



D A M S T R A

Manage Mandatory
Events Fields

Safety

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Manage Mandatory Events Fields

Introduction

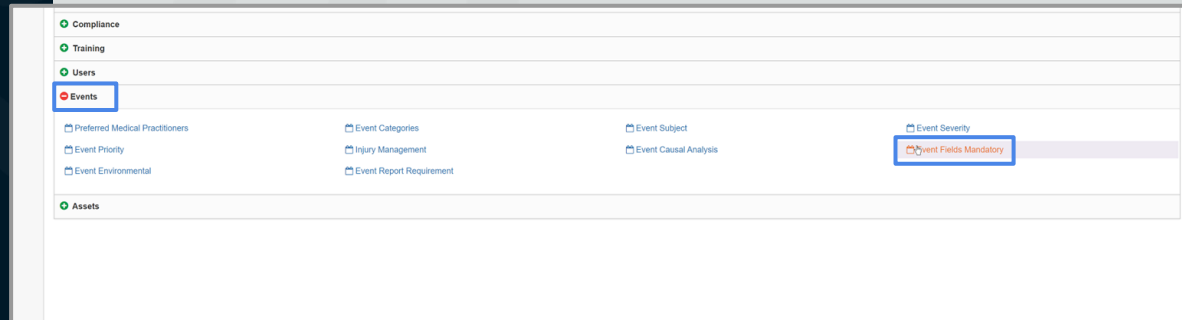
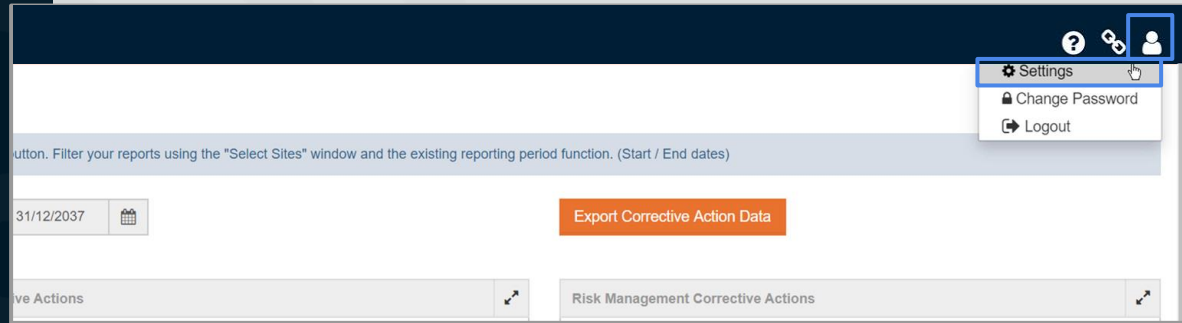
Because every business manages Events in a slightly different way, Damstra Safety supports the ability for your Organisation to determine which Event information is mandatory, so that required information is always captured, while additional information can still be captured where relevant.



Manage Mandatory Events Fields Settings

This is managed via Settings, which can be found under the profile icon toward the top of the screen.

Click to expand 'Events', then **click** 'Event Fields Mandatory'.



Manage Mandatory Events Fields

Event Mandatory Fields

In the 'Event Mandatory Fields' section, fields that can be configured as either optional or mandatory are displayed in a table and listed via Event Type.

Simply **check** a field to make it mandatory, or **uncheck** to make it optional.

In this example, the field 'Case Number' is marked as mandatory for Injury and Illness events, but left optional for Incidents and Near Misses.

Settings / Event Fields Mandatory

Custom Event / Near Miss Naming

Event: incident

Near Miss: Near Miss

Event Mandatory Fields

Use the checkboxes to select functions that are mandatory for the Event form. The checkboxes are either mandatory for saving the form or are mandatory for making the Event status Completed.
Note: The Mandatory fields only apply to the main Event form and do not affect the Portal form (VFORMS)

| | Injury | Illness | Incident | Near Miss |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Case Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Category | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Severity | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Injury Description | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Management Review for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Actual Event Outcome for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Potential Event Outcome for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hide Milestone Timer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hide Priority | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Minimum Sensitive Users * 1

Notify Sensitive Users when a Sensitive Event is updated

Notify Sensitive Users when a corrective action is updated for a Sensitive Event

Mandatory fields that apply only when Investigation is required

Help

Manage Mandatory Events Fields

Event Mandatory Fields cont.

Additionally, The 'Milestone Timer' feature and 'Priority' option and rating may be hidden altogether for chosen Event types.

Note that fields that are solid grey do not apply to that Event type and cannot be checked.

Settings / Event Fields Mandatory

Custom Event / Near Miss Naming

Event:

Near Miss:

Event Mandatory Fields

Use the checkboxes to select functions that are mandatory for the Event form. The checkboxes are either mandatory for saving the form or are mandatory for making the Event status Completed.

Note: The Mandatory fields only apply to the main Event form and do not affect the Portal form (VFORMS)

| | Injury | Illness | Incident | Near Miss |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Case Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Category | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Severity | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Injury Description | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Management Review for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Actual Event Outcome for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Potential Event Outcome for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hide Milestone Timer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hide Priority | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Minimum Sensitive Users *

Notify Sensitive Users when a Sensitive Event is updated

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Mandatory fields that apply only when Investigation is required

[Help](#)

Manage Mandatory Events Fields


Sensitive Event Options



If you'd like a particular number of Sensitive Users to be given visibility of Sensitive Events when reported, **enter** the minimum number here.

Note that once set, anybody reporting a Sensitive Event must select at least that number of Sensitive Users before they are able to submit it.

If you'd like the sensitive users to be notified when an Event they have visibility of or a related corrective action is updated, **tick** the relevant checkboxes.

| | | | |
|--|-------------------------------------|-------------------------------------|--------------------------|
| Injury Description | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Management Review for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Actual Event Outcome for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Potential Event Outcome for Completion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hide Milestone Timer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hide Priority | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Minimum Sensitive Users * 

Notify Sensitive Users when a Sensitive Event is updated

Notify Sensitive Users when a corrective action is updated for a Sensitive Event

Mandatory fields that apply only when Investigation is required

| | Injury | Illness | Incident |
|---------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Show Investigation not required | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigator Assigned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Status | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Date Assigned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Date Due | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Causal Analysis For Completion | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Findings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Manage Mandatory Events Fields

Standard Investigation Fields

The options in the lower half of the screen relate to fields found in the Standard Investigation tab.

In addition to selecting mandatory fields, select whether the 'Investigation not required' checkbox should be available for selection and whether your system should automatically notify the assigned investigator using the drop-down field.

| | Injury | Illness | Incident | Near Miss |
|-----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Show Investigation not required | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigator Assigned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Status | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Date Assigned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Date Due | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Causal Analysis For Completion | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Findings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Corrective Actions For Completion | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Manage Mandatory Events Fields

Standard Investigation Fields cont.

- 'Manual': a checkbox is displayed in the Event form when an investigator is assigned. If checked, the investigator is notified automatically as soon as the form is saved. If left unchecked, no email is sent.
- 'Automatic': no checkbox displayed. The investigator is always notified.
- 'Never send': no checkbox is displayed, no notification sent to the investigator.

Injury Description

Management Review for Completion

Actual Event Outcome for Completion

Potential Event Outcome for Completion

Hide Milestone Timer

Hide Priority

Minimum Sensitive Users

Notify Sensitive Users when a Sensitive Event is updated

Notify Sensitive Users when a corrective action is updated for a Sensitive Event

Mandatory fields that apply only when investigation is required

| | Injury | Illness | Incident | Near Miss |
|-----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Show Investigation not required | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigator Assigned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Status | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Date Assigned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Investigation Date Due | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Causal Analysis For Completion | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Findings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Corrective Actions for Completion | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Notify investigator

Save Cancel

Help

