

## 1.1. Introduction

This guide is to assist Safety and Health Representatives (SHRs) to generate open and overdue workplace inspection tasks reports for their SHR area that they are responsible for.

## 1.2. Privacy of Information

Reports generated from C.H.A.R.M. contain personal information and care should be taken when distributing reports.

In accordance with the University’s Values and Signature Behaviours, members of the University community are responsible for respecting an individual’s right to privacy.

## 1.3. Generating Reports

SHRs are able to generate reports via their own C.H.A.R.M. log-in and dashboard for their SHR areas/s.

**Please note:** When generating reports, the results may be limited due to your permissions and access level. Should you require a report for a Faculty, School/Area please contact [healthandsafety@curtin.edu.au](mailto:healthandsafety@curtin.edu.au)

### Tasks (corrective actions) report

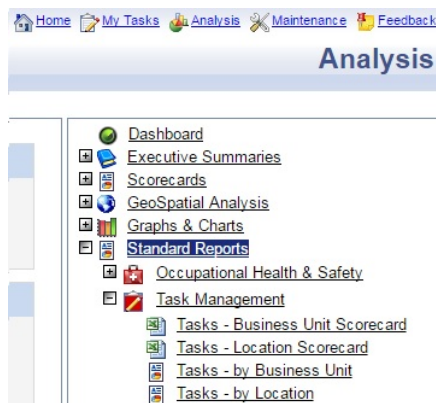
An overdue tasks report generates a pdf report which flags any tasks that have not been completed prior to their assigned due date.

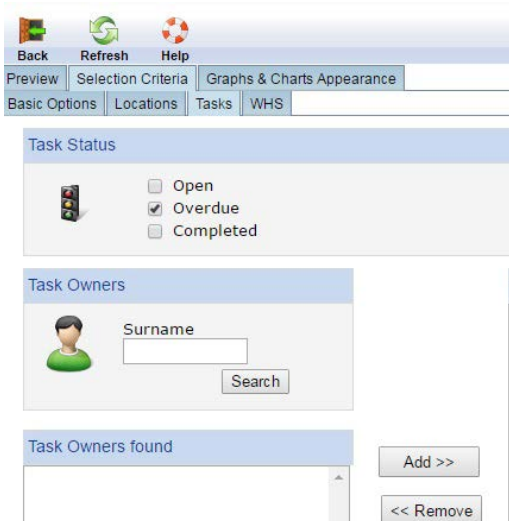
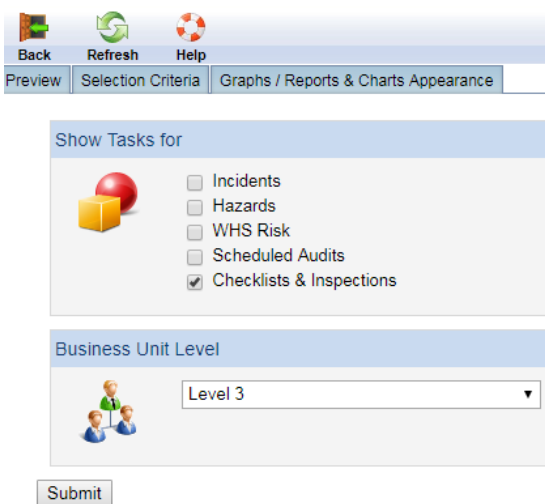


1. Log into the Staff Portal
2. Click on the right arrow of the application wheel and then the C.H.A.R.M icon to access C.H.A.R.M

### To generate an overdue tasks report

3. Click on **Analysis** (top right menu bar)
4. Expand the **Standard Reports** drop down list
5. Expand the **Task Management** drop down list
6. Click on **Tasks - by Business Unit**



<p>7. Click on the <b>Selection Criteria</b> tab</p> <p>8. Select your <b>Date Range</b> using the calendar drop down lists</p> <p>9. Under “<b>Status</b>” tick the <b>New</b> and <b>Open</b> checkboxes to view tasks for new and open checklists.</p> <p><i>Note: The Closed checkbox is not required to be ticked as these actions will already be completed.</i></p>	
<p>10. Click on the <b>Tasks</b> tab</p> <p>11. Tick the “Open” and “Overdue” checkboxes</p> <p><i>Optional</i></p> <p>12. <b>Task Owners</b> To generate a report to see tasks assigned to a specific person/s, type the surname in the surname box to generate a search. The search results will appear in the Task Owners found box. Click <b>Add&gt;&gt;</b> to add the user to the Selected Task Owners section.</p>	
<p>13. Click on the “<b>preview</b>” tab</p> <p>14. Under “<b>Show Tasks for</b>” Check the <b>Checklists &amp; Inspections</b> checkboxes to view overdue tasks for the Checklists and Inspections module.</p> <p>15. <b>Business Unit Level:</b> select <b>Level 3</b> from the drop down list</p> <p>16. Click on the <b>Submit</b> button</p> <p><b>Results may be limited due to your permissions and access level.</b></p> <p><b>Should you require a report for a whole Faculty, School/Area please contact <a href="mailto:healthandsafety@curtin.edu.au">healthandsafety@curtin.edu.au</a></b></p>	

17. The screen will go to the **Preview** tab and the report will appear in a pdf format in the pdf viewer to download.

18. Hover over the top right section of the report where a task bar will appear.

19. Click on the download icon to download the pdf report.

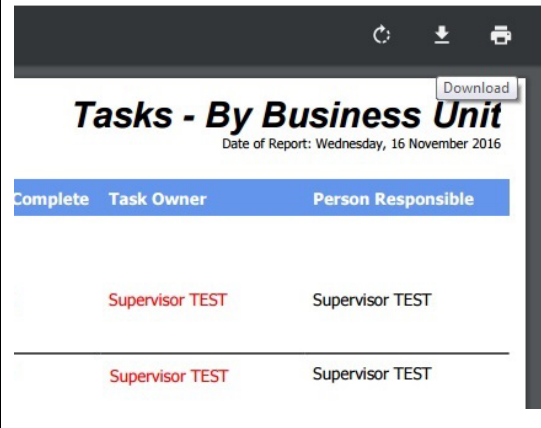













Figure 5. Example: Overdue Tasks report

Ref.	Type	Task Description	Due Date	% Complete	Task Owner	Person Responsible
<b>Health and Safety</b>						
 28	Audit	Warden to undergo warden training	30/03/2018	0%	David Croghan	Chloe Hessel
 28	Audit	Warden to undergo warden training	31/03/2018	0%	Anne-Marie Bosch	Chloe Hessel
 28	Audit	test action item	31/03/2018	0%	David Croghan	Chloe Hessel
 33	Audit	AMB to buy trolley (test)	31/05/2018	0%	Anne-Marie Bosch	Chloe Hessel
 34	Audit	Have fire equipment tested and tagged	31/05/2018	0%	Chloe Hessel	Chloe Hessel
 35	Audit	Place request to have fire equipment tested and tagged.	31/05/2018	0%	Anne-Marie Bosch	Chloe Hessel
 36	Audit	Properties to fix	31/05/2018	0%	Anne-Marie Bosch	Supervisor TEST
 39	Audit	Incident needs to be entered into Charm	6/06/2018	0%	Chloe Hessel	Supervisor TEST
 43	Audit	SCC to arrange test	8/06/2018	40%	Anne-Marie Bosch	Supervisor TEST
 49	Audit	Please review my inspection	27/07/2018	0%	Anne-Marie Bosch	Supervisor TEST
<b>Total - 10 Actions</b>						
 designates that the action is overdue.						

powered by [riskware.com.au](http://riskware.com.au) Page 1 of 1

Reports identifying people are confidential documents.  
Statistical information shall only be used for internal reporting purposes.

REVISION HISTORY		
Revision #	Date	Amendment Description
1	14/08/2018	New Document