



Training Guide

SAFETY REPORTING



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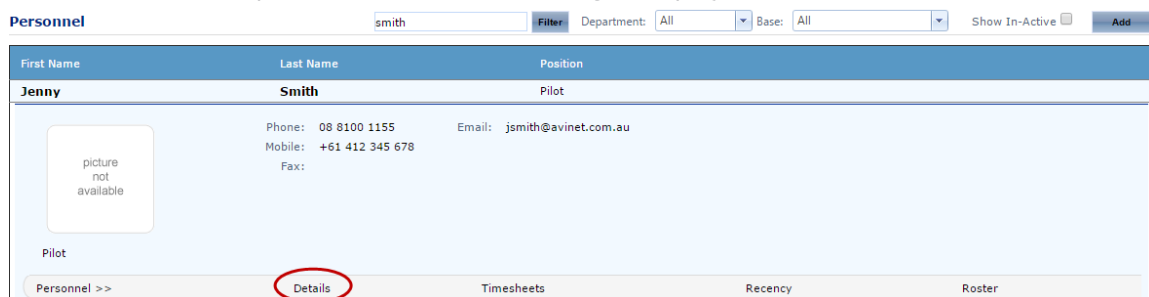
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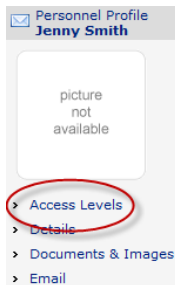
Assigning Access Levels

Before users can attempt to manage and customise safety reports, they must be assigned the correct access levels. Follow the steps below to assign the access levels:

- Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.
- Step 2. Filter the **Personnel** screen according to your requirements.
- Enter filter criteria in the text-box and click [Filter].
 - Select a value from the **Department** drop-down list to view personnel located in a particular department.
 - Select a value from the **Base** drop-down list to view personnel located in a particular base location.
 - Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.
- Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.



- Step 4. Select 'Access Levels' from the **Personnel Profile** pane.



- Step 5. Click [Edit].
- Step 6. Select all the applicable access levels in the **'Safety Reporting'** group.

Access Level	Description
Safety Reports > View Self	Allows users to view the safety reports where they are the reporter.
Safety Reports > View Selection	Allows users to view a selection of safety reports (for a base and department). Access to view specific reports must be provided for each report type in the Safety > Setup > Safety Options menu. By default users are unable to view any reports, until the specific report types are selected. For instance, if a user has the View Selection access for base 'Adelaide' they will only be able to

	view the 'Adelaide' reports once you assign them access to each report type (Ground, Flight, Quality etc).
Safety Reports > View All	Allows users to view all selected safety report types. Access to view specific reports must be provided for each report type in the Safety > Setup > Safety Options menu. By default users are unable to view any reports, until the specific report types are selected. For instance, if a user has the View All access they will only be able to view the safety reports once you assign them access to each report type (Ground, Flight, Quality etc).
Safety Reports > Modify Self	Allows users to submit safety reports. Access to submit specific reports must be provided for each report type in the Safety > Setup > Safety Options menu. By default users are unable to submit any reports, until the specific report types are selected.
Confidential Information > View Selection	Allows users to view the name and contact details of the reporter in selected safety reports (limited by base and department), regardless of whether the reporter selected the 'Confidential' option.
Confidential Information > View All	Allows users to view the name and contact details of the reporter in all safety reports, regardless of whether the reporter selected the 'Confidential' option.
Submit Reports On Behalf Of > Modify All	Allows users to submit safety reports on behalf of other users. This option includes a 'Submit on Behalf of' drop-down list in all safety reports for all users with this access level.
Safety Administration > Modify All	Allows users to change the setup of the Safety module, including the risk matrix and all the settings for each safety report type.

Step 7. Click [OK].

Setting up Safety Report Options

Before you commence using the safety reporting function in Air Maestro, you must first setup various reporting options.

Setup Global Safety Options

Step 1. Select **Safety > Setup > Safety Options**. The **Global Settings** tab is displayed.

Step 2. Complete the required options.

Field	Description
Chief Safety Officer	Select the Chief Safety Officer in your organisation.
Reporter can submit to Authorities	Select whether the reporter can lodge reports to external authorities when they submit the safety report. To setup authorities relevant to your organisation, select the Report Authorities tab and click [+Add Authority]. Complete the fields and click [✓].
Reporter can view Forums and Actions	Select whether the reporter can view the investigation forums and assigned actions for the safety report. If this option is unselected, the report champion / investigator can invite the user to participate in investigations on a report by report basis.
Hide Reporter and Champion Contact Details	Select whether the reporter and champion contact details are hidden when safety reports are submitted, viewed, printed, and sent to authority.
Allow Company to view Status / Outcomes	Select whether all personnel can have access to view the Status / Outcomes report for all safety reports. This report can be viewed by selecting Safety > Statistics > Status/Outcomes .
Send New Forum Post Notification Emails	Select whether the reporter and all investigation personnel should receive an email whenever a new entry is made in the investigation forums.
Allow individual to override New Forum Post Notification Emails	Select whether users posting comments in the forum have the option to suppress notification emails from being sent to other investigation personnel.
Champion Sends First Alerts	Select whether the champion must first review submitted reports before notifying all notification personnel about the safety event.

	This option allows the champion to amend the report details and adjust the risk rating for the safety report if required.
Champion / Investigator Title	Enter the title of the champion / investigator in your organisation. For example, Safety Manager, Incident Manager etc. Wherever reference is made to the 'Champion / Investigator' this term is replaced with the entry you make in this field.

Step 3. Click [OK] to save the changes to the **Global Settings** tab.

Setup Safety Report Types

Air Maestro contains customisable safety report types that administrators can setup to meet organisational requirements. The default safety report types included in Air Maestro are: Clinical, Defect, Flight, Ground, and Quality. Once you setup a new report type, you must setup the options for the report and the custom tabs/fields which must be included in the report.

Step 1. Select **Safety > Setup > Safety Options**.

Step 2. Select the **Report Types** tab. All the current report types are listed in the grid.

Global Settings	Report Types	Report Authorities	Report Categories	Clinical Occurrence	Defect Occurrence
Fatigue Report	Flight Occurrence	Ground Occurrence	Quality Occurrence		
+ Add New					Refresh
Report Type	Short Name	Prefix	Description	Officer/Role Name	Active
Clinical Occurrence	Clinical	C	Clinical Occurrence	Clinical Safety Officer	<input checked="" type="checkbox"/>
Defect Occurrence	Defect	E	Defect Occurrence	Defect Safety Officer	<input checked="" type="checkbox"/>
Fatigue Report	Fatigue	B	Fatigue Report	Fatigue Report Manager	<input checked="" type="checkbox"/>
Flight Occurrence	Flight	F	Flight Occurrence	Flight Safety Officer	<input checked="" type="checkbox"/>
Ground Occurrence	Ground	G	Ground Occurrence	Ground Safety Officer	<input checked="" type="checkbox"/>
Quality Occurrence	Quality	Q	Quality Occurrence	Quality Safety Officer	<input checked="" type="checkbox"/>

Step 3. Click [+Add New].

Step 4. Complete the safety report details as required.

Field	Description
Report Type	Enter the name for the safety report type. E.g. 'Environmental Report'.
Short Name	Enter the short name for the safety report type. E.g. 'Environmental'.
Prefix	Enter the prefix for the safety report type. E.g. 'N'.
Description	Enter the description for the safety report type. E.g. 'An environmental report regarding the safety of local flora and fauna'.
Officer/Role Name	Enter the officer/role name for the safety report type. E.g. 'Environment Officer'.
Active	Select whether the safety report type is active. If this tick box is unselected, the safety report type will be inactive and unusable.

Step 5. Click [✓]. The grid is updated with the new safety report type.



If any of the default report types do not apply to your organisation, you can disable them by clicking [✎] and unselecting the **Active** tick box, followed by clicking [✓].

Setup Safety Report Authorities

Air Maestro allows authorised personnel to send a copy of selected safety reports to authorities via email. Sample authorities include: CASA/CAA/FAA, ATSB, external auditors, customers etc. When a safety report is submitted, the reporter (if enabled in the **Global Settings** tab) or the safety champion / investigator have the option to notify the authority of the safety event. Report authorities can differ for each report type.

Step 1. Select **Safety > Setup > Safety Options**. The **Global Settings** tab is displayed.

Step 2. Select the **Report Authorities** tab.

Authority	Email Address	Description	Report Types	Active
ATSB	atsbasir@atsb.gov.au	Flight Occurrences	Flight Occurrence	<input checked="" type="checkbox"/>

Step 3. Click [+Add Authority].

Step 4. Complete the relevant fields for the authority.

Field	Description
Authority	Enter the authority name.
Email Address	Enter the email address for the authority. The system will email all reports to this email address when requested.
Description	Enter a description of the authority. For example, CASA Flight Inspector, Auditor, Customer.
Report Types	Select which report types relate to this authority. For example, if you select 'Flight' and 'Defect' you will only be able to submit reports to this authority which are flight or defect reports.
Active	Select whether this authority is active and should be selectable during the authority submission.

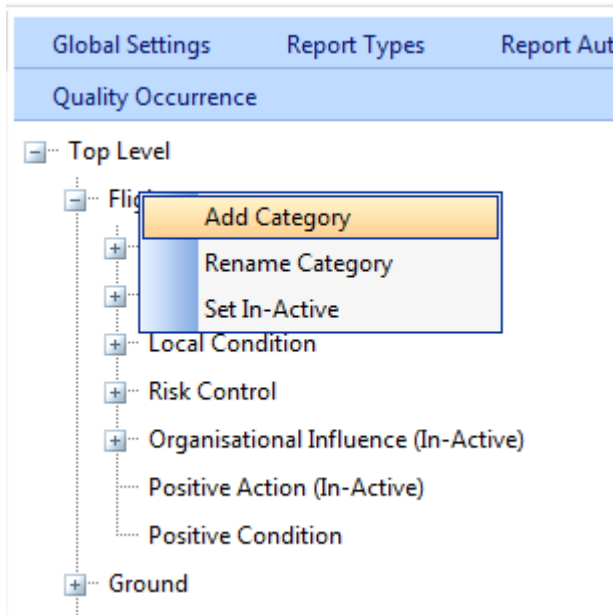
Step 5. Click [✓].

Step 6. Repeat **Steps 3-5** to add additional report authorities.

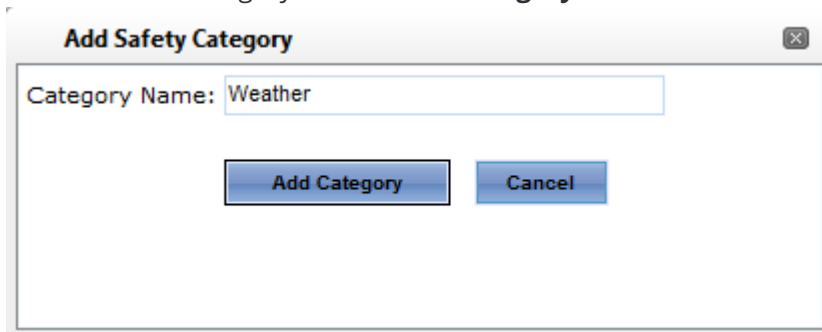
Setup Safety Report Categories

Air Maestro allows the reporter to categorise the safety event when submitting a safety report. This option is only available to the reporter, if you have enabled the **Category** field for the safety report. The categories are customisable for each organisation.

- Step 1. Select **Safety > Setup > Safety Options**. The **Global Settings** tab is displayed.
- Step 2. Select the **Report Categories** tab.
- Step 3. Expand the category corresponding with the required report type.
- Step 4. Right-click on the category name and select 'Add Category'. The **Add Safety Category** dialog box is displayed.



- Step 5. Enter the new category name in the **Category Name** text box.



- Step 6. Click [Add Category]. The new category is added to the tree.
- Step 7. Repeat **Steps 3-7** to add additional categories for each safety report type.



To rename an existing category, right-click the category and select 'Rename Category'. Edit the category name and click [Update].

Setting up Safety Report Custom Fields

Air Maestro allows you to create custom safety reports to capture the safety events relevant to your organisation. Before you can commence setting up custom tabs and fields for each safety report type, you must ensure the report type (Fatigue, Environment, Flight etc) is created. Refer to **Error! Reference source not found.** in this guide for instructions on creating a new report type.

Setup Safety Report Tabs

Air Maestro allows you to create custom tabs to capture the required information for each safety report type. Tabs can be unique to each safety report type (e.g. Mechanical Fault tab) or common to all reports (e.g. Report Details tab).

Step 1. Select **Safety > Setup > Safety Custom Fields**. The **Safety Form Setup** screen is displayed and all the current tabs are listed in the grid.

Safety Form Setup Hide Tab Register

List Disabled Tabs + Add Tab

Tab Name	Display Name	Champion Only	Mandatory	Send To Authority	Enabled		
Actual or Potential Damage	Actual or Potential Damage	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼	
C_Complaint	Complaint	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
C_Documents and Images	Documents and Images	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
C_Equipment	Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
C_Errors	Errors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
C_EventLogistics	EventLogistics	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
C_Patient Details	Patient Details	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
E_Aircraft Defect	Aircraft Defect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
E_Equipment Defect	Equipment Defect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	
E_Part Information	Part Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼ ▲	

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Step 2. Click [+Add Tab]. A new row is displayed in the grid.

List Disabled Tabs + Add Tab

Tab Name	Display Name	Champion Only	Mandatory	Send To Authority	Enabled		
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Step 3. Complete the tab details as required.



*The **Champion Only**, **Mandatory**, **Send To Authority** and **Enabled** tick boxes are the default values for the tab and can be altered for each safety report type to suit individual reports.*

Field	Description
Tab Name	Enter a unique identifier for the tab. For example, if you are creating a tab which is used only for an 'Environmental' safety report type and relates to weather conditions, you may name the tab in the format: reportid_weatherconditions. If the report id for an 'Environmental' safety report is 'V', the tab name could be v_weatherconditions.
Display Name	Enter the name that is displayed for the tab. For example, Weather Conditions.

Champion Only	Select whether the tab can only be completed by the champion/investigator. If this tick box is unselected, the reporter can complete the tab.
Mandatory	Select whether the tab is mandatory when completing the safety report. If this tick box is unselected, the reporter can skip the tab.
Send To Authority	Select whether the tab is sent to the authorities, when given the option. If this tick box is unselected, the information on this tab is not sent to the authorities.

- Step 4. Click [✓]. The grid is updated with the new tab.
Step 5. Select the newly created tab in the **Select Tab** drop-down list.
Step 6. [Add New Field].



You must create a group prior to setting up new fields for the tab. By setting up a group, you can select the layout options for the fields within that group.



- Step 7. Select **'Group'** from the **Control Type** drop-down list.
Step 8. Enter the group name in the **Control Name** text box. This name is used to store the custom group field in the database. Special characters such as (?,/ etc) are not allowed in this field.
Step 9. Enter the group label in the **Control Label** text box. This label is displayed to the reporter.
Step 10. Select the **Border** tick box to include a border around the group field.
Step 11. Select the **Display Label** tick box to include the label entered in the **Control Label** text box for the group field.


	Field Name	Field Type
Control Type:	Group	
Control Name:	Weather Conditions Dep	<input type="checkbox"/> Border
Control Label:	Weather Conditions on Departure	<input checked="" type="checkbox"/> Display Label

- Step 12. Complete the **Options** pane for the group as required.

Field	Description
Display Mode	Select the display mode for the group field. The 'Flow' display mode attempts to fit all the custom fields as close together and as neatly as possible. The 'Table' display mode displays each custom field one after another depending on the direction.
Direction	Select the direction in which the custom fields are displayed.
Number of Columns	Select the number of columns that are contained within this group.
Label Width	Enter the width of each field label within this group.
Alignment	Select the required alignment of fields within this group.
Display Options	Select the display option for the group field.

Step 13. Click [Insert]. The grid is updated with the new group.

Add New Field	
Field Name	Field Type
grpGeneralInformation	Group  

Step 14. Click [] or use the **Hierarchy** drop-down list to view/expand the custom field group.

Step 15. Click [Add New Field] to add a custom field to the group.

Step 16. Select the required field type from the **Control Type** drop-down list.

Field	Description
Aircraft	Displays a drop-down list of every aircraft within the system.
Autonumber	Displays an automatically generated number starting from a base number and prefix.
Calculated Field	Displays a calculated value based on a formula involving other custom fields. For example, you may create an 'Age' calculated field, which outputs a numeric value based on an entry in a 'Date of Birth' custom field.
Checkbox	Displays a tick box that enables the user to select from true/false or yes/no options.
Checkbox List	Displays multiple tick boxes that enable the user to select one or more items.
Contact Picker	Displays a selectable list of contacts as entered in the contact register (Operations > People > Contacts).
Cumulative Time	Displays a text box which enables the user to enter an amount of time.
Date Control	Displays a picker that enables the user to select a date.
Date Time	Displays a picker that enables the user to select a date and time.
Drop-Down List	Displays a predefined list that enables the user to select a single item from the list.
Group	Groups multiple custom fields under a single heading.
Label	Displays a line of text.
Nested Drop Down List	Displays a series of interconnected drop down lists (up to 3). Typically used for location data (Country, State, Suburb).
Numeric	Displays a text box which enables the user to enter numerical data.
Personnel	Displays a drop-down list of all personnel within the system and when a user is selected, further information is displayed about the selected user (Contact Details, Company Details, Pilot Details or Crewmen Details).
Personnel Picker	Displays a list of personnel names currently active in Air Maestro by Department, Base/Department, Base or Name.
Radio Button List	Displays multiple radio buttons that enable the user to select a mutually exclusive option.
Text	Displays a text box which enables the user to enter text data.
Time	Displays a text box which enables the user to enter time data.

Tree	Displays a hierarchal tree structure.
Upload	Displays the upload control allowing users to upload files.

Step 17. Complete the field options with the required settings.

Field	Description
Control Name	Enter the unique identifier for the custom field in the Control Name text box. This name is used to store the custom field in the database. Special characters such as (?,/ etc) are not allowed in this field.
Control Label	Enter the display name for the custom field in the Control Label text box. For example, you may enter a more descriptive name than that entered in the Control Name field as this field is displayed in the interface.
Border	Select the Border tick box to include a border around the field.
Display Label	Select the Display Label tick box to include the label entered in the Control Label text box for the field.

Step 18. Complete the **Options** pane for the custom field as required. The options vary according to the selected custom field. For example, for the 'Drop Down List' control type, you must specify if the field is required, the list items and if the field is always displayed. For the 'Text' control type, you must specify if the field is required, if a multi-line text box is required, the dimensions of the multi-line text box (if applicable) and if the field is always displayed.



The **Display Options** field allows you to specify when the field must be displayed. The default is 'Always', but if you click the 'Always' text a dialog box is displayed which allows you to set the view rules for the field. For example, if you had a field for 'Delays' you may wish to display a 'Description' text box only when the 'Delays' field is selected.

Step 19. Click [Insert]. The grid is updated with the new custom field.

Field Name		Field Type		Add New Field	
grpGeneralInformation		Group			



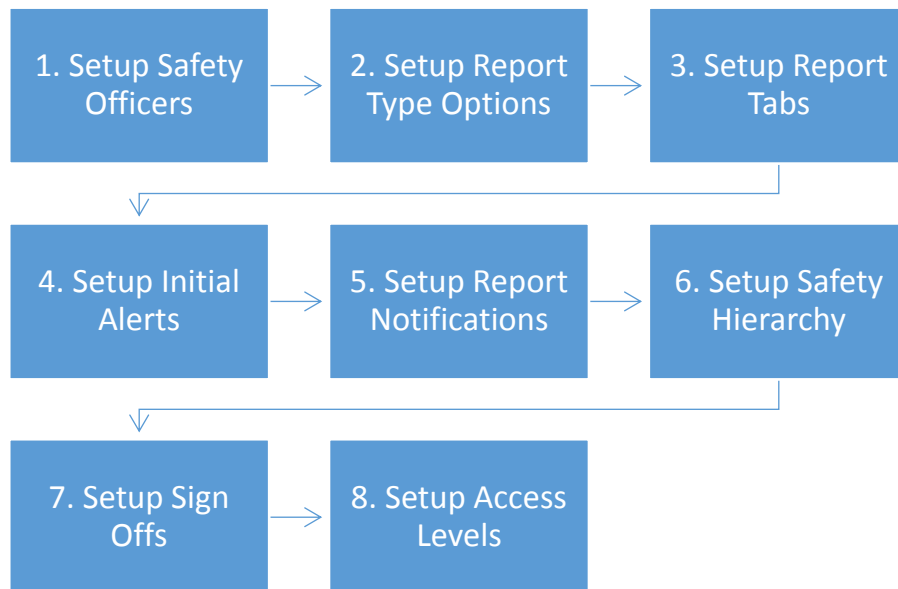
A preview of the custom field is available in the **Preview** pane. To modify the field, click [], edit the required options and click [Update].

Step 20. Click [] or use the **Hierarchy** drop-down list to view/expand the custom field group. To add additional custom fields within the group field, repeat **Steps 15-19**.

Step 21. Select **root** from the **Hierarchy** drop-down list to view/retract the custom field group and to add additional custom fields outside of group field.

Setting up Safety Report Types

Air Maestro requires you to setup specific options for each safety report. The process for finalising the safety report requires eight steps:



Step 1 - Setup Safety Officers

When you have assigned personnel to a safety officer role you will have the option to assign them specific responsibilities for the safety report type (sign-off, champion/investigator etc.). Assigning a safety officer role rather than an individual to specific tasks, allows you to quickly change the individual assigned once, without needing to update all the relevant safety settings.

- Step 1. Select **Safety > Setup > Safety Options**.
- Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).
- Step 3. Scroll to the **Safety Officers** pane.
- Step 4. Select the required safety officer for this safety report type from the **Safety Officer** drop-down list.
- Step 5. Click [Set Role].

Step 2 - Setup Report Type Options

Air Maestro allows you to customise the initial **Report Info** tab for each safety report type. The **Report Details** tab is displayed immediately to the reporter when they submit a new report.

- Step 1. Select **Safety > Setup > Safety Options**.
- Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).

Step 3. Scroll to the **Report Type Options** pane.

Report Type Options

Display Risk Selector to Reporter?

Initial Likelihood: Rare

Initial Consequence: Insignificant

Risk Level: Low

Report Prefix: F

Optional Fields:

Category: Required Optional Hidden

Event Description: Required Optional Hidden

Event Location: Required Optional Hidden

Event Type: Required Optional Hidden

Reporter Role: Required Optional Hidden

Save

Step 4. Select the **Display Risk Selector to Reporter** tick box if the risk selector must be displayed to the reporter for this report type.

Step 5. Select the required initial likelihood for the report from the **Initial Likelihood** drop-down list.

Step 6. Select the required initial consequence for the report from the **Initial Consequence** drop-down list.



*The **Risk Level** field is automatically calculated from the selected **Initial Likelihood** and **Initial Consequence** using the **Risk Matrix**.*

Step 7. Enter the prefix for the safety report type if required. The default prefix assigned when setting up the report type is automatically displayed in the textbox.

Step 8. Select whether the optional fields: **Category**, **Event Description**, **Event Location**, **Event Type** and **Reporter Role** for the safety report type are: required, optional or hidden.

Report Type Options

Display Risk Selector to Reporter?

Initial Likelihood: Rare

Initial Consequence: No Injury

Risk Level: Low

Report Prefix: N

Optional Fields:

Category: Required Optional Hidden

Event Description: Required Optional Hidden

Event Location: Required Optional Hidden

Event Type: Required Optional Hidden

Reporter Role: Required Optional Hidden

Save

Step 9. Click [Save].

Step 3 - Setup Report Tabs

Air Maestro allows you to create custom tabs to capture the required information for each safety event. For example, for an OH&S report you may wish to divide your report into the following tabs:

- Report Details
- Injury Details
- Hazard Details.

To setup new report tabs refer to **Setup Report Tabs** in this guide. Once the tabs are created, you can include them in the relevant safety report type.

- Step 1. Select **Safety > Setup > Safety Options**.
- Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).
- Step 3. Scroll to the **Report Tabs** pane.
- Step 4. Click [+Add Tab].

Report Tabs - which tabs appear in the report?

Tab	Champion Only	Mandatory	Send To Authority	
Tab Name:	-Select-			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="button" value="Add"/>	<input type="button" value="Cancel"/>		
F_Flight Details	No	Yes	Yes	
F_Injury / Damage	No	No	Yes	
F_Environmental	No	No	Yes	
F_Mechanical	No	No	Yes	
F_Near Collision	No	No	Yes	
F_Animal Bird Strike	No	No	Yes	
Actual or Potential Damage	No	No	Yes	

- Step 5. Select a tab from the **Tab Name** drop-down list. The default options (Champion Only, Mandatory etc.) for that tab are displayed.
- Step 6. Complete the required options for the selected tab.

Field	Description
Champion Only	Select whether the tab can only be completed by the champion/lead investigator. If this tick box is unselected, the reporter can complete the tab. For each 'Champion Only' tab, you can nominate whether Investigation Personnel, the Reporter and Personnel with View Access can view the tab. For instance, if you do not wish for the reporter to view the contents of the 'Champion Only' tab ensure they are not selected in the 'Additional Champion Only Tab View Access' pane.
Mandatory	Select whether the tab is mandatory when completing the safety report. If this tick box is unselected, the reporter can skip the tab.

Send To Authority	Select whether the tab is sent to the authorities, when given the option.
Enabled	Select whether the tab is enabled for this safety report type. If this tick box is unselected, the tab is not displayed when completing the safety report.

Step 7. Click [Add].

Step 8. Repeat **Steps 4-7** to add additional tabs to the safety report.

Step 4 - Setup Initial Alerts

Air Maestro allows you to notify all required personnel when a safety report is submitted. The notification is sent via an alert within Air Maestro, an email or SMS. For each safety report type, you can specify which personnel require immediate notification of the report and these recipients can differ for each safety report.

This option is only available if the **Champion Sends First Alerts** tick box is selected in the **Global Settings** tab. If this option is selected all new reports are automatically sent to the champion/investigator for review. When the champion/investigator concludes their review of the report, they send out notifications to all personnel in the **Initial Alert** pane. If the **Champion Sends First Alerts** tick box is unselected in the **Global Settings** tab, a notification about the safety report is automatically sent to all users in the **Report Notification** pane, bypassing the champion/investigator initial review.

Step 1. Select **Safety > Setup > Safety Options**.

Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).

Step 3. Scroll to the **Initial Alert** pane.

Initial Alert - which personnel require immediate notification of a new safety report submission?

Risk	AM Alert	Email	SMS
Low			
Moderate			
High			
Extremely High			

Step 4. Click [✎] to select the required personnel for each report risk level.

Step 5. Select the required personnel from the **AM Alerts**, **Emails** and **SMS** drop-down lists.

Initial Alert - which personnel require immediate notification of a new safety report submission?

Risk	AM Alert	Email	SMS
Low	Brian, A (Engineer) Miller, J (Pilot)	Miller, J (Pilot)	

AM Alerts:

Emails:

SMS:

Step 6. Click [Update].

Step 7. Repeat **Step 4-7** for each report risk rating.

Step 5 - Setup Report Notifications

Air Maestro allows you to notify and provide visibility to all required personnel when a safety report has transitioned into the investigation phase. The notification is sent via an alert within Air Maestro, an email or SMS. For each safety report type, you can specify which personnel require immediate notification of the report and these recipients can differ for each safety report.

- Step 1. Select **Safety > Setup > Safety Options**.
- Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).
- Step 3. Scroll to the **Report Notification** pane.
- Step 4. Click [✎] to select the required personnel for each report risk level.
- Step 5. Select the required personnel from the **AM Alerts, Emails** and **SMS** drop-down lists.

Report Notification - which personnel require notification and visibility over safety report investigations?

Risk	AM Alert	Email	SMS
Low			

AM Alerts: Environment Manager, Adelaide, Joe

Emails: Please Select

SMS: Please Select

Update Cancel

- Step 6. Click [Update].
- Step 7. Repeat **Step 4-7** for each report risk rating.

Step 6 - Setup Report Champion / Investigator






Air Maestro allows you to assign an individual to champion / investigate each safety report, based on the report type and risk rating. This individual is responsible for ensuring the report is investigated, actioned and eventually closed. The champion / investigator must be one of the safety officer roles.

- Step 1. Select **Safety > Setup > Safety Options**.
- Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).
- Step 3. Scroll to the **Safety Hierarchy** pane.
- Step 4. Click [✎] to select the required safety officer role as the Champion/Lead Investigator for each report risk level.



To assign personnel to a base safety officer role select **Operations > Locations > Bases** and click [🔍] for the required base. Click [Edit] and select the preferred safety officer from the corresponding drop-down list. For example, Safety > Flight Safety Manager.


- Step 5. Select the required safety officer role from the **Champion** drop-down list.
Safety Hierarchy - which Safety Officer role is the Lead Investigator ?

Risk	Lead Investigator
Negligible	
Low	
Medium	
High	
Champion: <input type="text" value="Environmental Officer"/>	
* The Champion controls the report's progress and assigns Personnel to participate in the Investigation Forum.	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	
Extreme	


- Step 6. Click [Update].
 Step 7. Repeat **Step 4-7** for each report risk rating.

Step 7 - Setup Sign Offs

Air Maestro allows you to automatically assign sign off personnel for each safety report, based on the report type and risk rating. Sign off personnel are responsible for reviewing the report and approving the actions taken, before the report is closed. In addition to automatic sign offs, personnel can also be assigned to sign off an individual report at the safety investigator's discretion.

- Step 1. Select Safety > Setup > Safety Options.
 Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).
 Step 3. Scroll to the **Sign Off** pane.
 Step 4. Click [] to select the required personnel for each report risk level.
 Step 5. Select the required sign off personnel from the **Sign Off** drop-down list.

Sign Off - which personnel need to approve the safety report investigation before closure?

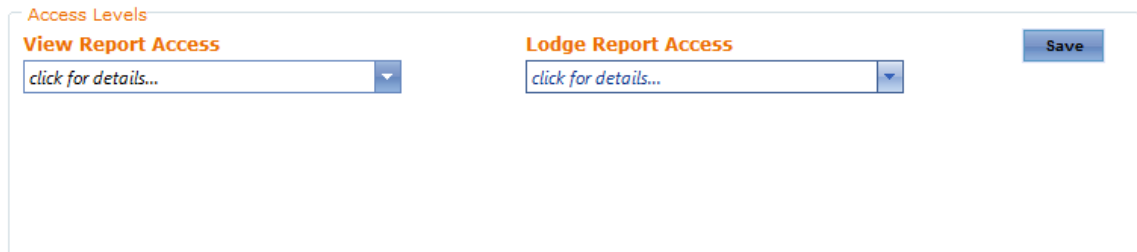
Risk	Sign-Off Required
Low	
Sign Off: <input type="text" value="Environment Manager; Brian, Aleks"/>	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

- Step 6. Click [Update].
 Step 7. Repeat **Step 4-7** for each report risk rating.

Step 8 - Setup Access Levels

Air Maestro allows you to specify which users have the option to view and lodge specific safety reports. Access to view and lodge safety reports can be controlled on a base location and department level. For example, you can setup all users in the 'Pilot' department across all bases to view and lodge 'Flight' reports. In addition, you can setup all users in each base and department to view and lodge 'Quality' reports. If you have a report which is specific to a base, you can assign just the users in that base to view and lodge the report.

- Step 1. Select **Safety > Setup > Safety Options**.
- Step 2. Select the tab corresponding with the safety report type (E.g. Flight Report).
- Step 3. Scroll to the **Access Levels** pane.
- Step 4. Select which personnel can view this safety report type from the **View Report Access** drop-down list.
- Step 5. Select which personnel can lodge this safety report type from the **Lodge Report Access** drop-down list.



The screenshot shows a configuration window titled "Access Levels". It contains two dropdown menus. The first is labeled "View Report Access" and the second is labeled "Lodge Report Access". Both dropdowns currently show "click for details...". A "Save" button is located in the top right corner of the window.

- Step 6. Click [Save].



*In addition to assigning view and lodge access levels for each safety report type, you must also ensure the user has the correct permissions assigned in their access levels. The **Safety Reporting > Safety Reports > Modify Self** access level must be assigned to all users who are required to lodge safety reports. Air Maestro will then verify which particular report types the user has access to from the safety report setup for each report type.*