CTS User Manual

Employee Teams

Last Edited: 22 November 2022

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Introduction

The CTS Programs provide a user-friendly means (for users granted permissions) to maintain and manage worker responsibilities. With tools fashioned specifically for employee teams, this software can save valuable resources by streamlining certain workflow processes.

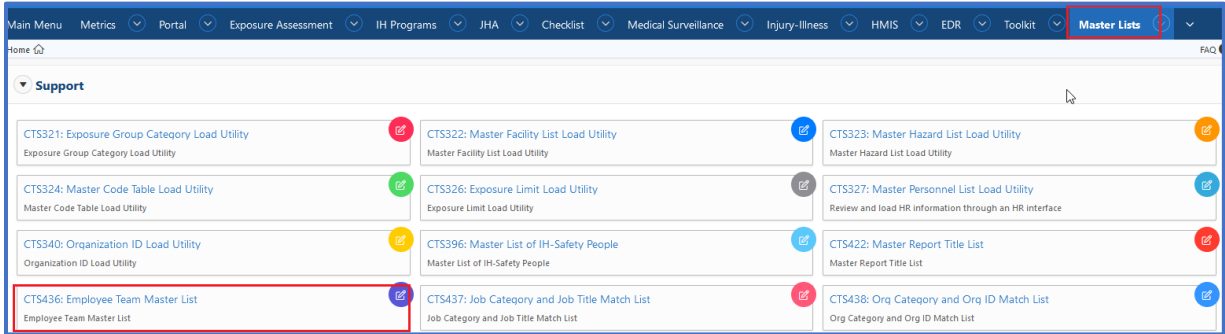This manual focuses on four employee team features:

Master Lists Menu –

- CTS436

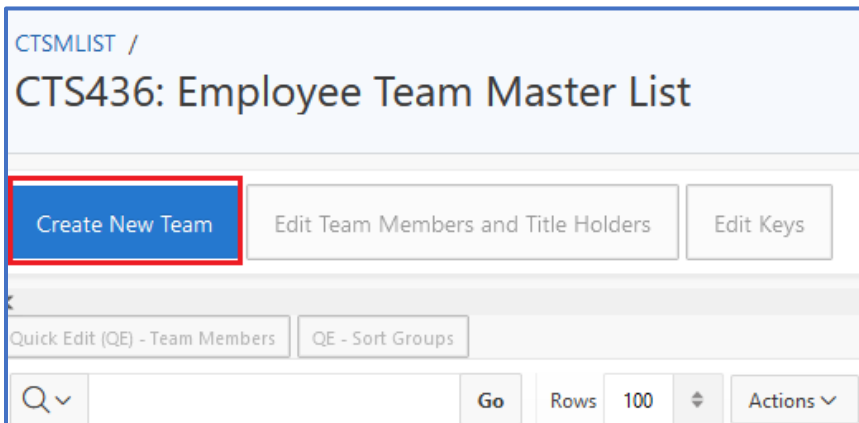**Portal Menu –**

- CTS659
- CTS658
- CTS664

Chapter 1 – CTS436: Employee Team Master List

From the **Master Lists** menu, under *Support* submenu click **CTS436: Employee Team Master List** button.

Create New Team

Click the **Create New Team** button.

Enter text into *Employee Team ID* and *Team Description* text fields.

Use pulldown menus to select Employee Team Sort Group 1-5.

If no sort groups exist, click the **Select Sort1** button.

Click the **New Item** button.

Enter sort group title in *Translation* text field.

Click the **Save and Continue** button.

Click blue **Select** text to select new sort group option.
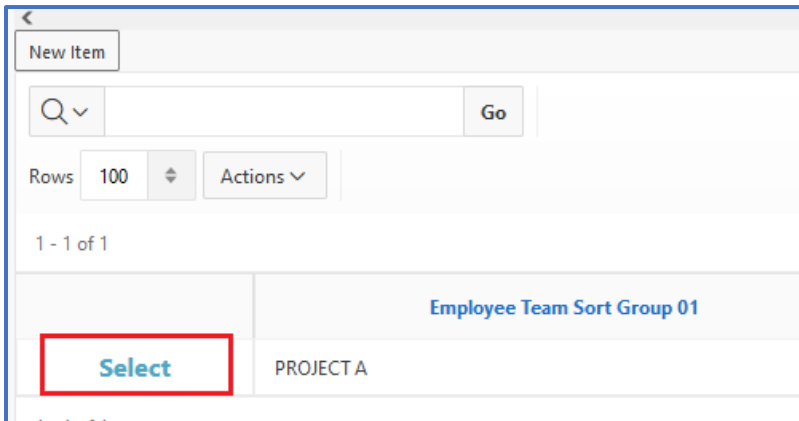
Repeat for remaining sort groups as needed.

After selecting sort group options, click the **Save and Continue** button on the *Add Employee Team* screen.
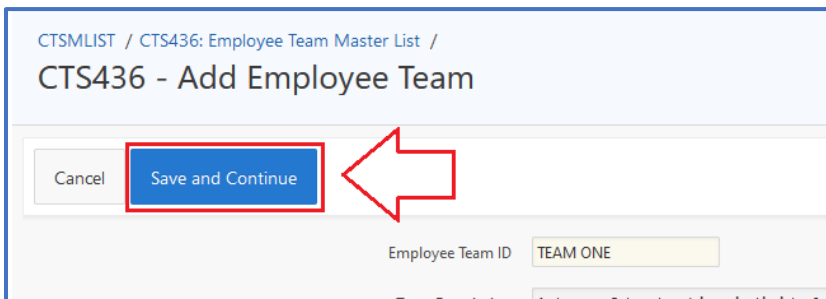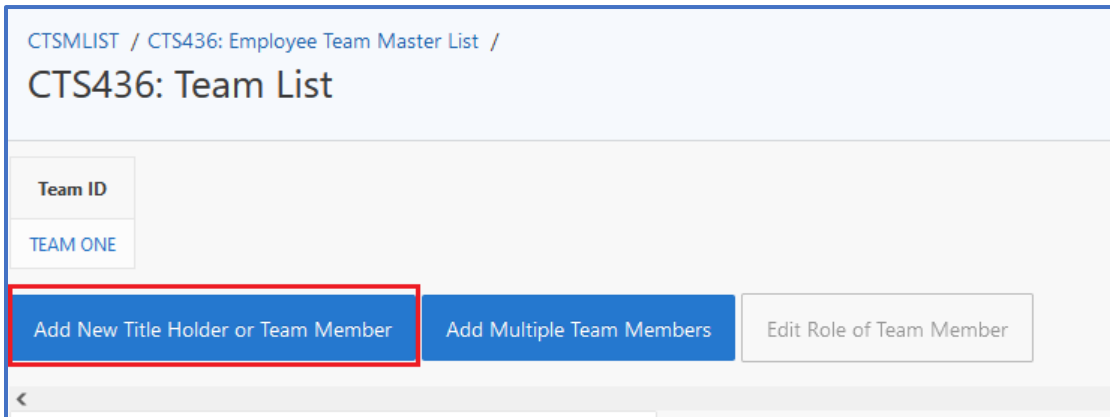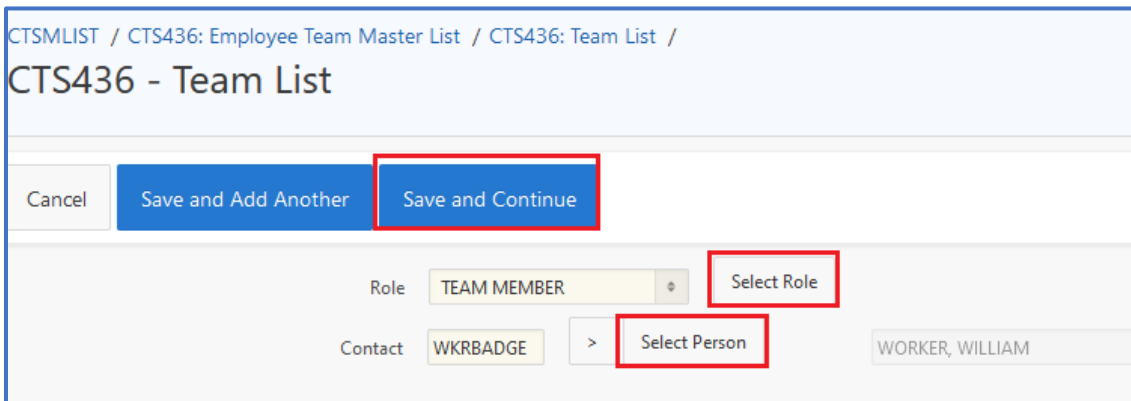

Add Team Members

Once a team has been created, team members can be added to the team.
Click a radio button to select a team, then click the **Edit Team Members and Title Holders** button.
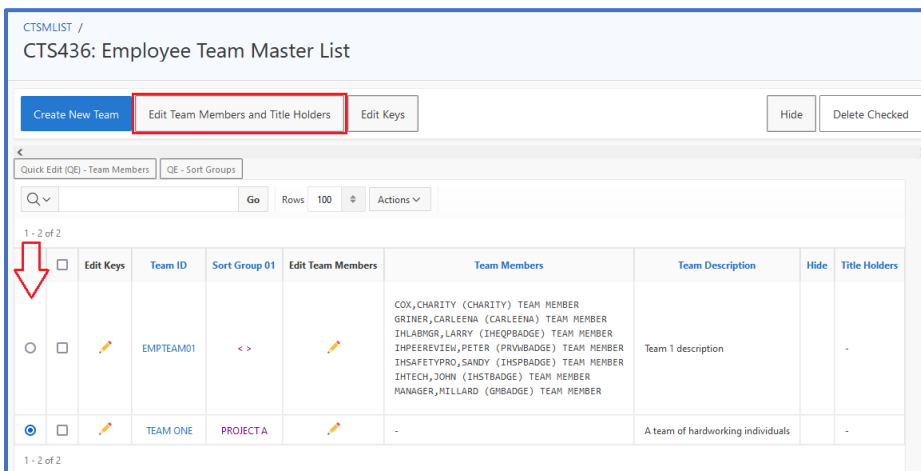
Click the **Add New Title Holder or Team Member** button.

Click the **Select Role** button to choose a *Role* for the team member.
Click the **Select Person** button to choose a team member.
Click the **Save and Continue** button.

Multiple team members can be added at once by clicking the **Add Multiple Team Members** button.

When finished adding team members, click the *CTS436: Employee Team Master List /* breadcrumb to return to the main team screen.
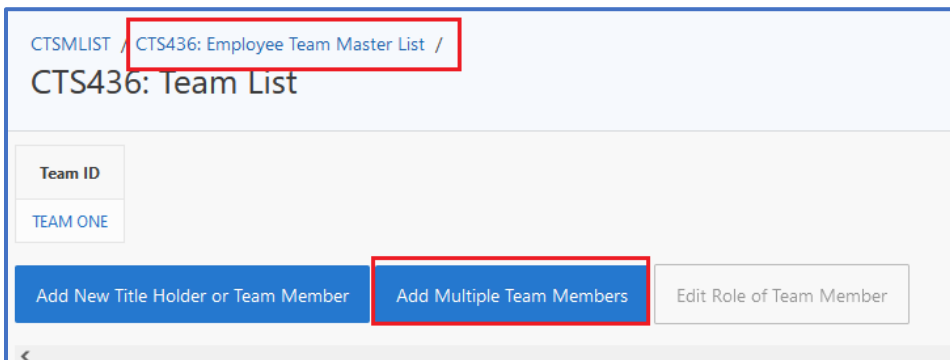
Edit Existing Team

To edit initial team information, click a radio button to select a team then click the **Edit Keys** button.

Edit team data. Click the **Save and Continue** button.

Delete Existing Team

To delete an entire team, click a checkbox to select a team.

Click the **Delete Checked** button.

Click **OK** in alert box to confirm delete.

Chapter 2 – CTS659: Employee Team Meetings and Membership

From the **Portal** menu, under the *Safety Portal* submenu click **CTS659: Employee Team Meetings and Membership** button.
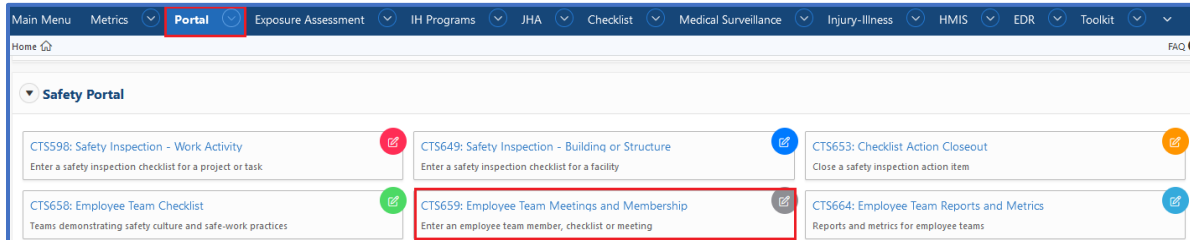
Click the **Select Team** button.
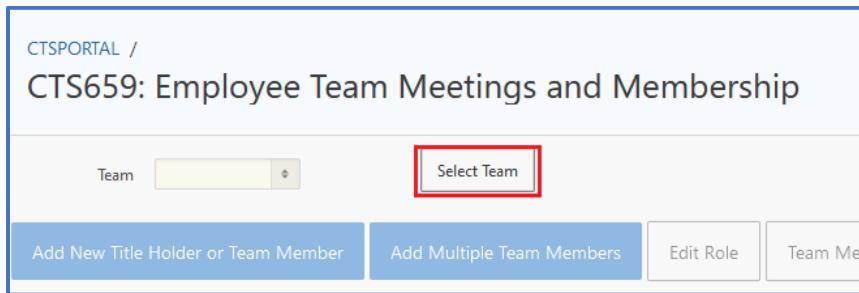
Click the blue **Select** text to select a Team.

Click the **Team Meetings and Activities** button.

Click the **Add Team Meeting or Activity** button.

Use the calendar button to select meeting *Date*.

Enter text into *# Attendees* text field.

Enter text into *Team Meeting Description or Note* text field.

Click the **Save and Continue** button.

Click the *CTS659: Employee Team Meetings and Membership /* breadcrumb to return to previous screen.

Click on the **Add New Title Holder or Team Member** button.

Select a role using the **Select Role** button and Select a person using the **Select Person** button.

Click the **Save and Continue** button.

Note: Multiple team members can be added at once by clicking the **Add Multiple Team Members** button.

Click the **Team Report** button to view the report in a new browser tab.

Close report browser tab when finished viewing checklist.

Delete Existing Team

Click a checkbox to select an employee.

Click the **Delete Checked** button.

Click **OK** in alert box to confirm delete.

Click *CTSPORTAL /* breadcrumb to return to the **Portal** menu.

Chapter 3 – CTS658: Employee Team Checklist
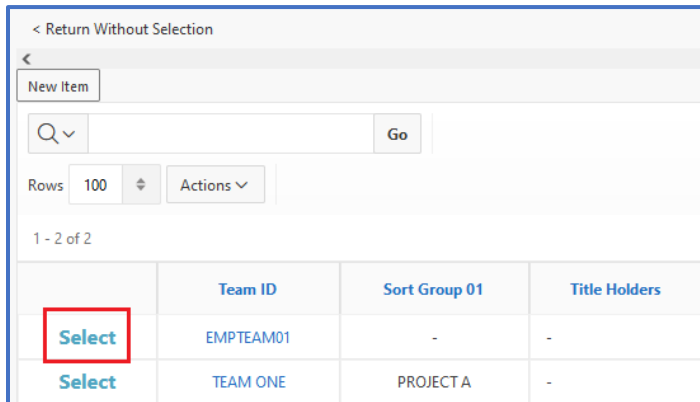
From the **Portal** menu, under the *Safety Portal* submenu click **CTS658: Employee Team Checklist** button.
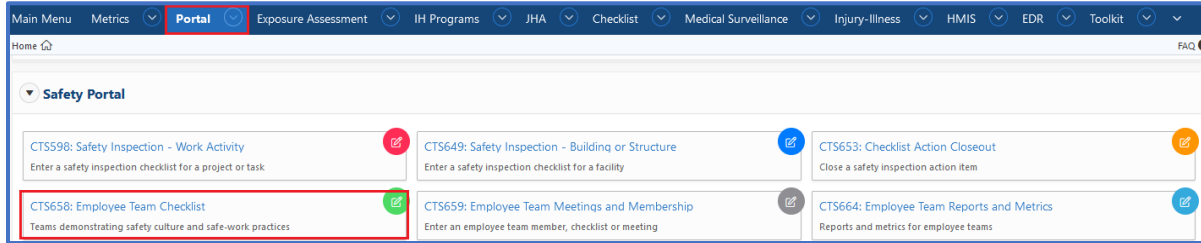
Click the **Select Person** button to select an *Employee Badge*.

Note: Assumption is a team has been created under the **Master List CTS436: Employee Team Master List**.

Use pulldown menu to select *Employee Team*.

Click the **Checklist Report** button to view the report in a new browser tab.

Checklist Report

Checklist ID:	**s0000024**
Last Updated:	**17-NOV-2022**
Employee Team:	**EMPTEAM01**
Employee:	**CHARITY COX, CHARITY**

Checklist

01	ISM CORE FUNCTION 1: DEFINE THE SCOPE OF WORK		
	ID	**Question**	**Completed**
	01.01	Attend Safety Pause and document attendance on employee team website	
	01.02	Inspect work area for slip/trip hazards	
	01.03	Review Dehydration in Winter on the safety website	
	01.04	Register for the Y-12 Code Stress Notifications	

02	ISM CORE FUNCTION 2: ANALYZE THE HAZARDS		
	ID	**Question**	**Completed**
	02.01	Identify a bollard that should be extended to improve visibility	
	02.02	Create a family fire safety plan	
	02.03	Attend slip simulator training	
	02.04	Perform vechile walk around-circle your automobile (blue cones)	
	02.05	Turn off and unplug unoccupied portable heater	
	02.06	Teach family to properly select/insert hearing protection	
	02.07	Sign up for alert notifications to receive important safety-related communciations	
	02.08	Mentor new co-worker about safe operations	

03	ISM CORE FUNCTION 3: DEVELOP AND IMPLEMENT CONTROLS		
	ID	**Question**	**Completed**
	03.01	Spread ice chaser where needed to reduce slip/fall hazards	
	03.02	Participate in 2 wellness activitites	
	03.03	Use stairs instead of elevetor for 1 week	

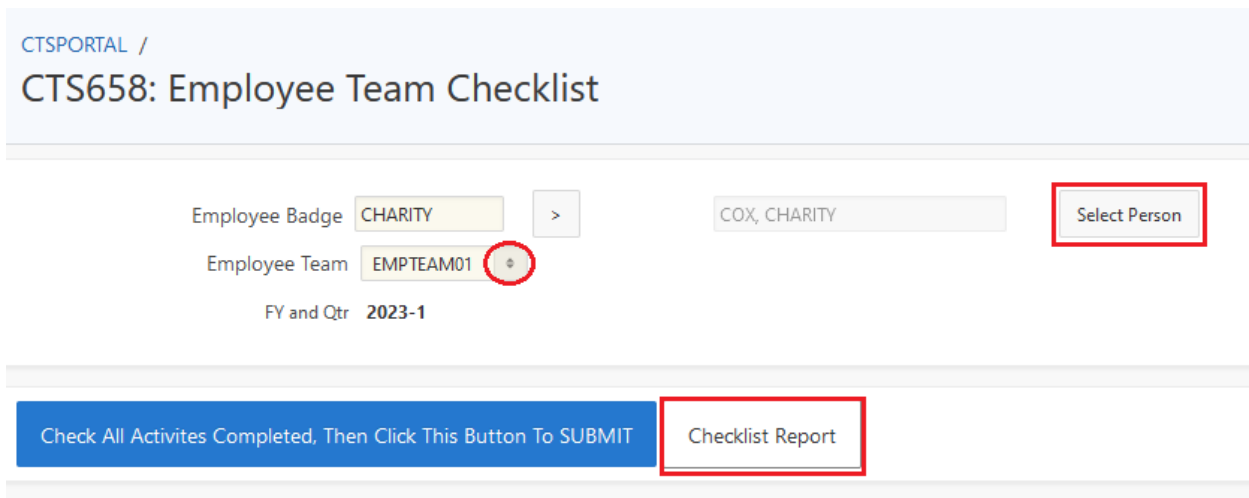| 04	ISM CORE FUNCTION 4: PERFORM WORK		
	ID	**Question**	**Completed**
	04.01	Install carbon detector at home	
	04.02	Volunteer to be a vehicle spotter	
	04.03	Routinely cleanup work area (perform good housekeeping)	
	04.04	Put winter travel kit/emergency kit in vehicle	
	04.05	Identify damaged too, tag and remove from service	

05	ISM CORE FUNCTION 5: PROVIDE FEEDBACK		
	ID	**Question**	**Completed**
	05.01	Subscribe to "My Lessons Learned" for your area of responsibility	
	05.02	Politely remind someone to use handrails	
	05.03	Lead a review of lessons learned in briefling/meeting	
	05.04	Go to Safety Dashboard on the Safety Web Page and review information on your organizations injuries and moto vechicle incidents	
	05.05	Identify actions intended to improve safety of operations	

06	OUR PRINCIPLES - QUESTIONING ATTITUDE		
	ID	**Question**	**Completed**
	06.01	Engage in a pre-job briefling by asking questions to generate a team discussion	
	06.02	Identify a dim lit area for evaluation and review	

07	OUR PRINCIPLES - KNOW BEFORE DO		
	ID	**Question**	**Completed**
	07.01	Walk down the job, identify the hazards and required personal protective equipment	
	07.02	Share at a meeting/pre-job briefing what safety excellence looks like to you	
	07.03	View 2 videos on pressure safety	

Close browser tab when finished viewing report.

Expand all submenus. Click *Check if Completed* checkboxes on items that have been completed.

Click the **Check All Activities Completed, Then Click This Button To SUBMIT** button.

A message in red text displays onscreen confirming submission.

To delete a checklist, select an existing person and team.

Click the **Delete** button.

Click the **OK** button in alert box to confirm delete.
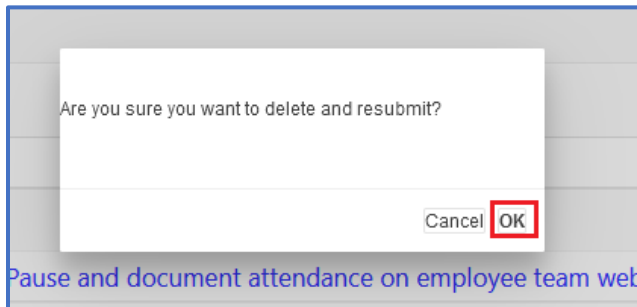
Click the *CTSPORTAL /* breadcrumb to return to the **Portal** menu.

Chapter 4 – CTS664: Employee Team Reports and Metrics

From the **Portal** menu, under the *Safety Portal* submenu click **CTS664: Employee Team Reports and Metrics** button.
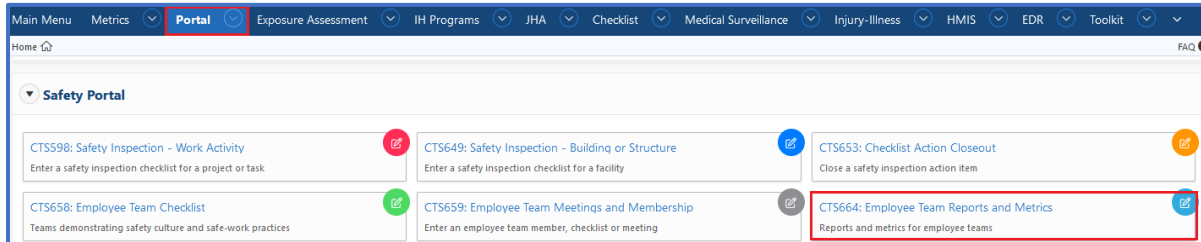
Quarterly Metrics Report

Click the blue **CTS664: Employee Team Checklist – Quarterly Metrics** text.
Use calendar buttons to select **Start** and **End** dates for *Employee Team Summary Metrics* report.
Click the **Click to Run Employee Team Summary Metrics (filters on entered dates)** button to view report in a new browser tab.
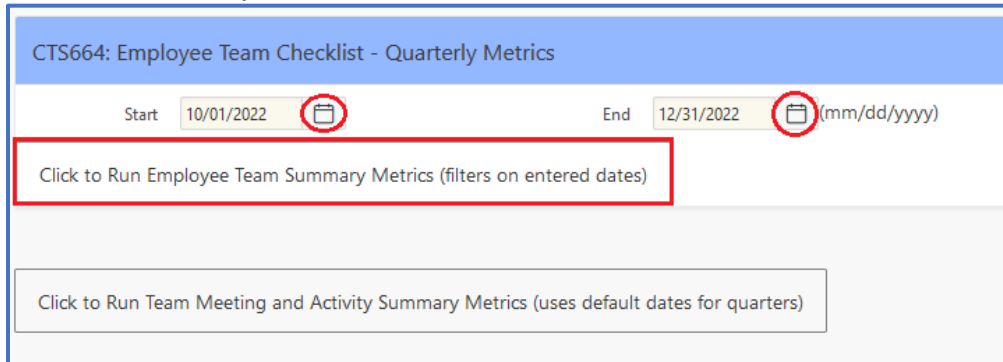
Total Sheets:	1 (if top count of sheets does not match grid count some sheets are still in-process or the sort group, like contractor was not selected)
# of Items Marked:	29
Average # Marked:	29
Date Range:	10/01/2022 - 12/31/2022

Sort Group 1	Team ID	# Sheets	# Team Members	% Participation
PROJECT A	TEAM ONE	0	0	0
Totals	1	0	0	0

Senior Management Sponsor	Team ID	# Sheets	# Team Members	% Participation
CHARITY COX	EMPTEAM01	1	8	12.5
Totals	1	1	8	12.5

Close browser tab when finished viewing report.

Click the **Click to Run Team Meeting and Activity Summary Metrics (uses default dates for quarters)** button to view report in a new browser tab.

CTS664: Employee Team Checklist - Quarterly Metrics

Start   10/01/2022 📅   End   12/31/2022 📅 (mm/dd/yyyy)

Click to Run Employee Team Summary Metrics (filters on entered dates)

Click to Run Team Meeting and Activity Summary Metrics (uses default dates for quarters)

Current Quarter :	07/01/2022 - 09/30/2022
Previous Quarter:	04/01/2022 - 06/30/2022

Sort Group 1	# Team Meetings Previous Qtr	# Team Meetings Current Qtr	# Attendees	# Team Members	% Participation
PROJECT A	0	0	0	0	0
Totals	0	0	0	0	0

Senior Management Sponsor	Team ID	# Team Meetings Previous Qtr	# Team Meetings Current Qtr	# Attendees	# Team Members	% Participation
CHARITY COX	EMPTEAM01	0	0	0	8	0
Totals	1	0	0	0	8	0

Close browser tab(s) when finished viewing report.

Checklist Export By Activity

Click the blue **CTS664: Employee Team Checklist Export by Activity** text.

Use calendar buttons to select **Start** and **End** dates for *Export by Activity* report.

Click the **Click to refresh Team Checklist with start/stop date** button.

Use pulldown menu to toggle from *Completed Checklists* to *All Checklists*.

Click any **EMPTEAM01** hotlink to view employee team report in a new browser tab.

Close browser tab(s) when finished viewing report.

Click any **SURVEY ID** hotlink to view report in a new browser tab.

Survey ID

Inspection Survey ID:	**s0000024**
Inspection Date:	17-NOV-2022
Status:	COMPLETE
Inspector:	COX,CHARITY (CHARITY)

Checklist Groups and Items

Sort Order	Title		
01	ISM CORE FUNCTION 1: DEFINE THE SCOPE OF WORK		
	ID	**Completed**	**Activity**
	01	Yes	Attend Safety Pause and document attendance on employee team website
	02	Yes	Inspect work area for slip/trip hazards
	03	Yes	Review Dehydration in Winter on the safety website
	04	Yes	Register for the Y-12 Code Stress Notifications
02	ISM CORE FUNCTION 2: ANALYZE THE HAZARDS		
	ID	**Completed**	**Activity**
	01	Yes	Identify a bollard that should be extended to improve visibility
	02	Yes	Create a family fire safety plan
	03	Yes	Attend slip simulator training
	04	Yes	Perform vechile walk around-circle your automobile (blue cones)
	06	Yes	Teach family to properly select/insert hearing protection
	07	Yes	Sign up for alert notifications to receive important safety-related communciations
	08	Yes	Mentor new co-worker about safe operations
03	ISM CORE FUNCTION 3: DEVELOP AND IMPLEMENT CONTROLS		
	ID	**Completed**	**Activity**
	01	Yes	Spread ice chaser where needed to reduce slip/fall hazards
	02	Yes	Participate in 2 wellness activitites
	03	Yes	Use stairs instead of elevetor for 1 week

Sort Order	Title		
04	ISM CORE FUNCTION 4: PERFORM WORK		
	ID	**Completed**	**Activity**
	01	Yes	Install carbon detector at home
	02	Yes	Volunteer to be a vehicle spotter
	03	Yes	Routinely cleanup work area (perform good housekeeping)
	04	Yes	Put winter travel kit/emergency kit in vehicle
	05	Yes	Identify damaged too, tag and remove from service
05	ISM CORE FUNCTION 5: PROVIDE FEEDBACK		
	ID	**Completed**	**Activity**
	01	Yes	Subscribe to "My Lessons Learned" for your area of responsibility
	02	Yes	Politely remind someone to use handrails
	03	Yes	Lead a review of lessons learned in briefing/meeting
	04	Yes	Go to Safety Dashboard on the Safety Web Page and review information on your organizations injuries and moto vechicle incidents
	05	Yes	Identify actions intended to improve safety of operations
06	OUR PRINCIPLES - QUESTIONING ATTITUDE		
	ID	**Completed**	**Activity**
	01	Yes	Engage in a pre-job briefing by asking questions to generate a team discussion
	02	Yes	Identify a dim lit area for evaluation and review
07	OUR PRINCIPLES - KNOW BEFORE DO		
	ID	**Completed**	**Activity**
	01	Yes	Walk down the job, identify the hazards and required personal protective equipment
	02	Yes	Share at a meeting/pre-job briefing what safety excellence looks like to you
	03	Yes	View 2 videos on pressure safety

Close browser tab(s) when finished viewing report.

Team Meeting Export

Click blue **CTS664: Employee Team Meeting Export** text.

Use calendar buttons to select **Start** and **End** dates for *Employee Team Meetings* report.

Click the **Click to refresh Team Meetings list with start/stop date** button.

Click the *Actions* drop-down button to filter report options.

Click *Download* to save report in CSV or HTML format.

Close browser tab when finished viewing report.

Team and Role Export

Click the blue **CTS664: Employee Team and Role Export** text.

Click checkbox(es) to select record(s).

Click the **Export Email List of Checked Records** button.

Click any **Team ID** hotlink to view employee team report in a new browser tab.

Close browser tab(s) when finished viewing report.

Click the *CTSPORTAL /* breadcrumb to return to the **Portal** menu.