



Axnosis

Demo script – Inspections Mobile App

Microsoft Dynamics 365 FO



Document Date:
2025-03-06

Document Status
Draft

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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.

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

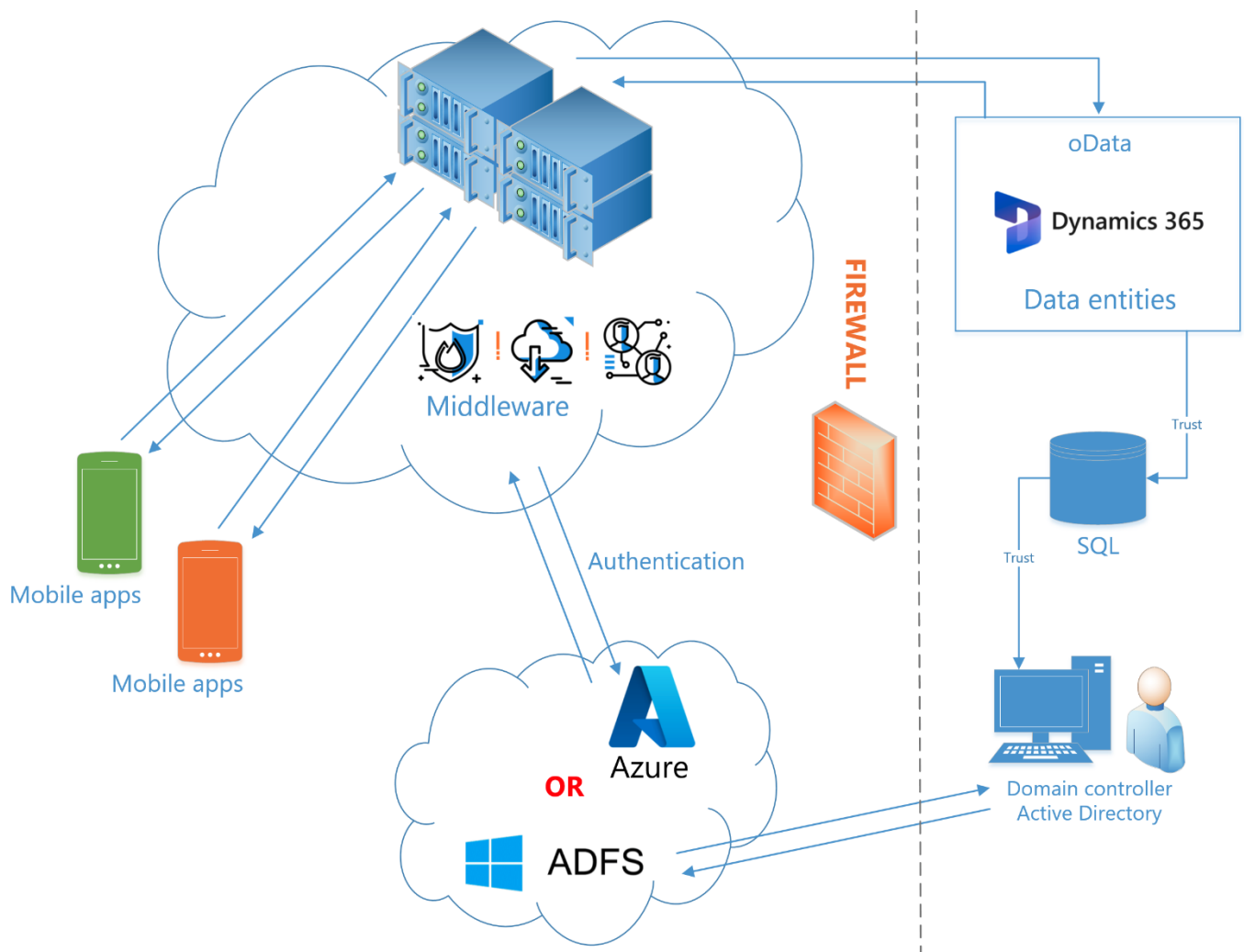
Table 2: Change and Version History

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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

3. Demo script

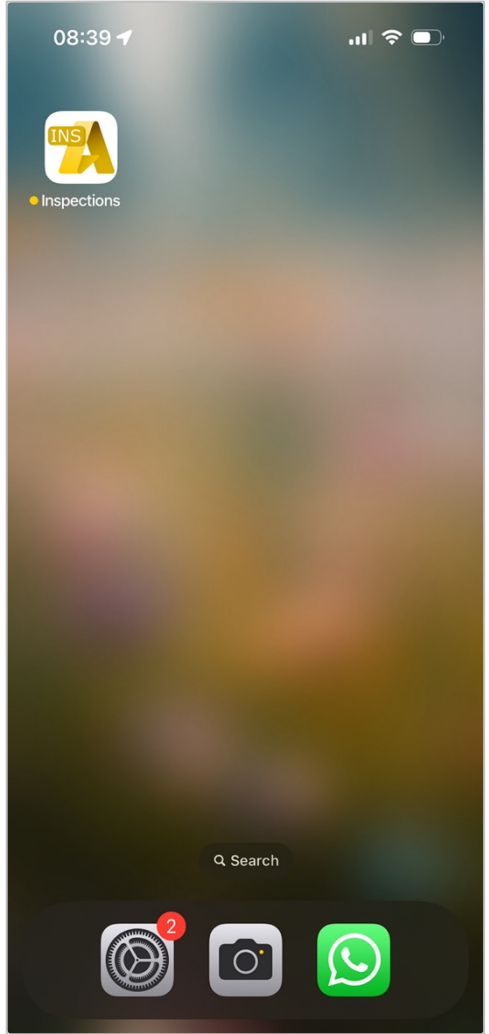
3.1 Demo background

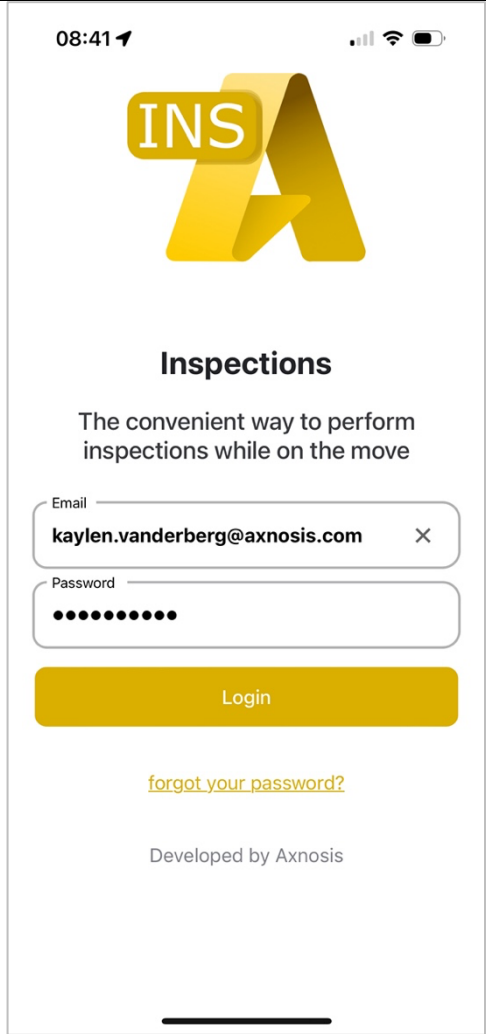
- Through this Inspection mobile application, the recording of inspections into D365 is easily done from any iOS or Android mobile device. Once inspections have been done, inspection administrators can evaluate and progress these records further within D365. Subsequently users can view changes to inspections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

3.3 Recording an inspection via the D365 Inspections mobile app

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

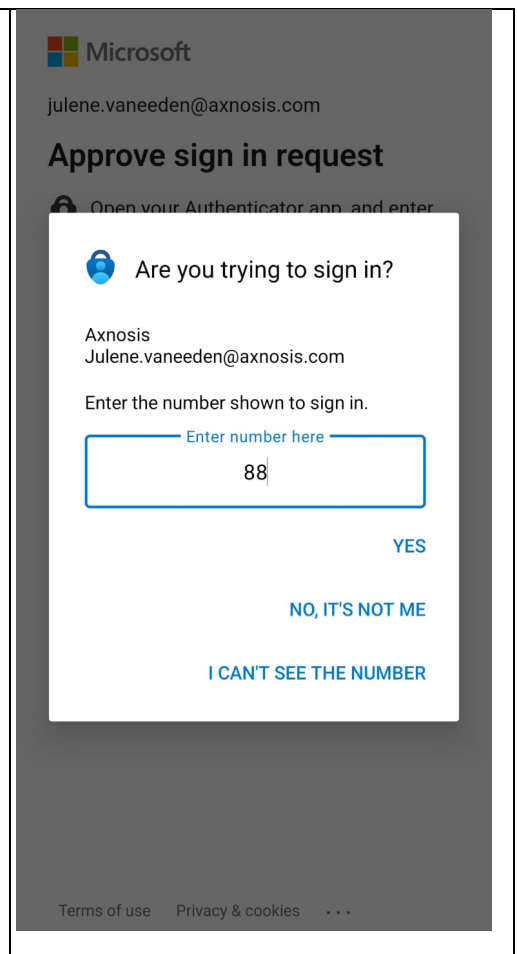
[I can't use my Microsoft Authenticator app right now](#)

[More information](#)

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

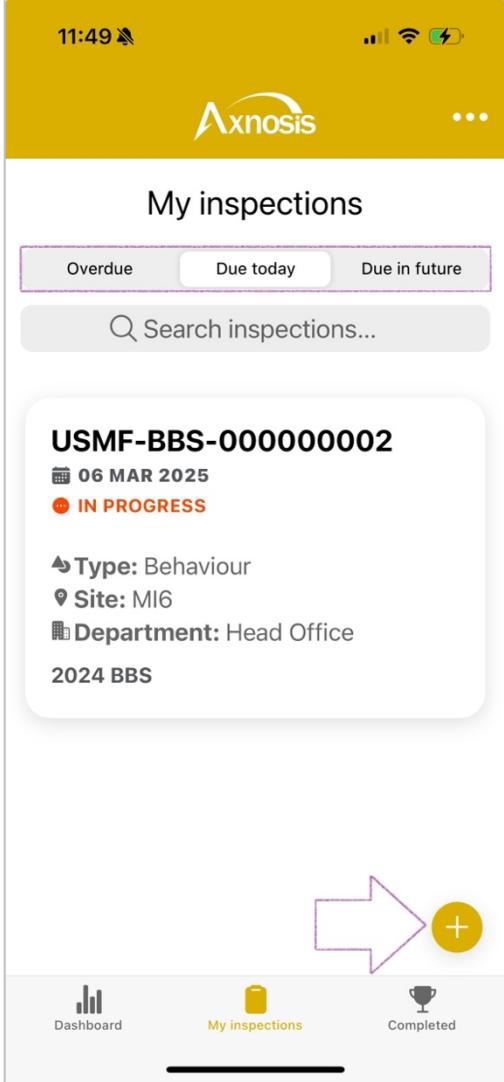
A notification may appear requiring the authentication number to be entered or the user may opt to access the authenticator app manually to complete the authentication process.

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

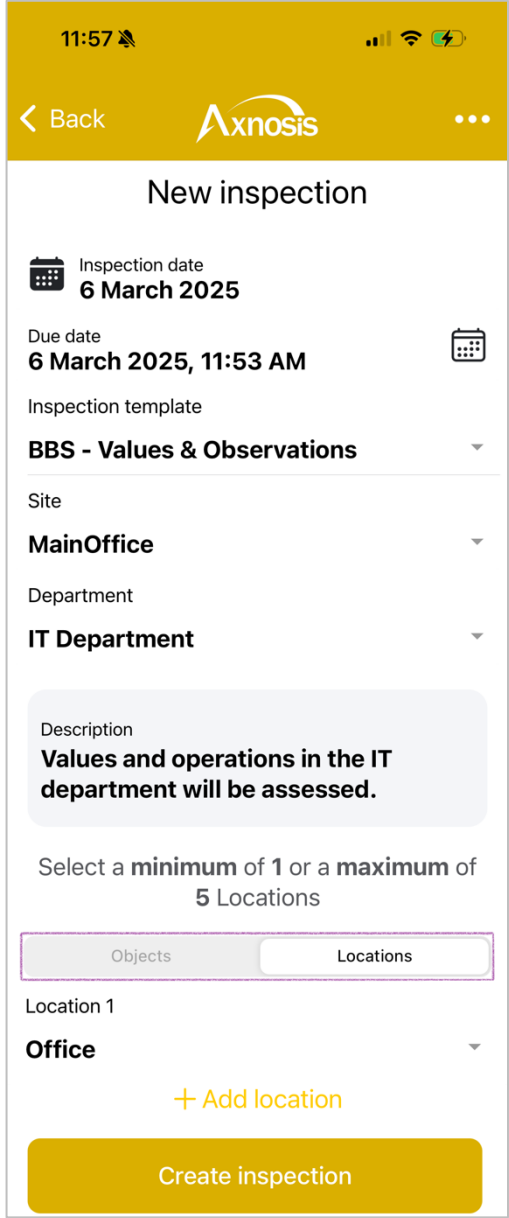


The screenshot shows a Microsoft authentication interface. At the top, it says 'Microsoft' with the logo, followed by the email 'julene.vaneeden@axnosis.com'. Below this is the heading 'Approve sign in request'. A sub-header says 'Open your Authenticator app, and enter'. A white modal box is centered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

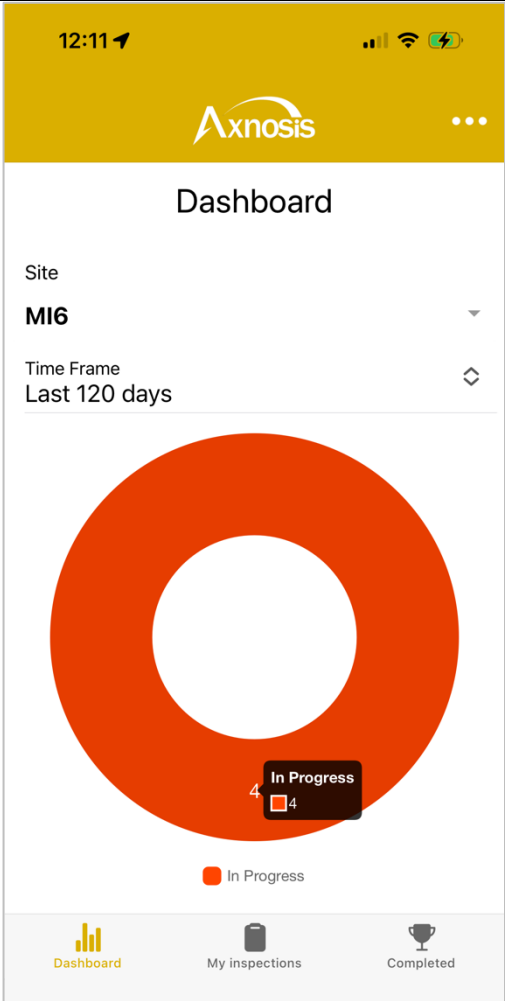
3.3.1 Viewing the inspection details via the D365 Inspections mobile app

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

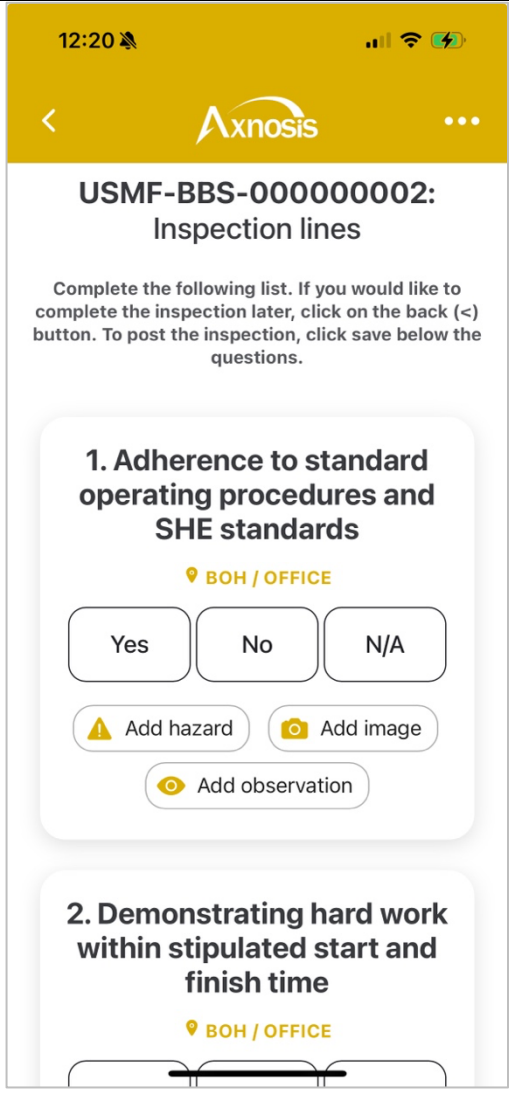
3.3.2 Create a new inspection via the D365 Inspections mobile app

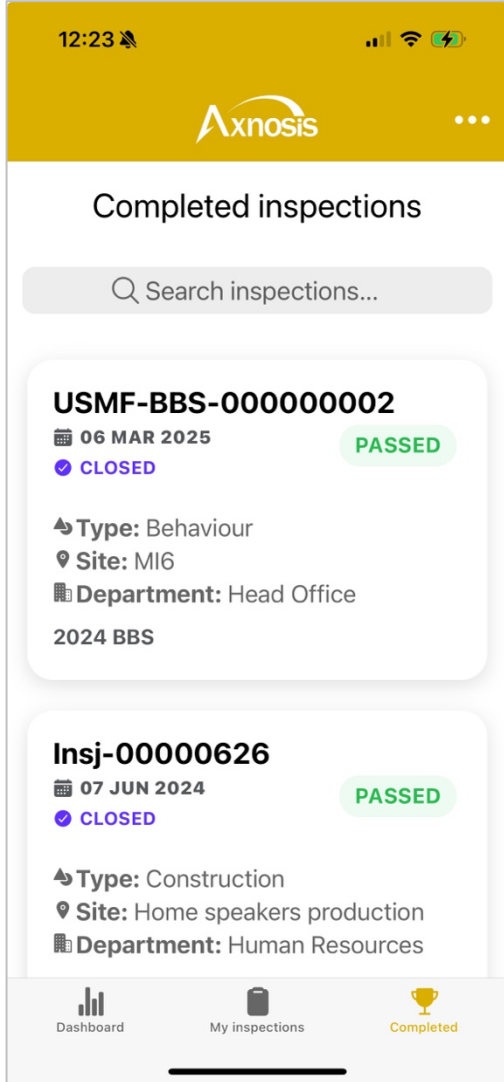
TALKING POINTS AND STEPS	MOBILE APP
<p>The New inspections screen opens, and the user can enter the following information:</p> <ul style="list-style-type: none"> • Date and time of incident • Inspection template • Site • Department • Description • Select the Object/Location that has to be inspected If more than one object/location has to be inspected, tap on the Add Object/Add Location button and select the relevant details <p>When all the Objects/Locations have been selected, tap on the Create Inspection button.</p> <p>(A red line indicates a field that is mandatory for the risk assessment to be completed)</p>	

3.3.3 View Dashboard for an overview of all Inspection captured.

TALKING POINTS AND STEPS	MOBILE APP
<p>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.</p> <p>The user can filter on the Site, to view specific inspections that have been done.</p> <p>There is also a Time frame filter to narrow down the search.</p>	

3.3.4 Performing an inspection via the D365 Inspections mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>Go to My Inspections. To perform an inspection that is due, tap on the relevant inspection.</p> <p>The Inspection Lines screen will open. Tap on the Save & Post button.</p> <p>Complete the inspection by choosing Yes, No, or NA.</p> <p>If required:</p> <ul style="list-style-type: none"> • Add a hazard • Add an image <ul style="list-style-type: none"> ○ From photos ○ Take a picture • Add an observation <p>Tap on the Save & Post button.</p>	 <p>The screenshot shows the mobile app interface. At the top, there's a yellow header with the Axnosis logo. Below it, the inspection ID 'USMF-BBS-000000002' is displayed. The main section is titled 'Inspection lines' and contains a list of inspection items. The first item is '1. Adherence to standard operating procedures and SHE standards', which has a location tag 'BOH / OFFICE' and three buttons: 'Yes', 'No', and 'N/A'. Below this, there are three buttons: 'Add hazard' (with a warning icon), 'Add image' (with a camera icon), and 'Add observation' (with an eye icon). The second item is '2. Demonstrating hard work within stipulated start and finish time', also with a location tag 'BOH / OFFICE'.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Completed button to view the completed inspection.</p>	 <p>The screenshot shows the Axnosis mobile app interface. At the top is a yellow header with the Axnosis logo and a menu icon. Below the header is the title 'Completed inspections' and a search bar labeled 'Search inspections...'. There are two inspection cards displayed. The first card is for 'USMF-BBS-000000002' dated '06 MAR 2025', with a status of 'PASSED' and 'CLOSED'. It lists 'Type: Behaviour', 'Site: MI6', and 'Department: Head Office' with '2024 BBS' below. The second card is for 'Insj-00000626' dated '07 JUN 2024', also with a status of 'PASSED' and 'CLOSED'. It lists 'Type: Construction', 'Site: Home speakers production', and 'Department: Human Resources'. At the bottom is a navigation bar with three icons: 'Dashboard', 'My inspections', and 'Completed' (which is highlighted with a trophy icon).</p>



3.4 Viewing the “mobile created” inspection inside D365

TALKING POINTS AND STEPS

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.

DYNAMICS OHS 365 MODULE

←

Save

+ New

Delete

Inspection journal

Options

🔍

🔗

📋

🔔 0

🔄

📧

BBS inspection journals

Standard view ▾

🔍 Filter

Show

Posted ▾

My inspections

●

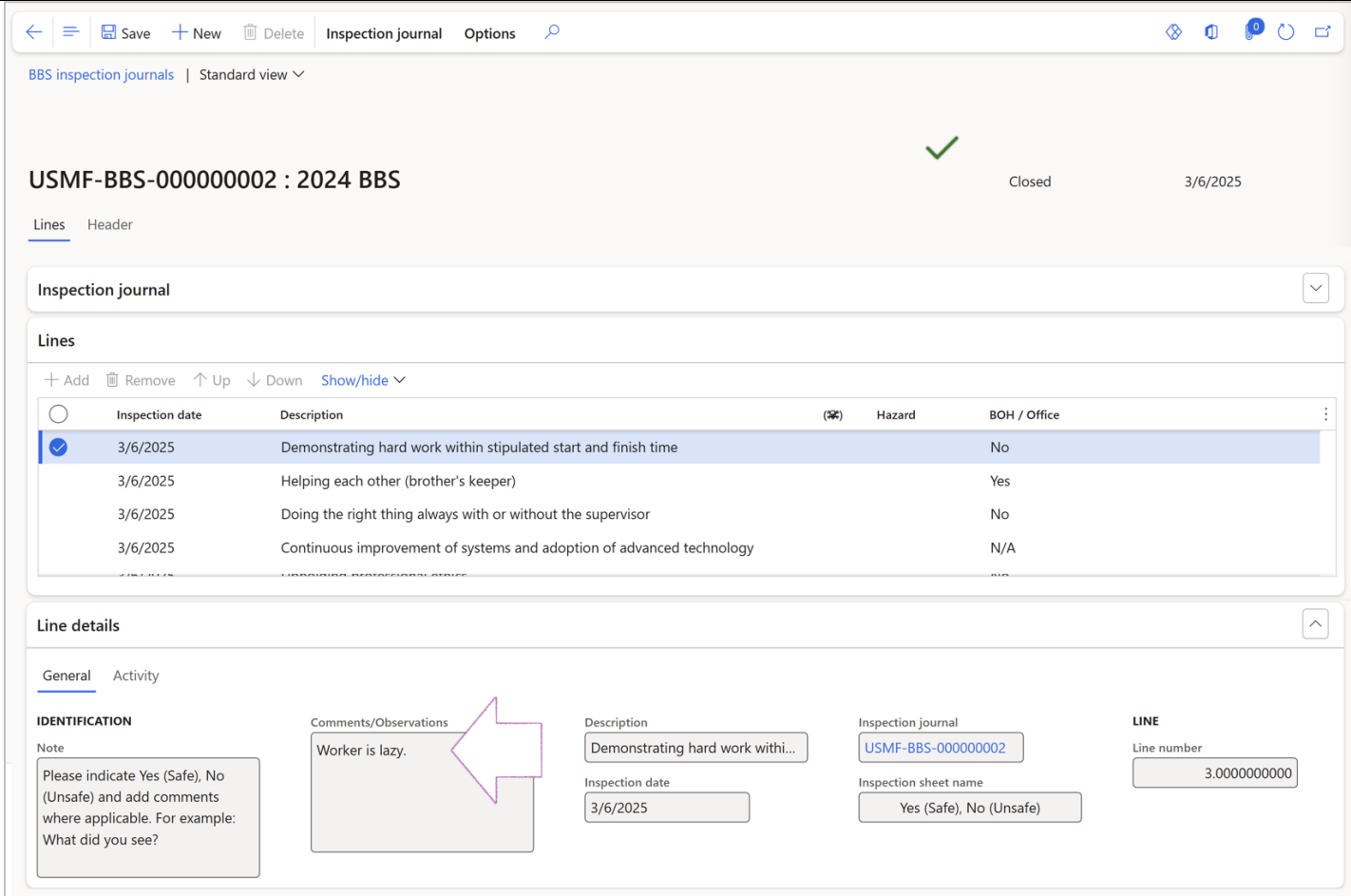
No

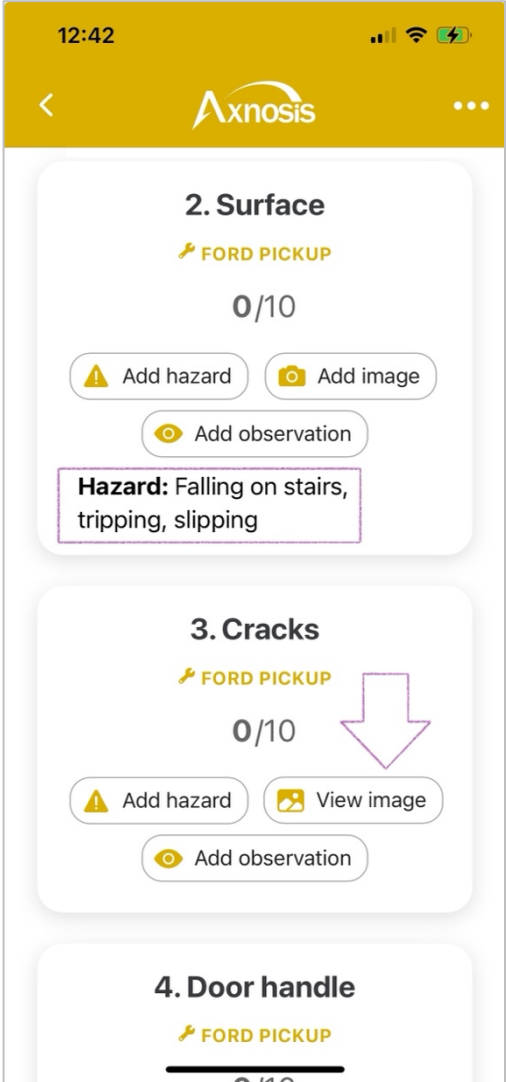
<input type="radio"/>	Inspection journal	Journal name	Inspector	Type	🔼	Line count	Inspection date	↓	Yes/No	Site	Department	Pass-Fail	⋮
	Insj-00000512	BBS	Julian Isla	Behaviour		13	3/21/2025		✓	Zvishavane		Pass	
<input checked="" type="radio"/>	USMF-BBS-000000002	2024BBO	Kaylen van der Berg	Behaviour		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	

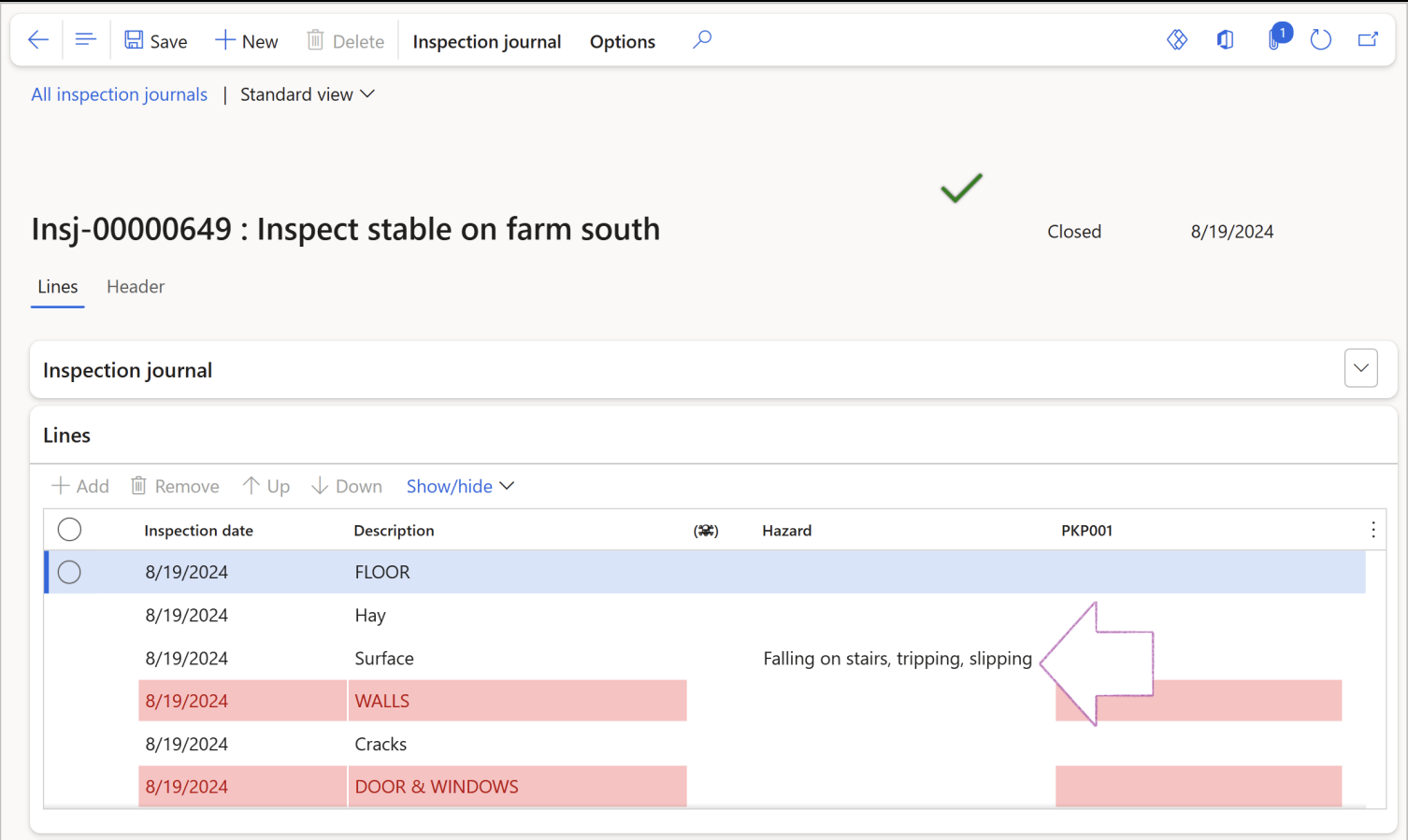


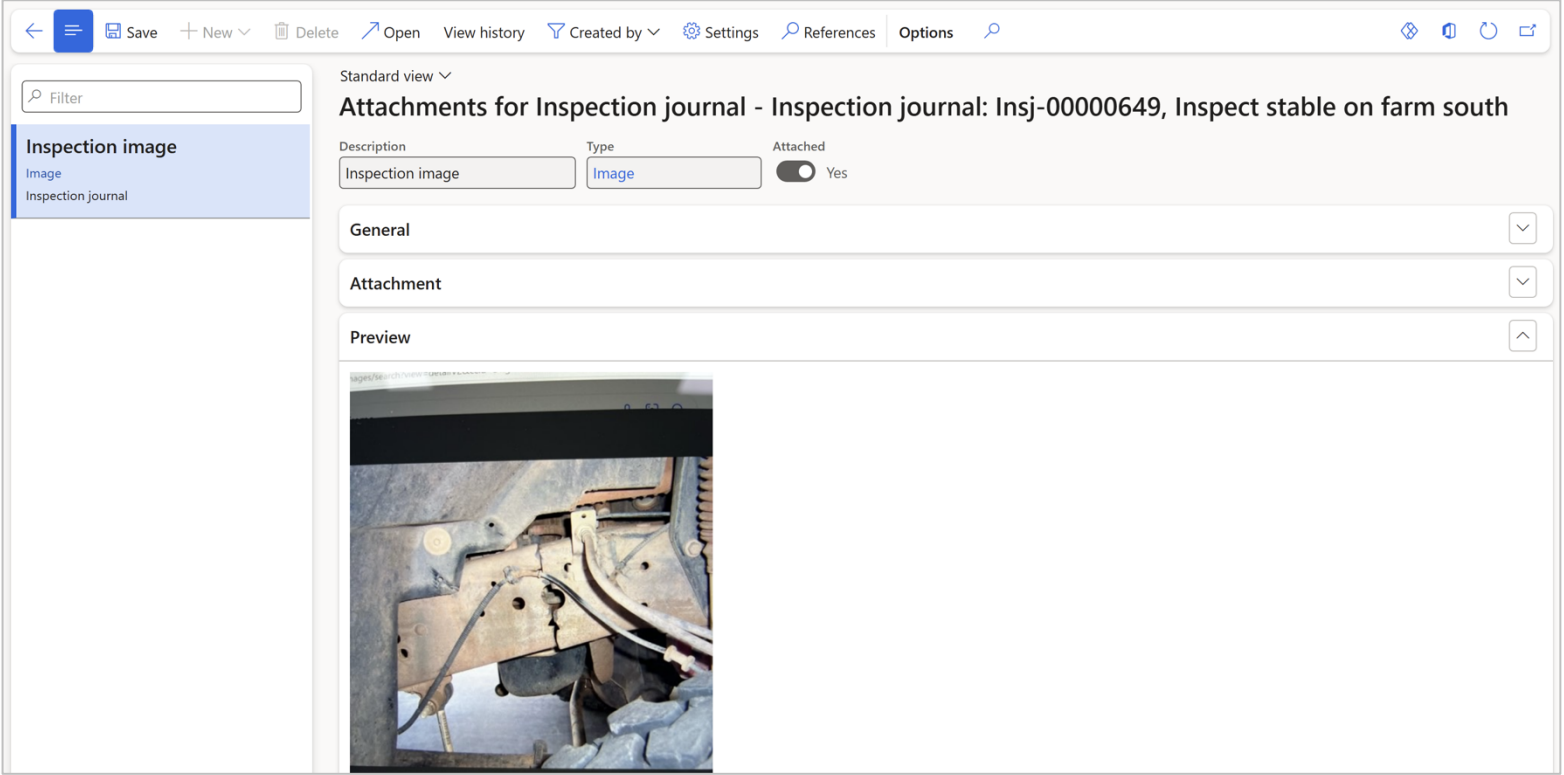
Demo script – Inspections Mobile App draft

Microsoft Dynamics 365 FO

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

TALKING POINTS AND STEPS	MOBILE APP
<p>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.</p> <p>If an image is added, click on the View Image button to see it. (see arrow)</p>	 <p>The screenshot shows the Axnosis mobile app interface. At the top, the status bar displays the time 12:42, signal strength, Wi-Fi, and battery icons. The app header is yellow with the Axnosis logo and a back arrow on the left, and a menu icon on the right. The main content area shows three inspection steps:</p> <ul style="list-style-type: none"> 2. Surface: Includes a wrench icon, 'FORD PICKUP', a score of '0/10', and buttons for 'Add hazard' (with a warning icon), 'Add image' (with a camera icon), and 'Add observation' (with an eye icon). A text box below the buttons contains the text 'Hazard: Falling on stairs, tripping, slipping'. 3. Cracks: Includes a wrench icon, 'FORD PICKUP', a score of '0/10', and buttons for 'Add hazard' (with a warning icon), 'View image' (with a photo icon), and 'Add observation' (with an eye icon). A large purple arrow points down to the 'View image' button. 4. Door handle: Includes a wrench icon and 'FORD PICKUP'.

TALKING POINTS AND STEPS	MOBILE APP
<p>In D365, go to: HSE > Inspections > All inspection journals.</p> <p>Select relevant inspection.</p> <p>Go to Lines view and see the line where the hazard was added.</p>	 <p>The screenshot displays the 'Inspection journal' screen in the mobile app. At the top, there's a navigation bar with icons for back, menu, save, new, delete, and search. Below this, the title 'Insj-00000649 : Inspect stable on farm south' is shown with a green checkmark, 'Closed' status, and the date '8/19/2024'. The 'Lines' tab is selected, showing a list of inspection lines. The first line is highlighted in blue and contains the date '8/19/2024' and the description 'FLOOR'. Below it, other lines are listed with dates and descriptions: '8/19/2024 Hay', '8/19/2024 Surface', '8/19/2024 WALLS', '8/19/2024 Cracks', and '8/19/2024 DOOR & WINDOWS'. A purple arrow points to the 'FLOOR' line, indicating the location where the hazard was added. The hazard description 'Falling on stairs, tripping, slipping' is visible next to the 'FLOOR' line.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>To view the attached image, select the line with the image and click on the attachment icon in the top right corner.</p> <p>The attachment form will open where the user can view the image.</p>	 <p>The screenshot shows the 'Attachments for Inspection journal' screen in the mobile app. The title bar at the top indicates 'Standard view' and 'Attachments for Inspection journal - Inspection journal: Insj-00000649, Inspect stable on farm south'. Below the title bar, there are tabs for 'General', 'Attachment', and 'Preview'. The 'General' tab is selected, showing a list of attachments with columns for 'Description', 'Type', and 'Attached'. The 'Attached' column has a toggle switch set to 'Yes'. Below the list, there is a 'Preview' section showing a photograph of a mechanical component.</p>

3.5 Viewing the ellipsis via the D365 Inspections 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 	