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# INTRODUCTION & SETUP

V e r s i o n    8.1

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# Program Compatibility





# SAFE™ Compatibility

SAFE is compatible on the following systems:

- Windows 98/ME/XP/Vista

SAFE Microsoft Access Version will work properly on:

- Microsoft Office Access XP/2003/2007
- SAFE also interacts with Excel, Word, and Outlook



# SAFE™ In-compatibility

SAFE is not-compatible on the following systems:

- Windows 95® and is not recommended for Windows ME® - Time to



SAFE Microsoft Access Version will not work properly on:

- Microsoft Office 95/97/2000 – Use the Runtime (Standalone Version)

- SAFE will not install on APPLE/Macintosh computers

*Let us know if you have the Dual Platform for Apple/Windows*



# Proper Installation





## Installation Instructions for Windows Vista Standalone & Microsoft Office Versions

### Standalone Version: (Those of you who do NOT have Microsoft Access XP, 2003, or 2007 installed)



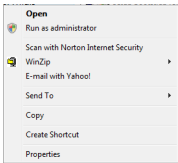
1. Insert the disk, click on "Open Folder to View Files", Right click on the file called "Setup.exe", left click on "Run as Administrator"
2. Go through the steps to setup and install the program.
3. After setup is completed successfully, left click on the Start Icon, left click on "All Programs" and left click on the folder called "SAFE". Right click on the picture of the key that is labeled "SAFE" and left click on "Send to" then left click on "Desktop (create shortcut)"

### Microsoft Access Version: (Compatible with Access XP, 2003, 2007 versions)

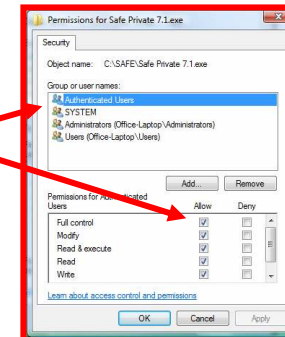
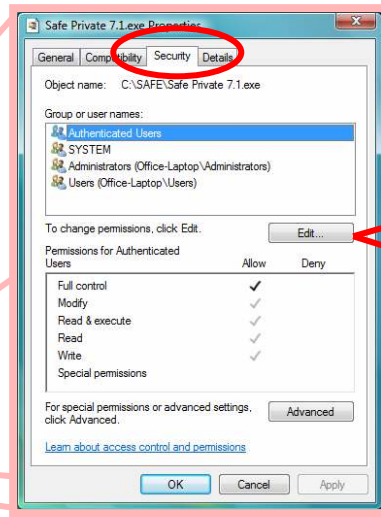
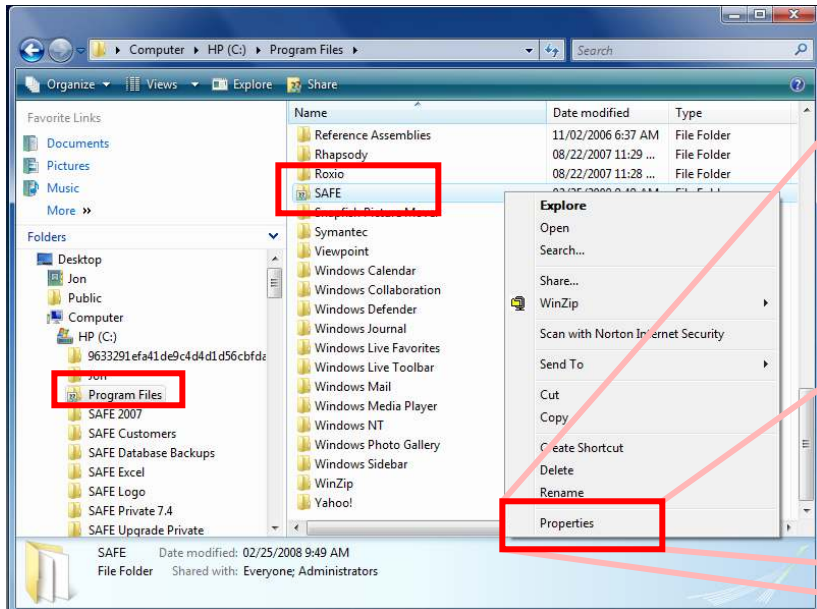


1. Insert the disk, click on "Open Folder to View Files", right click on the file called "SAFE Private 8.exe", and left click on "Run as Administrator".
2. Click on "OK", then "UNZIP" and "OK" when finished.
3. After setup is completed successfully, right click on the Start Icon, left click on the "C" directory, and find the "Program Files". Left click on "Program Files" and find the folder called "SAFE". Double click on the "SAFE" folder and then right click on the picture of the blue box with the "S" in the middle that is labeled "SAFE" and is a shortcut. Left click on "Send to" then left click on "Desktop (create shortcut)". Now you have the Access Version shortcut icon on your desktop.
4. **Microsoft Office 2003 and 2007 Macro Warning:** Turn off Security warning for Microsoft Office 03 by following these procedures: Go to Tools from the Access Menu, Click on Macro then Security, Set the security level to LOW

It is important to set your Permissions to "FULL CONTROL" on the SAFE Program.



- After setup is completed successfully, right click on the Start Icon, left click on the "C" directory, and find the "Program Files". Left click on "Program Files" and find the folder called "SAFE".
- Right click on "Properties" and left click "Security"
- Left Click "Edit" then select a User Name and make sure that "FULL CONTROL" is checked. If you change it, remember to click "Apply" before exiting the menu.
- After completing this, you will be given "Administrator" access.



Make sure FULL CONTROL is selected for each Group or User Name Selected

Also, make sure you click "APPLY" before exiting!

# Proper Installation Procedures



Non-Vista Operating Systems  
(Windows 98se, ME, 2000, XP)





## Standalone and Access Versions: Important Installation Settings

**IMPORTANT INSTALLATION INFORMATION:** Microsoft Access Versions. This is part of the Microsoft Office Professional Package containing; Excel, PowerPoint, Word, Outlook, Access, as well as others. Microsoft offers several versions of Office, but only Microsoft Office Professional contains Access. Microsoft Access is a database program with which our program is written. Find out what version you have by starting up Access, going to "Help", and selecting "About Microsoft Access." After you determine what version you have, simply install the CD into the CD drive. It is wise to install the Access Version if you have Microsoft Access XP, 03, or 2007. Our Access version will NOT run in Access 97 or 2000. The main advantages are that you can utilize many Toolbar Functions, export to Excel or Word, and view database information through queries you create.

### ACCESS VERSION INSTALLATION:

**SAFE WILL AUTO-RUN THE STAND-ALONE VERSION. SELECT "CANCEL SETUP."** *(You do not want to install the Stand-alone Version if you have Microsoft Access XP/03/2007)*

With your Mouse, **Right** Click on START then left click "EXPLORE"

Find the "CD Rom" drive and click on "SAFE Private" then double-click on "SAFE Private.exe"

Run the "Zipped" SAFE Program and say "OK" to the prompts

After "Unzipping" the SAFE program, click "ok" to finish.

**Microsoft Office 2003 and 2007 Macro Warning:** Turn off Security warning for Microsoft Office 03 by following these procedures:

- Go to Tools from the Access Menu
- Click on Macro then Security
- Set the security level to LOW

### STAND-ALONE VERSION INSTALLATION: Do this if you do NOT have Access XP/03 or 2007

Insert the CD-Rom. Follow these directions:

1.If your computer "Auto Runs" the SAFE stand-alone, then just follow the directions provided during set-up.

2.If your computer does not "Auto Run" the SAFE Program, do these steps:

Select "START" then "RUN"

Browse your Computer to find the CD drive. Select the appropriate drive letter.

Select "Setup.exe" and then click "Open" then "OK" - The program should begin Installation.

If you have any problems or errors, please contact me immediately by email at [vmsoft@aol.com](mailto:vmsoft@aol.com)

### **DISPLAY SETTINGS:**

SAFE is best viewed in 1024X768 or greater. To change this setting right-click your mouse on an empty area of your desktop display and select "Properties." Click on "Settings", then change the screen resolution to 1024X768 or greater and Click "Apply".

# Setting up the SAFE Shortcut



Microsoft Access XP, 03,07 Shortcut  
&  
Standalone (non-access) Shortcut



## Setting up the Access Version Shortcut AFTER installation is complete

### Installing the Desktop Icon: Access Version

1. Right click on "START", left click on "EXPLORE"
2. Left Click on the "C" Directory (this is your computer's hard drive)
3. Click on "Program Files"
4. Double click on the SAFE Folder
5. Right click on the shortcut icon called "SAFE" (blue box with the letter "S" in the middle)
6. Left click on "Send to" then "Desktop (create shortcut)"

SAFE Access Version Shortcut



Now you can open the Access version SAFE Program from your desktop

**1** Right Click Start, Left Click Explore

**2** Left Click your "C" Directory

**3** Double left click Program Files

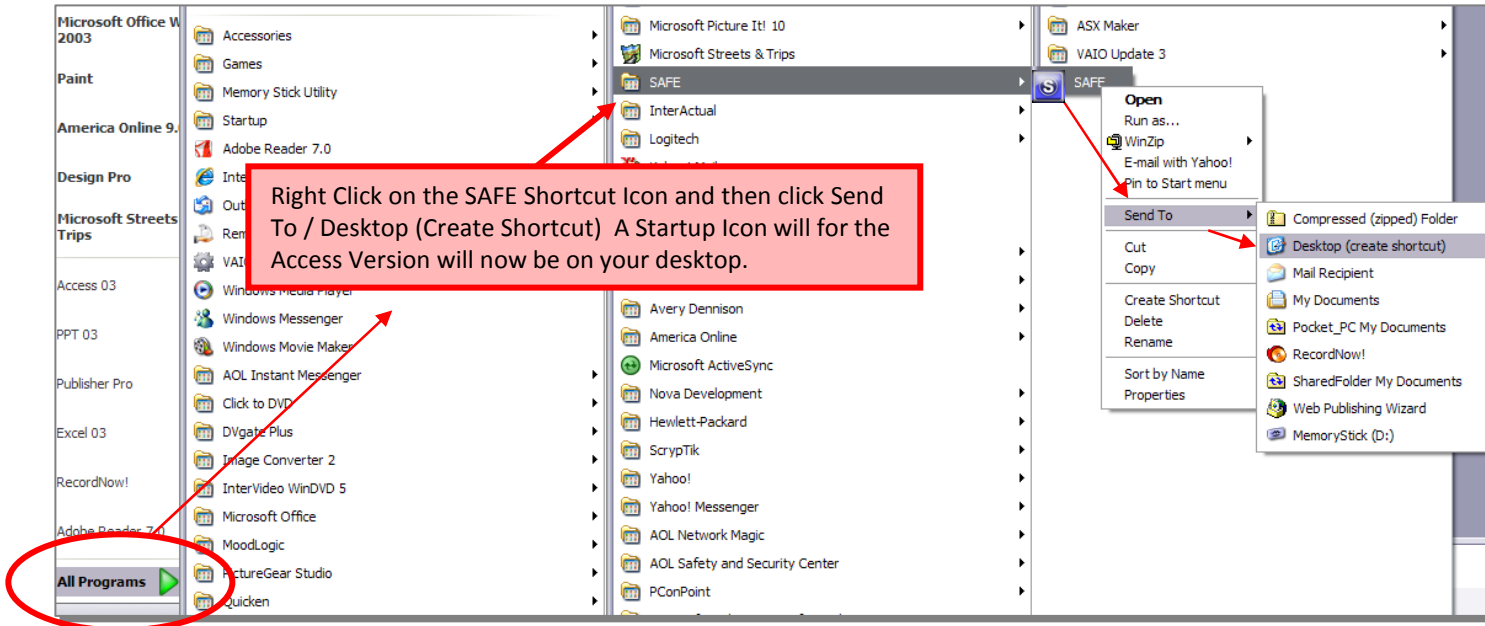
**4** Double left click the SAFE folder

**5** Right Click the shortcut named SAFE (not the icon file)

**6** Left Click "Send to", then left click "Desktop (create shortcut)"

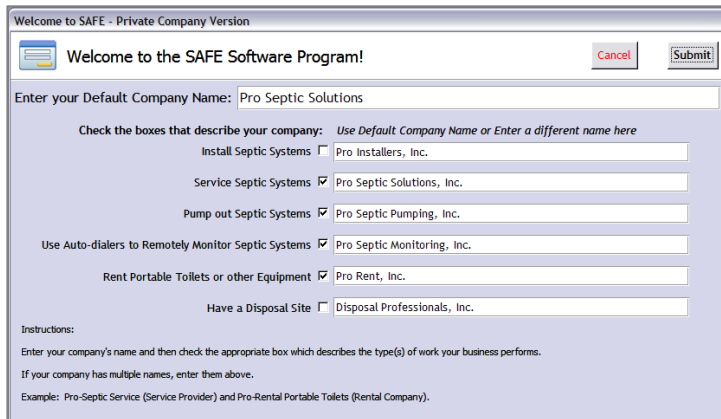
**Attention Windows 98, 2000, and ME users!!!**  
 If the shortcut appears clear with a white border on your desktop, please contact us. Often, this shortcut graphic does not show correctly on these operating systems.

## Setting up the Standalone (Non-Access) Shortcut Icon



Click on the Shortcut Icon and then enter your default Company Name. You can add more than one company if you separate your companies.

Click OK to the Trial Warning. If you purchased the software, you will be prompted to enter the codes in 6 days after installation.



# Transferring the SAFE Data



- Installing SAFE on a NEW Computer and then Transferring the data
- Installing SAFE on an Additional Computer and then Transferring the data

# Transferring your Data from one computer to another (Using a USB )



## One-time Transfer Method:

1. Install SAFE onto the NEW Computer (see the installation page for this procedure)
2. Insert the USB Device. Wait for it to Open a window and then select “Open Folder”
3. Open SAFE on the MAIN Computer and then go to the BACKUP Menu. Make sure that the “To:” field in the Backup Menu is correctly labeled to point to the USB drive (see example)
4. Click Backup and then “OK” when successful.
5. Take the USB Storage device out of the MAIN and insert it into the NEW computer
6. When the USB Drive menu appears, click “Open Folder to view files”
7. Right click on the “SAFE DB (date and time).mdb”, left click on RENAME and rename it to “SAFE DB” or “SAFE DB.mdb” if your computer is showing the extensions (.mdb). Do the same for the “SAFE Work (date and time).mdb”. Change it to “SAFE Work” or “SAFE Work.mdb”. Make sure you put a space between the “SAFE” and “DB” as well as the “SAFE” and “Work”.
8. After doing this, right click on the “SAFE DB” and then left click on “Copy”
9. Right click on the Start Button on the bottom left portion of your computer screen. Left click on Explore. Click on the “C” directory, then left click on “Program Files”. Right click on the folder called “SAFE” and then left click on “Paste”. Click “Copy and Replace” to finish putting your SAFE DB (Database) over the empty one. DO THE SAME THING TO THE “SAFE Work” FILE.
10. Start up SAFE and check to make sure your data is there.

**ATTENTION:** ACCESS databases will NOT MERGE together. If you work on two computers at the same time and then transfer a database from one computer to another, that database will overwrite the existing database on the computer it is being pasted to.

# Transferring your Data from one computer to another (Using a USB )



## Continual Transfer Method: To and from Computers

1. Make sure SAFE is installed on the NEW Computer (see the installation page for this procedure)
2. Insert the USB Device. Wait for it to Open a window and then select "Open Folder"
3. Open SAFE on the MAIN Computer and then go to the BACKUP Menu. Make sure that the "To:" field in the Backup Menu is correctly labeled to point to the USB drive (see example)
4. Click Backup and then "OK" when successful.
5. Take the USB Storage device out of the MAIN and insert it into the NEW computer
6. When the USB Drive menu appears, click "Open Folder to view files"
7. Right click on the "SAFE DB (date and time).mdb", left click on RENAME and rename it to "SAFE DB" or "SAFE DB.mdb" if your computer is showing the extensions (.mdb). Do the same for the "SAFE Work (date and time).mdb". Change it to "SAFE Work" or "SAFE Work.mdb". Make sure you put a space between the "SAFE" and "DB" as well as the "SAFE" and "Work".\*
8. After doing this, right click on the "SAFE DB" and then left click on "Copy"
9. Right click on the Start Button on the bottom left portion of your computer screen. Left click on Explore. Click on the "C" directory, then left click on "Program Files". Right click on the folder called "SAFE" and then left click on "Paste". Click "Copy and Replace" to finish putting your SAFE DB (Database) over the empty one. DO THE SAME THING TO THE "SAFE Work" FILE.
10. Start up SAFE and check to make sure your data is there.

\* After transferring the "SAFE Work" file to the new computer for the first time, you will not need to transfer it again.

**ATTENTION:** ACCESS databases will NOT MERGE together. If you work on two computers at the same time and then transfer a database from one computer to another, that database will overwrite the existing database on the computer it is being pasted to.

# MAIN MENU DEFAULT

## Detailed Main Menu



SAFE

TEST SAFE PROGRAM SOURCE 8

SAFE SOFTWARE  
Version 8.1 - Copyright 2008

Customers Work Orders Financials Vehicles Employees

July 2008

Today: 07/11/2008

Preview Delete

Master Files Networking  
License Info Backup Data

EXIT

Report Listings	Name- Double click	#	Street	City
A Car		31240	I H10 West	Boerne
Acevedo		21902	Paseo CRT	New Braunfels
ADKINS		740	SHADY HOLLOW	NEW BRAUNFELS
Aguilar		165	Ruices Ave	Fredericksburg
Albiter		110	monica lane Nunez	Stonewall
Albritton		225	County Road 3826	San Antonio
Allard		111	Forest Circle	Kerrville
Allen		1685	Obst Road	Bulverde
Almoussi		1463	Regu Road	Fredericksburg
Anderson		2034	Keese-Sagebiel	Fredericksburg
Anderson		8852	Rolling Acres Trail	Fair Oak
Arias		242	CR 3828	San Antonio
AYALA		2107	Keese-Sagebiel Rd	Fredericksburg
Bachleda		15423	Flying Circle	Helotes
Bachmeyer		113	Oak Meadows Lan	Boerne,
Barry		1903	RiverWay	Spring Branch
BATEMAN		21353	RR 2323	LLANO

## Main Menu – All New for V.8.1 “informative”

**Main Tab:** Shows reports, listings, spreadsheets of all your customers. The Customer menu consists of several subsections for each customer.

With Version 8 you can now change to different Company Names if you manage more than one company.

**Septic Inspections Tab:** View listings and Print Reports for Septic Inspections.

**Septic Contracts Tab:** View listings and print contracts, letters, and reports.

**Pumping/Cleaning Tab:** View listings and print pumping reports

**Rentals Tab:** Track portable toilets or any other type of rental equipment your company may offer. View Listings, and schedule service, etc.

**Spreadsheets/Transfer Tab:** Welcome to the 21st century! We want to help decrease the endless paper trail by allowing you to send and receive field inspections in a “Text” format to your MAIN computer, Manufacturer, or Regulatory Authority. The data will be automatically updated into their system if they are using our SAFE or CHES programs. Also, Import Inspection results from field computers that your technicians may be using.

### Main Menu Command Buttons:

**Customers:** Click this to go to the customer menu and enter or edit customer information.

**Work Orders:** Create, preview listings, and Print Work Orders.

**Financials (new for 8.1):** This is where the Invoices, Proposals, and the EXPENSE TRACKING are located. Expenses are NEW for version 8.1.

**Vehicles:** Keep track of all your equipment or vehicles here. Track all Vehicle work orders, fuel entry, licensing, and planned maintenance.

**Employees:** Enter employee information and set login and main menu view options.

**Master Files:** When you select this menu item, you are directed to the “heart” of your data. All pertinent information such as your company information, cities, counties, systems, other companies, inspectors, and much more are entered here. You can also change the verbiage of all your documents in this section.

**Network:** Re-link your data tables in order to network properly.

**License Information:** View your Company information.

**Backup:** Save your data quickly and easily.

Command Buttons

Tabs

Name	Double click	#	Street	City
A Car		31240	IH10 West	Boerne
Acevedo		21902	Passo CRT	New Braunfels
ADKINS		740	SHADY HOLLOW	FREDERICKSBURG
Aguilar		165	Ruices Ave	FREDERICKSBURG
Albiter		110	monica lane Nunez	Stonewall
Albritton		225	County Road 3826	San Antonio
Allard		111	Forest Circle	Kerrville
Allen		1685	Obst Road	Bulverde
Almouilli		1463	Regu Road	FREDERICKSBURG
Anderson		2034	Keese-Sagebiel	FREDERICKSBURG
Anderson		8852	Rolling Acres Trail	Fair Oak
Arias		242	CR 3826	San Antonio
AYALA		2107	Keese-Sagebiel Rd	FREDERICKSBURG
Bachleda		15423	Flying Circle	Helotes
Bachmeyer		113	Oak Meadows Lan	Boerne
Barry		1903	RiverWay	Spring Branch
BATEMAN		21353	RR 2323	LLANO

Calendar & License Information: Enter notes or reminders for any day of the month. Once created, you will be prompted to view that note on the day you created it.

Also, click the License Information to view your information and other detail about your SAFE Program.


This is the DEFAULT screen choice given to all employees when the program is installed.

# MAIN MENU OPTION 2

## Basic Main Menu



SAFE



Version: 8.1 - Copyright 2007  
Fred Denney

July 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 07/11/2008

TEST SAFE PROGRAM SOURCE 8

Customers	Work Orders	Quick-Views	Reports
Rentals	Disposal Sites	Vehicles	Invoices
Spreadsheets	Import Export	Employees	Proposals
Master Files	Network	Backup	Accounts Payable

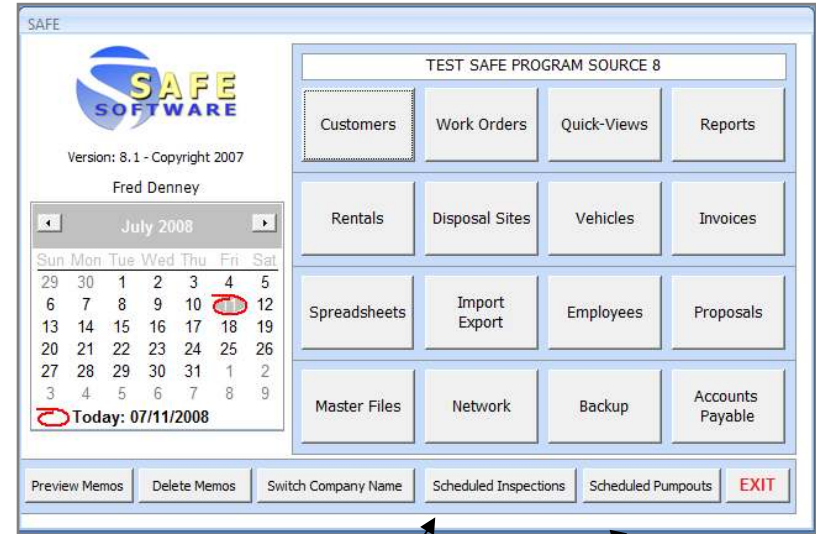
Preview Memos | Delete Memos | Switch Company Name | Scheduled Inspections | Scheduled Pumpouts | EXIT

## Basic Main Menu – “Simplicity”

This menu is similar to the ones in previous versions of the software.

It offers a more basic look to the software Main Menu

**Calendar:** Enter notes or reminders for any day of the month. Once created, you will be prompted to view that note on the day you created it.



**Fast Access:** Click either Scheduled Inspections or Scheduled Pumpouts to go to that menu quicker.

To use this screen, you must select in from the Employees/Main Menu Selections location. Choose the “Basic” menu. You will need to designate one or more employees with an Employee Type of “Admin”. A password is not necessary.

### Main Menu Command Buttons:

**Customer Menu:** Click this to go to the customer menu and enter or edit customer information.

**Work Orders:** View and enter Work Orders and Reports

**Quick-Views:** View listings for all areas of your company

**Reports:** Print, view, and create Reports

**Rentals:** Enter Rental Categories, Units, and view Reports

**Disposal Sites:** Enter Dumping Transactions and view Manifests

**Vehicles:** Enter Vehicles and track maintenance and fuel.

**Invoices:** Print out upcoming Invoices and other reports

**Spreadsheets:** Create Excel® Spreadsheets for your customers

**Import/Export:** Exchange data with your Agencies or field computers

**Employees:** Enter your employee information, set the default menu and track time

**Proposals:** Enter any proposals and print them out.

**Master Files:** The “Filing Cabinet” of your program. This is where you enter all of your commonly used data and set up your organization information and documents.

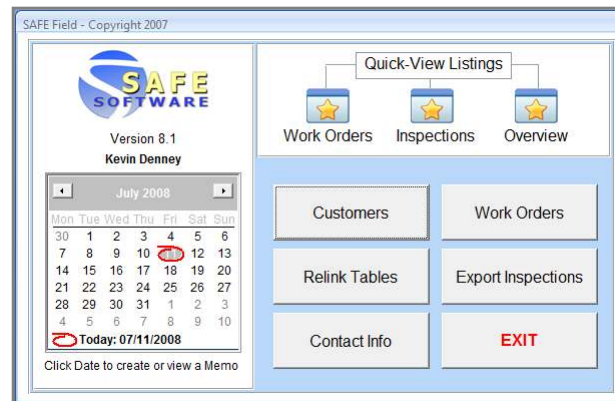
**Network:** Link the program to a central server and network.

**Backup:** Store your data and feel “Safe” that your information is secure

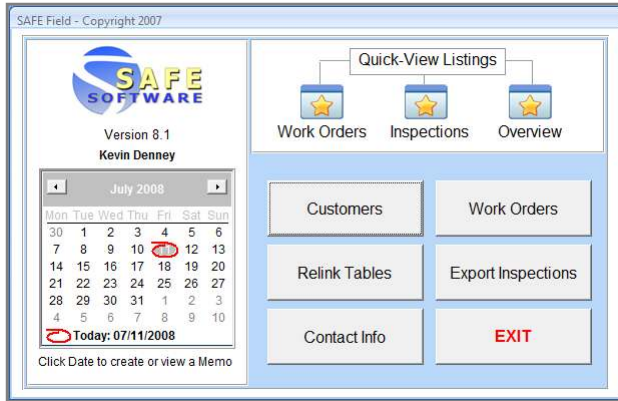
**Exit:** Bye, bye.

# MAIN MENU OPTION 3

## Field Service Menu



# M a i n M e n u O p t i o n s



## ← Field Service Main Menu

- “Stripped Down” version of the Basic Menu
- Designed for the Field Technician who enters Aerobic System Inspections ONLY
- Has very LIMITED Functions to ensure data accuracy

## Field Service Customers Menu

- Very Detailed ONE PAGE Menu
- Every field is locked. The field tech is only supposed to enter Inspection information and then create a file to EXPORT from the field computer. This information is then IMPORTED into the main computer.

**Customer / Owner**

Search:  Other Search

Reference No.:  Commercial System:  Multi-Hookup:

ID: 7 Permit: S6549 Permit Date: 02/15/2004

Jon Denney

**Physical Address**  
3221 Como Lake Rd. Denton TX 76210

**Mailing Address**  
3221 Como Lake Rd. Denton TX 76210 Home: (940) 367-2246 Cell: (878) 798-7987 Work: (940) 367-2246 Ext: 2

**Additional Information**  
Attention:  Legal Description:   
Email: vmsoft@aol.com Please speak to Jon Denney - He is the owneradfasd  
Lot: 1 Block:   
Subdivision: Alsatton Heights County: Kendall

**Septic Contract Information**  
Active Starts: 02/20/2008 Ends: 02/20/2009 Last Payment: 02/19/2008 Renewal Freq.: 12 Months  
Dedined Renewal on:  Sent to Agency on:   
Authorization:  Install Date: 02/15/2004 Warranty Expires: 01/01/2008

**Septic Inspections Information**  
Date Due: 05/20/2008 Per year: 3 Area: 1 Requires Chlorine?  We Add Chlorine?   
Stop #:  Map Key:  Brand: Solar Air  
Contract Fee: \$450.00 Add-on Charge + \$0.00 Total Contract Fee: \$450.00 Set an Override Fee: \$250.00  
GPS: 33.17562 -97.10164

**Directions/Instructions**  
Go to Windriver estates, turn right at the first light. Go a mile until you see the red roofed house. Turn left and then it is the 2nd house on the right. They have a grey pickup and a

Please speak to Jon Denney - He is the owner

Agency: Kendall County Development M Site-evaluator:  Treatment Type: Aerobic Without Chlorine Aeration: SA II N-500 GPD  
Agency #2:  Manufacturer: National Wastewater Systems, Disposal Type: Surface Application N-00028  
Agency #3:  Distributor: Alamo Aerobics & Wastewater Disinfectant:  Dischg:   
Designer:  Installer: WC Builders, LLC

Record: 1 of 682

To use this screen, you must select in from the Employees/Main Menu Selections location. Choose the “Field” menu. You will need to designate one or more employees with an Employee Type of “Admin”. A password is not necessary.

# Program Privacy & Optional Settings



Welcome to SAFE - please login.....

 Enter User ID and Password Cancel / Quit

User ID:

Password:

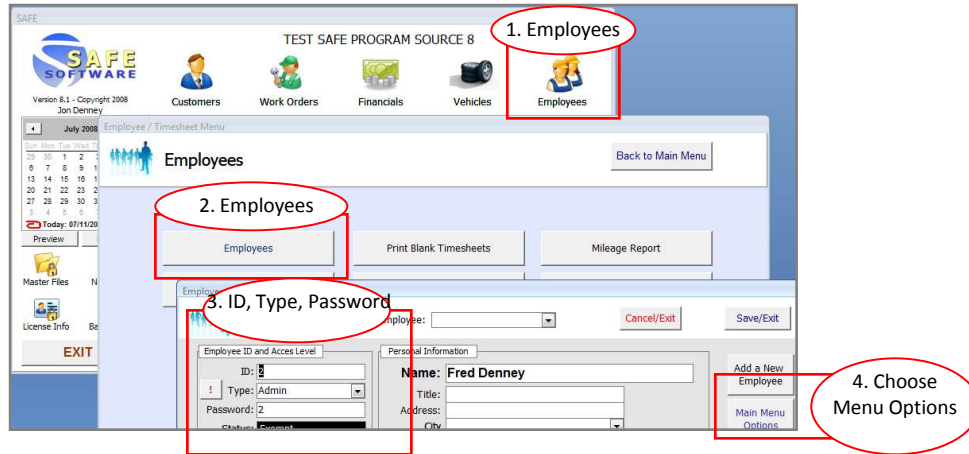
[Continue](#)

[Why am I being asked to login?](#)

[Forgot your User ID or Password?  
Click Here for Help](#)

## What to consider before adding security to the SAFE Program

**Overview:** For added security and menu restrictions, you can give each employee their own Password. Employees with the Type of "Other" cannot access many screens IF another employee has been given the Type of "Admin". You can assign each employee a User ID without a password, however, if one or more employees has been given the Type: "Admin", then you will be asked to login with a User ID and Password.



### Definitions of Employee Types:

**Admin:** This employee type lets you access all screens and forms.

*Assign this type to your employees if:*

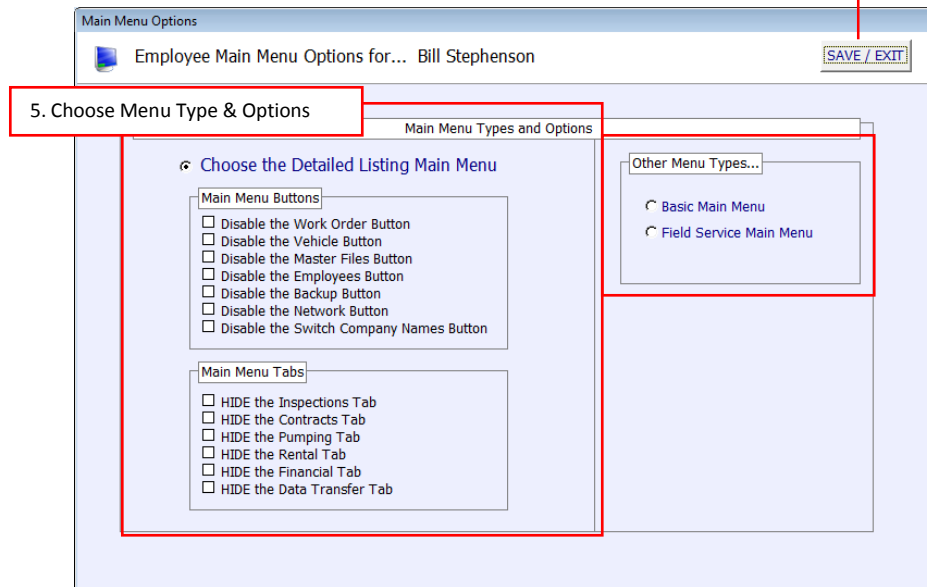
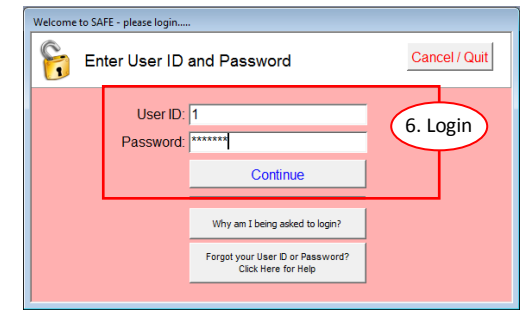
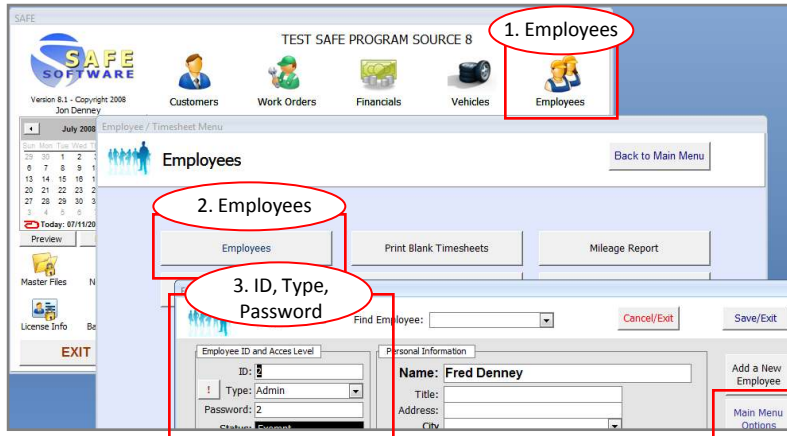
- You are the owner of your company and want to have access to all screens, menus, and documents BUT want to restrict other employees' access.
- You want to select different Main Menu Types for yourself and your employees.
- You want to hide or show certain tabs and buttons on the Main Menu for your different employees.
- You simply want to add more security to SAFE when opening the program. Make sure you assign passwords and remember those passwords!

**Other:** This employee type lets you access all screens and forms UNLESS another employee has been given the employee type of "Admin".

*Assign this type to your employees if:*

- You only have one person using SAFE and/or you do not care about security or menu restrictions.
- If you have entered another employee's type as "Admin" and wish to restrict this employee's access to screens and other functions.

## Restricting Menu Options, views, and accessibility for your employees



**MAIN MENU BUTTON AND TAB OPTIONS:** If you choose the Detailed Listing Menu, you can also choose to view, hide, or disable several buttons and tabs.

This takes the worry out of whether an employee can have access to certain menus like Master Files, Employees, and Financials.

To take effect, you must restart the program and login as that user.

# Memos and Reminder Messages



SAFE  
Version 8.1 - Copyright 2008

TEST SAFE PROGRAM SOURCE 8

Customers Work Orders Financials Vehicles Employees

Main . Inspections . Contracts . Pumping / Cleaning . Rentals . Spreadsheets

Report Listings  
Screen Listings  
Miscellaneous Reports  
Customer Graphs  
Customers to Contact  
Company Listings  
Click to Switch Company Names

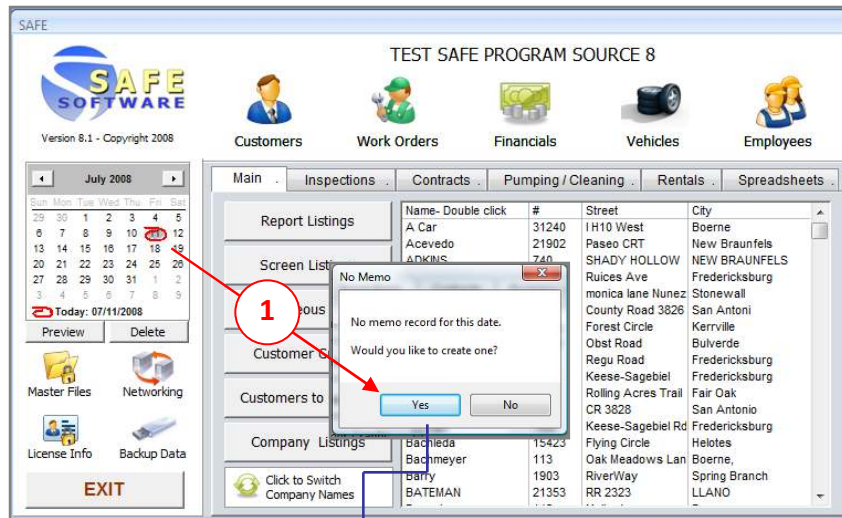
Name-Double click	#	Street	City
A Car	31240	1H10 West	Boerne
Acevedo	21902	Paseo CRT	New Braunfels
ADKINS	740	SHADY HOLLOW	NEW BRAUNFELS
Aguilar	165	Ruices Ave	Fredericksburg
Albiter	110	monica lane Nunez	Stonewall
Albritton	225	County Road 3826	San Antonio
Allard	111	Forest Circle	Kerrville
Allen	1685	Obst Road	Bulverde
Almousll	1463	Regu Road	Fredericksburg
Anderson	2034	Keese-Sagebiel	Fredericksburg
Anderson	6852	Rolling Acres Trail	Fair Oak
Arias	242	CR 3823	San Antonio
AYALA	2107	Keese-Sagebiel Rd	Fredericksburg
Bachleda	15423	Flying Circle	Helotes
Bachmeyer	113	Oak Meadows Lan	Boerne
Barry	1903	RiverWay	Spring Branch
BATEMAN	21353	RR 2323	LLANO

July 2008  
Sun Mon Tue Wed Thu Fri Sat  
25 30 1 2 3 4 5  
6 7 8 9 10 11 12  
13 14 15 16 17 18 19  
20 21 22 23 24 25 26  
27 28 29 30 31 1 2  
3 4 5 6 7 8 9  
Today: 07/11/2008  
Preview Delete

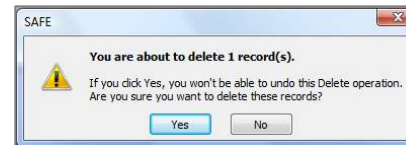
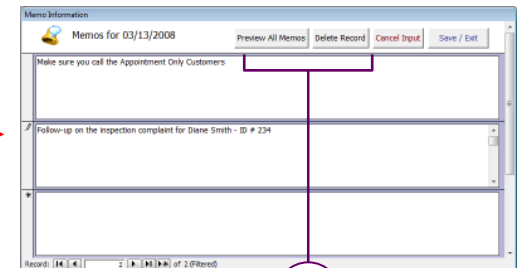
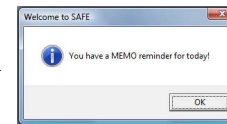
Master Files Networking  
License Info Backup Data  
EXIT

## Creating Memos and Reminders

1. Open SAFE and click on your desired date for a memo
2. Click "YES" to create a memo for that date
3. Enter the Memo or Reminder information
4. Click "SAVE/Exit"
5. When you open SAFE on that day, you will be prompted that you have a SAFE Memo for that day.
6. Click "OK" and view the memo
7. Delete the memo if desired
8. You can also Preview or Delete the memos from the Main Menu



5



4

