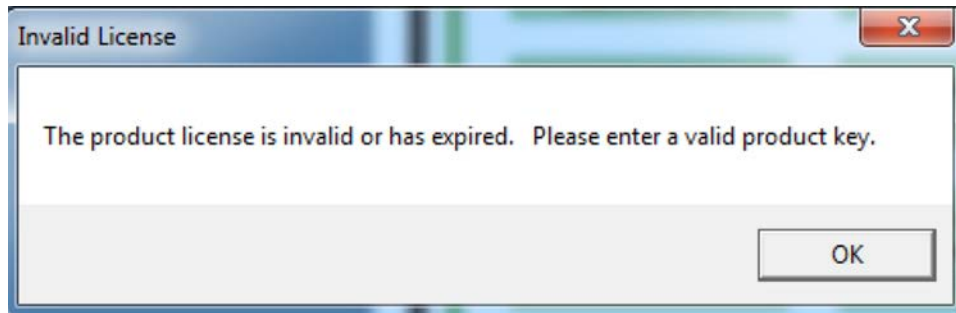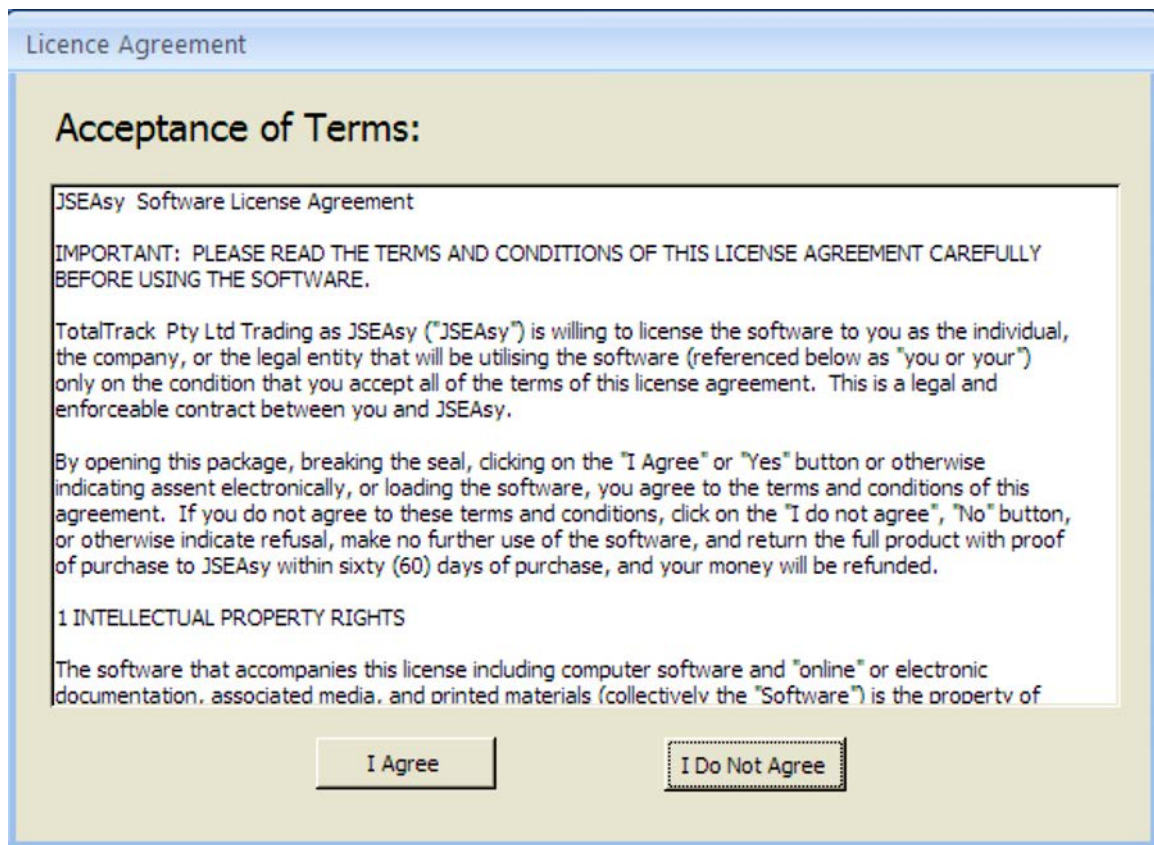# Steps for starting a new installation of JSEAsy

The first time you run JSEAsy after installation, if a license has not been previously entered then the following dialogue box will appear.


Click on "OK" and the License Agreement will appear as shown below

Click anywhere in the license text area and a scroll bar will appear on the right. You may then scroll down to read the entire License Agreement. JSEAsy will execute after clicking on the "I Agree" button.

If a valid License PAK has not been previously entered or the license has expired, the following dialogue box will appear:
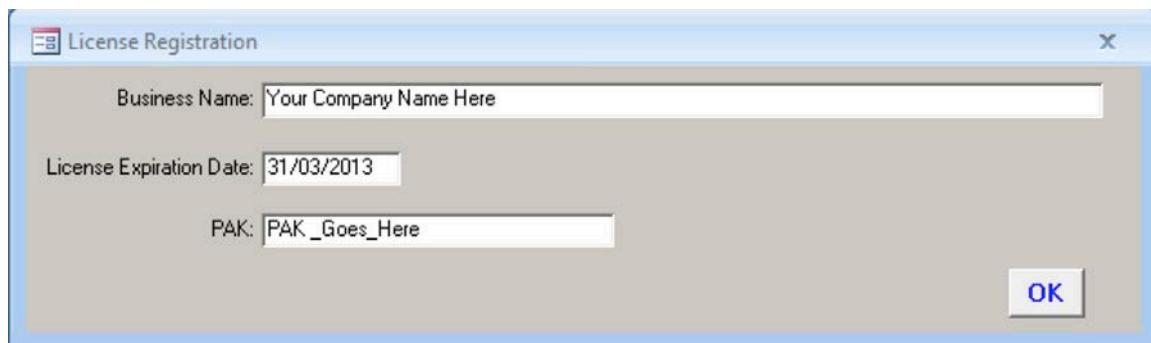
1.   Enter your company name in the space next to "Business Name". **Note: It is important to enter your company name exactly as you entered it on the JSEAsy Web Site to obtain your License PAK. This "Business Name" is also used by TotalTrack Pty. Ltd. to issue your License PAK and it will appear on reports produced by JSEAsy.**

2.   Enter a License Expiration Date. For a purchased license, enter 1/1/2222

3.   If you downloaded the JSEAsy installation, then enter the PAK number obtained from the JSEAsy Web Site, including dashes (hyphens). Otherwise, obtain a PAK number from the JSEAsy company and enter it in the space next to "PAK".

The following dialogue box might appear the first time you run JSEAsy after installation. This allows you to tell the JSEAsy program where your JSEAsy data file is located. This is necessary especially if you are using a network and your data file is on a server. This step will have to be performed on each computer on your network after JSEAsy is installed.
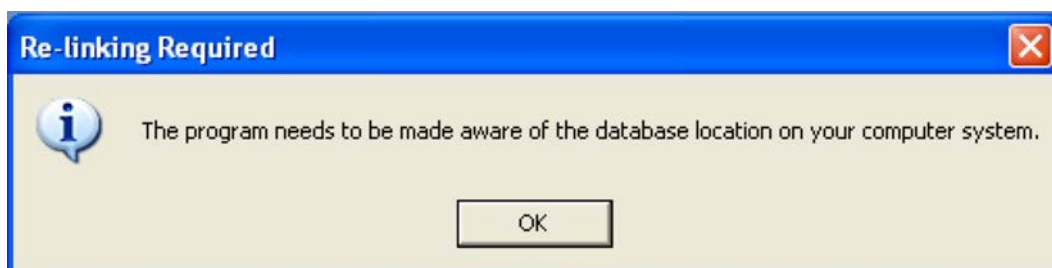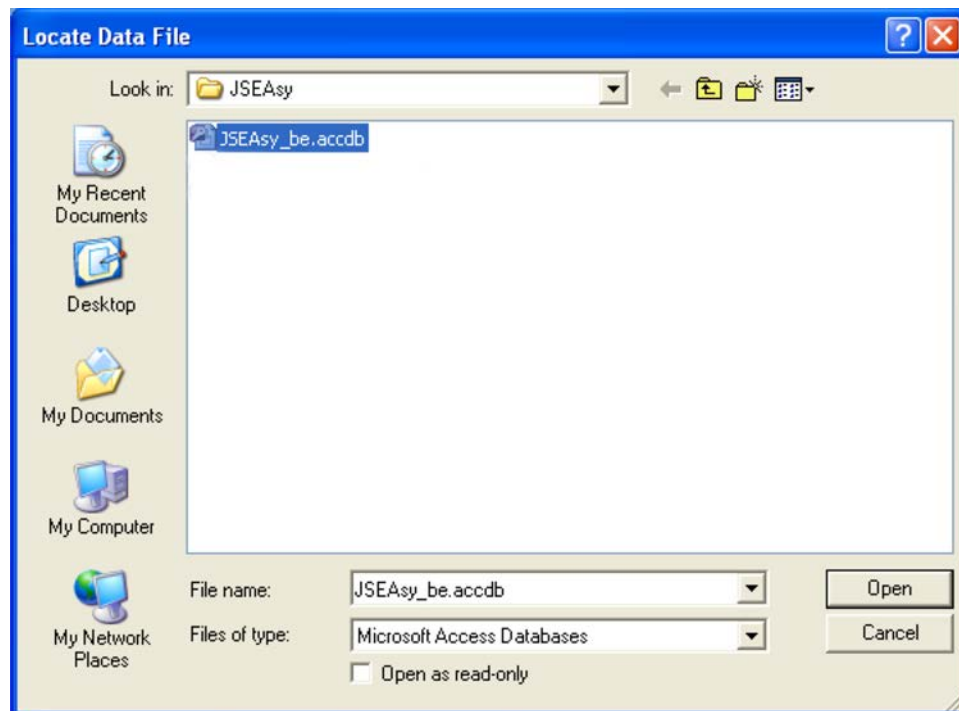

When this dialogue box appears, click on "OK", then the "Locate Data File" dialogue box will appear, as shown below.
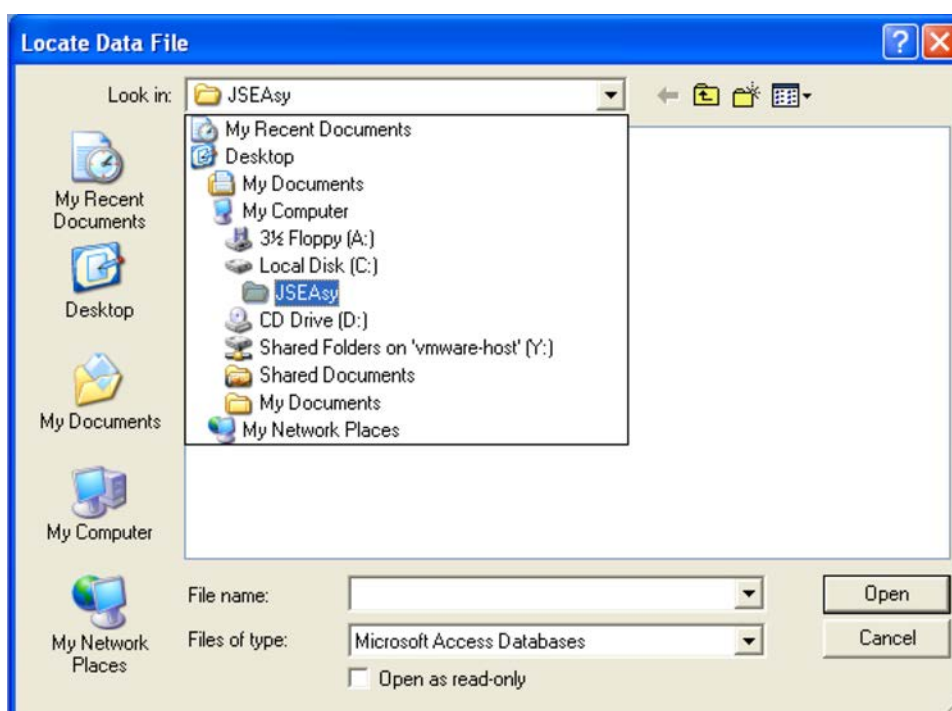
To locate the data file, click on the triangle to the right of the "Look in" field and first select the computer on your network that will be used as your file server. If you are not using a network, proceed to the next step.

Select your "C" drive, then click on "JSEAsy".

Then select "JSEAsy_be.accdb" from the list of files.

The main options form will appear when JSEAsy starts. Any of the main options may be selected by clicking (once) on the button with the label for the option.

When JSEAsy is running, check the upper right corner of the window to ensure that the display is using the full screen. If the full screen is not being utilised, the windows control box will appear as follows:

To use the full screen display, click on the square in the windows control box. JSEAsy is using the full screen display if the windows control box appears as follows:
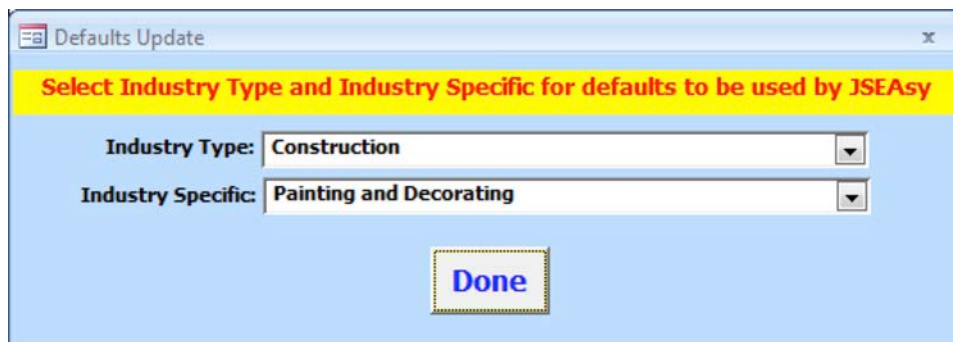
Note: If you do not have a high resolution screen, it is highly recommended that you use the "Auto Hide" option for the Windows Task Bar at the bottom of the screen to allow more screen area for display of forms and reports. To accomplish this right-click on the task bar then click on "Properties". Then under the "Taskbar" tab, make sure the "Auto hide" box is ticked. The Task Bar will appear when you move the cursor to the bottom of the screen (if your Task Bar is located at the bottom).

With JSEAsy up and running, it is important to do the following steps; otherwise you will not be able to create a Job in JSEAsy without these steps being done first.

1. **Update Defaults (Industry Type and Industry Specific)**
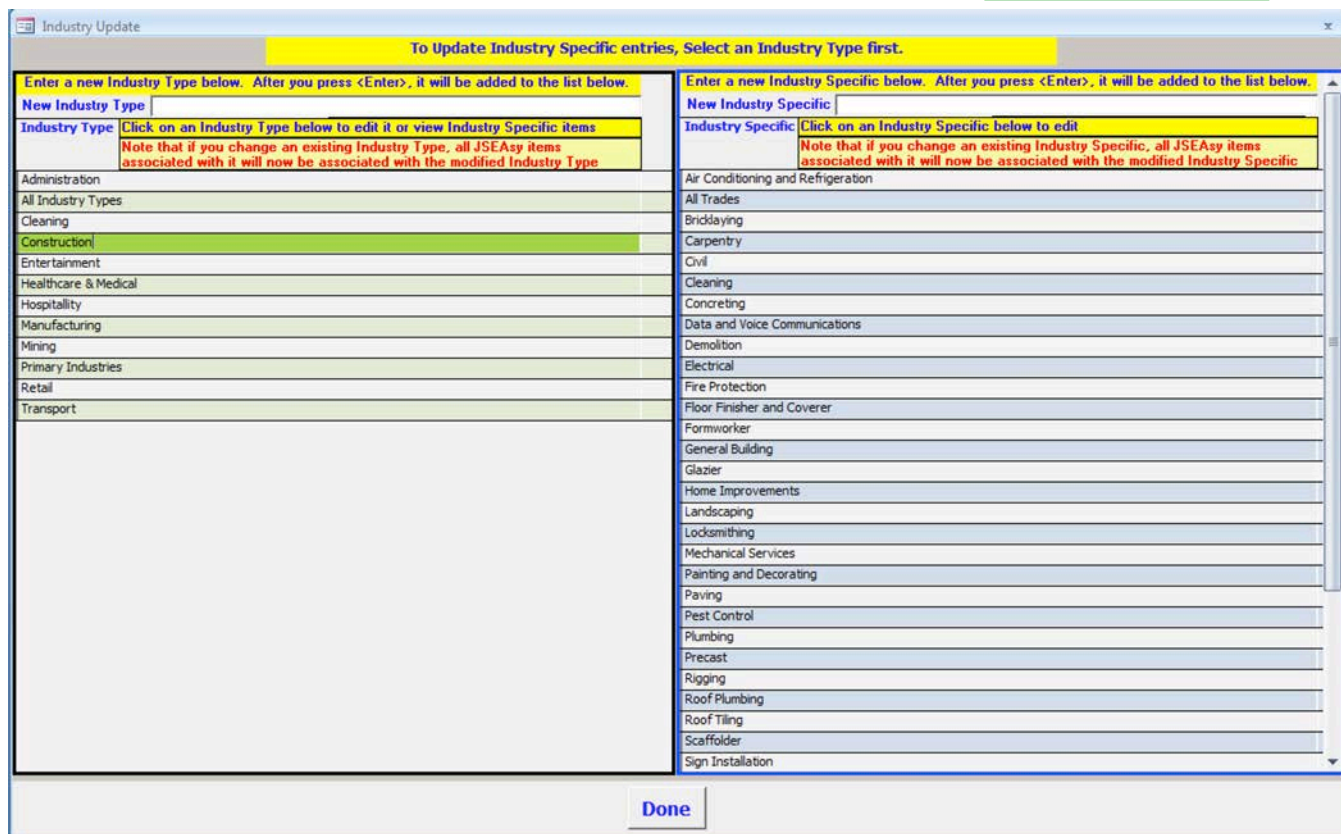   Click on this command button on the Main Options form to update the Industry Type and Industry Specific defaults (defaults are used throughout JSEAsy to automatically select items; however you may also change them at each instance. Select your Industry Type first then your Industry Specific (trade).

   > **Update Defaults (Industry Type and Industry Specific)**

   Defaults Update ____ x

   Select Industry Type and Industry Specific for defaults to be used by JSEAsy

   Industry Type: Construction ▼

   Industry Specific: Painting and Decorating ▼

   Done

   If your Industry Type or Industry Specific is not listed, then click on "Update Industry Type/Specific to add them.

   > **Update Industry Type/Specific**

   Industry Update ____ x

   To Update Industry Specific entries, Select an Industry Type first.

Enter a new Industry Type below. After you press <Enter>, it will be added to the list below.	Enter a new Industry Specific below. After you press <Enter>, it will be added to the list below.
New Industry Type	**New Industry Specific**
Industry Type Click on an Industry Type below to edit it or view Industry Specific items	**Industry Specific** Click on an Industry Specific below to edit
Note that if you change an existing Industry Type, all JSEAsy items associated with it will now be associated with the modified Industry Type	Note that if you change an existing Industry Specific, all JSEAsy items associated with it will now be associated with the modified Industry Specific
Administration	Air Conditioning and Refrigeration
All Industry Types	All Trades
Cleaning	Bricklaying
Construction	Carpentry
Entertainment	Civil
Healthcare & Medical	Cleaning
Hospitality	Concreting
Manufacturing	Data and Voice Communications
Mining	Demolition
Primary Industries	Electrical
Retail	Fire Protection
Transport	Floor Finisher and Coverer
	Formworker
	General Building
	Glazier
	Home Improvements
	Landscaping
	Locksmithing
	Mechanical Services
	Painting and Decorating
	Paving
	Pest Control
	Plumbing
	Precast
	Rigging
	Roof Plumbing
	Roof Tiling
	Scaffolder
	Sign Installation

   Done

   Click on the Industry Type in the left column and the associated Industry Specifics (trades) will be shown in the right column. If your industry Type is not in the list in the left column you may add it at the top of the column in the field "New Industry Type". If your Industry Specific (trade) is not listed in the right column you may add it at the top of the column in the field "New Industry Specific"

   Note that there is a special Industry Type "All Types". Any template created for "All Types" is made available to all Industry Types. Likewise there is an Industry Specific "All Trades" and any template created for "All Trades" is made available to all trades for that Industry Type.

2. Verify / Add Job Classifications.

Job classifications are used for Employees and are automatically used when selecting an employee for a JSEA sign-off as well as duties and responsibilities. Therefore you should verify that all your job classifications are listed and add them if they are not.

Click on the "Update Job Classifications" command button on the Main Options form.

<div style="border:1px solid green; display:inline-block; padding:4px; text-align:center;">**Update Job Classifications**</div>

The example shown on the next page for Industry Type = Construction and Industry Specific = Painting and Decorating does not have any Job Classifications listed. Therefore, you might want to add "Painter" as a classification or "Decorator" as a classification.

3. Add Employees and Subcontractors to JSEAsy, one at a time, along with personal details for each employee or subcontractor.

This is done by clicking on the "Add New Employee or Subcontractor" button on the Main Options form.

<div style="border:1px solid green; display:inline-block; padding:4px; text-align:center;">**Add New Employee or Subcontractor**</div>

This is important because Employee/Subcontractor data are used for selecting the name of the person who originated a JSEA, the supervisor to review the JSEA and the Safety Supervisor.

Be sure to select the Job Classification for the employee/Subcontractor as this is used for automatic selection in JSEA sign-offs.

4. Add Customers to JSEAsy, one at a time.
This is done by clicking on the "Add New Customer" button on the Main Options form. Use this to add existing customers that you may do more business with in the future. Later you may add new customers as they are established.

Add New Customer

When a new job is created, you can select a customer from the list of customers in JSEAsy. If the new job is for a customer that is not already in JSEAsy, then the new customer may be added along with the new job.

5. Passwords
Access and modification of sensitive data are protected by passwords. The protected data are grouped into three types, management data, personnel data and admin data, which require different passwords. Give the individual passwords only to trusted employees that you will give the authority to perform the specific functions.

When you first install JSEAsy, all passwords are set to "TotalTrack" by default. It is important that you change the default passwords as soon as possible after installation by clicking on the "Update Passwords or License PAK" button on the Main Options form.
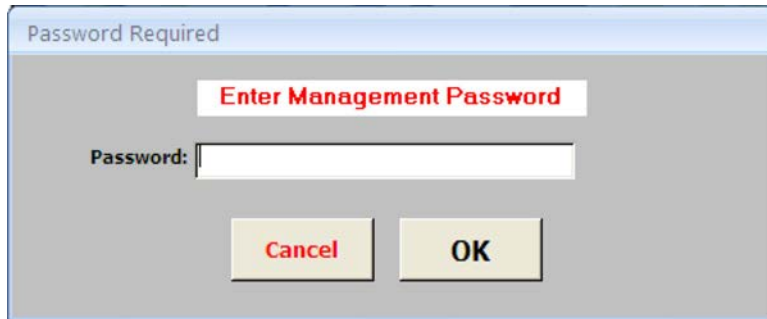
Update Passwords
or License PAK

Update Passwords

Password Type: [▼]
Current Password: [   ]

New Password: [   ]
Verify New Password: [   ]

| Update License PAK | Update Password | Exit |

Click on the triangle to the right of "Password Type" then select a password type.
Enter the current password "totaltrack" (not case sensitive), then enter new password and enter it again in "Verify New Password". Repeat this process for all three password types
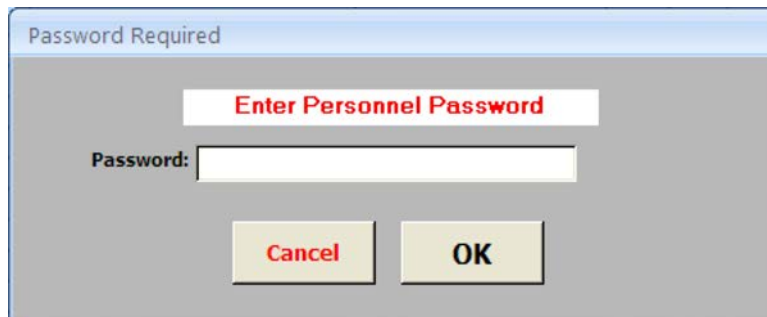
Update Passwords

Password Type: [▼]
Current Password: Admin Password
Management Password
Personnel Password

New Password: [   ]
Verify New Password: [   ]

| Update License PAK | Update Password | Exit |

Samples are shown below for the three different password types when a password is required. Simply enter the password and click on "OK".
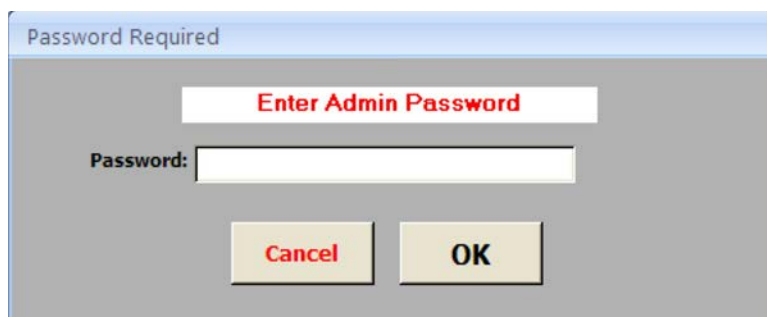
Management data includes JSEA Templates. Thus you should only divulge the Management password to staff members that are allowed to modify Management data, like JSEA Templates. **Note that the Management Password is also considered the "Master" password and it may be entered for any of the other passwords. It may also be entered as the current password for any of the other passwords when updating passwords.**

Personnel data (employees and subcontractors) may be viewed or a new employee/subcontractor entered without the use of a password. However the Personnel Password must be used to modify or enter data for an existing employee/subcontractor. This password is also required to update Licenses, Insurance and Qualifications lists for Employees.

The Admin password is required to update the list of Potential Hazards and Hazard Control Measures, update of JSEA Qualifications, Duties, PPE, etc.

Reset Passwords

If you forget one or more of your passwords, contact us at JSEAsy (TotalTrack Pty. Ltd.) and we can give you the sequence of steps that will reset all your passwords.

Backups

Doing daily backups (backup copy) of your JSEAsy data is extremely important. The value of daily backups cannot be stressed enough. You may do backups for months or even years and never need them, but one small glitch can corrupt (damage) your JSEAsy data and render it unusable. A computer crash or hang, power fluctuation, network error, etc. are a few causes of JSEAsy data corruption. Once JSEAsy is corrupted you may not be able to access your data or enter new data. The JSEAsy program file (JSEAsy.accdr) may be restored from the JSEAsy installation Package, but your data file must be restored from your backups. Thus it is extremely important to backup file JSEAsy_be.accdb which is in folder "C:\JSEAsy".

It is recommended that you do NOT perform the daily backups to the same media, i.e. the same disk, CD, tape, etc. You should have a different media for each day, i.e. if you are using zip disks for your backups, you should have one zip disk for Monday, one for Tuesday…etc. This is to prevent overwriting a good backup with a corrupted backup. For example, perhaps one aspect of you data was corrupted by a power fluctuation on Tuesday, but you didn't realize that the corruption had occurred until Thursday. If you had used the same media for daily backups, then when you attempted to restore the data file from backups on Thursday, you would get the backup file from Wednesday, which is corrupted. With separate media for each night, you could then restore the data file from each of the preceding nights until you obtained a non-corrupted copy.

It is also recommended that you archive you data periodically, perhaps once a week, then once a month. An archive is simply a backup that you keep for a longer period of time.

You can minimise the chances of data corruption by using an uninterruptible power supply (UPS). A "Smart" UPS is recommended since it will maintain proper voltage and therefore reduce the chances of data corruption from power fluctuations.

After these steps are completed, JSEAsy is ready for operational use. Refer to JSEAsy Operational Procedures for steps to produce JSEAs. Current procedures are located in C:\JSEAsy