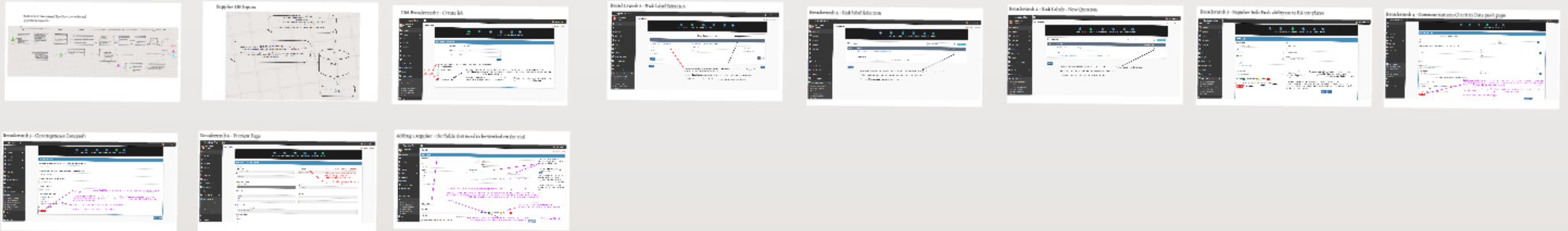
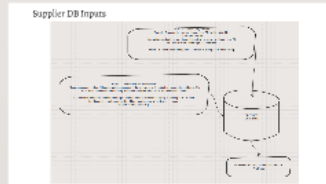
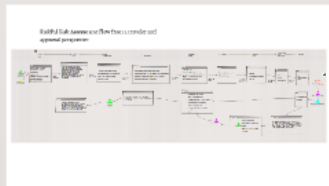


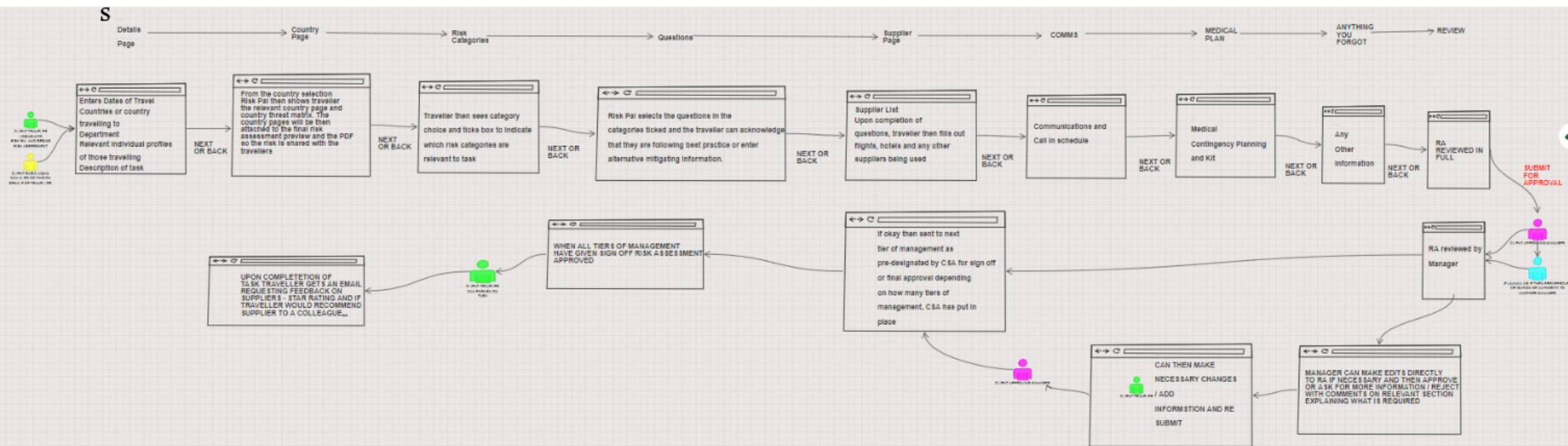
## RiskPal CSA Template Creation and supplier DB

[illegible]

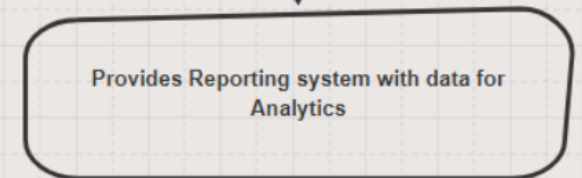
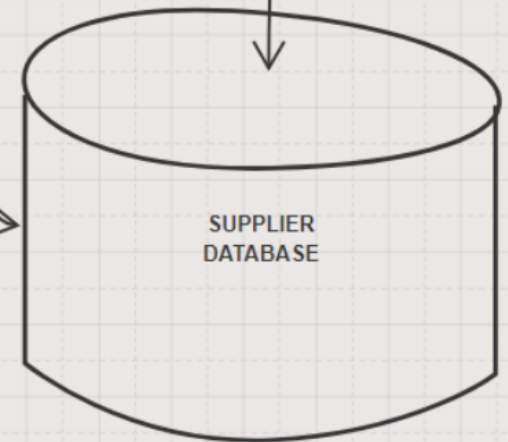
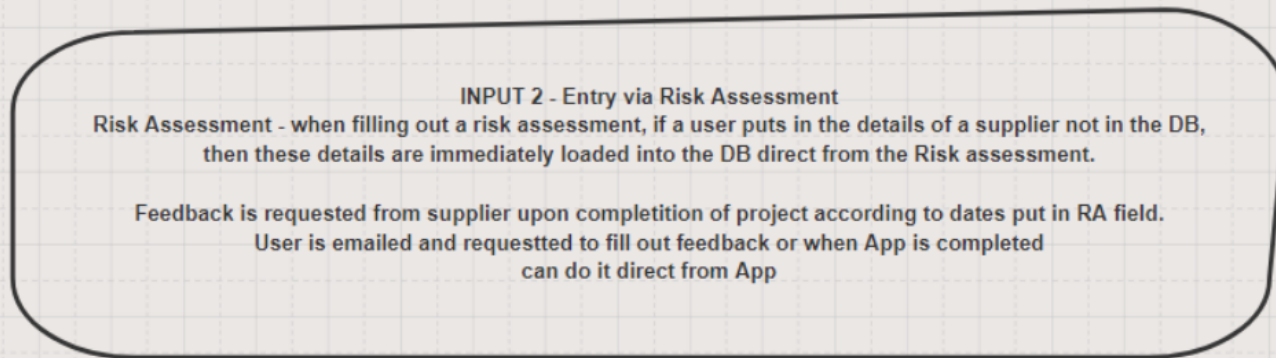
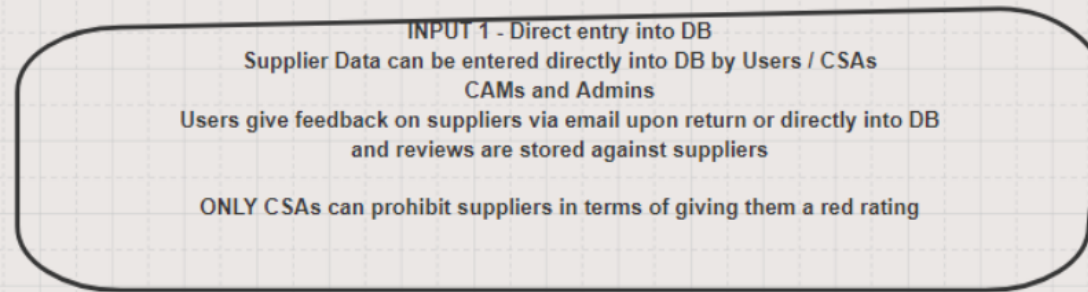
# RiskPal CSA Template Creation and supplier DB



## RiskPal Risk Assessment Flow from a traveler and approval perspective



# Supplier DB Inputs



# CSA Breadcrumb 1 - Create RA

Organization Admin

Bob Richards  
Online

Dashboard

Countries

My Profile

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Create Risk Assessment(s)

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Rejected RA Archive

Master Admin templates

Ra Timer

Logs

Bob Richards

Ra details

Dashboard > Ra details

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CREATE RA

RISKS AND MITIGATION

SUPPLIER INFO

COMMUNICATIONS

CONTINGENCIES

PREVIEW

Add Risk Assessment

RA Name

Earthquake Template

Department

space camp, Tech Team, test qa

Country

Select Country

Next

Check these pages if you want them to appear in the risk assessment

☒ Risks and Mitigation

☒ Supplier Information

☒ Communications

☒ Contingencies

☐ Country Page Profile

So Currently all breadcrumbs in the risk assessment process can be controlled by CSA / RP Staff apart from the country profile. This comes in no matter what. Can we make this optional as well, because if the template is designed for say the UK - there really is no need to include it in the RA.

After trial we may want to expand on this, so that the CSA can actually select which countries they want the country page breadcrumb to appear for. This would be we would need a tick box system for every country in the system.

Position at top of options

## Bread Crumb 2 - Risk Label Selection

Organization Admin

Bob Richards  
Online

- Dashboard
- Countries
- My Profile
- Risk Labels
- Questions
- Users
- Departments
- Suppliers
- Medical Info Requests
- Resource Library
- Reports
- Track & Manage
- Risk Assessment(s)
  - Create Risk Assessment(s)
  - List Risk Assessment(s)
  - Submitted Risk Assessment(s)
  - Rejected RA Archive
  - Master Admin templates
  - Ra Timer

Bob Richards

Dashboard > Ra details

### Ra details

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CREATE RA RISKS AND MITIGATION SUPPLIER INFO COMMUNICATIONS CONTINGENCIES PREVIEW

Select Correct Risk Label

Search

Risk Labels		
Earthquake And Natural Disasters	Adverse Weather, Storms And Hurricanes	Snatching
Undercover	Test Label	Tom Test
Armed	Kidnaping	Aviation Charter
Office Security		

< 1 2 3 >

10 25

< Back

Next >

Labels should be ordered alphabetically. And we want as many as possible to appear on the page. We should not have to tab between pages if possible

Also there should be a keyword search function so the CSA/RP Staff can find a risk label easily.

As discussed UX is generally awful in this section so any improvements would be good.

# Breadcrumb 2 - Risk label Selection

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Bob Richards  
Online

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Master Admin templates

Ra Timer

Bob Richards

Dashboard > Ra details

Ra details

123456

CREATE RARISKS AND MITIGATIONSUPPLIER INFOCOMMUNICATIONSCONTINGENCIESPREVIEW

Question

Search by question

New Question

S No.	Question	Assign Questions
1	Will you be working near damaged buildings or infrastructure? <div><div>Risk Labels</div><div>earthquake and natural disasters , Adverse weather, storms and hurricanes</div></div>	<input checked="" type="checkbox"/>

Back

When tick boxing a question to include in the RA template, there is no indication that you have actually included it.

And the back button should say Return to Risk Labels as it is confusing. it is not intuitive.

There should also be a next button to continue to supplier info

# Breadcrumb 2 - Risk Labels - New Question

Organization Admin

Bob Richards

Online

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Ra details

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CREATE RA

RISKS AND MITIGATION

SUPPLIER INFO

COMMUNICATIONS

CONTINGENCIES

PREVIEW

Question

Search by question

New Question

S No.	Question	Assign Questions
1	<div>Will you be working near damaged buildings or infrastructure?</div> <div><div>Risk Labels</div><div>earthquake and natural disasters ,</div><div>Adverse weather, storms and hurricanes</div></div>	<div><input checked="" type="checkbox"/></div>

Back

When tick boxing a question to include in the RA template, there is no indication that you have actually included it.

And the back button should say Return to Risk Labels as it is confusing. it is not intuitive.

There should also be a next button to continue to supplier info



The logic behind Breadcrumbs 3/4/5 is the CSA to push information at the users so they do not need to fill it out themselves thus speeding up the RA process. At the moment if the CSA does this then that information just appears in the RA above the same empty fields which the user is still expected to fill out. If the CSA populates the breadcrumbs, then the corresponding breadcrumb fields in the template should be pre-populated. Not duplicated. The duplicated extra fields is confusing to the user and very unattractive making each breadcrumb much longer than necessary.

For the trial we will simply not push this data to the users, but long term we will need the Ra template to have this ability.

# Breadcrumb 3 - Supplier Info Push ability on to RA templates

Organization Admin

Online

Dashboard

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Medical Info Requests

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CREATE RA

RISKS AND MITIGATION

SUPPLIER INFO

COMMUNICATIONS

CONTINGENCIES

PREVIEW

Add Supplier

Supplier Name

Enter Supplier Name

Country

Select Country

City

Enter City

Recommended by

Enter Sourced by

currency

Cost

Enter Cost Per Unit/Day If Known

Description

Enter Supplier Description

Service provided

select service provided

okay to use

use with caution

prohibited

Want to share this information with traveller

No

For the moment, leave this breadcrumb untouched. This is how the CSA can push a supplier on the user by having it put on the risk assessment. But for the trial we have agreed to leave this. This yes/no tab means we do not need to see this information in the RA if we keep it on No.

Long term in the supplier DB, we need the CSA to be able to distinguish between Compulsory suppliers, preferred suppliers and suppliers with no preference. This will impact on how the suppliers are presented in the Supplier database to the users and in the RA templates how they are pushed at the users.

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# Breadcrumb 4 - Communications Check in Data push page

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Create Risk Assessment(s)

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Rejected RA Archive

Master Admin templates

Ra Timer

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RISKS AND MITIGATION

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SUPPLIER INFO

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COMMUNICATIONS

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CONTINGENCIES

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PREVIEW

Add Communications

Please list all local numbers of team including IMEI if not in traveller profile already

Name

Local Number

IMEI

Name

+1 201-555-5555

IMEI

Please list any local contacts in addition to fixer who can be contacted in case of emergency

Name

Role

Number

Email

+1 201-555-5555

Call In Schedule

NO Of Check In

1 Check In Time

How many times will you check in

1 Check In Time

Point Of Contact

2 Check In Time

Point Of Contact

1 Check In Time

Detail an overdue procedure (how many hours before concern/ is there a telephone cascade system)

Detail an overdue procedure

Do you want to receive a text reminder 15 minutes before your check in time

Do you want your POC to receive a text reminder if you are X hours late with your check in

Want to share this information with traveller

No

Back

Next

This breadcrumb, allows the CSA/RP Staff to push a check in procedure and designated Points of contact to the user. However, for the moment we should leave this page untouched for the trial as we will not push this info during the trial by simply keeping the share button on No.

Long term, when the check in pages of the RA are revamped and the number of check in fields then creates the same number of check in time fields - this page should have the same visual.

As with all of this section, UX needs to improve

# Breadcrumb 5 - Contingencies Datapush

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Online

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CONTINGENCIES

PREVIEW

Add Contingencies

What medical provision/skill is there to treat a casualty at point of injury ?

Medical Provision

Detail method of evacuation to nearest hospital(self drive/ambulance)

Method Of Evacuation

Detail nearest hospital, address, number

Detail Nearest Hospital

Medevac Company

Medevac Company

Specialist kit being taken

☐ Sat Phone/ Number

☐ Tracker/ID

☐ First Aid Kit

☐ Personal Protective Equipment

Want to share this information with traveller

☐

No

Again no need to change this page for trial because like the others we will not push this data to the users during trial by keeping No function on.

However long term (like all the other data push breadcrumbs) when the CSA completes these fields, they should pre-populate the fields in the RA for the user. The user should not have to complete these fields at all if the CSA is completing this data for them.

And there should be a free entry data field for "Any other equipment."

And as with all these breadcrumbs, UX can be improved.

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# Breadcrumb 6 - Preview Page

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Bob Richards  
Online

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Ra details

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CREATE RA

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3  
SUPPLIER INFO

4  
COMMUNICATIONS

5  
CONTINGENCIES

6  
PREVIEW

Preview Of Risk Assessment

RA Detail

Name Of Ra

Earthquake Template

Client Name

Bongo News

CountryThreatMatrix

Classification

Country

Supplier's details

Name

Cost

Cost

Communication

Detail An Overdue Procedure

detail an overdue procedure

Emergency Contact

Email :-

Number :-

Role :-

Country Of Opration

Country Of Opration

Specific Information

specific info

Country

Country

Currency

Currency

The preview breadcrumb seems to be okay

We just need to ensure that every field that is in the RA template appears in the preview even if the user has not filled it out.

Also we will need to check things like spelling as there seem to be a lot.

# Adding a supplier - the fields that need to be worked on for trial

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Bob Richards

Online

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Supplier

Dashboard > Supplier

Add Supplier

Supplier name

Enter supplier name

Country

Select country

City

Enter city

Address

Enter contact address

Mobile number

Enter mobile number

Email

Enter email

Sourced by

Enter Sourced by

Currency

Select currency

Cost

Enter cost per unit/day if known

Description

Enter supplier description

Service provided

Share with

None Selected

Please rate:

☆☆☆☆

Attach any relevant doc(only accept file type .csv/.doc/.txt)

Save Supplier

Can the mobile number/email be used as unique identifiers in the system to avoid duplicate Suppliers.

Users may get spellings of suppliers names wrong.

When entering a duplicate supplier can the DB tell the individual entering the data, that a supplier with the same number already exists

And then ask if they still want to proceed? Or block them from doing so

When adding a new supplier, the service should be a driving feature of the DB and should appear as the first field.

Long term CSA's / RP Staff should have permission to make a supplier compulsory / Preferred or normal. If compulsory they should appear at the top of the supplier list of the relevant country. If preferred they should appear after compulsory suppliers and if normal they will be the last to appear. Within these categories the suppliers with the most amount of stars should appear at the top of the list

See below

Only the CSA / RP Staff should be able to fill these Rating fields and the users and admin should only be able to view them.

A star review system will have to be created as part of the feedback function which the user is emailed after each trip. This will then simply work out an average number of stars per supplier and users should see this.

Reword this to say "Daily rate"

# Breadcrumb 6 - Preview Page

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Bob Richards

Online

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CREATE RA

RISKS AND MITIGATION

SUPPLIER INFO

COMMUNICATIONS

CONTINGENCIES

PREVIEW

Preview Of Risk Assessment

RA Detail

Name Of Ra

Earthquake Template

Client Name

Bongo News

CountryThreatMatrix

Classification

Country

Supplier's details

Name

Name

Cost

Cost

Communication

Detail An Overdue Procedure

detail an overdue procedure

Emergency Contact

Email :-

Number :-

Role :-

Country Of Opration

Country Of Opration

Specific Information

specific info

Country

Country

Currency

Currency

The preview breadcrumb seems to be okay

We just need to ensure that every field that is in the RA template appears in the preview even if the user has not filled it out.

Also we will need to check things like spelling as there seem to be a lot.