



D A M S T R A

Manage Third Party /
Visitors

Safety

[DISCLAIMER]

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Manage Third Party / Visitors Introduction

Editing or removing records of Third Parties / Visitors is managed via the *Third Party/Visitor Register*. This is found under *People* in the Menu Bar.

The screenshot displays the DAMSTRA dashboard with a sidebar menu on the left. The 'People' menu item is highlighted, and a sub-menu is open showing 'Third Party/Visitor' as the selected option. The main content area is titled 'My Dashboard' and contains several data visualization components:

- All Records:** A dropdown menu set to 'All Records' and a date range selector for '8/19/1979 - 31/12/2037'. An 'Export Corrective Action Data' button is visible.
- My Corrective Actions:** A bar chart showing counts for 'Completed', 'Undervalued', 'Not Started', and 'Overdue < 30 Days'.
- All Corrective Actions:** A bar chart showing counts for 'Completed', 'Undervalued', 'Not Started', and 'Overdue < 30 Days'.
- Hazard Corrective Actions:** A bar chart showing counts for 'Completed', 'Undervalued', 'Not Started', and 'Overdue < 30 Days'.
- Incident Corrective Actions:** A bar chart showing counts for 'Completed', 'Undervalued', 'Not Started', and 'Overdue < 30 Days'.

An inset window titled 'Third Party' is overlaid on the dashboard, displaying a table with columns for 'ID', 'Last Name', 'First Name', 'Date of Birth', 'Mails', and 'Email'. The table contains several rows of data. A 'Help' button is located in the bottom right corner of the inset window.

<https://demo-00.usa1gic.com/personnel/thirdParty/index>

Manage Third Party / Visitors

Edit Person

Locate the person involved and **click** 'Actions', then 'Edit'.

Third Party

My Filters
No filter saved.

Filters
 Show Archived People

Search

Show 15 entries

Apply Clear

Save this filter
Filter Name

Save

Search: greenwell

ID	Last Name	First Name	Date of Birth	Mobile	Email
69	Greenwell	Dean			dean.greenwell@email.co.nz

Showing 1 to 1 of 1 entries

Actions

- View
- Edit
- Delete
- Archive

Manage Third Party / Visitors

Amend Details

Amend the person's details by adding or overtyping existing information.

Click 'Save' to return to the Third Party/Visitor Register.

The screenshot shows a web application interface for editing a third party's details. The page title is "Third Party / Edit Third Party - 69". The form includes the following fields:

- Site *: Vault Intelligence → ABC Industries Australia → New South Wales → Sydney → Finance → New Forest
- First Name *: Dean
- Last Name *: Greenwell
- Sex: Male
- Date of Birth: [Empty field with a calendar icon]
- Mobile: [Empty field]
- Street Address: [Empty field]
- Suburb: [Empty field]
- City: [Empty field]
- Work Phone: [Empty field]
- Home Phone: [Empty field]
- Email: dean.greenwell@gmail.com

At the bottom of the form, there is an orange "Save" button and a grey "Cancel" button.

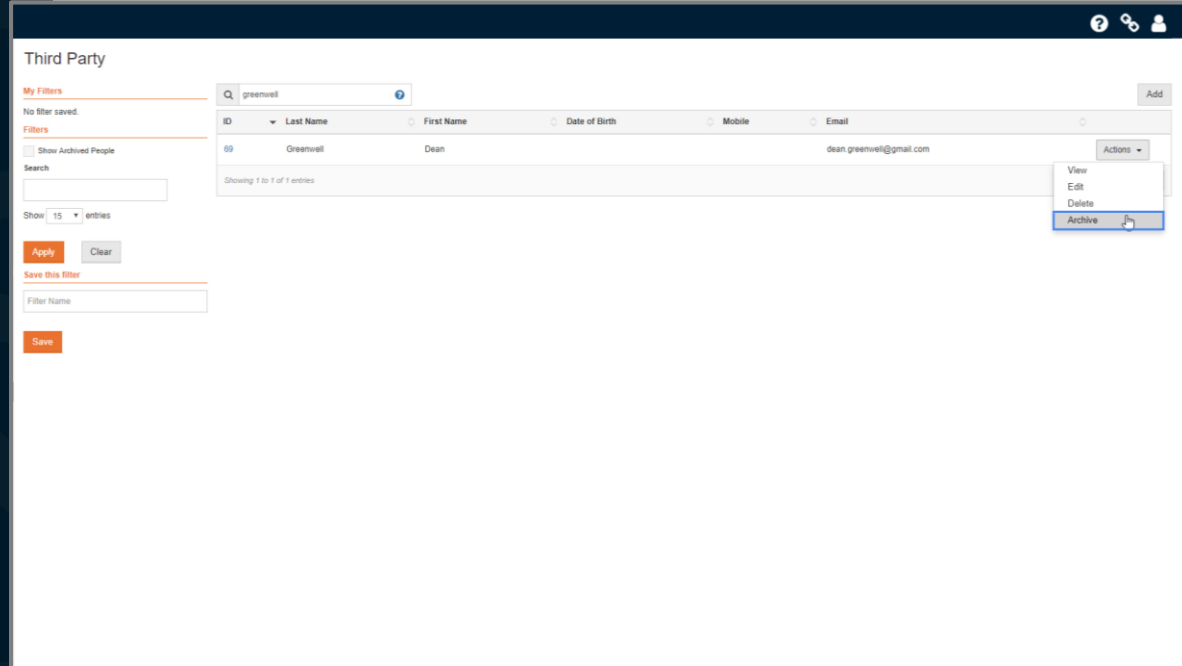
Manage Third Party / Visitors

Archive Person

There are two ways to remove a Third Party / Visitor record from your system:

The first is to **archive** the person. This removes the person from the Third Party / Visitor Register, but stores a copy of their data should it be required in the future. This is the recommended method of removing a person.

To do this, **click** 'Actions', then 'Archive'.



The screenshot displays the 'Third Party' management interface. At the top, there is a search bar containing 'greenwell' and an 'Add' button. Below the search bar is a table with columns for ID, Last Name, First Name, Date of Birth, Mobile, and Email. The table contains one entry: ID 09, Last Name Greenwell, First Name Dean, and Email dean.greenwell@gmail.com. To the right of the table is an 'Actions' dropdown menu with options: View, Edit, Delete, and Archive. The 'Archive' option is highlighted with a mouse cursor. Below the table, there is a 'Showing 1 to 1 of 1 entries' indicator. On the left side of the interface, there is a 'My Filters' section with a 'No filter saved.' message, a 'Filters' section with a 'Show Archived People' checkbox, a search bar, and a 'Show: 15 entries' dropdown. Below this is an 'Apply' button and a 'Clear' button. Further down is a 'Save this filter' section with a 'Filter Name' input field and a 'Save' button.

Manage Third Party / Visitors

Unarchive Person

If you've made a mistake or you need to restore the person for any reason, unarchiving a person is easy.

From the filters sidebar, **click** 'Show Archived People', then **supply** some detail for that person, e.g. their name.

Click 'Apply'. With the archived person found, **click** 'Actions', then 'Unarchive'.

The person is restored to the Third Party / Visitor Register.

The image displays two screenshots of a web application interface for managing third parties. The top screenshot shows the 'Third Party' page with a sidebar on the left containing a 'My Filters' section. Under 'Filters', the 'Show Archived People' checkbox is checked. A search box contains the text 'greenwell'. Below the search box, the 'Apply' button is highlighted with a blue border. The main content area shows a table with one entry: ID 69, Last Name Greenwell, First Name Dean, and Email dean.greenwell@gmail.com. The 'Actions' dropdown menu is visible on the right side of the table. The bottom screenshot shows the same interface, but the 'Actions' dropdown menu is open, and the 'Unarchive' option is highlighted with a blue border.

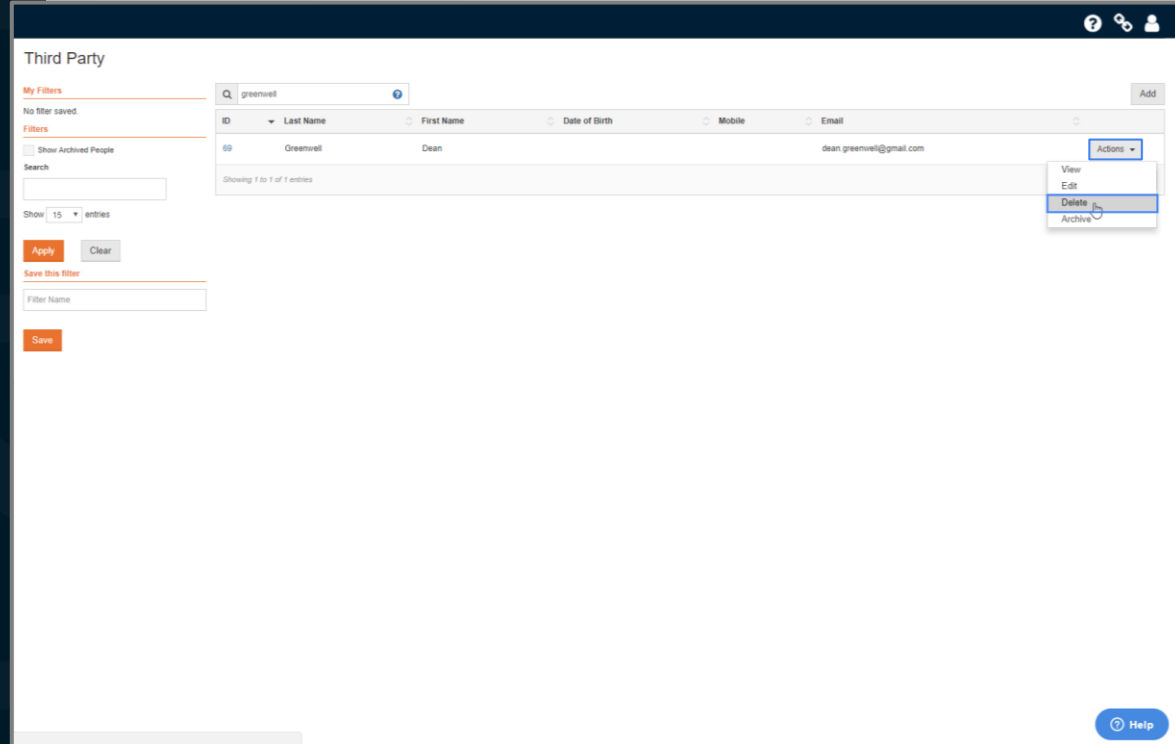
Manage Third Party / Visitors

Delete Person

The second removal method is to **delete** the person.

Your Organisation may have disabled this feature.

To do this, **click** 'Actions', then 'Delete'.



The screenshot displays the 'Third Party' management interface. On the left, there are sections for 'My Filters' (with 'No filter saved'), 'Filters', and a search bar. The main area shows a table with columns for ID, Last Name, First Name, Date of Birth, Mobile, and Email. A single entry is visible: ID 69, Last Name Greenwell, First Name Dean, and Email dean.greenwell@gmail.com. An 'Actions' dropdown menu is open over the entry, with options for View, Edit, Delete, and Archive. The 'Delete' option is highlighted. At the bottom right, there is a 'Help' button.

ID	Last Name	First Name	Date of Birth	Mobile	Email
69	Greenwell	Dean			dean.greenwell@gmail.com

