

Health & Safety Module

Trackplan's Health and Safety module can be used to assess reports and their findings as well as create reactive jobs against a finding.

To Access the Health and Safety Module, users will need to have this feature enabled by a Super User, permissions can be found in Settings – Users – User Role Manager.

To create an audit report the user will first need to create Report Types – Priority Group and Priorities, these options can be found in Settings – Health and Safety (note: to create Priorities the user will need to select the report name under the Priority Group Heading)

The Health and Safety module can be found on the left side bar and has the following sub menus:

- Audit reports
- Report findings
- Dashboard

Audit Reports:

- Create an audit report by selecting the +New
- A report will need to be given a name (mandatory field) however extra fields can be captured here as required. Upon completing these fields select the save button

Your Audit Report will now be created, from here you can:

- Create findings from the report.
- Upload documents to the report.

Audit Report Findings:

- Findings can be created using the +Create button in the Findings screen, this will take you to the "Create New Finding" page.

- This page has various headings and options available:

Observation Details:

- Here you can capture details about the finding, including the findings observation, recommendations, serious defects, etc.

Status:

- Apply a priority level against this finding and apply an "Action required date."

Asset / Location:

- Assign an Asset or site, location or sublocation to a report finding.

Asset / Location:

- This area can be used to capture information from the original supplied report, useful when asset names, locations do not match those you have on site.

Assigned To:

- Findings can be assigned to a Team or individual User.

Miscellaneous:

- Here you will find five blank fields that can be used to capture further information.

On completion of these fields, select the Save button to create a finding.

Finding Details:

From the Finding Details page a user will have options to:

- Edit, Delete or Complete a finding.
- Upload a document to a finding.
- Create a Job for the finding.

Uploading Multiple Findings:

- Multiple Findings can be uploaded by selecting the relevant report – selecting the three dots on the top right corner of the page and select Upload, This will take the user to the Upload Centre, to upload multiple findings ensure that Audit Report Findings is selected from the Upload Type dropdown menu and that the relevant Audit report is selected from the Audit Reports dropdown menu – select the spreadsheet and Upload.

Download Audit Report Findings template:

- A Template for report findings is available in the Upload Centre (Settings – Upload Centre), to download this template head to Settings – Upload Centre and select the Download Template button, from the pop-up box select “Audit Report Findings” from the Template dropdown menu and click the Download button.

Dashboard:

Trackplan provides a Dashboard for Reports and Report Findings, this can be found in the left sidebar – Health and Safety – Dashboards

The Dashboards provide a high level overview of the following:

- Number of High Priority Findings by Report – Line Chart
- Number of High Priority Findings by Report Type – Line Chart
- Audit Report summary – Grid
- Audit Report Type Summary – Grid
- Audit Report Findings by Priority – Pie Chart
- Audit Report Findings by Status – Pie Chart