HSEQ Management Software

myosh Classic V4 Inspections & Audits Manual

Table of Contents

myosh Inspections & Audits

1. Introduction

The Inspection/Audit manual focuses on:

- Creating Inspection templates and Inspection Documents
- Scheduling Inspections
- Calculating Inspection Audit Scores
- Putting Corrective Actions in place
- Completing Inspections.
- Searching Inspections.

All three access levels, Administrators, Power Users and Users play a part in the Inspection module.

2. Access Responsibilities

The access responsibilities for Inspection/Audits are as shown below:

Inspection Workflow	Administrator	Power User	User
Set up Inspection Template	✓		
Clone Inspection Templates	✓		
Archive Inspection Templates	✓		
Schedule Inspections	✓		
Create Inspections	✓	✓	
Clone Inspections	✓	✓	
Complete Inspections	✓	✓	
Search for Inspections	✓	✓	
Display Inspections	✓	✓	✓
Print Inspections	✓	✓	✓

Note: None Users cannot do anything in this module and can't be assigned actions.

3. Inspection Templates

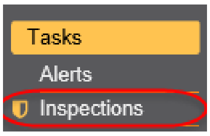
Explanation

The Inspection Templates are the basis of the Inspection Module. Therefore prior to creating an Inspection document the Inspection Templates must be set up. Templates can be added to any subsequent Inspection. These templates can only be set up by the myosh Administrator.

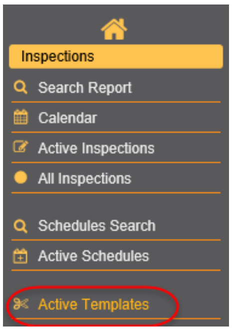
Creating an Inspection Template

To create an Inspection Template:

1. Click on the Inspections button under Tasks on the myosh main menu.

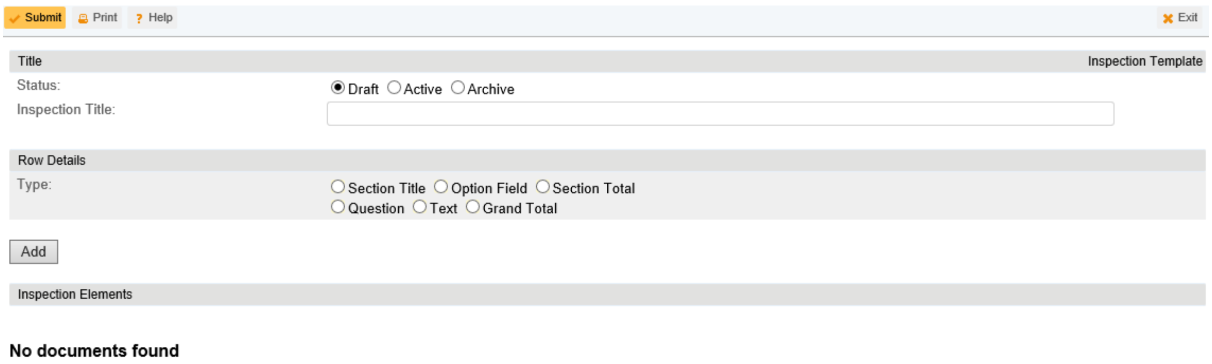


2. Click on Active Templates.



3. Click on 

to create the new template and the following screen will appear.



4. Select the Status by clicking in the relevant radio button.
5. Enter the Inspection Title

Row Details

There are six different row types that can be chosen, they are:

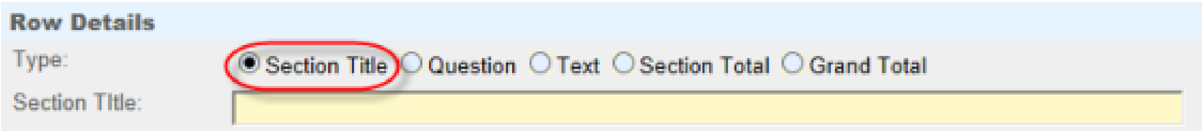
- Section Title
- Question
- Option Field
- Text
- Section Total
- Grand Total.

When setting up the rows select the different types in the order that they need to be displayed in the inspection. The instructions below show how to set up the different row types.

Section Title

To add a Section title:

1. Click in the radio button named “Section Title”, and the follow screen will appear

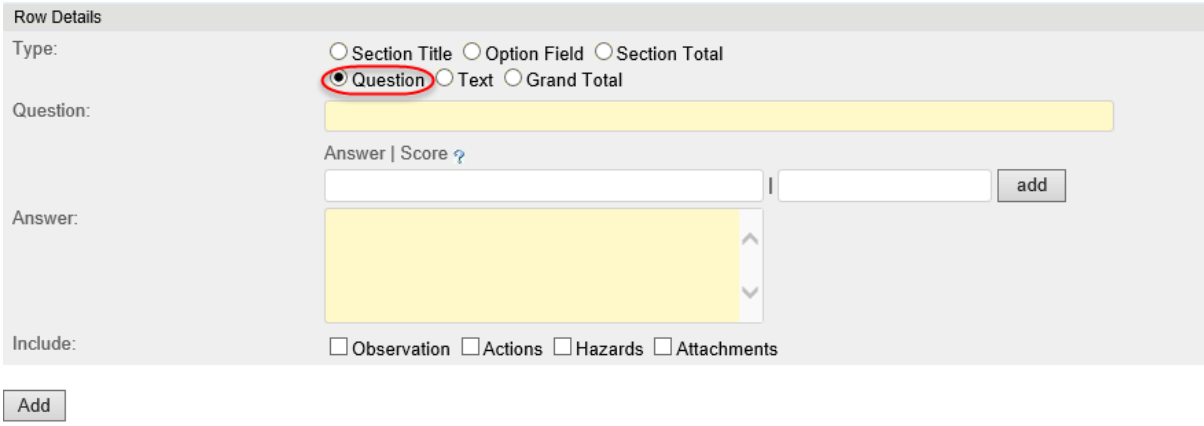


2. Enter the Section Title

Question

To add questions:

1. Click in the radio button named “Question”, and the following screen will appear



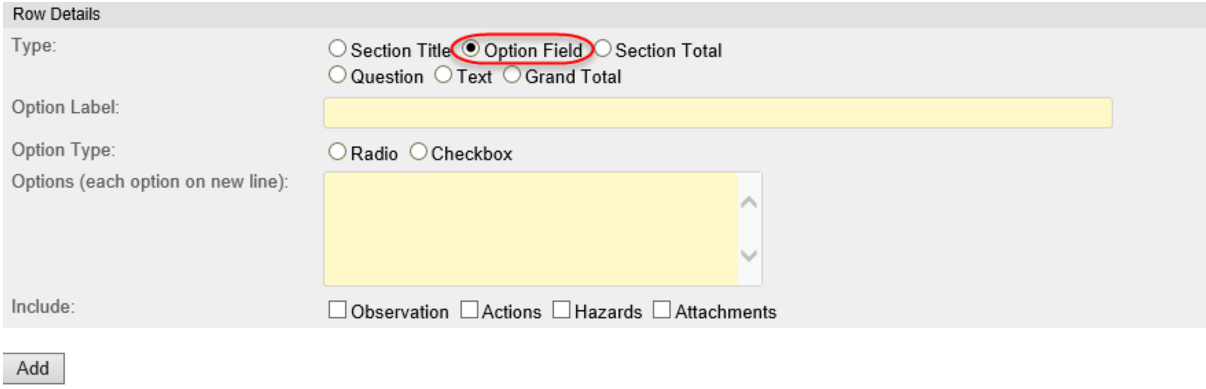
2. Enter the Question
3. Enter in the first column enter the Answer to the question and in the second column enter the score; as shown below. The score is how much is that answer worth in the scheme of doing business.

4. Click on “Add” and the Answer will be auto-populated.
5. Select what needs to be included with the question, by clicking in the relevant tick boxes. Note: these will not be mandatory in the inspection form.
6. Click on Add.

Option Field

To add an Option Field:

1. Click in the radio button named “Option Field”, and the following screen will appear

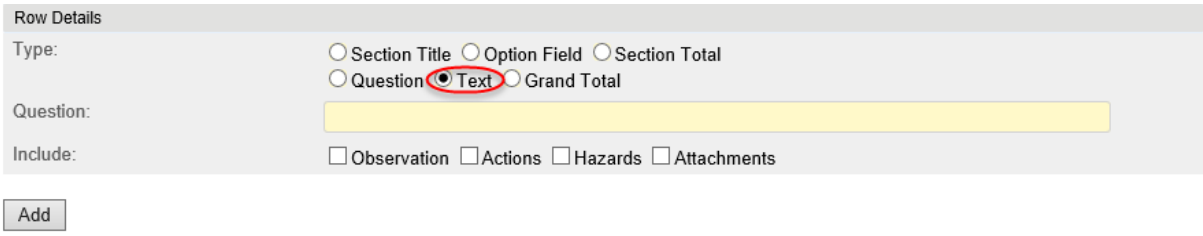


2. Enter the Option Label
3. If a score is required, enter the Answer into the first textbox and a score into the second textbox and click on Add. These will auto-populate into the textbox.
4. Select the Option Type by clicking in the relevant radio button (circle)
5. Enter the Options into the text box provided, one option per line.
6. Select what needs to be included with the option, by clicking in the relevant tick boxes. Note: these will not be mandatory in the inspection form.
7. Click on Add.

Text

To add text:

1. Click in the radio button named “Text”, and the following screen will appear

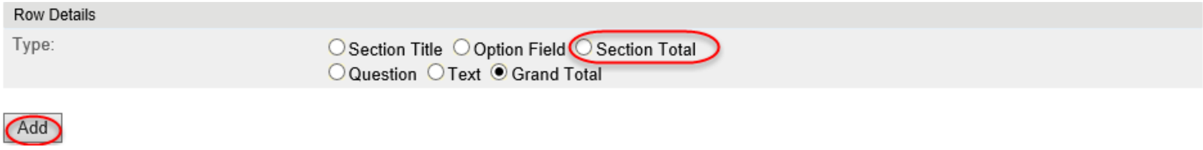


2. Enter the text in the Question text box
3. Select what needs to be included with the question, by clicking in the relevant tick boxes. Note: these will not be mandatory in the inspection form.

Section Total

To add a section total:

1. Click in the radio button named “Section Total”, and the following screen will appear

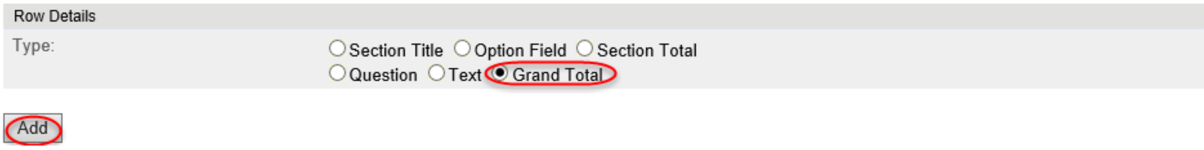


2. Click on Add

Grand Total

To add a grand total:

1. Click in the radio button named “Grand Total”, and the following screen will appear



2. Click on Add

Note: As the inspection components are added they appear under the inspection Elements, if they aren’t in the correct order, click on the title and drag and drop into correct location.

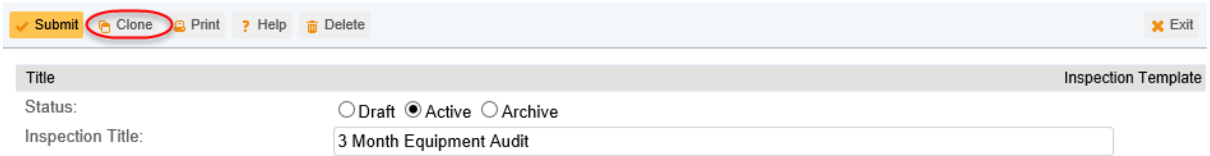
Draft templates will not appear in the drop down list when creating an inspection.

Cloning Active Templates

If an Active Template is the same for a number of inspections, rather than recreating the Active Template, myosh allows for cloning of the template.

To clone an Inspection Template;

1. Click on Active Template
2. Click on the Active Template to be cloned
3. Click on Edit
4. Click on Clone



5. Amend the template
6. Click on Submit and when asked “Are you sure....” click on Yes.

Note: Once the Clone Active Template has been submitted, myosh will revert back to the screen showing all Active Templates.

Archiving Templates

If a Template is no longer relevant, myosh allows for the template to be archived. To archive a template;

1. Click on Active Templates
2. Click on the active template that needs to be archived
3. Click on edit
4. Under Title change the status to Archive.
5. Click on Submit

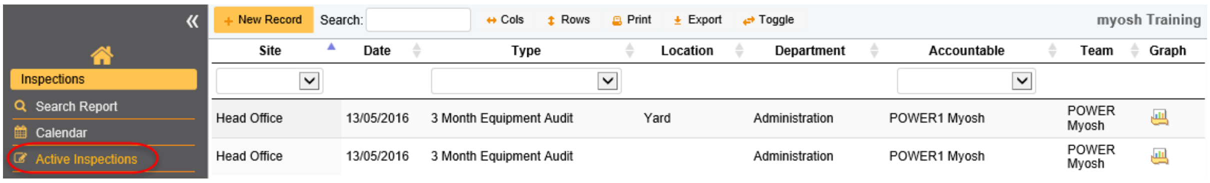
Note: The template will then be stored under Archived Templates. To unarchive the template use the same steps and change the status back to Active.

4. Creating Inspections

Once the Templates have been created by the myosh Administrator, then the Power Users can create an Inspection document using one or more of the templates.

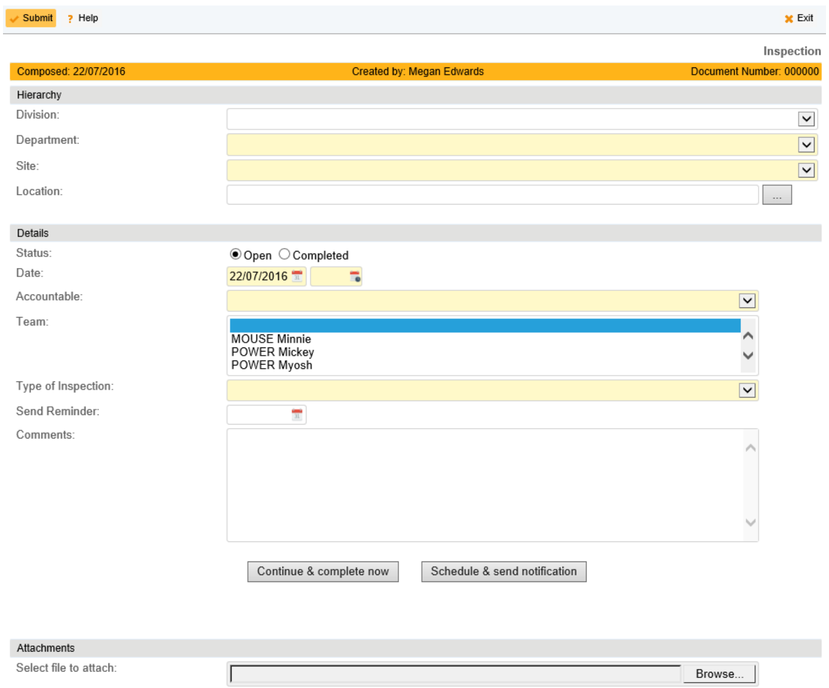
To create an Inspection document:

1. Click on the Inspections button under Task on the myosh main menu. This will display a list of Active Inspection Documents as shown below.



2. Click on 

The following will be displayed.

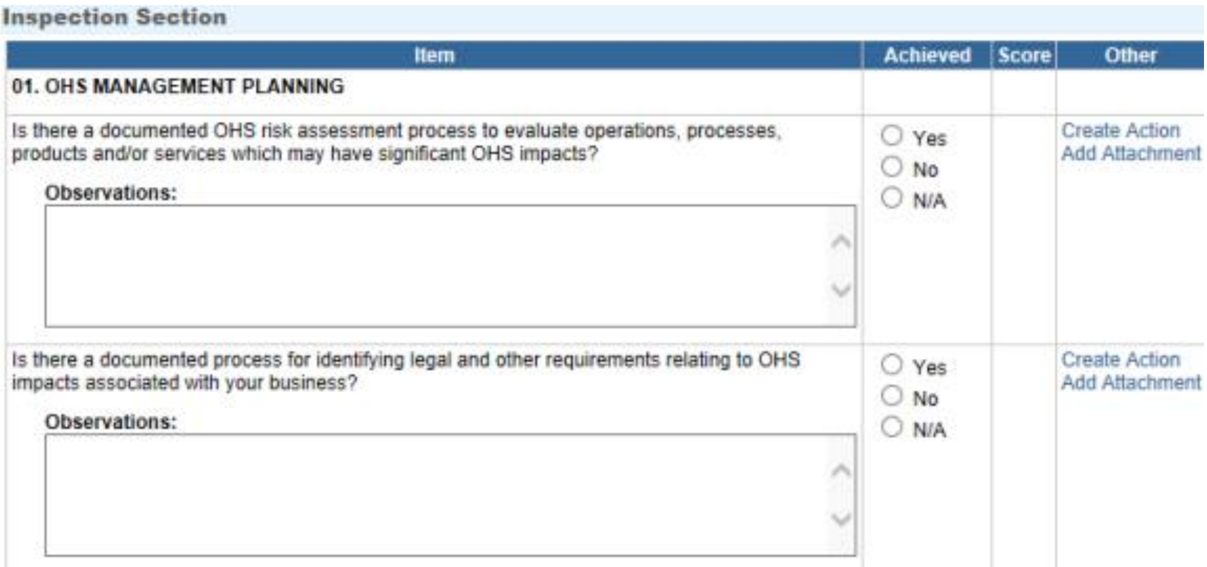


Note: The section under Hierarchy is automatically populated from the Person's Document who is creating the Inspection.

3. Enter the Date and Time for the Inspection
4. Select the Accountable person from the drop down list.
5. Select the team from the list using CTRL and left mouse click
6. Select the Type of Inspection from the drop down list.
7. Enter a Reminder Date. myosh will start sending out reminders to the Accountable Person according to the reminder date set. Note that myosh will keep sending reminders on the same day once a week until the record has been edited and the reminder date has been cleared or set to a different value.
8. Add any relevant Comments.
9. Optional – Attach any relevant documents by clicking on browse and selecting the document from the Explorer screen and click on Ok.
10. Click on the relevant choice from either:

Continue & Complete Now

1. Click on Continue & Complete now. When asked "Are you sure..." Click on Yes. The Inspection creation screen will reappear with the extra fields shown below:



Inspection Section

Item	Achieved	Score	Other
01. OHS MANAGEMENT PLANNING			
Is there a documented OHS risk assessment process to evaluate operations, processes, products and/or services which may have significant OHS impacts? Observations:	Yes No N/A		Create Action Add Attachment
Is there a documented process for identifying legal and other requirements relating to OHS impacts associated with your business? Observations:	Yes No N/A		Create Action Add Attachment

2. Either Print out this screen or Save it and go conduct the inspection and make notes of any observations made and mark what was achieved using the Legend.
3. Enter into the Inspection Document on myosh, any observations and the results by clicking in the relevant Achieved radio button and type.

4. Add any actions that need to be carried out by either clicking on Create Action next to observation or by clicking on the “Create Action” button on the Associated Actions banner. This will take myosh to the Actions database.
5. Optional – Attach any relevant documents by either clicking on Add Attachment next to observation or by clicking on browse and selecting the document from the Explorer screen and click on Ok.
6. Click on Submit and when asked “Are you sure....” click on Yes

Schedule & Send Notification

The Schedule and Send Notification is used when the Inspection Document is being sent to a different Accountable person to that person creating the Inspection Document. It notifies the accountable person via email that the Inspection is due and this is the document to use.

To send an Inspection document likes this:

1. Click on “Schedule & send notification and when asked “Are you sure....” Click on Yes

The screen will then revert back to showing the Inspection Documents Active by Month.

5. Inspection Document Scoring

Calculating the Inspection Score

The Inspection Document scoring and the overall score for the entire audit is automatically calculated once the Inspection Document has been completed and submitted.

The Section Total Possible Score is calculated by adding up the top scores for each question. Then the Section Total Possible Scores are added up to get the Grand Total Possible Score for the audit.

The Section Total Achieved Score is calculated adding up the scores for the answers. Then the Section Total Achieve Scores are added up to get the Grand Total Achieved Score.

The Percentage is calculated by the following formula:
(Achieved Score / Total Possible Score) * 100

Reviewing the Scores

To review the scores open the Active Inspection Document and the scores will appear as shown below.

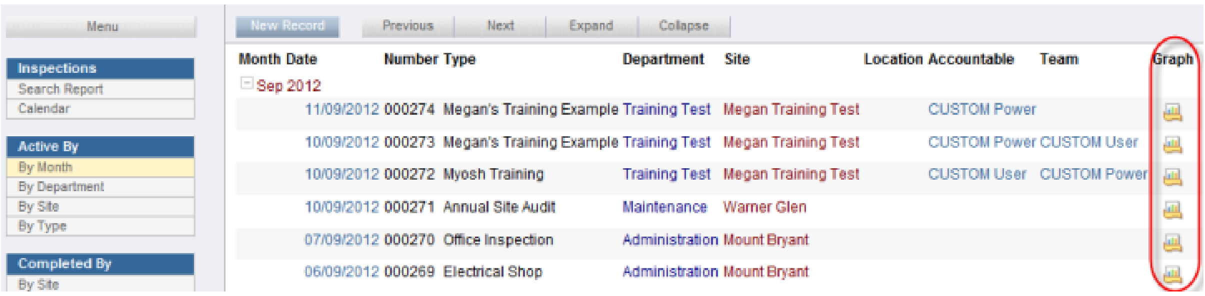
Inspection Section

Item	Achieved	Score	
Audience Survey			
How many people in this audience would consider themselves safety experts?	10 or less	1	
What are the chances of the Brisbane lions winning the AFL Grand Final	Zero	1	
Does everyone know where the fire exit is?	Yes	1	
Total:		3	
Grand Totals:		3	42.86%

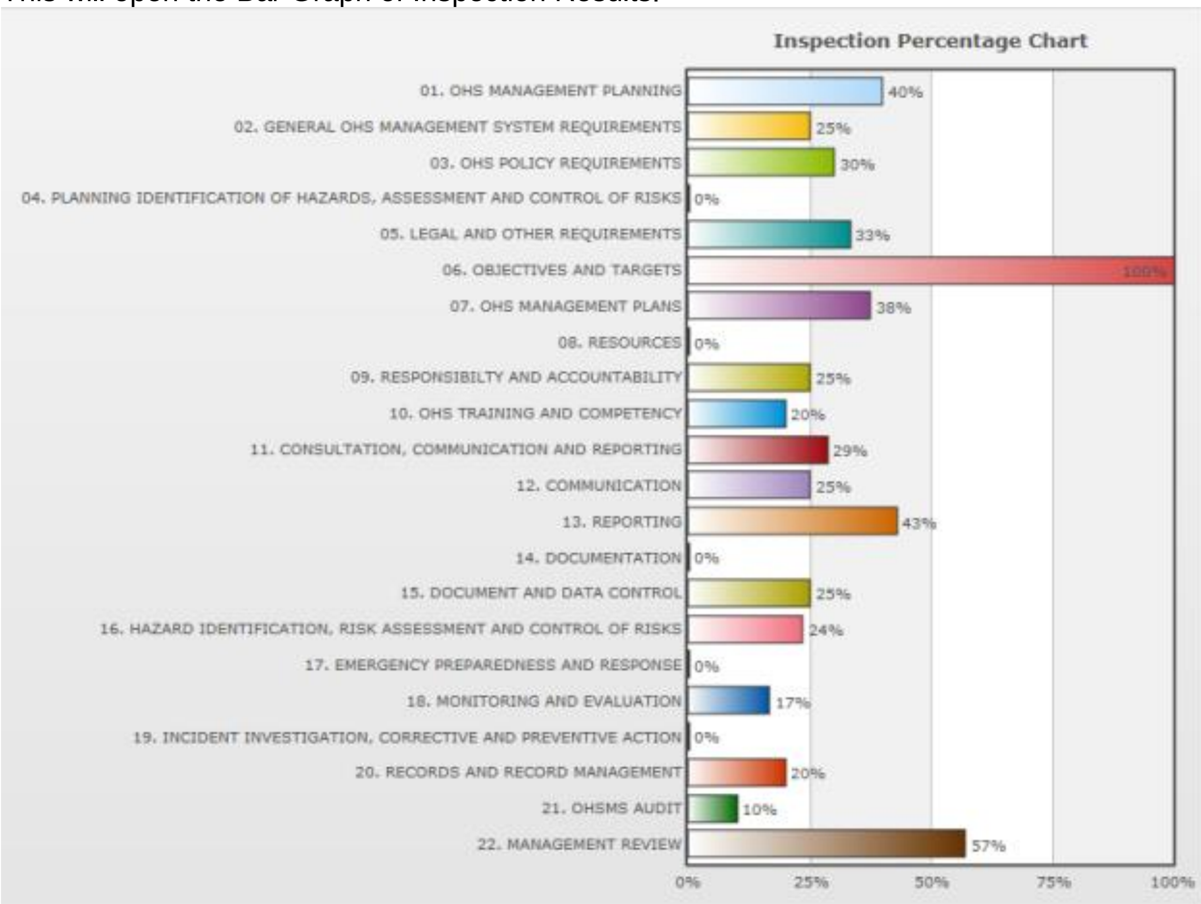
Note: If the achieved scores need to be amended, then click on the edit button, make the change, place a comment in the comments section as to why the change was made. Then click on Submit, then reopen the Inspection Document and the scores will be recalculated.

6. View Inspection Outcome as a Graph

To view a graphical representation of the Inspection outcome, click on the icons in the view prior to opening the inspection document. As shown below.



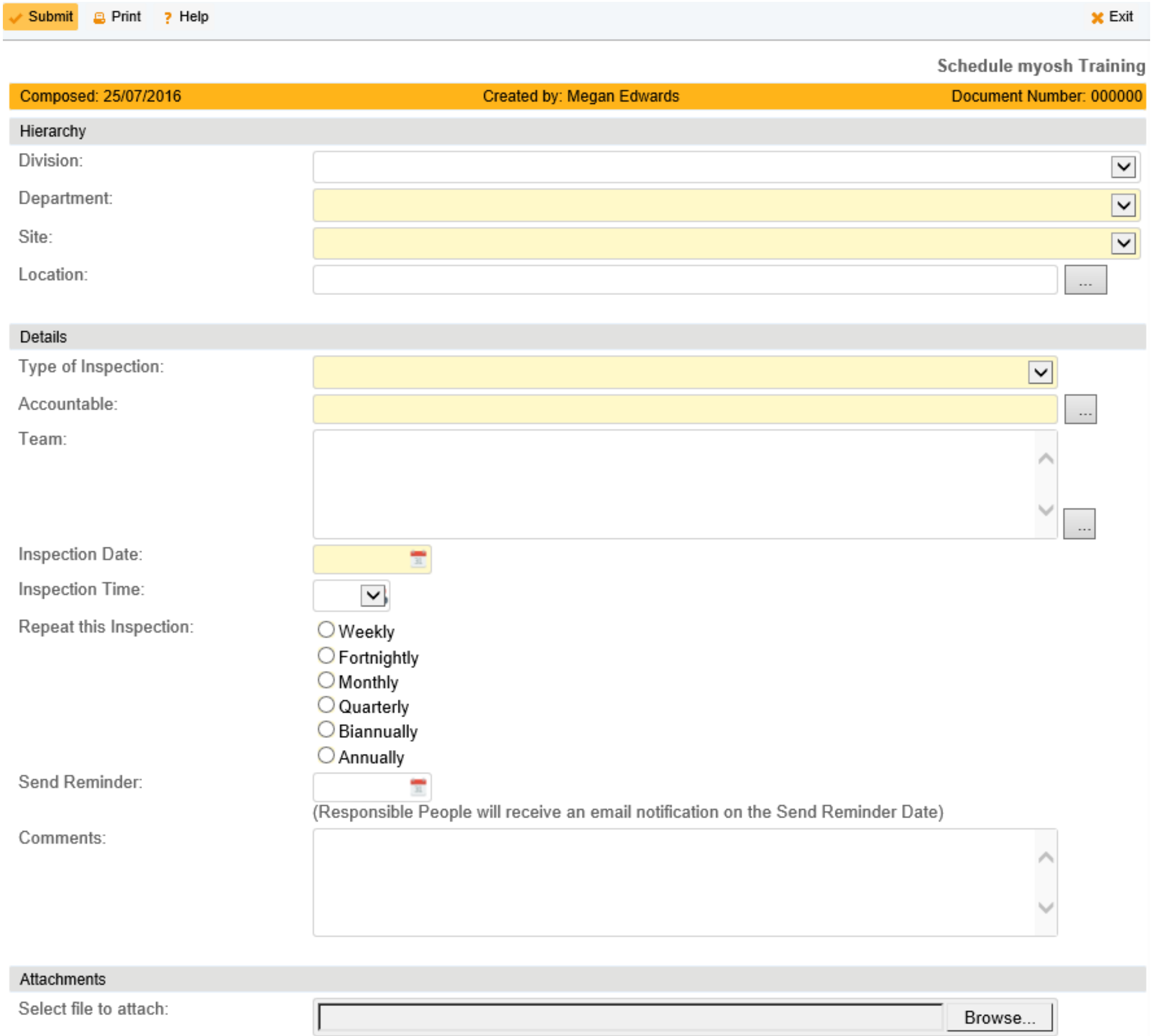
This will open the Bar Graph of Inspection Results.



8. Active Schedules

Active Schedules are the same as other inspections but provides the ability to schedule to a nominated person on an ongoing basis. To schedule an inspection:

1. Click on “Active Schedules”
2. Click on + New Record and the Scheduling Document will be displayed as shown below.



Note: The section under Hierarchy is automatically populated from the Person’s Document who is creating the Inspection.

3. Select the Type of Inspection from the drop down menu. This will determine which Inspection Document will be used for the inspection.
4. Click on ... and choose the Accountable person
5. Click on ... and choose the Team for the inspection
6. Select the Inspection Date using the calendar icon

7. Select the Inspection Time for the drop down menu
8. Click in the relevant radio button next to Repeat this Inspection
9. Select the Reminder date using the calendar icon and the responsible people will receive an email notification on the Send Reminder Date.
10. Enter any comments
11. Attach any relevant documents by clicking on Browse.
12. Click on Submit

9. Corrective Actions as a result of an Inspection

As a result of an Inspection, Corrective Actions can be generated and tracked. There are two ways to create a Corrective Action:

Observation Action – Click on the Create Action button in the Other column next to the relevant question.

Inspection Action – Click on the Create Action button at the bottom of the screen on the Associated Actions header.

This will generate an action using the Action document. A list of Open and Closed actions will appear under the Associated Actions heading. These actions will appear in the Actions module and will automatically send out reminder notifications when they become overdue

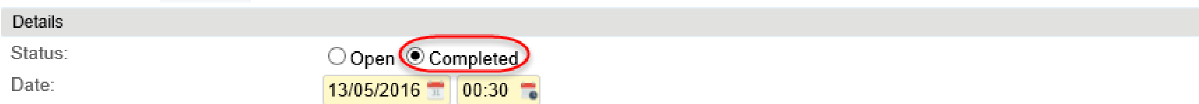
10. Hazards as a result of an Inspection

When setting up a template there is an option to include create a hazard per question, option and text. If this option is set up in the template it will then make it available to those that are conducting the Inspection. By creating a Hazard through the inspection module it is creating a link and the actual Hazard will be saved in the Hazard module.

11. Completing an Inspection

To complete an Inspection:

1. Open the Inspection that needs the status changed to Completed.
2. Click on Edit and scroll down to the Details section.



3. Click in the circle next to Completed
4. Click on Submit and when asked “Are you sure....” Click on Yes

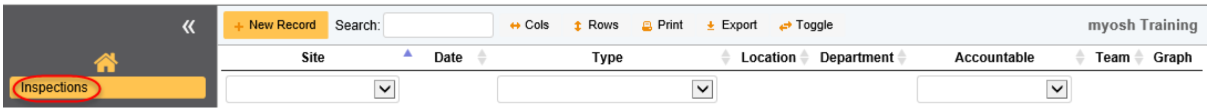
Note: This Inspection will now be able to be viewed either through a search report or when looking at “All Inspections”

12. Finding Inspections

There are numerous ways to find Inspections, they are:

- Top Menu – Searching, Filtering and Sorting
- All, Active and Archived Records displayed
- Search Report and Schedules Search
- Calendar

Top Menu Bar – Searching, Filtering, Displaying



In the display options the top menu bar can be used to search, filter and display different Inspections, as shown below:

- **Search** – Type in what you are looking for and myosh will display relevant answers
- Cols – when clicked on this will give a list of columns that can be displayed. Click in the tick box next to fields to be displayed.
- Rows – when clicked on the number of rows to be displayed can be chosen at the bottom right hand side of the page there is a section where the page can be chosen.
- Print – This allows the page to be printed
- Export – This allows the information being displayed to be exported to Excel and PDF (A4, and A3) and it also can be copied.
- Toggle – This is used to toggle the screen from being one screen to being a screen split in two.
- Triangle (up and down) these are used to sort the columns in ascending and descending.
- these are used to filter the data. Click on the arrow and select the data criteria that is needed to be displayed.

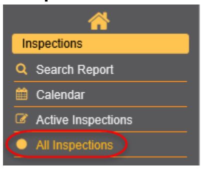
The order of these columns can be changed by Clicking on the column and dragging it and dropping it in the relevant position.

The top menu bar is used in the All, Active and Archived Records display as shown below.

All, Active and Archived Records Display

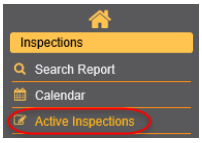
All Inspections

The All Inspections display option, allows all Inspections to be displayed. To display All Inspections, click on "All Inspections" on the navigation panel.



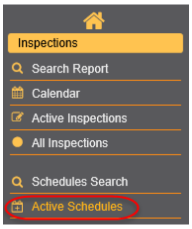
Active Inspections

The Active Inspections display option, allows all active Inspections to be displayed. To display active inspections, click on “Active Inspections” on the navigation panel.



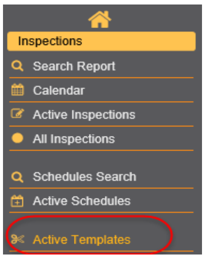
Active Schedules

The Active Schedules display option, allows all scheduled Inspections to be displayed. To display scheduled inspections, click on “Schedule Inspections” on the navigation panel.



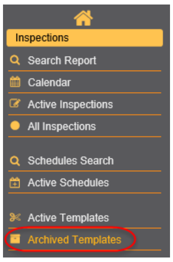
Active Templates

The Active Templates display option, allows all active templates to be displayed. To display active templates, click on “Active Templates” on the navigation panel.



Archived Templates

The Archived Templates display option, allows all archived templates to be displayed. To display archived templates, click on “Archived Templates” on the navigation panel.



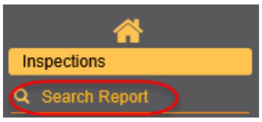
Searching for Inspections

There are two Search reports in Inspections, one for inspections and the other for scheduled inspections.

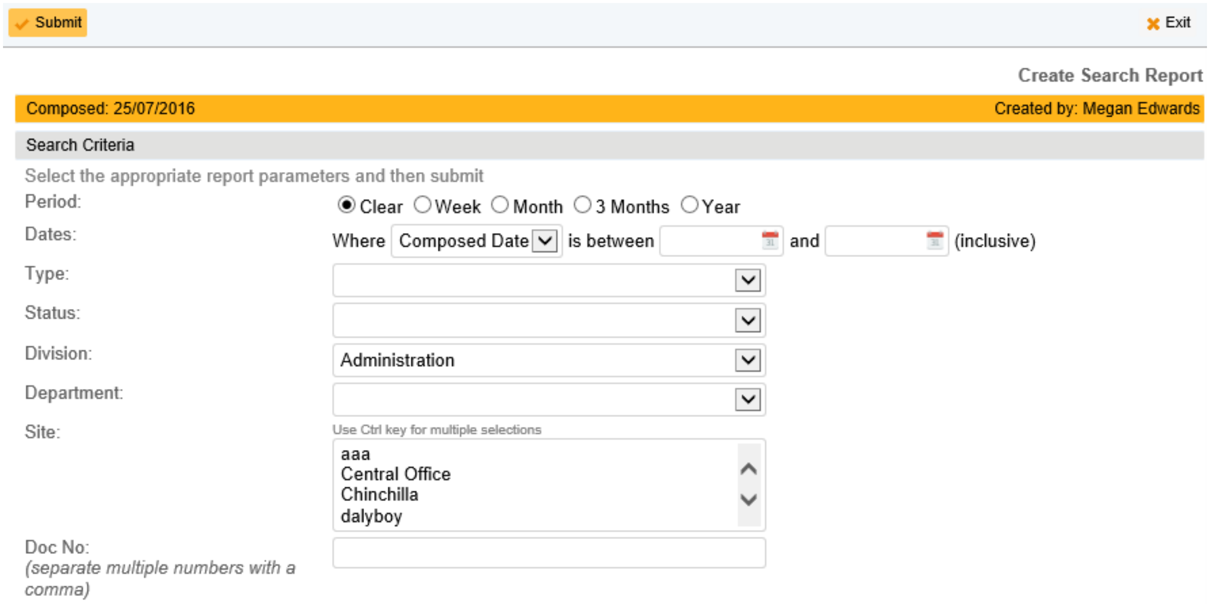
Search Report

Use the Search Report option, to find inspections with specific criteria.

1. Click on Search Report on the navigation panel

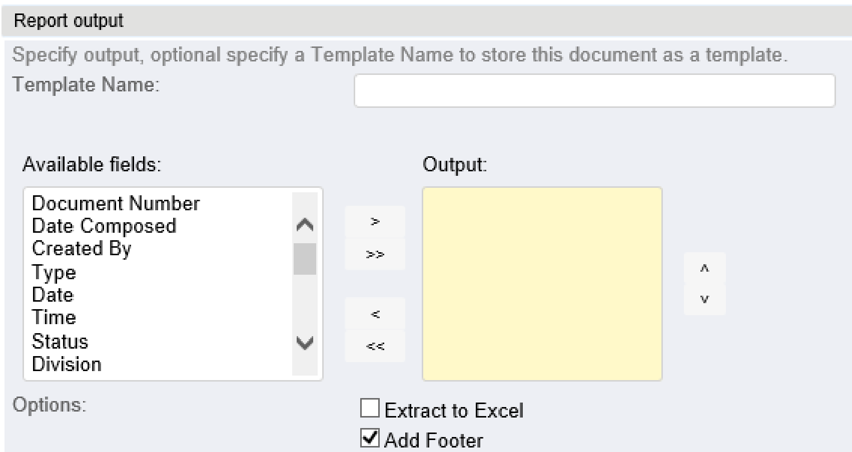


2. Click on  and the following screen will be displayed



3. Enter the Search Criteria by selecting the relevant fields by clicking in the circles or from the drop down lists

Note: To select more than one site hold down the CTRL key or Command Key and click on the relevant sites.



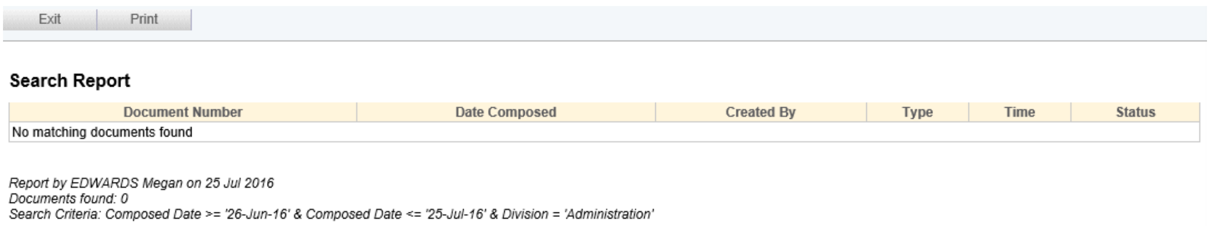
The next step of the process is to consider and select the Report Output.

Report Output Component	Description
Template Name	If this is a report that will be run on a regular basis it can be saved as template by entering a name in this field.
Available Fields	Fields that are available to be included in the report
Output	Fields that will be displayed in the report
> >> < <<	Transfer highlighted fields from Available Fields to Output Transfer all fields from Available Fields to Output Transfer highlighted fields from Output to Available Fields Transfer all fields from Output to Available Fields
up down	By highlighting a field and clicking on these buttons it will change the order of the report. Ie Click on up and the field will appear above the one it was below. Click on down and the field will appear below the one it was above.
Extract to Excel	This extracts the report to Excel. The matrix can only be extracted when the Show Dates button is ticked.
Add Footer	This adds to the footer of the report the search criteria.

4. Enter Template Name
5. Select the Available fields by clicking on them, for multiple selections hold down the CTRL key or Command key and click on each one.
6. Once highlighted click on the relevant arrow – as explained above
7. Change the order by using the up and down buttons
8. Click on Submit

Note: By including the Document Number in the report, the number becomes a hyperlink back to the original document.

The returned report will be displayed as below.


Exit Print

Search Report

Document Number	Date Composed	Created By	Type	Time	Status
No matching documents found					

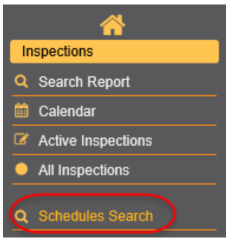
Report by EDWARDS Megan on 25 Jul 2016
Documents found: 0
Search Criteria: Composed Date >= '26-Jun-16' & Composed Date <= '25-Jul-16' & Division = 'Administration'

Note: If the returned result isn't what was required, click on the "back" button and update the search criteria and output then resubmit. The report can also be printed by clicking on "Print".

Schedules Search

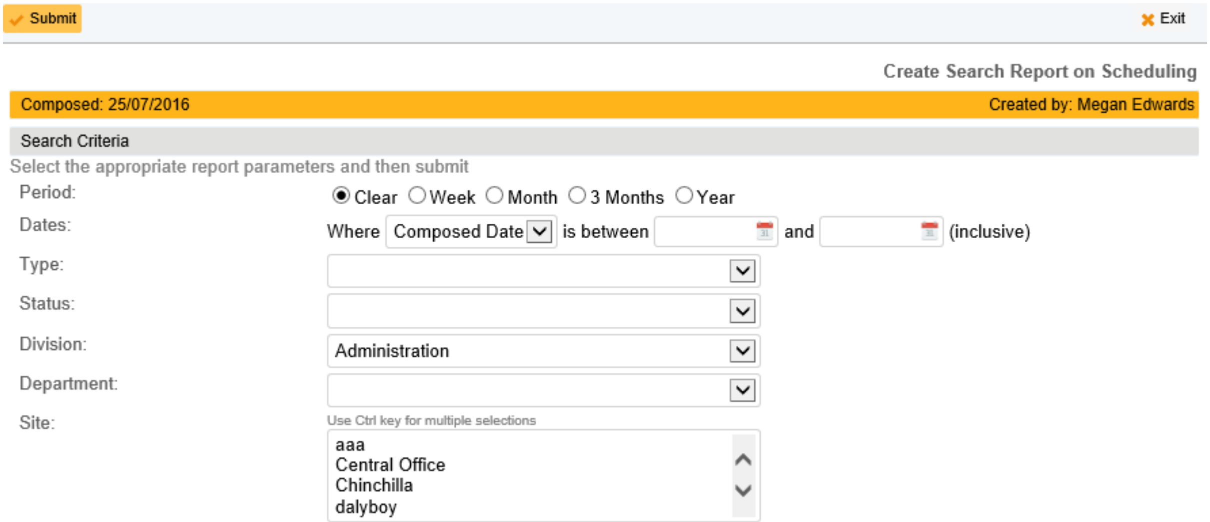
Use the Schedule Search report option, to find scheduled inspections with specific criteria.

1. Click on Schedule Search on the navigation panel



2. Click on 

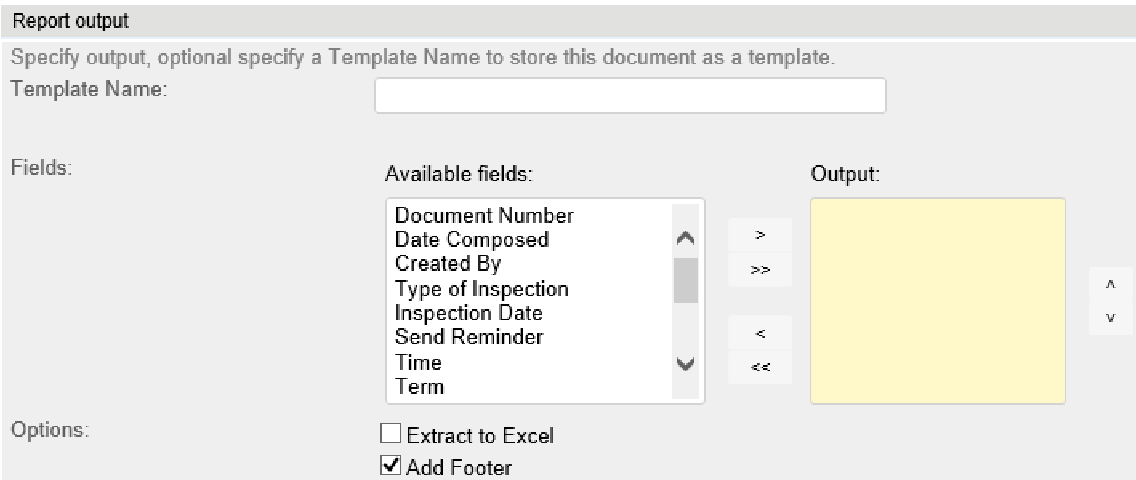
and the following screen will be displayed



3. Enter the Search Criteria by selecting the relevant fields by clicking in the circles or from the drop down lists.

Note: To select more than one site hold down the CTRL key or command key and click on the relevant sites.

The next step of the process is to consider and select the Report Output.

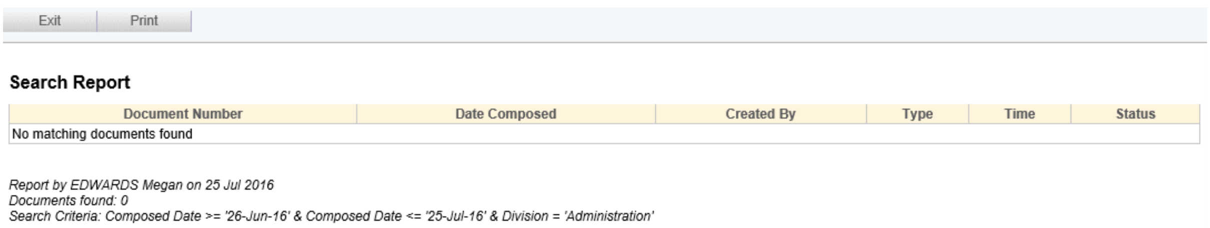


Report Output Component	Description
Template Name	If this is a report that will be run on a regular basis it can be saved as template by entering a name in this field.
Available Fields	Fields that are available to be included in the report
Output	Fields that will be displayed in the report
> >> < <<	Transfer highlighted fields from Available Fields to Output Transfer all fields from Available Fields to Output Transfer highlighted fields from Output to Available Fields Transfer all fields from Output to Available Fields
up down	By highlighting a field and clicking on these buttons it will change the order of the report. Ie Click on up and the field will appear above the one it was below. Click on down and the field will appear below the one it was above.
Extract to Excel	This extracts the report to Excel. The matrix can only be extracted when the Show Dates button is ticked.
Add Footer	This adds to the footer of the report the search criteria.

4. Enter Template Name
5. Select the Available fields by clicking on them, for multiple selections hold down the CTRL key and click on them.
6. Once highlighted click on the relevant arrow – as explained above
7. Change the order by using the up and down buttons
8. Click on Submit

Note: By including the Document Number in the report, the number becomes a hyperlink back to the original document.

The returned report will be displayed as below.


Exit Print

Search Report

Document Number	Date Composed	Created By	Type	Time	Status
No matching documents found					

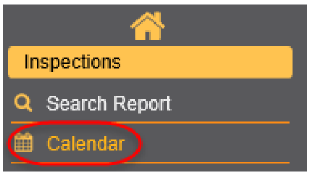
Report by EDWARDS Megan on 25 Jul 2016
Documents found: 0
Search Criteria: Composed Date >= '26-Jun-16' & Composed Date <= '25-Jul-16' & Division = 'Administration'

Note: If the returned result isn't what was required, click on the "back" button and update the search criteria and output then resubmit. The report can also be printed by clicking on "Print".

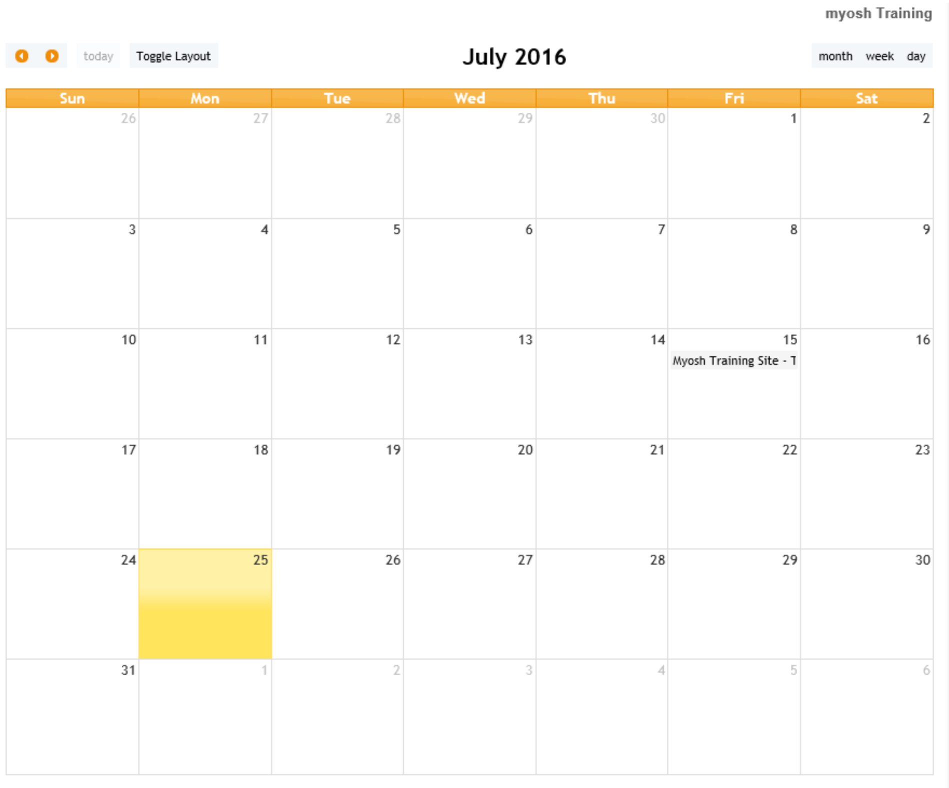
Calendar

To view the Inspection documents in a calendar format:

1. Click on Calendar under Inspections



2. The current month of inspections will be displayed as shown below



To display inspections for the week or day click on the links in the top right hand corner. To change the month, click on the arrows pointing right and left, they are on the top left hand corner.