



SAFEOCS PROGRAM

Industry Safety Data (ISD)

User Guide

SAFEOCS

ISD User Guide

VERSION 3.0

Last revised Oct. 28, 2021

Office of Safety Data and Analysis (OSDA)

Bureau of Transportation Statistics (BTS)

Department of Transportation (DOT)

1200 New Jersey Avenue

Washington, DC 20590

<https://safeocs.gov/>

SafeOCS@dot.gov

TABLE OF CONTENTS

1	Background	2
2	Access the SafeOCS Reporting System	3
3	Create a User Account	4
4	Submit ISD Data Online	6
	STEP 1: LOG IN TO SAFEOCS ACCOUNT	6
	STEP 2: AGREE TO THE CONFIDENTIALITY AND BURDEN STATEMENTS	7
	STEP 3: SELECT ISD DATA FILE TO BE UPLOADED	8
	STEP 4: VIEW YOUR HISTORY OF ISD DATA SUBMISSIONS	10
5	Access ISD Dashboard	11
	SYSTEM REQUIREMENTS	11
	STEP 1: LOG IN TO ISD DASHBOARD PORTAL	11
	STEP 2: OPEN THE TABLEAU FILE	12
	STEP 3: EXPLORE DATA	13
	STEP 4: PRINT DATA	14
	DASHBOARD NAVIGATION TIPS	14

ABOUT GUIDE

This document was developed to assist participating oil and gas industry companies with submitting ISD data and viewing the ISD dashboard that contains company-specific data along with aggregate data.

Specifically, this document provides guidance on:

- Accessing the SafeOCS Reporting System
- Creating a user account
- Submitting ISD data
- Accessing the ISD Dashboard Portal

1 Background

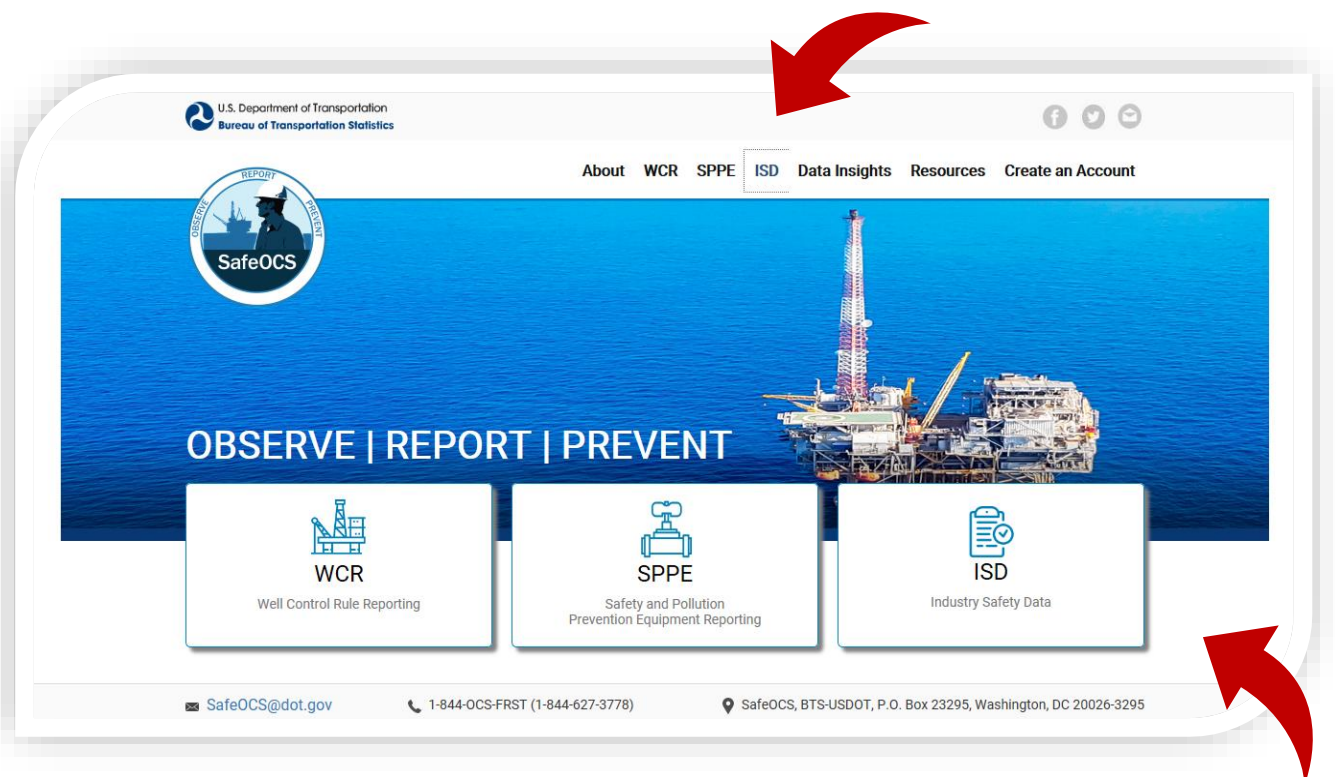
The Industry Safety Data (ISD) program, a component of BTS's SafeOCS data sharing framework, provides a trusted, proactive means for the oil and gas industry to report sensitive and proprietary safety information, and to identify early warnings of safety problems by uncovering hidden at-risk conditions not previously exposed from analysis of reportable accidents and incidents. Through comprehensive analysis by professional statisticians and industry subject matter experts, the program allows the identification of trends or patterns before safety is compromised and provides a tool for continuous improvement by focusing on fixing impediments to safety.

The scope of ISD data includes incidents, near misses, stop work events, and associated metadata. ISD data can be submitted in whatever format participating companies currently use to minimize their reporting burden.

2 Access the SafeOCS Reporting System

The SafeOCS Reporting System can be accessed through the SafeOCS program website at www.safeocs.gov (Figure 1). To submit industry safety data, you must first create an account. Once you have an account, you can select the *ISD icon* from the *home page* or from the *ISD tab* on the main navigation bar to access the *Submit ISD Data* page where you can submit ISD data. The remainder of this user guide provides step by step instructions for creating an account and submitting ISD data online.

Figure 1: SafeOCS Home Page



3 Create a User Account

OVERVIEW

Since data reported to SafeOCS are confidential and protected under the *Confidential Information Protection and Statistical Efficiency Act of 2002 (CIPSEA)* (44 U.S.C. §3501 note), a user has to establish an account in the SafeOCS Reporting System (outlined below) before he/she can submit industry safety data.

STEP-BY-STEP INSTRUCTIONS

Complete the Account Registration Form

1. Click on the *Create an Account* tab from the SafeOCS home page.
2. Complete the *Account Registration Form (Figure 2)*.
3. Click *Create Account* to complete registration.
4. The following pop-up message confirms the successful submission of the registration form:
“Thank you for registering for a user account. To complete your registration, check your email for a validation link.”

Note: Select a password with 12 or more characters with a mix of letters (uppercase and lowercase) and numbers.

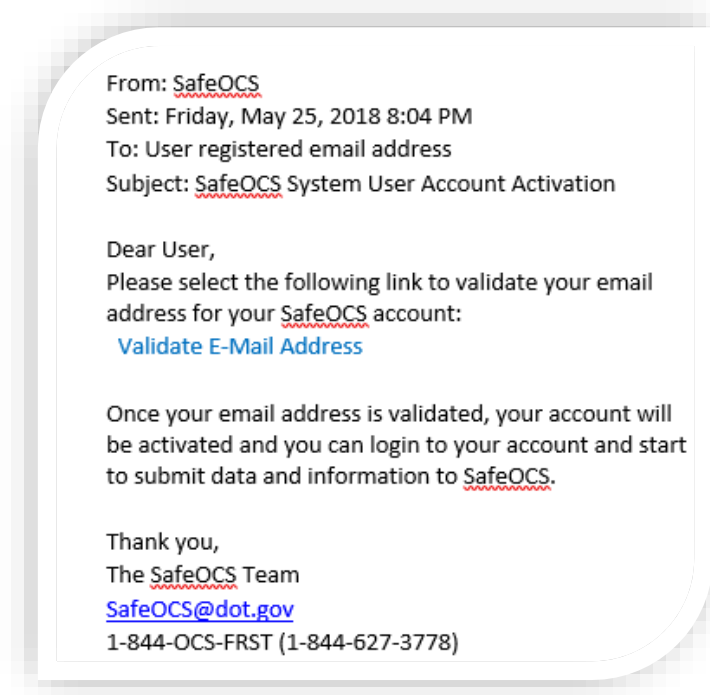
Figure 2: SafeOCS Account Registration

The screenshot shows the SafeOCS Account Registration page. At the top, there is a navigation bar with the U.S. Department of Transportation Bureau of Transportation Statistics logo, social media icons, and a 'Create an Account' button. Below the navigation bar is a banner image of an offshore oil rig with the text 'SafeOCS Account Registration'. The main content area contains a registration form with the following fields: Company Name, Your First Name, Middle Name, Last Name, Your E-mail, Choose Password (ex: SamplePassword123), Re-enter Password, Supervisor's Name, Supervisor's Email, and Supervisor's Phone Number. A green 'Create Account' button is at the bottom of the form. To the right of the form is a 'Registration Instructions' box with three steps: 1. Complete registration form. 2. Validate registration by following the link provided in e-mail from SafeOCS@dot.gov. 3. Use your e-mail and password to log in to your account. At the bottom of the page, there are links for 'Log in' and 'Forgot password?'. A note at the bottom states: 'Note: Choose a password with 12 or more characters with a mix of letters (uppercase & lowercase) and numbers.' Two red arrows are overlaid on the image: one pointing to the 'Create an Account' button in the top navigation bar, and another pointing to the 'Create Account' button at the bottom of the form.

Validate Your Email Address

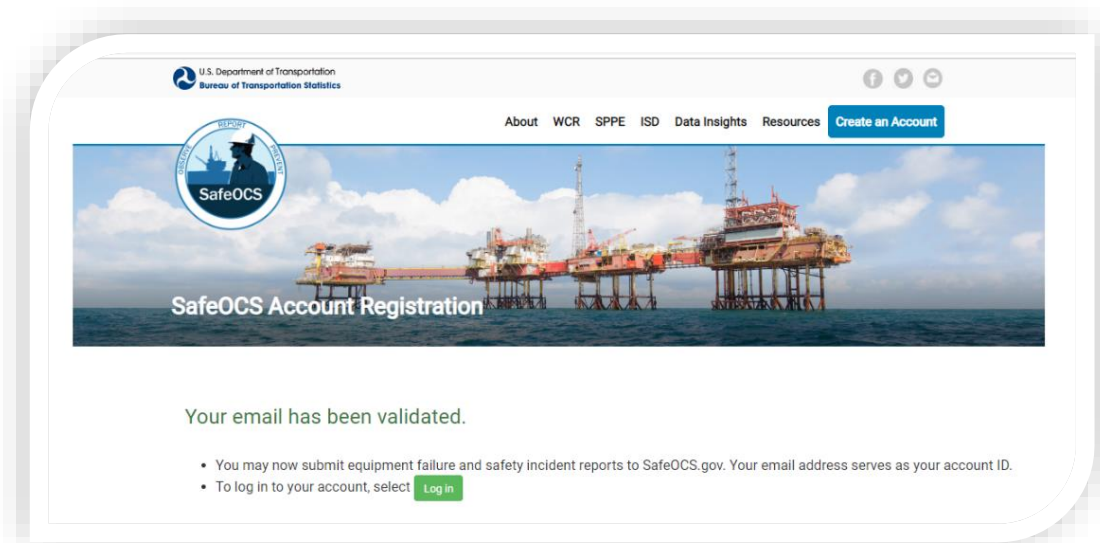
1. You will receive the following email sent from the *SafeOCS* system at the email address you provided in your *Account Registration Form* (**Figure 3**).

Figure 3: SafeOCS User Account Activation



2. Validate your email address by following the instruction in that email.
3. You will see a *Registration Confirmation* screen (**Figure 4**).

Figure 4: SafeOCS Account Registration Confirmation

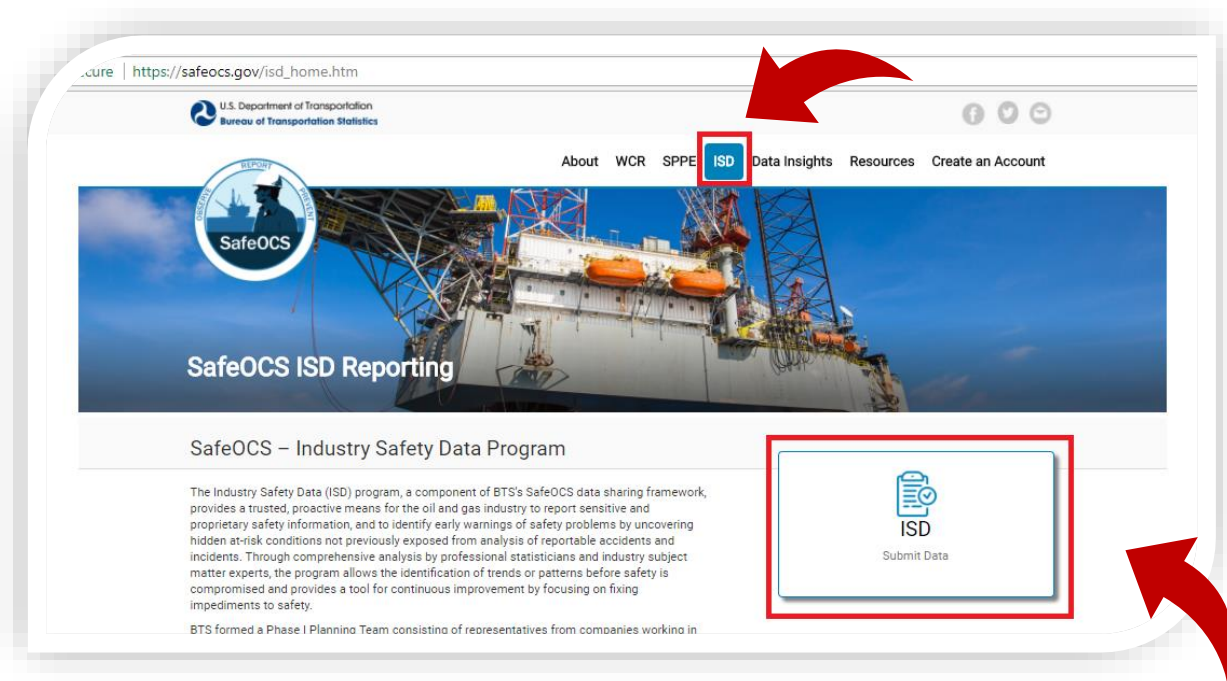


4 Submit ISD Data Online

STEP 1: LOG IN TO SAFEOCS ACCOUNT

1. Navigate to www.safeocs.gov.
2. Select the *ISD icon* from the home page or from the *ISD tab* on the main navigation bar (Figure 1).
3. Click on the *ISD Submit Data icon* (Figure 5).

Figure 5: Accessing the SafeOCS ISD Data Submission Portal



4. Enter *Email* and *Password* to log in to your SafeOCS account (Figure 6).

Figure 6: SafeOCS ISD Reporting Login

A screenshot of the SafeOCS ISD Reporting login form. It features two input fields: 'Email' with a person icon and 'Password' with a lock icon. Below the fields is a blue 'Log in' button. At the bottom left is a link for 'Create an Account' and at the bottom right is a link for 'Forgot password?'. A red arrow points to the 'Log in' button.

STEP 2: AGREE TO THE CONFIDENTIALITY AND BURDEN STATEMENTS

1. Read and consent to the Pledge of Confidentiality and Burden Statement.
2. Check the box for the “I have read...” statement and click on the **Continue** button (Figure 7).

Figure 7: SafeOCS Confidentiality and Burden Statements

Report or Update an Equipment Failure Event

Do NOT report emergencies to SafeOCS. In the event of an emergency please follow established procedures.

Burden Statement

A federal agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failure to comply with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a current valid OMB Control Number. The OMB Control Number for this information collection is 2138-0046 (Exp. Date 03/31/2017). Reporting of an Equipment Failure is estimated to take approximately 30 minutes, including the time for reviewing instructions, completing and reviewing

Pledge of Confidentiality

The information you provide will be used for statistical purposes only. In accordance with the BTS confidentiality statute (49 U.S.C. 6307) and the Confidential Information Protection provisions of Title V, Subtitle A, Public Law 107-347, your responses will be kept confidential and will not be disclosed in identifiable form to anyone other than BTS employees or BTS agents such as telephone interviewers. In accordance with these confidentiality statutes, only statistical and non-identifying data will be made publicly available through aggregate reports. By law, every BTS employee and

I have read and understood the Burden Statement and Pledge of Confidentiality.

Cancel Continue +

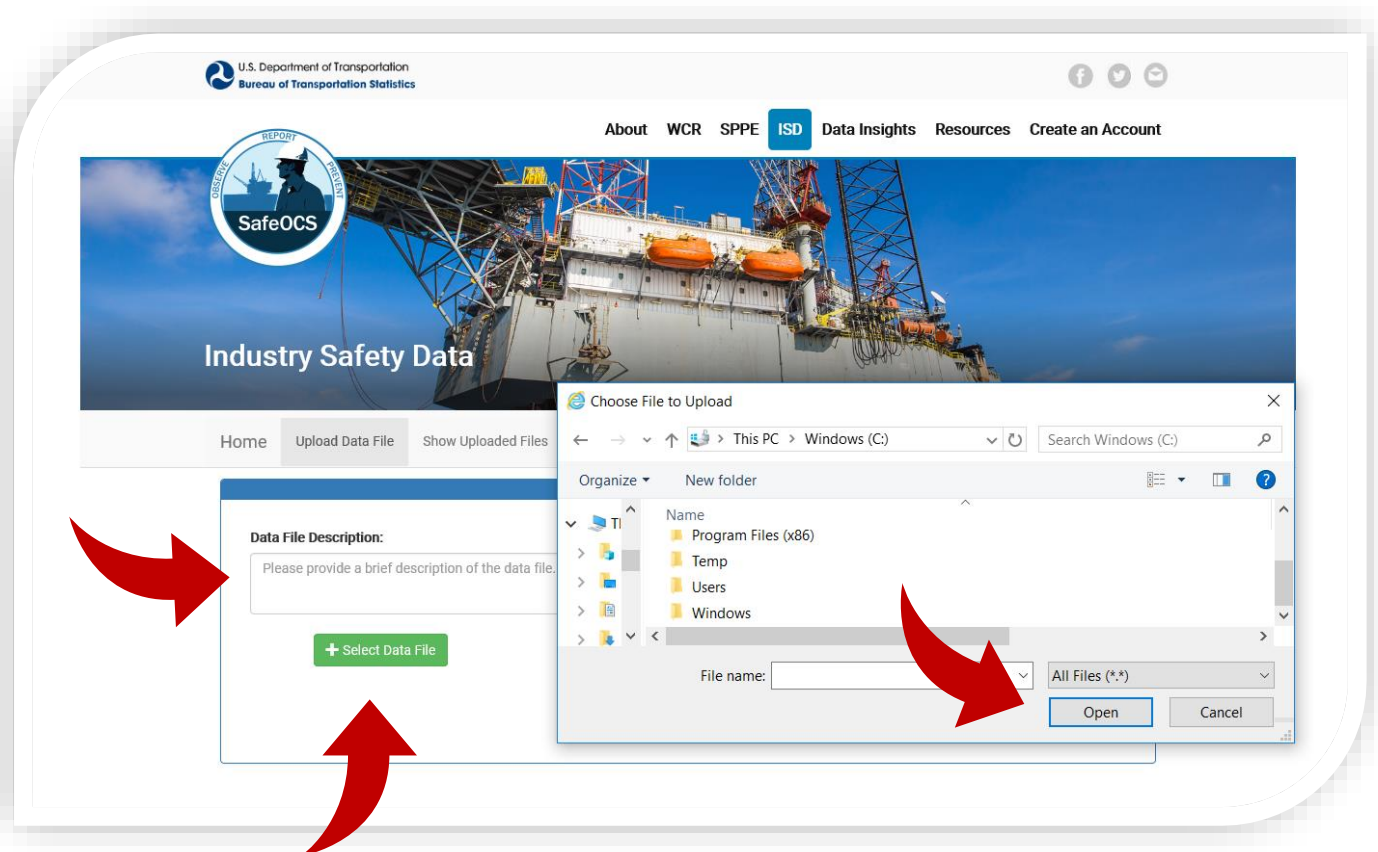
STEP 3: SELECT ISD DATA FILE TO BE UPLOADED

1. Completing Step 2 will bring up the screen shown in **Figure 8**.
2. Click on **Select Data File** and browse to your file location.
3. Select the file to be uploaded and then click **Open**.

Note: In this function, Windows Explorer allows selection of only one file at a time.

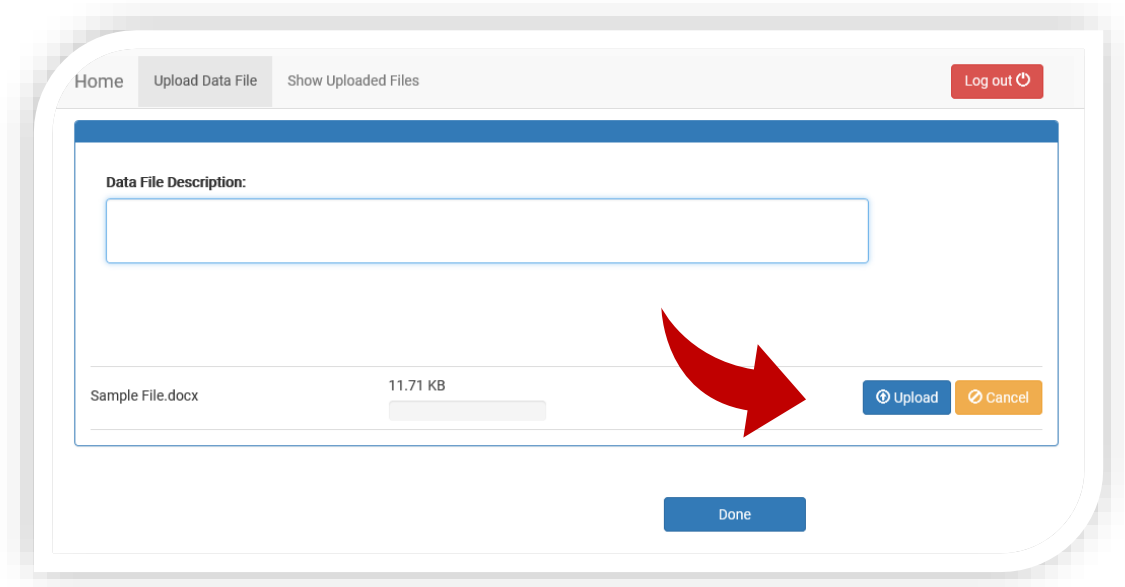
4. Provide a **Data File Description** for the file to be uploaded, such as “Near miss events in April 2018”.

Figure 8: Select a File to Upload



5. **Figure 9** shows that a file has been selected and is ready to be uploaded to the SafeOCS database.
6. Click **Upload** to upload the file.

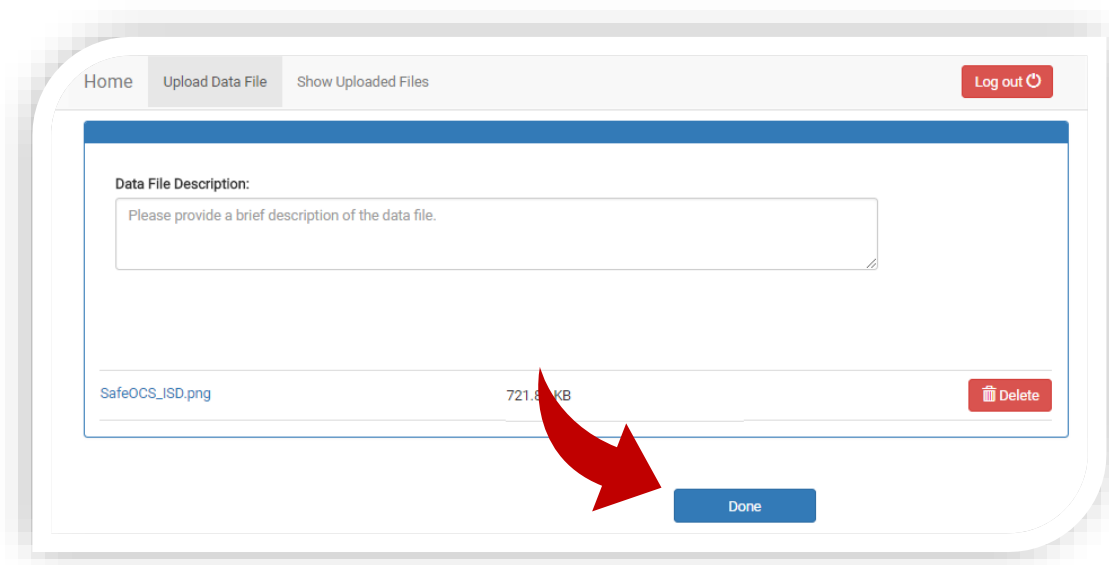
Figure 9: Start File Upload



Note: The upload is not final until the *Done* button is selected. Selecting the *Cancel* or *Delete* button next to the file will terminate the upload.

7. Select **Done** to finalize the upload of the selected file to the ISD database (**Figure 10**).

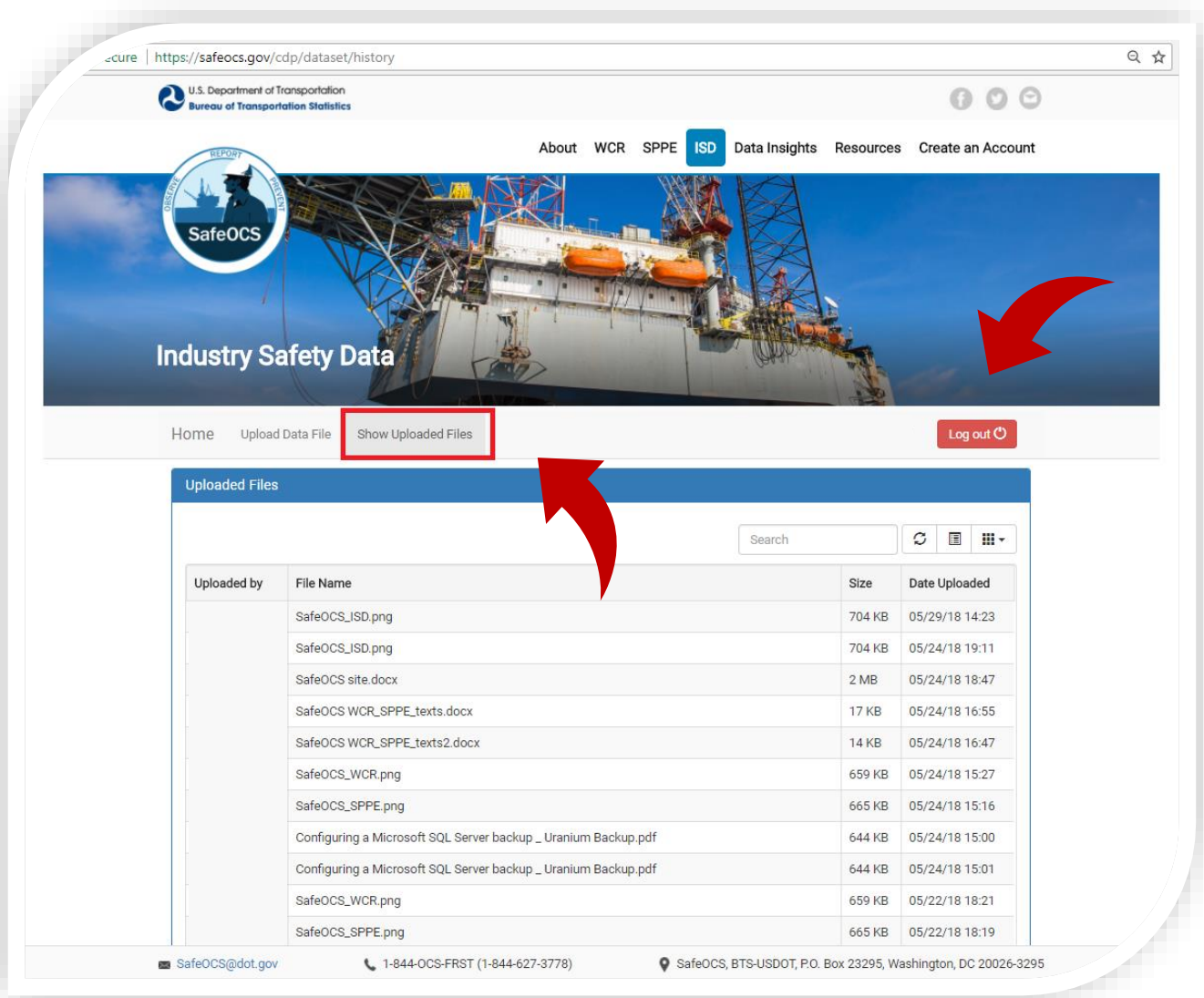
Figure 10: Finalize File Upload



STEP 4: VIEW YOUR HISTORY OF ISD DATA SUBMISSIONS

1. Select the **Show Upload History** tab in the sub-navigation bar of the *ISD* page to view a list of data files that have been uploaded to the database by the user (**Figure 11**).
2. Click **Log out** to terminate your session.

Figure 11: History of Submissions



The screenshot displays the SafeOCS website interface. The top navigation bar includes links for 'About', 'WCR', 'SPPE', 'ISD', 'Data Insights', 'Resources', and 'Create an Account'. The 'ISD' tab is highlighted. Below the navigation bar is a banner for 'Industry Safety Data' with a red arrow pointing to it. The sub-navigation bar contains 'Home', 'Upload Data File', 'Show Uploaded Files' (highlighted with a red box and a red arrow), and 'Log out'. The main content area is titled 'Uploaded Files' and contains a table with the following data:

Uploaded by	File Name	Size	Date Uploaded
	SafeOCS_ISD.png	704 KB	05/29/18 14:23
	SafeOCS_ISD.png	704 KB	05/24/18 19:11
	SafeOCS site.docx	2 MB	05/24/18 18:47
	SafeOCS WCR_SPPE_texts.docx	17 KB	05/24/18 16:55
	SafeOCS WCR_SPPE_texts2.docx	14 KB	05/24/18 16:47
	SafeOCS_WCR.png	659 KB	05/24/18 15:27
	SafeOCS_SPPE.png	665 KB	05/24/18 15:16
	Configuring a Microsoft SQL Server backup _ Uranium Backup.pdf	644 KB	05/24/18 15:00
	Configuring a Microsoft SQL Server backup _ Uranium Backup.pdf	644 KB	05/24/18 15:01
	SafeOCS_WCR.png	659 KB	05/22/18 18:21
	SafeOCS_SPPE.png	665 KB	05/22/18 18:19

At the bottom of the page, there is contact information: SafeOCS@dot.gov, 1-844-OCS-FRST (1-844-627-3778), and SafeOCS, BTS-USDOT, P.O. Box 23295, Washington, DC 20026-3295.

5 Access ISD Dashboard

The ISD Dashboard Portal, which is for accessing ISD dashboard files, is different than the Safety Data Portal (SDP), through which companies upload data to SafeOCS. You will use the same user account e-mail and password for both the SDP and the ISD Dashboard Portal, but your account must have additional authorization (i.e., access permissions) from SafeOCS to access to the ISD Dashboard Portal.

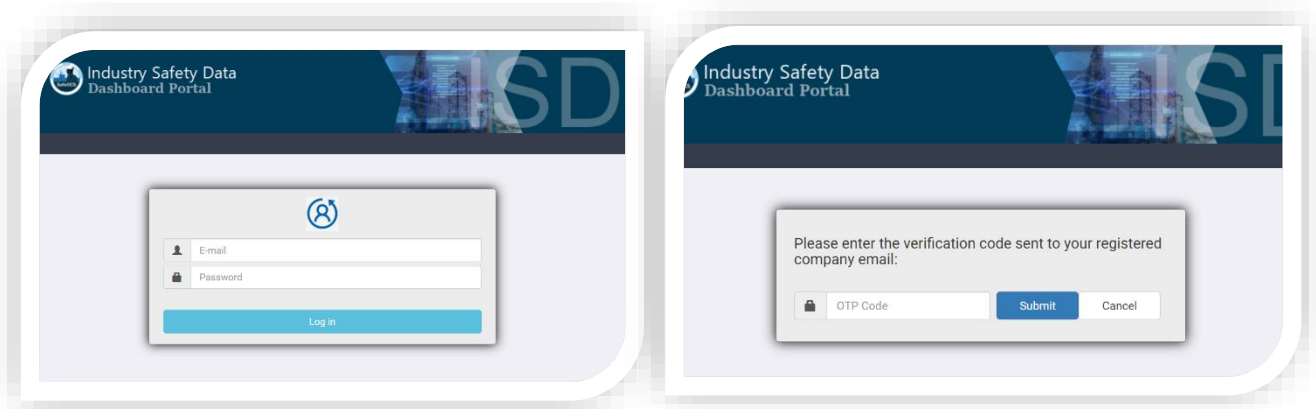
SYSTEM REQUIREMENTS

- 1. SafeOCS user account with authorization for the ISD Dashboard Portal.
- 2. Tableau Reader, which can be downloaded here: <https://www.tableau.com/products/reader>.
- 3. Software to open a password-protected zip file, such as SecureZip or WinRAR.

STEP 1: LOG IN TO ISD DASHBOARD PORTAL

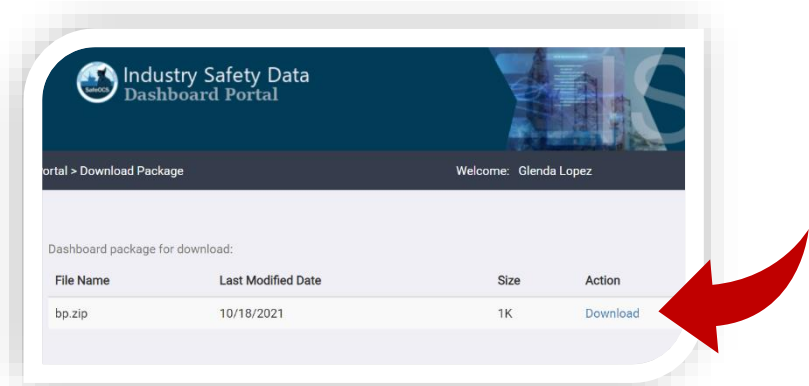
- 1. Navigate to <https://www.safeocs.gov/idp>.
- 2. Enter your SafeOCS user account e-mail and password (**Figure 12**).

Figure 12: Log in to ISD Dashboard



- 3. Enter the OTP (one time password) code sent to your registered company email when prompted.
- 4. Download the zip file on the landing page by clicking the blue *Download* link under action (**Figure 13**). Note: Access to company data is user-profile specific. Each user only has access to their own company data and the industry aggregate data for comparison.
- 5. Open and unzip the file using the BTS-provided password if prompted.

Figure 13: Download Zip File



6. Explore the three files in the zip folder:

- a. **MyCompany.twbx**: This file contains the ISD Dashboard. To open, use Tableau Reader.
 - i. *What events are included?* Only events categorized as with consequences and without consequences. Events categorized as unsafe action or observations are not included at this time.
 - ii. *What variables are included?* The subset of SafeOCS variables included in the dashboard are listed on the Data Dictionary page of the dashboard.
- b. **MyCompany.xlsx**: This is your company's event data transformed to the standardized SafeOCS variables and values. This file is provided so you can examine how your company's data was transformed and provide input to SafeOCS for improvement.
 - i. Note that this is a standalone file and not directly linked to the dashboard (i.e., it is not needed to run the dashboard file).
 - ii. *What events are included?* It contains all events for those dates included in the current dashboard release.
 - iii. *What variables are included?* All SafeOCS variables are included.
- c. **VariableList.xlsx**: This is a reference file summarizing the structure of the database and providing a complete list of SafeOCS variables, including their values and definitions.

STEP 2: OPEN THE TABLEAU FILE


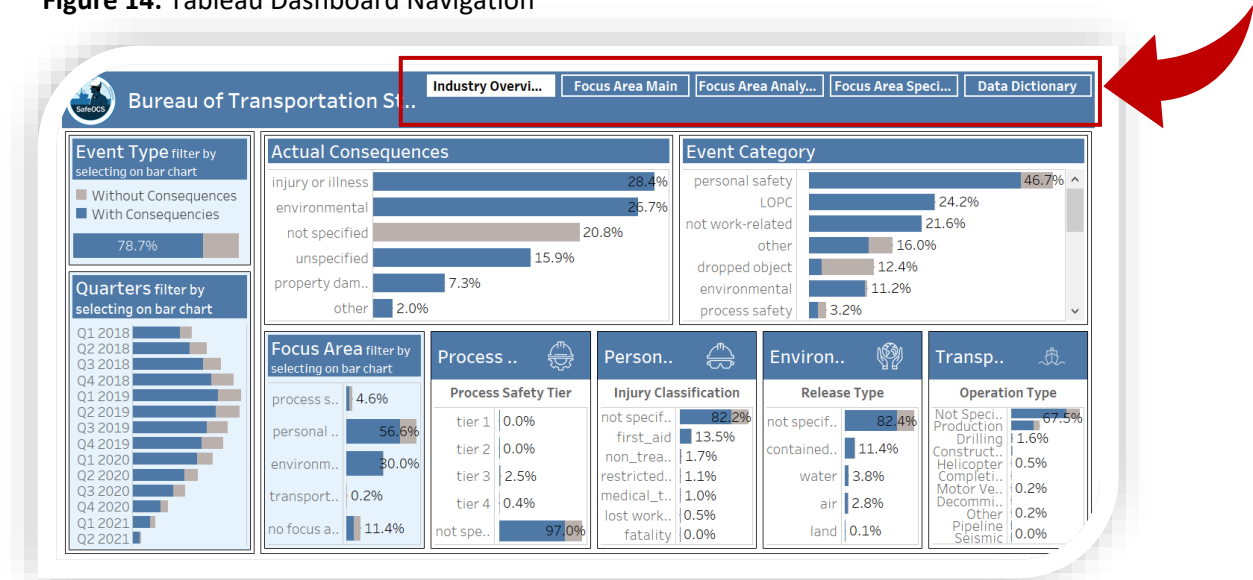
1. Open the *twbx* file using Tableau Reader.
2. Press  or F7 to show the dashboard in full screen.
3. The dashboard contains five selectable tabs at the top (**Figure 14**):
 - a. **Industry Overview**: this tab provides industrywide numbers at a glance.
 - b. **Focus Area Main**, **Focus Area Analytics**, and **Focus Area Specific** allow you to compare your company's event distribution to the industry average for various parameters.
 - c. **Data Dictionary**: this tab contains a definition of the dashboard variables, sub-variables, and their values.

Figure 14: Tableau Dashboard Navigation



STEP 3: EXPLORE DATA

1. Industry Overview

- The charts with a light blue background (Event Type, Quarters, and Focus Area) allow you to further filter data by clicking on the bars or labels. Filtering will affect the data shown throughout the Industry Overview page.
- To select multiple filters, hold the [Ctrl] key. For example, to select Q1 2020 and Q4 2020, click Q1 2020, then hold the control key and click Q4 2020.
- Under Causal Factors, the sparkline (trend line) shows how the distribution changes each quarter. As you slide along the line from left to right, you will see the applicable quarter noted in the tooltip. Note that if you have filtered to specific quarters, only those quarters will be shown in the sparklines.
- To clear filters on this page, press [Esc]. If you are in full screen mode, press [Esc] twice.

2. Focus Area Main

- From the menus on the left, you can select a time frame, event type, and focus area.
- At bottom left, under *Include Your Company in All ISD Data*, you can opt to include or exclude your company data from the aggregate *All ISD Data* (the left-hand side of the butterfly chart) for comparison.

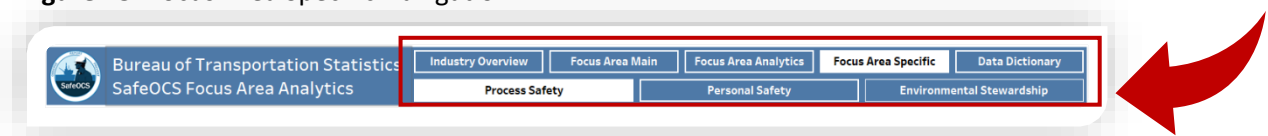
3. Focus Area Analytics

- From the menu on the left, you can select a time frame, event type, focus area, primary axis, and secondary axis.
- At bottom left, under *Include Your Company in All ISD Data*, you can opt to include or exclude your company data from the aggregate *All ISD Data* (the left-hand side of the butterfly chart) for comparison.
- Secondary Axis* functionality: When you select a secondary axis variable, it is displayed in a hover-over. The main butterfly chart will not change.

4. Focus Area Specific


- This tab allows you to select three additional views: Process Safety, Personal Safety, and Environmental Stewardship (**Figure 15**).

Figure 15: Focus Area Specific Navigation



- All views allow you to select a time frame and event type.
- For all views, at bottom left, under *Include Your Company in All ISD Data*, you can opt to include or exclude your company data from the aggregate *All ISD Data* (the left-hand side of the butterfly chart) for comparison.
- For the *Personal Safety* view, you can select a secondary axis variable. When you select a secondary axis variable, it is displayed in a hover-over. The main butterfly chart will not change.

5. Data Dictionary

- To view the value and subvalue definitions, hover over the  icon.
- Definitions for all variables and values are also provided in the [VariableList.xlsx](#) file.

STEP 4: PRINT DATA

1. **To print the dashboard to PDF:**
 - a. Select the *File* menu and *Print to PDF*.
 - b. Choose *Print Range* = Entire workbook.
 - c. Choose *Paper Size* = Landscape.
 - d. Click *OK*.
2. **To export the dashboard views to a PowerPoint file:**
 - a. Select the *File* menu and *Export As PowerPoint*.
 - b. Choose *Include* = Specific sheets from this workbook. Select only the first 8 sheets.
 - c. Click *Export*.
3. **To print a hover-over chart:**
 - a. Place your cursor on the bar so you can see the hover-over chart that you want to print.
 - b. Press *Windows logo key + Shift + S*. The desktop will darken while you select an area for your screenshot.
 - c. Click and drag to draw a rectangle around the hover-over chart with your mouse.
 - d. This takes a screenshot that is automatically copied to your clipboard. You can paste the image in a Word document and print it.

DASHBOARD NAVIGATION TIPS

- **How do I reset the view?**

Press the [Esc] key. This should reset the dashboard to the default view, although it will not change any of the options you have selected for the left-hand filter items. If you are in full screen mode, press [Esc] twice. Another way to reset the view is to exit Tableau Reader and reopen the file.