

# Imperium Job Hazard Analysis

User Guide Manual



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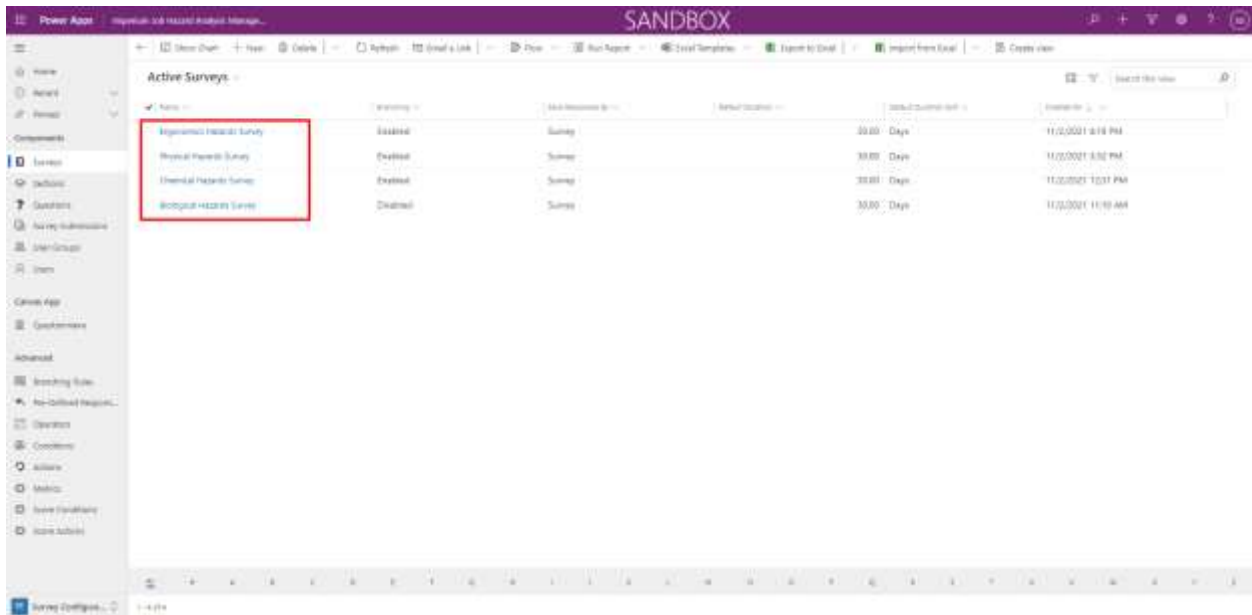
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## Imperium JHA Documentation

The Job Hazard Analysis comes with an end-to-end solution based on the Occupational Safety and Health Administration (OSHA) standards. The module consists of multiple Surveys, with industry specific questions to review Job Hazards at a workplace. It also includes a dynamic survey wizard that creates industry-specific surveys tailored to job categories, following OSHA templates to calculate risk scores. The workflow encompasses dynamic pre and post-risk survey creation, survey assignment and submission, review by authorized personnel, and insights based on responses. Additionally, the JHA App features dashboards that collect and visually represent all survey submissions, offering a comprehensive view of user responses, identified hazards, and calculated risk scores, ensuring thorough hazard assessment and management for a safer workplace.

The Job Hazards Analysis Solution has Surveys of the following categories.

- **Biological Hazards Survey:** The survey has various questions to get exposure of biological hazards associated with the worker's job-roles. The survey validates any health hazards involved in working with natural elements, organic materials, for workplaces such as hospitals, botany labs, zoology labs, pharmaceutical factories (pharmacologists), medical equipment manufacturing places etc.
- **Chemical Hazards Survey:** The survey consists of questions to determine the chemicals-based risk factors to human health, and the severity of hazards. The survey can be assigned to workers belonging to chemical industries, petrochemical factories, and to people working as chemical engineers, forensic scientists, hazardous waste chemists, pharmacologists etc.
- **Ergonomics Hazards Survey:** The survey is primarily configured to gain insights of the workplace, as the responses show the likelihood of causing any injury or strain to the workers. The survey is an appropriate fit for factory workers, on-field engineers, firefighters, garage workers, as well as in-house office employees.
- **Physical Hazards Survey:** The survey conducts analysis of the workplace, and any hazardous elements that could be a threat to the physical health of employees. The survey is an appropriate fit for factory workers, on-field engineers, firefighters, garage workers, as well as in-house office employees.

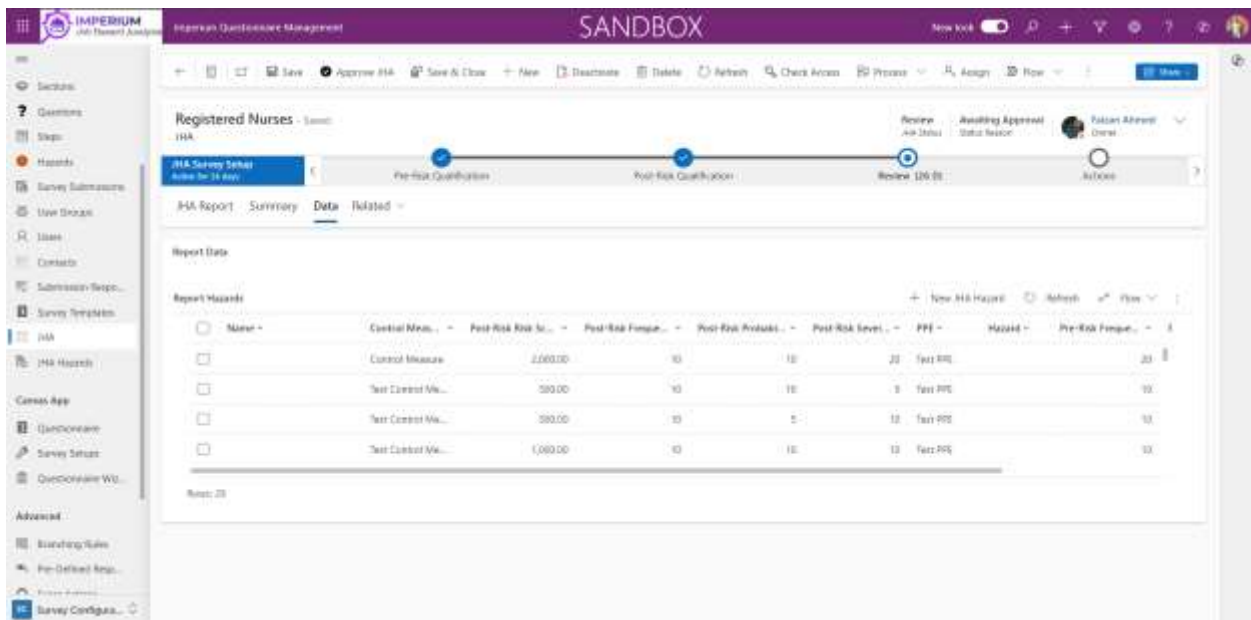


The solution is based on Model-driven Application, Canvas Application and Power Pages Portal. The Model-driven application is the Admin Panel to configure Surveys, add steps and hazards. The end-user attempts the Survey on either Canvas Application or the portal, while each response and score submitted is stored in the Model Driven Application. Where Admin can navigate individual users' profiles and view the submissions and consequent actionable insights in the form of a Power BI report. Admin or the end users can create their own surveys on the Canvas App wizard as well.

# JHA Flow Configuration

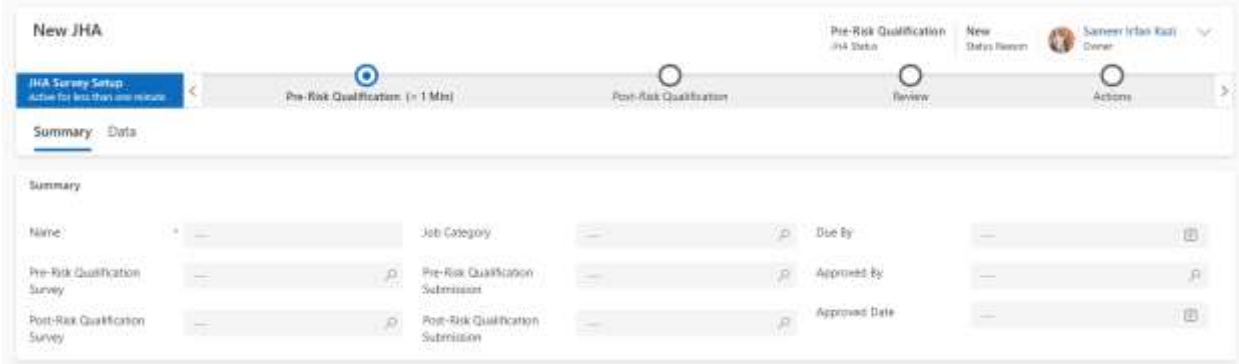
Imperium Job Hazard Analysis solution enables Admin to initiate a BPF to track the entire roadmap from survey creation to generating actionable insights based on the responses. The steps in the JHA Business Process Flow include:

- Pre-Risk Qualification: The survey generation and assignment stage.
- Post-Risk Qualification: Once the pre-risk survey is assigned the flow moves to this stage for post risk survey updating and assignment.
- Review: This stage involves approval by the relevant personnel.
- Actions: The stage where all actions submitted in survey responses are noted and consequent tasks and activities are created.



The JHA main form has the following fields under the Summary tab:

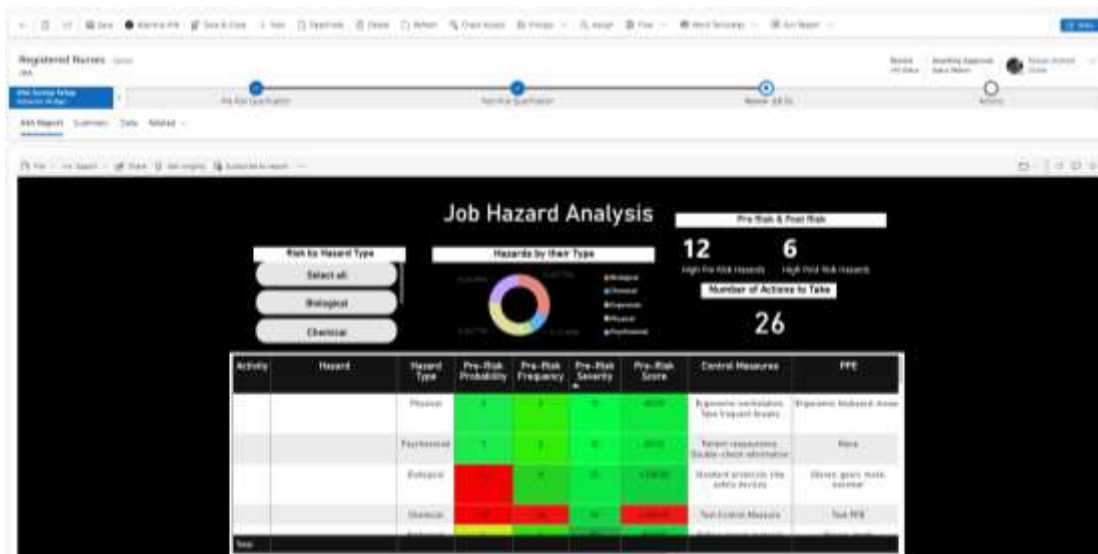
- Name: Enter a name for the JHA record.
- Job Category: Auto-populated from the wizard.
- Pre-Risk Qualification Survey: Auto-populated from the wizard.
- Post-Risk Qualification Survey: Auto-created and auto-populated from the wizard.
- Pre-Risk Qualification Submission: Auto-populated by the latest submission for the survey.
- Post-Risk Qualification Submission: Auto-populated by the latest submission for the survey.
- Due By: Enter the Due date for the survey.
- Approved By: Auto-populated when JHA status is changed.
- Approved Date: Auto-populated when JHA status is changed.



The JHA Business Process Flow has two statuses on display to keep track of the progress:

- JHA Status: Choose from the available statuses as the Business Process Flow progresses in stages. The statuses include:
  - Pre-Risk Qualification
  - Post-Risk Qualification
  - Review
  - Approved
  - Expired
- Status Reason: Choose from the available statuses as the Business Process Flow progresses in stages. The statuses include:
  - New
  - Survey Created
  - Pre-Risk Assigned
  - Pre-Risk Complete
  - Post-Risk Assigned
  - Awaiting Approval
  - Expired

As the JHA Business Process flow progresses, relevant scores and data can be viewed under the Data tab. The JHA Report tab also shows the analytical data graphically in a Power BI Report



# Survey Configuration

Imperium Job Hazard Analysis solution enables Admin to configure new surveys, edit existing survey questions, or add new questions or response options.

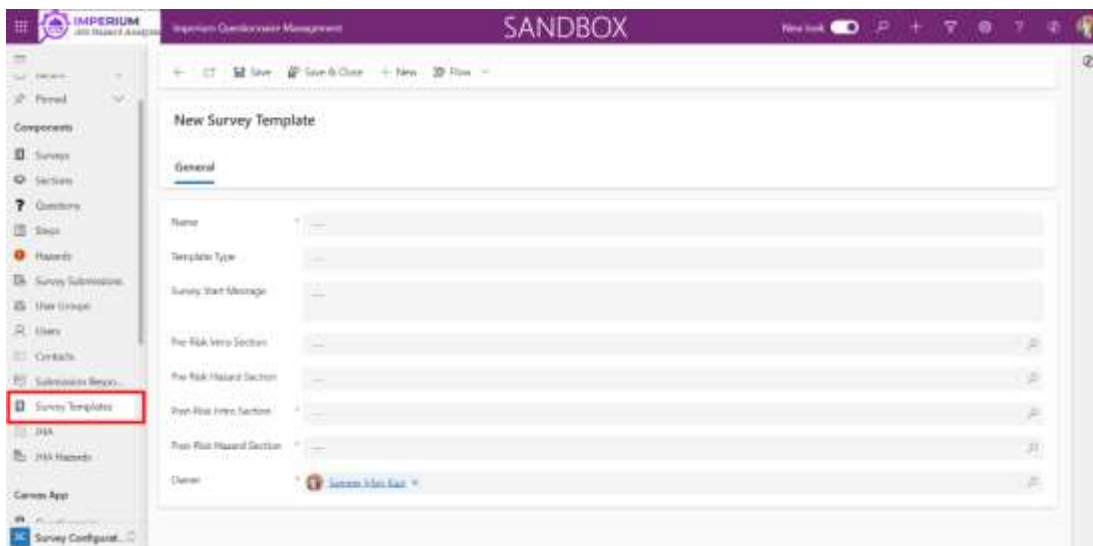
To apply Survey configuration, navigate to 'Survey Configuration' area to create and assign logic-based Surveys.

Survey Configuration tutorial: <https://www.youtube.com/watch?v=dI4TByRM5-w>

## Survey Templates

Create a new Survey Template on the Model Driven app, by navigating into the Survey Template entity, click '+New', which opens a main Survey Template form with the following fields:

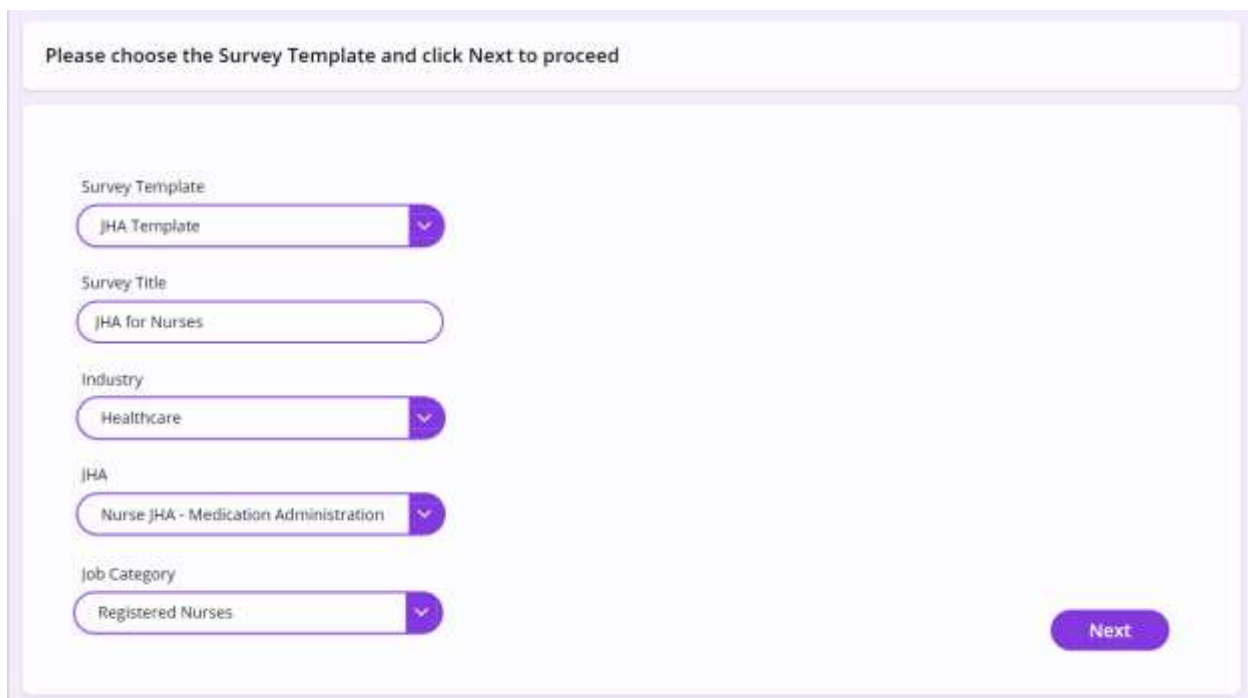
- Name: Give a name to your Survey template.
- Template Type: Choose if the template is of type; Job Hazard Analysis, Product Evaluation or OSHA Assessment.
- Survey Start Message: Enter a message you want to display at the start of the survey.
- Pre-Risk Intro Section: Choose the section that you want the wizard to replicate for the new pre-risk parent survey being generated.
- Pre-Risk Hazard Section: Choose the section that you want the wizard to replicate for the new pre-risk child survey being generated with questions relevant to the hazard.
- Post-Risk Intro Section: Choose the section that you want the wizard to replicate for the new post-risk parent survey being generated.
- Post-Risk Hazard Section: Choose the section that you want the wizard to replicate for the new post-risk child survey being generated with questions relevant to the hazard.



## Survey

Create Surveys from the Wizard Application, navigate to the wizard canvas app, The survey creation screen has the following fields:

- Survey Template: Select a template for the survey to follow.
- Survey Title: Give a title to your Survey.
- Industry: Choose the Industry the survey is being created for.
- JHA: Choose the Business Process Flow the survey will be a part of.
- Job Category: The Job Category gets filtered based on the industry, choose from the available Job Categories.



Please choose the Survey Template and click Next to proceed

Survey Template  
JHA Template

Survey Title  
JHA for Nurses

Industry  
Healthcare

JHA  
Nurse JHA - Medication Administration

Job Category  
Registered Nurses

Next

Click “Next” to proceed to the Steps selection screen, the steps are also filtered based on the Industry and Job Category that will be relevant, chose from the steps library on the left by just clicking on the “>” button next to the step and consequently removed by clicking the “X” in the selected steps window on the right. One can also create new steps by clicking on the “+” button.



Please select the Steps and click Next to proceed

Choose Steps

+

- Patient Examination >
- Taking Patient Medical History >
- Performing physical examinations >
- Obtaining vital signs >
- Assessing pain levels >

>

Taking Patient Medical History ✕

Obtaining vital signs ✕

Assessing pain levels ✕

Back

Next

Add New Steps

\* Name

Industry

Description

Hazard Type

Job Category  

▼

Back

Submit

The “Add New Step” screen has the following fields:

- Name: Enter a name for the step.
- Industry: Choose the Industry the step belongs to.
- Description: Enter a brief description of the Step.
- Hazard Type: Choose if the Step belongs to Physical, Biological, Ergonomic, Chemical or Psychosocial category.

- Job Category: Choose from the available Job Categories the step belongs to.

Click “Submit” to submit and add the step to the step library, this can then be chosen as a step, in survey creation. Click “Next” to move to hazard selecting screen.

Pick the associated hazards from the hazard library on the left by clicking the “>” button or add new hazards by clicking the “+” button.

The screenshot shows a user interface for selecting hazards. At the top, a header reads "Please select the Hazards for each of Activity below and click Next to proceed". Below this, the main heading is "Choose Hazards for Patient Examination". On the left, there is a purple sidebar with a "+" icon and the title "Patient Examination". Inside this sidebar is a search bar labeled "Search Hazards" and a list of hazard categories, each with a right-pointing chevron: "Physical assault (hitting, kicking)", "Physical confrontation during resistance", "Physical resistance from patients", "Physical assault during de-escalation", and "Grabbing, pushing". A large chevron ">" is positioned between the sidebar and a large, empty purple rectangular area on the right, which is intended for the selected hazards. At the bottom left is a purple "Back" button, and at the bottom right is a dark grey "Next" button.

### Add New Hazards

\* Name

Job Category

Back
Submit

The “Add New Hazards” screen has the following fields:

- Name: Enter a name for the hazard.
- Job Category: Choose from the available Job Categories the hazard belongs to.

Click “Submit” to submit and add the hazard to the hazard library.

After the hazards are selected for each step individually click “Next” to move to the Summary screen to view a summary of the Survey that will be created and the selected activities and

### Summary

Summary

<b>Survey Title</b>	JHA for Nurses		
<b>Template</b>	JHA Template		
<b>Activity(s)</b>	Patient Examination   Taking Patient Medical History   Performing physical examinations		
<b>Hazard(s)</b>	<b>Patient Examination</b> <ul style="list-style-type: none"> <li>• Physical assault (hitting, kicking)</li> <li>• Physical resistance from patients</li> </ul>	<b>Taking Patient Medical History</b> <ul style="list-style-type: none"> <li>• Grabbing, pushing</li> <li>• Physical assault during de-escalation</li> </ul>	<b>Performing physical examinations</b> <ul style="list-style-type: none"> <li>• Risk of exposure to hazardous chemicals</li> <li>• Witnessing or experiencing violence</li> <li>• Patient Complaints</li> </ul>

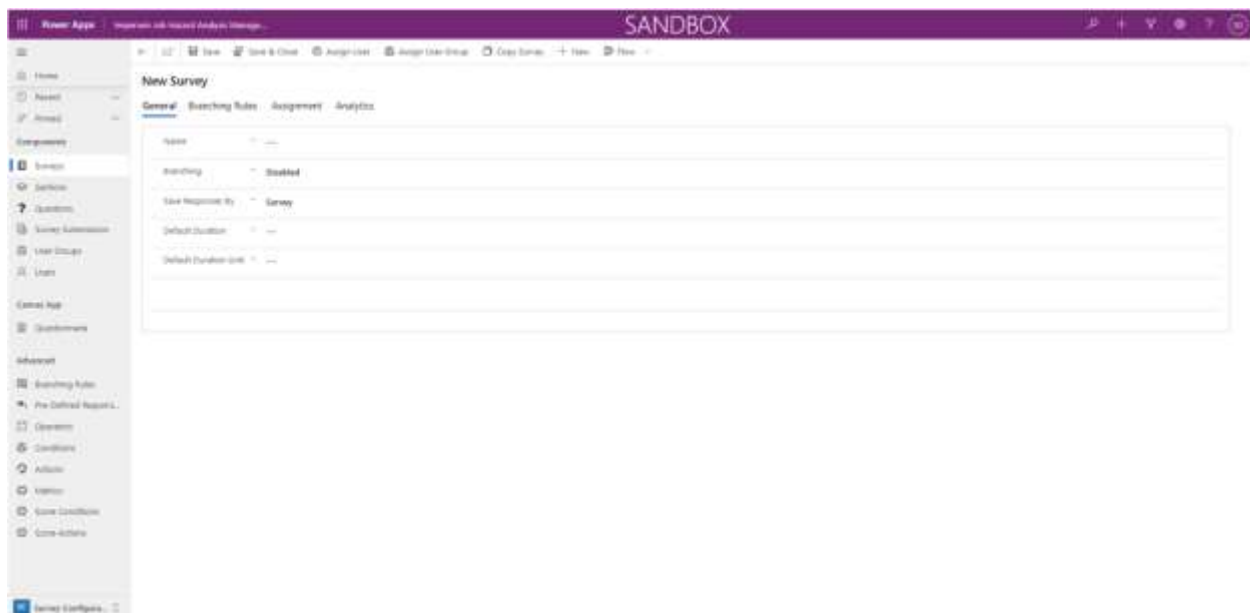
Back
Next

hazards.

Click “Next” to generate the survey through the wizard.

Alternately, create a new Survey on the Model Driven app, by navigating into the Survey entity, click ‘+New ‘, which opens a main Survey form with the following fields:

- Name: It is a required field. Give a name to your Survey.
- Branching: This is a required field, enable or disable branching that applies to the Survey.
- Save response by: This is a required field. Set an option to Save submission responses at the end of Survey, Section or Question.
- Default Duration: This is a required field. Define the duration time of the Survey.
- Default Duration Unit: This is a required field. Set a unit of the defined duration.



Add multiple Sections to the Survey by clicking on + New Survey Section a quick create form appears:

- Survey: The field is locked and set to the survey by default.
- Order: This is a required field. Order determines the sequence of the section in the survey.
- **Section:** Click on the blank field, ‘+ New section’ and a **New Section**, a pop-up message appears, click OK to proceed.
  - Name: This is a required field. Give an appropriate name to section.
  - Hazard: This a lookup of the related hazard, it can be manually chosen, or it gets auto populated when a section is created by the wizard.

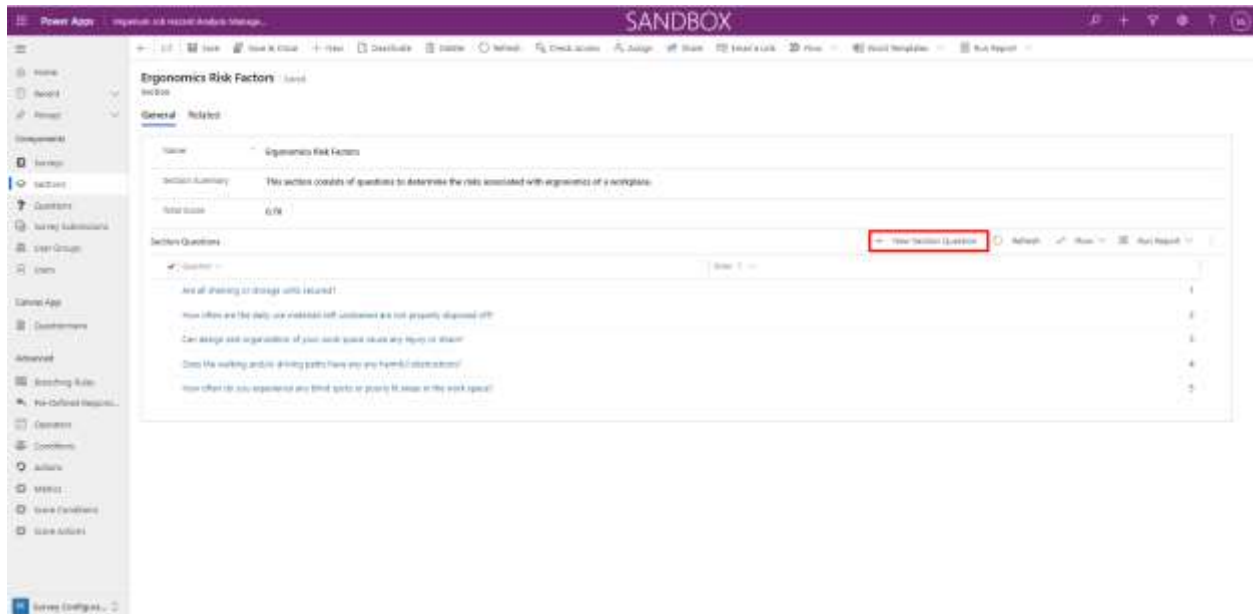
- Hazard Type: Choose if the section belongs to Physical, Biological, Ergonomic, Chemical or Psychosocial hazard category.
- Section Summary: This is not a required field. Provide a summary of the section. Define the type of questions this section contains.
- Scoring Method: Choose what mathematical operator should be used to calculate the section score.
- Total Score: Displays the total maximum attainable section score.

To add questions to the Section, navigate in the Section, move downwards on the same page to Section Questions. Click **+ New Section Question**. A quick create form appears:

- Section: The field is locked with section name by default.
- Order: This is a required field. Order determines the sequence of the question in a section.
- Question: This is the required field. Click on the blank field, '+New Question.' A pop-up message will appear. Click 'OK' to proceed.  
A New Question form will appear with some mandatory fields:

- Title: This is the required field. Give a title to the question. The same title is used to look up the question for configuring a section.
- Response Type: This is a required field. Select the type of response you want to produce for the question.
  - Text: The response will be based on text entered by the user on Questionnaire canvas app or portal.
  - Single-Select: Define the options end-users have as choices, out of which only one option can be selected. For example: Are you married? Yes, No.
  - Multi-Select: When the end-user has multiple options available, out of which the user can select multiple options as the answer to the question. For example: Which languages can you speak? English, German, French, Chinese, Italian, Arabic, Russian.
  - Image: If the answer to the question should be an image, then select this response type. This will give an attachment option to the end user for an image type.
  - Document: If the answer to the question should be a document, then select this response type. This will give a documentation attachment option to the user.
  - Numeric: This will allow the end user to enter a numeric response as the answer to the question.
- Required: This is a required option. Define whether the question is required or not. Based on this field, a warning message displays to the end user if the question is not attempted before submission, or when moving forward with the next question.

Click 'Save' to save the changes.



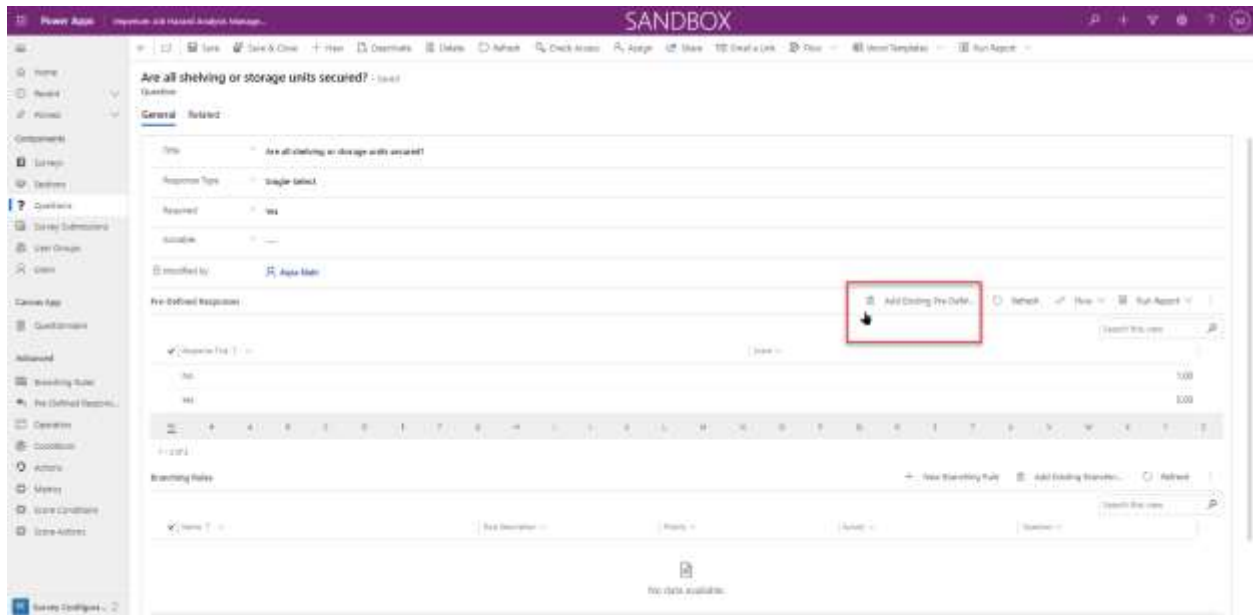


### **Pre-Defined Response:**

From the 'Related' tab, define Pre-Defined Responses for the Question.

- Click on 'Add Existing Response.'
- On the Lookup record form, click on '+ New Record.'
- Click 'Pre-Defined Response' in the record type.
- Response Title: It is a required field. Give the title to pre-defined response.
- Score: This is not a required field. Add a score to the field.
- Click 'Save and Close.'
- The Pre-Defined Response is auto selected in the Lookup records now. Click 'Add' to configure the Response against the Question. Whenever the Question appears at the user end, the Pre-Defined Response will be available to choose from the option set based on the response type selected (single-select or multi-select).

Go back to the return to the Section page. Click on the Question listed in the grid below main form. There are two grids on the questions page. The Pre-Defined Responses appear in the grid view below the main question form.



## Branching Rules:

Branching Rules allow configuring conditions and logic, based on which multiple actions can be performed.

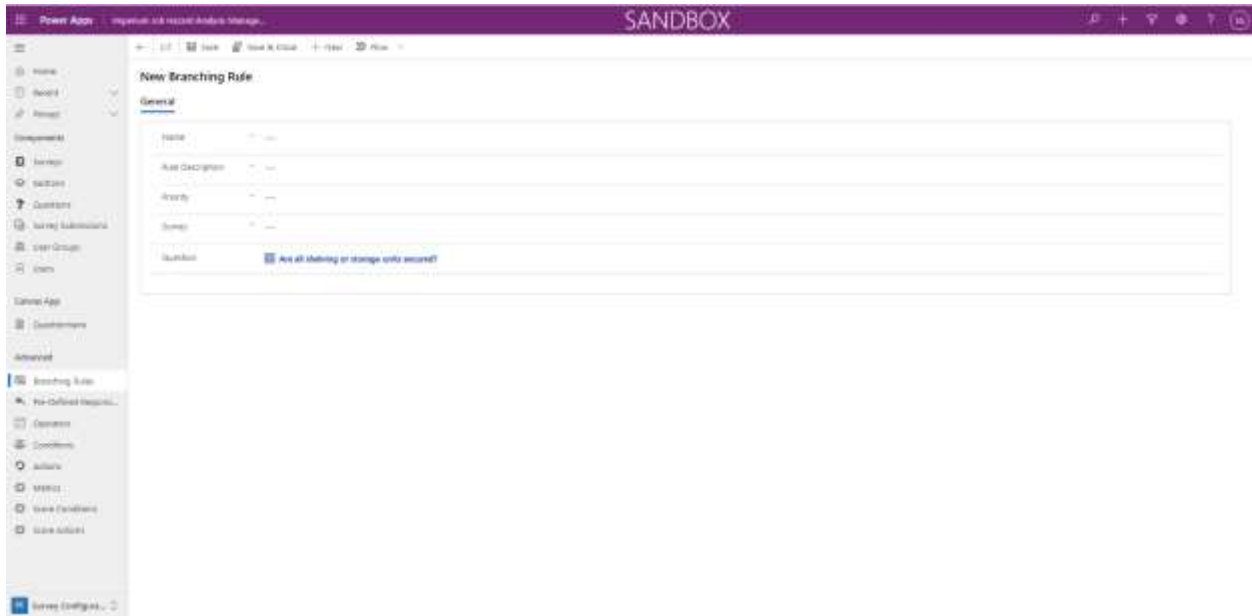
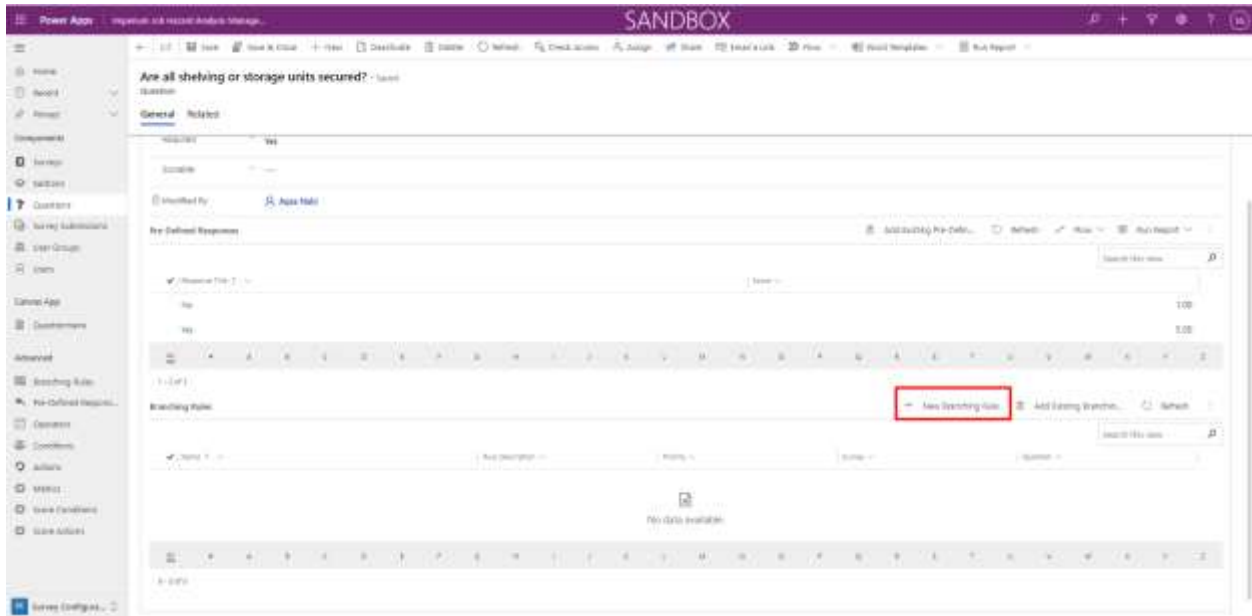
Branching Rules tutorial: <https://www.youtube.com/watch?v=SWWyggTvWBE>

To configure Branching Rules, navigate in a Survey and click 'Branching Rules' tab. The tab has a sub-grid with list view of rules configured on the Survey. Create a new branching rule by Clicking on the ellipsis. Click '+ New Branching Rule.' The main form for 'New Branching Rule' appears with the following form fields:

- Name: This is a required field. Give a name to the branching rule.
- Rule Description: This is a required field. Describe the branching rule, so it is easier to pick it later.
- Priority: This is a required field. Define the priority of your rule. At times, multiple rules are configured. To execute a particular function before the other, assign priority numerically. Rules will be executed in ascending order of priority.
- Survey: This is the required field. Select the survey from the lookup records.
- Question: The question is defaulted and unlocked.

Click 'Save' to start defining conditions inside the branching rule.





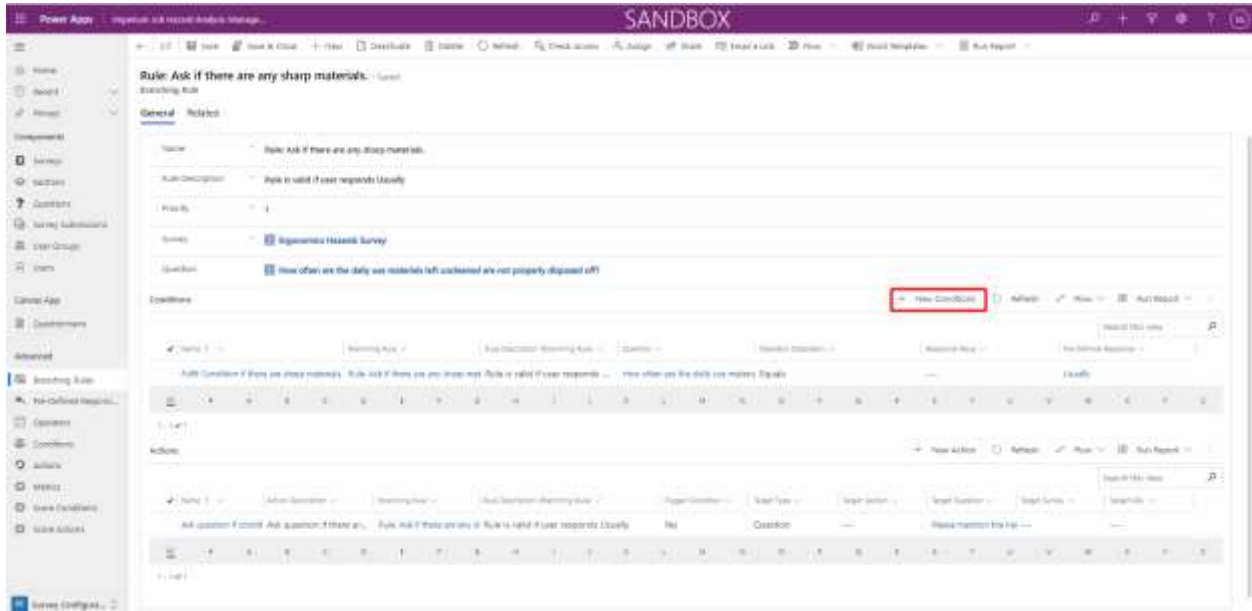
**Conditions:**

The grid view for conditions is located right below the main branching rule form. Create conditions based on the responses of the end user. Click the ellipsis, click '+ New Condition.' A quick create form for conditions appear, with the following form fields:

- Name: This is a required field. Give a name to the condition.
- Branching Rule: This is a required field. The Branching Rule is defaulted and locked.
- Question: This is a required field. Associate the Question from the lookup records option.
- Operator: Lookup the relevant Operator as the base of the condition.
- Pre-Defined Response: If the answer to the question should be compared with the pre-defined response, then select the pre-defined response from the lookup records.

- Response Value: If the answer to the question should be compared with a custom response, then enter a value in the field.

Click 'Save and Close' to save and close the quick create form changes successfully. A condition is now associated with the branching rule. To define an action based on the condition, move downwards, into Actions grid view.



Quick Create: Conditions

Name

Branching Rule: Rule: Ask if there are any sharp materi...

Question: Question: Required fields must be filled in.

Operator

Save and Close Cancel

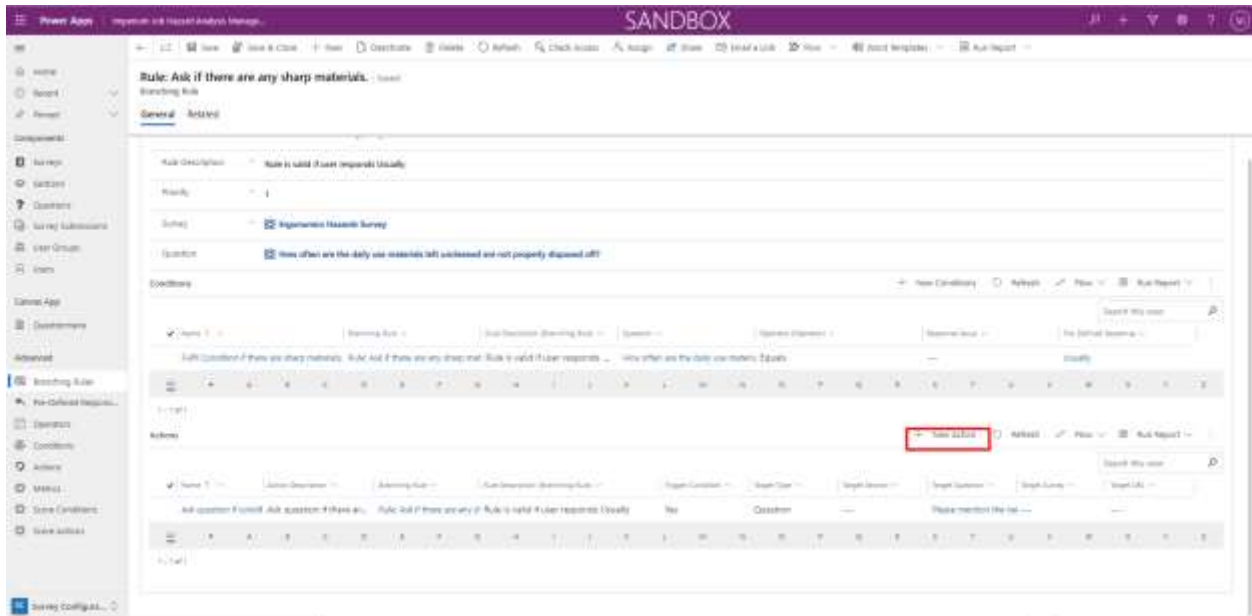
### Actions:

To create an action against a condition, click '+ New action,' a quick create form appears with multiple form fields:

- Name: This is a required field. Define a name for the action.
- Branching rule: This is a required field. The field is defaulted with the branching rule and locked.
- Action description: This is a required field. Describe the action for easy understanding of its performance and execution details.
- Trigger Condition: This is a required field.
  - Select **Yes** to trigger the condition based on the branching rule and associated condition.
  - Select **No** to not trigger the condition based on the branching rule and associated condition.
- Target Type: This is a required field. The condition applied on the question needs a next step defined. The target type has four entities, which determine the next entity the action takes an end-user to. The end user attempting the survey will be redirected to any one of the options configured for the question. Once the target type section is completed, the end user is redirected to the next question of the section.

- Section: For the end-user to land on a new section when the condition is met, select Section. A new form field will appear to select the section from the lookup record.
- Survey: For the end-user to land on a new survey when the condition is met, select Survey, where a new form field selects the survey from the lookup record.
- End of Survey: For the end-user to end the survey if condition matches the response, select End of Survey.
- Target URL: Select this option if you want to send a URL to the end-user when the condition matches the response. Paste the URL in Target URL.

Click 'Save & Close' on the quick create form to save changes.



Quick Create: Action

Name \*

Branching Rule \* Rule: Ask if there are any sharp materi...

Action Description \*

Trigger Condition \* No

Target Type \*

Save and Close Cancel

Click 'Save & Close' to save all the configurations applied on the question. The question page with the question title appears on the screen. Click 'Save & Close' to save changes. The section page with section title appears on the screen. click 'Save & Close' to save changes. The Survey page with Survey title appears on the screen.

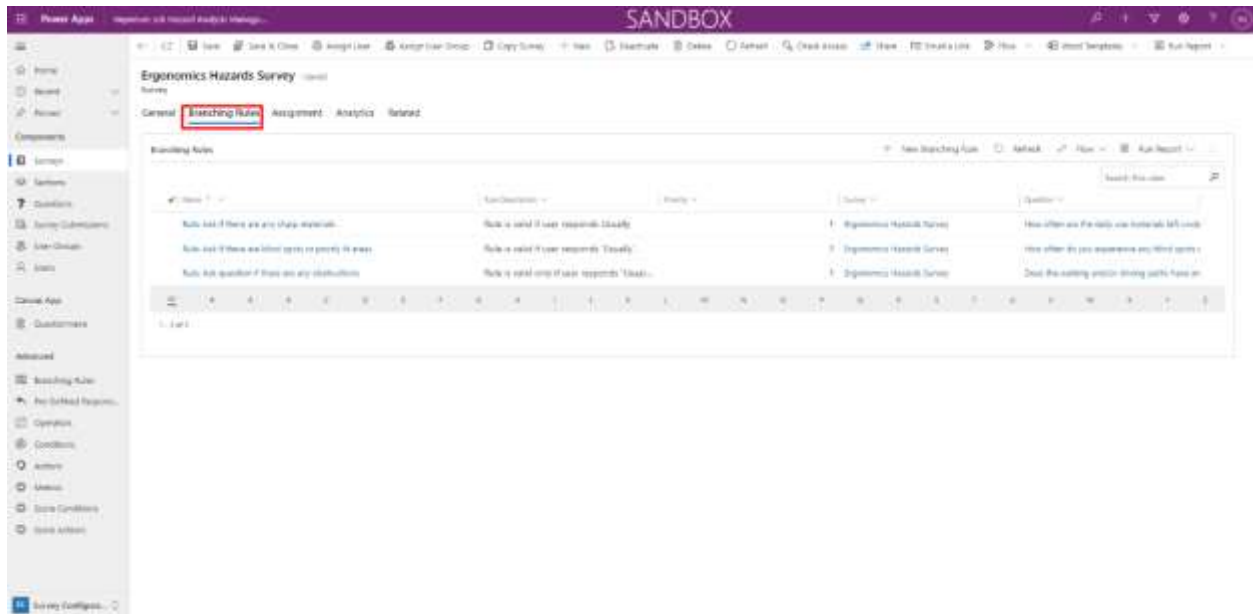
The Survey has Score-based emails set up. These emails are configured based on the score calculated at the end of Survey submission. The system checks for the condition set and sends an email accordingly to the email recipients.

On the main Survey form, configure the email notification channel.

- Send Score-based notification when the score is: This is a required field. Provide an operator which compares the end-user's score with the score defined on the Survey.
- Than: This is a required field. Provide a numeric value to compare the end-user's Survey score with.
- To: This is a required field. Select the recipient of email from the lookup.
- Email Template: This is a required field. Create a new or select an existing email template from the lookup.

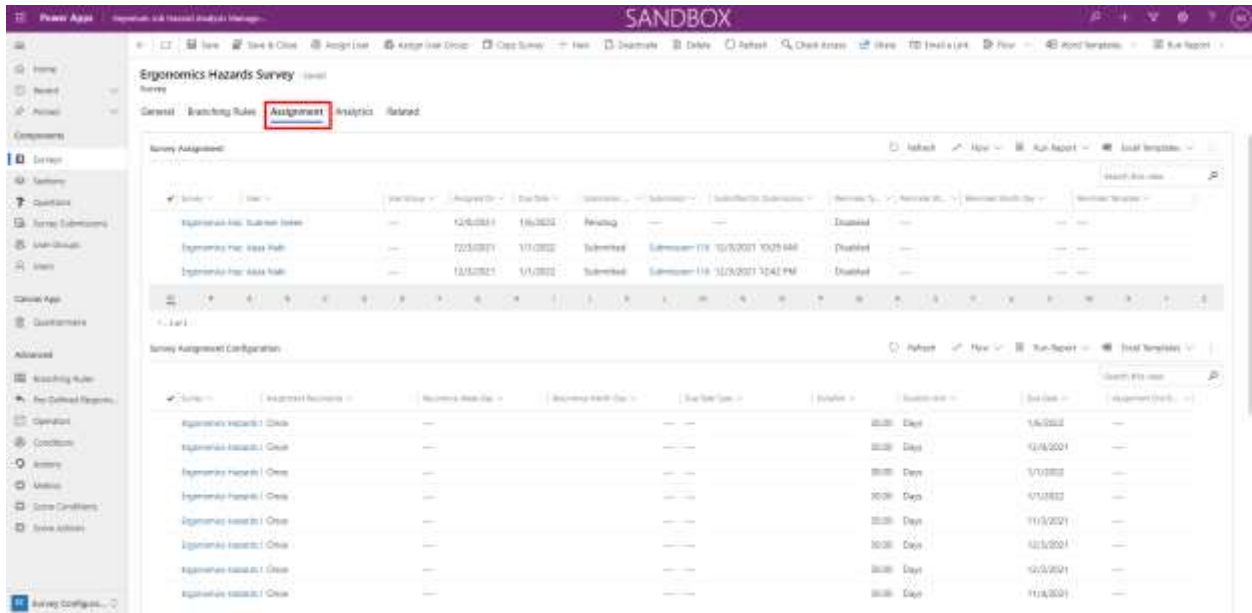
## Branching Rules:

Inside the Branching Rules tab on the main Survey, a grid view is defined with conditions and actions listed. Admins can navigate within each condition or action to make required changes.



## Assignment Tab:

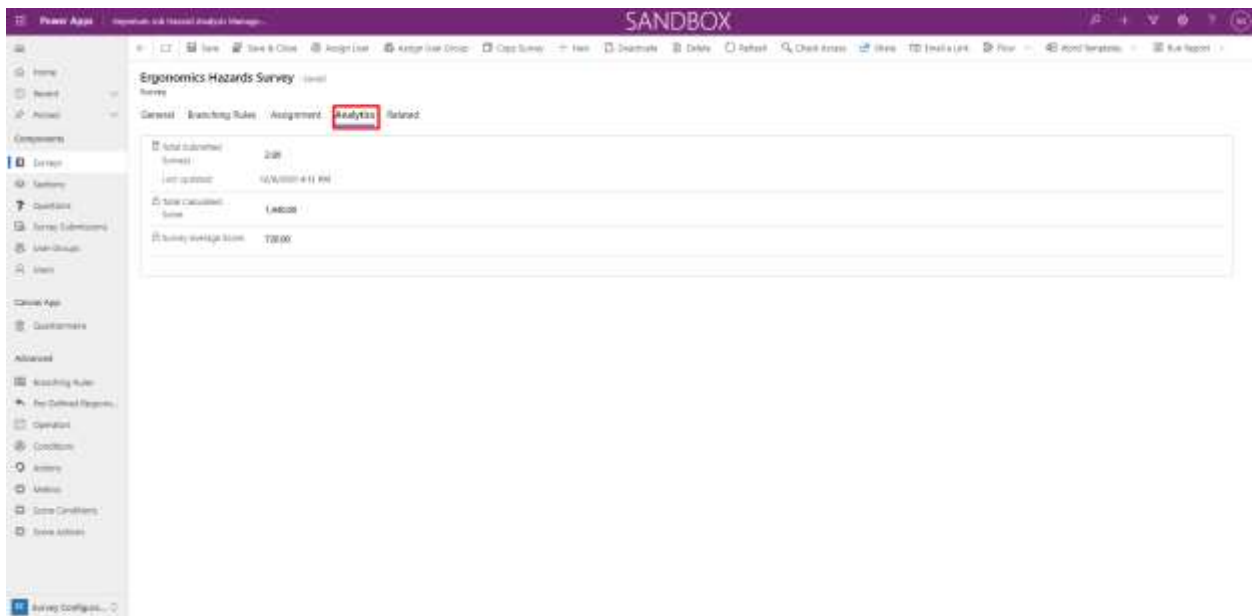
To view certain Assignments configured on the Survey, click on a Survey, navigate to the 'Assignment' tab. Here multiple grids are established, each defining different sets of information related to Survey Assignment and User Submissions.



## Analytics:

The Average Score of Survey is stored in the Analytics tab. The form has three main locked fields, each representing different sets of data.

- Total Submitted Survey: Locked field. Represents the number of times Survey is assigned to a user.
- Total Calculated Score: Locked field. Represents the total calculated score from the Canvas Application, summation of each user's score.
- Survey Average Score: Locked field. Average Score, based on total submissions and total score.



## Scoring:

Define Score Rules based on responses received from each submission and configure rules with certain actions. The main Survey form has a sub-grid below the main form with a list of applied rules on the Survey Sections.

Score Rules tutorial: <https://www.youtube.com/watch?v=dZjI0rceipo>

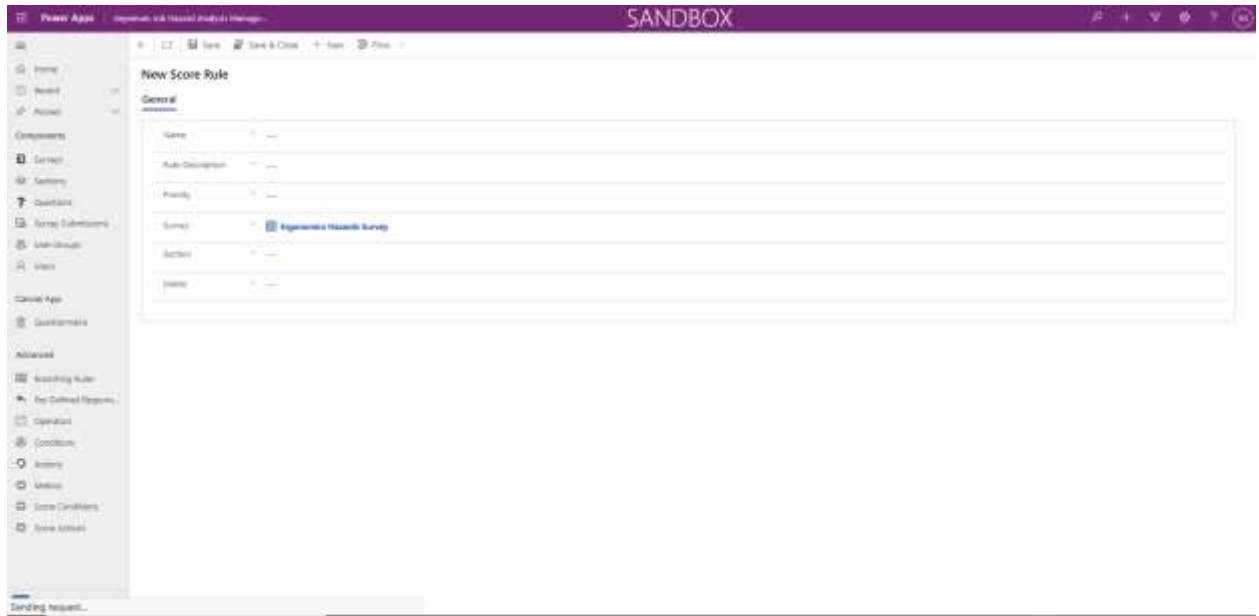
Select '+New Score Rule.' Admin is navigated to a new Main form, with the following form fields:

- Name: This is a required field. Give a name to the Rule.
- Rule Description: This is a required field. Describe the Rule purpose.
- Priority: This is a required field. Prioritize Rule by giving a number.
- Survey: This is a required field. The Survey is pre-selected.
- Section: This is a required field. Select the target Section on which the Score Rule should apply.
- Metric: This is a required field. Select Metric from the Lookup field or create one from the quick create form. The main purpose of associating Score Rules with Metrics is to group rules based on an attribute. Admin can create multiple Score Rules based on one Metric, for example:
  - Create a rule if the end-user's score is lower than the custom score.
  - Create a rule if the end-user's score is higher than the custom score.
  - Create a rule if the end-user's score is equal to the custom score.Similarly, Admin can create more rules and use a distinct Metric. Both Metrics have separate sets of rules for the same Survey, which allows the system to verify conditions of a set of Score Rules based on individual Metrics and execute multiple Score Actions.

Save and close to save changes.

The screenshot displays the 'Ergonomics Hazards Survey' configuration page. The left sidebar shows navigation options like 'Home', 'Recent', 'Profile', and 'Components'. The main content area is divided into several sections: 'General', 'Power2 Report', 'Branching Rules', 'Score Notification Settings', 'Assignment', 'Analytics', and 'Related'. The 'Score Rules' section is currently active, showing a table with columns for Name, Rule Description, Priority, Section, and Metric. A red box highlights the '+ New Score Rule' button in the top right corner of this section. Below the table, there are fields for 'Name', 'Rule Description', 'Priority', 'Section', and 'Metric', each with a 'Filter by keyword' option. The bottom of the page shows a 'Start Message' section with a rich text editor and a 'Save and Close' button.



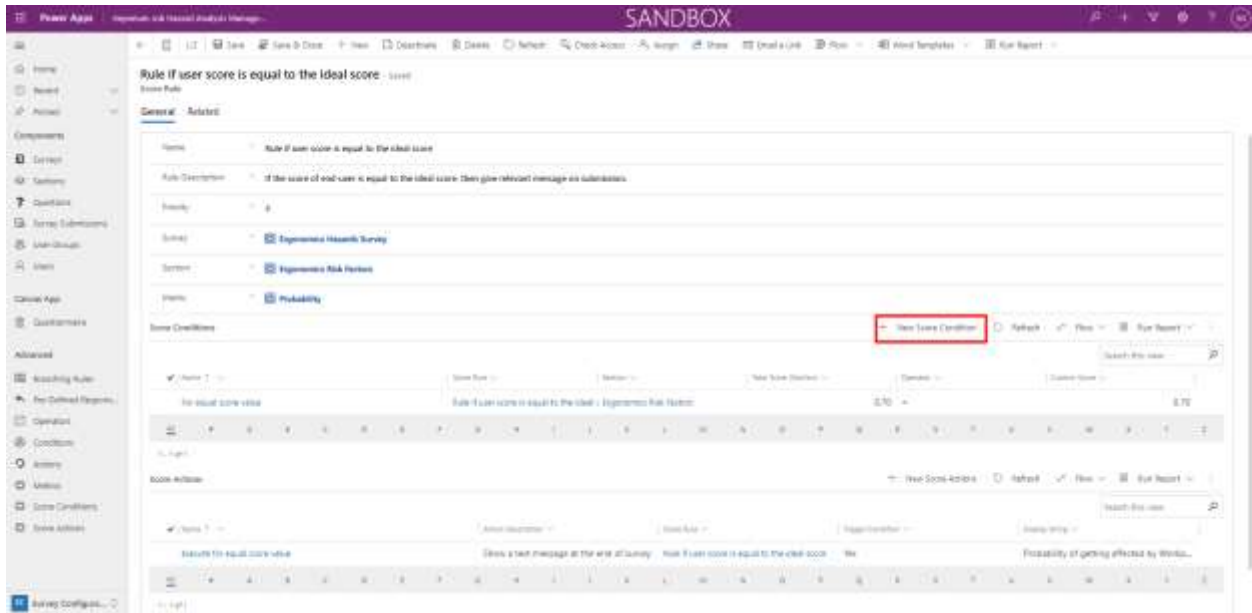


Navigate in the Rule from the Score Rules sub-grid, and create a Condition based on which an Action should be executed.

Click 'New Score Condition' from the sub-grid, which navigates the Admin to a Quick Create form.

- Name: This is a required field. Give a name to the Condition.
- Score Rule: This is a required field. The Score Rule is defaulted.
- Section: This is a required field. Select the target Section on which the Score Rule should apply.
- Operator: This is a required field. Select the operator type to perform comparison with.
- Custom Score: This is a required field. Give the score in a numeric form to compare the end-user's score with.

Save and close to save changes.

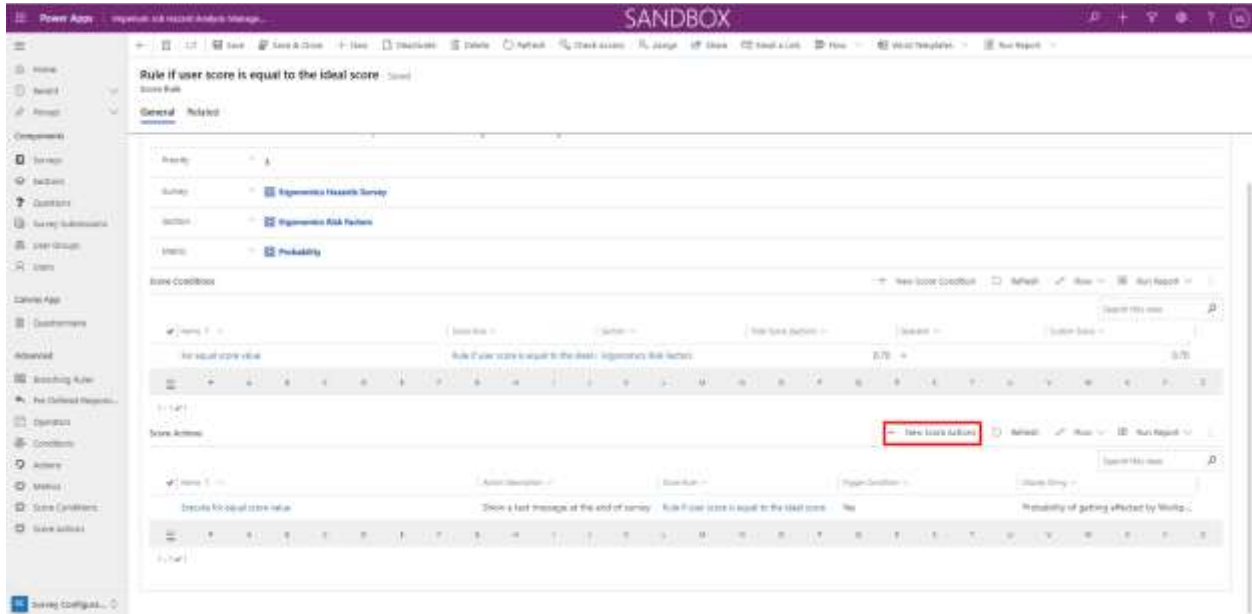


Navigate to the Score Actions sub-grid and create an Action, which uses the related condition.

Click '+New Score Action' from the Score Actions sub-grid, which navigates to a quick create form.

- Name: This is the required field. Give a name to the Score Action.
- Action Description: This is a required field. Describe the Action.
- Score Rule: This is a required field. The Score Rule will be defaulted in the form.
- Trigger Condition: This is a required field. Set the option to Yes or No.
- Display String: This is a required field. Input the text which should be displayed on the Canvas app once the end-user submits the Survey.

Save and close the form to save changes.



Quick Create: Score Actions

Name \*

Action Description \*

Score Rule \* [Rule if user score is equal to the idea...](#)

Trigger Condition \*

Display String \*

Save and Close Cancel

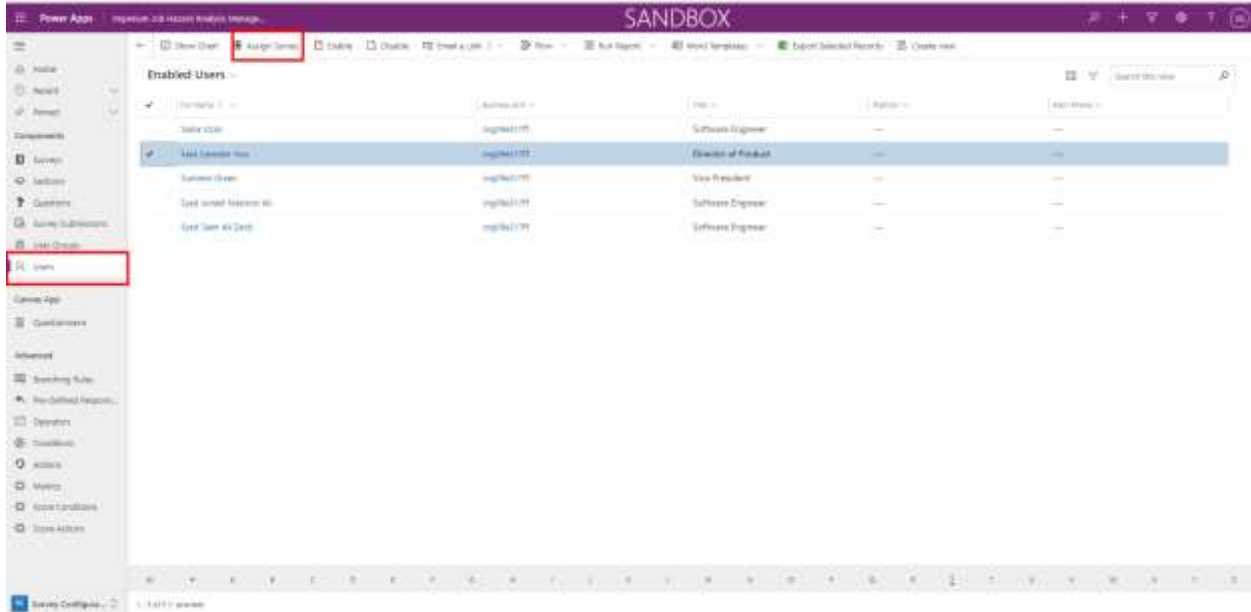
The Rule will be applied on the selected Section and compare results with the one input in the condition form. The system checks the fulfilled condition and displays the text in the Canvas application.

Admins can assign Job Hazard Analysis Surveys to Users and User Groups through different ways.

# Survey Assignment

## Assignment From Users View

To assign surveys to users, navigate in the 'Users' view, single select/multiselect users and click on Survey: This is a required field. Look up the survey you want to assign to the user.



- Assignment Recurrence: This is a required field. There are several options available to assign recurrence to the survey assignment.
  - Once: Select once if you want to assign the survey one time only.
    - Due Date: This is a required field. Define the due date for the survey.
  - Daily: Select daily if you want to assign the survey to the user daily.
    - Due Date: This is a required field. The default duration of the survey is displayed but can be changed as well.
    - Due Date Unit: This is a required field. The default duration unit of the survey is displayed but can be changed as well.
    - Assignment End Date Limit: This is a required field. Define the end date of the recurrence for the survey.
  - Weekly: Select weekly if you want to assign the survey to the user(s) on one day of each week.
    - Assignment Weekday: Define the day of the week when the survey should be assigned.
    - Due Date Duration: This is a required field. The default duration of the survey is displayed but can be changed as well.
    - Due Date Duration Unit: This is a required field. The default duration unit of the survey is displayed but can be changed as well.

- Assignment End Date Limit: This is a required field. Define the end date of the recurrence for the survey.
  - Monthly: Select monthly if you want to assign the survey to the user(s) on one day of each month.
    - Assignment Month Day: Define the day of the month when the survey should be assigned.
    - Due Date Duration: This is a required field. The default duration of the survey is displayed but can be changed as well.
    - Due Date Duration Unit: This is a required field. The default duration unit of the survey is displayed but can be changed as well.
    - Assignment End Date Limit: This is a required field. Define the end date of the recurrence for the survey.
- Reminder: This is a required field. There are multiple options available, which can be selected based on the templates available and the type of recurrence selected.
  - Disabled: Choose disabled to not send any type of reminder to the end-user(s).
  - Daily: Choose daily to send a reminder daily.
    - Reminder template: Lookup a relevant template existing inside the template notification settings.
  - Weekly: Choose weekly to send reminders one day of every week.
    - Reminder Weekday: Choose the day of the week to send the reminder.
    - Reminder Template: Select a relevant template from the lookup of existing notification templates.
  - Monthly: Choose monthly to send reminder one date of every month.
    - Reminder Month Day: Select the date of month on which reminder should be sent every month.
    - Reminder Template: Select a relevant template from the lookup of existing notification templates.
  - Reminder End Date: An end date for the reminder, after which recurring reminders will not be sent.

**New Survey Assignment Configuration** [Close]

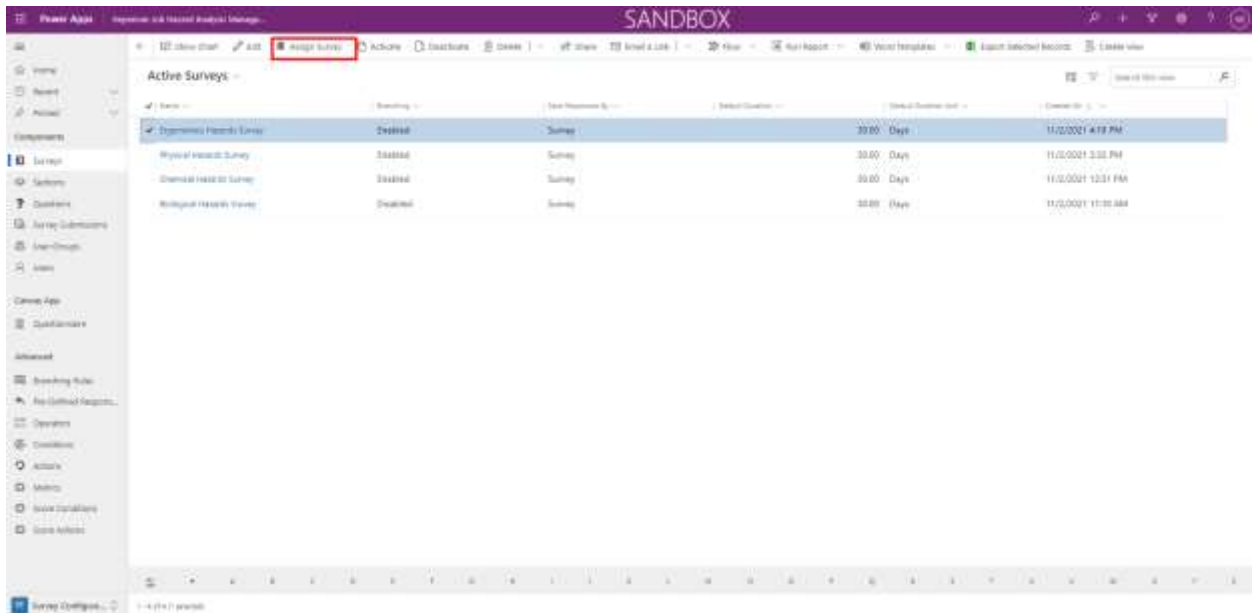
Save & Close

**New Survey Assignment Configuration** - Unsaved

General

Survey *	Biological Hazards Survey
Assignment Recurrence *	Daily
Due Date Duration *	30.00
Due Date Duration Unit *	Days
Assignment End Date Limit *	12/10/2021
Reminder *	Daily
Reminder Template *	Send Notification on Email

Surveys can also be assigned to User or User Group from a Survey. Navigate in a Survey from the Survey view, click on 'Assign User,' Assignment Form will pop-up with pre-selected Survey. Fill in the form fields such as User/User Group, Assignment Recurrence, Reminder details, Score-based Notifications. Save & close the form for the changes to take effect as defined.



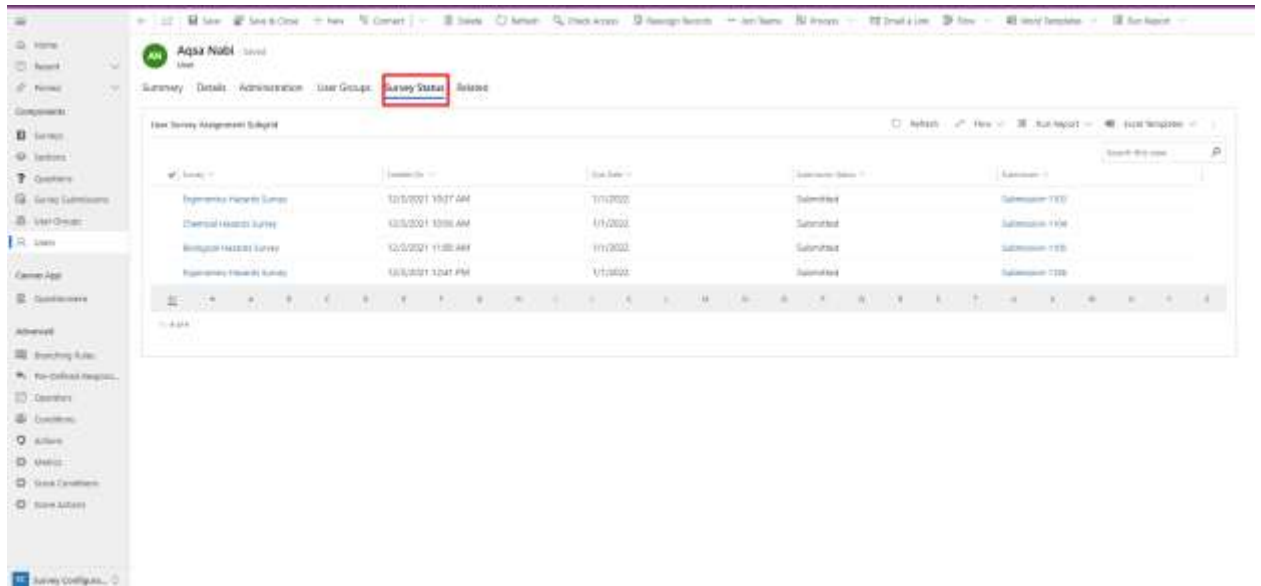
## View Assignment Details

In the Survey Configuration Area, navigate to a user from Users List view where multiple tabs are configured to view the Survey status assigned to the selected User.

- Summary: Basic contact information including email address, contact numbers, address details etc.
- Details: The tab has two main cards displaying secondary contact information and details.
- Administration: Displays the access level assigned to the user.
- User Group: The user group details if the user is added to any user group.
- Survey Status: An insight to view the status of all the assigned surveys with creation and due date.
  - Pending: If the survey is assigned and not submitted by the user, the status is shown as Pending.
  - In-progress: If the survey is assigned and the user is answering the survey questions, the status is shown as In- Progress.
  - Submitted: If the survey is assigned and the user has submitted it, it is displayed as Submitted.

Admins can also view the Submissions of each survey by navigating in their Submission Number from the Submission column. The page redirects and displays a card with survey and respondent details. A grid view below the card shows the response against each question of the survey.





### Assign From User Groups View:

Select an existing group from the 'User Groups' view or create user groups consisting of users to easily assign surveys to multiple users at once. Apply settings of survey recurrence, survey due date and reminder occurrence to a group of users. To create a group, navigate into User Group entity.

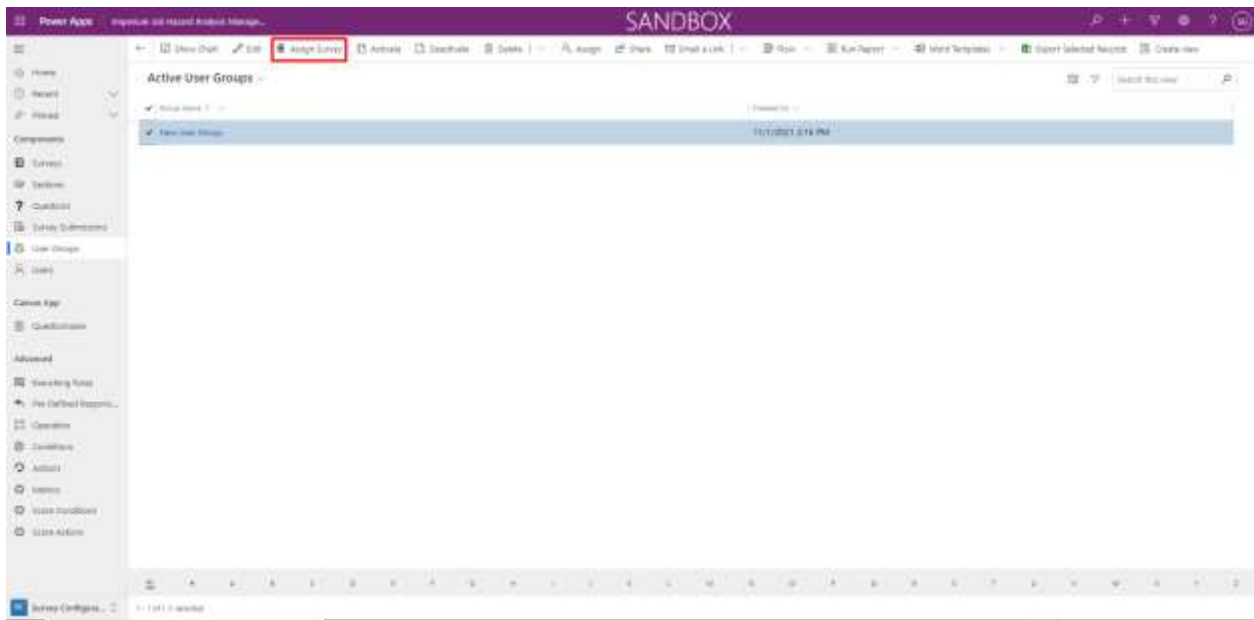
- Click + New on the top left pane
- New User Group form appears with field
  - Name: This is a required field. Give a name to the user group.  
Click save to add users to the user group.

A grid in the same tab with the title 'Users' appears where multiple users can be added to form a group.

- Click on 'Add Existing Users.'
- Select users from the Lookup records table.

Surveys can be assigned to user groups from a Survey as well. Select a Survey from the Survey view, select a user group, fill in the form fields such as Assignment Recurrence, Reminder details. Save & close the form for the changes to take effect as defined.

Surveys can also be assigned to user groups from a Survey. Navigate in a Survey from the Survey view, click on 'Assign User Group,' Assignment Form will pop-up with pre-selected Survey. Fill in the form fields such as Assignment Recurrence, Reminder details. Save & close the form for the changes to take effect as defined.



## New Survey Assignment Configuration



Save & Close

### New Survey Assignment Configuration - Unsaved

#### General

Survey	*	<input type="text" value="Ergonomics Hazards Survey"/>	
Assignment Recurrence	*	Once	
Due Date	*	1/8/2022	
Reminder	*	Disabled	

# **Admin Configuration**

## **Admin Settings:**

Admin can configure color settings and save notification templates for the application from this Area.

## **App Settings:**

The main application settings exist inside the admin configuration panel where to customize the color and picture of the application as per organization branding.

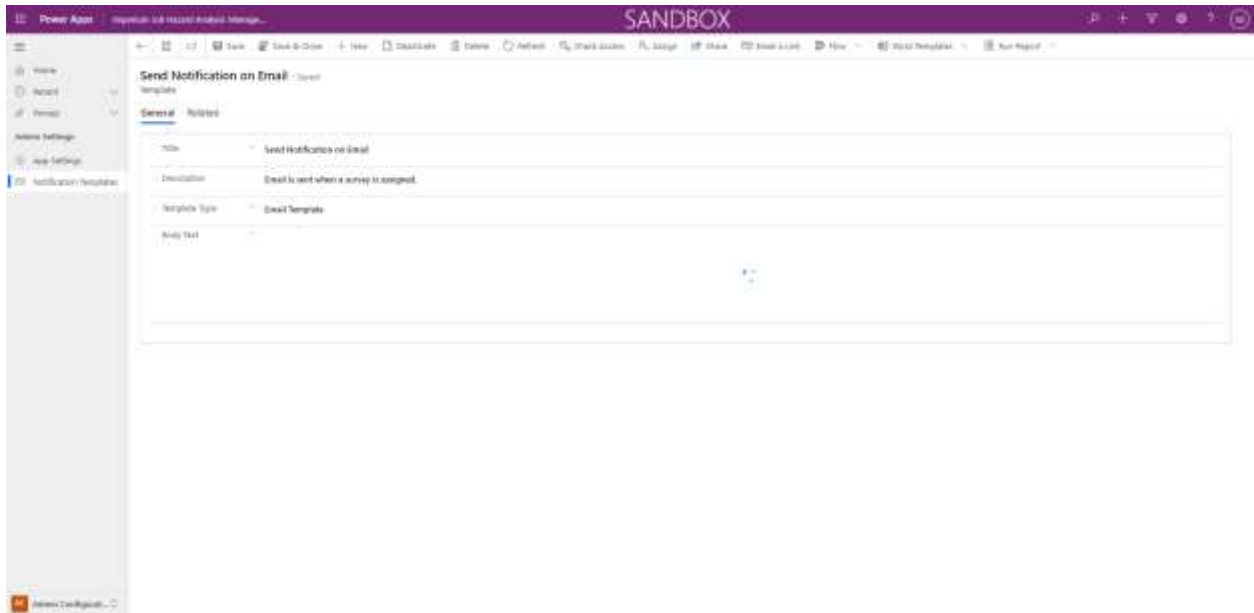
- Primary Color: This is a required field. Define the prime color of the application. Set a color that matches the brand.
- Secondary Color: This is not a required field. The application's design specifies a secondary color, Define the color for the rest of the area as per choice.
- Brand logo: This is not a required field. Change the brand logo to add the organization's logo.
- Pending Surveys: This is not a required field. Change the Pending Survey tile color on the Canvas App as per choice. The color indicates that the Survey is due, where Submission Status is Pending from the user-end.
- Expired Surveys: This is not a required field. Change the Expired Surveys tile color on the Canvas App as per choice. The color indicates that the Survey is expired, where Submission Status is Pending from the user-end as the due date is crossed.
- Submitted Surveys: This is not a required field. Change the Submitted Surveys tile color on the Canvas App as per choice. The color indicates that the Survey is completed, where Submission Status is Submitted from the user-end.
- My Pending Survey - Tile: This is not a required field. Change the Due Survey main tile color on the Canvas App as per choice.
- My Survey History - Tile: This is not a required field. Change the Survey History main tile color on the Canvas App as per choice.

## **Notification Templates:**

Define notification templates based on the recurrence level. Click + New to create a new template:

- Title: This is a required field. Give a name to template.
- Template Type: This is a required field. Select the type of template.
- Description: This is not a required field. Give a description for the template.
- Body Text: This is a required field. Enter context for your template. There are proper formatting options available for the template content.

Click 'Save & Close' to use this template when configuring reminders for survey assignment.



# Survey Responses

## **Dashboards:**

The Sub-area has three main dashboards, for Admin to monitor real-time data.

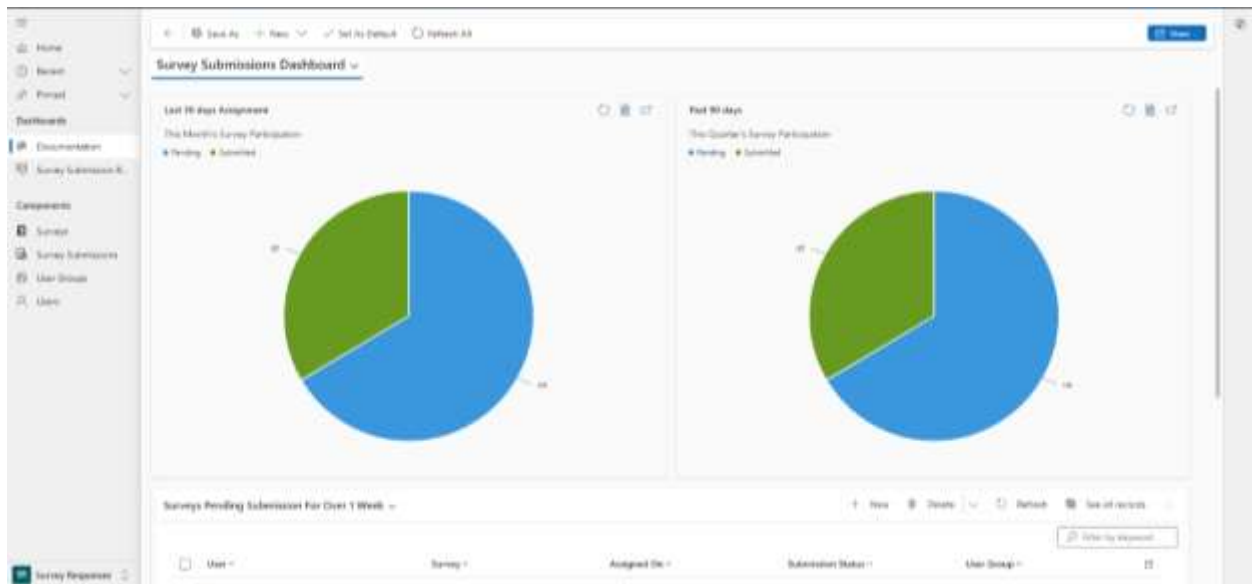
## **Documentation:**

The documentation dashboard has the knowledge base article for the Application with detailed steps mentioned for Survey Configuration and reviewing submission data.

## **Survey Submissions Dashboard:**

The dashboard has a graphical representation of the submissions made for Job Hazard Analysis Surveys deployed in the solution.

Admin can analyze responses against every question, responses based on individual sections, and the average score of active surveys.



## **Survey Submission Responses:**

A list view representing responses for every question based on the selected Survey and Section. Admin can apply filters to view responses for different Surveys, Sections and Questions.

Power Apps | Physical and Mental Health Survey... | SANDBOX

Survey Submission Responses

Survey Submission	Submission	Section	Response
Physical Health Survey	Submission 1000	Severity of Physical Health	Rate your overall workplace condition based on safety precautions: 1
Physical Health Survey	Submission 1001	Physical Health Risk Factors	Please mention what of the temperature extremes you are facing: 00
Physical Health Survey	Submission 1002	Physical Health Risk Factors	How often does your regular work include subject to vibration? Usually
Physical Health Survey	Submission 1003	Physical Health Risk Factors	How often are you exposed to any vibration? Daily
Physical Health Survey	Submission 1004	Severity of Physical Health	What is the severity of exposure to hazardous chemical/compound? Low
Physical Health Survey	Submission 1005	Severity of Physical Health	Rate your overall workplace condition based on safety precautions: 2
Physical Health Survey	Submission 1006	Physical Health Risk Factors	Is there any noise in the workplace? No
Physical Health Survey	Submission 1007	Physical Health Risk Factors	How often does your regular work include subject to vibration? Usually
Physical Health Survey	Submission 1008	Physical Health Risk Factors	Are you working at times of day that could affect your vision? No
Physical Health Survey	Submission 1009	Physical Health Risk Factors	How often do you experience temperature extremes that could affect vision? Usually
Physical Health Survey	Submission 1010	Physical Health Risk Factors	How often are you exposed to any vibration? Sometimes
Physical Health Survey	Submission 1011	Severity of Physical Health	What is the severity of exposure to hazardous chemical/compound? High
Physical Health Survey	Submission 1012	Severity of Physical Health	Rate your overall workplace condition based on safety precautions: 3
Ergonomics Health Survey	Submission 1013	Ergonomics Risk Factors	Can design and organization of your work space make you happy or No
Ergonomics Health Survey	Submission 1014	Ergonomics Risk Factors	Does the walking surface along paths have any harmful obstructions? Rarely
Ergonomics Health Survey	Submission 1015	Severity of Ergonomics Health	Rate your overall workplace condition based on safety precautions: 3
Chemical Hazards Survey	Submission 1016	Chemical Risk Factors	How often are the hazardous chemicals not stored and classified? Occasionally
Chemical Hazards Survey	Submission 1017	Chemical Risk Factors	Are you exposed to anything that can be inhaled, ingested or absorbed? Rarely

## **Job Hazard Analysis**

### **Job Hazard Analysis:**

The Sub-area has four main navigations:

- JHAs: Navigation to the JHA entity.
- Questionnaire Wizard: Navigation to the wizard canvas app.
- Activities: Navigation to the Activities entity where tasks, emails, appointments, phone calls can be configured.
- Submission Responses: Displays all survey submission records.

### **Setup:**

The Sub-area has four entities:

- Survey Templates: Navigation to the Survey Templates entity.
- Surveys: Navigation to the Survey entity.
- Steps: Navigation to the Survey Steps entity.
- Hazards: Navigation to the Survey Hazards entity.

### **Team:**

The Sub-area has three navigations:

- Users: Navigation to the User entity.
- User Groups: Navigation to the User group entity.
- Job Categories: Navigation to the Job Category entity.

### **Job Category:**

Create a new Job Category on the Model Driven app by navigating into the Job Category entity. Click '+New,' which opens a main Job Category form with the following fields:

- Name: Enter a name for the Job Category.
- Industry: Choose the Industry the Job Category belongs to.



