SAFE OCS PROGRAM
Industry Safety Data (ISD)

User Guide
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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
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

   From: SafeOCS
   Sent: Friday, May 25, 2018 8:04 PM
   To: User registered email address
   Subject: SafeOCS System User Account Activation

   Dear User,
   Please select the following link to validate your email address for your SafeOCS account:
   Validate E-Mail Address

   Once your email address is validated, your account will be activated and you can login to your account and start to submit data and information to SafeOCS.

   Thank you,
   The SafeOCS Team
   SafeOCS@dol.gov
   1-844-OCS-FRST (1-844-627-3778)

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**

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**
**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*
**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**

![Select a File to Upload](image-url)
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

   ![Start File Upload](image)

   **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

   ![Finalize File Upload](image)
**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*
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

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 `Ctrl` 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**
   a. 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.
   b. 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.
   c. 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.
   d. To clear filters on this page, press [Esc]. If you are in full screen mode, press [Esc] twice.

2. **Focus Area Main**
   a. From the menus on the left, you can select a time frame, event type, and focus area.
   b. 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**
   a. From the menu on the left, you can select a time frame, event type, focus area, primary axis, and secondary axis.
   b. 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.
   c. *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**
   a. This tab allows you to select three additional views: Process Safety, Personal Safety, and Environmental Stewardship (*Figure 15*).
   b. All views allow you to select a time frame and event type.
   c. 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.
   d. 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**
   a. To view the value and subvalue definitions, hover over the icon.
   b. 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.