



D A M S T R A

Configuring Notifications & Escalations Safety



[DISCLAIMER]

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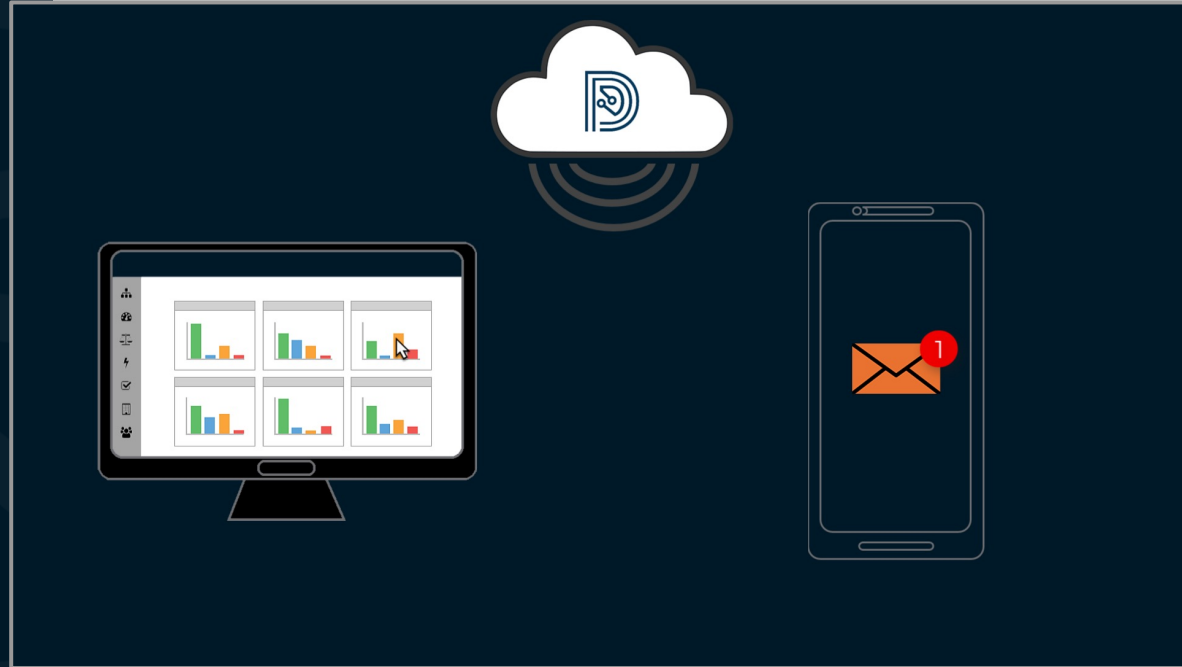
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Notifications / Escalations Introduction

In Damstra Safety, *Notifications* and *Escalations* are optional, configurable alerts that are sent to specified parties via email to alert them to new events or to remind them that an event or action is due or overdue.



Notifications / Escalations

Definitions

A *Notification* is instantly triggered by the creation of or update to an Incident or Hazard or other event, e.g. an Injury is reported via a webform, or an existing Event is updated to record that hospitalisation was required.

Escalations are delivered daily at a defined time and are triggered when dates or statuses of items within your Damstra Safety system match selected criteria, e.g. an employee's licence expires, or maintenance for a Plant item becomes overdue.

Notifications

Escalations

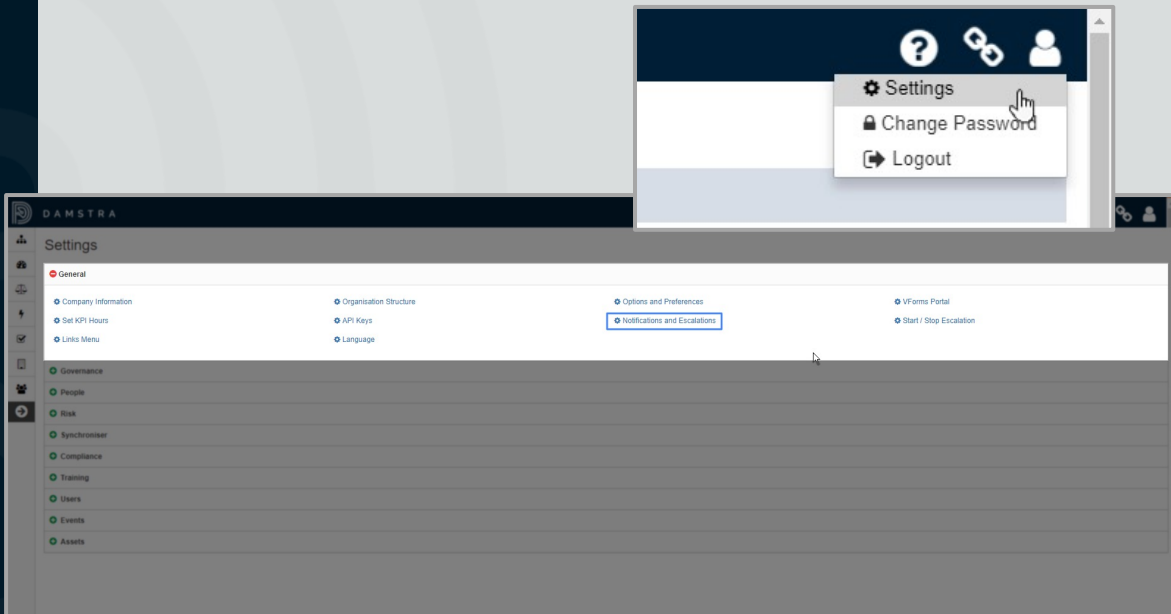
⬇	Instantly triggered	Delivered daily at a defined time
?	Incident, hazard or other event submitted or updated	Dates / statuses of items match selected criteria
e.g.	Injury reported Event updated	Licence expires Plant maintenance overdue

Notifications / Escalations

Accessing Notifications and Escalations Settings

The procedure begins in Settings which can be found under the *profile* icon toward the top of the screen.

Within the *General* section, locate and **click** on '*Notifications and Escalations*'.



Notifications / Escalations

Display / Configuration Methods

Alerts are displayed and configured in two ways:

'*By Group*' allows you to define a group of people (for example, managers or executives) and then select the alerts that the group should receive

'*By Notification / Escalation*' allows you to select a trigger and then select the groups that should receive the corresponding alerts

The screenshot shows the DAMSTRA web interface for configuring notifications and escalations. The page title is "Settings / Notifications and Escalations". A blue banner at the top indicates the "Current Escalation Setup" with a scheduled time of 9 a.m. AEST. Below this, there are three tabs: "By Group", "By Notification / Escalation", and "Company (Targeted)". The "By Notification / Escalation" tab is active. The interface is divided into two main sections: "My Filters" and "Filters". The "My Filters" section shows "No filter saved." and a search bar. The "Filters" section has a checked checkbox for "View Active Group" and a search bar. Below the search bar, there is a "Show 15 entries" dropdown and "Apply" and "Clear" buttons. A "Save this filter" section is also present with a "Filter Name" input field and a "Save" button. On the right side, a table displays a list of filters:

ID	Name
3289	Health & Safety - Initial Response Team
3288	Exec Team - Critical Response
3273	High Risk Management - Adelaide

At the bottom of the table, it says "Showing 1 to 3 of 3 entries".

Notifications / Escalations

Add Group

Provide a Name for the *Group* being added.

Leave the '*Group Active*' checkbox ticked to enable alerts, or untick it if you wish to suspend alerts for the group.

In the *Region / Site* field, select the *Site(s)* that the group should receive alerts for, by using the tick-boxes. To receive alerts for all *Sites*, **select** the global level.

The screenshot shows the 'Settings / Notifications and Escalations' interface in the DAMSTRA system. The page is titled 'Settings / Notifications and Escalations' and includes a 'Current Escalation Setup' section indicating a scheduled time of 9 a.m. AEST. The main configuration area is divided into several sections: 'By Group' (selected), 'By Notification / Escalation', and 'Company (Targeted)'. The 'Group Name' field is populated with 'People Management Team'. The 'Group Active' checkbox is checked. The 'Region/Site' field is populated with 'ABC Group', which is expanded to show a tree view of the organization's structure. The tree view includes 'ABC Group' (selected), 'ABC Industries Australia', 'New South Wales', 'Sydney', 'Finance', 'New Forest', 'Sydney Accounting', 'Sydney Payroll', 'Plant', 'Sydney Warehouse', 'Rydalmere Plant', and 'Dispatch'. The 'People In Group' section is currently empty. The 'Triggers for Groups' section is also empty. At the bottom of the page, there is a 'Save' button and a 'Cancel' button. A 'Help' button is located in the bottom right corner.

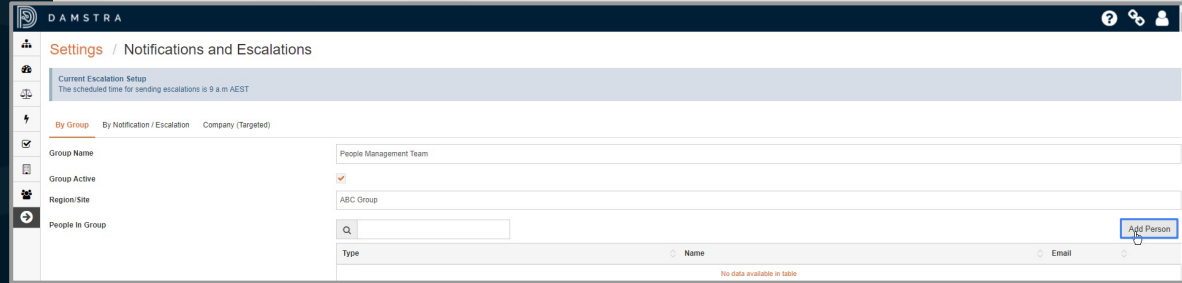
Notifications / Escalations

Add Group cont.

To add people to the group, **click** 'Add Person'.

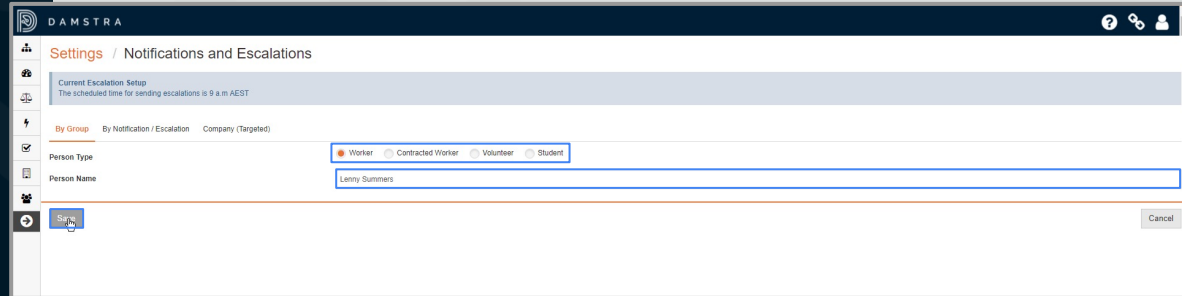
Select the *Person Type* for the person being added, and begin **typing** their name. Smart Search will help locate the right person as you begin to type.

Once the right person is located, **click** 'Save'.



The screenshot shows the 'Add Person' dialog box in the DAMSTRA system. The dialog is titled 'Settings / Notifications and Escalations' and contains the following fields and options:

- Current Escalation Setup:** The scheduled time for sending escalations is 9 a.m. AEST.
- By Group:** Selected. Other options are 'By Notification / Escalation' and 'Company (Targeted)'.
- Group Name:** People Management Team
- Group Active:**
- Region/Site:** ABC Group
- People In Group:** A search bar with a magnifying glass icon and a table below it. The table is currently empty, with a red message 'No data available in table' at the bottom.
- Buttons:** 'Add Person' (highlighted with a blue box) and 'Cancel'.



The screenshot shows the 'Add Person' dialog box with the 'Person Type' and 'Person Name' fields filled. The dialog is titled 'Settings / Notifications and Escalations' and contains the following fields and options:

- Person Type:** Worker (selected), Contracted Worker, Volunteer, Student
- Person Name:** Lenry Summers
- Buttons:** 'Save' (highlighted with a blue box) and 'Cancel'.

Notifications / Escalations

Add Group cont.

The person has now been added to the *Group*.

Ensure that a green tick appears in the *Email* column for the person added. This indicates that an email address is on-file for this person, and that they will therefore be able to receive the notification.

If a red cross is displayed, ensure that the person's *Worker* record is updated with a valid email address.

Updating the worker record email info automatically updates the notification.

The screenshot displays the DAMSTRA web application interface for 'Settings / Notifications and Escalations'. A green success message at the top right states 'Success Record saved successfully!'. The main content area is divided into sections: 'Current Escalation Setup' (showing a scheduled time of 9 a.m. AEST), 'By Group' (selected), 'By Notification / Escalation', and 'Company (Targeted)'. The 'People In Group' section features a search bar and a table with columns for 'Type', 'Name', and 'Email'. The table contains one entry: 'Worker' for 'Lenny Summers', with a green checkmark in the 'Email' column. Below this is a 'Triggers for Groups' section with another search bar and a table that currently shows 'No data available in table'. At the bottom, there are 'Save' and 'Cancel' buttons, and a 'Help' button in the bottom right corner.

Notifications / Escalations

Add Trigger

Repeat this procedure for any additional People you'd like to add to the Group.

Next, to select the type of alert(s) that the group should receive, **click 'Add Trigger'**.

The screenshot displays the 'Settings / Notifications and Escalations' page in the DAMSTRA system. The page is titled 'Settings / Notifications and Escalations' and shows the configuration for a group named 'People Management Team'. The 'Current Escalation Setup' section indicates that the scheduled time for sending escalations is 9 a.m. AEST. The 'By Group' tab is selected, showing the group name, active status, and region/site. Below this, there are two tables for managing triggers. The first table, 'People In Group', lists two workers: Martin Daniels and Lenny Summers, both with green checkmarks in the 'Email' column. The second table, 'Triggers for Groups', is currently empty, showing 'No data available in table'. A blue box highlights the 'Add Trigger' button in the top right corner of the second table. The interface also features a 'Save' button at the bottom left and a 'Cancel' button at the bottom right.

Notifications / Escalations

Add Trigger cont.

Select the *Type* of alert being added - that is, Notification or Escalation.

Then, **select** the *Trigger type*.

Once selected, choose one or more specific triggers from the dropdown, using the checkboxes.

DAMSTRA

Settings / Notifications and Escalations

Current Escalation Setup
The scheduled time for sending escalations is 9 a.m. AEST

By Group | By Notification / Escalation | Company (Targeted)

Type: Notification Escalation

Trigger Type: Training

Trigger: Contractor Training Expiring

Timing: Contractor Training Expiring Employee Training Expiring

Reoccurring

Save Cancel

Help

Notifications / Escalations

Add Trigger cont.

Where an Escalation has been chosen, **select** the *Timing* for the trigger. The available options are:

- *On Due Date*, in which case the alert will be triggered on the day the item is due
- *Due in*, whereby the number of days before the item is due can be selected, e.g. when the item is due 10 days from now
- *Expired for*, whereby the number of days since expiry can be selected, e.g. when the item expired 5 days ago

The screenshot displays the 'Settings / Notifications and Escalations' interface in the DAMSTRA system. The page title is 'Settings / Notifications and Escalations'. Below the title, there is a section for 'Current Escalation Setup' with a note: 'The scheduled time for sending escalations is 9 a.m. AEST'. The main configuration area is divided into sections: 'By Group' (with sub-sections for 'By Notification / Escalation' and 'Company (Targeted)'), 'Type' (with radio buttons for 'Notification' and 'Escalation'), 'Trigger Type' (set to 'Training'), 'Trigger' (set to 'All selected (2)'), and 'Timing' (set to 'Due in' with a value of '10'). There is also a 'Reoccurring' checkbox which is unchecked. At the bottom left, there is an orange 'Save' button, and at the bottom right, there is a grey 'Cancel' button and a blue 'Help' button.

Notifications / Escalations

Add Trigger cont.

Tick the *'Recurring'* check-box if you'd like to repeat the escalation.

Select the interval for the recurrence in days.

The Escalation will be repeated until an update to the item cancels the trigger, e.g. it is no longer overdue.

Once the trigger has been defined, **click 'Save'** and repeat the procedure for any additional triggers you would like to set up for this group.

The screenshot shows the 'Settings / Notifications and Escalations' configuration page in the DAMSTRA system. The page is titled 'Settings / Notifications and Escalations' and includes a sub-section for 'Current Escalation Setup' with the note 'The scheduled time for sending escalations is 9 a.m. AEST'. Below this, there are tabs for 'By Group', 'By Notification / Escalation', and 'Company (Targeted)'. The 'By Group' tab is active. The configuration is divided into several sections: 'Type' (with radio buttons for 'Notification' and 'Escalation'), 'Trigger Type' (set to 'Training'), 'Trigger' (set to 'All selected (2)'), and 'Timing' (set to 'Expired For' with a value of '5'). The 'Recurring' checkbox is checked, and the interval is set to '2 Days'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. A 'Help' button is located in the bottom right corner of the page.

Notifications / Escalations

Add Trigger cont.

Once all selections have been made,
click 'Save'.

The screenshot displays the 'Settings / Notifications and Escalations' page in the DAMSTRA system. The page is divided into several sections:

- Current Escalation Setup:** A note indicating the scheduled time for sending escalations is 9 a.m. AEST.
- By Group:** A tabbed interface with 'By Group' selected. It includes fields for 'Group Name' (People Management Team), 'Group Active' (checked), and 'Region/Site' (ABC Group). Below these is a search bar and a table of people in the group.
- People In Group:** A table with columns for Type, Name, and Email. It lists two workers: Martin Daniels and Lenny Summers, both with green checkmarks in the Email column and 'Delete' buttons.
- Triggers for Groups:** A section with a search bar and two tabs: 'Triggers for Groups' and 'Timing'. It contains a table of triggers with columns for Type, Triggers for Groups, and Timing. The table lists four escalation triggers with 'Actions' buttons.

At the bottom of the page, there is a 'Save' button on the left and a 'Cancel' button on the right. A 'Help' icon is located in the bottom right corner.

Notifications / Escalations

By Notificaion / Escalation cont.

The Group will now appear in the register.

Repeat this procedure for any additional Groups that you wish to add.

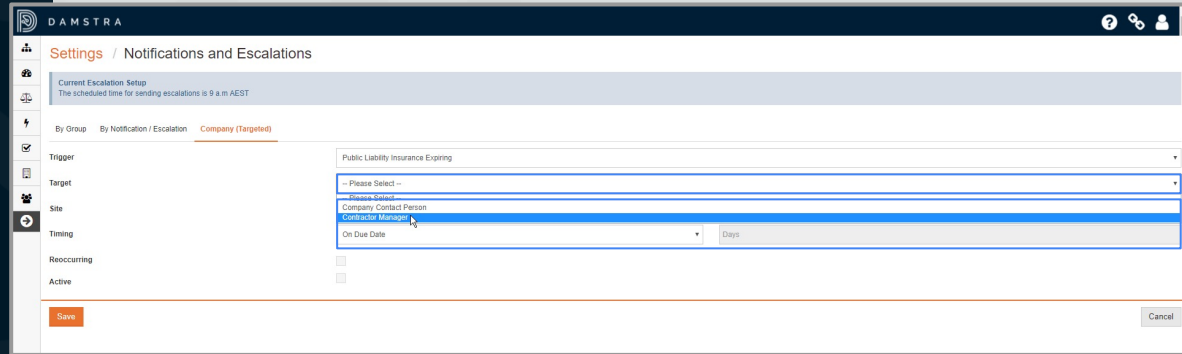
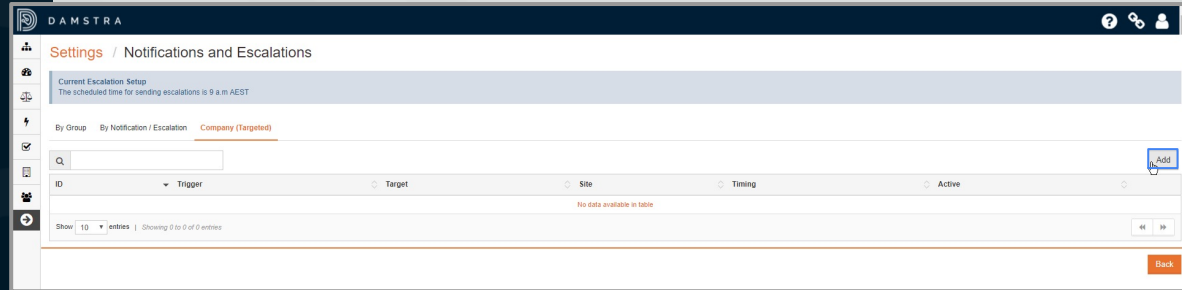
The screenshot displays the 'Settings / Notifications and Escalations' page in the DAMSTRA system. A green success message at the top right indicates 'Record saved successfully!'. The page shows configuration options for escalation settings, including a search bar, a table of existing escalations, and a 'Back' button.

Type	Group	Site	Actions
Escalation	People Management Team	ABC Group	Actions
Escalation	Exec Team - Critical Response	ABC Group	Actions

Notifications / Escalations Company (Targeted) Tab

The *Company (Targeted)* tab is used to notify Contractor Companies of when their various insurance policies are expiring as well as their initial Company Health & Safety induction

To setup this type of trigger, **click 'Add'** and select a trigger from the picklist and a corresponding target – i.e. who should receive this alert.



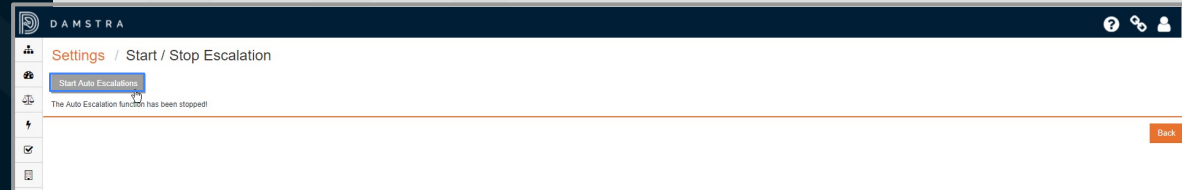
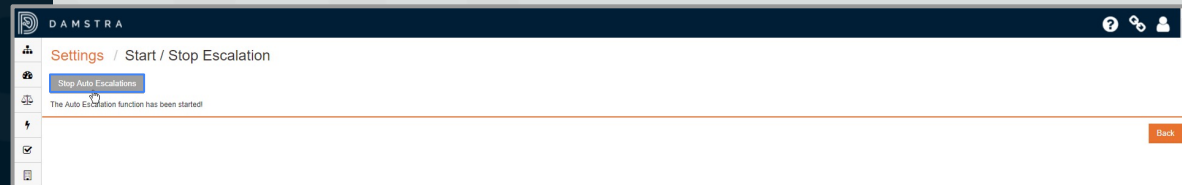
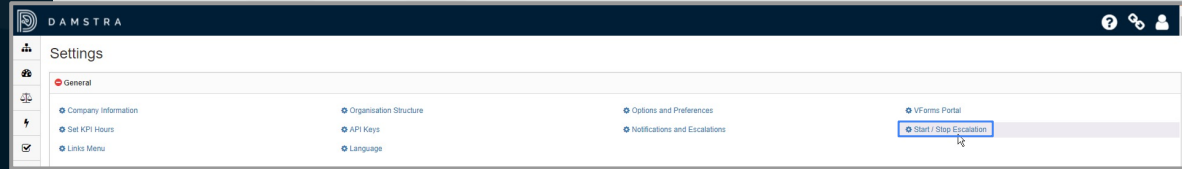
Notifications / Escalations

Start / Stop Escalations

Escalations can be turned on or off using the *Start/Stop Escalation* function within the *General* area of Settings.

Selecting '*Stop Auto Escalations*' will turn off all escalations for all groups. Note that it will not turn off 'Notifications'.

Selecting '*Start Auto Escalations*' will turn on escalations for 'Active' groups.

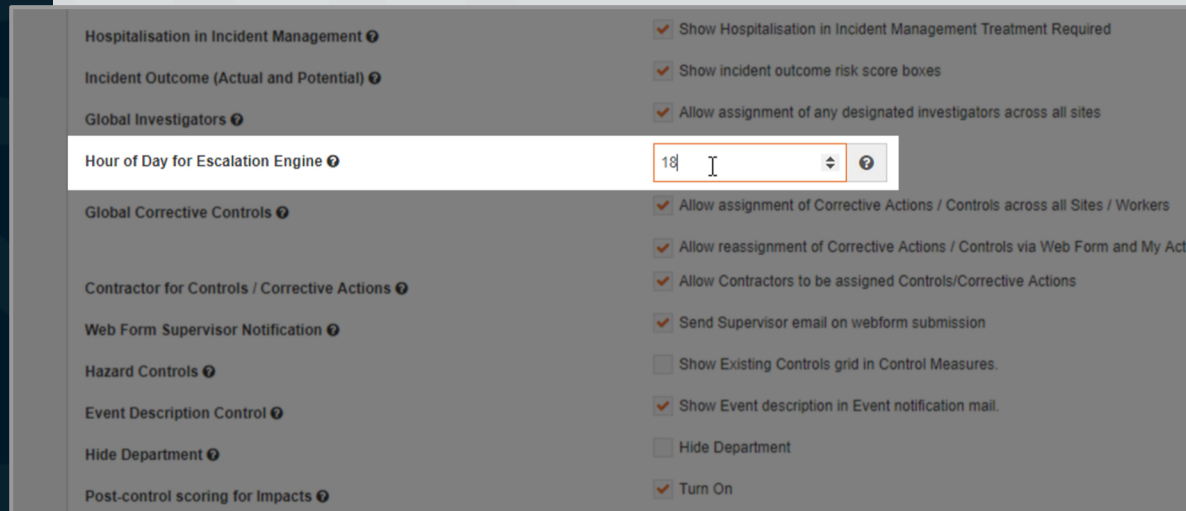
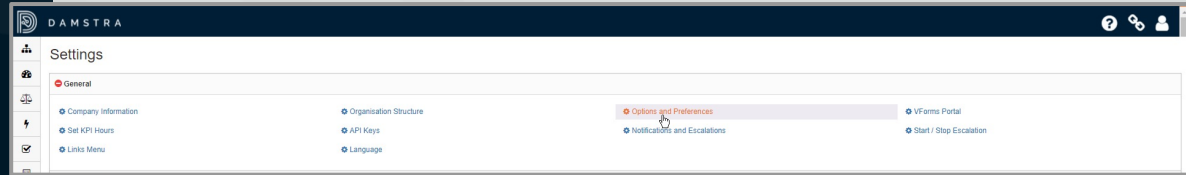


Notifications / Escalations

Scheduling Escalations

To set the time of day when Escalations will be delivered, go to the *Options and Preferences* section within the *General* area of Settings, and **enter** the hour in 24-hour format, using the AEST (Australian Eastern Standard Time) timezone.

For example, for 6pm AEST, **enter** '18'.

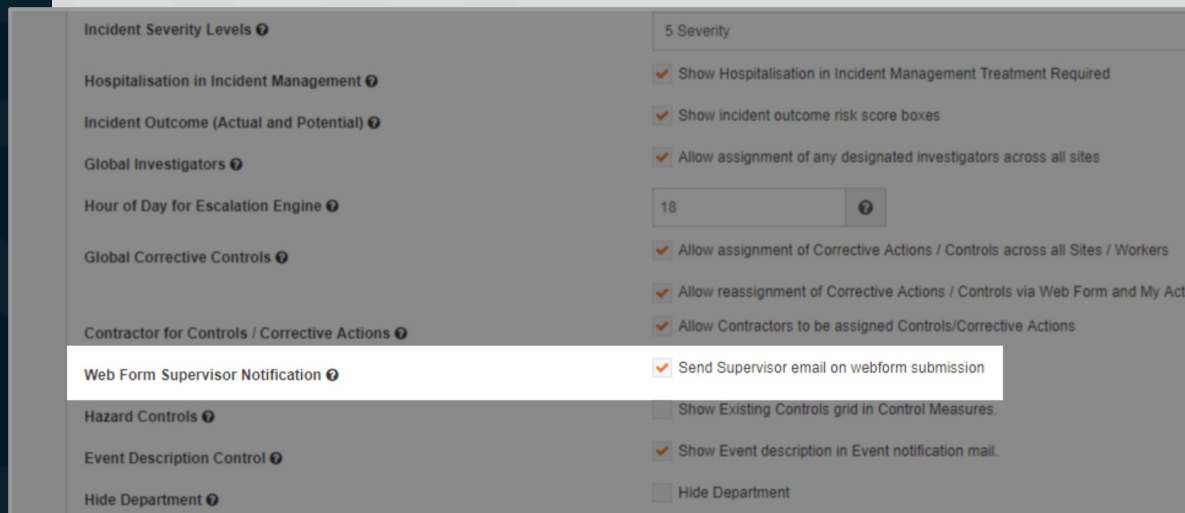
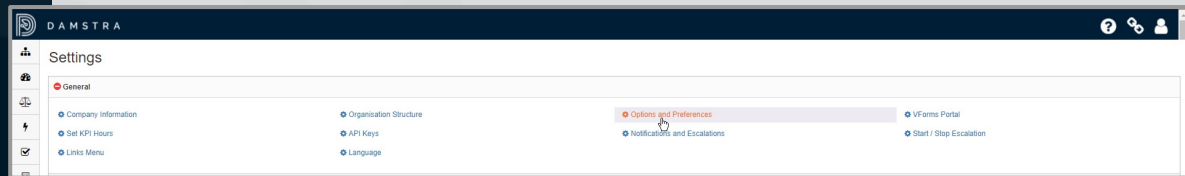


Notifications / Escalations

Additional Options for Events

Finally, if you're working with notifications or escalations for Events such as injuries and illnesses, some additional controls are available in this 'Options and Preferences' screen which you may wish to consider.

Firstly, to ensure that the supervisor of a person involved in an Event which was submitted via a Web Portal or the Notify app is notified of this event, ensure the '*Web Form Supervisor Notification*' checkbox is **enabled**. Or **uncheck** to disable this behaviour.



Notifications / Escalations

Additional Options for Events (cont)

And secondly, if you would like the details included in the 'Event Description' field to be included in the body of any notification or escalation email regarding an Event in your system, ensure that the '*Event Description Control*' checkbox is **ticked**. **Untick** this if you'd rather this information not be shared via email and instead be only viewable within Damstra Safety.

