



D A M S T R A

Manage Observations
Settings

Safety



[DISCLAIMER]

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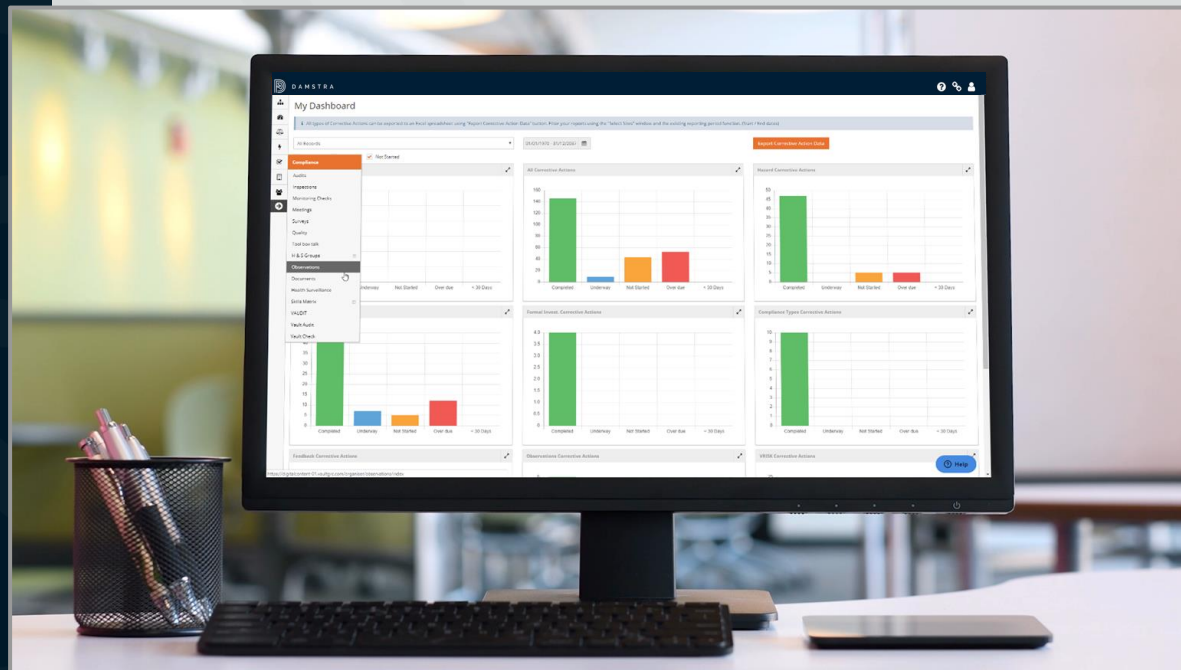
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Manage Observations Settings Introduction

In the Compliance Module, Users can view and manage Observations that have been submitted through the Notify app or Webform Portal

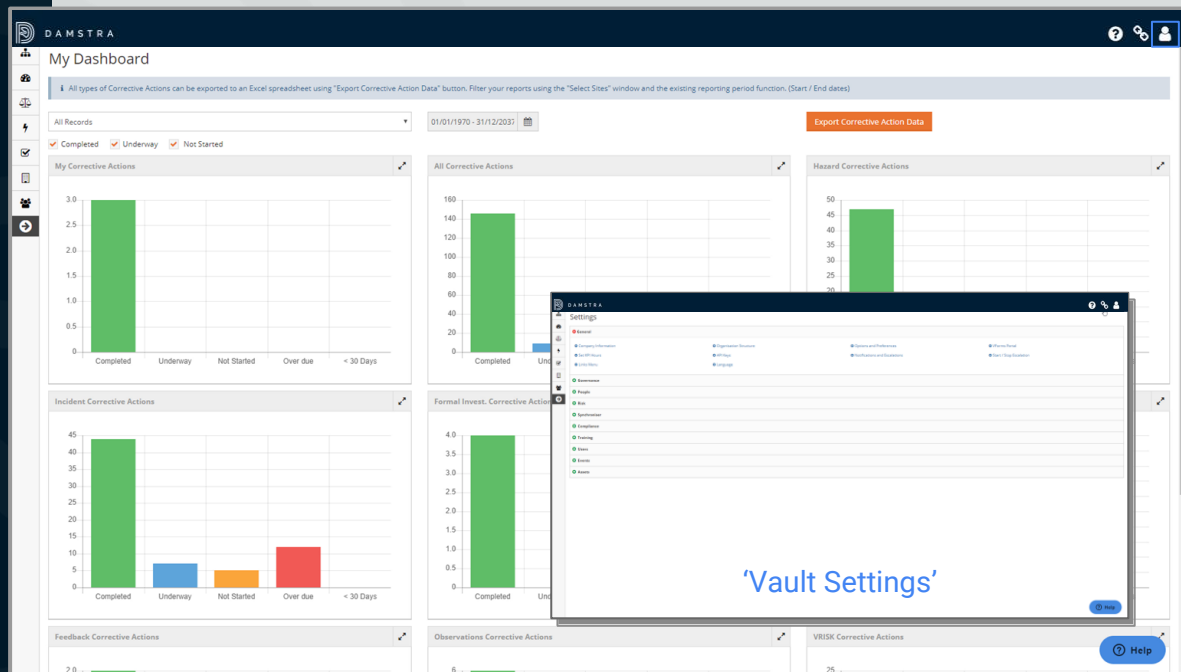
In this video, we will show how to customise the '*Categories*', and '*Classifications*' that a user can select when submitting an Observation.



Manage Observations Settings

Settings

Observation options are available in Settings, which can be found under the profile icon, towards the top of the screen.



Manage Observations Settings

Observations

Click to expand the 'Compliance' Section, then click 'Observations'.

The screenshot displays the DAMSTRA Settings interface. The left sidebar contains a navigation menu with categories: General, Governance, People, Risk, Synchroniser, Compliance (highlighted with a blue box), Training, Users, Events, and Assets. The main content area shows the 'Settings' page with sub-sections: General (Company Information, Set KPI Hours, Links Menu, Organisation Structure, API Keys, Language, Options and Preferences, Notifications and Escalations, IForms Portal, Start / Stop Escalation), Governance, People, Risk, Synchroniser, Compliance (expanded to show 'Observations' with a blue box), Training, Users, Events, and Assets. A smaller inset window in the bottom right shows the same interface with the 'Observations' sub-section highlighted. A 'Help' button is visible in the bottom right corner of the main interface.

Manage Observations Settings

Observations cont.

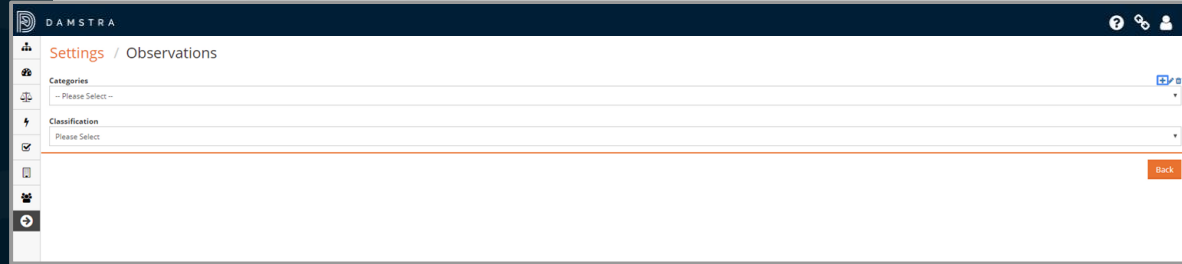
Categories and Classifications are displayed as pick-lists, with the available options contained within.

The screenshot shows the 'Settings / Observations' page in the DAMSTRA application. The page has a dark blue header with the DAMSTRA logo and user profile icons. Below the header, the page title 'Settings / Observations' is displayed. There are two pick-lists: 'Categories' and 'Classification', both showing 'Please Select'. A 'Back' button is located in the top right corner, and a 'Help' button is in the bottom right corner. The interface includes a sidebar with navigation icons and a top header with the DAMSTRA logo and user profile icons.

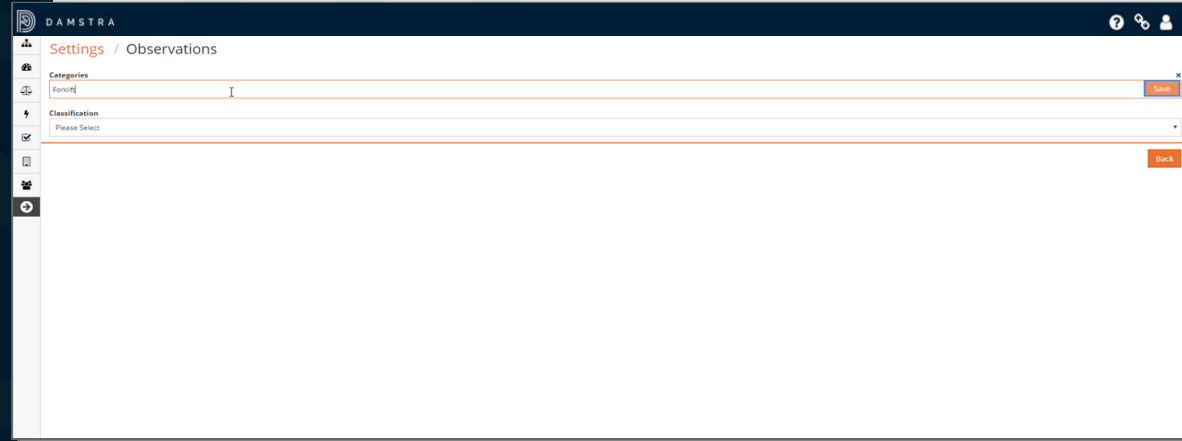
Manage Observations Settings

Add a Category

To add a new Category, **click** the '+' icon, and **type** the name of the new Category. Then, **click** 'Save'.



The screenshot shows the 'Settings / Observations' page in the DAMSTRA application. The 'Categories' field is currently empty and displays a '+' icon on the right side, indicating the option to add a new category. The 'Classification' field is set to 'Please Select'. A 'Back' button is visible in the bottom right corner.

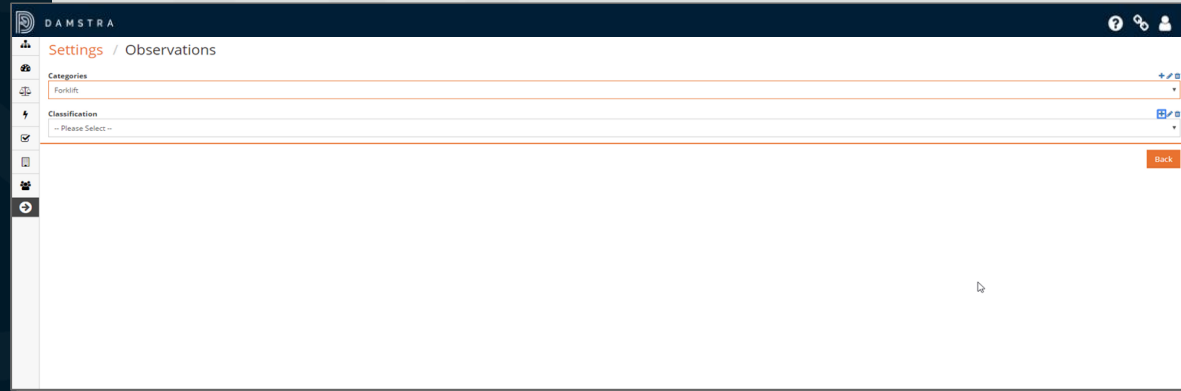
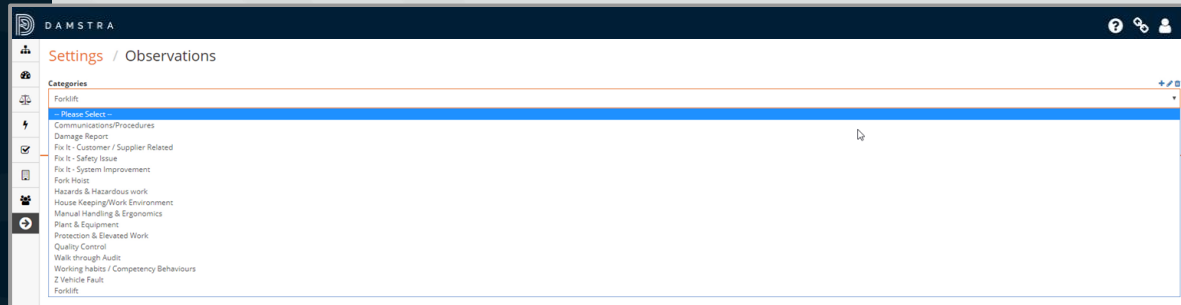


The screenshot shows the 'Settings / Observations' page in the DAMSTRA application. The 'Categories' field now contains the text 'Forking'. A 'Save' button is visible on the right side of the field. The 'Classification' field is still set to 'Please Select'. A 'Back' button is visible in the bottom right corner.

Manage Observations Settings

Add a Classification

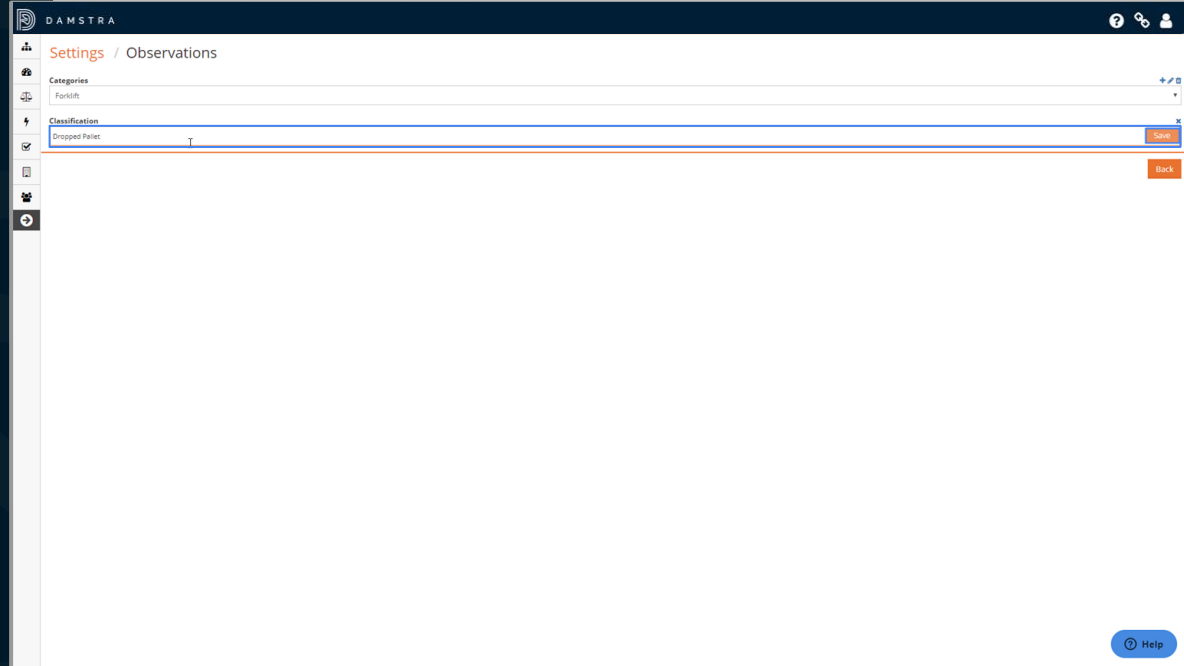
To add a new Classification, first **select** your desired Category.
Then, **click** the '+' icon.



Manage Observations Settings

Add a Classification cont.

Type the name of the new Classification, then **click** 'Save'.



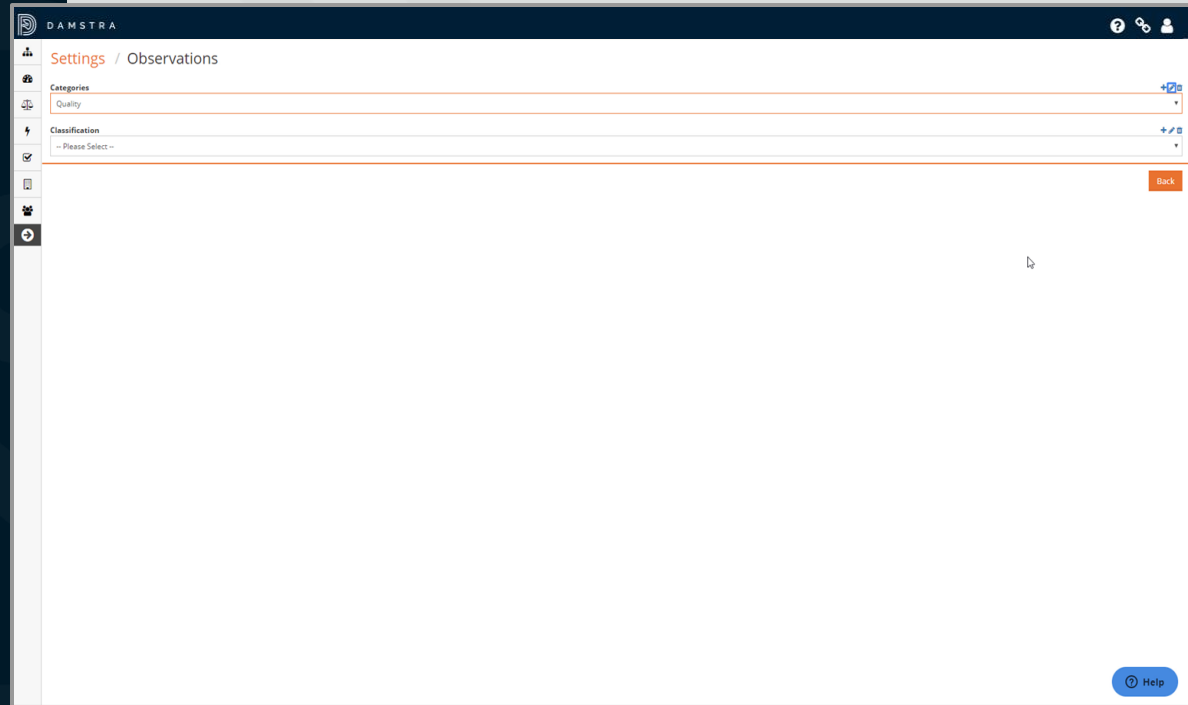
The screenshot shows the DAMSTRA application interface. The top navigation bar includes the DAMSTRA logo, a search icon, and a user profile icon. The main header displays 'Settings / Observations'. Below this, there are sections for 'Categories' (with a 'Forklift' entry) and 'Classification'. The 'Classification' section features a text input field containing 'Dropped Palett' and a 'Save' button. A 'Back' button is located at the bottom right of the form area. A 'Help' button is visible in the bottom right corner of the application window.

Manage Observations Settings

Edit a Category or Classification

To edit an existing Category or Classification, **select** the desired item from the picklist.

Then, **click** the 'edit' icon.



Manage Observations Settings

Edit a Category or Classification cont.

Type the name, then **click** 'Save'.

DAMSTRA

Settings / Observations

Categories

Quality Control

Classification

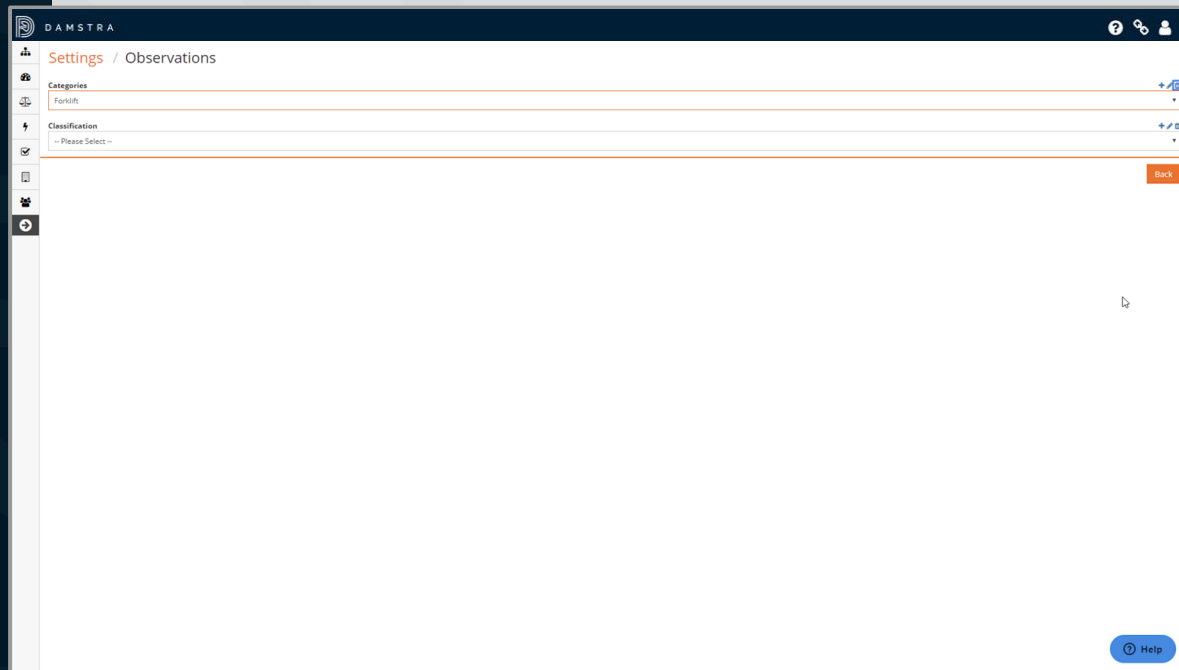
-- Please Select --

Help

Manage Observations Settings

Delete a Category or Classification

To delete a Category or Classification, first **select** the item from the pick-list and **click** the *'Delete'* icon.



Manage Observations Settings

Delete a Category or Classification cont.

Click 'Yes' to confirm.

Deleting a Category will delete any Classifications below it.

Note that this change is permanent and cannot be undone.

