CHARM Overdue Tasks Report

1.1. Introduction

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

1.2. Privacy of Information

Reports generated from CHARM 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

HSRs can generate reports via their own CHARM log-in and dashboard for their HSR 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

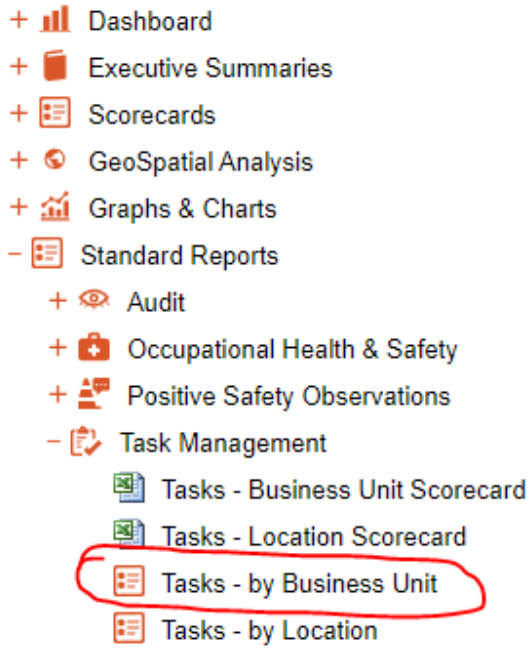
Tasks (corrective actions) report

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 CHARM icon to access CHARM

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**

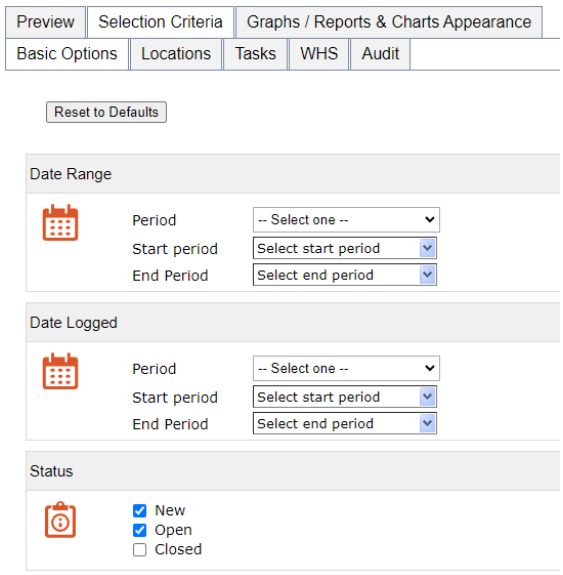


7. Click on the **Selection Criteria** tab

8. Select your **Date Range** using the calendar drop down lists

9. Under "**Status**" tick the **New** and **Open** checkboxes to view tasks for new and open checklists.

Note: The Closed checkbox is not required to be ticked as these actions will already be completed.



10. Click on the **Tasks** tab

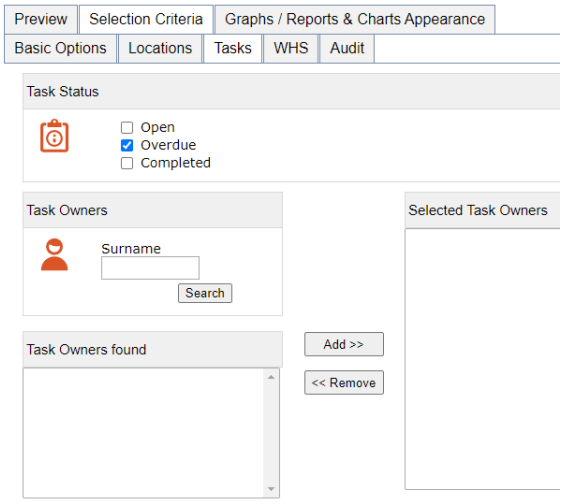
11. Tick the "Open" and "Overdue" check boxes

Optional

12. **Task Owners**

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 **Add>>** to add the user to the Selected Task Owners section.



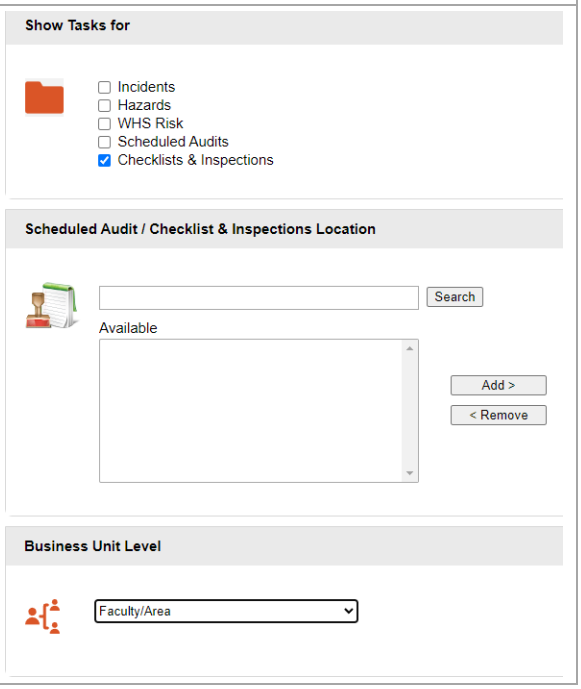
13. Click on the **"preview"** tab

14. **Under "Show Tasks for"** Check the **Checklists & Inspections** checkboxes to view overdue tasks for the Checklists and Inspections module.

15. Under **Scheduled Audit / Checklist & Inspections Location** search for the building/s where the inspection was conducted and then click the **Add>** button.

16. **Business Unit Level:** select **Level 3** from the drop down list

17. Click on the **Submit** button at the bottom of the page



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

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

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

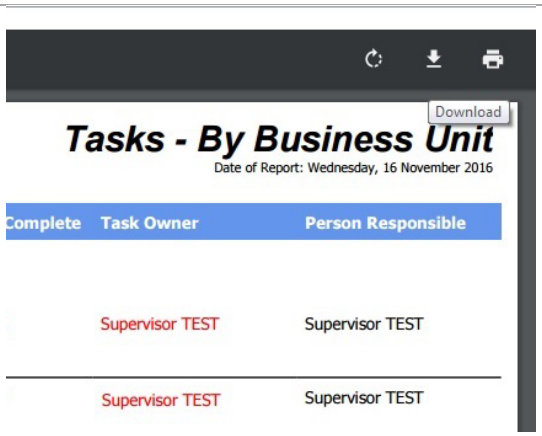
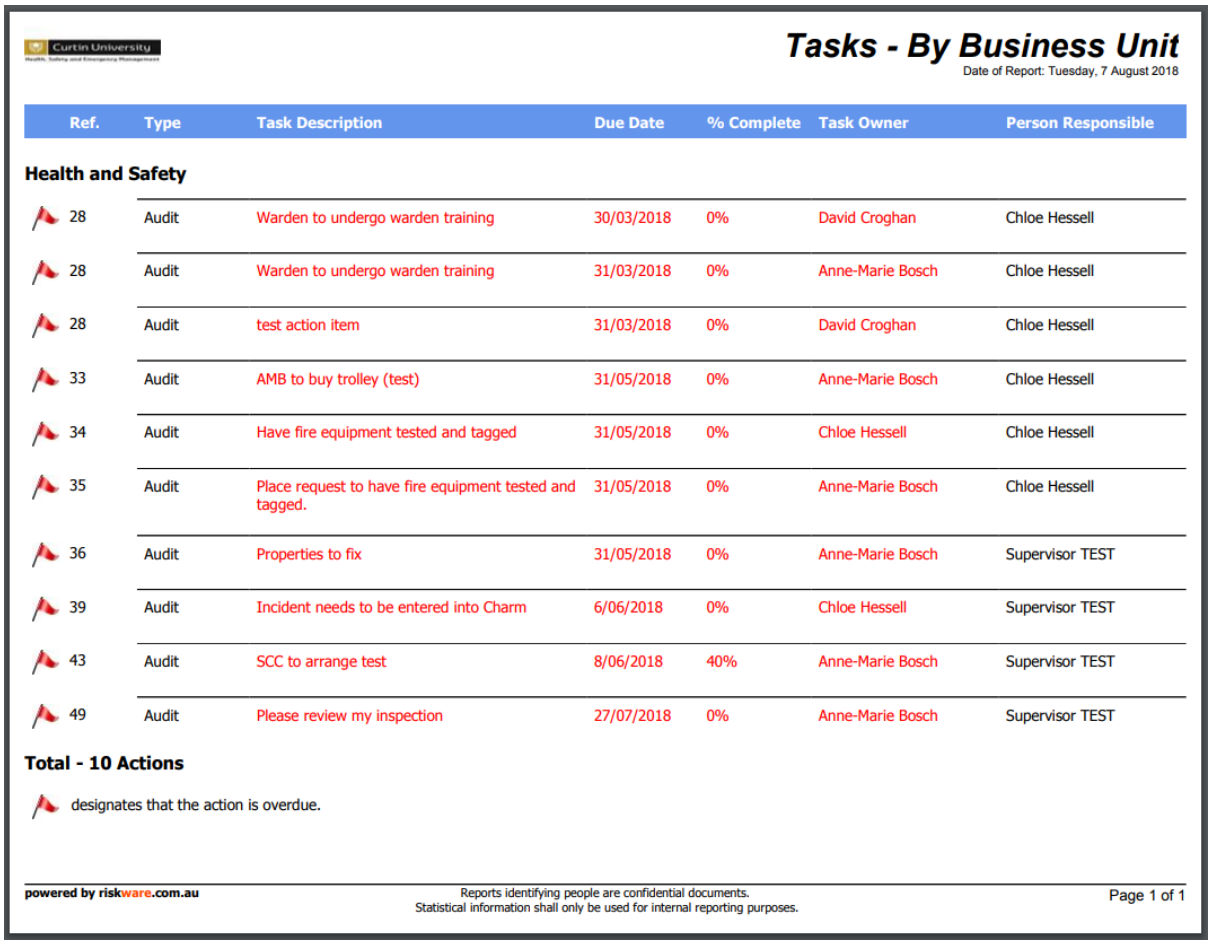


Figure 5. Example: Overdue Tasks report



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Tasks - By Business Unit

Date of Report: Tuesday, 7 August 2018

Ref.	Type	Task Description	Due Date	% Complete	Task Owner	Person Responsible
Health and Safety						
28	Audit	Warden to undergo warden training	30/03/2018	0%	David Croghan	Chloe Hessell
28	Audit	Warden to undergo warden training	31/03/2018	0%	Anne-Marie Bosch	Chloe Hessell
28	Audit	test action item	31/03/2018	0%	David Croghan	Chloe Hessell
33	Audit	AMB to buy trolley (test)	31/05/2018	0%	Anne-Marie Bosch	Chloe Hessell
34	Audit	Have fire equipment tested and tagged	31/05/2018	0%	Chloe Hessell	Chloe Hessell
35	Audit	Place request to have fire equipment tested and tagged.	31/05/2018	0%	Anne-Marie Bosch	Chloe Hessell
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 Hessell	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

Total - 10 Actions

designates that the action is overdue.

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

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