



Affsaf

Safety 360 Elite

Safety Files



How to set up and manage Safety
Files on your system

Introduction

This information guide will assist the user with creating, managing/editing and using Safety 360 Elite Safety File Process.

To create and use a Safety File on the system the following must be in place:

- Employees created on system and all Employee Documents loaded to their profiles
- All company Documents including Policies, Procedures, Plans etc have been loaded to Safety 360 Elite File Manager

*** If you will be sharing files with people outside your organisation, make sure you have your Connected company's set-up**

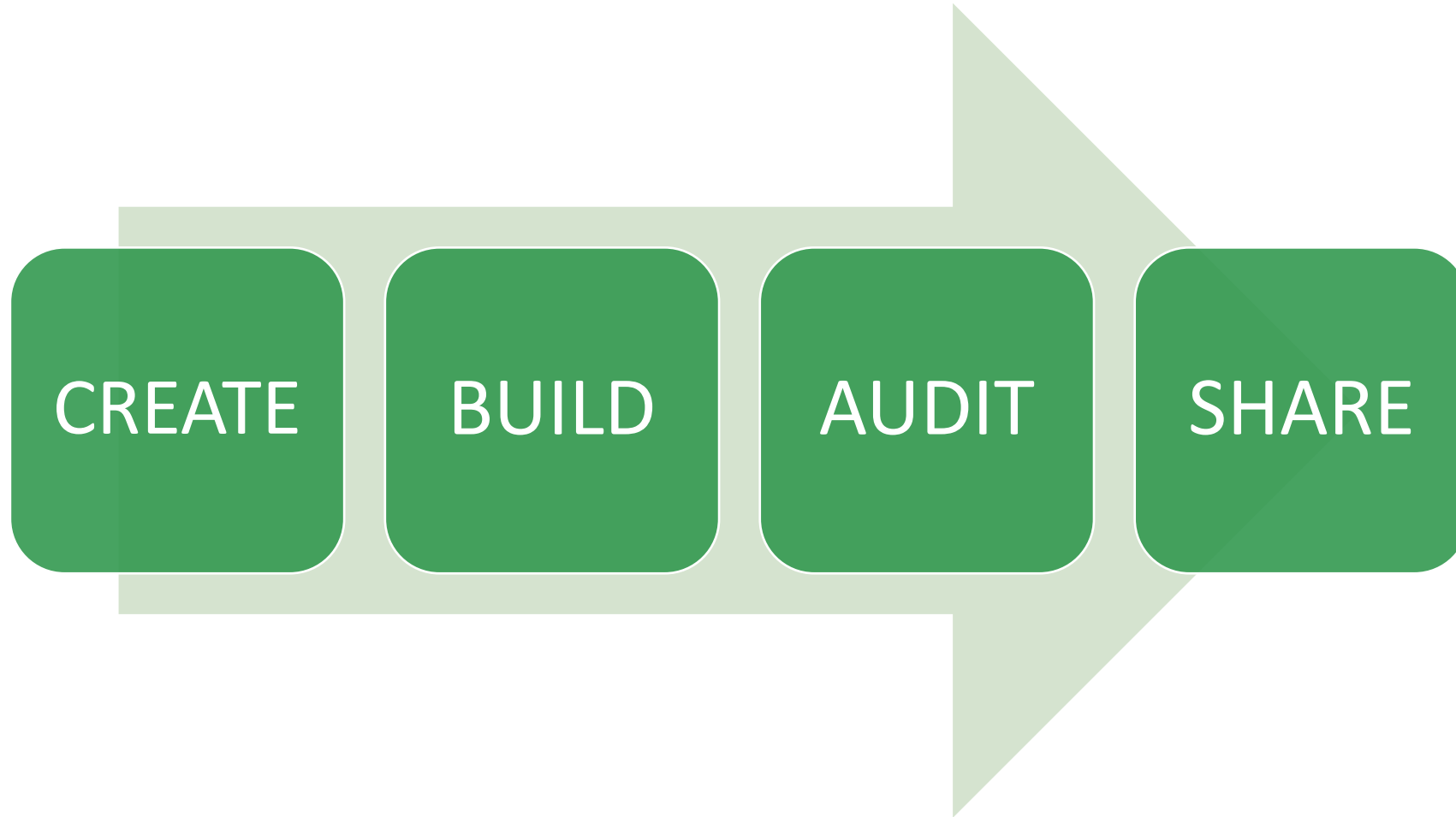
Only users with the role of Safety File Controller can be added to Safety File.
Only users with role of Contractor Manager can receive files.

The Safety File process on Safety 360 Elite comprises of the following stages:

1. **Create File** – Master/Safety/Contractor
2. **Populate File** – Import from IMS/Upload
3. **Self Audit** or **Share Internally**
4. **Share Externally**

Introduction

Each Safety File will go through the following stages



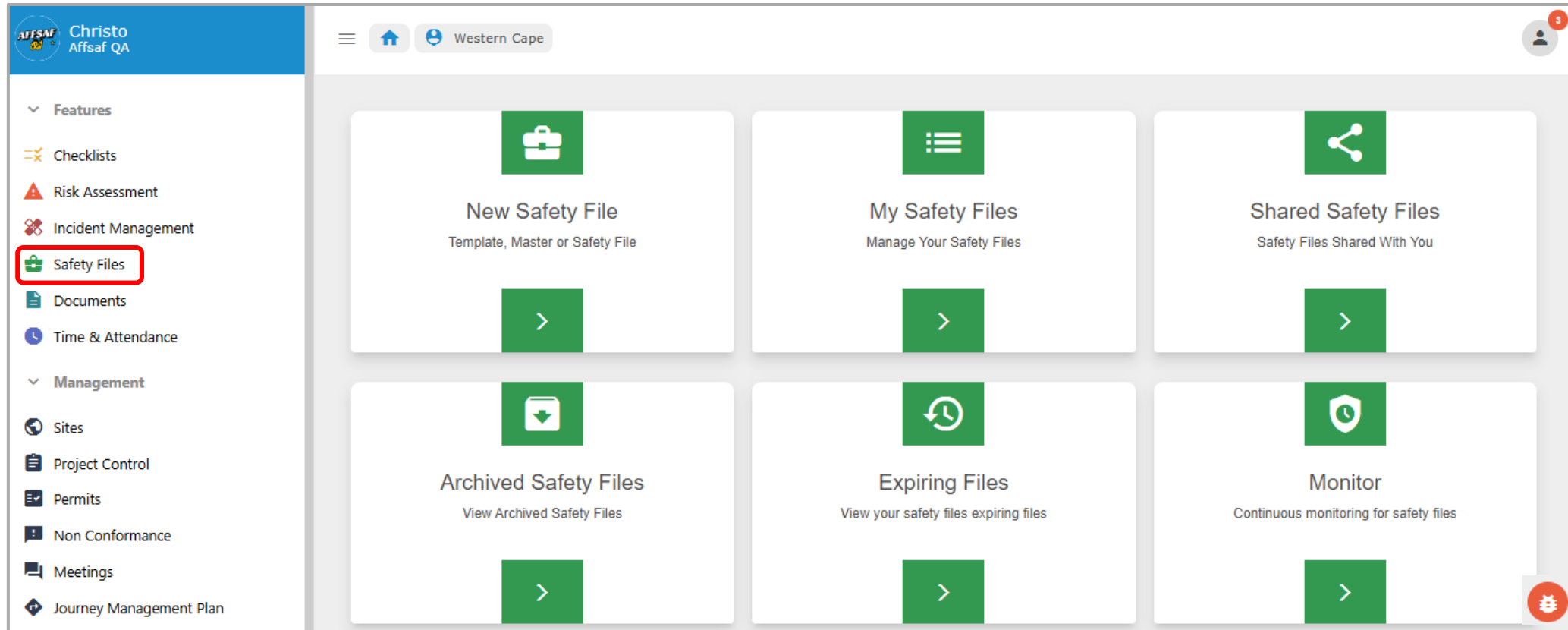


SAFETY 360 Elite

Main Safety File Page

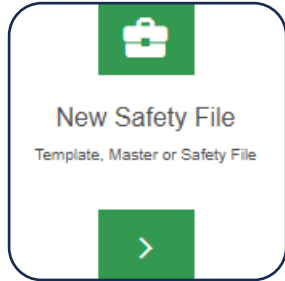
Introduction

On the left navigation pane of Safety360 Elite you will find the  Icon. Click the icon to navigate to the main Safety Files dashboard. This is also where you find existing Safety Files once created. You can log a ticket for a suggestion or bug by selecting this  button.



Main Dashboard

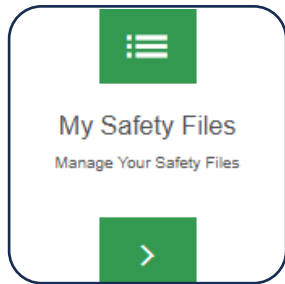
On the Main Safety File Page you will find the following Cards:



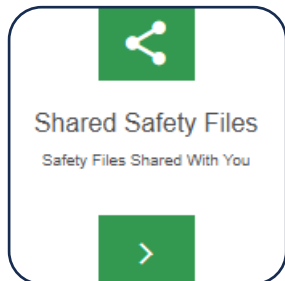
Here you can build a Master / Safety / Contractor file. This is the creation portal.



1. **Master File = Structure + Content**
2. **Safety File = Shareable copy to your client**
3. **Contractor File = File used for the retrieval of contractor data**



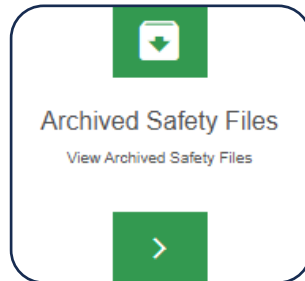
Here you can manage existing Master / Safety / Contractor files. This is the population portal.



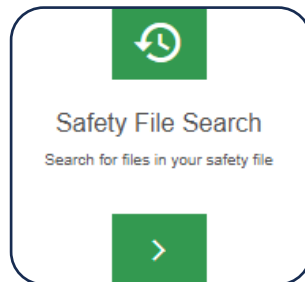
Files that have been shared with you from other Safety 360 Elite systems

Main Dashboard

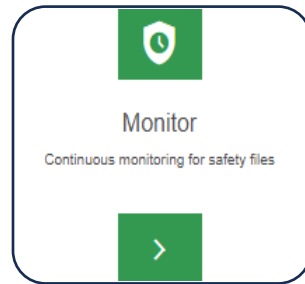
Main Safety File Page continued:



Files that have been Archived.
Can be returned by Control User



Here you can search and manage
expiring files inside Safety Files.
This register will search through
all Files and show document and
file expiry



This card will allow the user to
setup continuous monitoring of
the safety file. It ensures that
your safety file stays relevant
and up to date



SAFETY 360 Elite

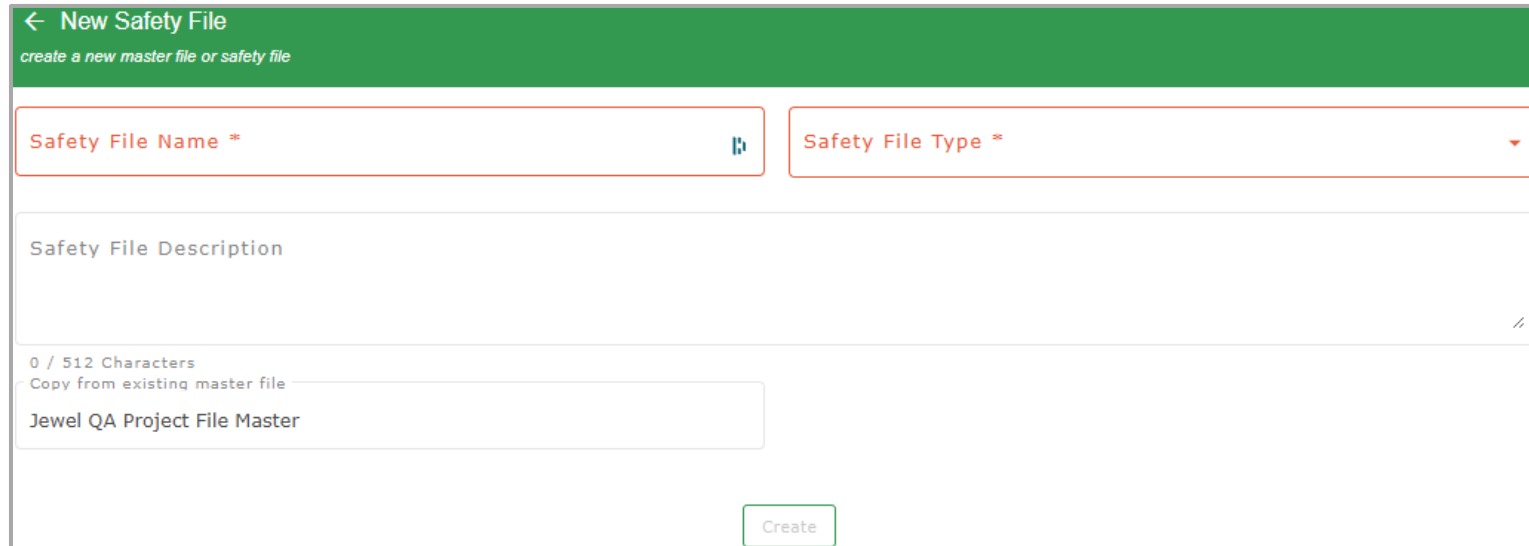
New Safety File

New Safety File

This information guide will assist the user with creating a Master, Safety or Contractor file on your system

When clicking on “New Safety File” you will be taken to the creation page. Here you will need to add the:

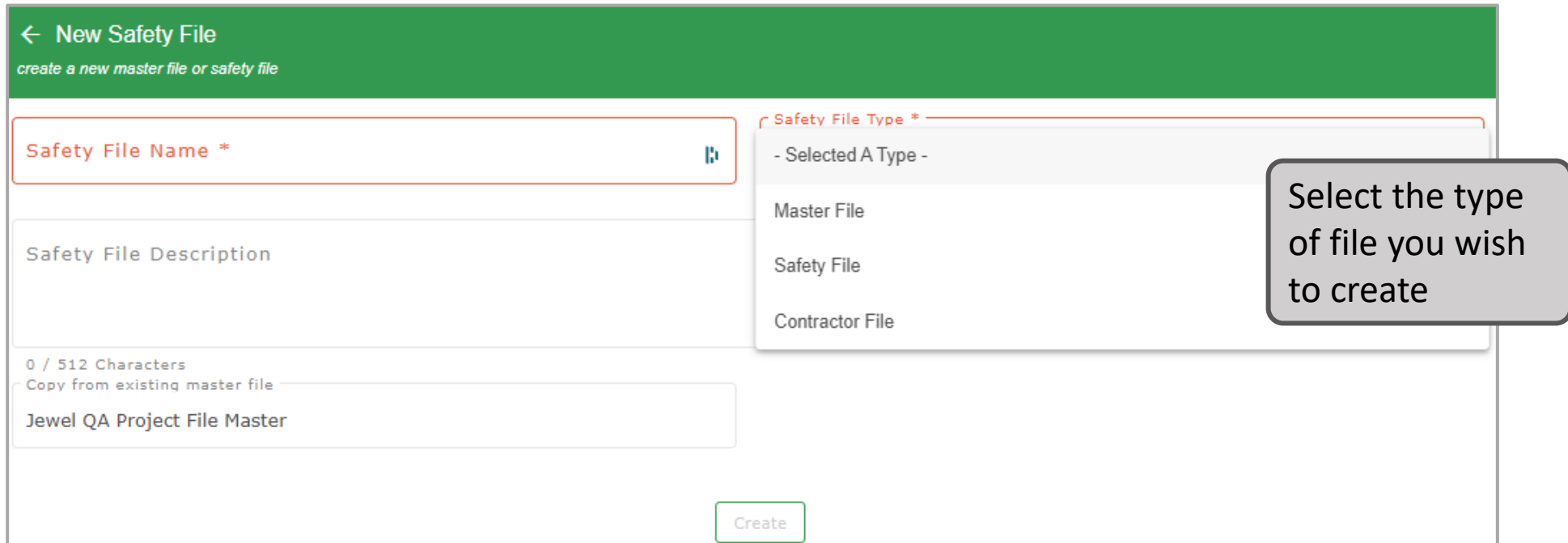
- Safety File name
 - This is the unique name used to identify the safety file
- Safety File Type
 - There are 3 types of Files to build, choose one here (see next page)
- Safety File description
 - Optional description for File
- Copy from Master
 - This allows copies to be made of Master Files



The screenshot shows a web form titled "New Safety File" with a subtitle "create a new master file or safety file". The form has a green header bar. Below the header, there are two input fields: "Safety File Name *" and "Safety File Type *". The "Safety File Name" field has a small icon of a document with a plus sign. The "Safety File Type" field has a dropdown arrow. Below these fields is a large text area for "Safety File Description". At the bottom of the form, there is a checkbox labeled "Copy from existing master file" which is checked, and a text input field containing "Jewel QA Project File Master". A "Create" button is located at the bottom right of the form.

New Safety File

Selecting a file type from the dropdown



The screenshot shows a web form titled "New Safety File" with a green header bar. Below the header, there is a sub-header "create a new master file or safety file". The form contains several input fields: "Safety File Name *" (highlighted with a red border), "Safety File Description", and "Copy from existing master file" (containing the text "Jewel QA Project File Master"). A character count "0 / 512 Characters" is visible below the description field. To the right of the "Safety File Name" field, a dropdown menu for "Safety File Type *" is open, showing three options: "Master File", "Safety File", and "Contractor File". A grey callout box with the text "Select the type of file you wish to create" points to the dropdown menu. A "Create" button is located at the bottom right of the form.

← New Safety File
create a new master file or safety file

Safety File Name *

Safety File Type *

- Selected A Type -
- Master File
- Safety File
- Contractor File

Select the type of file you wish to create

Safety File Description

0 / 512 Characters

Copy from existing master file

Jewel QA Project File Master

Create

New Safety File – Types of Files

The following table explains the different types of Safety Files:

Type	Description
1. Master	Structure of a safety file – with or without content. You can re-use the master. The purpose is to get a Safety File to a client by copying from the Master file.
2. Safety File	The safety file will be shared with the client. You can either start fresh and build a new safety file or you can copy from the master and add site-specific documents. A Safety File contains YOUR data, and all your files will be filed in one space for easy access.
3. Contractor File	It is a Safety file that is shared with the contractor. You can either start fresh or you can build a new contractor file. Normally, it will be an index for the Contractor to populate and return to you for auditing. A Contractor File contains the CONTRACTOR data, all the Contractor files will be filed in one space for easy access.

New Safety File

You can copy from Safety 360 Templates or from your existing files

← New Safety File

create a new master file or safety file

Safety File Name *

Safety File Type *

Safety File Description

0 / 512 Characters

Copy from existing master file

Safety 360 Templates

Vodacom Gate 1

Vodacom Gate 2

Vodacom External Events (High Risk)

Vodacom Internal Events (Low-Medium Risk)

Select from Safety 360 templates or existing files in your system

New Safety File

You can copy from Safety 360 Library or from your existing Master file

← New Safety File

create a new master file or safety file

Safety File Name *

Demo Safety File

Safety File Type *

Master File

Folder Structure + Content

Safety File Description

This is to demonstrate how Safety files are built from scratch

64 / 512 Characters

Copy from existing master file

Vodacom Gate 1

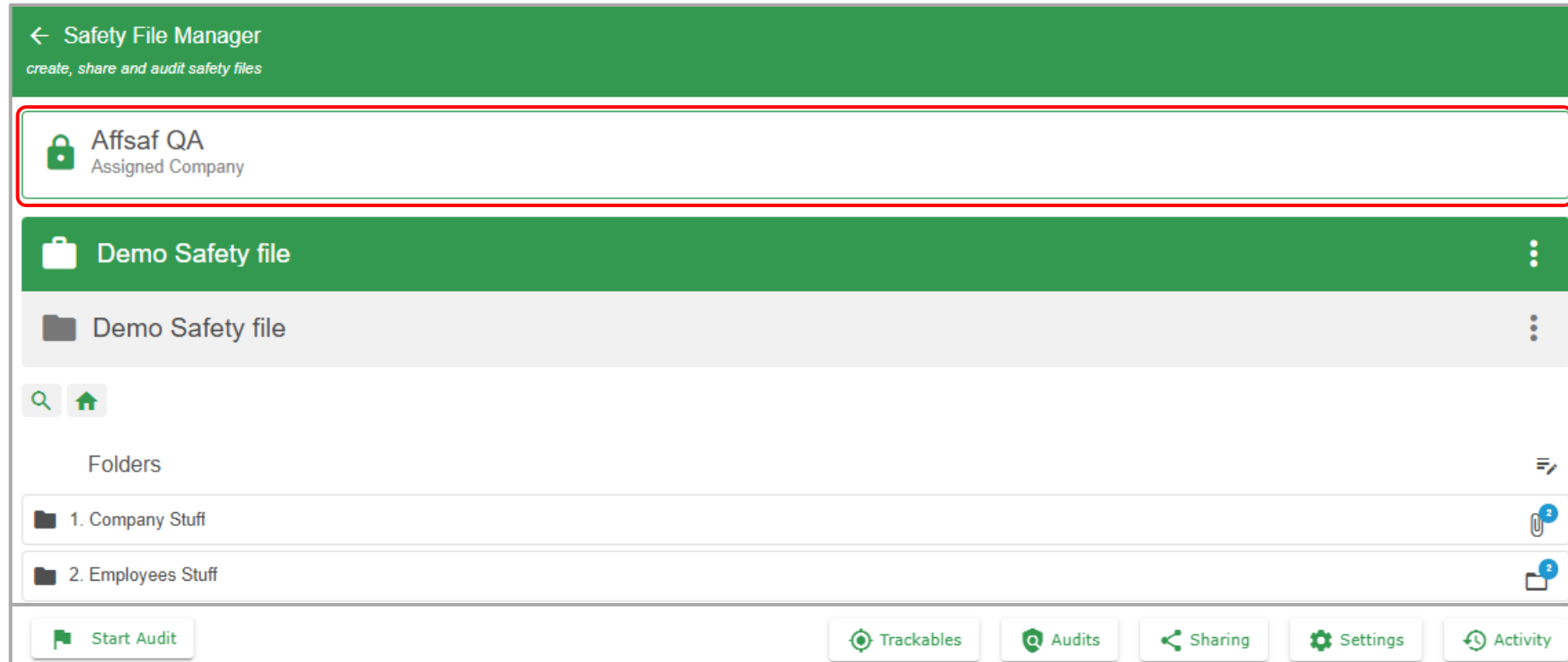
Create

Once all mandatory fields are completed the “Create button” becomes available

Once you select the “Create” your safety file will pop up in the selected file type folder.

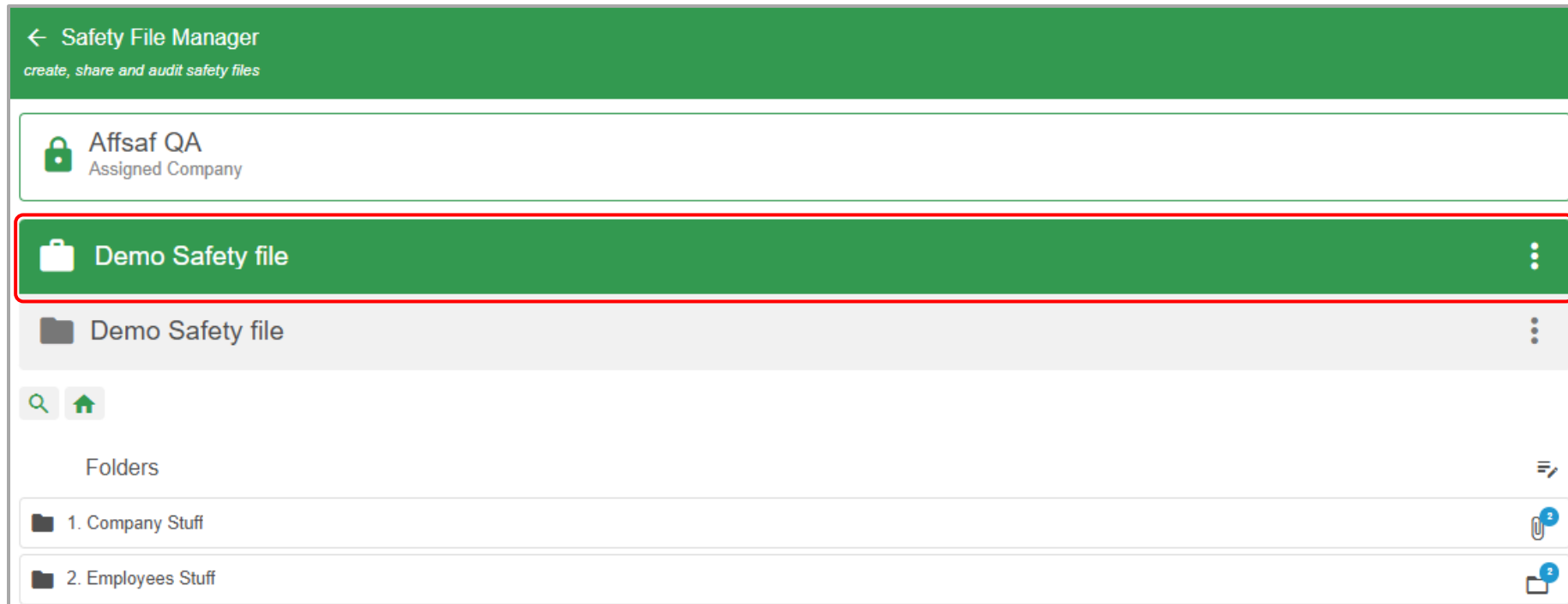
Safety File – Assigned To

The first thing to note is the “Assigned to:” bar shown. All types of Files on Safety 360 Elite have, check-out mechanism to assign to the entity, It allows the entity to work on the File. Only 1 Entity at a time to ensure data validity. If not assigned to an entity more than one can work on the file



Safety File – Main File Bar

The next option is the GREEN Bar with the Safety File name as shown below.
This is the Main File Management Bar.

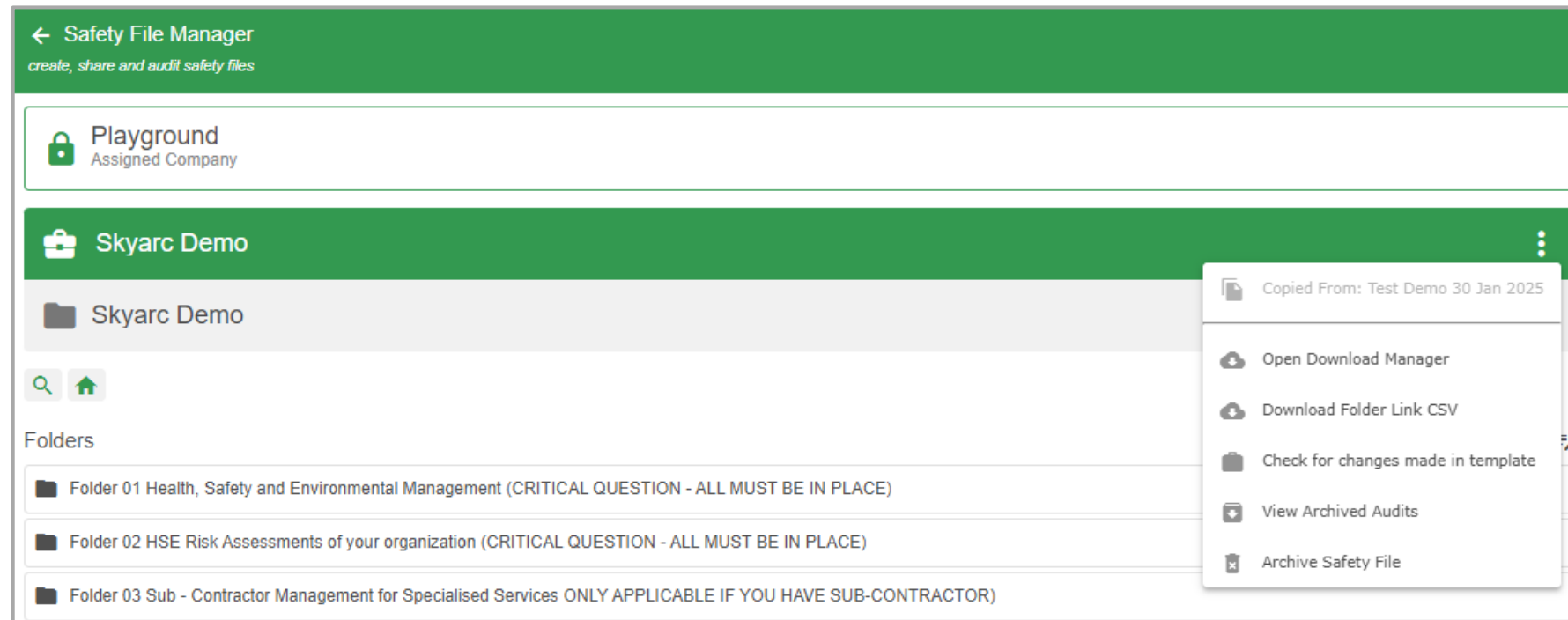


Clicking these 3 dots will open the Menu bar for the Safety File

Safety File – Main File Bar Menu

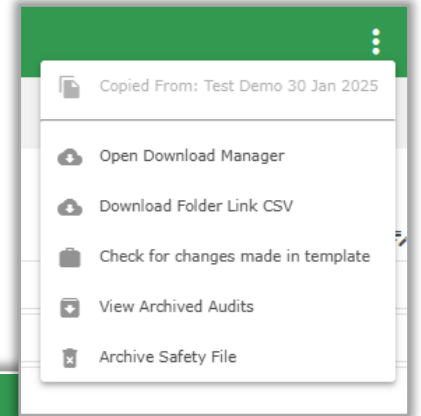
You can access the Main File Bar Menu by clicking the 3 dots in the GREEN bar as shown in the previous slide.

This menu will allow you to **Open Download Manager**, **Download folder link in .CSV**, **Check for changes made**, **View Archived Audits** and **Archive Safety File**



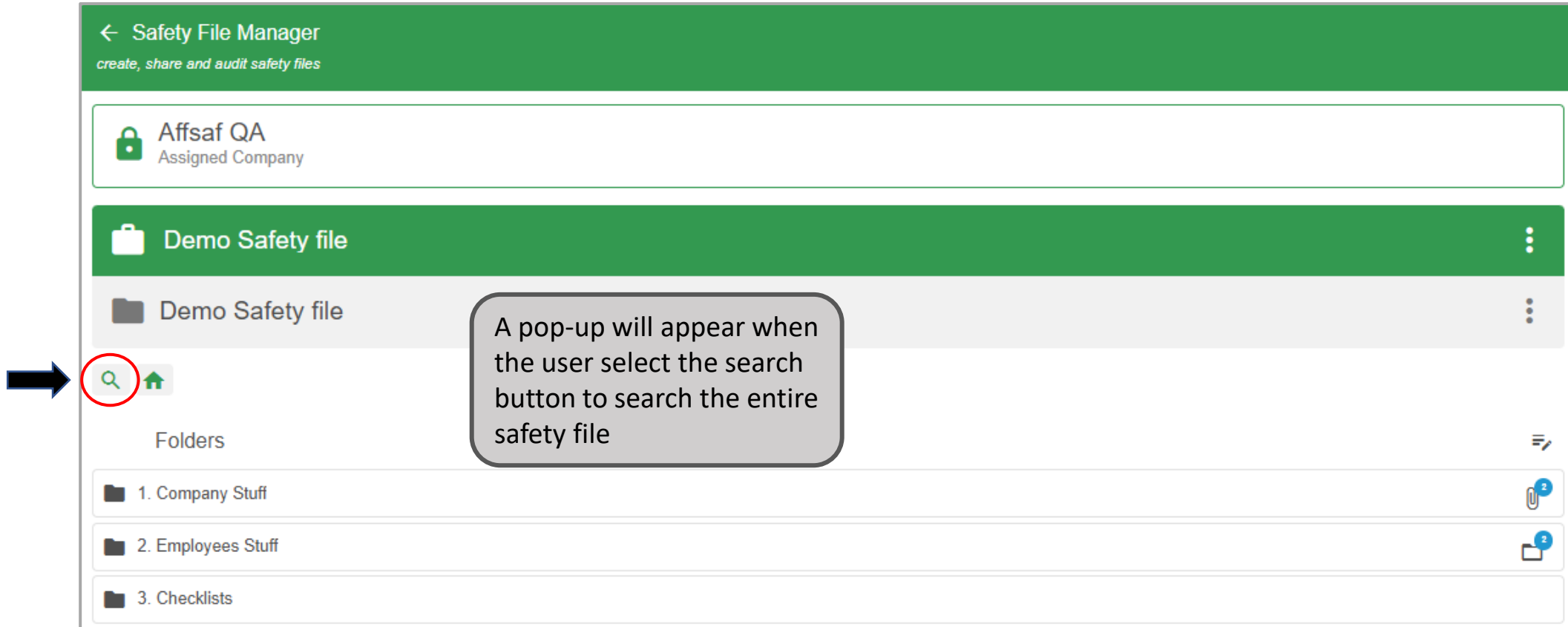
Safety File – Main File Bar Menu

Description of the three dots on the green main menu bar



Action	Description
Open Download Manager	This is where you can download the entire safety file in zip format. Once a zip file is created, it will be available to all users that have access to this file
Download folder Link .CSV	Download a .CSV file of the safety file
Check for changes made in template	Allows you to View Files in the Template that are not in your safety file
View Archived Audits	This will show all archived audits
Archived Safety File	Here you can archive the entire Safety File.

Safety File – Search Menu



← Safety File Manager
create, share and audit safety files

Affsaf QA
Assigned Company

 Demo Safety file

 Demo Safety file

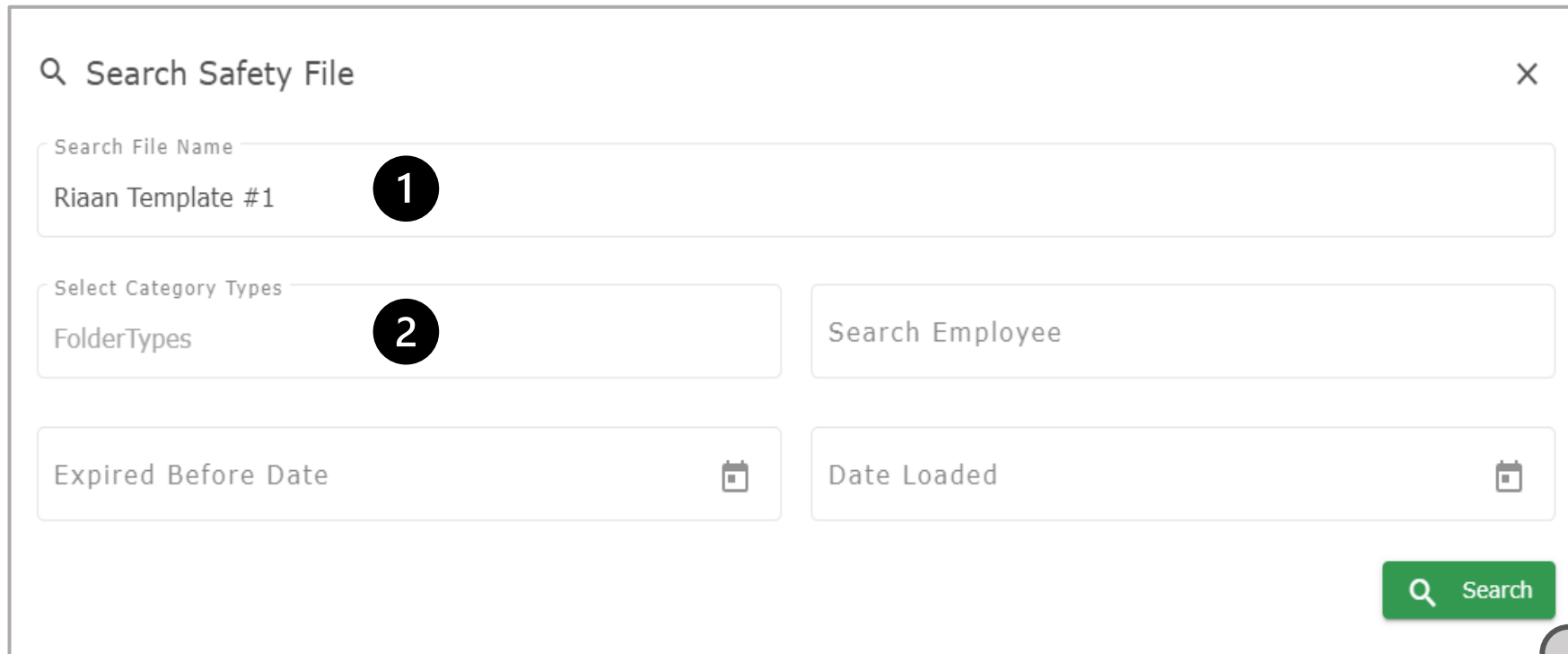
Folders

-  1. Company Stuff
-  2. Employees Stuff
-  3. Checklists

A pop-up will appear when the user select the search button to search the entire safety file

Safety File – Search Menu continue

- 1 Populate the Search pop-up by completing at least one field.
- 2 From the drop down menu under Category types, there are various topics to choose from to make the search more specific.



Search Safety File

Search File Name

Riaan Template #1

Select Category Types

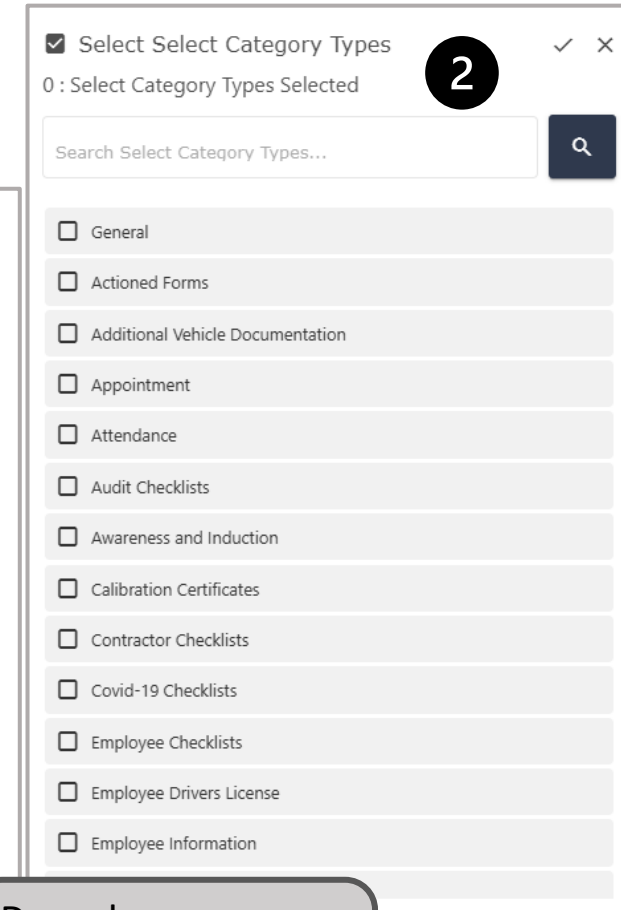
FolderTypes

Search Employee

Expired Before Date

Date Loaded

Search



Select Select Category Types

0 : Select Category Types Selected

Search Select Category Types...

General

Actioned Forms

Additional Vehicle Documentation

Appointment

Attendance

Audit Checklists

Awareness and Induction

Calibration Certificates

Contractor Checklists

Covid-19 Checklists

Employee Checklists

Employee Drivers License

Employee Information

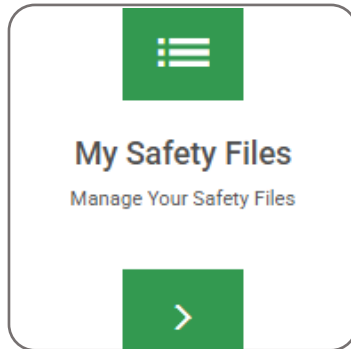
Drop down menu
under Category
Types:



SAFETY 360 Elite

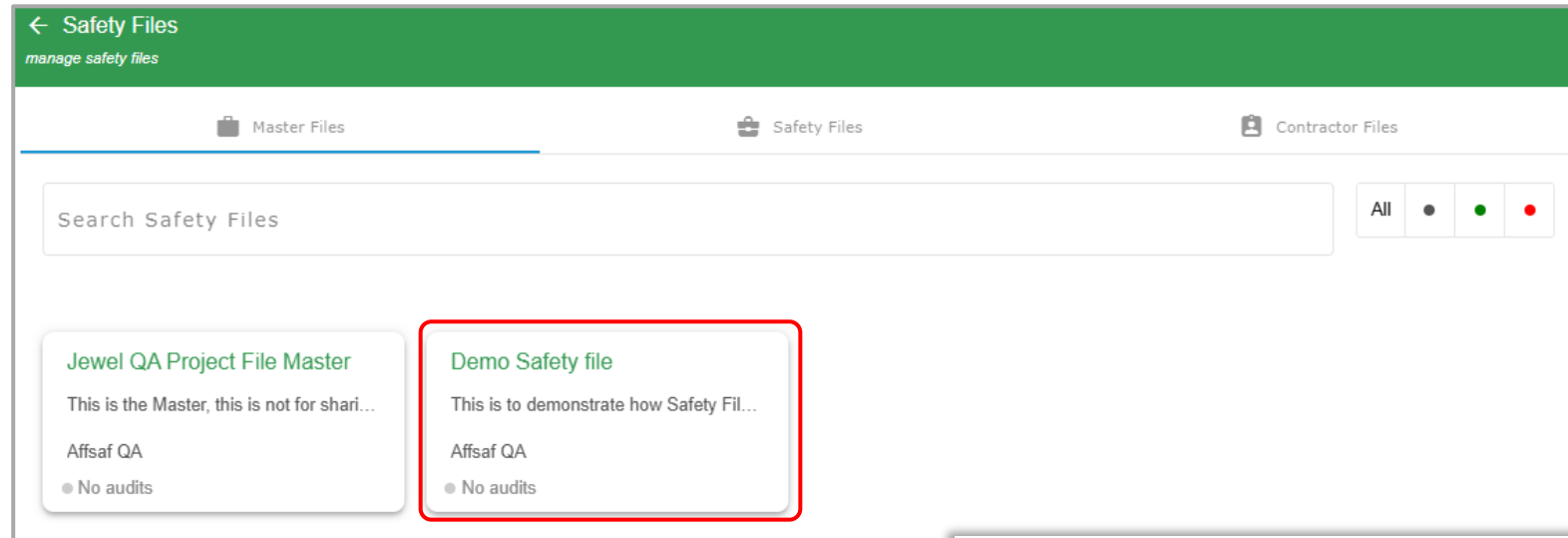
Stage 2

Stage 2 - BUILD



This information guide will assist the user with managing, editing, populating an existing File. Existing files can be found under My Safety Files on the main Safety Files page.

Users can click on the **CARD** to open file Dashboard



From here the user will see TABS for each of the 3 Safety File types (**Master / Safety / Contractor**) where they will see a CARD for each Safety File

File name

Demo Safety file

This is to demonstrate how Safety Fil...

System of origin

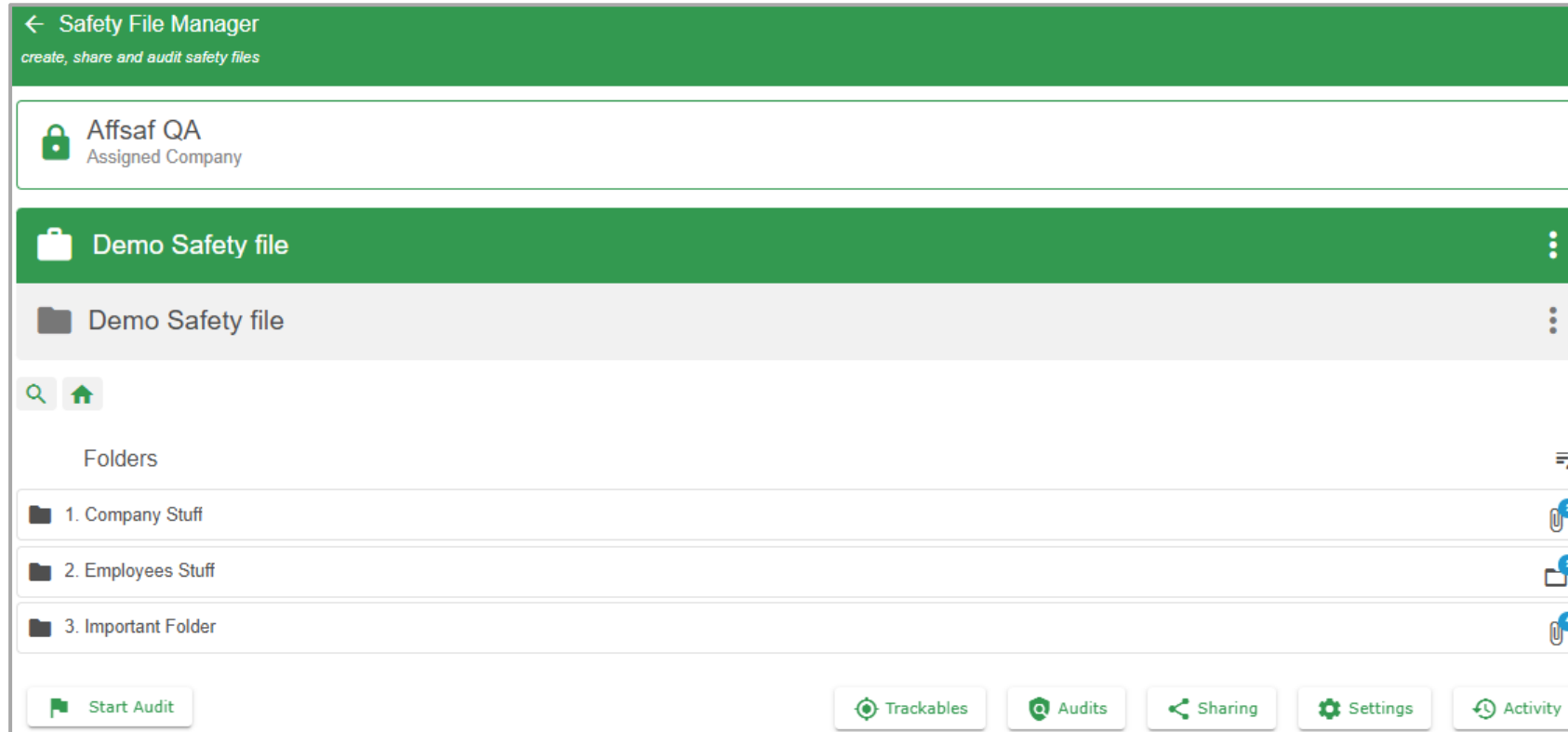
Affsaf QA

Audit status

● No audits

Stage 2 – BUILD – Safety file Dashboard

Upon opening the Safety File by clicking on the relevant card, the user is taken to the Safety File Dashboard where they can Manage, Edit, and Populate the Safety File. For our demo today we will be using the Master File type called: Demo Safety File.



<Main = archive/download

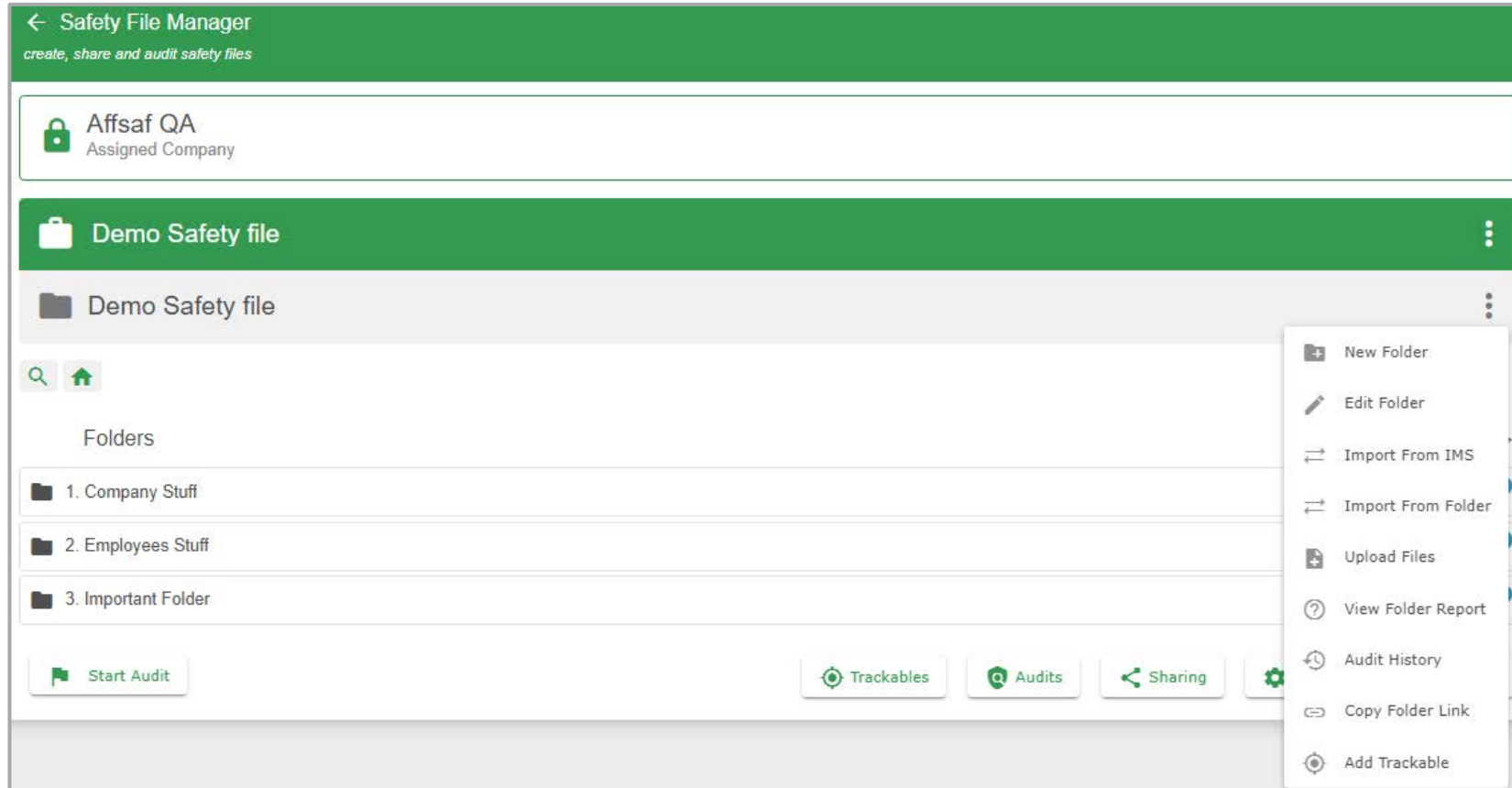
<Current = edit/create/add

if you select folder one, the current folder name will change to folder one's details

The Current folder (grey bar) will change depending on where you are, it will display current folder Name.
Changes and Updates made, selecting tabs from the menu will affect the current folder displayed on the grey bar

Stage 2 – BUILD - Safety file Dashboard

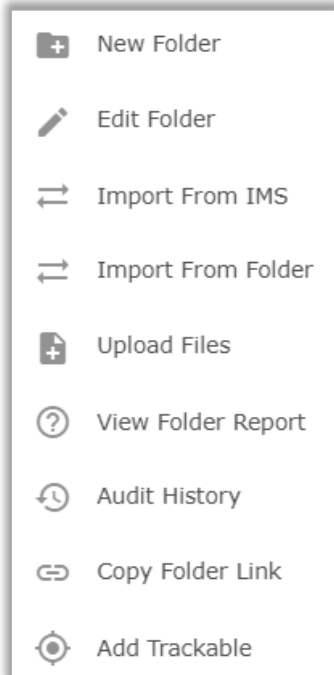
By clicking the 3 DOTS in the CURRENT FOLDER “Grey bar”, will open a dropdown



When creating a New Folder the user will be tasked with entering Folder Name and Folder Type.
As default users should use the : General Folder Type

Stage 2 – BUILD - Safety file Dashboard

By clicking the 3 DOTS in the CURRENT FOLDER “Grey bar”, will open a dropdown

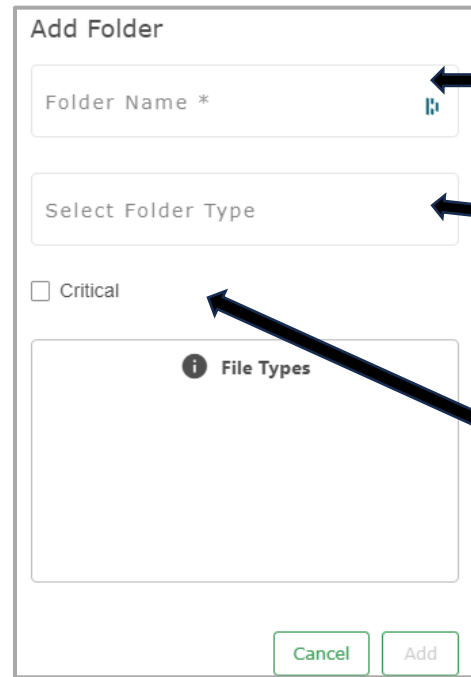
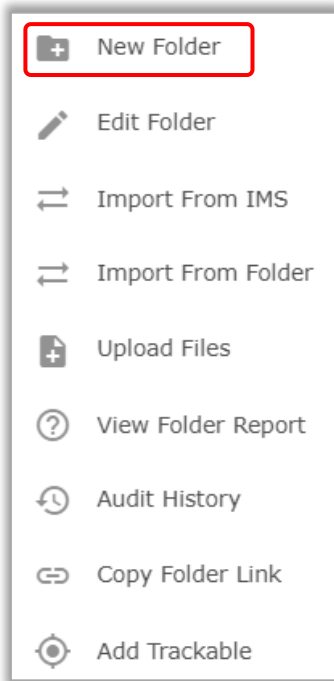


Type	Description
New Folder	Create New Folder, normally as per client requirements
Edit Folder	Editing the name you have given to the folder in previous step
Import From IMS	Importing files from your IMS folders, documents must be loaded in IMS
Import From Folder	Import files from created folders
Upload files	Upload files from your computer (creates duplicates)
View Folder Report	View your template Folder report
Audit History	Shows the audit history of the file
Copy Folder Link	This allows you to copy the URL of the safety file
Add Trackable	

When creating a New Folder the user will be tasked with entering Folder Name and Folder Type.
As default users should use the : General Folder Type

Stage 2 – BUILD - Safety file Dashboard

Creating a new Folder, Clicking the 3 DOTS in the CURRENT FOLDER “Grey bar”, will open a dropdown, select “New Folder”. This will take you to the “Add Folder” card.

The 'Add Folder' card contains a 'Folder Name *' input field, a 'Select Folder Type' dropdown menu, a 'Critical' checkbox, and a 'File Types' information block. At the bottom are 'Cancel' and 'Add' buttons. Arrows point from the explanatory text boxes to these specific fields.

In the Folder name block, give a name to the first folder. You will start loading documents to this folder

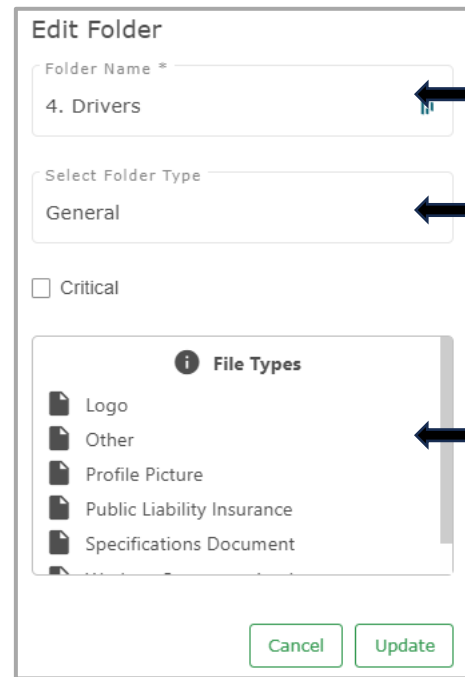
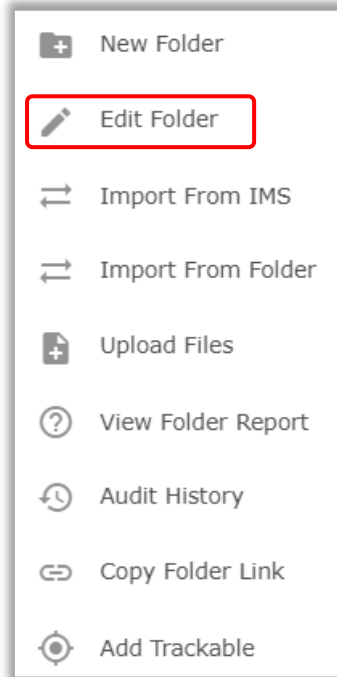
In the Select Folder Type block, select the type of files you will be loading, (there are 45 types), depending on your selection available file type will be display in File type block

Select “Critical” box if you want to give a score rating to your documents

NB: Select Folder Type = We no longer recommend using the “General type” as default for loading documents. Monitoring of your safety file is only possible if documents are loaded correctly

Stage 2 – BUILD - Safety file Dashboard

Creating a new Folder, Clicking the 3 DOTS in the CURRENT FOLDER “Grey bar”, will open a dropdown, select “New Folder”

A screenshot of the 'Edit Folder' form. It has a title 'Edit Folder'. Below it is a 'Folder Name *' field with the text '4. Drivers'. To the right of the text is a three-dot menu icon. Below that is a 'Select Folder Type' dropdown menu with 'General' selected. Below that is a checkbox labeled 'Critical'. At the bottom is a section titled 'File Types' with a list of file types: 'Logo', 'Other', 'Profile Picture', 'Public Liability Insurance', and 'Specifications Document'. At the bottom right are 'Cancel' and 'Update' buttons.

Edit the name you have selected in the previous step

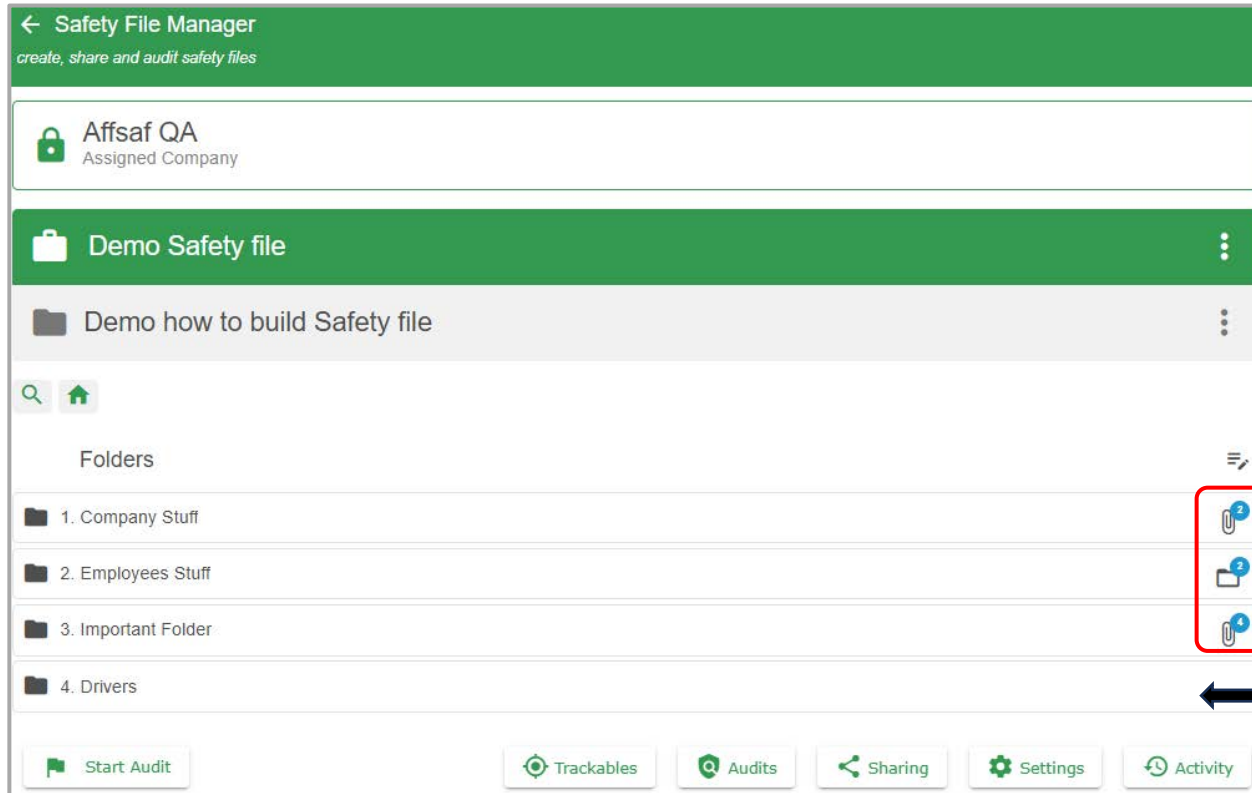
Change your selection to a different selection.

Add the type of file you want to load

NB: Every time you use a different “Folder type”. The file type will change to list the corresponding available “File Types”
NB: For monitoring of safety files, this needs to be in place. And the SOW as well

Stage 2 – BUILD - Safety file Dashboard

After the New Folder has been added, the dashboard will update to show New Folder and the user can click on the folder to open it up.



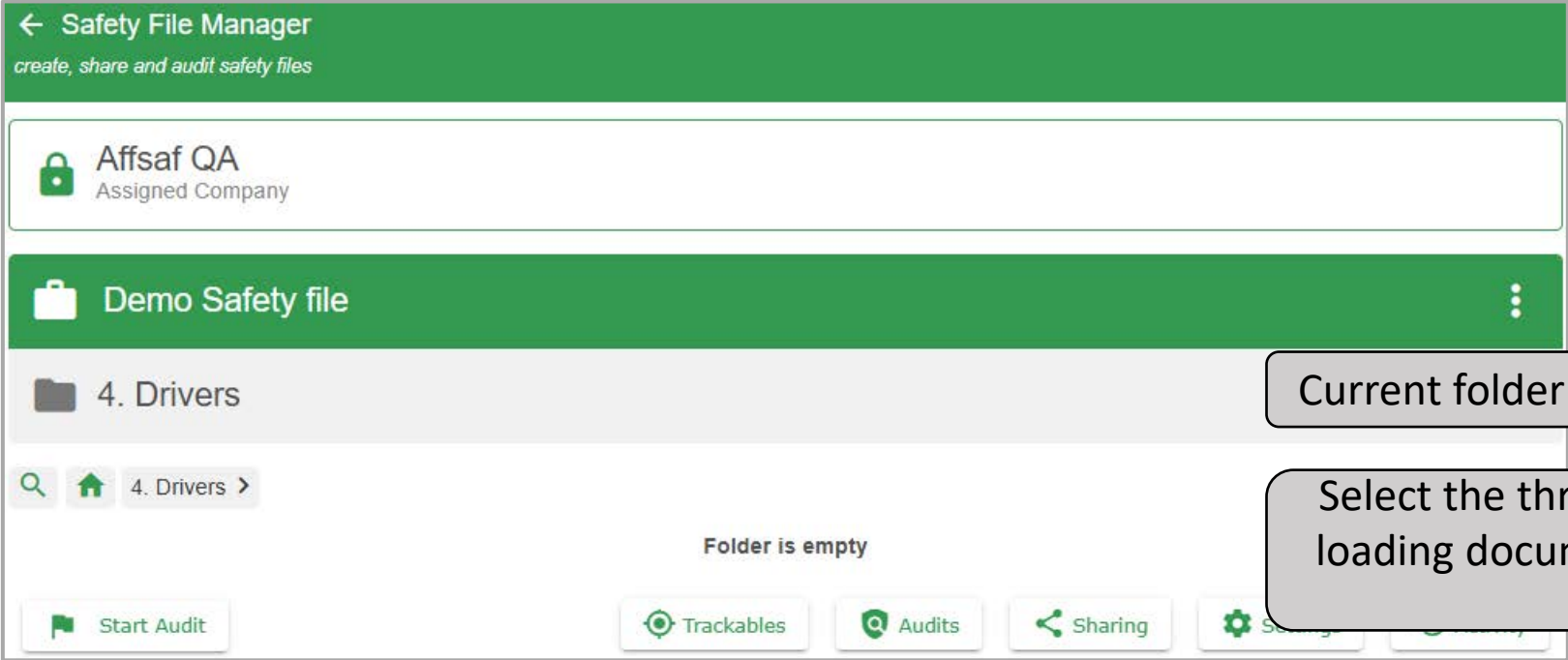
Folders containing files

New folder added called Drivers with no files

The user can then repeat the New Folder step to add a sub-folder and so on

Stage 2 – BUILD - Safety file Dashboard

After the New Folder has been selected, the dashboard will update to show New Folder “4. Drivers”



The screenshot shows the 'Safety File Manager' interface. At the top, a green header bar contains a back arrow, the title 'Safety File Manager', and the subtitle 'create, share and audit safety files'. Below this, a white box displays 'Affsaf QA' with a lock icon and the text 'Assigned Company'. A green bar labeled 'Demo Safety file' with a briefcase icon and a three-dot menu is visible. The main area shows a folder icon and the name '4. Drivers'. Below the folder name, there are search, home, and breadcrumb navigation icons. The text 'Folder is empty' is centered. At the bottom, there are buttons for 'Start Audit', 'Trackables', 'Audits', 'Sharing', and 'Settings'. Two callout boxes provide instructions: one points to the folder name '4. Drivers' with the text 'Current folder name changed to 4. Drivers', and the other points to the three-dot menu with the text 'Select the three dots “Grey bar” to start loading documents or sub folders to this folder'.

← Safety File Manager
create, share and audit safety files

Affsaf QA
Assigned Company

Demo Safety file

4. Drivers

Current folder name changed to 4. Drivers

Select the three dots “Grey bar” to start loading documents or sub folders to this folder

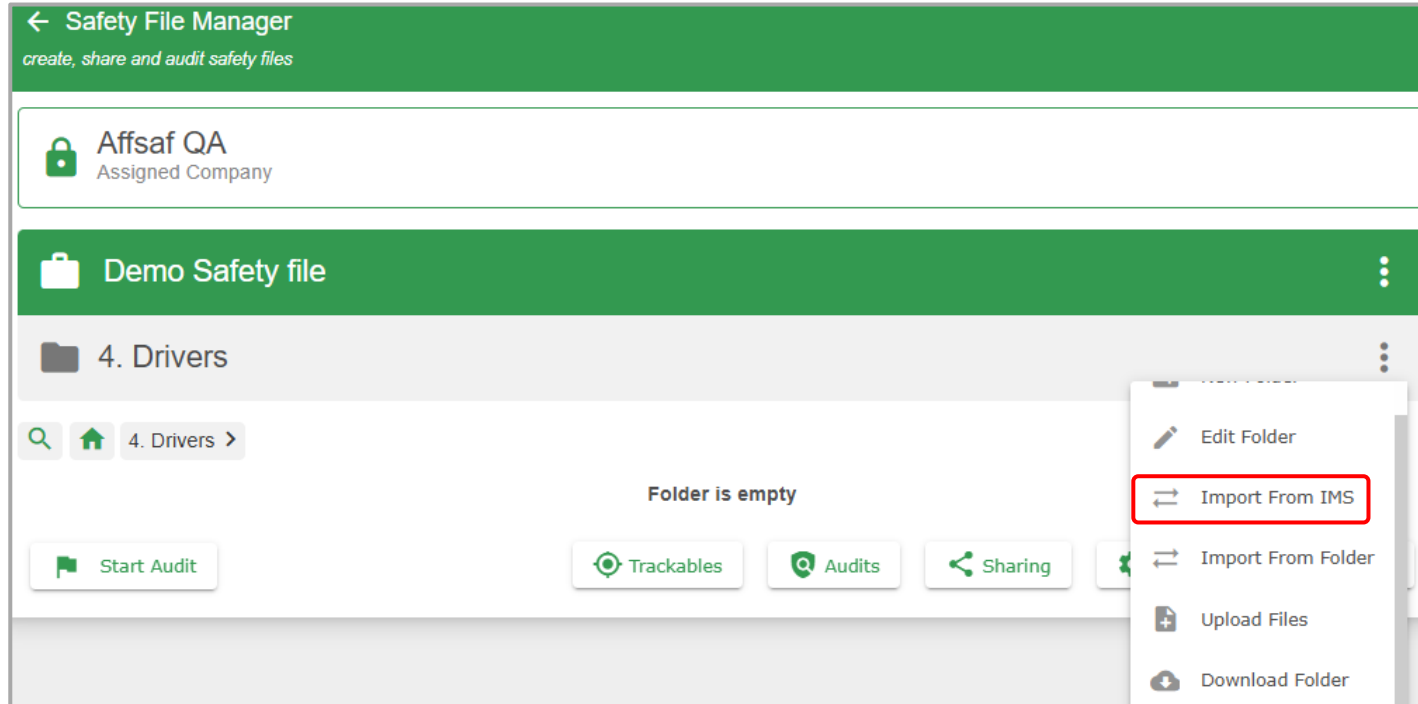
Folder is empty

Start Audit Trackables Audits Sharing Settings

The user can also repeat the steps to add a sub-folders under Drivers or import documents

Stage 2 – BUILD - Safety file Dashboard

Select Import from IMS to start adding files



Select import from IMS

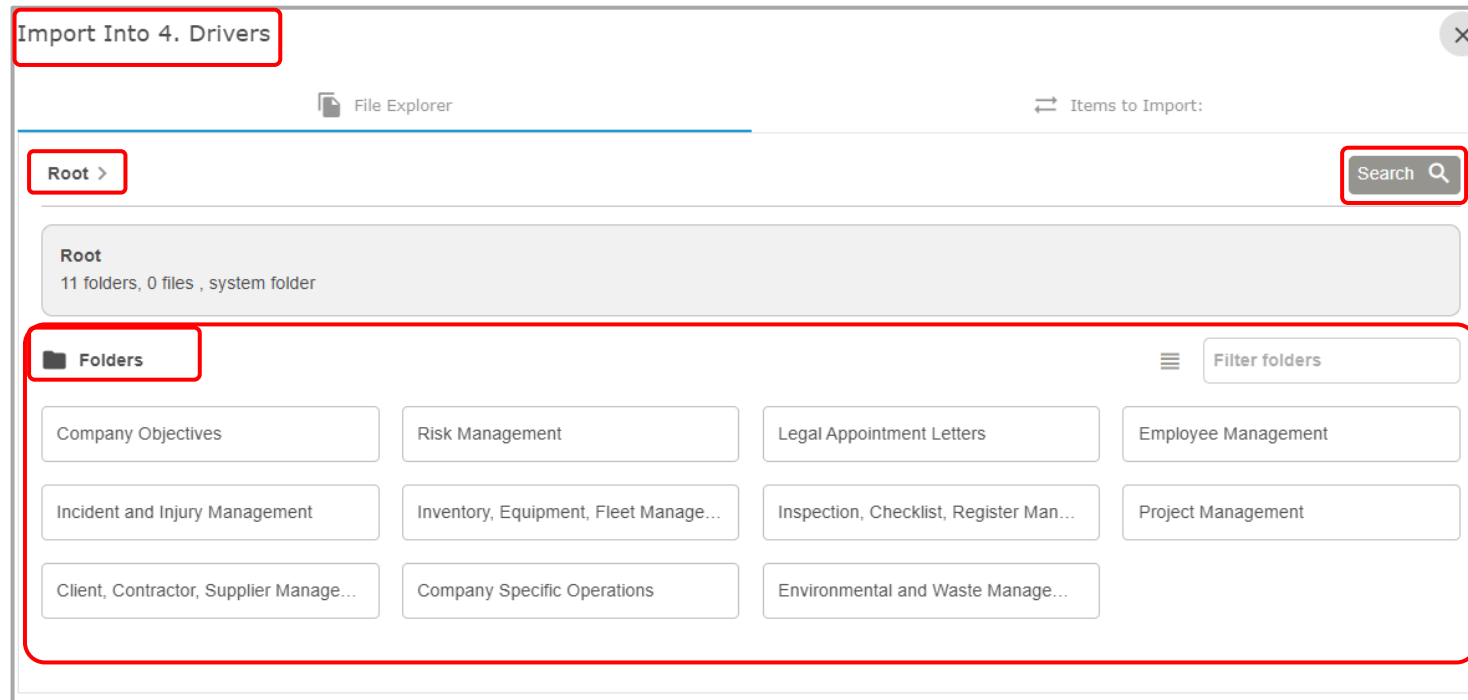
The user will be taken to the IMS folder main page. Please review the File Manager guide on “IMS” for more details. All the documents must be stored in the File Manager for easy sharing between several Safety files and when the file gets updated in the IMS then it will automatically update all the Safety files that contain this specific file (and the old one will stay in the safety file but shows archived).

Stage 2 – BUILD – Importing files from IMS

Once all the Folders and Sub-Folders have been created we can Populate the file with contents. These can either be documents already loaded to system (IMS).

Documents will
be loaded into
“4. Drivers”

Root:
Indicates the
path to the
documents
loaded in IMS



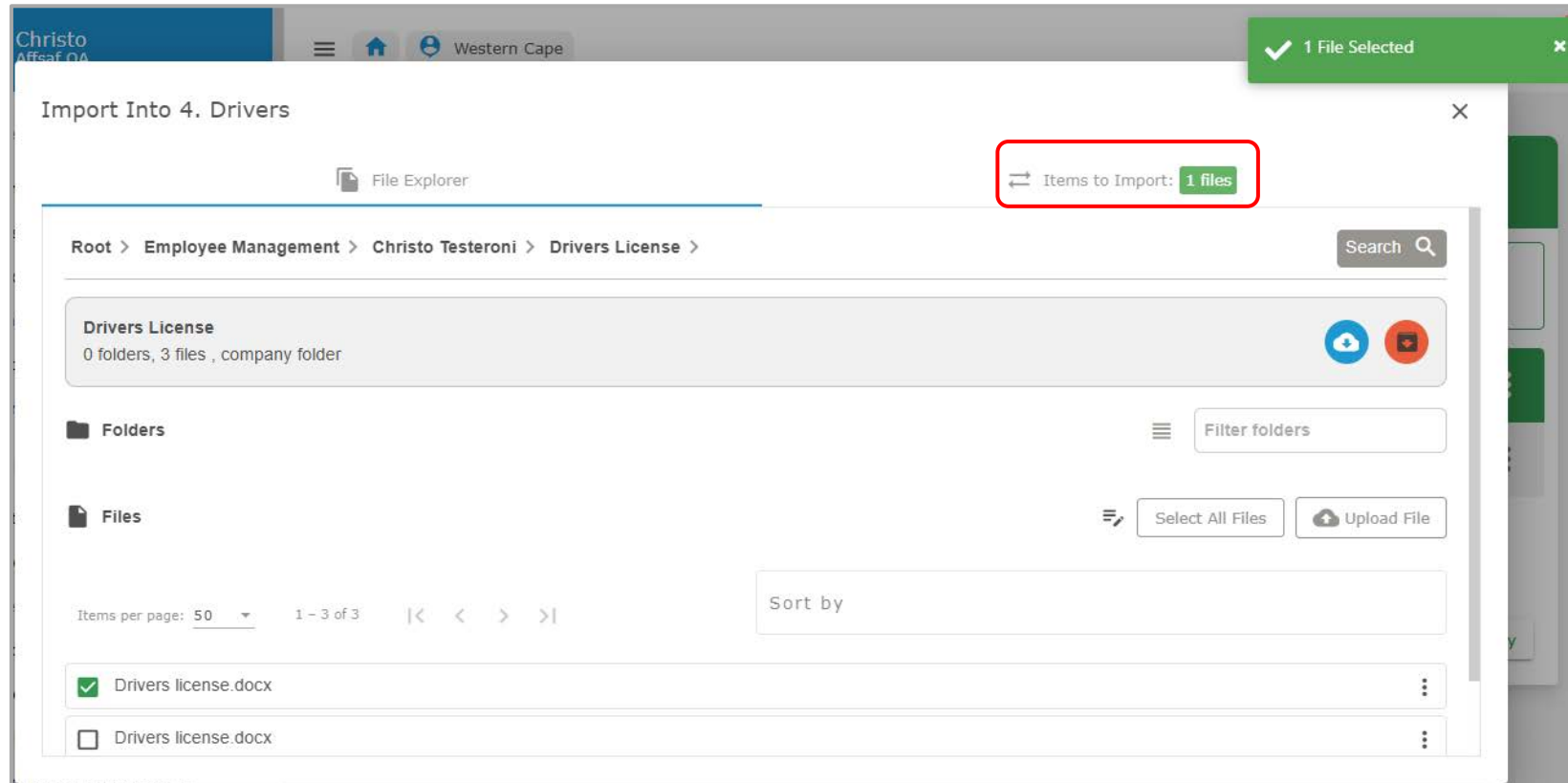
Search: for
documents if
you know the
name of the
document

Folders:
IMS Folder on
Safety 360

*No duplicates can be imported from IMS, even in different folders/subfolders

Stage 2 – BUILD – Importing files from IMS

Importing Drivers license for Christo Testeroni from IMS



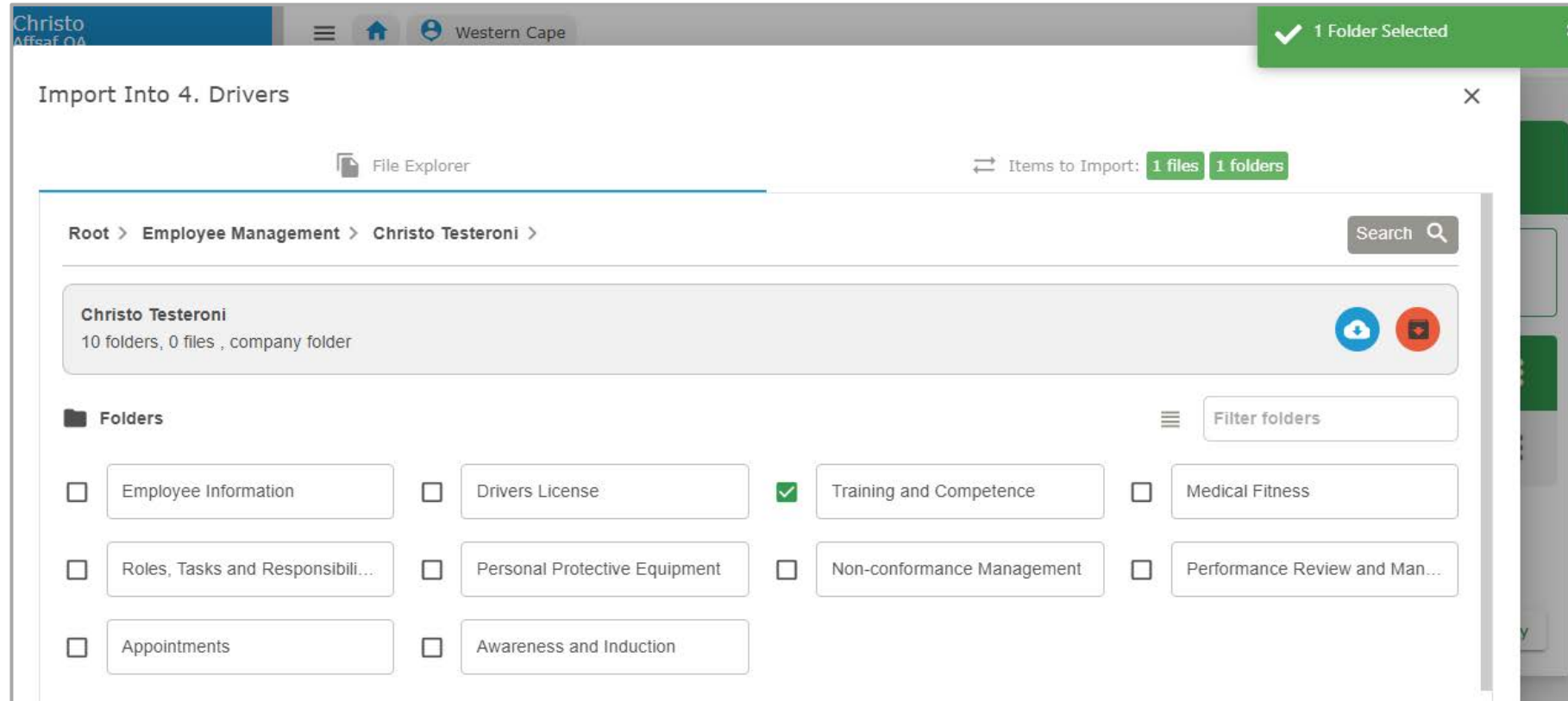
Green tick indicates selected file

Select the Item to import button to upload the document

*No duplicates can be imported from IMS, even in different folders/subfolders.

Stage 2 – BUILD – Importing folders from IMS

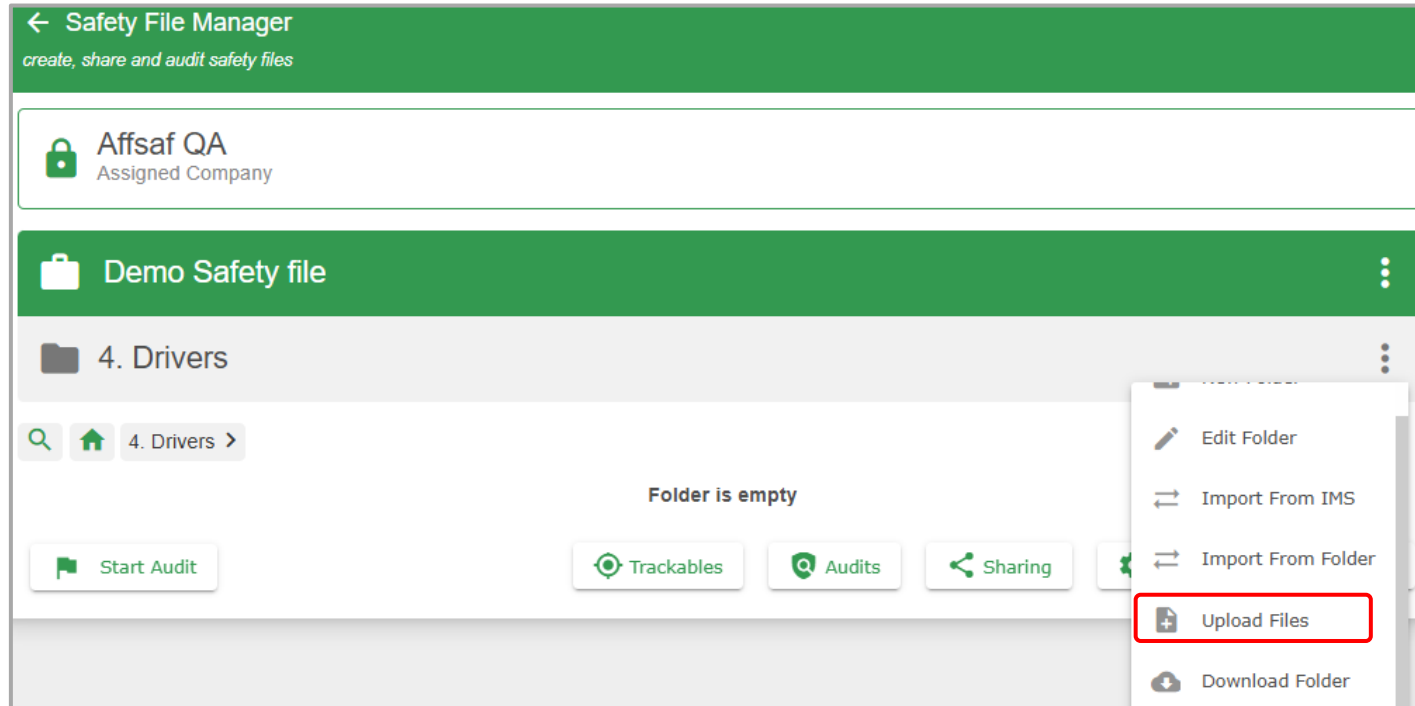
Import From IMS (Folder)



Users can also import entire sub-folders by clicking the box next to the folder. This will import **ALL** content included in the sub-folders.

Stage 2 – BUILD – Uploading files

Import documents using the Upload files feature



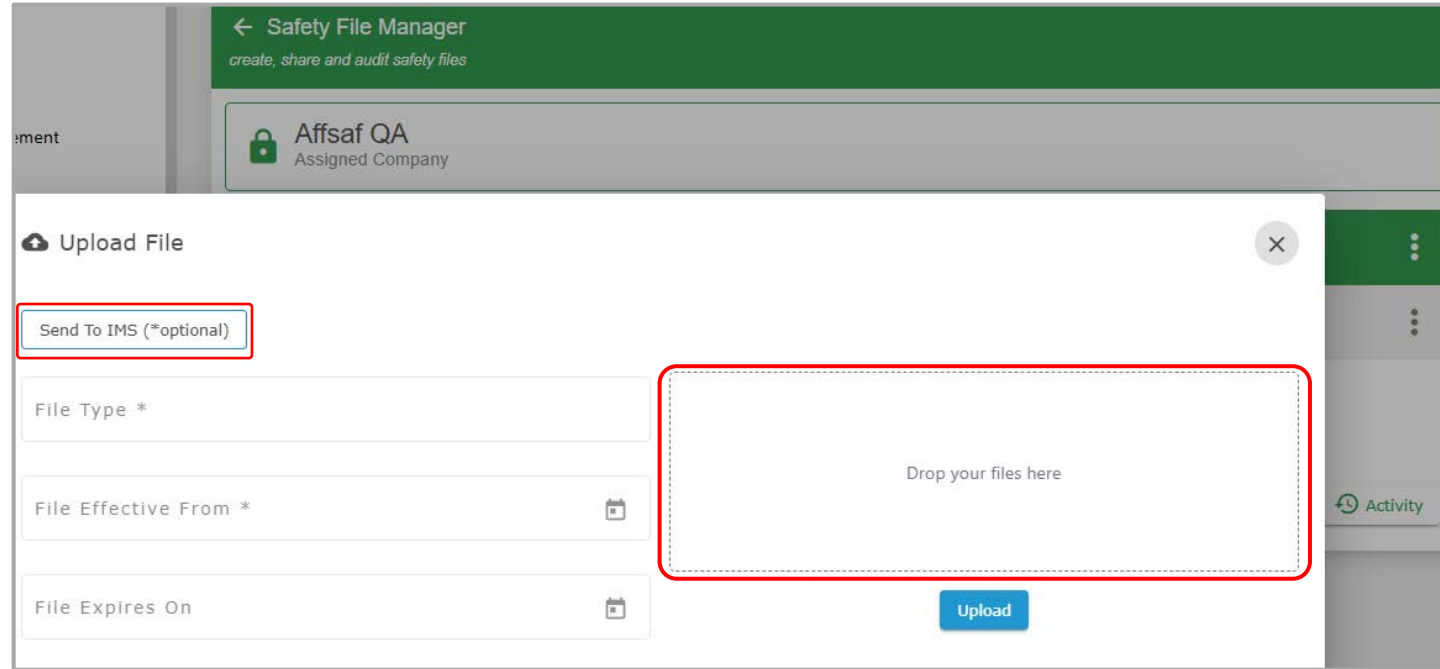
Select Upload files

The user will be taken to the PC's File Manager.

Kindly note that if a file is uploaded from the File Manager (IMS), then the system will populate it or update the file in the different safety files when the file is changed. For this process to automatically take place, the file must come from the IMS (Import from IMS) and not the user's PC (Upload files). To get this correct, save the file in the File Manager (IMS) first and then link it to the Safety file or Safety files.

Stage 2 – BUILD - Safety file Dashboard

Selecting Upload file from the menu will open this page



Select a file type
for your document.

File effective from
date

Expire date for the
document

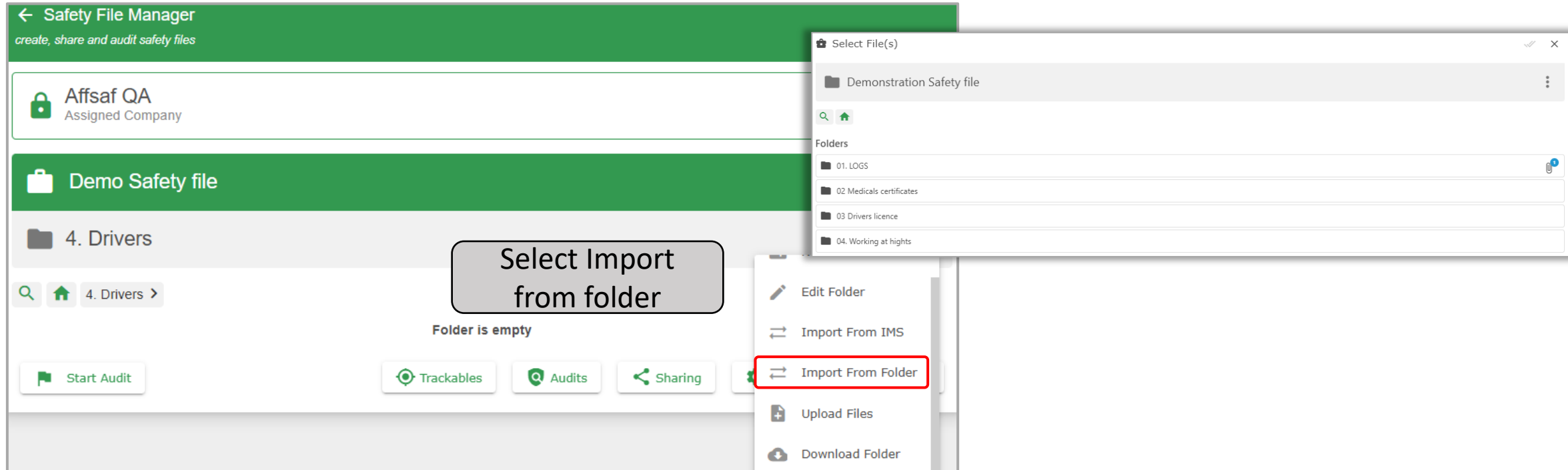
Drag and drop file
in the box or
selecting (click) the
box will open file
manager on your
PC

You can opt to also send the file to your IMS folder , tick the box Infront of the folder were you want to store the document.

If you upload the file without selecting to store it in IMS it will only be visible in this safety file

Stage 2 – BUILD – Uploading files

Import documents to my folder from the same Safety File. It stores a duplicate of the same document

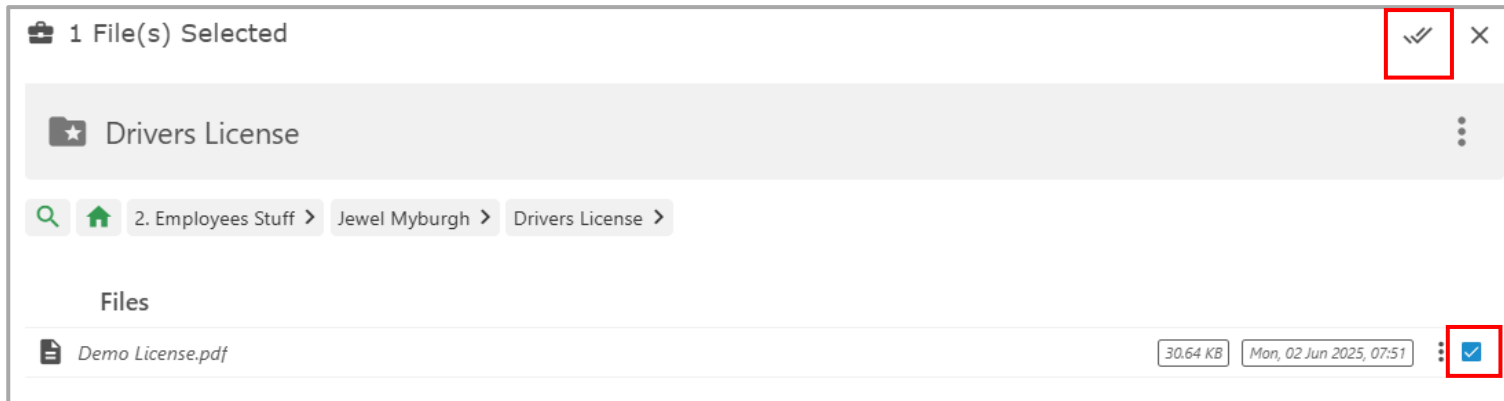
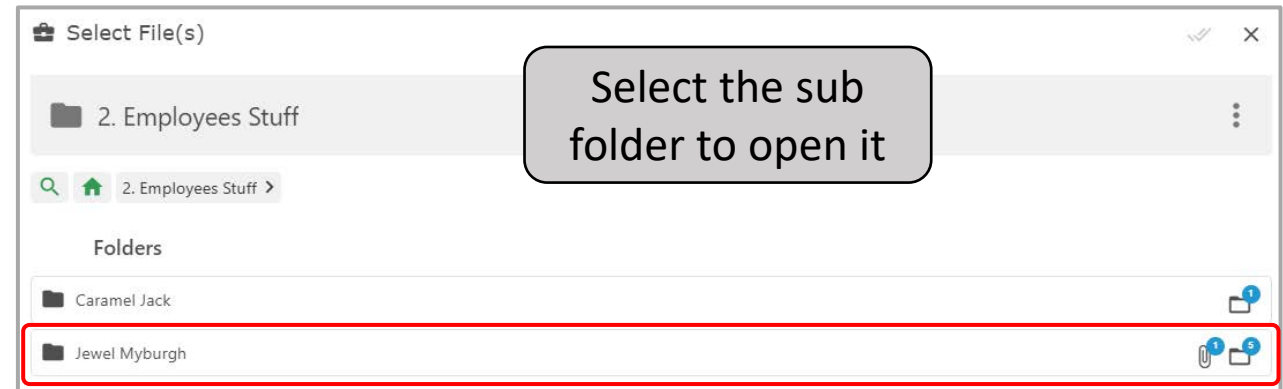
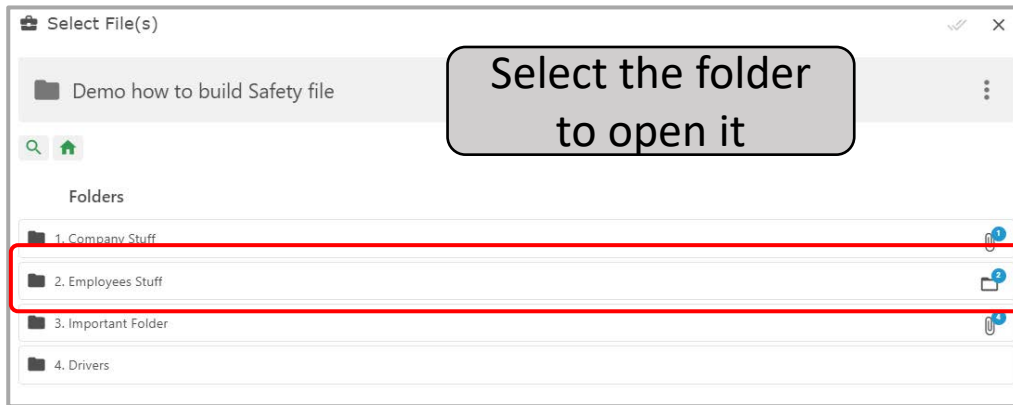


The screenshot displays the 'Safety File Manager' interface. At the top, a green header bar contains a back arrow, the text 'Safety File Manager', and the subtitle 'create, share and audit safety files'. Below this, a card for 'Affsaf QA' (Assigned Company) is visible. The main content area shows a 'Demo Safety file' section with a folder icon and the text '4. Drivers'. Below the folder name, there are search and home icons, and a breadcrumb '4. Drivers >'. A message 'Folder is empty' is displayed. At the bottom of this section are buttons for 'Start Audit', 'Trackables', 'Audits', and 'Sharing'. A context menu is open over the '4. Drivers' folder, showing options: 'Edit Folder', 'Import From IMS', 'Import From Folder' (highlighted with a red box), 'Upload Files', and 'Download Folder'. An overlay window titled 'Select File(s)' is also visible, showing a 'Demonstration Safety file' and a list of folders: '01. LOGS', '02 Medicals certificates', '03 Drivers licence', and '04. Working at heights'.

The user will be taken to the “Select File” page. The user can select files from other folders to load into the current folder. Documents are duplicated. Example medicals can be loaded in WAH folder and Electrical

Stage 2 – BUILD – Uploading files

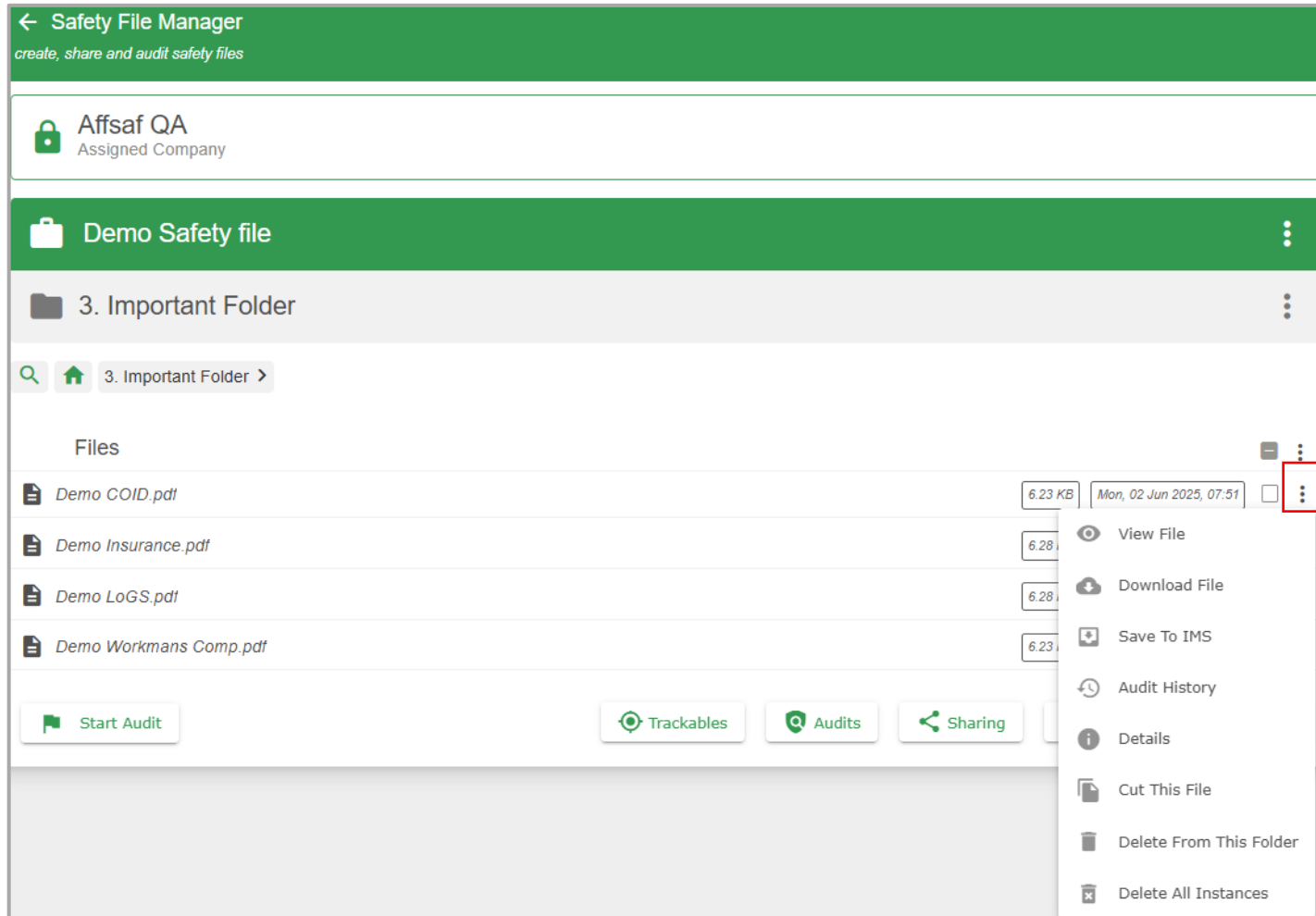
This action opens your current Safety file folders, select the folder you want to open



The document will be loaded to your, current folder

Stage 2 – BUILD - Safety file Dashboard

Reviewing documents loaded in your Safety file



The screenshot shows the 'Safety File Manager' interface. At the top, there's a green header with a back arrow and the text 'Safety File Manager' and 'create, share and audit safety files'. Below this, a section for 'Affsaf QA' (Assigned Company) is visible. The main area shows a 'Demo Safety file' folder, which contains a sub-folder '3. Important Folder'. Inside this folder, there's a list of files. The first file, 'Demo COID.pdf', is highlighted. To its right, there's a three-dot menu icon, which is highlighted with a red box. A dropdown menu is open for this file, showing options: 'View File', 'Download File', 'Save To IMS', 'Audit History', 'Details', 'Cut This File', 'Delete From This Folder', and 'Delete All Instances'. At the bottom of the interface, there are buttons for 'Start Audit', 'Trackables', 'Audits', and 'Sharing'.

Select the three dots next to a document, will open a dropdown

Stage 2 – BUILD - Safety file Dashboard

By clicking the 3 DOTS next to the document it will open a dropdown menu

	View File
	Download File
	Save To IMS
	Audit History
	Details
	Cut This File
	Delete From This Folder
	Delete All Instances

Type	Description
View File	Users can view pdf/jpeg/png files without downloading
Download File	Download a copy of the document, i.e. Word doc
Save To IMS	Allows to send file to the IMS folder
Audit History	The Auditor will see notes he made regarding the document
Details	Indicates details relating to the document: name, Date created, linked to, Expiry date.
Cut This File	The selected files will be moved from this folder to the desired folder and pasted in the selected folder
Delete From This Folder	Remove the document from the current folder
Delete All Instances	Completely remove the document from the current safety file and any other safety files.

The population and content of Files can be continually monitored and managed through **My Safety Files**.



SAFETY 360 Elite

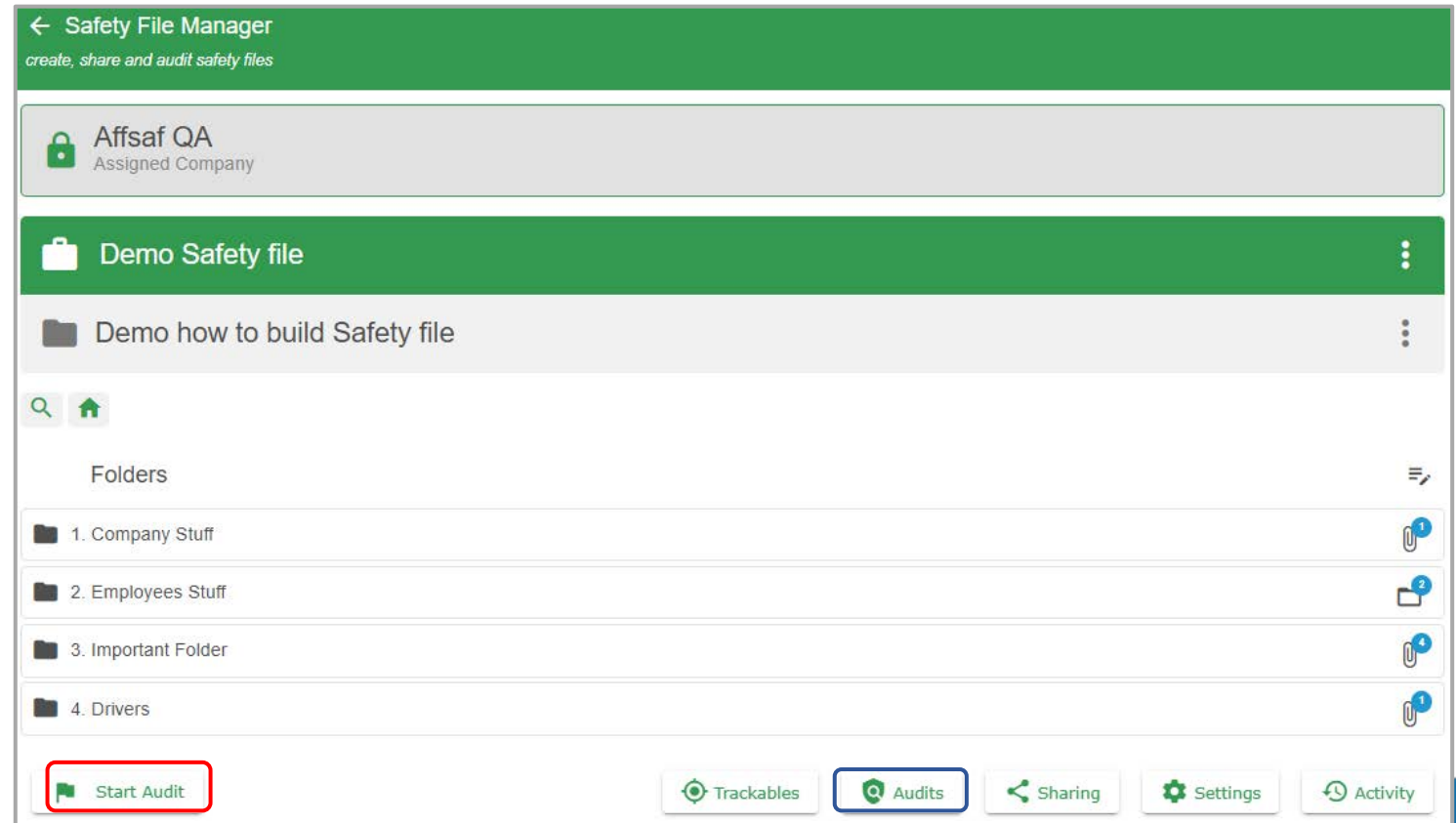
Stage 3

Stage 3 - VERIFICATION

This information guide will assist the user with Auditing or Verifying a File and its contents. Once all **folders/subfolders** have been created and all documents have been loaded either via **Import from IMS** or **Upload Files**, the user can proceed to Verification phase (**optional**).

This phase can include Internal **Sharing** (within your company) and **Auditing**, either done by you or anyone from your company.

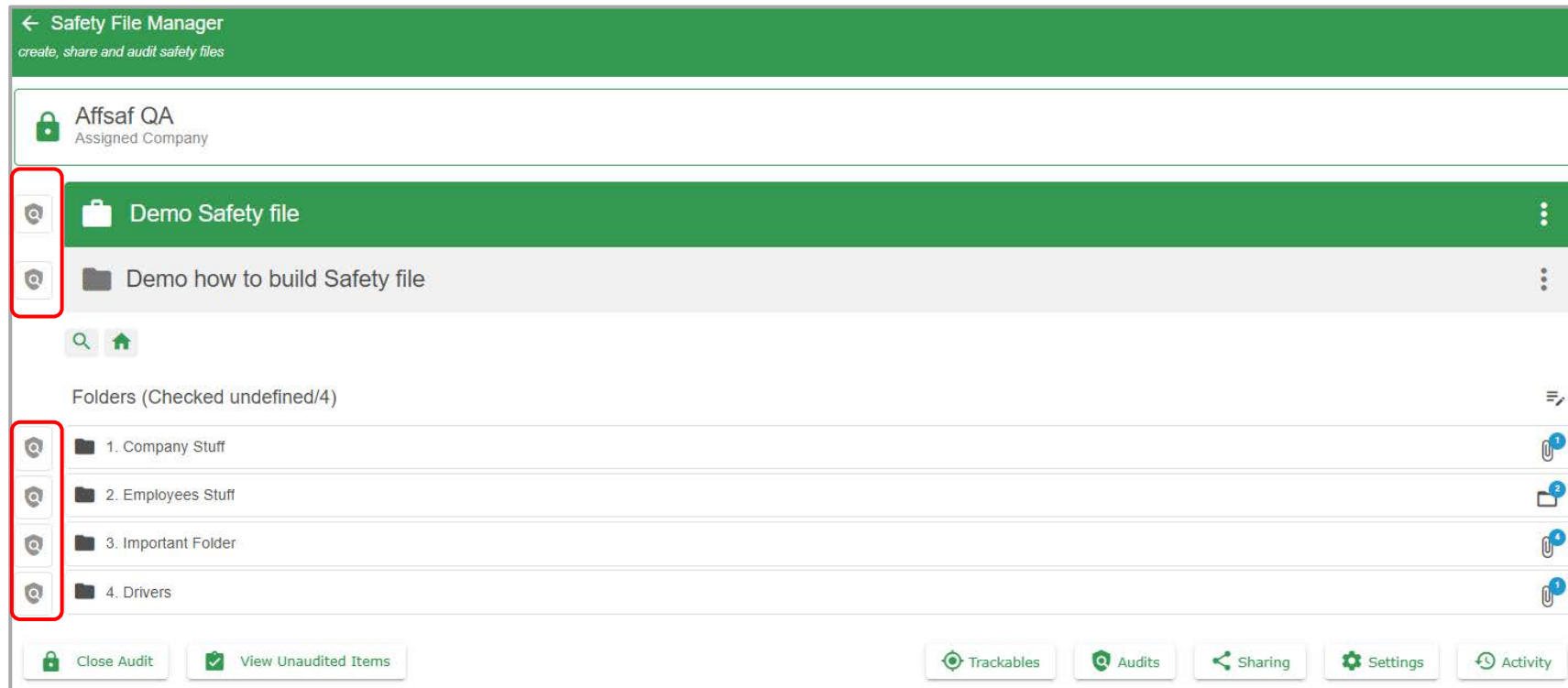
If the user is ready to start an audit, they can click the **Start Audit** button in the **bottom left** of the main file dashboard (Internal Audit)



Audit reports can be viewed under [Audits](#)

Stage 3 – VERIFICATION – Auditing folders

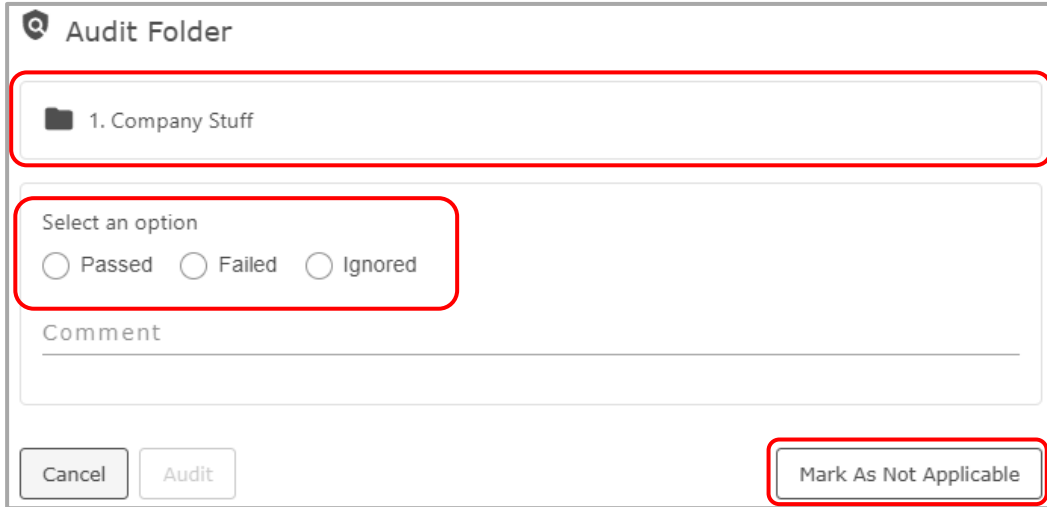
Selecting the start Audit opens a dropdown where you are required to select the region, inspection area, and expire date of the Audit. The next step will open the Audit screen, all headings, folders, and subfolders can be audited.



Indicates headings, folders and subfolder that can be audited. Click on  to start auditing content

Stage 3 – VERIFICATION - Audits

This icon will be present on **ALL** folders / sub-folders / document. Clicking the Audit Icon will open the Audit selector:



The screenshot shows a dialog box titled "Audit Folder". It contains a folder selection area with "1. Company Stuff" highlighted. Below this is a "Select an option" section with three radio buttons: "Passed", "Failed", and "Ignored". A "Comment" text box is located below the radio buttons. At the bottom, there are three buttons: "Cancel", "Audit", and "Mark As Not Applicable". Red boxes highlight the folder selection area, the "Select an option" section, and the "Mark As Not Applicable" button.

This will show the current folder / file that you are checking as well as audit history (Comment), if any exist.

Here users can select status for item they are auditing.

Passed



Failed



Ignored



Files can also be marked as **Not Applicable**, and this will affect the scoring at the end off the audit.

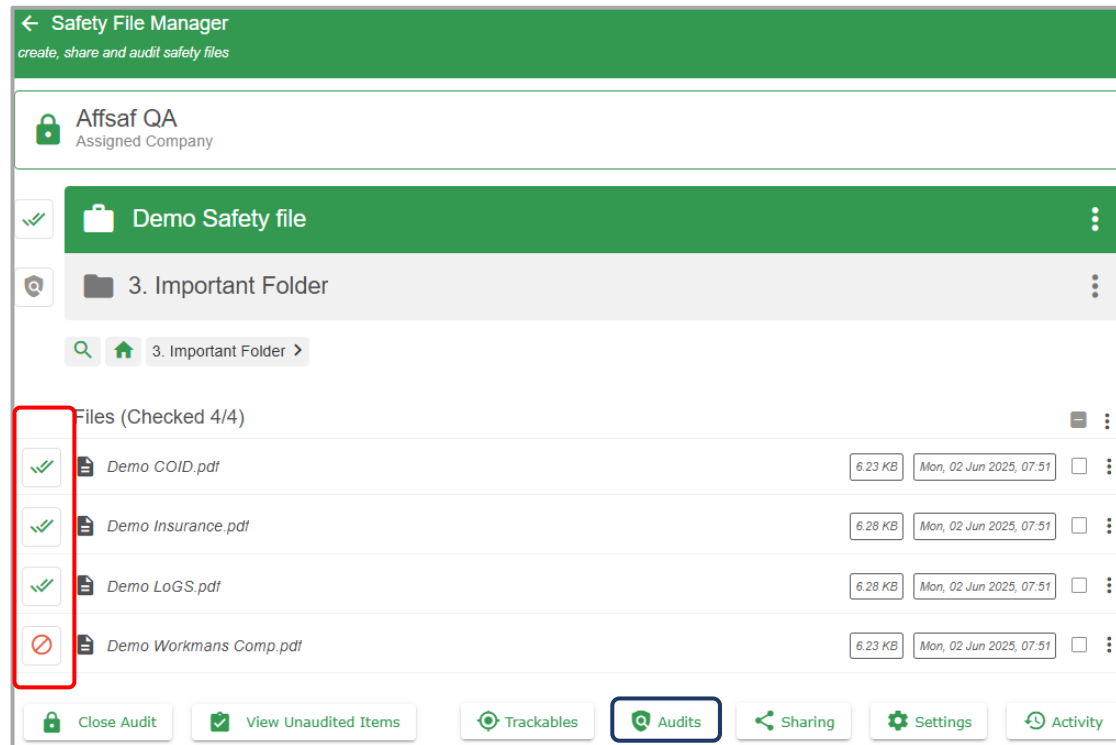
Once done, the **Audit** will become available to select this will store your selection and comments

Auditors can provide comments and add recommendations in Comment box

Stage 3 – VERIFICATION - Auditing each folder

Through Auditing each folder / sub-folder and each file, the auditor is building both a roadmap for themselves as well as action plan for auditee to correct.

The primary goal of Safety 360 Elite, Safety File Auditor is to ensure there is a audit status for **EVERY FOLDERS & SUB FOLDER AS WELL AS EVERY DOCUMENT.**



Status of
folders
audited.

All findings and comments are available under the **Audits** TAB at the bottom of the main file dashboard.

Stage 3 - VERIFICATION

Audit Reports

Company Audits

Affsaf QA Audit (Demo Safety file)

Ongoing

Started Mon, 09 June 2025

Expiry: Tue, 10 June 2025

Auditor

Christo Testeroni

Safety File

Passed

Note

Please view scores on audit report

CSV Report

PDF Report

Set Expiry Date

Re-assign Audit

View Report

Once the self assessment audit is complete, the file can be shared internally or sent to non-system users via external sharing.

Audits can also be **Re-assigned** internally, meaning one user can send the audit to another users profile. **Users can also export audit report data to CSV or PDF.**

Stage 3 – VERIFICATION - Audit Report

The Audit Report itself will open in a new tab in your browser. This will enable system users to view the Report in one tab and manage the file for corrections in another.

Audit Reports

Company Audits

Playground Audit (Demonstration Safety file)

Closed

Started Tue, 11 November 2025

Closed Tue, 11 November 2025

Expiry: Thu, 13 November 2025

Auditor

Christo DemoMan

Workspace

Gauteng, Pretoria, General Inspection Area

Safety File

Auditing

Note

Please view scores on audit report

CSV Report

PDF Report

Set Expiry Date

Re-open Audit

View Report

Playground Audit (Demonstration Safety file)

Closed

Started Mon, 10 November 2025

Closed Mon, 10 November 2025

Expiry: Tue, 11 November 2025

Auditor

Christo DemoMan

Workspace

Gauteng, Pretoria, General Inspection Area

Safety File

Auditing

Note

Please view scores on audit report

CSV Report

PDF Report

Set Expiry Date

Re-open Audit

View Report

Stage 3 – VERIFICATION - Audit Report

The Audit Report itself will open in a new tab in your browser.

Playground Audit (Demonstration Safety file)

Closed

Started Tue, 11 November 2025

Closed Tue, 11 November 2025

Expiry: Thu, 13 November 2025

Auditor	Christo DemoMan
Workspace	Gauteng, Pretoria, General Inspection Area
Safety File	Auditing
Folders	4/5 (80%)
Files	0/11 (0%)

CSV Report

PDF Report

Set Expiry Date

Demonstration Safety file

Auditing

Started Audit

Tue, 11 November 2025

Show history

Demonstration Safety file

Auditing

Show history

01. LOGS

Passed

Tue, 11 November 2025

Show history

02 Medicals certificates

Passed

Tue, 11 November 2025

Show history

03 Drivers licence

Passed

Tue, 11 November 2025

Show history

04. Working at heights

Passed

Tue, 11 November 2025

Show history

This will enable system users to view the Report in one tab and manage the file for corrections in another.



SAFETY 360 Elite

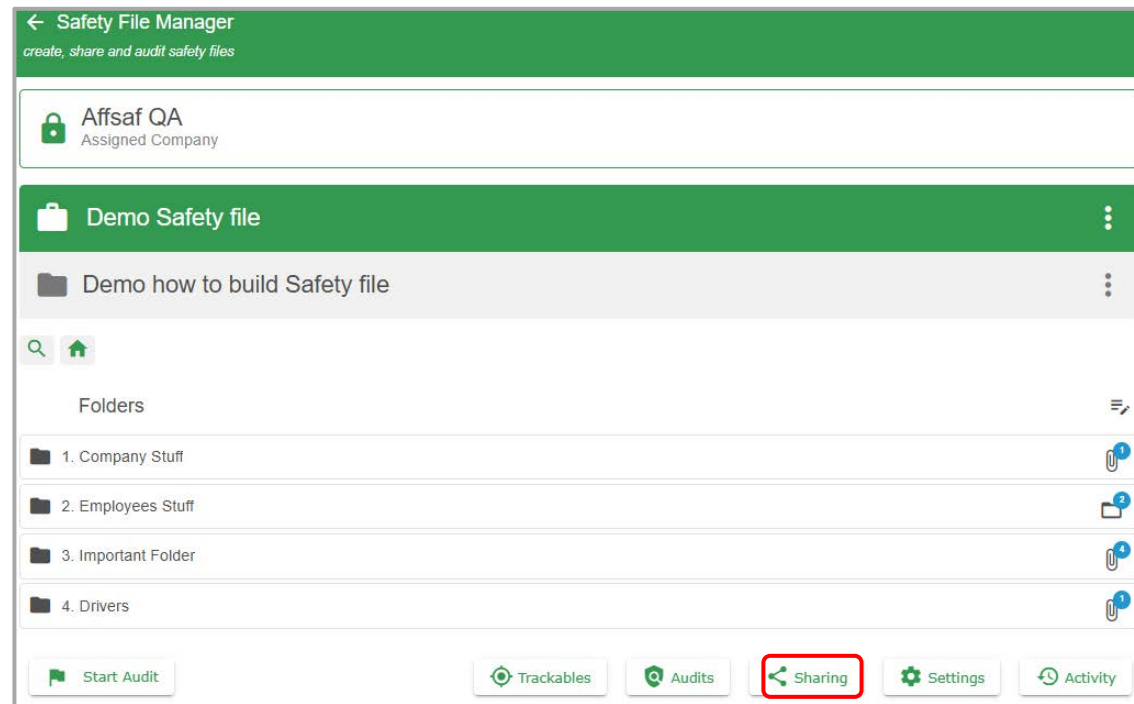
Stage 4

Stage 4 - SHARING

This information guide will assist the user with sharing Files both Externally and internally. There is a separate manual for External sharing for more details.

All File types on the Safety 360 Elite Safety File feature are built around security and data integrity.

By default only the **creator** of a file can access it through My Safety Files. To all other users, including Control users, it will be hidden until permission to view/manage/edit has been given.

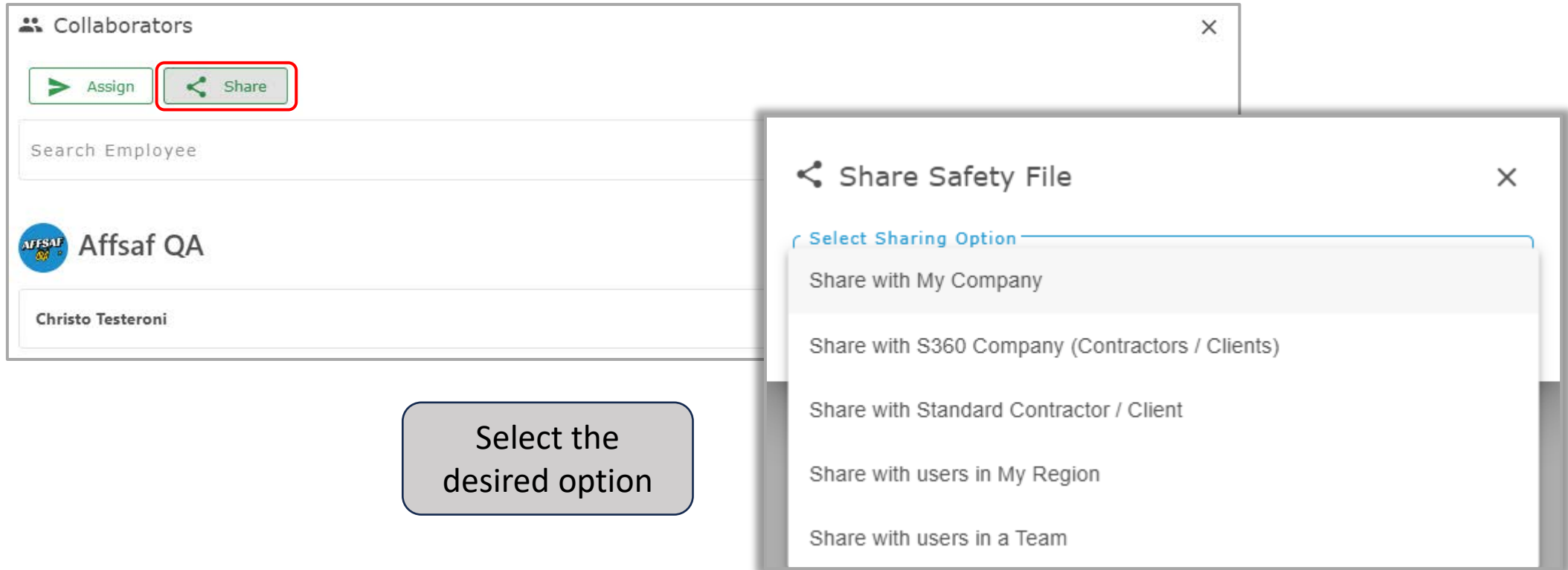


This permission is granted through the **Sharing** tab at the bottom of the main file dashboard:

Stage 4 - SHARING

Clicking the **Sharing** icon will open Safety File Collaborators list. These are people who have access to this file.

There are 5 types of sharing: Users from your Organisation, S360 COMPANY (Contractors and Clients), and STANDARD (via email), You can share within different regions of your company, or specific users in a team.



The screenshot displays the 'Collaborators' interface. At the top, there are two buttons: 'Assign' and 'Share'. The 'Share' button is highlighted with a red rectangle. Below the buttons is a search bar labeled 'Search Employee'. Underneath the search bar, there is a section for 'Affsaf QA' with a profile picture and the name 'Christo Testeroni'. A callout box titled 'Share Safety File' is open, showing a list of sharing options. A grey box highlights the first option, 'Share with My Company'. Below it are other options: 'Share with S360 Company (Contractors / Clients)', 'Share with Standard Contractor / Client', 'Share with users in My Region', and 'Share with users in a Team'. A grey button with the text 'Select the desired option' is positioned below the 'Collaborators' window.

Collaborators

Assign Share

Search Employee

Affsaf QA

Christo Testeroni

Select the desired option

Share Safety File

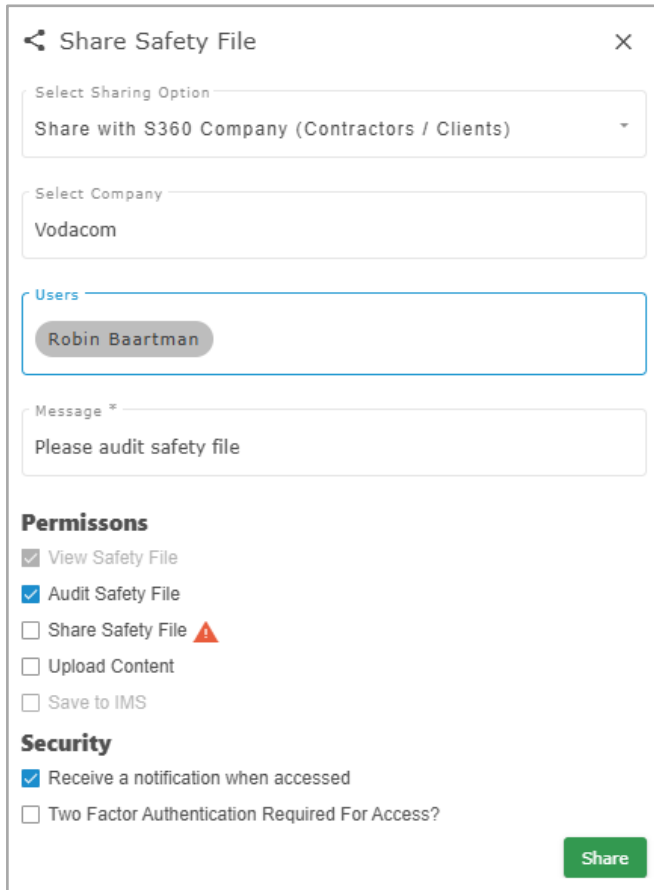
Select Sharing Option

- Share with My Company
- Share with S360 Company (Contractors / Clients)
- Share with Standard Contractor / Client
- Share with users in My Region
- Share with users in a Team

Stage 4 - SHARING

Selecting the share button you will need to complete the details of the receiving party

S360 Company (via system)



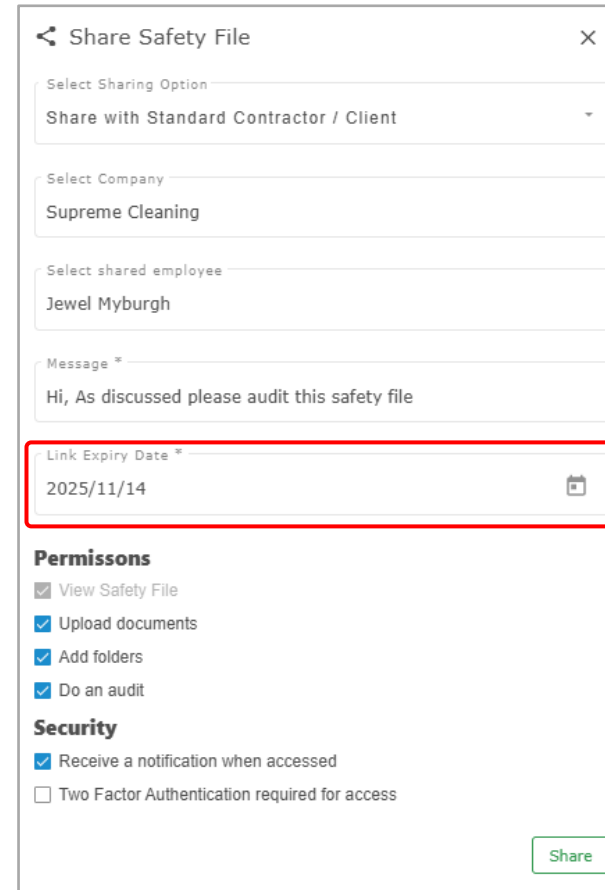
The screenshot shows the 'Share Safety File' dialog box. At the top, there's a 'Select Sharing Option' dropdown set to 'Share with S360 Company (Contractors / Clients)'. Below it is a 'Select Company' field with 'Vodacom' selected. A 'Users' section contains a button for 'Robin Baartman'. A 'Message *' field has the text 'Please audit safety file'. The 'Permissions' section includes checkboxes for 'View Safety File' (checked), 'Audit Safety File' (checked), 'Share Safety File' (unchecked with a warning icon), 'Upload Content' (unchecked), and 'Save to IMS' (unchecked). The 'Security' section has 'Receive a notification when accessed' (checked) and 'Two Factor Authentication Required For Access?' (unchecked). A green 'Share' button is at the bottom right.

-Users can select companies that have their own system, as well as specific users.

-There is a mandatory Message box to give instructions.

-These are followed by permissions that must be given to allow certain actions.

Standard Contractors (via email)



The screenshot shows the 'Share Safety File' dialog box. At the top, there's a 'Select Sharing Option' dropdown set to 'Share with Standard Contractor / Client'. Below it is a 'Select Company' field with 'Supreme Cleaning' selected. A 'Select shared employee' field has 'Jewel Myburgh' selected. A 'Message *' field has the text 'Hi, As discussed please audit this safety file'. A 'Link Expiry Date *' field is highlighted with a red box, showing '2025/11/14' with a calendar icon. The 'Permissions' section includes checkboxes for 'View Safety File' (checked), 'Upload documents' (checked), 'Add folders' (checked), and 'Do an audit' (checked). The 'Security' section has 'Receive a notification when accessed' (checked) and 'Two Factor Authentication required for access' (unchecked). A green 'Share' button is at the bottom right.

- Same as the S360 Company adding, the only difference being the user must set a expiry date for access to the file.

- Recipients of these files cannot share them with other persons/company's.

- You can also tick the box to receive notifications when your safety file is opened by the 3rd party



Sharing a Contractor File (see separate manual for more details - Safety Files External)

From there we are taken to the Share page. Here you will add all the required details regarding sharing.

The screenshot shows a 'Share Safety File' form with the following fields and sections:

- Select Sharing Option:** A dropdown menu with 'Share with Standard Contractor / Client' selected.
- Select Company:** A text input field.
- Message *:** A text input field.
- Link Expiry Date *:** A date picker field.
- Permissions:**
 - ☒ View Safety File
 - ☐ Upload documents
 - ☐ Add folders
 - ☐ Do an audit
- Security:**
 - ☒ Receive a notification when accessed
 - ☐ Two Factor Authentication required for access
- Share:** A green button at the bottom right.

Annotations with arrows point to the following fields:

- Select Company:** Select the company you wish to share the file with here. If not on the list, go to the Contractor page
- Message *:** Add a custom message here. This is a mandatory field
- Link Expiry Date *:** Set the link expiry date here. This will restrict access
- Permissions:** Here you can specify the rules linked to permissions
- Security:** Here you can specify the rules linked to security

Contractor File – Sharing - Permissions

The relevant permissions and Security are explained below:

Permission	Description
View	Enable the recipient to view the file only no changes can be made
Upload Files	Enable the recipient to upload files from his device
Add Folders	Enable the recipient to alter the layout of the safety file by adding folders
Do an Audit	Enable the recipient to carry out Audits on the safety file

Security	Description
Receive a notification when accessed	Click this button if the sender wants to know when the receiver is accessing the file
2FA for Access	Allows for two-factor Authentication in proofs security

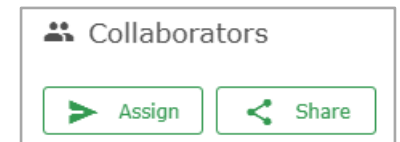
Stage 2 - SHARING

Very important to remember that safety files are not accessible by anyone!

By default, only the creator of a file will have access. They must first share the file with other users (internally or externally) to gain access. The Collaborators list (under the Sharing TAB) will show everyone who has access



If a users name appears on this list, they will have access (in one way or another based on permission). Only the Assigned company will be able to work on the Safety file. 



If their name is not on the list, they wont have access. User access can be revoked by Creator by clicking on user entry and selecting **REVOKE**, there is also a bulk REVOKE option.



Stage 4 – SHARING - 2 VITAL RULES WHEN SHARING FILES:

1. If the person you are sharing with has a Safety 360 Elite login, use INTERNAL SHARING. If the person you are sharing the file with does not have a Safety 360 Elite login, use EXTERNAL SHARING
2. Once a file has been shared, it has been shared. Sharing happens only once, from there, files follow the Assign VS Return process.

There are some statuses that can be assigned to Files shared both INTERNALLY and EXTERNALLY.

[Assigned](#) [Creator](#) [Content](#) [Share](#) [Audit](#) [View](#)

Type	Description
Assigned	The user that has this role is in charge, they can manage/edit/audit. Others cannot.
Creator	The user that originally created the file, by default only they have access.
Content	Allows users to manage content (upload/remove).
Share	Allows users to share the file with other parties.
Audit	Allows users to audit the safety file, each user can have multiple audits.
View	Allows a person to see and access files and content.

Stage 4 - SHARING

If the person you are sharing with, **has a Safety 360 Elite login, use INTERNAL SHARING.**

INTERNAL SHARING PERMISSIONS

Permissions

- ☒ View Safety File
- ☐ Audit Safety File
- ☐ Share Safety File 
- ☐ Upload Content
- ☐ Save to IMS

Security

- ☐ Receive a notification when accessed
- ☐ Two Factor Authentication Required For Access?



The person receiving the file can share it with anyone and update permissions.

If the person you are sharing the file with **does not have a Safety 360 Elite login, use EXTERNAL SHARING.**

EXTERNAL SHARING PERMISSIONS

Permissions

- ☒ View Safety File
- ☐ Upload documents
- ☐ Add folders
- ☐ Do an audit

Security

- ☒ Receive a notification when accessed
- ☐ Two Factor Authentication required for access

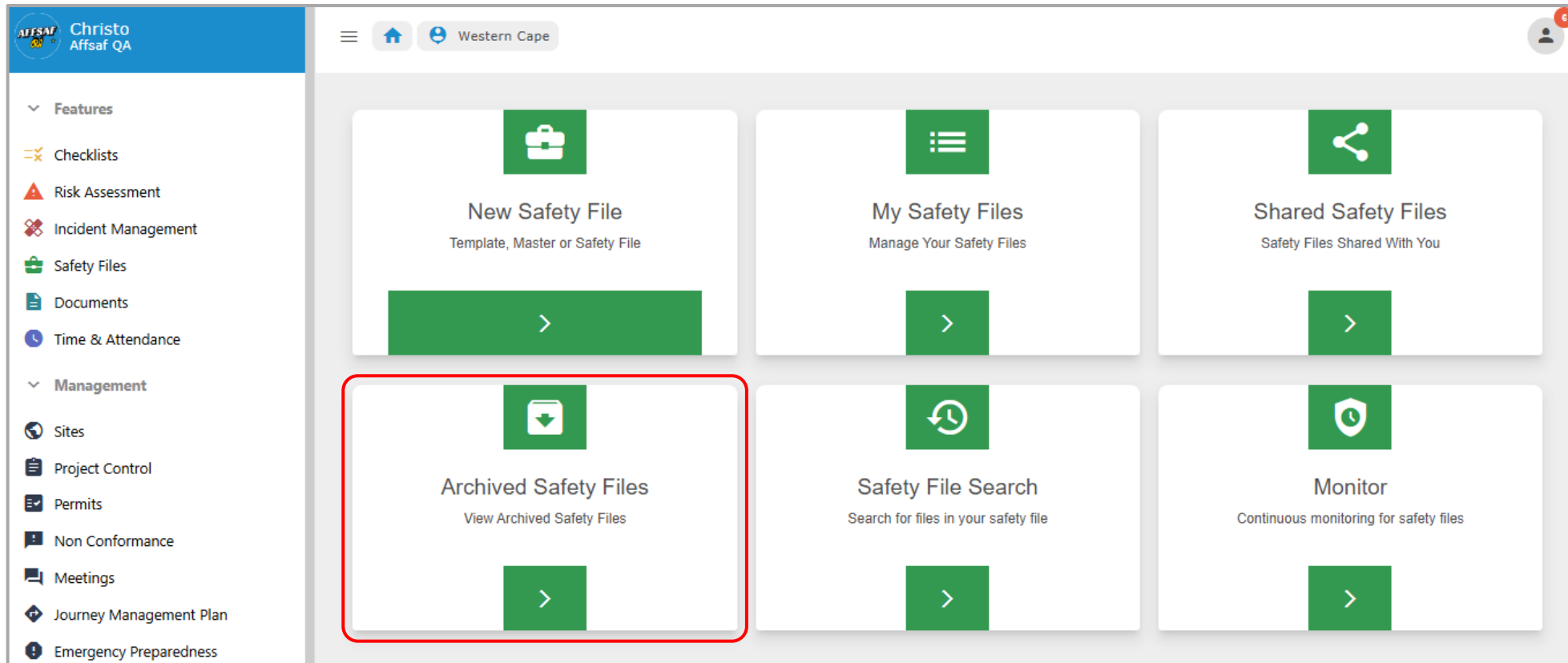


SAFETY 360 Elite

Archive

Stage 4 – FILES SHARED TO YOU

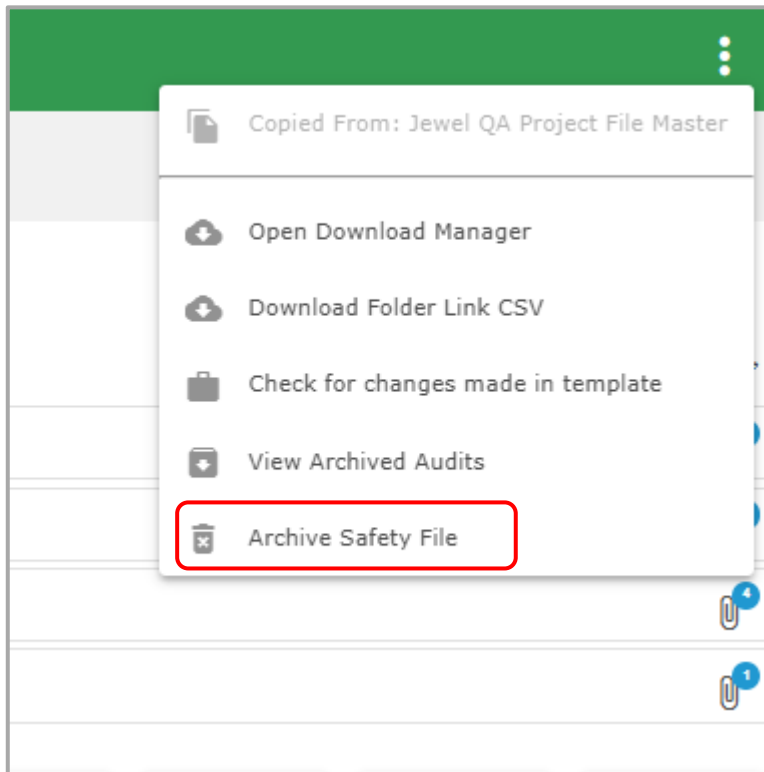
Files that have been shared INTERNALLY or EXTERNELAY are available under the SHARED SAFETY FILE tab on the main Safety File home screen.



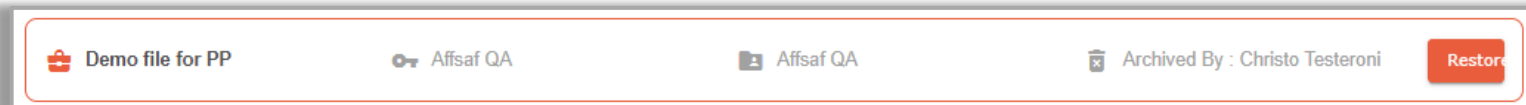
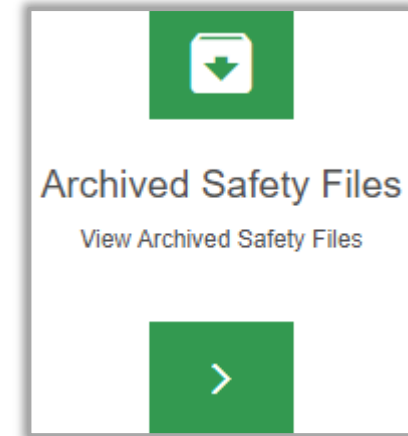
Select Share Safety files to open all files Shared with you

New Safety File – Archive Safety File

Files that have been created by mistake or are no longer going to be used can be Archived on the Main Safety File Dashboard, under the Main Folder bar (Green Bar), by clicking the 3 dots and selecting: Archive Safety File.



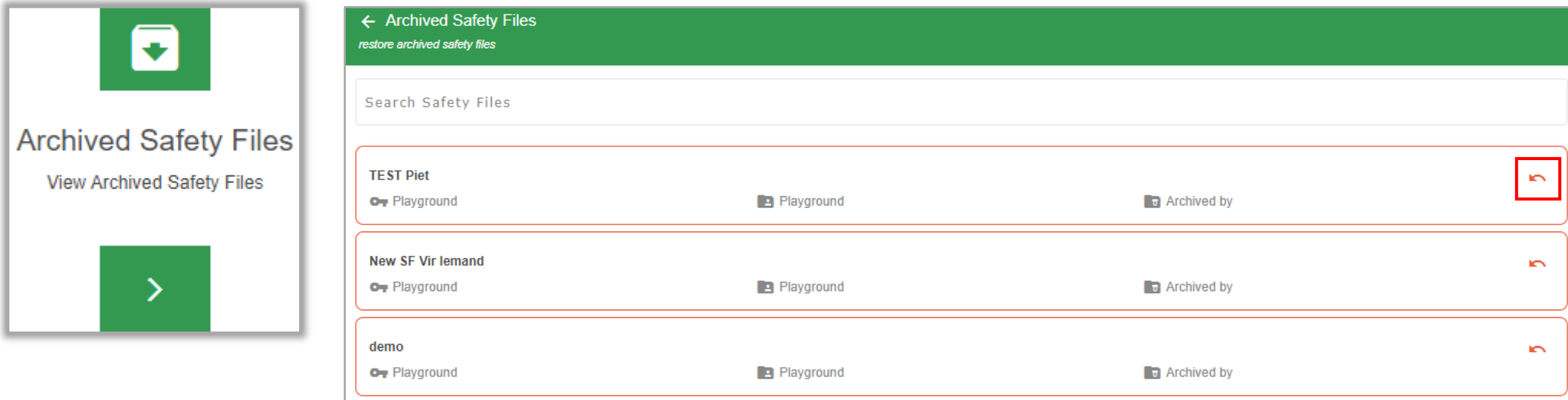
This will send the file to the Archived File Register where it can be re-instated by Control user



Archive means no longer visible in day to day folders but can be viewed and reinstated

New Safety File – Archive Safety File

Selecting the Archived Safety Files on the Main Safety File Dashboard, will open all the Archived Safety File.



← Archived Safety Files restore archived safety files			
Search Safety Files			
TEST Piet	Playground	Archived by	
New SF Vir lemand	Playground	Archived by	
demo	Playground	Archived by	

Archive means no longer visible in day to day folders but can be viewed and reinstated.
Controlle users can reinstate the file by selecting the line item and clicking on the red return arrow



SAFETY 360 Elite Monitor

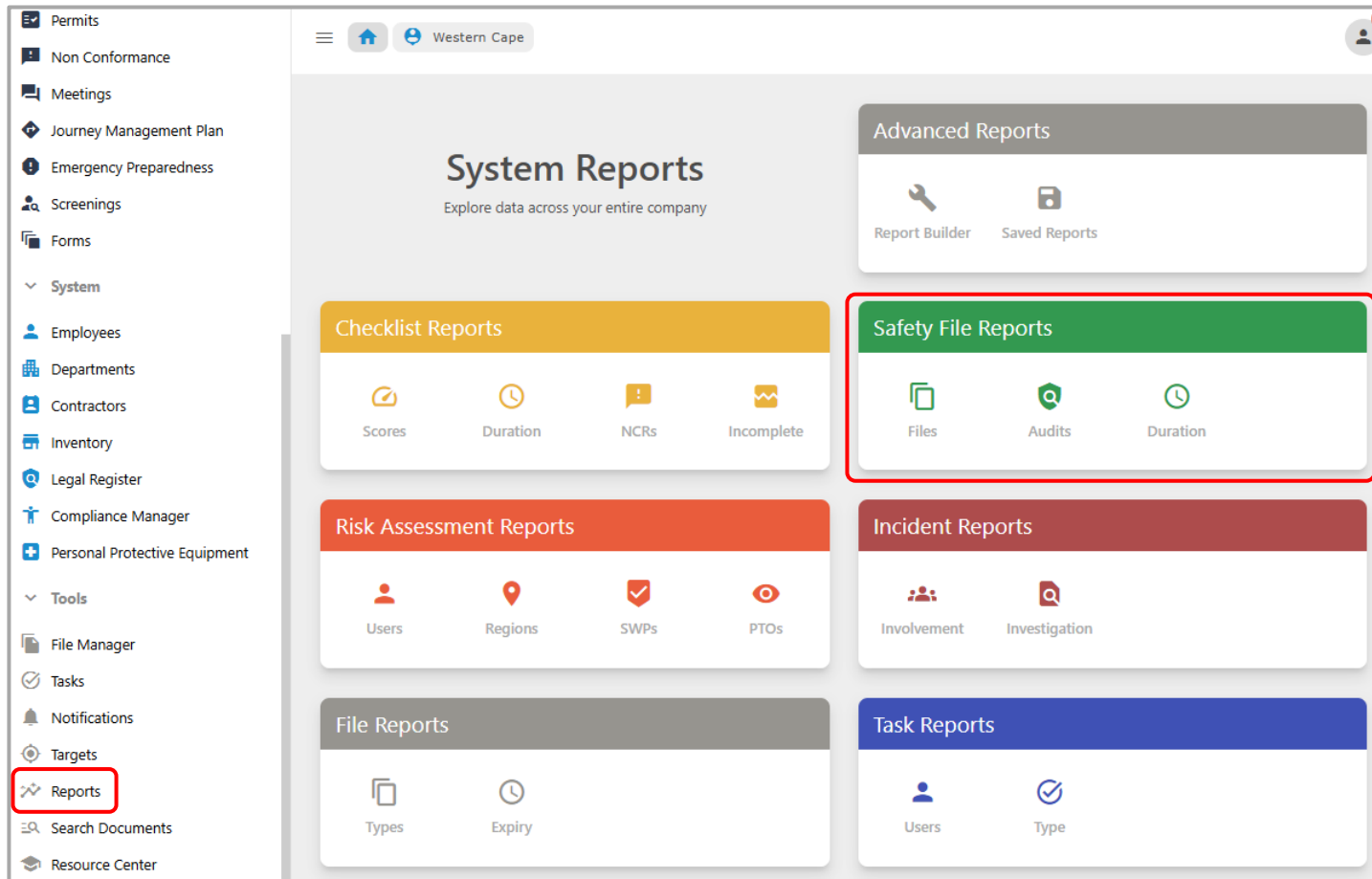


SAFETY 360 Elite

Reports

Safety File Reports

Under the Left Navigation Pane, there is a feature called Reports. Clicking the icon will open the Reports page if the user has the correct HSE role **Reports Controller**.



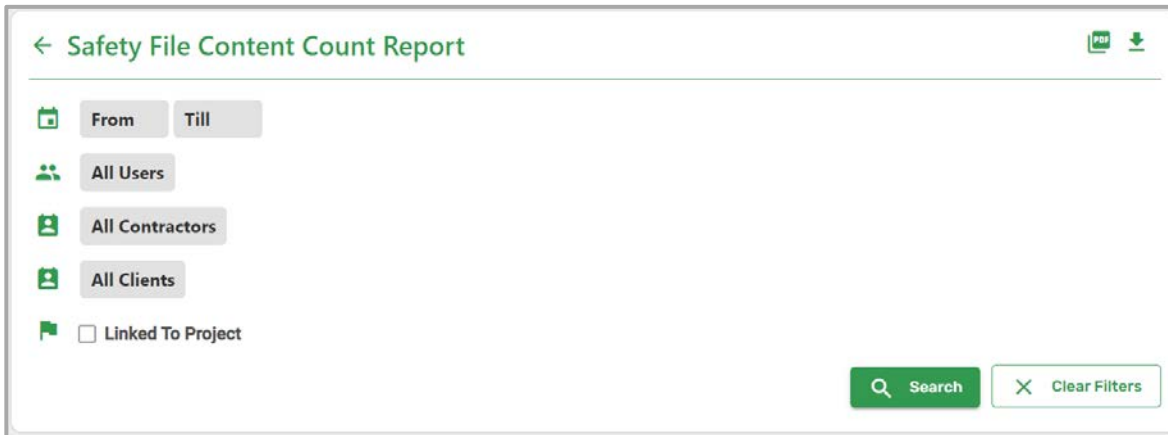
If this role is not assigned, the user will not be able to use reports. The report tabs are colour-coded for ease of use.

Safety File Reports

There are currently 3 types of Safety File Reports available on Safety 360 Elite:

1. Files  : Reports on Number of files per safety file
Files
2. Audits  : Reports on File Audit Scores per Safety File
Audits
3. Duration  : Reports on Time spent on Audits in days
Duration

These reports also include all the normal Reports filters that can be applied as needed:

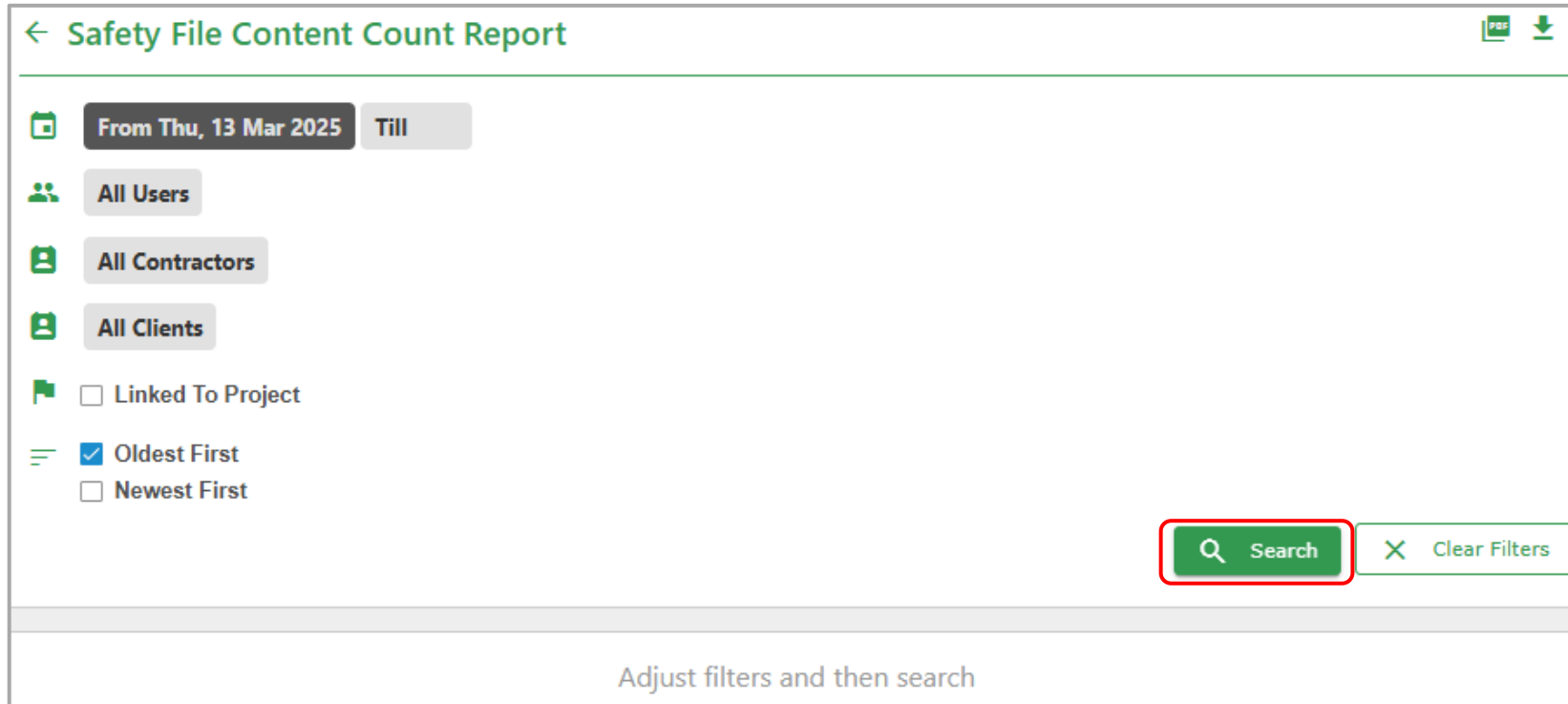


The screenshot shows the 'Safety File Content Count Report' filter interface. It includes a back arrow, a title, and a PDF download icon. The filter section contains: a date range selector with 'From' and 'Till' buttons; three user selection buttons: 'All Users', 'All Contractors', and 'All Clients'; and a checkbox labeled 'Linked To Project'. At the bottom, there are 'Search' and 'Clear Filters' buttons.

- Date range
- Users
- Contractors
- Clients
- Linked to Projects

Safety File Reports

By making use of the Safety 360 Elite Reports we can pull data for **Files**, **Audits** and **Durations**. Here users would apply the required filters (Date / users / regions / statuses / times).

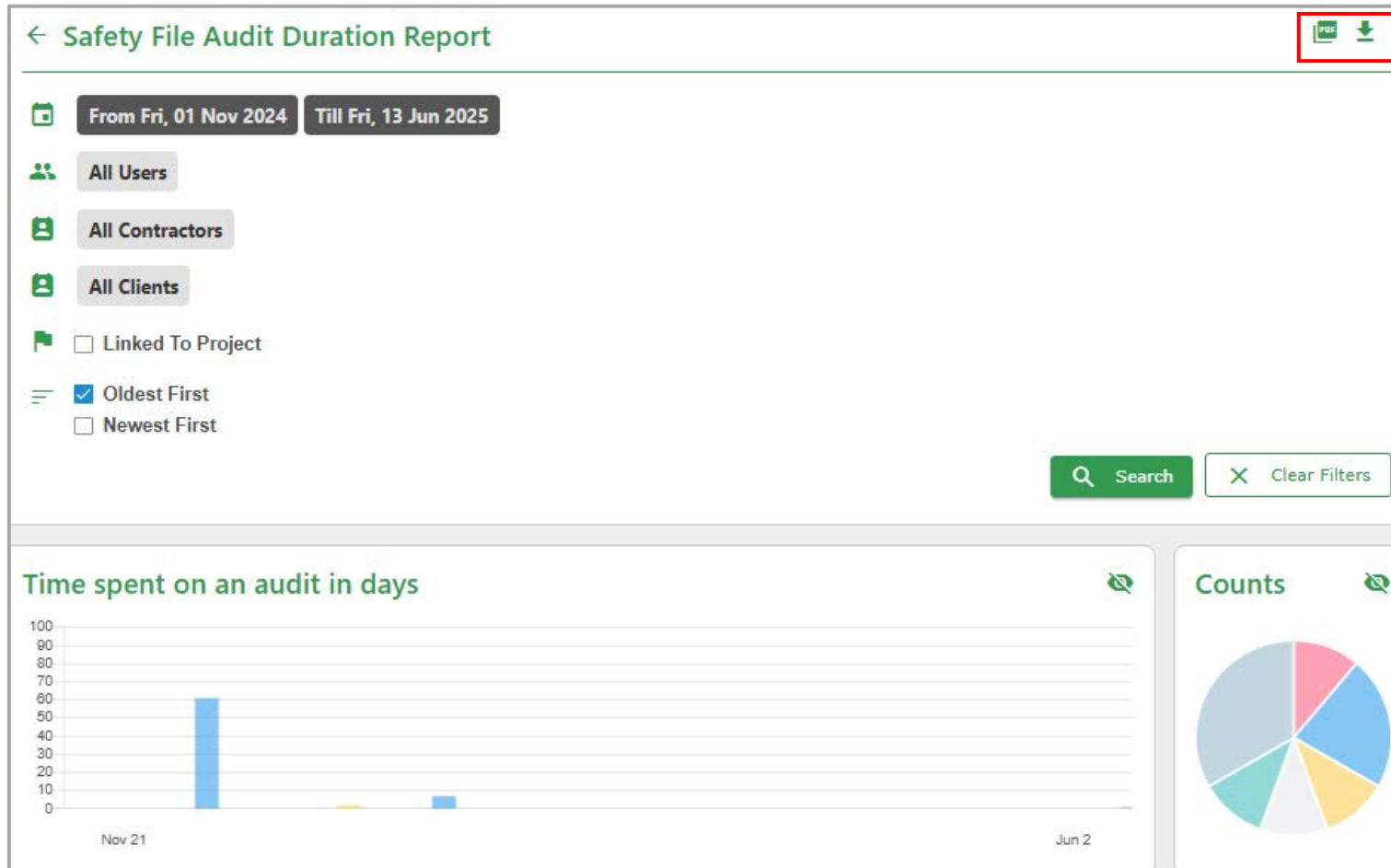


The screenshot shows the 'Safety File Content Count Report' interface. At the top, there is a title bar with a back arrow, the title 'Safety File Content Count Report', and icons for PDF export and download. Below the title bar, there are several filter sections: a date range filter with 'From Thu, 13 Mar 2025' and a 'Till' field; a user filter with 'All Users'; a contractor filter with 'All Contractors'; a client filter with 'All Clients'; a 'Linked To Project' checkbox; and a sort order section with 'Oldest First' selected and 'Newest First' as an option. At the bottom right, there is a 'Search' button with a magnifying glass icon, which is highlighted with a red rectangle, and a 'Clear Filters' button with an 'X' icon. At the very bottom, there is a footer text that says 'Adjust filters and then search'.

Once you have applied filters (if any), click the Search icon

Safety File Reports

Now the user will be show all the data that has passed through the filters.



All raw data can be extracted to csv for external use. The report displayed onscreen can also be exported to pdf by clicking the pdf icon.



RULES TO REMEMBER

PLEASE ENSURE, WHERE POSSIBLE, DOCUMENTS ARE LOADED TO SAFETY 360 ELITE FILE EXPLORER (IMS) AND IMPORTED FROM THE IMS TO AVOID DUPLICATES.

Using the **Upload Files** process should only be, for file-specific documents (drawings/Charts), meaning they won't be used anywhere else ever again....once and done.

By using the File Explorer we can ensure all documents can be managed in one place to avoid duplication and confusion. This will also remind control users of expiring files that require attention.

RULES TO REMEMBER

More Rules to Remember when dealing with **Files** (Master / Safety / Contractor)

1. Access to files must be given via sharing.
2. Assigning Safety file gives control to the assignee
3. Only Master files can be copied.
4. Master files cannot be shared externally.
5. The preferred choice for file population is **IMPORT FROM THE IMS**.
6. Ensure **Connected Companies** and **Shared Employees** are set-up to enable SHARING of Safety Files
7. Only the **assigned** parties can make changes or audit file (*if **assigned** role is not with you, you can only view*)
8. Only 1 **assigned** party at a time, check-in / check-out
9. NO DUPLICATES on import of files or folders in a file, even if they are in other folders.
10. The user will SHARE a safety file once, thereafter it needs to be assigned for the other person to action.

Conclusion

Safety Files aims to assist system users with creating, maintaining and sharing safety files digitally.

Contractor files can be used to onboard suppliers and ensure compliance through auditing.

All data can be downloaded for easy external use and can be reported on through Safety 360 Elite Reports.

Thank you.

Explore more at:
www.affsaf.co.za



Management
Systems



Safety
Plans



Assessments
and Audits



Induction
Videos



First Aid
Box



Digital
Development

