



HSEQ Management Software

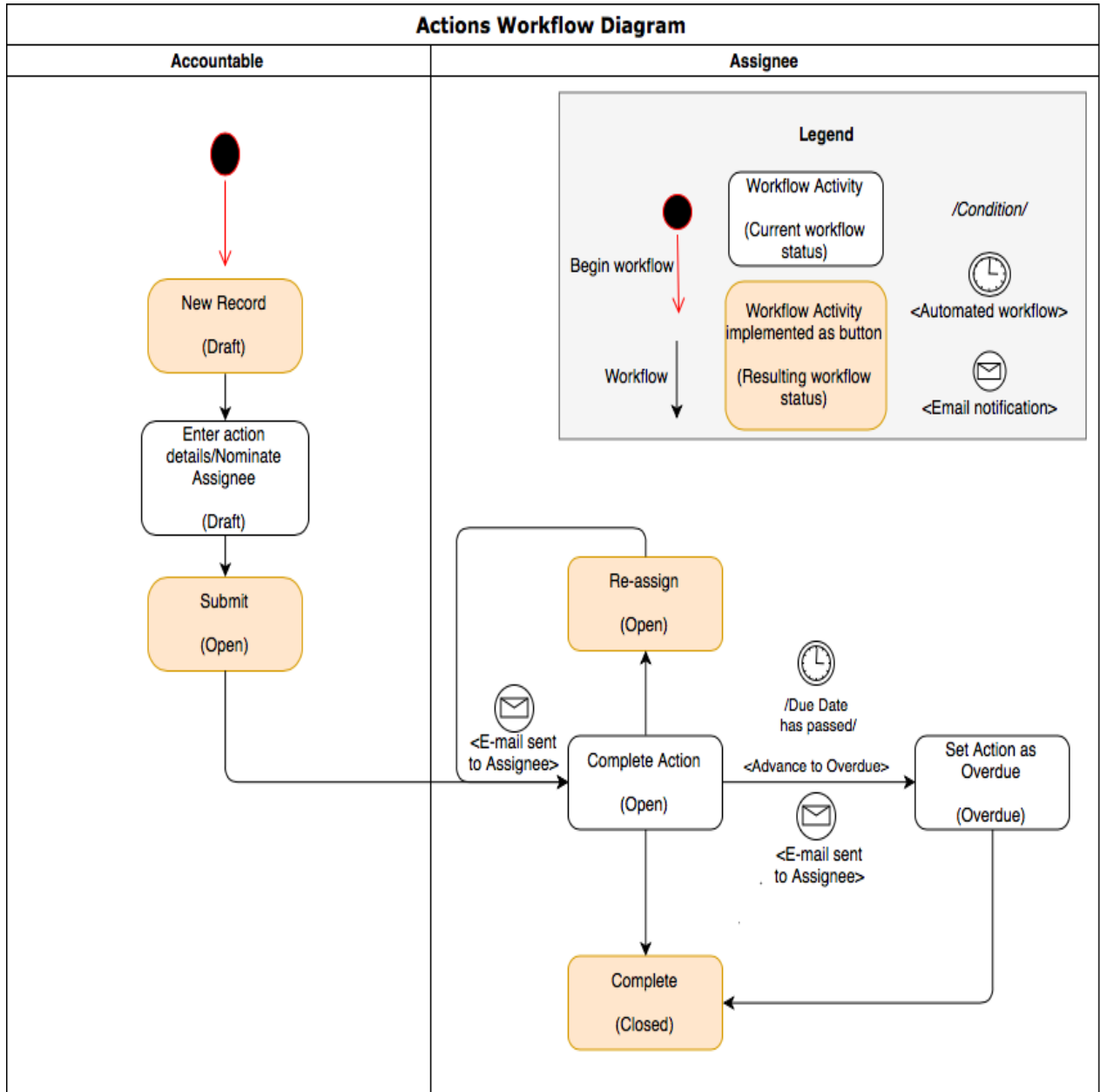
Viking Actions User Guide

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Actions Workflow



Actions Security Matrix

	User	Power User	Admin	Person action is assigned to
Create records	✓	✓	✓	
Read records	✓	✓	✓	✓
Edit records		✓	✓	
Delete records			✓	

C = Create records
R = Read records
U = Update records
D = Delete records

Open Workflow Step

	User	Power User	Admin	Injury Manager
Responsible People	C, R, U	C, R, U	C, R, U, D	C, R, U
Action Details	C, R, U	C, R, U	C, R, U, D	C, R, U
Attachments	C, R, U	C, R, U	C, R, U, D	C, R, U

Overdue Workflow Step

	User	Power User	Admin	Injury Manager
Responsible People	R, U	R, U	R, U, D	R, U
Action Details	R, U	R, U	R, U, D	R, U
Attachments	R, U	R, U	R, U, D	R, U

Closed Workflow Step

	User	Power User	Admin	Injury Manager
Responsible People	R	R	R, D	R
Action Details	R	R	R, D	R
Attachments	R	R	R, D	R

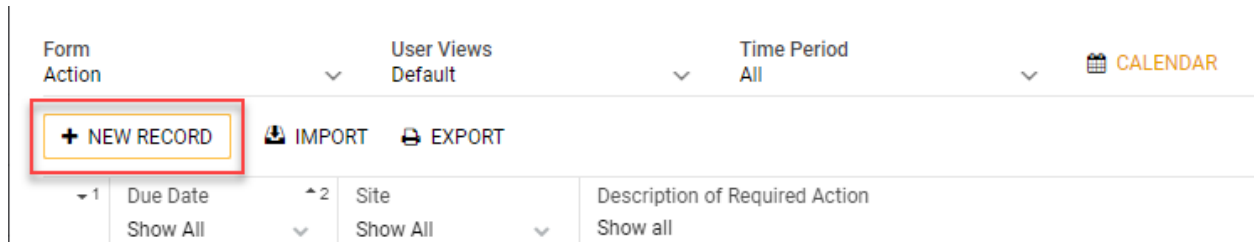
Actions

Actions can be used throughout most modules in myosh, typically they relate to compliance and non-compliance. They may also be used for task driven Actions such as managing meetings. Any Actions that are created within another module will also be available to view and edit within the Actions module.

Once the Action has been submitted, notifications will be emailed automatically to the selected people responsible for actioning the document. If Save is selected the Action will show in Draft status. Actions in Draft status need to be submitted before notifications are sent to the Accountable, Assigned to and people listed as Subscribed to Updates.

Create an Action

1. Select the **Actions** module.
2. Select **New Record**.



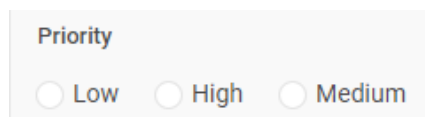
The following sections within the form will need to be completed.

Hierarchy

1. The **Hierarchy** section of the document is auto populated from the Person document that is creating the document. The hierarchy values assigned can be changed if needed.
2. Select a different value for hierarchy values if required.

Responsible People/Workflow Section

1. Select **Accountable** from the drop down menu. The Accountable person is responsible for the Action being completed.
2. Select **Assigned to** from the drop down menu. The Assigned to Person(s) is the person who will carry out.)
3. **Date Raised** will display the current date and can be changed using the Date Selector.
4. Select the **Priority** of the Action.



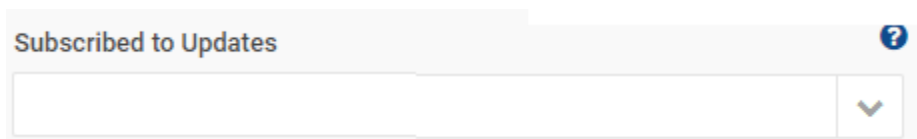
5. Select the **Due Date** from the Date Selector.

Action Details

6. Select **Action Type**. The Action types listed below are typical however there may also be other Action types available.

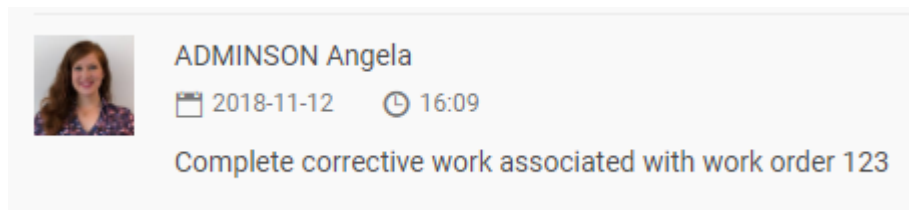
Corrective	An issue identified and the root cause is determined to prevent recurrence.
Task	Sequence of steps the must be performed effectively to maintain compliance.
Compliance	Typically the Action(s) required for permit or regulatory obligation compliance.

7. Select **Name of the Project**.
8. Enter a **Brief Description**.
9. Select a date to **Send Reminder**.
10. Select names from the list for **Subscribed to Updates**. Names selected in Subscribed to Updates will be notified of any updates to the Action. The names that receive updates can be changed at any time. Multiple names can be added.



The screenshot shows a dropdown menu titled "Subscribed to Updates" with a question mark icon in the top right corner. The dropdown is currently empty, and a downward arrow is visible on the right side of the menu box.

11. Add **History** associated with this Action e.g. details of the work required. Each time there is an update to the History the user name, date, time and details will be recorded.



The screenshot shows a history entry with a user profile picture on the left. To the right of the picture, the text reads: "ADMINSON Angela", followed by a calendar icon, "2018-11-12", a clock icon, and "16:09". Below this information, the text says "Complete corrective work associated with work order 123".

12. Attach any relevant documents by selecting **Browse** and then selecting your file, or drop the file directly into the box.
13. Select **Submit**.

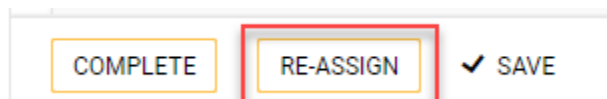
Managing Actions

An Action can be re-assigned to another person in the event of another person being responsible for it. Names can be added to the Subscribed to Updates field to receive updates each time there is a change to the Action e.g. details added. An Action status will either be Draft, Open or Closed.

Re-assigning an Action

In some circumstances it might be necessary to change the name of the person who an Action is assigned to. Once an Action has been submitted and assigned to a person, it can be re-assigned.

1. Open the Action.
2. Select **Edit**.
3. Select the person(s) to re-assign to from the **Assigned to** drop down list.
4. Select **Re-assign** Action located at the bottom of the Action form.



Subscribe to Updates

Subscribing to updates is used to give notification of an Action to others who are not listed as being Accountable or Assigned to but it is necessary for them to have updates about the Action. By selecting a person(s) in subscribe to updates section, each time there is an update to the Action an email notification is generated. Email notifications contain key information about the Action including a link to go directly to the Action. A person may remove themselves from subscribe to updates at any time by following the link.



Closing an Action

Power Users and Administrators can close Actions. Standard Users can only close actions that have been assigned to them.

1. Select the **Action** to be closed.
2. Select **Edit** at the top of the screen.
3. Select **Complete** located at the bottom of the Action form.



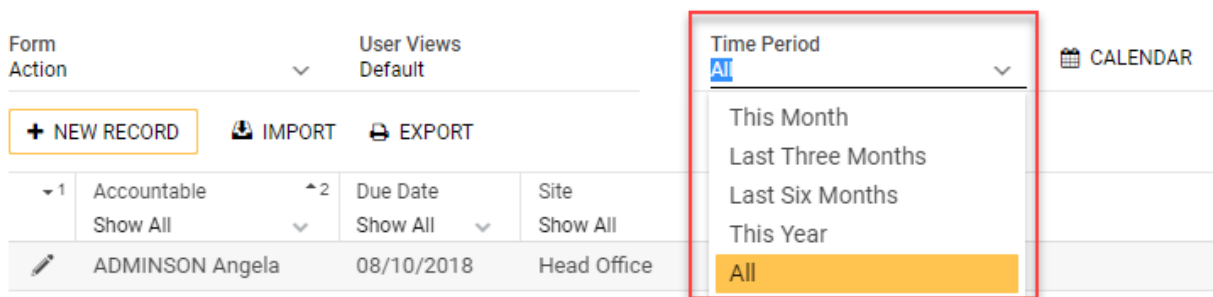
4. Select **Yes** to change the status of the Action to Closed.

Searching and Displaying an Action

There are a few options to choose from when searching Actions. The Actions module by default displays all Actions. Applying a search or using filters are an efficient tool to find the required data set.

Date Filters

If searching Actions by Date Range is required the drop down list at the top of the Action main display allows for this. List options include this month, last three months, last six months, this year and all.

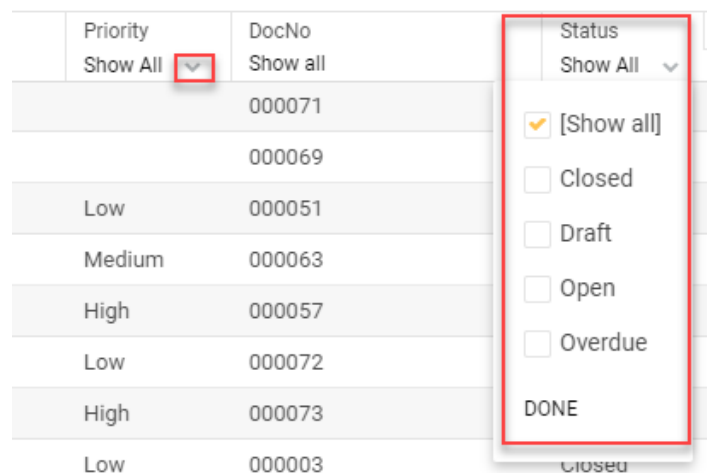


The screenshot shows the 'Time Period' dropdown menu with the following options:

- All
- This Month
- Last Three Months
- Last Six Months
- This Year

Drop Down Filter Search

Selecting the drop down menu(s) in the heading menus e.g. Accountable displays records that match filters applied. If a filter is applied for a column heading tick **Select all** or **Show all** to display all records.



The screenshot shows a table with the following data:

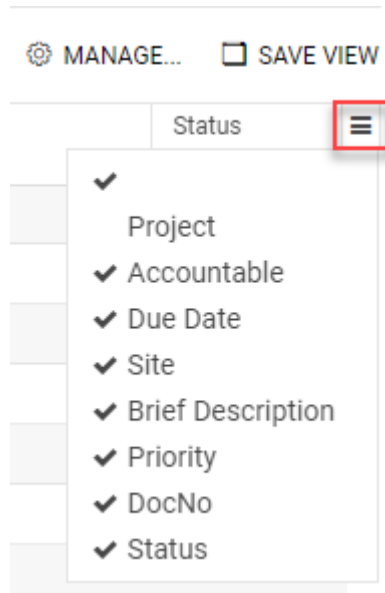
Priority	DocNo
Show All	Show all
	000071
	000069
Low	000051
Medium	000063
High	000057
Low	000072
High	000073
Low	000003

The 'Status' dropdown menu is open, showing the following options:

- [Show all]
- Closed
- Draft
- Open
- Overdue
- DONE

Customise Column Headings

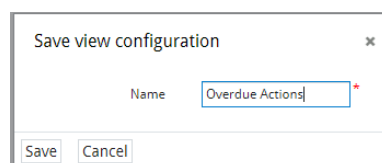
The column headings can also be changed by selecting **Settings** (highlighted below). The currently displayed headings have a circle next to the heading name. Select the heading(s) required or deselect to remove from the Actions main display.



Saving Search Views

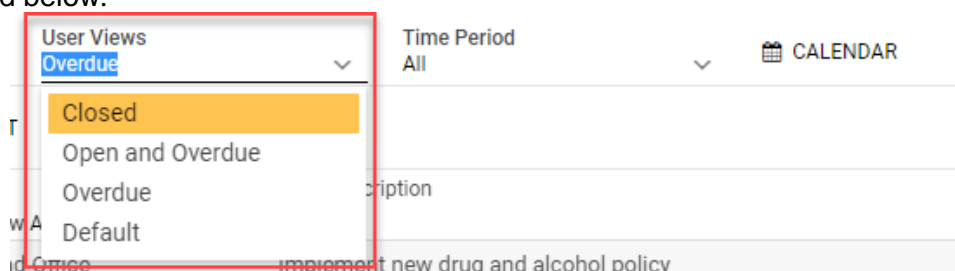
Using **Save Views** saves time so that the view can be selected with updated results displayed e.g. Open Actions. Saved views can be updated using the Manage option. Default view can be selected at any time.

1. Apply the required search or filter to the records.
2. Select **Save View**.
3. Enter a **Name** for the view e.g. Overdue Actions.



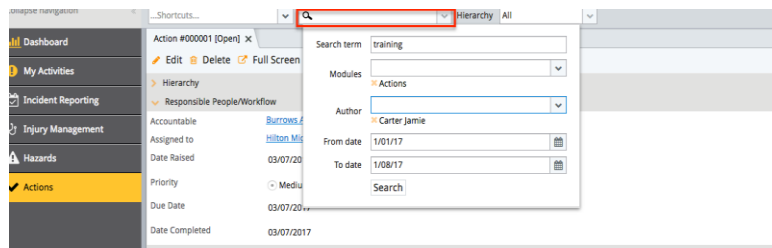
4. Select **Save**.

The saved view can now be accessed at any time by selecting the drop down menu as highlighted below.

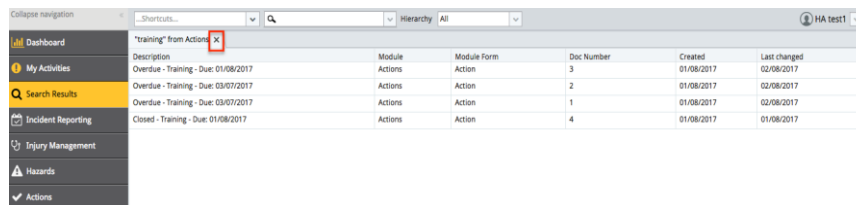


Search Results Menu

Use Search Criteria to apply a search across Modules, Author and From/To Dates. Search Criteria is selected using the magnifying glass at the top of the screen (shown below). Select **Search** to display the results.

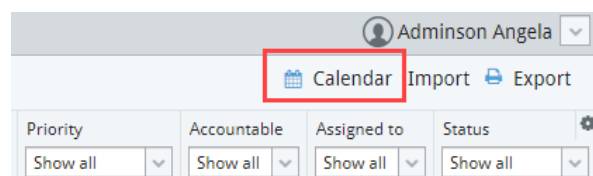


Search Results displays data relating to the specific search criteria that was entered. Search Results are accessed via the menu panel on the left side of the screen. Each time Search Criteria Options are entered the search results will be displayed in a new tab. Once the search results are no longer required they can be closed using the cross on the tab (highlighted below).

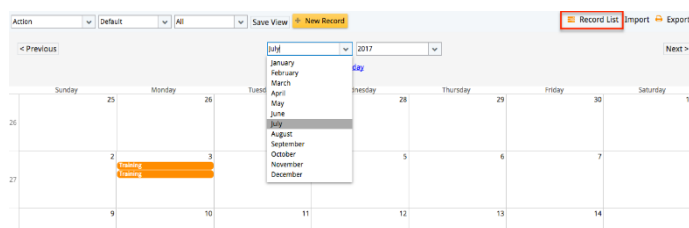


Calendar and Record List View

By default Actions are displayed as a record list. The option to change to Calendar is on the main page (shown below).



The current month will be displayed by default or use the drop down menus to change month and year. Actions are displayed against the date the Action was raised. Select **Record List** to display the records in the default list view.

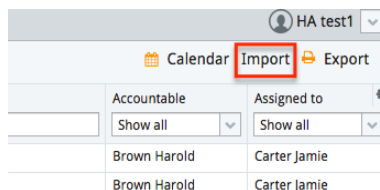


Importing and Exporting

Action records can be imported into Viking or exported to CSV, PDF or Excel file types.

Import Actions

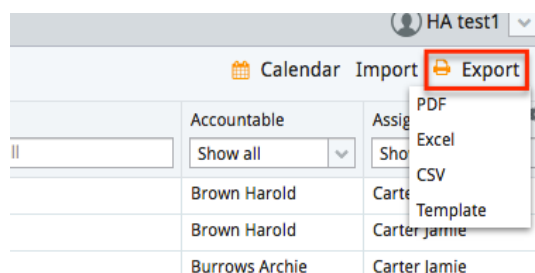
1. Select **Import**
2. Follow all of the steps to upload the Actions



3. Steps include:
 - Download and Complete the Template.
 - Select whether **Notifications** are required.
 - Browse and attach the completed Template.
 - Select **Finish**.

Export Actions

1. Select **Export**.



2. Select **PDF, Excel or CSV** (shown below).
3. Exported records can be saved, printed and emailed as required.

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