



ACTION LIST

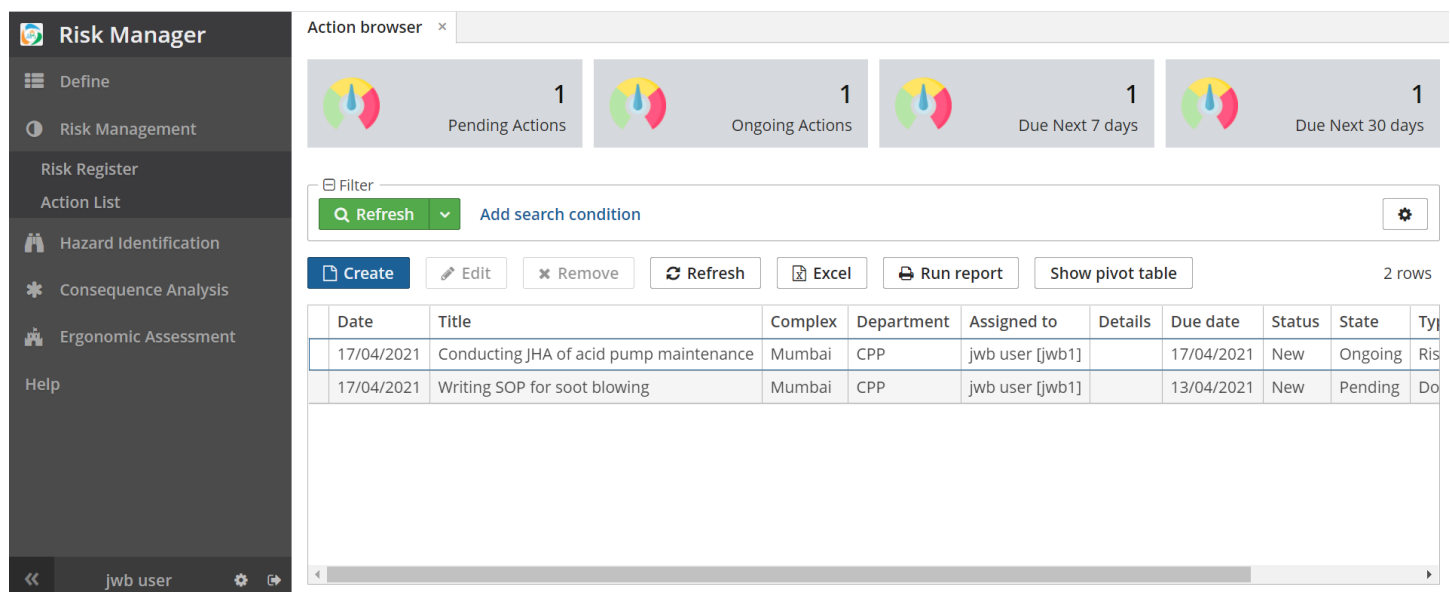
Manage CAPA, Manage Risks

Action List

Risk assessments will generate corrective & preventive Actions (CAPA). Management and tracking of these actions is very important for reducing risks at workplace. Users can record, track and manage actions in SheelRisk.

Corrective and preventive action (CAPA or simply corrective action) consists of improvements to an organization's processes taken to eliminate causes of non-conformities or other undesirable situations. It is usually a set of actions emanating from risk assessment process that require an organization to take in manufacturing, documentation, procedures, or systems to rectify and eliminate recurring non-conformance.

To open Action list, click [Risk Management/Action List](#) in sidebar. This will open browse screen listing all actions recorded into system.

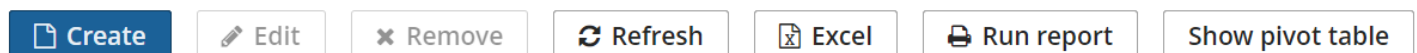


Date	Title	Complex	Department	Assigned to	Details	Due date	Status	State	Type
17/04/2021	Conducting JHA of acid pump maintenance	Mumbai	CPP	jwb user [jwb1]		17/04/2021	New	Ongoing	Ris
17/04/2021	Writing SOP for soot blowing	Mumbai	CPP	jwb user [jwb1]		13/04/2021	New	Pending	Do

The screen has four items – Dashboard, Filter, Top toolbar and table of records. Local dashboard shows basic statistics of the recorded actions. User can filter data using filter box. Toolbar has buttons for different data operations like create, edit and delete. Table of records list all recorded data and can be sorted by clicking on the heading of columns.

Toolbar

Toolbar contain following buttons-

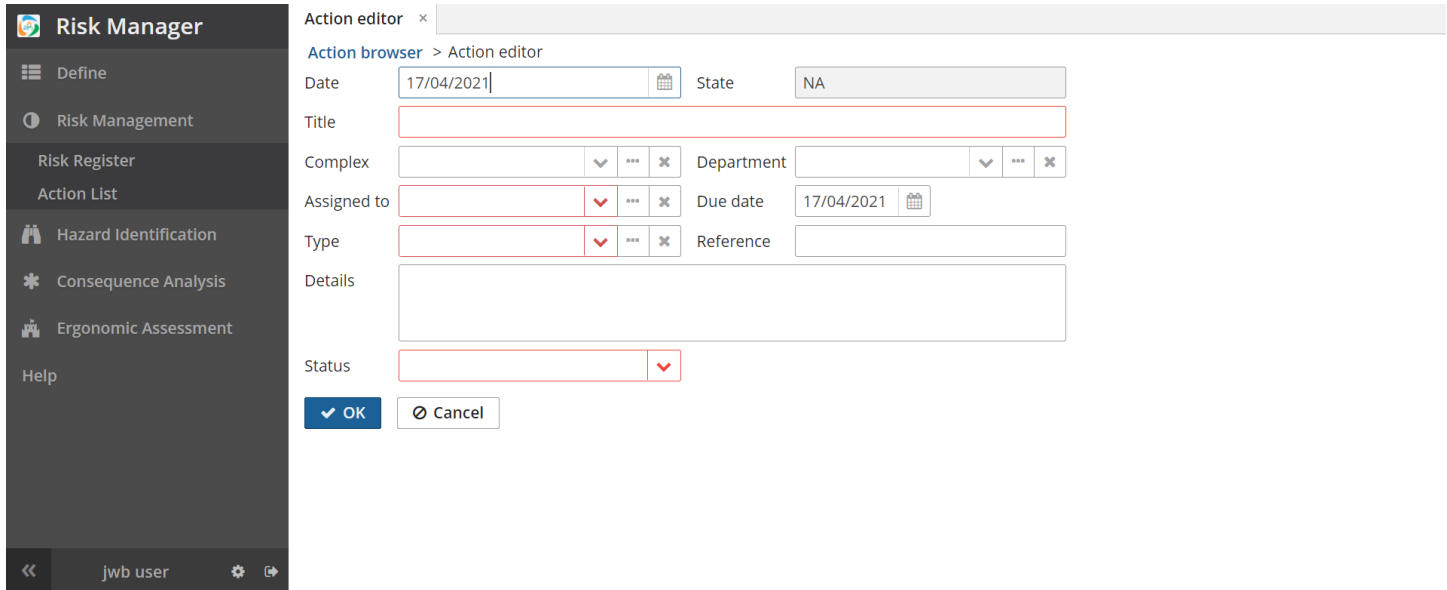


Create	To record new Action
Edit	To edit the selected Action
Remove	To delete the selected Action
Refresh	To refresh the data in table

Excel	To export the table data in Microsoft Excel Format
Run Report	To generate report
Show pivot Grid	To analyze data in pivot grid tool

Adding New Action

To add new risk to database, click [Create](#) button in top toolbar, this will open Add/Edit screen.



The screenshot shows the 'Action editor' form in the Risk Manager application. The form includes the following fields:

- Date:** 17/04/2021 (with a calendar icon)
- State:** NA
- Title:** (empty text input field)
- Complex:** (dropdown menu with a clear icon)
- Department:** (dropdown menu with a clear icon)
- Assigned to:** (dropdown menu with a clear icon)
- Due date:** 17/04/2021 (with a calendar icon)
- Type:** (dropdown menu with a clear icon)
- Reference:** (empty text input field)
- Details:** (empty text area)
- Status:** (dropdown menu)

At the bottom of the form, there are two buttons: 'OK' and 'Cancel'.

User has to enter data in this screen. All data to be entered are self-explanatory but special data and their meaning is explained below.

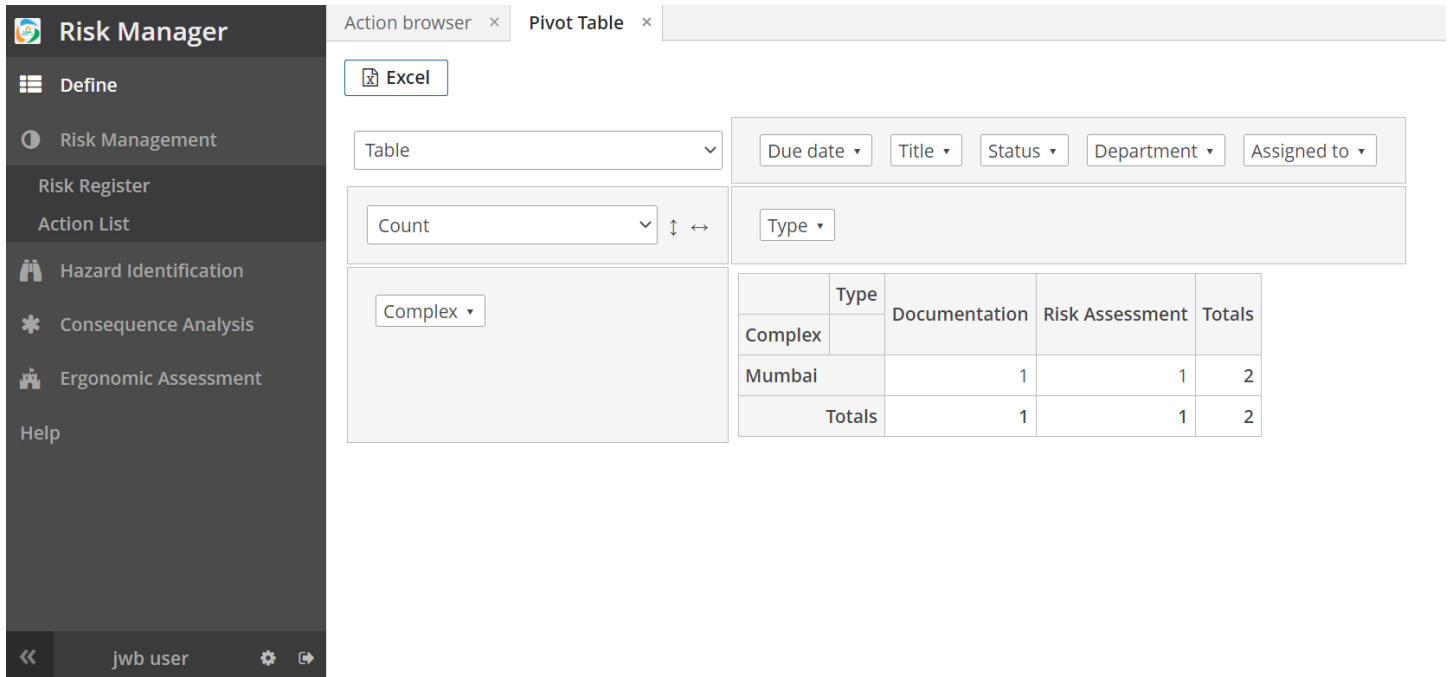
- Status – Possible selection – New, Closed, Cancelled
- Reference – the reference number of risk assessment if any.

Analysis of Actions

The state of action will be automatically calculated based on due date and status. If due date has passed and still action is not closed, then it will be marked PENDING.

SheelRisk has numerous utilities to analyze actions.

- Dashboard shows basic statistics of the actions like pending actions, ongoing actions, actions due in next 7 days and action due in next 30 days.
- Data can be filtered using filter box.
- Pivot analysis of data has lot of ways by which data can be analyzed.



The screenshot displays the Risk Manager application interface. On the left is a dark sidebar with the following menu items: Define, Risk Management, Risk Register, Action List, Hazard Identification, Consequence Analysis, Ergonomic Assessment, and Help. The main content area is titled 'Pivot Table' and contains an 'Excel' button, a 'Table' dropdown, and several filter dropdowns: 'Due date', 'Title', 'Status', 'Department', and 'Assigned to'. Below these are 'Count' and 'Type' dropdowns, and a 'Complex' dropdown. A Pivot Table is displayed with the following data:

	Type	Documentation	Risk Assessment	Totals
Complex				
Mumbai		1	1	2
	Totals	1	1	2

Reporting

The action database can be formatted for reporting by following-

- Data can be exported to MS Excel by clicking Excel Button in top toolbar.
- Data can be sorted/filtered.
- Detailed report of a particular risk can be printed in MS work format by Run Report button in top tool bar.
- Pivot analysis data can also be exported to Excel and Charts can also be saved as image file.



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