Super Administrator Part 3 – Activity Plan and Lists

Innhold

Se også Hjelp knappen som gir veiledning pr. skjermbilde:
Den er her på alle sider:

HJELP   LOGG UT

Gundersen **Avdeling:** Rådmannens kontor   Skriv ut   Hjelp

ens saker

Terminologies & Some background
There are some terminologies and words that are used interchangeably and in different forms. It is important to standardize them. However, we wish to present an overview of the concept here so that these can be easily interpreted dependent on the context:

An Incident / Event / Case is when an employee has something to report. This reporting is done through a Message. The message is generated by filling in a form. This form is generated for the user from a Message form template. The message form template is set up by the Super administrator
When referring to an organization or a department, it is to be interpreted conceptually. This is a multi-level hierarchical structure. If the solution is in use for one company, It could be Divisions, Departments, Sections etc. If it is in use by a Group of companies, it could be Company, Divisions, Departments, Sections, sub-sections and so on.
HES – This refers to Health, Environment and Safety. – Check the link http://www.arbeidstilsynet.no/hms.html for a good understanding. Use Google translate to get the picture.

3 ACTIVITY PLAN

3.1 Definition: ACTIVITY PLAN (control panel) has fixed periodic activities.

- Every activity should be linked to a list, questionnaire etc.
Note! Lists should be activated in Activity Plan for them to be available for responding to. Click on Planning.

Click on New Activity leads to this screen.

All lists are available here: (saved in ADMIN)
- **Check lists,**
- **Questionnaires og**
- **Risk Analysis forms.**

Click «Save» and a new activity is added to «All activities that should be carried out».

3.1.1 This is the most important screen to succeed with internal control.
- *We will succeed with when we involve the employees in risk prevention*, jfr. § 5.3 in HMS-intro, and
- *leaders give feedback*!

3.1.2 RECOMMENDATIONS:
- **Set up at least 4 activities a year – one every quarter.**
- **Use "Send e-mail Notification".**
  - Involve those who will participate by submitting activity with lists by e-mail.
  - Lists can be answered by respondents without having to use username and password, -
  - ... Just click on the link in the e-mail. See leader manual
- **Follow up the status of Activity Plan in <u>every</u> leader meeting!**
- **Show the graph reports of the messages from previous weeks.**

3.2 Results of Risk Analysis influences the list of activities that are included in the plan.

Phase 0: A working group needs to set up a list that is based Event types or a Task / equipment / Item based list.

Phase 1: Let all involved parties participate in the evaluation –
Note! Answered by the working group! Because: Few believe that they have the competence to contribute with just individual answers

QM+ automatically summarizes the answers when they are sent in. This forms the basis for the decision making of the next phase…

Phase 2: Working group creates the analysis

- They use the Risk Message forms to document what security equipment should be used, what should be done to reduce the occurrence of specific event and how to reduce the consequences of the events, if they should occur.

3.2.1 Risk Assessment List (See also guide on Risk Analysis)
Risk Assessment List: Can be set up **Event / incident based** or **Item / object based**

3.2.1.a Event / Incident based list

These are divided on subjects / themes, and questions under each team are a negative incident / event:

The events here are examples of Accidents / negative events.
- **Remove those that are not relevant for your business**

Tailored content!

In co-operation with a working group, the super administrator can tailor these lists and create new lists, in a manner similar to questionnaires and Message forms.

The answer categories are already ready in the forms and come up automatically when the list is filled up with the event or the item.

The risk assessment forms have their own pre-defined answer categories, - that can be changed.

Sannsynligheten angis slik:

1 poeng: 1 eller færre hendelser pr. 20 år
2 poeng: 1 hendelse pr. 10 år
3 poeng: 1 hendelse pr. år
4 poeng: 10 hendelser pr. år
5 poeng: 1 hendelse eller mer pr. uke

Konsekvenser angis slik:

1 poeng: Ubetydelig
2 poeng: Liten materiell skade (< 10000) eller uten sykefravær
3 poeng: Matriell skade (< 100000) eller sykefravær uten varig skade
4 poeng: Stor matriell skade (< 1000000) eller sykefravær og varig skade
5 poeng: Omfattende matriell skade (> 1000000) eller død/invaliditet

The lists are made in the same way as we do for message forms, except for the Answer Categories which are pre-defined = numeric – on a scale of 1 to 5, These can be changed by the Super Administrator. See next page.

3.2.1.b Changing the answer categories in the form

3.2.2 Equipment and task based lists – should contain name of equipment and tasks
Select ADMIN / Forms / Risk Analysis. Select, for example, an existing list.

Yellow icon with pencil provides the option to change the text

Red minus icon provides the option to delete the text

Click here

to edit the name on the list or attach a special «Comment form»

See next page

(**«Comment forms» can be created by the Super administrator in ADMIN/Forms/Message Forms.**)

3.2.3 Where is it possible for the respondents to set in suggestions and responses?

- through the from that is linked.

The linking of Analysis lists with the Message Form should be simpler than what is shown on the next page.
From experience we understand that a lot of people don't feel qualified to participate in Risk Analysis.

Recommendation: Use working groups in all phases when performing risk analysis.

3.2.4 The connected form has a strong co-relation between the content of the list and the categories in the linked form.
All employees can answer the points on the list and comment on the answers using the form that is linked.

ROS-analyse

Kryss av	Avdeling: Førevar kommune	
Risikoarbeid	**Dato / Klokkeslett**	**Bruk sikkerhetsutstyr!**

Risikoarbeid
O Avfallshåndtering
O Bruke blåselampe
O Bruke kjemikalier
O Bruke spikerpistol
O Bruke sveiseutstyr
O Fjerne asbestplater
O Male fasader
O Sm røyting
O T ng
O W ask/fasadevask

Dato / Klokkeslett

_____ / _____
(dd.mm.åå / tt:mm)

Registrert av:

Melder:

Beskriv mulig uønsket hendelse:

Bruk sikkerhetsutstyr!
☐ Bruk hjelm
☐ Bruk hørselvern
☐ Bruk sele
☐ Bruk vernesko
☐ Ekstraperson
☐ Øyevern (brller/maske)

...sisterende sansynlighetsreduserende tiltak:

...sisterende konsekvensreduserende tiltak:

...sikopotensiale

	*	K =	R	
	*	=		Materiell skade
	*	=		Miljøskade
	*	=		Omdømme
	*	=		Personskade

This is also a Category group that should be adapted to the business that uses Analysis Message Form.

The super administrator can also set up an additional category group, for example, if there are additional procedures (Not shown here)

This category group often reflects the subject / theme, task names or the equipment that were considered during risk analysis.

The construction industry normally uses the phases in construction here.

Every category is analyzed using its own message form

RESULTS

are archived together in ARCHIVE and RISK
PDF files can be stored in a separate tab which could be named suitably

The working group summarizes their assessment

At the bottom, they set a value for possibility and consequence of each element

Changes can be made to all completed forms that one finds in the archive. The latest version will be available in the overview table. RESULTS: Remember to put up a PDF file in INFO so that all users, other than the leaders, are also able to see the analysis
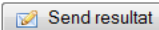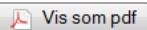
3.2.5 Monitoring / follow up of Risk Analysis

A working group goes through the summarized answers and fills out the message form that is specially set up for this analysis: Decides on the measures to reduce risk when the tasks are being executed, the measures are split into Probability reduction and Impact reduction measures, setting up of instructions and procedures where necessary.

3.2.5.a How do I access reports of surveys of risk?.
- Access results in activity plan and click on the graph icon on the right side of the table.

Resultat

1. Select here

Send resultat   Vis som pdf

Grafer for listen: Risikoanalyse - objektbase

2. Send the graph to all who participated and give your comments in the e-Mail.

3. Click here to access the report as a table.

Aktiviteter vis se grafene:
- risikoanalyse   12.09 - 01.03.10) Kommentarer: 0
Fargekoder:
- Resultat fra de   avdelingen
- Resultat fra und liggende avdelinger

Vis grafen gjennomsnitt ▼

antall
gjennomsnitt

The table report can be saved in a document as a pdf – file and set up in INFO

Ri		**Konsekvens**				
Sannsynlighet		Ubetydelig skade	Liten skade	Skade	Stor skade	Omfattende skade
1 hendelse eller mer per uke		0	0	0	0	0
10 hendelser per år		0	0	0	0	0
1 hendelse per år		0	0	0	0	0
1 hendelse per 10 år		3	6	0	0	0
1 hendelse per 20 år		53	0	0	0	0

Tallene i tabellen representerer antall punkter i risikoanalysen under som er vurdert til den gitte

Bruk av elektrisk utstyr	**Risikotall denne avdeling 1 - 25**
	Risikotall underliggende avdelinger 1 - 25
Vinkelsliper	4
Kommentarer: 0	ingen svar
Slipemaskin - treverk	4
Kommentarer: 0	ingen svar

Click on the numbers to access the specific result.

3.3 More on LISTS

- Checklists, Questionnaires and Risk Assessment lists.
The editing happens in the same manner irrespective of the type of list.

- All lists are based on subject / theme.
Under every subject (Theme) questions are added – statements or points in checklists and Objects or events in risk assessment list. See point 3.4
Example forms. (It is very important to have readable graphs when questions have been answered. The graph reflects the average for a subject (theme).
Note! Not for all answers in the survey)

- Pre-determined answer categories in Check list and Risk Analysis
The answer categories for check lists and risk analysis forms are already preset.
In checklists it is a check box in the message form: *Check if the statement is correct.*

In the Risk analysis form it is a numeric value in the scale of 1 to 5 for Probability and impact. (Risk = P x I)
QM+ automatically multiplies the values and calculates the total risk.
It is possible to see the answers with a couple of clicks.

- Super administrator can set up own answer categories in Message Forms
The super administrator must decide what answer options are useful for every question in the Message Forms.

All lists that should be filled out or answer must first be «activated» in the ACTIVITY PLAN

3.3.0 List Examples

3.3.1.a Checklists – have statements (most often)

"Modify"- icon allows editing of saved lists

Black Arrow deactivates list.

Set in list info: Instructions (Procedures) and connecting to Comment Forms.

Copy the list for major customization

Open List. Add / Remove questions

Give this list to other Super Admins!

Export the checklist to the Library. This enables other QM+ users (businesses), other than your own company to use the list.

Example: General Safety. Next page.

- Example checklist for general safety
Click on ADMIN/Forms of checklists, you will see an image as shown below and select list you wish to modify

Click here

To add a new subject (Theme)

To correct the text in the check list , click on the yellow pencil icon.

Change the name of the list here and add to it a Message Form!

Click here to add a new point in the check list. See next page.

When all the questions / statements are placed in the list: Click Close

Subjects / Themes have a darker background and the font is

Type statement here

Here, you can describe why this question is asked

3.3.1.b Add a message form when you have completed the List elements.

Click "Modify list information" **to attach a message form. That will enable every answer to be «Comment message» that can be**

accessed through the Activity Plan/Comments, or in Graphs / Comment Repots. Button: "modify list information" **screen is shown below:**

Select or add a Message Form

Endre listeinformasjon

Endre listeinformasjon

Vis for språket	Norsk (Bokmål)
navn	Generell vernerunde - Skautun
Listetyp	HMS sjekklister
Registrert av deling	Førevar kommune
Tilknyttet meldingsskjema	HMS-melding
Tilknyttet kategori	Alle kategorier
Kommentar til en	Med denne listen kan du (medarbeider) "sitte vernerunden", dvs. tenke etter: Hvordan er disse forholdene løst der jeg jobber? Kfr.§4 i HMS-forskriften: "Arbeidstakerne skal medvirke ved.... utøvelse av internkontroll". Listen viser eksempler på feil ihht. krav i lover og forskrifter.

Type in instructions on how to use the checklist

This will be on top of the form that s to be filled out.

Select one category. This will enable the comment form to be available.

Endre listeinnhold | Forhåndsvisning | Vis avanserte muligheter | Lagre | Lukk

Click here to select the links that are related to this form

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3.3.1.c How can users answer the checklist? Via e-mail.
The list should first be connected to an activity in the ACTIVITYPLAN, (also see guide for leaders), - before anyone can answer.

When you share the list with employees:
The employees will receive a mail with a link in it.

Clicking the link, the user is sent to the form for answering – there is no requirement to use login details.

3.3.2 Questionnaires – Select Answer Categories that should be associated

Click ADMIN/Forms - Questionnaires

Is created in the same way as checklists: The subject (theme) and questions should first be placed.
The Answer Categories **is what separates the Check Lists / Risk Assessment lists from Questionnaires**

3.3.2.a Find Answer Categories

The screen below is available after the subject (themes) and questions are added:

….. and a new screen comes up as shown in the next page.

Endre svaralternativer

Navn på listen: **Evaluering av ledere**
Meldingskategori tilknyttet: **Om ledere og relevat erfaring**

Endre standard svaralternativgruppe for denne listen
Ja -> Vet ikke (3 alternativer)   🔑 Velg

Vises	Gruppe/Elementnavn	Sortering/Svartype	Svaralternativgruppe
✅	**Ledere og tydelige mål**	Sorter synkende	Ja -> Vet ikke (3 alternativer)
✅	Er målene målbare?	Enkeltvalg	Ja -> Vet ikke (3 alternativer)
✅	Er målene drøftet med de ansatte?	Enkeltvalg	Ja -> Vet ikke (3 alternativer)
✅	Er de kjent for de ansatte?	Enkeltvalg	Ja -> Vet ikke (3 alternativer)
✅	**Har leder erfaring fra tidligere lederjobber?**	Sorter synkende	Ja -> Vet ikke (3 alternativer)
✅	Har leder tidligere erfaring fra ledelse?	Enkeltvalg	Ja -> Vet ikke (3 alternativer)
✅	Er denne erfaringen relevant?	Enkeltvalg	1 Lite flinke -> 3 Veldig flinke (3 alternativer)

📄 Endre listeinformasjon   📝 Endre listeinnhold   📄 Forhåndsvisning   🔑 Ny svaralternativgruppe   ❌ Lukk

Select choices based on subject or question

3.3.2.b Select new answer Category per question and/or per subject
At the bottom there is an option for «New Answer Alternative Groups»

The new groups that you add, will be added to the bottom of the drop down. .

Clicking on the newly added, places the option on the form.

| INFO | GRAFER | ADMIN | AKTIVITETSPLAN | INNBOKS | ARKIV | HJELP | LOGG UT |

Navn: Leder Demo Avdeling: Førevar kommune   🖨 Skriv ut   ❓ Hjelp

Organisasjon   Brukere   Kategorier   Skjemaer   Dokumenter   Roller   Regler

Sjekklister   Risikoanalyser   Meldingsskjemaer   Spørreskjemaer

Endre svaralternativgruppe

🔑 Nytt svaralternativ

Norsk (Bokmål) ▾   Generelle svaralternativer ▾   Nytt svaralternativ: [   ]   ✅ Lagre

Nummer	Tekst	Sortering

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3.3.2.c Select Answer type

… **If you wish to just have a comment. (This can be confusing as the Answer Alternative groups does not disappear when you select «Text»!)**

3.3.2.d Questions in the same form can have different answer alternatives

Alternative answer categories can be found for every question.

3.3.2.e Special Tool:
This tool is needed where an answer to a question requires branching.

…click here

3.3.2.f How does the completed questionnaire look, ...

| Endre listeinformasjon | Endre listeinnhold | Forhåndsvisning | Ny svaralternativgruppe | Lukk |

Click on the Preview Icon,:
- Paper version, or
- **list form, as shown here**

Papirversjon | **Listeform** | Enkeltspørsmål

Trives du på jobben?

Dette spøreskjemaet bruker vi en ang i året. NÅL:Kontinuerlig forbedre vårt arbeidsmiljø.

Samarbeid

Hjelper vi hverandre når vi har vanskelige oppgaver?
- ○ 1 Lite flinke
- ○ 2 Flinke
- ○ 3 Veldig flinke

Beskriv hendelse/feil her og stedet

Er vi flinke til å varsle hverandre når oppgaven vi skal løse berører flere av oss?
- ○ Enig
- ○ Uenig

Beskriv hendelse/feil her og stedet

Kompetansebygging

Har vi klart for oss hva du kan?
- ○ Ja
- ○ Nei
- ○ Vet ikke

Beskriv hendelse/feil her og stedet

The super administrator is aware that:
This text field is just part of a **standard message form**.
(This is linked when the list is created. See ADMIN/Forms)

The leaders who handle responses use the message form in Follow up *Measures / reporting. (The leader can find the answers through GRAPHS /"Comment reports" See leader manual)*

Recommendation:

3.3.2.g Questionnaires with different answer categories should be sent out as single questions – (one question per screen).

Here you can see that the comment field is available along with answer categories.

(Note! Check lists and Risk Analysis do not have this possibility! In these cases, the comment option comes on page 2 in a table after the user has clicked on save!)