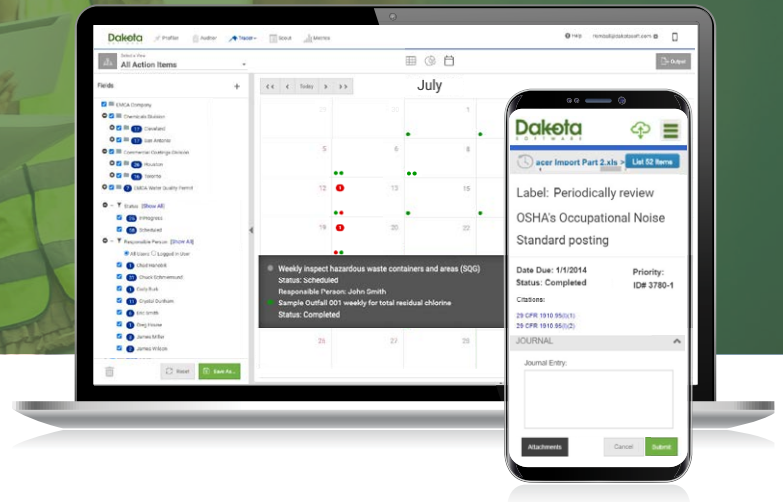


Action Item Management

Manage and track EHS compliance tasks and action items across the organization



SOLUTION OVERVIEW

To effectively manage compliance and mitigate risk, EHS leaders need full visibility into the status of Corrective and Preventive Actions (CAPAs) across their locations. With shifting priorities, changing policies, and staff turnover, tracking Action Items to completion can be challenging. Add to that changing regulatory requirements, and it's no wonder many organizations face compliance uncertainty and open-ended risk.

Dakota Tracer consolidates Action Items originating from action plans, audit findings, and incidents and issues to provide real-time visibility throughout the organization. Its integration with **Dakota Profiler** helps ensure Compliance Calendars are always accurate and employees have the information they need to complete their tasks on time. Automated email alerts keep things on track and interactive dashboards help EHS leaders analyze performance and identify areas of risk.

Tracer

- ✓ Centralize compliance tasks and Corrective and Preventive Actions
- ✓ Provide guidance with links to a plain-language Regulatory Library
- ✓ Establish accountability with automated email alerts
- ✓ Improve visibility into compliance status across the organization
- ✓ Analyze performance and identify trends across locations

Why Dakota?

"Tracer simplifies tracking of our compliance activities and provides us with visibility into open action items at all levels of the organization."

Centralize action tracking and analysis

Tracer centralizes Action Items originating from regulatory profiles, audits, incidents, and action plans. Completion Scorecards help site leaders evaluate team performance and interactive dashboards allow corporate EHS leaders to identify compliance gaps and trends across facilities.

Drive proactive EHS compliance

Facility-specific regulatory profiles drive local compliance plans while synchronizing global EHS programs. Color-coded Compliance Calendars show which tasks are complete, which are overdue, and indicate when related regulatory changes have occurred.

Provide guidance and accountability

Action Items are linked to related citations, audit questions, and events. The bulk edit feature allows groups of tasks to easily be assigned to users by role and reassigned when needed. Automated email alerts keep site leaders informed and time-stamped Event Logs document all changes.



Related Solutions

EHS Compliance Planning

EHS Audit & Inspection Management

Incident & Event Management

Behavior-based Safety

Sustainability Tracking & Reporting

Training & Learning Management

Platform Features

User Engagement

- ✓ Easy access via Single sign-on (SSO)
- ✓ In-product Guides and contextual Help menus
- ✓ Live Chat, Web Training, and User Events

Enhanced Collaboration

- ✓ Multi-language translation of menus and forms
- ✓ Centralized, secure repository for documents
- ✓ Time-stamped event log of all user actions
- ✓ User-defined email notifications and reminders

Flexible & Accessible

- ✓ Configurable locations, forms, dashboards, and alerts
- ✓ Permission-based access by User Profile & Personality
- ✓ User-defined email alerts with item-specific links

Business Intelligence

- ✓ System and user-defined data views & dashboards
- ✓ Standard and configurable outputs & reports
- ✓ Interactive data exploration using *Parametric Filtering™*
- ✓ Configurable Home Screen with one-click data access