



D A M S T R A



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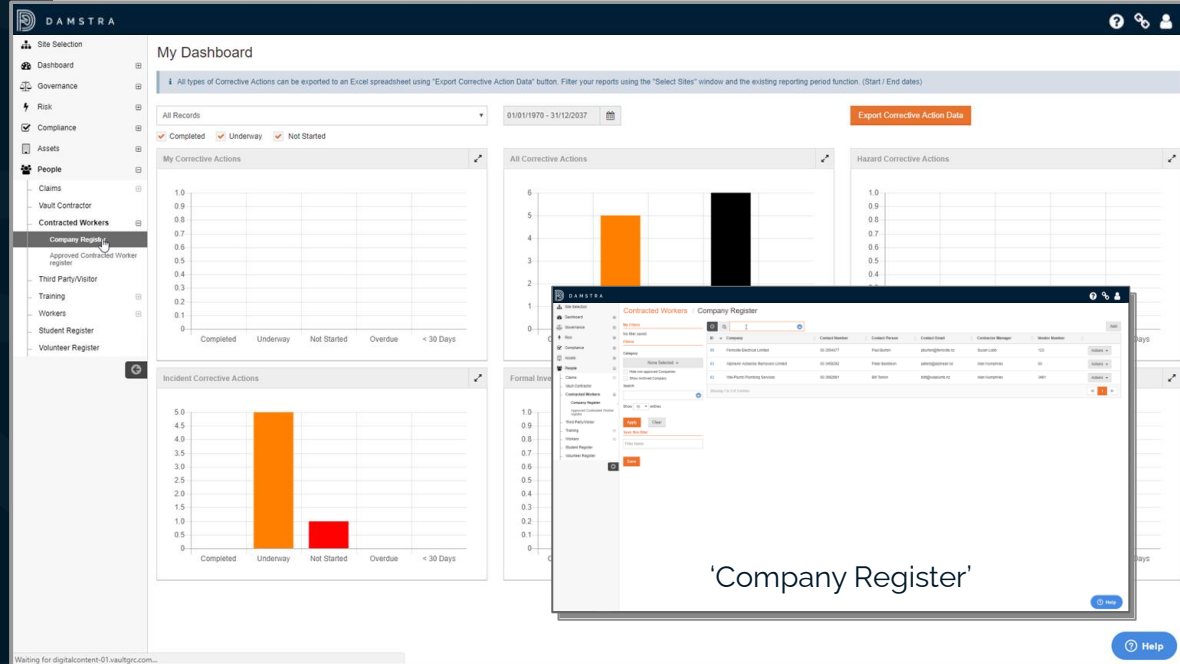
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Update Projects

Company register

Vault provides the ability to store details of projects that involve a Contracting Company

This is managed by editing the 'Company' record in the 'Company Register'. This is found under *People* in the 'Menu bar'.



Update Projects

Edit Company

Locate the Company involved in the 'Company Register'.

Once found, there are two ways to initiate editing the Company.

Either:
Click 'Actions' then 'Edit'.

Or, **click** the 'Company ID' to view the record, then **click** 'Edit'.

Contracted Workers / Company Register

My Filters
No filter saved.
Filters

Category
None Selected
Hide non-approved Companies
Show Archived Company

Search

Show 15 entries

Apply Clear

Save this filter
Filter Name

Save

ID	Company	Contact Number	Contact Person	Contact Email	Contractor Manager	Vendor Number	Actions
65	Femside Electrical Limited	03 3554377	Paul Burton	pburton@femside.nz	Susan Lobb	123	View Edit Delete Archive View workers

Showing 1 to 1 of 1 entries

Help

https://dgl/falconcontent-01.vaultgrc.com/personnel/companyRegister#edit-65

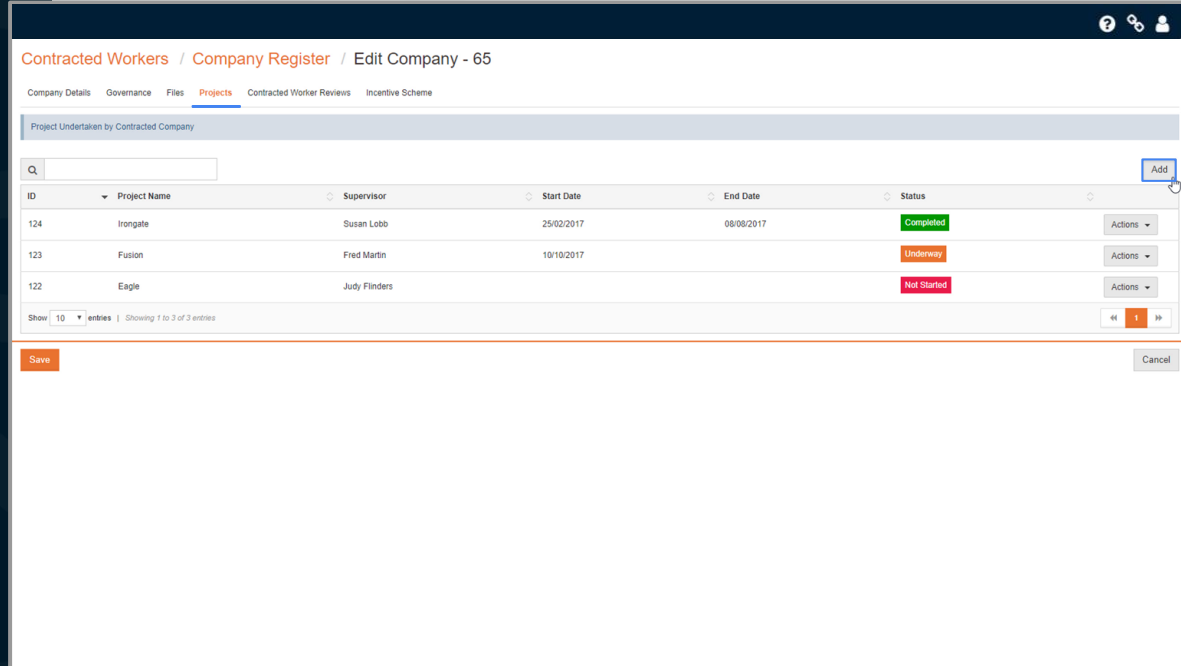
Update Projects

Add Project

Click the 'Projects' tab.

The page shows any existing projects loaded against the 'Company' record.

To add a new project, **click** 'Add'.



Contracted Workers / Company Register / Edit Company - 65

Company Details Governance Files **Projects** Contracted Worker Reviews Incentive Scheme

Project Undertaken by Contracted Company

Q

ID	Project Name	Supervisor	Start Date	End Date	Status	
124	Irongate	Susan Lobb	25/02/2017	08/08/2017	Completed	Actions
123	Fusion	Fred Martin	10/10/2017		Underway	Actions
122	Eagle	Judy Flinders			Not Started	Actions

Show 10 entries | Showing 1 to 3 of 3 entries

Save Cancel

Update Projects

Add Project Form

The 'Projects Undertaken by Contractor' section stores the key details of the project.

Work your way through the form, **completing** mandatory and relevant fields as you go.

Enter the 'Project Name'.

Select the 'Project Status' from the drop-down list.

The screenshot shows the 'Add Project Form' within the DAMSTRA system. The breadcrumb trail at the top reads: 'Contracted Workers / Company Register / Edit Company - 65'. Below this, a navigation bar includes links for 'Company Details', 'Governance', 'Files', 'Projects' (which is highlighted), 'Contracted Worker Reviews', and 'Incentive Scheme'.

The main section is titled 'Projects Undertaken by Contractor'. It contains several form fields:

- Project Name:** A text input field with the value 'Apex'.
- Project Status:** A dropdown menu with options: '-- Please Select --', '-- Please Select --', 'Not Started', 'Underway', and 'Completed'. The 'Completed' option is currently selected.
- Start Date:** A text input field.
- End Date:** A text input field.
- Supervisor:** A text input field with the placeholder 'Type Something...'.

Below these fields is a section titled 'Post Contract Evaluation' with a 'Responsible' text input field (placeholder 'Type Something...') and a 'Post Contract Evaluation' text area.

Further down is a 'Files' section with an 'Add File' button. Below this is a table with columns 'Category' and 'Filename'. The table is currently empty, with a message 'No data available in table' displayed. The table has a 'Show' dropdown set to '10' and a 'Showing 0 to 0 of 0 entries' indicator.

At the bottom of the form, there are two buttons: 'Save Project' (highlighted in orange) and 'Save' (highlighted in orange). To the right of these buttons are 'Cancel' buttons.

The DAMSTRA logo is visible in the bottom left corner, and a 'Help' button is in the bottom right corner.

Update Projects

Add Project Form cont.

Depending on the chosen status, you may need to **enter** the start date for the project, the end date or both by either **typing** the date in the field, or by **clicking** the calendar icon and selecting the date from the date picker.

Type the name of the person at your Organisation responsible for the project into the 'Supervisor' field.

Smart Search will help find this person as you type.

Contracted Workers / Company Register / Edit Company - 65

Company Details Governance Files **Projects** Contracted Worker Reviews Incentive Scheme

Projects Undertaken by Contractor

Project Name Apex

Project Status * Completed

Start Date * 17/01/2018

End Date 12/03/2018

Supervisor Susan Lobb [Bellair]

Post Contract Evaluation

Responsible Type Something...

Post Contract Evaluation

Files

Category Filename

No data available in table

Show 10 entries | Showing 0 to 0 of 0 entries

Save Project Save

Help

Update Projects

Add Project Form cont.

The 'Post Contract Evaluation' section is where we can record observations around the Contracting Company's performance on the project.

Type the name of the person at your Organisation responsible for the evaluation in the 'Responsible' field.

Again, Smart Search will intelligently find the person as you begin to type their name.

The screenshot displays the 'Edit Company - 65' form, specifically the 'Projects' tab. The form is divided into three main sections: 'Projects Undertaken by Contractor', 'Post Contract Evaluation', and 'Files'.

- Projects Undertaken by Contractor:** This section contains fields for 'Project Name' (Apex), 'Project Status' (Completed), 'Start Date' (17/01/2018), 'End Date' (12/03/2018), and 'Supervisor' (Susan Lobb).
- Post Contract Evaluation:** This section contains a 'Responsible' field (Bob Jones) and a 'Post Contract Evaluation' text area (Successfully delivered on time and under budget).
- Files:** This section contains a 'Category' field (Filename) and a 'Files' table. The table is currently empty, with a message 'No data available in table'.

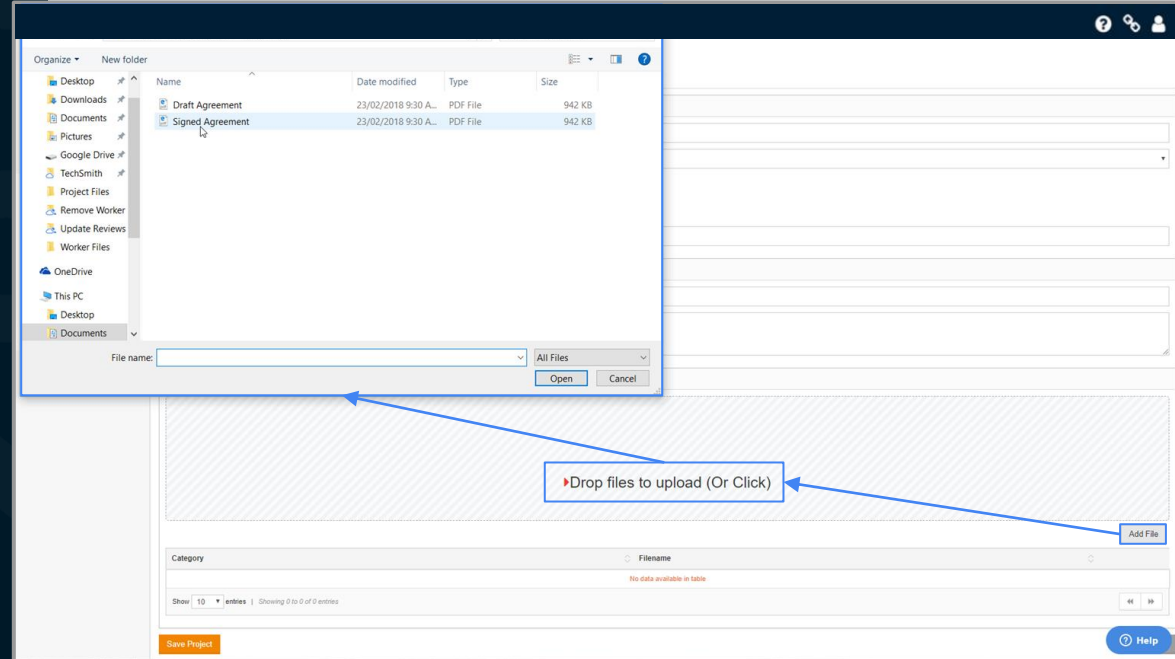
At the bottom of the form, there are buttons for 'Save Project', 'Save', and 'Cancel'. A 'Help' button is located in the bottom right corner.

Update Projects

Add Files

The 'Files' section is where copies of any files relating to the Contracting Company's involvement in the project may be stored - for example, a scanned copy of a signed agreement, work permit or insurance policies.

To add a file, **click** 'Add File', then drag and drop the file or click to locate it.



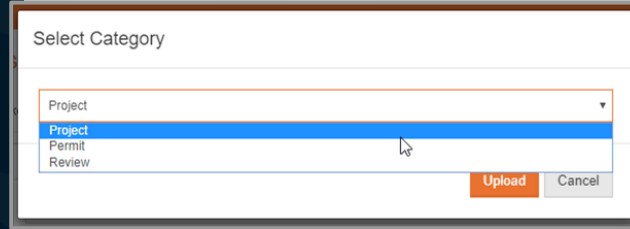
Update Projects

Select File Category

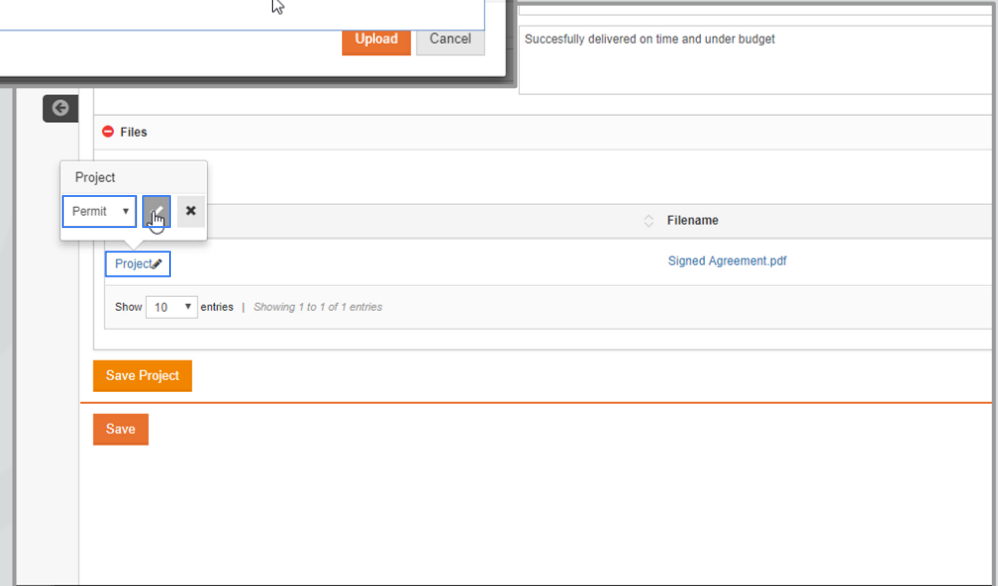
At the prompt, **select** the 'Category' that best fits the file.

Vault will store a copy of the file, and it will then appear in the 'Files' register.

To edit the category, **click** the 'Category Name' and **select** the new 'Category' from the drop-down list, then **click** the 'tick'.



A dialog box titled "Select Category" with a white background and a thin border. It contains a dropdown menu with the text "Project" and a downward arrow. The dropdown is open, showing three options: "Project" (highlighted in blue), "Permit", and "Review". To the right of the dropdown are two buttons: "Upload" (orange) and "Cancel" (grey).



A screenshot of a web application interface. At the top, a message says "Successfully delivered on time and under budget". Below this is a section titled "Files" with a red minus icon. A modal window is open over the "Files" section, showing a dropdown menu with "Project" selected and a "tick" icon. The modal also has a "Project" label and a "tick" icon. Below the modal, there is a table with one entry: "Signed Agreement.pdf". The table has a "Filename" header. Below the table, there are two buttons: "Save Project" (orange) and "Save" (orange).

Update Projects

Download File

To download a copy of the file, simply **click** the 'File Name'.

To delete the file from Damstra Safety, **click** 'Delete'. This action cannot be undone.

Once all mandatory and relevant fields have been populated, **click** 'Save Project'.

Contracted Workers / Company Register / Edit Company - 65

Company Details Governance Files **Projects** Contracted Worker Reviews Incentive Scheme

Projects Undertaken by Contractor

Project Name: Apex

Project Status: Completed

Start Date: 17/01/2018

End Date: 12/03/2018

Supervisor: Susan Lobb

Post Contract Evaluation

Responsible: Bob Jones

Post Contract Evaluation: Successfully delivered on time and under budget

Files

Category	Filename	
Permit	Signed Agreement.pdf	Delete

Show 10 entries | Showing 1 to 1 of 1 entries

Save Project Save Cancel

Help Show all

Update Projects

Project Saved

The project now appears in the 'Projects' register.

Click 'Save' to return to the 'Company Register'.

Contracted Workers / Company Register / Edit Company - 65

Record saved successfully!

Company Details Governance Files **Projects** Contracted Worker Reviews Incentive Scheme

Project Undertaken by Contracted Company

Q

Add

ID	Project Name	Supervisor	Start Date	End Date	Status	
127	Apex	Susan Lobb	17/01/2018	12/03/2018	Completed	Actions
124	Irongate	Susan Lobb	25/02/2017	08/08/2017	Completed	Actions
123	Fusion	Fred Martin	10/10/2017		Underway	Actions
122	Eagle	Judy Flinders			Not Started	Actions

Show 10 entries | Showing 1 to 4 of 4 entries

Save

Cancel

Help

Show all

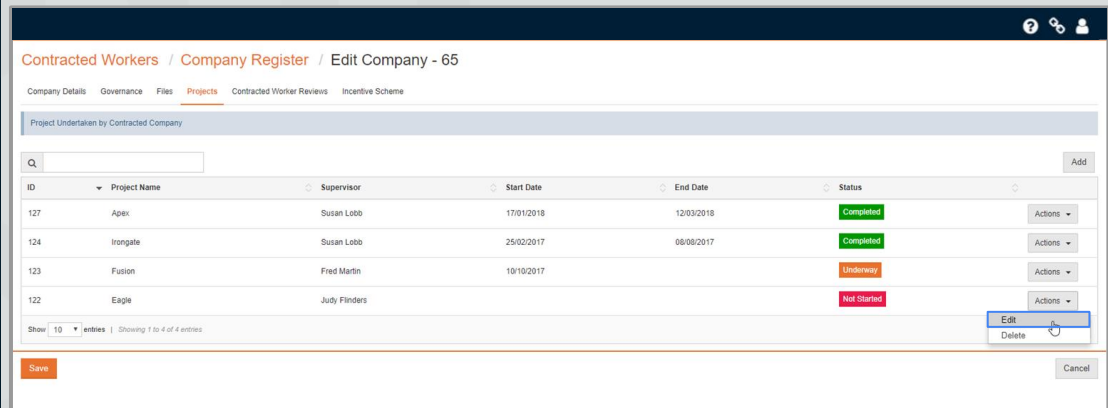
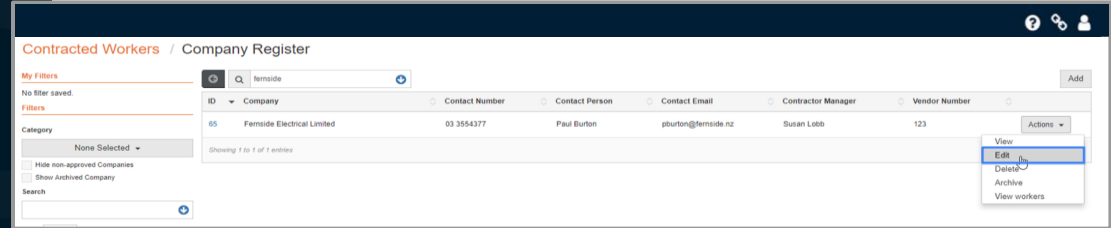
Update Projects

Editing the Project

Updating the progress of a project is done by editing the project.

Click 'Actions' then 'Edit' to edit the Company record, then go to the 'Projects' tab.

Locate the project in the 'Projects' Register and **click** 'Actions', then 'Edit'.



Update Projects

Project Saved

Make the appropriate amendments for your scenario, for example the 'status' of the project may have changed, then **click** 'Save Project'.

The record is saved and changes are reflected in the 'Projects' Register. **Click** 'Save' to return to the 'Company' Register.

The image shows two overlapping screenshots of a web application interface. The top screenshot is a 'Save Project' dialog box. It contains fields for 'Responsible' (with a placeholder 'Type Something...') and 'Post Contract Evaluation'. Below these is a 'Files' section with a table showing one file: 'Signed Agreement.pdf' under the 'Category' 'Project'. At the bottom of the dialog are buttons for 'Save Project', 'Save', and 'Cancel'. The bottom screenshot shows the 'Projects' register for 'Contracted Workers / Company Register / Edit Company - 65'. It features a breadcrumb trail and tabs for 'Company Details', 'Governance', 'Files', 'Projects' (selected), 'Contracted Worker Reviews', and 'Incentive Scheme'. A search bar is present above a table of projects. The table has columns for ID, Project Name, Supervisor, Start Date, End Date, and Status. Four projects are listed: 'Apex' (Completed), 'Irongate' (Completed), 'Fusion' (Undersway), and 'Eagle' (Undersway). The 'Eagle' row is highlighted with a blue border. At the bottom of the register are 'Save' and 'Cancel' buttons. A green notification bar at the top right of the register says 'Record saved successfully!'.

Responsible: Type Something...

Post Contract Evaluation

Files

Category	Filename
Project	Signed Agreement.pdf

Show 10 entries | Showing 1 to 1 of 1 entries

Save Project Save Cancel

Contracted Workers / Company Register / Edit Company - 65

Record saved successfully!

Company Details Governance Files Projects Contracted Worker Reviews Incentive Scheme

Project Undertaken by Contracted Company

Q

ID	Project Name	Supervisor	Start Date	End Date	Status	Actions
127	Apex	Susan Lobb	17/01/2018	12/03/2018	Completed	Actions
124	Irongate	Susan Lobb	25/02/2017	08/08/2017	Completed	Actions
123	Fusion	Fred Martin	19/10/2017		Undersway	Actions
122	Eagle	Judy Finders	13/03/2018		Undersway	Actions

Show 10 entries | Showing 1 to 4 of 4 entries

Save Cancel

