



D A M S T R A

Basic Reporting Suite

Safety



[DISCLAIMER]

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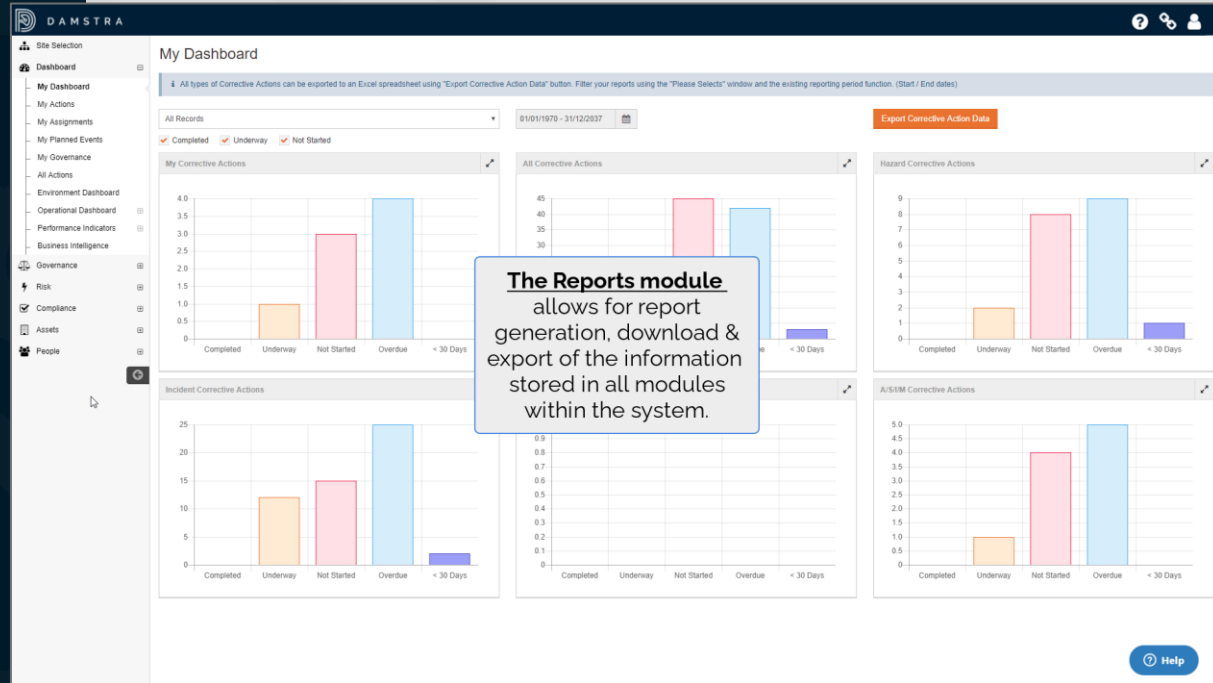
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Basic Reporting Suite Introduction

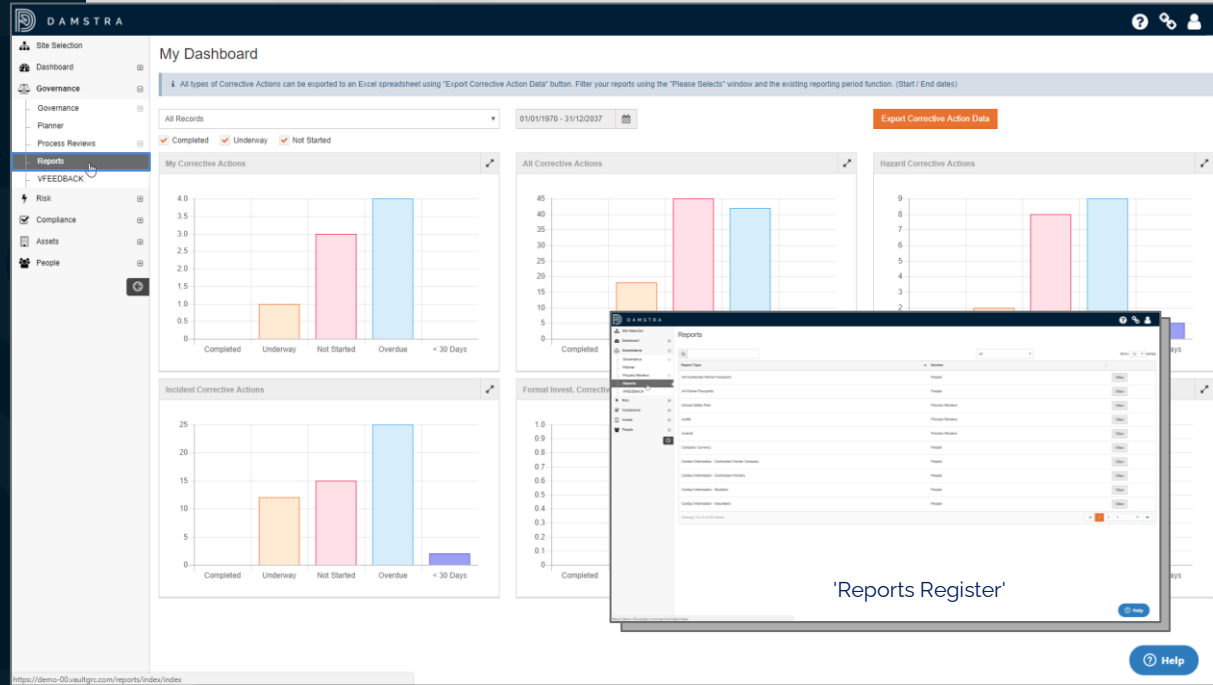
The *Reports* Module allows for report generation, download and export of the information stored in all modules within your system.



Basic Reporting Suite Reports Register

Access to the reporting suite is found under *Governance* in the menu bar.

The resulting *Reports Register* displays all the default reports available within the reporting suite.

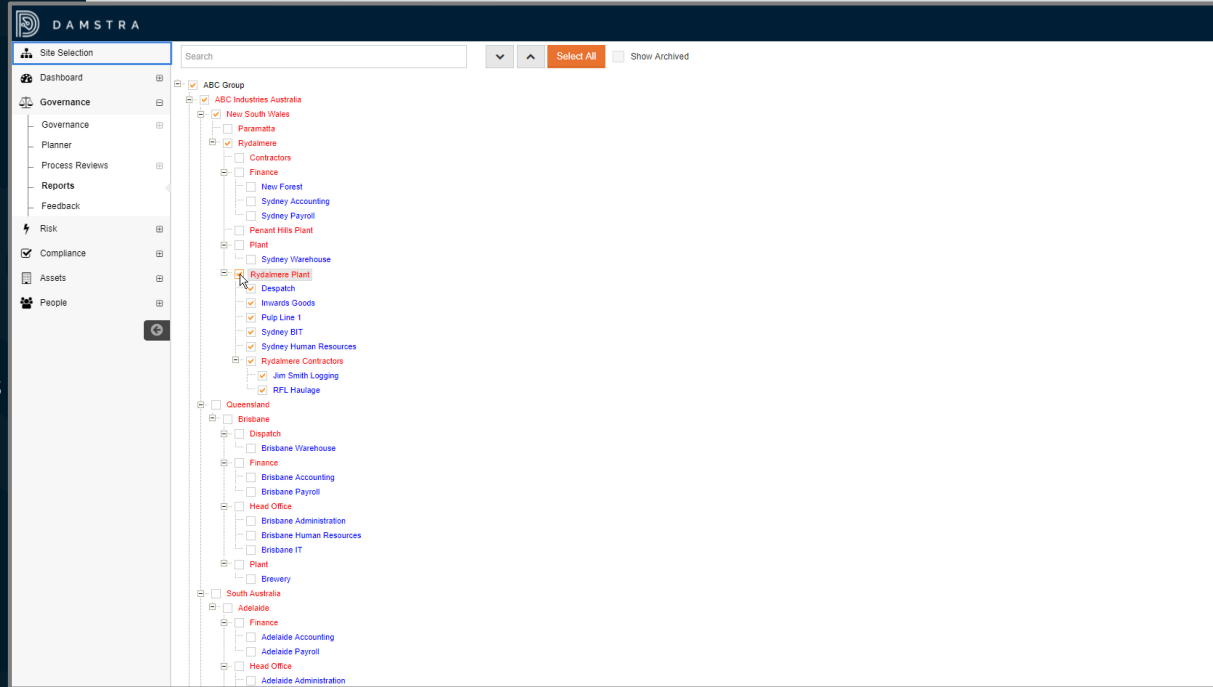


Basic Reporting Suite Site Selection

Reports can be filtered to relate to a particular *Site* or *Sites*, or the entire Organisation.

Simply **click** the *Site Selection* button in the *Menu bar* to select one or more Sites, depending on the level of access available to your profile.

The Reports Register will then be filtered to only the selected Site(s).

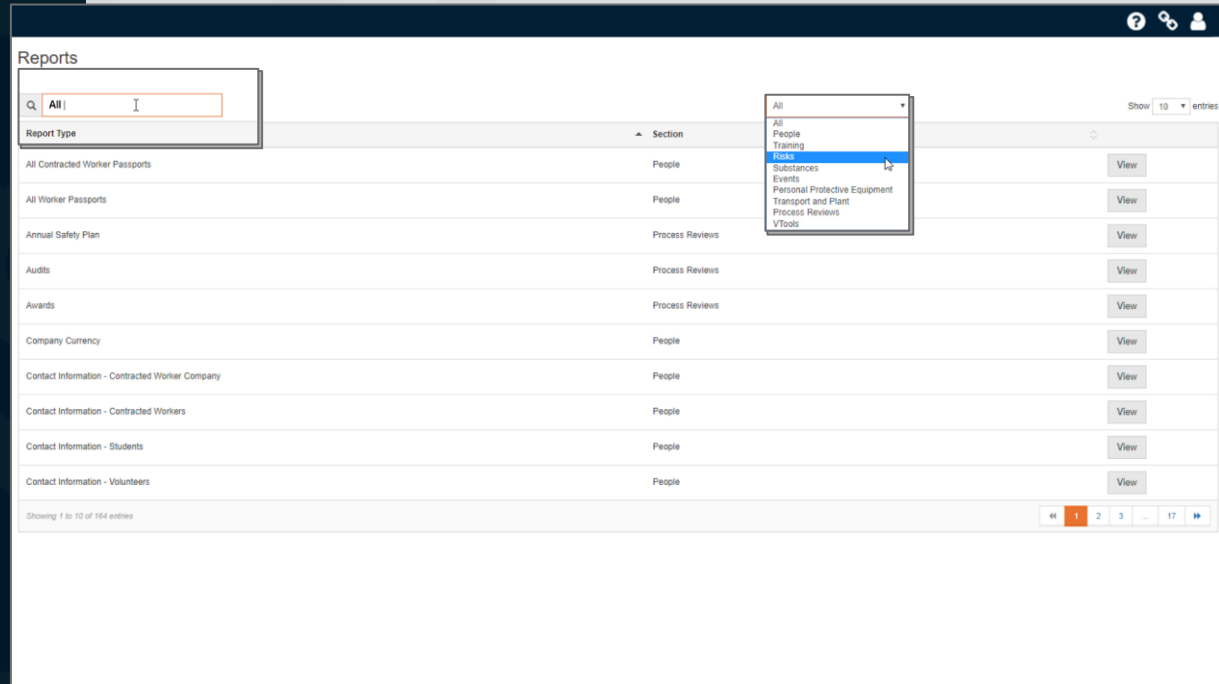


Basic Reporting Suite

Reports Register cont.

This register is easily searchable with the use of the filter, which allows you to stipulate the module you wish to report on and, if you know part or the full name of the report you're looking for, by the use of the search field itself.

Note: These two functions can also be combined for the desired result.



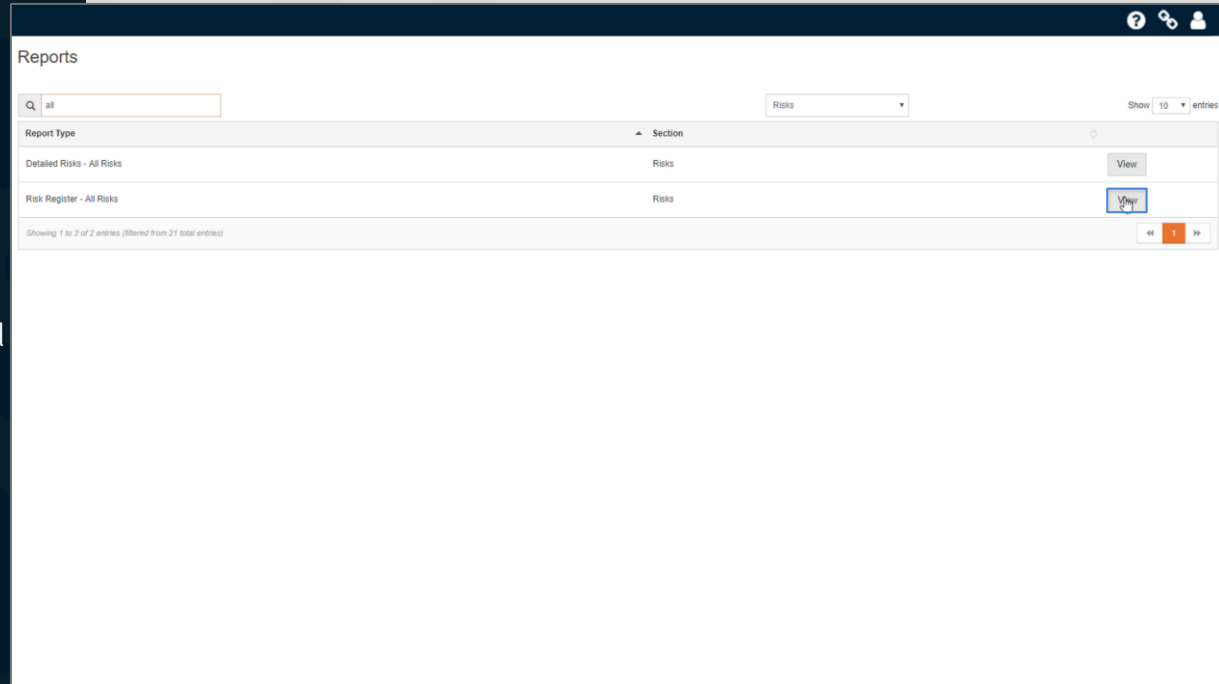
The screenshot displays the 'Reports' interface. At the top left, there is a search field with the text 'All' and a cursor. Below it is a 'Report Type' dropdown menu. To the right, a 'Section' dropdown menu is open, showing a list of categories: All, People, Training, Risks, Substances, Events, Personal Protective Equipment, Transport and Plant, Process Reviews, and VTools. The 'Risks' option is highlighted. The main area contains a table with columns for 'Report Type', 'Section', and 'View'. The table lists various reports such as 'All Contracted Worker Passports', 'All Worker Passports', 'Annual Safety Plan', 'Audits', 'Awards', 'Company Currency', 'Contact Information - Contracted Worker Company', 'Contact Information - Contracted Workers', 'Contact Information - Students', and 'Contact Information - Volunteers'. Each row has a 'View' button. At the bottom right, there is a pagination control showing 'Showing 1 to 10 of 184 entries' and a page number '1'.

| Report Type | Section | View |
|---|-----------------|------|
| All Contracted Worker Passports | People | View |
| All Worker Passports | People | View |
| Annual Safety Plan | Process Reviews | View |
| Audits | Process Reviews | View |
| Awards | Process Reviews | View |
| Company Currency | People | View |
| Contact Information - Contracted Worker Company | People | View |
| Contact Information - Contracted Workers | People | View |
| Contact Information - Students | People | View |
| Contact Information - Volunteers | People | View |

Basic Reporting Suite

Initiate Report

Once you have located the report you wish to generate, simply **click View** and proceed to stipulate your required Report parameters.



The screenshot displays the 'Reports' interface. At the top, there is a search bar containing 'all' and a dropdown menu set to 'Risks'. Below this is a table with two columns: 'Report Type' and 'Section'. The table contains two rows: 'Detailed Risks - All Risks' with 'Risks' in the 'Section' column, and 'Risk Register - All Risks' with 'Risks' in the 'Section' column. A 'View' button is located to the right of the first row, and a 'View' button is highlighted in blue below the second row. At the bottom of the table, it says 'Showing 1 to 2 of 2 entries (filtered from 21 total entries)'. The interface also includes a pagination control showing '1' of 2 pages.

| Report Type | Section | |
|----------------------------|---------|------|
| Detailed Risks - All Risks | Risks | View |
| Risk Register - All Risks | Risks | View |

Basic Reporting Suite

Report Period

For this Risk Register report:

Select the *Report Period*, which can be a preset period or fully customisable date range...

Reports / Risk Register - All Risks

Report Parameters

Report Period:

- Select Period
- All Records
- Current Month
- Last Month
- Year to Date
- Previous 12 Months
- Previous Calendar Year
- This Financial Year**
- Last Financial Year
- Custom

Include Common Risks

Include Reviews

Risk:

Show Corrective Controls

Include Considered Controls

Output Format:

Use Logo:

Reports / Risk Register - All Risks

Report Parameters

Report Period:

- Select Period
- All Records
- Current Month
- Last Month
- Year to Date
- Previous 12 Months
- Previous Calendar Year
- This Financial Year**
- Last Financial Year
- Custom

Include Common Risks

Include Reviews

Risk:

Show Corrective Controls

Include Considered Controls

Output Format:

Use Logo:

Basic Reporting Suite Department

...Then select the Department...

Reports / Risk Register - All Risks

Report Parameters

| | |
|---------------|--|
| Report Period | This Financial Year |
| Start Date | 01/07/2017 |
| End Date | 30/06/2018 |
| Department | <ul style="list-style-type: none">AllAllAccount ExecutivesAdministrationBranch officeButcheryCosmeticsDispatchEngineeringField OperationsFinanceFurnishingGE UnitGO Unit 1Head OfficeHealth and Safety OfficeLaboratoryLogisticsManagement HOManufacturingProcess Shed |
| Risk | |
| Output Format | |
| Use Logo | |

Basic Reporting Suite

Risk

...Choose to include or exclude certain other data types,

Then select the Risk type to be reported on.

Reports / Risk Register - All Risks

Report Parameters

| | |
|---------------|---|
| Report Period | This Financial Year |
| Start Date | 01/07/2017 |
| End Date | 30/06/2018 |
| Department | All |
| | <input type="checkbox"/> Include Archived |
| | <input checked="" type="checkbox"/> Include Common Risks |
| | <input checked="" type="checkbox"/> Include Reviews |
| Risk | <div style="border: 1px solid #ccc; padding: 5px;"><p>Select Risk</p><p>Select Risk</p><p>All Risks</p><p>Jet Boat trip - Thrill Jet</p><p>Laboratory Procedures</p><p>Attaching machinery to tractor</p><p>Cleaning gutters and drains</p><p>Use of Tardis Press</p><p>Staff security leaving company premises</p><p>Distillation - Ink and Solvent recovery process</p><p>Tree Felling - Use of equipment</p><p>Drugs and Alcohol in the workplace</p><p>Unloading curtain sider</p><p>Fork Lifts -Loading and Unloading of materials</p><p>Use of Chemicals on sites</p><p>Paint Spills</p><p>Paint thinners, turpentine, mineral spirits and solvent disposal</p><p>Loaders On Site</p><p>Stacking of logs</p><p>Vehicle movements onsite</p><p>Unloading curtain sider</p></div> |
| Output Format | |
| Use Logo | |

Basic Reporting Suite Format

The *Output* parameter options are always the same.

Choose the format from the dropdown.

Preview - displays a preview of your selected report to ensure all data has been included.

The screenshot shows a web application interface for generating a Risk Register report. The page title is "Reports / Risk Register - All Risks". Under the "Report Parameters" section, the following options are visible:

- Report Period: This Financial Year
- Start Date: 01/07/2017
- End Date: 30/06/2018
- Department: All
- Include Archived:
- Include Common Risks:
- Include Reviews:
- Risk: All Risks
- Show Corrective Controls:
- Include Considered Controls:

The "Output Format" dropdown menu is open, showing the following options:

- Preview (highlighted)
- PDF
- XLS 5-2003
- XLS 2007+

At the bottom right, there are three buttons: "Preview Report", "Print Report", and "Email Report". A "Back" button is located in the bottom right corner of the page.

Basic Reporting Suite

Format cont.

PDF - allows you to select the required paper size and orientation and produces a file to your downloads folder.

The screenshot shows the 'Risk Register - All Risks' report configuration page. The page is titled 'Reports / Risk Register - All Risks' and features a 'Report Parameters' section. The parameters are as follows:

- Report Period:** This Financial Year
- Start Date:** 01/07/2017
- End Date:** 30/06/2018
- Department:** All
- Include Archived:**
- Include Common Risks:**
- Include Reviews:**
- Risk:** All Risks
- Show Corrective Controls:**
- Include Considered Controls:**

The 'Output Format' section is expanded, showing a dropdown menu with the following options:

- Preview
- PDF
- XLS 5-2003
- XLS 2007+

The 'Paper Size' and 'Orientation' fields are currently empty. The 'Use Logo' field is set to 'ABC Industries New Zealand'. At the bottom right, there are buttons for 'Download PDF' and 'Email Report'. A 'Back' button is located at the bottom right of the page. The browser's download bar at the bottom shows a file named '783tg8iqgbb2yuq...pdf'.

Basic Reporting Suite

Format cont.

XLS format - produces a spreadsheet file to your downloads folder.

The screenshot displays the 'Reports / Risk Register - All Risks' interface. Under the 'Report Parameters' section, the following fields are visible:

- Report Period: This Financial Year
- Start Date: 01/07/2017
- End Date: 30/06/2018
- Department: All
- Include Archived:
- Include Common Risks:
- Include Reviews:
- Risk: All Risks
- Show Corrective Controls:
- Include Considered Controls:

The 'Output Format' dropdown menu is open, showing the following options:

- Preview
- PDF
- XLS 5-2003 (highlighted)
- XLS 2007+

At the bottom right, there are buttons for 'Download XLS', 'Email Report', and 'Back'. A mouse cursor is hovering over the 'Download XLS' button. The browser's address bar at the bottom shows a file path: 783tg@iqgbb2yuq...pdf.

Basic Reporting Suite Email

Alternatively, you can Email a report directly to as many recipients as required.

Note: Select the Company logo to be presented on the report and it's ready to go.

The screenshot displays two overlapping windows from the Basic Reporting Suite. The background window is titled 'Reports / Risk Register - All Risks' and shows the configuration for a report. The 'Report Parameters' section includes a 'Report Period' of 'This Financial Year', a 'Date' of '01/07/2017', and a 'Date' of '30/06/2018'. The 'Attachment' section is set to 'All' and includes checkboxes for 'Include Archived', 'Include Common Risks' (checked), and 'Include Reviews' (checked). There are also options for 'All Risks', 'Show Corrective Controls', and 'Include Considered Controls'. The 'Report Format' is set to 'PDF', and the 'Size' is 'A4'. The 'Orientation' is 'Portrait'. The 'Company Logo' is set to 'ABC Industries New Zealand'. At the bottom, there are buttons for 'Download PDF' and 'Email Report'.

The foreground window is titled 'Reports / Risk Register - All Risks / Email Report' and shows the configuration for sending the report via email. The 'To' field is 'Xia', the 'CC' field is 'Xavier@charles Storm - Xavierc@vaaultintel.com', and the 'Subject' is 'Risk Register - All Risks'. The 'Header Text' section contains a warning: 'DO NOT REPLY to this automated message. Please use the email address at the bottom to contact the sender directly.' The 'Comments/Message' section is empty. The 'Footer Text' section contains the following information: 'This email has been sent by: User Name: daniel martin, Type: Employee, Name: Martin, Daniel, Email Address: , Vault URL: https://demo-00.vaultgrc.com'. At the bottom right, there are 'Send' and 'Cancel' buttons.

Basic Reporting Suite

Repeat as Required

Once the report has been downloaded or email has been successfully sent, **click back** to return to the Reports Register.

Simply **repeat** the previous steps until all report activity has been completed.

The screenshot displays a web interface for generating reports. The title is "Reports / Risk Register - All Risks". Below the title is a "Report Parameters" section with the following fields and options:

- Report Period:** A dropdown menu set to "This Financial Year".
- Start Date:** A text input field containing "01/07/2017".
- End Date:** A text input field containing "30/06/2018".
- Department:** A dropdown menu set to "All".
- Include Archived:** An unchecked checkbox.
- Include Common Risks:** A checked checkbox.
- Include Reviews:** A checked checkbox.
- Risk:** A dropdown menu set to "All Risks".
- Show Corrective Controls:** An unchecked checkbox.
- Include Considered Controls:** A checked checkbox.

Below the parameters section are the following output options:

- Output Format:** A dropdown menu set to "PDF" with a help icon.
- Paper Size:** Radio buttons for "A4" (selected) and "A3".
- Orientation:** Radio buttons for "Portrait" (selected) and "Landscape".
- Use Logo:** A dropdown menu set to "ABC Industries New Zealand".

At the bottom right of the form are two orange buttons: "Download PDF" and "Email Report". A "Back" button is located at the bottom right of the page, with a mouse cursor hovering over it.

