University of South Australia

UniSAfe

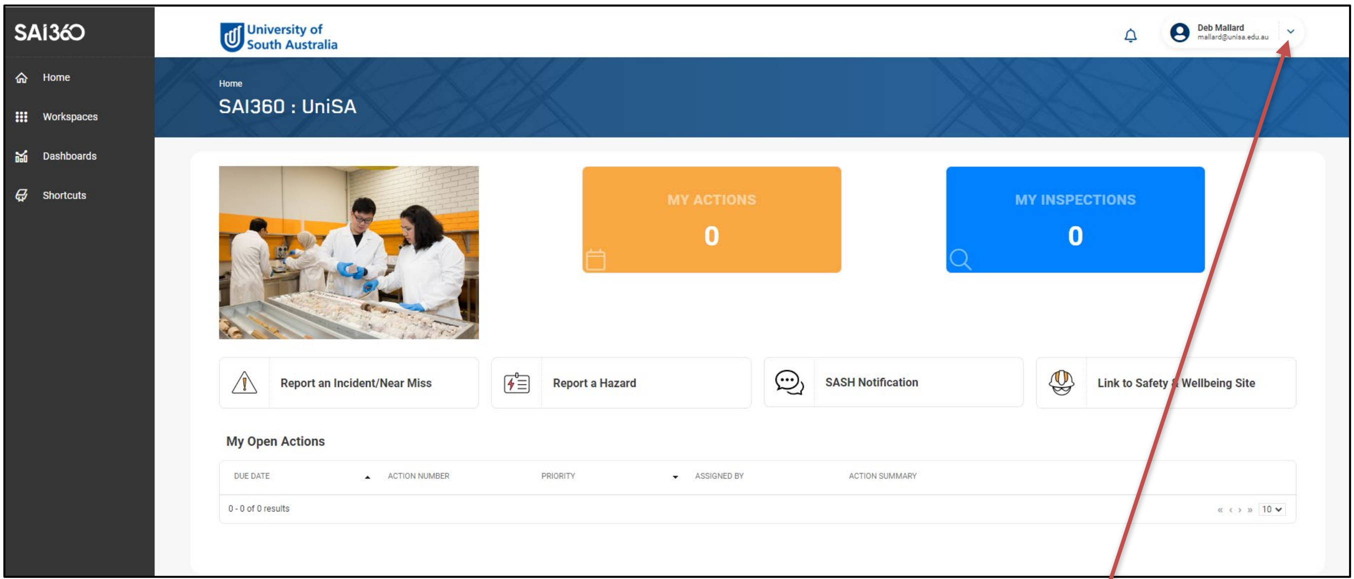
User Guide – Action Management

Module Overview: The **Action Management** module provides end users (staff and/or student) the ability to manage any actions that have resulted from a report made in the UniSAfe system.

Module Features: The **Action Management** module is an intuitive system that can be accessed via a UniSA desktop/laptop computer or via a mobile App ROAM 5 (available at all app stores) using your staff/student login.

Accessing the Module:

- Open browser and visit, https://whs.unisa.edu.au which will open your **'Dashboard'**.

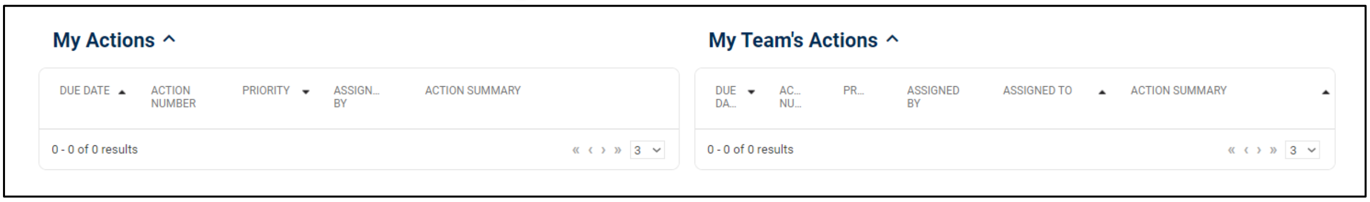


Guide to Using the Module:

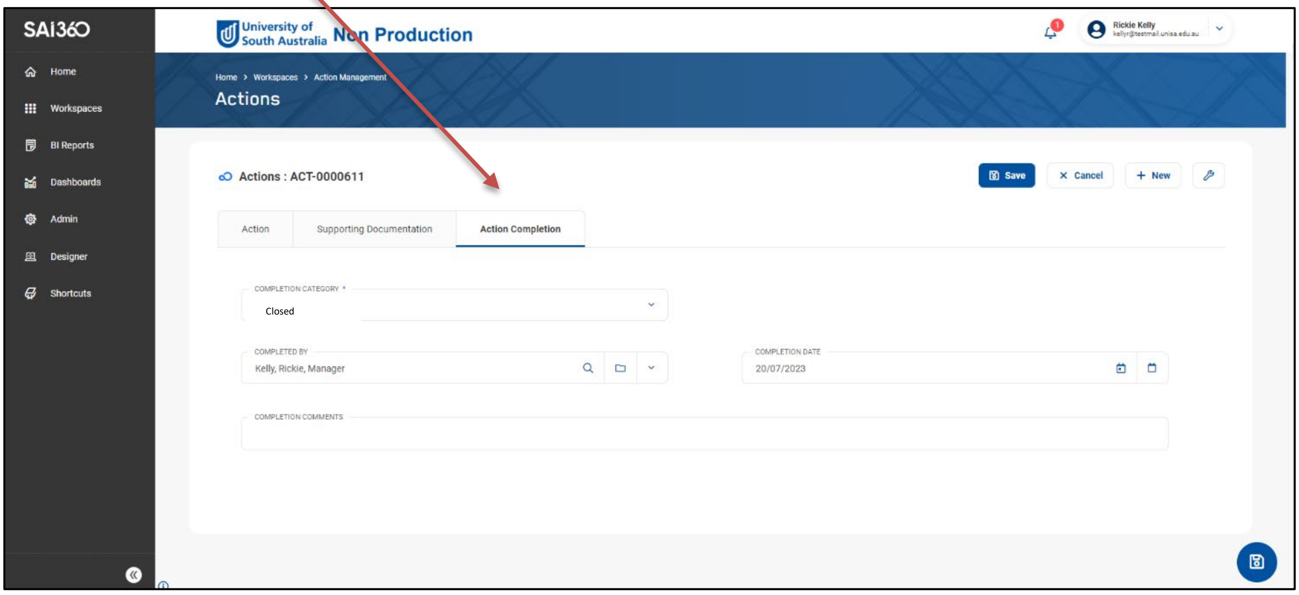
- *Additional help* - At the top of the **'Dashboard'** you will see your name with a drop down icon. On clicking this drop down icon you will see a **'Help'** option that has several resources to assist you in using UniSAfe.

Manage an Action:

- Click on the **'My Actions' or 'My Teams Actions'** box on your **'Dashboard'** which will open the form for you to complete.



- Select the **'Action'** that you need to address from the open action's fields to open up your action page.
- Click **'Action Completion'** tab, set **'Completion Category'** to **'Closed'** and **'Completion Date'** to today.



- Add any comments in to the **'Completion Comments'** section.
- Press the **'Save'** button.
- Press the **'Close'** button.

Adding a new action:

- Navigate to the **'Actions Management'** module from the **'Workspaces'** tab and press the **'Actions'** option.
- Click on **'New'** top right to add a new action.
- Assign a **'Due Date'** using the calendar option.

University of South Australia

- In the **'Assigned To'** section, assign the action to most appropriate person using the folder icon or drop down option.
- Choose the Action **'Priority'** using the drop down option.
- Summarise the action in the free text **'Action Summary'** section.
- In the **'Action Description'** section. This section provides the User the non-compulsory option to provide more detail of the action than can be provided in the **'Action Summary'** section.
- In the **'Action Progress'** section press **'+ Add New'** select the most appropriate option in the Action **'Progress Status'** field using the folder icon.
- Add comments to support this status into the **'Comments'** section then press **'OK'** to return to the previous screen.
- Click on the **'Save'** icon.
- Click on the **'Close'** icon.