

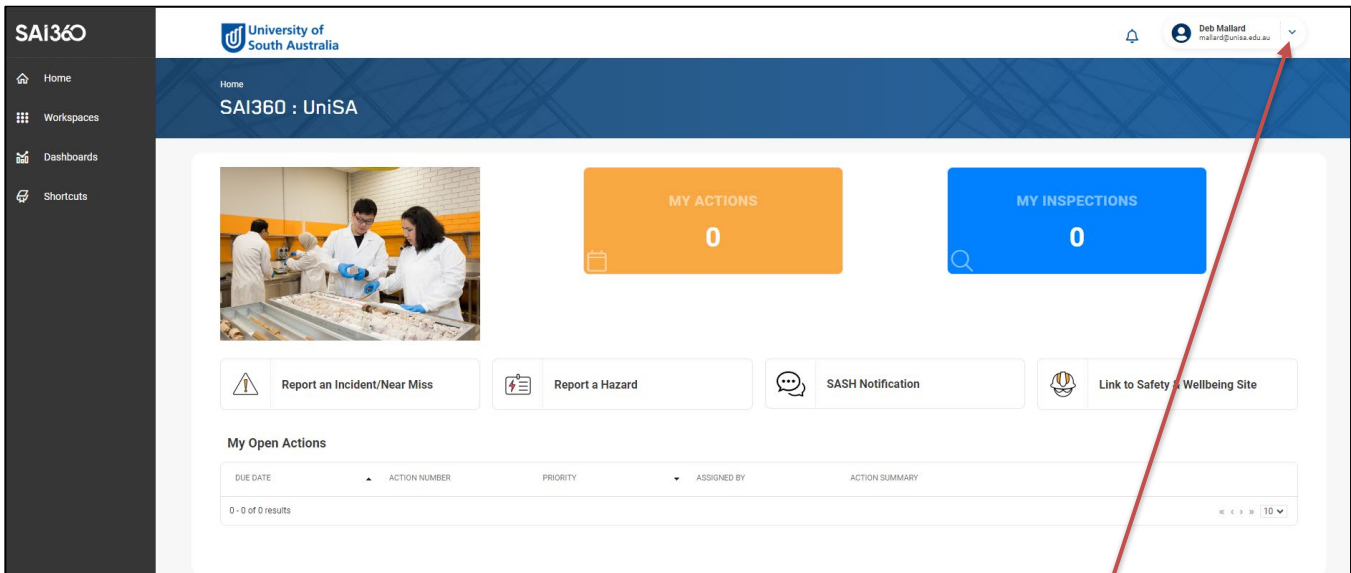
## User Guide – Action Management

**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'.



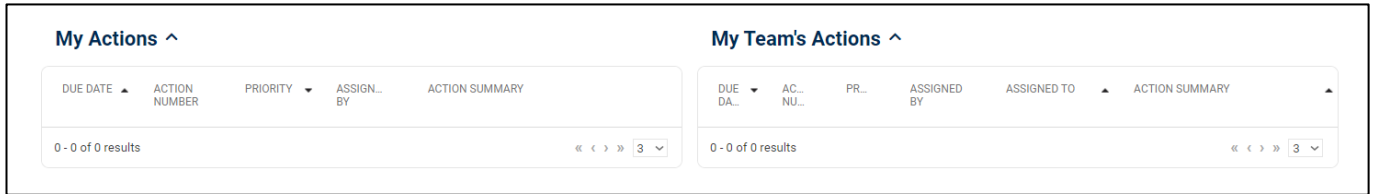
The screenshot shows the UniSAfe Dashboard interface. On the left is a dark sidebar with navigation options: Home, Workspaces, Dashboards, and Shortcuts. The main content area has a header with the University of South Australia logo and the user's name 'Deb Maltard' with a dropdown arrow. Below the header are two large cards: 'MY ACTIONS' (orange) and 'MY INSPECTIONS' (blue), both showing a count of 0. Underneath these are four action buttons: 'Report an Incident/Near Miss', 'Report a Hazard', 'SASH Notification', and 'Link to Safety & Wellbeing Site'. At the bottom, there is a table titled 'My Open Actions' with columns for DUE DATE, ACTION NUMBER, PRIORITY, ASSIGNED BY, and ACTION SUMMARY. The table currently shows 0 results.

### Guide to Using the Module:

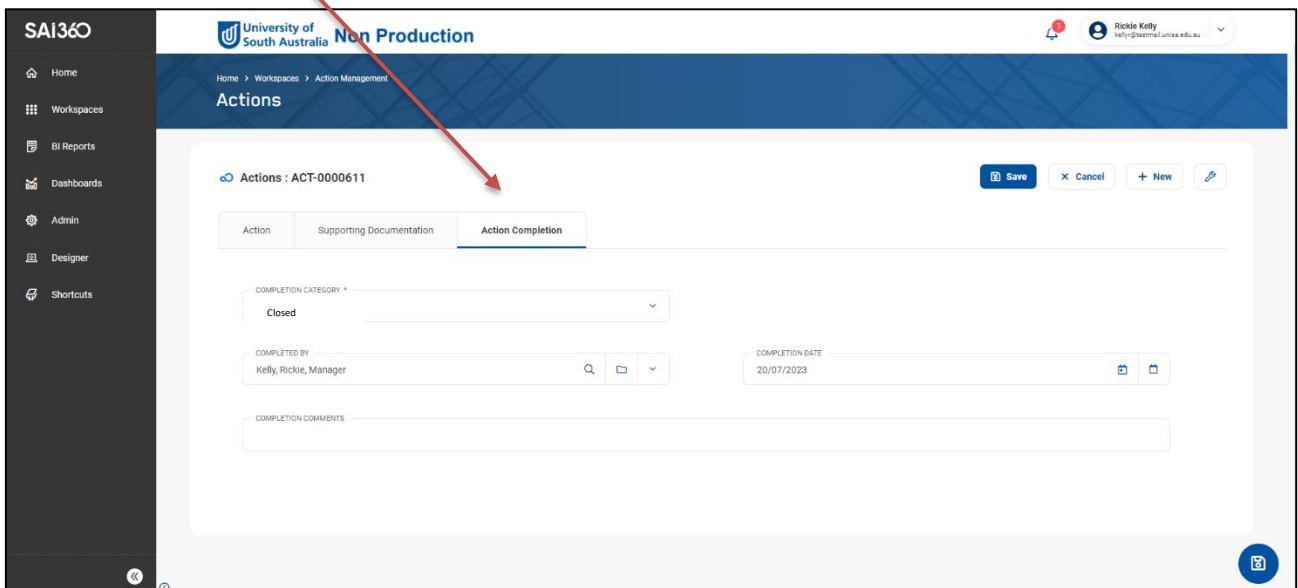
- **Additional help** - At the top of the 'Dashboard' you will see your name with a drop down icon. On clicking this drop down icon you will see a 'Help' option that has several resources to assist you in using UniSAfe.

### 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.



- 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.