

CMO Dashboard Widget Guide

Contents

- I. Workflow Widgets 6
 - A. Text Widget..... 7
 - B. Shortcut Widget 8
 - C. New Event/Finding/Action/User Widget 9
 - D. Entity Widget.....10
 - E. New Event Widget.....11
 - F. Bulletins.....12
 - G. Location based Summary13
 - H. Org Unit Widget14
 - I. Action Widget15
 - J. Key Risk Indicators.....16
 - K. Register Filter / Search17
 - L. Rich Text Widget.....18
- II. Event Widgets.....19
 - A. Events by Category20
 - B. Events Widget.....21
 - C. Events by Status Widget22
 - D. Events by Status Chart.....23
 - E. Events Summary Widget.....24
 - F. Bottom 5 Entities by Score25
 - G. Top 5 Entities (by Score)26
 - H. Completed vs. Incompleted Events.....27
 - I. Scores vs Target Widget28
 - J. Top 5 Types/Categories29
 - K. Rolling Average Frequency Rate Widget.....30
 - L. Heatmap Widget.....31
 - M. Top 5 Opportunities32
 - N. Opportunities by Category.....33
 - O. Event List34
 - P. Response Summary Widget.....35
 - Q. Extended Response Summary Widget.....36
 - R. New Event Widget.....37
 - S. Key Risk Indicators.....38
 - T. Location based Summary39
 - U. Billing Widget.....40
 - V. Matrix Mitigation Analysis41











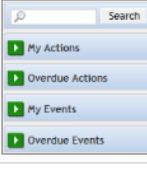
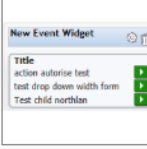

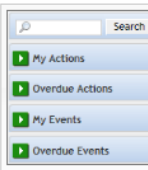
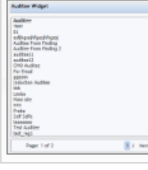

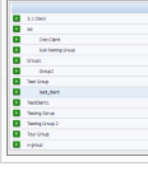
W.	Days Since Last Event.....	42
X.	Event Count.....	43
Y.	Individual / Party Involved Scoreboard.....	44
Z.	Frequency Rate Target	45
AA.	Key Performance Indicator	46
BB.	Entity Form Target Performance	47
CC.	Event Filling Tasks	48
DD.	Find Event Info	49
EE.	Rolling Average Frequency Rate by Entities.....	50
FF.	Safety Pyramid	51
GG.	Event Information Summary.....	53
HH.	PHAIR Widget.....	54
II.	Event Totals by Grouping	58
JJ.	Average Lost Time.....	60
KK.	Performance Analysis	61
LL.	Count Label Widget.....	63
III.	Finding Widgets	65
A.	Finding Widget.....	66
B.	Risk Matrix.....	67
C.	Risks by Category.....	68
D.	Potential Loss by Risk Category.....	69
E.	Risk Analysis	70
F.	Top 5 Findings by Amount.....	71
G.	Finding by Process	72
H.	Risk Mitigation Odometer.....	73
I.	Highest Risk Entities.....	74
J.	Risk Mitigation Analysis.....	75
K.	Risk Mitigation.....	76
L.	Matrix Mitigation Analysis (repeated from Events widgets)	77
M.	Control Effectiveness by Entity.....	78
N.	Control Status	79
O.	Test Status.....	80
P.	Key Risk Indicators.....	81
Q.	Open Actions by Risk Level.....	82
R.	Root Cause Analysis	83
IV.	Training Widgets	84
A.	Policy Attestation & Compliance Management	85

B.	My Training Plan	86
C.	Training & Competence.....	87
D.	Overdue Training/Competence.....	88
V.	Entity Widget.....	89
A.	Hours Worked per Entity per Month	90
VI.	Action Widgets.....	91
A.	Action Summary by Entity.....	92
B.	Pending vs. Completed Actions	93
C.	Recorded vs. Completed Actions.....	94
D.	Actions Status by Age	95
E.	Actions by Status	96
F.	Action Summary By Status	97
G.	Actions by Category	98
H.	Action Widget.....	99
I.	Entities with Most Outstanding Issues	100
J.	Total No of Actions	101
K.	Actions by Form	102
L.	Open Actions by Risk Level.....	103
M.	Key Risk Indicators (same widget found under Workflow and Events)	104
N.	Action Calendar.....	105
O.	Individual Scoreboard	106
P.	Action Risk Matrix.....	107
Q.	Action Status by Org Unit and Additional Info	108
VII.	Obligations.....	109
A.	Obligation Analysis by Job Title	110
B.	Obligation Analysis by Status.....	111
C.	Obligation Analysis by Topic	112
D.	Source by Status.....	113
E.	Source by Status Pie Chart	114
F.	Obligation By Instrument.....	115
G.	Obligation By Topic.....	116
H.	Source List.....	117
I.	Obligation List.....	118
VIII.	Documents.....	119
A.	Document Folders	120
B.	Policy Attestation & Compliance Management (same as in the Training section).....	121
C.	Document Navigator.....	122

IX.	Additional Info Field.....	123
A.	Entity Additional Info	124
B.	Org Unit Additional Info.....	125

I. Workflow Widgets

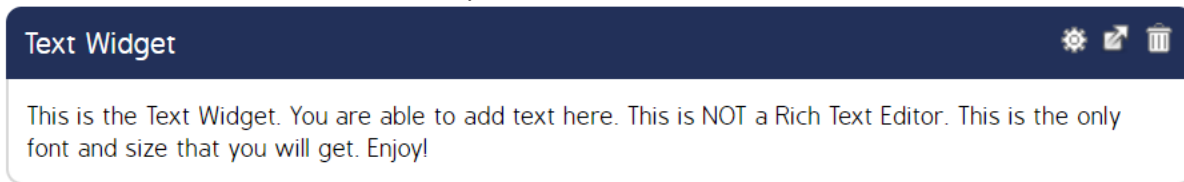
Select Widget

<div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;">  Workflow (13) </div> <div style="margin-bottom: 5px;">  Event (39) </div> <div style="margin-bottom: 5px;">  Finding (18) </div> <div style="margin-bottom: 5px;">  Training (4) </div> <div style="margin-bottom: 5px;">  Entity (1) </div> <div style="margin-bottom: 5px;">  Action (17) </div> <div style="margin-bottom: 5px;">  Obligation (9) </div> <div style="margin-bottom: 5px;">  Document (3) </div> <div style="margin-bottom: 5px;">  Additional Info Field (2) </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  <p>Text Widget Simple plain-text widget</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  <p>New Event / Finding / Action / User Widget</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  <p>New Event Widget</p> </div> <div style="border: 1px solid #ccc; padding: 5px;">  <p>Location based summary Location based summary</p> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  <p>Shortcut Widget Shortcut Widget</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  <p>Entity Widget</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  <p>Bulletins Bulletins</p> </div> <div style="border: 1px solid #ccc; padding: 5px;">  <p>Org Unit Widget</p> </div>
--	--	---

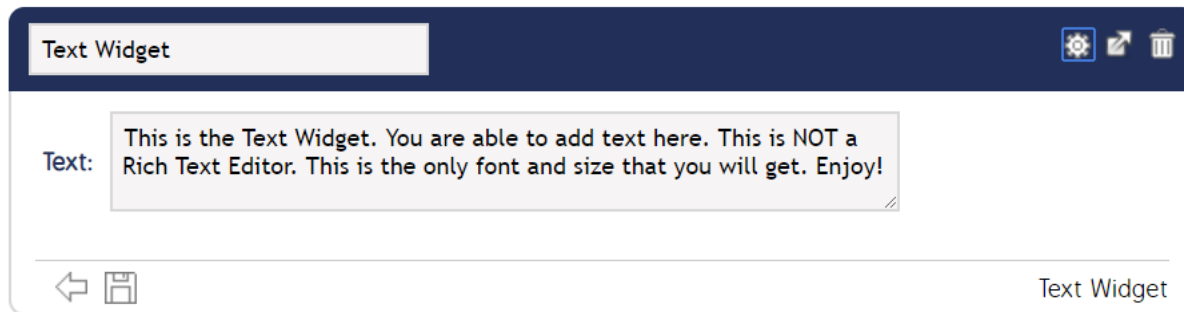
OK | Cancel

A. Text Widget

This widget gives you what it says it does, text. You don't have a rich text editor so you can't change the size of the font or the font. You can only alter the text that is entered.



Filters/Configuration



Text: Type the text in the box that you want to display.

B. Shortcut Widget

This widget allows you to see a listing of records with the name you type in the Search box, or to All Records (whether Events, Actions or whatever you configure in the filters).

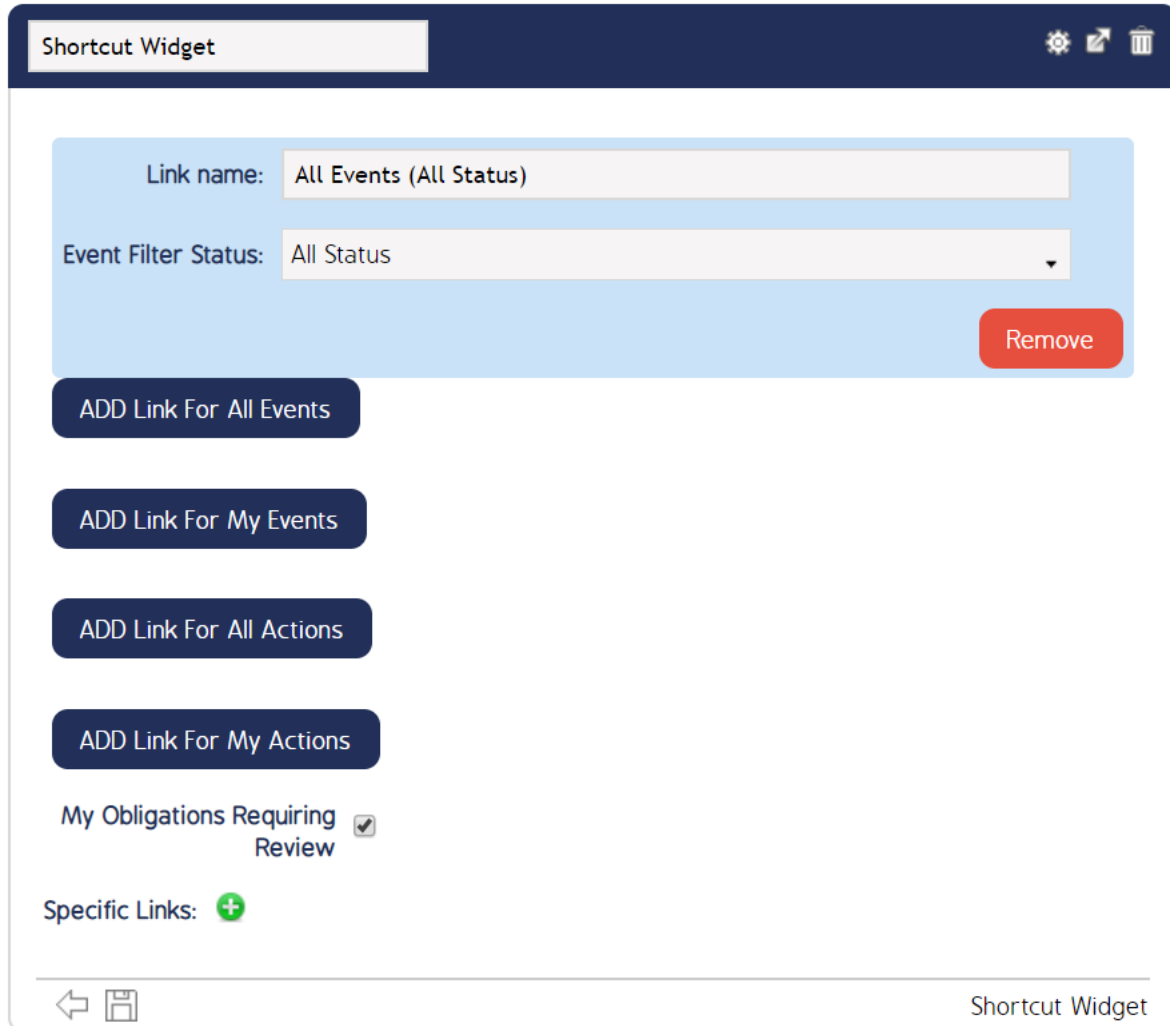


Shortcut Widget

agency

- All Events (All Status)
- My Obligations Requiring Review

Filters/Configuration



Shortcut Widget

Link name: All Events (All Status)

Event Filter Status: All Status

Remove

ADD Link For All Events

ADD Link For My Events

ADD Link For All Actions

ADD Link For My Actions

My Obligations Requiring Review

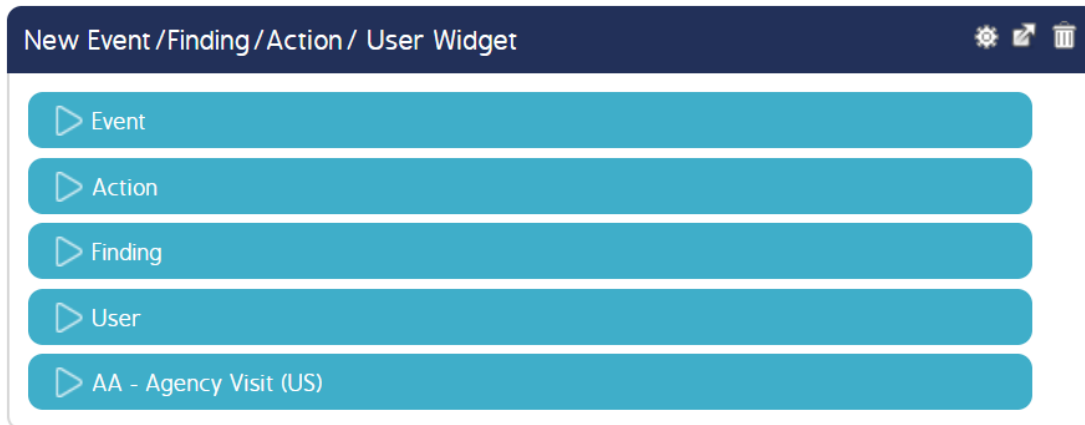
Specific Links: +

Shortcut Widget

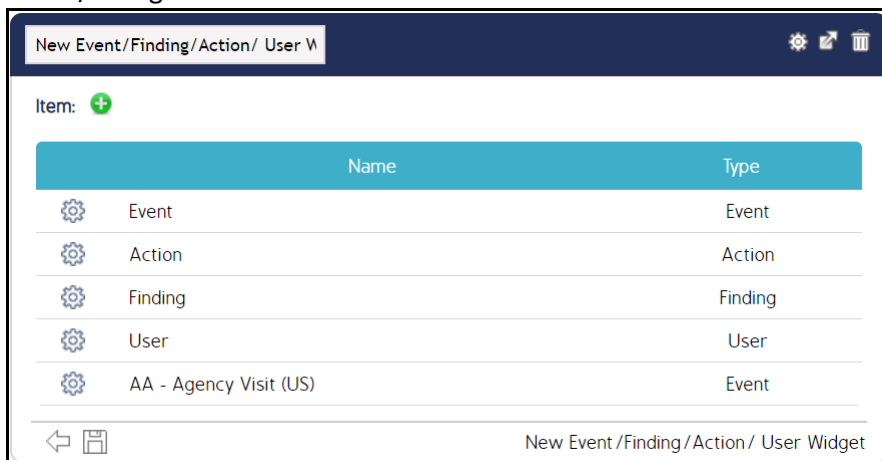
Select the “ADD Link” button that you want to see displayed. You may use ADD Link for “MY” Actions or Events. This will take you to the Register but the list will already be filtered to only see “my” records. Can be a nice time saver and eliminates some training in how to use the Registers.

C. New Event/Finding/Action/User Widget

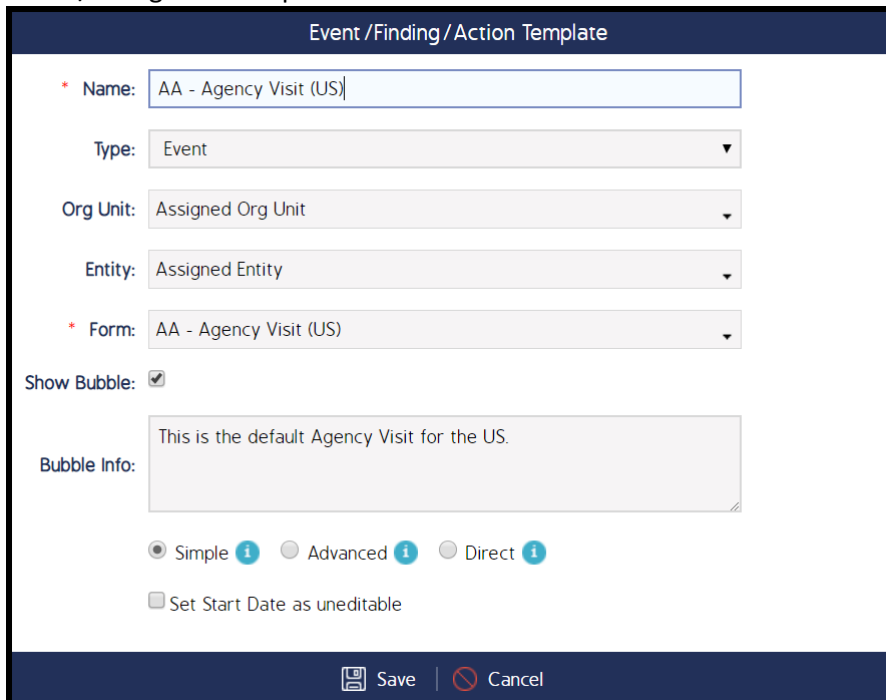
This widget allows you to create shortcuts to open Events, Findings, Actions, or Users.



Filters/Configuration












Filters/Configuration – part 2









Selecting “Assigned Org Unit or Entity” makes the shortcuts available to any org unit or entity. You also select the particular form you want the shortcut to go to. The Simple, Advanced, or Direct options refer to the pop up box screen when creating a new Event

D. Entity Widget

This widget simply displays the entities you have filtered to be able to view them and gives you a shortcut to open them if you want to edit them.

Entity Widget		  
	ATL	
	Corporate	
	DAL	
	DreamHomes	
	Head Office	
	Improvement Project	

Filters/Configuration

Entity Widget		  
Org Unit:	Airways Inc. 	<input type="text"/>
Entity Type:	All Entity Types	<input type="text"/>
SICS		<input type="text"/>
Account Code	Select options	<input type="text"/>
Rows:	50	<input type="text"/>
Search:		<input type="text"/>
 		Entity Widget

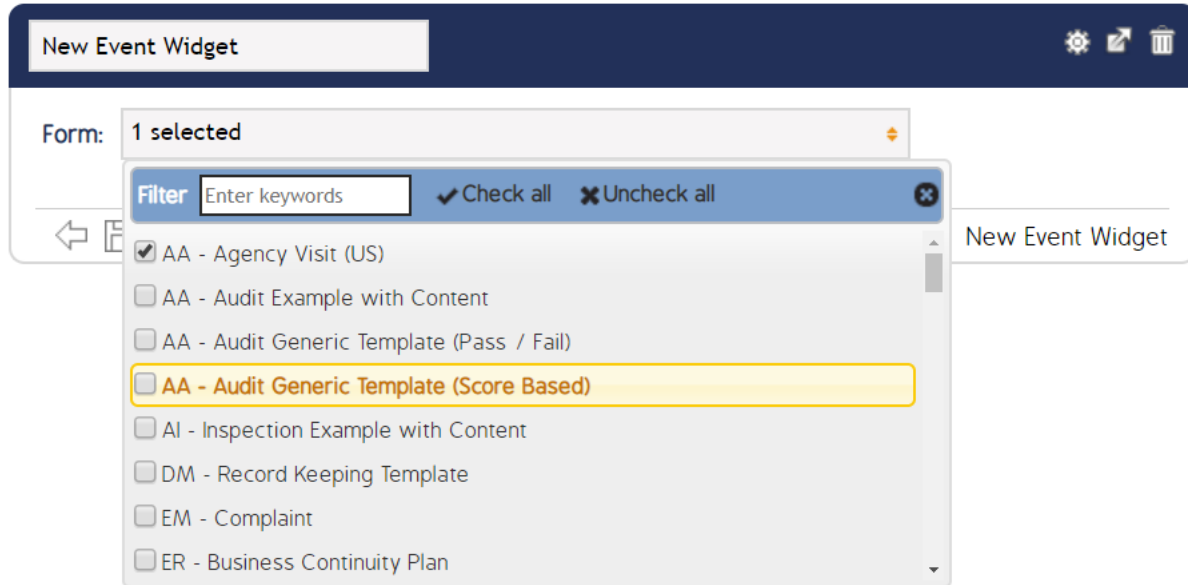
Org Unit(s) and Custom Entity Fields as well as # of rows and a Search field.

E. New Event Widget

Allows you to have a shortcut to create new Event records, very similar to New Event/Finding/Action/User Widget above. This widget is quicker to configure a new Event, but only offers the Simple data entry pop up when creating a new event.



Filters/Configuration



The only filter is for the form(s) you want to add to the widget.

F. Bulletins

This widget has no configuration. It simply allows you to display Bulletins. You would need to have permissions to Bulletins and have bulletins already created.



Filters/Configuration



G. Location based Summary

This widget can show a map with all your locations shown on it. However, for this to work there is configuration that needs to be done and the GPS coordinates of all your locations need to be listed in the Entity records.



Filters/Configuration



H. Org Unit Widget

This widget allows you to see a list of all your org units and open the org unit record by clicking on the name of the org unit. This may save a few clicks, instead of going to Admin > Org Unit to see the same.

Org Unit Widget

- Airways Inc.
 - Crew
 - Pilots
- Contractors
 - ABC Contract Company
 - Cheap & Dirty
 - EDF Contractors
 - Fast Contractors
- Corporate
 - Finance
 - Human Resources
- Maintenance
- Operations
 - Australia Pacific Operations
 - Australian Operations
 - New Zealand Operations
 - Europe, Middle East and Africa (EMEA) Operations
 - African Operations
 - European Operations

Filters/Configuration

Org Unit Widget

Levels:

View Inactive

Rows:





Search:

Org Unit Widget



You can filter by level, # of rows, View Inactive, and a text Search field.



I. Action Widget

Same as the Action Widget under the Action section. Can display all actions for the Current User (as shown below) or for a specific user or Org Unit, Entity, etc.

Action Widget				
Action	Action Category	Responsible	Status	Due Date
 Document 2-Day End-User Training Agenda.docx attached to Event 201908051.0 is set to expire on 06 Aug 2019	Documents	Gary2 Moelk	Overdue	06 Aug 2019 
 Compliance test	Agreement	Gary2 Moelk	Overdue	29 Jul 2019 

Filters/Configuration

Action Widget	
Org Unit:	All Org Units
Entity Type:	Select options
Entity:	Select options
Action Category:	2 selected
Action Status:	
Responsible:	Current User
Due Date (From):	
Due Date (To):	
Order By:	Due Date
	Descending

  Action Widget

Can display all actions for the Current User (as shown above) or for a specific user or Org Unit, Entity, etc. as per the filters.

J. Key Risk Indicators

This widget allows you to count things like # of Events, Actions, Findings, or even Event Categories. You can then compare this period with the previous to see if there is an upward or downward trend.

Key Risk Indicators				
	Prev	Curr	Target	Trend
Injuries	25	37	30	↑
Findings (All Categories)	0	2		↑
Actions (All Action Levels)	16	26		↑
Extreme Findings	0	0		○
Audits Completed	3	7	5	↑

Filters/Configuration

Key Risk Indicators	
KRI Name	Type
Injuries	Events
Findings (All Categories)	Finding Category
Actions (All Action Levels)	Action
Extreme Findings	Current Risk Level
Audits Completed	Events

Filters/Configuration – 2

Key Risk Indicator

Name: Injuries

Target: 30.00

Aim to: Not Reach Target

Type: Events

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Filter By: Event Date

Period: Specify period

From Date: 01 Aug 2015

To Date:

Form: IM - Injury/Illness

Event Category: Medical Treatment Injury (MTI), First Aid Injury (FAI), Lost Time Injury (LTI), Restricted Work Injury (RWI)

Percent Completed on Time

Status: Select options

Sub Status:

Save | Cancel

Need a date filter (Year to Date) with the Previous being same period in previous year. Once configured, you may need to refresh the screen to get the results to update.

K. Register Filter / Search

This widget allows you to create a shortcut to various Registers.



You go to the register by clicking on the icon next to the module/register you want to display.

The screenshot shows the 'Events' filter section and a table of event records. The filter section includes dropdowns for Org Unit, Reporter, From Date, To Date, Entity, Form, Status, Sub Status, Event Category, and Event Type. There are also 'Export' and 'Search' buttons, and a 'Show child Events' checkbox. Below the filter is a 'Clear Filter' button. The table below has columns for ID, Entity, Event Title, Form, Reporter, Due Date, and Status. The status column contains color-coded labels like 'Open - Draft', 'Complete', and 'Planned'.

ID ↑	Entity	Event Title	Form	Reporter	Due Date	Status
201908052.0	DreamHomes	AA - Agency Visit (US) 05Aug2019	AA - Agency Visit (US)	Gary2 Moelk		Open - Draft
201908051.0	DreamHomes	AA - Agency Visit (US) 05Aug2019	AA - Agency Visit (US)	Gary Moelk		Complete
201908021.0	DreamHomes	AI - Inspection Example with Content 02Aug2019	AI - Inspection Example with Content	Gary2 Moelk	02 Aug 2019 10:51	Open - Draft
201907311.0	Head Office	AA - Agency Visit (US) 31Jul2019	AA - Agency Visit (US)	Asa Turnipseed		Open - Draft
201907291.0	Head Office	IM - Injury /Illness 29Jul2019	IM - Injury /Illness	Gary Contractor		Open - Draft
201906282.0	Head Office	General QA Observation Form 28Jun2019	zz General QA Observation Form	Bubba Ganoush		Open - Draft
201906281.0	Head Office	General Quality Observation Form 28Jun2019	zz General Quality Observation Form	Bubba Ganoush		Planned
201906193.0	Timbuktoo	General QA Observation Form 20Jun2019	zz General QA Observation Form	Bubba Ganoush		Warehouse Review

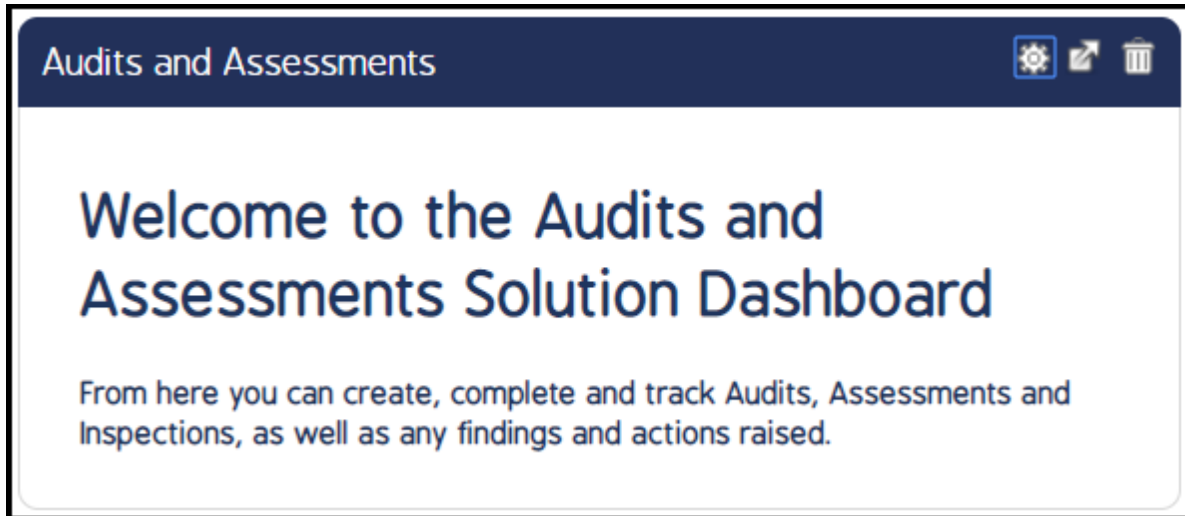
Filters/Configuration

The screenshot shows the configuration panel for the 'Register Filter / Search' widget. It has a dark blue header with the title 'Register Filter / Search' and three icons: a gear, a share icon, and a trash icon. Below the header, there are six rows, each with a checkbox and a text input field. The rows are: 'Events' (checked), 'Sources' (unchecked), 'Obligations' (unchecked), 'Actions' (checked), 'Findings' (unchecked), and 'Documents' (unchecked). At the bottom, there is a 'Register Filter / Search' button and a 'Register Filter / Search' label.

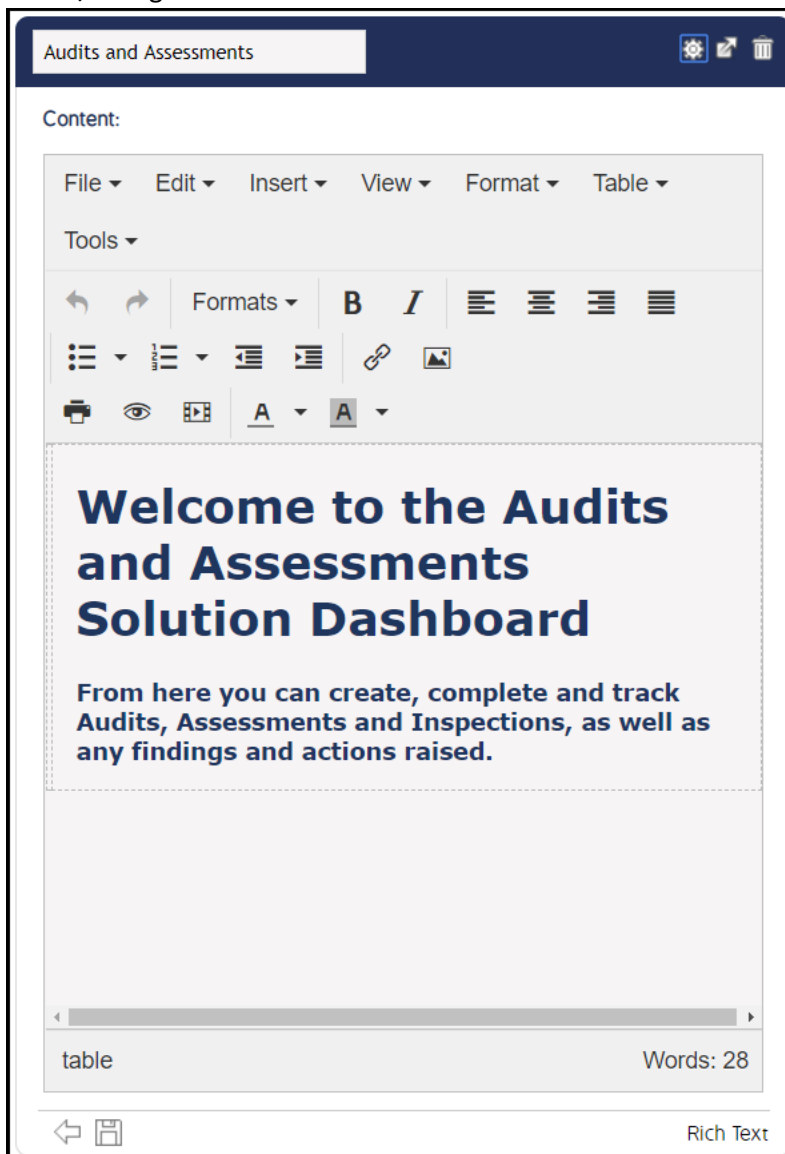
You simply click the checkbox for the Register(s) you want to be able to access.

L. Rich Text Widget

This widget allows you to add text with a rich text editor so you can do text formatting and even add graphics.




Filters/Configuration




You can select various formatting options as well as insert graphics or links.


II. Event Widgets


Select Widget


 Workflow (13)


Event (39)


 Finding (18)


 Training (4)


 Entity (1)

 Action (17)


 Obligation (9)

 Document (3)

 Additional Info Field (2)




Events By Category
Events By Category



Events Widget
Events widget with Events by criteria

Overdue	3698
Due in 7 days	6
Awaiting Verification	189

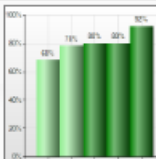
Events by status
Events by status



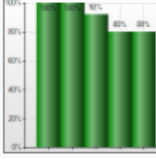
Events By Status Chart
Events By Status Chart

Events Summary	
Overdue	491
Today	6

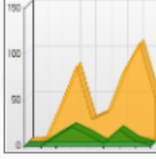
Events Summary
Events Summary



Bottom 5 Entities (By Score)
Bottom 5 Entities (By Score)



Top 5 Entities (By Score)
Top 5 Entities (By Score)

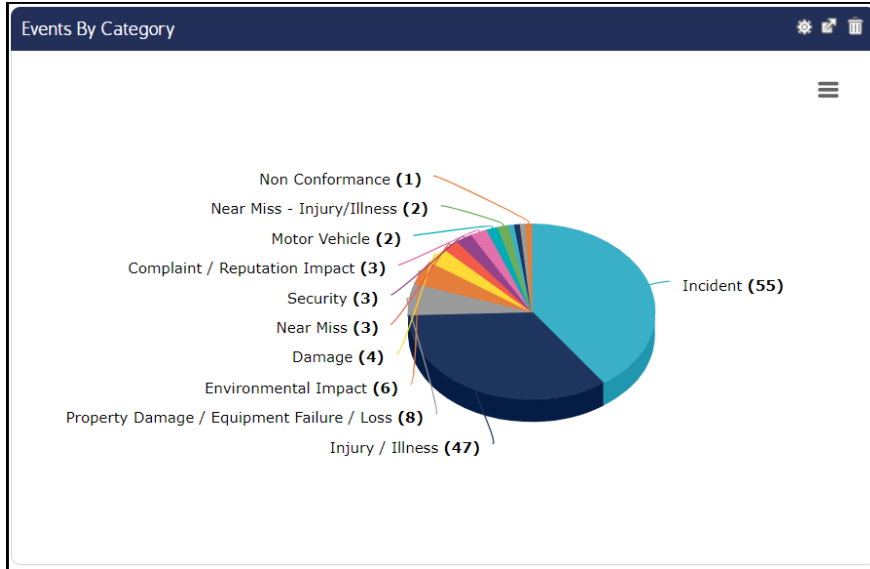


Completed vs Incompleted Events
Completed vs Incompleted Events chart

OK | X Cancel

A. Events by Category

This widget allows you to view via different charts the breakdown of Categories selected in forms. In the case below you see all incidents and their categories.



Filters/Configuration

The configuration panel for the "Events By Category" widget includes the following settings:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Form: IM - Incident Report
- Filter By: Event Date
- Date: Specify period
- From Date: 01 Aug 2015
- To Date: 14 Aug 2019

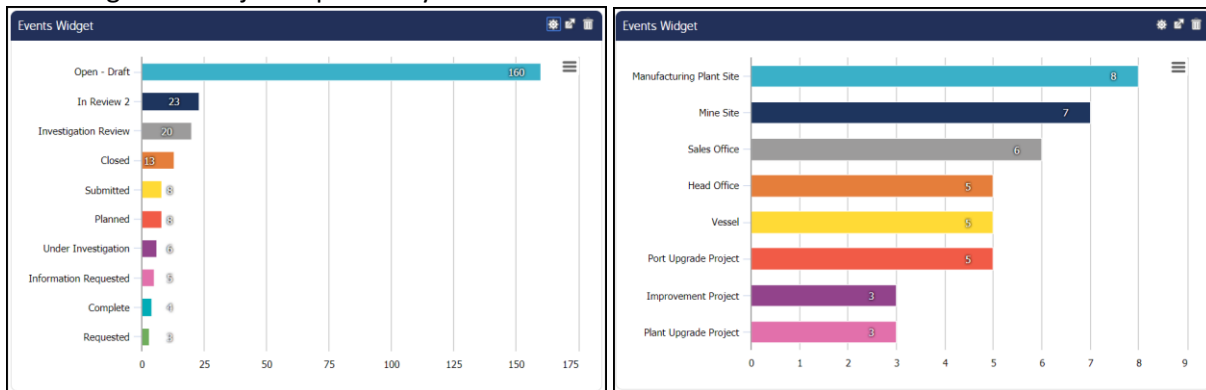
Parameters of Chart

- Display Widget As: Pie Chart
- Target (Bar and Column only):
 - Show Legend (Pie and Donut Chart only):
 - Show Data Labels:
- Color Scheme: Multicoloured
- Length for line breaks: 40

You can filter by hierarchy and form (only 1 form at a time), dates and the type of chart. **You cannot filter on Category, by default you see all categories.**

B. Events Widget

This widget is one of the most popular because it allows many views of your events. It will give you counts for events. For instance, the below widget on the left displays # of events in various statuses and on the right the # injuries per Entity.



Filters/Configuration

Events breakdown by: Entity

Org Unit/Entity Type: Use Org Unit and Entity Separately Use Org Unit and Entity Combinations

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Event Category: All Event Categories

Form: 1 selected

Filter By: Event Date

Date: Specify period

From Date: 01 Aug 2015

To Date: 14 Aug 2019

Injury / Illness form selected

Parameters of Chart

Display Widget As: Bar Chart

Target (Bar and Column only):

Show Legend (Pie and Donut Chart only)

Show Data Labels

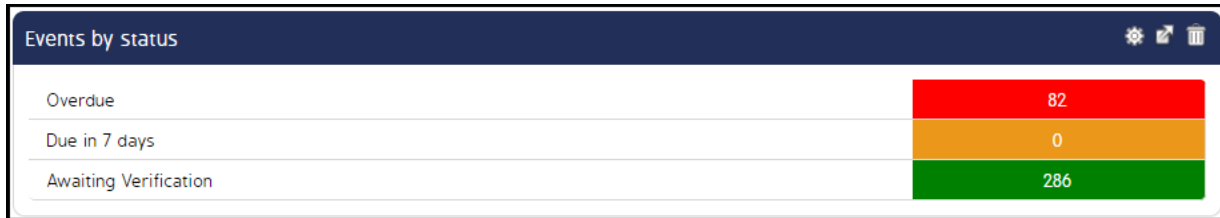
Color Scheme: Multicoloured

Length for line breaks: 40

You may breakdown events by Org Unit, Entity, Severity, Form, or Status. It offers the usual chart options. This can be used for many purposes. This widget needs to have a filter to select multiple Org Units. You get all or 1. When you get all, you see a repeat of Parent + Children.

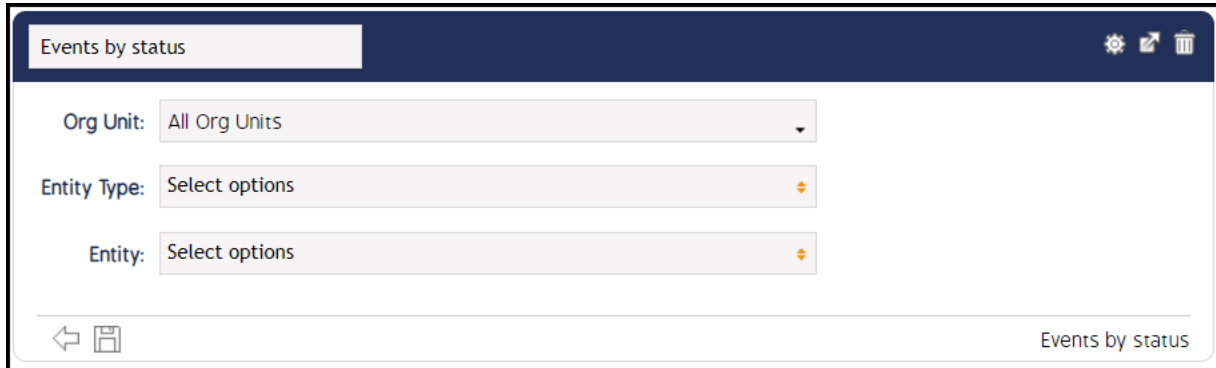
C. Events by Status Widget

This widget gives a breakdown of all events in 3 statuses: Awaiting Verifications, Due in 7 Days, and Overdue.



Status	Count
Overdue	82
Due in 7 days	0
Awaiting Verification	286

Filters/Configuration



Events by status

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Events by status

The only filters available here are the hierarchal filters. As a result you cannot filter by Event, or Date. Also the statuses displayed are invariable.

D. Events by Status Chart

Not sure? Not able to get this widget to display data...



Filters/Configuration

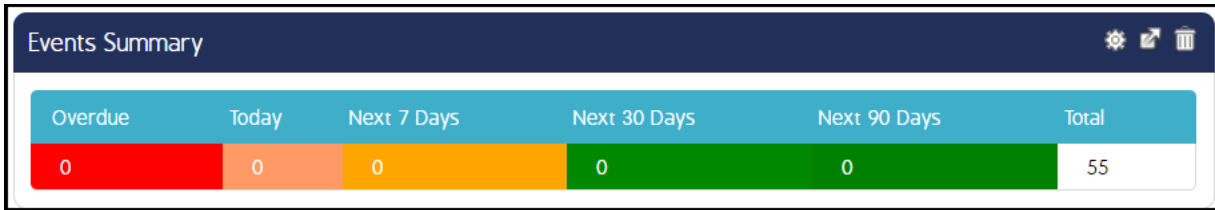
The screenshot shows the configuration panel for the "Events By Status Chart" widget. The header is dark blue with the widget title and the same three icons as the previous screenshot. Below the header, there are several filter and configuration options:

- View:** A dropdown menu with "All Events" selected.
- Org Unit:** A dropdown menu with "All Org Units" selected.
- Entity Type:** A dropdown menu with "All Entity Types" selected.
- Entity:** A dropdown menu with "Select options" displayed.
- Form:** A dropdown menu with "Select options" displayed.
- Status:** A dropdown menu with "Select options" displayed.
- Sub Status:** A dropdown menu.
- Past Due :** A text input field.
- Chart Type:** Radio buttons for "Pie" (selected) and "Columns".

At the bottom left, there are icons for back and save. At the bottom right, the text "Events By Status Chart" is displayed.

E. Events Summary Widget

This widget displays # of events in 5 statuses, as well as Total. The statuses are based on due date of the event. If the events have no due date, this widget may be of limited value.



Filters/Configuration

Events Summary

Org Unit: Airways Inc.

Entity Type: Select options

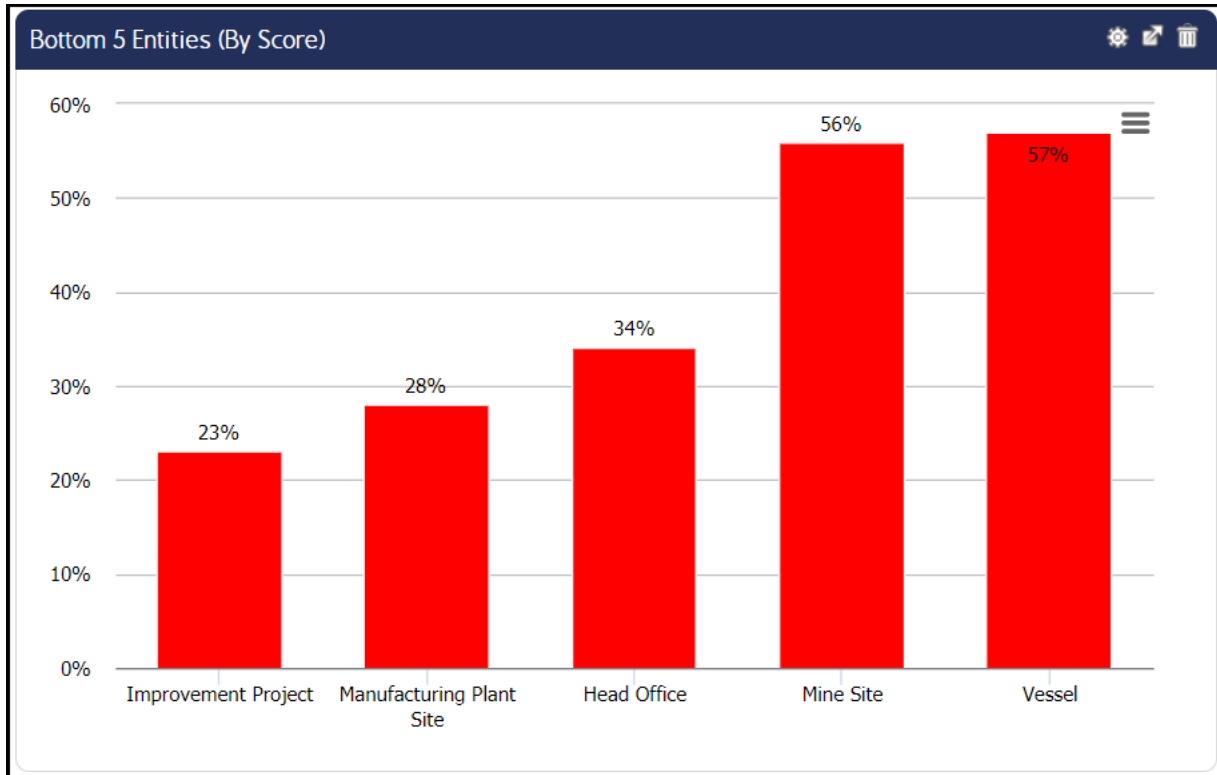
Entity: 6 selected

Events Summary

Only have hierarchy filters. You can't filter by Date or Event, and the display is invariable.

F. Bottom 5 Entities by Score

This widget displays the bottom 5 entities by score (by %). This could be your “Wall of Shame” chart. This chart is only of use if you are using scoring in forms.



Filters/Configuration

A configuration panel for the "Bottom 5 Entities (By Score)" widget. It includes several filter options:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Forms: All Forms
- Question Categories: All Categories
- Filter By: Event Date
- From Date: [Calendar icon]
- To Date: [Calendar icon]

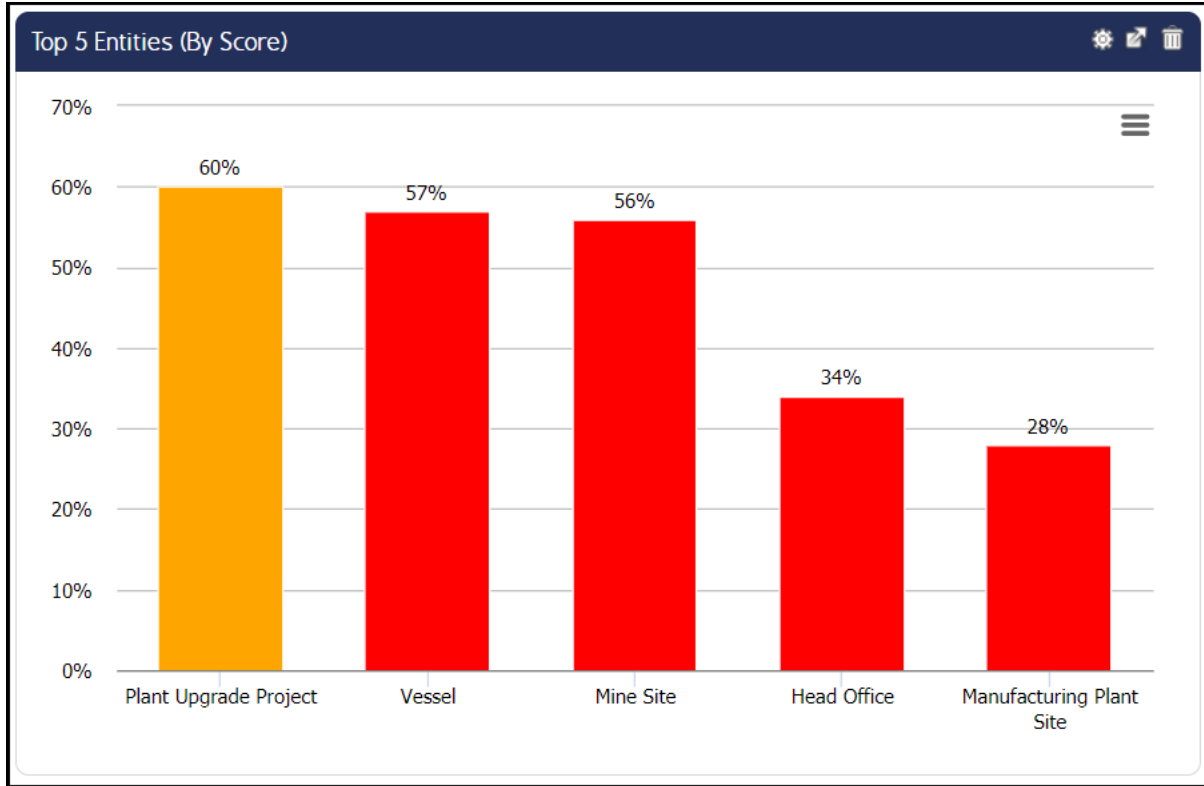
At the bottom, there are navigation icons (back and save) and the text "Bottom 5 Entities (By Score)".

You can filter by hierarchy or Form or even question category. Date filters are also available.

G. Top 5 Entities (by Score)

This widget is the reverse of the previous one.

Fyi- If you have less than 10 entities, some entities will display on both the top 5 and bottom 5 charts.



Filters/Configuration

A screenshot of the "Top 5 Entities (By Score)" configuration panel. The panel includes several filter options:

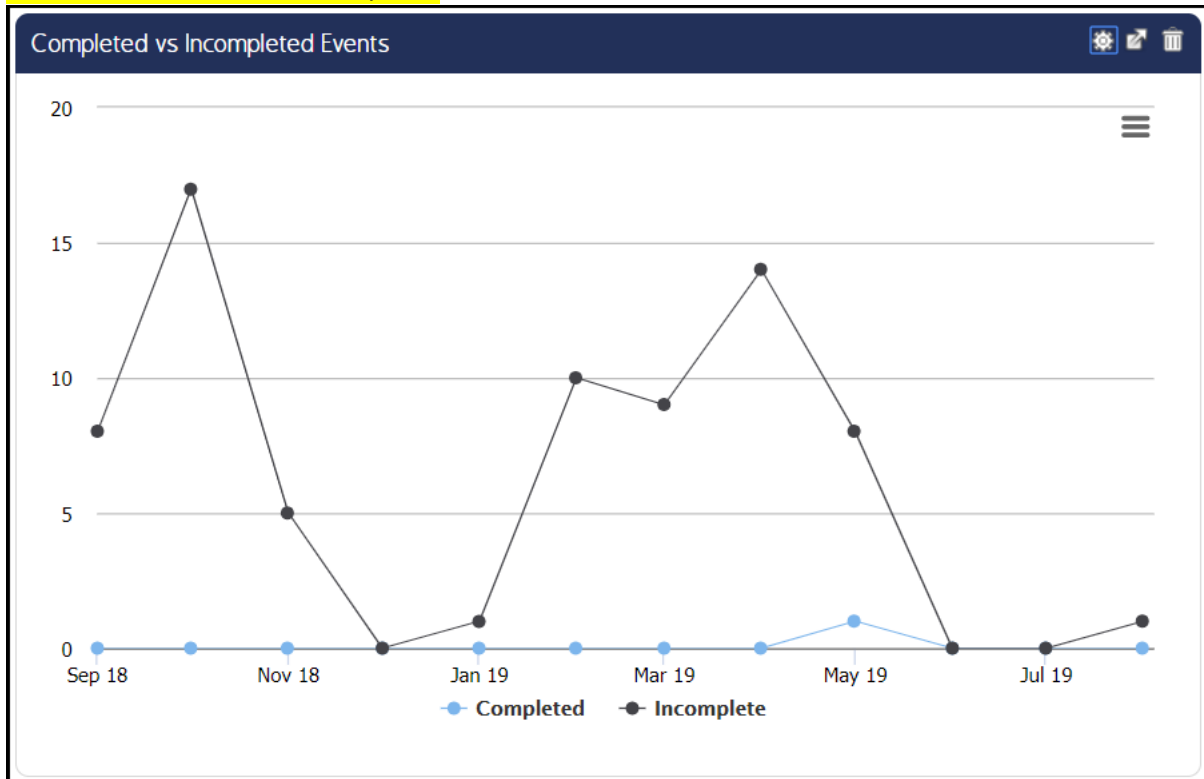
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Forms: All Forms
- Question Categories: All Categories
- Filter By: Event Date
- From Date: [Calendar icon]
- To Date: [Calendar icon]

At the bottom left, there are icons for back and save. At the bottom right, the text "Top 5 Entities (By Score)" is displayed.

You can filter by hierarchy or Form or even question category. Date filters are also available.

H. Completed vs. Incompleted Events

This widget displays 2 over imposed line graphs showing completed and incomplete events. The display is invariable. Also the shortage of filters makes this widget of limited value except in showing a very high level view of all events in the system.



Filters/Configuration

The configuration panel for the 'Completed vs Incompleted Events' widget includes the following filters:

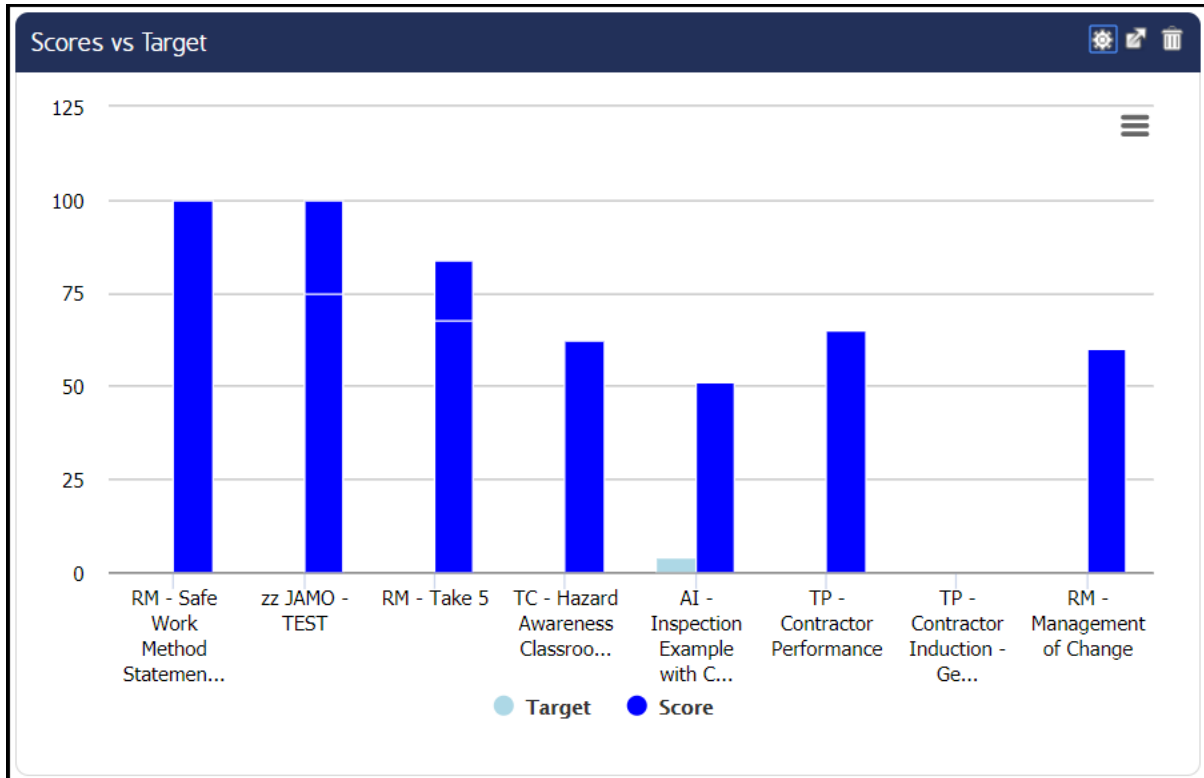
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options

At the bottom, there are navigation icons (back and save) and the widget title 'Completed vs Incompleted Events'.

Only hierarchal filters available. It would be more useful if there were an Event filter and some date filters.

I. Scores vs Target Widget

The widget is displaying a composite score for various forms versus the target.



Filters/Configuration



There are no filters, so the display is invariable. Where the Target comes from is questionable. It is also not clear which forms will display here or why. Therefore, not sure of the value of this widget.

J. Top 5 Types/Categories

Not able to get this widget to display data.



Filters/Configuration

A screenshot of the configuration panel for the 'Top 5 Types/Categories' widget. The panel has a dark blue header with the text 'Top 5 Types/Categories' and the same three icons as the widget header. Below the header, there are several filter controls:

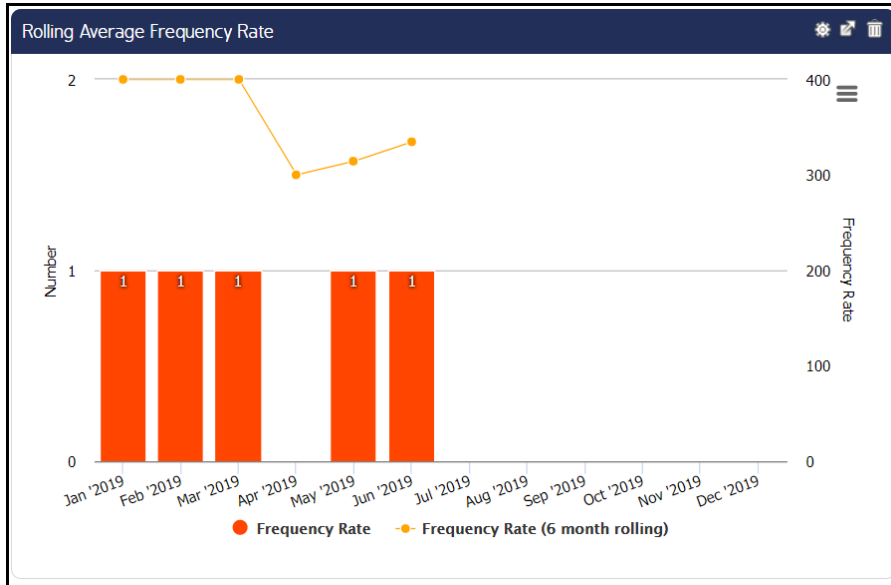
- Org Unit:** A dropdown menu with 'Contractors' selected and a red 'X' icon to its right.
- Entity Type:** A dropdown menu with 'Select options' selected.
- Entity:** A dropdown menu with '23 selected' selected.
- Form:** A dropdown menu with 'All Forms' selected.
- by:** A dropdown menu with 'By Category' selected.
- Filter By:** A dropdown menu with 'Event Date' selected.
- From Date:** A date field with '01 Aug 2015' and a calendar icon.
- To Date:** A date field with '14 Aug 2019' and a calendar icon.

At the bottom left of the panel, there are two icons: a left-pointing arrow and a save icon. At the bottom right, the text 'Top 5 Types/Categories' is displayed.

A good list of filters, yet I can't seem to get data to display.

K. Rolling Average Frequency Rate Widget

This widget displays the number of injuries as well as the rolling average frequency rate over a given period of time. For this to function you need to enter Hours Worked in the Frequency Rate module.



Filters/Configuration

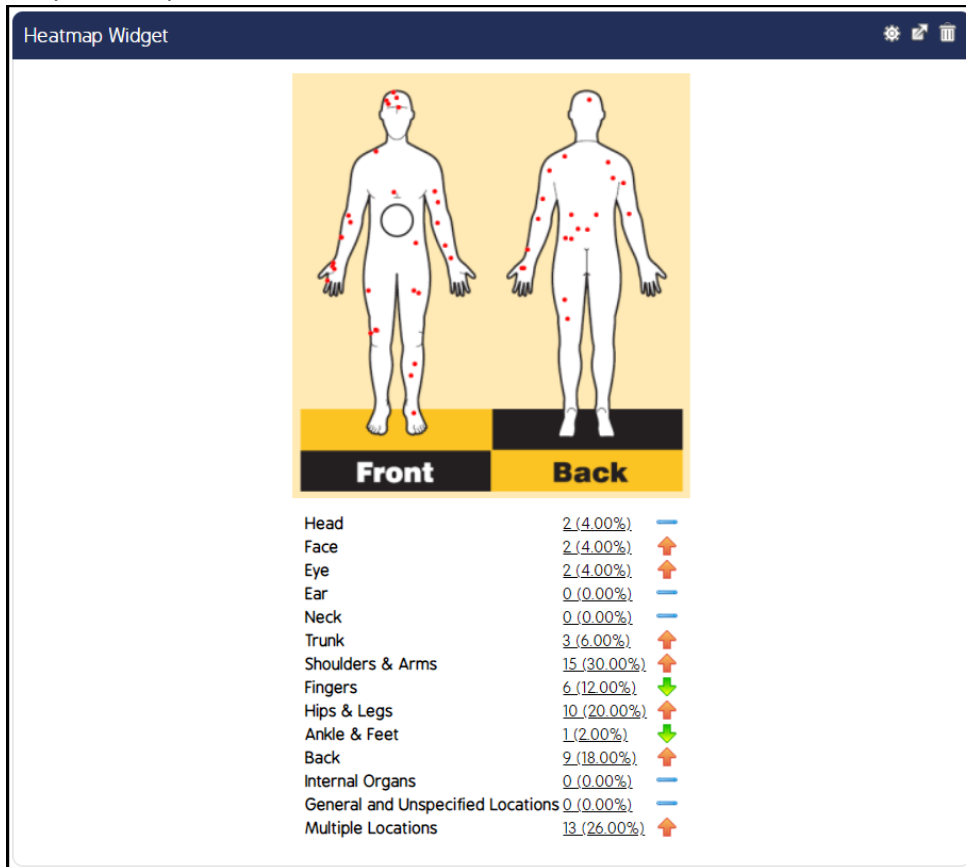
The configuration form for the Rolling Average Frequency Rate widget includes the following settings:

- By: By Category
- Org Unit: Crew
- Entity Type: Select options
- Entity: 1 selected
- Form: IM - Injury/Illness
- Event Status: 2 selected
- Classification: All Hours Worked
- Showing: Select Categories (Total)
- Category: Medical Treatment Injury (MTI)
- Show only one Event for multiple types and categories:
- Frequency Rate Category Description: Frequency Rate
- Target: +
- Rolling Period (months): 6
- No. of decimal places to display: 1
- Hours Worked Multiplier: 200000
- Risk Level: All Risk Levels
- Filter By: Event Date
- Rolling average calculation method: Average = Total Average of Period
- End month for period: May 2019
- Show Last 3 Months Rolling Average:
- Show Year to Date, not 12 month rolling:
- Show Period to Date, not 12 month rolling:
- Extend Rolling Average to end of X Axis:
- Frequency Rate Max Value for Scale: 100

You can run this widget with filters for the Org Unit, Entity, Form, Employee Classification, and Category. There are also numerous options for how to display the rolling average. Some experimentation may be useful to see the different results.

L. Heatmap Widget

This widget usually displays location of injuries on the body. It can also be used to show other things, such as location of injuries on a map. This would require more setup in the back end but is possible. The body heatmap comes standard.



Filters/Configuration

The configuration panel for the Heatmap Widget includes the following settings:

- Heatmap Source: Heatmap Image
- Heatmap Image: DefaultHeatmap.png
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Filter By: Event Date
- Date: Specify period
- From Date: 01 Aug 2015
- To Date: 14 Aug 2019

This widget works in conjunction with the Heatmap Response Type in the form configuration.

M. Top 5 Opportunities

This widget displays the top 5 questions with the largest # of responses. The below shows the sections that contain the questions that have the most responded questions. You can drill down into the section to get the Event Register list of the specific forms and drill down into them to see the responses.



Filters/Configuration

Top 5 Opportunities

Org Unit: Crew

Entity: 5 selected

Forms: All Forms

Question Categories: All Categories

Filter By: Event Date

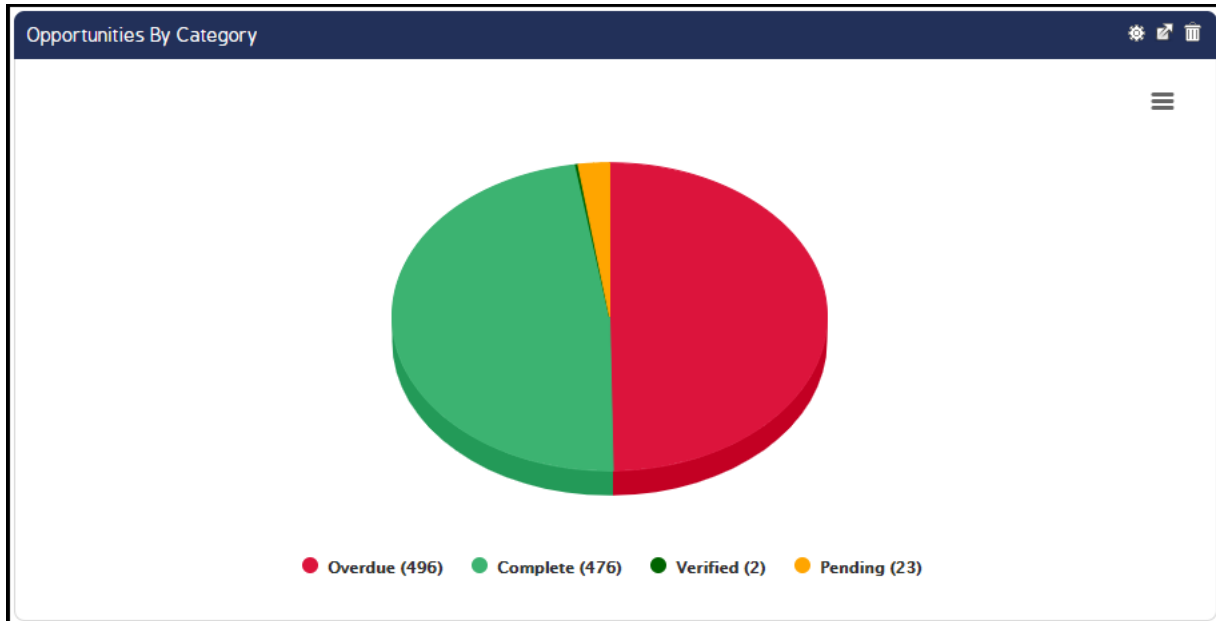
Date: Last 365 Days

Top 5 Opportunities

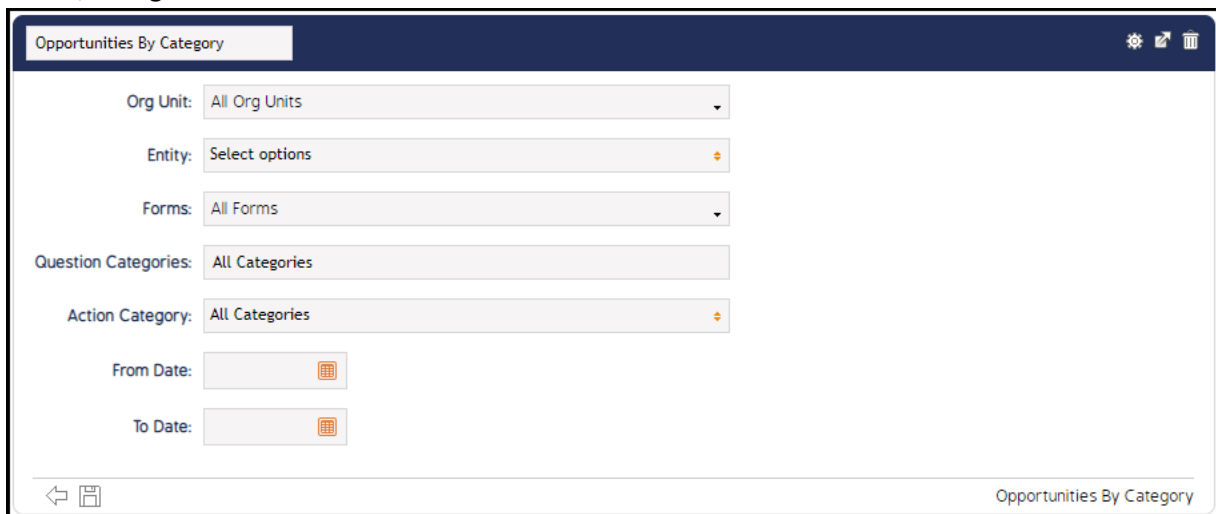
You have the hierarchal filters as well as date filters. There is a Question Category filter (only useful of course if using Question Categories).

N. Opportunities by Category

A better title for this widget might be **Actions by Status and Category**. This widget shows actions by status with a category filter.



Filters/Configuration



The "Filters/Configuration" panel for the "Opportunities By Category" widget includes the following settings:

- Org Unit: All Org Units
- Entity: Select options
- Forms: All Forms
- Question Categories: All Categories
- Action Category: All Categories
- From Date: [Calendar icon]
- To Date: [Calendar icon]

At the bottom left, there are icons for back and save. At the bottom right, the text "Opportunities By Category" is displayed.

There are hierarchal and date filters. The filters though that define this widget are the Action and Question Category filters.

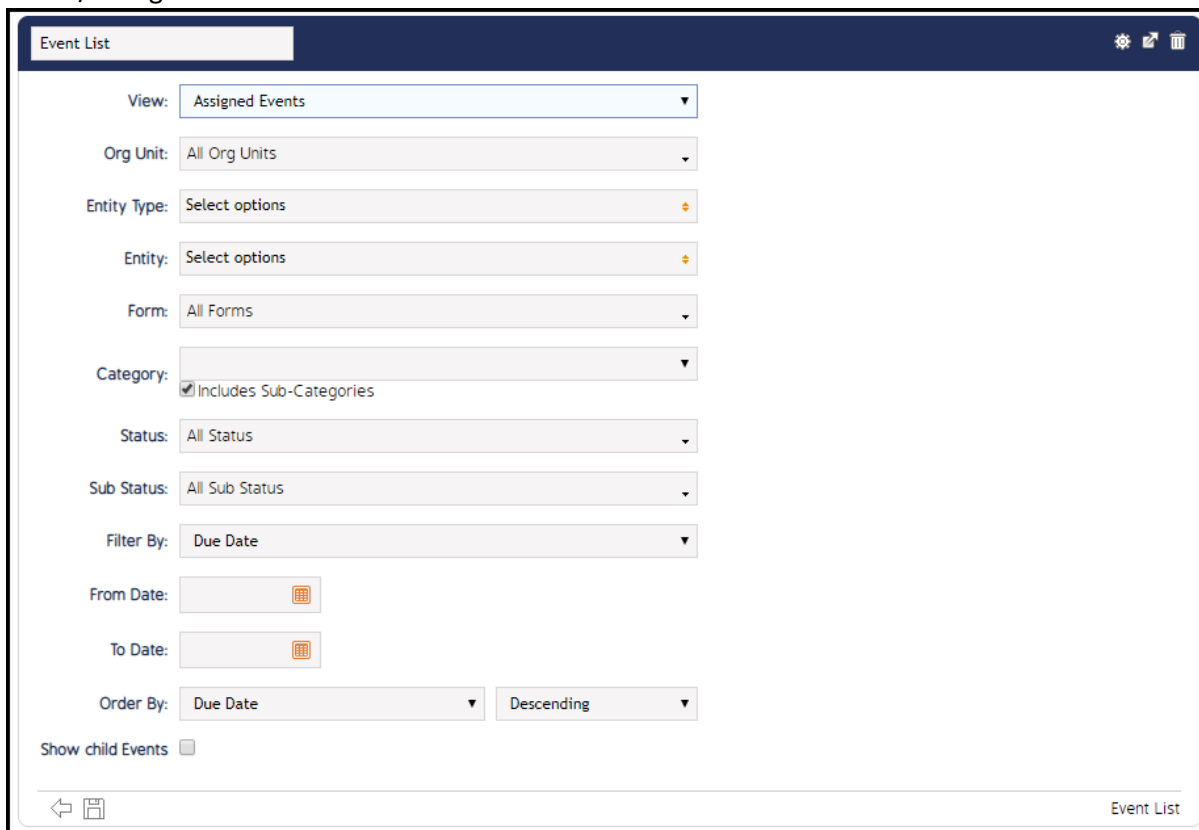
O. Event List

This widget is very popular. The user can see a listing of all events Assigned to them, Reported by them, or whose workflow is waiting for them. This can be a better alternative than having users refer to the Event register to search for these things.



ID	Entity	Form	Reporter	Due Date ↑	Actual Start	Status	Sub Status
201810044.0	Manufacturing Plant Site	zz HAZMAT Report	Gary2 Moelk		04 Oct 2018	Complete	-
201812317.0	ATL	zz HAZMAT Report	Gary2 Moelk		31 Dec 2018	Open - Draft	-
201906031.0	Mine Site	IM - Incident Report	Gary2 Moelk		03 Jun 2019	Open - Draft	-
201810311.0	5143	zz HAZMAT Report	Gary2 Moelk		31 Oct 2018	Open - Draft	-
201812205.0	Corporate	IM - Hazard Report	Gary2 Moelk		20 Dec 2018	In Review 2	-
201809139.0	Mine Site	zz HAZMAT Report	Gary2 Moelk		13 Sep 2018	Open - Draft	-
201809119.0	LONDON!!!!	zz HAZMAT Report	Gary2 Moelk		11 Sep 2018	Investigation Review	-
201812203.0	ATL	zz S&S Investigation	Gary2 Moelk		20 Dec 2018	Open - Draft	-
201901201.0	Improvement Project	IM - Hazard Report	Gary2 Moelk		20 Jan 2019	Open - Draft	-
201608023.1	Plant Upgrade Project	IM - Injury/Illness	Gary2 Moelk		02 Aug 2016	Open - Draft	-
201810042.0	Manufacturing Plant Site	zz HAZMAT Report	Gary2 Moelk		04 Oct 2018	Open - Draft	-

Filters/Configuration



Event List

View: Assigned Events

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Form: All Forms

Category: Includes Sub-Categories

Status: All Status

Sub Status: All Sub Status

Filter By: Due Date

From Date: [Calendar Icon]

To Date: [Calendar Icon]

Order By: Due Date Descending

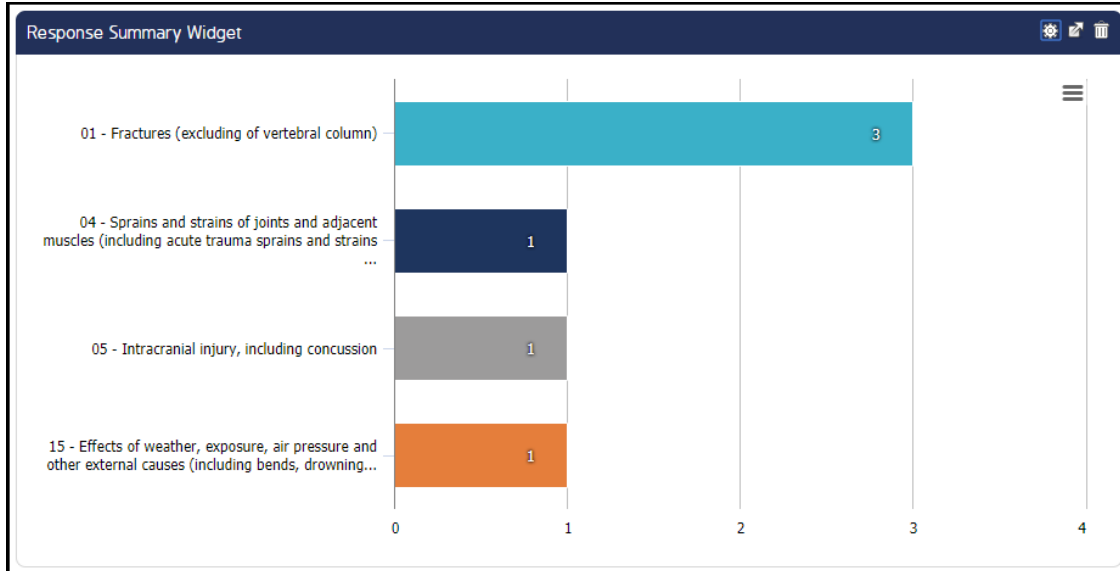
Show child Events

Event List

The View filter is the most powerful in displaying what would like be of interest to the User. Other filters are also quite useful. The form filter will only accept 1 form – better if it were multi-select for forms.

P. Response Summary Widget

The widget allows you to display counts of checkbox or radio button responses within a question



Filters/Configuration

The configuration screen for the "Response Summary Widget" includes the following settings:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Form: IM - Injury/Illness
- Category: All Event Categories
- Section: Injury/Illness Details
- Question: Nature of Injury
- Filter By: Event Date
- Date: Specify period
- From Date: 01 Aug 2016
- To Date: 14 Aug 2019

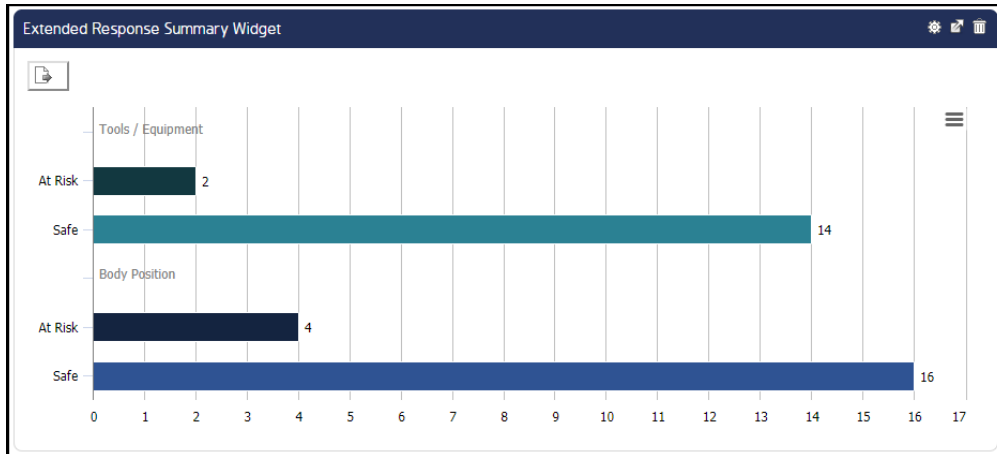
Parameters of Chart

- Display Widget As: Bar Chart
- Target (Bar and Column only): Show Legend (Pie and Donut Chart only), Show Data Labels
- Color Scheme: Multicoloured
- Length for line breaks: 40

You need to first select a Form filter and then the new filters in this widget are the Section and Question filters. As long as your Response Types are checkboxes or Radio Buttons, you will see a useful display of data.

Q. Extended Response Summary Widget

This widget can display responses from more than 1 question.



Filters/Configuration

Extended Response Summary Widg

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Form: H0.5 - Behaviour Based Safety Observation

Active: Section: Observation Remove

Question: Tools / Equipment

Answer: Safe, At Risk, Select Item

Active: Section: Observation Remove

Question: Body Position

Answer: Eyes on Path, Safe, At Risk, Select Item

ADD Section / Question / Answer

Date: Specify period

From Date: 01 Aug 2015

To Date: 01 Aug 2019

Filter By: Event Date

Display Widget As: Bar Chart

Parameters of Chart

Target (Bar and Column only):

- Show Legend (Pie and Donut Chart only)
- Show Data Labels
- Show Question

Color Scheme: Monochrome

Length for line breaks: 20

The important filters here are to select the Section, Question, and Answers you want to display. Also you need to click the button Add section to add more than one question. Text boxes don't display their contents. This works well to count #s of checkboxes or radio buttons.

R. New Event Widget

This is the same widget as the one listed above under Workflow Widgets. It allows you to create events via a shortcut, using only the Simple popup initial form.



Filters/Configuration



The only filter available is to select any or all of the existing forms.

S. Key Risk Indicators

This widget allows you to count things like # of Events, Actions, Findings, or even Event Categories. You can then compare this period with the previous to see if there is an upward or downward trend.

Key Risk Indicators				
	Prev	Curr	Target	Trend
Injuries	25	37	30	↑
Findings (All Categories)	0	2		↑
Actions (All Action Levels)	16	26		↑
Extreme Findings	0	0		○
Audits Completed	3	7	5	↑

Filters/Configuration

Key Risk Indicators	
KRI Name	Type
Injuries	Events
Findings (All Categories)	Finding Category
Actions (All Action Levels)	Action
Extreme Findings	Current Risk Level
Audits Completed	Events

Filters/Configuration – 2

Key Risk Indicator

Name: Injuries

Target: 30.00

Aim to: Not Reach Target

Type: Events

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Filter By: Event Date

Period: Specify period

From Date: 01 Aug 2015

To Date:

Form: IM - Injury/Illness

Event Category: Medical Treatment Injury (MTI), First Aid Injury (FAI), Lost Time Injury (LTI), Restricted Work Injury (RWI)

Percent Completed on Time

Status: Select options

Sub Status:

Save | Cancel

Need a date filter (Year to Date) with the Previous being same period in previous year. Once configured, you may need to refresh the screen to get the results to update.

T. Location based Summary

This is the same widget as under the Workflow widgets. This widget can show a map with all your locations shown on it. However, for this to work there is configuration that needs to be done and the GPS coordinates of all your locations need to be listed in the Entity records.



Filters/Configuration



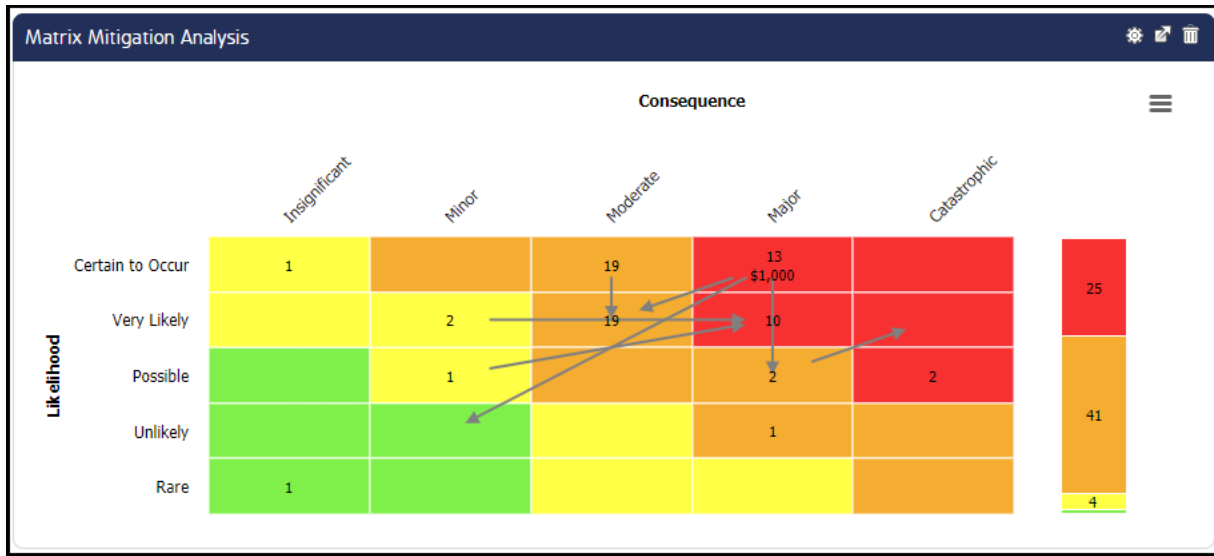
U. Billing Widget

This widget is no longer used.

Billing Widget	⚙️ ↗️ 🗑️	
Org Unit	Actual Cost	Budget
Operations		
Australia Pacific Operations		
Australian Operations		
New Zealand Operations		
North America Operations		
US Operations		
Europe, Middle East and Africa (EMEA) Operations		
European Operations		
African Operations		
Projects		
Manufacturing Projects		
Major Projects		
Maintenance		

V. Matrix Mitigation Analysis

This widget displays a “heatmap” of actual risk. It is not clear what the arrows are showing. Also when a risk changes in a Finding, this chart does NOT update.



Filters/Configuration

The configuration panel includes the following filters:

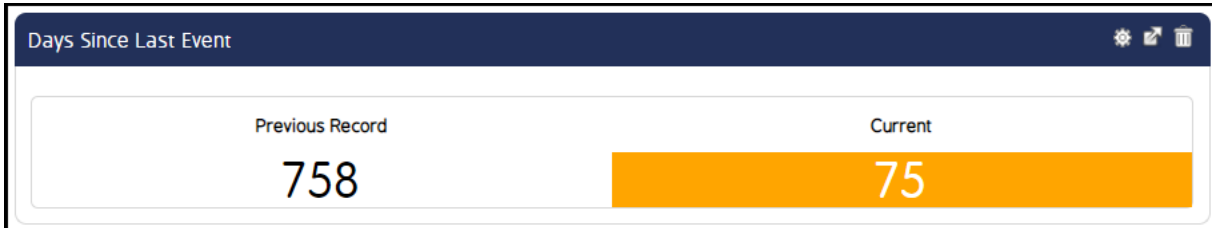
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Source: Finding Framework
- Process: All Processes

Matrix Mitigation Analysis

The filters are largely hierarchal although this can be run for Findings or Risks as well.

W. Days Since Last Event

This is a popular widget that counts days since the last event. You can use this for Days since last Injury, or Lost Time Injury, or any event that you want to highlight. You would only need to create a category and assign the category to a response that defines your “Event”.



Filters/Configuration

The configuration screen includes the following filters and options:

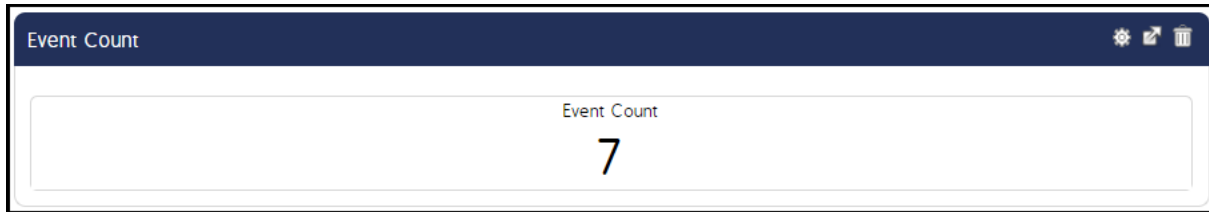
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Form: IM - Injury/Illness
- Showing: Select Categories (Total)
- Category: Medical Treatment Injury (MTI)
- Date: Event Date
- Target: Show

Navigation icons (back, save) are located at the bottom left, and the widget name 'Days Since Last Event' is at the bottom right.


There are the usual hierarchy and date filters. The key filters here though are the Form (where you are tracking your “Event”), “Showing” where you define whether you want to define specific Categories (which you almost undoubtedly would want to do), and the Category(ies) that you are tracking.

X. Event Count

This widget will show a count of events. You define in the filters which event you want to count and the date range.



Filters/Configuration



The image shows the configuration interface for the "Event Count" widget. It features a dark blue header with the title "Event Count" and three icons (gear, refresh, trash) on the right. Below the header, there are several filter options, each with a label and a dropdown menu:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Form: IM - Injury/Illness
- Showing: All Categories
- Status: All Status
- Color table: None
- Filter By: Event Date
- Date: Last 365 Days

At the bottom left, there are two icons: a left-pointing arrow and a document icon. At the bottom right, the text "Event Count" is displayed.

You have the usual hierarchy and date filters. The key filters for this widget are **Form**, where you define which Event you want to count, "**Showing**" where you decide whether you want to count certain Categories, and **Status**, so you can count only Closed events for example.

Y. Individual / Party Involved Scoreboard

The widget displays a count of how many times a user or Job Title was listed in a Party Involved field. You may specify the Involvement Type or leave it open ended as all Involvement Types.

Individual / Party Involved Scoreboard	
Involvement Type	
Gary Moelk	6
Aaron Brown	6
Gary2 Moelk	5
Chad Hanks	4
Jeff Wright	3
Graham General	2
Jim Montgomery	2
Dan Johnston	2

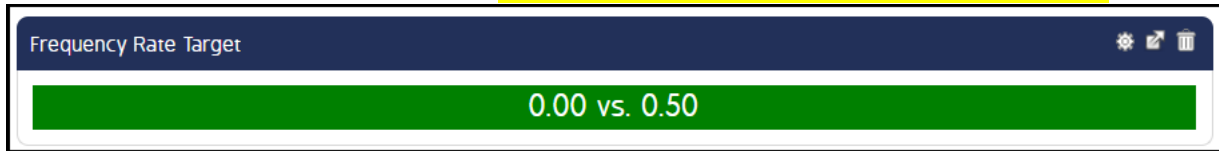
Filters/Configuration

Individual / Party Involved Scoreboa	
<input type="radio"/> Reporter <input checked="" type="radio"/> Involvement Type	
Show for:	1 selected
Filter	
Status:	All Status
Org Unit:	All Org Units
Entity Type:	Select options
Entity:	Select options
Form:	All Forms
Category / Type:	Select options
Job Titles:	All Job Title
View	
Controlled Parameter:	User
Display type:	Table
Color table:	Red
The number of rows:	8
Individual / Party Involved Scoreboard	

You have the normal hierarchy filters. **There are no Date filters in this widget.** The key filters: **Show For** allows you to specify Involvement Type. **Form** allows you to look at a single form. **Controlled Parameter** allows you to list Names or Job Titles.

Z. Frequency Rate Target

This widget displays your Target compared with your actual FR. If the display bar is green, it means that your actual FR is less than the target FR. **The Actual FR does not seem to be populating... ???**



Filters/Configuration



The image shows a configuration form for the "Frequency Rate Target" widget. The form is titled "Frequency Rate Target" and includes several fields for filtering and configuration:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Form: IM - Injury/Illness
- Event Status: Select options
- Category: Medical Treatment Injury (MTI)
- Hours Worked Multiplier: 200000
- Target: 0.5
- Filter By: Event Date
- Period: Year To Date With Current Month
- Rolling average calculation method: Average = Total Average of Period

At the bottom of the form, there are navigation icons (back and save) and the text "Frequency Rate Target".

You have the normal hierarchy filters. You would also then enter the Form and the Category(ies) that are used in your FR. The key filter here is the Target filter. **The system should calculate the Actual FR and do the comparison. It is not currently doing this.**

AA. Key Performance Indicator

This widget can be configured to display KPIs that you have configured into forms and have categories embedded in these forms to track counts of the KPIs, such as # of First Aids, or Injuries. You could also track things like # of a certain audit form completed. The %s only display if your forms have Scoring set up and will display % of target score.

KPI Name	Target	Curr	Avg %	Prev	Avg Prev %	KPI Avg %	Variance
First Aids	5	0		0			-5
Injuries	3	6		2			3
Agency Visits Conducted	10	7		3			-3

Filters/Configuration

Key Performance Indicator

Chart Mode is enabled:

Target:

Curr:

Avg %:

Prev:

Avg Prev %:

KPI Avg %:

Variance:

Turn On/Off Columns:

KPI:

- KPI Name
- First Aids
- Injuries
- Agency Visits Conducted

Click to add a new KPI

Click the KPI + to add a new KPI.

KPI

*Name:

Target:

Org Unit:

Entity Type:

Entity:

Filter By:

Period (days):

Form:

Event Category:

Status:

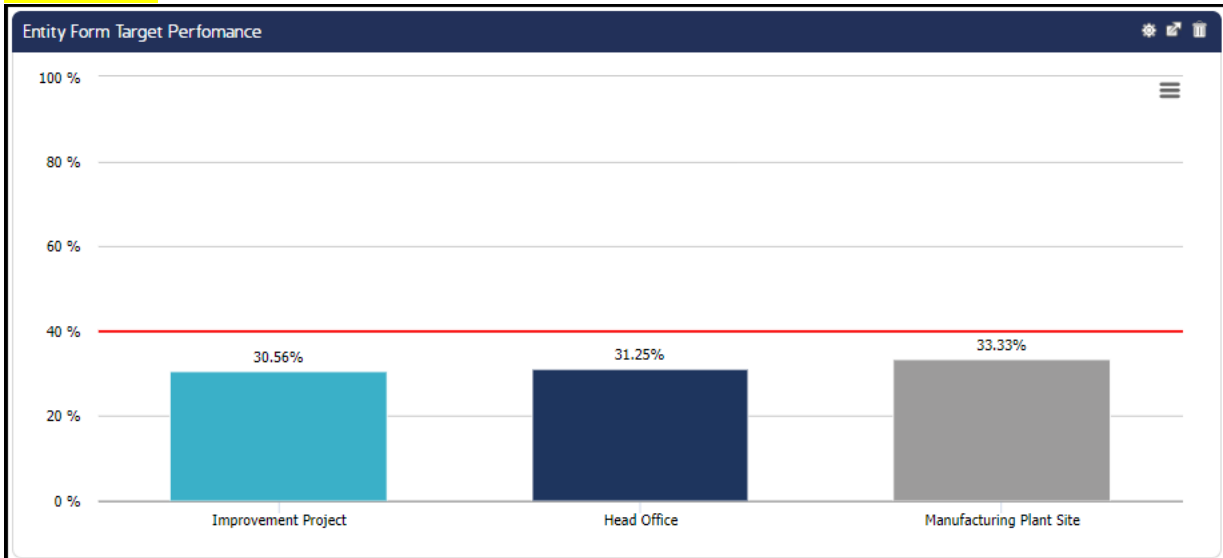
Sub Status:

Save Cancel

Add your KPI name and the form and category (if needed) you want to measure. In the Date filter it would be useful to have Current Month and Current Year to Date.

BB. Entity Form Target Performance

This form displays Entities that are below the target you set within this widget. The performance is based on ???



Filters/Configuration

The configuration panel includes the following settings:


- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Forms: All Forms
- Filter By: Event Date
- Period (days): Specify period
- From Date: 01 Aug 2015
- To Date: 15 Aug 2019
- Target: 40

Navigation icons (back, save) are located at the bottom left, and the widget title 'Entity Form Target Performance' is at the bottom right.

You have your normal hierarchy and Date filters. You can also select a Form. The key filter here is your Target.

CC. Event Filling Tasks

This widget displays ... ???



The screenshot shows a widget with a dark blue header bar containing the text "Event Filling Tasks" and three icons (a gear, a square with an arrow, and a trash can). Below the header is a table with a teal background and two columns labeled "Event" and "Name".

Event	Name
-------	------

DD. Find Event Info

This widget allows you to do a search on events by inputting an Event ID or a Date.

Find Event info ⚙️ 📄 🗑️

201810171 🔍

Event

Org Unit: Human Resources
Entity: Head Office
Form: zz JAMO - TEST
Reporter: John C
Actual Start: 17 Oct 2018

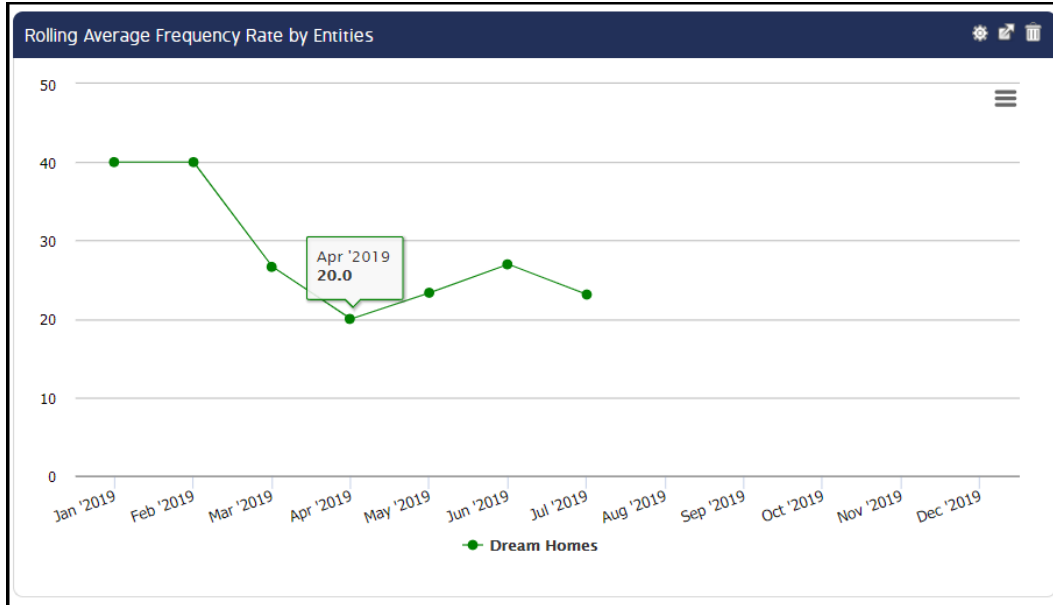
Actions

ID: 5840
Action Category: All Action Categories
Description: test change responsible
Due Date: 17 Oct 2018

There is no other configuration available for this widget.

EE. Rolling Average Frequency Rate by Entities

This widget allows you to track the rolling average frequency rate of a single or multiple entities



Filters/Configuration

Form: IM - Injury/Illness

Event Status: 2 selected

Classification: All Hours Worked

Category: Medical Treatment Injury (MTI)

Total Category Frequency Rate Description: Frequency Rate

Target: +

Rolling Period (months): 12

No. of decimal places to display: 1

Hours Worked Multiplier: 200000

Risk Level: All Risk Levels

Filter By: Event Date

End month for period: Current 2019

Show Last 3 Months Rolling Average

Show Year to Date, not 12 month rolling

Frequency Rate Max Value for Scale:

Rolling average calculation method: Average = Mean of Monthly Average

Name: Dream Homes

Color: [Green]

Org Unit: Crew

Entity: 1 selected

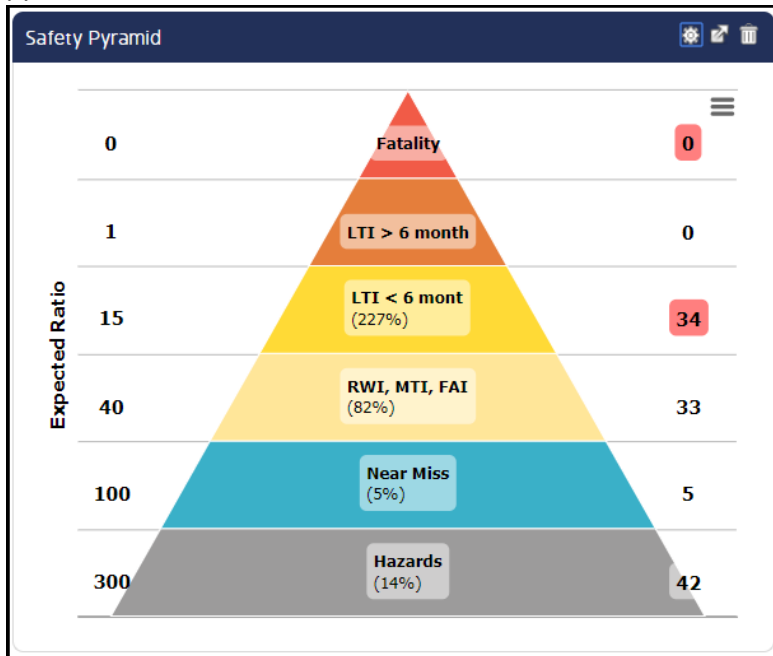
Remove

ADD

Add your Form and Category filters, then add the Hours Worked multiplier (200,000 in the US). You then add the Entity in the bottom of the screen. Add as many as you need by clicking the Add button.

FF. Safety Pyramid

This widget displays the traditional Safety stats in pyramid format with the Target #s in the left-hand column and the actual #s in the right. You can configure the items you want to show for each level of the pyramid.



Filters/Configuration

The Filters/Configuration interface includes the following settings:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Filter By: Event Date
- Date: Specify period
- From Date: 01 Aug 2015
- To Date: 16 Aug 2019
- Invert Pyramid:
- Show Expected Ratio:
- Show Actual Performance:

Level Configuration table:

Name	Target	Color	Move
Hazards	300	Grey	Down Arrow
Near Miss	100	Blue	Up/Down Arrows
RWI, MTI, FAI	40	Yellow	Up/Down Arrows
LTI < 6 mont	15	Light Yellow	Up/Down Arrows
LTI > 6 month	1	Orange	Up/Down Arrows
Fatality	0	Red	Up Arrow

Click the cog wheel to configure each level.

Safety Pyramid (cont.)

Name your level, set a color and target. Then select your form and the category(ies) you want to track in this level. You can select the Classification (Employee or Contractor) if you want to distinguish between the classifications. You may add a level by clicking the green + icon on the previous screen, or delete by clicking Cog Wheel > Delete.

Safety Pyramid

Active:

*Name:

*Color:

*Target:

Form:

Category:

-
-
-
-
-
-

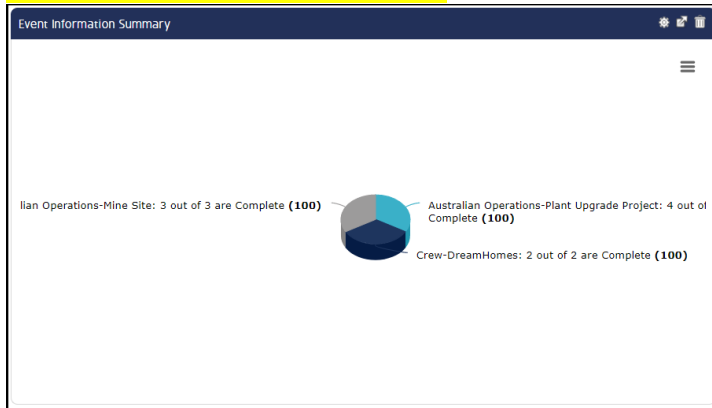
Event Type:

Classification:

Days Lost included in calculation:

GG. Event Information Summary

This widget displays a summary of events, depending on the filters set. The Graph display seems to show different data than the Table display.



Graph View

A table titled 'Event Information Summary' with four columns: Section, Assign, Response, and Received. The table lists various categories of events and their corresponding counts.

Section	Assign	Response	Received
Injury/Illness			
Injured/ill Person	20	20	12
Injury/Illness Details	17	18	5
Days Lost / Restricted	0	0	0
Certificates / Doctor's Notes			
Return to Work (RTW) Plans			
Close Out	2	2	2

Table View

Filters/Configuration

A configuration panel for the 'Event Information Summary' widget. It contains several filter settings and a 'Parameters of Chart' section.

Filters:

- View: Assigned Events
- Org Unit: All Org Units
- Entity Type: All Entity Types
- Entity: Select options
- Form: IM - Injury/Illness
- Category: Select options
- Finding Categories: [Dropdown]
- Event Status: All Status
- Show finding category as additional columns
- Category Title: [Text Input]
- No Response Title: [Text Input]

Parameters of Chart:

- Display Widget As: Table
- Target (Bar and Column only):
 - Show Legend (Pie and Donut Chart only)
 - Show Data Labels
- Color Scheme: Multicoloured
- Length for line breaks: 40

You have the normal hierarchy filters. There are no date filters. You need to select a Form.

HH. PHAIR Widget

It is an Event metric widget that calculates and displays **PHAIR** (Potential for Harm over All Injuries Ratio) and **NMEFR** (Near Miss Events Frequency Rate) of a company.

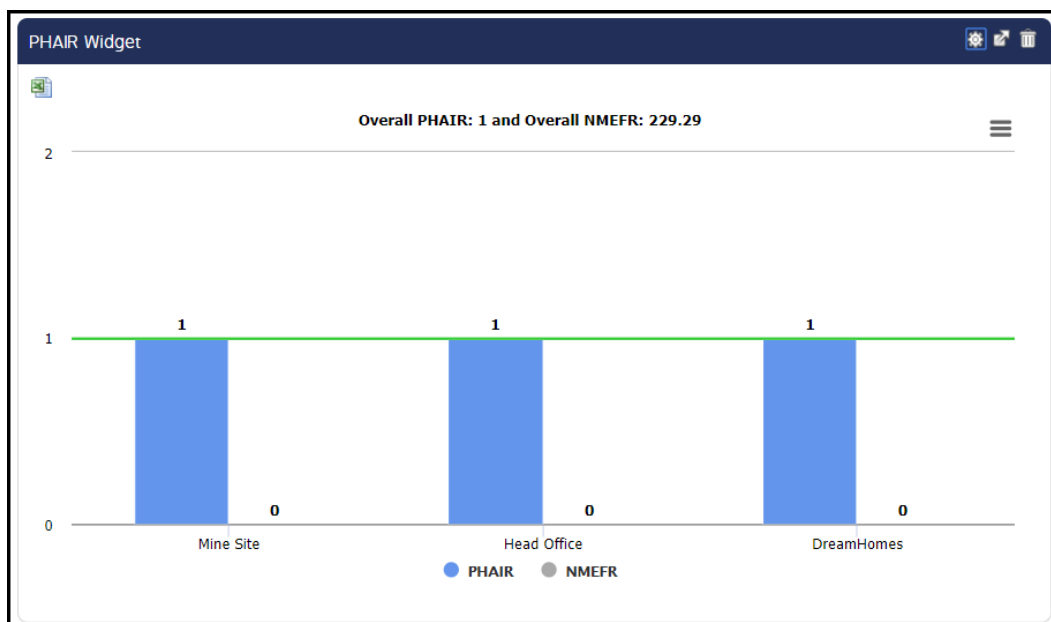
1. Add a PHAIR widget

All the widgets including PHAIR widget are located in Dashboard module.

1.1 Steps to add PHAIR widget:

1. Go to **Dashboard** module.
2. Click **Add Widget**.
3. From the **Select Widget** window, choose Event and scroll down to find the PHAIR widget.
4. Select the widget and click **OK** to add it to the Dashboard.

The look of the following image is an example of PHAIR widget after configuration.



2. Configure PHAIR Widget

The user can configure this widget according to the configuration fields in the settings window.

2.1 Steps to configure widget:

1. Click the cog wheel located at the top right of the widget.
2. Fill in the fields as shown in the following image.

3. Click **Save**.

The following table helps the user to understand the input that has to be entered in the fields for configuring the widget.

S. No	Fields	Description
1	Company	Allows to filter Events and hours worked for which PHAIR has to be calculated.
2	Org Unit	Allows to filter Events and hours worked for which PHAIR has to be calculated.
3	Entity Type	Allows to filter Events and hours worked for which PHAIR has to be calculated.
4	Entity	Allows to filter Events and hours worked for which PHAIR has to be calculated.
5	Form	Allows to filter Events for which PHAIR has to be calculated.
6	PHAIR Numerator Event Categories	It is a type of filter for Event Categories. It will be used to calculate number of events.
7	PHAIR Numerator Multiple Event Categories	It is a type of filter for Event Categories. It will be used to calculate number of events.
8	PHAIR Denominator Event Categories	It is a type of filter for Event Categories. It will be used to calculate number of events.
9	NMEFR Numerator Event Categories	It is a type of filter for Event Categories. It will be used to calculate number of events.
10	Group by	Allows to define how to group result for these events.

11	Target PHAIR	It is a target value which is shown as a green line on the chart.
12	NMEFR Multiplier	It is a value which is used in the formula to calculate individual and overall NMEFR.
13	Date	Allows define a date range for which we should make calculation.
14	Show empty intervals of X-Axis	It's a check box to control if metrics with 0 value is visible or not on graph and in the report

3. PHAIR Widget Calculations

The PHAIR widget calculates the results according to the following formulae.

3.1 Group by Entity:

For PHAIR

Formula:

Overall PHAIR = (Total Hazards + Total Near Miss) / Total Injuries

- **Total Hazards:** Number of Events with any Entity and selected PHAIR Numerator Event Categories.
- **Total Near Miss:** Number of Events with any Entity and all selected PHAIR Numerator Multiple Event Categories.
- **Total Injuries:** Number of Events with any Entity and selected PHAIR Denominator Event Categories.
- Similar for group by **Org Unit / Entity Type**. just Events must have Org Unit / Entity Type.

For NMEFR

Formula:

Overall NMEFR = (NMEFR Multiplier * count of events for all objects shown in x-axis and selected "NMEFR Numerator Event Categories" and met other criteria selected in widget) / (sum of hours worked which met criteria and related to objects shown in x-axis).

- **NMEFR Multiplier:** By default, NMEFR Multiplier = 1000000.
- **Total Hours Worked:** Sum of Hours Worked for selected Entities.

3.2 Per Org Unit / Entity / Entity Type:

PHAIR = (Total Hazards + Total Near Miss) / Total Injuries.

NMEFR = Total Near Miss * Multiplier / Total Hours Worked.

- **Total Hazards:** Number of Events for particular Entity / Org Unit / Entity Type and selected PHAIR Numerator Event Categories.
- **Total Near Miss:** Number of Events for particular Entity / Org Unit / Entity Type and all selected PHAIR Numerator Multiple Event Categories.
- **Total Injuries:** Number of Events for particular Entity / Org Unit / Entity Type and selected PHAIR Denominator Event Categories.
- **Total Hours Worked:** Sum of Hours Worked for particular Entity / Org Unit / Entity Type.

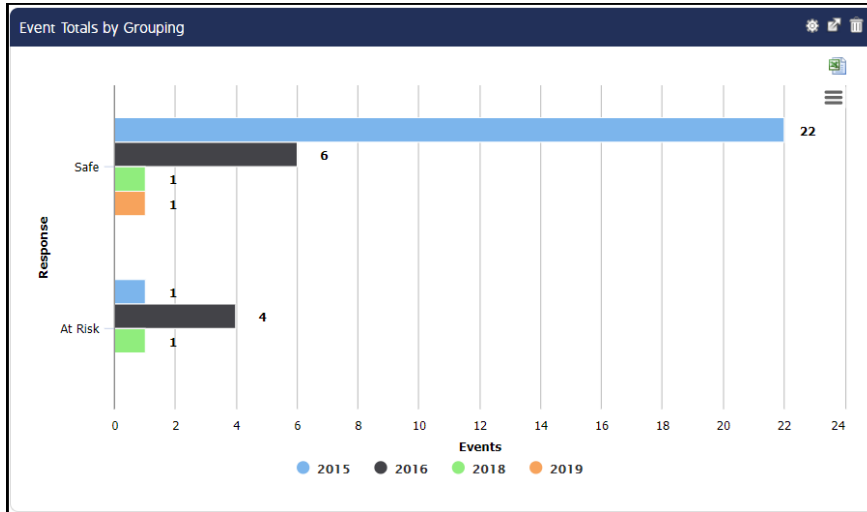
NOTE:

- Total Near Miss in both cases (PHAIR and NMEFR) is the same.

- There is difference between **Overall** and **per Entity / Org Unit / Entity Type** values of **PHAIR** and **NMEFR** i.e. **NMEFR Numerator Event Categories** is not used when we calculate **NMEFR per Entity / Org Unit / Entity Type**.

II. Event Totals by Grouping

This widget shows counts of whatever you want to count, by date, by org unit, by entity. This is a very useful widget with a variety of uses. Below are shown 2 views that might be used for Behavior-based Safety reporting.



Filters/Configuration

The configuration interface for the 'Event: Totals by Grouping' widget includes the following settings:

- Org Unit: Contractors
- Entity Type: test
- Entity: Select options
- Form: All Forms
- Classification: Select options
- Person Involved: Select Users
- Event Status: All Status
- Date: Specify period
- From Date: 01 Jan 2015
- To Date: 16 Aug 2019
- Filter By: Event Date
- Display Widget As: Bar Chart

Parameters of Chart

- Target (Bar and Column only):
 - Show Legend
 - Show Data Labels
 - Show Question
- Length for line breaks: 40
- X-Axis Group By: Response

Active:

- Section: Observation
- Question: Body Position
- Answer: 2 selected

Order By: None

Show warning message if count of x-axis values exceed threshold: 50

Series Group by is Date.

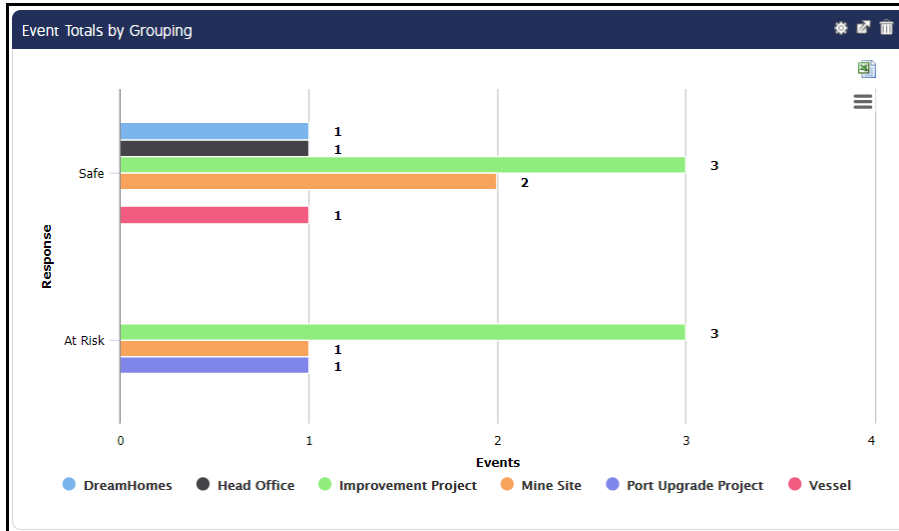
Period Type: Year

Show empty intervals on X-Axis:

Series Group by is Date.

Event Totals by Grouping (cont.)

Here is another view this widget can give:



Filters/Configuration

The configuration panel includes the following settings:

- Org Unit: All Org Units
- Entity Type: All Entity Types
- Entity: Select options
- Form: H&S - Behaviour Based Safety Observation
- Classification: Select options
- ADD Section / Question / Answer
- Person Involved: Select Users
- Event Status: All Status
- Date: Specify period
- From Date: 01 Jan 2016
- To Date: 16 Aug 2019
- Filter By: Event Date
- Display Widget As: Bar Chart
- Parameters of Chart
 - Target (Bar and Column only):
 - Show Legend
 - Show Data Labels
 - Show Question
 - Length for line breaks: 40
 - X-Axis Group By: Response
- Active:
- Section: Observation
- Question: Body Position
- Answer: 3 selected
- Remove

Order By: None

Show warning message if count of x-axis values exceed threshold: 50

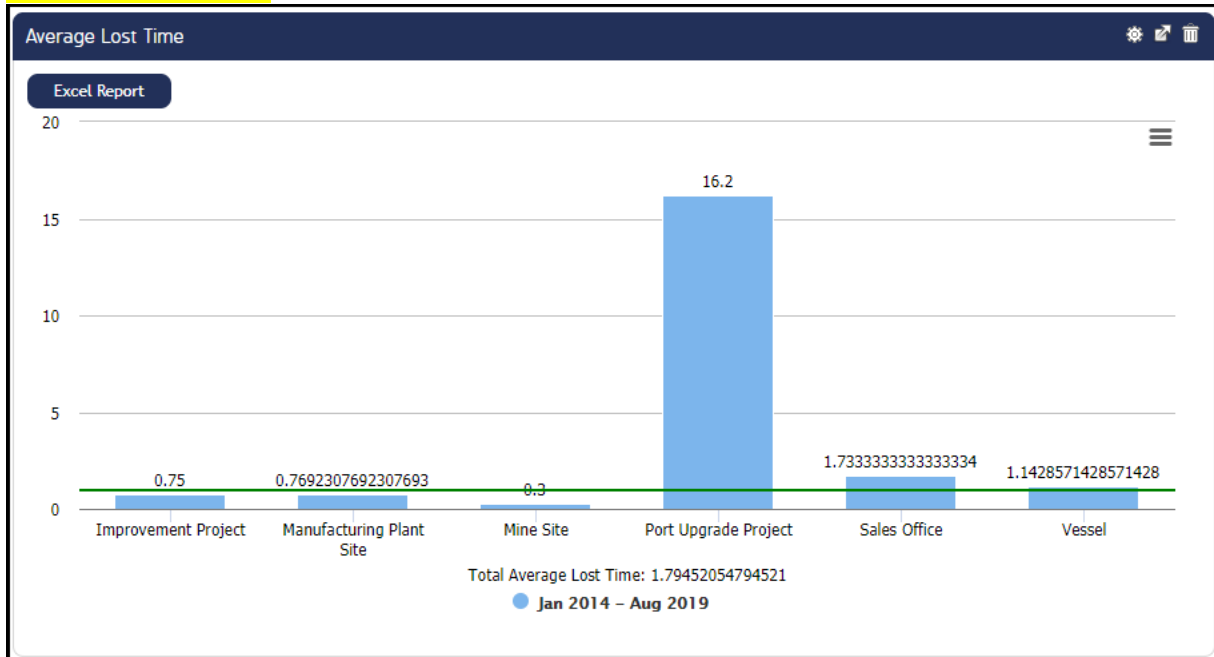
Series Group By: Entity

Show empty intervals on X-Axis: ...

The only difference in the config between this chart and the one above is in the **Series Group By** field is **Entity**.

JJ. Average Lost Time

This widget shows ... ?



Filters/Configuration

Average Lost Time

Excel Report

Org Unit: All Org Units

Entity: Select options

Entity Type: Select options

Group by: Entity

Date: Specify Period in Months

From Month: January

Year: 2014

To Month: August

Year: 2019

Also return results for previous equivalent period

Target: 1

Denominator Forms: 1 selected

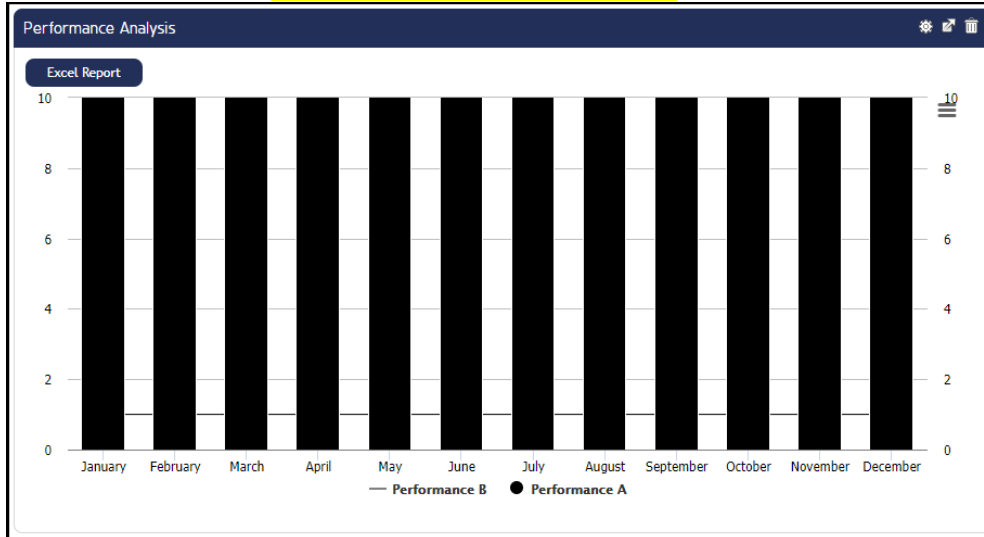
Denominator Event Categories: Select options

Average Lost Time

You have the usual Hierarchy and Date filters. You also have a Target field and the ability to select the Form where your Lost Time info is collected. You can also export the data from this graph to an Excel spreadsheet

KK. Performance Analysis

This widget displays... I'm not at all sure what it displays.



Filters/Configuration

The configuration panel for Performance Analysis includes the following settings:

- Excel Report: Filter (+)
- Period Type: 12 Months
- Data Series: Performance B (Line, Color: Black), Performance A (Column Chart, Color: Black)
- First Axis Max Value: 10
- Second Axis Max Value: 10

A red arrow points to the Performance A data series configuration.

Filters/Configuration 2

The configuration panel for Performance A includes the following settings:

- Name: Performance A
- Color: Black
- Calculation: Num 1 (Numerator, Event), Den 1 (Denominator, Event), Weighting (Weighting, Event)
- Display By: Column Chart
- Show Trend: Linear
- Moving Average: 5 Days
- No. of decimal places to display: 3
- Show Data Labels: Checked
- Show on Second Axis: Checked

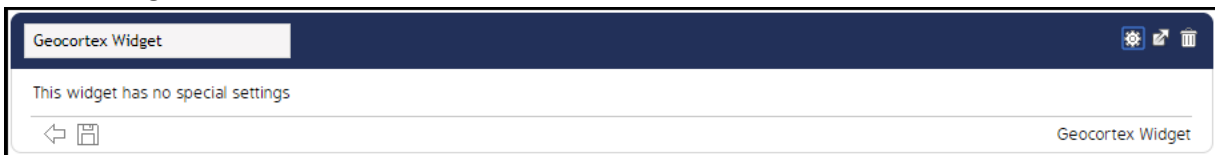
Buttons: Save, Cancel

Geocortex Widget

This widget does not display

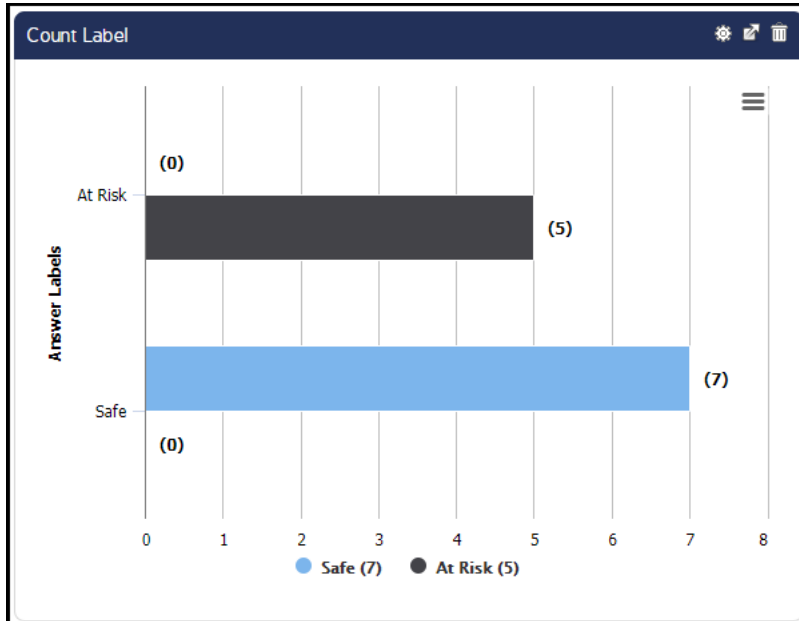


Filters/Configuration



LL. Count Label Widget

This widget displays #s of things. You do not need to have categories configured within the form to count things here. It will count any field that you attach a Count Label to. You must first go to Admin > Forms > Answer Labels and create labels of things you want to count.



Then you must assign these labels to responses in the form config in the Question > **Labels** field.

View Answer

Response Type: Checkbox

* Response Text:

Close Event

Default value source:

* Score:

Alias:

Labels:

Count Label Widget (cont.)

Then you must configure this widget.

The screenshot shows the configuration interface for the 'Count Label' widget. The title bar at the top is dark blue with the text 'Count Label' and three icons: a gear, a share icon, and a trash can. Below the title bar, the configuration is organized into several sections:










- Display Widget As:** A dropdown menu set to 'Bar Chart'.
- Org Units:** A dropdown menu set to 'Select options'.
- Entities:** A dropdown menu set to 'Select options'.
- Entity Types:** A dropdown menu set to 'Select options'.
- Forms:** A dropdown menu set to '1 selected'.
- Event Status:** A dropdown menu set to 'Select options'.
- Sections:** A dropdown menu set to 'All Sections'.
- Categories:** A dropdown menu set to 'Select options'.
- Types:** A dropdown menu set to 'Select options'.
- Classification:** A dropdown menu set to 'Select options'.
- Severity:** A dropdown menu set to 'Select options'.
- Answer Labels:** A dropdown menu set to '2 selected'.
- Custom Color Enabled:** A checkbox that is currently unchecked.
- Period Type:** A dropdown menu set to 'Last 365 Days'.
- Date Type:** A dropdown menu set to 'Event Date'.
- Display Label:** A checkbox that is checked.
- Show Legend:** A checkbox that is checked.
- Display By:** A dropdown menu set to 'Answer Label'.
- Show:** A dropdown menu set to 'All'.


At the bottom left, there are two icons: a left-pointing arrow and a document icon. At the bottom right, the text 'Count Label' is displayed.

Select your hierarchy filters and Date filters as usual. You don't need Categories here. Count Labels take the place of Categories. You will need to select the Answer Labels in the filter and check the checkbox for **Display Label** and set the field **Display By** to Answer Label.

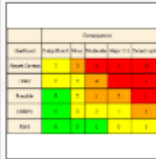
III. Finding Widgets

Select Widget

-  **Workflow (13)**
-  **Event (39)**
-  **Finding (18)**
-  **Training (4)**
-  **Entity (1)**
-  **Action (17)**
-  **Obligation (9)**
-  **Document (3)**
-  **Additional Info Field (2)**

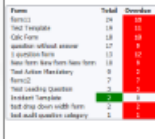


Finding Widget
Finding Widget to display Risks by defined criteria




Risk Matrix
Risk Matrix

	Questions				
Question	Q1	Q2	Q3	Q4	Q5
Question 1	Green	Yellow	Red	Green	Yellow
Question 2	Green	Yellow	Red	Green	Yellow
Question 3	Green	Yellow	Red	Green	Yellow
Question 4	Green	Yellow	Red	Green	Yellow
Question 5	Green	Yellow	Red	Green	Yellow



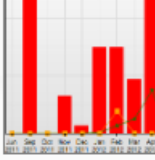
Risks by Category
Risks by Category

Form	Total	Overdue
Form 1	20	10
Form 2	15	5
Form 3	10	5
Form 4	5	2
Form 5	3	1
Form 6	2	1
Form 7	1	0
Form 8	1	0
Form 9	1	0
Form 10	1	0




Potential Loss by Risk Category
Potential Loss by Risk Category

Category	Total
Category 1	100
Category 2	50
Category 3	25
Category 4	12
Category 5	6




Risk Analysis
Risk Analysis

Bar chart showing risk levels across months: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec.




Top 5 Findings By Amount
Top 5 Findings By Amount

Form	Amount
Form 1	1000
Form 2	500
Form 3	250
Form 4	125
Form 5	62



Finding By Process

Process	Total	Overdue
Process 1	20	10
Process 2	15	5
Process 3	10	5
Process 4	5	2
Process 5	3	1
Process 6	2	1
Process 7	1	0
Process 8	1	0
Process 9	1	0
Process 10	1	0



Risk Mitigation Odometer

Bar chart showing risk mitigation progress across categories.

OK | Cancel

A. Finding Widget

This widget displays a list of Findings. The findings in the list depends on the filters you select. You may also determine which columns you want to display.

Description ↑	Entity	Recorded	Actions
Yes welding involved	Vessel	CMO Admin 22 Feb 2015	
Yes third parties are involved	Improvement Project	CMO Admin 22 Feb 2015	
Working with Dangerous Equipment	Head Office	Gary2 Moelk 19 Dec 2018	
Working on dangerous equipment	Head Office	Gary2 Moelk 27 Nov 2018	2 (Overdue) 2 (Request Extension)
Working on dangerous equipment	ATL	Gary2 Moelk 27 Nov 2018	53 (Request Extension) 34 (Overdue) 19 (Pending)
Working on dangerous equipment	Improvement Project	Gary2 Moelk 19 Dec 2018	1 (Overdue) 1 (Request Extension)
Working on dangerous equipment	Gary 5148	Gary2 Moelk 27 Nov 2018	

Page: 1 of 150

1 2 3 4 5 6 7 Next

Filters/Configuration

Finding Widget

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Category: All Finding Categories

Findings count: 7

Status: All Status

Finding Additional Info:

Order By: Description Descending

Finding Widget

Hierarchy filters along with Finding Category and Status. You may also limit the # of Findings to display per page and can Order By different columns. **No Date filter on this widget.**

Column Configuration

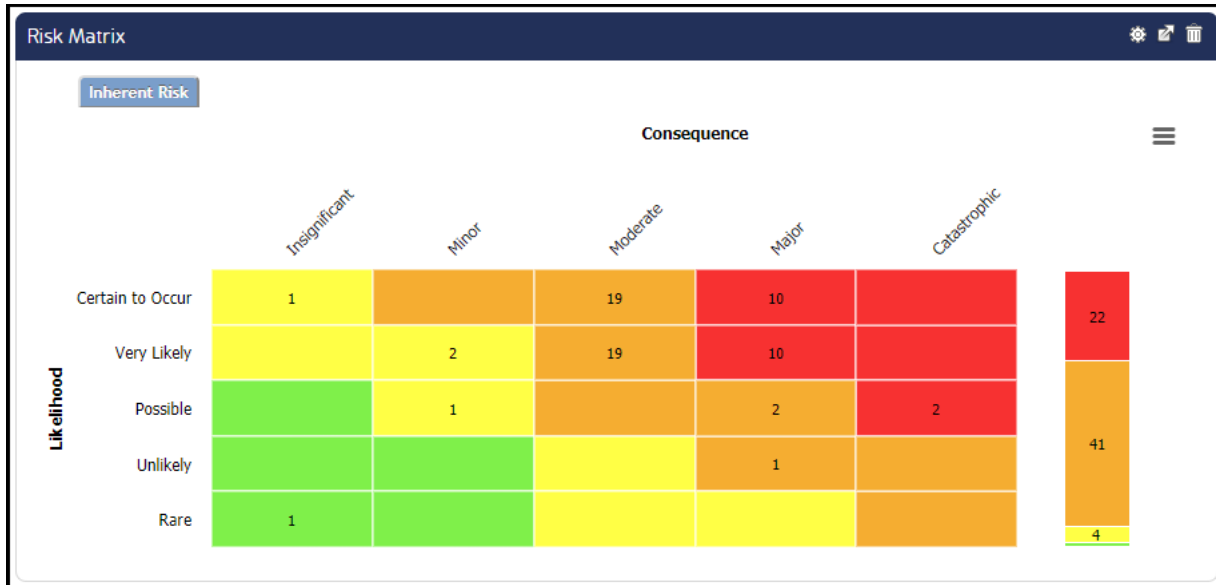
Column Configuration

- Icons
- ID
- Process
- Finding Category
- Parent Finding Category
- Description
- Entity
- Recorded
- Residual Risk
- Ref
- Last Event
- Next Event
- Objective
- Inherent Risk Trend
- Target Risk Trend
- Controls
- Actions
- Target Risk
- Status
- Residual Risk Trend
- Org Unit
- Event ID
- Form

OK Cancel Save for all users

B. Risk Matrix

This widget displays your organization's risk matrix as a "heat map", showing #s of Findings classified at each risk level. You may designate to show any or all of Inherent Risk, Target Risk, and Residual Risk.



Filters/Configuration

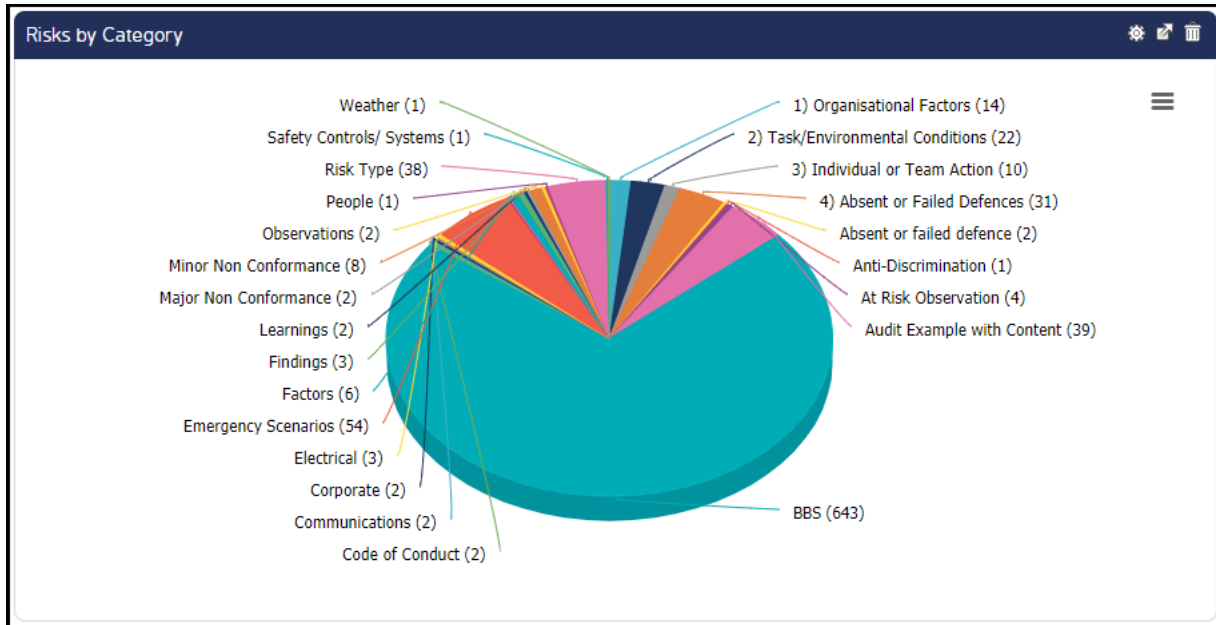
The Filters/Configuration panel for the Risk Matrix widget includes the following settings:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Form: All Forms
- Category: All Finding Categories
- Risk Type: 1 selected
 - Inherent Risk
 - Target Risk
 - Residual Risk
 - Potential Severity

Hierarchical filters available. You may also filter by Form (to which Findings are attached), by Finding Category, and by Risk Type. **No Date filters are available.**

C. Risks by Category

This widget displays #s of risks, breaking them down by Finding Category. The display may be either List, Pie, or Bar chart.



Filters/Configuration

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Finding Categories: [Dropdown]

Include Sub Categories:

Event Category: All Event Categories

Date: Specify period

From Date: 01 Jan 2014

To Date: 20 Aug 2019

Date Type: Event Date

Risk Type: Inherent Risk

Restrict by Event Status: Select options

Breakdown by Risk Level:

Chart Type: List Pie Bar

Hierarchy filters and Date filters available. You may also filter by Finding AND Event Categories. Risk Type is filterable, although you can only filter on 1 risk type at a time. You can choose your view as List, Pie, or Bar chart. If you check "Breakdown by Risk Level" you will only have the List option.

D. Potential Loss by Risk Category

This widget displays potential \$ loss by Risk Category. The \$ amounts are being pulled from the Potential Loss field in the Finding. **NOTE:** You must first activate the Potential Loss field in Business Rules (Capture Potential Loss).

Categories	Total
Operational	\$25,500
Workplace Health and Safety	\$12
MSHA 30 CFR Part 56/57/58	\$1,112
Subpart A - General	\$1,000
Subpart E - Explosives	\$112
Air Quality	\$0
Aquifer Protection	\$0
Business Improvement	\$0
Cost Control	\$0
Culture	\$0

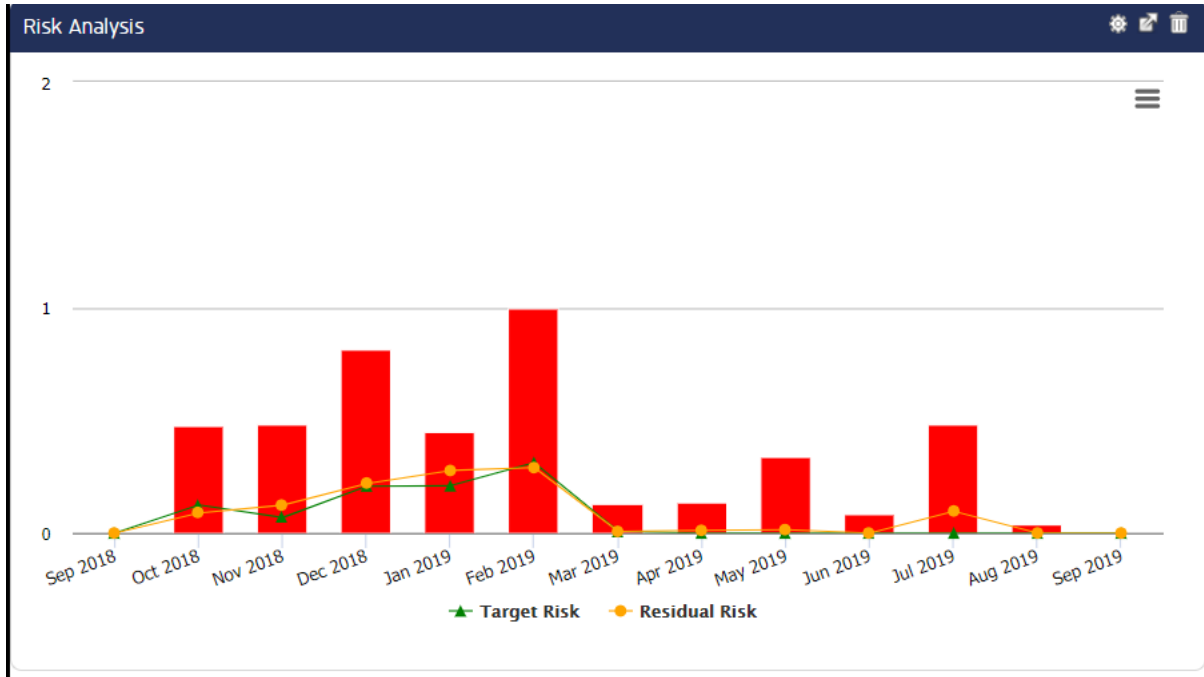
Filters/Configuration

Potential Loss by Risk Category	
Department:	All Departments
Location:	Select options
Event:	All Events
Status:	All Status
Finding Categories:	
Include Sub Categories:	<input checked="" type="checkbox"/>
Event Category:	All Event Categories
Categories to show:	10
Potential Loss by Risk Category	

Hierarchy filters. Event and status filters. Finding and Event Category filters. You have the ability to limit the # of rows to display.

E. Risk Analysis

This widget displays the # of risks recorded within findings and displays them by month over the past 12 months. It also shows the average Target and Residual risk in a line graph imposed on top of the screen.



Filters/Configuration

The filters configuration panel includes the following options:

- Department: All Departments
- Location: Select options
- Area Type: All Area Types
- Event: All Events

Navigation icons (back, home) and the text "Risk Analysis" are visible at the bottom of the panel.

Hierarchy filters and Event filter where you can choose 1 or all events. No Date filter because the date display of monthly over the past 12 months is invariable.

F. Top 5 Findings by Amount

This widget displays the top 5 findings by \$ amount. The \$ amounts are being pulled from the Potential Loss field in the Finding. **NOTE:** You must first activate the Potential Loss field in Business Rules (Capture Potential Loss).

Finding	Score	Amount
House built on top of pipeline	Not Applicable	\$321,000
Electrical system outdated	Extreme: Certain to Occur, Major (23)	\$50,000
Water may fail in times of drought	High: Certain to Occur, Moderate (20)	\$22,000
Dfgfdgh	High: Rare, Catastrophic (15)	\$222
testing Potential Loss field	Extreme: Certain to Occur, Major (23)	\$123

Filters/Configuration

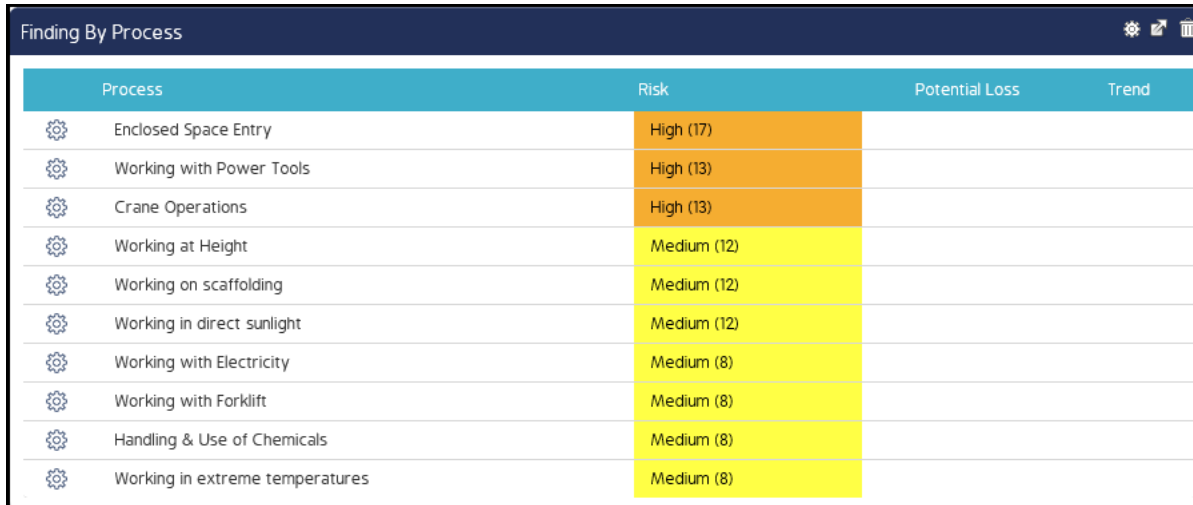
Top 5 Findings By Amount	
Org Unit:	All Org Units
Entity:	Select options
Form:	IM - Incident Report

Top 5 Findings By Amount

Just hierarchy filters and a form filter. **No Date filters.**

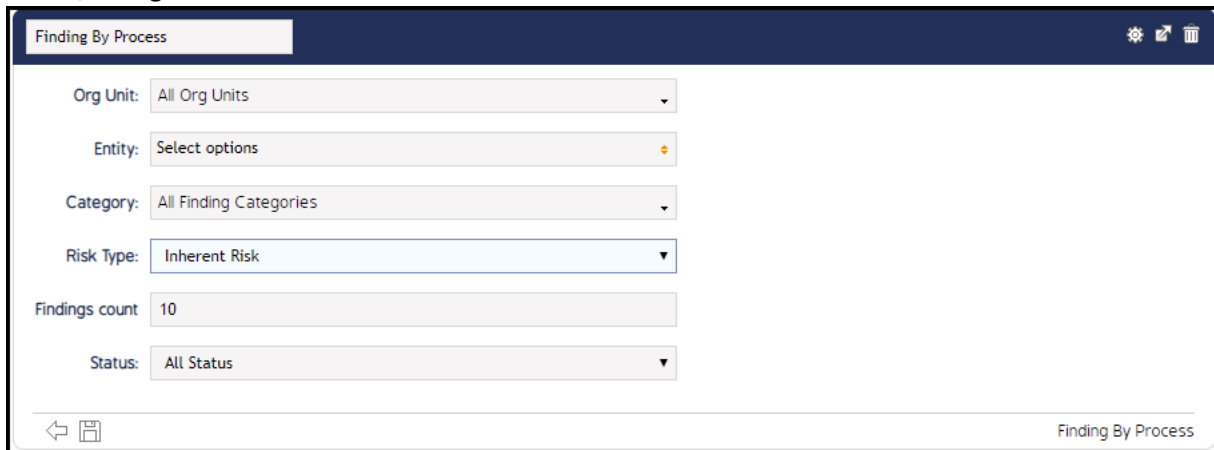
G. Finding by Process

This widget displays the highest Risk value for the listed Processes. NOTE: You need to select Entities for this widget to display values.



Process	Risk	Potential Loss	Trend
Enclosed Space Entry	High (17)		
Working with Power Tools	High (13)		
Crane Operations	High (13)		
Working at Height	Medium (12)		
Working on scaffolding	Medium (12)		
Working in direct sunlight	Medium (12)		
Working with Electricity	Medium (8)		
Working with Forklift	Medium (8)		
Handling & Use of Chemicals	Medium (8)		
Working in extreme temperatures	Medium (8)		

Filters/Configuration



Finding By Process

Org Unit: All Org Units

Entity: Select options

Category: All Finding Categories

Risk Type: Inherent Risk

Findings count: 10

Status: All Status

← [Save icon] Finding By Process

Hierarchy filters, Finding Category filter, Risk Type and Status. You can also limit the # of rows to display. **No date filter.**

H. Risk Mitigation Odometer

This widget displays ... ? Not sure what this is showing but when you drill down into the data, there doesn't seem to be correspondence of # of records between this widget and what you see in the drill down. For instance if I click the 2 Target Risk bar I come to the Finding Register where I see displayed a listing of 68 findings...



Filters/Configuration

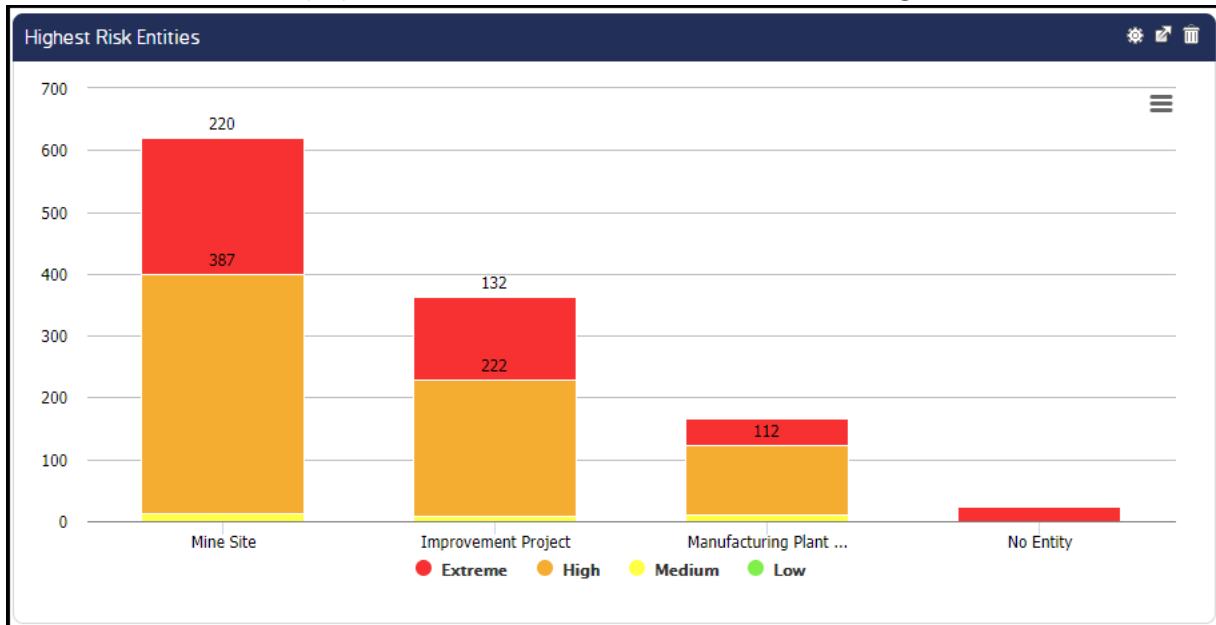
The Risk Mitigation Odometer configuration panel includes the following settings:

- Org Unit: All Org Units
- Entity: Select options
- Risk Levels to Display: Inherent Risk, Residual Risk, Target Risk

Hierarchy filters available as well as Risk Levels. No Date filters.

I. Highest Risk Entities

This widget displays the entities with the highest risk findings. It puts the risks in stacked bars, color coded by Risk level. For each level it adds together the risks: For example, if there were 3 findings with Medium risk, each rated (12), the bar would show 36 for the Medium rating.



Filters/Configuration

Configuration options for the Highest Risk Entities widget:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Risk Type: Inherent Risk
- Date: All

Have all hierarchy filters and Date filter. You can also select 1 Risk Type.

J. Risk Mitigation Analysis

This widget displays the # and avg. score of risk by Process and can be displayed by Risk Type.

Risk Mitigation Analysis						
Process	Number of Risks	Average Score	Target Risk			
			Low	Medium	High	Extreme
All Processes	66	8.5	10	50	5	0
Working with Power Tools	0	0	0	0	0	0
Working with Power Tools	0	0	0	0	0	0
Working at Height	20	8.8	0	20	0	0
Working with Power Tools	0	0	0	0	0	0
Working with Power Tools	5	6.6	3	1	1	0
Working with Electricity	3	5.3	0	2	0	0
Working with Forklift	8	5	4	4	0	0
Working at Height	0	0	0	0	0	0
Working on scaffolding	6	9.7	2	4	0	0

Filters/Configuration

Risk Mitigation Analysis
⚙️ ↗️ 🗑️

Org Unit:

Entity:

Process:

Risk Type:

↩️ 📄
Risk Mitigation Analysis

Hierarchy, Process, and Risk Type filters. **No Date filter.** **NOTE:** Entities MUST be selected for data to display.

K. Risk Mitigation

This widget displays the Status of Controls by Process. This will show the least advanced status if there are multiple Controls in place for the Process.

Process	Status
Working with Power Tools	
Working with Power Tools	
Working at Height	In Progress
Working with Power Tools	
Working with Power Tools	In Progress
Working with Electricity	In Progress
Working with Forklift	In Progress
Working at Height	
Working on scaffolding	In Progress
Example Process	
Working on scaffolding	
Handling & Use of Chemicals	Ineffective /Not Tested
Working in direct sunlight	In Progress

Filters/Configuration

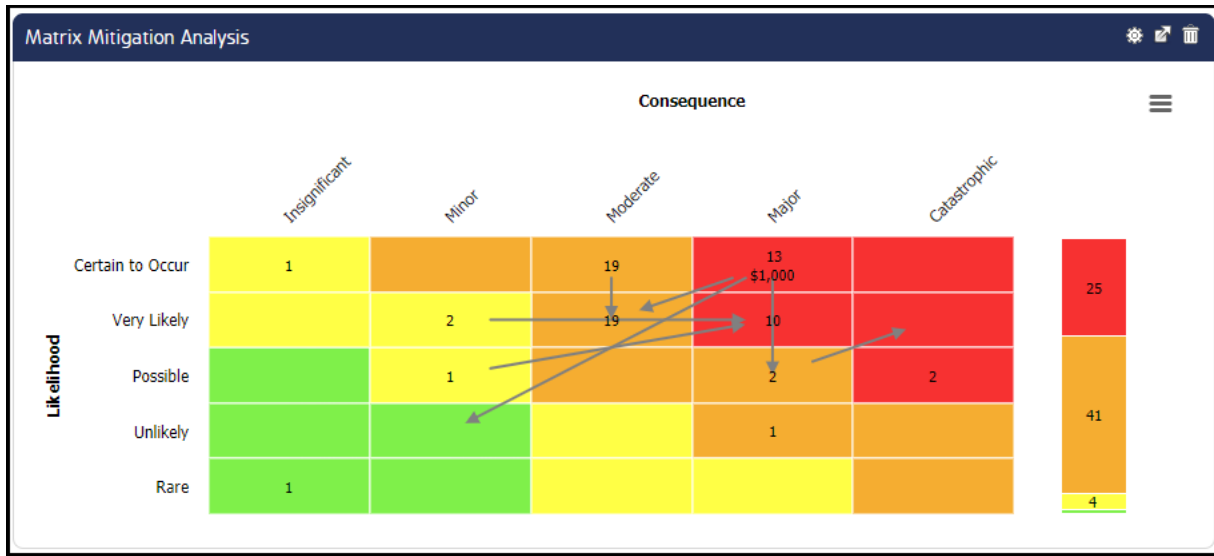
Risk Mitigation	
Org Unit:	All Org Units
Entity:	26 selected
Process:	All Processes
	<input type="checkbox"/> Include Sub Process

← 📄 Risk Mitigation

Hierarchy and Process filters. **No Date filter.** **NOTE:** Entities MUST be selected for data to display.

L. Matrix Mitigation Analysis (repeated from Events widgets)

This widget displays a “heatmap” of actual risk. It is not clear what the arrows are showing. Also when a risk changes in a Finding, this chart does NOT update.



Filters/Configuration

The configuration panel includes the following filters:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Source: Finding Framework
- Process: All Processes

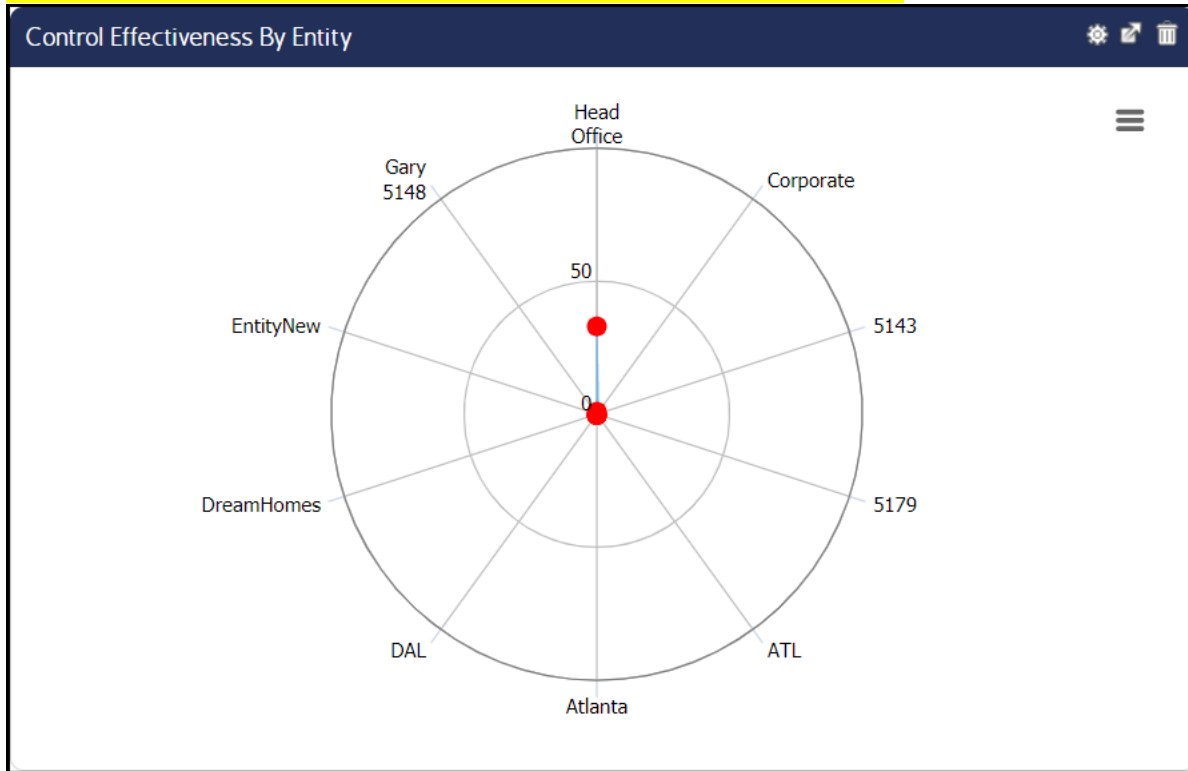
Matrix Mitigation Analysis

The filters are largely hierarchal although this can be run for Findings or Risks.

M. Control Effectiveness by Entity

This widget displays the effectiveness of Controls in reducing risk, in the Findings module.

In truth, I'm not able to get this widget to change. Not sure how it works.??



Filters/Configuration

Control Effectiveness By Entity

Org Unit: All Org Units

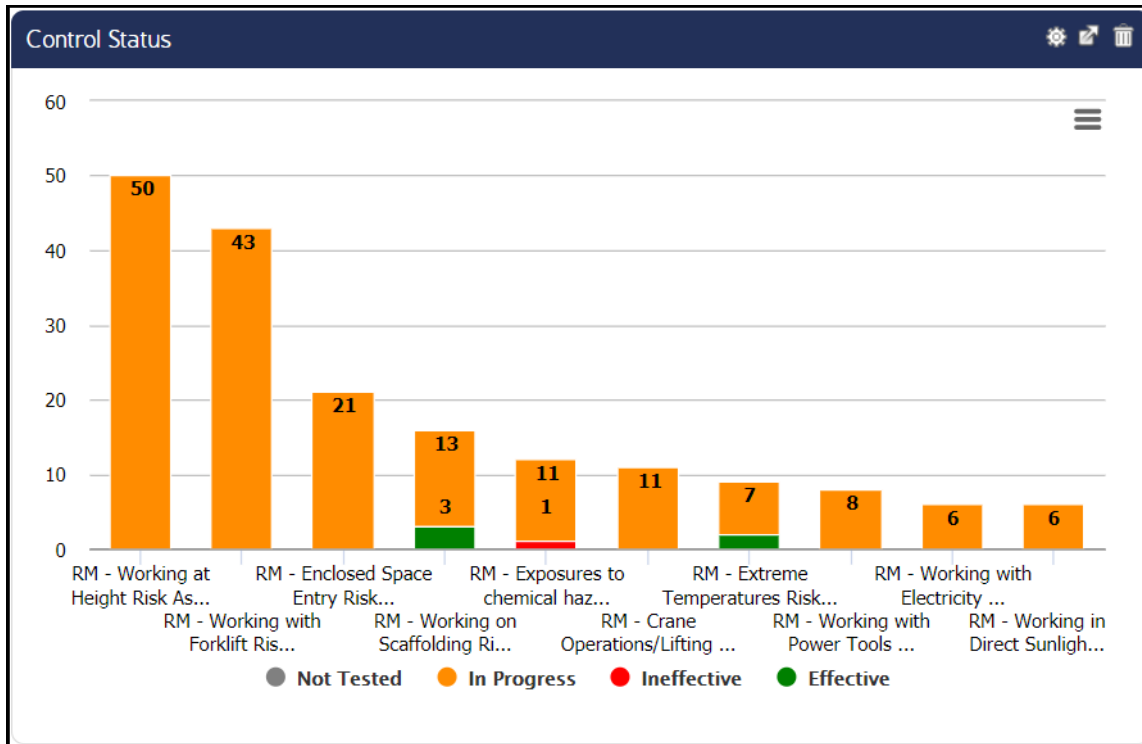
Display By: Most Effective

Control Effectiveness By Entity

Very limited filters. Only for **Org Unit** and **Display By** Most Effective or Least Effective.

N. Control Status

This widget displays #s of Controls attached to Risk Assessment forms (or any forms that use the Response Type Risk Assessment) and add a risk assessment (refer to BP RM forms for more detail in how to configure). The Controls are color coded by Status.



Filters/Configuration

The filter configuration interface for Control Status includes the following options:

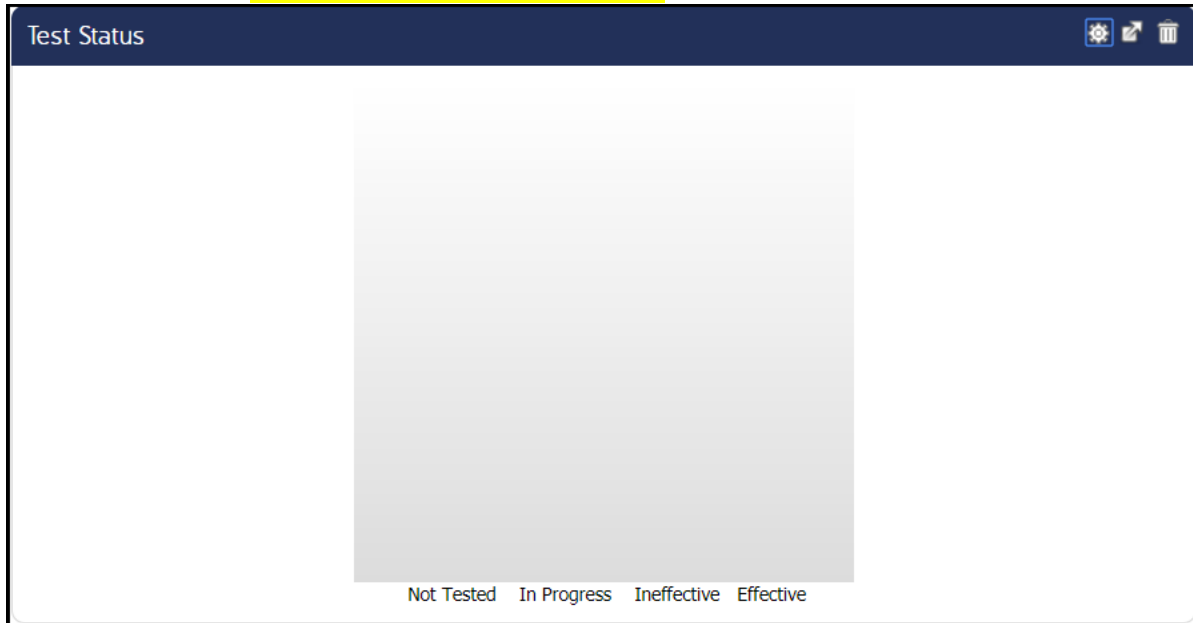
- Control Status (Title)
- By Process (radio button) / By Form (radio button, selected)
- Org Unit: All Org Units (dropdown)
- Entity: Select options (dropdown)
- Finding Category: All Finding Categories (dropdown)
- Current Risk Level: [Grid icon]
- And Above (checkbox, checked)
- Date: Specify period (dropdown)
- From Date: 01 Aug 2019 (calendar icon)
- To Date: 21 Aug 2019 (calendar icon)

Control Status

Hierarchy filters. Finding Category and Current Risk level filters. Date filters exist but don't seem to do anything (Control records have no dates so not sure if a Date filter is even needed here – in any case it doesn't change data display). When you filter By Form you see the Controls from all forms that have the Response Type "Risk Assessment" configured. Refer to BP RM forms to see the configuration.

O. Test Status

This widget displays ... not at all sure what it displays.??



Filters/Configuration



Hierarchy and Date filters along with Process, which contains Risk Assessments.

P. Key Risk Indicators

This widget allows you to count things like # of Events, Actions, Findings, or even Event Categories. You can then compare this period with the previous to see if there is an upward or downward trend.

Key Risk Indicators				
	Prev	Curr	Target	Trend
Injuries	25	37	30	↑
Findings (All Categories)	0	2		↑
Actions (All Action Levels)	16	26		↑
Extreme Findings	0	0		●
Audits Completed	3	7	5	↑

Filters/Configuration

Key Risk Indicators	
KRI Name	Type
Injuries	Events
Findings (All Categories)	Finding Category
Actions (All Action Levels)	Action
Extreme Findings	Current Risk Level
Audits Completed	Events

Filters/Configuration – 2

Key Risk Indicator

Name: Injuries

Target: 30.00

Aim to: Not Reach Target

Type: Events

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Filter By: Event Date

Period: Specify period

From Date: 01 Aug 2015

To Date:

Form: IM - Injury/Illness

Event Category: Medical Treatment Injury (MTI), First Aid Injury (FAI), Lost Time Injury (LTI), Restricted Work Injury (RWI)

Percent Completed on Time

Status: Select options

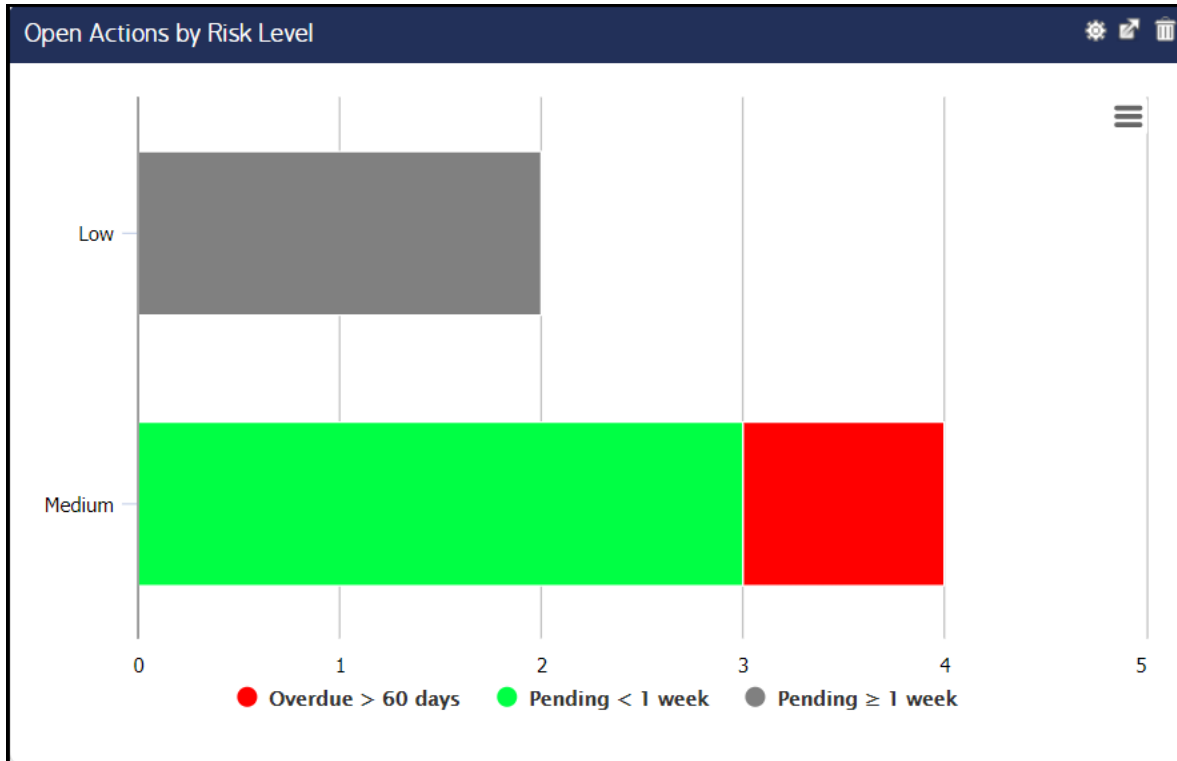
Sub Status:

Save | Cancel

Need a date filter (Year to Date) with the Previous being same period in previous year. Once configured, you may need to refresh the screen to get the results to update.

Q. Open Actions by Risk Level

This widget displays the status of actions that are open and are attached to Findings that have a Risk attached to them. Actions will remain on widget until they are completed.



Filters/Configuration

The configuration panel includes the following filters:

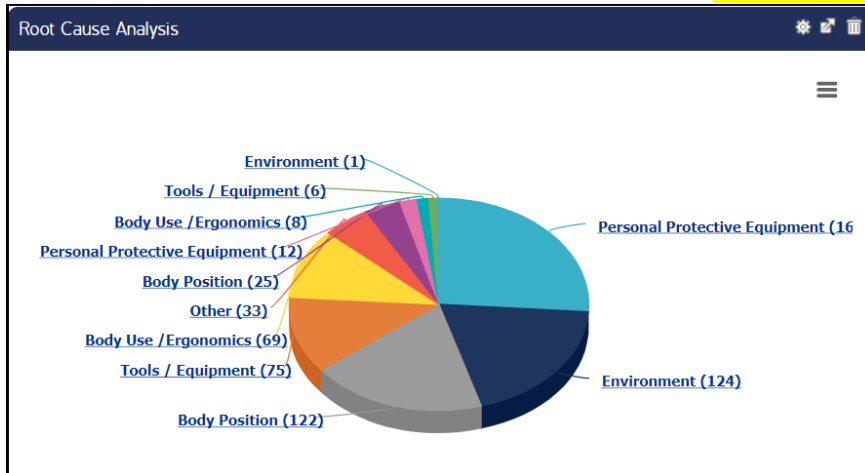
- Org Unit: All Org Units
- Entity: Select options
- Risk Type: Target Risk

Navigation icons (back, save) and the widget title 'Open Actions by Risk Level' are also visible.

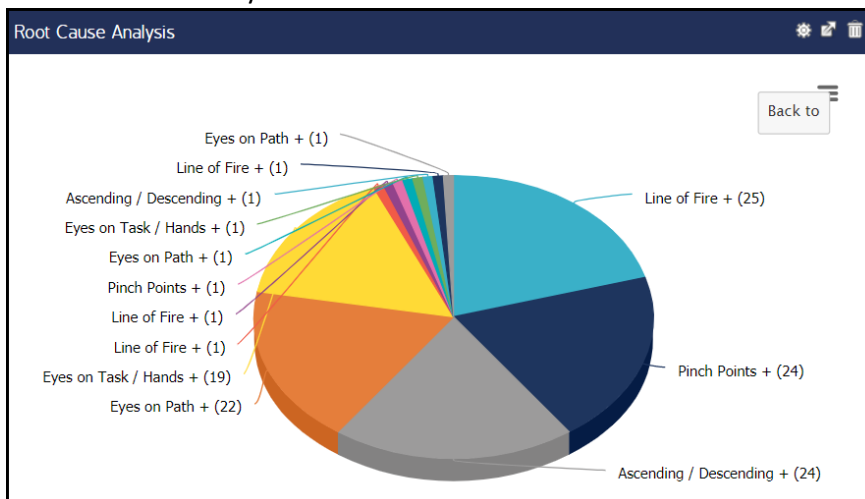
Hierarchy and Risk Type filters. Date filter is not needed because this widget shows all Open Actions.

R. Root Cause Analysis

This widget displays #s of Finding Categories in a Pie Chart (only available display).



You can drill down into any of the pieces of the pie to get Sub-Categories (if there are any). Below is the drill down from Body Position above.



Filters/Configuration

Root Cause Analysis

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Form: H&S - Behaviour Based Safety Observation

Category: *If a form is selected, there are no category options (you get all categories). If no form is selected, you can choose category(ies)*

Severity: All Severities

Date: Last 365 Days










Show Finding Categories: All

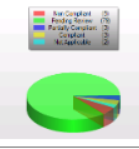
Root Cause Analysis

Hierarchy and Date filters. You also have Form, Category, and Severity filters. You can display all finding categories, or only the top 5, 10, or 15.

IV. Training Widgets

Select Widget

-  Workflow (13)
-  Event (39)
-  Finding (18)
-  Training (4)
-  Entity (1)
-  Action (17)
-  Obligation (9)
-  Document (3)
-  Additional Info Field (2)



Policy Attestation & Compliance Management

My Training Plan

Training Plan	Completed	All Courses
Big Site Evaluation		
Crane - Shwing 201		
Crane - Vertical Hoist		
Hydraulic Management		
Off the Road Lateral Roll Over ROP		
Transportation of Explosives		
Weld Management ROP		

Training & Competence

Training & Competence

Expiring in 30 Days	2
Competent but Expired	4
Not Competent	2
In Training	1

Overdue Training / Competencies

Overdue Training / Competencies

Name	Competence	Due Date	Days Overdue
1. A Shwing	201-01-01	1/1	18
1. S.Maintenance	201-01-01	1/1	18
101-101	1/1		607
John Dwyer	A Shwing Other	201-01-01	18
John Dwyer	A Shwing Other	201-01-01	18
John Dwyer	S. Maintenance	201-01-01	18

OK | Cancel

A. Policy Attestation & Compliance Management

This widget allows you to search items in the Documents module. The same could be done in the Documents register, but this widget can be made available to users who don't have access to the Documents register.

The screenshot shows the 'Policy Attestation & Compliance Management' widget. At the top, there is a search bar labeled 'Policy/Document Search' and a dropdown menu for 'All Document Types'. A 'Search' button is located to the right of the search bar. Below the search bar, there are three sections: 'Rules & Policies to be Attested', 'Attested Rules & Policies', and 'Whistle Blowing'. The 'Attested Rules & Policies' section contains a list of three items, each with a document icon: 'Take 5 Hazards and Controls', 'Health and Safety Policy.doc (1)', and 'SWP - Scissor Lifts.doc (1)'. The 'Whistle Blowing' section has a green plus sign icon.

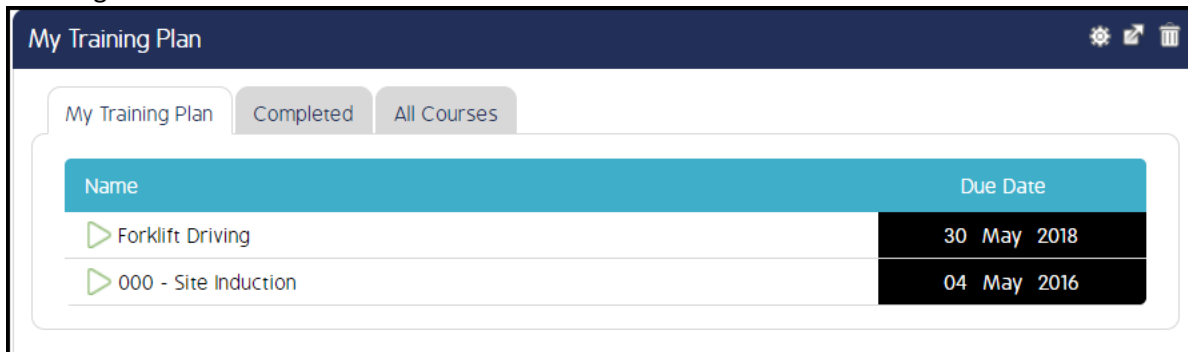
Filters/Configuration

The screenshot shows the 'Filters/Configuration' section of the widget. It features three filter fields: 'Org Unit' with a dropdown menu set to 'All Org Units', 'Entity Type' with a dropdown menu set to 'Select options', and 'Entity' with a dropdown menu set to 'Select options'. Below these fields, there are three checkboxes, all of which are checked: 'Policies to be Attested', 'Attested Rules & Policies', and 'Whistle Blowing'. At the bottom left, there are navigation icons for back and home. At the bottom right, the text 'Policy Attestation & Compliance Management' is displayed.



You can filter by hierarchy as well as 3 flag items.

B. My Training Plan

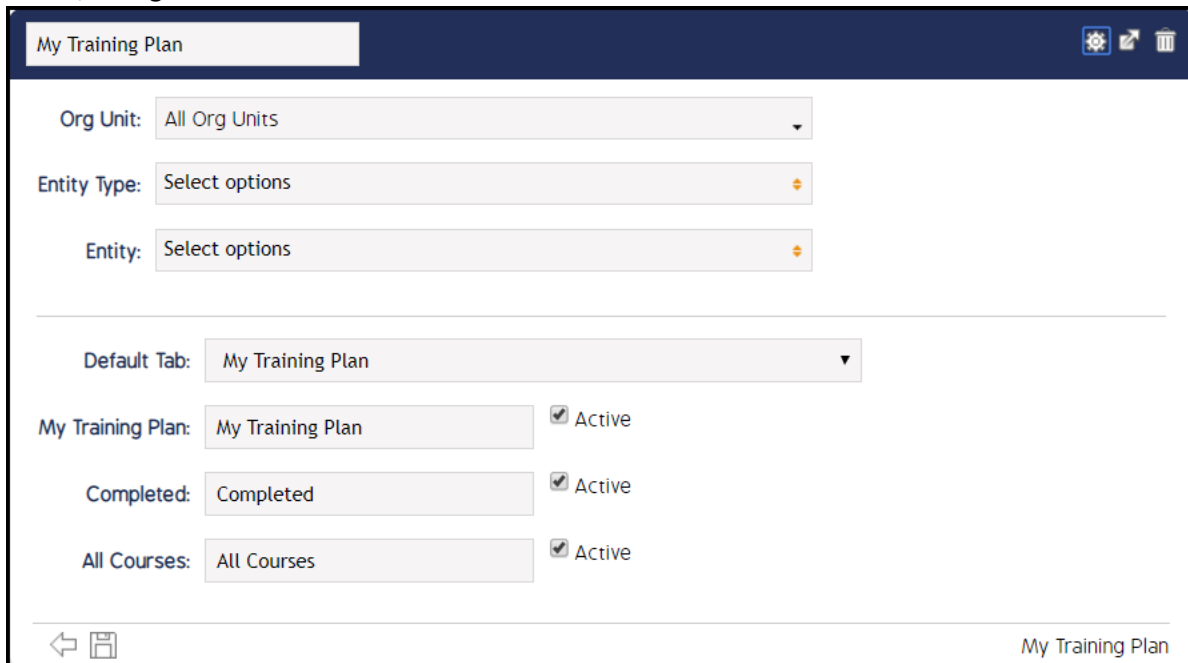
This widget displays your training plan. This is the same information a user would see if they have permissions to go to the Training module and open the My Training Plan tab. In the tab “My Training Plan” you can see listed your pending training. In the “Completed” tab you can see training you have completed, and in the “All Courses” tab you see a search screen where you can search for all courses you are assigned to.



The screenshot shows the 'My Training Plan' widget with three tabs: 'My Training Plan', 'Completed', and 'All Courses'. The 'My Training Plan' tab is active, displaying a table with two columns: 'Name' and 'Due Date'. The table contains two rows of training items.

Name	Due Date
 Forklift Driving	30 May 2018
 000 - Site Induction	04 May 2016

Filters/Configuration



The screenshot shows the configuration screen for the 'My Training Plan' widget. It includes several filter and configuration options:

- Org Unit:** All Org Units (dropdown)
- Entity Type:** Select options (dropdown)
- Entity:** Select options (dropdown)
- Default Tab:** My Training Plan (dropdown)
- My Training Plan:** My Training Plan (input) Active
- Completed:** Completed (input) Active
- All Courses:** All Courses (input) Active

At the bottom, there are navigation icons (back and save) and the text 'My Training Plan'.

Filters available are the Hierarchy filters and then you can choose which tabs you want to display and which one you want to display by default.

C. Training & Competence

This widget displays #s of trainings in various categories. These numbers are derived from the filters that are applied to the Training and Compliance tab in the Training module. The links are live so you can drill down to see a list of specific users and courses.

Training & Competence	
Expiring in 90 Days	0
Expiring in 60 Days	0
Expiring in 30 Days	0
Competent but Expired	0
Not Competent	39
In Training	1
Overdue	39

Filters/Configuration

Training & Competence	
Org Unit:	All Org Units
Entity Type:	Select options
Entity:	Select options
Shift:	All Shifts
Training Category:	All Categories
Name:	000 - Site Induction
Training Type:	All Training

Navigation icons: back, refresh, save. Page title: Training & Competence

Filters available are the hierarchy filters. You can also filter by Shift, Training Category, and Name of training. There is also a filter for Training Type where you can search My Training, or All Training.

D. Overdue Training/Competence

This widget displays trainings that are overdue.

Name	Training	Due Date	Days Overdue
Adam Gregory	12345	30 Sep 2017	703
Adam Gregory	Forklift Driving	27 Oct 2018	310
Asa Turnipseed	Forklift Driving	20 Aug 2019	13
Catherine Compliance	009 - Company Security	16 Jun 2016	1174
Chad Hanks	001 - Emergency Response Training	26 May 2016	1195
Chad Hanks	009 - Company Security	16 Jun 2016	1174
Chad Hanks	028 - Emergency Drills	28 Aug 2017	736
Chris End-User	009 - Company Security	16 Jun 2016	1174
Chris Jones	001 - Emergency Response Training	26 May 2016	1195
Chris Jones	009 - Company Security	16 Jun 2016	1174

Page: 1 of 4 1 2 3 4 Next

Filters/Configuration










Overdue Training/Competencies	
Org Unit:	All Org Units
Entity:	Select options
Job Titles:	All Job Title
Training:	Select options
Classification:	
View by:	Expiring competencies < 30 days
Rows:	10

Overdue Training/Competencies

The filters available are for hierarchy, Training name, Trainin Classification, View by (where you can set the # of days or see < 30 days (Jim this < 30 days filter is not working, as you can see from the screen shot above.)

V. Entity Widget

Select Widget

-  **Workflow (13)**
-  **Event (39)**
-  **Finding (18)**
-  **Training (4)**
-  **Entity (1)**
-  **Action (17)**
-  **Obligation (9)**
-  **Document (3)**
-  **Additional Info Field (2)**

Hours Worked per Site per Month

	Jan-14	Feb-14	Mar-14
Entity 1	2833	2300	2234
Entity 2	1300	1205	1234
Entity 3	895	800	902
Entity 4	402	300	302
Entity 5	2288	3003	2878
Entity 6	250	233	230
Entity 7	927	838	830
Entity 8	367	300	360
Entity 9	1023	1104	1234

Hours Worked per Entity per Month

Hours Worked per Entity per Month

OK | Cancel

A. Hours Worked per Entity per Month

This widget displays the hours worked at entities on a monthly breakdown. The widget will display the entities set in the filter. The same information can be obtained in the Frequency Rate tab, but this can be made available for those without permissions to see the Frequency Rate tab.

	Jan-2019	Feb-2019	Mar-2019	Apr-2019	May-2019	Jun-2019	Jul-2019	Aug-2019
DreamHomes	5000	5000	5000	5000	5450	4440	5000	

Filters/Configuration

Hours Worked per Entity per Month

Org Unit: All Org Units

Entity: 1 selected

Month: 12

Color: Red


Start Date: From the beginning of the Year Custom Date


Hours Worked per Entity per Month


The filters available are the hierarchy filters, the # of months you want to display, the color you want to display IF no hours were entered for that month, and what start date to use.


VI. Action Widgets


Select Widget


 **Workflow (13)**


 **Event (39)**


 **Finding (18)**


 **Training (4)**

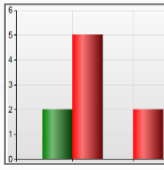
 **Entity (1)**

 **Action (17)**

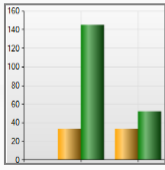
 **Obligation (9)**

 **Document (3)**

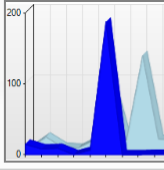
 **Additional Info Field (2)**



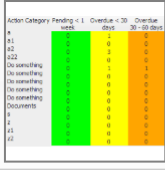
Action summary by Entity
Action summary by Entity chart



Pending vs Completed Actions
Pending vs Completed Actions chart




Recorded vs Completed Actions
Recorded vs Completed Actions chart



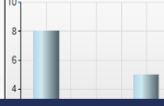
Actions Status by Age
Actions Status by Age

Overdue	3696
Due in 7 days	6
Awaiting Verification	189

Actions by status
Actions by status



Action Summary By Status
Action Summary By Status



Actions By Category
Actions By Category

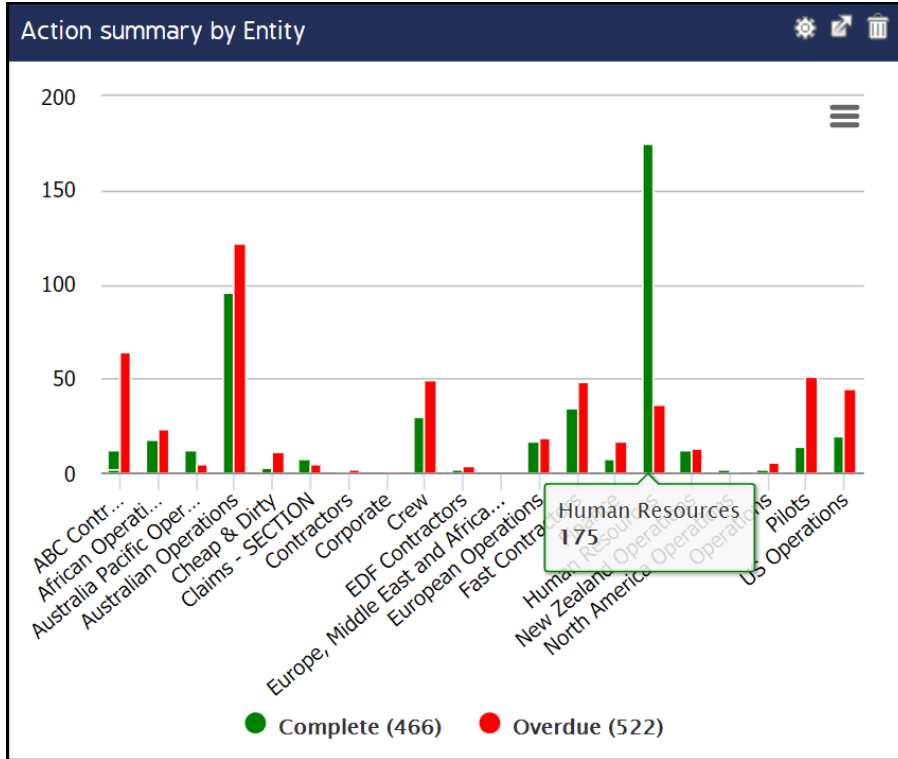
Control	Due Date	Responsible Party
test1	18 Mar 2012	CHQ Test
Test Copy 1	19 Mar 2012	CHQ Test
Action(EA-35126) 1	12 Mar 2012	CHQ Test
test	12 Mar 2012	CHQ Test
new action	15 Dec 2011	CHQ Test

Action Widget
Action Widget

OK | Cancel

A. Action Summary by Entity

This widget displays a column chart of all Completed and Overdue actions by Org Unit / Hierarchy.



Filters/Configuration

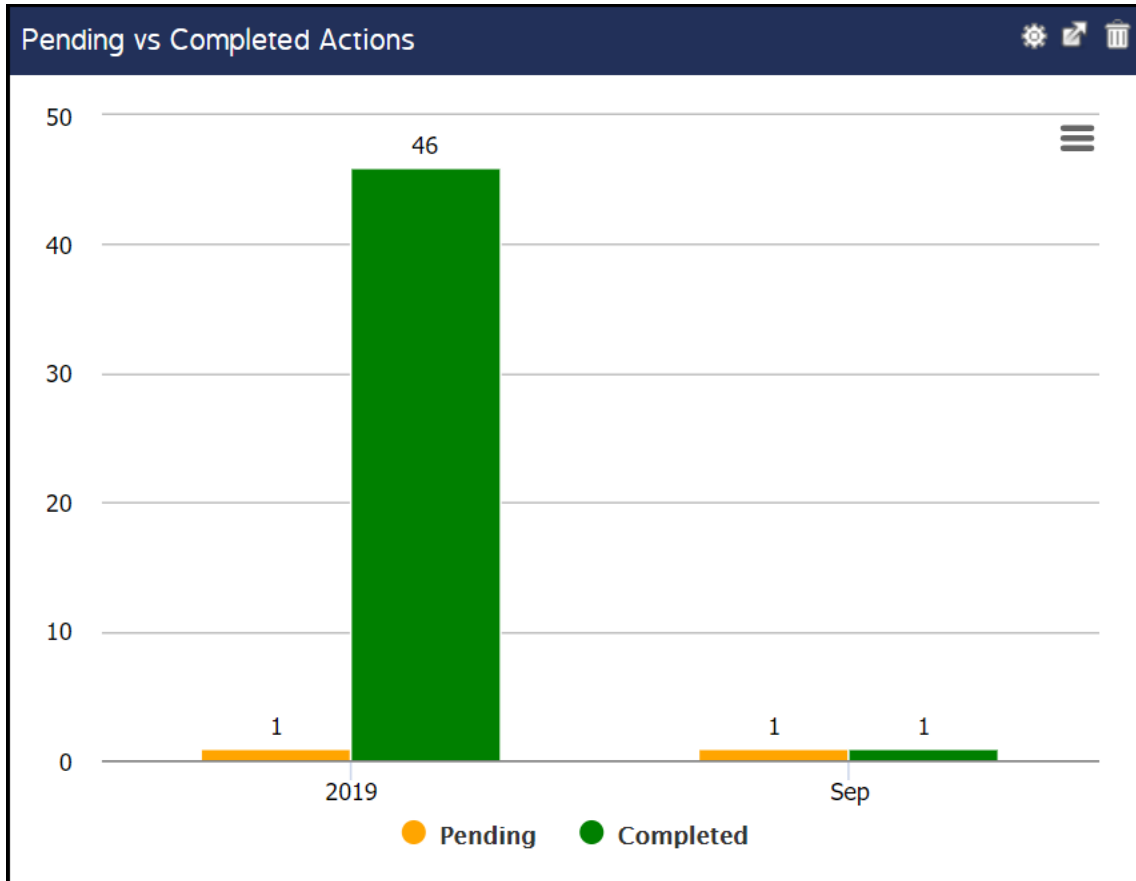
The configuration panel includes the following filters:

- Type: All Actions
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Action Category: All Categories
- Form: Select options
- Question Category: All Categories
- Responsible: All
- Date: Specify period
- From Date: 01 Sep 2015
- To Date: 03 Sep 2019
- Breakdown by Entity:

You can filter by Hierarchy, Action Category, Form, Question Category, Responsible, or Date Range. If you click Breakdown by Entity, the chart will not show the breakdown by Org Unit.

B. Pending vs. Completed Actions

This widget displays #s of Pending and Completed Actions. In the first year columns it displays # of actions in the current year. Then in the right hand column it shows # of actions in the current month.



Filters/Configuration

The configuration panel for the widget includes the following filters:

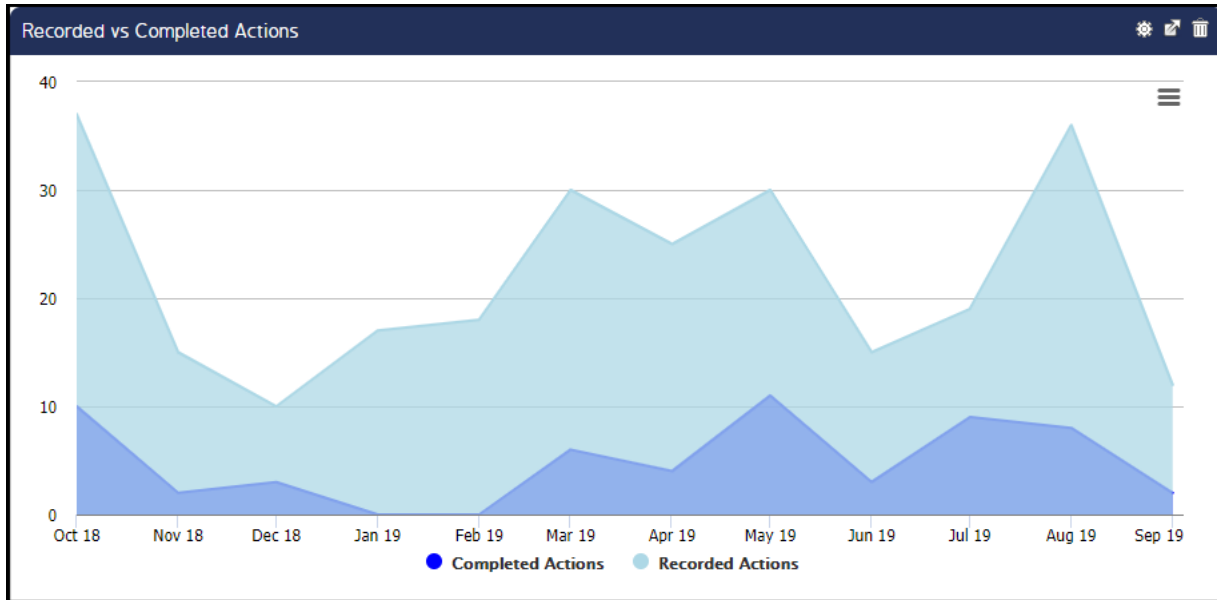
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: 26 selected

Navigation icons (back and save) are located at the bottom left, and the widget title 'Pending vs Completed Actions' is at the bottom right.

Only hierarchy filters are available. The date range is current year and current month by default.

C. Recorded vs. Completed Actions

This widget displays #s of Recorded (any actions in the system whether overdue, complete, or pending) and Completed Actions by month over the past 12 months.



Filters/Configuration

Recorded vs Completed Actions

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Recorded vs Completed Actions

The only filters available are hierarchy filters. (Date filters would be useful here. Also other filters such as those in the "Action Summary by Status" widget would be good here.)

D. Actions Status by Age

This widget displays #s of Open actions by 5 different preset ages in columns with preset colors.

Action Category	Pending ≥ 1 week	Pending < 1 week	Overdue < 30 days	Overdue 30 - 60 days	Overdue > 60 days
Advanced Notification	0	0	0	0	1
Agreement	0	0	0	1	2
Change Request	0	0	0	0	1
Company Rep Action	0	0	0	0	0
Compliance Task	0	0	0	0	9
Quality Related	0	0	0	0	0
Rehab Activity	0	0	0	0	0
Rehab Goals	0	0	0	0	0
RTW Plan Review	0	0	0	0	0
Stakeholder Engagement	0	0	0	0	1
Workflow	0	0	2	0	356

Filters/Configuration

Actions Status by Age	
Org Unit:	All Org Units
Entity Type:	Select options
Entity:	Select options

The only filters available are hierarchy filters. (Date filters would be useful here. Also other filters such as those in the "Action Summary by Status" widget would be good here.)

E. Actions by Status

This widget displays #s of actions that are Overdue, Due in 7 days, and Awaiting Verification (in this Action Workflow, "Awaiting Verification" are those actions that are Complete but have not been Verified).

Actions by status	
Overdue	524
Due in 7 days	4
Awaiting Verification	478

Filters/Configuration

Actions by status

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Action Category: All Categories

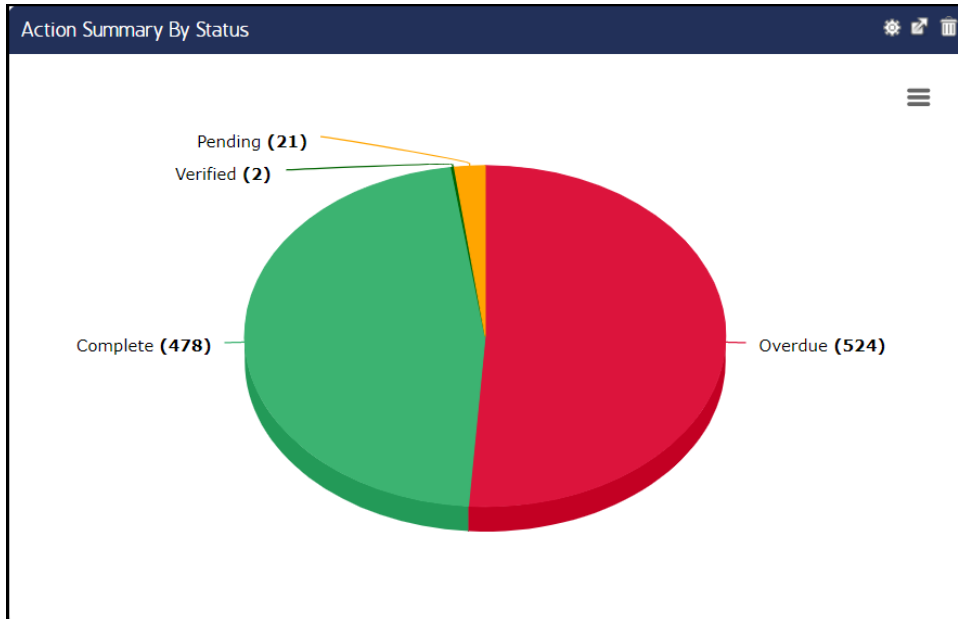
Form: Select options

Actions by status

Filters available are the hierarchy filters, the Action Categories and Forms. . (Date filters would be useful here. Also other filters such as those in the "Action Summary by Status" widget would be good here.)

F. Action Summary By Status

This widget displays #s of actions in the statuses: Pending, Complete, Overdue, and Verified. Display can be in Pie, Bar, Column, or Donut chart.



Filters/Configuration

The configuration panel for the "Action Summary By Status" widget includes the following settings:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Action Category: All Categories
- Responsible: All
- Form: Select options
- Question Category: All Categories
- From Date: [Calendar icon]
- To Date: [Calendar icon]

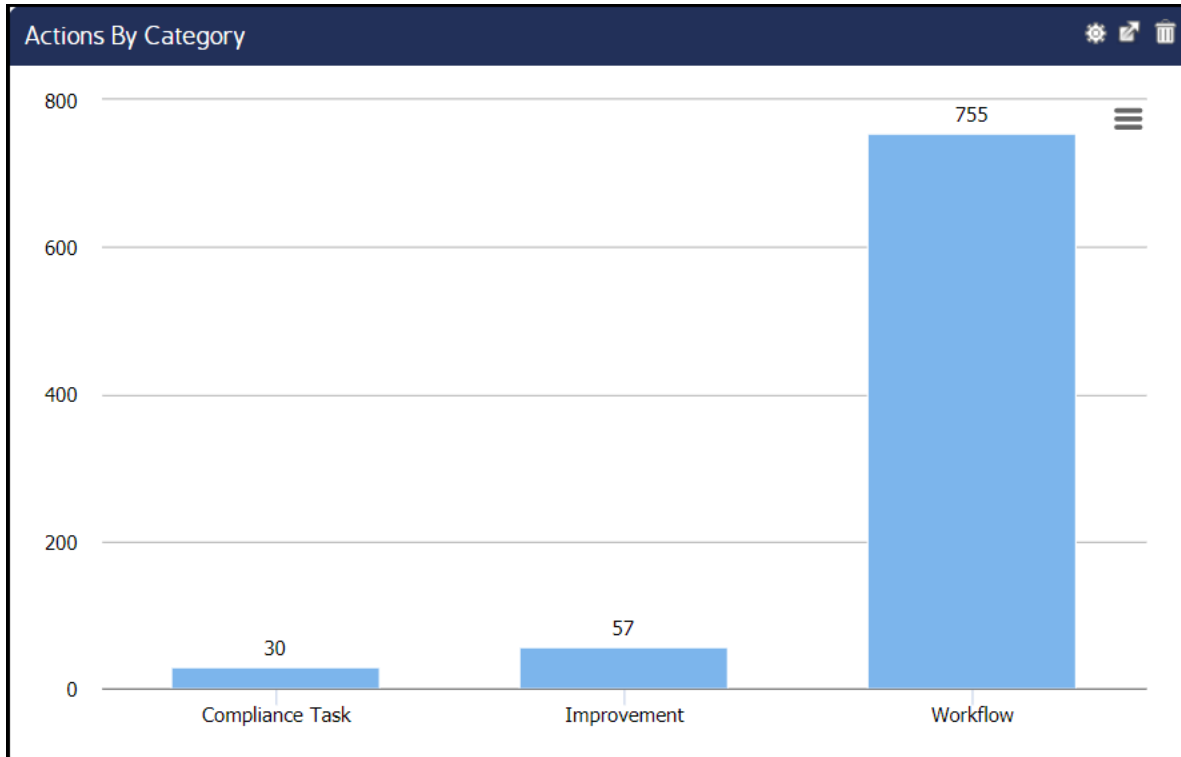
Parameters of Chart

- Display Widget As: Pie Chart
- Target (Bar and Column only): [Add icon]
- Show Legend (Pie and Donut Chart only)
- Show Data Labels
- Length for line breaks: 40

Full set of filters available: Hierarchy, Action Category, Responsible, Form, Question Category, Dates, and Chart Types.

G. Actions by Category

This widget displays #s of Actions by Category in a column chart.



Filters/Configuration

The configuration panel for the "Actions By Category" widget includes the following settings:

- Org Unit: All Org Units
- Action Categories: 3 selected
- Show Parent Category:
- Show Child Category:
- Include Child Category in Parent Category Count:
- Responsible: All
- Status: All
- From Date: [Calendar icon]
- To Date: [Calendar icon]

Navigation icons (back and save) are located at the bottom left, and the widget title "Actions By Category" is at the bottom right.

Full selection of filters: Hierarchy, Action Categories with ability to show Parent and Child Categories, Responsible, Action Status and Date Range. Only Column Chart format is available.

H. Action Widget

This is a very useful widget to show people Actions pending their attention. The below shows all statuses but can be limited to only show Pending and Overdue, or just Overdue. It is a listing format. It defaults to setting the Responsible to the person who is logged in.

Action	Action Category	Responsible	Status	Due Date ↑
Take a reading at input 201		Bubba Ganoush	Complete	11 Sep 2019
Another action		Bubba Ganoush	Pending	11 Sep 2019
Test the action widget		Bubba Ganoush	Overdue	03 Sep 2019
Tell people to be more careful		Bubba Ganoush	Overdue	28 Aug 2019
Tell people to be more careful		Bubba Ganoush	Overdue	28 Aug 2019
Initial Entry	Workflow	Bubba Ganoush	Overdue	01 Jul 2019
Initial Entry	Workflow	Bubba Ganoush	Overdue	22 Jun 2019
More Information Requested	Workflow	Bubba Ganoush	Complete	22 Jun 2019
Initial Entry	Workflow	Bubba Ganoush	Complete	22 Jun 2019
Need to notify Contractor company of incident and ask them to do remedial training with their drivers	Preventative	Bubba Ganoush	Overdue	19 Jun 2019
test dates		Bubba Ganoush	Overdue	02 Jan 2019

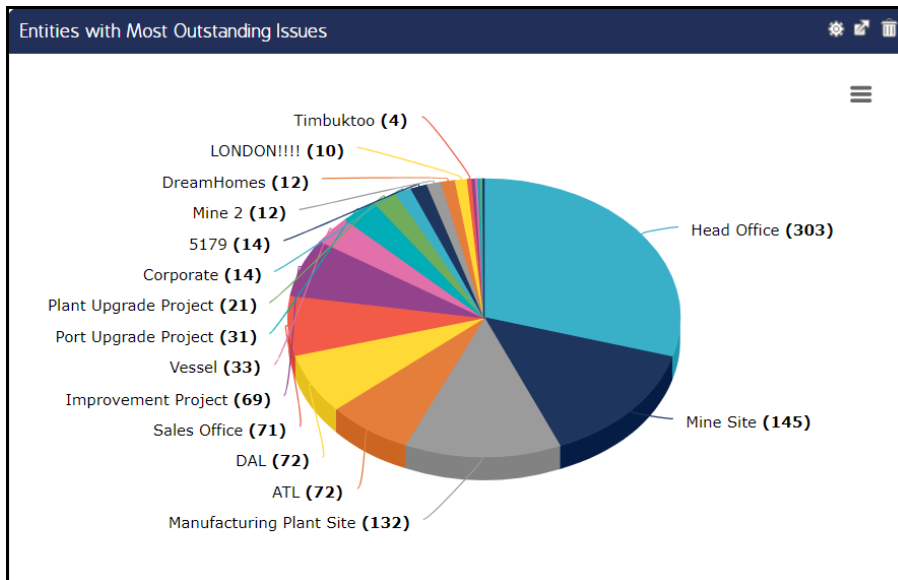
Filters/Configuration

Org Unit:	All Org Units	
Entity Type:	Select options	
Entity:	Select options	
Action Category:	All Categories	
Action Status:	Overdue	
Responsible:	Bubba Ganoush (bubba)	
Due Date (From):		
Due Date (To):		
Order By:	Due Date	Descending

A full set of filters is available: Hierarchy, Action Category, Action Status, Responsible (defaults to person logged in), Dates, and Order By choices.

I. Entities with Most Outstanding Issues

This widget displays #s of actions. Can be used to show those in a certain status, ie. Pending, Overdue, Complete, Verified, or linked to a certain form, or in a date range. Widget title should be changed to correspond with filters selected. Could make this for 1 form and 1 status and rename to reflect these filters.



Filters/Configuration

Org Unit: All Org Units

Entity: Select options

Forms: All Forms

Question Categories: All Categories

From Date: [Calendar Icon]

To Date: [Calendar Icon]

Select top number of Entities to show: All Entities

Action Status: All

Parameters of Chart

Display Widget As: Pie Chart

Target (Bar and Column only): +

Show Legend (Pie and Donut Chart only)

Show Data Labels

Color Scheme: Multicoloured

Length for line breaks: 40

Full set of filters available: Hierarchy, Forms, Question Categories, Dates, Action Status (this is the most important filter for this widget – title of widget should match the status selected, ie. “Entities with most Overdue Actions”). Chart types are available as well.


J. Total No of Actions

This widget displays #s of Completed, Verified, and Overdue actions as well as the Completion Rate. The format is a list which is invariable.

Total No of Actions	
Completed Actions	478
Verified Actions	2
Completion Rate	47%
No of Overdue Actions	524
Total	1026

Filters/Configuration

Total No of Actions	
Org Unit:	All Org Units
Action Category:	All Categories
Responsible:	All
From Date:	<input type="text"/>
To Date:	<input type="text"/>

←  Total No of Actions

Filters available are Hierarchy and Dates as well as the Responsible. (It would be useful to add a filter for the statuses you want to display. This widget has no way of displaying Pending actions. Also, only 1 Responsible can be shown – if a manager wants to see all his reports it wouldn't be possible, so multi-select on Responsible would be useful.)

K. Actions by Form

This widget displays #s of actions by form, Total #s and Overdue #s.

Form	Total	Overdue
AI - Inspection Example with Content	14	10
IM - Incident Report	4	4
zz FAS Investigation	3	3
AA - Agency Visit (US)	2	2
AA - ISO 9001 : 2015 Quality Management Systems Audit	2	1
Environmental Management Audit for Obligations	2	2
zz SRS	2	1
IM - Certificates / Doctor's Notes	1	1
IM - Return to Work (RTW) Plan	1	1
RM - Working with Forklift Risk Assessment	1	0
RM - Working at Height Risk Assessment	1	1
RM - Working on Scaffolding Risk Assessment	1	1
RM - Working with Power Tools Risk Assessment	1	1
RM - Extreme Temperatures Risk Assessment	1	1
AA - Audit Generic Template (Pass / Fail)	1	1
AA - Audit Example with Content	1	1
zz JAMO - TEST	1	1

Filters/Configuration

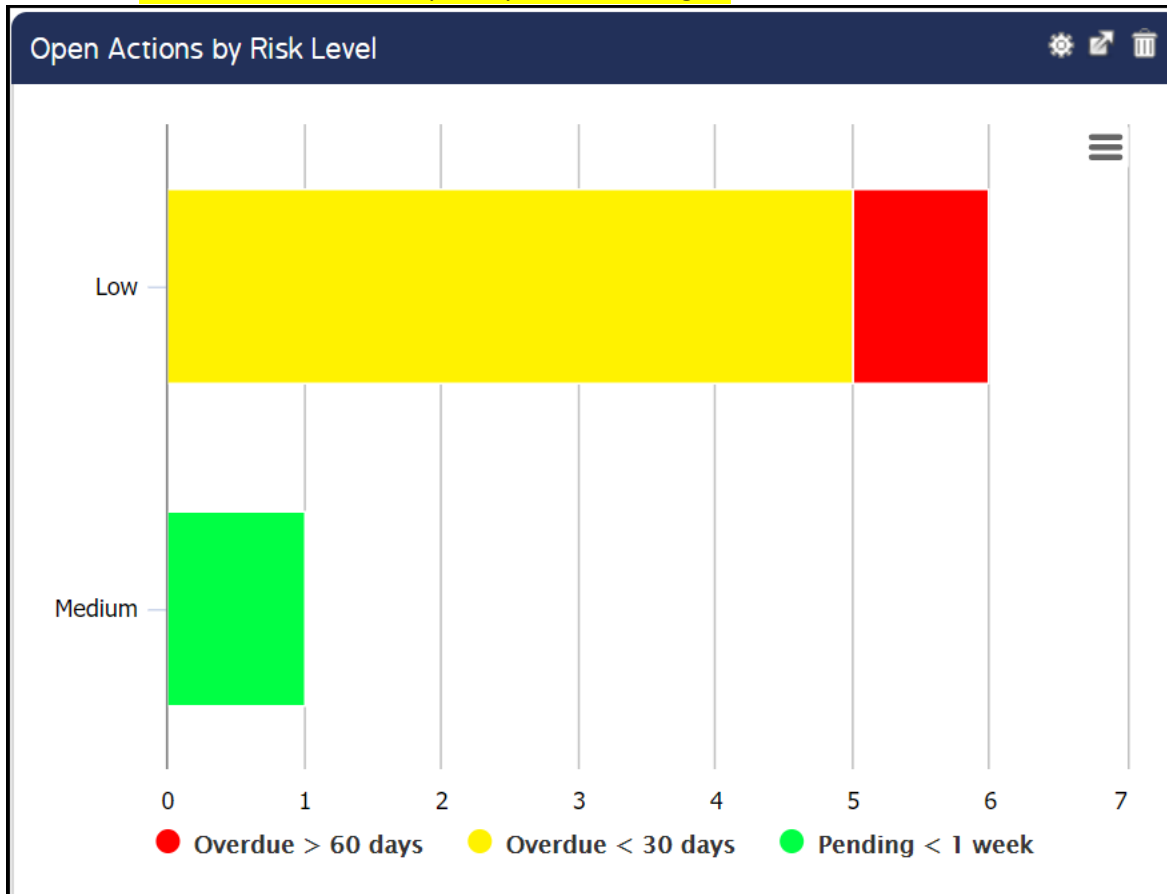
Actions by Form	
Org Unit:	All Org Units
Entity:	Select options
From Date:	<input type="text"/>
To Date:	<input type="text"/>
Rows:	250

← 📁 Actions by Form

Hierarchy and Date filters available as well as # of rows. (It would be really helpful in this widget to have a Form filter with ability to select multiple forms.)

L. Open Actions by Risk Level

This widget displays Actions that are attached to Findings/Risks that have a risk assigned to them. It shows the # of actions in various statuses: Pending & overdue by a certain # of days. This display is invariable. **There is no drill down capability from this widget.**



Filters/Configuration

The configuration panel includes the following settings:

- Org Unit: All Org Units
- Entity: Select options
- Risk Type: Residual Risk

Navigation icons (back, refresh) and the widget title 'Open Actions by Risk Level' are also visible.

You can filter by hierarchy and Risk Type. **(Date filters would be useful here. Also other filters such as those in the "Action Summary by Status" widget would be good here.)**

M. Key Risk Indicators (same widget found under Workflow and Events)

This widget allows you to count things like # of Events, Actions, Findings, or even Event Categories. You can then compare this period with the previous to see if there is an upward or downward trend.

Key Risk Indicators				
	Prev	Curr	Target	Trend
Injuries	25	37	30	↑
Findings (All Categories)	0	2		↑
Actions (All Action Levels)	16	26		↑
Extreme Findings	0	0		●
Audits Completed	3	7	5	↑

Filters/Configuration

Key Risk Indicators	
KRI Name	Type
Injuries	Events
Findings (All Categories)	Finding Category
Actions (All Action Levels)	Action
Extreme Findings	Current Risk Level
Audits Completed	Events

Filters/Configuration – 2

Key Risk Indicator

Name: Injuries

Target: 30.00

Aim to: Not Reach Target

Type: Events

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Filter By: Event Date

Period: Specify period

From Date: 01 Aug 2015

To Date:

Form: IM - Injury/Illness

Event Category: Medical Treatment Injury (MTI), First Aid Injury (FAI), Lost Time Injury (LTI), Restricted Work Injury (RWI)

Percent Completed on Time

Status: Select options

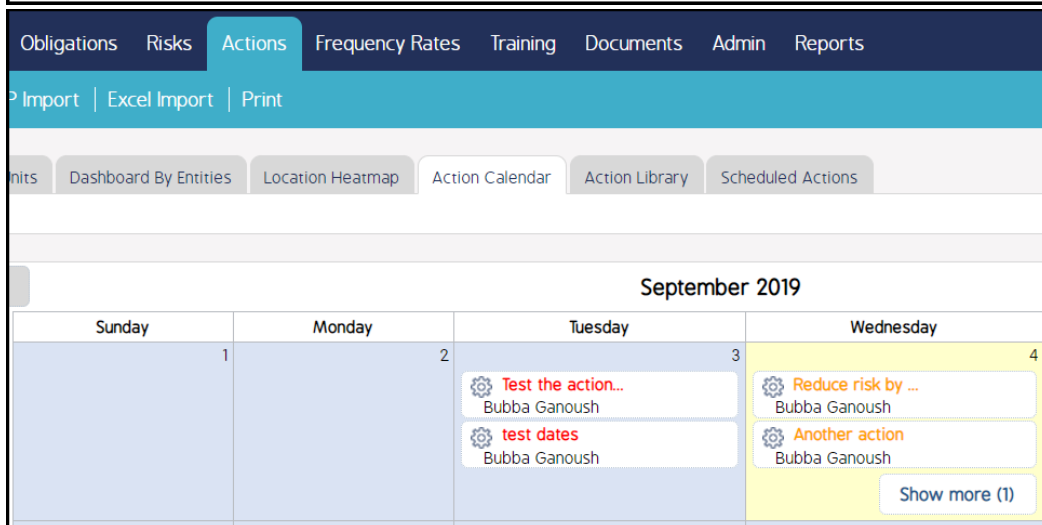
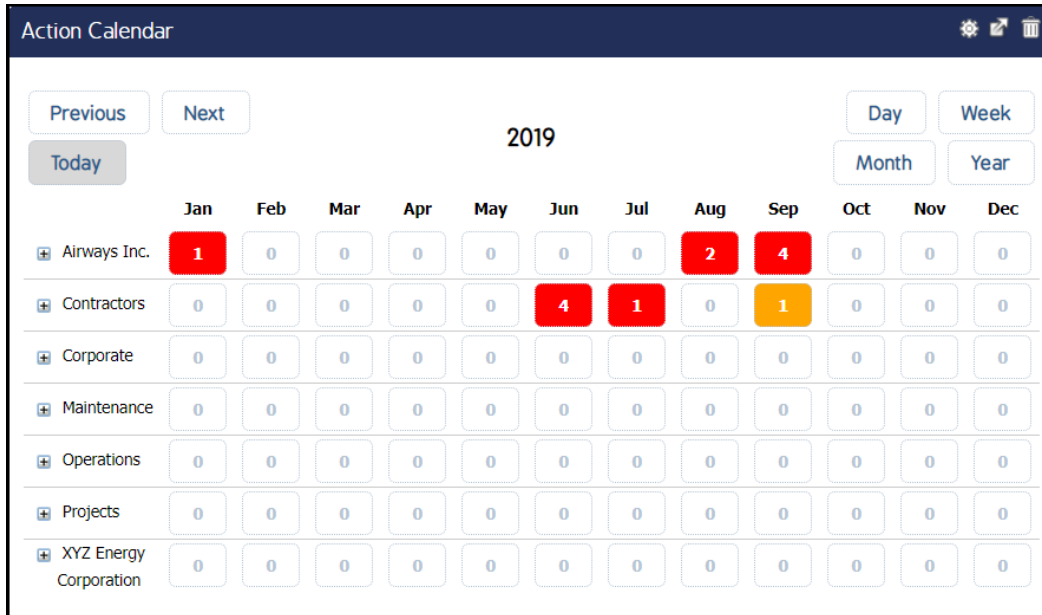
Sub Status:

Save | Cancel

Need a date filter (Year to Date) with the Previous being same period in previous year. Once configured, you may need to refresh the screen to get the results to update.

N. Action Calendar

This widget displays a calendar of all pending actions per Org Unit with drill down option into Entities. Clicking on the actions will open the Action register to the Action Calendar tab. (see below)



Filters/Configuration

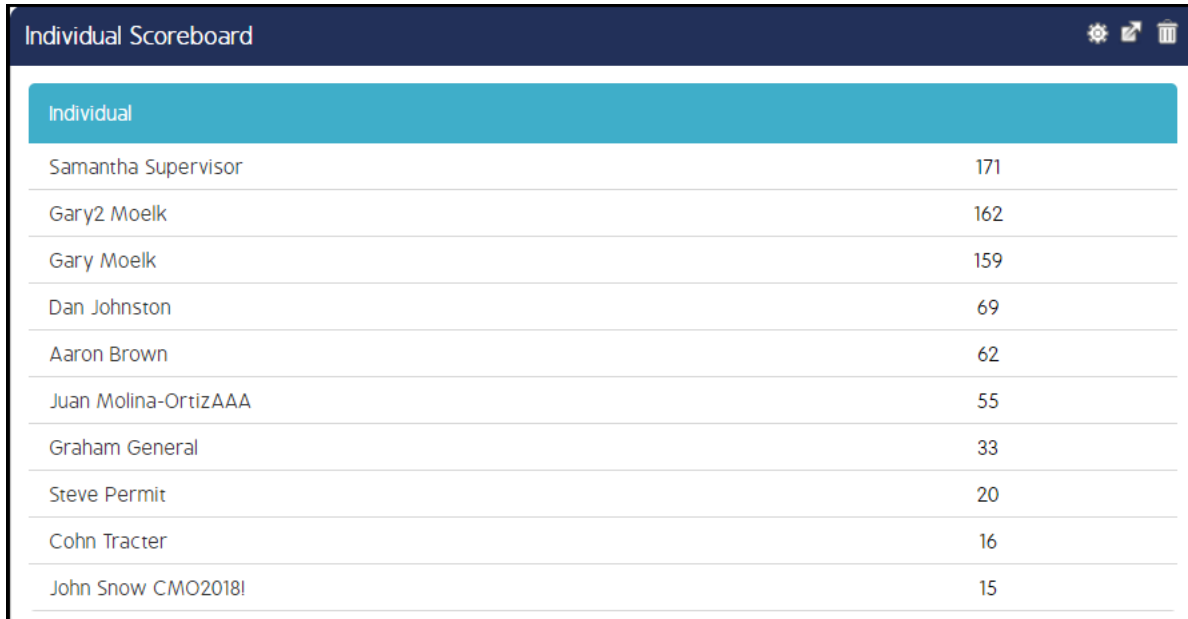
The Filters/Configuration widget for the Action Calendar includes the following settings:

- Org Unit: All Org Units
- Entity: Select options
- Responsible: Current User
- From Date: [Calendar icon]
- To Date: [Calendar icon]

Hierarchy and date filters are available as well as a filter for a Responsible. You can select Current User for this filter.

O. Individual Scoreboard

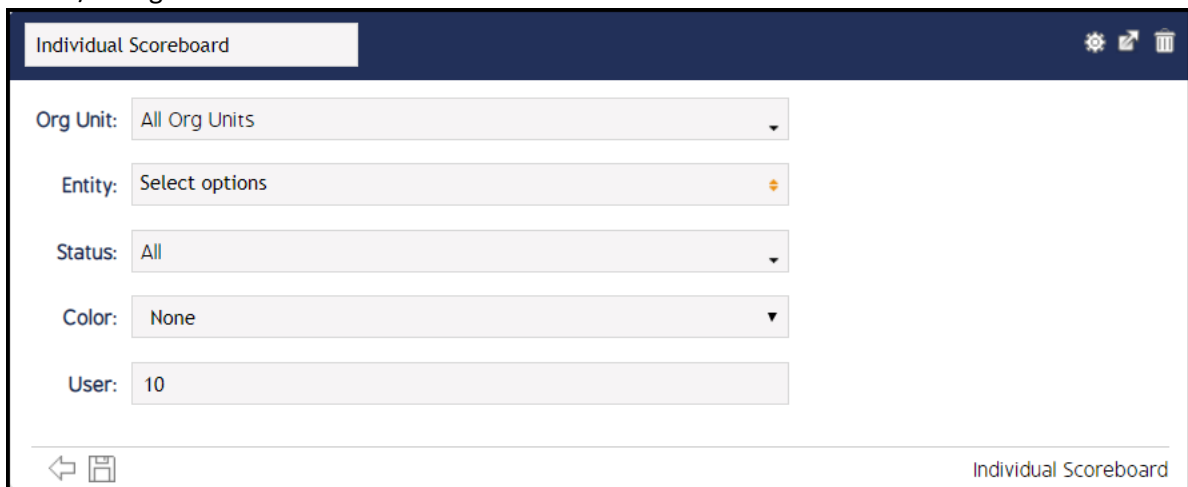
This widget displays #s of actions assigned to Users. The # includes all actions for whatever status(es) are filtered. The number is a live link that can be drilled down into.



The screenshot shows the 'Individual Scoreboard' widget. It has a dark blue header with the title 'Individual Scoreboard' and three icons (gear, share, trash) on the right. Below the header is a teal bar with the word 'Individual'. The main content is a table with two columns: user names and their corresponding action counts.

Individual	
Samantha Supervisor	171
Gary2 Moelk	162
Gary Moelk	159
Dan Johnston	69
Aaron Brown	62
Juan Molina-OrtizAAA	55
Graham General	33
Steve Permit	20
Cohn Tracter	16
John Snow CMO2018!	15

Filters/Configuration

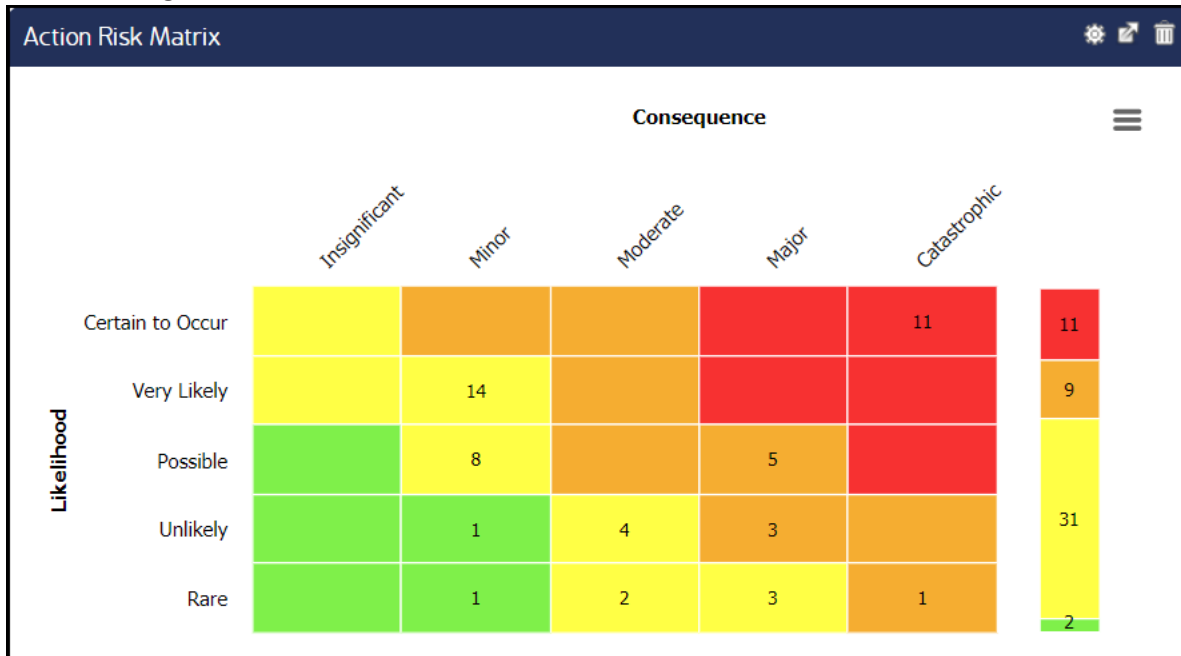


The screenshot shows the configuration panel for the 'Individual Scoreboard' widget. It has a dark blue header with the title 'Individual Scoreboard' and three icons (gear, share, trash) on the right. Below the header are five filter controls: 'Org Unit' (dropdown menu with 'All Org Units'), 'Entity' (dropdown menu with 'Select options'), 'Status' (dropdown menu with 'All'), 'Color' (dropdown menu with 'None'), and 'User' (text input field with '10'). At the bottom left are two icons (back and refresh), and at the bottom right is the text 'Individual Scoreboard'.

Filters include Hierarchy, Status, Color and # of users to display.

P. Action Risk Matrix

This widget displays #s of actions that are linked to a Findings/Risk with a risk rating assigned to it. It uses your organization's risk matrix. The #s are live links to drill down to see a listing of these actions in the Action register.



Filters/Configuration

The Filters/Configuration panel for the Action Risk Matrix includes the following settings:

- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Action Status: Complete
- Action Categories: Select options

Navigation icons (back, refresh) and the widget title "Action Risk Matrix" are also visible.

Hierarchy filters available along with Action Status and Action Categories. (It would be useful to have Date filters here.)

Q. Action Status by Org Unit and Additional Info

This widget displays #s of actions that contain values for any Additional Information field (created in Admin > Custom Fields) by Org Unit.

Org Unit	Hierarchy of Controls		
	Total	Complete	Overdue
Airways Inc.	0	0	0
Contractors	1	0	1
Corporate	0	0	0
Maintenance	0	0	0
Operations	5	1	4
Projects	0	0	0
XYZ Energy Corporation	0	0	0

Filters/Configuration

Action Status by Org Unit and Addi

Org Unit: All Org Units

Include Sub Org Unit:

Period (days): Specify period

From Date: 01 Sep 2015

To Date: 04 Sep 2019

Additional Info: Hierarchy of Control

Additional Info Value: +


Name	Additional Info Value
Hierarchy of Controls	Administration;Elimination;Engineering;PPE;Substitution

Action Status by Org Unit and Additional Info


Filters include Org Unit (Note there is no Entity filter here), sub Org Unit, Date Range, Additional Information field.

VII. Obligations


Select Widget




Workflow (13)




Event (39)




Finding (18)




Training (4)




Entity (1)




Action (17)




Obligation (9)



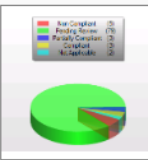
Document (3)




Additional Info Field (2)



Obligation Analysis by Job Title




Obligation Analysis by Status



Obligation Analysis by Topic

Status	Source
Open	17
Assigned	4
Approved	3
Applied for Renewal	2
Expired	13
Training in 30 Days	3
Training in 90 Days	1

Source by Status




Source by Status Pie Chart

Name	Total	Comp	Ren	Back	Unpaid SDR
uscdm	1				1
WuFirst	9	1	1	1	1
Topic	6	1	1	1	0
obligation	48	1	1	1	48
training	1				1
authority	1	1			

Obligation By Instrument

Topic	Total	Comp	Ren	Back	Unpaid SDR
Topic 1	4	1	1	1	2
Topic 1.3	0				
Topic 1.2	1				1
Topic 1.1	1				1
A	7	1	1	1	4
all	1				1

Obligation By Topic

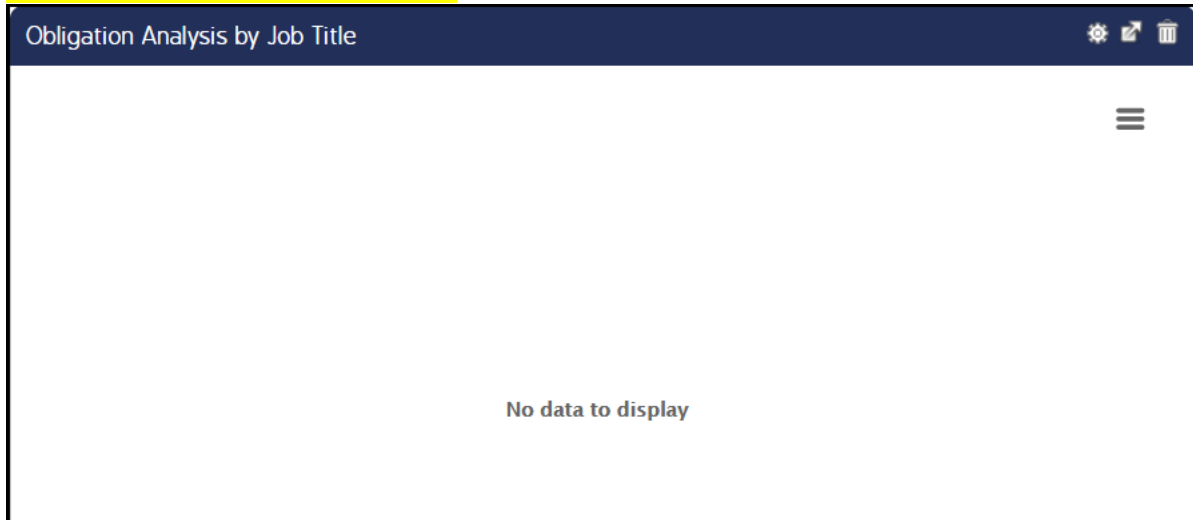


Source List

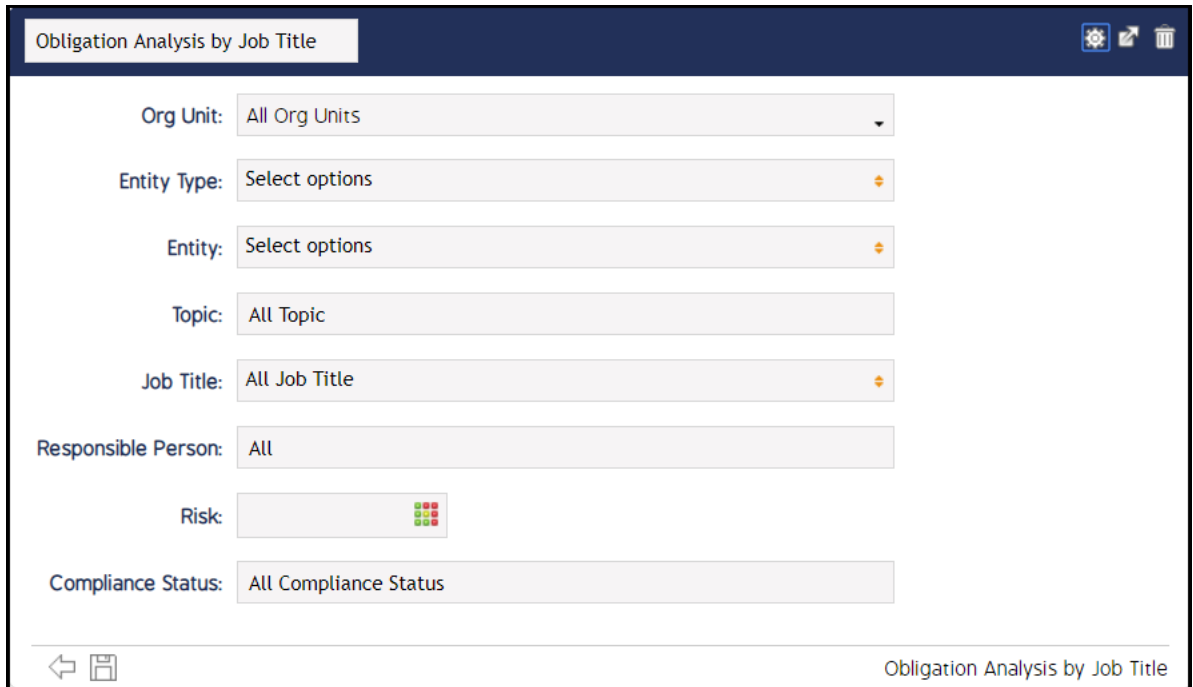
OK | Cancel

A. Obligation Analysis by Job Title

Can't get this widget to display data...

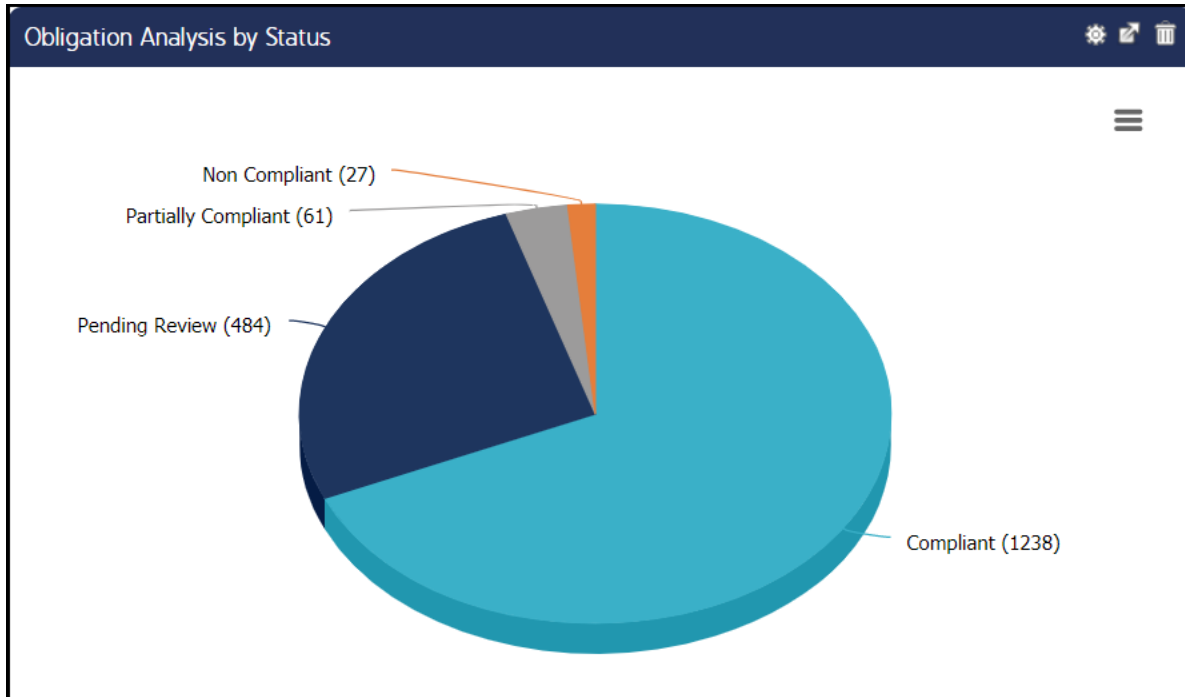


Filters/Configuration



B. Obligation Analysis by Status

This widget displays a pie chart of #s of Obligations by status.



Filters/Configuration

A configuration panel titled "Obligation Analysis by Status" with a settings icon, share icon, and trash icon in the top right corner. It contains several filter fields:

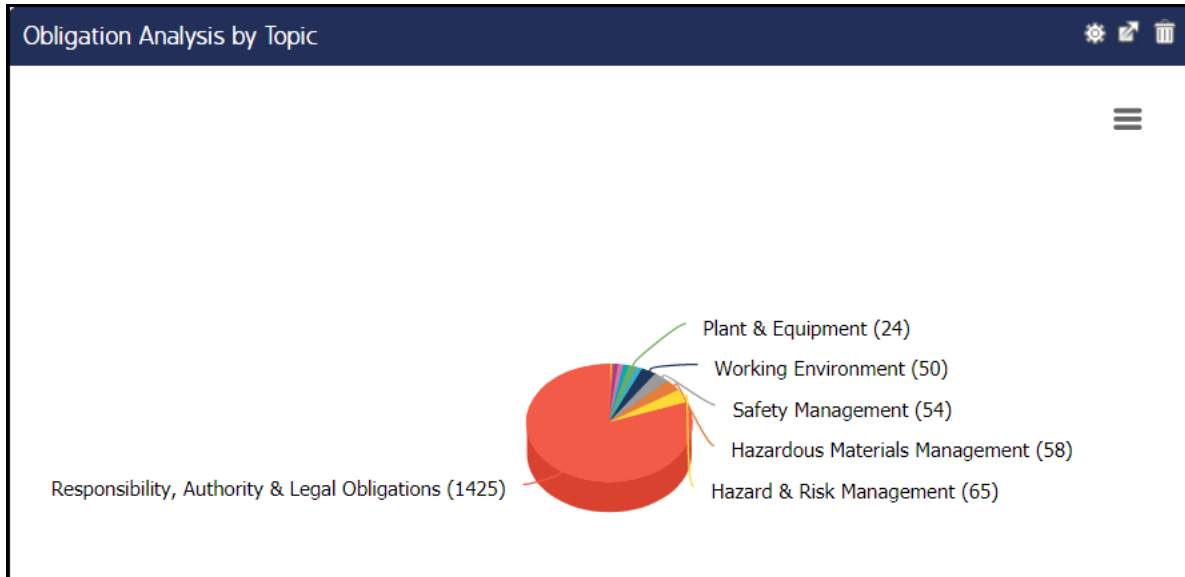
- Org Unit: All Org Units (dropdown)
- Entity Type: Select options (dropdown)
- Entity: Select options (dropdown)
- Topic: All Topic (input)
- Role: All Job Title (input)
- Responsible Person: All (input)
- Risk: [Color-coded grid icon]
- Compliance Status: All Compliance Status (input)

At the bottom left, there are icons for back and save. At the bottom right, the text "Obligation Analysis by Status" is displayed.

Hierarchy, Topic, Role (which only allows selection of Job Titles NOT Roles), Responsible Person (can select Current User), Risk, and Compliance Status.

C. Obligation Analysis by Topic

This widget displays a Pie Chart breakdown of all the Topics selected within Obligation records.



Filters/Configuration

The screenshot shows the "Obligation Analysis by Topic" widget with various filter options:

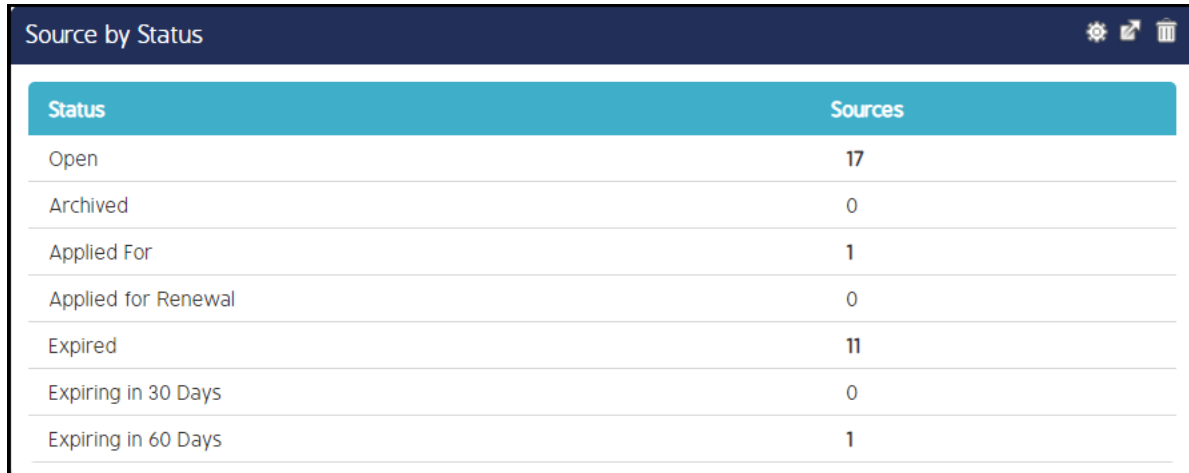
- Org Unit: All Org Units
- Entity Type: Select options
- Entity: Select options
- Topic: All Topic
- Role: All Job Title
- Responsible Person: All
- Risk: [Color-coded grid]
- Compliance Status: All Compliance Status
- Show Sub Topics:

Navigation icons (back, refresh) are visible at the bottom left, and the widget title "Obligation Analysis by Topic" is at the bottom right.

Filters available are: Hierarchy, Topic, Role (again, this is the Job Title, NOT the role), Responsible Person (can select Current User), Risk, Compliance Status, and a checkbox to show Sub Topics or not.

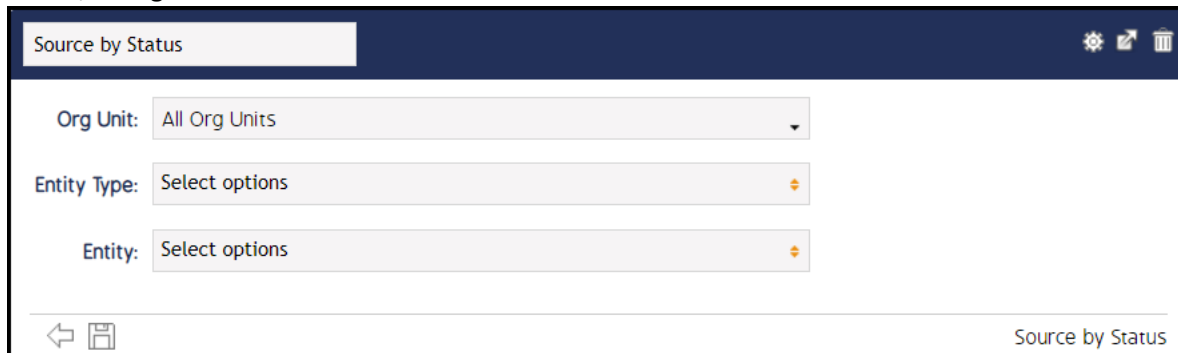
D. Source by Status

This widget displays #s of Sources in various pre-determined statuses in a table format. The format and Statuses displayed are invariable.



Status	Sources
Open	17
Archived	0
Applied For	1
Applied for Renewal	0
Expired	11
Expiring in 30 Days	0
Expiring in 60 Days	1

Filters/Configuration



Source by Status

Org Unit: All Org Units

Entity Type: Select options

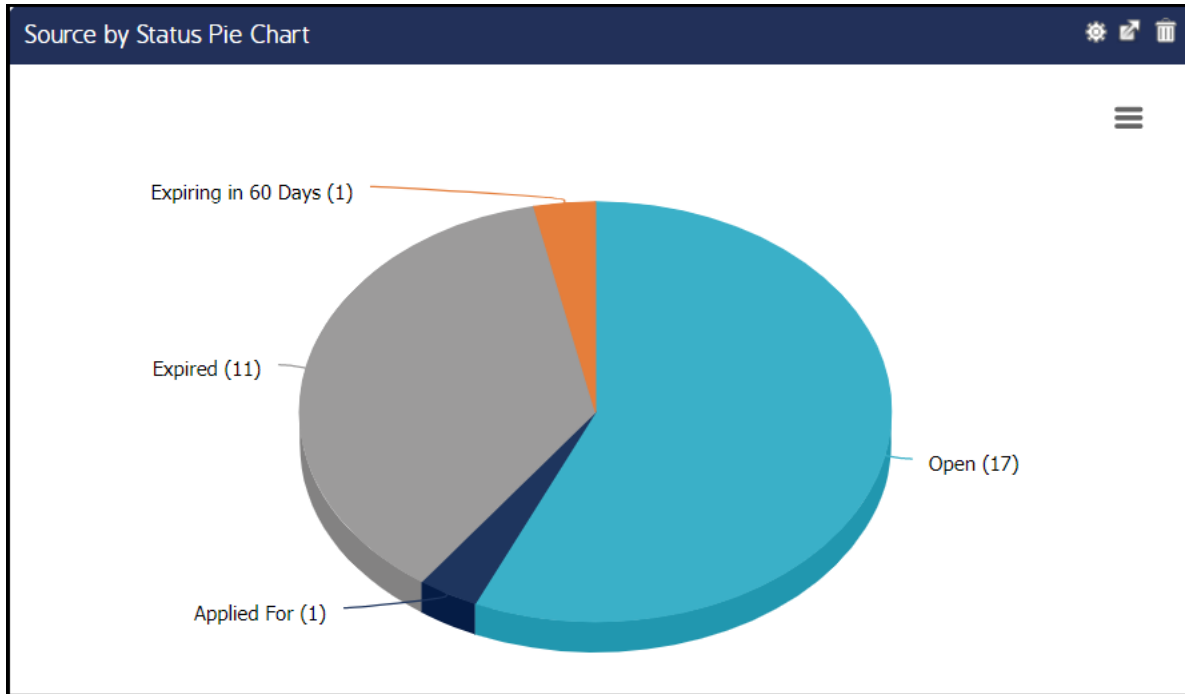
Entity: Select options

Source by Status

The only filters available are Hierarchy filters. It could be useful to have the other filters available such as Responsible Person, Authority, and Source Type.

E. Source by Status Pie Chart

This widget displays the same data as the Source by Status widget above, except it displays in a Pie Chart format.



Filters/Configuration

Source by Status Pie Chart

Org Unit: All Org Units

Entity Type: Select options

Entity: Select options

Source by Status Pie Chart

The only filters available are Hierarchy filters. It could be useful to have the other filters available such as Responsible Person, Authority, and Source Type.

F. Obligation By Instrument

This widget displays #s of Total Obligations, Compliant Obligations, Non Compliant Obligations, along with the risk of each obligation. You can optionally show a column indicating if the Source had been updated within a certain # of days. This data is displayed in a list format, by Instrument (Source record).

Name	Total Obligations	Compliant	Non Compliant	Risk	Updated in last 30 days
Dangerous Goods (Road and Rail Transport) Act 2008	21	17			
Dangerous Goods (Road and Rail Transport) Regulation 2014	147	131	2	Medium (8)	
Explosives Act 2003	15	11	1		
Explosives Regulation 2013	72	66			
Public Interest Disclosure Act 2012	23		2	Extreme (25)	
Rail Safety (Adoption of National Law) Regulation 2012	15				
Rail Safety National Law (NSW)	106	98		High (18)	
Rail Safety National Law National Regulations 2012	27	27			
Work Health and Safety (Mines) Act 2013	27	27			
Work Health and Safety (Mines) Regulation 2014	177	154	3	Extreme (23)	

[← Previous](#)
1/2
[Next →](#)

Filters/Configuration

Obligation By Instrument

Entity:

Topic:

Role:

Responsible Person:

Authority:

Show if Updated: Show All Period

Obligation By Instrument

Filters available are: Hierarchy, Role (again, Job Titles are displayed, NOT roles), Responsible Person (Current User may be selected), Authority, and a checkbox controlling a column that indicates whether the Source has been updated within the specified # of days.

G. Obligation By Topic

This widget displays a listing of Topics, the # of Obligations each Topic is assigned to, the Compliance status of the Obligations, and the highest Risk associated with each Obligation.

Topic	Total Obligations	Compliant	Non Compliant	Risk	Updated in last 30 days
Air Quality	0				
Audits & Assessments	2		2	Medium (8)	1
Contractor Management	4			Medium (12)	
Contractor & Supplier Management	3			Medium (12)	
Labour Hire	1				
Corporate & Capital Projects	19	1		High (16)	
Building Works	18	1		High (16)	
Demolition and Decommissioning	1				
HSE Aspects of Design and Development	0				
Corporate Development & Capital Works	0				

← Previous
1/15
Next →

Filters/Configuration

Obligation By Topic

Entity:

Topic:

Role:

Authority:

Show if Updated: Show All Period

Obligation By Topic

Filters available are: Entity (Org Unit is NOT available), Topic (only 1 Topic may be selected, so you get all or one – preferably you could select multiple topics here), Role (again, this is the Job Title, NOT the role), and a checkbox controlling a column that indicates whether the Obligation has been updated within the specified # of days.

H. Source List

This widget displays a listing of all Sources filtered, like the Source register. These are listed invariably in 20 Sources per page.

ID	Org Unit	Doc	Source Type	Source Name	Entity	Authority	Oblig	Sour Date	Sour Expi	Sta
234	Australian Operations		Agreemen	Example Source	Manufacturing Plant Site	ACT Government	0	20 Dec 2016	21 Dec 2017	Expire
233	Australian Operations		Permit	Blasting Permit 12345	Mine Site	Queensland Government	0	16 Jun 2016	01 Nov 2019	Expir in 60 Days
232	Australian Operations		Stakeholde	TP - Stakeholder Engageme	Mine Site		0	15 Jun 2016	15 Jun 2016	Expire
222	Australian Operations		Regulation	Rail Safety National Law National Regulations 2012	Mine Site		27	07 Mar 2016		Open
215	Operations		Regulation	WORK HEALTH AND SAFETY Regulations 2011 (CTH)			0	09 Mar 2015	22 Mar 2015	Expire
25				Universal Waste			0	28 Apr 2013	01 May 2013	Expire
131				Permit 123-987 Enviro Permit			0	31 Oct 2012	01 Nov 2013	Expire

Page: 1 of 2

1 2 Next

Filters/Configuration

Source List	
Show Sources:	By Entity
Org Unit:	All Org Units
Entity Type:	Select options
Entity:	Select options
Type:	All Source Types
Status:	All Statuses
Order By:	Source Date
	Descending

Source List

Filters available are: Show Sources (By Entity, By Person, or By Role) (ONLY By Entity seems to be working), Hierarchy, Type, Status and a field controlling the Order By options.

I. Obligation List

This widget displays a listing of all Obligations filtered, like the Obligation register. These are listed invariably in 20 Obligations per page.

ID	Doc	Source Type	Source Name	Topic	Description	Risk	Author	Role	Action
1168	68	Regulator	Work Health and Safety Regulator	Legal Requirements	(1) The regulator may exempt a person or class of persons from compliance with a provision of this Regulation requiring the person or class of persons to hold a high risk work licence. (2) The ex...		NSW Government		
1200	47	Regulator	Dangerous Goods (Road and Rail Transport) Regulator	Legal Requirements	(1) A person must not apply any marking required by Part 6 of the ADG Code on packaging if the packaging is not of a design approved under clause 49. Maximum penalty: 40 penalty units for an in...		NSW Government		
552	73	Regulator	Rail Safety National Law (NSW)	Legal Requirements	(1) This section applies in respect of an accredited person if- (a) the Regulator considers that the accredited person- (i) is no longer Obligatable to demonstrate to the satisfaction of th...		NSW Government		
1126	49	Regulator	Work Health and Safety Regulator	Legal Requirements	For the purposes of clause 497 (1) (b), in relation to a Class B asbestos removal licence the regulator must be satisfied that each supervisor named by the applicant: (a) is at least 18 years of ag...		NSW Government		

Page: 1 of 91

1 2 3 4 5 6 7 Next

Filters/Configuration


Obligation List	
Show Obligations:	By Entity
Org Unit:	All Org Units
Entity Type:	Select options
Entity:	Select options
Type:	All Source Types
Topic:	All Topic
Authority:	All Authorities
Compliance Status:	All Compliance Status
Order By:	Name
	Descending


Obligation List


Filters available are: Show Obligations (By Entity, By Person, or By Role) (ONLY By Entity seems to be working correctly – By person shows the same display as by Entity, yet no one is listed in the Responsible Person column), Hierarchy, Type, Topic, Authority, Status and a field controlling the Order By options.


VIII. Documents


Select Widget


 Workflow (13)


 Event (39)


 Finding (18)


 Training (4)

 Entity (1)

 Action (17)

 Obligation (9)


 Document (3)

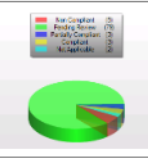
 Additional Info Field (2)

Folder Name	Documents
Folde 5	5
Folder 1	2
Folder	1
Inbox	14

Document folders

Document folders

 Document Navigator

 Policy Attestation & Compliance Management

OK | Cancel

A. Document Folders

This widget lists all of the folders in the system and the # of documents in each folder.

Document folders	
Folder Name	Documents
[-] 01 Policy and Manual	45
101 Policy	3
[-] 03 Forms and Templates	2
Audits and Inspections	1
[-] 04 Procedures and Processes	1
401 Procedure	4
402 Safe Work Instructions	6
05 Planning and Risk Management	1
06 Emergency Management	1
07 Monitoring and Improvement	1
08 Communication and Training	6
[-] 09 Reference Materials (inc ISO Certificates)	0
[-] 901 CMO Best Practice Reference Material	1
Take 5 Reference Material	2
SDS	3
[-] 10 Signage and Notices	0
Monthly Notices	5

Filters/Configuration

Document folders

This widget has no special settings

Document folders

No Filters or Configuration.

B. Policy Attestation & Compliance Management (same as in the Training section)

This widget allows you to search items in the Documents module. The same could be done in the Documents register, but this widget can be made available to users who don't have access to the Documents register.

The screenshot shows the 'Policy Attestation & Compliance Management' widget. At the top, there is a search bar labeled 'Policy/Document Search' and a dropdown menu set to 'All Document Types'. A 'Search' button is located to the right of the dropdown. Below the search area, there are three sections: 'Rules & Policies to be Attested', 'Attested Rules & Policies', and 'Whistle Blowing'. The 'Attested Rules & Policies' section contains a list of three items, each with a document icon: 'Take 5 Hazards and Controls', 'Health and Safety Policy.doc (1)', and 'SWP - Scissor Lifts.doc (1)'. The 'Whistle Blowing' section has a green plus sign icon.

Filters/Configuration

The screenshot shows the 'Filters/Configuration' section of the widget. It features three filter fields: 'Org Unit' with a dropdown menu set to 'All Org Units', 'Entity Type' with a dropdown menu set to 'Select options', and 'Entity' with a dropdown menu set to 'Select options'. Below these fields, there are three checkboxes, all of which are checked: 'Policies to be Attested:', 'Attested Rules & Policies:', and 'Whistle Blowing:'. At the bottom left, there are icons for back and save. At the bottom right, the text 'Policy Attestation & Compliance Management' is displayed.

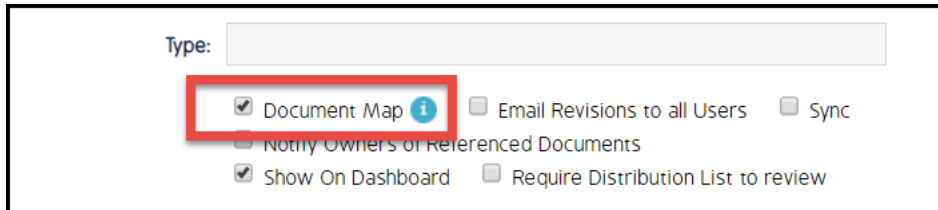
You can filter by hierarchy as well as 3 flag items.

C. Document Navigator

The purpose of this widget is to allow users to find documents more easily.














When creating a Document record, if the checkbox “Document Map” is checked, it will display in the dropdown list in the Document Navigator further below.




This widget does not appear to be working because the top screen is always empty.

IX. Additional Info Field

Select Widget

 Workflow (13)	 Entity Additional Info The widget will show charts showing how many Entities have each Additional Info Field.	 Org Unit Additional Info The widget will show charts showing how many Org Units have each Additional Info Field.
 Event (39)		
 Finding (18)		
 Training (4)		
 Entity (1)		
 Action (17)		
 Obligation (9)		
 Document (3)		
 Additional Info Field (2)		

OK |  Cancel

A. Entity Additional Info

This widget will display Additional Info data (Custom Fields) that are created in the Entity record. It can be displayed in a List, Pie Chart, or Bar Chart.

Value	Count
12345	6
54321	4
12321	2
[Blank]	14

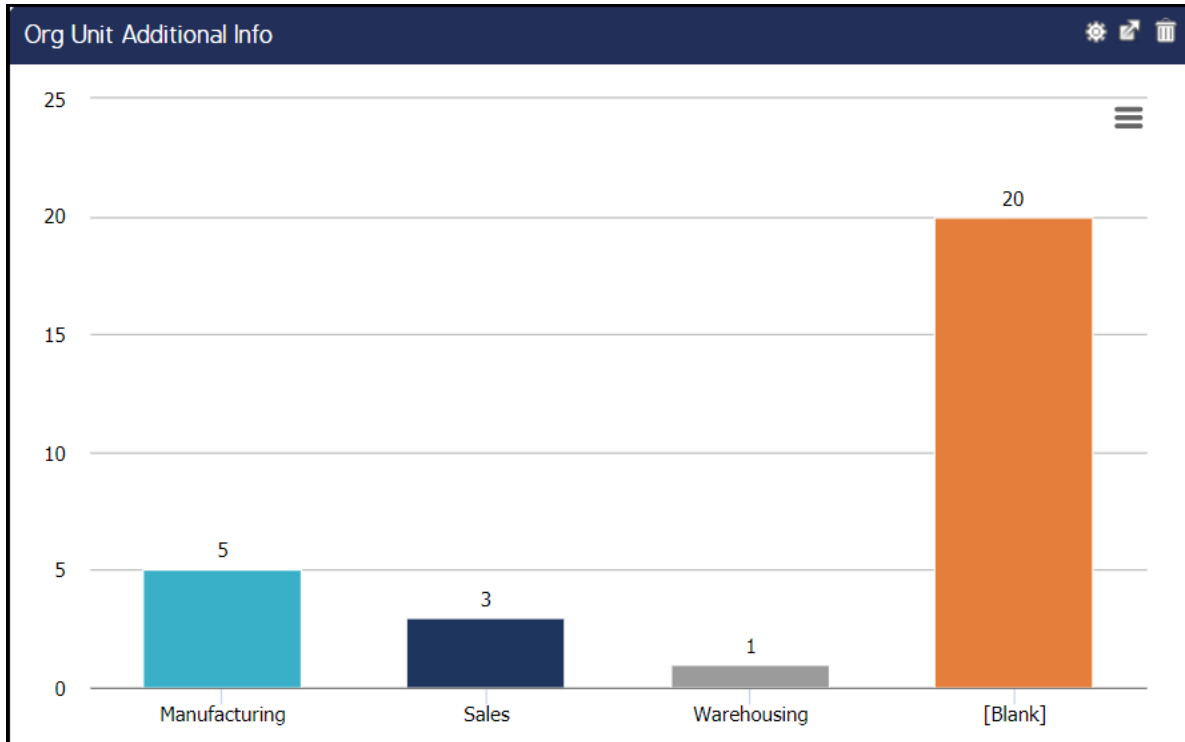
Filters/Configuration

Entity Additional Info	
Org Unit:	All Org Units
Entity Type:	All Entity Types
Additional Info Field:	Account Code
Chart Type:	<input checked="" type="radio"/> List <input type="radio"/> Pie <input type="radio"/> Bar

Filters available are for Org Unit, Entity Type, and Additional Info Fields. You can also filter on Chart Type: List, Pie, or Bar. **There is no filter for Entity ?? (The Org Unit widget has an Org Unit filter.)**

B. Org Unit Additional Info

This widget will display Additional Info data (Custom Fields) that are created in the Org Unit record. It can be displayed in a List, Pie Chart, or Bar Chart.



Filters/Configuration

A configuration panel for the "Org Unit Additional Info" widget. It includes a title bar with settings, share, and delete icons. Below the title bar, there are three main configuration sections: "Org Unit" with a dropdown menu set to "All Org Units", "Additional Info Field" with a text input set to "Activity", and "Chart Type" with three radio buttons: "List", "Pie", and "Bar", where "Bar" is selected. At the bottom left, there are icons for back and save. At the bottom right, the text "Org Unit Additional Info" is displayed.

Filters available are for Org Unit and Additional Info Fields. You can also filter on Chart Type: List, Pie, or Bar.