



Axnosis

Demo script – Gate Pass Mobile App

Microsoft Dynamics 365 FO



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Foreword

Entry to a company's sites is restricted and is subject to appropriate entry authorization in the prescribed format of a Gate Pass or any other entry authorization with reference to approval and possible verification as per instruction to a Safety & security policy.

A safety induction is conducted to welcome new workers and visitors to the company and prepare them for their new role. It ensures workers are fully informed about the organization and are aware of their work and responsibilities. It serves as a starting point for an organization to introduce a culture of safety in the workplace.

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

Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
TEST SCRIPT - GATE PASS AND SECURITY – OHS020	17/02/2022	v2.3	KARL FRENZ

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
02/09/2022	2	KRISTIAN JORDAAN	RIAAN VAN DER BERG

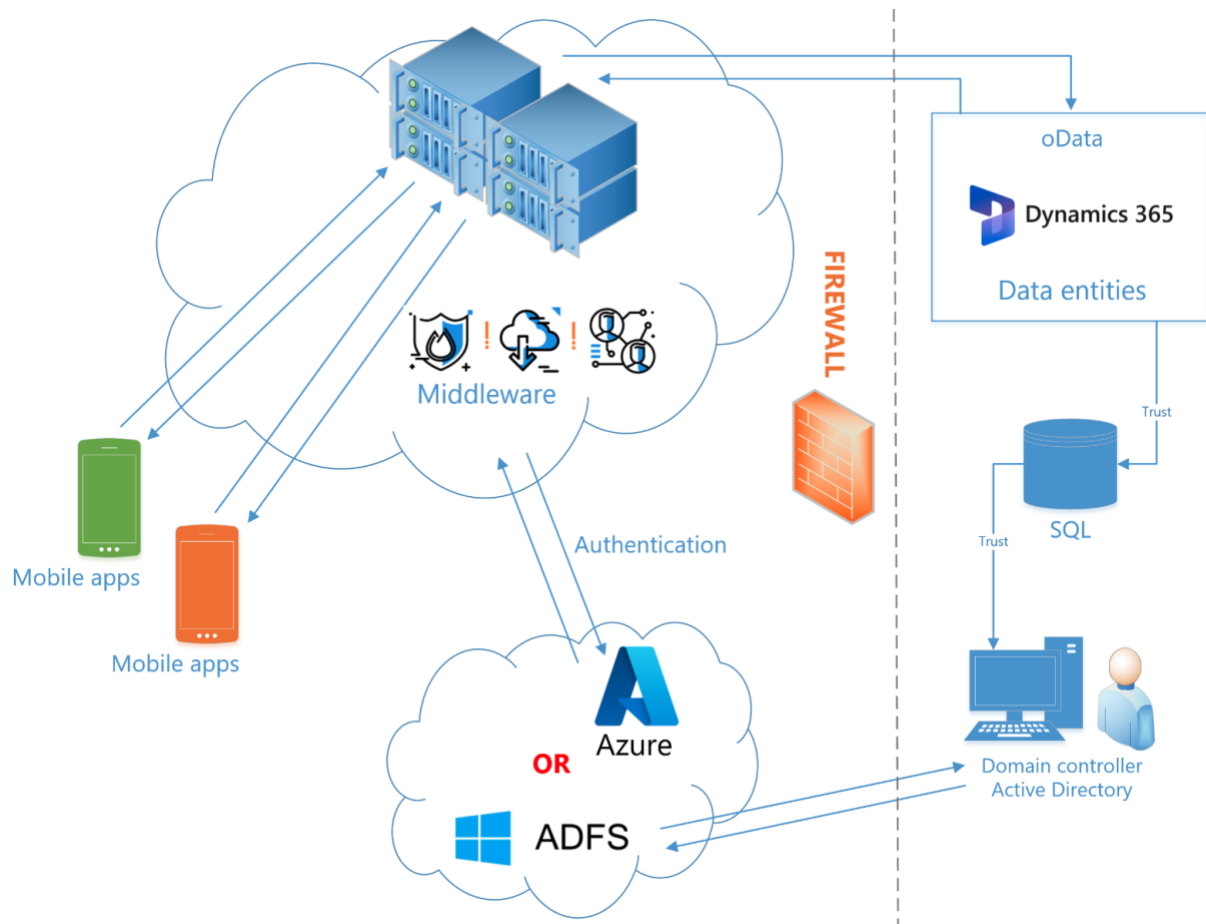
Table 2: Change and Version History

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1. Technology

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



2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Site Pass 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: Play Store
 - 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

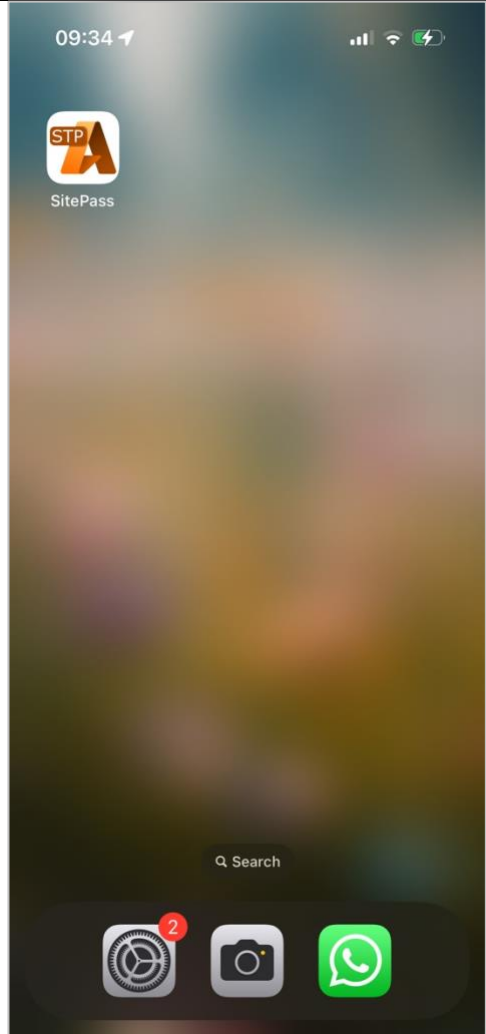
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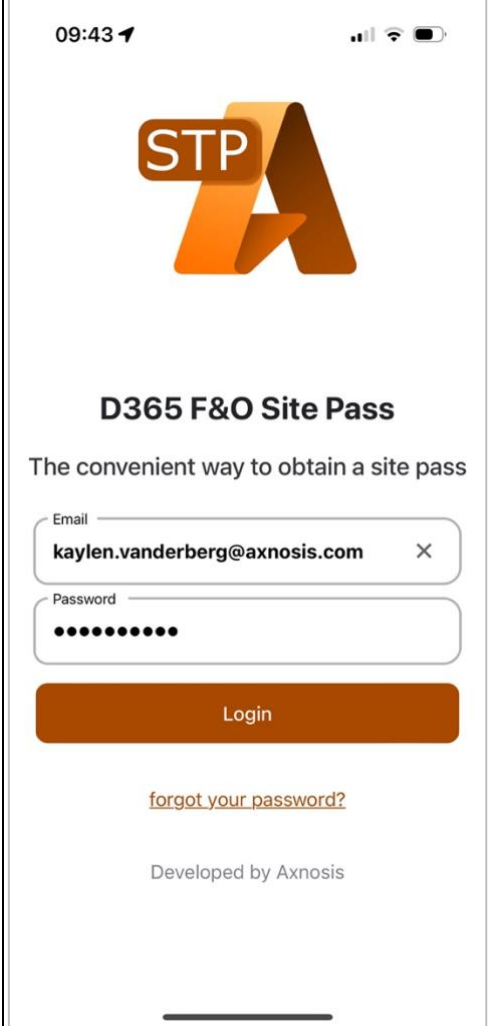
A safety induction is conducted to welcome new workers and visitors to the company and prepare them for their new role. It ensures workers are fully informed about the organization and are aware of their work and responsibilities. It serves as a starting point for an organization to introduce a culture of safety in the workplace.

OHS have these as well as a versatile mobile checklist app that can be used to perform digital inspections and audits. Use the mobile app to confirm safety induction topics were discussed to all employees. Generate on-the-spot reports and assign corrective actions to other safety officials.

- It is assumed that D365 OHS and GRC modules are installed on D365.

3.1.1 Requesting a site pass via the D365 Site Pass mobile app

TALKING POINTS AND STEPS	MOBILE APP
The user takes out his/her mobile phone and taps on the Site Pass (STP) icon.	

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 log into the app session.</p>	

If multi-factor authentication has been enabled for the organization, Microsoft sign in may be required in addition to the application sign in. During the initial sign in, the Microsoft sign in may have to be completed twice.

The Microsoft sign in will not be required during every sign in to the mobile application. Sign in to Microsoft will be required during initial sign in; after sign in expiry and after a user has opted to manually sign out of the Laboratory application.

Enter the **Microsoft email account** and click on the **Next** button to continue.



Sign in

julene.vaneeden@axnosis.com

[Can't access your account?](#)

Next



Sign-in options

[Terms of use](#) [Privacy & cookies](#) ...

Enter the **password** for the Microsoft account entered.

Click on the **Sign in** button to continue.



← julene.vaneeden@axnosis.com

Enter password

.....|

[Forgot my password](#)

Sign in

[Terms of use](#) [Privacy & cookies](#) ...


If multi-factor authentication is enabled, the **authentication number** may be displayed.

Take note of the number for entry in the authenticator app.



julene.vaneeden@axnosis.com

Approve sign in request

 Open your Authenticator app, and enter the number shown to sign in.

88

No numbers in your app? Make sure to upgrade to the latest version.


[I can't use my Microsoft Authenticator app right now](#)

[More information](#)

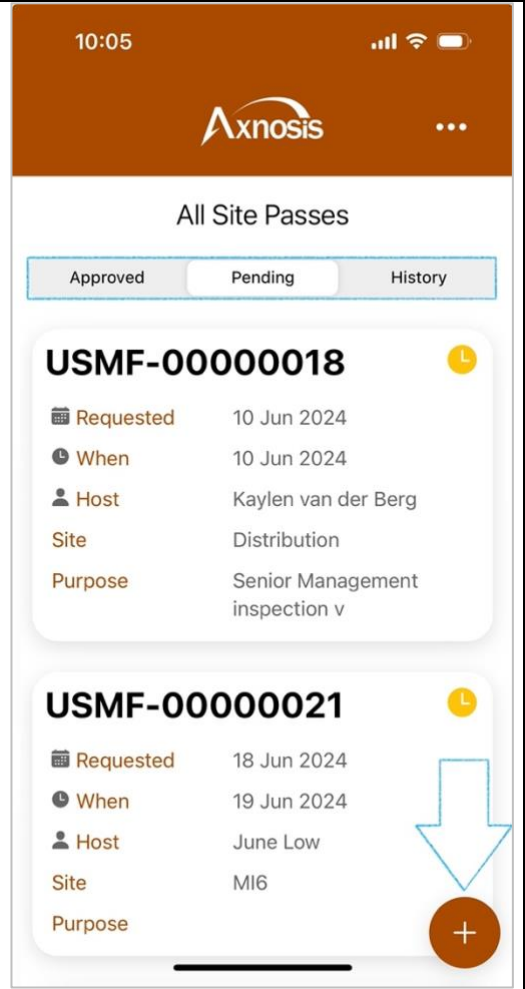
[Terms of use](#) [Privacy & cookies](#) ...

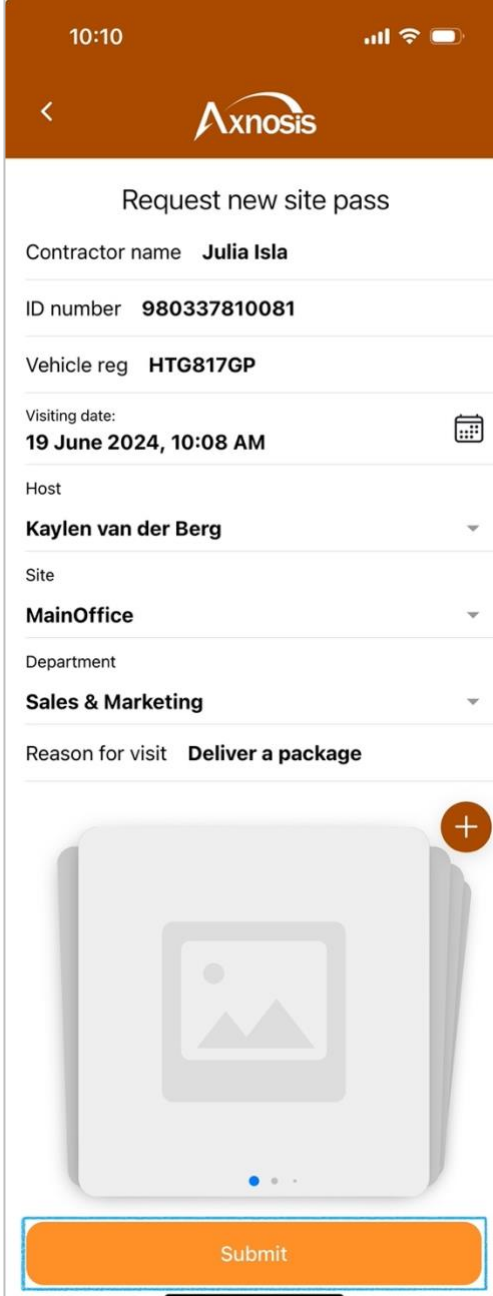
A notification may appear requiring the authentication number to be entered or the user may opt to access the authenticator app manually to complete the authentication process.

Enter the **authentication number** previously provided to approve the sign in then click on the **Yes** button to continue.

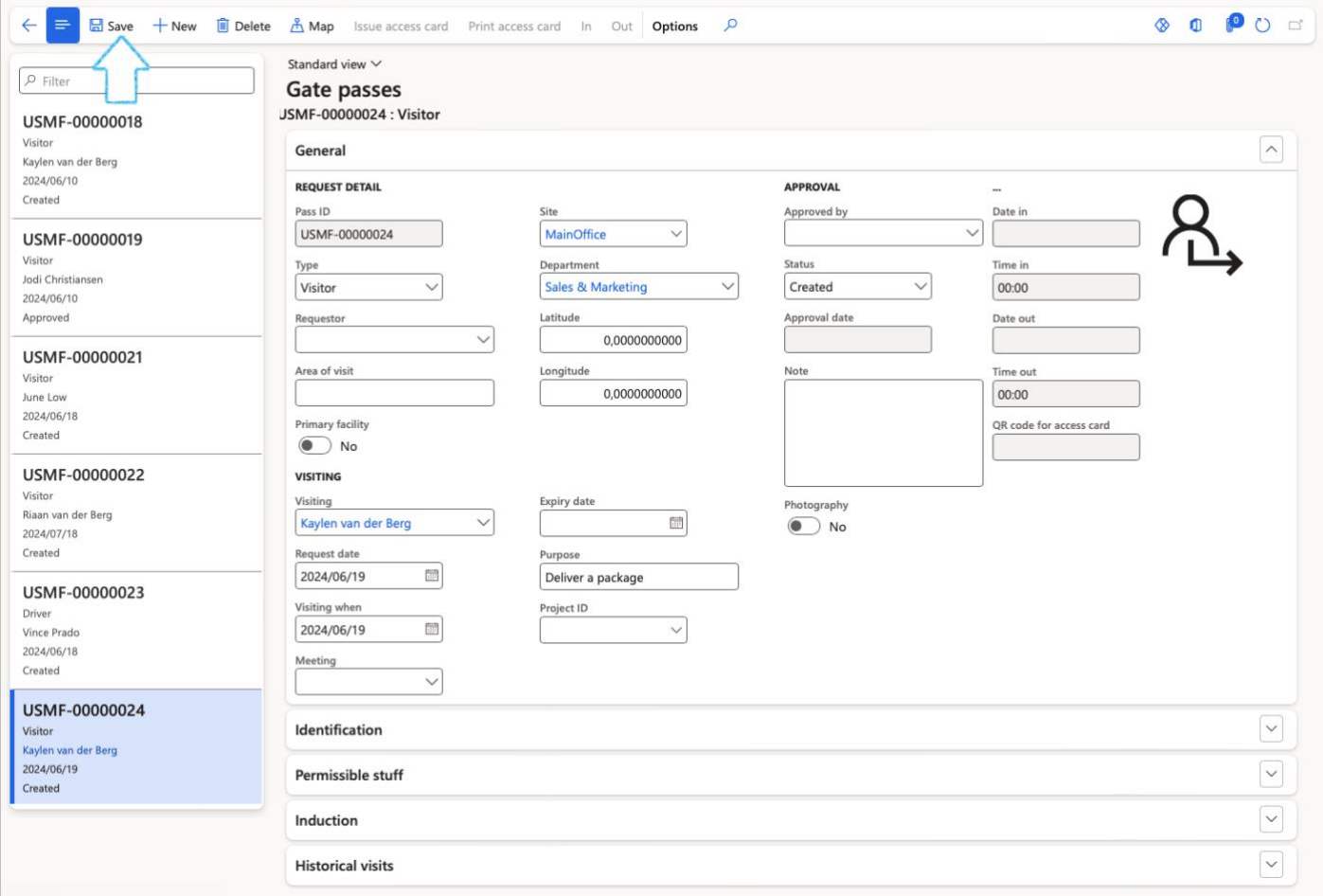


The screenshot shows a Microsoft Dynamics 365 FO sign-in interface. At the top, the Microsoft logo is visible, followed by the email address 'julene.vaneeden@axnosis.com'. Below this, the heading 'Approve sign in request' is displayed. A sub-header reads 'Open your Authenticator app, and enter'. A white dialog box is centered on the screen with the title 'Are you trying to sign in?'. Inside the dialog, it shows 'Axnosis' and the email 'Julene.vaneeden@axnosis.com'. Below this, it says 'Enter the number shown to sign in.' and features a text input field with the placeholder 'Enter number here' and the value '88'. At the bottom of the dialog are three buttons: 'YES', 'NO, IT'S NOT ME', and 'I CAN'T SEE THE NUMBER'. At the very bottom of the screen, there are links for 'Terms of use', 'Privacy & cookies', and a three-dot menu icon.

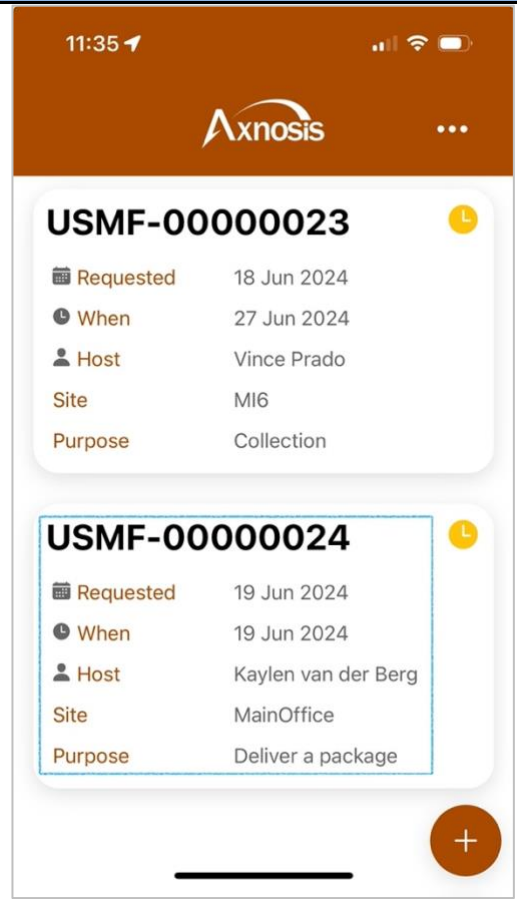
TALKING POINTS AND STEPS	MOBILE APP
<p>The Site Passes screen opens where the user can see the following:</p> <ul style="list-style-type: none"> • Approved tab - all approved gate passes with a future "visiting when" date. • Pending tab - all created gate passes, that have not been approved or rejected. • History tab – all approved or rejected gate passes with a date in the past. <p>These are records that have been created via the STP app and through D365.</p> <p>To request a new site pass:</p> <p>The user taps on the + button at the bottom of the screen.</p>	

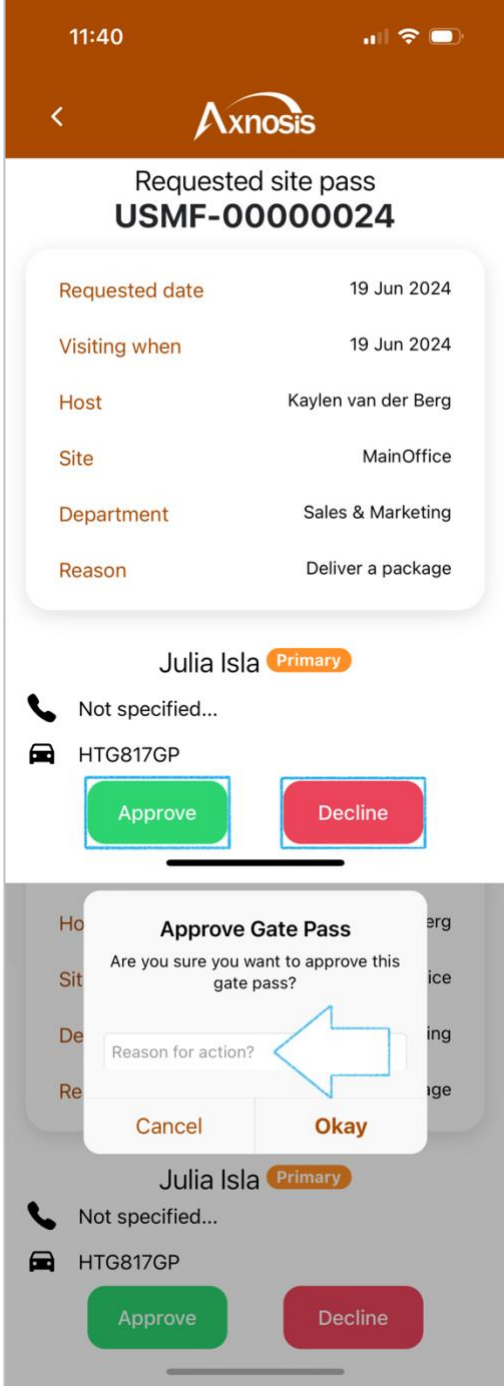
TALKING POINTS AND STEPS	MOBILE APP
<p>The Request new site pass screen opens, and the user can enter the following information:</p> <ul style="list-style-type: none"> Contractor's name Contractor's ID number Vehicle registration number Visiting date Select the name of the Host to be visited Select the Site to be visited Select the Department to be visited Enter a reason for the visit <p>Tap on the Submit button</p>	

3.1.2 Viewing the “mobile created” Site pass request inside D365

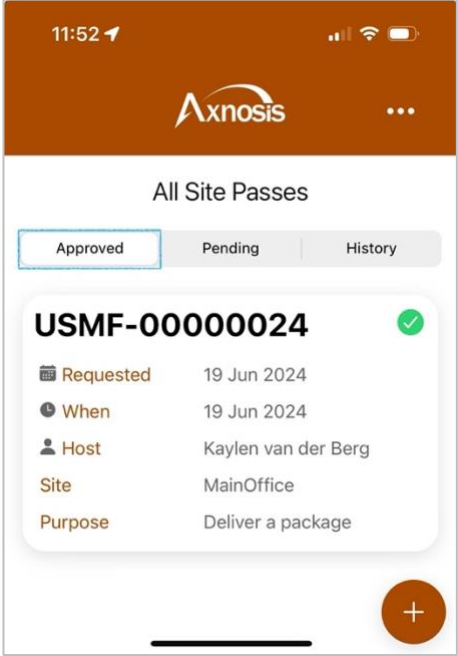
TALKING POINTS AND STEPS	DYNAMICS OHS 365 MODULE
<p>The mobile created site pass request can be viewed inside D365 – log into D365 and navigate to the HSE module.</p> <p>Go to: HSE > Safety and security > Gate passes</p> <p>Select the Site pass that you want to see the details of and once all the details are correctly updated, save the site pass data.</p>	 <p>The screenshot shows the Dynamics OHS 365 interface for viewing a site pass request. The left sidebar lists several requests, with USMF-00000024 selected. The main area displays the details for this request, including visitor information, request details, and approval status. A blue arrow points to the 'Save' button in the top navigation bar.</p> <p>Gate passes USMF-00000024 : Visitor</p> <p>General</p> <p>REQUEST DETAIL</p> <p>Pass ID: USMF-00000024</p> <p>Type: Visitor</p> <p>Requester: [Dropdown]</p> <p>Area of visit: [Text]</p> <p>Primary facility: No</p> <p>VISITING</p> <p>Visiting: Kaylen van der Berg</p> <p>Request date: 2024/06/19</p> <p>Visiting when: 2024/06/19</p> <p>Meeting: [Dropdown]</p> <p>Site: MainOffice</p> <p>Department: Sales & Marketing</p> <p>Latitude: 0,0000000000</p> <p>Longitude: 0,0000000000</p> <p>Expiry date: [Calendar]</p> <p>Purpose: Deliver a package</p> <p>Project ID: [Dropdown]</p> <p>APPROVAL</p> <p>Approved by: [Dropdown]</p> <p>Status: Created</p> <p>Approval date: [Text]</p> <p>Note: [Text]</p> <p>Photography: No</p> <p>Identification</p> <p>Permissible stuff</p> <p>Induction</p> <p>Historical visits</p>

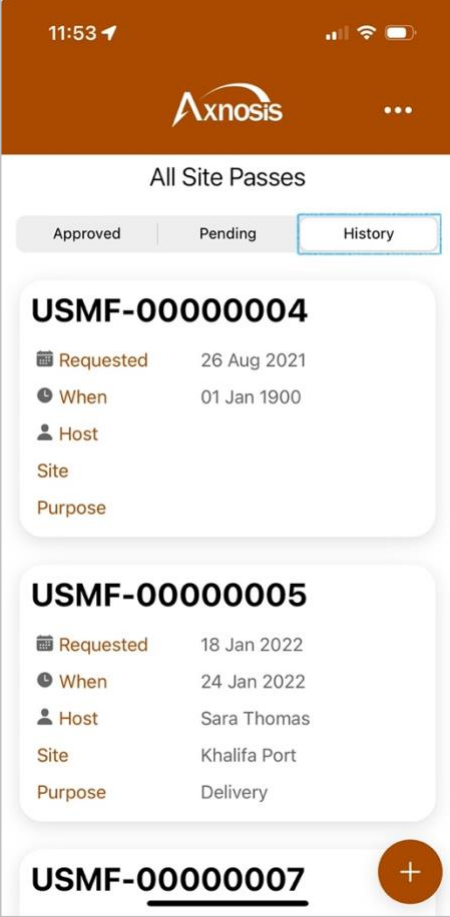
3.1.3 Approve/Decline the Site pass

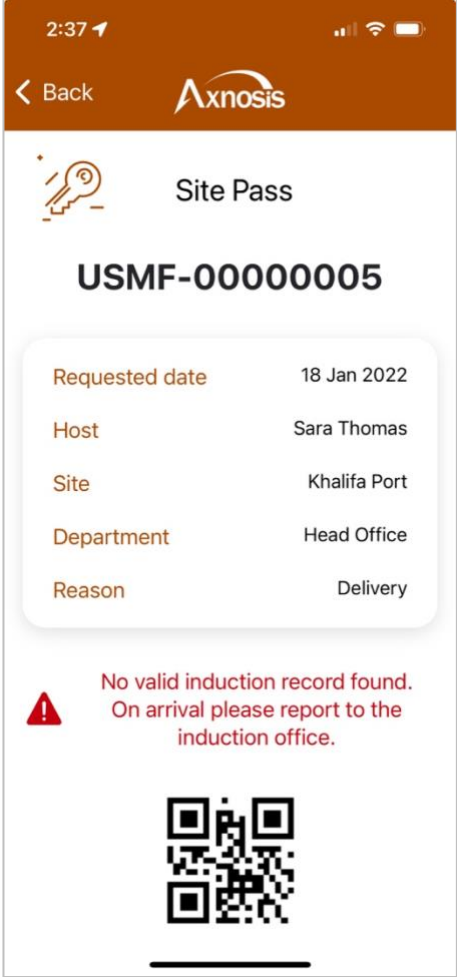
TALKING POINTS AND STEPS	MOBILE APP																								
<p>The new gate pass will now be on the All Site passes screen under the Pending tab.</p> <p>Tap on the relevant gate pass to see the details.</p>	 <p>The screenshot shows the Axnosis mobile app interface. At the top, the status bar displays the time 11:35 and signal strength. The app header is orange with the Axnosis logo and a menu icon. Below the header, there are two cards representing pending site passes. The first card is for USMF-00000023, requested on 18 Jun 2024, for collection at MI6 by Vince Prado. The second card is for USMF-00000024, requested on 19 Jun 2024, for delivering a package at MainOffice by Kaylen van der Berg. The second card is highlighted with a blue border. At the bottom right, there is a red circular button with a white plus sign.</p> <table><tr><td>USMF-00000023</td><td></td></tr><tr><td>Requested</td><td>18 Jun 2024</td></tr><tr><td>When</td><td>27 Jun 2024</td></tr><tr><td>Host</td><td>Vince Prado</td></tr><tr><td>Site</td><td>MI6</td></tr><tr><td>Purpose</td><td>Collection</td></tr></table> <table><tr><td>USMF-00000024</td><td></td></tr><tr><td>Requested</td><td>19 Jun 2024</td></tr><tr><td>When</td><td>19 Jun 2024</td></tr><tr><td>Host</td><td>Kaylen van der Berg</td></tr><tr><td>Site</td><td>MainOffice</td></tr><tr><td>Purpose</td><td>Deliver a package</td></tr></table>	USMF-00000023		Requested	18 Jun 2024	When	27 Jun 2024	Host	Vince Prado	Site	MI6	Purpose	Collection	USMF-00000024		Requested	19 Jun 2024	When	19 Jun 2024	Host	Kaylen van der Berg	Site	MainOffice	Purpose	Deliver a package
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TALKING POINTS AND STEPS	MOBILE APP
<p>To view the details of the site pass you created, tap on the relevant site pass.</p> <p>The following information will be displayed:</p> <ul style="list-style-type: none"> • Requested date • Visiting date • Host • Site • Department • Reason for visit <p>Tap on either Approve or Decline</p> <p>Enter a reason in the box provided</p>	 <p>The mobile app interface displays the following information for a requested site pass:</p> <ul style="list-style-type: none"> Requested site pass: USMF-00000024 Requested date: 19 Jun 2024 Visiting when: 19 Jun 2024 Host: Kaylen van der Berg Site: MainOffice Department: Sales & Marketing Reason: Deliver a package <p>The user is identified as Julia Isla (Primary). Contact information is listed as 'Not specified...' and 'HTG817GP'. The app provides 'Approve' and 'Decline' buttons.</p> <p>A confirmation dialog box titled 'Approve Gate Pass' is shown, asking 'Are you sure you want to approve this gate pass?'. It includes a text input field for 'Reason for action?' and 'Cancel'/'Okay' buttons.</p>

3.1.4 View Approved and Declined Site Passes

TALKING POINTS AND STEPS	MOBILE APP
<p>All approved gate passes can be viewed on the All-Site Passes screen under the Approved tab</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>All declined/rejected gate passes can be viewed on the All-Site Passes screen under the History tab</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>The approved records have a QR code that can be scanned at the gate.</p>	

3.1.5 Viewing the options under the Ellipsis

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"> • 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 	