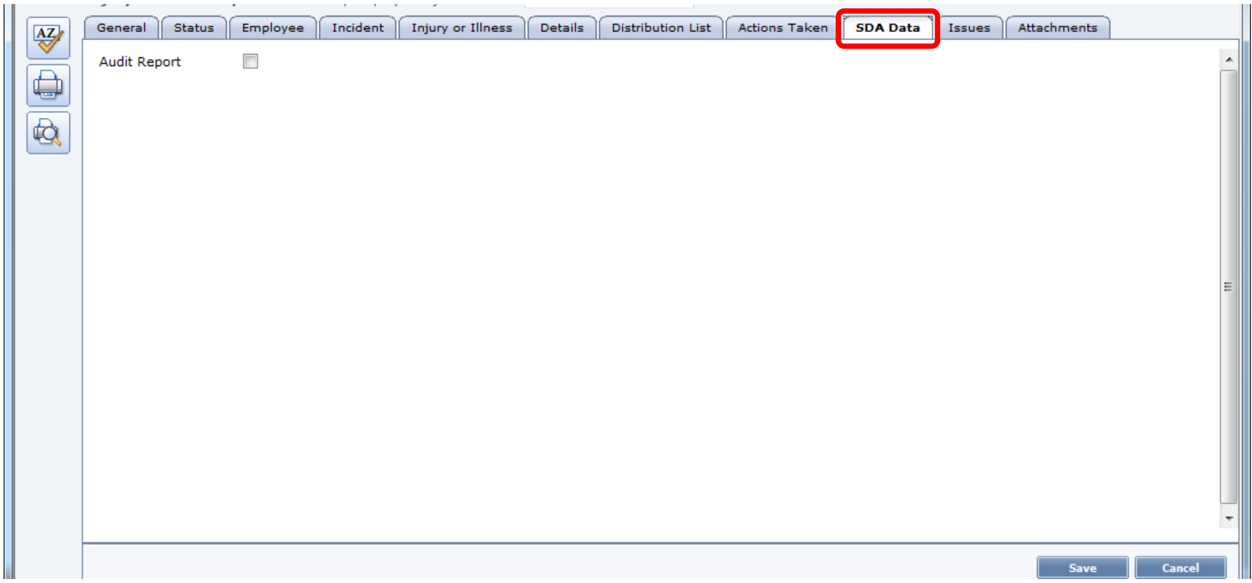


H. Actions Taken Tab



This section is not editable. Contract Management will automatically update this section any time any changes are made to fields that correspond to columns in this section. Once the document is saved, an entry will be placed in the Actions Taken Section. These entries cannot be changed once they are listed in this section.

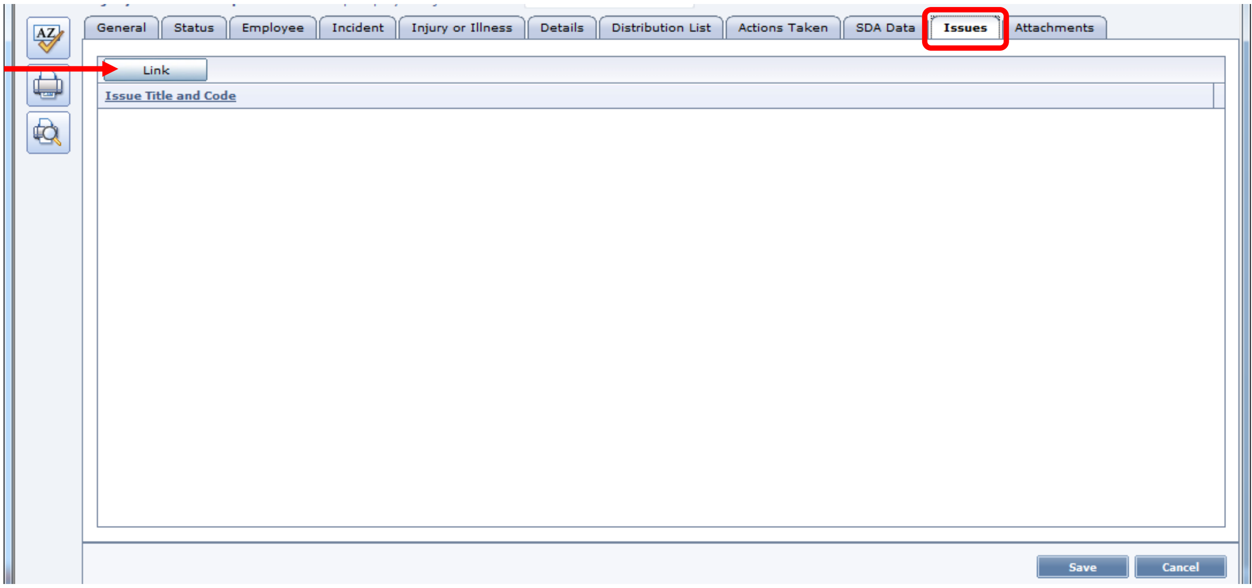
I. SDA Data Tab



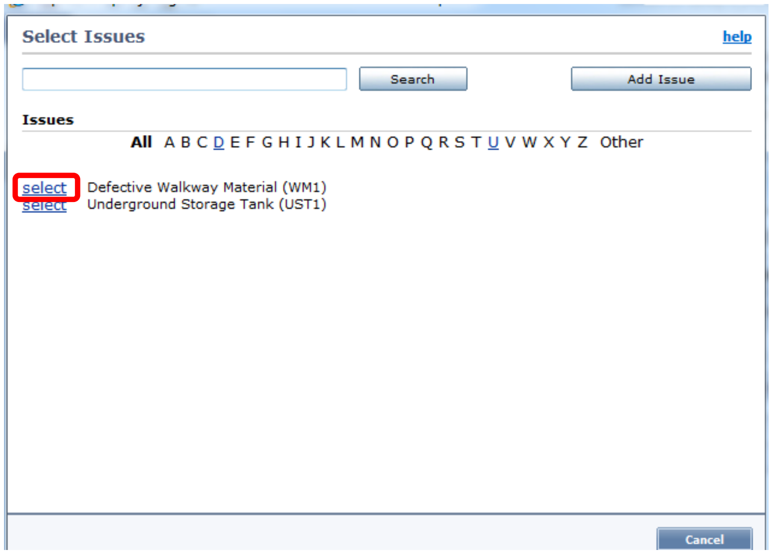
If this document is being created for audit report purposes, click the **Audit Report checkbox**.

J. Issues Tab

If this incident relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button and choose the desired issue from the dialog box.



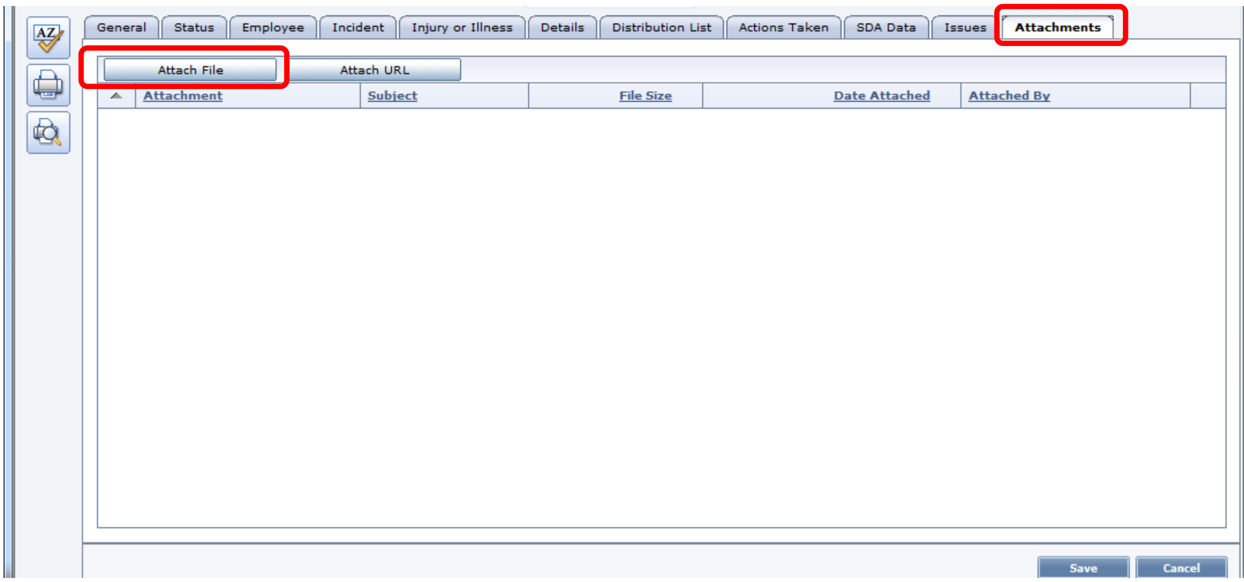
The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the letter. Once you click the select link, you will return to the document.



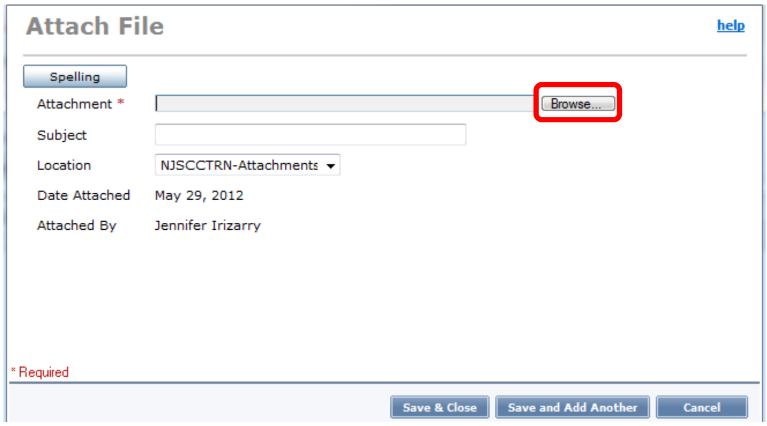
The Issue now shows in the Issues section of the document.

K. Attachments Tab

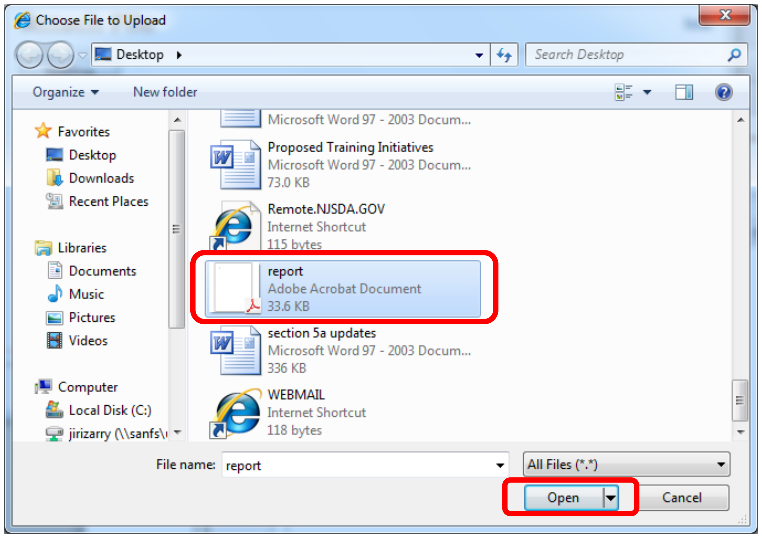
To attach supporting documentation, click the **Attach File** button.



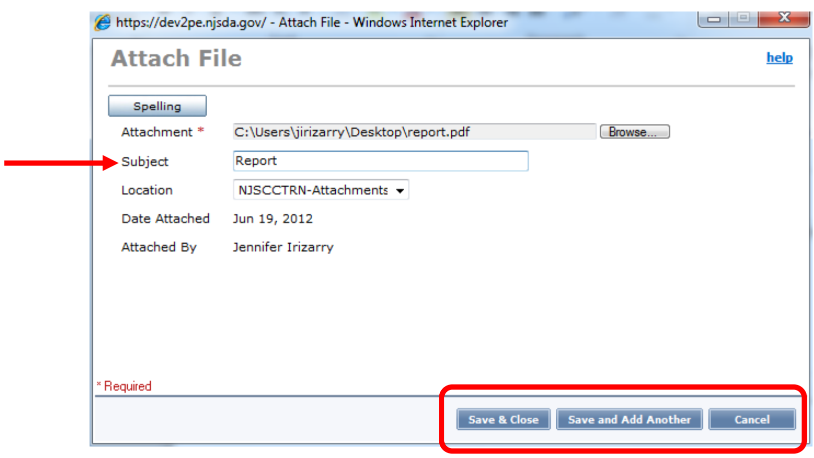
Click the **Browse** button to navigate to the document you wish to attach.



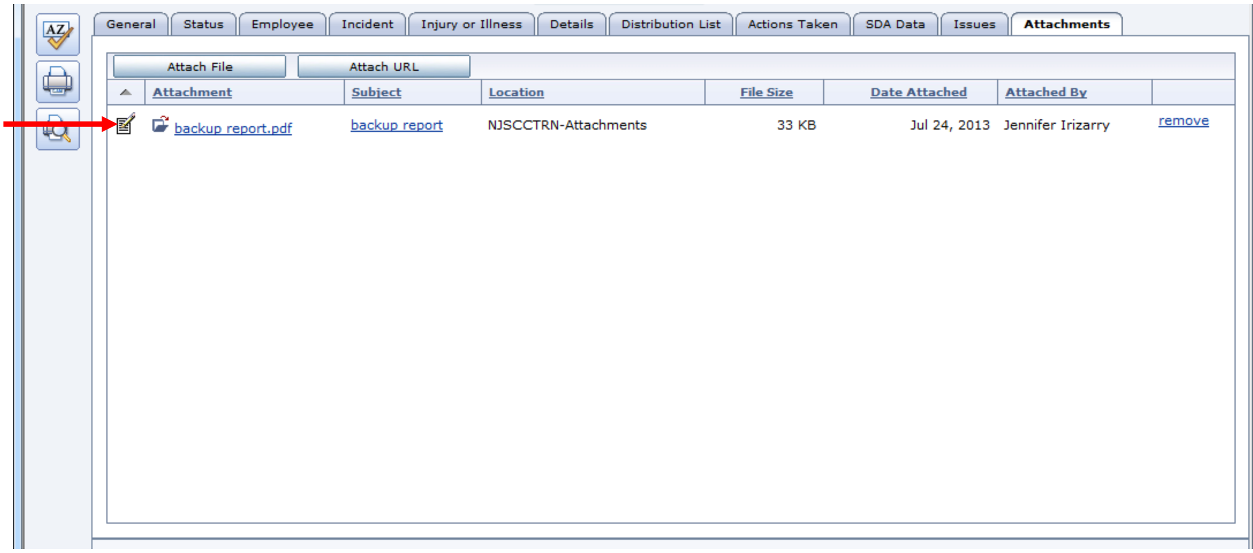
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



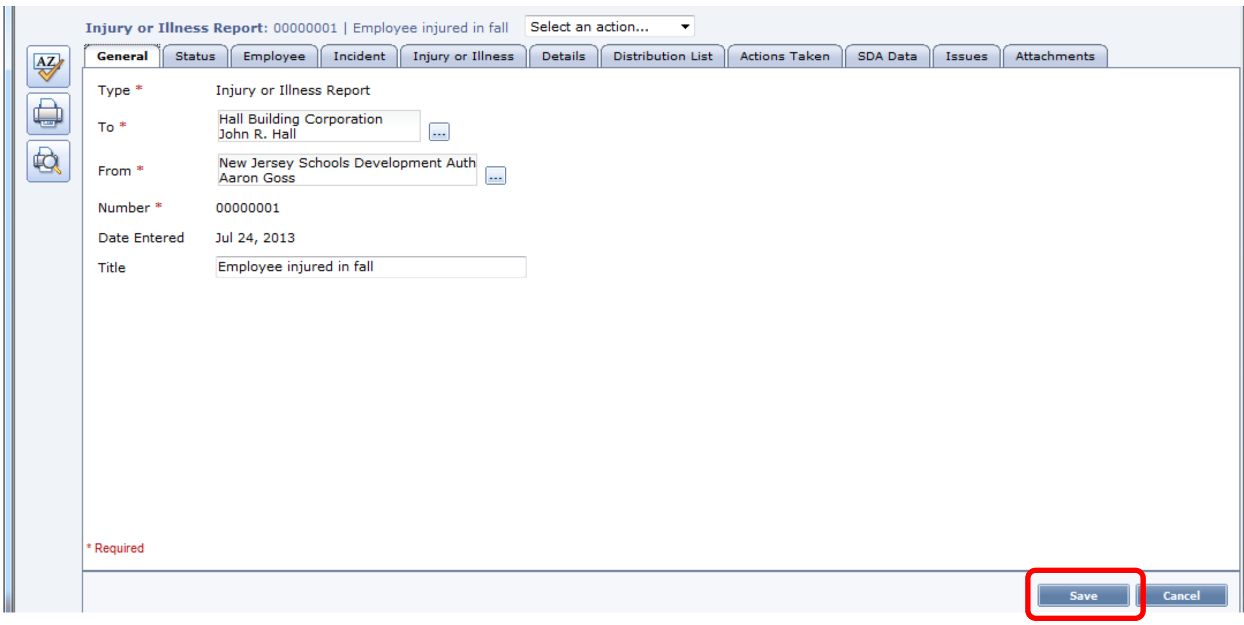
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



The attached file displays in the **Attachments** section.



When all fields are entered, click the **Save** button at the bottom of the window.



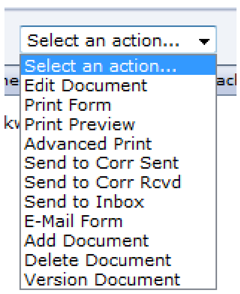
III. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

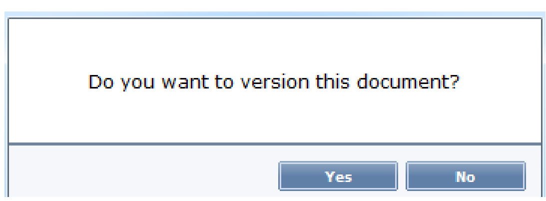
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

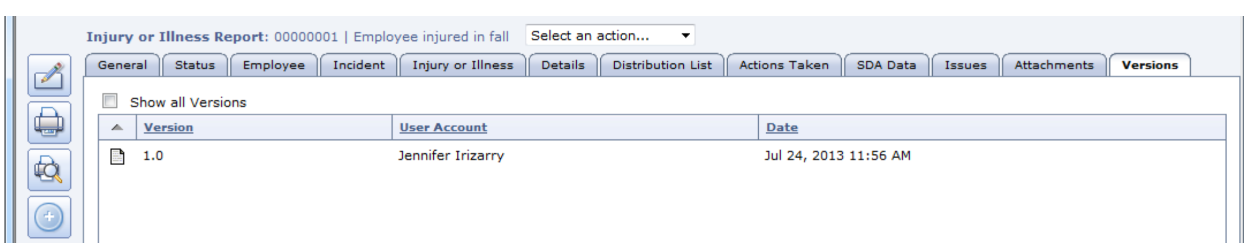
1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.

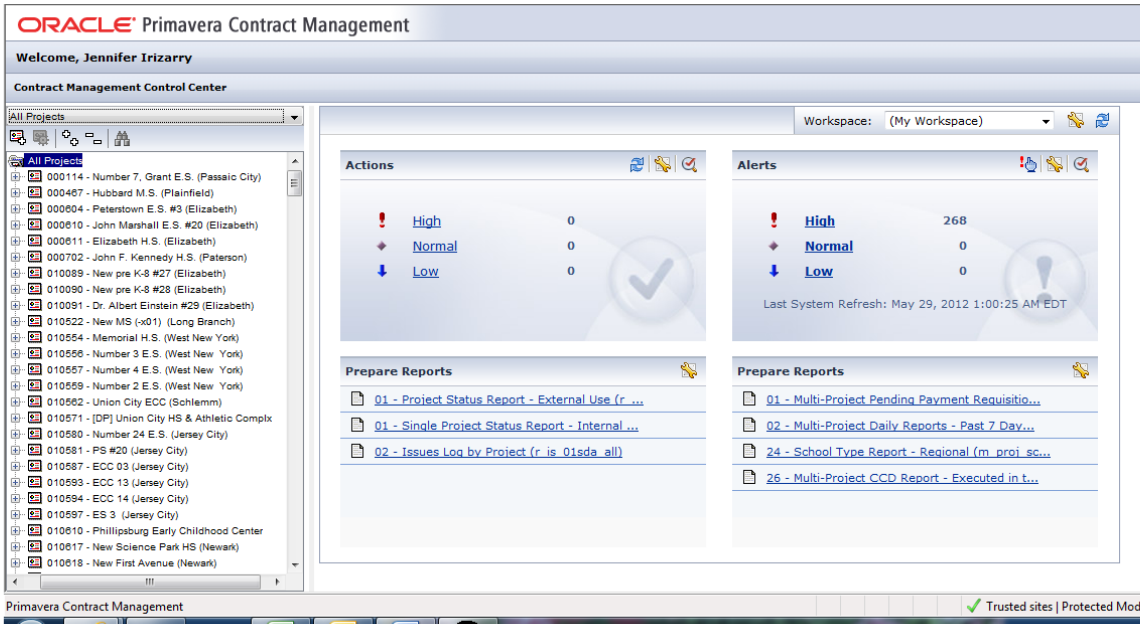


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



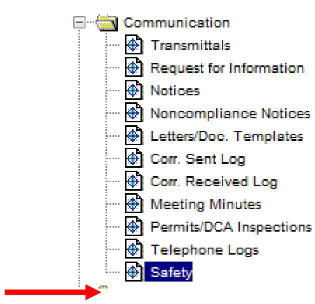
IV. Print a Safety Document

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



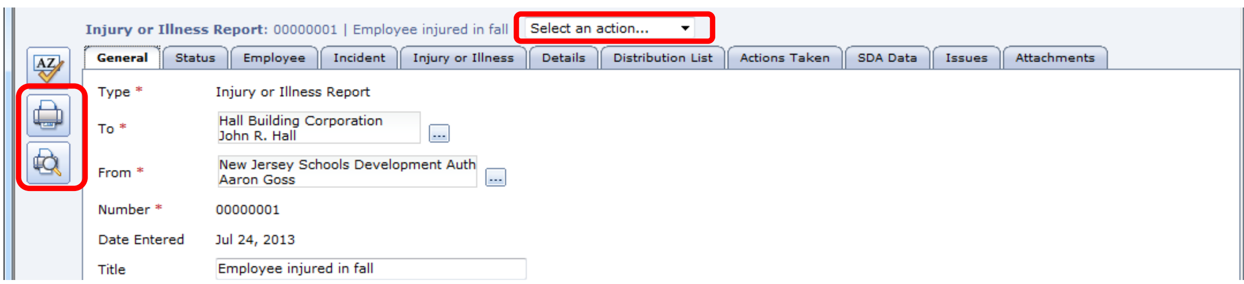
2. Select your desired project.

3. Open the **Communication** folder (a list of modules will display) and click the **Safety** module.

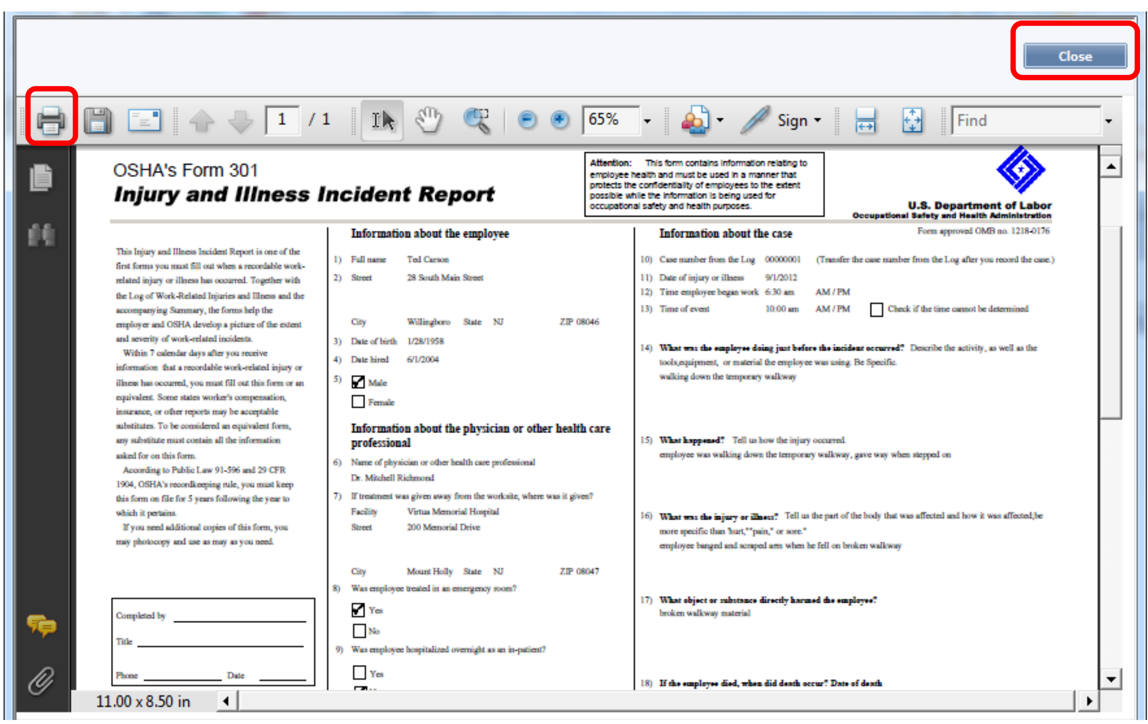


4. The **Safety log view** displays. Locate your desired document and click the **blue title link** to open it.

5. The document displays. To print the report, click the **Print Form** button to send the document to a printer, or click the **Print Preview** button to see a preview before printing. You can also **Advanced Print** from the **Select an action** menu at the top of the window.



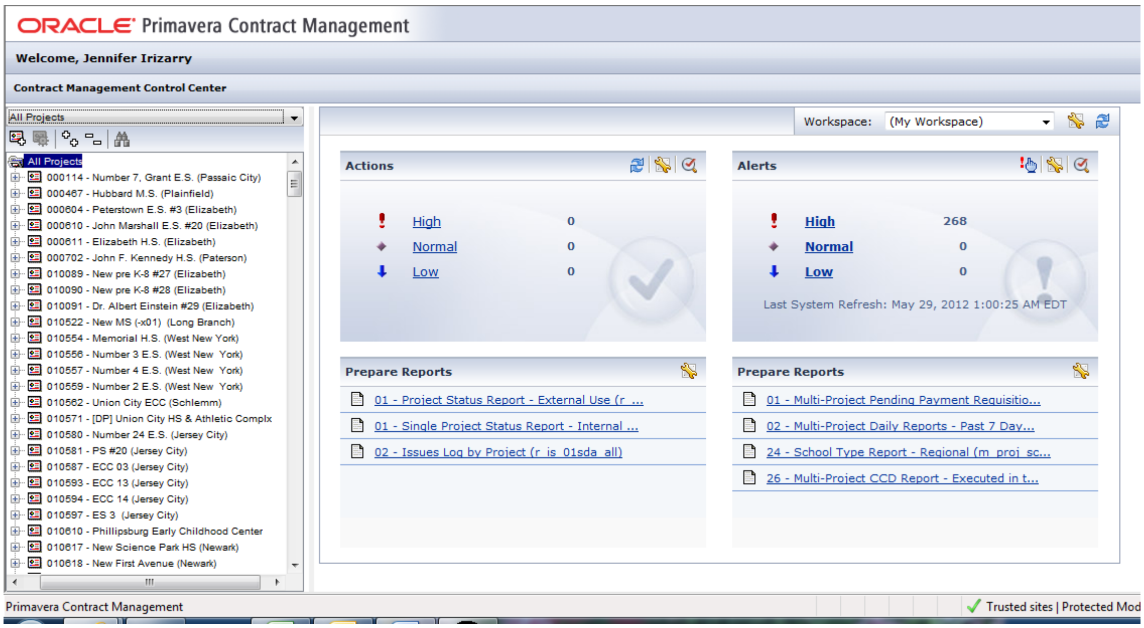
6. An example of an Injury and Illness report using the Print Preview button is shown. Click the **Print** button or the **printer icon** button to print this report. Click the **Close** button to return to the safety document.



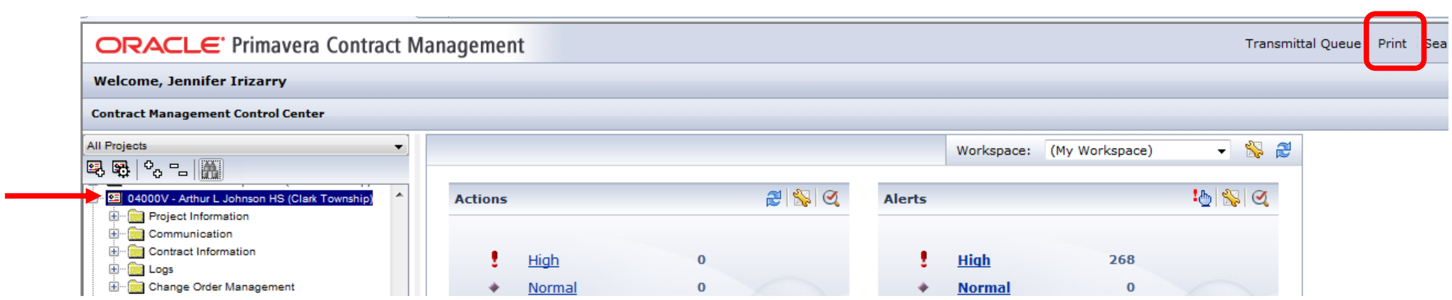
V. Safety Reports

There are other reports available from the Advanced Print option from the Control Center.

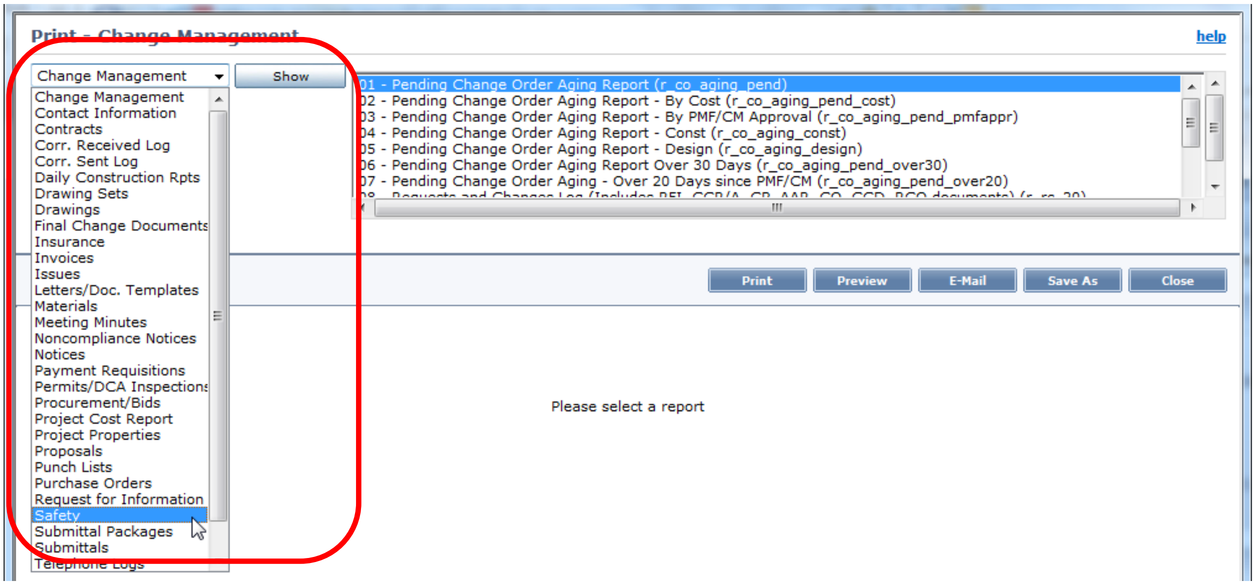
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



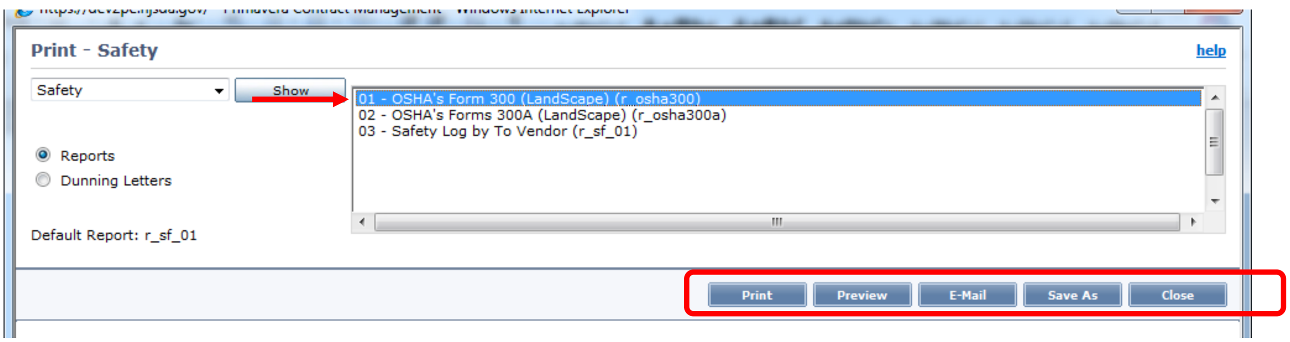
2. Select the project you wish to work with and click the **Print** link at the top right hand corner of the screen.



3. When the **Print dialog box** displays, choose **Safety** from the reports list on the left side of the screen, and click the **Show** button.



4. Choose the desired report from the report window, then click one of the following buttons.

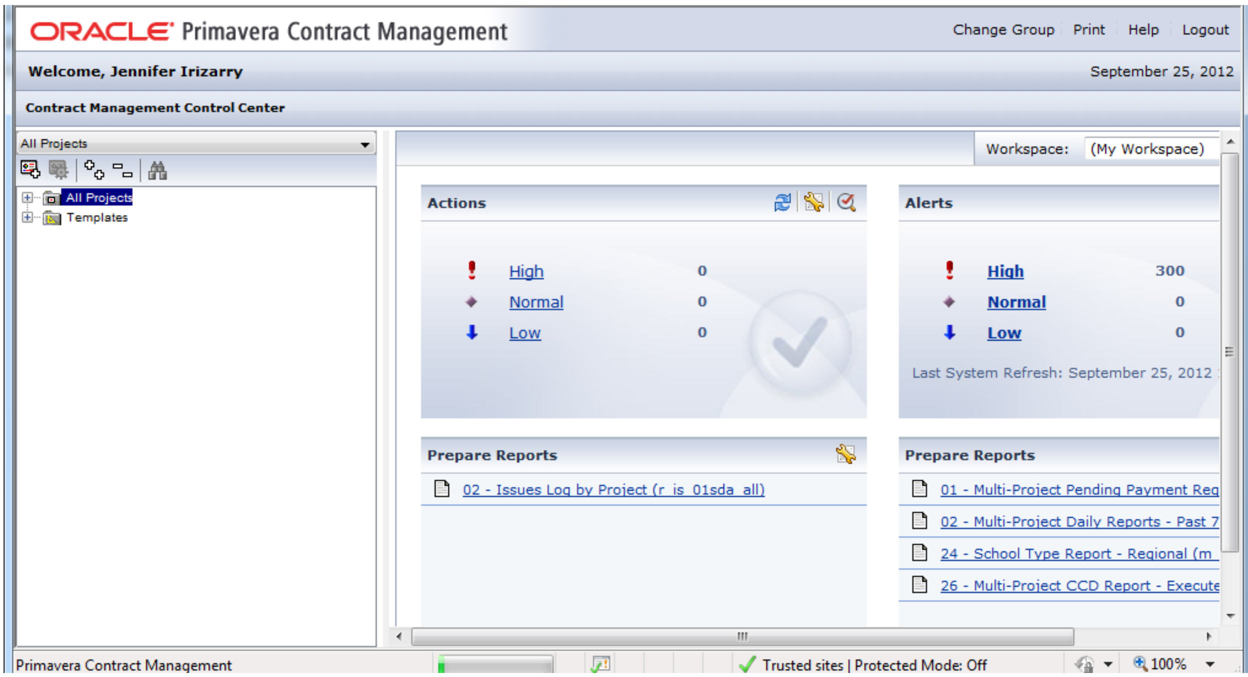


- Click **Print** to get a printed output.
- Click **Preview** to see your output displayed in the window.
- Click **E-Mail** to electronically send the output to another user.
- Click **Save As** to save the output to your local computer or other desired location.
- Click **Close** when finished to return to the Control Center screen.

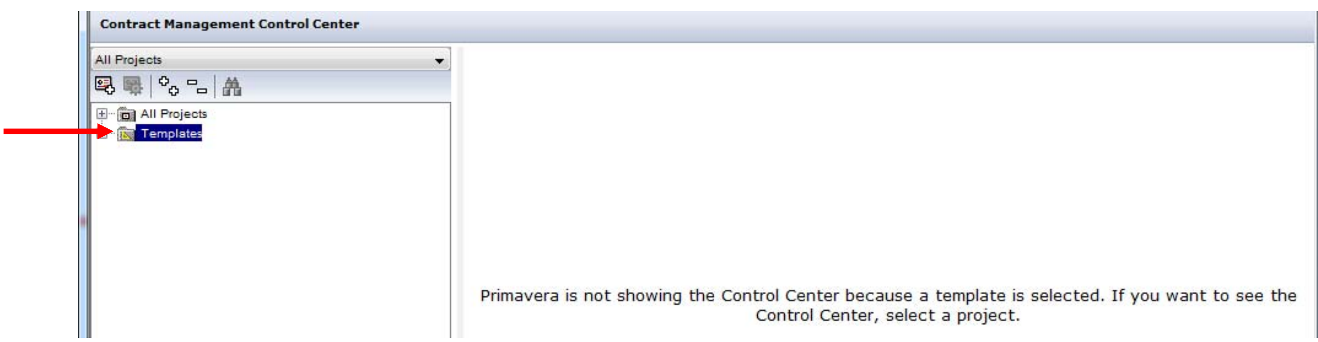
VI. Accessing DB02 Safety Reports

Information entered in the SDA's Safety team database is uploaded into Contract Management. These summary reports include checklists, daily and weekly reports. This section will describe how to access those reports in Contract Management.

1. Once logged into Primavera, the Contract Management Control Center screen displays (as shown).

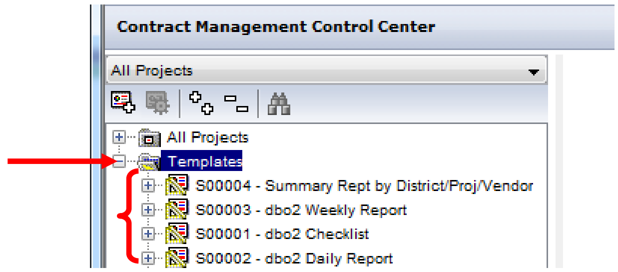


2. Select the **Templates** option located at the bottom of the project list on the left side of the screen.

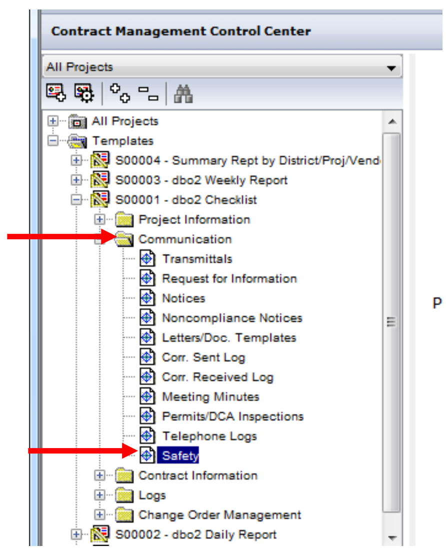


Important: ***When you select the Templates option, everything on the right side of the Control Center panel will disappear and you will see the message shown above. Your control center screen will return to normal when you select a different project.***

3. Click the **plus sign** next to Templates to display the available report types which are:
    - S00001 – db02 Checklist
    - S00002 – db02 Daily Report
    - S00003 – db02 Weekly Report
    - S00004 – Summary Rept by District/Proj/Vendor

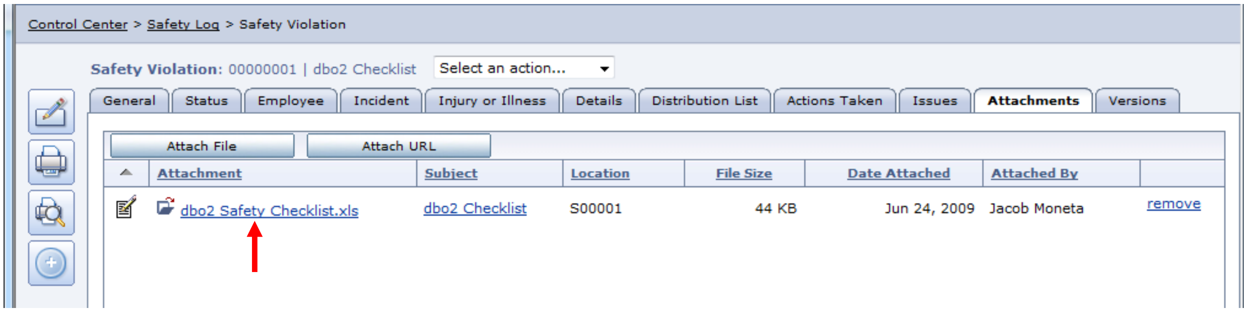


4. Click the **plus sign** next to the desired report type to display the list of subfolders. In the example shown, the db02 Checklist type has been selected. Click the **Communication** folder (a list of modules will display) and click the **Safety** module.



5. The **Safety log view** displays. Select the desired document by clicking the **blue title link** to open it.

6. The Safety document displays. Click the **Attachments** tab to view the attached file. Open the attached document by clicking the blue title link. The document will open in the native program in which it was created (i.e., PDF, Word or Excel).

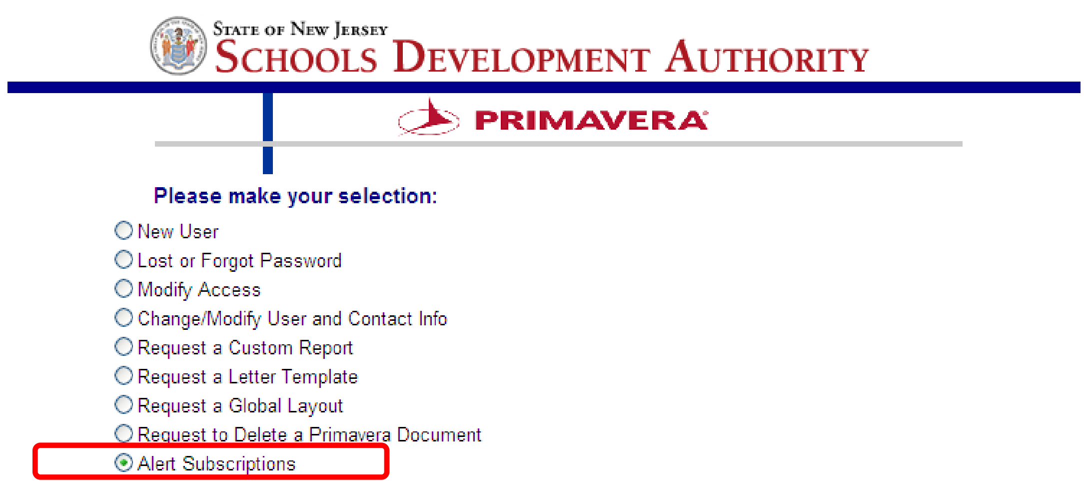


VII. Alert Subscription

Alerts allow a user to receive a notification when a document is entered, due or past due. The notification will display on the Control Center screen in the Alerts box. The Alerts box will provide a direct link to the applicable Contract Management document.

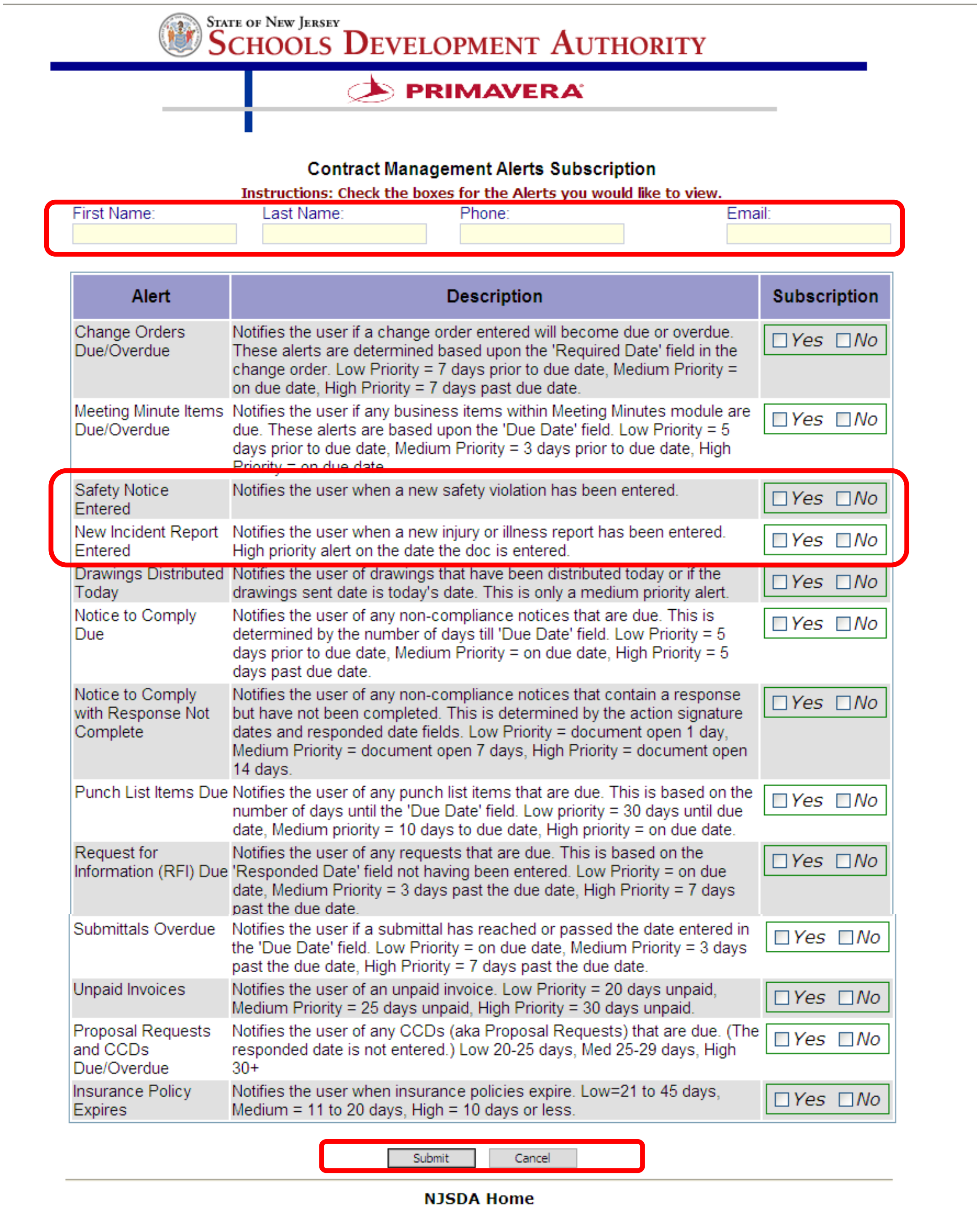
1. To subscribe to the Safety alerts, select the **Requests and Access Forms** link under the **Contract Management Login** section of the **Contract Management Splash Page**.

2. Select the **Alert Subscriptions** option.



3. The **Contract Management Alert Subscription** page will display. Complete the contact information at the top of the page. To subscribe to the alert for **Safety Violations**, click the **Yes** box located to the right of the **Safety Notice Entered** line item. To subscribe to the alert for **Injury or Illness Reports**, click the **Yes** box located to the right of the **New Incident Report Entered** line item. Click the **No** box when you no longer wish to receive an alert.

4. Once an alert has been selected, click the **Submit** button at the bottom of the page. The Contract Management Systems Administrator will notify you via e-mail when your alert subscription has been processed.



Contract Management Alerts Subscription

Instructions: Check the boxes for the Alerts you would like to view.

First Name: Last Name: Phone: Email:

Alert	Description	Subscription
Change Orders Due/Overdue	Notifies the user if a change order entered will become due or overdue. These alerts are determined based upon the 'Required Date' field in the change order. Low Priority = 7 days prior to due date, Medium Priority = on due date, High Priority = 7 days past due date.	☐ Yes ☐ No
Meeting Minute Items Due/Overdue	Notifies the user if any business items within Meeting Minutes module are due. These alerts are based upon the 'Due Date' field. Low Priority = 5 days prior to due date, Medium Priority = 3 days prior to due date, High Priority = on due date.	☐ Yes ☐ No
Safety Notice Entered	Notifies the user when a new safety violation has been entered.	☐ Yes ☐ No
New Incident Report Entered	Notifies the user when a new injury or illness report has been entered. High priority alert on the date the doc is entered.	☐ Yes ☐ No
Drawings Distributed Today	Notifies the user of drawings that have been distributed today or if the drawings sent date is today's date. This is only a medium priority alert.	☐ Yes ☐ No
Notice to Comply Due	Notifies the user of any non-compliance notices that are due. This is determined by the number of days till 'Due Date' field. Low Priority = 5 days prior to due date, Medium Priority = on due date, High Priority = 5 days past due date.	☐ Yes ☐ No
Notice to Comply with Response Not Complete	Notifies the user of any non-compliance notices that contain a response but have not been completed. This is determined by the action signature dates and responded date fields. Low Priority = document open 1 day, Medium Priority = document open 7 days, High Priority = document open 14 days.	☐ Yes ☐ No
Punch List Items Due	Notifies the user of any punch list items that are due. This is based on the number of days until the 'Due Date' field. Low priority = 30 days until due date, Medium priority = 10 days to due date, High priority = on due date.	☐ Yes ☐ No
Request for Information (RFI) Due	Notifies the user of any requests that are due. This is based on the 'Responded Date' field not having been entered. Low Priority = on due date, Medium Priority = 3 days past the due date, High Priority = 7 days past the due date.	☐ Yes ☐ No
Submittals Overdue	Notifies the user if a submittal has reached or passed the date entered in the 'Due Date' field. Low Priority = on due date, Medium Priority = 3 days past the due date, High Priority = 7 days past the due date.	☐ Yes ☐ No
Unpaid Invoices	Notifies the user of an unpaid invoice. Low Priority = 20 days unpaid, Medium Priority = 25 days unpaid, High Priority = 30 days unpaid.	☐ Yes ☐ No
Proposal Requests and CCDs Due/Overdue	Notifies the user of any CCDs (aka Proposal Requests) that are due. (The responded date is not entered.) Low 20-25 days, Med 25-29 days, High 30+	☐ Yes ☐ No
Insurance Policy Expires	Notifies the user when insurance policies expire. Low=21 to 45 days, Medium = 11 to 20 days, High = 10 days or less.	☐ Yes ☐ No

Submit Cancel

NJSDA Home

5. These alerts will be triggered any time a Safety Violation or Injury or Illness report is entered in the system. The alerts will be sent via the Control Center in the **Alerts** option box. Click the applicable priority link (High, Normal or Low) to view the alert.

6. The **Alerts** screen will display all applicable documents. Click on a **blue title link** to open the document for review.
   Note: both safety alerts will only display the same day a document was entered. They will disappear the following day.