Super Administrator Part 2 – Message Forms

Antall skjemaer + svarkategorier avhenger av virksomhet
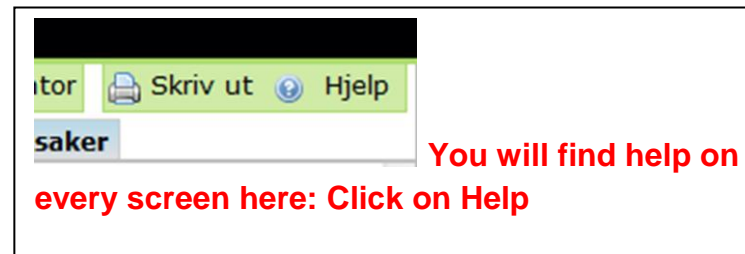
Klikk i GRAFER
Qm+ **oppsummerer automatisk** alle registreringer

Leder ser alt!

Aktivitetsplan

Risiko-lister

Sjekk-lister

Spørre-lister

Meldinger

HMS-melding

Risikomelding

LOGG- kvalitetsmelding
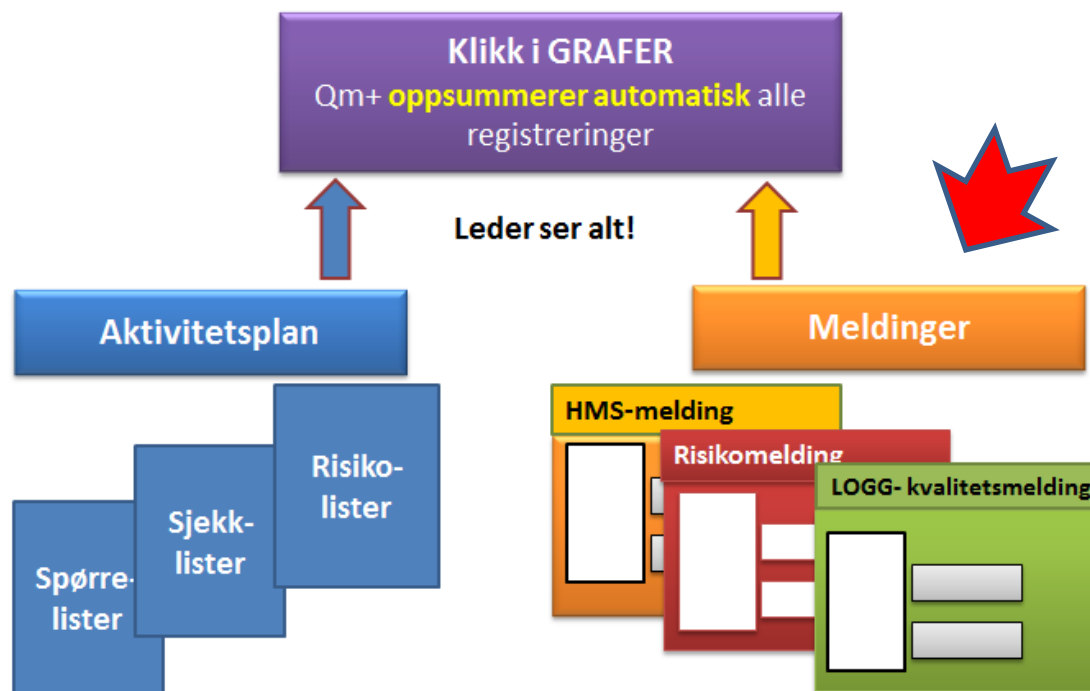
Leder bestemmer skjemaer og svarkategorier som gir grafene

Innhold

You will find help on every screen here: Click on Help

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.

2. Message forms – 3 Types

2.1 Message, Log and SJA-message (Safety-Job-Analysis)
- Qm+ has inbuild ready to use suggestions for all these forms. All of them can be modified by the Super Administrator

Click on ADMIN/forms and you have 3 Tool bars
A table is presented with different forms which the Super Administrator can modify and adjust to their requirements, or create new contents in the list.
The contents of the form should be adjusted to the requirements in general of the Domain and contracts.
This is dependent on the nature of business: *what services or products are being delivered or shall be delivered*

Every message form can be distributed electronically once they are linked to an activity in the activity plan, see leader manual.

All forms that are ready for use, are available for the users, *at the bottom of the first page after login in QM+*

When there are <u>more than</u> 4 types of forms, there is a button «Register new message».

When there are 4 or less types of forms, then it is shown as in the screen shot here.

Definition:
1. Message: Notification, Deviation, comment. **Should be followed up. (Yellow Button)**
2. Log Message: Shall not be followed up, is just a **checklist for what is done. (Green button)**
3. Safety-Job-Analysis: Shall be filled up for an hazardous job, - **before job starts. (Reddish brown)**

2.1.1 ICON - Explanation

Click ADMIN/Forms/Message Form + Select Modify form (Form icon with a pencil)

Click here to modify an existing form.

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

Navn: Leder Demo **Avdeling:** Førevar kom

Organisasjon | Brukere | Kategorier | Skjemaer | Dokumenter | Roller | Regler

Sjekklister | Risikoanalyser | **Meldingsskjemaer** | Spørreskjemaer

Aktive skjemaer | Deaktiverte skjemaer | Fellesbibliotek

Meldingsskjemaer

Skjemanavn	Laget av	Fra avdeling	Dato	Arves	Endre
...ersmelding m/analyse (IA)		Førevar kommune	21.03.02	Ja	
H...melding		Førevar kommune	02.11.01	Ja	
R...alyse	Leder Demo	Førevar kommu			
Va...ermelding	Leder Demo	Førevar kommu			

Nytt skjema

Black arrow deactivates the form. You can find this in the "Deactivated

Only for leaders, Case Handlers and Safety Representatives.

Clicking here opens the navigator. The user can choose the department.

Click here to create a new form.

The Blue icon helps you to export the form to «Common Library».

Exporting to the common library provides access to this form to all QM+ users. They may import it to their solution

2.2 Editing a new Message Form, – or modify an existing form

Click ADMIN and Forms, select Message Form for example for HMS(HES):

Organisasjon	Brukere	Kategorier	Skjemaer	Dokumenter	
Sjekklister	Risikoanalyser	Meldingsskjemaer	Spørreskjemaer		
Aktive skjemaer	Deaktiverte skjemaer	Fellesbibliotek			

Clicking here opens the modification screen for an existing form.

Meldingsskjemaer

Skjemanavn	Laget av	Fra avdeling	Dato	Arves...
Drift av vannverk	Leder Demo	Førevar kommune	21.03.12	Ja
Fraværsmelding m/analyse (IA)		Førevar kommune	21.03.02	Ja
HMS-melding		Førevar kommune	02.11.01	Ja

To create a new form, click here.

Nytt skjema

Organisasjon	Brukere	Kategorier	Skjemaer	Dokumenter	Roller	Regler
Sjekklister	Risikoanalyser	Meldingsskjemaer	Spørreskjemaer			

Endre meldingsskjema

This is the topmost part of «Modify Message Form»

Vis for språket	Norsk (Bokmål)
Skjemanavn	HMS-melding
Tekst til knapp	HMS-melding
Fra avdeling	Førevar kommune
Skjematype	Melding
Anonym	Nei
Informasjon	Her logges alle hendelser - ønskelige og uønskede (UH), hms-feil, mangler og avvik. Aller helst retter vi feilene - hvis mulig -, før vi logger. Prosess: Alle meldinger går automatisk til linjeleder når melder klikker Lagre. Mål: Lære av hendelser positive og negative.

Click here to set the message type

Skjematype	
Anonym	Melding
Informasjon	Melding
	Risiko
	Logg

Set in the instructions here

Vis skjema   Vis avanserte muligheter   Lagre   Lukk

"Show Form"- Click on the button to see the form.

Remember to «SAVE»

7

2.2.1 Bottom part of «Modify Messageform» shows more options.

If you are creating a new form you must have clicked on "SAVE" in the previous screen to get this form.

| Sjekklister | Risikoanalyser | Meldingsskjemaer | Spørreskjemaer |

Informasjon

Her logges alle hendelser - ønskelige og uønskede (UH), hms-feil, mangler og avvik. Aller helst retter vi feilene - hvis mulig -, før vi logger. Prosess: Alle meldinger går automatisk til linjeleder når melder klikker Lagre. Mål: Lære av hendelser positive og negative.

Click on one of the tabs to decide:

- **Category choice**,
- **Number of fields and names**
- **Which are the documents** that should be linked
- **Link the form to a «Role»**, if required, so that only persons who have the same role can access the form, and
- **Rules** that define who can handle cases, be notified and approve the eventaul measures on the messages created on this form.

| Kategorier | Felter | Dokumenter | Roller | Regler |

Kategorigruppe HMS-områder   **Vis som** Avkrysn...

Legg kategorier til meldingsskjemaet. (De aktive kategoriene er i den venstre ruten)

Ny kategori

On page 11 there is an explanation on what needs to be done such that categories are seen here

Avfall
Brannsikring
El.anlegg
Farlig avfall
Heiser
Inneklima
Internkontroll mat
Kjemikalier
Klimagasser
Krisesituasjoner

<< Legg til

Vises for underavdelinger ☑

Fjern >>

Biler og trucker
El.utstyr
Fysisk arbeidsmiljø
Krenkande atferd frå brukar
Lekeplasser
Nestenulykke
Psykososialt arbeidsmiljø
Ran
Skade med fravær
Vedlikehold: Bygg og miljø

Kategorier i dette meldingsskjemaet

Kategorigruppe: HMS-områder, Kategorigruppetype: Definerende kategori. Valgtype: Avkrysningsboks

Kategorinavn	Fra avdeling		Avhengig av
Avfall	Førevar kommune		
Brannsikring	Førevar kommune		
El.anlegg	Førevar kommune		

Vis skjema   Vis avanserte muligheter   Lagre   Lukk

Dependencies:

It is decided here as to which category selections enable new other selections to come up in the form

Page 12 shows the options that are available through this button for placement of category groups (Indexing).

Recommendations:
Ensure that you are at right department on the navigator.
It is smart to be at the topmost level in navigator when setting up the categories in the category table. (Access from ADMIN/Categories). This enables you, through the modify screen, to determine which categories are available **for respective departments.**

2.3 Add New Categories and Category Groups

- Definitions:

Category Group is a collection of categories. These are used in Message Forms to create graphs.

If you do not find the catgory you want, click here.

Select Category Group here

Click to add new Category

These are the elements in New Category:
- Category name,
- priority and
- cost
- also link to relevant laws and procedures

2.3.1 Categories are linked to MessageForms

A Message Form can have various categories depending on the subject / nature of business.
Message Forms are to be used whenever employees come up with a good idea, a negative situation / event, a deviation or have a comment to an event (customer complaint or praise). *All Messages should be categorized.*

2.3.2. The Super Admin sets up the categorization.

Important to be clear about:
- **What kind of statistics do the leaders need or wish for?**
-

The process generally starts with a meeting where the participants discuss and arrive at the required category groups. Generally Paper, Pen and Board are used to discuss and put down ideas.

When the leaders and the participants / stakeholders have decided on the cateogrization, the Super Administrator can set this up for the MessageForms.

2.3.2.a Purpose of categorization is to generate graphs.

The selected categories are automatically summarized in the Graphs in QM+.

Note! The categories should not contain sensitive personal information such as health information.

2.3.3 Categories are first set up in a table before they can be used in MessageForms,
- though they can also be directly set up in the MessageForm.

1. **Select Form.**
   You see a modify screen

2. **Select** Category **Groups**

3. **Highlight** those that you wish to use and add them sothat they are in the left box with yellow highlights

4. **If you do not find a category** that you wish to add to «Case Type»

   Click on New Category (Directly add category)

Here, you can decide whether the category groups should be on the left or the right side. See page 12

2.4 Category Groups

2.4.1 The left column has radio buttons (round) = select one

This option allows you to select just one.

If the category group is defined as « Defining», the background will be of a darker colour. (Yellow-Beige)
In this case, the user has to select an option in order to save the form.

2.4.2 The right colum and middle column have check boxes = multiple choice.

The user has an option to select multiple options.

2.4.3 Create new category group = Collection of categories

Vis for språket   Norsk (Bokmål)

Kategorigruppetype   Flervalg
  Definerende kategori
  Enkeltvalg
  Flervalg
  Tiltak
  Tall
  Risiko

Kategorigruppenavn

Fra avdeling

Informasjon

Organisasjon   **Brukere**   **Kategorier**   **Skjemaer**   **Dokumenter**   **Roller**

Ny kategorigruppe

Vis for språket   Norsk (Bokmål)
Kategorigruppetype   Definerende kategori
Kategorigruppenavn
Fra avdeling   Førevar kommune

Informasjon

There are 6 options in this drop down.

Standard Placement
This is how category groups are set up in the messageforms:

Definerende – place on left column
Single Choice – Place on right column
Multiple choice – in right columne
Measures – in the middle column
Numbers – Bottom of the right column
Risks – Bottom of the middle column

Standarad placements can be modified by the Super Administrator. See next page.

2.4.4 Super Administrator canchoose whether category groups shall be placed on the left or right columns
- This is done from the Modify screen of the Message Forms

The screen below is available in the «Modify Message Form» screen

1.
Click on View Advanced Options

2.

Select «Index»

+

Save

3.

Click here to decide on the new position of the cateogry groups in the messageform.

Note! If you do not click on save in Step 2, these options are not available.

2.5 More details on modify options

2.5.1 About Dropdowns – Which category groups shall have a drop down menu?

2.5.2 What will be shown in the Case Handler Screen? use "Show advanced options"

2.5.3 Links can be placed in the top left of the MessageForms.
- Click Admin and Forms, Select messageform for example for HMS:

1. Click Documents

2. Highlight the link………

4. Here are the list of links that will be shown on the MessageForm

3. ..and click on «Add»".

If categories should have links, Select Categories, See Page 8.

- Go to the Categories Tab. View the catetory table. Select the categories that require a link.

It is our experience that most people do not read the rules and procedures unless they are placed at the right contexts, the relevant forms. Hence, it is possible for the Super Administrator to set up links in all forms in QM+. It is much easier to look up the relevant rules when they are needed when they are placed appropriately.

2.5.4 Roles can be attached to forms too (not just to users and departments!)

Kategorier **Felter** **Dokumenter** **Roller** **Regler**

Legg roller til meldingsskjemaet. (De aktive rollene er i den venstre ruten)

HMS roller
AMU medlem
Brannvernleder
Tillitsvalgt
Verneleder
Verneombud
Ingen
Revisorer

<< Legg til
Fjern >>

If it is only AMU Members who can register messages using this form, Add Role "**AMU member**".

Warning:

When roles are set to forms, all users who dont have a role are automatically excluded from using the form.

2.5.5 If a form is given a role, you can give the same role to a department.

- This means that the form will be visible only to those departments that have the same role. This is important for organizations with a horizontal structure

Avdelingsnavn   Tekniske områder
Underavdeling av   Førevar kommune

Avdelingens roller
Brannvernleder

Rollebank
Ingen
Revisorer
HMS roller
AMU medlem
Verneleder
Tillitsvalgt
Verneombud

<< Legg til
Fjern >>

INFO GRAFER ADMIN AKTIVITETSPLAN INNBOKS ARKIV HJELP LOGG UT

Navn: Leder Demo **Avdeling:** Førevar kommune

Organisasjon Brukere Kategorier Skjemaer Dokumenter Roller Regler

Endre avdeling

Avdelingsnavn   Tekniske områder
Underavdeling av   Førevar kommune

Click here.

Vis avanserte muligheter Lagre Lukk

2.5.6 Add / Delete fields, modify number of rows and columns, hide text etc.

For example:
for some messages, it is important to hide the contents in the tables for those who don't have the right to read these conents.

This is to set whether a particular field is mandatory. Mandatory fiels are highlighted with Yellow. See screenshot.

Note! Click «Save» everytime you have added a value or the values may be overwritten.

Kategorier	Felter	Dokumenter	Roller	Regler				
Tekstfelter								
Feltnavn				**Skjult**	**Obligatorisk**	**Rader**	**Kolonner**	
Beskriv hendelse/feil her og stedet				☐	☐	5		
Ditt forslag/strakstiltak				☐	☑			
Hva mener IT om denne saken				☐	☐	2	0	

Legg til felt

Kostnadsfelter	**Slette**
Feltnavn	
Feilkostnad	

Legg til felt

✔ Lagre

Slik blir tekstfeltet obligatorisk i utfyllingsskjemaet:

HMS-områder
- Avfall
- Brannsikring
- El.anlegg
- Farlig avfall
- Heiser
- IK mat
- Inneklima
- Kjemikalier
- Krisesituasjoner
- Nesten-ulykke
- Orden/renhold
- Revisjon/oppl.behov
- Sikring/personvern
- Støy
- Tilrettelegging
- Trivsel/mobbing
- Tyveri / innbrudd
- Ulukke/nestenulukke (se nedafor)
- Vann og avløp
- Vedlikehold/miljø

Meldingstype
- Avvik
- Forbedringsforslag

Dato/Klokkeslett
23.11.11 / 10:18

Registrert av:
Leder Demo

Melder:
Leder Demo

Beskriv hendelse/feil her og stedet:

Ditt forslag/strakstiltak:

Konsekvenser
- Klage fra kunde/pårørende

Konsekvenser - generelle
- 1 dags fravær
- 2 dagers fravær
- 3 dagers fravær
- 4 dagers fravær
- Dårlig effektivitet
- Dårlig læringsmiljø
- Erstatning
- Feilernært/vekttap
- Tap av betydelige datamengder

Årsaker
- Annen årsak
- Arbeidsrelatert sykdom
- Barnepassers sykdom
- Barns sykdom
- Blandet muskel-sosial-psyksisk
- Brøt regler
- Dårlig samarbeid

2.5.7 Notification Messages should be set up as a separate MessageForm.

It <u>can</u> be anonymous: nn in "Originator"-field and it is sent to a pre-defined Case Handler (See Rules). The dis-advantage of this is that there cannot be any communication between the reporter and the case handler.

The reporter is protected by the Arbeidsmiljoløven (Work environment law) § 2.5, and hence anonymous reporting is not required. However, the reporter who feels unsafe to notify should be able to do so through his safety representative

In addition the «Describe event» field should be hidden for the immediate leader and the other leaders of the relevant department. This is to do with personal privacy amongst other principles. It should be difficult for those other than the pre-defined case handler and the reporter to read the message about who is accused or referred to and what it is about.

2.5.8 Recommendation on use of Category groups in MessageForms.

It is important to use the forms over a period with a stable list of categories.
This would help to correctly reflect the trends and tendencies.

Systemic errors can be detected.
The categories that repeat themselves point to a system failure in the company. .
Hence it is important that the super administrator does not modify categories often. It could, for example, be once in 6 months.

A Message Form could have a long list of Check boxes. It is generally smart to start with limited category groups and categories. The interest to register a message will reduce if the forms are too complex. On the other hand, if a check box "Others" is used too often, it defeats the purpose of categorization and this too can be irritating.

The category groups that are defined should reflect the theme and objectives of the questionnaires
Message forms are linked to Questionnaires, check lists and risk assessment forms.
The message forms function as a comment / suggestion field in the questionnaire.
Hence it is important and valuable that the purpose / subject is related correctly and are relevant to the categories set up in the related messageform.