VectorSolutions™

EHS Management Software Buyer's Guide

ENVIRONMENTAL, HEALTH, AND SAFETY (EHS) MANAGEMENT SOFTWARE

IndustrySafe Safety Software, a Vector Solutions brand, is a web-based safety data management solution developed so that organizations can track record, track, and analyze:

- Incidents
- OSHA recordkeeping
- Claims
- Hazards
- Corrective Actions
- Training
- Inspections
- Behavioral Based Safety
- Job Safety Analysis
- And more ...

LEARN MORE

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PART I

INTRODUCTION

INTRODUCTION

Whether this is your first time shopping for online environmental health and safety (EHS) software or you're upgrading from a legacy solution, this buyer's guide is designed for you to use in your search for the safety management solution that works best for you and your company.

We've broken the guide down into the following sections:

- What is EHS management software?
- Building your internal evaluation team
- Defining your online EHS management needs
- Evaluating online EHS management software providers

We've tried to be as complete as possible, but no doubt we've missed some things that will be important to your company. Likewise, we also may have included some things that aren't important to you or aren't relevant at your company. That's OK—cross 'em off and move on. This isn't intended to be a definitive list or RFI, but a guide to help structure thought processes and questioning. We hope it helps.

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PART II

WHAT IS EHS MANAGEMENT SOFTWARE?

WHAT IS EHS MANAGEMENT SOFTWARE?

EHS software acts as a data management system for capturing, storing, and analyzing information related to occupational health and safety. EHS solutions are primarily used by businesses to maintain regulatory compliance by monitoring safety performance metrics, recording and tracking workplace incidents, and performing inspections and other safety activities. Safety professionals and compliance officers also use EHS software to guide risk management analysis and implement corrective actions.

Common Components

A comprehensive EHS management solution should be able to address each of the following areas:

Incident Lifecycle

- Incidents & OSHA Recordkeeping
- Claims
- Hazards
- Corrective Actions

Proactive Prevention

- Inspections
- Behavior Based Safety (BBS) Observations
- Job Safety Analysis (JSA)

Chemical Management

- Safety Data Sheet (SDS) Management
- Industrial Hygiene

Training & Competency

- Learning management system (LMS)
- Training content

PART III

BENEFITS OF SAFETY SOFTWARE

BENEFITS OF SAFETY SOFTWARE

Safety Management Software can be a powerful tool for any business seeking to ensure company-wide employee safety as well as continued compliance with regulatory standards. An electronic, centralized system for the management of all safety-related information will carry significant benefits for any organization, including:

- Fewer safety-related incidents, resulting in fewer claims and fines
- Streamlined safety processes and the elimination of data duplication
- Achieve consistency in reporting
- Clear, current safety performance metrics
- Increased transparency into safety issues and the resolution of these items
- Risk mitigation through ongoing compliance
- Increased employee engagement with safety

Did You Know?

The National Safety Council estimates

that a disabling work injury costs an average of

$39,000.

PART IV

BUILDING YOUR INTERNAL EVALUATION TEAM

BUILDING YOUR INTERNAL EVALUATION TEAM

You'll get better results if you get some coworkers involved in your search for the best online safety management solution for your company. Here's a rough framework for when it's best to bring different teams into the buying process.

When to Involve Team Members in the Buying Cycle:

Role	Buying Stage
EHS Director	Selection Process Onwards
EHS Team	Selection Process Onwards
Information Technology (IT) Team	Decision Making
Procurement	Decision Making
Executive Board	Decision Making
Key Department Managers	Decision Making / Testing
End Users	Go Live

PART V

DEFINING YOUR EHS MANAGEMENT NEEDS

DEFINING YOUR EHS MANAGEMENT NEEDS

Once you've put together your team, the next step is to create a list of requirements for your safety management needs before you begin searching for and evaluating different solutions.

Ultimately, good requirements emerge from understanding your current and desired objectives. What do you hope to gain from your EHS software? From here, your company can rank and prioritize where the software will have the largest desired effect.

Different software providers have strengths in different areas, and often different modules/solutions. Keep in mind that many vendors will be able to meet your objectives but they may accomplish them through different processes.

PART VI

EVALUATING EHS SOFTWARE PROVIDERS

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Online EHS management software systems are generally very robust and offer many features, including some you possibly may never use. As a result, you'll want to find a system that best matches your company's needs. We've broken some common criteria for evaluating EHS software down into several smaller sections, which are listed below. Each item listed is covered in its own section on the following pages.

A. Software Models

B. User Friendliness

C. Configurability

D. Security and User Access Levels

E. Workforce Organization and Hierarchy

F. Reporting and Automation

G. Mobile Functionality

H. Future Growth and Scalability

I. Customer Support and Professional Services

J. Other Things to Consider as You Shop

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EVALUATING EHS SOFTWARE PROVIDERS

Software Models

Beginning in the 1980's up until the early 2000's, there was really only one way to purchase software. You would make a one-time purchase and install the software on a server or hard drive. If you wanted to update to a new version, you needed to make a second purchase in order to update or overwrite the existing program.

Then, the mid 2000's gave rise to a new model of software: software as a service (SaaS). With a SaaS platform, users pay a subscription fee and receive much more regular software updates automatically over the internet. Today, SaaS models are virtually ubiquitous and it's extremely likely that you've used that type of software, regardless of whether or not you were familiar with that "SaaS" term. For example, the Microsoft Office suite is a SaaS model.

In the EHS space, there are many SaaS safety management software providers to choose from. However, there are still some vendors that operate a hybrid SaaS model that lies somewhere between software and true SaaS. The table below outlines some of the key features of each type of software so you can decide what model works best for your needs.

Feature	Software	Hybrid SaaS	True SaaS
Downloaded to hard-drive or server	✓	✗	✗
Requires in-house IT hardware to maintain	✓	✓	✗
Updates available over the internet	✗	✓	✓
Quickly able to rollout important updates and security patches	✗	✗	✓
Access to world class hosting and SLAs	✗	✗	✓
Inexpensive to maintain	✗	✗	✓
Regular updates	✗	✗	✓

EVALUATING EHS SOFTWARE PROVIDERS

User Friendliness

There's probably nothing more important for a safety management system than for it to have an intuitive and simple user experience. This is true for employees and for those who will perform administrative roles when using the system.

When a software is straightforward for end users to use and navigate, efficiency and user adoption increases dramatically. During sales demonstrations of the product, or if you're given trial-access to a sandbox or demo site, consider the following points.

- Is the system intuitive?
- Is it easy to log into the system?
- Are buttons, fields, icons, etc., are all where you would look for them?
- Is the general user experience for employees who will record safety activities easy, efficient, and pleasant?
- Is the general user experience for admins who will manage and administer the system easy, efficient, and pleasant?

EVALUATING EHS SOFTWARE PROVIDERS

Configurability

Understandably, software purchasers want to buy a piece of software that does exactly what they want it to.

However, the more complex your requirements are, the less likely it is that a piece of software is going to come out of the box meeting those requirements. In order to meet your specific needs, the software must either be configured, or customized, or perhaps a combination of both.

These two common buzzwords — "configured" and "customized"—come up frequently within the software marketplace. The problem is that these terms are not always well defined so there can be a fair bit of confusion. To clear things up, we've broken down the differences between these two development approaches in the following paragraphs.

What does customization mean?

A customization is a modification or a feature of software that requires custom coding by a programmer. Customizations can range from fairly basic to very invasive changes to the core application.

To put it simply, customizations mean more effort and more risk. This is because a programmer is working outside the means in which an application was specifically developed. Custom code tends to break in future upgrades and is generally costly to maintain over time, so many vendors decline to offer custom solutions and instead choose to meet customers' requirements through configurations.

What does configuration mean?

A configuration is where you use native tools within the system to change its features or behavior. For example, you can configure your email inbox so that you can filter out emails from a specific contact into its own folder or tab.

Compared to customizations, configurations mean much less effort and less risk. This is because tools within the application are being used to make changes in a way that the software was designed to offer.

EVALUATING EHS SOFTWARE PROVIDERS

We advise looking for a solution that offers robust configuration tools so that you can make changes on your own in minutes. When examining options, consider the following questions:

- How easily can admin users make changes, and to what extent?
- Can fields be renamed, edited, added, dragged and dropped, etc.?
- Can you make changes to forms and checklists?
- How much control do you have over incident workflows?
- To what extent can you edit email templates and notification workflows?

Security & User Access Levels

Some EHS management systems allow you to utilize security roles so you can control the amount of administrative access people at your company will have within the system. Below are some things to consider regarding security roles and the ability to grant more or less administrative powers to workers at your company.

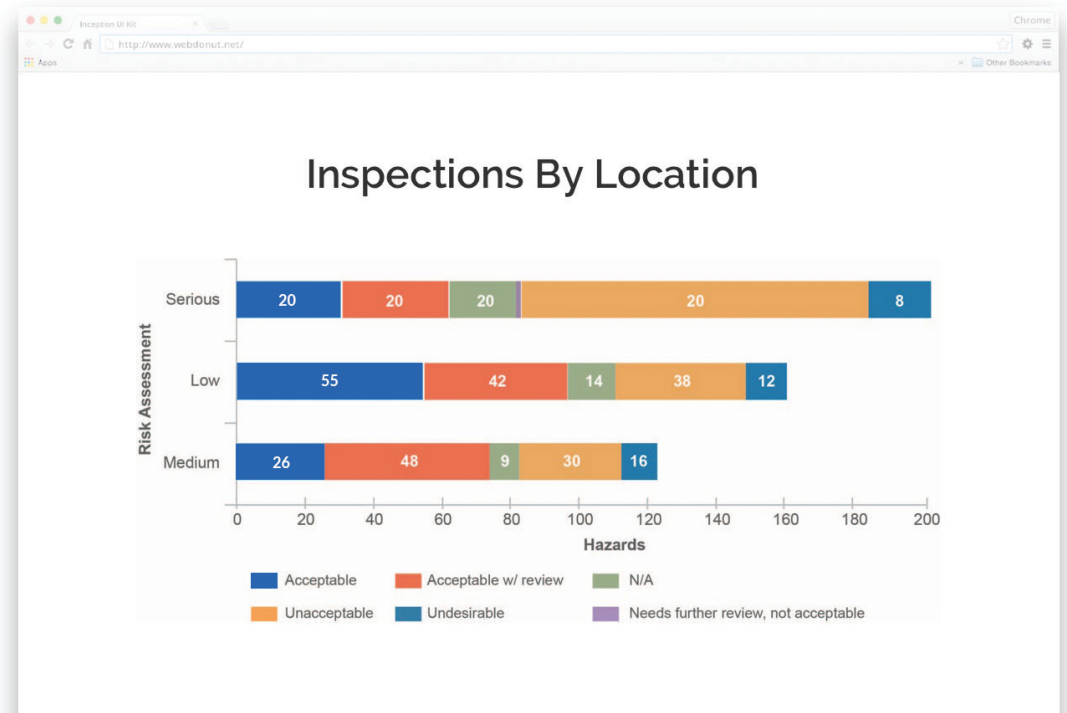
- Does the system come with out of the box and/or configurable security roles?
- Does the system allow security roles to be configured so that they include both:
  - (1) a set of powers or privileges—what the person in that role can or can't do
  - (2) the ability to focus those powers and privileges so the person in the role can exercise the powers throughout the entire company or only for a smaller part (such as a site, department, or team)?
- Are the security roles easy to assign and unassign?
- Does the system allow you to configure your own security roles, or can the provider configure them for you?
- Can roles be set up to protect sensitive information and ensure compliance with HIPAA regulations?

Workforce Organization and Hierarchy

Being able to organize the employees in your workforce to make reporting easier and more specific can be very helpful.

Does the system allow you to organize your workforce in order to run reports on specific employees based on job title, work area, department, site, and/or other logical and relevant units?

You'll also want to determine whether the platform can easily integrate with your existing software systems (HR, payroll, TPAs) that you are already using so that location and employee data can be consistently updated.



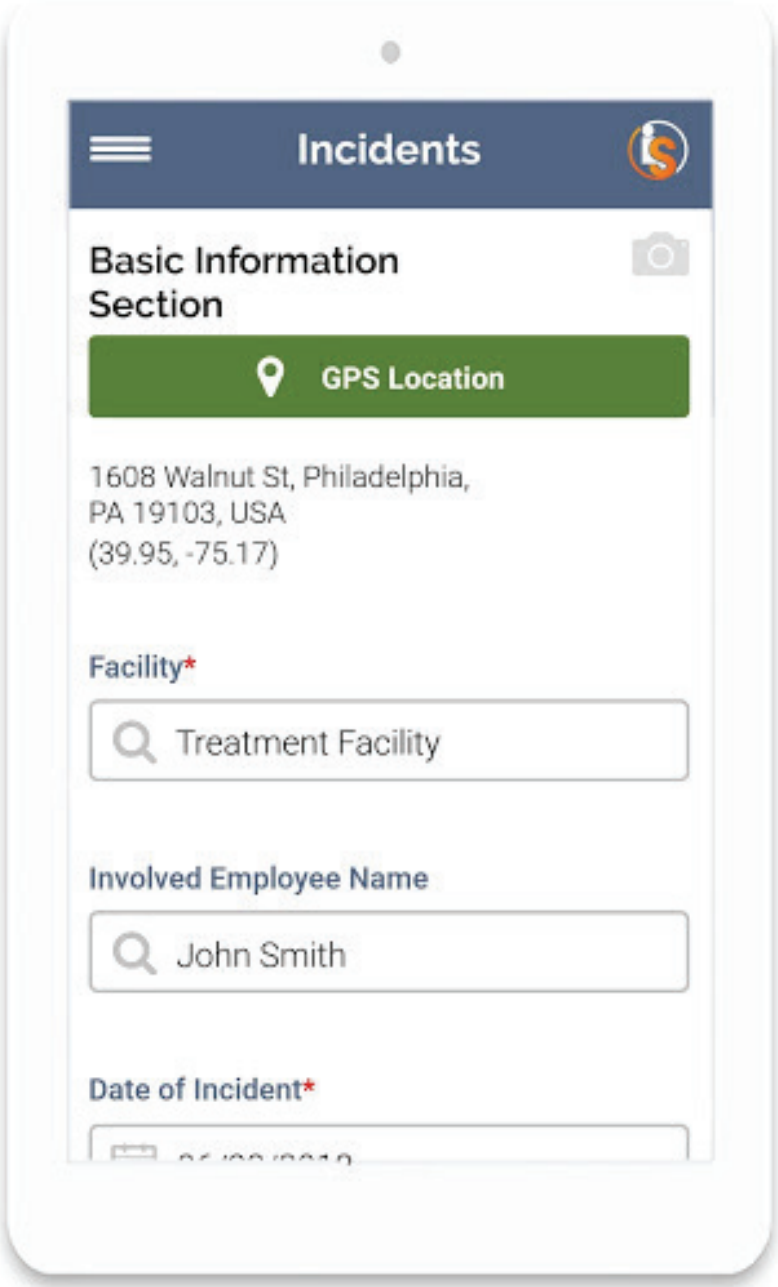
EVALUATING EHS SOFTWARE PROVIDERS

Mobile Functionality

Your workers probably aren't tied to their desks. They have to be on the move to meet challenges as they arise. When they're on the go or working out in the field, a mobile-friendly EHS management solution is exactly what they'll need.

As you shop, ask the following questions to gauge what mobile options providers offer.

- Can the software be accessed on mobile devices such as smartphones and tablets (both Android and iOS)?
- Is a mobile app available for field or offline use?
- If so, is there an extra cost associated with using the mobile app or is access included with your subscription?
- What features does the mobile app offer to simplify data entry and documentation of safety activities? For example, can you simply drop a pin to find your location? Is it possible to take, annotate, and attach photos to forms?



Reporting & Automation

Reporting is one of the most important aspects of an EHS management system. In addition, studies show that dissatisfaction with reporting capabilities is one of the most common reasons why companies quit using one EHS management system and begin using another. Automating certain tasks, including generating reports, can save a lot of time, effort, and frustration. Use the list below to be sure you get reporting and automation functionality that will serve you well.

- Is it easy to run, view, schedule, and email reports? Can the system be set up to automatically generate specific reports on a regular, recurrent basis (such as weekly, monthly, etc.) and deliver the reports via email with current safety data to yourself and/or others in the company?
- Does the system allow you to generate a report and then export the data into common formats, such as an Excel spreadsheet, PDF, and/or CSV?
- Does the system provide an ability to configure your own custom reports? If so, how does that work?
- Do the reports include easy-to-understand graphs, charts, and other visual displays? How much control do you have over data visualization options?
- Does the system automatically notify supervisors and key team members of significant events, such as new incidents or hazards? If so, what triggers these notifications and how are the notifications delivered?
- Does the system automatically notify employees of their responsibilities, including things like new corrective actions or training assigned, due dates approaching, and similar?

EVALUATING EHS SOFTWARE PROVIDERS

Future Growth & Scalability

It's also important to choose the option that can meet your future needs in addition to your present needs.

Questions to ask:

- How regularly is the software updated?
- What is the product roadmap?
- How often are new features delivered?
- How are new features and modules decided upon?
- How are customers notified of new features, and how do they get access to these new features?
- What will the core capability be in 5 years?
- How is your organisation going to change in the future, and will this software solution meet those needs?
- Is the system scalable so it can grow as your company and/or safety management needs grow?

Customer Support & Professional Services

Finally, when you're selecting a software provider, you want to go with a vendor that has a strong track-record of deployment success and some of the most satisfied clients in the industry. You want in-house EHS software experts that know the software better than anyone else and can communicate clearly with you to solve your problems quickly.

Make sure to ask:

- What kinds of customer support does a vendor offer?
- How responsive are they?
- What resources do they offer to help you implement their solution?
- Do they offer an online knowledge base, webinars, and other support resources?

EVALUATING EHS SOFTWARE PROVIDERS

Look for software providers with a clear implementation strategy that includes: measurable goals, action items and timelines that can be implemented with the assistance of support documentation and live or web-based training sessions with a software expert.

Other Things to Consider as You Shop

Different companies will have their own unique considerations that are important to them and/or don't fit in one of the categories we listed above. Here's our own attempt to get you started with a list of additional considerations.

- Do they allow you to view/obtain a demo account of their EHS management system? If so, what type of demo is available?
- Do they offer referrals from their existing customers?
- What is their pricing and what pricing options do they offer?
- Does the provider have a proven history of working in workplaces like yours and with workforces like yours?
- Can the platform be displayed in different languages for different users? If so, in which languages, and how does that work?
- What are the username/password requirements? Is an email address required for frontline employees to log in?
- What other software applications, if any, might your company want to buy in order to fully utilize the EHS management system and/or complement the system?
- How does the company manage downtimes for updates and scheduled maintenance?
- Does the software support Single-Sign-On (SSO) capabilities?
- Can your company's branding/logo be added to the software? If so, to what extent?

Finally, how long has the company been in business? Since many software companies have emerged in the past decade - and since many have gone out of business within a handful of months or years - it is highly valuable to know how long a business has been operating.

EVALUATING EHS SOFTWARE PROVIDERS

An established company with a decade or more of experience in software development (and a strong record of client satisfaction and sustainable growth) certainly carries more credibility than a 'fly-by-night' operation with fewer than three years of experience. It's also important to be cautious with young companies that boast attractive, seemingly cost-effective pricing models. Proven experience and a sound reputation are invaluable qualities and worth factoring into any purchasing decision.

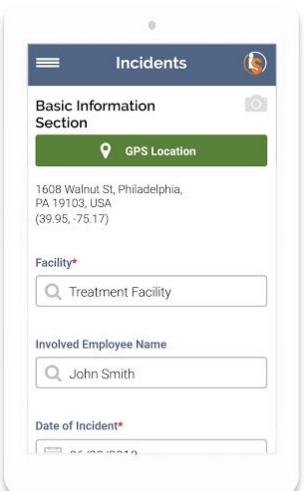
PART VII

CONCLUSION

CONCLUSION

Selecting the right EHS software solution is a challenging choice with many factors to consider. We hope that following through on some of the points and questions above can give some added value to your selection process.

Let us know if you'd like to talk about our EHS Management; online training products, including online safety, maintenance, and AEC training courses, learning management system; risk intelligence communication software; and more.



EHS, LMS, AND RISK COMMUNICATION SOLUTIONS FOR YOUR WORKPLACE

Vector Solutions is the leading provider of award-winning, intelligent SaaS solutions that help organizations and individuals operate at the highest level and prepare for more challenging workplaces and environments.

Our comprehensive suite of software products make you safer, smarter, better.

- EHS management software
- LMS for safety training administration & management
- Online safety training courses for general industry, construction, and mining/MSHA
- Mobile safety management apps
- Risk intelligence communication software

Learn More