



Axnosis

Demo script – Incident reporting Mobile App

Microsoft Dynamics 365 FO



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Prepared by:
Kaylen van der Berg

Foreword

In an organization such as a plant, drill rig, or even office block, an incident report or accident report is a form that is filled out in order to record details of an unusual event that occurred at the organization, such as an injury to a staff member or site contractor. The purpose of the incident report is to document the exact details of the occurrence while they are fresh in the minds of those who witnessed the event. This information may be useful in the future when dealing with liability issues stemming from the incident and when an investigation is launched.

Generally, according to OHSAS guidelines, the report must be filled out as soon as possible following the incident (but after the situation has been stabilized). This way, the details written in the report are as accurate as possible.

Most incident reports that are written involve accidents with people. But most facilities will also document an incident in which a contractor or visitor is injured.

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

Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
TEST SCRIPTS - INCIDENTS REPORTING – OHS002	16/08/2022	2.13	PIETO SMITH

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
24/10/2022	2	KRISTIAN JORDAAN	RIAAN VAN DER BERG
07/03/2025	3	KAYLEN VAN DER BERG	RIAAN VAN DER BERG

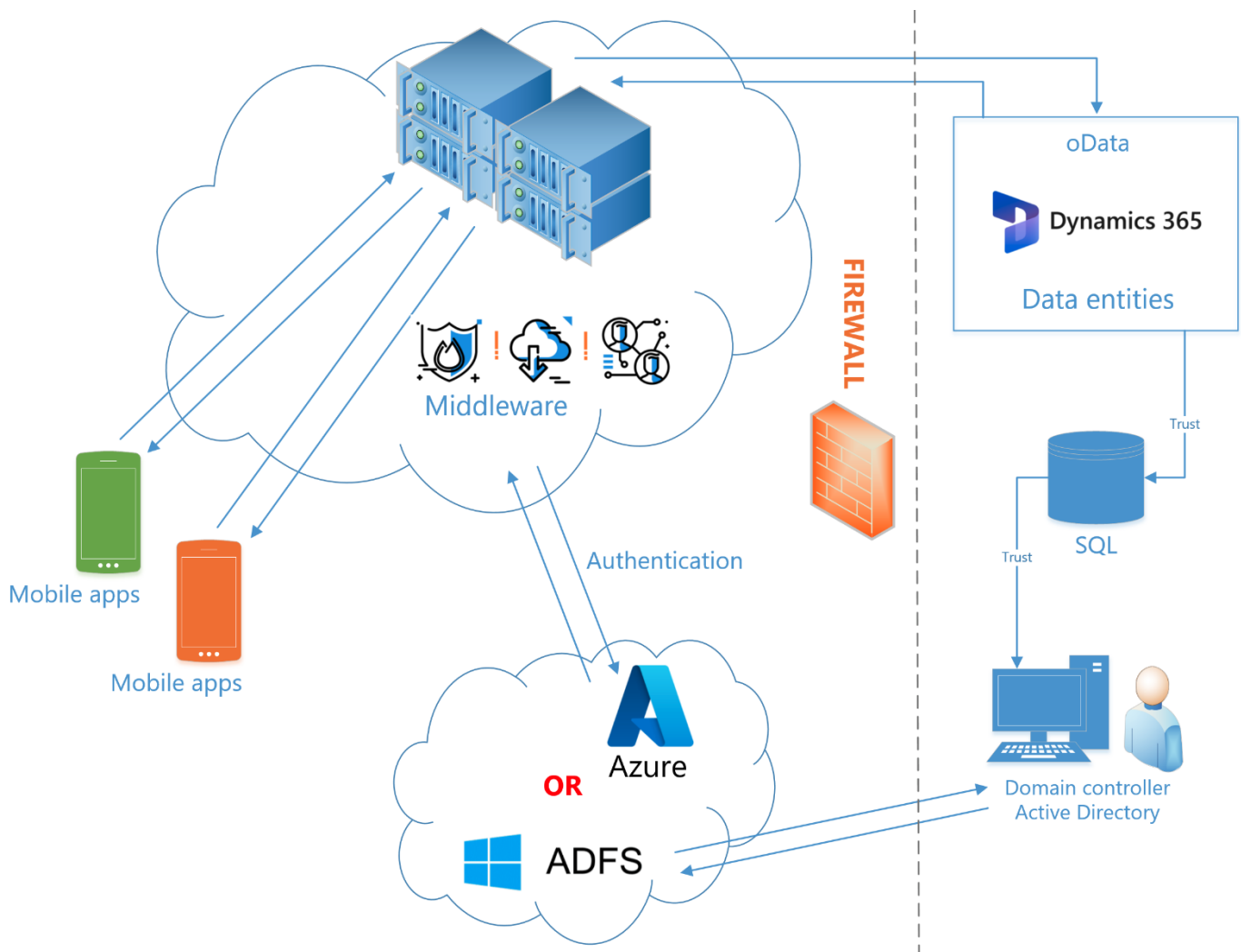
Table 2: Change and Version History

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1. Technology

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



2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Incident reporting 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

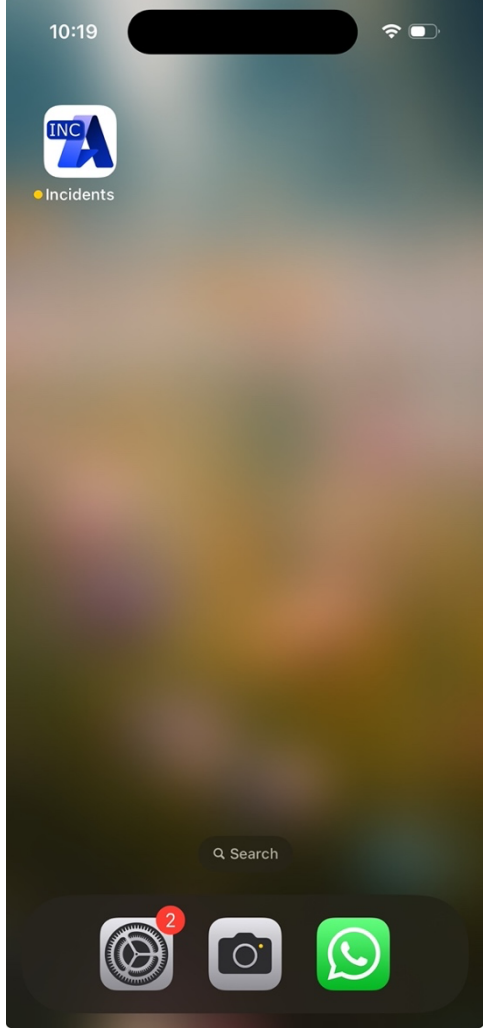
3.1 Demo background

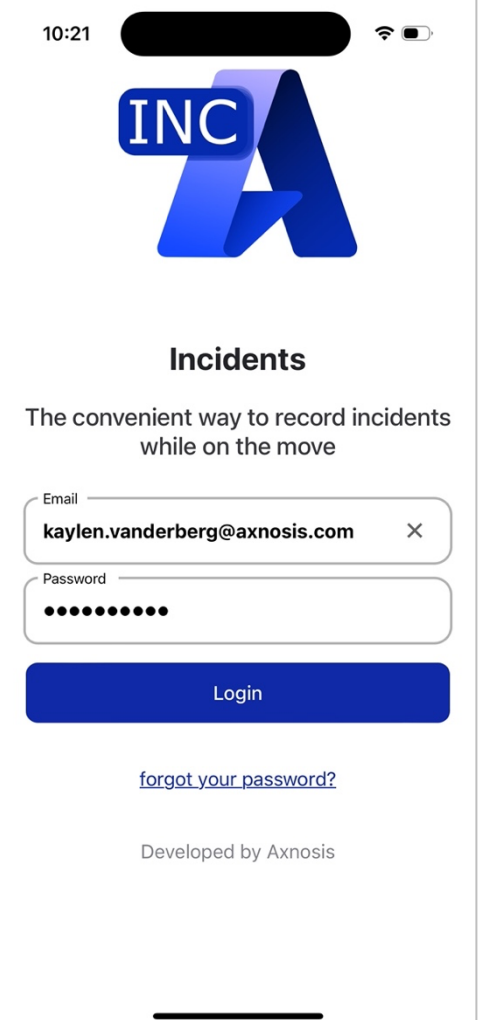
- The identification and recording of incidents is important in any business. Equally, logging and classification of incidents is imperative.
- Through this Incident reporting mobile application, the recording of incidents into D365 is easily done from any iOS or Android mobile device. Once incidents have been logged, incident administrators can evaluate and progress these records further within D365. Subsequently users can view changes to incidents from their mobile devices.

3.2 Demo Scenario

- Incident:
 - The immediate action would be for the worker to log this incident into D365 using a mobile device.
 - The worker would also want to view the detail of the incident logged by him/her or any other person.
 - In closing, we will view the incident created using the mobile device in D365.
- It is assumed that D365 OHS and GRC are installed on D365.

3.2.1 Reporting an incident via the D365 Incidents mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>Incident/event reporter:</p> <p>As a user is walking through a warehouse, he/she sees a co-worker being attacked by a threatened animal, that got trapped in the Finance Department's workspace.</p> <p>The user takes his/her mobile phone out and taps on the Incidents (INC) icon.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>The logo on the login screen appears.</p> <p>The user's D365 login details (User Name 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>	

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.

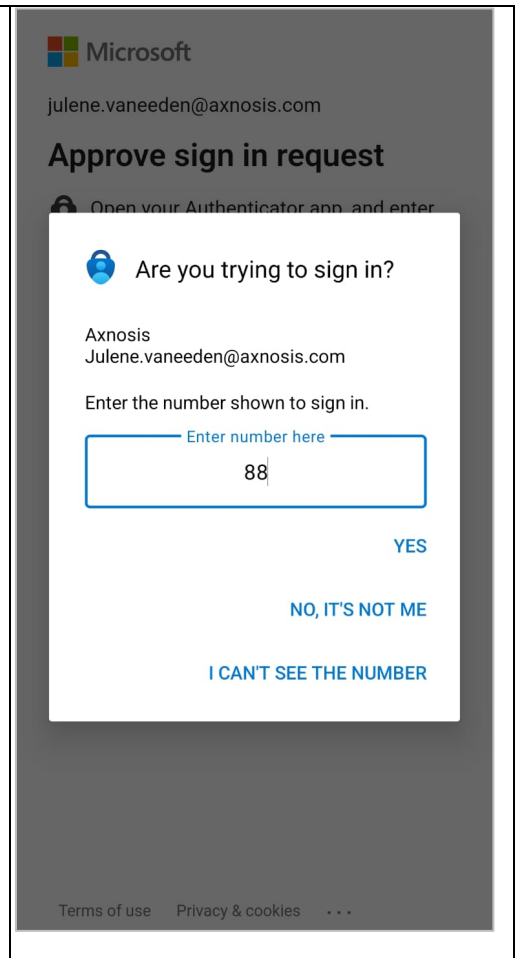
[I can't use my Microsoft Authenticator app right now](#)

[More information](#)

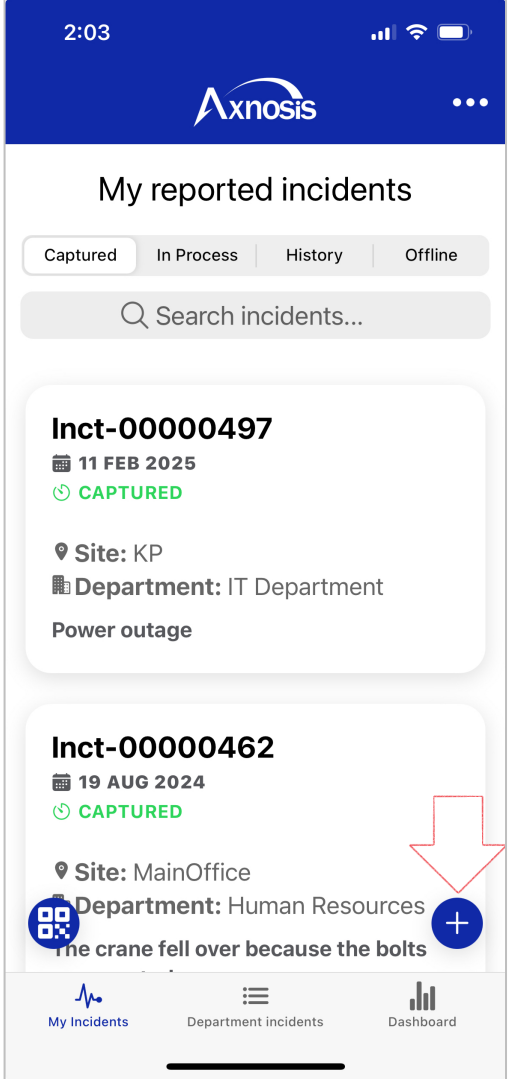
[Terms of use](#) [Privacy & cookies](#) ...

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 mobile app interface for Microsoft Dynamics 365 FO. 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 modal box is centered on the screen with the title 'Are you trying to sign in?'. Inside the modal, the text 'Axnosis Julene.vaneeden@axnosis.com' is shown, followed by the instruction 'Enter the number shown to sign in.'. Below this is a text input field with the placeholder 'Enter number here' and the value '88'. At the bottom of the modal are three buttons: 'YES', 'NO, IT'S NOT ME', and 'I CAN'T SEE THE NUMBER'. At the very bottom of the app screen, there are links for 'Terms of use', 'Privacy & cookies', and a three-dot menu icon.

TALKING POINTS AND STEPS	MOBILE APP
<p>To report an incident, on the My reported incidents screen, tap on the plus (+) button.</p>	



TALKING POINTS AND STEPS

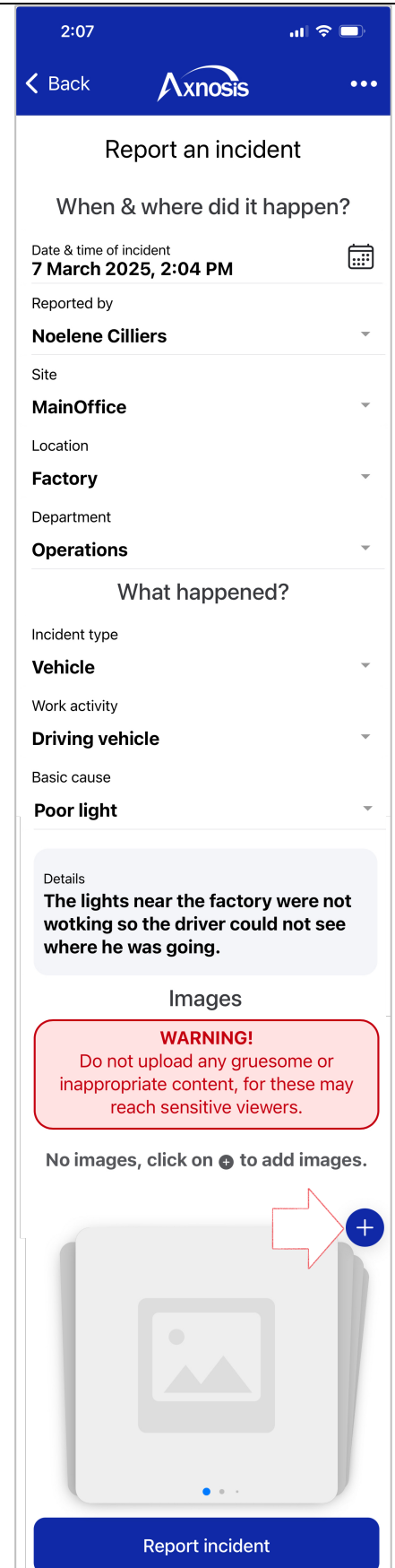
MOBILE APP

The **Report an incident** screen opens, and the user can enter the following information:

- **Date of incident** (today's date is the default)
- **Reported by person** (logged in user will be selected by default)
- **Site**
- **Location**
- **Department**
- **Incident type**
- **Work activity**
- **Basic cause**
- **Details**
- **Images**
 - Can be added from the photo library
 - Can be added by taking a picture

After entering as much detail as possible, the user taps the **Report incident** button.

(A red line indicates a field that is mandatory for the risk assessment to be completed)



2:07

< Back Axnosis

Report an incident

When & where did it happen?

Date & time of incident
7 March 2025, 2:04 PM

Reported by
Noelene Cilliers

Site
MainOffice

Location
Factory

Department
Operations

What happened?

Incident type
Vehicle

Work activity
Driving vehicle

Basic cause
Poor light

Details
The lights near the factory were not working so the driver could not see where he was going.

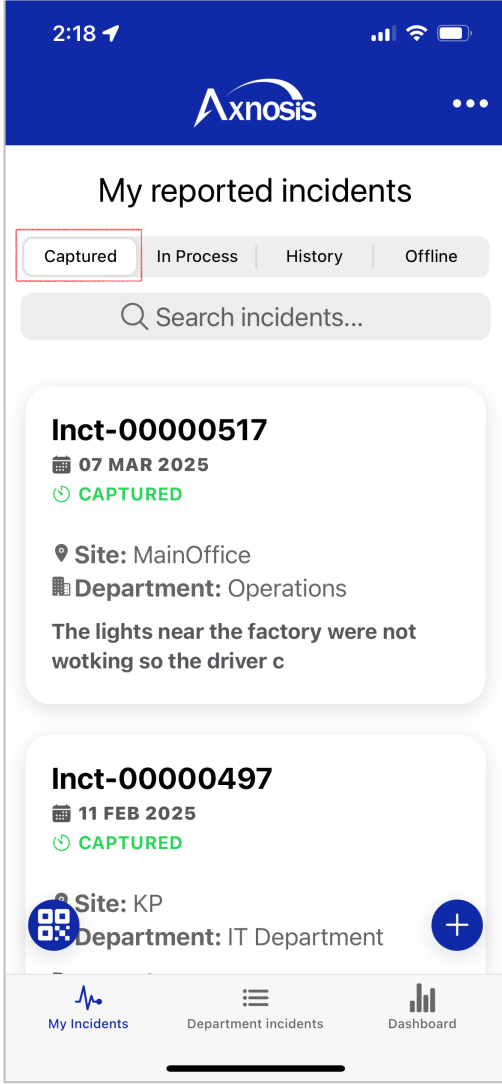
Images

WARNING!
Do not upload any gruesome or inappropriate content, for these may reach sensitive viewers.

No images, click on + to add images.

Report incident

3.2.2 Viewing the incident details on the mobile device

TALKING POINTS AND STEPS	MOBILE APP
<p>The My reported incidents screen opens where the user can see an overview of all the incident that have been captured by him/her via the Incident app as well as through D365.</p>	

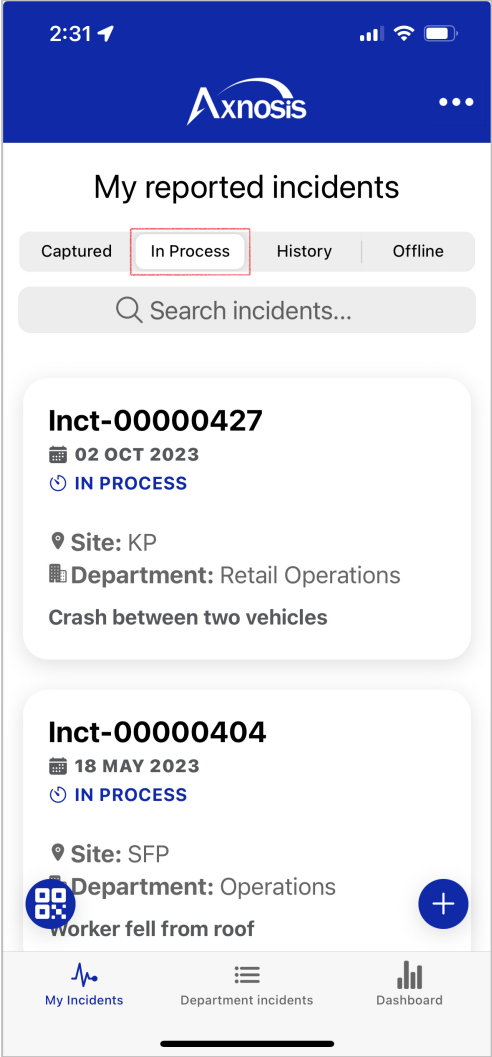
3.2.3 Viewing the “mobile reported” incident inside D365

TALKING POINTS AND STEPS	DYNAMICS OHS 365 MODULE																																																																																																												
<p>Incident reporter:</p> <p>The mobile reported incident can be viewed inside D365 – log into D365 and navigate to the OHS module</p> <p>Go to: OHS > Incidents > All reported incidents</p> <p>The reported incident can then be viewed and edited by clicking on the specific Incident ID.</p>	<div><div><div><div><div><div></div></div><div><div>+ New</div><div>Delete</div></div><div><div>Incident</div><div>Options</div></div><div><div></div></div></div><div><div></div><div></div><div></div><div></div><div></div></div><div><div></div></div></div><div><div>All reported incidents</div><div>Standard view</div><div>Filter</div><table><tr><th><div></div></th><th>Incident ID</th><th>Date recorded</th><th>Site</th><th>Department</th><th>Description</th><th>Incident type</th><th>Status</th><th>From mobile</th><th>Severity Id</th><th>Basic cause</th><th>Recorded by</th></tr><tr><td><div></div></td><td>Inct-00000517</td><td>3/7/2025</td><td>MainOffice</td><td>Operations</td><td>The lights near the factory w...</td><td>Vehicle</td><td>Captured</td><td>Y</td><td></td><td>Poor light</td><td>Noelene Cilliers</td></tr><tr><td><div></div></td><td>AXT-00000159</td><td>3/6/2025</td><td>MainOffice</td><td>Processing</td><td>main off</td><td>Environmental</td><td>Captured</td><td>Y</td><td></td><td>fatigue</td><td>Hannes Strydom</td></tr><tr><td><div></div></td><td>AXT-00000158</td><td>3/6/2025</td><td>MainOffice</td><td>Processing</td><td>test fetique</td><td>Near miss</td><td>Captured</td><td>Y</td><td></td><td>fatigue</td><td>Hannes Strydom</td></tr><tr><td><div></div></td><td>AXT-00000157</td><td>2/25/2025</td><td>MainOffice</td><td>Processing</td><td>tired while working in area</td><td>Environmental</td><td>Captured</td><td>Y</td><td></td><td>fatigue</td><td>Hannes Strydom</td></tr><tr><td><div></div></td><td>AXT-00000156</td><td>2/25/2025</td><td>MainOffice</td><td>Processing</td><td>offline1</td><td>Environmental</td><td>Captured</td><td>Y</td><td>Major</td><td>Fires</td><td>Hannes Strydom</td></tr><tr><td><div></div></td><td>AXT-00000155</td><td>2/25/2025</td><td>MainOffice</td><td>IT Department</td><td>tired</td><td>Environmental</td><td>Captured</td><td>Y</td><td></td><td>fatigue</td><td>Hannes Strydom</td></tr><tr><td><div></div></td><td>AXT-00000154</td><td>2/25/2025</td><td>MainOffice</td><td>Legal</td><td>description info</td><td>Exposure</td><td>Captured</td><td>Y</td><td></td><td>Fires</td><td>Hannes Strydom</td></tr><tr><td><div></div></td><td>AXT-00000153</td><td>2/25/2025</td><td>MainOffice</td><td>IT Department</td><td>human error - descr</td><td>Technological</td><td>Captured</td><td>Y</td><td></td><td>Human</td><td>Hannes Strydom</td></tr></table></div></div></div>	<div></div>	Incident ID	Date recorded	Site	Department	Description	Incident type	Status	From mobile	Severity Id	Basic cause	Recorded by	<div></div>	Inct-00000517	3/7/2025	MainOffice	Operations	The lights near the factory w...	Vehicle	Captured	Y		Poor light	Noelene Cilliers	<div></div>	AXT-00000159	3/6/2025	MainOffice	Processing	main off	Environmental	Captured	Y		fatigue	Hannes Strydom	<div></div>	AXT-00000158	3/6/2025	MainOffice	Processing	test fetique	Near miss	Captured	Y		fatigue	Hannes Strydom	<div></div>	AXT-00000157	2/25/2025	MainOffice	Processing	tired while working in area	Environmental	Captured	Y		fatigue	Hannes Strydom	<div></div>	AXT-00000156	2/25/2025	MainOffice	Processing	offline1	Environmental	Captured	Y	Major	Fires	Hannes Strydom	<div></div>	AXT-00000155	2/25/2025	MainOffice	IT Department	tired	Environmental	Captured	Y		fatigue	Hannes Strydom	<div></div>	AXT-00000154	2/25/2025	MainOffice	Legal	description info	Exposure	Captured	Y		Fires	Hannes Strydom	<div></div>	AXT-00000153	2/25/2025	MainOffice	IT Department	human error - descr	Technological	Captured	Y		Human	Hannes Strydom
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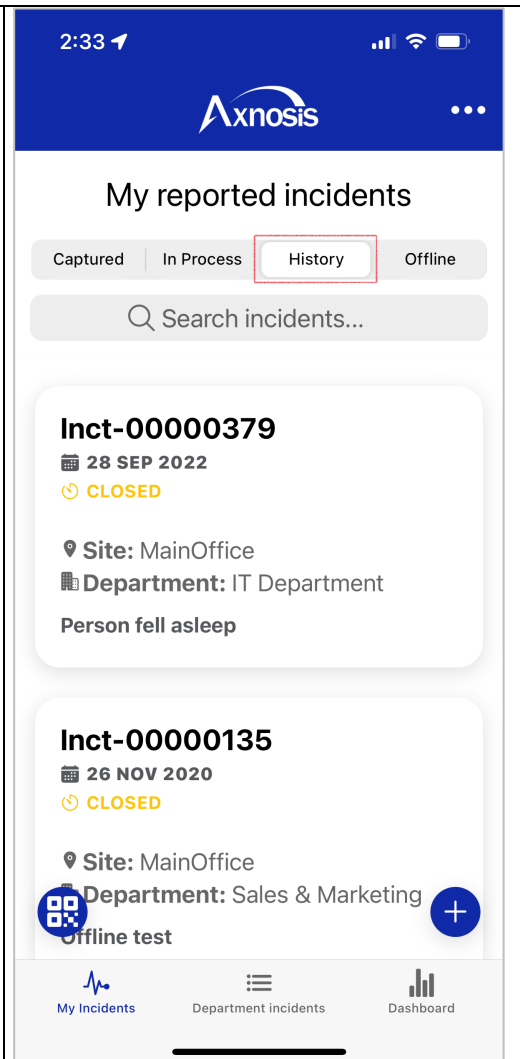
TALKING POINTS AND STEPS

On the **My reported incidents** screen, all reported incidents that are being investigated, can be viewed under the **In Process** tab.

MOBILE APP

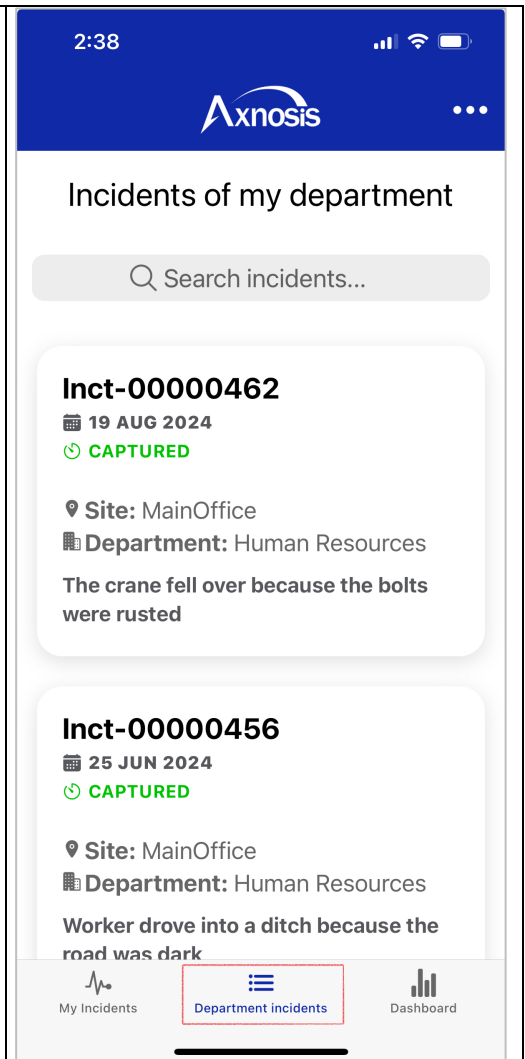


On the **My reported incidents** screen, all completed and expired incidents can be viewed under the **History** tab.



On the **Incidents of my department** screen, the user can view all incidents that have been reported for his/her department.

This allows department managers to view related incidents.



TALKING POINTS AND STEPS

In D365, on the Incident detail form, the name of the manager of the selected department, will be populated in the **Head of department: 2nd level supervisor** field. This person will see the incidents of his/her department on the above-mentioned screen.

DYNAMICS OHS 365 MODULE

Save

New

Delete

Incident

Options

All reported incidents in legal entity

Incct-00000517 : The lights near the factory were not work...

Standard view

Captured

3/7/2025 02:16:42 PM

General

IDENTIFICATION

Incident ID
Incct-00000517

Description
The lights near the f...

Date and time of incident
3/7/2025 02:16 PM

Incident type
Vehicle

Date recorded
3/7/2025

Reported by
Noelene Cilliers

INCIDENT CLASSIFICATION

Reference number

Incident classification
Accident

Status
Captured

Closed date

Closed by

Severity Id
Moderate

Work activity
04

MAIN AREA

Site
MainOffice

Department
Operations

Location
Factory

LINE MANAGEMENT

Supervisor: 1st level supervisor

Head of department: 2nd level supervi...
Noelene Cilliers

Operations manager: 3rd level supervi...

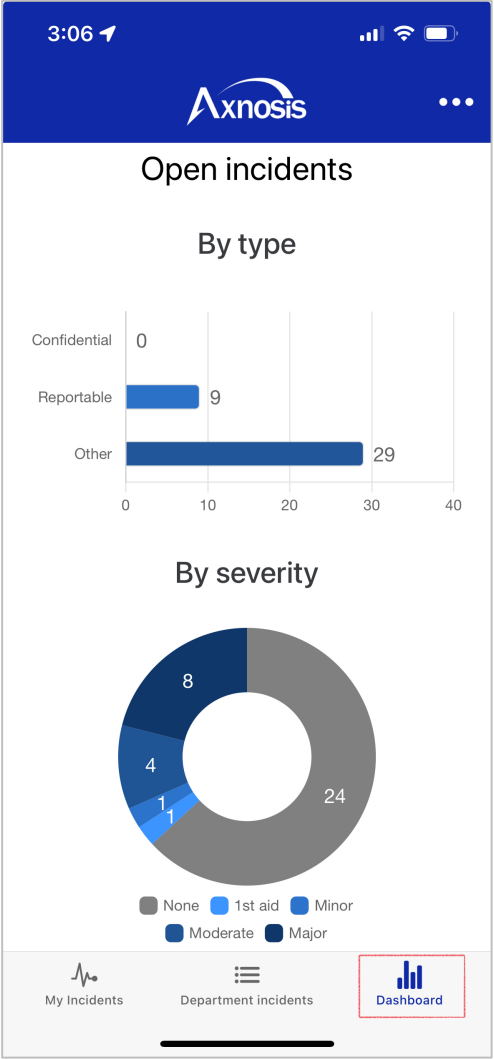
COO: 4th level supervisor

TALKING POINTS AND STEPS

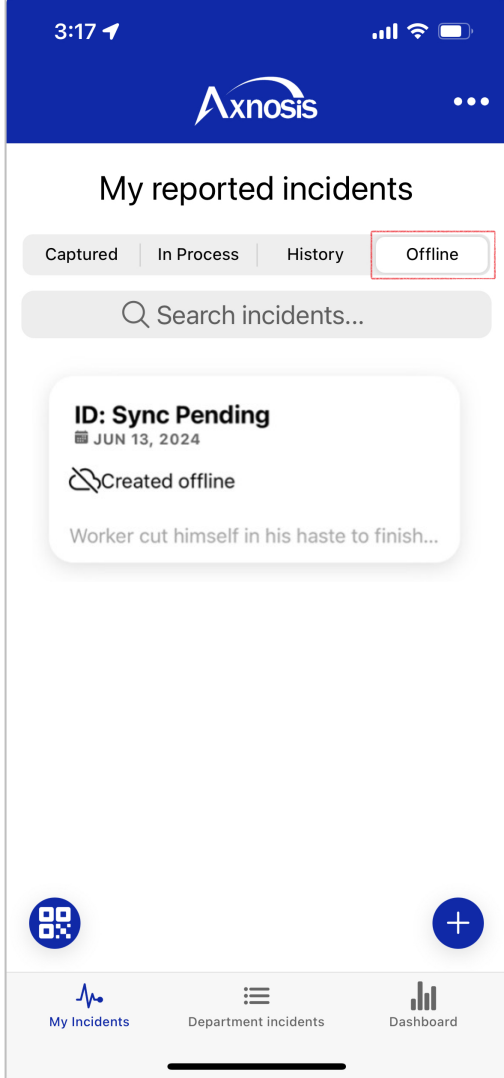
On the **Dashboard** screen an overview of all the open incidents are displayed under the following views:

- **Type** - In a bar chart view
- **Severity** - In a pie chart view

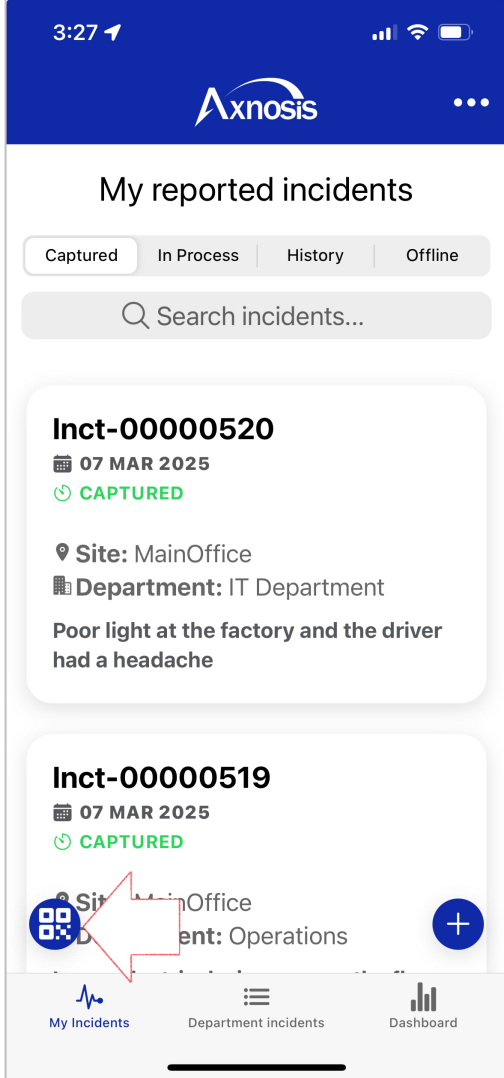
MOBILE APP



3.2.4 Offline capturing of incidents via mobile device

TALKING POINTS AND STEPS	MOBILE APP
<p>Even when the mobile device is in an area with no service signal/Wi-Fi coverage, the user can still record incidents.</p> <p>Offline incidents can be recorded if:</p> <ul style="list-style-type: none"> • The user is logged into a mobile session while being online • The user's login session has not yet expired <p>For OFFLINE mode, the same steps are followed as creating a new incident on the Report an incident screen.</p> <p>When the offline incident creation is complete, the newly created offline incident will appear on the My reported incidents screen under the Offline tab.</p> <p>All offline incidents will be pushed to D365, in order of date once a connection is established. The offline incidents will display the incident summary and Incident id pending which indicates that no number sequence has been allocated to the incident record yet.</p> <p>Once a connection is established, the OFFLINE tab's event records will be moved to the All events > Created (CREATED tab) screen, displaying all the events logged to D365, in order of date. This list is similar to the D365 path:</p> <ul style="list-style-type: none"> • OHS > Incidents > All reported incidents <p>Once an offline event has been created as a record in D365, the offline record will be removed from the All events>Offline screen.</p>	

3.2.5 Using the QR code

TALKING POINTS AND STEPS	MOBILE APP
<p>Details of incidents that have been captured on D365 can be added to the mobile app by scanning the QR code in D365.</p> <p>The user will simply click on the QR code icon in the bottom left hand side corner of the screen and scan the QR code that was generated for the incident under: HSE > Setup > QR code generator. Details of the incident will immediately appear on the mobile app</p>	 <p>The screenshot shows the Axnosis mobile app interface. At the top, there's a status bar with the time 3:27 and signal indicators. Below the Axnosis logo, the title 'My reported incidents' is displayed. There are four tabs: 'Captured', 'In Process', 'History', and 'Offline'. A search bar with the placeholder 'Search incidents...' is present. Two incident cards are shown. The first card is for 'Inct-00000520' dated '07 MAR 2025' with a 'CAPTURED' status. It lists 'Site: MainOffice' and 'Department: IT Department' with the description 'Poor light at the factory and the driver had a headache'. The second card is for 'Inct-00000519' dated '07 MAR 2025' with a 'CAPTURED' status. It lists 'Site: MainOffice' and 'Department: Operations'. A red arrow points to a QR code icon in the bottom left corner of the second incident card. The bottom navigation bar has three items: 'My Incidents' (active), 'Department incidents', and 'Dashboard'.</p>

3.2.6 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"> • Displays the D365 Legal entity that the user belongs to • The Refresh data button is used to update the app with recently captured data (via the app and D365) • Help button • Logout 	