



INTELLIGENT RISK SOFTWARE

**REPORT AN OBSERVATION VIA
VAULT NOTIFY**

VAULT

[DISCLAIMER]

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[Report an Observation via Vault Notify]

Introduction



Vault provides the ability for anyone within your Organisation to submit observations of safe or unsafe practices, which can then be recorded in the Compliance section for review

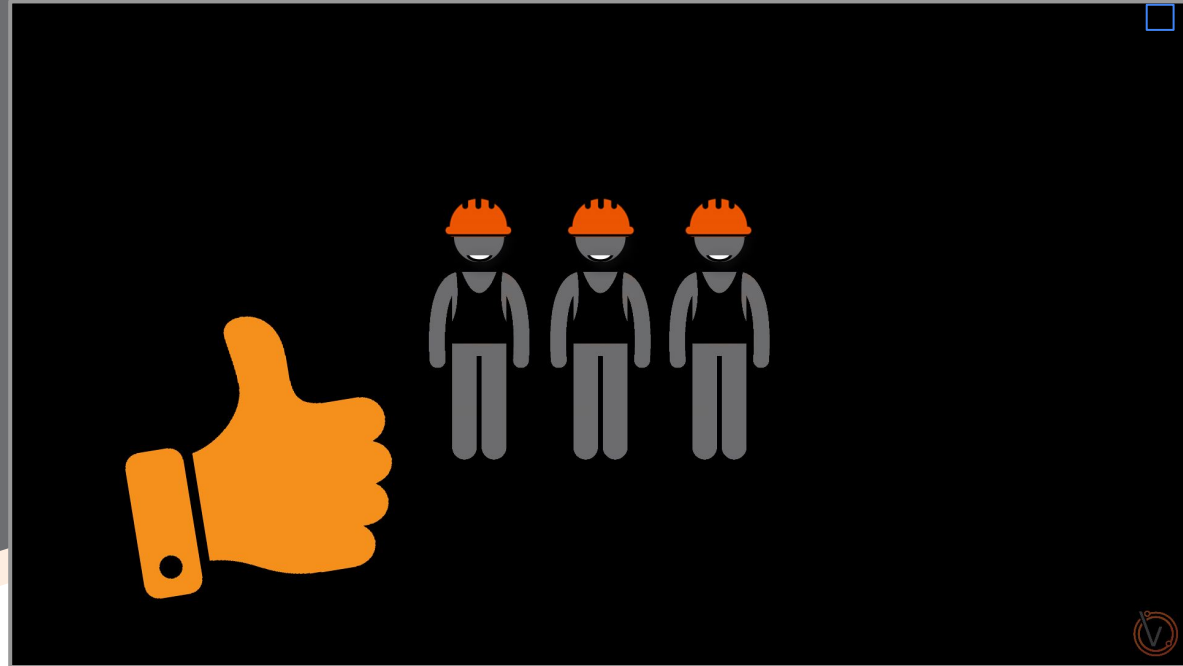


[Report an Observation via Vault Notify] Introduction Cont.



A *safe* observation is where something of a positive or proactive nature has been observed that promotes or displays health and safety best practice

An *unsafe* observation is when something has been observed that did not result in injury, illness or damage, but had the potential to do so



[Report an Observation via Vault Notify]

Introduction Cont.

There are two ways to add an Observation into Vault

Via the *Vault Web Portal*,
Or via the *Vault Notify App*

In this Video we'll be focusing on the *Vault Notify App*

VIA THE WEB PORTAL

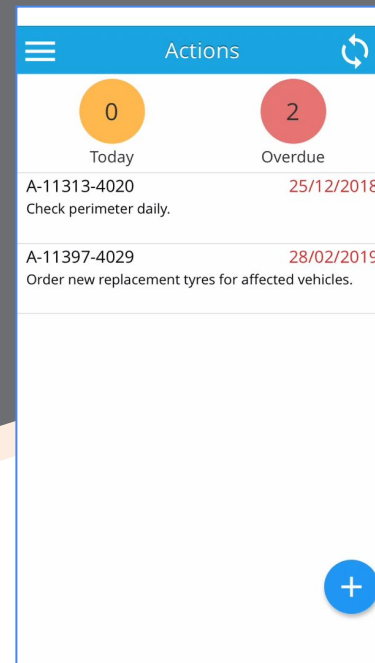
VIA THE VAULT NOTIFY APP



[Report an Observation via Vault Notify] Vault Notify App

Vault Notify is the mobile app that puts real-time Health & Safety in your pocket

From the home screen of the app you can see all the corrective actions assigned to you, and their current statuses



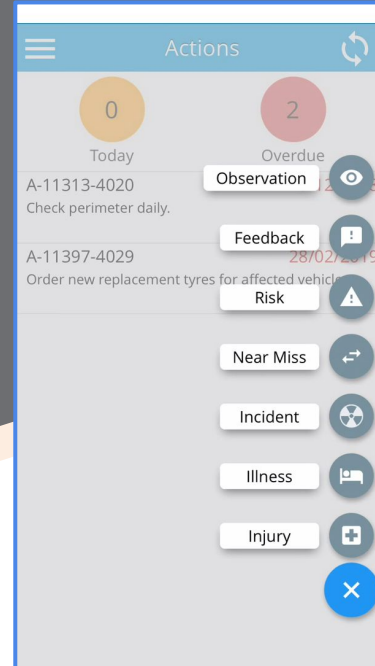
[Report an Observation via Vault Notify] Report an Observation



Adding an Observation is simple...

Just **tap** the *plus icon*, and all options are displayed

Note that your version of Notify may be displayed differently depending on your system configuration

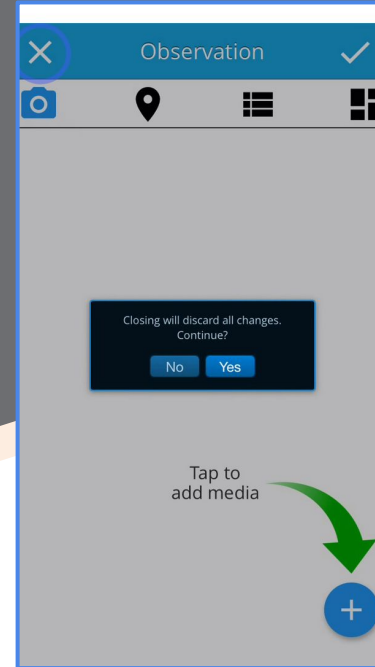


[Report an Observation via Vault Notify] Report an Observation Cont.



Select *Observation* from the menu

If you select the wrong option, don't worry, as you can return to the main menu via the "X", which will discard all changes and let you select again

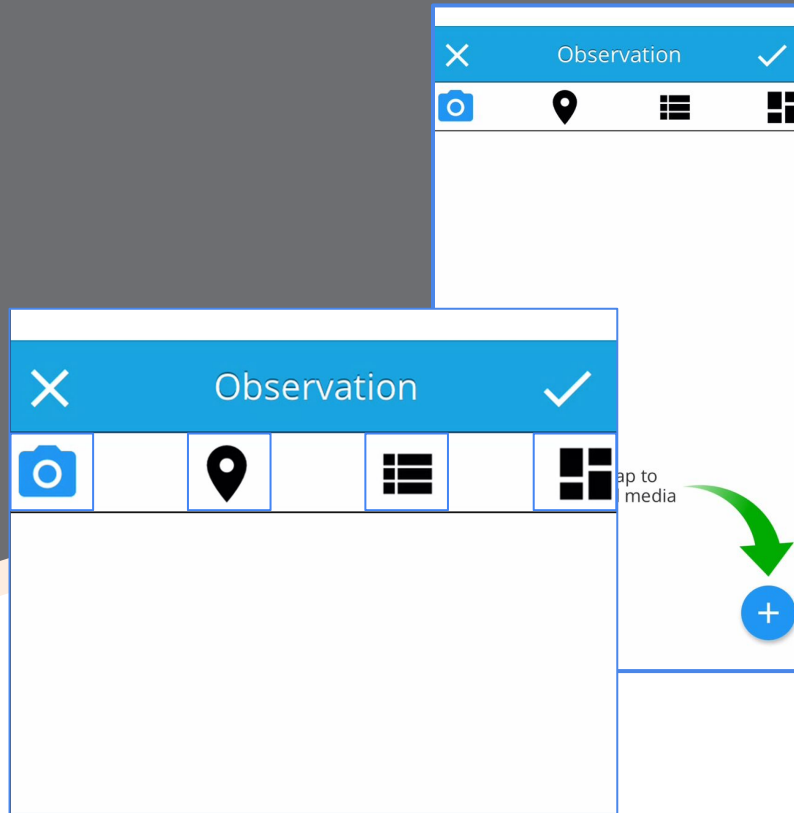


[Report an Observation via Vault Notify]

Report an Observation Cont.

From the *Add Observation* screen you can load multiple types of information, such as *photos or videos*, the *location*, a *description* of the Observation, and a *Corrective Action* if required

Populate this information in any order that you wish



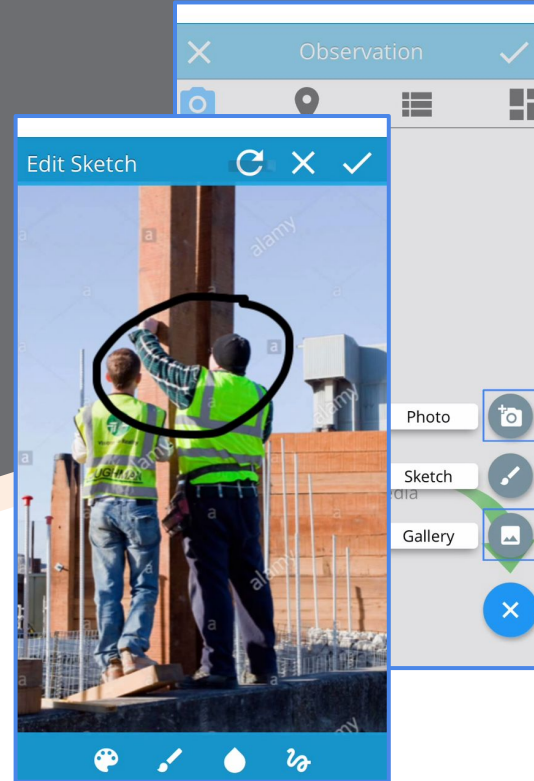
[Report an Observation via Vault Notify] Add a Photo



Best practice is to attach *visual evidence* of the Observation if appropriate

This media can be captured directly in the *Notify app* or added later from your device's *media gallery*

Once captured this media can be managed or edited from within the app according to requirements

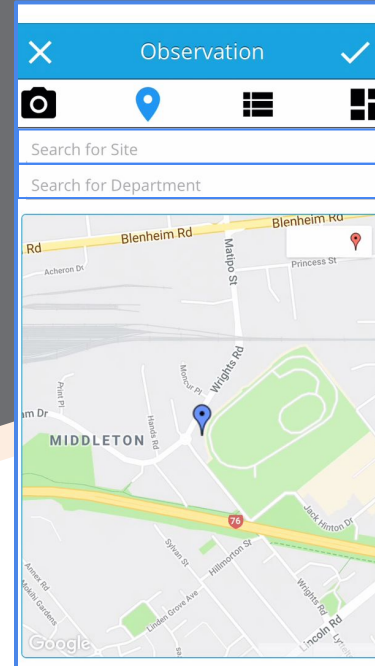


[Report an Observation via Vault Notify] Set the Location



Next use the *Location* section to pinpoint where the event occurred

This is done by first **selecting** the *Site* and *Department* where this Observation took place

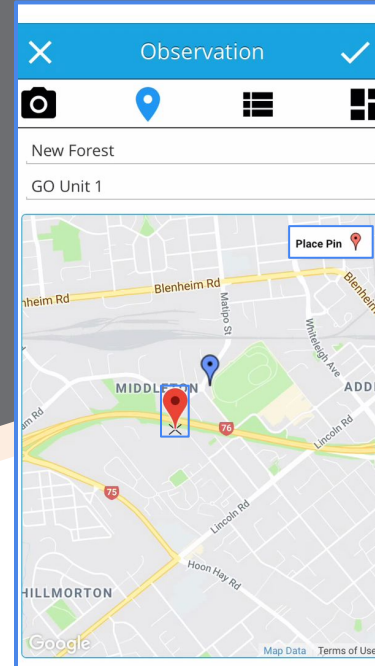


[Report an Observation via Vault Notify] Set the Location Cont.



...And then by ensuring that the *GPS pin placement* of the location is correct

Note that if the GPS pin has not defaulted correctly or if your no longer at the location of the Observation - you can also place a pin manually



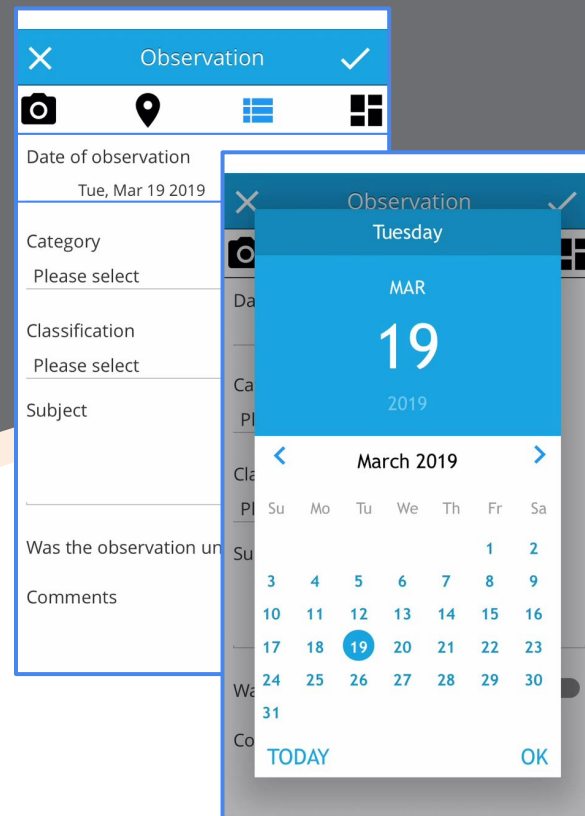
[Report an Observation via Vault Notify]

Add the Date of the Observation

In the next section you can add details about the Observation, starting with the *Date* of the Observation

Add the date of this Observation by **selecting** it from the *'Calendar'*

By default today's date will automatically be populated



[Report an Observation via Vault Notify] Select the Category



Select the *Category* of this Observation from the picklist

A screenshot of the 'Observation' form in the Vault Notify application. The form is titled 'Observation' and has a blue header bar with a close button (X) on the left and a checkmark on the right. Below the header are four icons: a camera, a location pin, a list icon, and a grid icon. The form fields are: 'Date of observation' (Mon, Mar 11 2019), 'Category' (Please select), 'Classification' (Please select), 'Subject' (empty), 'Was the observation un...' (partially visible), and 'Comments' (empty). A picklist is open over the 'Category' field, showing a scrollable list of categories: 'Communications/Procedures', 'Damage Report', 'Fix It - Customer / Supplier Related', 'Fix It - Safety Issue', 'Fix It - System Improvement', and 'Fork Hoist'. The picklist has a 'Done' button at the bottom right.

[Report an Observation via Vault Notify] Select the Category



Then **select** the *Classification* of this Observation from the *picklist*

Note that *Categories* and *Classifications* can be **configured** in *Vault Settings*, help with which is available in the *Support Portal*

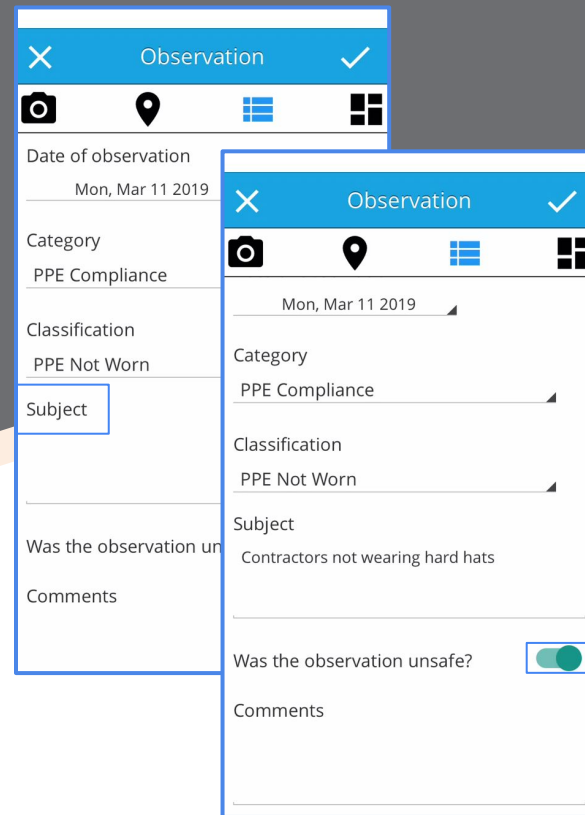
A screenshot of the 'Observation' form in the Vault Notify mobile application. The form is titled 'Observation' and has a blue header bar with a close button (X) on the left and a checkmark on the right. Below the header are four icons: a camera, a location pin, a list icon, and a grid icon. The form fields are: 'Date of observation' (Mon, Mar 11 2019), 'Category' (PPE Compliance), 'Classification' (Please select), 'Subject' (empty text field), 'Was the observation unsafe?' (toggle switch), and 'Comments' (empty text area). A picklist is open over the 'Classification' field, showing a list of categories: 'PPE Incorrectly Worn', 'PPE Misplaced', 'PPE Not Worn', and 'PPE Worn'. The 'PPE Not Worn' option is highlighted. A 'Done' button is visible at the bottom right of the picklist.

[Report an Observation via Vault Notify]

Enter a Subject & Choose if Safe or Unsafe

Then **choose** the accountable *Department* from the picklist

Note that *Departments* are an optional field in Vault and may not appear in your system. This can be configured in *Vault Settings*



The image displays two screenshots of the 'Observation' form in the Vault Notify application. The top bar of both forms is blue with a white 'X' on the left and a white checkmark on the right. Below the bar are four icons: a camera, a location pin, a list icon, and a grid icon.

The left screenshot shows the following fields:

- Date of observation: Mon, Mar 11 2019
- Category: PPE Compliance
- Classification: PPE Not Worn
- Subject: (highlighted with a blue box)
- Was the observation unsafe? (toggle switch is off)
- Comments: (empty text area)

The right screenshot shows the following fields:

- Date of observation: Mon, Mar 11 2019
- Category: PPE Compliance
- Classification: PPE Not Worn
- Subject: Contractors not wearing hard hats
- Was the observation unsafe? (toggle switch is on)
- Comments: (empty text area)

[Report an Observation via Vault Notify] Enter a Comment



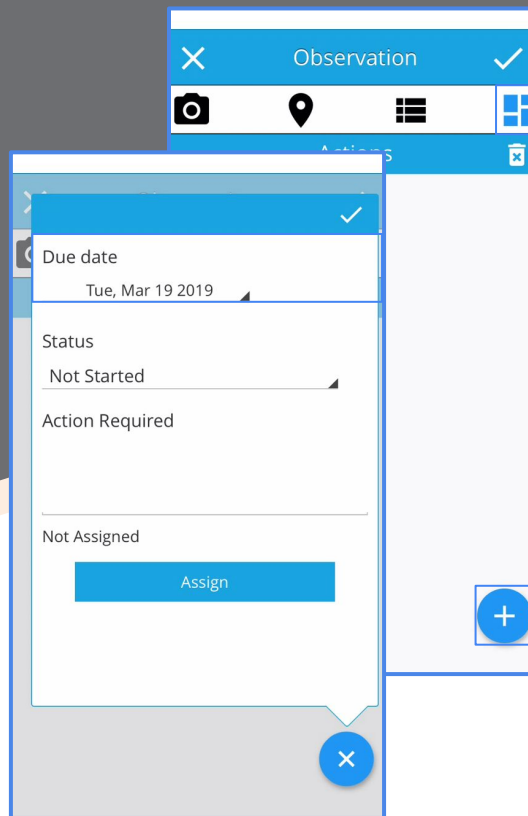
Finally, **enter** a *Comment* explaining the nature of this Observation

A screenshot of the "Observation" form in the Vault Notify mobile application. The form is displayed on a white background with a blue header bar. The header bar contains a close button (X), the title "Observation", and a checkmark. Below the header, there are four icons: a camera, a location pin, a list icon, and a grid icon. The form fields are as follows: a date field showing "Mon, Mar 11 2019"; a "Category" dropdown menu with "PPE Compliance" selected; a "Classification" dropdown menu with "PPE Not Worn" selected; a "Subject" text field containing "Contractors not wearing hard hats"; a toggle switch for "Was the observation unsafe?" which is currently turned on (green); and a "Comments" section with a text area containing the text "Contractors at new forest were spotted not wearing hard hats." and a small blue icon in the bottom right corner of the text area.

[Report an Observation via Vault Notify] Add a Corrective Action

The last step is to add a Corrective Action to this Observation, if required by **tapping** the *Plus icon*

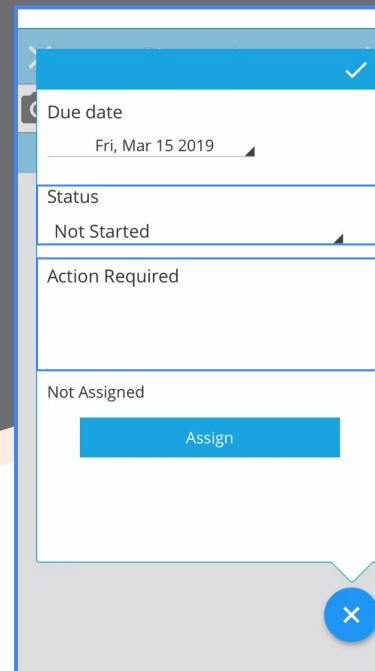
Then add the *date* that this Corrective Action was assigned by **selecting** it from the *calendar*



[Report an Observation via Vault Notify] Add a Corrective Action Cont.

Set the *Current Status* of this Corrective Action. This will need to be updated as the Corrective Action is undertaken

Then **update** the *Action Required*



The screenshot shows a mobile application interface for reporting observations. The form is titled "Add a Corrective Action Cont." and includes the following fields:

- Due date:** Fri, Mar 15 2019
- Status:** Not Started
- Action Required:** Not Assigned

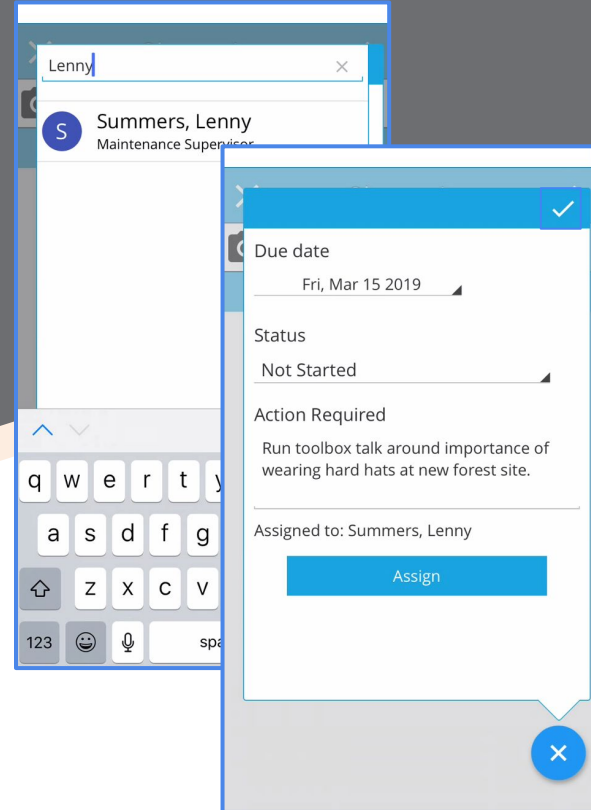
A blue "Assign" button is located below the "Action Required" field. A blue "X" button is visible in the bottom right corner of the form.

[Report an Observation via Vault Notify] Add a Corrective Action Cont.



Choose who to Assign this Corrective Action to by **tapping** 'Assign', and selecting the employee. Smart search makes this easy

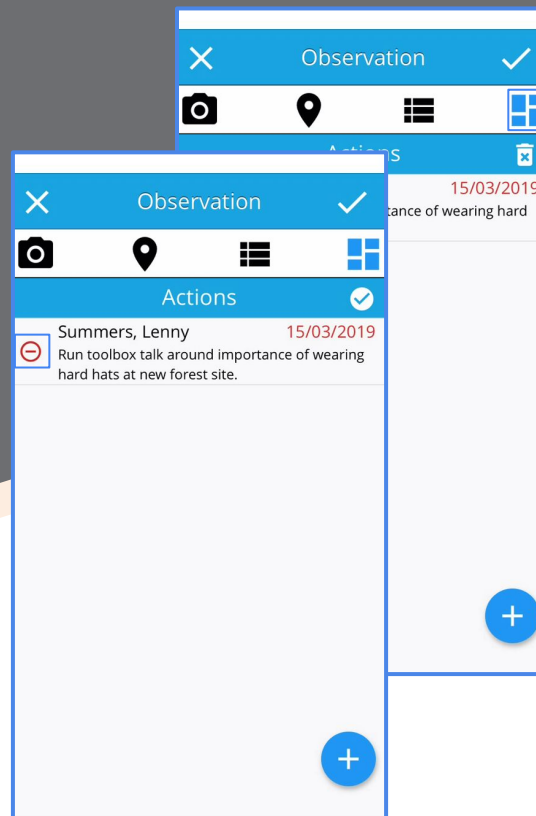
Once done, **tap** the 'Tick' icon to save this Corrective Action



[Report an Observation via Vault Notify] Delete a Corrective Action

To **delete** a *Corrective Action*, tap the *'Rubbish Bin Icon'*

Then, the *'Delete icon'*

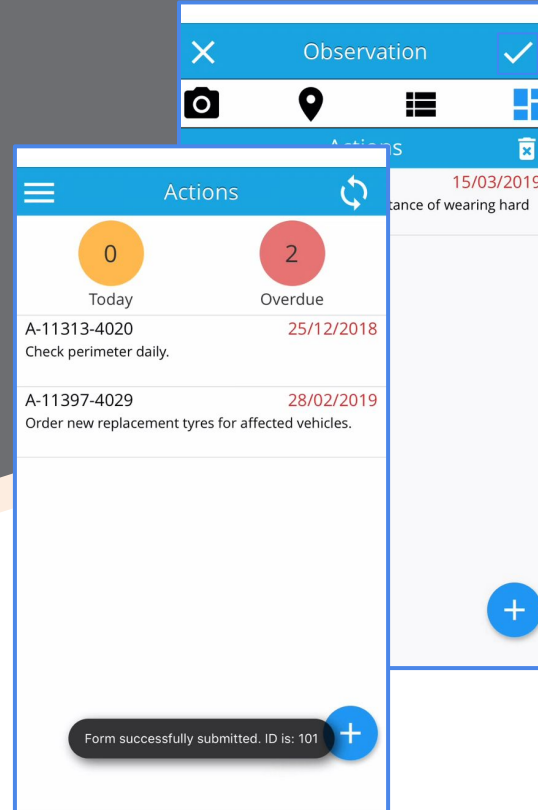


[Report an Observation via Vault Notify] Submit an Observation



Finally, to submit the Observation, **tap** the *'Tick icon'*

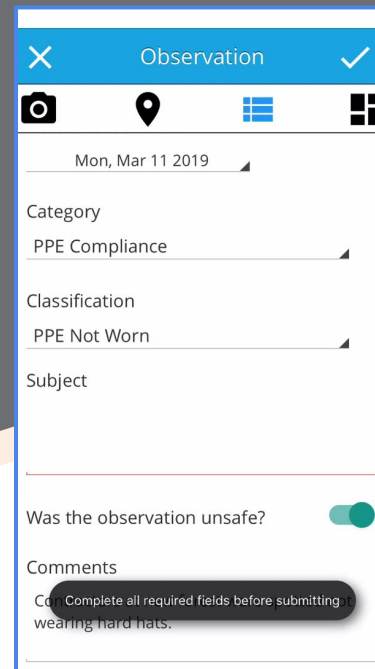
A pop-up notification will advise this has been saved successfully



[Report an Observation via Vault Notify] If You've Missed a Mandatory Field

If you have missed a mandatory field, a pop-up will appear at towards the bottom of the screen indicating that required fields have been missed -

Simply **update** and *submit* once more.



The screenshot shows the 'Observation' form in the Vault Notify app. The form includes fields for Date (Mon, Mar 11 2019), Category (PPE Compliance), Classification (PPE Not Worn), and Subject. A toggle switch for 'Was the observation unsafe?' is turned on. At the bottom, a red error message states: 'Complete all required fields before submitting: wearing hard hats.' A dark grey button with a white arrow pointing right is positioned over the error message.

[Report an Observation via Vault Notify] Add a Corrective Action

Your *Observation* has now been added to the company Observations registers for further investigation and action

Help with other Observation related topics is available in the support portal

