ecoPortal®

Health and Safety, Risk Management Software

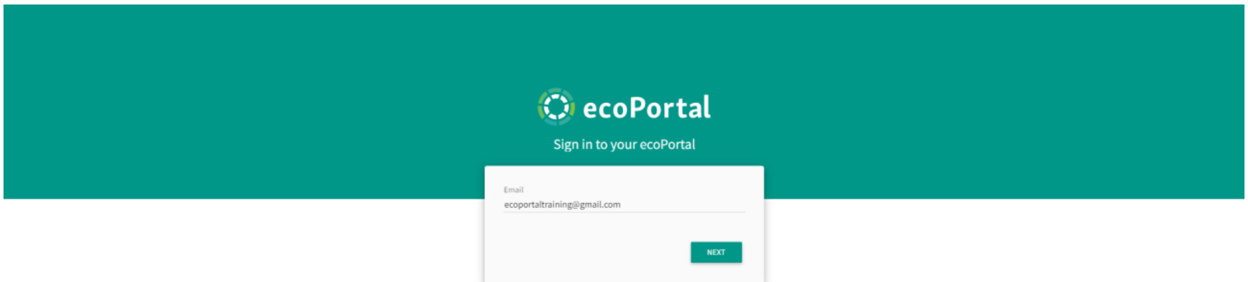
safetree

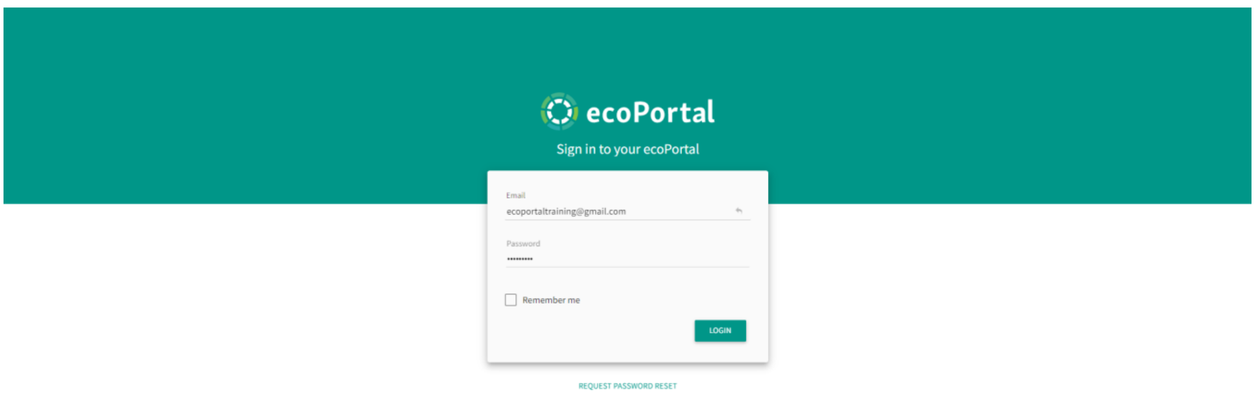
Submitting a Field Audit Request

Introduction.

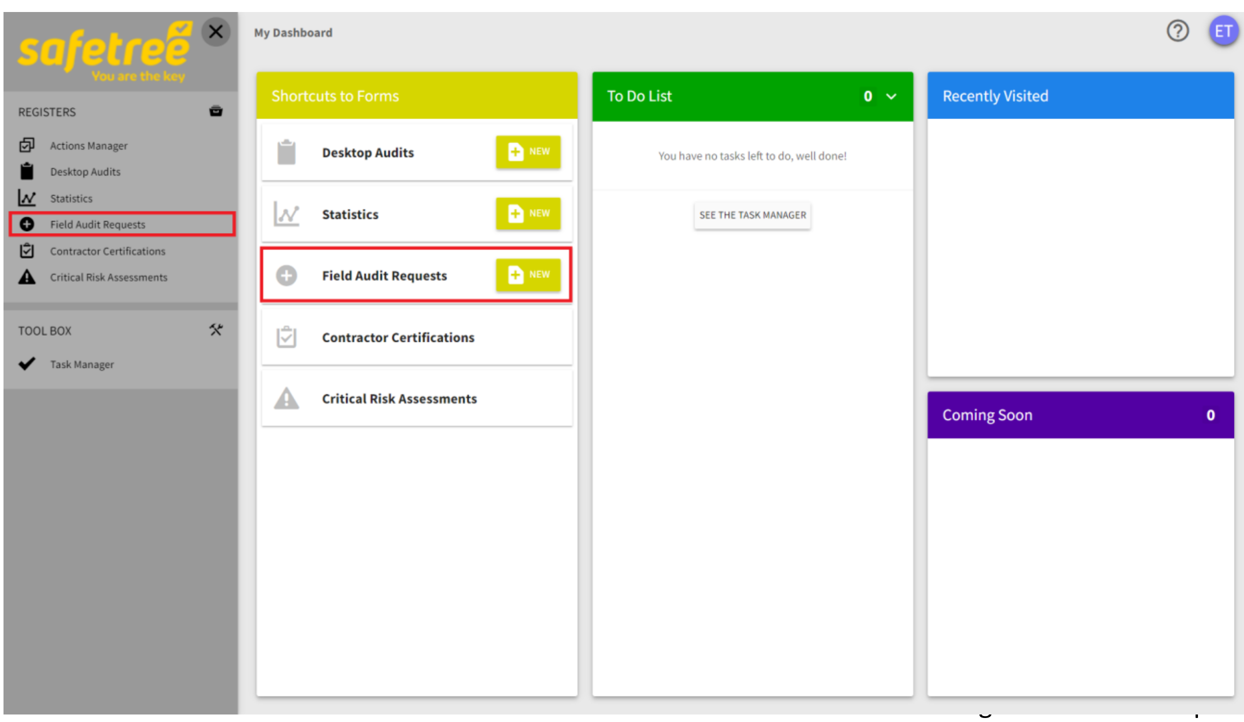
Access & Getting Started.

Access to **Safetree** is provided via the **Contractor or Worker Safetree Login request**. Once that is active then you will need to access Safetree and the Desktop Audits register via the main login point https://live.ecoportal.com/users/sign_in.





Once signed in, you will land on your **My Dashboard** page, from where you will be able to access the **FIELD AUDIT REQUESTS** register:

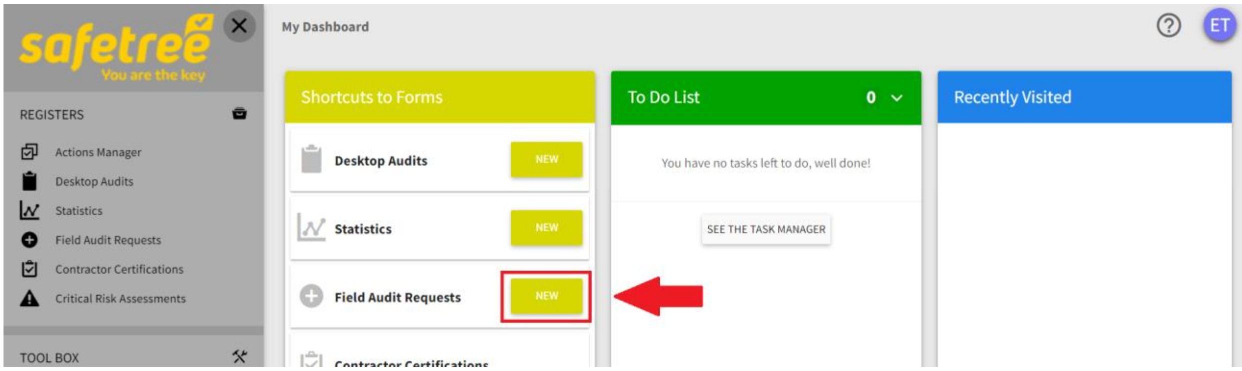


Accessing the FIeld Audit Request tool in Safetree.

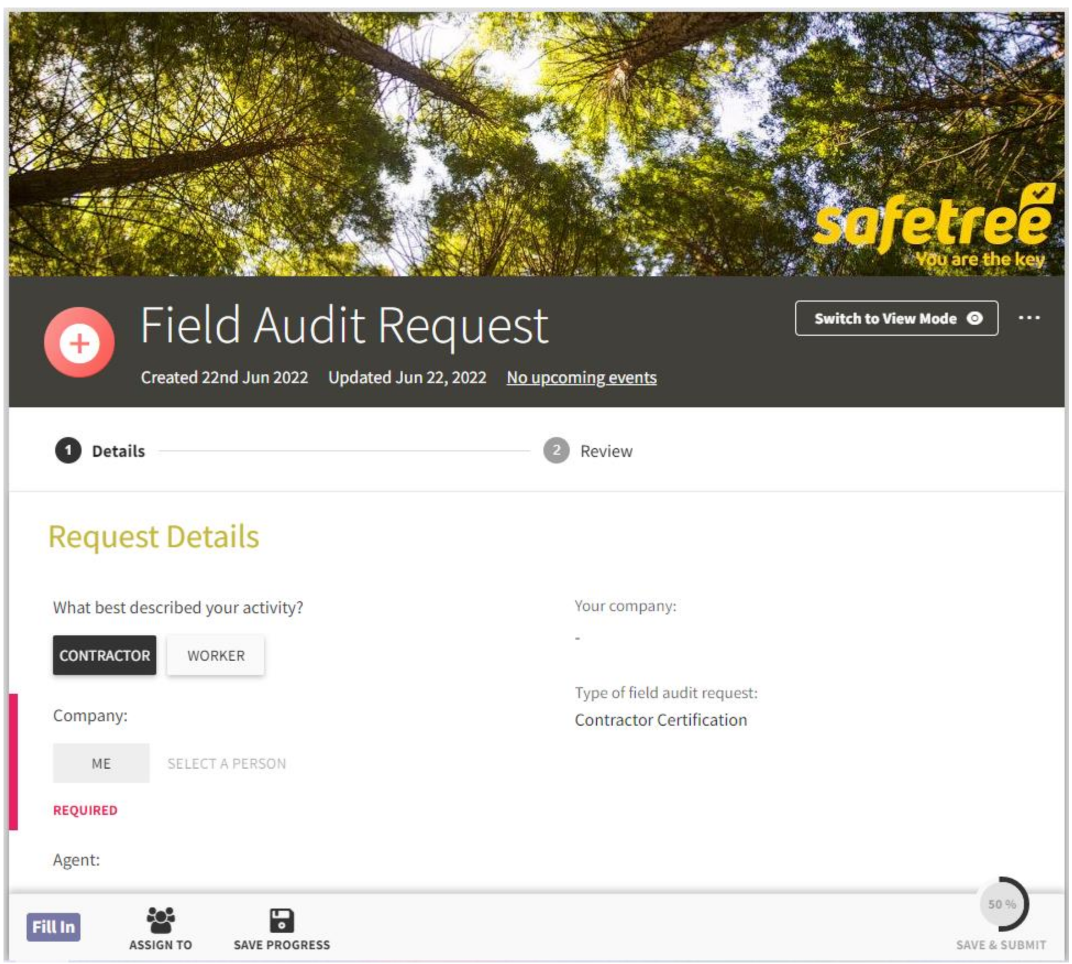
There are two ways that you can access the Field Audit Request tool in Safetree:

1. Via **My Dashboard** and the **Shortcuts to Forms** column **NEW** button.

Simply click on the  button within the **Shortcuts to Forms** column that looks like this:

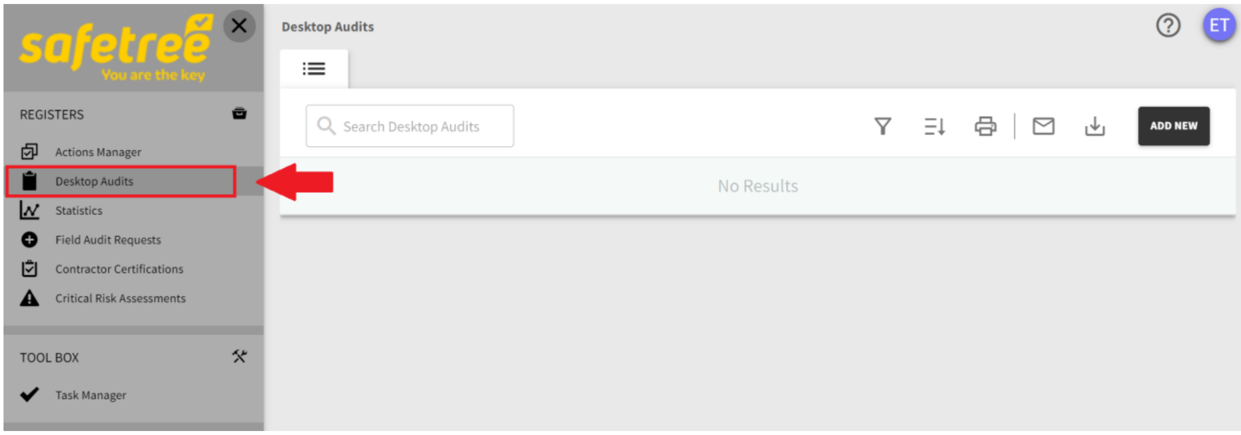


And you will be taken directly into the **Field Audit Request** form where you can begin logging your request.

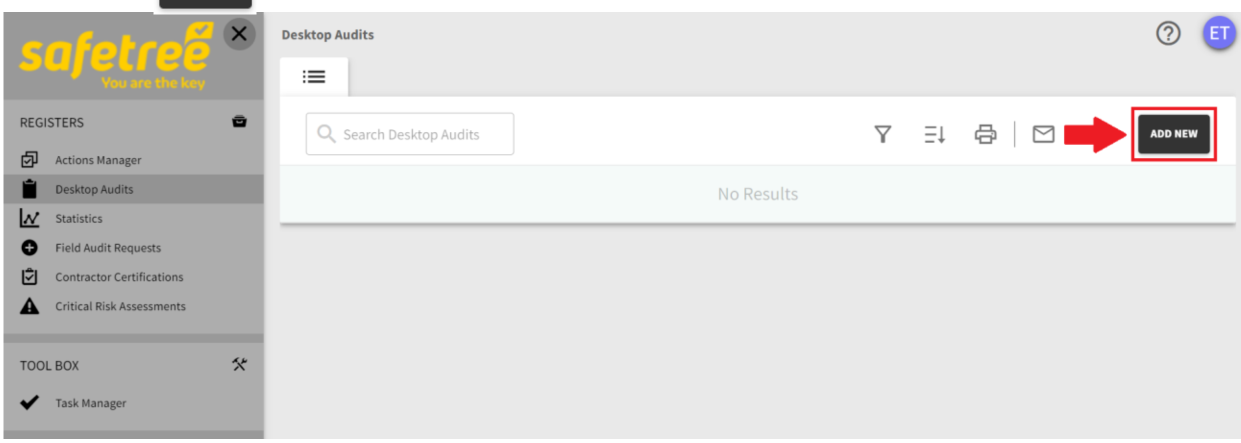


2. Via the **Register Sidebar** and the **ADD NEW** button within the register.

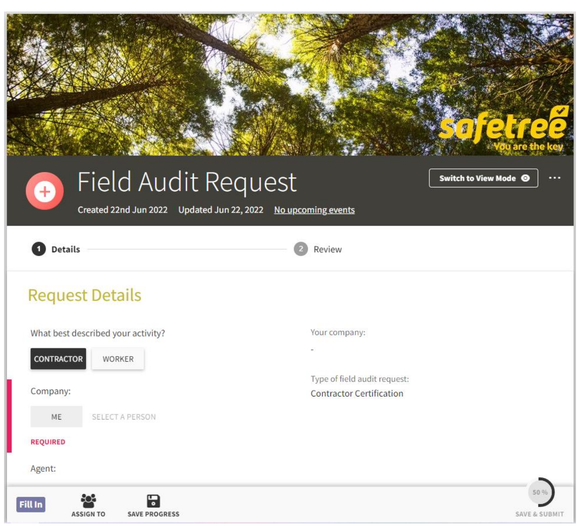
To access via this mode, click **Field Audit Requests** on the left-hand sidebar.



Then select **ADD NEW** to the right of your screen.



And you will be taken directly into the **Field Audit Request** form where you can begin logging your request.

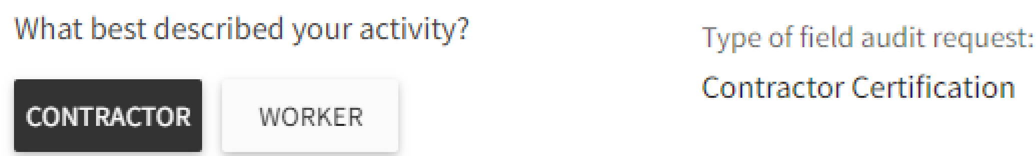


1. Logging a Field Audit Request.

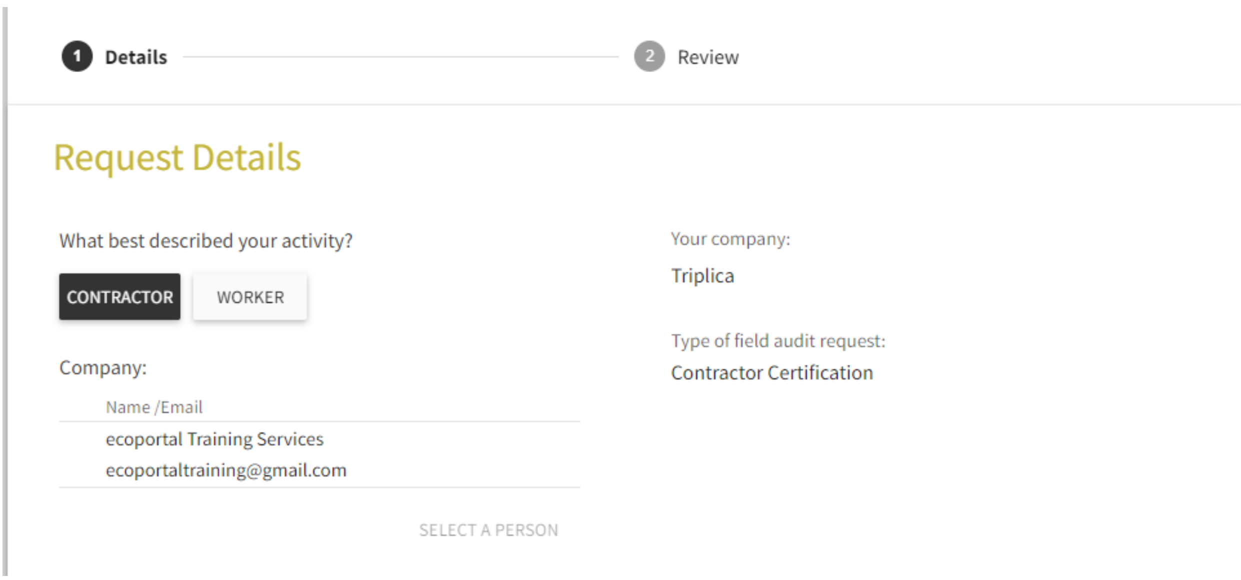
Once you land within the **Details** stage of the **FIeld Audit Request** workflow, you can fill out the **Request Details** section.

There is only one field you need to complete, with the remainder being automated.

The fields **What best described your activity?** and **Type of field audit request:** are automatically populated from the information provided when you requested a login:



Select **ME** in the **Company:** field, which will also populate the **Your company:** field.



Add any additional notes into the **Notes for Safetree** field and then you can **SAVE & SUBMIT** the request, which will then be assigned to a member of the FISC team to review and assign to an Auditor.