



Safety Technology Challenge Innovation

Axnosis

Demo script – Behaviour Based Safety Mobile App

Microsoft Dynamics 365 FO



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Foreword

Behaviour Based Safety (BBS) is a process that informs management and employees of the overall safety of the workplace through safety observations. BBS is intended to focus workers' attention on their own and their peers' daily safety behaviour. The goal of a BBS program is to improve the employee safety of the organization.

To assist the process, a mobile app exists to support the above functionality. The app engages directly with HSE 365 - a sub-module inside Dynamics 365 FO.

Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
TEST SCRIPTS – MMC_TRN_BBS	22/10/2021	0.2	HENNIE VAN DEN BERG

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY

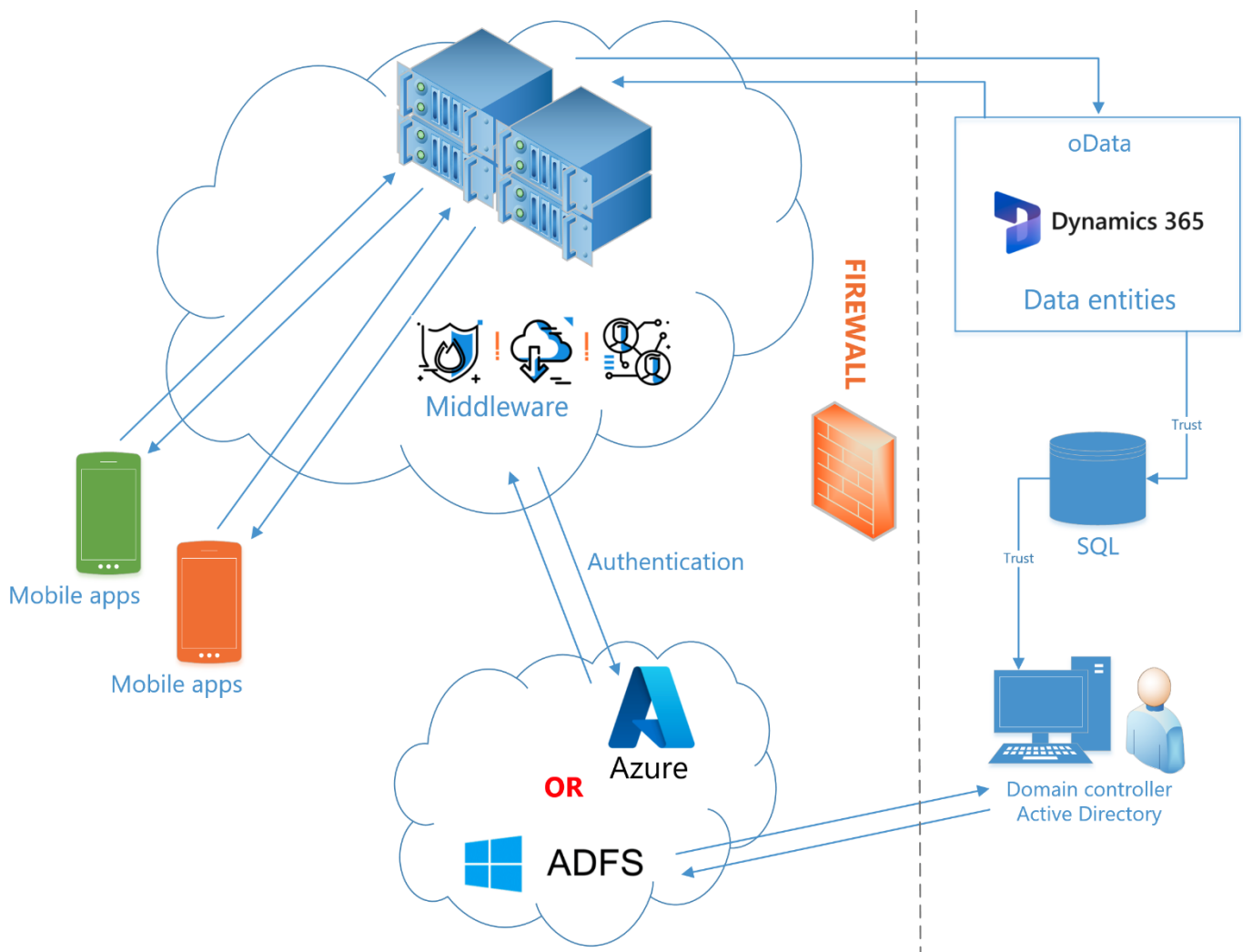
Table 2: Change and Version History

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1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
 - OHS & GRC modules
- Ionic/Angular standalone applications
 - Incident reporting mobile application



2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis BBS mobile app.
- The user must download either of the following mobile applications, dependent on the phone type to be used:
 - Android (Samsung, etc)
 - iOS (Apple)
- The apps can be downloaded from:
 - Android: PlayStore
 - iOS: TestFlight
- The user must have a valid D365, for Finance and Operations, license:
 - Environment: Same D365 environment as used for transacting
 - Company: Defaults to the user setup in D365
- The users should be able to successfully login to the app by using the same login details as used for D365 for Finance and Operations. The relevant restrictions and legal entity allocations on D365 for Finance and Operations will be applied on the mobile app sessions. The same user security roles will permit/exclude the user's right to capture events on the app.
- Whenever a new app update is required to be installed on the mobile phone, first ensure:
 - Previous app installations are uninstalled
 - Clear the mobile phone's cache (android)
 - Remove all previous downloads of the application from the phone's download folder
 - Re-install the application and use

3. Demo script

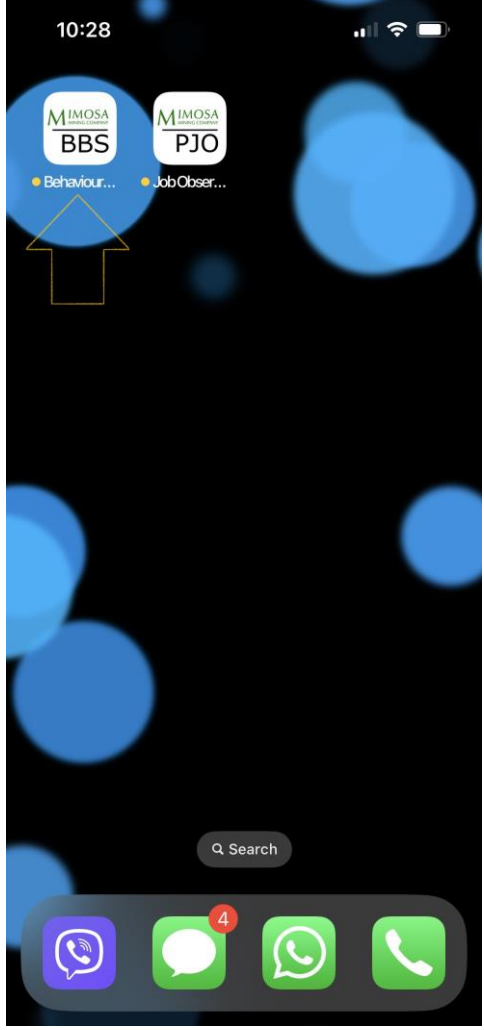
3.1 Demo background





- Organizations who implement a BBS program determine the appropriate list of behaviours to observe, based on the unique behaviours and risks of their organization. Safety professionals usually develop a checklist format that is easy and quick for observers to complete in the field and lists the target behaviours.
- Through this BBS mobile application, the recording of BBS inspections into D365 is easily done from any iOS or Android mobile device. Once inspections have been done, BBS administrators can evaluate and progress these records further within D365. Subsequently users can view changes to BBSs from their mobile devices.

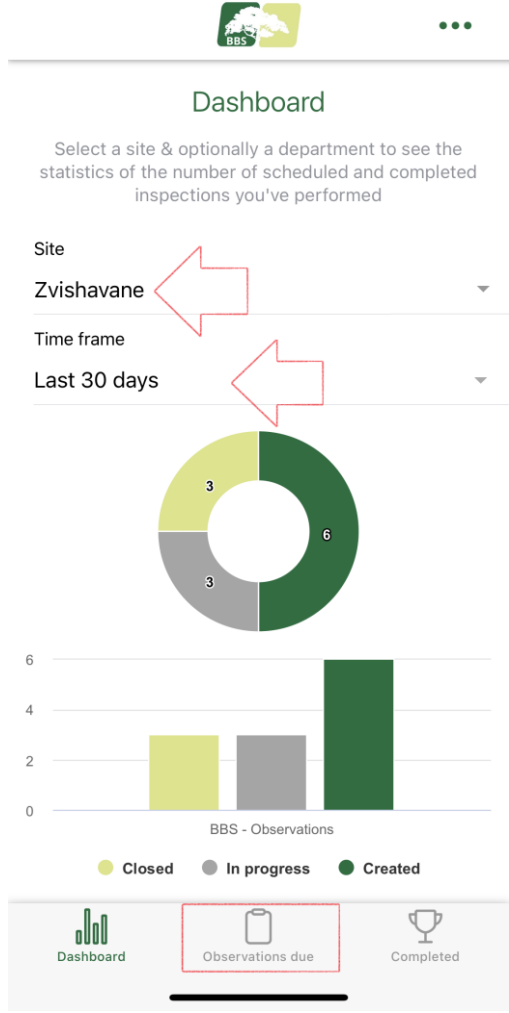
3.2 Demo Scenario

- Inspection:
 - The worker conveniently takes out his/her mobile device and logs into D365.
 - The BBS mobile app enables the user to capture the results/findings while the observation is being done.
 - The worker can also view the detail of the observation done by him/her or any other person.
 - In closing, we will view the observation created using the mobile device, in D365.
- It is assumed that D365 OHS and GRC are installed on D365.

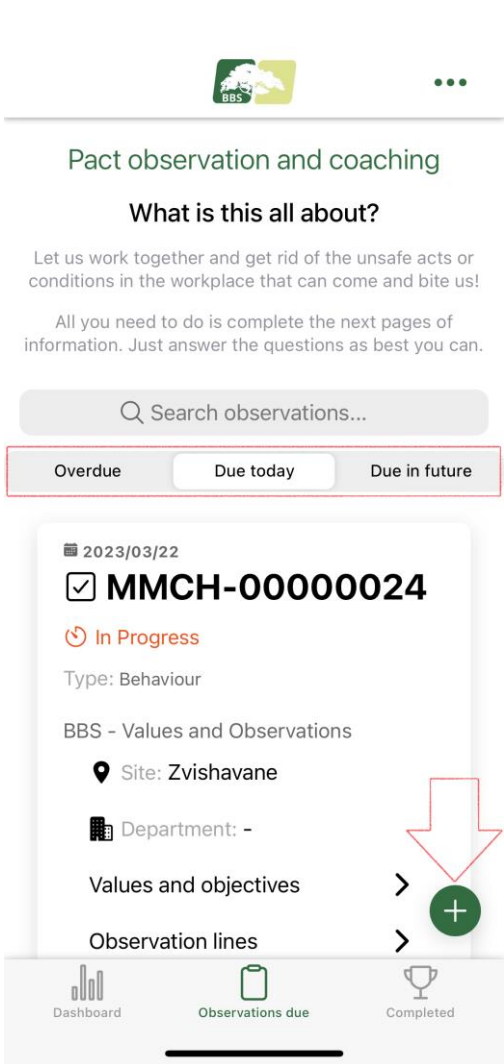
3.2.1 Recording a BBS observation via the D365 BBS mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>Inspector:</p> <p>A user is ready to do a BBS observation on one of the truck drivers.</p> <p>The user takes out his/her mobile phone and taps on the Behaviour Based Safety (BBS) icon.</p>	

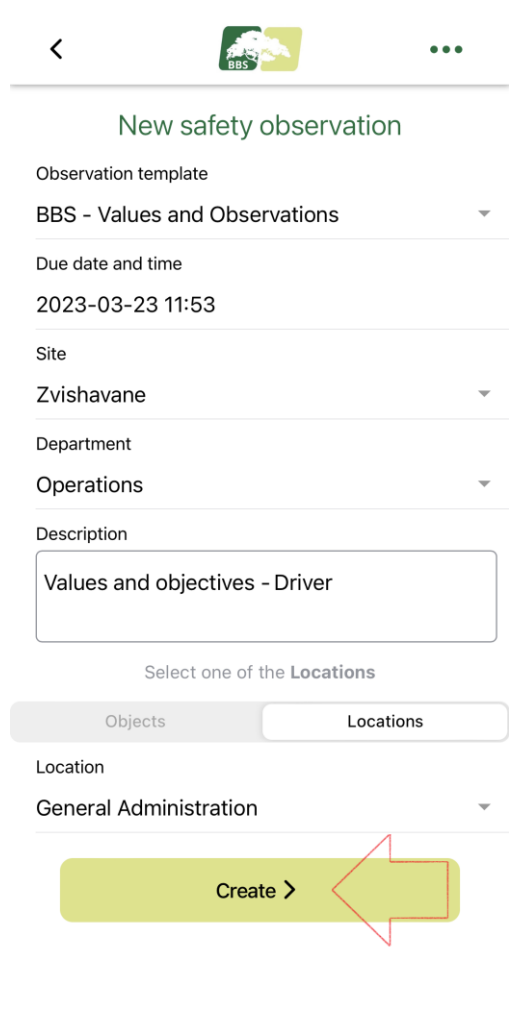
TALKING POINTS AND STEPS	MOBILE APP
<p>The logo on the login screen appears ...</p> <p>The user's D365 login details (Username and Password) are entered and used by the app for validation.</p> <p>The user then taps on the Login button to login to the app session.</p>	 <p>Behaviour Based Observations</p> <p>The convenient way to do behavioural based safety observations while on the move.</p> <div data-bbox="991 808 1453 862">  noelene.cilliers@axnosis.com </div> <div data-bbox="991 869 1453 922">  </div> <div data-bbox="1125 958 1310 1059">  </div> <div data-bbox="1098 1086 1345 1126"> <div>Forgot</div> <div>Login</div> </div>

TALKING POINTS AND STEPS	MOBILE APP
<p>The Dashboard screen opens where the user can see an overview of all the BBS observations that have been captured via the BBS app and D365.</p> <p>The user can filter on the Site, to view specific BBS observations that have been done.</p> <p>There is also a Time frame filter to narrow down the search.</p> <p>The user taps on the Observations due button at the bottom of the screen.</p>	

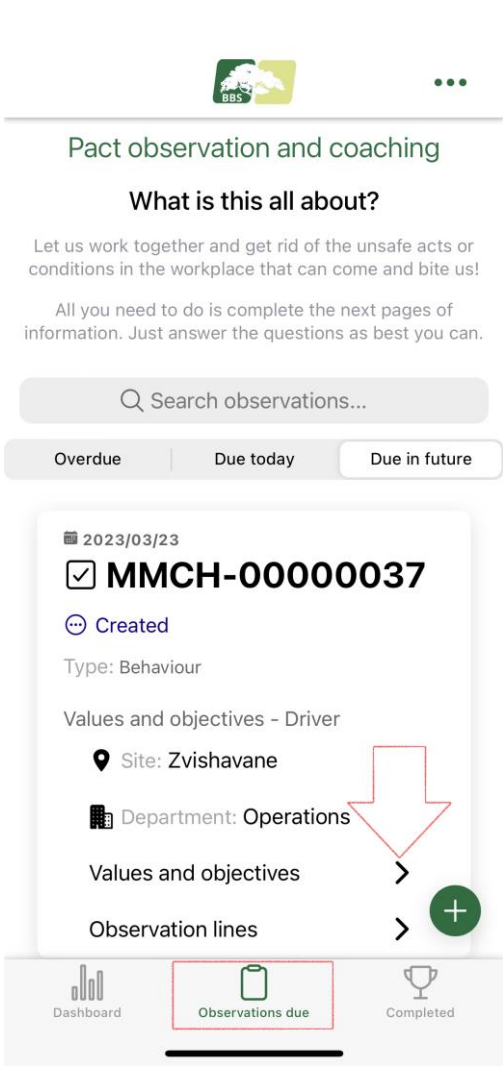
3.2.2 Viewing the BBS inspection details via the D365 Inspections mobile app

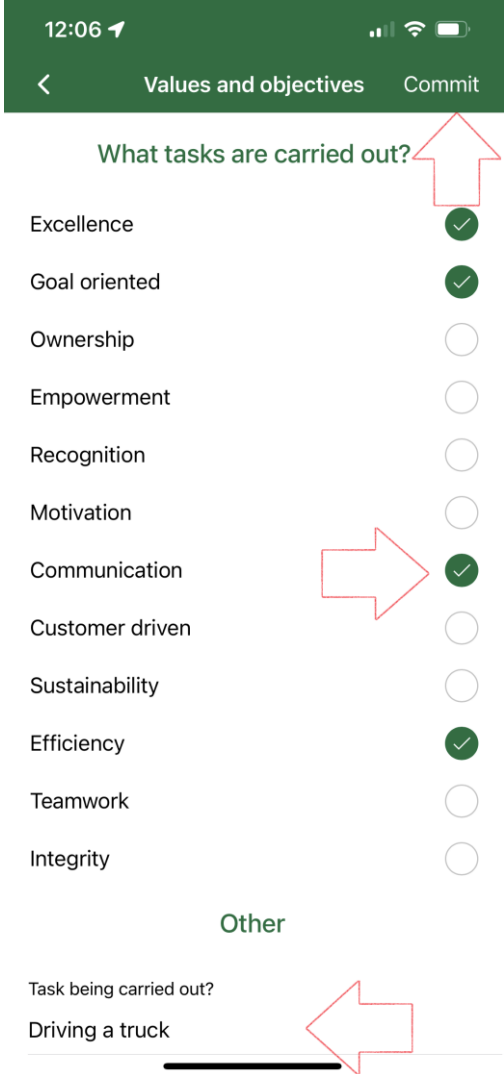
TALKING POINTS AND STEPS	MOBILE APP
<p>The Observations due screen will open. The user can choose to see:</p> <ul style="list-style-type: none"> • All overdue observations • All observations due today • All observations due in the future <p>To create a new BBS inspection, tap on the +plus button.</p>	

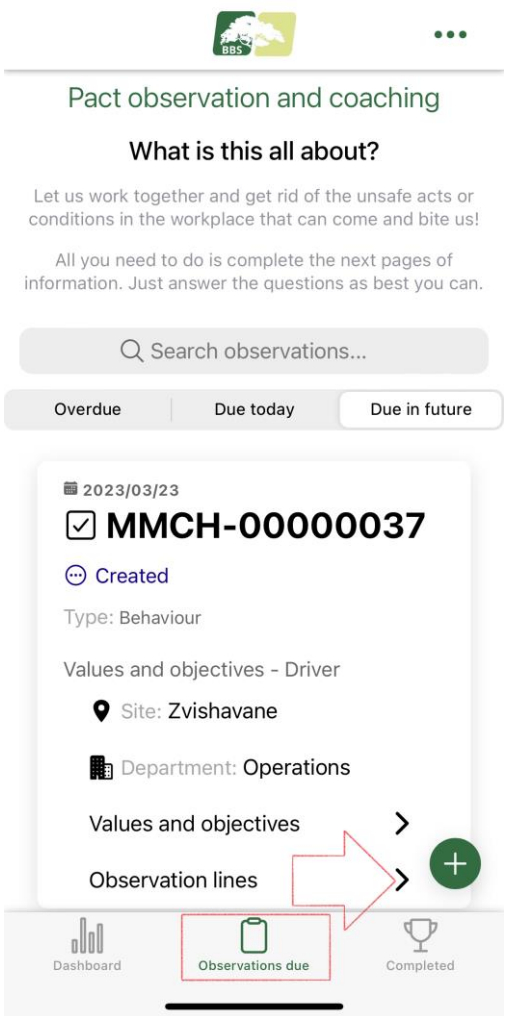
3.2.3 Create a new BBS inspection via the D365 BBS mobile app

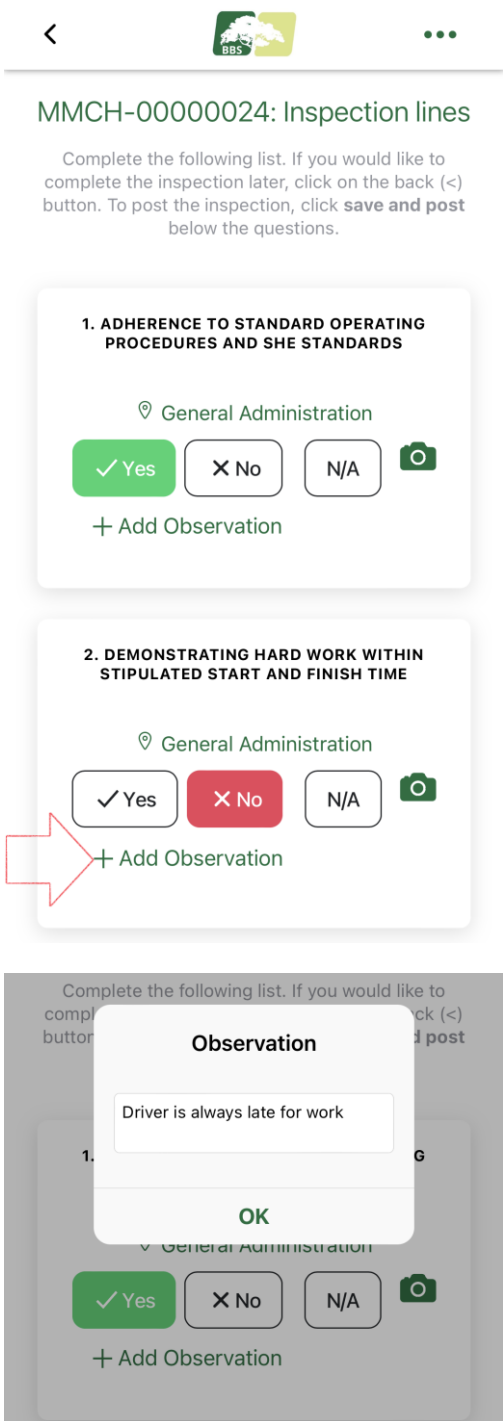
TALKING POINTS AND STEPS	MOBILE APP
<p>The New safety observation screen opens, and the user can enter the following information:</p> <ul style="list-style-type: none"> • Select the relevant Observation template from the dropdown list • Select the Due date and time for the observation • Select the Site where the observation is to be done • Select the relevant Department from the dropdown list • Enter a brief Description • Select the Location where the observation is being done • Tap on the Create button <p>(A red line indicates a mandatory field has not been completed)</p>	

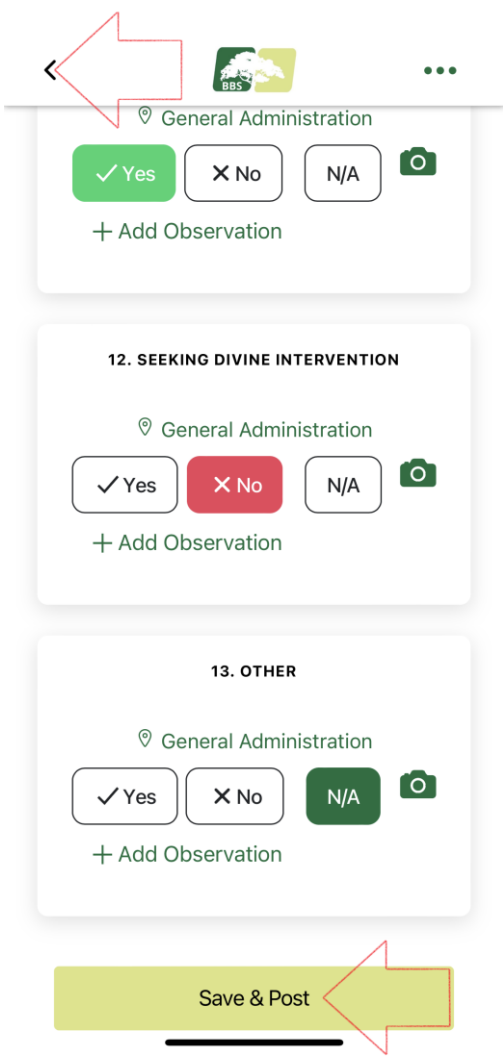
3.2.4 Performing an observation via the D365 BBS mobile app

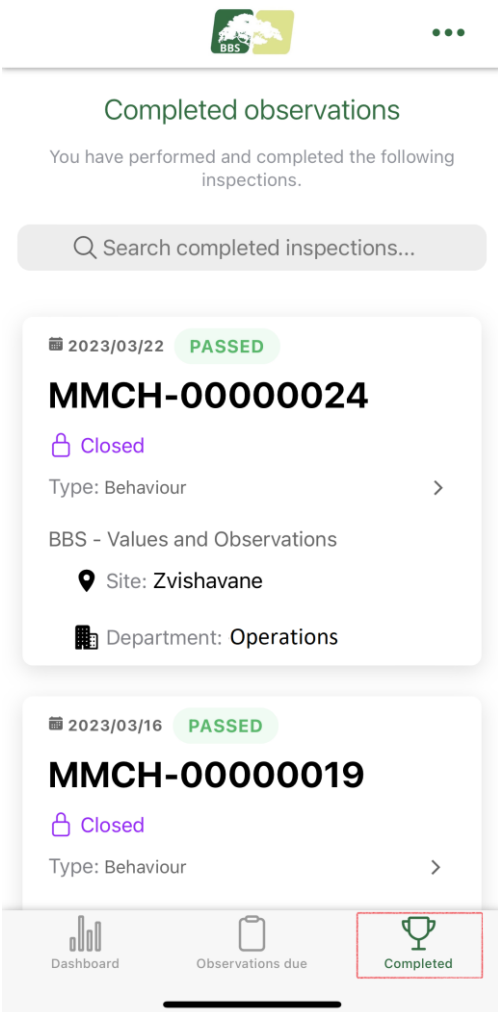
TALKING POINTS AND STEPS	MOBILE APP
<p>To perform an observation:</p> <ul style="list-style-type: none"> On the Observations due screen, scroll to find the relevant observation Tap on the Values and objectives arrow to open the questions 	 <p>The screenshot shows the BBS mobile app interface. At the top, there's a header with the BBS logo and a menu icon. Below the header, the main content area displays 'Pact observation and coaching' with a sub-header 'What is this all about?'. It includes introductory text and a search bar. Below the search bar, there are filters for 'Overdue', 'Due today', and 'Due in future'. The main list shows an observation for '2023/03/23' with ID 'MMCH-00000037'. It is marked as 'Created' and has a type of 'Behaviour'. The 'Values and objectives - Driver' section is expanded, showing 'Site: Zvishavane' and 'Department: Operations'. Below this, there are sections for 'Values and objectives' and 'Observation lines', both with right-pointing arrows. A red arrow points to the 'Values and objectives' arrow. The bottom navigation bar has three icons: 'Dashboard', 'Observations due' (highlighted with a red box), and 'Completed'.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>Answer the questions on the Values and objectives screen.</p> <p>Tap on the Commit button to commit the answers to D365.</p> <p>A notification will pop up confirming that the answers have successfully been committed to D365</p> <p>Click on the back button.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Observation lines arrow to complete questions on the Inspection lines screen.</p>	 <p>Pact observation and coaching</p> <p>What is this all about?</p> <p>Let us work together and get rid of the unsafe acts or conditions in the workplace that can come and bite us!</p> <p>All you need to do is complete the next pages of information. Just answer the questions as best you can.</p> <p>Q Search observations...</p> <p>Overdue Due today Due in future</p> <p>2023/03/23</p> <p><input checked="" type="checkbox"/> MMCH-00000037</p> <p>Created</p> <p>Type: Behaviour</p> <p>Values and objectives - Driver</p> <p>Site: Zvishavane</p> <p>Department: Operations</p> <p>Values and objectives ></p> <p>Observation lines ></p> <p>Dashboard Observations due Completed</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>On the Inspection Lines screen the user can go through each inspection line, indicating whether the person being observed complies (Yes), does not comply (No), or mark not applicable (NA) if the line is not applicable to the specific worker</p> <p>An observation can be added to each of the lines by tapping on the + Add Observation button.</p> <p>(The observation can be edited after it has been entered, but not after the observation has been posted)</p>	 <p>The screenshot shows the 'Inspection Lines' screen in the mobile app. At the top, there is a header with a back arrow, a logo, and a menu icon. Below the header, the title 'MMCH-00000024: Inspection lines' is displayed. A paragraph of instructions follows: 'Complete the following list. If you would like to complete the inspection later, click on the back (<) button. To post the inspection, click save and post below the questions.'</p> <p>There are two main sections for inspection lines:</p> <ul style="list-style-type: none"> 1. ADHERENCE TO STANDARD OPERATING PROCEDURES AND SHE STANDARDS: This section includes a location tag 'General Administration', three buttons for 'Yes' (green), 'No' (white with red X), and 'N/A' (white), and a camera icon. Below these is a '+ Add Observation' button. 2. DEMONSTRATING HARD WORK WITHIN STIPULATED START AND FINISH TIME: This section also includes a location tag 'General Administration', three buttons for 'Yes' (green), 'No' (red), and 'N/A' (white), and a camera icon. Below these is a '+ Add Observation' button. A red arrow points to this button. <p>At the bottom, an 'Observation' dialog box is shown, which is a white box with a text input field containing 'Driver is always late for work' and an 'OK' button.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>If the user wants to continue with the questions at a later stage, he/she can tap on the back arrow in the top left-hand side of the screen to go back to the Observation.</p> <p>Once all the observations have been entered, the user taps on the Save & Post button at the bottom of the screen.</p>	 <p>The screenshot displays the mobile app interface. At the top left, a red arrow points to a back arrow icon. The app shows three observation forms, each with a title, a location pin icon, and three buttons: '✓ Yes', '✗ No', and 'N/A'. The first form is titled 'General Administration'. The second form is titled '12. SEEKING DIVINE INTERVENTION'. The third form is titled '13. OTHER'. Each form also has a '+ Add Observation' button and a camera icon. At the bottom, a green 'Save & Post' button is highlighted with a red arrow pointing to it.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>The completed BBS observation can now be viewed on the Completed observations screen.</p>	 <p>Completed observations</p> <p>You have performed and completed the following inspections.</p> <p>Search completed inspections...</p> <p>2023/03/22 PASSED</p> <p>MMCH-00000024</p> <p>Closed</p> <p>Type: Behaviour</p> <p>BBS - Values and Observations</p> <p>Site: Zvishavane</p> <p>Department: Operations</p> <p>2023/03/16 PASSED</p> <p>MMCH-00000019</p> <p>Closed</p> <p>Type: Behaviour</p> <p>Dashboard Observations due Completed</p>

3.3 Viewing the “mobile created” BBS inspection inside D365

TALKING POINTS AND STEPS	DYNAMICS OHS 365 MODULE																																																																																																																																																																									
<p>Inspector:</p> <p>The mobile created BBS inspection can be viewed inside D365 – log into D365 and navigate to the HSE module.</p> <p>Go to:</p> <p>HSE>Inspections>BBS</p> <p>Inspection journals</p> <p>Click on the Inspection that you want to see the details of.</p>	<div><div><div><div><div><div>Save</div><div>+ New</div><div>Delete</div></div><div>Inspection journal</div><div>Options</div><div></div></div></div><div><div></div><div>BBS inspection journals</div><div>Standard view</div></div><div><div><div>Filter</div></div><div><div>Show</div><div>All</div></div><div><div>My inspections</div><div>No</div></div></div><table><tr><th></th><th>Inspection journal</th><th>Journal name</th><th>Inspector</th><th>Type</th><th>Line count</th><th>Inspection date</th><th>Yes/No</th><th>Site</th><th>Department</th><th>Pass-Fail</th><th>Status</th><th>Due date</th></tr><tr><td></td><td>MMCH-0000020</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>5/10/2023</td><td>✓</td><td>Zvishavane</td><td>Finance</td><td></td><td>In progress</td><td>5/10/2023</td></tr><tr><td></td><td>MMCH-0000021</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>5/3/2023</td><td>✓</td><td>Zvishavane</td><td>Operations</td><td></td><td>Created</td><td>5/3/2023</td></tr><tr><td></td><td>MMCH-0000022</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>4/26/2023</td><td>✓</td><td>Zvishavane</td><td>Legal</td><td></td><td>Created</td><td>4/26/2023</td></tr><tr><td></td><td>MMCH-0000037</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>3/22/2023</td><td>✓</td><td>Zvishavane</td><td>Operations</td><td></td><td>Created</td><td>3/23/2023</td></tr><tr><td></td><td>MMCH-0000036</td><td>BBS</td><td>Morne Kapp</td><td>Behaviour</td><td>13</td><td>3/16/2023</td><td>✓</td><td>Zvishavane</td><td>Legal</td><td></td><td>Created</td><td>3/16/2023</td></tr><tr><td></td><td>MMCH-0000035</td><td>BBS</td><td>Morne Kapp</td><td>Behaviour</td><td>13</td><td>3/16/2023</td><td>✓</td><td>Zvishavane</td><td>Operations</td><td>Pass</td><td>Closed</td><td>3/16/2023</td></tr><tr><td></td><td>MMCH-0000019</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>3/15/2023</td><td>✓</td><td>Zvishavane</td><td>Operations</td><td>Pass</td><td>Closed</td><td>3/16/2023</td></tr><tr><td></td><td>MMCH-0000024</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>3/15/2023</td><td>✓</td><td>Zvishavane</td><td>Operations</td><td></td><td>Closed</td><td>3/22/2023</td></tr><tr><td></td><td>MMCH-0000018</td><td>BBS</td><td>Noelene Cilliers</td><td>Behaviour</td><td>13</td><td>3/15/2023</td><td>✓</td><td>Zvishavane</td><td>Legal</td><td></td><td>In progress</td><td>3/16/2023</td></tr><tr><td></td><td>MMCH-0000023</td><td>BBS</td><td>Morne Kapp</td><td>Behaviour</td><td>13</td><td>3/15/2023</td><td>✓</td><td>Zvishavane</td><td>Finance</td><td></td><td>Created</td><td>3/15/2023</td></tr><tr><td></td><td>MMCH-0000027</td><td>BBS</td><td>Morne Kapp</td><td>Behaviour</td><td>13</td><td>3/15/2023</td><td>✓</td><td>Zvishavane</td><td>Legal</td><td></td><td>Created</td><td>3/15/2023</td></tr><tr><td></td><td>MMCH-0000034</td><td>BBS</td><td>Morne Kapp</td><td>Behaviour</td><td>13</td><td>3/15/2023</td><td>✓</td><td>Zvishavane</td><td>Finance</td><td></td><td>Created</td><td>3/29/2023</td></tr></table></div></div>		Inspection journal	Journal name	Inspector	Type	Line count	Inspection date	Yes/No	Site	Department	Pass-Fail	Status	Due date		MMCH-0000020	BBS	Noelene Cilliers	Behaviour	13	5/10/2023	✓	Zvishavane	Finance		In progress	5/10/2023		MMCH-0000021	BBS	Noelene Cilliers	Behaviour	13	5/3/2023	✓	Zvishavane	Operations		Created	5/3/2023		MMCH-0000022	BBS	Noelene Cilliers	Behaviour	13	4/26/2023	✓	Zvishavane	Legal		Created	4/26/2023		MMCH-0000037	BBS	Noelene Cilliers	Behaviour	13	3/22/2023	✓	Zvishavane	Operations		Created	3/23/2023		MMCH-0000036	BBS	Morne Kapp	Behaviour	13	3/16/2023	✓	Zvishavane	Legal		Created	3/16/2023		MMCH-0000035	BBS	Morne Kapp	Behaviour	13	3/16/2023	✓	Zvishavane	Operations	Pass	Closed	3/16/2023		MMCH-0000019	BBS	Noelene Cilliers	Behaviour	13	3/15/2023	✓	Zvishavane	Operations	Pass	Closed	3/16/2023		MMCH-0000024	BBS	Noelene Cilliers	Behaviour	13	3/15/2023	✓	Zvishavane	Operations		Closed	3/22/2023		MMCH-0000018	BBS	Noelene Cilliers	Behaviour	13	3/15/2023	✓	Zvishavane	Legal		In progress	3/16/2023		MMCH-0000023	BBS	Morne Kapp	Behaviour	13	3/15/2023	✓	Zvishavane	Finance		Created	3/15/2023		MMCH-0000027	BBS	Morne Kapp	Behaviour	13	3/15/2023	✓	Zvishavane	Legal		Created	3/15/2023		MMCH-0000034	BBS	Morne Kapp	Behaviour	13	3/15/2023	✓	Zvishavane	Finance		Created	3/29/2023
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Demo script – Behaviour Based Safety Mobile App draft

Microsoft Dynamics 365 FO

TALKING POINTS AND STEPS

MOBILE APP



Demo script – Behaviour Based Safety Mobile App draft

Microsoft Dynamics 365 FO

The BBS inspection journal detail page will open.

Open the **Lines** view to see the details

Save + New Delete Inspection journal Options

BBS inspection journals | Standard view

MMCH-00000037 : Values and objectives - Driver

In progress 3/23/2023

Lines Header

Inspection journal

Lines

+ Add Remove Up Down Show/hide

		Inspection date	Description	(S)	Hazard	A605	
		3/22/2023	Observable Behaviors				
		3/22/2023	Adherence to standard operating procedures and SHE standards			N/A	
<input checked="" type="checkbox"/>		3/22/2023	Demonstrating hard work within stipulated start and finish time	<input type="checkbox"/>		No	
		3/22/2023	Helping each other (brother's keeper)			Yes	
		3/22/2023	Doing the right thing always with or without the supervisor			Yes	
		3/22/2023	Continuous improvement of systems and adoption of advanced te...			Yes	
		3/22/2023	Utilization of resources efficiently and responsibly			N/A	

Line details

General Activity

IDENTIFICATION

Note

Please indicate Yes (Safe), No (Unsafe) and add comments where applicable. For example: What did you see?

Comments/Observations

Worker is always late.

Description

Demonstrating hard work withi...

Inspection journal

MMCH-00000037

LINE

Line number

3.0000000000

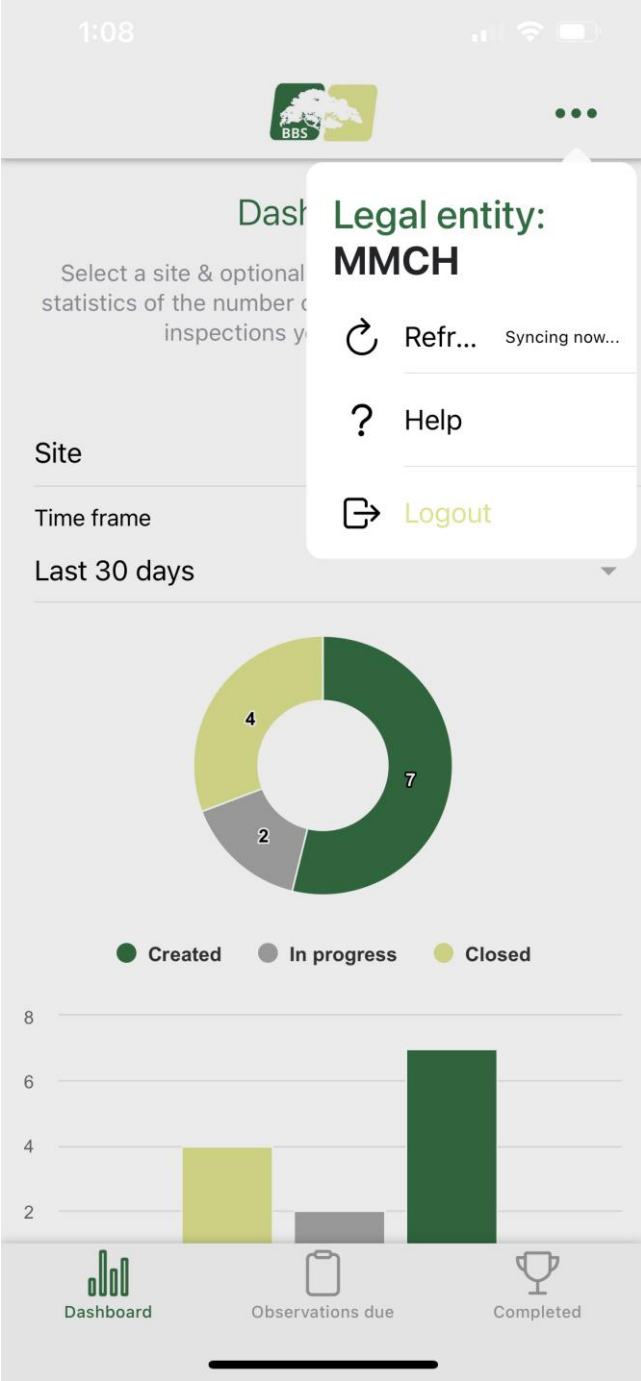
Inspection date

3/22/2023

Inspection sheet name

Yes (Safe), No (Unsafe)

3.4 The ellipsis on the D365 BBS mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>The ellipsis at the top of the screen provides the following functions:</p> <ul style="list-style-type: none"> • Displays the D365 Legal entity that the user is currently logged into • The Refresh data button is used to update the app with recently captured data (via the app and D365) • The Help button opens the Axnosis Contact Support screen • Logout 	 <p>The screenshot shows the mobile app interface. At the top, the status bar displays the time 1:08 and signal icons. Below the BBS logo, the ellipsis menu is open, showing the following options: 'Legal entity: MMCH', 'Refr...' (Refresh) with a 'Syncing now...' status, 'Help', and 'Logout'. The background dashboard includes a 'Site' dropdown, a 'Time frame' dropdown set to 'Last 30 days', a donut chart showing 7 Created (dark green), 2 In progress (grey), and 4 Closed (light green) items, and a bar chart showing counts for 'Created', 'In progress', and 'Closed' categories. The bottom navigation bar has icons for 'Dashboard', 'Observations due', and 'Completed'.</p>