



D A M S T R A

Manage Compliance
Types

Safety



[DISCLAIMER]

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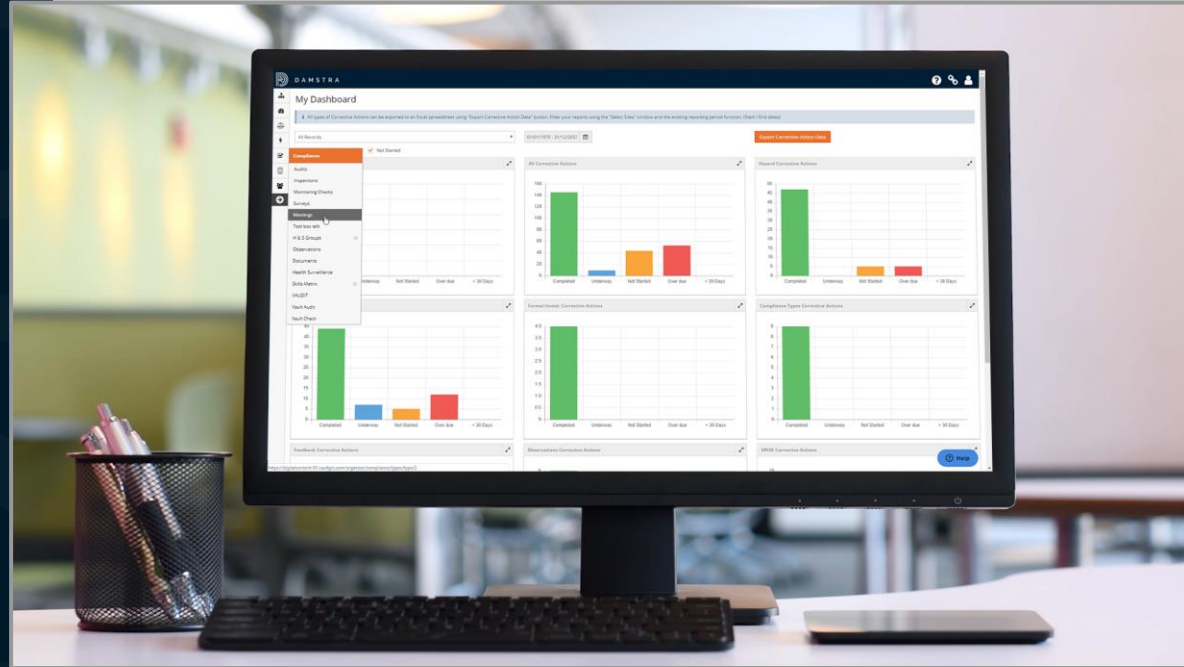
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Manage Compliance Types Introduction

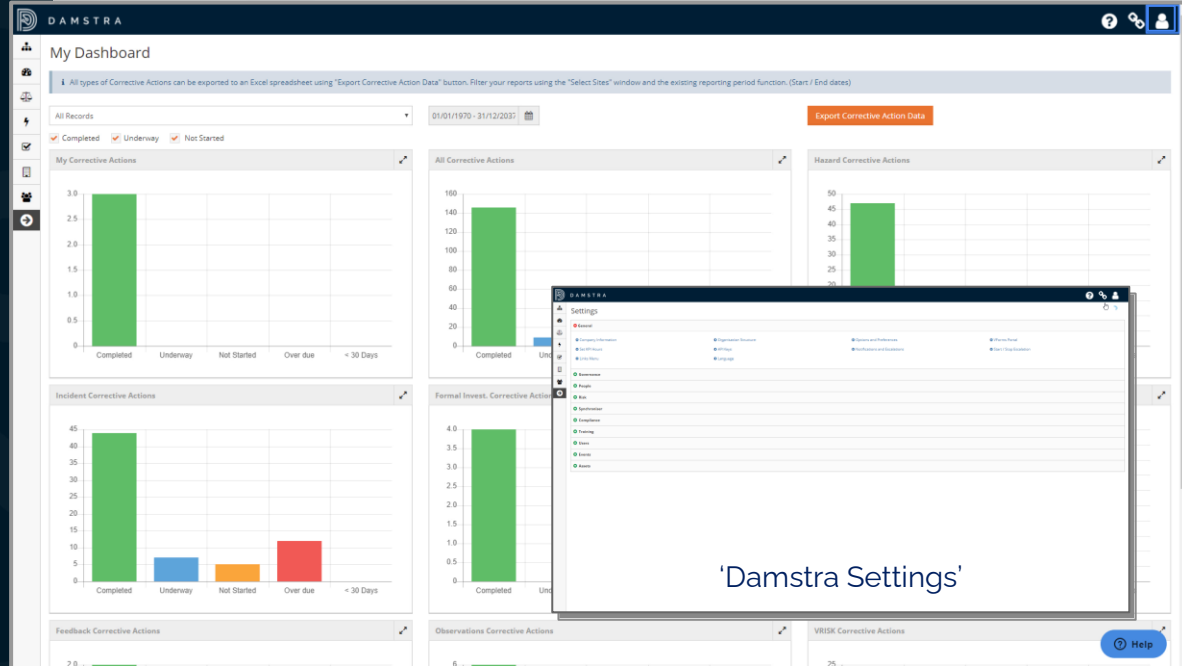
In the Compliance Module users can view, record information and manage Corrective Actions relating to topics such as Meetings, Toolbox Talks and anything else your business chooses to record.

In this guide, we'll show how to customise the Compliance Menu Item names, and the 'Type' picklist available to users when adding a new record.



Manage Compliance Types Settings

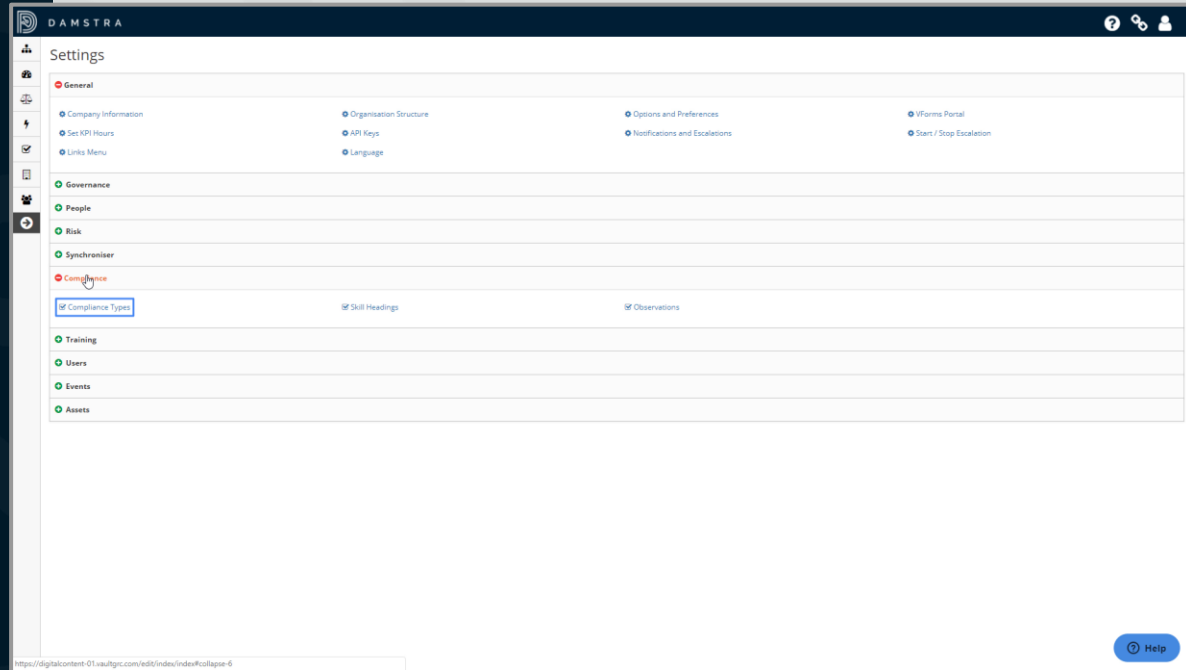
Compliance Type options are available in *Settings*, which can be found under the 'profile' icon, towards the top of the screen.



Manage Compliance Types

Compliance Types

Click to expand the *Compliance* Section, then **click** *'Compliance Types'*.



The screenshot displays the DAMSTRA Settings interface. The left sidebar contains a navigation menu with icons for Home, Settings, Users, Roles, and Compliance. The main content area is titled 'Settings' and is organized into sections: General, Governance, People, Risk, Synchroniser, Compliance, Training, Users, Events, and Assets. The 'Compliance' section is expanded, revealing three sub-items: 'Compliance Types', 'Skill Headings', and 'Observations'. A mouse cursor is positioned over the 'Compliance Types' link, which is highlighted with a blue border. The top of the interface features the DAMSTRA logo and navigation icons. A 'Help' button is located in the bottom right corner. The URL at the bottom of the browser window is <https://digitalcontent-01.vaultgic.com/edit/index/index#collapse-6>.

Manage Compliance Types

Compliance Types cont.

A list of Compliance Types, which are the menu items users will see in their Damstra Safety system are displayed on the left of the page.

Note that your system can be configured with up to seven menu items of your choosing.

The screenshot displays the 'Settings / Compliance Types' interface in the DAMSTRA system. It features two main panels for managing compliance types.

Compliance Types Panel:

Compliance Types	Status	Action
Audio	▼	Edit
Inspections	▼	Edit
Monitoring Checks	▼	Edit
Quality	▼	Edit
Meetings	▼	Edit
Surveys	▼	Edit
Tool box talk	▼	Edit

Type Panel:

Type	Action
RPH	Edit Delete
Workshop	Edit Delete
ACC	Edit Delete
General Equipment	Edit Delete
Truck and Trailer	Edit Delete
Personal Safety Equipment	Edit Delete

Both panels include search bars and pagination controls. The 'Compliance Types' panel shows 'Showing 1 to 7 of 7 entries', while the 'Type' panel shows 'Showing 1 to 6 of 6 entries'. A 'Back' button is located in the bottom right corner of the interface.

Manage Compliance Types

Edit Compliance Types

To rename or hide a Compliance Type, **select 'Edit'** next to the item.

Type in a new name in the Type field.

To hide a Compliance type, **untick 'Active Compliance Type'**.

Click 'Save' to apply changes.

The screenshot displays the DAMSTRA Settings / Compliance Types interface. The main panel shows a list of compliance types with columns for 'Compliance Types' and 'Status'. The 'Quality' row is highlighted, and the 'Edit' button next to it is selected. A dialog box titled 'Edit Compliance - 6' is open, showing the 'Type' field with 'Quality' entered and the 'Active Compliance Type' checkbox checked. The 'Save' and 'Cancel' buttons are visible at the bottom of the dialog.

Compliance Types	Status
Audio	Active
Inspections	Active
Monitoring Checks	Active
Quality	Active
Meetings	Active
Surveys	Active
Tool box talk	Active

Dialog Box: Edit Compliance - 6

Type:

Active Compliance Type

Buttons: Save, Cancel

Manage Compliance Types

Change Menu Position

To change the position of a Menu Item, **click** the 'up' or 'down' arrows.

The screenshot displays the DAMSTRA Settings / Compliance Types interface. The interface is divided into two main sections: 'Compliance Types' and 'Type'.

Compliance Types Table:

Compliance Types	Status	Edit
Audio		↑ ↓ Edit
Inspections		↑ ↓ Edit
Monitoring Checks		↑ ↓ Edit
Unused	INACTIVE	↑ ↓ Edit
Meetings		↑ ↓ Edit
Surveys		↑ ↓ Edit
Tool box talk		↑ ↓ Edit

Type Table:

Type	Edit	Delete
RPH	Edit	Delete
Workshop	Edit	Delete
ACC	Edit	Delete
General Equipment	Edit	Delete
Truck and Trailer	Edit	Delete
Personal Safety Equipment	Edit	Delete

The 'Compliance Types' table is highlighted with a blue box around the 'up' and 'down' arrows, indicating that clicking these arrows allows users to change the position of a menu item.

Manage Compliance Types

Add Type Item

To edit the options available in the 'Type' picklist available to users when adding a new record, first **click** on the desired *Compliance Type*.

Then, **click** 'Add' to add a new Type.

The screenshot displays the DAMSTRA Settings / Compliance Types interface. The main view shows a list of Compliance Types with columns for Name and Status. The 'Inspections' type is highlighted. A modal window is open, showing a search bar and a list of available types for selection. The 'Add' button is visible in the top right corner of the modal.

Compliance Type	Status
Audio	
Inspections	
Monitoring Checks	
Meetings	
Surveys	
Unusual	INACTIVE
Tool box talk	

Type
Senior Leader Observation Tours
Building Inspection
Flooring Check
Lighting
Respiratory equipment
Noise Levels
Fire Protection
Fire and Building Code
Security Inspection
Perimeter Inspection

Manage Compliance Types

Add Type Item cont.

Type the name of the option you wish to add and **click** 'Save'.

The screenshot displays the DAMSTRA application interface for managing compliance types. A modal window titled "Add Compliance Type" is centered on the screen, featuring a text input field containing the text "HMS". Below the input field are "Save" and "Cancel" buttons. The background interface shows a "Settings / Compliance Types" page with a search bar, a list of compliance types (e.g., Audio, Inspections, Monitoring Checks, Meetings, Surveys, Unused, Tool box talk), and a table of specific compliance items (e.g., Building Inspection, Flooring Check, Lighting, Respiratory equipment, Noise Levels, Fire Protection, Fire and Building Code, Security Inspection, Perimeter Inspection). Each item in the table has "Edit" and "Delete" buttons. The interface also includes a "Back" button at the bottom right and a "Help" button in the bottom right corner.

Manage Compliance Types

Edit or Delete a Type Item

To Edit or Delete an existing item, **click** the appropriate button.

The screenshot displays the DAMSTRA Settings / Compliance Types interface. It is divided into two main sections: 'Compliance Types' on the left and 'Type' on the right. Both sections feature a search bar and a list of items with 'Edit' and 'Delete' buttons. The 'Compliance Types' section includes items like Audits, Inspections, Monitoring Checks, Meetings, Surveys, Unused (with status INACTIVE), and Tool box talk. The 'Type' section includes items like H&S, Senior Leader Observation Tours, Building Inspection, Flooring Check, Lighting, Respiratory equipment, Noise Levels, Fire Protection, Fire and Building Code, and Security Inspection. A mouse cursor is hovering over the 'Edit' button for 'H&S'. The interface also includes a 'Back' button at the bottom right and a 'Help' button in the bottom right corner.

Manage Compliance Types

Edit or Delete a Type Item cont.

Note that this change is permanent and cannot be undone.

Also note that changes made here are committed as soon as they are entered - there is no need to click a 'Save' button and therefore changes cannot be 'Cancelled' once made.

The screenshot displays the DAMSTRA Settings / Compliance Types interface. The interface is divided into two main sections: 'Compliance Types' on the left and 'Type' on the right. The 'Compliance Types' section shows a list of items with 'Edit' buttons. The 'Type' section shows a list of items with 'Edit' and 'Delete' buttons. A 'Back' button is visible in the bottom right corner.

Compliance Types	Status	Action
Audits		Edit
Inspections		Edit
Monitoring Checks		Edit
Meetings		Edit
Surveys		Edit
Unused	INACTIVE	Edit
Tool box talk		Edit

Type	Action
H&S	Edit Delete
Senior Leader Observation Tours	Edit Delete
Building Inspection	Edit Delete
Flooring Check	Edit Delete
Lighting	Edit Delete
Respiratory equipment	Edit Delete
Noise Levels	Edit Delete
Fire Protection	Edit Delete
Fire and Building Code	Edit Delete
Security Inspection	Edit Delete

