



Safety Technology Challenge Innovation

Axnosis

Demo script – Planned Job observation Mobile App

Microsoft Dynamics 365 FO



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Foreword

Job observation in a workplace is used by managers to gain insights into employee performance. Without using this strategy some of the time, managers cannot be sure the data they get from other means accurately reflect each employee's performance. This strategy may also be used for other purposes, such as loss prevention, but is not relevant to every organization.

The purpose of a job observation is to identify and reinforce safe behaviours and eliminate unsafe behaviours. A safety observation should be performed by a supervisor or other trained employee. To have an effective proactive safety program, management must be committed to, and employees must participate in inspections and observations.

Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
TEST SCRIPTS – OHS 021 JOB OBSERVATIONS	21/10/2021	0.1	HENNIE VAN DEN BERG

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY

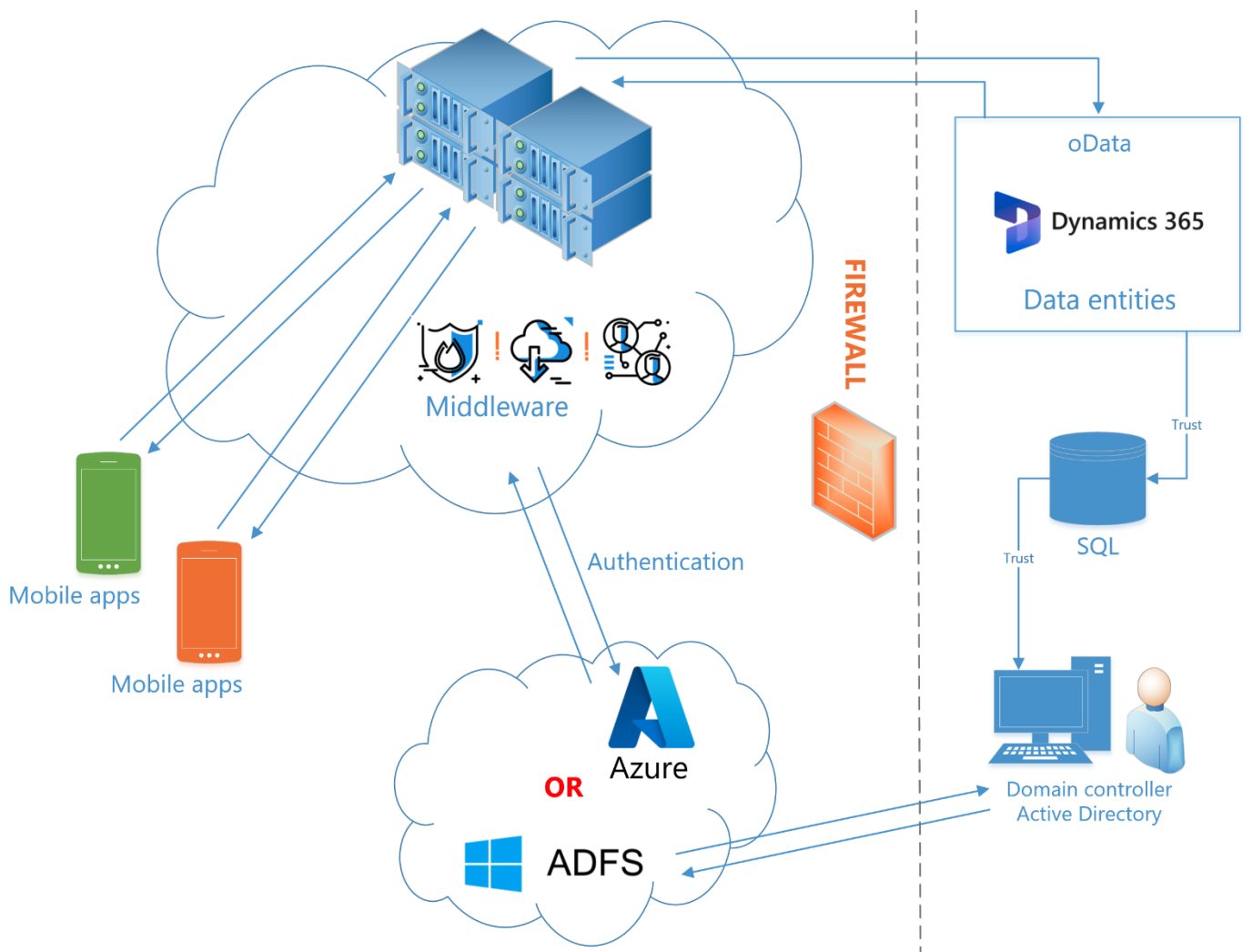
Table 2: Change and Version History

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1. Technology

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



2. Demo setup

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

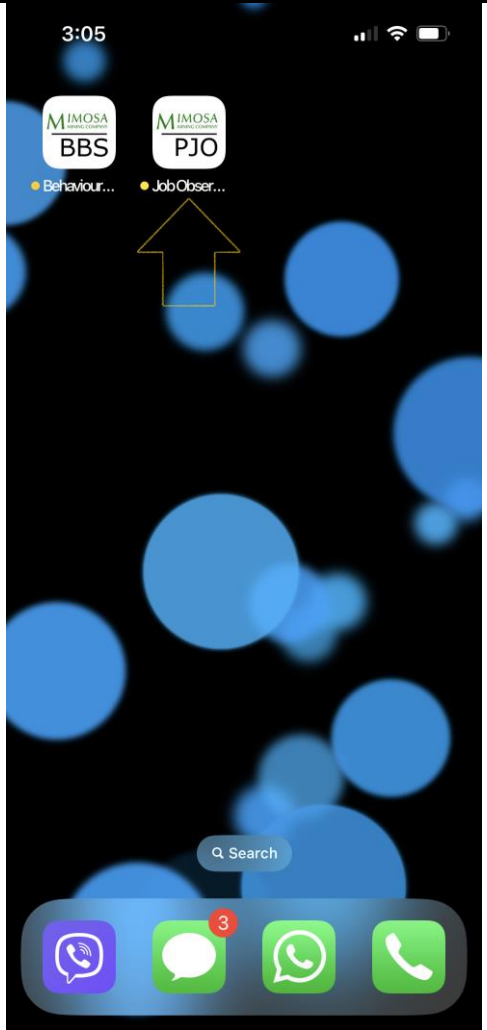
3.1 Demo background





- Organizations who implement a PJO program determine the appropriate list of behaviours to observe, based on the unique behaviours and risks of their organization. Safety professionals usually develop a checklist format that is easy and quick for observers to complete in the field and lists the target behaviours.
- Through this PJO mobile application, the recording of PJO inspections into D365 is easily done from any iOS or Android mobile device. Once inspections have been done, PJO administrators can evaluate and progress these records further within D365. Subsequently users can view changes to PJOs from their mobile devices.

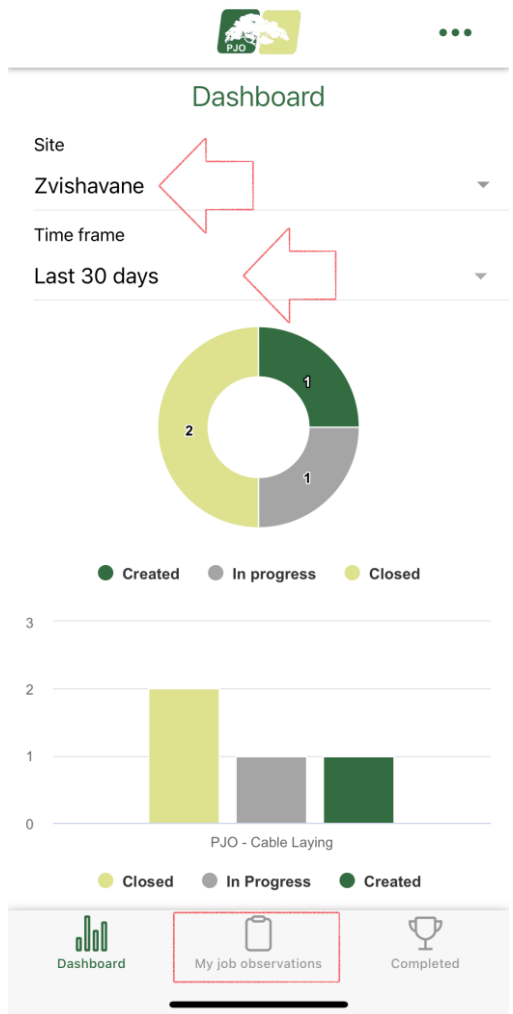
3.2 Demo Scenario

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

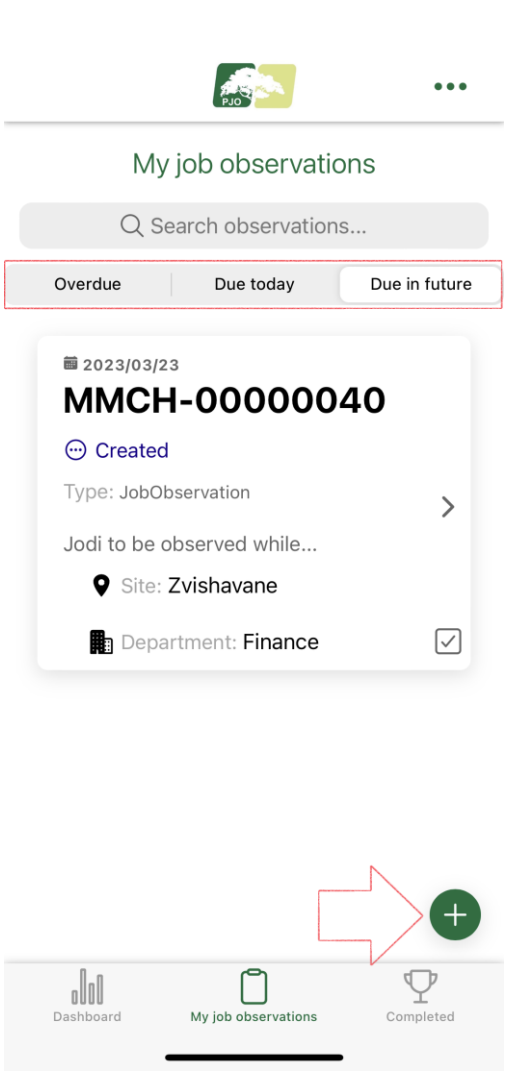
3.2.1 Recording a Job observation via the D365 PJO mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>Inspector:</p> <p>A user is ready to do a PJO observation on one of the truck drivers.</p> <p>The user takes out his/her mobile phone and taps on the Planned Job Observation (PJO) icon.</p>	

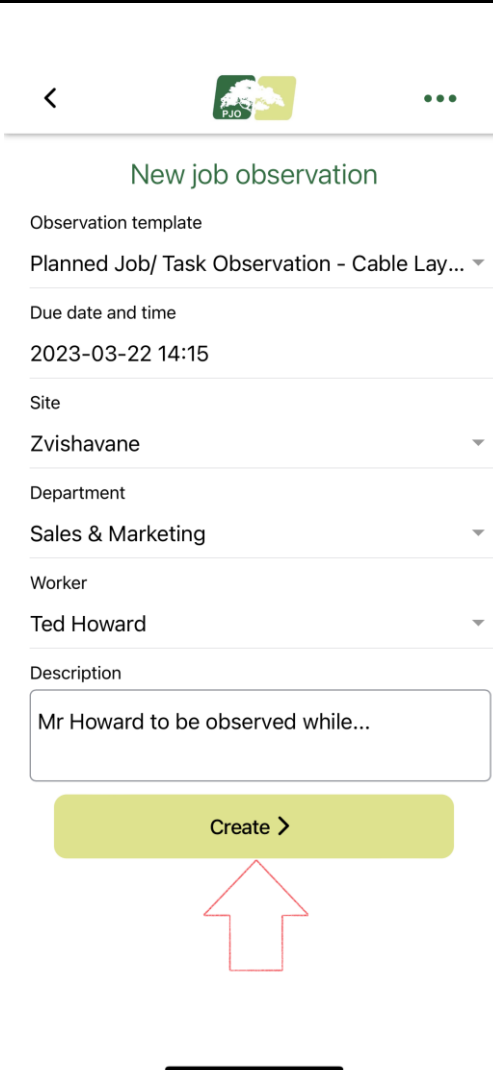
TALKING POINTS AND STEPS	MOBILE APP
<p>The logo on the login screen appears ...</p> <p>The user's D365 login details (Username and Password) are entered and used by the app for validation.</p> <p>The user then taps on the Login button to login to the app session.</p>	 <p>Planned Job Observations</p> <p>Verify competency & understanding of procedures and work processes while on the move.</p> <div>  noelene.cilliers@axnosis.com </div> <div>  </div> <div>  </div> <div> <div>Forgot</div> <div>Login</div> </div>

TALKING POINTS AND STEPS	MOBILE APP
<p>The Dashboard screen opens where the user can see an overview of all the PJO observations that have been captured via the PJO app and D365.</p> <p>The user can filter on the Site, to view specific planned job observations that have been done.</p> <p>There is also a Time frame filter to narrow down the search.</p> <p>The user taps on the My job observations button at the bottom of the screen.</p>	 <p>The screenshot displays the mobile app's dashboard. At the top, there's a header with the PJO logo and a menu icon. Below the header, the title 'Dashboard' is centered. Two filter sections are present: 'Site' with a dropdown menu showing 'Zvishavane' and 'Time frame' with a dropdown menu showing 'Last 30 days'. A donut chart follows, showing the status distribution: 2 Closed (yellow), 1 In progress (grey), and 1 Created (green). Below the donut chart is a bar chart for 'PJO - Cable Laying' with the same color-coded bars. At the bottom, a navigation bar contains three icons: a bar chart for 'Dashboard', a clipboard for 'My job observations' (which is highlighted with a red box), and a trophy for 'Completed'.</p>

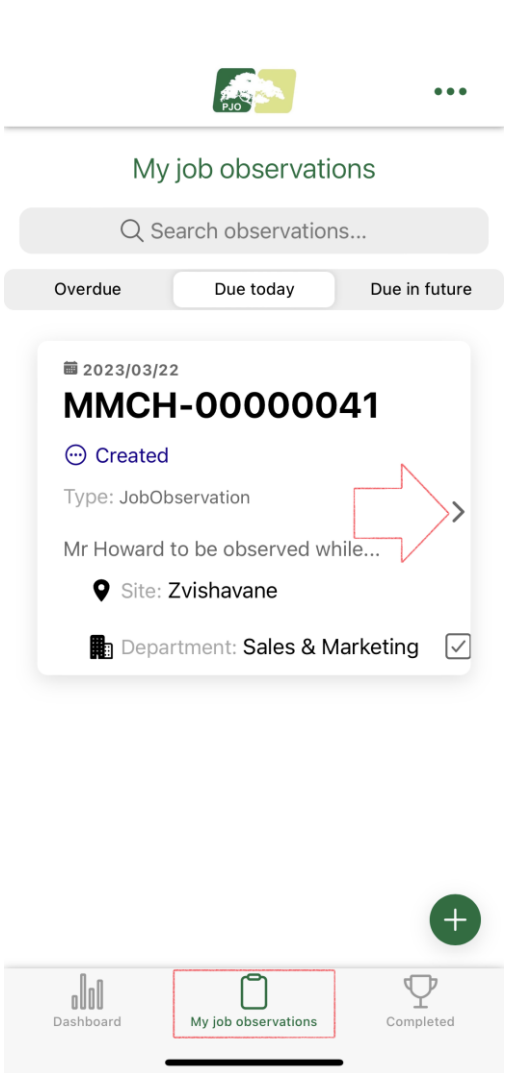
3.2.2 Viewing the PJO inspection details via the D365 Inspections mobile app

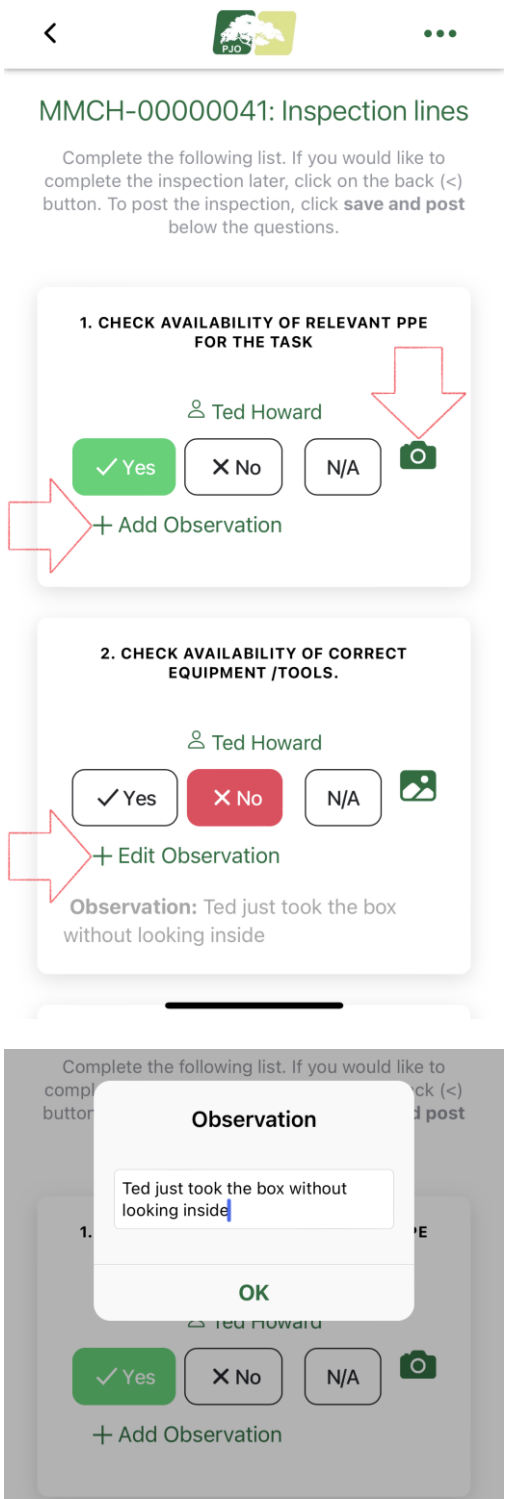
TALKING POINTS AND STEPS	MOBILE APP
<p>The My job observations screen will open. The user can choose to see:</p> <ul style="list-style-type: none"> • All overdue observations • All observations due today • All observations due in the future <p>To create a new PJO inspection, tap on the +plus button.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

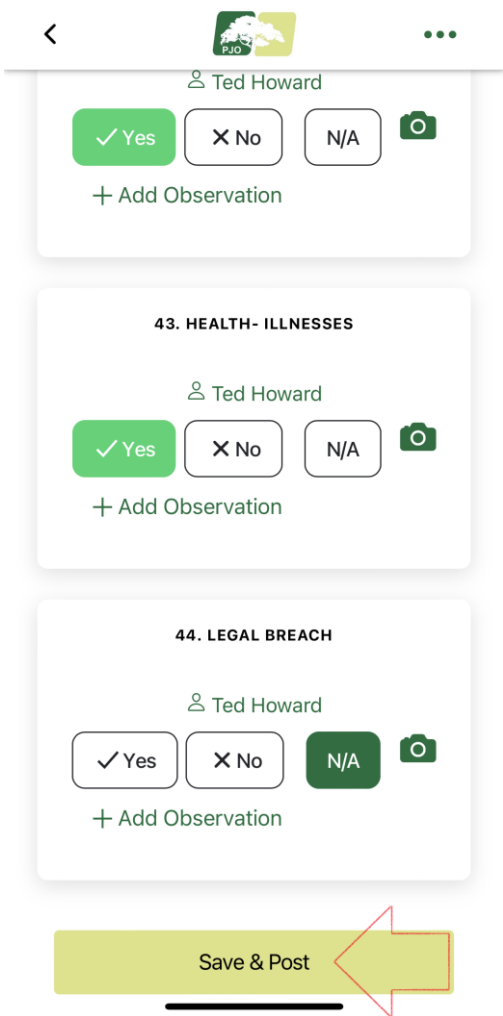
3.2.3 Create a new PJO inspection via the D365 PJO mobile app

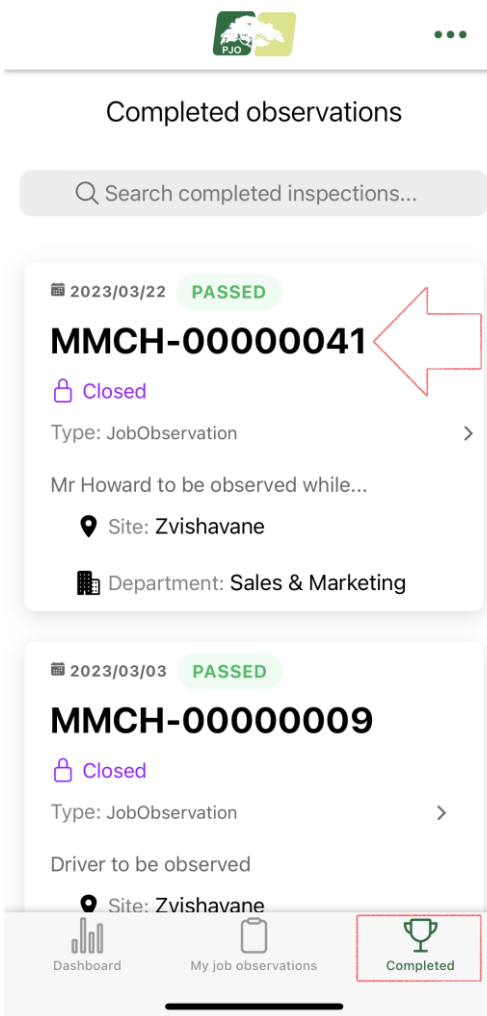
TALKING POINTS AND STEPS	MOBILE APP
<p>The New job observation screen opens, and the user can enter the following information:</p> <ul style="list-style-type: none"> • Select the relevant Observation template from the dropdown list • Select the Due date and time for the observation • Select the Site where the observation is to be done • Select the relevant Department from the dropdown list • Select the Worker that is going to be observed • Enter a brief Description <p>Tap on the Create button.</p>	

3.2.4 Performing an observation via the D365 PJO mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>To perform an observation:</p> <ul style="list-style-type: none"> On the My job observations screen, scroll to find the relevant observation Tap on the arrow to open the inspection lines screen 	

TALKING POINTS AND STEPS	MOBILE APP
<p>On the Inspection Lines screen the user can go through each inspection line, indicating whether the person being observed complies (Yes), does not comply (No), or mark not applicable (NA) if the line is not applicable to the specific job that is being observed.</p> <p>An observation can be added to each of the lines by tapping on the + Add Observation button.</p> <p>(The observation can be edited after it has been entered, but not after the inspection has been posted)</p> <p>Tap on the camera icon to take a picture as evidence of the observation.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>Once all the observations have been entered, the user taps on the Save & Post button at the bottom of the screen.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>The completed PJO can now be viewed on the Completed observations screen.</p>	



3.3 Viewing the “mobile created” PJO inspection inside D365

TALKING POINTS AND STEPS	DYNAMICS OHS 365 MODULE																																																																													
<p>Inspector:</p> <p>The mobile created PJO inspection can be viewed inside D365 – log into D365 and navigate to the HSE module.</p> <p>Go to:</p> <p>HSE>Inspections>PJO Inspection journals</p> <p>Click on the Inspection that you want to see the details of.</p>	<div><div>Save + New Delete Inspection journal Options</div><div><div>Job observation journals</div><div>Standard view</div><div><div>Filter</div><div>Show All</div><div>My inspections No</div></div><table><thead><tr><th></th><th>Inspection journal</th><th>Journal name</th><th>Inspector</th><th>Type</th><th>Line count</th><th>Inspection date</th><th>Yes/No</th><th>Site</th><th>Department</th><th>Pass-Fail</th></tr></thead><tbody><tr><td></td><td>MMCH-00000040</td><td>PJO - Cable Laying</td><td>Noelene Cilliers</td><td>Job observation</td><td>44</td><td>3/22/2023</td><td><input checked="" type="checkbox"/></td><td>Zvishavane</td><td>Finance</td><td></td></tr><tr><td></td><td>MMCH-00000041</td><td>PJO - Cable Laying</td><td>Noelene Cilliers</td><td>Job observation</td><td>44</td><td>3/22/2023</td><td><input checked="" type="checkbox"/></td><td>Zvishavane</td><td>Sales & Marketing</td><td>Pass</td></tr><tr><td></td><td>MMCH-00000015</td><td>PJO - Cable Laying</td><td>Hennie van den Berg</td><td>Job observation</td><td>44</td><td>3/9/2023</td><td><input checked="" type="checkbox"/></td><td>Zvishavane</td><td>IT Department</td><td></td></tr><tr><td></td><td>MMCH-00000010</td><td>PJO - Cable Laying</td><td>Hennie van den Berg</td><td>Job observation</td><td>44</td><td>3/7/2023</td><td><input checked="" type="checkbox"/></td><td>Zvishavane</td><td></td><td></td></tr><tr><td></td><td>MMCH-00000009</td><td>PJO - Cable Laying</td><td>Noelene Cilliers</td><td>Job observation</td><td>44</td><td>3/3/2023</td><td><input checked="" type="checkbox"/></td><td>Zvishavane</td><td>Operations</td><td>Pass</td></tr><tr><td></td><td>MMCH-00000008</td><td>PJO - Cable Laying</td><td>Hennie van den Berg</td><td>Job observation</td><td>44</td><td>3/2/2023</td><td><input checked="" type="checkbox"/></td><td>Zvishavane</td><td></td><td>Pass</td></tr></tbody></table></div></div>		Inspection journal	Journal name	Inspector	Type	Line count	Inspection date	Yes/No	Site	Department	Pass-Fail		MMCH-00000040	PJO - Cable Laying	Noelene Cilliers	Job observation	44	3/22/2023	<input checked="" type="checkbox"/>	Zvishavane	Finance			MMCH-00000041	PJO - Cable Laying	Noelene Cilliers	Job observation	44	3/22/2023	<input checked="" type="checkbox"/>	Zvishavane	Sales & Marketing	Pass		MMCH-00000015	PJO - Cable Laying	Hennie van den Berg	Job observation	44	3/9/2023	<input checked="" type="checkbox"/>	Zvishavane	IT Department			MMCH-00000010	PJO - Cable Laying	Hennie van den Berg	Job observation	44	3/7/2023	<input checked="" type="checkbox"/>	Zvishavane				MMCH-00000009	PJO - Cable Laying	Noelene Cilliers	Job observation	44	3/3/2023	<input checked="" type="checkbox"/>	Zvishavane	Operations	Pass		MMCH-00000008	PJO - Cable Laying	Hennie van den Berg	Job observation	44	3/2/2023	<input checked="" type="checkbox"/>	Zvishavane		Pass
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Demo script – Planned Job observation Mobile App draft

Microsoft Dynamics 365 FO

TALKING POINTS AND STEPS	MOBILE APP
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Demo script – Planned Job observation Mobile App draft

Microsoft Dynamics 365 FO

The PJO inspection journal detail page will open.

Open the **Lines** view to see the details

Save + New Delete Inspection journal Options

Job observation journals | Standard view

MMCH-00000041 : Mr Howard to be observed while... ✓ Closed 3/22/2023

Lines Header

Inspection journal

Lines

+ Add Remove Up Down Show/hide

	Inspection date	Description	(*)	Ted Howard
	3/22/2023	Special checks prior to Task/Job Observation		
	3/22/2023	Check availability of relevant PPE for the task		Yes
✓	3/22/2023	Check availability of correct equipment /tools.		No
	3/22/2023	Check whether the equipment/tools are in good working order		Yes
	3/22/2023	Check & ensure that the employee/contractor is not drunk		Yes

Line details

General Activity

IDENTIFICATION

Note

Comments/Observations

Ted just took the box without looking inside

Description

Check availability of correct equ...

Inspection journal

MMCH-00000041

Inspection date

3/22/2023

Inspection sheet name

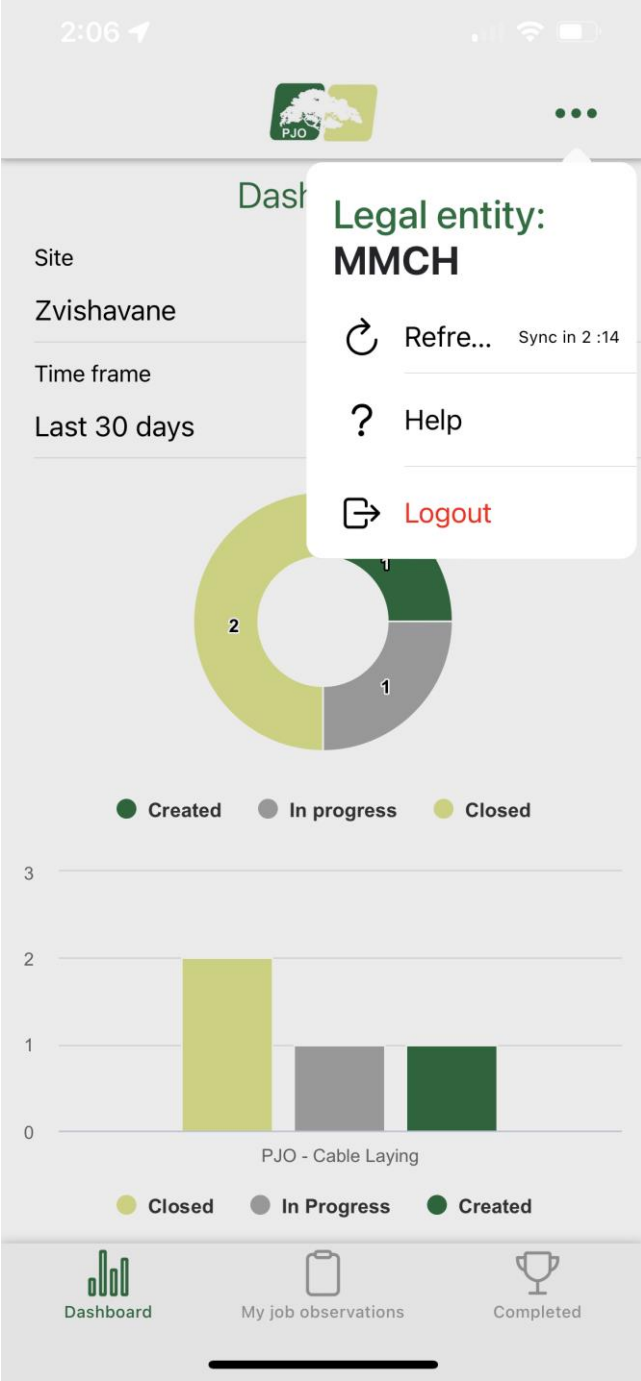
Mr Howard to be observed whil...

LINE

Line number

3.0000000000

3.4 The ellipsis on the D365 PJO 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 	 <p>The screenshot shows the mobile app interface. At the top, the status bar displays the time 2:06 and signal indicators. Below the status bar is the app header with the PJO logo and a three-dot ellipsis menu. The main content area displays the 'Dashboard' for the 'Zvishavane' site, showing a 'Time frame' of 'Last 30 days'. A donut chart displays the status of tasks: 2 Closed (green), 1 In progress (grey), and 1 Created (dark green). Below the donut chart is a bar chart for 'PJO - Cable Laying' showing 2 Closed, 1 In Progress, and 1 Created. The bottom navigation bar includes icons for 'Dashboard', 'My job observations', and 'Completed'. The ellipsis menu is open, showing the 'Legal entity: MMCH', a 'Refresh data' button with a circular arrow icon and 'Sync in 2 :14', a 'Help' button with a question mark icon, and a 'Logout' button with a door icon.</p>