



**Science & Technology
Facilities Council**

Entering SHE Tours and Action Management in Evotix Assure

Guidance Notes for the use of Evotix Assure

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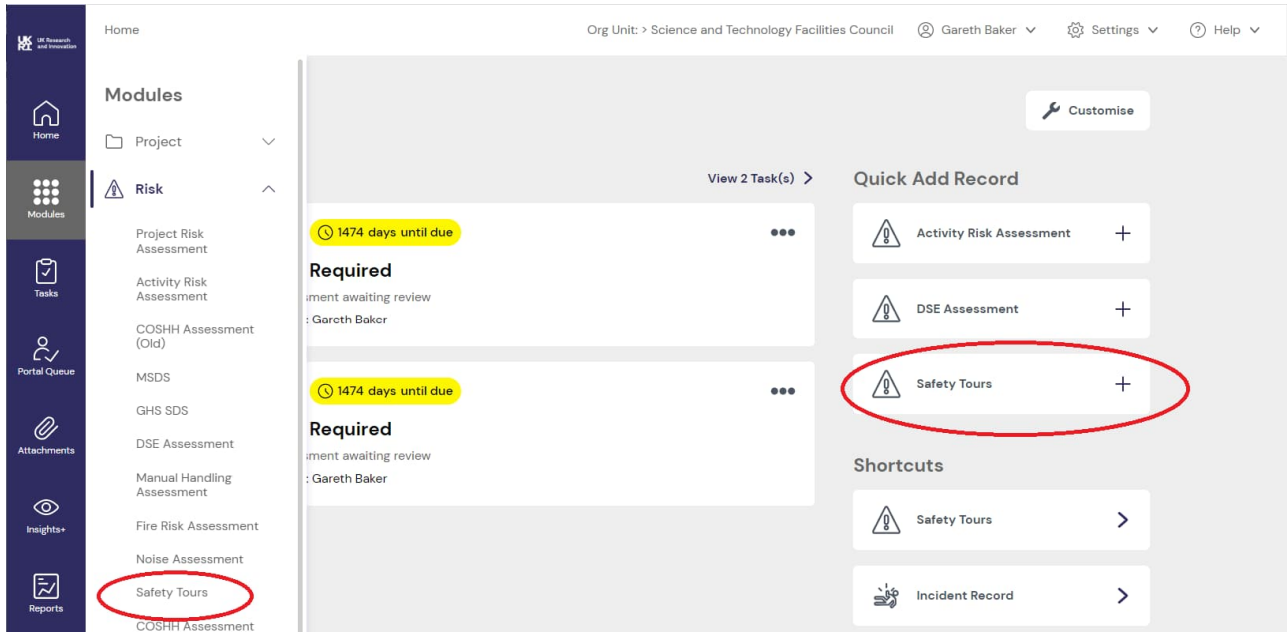
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1. INTRODUCTION

This document shows how to use the Evotix Assure system to enter and manage actions from SHE tours.

1.1 SHE Safety Tours

Log into the [main system](#) (see Document 1)



From the menu strip on the left, choose Modules -> Risk -> Safety Tours or in the 'Quick Add Record' section click on 'Safety Tours'. If you used the menu strip then you will need to click on 'New Record' in the next screen:



Either way should bring up a new Safety Tour record.

Home → Risk → Safety Tours → Create

Safety Tours
Actions
Attachments
Notes

Details

Org Unit

STFC

Reference*

Automatic Reference

☒ System Assigned

Is This Confidential

☐

Project Reference

Date of Safety Tour*

Time of Safety Tour*

Location

Site

Safety Tour Team Members*

Was The Tour Satisfactory?

☒

Tour Score

Reported By*

Reported By Date

The following information should be included and then scroll down and click 'Save' prior to any further details being added.

The critical information that must be added is highlighted by an asterisk *.

INPUT	DESCRIPTION
Org Unit	Select the Department the Safety Tour was conducted for.
Date of Safety Tour	The date of the Tour.
Time of Safety Tour	The approximate start time of the tour.
Location	The area and year of the Safety Tour e.g. ALICE TOUR 2008 (This will identify it in the list of Safety Tour records)
Site	Site tour was undertaken on.
Safety Tour Team Members	List of staff undertaking tour
Reported By	The person in charge of the Tour.
Reported By Date	Date tour was entered in the system
Tour Score	Tour Score

×

Save

Save & Close

Cancel

Expand

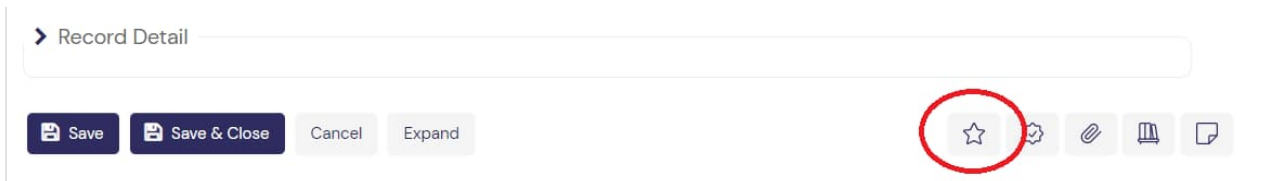
Once this Safety Tour entry has been saved Actions can be added.

Safety Tour Scores

Score	Descriptor	Commentary
1	Unsatisfactory	Serious hazards identified requiring immediate shutdown of area and Departmental Director notified. The area is only to be reopened when the faults are corrected and the area made safe and authorisation given by the Department Director. Areas receiving a score of 1 should be re-toured prior to re-opening and after three months.
2	Significant Improvements Needed	A high number of faults / hazards identified. The department head of an area scoring a four is to be notified and sent the tour report which will include a list of faults. Areas receiving a score of 2 should be re-toured shortly after the three month correction period has expired.
3	Moderate Improvements Needed	Numerous faults / hazards identified. Areas receiving a score of 3 should be re-toured shortly after the three month correction period has expired.
4	Minor Improvements Needed	Two or three minor faults / hazards identified. Areas receiving a score of 4 should be re-toured as planned in the next round of annual tours.
5	Satisfactory	One minor fault / hazard identified. Areas receiving a score of 5 should be re-toured as planned in the next round of annual tours.

1.2 Adding Actions

Re-open the Safety Tour record you have just created and scroll down. At the bottom of the screen, click on the '☆':



You will then be presented with the following view (The list will usually be blank).

A screenshot of the 'Action' view. At the top right, there is a '+ New Record' button circled in red. Below this is a search bar. The main content is a table with the following columns: Reference, Org Unit, Date of Safety Tour, Location, Safety Tour Team Members, and Record is Unassigned. The first row shows Reference 230, Org Unit ISIS, Date of Safety Tour 26/10/2022, Location R55 Sample Environment Labs, Safety Tour Team Members Duncan Francis, Xavier Queralt, Bhavin Patel, Brian..., and Record is Unassigned. Below the table, there are several icons and a 'Was The Tour Satisfactory?' section. At the bottom, there is a table with columns: Action, Type, Created By, To Be Done By, Date Due, Priority, Status, and Attachments. The first row shows Action R55 North Soft Matter Lab Entrance door: CHIP Poster plus for review, Type Module, Created By Duncan, To Be Done By Andy Church, Date Due 30/12/2022, Priority Medium, Status Not, and Attachments 0.

To Add an Action from the Tour select '+New Record' where you will be given a new window to add the details.

A brief description of the contents of this page will follow:
The critical information that must be added is highlighted by an asterisk *.

The following fields are completed by the person assigned the action.

Input	Description
Issue Number: 42	Issue Date: 04/11/2022
Author: G. J Baker	Page 9 of 16

Current Status	Not Started/In Progress/Completed (On setup this is automatically defined as 'Not Started')
Completed Percent	A gauge to record the level of action completion.
Completed Date	Date action is completed.
Action Taken	Any specific details that would be useful to record how the action was completed.

When selecting who the action is 'FOR', it is possible to search by an individual's 'User Name', their 'Full Name' (or part of it) or their 'Email Address' as illustrated below:

The screenshot shows a 'Select' dialog box with a search bar and a table of users. The table has four columns: User, Full Name, Email, and Org Unit. The first 10 entries are as follows:

User	Full Name	Email	Org Unit
zsuzsanna.mozsary@stfc.ac.uk	Zsuzsanna Mozsary	zsuzsanna.mozsary@stfc.ac.uk	Technology
zoe.williams@stfc.ac.uk	Zoe Williams	zoe.williams@stfc.ac.uk	Business Development
zoe.propper@stfc.ac.uk	Zoe Propper	zoe.propper@stfc.ac.uk	Human Resources and Change Management
zoe.jones@stfc.ac.uk	Zoe Jones	zoe.jones@stfc.ac.uk	ISIS
zoe.hill@stfc.ac.uk	Zoe Hill	zoe.hill@stfc.ac.uk	Campus Development
zoe.clark@stfc.ac.uk	Zoe Clark	zoe.clark@stfc.ac.uk	ISIS
zoe.bowden@stfc.ac.uk	Zoe Bowden	zoe.bowden@stfc.ac.uk	ISIS
zina.fellows@stfc.ac.uk	Zina Fellows	zina.fellows@stfc.ac.uk	Finance
zhige.zhang@stfc.ac.uk	Gary Zhang	zhige.zhang@stfc.ac.uk	Particle Physics
zena.davis@stfc.ac.uk	Zena Davis	zena.davis@stfc.ac.uk	Executive Support Office

Showing 1 to 10 of 2,284 entries

1 2 3 4 5 Next → Last

Close

Click on the person required and then click 'Close'.

N.B. The email address will normally be included in the display window but have been removed from the above image due to open distribution of this document.

1.2.1 Email Notification

Once the details have been completed and the record saved, an email with the details will be sent to the person on who the action has been assigned.

A further reminder email will also be sent to the 'action person' approximately 7 days before the due completion date. The person responsible for the action can enter SHE Assure and record the level of progress i.e. percentage completed, if the action requires significant time, or change the status to 'Completed' once the action has been done. No further reminder emails will be issued after completion and the action has been marked 'Completed'.

If the action has not been completed by the specified date then the individual and their Line Manager will be notified by email. Even if the action is completed, and the record not amended in SHE Assure, the Line Manager will be sent an email regarding the action, so it is important that the correct status of the action is recorded. This will continue at a similar 7 day interval until the action is recorded as completed.

An example notification email is shown below.

From: stfc220417-no-reply@sheassure.net [mailto:stfc220417-no-reply@sheassure.net]

Sent: 04 January 2018 11:09

To: Harris, Garth (STFC,RAL,CSD)

Subject: SHE Assure Approval Notification

A record in the Incident Record module of SHE Assure with reference 11 assigned to you for submission has had due date amended by Gareth Baker.

Original Submission Due Date: Due date not set.

New Submission Due Date: 03/01/2018

On: 04/01/2018

Comments:

<http://staging.sheassure.net/stfc220417/Approval/Index/9932428>

1.3 Completing Actions

It is very important that the Actions are recorded as 'Completed' when they have been done. This can be done by the person responsible for the action entering Evotix Assure and following the procedure below:

N.B. Failure to close the action will result in the system continuing to issue emails regarding the action.

Anyone who has an action assigned to them can view their actions from the home page of Evotix Assure. By selecting 'View Outstanding Actions' a list of actions to be completed will be generated.

The screenshot displays the 'My Tasks' section of the Evotix Assure interface. On the left is a dark blue sidebar with icons for Home, Modules, Tasks, Portal Queue, Attachments, and Insights+. The main content area has a light grey background. At the top, there's a header with 'Home' and 'Org Unit: > Science and Technology Facilities C'. Below this, the 'My Tasks' section is highlighted with a red circle. It shows two task cards, each with a yellow banner indicating '1474 days until due'. The tasks are titled 'Review Required' and describe a 'DSE Assessment awaiting review' created by Gareth Baker. A 'View 2 Task(s) >' link is visible in the top right of the task list area.

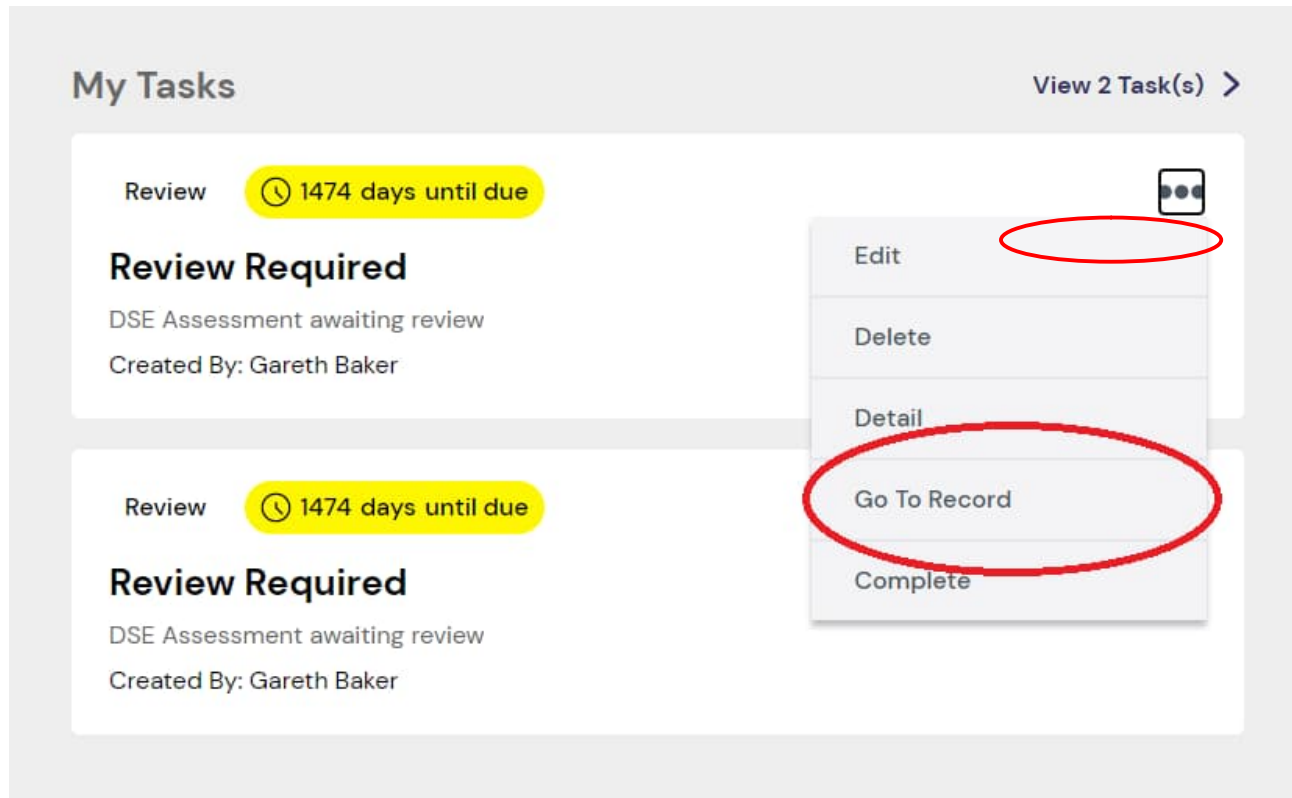
The status of any action can be updated by opening the action, changing the status, Complete (%) and Completion Date as appropriate.

N.B. Only the person creating the action or the SHE Group can change the due date of the action if there is a sufficiently good reason to do so.

1.4 Action attached to Safety Tour record

If a person assigned an action wishes to see the overall Safety Tour from which the action has been created, for more information regarding areas toured etc. then the following instructions apply.

Open 'My Tasks' as above and use the 'three dots' at the end of the row to choose 'Go To Record':.



Other options here:

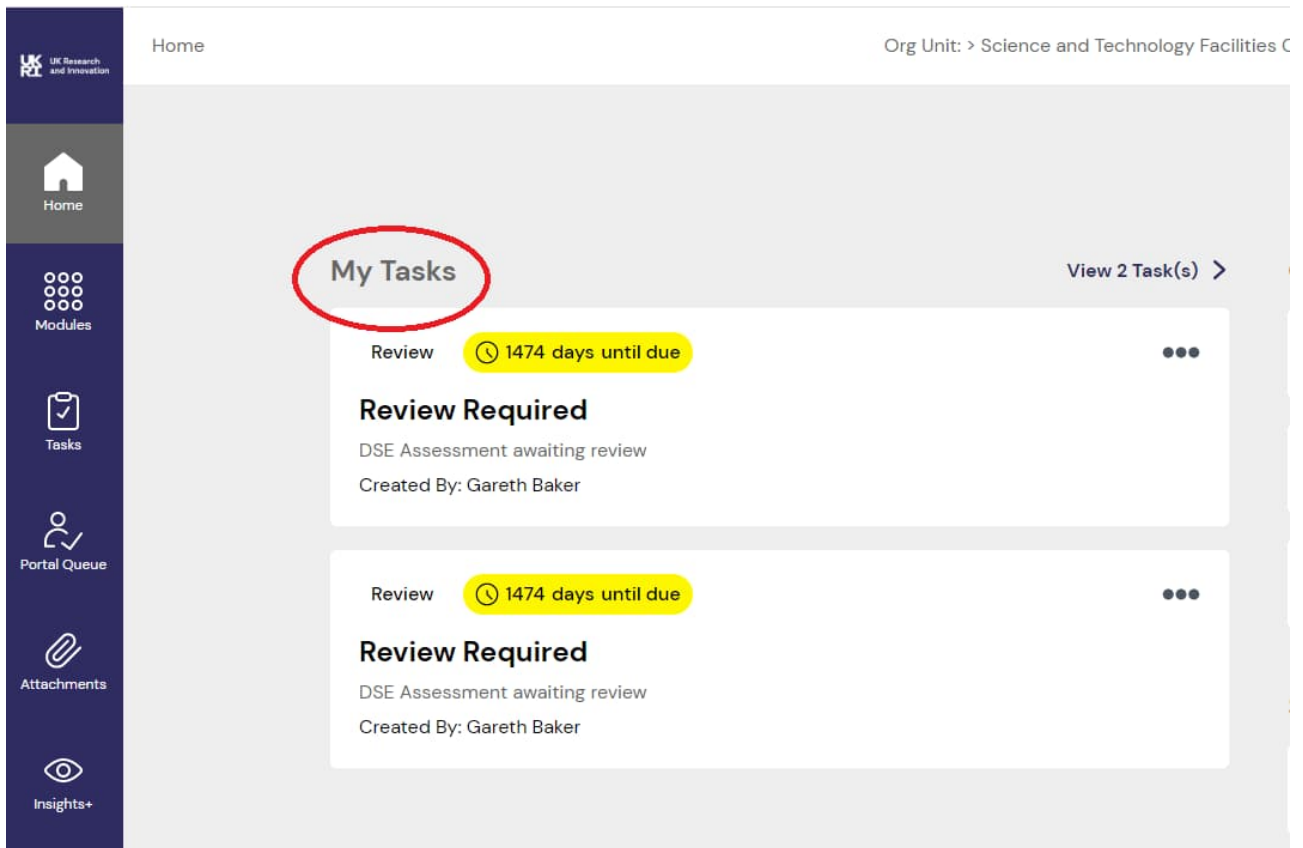
- Complete – If you have completed the action
- Edit – If you wish to make a note of the progress towards completing the action.

1.5 Final Sign-Off

Once the action has been completed and Evotix Assure used to report this completion then the person who assigned the action should close it out.

1.6 Action Summary

From the home page in Evotix Assure you can view the state of any actions/tasks you have in the system.

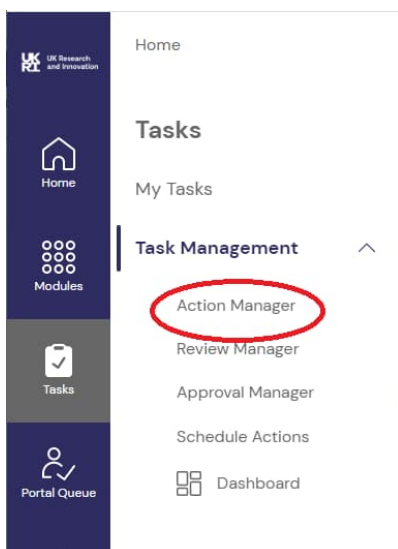


Use the 'three dots' at the end of each row to either 'Edit' the action/task directly or 'Go To Records' to enter the record in which the action was created.

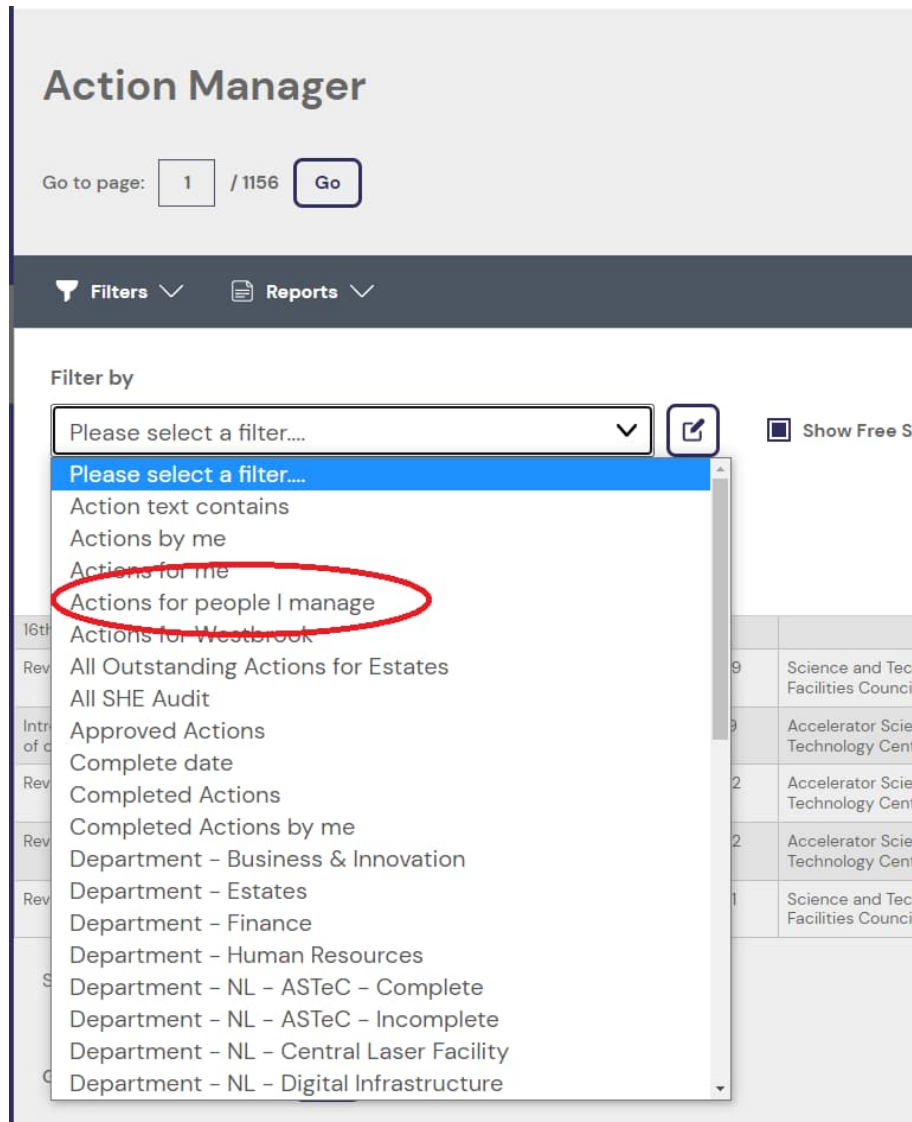
1.7 Manager Summaries

Managers can get a report on what actions are overdue for people they manage.

From the main system choose Tasks->Task Management->Action Manager:

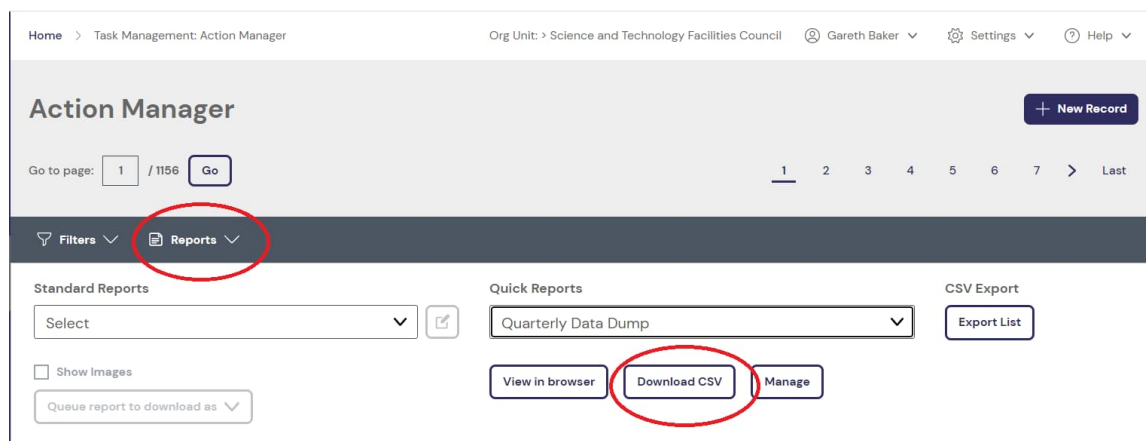


This will bring up a list of actions:



Click on Filters and then choose either 'Actions for people I manage' or 'Outstanding actions for people I manage'. This will reduce the list accordingly.

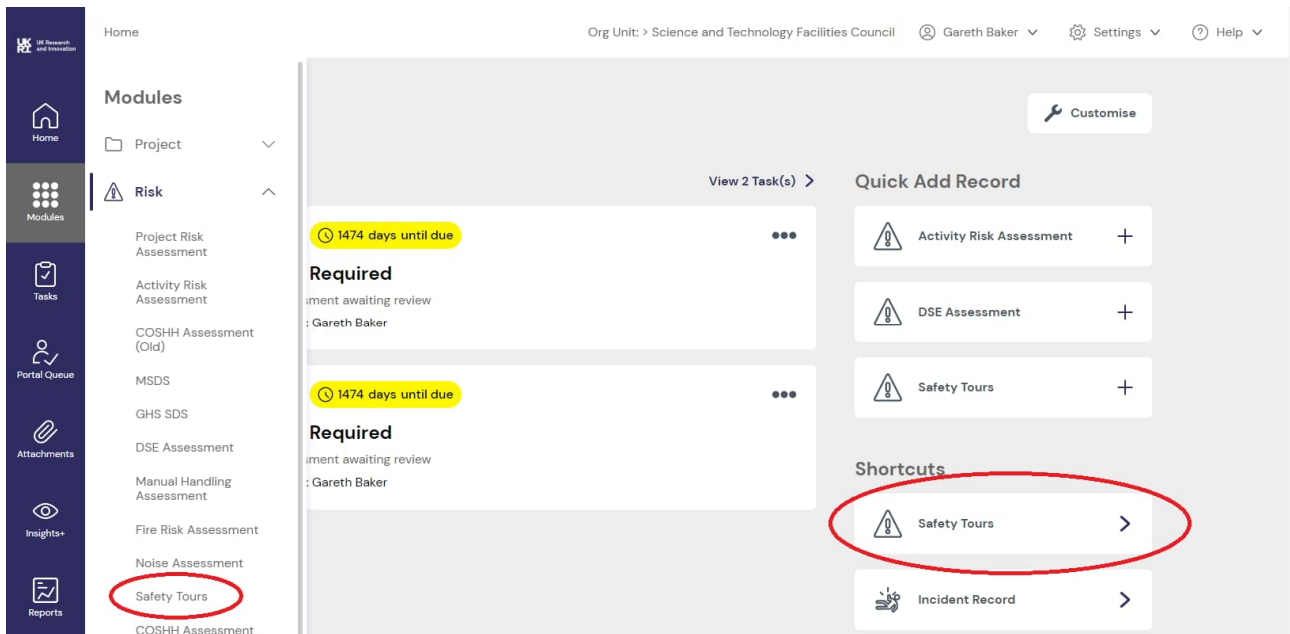
The list can then be exported to Excel using the Reports option and choosing either 'Action Summary Report' or 'Action Summary Report with Completed Details' from the Standard Reports drop-down.



2. REPORTS ON ACTIONS

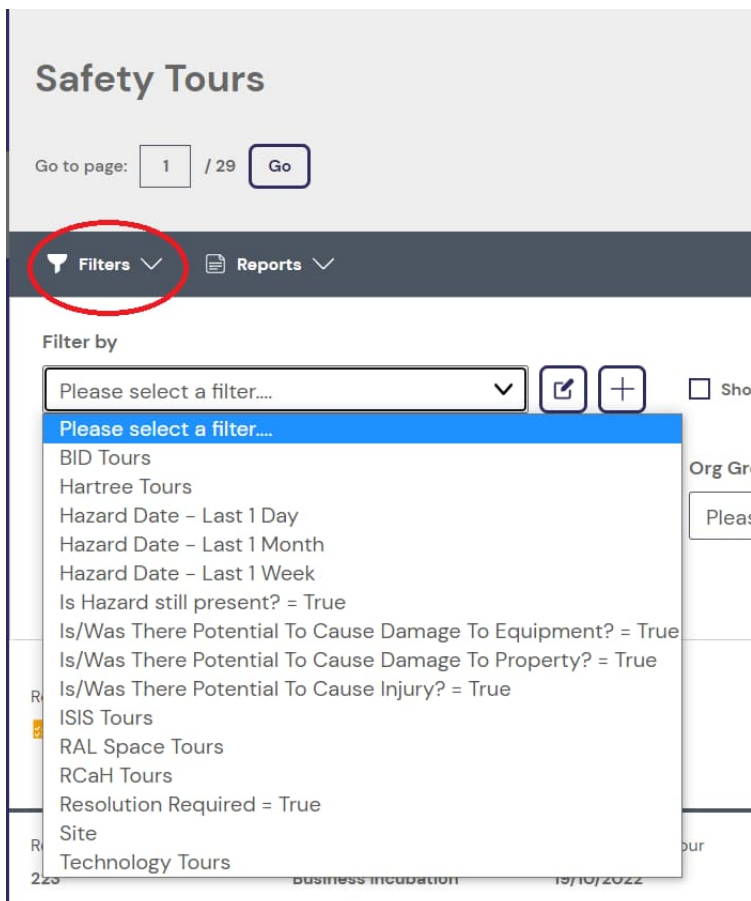
In order to report on actions completed or outstanding from Safety Tours etc. a report can be created to summarise the tour actions.

This is achieved inside the 'Safety Tour' module:



Choose either method of entering the Safety Tour module.

Then set up a filter:



Find the Tour report you are interested in and click on the icon highlighted:

Reference	Org Unit	Date of Safety Tour	Location	Safety Tour Team Members	Record is Unassigned	...
230	ISIS	26/10/2022	R55 Sample Environment Labs	Duncan Francis, Xavier Queralt, Bhavin Patel, Brian...	In Progress	
Related	Was The Tour Satisfactory?	Review Date	Last update		Submit	Approve
24	Yes	No Review Set	03/11/2022 11:58:00		Archive	

The number indicates how many actions have been entered, the colour gives some indication on status of those actions

The status of all the actions from the tour will be presented:

Action

+ New Record

Reference

230

Org Unit

ISIS

Date of Safety Tour

26/10/2022

Location

R55 Sample Environment Labs

Safety Tour Team Members

Duncan Francis, Xavier Queralt, Bhavin Patel, Brian...

Record is Unassigned

In Progress

Submit

Approve

Archive

Related

24

Was The Tour Satisfactory?

Yes

Review Date

No Review Set

Last update

03/11/2022 11:58:00

Action	Type	Created By	To Be Done By	Date Due	Priority	Status	Attachments	
R55 North, Soft Matter Lab Entrance door, CHIP Poster due for review.	Module	Duncan Francis	Andy Church	31/12/2022	Medium	Not Started	0	
R55 North, Soft Matter Lab, PAT Testing out of date.	Module	Duncan Francis	Andy Church	31/12/2022	Medium	Not Started	0	
R55 North, Soft Matter Lab. There is no label on what appears to be a compressed air line.	Module	Duncan Francis	Andy Church	31/12/2022	Medium	Not Started	0	
R55 North Soft Matter Lab. Inert gases piped into lab but no sign of O2 depletion monitoring.	Module	Duncan Francis	Andy Church	30/11/2022	High	Not Started	0	
R55 South Electronics Lab. No evidence of COSHH Sheets or MSDS for the chemicals Cupboard.	Module	Duncan Francis	Steve Payne	31/12/2022	Medium	Not Started	0	
R55 South Electronics Lab. Some items not PAT Tested.	Module	Duncan Francis	Steve Payne	30/11/2022	Medium	Not Started	0	
R55 South Electronics Lab. Generally poor untidy state and build-up of combustible material	Module	Duncan Francis	Steve Payne	30/11/2022	Medium	Not Started	0	
R55 South, Pressure Furnace Lab Office. Food/Drink making facilities in same room as oils and chemicals.	Module	Duncan Francis	Chris Goodway	30/11/2022	Medium	Completed	0	
R55 South Pressure Furnace Lab. Some items stored on top of cupboards.	Module	Duncan Francis	Chris Goodway	31/12/2022	Medium	Not Started	0	
R55 South Pressure Furnace Lab Office. Face visors left face down on work bench.	Module	Duncan Francis	Chris Goodway	30/11/2022	Medium	Completed	0	

Showing 1 to 10 of 24 entries

Clicking on the 'three dots' and choosing 'Report' will present a report which can be exported as a PDF or to Word or Excel.