



Action Tracker

Web EHSdesk™ provides a fully integrated suite of web-based software applications designed to support administrative, operational, and business process information management associated with Environment, Health, and Safety (EHS).

The **Action Tracker (ACT)** application maintains the various action items involved with managing the EHS or Quality requirements of an organization. Action Tracker provides the ability to track action items independent of the subject matter covered in other Web EHSdesk applications. An action item can be one-time or a recurring series based on a frequency and can be high level (Compact) or broken down into line item tasks (Full). The use of plan items allows you to divide the overall requirements into individual actions items. Action Tracker proactively reminds users via e-mail of coming due or overdue action items.

Features and Functionality

- Ability to break down requirements into multiple line item tasks to delegate multiple responsible persons
- Plan items can be established to divide the overall requirements into individual action items
- Two methods for managing Action Items (Full and Compact) depending on business needs and required level of detail
- Task Owners, business drivers, recurring events, status, and contacts can be maintained for each Action Item
- Maintain Pass/Fail status for routine medical exams (e.g., eye exams, respiratory fit, etc.)

Action Item Summary

The following is a summary of the information for the selected Action Item.

Action Item Details			
Action Item No.: 107	Owner: Ciancio, Joan	COPY VIEW EDIT	
Status/Due Date: Open Series	Type/Name: EHS / Regulation Manager		
Location: SAC Training Site	Org: ROK Org for Training		
Action Item Desc.:			
Tasks			
Task No.	Due Date	Name	Owner
Business Drivers			
Driver Type	Driver Name		
Related Files			
Type	File Description	Electronic Attachment?	Link
EHS Objects			
Object Type	Object Id	Object Name	
Regulation	test record	test	
Plan Items			
No.	Element	Type	Name
Recurring Series Details			
Frequency	No. of Occurrences to Create	Series End Date	
Annual	1	11/30/2015	
Action Item Occurrences			
Occurrence No.	Due Date	Name	Status
1	11/30/2015	Regulation Manager	Overdue
Task Occurrences			
Task No.	Due Date	Name	Owner

Action Item Summary (Full Action Item)

- Simple "Quick Form" interface for closing Action Items and tasks
- A recurring series can be established for those action items that repeat monthly, quarterly, etc.
- Typical users include EHS Managers, Quality and Medical Professionals, and Task Owners

Benefits

- Consistent Action Item tracking process across many disciplines provides standard work
- One central point for ease of use by Action Item Owner and Plan Item Owner to view and status plans and action items
- Robust business process emerges while allowing individual flexibility
- Improves management visibility through status reports
- Proactive e-mail notification results in expedited closure of open Action Items
- Allows multi-year planning to align EHS planning with financial planning cycles

Plan Item Summary Report

Plan Item Details			
Plan Item No.: 1007	Plan Type: Annual Plan		
Plan Element: 1005 Training Management	Status: Open		
Plan Item Name: Annual EHS Training			
Plan Description: Initial workplace safety training and refresher courses for all employees and contractors			
Plan Item Owner: Tester, Arny	Issue Person: Tester, Arny		
Location: TEST SITE	Org: DEPT 01: Operations		
Issue Date: 07/20/2017	Start Date: 07/01/2017		
Close Date:	Close Person:		
Also Known As: Compliance Training	% Complete: 33		
Compliance Related?: Yes	Priority: High		
Comment: This training will help maintain compliance with OSHA Training Requirements			
Estimated Cost: 5000.00 \$USD	Actual Cost:		
Business Drivers			
Driver Type	Driver Name	Driver Description	
Annual Plan	Annual Plan Requirement		
Action Items			
No.	Due Date	Name	Owner
129 - 0	06/30/2016	General Safety	Safety, Sam
267 - 0	06/30/2016	EHS Safety Plan	Tester, Jayne
1270 - 0	09/01/2017	Annual EHS Training	Tester, Arny

Plan Item Summary Report

E-mail/Reports


- Ad hoc reporting is available using a flexible search with multiple filters; query results can be printed or saved to an Excel™ or Acrobat™ format
- Summary Reports available to print available action item/plan item data in a report format for e-mailing/printing to include any uploaded pictures
- Various status and inventory reports available to report out on the action item/plan item data
- Automatic notification e-mail sent to Task Owners, as well as weekly status e-mail to Action Item Owners

Integration Points

- EHSdesk **Admin**: associate an ACT record with equipment, confined spaces, Shop ERGO assessments, and Risk Assessments
- EHSdesk **Regulation Manager (REG)**: action items are automatically created based on renewal and expiration dates of regulation records

Compliance

Assists in meeting requirements of ISO 9001, OHSAS 18001, and ISO 14001





Process Flow

