Axnosis

Demo script – Inspections Mobile App

Microsoft Dynamics 365 FO

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Foreword

It is highly desirable that a program be set up to monitor and inspect the specific object/location.
Such an inspection program will:

- Enable control measures to be checked,
- Enable work practices to be observed,
- Permit the monitoring of risk management performance,
- Provide a mechanism for identifying hazards.

An inspection program should initially identify the areas and/or equipment to be inspected, as well as the frequency of inspection.
Someone should be made responsible for carrying out inspections.
A checklist should be prepared for each area to be inspected.
The checklist should include the most significant hazards as well as the controls that are expected in the area.
The inspection program should include:

- Physical features, such as checking that guards are in place and goods are being stored in the correct areas.
- Checks to see that the correct working practices are being followed.

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

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Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
TEST SCRIPT – INSPECTIONS – OHS004	01/09/2022	3.12	HENNIE VAN DEN BERG

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
13/09/2022	2	KRISTIAN JORDAAN	RIAAN VAN DER BERG
06/03/2025	3	KAYLEN VAN DER BERG	RIAAN VAN DER BERG

Table 2: Change and Version History

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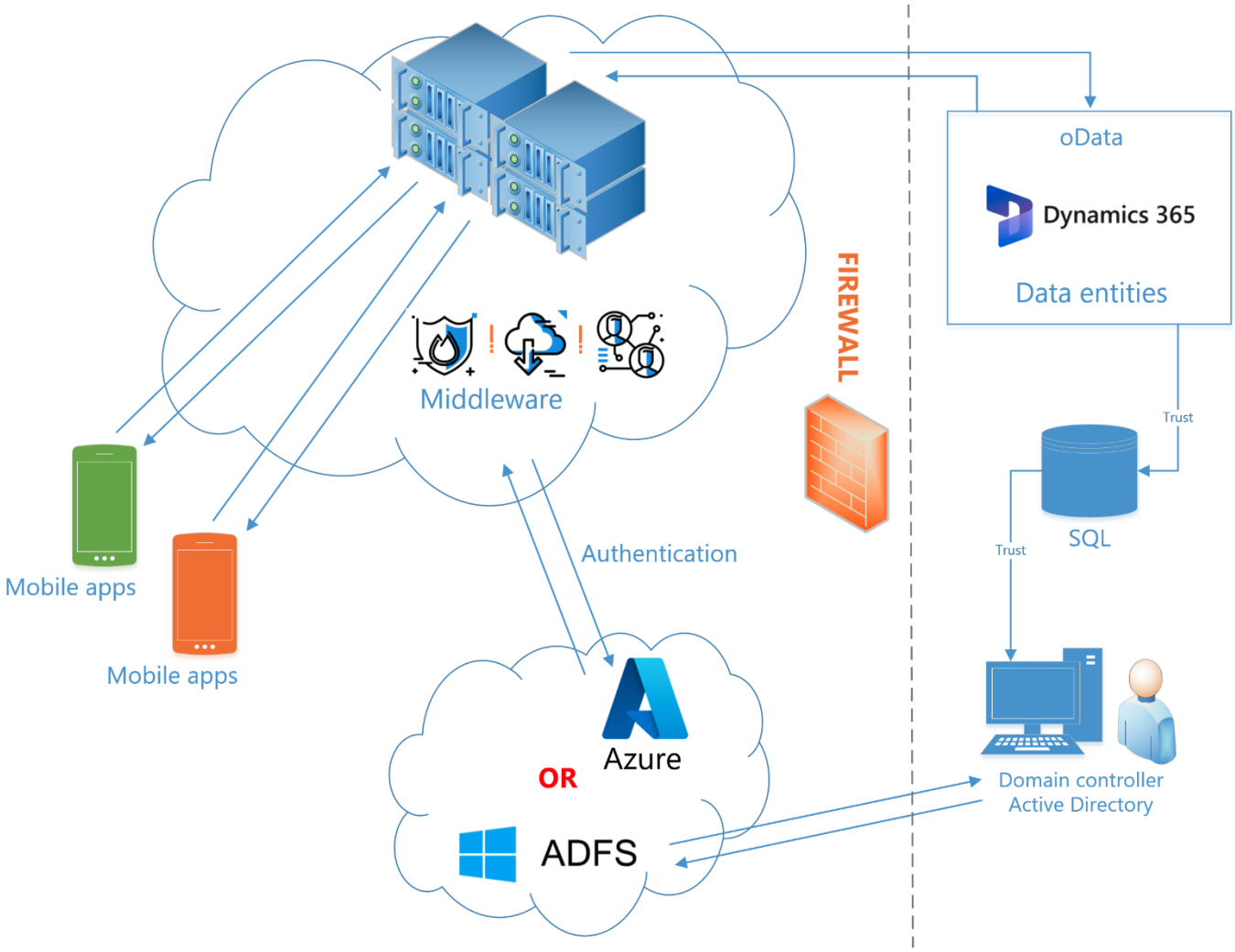
1. Technology

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



2. Demo setup

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

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3. Demo script

3.1 Demo background

- Through this Inspection mobile application, the recording of inspections into D365 is easily done from any iOS or Android mobile device. Once inspections have been done, inspection administrators can evaluate and progress these records further within D365. Subsequently users can view changes to inspections from their mobile devices.

3.2 Demo Scenario

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

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

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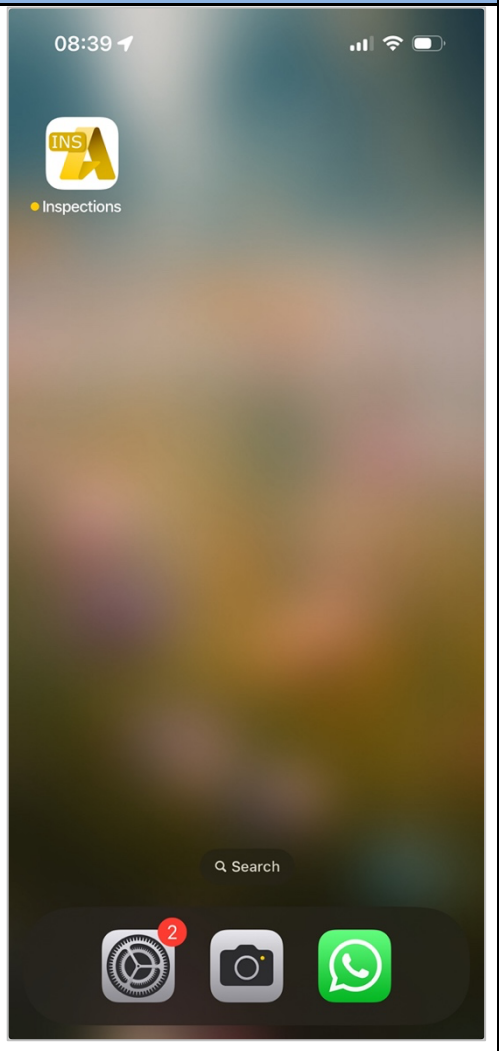
3.3 Recording an inspection via the D365 Inspections mobile app

TALKING POINTS AND STEPS	MOBILE APP
Inspector: A user is ready to do his routine vehicle inspection on the forklifts in the factory warehouse. The user takes out his/her mobile phone and taps on the **Inspections** (INS) icon.	

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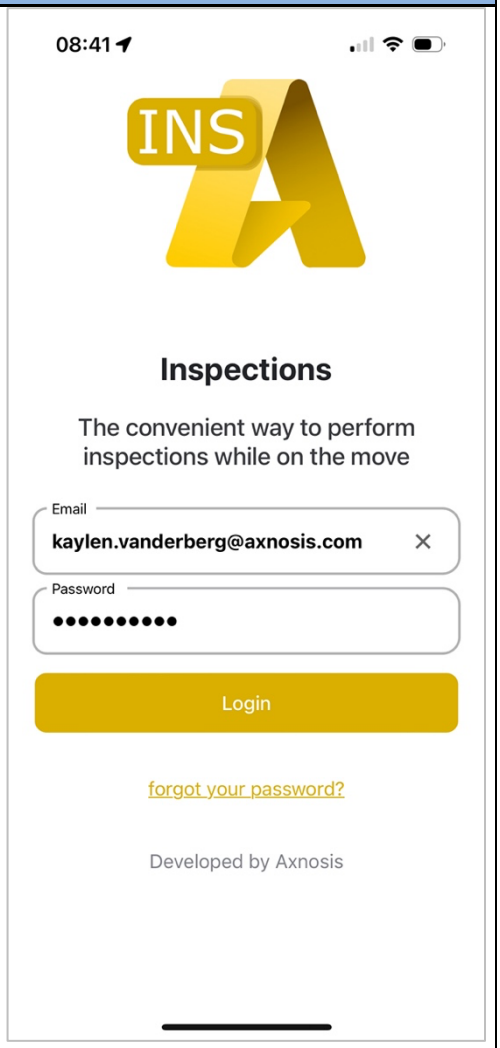
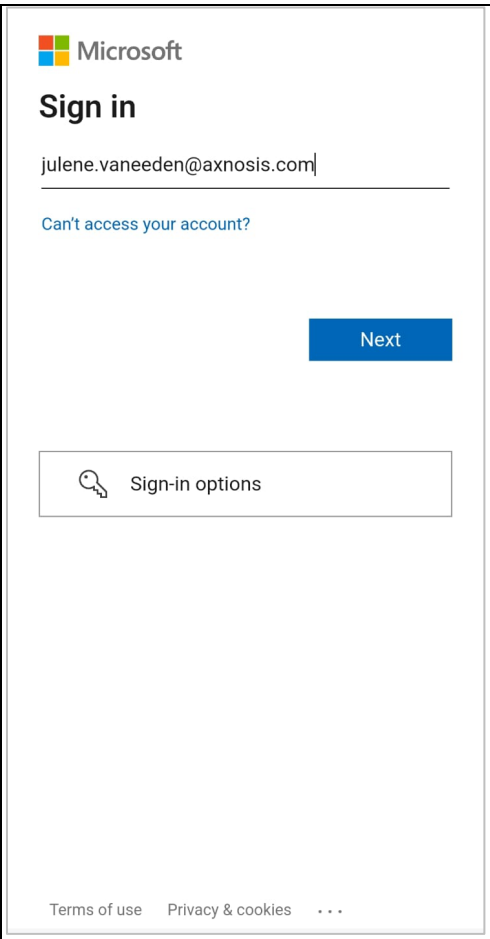
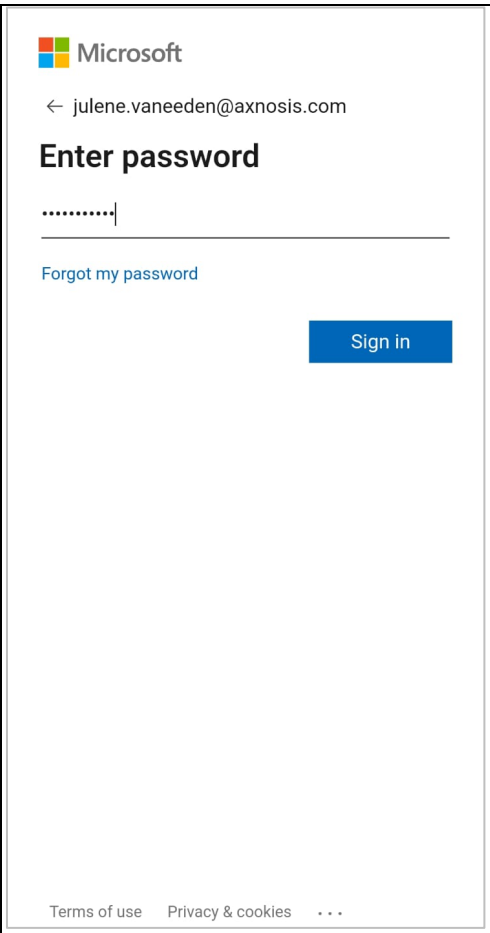
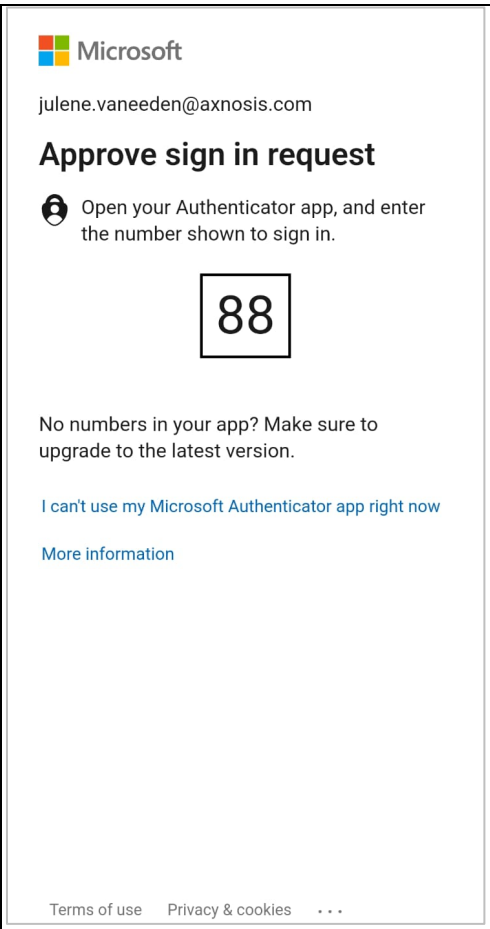
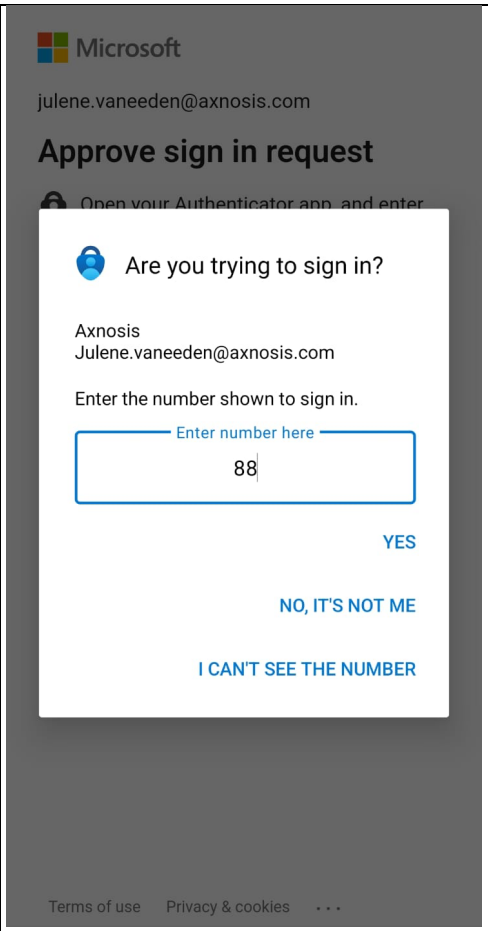
TALKING POINTS AND STEPS	MOBILE APP
The logo on the **login** screen appears … The user's D365 login details (**Username** and **Password**) are entered and used by the app for validation. The user then taps on the **Login** button to log into the app session.	

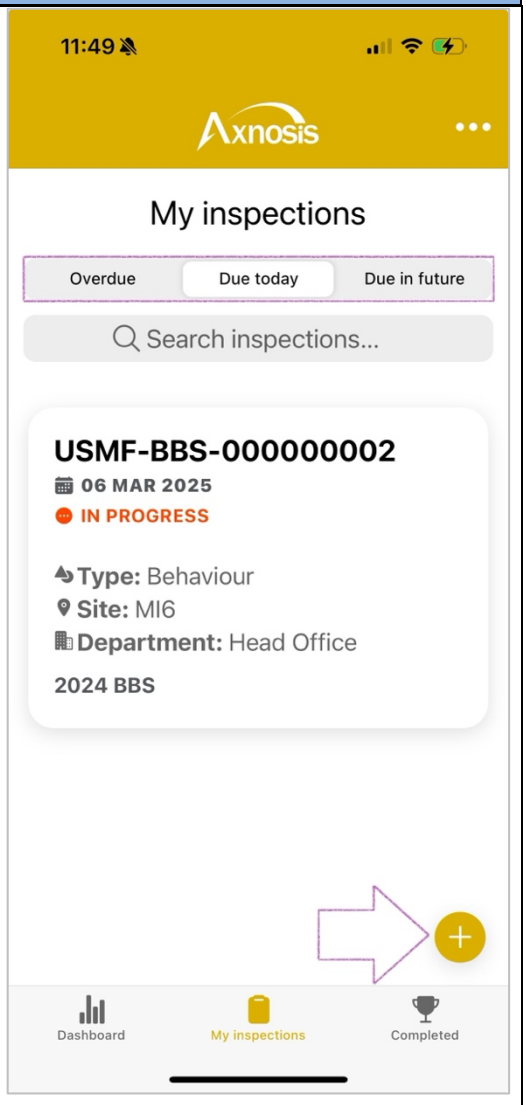
If multi-factor authentication has been enabled for the organization, Microsoft sign in may required in addition to the application sign in. During the initial sign in, the Microsoft sign in may have to be completed twice. The Microsoft sign in will not be required during every sign in to the mobile 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.	

Enter the **password** for the Microsoft account entered. Click on the **Sign in** button to continue.	

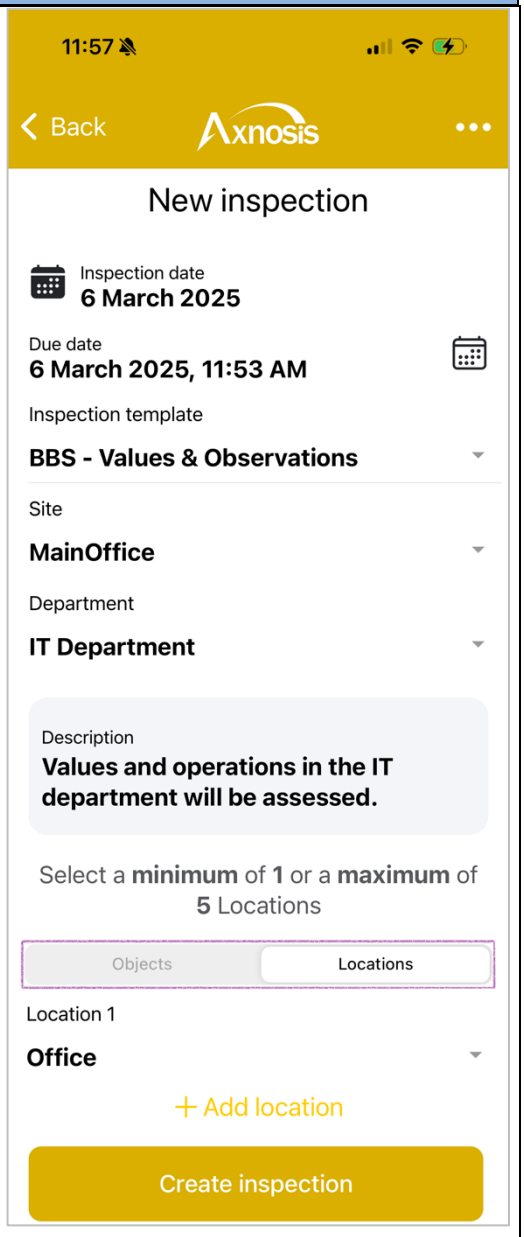
If multi-factor authentication is enabled, the **authentication number** may be displayed. Take note of the number for entry in the authenticator app.	

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.	

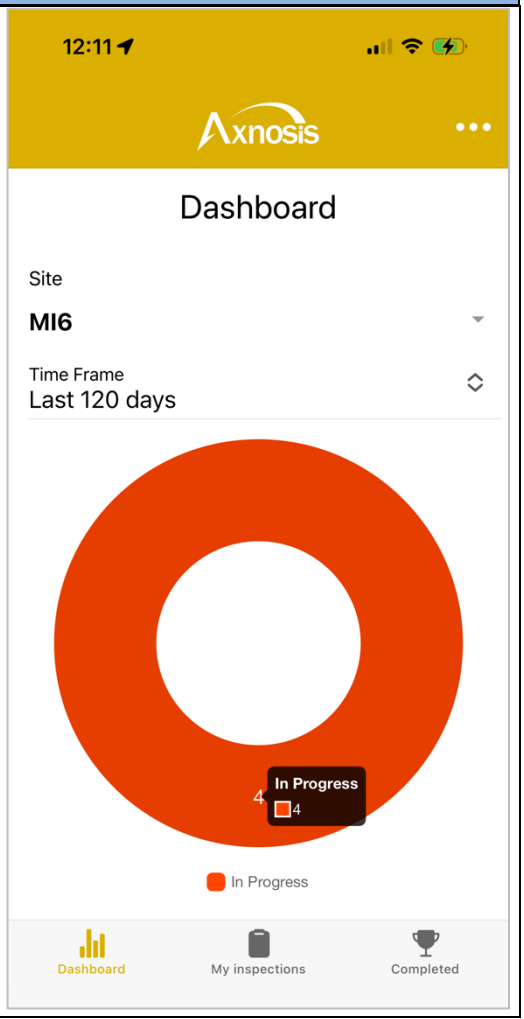
3.3.1 Viewing the inspection details via the D365 Inspections mobile app

TALKING POINTS AND STEPS	MOBILE APP
The **My inspections** screen/Tab will open. The user can choose to see: • All **overdue** inspections • All inspections **due today** • All inspections **due in the future** To create a new inspection, tap on the **+plus** button.	

3.3.2 Create a new inspection via the D365 Inspections mobile app

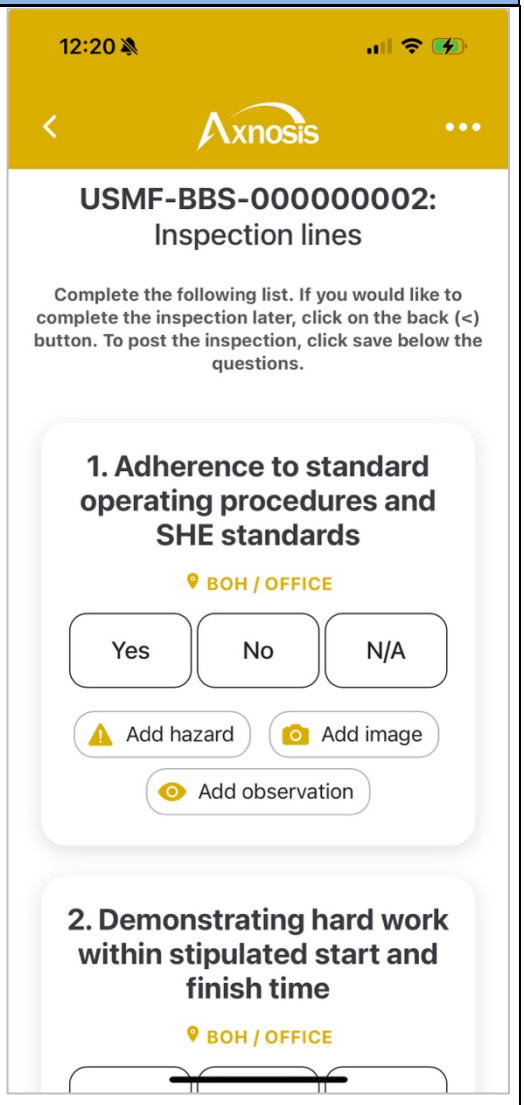
TALKING POINTS AND STEPS	MOBILE APP
The **New inspections** screen opens, and the user can enter the following information: • **Date and time of incident** • **Inspection template** • **Site** • **Department** • **Description** • Select the **Object/Location** that has to be inspected If more than one object/location has to be inspected, tap on the **Add Object/Add Location** button and select the relevant details When all the Objects/Locations have been selected, tap on the **Create Inspection** button. (A red line indicates a field that is mandatory for the risk assessment to be completed)	

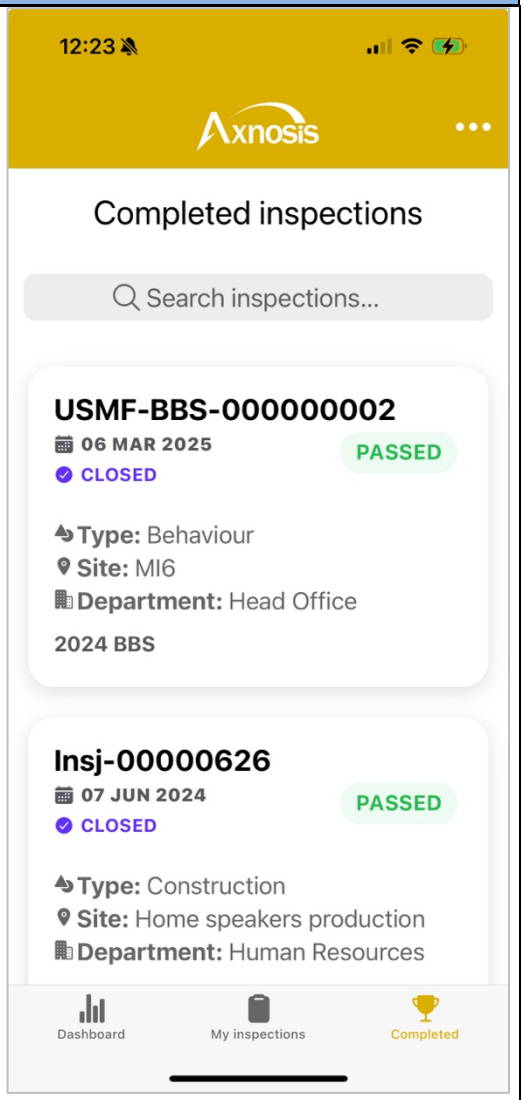
3.3.3 View Dashboard for an overview of all Inspection captured.

TALKING POINTS AND STEPS	MOBILE APP
Open the **Dashboard** screen/Tab where the user can see an overview of all the inspections that have been captured via the **Inspections app** and D365. The user can filter on the **Site,** to view specific inspections that have been done. There is also a **Time frame** filter to narrow down the search.	

3.3.4 Performing an inspection via the D365 Inspections mobile app

TALKING POINTS AND STEPS	MOBILE APP

Go to **My Inspections**. To perform an inspection that is due, tap on the relevant **inspection**.
 	
The **Inspection Lines** screen will open. Tap on the **Save & Post** button.
 	
Complete the inspection by choosing **Yes**, **No**, or **NA**.
 	
If required:
 	
• Add a hazard
• Add an image
  ○ From photos
  ○ Take a picture
• Add an observation
 	
Tap on the **Save & Post** button.
	

TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Completed** button to view the completed inspection.	

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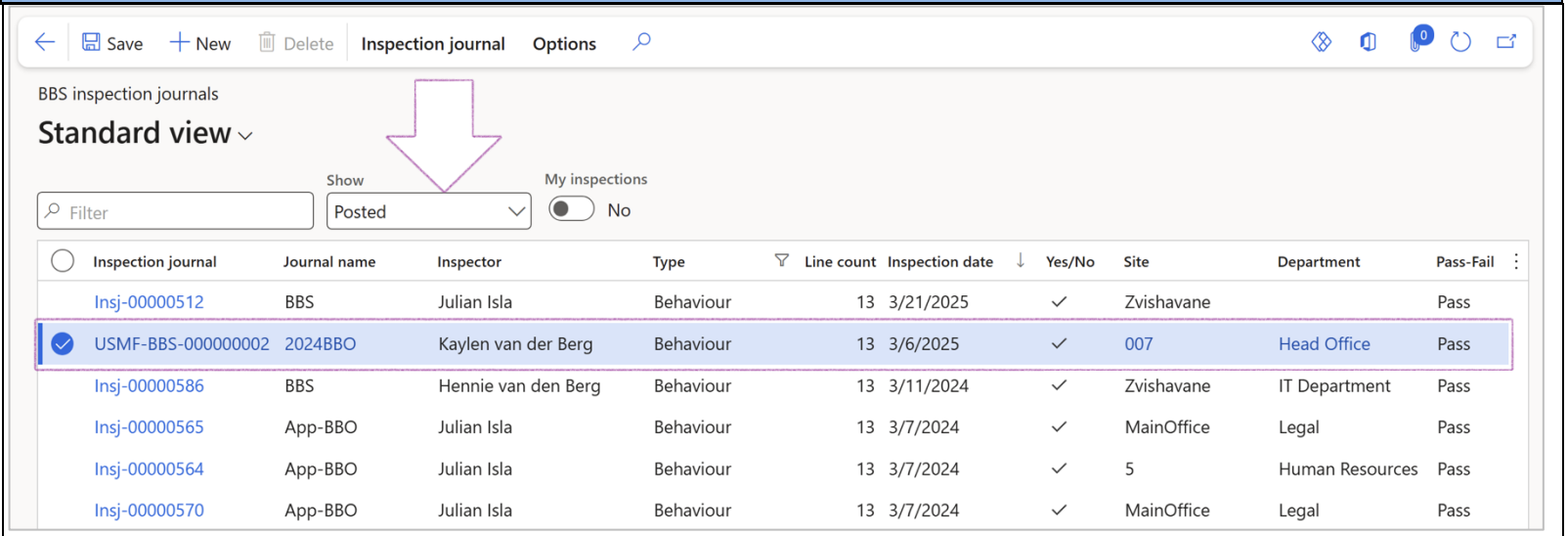
3.4 Viewing the "mobile created" inspection inside D365

TALKING POINTS AND STEPS	DYNAMICS OHS 365 MODULE
Inspector: The mobile created inspection can be viewed inside D365 – log into D365 and navigate to the **OHS** module. Go to: **OHS > Inspections > All Inspection journals** Filter the inspections to show the **Posted** options. Click on the Inspection that you want to see the details of.	

Inspection journal	Journal name	Inspector	Type	Line count	Inspection date	Yes/No	Site	Department	Pass-Fail
Insj-00000512	BBS	Julian Isla	Behaviour	13	3/21/2025	✓	Zvishavane		Pass
USMF-BBS-000000002	2024BBO	Kaylen van der Berg	Behaviour	13	3/6/2025	✓	007	Head Office	Pass
Insj-00000586	BBS	Hennie van den Berg	Behaviour	13	3/11/2024	✓	Zvishavane	IT Department	Pass
Insj-00000565	App-BBO	Julian Isla	Behaviour	13	3/7/2024	✓	MainOffice	Legal	Pass
Insj-00000564	App-BBO	Julian Isla	Behaviour	13	3/7/2024	✓	5	Human Resources	Pass
Insj-00000570	App-BBO	Julian Isla	Behaviour	13	3/7/2024	✓	MainOffice	Legal	Pass

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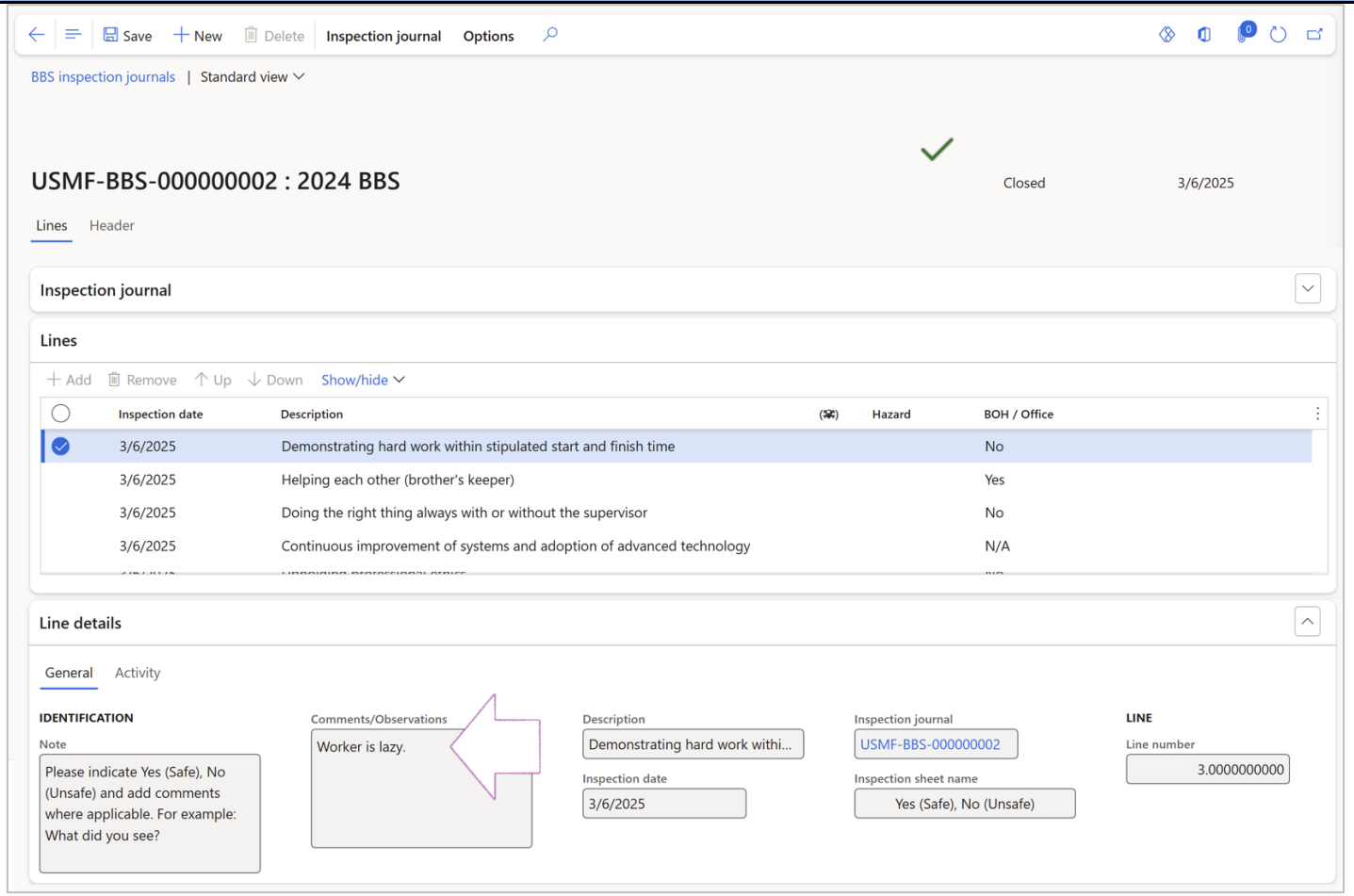
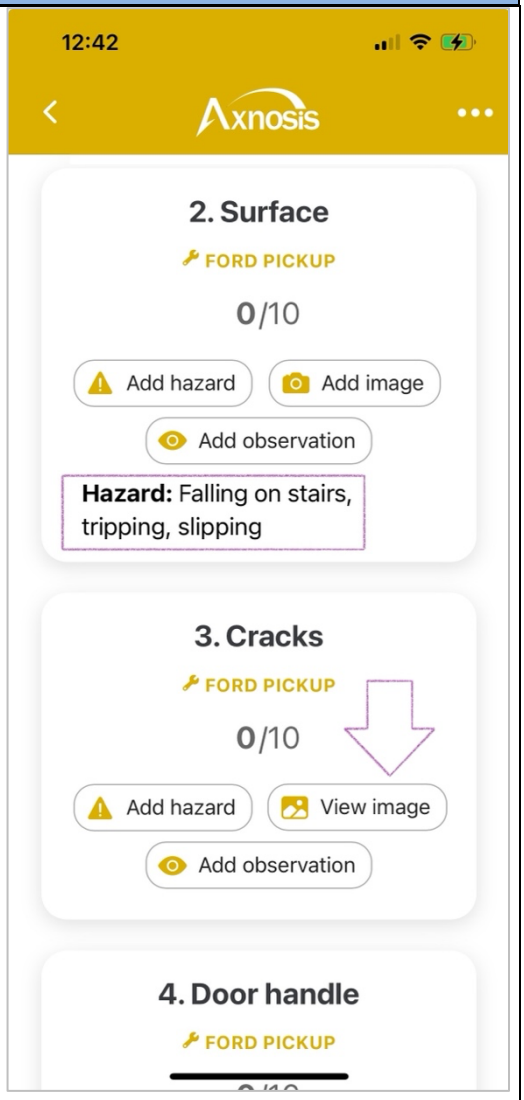
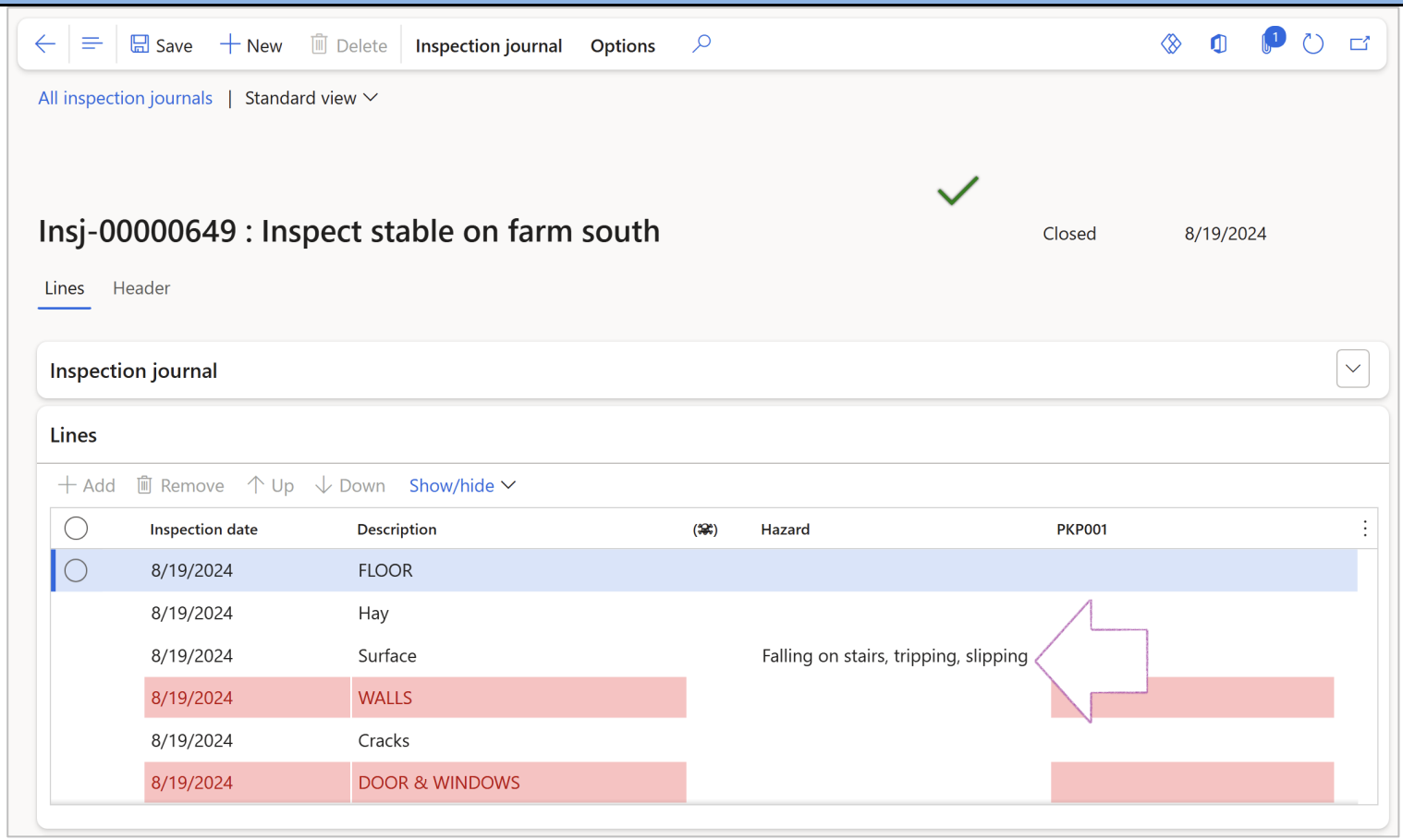
TALKING POINTS AND STEPS	MOBILE APP
The **Inspection journal** detail page will open. Open the **Lines** view to see the details. You can view the **Comments/Observations**.	

TALKING POINTS AND STEPS	MOBILE APP
As mentioned under stap 3.3.4., if a hazard is applicable to the inspection, it can be added by clicking on the hazard button. If an image is added, click on the **View Image** button to see it. (see arrow)	

TALKING POINTS AND STEPS	MOBILE APP
In D365, go to: **HSE > Inspections > All inspection journals.** Select relevant inspection. Go to **Lines** view and see the line where the hazard was added.	

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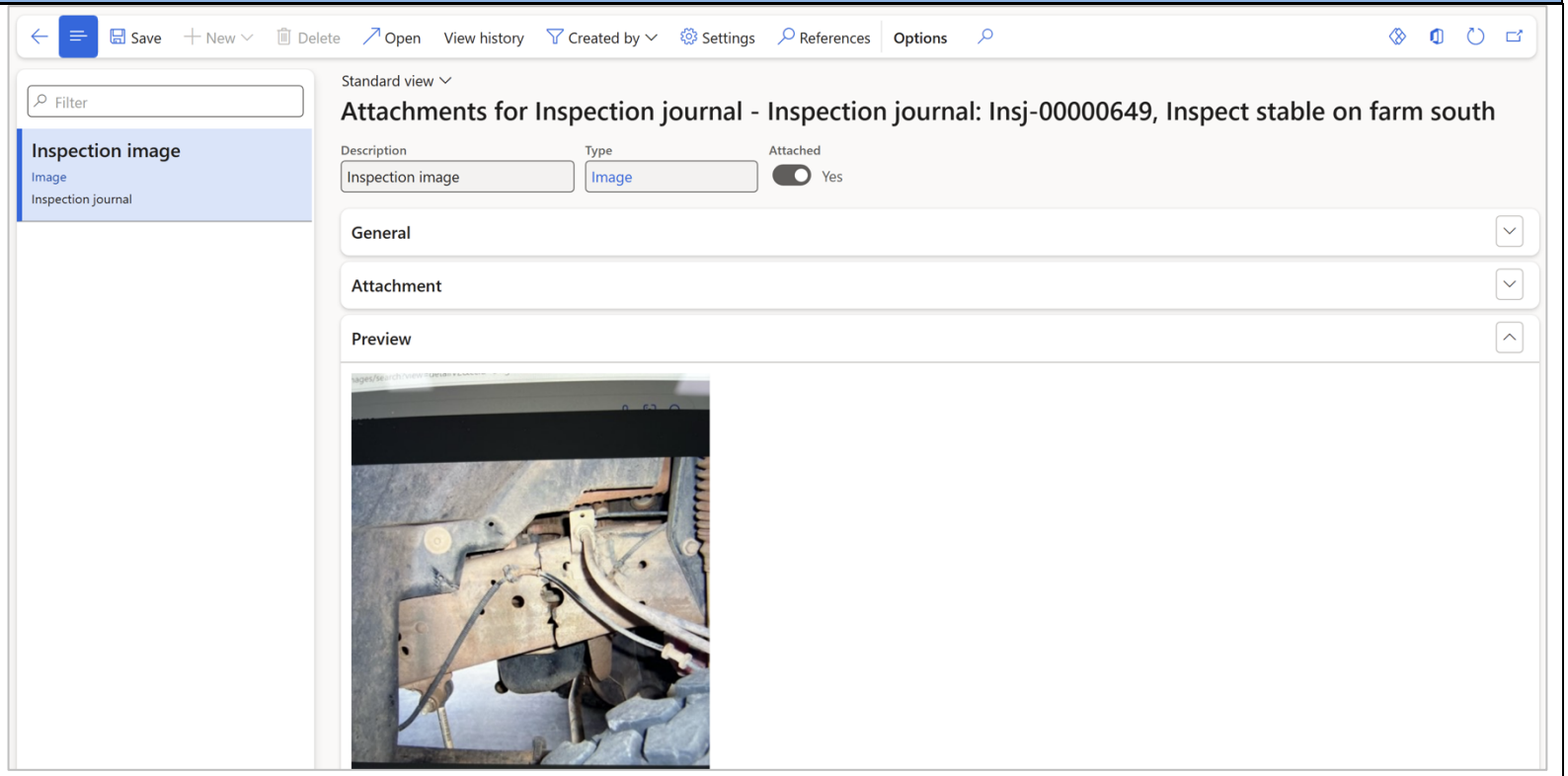
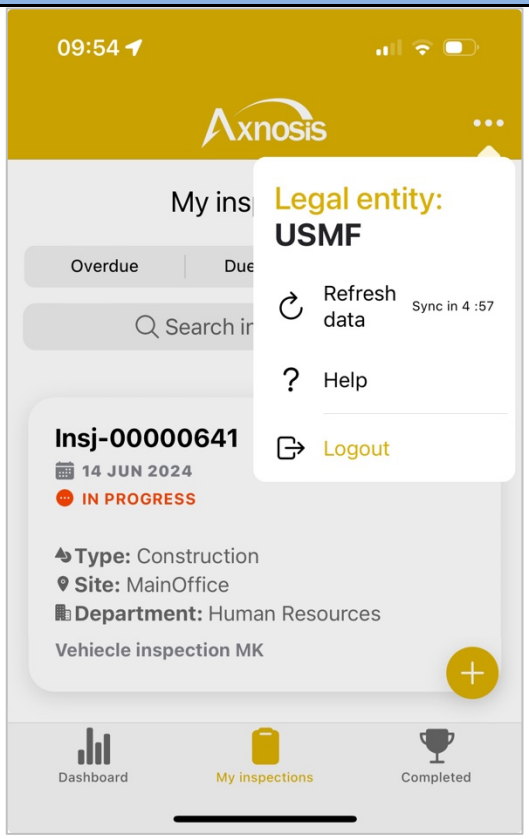
TALKING POINTS AND STEPS	MOBILE APP
To view the attached image, select the line with the image and click on the attachment icon in the top right corner. The attachment form will open where the user can view the image.	

3.5 Viewing the ellipsis via the D365 Inspections mobile app

TALKING POINTS AND STEPS	MOBILE APP
The **ellipsis** at the top of the screen provides the following functions: • 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**