Incident Management System

Incident Module comprises of 3 roles: -

1.Employee View

2. Supervisor View

3. Health and Safety

1. Applications under Employee View:
   1.1 Report Incident
   1.2 Incident Portal

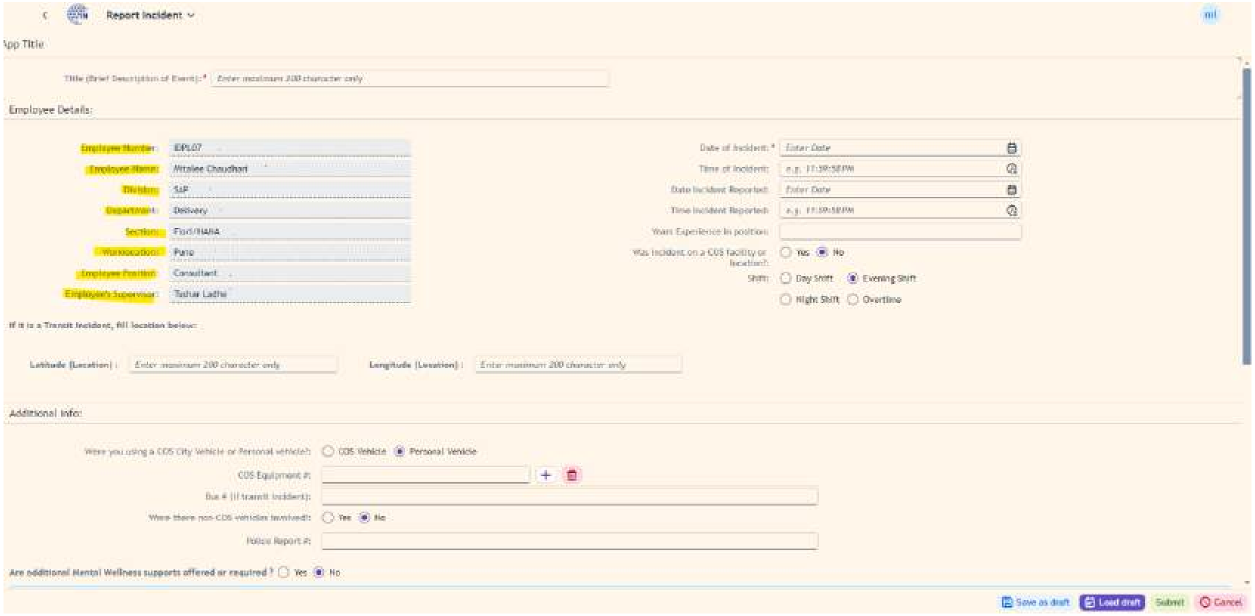
2. Applications under Supervisor View:
   2.1 Incident Portal

3. Applications under Health and Safety View:
   3.1 Incident Portal

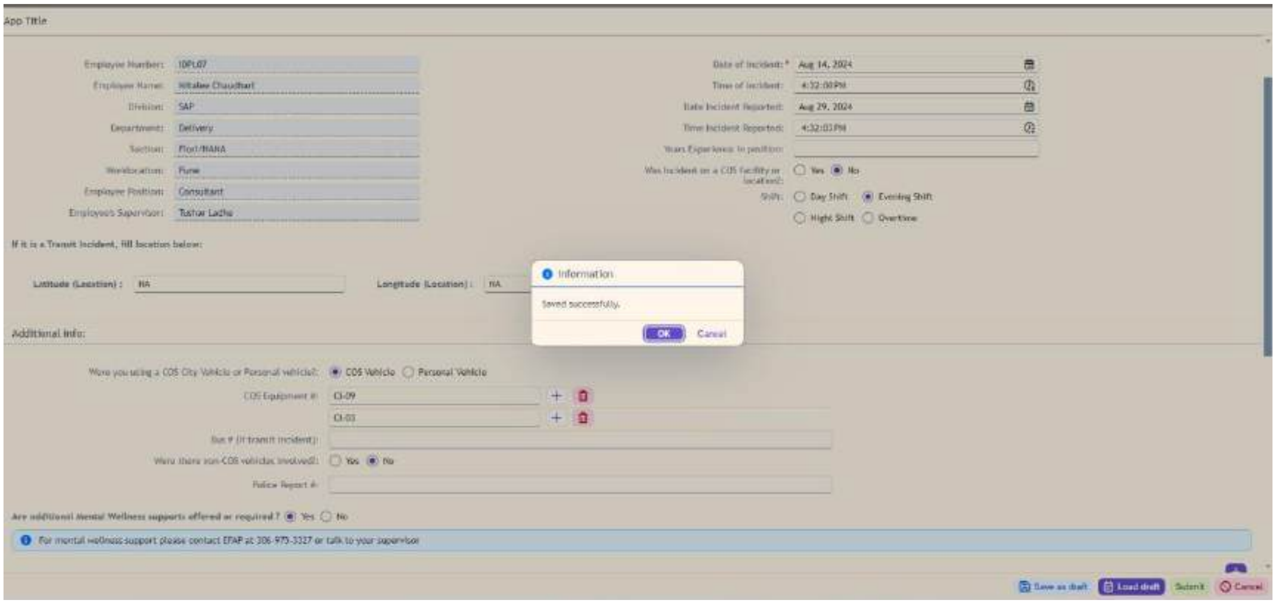
Lets discover Employee View along with applications and functionalities: -

1.1 Report Incident

Once you entered into report incident application, you will able to see your personal details under **employee details** section which you cannot change (read only).

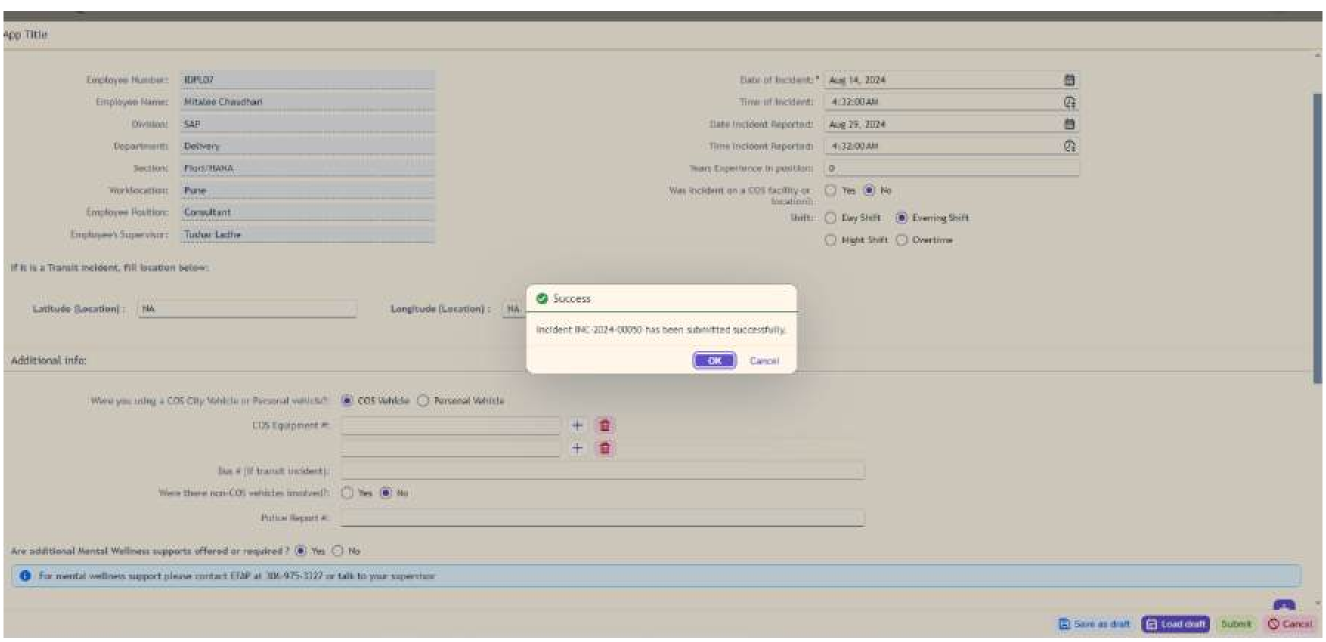


Now fill the complete form. If you are not sure about filled details you can save the form as draft by clicking on save as draft. This will save your form which you can open in future and edit and submit. Now if you hit save as draft button it will show a pop-up saying saved successfully as below.



In future if you want to submit the form, you can open it by clicking on load as draft button and it will give you list of all saved draft like below-

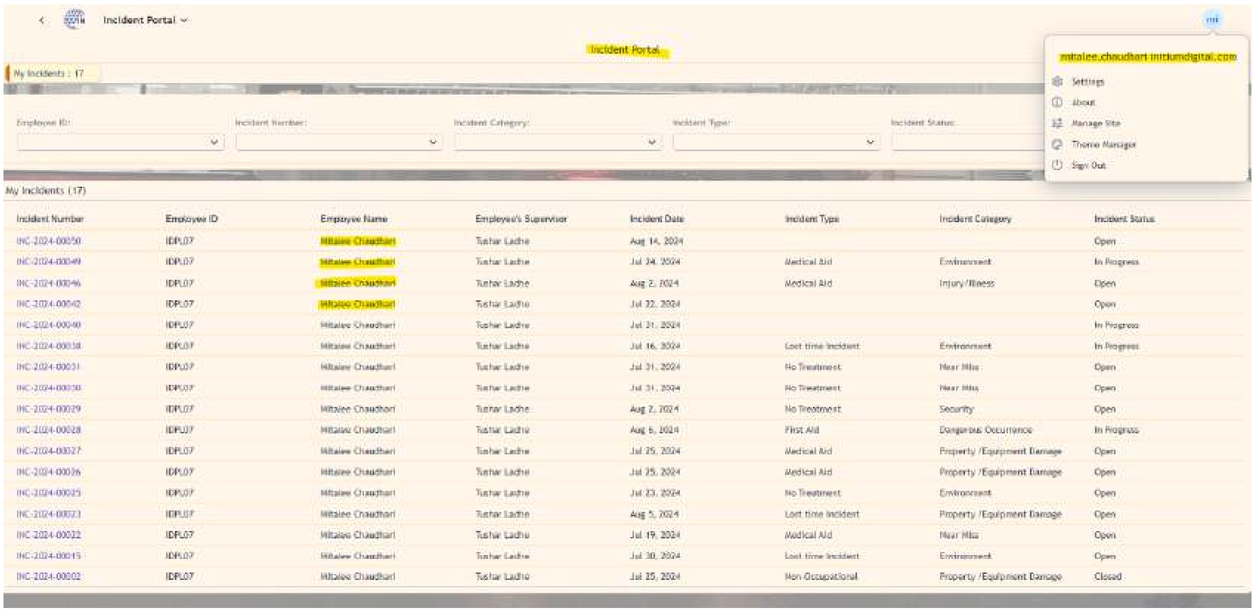
Now select the required incident from the list and do the necessary changes in form and hit submit. Once you hit submit it will generate a Incident number for submitted incident as follows:



You can cancel the request by clicking on the cancel button.

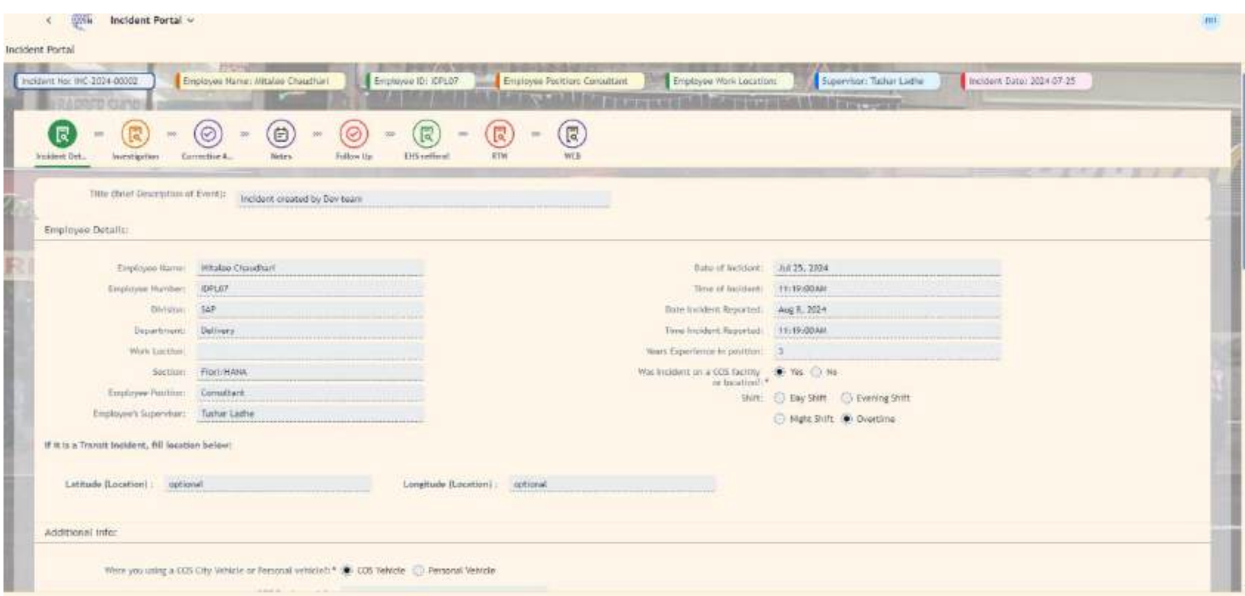
1.2 Incident Portal

Once you submit your incident, you will now able to see submitted incident in incident portal. As you open incident portal, you will able to see list of incidents submitted by **you only** as shown below-



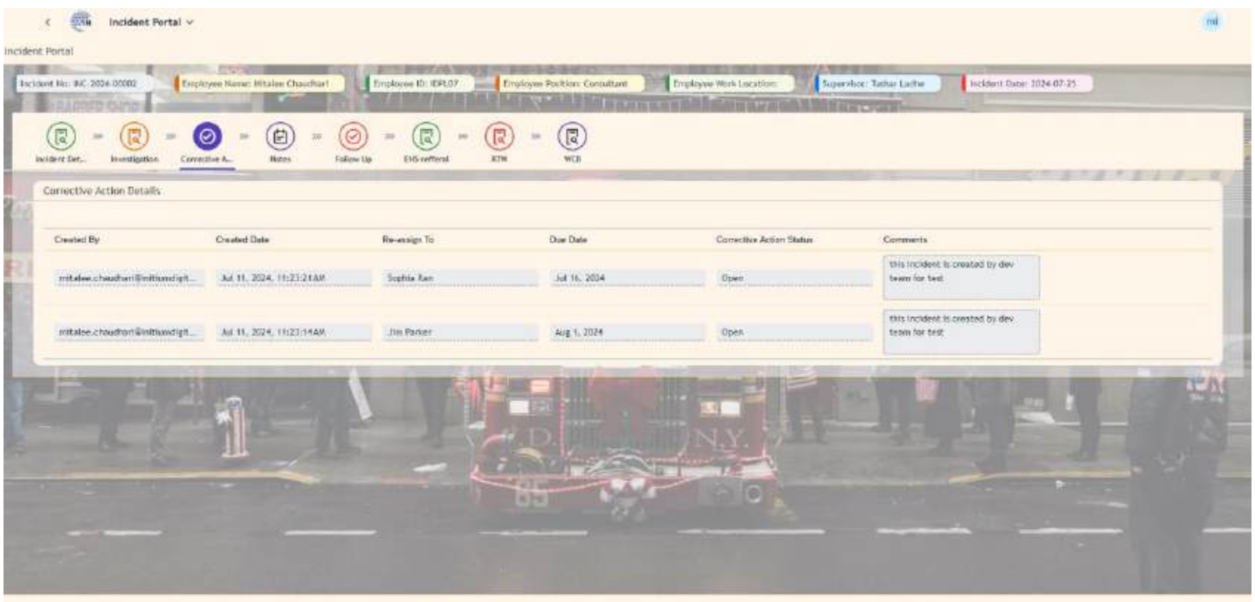
As you navigate inside from incident number, you are being employee will not be able to change anything but you can view the status and details and other information filled by supervisor and H&S team as shown below-

Incident details Tab



Investigation Tab

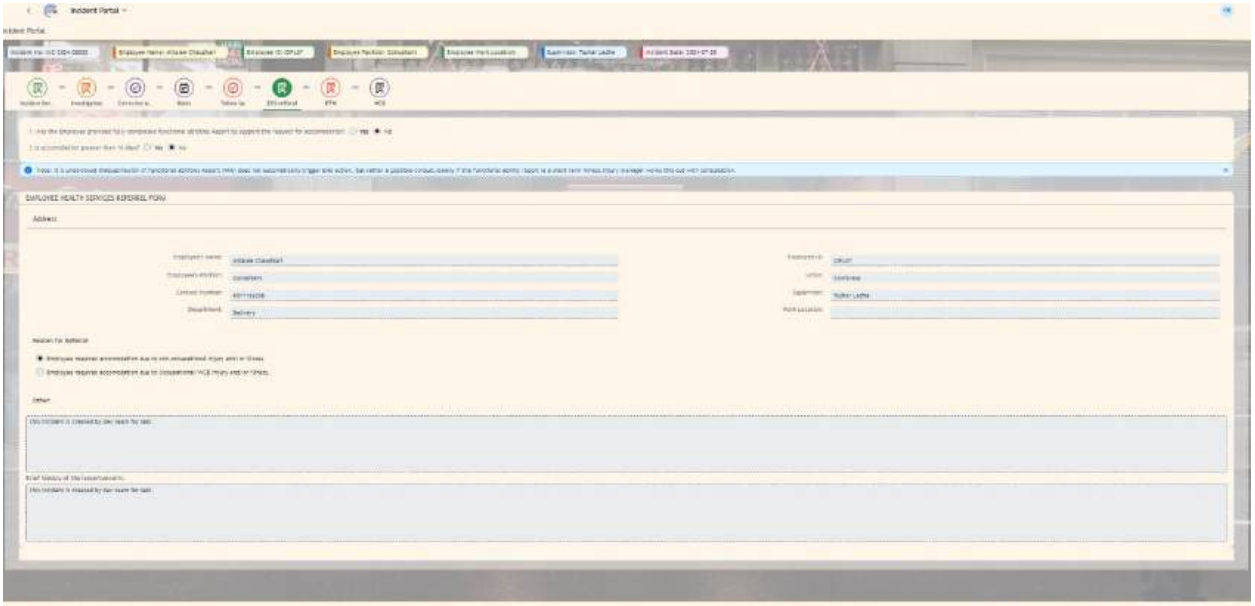
Corrective Action Tab



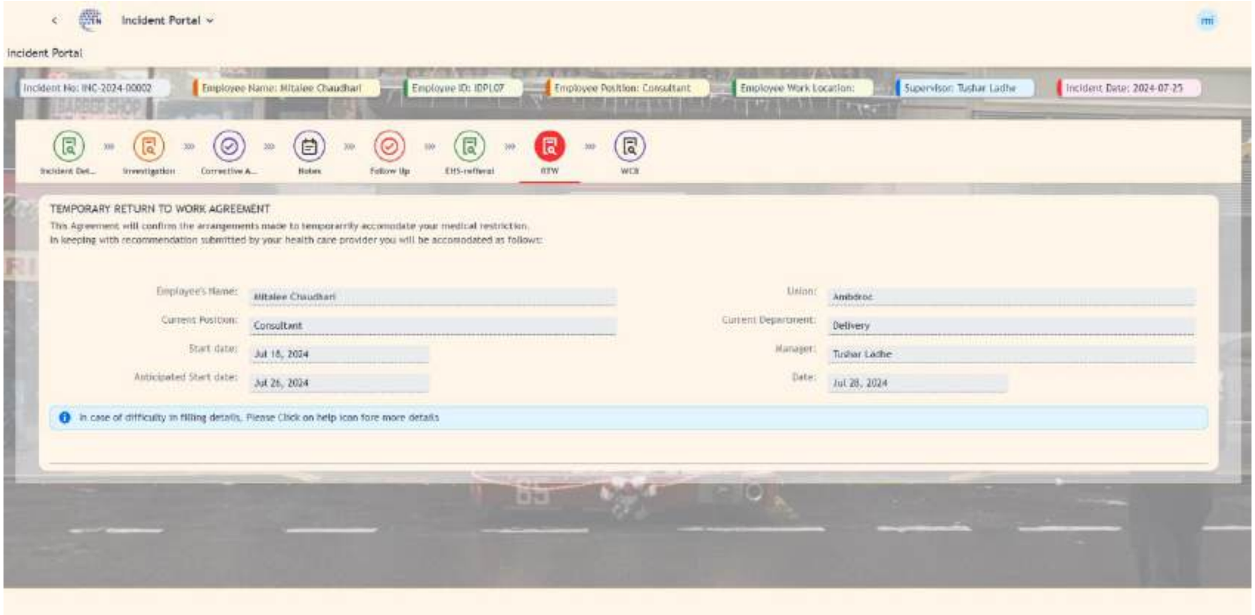
Notes Tab

Follow up tab

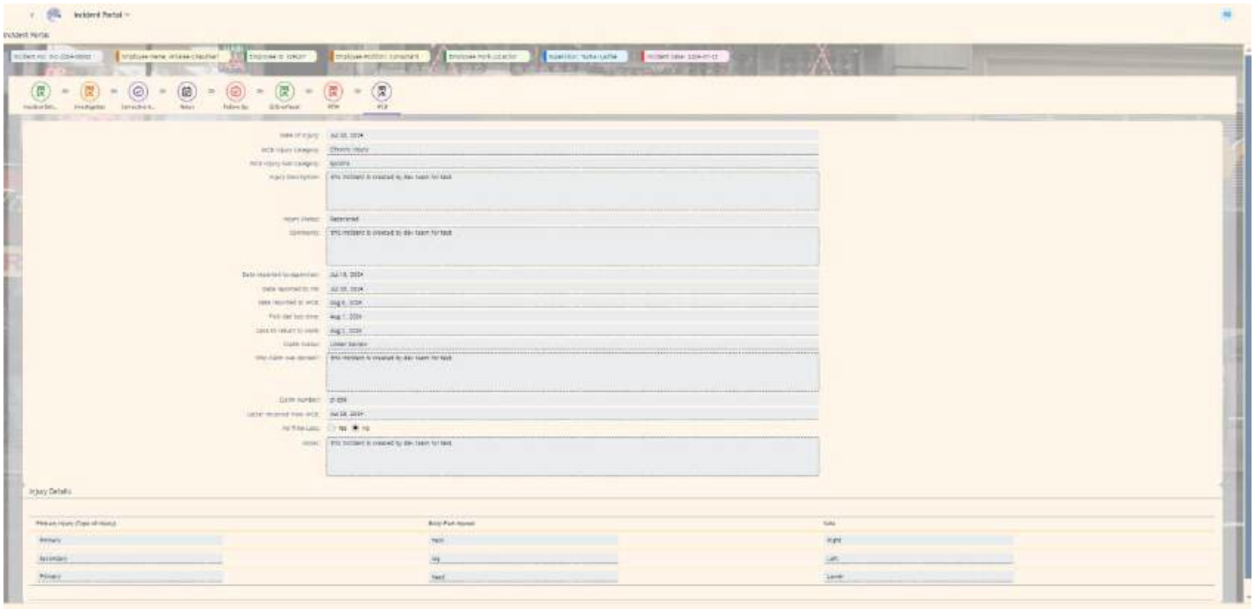
EHS Referral Tab



RTW Tab



WCB Form Tab



Lets move to the next View

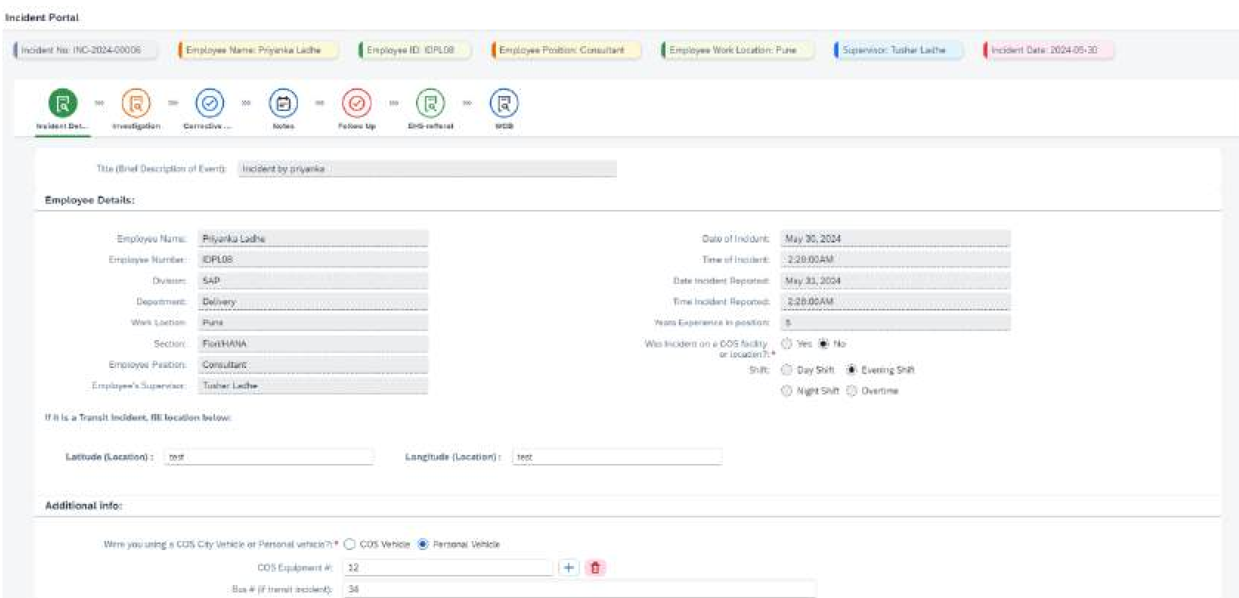
Supervisor View

Your submitted incident is now accessed by supervisor in supervisor view under Incident Portal application. It shows the total number of incidents at top of page as My Incidents. It also includes a filter bar which helps you to filter out the data on various parameters when number of incidents will increase. You just simply have to select the required value for filter. For e.g. if you have to search all the incidents created by employee with employee ID say IDPL08. You have to click on Employee ID filter, this will give a list of all employee ID's. Then select the employee ID and click on the Go button. It will give you list of incidents with employee ID as IDPL08. If you want to remove filter, click on clear button and filter will be removed.

Incident Number	Employee ID	Employee Name	Employee's Supervisor	Incident Date	Incident Type	Incident Category	Incident Status
INC-2024-00050	IDPL07	Mitalee Chaudhari	Tushar Ladhe	Aug 14, 2024			Open
INC-2024-00049	IDPL07	Mitalee Chaudhari	Tushar Ladhe	Jul 24, 2024	Medical Aid	Environment	In Progress
INC-2024-00047	IDPL01	Sagar Patil	Tushar Ladhe	Jul 21, 2024	Medical Aid	Dangerous Occurrence	In Progress
INC-2024-00046	IDPL07	Mitalee Chaudhari	Tushar Ladhe	Aug 2, 2024	Medical Aid	Injury/Illness	Open
INC-2024-00045	IDPL08	Priyanka Ladhe	Tushar Ladhe	Jul 11, 2024	Non-Occupational	Property /Equipment Damage	Open
INC-2024-00042	IDPL07	Mitalee Chaudhari	Tushar Ladhe	Jul 22, 2024			Open
INC-2024-00040	IDPL07	Mitalee Chaudhari	Tushar Ladhe	Jul 31, 2024			In Progress
INC-2024-00038	IDPL07	Mitalee Chaudhari	Tushar Ladhe	Jul 16, 2024	Lost time Incident	Environment	In Progress

You can navigate into the system by clicking on Incident Number. After Navigating, system will look like below:

It will open with 7 tabs.

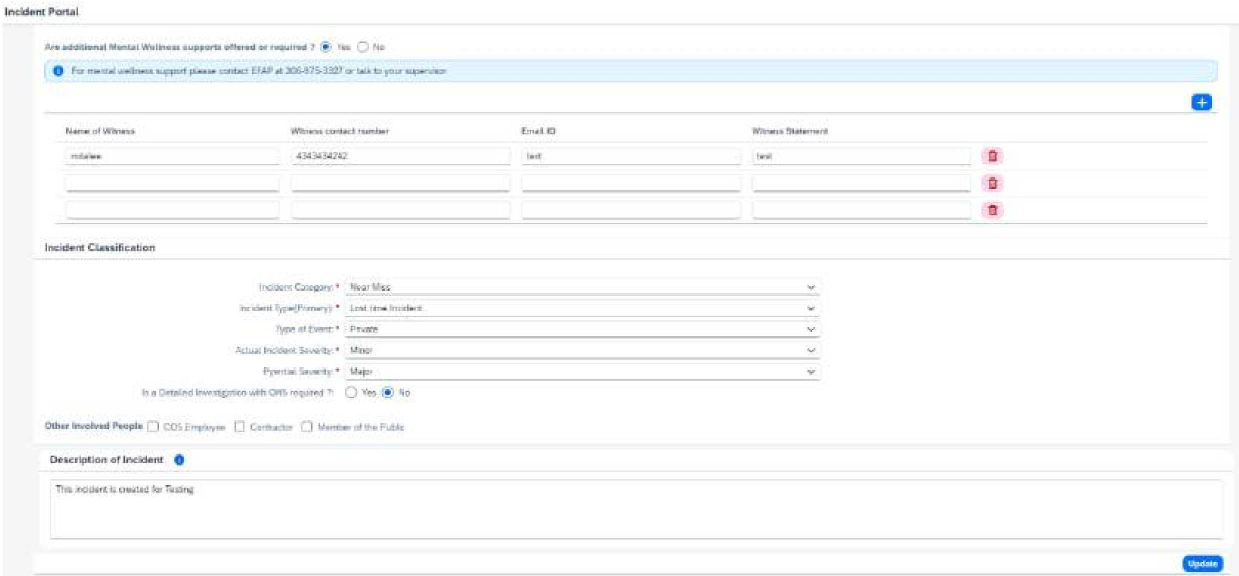


We are on the Incident Details Tab. Whatever details we had filled in the form during reporting incident, will appear in this tab. You as Supervisor cannot make few changes in system e.g. Employee name, Employee Number, Date of Incident etc. hence these fields are read only.

But if you want to Update/Insert rest of fields of this form, you can do this update from this tab.

For e.g.

Say if you want to add more witness to this incident, you can click on add (+) button and more empty rows will be added in the form.



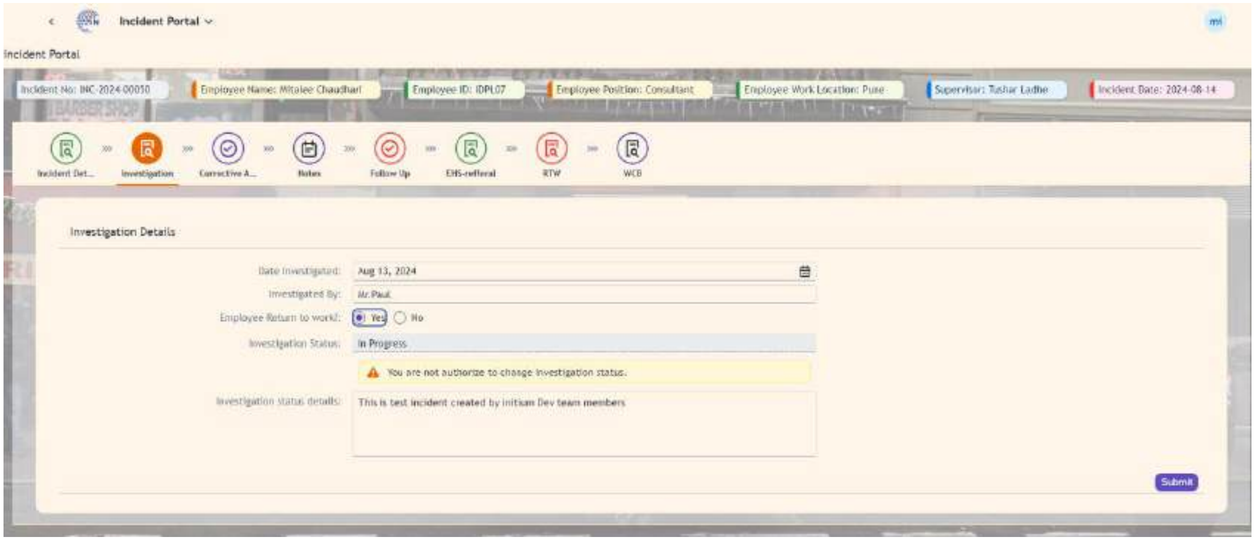
You will need to click on the Update button in order to update your changes into the system.

Once you click on Update button, it will give you success message saying your updates for respective incident are done.

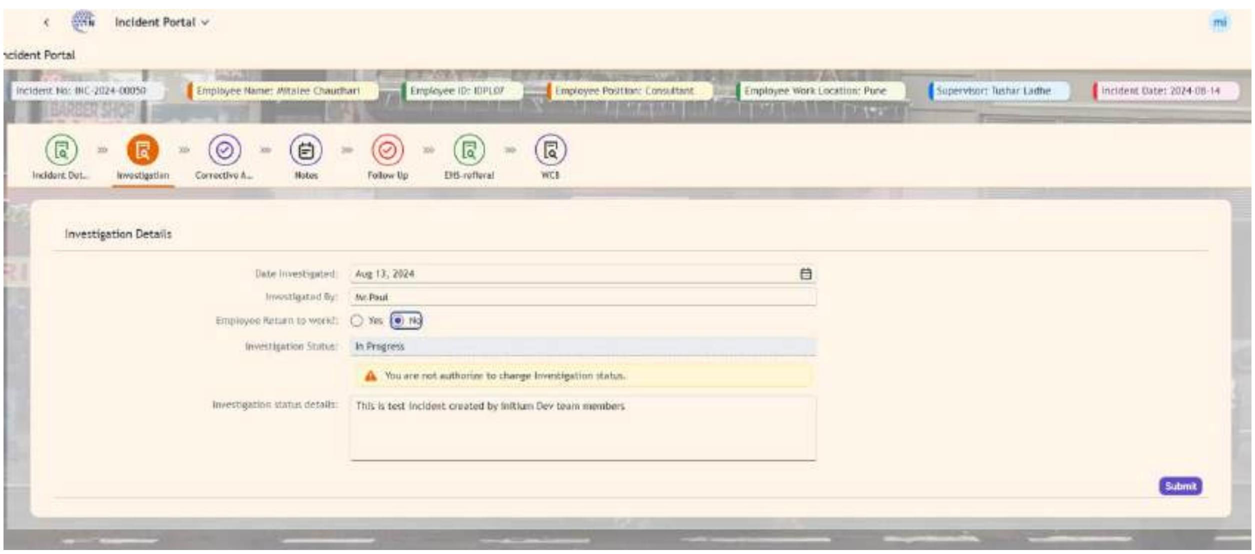
Investigation Tab

In this tab you have to fill details related to investigation which was conducted to investigate respective incident. Initially investigation status will be in progress. Only H&S Team ha authority to mark investigation as Complete.

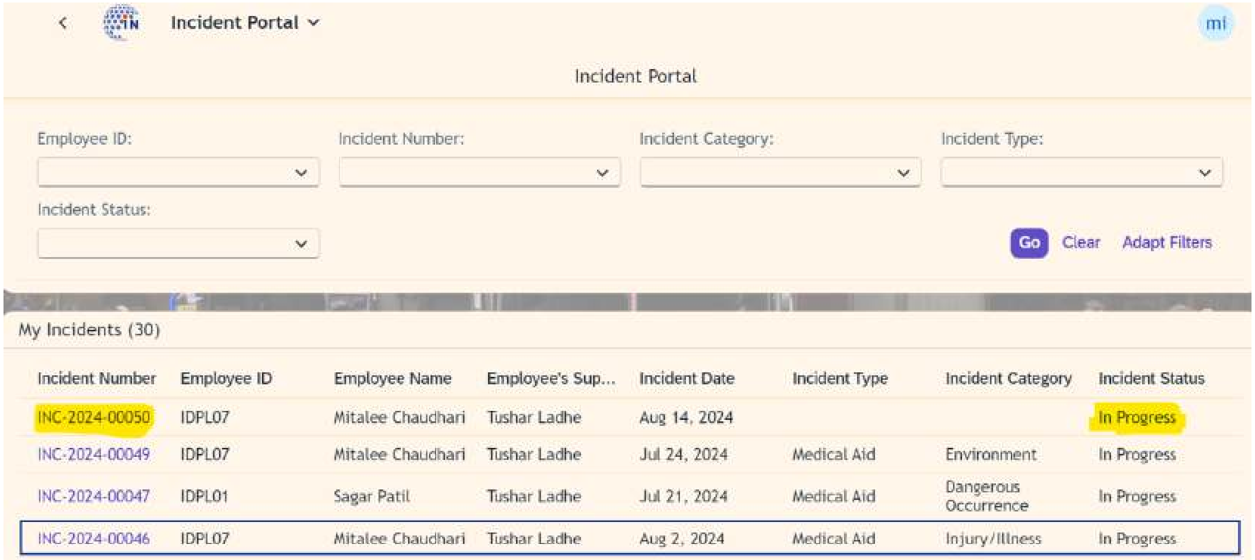
In this tab, fill your investigation details as per requirements, Now here- If you select Employee Return to work? As 'Yes' then only RTW tab will be visible.



else if you select it as ‘No’ then RTW tab will be hidden.



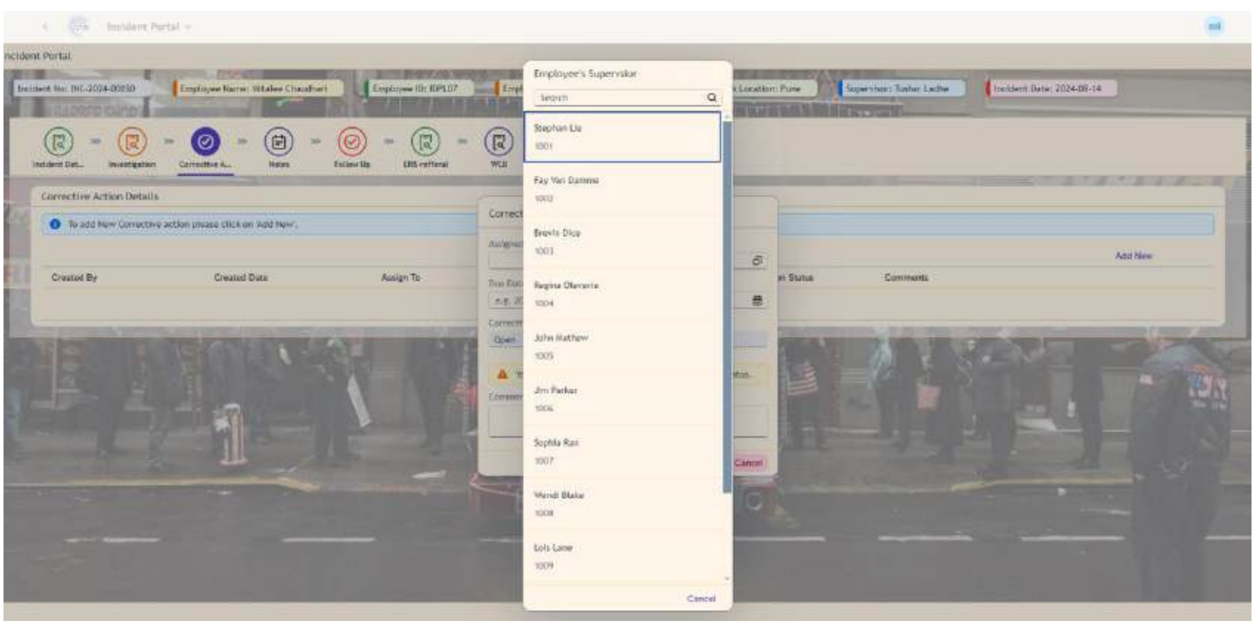
You will have to click on the Submit button to confirm your changes. Once you submit your investigation, your Incident status will change to ‘In progress’ as below:



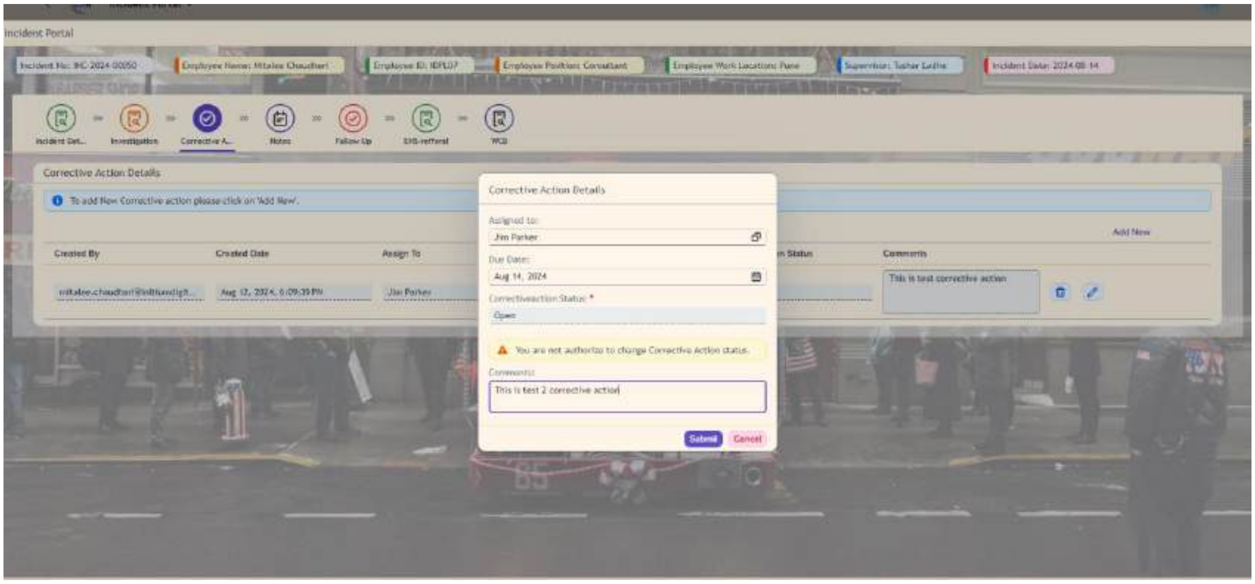
Let’s move to the next Tab,

Now to add **Corrective Action** for an Incident, you must click on Add New button. Once you add Corrective Action, a fragment of Corrective Action details will open where you have to fill details as per requirements.

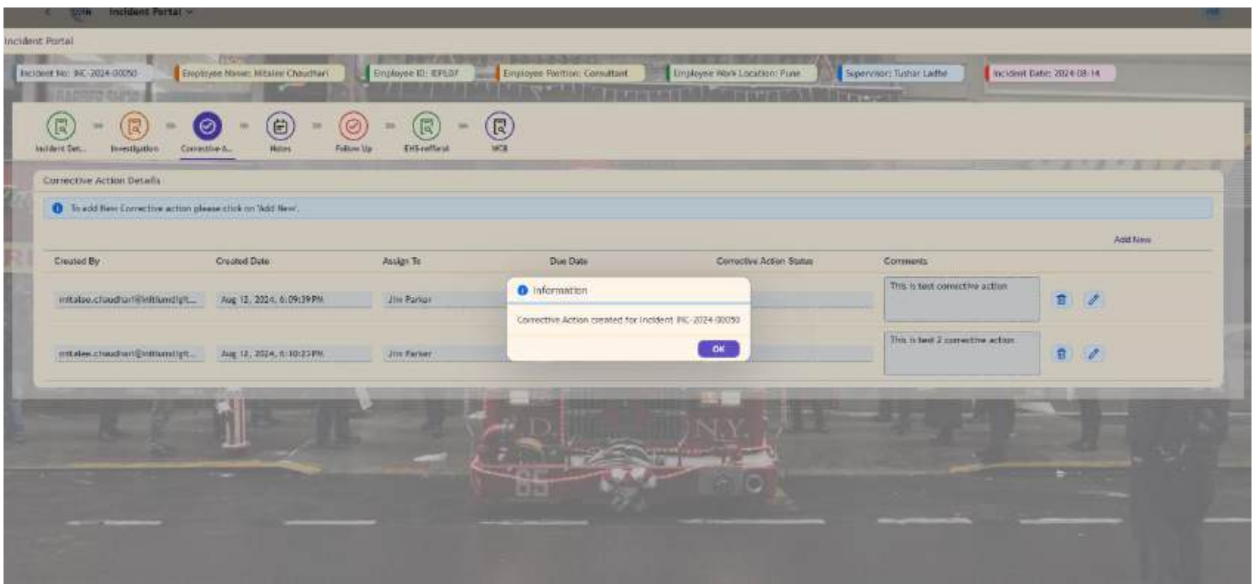
To assign this Corrective action to respective person, you have to click on value help and a list will appear on screen, then select the person from the list to whom you have to assign else to go back click on cancel.



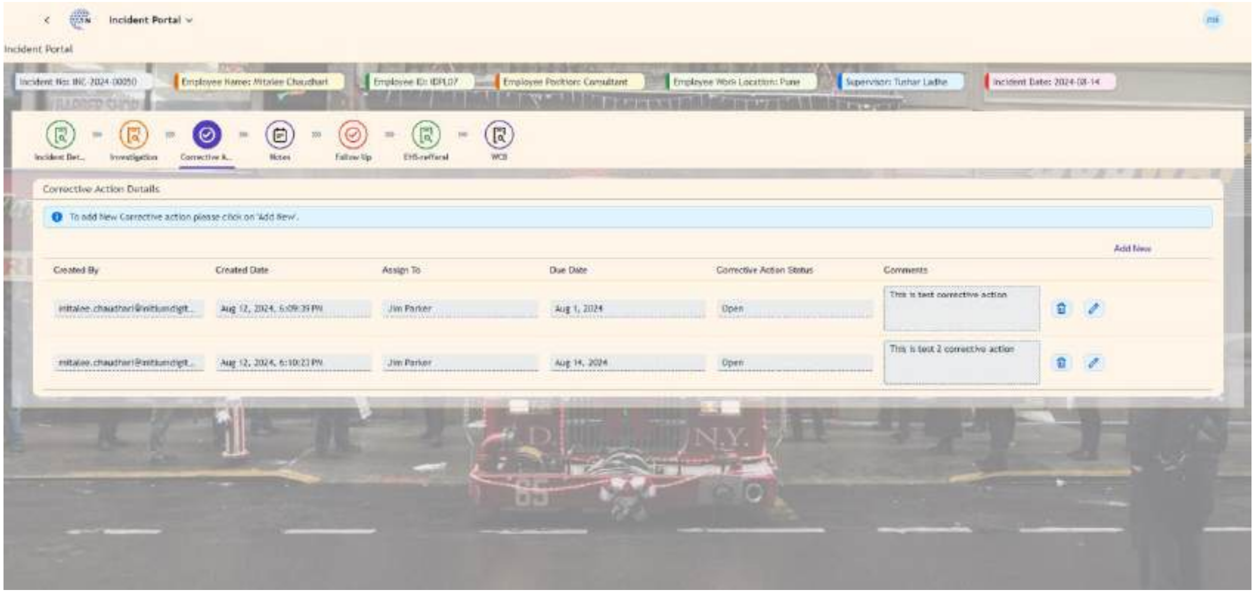
Fill other details in the form. you must click on Submit to confirm your changes.



Once you click on submit, Corrective action will be created for respective incident.



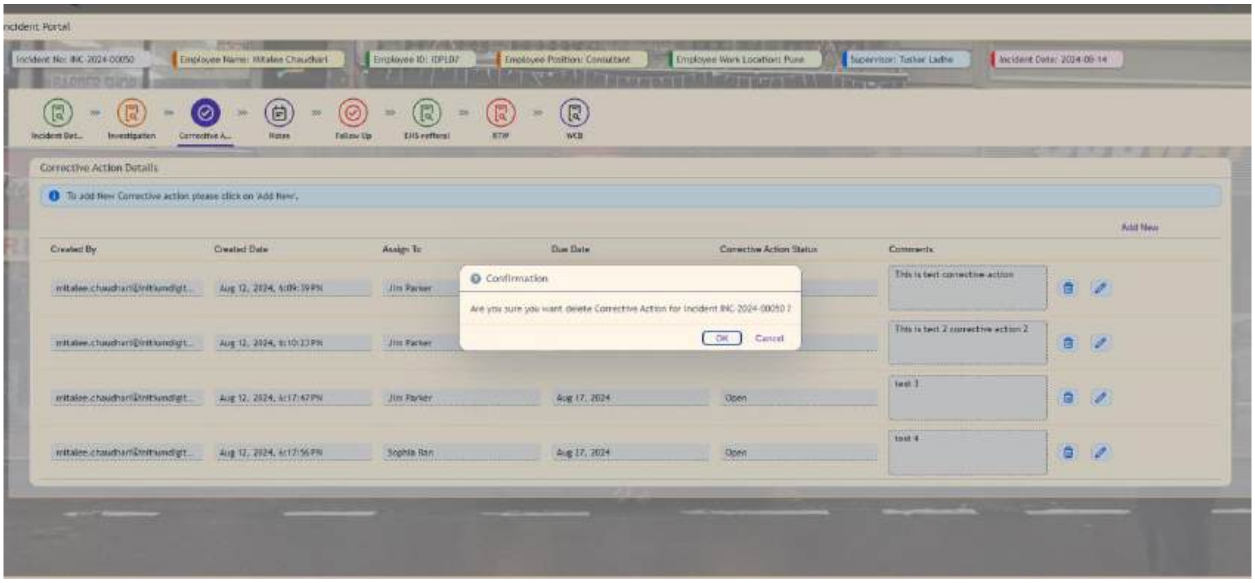
Once you submit your Corrective Action, you can see details on this tab.



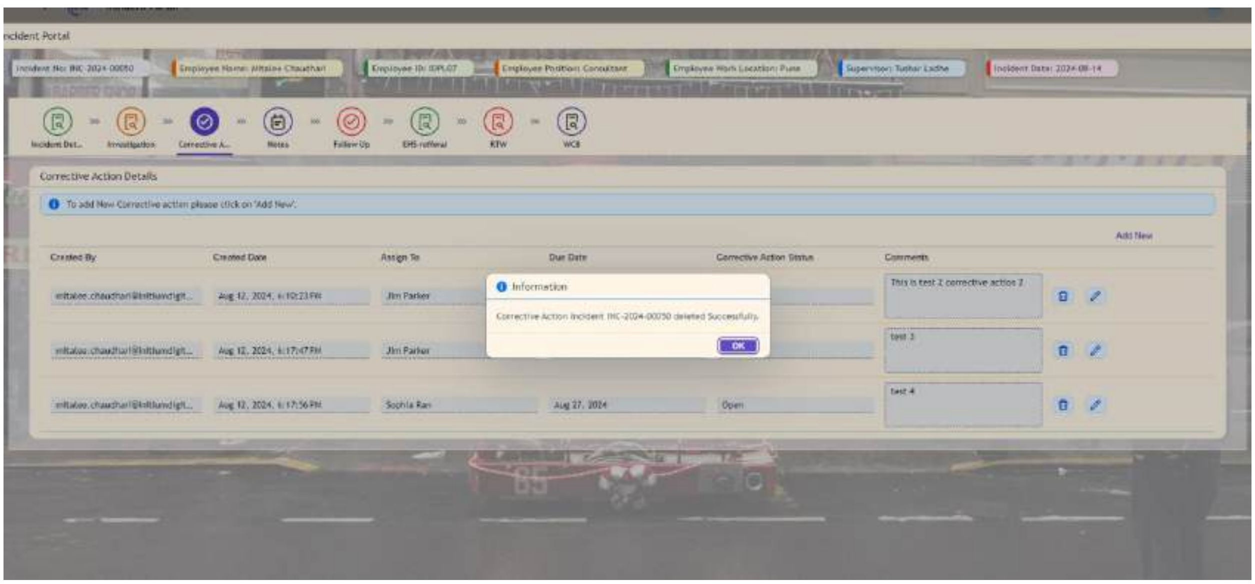
If you want to add new Corrective Action, you will have to follow all these steps again.

Multiple corrective actions will look like below -

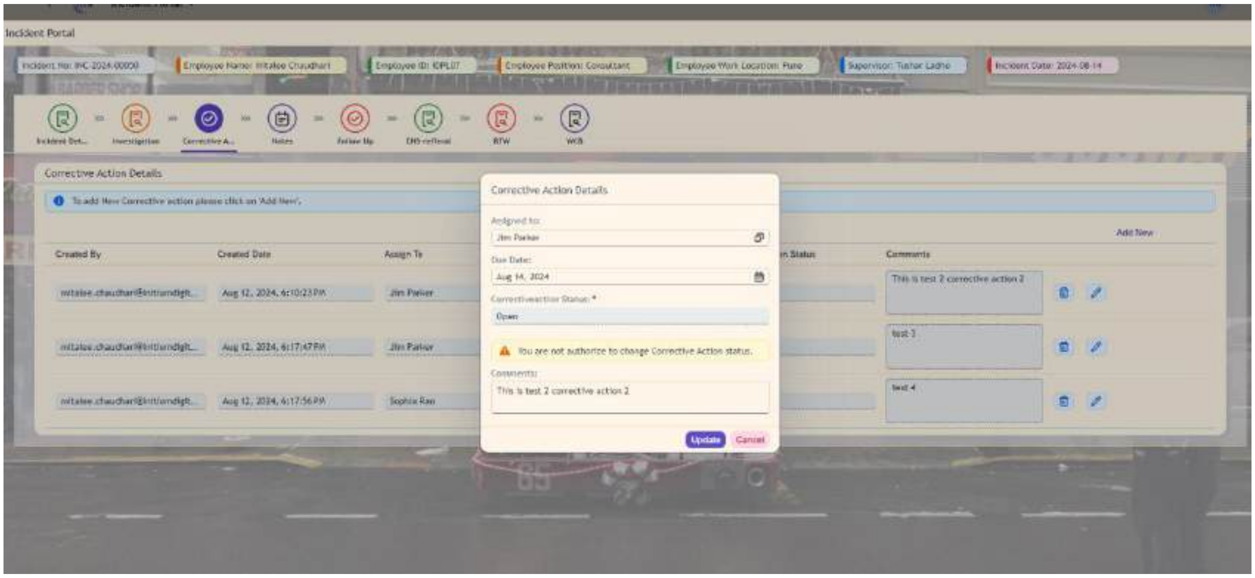
Now if you want to delete any Corrective Action, you will have to click on delete Icon. Once you click on the delete icon, a pop up will appear.



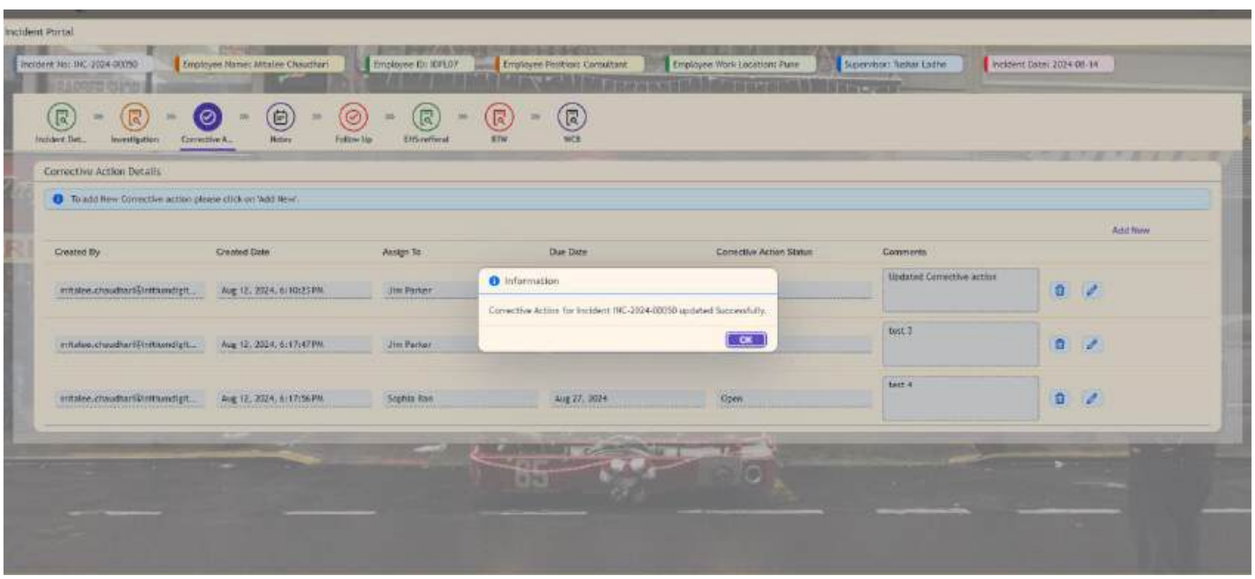
Now if you select OK then your selected Corrective action will be deleted.



Now if you want to edit any of the Corrective action, click on edit button.

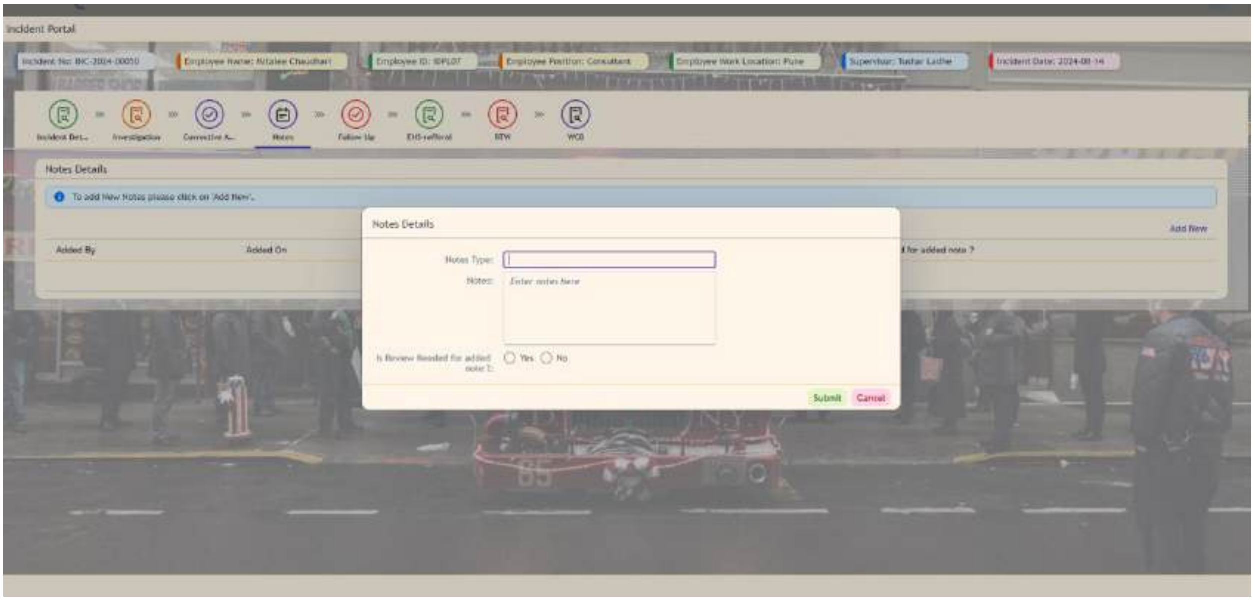


Once you click on edit button, Corrective action fragment will open and you can do whatever changes you want to do. Then click on Update button and your Corrective action changes will be updated.

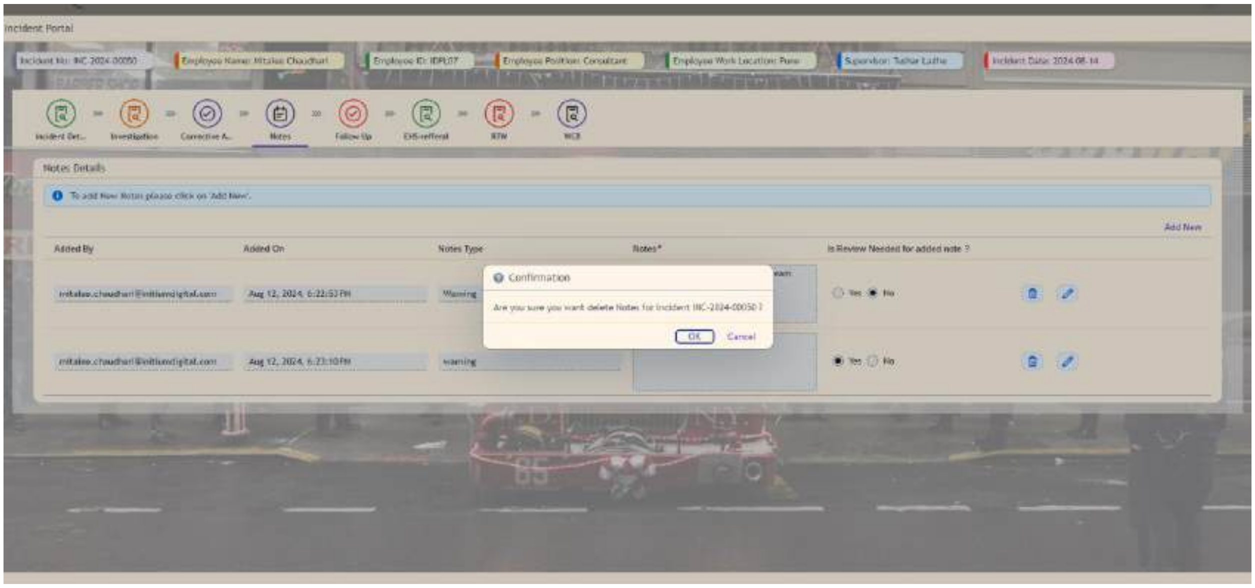


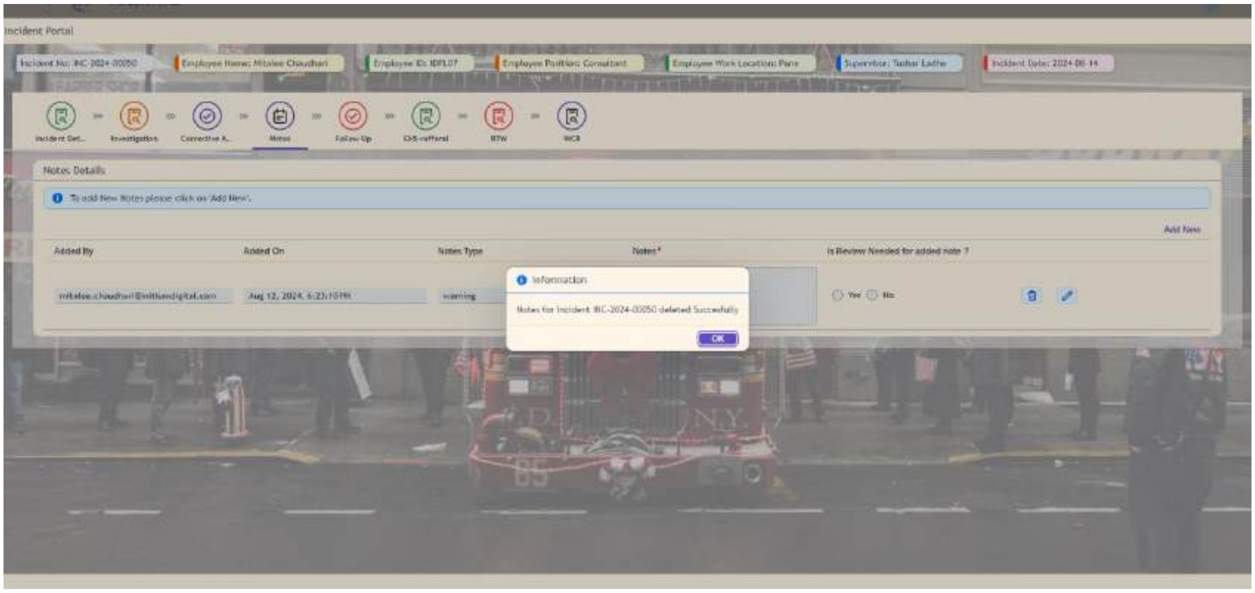
Let's move to next tab: **Notes tab** have same functionality as Corrective action tab where you can add notes, delete notes and edit notes.

Add New Note: Click on Add New Button-

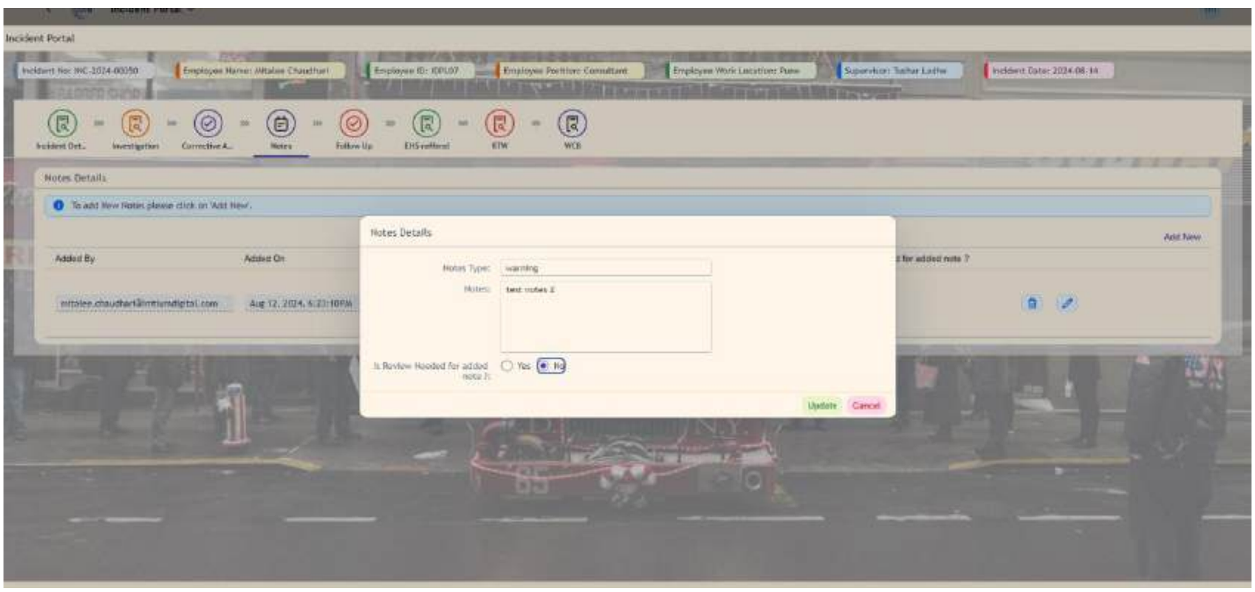


Delete Note: Click on Delete icon



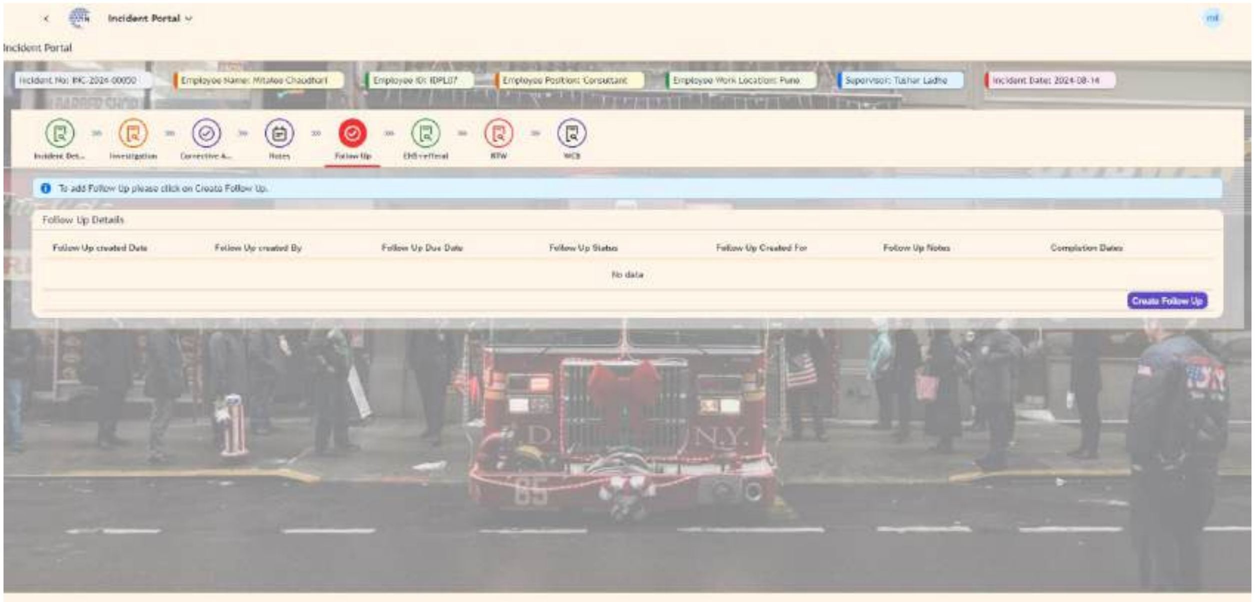


Edit Note: Click on Edit button-

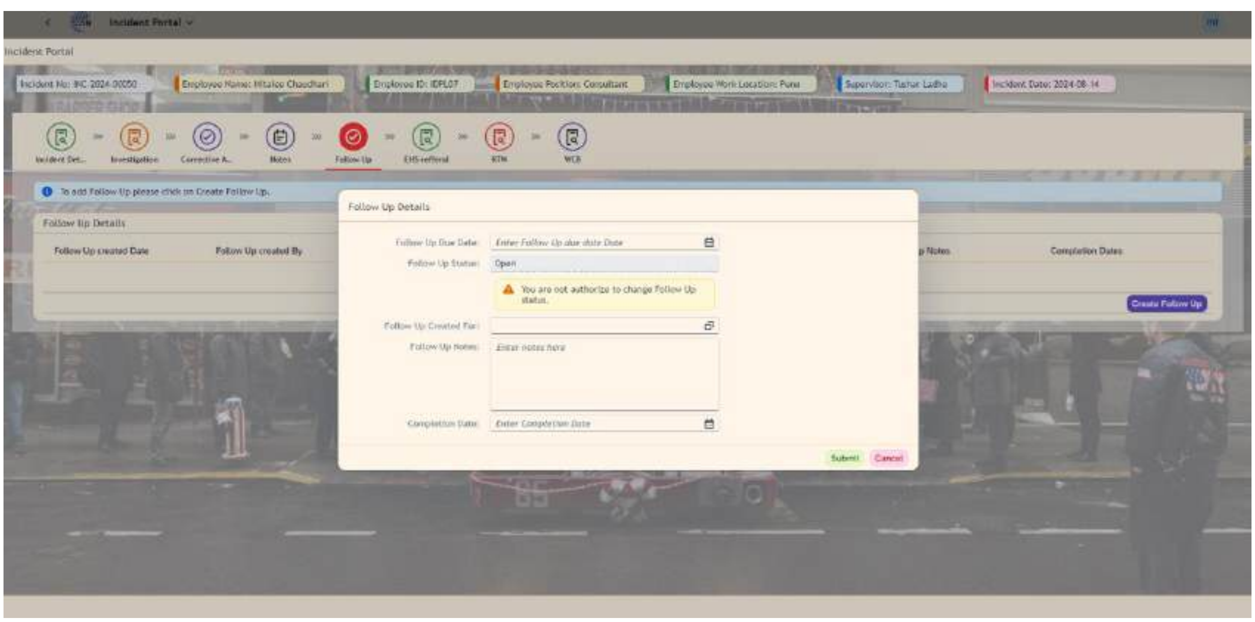


Let’s move to the next tab**: Follow Up**

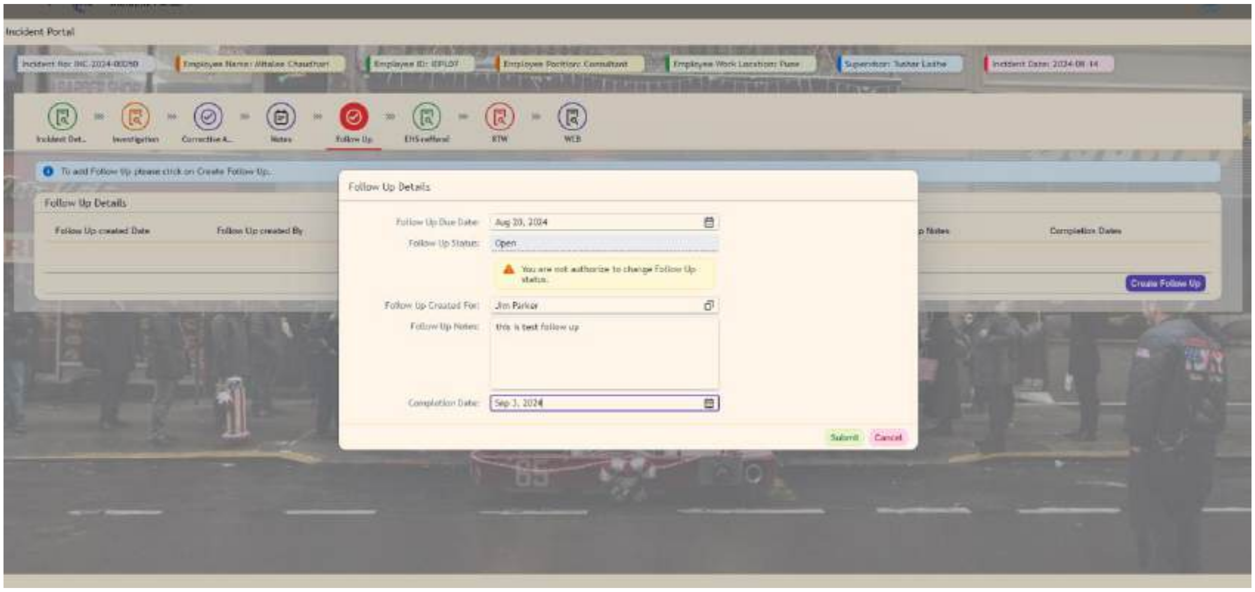
You must have to click on Create follow up button to create a follow up-

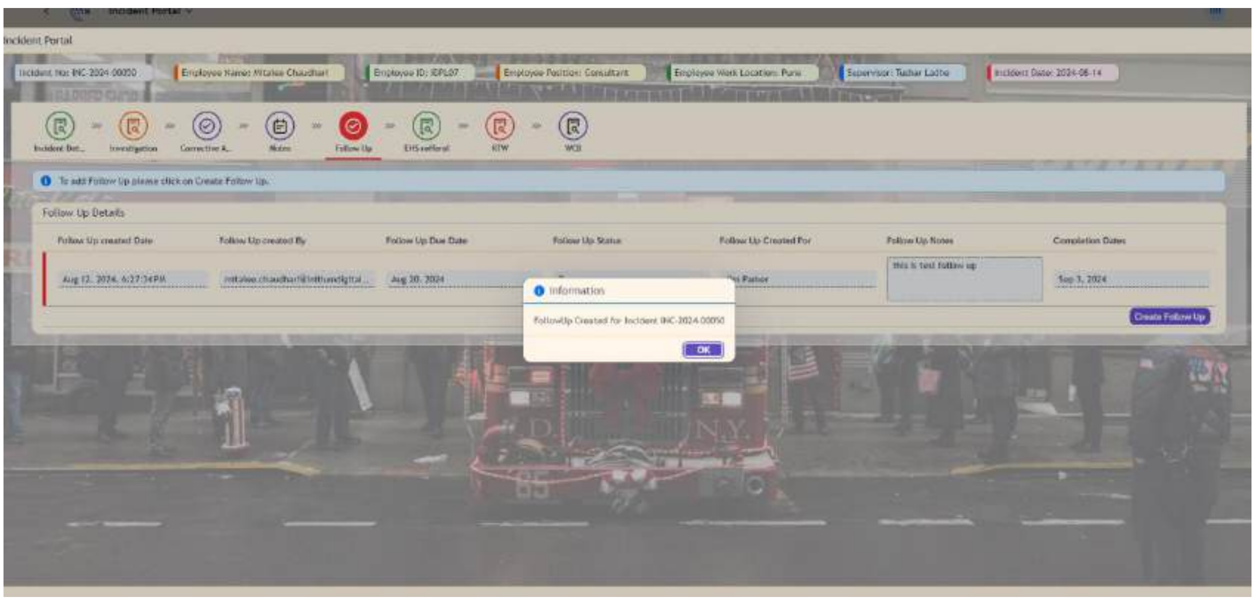


Once you click on Create follow Up Button, fragment will open where you will have to fill in follow up details-

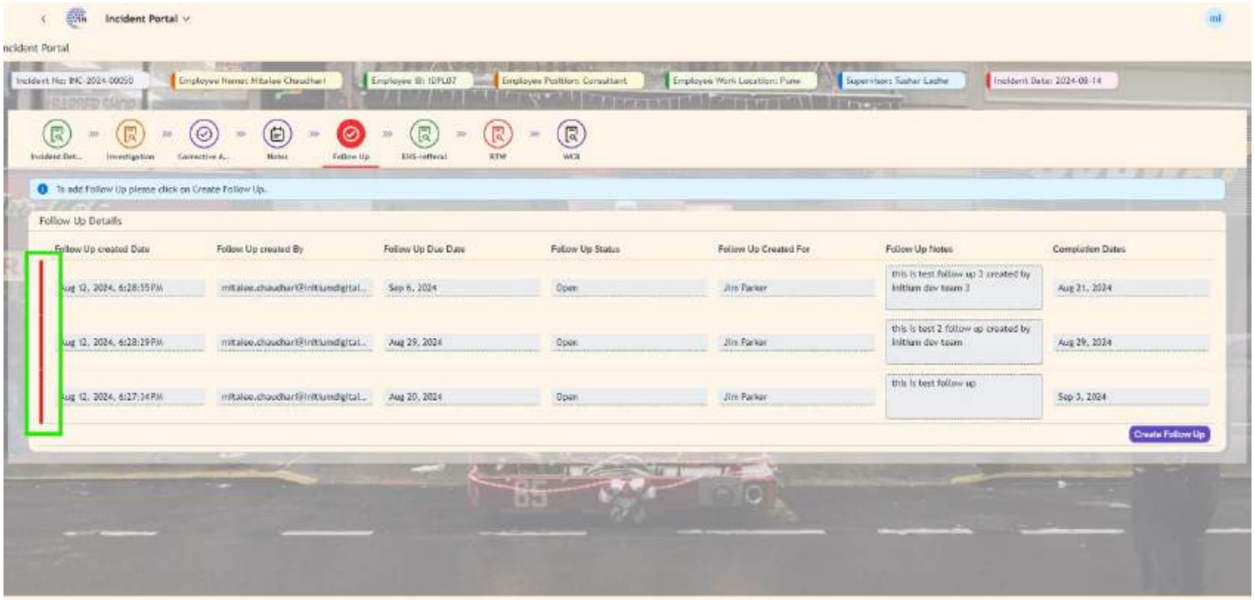


Once you fill your follow details you will have to click on submit





You can create multiple follow up by the same process

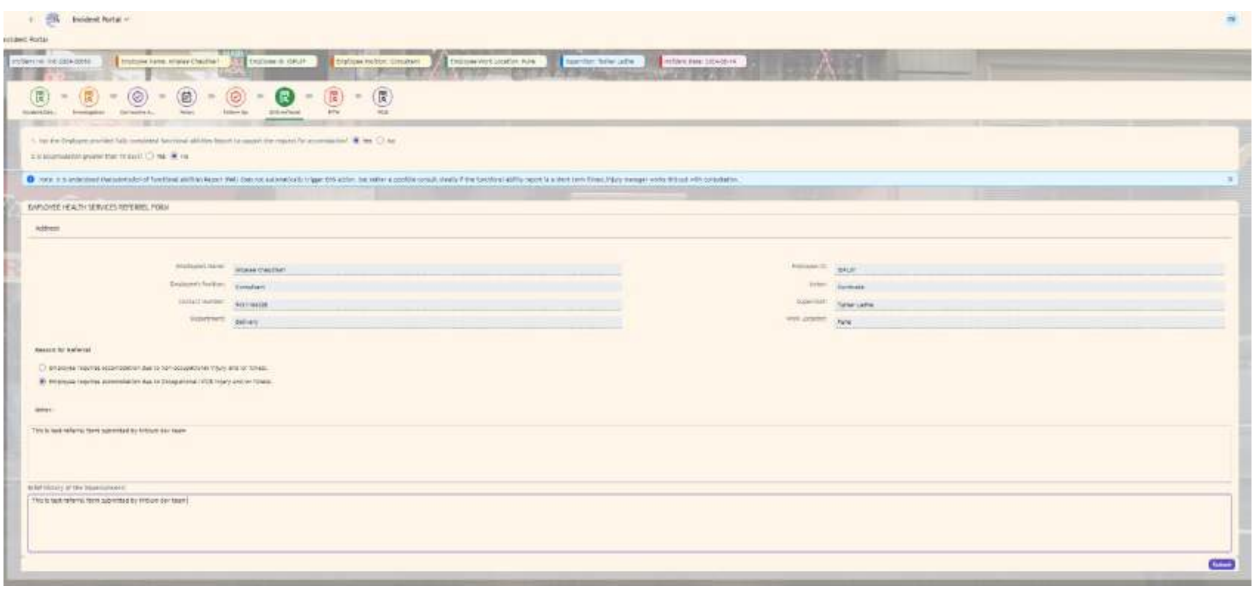


This red highlighted row indicates that follow up is in Open state, once it is completed it will be indicated as green.

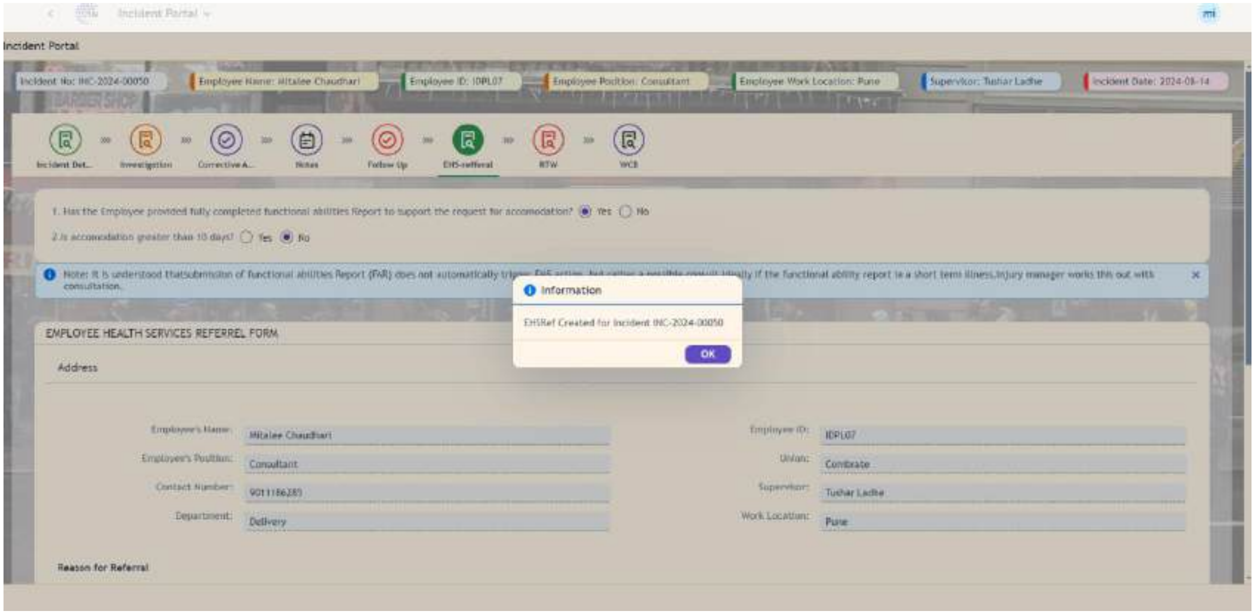
(Manager is not authorized to change Follow up status. Only H&S team can change follow up status.)

Let's move to the next tab: **EHS-Referral**

This tab contains a simple form where you cannot edit few details so the are kept as read only. For e.g. Employee Name, Employee ID, Union etc.



Once you click on submit, your details will be saved.



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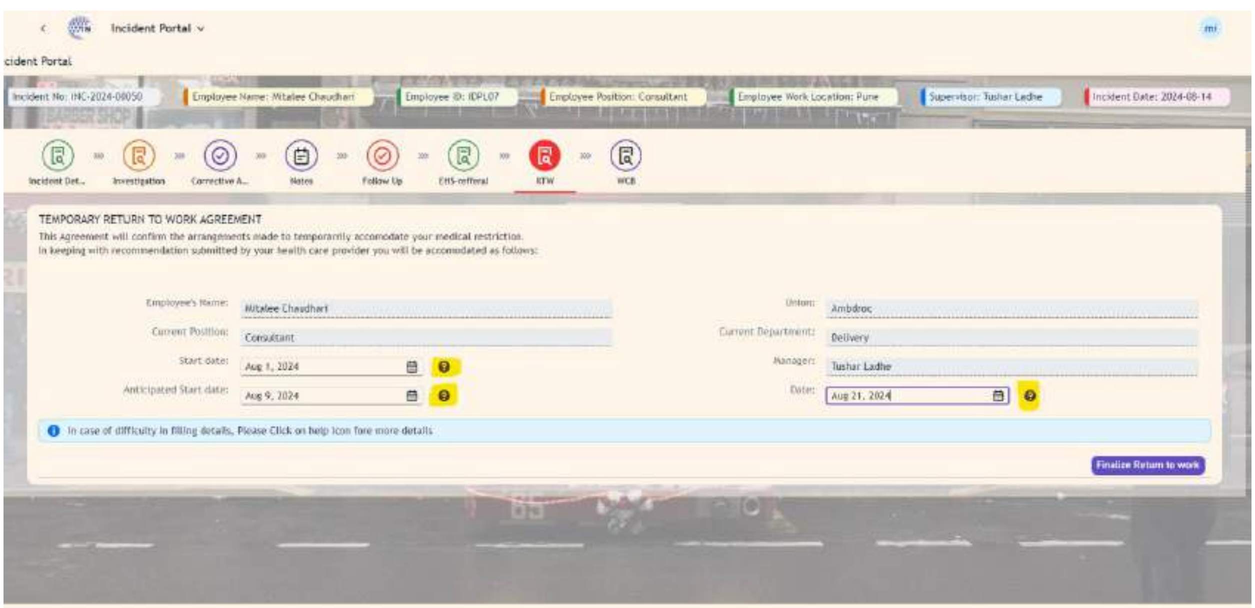
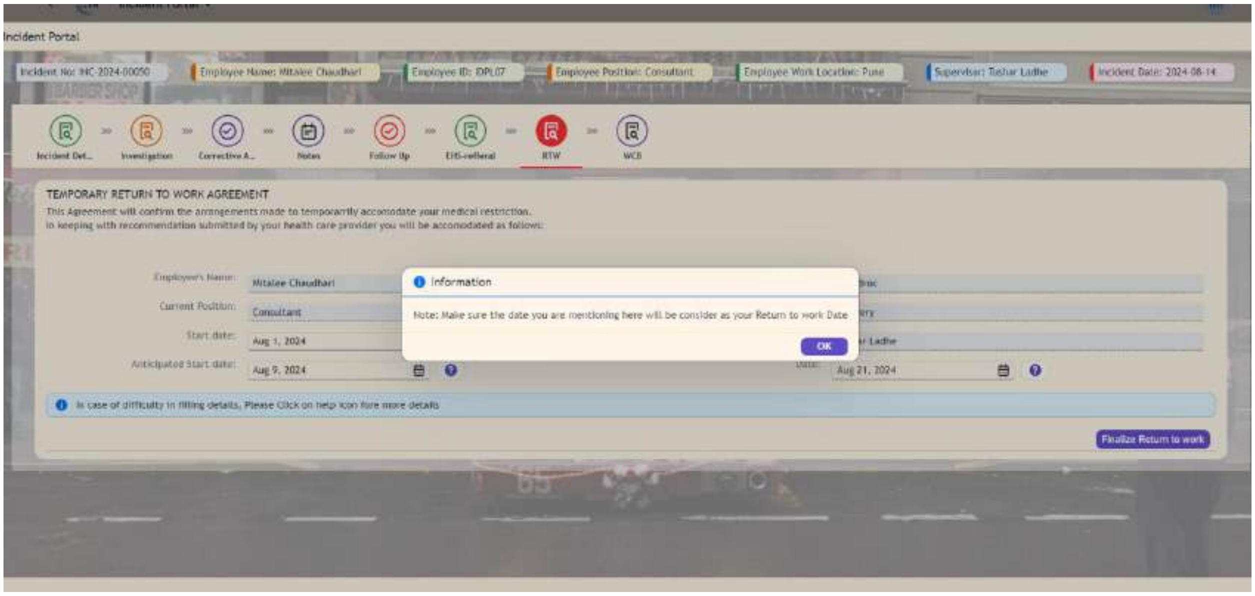
Let's move to next tab: **RTW**

Note that this tab is visible only if you have selected Employee Return to work as Yes in Investigation Tab.

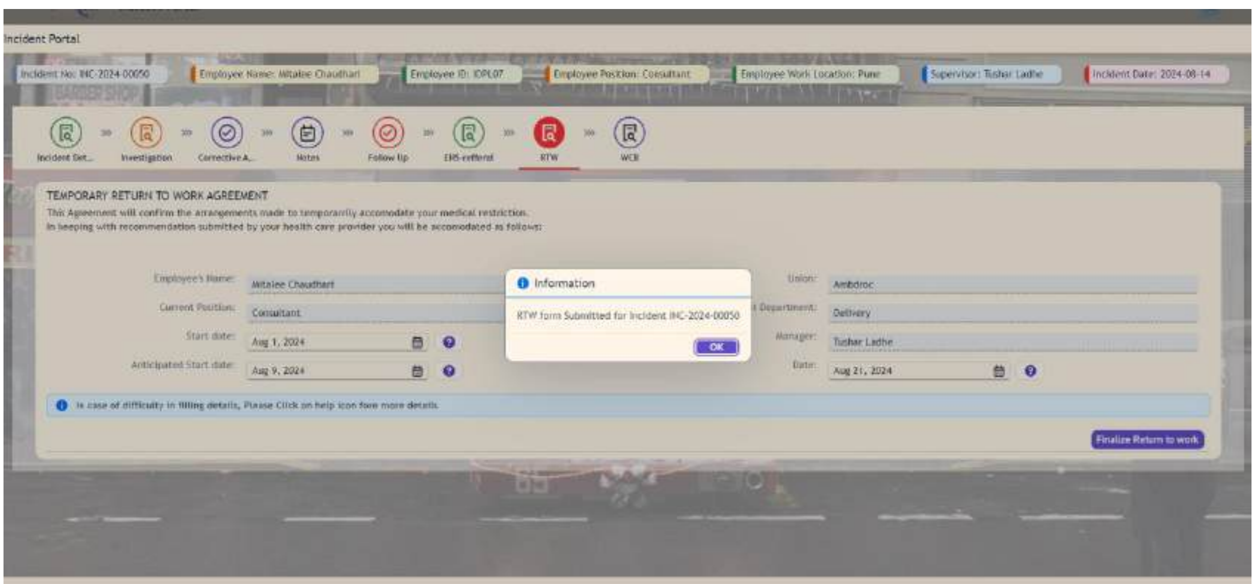


This is also a simple form where in case of any confusion regarding what date refers to what, you can simply click on help icon in from of every date field.

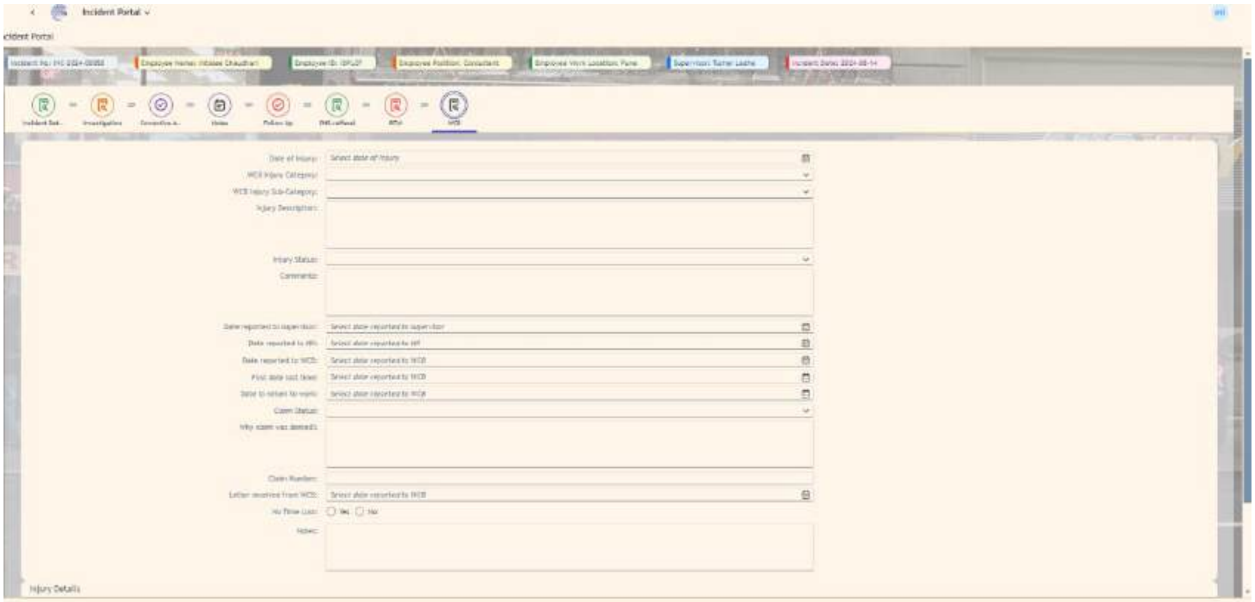
This will guide you to fill the form. For e.g. if you click on help icon in from of start date then a pop up will open helping you, shown as below-



Once you fill in your form, click on finalize Return to Work button and your changes will be saved.

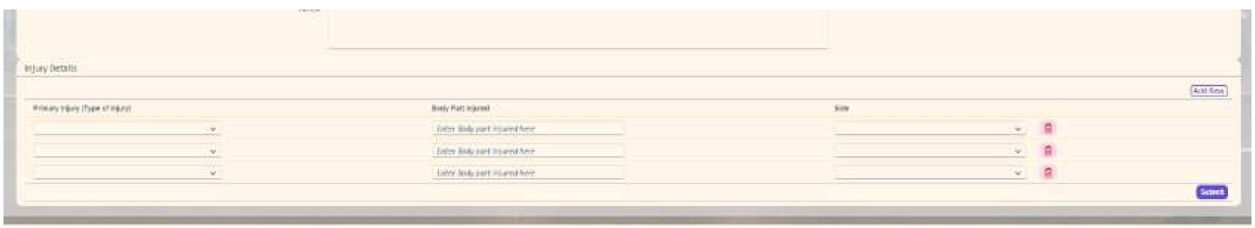


Let’s move to next tab: **WCB**

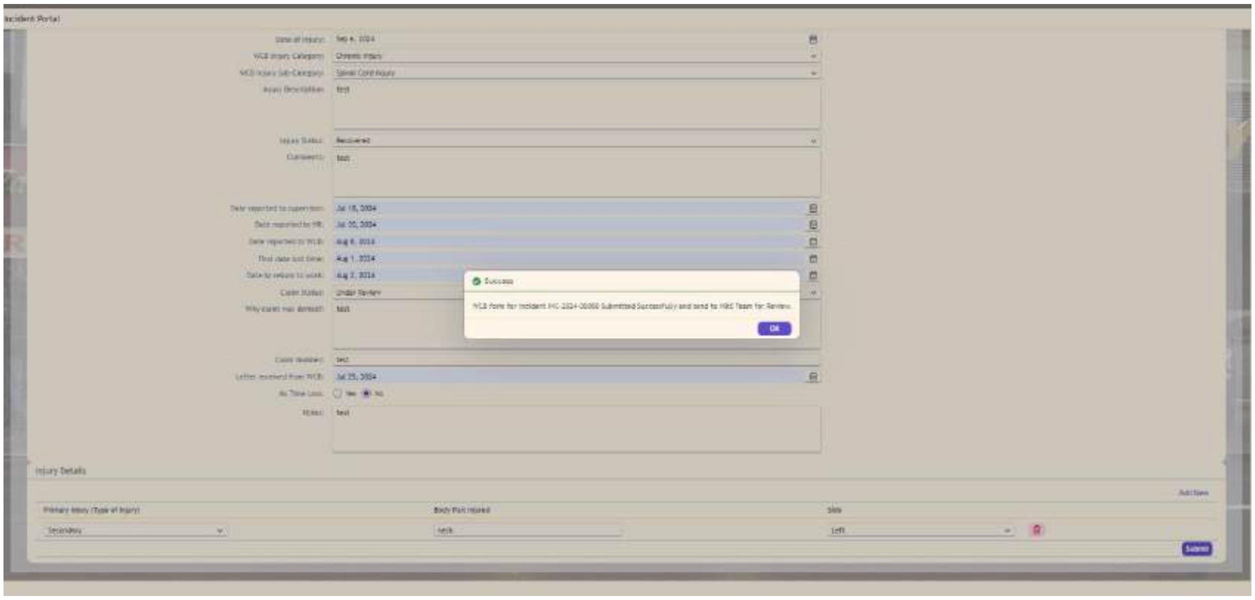


This a form where you have to enter details related to injury happen to you in incident.

This is very simple form where in Injury details you can add multiple injury by clicking on add new button.



Once you fill all the details, click on submit.



Your details will be now saved into the system and this WCB form is sent to Health and Safety Team for Review. This step completes your supervisor’s role responsibilities, and we are ready to move our next role i.e.

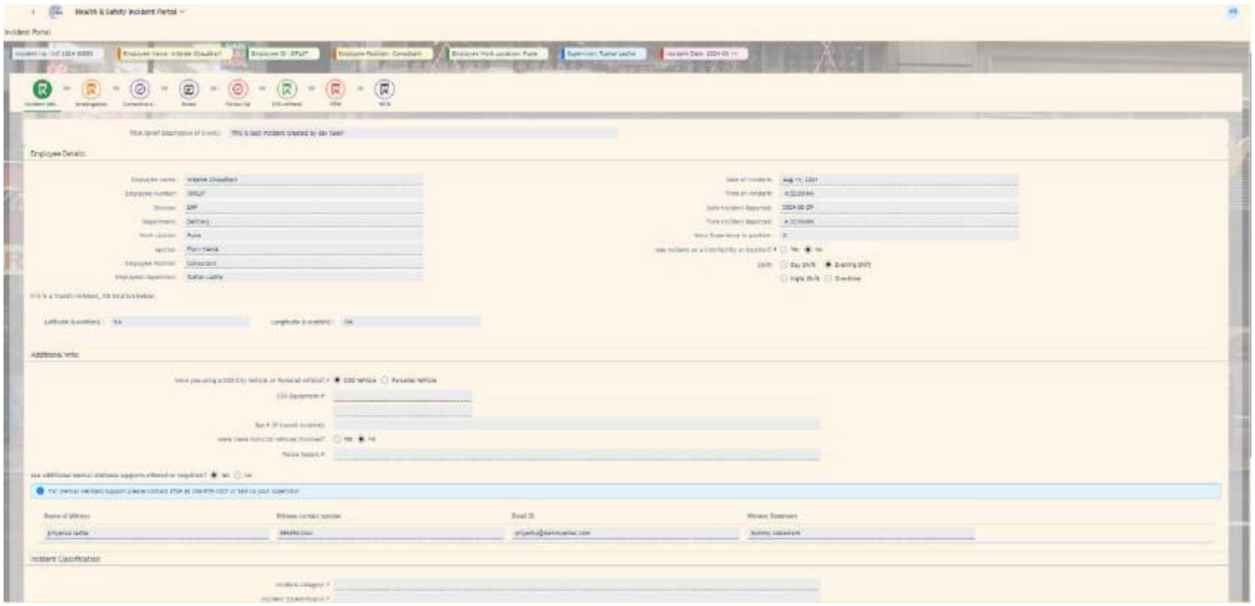
Health and Safety

Health and Safety Incident Portal looks as same as Supervisor’s portal with different functionality. Lets explore H&S Incident Portal with its role capabilities.

Main landing page looks like below.

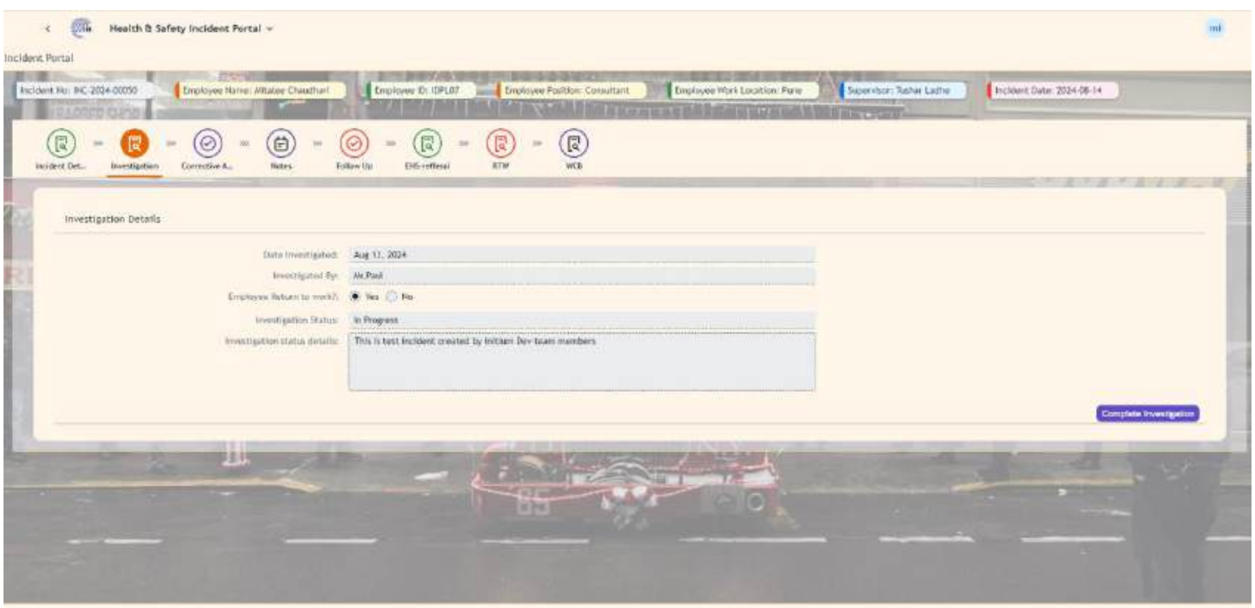
We can enter into system by navigating from the incident number.

Once you click on any incident number, you will be entered into the system and incident details tab will open. For H&S role, this tab i.e. Incident details tab is read only. You as supervisor cannot Update/Insert anything into these details

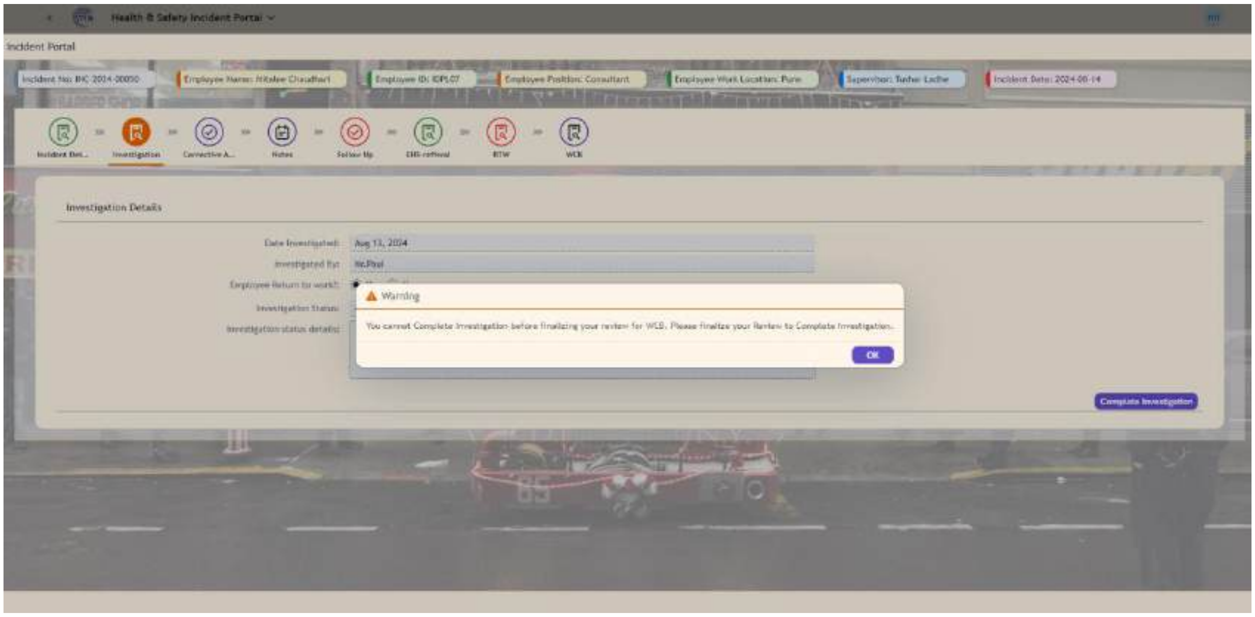


Next tab: **Investigation Details:**

Once you navigate to the investigation tab, you will see all the details filled by supervisor for respective incident's investigation. You as H&S team has authority to mark this investigation as complete.



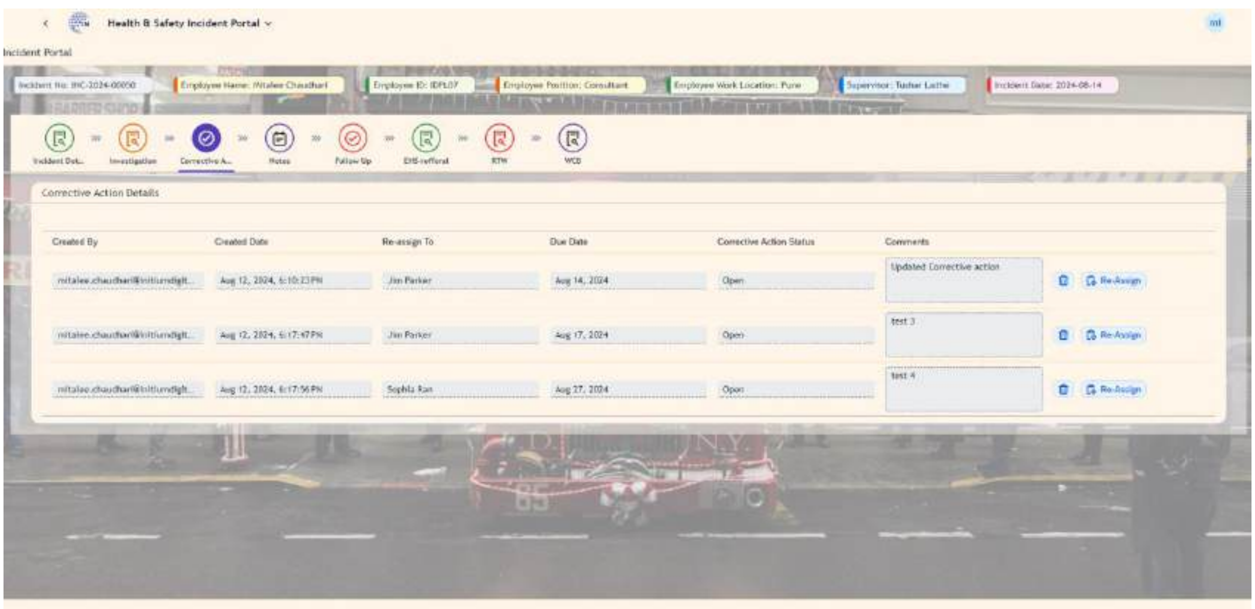
Now if you click on Complete Investigation , a pop up will appear if WCB form is not Reviewed by H&S Team



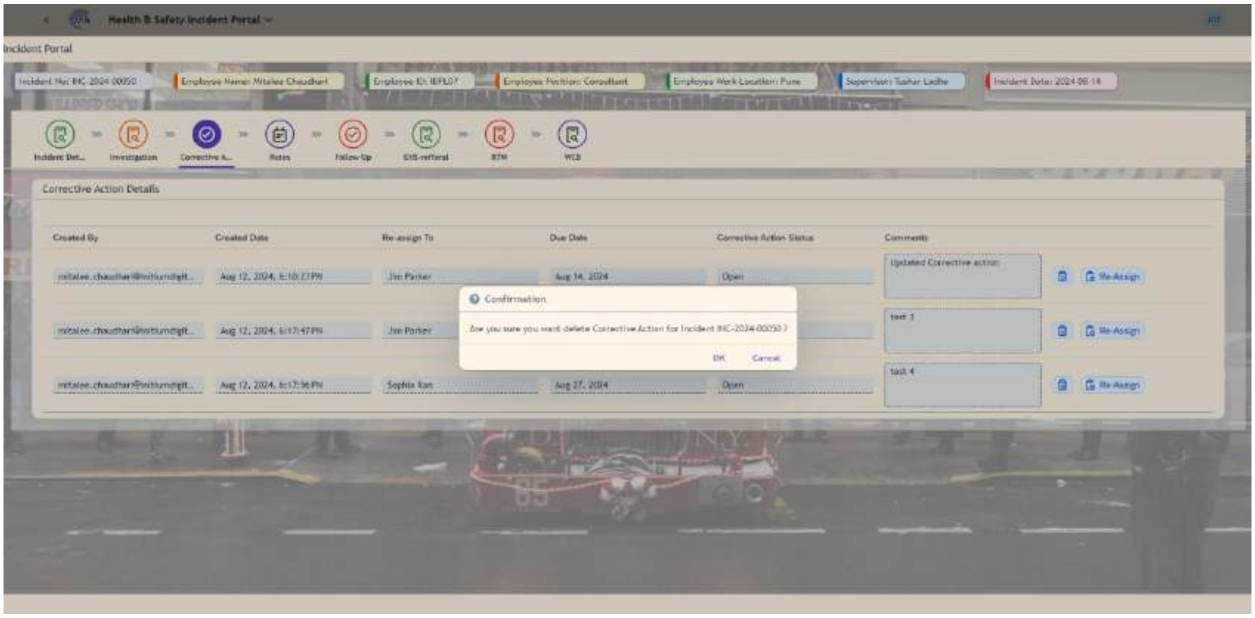
You will have to first finalize review for WCB then only you can mark investigation as complete.

Lets move to next tab: **Corrective Action**

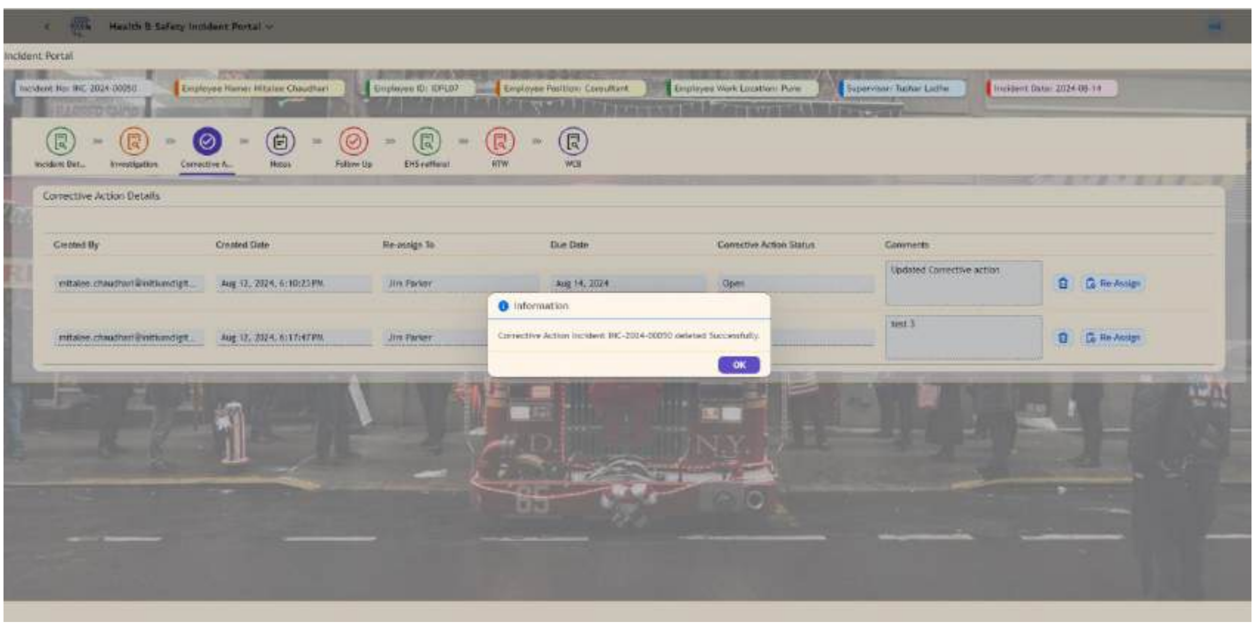
Here you can see the details filled by supervisor. H&S Team cannot add any new Corrective action but can delete any of the corrective action and can re-assign the corrective action and can change corrective action status.



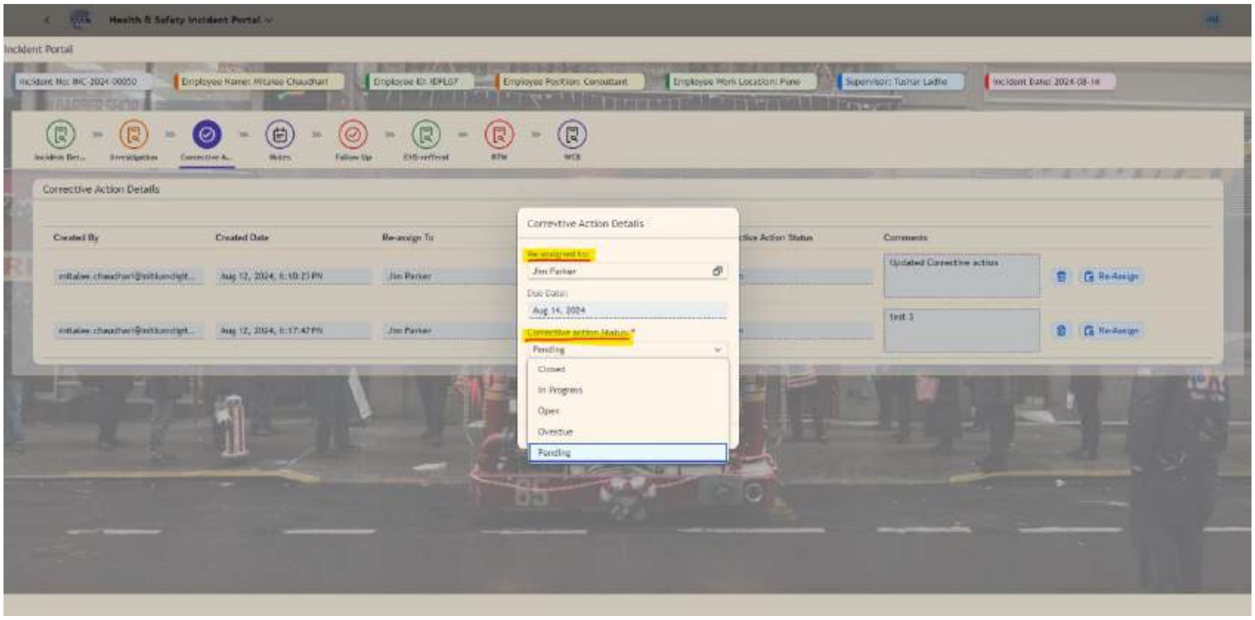
In order to delete the corrective action, you will have to click on delete icon-



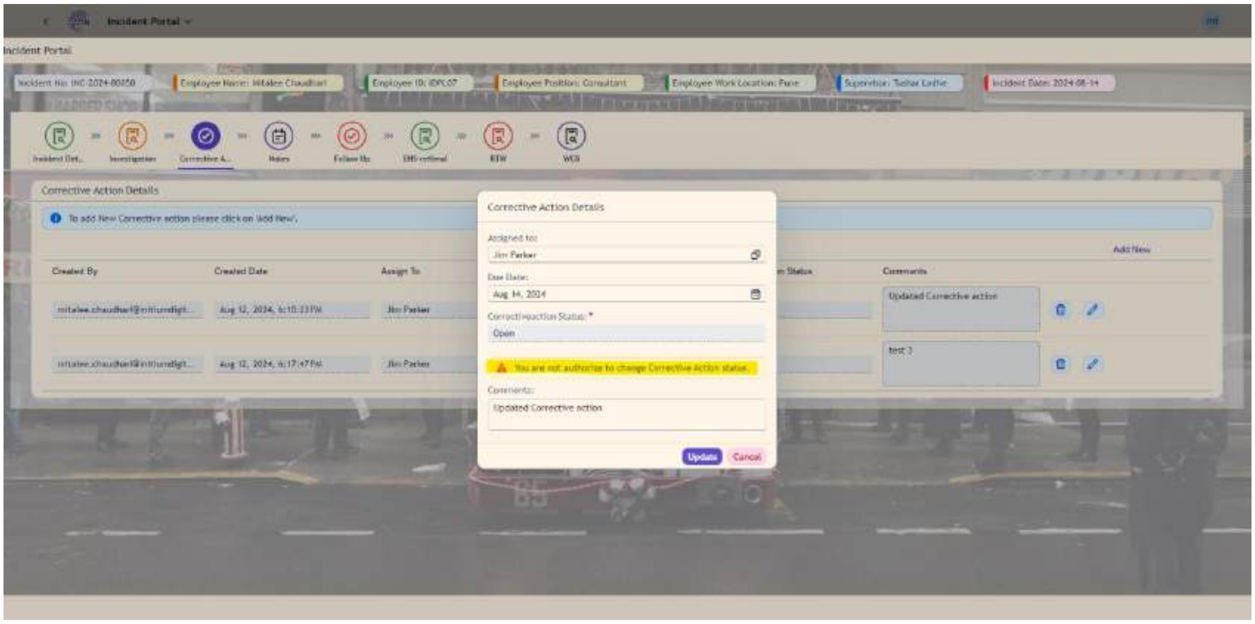
By clicking on Ok your corrective action will be deleted.



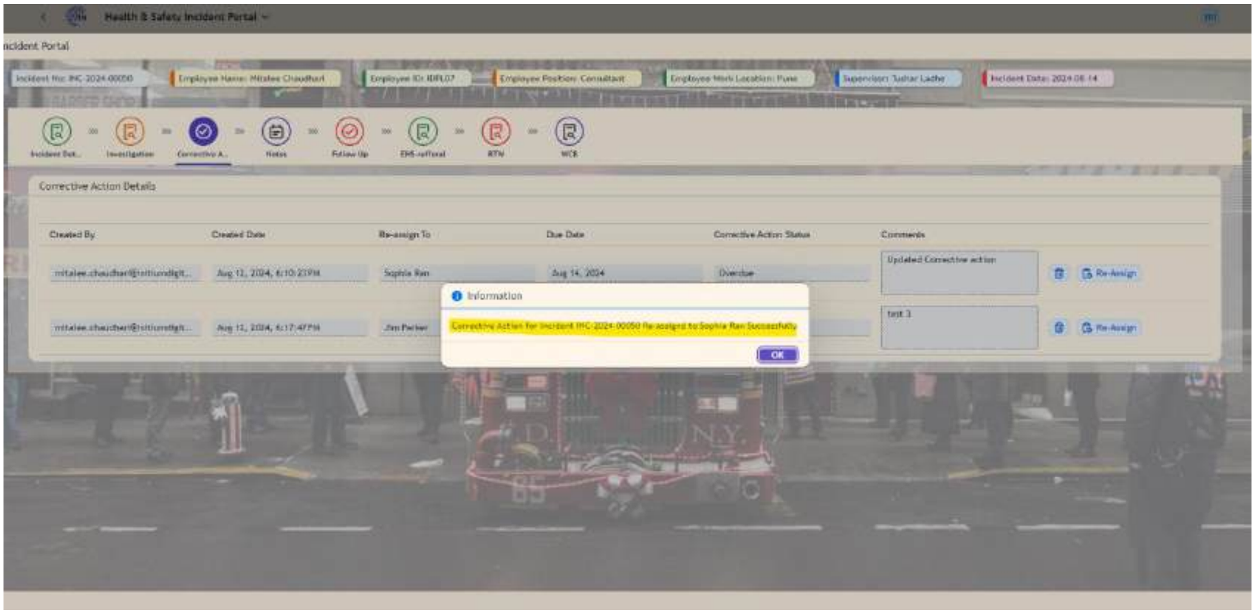
Now if you have to Re- Assign the selected corrective action to any other person, you can click on re-assign and a fragment will open where you can change the details i.e. You can re-assign and can change Corrective action status.



(Manager is not authorized to change corrective action status. Only H&S Team can change Corrective action status. Below screenshot is from manager view just for reference which is indicating manager cannot change Corrective action status.)



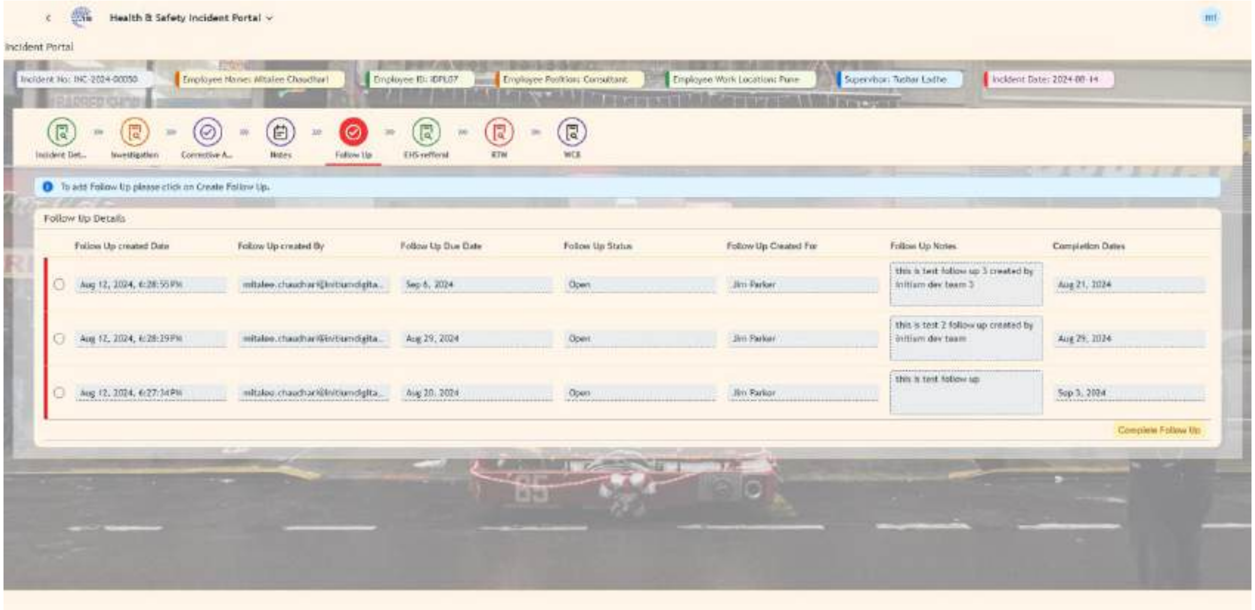
Once you are done with changes, click on update button.



Let’s move to the next tab: **Notes**

The Notes tab for H&S role is as same as Supervisor’s role, you can refer all steps we have done in supervisor.

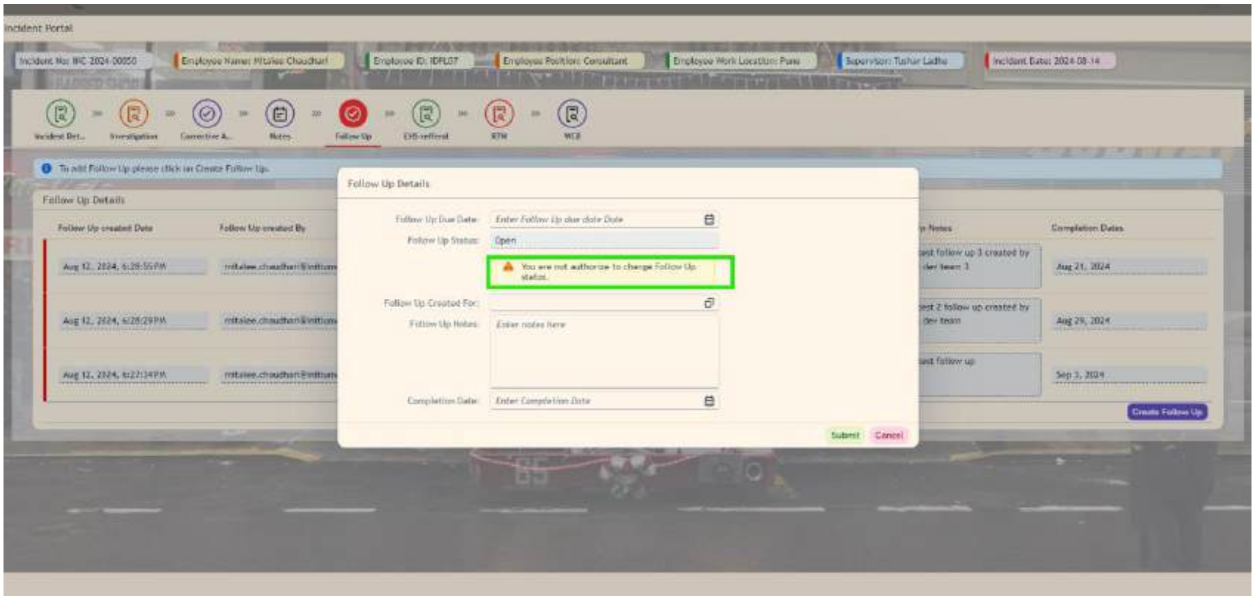
Let’s Move to the next tab: **Follow Up**



H&S Team can see all follow ups created by supervisor for respective incident.

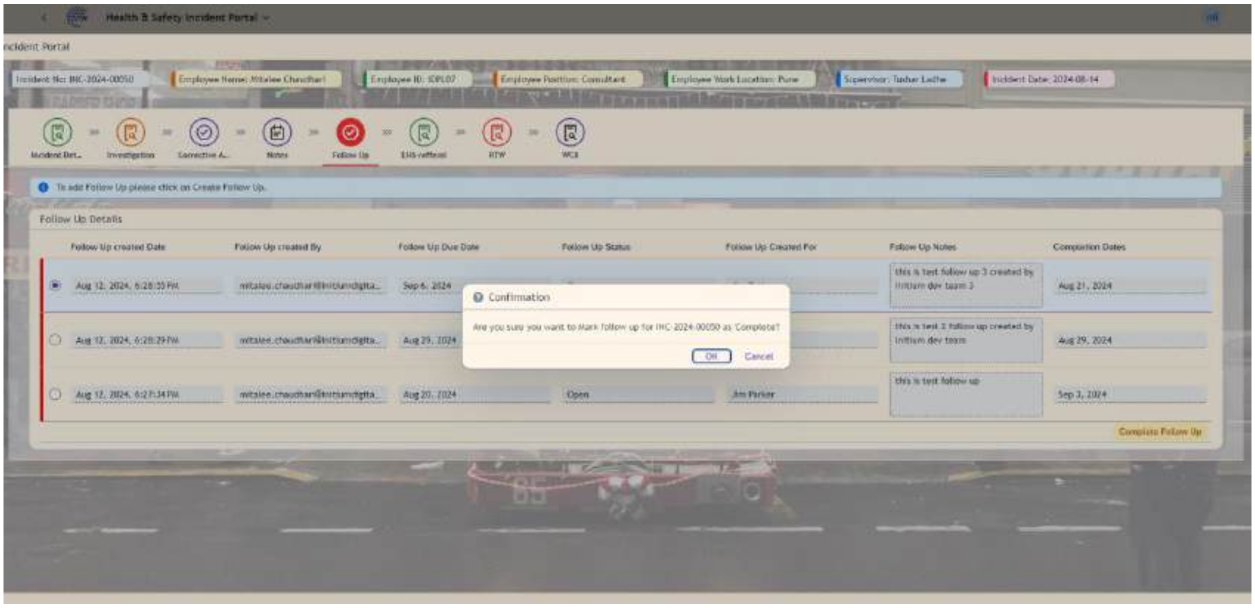
H&S cannot create new follow up but can complete follow up created by supervisor while supervisor himself cannot complete follow up created by himself.

Below screenshot is just for reference from manager view stating manager cannot change follow up status.

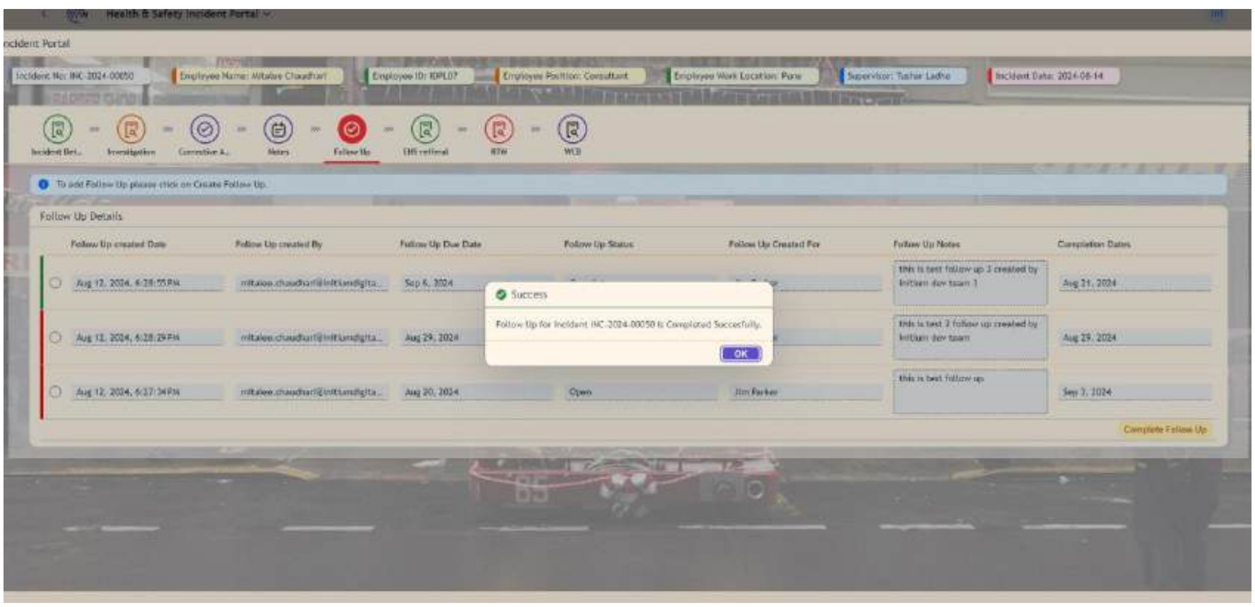


You being H&S Team, can select any of the follow up which you want to mark as complete

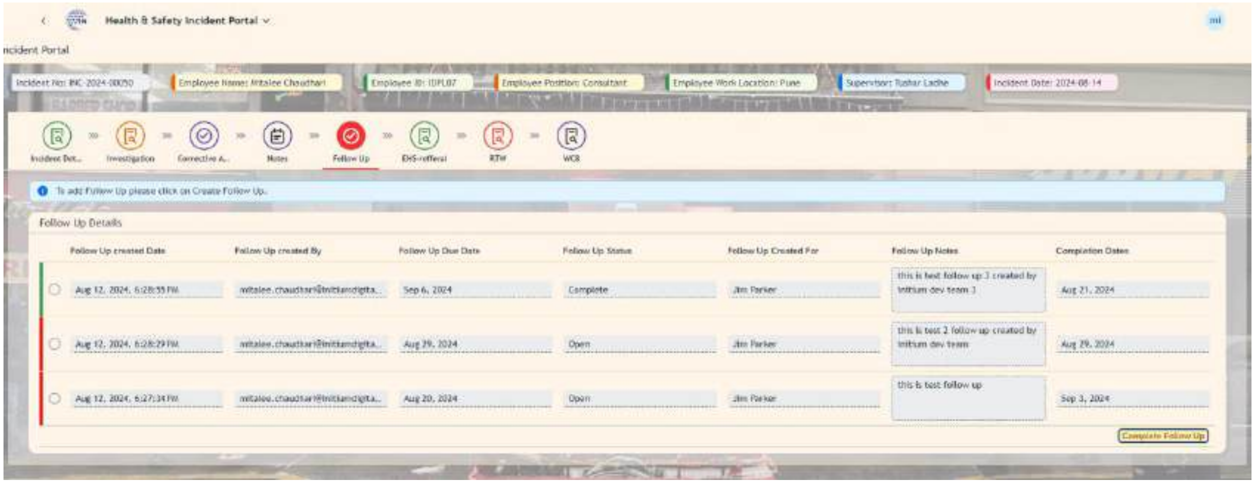
Select the follow up and click on complete follow up. Once you click on button, it will ask for confirmation.



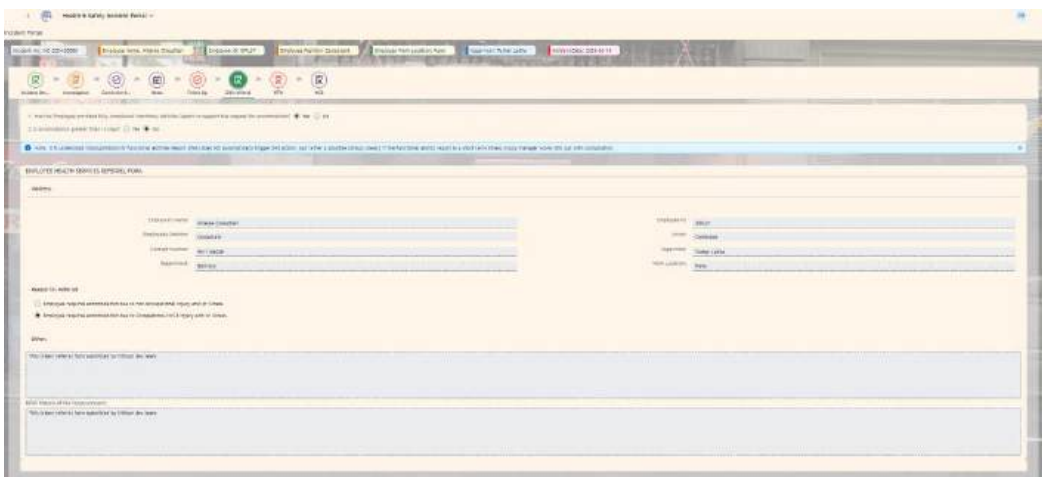
If you click on ok, your follow will get complete



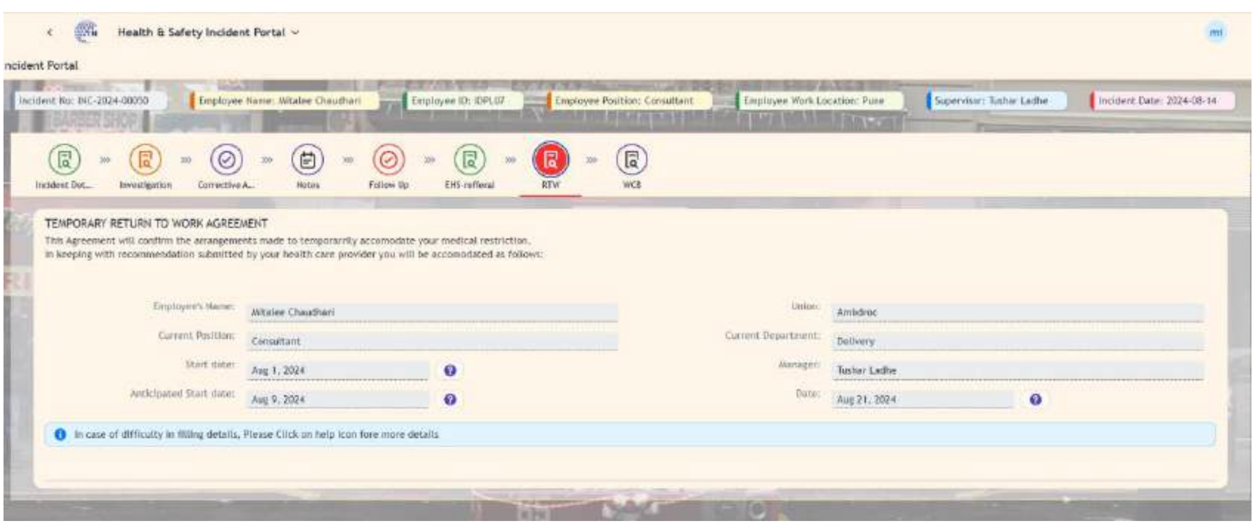
Once your follow up is completed, you can see it in table with row highlighted in green color and status as complete



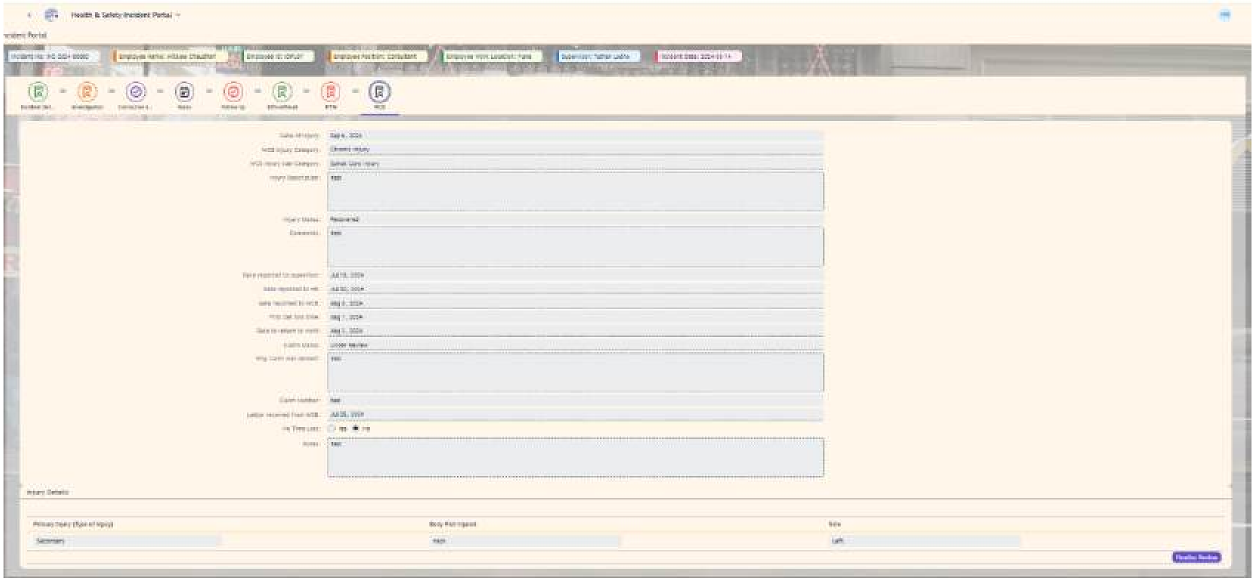
Let's move to the next tab: **EHS-Referral.** This tab is read only for H&S Team. They cannot make any changes in this tab.



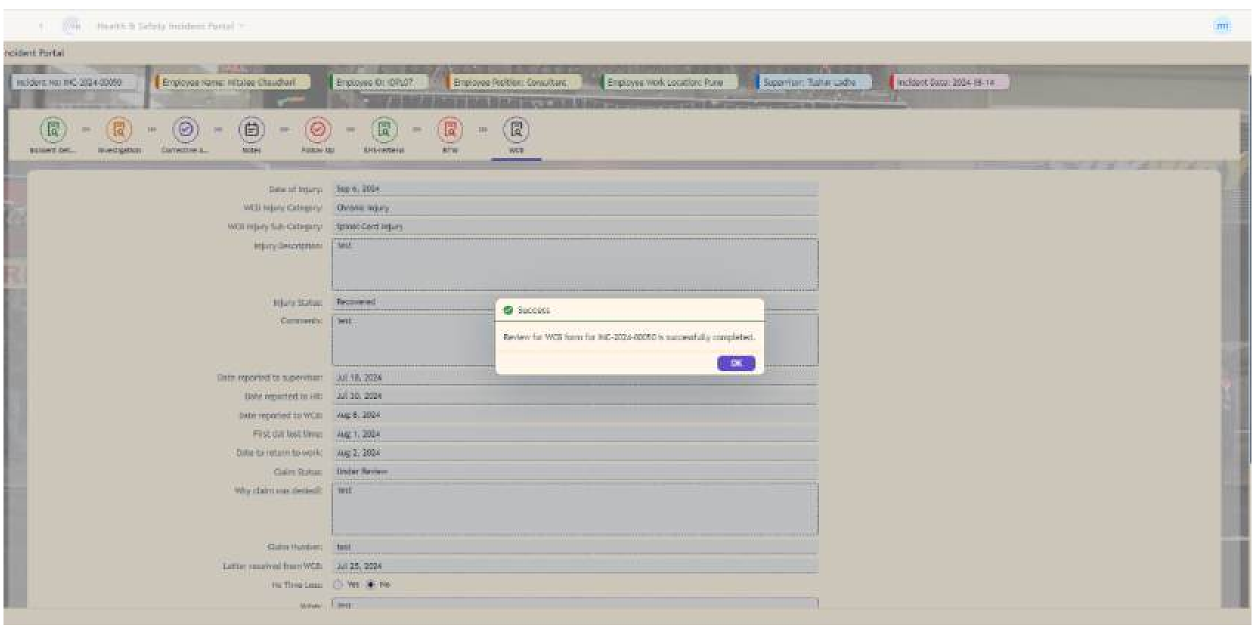
Let's move to the next tab: **RTW** . This is also read only tab for H&S.



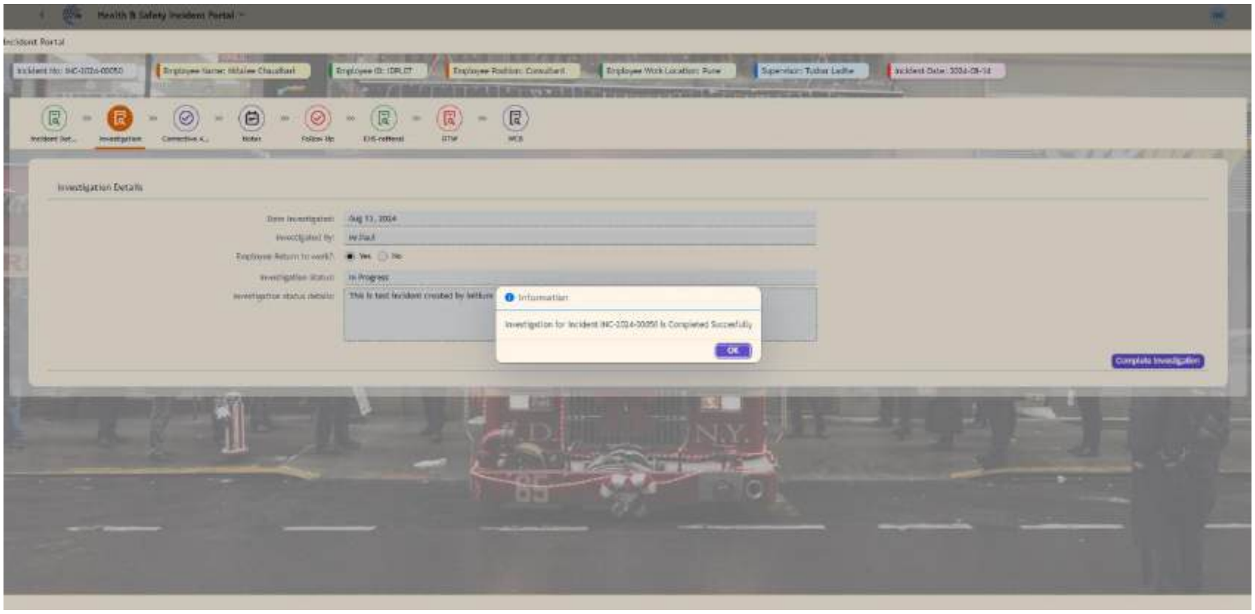
Lets move to the next tab: WCB



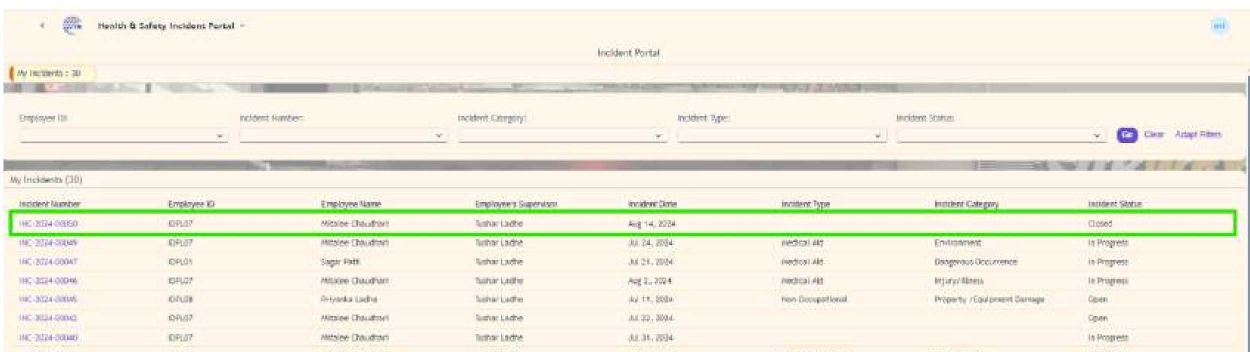
H&S Team cannot make any changes in WCB form, its read only tab for them. But they have to review the WCB form which is filled by manager by clicking on finalize review and once the review is finalize then only H&S can change the investigation as Complete.



Once review for WCB form is done ten H&S can change the investigation status as Complete by clicking on Complete Investigation.



Once Investigation is completed, Incident status will be closed this completes the incident process.



Reporting

The reporting feature provides insightful analytics and visualization of incident data, enabling users to monitor performance, identify trends and make data-driven decisions.

We offer a dashboard, Charts, graphs along with export options in reporting.

Let’s have a look into it as well.

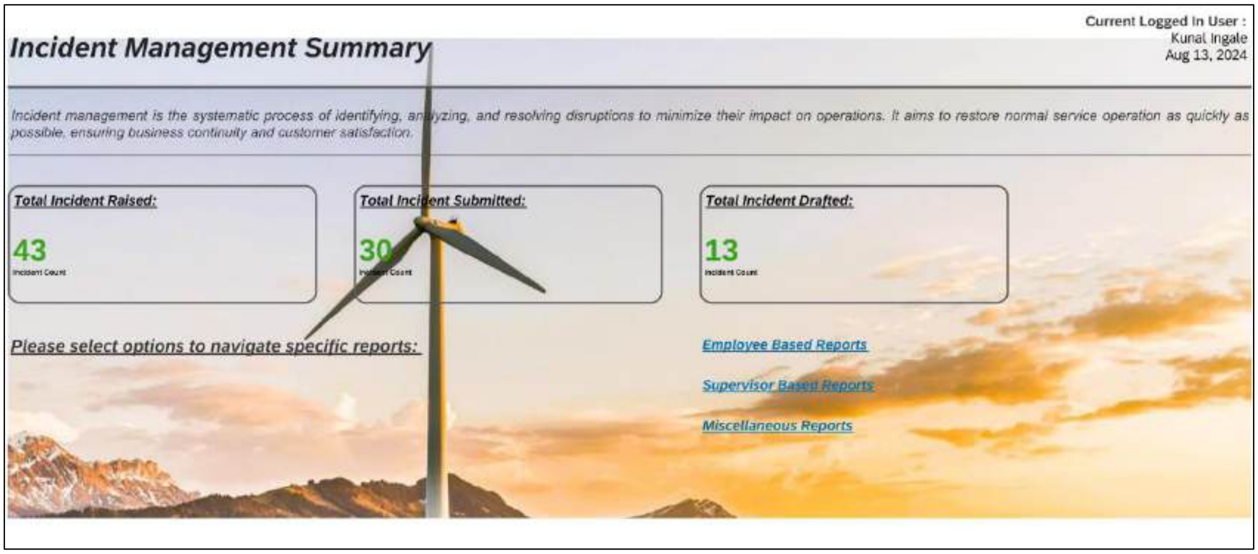


Figure 1. Dashboard Landing Page

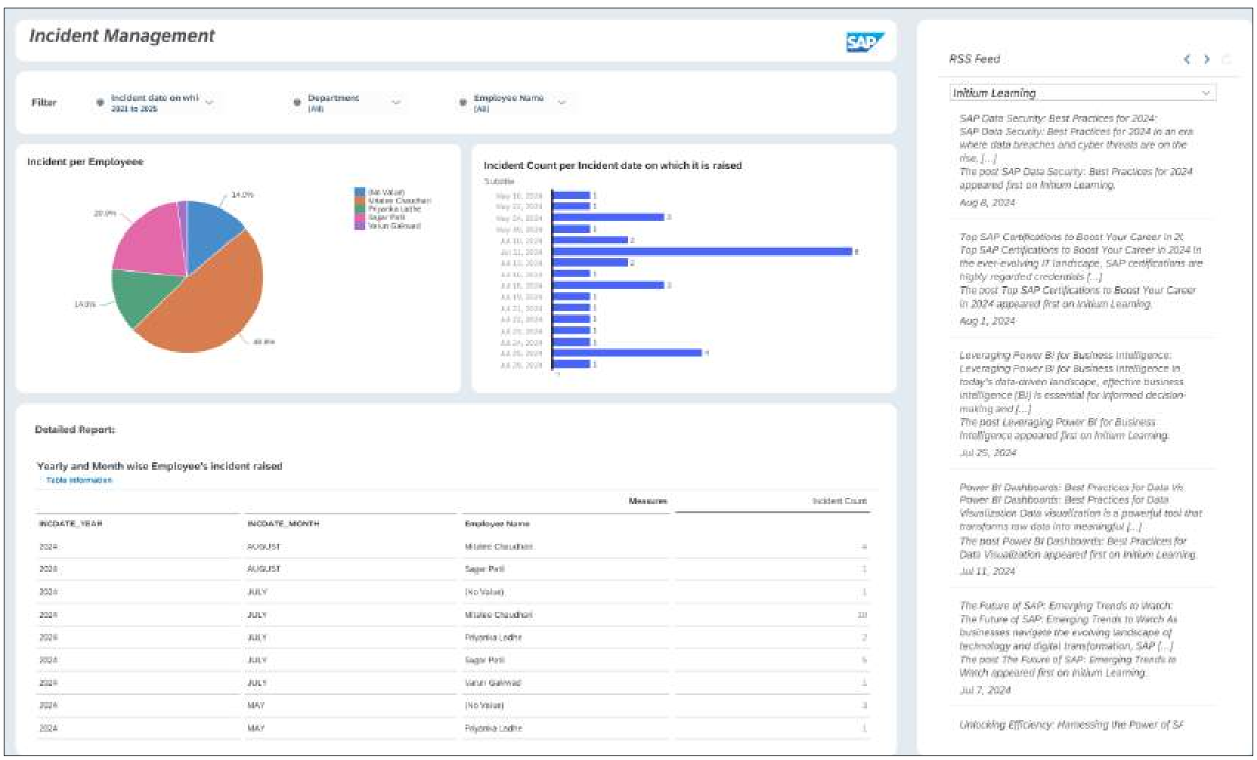


Figure 2. Overall View Page

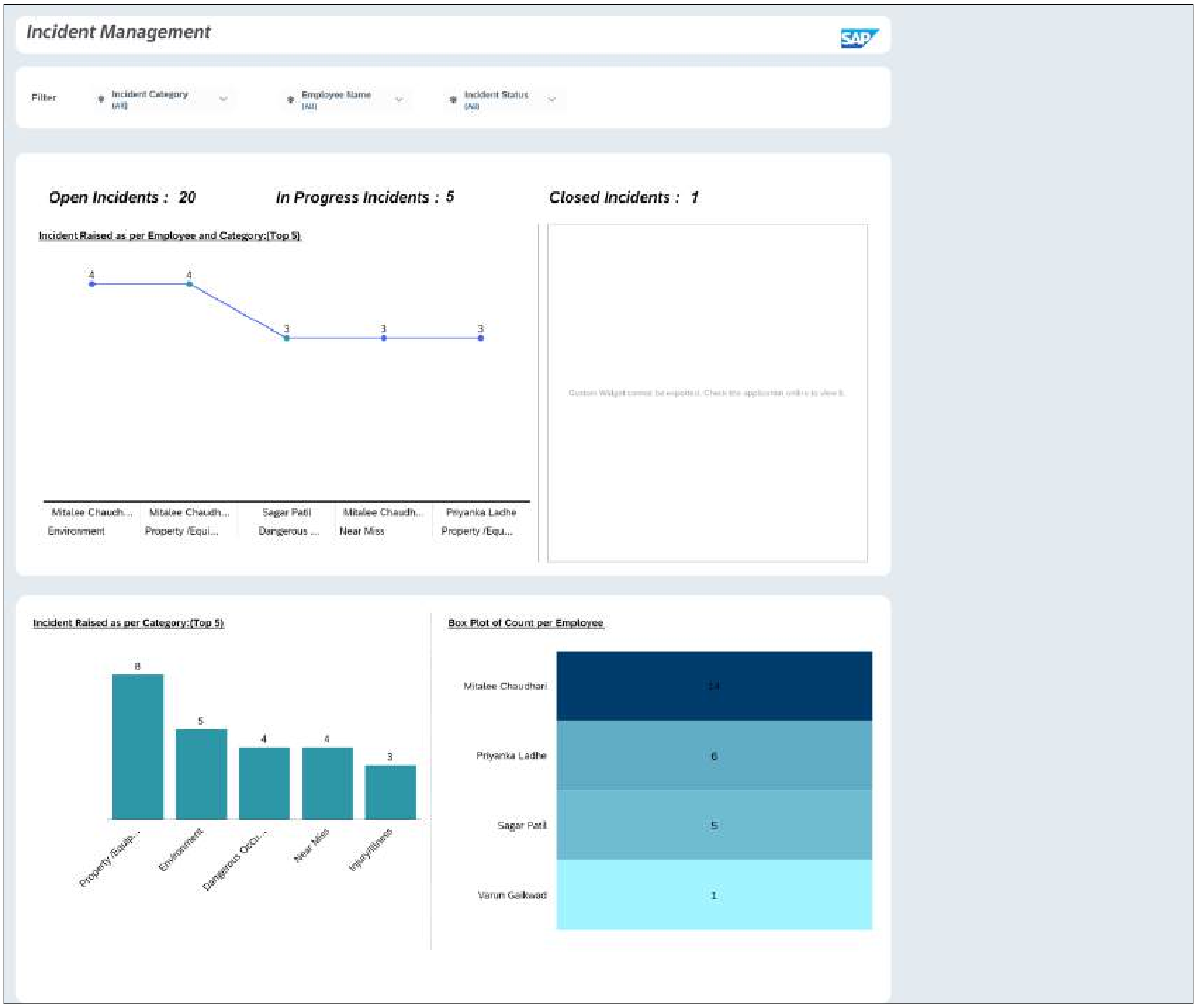


Figure 3. Incident graph as per incident status/Cos Equipment/Employee

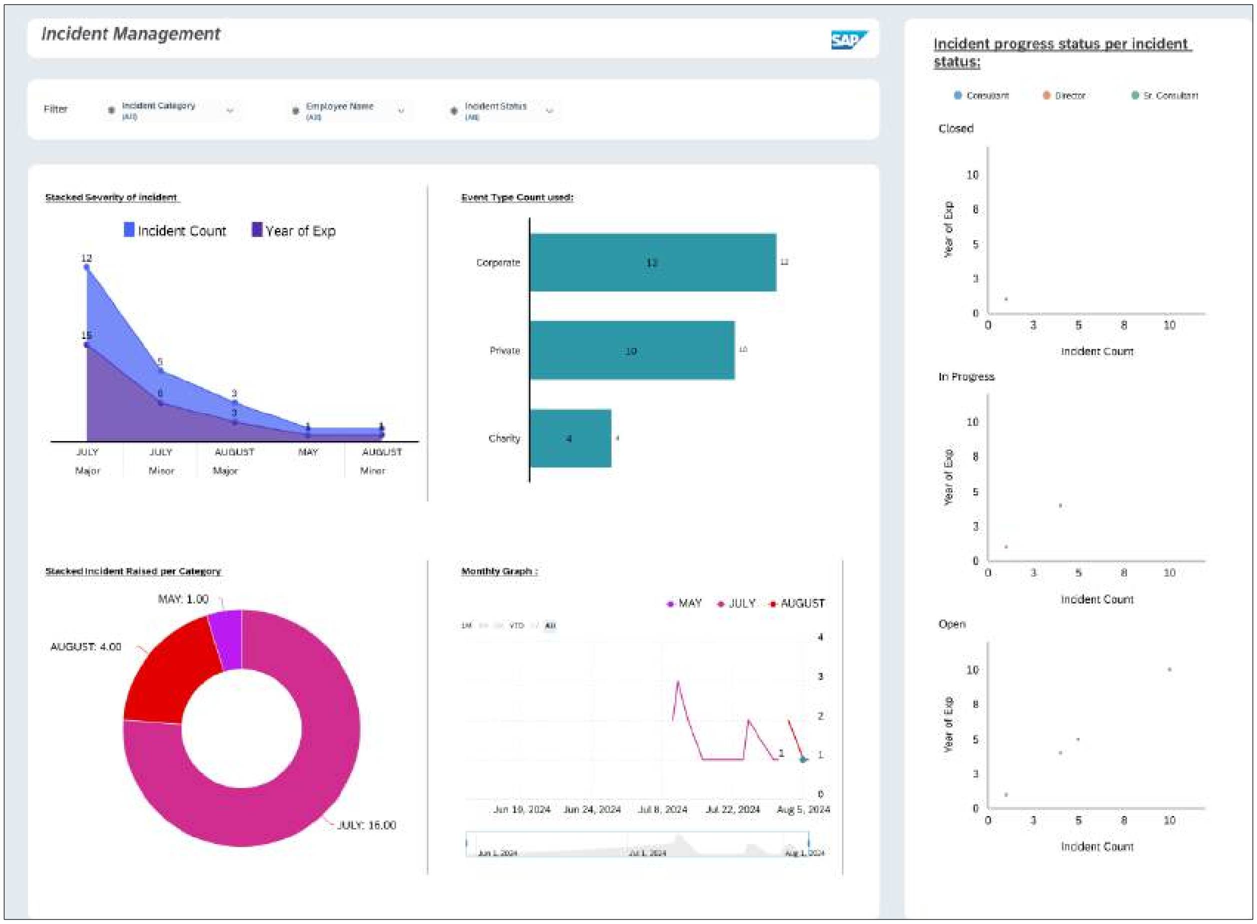


Figure 4. Incident management descriptive Pie chart/Graph

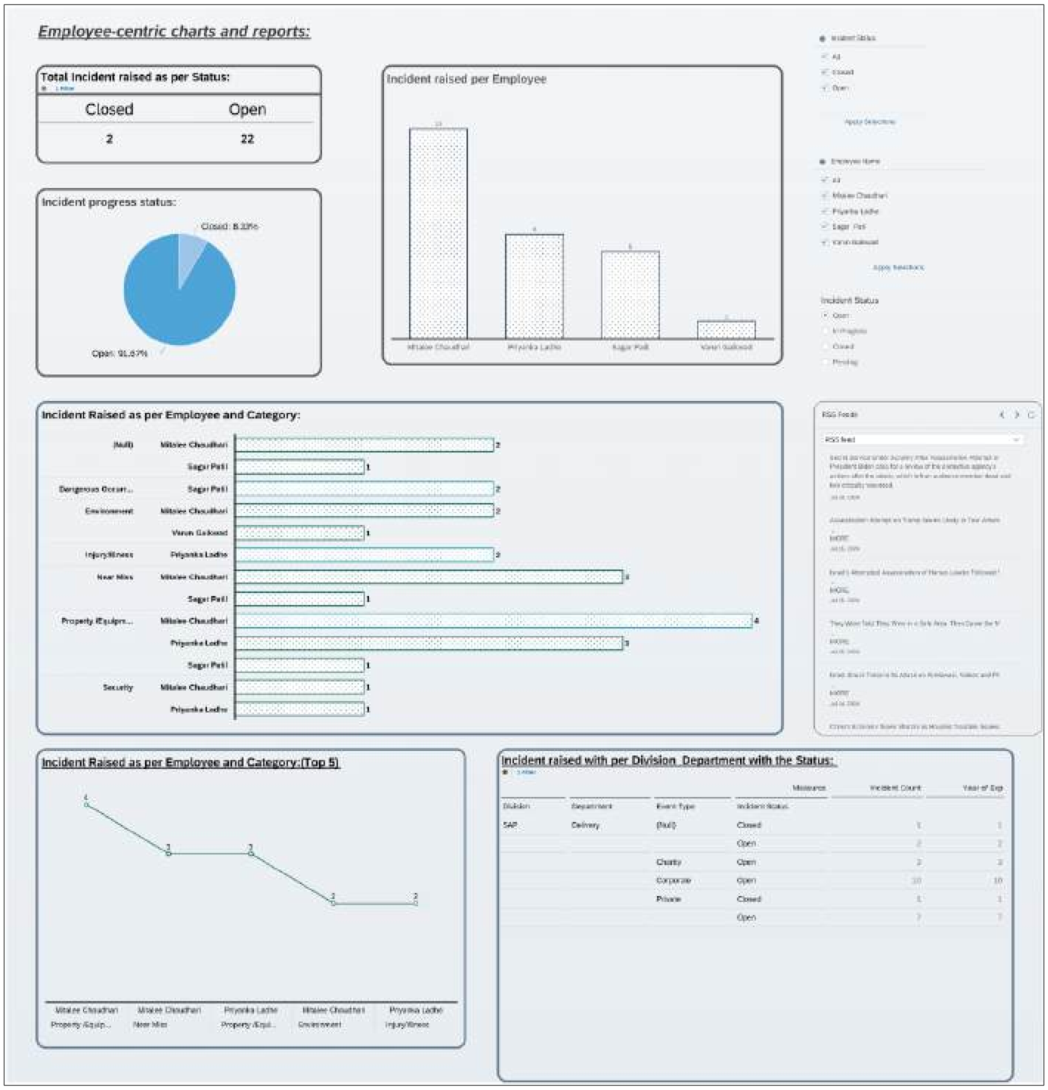


Figure 5. Employee centric Incident charts

Figure 6. Supervisor centric Incident charts

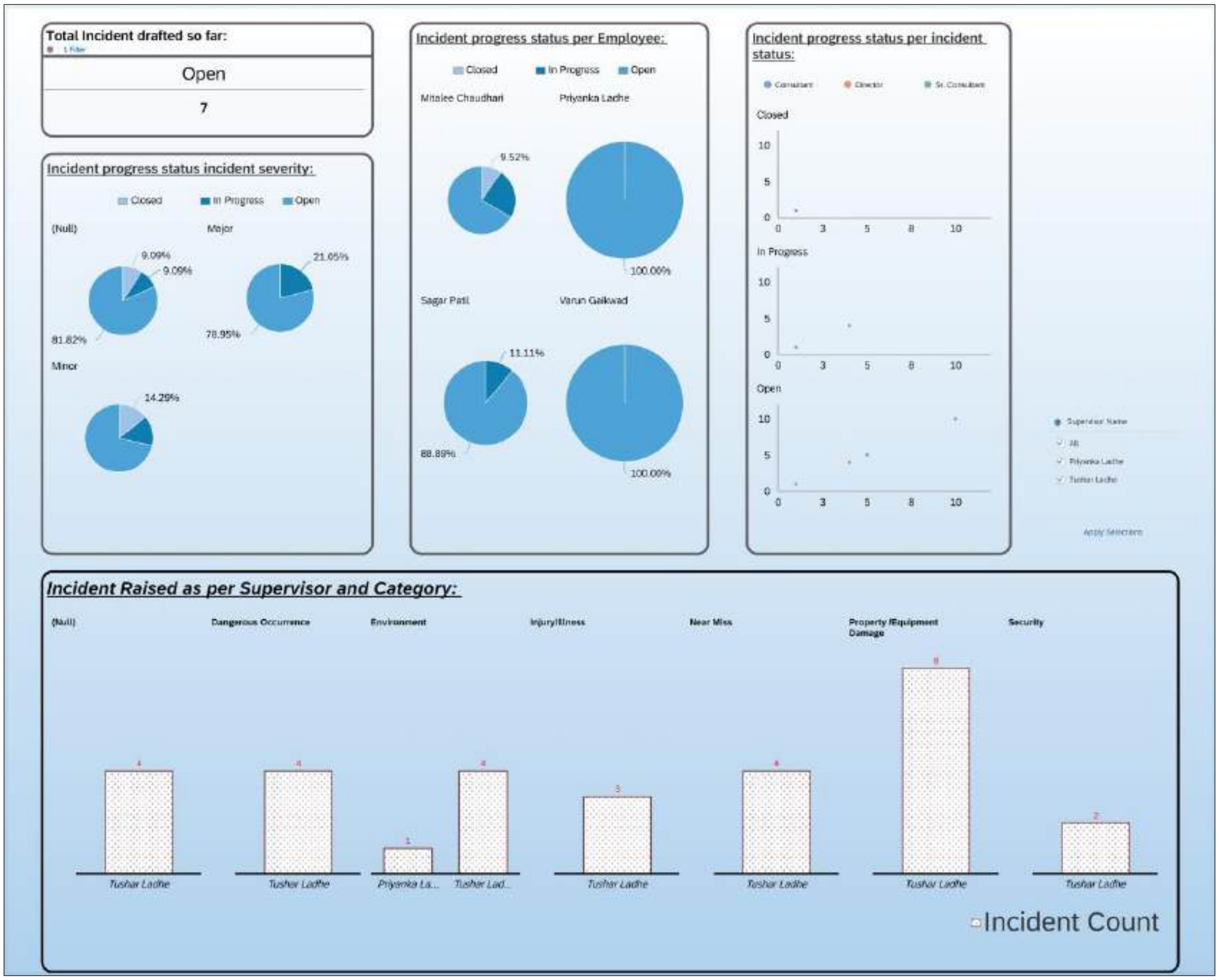


Figure 7. Overall Incident View Page

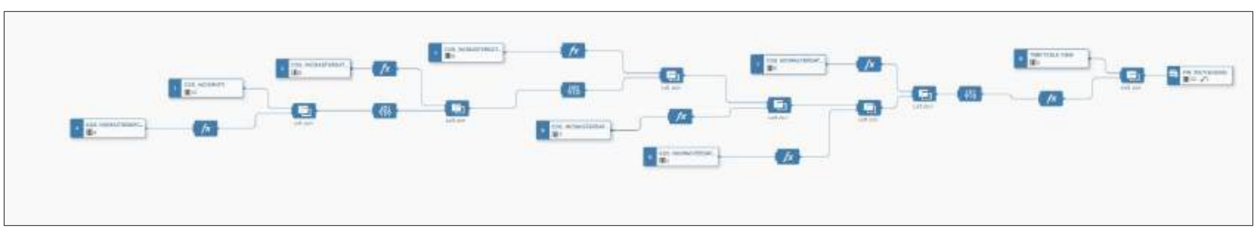


Figure 8. Data Sphere fact view created on basis of multiple remote table

Figure 9. Data Sphere: Remote Tables (Relational Data sets)