The OPTIC System™

Advanced *Health, Safety and Environment (HSE)* Web & mobile platform with *LMS (Online Training)* add-on, connected to *EAGLE GPS™* platform – rich in features, reliable, responsive and robust, used 24/7 by thousands of concurrent users as daily HSE management tool – designed to help people work safely through effective record keeping, information delivery, communication and action management. Smart operations and notifications are processed in the background using a rule-based AI engine, running on default or custom business rules.

Features / Highlights

The OPTIC System™ (OPTIC) is a workplace health, safety and environment (HSE) management Web-based software for construction and trade services, asset intensive manufacturing and industrial processing companies, utilities and municipal services - allowing customers to use the best safety practices in HSE based business process management.

Initiated between years 2005 and 2006, the software modules have been designed with a certain consistency in mind, therefore preserving a similar look and feel, generally operating on one or multiple records at once. Modules are divided into **four main areas of activity**:

- **People**: Awards & Incentives, Contractor Management, Employee Management, Hours Management, KPI Management, Meeting Management;
- **Hazard Management**: Inspection Management, Job Hazard Assessment, SDS Management, Tools & Equipment Management;
- **Loss Management**: Incident Management, Wellness Management;
- **Resources**: Documents, Forms, HSE Manual, Legislation, Media, Memos, Quality Control, Toolbox Topics;

In addition: **Dashboard** and **Online Training (OPTIC LMS,** add-on**)** modules. Also, many **reports** – executed manually or automatically, through a *Report Scheduler*.

Module highlights:

- **Action Centre**
  Manages corrective or preventative actions created either manually (assigned to one or more people, regular or "joint"/one-completes-for-all) or automatically by the system. Management of actions assigned from other modules (most modules allow assigning actions, e.g. incident or inspection actions). Ability to define multiple references to other OPTIC records (e.g. to an employee, an incident and two documents). Attachments section.
- **Awards and Incentives**
  Intended to motivate or reward employees, in a point-based system. Points or items (e.g. hats, t-shirts, etc.) can be awarded manually or automatically.
- **Contractor Management**
  Management of contractors (companies) and their employees (contractor employees) –

Basic Information, Attachments, Clearance Letter, Certificate of Insurance (Commercial and Automobile), Certificate of Recognition, GST information, NDA document, QA / QC documentation, Questionnaire, yearly TRIF (last 3 years), WCB by province / state (multiple years), multiple Contacts. All employees (contractor employees) managed through *Employee Management*.

- **Employee Management**
  Management of employee records – Basic Information, Additional Information, Attachments, Attendance, Behavior, Confidential Information, Driver File (containing *14 subsections*: Abstract Consent Form, Driver Abstract, Driving Infractions, etc.), Job History (change tracking), Medical (including Fitness to Work records / Medical Questionnaires – with stats in main OPTIC page), Performance (complex subsection, with multiple evaluations and automatic average calculation), Preferences, Security Information (enabling online access / user name, assigning security groups, resetting password), LINKS (list of records involving current employee record), ADMIN (merging employee records, with automatic search and re-linking to other records, e.g. replacing employee involved in an incident). Subsections: Training (full integration with Online Training / OPTIC LMS), Apprenticeship, Trades, Projects, Transfer.

- **Hours Management**
  Collection (manual entry) of hours worked in a custom-defined time period (day, week, month, year) for custom-defined granularity (contractor, employee, project, department, location, organization), with automatic roll-up (summary at top). Attachments section.

- **Incident Management**
  Advanced management of incident reporting, with Basic Information about the incident (occurrence and reported dates, on-site supervisor, contact person, description, immediate action taken, nature of incident, people/equipment involved and many other fields), Attachments, Costs, Investigation Team, Incident Rating (Loss Rating / Risk Rating / Likelihood of Reoccurrence / Activity Frequency), Causal Analysis (SCAT technique), Circulate (notification of key personnel about the incident). Multiple sections for managing the details related to the nature of incident, e.g. First Aid (by person involved) in case of an injury. Allows defining injured body parts. Automatic generation of wellness records (configurable).

- **Inspection Management**
  Management of inspection records performed using the default layout or custom layout (using templates), first OPTIC module that implemented custom layouts, also used when building the very first version of the mobile application (*OPTIC Mobile*, previously known as *OPTIC Offline*). Can be linked to a *Tool / Equipment* record. Attachments section.

- **Job Hazard Assessment**
  Management of job hazard assessments through Basic Information, Attachments and Assessment Team. Approval task with notifications to key personnel. Management of multiple Steps / Hazard / Controls.

- **KPI Management**
  Allows defining custom metrics and applying those to a particular time resolution (day, week, month, quarter, year) and time range to produce outputs, combined with user data (manual data entry) – if needed. The default layout produces a tabular layout but the layout can also be changed to meet customer needs (custom layouts). Roll-up KPI records can be created, combining the results of multiple regular KPI. Defining the metrics require working with Technical Support – in order to define and implement the low-level aspects of the logic required. Attachments section.

- **Meeting Management**
  Allows defining the context of a meeting (date/time, type, location, general notes), building agenda and meeting records (text and attachments) as well as assigning the meeting chair and keeping track of invitees / attendees. References to other records can be provided, e.g. documents, incident records, etc. People can be notified about the Agenda / Minutes. Attachments section.

- **Online Training (OPTIC LMS) / add-on:**
  Allows custom-designing of online training material (direct upload of files in any format or pointing to external resources – documents, video, etc.) and quiz questions, as well as the ability for LMS candidates to upload personal information (apprenticeships, driving licence and related information, trades, previous training, additional / medical information) followed by approval from LMS administrators. Online tests are tracked automatically, providing activity overview as well as history of answers provided (with timestamp) and training certificates with embedded QR codes. Multiple email notifications for training assigned, test passed/failed, approval needed as well as approved/rejected, etc.
  Overview: http://www.theopticsystem.com/doc/OnlineTrainingInOPTIC.pdf

- **SDS Management**
  Management of SDS documents and related documentation, with ability to generate binders (PDF files) from multiple SDS records. Ability to share an SDS with other OPTIC customers (integration of such selected SDS records in own OPTIC system).

- **Tools & Equipment Management**
  Management of tools and equipment records through Basic Information, Attachments, Depreciation calculation (*Straight Line* and *Double Declining Balance* depreciation methods), History (change tracking), Insurance, Lease / Rental, Purchase Information,

LINKS (list of records involving current T/E record). Can be assigned to an employee or to another tool/equipment record. Tracking of Maintenance / Repairs records, with most recent Certifications in Basic Information – for quick preview. Transfer task.

- **Wellness Management**
  Management of manually created wellness records or of automatic records created from First Aid sections of an incident record – through Basic Information, Additional Information, Attachments, Activities, Claim Information (WCB), Costs, Injury / Illness (extension of First Aid section of an incident, if applicable), Lost Time / Modified Duties.

- **RESOURCES**
  Management of *Documents, Forms, HSE Manual, Legislation, Media, Memos, Quality Control, Toolbox Topics* – in dedicated sections and with the ability to assign actions related to individual documents/files. Any file type can be uploaded or references to third-party (Web) documents can be provided. Folder-level security access by security group (on top of standard security).

In addition:

- **Dashboard**
  Provides overall information / visuals through line/bar/pie charts – preconfigured for each security group (further configuration allowed when using / viewing those Dashboard items), on multiple "screens" – which can be swiped left/right. Allows a high level of customization. Similar to *KPI Management* module, requires working with Technical Support to define the Dashboard items, but several default items are already provided.

- **Reports**
  The customized, ad-hoc or scheduled reports provide key information to assist in analysis of company safety overall, delivered in PDF or CSV (data only) formats. Currently, there are 70 reports in the system. Configuration parameters ("report configurations") can be saved for later use, acting as shortcuts and therefore users being able to run them immediately.

- **Online Help**
  Provides insight over all main areas of OPTIC, with screenshots and can be accessed from any main module. Can be printed as whole or only the section currently viewed.

- **Settings**
  Allows changing (updating) of a large number of settings or adding/deleting settings – where allowed. Settings are grouped by module. Some settings cannot be deleted (system settings).

- **Security**
  The entire system is driven by permissions assigned to *Security Groups*, which in turn define what a user assigned to a security group can do or not in the system. All configuration is defined at high level inheriting towards lower levels, in a tree-like structure. When a particular security setting is not defined, the parent setting is used – for example, certain users can be blocked from viewing SIN (SSN) numbers and date of births of employee records (*Employee Management*). Security can also be overwritten or extended by *business rules* – for example: "*given that all users of a security group are denied access to all incident records, allow full access to those users of a certain department*".

- **Rule-Based Engine**
  Fully integrated with OPTIC, a *rule-based engine* runs on a set of business rules defined by module. The rules are of three types: (1) regular/operational, executing along e.g. during a record SAVE, to notify people about a new or updated record; (2) regular/periodic, executing from time to time, as configured, to check conditions and fire (execute); (3) maintenance/cleanup business rules, e.g. to remove temporary or old/unused data.
  Currently, OPTIC has over **150 default business rules**. Customers can configure those through Settings but the core logic can be changed only by Technical Support. Some customers have their own business rules, developed for them only – to meet their needs. The business rules can be configured to do essentially *anything / anytime* for a customer (not only notifications) and they are *100% integrated with the system*.

- **Advanced Search**
  All main modules have an *Advanced Search* section, allowing to find quickly any set of records in the system – based on a set of filters, e.g. "*Find all employees in (a particular department) with email address containing (keyword)*".

- **Attachments**
  All main modules have an *Attachments* section allowing uploading files to server, providing a third-party Web link (e.g. link to a PDF or video file) or uploading an image captured live from computer's/device's camera (subject to user permission to access camera).

- **Emails from OPTIC**
  Users have the ability to send emails directly from OPTIC – with attachments from their computer/device or implicit attachment (PDF) after running a report.

- **Templates (Custom Layouts)**
  Essentially all main modules have the ability to use templates (custom layouts), which are also mobile-friendly and are defined once for the Web application then can be used

with the mobile application as well. We encourage our customers to convert their paper forms (e.g. inspection forms) into electronic format themselves, with minimal assistance from us (Technical Support). Once built, they can be used to create/update an unlimited number of records (e.g. inspection or job hazard assessment forms, but not limited to those) - on both Web and mobile apps.

- **Multi-Language**
  Potential for multi-language exists but it has not been implemented yet, English (default) version being accepted by our customers.

- **Data Bridges**
  OPTIC has the ability to automate data movement from other applications or database environments (e.g.HR apps) into its own database, usually as data in CSV (comma-separated values) format. We have multiple customers using such bridges, usually running during the night. The cost of developing such bridges depends on complexity and needs to be evaluated – case by case. OPTIC has also the ability to automate importing of training from other LMS / online training platforms (*BIS Trainer, OSG Online* / former *Online Learning Enterprises* and *Yardstick / Rapid LMS*) through API calls.

- **Geolocation**
  Subject to user permission, OPTIC has the ability to capture the geolocation (latitude, longitude) of current user and store it in database upon SAVE. It can also be viewed on a standard Google Maps by clicking on the corresponding icon shown in the area of *Last Updated Date / By* of a main module record. Geolocation is also captured automatically by the mobile app (*OPTIC Mobile*).

- **Integration with Eagle GPS**
  OPTIC is fully integrated with www.eaglegps.ca platform, developed and owned by *Friendly Eagle Software Inc.* so that if an employee is tracked by a GPS tracking device, live province / state and geolocation are displayed under *Employee Management*, updated every *~ 30 seconds*. Similar integration exists for *Tools / Equipment*.

- **Performance**
  Considerable development effort has been invested to make the system intuitive, responsive, robust and reliable. We realize that everyone's time is precious and we've narrowed down deficiencies and either fixed issues or replaced functional areas in order to achieve that.

- **Continuous Upgrades and Custom Development**
  OPTIC is a dynamic product, continuously evolving based on customer feedback. New features – targeted to a meet a particular customer's needs – are added from time to time. Those changes must not impact normal operation of other customers and they need to be consistent with the application, overall. Such developments are done based

on an approved statement of work, meeting or even under established timeline, checking periodically with the customer.

- **Technical Support**
  Basic technical support is included automatically through the **DEFAULT SOFTWARE**. We have the reputation of a very responsive and outstanding technical support, resolving any potential issues as quickly as possible - keeping our customers informed along the way. We are also listening to customer feedback, incorporating as much as possible according to our development agenda or as custom (financially assisted) development.

- **Mobile Application**
  "OPTIC Mobile" app complements the Web application and there is no additional cost to use it - with the regular *Client ID (derived from company name), User Name and Password* used in the Web application. For example, if accessing OPTIC as https://secure.theopticsystem.com/**Demo**, the *Client ID* is "**Demo**". It operates on a subset of records downloaded from server to a mobile device, being a simplified version of the Web application. Custom (electronic) forms are supported as well. Documents (*PDF, Word, audio/MP3, video/MP4, pictures, etc.*) can be downloaded on the mobile device for later viewing with default application of the mobile device - when disconnected from the Internet (**offline**). In a similar way, the records and custom (electronic) forms can be operated on while **offline, with automatic or manual uploading** to OPTIC server when Internet becomes available. The performance of the mobile app is affected by the performance of mobile device, being also impacted by the volume of data downloaded, adjustable through its *Settings*.

Data Security and Access Management

All records are stored in a secure Web server that is accessible to designated users across the corporation through an Internet connection. As a software as a service product, there is only one current version in existence. When the software is updated, all subscribers benefit from upgrades as soon as they are deployed.

The following controls have been implemented:

SSL Encryption (https)

Similar to the security protocol used with online banking, The OPTIC System uses SSL encryption, currently through *sha256RSA* signature algorithm. This process allows accessing the Internet from any computer and protects the transfer or retrieval of information.

Tier 3 Data Center Management

We use a specialized third-party agency, Whipcord / whipcord.com (Canada) – to provide our data center management services. These facilities follow standards for concurrent maintainability for space, power, mechanical systems and security. These processes prevent unauthorized access to our servers as well as fire, theft and power failure protection.

Daily Backups

We back up the data on our servers daily (files/attachments and database) to sync.com – a Canadian-based cloud storage platform. This ensures that virtually all information is maintained and kept up to date within the last 24 hours. Even in the extremely unlikely event that our servers became completely inoperable, we would be able to restore from the backup data and have everyone back online with no more than 24 hours of data loss. Besides those full daily backups of database, differential backups are executed *hourly*.

Fingerprinting

We maintain a set of automatic database fingerprinting records that track the changes made in the system (*old value* – *new value* pairs, with timestamp). Not only does this enable us to confirm which user made changes to records in the system and when (including deletion), it enables us to provide administrators and managers details about users making changes in the system and, if necessary, to reverse those changes.

Setup and Data Importing

During initial setup, we could import/transfer customer data from other systems at no additional cost, including files (documents / attachments) or from basic Excel or CSV files (e.g. *First Name, Last Name, Department, Job Title, Email, Address, etc*) - assuming that the data is easily accessible and straight-forward to process. With an empty, default database, we could launch your OPTIC software management application even **within one hour or less!**

Each customer has its own secure database and file storage and the customer owns the data, in full privacy and confidentiality. Please refer to Terms and Conditions for details.

The system has to work for you and your business - as a useful HSE tool, providing promptly the information you need, when you need it.

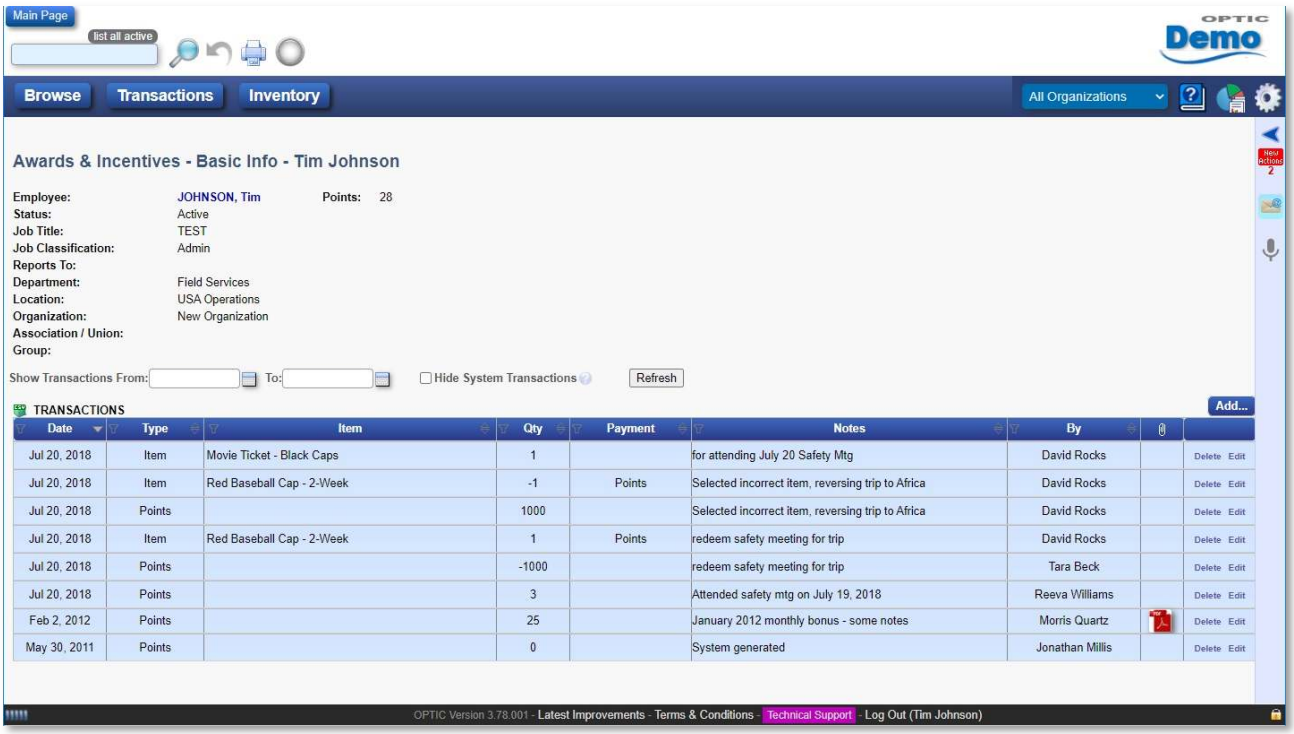
Basic Technical Support is included and there is no long-term contract - only *30 days* advance notice to stop using the system, without any cancellation penalty.

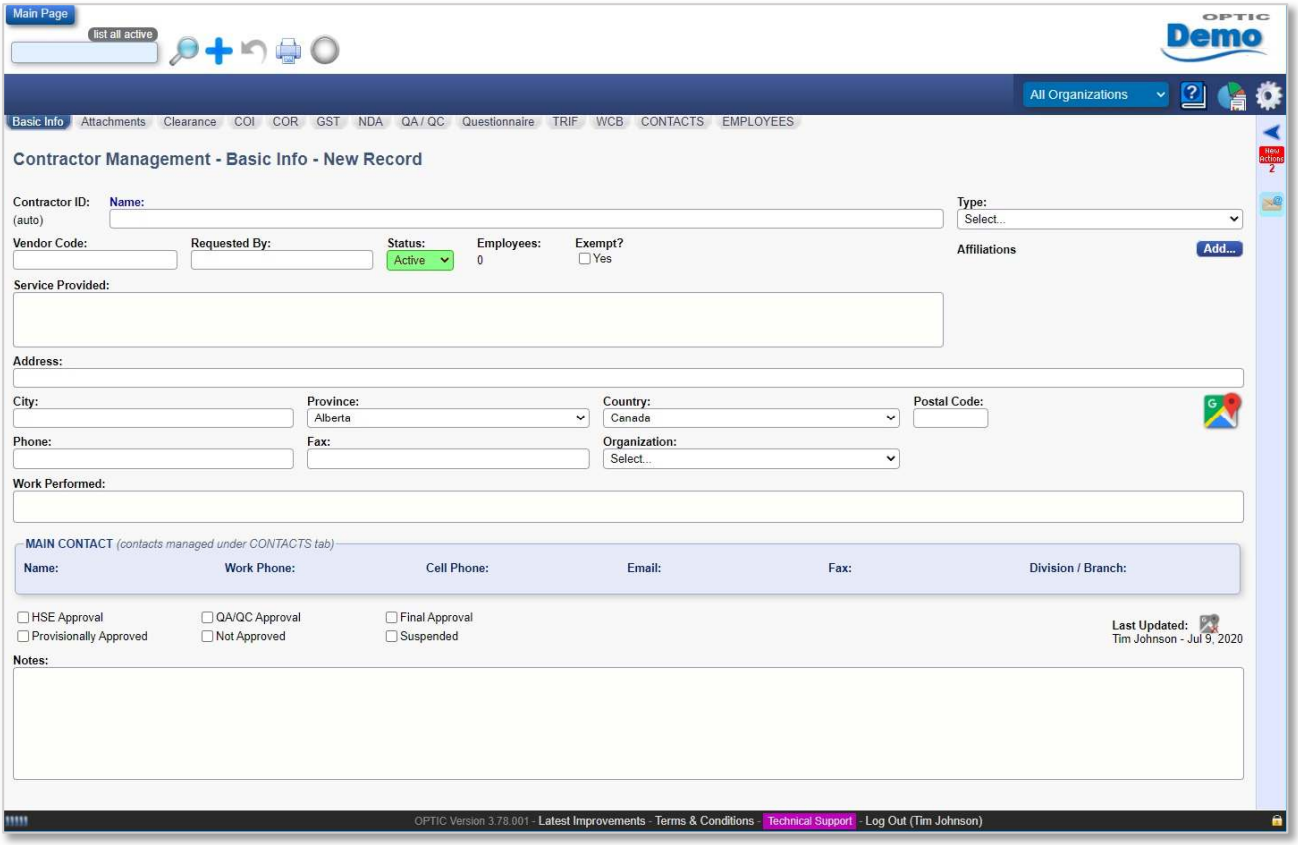
Screenshots

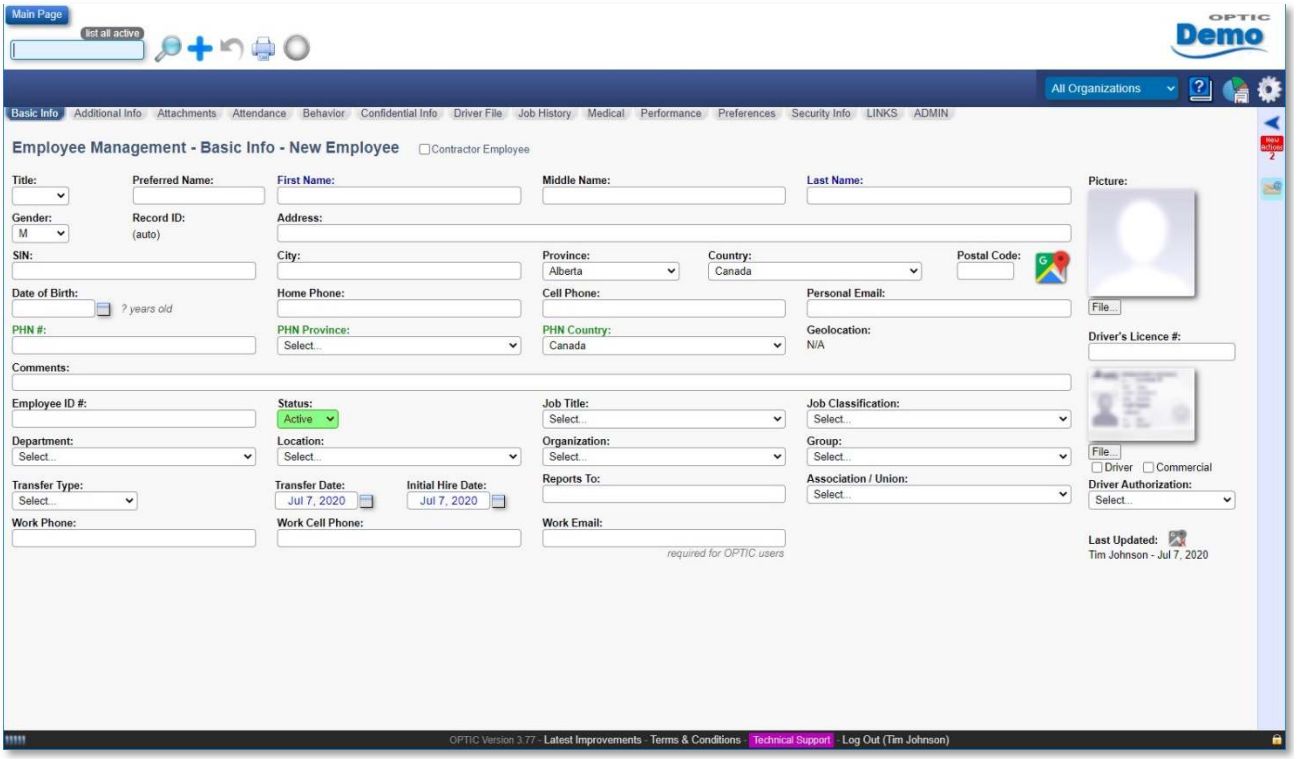
Below are just a few screenshots, the application having many areas to explore, the main characteristics being an ***overall consistency***, e.g. if learning to operate in a particular module (*Awards & Incentives, Contractor Management, Employee Management*, etc.), a similar approach is in all other modules. *Online Help, Reports and Settings* can be accessed from top blue bar (right side) of any main module.

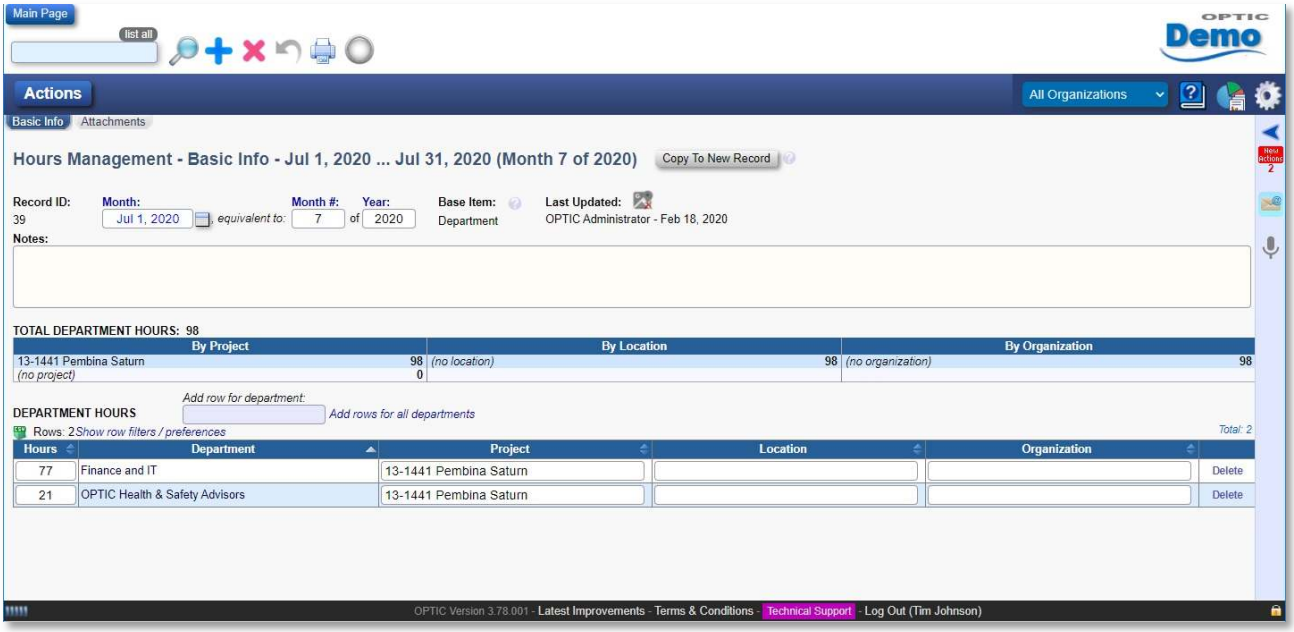
Also, *Technical Support* can be contacted anytime using the purple button (link) in the footer of any main module, or from main page.

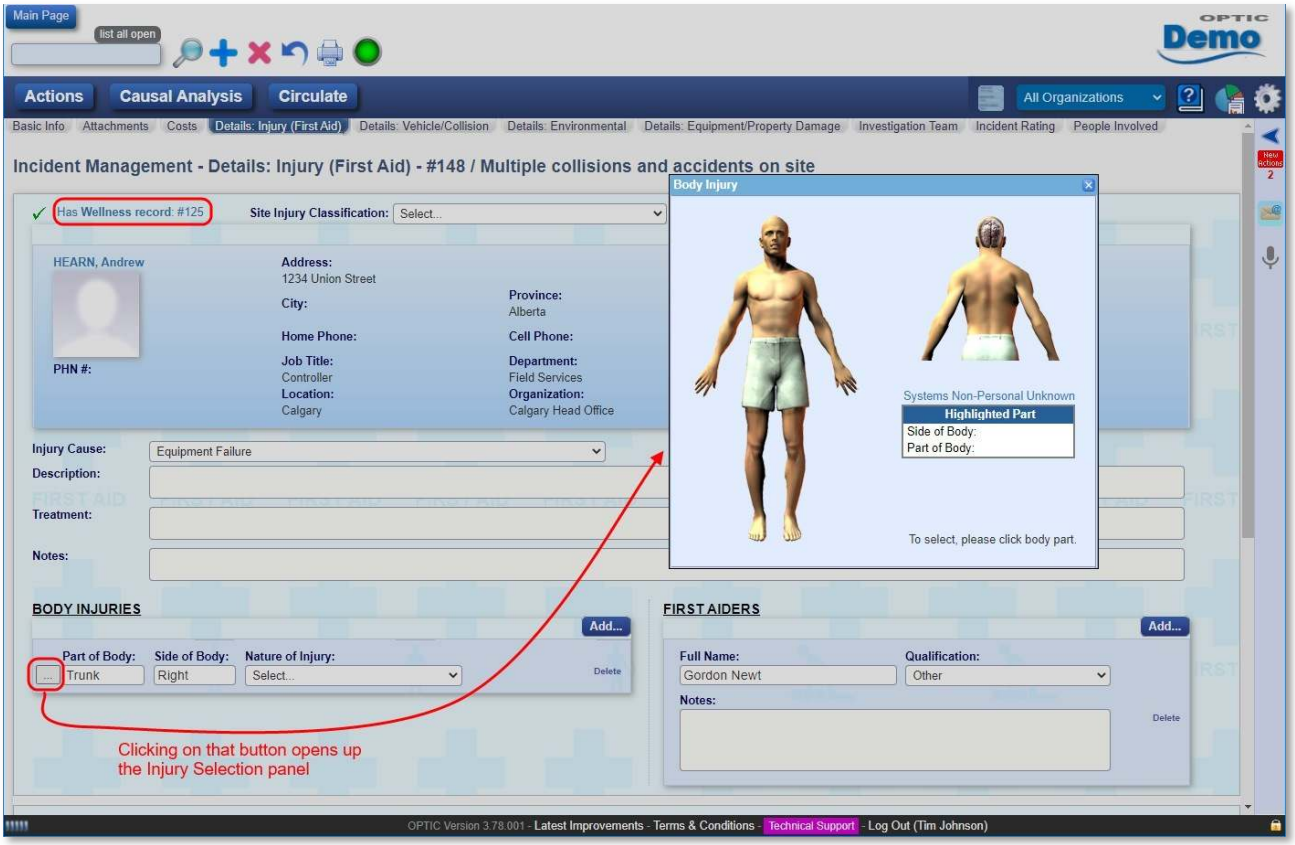
Main OPTIC page:

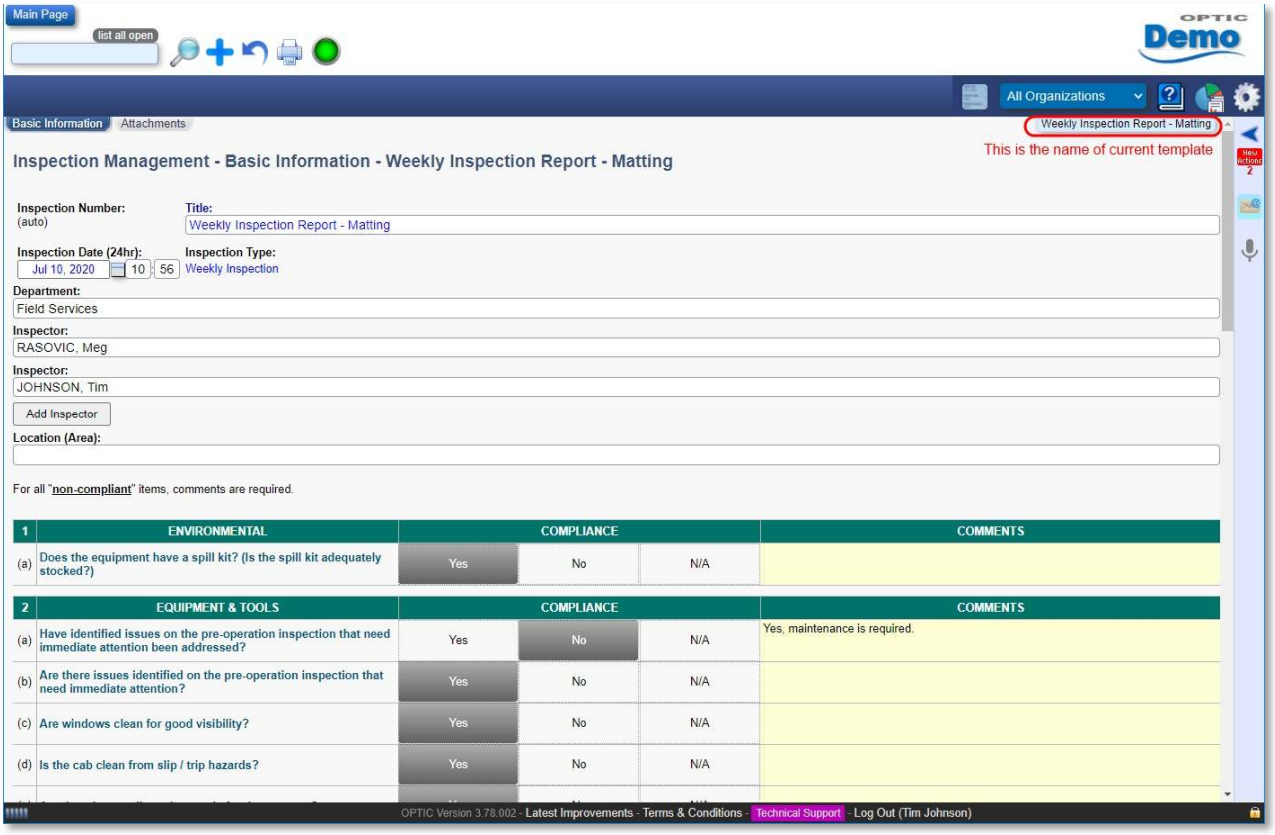

Main Page
list all active
OPTIC Demo
Browse
Transactions
Inventory
All Organizations
Awards & Incentives - Basic Info - Tim Johnson
Employee: JOHNSON, Tim
Points: 28
Status: Active
Job Title: TEST
Job Classification: Admin
Reports To:
Department: Field Services
Location: USA Operations
Organization: New Organization
Association / Union:
Group:
Show Transactions From:
To:
Hide System Transactions
Refresh
TRANSACTIONS
Add...
Date | Type | Item | Qty | Payment | Notes | By
Jul 20, 2018 | Item | Movie Ticket - Black Caps | 1 | | for attending July 20 Safety Mtg | David Rocks
Jul 20, 2018 | Item | Red Baseball Cap - 2-Week | -1 | Points | Selected incorrect item, reversing trip to Africa | David Rocks
Jul 20, 2018 | Points | | 1000 | | Selected incorrect item, reversing trip to Africa | David Rocks
Jul 20, 2018 | Item | Red Baseball Cap - 2-Week | 1 | Points | redeem safety meeting for trip | David Rocks
Jul 20, 2018 | Points | | -1000 | | redeem safety meeting for trip | Tara Beck
Jul 20, 2018 | Points | | 3 | | Attended safety mtg on July 19, 2018 | Reeva Williams
Feb 2, 2012 | Points | | 25 | | January 2012 monthly bonus - some notes | Morris Quartz
May 30, 2011 | Points | | 0 | | System generated | Jonathan Millis
Delete Edit
OPTIC Version 3.78.001 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

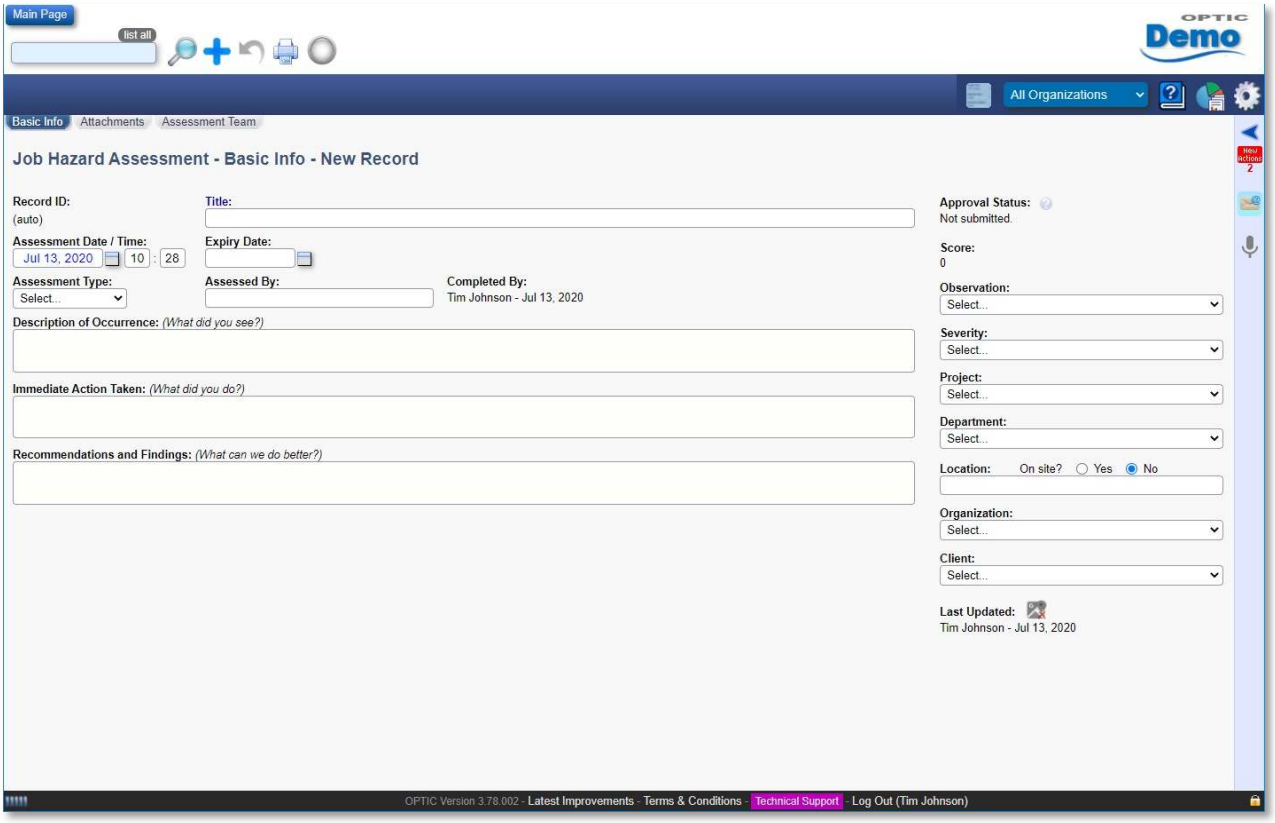

Main Page
list all active
OPTIC Demo
All Organizations
Basic Info | Attachments | Clearance | COI | COR | GST | NDA | QA / QC | Questionnaire | TRIF | WCB | CONTACTS | EMPLOYEES
Contractor Management - Basic Info - New Record
Contractor ID: (auto)
Name:
Type: Select...
Vendor Code:
Requested By:
Status: Active
Employees: 0
Exempt? Yes
Affiliations
Add...
Service Provided:
Address:
City:
Province: Alberta
Country: Canada
Postal Code:
Phone:
Fax:
Organization: Select...
Work Performed:
MAIN CONTACT (contacts managed under CONTACTS tab)
Name: Work Phone: Cell Phone: Email: Fax: Division / Branch:
HSE Approval
Provisionally Approved
QA/QC Approval
Not Approved
Final Approval
Suspended
Last Updated: Tim Johnson - Jul 9, 2020
Notes:
OPTIC Version 3.78.001 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

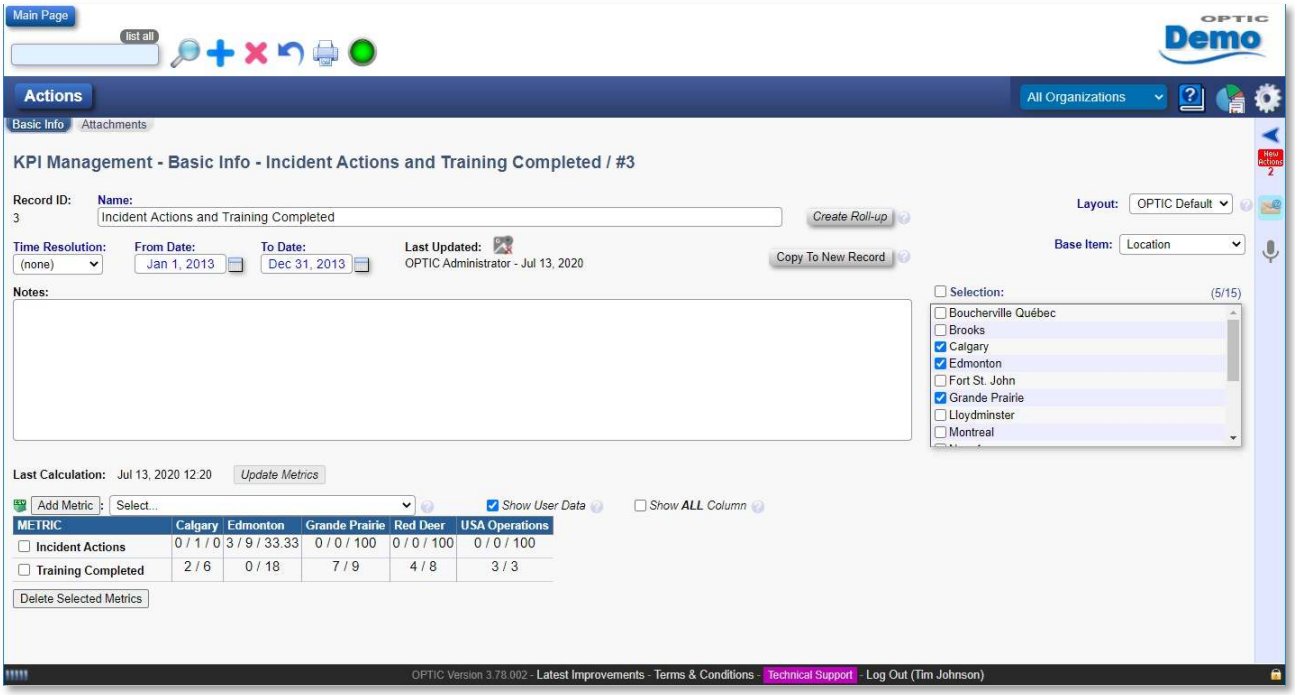

Main Page
list all active
OPTIC Demo
All Organizations
Basic Info
Additional Info
Attachments
Attendance
Behavior
Confidential Info
Driver File
Job History
Medical
Performance
Preferences
Security Info
LINKS
ADMIN
Employee Management - Basic Info - New Employee
Contractor Employee
Title:
Preferred Name:
First Name:
Middle Name:
Last Name:
Picture:
Gender:
Record ID:
(auto)
Address:
SIN:
City:
Province:
Alberta
Country:
Canada
Postal Code:
Date of Birth:
? years old
Home Phone:
Cell Phone:
Personal Email:
PHN #:
PHN Province:
Select...
PHN Country:
Canada
Geolocation:
N/A
Driver's Licence #:
Comments:
Employee ID #:
Status:
Active
Job Title:
Job Classification:
Department:
Location:
Organization:
Group:
Transfer Type:
Transfer Date:
Jul 7, 2020
Initial Hire Date:
Jul 7, 2020
Reports To:
Association / Union:
Driver Authorization:
Work Phone:
Work Cell Phone:
Work Email:
required for OPTIC users
Last Updated:
Tim Johnson - Jul 7, 2020
File...
Driver
Commercial
OPTIC Version 3.77 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

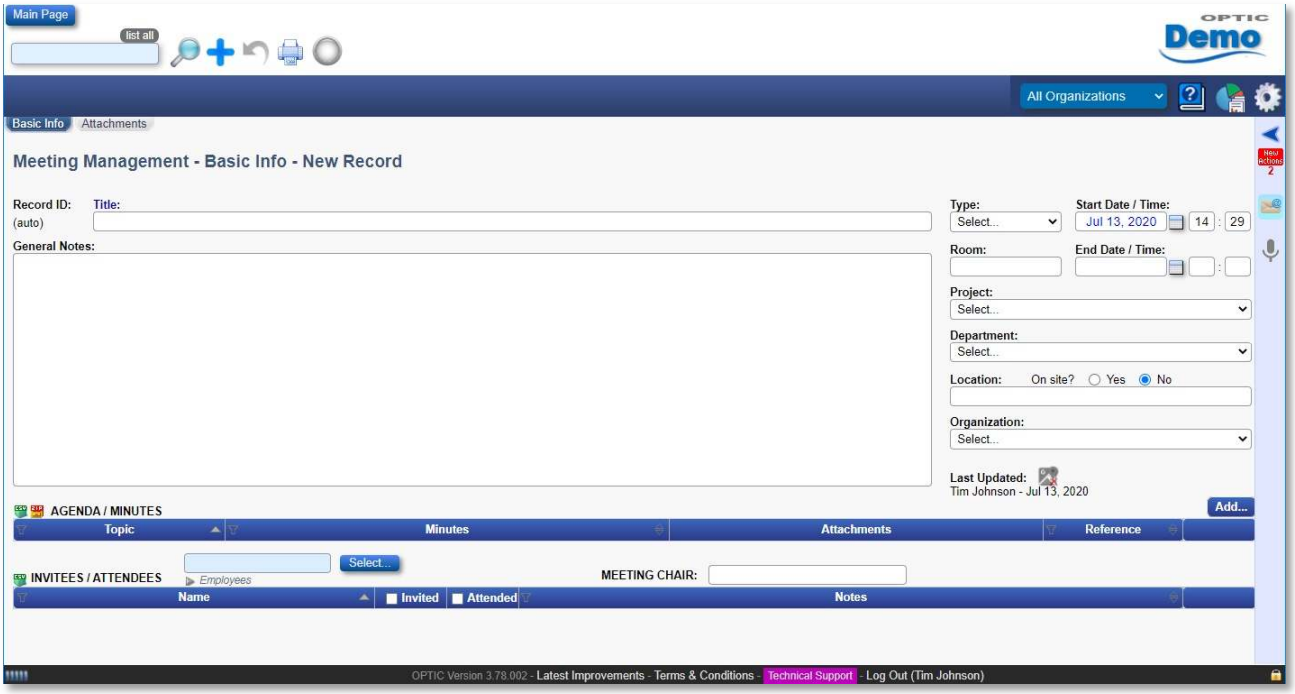

Main Page
list all
OPTIC Demo
Actions
All Organizations
Basic Info
Attachments
Hours Management - Basic Info - Jul 1, 2020 ... Jul 31, 2020 (Month 7 of 2020)
Copy To New Record
Record ID:
39
Month:
Jul 1, 2020
equivalent to:
Month #:
7
of
Year:
2020
Base Item:
Department
Last Updated:
OPTIC Administrator - Feb 18, 2020
Notes:
TOTAL DEPARTMENT HOURS: 98
By Project
13-1441 Pembina Saturn 98
(no project) 0
By Location
(no location) 98
By Organization
(no organization) 98
DEPARTMENT HOURS
Add row for department:
Add rows for all departments
Rows: 2 Show row filters / preferences
Total: 2
Hours
Department
Project
Location
Organization
77
Finance and IT
13-1441 Pembina Saturn
Delete
21
OPTIC Health & Safety Advisors
13-1441 Pembina Saturn
Delete
OPTIC Version 3.78.001 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

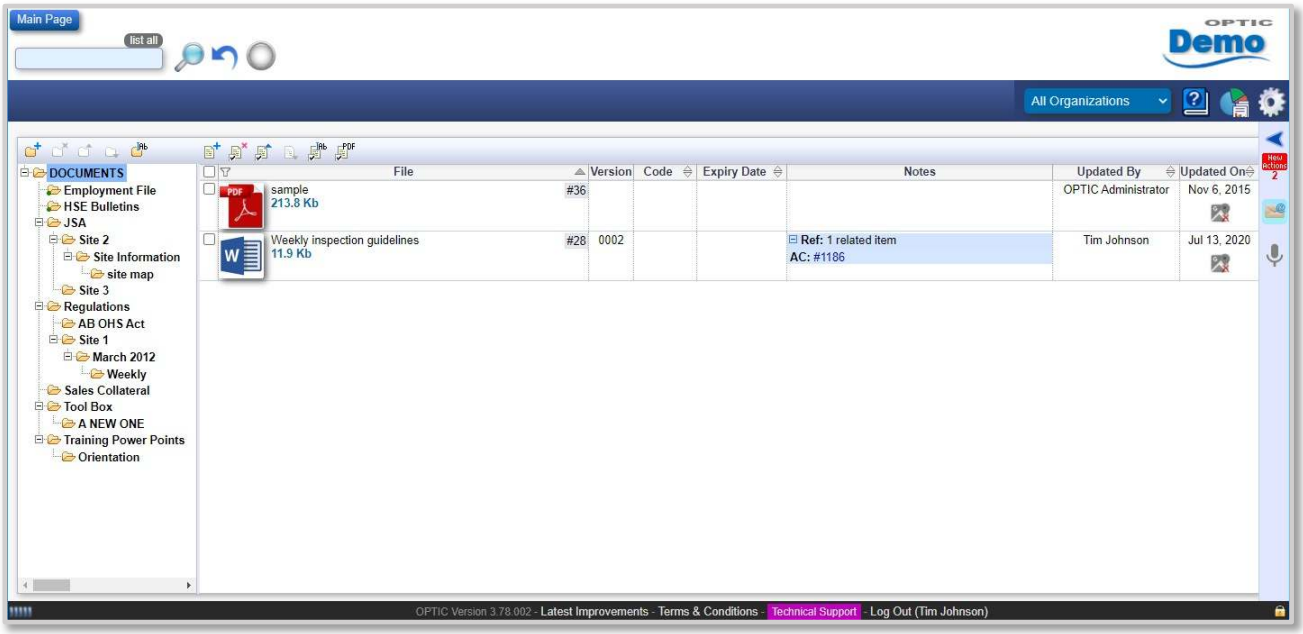

Main Page
list all open
Actions
Causal Analysis
Circulate
All Organizations
Basic Info
Attachments
Costs
Details: Injury (First Aid)
Details: Vehicle/Collision
Details: Environmental
Details: Equipment/Property Damage
Investigation Team
Incident Rating
People Involved
Incident Management - Details: Injury (First Aid) - #148 / Multiple collisions and accidents on site
Has Wellness record: #125
Site Injury Classification:
Select...
HEARN, Andrew
Address:
1234 Union Street
City:
Province:
Alberta
Home Phone:
Cell Phone:
PHN #:
Job Title:
Controller
Department:
Field Services
Location:
Calgary
Organization:
Calgary Head Office
Injury Cause:
Equipment Failure
Description:
Treatment:
Notes:
BODY INJURIES
Add...
Part of Body:
Side of Body:
Nature of Injury:
Trunk
Right
Select...
Delete
FIRST AIDERS
Full Name:
Gordon Newt
Qualification:
Other
Notes:
Body Injury
Systems Non-Personal Unknown
Highlighted Part
Side of Body:
Part of Body:
To select, please click body part.
Clicking on that button opens up
the Injury Selection panel
OPTIC Version 3.78.001 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

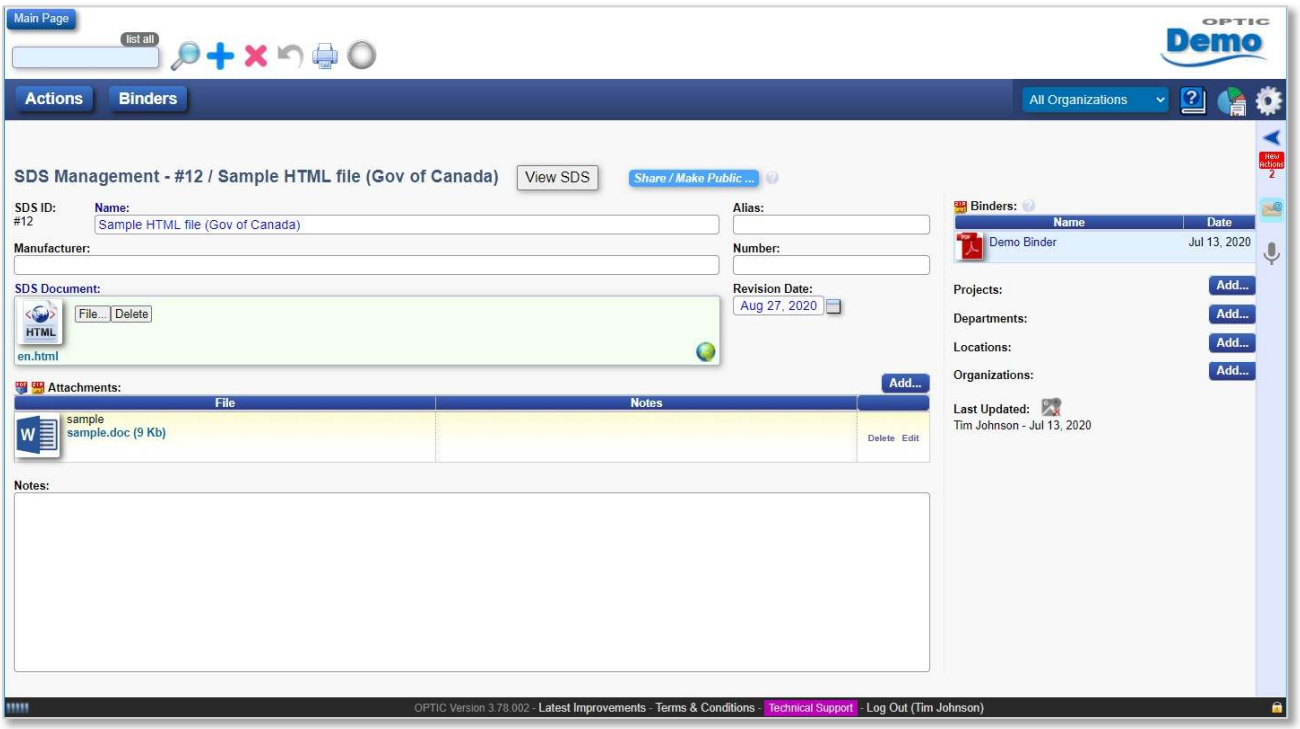

Main Page
list all open
OPTIC Demo
All Organizations
Basic Information
Attachments
Weekly Inspection Report - Matting
This is the name of current template
Inspection Management - Basic Information - Weekly Inspection Report - Matting
Inspection Number: (auto)
Title: Weekly Inspection Report - Matting
Inspection Date (24hr): Jul 10, 2020 10 56
Inspection Type: Weekly Inspection
Department: Field Services
Inspector: RASOVIC, Meg
Inspector: JOHNSON, Tim
Add Inspector
Location (Area):
For all "non-compliant" items, comments are required.
1 ENVIRONMENTAL COMPLIANCE COMMENTS
(a) Does the equipment have a spill kit? (Is the spill kit adequately stocked?) Yes No N/A
2 EQUIPMENT & TOOLS COMPLIANCE COMMENTS
(a) Have identified issues on the pre-operation inspection that need immediate attention been addressed? Yes No N/A Yes, maintenance is required.
(b) Are there issues identified on the pre-operation inspection that need immediate attention? Yes No N/A
(c) Are windows clean for good visibility? Yes No N/A
(d) Is the cab clean from slip / trip hazards? Yes No N/A
OPTIC Version 3.78.002 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

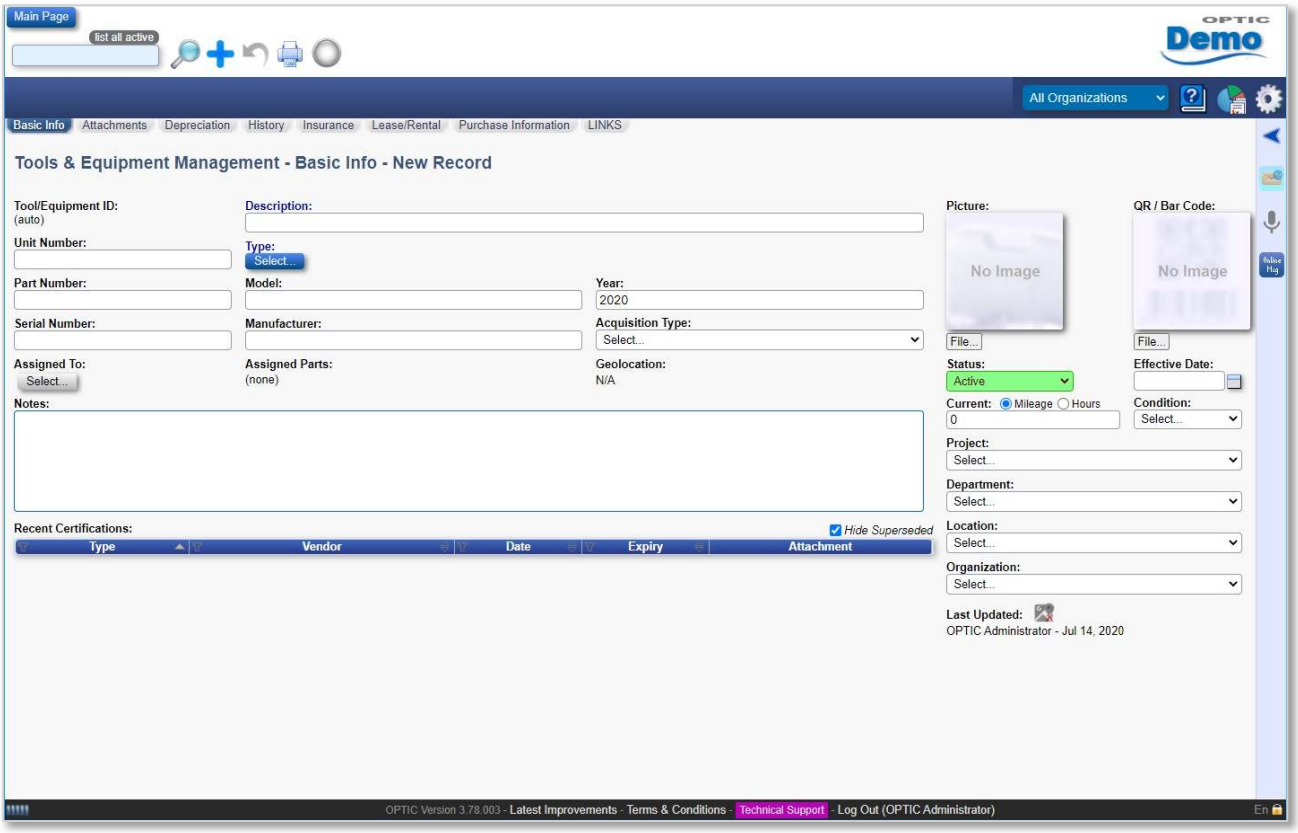

Main Page
list all
OPTIC Demo
All Organizations
Basic Info
Attachments
Assessment Team
Job Hazard Assessment - Basic Info - New Record
Record ID: (auto)
Title:
Assessment Date / Time: Jul 13, 2020 10 : 28
Expiry Date:
Assessment Type: Select...
Assessed By:
Completed By: Tim Johnson - Jul 13, 2020
Description of Occurrence: (What did you see?)
Immediate Action Taken: (What did you do?)
Recommendations and Findings: (What can we do better?)
Approval Status: Not submitted.
Score: 0
Observation: Select...
Severity: Select...
Project: Select...
Department: Select...
Location: On site? Yes No
Organization: Select...
Client: Select...
Last Updated: Tim Johnson - Jul 13, 2020
OPTIC Version 3.78.002 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

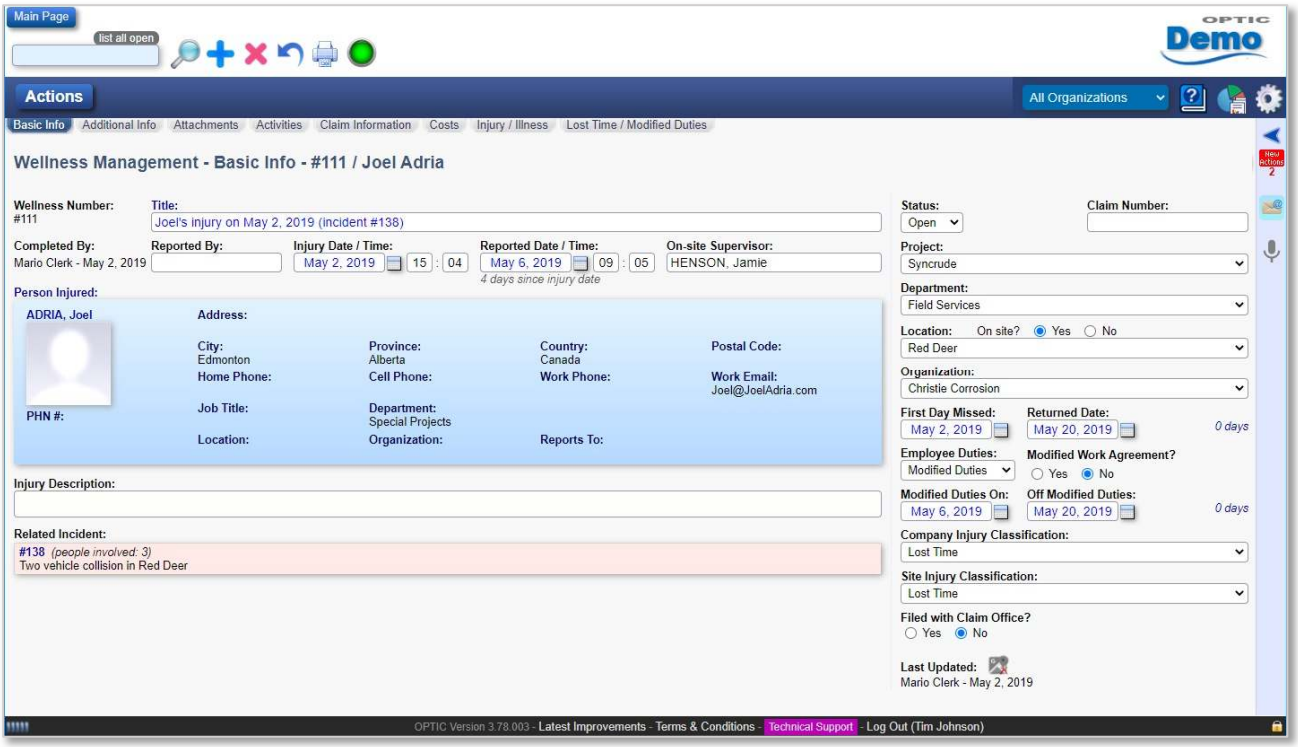

Main Page
list all
OPTIC Demo
Actions
All Organizations
Basic Info
Attachments
KPI Management - Basic Info - Incident Actions and Training Completed / #3
Record ID:
3
Name:
Incident Actions and Training Completed
Create Roll-up
Layout:
OPTIC Default
Time Resolution:
(none)
From Date:
Jan 1, 2013
To Date:
Dec 31, 2013
Last Updated:
OPTIC Administrator - Jul 13, 2020
Copy To New Record
Base Item:
Location
Notes:
Selection:
(5/15)
Boucherville Québec
Brooks
Calgary
Edmonton
Fort St. John
Grande Prairie
Lloydminster
Montreal
Last Calculation:
Jul 13, 2020 12:20
Update Metrics
Add Metric
Select...
Show User Data
Show ALL Column
METRIC
Calgary
Edmonton
Grande Prairie
Red Deer
USA Operations
Incident Actions
0 / 1 / 0
3 / 9 / 33.33
0 / 0 / 100
0 / 0 / 100
0 / 0 / 100
Training Completed
2 / 6
0 / 18
7 / 9
4 / 8
3 / 3
Delete Selected Metrics
OPTIC Version 3.78.002 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

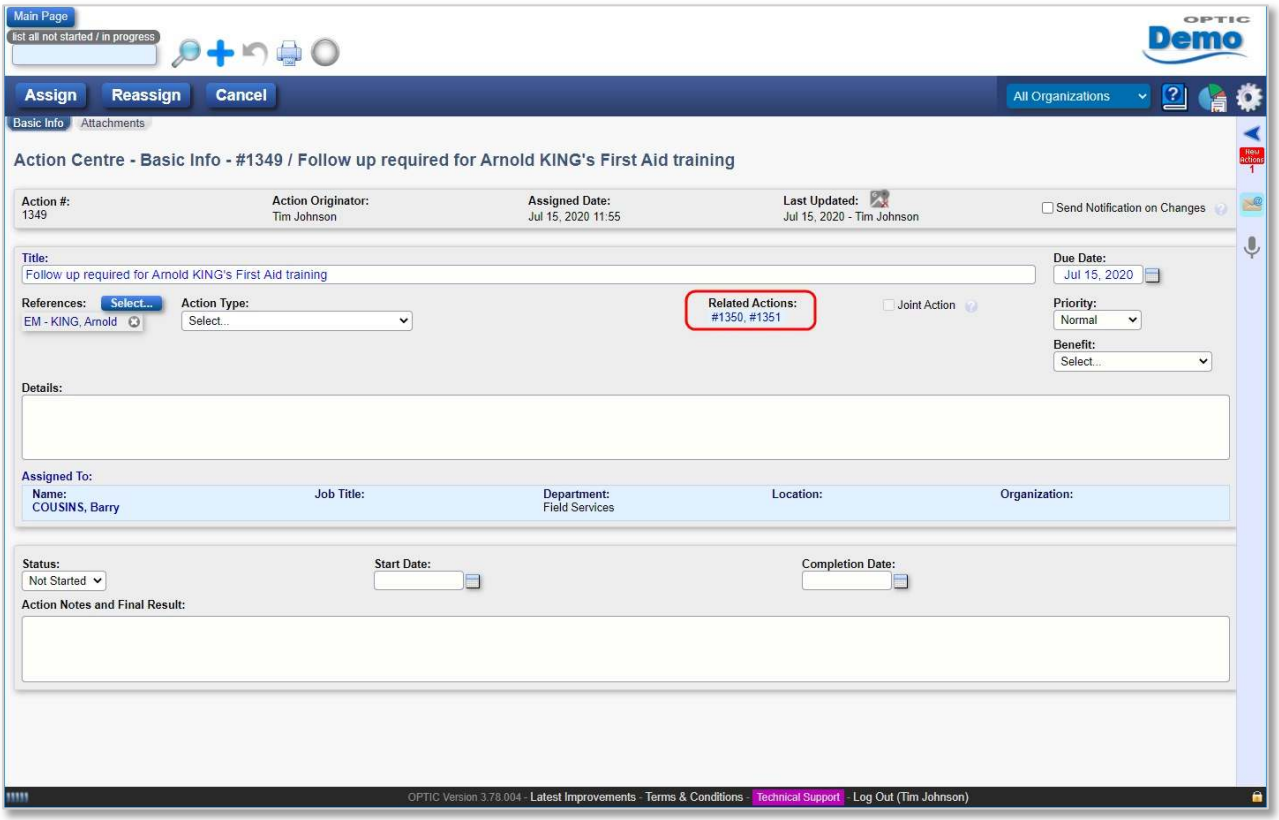

Main Page
list all
OPTIC Demo
All Organizations
Basic Info
Attachments
Meeting Management - Basic Info - New Record
Record ID:
(auto)
Title:
Type:
Select...
Start Date / Time:
Jul 13, 2020
14
29
General Notes:
Room:
End Date / Time:
Project:
Select...
Department:
Select...
Location:
On site?
Yes
No
Organization:
Select...
Last Updated:
Tim Johnson - Jul 13, 2020
AGENDA / MINUTES
Add...
Topic
Minutes
Attachments
Reference
INVITEES / ATTENDEES
Select...
Employees
MEETING CHAIR:
Name
Invited
Attended
Notes
OPTIC Version 3.78.002 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

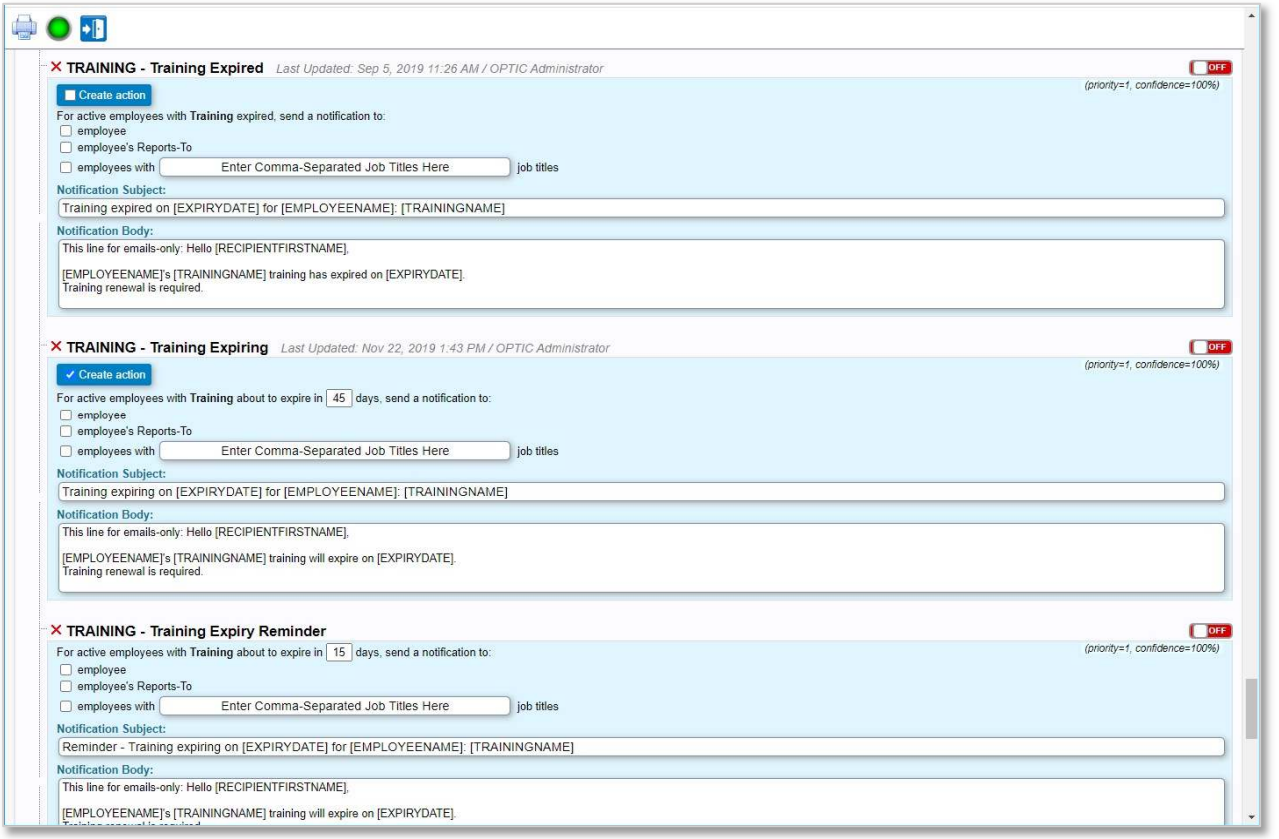

Main Page
list all
OPTIC Demo
All Organizations
DOCUMENTS
Employment File
HSE Bulletins
JSA
Site 2
Site Information
site map
Site 3
Regulations
AB OHS Act
Site 1
March 2012
Weekly
Sales Collateral
Tool Box
A NEW ONE
Training Power Points
Orientation
File
Version
Code
Expiry Date
Notes
Updated By
Updated On
sample
213.8 Kb
#36
OPTIC Administrator
Nov 6, 2015
Weekly inspection guidelines
11.9 Kb
#28
0002
Ref: 1 related item
AC: #1186
Tim Johnson
Jul 13, 2020
OPTIC Version 3.78.002 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

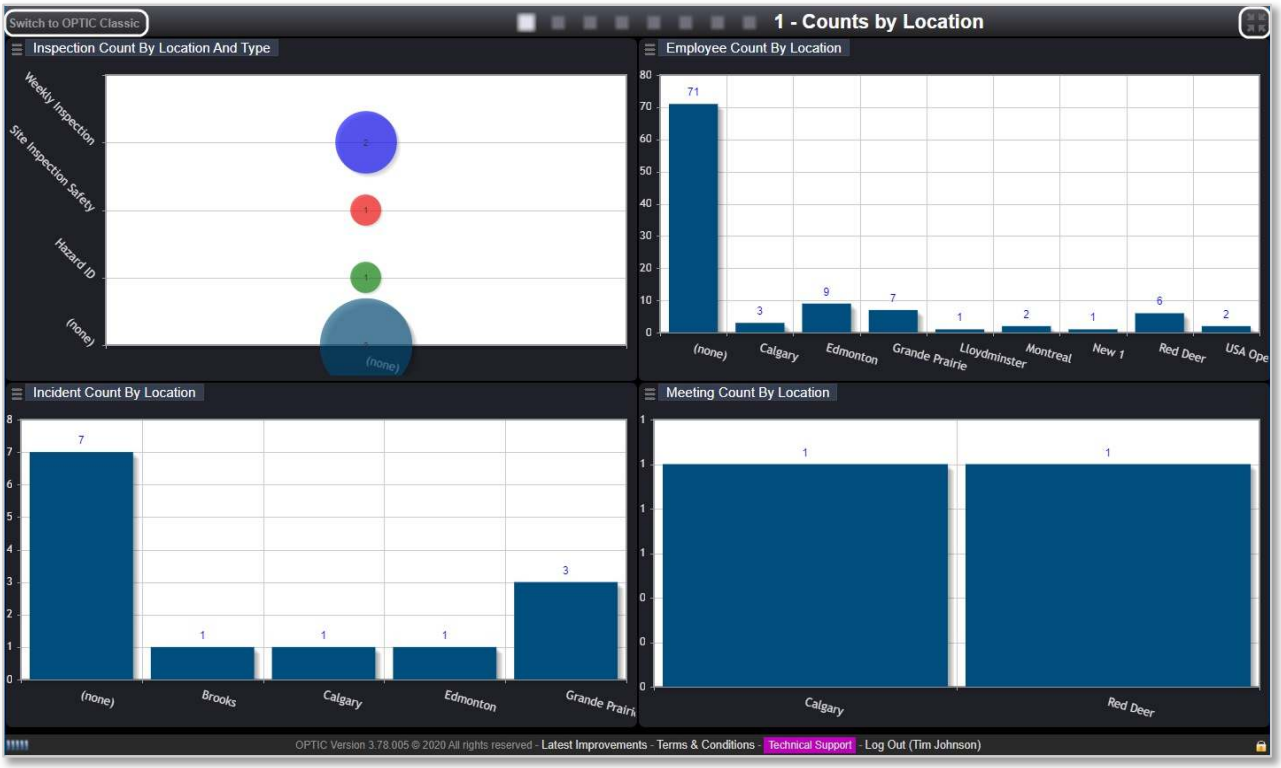

Main Page
list all
OPTIC Demo
Actions
Binders
All Organizations
SDS Management - #12 / Sample HTML file (Gov of Canada)
View SDS
Share / Make Public ...
SDS ID:
#12
Name:
Sample HTML file (Gov of Canada)
Alias:
Manufacturer:
Number:
SDS Document:
File...
Delete
HTML
en.html
Revision Date:
Aug 27, 2020
Attachments:
Add...
File
Notes
sample
sample.doc (9 Kb)
Delete
Edit
Notes:
Binders:
Name
Date
Demo Binder
Jul 13, 2020
Projects:
Departments:
Locations:
Organizations:
Add...
Last Updated:
Tim Johnson - Jul 13, 2020
OPTIC Version 3.78.002 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

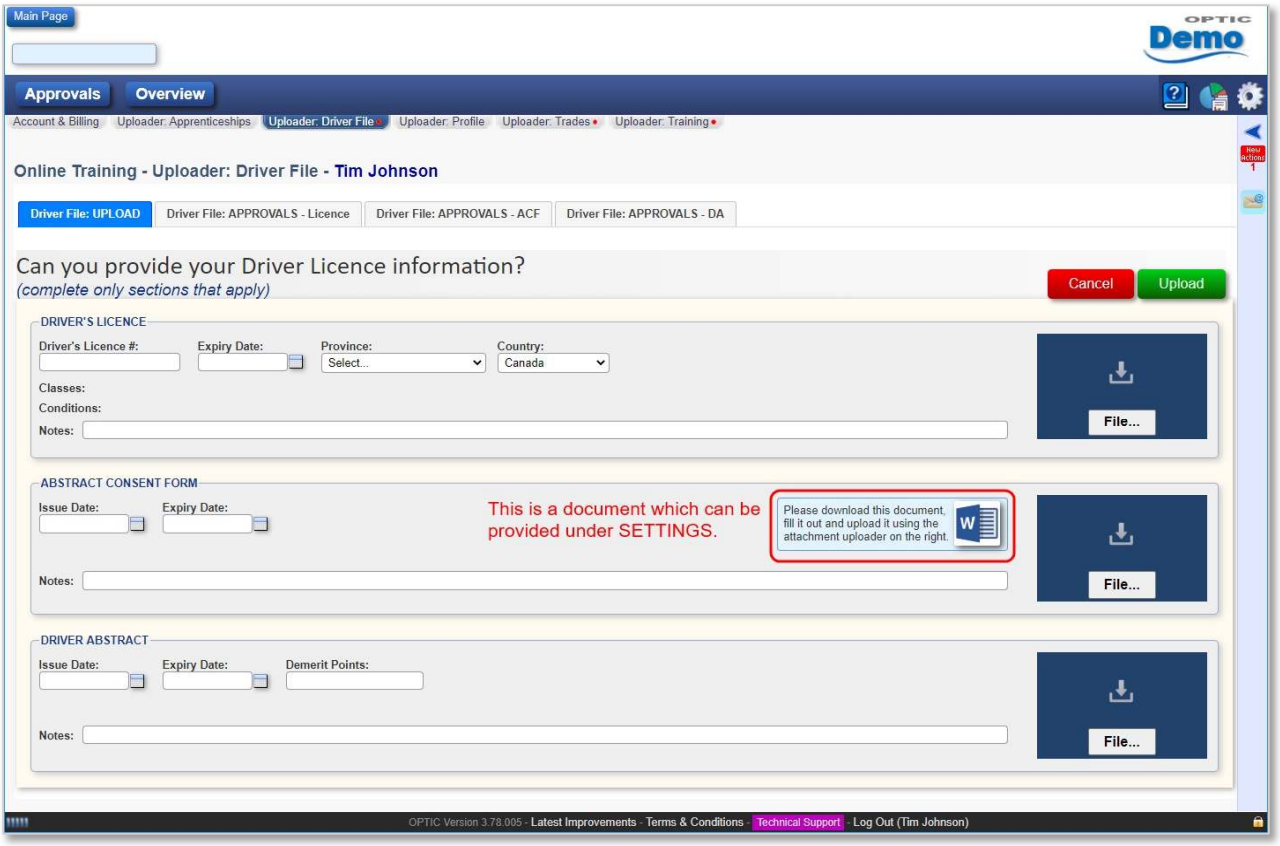

Main Page
list all active
OPTIC Demo
All Organizations
Basic Info
Attachments
Depreciation
History
Insurance
Lease/Rental
Purchase Information
LINKS
Tools & Equipment Management - Basic Info - New Record
Tool/Equipment ID:
(auto)
Description:
Unit Number:
Type:
Select...
Part Number:
Model:
Year:
2020
Serial Number:
Manufacturer:
Acquisition Type:
Select...
Assigned To:
Select...
Assigned Parts:
(none)
Geolocation:
N/A
Notes:
Picture:
No Image
File...
QR / Bar Code:
No Image
File...
Status:
Active
Effective Date:
Current:
Mileage
Hours
0
Condition:
Select...
Project:
Select...
Department:
Select...
Location:
Select...
Organization:
Select...
Last Updated:
OPTIC Administrator - Jul 14, 2020
Recent Certifications:
Hide Superseded
Type
Vendor
Date
Expiry
Attachment
OPTIC Version 3.78.003 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (OPTIC Administrator)

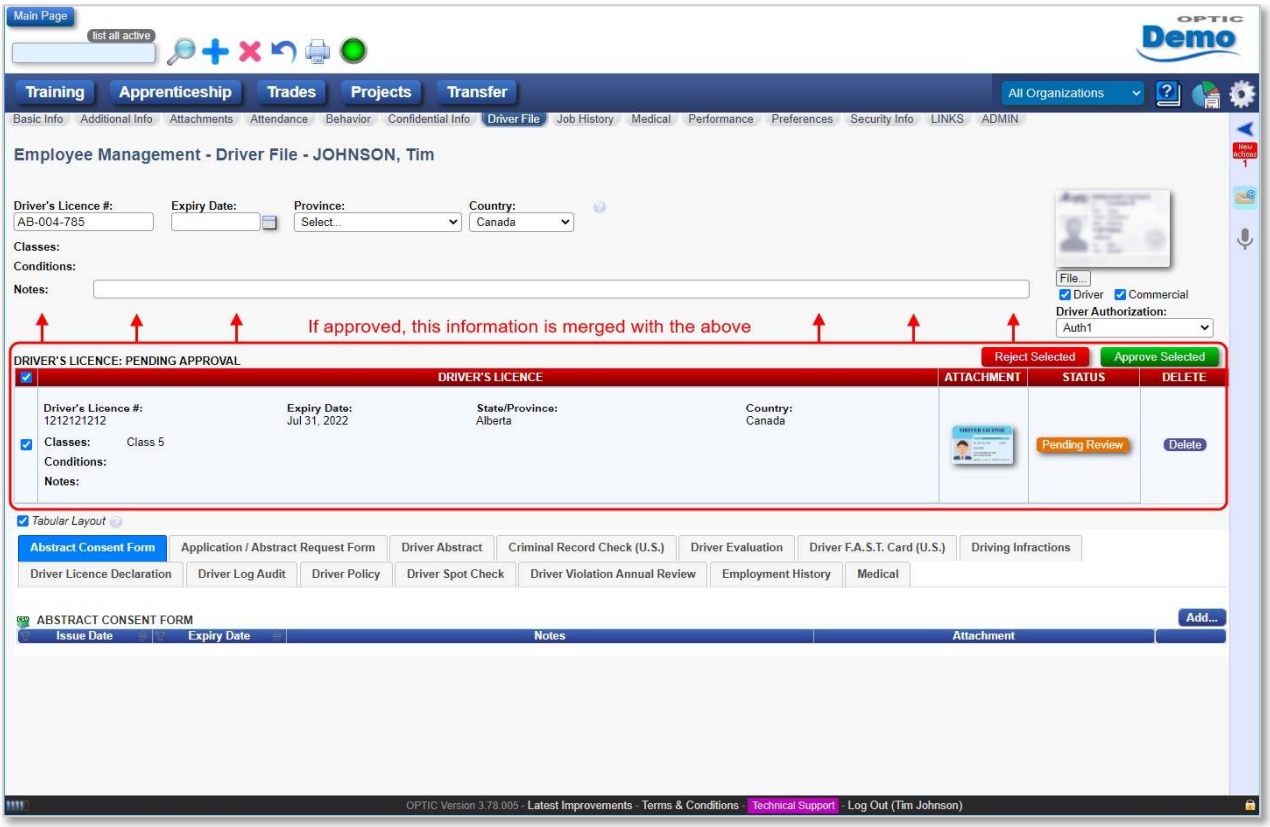

Main Page
list all open
OPTIC Demo
Actions
All Organizations
Basic Info
Additional Info
Attachments
Activities
Claim Information
Costs
Injury / Illness
Lost Time / Modified Duties
Wellness Management - Basic Info - #111 / Joel Adria
Wellness Number:
#111
Title:
Joel's injury on May 2, 2019 (incident #138)
Status:
Open
Claim Number:
Completed By:
Mario Clerk - May 2, 2019
Reported By:
Injury Date / Time:
May 2, 2019
15
04
Reported Date / Time:
May 6, 2019
09
05
4 days since injury date
On-site Supervisor:
HENSON, Jamie
Project:
Syncrude
Person Injured:
ADRIA, Joel
Address:
City:
Edmonton
Province:
Alberta
Country:
Canada
Postal Code:
Home Phone:
Cell Phone:
Work Phone:
Work Email:
Joel@JoelAdria.com
PHN #:
Job Title:
Department:
Special Projects
Location:
Organization:
Reports To:
Department:
Field Services
Location:
On site?
Yes
No
Red Deer
Organization:
Christie Corrosion
First Day Missed:
May 2, 2019
Returned Date:
May 20, 2019
0 days
Employee Duties:
Modified Duties
Modified Work Agreement?
Yes
No
Modified Duties On:
May 6, 2019
Off Modified Duties:
May 20, 2019
0 days
Injury Description:
Company Injury Classification:
Lost Time
Related Incident:
#138 (people involved: 3)
Two vehicle collision in Red Deer
Site Injury Classification:
Lost Time
Filed with Claim Office?
Yes
No
Last Updated:
Mario Clerk - May 2, 2019
OPTIC Version 3.78.003 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

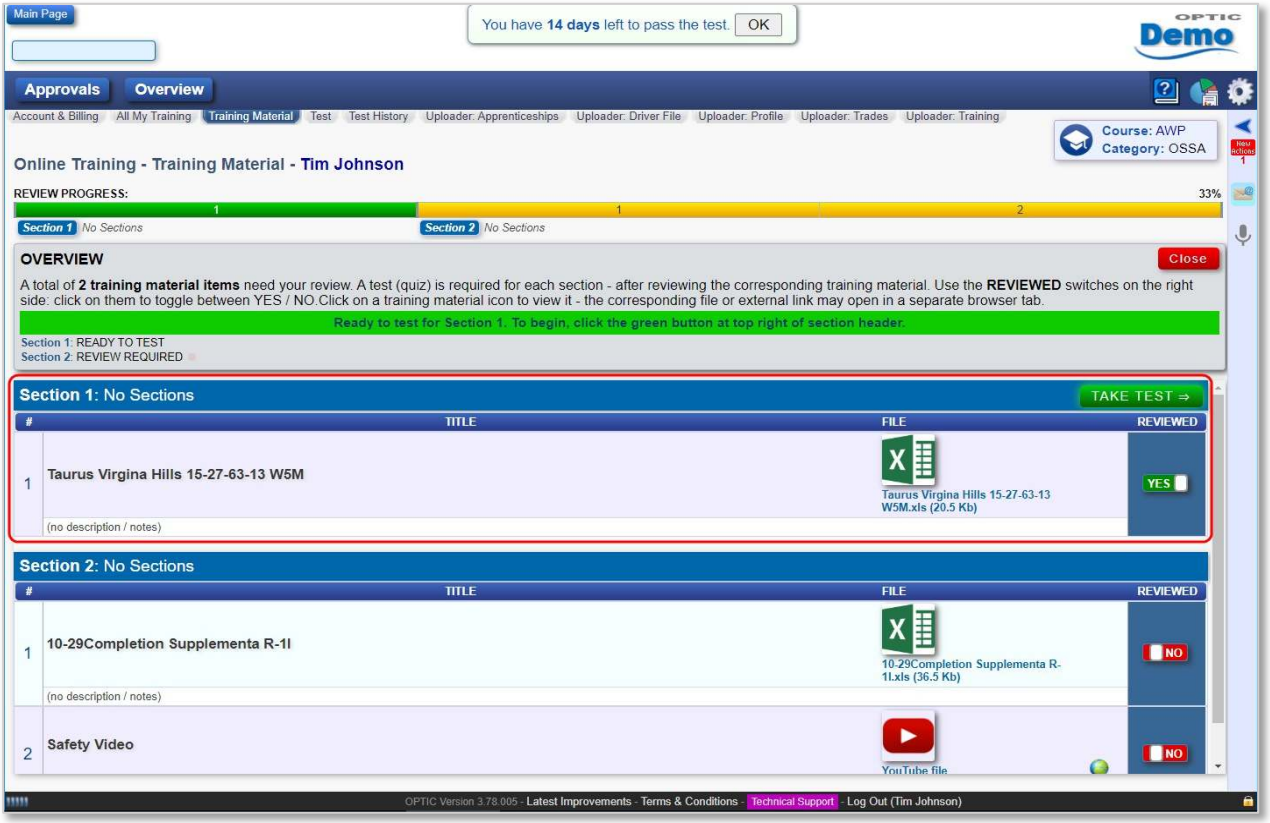

Main Page
list all not started / in progress
OPTIC Demo
Assign
Reassign
Cancel
All Organizations
Basic Info
Attachments
Action Centre - Basic Info - #1349 / Follow up required for Arnold KING's First Aid training
Action #: 1349
Action Originator: Tim Johnson
Assigned Date: Jul 15, 2020 11:55
Last Updated: Jul 15, 2020 - Tim Johnson
Send Notification on Changes
Title:
Follow up required for Arnold KING's First Aid training
Due Date: Jul 15, 2020
References: Select...
EM - KING, Arnold
Action Type: Select...
Related Actions: #1350, #1351
Joint Action
Priority: Normal
Benefit: Select...
Details:
Assigned To:
Name: COUSINS, Barry
Job Title:
Department: Field Services
Location:
Organization:
Status: Not Started
Start Date:
Completion Date:
Action Notes and Final Result:
OPTIC Version 3.78.004 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

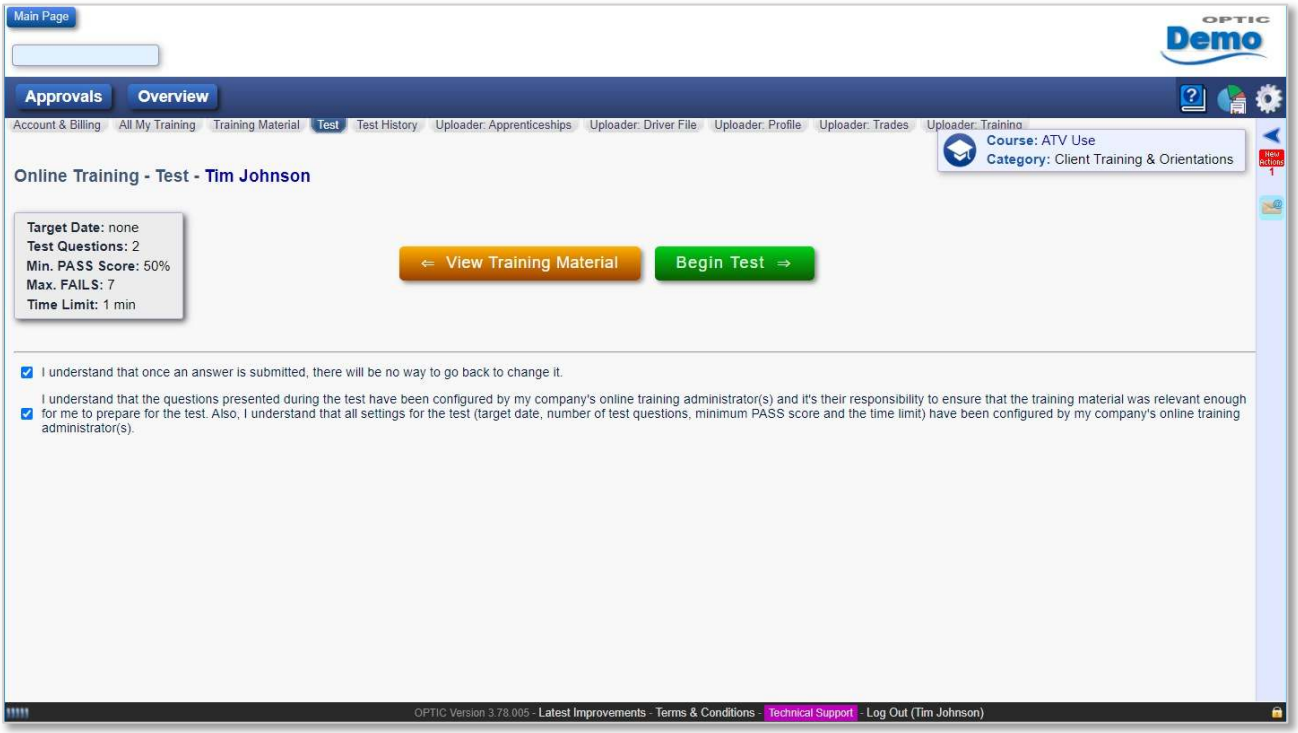

TRAINING - Training Expired
Last Updated: Sep 5, 2019 11:26 AM / OPTIC Administrator
OFF
(priority=1, confidence=100%)
Create action
For active employees with Training expired, send a notification to:
employee
employee's Reports-To
employees with Enter Comma-Separated Job Titles Here job titles
Notification Subject:
Training expired on [EXPIRYDATE] for [EMPLOYEENAME]: [TRAININGNAME]
Notification Body:
This line for emails-only: Hello [RECIPIENTFIRSTNAME],
[EMPLOYEENAME]'s [TRAININGNAME] training has expired on [EXPIRYDATE].
Training renewal is required.
TRAINING - Training Expiring
Last Updated: Nov 22, 2019 1:43 PM / OPTIC Administrator
OFF
(priority=1, confidence=100%)
Create action
For active employees with Training about to expire in 45 days, send a notification to:
employee
employee's Reports-To
employees with Enter Comma-Separated Job Titles Here job titles
Notification Subject:
Training expiring on [EXPIRYDATE] for [EMPLOYEENAME]: [TRAININGNAME]
Notification Body:
This line for emails-only: Hello [RECIPIENTFIRSTNAME],
[EMPLOYEENAME]'s [TRAININGNAME] training will expire on [EXPIRYDATE].
Training renewal is required.
TRAINING - Training Expiry Reminder
OFF
(priority=1, confidence=100%)
For active employees with Training about to expire in 15 days, send a notification to:
employee
employee's Reports-To
employees with Enter Comma-Separated Job Titles Here job titles
Notification Subject:
Reminder - Training expiring on [EXPIRYDATE] for [EMPLOYEENAME]: [TRAININGNAME]
Notification Body:
This line for emails-only: Hello [RECIPIENTFIRSTNAME],
[EMPLOYEENAME]'s [TRAININGNAME] training will expire on [EXPIRYDATE].


Switch to OPTIC Classic
1 - Counts by Location
Inspection Count By Location And Type
Weekly Inspection
Site Inspection Safety
Hazard ID
(none)
Employee Count By Location
71
3
9
7
1
2
1
6
2
(none)
Calgary
Edmonton
Grande Prairie
Lloydminster
Montreal
New 1
Red Deer
USA Ope
Incident Count By Location
7
1
1
1
3
(none)
Brooks
Calgary
Edmonton
Grande Prairi
Meeting Count By Location
1
1
Calgary
Red Deer
OPTIC Version 3.78.005 © 2020 All rights reserved - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

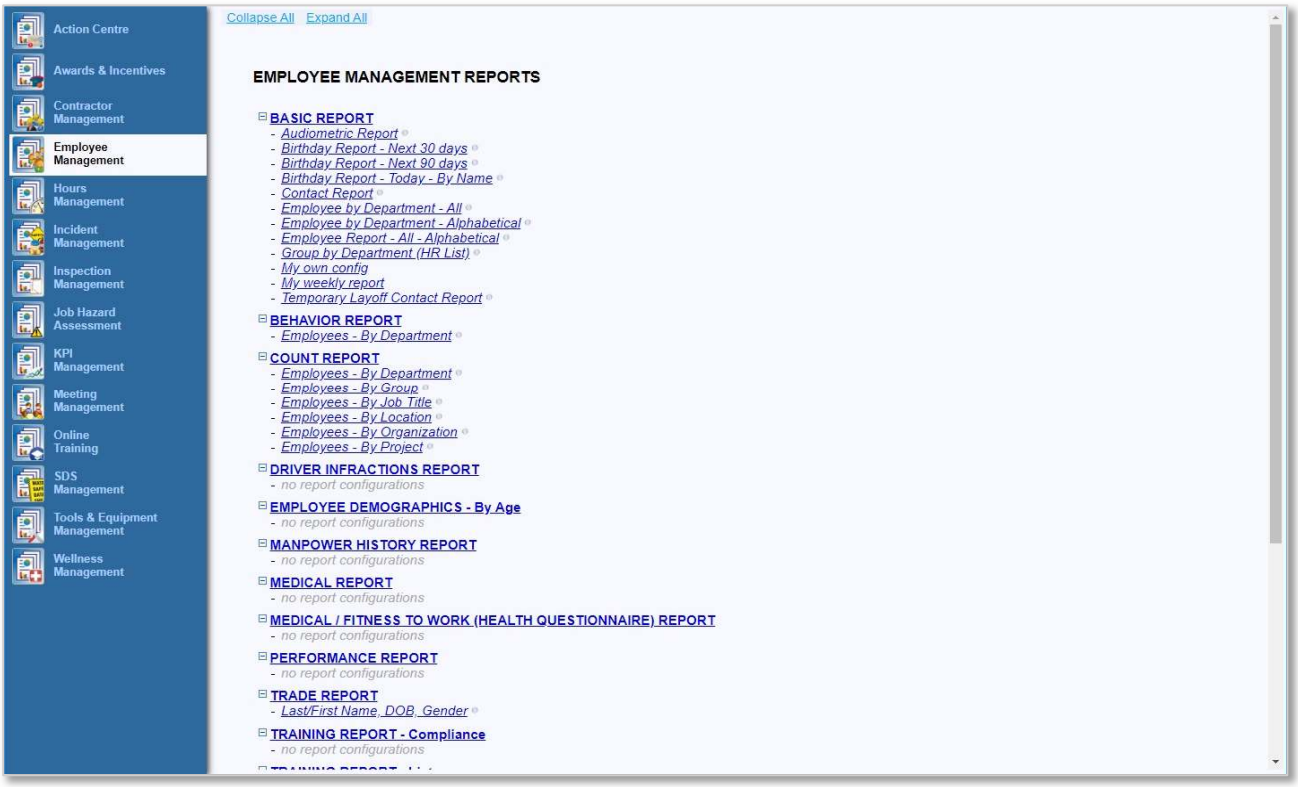

Main Page
OPTIC Demo
Approvals
Overview
Account & Billing
Uploader: Apprenticeships
Uploader: Driver File
Uploader: Profile
Uploader: Trades
Uploader: Training
Online Training - Uploader: Driver File - Tim Johnson
Driver File: UPLOAD
Driver File: APPROVALS - Licence
Driver File: APPROVALS - ACF
Driver File: APPROVALS - DA
Can you provide your Driver Licence information?
(complete only sections that apply)
Cancel
Upload
DRIVER'S LICENCE
Driver's Licence #:
Expiry Date:
Province:
Select...
Country:
Canada
Classes:
Conditions:
Notes:
File...
ABSTRACT CONSENT FORM
Issue Date:
Expiry Date:
This is a document which can be provided under SETTINGS.
Please download this document, fill it out and upload it using the attachment uploader on the right.
Notes:
File...
DRIVER ABSTRACT
Issue Date:
Expiry Date:
Demerit Points:
Notes:
File...
OPTIC Version 3.78.005 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

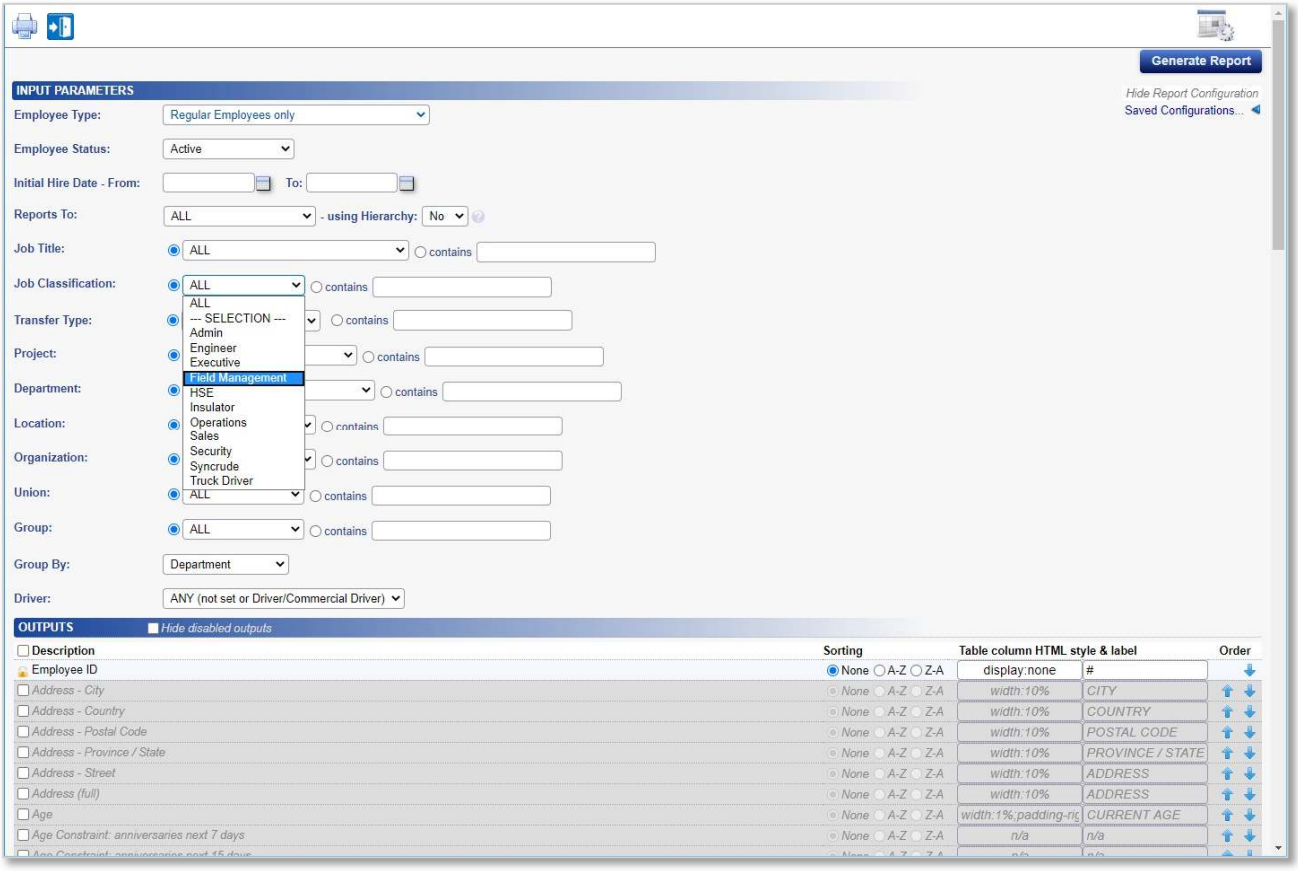

Main Page
Training
Apprenticeship
Trades
Projects
Transfer
All Organizations
Employee Management - Driver File - JOHNSON, Tim
Driver's Licence #:
AB-004-785
Expiry Date:
Province:
Country:
Canada
Classes:
Conditions:
Notes:
If approved, this information is merged with the above
DRIVER'S LICENCE: PENDING APPROVAL
Reject Selected
Approve Selected
DRIVER'S LICENCE
ATTACHMENT
STATUS
DELETE
Driver's Licence #:
1212121212
Expiry Date:
Jul 31, 2022
State/Province:
Alberta
Country:
Canada
Classes:
Class 5
Conditions:
Notes:
Pending Review
Delete
Tabular Layout
Abstract Consent Form
Application / Abstract Request Form
Driver Abstract
Criminal Record Check (U.S.)
Driver Evaluation
Driver F.A.S.T. Card (U.S.)
Driving Infractions
Driver Licence Declaration
Driver Log Audit
Driver Policy
Driver Spot Check
Driver Violation Annual Review
Employment History
Medical
ABSTRACT CONSENT FORM
Add...
Issue Date
Expiry Date
Notes
Attachment
OPTIC Version 3.78.005 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

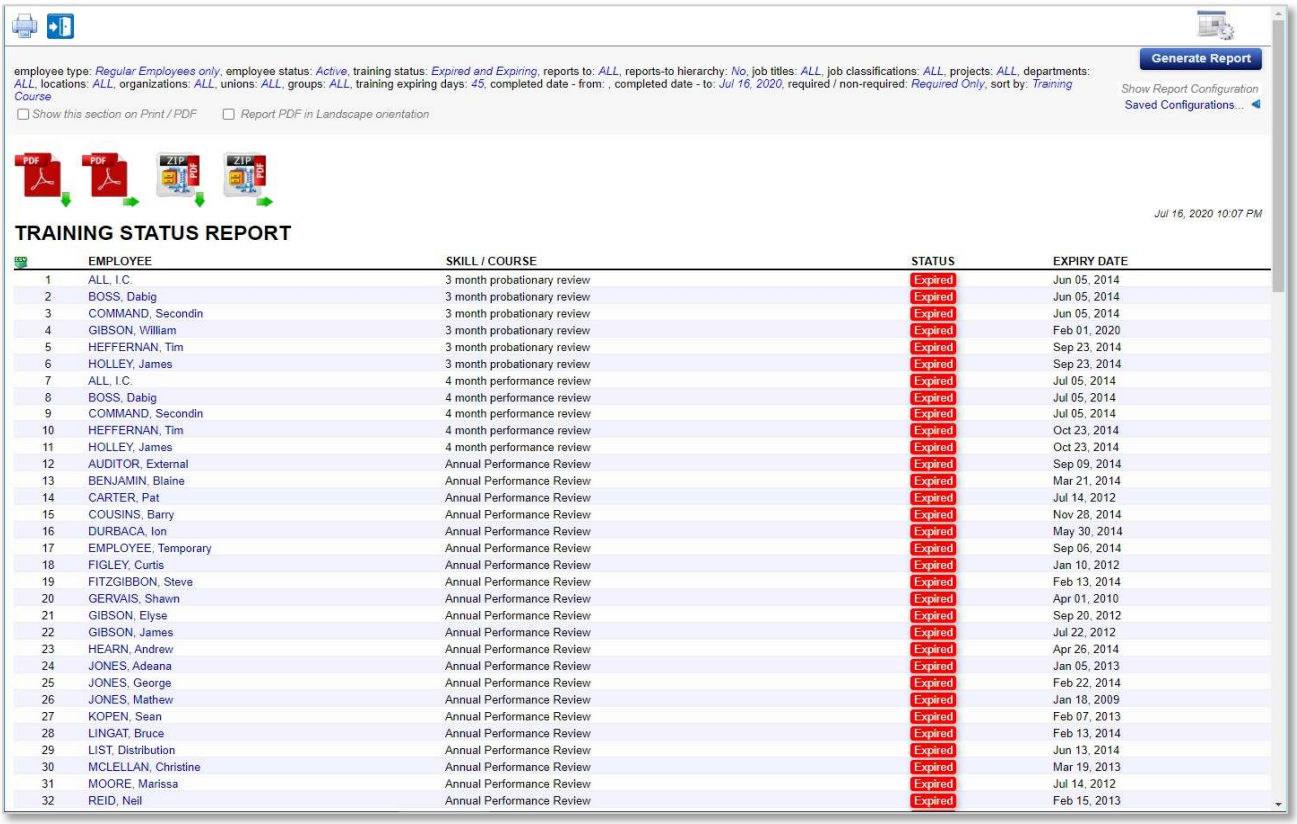

Main Page
You have 14 days left to pass the test.
OK
Approvals
Overview
Account & Billing
All My Training
Training Material
Test
Test History
Uploader: Apprenticeships
Uploader: Driver File
Uploader: Profile
Uploader: Trades
Uploader: Training
Course: AWP
Category: OSSA
Online Training - Training Material - Tim Johnson
REVIEW PROGRESS:
33%
Section 1 No Sections
Section 2 No Sections
OVERVIEW
Close
A total of 2 training material items need your review. A test (quiz) is required for each section - after reviewing the corresponding training material. Use the REVIEWED switches on the right side: click on them to toggle between YES / NO.Click on a training material icon to view it - the corresponding file or external link may open in a separate browser tab.
Ready to test for Section 1. To begin, click the green button at top right of section header.
Section 1: READY TO TEST
Section 2: REVIEW REQUIRED
Section 1: No Sections
TAKE TEST ⇒
#
TITLE
FILE
REVIEWED
1
Taurus Virgina Hills 15-27-63-13 W5M
Taurus Virgina Hills 15-27-63-13 W5M.xls (20.5 Kb)
YES
(no description / notes)
Section 2: No Sections
#
TITLE
FILE
REVIEWED
1
10-29Completion Supplementa R-1l
10-29Completion Supplementa R-1l.xls (36.5 Kb)
NO
(no description / notes)
2
Safety Video
YouTube file
NO
OPTIC Version 3.78.005 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)


Main Page
Demo
Approvals
Overview
Account & Billing
All My Training
Training Material
Test
Test History
Uploader: Apprenticeships
Uploader: Driver File
Uploader: Profile
Uploader: Trades
Uploader: Training
Course: ATV Use
Category: Client Training & Orientations
Online Training - Test - Tim Johnson
Target Date: none
Test Questions: 2
Min. PASS Score: 50%
Max. FAILS: 7
Time Limit: 1 min
⇐ View Training Material
Begin Test ⇒
I understand that once an answer is submitted, there will be no way to go back to change it.
I understand that the questions presented during the test have been configured by my company's online training administrator(s) and it's their responsibility to ensure that the training material was relevant enough for me to prepare for the test. Also, I understand that all settings for the test (target date, number of test questions, minimum PASS score and the time limit) have been configured by my company's online training administrator(s).
OPTIC Version 3.78.005 - Latest Improvements - Terms & Conditions - Technical Support - Log Out (Tim Johnson)

1 / 1
The OPTIC SYSTEM Online Training
www.theopticsystem.com
Demo
CERTIFICATE
Certificate Number: OLMS-17
Certificate Date: Jul 16, 2020
Expiry Date: Jul 16, 2021
Tim Johnson has successfully completed a program on:
ATV Use


Action Centre
Awards & Incentives
Contractor Management
Employee Management
Hours Management
Incident Management
Inspection Management
Job Hazard Assessment
KPI Management
Meeting Management
Online Training
SDS Management
Tools & Equipment Management
Wellness Management
Collapse All
Expand All
EMPLOYEE MANAGEMENT REPORTS
BASIC REPORT
Audiometric Report
Birthday Report - Next 30 days
Birthday Report - Next 90 days
Birthday Report - Today - By Name
Contact Report
Employee by Department - All
Employee by Department - Alphabetical
Employee Report - All - Alphabetical
Group by Department (HR List)
My own config
My weekly report
Temporary Layoff Contact Report
BEHAVIOR REPORT
Employees - By Department
COUNT REPORT
Employees - By Department
Employees - By Group
Employees - By Job Title
Employees - By Location
Employees - By Organization
Employees - By Project
DRIVER INFRACTIONS REPORT
no report configurations
EMPLOYEE DEMOGRAPHICS - By Age
no report configurations
MANPOWER HISTORY REPORT
no report configurations
MEDICAL REPORT
no report configurations
MEDICAL / FITNESS TO WORK (HEALTH QUESTIONNAIRE) REPORT
no report configurations
PERFORMANCE REPORT
no report configurations
TRADE REPORT
Last/First Name, DOB, Gender
TRAINING REPORT - Compliance
no report configurations


Generate Report
INPUT PARAMETERS
Hide Report Configuration
Saved Configurations...
Employee Type: Regular Employees only
Employee Status: Active
Initial Hire Date - From:
To:
Reports To: ALL - using Hierarchy: No
Job Title: ALL contains
Job Classification: ALL contains
ALL
--- SELECTION ---
Admin
Engineer
Executive
Field Management
HSE
Insulator
Operations
Sales
Security
Syncrude
Truck Driver
Transfer Type: contains
Project: contains
Department: contains
Location: contains
Organization: contains
Union: ALL contains
Group: ALL contains
Group By: Department
Driver: ANY (not set or Driver/Commercial Driver)
OUTPUTS
Hide disabled outputs
Description
Sorting
Table column HTML style & label
Order
Employee ID None A-Z Z-A display:none #
Address - City None A-Z Z-A width:10% CITY
Address - Country None A-Z Z-A width:10% COUNTRY
Address - Postal Code None A-Z Z-A width:10% POSTAL CODE
Address - Province / State None A-Z Z-A width:10% PROVINCE / STATE
Address - Street None A-Z Z-A width:10% ADDRESS
Address (full) None A-Z Z-A width:10% ADDRESS
Age None A-Z Z-A width:1%;padding-ri CURRENT AGE
Age Constraint: anniversaries next 7 days None A-Z Z-A n/a n/a



employee type: *Regular Employees only*, employee status: *Active*, training status: *Expired and Expiring*, reports to: *ALL*, reports-to hierarchy: *No*, job titles: *ALL*, job classifications: *ALL*, projects: *ALL*, departments: *ALL*, locations: *ALL*, organizations: *ALL*, unions: *ALL*, groups: *ALL*, training expiring days: *45*, completed date - from: , completed date - to: *Jul 16, 2020*, required / non-required: *Required Only*, sort by: *Training Course*

Generate Report

Show Report Configuration

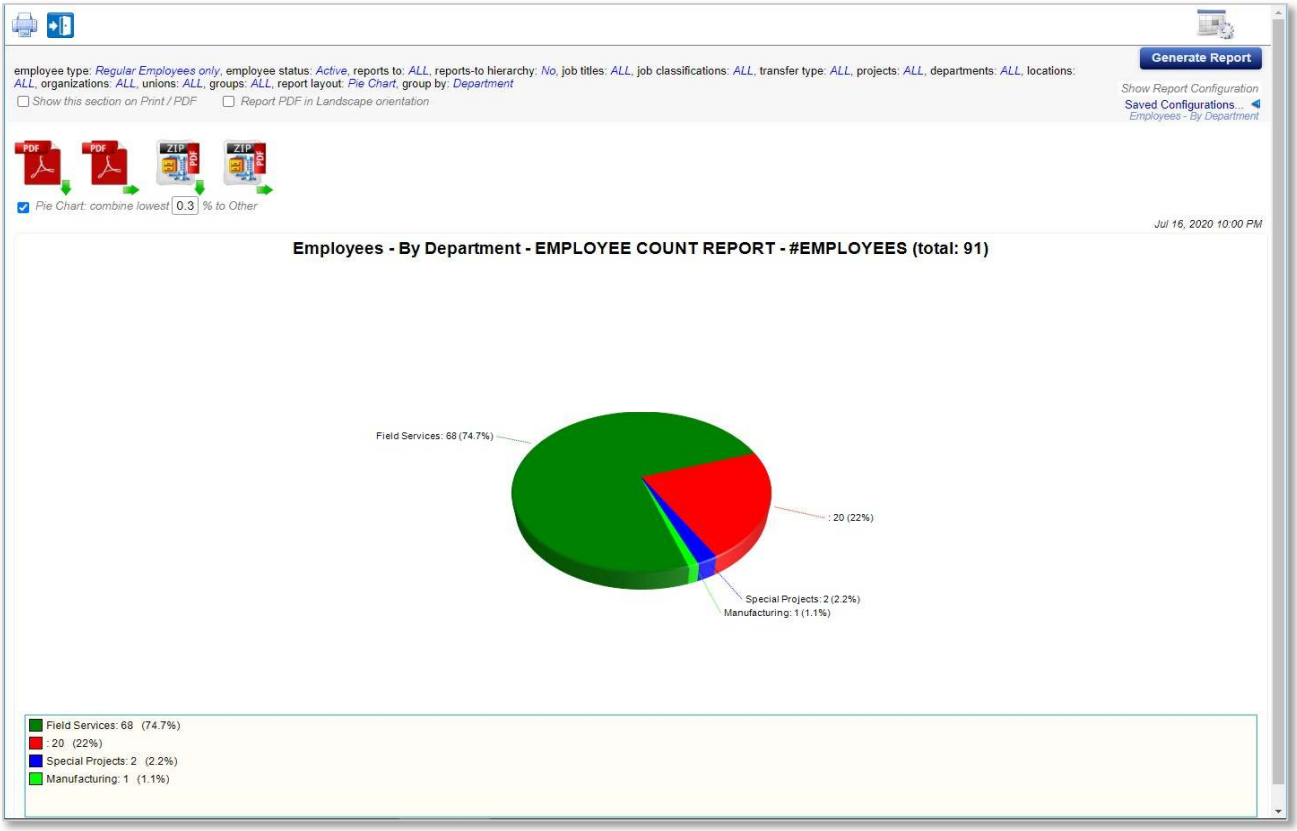
Saved Configurations...

☐ Show this section on Print / PDF ☐ Report PDF in Landscape orientation

Jul 16, 2020 10:07 PM

TRAINING STATUS REPORT

	EMPLOYEE	SKILL / COURSE	STATUS	EXPIRY DATE
1	ALL, I.C.	3 month probationary review	Expired	Jun 05, 2014
2	BOSS, Dabig	3 month probationary review	Expired	Jun 05, 2014
3	COMMAND, Secondin	3 month probationary review	Expired	Jun 05, 2014
4	GIBSON, William	3 month probationary review	Expired	Feb 01, 2020
5	HEFFERNAN, Tim	3 month probationary review	Expired	Sep 23, 2014
6	HOLLEY, James	3 month probationary review	Expired	Sep 23, 2014
7	ALL, I.C.	4 month performance review	Expired	Jul 05, 2014
8	BOSS, Dabig	4 month performance review	Expired	Jul 05, 2014
9	COMMAND, Secondin	4 month performance review	Expired	Jul 05, 2014
10	HEFFERNAN, Tim	4 month performance review	Expired	Oct 23, 2014
11	HOLLEY, James	4 month performance review	Expired	Oct 23, 2014
12	AUDITOR, External	Annual Performance Review	Expired	Sep 09, 2014
13	BENJAMIN, Blaine	Annual Performance Review	Expired	Mar 21, 2014
14	CARTER, Pat	Annual Performance Review	Expired	Jul 14, 2012
15	COUSINS, Barry	Annual Performance Review	Expired	Nov 28, 2014
16	DURBACA, Ion	Annual Performance Review	Expired	May 30, 2014
17	EMPLOYEE, Temporary	Annual Performance Review	Expired	Sep 06, 2014
18	FIGLEY, Curtis	Annual Performance Review	Expired	Jan 10, 2012
19	FITZGIBBON, Steve	Annual Performance Review	Expired	Feb 13, 2014
20	GERVAIS, Shawn	Annual Performance Review	Expired	Apr 01, 2010
21	GIBSON, Elyse	Annual Performance Review	Expired	Sep 20, 2012
22	GIBSON, James	Annual Performance Review	Expired	Jul 22, 2012
23	HEARN, Andrew	Annual Performance Review	Expired	Apr 26, 2014
24	JONES, Adeana	Annual Performance Review	Expired	Jan 05, 2013
25	JONES, George	Annual Performance Review	Expired	Feb 22, 2014
26	JONES, Mathew	Annual Performance Review	Expired	Jan 18, 2009
27	KOPEN, Sean	Annual Performance Review	Expired	Feb 07, 2013
28	LINGAT, Bruce	Annual Performance Review	Expired	Feb 13, 2014
29	LIST, Distribution	Annual Performance Review	Expired	Jun 13, 2014
30	MCLELLAN, Christine	Annual Performance Review	Expired	Mar 19, 2013
31	MOORE, Marissa	Annual Performance Review	Expired	Jul 14, 2012
32	REID, Neil	Annual Performance Review	Expired	Feb 15, 2013



employee type: *Regular Employees only*, employee status: *Active*, reports to: *ALL*, reports-to hierarchy: *No*, job titles: *ALL*, job classifications: *ALL*, transfer type: *ALL*, projects: *ALL*, departments: *ALL*, locations: *ALL*, organizations: *ALL*, unions: *ALL*, groups: *ALL*, report layout: *Pie Chart*, group by: *Department*

Generate Report

Show Report Configuration

Saved Configurations...

Employees - By Department

☐ Show this section on Print / PDF ☐ Report PDF in Landscape orientation

☑ Pie Chart: combine lowest 0.3 % to Other

Jul 16, 2020 10:00 PM

Employees - By Department - EMPLOYEE COUNT REPORT - #EMPLOYEES (total: 91)