



D A M S T R A

Manage Corrective
Actions within
Compliance Modules

Safety



[DISCLAIMER]

This presentation document has been prepared by Damstra Technology Limited ("Damstra") and is intended for off line demonstration, presentation and educational purposes.

The information is not version controlled and as such is subject to change without notice.

Damstra does not accept any responsibility or obligation to inform users of this presentation of such changes.

This includes any copies of this presentation taken and modified outside of the Damstra domain.

Introduction

The *Compliance* Section of Damstra Safety provides the ability to identify, assign and manage the progress of associated tasks, for example a task identified during an H&S Meeting or Toolbox Talk, using *Corrective Actions*.

Best practice is to load Corrective Actions in order to record what actions have been taken and / or to assign an individual to carry out a particular corrective task.

Identify

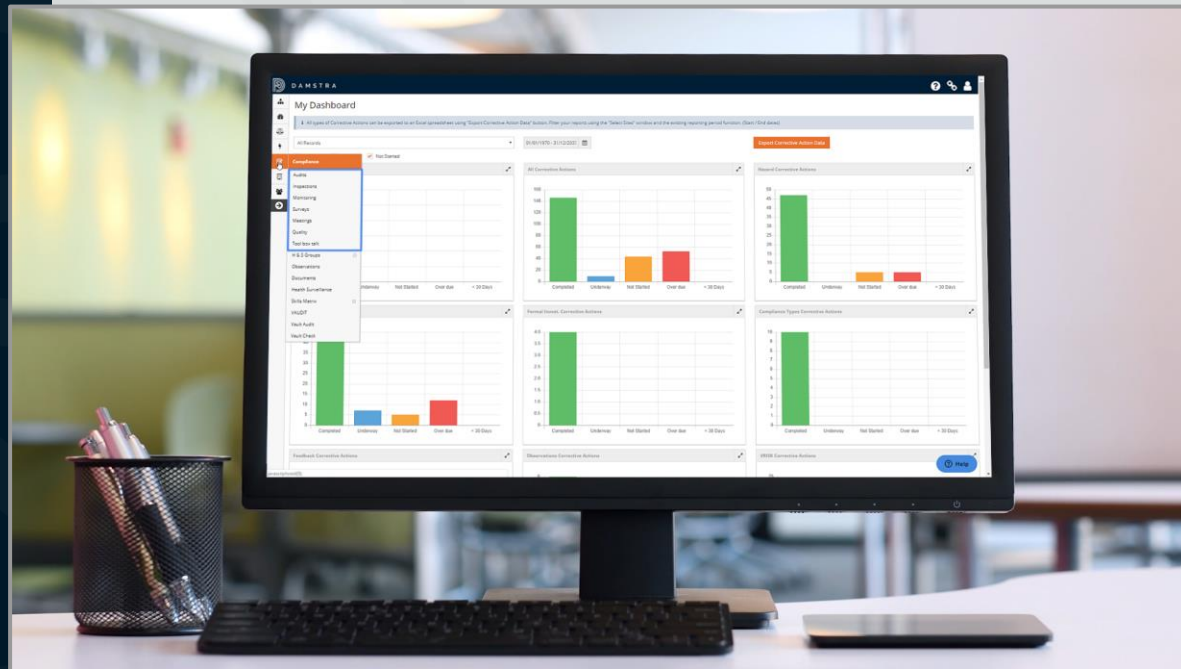
Assign

Manage Progress

Introduction cont.

Note that the number of options and wording maybe different, depending on system settings.

This guide explains how to add, delete and edit Corrective Actions using the Configurable Compliance Modules



Manage CA within Compliance Module

Edit Item

First, **open** the desired Compliance Module, then **locate** the Item you wish to add a Corrective Action to, then edit the item.

To do this, **click** *Actions* then *Edit*,

OR

Click the *Event ID* to view the record, then **click** *Edit*.

The screenshot displays the DAMSTRA 'Inspections' module. On the left is a sidebar with filters for 'My Filters', 'Type', 'Status', and 'Search'. The main area contains a table of inspection records. The first record, ID 11397, is highlighted. An inset window titled 'DAMSTRA - Inspections - View Inspections - 11397' is open, showing the details of this specific inspection. In the top right corner of the table, an 'Actions' dropdown menu is open, showing options for 'Unfollow', 'Edit', and 'Delete'. The 'Edit' option is highlighted with a blue border.

ID	Site	Type	Subject	Accountable to	Assigned to	Findings	Date	Status
11397	New Forest	Vehicle Inspection	Tyre Pressure Insp...	Martin Daniels	Lenny Summers	Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.	04/03/2019	Unfollow
11316	Sydney BIT	Vehicle Inspection	All Vehicles	Adlerly, Warren Ronald	Lenny Summers		17/10/2018	Edit Delete
11317	Sydney BIT	Vehicle Inspection	All Vehicles	Adlerly, Warren Ronald	Lenny Summers		09/10/2018	New Started Actions
11316	Sydney BIT	Vehicle Inspection	All Vehicles	Adlerly, Warren Ronald	Daniel Martin		19/09/2018	New Started Actions
11315	Sydney BIT	Vehicle Inspection	All Vehicles	Adlerly, Warren Ronald	Daniel Martin			
11314	Sydney BIT	Vehicle Inspection	All Vehicles	Adlerly, Warren Ronald	Daniel Martin			
11313	Inwards Goods	Perimeter Inspection	monthly inspection	Cook, Rhonda	Daniel Martin			
10291	Geelong	Fire and Building Code	Fire Extinguisher	Blake, Joshua John	Adlerly, Warren Ronald			
10290	Bellarat	Fire and Building Code	Fire Extinguisher	Martin, Fred Harry	Adlerly, Warren Ronald			
10289	Melbourne	Fire and Building Code	Fire Extinguisher	Smith, Greg	Adlerly, Warren Ronald			
8187	Melbourne	Vehicle Inspection	Check vehicle IPB2...	Smith, Greg	Adlerly, Warren Ronald			

Manage CA within Compliance Module

Add Corrective Action

To load a new Corrective Action, **click** 'Add Corrective Action'.

Then, complete all the mandatory and relevant fields as you go.

DAMSTRA Inspections / Edit Inspections - 11397

Type: Vehicle Inspection

Subject: Tyre Pressure Inspection

Date: 04/03/2019

Accountable: Martin Daniels

Assigned type: Worker

Assigned to: Lenny Summers

Site: ABC Group → ABC Industries Australia → New South Wales → Rydalmere → Finance → New Forest

Status: Underway

Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.

Corrective Action

ID	Action	Person Responsible	Status	Status as at	Completion Date
No data available in table					

Show 10 entries | Showing 0 to 0 of 0 entries

Files

Title	Filename	Actions
Tyre Pressure Inspection 5.02.19.docx	Tyre Pressure Inspection 5.02.19.docx	

Show 10 entries | Showing 1 to 1 of 1 entries

Save

Cancel

Help

Add Corrective Action cont.

Select the Worker type that will be responsible for this Corrective Action.

Type the person's name. Smart Search will make this easier.

The screenshot displays the 'Add Corrective Action' form in the DAMSTRA system. The form is titled 'Inspections / Edit Inspections - 11397 / Add Corrective Action'. It features a sidebar with navigation icons and a main content area with various input fields. The 'Responsible Type' dropdown is set to 'Worker'. The 'Responsible' field contains 'Contracted Worker'. The 'Date Assigned' field is empty, and the 'Date For Completion' field is set to '12/03/2019'. The 'Status' is 'Not Started'. The 'Ref ID' field is empty. The 'Action Required' field is empty. The 'Comments' field has a search bar and a list of entries. The 'Files' section shows a list of files with columns for ID and Title. The 'Log' section shows a list of log entries with columns for Created by, Notified by, Last Modified, and Modified by. A 'Save Corrective Action' button is located at the bottom of the form. An inset window shows a zoomed-in view of the 'Responsible' field with a dropdown menu open, listing 'Worker', 'Contracted Worker', 'Volunteer', and 'Students'.

Date Assigned

Select the 'Date Assigned', either by entering the date directly or by selecting from the calendar.

DAMSTRA

Inspections / Edit Inspections - 11397 / Add Corrective Action

Worker: [Dropdown]

Responsible: [Dropdown] Lenny Summers

Date Assigned: 12/02/2019

Date For Completion: [Dropdown]

Status: [Dropdown]

Ref ID: [Text]

Action Required: [Text]

Comments: [Text] Add Comment

Files: [Table with columns ID, Title, File Name] No data available in table

Log

Created by: [Text]
Notified by: [Text]
Last Modified: [Text]
Modified by: [Text]

Save Corrective Action Cancel Help

Set Current Status

Set the current Status. This will need to be updated as the Corrective Action is undertaken.

Then, state as of what date this status is valid.

The screenshot shows the 'Add Corrective Action' form in the DAMSTRA system. The form includes fields for 'Responsible Type' (Worker), 'Responsible *' (Lenny Summers), 'Date Assigned *' (05/02/2019), 'Date For Completion *' (05/03/2019), and 'Status *'. The 'Status *' dropdown is open, showing options: 'Not Started', 'Not Started', 'Underway', and 'Completed'. The 'Status' is currently set to 'Not Started' with a date of 12/02/2019. Below the status field is the 'Ref ID' field. The 'Action Required *' field is empty. The 'Comments' section has a search bar and a table with no data. The 'Files' section has a table with no data. The 'Log' section shows a list of actions: 'Created by', 'Notified by', 'Last Modified', and 'Modified by'. At the bottom, there are buttons for 'Save Corrective Action', 'Cancel', and 'Help'.

Email Notification

If an assignment email needs to be sent to this person, **tick** the checkbox.

An Email notification will be sent once this Corrective Action is saved.

DAMSTRA

Inspections / Edit Inspections - 11397 / Add Corrective Action

Responsible Type: Worker

Responsible *: Lenny Summers

Date Assigned *: 05/02/2019

Date For Completion *: 05/03/2019

Status *: Underway AS AT 12/02/2019

☒ Notify Responsible Person

Ref ID

Action Required *

Comments

Comments

Show 5 entries | Showing 0 to 0 of 0 entries

Files

ID Title File Name

Show 5 entries | Showing 0 to 0 of 0 entries

Log

Created by

Notified by

Notified by

Last Modified

Modified by

Save Corrective Action

Cancel

Help

Add Reference ID

Add a 'Reference ID' if required.

The screenshot shows the 'Add Corrective Action' form in the DAMSTRA system. The form is divided into several sections:

- Header:** 'Inspections / Edit Inspections - 11397 / Add Corrective Action'
- Form Fields:**
 - Responsible Type:** Worker
 - Responsible *:** Lenny Summers
 - Date Assigned *:** 05/02/2019
 - Date For Completion *:** 05/03/2019
 - Status *:** Underway (dropdown), AS AT (dropdown), 12/02/2019 (calendar icon)
 - Ref ID:** (highlighted with a blue border and a mouse cursor)
 - Action Required *:** (empty text area)
 - Comments:** (search bar, 'Add Comment' button, and a table with 'No data available in table')
 - Files:** (table with 'ID', 'Title', 'File Name' columns, and 'Add File', 'Add URL' buttons)
 - Log:** (table with 'Created by', 'Notified by', 'Last Modified', 'Modified by' columns)
- Buttons:** 'Save Corrective Action' (orange), 'Cancel' (grey), 'Help' (blue with icon)

Add an Action Required

Update the 'Action Required'.

The screenshot shows the 'Add Corrective Action' form in the DAMSTRA system. The form is titled 'Inspections / Edit Inspections - 11397 / Add Corrective Action'. It includes several sections for data entry:

- Worker:** A dropdown menu.
- Responsible *:** A text field containing 'Lenny Summers'.
- Date Assigned *:** A date picker showing '05/02/2019'.
- Date For Completion *:** A date picker showing '05/03/2019'.
- Status *:** A dropdown menu showing 'Underway' with a sub-menu open showing 'AS AT' and '12/02/2019'.
- Notify Responsible Person:** A checkbox that is checked.
- Ref ID:** A text field containing 'REF129450'.
- Action Required *:** A large text area for describing the action required.
- Comments:** A section with a search bar, an 'Add Comment' button, and a table of comments. The table is currently empty with the message 'No data available in table'.
- Files:** A section with an 'Add File' button and a table of files. The table is currently empty with the message 'No data available in table'.
- Log:** A section with a table for logging actions. The table has columns for 'Created by', 'Notified by', 'Last Modified', and 'Modified by'. It is currently empty.

At the bottom of the form, there are two buttons: 'Save Corrective Action' and 'Cancel'. A 'Help' button is also visible in the bottom right corner.

Add a Comment

Add a 'Comment' on this Corrective Action.

Note that Comments are designed to be populated by the person completing the Corrective Action.

DAMSTRA

Inspections / Edit Inspections - 11397 / Add Corrective Action

Worker:

Responsible:

Date Assigned:

Date For Completion:

Status:

☒ Notify Responsible Person

Ref ID:

Action Required:

Comments

Search:

Comments table: No data available in table

Files

Files table: No data available in table

Log

Log table: No data available in table

Save Corrective Action

Cancel

Help

Manage CA within Compliance Module

Add File or URL

Attach any relevant Files or URL links.

Once done, **click** 'Save Corrective Action'.

The screenshot shows the 'Add Corrective Action' form in the DAMSTRA system. The breadcrumb trail is 'Inspections / Edit Inspections - 11397 / Add Corrective Action'. The form includes the following fields and sections:

- Responsible Type:** Worker
- Responsible *:** Lenny Summers
- Date Assigned *:** 05/02/2019
- Date For Completion *:** 05/03/2019
- Status *:** Underway, AS AT, 12/02/2019
- Notify Responsible Person:** ☒ (icon)
- Ref ID:** REF123456
- Action Required *:** Pump tyres on vehicles which fail tyre pressure inspection
- Comments:** Search bar, 'Add Comment' button, and a table with 'No data available in table'.
- Files:** 'Add File' and 'Add URL' buttons, and a table with 'No data available in table'.
- Log:** A table with columns for 'Created by', 'Notified by', 'Last Modified', and 'Modified by'.

At the bottom, there is a 'Save Corrective Action' button and a 'Cancel' button. A 'Help' icon is also present in the bottom right corner.

Notification Email

A 'notification email' to the person you assigned this Corrective Action to is now shown.

The 'recipient and 'subject' will be automatically populated, though this can be manually altered if required, and additional recipients or CC recipients can be added.

The screenshot displays the DAMSTRA web application interface. At the top, the breadcrumb navigation shows 'Inspections / Edit Inspections - 11397 / Notify - 4028'. The form is divided into several sections:

- To:** A text field containing 'lenny.summers@ebc.com'.
- CC:** An empty text field.
- Subject:** A text field containing 'Corrective Action Accountability - Inspections - ID: A-11397-4028'.
- Attach File:** A section with a 'Select file' button and a 'Browse' button.
- Header Text:** A large text area containing the following content:

DO NOT REPLY to this automated message. Please use the email address at the bottom to contact the sender directly.

You have been assigned responsibility for a Corrective Action.

Webform ID: A-11397-4028

Inspections ID: 11397
Type: Vehicle Inspection
Subject: Tyre Pressure Inspection
Responsible: Martin Daniels
Site: New Forest
Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.

Corrective Action ID: 4028
Responsible Person: Lenny Summers
Responsible Site: New Forest
Responsible Department: Finance
Date Assigned: 12/02/2019
Date for Completion: 26/02/2019
Status: Underway
Status As At: 12/02/2019
Corrective Action: add
- Comments/Message:** A large text area at the bottom for additional comments or messages.

The interface includes a sidebar on the left with various icons and a 'Help' button in the bottom right corner.

Manage CA within Compliance Module

Attach File

Optionally attach any related files.

The screenshot displays the DAMSTRA web application interface. The top navigation bar includes the DAMSTRA logo and user profile icons. The main header shows the breadcrumb: **Inspections / Edit Inspections - 11397 / Notify - 4028**.

The left sidebar contains a vertical menu with icons for: Users, To, CC, Subject, Attach File (highlighted), Header Text, and Settings.

The main content area is titled **Corrective Action Accountability - Inspections - ID: A-11397-4028**. It features a 'Select file' input field with a blue border and a 'Browse' button. Below this, a warning message states: **DO NOT REPLY** to this automated message. Please use the email address at the bottom to contact the sender directly. You have been assigned responsibility for a Corrective Action.

The **Webform ID: A-11397-4028** section provides the following details:

- Inspections ID: 11397
- Type: Vehicle Inspection
- Subject: Tyre Pressure Inspection
- Responsible: Martin Daniels
- Site: New Forest
- Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.

The **Corrective Action ID: 4028** section provides the following details:

- Responsible Person: Lenny Summers
- Responsible Site: New Forest
- Responsible Department: Finance
- Date Assigned: 12/02/2019
- Date for Completion: 26/02/2019
- Status: Underway
- Status As At: 12/02/2019
- Corrective Action: address

At the bottom, there is a 'Comments/Message' section with a rich text editor toolbar (including Bold, Italic, Underline, Open Sans font, and various icons) and a large text area for input. A 'Help' button is located in the bottom right corner.

Notification Email cont.

The email automatically includes comprehensive details about the Corrective Action, including the name of the inspection, the date for completion and the person responsible.

Add any additional comments or notes, which can be added as free text.

The screenshot displays the DAMSTRA web application interface. At the top, the navigation bar shows 'Inspections / Edit Inspections - 11397 / Notify - 4028'. The left sidebar contains icons for user management, email, CC, subject, attach file, header text, and settings. The main content area is an email composition form. The 'To' field contains 'lenny.summers@abc.com'. The 'CC' field contains 'Martin Daniels (Worker) [martin.daniels@abc.com]'. The 'Subject' field contains 'Corrective Action Accountability - Inspections - ID: A-11397-4028'. The 'Attach File' field contains 'Tyre Pressure Corrective Action 4.03.19.docx'. The 'Header Text' field contains a warning: 'DO NOT REPLY to this automated message. Please use the email address at the bottom to contact the sender directly. You have been assigned responsibility for a Corrective Action.' Below this, the 'Webform ID: A-11397-4028' is displayed, followed by details about the inspection: 'Inspections ID: 11397', 'Type: Vehicle Inspection', 'Subject: Tyre Pressure Inspection', 'Responsible: Martin Daniels', 'Site: New Forest', and 'Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.' The 'Corrective Action ID: 4028' is also shown, along with 'Responsible Person: Lenny Summers', 'Responsible Site: New Forest', 'Responsible Department: Finance', 'Date Assigned: 12/02/2019', 'Date for Completion: 26/02/2019', 'Status: Underway', 'Status As At: 12/02/2019', and 'Corrective Action address'. At the bottom, there is a 'Comments/Message' section with a text area and a 'Send' button.

Notification Email cont.

You can also see the details of who created this Corrective Action.

Click 'Send' to send this email to the recipient.

Attach File

Header Text

Footer Text

Comments/Message

Send

Cancel

Help

Tyre Pressure Corrective Action 4.03.19.docx

DO NOT REPLY to this automated message. Please use the email address at the bottom to contact the sender directly.
You have been assigned responsibility for a Corrective Action.

Webform ID : A-11397-4028

Inspections ID: 11397
Type: Vehicle Inspection
Subject: Tyre Pressure Inspection
Responsible: Martin Daniels
Site: New Forest
Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.

Corrective Action ID: 4028
Responsible Person: Lenny Summers
Responsible Site: New Forest
Responsible Department: Finance
Date Assigned: 12/02/2019
Date for Completion: 26/02/2019
Status: Underway
Status As At: 12/02/2019
Corrective Action: asdad

Please call me about this Corrective Action this afternoon. Thanks!

This email has been sent by:
User Name: Lenny Summers
Type: Employee
Name: Lenny Summers
Email Address: Lenny.Summers@abc.com
Vault URL: https://digitalcontent-01.vaultgc.com

Save Corrective Action

This new Corrective Action will be saved to the register.

The screenshot shows the 'Edit Inspections - 11397' form in the DAMSTRA system. A green success banner at the top right indicates 'Success Email sent successfully.' The form fields are as follows:

- Type: Vehicle Inspection
- Subject: Tyre Pressure Inspection
- Date: 04/03/2019
- Accountable: Martin Daniels
- Assigned type: Worker
- Assigned to: Lenny Summers
- Site *: ABC Group → ABC Industries Australia → New South Wales → Rydalmere → Finance → New Forest
- Status: Underway
- Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.

The 'Corrective Action' section contains a table with one entry:

ID	Action	Person Responsible	Status	Status as at	Completion Date	Actions
4028	Pump up tyres on vehicles which fail tyre pressure inspection.	Lenny Summers	Underway	12/02/2019	26/02/2019	Actions

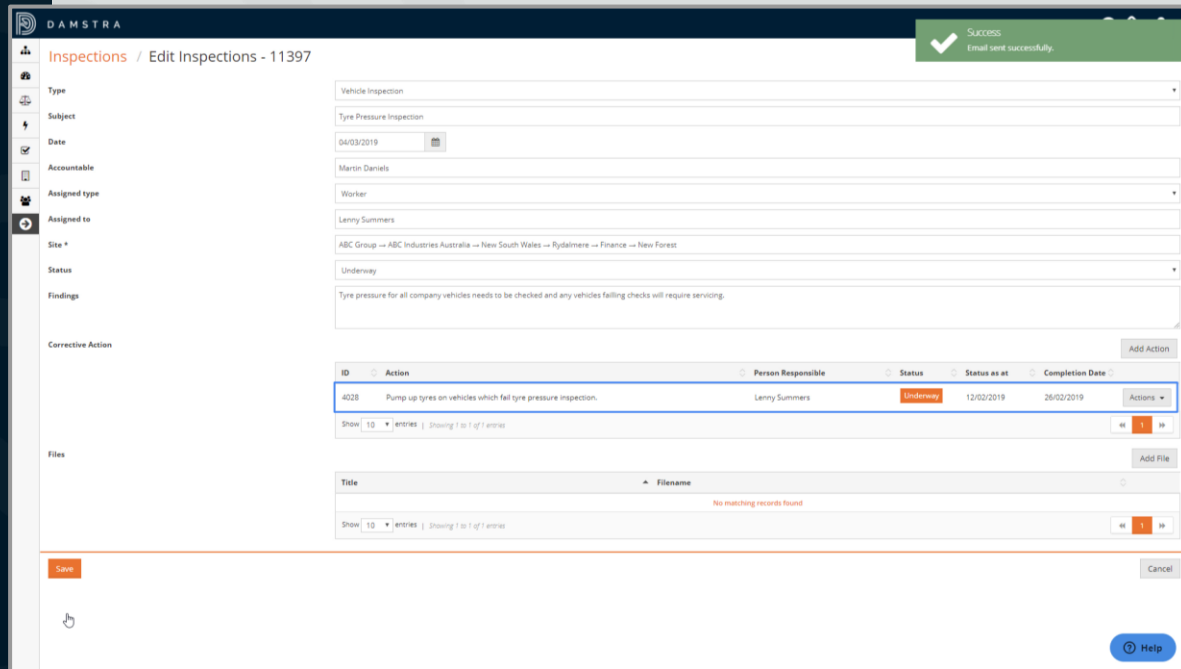
Below the table, it says 'Show 10 entries | Showing 1 to 1 of 1 entries'. The 'Files' section below it is empty, with a message 'No matching records found'.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A 'Help' button is located in the bottom right corner.

Multiple Corrective Actions

Multiple Corrective Actions can be added to a record.

Simply **repeat** these steps whenever a new Corrective Action needs to be loaded.



The screenshot displays the 'Edit Inspections - 11397' page in the DAMSTRA system. A green success banner at the top right indicates 'Success: Email sent successfully.' The left sidebar contains navigation icons for various inspection details. The main form area includes fields for Type (Vehicle Inspection), Subject (Tyre Pressure Inspection), Date (06/03/2019), Accountable (Martin Daniels), Assigned type (Worker), Assigned to (Lenny Summers), Site (ABC Group → ABC Industries Australia → New South Wales → Rydalmere → Finance → New Forest), Status (Underway), and Findings (Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing).

Below the findings, the 'Corrective Action' section features a table with the following data:

ID	Action	Person Responsible	Status	Status as at	Completion Date	Actions
4028	Pump up tyres on vehicles which fail tyre pressure inspection.	Lenny Summers	Underway	12/02/2019	26/02/2019	Actions

Below the table, there are sections for 'Files' and 'Show' options. The 'Files' section shows 'No matching records found'. The 'Show' options are set to '10 entries' and 'Showing 1 to 1 of 1 entries'.

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a 'Help' button in the bottom right corner.

Manage CA within Compliance Module

Edit or Delete

If a Corrective Action needs to be edited or deleted, this can be done via the 'Actions' button.

Note that deleting an item is permanent and cannot be undone.

The screenshot shows the DAMSTRA 'Edit Inspections - 11397' interface. The left sidebar contains navigation icons for various functions. The main form includes fields for Type, Subject, Date, Accountable, Assigned type, Assigned to, Site *, Status, and Findings. Below these is a table of Corrective Actions. The first row of the table is highlighted, and the 'Actions' button for this row is circled in red. The table has columns for ID, Action, Person Responsible, Status, Status as at, and Completion Date. The second row of the table is also visible. Below the table is a 'Files' section with a 'Title' field and a 'Filename' field. The bottom of the interface has a 'Save' button, a 'Cancel' button, and a 'Help' button.

ID	Action	Person Responsible	Status	Status as at	Completion Date
4028	Pump up tyres on vehicles which fail tyre pressure inspection.	Lenny Summers	Underway	12/02/2019	26/02/2019
4029	Order new replacement tyres for affected vehicles.	Lenny Summers	Underway	13/02/2019	28/02/20

Manage CA within Compliance Module

Save Record

To complete these updates, **click 'Save'.**

DAMSTRA Inspections / Edit Inspections - 11397

Type: Vehicle Inspection

Subject: Tyre Pressure Inspection

Date: 06/03/2019

Accountable: Martin Daniels

Assigned type: Worker

Assigned to: Lenny Summers

Site *: ABC Group → ABC Industries Australia → New South Wales → Rydalmere → Finance → New Forest

Status: Underway

Findings: Tyre pressure for all company vehicles needs to be checked and any vehicles failing checks will require servicing.

Corrective Action

ID	Action	Person Responsible	Status	Status as at	Completion Date
4028	Pump up tyres on vehicles which fail tyre pressure inspection.	Lenny Summers	Underway	12/02/2019	26/02/2019
4029	Order new replacement tyres for affected vehicles.	Lenny Summers	Underway	13/02/2019	28/02/2019

Show 10 entries | Showing 1 to 2 of 2 entries

Files

Title: No matching records found

Show 10 entries | Showing 1 to 1 of 1 entries

Save **Cancel** **Help**

