



HSEQ Management Software

Classic V4 Field Observations Manual

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myosh Dashboard

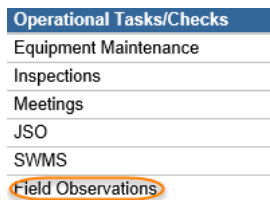
1. Introduction


Field Observation in myosh allows the user to record observations made in the field, there are two types of field observations; Safe Condition/Behaviour and Unsafe Condition/At Risk Behaviour.

2. Creating a Field Observation

To create a Field Observation:

1. Click on Field Observations under the “Operational Tasks/Checks” module on the main myosh menu.



2. Click on the 

Hierarchy

Hierarchy			
Division:	<input type="text"/>	Department:	<input type="text"/>
Site:	<input type="text"/>	Location:	<input type="text"/>

This information is automatically inserted and the information used is that of the person creating the document. These default values can be changed by selecting the appropriate values from the drop down lists.

Details

Details			
Visit Type:	<input type="text"/>	Date:	19/10/2015 16
Area Manager:	<input type="text"/>	Time Spent (minutes):	<input type="text"/>
Leader:	<input type="text"/> ADMIN Myosh ARCHIVED Frequent MYOSH 1 Power	People Observed:	<input type="text"/> ADMIN Myosh ARCHIVED Frequent MYOSH 1 Power
Task(s) Observed:	<input type="text"/>		
Area Manager Notified:	<input type="radio"/> Yes <input type="radio"/> No		

3. Select the Visit Type from the drop down list.

4. Select the date of the Observation using the date picker
5. Select the Area Manager from the drop down list
6. Enter the Time Spent
7. Select the Leader and People Observed by holding down the control key and clicking on relevant names
8. Enter the task/s that have been observed.
9. Answer by clicking into the relevant radio button (circle) if the Area Manager has been notified.

Observations

Observations Create Observation				
Safe Condition / Behaviour Observed				
Threat Type	Sub Type	Mechanism	Details	Attachments
Unsafe Condition / At Risk Behaviour Observed				
Threat Type	Sub Type	Mechanism	Details	Attachments

10. Click on Create Observation and the following will be displayed.

Exit	Submit	Print	Help	Observation
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Composed: **22/09/2015** Created by: **Megan Edwards**

Details	
Observation:	<input type="radio"/> Recognition and achievement <input type="radio"/> At risk behaviour or hazardous condition
Observation Description:	<div style="background-color: #ffffcc; height: 40px;"></div>
Type:	<div style="background-color: #ffffcc; height: 15px;"></div>
Sub Type:	<div style="background-color: #ffffcc; height: 15px;"></div>
Mechanism:	<div style="background-color: #ffffcc; height: 15px;"></div>

Associated Hazard Select Hazards Log Hazard	
Create Action	

11. Select the relevant observation by clicking in the radio button (circle)
12. Enter the Observation Description.
13. Select from the drop down list the following:
 - a. Type
 - b. Sub Type
 - c. Mechanism

Associated Hazards

There are two options for Associated Hazards:

Select Hazards

Click on the "Select Hazards" button and a page will open displaying all Hazards in the system. Simply click in the check box of any relevant Hazards and click on "Submit". Any Hazards chosen will be displayed under this section.

Log Hazard

Click on the “Log Hazard” button and a new Hazard document will be displayed. See the section about how to log a hazard. These Hazards are saved in the Hazard database and will also be visible under this section.

Note: Within the Hazards that are linked to an incident, the details of the incident will appear in the bottom section of the hazard under the Associated Incidents section.

Associated Actions


To create an action in relation to the Incident, click on the “Create Action” button and a new Action document will be displayed. See the section about how to Log an Action. These Actions are saved in the Actions Database and will also be visible under this section.

Note: Within the Actions that are linked to an incident, the details of the incident will appear in the bottom section of the Action under the Associated Application section.

14. Click on Submit

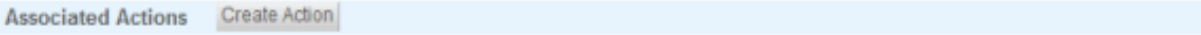
Note: Once the Observation has been submitted then the information will be displayed under the relevant heading.

Comments



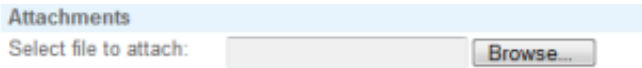
15. Enter into the text box any comments.

Associated Actions



To create an action in relation to the Field Observation, click on the “Create Action” button and a new Action document will be displayed. See the Power User Manual section about how to Log an Action. These Actions are saved in the Actions Database and will also be visible under this section.

Attachments



The Attachment section is where relevant documents can be uploaded. Click on browse, select from the Explorer screen the relevant file and click ok. The file location will appear in the text box and once the JSO or safety observation has been submitted the document will be uploaded to the myosh server.

16. Click on 

3. Finding Field Observations

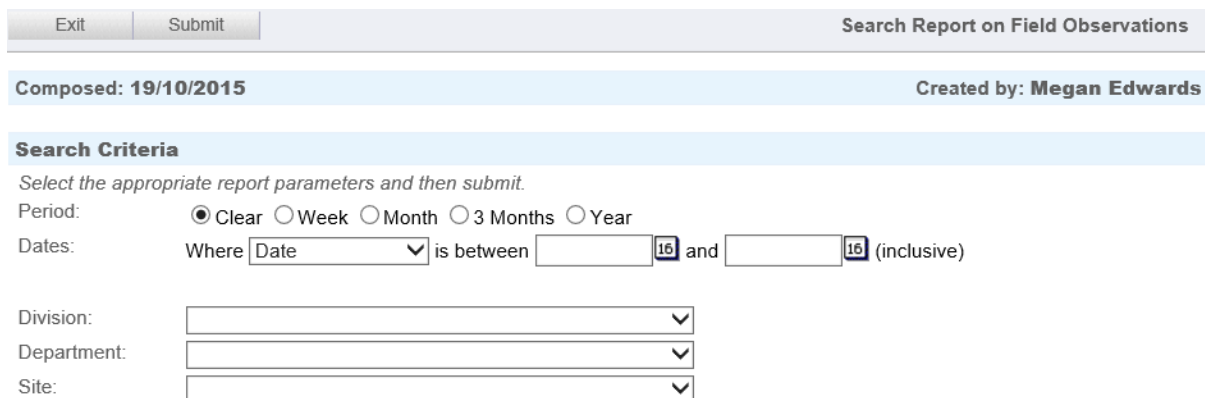
Search Report

Use the Search Report option, to find Field Observations with specific criteria.

1. Click on Search Report on the navigation panel

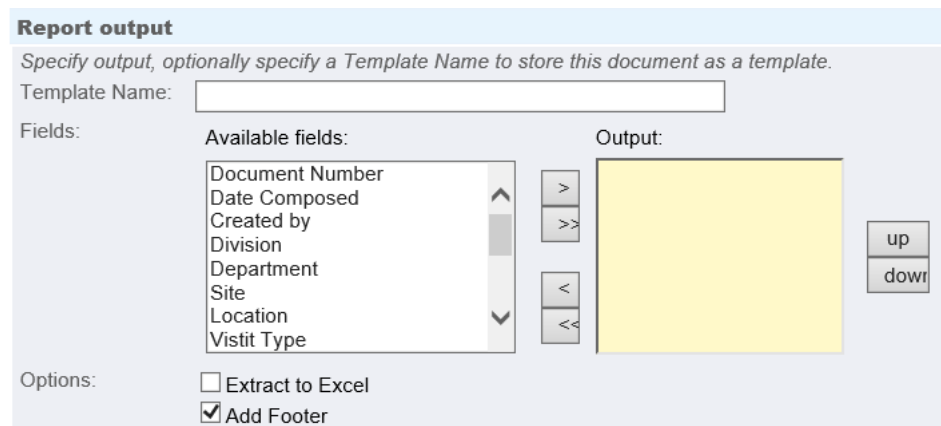


2. Click on **New Record** and the following screen will be displayed





3. Enter the Search Criteria: Either select from the drop down lists or radio buttons (circles) or clicking and highlighting relevant fields.

The next step of the process is to consider and select the Report Output.



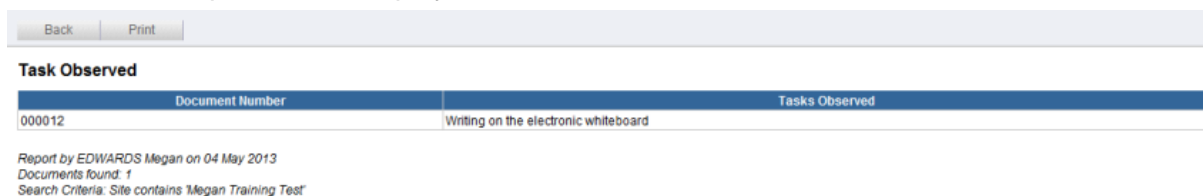
Report Output Component	Description
Template Name	If this is a report that will be run on a regular basis it can be saved as template by entering a name in this field.
Available Fields	Fields that are available to be included in the report
Output	Fields that will be displayed in the report

	<p>Transfer highlighted fields from Available Fields to Output</p> <p>Transfer all fields from Available Fields to Output</p> <p>Transfer highlighted fields from Output to Available Fields</p> <p>Transfer all fields from Output to Available Fields</p>
	<p>By highlighting a field and clicking on these buttons it will change the order of the report. Click on up and the field will appear above the one it was below. Click on down and the field will appear below the one it was above.</p>
<p>Extract to Excel</p>	<p>This extracts the report to Excel. The matrix can only be extracted when the Show Dates button is ticked.</p>
<p>Add Footer</p>	<p>This adds to the footer of the report the search criteria.</p>

4. Enter Template Name
5. Select the Available fields by clicking on them, for multiple selections hold down the CTRL key and click on them.
6. Once highlighted click on the relevant arrow – as explained above
7. Change the order by using the up and down buttons
8. Click on Submit

Note: By including the Document Number in the report, the number becomes a hyperlink back to the original document.

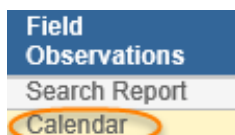
The returned report will be displayed as below.



Note: If the returned result isn't what was required, click on the "back" button and update the search criteria and output then resubmit. The report can also be printed by clicking on "Print".

Calendar

To be able to view the observations that have been carried in a calendar view, click on Calendar under the blue Field Observation header.



This will display a monthly view. If a different monthly view is required, click on the calendar icon and the return display will show the months of the year, click on the relevant month to display it.

All By

To display all the Field Observations in various orders, click on the relevant field under the “All” heading.

All
By Site
By Number
By Leader
By Location

The documents will then be displayed on the right hand side of the screen sorted by that field.

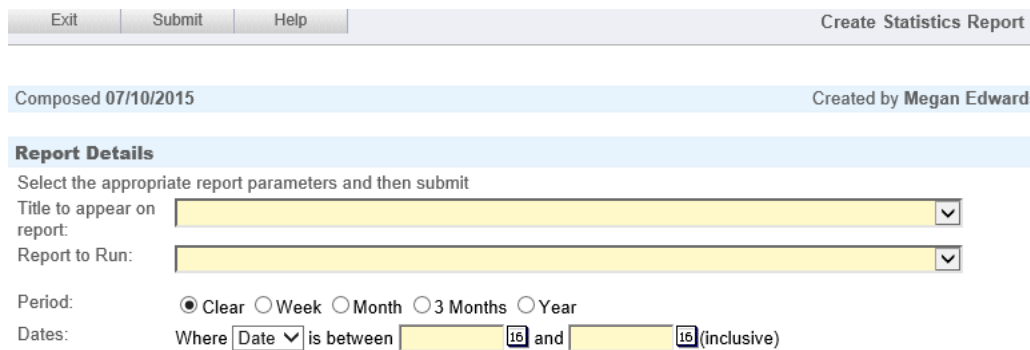
Reports

Use the reports to display Field Observation statistics in graphical format.

1. Click on By Date under the Reports heading



2. Click on **New Record** and the following screen will be displayed



Exit Submit Help Create Statistics Report

Composed 07/10/2015 Created by Megan Edwards

Report Details

Select the appropriate report parameters and then submit

Title to appear on report:

Report to Run:

Period: Clear Week Month 3 Months Year

Dates: Where is between and (inclusive)

3. Select from the drop down lists:
 - a. Title to appear on report
 - b. Report to Run

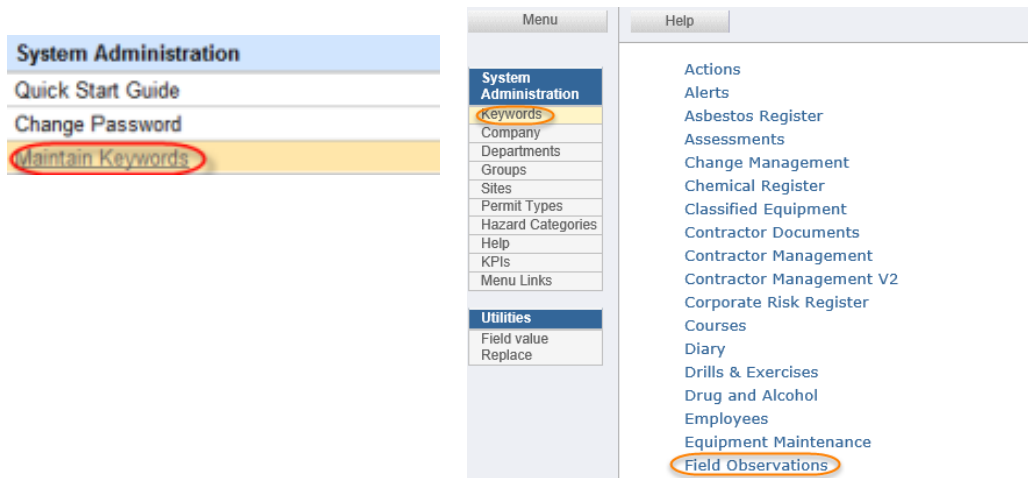
Note: Depending on which report is selected an additional selection field will appear for either Leaders or Site. This field will need to be selected prior to submitting the form.

4. Select the Period by clicking in the relevant radio button. If the periods displayed don't cater for the period needed click in the radio button next to Clear and then use the date pickers to select the period.
5. Click on Submit.

Once Submit is clicked on myosh will refresh the screen and then display the graph. This graph can either be printed or exported to PDF or PNG.

4. Keywords

All keywords can only be changed by Administrators, the ones for the Field Observation module can be located at:



The screen that will be displayed is as shown below.



To change the information, click into the field, place the cursor where the new value is to be entered and enter it. Once the changes have been made, click on the submit button.

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