

#### DAMSTRA

Damstra Safety Essentials Safety



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#### Damstra Safety Essentials Introduction

Welcome to Damstra Safety, your gateway to health and safety risk management. In this video, we'll cover the fundamentals of getting around your system and introduce you to some common procedures and conventions that are found across the entire system, before you go on to learn about procedures in specific areas.

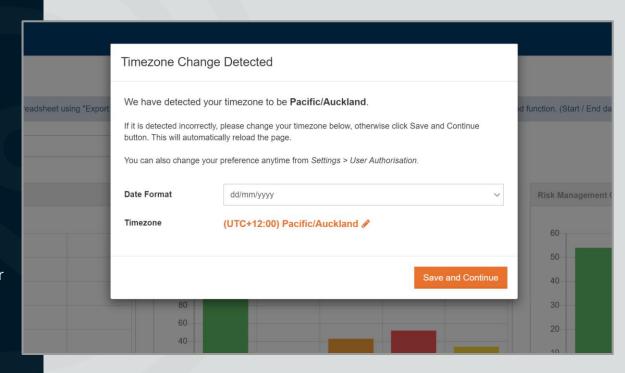
Welcome to Damstra Safety



## Damstra Safety Essentials Introduction to the User Interface

After logging in to your system for the first time, you'll arrive at the default 'My Dashboard' screen, where a popup will indicate that your time zone has been automatically identified. This information is added to all date and time records that you enter into your Damstra Safety system, so ensure it is correct. If not, we can correct it - but more on this later.

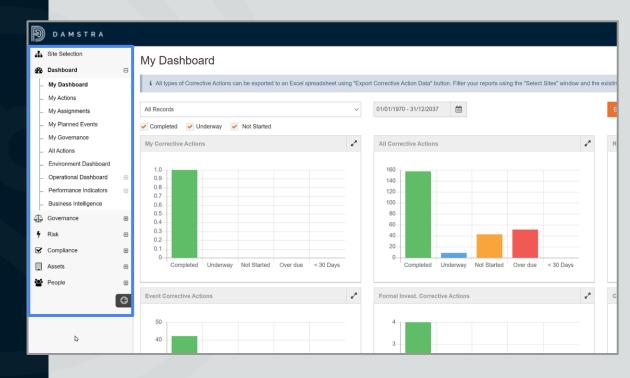
You'll also need to choose the date format you'd like to see when working in your system, so go ahead and select your preference from the picklist. You only need to do this once.





#### Damstra Safety Essentials Menu Bar

The layout of the system remains consistent throughout. To the left of the screen is the *Menu Bar*, which provides access to Damstra Safety's various registers and functions. You can expand the menu bar to display text labels by **clicking** on the arrow, or collapse it by **clicking** the arrow again.

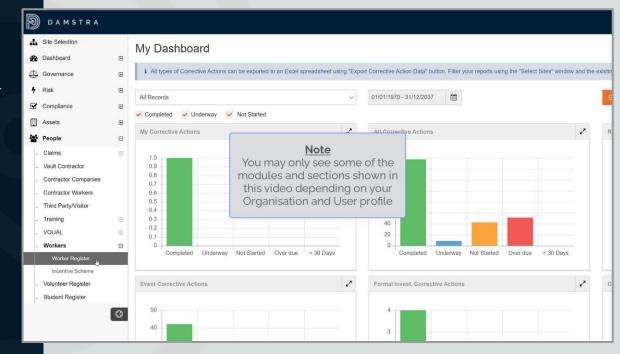




### Damstra Safety Essentials Modules and Sections

To make it easy to find your way around Vault, everything is organised into groups, called 'Modules'. You'll see this in the menu bar itself, where **clicking** a top-level module such as Risk or People will reveal the 'sections' within. Items with a '+' contain further sections and will expand when clicked. **Clicking** a section will open it in the screen to the right.

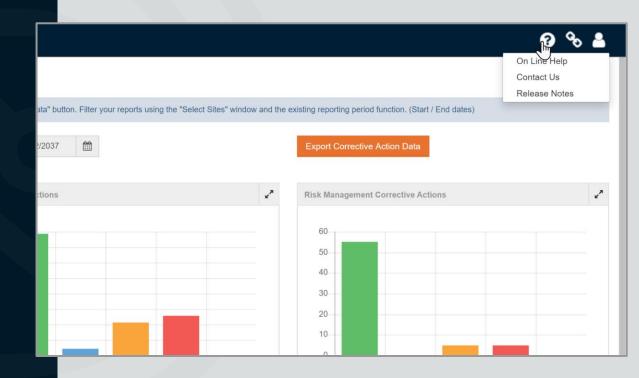
Note that you may only see some of the modules and sections shown in this video. That's because Damstra Safety is configurable and your Organisation may not use all of the features of Vault, or your User profile may have limited access. See your administrator if you have any questions regarding this.





### Damstra Safety Essentials Top Menu

Along the top of the screen, you'll find buttons for help and support, links to other resources as selected by your Organisation, and access to Settings, which we will look at later on in this video.



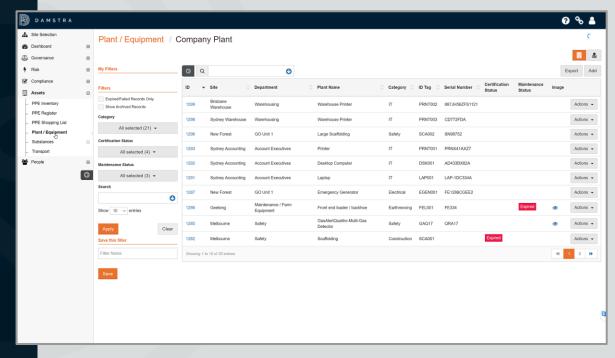


#### Damstra Safety Essentials Registers

Data is held within registers, which can be found within the modules that we see in the menu bar. For example, Worker records are stored within the *Worker Register*, which you'll find inside the *People* module, and records relating to illnesses and injuries are stored within the *Events Register*, which you'll find within the *Risk* module.

And while different registers can store completely different information, the way they look and work is common across the entire system.

To get started, we'll look at the *Plant / Equipment Register*, which is where information about your Organisation's plant and equipment can be recorded. To get there, we'll navigate to it in the menu bar, and **click** it to open it.

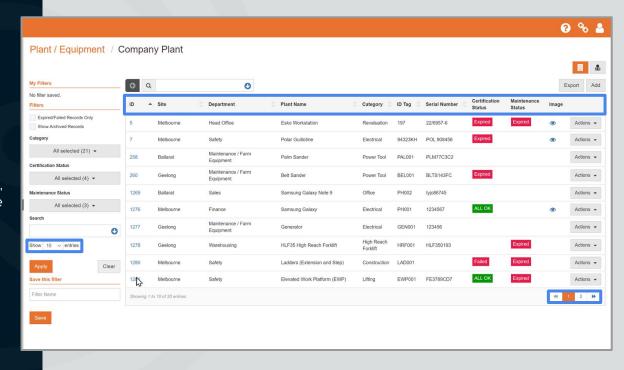




#### Damstra Safety Essentials Sorting and Browsing Registers

Registers are displayed as tables, with individual records in rows and key information displayed in columns.

You can change the sorting order of tables by clicking on the column headers, and browse their contents using the page controls toward the bottom of the table. Change the number of records displayed on one page using the control to the left of the register.



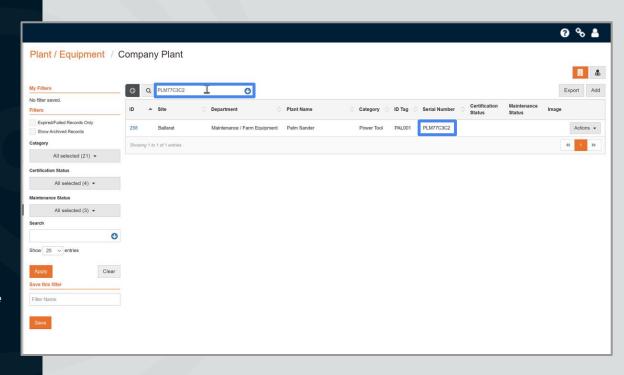


#### Damstra Safety Essentials Searching in Registers

If you're looking for a specific record, you can enter any detail that identifies the entry into the search field above the table.

Depending on what you enter, this can narrow the table down to one result, or many.

For example, in the case of a plant or equipment record, entering a unique value such as a serial number will find one matching result, whereas entering a common item name such as 'Printer' might find multiple records that share the same detail.



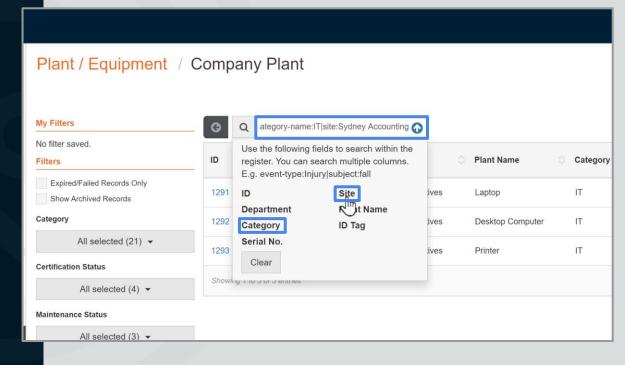


#### Damstra Safety Essentials Advanced Search

More complex queries can be entered just as easily. Let's say you want to find all equipment of a particular category at a particular site. **Clicking** the blue arrow inside the search box reveals additional options that can be used to find data that meets only certain criteria.

The options available will depend on the register you are working in, but in this example, **click** 'Category' and type the name of the category in question, then **click** 'Site' and enter the site you're interested in.

The table is instantly narrowed to only the records that match both <u>criteria</u>.



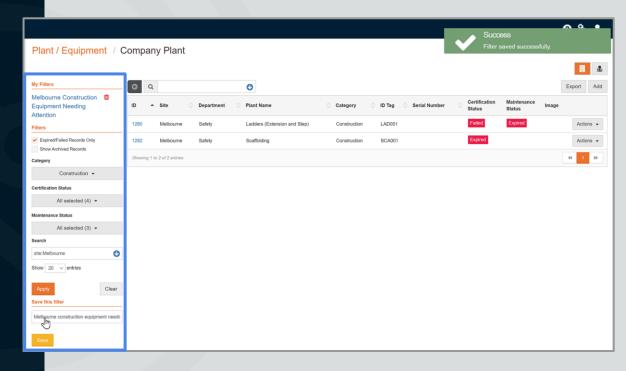


#### Damstra Safety Essentials Filtering Registers

To the left of the table are additional filtering options that allow you to narrow the table to particular criteria using checkboxes and search terms.

Simply **configure** the options to target the data you're interested in and **click** 'Apply'.

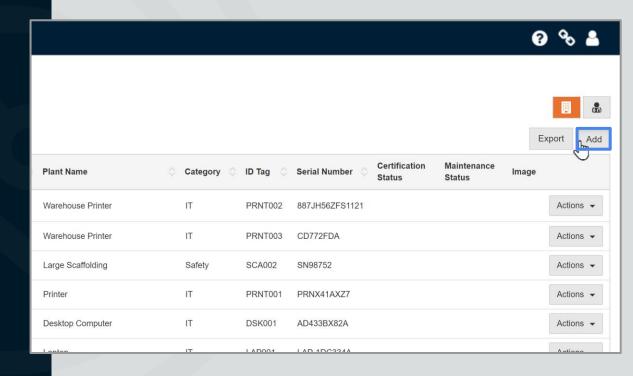
And if this is a view you might want to repeat often, **name** and **save** the filter to add it to the 'My Filters' section. Now, you can apply the filtered view with a single click.





### Damstra Safety Essentials Adding Records to Registers

To add a new record to a register, click the 'Add' button.

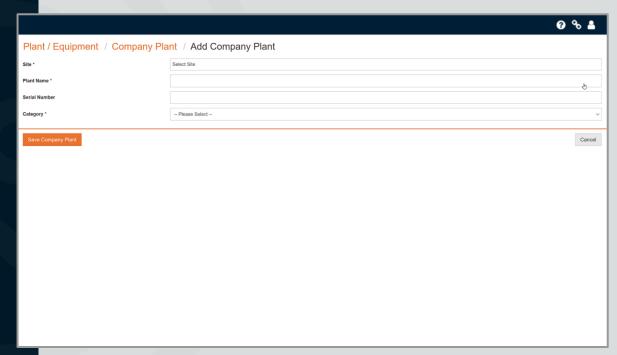




#### Damstra Safety Essentials Short Form

This will open a short form where a minimum amount of data is captured - just enough to start a new record.

Fields with an asterisk are mandatory and must be filled-in before the record can be saved.

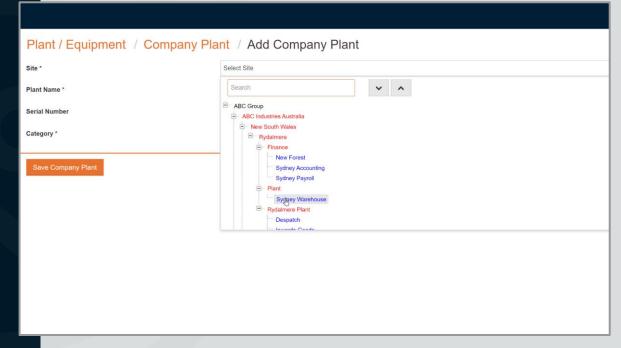




#### Damstra Safety Essentials Selecting a Site

Many record types will ask you to select a 'Site'. This both determines which site the data 'belongs' to, and ensures that it is only visible to who have included this site in their current Site Selection settings - more about this later.

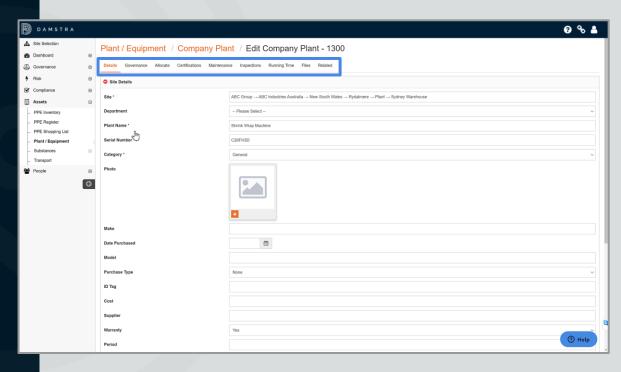
Clicking the site field reveals your Organisation's *Org Structure* which is displayed in a tree hierarchy, with the company itself at the top, individual sites in blue, and categories that group them such as regions or business units in red. **Browse** or **search** for the correct site for this record and **click it** to select.





#### Damstra Safety Essentials Full Records

Saving the short form will open the complete record for the item being added. Records are divided into tabs, which represent the key topics you might want to record about an item, and within each tab are fields for storing as much detail as you'd like.

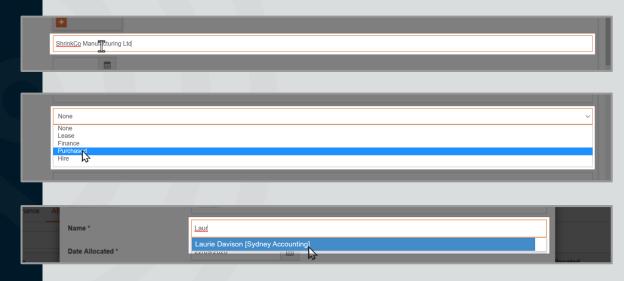




#### Damstra Safety Essentials Field types

Information is added via a number of different field types, which you'll find across all registers:

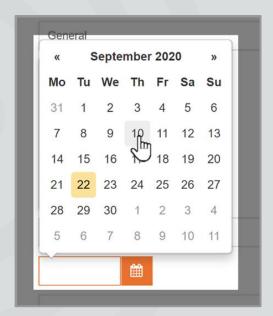
- Empty, blank fields are free-text and can store any typed entry.
- Fields with a down-facing chevron contain pick-lists.
- Fields that say 'Type Something' are smart search fields that find valid options from a list as you begin to type.

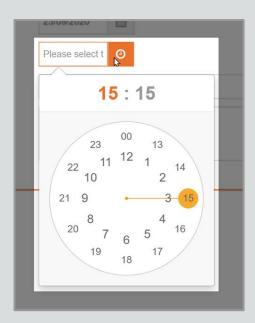




- Fields with a calendar icon require a date, which can be typed or selected from the calendar.
- and fields with a clock icon require a time, which can be typed or selected from the 24-hour clockface by first clicking the hour, then the minute.

# Damstra Safety Essentials Field types cont.





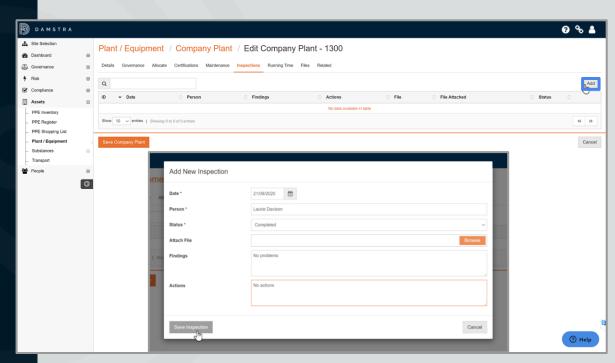


#### Damstra Safety Essentials Registers within Records

Some tabs contain registers of their own. For example a plant or equipment record includes an 'Inspections' tab to keep track of scheduled inspections for the item and their outcomes.

To add data to this register, **click** the 'Add' button, **complete** the pop-up form that appears, and **save**. Each recorded inspection is represented by a row in a table

When you're done with entering information, **click** 'Save' to return to the register where you'll now see your new record.

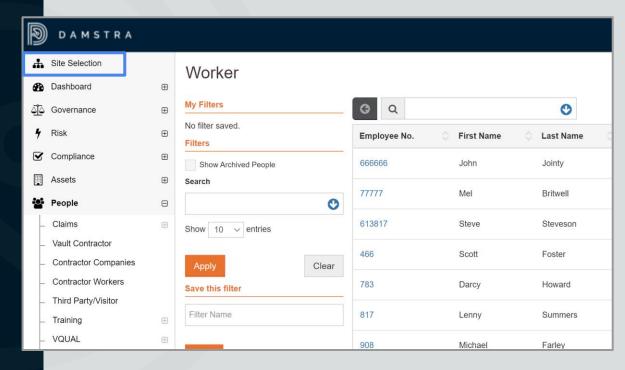




#### Damstra Safety Essentials Site Selection Tool

When viewing the data stored in your system, such as the details of employees in your Workers Register, you can work with information for the entire Organisation, or you can focus on a subset of it. This can be changed whenever you like to suit your current needs. For example, you might want to view worker records for only one particular site for one query, and then all workers across the entire company for the next.

The 'Site Selection' tool is where you can control the scope of the data you'll see. This opens a hierarchical view of your Org Structure as it has been implemented in Vault.



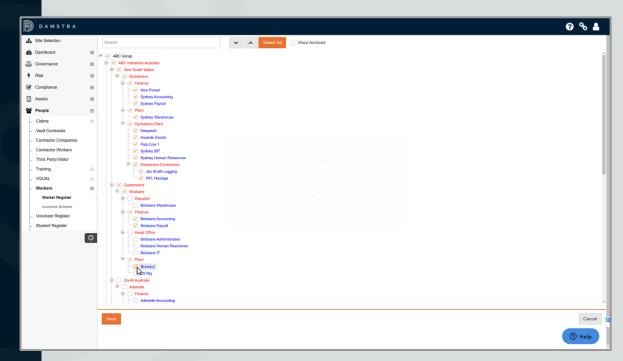


#### Damstra Safety Essentials Site Selection Tool

The company itself sits at the top of the Org structure. You can **click** this to view data for the entire Organisation, or **click** a red level site to view data for a group of sites, or **click** a single blue site to view data for only that site, or any combination in between.

It's worth noting that your User profile may not have the ability to see the entire Organisation, depending on how your access has been set.

**Save** the selection and you'll now see information for only the sites you selected. This selection will persist even when logging out and back in, so return to the Site Selection tool whenever you need to change the sites you'd like to see information for.



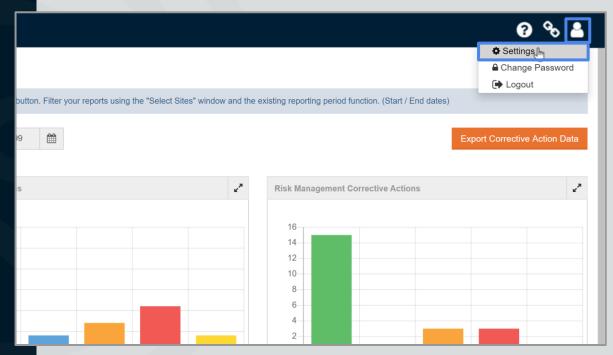


### Damstra Safety Essentials Settings

If your profile permits you with access, Settings is where customisations and preferences across a multitude of modules and registers can be made.

Settings can be accessed via the icon toward the top of the screen.



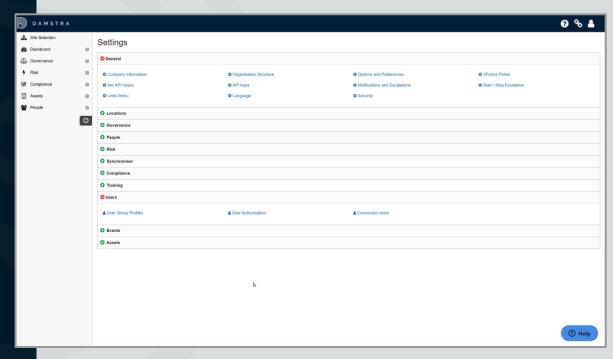




# Damstra Safety Essentials Settings cont.

Settings are grouped into sections that align with the modules in your menu bar, with the 'General' section housing options that have impacts across-the-board, and the 'Users' section being where User access to your system is managed.

For details on working with specific settings, refer to the Knowledge Base, within the Support Portal, which we'll cover later in the video.

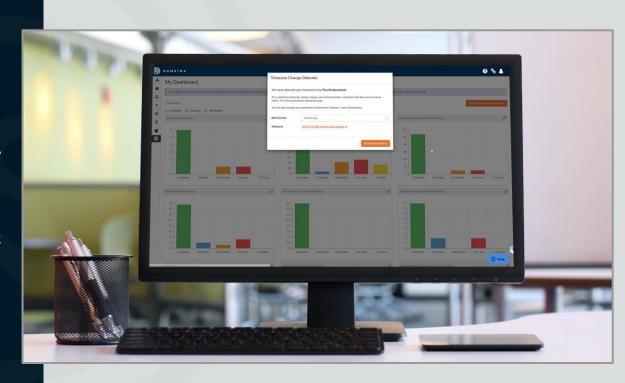




#### Damstra Safety Essentials Time zone Support

If your Organisation works across multiple time zones, it's important to understand how date and time information is treated within your system.

As we saw earlier, your current time zone is automatically detected the first time that you log into your system and is stored as part of your profile. If the time zone detected is incorrect, or your time zone changes due to travel, it's important to update this in your User profile as the detected time zone will be recorded against any date & time data you add to records.



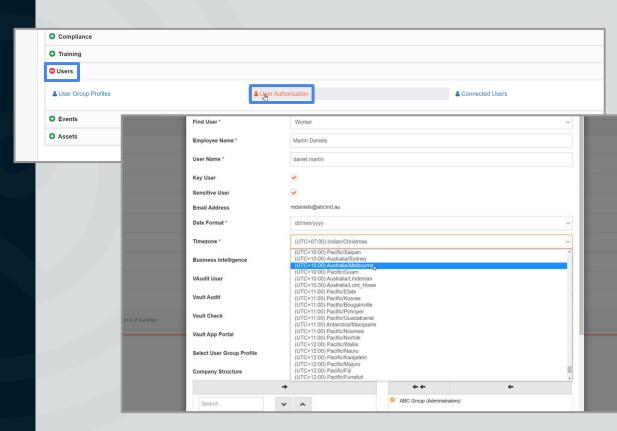


# Damstra Safety Essentials Changing or Updating your time zone

To change or update your time zone, **navigate** to the 'Users' section of Settings, and **select** 'User Authorisation'.

**Locate** your User account and **select** 'Edit'.

**Select** the correct time zone from the picklist, and **save**.



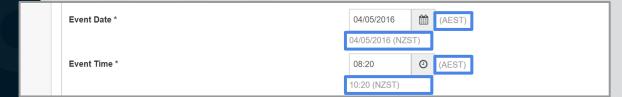


When adding date & time data to new records, you will not be asked to select the time zone. Instead, your system will use your currently-set time zone.

When viewing or working with records that include date & time data that was recorded by a User in a different time zone to your own, your system will display the date and time data in both the record's time zone and yours.

Records that were added to Damstra Safety prior to October 2020 may not have any associated time zone. If required, you can manually select the correct time zone for the record by **editing** it, **selecting** the time zone from the picklist, and **saving**.

## Damstra Safety Essentials Viewing data from a different time zone

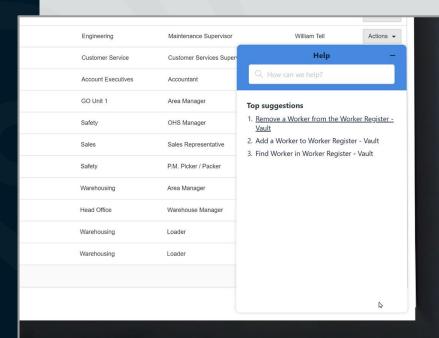




### Damstra Safety Essentials Help and Support

As with learning any new system, we know that you'll need support as you continue getting to know Damstra Safety. Luckily, our Knowledge Base is here to help.

You'll find a 'Help' widget toward the bottom-right of your screen. This feature is present across your entire system and can offer help based on what you're currently doing. For example, clicking the help button while in the Worker Register will suggest help relating to managing Worker records.



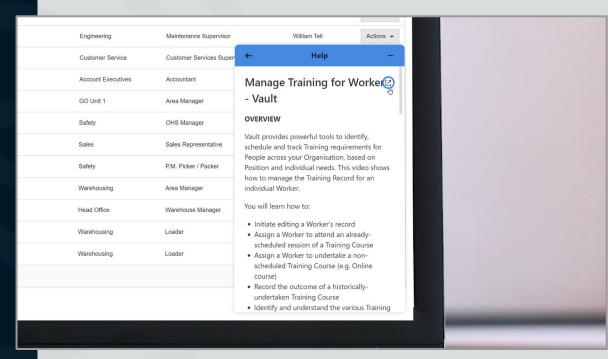


#### Damstra Safety Essentials Help and Support cont.

If you don't see the help you need, go ahead and type your question or enter some keywords. From the results, click to select the article you'd like to view.

Most articles feature a video guide which we recommend viewing in full-screen, as well as a downloadable PDF or PowerPoint document.

To view Knowledge Base articles in a separate web page, click the 'pop out' icon toward the top-right of the widget. This will open the same article within the Support Portal.

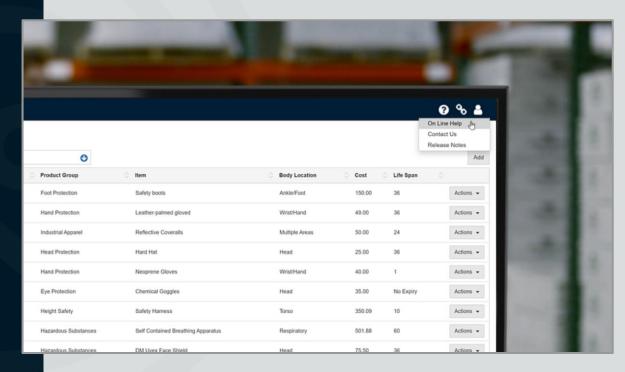




#### Damstra Safety Essentials Accessing the Knowledge Base

You can also visit the Support Portal directly by **clicking** the question mark icon at the top of the screen and selecting 'online help'.

**Click** 'Knowledge Base' to browse, search and view our articles.





#### Damstra Safety Essentials More Help and Support

Or to reach out for technical support, click 'submit a request'.

You've now learned the basics of navigating around and working within your system.

Help with other procedures is available in the Support Portal.

