Axnosis

Demo script – Safety Permit Mobile App

Microsoft Dynamics 365 FO

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Foreword

A permit-to-work system is an integral part of a safe system of work and is used to ensure that work is done safely and efficiently. These are typically used in hazardous industries and involve procedures to request, review, authorise, document and most importantly, de-conflict tasks to be carried out by front line workers. Permit to work is an essential part of control of work, and the integrated management of maintenance processes. Control of work is made up of permit to work, hazard identification and risk assessment, with the necessary mitigation and control measures, including isolation management.

A permit-to-work is not simply permission to carry out a dangerous task but is an essential part of a system which determines how that task can be carried out safely and helps communicate this to those performing the task. The issue of a permit does not, by itself, make a task safe - that can only be achieved by those preparing for the work, those supervising the work and those performing the work.

A permit-to-work system is a formal recorded process used to control work which is identified as potentially hazardous. It is also a means of communication between site/installation management, plant supervisors and operators and those who carry out the hazardous work.

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Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY

Table 2: Change and Version History

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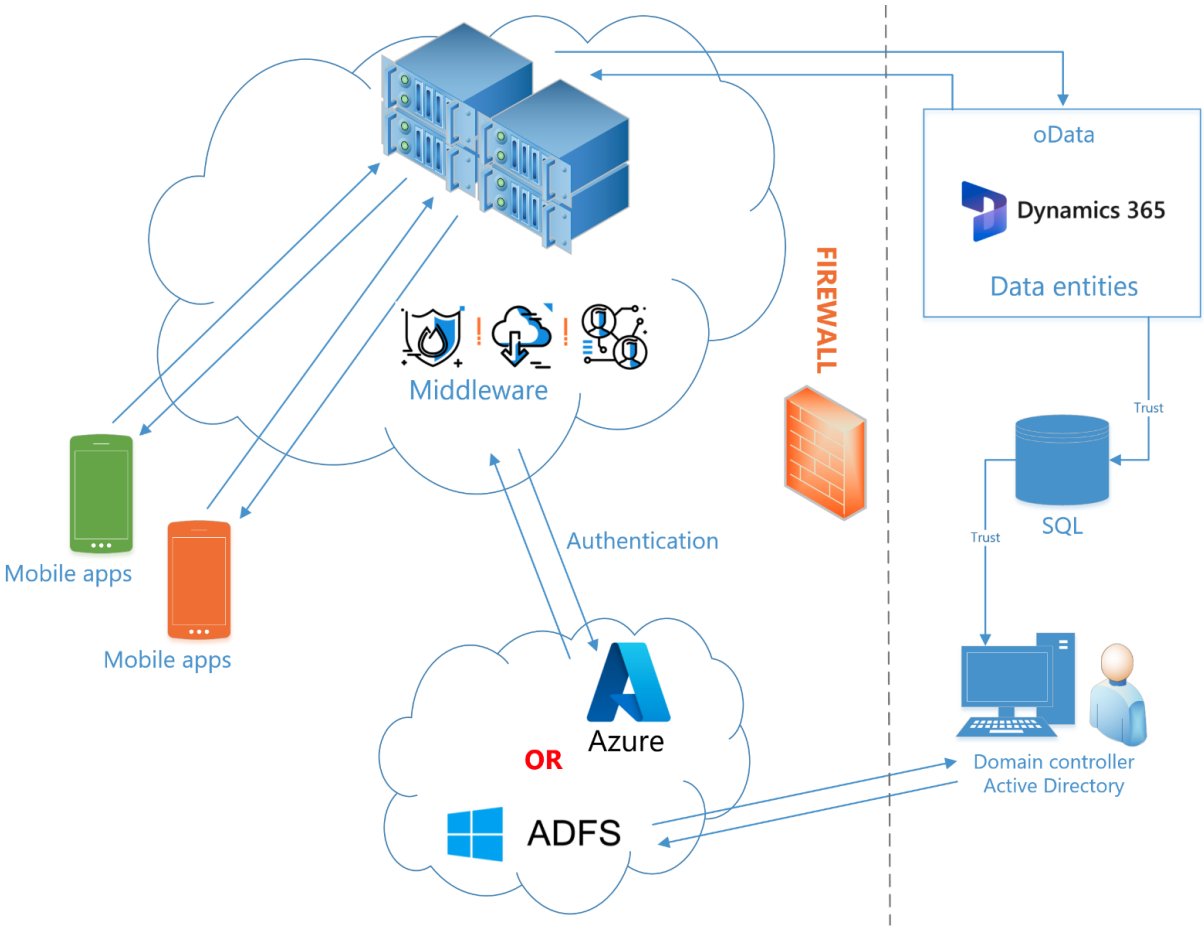
1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
    - HSE & GRC modules
- Axnosis middleware
- Ionic/Angular standalone applications
    - Safety permit mobile app



2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Permits to work mobile app.
- The apps support both platforms

- The apps can be downloaded from:
  - Android: Google Play store
  - iOS: AppStore or TestFlight

- The user must be registered in AAD and should be a registered user in D365 for Finance and Operations:
  - 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 security role restrictions and legal entity allocations on D365 for Finance and Operations should be considered and 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:
  - Current (old) app is 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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2.1 Background and Scenario

In construction, identifying safety risks is one of the most important things to do. This includes Hazard identification for key Work breakdown structure (WBS) lines in the construction plan. This is imperative to improve the safety of the workplace. These then should be translated into a formal Permit to work (P2W) or Authority to work.

Permit to work systems are formal procedures used to control activities that are considered high-risk. Permits only allow authorised personnel to perform those activities at specified times and in a way set out in the permit and referenced documents.

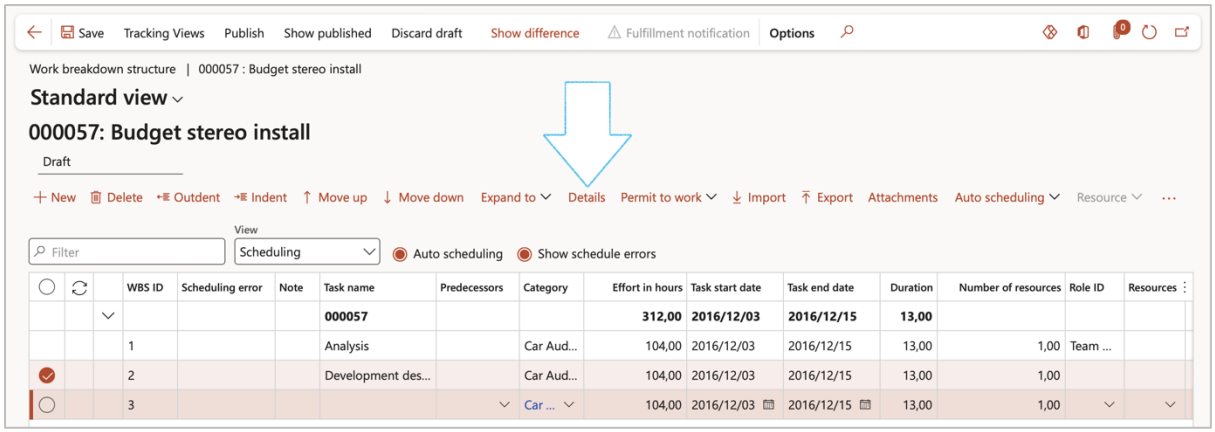
Permit to work systems do not in themselves make activities safer, this is only possible through the implementation of the correct procedures. It is important therefore that systems, not box-ticking exercises, are explained at site inductions and that they are continuously monitored, reviewed and kept up to date.

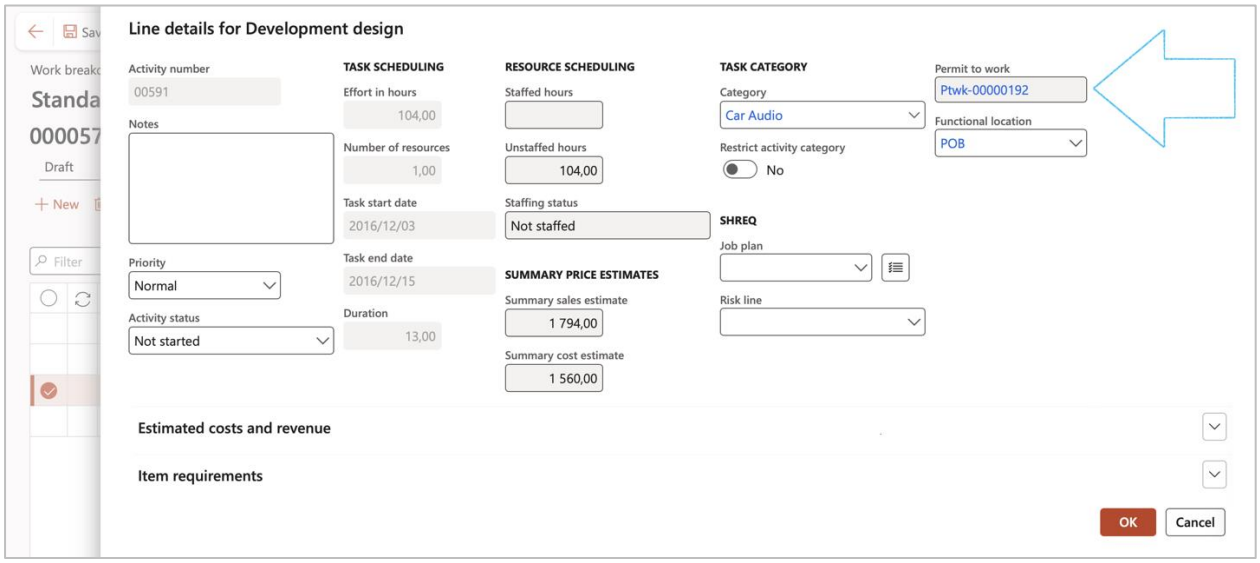
All of the above provides a compelling reason to have certain P2W functions available on a mobile app.

- It is assumed that D365 HSE and GRC modules are installed on D365.
- Projects and Permits sub modules are configured

Go to: **Project management and accounting > Projects > All projects**

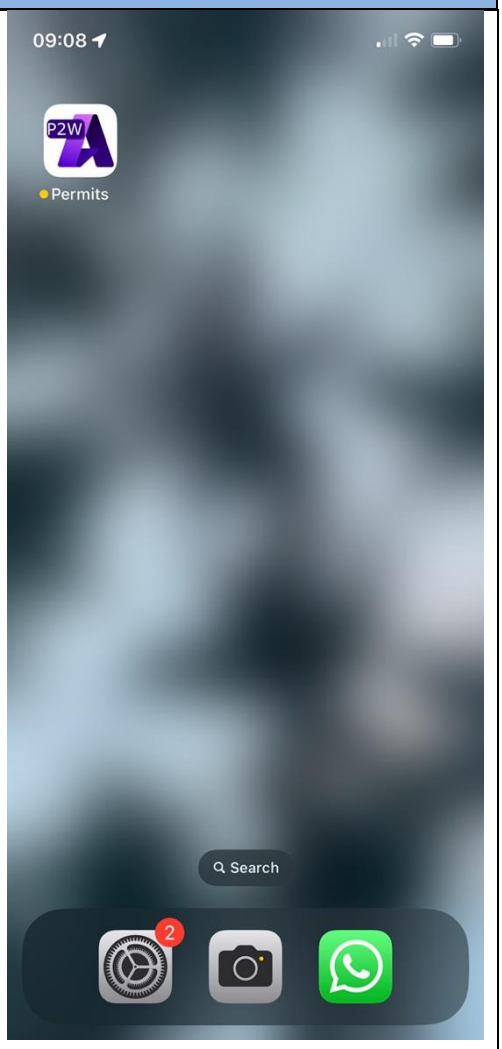
- On the **Action** pane, under the **Plan** tab, click on the **work breakdown structure** button in the **Activities** button group.

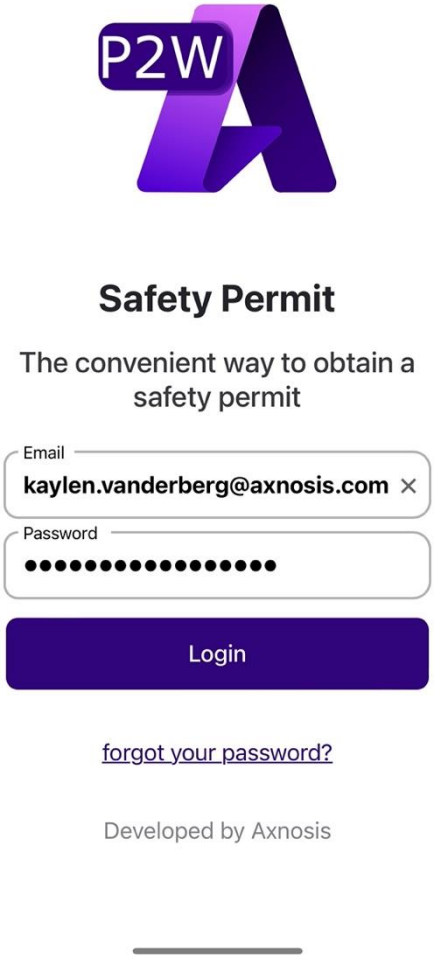



Line details for Development design
Activity number
00591
Notes
Priority
Normal
Activity status
Not started
TASK SCHEDULING
Effort in hours
104,00
Number of resources
1,00
Task start date
2016/12/03
Task end date
2016/12/15
Duration
13,00
RESOURCE SCHEDULING
Staffed hours
Unstaffed hours
104,00
Staffing status
Not staffed
SUMMARY PRICE ESTIMATES
Summary sales estimate
1 794,00
Summary cost estimate
1 560,00
TASK CATEGORY
Category
Car Audio
Restrict activity category
No
SHREQ
Job plan
Risk line
Permit to work
Ptwk-00000192
Functional location
POB
Estimated costs and revenue
Item requirements
OK
Cancel

3. Demo script

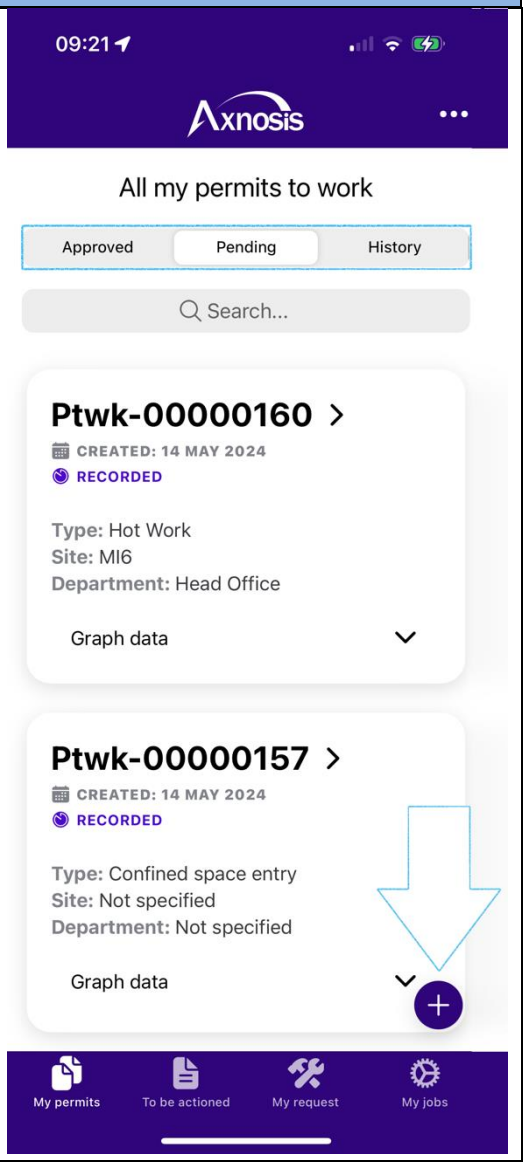
3.1 Log into the Permits app

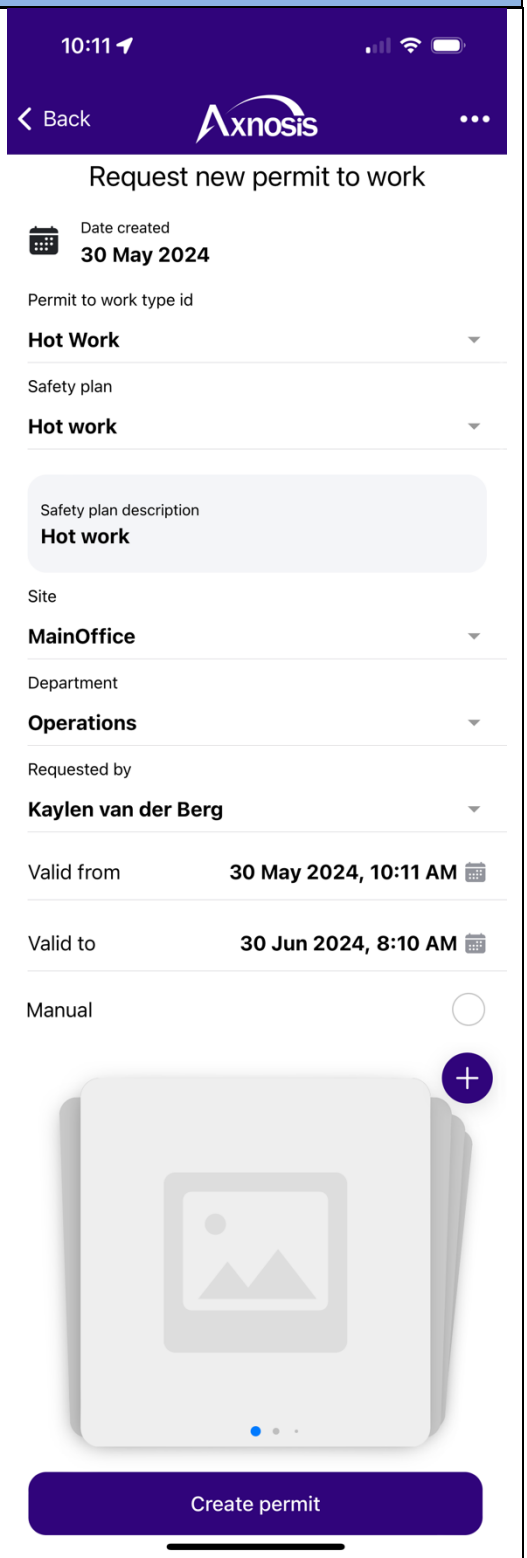
TALKING POINTS AND STEPS	MOBILE APP
The user takes out his/her mobile phone and taps on the **Permits** icon.	

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. The D365 URL is optional and will be removed in future releases of the apps Login as demo@axnosis.com.	

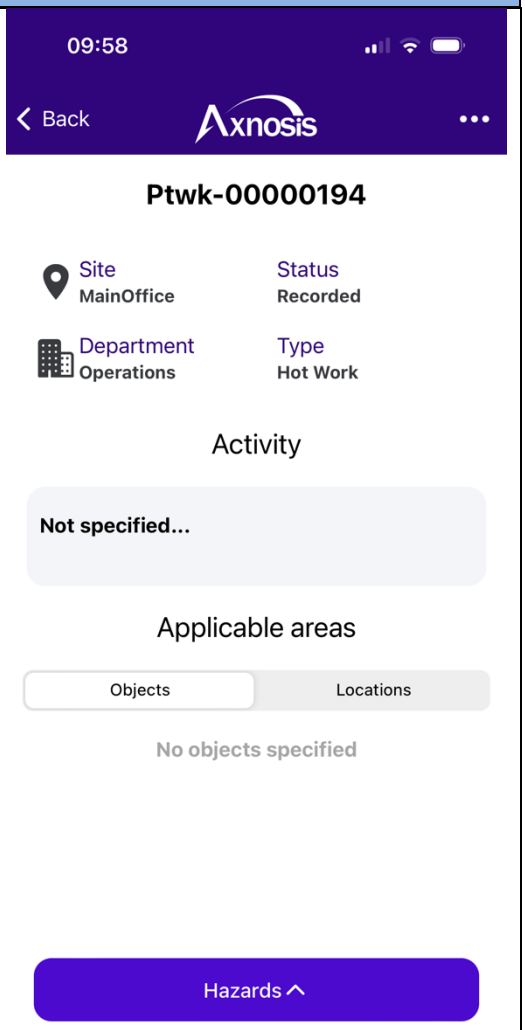
3.2 Requesting a new Permit via the D365 Permits mobile app

TALKING POINTS AND STEPS	MOBILE APP

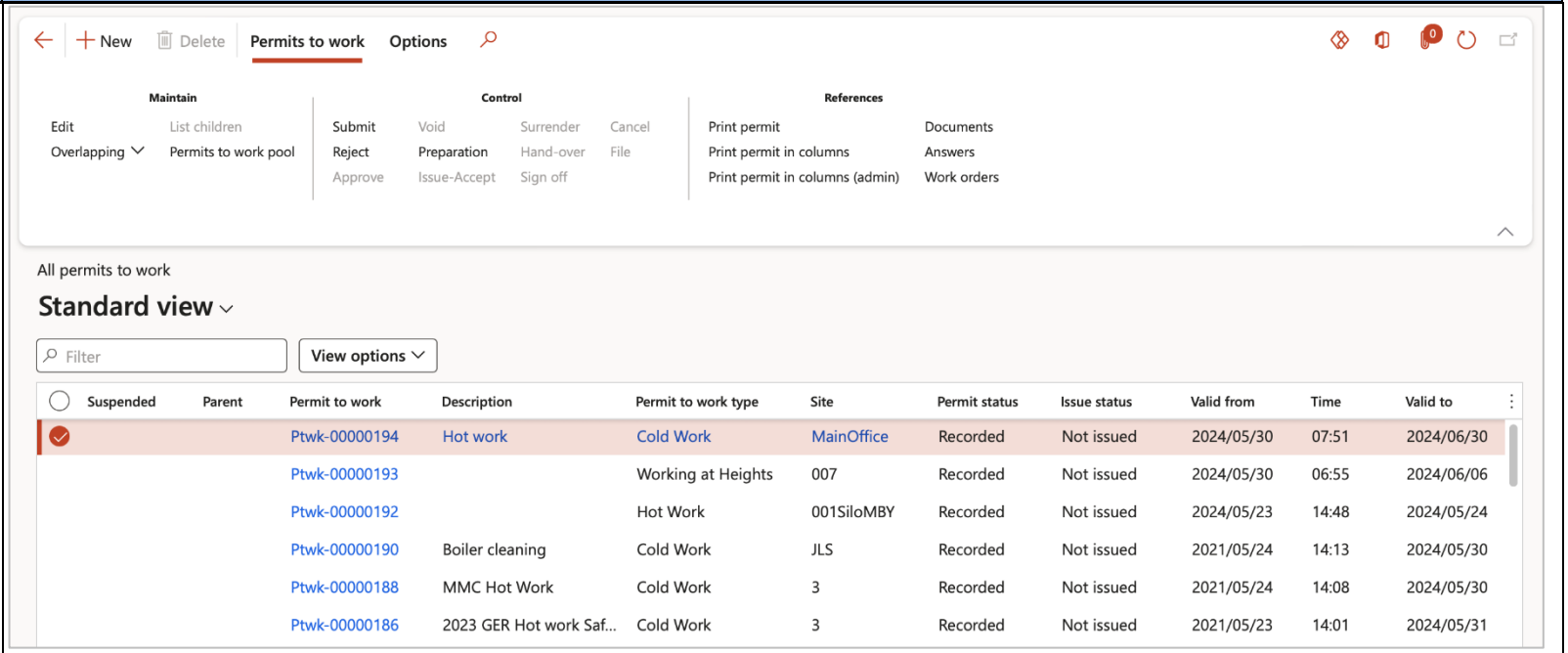
The **All permits to work** screen opens. The three tabs on this screen gives the user the option to view:
• **Approved** – All approved permits
• **Pending** - All permits pending approval with status:
  ○ Recorded
  ○ Submitted
• **History** – All rejected permits as well as permits that have expired
 	
These permits have been created via the **Permits app** as well as through D365.
 	
To request a new permit to work:
 	
The user taps on the **+** button at the bottom of the screen.
	

TALKING POINTS AND STEPS	MOBILE APP
The **Request new permit to work** screen opens and the user can enter the following information: • Select the **Permit to work type ID** • Select the relevant **Safety plan** from the list • Enter a brief **Safety plan description** • Select the relevant **Site** • Select the relevant **Department** • Select the name of the person who is requesting the permit in the **Requested by** field • Select the date and time **from** which the permit will be valid • Select the date and time **to** which the permit will be valid • If a **Manual** permit was issued from a printed book and you now want to create an electronic one, then flag the permit accordingly Tap on the **Create permit** button. (Red text will indicate that the field is mandatory for the request to be submitted)	

3.2.1 Viewing the permit details on the mobile device

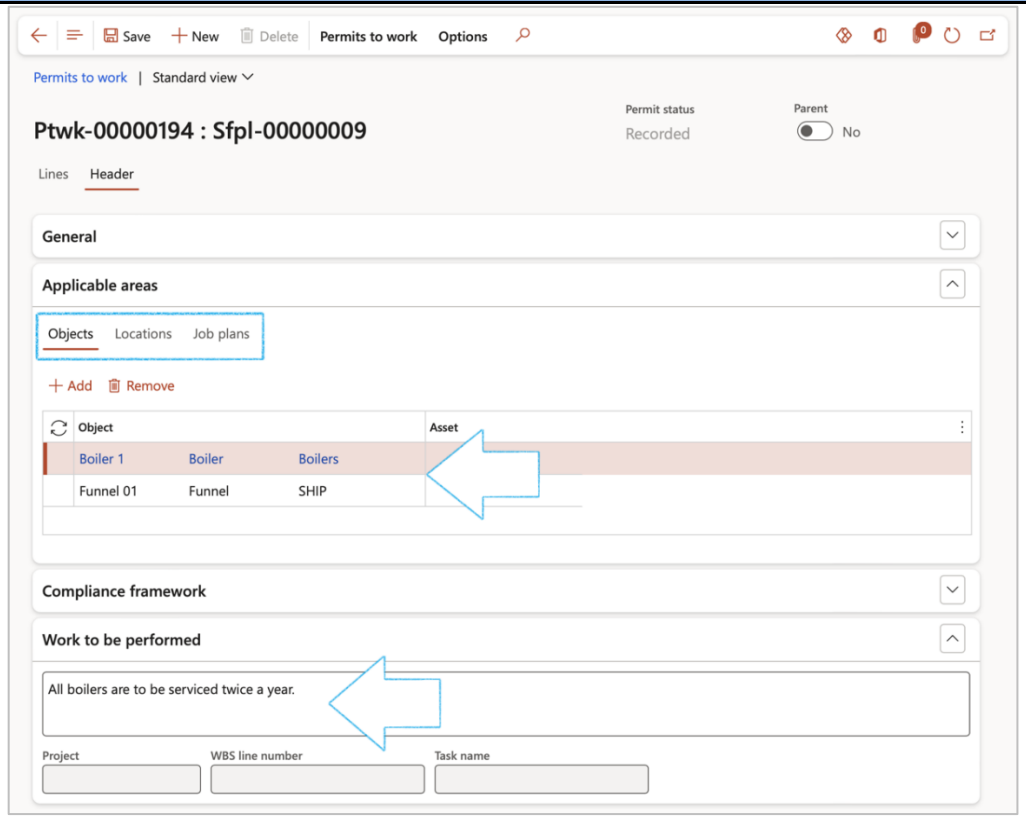
TALKING POINTS AND STEPS	MOBILE APP
The new permit will now be on the **All permits to work** screen under the **Pending** tab. Tap on the relevant permit to see the details. The **Activity**, **Applicable areas,** and **Hazards** are added via D365.	

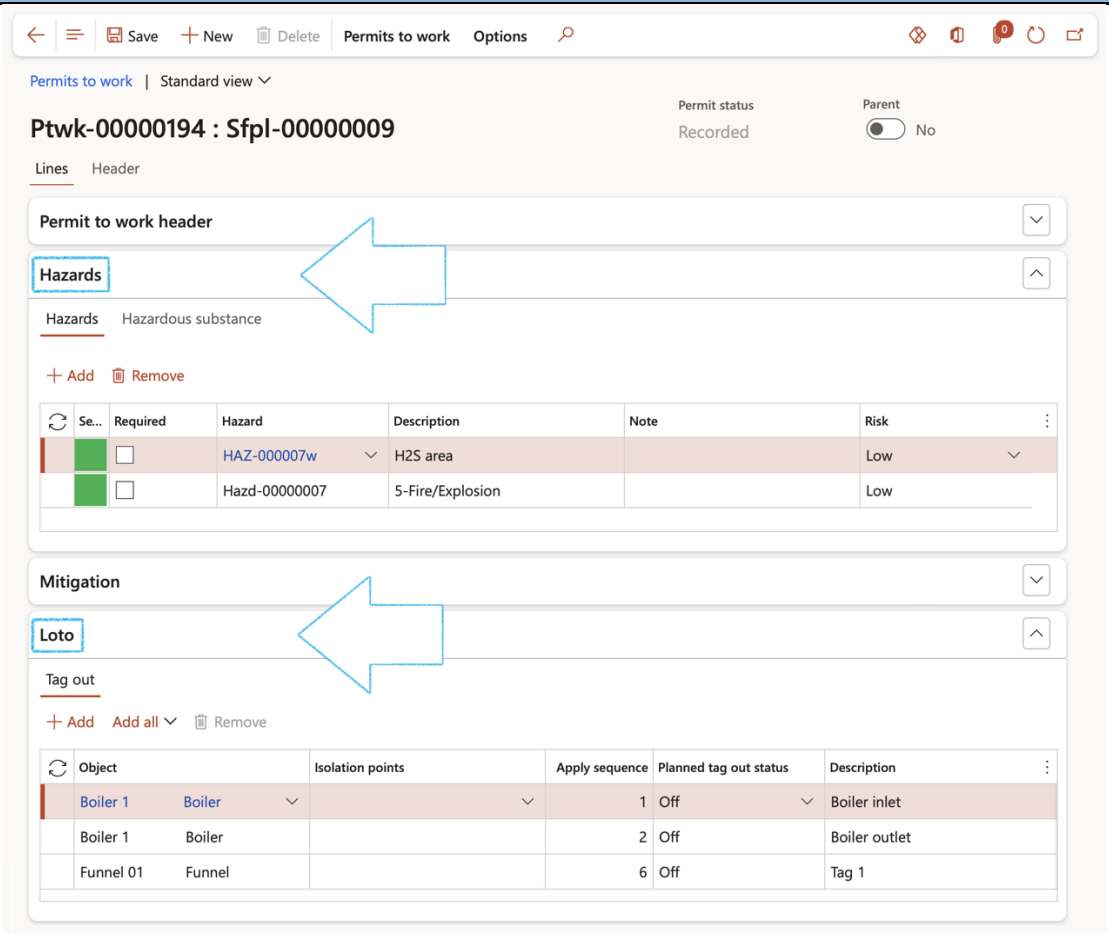
3.2.2 Viewing the “mobile created” Permit request inside D365

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
The mobile created permit request can be viewed inside D365 – log into D365 and navigate to the **HSE** module. The area page opens up and follow the path: **HSE > Permits to work > Permit to work list pages > All permits to work** Select the Permit that you want to add details to.	

3.2.3 Adding detail to the permit

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE

Open the **Header** view
 	
• Expand the **Applicable areas** Fast tab
• Enter the applicable areas under the relevant Index tab:
  ○ Objects
  ○ Locations
  ○ Job plans
• Expand the **Work to be performed** Fast tab
• Enter the activity details
	

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
Open the **Lines** view • Expand the **Hazards** Fast tab • Select the relevant Hazards To view the **Tag outs** that were added on the **Object**: • Expand the **Loto** Fast tab On the Action pane, in the Control group, click on the **Submit** button.	

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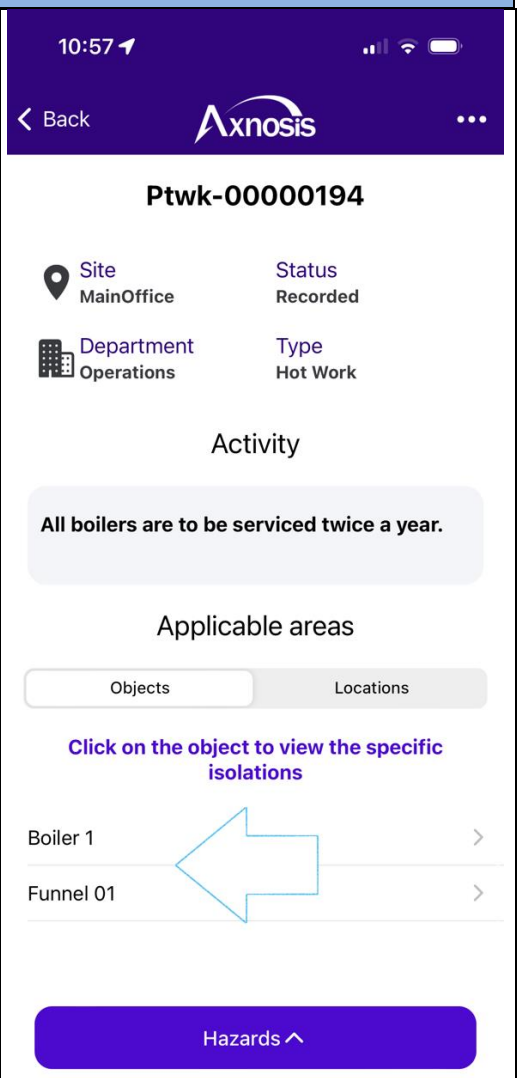
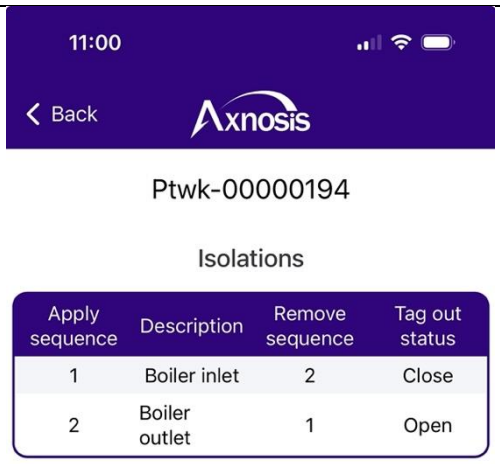
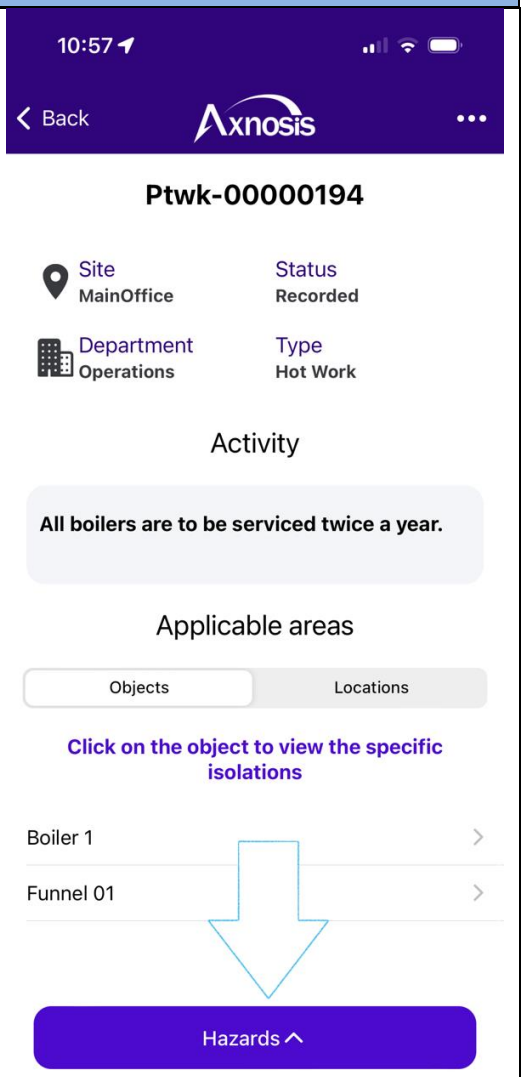
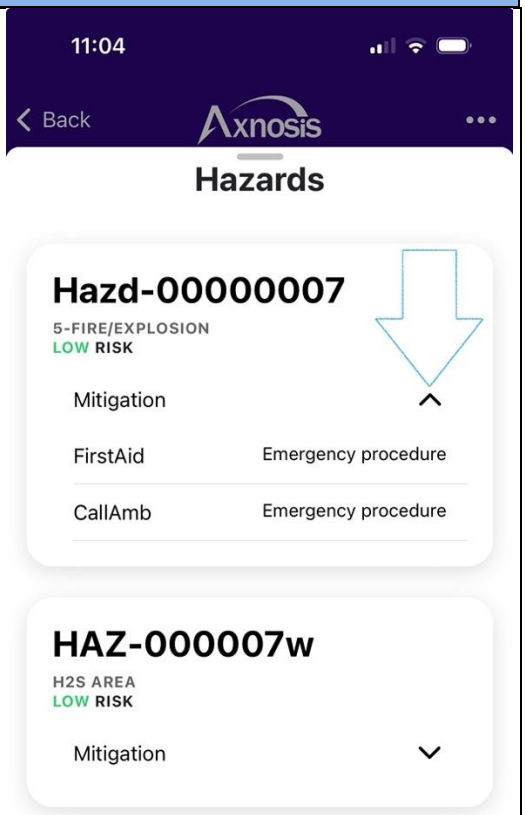
3.3 View added detail on the mobile device

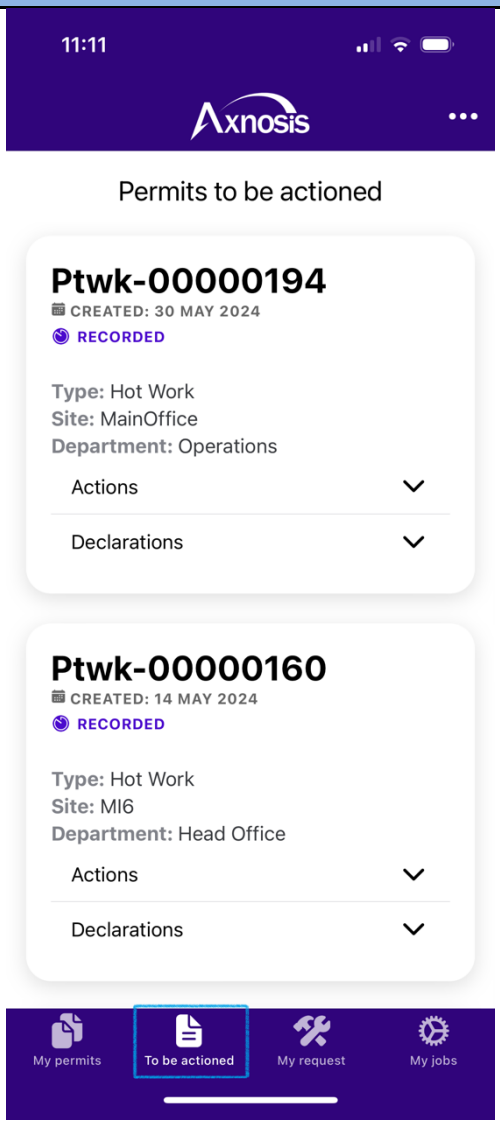
TALKING POINTS AND STEPS	MOBILE APP
On the **All permits to work** screen, tap on the relevant permit to view the added detail. The **Activity**, **Objects** (as well as the isolations/tag outs) and **Locations** that were added via D365, are now visible on the mobile device.	

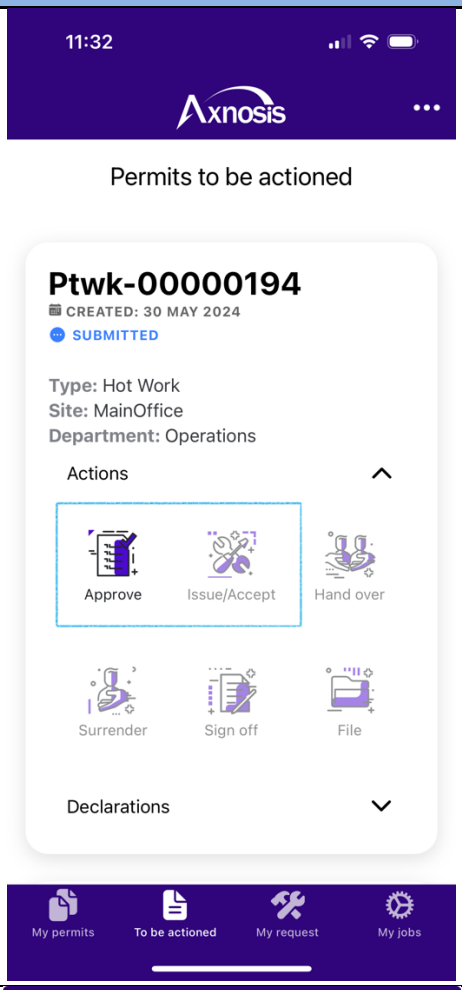
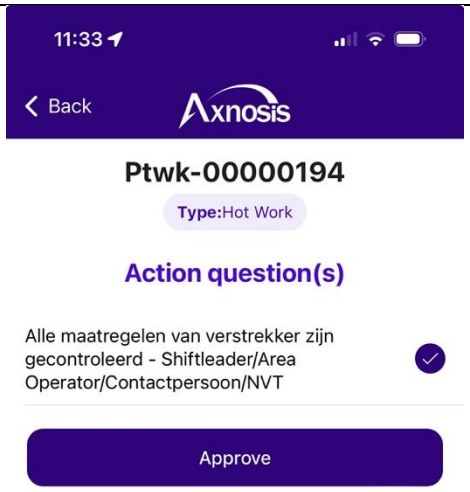
Tap on the object to view the specific isolations	

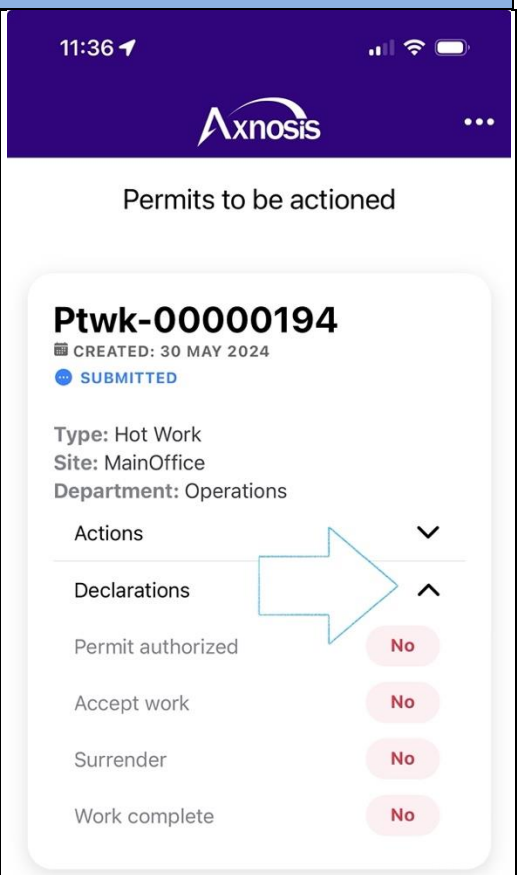
TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Hazards** button to view the Hazards that have been added.	

TALKING POINTS AND STEPS	MOBILE APP
On the **Hazards** screen, tap on the drop-down arrow to view the Mitigation for the selected hazard.	

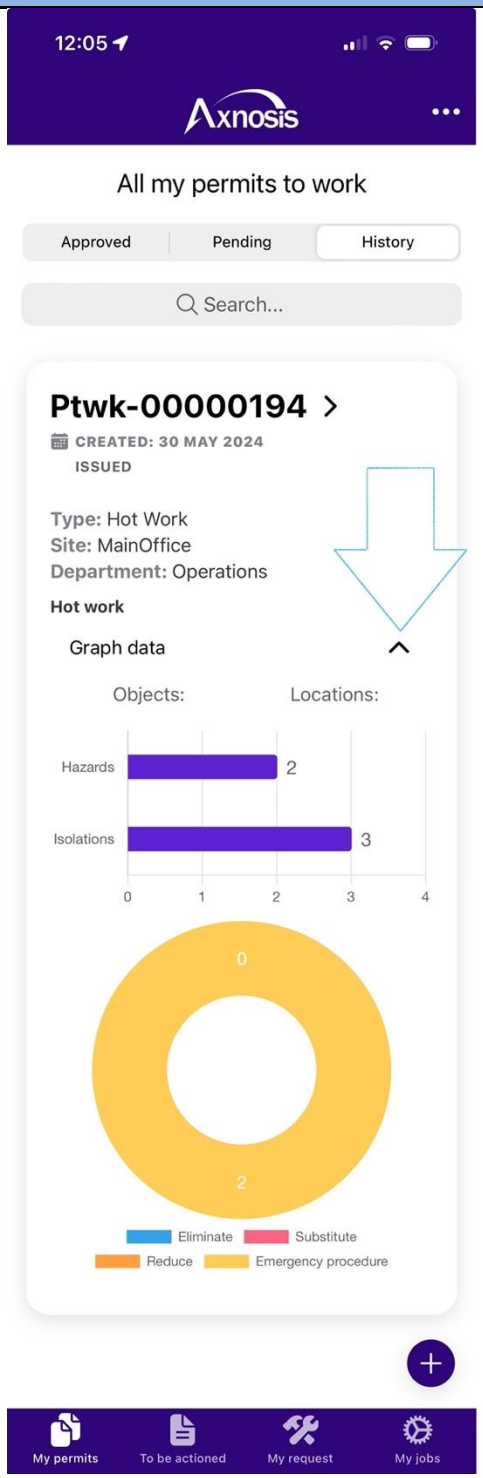
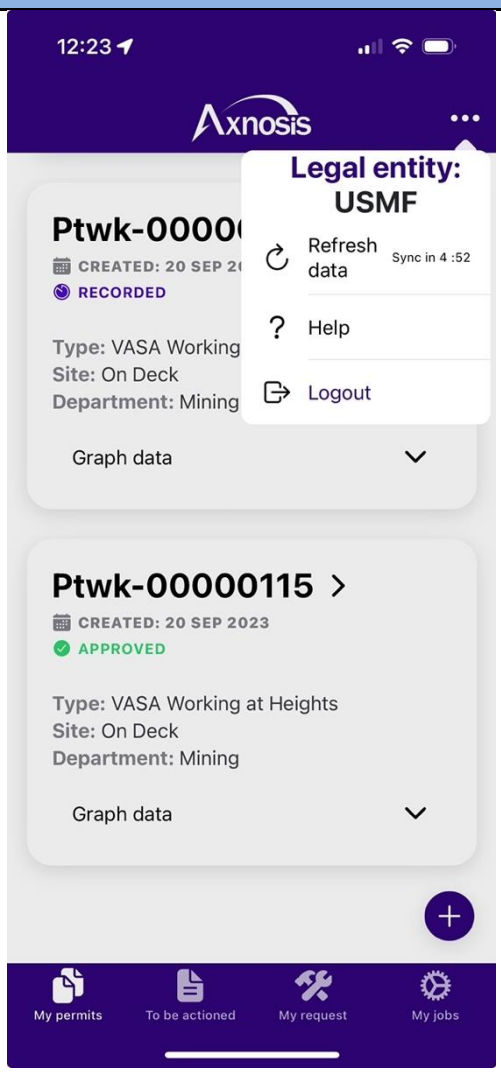
3.4 Action a permit on the mobile device

TALKING POINTS AND STEPS	MOBILE APP
On the **All permits to work** screen, tap on the **To be actioned** icon at the bottom of the screen.	

TALKING POINTS AND STEPS	MOBILE APP
On the relevant permit: Tap on the **Actions** drop-down arrow to select the relevant action To be able to approve a permit using the app, the record has to be submitted in D365. *Currently only the first two actions are supported on the mobile app: **Approve** and **Issue/accept**	
Answer the **Action questions** and tap on **Approve**	

TALKING POINTS AND STEPS	MOBILE APP
On the relevant permit: Tap on the **Declarations** drop-down arrow to view the progress of declarations based on the permit actions/controls (The same as in D365)	

3.5 Permit stats and graphs

TALKING POINTS AND STEPS	MOBILE APP
On the **All permits to work** screen, tap on **To be actioned** at the bottom of the screen. Tap on the drop-down arrow of the relevant permit, to view the **Graph data**. These include: • A count of the related hazards and isolations and a bar chart of the said values	

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**