



AVEVA™ Operational Safety Management

11.2.3

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Welcome to Operational Safety Management 11.2.3

With AVEVA™ Operational Safety Management, you can plan and perform safe, compliant working on complex engineering assets.

- Work permit management
- Work activity plotting
- Isolation planning and execution
- Risk assessment
- Safe job analysis

The intended audiences for this documentation are the various users of AVEVA™ Operational Safety Management Web Application, including:

- Field personnel
- Operators
- Supervisors

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OSM Web User Guide

AVEVA™ Operational Safety Management

Plan and perform safe, compliant work on complex engineering assets. AVEVA™ Operational Safety Management enables asset operators to eliminate, minimize, or mitigate operational risk while optimizing asset performance.

Reduced risk

- Consistent, compliant, best-practice execution of invasive tasks eliminates, minimizes, or mitigates risks to personnel, to the asset, and to the environment.
- Enforced use of validated procedures minimizes the risks associated with shutdown and restart.
- Verification of sustained regulatory compliance avoids the risk of fines or loss of operating licenses.

Reduced operating costs

- Efficient deployment and use of valuable skilled resources saves direct labor costs.
- Efficient, rapid execution of engineering tasks minimizes loss of production.
- Robust control and audit trails reduce the costs of demonstrating regulatory compliance.

What's new in Operational Safety Management?

What's new in this release of AVEVA™ Operational Safety Management.

- [OSM Web 11.2.3 Release Notes](#)
- [OSM Web 11.2.2 Release Notes](#)
- [OSM Web 11.2.1 Release Notes](#)
- [OSM Web 11.2 Release Notes](#)

2024 Releases

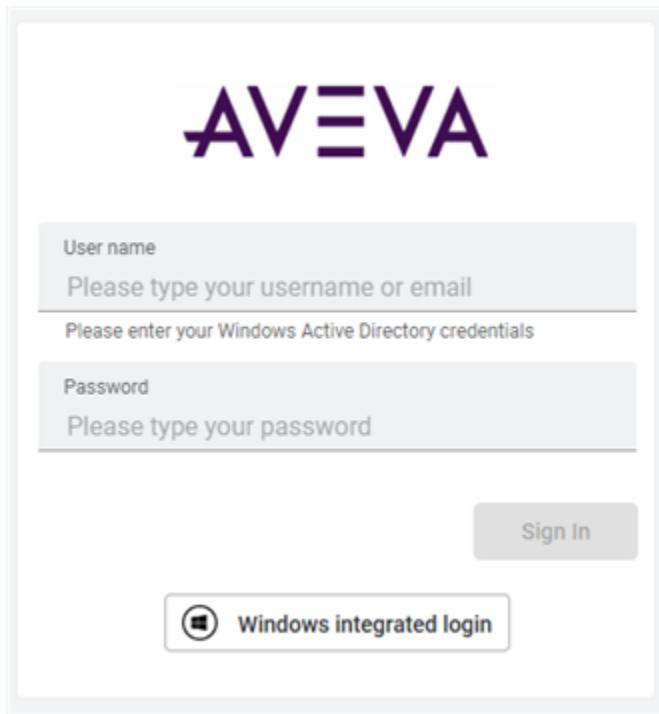
OSM Web 11.2.3 Release Notes

New features

These features are new in AVEVA™ Operational Safety Management 11.2.3 web application.

Sign in to web application with email

It's now possible to sign in to OSM web application with either Windows Active Directory username (domain\username) or email address.



Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.

Log entries for deleted read-only references

When you delete a link to read-only reference, there is now a log entry for this action. This has been implemented for following work items: work permit, isolation plan, isolation list, risk assessment, safe job analysis, and supplementary form. OSM only makes a log entry if the work item is in a non-editable state (such as after approval). Before approval, there is no log entry.

For more information, see [Manage references for work permits](#).

Deprecated features in OSM Web Application

Functionality is marked as deprecated when a feature is still supported in the current release, but might be removed in a future release. We advise that you phase these features out of your projects and begin to use alternative features.

- None

Discontinued features in OSM Web Application

Discontinued features have been removed from the product.

- The setting named *Limit content in some fields for an SJA according to selected work permits* has been removed.

Software fixes in this release

The following software defects have been resolved in AVEVA™ Operational Safety Management 11.2.3.

2864844 - Attachment could not be added to Lesson Learned when status was read-only

Adding an attachment to a lesson learned failed if status was read-only. This issue is now fixed.

3065039 - Printout of isolation points with locks did not show correct person

Printout of an isolation list with points did not show correct name of person when a lock was added "On behalf of". This issue has now been resolved.

3187404 - Duplication of a work permit also copied the form attachment from the original work permit

When duplicating a work permit that had an attachment of the work permit form (generated automatically by OSM), then that specific attachment was also incorrectly copied to the new work permit. This issue has now been resolved.

3196798 - Could not delete an isolation list in New status if isolation list had attachments

Attempting to delete an isolation list with attachments from an isolation plan caused an error and failure to delete isolation list. This issue has now been resolved.

3198471 - Duplication of work permit had wrong "Valid to" date

Duplication of a work permit did not use the correct value in "Number of periods" field when calculating the "Valid to" date—which resulted in an incorrect "Valid to" date. This issue has now been resolved.

3609429 - Printing work permit form with deleted references

Printout of work permit form was displaying an isolation list number, even if isolation list was deleted. This was occurring when deleting the last isolation list reference on a work permit. This issue has now been resolved.

3612581 - When adding a work permit the "Valid to" field was populated with wrong date

When a work permit type had different values in the "Number of periods" and "Maximum periods" fields, this caused the "Valid to" field to not show the correct date. This occurred when adding a new work permit. This issue has now been resolved.

3645965 - Printout of schematics showed toolbar

In the printout of a schematic, the toolbar for annotation was showing and under certain circumstances, the toolbar was obscuring some information. This issue has now been resolved.

Known issues in this release

This release of AVEVA™ Operational Safety Management contains the following known issues. Whenever possible, we will provide a workaround.

1726488 - Job schedules and Daylight Savings Time (DST)

When the OSM database resides in a region with Daylight Savings Time (DST), the job schedule times may not reflect the current DST time. This applies to jobs that are run frequently (multiple times per day) on an hourly or

minute interval. Although database jobs are still running on schedule, the time values for *Last run* and *Next schedule* may appear incorrect.

Workaround: Restart the jobs after a change in DST.

Applies to OSM versions: 11.2, 11.2.1, 11.2.2, 11.2.3

1727562 - Schematics cannot contain negative coordinates

Schematics do not allow negative coordinates. This is a requirement built into the system and a current limitation.

Work around: None

Applies to OSM versions: 11.1, 11.2, 11.2.1, 11.2.2, 11.2.3

3620549 - Adding isolation point and reordering

When a user adds a new isolation point, and then reorders the sequence of the points before saving, this will lead to an error message.

When a user adds a new isolation point, and then deletes a different point before saving the first point, this will also lead to an error message.

Workaround: Do not reorder isolation points or delete an isolation point when new points are added, before saving the newly-added point.

Applies to OSM Versions: 11.2.3

3627816 - Printing more than 25 schematics for an isolation list

If a user wants to print all schematics on an isolation list and the number of schematics is more than 25, a user message is displayed informing that maximum number of schematics that can be printed is 25.

Workaround: Print each schematics individually using the print icon on the schematic card in the left panel.

Applies to OSM Versions: 11.2.3

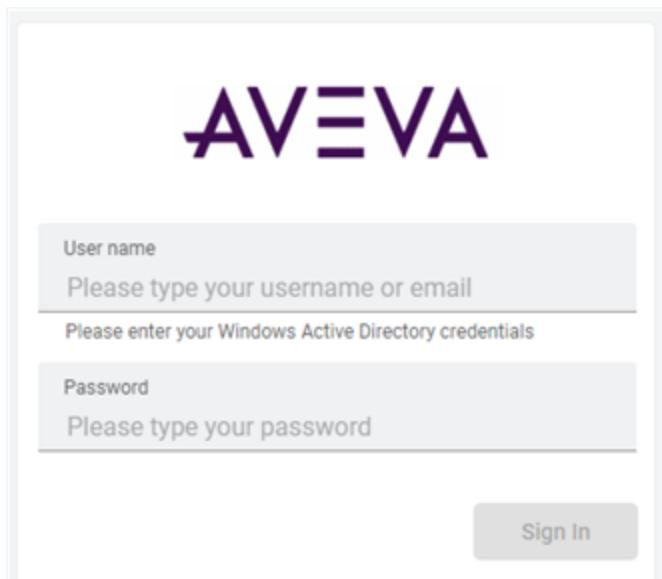
OSM Mobile 3.0 Release Notes

New features

These features are new in AVEVA™ Operational Safety Management Mobile 3.0 application.

Sign in to mobile application with email

It's now possible to sign in to OSM mobile application with either Windows Active Directory username (domain\username) or email address.



Isolation Lists

- Search for and look at details of an isolation list.
- Add isolation lists to your My work list.
- Process the workflow of an isolation list.
- Add and view attachments.
- Work with isolation points, such as:
 - View and add signatures for a point
 - View and change comments
 - View and change locks
 - View and change the state of isolation points

Software fixes

The following software defects have been resolved in AVEVA™ Operational Safety Management Mobile 3.0.

None.

Known issues

This release of AVEVA™ Operational Safety Management Mobile contains the following known issues. Whenever possible, we will provide a workaround.

3651614 - List of "Equipment to be isolated" appears in duplicate

When a user performs a workflow for an isolation list, occasionally the list of "Equipment to be isolated" can be appear duplicated. This is just a visual error.

Workaround: To see the correct list, refresh the isolation list.

Applies to OSM Mobile Versions: 3.0

2023 Releases

OSM Web 11.2.2 Release Notes

These features are new in AVEVA™ Operational Safety Management 11.2.2 web application.

Operational Safety Management Mobile 2.0

With [OSM Mobile 2.0](#), you can access most of the same work permit information that exists in the OSM web application from your mobile device.

- Search for and look at details of a work permit.
- Add work permits to your My work list.
- Process the workflow of a work permit.
- Add and view attachments.

PDF attachments of work permit forms

The mobile app does not display the work permit form. However, there is a way to view the work permit form when it is an attachment to the work permit. This is the only way to view the work permit form in the mobile app.

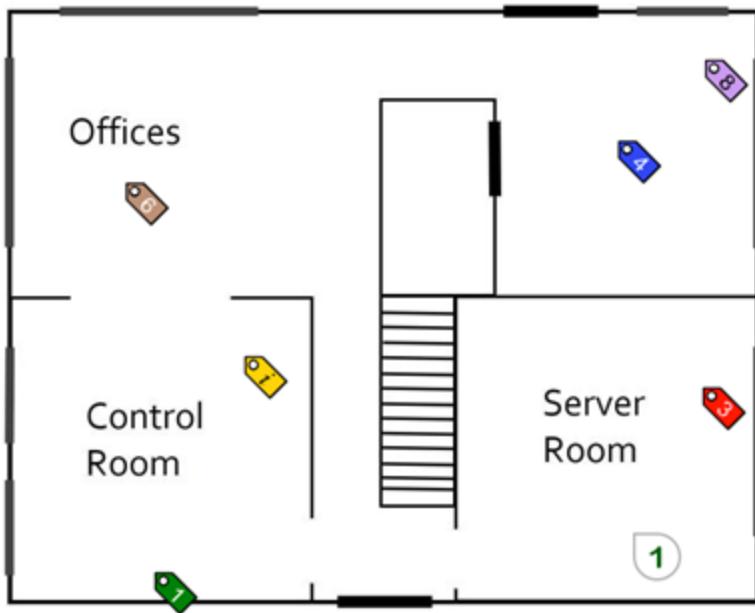
There is a new feature to automatically create a PDF of the work permit form and attach to the work permit. Depending on configuration, this can happen when workflow action is performed.

Dates will automatically copy from work order to isolation plans

There is a new feature for copying dates from work orders to associated isolation plans. If configured, work order dates will be automatically copied into the isolation plans that are associated with a work order.

Info point types on plot plans

Info points on plot plans now have a mandatory info point **type** and associated **icon** from the supplied icon library. Each icon has a predefined color and displays a number.



Unsupported file types for attachments

MSI and EXE file types are not supported as attachments.

Signature pen icon

The icons for the signature pen have changed. The icons display on both the work permit library page and the work permit details page [information header](#).

- The green pen indicates that all required signatures have been added.
- The crossed-out yellow pen indicates that signing process has started, but is not complete.

STATUS	NUMBER
For approval	WP-741901
Approved	WP-741820
New	WP-741782

Deprecated features in OSM Web Application

Functionality is marked as deprecated when a feature is still supported in the current release, but might be removed in a future release. We advise that you phase these features out of your projects and begin to use alternative features.

- None

Discontinued features in OSM Web Application

Discontinued features have been removed from the product.

- HTTP is no longer a supported protocol.

OSM Web 11.2.1 Release Notes

New features in OSM web application

These features are new in AVEVA™ Operational Safety Management 11.2.1 web application.

AVEVA™ Identity Manager for authentication

AVEVA™ Operational Safety Management now uses only AVEVA™ Identity Manager for authentication, which requires you to enter your Windows credentials.

Note: It's no longer possible to enter an e-mail address or OSM user account for authentication.

See [Sign in to Operational Safety Management](#).

Maximum number of periods

The Work Permit Create page has a new maximum limit value on **Number of periods** that a work permit is valid for. The maximum number is independent from the default number of periods. For example, the default number may be 7 periods, but the maximum number is 14 periods.

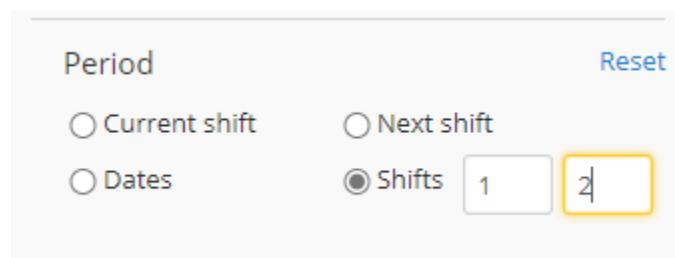
See [Fields on Create New Work Permit page](#).

Work Permit search for shifts

There is a new option in the Work Permits search panel when searching for shifts. It is now possible to isolate which future shifts to query.

Enter numeric values in the **From** and **To** fields. Values can be from 1 to 28, where 28 is 14 days work length.

See [Work permit search parameters](#).



The screenshot shows a search interface for work permits. At the top right is a 'Reset' button. Below it are two radio buttons: 'Current shift' and 'Next shift', both of which are unselected. Further down are two radio buttons: 'Dates' and 'Shifts', with 'Shifts' being selected. To the right of these buttons are two input fields, each containing the number '1'. A yellow box highlights the second input field, which contains the number '2'.

View Plot Plan view

We have repositioned the work permit yellow note in View Plot Plan in both Normal view and Spread view so that the note appears off to the side of the view and does not cover the plot plan.

On behalf of for system locks and personal locks

[System locks](#) and [Add personal locks to isolation points](#) on isolation points now have added the ability to sign *on behalf of* another user.

The screenshot shows a dialog box titled "70CRU30C-B273 - Add system lock". At the top right is a close button (X). Below the title is a field labeled "Lock number *". Inside the field, the value "S52" is entered. Below this field is a yellow box containing the text "Allowed characters: A-Z / 0-9 / _ / - / .". Underneath the input fields is a section labeled "ON BEHALF OF" with a search bar and a dropdown arrow. At the bottom of the dialog are two buttons: a blue "Add" button and a white "Cancel" button.

Support for Portuguese-Brazilian

We have added Portuguese-Brazilian as a supported language.

Deprecated features in OSM Web Application

Functionality is marked as deprecated when a feature is still supported in the current release, but might be removed in a future release. We advise that you phase these features out of your projects and begin to use alternative features.

- None

Discontinued features in OSM Web Application

Discontinued features have been removed from the product.

- HTTP is no longer a supported protocol.

2022 Releases

OSM Web 11.2 Release Notes

What's new in AVEVA™ Operational Safety Management 11.2 web application.

New Features

AVEVA™ Identity Manager for authentication

We have introduced AVEVA™ Identity Manager for client authentication. In response to cybersecurity issues in today's networked world, it was necessary to integrate an identity manager. Sign in through AVEVA Identity Manager requires a user to enter Windows credentials or an OSM user name.

Identity Manager is only for web application authentication. See [Sign in to Operational Safety Management](#).

Enhancements to the Isolations module

The Isolations module underwent a major technical upgrade.

- We made changes to [Isolation lists](#) and how they work. We added a new Isolation list type that is based on either a *mechanical* template or an *electrical* template.
- P&ID have been renamed to schematics.
- Electrical list types can now have schematics.

The screenshot shows the 'Schematics' module interface. At the top, there is a search bar labeled 'Search for schematics (min. 3 chars.)' with a magnifying glass icon. Below the search bar, there are two list items, each represented by a thumbnail icon and a card:

- 23380E-KVEST-001-P-XB-21-00006.001**
Isolation points: Z1
Tags: 34 tags
- 23380E-KVEST-190-P-XB-21-00003.001**
Isolation points: Z5
Tags: 47 tags

Dynamic Functionality

The new Dynamic Functionality feature offers great flexibility in configuring how different Isolation types work. Columns in isolation lists will appear and work as configured for your business needs.

#	NAME	POSITIONS	ISOLATED	VERIFIED ISOLATED	RESET	VERIFIED RESET	TEST	COMMENTS
1	80EG001A	SP MP <input checked="" type="checkbox"/>	Open Open					Thor Arnold
2	83FO5212	SP MP <input checked="" type="checkbox"/>	Open Open					
3	80GK101A-Q07	SP MP <input checked="" type="checkbox"/>	Open Closed					
4	80IC001B	SP MP <input checked="" type="checkbox"/>	Open Open					

User interface enhancements in Isolations module

These are some of the user interface enhancements to [Isolation lists](#) and [Isolation points](#).

Overview tab

- New [Overview tab](#) – Displays as first tab and gives the ability to change description and shows Equipment cards. You can change card selections on this tab.

Equipment isolated by this list
(The isolation contains all the equipment to be isolated)

<input checked="" type="checkbox"/> 13AT1415-MA 	<input type="checkbox"/> 13AT2015-MA
Not found in any schematics	

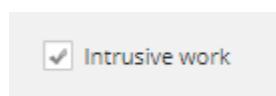
Create new isolation list

- A dropdown menu now shows all created custom Isolation types.

Type *	Mechanical
Code	Name
ELEC	Electrical
MECH	Mechanical
PAGE 1 OF 1	

- You can now select equipment to be isolated from displayed cards. See [Create an isolation list](#).
- The isolation list has a new **Intrusive work** checkbox. Intrusive work is classified as any work that disturbs the

production in a site.



Search for tags

Search functionality has moved inside the *Add isolation point* dialog box. See [Add Isolation Points to isolation list](#).

The screenshot shows the 'Add isolation point' dialog box. At the top, there is a search bar with the number '2' and the tag '86r'. Below the search bar is a table with three columns: 'Name', 'Description', and 'Status'. The first row in the table is highlighted with a yellow background and contains the text '86RY5005', 'AVERAGE WIND SPEED', and 'Active'. The second row contains the text '86r', 'AVERAGE WIND SPEED', and 'Active'. At the bottom of the table, there is a page navigation bar with the text 'PAGE 1 OF 1'. Below the table are two buttons: 'Add' (blue) and 'Cancel' (gray).

Tag cards

You can delete tags and add new tags. You also have the ability to change a searched tag to a manual freetext tag.

The screenshot shows a tag card for tag number 1, labeled '80IC001B' and 'TURBINE CONTROL PANEL'. To the right of the tag name is a small trash can icon used for deletion.

Comments

- Comments have moved. They now appear in the Isolation Point list as Comments functionality. See [Edit comments on isolation points](#).

Search panel

The Isolations search panel has been improved.

Isolation Points List

We made a few changes to the appearance and function of the Isolation Points list.

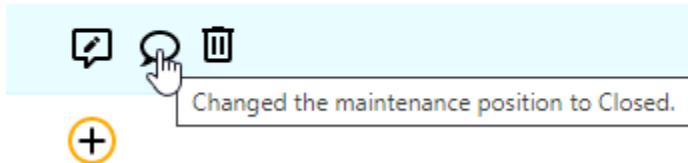
- You can now drag and drop to reorder Isolation points.
- The names of some columns have changed. For example, the *Setting* column has changed to *Isolated*.
- There is a new **Delete** icon to delete signatures.

ISOLATED

	25/06/21 11:22
	25/06/21 11:25 Thor Arnold

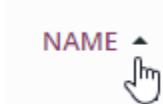
- There is a new [Edit comments on isolation points](#) functionality in the list.

COMMENTS



Sort Isolation points

It is now possible to sort on many of the column headers in the list of isolation points. When you click the column header, a small arrow appears next to the header. See [Sort isolation points](#).



Change Maintenance Position

The term *Proposed Maintenance Position* has been changed to *New Maintenance Position*. See [Change maintenance position on points](#).

#	NAME	POSITIONS
1	80EG001A	SP Open MP Open NMP Closed  
2	83FO5212	SP Open MP Open 
3	80GK101A-Q07	SP Open MP Closed 

System Locks

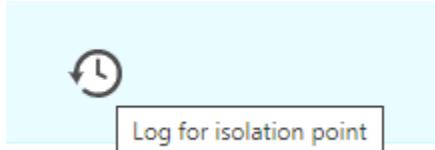
We made some changes to System Locks and Personal Locks.

- Add system locks to isolation points
- Add personal locks to isolation points

LOCK NUMBER
   B12
   A6
  Personal lock
  System lock
  Personal lock

Log for Isolation Point

There is a new log on isolation points to view the history of changes to the point.



Isolation point label printing

The ability to print Isolation Labels is now determined by a dynamic functionality. By default, the functionality to print labels is set to off. Isolation Point labels can only be printed if a template has been uploaded.

Printing Isolation schematics

It is now possible to print all schematics for an Isolation list at one time, instead of printing the schematics individually. This feature is determined by a dynamic functionality.

Work Permit module

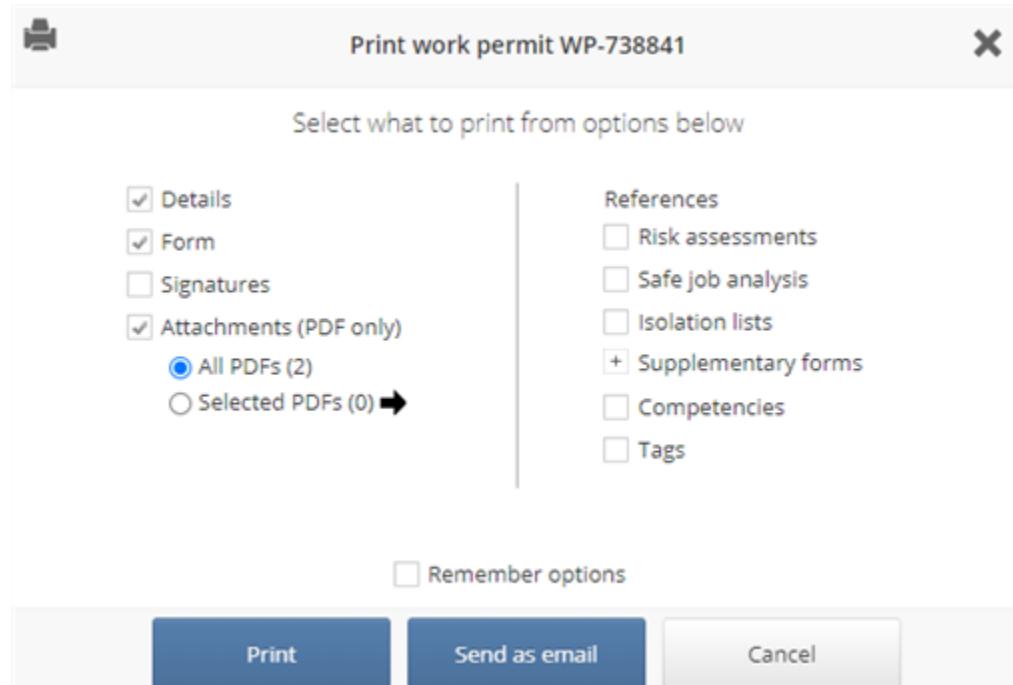
Work Permit Monitoring tab

The criteria for which work permits display in the [Monitoring](#) tab for current shift has changed. Previously, work permits that were scheduled with a valid date for current shift would display in the Monitoring tab. In version 11.2, this has changed so that work permit status must also match one of the configured statuses.

All Modules

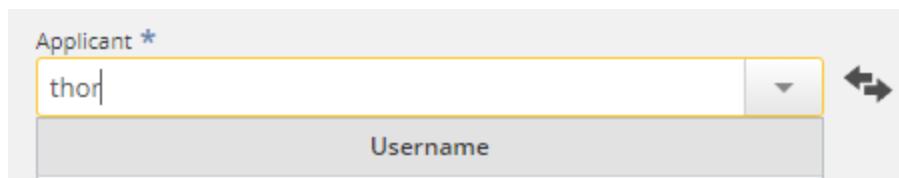
Select which attachments to print when printing work items

When printing a work item, you are given the option to select which attachments to print, instead of printing all attachments. See [Print work permits](#).



Search for User functionality

We have added search functionality to drop down lists where you have to choose a user. You no longer need to advance through multiple pages to find the user.



Searching for work permits shows Valid from and Valid to dates

When searching for work permits in a reference tab, the drop down list now shows the two fields *Valid from* and *Valid to*.

Number	Status	Title	Type	Area	Discipline	Valid from	Valid to	Created by
WP-741062	Approved	New work permit	12HRCEN	Turbine F...		26/11/21	26/11/21	John Doe
WP-741063	On hold	Another new work permit	12HRCEN	Turbine F...		24/11/21	24/11/21	John Doe

Support for Spanish (Mexican) language

- We have added Spanish (Mexican) as a supported language.

Changes to installation requirements

There are the following changes to installation requirements.

- Oracle 19c required
- .NET 4.8 required
- Connection to AVEVA™ Identity Manager Server is required

Deprecated features in OSM Web Application

Functionality is marked as deprecated when a feature is still supported in the current release, but might be removed in a future release. We advise that you phase these features out of your projects and begin to use alternative features.

- None

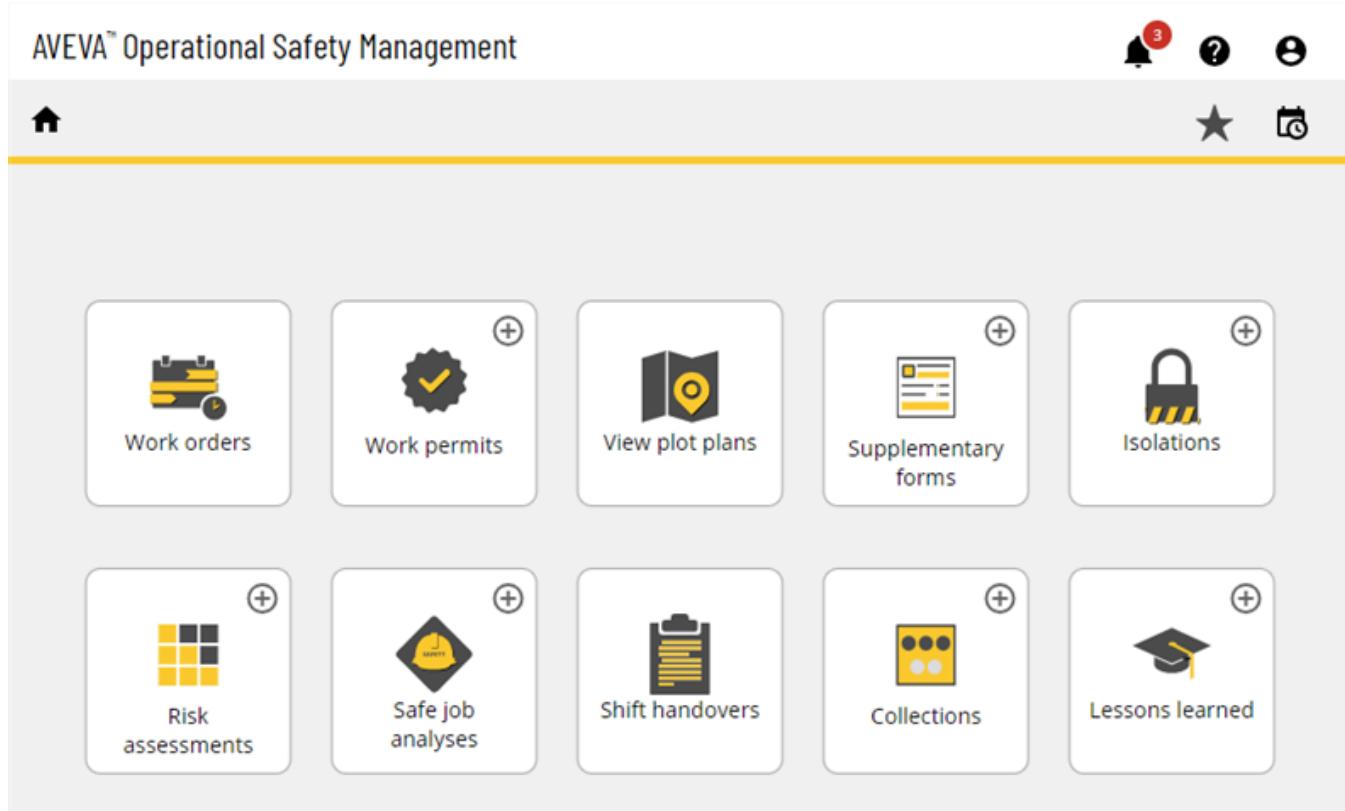
Discontinued features in OSM Web Application

Discontinued features have been removed from the product.

- Internet Explorer is no longer a supported browser.

Introduction

- [Sign in to Operational Safety Management](#)
- [OSM Home page](#)
- [Settings](#)



Sign in to Operational Safety Management

AVEVA™ Identity Manager for authentication

AVEVA™ Operational Safety Management now uses only AVEVA™ Identity Manager for authentication, which requires you to enter your Windows Active Directory credentials.

Note: It's no longer possible to enter an OSM user account for authentication.

Windows domain authentication

A Windows domain authentication will be validated against Windows Active Directory.

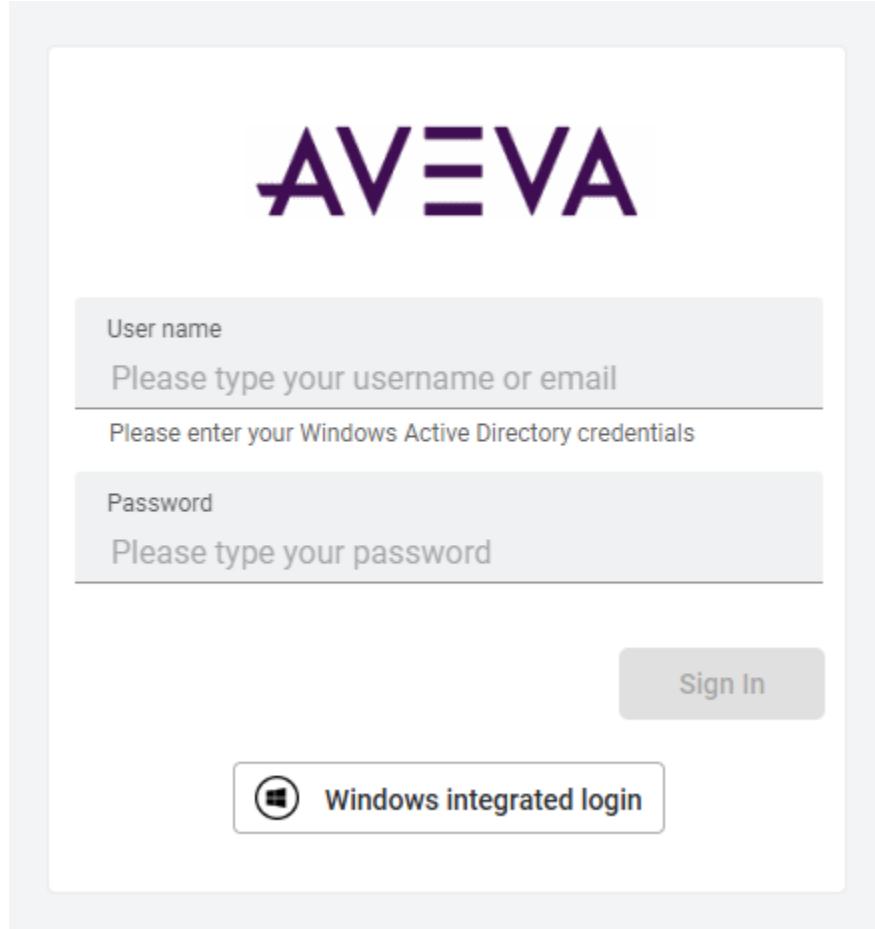
- domain\username or email address
- domain password

Sign in to OSM Web application

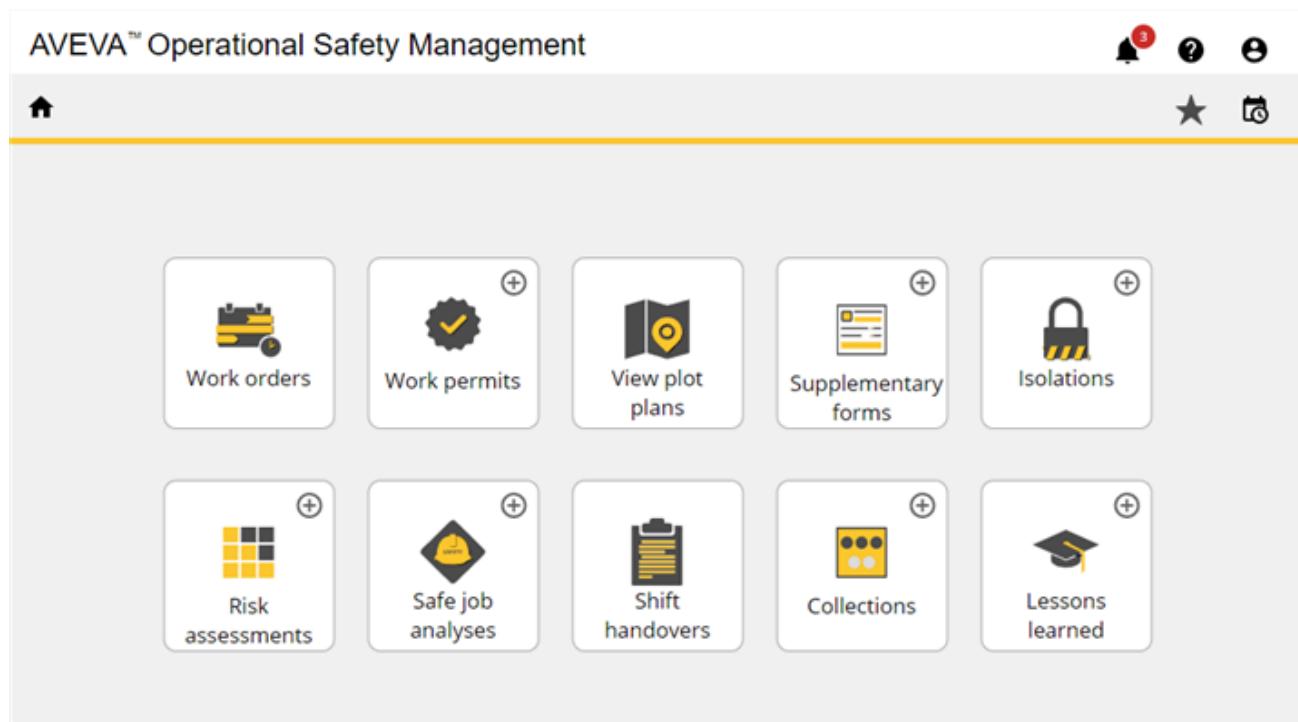
1. Open a browser window and enter the OSM Web application URL.
For example: *http://machine.company.com/sitename*
2. Click **Sign in**.



3. In the AVEVA™ Identity Manager sign-in box, enter your Windows Active Directory credentials, then click **Sign In**.
-or-
Click the **Windows Integrated Login** button on the AVEVA™ Identity Manager sign-in box. This function picks up the Windows user credentials that are currently signed in to the computer.



The [OSM Home page](#) displays.



Automatic sign out

If the web client has been idle for 20 minutes or longer, you will be [Automatically Signed out](#).

Automatic Sign out

Automatic Sign out

When the web client has been idle for 20 minutes or longer, you may get automatically signed out.

Why have I been signed out?

The default automatic sign out time is 20 minutes of inactivity. Unless you have tab with a refresh page open, you could be signed out.

The *activity timeout* value can be set by your OSM System Administrator.

Pages with automatic refresh

The following pages will stop automatic sign out:

- Work Permit Library if user has turned on automatic refresh of library.
- View Plot Plan if user has turned on automatic refresh of plot plans.

Scenarios

Explanation of scenarios where user will or will not be signed out.

Scenario 1 - Only one tab with a refresh page

User opens OSM Web Application in a browser with only one (1) tab containing an OSM page.

- Page supports automatically refresh.
- User *will not* be automatically signed out.
- Example: Work Permit Library page

Scenario 2 - Only one tab with a non-refresh page

User opens OSM Web Application in a browser with only one (1) tab containing an OSM page.

- Page does not support refresh.
- User *will be* automatically signed out according to *activity timeout* value set in OSM Administration.
- Example: Supplementary Library page or Work Permit Details page.

Scenario 3 - Several tabs with one refresh page

User opens OSM Web Application in a browser with several tabs all containing OSM pages.

- One of the tabs has a page that supports automatically refresh. The page does not need to be the active tab (tab with focus).
- User *will not* be automatically signed out.
- Example: Four (4) tabs with following pages:
 - Work Permit Details page
 - View Plot Plan page
 - Supplementary Form Library page
 - SJA Details page

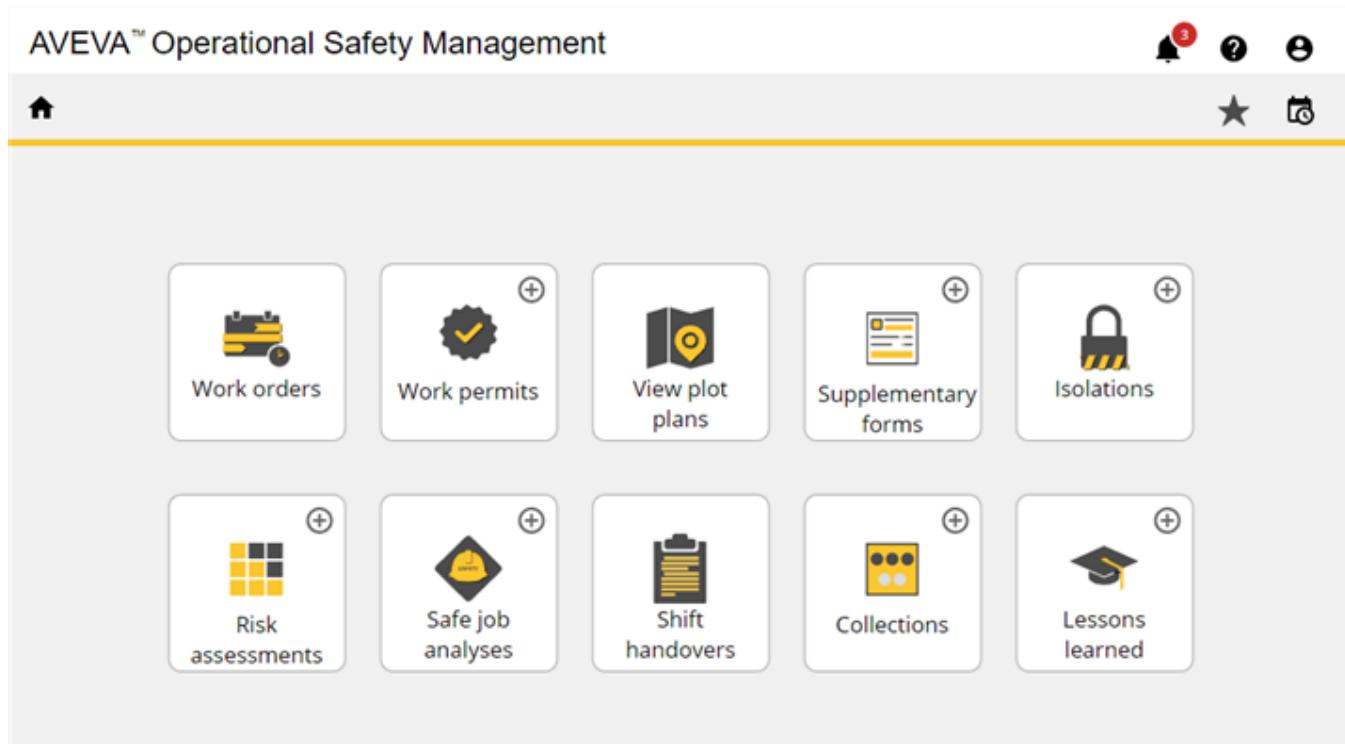
Scenario 4 - Several tabs with only non-refresh pages

User opens OSM Web Application in a browser with several tabs all containing OSM pages.

- None of the pages support refresh.
- User *will be* automatically signed out from all tabs according to *activity timeout* value set in OSM Administration.
- Example: Four (4) tabs with following pages:
 - Work Permit Details page
 - Work Order Library page
 - Supplementary Form Library page
 - SJA Details page

OSM Home page

When you have [signed in](#) successfully, you will be presented with the OSM Home page.



Operational Safety Management modules

The Home page gives you access to the following module tiles.

- [Work Orders](#)
- [Work Permits](#)
- [Risk Assessments](#)
- [Isolations](#)
- [Collections](#)
- [Safe Job Analyses](#)
- [Lessons Learned](#)
- [Plot Plans](#)
- [Shift Handover](#)

Features

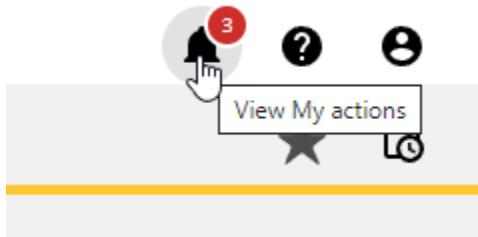
From the Home page, you can access the following features.

- [My Actions](#)
- [My Work](#)
- [Browse History](#)
- [Settings](#)
- [About Screen](#)

My Actions

Your Action items

In the upper-right corner of the [OSM Home page](#) there are some icons, including icons for **My actions** and **My Work**.



My Actions panel

The **My Actions** panel displays all items that are awaiting action by the currently logged in user. When there are any waiting actions, a red circle displays the number of waiting items.

The panel quickly summarizes needed actions for the current user. You can search and also remove items from the list.

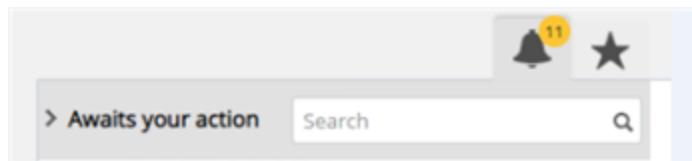
A screenshot of the 'Action items' section of the OSM web interface. At the top, there is a search bar with the placeholder 'Search'. To the left of the search bar is a 'Home' icon. On the right side of the search bar are icons for a bell (with a red '3' notification), a question mark, and a user profile. Below the search bar is a table listing three items: 'SPF0004946 Approve', 'SPF0004947 Approve', and 'SJA-034038 Reset to New'. To the left of the table is a grid of eight cards representing different actions: 'Work orders', 'Work permits', 'View plot plans', 'Supplemental forms', 'Risk assessments', 'Safe job analyses', 'Shift handovers', and 'Collections'. Each card has a plus sign icon in the top right corner.

My Work

My Work panel

In the upper-right corner of the [OSM Home page](#) there are icons for **My Actions** and **My Work** .

Your **My Work** list contains any items that you add for quick access.



Add an item to My Work

- On a Library page, click next to an item to add the item to **My Work**. When added, the star icon will change to .

Remove an item from My Work

- Click to remove the item from My Work.

ID	Status	Type	Action
IP-053680 20VA001	New	EG	X
IP-053424 Mechanical Isolation Plan	Active	EG	X
IP-053390 TabTest1	Approved	EG	X
IP-053353 PID from VAL	New	VAL	X
IP-053352 PID from EG	New	EG	X
IP-052794 TestPlan	Approved	EG	X
IP-052670 AVEVA TEST	New	EG	X
IP-052574 Test Progvalue prevent	Approved	EG	X
IP-052556 BP ISOLATION DEMO	Approved	EG	X
IP-052386 TEST WRONG PID TAG	New	EG	X
IL-052369 Maint pos 1	Reset in execution	EG	X
IL-052083 20VA001	New	EG	X
IL-051772 Mechanical Isolation List	Active	EG	X
IL-051713 PID from VAL	New	VAL	X

My Work panel from the Home page

The Home page My Work panel contains My Work items from all entities – work order, work permit, isolation plan, lessons learned, and safe job analysis.

You can click any item in the list to be directly navigated to the relevant item details page.
You can search and also remove items from the list.

My Work tab on a Library page

You can add any entity to My Work tab for a library.

All the items that are added to My Work will display on the My Work tab on Library page.

Note: If a module is disabled, then all My Work references to the disabled module will be automatically removed.

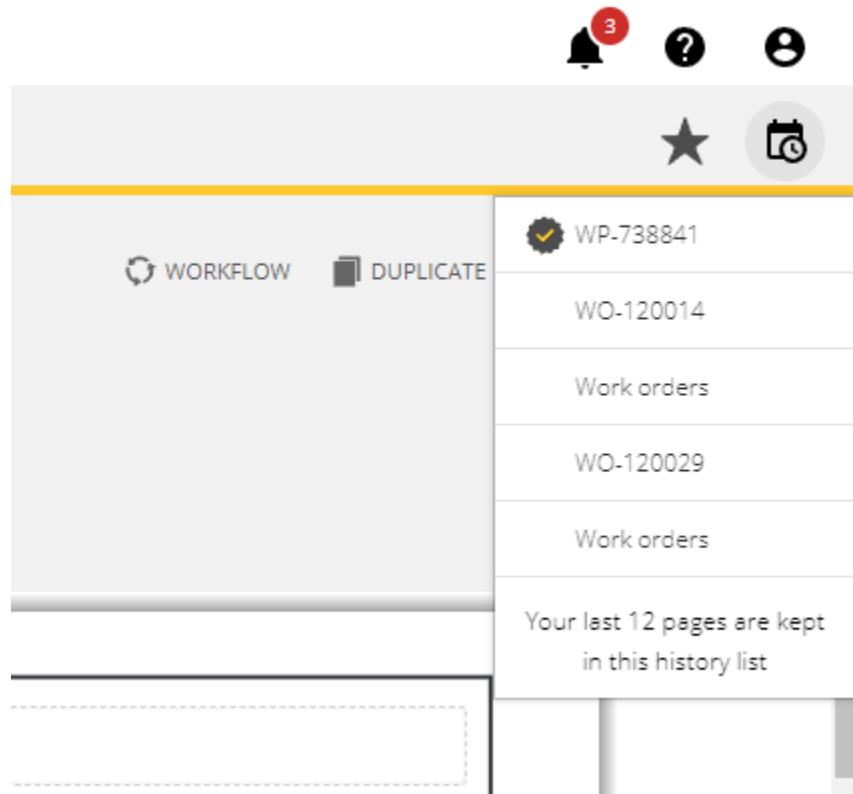
Browse History

The upper-left corner of the [OSM Home page](#) shows an arrow icon for navigating your browse history.

History List

You can browse a history list of last 12 entities that you visited.

You can go to any of these entities by clicking the history link. This history is per entity and not per page.



Disabled modules

It is now possible to enable and disable individual modules in Operational Safety Management. When one or more modules has been disabled, the tiles on the Home page of Operational Safety Management will

dynamically rearrange.

Note: Enabling and disabling modules can only be done by an administrator.

Guidelines

When a module is disabled, you will no longer be able to perform operations against that module.

- When a module is disabled, it is not possible to duplicate any entities in that module. The duplication button will not be there.
- When a module is disabled, it will not be possible to create objects for the disabled module. For example, if the Risk Assessment module is disabled, it will be still visible in other pages, but it will not be possible to create a new risk assessment.
- Duplication of entities that belong to enabled modules will not contain any references to entities that belong to disabled modules. The Duplication form will still contain options to duplicate disabled modules (entities), but existing disabled modules (entities) will not be copied. For example, duplicating of an old work permit with reference to disabled modules, will not duplicate any disabled entities, so that the new work permit contains only references to entities that belong to modules that are enabled.
- When a module is disabled, the corresponding libraries will appear empty, so that user cannot see any lists. If library is accessed by other possibilities except from home page and the module is disabled, then a standard message will appear on the library. No records will be listed in the library.
- When a module is deactivated, the settings for that module on the Settings page will appear inactive. Inactive means that they are visible, but greyed out.
- If a module is disabled, it will not be possible to perform workflow for that entity.
- When a module is disabled, then all My Work references to the disabled module will be automatically removed.

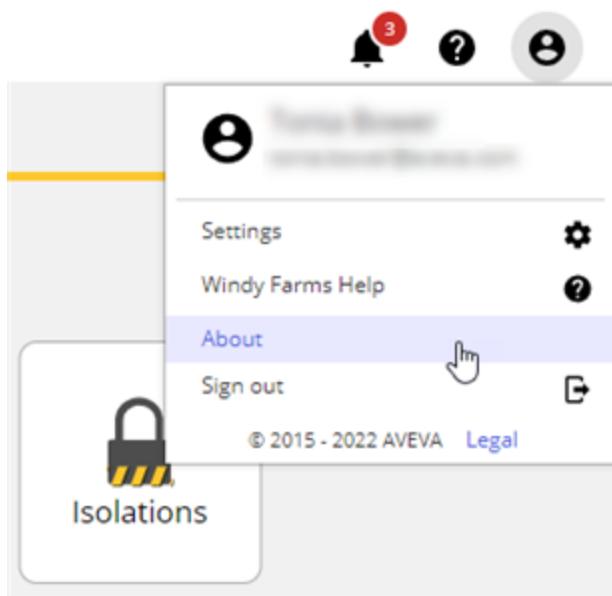
About Screen

In the upper-right corner of the [OSM Home page](#) is your **User profile** icon.



Open the About screen

1. Click the **User profile** icon.
2. On the drop-down menu, click **About**.



The About screen

A screenshot of a modal dialog titled 'About AVEVA Operational Safety Management'. The dialog lists system details:

Environment:	Site1@WindyFarms
Version:	11.2
Build:	b988 (03/02/22)
Database:	Database@WindyFarms
Database version:	11.2.0.0
BizRules:	- / -

At the bottom right of the dialog is a 'Close' button.

Settings

The Settings page contains your user settings for general settings and module settings. These settings apply to your user account only.

- General settings
- Work Permit settings
- Plot Plans settings
- Supplementary forms settings
- Isolation settings

- Risk Assessment settings
- Safe Job Analysis settings
- Collection settings
- Lessons Learned settings

The screenshot shows the 'Settings for Operational Safety Management' window with four tabs:

- General**: Includes fields for Preferred site (WFM1 - Wind Farm 1), Language (English (United Kingdom, stan)), Date format (dd/mm/yy), Number of items in libraries (60), Number of items per page in lists (20), and Number of items per page in drop down menu (10).
- Work permits**: Includes Library (Show all work permits), Automatically add new work permit to My work (No), Refresh interval (Off), and Show options for plot icons.
- Plot plans**: Includes Show options for plot icons (Work permit plot icons checked, Number unchecked), Information points icons (unchecked), All connection lines (checked), Automatic plot plan roll over (Off), Automatic plot area refresh (Off), and Automatic activity feed refresh (Off).
- Supplementary forms**: Includes Library (Show all supplementary form), Automatically add new lessons learned to My work (No), and Show options for plot icons.

Settings page

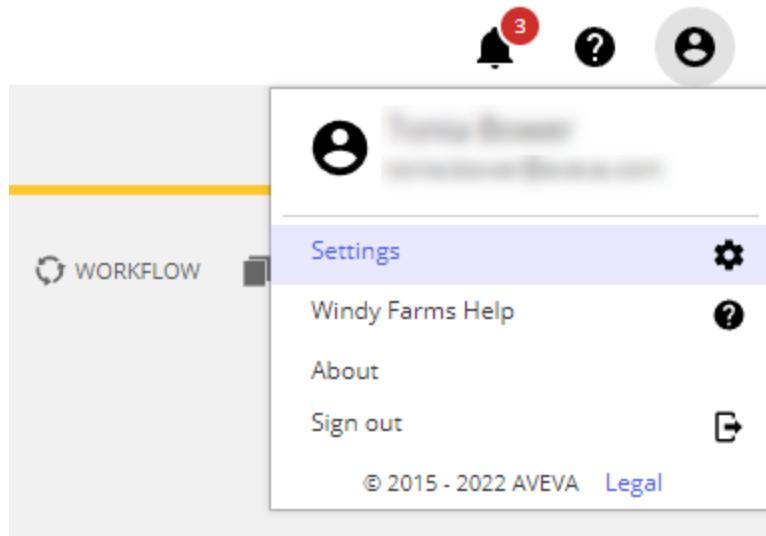
Open the Settings window

In the upper-right corner of the [OSM Home page](#) is your **User profile** icon. You can access **Settings** to configure different settings in the application.



Open Settings window

1. Click the **User profile** icon.
2. On the drop-down menu, click **Settings**. The **Settings** page displays.



General settings

The **General** settings apply to all entities in application, regardless of module.

Preferred site

Language

Date format

Number of items in libraries

Number of items per page in lists

Number of items per page in drop down menu

Number of characters before the search starts

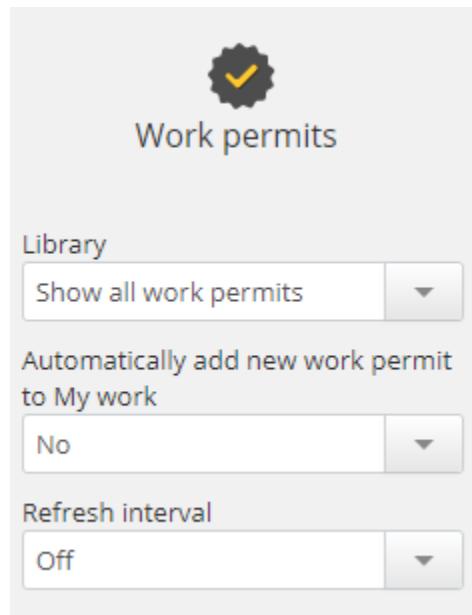
Receive notification for role only "Action items" (work items)

General settings	Description
• Preferred site	You can set your preferred site. This is the default site location (formerly asset) when searching and when creating new entities. After clicking Save changes , you will be returned to the Home Page.
• Language	You can set your preferred language from the available Language options for the OSM application. If you change the display language, after clicking Save changes , you will be returned to the Home Page.
• Date format	Your preferred date format to display in the web application. Note: Printouts for all modules will not use your personal date format, but will use the global date format as configured by administrator.

General settings	Description
• Number of items in libraries	The number of allowed items per library.
• Number of items per page in lists	This setting refers to number of items shown in Library lists. When there are more items available, you will get the option to select the next page with the next list of items.
• Number of items per page in drop down menu	This setting refers to number of items in drop down menus. When there are more items available, you will get the option of selecting the next page with the next list of items.
• Number of characters before the search starts	The number of minimum number of characters to enter before search function can perform. The value can be between 3-99. The value entered here will be visible as minimum characters to enter in all search bars.
• Receive notification for role only Action items (work items)	Select Yes for the system to notify you when a work item is sent to all people in a Role.

Work Permit settings

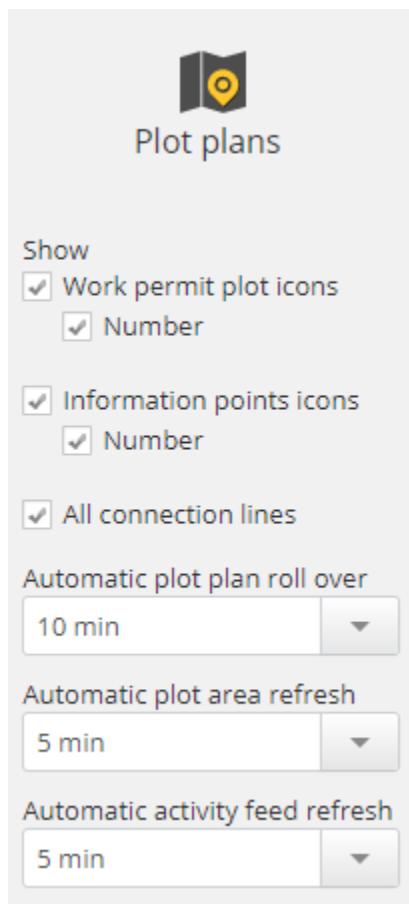
These settings apply to the [Work Permit](#) module.



Work Permit settings	Description
• Library	Select either <i>Show My work</i> or <i>Show all work permits</i> as the default when you open the Work Permit Library.
• Automatically add new work permit to My work	Select Yes to add any new work permit you create to your My Work automatically.
• Refresh interval	All tabs in the Work Permit library will automatically refresh at the rate you set here. You can select <i>Off</i> , <i>1 min</i> , <i>3 min</i> , <i>5 min</i> , <i>10 min</i> .

Plot Plans settings

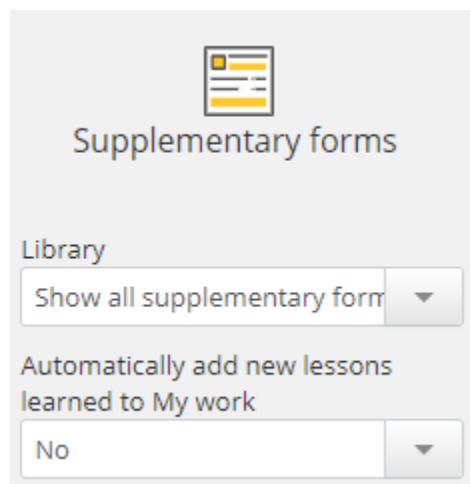
These settings apply to [Plot Plans](#).



Plot Plan settings	Description
<ul style="list-style-type: none"> • Show work permit plot icons 	Enables display of work permit plot icons.
<ul style="list-style-type: none"> • Show number 	Enables display of work permit numbers.
<ul style="list-style-type: none"> • Show information point icons 	Enables display of information point icons.
<ul style="list-style-type: none"> • Show number 	Enables display of information point numbers.
<ul style="list-style-type: none"> • Show all connection lines 	Enables display of connection lines.
<ul style="list-style-type: none"> • Automatic plot plan rollover 	Enables automatic rotation of the plot plans at the rate you set here. You can select <i>Off</i> , <i>1 min</i> , <i>3 min</i> , <i>5 min</i> , <i>10 min</i> .
<ul style="list-style-type: none"> • Automatic plot area refresh 	The plot area will automatically refresh at the rate you set here. You can select <i>Off</i> , <i>1 min</i> , <i>3 min</i> , <i>5 min</i> , <i>10 min</i> .
<ul style="list-style-type: none"> • Automatic activity feed refresh 	The activity feed will automatically refresh at the rate you set here. You can select <i>Off</i> , <i>1 min</i> , <i>3 min</i> , <i>5 min</i> , <i>10 min</i> .

Supplementary forms settings

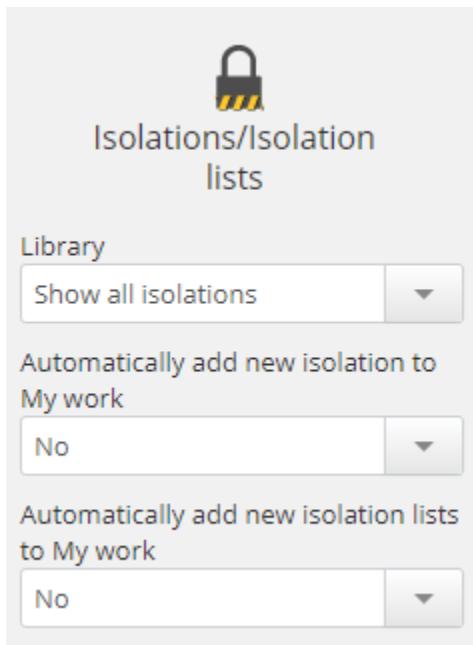
These settings apply to the [Supplementary Forms](#) module.



Supplementary Forms settings	Description
<ul style="list-style-type: none"> • Library 	Select either <i>Show My work</i> or <i>Show all supplementary forms</i> as the default when you open the Supplementary Forms Library.
<ul style="list-style-type: none"> • Automatically add new supplementary forms to My work 	Select Yes to add any new supplementary form you create to your My Work automatically.

Isolation settings

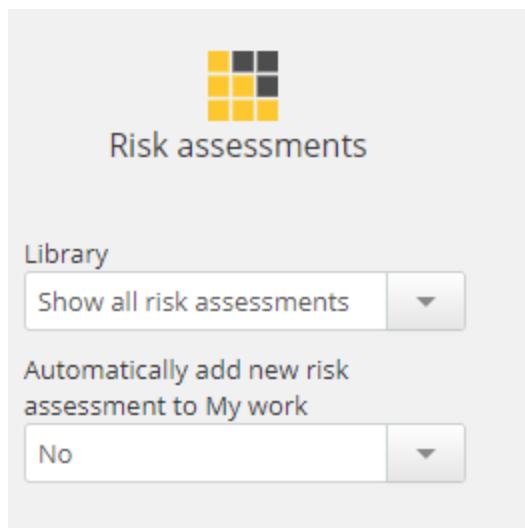
These settings are applicable to the [Isolation](#) module.



Isolation settings	Description
<ul style="list-style-type: none"> • Library 	Select either <i>Show My work</i> or <i>Show all isolations</i> as the default when you open the Isolations Library.
<ul style="list-style-type: none"> • Automatically add new isolation to My work 	Select Yes to add any new Isolation you create to your My Work automatically.
<ul style="list-style-type: none"> • Automatically add new isolation lists to My work 	Select Yes to add any new isolation list you create to your My Work automatically.

Risk Assessment settings

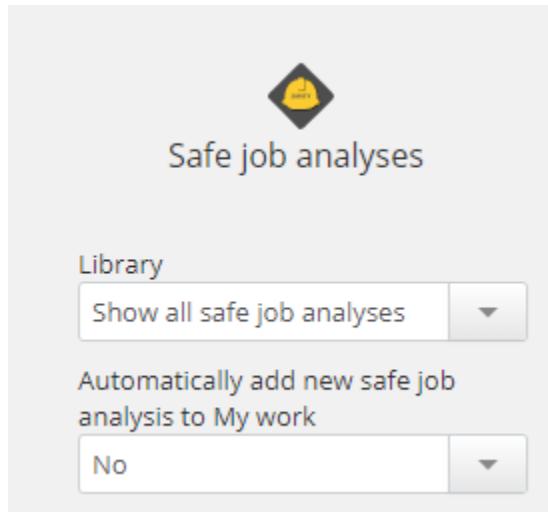
These settings apply to the [Risk Assessment](#) module.



Risk Assessment settings	Description
<ul style="list-style-type: none">• Library	Select either <i>Show My work</i> or <i>Show all risk assessments</i> as the default when you open the Risk Assessment Library.
<ul style="list-style-type: none">• Automatically add new risk assessment to My work	Select Yes to add any new Risk Assessment you create to your <i>My Work</i> automatically.

Safe Job Analysis settings

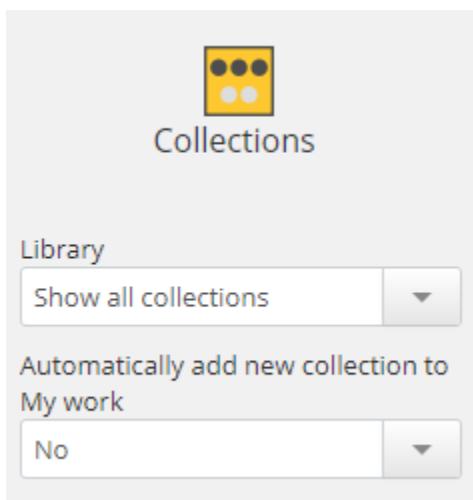
These settings apply to the [Safe Job Analysis](#) module.



Safe Job Analysis settings	Description
<ul style="list-style-type: none"> • Library 	Select either <i>Show My work</i> or <i>Show all safe job analysis</i> as the default when you open the SJA Library.
<ul style="list-style-type: none"> • Automatically add new safe job analysis to My work 	Select <i>Yes</i> to add any new safe job analysis you create to your My Work automatically.

Collection settings

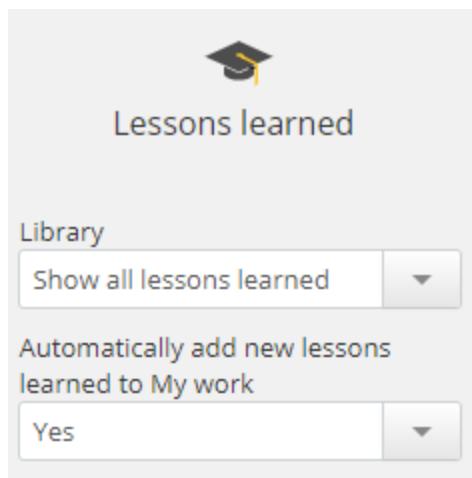
These settings apply to the [Collections](#) module.



Collection settings	Description
<ul style="list-style-type: none"> • Library 	Select either <i>Show My work</i> or <i>Show all collections</i> as the default when you open the Collections Library.
<ul style="list-style-type: none"> • Automatically add new collection to My work 	Select <i>Yes</i> to add any new collection you create to your My Work automatically.

Lessons Learned settings

These settings apply to [Lessons Learned](#) module.



Learned Lesson settings	Description
<ul style="list-style-type: none">• Library	Select either <i>Show My work</i> or <i>Show all lessons learned</i> as the default when you open the Lessons Learned library.
<ul style="list-style-type: none">• Automatically add new lessons learned to My work	Select <i>Yes</i> to add any new Lessons Learned you create to your My Work automatically.

Libraries

A Library in AVEVA™ Operational Safety Management contains all the entities that belong to the same module. For example, the Work Permit library contains all work permits.

Library features

- Library icons
- Signature icons
- Status Indicator icons
- Information header
- Search panel
- Quick filters

Library icons

These icons are common across modules and appear on the Library page.

Icon	Name	Description
	My Work icon	Click the star icon to add the item to My Work .
	Signature icon	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status icon	Indicates the current status of the item.
	Process Workflow icon	Click the Workflow icon to show all the available processes for the current item.

Other icons

- [Signature icons](#)
- [Status Indicator icons](#)
- [Tag criticality](#)

Signature icons

The signature pen icons display on both the work permit library page and the work permit details page.

- The crossed-out yellow pen indicates that signing process has started, but is not complete.
- The green pen indicates that all required signatures have been added.

	STATUS	NUMBER
	For approval	WP-741901
	Approved	WP-741820
	New	WP-741782

Tag criticality

Tag criticality

The color of the tag icon indicates whether the criticality of the main object has been evaluated.

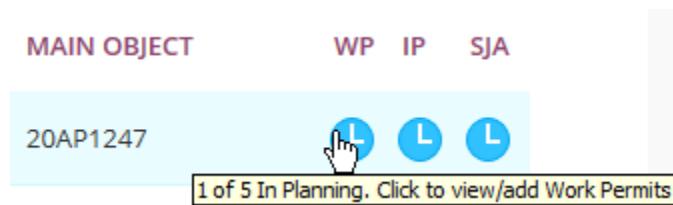
Tag color	Level of criticality
Blue 	Non criticality
Green 	Low criticality
Yellow 	Medium criticality
Red 	High criticality
Red with "S" 	Safety critical element
White 	No criticality, means criticality has not been evaluated

Status Indicator icons

You can get a quick overview of status of entity or entities within, by viewing the status indicator symbols.

Toolips

Hover over the status indicator symbol to see the tooltip.



Status indicator icons

There are seven key phases, shared by all entities, that are identified and will be given the relevant color symbol.

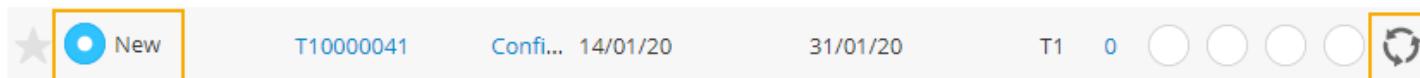
Icon	Phase	Examples of statuses
	New	<i>New</i>
	In planning	<i>For approval</i>
	Approved	<i>Approved, In execution</i>

Icon	Phase	Examples of statuses
	Active	<i>Active, Active extended</i>
	Inactive	<i>On hold, Expired</i>
	Closed/Completed	<i>Completed, Closed</i>
	Canceled	<i>Canceled</i>

Process icon

Click the **Process** icon to process the status of a row and move it to the next status in the defined workflow.

Note: This does not update the status of linked entities, which have an independent status.



Blank Icons

When no status has been defined, it's a blank icon. This is default.



Search panel

Search for an entity

The Library page for each type of entity contains a Search panel.

Open the Search panel

1. Click the icon on right side of the screen. The Search panel expands with different parameters, depending on the type on entity.

>  Search Transfers

Search by number or title ...

Category
Instrumental

Status
 100 - New
 200 - Approved
 800 - Closed

Created between
 hh:mm - hh:mm

Created by
Select user / Search for name

2. Select the search details and click **Search** to search the current tab with the given parameters.

Reset the search query

- Click **Reset** to reset the query values.



Search default filters

The Search panel has a default configuration. If you change this, an icon  appears in the upper-left corner. The added filters are saved for the user and will be used until you click **Reset all filters**.

Area

Enter three characters to search for an Area, or choose an Area from the drop-down list.

Area	
Code	Name
CSE	Control Station East
CSN	Control Station North
CSW	Control Station West
TAE	Turbine Fields East
TAN	Turbine Fields North
TAW	Turbine Fields West
TSE	Transformer Station East
TSN	Transformer Station North
TSW	Transformer Station West

PAGE 1 OF 1

You can choose multiple Areas.

Area	Reset
Search in code and name	
Transformer Station East	
Transformer Station West	

System

Enter three characters to search for the relevant system, or choose a system from the drop-down list.

System

Search in code and name 

Code	Name
CTRL	Control System
ELEC	Electric System
PIPE	Pipe System
SAFE	Safety System
WATR	Water System

◀ PAGE 1 OF 1 ▶

You can choose multiple systems.

System [Reset](#)

Search in code and name 

[Electric System](#)  [Control System](#) 

Discipline

Enter three characters to search for the relevant discipline, or choose a discipline from the drop-down list.

Discipline

Search in code and name 

Code	Name
EL	Electro
IN	Inspection
ME	Mechanical
PI	Piping

◀ PAGE 1 OF 1 ▶

You can choose multiple disciplines.

Discipline [Reset](#)

Search in code and name

[Electro](#) [Inspection](#)

Valid From and Valid To

Select the start date and end date in the date range you are searching for.

Valid from - Valid to

[Reset](#)

Is safe Yes No

ISOLA

Type

Search

March 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Quick filters

The **Quick Filter** tabs provide easy access to entities that have the same specified status. The statuses that display as tabs in AVEVA™ Operational Safety Management Web Application are configured by the administrator for each module.

In this example, the Work Permit module displays Quick Filter tabs for these statuses:

- *New*
- *Approved*
- *Active*

The screenshot shows the 'Work permits' page. At the top, there's a navigation bar with 'BROWSE ALL (37)', 'MY WORK (11)', and 'MONITORING (0)'. Below this is a 'QUICK FILTERS' section with three buttons: 'NEW (14)' (highlighted with a yellow border), 'APPROVED (10)', and 'ACTIVE (11)'. A large table below lists 14 new work permits, each with a checkbox, a star icon, a status icon, a number, type, site, and validity details.

	STATUS	NUMBER	TY	ST	AR	ZO	DI	OG	RE	VALID FROM	VALID TO
<input type="checkbox"/>	New	WP-741741	12HRGEN OPS	TSE	EZONE					08/13/22	08/13/22
<input type="checkbox"/>	New	WP-741740	12HRGEN OPS	TSE	EZONE					08/13/22	08/13/22
<input type="checkbox"/>	New	WP-741642	12HRGEN OPS	TAN	NZO...					06/18/22	06/18/22
<input type="checkbox"/>	New	WP-741620	12HRGEN OPS	TAE	EZONE					06/11/22	06/11/22
<input type="checkbox"/>	New	WP-741462	12HRGEN CRL	TAE	EZONE					04/21/22	04/21/22

Information header

When you click on any item in a Library list, you will be navigated to the details tabs of the item. At the top of the page there is an information header with details about the item. This includes number, title, description, status, site, and other important information for the entity.

Below this header, the details of the entity are distributed on different tabs.

The screenshot shows the information header for item SJA-035359. It includes the item number and title, followed by action buttons for Workflow, Duplicate, Print, and Edit, and a yellow star icon. Below the header, there are several status fields: STATUS (150 - For approval), SITE (UTC+12) (Wind Farm 1), AREA (Not selected), TC (Not selected), TAG (Not selected), SYSTEM (Electric System), DISCIPLINE (Not selected), and RESPONSIBLE FOR SJA (Thor Arnold).

Action buttons on header

The information header contains some possible action buttons.

- **Workflow:** Shows the available processes for the item as per current status. These processes are configurable by the administrator.
- **Duplicate:** The **Duplicate** button creates a copy of an item.
- **Print:** The **Print** button generates a report in PDF format.
- **Edit:** Navigates to the **Edit** page where you can edit the details of the item.
- **My Work:** Adds the item to your **My Work** list.

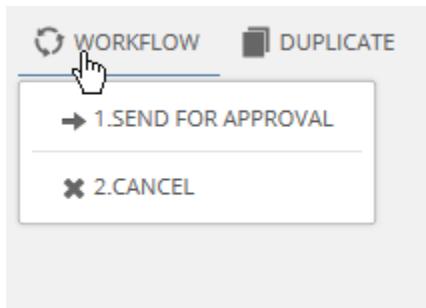


Workflow

Process the entity workflow

Each entity features a **Workflow** button on the details page. The Workflow button enables you to process the entity.

If you click on any workflow, all the available processes for the current entity in current status will be shown.



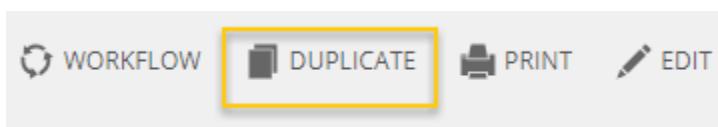
Workflow icons

→	The forward arrow represents forward process.
←	The backward arrow represents backward process.
暂停图标	The pause icon represents hold process.
✗	The cancel icon represents canceling process.

For more information on processing workflow, see [Processing a Workflow](#).

Duplicate

The **Duplicate** button will make a copy of that entity where the purpose is to reuse what has been added.



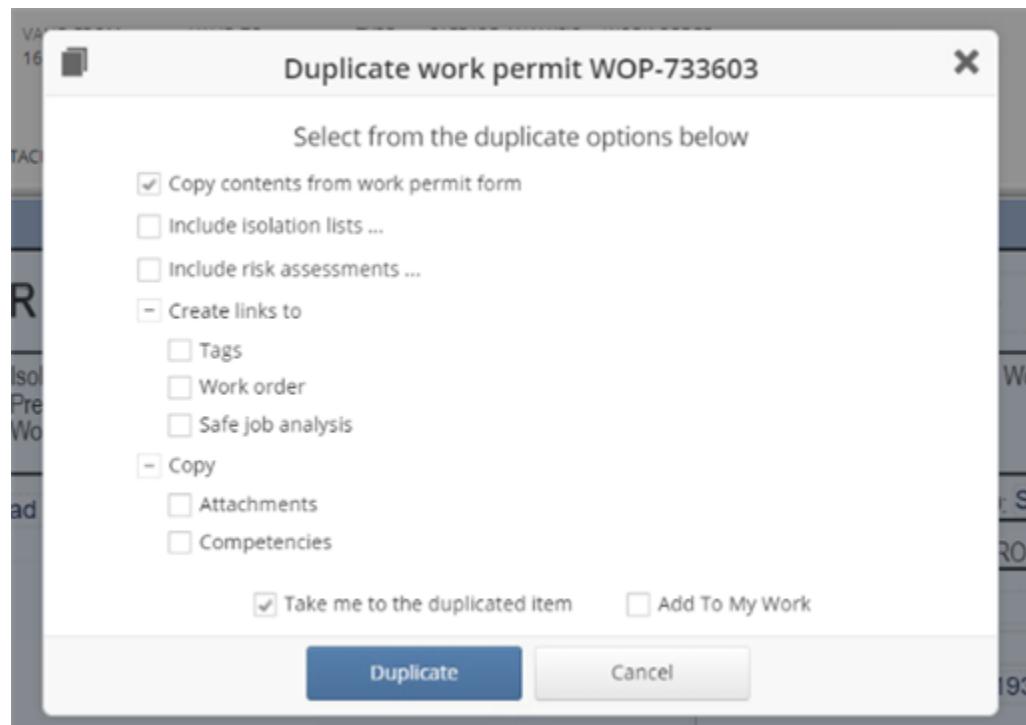
Duplicate an item

1. Select an item.
2. Click **Duplicate**.

Linked objects

For a work permit, safe job analysis, isolation plan, and isolation list, you can specify which linked objects should be duplicated and which references should be copied.

- Duplicate a work permit
- Duplicate a safe job analysis
- Duplicate an isolation plan
- Duplicate an isolation list



Print

Print an entity

The **Print** button generates a report in PDF format.



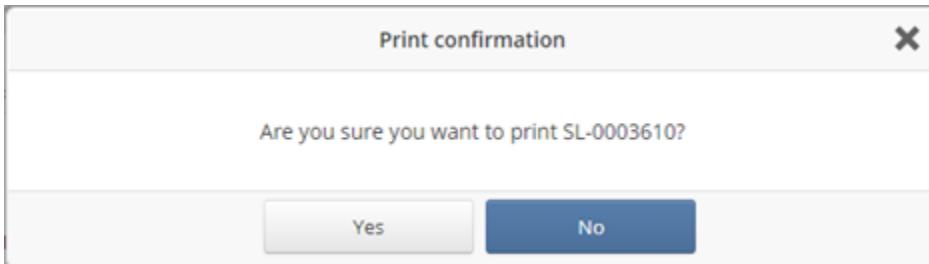
1. Click the **Print** icon next to the relevant item. A default report will be generated.

SL-0003610 25/09/2018 07:00 - 19:00

Date: 25/09/2018 Time: 18:29 Type: Type Value: Select or search by code/nan

PRINT

2. You will be prompted to confirm that you want to generate a printout. Click **Yes**.



A default report is then generated and displays as a PDF in the browser.

Shift Handover						Category	Printed
#	REPORTED	TYPE	VALUE	DESCRIPTION			
1	✓ 25/09/2018 17:54	Discipline	I	Pump A	is having a leakage		
2	✓ 25/09/2018 07:00	Discipline	I	Pump B	is having too high pressure		

Edit

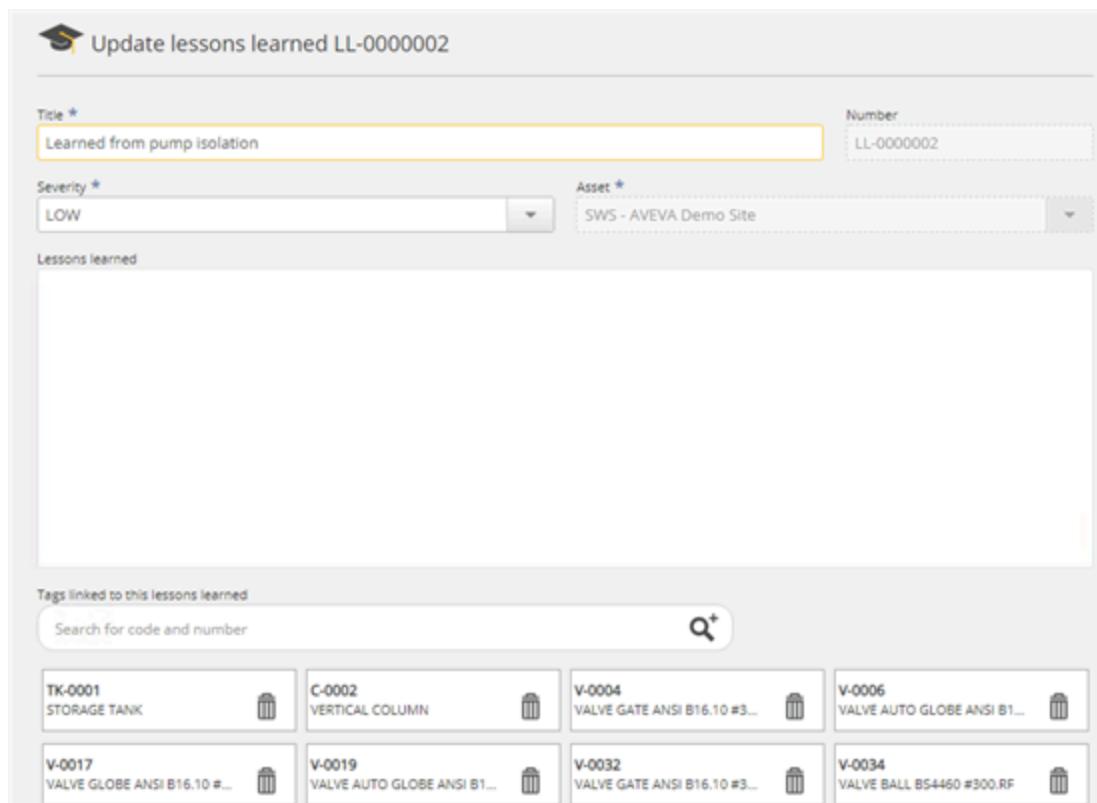
The **Edit** button enables you to edit the details of an entity. Edit will be disabled once an entity is approved.

Edit an item

- Click **Edit** on the information header.



The Edit panel appears. The Edit panel will be different depending on module entity.



Update lessons learned LL-0000002

Title * Learned from pump isolation

Severity * LOW

Asset * SWS - AVEVA Demo Site

Number LL-0000002

Lessons learned

Tags linked to this lessons learned

Search for code and number

TK-0001 STORAGE TANK	C-0002 VERTICAL COLUMN	V-0004 VALVE GATE ANSI B16.10 #3...	V-0006 VALVE AUTO GLOBE ANSI B1...
V-0017 VALVE GLOBE ANSI B16.10 #...	V-0019 VALVE AUTO GLOBE ANSI B1...	V-0032 VALVE GATE ANSI B16.10 #3...	V-0034 VALVE BALL BS4460 #300.RF

Concepts

Tags

About tags

Tags are used to identify pieces of equipment. There is a tag hierarchy, which means there can be a tag for an entire machine as a whole, but the individual parts of the machine can also have tags.

- Tag numbers are unique within a site.
- A tag is always imported into AVEVA™ Operational Safety Management from an external system.

Values

Each tag has associated values.

- Values are imported along with tag.
- These values cannot be changed in AVEVA™ Operational Safety Management.

Value	Comments
<i>Title</i>	Assigned in the external system.
<i>Number</i>	Assigned by the external system.
<i>Criticality flag</i>	<p>Specifies criticality of equipment. This is an optional value; the value can be empty.</p> <p>A <i>safety critical</i> element means the item of equipment is critical to human safety.</p> <p>Example: smoke detector or gas detector</p>
<i>Barrier flag</i>	<p>Specifies whether the equipment is a barrier. This is an optional value; the value can be empty.</p> <p>A barrier tag identifies a piece of equipment that is a physical safety mechanism.</p> <p>Example: A stop valve for a system</p>

Safety warnings

The work order can have a safety warning.

- ⚠ **Safety Warning:** Appears if work order is safety critical.
- 🚧 **Barrier Warning:** Appears if main tag or any of the sub items linked to work order have barriers.

Tag criticality

The color of the tag icon indicates whether the criticality of the main object has been evaluated.

Tag color	Level of criticality
Blue 	Non criticality
Green 	Low criticality
Yellow 	Medium criticality
Red 	High criticality
Red with "S" 	Safety critical element
White 	No criticality, means criticality has not been evaluated

Workflow

Dynamic workflows

The topics in this section describe the dynamic workflow for different entities and how to configure them in AVEVA™ Operational Safety Management Administration. A workflow is based on customizable statuses and processes that are defined in OSM Administration.

Customizable workflows

The workflow for an entity is highly-customizable and configurable; hence the name dynamic.

Each type of entity, such as [Work Permits](#) or [Risk Assessments](#), can have its own customized process workflow.

The work item has a life cycle, which is presented by a set of statuses. The path between the statuses are processes.

Entity life cycle

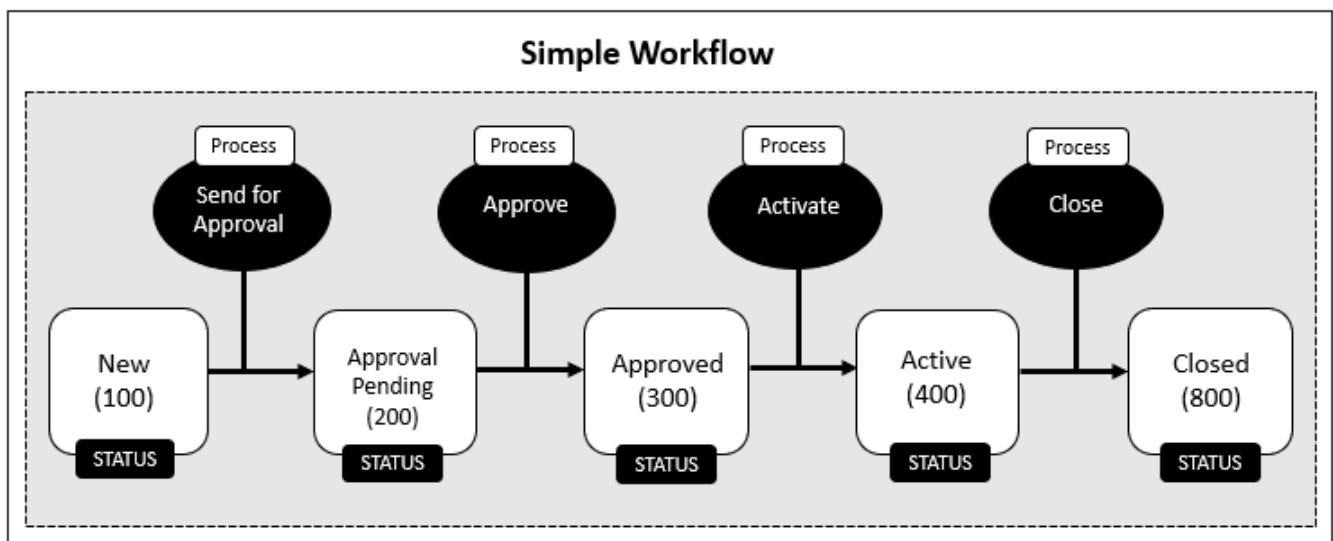
During the workflow, a work item, such as a work permit, moves from one status to the next by means of performing a process.

The entity life cycle always has a starting point and one or more ending points.

- The starting point is always represented by the status *New*.
- The ending point must be either *Closed* or *Canceled*.

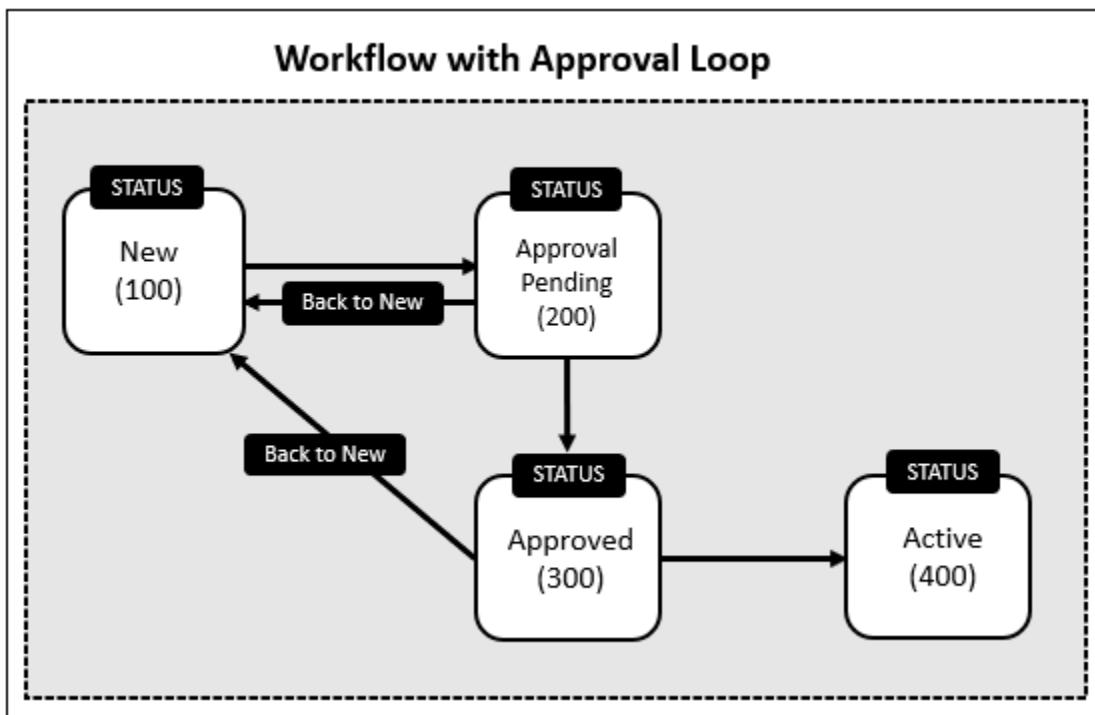
Simple workflow

An example of a simple linear workflow.



Workflow with an approval loop

An example of a workflow with an approval loop.



Processing a Workflow

When you click the process icon, the *Workflow* window opens.

If all configured, there can be three sections to review or complete before performing the process.

- [Summary](#)
- [Signatures](#)
- [Send to Co-worker](#)

Workflow for ISO-005617

Summary

CURRENT STATUS: 100 - New PROCESS: 1. Send for approval NEXT STATUS: 150 - For approval

Signatures

SIGNATURE REQUIRED: Area responsible SIGNED BY: Select/search in code and name SIGN ON BEHALF OF: Select/search in code and name Select/search in code and name

SIGNATURE REQUIRED: Offshore Installation Manager SIGNED BY: Select/search in code and name SIGN ON BEHALF OF: Select/search in code and name

SIGNATURE REQUIRED: Operator responsible SIGNED BY: Select/search in code and name SIGN ON BEHALF OF: Select/search in code and name

Send to co-worker

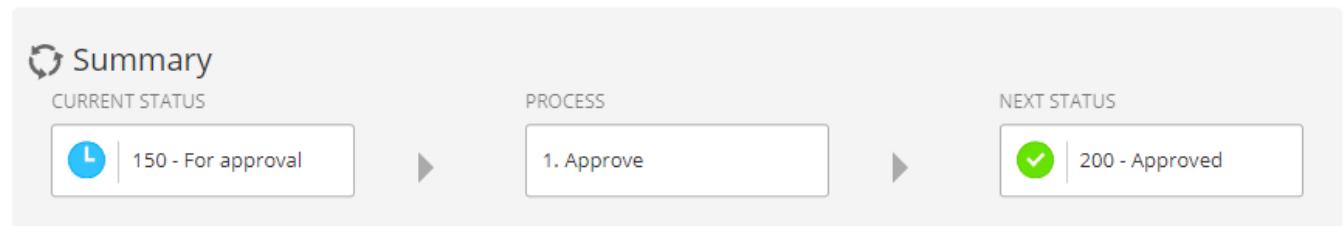
Role: Operational supervisor Message:

Person *: Select/search in code and name

Buttons: Apply signatures, Perform process, Cancel

Summary

The Summary section displays the **Current Status**, the **Process** to be performed, and the **Next Status** of the entity.



Signatures

The Signatures section is optional and is configurable by the administrator. Not all processes will require sign-off, but some processes in the workflow will require signatures. For example, a signature is usually needed to sign off on a work item that is moving from *Approved* status to *Active* status.

Note: It is possible for the administrator to disable signatures for each process. If signatures are disabled, the **Apply Signatures** button will be disabled and only **Perform Process** will be enabled.

List of signatures

If configured a list of signatures displays. Signatures that appeared in orange are required.

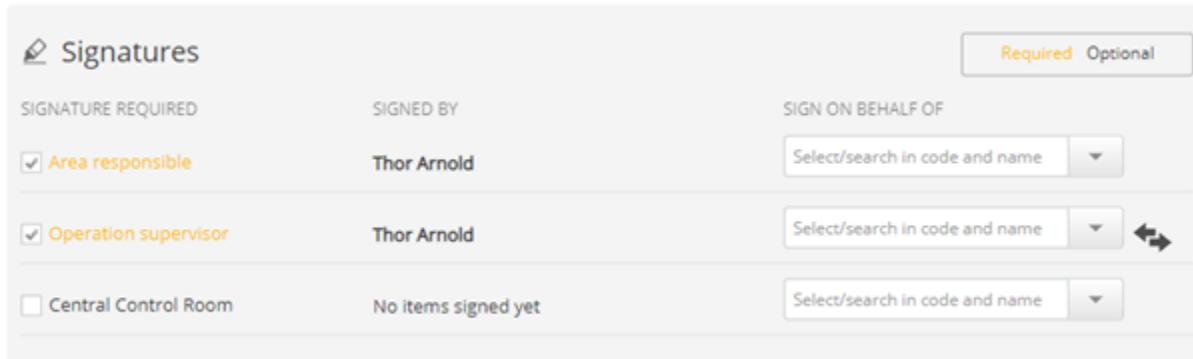
Required signatures *must* be signed in order to process the entity.

Sign on behalf of

Sometimes, you can select a different user and sign on behalf of that user. Whether you can **Sign on behalf of** is a configurable feature.

When **Sign on behalf of** is enabled, you can choose the name of another person who you are signing for from the drop-down list. This might be used when, for example, you need to sign on behalf of a contractor.

If enabled, it will be possible to click **Switch**  to enter name manually. You can enter anything into this field; there is no validation on what is entered manually. The ability to use free text is configurable by administrator.



The screenshot shows a configuration interface for signatures. At the top right are two buttons: "Required" (orange) and "Optional". Below this, there are three sections for roles:

SIGNATURE REQUIRED	SIGNED BY	SIGN ON BEHALF OF
<input checked="" type="checkbox"/> Area responsible	Thor Arnold	Select/search in code and name 
<input checked="" type="checkbox"/> Operation supervisor	Thor Arnold	Select/search in code and name  
<input type="checkbox"/> Central Control Room	No items signed yet	Select/search in code and name 

Apply signatures only (without performing process)

In some cases, several signatures are needed before executing the process.

1. Select the checkbox next to the roles you are signing for. Your name appears.
2. If signing on behalf of, select a person to sign for.
3. Click the **Apply signatures** button. This action applies signatures only. It does not perform the process.



Apply signatures

Perform process

Perform process (including applying signatures)

1. Select the checkbox next to the roles you are signing for. Your name appears.

2. If signing on behalf of, select a person to sign for.
3. Click the **Perform process** button. This action includes applying signatures only.



View history of signatures

You can see a history of signatures on the [Signatures](#) page of an entity.

Send to Co-worker

If configured, the **Send to co-worker** section displays in the *Workflow* window. This is an optional section and is configurable by the administrator.

You can select a role, such as supervisor, to receive a message about the changing status of this work item.

Purpose

There are cases when you perform a process that someone needs to be notified of this action. Perhaps, the action triggers a need for an action on their part.

Sending to co-worker is the equivalent of sending someone a notification. They will receive a new item in their [My Actions](#) list.

For example, that the work item needs to be approved to advance to the next status.

Role

There is always a configured default value in the system for who to notify. Usually the default is set to a specific a role, so that any person in that role can take action on the work item.

If configured, you may be able to select the role and also select the person within that role.

Message

The message text is what you write in the message window. The recipient of the message is the person responsible for taking the next action, such as approving a work item.

The screenshot shows a user interface for sending a message to a co-worker. At the top left is a checkbox labeled "Send to co-worker". Below it is a section titled "Role" with a dropdown menu containing the option "Operational supervisor". Below the role section is another section titled "Person *" with a dropdown menu containing the placeholder text "Select/search in code and name". To the right of these sections is a large, empty text area labeled "Message".

Note: Any message that you add is a public message and will become part of the log history.

Send to co-worker

1. Select a role from the drop-down list.
2. If needed, select a specific person from the list of people.
3. Write a notification message that will be sent to the selected person. The recipient will receive an item in their My Actions list with the attached message.

Perform process

After all signatures have been applied, you can perform the process. This action will process the entity to take it to the next status.

Perform process

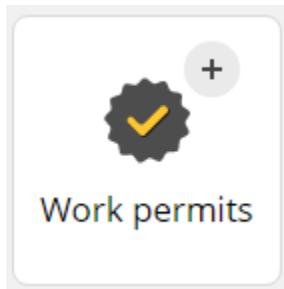
- Click the **Perform Process** button. If there are any business rules that are not allowing entity to process to next state, then those will be shown in an alert box.

If everything is in order, the entity will be processed to next status and this will reflect in the entity header.

Note: A record is kept of all process that are performed on a work item, which you can view in the [Logs](#) for the work items.

Work Permits

This section contains topics that relate to work permits.



Work Permit Library

The Work Permit Library holds all of the work permits for the current location.

What is a work permit?

A *Work Permit* is a document that gives a worker the permission to carry out a job within a specific time frame. Work Permits are needed to perform a restricted activity, such as entering a restricted

area, or using a restricted piece of equipment. There can be many types of Work Permits.

Library tabs

Work Permit library page has these tabs.

<ul style="list-style-type: none"> • Browse All 	The Browse All tab lists all the Work Permits for a particular site.
<ul style="list-style-type: none"> • My Work 	The My Work tab shows only those Work Permits that are added to current user's My Work.
<ul style="list-style-type: none"> • Monitoring 	The Monitoring tab shows work permits that are in a status that has been configured to satisfy the monitoring criteria.
<ul style="list-style-type: none"> • Quick filters 	The Quick Filters are pre-configured filters that show only items that are in a particular status.

Browse all work permits

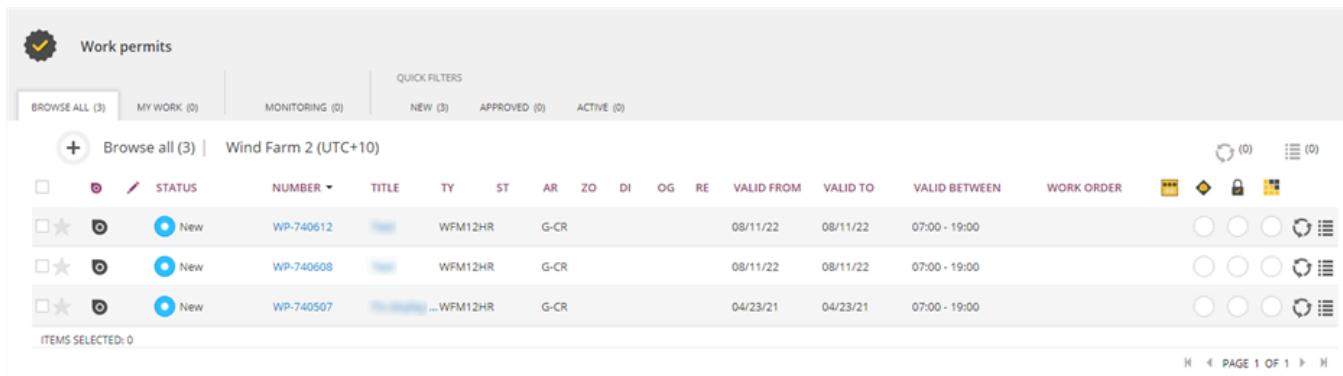
The **Browse All** tab displays work permits in the Work Permit library, according to last used search filter. Unlike other modules, work permits module remembers your last search query and reloads the same query next time you open work permits.

View details of a work permit

- Click a work permit number or description to open the [details](#) tabs for the work permit.

Create a new work permit

- Click the Add  icon to create new work permit.



The screenshot shows the 'Work permits' library page. At the top, there are tabs for 'BROWSE ALL (3)', 'MY WORK (0)', and 'MONITORING (0)'. Below these are 'QUICK FILTERS' for 'NEW (3)', 'APPROVED (0)', and 'ACTIVE (0)'. A search bar shows 'Browse all (3) | Wind Farm 2 (UTC+10)'. The main area displays a table of work permits:

	NUMBER	TITLE	TY	ST	AR	ZO	DI	OG	RE	VALID FROM	VALID TO	VALID BETWEEN	WORK ORDER	Actions
<input type="checkbox"/>	WP-740612	WFM12HR	G-CR							08/11/22	08/11/22	07:00 - 19:00		
<input type="checkbox"/>	WP-740608	WFM12HR	G-CR							08/11/22	08/11/22	07:00 - 19:00		
<input type="checkbox"/>	WP-740507	... WFM12HR	G-CR							04/23/21	04/23/21	07:00 - 19:00		

At the bottom, it says 'ITEMS SELECTED: 0' and 'PAGE 1 OF 1'.

Library icons

These icons appear on the Library page.

Icon	Name	Description
	Add	Click Add icon to add a work permit.
<input type="checkbox"/>	Select	Select the checkbox to select item.
	My Work	Click the star icon to add the item to My Work .
	Plotted	Indicates the work permit has been plotted.
	Signature	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status	Indicates the current status of the item.
	Process Workflow	Click the Workflow icon to show the available processes for the current item and select the next status.
	Options	Opens a menu of options.

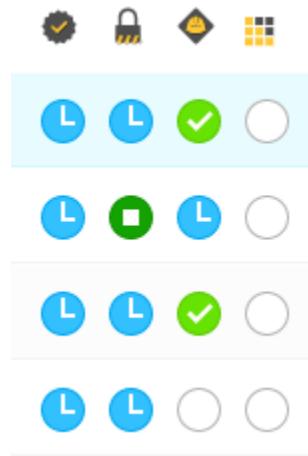
Linked Entities

The icons in the right-most columns represents the linked entities to a work permit.

Icon	Description
	Linked collections
	Linked safe job analysis
	Linked isolation lists
	Linked risk assessments

Status Indicators

The displayed status icon represents the lowest status among the linked entities. For more information, see [Status Indicator icons](#).



My Work

Add a work permit to My Work

- Click the **Star** icon  to add the work permit to [My Work](#). Click the star again to remove it from My Work.

Items with a yellow star  will appear in your My Work list .

Filtering in My Work

It's possible to further refine search criteria, but this query will not be restored next time you open My Work.

	STATUS	NUMBER	TITLE	ST
<input type="checkbox"/>	New	WP-741620	Ne...12HRCGEN OPS	
<input type="checkbox"/>	New	WP-741462	W... 12HRCGEN CRL	
<input type="checkbox"/>	Approved	WP-741460	W... 12HRCGEN OPS	
<input type="checkbox"/>	New	WP-741413	W... 12HRCGEN CRL	
<input type="checkbox"/>	New	WP-741412	W... 12HRCGEN CRL	

Monitoring work permits

Work permits for monitoring

On the **Monitoring** tab, you can view a filtered list of work permits that include:

- Work permits that are scheduled and a portion of the validity period falls inside the current shift.
- Work permits in certain active statuses.

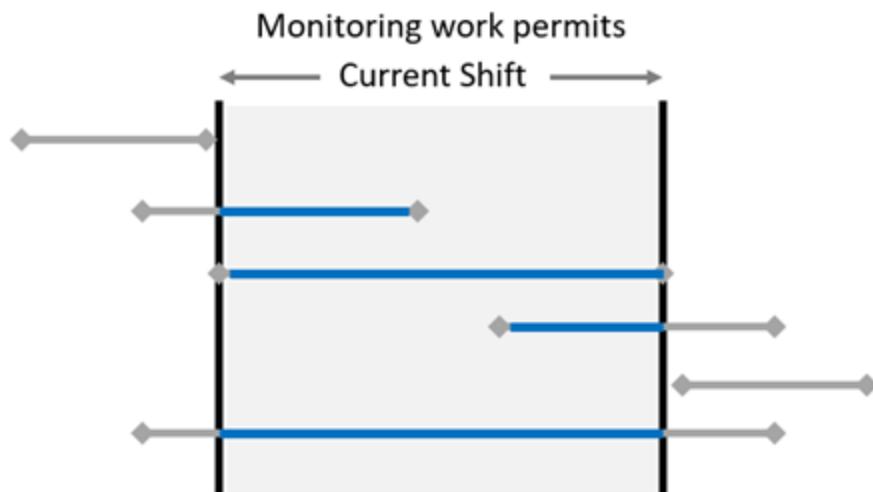
Validity period dates and times

For a work permit to show in the Monitoring tab, some portion of the validity period must fall inside the current shift.

There are two dates and two times: a *Valid from* time and date, and a *Valid to* time and date. The times and dates are independent of each other.

A work permit may be valid for the current day, but the time has expired. If the date of validity period is extended, the work permit will show again in the next day, during the validity times.

At end of a shift, work permits that were visible during that shift will no longer be visible, if the end time of the validity period has expired.



Filters

These filters are applied in the Monitoring view.

Filter	Description
Period	Shows permits when a portion of the validity period falls inside current shift.
Statuses	Configured statuses will be included.

Note: Any changes you make to the filter *will not* be saved.

STATUS	NUMBER	TITLE	TY	ST	AR	ZO	DI	OG	RE	VALID FROM	VALID TO	VALID BETWEEN
Active	WP-741461	Work ... 12HRCGEN OPS	TSN	NZO...						12/04/22	12/04/22	07:00 - 19:00

Quick filters

The **Quick Filter** tabs provide easy access to entities that have the same specified status. The statuses that display as tabs in AVEVA™ Operational Safety Management Web Application are configured by the administrator for each module.

In this example, Quick Filter tabs display for these statuses:

- *New*
- *Approved*

- Active

	STATUS	NUMBER	TY	ST	AR	ZO	DI	OG	RE	VALID FROM	VALID TO
<input type="checkbox"/>	● New	WP-741741	12HRGEN OPS	TSE	EZONE					08/13/22	08/13/22
<input type="checkbox"/>	● New	WP-741740	12HRGEN OPS	TSE	EZONE					08/13/22	08/13/22
<input type="checkbox"/>	● New	WP-741642	12HRGEN OPS	TAN	NZO...					06/18/22	06/18/22
<input type="checkbox"/>	● New	WP-741620	12HRGEN OPS	TAE	EZONE					06/11/22	06/11/22
<input type="checkbox"/>	● New	WP-741462	12HRGEN CRL	TAE	EZONE					04/21/22	04/21/22

Work with work permits in Library

Setting up work permits

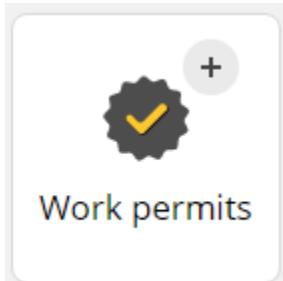
Use this list as a basic guideline for setting up your work permits.

- | | |
|---|---|
| <ul style="list-style-type: none">• Create new work permit | Create a new work permit.

Enter the required fields on the <i>Create new work permit</i> page. |
| <ul style="list-style-type: none">• Fields on Create New Work Permit page | Fill in the details on the form itself and save the form. |
| <ul style="list-style-type: none">• Fill in the work permit form | Add a plot location for the work permit. |
| <ul style="list-style-type: none">• Plot the Work Permit | Attach any relevant work items to the work permit. |
| <ul style="list-style-type: none">• Add a reference to a work permit | Perform the workflow process to change the status of the work permit. |
| <ul style="list-style-type: none">• Perform workflow on a work permit | |

Create new work permit

You can create a new work permit from the [OSM Home page](#) or from the library page.



Create from Library page

1. On the Work Permit Library page, click the **Add** button.
2. On the Create new work permit screen, enter the details. The fields with a blue star indicated required information.

For more information, see [Fields on Create New Work Permit page](#).

The screenshot shows the 'Create new work permit' page. At the top left is a checkmark icon and the text 'Create new work permit'. The page contains several input fields:

- Title ***: New work permit
- Number**: [To be generated]
- Description**: (Large text area)
- Site (UTC+10) ***: Wind Farm 2
- Type ***: WFM 12 Hour Permit
- Ongoing work**: (checkbox)
- Area ***: First Floor Control Room
- Sub type**: Search in code and name
- Requires electro involvement**: (checkbox)
- Zone**: Search in code and name
- Valid from date**: 08/17/22
- Number of periods**: 1
- Valid to date**: 08/17/22
- System**: Search in code and name
- Discipline**: Search in code and name
- Work order**: Search (min. 3 chars.) in several fields
- Created**: (date/time field)
- Updated**: (date/time field)
- Applicant ***: Thor Arnold
- Each period, valid between**: 07:00 - 19:00
- Created**: (date/time field)
- Updated**: (date/time field)
- Applicant ***: Thor Arnold

A note at the bottom right says: * Required fields.

At the bottom are two buttons: 'Create new work permit' (blue) and 'Cancel'.

- Click **Create new work permit**. You are returned to the details page of the work permit, not to the library.

Fields on Create New Work Permit page

These are the fields for a work permit item on the Create page. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	A short title for the work permit.
• <i>Number</i>	The number will be auto-generated.
• <i>Description</i>	The Description field is always read-only. You can change what appears in the Description field only in

Field	Description
	the form itself.
• <i>Site*</i>	The site for the work permit. This value is populated by your preferred site, but can be edited when creating work permit.
• <i>Area*</i>	The area where the work permit is valid.
• <i>Zone</i>	The zone where the work permit is valid.
• <i>System</i>	The type of system that applies to the work permit.
• <i>Discipline</i>	The type of discipline that applies to the work permit.
• <i>Work order</i>	The work order number that applies to the work permit.
• <i>Type*</i>	The type of work permit from available types.
• <i>Subtype</i>	The work permit subtype. If the type has subtypes, this field is required.
• <i>Ongoing work</i>	Used to flag when work is ongoing work. This value is searchable.
• <i>Requires electro involvement</i>	Used to flag a work permit as needing involvement of the electro discipline. This value is searchable.
• <i>Valid from date</i>	The first day that the work permit is valid.
• <i>Number of periods</i>	How many periods the work permit will be valid for. This field is prefilled with the default value. However, it can also have a maximum value that is larger than the default value.
• <i>Each period, valid between</i>	The times that the period is valid between.
• <i>Created</i>	Date and time the work permit was created.

Field	Description
• <i>Updated</i>	Date and time the work permit was last updated. If you update details, form values, or attach a reference to work permit, this value will be updated.
• <i>Applicant*</i>	The applicant for the work permit. By default, this value is populated with your name, but you can change to another person. Select from the drop-down list, or click Switch to enter a name in free text.

Fill in the work permit form

When you create a new work permit, the first page you will see is the Form page.

You need to make selections on the form and click **Save changes**.

Search for a work permit

You can search work permits by supplying search query parameters.

Open the Search panel

1. Click the  icon on right side of the screen. The Search panel expands.
2. Select the search details and click **Search** to search for work permits with the given parameters.
The search panel closes and the library list refreshes to show only work permits that meet the search filter.

Reset the search query

- Click **Reset all filters** to reset the search query values.



Close the Search panel

- Click  to close the Search panel.

Pin the search panel

- Pin the search panel to have it always open.

See also [Work permit search parameters](#)

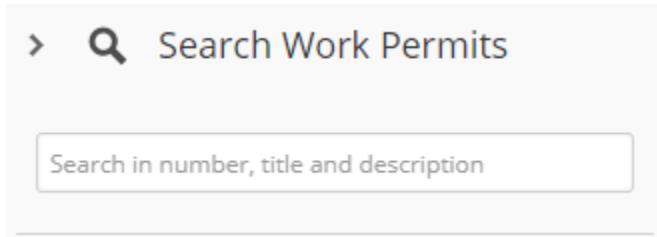
Work permit search parameters

Using the Search panel

This topic describes using search parameters in the search panel.

Search for a work permit

Search for a specific work order by typing in some characters of a number, title, or description.



Site

Click the **Search** icon to display drop-down menu of available sites. You can select multiple sites.

Click **Reset** to return the filter to empty.

The screenshot shows a search interface for sites. At the top, it says "Site". Below that is a search bar with the placeholder "Search in code and name" and a magnifying glass icon. Underneath the search bar are two buttons: "Wind Farm 1" and "Wind Farm 2", each with a small circular "X" icon to its right.

Period

Select current shift or next shift. You can also specify dates or specify a range of shifts.

- If you select **Date**, enter the dates to search between.
- If you select **Shifts**, you can specify a range of shifts that the work permits should be valid for. This gives the possibility to search for an isolated range of shifts in the future. Enter numeric values in the **From** and **To** fields. Values can be from 1 to 28, where 28 is 14 days work length.

The screenshot shows a "Period" filter interface. It includes a "Reset" button at the top right. Below it are four radio button options: "Current shift", "Next shift", "Dates", and "Shifts". The "Shifts" option is selected, indicated by a solid black circle. To its right are two input fields containing the numbers "1" and "2", separated by a vertical line. The input field for "2" is highlighted with a yellow border.

Example of possible results.

From	To	Result
1	Empty	Current shift
2	Empty	Next shift
1	2	Current and next shift
3	Empty	Only shift number 3 counting from current shift
3	4	Shift number 3 and 4
3	5	Shift number 3, 4, and 5
Empty	Empty	Error message
Empty	Any value	Error message
3	1	Error message since From is greater than To

Click **Reset** to return the filter to empty.

Show only

Select a category to filter on work permits.

Click **Reset** to return the filter to empty.

Show only

- Expired work permits
- Ongoing work
- Requires electro involvement
- Outside period (Valid between)
- Moved work permits
- Extended work permits

Status

Select the relevant statuses to include in the search filter.

Click **Reset** to return the filter to its default state. Some statuses are configured as default by the administrator.

Status

- 100 - New
- 120 - Technical approval
- 150 - For approval
- 200 - Approved
- 300 - Active
- 350 - Inactive
- 400 - Expired
- 500 - On hold
- 600 - Completed
- 800 - Closed
- 900 - Cancelled

Other parameters

Select other query parameters. It is possible to select multiple values.

Type	<input type="checkbox"/> WFM12HR - WFM 12 Hour Permit
Area	Select/search in code and name 
Zone	Select/search in code and name 
System	Select/search in code and name 
Discipline	Select/search in code and name 
Applicant	Search for part of the name
Created by	Select/search in code and name 
Created	<input type="text"/> dd/mm/yy - <input type="text"/> dd/mm/yy

Select multiple sites in search panel

It is possible to select multiple sites in the Site field and search across sites.

Note: Removing the original site will change your setting for preferred site to the new site you added. This is the first new site you added, if you add multiple new sites. If you create a new work permit now, the new site will be used for the work permit.

Remove additional sites

You can remove an additional site by clicking the X icon next to the Site.

Unavailable fields

When multiple sites are added, the following fields are not available to search and filter against because they can be different for each Site.

- Type
- Area
- Zone
- System
- Discipline

Perform workflow on a work permit

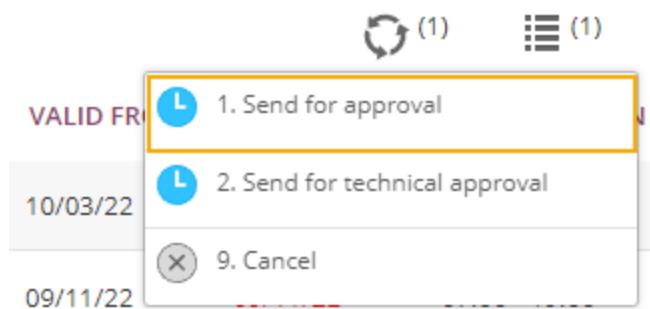
Process a work permit to the next status

In Work Permit library, you can select a single work permit and process the workflow on it. You can also [Process multiple work permits at one time \(batch processing\)](#).

Perform workflow on a work permit

1. In the Work Permit library, find a work permit band select the **Workflow** icon at the end of the row.

2. Select the next status for the work permit.



The Workflow dialog box appears.

3. Make the appropriate selections and click **Perform process**.

The screenshot shows the 'Workflow for WP-741901' dialog box. At the top, it displays the current status '100 - New', the process step '1. Send for approval', and the next status '150 - For approval'. Below this, the 'Send to co-worker' section is shown, with a dropdown for 'Role' set to 'Approver' and a dropdown for 'Person' with the placeholder 'Select/search in code and name'. A message input field contains the text 'Please approve.' At the bottom, there are three buttons: 'Apply signatures', 'Perform process' (highlighted with a yellow border), and 'Cancel'.

Process multiple work permits at one time (batch processing)

Process multiple work permits at one time (batch)

In Work Permit library, you can process several work permits at the same time.

Prerequisites

There are some prerequisites before you can process multiple work permits. These are:

- All permits must have the same type.
- All permits must be in the same status.

Processing of multiple work permits

- Any signatures applied already, will not be overwritten.
- If some of the permits cannot be processed due to business rules, you will get a list of errors.
- All permits that can be processed, will be processed.
- Be aware that any permits that are no longer part of the current filter, will be removed from the list after the processing.

Process multiple work permits

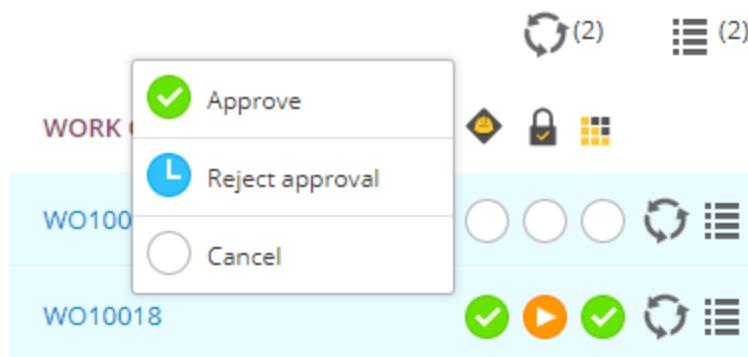
1. In the Work Permit Library, select the work permits by selecting the check boxes to the left.

The screenshot shows the 'Work permits' section of the OSM Web User Guide. At the top, there's a header with a checkmark icon, the title 'Work permits', and a 'QUICK FILTERS' button. Below the header, there are five tabs: 'BROWSE ALL (17)', 'MY WORK (0)', 'PLANNING (1)', 'MONITORING (0)', and 'ACTIVE EXTENDED (0)'. A large '+' button labeled 'Browse all (17)' is visible. The main area displays a table of work permits with columns: STATUS, NUMBER, TITLE, TY, ST, AR, and ZO. Two rows are shown, both with a checked checkbox in the first column and a yellow star icon. The first row has a blue circular icon with a 'L' and the status 'For approval', number 'WP-0000062', title 'VIDEOINSPE...', category 'L1', and codes '02HB' and 'S10'. The second row also has a blue circular icon with a 'L' and the status 'For approval', number 'WP-0000063', title 'INSPECTION...', category 'L1', and codes '03EN' and 'P30'. The entire checkbox column for the first row is highlighted with a yellow box.

STATUS	NUMBER	TITLE	TY	ST	AR	ZO
<input checked="" type="checkbox"/>	WP-0000062	VIDEOINSPE... L1	For approval	02HB	S10	
<input checked="" type="checkbox"/>	WP-0000063	INSPECTION... L1	For approval	03EN	P30	

2. Click **Process selected** in the upper right corner. Select the next status.

The screenshot shows a process selection interface with several buttons. At the top, there's a button with a circular arrow icon and '(2)' next to it, which is highlighted with a yellow box. Below it are four small icons: a yellow square with dots, a diamond shape, a lock icon, and a grid icon. There are two rows of four circular icons each. The top row contains three empty circles and one circular arrow icon. The bottom row contains three green circles with checkmarks and one circular arrow icon. To the right of the bottom row is a set of icons: a green checkmark, an orange play button, a green checkmark, a circular arrow, and a grid icon.



The *Workflow* dialog box appears, but with a blue bar on top with a message that you're about to process X number of permits.

3. Make the appropriate selections and click **Perform Process**.

The screenshot shows a 'Workflow for 3 work permits' dialog box. At the top, it says 'Heads up! You're about to process 3 work permits. If any permits are signed already, the signatures will remain.' Below this is a 'Summary' section with three boxes: 'CURRENT STATUS' (150 - For approval), 'PROCESS' (1. Approve), and 'NEXT STATUS' (200 - Approved). The main area is titled 'Signatures' and contains three rows. Row 1: 'SIGNATURE REQUIRED' (Area responsible, checked), 'SIGNED BY' (Thor Arnold (remaining 2)), 'SIGN ON BEHALF OF' (dropdown). Row 2: 'SIGNATURE REQUIRED' (Operation supervisor, checked), 'SIGNED BY' (Thor Arnold (remaining 3)), 'SIGN ON BEHALF OF' (dropdown). Row 3: 'SIGNATURE REQUIRED' (Central Control Room, unchecked), 'SIGNED BY' (No items signed yet), 'SIGN ON BEHALF OF' (dropdown). At the bottom are buttons: 'Apply signatures' (disabled), 'Perform process' (disabled), and 'Cancel'.

Change validity period for work permits

Change validity period

In the Work Permit library, you can select one or several permits and move the start date.

Moving the validity period of work permits

You can move the validity period of a single work permit or multiple work permits by pushing the start time forward in time.

Plot plan icon for moved work permits

Work permits that have been plotted and had their validity time moved will display an orange icon on the plot plan—until the status of the work permit changes.



Change validity period for multiple work permits

1. In the Work Permit Library, select the work permits by selecting the check boxes to the left.

The screenshot shows the 'Work permits' library interface. At the top, there's a toolbar with a checkmark icon, the title 'Work permits', and tabs for 'BROWSE ALL (17)', 'MY WORK (0)', 'PLANNING (1)', 'MONITORING (0)', and 'ACTIVE EXTENDED (0)'. Below the toolbar is a search bar with '+ Browse all (17)' and a status filter. The main area displays a table of work permits with columns for STATUS, NUMBER, TITLE, TY, ST, AR, and ZO. Two rows are selected and highlighted with a yellow border. The first selected row is for approval, number WP-0000062, titled 'VIDEOINSPE...', valid from 02HB to S10. The second selected row is also for approval, number WP-0000063, titled 'INSPECTION...', valid from 03EN to P30.

STATUS	NUMBER	TITLE	TY	ST	AR	ZO
For approval	WP-0000062	VIDEOINSPE...	L1	02HB	S10	
For approval	WP-0000063	INSPECTION...	L1	03EN	P30	

2. Click the Options menu in the upper right corner. Select **Move validity period**.

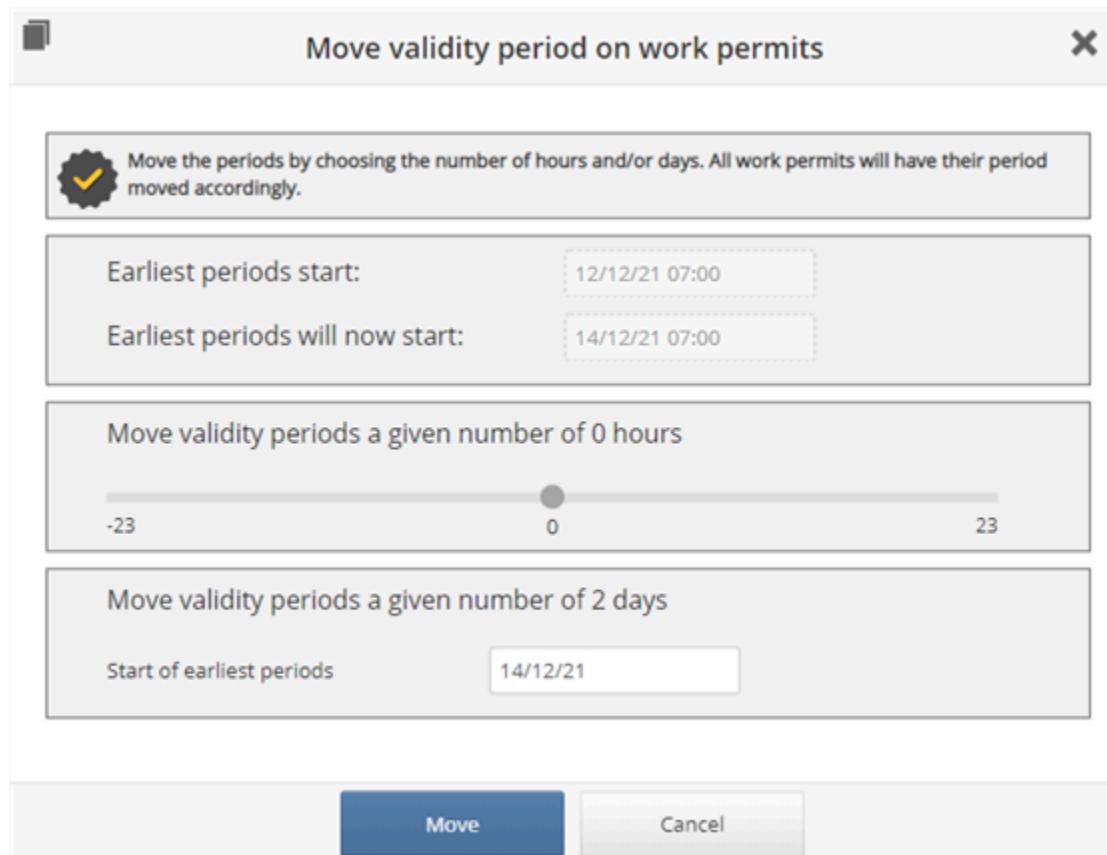
The screenshot shows the 'Options' menu in the Work Permit Library. The menu includes icons for refresh, collections, manage collections, move validity period, and print. The 'Move validity period' option is highlighted with a blue selection bar.

The Move validity period on work permits dialog box appears.

3. On the dialog box, use the sidebar to move the validity period by a given number of hours, or use the date

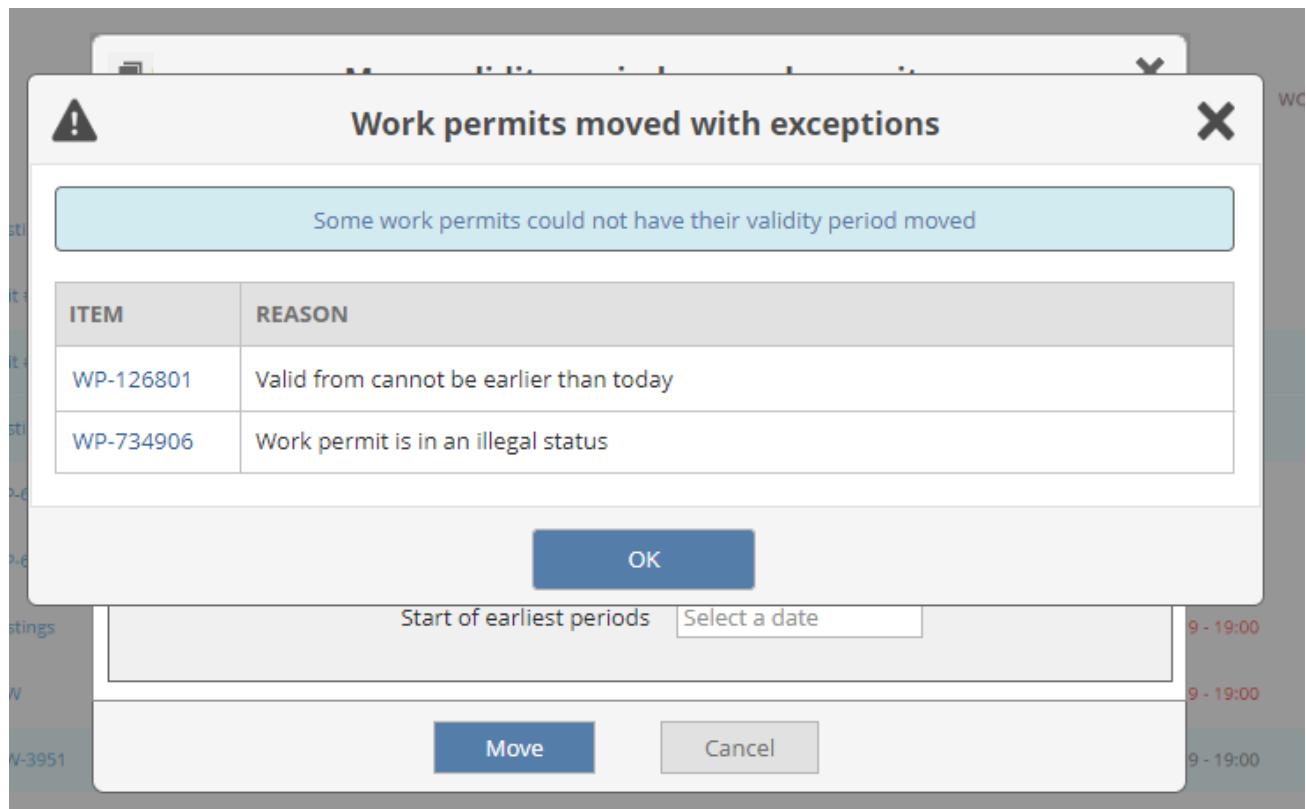
picker to change the validity period by a given number of days.

All the selected permits will be moved the same number of days/hours and the permit with the earliest start period and new calculated earliest start period is shown in the two upper fields.



4. Click **Move**.

If anything prevents one or more of the permits from having their validity period changed, a message box displays with a description of the reason.



Details for work permits

Details tabs for work permits

When you click on a Work permit in the [Work Permit Library](#), you can access an overview of the details for that specific Work permit.

Open the work permit

- Click a Work permit in the Library.

Work permit tabs

Each work permit has several tabs containing the details about the work permit.

FORM	PLOT LOCATION 	REFERENCES (1)	ATTACHMENTS (1)	SIGNATURES	LOGS
• Form	View a work permit form.				
• Plot Location	View plot plans that are configured for the area of the work permit.				
• References	Link related work items to work permit.				
• Attachments	Add attachment to the work permit.				
• Signatures	View signatures for the work permit.				
• Logs	View logs for the work permit.				

Work permit information header

When you click on a work permit in the library list, you will be navigated to the details tabs. At the top of the page, there is an information header with details about the work permit. This includes number, title, description, status, site, and other important information for the item.

Below this header, the details of the item are distributed on different tabs.

 WP-743402
STATUS 100 - New SITE (UTC+13) Wind Farm 1 AREA Turbine Fields West ZONE West Zone SYSTEM Not selected DISCIPLINE Not selected VALID FROM 13/02/2024 VALID TO 13/02/2024 VALID BETWEEN 07:00 - 19:00 TYPE 12HRCEN SUB TYPE OPS WORK ORDER Not selected DUPLICATED FROM WP-741901

Icons on information header

- Status Indicator icons
- Signature icons

Signature icon

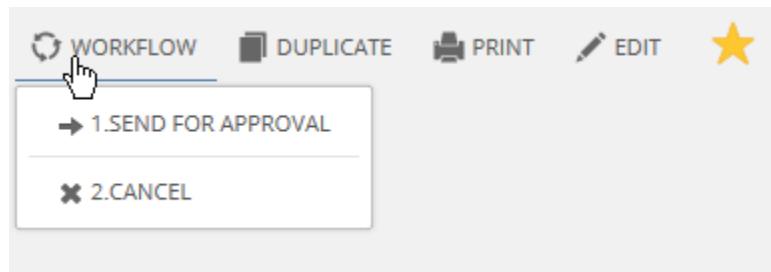
- The green pen indicates that all required signatures have been added.
- The crossed-out yellow pen indicates that signing process has started, but is not complete.



Action buttons on header

The information header contains these possible action buttons.

- [Workflow](#). Shows the available processes for the item for the current status. These processes are configurable by the administrator.
- [Duplicate](#). Creates a copy of an item.
- [Print](#). Generates a report in PDF format.
- [Edit](#). Opens to the **Edit** page where you can edit the details of the item.
- [My Work](#). Adds the item to your **My Work** list.



Process Workflow on work permit

The processes that you can perform will depend on the access you have in the configuration.

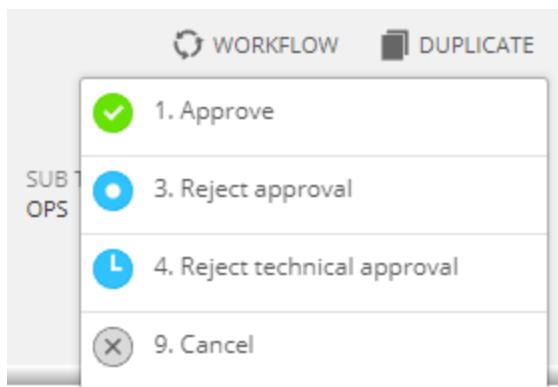
Perform workflow

1. In the Details view, click the **Workflow** icon in the upper-right corner.



A list of processes displays.

2. Select a process to perform.



The **Workflow** dialog box appears.

3. Review the [Summary](#) section that this is the operation you want to perform.
4. If signatures are required, sign in the [Signatures](#) section
5. If a message is required, write a message in the [Send to Co-worker](#) section.
6. Click **Perform process**.

Summary

CURRENT STATUS	PROCESS	NEXT STATUS
150 - For approval	1. Approve	200 - Approved

Signatures

SIGNATURE REQUIRED	SIGNED BY	SIGN ON BEHALF OF
<input checked="" type="checkbox"/> Area responsible	[User Name]	Select/search in code and name
<input checked="" type="checkbox"/> Operation supervisor	[User Name]	Select/search in code and name
<input checked="" type="checkbox"/> Central Control Room	[User Name]	Select/search in code and name

Process Buttons:

- Apply signatures
- Perform process
- Cancel

Extending work permits

There may be cases when a work permit expires for the day and you want to extend the activation time for that day.

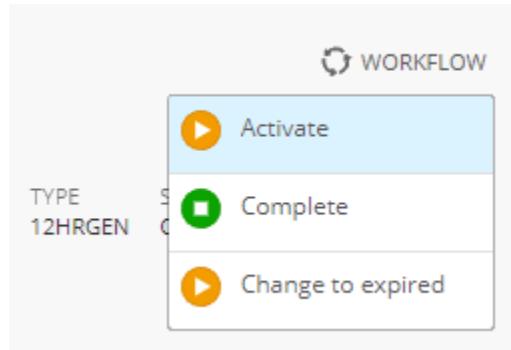
The option to extend is included on certain processes where it is enabled. For example, when moving the work permit from an inactive status to active status.

Guidelines

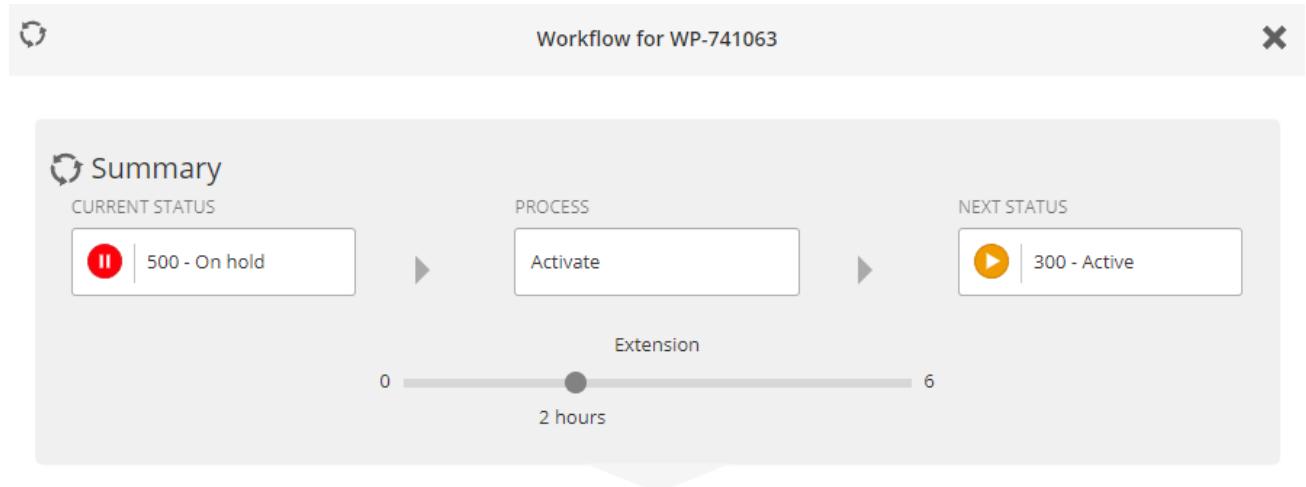
- You can only add, not remove extended time.
- You can extend multiple times up to the maximum limit of allowed extension.
- You cannot extend past the starting time of next day.

Extend the activation time of a work permit

1. Click the Workflow icon and select **Activate**.



2. On the Workflow dialog box, under **Extension**, move the slider forward to add time (hours) to the work permit.



3. Perform the process.

You will see that in the information header, the **Extended To** item appears with the new end time for activation.

	STATUS	300 - Active	(UTC+13)	Wind Farm 1	AREA	Turbine Fields West	ZONE	West Zone	SYSTEM	Not selected	DISCIPLINE	Not selected	VALID FROM	24/11/21	VALID TO	24/11/21	VALID BETWEEN	07:00 - 19:00	EXTENDED TO	21:00 (24/11/21)	TYPE	12HRCEN	SUB TYPE	OPS
--	---------------	--------------	----------	-------------	------	---------------------	------	-----------	--------	--------------	------------	--------------	------------	----------	----------	----------	---------------	---------------	--------------------	------------------	------	---------	----------	-----

Duplicate a work permit

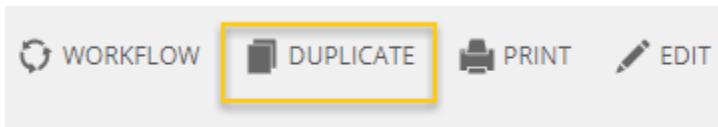
When duplicating a work permit, you can specify what elements of the work permit to duplicate.

Notes

- It will not be possible to duplicate a work permit where the work permit type is set to *Inactive* or *Obsolete* in the system.
- If a work permit form template has been changed, it will not be possible to duplicate the content. The **Copy contents from Work permit form** checkbox will be disabled and it will no longer be possible to copy the layout and configuration of form because the form template has changed.

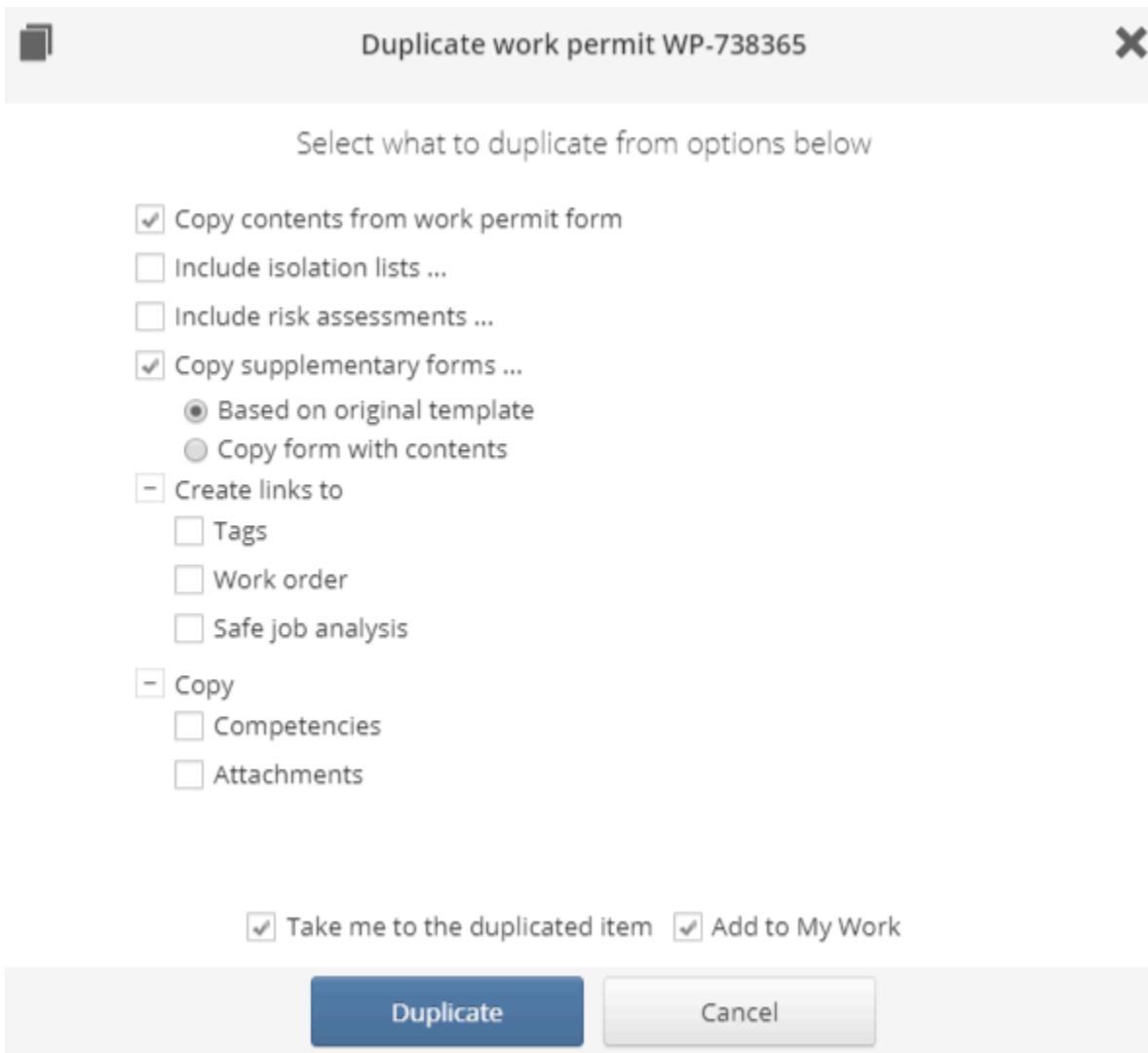
Duplicate a work permit

1. On the Work Permit details page, click **Duplicate** in the information header.



The *Duplicate* form appears.

2. Select the options that you want to duplicate to the new work permit and click **Duplicate**.



Duplicate work permit WP-738365

Select what to duplicate from options below

Copy contents from work permit form

Include isolation lists ...

Include risk assessments ...

Copy supplementary forms ...

Based on original template

Copy form with contents

Create links to

Tags

Work order

Safe job analysis

Copy

Competencies

Attachments

Take me to the duplicated item Add to My Work

Duplicate **Cancel**

Print work permits

Printing work permits

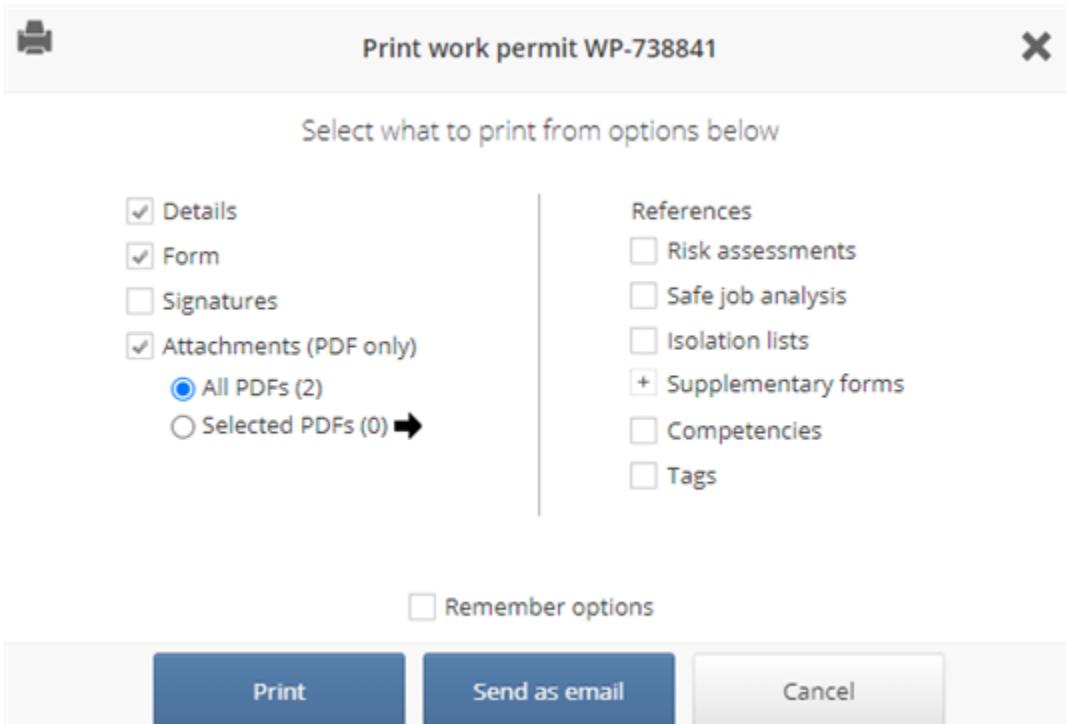
When printing a work permit, you are given the option to print the form, attachments, and linked references at the same time.

Print a work permit and its attachments

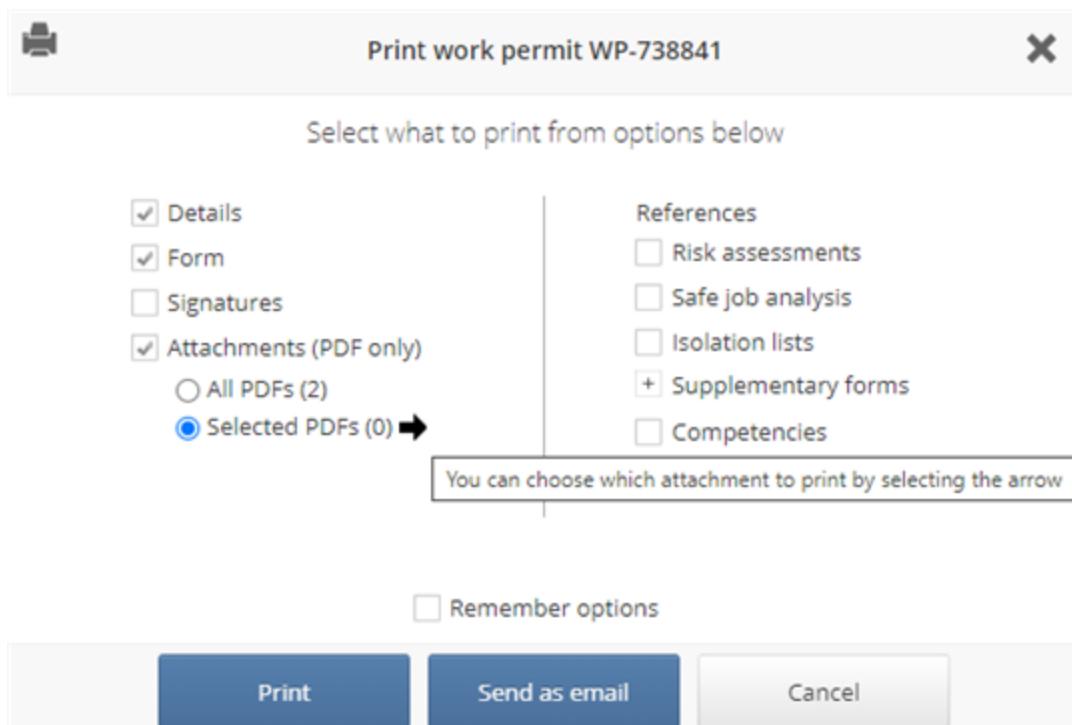
1. Open the work permit and click the **Print** button.



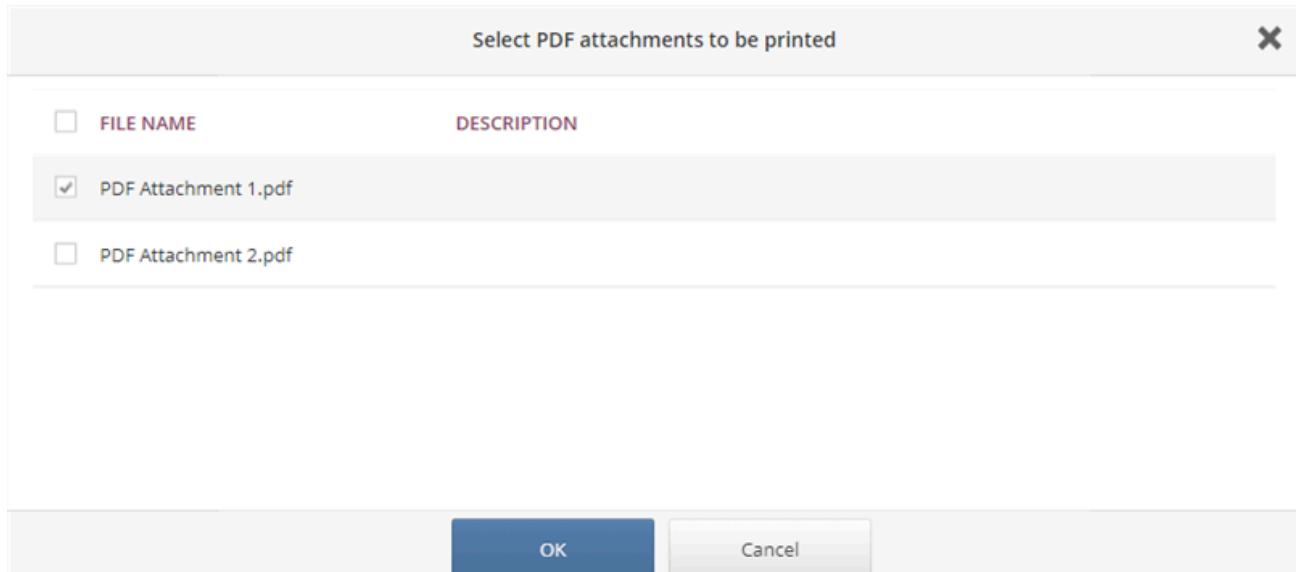
2. Select which details and linked items to print.
3. (Optional) If there is more than one PDF attachment, you can select the **Attachments** checkbox and choose whether to print all PDF attachments or select which PDFs to print.



4. (Optional) Click the **Selected PDFs** option and then click the arrow ➔ icon.



5. (Optional) Select the **Remember options** checkbox to remember your print options for next time (not including attachment selection).
6. Select the attachments you want to print and click **OK**.



7. Click **Print**.

Edit work permit fields

Note: If status of work permit is read-only, you can open the edit view, but fields will be disabled.

Edit fields on work permit form

1. On the Work Permit library page, click the work permit to open it.
2. Click **Edit** in the information header.



The Edit form appears. Not all properties are available for edit.

For more information, see [Fields on Edit Work Permit page](#).

The screenshot shows the 'Update work permit' edit form. Key fields include:

- Title ***: Updated work permit
- Description**: (Large text area)
- Site (UTC+10) ***: Wind Farm 2
- Type ***: WFM 12 Hour Permit
- Area ***: First Floor Control Room
- Sub type**: Search in code and name
- Zone**: Search in code and name
- Valid from date**: 08/17/22
- Number of periods**: 1
- Valid to date**: 08/17/22
- System**: Search in code and name
- Discipline**: Search in code and name
- Work order**: Search (min. 3 chars.) in several fields
- Created**: 08/17/22 11:43
- Updated**: 08/17/22 11:43
- Applicant ***: Thor Arnold

* Required fields

Buttons at the bottom: Save changes, Cancel

3. Click **Save**.

Fields on Edit Work Permit page

Note: If status of work permit is read-only, you can open the edit view, but fields will be disabled.

These are the fields for a work permit item on the Edit page.

Field	Description
• <i>Title</i>	A short title for the work permit.
• <i>Number</i>	The number that was auto-generated for the work permit.
• <i>Description</i>	The Description field is always read-only. You can change what appears in the Description field only in the form itself.
• <i>Site</i>	In edit view, this field is read-only. It specifies the site for the work permit.
• <i>Area</i>	The area where the work permit is valid. If you change the area for a work permit and you have plotted that work permit, the plot point will be lost.
• <i>Zone</i>	The zone where the work permit is valid.
• <i>System</i>	The type of system that applies to the work permit.
• <i>Discipline</i>	The type of discipline that applies to the work permit.
• <i>Work Order</i>	The work order number that applies to the work permit.
• <i>Type</i>	In edit view, this field is read-only. It specifies the type of work permit from available types.
• <i>Subtype</i>	The work permit subtype.
• <i>Ongoing work</i>	Used to flag when work is ongoing work. This value is searchable.
• <i>Requires electro involvement</i>	Used to flag a work permit as needing involvement of the electro discipline. This value is searchable.
• <i>Valid from date</i>	The first day that the work permit is valid.

Field	Description
• <i>Number of periods</i>	How many periods the work permit will be valid for.
• <i>Each period, valid between</i>	The times that the period is valid between.
• <i>Created</i>	Date and time the work permit was last updated. If you update details, form values, or attach a reference to work permit, this value will be updated.
• <i>Updated</i>	The applicant for the work permit. By default, this value is populated with your name, but you can change to another person. Select from the list or use the Swap to Free Text button to enter a new name.
• <i>Applicant</i>	The applicant for the work permit.

Forms

[View form for work permit](#)

Form tab

On the **Form** tab, you can view the Work Permit form according to the work permit type that was selected while creating the work permit.

Information header

The [Information header](#) across the top of the screen provides details about the work permit and action buttons.

WP-741802 Test

STATUS	SITE (UTC+12)	AREA	ZONE	SYSTEM	DISCIPLINE	VALID FROM	VALID TO	VALID BETWEEN	TYPE	SUB TYPE	WORK ORDER
100 - New	Wind Farm 1	Transformer Station West	West Zone	Not selected	Not selected	09/07/22	09/07/22	07:00 - 19:00	12HREG	CRL	Not selected

FORM PLOT LOCATION REFERENCES (1) ATTACHMENTS (1) SIGNATURES LOGS

Windy Farms Ltd.
Auckland, New Zealand

Work Permit 12 Hour Electrical

Permit No: WP-741802

<input type="checkbox"/> Requires turbine shutdown	<input type="checkbox"/> Working at height	<input type="checkbox"/> Requires barrier
<input type="checkbox"/> Blade maintenance	<input type="checkbox"/> Critical lifting operation	<input type="checkbox"/> Isolation of safety system
<input type="checkbox"/> Engine maintenance	<input type="checkbox"/> Other/critical operation	<input type="checkbox"/> Entry (confined space)

Applicant name:	Discipline:	Phone:	<input type="checkbox"/> SAFE JOB ANALYSIS NO:
Title:			
Work description:			WORK ORDER NO:
			ISOLATION LIST NO:
<input type="checkbox"/> Day <input type="checkbox"/> Night			
Date:	From hour:	To hour:	
09/07/22	07:00	19:00	

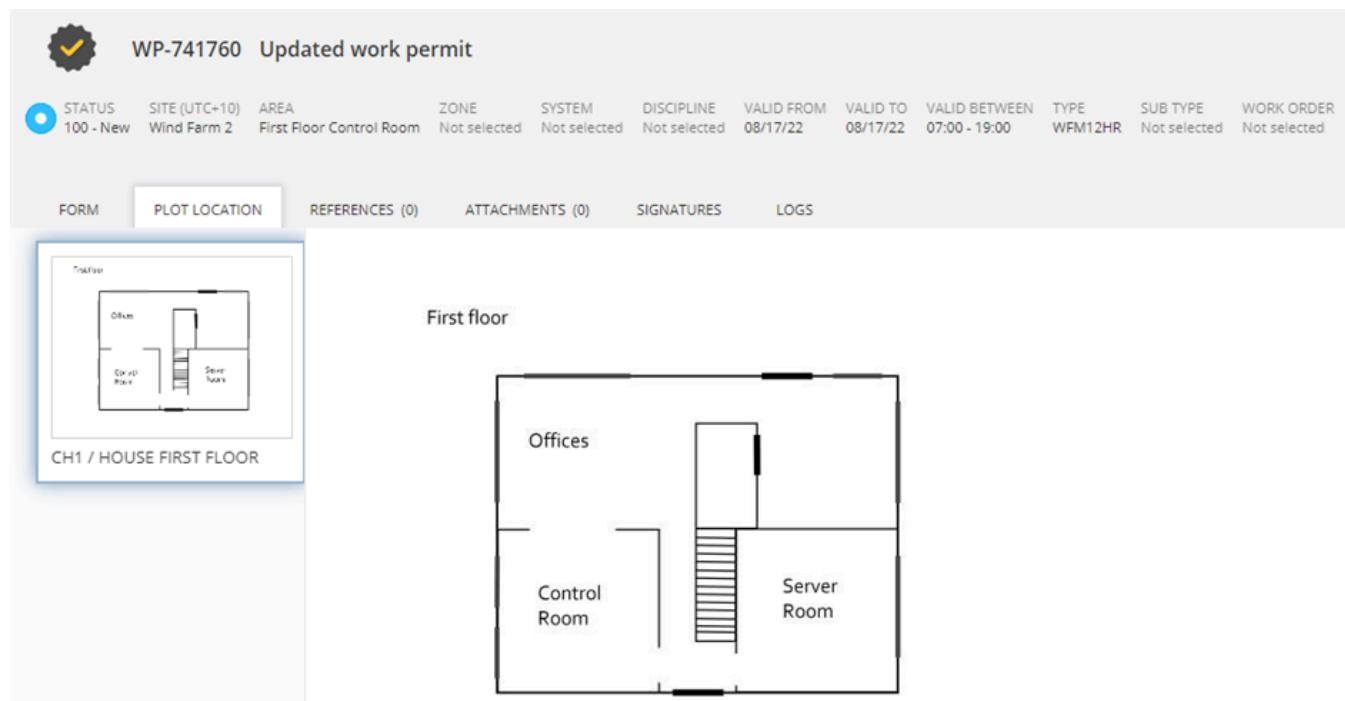
Plot Locations

Plot Location tab

On the **Plot Location** tab, you can see all plot plans that are configured for the area for which the work permit was created. An area can have several plot plans associated with it.

You can point to the exact work location that the work permits relates to.

- [Add and edit plot locations](#)
- [Delete a plot location](#)
- [View symbol legend](#)



Add and edit plot locations

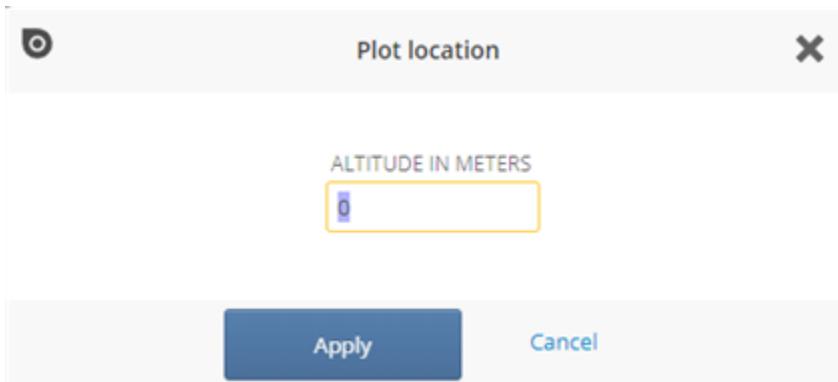
Add a plot location

Plot locations give the control room a visual overview of all the places where work is being carried out.

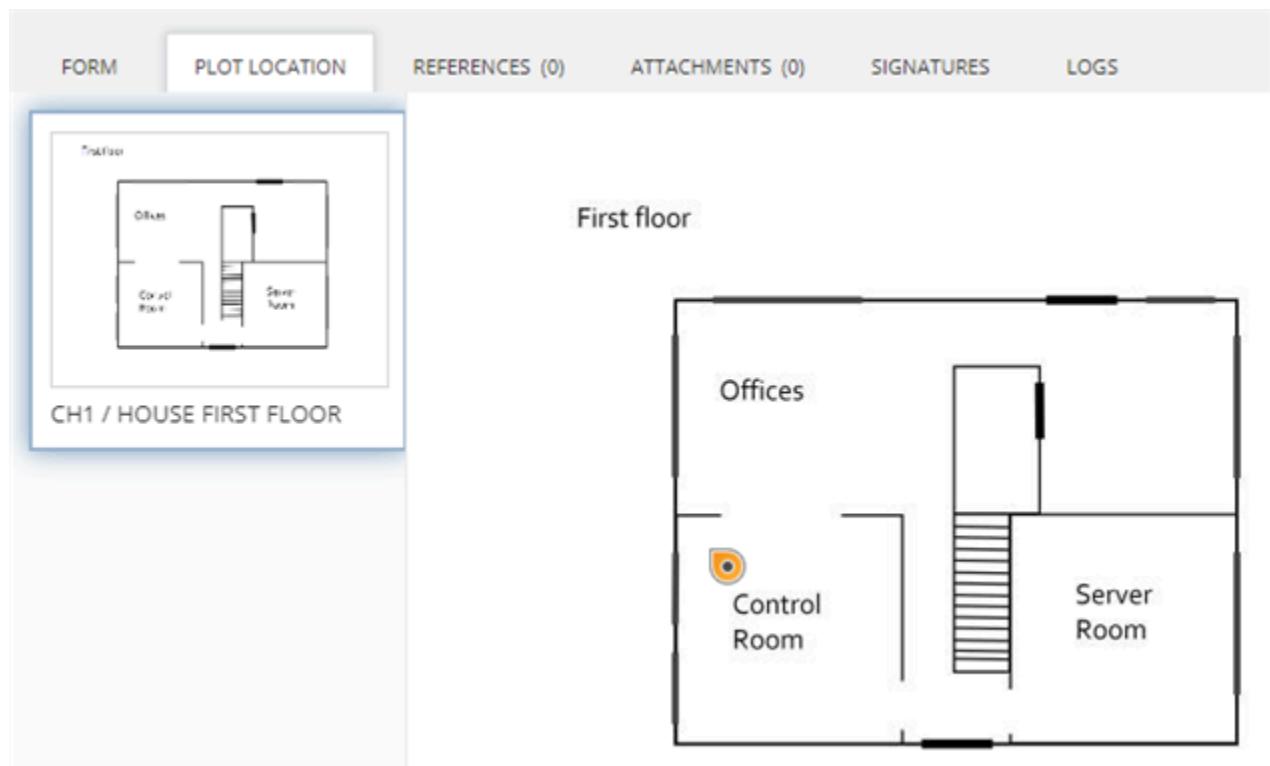
You can add and edit plot locations for a work permit from the work permit itself. The work permit must be in *Editable* status to edit.

Add a plot point

1. Open a work permit, and click the **Plot Location** tab.
2. Locate the relevant drawing, then press **Ctrl+Click** on the drawing to add a point.
3. Enter the **Altitude in meters**. This is the vertical height on this level between floor and ceiling where the work will take place.
4. Click **Apply**.



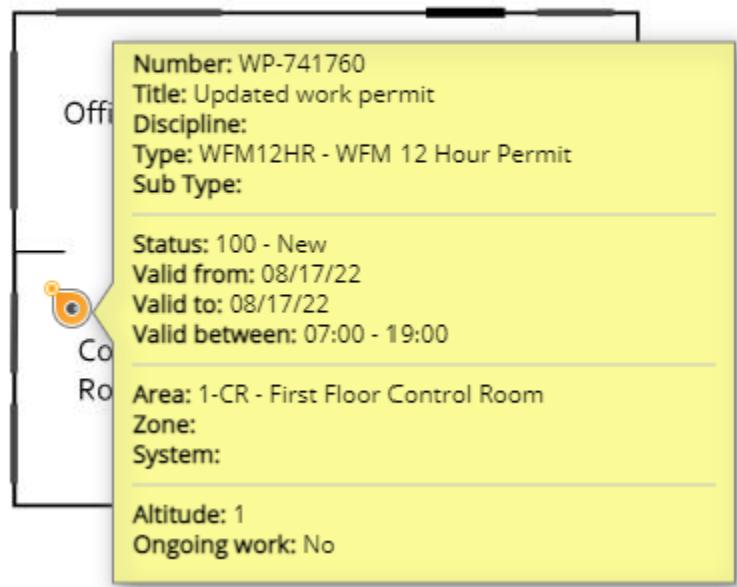
The location is plotted.



5. Click **Save changes**.

Details from the work permit will be visible with the point.

First floor



Edit a plot point

1. If work permit is in *Editable* status, click on the plot to edit the altitude of a plot location.
2. Click **Save plot**.
3. Click **Save changes**.

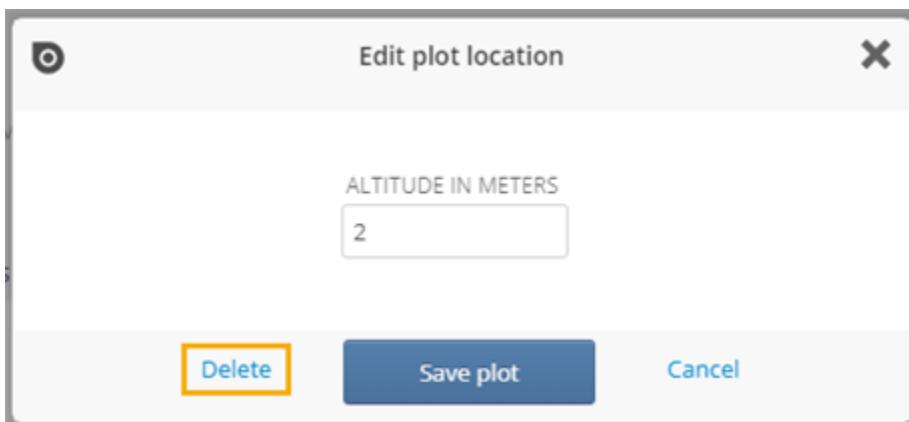
Delete a plot location

Delete a plot point

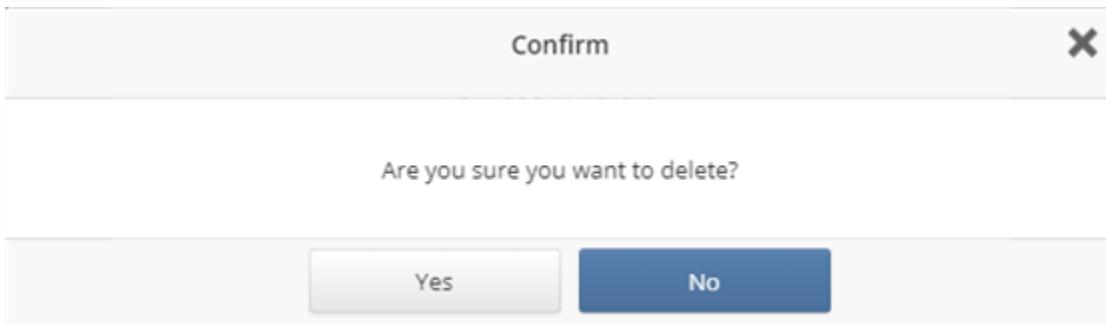
1. Open a work permit, and click the **Plot Location** tab.



2. Locate the relevant drawing and find the plot point.
3. Click the plot point to open the edit dialog box.



4. Click **Delete**.
5. On the confirmation dialog, click **Yes**.



6. Click **Save changes**.

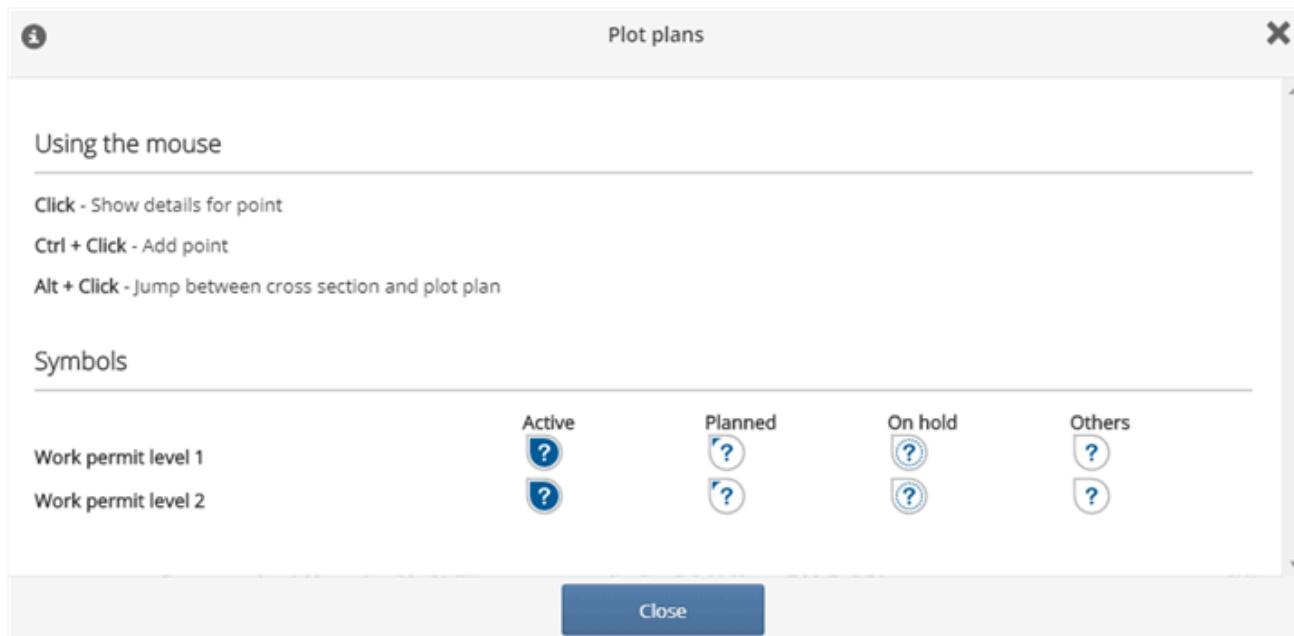
View symbol legend

Symbols

You can see the details regarding the various status groups and corresponding icons.

View symbol legend

- Click the Legend  icon.



References

References tab

On the **References** tab, you can see all the attached references for the work permits.

- Manage references for work permits
- Add a reference to a work permit
- Add competencies to a work permit

Manage references for work permits

On the **References** tab, you can add, view, and remove related items that are linked to the work permit.

Guidelines

- You can add references when work item is in editable status.
- References to be added cannot be in *Canceled* or *Closed* status.
- If work item is cancelled, all references will be removed.
- You can remove linked references when work item is in editable status.
- For some reference types, you can perform the workflow directly from References page.

Log entry for deleted read-only references

When you delete a link to read-only reference, there is now a log entry for this action. This applies for all reference types for the following work items:

Work Permit, Isolation Plan, Isolation List, Task Risk Assessment, Safe Job Analysis and Supplementary Form.

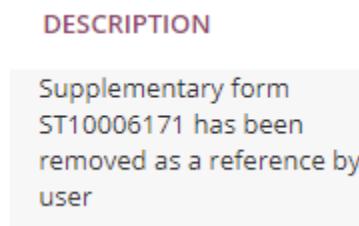
OSM makes a log entry only if the work item is in non-editable state (such as after approval). When the work item is in an editable state, there is no log entry.

- If both items are editable - no log entry
- If one item is non-editable - creates log entry
- If both items are non-editable - creates log entry

The log entry happens on both sides—on the work item side and on the reference side.

Why. Because if there is an audit, there is a record of previous associations between work items, even if these items have been removed.

Example—An example of log entry for a deleted reference.



Sections

The References tab has these sections.

- **Risk assessments.** Search for and add [Risk Assessments](#). You can create a risk assessment from here.
- **Safe job analyses.** Search for and add [Safe Job Analyses](#).
- **Isolation lists.** Search for and add [Isolation Lists](#).
- **Supplementary forms.** Search for and add [Supplementary Forms](#). You can create a supplementary form from here.
- **Competencies.** Search for and add a competency. Add workers for the competency.
- **Collections.** Search for and add [Collections](#). Create and add a collection from here.
- **Tags.** Search for and add tags.

FORM PLOT LOCATION REFERENCES (2) ATTACHMENTS (1) SIGNATURES LOGS

- > Risk assessments (0)
- > Safe job analyses (0)
- > Isolation lists (0)
- ▼ Supplementary forms (1) 

 Search (min. 3 chars.) in several fields

STATUS	NUMBER ▲	TITLE
 New	WFM-1-0004381	Form 1

- > Competencies (0)
- > Collections (0)
- > Tags (0)
- ▼ Duplicated to (1)

  STATUS	NUMBER ▲	TITLE
 New	WP-743402	

Icons

These icons appear on the References tab.

Icon	Description
	Performs a process change that moves the item from one status to another status in the workflow.
	Deletes the reference

Add a reference to a work permit

Reference sections

Depending on the type of work item, you can add different references to the work item.

Section titles show the number of attached references, such as (2) and an icon for lowest status indicator.

Add a reference

1. On the **References** tab, expand the relevant section.
2. Enter at least 3 characters into the Search bar and click the **Search**  icon.
3. Select an item from the search results.
4. Click **Save changes**.



Supplementary forms (1)				
form				
Number	Title	Valid from	Valid to	Type
CF0004758	USPP_Form			CUSTFORM
CF0004751	SUPP_FORm			CUSTFORM

Delete a reference

- Click **Delete**  next to the reference. The Delete option availability depends on the current status of the work item.

Status indicator icons

There are seven key phases, shared by all entities, that are identified and will be given the relevant color symbol.

Icon	Phase	Examples of statuses
	New	New
	In planning	For approval
	Approved	Approved, In execution
	Active	Active, Active extended

Icon	Phase	Examples of statuses
	Inactive	<i>On hold, Expired</i>
	Closed/Completed	<i>Completed, Closed</i>
	Canceled	<i>Canceled</i>

Add competencies to a work permit

Adding competencies

Some work permit types and subtypes will be linked to a competency.

Competencies are available under the **Competencies** section on the **References** tab. You can select a needed competency and then select a worker for that competency.

A *Competency* is a specific licensed skill or qualification that is necessary to do a job.

Guidelines

- Workers that are associated with each competency is configured in the system.
- The competency for a given worker has an expiration date.
- The default selected worker for a competency will be the applicant user, if applicant user is one of the associated workers. This applies only as long as the competency has not expired.
- If the applicant user is not associated to the competency or if the competency has expired, there is no default person selected.

Associate a competency with a work permit

- On the **References** tab, expand the **Competencies** section.
- In the Search bar, you can search for an existing competency.
- Select a competency from the search results.
- Click the drop-down arrow next to **Worker** to choose a worker in the competency.

CODE ▾	NAME	DESCRIPTION	WORKER	SIGN ON BEHALF OF
HPV	High Power Voltage		Thor Arnold	

Attachments

Manage attachments for work permits

The **Attachments** tab contains a list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

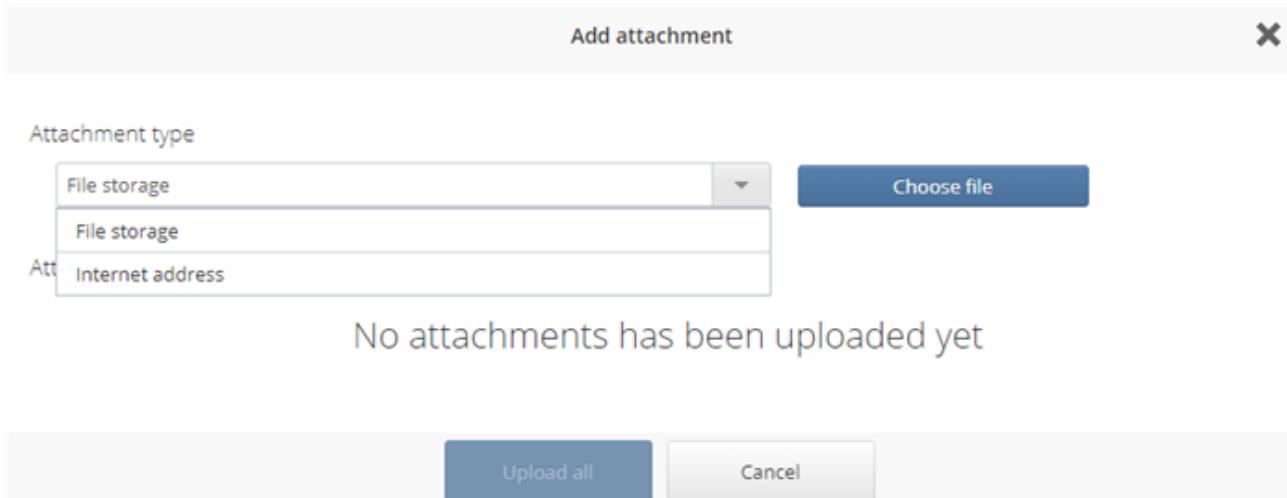
- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



The screenshot shows the 'Add attachment' dialog box. At the top, there's a title bar with 'Add attachment' and a close button. Below it is a section labeled 'Attachment type' with a dropdown menu. The 'File storage' option is selected. To the right of the dropdown is a blue 'Choose file' button. Below this section, a message says 'No attachments has been uploaded yet'. At the bottom of the dialog are two buttons: a blue 'Upload all' button and a grey 'Cancel' button.

4. If you are adding a URL, enter the URL, and click **Add web link**.

Add attachment X

Attachment type

Internet address ▼

Enter URL

www.weatherstation.org.nz

Attachments ready to be uploaded

No attachments has been uploaded yet

Upload all Cancel

5. When you have finished adding files or URLs, click **Upload all**.

FILE NAME	DESCRIPTION	ADDED BY	ADDED	
Attachment 1.pdf	Attachment 1		08/18/22	
Attachment 2.pdf	Attachment 2		08/18/22	
www.weatherstation.org.nz			08/22/22	

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.

Icon	Description
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

Signatures

View signatures for work permit

Signatures tab

The **Signatures** tab contains all the signatures that have been applied to the current item. This is a read-only page.

Note: It is not possible to enter signatures through this page. Signatures are dynamic and are part of Workflow process.

Sometimes, this page may have the option to revoke signatures.



The screenshot shows a user interface for managing signatures. At the top, there are tabs: OVERVIEW, REFERENCES (0), ATTACHMENTS (0), SIGNATURES (selected), and LOGS. A yellow banner at the top right states: "All signatures are signed as part of workflow". Below the tabs, there is a table with columns: ROLE, PROCESS, SIGNED BY, SIGNED, and SIGN ON BEHALF OF. One row is visible: "Operator responsible" under ROLE, "1.Approve" under PROCESS, "Thor Arnold" under SIGNED BY, "30/01/20 12:49" under SIGNED, and a "Revoke" button under SIGN ON BEHALF OF.

Logs

View logs and snapshots for work permits

Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes  and snapshots .

- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a

snapshot that was taken at the time an item was Approved.

- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the Logs tab, click **View All, Processes, or Snapshots** to change the filter.

DATE	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS	DESCRIPTION
20/05/20 03:09		Approve	100 - New	200 - Approved	
20/05/20 03:09			-	-	Snapshot of form created after process "Approve" was performed
20/05/20 03:09			-	-	Snapshot created after process "Approve" was performed
16/04/20 12:32			-	-	Created

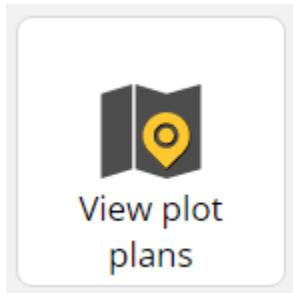
Icons

These icons appear on the Logs tab.

Icon	Description
↻	A process change that moved the item from one status to another in the workflow process.
📷	Data snapshot - View a snapshot of unformatted data at a specific time.
📸	Form snapshot - View a snapshot of the form with data at a specific time.

Plot Plans

This section contains topics that relate to plot plans.



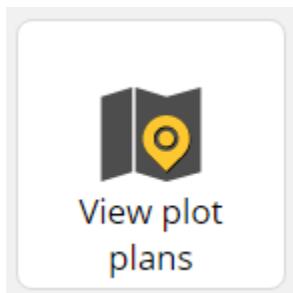
View plot plans

What is a plot plan?

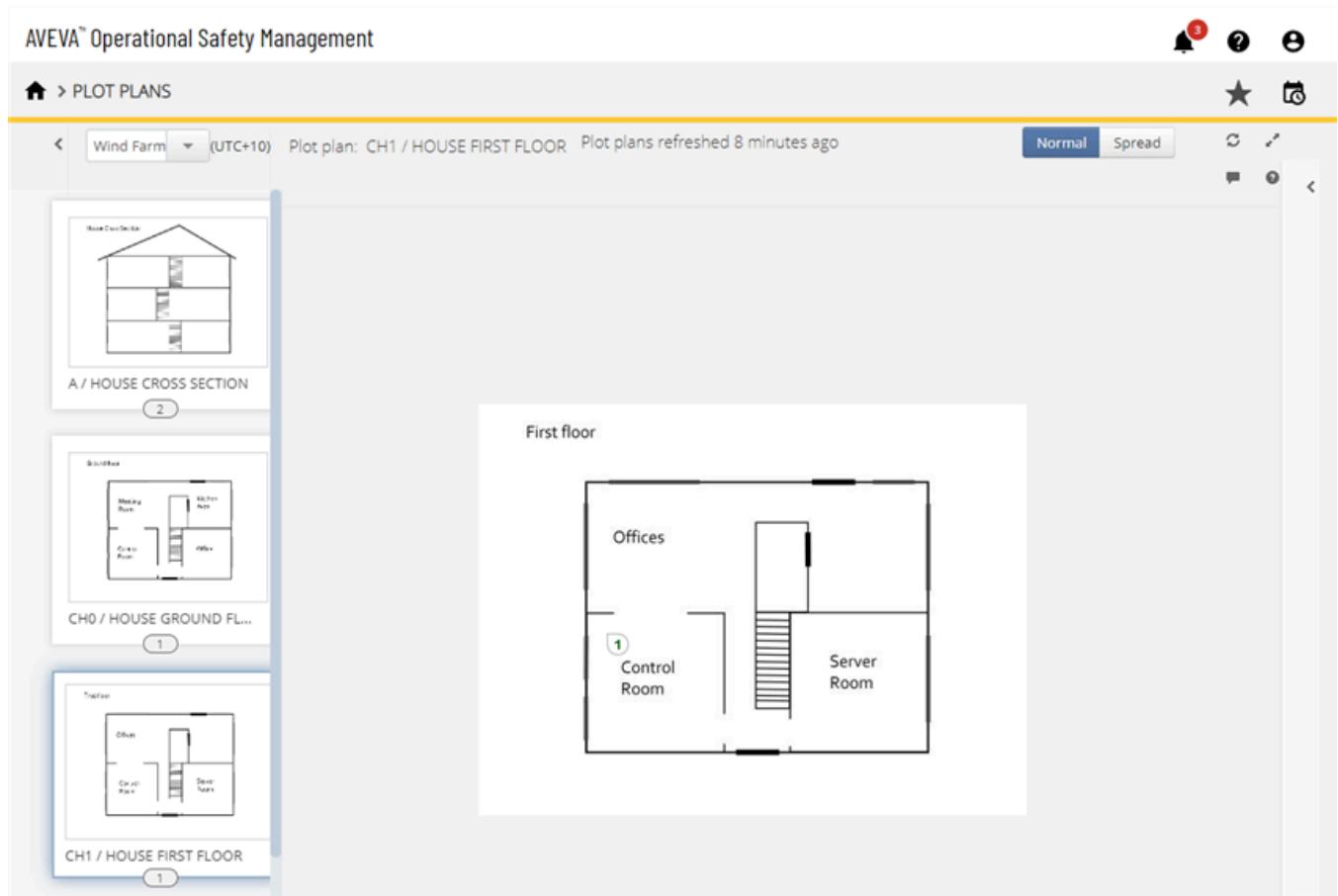
A plot plan is an architecture or engineering plan drawing that typically shows buildings, utilities, and equipment layout of a site. Plot plans are also known as site plans. Plot plans are used by Work Permits to show a plotted point for all Work Permits in an area.

View plot plans

On the Home page, click the **View Plot Plans** tile.



The Plot Plans page opens, where you can browse through the list of configured plot plans configured for the location.



Change the location

Click the drop-down arrow and select a site from the list.

SWS - AVEVA Demo Site	
Code	Name
EL	East Location
NL	North Locat...
SL	South Locat...
SWS	AVEVA Dem...
WL	West Locati...

Yellow notes

When you hover the mouse over a plot icon, a yellow note displays that contains main details about the work permit.

Number: WP-741760	
Title: [REDACTED]	
<hr/>	
Discipline:	
Type: 12HR - 12 Hour Permit	
Sub Type:	
<hr/>	
Status: 100 - New	
Valid from: 17/08/2022	
Valid to: 17/08/2022	
Valid between: 07:00 - 19:00	
<hr/>	
Area: 1-CR - First Floor Control Room	
Zone:	
System:	
<hr/>	
Altitude: 1	
Ongoing work: No	

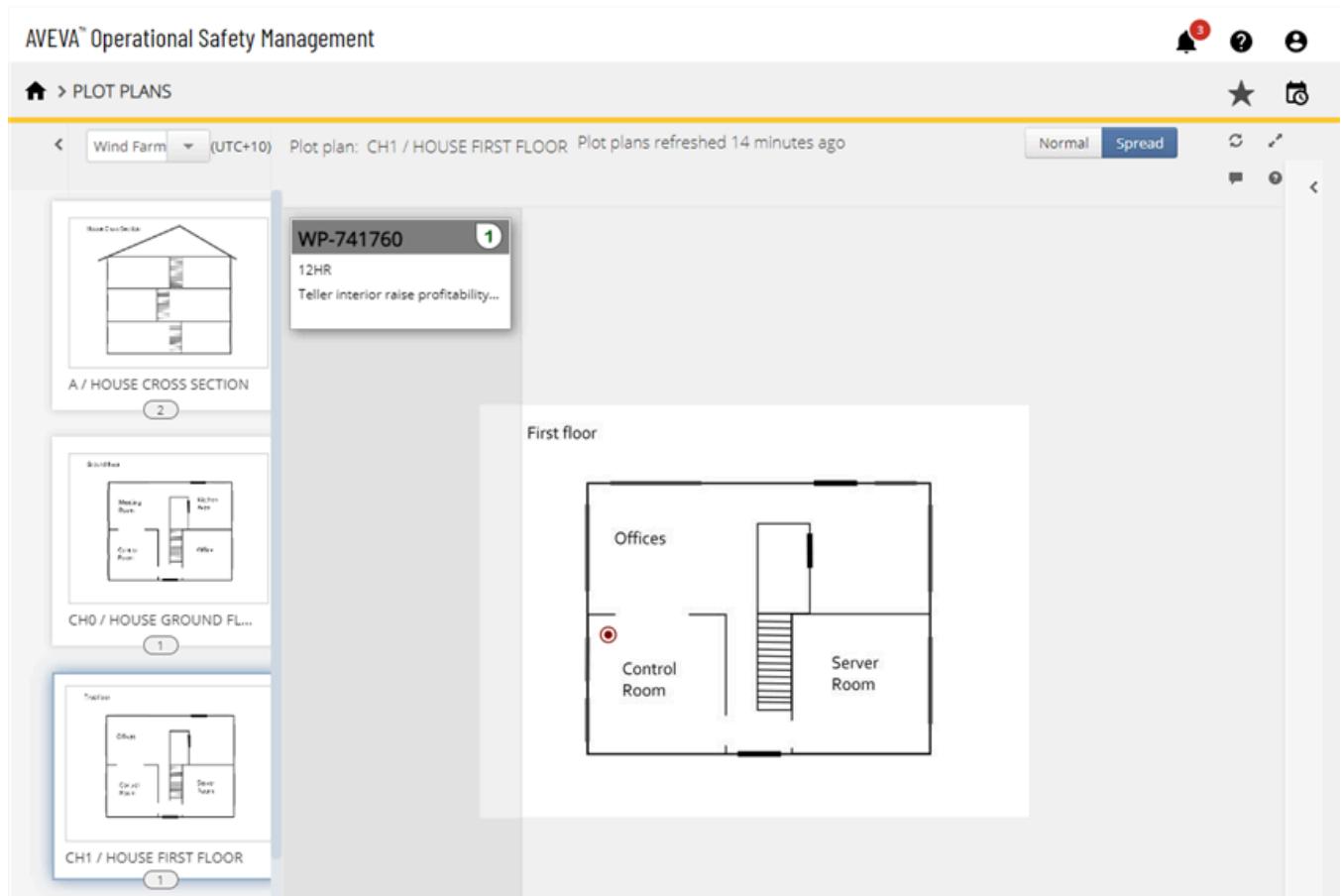
Switch views on plot plan

Switch Views

In the header for the Plot Plans page, you can switch the view mode to either **Normal** or **Spread**.

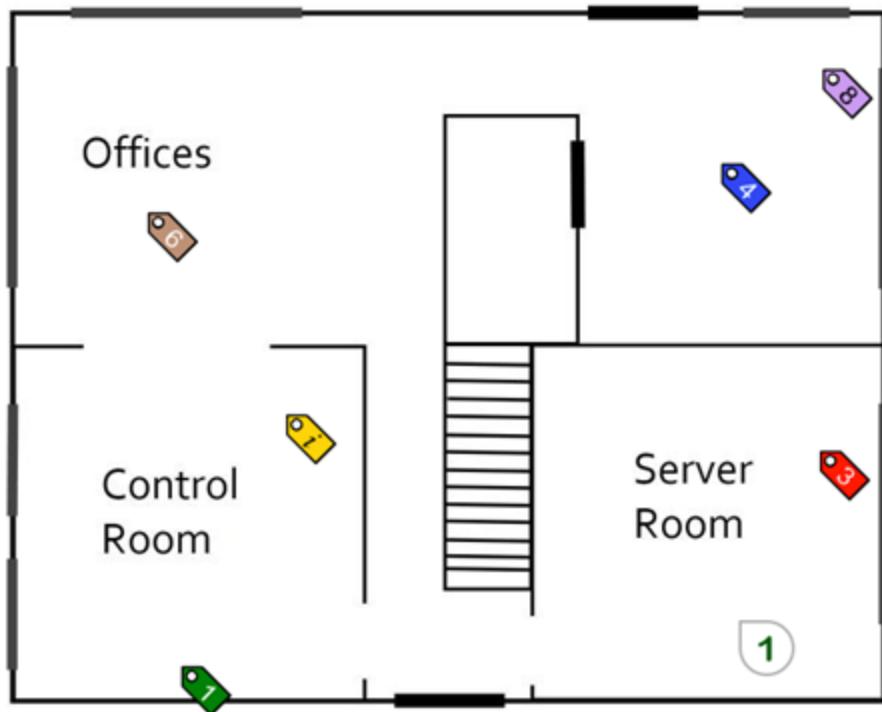
- **Normal.** Shows the plot points without any extra information. To see work permit details of a point, click the icon to open a details window.
- **Spread.** Shows the plot points with linked information boxes about the work permit point.





Create information points

You can create information points on a plot plan to store some extra information about the current plot plan. The new point appears on the plan with a colored tag, depending on type of information point.



Add a new information point

1. Press **Ctrl+Click** on the plot plan to add an information point.
2. Enter the description and details. Items with a blue star are required.
3. Click **Add plot**.
4. Click **Add changes**.

The screenshot shows a modal dialog titled "Create new" for creating a new information point. The dialog has the following fields:

- Number:** [To be generated] Active
- Description ***: Alarm
- Responsible:** Arne Beyer
- Type ***: ALARM - Alarm system
- From:** 07/09/2023 **To:** 08/09/2023
- Altitude in meters ***: 0
- Tag:** Search tag (min. 3 chars.) in several fields

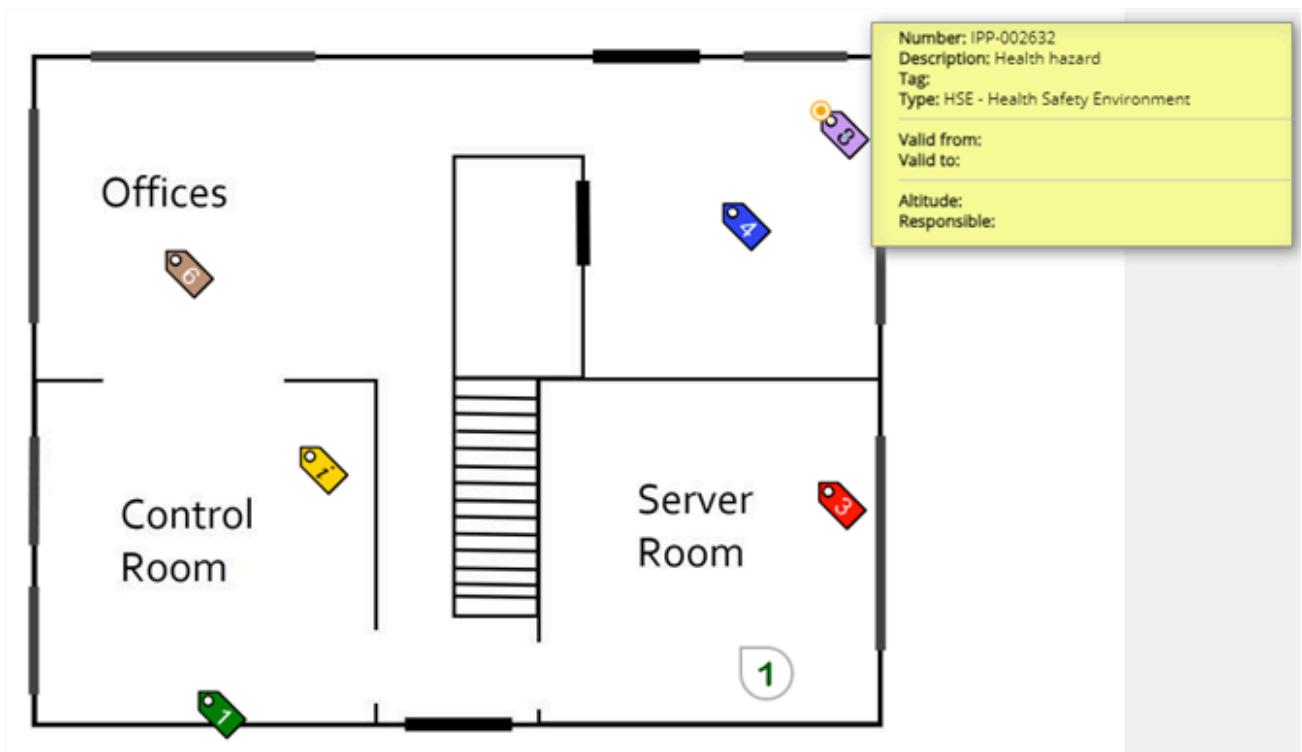
At the bottom of the dialog are two buttons: **Add plot** (blue) and **Cancel**.

Enable or disable information points

You can enable or disable information points on the plot plan.

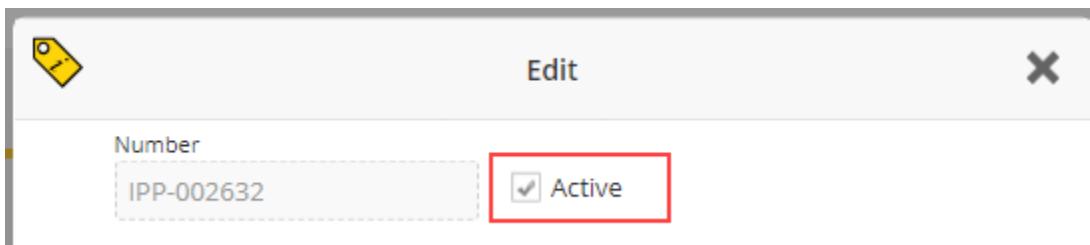
Enable an information point on plot plan

1. Hover over the information point and click the colored tag.



The Edit panel opens.

2. Select the **Active** checkbox.

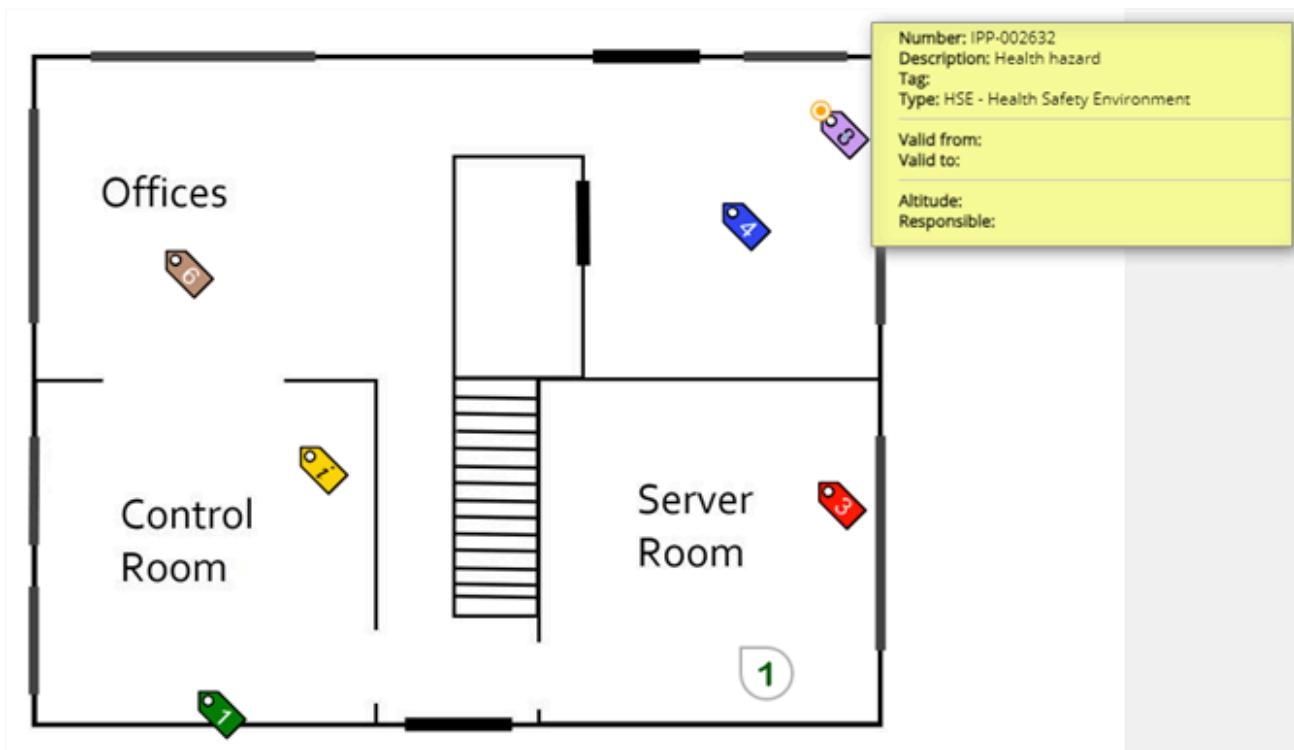


3. Click **Apply**.

4. Click **Save changes**.

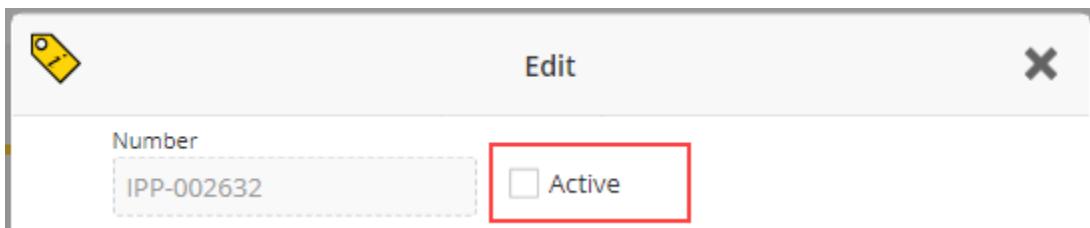
Disable an information point on plot plan

1. Hover over the information point and click the colored tag.



The **Edit** panel opens.

2. Clear the **Active** checkbox.



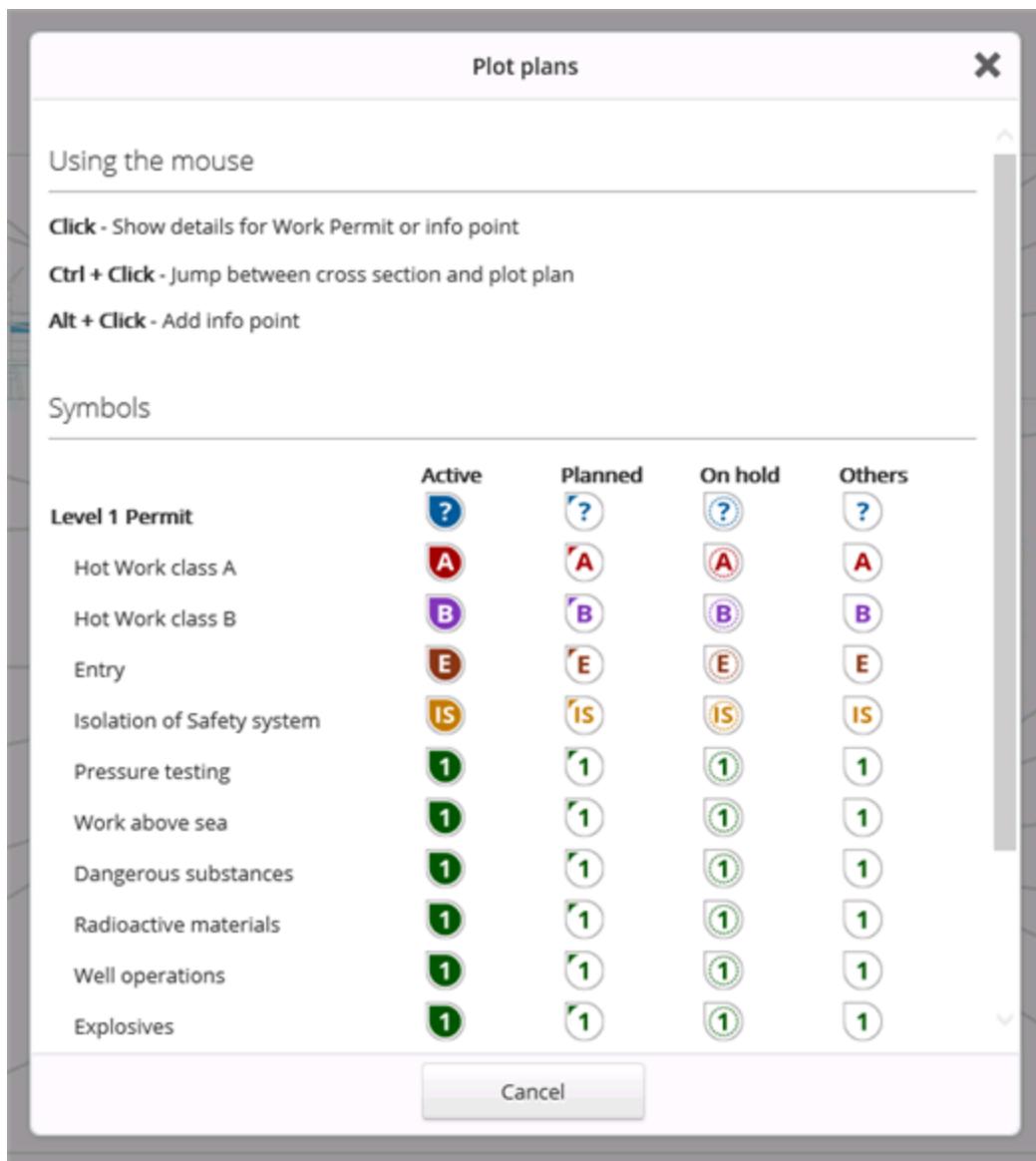
3. Click **Apply**.
4. Click **Save changes**.

Plot icons

There are plot icons for different work types. These can be configured for your particular system by an administrator.

Open icon information panel

- Click the **Information** icon  in the plot location header.



Search work permits in plot plans

Search for work permits in plot plans

- On the Plot Plans page, click the arrow icon to open the Search panel.

Period

Select current shift or next shift. You can also specify dates or specify a range of shifts.

- If you select **Date**, enter the dates to search between.
- If you select **Shifts**, you can specify a range of shifts that the work permits should be valid for. This gives the possibility to search for an isolated range of shifts in the future. Enter numeric values in the **From** and **To**

fields. Values can be from 1 to 28, where 28 is 14 days work length.

Period Reset

Current shift Next shift
 Dates Shifts 1 2

Status

- Specify the status of the work permits to include.

Status

100 - New
 150 - For approval
 200 - Approved
 300 - Active
 310 - Active extended
 350 - Inactive
 400 - Expired
 500 - On hold
 600 - Completed
 800 - Closed
 900 - Cancelled

Type

- Choose the work permit type and sub-types.

Type

L1STD - Level 1 Standard English
 L2STD - Level 2 Standard English
 L2STD - NIGHT - Level 2 Standard English
 SUBTYPES-L1 - Level 1 - Sub Types

Area, Zone, System

- Choose the **Area, Zone, System** of Work permits to include. Selections appear below inside in a blue box.

Area

Select/search in code and name 

General Area (no zones) 

Zone

Select/search in code and name 

System

Select/search in code and name 

LOADING 

Applicant, Created by, Created

- Choose the **Applicant**, **Created by**, and **Created** dates of Work permits to include. Selections appear below inside in a blue box.

Applicant

Search for part of the name

Created by

Select user / search in user name 

Created

dd/mm/yyyy - dd/mm/yyyy

Show information points

- Select **None**, **Active**, or **All** to specify which information points to display.
- (Optional) You can specify **Type of points** to display. Enter a code or name into the search box. Selections appear below inside in a blue box. Multi-select is allowed.

The screenshot shows a search interface for work permits. At the top, there is a section labeled "Show information points" with a "Reset" link and three radio button options: "None", "Active", and "All". The "All" option is selected. Below this is a section labeled "Type of points" with a "Reset" link and a search bar containing "Search in code and name" with a magnifying glass icon. Underneath the search bar are two categories: "Alarm system" and "Health Safety Environment". The "Health Safety Environment" category is highlighted with a blue border.

3. Click **Search** to display work permits with the given parameters on the current plot plan.

View activity feed of recent work permits

Use the Activity feed panel to see the most recent work permits processed on the currently selected location.

View recent work permits

1. On the Plot Plans page, click **Activity Feed**  on the panel toolbar.
2. Select **View details** link or **Open**.

Activity feed

- PTW-0000385 26.11.15 13:30
Inspection of internal...
Status: Active
[View details](#) [Open](#)
- PTW-0000384 26.11.15 11:24
Full check of mud pump A
Status: Active
[View details](#) [Open](#)
- PTW-0000381 26.11.15 11:23
Videoinspection of rin...
Status: For approval
[View details](#) [Open](#)
- PTW-0000382 26.11.15 11:22
Painting crane cockpit
Status: For approval
[View details](#) [Open](#)

Refresh of plots

Refresh settings for plot plans

There are several refresh settings that you can set for plot plans. You'll find these in the **Settings** menu item under your name.

Specify the rollover rate

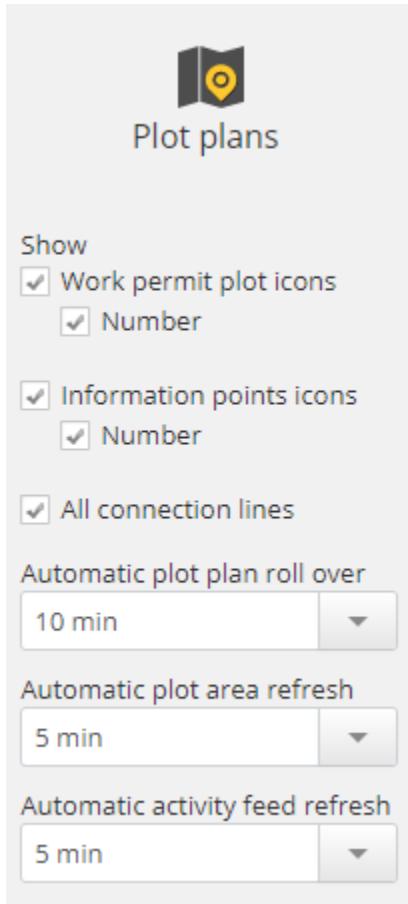
- On the [Settings page](#), under **Plot Plans**, set the **Automatic plot plan rollover** rate. You can select *Off*, *1 min*, *3 min*, *5 min*, *10 min*. This enables automatic rotation of the plot plans at the rate you set.

Specify the plot area refresh rate

- On the [Settings page](#), under **Plot Plans**, set the **Automatic plot area refresh** rate. You can select *Off*, *1 min*, *3 min*, *5 min*, *10 min*. The plot plan area will automatically refresh at the rate you set.

Specify the activity feed refresh rate

- On the [Settings page](#), under **Plot Plans**, set the **Automatic activity feed refresh** rate. You can select *Off*, *1 min*, *3 min*, *5 min*, *10 min*. The activity feed will automatically refresh at the rate you set.



Zoom level behavior

Zoom level behavior for plot plans

The zoom level when you click on a plot plan is determined by configuration settings.

Default behavior

The default configuration is that the first click on a plot plan will render in the default zoom level for the site. If you change the zoom level, this new zoom level will be preserved when changing from plot plan to plot plan within the same site.

In other words, each time you click a plot plan within the same site, the software will remember your zoom level. However, if you change sites, the zoom level goes back to default zoom level for the site. Each site has its own default zoom level.

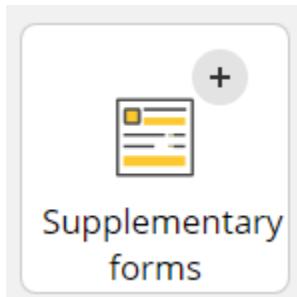
Configured behavior

It's possible that your system administrator could configure the zoom behavior to act differently.

In that case, the zoom level will not be preserved when changing plot plans. It will revert to the site default zoom level, or the plot plan default zoom level, if the plot plan has default zoom level. Each plot plan can also have a default zoom level.

Supplementary Forms

This section contains topics that relate to supplementary forms.



Supplementary Forms Library

The Supplementary Forms Library holds all of the supplementary forms for the current site. Supplementary form templates are created outside of AVEVA™ Operational Safety Management in HTML5 format and imported into the system with the OSM Administration tool.

What is a supplementary form?

A *Supplementary Form* is custom form that is created in HTML5 format and uploaded to Operational Safety Management—so that you can use the unique forms that your business requires inside AVEVA™ Operational Safety Management.

Library tabs

The Supplementary Forms library page has these tabs.

<ul style="list-style-type: none">• Browse All	The Browse All tab lists all the supplementary forms for a particular site.
<ul style="list-style-type: none">• My Work	The My Work tab shows only those supplementary forms for a particular site that are added to the current user's My Work.

- Quick filters

The **Quick Filters** are pre-configured filters that show only items that are in a particular status.

The screenshot shows the 'Supplementary forms' page. At the top right, there is a 'QUICK FILTERS' button. Below it, a horizontal bar contains five filter options: 'BROWSE ALL (12)', 'MY WORK (0)', 'NEW (10)', 'APPROVED (2)', 'ACTIVE (0)', and 'CANCELLED (0)'. The 'NEW (10)' filter is highlighted.

Browse all supplementary forms

The **Browse All** tab displays the forms in the Supplementary Form library for this site.

View details of a supplementary form

- Click a number or title to open the [details](#) tabs for the supplementary form.

Create a new supplementary form

- Click the **Add**  icon to create new supplementary form item.

The screenshot shows the 'Supplementary forms' page with two items listed:

STATUS	NUMBER	TITLE	VALID FROM	VALID TO	TYPE	SUB TYPE
 New	T10000021	Drilling F...	06/01/20	30/01/20	T1	
 New	T10000001	Drilling F...	08/01/20	10/01/20	T1	

Annotations in the screenshot point to several elements:

- Current Status**: Points to the 'New' status indicator in the first row.
- Linked Entities**: Points to a section containing icons for users, groups, and locks.
- Status Indicators**: Points to a section showing counts (0) and circular icons for each form.
- PAGE 1 OF 1**: Points to the page navigation at the bottom.

Library icons

These icons appear on the Library page.

Icon	Name	Description
	Add	Click Add icon to add a new supplementary form.
	Select	Select the checkbox to select item.

Icon	Name	Description
	My Work	Click the star icon to add the item to My Work .
	Signature	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status	Indicates the current status of the item.
	Process Workflow	Click the Workflow icon to show the available processes for the current item and select the next status.
	Options	Opens a menu of options.

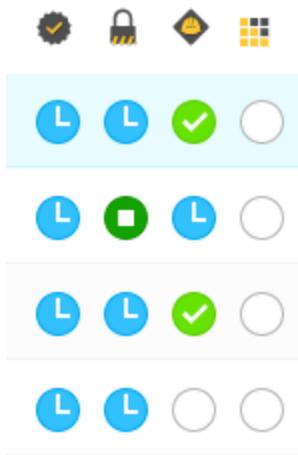
Linked entities

The icons in the right-most columns represents the linked entities to a supplementary form.

Icon	Description
	Linked work orders
	Linked work permits
	Linked risk assessments
	Linked isolation lists
	Linked isolation plans

Status indicators

The displayed status icon represents the lowest status among the linked entities. For more information, see [Status Indicator icons](#).



My Work

Add a supplementary form to My Work

- Click the **Star** icon  to add the supplementary form to [My Work](#). Click the star again to remove it from My Work.

Items with a yellow star  will appear in your My Work list .

Filtering in My Work

It's possible to further refine search criteria, but this query will not be restored next time you open My Work.

 **Supplementary forms**

QUICK FILTERS

BROWSE ALL (12) **MY WORK (3)** NEW (10) APPROVED (2) ACTIVE (0) CANCELLED (0)

+ My work (3) | Wind Farm 1 (UTC+13)

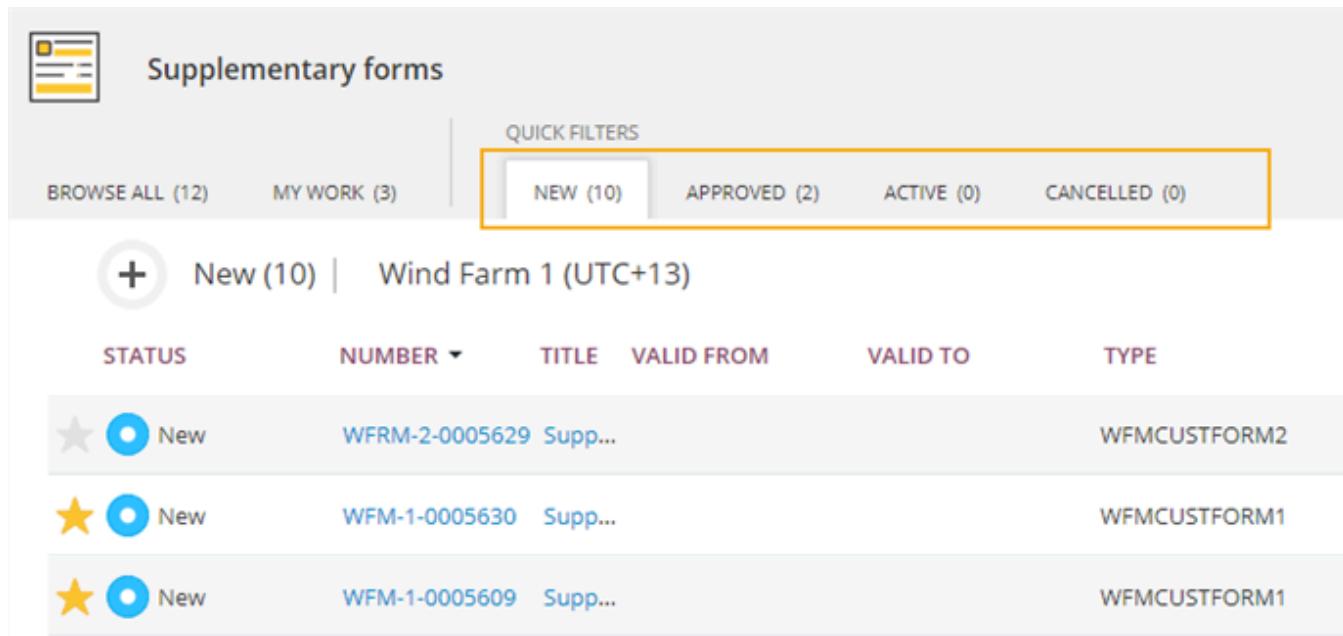
STATUS	NUMBER	TITLE	VALID FROM	VALID TO	TYPE
  New	WFM-1-0005630	Supp...			WFMCUSTFORM1
  New	WFM-1-0005609	Supp...			WFMCUSTFORM1
  New	WFM-1-0005451	Supp...			WFMCUSTFORM1

Quick filters

The **Quick Filter** tabs provide easy access to entities that have the same specified status. The statuses that display as tabs in AVEVA™ Operational Safety Management Web Application are configured by the administrator for each module.

In this example, Quick Filter tabs display for these statuses:

- *New*
- *Approved*
- *Active*
- *Cancelled*



STATUS	NUMBER ▾	TITLE	VALID FROM	VALID TO	TYPE
★ New	WFRM-2-0005629	Supp...			WFCUSTFORM2
★ New	WFM-1-0005630	Supp...			WFCUSTFORM1
★ New	WFM-1-0005609	Supp...			WFCUSTFORM1

Work with supplementary forms in Library

- Setting up supplementary forms
- Create new supplementary form
- Fields on Create New Supplementary Form page
- Fill out supplementary form
- Search for a supplementary form

Setting up supplementary forms

Use this list as a basic guideline for setting up your supplementary forms.

<ul style="list-style-type: none">• Create new supplementary form	Create a new supplementary form.
<ul style="list-style-type: none">• Fill out supplementary form	Enter the required fields on the <i>Create new supplementary</i> page.
<ul style="list-style-type: none">• Fields on Create New Supplementary Form page	Fill in the details on the form itself and save the form.
<ul style="list-style-type: none">• Add a reference to a supplementary form	Attach any relevant work items to the supplementary form.
<ul style="list-style-type: none">• Process Workflow on supplementary form	Perform the workflow process to change the status of the supplementary form.

Create new supplementary form

You can create a new supplementary form from the [OSM Home page](#) or from the library page.

Create from Library page

1. On the Library page, click the **Add**  button.
2. On the *Create new supplementary form* screen, enter the details. The fields with a blue star indicate required information.
For more information, see [Fields on Create New Supplementary Form page](#).
3. Click **Create new supplementary form**.

Create new supplementary form

Title *
Lifting certificate for heavy weight

Number
[To be generated]

Description
Lifting turbine blade

Site (UTC+13) *
Wind Farm 1

Type *
Wind Farm Custom Form 1

Sub Type
Heavy Lifting

Valid from
10/04/22

Valid to
10/07/22

Area
Turbine Fields North

System
Search in code and name

Created
[To be generated]

Updated
[To be generated]

Applicant *
Thor Arnold

* Required fields

Create new supplementary form **Cancel**

Fields on Create New Supplementary Form page

These are the fields for a supplementary form item. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	The title of the supplementary form.
• <i>Number</i>	The form number will be auto-generated with the prefix for the form type.
• <i>Description</i>	A description of the supplementary form.
• <i>Site*</i>	The site where the supplementary form will be used.
• <i>Valid from</i>	A start date that the form will be valid.
• <i>Valid to</i>	An end date that the form will be valid.

Field	Description
• <i>Area</i>	You can select an area of the site.
• <i>System</i>	You can specify the type of system.
• <i>Type*</i>	Select the type of supplementary form from available types.
• <i>Sub Type</i>	Select the supplementary form subtype, if required.
• <i>Created</i>	Auto-populated with date of creation.
• <i>Updated</i>	Auto-populated with date of last update.
• <i>Applicant*</i>	The name of the person creating the form. Select from the drop-down list, or click Switch to enter a name in free text.

The screenshot shows the 'Create new supplementary form' dialog box. It includes fields for Title (Lifting certificate for heavy weight), Description (Lifting turbine blade), Site (WFM1 - Wind Farm 1), Type (Wind Farm Custom Form 1), Sub Type (HL - Heavy Lifting), Valid from (16/04/20), Valid to (20/04/20), Area (Turbines Area North), Created (To be generated), Updated (To be generated), System (Select/search in code and name), Applicant (Thor Arnold), and a note for Required fields. Action buttons at the bottom include 'Create another', 'Create new supplementary form' (highlighted in blue), and 'Cancel'.

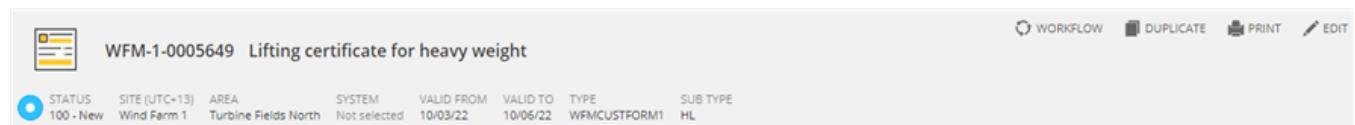
Fill out supplementary form

Form tab

On the **Form** tab, you can see the supplementary form and enter information directly into the form.

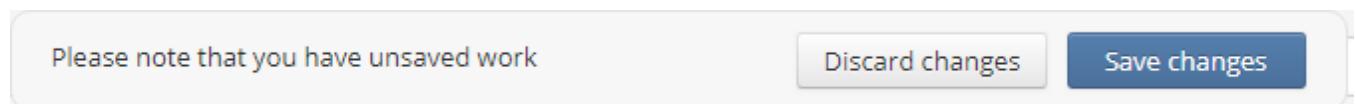
Information header

The **Information header** across the top of the screen provides details about the form and action buttons.



Enter data into the form

Type directly into the form and click **Save changes**.



Example of form

This is an example of a form for heavy lifting.

The screenshot shows a form titled "WFM-1-0005649 Lifting certificate for heavy weight". The top navigation bar includes icons for WORKFLOW, DUPLICATE, PRINT, and EDIT. Below the title, there are status details: STATUS (100 - New), SITE (UTC+13) (Wind Farm 1), AREA (Turbine Fields North), SYSTEM (Not selected), VALID FROM (10/03/22), VALID TO (10/06/22), TYPE (WFMCUSTFORM1), and SUB TYPE (HL). The main content area has tabs for FORM (selected), REFERENCES (0), ATTACHMENTS (0), SIGNATURES, and LOGS. The FORM tab displays sections for "Lifting operation" (containing "Lifting turbine blade") and "Load specification". Under Load specification, there are fields for "Weight (kg)" (250) and "Shape". There is also a "Dimensions (cm)" section with a "Dimensions..." button. At the bottom, a message says "Please note that you have unsaved work" with buttons for "Discard changes" and "Save changes".

Search for a supplementary form

You can search for a supplementary forms by supplying query parameters.

Open the Search panel

1. On the library page, click the icon on right side of the screen. The Search panel expands.
2. Select the search details and click **Search** to search for supplementary forms with the given parameters.
The search panel closes and the library list refreshes to show only forms that meet the search filter.

Reset the search query

- Click **Reset all filters** to reset the query values.



Close the Search panel

- Click to close the Search panel.

Pin the search panel

- Pin the search panel to have it always open.

See also [Supplementary form search parameters](#).

Supplementary form search parameters

Using the Search panel

This topic describes using search parameters in the search panel.

Search for a form

Search for a specific supplementary form by typing in some characters of a number, title, or description.

The screenshot shows a search interface titled 'Search Supplementary Forms'. At the top left is a back arrow icon. Next to it is a magnifying glass icon followed by the text 'Search Supplementary Forms'. Below this is a search input field containing the placeholder 'Search in number, title and description'.

Site

Click the **Search** icon to display drop-down menu of available sites.

Click **Reset** to return the filter to empty.

The screenshot shows a dropdown menu labeled 'Site'. Inside the menu, the option 'Wind Farm 1' is selected. To the right of the dropdown list is a small downward-pointing arrow icon.

Status

Select the relevant statuses to include in the search filter.

Click **Reset** to return the filter to its default state. Some statuses are configured as default by the administrator.

Status

- 100 - New
- 200 - Approval Pending
- 300 - Approved
- 400 - Active
- 800 - Closed
- 900 - Cancelled

Type and Sub type

Type

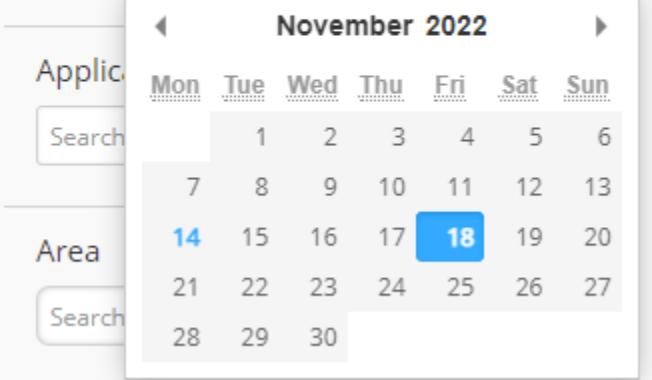


Sub Type



Valid from and Valid to

Select the start date and end date in the date range you are searching for.

Valid from	Valid to	Reset																																										
<input type="text" value="11/14/22"/>	<input style="outline: 2px solid yellow; border-radius: 5px; padding: 2px; width: 100px; height: 30px; border: 1px solid #ccc;" type="text" value="11/18/22"/>	Reset																																										
 <p>November 2022</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; text-align: center;"><thead><tr><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th></tr></thead><tbody><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td></td></tr><tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr><tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr><tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr><tr><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td><td></td></tr></tbody></table>			Mon	Tue	Wed	Thu	Fri	Sat	Sun	1	2	3	4	5	6		7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
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Other parameters

Select other query parameters. It is possible to select multiple values.

Applicant
Search in code and name

Area
Search in code and name

System
Search in code and name

Reset all filters

Details for supplementary forms

When you click on a Supplementary form in the [Supplementary Forms Library](#), you can access an overview of the details for that specific supplementary form.

Open the Supplementary form

- Click a Supplementary form in the Library.

Supplementary form tabs

Each supplementary form has several tabs containing the details about the supplementary form.

FORM	REFERENCES (0)	ATTACHMENTS (0)	SIGNATURES	LOGS
<ul style="list-style-type: none">Form	View the supplementary form and fill in details.			
<ul style="list-style-type: none">References		Link work items to supplementary form.		
<ul style="list-style-type: none">Attachments		Add attachment to the supplementary form.		

<ul style="list-style-type: none">• Signatures	View signatures for the supplementary form.
<ul style="list-style-type: none">• Logs	View logs for the supplementary form.

Supplementary forms information header

When you click on a supplementary form in the library list, you will be navigated to the details tabs. At the top of the page, there is an information header with details about the supplementary form. This includes number, title, description, status, site, and other important information for the item.

Below this header, the details of the item are distributed on different tabs.

WFM-1-0006189 Supplementary form

STATUS	SITE (UTC+13)	AREA	SYSTEM	VALID FROM	VALID TO	TYPE	SUB TYPE	DUPLICATED FROM
100 - New	Wind Farm 1	Not selected	Not selected			WFMCUSTFORM1	Not selected	WFM-1-0005609

Icons on information header

- [Status Indicator icons](#)
- [Signature icons](#)

Signature icon

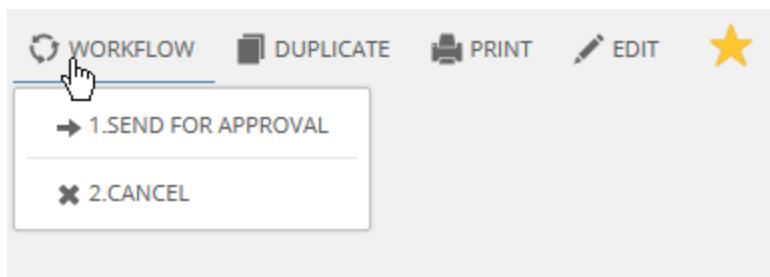
- The green pen indicates that all required signatures have been added.
- The crossed-out yellow pen indicates that signing process has started, but is not complete.



Action buttons on header

The information header contains these possible action buttons.

- [Workflow](#). Shows the available processes for the item for the current status. These processes are configurable by the administrator.
- [Duplicate](#). Creates a copy of an item.
- [Print](#). Generates a report in PDF format.
- [Edit](#). Opens to the **Edit** page where you can edit the details of the item.
- [My Work](#). Adds the item to your **My Work** list.



Process Workflow on supplementary form

The processes that you can perform will depend on the access you have in the configuration.

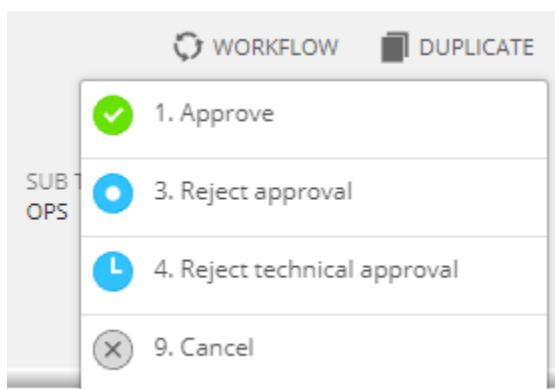
Perform workflow

1. In the Details view, click the **Workflow** icon in the upper-right corner.



A list of processes displays.

2. Select a process to perform.



The **Workflow** dialog box appears.

3. Review the [Summary](#) section that this is the operation you want to perform.
4. If signatures are required, sign in the [Signatures](#) section
5. If a message is required, write a message in the [Send to Co-worker](#) section.
6. Click **Perform process**.

The screenshot shows a workflow interface. At the top, there's a summary bar with three boxes: 'CURRENT STATUS' (blue icon, 150 - For approval), 'PROCESS' (red icon, 1. Approve), and 'NEXT STATUS' (green icon, 200 - Approved). Below this is a 'Signatures' section with three rows. Each row has a 'SIGNATURE REQUIRED' checkbox (checked for 'Area responsible', 'Operation supervisor', and 'Central Control Room'), a 'SIGNED BY' dropdown (disabled), and a 'SIGN ON BEHALF OF' dropdown (disabled). A 'Required' button is at the top right of the signatures section. At the bottom are three buttons: 'Apply signatures' (dark blue), 'Perform process' (dark blue), and 'Cancel' (light gray).

Duplicate a supplementary form

When duplicating a supplementary form, you can specify what elements of the supplementary form to duplicate.

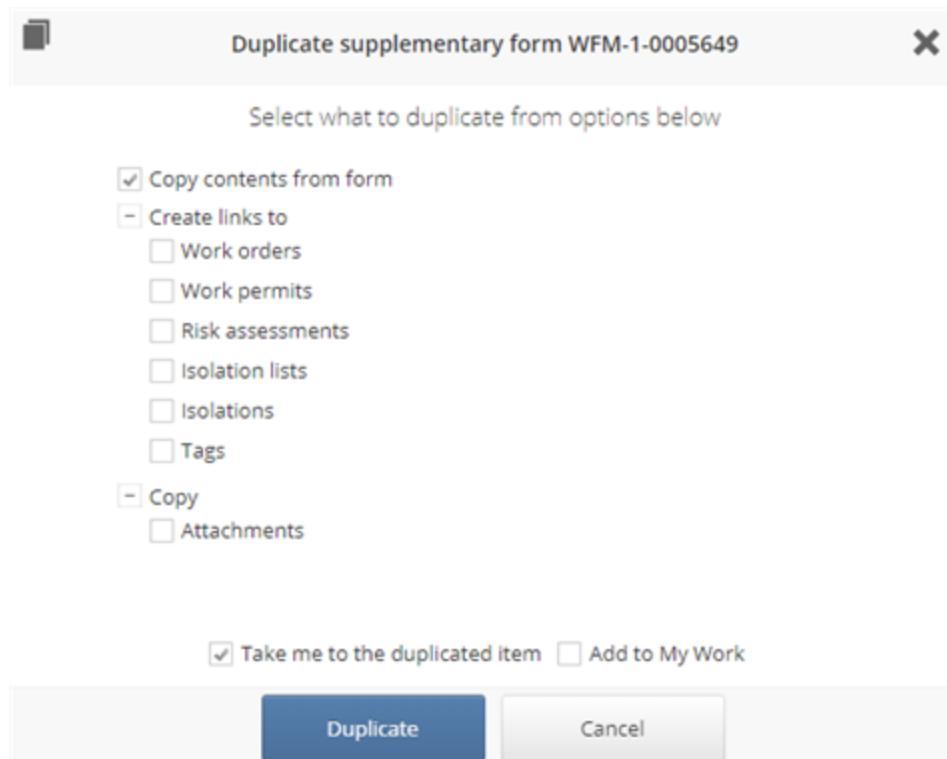
Duplicate a supplementary form

1. On the Supplementary Form library page, click the supplementary form to open it.
2. Click **Duplicate** in the information header.



The Duplicate dialog box appears.

3. Select the options that you want to duplicate and click **Duplicate**.



Print supplementary forms

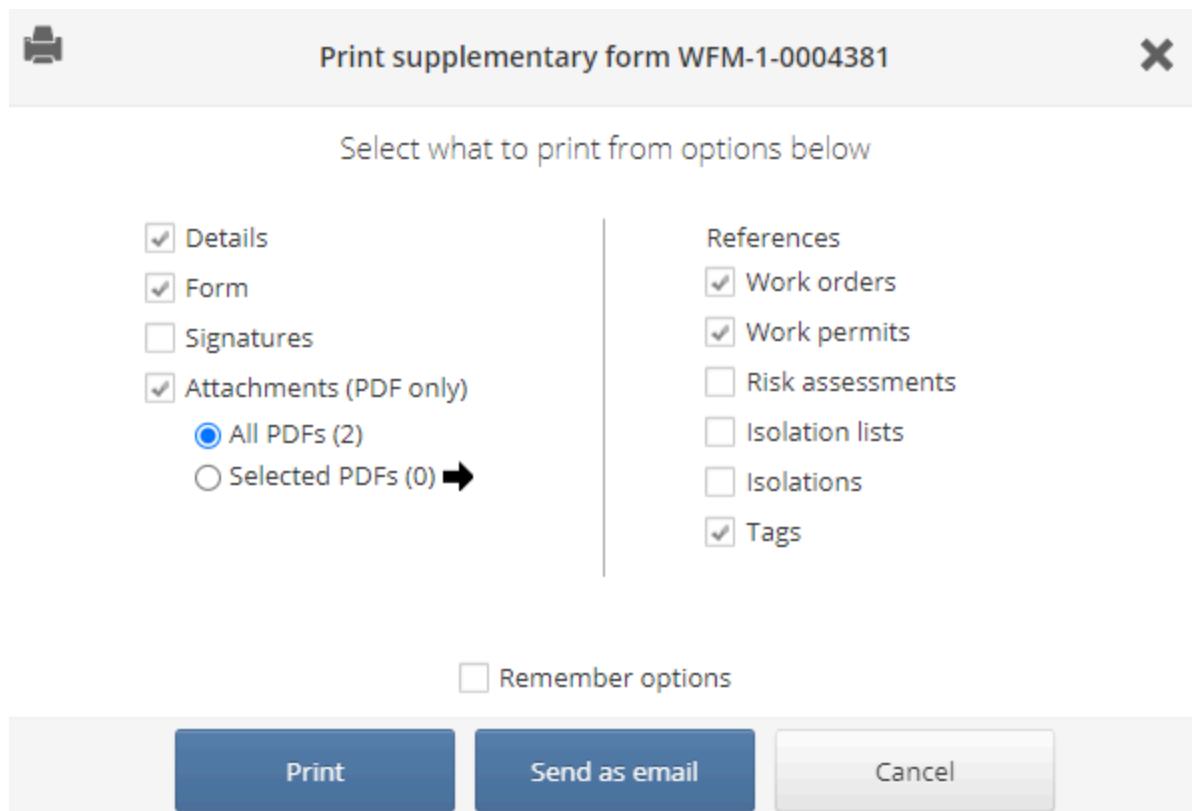
When printing a supplementary form, you are given the option to print the form, details, attachments, and linked references at the same time.

Print a supplementary form and its attachments

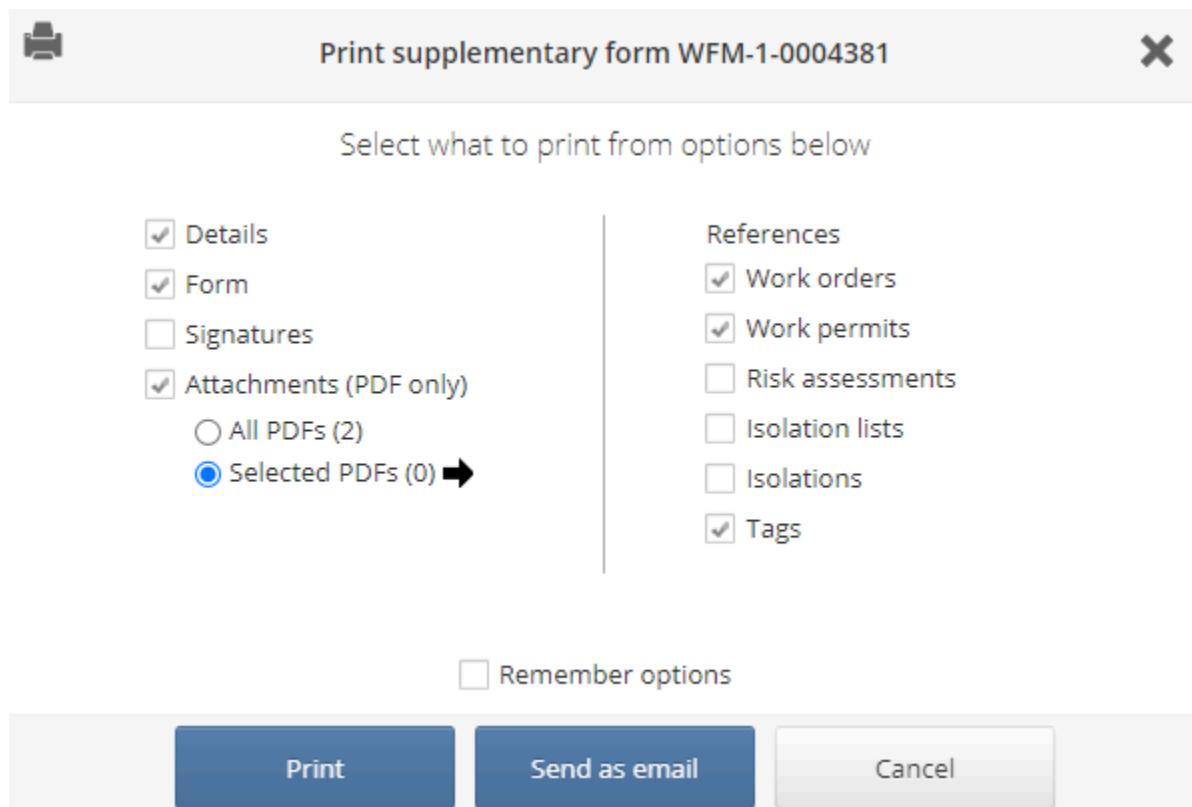
1. Open the supplementary form and click the **Print** button.



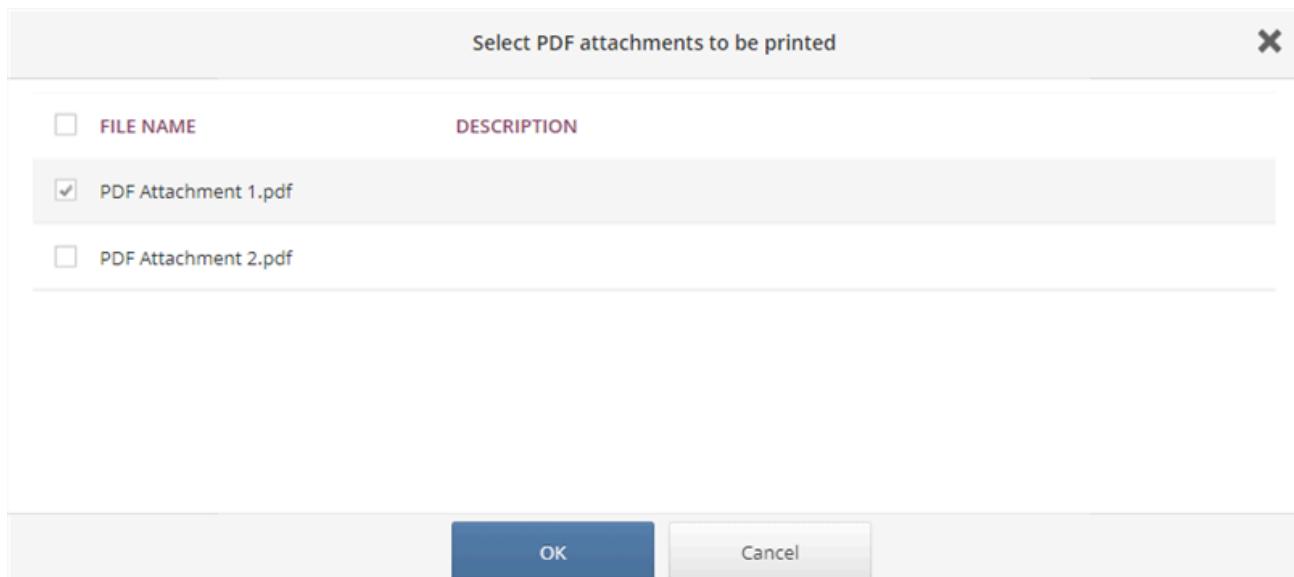
2. Select which details and linked items to print.
3. (Optional) If there is more than one PDF attachment, you can select the **Attachments** checkbox and choose whether to print all PDF attachments or select which PDFs to print.



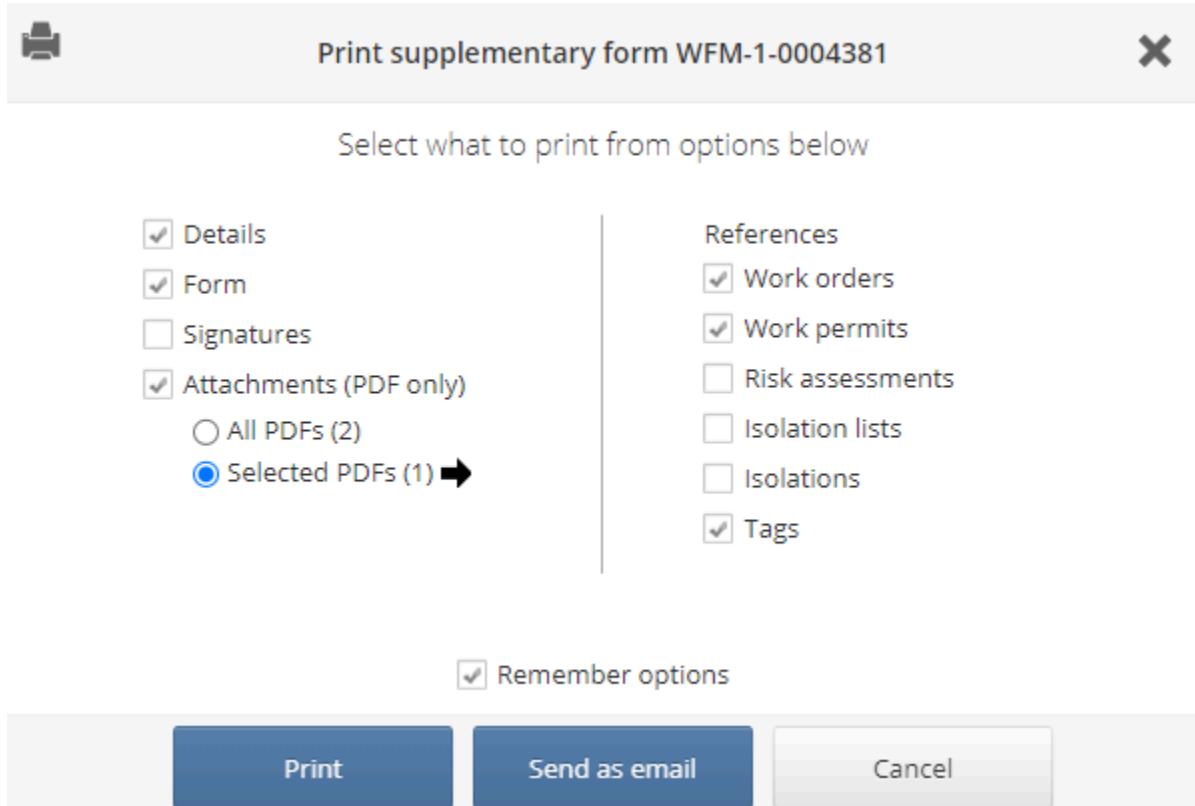
4. (Optional) Click the **Selected PDFs** option and then click the arrow ➔ icon.



5. Select the attachments you want to print and click **OK**.



6. (Optional) Select the **Remember options** checkbox to remember these print options for next time.

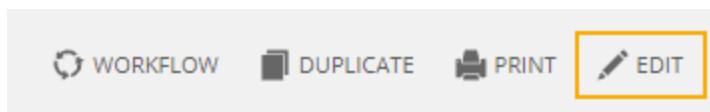


7. Click **Print**.

Edit a supplementary form

Edit supplementary form

1. In the Details view, click the **Edit** icon in the upper-right corner.



2. On the **Edit** form, edit the details. For more information, see [Fields on Edit Supplementary Form page](#).
3. Click **Save changes**.

Edit supplementary form WFM-1-0004441

Title *	Lifting certificate for heavy weight	Number	WFM-1-0004441
Description Lifting turbine blade			
Site *	WFM1 - Wind Farm 1	Type *	Wind Farm Custom Form 1
Valid from	16/04/20	Valid to	20/04/20
Area	Turbines Area North	Sub Type	Select a value
System	Select/search in code and name	Created	16/04/20
		Updated	16/04/20
		Applicant *	Thor Arnold
* Required fields			
Save changes		Delete form	Cancel

Deleting a supplementary form

The **Delete Form** button will be available only if no changes have been made.

If you process workflow or add references to the supplementary form, the **Delete Form** button will not be available on the Edit page.

Fields on Edit Supplementary Form page

These are the fields for a supplementary form item.

Field	Description
• <i>Title</i>	The title of the supplementary form. This field is editable, but it must contain a value.
• <i>Number</i>	The form number that was auto-generated with the prefix for the form type.

Field	Description
• <i>Description</i>	A description of the supplementary form.
• <i>Site</i>	In edit view, this field is read-only. It specifies the site for the supplementary form.
• <i>Valid from</i>	A start date that the form will be valid.
• <i>Valid to</i>	An end date that the form will be valid.
• <i>Area</i>	You can select an Area of the Site.
• <i>System</i>	You can specify the type of system.
• <i>Type</i>	In edit view, this field is read-only. It specifies the type of supplementary form from available types.
• <i>Sub Type</i>	In edit view, this field is read-only. It specifies the subtype of supplementary form from available subtypes.
• <i>Created</i>	Auto-populated with date of creation.
• <i>Updated</i>	Auto-populated with date of last update.
• <i>Applicant</i>	The name of the person that created the form. By default, this value is populated with your name, but you can change to another person. Select from the drop-down list, or click Switch to enter a name in free text.

The screenshot shows the 'Edit supplementary form' interface. At the top, there's a title bar with the AVEVA logo and the page title. Below it is a form with the following fields:

- Title ***: Lifting certificate for heavy weight
- Number**: WFM-1-0005649
- Description**: Lifting turbine blade
- Site (UTC+13) ***: Wind Farm 1
- Type ***: Wind Farm Custom Form 1
- Sub Type**: Heavy Lifting
- Valid from**: 10/03/22
- Valid to**: 10/06/22
- Area**: Turbine Fields North
- Created**: 10/02/22
- Updated**: 10/02/22
- System**: Search in code and name
- Applicant ***: Thor Arnold

At the bottom right, there's a note: *** Required fields**. Below the form are three buttons: **Save changes**, **Delete form**, and **Cancel**.

References

Manage references for supplementary forms

References tab

On the **References** tab, you can add, view, and remove related items that are linked to the supplementary form.

Guidelines

- You can add references when work item is in editable status.
- References to be added cannot be in *Canceled* or *Closed* status.
- If work item is canceled, all references will be removed.
- You can remove linked references when work item is in editable status.
- For some reference types, you can perform the workflow directly from References page.

Log entry for deleted read-only references

When you delete a link to read-only reference, there is now a log entry for this action. This applies for all reference types for the following work items:

Work Permit, Isolation Plan, Isolation List, Task Risk Assessment, Safe Job Analysis and Supplementary Form.

OSM makes a log entry only if the work item is in non-editable state (such as after approval). When the work item is in an editable state, there is no log entry.

- If both items are editable - no log entry
- If one item is non-editable - creates log entry
- If both items are non-editable - creates log entry

The log entry happens on both sides—on the work item side and on the reference side.

Why. Because if there is an audit, there is a record of previous associations between work items, even if these items have been removed.

Example—An example of log entry for a deleted reference.

DESCRIPTION

Supplementary form
ST10006171 has been
removed as a reference by
user

Sections

The References tab has these sections.

- **Work orders.** Search for and add [Work Orders](#).
- **Work permits.** Search for and add [Work Permits](#). You can create a work permit from here.
- **Risk assessments.** Search for and add [Risk Assessments](#). You can create a risk assessment from here.
- **Isolation lists.** Search for and add [Isolation lists](#).
- **Isolation plans.** Search for and add [Isolation plans](#).
- **Tags.** Search for and add Tags.

WFM-1-0004441 Lifting certificate for heavy weight

STATUS	ASSET	AREA	SYSTEM	VALID FROM	VALID TO	TYPE	SUB TYPE
100 - New	Wind Farm 1	Turbine Fields North	Not selected	16/04/20	20/04/20	WFMCUSTOMFORM1	HL

FORM REFERENCES (3) ATTACHMENTS (0) SIGNATURES LOGS

Work orders (1)

STATUS	NUMBER	TITLE	PRI.	DI	DUUE DATE	TC	MAIN OBJECT	Actions
Work in prog...	WO-120014	Set up a crane for work on E-06	A		19/07/20		86RWS5000	

Work permits (1)

STATUS	NUMBER	TITLE	TY	ST	AR	DI	VALID FROM	VALID TO	VALID BETWEEN	Actions
New	WP-738841	Set up crane for work on E-06	WFM...	CRL	TAE		22/05/20	22/05/20	07:00 - 19:00	

Risk assessments (0)

Isolation lists (0)

Isolation plans (0)

Tags (1)

Icons

These icons appear on the References tab.

Icon	Description
	Performs a process change that moves the item from one status to another status in the workflow.
	Deletes the reference

Add a reference to a supplementary form

Reference sections

Depending on the type of work item, you can add different references to the work item.

Section titles show the number of attached references, such as (2) and an icon for lowest status indicator.

Add a reference

- On the References tab, expand the relevant section.
- Enter at least 3 characters into the Search bar and click the icon.

▼ Work permits (1)

Search (min. 3 chars.) in several fields

STATUS	NUMBER	TITLE	TY	ST	AR	DI
Approved	WP-741062	New work permit	12H...	OPS	TAW	

3. Select an item from the search results.
4. Click **Save changes**.

Delete a reference

- Click **Delete** next to the reference. The Delete option availability depends on the current status of the work item.

Status indicator icons

There are seven key phases, shared by all entities, that are identified and will be given the relevant color symbol.

Icon	Phase	Examples of statuses
	New	<i>New</i>
	In planning	<i>For approval</i>
	Approved	<i>Approved, In execution</i>
	Active	<i>Active, Active extended</i>
	Inactive	<i>On hold, Expired</i>
	Closed/Completed	<i>Completed, Closed</i>
	Canceled	<i>Canceled</i>

Attachments

Manage attachments for supplementary forms

The **Attachments** tab contains a list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

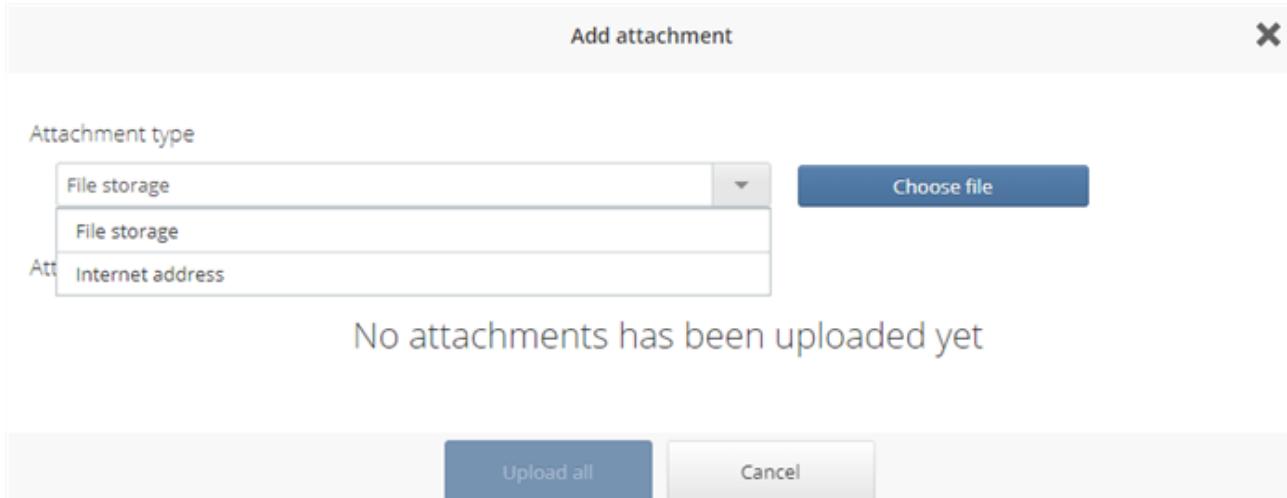
- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



The screenshot shows the 'Add attachment' dialog box. At the top, there's a title bar with 'Add attachment' and a close button. Below it is a section labeled 'Attachment type' with a dropdown menu. The 'File storage' option is selected. To the right of the dropdown is a blue 'Choose file' button. Below this section, a message says 'No attachments has been uploaded yet'. At the bottom of the dialog are two buttons: a blue 'Upload all' button and a grey 'Cancel' button.

4. If you are adding a URL, enter the URL, and click **Add web link**.

Add attachment X

Attachment type

Internet address ▼

Enter URL

www.weatherstation.org.nz

Attachments ready to be uploaded

No attachments has been uploaded yet

Upload all Cancel

5. When you have finished adding files or URLs, click **Upload all**.

FILE NAME	DESCRIPTION	ADDED BY	ADDED	
Attachment 1.pdf	Attachment 1	John Doe	08/18/22	↻ Delete
Attachment 2.pdf	Attachment 2	John Doe	08/18/22	↻ Delete
www.weatherstation.org.nz		John Doe	08/22/22	↻ Delete

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.

Icon	Description
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

Signatures

View signatures for supplementary form

Signatures tab

The **Signatures** tab contains all the signatures that have been applied to the current item. This is a read-only page.

Note: It is not possible to enter signatures through this page. Signatures are dynamic and are part of Workflow process.

Sometimes, this page may have the option to revoke signatures.



The screenshot shows a user interface for managing signatures. At the top, there are tabs: OVERVIEW, REFERENCES (0), ATTACHMENTS (0), SIGNATURES (selected), and LOGS. A yellow banner at the top right states: "All signatures are signed as part of workflow". Below the tabs, there is a table with columns: ROLE, PROCESS, SIGNED BY, SIGNED, and SIGN ON BEHALF OF. One row is visible: "Operator responsible" under ROLE, "1.Approve" under PROCESS, "Thor Arnold" under SIGNED BY, "30/01/20 12:49" under SIGNED, and a "Revoke" button under SIGN ON BEHALF OF.

Logs

View logs and snapshots for supplementary forms

Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes  and snapshots .

- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a

snapshot that was taken at the time an item was Approved.

- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the Logs tab, click **View All**, **Processes**, or **Snapshots** to change the filter.

DATE	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS	DESCRIPTION
20/05/20 03:09		Approve	100 - New	200 - Approved	
20/05/20 03:09			-	-	Snapshot of form created after process "Approve" was performed
20/05/20 03:09			-	-	Snapshot created after process "Approve" was performed
16/04/20 12:32			-	-	Created

Icons

These icons appear on the Logs tab.

Icon	Description
↻	A process change that moved the item from one status to another in the workflow process.
📷	Data snapshot - View a snapshot of unformatted data at a specific time.
📸	Form snapshot - View a snapshot of the form with data at a specific time.

Isolations

The Isolations library contains both isolation plans and isolation lists.



Isolations Library

The Isolations Library holds the [Isolation plans](#) and [Isolation Lists](#) for the current site.

What is an Isolation plan?

An isolation plan is a work plan to ensure that a certain piece of equipment has been isolated from other systems.

For example, an item of equipment has both water input and electricity input. Both of these systems need to be turned off before any work can be performed on the equipment.

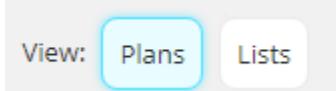
An isolation plan usually contains one or more isolation lists of different types, such as an electrical isolation list to turn off the electricity and then turn it back on after work on the equipment is complete.

What is an Isolation list?

An Isolation List is a predetermined set of sequential steps that must be followed to isolate a system that will be worked on. An Isolation List must be part of an Isolation Plan.

Switch between List and Plan views

- On the Isolations Library page, click **Plans** or **Lists** to toggle between views.



Library tabs

The Isolations library page has these tabs.

- [Browse All](#)
- [My Work](#)
- [Quick filters](#)

The **Browse All** tab displays either isolation plans or isolation lists for a particular site, depending on the selected view mode.

The **My Work** tab displays the current user's My Work isolation plans or isolation lists for a particular site, depending on the selected view mode.

These are preconfigured quick filters that show only items that are in a particular status.

The screenshot shows the 'Isolations' library page. At the top, there is a header with a lock icon and the word 'Isolations'. Below the header, there is a 'View' section with two buttons: 'Plans' (which is highlighted with a blue border) and 'Lists'. Underneath the 'View' section, there are several tabs: 'BROWSE ALL (10)', 'MY WORK (6)', 'FOR APPROVAL (1)', 'APPROVED (1)', and 'ACTIVE (4)'. There is also a 'QUICK FILTERS' section with a dropdown menu.

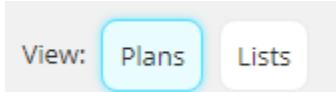
Browse all Isolations

Browse All tab

The **Browse All** tab displays all the isolation lists or Plans in the Isolations library for this location.

Switch between List and Plan views

- On the Isolations Library page, click **Plans** or **Lists** to toggle between views.



View details of an isolation plan or list

- Click a row to view the details tabs of that isolation plan or list.

Create a new isolation

- Click the Add icon to create new isolation plan.

Add an isolation to My Work

- Click the Star icon to add the isolation to [My Work](#). When an item is selected, the star turns yellow .

The screenshot shows the 'Isolations' page in the AVEVA OSM Web interface. At the top, there are tabs for 'BROWSE ALL (10)', 'MY WORK (5)', 'FOR APPROVAL (1)', 'APPROVED (1)', and 'ACTIVE (4)'. On the right, there are 'View' buttons for 'Plans' (highlighted in blue) and 'Lists'. Below the tabs is a search bar labeled 'Search Isolations' with a placeholder 'Select/search in code and name' and a magnifying glass icon.

STATUS	NUMBER	EQUIPMENT	AR	SY	DI	VALID FROM	VALID TO	Workflow Icons
★ L New	ISO-0000161	TK-0001	P10					○ L ↺
★ ➡ Active	ISO-0000142	E-0004-A	P30	41	M	20/06/18 - 00:00	20/06/18 - 00:00	● L ↺
★ ➡ Active	ISO-0000141	E-0004-A	P30	41	M	20/06/18 - 00:00	20/06/18 - 00:00	○ ➡ ↺
★ ➡ In modifica...	ISO-0000121	E-0004-B	P30	41	M	12/06/18 - 00:00	12/06/18 - 00:00	● ➡ ↺
★ ➡ In modifica...	ISO-0000081	E-0004-A	P30	41	M	05/02/18 - 07:00	05/02/18 - 19:00	● ➡ ↺
★ L New	ISO-0000063	D-0003-A	S10	20	O			➡ L ↺
★ ✓ Approved	ISO-0000062	V-0058	P30	30				● L ↺
★ L For approval	ISO-0000061	V-0058	P20			30/01/18 - 07:00	17/01/23 - 19:00	● L L ↺
★ ➡ Active	ISO-0000043	D-0003-A	P30	20	O			● ➡ ↺
★ ➡ Active	ISO-0000042	E-0004-B	P30	14	M			○ ➡ ↺

On the right side of the page, there are several filter sections: 'Alerts' (with a search bar), 'System' (with a search bar), 'Discipline' (with a search bar), 'From' and 'To' date pickers, 'Is safety equipment isolated' (radio buttons for Any, Yes, No), 'ISOLATION LISTS' (dropdown set to 'Electrical'), 'Created by' (dropdown with a search bar), 'Created date' (radio buttons for Any, Specific date, Period), and a checkbox for 'Added to My work'.

Library icons

These icons appear on the Library page.

Icon	Name	Description
	My Work icon	Click the star icon to add the item to My Work .
	Signature icon	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status icon	Indicates the current status of the item.
	Process Workflow icon	Click the Workflow icon to show all the available processes for the current item.

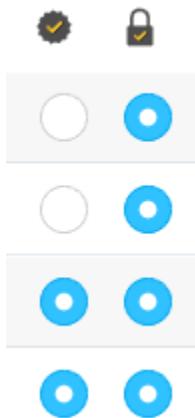
Linked entities

The icons in the right-most columns represents the linked work items to an Isolation.

Icon	Description
	Linked work permits
	Linked isolation lists (only for plans)

Status Indicators

The displayed status icon represents the lowest status among the linked entities. For more information, see [Status Indicator icons](#).



My Work

This topic relates to [Isolations Library](#).

Add an isolation to My Work

- Click the Star icon to add the isolation to [My Work](#). Click the star again to remove it from My Work.

Items with a yellow star will appear in your My Work list .

Filtering in My Work

It's possible to further refine search criteria, but this query will not be restored next time you open My Work.

STATUS	NUMBER	TITLE
New	IP-050391	Isolation of the gas pip valves
New	IP-047955	Isolate J02 Electrical Flying leads (EFLs)

Quick filters

The **Quick Filter** tabs provide easy access to entities that have the same specified status. The statuses that display as tabs in AVEVA™ Operational Safety Management Web Application are configured by the administrator per module.

In this example, Quick Filter tabs display for these statuses:

- *New*
- *Approved*
- *Active*

The screenshot shows the 'Isolations' page in the AVEVA OSM Web User Guide. At the top, there's a lock icon and the word 'Isolations'. Below that are buttons for 'BROWSE ALL (237)', 'MY WORK (2)', and 'ACTIVE (83)'. A 'QUICK FILTERS' section is also present. The main area shows a table with the following data:

STATUS	NUMBER	TITLE	EQUIPMENT
Active	IP-051062	[REDACTED]	[REDACTED]
Active	IP-051061	[REDACTED]	[REDACTED]
Active	IP-048005	[REDACTED]	[REDACTED]
Active	IP-047999	[REDACTED]	[REDACTED]
Active	IP-047998	[REDACTED]	[REDACTED]
Active	IP-047951	[REDACTED]	[REDACTED]
Active	IP-047935	[REDACTED]	[REDACTED]

Isolation plans

What is an isolation plan?

An isolation plan is a work plan to ensure that a certain piece of equipment has been isolated from other systems.

For example, an item of equipment has both water input and electricity input. Both of these systems need to be turned off before any work can be performed on the equipment.

An isolation plan usually contains one or more isolation lists of different types, such as an electrical isolation list to turn off the electricity and then turn it back on after work on the equipment is complete.

Setting up isolation plans

Use this list as a basic guideline for setting up your isolation plans.

<ul style="list-style-type: none">Create new isolation plan	Create a new isolation plan.
<ul style="list-style-type: none">Fields on Create New Isolation page	Enter the required fields.

<ul style="list-style-type: none">• Add equipment to be isolated	Add the equipment to be isolated to the isolation plan.
<ul style="list-style-type: none">• Add a reference to an isolation plan	Add related work orders and other references.
<ul style="list-style-type: none">• Create an isolation list	Add one or more isolation lists to the isolation plan. An isolation plan must have at least one isolation list.

Create new isolation plan

You can create a new isolation plan from the [OSM Home page](#) or from the library page.



Create from Library page

1. On the **Isolations Library** page, click the **Add** button.
2. On the *Create New Isolation* screen, enter the details. The fields with a blue star indicate required information.
For more information, see [Fields on Create New Isolation page](#).
3. Click **Create new isolation**.



Create new isolation

Title * Replace electrical wiring

Number [To be generated]

Description

- A brief introduction that describes the purpose of the work.
- Need for support from personnel with special competence.
- Details on which and how barriers should be set, according to the "minimum requirements when opening a pressurized system".
- Need for a specific order when establishing barriers.
- Identified risk

Site (UTC+13) * Wind Farm 1

Applicant * Arne Beyer

Area Transformer Station North

System Electric System

Discipline Search in code and name

Valid from 02/02/21 **Valid to** 03/02/21

Safety equipment isolated * Yes No

Compensating action

* Required fields

Create new isolation [Cancel](#)

Fields on Create New Isolation page

These are the fields for an isolation plan item. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	The title of the isolation plan.
• <i>Number</i>	The number will be auto-generated.
• <i>Description</i>	A description of the isolation plan.
• <i>Site*</i>	The site where the isolation will be used.

Field	Description
• <i>Applicant*</i>	The name of the person creating the plan. Select from the drop-down list.
• <i>Area</i>	You can select an Area of the Site.
• <i>System</i>	You can specify the type of system that relates to this plan.
• <i>Valid from</i>	The start date that the plan will be valid.
• <i>Valid to</i>	The end date that the plan will be valid.
• <i>Discipline</i>	You can specify which discipline is performing this plan.
• <i>Compensating Action</i>	The compensating actions that will be taken. These are actions that will be taken to reduce risks during the work procedure.
• <i>Safety equipment isolated*</i>	Select Yes if equipment is to be isolated. You must select Yes or No.

Add equipment to be isolated

Use the Search bar to search for and add tags for pieces of equipment to be isolated.

Search for tags

1. Enter at least 3 characters and press Enter or the **Search** icon .

Equipment to be isolated



Search tag (min. 3 chars.) in several fields



AVEVA™ Operational Safety Management will search the tags in the OSM Database and return any matching tags.

2. Select tag from the search results.

Equipment to be isolated		
21a		
Name	Description	Status
PU871421A	POWER CABLE, SUPPLY A, SPCU ROLVNES, 87EC421A	Active

The selected tag appears in **Equipment to be Isolated** list.

Tags in schematics

After selecting a tag, AVEVA™ Operational Safety Management connects to AVEVA™ Asset Information Management (AIM) and searches to see if the tag is found in any schematics. Depending on whether the tag is found in any schematics in the external database, several messages can appear in the **Tag in Schematics** column.

Search results	Returned schematics IDs
If the tag is found in no schematics in AIM.	Message displays: <i>Not found in any schematics</i>
If the tag is found in 1 schematic in AIM.	Provides schematic ID.
If the tag is found in multiple schematics in AIM.	Message displays: <i>Found in several schematics</i>

Equipment to be isolated			
Search tag (min. 3 chars.) in several fields			
TC	TAG NAME	DESCRIPTION	TAG IN SCHEMATICS
13AP1079	TEST SEPARATOR GAS OUTLET		<i>Found in several schematics</i>
19LG5004	HPU SUPPLY TANK LEVEL		<i>Not found in any schematics</i>
21BL0005	SEAL FLUID FROM 21CS002		23380E-KVEST-001-P-XB-21-00006.001
21HA003A	SHELL AND TUBE HEAT EXCHANGERS		23380E-KVEST-300-P-XB-21-00003.001

Tag criticality

The color of the tag indicates the criticality level of the main item. See [Tag criticality](#).

Search isolation plans

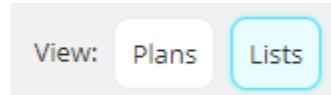
Different isolation list types can have different statuses; therefore, statuses do not show in the search filter if multiple isolation list types are selected.

You can search for a linked isolation plan and tag, which are either connected as an equipment to be isolated, or isolation point.

Search isolation plans

You can search isolations by querying for different parameters.

Tip: Switch between isolation plans and isolation lists by using the toggle buttons.



Open the Search panel

1. Click the icon on right side of the screen. The Search panel expands.
2. Select the search details and click **Search** to search with the given parameters.
The search panel closes and the library list refreshes to show only isolations that meet the search filter.

Reset the search query

- Click **Reset all filters** to reset the search query values.



Close the Search panel

- Click to close the Search panel.

Pin the search panel

- Pin the search panel to have it always open.

See also [Isolation plan search parameters](#)

Isolation plan search parameters

Using the Search panel

This topic describes using search parameters in the search panel for isolation plans.

Search for an isolation plan

Enter a minimum of three characters that appear in the number, title, or description.

> Search Isolation Plans

Search in number, title and description

Site

Click the **Search** icon to display drop-down menu of available sites.

Click **Reset** to return the filter to empty.

Site

Wind Farm 1



Status

Select the relevant statuses to include in the search filter.

Click **Reset** to return the filter to its default state. Some statuses are configured as default by the administrator.

Status

- 100 - New
- 150 - Approval pending
- 180 - Plan For technical approval
- 200 - Approved
- 300 - Active
- 400 - In modification
- 500 - Modification for approval
- 600 - Closed
- 900 - Cancelled

Area

Limit the search to a specific [Area](#).

System

Limit the search to a specific [System](#).

Discipline

Limit the search to a specific Discipline.

Valid from and Valid to

Select the Valid From and Valid To dates.

Is safety equipment isolated

Select Yes or No.

Is safety equipment isolated [Reset](#)

Yes No

Isolation Lists

Include the details of an isolation list that is associated with the isolation plan.

ISOLATION LISTS

Type of isolation list [Reset](#)

Search in code and name

Electrical

Created by [Reset](#)

Thor Arnold

Created [Reset](#)

12/03/21 - 14/03/21

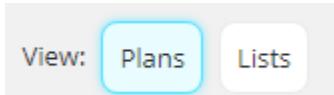
[Search](#) [Reset all filters](#)

Details for isolation plans

When you click on an isolation plan in the [Isolations Library](#), you can access an overview of the details for that specific isolation plan.

Open an isolation plan

1. On the Isolations Library page, click the **Plans** button to view only isolation plans.



2. Double-click an isolation plan to open the Details pages.

Isolation plan tabs

Each isolation plan has several tabs containing the details about the isolation plan.



• Overview	Overview of isolation plan.
• References	Add references to an isolation plan.
• Attachments	Add attachments to an isolation plan.
• Signatures	View signatures for an isolation plan.
• Logs	View logs for an isolation plan.

Process workflow on isolation plan

The processes that you can perform will depend on the access you have in the configuration.

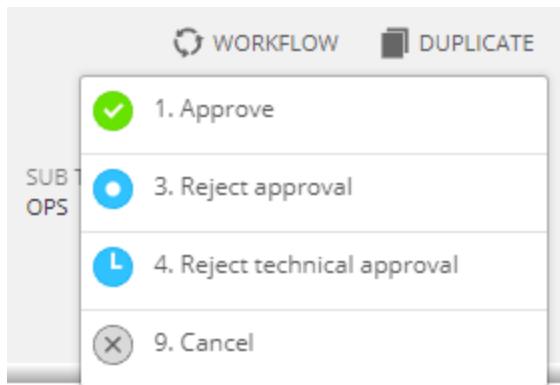
Perform workflow

1. In the Details view, click the **Workflow** icon in the upper-right corner.



A list of processes displays.

2. Select a process to perform.



The **Workflow** dialog box appears.

3. Review the [Summary](#) section that this is the operation you want to perform.
4. If signatures are required, sign in the [Signatures](#) section
5. If a message is required, write a message in the [Send to Co-worker](#) section.
6. Click **Perform process**.

The screenshot displays the 'Workflow' dialog box with two main sections: 'Summary' and 'Signatures'.

Summary: Shows the current status (150 - For approval), the process step (1. Approve), and the next status (200 - Approved).

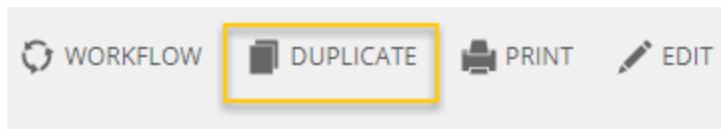
Signatures: A table for selecting signatories. It includes columns for 'SIGNATURE REQUIRED' (checkboxes for 'Area responsible', 'Operation supervisor', and 'Central Control Room'), 'SIGNED BY' (dropdown menus for each row), and 'SIGN ON BEHALF OF' (dropdown menus for each row). Buttons for 'Required' and 'Optional' are at the top right of the signatures section.

Action Buttons: At the bottom are three buttons: 'Apply signatures' (disabled), 'Perform process' (disabled), and 'Cancel'.

Duplicate an isolation plan

Duplicate an isolation plan

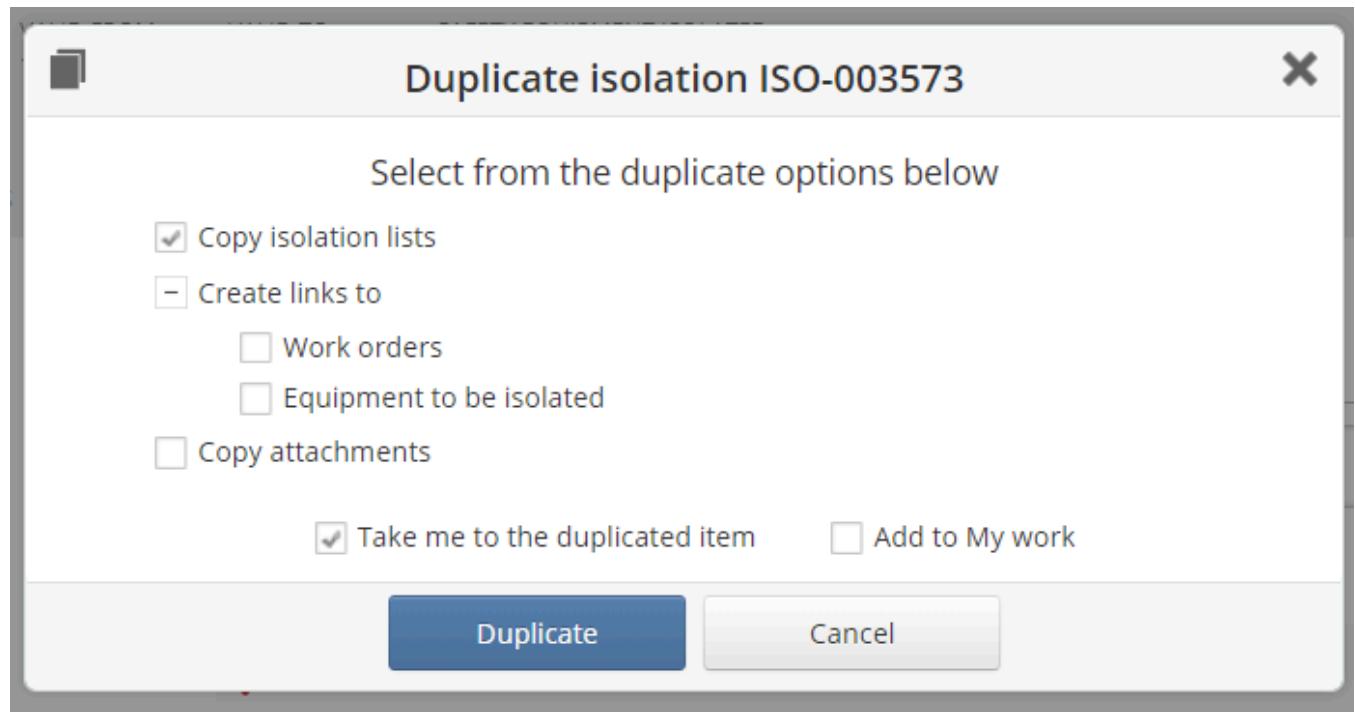
- Click the **Duplicate** button to duplicate an entire isolation plan.



Options

When duplicating an isolation plan, the following options are possible as shown below.

- Copy isolation lists
- Create links to
 - Work orders
 - Equipment to be isolated
- Copy attachments



Print isolation plans

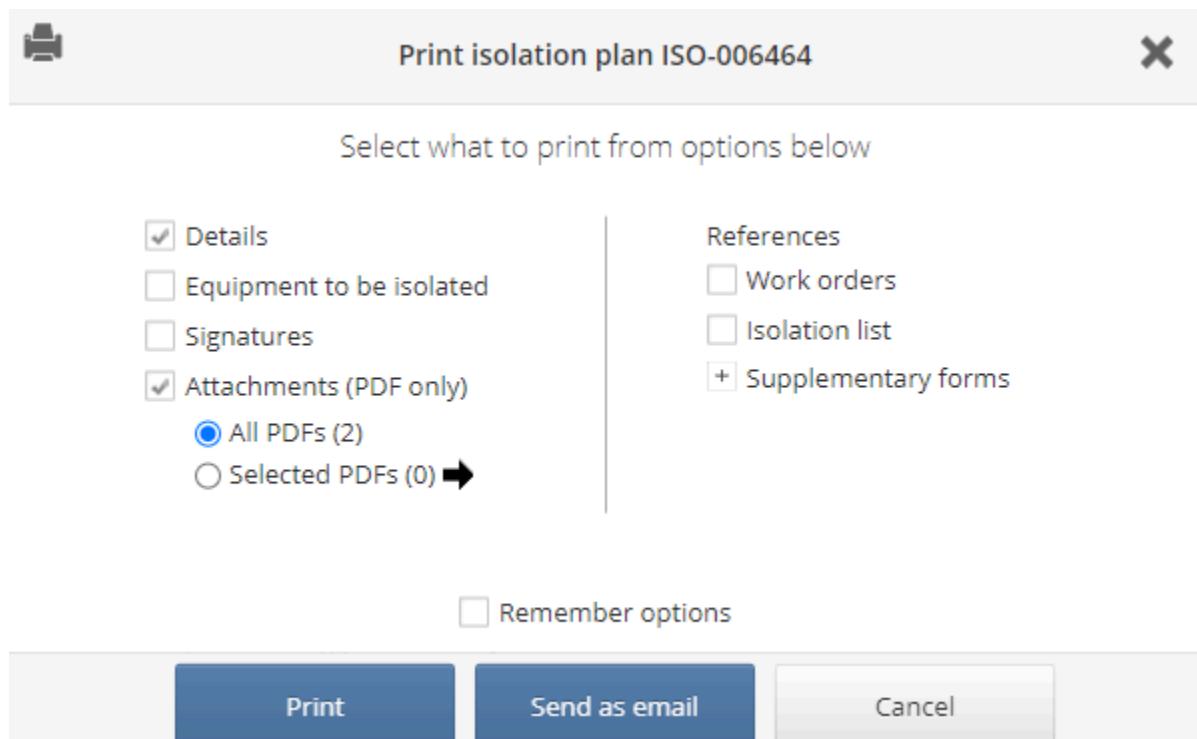
When printing an isolation plan, you are given the option to print details, attachments, and linked references at the same time.

Print an isolation plan and its attachments

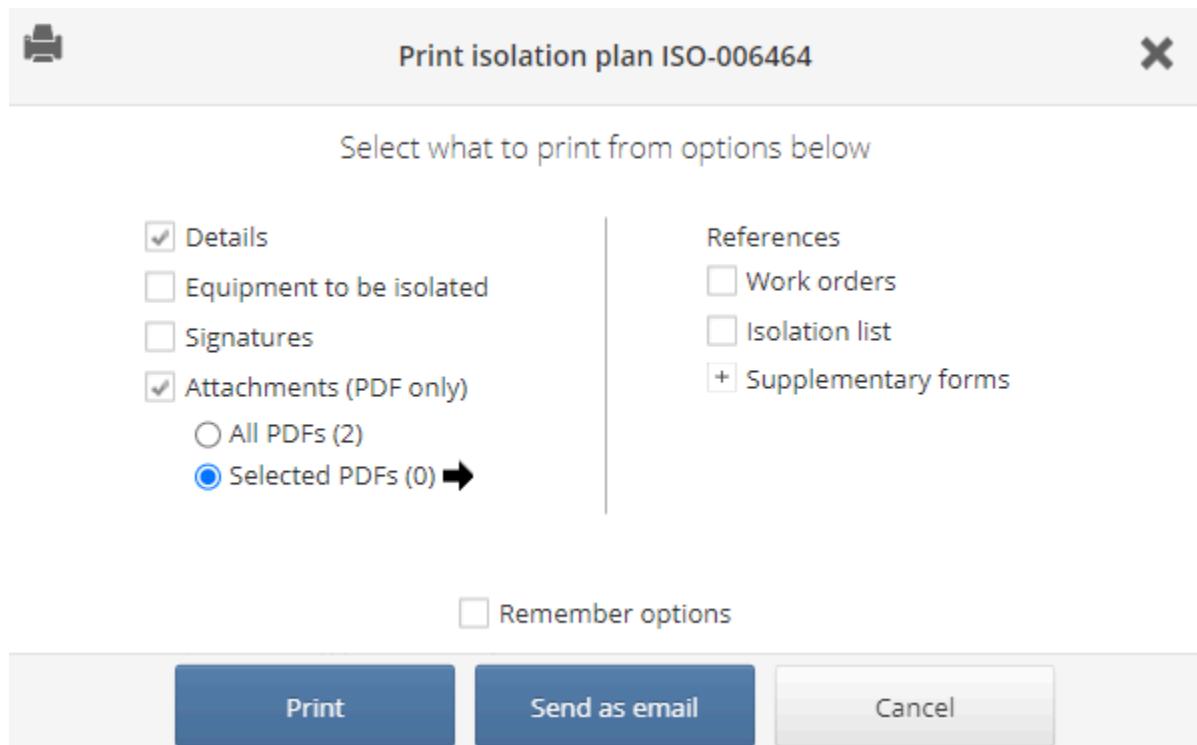
1. Open the isolation plan and click the **Print** button.



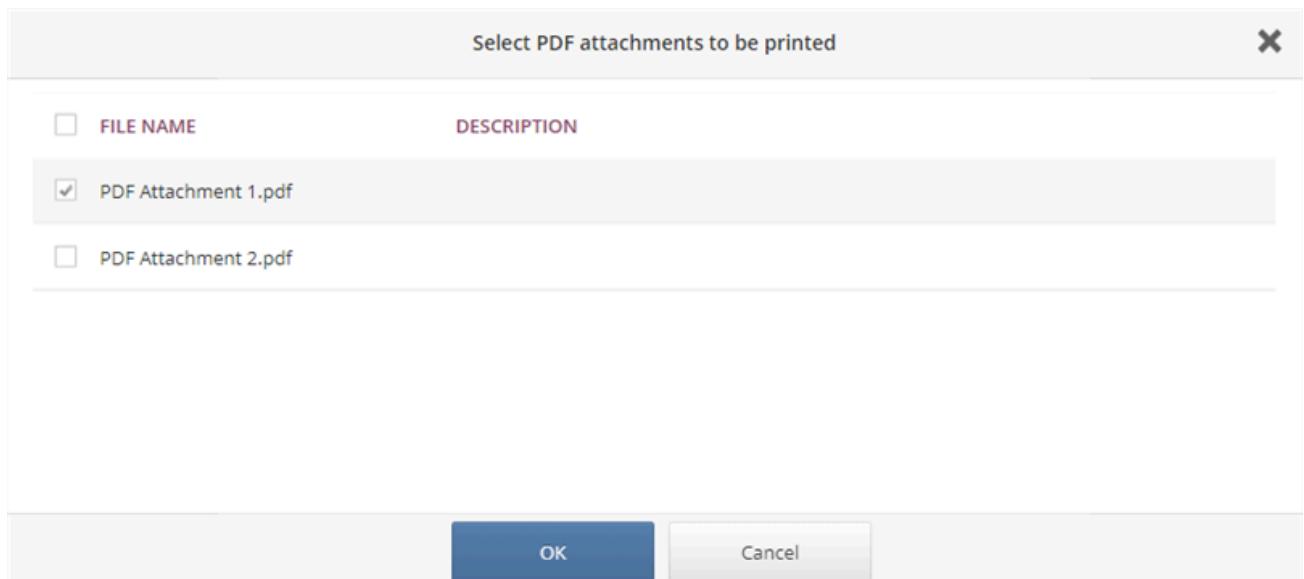
2. Select which details and linked items to print.
3. (Optional) If there is more than one PDF attachment, you can select the **Attachments** checkbox and choose whether to print all PDF attachments or select which PDFs to print.



4. (Optional) Click the **Selected PDFs** option and then click the arrow ➔ icon.



5. Select the attachments you want to print and click **OK**.



6. (Optional) Select the **Remember options** checkbox to remember these print options for next time.
7. Click **Print**.

Edit an isolation plan

Edit an isolation plan

1. In the Details view, click the **Edit** icon in the upper-right corner.



2. On the Edit form, edit the details. For more information, see [Fields on Create New Isolation page](#).
3. Click **Save changes**.

The screenshot shows the 'Update isolation' page. At the top left is a padlock icon. The title 'Update isolation' is displayed. Below the title are two input fields: 'Title *' containing 'Mechanical isolation plan' and 'Number' containing 'ISO-006464'. A large text area labeled 'Description' contains the text 'Mechanical work on turbine W-06 in West field.' Below this are several dropdown and input fields: 'Site (UTC+13) *' set to 'Wind Farm 1', 'Applicant *' set to 'Arne Beyer', 'Area' set to 'Turbine Fields West', 'System' set to 'Safety System', 'Discipline' (search bar), 'Valid from *' (12/10/21, 19:30), 'Valid to *' (12/11/21, 19:30), 'Compensating action *' (safety measures in place), and a radio button group for 'Safety equipment isolated *' with 'Yes' selected. At the bottom are 'Save changes' and 'Cancel' buttons. A note at the bottom right indicates '* Required fields'.

Fields on Edit Isolation page

These are the fields when editing an isolation plan item.

Field	Description
• <i>Title</i>	The title of the isolation plan.
• <i>Number</i>	The number that was auto-generated for isolation plan.
• <i>Description</i>	A description of the isolation plan.
• <i>Site*</i>	In edit view, this field is read-only. It specifies the site where work will take place.

Field	Description
• <i>Applicant</i>	The name of who person created the plan. Select from the drop-down list.
• <i>Area</i>	You can select an Area of the Site.
• <i>System</i>	You can specify the type of system that relates to this plan.
• <i>Valid from</i>	The start date that the plan is valid.
• <i>Valid to</i>	The end date that the plan is valid.
• <i>Discipline</i>	The discipline that is performing this plan.
• <i>Compensating Action</i>	The compensating actions that will be taken. These are actions that will be taken to reduce risks during the work procedure.
• <i>Safety equipment isolated</i>	Specifies Yes if equipment is isolated.

Overview

Overview of isolation plan

Overview tab

The Overview tab shows the description of the Isolation plan, the compensating action, and the equipment to be isolated.

It also has a list of the Isolation lists attached to the plan.

The screenshot shows the 'Mechanical isolation list' page. At the top, there's a header with a lock icon, the title 'ISO-005641 Mechanical isolation list', and navigation buttons for WORKFLOW, DUPLICATE, PRINT, and EDIT. Below the header, there's a row of status information: STATUS (200 - Approved), SITE (UTC+13) (Wind Farm 1), AREA (Turbine Fields East), SYSTEM (Pipe System), DISCIPLINE (Piping), APPLICANT, VALID FROM (24/02/21 19:30), VALID TO (25/02/21 19:30), and SAFETY EQUIPMENT ISOLATED (Yes). Below this is a navigation bar with tabs: OVERVIEW (selected), REFERENCES (0), ATTACHMENTS (0), SIGNATURES, and LOGS.

Description

A brief introduction that describes the purpose of the work.
- Need for support from personnel with special competence.
- Details on which and how barriers should be set according to the "minimum requirements when opening a pressured system".
- Need for a specific order when establishing barriers.
- Identified risk

Equipment to be isolated

NO EQUIPMENTS TO BE ISOLATED

Isolation lists

NUMBER	TITLE	TYPE	EQUIPMENT TO B...	STATUS	#
ISL-054164	Mechanical Isolation list	MECH		In execu...	3

Compensating action

action

References

Manage references for isolation plan

References tab

On the **References** tab, you can search for and add work orders and supplementary forms as references to the isolation plan.

Guidelines

- You can add references when work item is in editable status.
- References to be added cannot be in *Canceled* or *Closed* status.
- If work item is cancelled, all references will be removed.
- You can remove linked references when work item is in editable status.
- For some reference types, you can perform the workflow directly from References page.

Log entry for deleted read-only references

When you delete a link to read-only reference, there is now a log entry for this action. This applies for all reference types for the following work items:

Work Permit, Isolation Plan, Isolation List, Task Risk Assessment, Safe Job Analysis and Supplementary Form.

OSM makes a log entry only if the work item is in non-editable state (such as after approval). When the work item is in an editable state, there is no log entry.

- If both items are editable - no log entry
- If one item is non-editable - creates log entry
- If both items are non-editable - creates log entry

The log entry happens on both sides—on the work item side and on the reference side.

Why. Because if there is an audit, there is a record of previous associations between work items, even if these items have been removed.

Example—An example of log entry for a deleted reference.

DESCRIPTION

Supplementary form
ST10006171 has been
removed as a reference by
user

Sections

The References tab has these sections.

- **Work orders** - Search for and add [Work Orders](#). If configured, dates from work order can be automatically copied to isolation plan when work order is added.
- **Supplementary forms** - Search for and add [Supplementary Forms](#). You can create a Supplementary Form from here.

The screenshot shows the 'REFERENCES' tab selected in the top navigation bar. Below it, two sections are displayed:

- Work orders (1)**: A table with one row:

STATUS	NUMBER	TITLE	PRI.	DI	DU DATE	TC	MAIN OBJECT	Actions
Work in prog...	CWO-111894	INSPECTION O...	C	Ele...			20VA001	
- Supplementary forms (0)**: A table with one row:

Actions	Search (min. 3 chars.) in several fields	Search icon

At the bottom, a message states: NO SUPPLEMENTARY FORMS ARE LINKED TO CURRENT ISOLATION PLAN.

Icons

These icons appear on the References tab.

Icon	Description
	Performs a process change that moves the item from one status to another status in the workflow.
	Deletes the reference

Add a reference to an isolation plan

Reference sections

Depending on the type of work item, you can add different references to the work item.

Section titles show the number of attached references, such as (2) and an icon for lowest status indicator.

Add a reference

1. On the **References** tab, expand the relevant section.
2. Enter at least 3 characters into the Search bar and click the **Search**
3. Select an item from the search results.
4. Click **Save changes**.

Supplementary forms (1)

form					
Number	Title	Valid from	Valid to	Type	
CF0004758	USPP_Form			CUSTFORM	
CF0004751	SUPP_FORm			CUSTFORM	

Delete a reference

- Click **Delete** next to the reference. The Delete option availability depends on the current status of the work item.

Status indicator icons

There are seven key phases, shared by all entities, that are identified and will be given the relevant color symbol.

Icon	Phase	Examples of statuses
	New	<i>New</i>
	In planning	<i>For approval</i>
	Approved	<i>Approved, In execution</i>
	Active	<i>Active, Active extended</i>
	Inactive	<i>On hold, Expired</i>
	Closed/Completed	<i>Completed, Closed</i>
	Canceled	<i>Canceled</i>

Attachments

Manage attachments for isolation plan

This topic relates to [Details for isolation plans](#). The **Attachments** tab contains a list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the **Add**  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



The screenshot shows the 'Add attachment' dialog box. At the top right is a close button (X). Below it is a section labeled 'Attachment type' with a dropdown menu. The menu has two visible options: 'File storage' (selected) and 'Internet address'. To the right of the dropdown is a blue 'Choose file' button. Below the dropdown is a message: 'No attachments has been uploaded yet'. At the bottom are two buttons: 'Upload all' (blue) and 'Cancel'.

4. If you are adding a URL, enter the URL, and click **Add web link**.



The screenshot shows the 'Add attachment' dialog box. The 'Attachment type' dropdown is now set to 'Internet address'. Below it is a text input field labeled 'Enter URL' containing the value 'www.weatherstation.org.nz'. This input field is highlighted with a yellow border. Below the input field is a message: 'Attachments ready to be uploaded'. Underneath that is another message: 'No attachments has been uploaded yet'. At the bottom are two buttons: 'Upload all' (blue) and 'Cancel'.

5. When you have finished adding files or URLs, click **Upload all**.

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.
	<p>If this red icon displays, hover over the tooltip to see the message. Click red icon to remove.</p> <ul style="list-style-type: none">• File size is exceeded• File type is not supported
	Click the Delete icon to delete an existing attachment.

Signatures

View signatures for isolation plan

Signatures tab

The **Signatures** tab contains all the signatures that have been applied to the current item. This is a read-only page.

Note: It is not possible to enter signatures through this page. Signatures are dynamic and are part of Workflow process.

Sometimes, this page may have the option to revoke signatures.

The screenshot shows a user interface for managing signatures. At the top, there are tabs: OVERVIEW, REFERENCES (0), ATTACHMENTS (0), SIGNATURES (selected), and LOGS. Below the tabs, a yellow banner displays the message: "All signatures are signed as part of workflow". The main area has columns for ROLE, PROCESS, SIGNED BY, SIGNED, and SIGN ON BEHALF OF. A row is shown for "Operator responsible" with "1.Approve" in the process column, "Thor Arnold" in the signed-by column, and the date "30/01/20 12:49" in the signed column. To the right of the signed column is a blue "Revoke" button.

Logs

View logs and snapshots for isolation plan

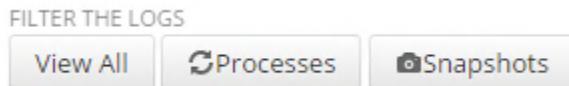
Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes and snapshots .

- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a snapshot that was taken at the time an item was Approved.
- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the **Logs** tab, click **View All**, **Processes**, or **Snapshots** to change the filter.



FORM	REFERENCES (3)	ATTACHMENTS (0)	SIGNATURES	LOGS	
FILTER					
View all		Processes	Snapshots		
DATE	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS	DESCRIPTION
20/05/20 03:09	[REDACTED]	Approve	100 - New	200 - Approved	
20/05/20 03:09	[REDACTED]		-	-	Snapshot of form created after process "Approve" was performed
20/05/20 03:09	[REDACTED]		-	-	Snapshot created after process "Approve" was performed
16/04/20 12:32	[REDACTED]		-	-	Created

Icons

These icons appear on the Logs tab.

Icon	Description
	A process change that moved the item from one status to another in the workflow process.
	Data snapshot - View a snapshot of unformatted data at a specific time.
	Form snapshot - View a snapshot of the form with data at a specific time.

Example of data snapshot

The screenshot shows the AVEVA OSM Web User Guide interface for an Isolation Plan (IP-055712). The top right corner displays the status "Status when printed: 300 - Active".

NAME: ISOLATE SOMETHING

DESCRIPTION: - A brief introduction that describes the purpose of the work.

COMPENSATING ACTION:

SITE (UTC+2)	AREA	SYSTEM	DISCIPLINE	APPLICANT	START AT	END AT	SAFETY EQ.
	P30 - PROCESS...	-	M - Mechanical	Larsson-Fedde...			ISOLATED No

Equipment to be isolated:

	TAG NAME 20CH7600A
	20CH7600B

Work orders:

NUMBER

Isolation lists:

TYPE	NUMBER	TITLE	EQUIPMENT TO BE ISOLATED	STATUS	#
	IL-054398	Isolate some valves	20CH7600A	130 - Active	
	IL-054399	Isolate another valve	20CH7600B	130 - Active	

Isolation Lists

What is an isolation list?

An Isolation List is a predetermined set of sequential steps that must be followed to isolate a system that will be worked on. An Isolation List must be part of an Isolation Plan.

Setting up isolation lists

Use this list as a basic guideline for setting up and using isolation lists.

• Create an isolation list	Create a new isolation list.
• Fields on Create Isolation List page	Enter the required fields.
• Manage references for isolation list	Add the related Work permit and other references.
• Add Isolation Points to isolation list	Create the Isolation points that determine the isolation list.
• Process the isolation list workflow	Process the status of the isolation list
• Sign for isolated on an isolation point	Sign off on each of the Isolation Points in the isolation list. Each isolated point must be signed.
• Add system locks to isolation points	Add a system lock or a personal lock to an isolation point, if needed.
• Sign for Reset on an isolation point	Reset the Isolation points to their starting positions. When work is complete, the points need to be reset to original position.

Process the isolation list workflow

Generally, specific functions will be available in the isolation list and to the Isolation Points in the list, depending on the current status of the [workflow](#).

Therefore, when the status of the isolation list changes, the available functions will change.

Note: Due to dynamic configuration, there are many possibilities for custom configuration of the list functionality. The functionality of your isolation list will be configured to your business needs.

Example of Isolation List workflow

This is a general concept of the way an isolation list will usually work.

Starting Statuses	Available functions
	<p>Example statuses: <i>New, Approval Pending, Approved</i></p> <ul style="list-style-type: none"> • Add Isolation Points • Edit the details of isolation points • Delete isolation points • Add system locks to Isolation Points

	<ul style="list-style-type: none">• Add personal locks to Isolation Points
Operational Statuses	Available functions Example statuses: <i>Active, In Execution, Reset, Test</i> <ul style="list-style-type: none">• Can not usually add Isolation Points while in this phase.• Can not usually delete Isolation Points while in this phase.• In this phase, points are signed as isolated and can be locked.• Add personal locks.• After work is complete, all points need to be reset before closing the list.• Sign for isolated on an isolation point• Add system locks to isolation points• Sign for Reset on an isolation point• Sign for Test on an isolation point
End Statuses	Available functions Example statuses: <i>Closed, Canceled</i> <ul style="list-style-type: none">• Can no longer modify any details of the list.• When cancelled, all reference links are deleted. <hr/> <p>Note: All linked tag references for an isolation list will be deleted when the isolation list is processed to Canceled. This makes it possible in the future to delete a tag without having references in closed items that make it unable to delete the tag.</p>

Create an isolation list

An Isolation plan can have multiple isolation lists. For more information, see [Setting up isolation lists](#).

Create an isolation list

1. On the [Isolation Plan](#) page, under Isolation lists, click the **Add**  button to create new list.

Isolation lists



Create new isolation list

NO ISOLATION LISTS FOUND

The *Create new isolation list* dialog box appears.

2. Enter the required details including **Title** and **Type**. Fields with an asterisk are required.

For more information, see [Fields on Create Isolation List page](#).

Create new isolation list

Key information from the isolation

(UTC+13) Wind Farm 1	AREA Turbine Fields West	SYSTEM Safety System	SAFETY EQUIPMENT ISOLATED Yes
-------------------------	-----------------------------	-------------------------	----------------------------------

Title * Blade inspection and repair **Number** [To be generated]

Type * Mechanical Intrusive work Person responsible Arne Beyer

Description

* Required fields

W-12-TB-10017

Create new isolation list **Cancel**

3. Click **Create new isolation list**.

Isolation lists

NUMBER	TITLE	TYPE	IW	EQUIPMENT TO BE ISOL...	STATUS	#	
ISL-055258	Blade inspection and repair	MECH	<input checked="" type="checkbox"/>	W-12-TB-10017	New	0	
ISL-055257	Maintenance and repair of safety system	MECH	<input checked="" type="checkbox"/>		New	0	

Fields on Create Isolation List page

These are the fields for an isolation list item. Fields with an asterisk are required.

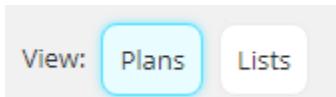
Field	Description
<i>Title*</i>	The title of the isolation list.
<i>Number</i>	The number will be auto-generated.
<i>Type*</i>	Select the isolation list type.
<i>Intrusive work</i>	Intrusive work is classified as any work that disturbs the production in a site.
<i>Person responsible</i>	The name of the person responsible for this list. Select from the drop-down list.
<i>Description</i>	A description of the isolation list.

Delete an isolation list

Note: You can delete Isolation lists only while they have a status of *New*.

Delete an isolation list

1. On the Isolations Library page, click **Plans** to display the Plans view.



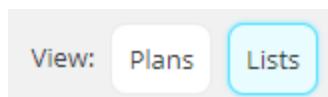
2. In the Plans library list, click an isolation plan to open it.
3. On the **Overview** tab, under **Isolations list**, find the list and click the **Delete** icon.

Isolations lists					
TY NUMBER	TITLE	TYPE	EQUIPMENT TO BE ISO...	STATUS	#
ISL-051933	De-couple water pump from electrical circuit	Electrical	WPMP001	For approval	2
ISL-051931	Isolate pressure from water pump	Mechanical	WPMP001	New	4

Search isolation lists

You can search isolations by querying for different parameters.

Tip: Switch between isolation plans and isolation lists by using the toggle buttons.



Open the Search panel

1. Click the icon on right side of the screen. The Search panel expands.
2. Select the search details and click **Search** to search with the given parameters.
The search panel closes and the library list refreshes to show only isolations that meet the search filter.

Reset the search query

- Click **Reset all filters** to reset the search query values.



Close the Search panel

- Click to close the Search panel.

Pin the Search panel

- Pin the search panel to have it always open.

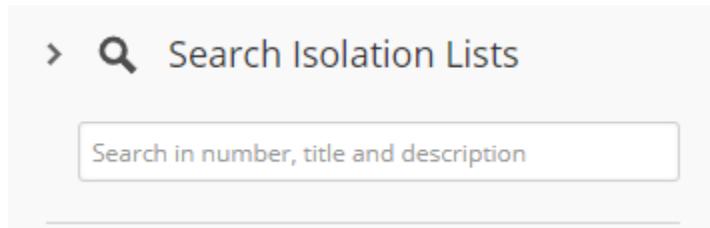
See also [Isolation list search parameters](#)

Isolation list search parameters

This topic describes using search parameters in the search panel for isolation lists.

Search isolation lists

- Enter a minimum of three characters that appear in the number, title, or description.



Site

- Click the **Search** icon to display drop-down menu of available sites.
Click **Reset** to return the filter to empty.

The screenshot shows a user interface element for selecting a site. It consists of a label 'Site' followed by a dropdown menu. Inside the dropdown menu, the option 'Wind Farm 1' is selected. There is also a small downward arrow icon indicating the dropdown can be expanded.

Type of isolation list

- Enter three characters to search for the Type, or choose the Type from the drop-down list.

The screenshot shows a table titled 'ISOLATION LISTS' with two columns: 'Code' and 'Name'. The first row contains 'ELEC' and 'Electrical'. The second row contains 'MECH' and 'Mechanical'. At the top of the page, there is a search bar with the placeholder 'Search in code and name' and a magnifying glass icon. Below the table, there are navigation icons for 'PAGE 1 OF 1'.

Code	Name
ELEC	Electrical
MECH	Mechanical

Status

The status section that displays depends on the type of isolation list.

- Select the relevant statuses to include in the search filter.
- Click **Reset** to return the filter to its default state. Some statuses are configured as default by the administrator.

Type of isolation list [Reset](#)[Electrical](#) **Status**

- 100 - New
- 150 - Approval pending
- 160 - Technical approval pending
- 200 - In execution
- 300 - Active
- 500 - Reset requested
- 530 - Reset in execution
- 560 - Approval of test pending
- 570 - Test in execution
- 800 - Closed
- 900 - Cancelled

Lock number**Lock number****Show only****Show only**

- Intrusive work

Involved tag

Involved tag

Used as "equipment to be isolated" or "isolation point"

Search (min. 3 chars.) in several field  

Person responsible

Person responsible

Search in code and name 

Created by

- Enter three characters to search for name of the person who created the isolation list, or choose name from the drop-down list.

Created by

[Reset](#)

Thor Arnold 

Created

- Select the starting date and end date of Creation date in the date range you are looking for.

Created

08/03/21 - 10/03/21

Isolation Plan

ISOLATION PLAN

Find lists where the isolation plan meets these search criteria

Search in number, title and description

Area

- Limit the search to a specific [Area](#).

System

- Limit the search to a specific [System](#).

Discipline

- Limit the search to a specific [Discipline](#).

Applicant

Applicant

Search in code and name

Created by

Created by

Search in code and name

Valid from and Valid to

- Select the [Valid From](#) and [Valid To](#) dates.

Is safety equipment isolated

- Select **Yes** or **No**.

Is safety equipment isolated [Reset](#)

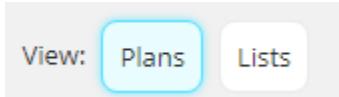
Yes No

Details for isolation lists

When you click on an isolation list in the Isolations library, you can access an overview of the details for that specific isolation list.

Open an isolation list

1. On the Isolations Library page, click the **Lists** button to view only isolation lists.



2. Double-click an isolation list to open the Details pages.

Isolation List tabs

Each isolation list has several tabs containing the details about the isolation list.

OVERVIEW

ISOLATION POINTS (6)

REFERENCES (2)

ATTACHMENTS (2)

SIGNATURES

LOGS

• Overview	Overview of isolation list.
• Isolation Points	Add isolation points to an isolation list.
• References	Add references to an isolation list.
• Attachments	Add attachments to an isolation list.
• Signatures	View signatures for an isolation list.
• Logs	View log for an isolation list.

Process workflow on isolation list

The processes that you can perform will depend on the access you have in the configuration.

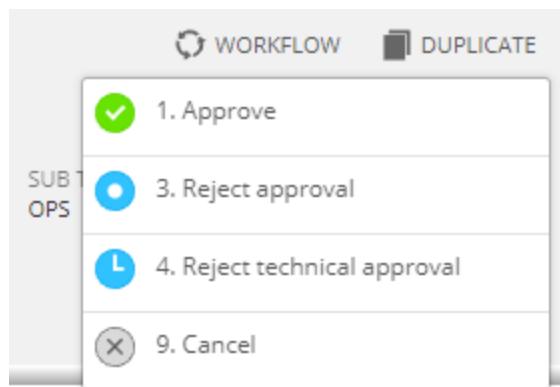
Perform workflow

1. In the Details view, click the **Workflow** icon in the upper-right corner.



A list of processes displays.

2. Select a process to perform.



The **Workflow** dialog box appears.

3. Review the [Summary](#) section that this is the operation you want to perform.
4. If signatures are required, sign in the [Signatures](#) section
5. If a message is required, write a message in the [Send to Co-worker](#) section.
6. Click **Perform process**.

The screenshot displays the 'Summary' and 'Signatures' sections of the OSM Web interface.

Summary:

- CURRENT STATUS: 150 - For approval
- PROCESS: 1. Approve
- NEXT STATUS: 200 - Approved

Signatures:

SIGNATURE REQUIRED	SIGNED BY	SIGN ON BEHALF OF
<input checked="" type="checkbox"/> Area responsible	[Signature]	Select/search in code and name
<input checked="" type="checkbox"/> Operation supervisor	[Signature]	Select/search in code and name
<input checked="" type="checkbox"/> Central Control Room	[Signature]	Select/search in code and name

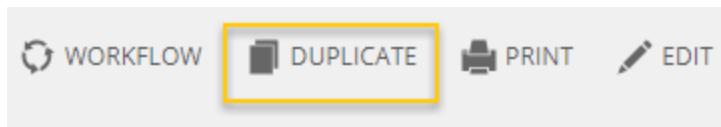
Buttons at the bottom: Apply signatures, Perform process, Cancel.

Duplicate an isolation list

Note: It will not be possible to duplicate an isolation list if the [Isolation plan](#) is in a status where duplication is not enabled.

Duplicate an isolation list

- Click the **Duplicate** button to duplicate an entire Isolation list.

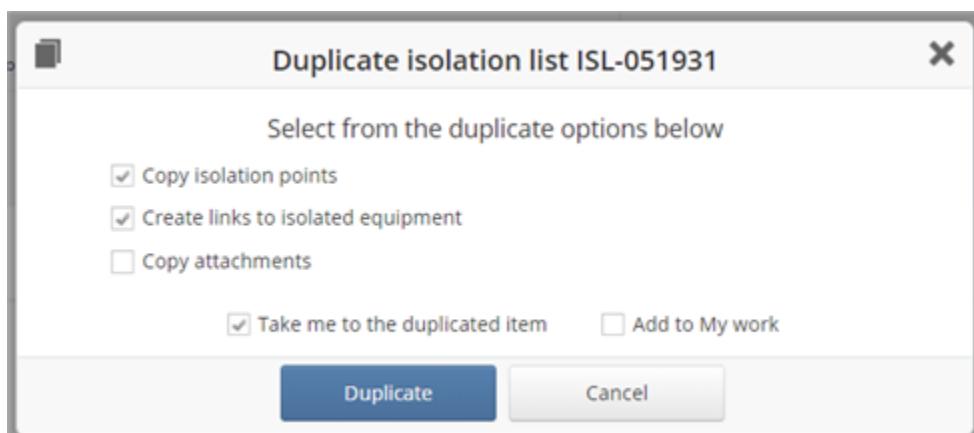


Note: If the change loop for mechanical isolation list is used for changing the position, the original maintenance position will be used for the duplication.

Options

When duplicating an isolation list, the following options are possible.

- Copy isolation points
- Create links to isolated equipment
- Copy attachments



Print isolation lists

When printing an isolation list, you are given the option to print details, attachments, and linked references at the same time.

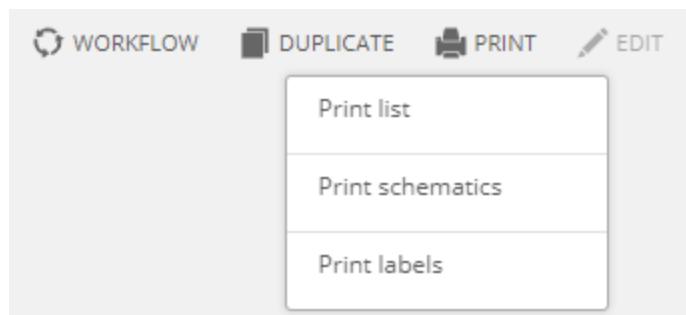
Note: All enabled Dynamic Functionality features will show on the printout, even if configured to be invisible in web application for current status. The fields will show, but the values will be empty.

Print an isolation list and its attachments

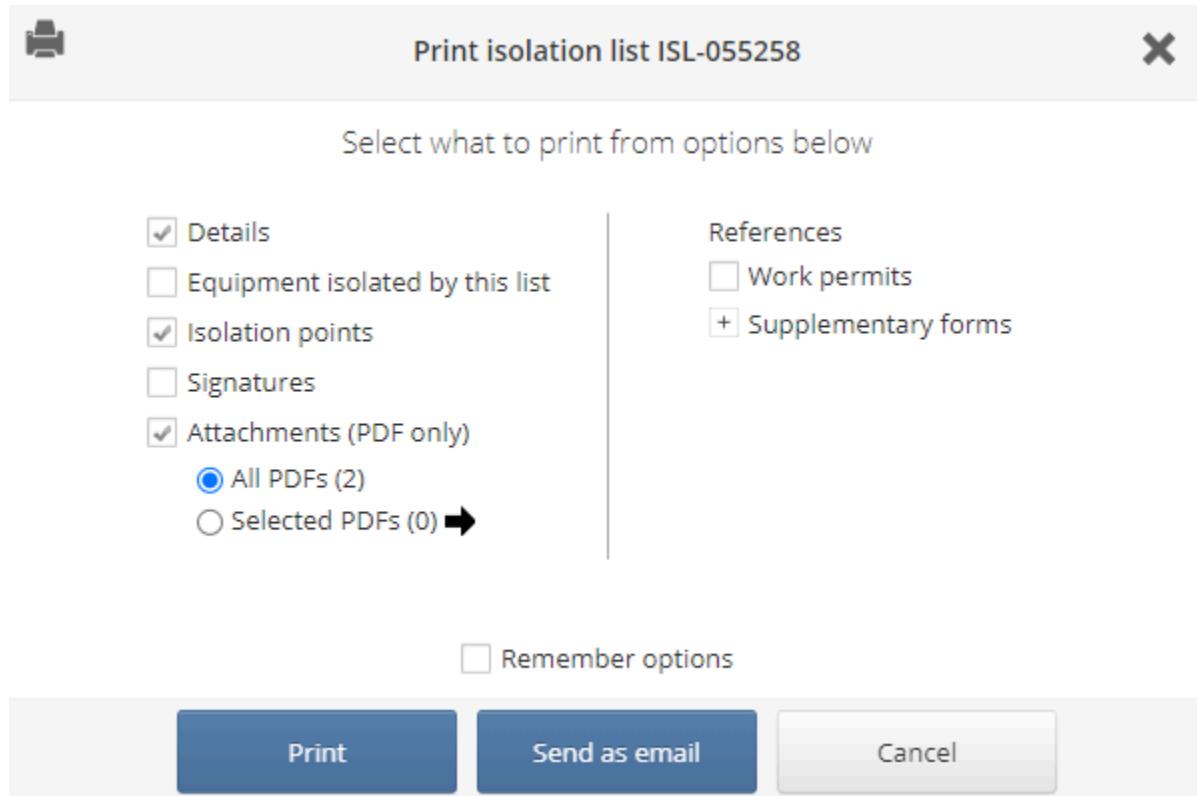
1. Open the isolation list and click the **Print** button.



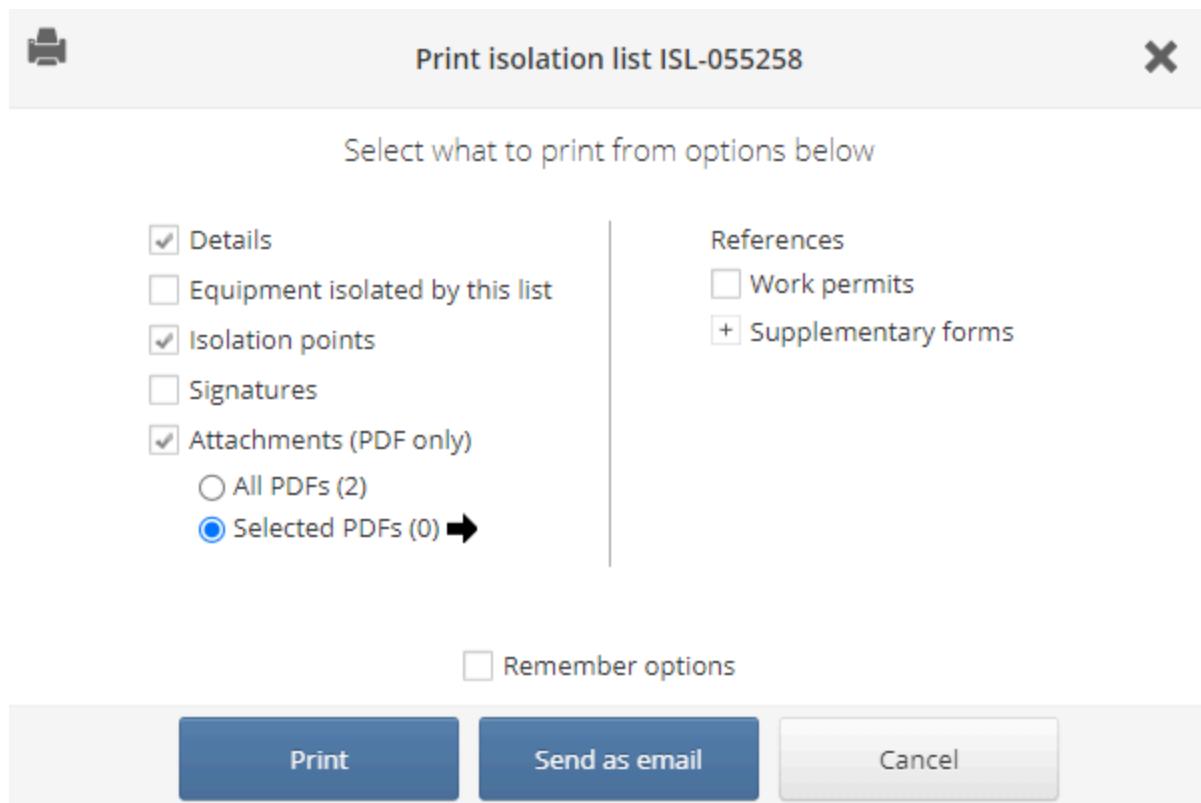
2. On the popup menu, click **Print list**.



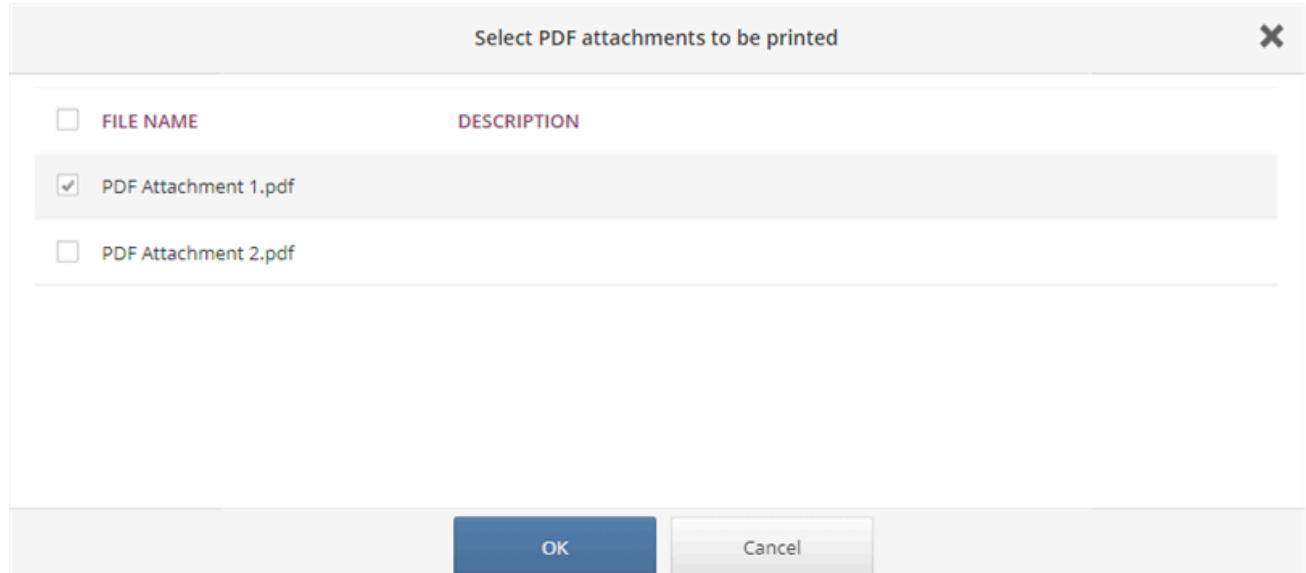
3. Select which details and linked items to print.
4. (Optional) If there is more than one PDF attachment, you can select the **Attachments** checkbox and choose whether to print all PDF attachments or select which PDFs to print.



5. (Optional) Click the **Selected PDFs** option and then click the arrow ➔ icon.



6. Select the attachments you want to print and click **OK**.



7. (Optional) Select the **Remember options** checkbox to remember these print options for next time.
8. Click **Print**.

Print isolation labels for list



Dynamic configuration The availability of this feature depends on the functionality being enabled in the

dynamic configuration interface in OSM Administration.

Printing isolation list labels for list

You can print the labels associated with an isolation list.

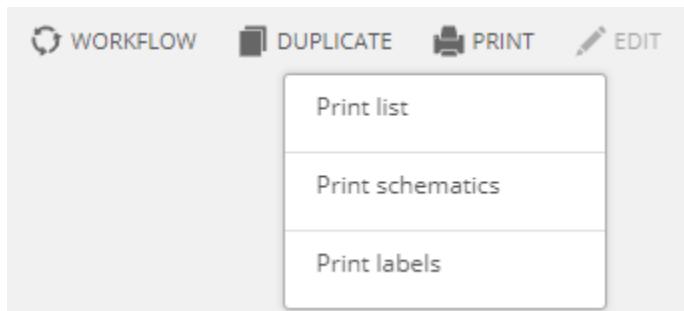
Note: The status of the isolation list must be in one of the operational statuses, such as *Active* or *In Execution*.

Print isolation list labels

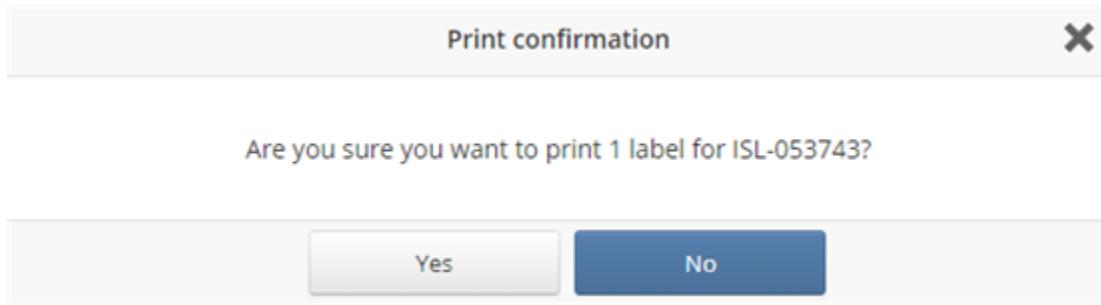
1. Click the **Print** button.



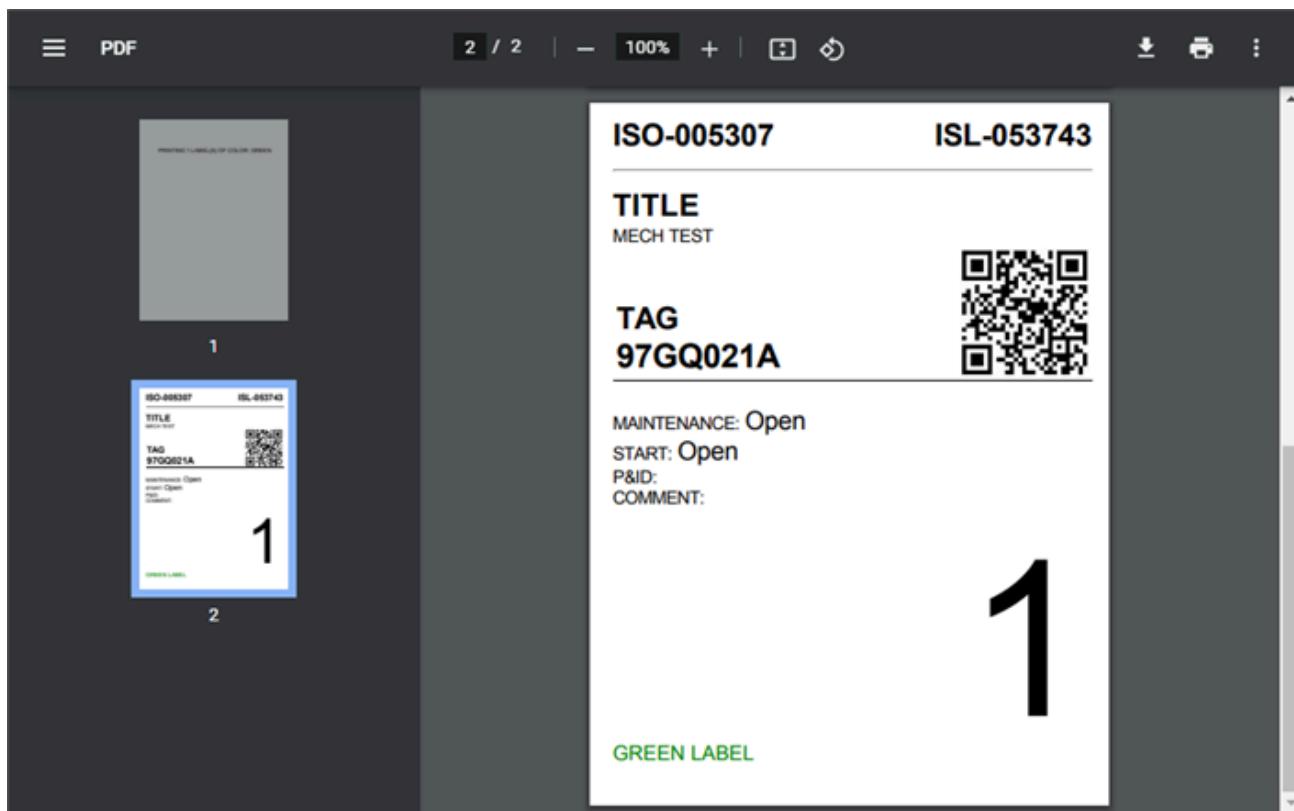
2. On the popup menu, click **Print labels**.



3. On the confirmation dialog box, click **Yes**.



The isolation list label is generated in PDF format.



Print isolation schematics for list



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Printing isolation schematics for a list

You can print the schematics associated with an isolation list.

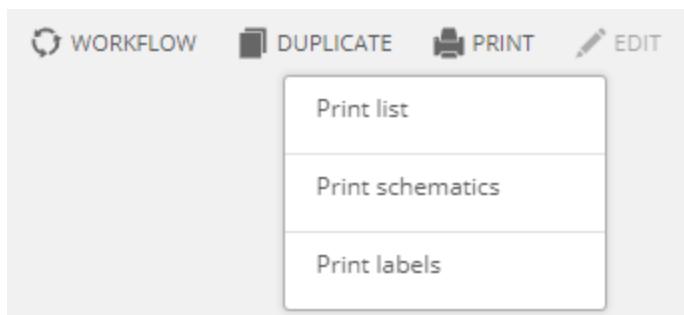
Note: When you use the **Print schematics** feature, only schematics that *contain isolation points* will be printed. You can still print schematics that do not contain points, but you must print them individually. See [Printing schematics with no isolation points](#).

Print schematics in isolation list

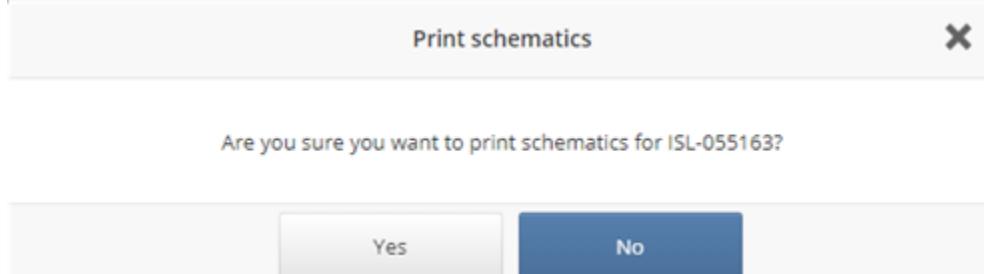
1. Click the **Print** button in toolbar.



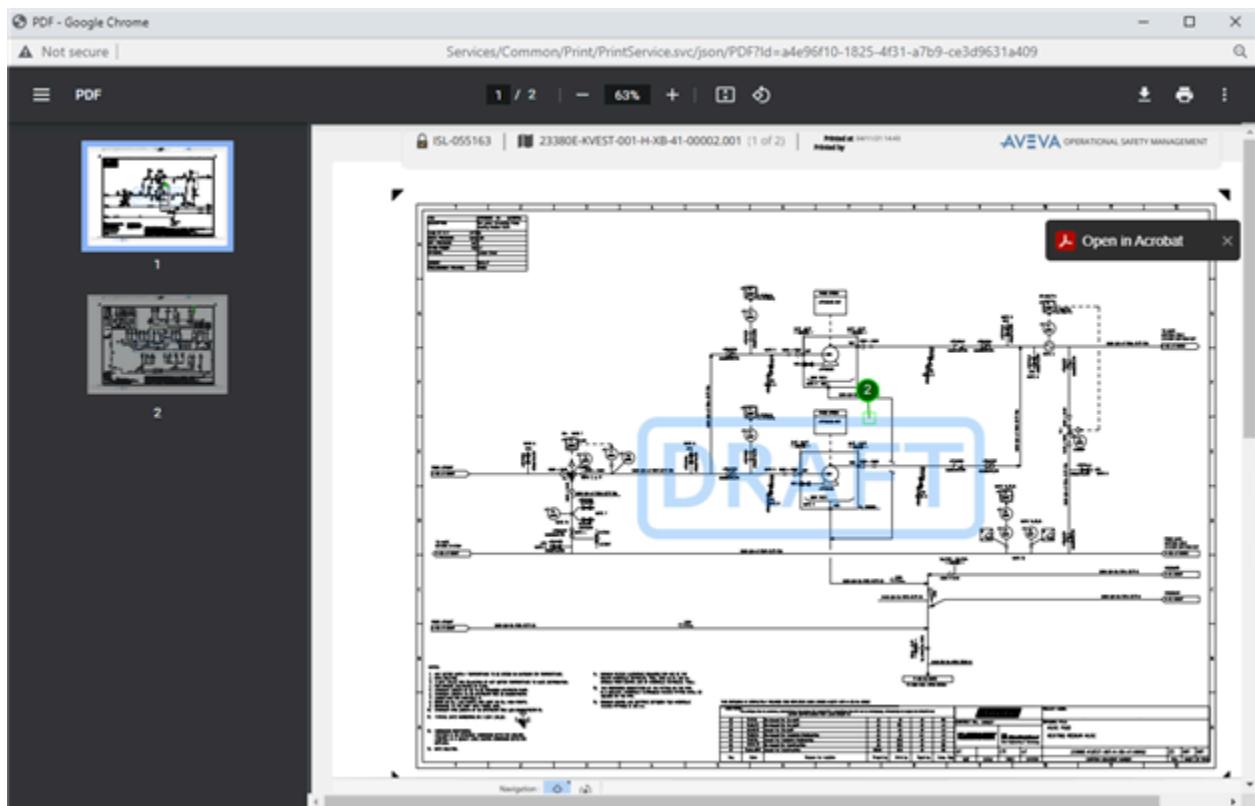
2. On the popup menu, click **Print schematics**.



3. On the confirmation dialog box, click Yes.



Depending on your print configuration, the print service generates a PDF or sends your schematics to the printer.



Printing schematics with no isolation points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Print schematics that have no isolation points

You can print schematics that do not contain points, but you must print them individually.

Print schematic that has no isolation points

1. On the Schematics panel, locate the card for the schematic.
2. Click the **Print** icon for that card.

Edit an isolation list

Edit an isolation list

1. In the Details view, click the **Edit** icon in the upper-right corner.



2. On the Edit form, edit the details. For more information, see [Fields on Update Isolation List page](#).
3. Click **Save changes**.

 Update isolation list

 Key information from the isolation

SITE (UTC+13)	AREA	SYSTEM	SAFETY EQUIPMENT ISOLATED
Wind Farm 1	Turbine Fields West	Safety System	Yes

Title *

Type * Intrusive work

Person responsible

Description

* Required fields

Save changes **Cancel**

Fields on Update Isolation List page

These are the fields when editing an isolation list item.

Field	Description
<i>Title</i>	The title of the isolation list.
<i>Number</i>	The number that was auto-generated for the isolation list.
<i>Type</i>	The isolation list type.
<i>Intrusive work</i>	Intrusive work is classified as any work that disturbs the production in a site.
<i>Person responsible</i>	The name of the person responsible for this list. Select from the drop-down list.
<i>Description</i>	A description of the isolation list.

Overview

Overview of isolation list

Overview tab

The Overview tab shows the description of the Isolation list and the equipment to be isolated.

 ISO-007214 Maintenance on fluid lines

	STATUS 100 - New	SITE (UTC+13) Wind Farm 1	AREA Turbine Fields West	SYSTEM Not selected	DISCIPLINE Not selected	APPLICANT Arne Beyer	VALID FROM 12/08/22 19:30
---	---------------------	------------------------------	-----------------------------	------------------------	----------------------------	-------------------------	------------------------------

[OVERVIEW](#) [REFERENCES \(0\)](#) [ATTACHMENTS \(0\)](#) [SIGNATURES](#) [LOGS](#)

Description

Isolate and lock the supply valve in the inlet line. Depending upon the nature of the process fluid, double block and bleed valves may be employed, in which case both isolation valves (arranged in series) should be closed and locked, and also the bleed valve that drains the intervening run of pipe.

Isolate and lock the discharge valve. Double block and bleed precautions are equally applicable here also.

Isolate and - if possible - bleed any gland sealing fluid supply lines.

Equipment isolated by this list

(The isolation contains all the equipment to be isolated)

<input type="checkbox"/> 21AE5004	
SAMPLE PROBE OIL EXPORT	
 23380E-KVEST-190-P-XB-21-00003.001	
<input type="checkbox"/> 21BL0004	

References

Manage references for isolation list

References tab

On the **References** tab, you can search for and add work permits, supplementary forms, or other isolation lists as references to the isolation list.

Guidelines for links to other Isolation lists

- When you add a link to another isolation list, the source isolation list also shows up on the **References** tab of the destination isolation list.
- Can only link to other isolation lists in the same site.
- Can not link to canceled or closed isolation lists. It won't be possible to search for them. However, lists that were added while in another state will appear in list even if they have moved to a closed or canceled status.

Log entry for deleted read-only references

When you delete a link to read-only reference, there is now a log entry for this action. This applies for all reference types for the following work items:

Work Permit, Isolation Plan, Isolation List, Task Risk Assessment, Safe Job Analysis and Supplementary Form.

OSM makes a log entry only if the work item is in non-editable state (such as after approval). When the work item is in an editable state, there is no log entry.

- If both items are editable - no log entry
- If one item is non-editable - creates log entry
- If both items are non-editable - creates log entry

The log entry happens on both sides—on the work item side and on the reference side.

Why. Because if there is an audit, there is a record of previous associations between work items, even if these items have been removed.

Example—An example of log entry for a deleted reference.

DESCRIPTION

Supplementary form
ST10006171 has been
removed as a reference by
user

Sections

The References tab has these sections.

- **Work permits.** Search for and add [Work Permits](#).
- **Supplementary forms** Search for and add [Supplementary Forms](#).
- **Isolation lists.** Search for and add [Isolation lists](#).

The screenshot shows a navigation bar with tabs: OVERVIEW, ISOLATION POINTS (5), REFERENCES (3), ATTACHMENTS (0), SIGNATURES, and LOGS. The REFERENCES tab is selected. Below the tabs, there are three entries: 'Work permits (1)' with a blue circle containing a white 'L' icon; 'Supplementary forms (1)' with a blue circle containing a white dot icon; and 'Isolation lists (1)' with a green circle containing a white checkmark icon.

Icons

These icons appear on the References tab.

Icon	Description
	Performs a process change that moves the item from one status to another status in the workflow.
	Deletes the reference

Add a reference to an isolation list

Reference sections

Depending on the type of work item, you can add different references to the work item.

Section titles show the number of attached references, such as (2) and an icon for lowest status indicator.

Add a reference

1. On the **References** tab, expand the relevant section.
2. Enter at least 3 characters into the Search bar and click the **Search** icon.
3. Select an item from the search results.
4. Click **Save changes**.

▼ Supplementary forms (1) 

form					
Number	Title	Valid from	Valid to	Type	
CF0004758	USPP_Form			CUSTFORM	
CF0004751	SUPP_FORM			CUSTFORM	

Delete a reference

- Click **Delete**  next to the reference. The Delete option availability depends on the current status of the work item.

Status indicator icons

There are seven key phases, shared by all entities, that are identified and will be given the relevant color symbol.

Icon	Phase	Examples of statuses
	New	New
	In planning	For approval
	Approved	Approved, In execution
	Active	Active, Active extended
	Inactive	On hold, Expired
	Closed/Completed	Completed, Closed
	Canceled	Canceled

Attachments

Manage attachments for isolation list

The **Attachments** tab contains a list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

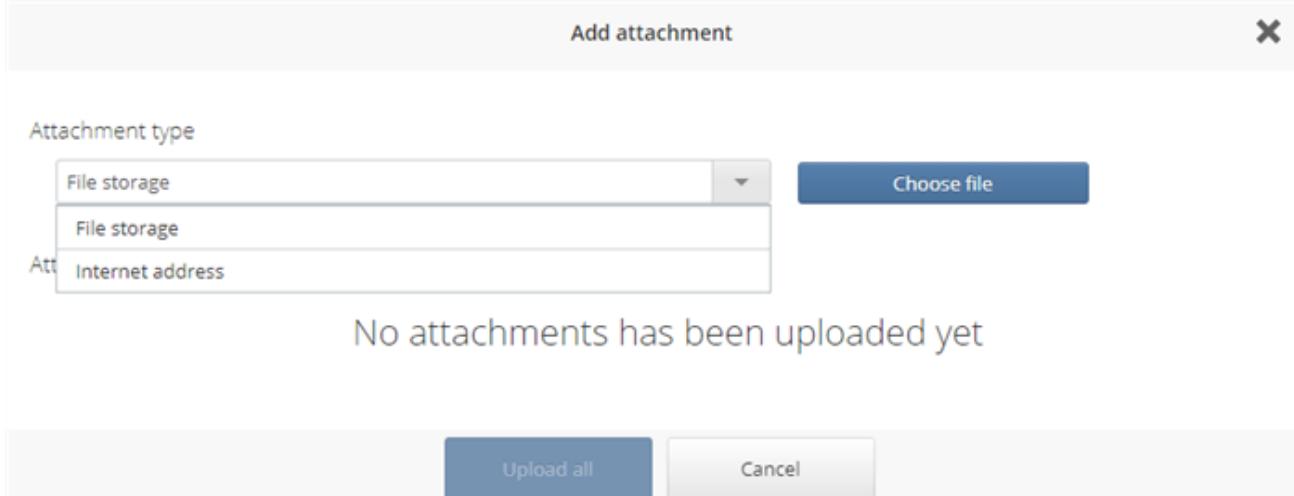
- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the **Add**  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



The screenshot shows the 'Add attachment' dialog box. At the top, there's a title bar with 'Add attachment' and a close button. Below it is a section labeled 'Attachment type' with a dropdown menu. The 'File storage' option is selected. To the right of the dropdown is a blue 'Choose file' button. Below the dropdown, there are two other options: 'File storage' and 'Internet address'. A large message in the center of the dialog box says 'No attachments has been uploaded yet'. At the bottom, there are two buttons: 'Upload all' (blue) and 'Cancel' (grey).

4. If you are adding a URL, enter the URL, and click **Add web link**.

Add attachment X

Attachment type

Internet address ▼ Add web link

Enter URL

Attachments ready to be uploaded
No attachments has been uploaded yet

Upload all Cancel

5. When you have finished adding files or URLs, click **Upload all**.

FORM	PLOT LOCATION	REFERENCES (2)	ATTACHMENTS (3)	SIGNATURES	LOGS																				
			+																						
			<table border="1"><thead><tr><th>FILE NAME</th><th>DESCRIPTION</th><th>ADDED BY</th><th>ADDED</th><th></th></tr></thead><tbody><tr><td>Attachment 1.pdf</td><td>Attachment 1</td><td>View Details</td><td>08/18/22</td><td>Edit Delete</td></tr><tr><td>Attachment 2.pdf</td><td>Attachment 2</td><td>View Details</td><td>08/18/22</td><td>Edit Delete</td></tr><tr><td>www.weatherstation.org.nz</td><td></td><td>View Details</td><td>08/22/22</td><td>Edit Delete</td></tr></tbody></table>	FILE NAME	DESCRIPTION	ADDED BY	ADDED		Attachment 1.pdf	Attachment 1	View Details	08/18/22	Edit Delete	Attachment 2.pdf	Attachment 2	View Details	08/18/22	Edit Delete	www.weatherstation.org.nz		View Details	08/22/22	Edit Delete		
FILE NAME	DESCRIPTION	ADDED BY	ADDED																						
Attachment 1.pdf	Attachment 1	View Details	08/18/22	Edit Delete																					
Attachment 2.pdf	Attachment 2	View Details	08/18/22	Edit Delete																					
www.weatherstation.org.nz		View Details	08/22/22	Edit Delete																					

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.

Icon	Description
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

Signatures

View signatures for isolation list

Signatures tab

The **Signatures** tab contains all the signatures that have been applied to the current item. This is a read-only page.

Note: It is not possible to enter signatures through this page. Signatures are dynamic and are part of Workflow process.

Sometimes, this page may have the option to revoke signatures.

The screenshot shows a user interface for managing signatures. At the top, there are tabs: OVERVIEW, REFERENCES (0), ATTACHMENTS (0), SIGNATURES (selected), and LOGS. Below the tabs, a yellow banner displays the message: "All signatures are signed as part of workflow". The main content area has five columns: ROLE, PROCESS, SIGNED BY, SIGNED, and SIGN ON BEHALF OF. Under ROLE, it says "Operator responsible". Under PROCESS, it says "1.Approve". Under SIGNED BY, it lists "Thor Arnold". Under SIGNED, it shows the date and time "30/01/20 12:49". To the right of the SIGNED column is a blue button labeled "Revoke".

ROLE	PROCESS	SIGNED BY	SIGNED	SIGN ON BEHALF OF
Operator responsible	1.Approve	Thor Arnold	30/01/20 12:49	<button>Revoke</button>

Logs

View logs and snapshots for isolation list

Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes



- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a snapshot that was taken at the time an item was Approved.

- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the **Logs** tab, click **View All**, **Processes**, or **Snapshots** to change the filter.

FILTER THE LOGS

View All	Processes	Snapshots
--------------------------	---------------------------	---------------------------

FORM REFERENCES (3) ATTACHMENTS (0) SIGNATURES LOGS

FILTER

View all	Processes	Snapshots
--------------------------	---------------------------	---------------------------

DATE	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS	DESCRIPTION
⌚ 20/05/20 03:09	[REDACTED]	Approve	100 - New	200 - Approved	
⌚ 20/05/20 03:09	[REDACTED]		-	-	Snapshot of form created after process "Approve" was performed
⌚ 20/05/20 03:09	[REDACTED]		-	-	Snapshot created after process "Approve" was performed
16/04/20 12:32	[REDACTED]		-	-	Created

◀ PAGE 1 OF 1 ▶

Icons

These icons appear on the Logs tab.

Icon	Description
⌚	A process change that moved the item from one status to another in the workflow process.
📷	Data snapshot - View a snapshot of unformatted data at a specific time.
⌚	Form snapshot - View a snapshot of the form with data at a specific time.

Example of snapshot

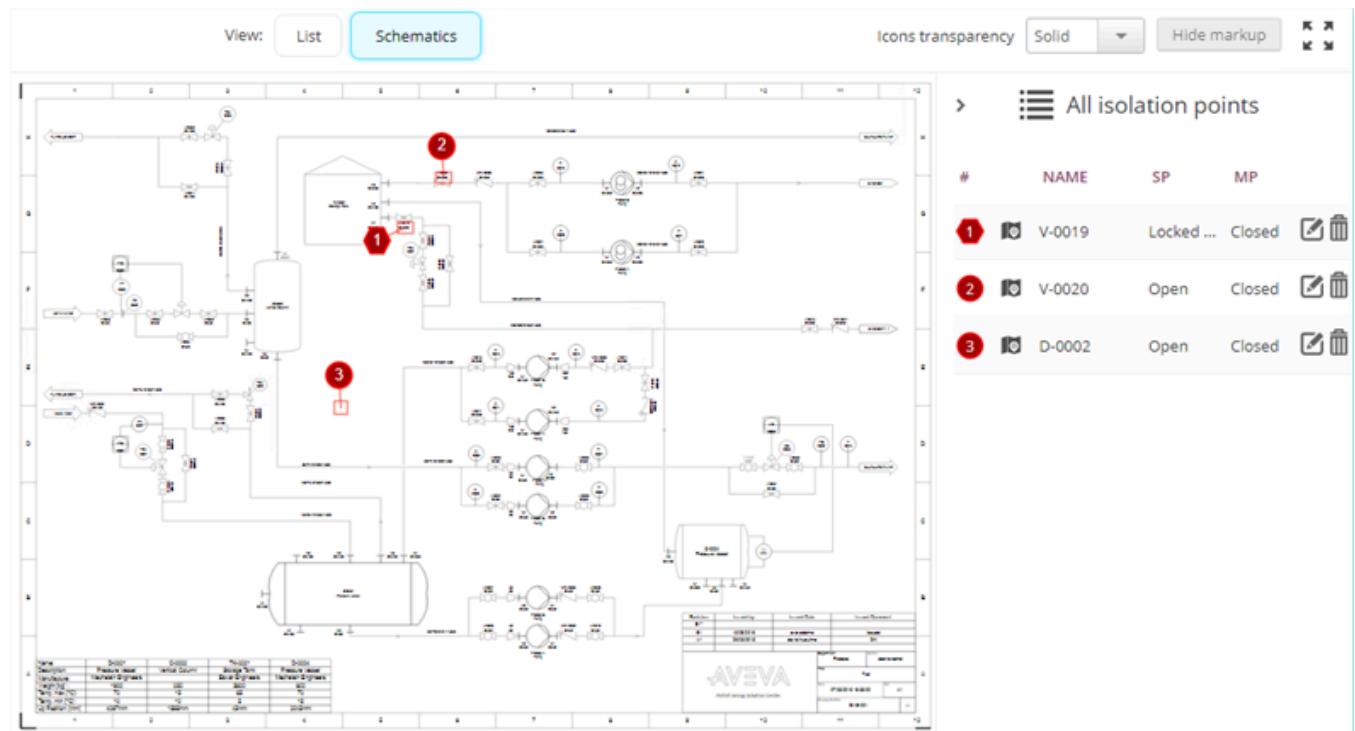
The screenshot shows a Microsoft Edge browser window titled "Operational Safety Management - Work - Microsoft Edge". The main content is a form for an Isolation List (ISL-055946). The form includes fields for NAME (ISL-055946), DESCRIPTION, and TYPE (INTRUSIVE WORK, Full Mechanical Setup). Below this, a section titled "Equipment to be isolated" lists an item with TAG NAME 21AE5120A. The final section, "Isolation points", is a table with columns: NO., TAG / SCHEMATIC, START MAINT., NEW MAINT., STATE, LOCK NUMBER, ADDED, ISOLATED, and VERIF. The table contains six rows, each with a numbered circle (1-6) and a corresponding tag name.

NO.	TAG / SCHEMATIC	START MAINT.	NEW MAINT.	STATE	LOCK NUMBER	ADDED	ISOLATED	VERIF
1	21AE5122	Open	Open					
2	MANUALPT	Open	Blinded					
3	21AE5005	Open	Closed					
4	POINT	Open	Open					
5	21TI5131	Open	Closed					
6	NAME	Open	Closed					

Schematics for isolation lists

Schematics is a general term that can refer to different types of engineering drawings.

- Loop
- Electrical
- Process & Instrumentation (P&ID)



Adding isolation points from schematics view



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Adding isolation points from schematic

If configured for your system, you can add isolation points from the Schematic and they will appear in the isolation list.

There are different ways to add a point to an Isolation list from the Schematics view.

- Add isolation points through tags
- Create new isolation points manually

All isolation points, whether added in the List view or the Schematics view will appear in the same isolation list and have an automatic sequence number.

>  All isolation points

#	NAME	SP	MP	CO.
1	21AE5122	Open	Open	  
2	MANUALPT	Open	Blinded	  
3	21AE5005	Open	Closed	  
4	POINT	Open	Open	  

Add isolation points from tags

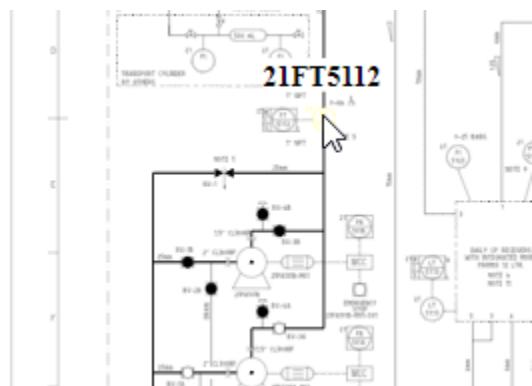
You can add isolation points list by clicking on existing tags on the schematic.

Add isolation points from existing tags on schematic

1. Open an [Isolation list](#).
2. On the Isolations Points tab, click **Schematics** view.



3. Hover the mouse cursor over the schematic until you locate the tag. The tag number will display.
4. Click the mouse button.



The Add isolation point dialog box appears to fill in information related to that point.

Add isolation point

#	Tag *	Schematics
5	21TI5131 CABINET OIL SAMPLING	23380E-KVEST-190-P-XB-21-00003.001

Type and positions

TYPE *
 Valve Blind Other

START POSITION * MAINTENANCE POSITION *

<input checked="" type="radio"/> Open	<input type="radio"/> Open
<input type="radio"/> Locked open	<input checked="" type="radio"/> Closed
<input type="radio"/> Closed	<input type="radio"/> Blinded
<input type="radio"/> Locked closed	

Add Cancel

5. Specify the **Type and positions**.

6. Click **Add**.

7. Click **Save changes**.

The new isolation point is added to the list.

#	NAME	SP	MP	CO.	
1	21AE5122	Open	Open		
2	MANUALPT	Open	Blinded		
3	21AE5005	Open	Closed		
4	POINT	Open	Open		
5	21TI5131	Open	Closed		

Create isolation points manually

You can create a new isolation point manually or from an existing tag in the system. In this case, the tag does not already appear on the schematic, but you can add it from the database.

Create isolation points manually

1. On the **Isolations Points** tab, click **Schematics** view.



2. Press **Ctrl+Click** anywhere on the schematic to create an isolation point exactly on that coordinate. The **Add isolation point** dialog box appears.
 - Type name of new manual point.
or
 - Click the **Switch** icon to change the field to search mode. Enter some characters to search for an existing tag in the database.

Add isolation point

# Tag *	Schematics
3 TYPE IN A FULL NAME...	23380E-KVEST-001-H-XB-41-00002.001

Type and positions

TYPE *

Valve Blind Other

START POSITION *

Open Open
 Locked open Closed
 Closed Blinded
 Locked closed

MAINTENANCE POSITION *

Open Closed
 Blinded

Add Cancel

3. Specify the **Type and positions**.
4. Click **Add**.
5. Click **Save changes**.

For more information, see [Add Isolation Points to isolation list](#).

Show names of points on schematic



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Add isolation points from schematic

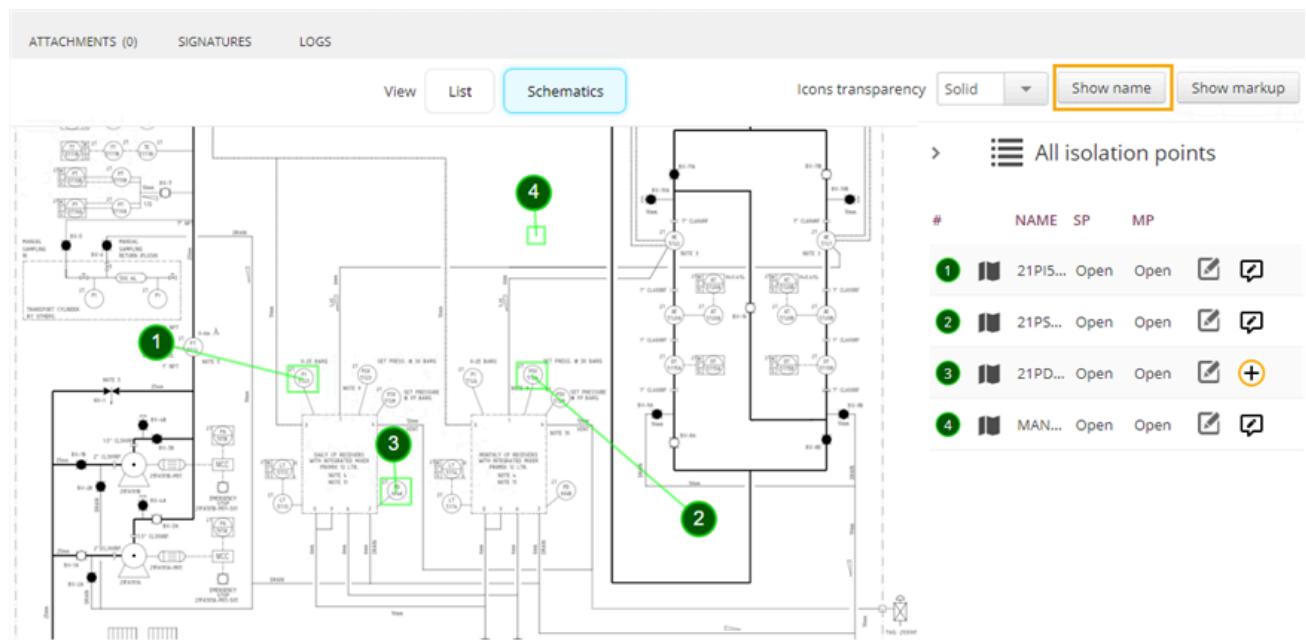
If configured for your system, there is a **Schematics** button to view and interact with the Schematic. Use the **Show name** toggle button to show or hide the full names of the isolation points on the schematic.

Show names of points on schematic

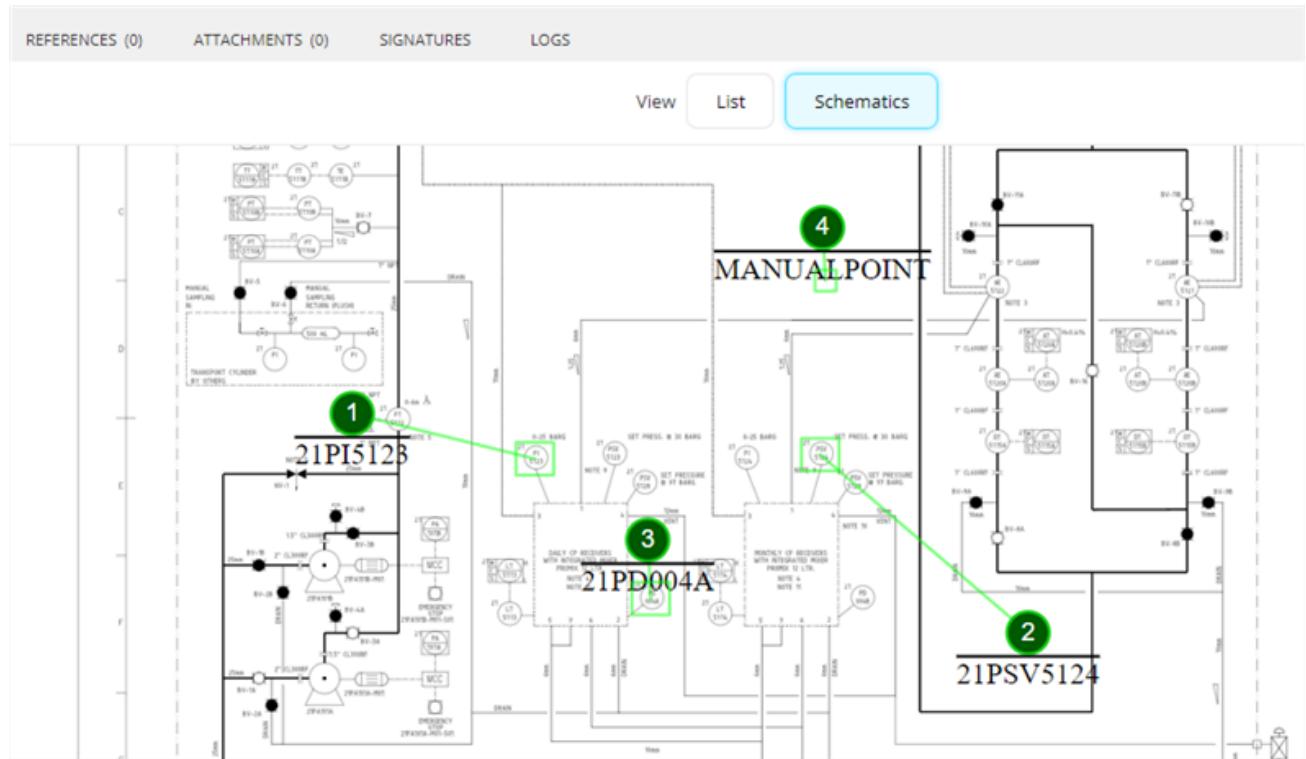
1. Open an [Isolation list](#).
2. On the Isolation Points tab, click **Schematics** view.



3. Click **Show name**.



All Isolation points on the schematic, whether auto-generated or added manually, will show their name in large lettering.



4. Click **Hide name** to remove names from view.

Add additional schematics

Schematics from the **Equipment to be isolated** will automatically appear as cards in the Schematics panel.

You can search for and add additional schematics.

Note: Schematics will only be saved if you plot a point on them. If the schematic does not contain a plotted point, it will not appear next time you open the application.

Add an additional schematic

1. Enter at least three (3) characters into the Search panel and click **Enter**.
2. Select from the list. The new schematic appears in its own card.

Schematic Name	Isolation Points	Z Tags	Other Tags
23380E-KVEST-001-P-XB-21-00006.001	1	1	34
23380E-KVEST-190-P-XB-21-00003.001	1	1	47

Change isolation point icon transparency on schematic

Select transparency level in Schematics view

In the Schematics view, you can set the transparency level for all the isolation points added in the schematic. This lets you to see the information behind an icon. The same transparency is also reflected on the printout.

Set transparency for Isolation Point labels

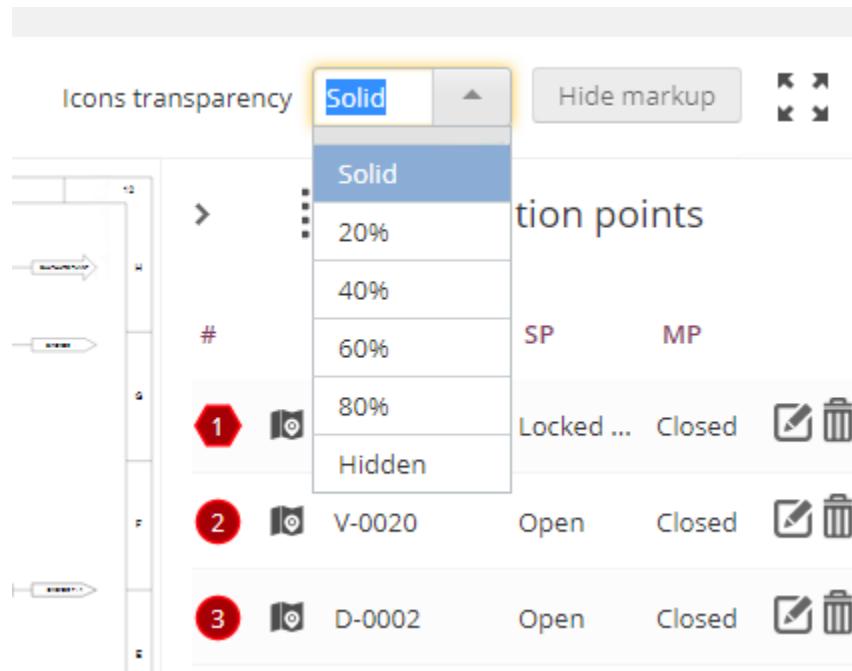
1. On the Isolation Points tab, click **Schematics**.



2. Click the drop-down arrow next to **Icon transparency**.

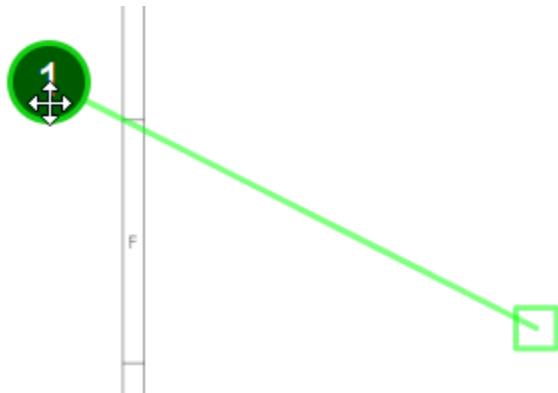


3. Choose a transparency level. For example, change from *Solid* to *80%* transparency.



Drag callouts on schematics

You can drag callouts around if you need to move them to see what's underneath.
Select the callout and drag it to another location.



The position of the point on the schematic does not change, only the position of the callout number.

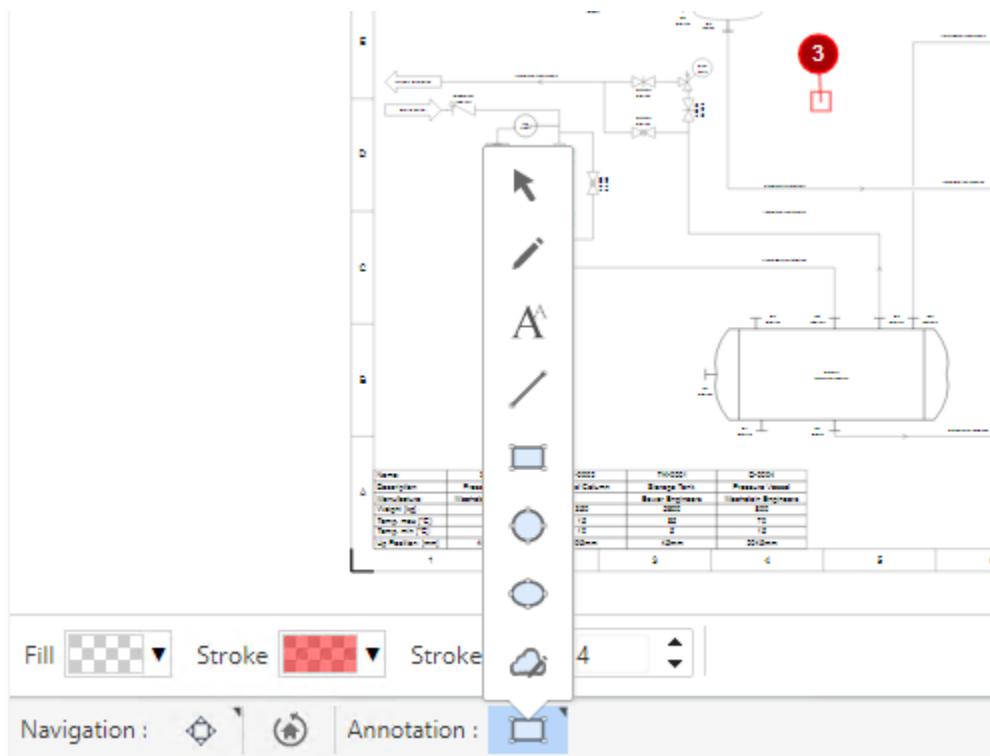
Use drawing tools on schematic

Drawing tools

There is a set of drawing tools that make it possible to mark up and make annotations on a schematic.

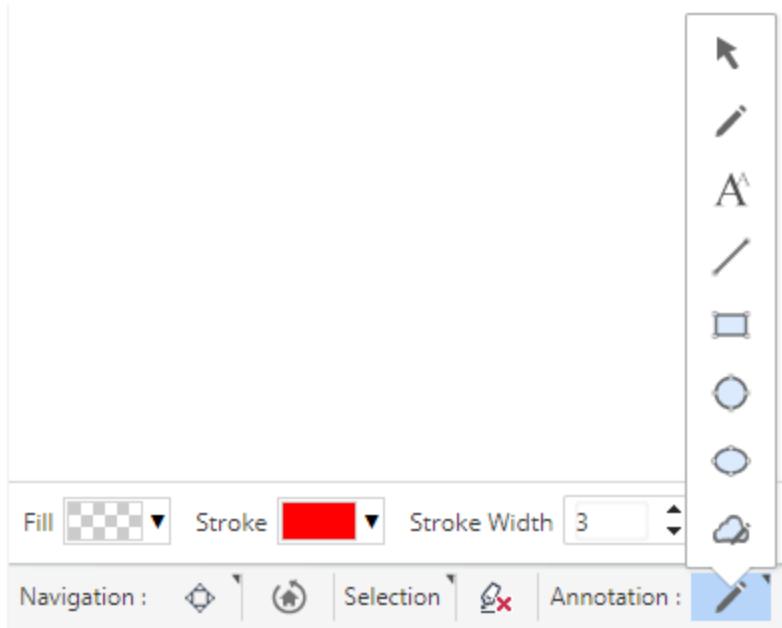
The available tools enable you to:

- Add lines, text, circles, squares with color and transparency.
 - Add text.

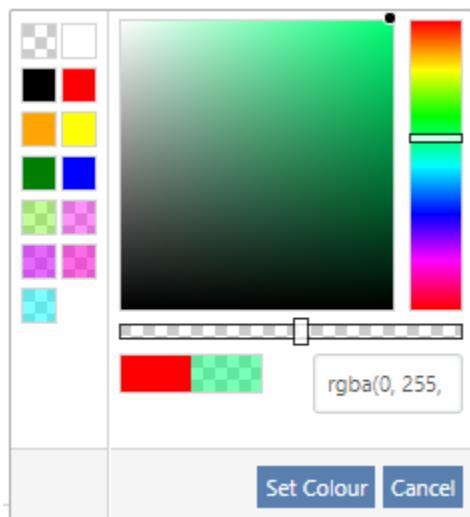


Access the Drawing tools

The tools are available from the toolbar below the schematic.



Coloring and filling



Text and editing



Isolation points

What is an isolation point?

An *isolation point* is a physical point in the schematic where action occurs, such as disconnection points. For example, a cable has two disconnection points: The end that connects to power and the end that connects to the equipment.

Setting up isolation points

Use this list as a basic guideline for setting up and using isolation points.

<ul style="list-style-type: none">• Add Isolation Points to isolation list	Add isolation points to the list. There are several ways to add isolation points. You can add Isolation points by searching for tags.
<ul style="list-style-type: none">• Adding isolation points from schematics view	Add isolation points from tags in the schematic.
<ul style="list-style-type: none">• Create isolation points manually	Optionally, you can plot new isolation points on the schematic drawing.
<ul style="list-style-type: none">• Change maintenance position on points	Change the Maintenance position, if needed.
<ul style="list-style-type: none">• Add system locks to isolation points• Add personal locks to isolation points	Add a system lock or personal lock to an isolation point, if needed. This indicates that the physical point is locked.
<ul style="list-style-type: none">• Process the isolation list workflow	Process the status of the isolation list.
<ul style="list-style-type: none">• Sign for isolated on an isolation point	Sign off on each of the isolation points in the isolation list. Each isolated point must be signed.
<ul style="list-style-type: none">• Sign for Reset on an isolation point	Reset the isolation points to their starting positions. When work is complete, the points need to be reset to original position.
<ul style="list-style-type: none">• Sign for Test on an isolation point	If required, test the resetting of isolation points to their starting positions.
<ul style="list-style-type: none">• Process the isolation list workflow	When all points have been reset and tested, close the list. Close the isolation list by processing it to Closed status.

Add Isolation Points to isolation list

There are different ways to add a point to an Isolation list.

On the List view

- Add isolation points through tag
- Create new points manually

On the Schematics view

- [Adding isolation points from schematics view](#)

Search for tags to add as points

You can add isolation points by searching for tags in the OSM database. The tags in AVEVA™ Operational Safety Management are imported from an external EAM system. Only tags for the current site will be available for search.



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Add an isolation point to isolation list

1. On the Isolations Points tab, click **List** view.



2. Click the **Add** icon. The **Add isolation point** dialog box opens.

- Under **Tag**, enter at least 3 characters into the search box and press Enter to search for an existing tag.

or

You can add isolation points manually. Manual isolation points are not related to tag hierarchy.

- Click the **Switch** icon to type the name of a point manually. The free text name must have no spaces. You can edit free text names.

Add isolation point

#	Tag *	Schematics
2	80EG001A MAIN AC GENERATOR	

Type and positions

TYPE *
 Valve Blind Other

START POSITION * MAINTENANCE POSITION *

Open Open
 Locked open Closed
 Closed Blinded
 Locked closed

Add Cancel

3. Edit the details of the Isolation point.
 - Specify the **Type** as *Valve*, *Blind*, or *Other*.
 - Under **Start Position**, choose initial position of the point. For example, *Open* or *Closed*.
 - Under **Maintenance Position**, choose the position that is required during the maintenance procedure. For example, *Closed*.

4. Click **Add**.

The first point appears in the list.

OVERVIEW	ISOLATION POINTS (1)	REFERENCES (0)	ATTACHMENTS (0)	SIGNATURES	LOGS
	View List Schematics				
#	NAME	POSITIONS			
1	80EG001A	SP Open MP Open			

Build the list

Keep adding isolation points until the list is complete. Drag and drop to change the order of the list items.

You can edit or delete added points based on the current status of isolation list. For more information about icons, see [Isolation point shapes and color codes](#).

#	NAME	POSITIONS	COMMENTS
1	80EG001A	SP Open MP Open	
2	83FO5212	SP Open MP Open	
3	80GK101A-Q07	SP Open MP Closed	

Icons

These icons appear on the Isolation Points List view.

Icon	Description
	Click the Add icon to add a new item to the list.
	Drag an item to change the list order.
	Point is plotted on schematic.
	Click to Edit the isolation point.
	Click the Delete icon to delete an isolation point.

Icon	Description
	Expand to Full Screen mode.

Circuit/tags for electrical template lists

Depending on the type of template the isolation list is based on, different options may appear. Lists that are based on an electrical template will have the ability to add circuit/tags.

Add Circuit/Tag

1. On the Add Isolation Point dialog box, under **Circuit/Tag**, enter at least 3 characters into the search box and press **Enter** to search for an existing tag. Select from the drop-down list. You change the selected tag by removing the tag, and adding a different tag, if needed.

or

You can add a Circuit/Tag manually. Click the **Switch** icon to type the name of a Circuit/Tag manually. The free text name must have no spaces. You can edit free text names.

Name	Description	Status
80IC001B	TURBINE CONTROL PANEL	Active

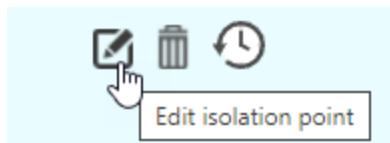
2. Click **Add**.

Modifying and deleting tags

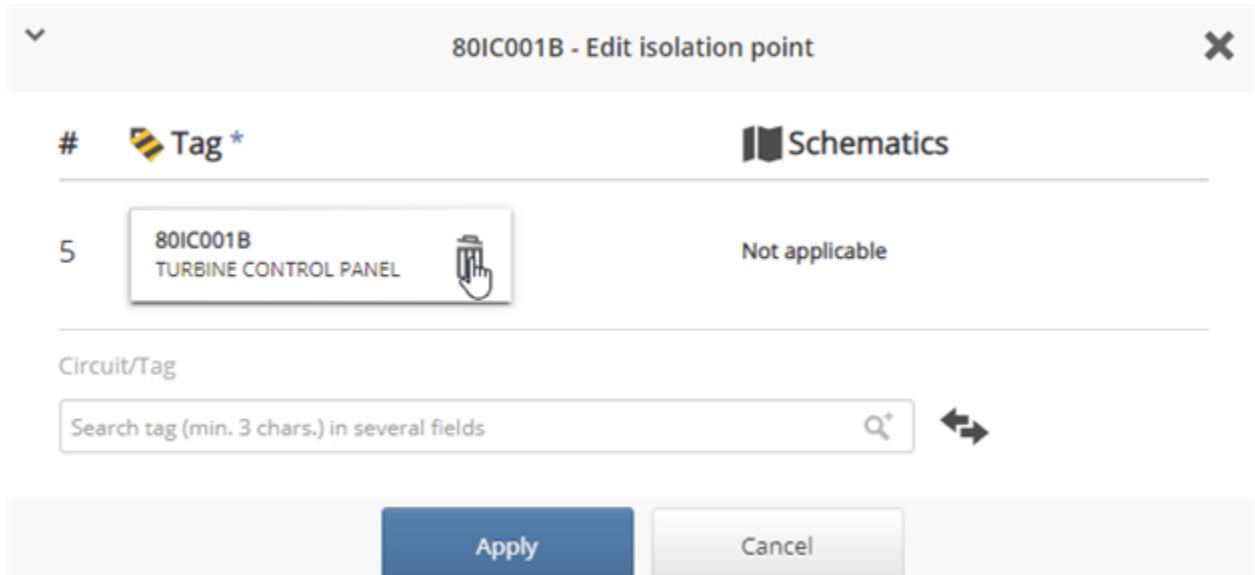
After you have created an isolation point, you can edit the details of a point and change or delete a tag. To delete an entire isolation point, see [Delete isolation points](#).

Edit or delete tags in isolation points

1. On the Isolations Points tab, click the **Edit** icon for the isolation point at the end of the row.



2. On the **Edit isolation point** dialog box, next to the **Tag**, click the **Delete** icon.



3. Search for, or enter a new tag name, then click **Apply**.

Reorder isolation points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Isolation points

Note: You can reorder Isolation points whenever it is possible to add or change points.

Reorder isolation points

1. Open an Isolation list.
2. Drag and drop the isolation points to rearrange the sequence.

The screenshot shows a web-based application interface for managing isolation points. At the top, there is a navigation bar with tabs: OVERVIEW, ISOLATION POINTS (5), REFERENCES (3), ATTACHMENTS (0), SIGNATURES, and LOGS. The ISOLATION POINTS tab is selected. Below the navigation bar, there is a toolbar with a plus sign icon for adding new entries, and buttons for View, List (which is highlighted with a blue border), and Schematics. The main content area is a table titled 'ISOLATION POINTS' with the following columns: #, NAME, and POSITIONS. The table contains five rows, each representing an isolation point with a green circular index number. The first row is highlighted with a light blue background. Each row includes a small icon, the isolation point name, and a column for 'POSITIONS' showing 'SP' and 'MP' status with 'Open' or 'Open' values. To the right of each row are three icons: a pencil for edit, a trash can for delete, and a refresh/clock symbol.

#	NAME	POSITIONS	
1	80EG001A	SP MP Open Open	
2	62L0036	SP MP Open Open	
3	86RWS5000	SP MP Open Open	
4	83FO5212	SP MP Open Open	
5	71FO5407	SP MP Open Open	

Sort isolation points

It is possible to sort on many of the columns in the list of isolation points.

Sort on a column header

1. Click the column header.



A small arrow appears next to the column header.



2. Click the column header again to toggle between ascending and descending order.



Sortable columns

Column	Comments
#	Sequence number of the isolation point in the list. Sorts numerically in ascending or descending order.
Name	Sorts alphabetically in ascending or descending order.
State	Sorts alphabetically in ascending or descending order.
Circuit/tag	Sorts alphabetically in ascending or descending order. Points with no circuit or tag will be at the bottom of the list.
Lock number	Sorts on system lock number. Points with no system lock number will be at the bottom of the list.
Isolated	Points that are not signed will be at the top of the list. Points that are signed are sorted on date/time ascending.
Verified isolated	Points that are not signed will be at the top of the list. Points that are signed are sorted on date/time ascending.
Reset	Points that are not signed will be at the top of the list. Points that are signed are sorted on date/time ascending.
Verified reset	Points that are not signed will be at the top of the list. Points that are signed are sorted on date/time ascending.
Test	Points that are not signed will be at the top of the list. Points that are signed are sorted on date/time ascending.

Delete isolation points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Delete an isolation point

You can edit Isolation points only when this feature is enabled on a status.

Delete an Isolation point

1. In the Isolation list, find the point and click the **Delete** bin icon at the end of the row.

#	NAME	POSITIONS		
1	80EG001A	SP MP	Open Open	
2	62L0036	SP MP	Open Open	
3	86RWS5000	SP MP	Open Open	
4	83FO5212	SP MP	Open Open	
5	71FO5407	SP MP	Open Open	

2. Save the list.

Edit the details of isolation points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Edit an Isolation point

You can edit Isolation points only when this feature is enabled on a status.

Edit the details of an Isolation point

1. In the Isolation list, find the point and click the **Edit** icon at the end of the row.

#	NAME	POSITIONS		
1	80EG001A	SP MP	Open Open	
2	62L0036	SP MP	Open Open	
3	86RWS5000	SP MP	Open Open	
4	83FO5212	SP MP	Open Open	
5	71FO5407	SP MP	Open Open	

The Edit isolation point dialog box opens.

80EG001A - Edit isolation point

#	Tag *	Schematics
1	80EG001A MAIN AC GENERATOR	Not applicable

Type and positions

TYPE * Valve Blind Other

START POSITION * Open Maintenance Position * Open
 Locked open Closed
 Closed Blinded
 Locked closed

Apply Cancel

2. Edit the details of the Isolation point.
 - Specify the **Type** as *Valve*, *Blind*, or *Other*.
 - Under **Start Position**, choose initial position of the point. For example, *Open* or *Closed*.

- Under **Maintenance Position**, choose the position that is required during the maintenance procedure.
For example, *Closed*.
3. Click **Apply**.

Edit comments on isolation points



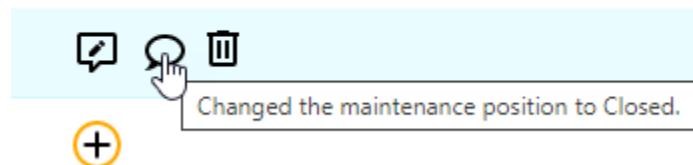
Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Editing comments for an isolation point

If configured, you can add a comment to an existing point, or edit comments for an existing point.

Comments will remain editable for configured statuses.

COMMENTS



You can add, edit, view, and delete comments in **List** view.

#	NAME	POSITIONS	STATE	COMMENTS
1	21AE5004	SP MP	Open Closed	
2	21AE5120B	SP MP	Open Open	
3	21AE5120A	SP MP	Open Closed	
4	21AE5120B-X01	SP MP	Open Closed	

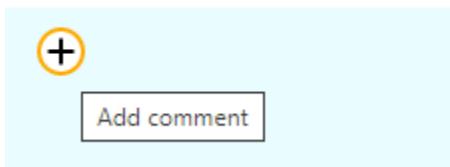
You can also add and edit comments on isolation points in the [Schematics](#) view.

>  All isolation points

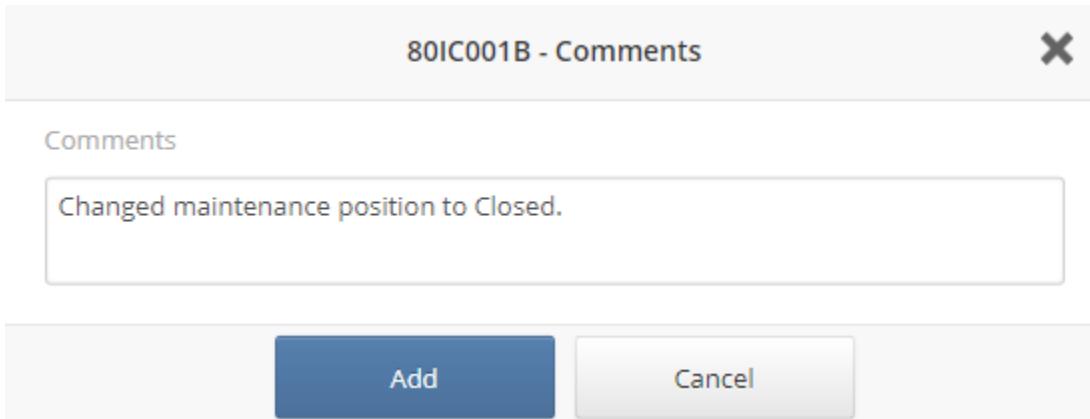
#	NAME	SP	MP		
1	21PI5...	Open	Open		
2	21PS...	Open	Open		
3	21PD...	Open	Open		
4	MAN...	Open	Open		

Edit comments on isolation points in List view

1. On the **Isolation Points** tab, in the **List** view, locate the isolation point in the list of points.
2. At the end of the row, click the **Add**  icon under the **Comments** column.

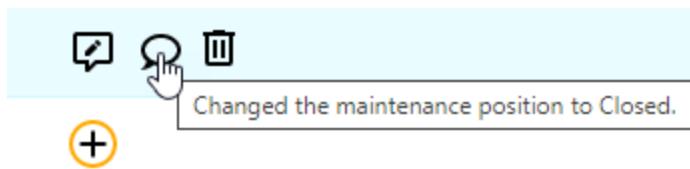
COMMENTS

3. Enter your comments into the pop-up window.



4. Click **Add**.
5. Click **Save changes** on the main window.

The Comments icons at the end of the row change. Hover over the bubble icon to see a tooltip of the Comment text.

COMMENTS

Add or change state for isolation point

 **Dynamic configuration** The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Add or change state for an Isolation point

You can add a state to an isolation point if this feature is enabled. The selectable states are preconfigured by the system administrator.

These are custom states that your site might use for adding certain labels to isolation points to bring attention to their particular status.

STATE

TESTED
 
 

Add or change state

1. On the Isolation Points tab, locate the isolation point in the list of points.
2. Click the **Add**  icon under the **State** column.
3. On the pop-up window, select the state to apply to the isolation point.

83FO5212 - Add state X

Name	
TESTED-Test executed	
<input type="checkbox"/> Follow up	
Code	Name
TESTED	Test executed
TORESET	Needs to be reset
TURNOFF	Turn off this isolation point
TURNON	Turn on this isolation point

Add Cancel

4. (Optional) Select the **Follow up** checkbox and add comments if you want.

83FO5212 - Add state X

Name	
TORESET-Needs to be reset	
<input checked="" type="checkbox"/> Follow up	
Comments	
Needs to be reset	

Add Cancel

5. Click **Add**.
6. Click **Save changes** on the main window.

STATE

TESTED			
TORESET			
Follow up			

The state you selected now appears in the column and *Follow up* appears in red if you selected it.

STATE

TESTED			
TORESET			
Follow up			

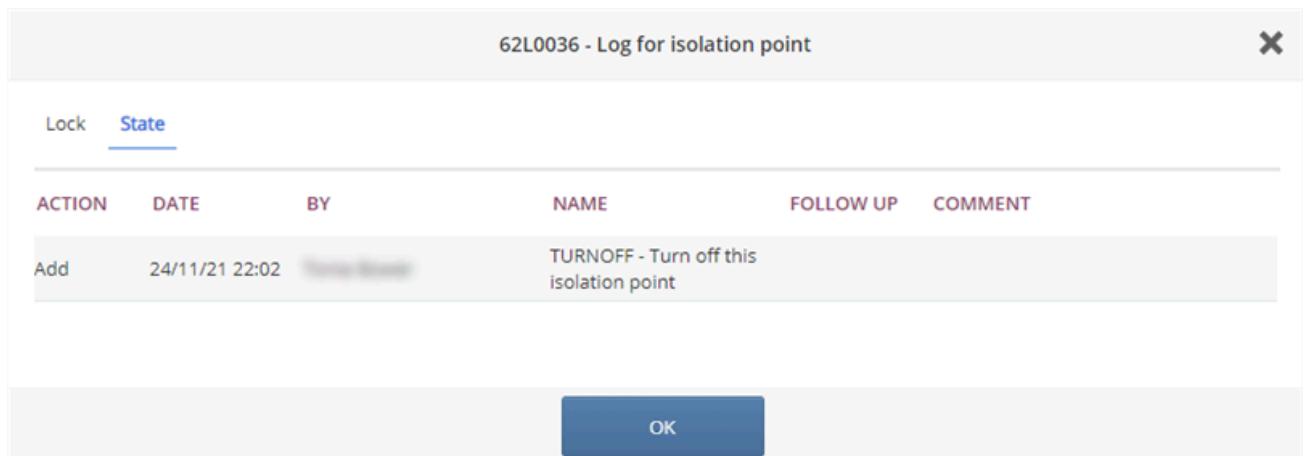
Viewing the log for lock and state changes

View the log for lock and state changes

1. Click the Log icon to see a log history of changes to locks and state.

OVERVIEW							ISOLATION POINTS (5)	REFERENCES (3)	ATTACHMENTS (0)	SIGNATURES	LOGS	
							View				List	Schematics
											Sign multiple	Sign multiple
#	NAME	POSITIONS		STATE		ISOLATED						
1	80EG001A	SP Open MP Open		TURNON	 	 24/11/21 22:02				Sign		
2	62L0036	SP Open MP Open		TURNOFF	 	 24/11/21 22:02			Sign			
3	86RW55000	SP Open MP Open		TESTED	 	 24/11/21 22:02			Sign			
4	83FO5212	SP Open MP Open		TORESET	 	 24/11/21 22:02			Sign			
5	71FO5407	SP Open MP Open		TURNOFF	 	 24/11/21 22:02			Sign			

2. Select either the **Lock** tab or the **State** tab.



- Click **OK**.

Isolation point shapes and color codes

Color coding

Isolation point icons have color coding and shapes to indicate information about the type and status of the point.

		OVERVIEW	ISOLATION POINTS (4)	REFERENCES (0)	ATTACHMENTS (0)	SIGNATURES	LOGS
				View	List	Schematics	
#	NAME	POSITIONS		STATE	ISOLATED	VERIFIED ISOLATED	
1	80EG001A	SP MP	Open Closed	+	<button>Sign</button>	<button>Sign multiple</button>	<button>Sign multiple</button>
2	71CX002	SP MP	Locked Open Open	+	<button>Sign</button>	<button>Sign multiple</button>	<button>Sign</button>
3	83EG001-D01-...	SP MP	Open Open	+	<button>Sign</button>	<button>Sign multiple</button>	<button>Sign</button>
4	83ST5210	SP MP	Open Closed	+	<button>Sign</button>	<button>Sign multiple</button>	<button>Sign</button>

Shapes

The shape of the symbol indicates the type of isolation point: Valve, Blind, or Other.

Symbol	Shape	Type
1	Circle	Valve
2	Square	Blind
3	Hexagon	Other

Colors

The color of the symbol indicates the type of isolation point and whether the maintenance position is Open or Closed.

Color	Type of point	Color of symbol	Maintenance position is
1	Mechanical	Green	Open
2	Mechanical	Red	Closed or blinded
2	Electrical	Purple	

Change maintenance position on points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Changing maintenance position on a point

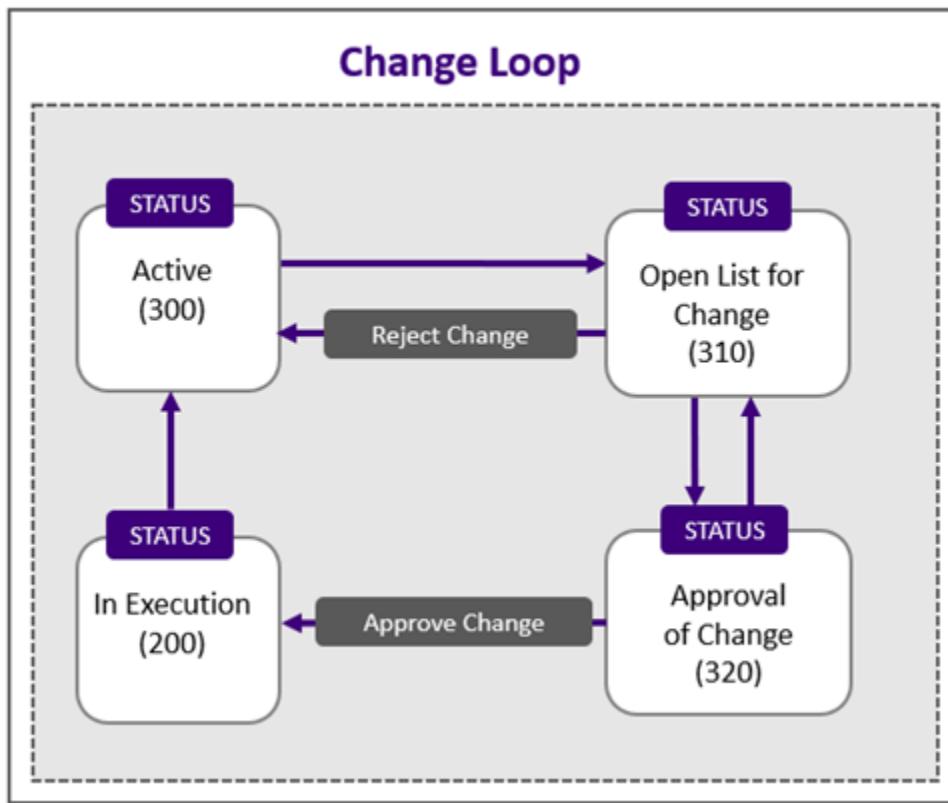
Changing the Maintenance position on an Isolation point is usually done when Isolation list is *Active* and a worker discovers that the Maintenance position needs to be changed.

Change loop

Making a change to one of the isolation points will usually cause those points to need resigning and the list to need reapproval.

- The Change icon will only be visible when the Isolation list is in a status that is configured to show Change icon.

- After a position change, the list will need approval for the change and reactivation.
- Any signatures on the isolation point will disappear and need resigning.



Start position and maintenance position

The **Positions** column indicates the current status of the starting and maintenance positions.

- SP - Start Position
- MP - Maintenance Position
- NMP - New Maintenance Position

If you change the maintenance position, the new maintenance position is NMP - New Maintenance Position.

#	NAME	POSITIONS
1	80EG001A	SP Open MP Open NMP Closed  
2	83FO5212	SP Open MP Open 
3	80GK101A-Q07	SP Open MP Closed 

Guidelines

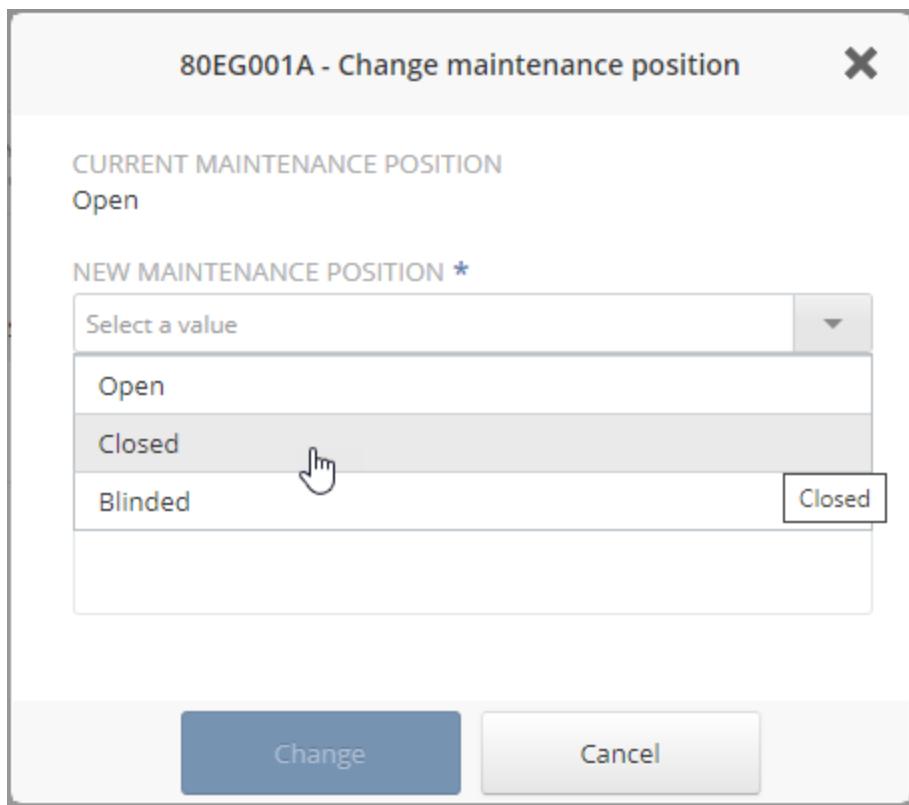
- There is no limit on the numbers of time the maintenance position can be changed. However, each time will cause the list to need reapproval.
- It is recommended to use a change loop in the workflow to approve changes to position.

Change maintenance position on isolation point

1. On the Isolation Points tab, find the Isolation point and click the **Change** icon.

#	NAME	POSITIONS
1	80EG001A	SP Open MP Open  Change maintenance position
2	83FO5212	SP Open MP Open 
3	80GK101A-Q07	SP Open MP Closed 

2. Click the drop-down arrow and select the new Maintenance position from the list.



3. (Optional) Add a comment about why you are changing the position.
4. Click **Change** on the dialog box.
5. Click **Save changes** at the bottom of the screen.

#	NAME	POSITIONS	
1	80EG001A	SP	Open
		MP	Open
		NMP	Closed
2	83FO5212	SP	Open
		MP	Open
3	80GK101A-Q07	SP	Open
		MP	Closed

The New Maintenance Position appears in yellow until the list is approved for changes. When approved, the position text will change to black.

Add system locks to isolation points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the

dynamic configuration interface in OSM Administration.

Add locks to isolation points

You can add one System Lock and multiple [Personal Locks](#) for each isolation point.

Add a system lock to an isolation point

1. Click the **Add** icon next to System Lock.

#	NAME	CIRCUIT/TAG	LOCK NUMBER
1	83FO5212		42 Personal lock
2	86RWS5000		System lock Add system lock Personal lock
3	62L0036		System lock Personal lock

2. On the **Add system lock** dialog box, enter a lock number.
3. Optionally, you can select a person to add a lock on behalf of.
4. Click **Add**.

70CRU30C-B273 - Add system lock X

Lock number *

Allowed characters: A-Z / 0-9 / _ / - / .

ON BEHALF OF

 ↔

Add Cancel

5. Click **Save changes** at the bottom of the screen.
The lock is added and the **Lock** icon appears in red.

#	NAME	CIRCUIT/TAG	LOCK NUMBER
1	83FO5212		42
			Personal lock
2	86RWS5000		552
			Personal lock

Removing system locks

You can remove a system lock by clicking the **Delete** icon next to the lock.

Deleted locks will disappear from list. However, you can re-add a lock with same number later.

View the log for locks

- Click the **Log** icon to see a log history of when locks were added or removed and by who. See also [Viewing the log for lock and state changes](#).

83FO5212 - Log for isolation point X

LOCK NUMBER	ADDED	ADDED BY	REMOVED	REMOVED BY
P8	17/03/21 13:06	[REDACTED]		
42	16/03/21 11:15	[REDACTED]		

OK

Icons

These icons are related to locks.

Icon	Description
	Click the Add icon to add a lock.
	Indicates a system lock is in place on this Isolation point.

Icon	Description
	Indicates a personal lock is in place on this Isolation point.
	Hover over the information icon to see details about who added a lock.
	Click the Delete icon to delete the lock.
	Click the Log icon to view the history of what locks were added or removed from this Isolation point.

Add personal locks to isolation points



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

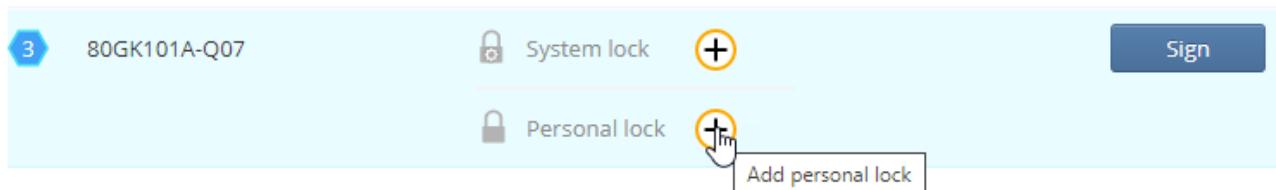
Adding personal locks to isolation points

You can add one [System Lock](#) and multiple Personal Locks for each isolation point.

The Lock number of personal lock must be unique for a point, due to multiple personal locks for same point.

Add a personal lock to an isolation point

1. Click the **Add** icon next to Personal Lock.



2. On the **Add personal lock** dialog box, enter a lock number.
3. Optionally, you can select a person to add a lock on behalf of.
4. Click **Add**.

80GK101A-Q07 - Add personal lock X

Lock number *

Allowed characters: A-Z / 0-9 / _ / - / .

ON BEHALF OF

 ↔AddCancel

5. Click **Save changes** at the bottom of the screen.

The lock is added and a **Lock** icon appears at the end of the row.

3	80GK101A-Q07	+	+
	+ P12	+	+
	+ Personal lock	+	+

Notice that another row for Personal lock appears. You can add multiple Personal locks.

Removing personal locks

You can remove a personal lock by clicking the **Delete** - icon next to the lock.

Deleted locks will disappear from list. However, you can re-add a lock with same number later.

View the Log for locks

- Click the **Log** ⌚ icon to see a log history of when locks were added or removed and by who. See also [Viewing the log for lock and state changes](#).

83FO5212 - Log for isolation point X

LOCK NUMBER	ADDED	ADDED BY	REMOVED	REMOVED BY
P8	17/03/21 13:06	[REDACTED]		
42	16/03/21 11:15	[REDACTED]		

OK

Icons

These icons are related to locks.

Icon	Description
	Click the Add icon to add a lock.
	Indicates a system lock is in place on this Isolation point.
	Indicates a personal lock is in place on this Isolation point.
	Hover over the information icon to see details about who added a lock.
	Click the Delete icon to delete the lock.
	Click the Log icon to view the history of what locks were added or removed from this point.

Sign for isolated on an isolation point



Dynamic configuration The availability of this feature depends on the functionality being enabled in the

dynamic configuration interface in OSM Administration.

Isolation points in an isolation list

An isolation list is an ordered list of isolation points. Depending on configuration for the status of the isolation list, you can [add points](#) and reorder the points.

Important: Each point needs to be signed off as isolated before work can begin.

#	NAME	CIRCUIT/TAG	LOCK NUMBER	ISOLATED	VIEW	SIGN	RESET	VERIFY ISOLATED	VERIFY RESET	TESTED
1	83FO5212		42 Personal lock	Sign	Sign	Sign	Sign	Sign	Sign	
2	86RWS5000		552 Personal lock	Sign	Sign	Sign	Sign	Sign	Sign	
3	62L0036		System lock Personal lock	Sign	Sign	Sign	Sign	Sign	Sign	
4	86RY5005		System lock Personal lock	Sign	Sign	Sign	Sign	Sign	Sign	
5	80IC001B		System lock Personal lock	Sign	Sign	Sign	Sign	Sign	Sign	

Sign for Isolated on an isolation point

- Select a point and in the **Isolated** column, click **Sign multiple** to sign for multiple points or **Sign** to sign for an individual point. If existing signatures exist on some points, applying **Sign Multiple** will not override the existing signatures.

#	NAME	CIRCUIT/TAG	LOCK NUMBER	ISOLATED
1	83FO5212		42 Personal lock	Sign
2	86RWS5000		552 Personal lock	Sign

- Optionally, you can select a person to sign on behalf of.
- Click **Sign**. The signature and timedate stamp appear in the table.

83FO5212 - Isolated X

SIGNED BY  DATE AND TIME
08/12/21 13:21

SIGN ON BEHALF OF ↔

Sign Cancel

4. Click **Save Changes**.

Sign for Verified Isolated on an isolation point

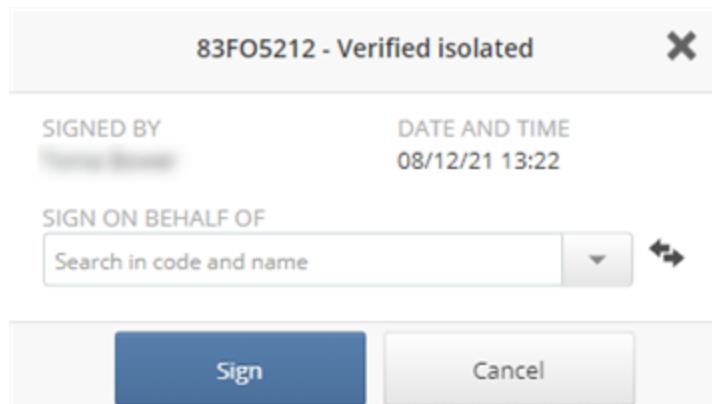
 **Dynamic configuration** The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Sign for Verified Isolated on an isolation point

1. Select a point and under the **Verified Isolated** column, click **Sign multiple** to sign for multiple points or **Sign** to sign for an individual point. If existing signatures exist on some points, applying Sign Multiple will not override the existing signatures.

#	NAME	CIRCUIT/TAG	LOCK NUMBER	ISOLATED	VERIFIED ISOLATED
1	83FO5212		i - lock 42 + lock Personal lock	Sign	Sign
2	86RWS5000		i - lock 552 + lock Personal lock	Sign	Sign

2. Optionally, you can select a person to sign on behalf of.
3. Click **Sign**. The signature and timedate stamp appear in the table.



- Click **Save Changes**.

Sign for Reset on an isolation point

 **Dynamic configuration** The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Resetting isolation points in an isolation list

Each Isolation Point needs to be signed off as isolated before work can begin.

Important: After work is complete, the point needs to be signed off as reset to the position that point must be restored to.

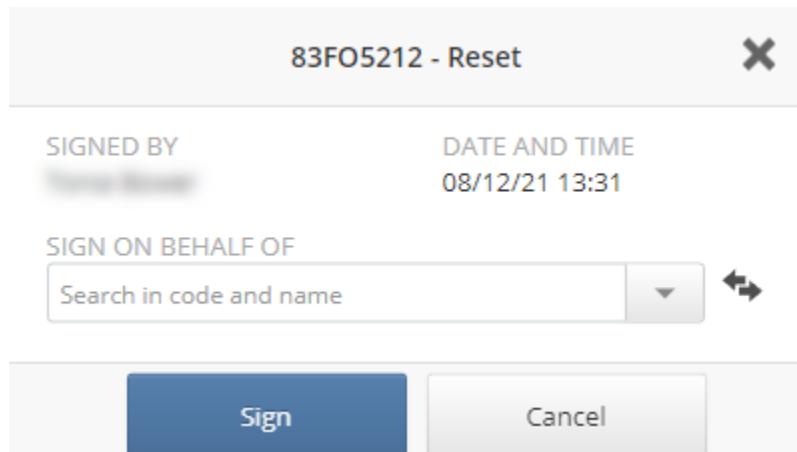
#	NAME	CIRCUIT/TAG	LOCK NUMBER	ISOLATED	VERIFIED ISOLATED	RESET	VERIFIED RESET
1	83FO5212		42 	08/12/21 16:25	08/12/21 16:25		
2	86RW55000		552 				

Sign for Reset on an isolation point

- Select a point and under the **Reset** column, click **Sign multiple** to sign for multiple points or **Sign** to sign for an individual point. If existing signatures exist on some points, applying **Sign Multiple** will not override the existing signatures.

#	NAME	CIRCUIT/TAG	LOCK NUMBER	ISOLATED	VERIFIED ISOLATED	RESET	VERIFIED RESET
1	83FO5212		42 	08/12/21 16:25	08/12/21 16:25		
2	86RW55000		552 	08/12/21 13:27 Arne Beyer	08/12/21 13:28 Thor Arnold		

2. Optionally, you can select a person to sign on behalf of.
3. Click **Sign**. The signature and timedate stamp appear in the table.



4. Click **Save Changes**.

Sign for Verified Reset on an isolation point



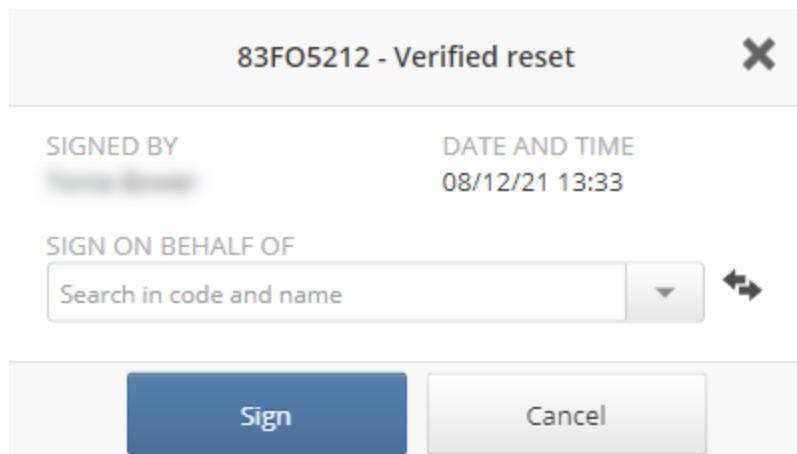
Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Sign for Verified Reset on an isolation point

1. Select a point and under the **Verified Reset** column, click **Sign multiple** to sign for multiple points or **Sign** to sign for an individual point. If existing signatures exist on some points, applying **Sign Multiple** will not override the existing signatures.

#	NAME	CIRCUIT/TAG	LOCK NUMBER	ISOLATED	VERIFIED ISOLATED	RESET	VERIFIED RESET
1	83FO5212		42 Personal lock	08/12/21 16:25	08/12/21 16:25	08/12/21 13:31	Sign
2	86RWS5000		552 Personal lock	08/12/21 16:29	08/12/21 16:29	Sign	Sign

2. Optionally, you can select a person to sign on behalf of.
3. Click **Sign**. The signature and timedate stamp appear in the table.



4. Click **Save Changes**.

Sign for Test on an isolation point



Dynamic configuration The availability of this feature depends on the functionality being enabled in the dynamic configuration interface in OSM Administration.

Testing an isolation point

While going through the [Isolation List workflow](#), you can sign for testing on the isolation points when Test functionality is configured to be visible.

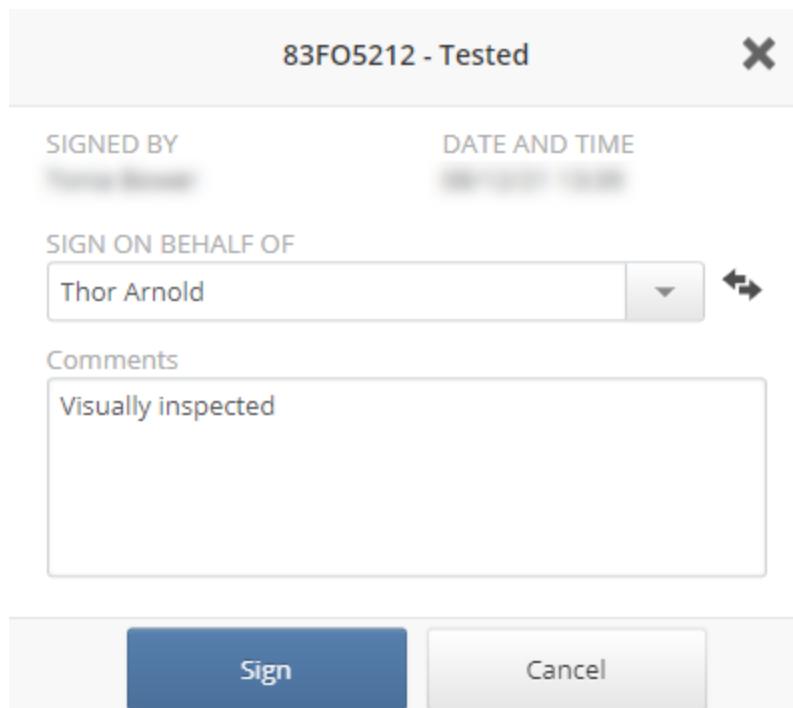
Sign for Test on an isolation point

1. Select a point and under the **Tested** column, click **Sign multiple** to sign for multiple points or **Sign** to sign for an individual point. If existing signatures exist on some points, applying **Sign Multiple** will not override the existing signatures.



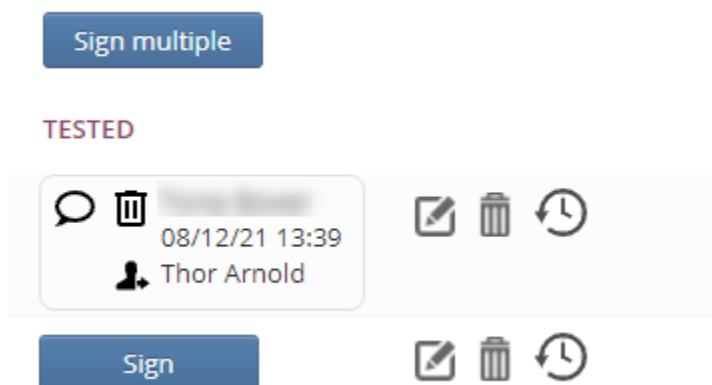
The Tested dialog box opens.

2. (Optional) You can sign on behalf on another person and add comments if you like.



3. Click **Sign**.

The signature and timedeate stamp appear in the table.



Icons

These icons relate to signing for Tested.

Icon	Description
	Hover over the comment icon to see any comments for this point.
	Click the Delete icon to delete the signature.

Risk Assessments

This section contains topics that relate to Risk Assessments.



Risk Assessment Library

The Risk Assessment Library holds all of the risk assessments for the current location.

The Risk Assessment module gives you the ability to visualize associated risks. This module has huge flexibility of configuration.

What is a risk assessment?

A Risk Assessment is the result of breaking down a job into individual tasks and analyzing the risk of each individual task. A calculation is made for the overall risk assessment of the entire job.

Library tabs

The Risk Assessment library page has these tabs.

<ul style="list-style-type: none">• Browse All	The Browse All tab lists all the Risk Assessments for a particular location.
<ul style="list-style-type: none">• My Work	The My Work tab shows only those Risk Assessments for a particular location that are added to current user's My Work.

The screenshot shows the 'Risk assessments' library page. At the top, there are tabs for 'BROWSE ALL (2)' and 'MY WORK (0)'. Below the tabs, a header bar includes a plus icon, the text 'Browse all (2) | AVEVA Demo Site', and filter icons for Status, Number, Title, SY, AR, DI, Valid From, and Valid To. The main area lists two risk assessments:

STATUS	NUMBER	TITLE	SY	AR	DI	VALID FROM	VALID TO
New	TRA-000002	Entering oil tank for internal inspection	30	P20	M		0
Approved	TRA-000001	Entering high pressure vessel for inter...	30	P20	M		1

At the bottom right, there are navigation icons for Home, Back, Forward, and Search, along with a page indicator 'PAGE 1 OF 1'.

Browse all risk assessments

The **Browse All** tab displays all the risk assessments in the library for this location.

View details of a risk assessment

- Double-click a risk assessment in the library to see the [details](#) of the risk assessment.

Add a new risk assessment

- Click the **Add** icon to create a new risk assessment.

Add a risk assessment to My Work

- Click the **Star** icon to add the risk assessment to [My Work](#). When an item is selected, the star turns yellow .

This screenshot shows the same 'Risk assessments' library page as the previous one, but with a different scroll position. The content and structure are identical, displaying the two risk assessments and the same navigation elements at the bottom.

Library icons

These icons appear on the Library page.

Icon	Name	Description
	My Work icon	Click the star icon to add the item to My Work .
	Signature icon	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status icon	Indicates the current status of the item.
	Process Workflow icon	Click the Workflow icon to show all the available processes for the current item.

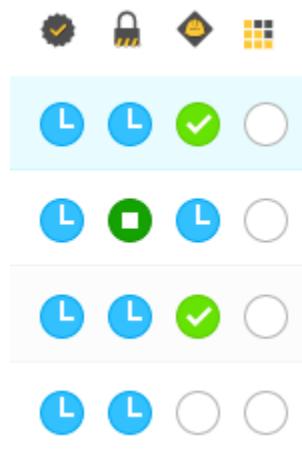
Linked entities

The icons in the right-most columns represents the linked entities to a Risk Assessment.

Icon	Description
	Linked work orders
	Linked work permits

Status Indicators

The displayed status icon represents the lowest status among the linked entities. For more information, see [Status Indicator icons](#).



My Work

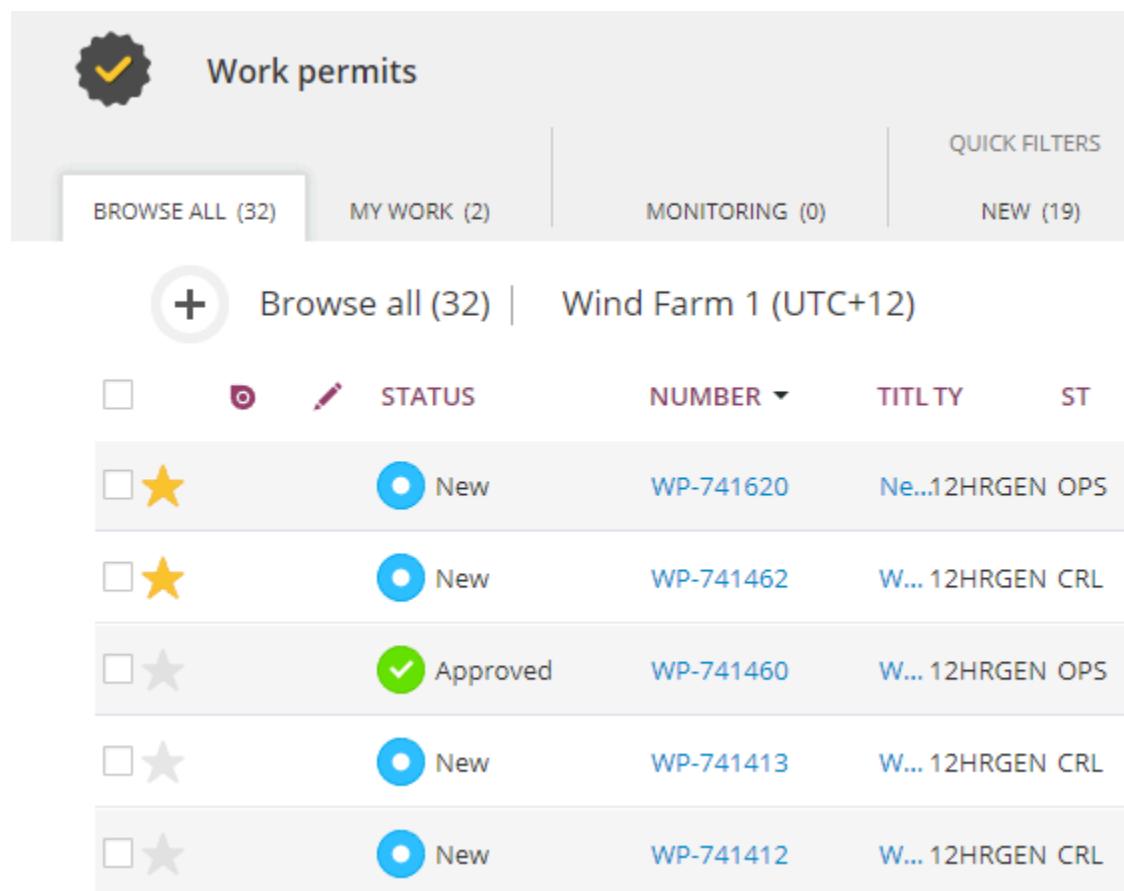
Add a risk assessment to My Work

- Click the **Star** icon  to add the risk assessment to [My Work](#). Click the star again to remove it from My Work.

Items with a yellow star  will appear in your My Work list .

Filtering in My Work

It's possible to further refine search criteria, but this query will not be restored next time you open My Work.



The screenshot shows a search interface for 'Work permits'. At the top, there is a circular badge with a checkmark and the text 'Work permits'. Below it are four buttons: 'BROWSE ALL (32)', 'MY WORK (2)' (which is highlighted in orange), 'MONITORING (0)', and 'NEW (19)'. To the right of these buttons is a 'QUICK FILTERS' link. Below the buttons, there is a search bar with a '+' icon and the text 'Browse all (32) | Wind Farm 1 (UTC+12)'. The main area displays a table with columns: STATUS, NUMBER, TITLE, and ST. There are five rows of data, each with a checkbox, a yellow star icon, a blue circle icon, and a status label (New or Approved). The first row is highlighted with a light gray background.

STATUS	NUMBER	TITLE	ST
<input type="checkbox"/> 	 New	WP-741620	Ne...12HRCGEN OPS
<input type="checkbox"/> 	 New	WP-741462	W... 12HRCGEN CRL
<input type="checkbox"/> 	 Approved	WP-741460	W... 12HRCGEN OPS
<input type="checkbox"/> 	 New	WP-741413	W... 12HRCGEN CRL
<input type="checkbox"/> 	 New	WP-741412	W... 12HRCGEN CRL

Work with risk assessments

- [Create new risk assessment](#)
- [Fill out risk assessment fields](#)
- [Add tasks to procedure](#)
- [Add hazards to tasks](#)

Create new risk assessment

You can create a new Risk Assessment from the [OSM Home page](#) or from the library page.



Create from Library page

1. On the Risk Assessment Library page, click the Add button.
 2. On the Create new risk assessment screen, enter the details. The fields with a blue star indicate required information.
- For more information, see [Fill out risk assessment fields](#).
3. Click **Create new risk assessment**.

The screenshot shows a form titled "Create new risk assessment". The form includes the following fields:

- Title ***: A text input field with placeholder text "Type a title for this risk assessment".
- Description ***: A large text area for entering a description.
- Site ***: A dropdown menu set to "WFM1 - Wind Farm 1".
- Type ***: A dropdown menu with placeholder text "Select/search in code and name".
- Responsible**: A dropdown menu with placeholder text "Select user / search in user name".
- Area**: A dropdown menu with placeholder text "Select/search in code and name".
- System**: A dropdown menu with placeholder text "Select/search in code and name".
- Valid from**: An empty text input field.
- Valid to**: An empty text input field.
- Discipline**: A dropdown menu with placeholder text "Select/search in code and name".

At the bottom right of the form, there is a note: *** Required fields**. At the very bottom, there are three buttons: Create another, **Create new risk assessment** (in a blue button), and Cancel.

Fill out risk assessment fields

These are the fields on Create new risk assessment form. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	Add a title for the procedure that requires the risk assessment.
• <i>Number</i>	The form number will be auto-generated with a prefix.
• <i>Description*</i>	Add a description of the procedure.
• <i>Site*</i>	Select the Site where the procedure will be performed.
• <i>Type*</i>	Select the type of risk matrix to apply to this procedure.
• <i>Responsible</i>	Add the name of the person responsible for the risk assessment.
• <i>Area</i>	You can select an Area of the Site.
• <i>System</i>	You can specify the type of system.
• <i>Discipline</i>	
• <i>Valid from</i>	The start date that the assessment will be valid.
• <i>Valid to</i>	The end date that the assessment will be valid.

The screenshot shows the 'Create new risk assessment' page. At the top left is a yellow square icon with a black grid pattern. To its right is the title 'Create new risk assessment'. Below this are two input fields: 'Title *' with a placeholder 'Type a title for this risk assessment' and 'Number' with a placeholder '[To be generated]'. A large text area for 'Description *' follows. Below these are several dropdown or search fields: 'Site *' (set to 'WFM1 - Wind Farm 1'), 'Responsible' (with a double-headed arrow icon), 'Area', 'System', 'Type *' (placeholder 'Select/search in code and name'), 'Valid from', 'Valid to', and 'Discipline'. At the bottom right of the form is a note '* Required fields'. At the very bottom are three buttons: a checkbox for 'Create another', a blue 'Create new risk assessment' button, and a 'Cancel' link.

Add tasks to procedure

Adding tasks

The **Tasks** section enables you to view, add, edit, or remove tasks from a procedure. The risk of each task affects the overall risk of the entire procedure.

Edit and Delete options are available for tasks as per Risk Assessment editable status. For example, tasks cannot be edited or deleted after a Risk Assessment is approved. Hazards and measures for a task can be modified inside an edit popup for individual task.

Add new task

1. Click the **Add (+)** button to add a new task. The Add a new task window appears.
2. Add a title do describe the task. A task is one of the steps in the overall procedure.

Add a new task

Task (1 of 1) —

1 Stabilize boom lift when in position

Add hazards and consequences

1. Add any possible **hazards** that relate to the task.
2. Add the possible consequence of the hazard.

Hazards (1) —

HAZARDS	POTENTIAL CONSEQUENCE
What hazards can this task involve?	Who and what is at risk?
1.1 Unstable boom lift	Worker in lift could fall out

3. Give ratings to the Current hazard and consequences.
 - What is the probability of this happening?
 - How serious is the consequence if it does happen?

CURRENT			RESIDUAL			CURRENT			RESIDUAL		
PROB	CONS	Risk.	PROB	CONS	Risk.	PROB	CONS	Risk.	PROB	CONS	Risk.
P						P			P		
R - Rare						1 - Negligible			1 - Negligible		
U - Unlikely						2 - Minor			2 - Minor		
P - Possible						3 - Major			3 - Major		
L - Likely						4 - Critical			4 - Critical		
V - Very Likely						5 - Catastrophic			5 - Catastrophic		
or this measure...						easure...					

When you put both values in for the Current Risk, the risk rating for this task is automatically determined.

CURRENT			RESIDUAL		
PROB	CONS	Risk.	PROB	CONS	Risk.
P	5	P5			

Add mitigating measures

1. Add any **measures** that will be taken to mitigate the risk of a hazard.

MITIGATING MEASURES

1.1.1	Extend outrigger stabilizing legs
1.1.2	Put pads under stabilizing legs

2. Add the name of the responsible person for each mitigating measure.

MITIGATING MEASURES	RESPONSIBLE
1.1.1 Extend outrigger stabilizing legs	Thor Arnold
1.1.2 Put pads under stabilizing legs	Arne Beyer

3. Give ratings to the Residual hazard and consequences.

- After measures are taken, what is the probability of this happening?
- After measures are taken, what is the likely consequence of the hazard?

When you put both values in for the Residual Risk, the risk rating for this task is automatically determined.



4. Click **Add** to add the task to the procedure.

Add hazards to tasks

Hazards

Each task can have multiple hazards, and each hazard can have multiple measures.

The risk is evaluated per hazard by the user. A task's risk will be automatically calculated based on the probability and possible consequences of the hazard.

3	Entry in conjunction with the start of work					
HAZARDS		POTENTIAL CONSEQUENCE				
3.1 Slippery floors inside the tank, so that one slides and tumbles.		Injury to personnel				
MITIGATING MEASURES		RESPONSIBLE				
3.1.1 Grid on the floor and Personal protection		ABC				
3.1.2 Sufficient light.		ABC				
3.1.3 Entry guard.		ABC				
3.1.4 Communication between the various players.		ABC				
3.2 Hydrocarbons within the tank.		RESPONSIBLE				
MITIGATING MEASURES						
3.2.1 Open manholes and ventilate for 2 hours before entering.		ABC				
3.2.2 Gas Measurement before one enters the tank.		ABC				

Confirm ALARP

ALARP

Each task has an option for setting **ALARP** – which means *As low as reasonably possible*.

[ALARP](#)



The Risk Assessment will be approved only after all its tasks have ALARP confirmed.

Each task in the procedure must have mitigating measures applied to make the risk *As low as reasonably possible*.

Tasks (3)		Show	Re-order	CURRENT	RESIDUAL	ALARP
#	TASK					
> 1	Bring Boom Lift to windmill location			P3	U2	
> 2	Stabilize Boom Lift when in position			U5	U2	
> 3	Inspect the fittings between blades for corrosion			P5	R2	

Reorder tasks

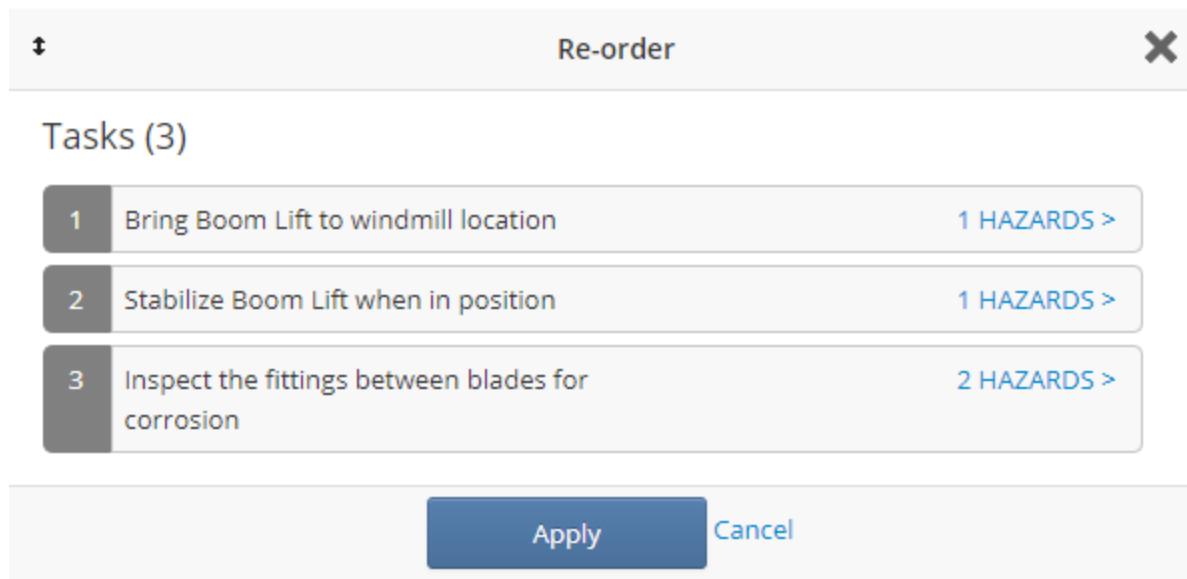
You can reorder already added tasks, hazards, and measures.

Change the order of tasks

1. When you click the **Re-order** button, a window opens which will show list of all tasks.

[Show](#) [Re-order](#)

2. Drag and drop to change the order of tasks.
3. Click **Apply**.



Each task displays a link to its hazards (2 HAZARDS). You can also change the order of hazards.
See [Reorder hazards](#).

Reorder hazards

You can reorder already added tasks, hazards, and measures.

When you click the **Re-order** button, a window opens that shows a list of all tasks.

Show Re-order

Reorder hazards for a task

1. On the Re-order dialog box, click the Hazards link to the right of each Task; for example, 2 HAZARDS.

The screenshot shows a modal dialog titled "Re-order" with the sub-section "Tasks (5)". It lists five tasks with their hazard counts:

- 1 Prepare tank before entering (1 HAZARDS >)
- 2 Verify that all equipment is isolated (1 HAZARDS >)
- 3 Entry in conjunction with the start of work (2 HAZARDS >)
- 4 Continuous gas measurement (1 HAZARDS >)
- 5 Completion of work (2 HAZARDS >)

At the bottom of the dialog are two buttons: "Apply" and "Cancel".

You will see a list of hazards for the particular task.

2. Drag and drop the hazards to reorder them.

The screenshot shows the "Selected Task" section for task number 3, "Entry in conjunction with the start of work". Below it is the "Hazards (2)" section, which lists two hazards with their measure counts:

- 3.1 Slippery floors inside the tank, so that one slides and tumbles. (4 MEASURES >)
- 3.2 Hydrocarbons within the tank. (2 MEASURES >)

At the bottom of this section are two buttons: "Apply" and "Cancel".

3. Click **Apply**.

Each hazard displays a link to its measures (4 MEASURES). You can also change the order of measures.

See [Reorder measures](#).

Reorder measures

You can reorder already added tasks, hazards, and measures.

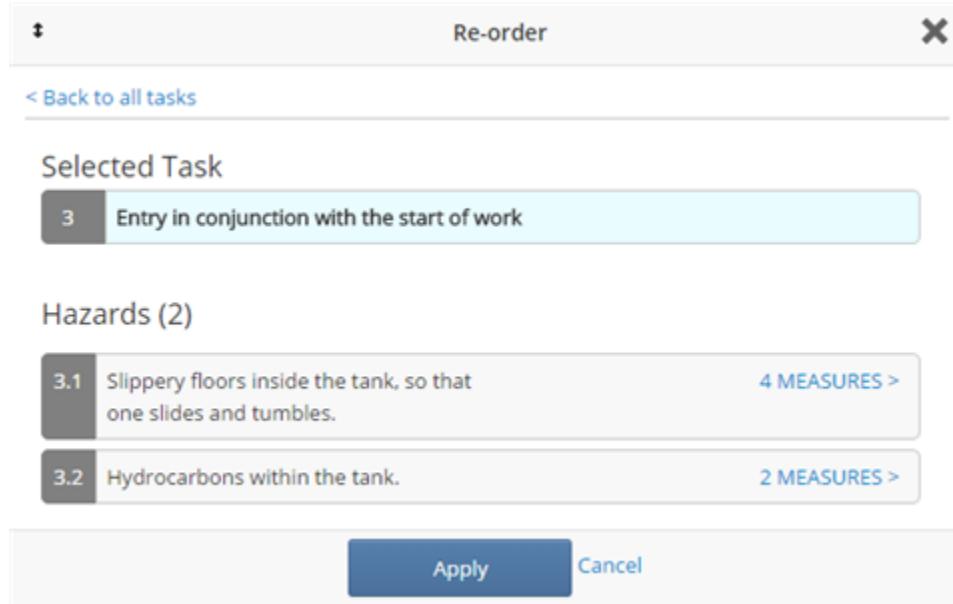
When you click the **Re-order** button, a window opens that shows a list of all tasks.



Each task will have link to its hazards. You can change the sequence (order) of hazards.

Reorder measures for a hazard

1. On the Re-order dialog box, click the Measures link to the right of a Hazard; for example, 4 MEASURES.



The screenshot shows the 'Re-order' dialog box. At the top, there's a header with a back arrow, the title 'Re-order', and a close button. Below the header is a link to 'Back to all tasks'. The main area is titled 'Selected Task' and contains a list item '3 Entry in conjunction with the start of work'. Below this, under 'Hazards (2)', are two items: '3.1 Slippery floors inside the tank, so that one slides and tumbles.' with a '4 MEASURES >' link, and '3.2 Hydrocarbons within the tank.' with a '2 MEASURES >' link. At the bottom of the dialog are 'Apply' and 'Cancel' buttons.

2. Drag and drop the measure rows to reorder them.

The screenshot shows a modal dialog titled "Re-order" with a close button "X" at the top right. At the top left is a small icon with a plus sign. Below the title, there is a link "[Back to all hazards](#)". The main area is titled "Selected Hazard" and contains a list of measures. The first measure is highlighted with a dark grey background and white text: "3 Entry in conjunction with the start of work". Below it is a sub-measure: "3.1 Slippery floors inside the tank, so that one slides and tumbles." The list continues with four more measures: "3.1.1 Grid on the floor and Personal protection", "3.1.2 Sufficient light.", "3.1.3 Entry guard.", and "3.1.4 Communication between the various players.". At the bottom of the dialog are two buttons: "Apply" (in blue) and "Cancel" (in light blue). A cursor arrow points towards the "Apply" button.

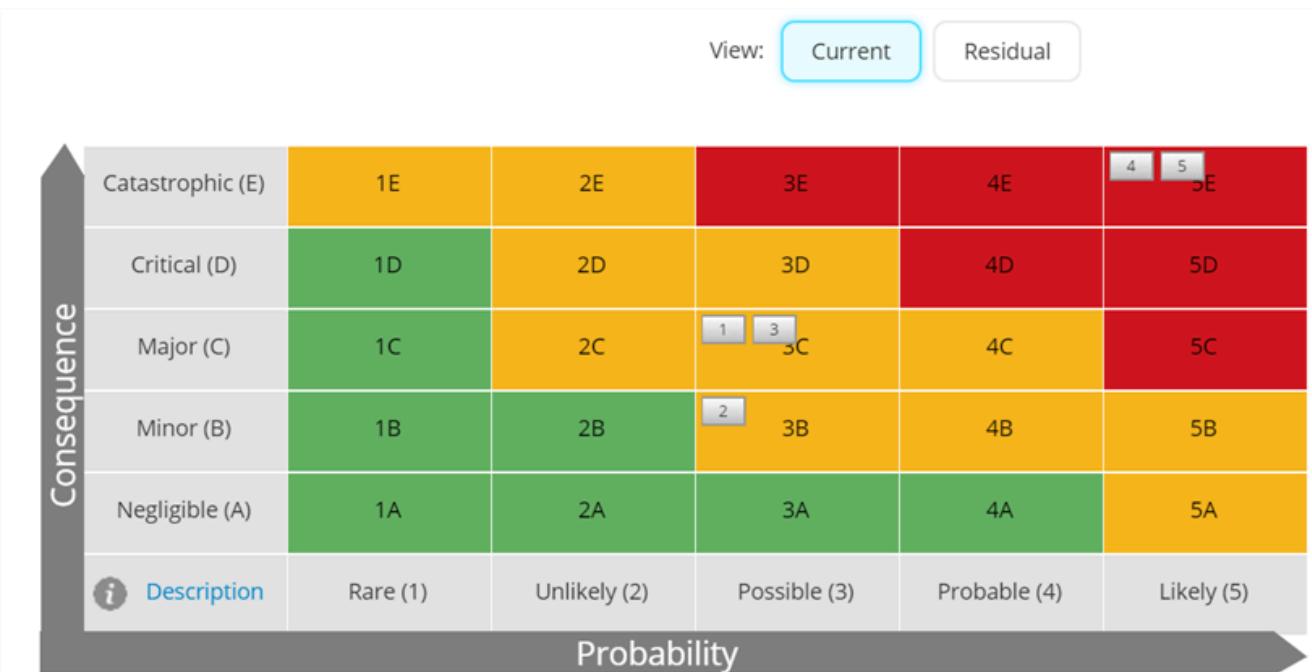
3. Click **Apply**.

Risk matrix examples

Examples for risk matrices.

Example

Currently, Task number 1, 2, and 3 are in amber zone and task numbers 4 and 5 are in red zone. After taking appropriate measures, the Residual risk view shows that all tasks are in green zone.



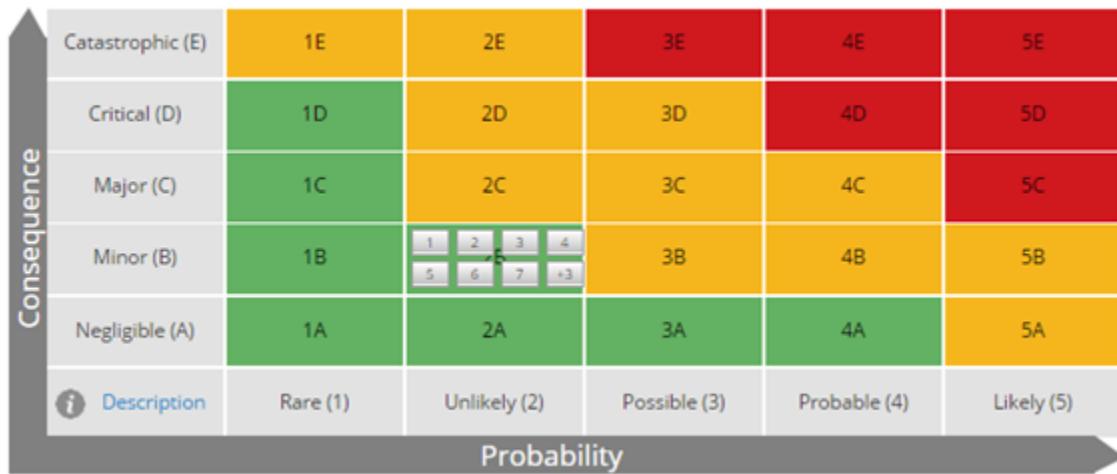
Example

In some cases, multiple tasks may fall into same cell. Then, the last box will show "+<number of remaining tasks>".



Example

In picture below, residual risk for 10 tasks fall in same cell, so it will be shown like this.



Individual task numbers falling into this cell are:

1, 2, 3, 4, 5, 6, 7

+3 indicates that there are 3 more task numbers which fall into this cell. When user mouse hover, those task Ids are shown as below

Tasks: 8, 9, 10



Details for risk assessments

Details tabs for risk assessments

When you click on a Risk Assessment in the [Risk Assessment Library](#), you can access an overview of the details for that specific Risk Assessment.

Open a risk assessment

- Double-click a Risk Assessment in the Library.

Risk Assessment tabs

Each Risk Assessment has several tabs containing the details about the Risk Assessment.

OVERVIEW

REFERENCES (2)

ATTACHMENTS (0)

SIGNATURES (0)

LOGS

• Overview	See an overview of the Risk Assessment.
• References	View references for the Risk Assessment.
• Attachments	Add attachments to the Risk Assessment.
• Signatures	View signatures for the Risk Assessment.
• Logs	View log for the Risk Assessment.

Process workflow on risk assessment

The processes that you can perform will depend on the access you have in the configuration.

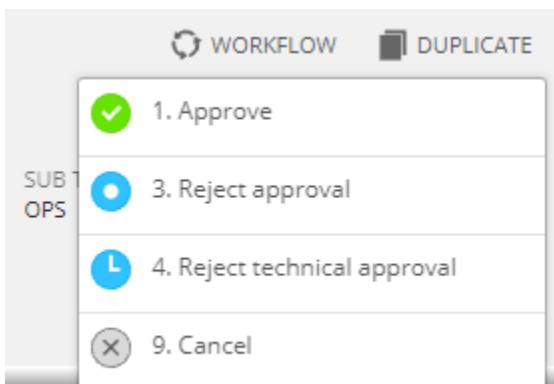
Perform workflow

1. In the Details view, click the **Workflow** icon in the upper-right corner.



A list of processes displays.

2. Select a process to perform.



The **Workflow** dialog box appears.

3. Review the [Summary](#) section that this is the operation you want to perform.
4. If signatures are required, sign in the [Signatures](#) section
5. If a message is required, write a message in the [Send to Co-worker](#) section.
6. Click **Perform process**.

The screenshot shows the 'Workflow' dialog box. At the top is the 'Summary' section with three boxes: 'CURRENT STATUS' (blue icon, 150 - For approval), 'PROCESS' (1. Approve), and 'NEXT STATUS' (green checkmark, 200 - Approved). Below this is the 'Signatures' section, which includes fields for 'SIGNATURE REQUIRED' (checkboxes for 'Area responsible', 'Operation supervisor', and 'Central Control Room'), 'SIGNED BY' (three placeholder icons), and 'SIGN ON BEHALF OF' (three dropdown menus labeled 'Select/search in code and name'). At the bottom are three buttons: 'Apply signatures' (disabled), 'Perform process' (disabled), and 'Cancel'.

Duplicate

Duplicating a work permit

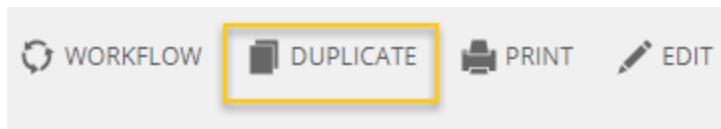
When duplicating a work permit, you can specify what elements of the work permit to duplicate.

Notes

- It will not be possible to duplicate a work permit where the work permit type is set to *Inactive* or *Obsolete* in the system.
- If a work permit form template has been changed, it will not be possible to duplicate the content. The **Copy contents from Work permit form** checkbox will be disabled and it will no longer be possible to copy the layout and configuration of form because the form template has changed.

Duplicate a work permit

1. On the Work Permit details page, click **Duplicate** in the information header.



The Duplicate form appears.

2. Select the options that you want to duplicate to the new work permit and click **Duplicate**.

Duplicate work permit WP-738365

Select what to duplicate from options below

Copy contents from work permit form
 Include isolation lists ...
 Include risk assessments ...
 Copy supplementary forms ...
 Based on original template
 Copy form with contents
 Create links to
 Tags
 Work order
 Safe job analysis
 Copy
 Competencies
 Attachments

Take me to the duplicated item Add to My Work

Edit a risk assessment

Edit a risk assessment

1. In the Details view, click the **Edit** icon in the upper-right corner.



2. On the Edit form, edit the details. For more information, see [Fill out risk assessment fields](#).

3. Click **Save changes**.

The screenshot shows a web-based form titled "Update risk assessment TRA-0002401". The form has the following fields:

- Title ***: Risk assessment for heavy lifting
- Description ***: Risk assessment for heavy lifting
- Site (UTC+13) ***: WFM1 - Wind Farm 1
- Type ***: RSK-BLADES - Risk Assessment for Blade Work
- Responsible**: Harald Englund
- Area**: TAN - Turbine Fields North
- System**: Search in code and name
- Valid from**: 10/02/22
- Valid to**: 12/31/22
- Discipline**: Search in code and name

At the bottom right, there is a note: *** Required fields**. Below the form are two buttons: **Save changes** (highlighted in blue) and **Cancel**.

Overview of risk assessment

Breaking down risks

The Risk Assessment module helps users to assess the risk of any scenario/task/set of tasks.

You can divide a large procedure into sub-tasks and then assess the risk on individual task.

You can then enter hazards as they relate to each task and measures for each of the hazards, so that risk can be reduced to As Low As Reasonably Possible (ALARP).

Information header

The **Information header** across the top of the screen provides details about the form and action buttons.

Overview tab

The **Overview** tab provides overall Risk Overview for current risk assessment. It contains three sections.

<ul style="list-style-type: none">Risk overview	This section gives an overview of the risk by providing numeric scores for initial risk and residual risk.. <ul style="list-style-type: none"><i>Initial Risk</i> provides numbers initially, meaning
---	---

	<p>before applying any measures for risk.</p> <ul style="list-style-type: none"> • <i>Residual Risk</i> provides numbers after applying measures.
• Risk matrix	This section shows the configured risk matrix. It has two views – Current and Residual.
• View tasks	This section enables you to add, edit, remove any of the tasks that are associated with the current Risk Assessment.

The screenshot shows the AVEVA OSM Web User Guide interface. At the top, there's a navigation bar with a logo, the text "RISK ASSESSMENTS > TRA-0000025", and a dropdown menu. Below the header, the main content area is titled "TRA-0000025 Inspection inside Separator". It includes a status bar with fields like "STATUS 100 - New", "ASSET Asset A", "AREA General Hod", etc. Below this are tabs for "OVERVIEW", "REFERENCES (2)", "ATTACHMENTS (0)", "SIGNATURES (0)", and "LOGS". The "OVERVIEW" tab is selected. Under "OVERVIEW", there's a "Risk Overview" section with "INITIAL RISK" and "RESIDUAL RISK" counters (all 0) and a "RESPONSIBLE" dropdown. To the right is a "COMMENTS" text area. Below the overview are links to "Risk Matrix" and "Tasks (0)".

Risk overview

The **Overview** section shows the overall current and residual risk which is calculated from the risk of the individual tasks in the [Tasks](#) section.

- *Current risk* provides numbers initially, meaning before applying any measures for risk.
- *Residual risk* provides numbers after applying measures.

Example - In the picture below, it means that currently 3 of the total tasks fall in amber range of risk matrix, while 2 of them fall in red range of risk matrix.

After applying respective measures for task hazards, residual risk for all tasks (5 tasks) is now in green area of risk matrix.

CURRENT RISK 0 3 2

RESIDUAL RISK 5 0 0

Person responsible

The Risk overview also shows the name of the person who is 'Responsible' for Risk Assessment, and 'comments', if any for current Risk Assessment.

- Both of these fields can be modified in all editable statuses.

The person responsible for current risk assessment can be seen/added/edited as below.



The default mode is to pick a person from users list. But you can also use **Switch** icon to change to free text. You can add comments related to current risk assessment in text area provided for comments.

Risk matrix

The **Risk Matrix** section of the [Overview tab](#) shows the matrix as per configured fields. It has two views – Initial and Residual.

Switch views

- Click **Initial** or **Residual** to show the risk matrix with tasks numbers associated with this Risk Assessment.



The tasks for Risk Assessment are plotted on risk matrix and identified with task number.



You can click **Description** in the matrix to open a window with a description of the particular risk assessment configuration for your company.

A RISK ASSESSMENTS > TRA-0000025

 TRA-0000025 Inspection inside Separator
This risk assessment is required for entering into the ta...

L	STATUS	ASSET	AREA	SYSTEM	DISCIPLINE	RESPONSIBLE	VALID FROM	VALID TO	CREATED BY	CREATED	LAST CHANGED BY	LAST CHANGED
	100 - New	Asset A	General Hod	GENERAL	Inspection		01/02/17	12/02/17		15/12/16		15/12/16

OVERVIEW REFERENCES (2) ATTACHMENTS (0) SIGNATURES (0) LOGS

> Risk Overview

▼ Risk Matrix

View: Initial Residual

Consequence	1E	2E	3E	4E	5E
Catastrophic (E)	1E	2E	3E	4E	5E
Critical (D)	1D	2D	3D	4D	5D
Major (C)	1C	2C	3C	4C	5C
Minor (B)	1B	2B	3B	4B	5B
Negligible (A)	1A	2A	3A	4A	5A
Description	Rare (1)	Unlikely (2)	Possible (3)	Probable (4)	Likely (5)

Probability

View tasks

The **Tasks** section of the [Overview tab](#) enables you to view, add, edit, or remove tasks from a procedure. The risk of each task affects the overall risk of the entire procedure.

View tasks

All the tasks that have been already added to a Risk Assessment will be display here in the Tasks section. If there are no tasks added, then only **Add new task** heading will be shown with + icon. See [Add tasks to procedure](#).

Task list

After adding tasks, the section will look like the example below, with task number along with the description, current and residual risk, ALARP button and options to edit or delete task.

Tasks (5)

Add new task Show Re-order

#	TASK	CURRENT	RESIDUAL			
PR.	CO.	RISK.	PR.	CO.	RISK.	ALAR
1	Prepare tank before entering	RD	2B	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
2	Verify that all equipment is isolated	3C	2B	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
3	Entry in conjunction with the start of work	RD	2B	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
4	Continuous gas measurement	3D	2B	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
5	Completion of work	3D	2B	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>

References

Manage references for risk assessment

References tab

The **References** tab displays all the references for current Risk Assessment. These references can be work orders, work permits, or TAGS.

The total count of referenced entities is shown in tab heading.

Guidelines

- You can add references when work item is in editable status.
- References to be added cannot be in *Canceled* or *Closed* status.
- If work item is cancelled, all references will be removed.
- You can remove linked references when work item is in editable status.
- For some reference types, you can perform the workflow directly from References page.

Log entry for deleted read-only references

When you delete a link to read-only reference, there is now a log entry for this action. This applies for all reference types for the following work items:

Work Permit, Isolation Plan, Isolation List, Task Risk Assessment, Safe Job Analysis and Supplementary Form.

OSM makes a log entry only if the work item is in non-editable state (such as after approval). When the work item is in an editable state, there is no log entry.

- If both items are editable - no log entry
- If one item is non-editable - creates log entry
- If both items are non-editable - creates log entry

The log entry happens on both sides—on the work item side and on the reference side.

Why. Because if there is an audit, there is a record of previous associations between work items, even if these

items have been removed.

Example—An example of log entry for a deleted reference.

DESCRIPTION

Supplementary form
ST10006171 has been
removed as a reference by
user

Sections

The References tab has these sections.

- **Work orders.** Search for and add [Work Orders](#).
- **Work permits.** Search for and add [Work Permits](#).
- **Supplementary forms.** Search for and add [Supplementary Forms](#).
- **Tags.** Search for and add tags.

STATUS	NUMBER	TITLE	TY	ST	DI	VALID ...	VALID ...	VALID BETWEEN
New	WP-741802	[REDACTED]	12HRG...	CRL		09/07/22	09/07/22	07:00 - 19:00

Icons

These icons appear on the References tab.

Icon	Description
	Performs a process change that moves the item from one status to another status in the workflow.
	Deletes the reference

Add a reference to a risk assessment

Reference sections

Depending on the type of work item, you can add different references to the work item.

Section titles show the number of attached references, such as (2) and an icon for lowest status indicator.

Add a reference

1. On the **References** tab, expand the relevant section.
2. Enter at least 3 characters into the Search bar and click the **Search**  icon.
3. Select an item from the search results.
4. Click **Save changes**.



A screenshot of the AVEVA OSM Web User Guide interface. It shows a table titled 'Supplementary forms (1)' with one item listed. The table has columns for Number, Title, Valid from, Valid to, and Type. The first item has the number CF0004758, title USPP_Form, and type CUSTFORM. The second item has the number CF0004751, title SUPP_FORm, and type CUSTFORM.

Supplementary forms (1)				
Number	Title	Valid from	Valid to	Type
CF0004758	USPP_Form			CUSTFORM
CF0004751	SUPP_FORm			CUSTFORM

Delete a reference

- Click **Delete**  next to the reference. The Delete option availability depends on the current status of the work item.

Status indicator icons

There are seven key phases, shared by all entities, that are identified and will be given the relevant color symbol.

Icon	Phase	Examples of statuses
	New	New
	In planning	For approval
	Approved	Approved, In execution
	Active	Active, Active extended

Icon	Phase	Examples of statuses
	Inactive	<i>On hold, Expired</i>
	Closed/Completed	<i>Completed, Closed</i>
	Canceled	<i>Canceled</i>

Attachments

Manage attachments for risk assessment

The **Attachments** tab contains of list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the **Add**  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.

Add attachment X

Attachment type

File storage ▼

File storage

Internet address

No attachments has been uploaded yet

Upload all Cancel

4. If you are adding a URL, enter the URL, and click **Add web link**.

Add attachment X

Attachment type

Internet address ▼

Enter URL

www.weatherstation.org.nz

Attachments ready to be uploaded

No attachments has been uploaded yet

Upload all Cancel

5. When you have finished adding files or URLs, click **Upload all**.

FILE NAME	DESCRIPTION	ADDED BY	ADDED	Actions
Attachment 1.pdf	Attachment 1	User Name	08/18/22	
Attachment 2.pdf	Attachment 2	User Name	08/18/22	
www.weatherstation.org.nz		User Name	08/22/22	

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

Signatures

View signatures for risk assessment

Signatures tab

The **Signatures** tab contains all the signatures that have been applied to the current item. This is a read-only page.

Note: It is not possible to enter signatures through this page. Signatures are dynamic and are part of Workflow process.

Sometimes, this page may have the option to revoke signatures.

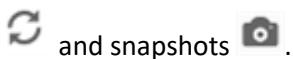
ROLE	PROCESS	SIGNED BY	SIGNED	SIGN ON BEHALF OF
Operator responsible	1.Approve	Thor Arnold	30/01/20 12:49	<button>Revoke</button>

Logs

View logs and snapshots for risk assessment

Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes



- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a snapshot that was taken at the time an item was Approved.
- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the **Logs** tab, click **View All**, **Processes**, or **Snapshots** to change the filter.

FILTER THE LOGS

[View All](#)

 [Processes](#)

 [Snapshots](#)

FORM	REFERENCES (3)	ATTACHMENTS (0)	SIGNATURES	LOGS	
FILTER					
View all		Processes	Snapshots		
DATE	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS	DESCRIPTION
20/05/20 03:09	[REDACTED]	Approve	100 - New	200 - Approved	
20/05/20 03:09	[REDACTED]		-	-	Snapshot of form created after process "Approve" was performed
20/05/20 03:09	[REDACTED]		-	-	Snapshot created after process "Approve" was performed
16/04/20 12:32	[REDACTED]		-	-	Created

Icons

These icons appear on the Logs tab.

Icon	Description
	A process change that moved the item from one status to another in the workflow process.
	Data snapshot - View a snapshot of unformatted data at a specific time.
	Form snapshot - View a snapshot of the form with data at a specific time.

Example of data snapshot

The screenshot displays a risk assessment record and a list of tasks. The risk assessment details include:

- NAME:** Inspection inside Separator
- CREATED BY:** SYSTEM
- CREATED:** 2016-12-15 11:04:42
- LAST CHANGED BY:** General Hod
- LAST CHANGED:** 2016-12-15 13:22:02
- RESPONSIBLE:** VALID TO 2017-02-12 00:00:00
- DISCIPLINE:** Inspection
- SYSTEM:** GENERAL
- AREA:**
- VALID FROM:** 2017-02-01 00:00:00

DESCRIPTION: This risk assessment is required for entering into the tank and do annual inspection of the equipments inside the tank.

COMMENT:

Tasks:

#	TASK	CURRENT CO.	POTENTIAL CONSEQUENCE	RESIDUAL CO.	ALARP
1	Prepare tank before entering	4B	Inadequate insulation. Hydrocarbons leaking into the tank.	1A	
1.1	HAZARDS	4B	Injury to personnel	1A	
1.1.1	MITIGATING MEASURES	4D	Isolate according to isolation plan	1A	
2	Verify that all equipment is isolated	3C	Equipment can start without warning, and hydrocarbons may leak into the tank	2B	
2.1	HAZARDS	3C	Injury to personnel	2B	
2.1.1	MITIGATING MEASURES	3C	All equipment is isolated according to the isolation level	2B	
3	Entry in conjunction with the start of work	5B	Slippery floors inside the tank, so that one slides and tumbles.	2B	
3.1	HAZARDS	5B	Injury to personnel	2B	

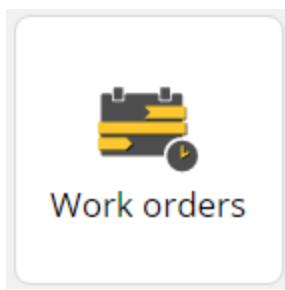
Other Modules

Click to learn more about other modules in Operational Safety Management.

- [Safe Job Analyses](#)
- [Lessons Learned](#)
- [Risk Assessments](#)
- [Shift Handover](#)
- [Collections](#)

Work Orders

This section contains topics that relate to work orders.



Work Order Library

The **Work Order Library** holds all of the work orders for the current location. Work orders are not created inside AVEVA™ Operational Safety Management but can be created from an external EAM system such as SAP PM, IBM Maximo, Avantis PRO, WorkMate.

What is a work order?

A Work Order is a description for a piece of work. All work orders that come into the AVEVA™ Operational Safety Management system are created in another system, such as SAP or IBM Maximo. Work Orders inside Operational Safety Management are read-only, but you can attach other entities.

Library tabs

Work Order library page has the following tabs.

- [Browse All](#) - The **Browse All** tab lists all the work orders for a particular location.
- [My Work](#) - The **My Work** tab shows only those work orders for particular location that are added to current user's My Work.



Browse all work orders

The **Browse All** tab displays all the incoming work orders for this location.

View details of a work order

- Click a work order number or description to see the [details tabs](#) of that work order.

Add a work order to My Work

- Click the **Star** icon  to add the work order to [My Work](#). When an item is selected, the star turns yellow



Screenshot of the AVEVA OSM Web User Guide showing the 'Work orders' page. The top navigation bar includes 'WORK ORDERS' and 'DemoUser'. Below the header, there's a 'Work orders' section with tabs for 'BROWSE ALL (21)' and 'MY WORK (2)'. The main area displays a table of work orders:

STATUS	NUMBER	TITLE	PRI.	DI	DUUE DATE	TC	MAIN OBJECT	Actions
	WO10020	VIDEOINSPECTION O...					E-0002-B	
	WO10019	WELDING OF RAILIN...					C-0002	
	WO10018	INSPECTION OF INTE...					D-0003-A	
	WO10017	REPAIR DEFECTIVE H...					V-0003	
	WO10016	PUMP HOUSE ROOF ...					CONTROL_ROOM	
	WO10015	INVESTIGATE LOW AI...					D-0002	
	WO10014	REPLACE FUEL HOSES					P-0003-B	

Safety warnings

The work order may have a safety warning.

- Safety Warning:** Appears if work order is safety critical.
- Barrier Warning:** Appears if main tag or any of the sub items linked to work order have barriers.

Tag criticality

Indicates the criticality level of the main item. See [Tag criticality](#).

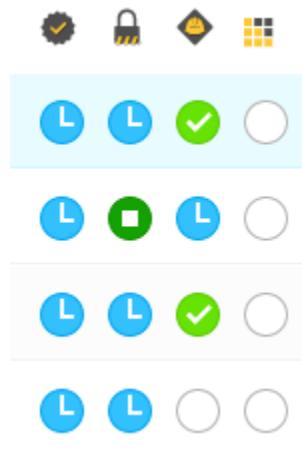
Linked entities

The icons in the right-most columns represents the linked entities to a work order.

Icon	Description
	Linked work permits
	Linked isolation plans
	Linked safe job analysis
	Linked risk assessments
	Linked supplementary forms

Status Indicators

The displayed status icon represents the lowest status among the linked entities. For more information, see [Status Indicator icons](#).



View work order operations

Work Order operations

Work order can be extended to include Operations as sub-work orders.

An Operation behaves in the same way as a work order and is imported into the system through the Web API.

Operations are linked to work orders and are listed in the Work Order library list as shown below.

BROWSE ALL MY WORK (0)

Browse all | Asset A

STATUS	NUMBER	TITLE	PRI.	DI	DUE DATE	TC	MAIN OBJECT	Actions
Work in pr...	CWO-00000001	Excess vibration on portable water pump	C	S	01/05/2019	*	WPMP001	○ ○ ○ ○
Work done	CWO-00000001/OP-0010	Open inspection door	C	S	01/05/2019	*	WPMP001-A	○ ○ ○ ○
Work done	CWO-00000001/OP-0020	Check torque on impeller nut	C	S	01/05/2019	*	WPMP001-B	○ ○ ○ ○
Waiting for...	CWO-00000001/OP-0030	Test forklift	C	S	01/05/2019	*	WPMP001-C	○ ○ ○ ○
Waiting for...	CWO-00000001/OP-0040	Remachine threads if needed	C	S	01/05/2019	*	WPMP001-D	○ ○ ○ ○

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Exclude Operations

You can filter out the Operations by selecting **Exclude Operations** in the Search panel.

Operations tab

A work order with operations has an Operations tab that lists all the linked operations.

CWO-00000001 Excess vibration on portable water pump

STATUS: 400 - Work in progress TC: WPMP001 DISCIPLINE: Asset A SCHEDULED START: 15/04/19 - 00:00 DUE DATE: 01/05/19 - 00:00 PRIORITY: C Safety critical

More details about the work order can be found in the EAM system

STATUS	NUMBER	TITLE	PRI.	DI	DUE DATE	TC	MAIN OBJECT	Actions
Waiting for...	CWO-00000001/OP-0040	Remachine threads if needed	C	S	01/05/2019	*	WPMP001-D	○ ○ ○ ○
Waiting for...	CWO-00000001/OP-0030	Test forklift	C	S	01/05/2019	*	WPMP001-C	○ ○ ○ ○
Work done	CWO-00000001/OP-0020	Check torque on impeller nut	C	S	01/05/2019	*	WPMP001-B	○ ○ ○ ○
Work done	CWO-00000001/OP-0010	Open inspection door	C	S	01/05/2019	*	WPMP001-A	○ ○ ○ ○

PAGE 1 OF 1

When you click one of these Operations, they display as a normal work order with the same capabilities.

Process work permit from work order

Find a work order, add a work permit to it, and submit the work permit for approval.

Find a work order

- Click the **Work Order** tile on the home page, then browse through the list, or search for a work order.
- or
- Double-click the work order to open it and see the details.

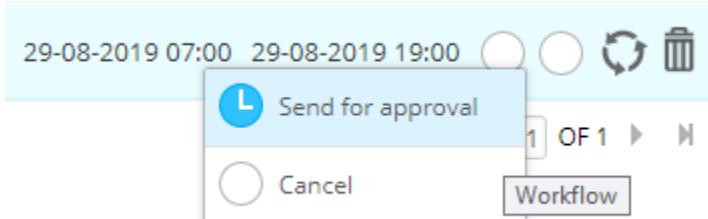
Write a work permit for the work order

- Click **Add** to start a new work permit for the work order.
- Enter the required details and click **Create new work permit**. The new work permit appears in the status of **New**.

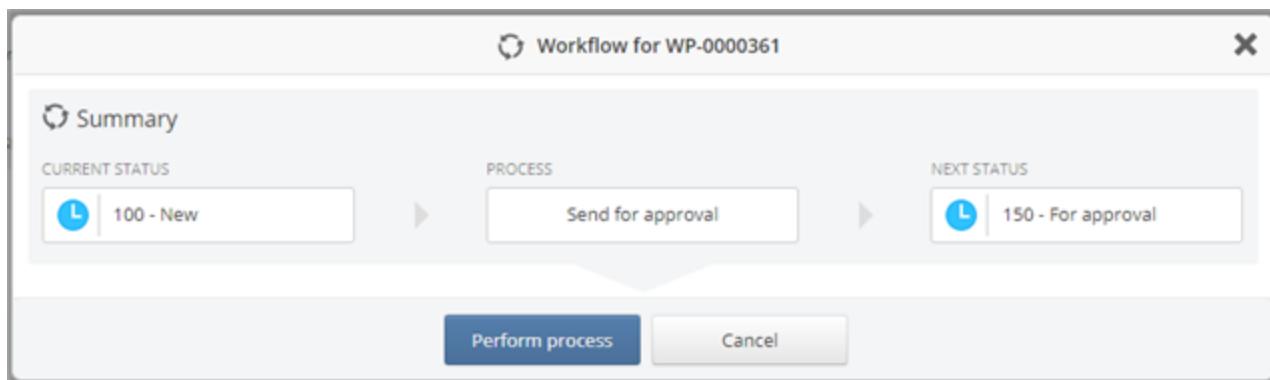
New

Submit work permit for Approval

- Click the **Process** icon and select *Send For Approval*.



- On the Workflow dialog box, click **Perform process**.



The work permit is now in *For Approval* status.



Jumping between OSM and EAM

There are some features, if configured, that make it possible to jump between work orders in the EAM system and work orders in OSM.

Jump from OSM directly to EAM system

If configured, there is a hyperlinked image on the details tabs of a work order in the OSM web application. Click the image to jump directly to the work order in the EAM system.

The screenshot shows the OSM Work Orders page with a work order card for "WO-120029 Maintenance on turbine N-32". The card includes fields for Status (400 - Work in progress), Main Object (Wind Farm 1), Discipline (Mechanical), Scheduled Start, Due Date, and Priority. Below the card are links for Work Permits (0), Safe Job Analyses (0), Isolations (0), Risk Assessments (0), and Supplementary Forms (0). A yellow callout bubble says "More details about the work order can be found in the EAM system." At the bottom is a search bar and a magnifying glass icon.

Jumping from EAM system into OSM

It's possible to configure links in the external EAM system that will enable a user to jump directly to the work order in the OSM web application.

These types of links can also appear in emails that are sent to OSM users. Therefore, a link in an email that has been sent from OSM will open the work item referred in the email.

When clicked, and if there is a current OSM session open, a link to OSM will open the browser window directly on the relevant work item. If there is no current session available, the user will need to sign into OSM first before accessing the work item.

Jumping from EAM to OSM will set preferred site

Clicking a link from an external EAM system or external email link to jump to a work item in OSM web application will set the preferred site in OSM web application. The site for the work item in link will be used to set the preferred site.

Details for work order

Details tabs for work orders

When you click on a work order in the [Work Order Library](#), you can access the details for that specific work order.

Open the work order

- Double-click a work order in the Library.

Work order tabs

Each work order has several tabs containing the details about the work order.

WORK PERMITS (2)	SAFE JOB ANALYSES (1)	ISOLATIONS (1)	RISK ASSESSMENTS (0)	SUPPLEMENTARY FORMS (2)
<ul style="list-style-type: none">• Work Permits		Search for, and add work permits to the work order.		
<ul style="list-style-type: none">• Safe Job Analysis		Search for, and add SJAs to the work order.		
<ul style="list-style-type: none">• Isolations		Search for, and add isolation plans to the work order.		
<ul style="list-style-type: none">• Risk Assessments		Search for, and add risk assessments to the work order.		
<ul style="list-style-type: none">• Supplementary Forms		Search for, and add supplementary forms to the work order.		

Add work permits to work order

Work Permits tab

On the **Work Permits** tab, you can search for and add work permits to current work order. You can also remove a

work order.

Information header

The [Information header](#) across the top of the screen provides details about the form and action buttons.

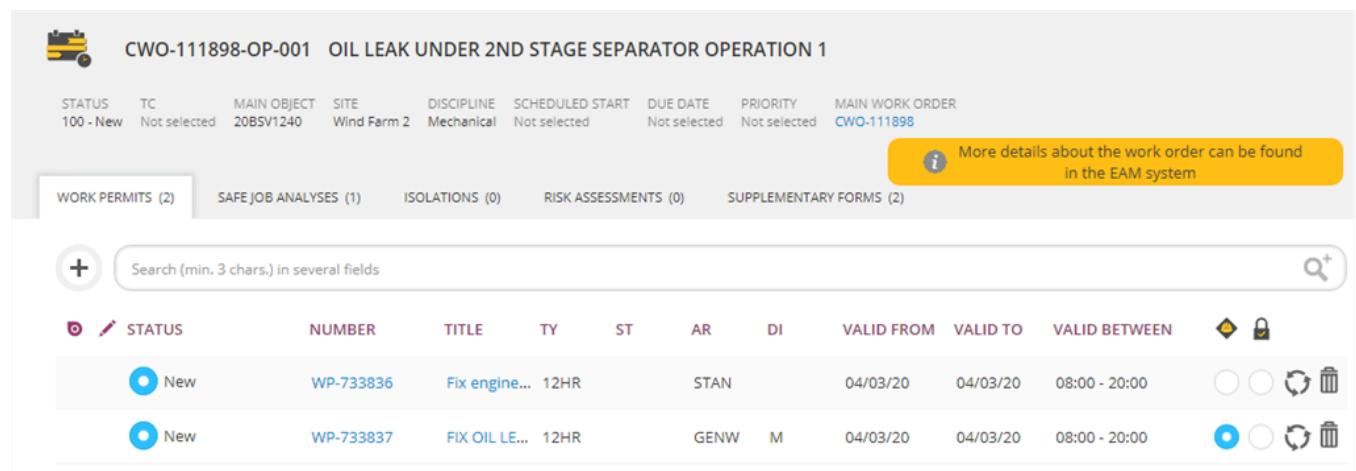
Add a new work permit

- Click the **Add**  button to add a new work permit.

Remove a work permit

- Select a work permit and click the **Delete** icon.

These functionalities are available until the work permit is approved.



STATUS	TC	MAIN OBJECT	SITE	DISCIPLINE	SCHEDULED START	DUE DATE	PRIORITY	MAIN WORK ORDER
100 - New	Not selected	20BSV1240	Wind Farm 2	Mechanical	Not selected	Not selected	Not selected	CWO-111898

WORK PERMITS (2) **SAFE JOB ANALYSES (1)** **ISOLATIONS (0)** **RISK ASSESSMENTS (0)** **SUPPLEMENTARY FORMS (2)**

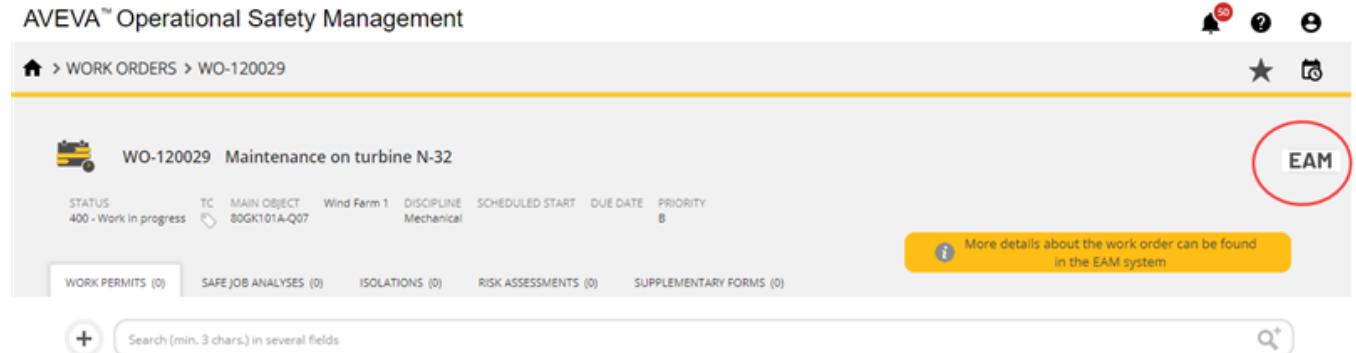
More details about the work order can be found in the EAM system

STATUS	NUMBER	TITLE	TY	ST	AR	DI	VALID FROM	VALID TO	VALID BETWEEN		
New	WP-733836	Fix engine...	12HR		STAN		04/03/20	04/03/20	08:00 - 20:00		
New	WP-733837	FIX OIL LE...	12HR		GENW	M	04/03/20	04/03/20	08:00 - 20:00		

Jump directly to EAM system

If configured, there is a hyperlinked image to the EAM system. Click the image to jump directly to the work order in the EAM system.

See also [Jumping between OSM and EAM](#).



STATUS	TC	MAIN OBJECT	Wind Farm 1	DISCIPLINE	SCHEDULED START	DUE DATE	PRIORITY
400 - Work in progress	Not selected	80GK101A-Q07		Mechanical			B

WORK PERMITS (0) **SAFE JOB ANALYSES (0)** **ISOLATIONS (0)** **RISK ASSESSMENTS (0)** **SUPPLEMENTARY FORMS (0)**

EAM

More details about the work order can be found in the EAM system

View safe job analyses associated with work order

This topic relates to [Details for work order](#).

Safe Job Analyses tab

On the **Safe Job Analyses** tab, you can view the list of SJAs that are connected to the current Work Order.

Note: You cannot create or add SJAs on this page. SJAs will appear if they are connected to the work permit.

The screenshot shows a table with the following columns: STATUS, NUMBER, TITLE, AR, SY, DI, TC, and TAG NAME. There is one row visible with the following data: STATUS is 'New', NUMBER is 'SJA-033468', TITLE is 'SJA Fix engine'. A yellow callout box in the top right corner says: 'More details about the work order can be found in the EAM system'.

STATUS	NUMBER	TITLE	AR	SY	DI	TC	TAG NAME
New	SJA-033468	SJA Fix engine					

Add isolation plans to work order

This topic relates to [Details for work order](#).

Isolations tab

On the **Isolations** tab, you can search for and add isolation plans to the current work order.

You can also delete an existing isolation plan.

Add new isolation plan

- Click the **Add** button to add a new isolation plan.

Delete an isolation plan

- Select an isolation plan and click the **Delete** icon.

These functionalities are available until the work order is approved.

The screenshot shows a table with the following columns: STATUS, NUMBER, TITLE, SY, DI, START AT, and END AT. There is one row visible with the following data: STATUS is 'For approval', NUMBER is 'ISO-003699', TITLE is 'Isolation for engine work', SY is 'ELEC', START AT is '09/03/20', END AT is '10/03/20'. A yellow callout box in the top right corner says: 'More details about the work order can be found in the EAM system'.

STATUS	NUMBER	TITLE	SY	DI	START AT	END AT
For approval	ISO-003699	Isolation for engine work	ELEC		09/03/20	10/03/20

Add risk assessments to work order

Risk Assessments tab

On the **Risk Assessments** tab, you can search for and add Risk Assessments to current work order. You can also delete an existing Risk Assessment.

These functionalities are available until the work order is approved.

The screenshot shows a table with columns: Number, Title, Approved, and Responsible. The first row contains TRA-0000021 and Risk assessment. The second row contains TRA-0000041 and Risk Assessment for pump change. A search bar at the top right is highlighted with a yellow border.

Number	Title	Approved	Responsible
TRA-0000021	Risk assessment		
TRA-0000041	Risk Assessment for pump change		

Add new Risk Assessment to work order

- Click the Add button to add a new Risk Assessment.

Remove a Risk Assessment from work order

- Select an Risk Assessment and click the Delete icon.

The screenshot shows a table with columns: STATUS, NUMBER, TITLE, RESPONSIBLE, UPDATED, UPDATED BY, APPROVED, and COMMENT. The first row contains New, TRA-0000041, Risk Assessment for pump change, DemoUser, 26/08/19 - 07:22, and Approved. A search bar at the top right is highlighted with a yellow border.

STATUS	NUMBER	TITLE	RESPONSIBLE	UPDATED	UPDATED BY	APPROVED	COMMENT
New	TRA-0000041	Risk Assessment for pump change	DemoUser	26/08/19 - 07:22		Approved	

Add supplementary forms

This topic relates to [Details for work order](#).

Supplementary Forms tab

On the **Supplementary Forms** tab, you can search for and add supplementary forms to current work order.

You can also delete an existing supplementary.

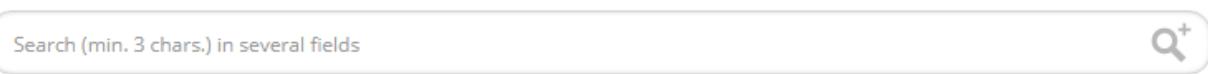
Note: These functionalities are available until the work order is approved.

Add new supplementary form to work order

- Click the **Add**  button to add a new supplementary form. See [Create new supplementary form](#).

Remove a supplementary form from work order

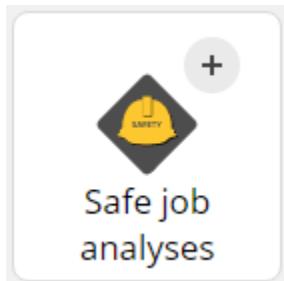
- Select a supplementary form and click the **Delete** icon.



NUMBER	STATUS	TITLE	TYPE	SUB TYPE	
T10000041	 New	Confined Space Form	Type 1		 
T10000061	 New	Confined Space Form - Copy	Type 1		 

Safe Job Analyses

This section contains topics that relate to Safe Job Analyses.



Safe Job Analyses Library

This topic relates to [Safe Job Analyses](#).

Safe Job Analyses Library

The Safe Job Analyses Library holds all of the Safe Job Analyses for the current location.

What is a safe job analysis?

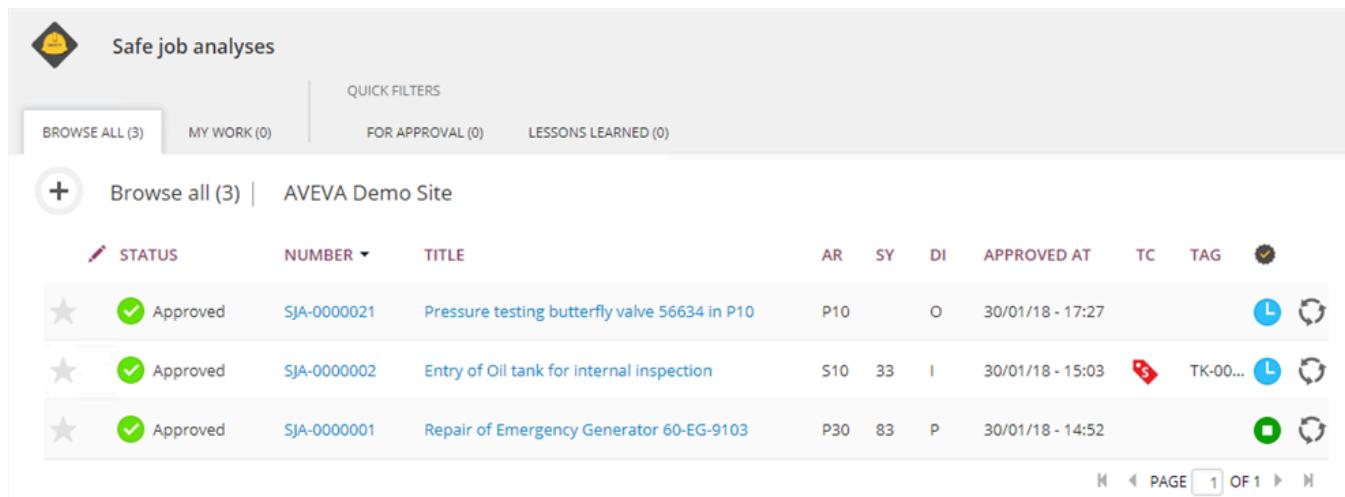
A Safe Job Analysis (SJA) is a procedure that integrates accepted safety practices into a particular task or job

operation.

Library tabs

The Safe Job Analyses library page has the following tabs.

- **Browse All** - The **Browse All** tab lists out all the SJAs for particular location.
- **My Work** - The **My Work** tab shows only those SJAs for a particular location that are added to current user's **My Work**.
- **Quick filters** – These are pre-configured quick filters that show only items that are in a particular status.



The screenshot shows the 'Safe job analyses' library page. At the top, there are tabs: 'BROWSE ALL (3)', 'MY WORK (0)', 'FOR APPROVAL (0)', and 'LESSONS LEARNED (0)'. Below the tabs, a heading says '+ Browse all (3) | AVEVA Demo Site'. There is a table with columns: STATUS, NUMBER, TITLE, AR, SY, DI, APPROVED AT, TC, TAG, and actions. The first row has a star icon, a green checkmark, 'Approved', 'SJA-0000021', 'Pressure testing butterfly valve 56634 in P10', 'P10', 'O', '30/01/18 - 17:27', a blue circular icon with 'L', and a refresh icon. The second row has a star icon, a green checkmark, 'Approved', 'SJA-0000002', 'Entry of Oil tank for internal inspection', 'S10', '33', 'I', '30/01/18 - 15:03', a red circular icon with a dollar sign, 'TK-00...', a blue circular icon with 'L', and a refresh icon. The third row has a star icon, a green checkmark, 'Approved', 'SJA-0000001', 'Repair of Emergency Generator 60-EG-9103', 'P30', '83', 'P', '30/01/18 - 14:52', a blue square icon with a white square, and a refresh icon. At the bottom right, there is a 'PAGE 1 OF 1' indicator.

STATUS	NUMBER	TITLE	AR	SY	DI	APPROVED AT	TC	TAG	Actions
★ Approved	SJA-0000021	Pressure testing butterfly valve 56634 in P10	P10	O	30/01/18 - 17:27				
★ Approved	SJA-0000002	Entry of Oil tank for internal inspection	S10	33	I	30/01/18 - 15:03		TK-00... 	
★ Approved	SJA-0000001	Repair of Emergency Generator 60-EG-9103	P30	83	P	30/01/18 - 14:52			

Browse all safe job analyses

The **Browse All** tab displays all the Safe Job Analyses in the library for this location.

View details of a safe job analysis

- Click any row to view the [details](#) page of that safe job analysis.

Create a new safe job analysis

- Click the button to create new entity.

Add a safe job analysis to My Work

- Click the **Star** icon to add the SJA to [My Work](#). When an item is selected, the star turns yellow .

BROWSE ALL (317)	MY WORK (0)	NEW (236)	FOR APPROVAL (9)	APPROVED (72)
+ Browse all (317) Site 1				
STATUS	NUMBER ▾	TITLE	AR	SY
Approved	SJA-033428	Test_SJA_09092019	C	10
For approval	SJA-033424	Test_SJA-098720	A00	13
New	SJA-033423	Test_SJA-98232	A00	13
For approval	SJA-033422	Test_SJA-956448	A00	13
New	SJA-033421	Test_SJA-900288	A00	13
				E
				09/09/19 - 18:26

Library icons

These icons appear on the Library page.

Icon	Name	Description
	Add	Click Add icon to add a work permit.
	My Work	Click the star icon to add the item to My Work .
	Signature	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status	Indicates the current status of the item.
	Process Workflow	Click the Workflow icon to show the available processes for the current item and select the next status.

Tag Criticality

Indicates the criticality level of the main item. See [Tag criticality](#).

Work with safe job analyses

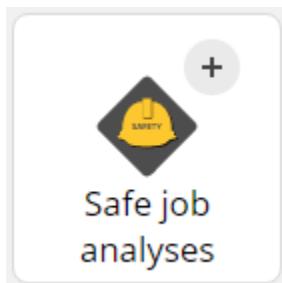
Working with safe job analyses.

- [Create new safe job analysis](#)

- Duplicate a safe job analysis
- Answer Checklist Questions
- Add or Edit Questions
- Edit a Meeting
- Edit Participants of a Meeting

Create new safe job analysis

You can create a new safe job analysis from the [OSM Home page](#) or from the library page.



Create from Library page

1. On the Safe Job Analyses Library page, click the **Add**  button. The New Safe Job Analyses dialog box appears.
2. Enter the necessary details. The fields with a blue star indicated required information.
For more information, see [Fill out Safe Job Analysis fields](#).
3. Click **Create Safe Job Analyses**.

The screenshot shows the 'Create new safe job analysis' form. It includes the following fields:

- Title ***: Type a title for this safe job analysis.
- Number**: [To be generated]
- Description**: A large text area for describing the safe job analysis.
- Site ***: WFM1 - Wind Farm 1
- Checklist template ***: The default template in English
- Area**: Select/search in code and name
- Tag**: Select tag / search in name and description
- System**: Select/search in code and name
- Discipline**: Select/search in code and name
- Responsible for SJA ***: Select user / search in user name

* Required fields

Buttons at the bottom: Create another, **Create new SJA**, Cancel

Fill out Safe Job Analysis fields

These are the fields for a Safe Job Analysis item. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	The title of the supplementary form. This field is required.
• <i>Number</i>	The number will be auto-generated.
• <i>Description</i>	A description of the safe job analysis.
• <i>Site*</i>	The site where the safe job analysis will be used. This field is required.
• <i>Area</i>	You can select an Area of the Site.

Field	Description
• <i>System</i>	You can specify the type of system.
• <i>Responsible for SJA*</i>	The name of the person who will be responsible for the safe job analysis. Select from the drop-down list. This field is required.
• <i>Checklist template*</i>	Select the checklist template to use for this safe job analysis. This field is required.
• <i>Tag</i>	The tag number for equipment.
• <i>Discipline</i>	You can specify which discipline is performing this analysis.

 Create new safe job analysis

<p>Title *</p> <input type="text" value="Type a title for this safe job analysis"/>	<p>Number</p> <div style="border: 1px solid #ccc; padding: 2px;">[To be generated]</div>
<p>Description</p> <div style="border: 1px solid #ccc; height: 150px; margin-top: 5px;"></div>	
<p>Site *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">WFM1 - Wind Farm 1</div>	<p>Checklist template *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">The default template in English</div>
<p>Area</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Select/search in code and name</div>	<p>Tag</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Select tag / search in name and description</div>
<p>System</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Select/search in code and name</div>	<p>Discipline</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Select/search in code and name</div>
<p>Responsible for SJA *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Select user / search in user name</div>	

* Required fields

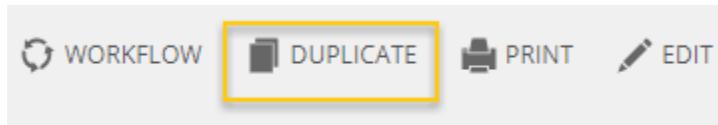
Create another **Create new SJA** Cancel

Duplicate a safe job analysis

It is not possible to duplicate a safe job analysis where the checklist template is inactive.

Duplicate a safe job analysis

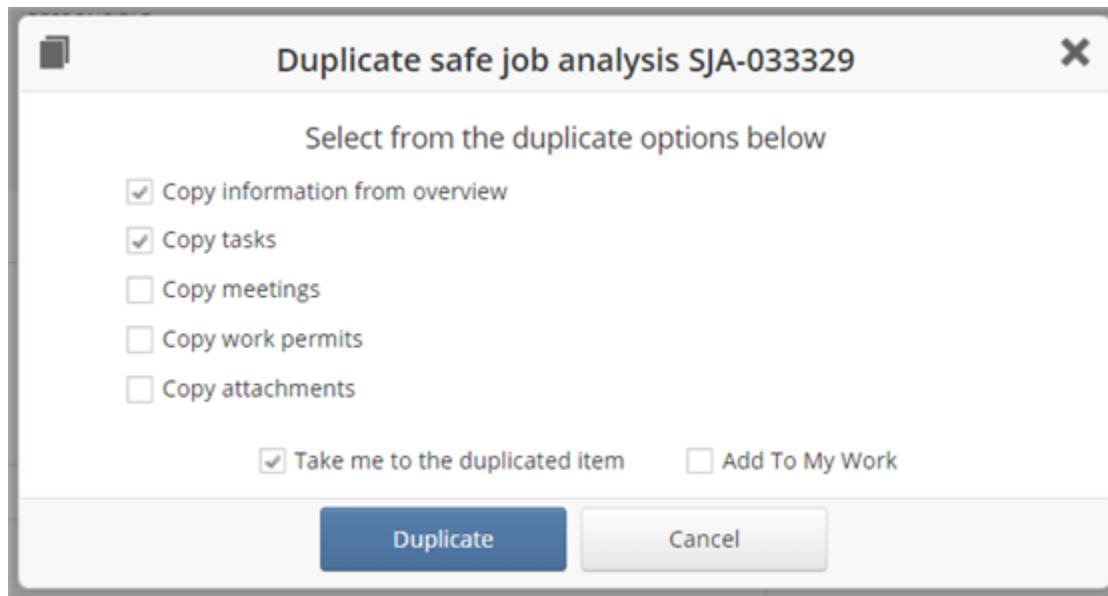
- Click the **Duplicate** button to duplicate an entire safe job analysis.



Options

When duplicating a safe job analysis, the following options are possible.

- Copy information from overview
- Copy tasks
- Copy meetings
- Copy work permits
- Copy attachments



Answer Checklist Questions

Mandatory comments

If mandatory comments are enabled, then a No answer requires explanation in the **Comments** field.

To answer questions

- For each question, select **Yes**, **No**, or **N/A** (not Applicable). A No answer may require you to enter a comment.

				Yes	No	N/A	Comments
A - Documentation and experience							
1 - Is this a familiar work operation for the crew?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
2 - Is there an adequate procedure/instruction/workpackage?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
3 - Is the group aware of experiences/incidents from similar activities/SJA?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
B - Competence				Yes	No	N/A	Comments
1 - Do we have the necessary personnel and skills for the job?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
2 - Are there other parties that should participate in the SJA meeting?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
C - Communication and coordination				Yes	No	N/A	Comments
1 - Is this a job where several units/crews must be coordinated?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
2 - Is good communications and suitable means of communication in place?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
3 - Has it been made clear who is in charge for the work?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
4 - Are there potential conflicts with simultaneous activities (system/area/installation)?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
5 - Has sufficient time been allowed for the planning of the activities?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
6 - Has the team considered handling of alarm/emergency situations and informed emergency functions about possible measures/actions?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
D - Key physical safety system				Yes	No	N/A	Comments
1 - Are barriers, to reduce the likelihood of unwanted release/leakage maintained intact (safety valve, pipe, vessel, control system etc.)?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				

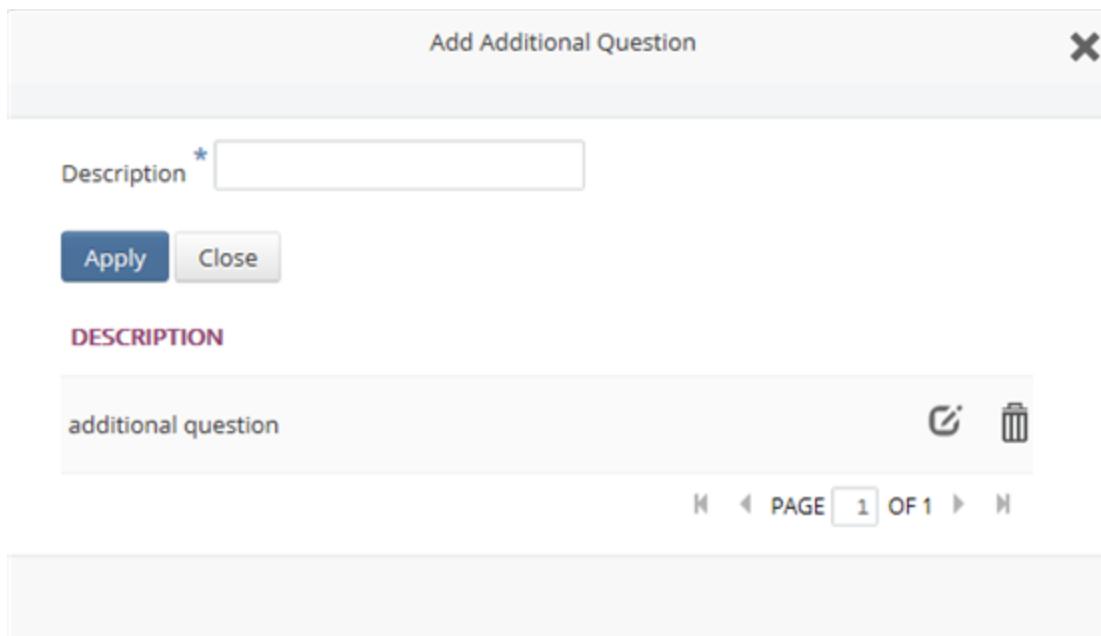
Add or Edit Questions

Additional questions

In addition to the questions provided by a checklist template, you can add additional questions. You will not be able to add any questions after the SJA is processed to *Approve* status.

Add a question

- Click the **Add** button to add a new task. You can edit or delete the questions in same dialog box.



Icons

These icons appear on the Question dialog box.

Icon	Description
	Click Add icon to add a new task.
	Click Edit icon to edit an existing task.
	Click Delete icon to delete an existing task.
	Click Duplicate icon to duplicate an existing task.

Edit a Meeting

The ability to edit a meeting depends on the status of the safe job analysis (SJA).

- If the SJA is in an editable status, a SJA meeting can be added, updated, or deleted .
- If the SJA itself is in a read-only status, you cannot add, edit, or delete a SJA meeting unless the status is the out-of-box *Approved* status.

Edit a meeting

1. On the [Meetings](#) tab, click the **Edit** icon to edit a meeting. The Edit Meeting dialog box appears.
2. Edit the details:

- Date
 - Place
 - Chaired by
3. Click **Apply changes**.

The screenshot shows a modal dialog titled "Edit meeting". It contains fields for "Date *" (22/12/16), "Place *" (Asset A - Main room, highlighted with a yellow border), and "Chaired by *" (an empty dropdown menu). At the bottom are "Apply changes" and "Cancel" buttons.

Edit Participants of a Meeting

You can add and edit participants only while the SJA is not approved. Once it is *Approved*, you can only view participants by clicking  icon.

Edit meeting participants

1. On the [Meetings](#) tab, click the  **Participants** icon to edit the participants. The Add/Remove Participants dialog box appears.
2. Add or edit the details:
 - Name
 - Email
 - Department / Position
3. Click **Add participant** or **Apply changes**.

Add/Remove participants X

Add new participant

Name *

E-mail

Department / Position

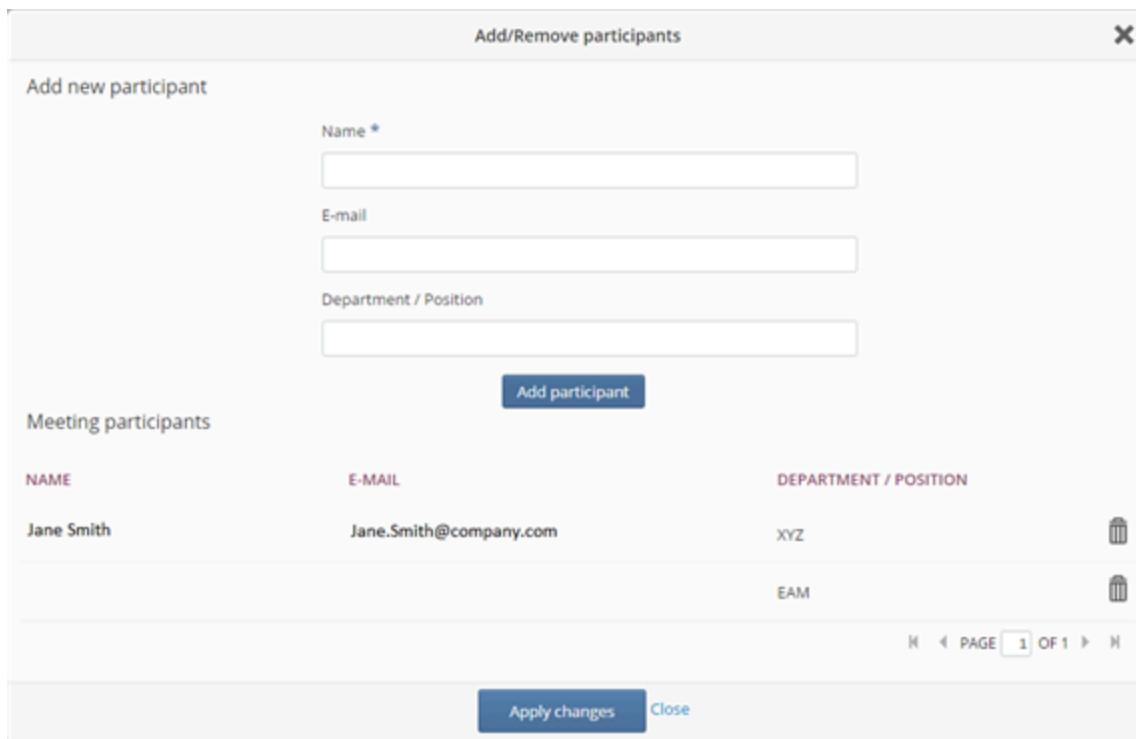
Add participant

Meeting participants

NAME	E-MAIL	DEPARTMENT / POSITION
Jane Smith	Jane.Smith@company.com	XYZ
		EAM

1 OF 1

Apply changes **Close**



Details for safe job analysis

When you click on a safe job analysis in the [Safe Job Analyses Library](#), you can access the details for that specific safe job analysis.

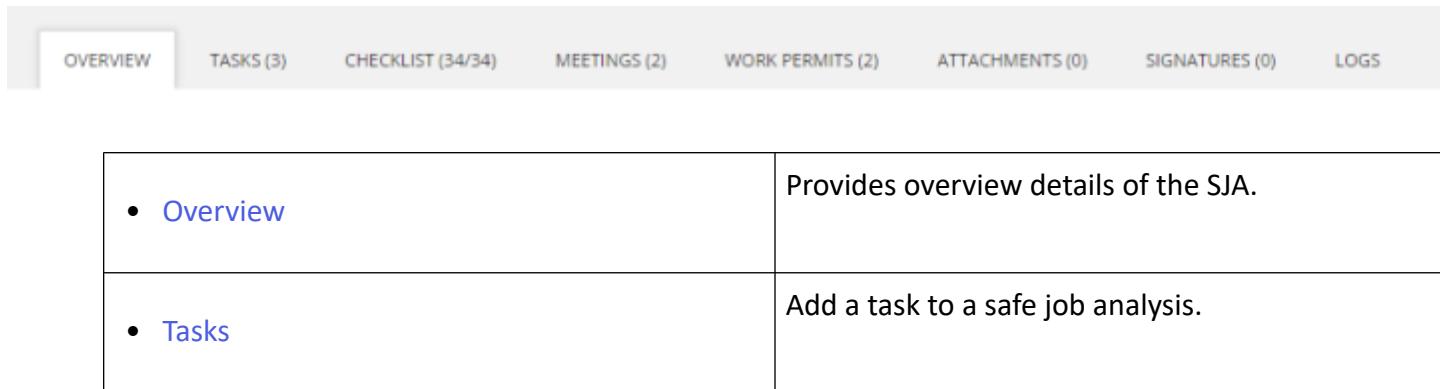
Open a safe job analysis

- Double-click a safe job analysis in the Library.

Safe Job Analysis tabs

Each safe job analysis has several tabs containing the details about the safe job analysis.

OVERVIEW	TASKS (3)	CHECKLIST (34/34)	MEETINGS (2)	WORK PERMITS (2)	ATTACHMENTS (0)	SIGNATURES (0)	LOGS
<ul style="list-style-type: none">• Overview	Provides overview details of the SJA.						
<ul style="list-style-type: none">• Tasks	Add a task to a safe job analysis.						



• Checklist	Complete the Checklist questions.
• Meetings	View meetings for the safe job analysis.
• Work Permits	Add work permits to an isolation list.
• Attachments	Add attachments to the safe job analysis.
• Signatures	View signatures for the safe job analysis.
• Logs	View log for the safe job analysis.

Safe Job Analysis Overview

The **Overview** tab contains the high-level descriptions of the analysis procedure.

Information header

The [Information header](#) across the top of the screen provides details about the form and action buttons.

SJA form

The SJA form contains the summary details of the Safe Job Analysis form.

Note: These fields have configurable help text to assist with what type of information to enter.

For more information, see *AVEVA™ Operational Safety Management Administrator Help*.

OVERVIEW

Requirements / Preconditions	All documentation for lifeboats needs to be available. Including emergency escape plans.	 Is the total risk acceptable? <input type="radio"/> Yes <input checked="" type="radio"/> No
Comments	This needs to be evaluated before end of week 51	
Summary	Evaluation completed with an agreement of a new plan to be implemented.	

Section	Description
Requirements/Preconditions	This section contains requirements or preconditions for the current SJA. This field will be disabled in <i>Completed</i> and <i>Canceled</i> status.
Comments	This section contains comments for the current SJA. This field will be disabled in <i>Completed</i> and <i>Canceled</i> status.
Summary	This section contains a summary for the current SJA. This field will be disabled in <i>Completed</i> and <i>Canceled</i> status.
Was the Main Meeting Held	This radio button will be enabled only if Main Meeting has been added in the Meetings tab. It is mandatory to set this to Yes in order to approve SJA.
Is the Total Risk Acceptable	This radio button will be enabled only if all the checklist questions are answered in checklist tab. It is mandatory to set this to Yes in order to approve SJA.

View Tasks for SJA

The **Tasks** tab contains the individual tasks for the current SJA.

TASKS (3)					
Tasks					
#	DESCRIPTION	HAZARD / CAUSE	POTENTIAL CONSEQUENCE	MEASURES	RESPONSIBLE FOR MEASURES
# 1	Prepare vessel before entry	Lack of safety equipment	Injury of personnel	Inspection inside vessel	Safety inspector
# 2	Emergency documentation	Lack of emergency documentation	Personel injury	Inspection in all rooms where this is mandatory	Safety inspector
# 3	Emergency entries	Missing emergency entries with signs and lightning	Personal injury	Inspection of all emergency entries	Safety inspector

Add a new task

- Click the Add  button to add a new task.

Icons

These icons appear on the Tasks tab.

Icon	Description
	Click Add icon to add a new task.
	Click Duplicate icon to duplicate an existing task.
	Click Edit icon to edit an existing task.
	Click Delete icon to delete an existing task.

View Checklist for SJA

The **Checklist** tab contains template checklist questions. The user must answer all checklist questions in order to process the SJA.

A checklist template can be configured on the Settings page. For more information, see [Settings](#).

CHECKLIST (34/34)

Checklist

Using template - DEFAULT

	Yes	No	N/A	Comments
A - Documentation and experience				
1 - Is this a familiar work operation for the crew?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2 - Is there an adequate procedure/instruction/workpackage?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3 - Is the group aware of experiences/incidents from similar activities/SJA?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
B - Competence				
1 - Do we have the necessary personnel and skills for the job?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2 - Are there other parties that should participate in the SJA meeting?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
C - Communication and coordination				
1 - Is this a job where several units/crews must be coordinated?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2 - Is good communications and suitable means of communication in place?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
3 - Has it been made clear who is in charge for the work?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
4 - Are there potential conflicts with simultaneous activities (system/area/installation)?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
5 - Has sufficient time been allowed for the planning of the activities?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
6 - Has the team considered handling of alarm/emergency situations and informed emergency functions about possible measures/actions?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
D - Key physical safety system				
1 - Are barriers, to reduce the likelihood of unwanted release/leakage maintained intact (safety valve, pipe, vessel, control system etc.)?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Icons

These icons appear on the Checklist tab.

Icon	Description
	Click Add icon to add a new task.
	Click Edit icon to edit an existing task.
	Click Delete icon to delete an existing task.
	Click Duplicate icon to duplicate an existing task.

View Meetings for SJA

On the **Meetings** tab, you can view and manage the list of meetings.

- [Edit a Meeting](#)
- [Edit Participants of a Meeting](#)

MEETINGS (2)

+ Meetings

DATE PLACE CHAIRED BY PARTICIPANTS

22/12/16 09:17	Asset A - Main room	<input checked="" type="checkbox"/> Has the main meeting been held?		
22/12/16 09:17	Asset A - Control room	<input type="checkbox"/>		

PAGE 1 OF 1

Icons

These icons appear on the Meetings tab.

Icon	Description
	Click Add icon to add a new meeting.
	The meeting with icon is main meeting. By default, the first meeting added is the main meeting. If you delete the main meeting, then you will get an option to add the next meeting as the main meeting. You can only delete the main meeting if the Has the main meeting been held checkbox is not selected.
	Click the Participants icon to view and manage participants .
	Click the Edit icon to edit an existing meeting .
	Click the Delete icon to delete an existing meeting .
	Click the Duplicate icon to duplicate an existing meeting .

View work permits for SJA

The **Work Permits** tab contains the list of work permits attached to SJA.

Search box

You can use the Search bar to search for available work permits for the current location from the search bar and add them to the list.

You will need to type a minimum number of characters in order to search. This is configurable on the [General settings](#) page.

Propagate values

- Click  to propagate Area, System, and Tag values from the work permit to the current SJA. The information in red font indicates that this information has been propagated. You can see the changed information in header after propagation is complete, and the font becomes black.



WORK PERMITS (2)													
Search for no. or work description (min chars: 3)													
STATUS	NUMBER	WORK DESCRIPTION	TY	ST	AR	DI	SYSTEM	VALID FROM	VALID TO	WORK ORDER	TC	MAIN TAG	
New	WOP-732502	Lifeboats	L1STD		HP,90			26-02-2016 07:00	26-02-2016 19:00			   	
New	WOP-732954	Maintenance work in lower c...	L1STD	06WS	HP,UN D		GAS COMPRESSION	22-12-2016 07:00	22-12-2016 19:00			   	

Icons

These icons appear on the Work Permits tab.

Icon	Description
	Click Delete to remove the work permit attachment from the SJA. The work permit will still exist in the system.
	Click to propagate data from certain fields in work permit to the SJA.

Manage Attachments for SJA

The **Attachments** tab contains of list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

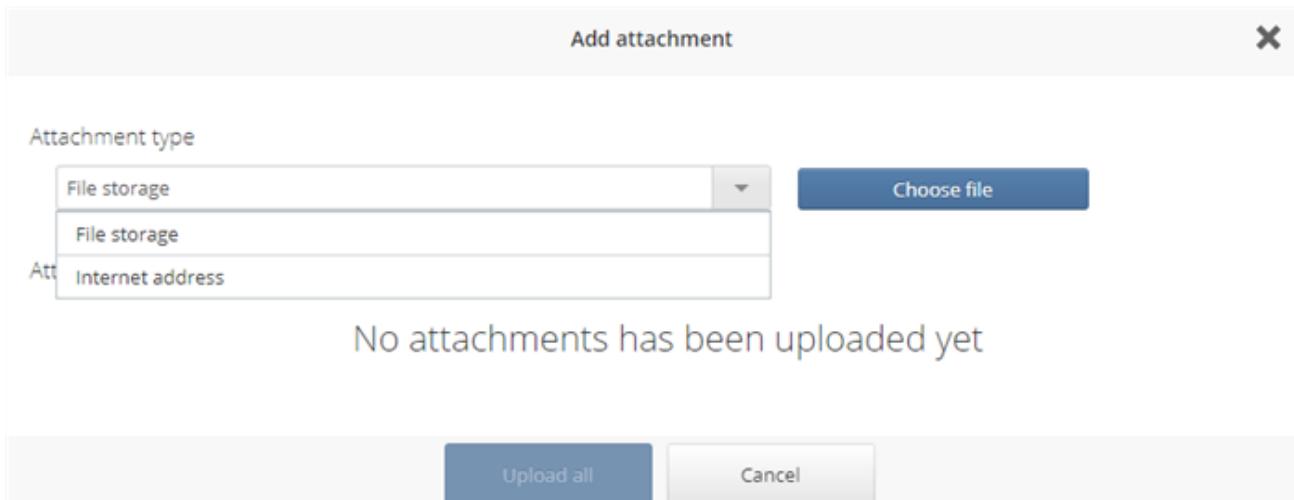
Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.

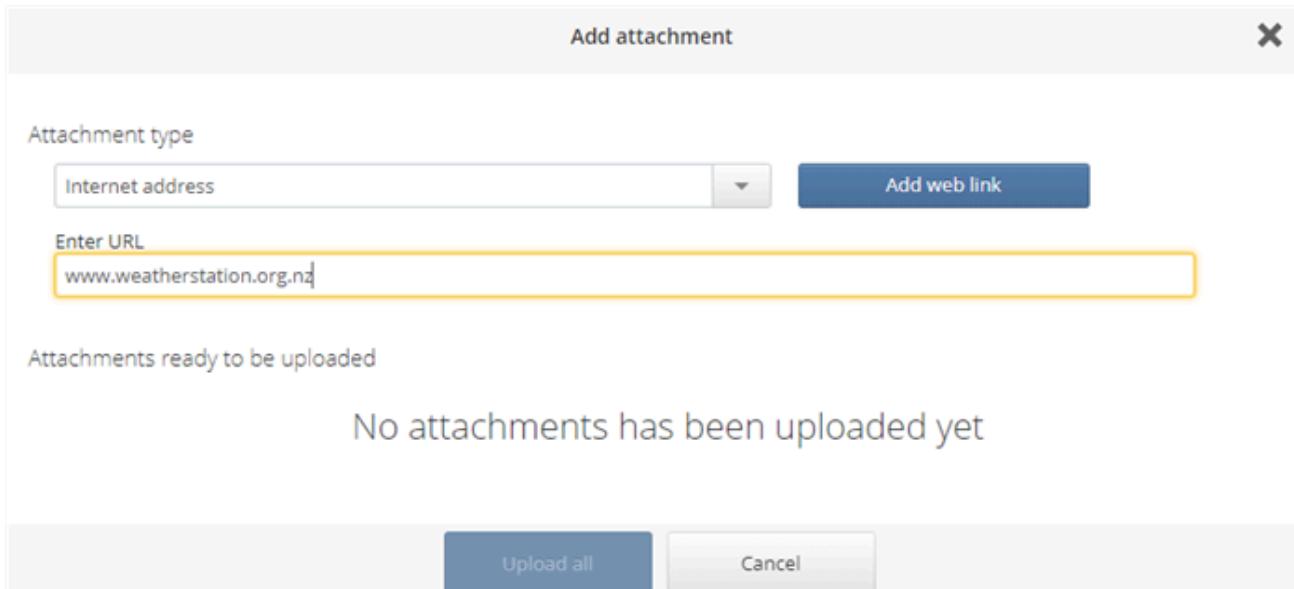
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the **Add**  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



4. If you are adding a URL, enter the URL, and click **Add web link**.



5. When you have finished adding files or URLs, click **Upload all**.

FORM	PLOT LOCATION	REFERENCES (2)	ATTACHMENTS (3)	SIGNATURES	LOGS
FILE NAME	DESCRIPTION	ADDED BY	ADDED		
Attachment 1.pdf	Attachment 1	George Brown	08/18/22		
Attachment 2.pdf	Attachment 2	George Brown	08/18/22		
www.weatherstation.org.nz		George Brown	08/22/22		

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.
	<p>If this red icon displays, hover over the tooltip to see the message. Click red icon to remove.</p> <ul style="list-style-type: none">• File size is exceeded• File type is not supported
	Click the Delete icon to delete an existing attachment.

View Signatures for SJA

Signatures tab

The **Signatures** tab contains all the signatures that have been applied to the current item. This is a read-only page.

Note: It is not possible to enter signatures through this page. Signatures are dynamic and are part of Workflow process.

Sometimes, this page may have the option to revoke signatures.

ROLE	PROCESS	SIGNED BY	SIGNED	SIGN ON BEHALF OF
Operator responsible	1.Approve	Thor Arnold	30/01/20 12:49	<button>Revoke</button>

View Logs for SJA

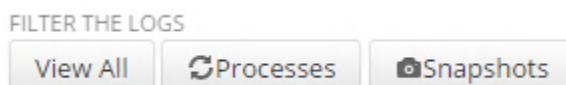
Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes and snapshots .

- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a snapshot that was taken at the time an item was Approved.
- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the **Logs** tab, click **View All**, **Processes**, or **Snapshots** to change the filter.



FORM	REFERENCES (3)	ATTACHMENTS (0)	SIGNATURES	LOGS
FILTER				
View all	Processes	Snapshots		
DATE ▾	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS
⌚ 20/05/20 03:09	[REDACTED]	Approve	100 - New	200 - Approved
⌚ 20/05/20 03:09	[REDACTED]		-	-
⌚ 20/05/20 03:09	[REDACTED]		-	-
16/04/20 12:32	[REDACTED]		-	-
				Created

◀ PAGE 1 OF 1 ▶

Icons

These icons appear on the Logs tab.

Icon	Description
⌚	A process change that moved the item from one status to another in the workflow process.
📷	Data snapshot - View a snapshot of unformatted data at a specific time.
📸	Form snapshot - View a snapshot of the form with data at a specific time.

View Snapshot

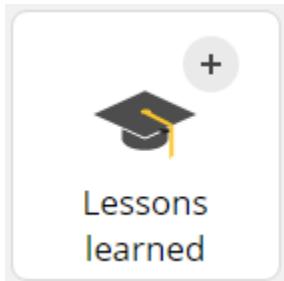
Snapshots

You can click the **Snapshot**  icon to display all the information for the current SJA when the snapshot was captured.

SJA-000141		SAFE JOB ANALYSIS																											
Status when printed: Approved																													
<p>NAME Entry of separation vessel</p> <p>DESCRIPTION Entry and inspection of separation vessel 002</p> <p>COMMENTS</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">ASSET</td> <td style="width: 15%;">AREA</td> <td style="width: 15%;">SYSTEM</td> <td style="width: 15%;">DISCIPLINE</td> <td style="width: 15%;">TAG</td> <td style="width: 15%;">RESPONSIBLE</td> </tr> <tr> <td>PLA</td> <td>P - PROCESS MODULE / AREA</td> <td></td> <td>M - Mechanical</td> <td></td> <td> <input checked="" type="checkbox"/> Has the main meeting been held? <input checked="" type="checkbox"/> Is the total risk acceptable? </td> </tr> </table>						ASSET	AREA	SYSTEM	DISCIPLINE	TAG	RESPONSIBLE	PLA	P - PROCESS MODULE / AREA		M - Mechanical		<input checked="" type="checkbox"/> Has the main meeting been held? <input checked="" type="checkbox"/> Is the total risk acceptable?												
ASSET	AREA	SYSTEM	DISCIPLINE	TAG	RESPONSIBLE																								
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<p>REQUIREMENTS / PRECONDITIONS Work permits, certification, approved isolation plan, entry guard and standby man. Gas measuring performed by competent person, before and during entry.</p> <p>SUMMARY</p>																													
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Lessons Learned

This section contains topics that relate to Lessons Learned.



Lessons Learned Library

This topic relates to [Lessons Learned](#).

Lesson Learned Library

The Lessons Learned Library holds all of the lessons for the current location.

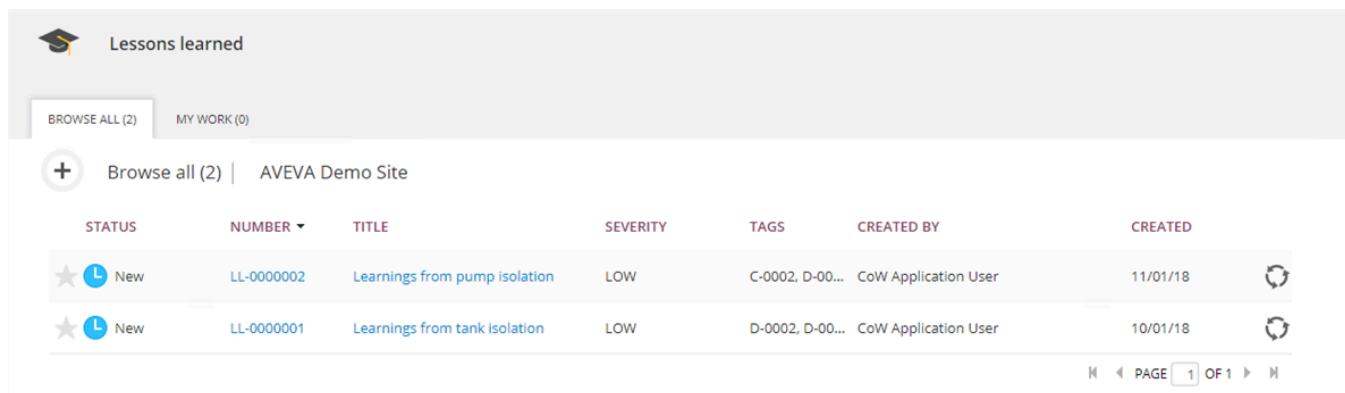
What is a Lesson Learned?

A Lesson Learned is a piece of experience or knowledge that has been acquired while doing work.

Library tabs

The Lessons Learned library page has the following tabs:

- [Browse All](#) - The **Browse All** tab lists all the Lessons Learned for particular location.
- [My Work](#) - The **My Work** tab shows only those Lessons Learned for particular location which are added to current user's My Work.
- [Quick filters](#) – These are pre-configured quick filters that show only items that are in a particular status.



The screenshot shows the 'Lessons learned' library page. At the top, there are two tabs: 'BROWSE ALL (2)' (which is selected) and 'MY WORK (0)'. Below the tabs, there is a header with a graduation cap icon and the text 'Lessons learned'. A '+' button and the text 'Browse all (2) | AVEVA Demo Site' are also present. The main area displays a table with two rows of data. The columns are: STATUS, NUMBER ▾, TITLE, SEVERITY, TAGS, CREATED BY, and CREATED. The first row shows 'New' status, number LL-0000002, title 'Learnings from pump isolation', low severity, tags C-0002, D-00..., created by CoW Application User on 11/01/18. The second row shows 'New' status, number LL-0000001, title 'Learnings from tank isolation', low severity, tags D-0002, D-00..., created by CoW Application User on 10/01/18. At the bottom right, there is a pagination control showing 'PAGE 1 OF 1'.

STATUS	NUMBER ▾	TITLE	SEVERITY	TAGS	CREATED BY	CREATED
New	LL-0000002	Learnings from pump isolation	LOW	C-0002, D-00...	CoW Application User	11/01/18
New	LL-0000001	Learnings from tank isolation	LOW	D-0002, D-00...	CoW Application User	10/01/18

Browse all lessons learned

The **Browse All** tab displays all the Lessons in the Lessons Learned library for this location.

View details of a Lesson Learned

- Click any row to view the [details tabs](#) of that Lesson Learned.

Create a new Lesson Learned

- Click the **Add**  icon to create new entity.

Add a Lesson Learned to My Work

- Click the **Star** icon  to add the lesson to [My Work](#). When an item is selected, the star turns yellow .

STATUS	NUMBER	TITLE	SEVERITY	TAGS	CREATED BY	CREATED AT
★ New	LL-000041	Entering separator need more venting	LOW	13BSY1072, 13ESY1080, 13FE1074		08/03/16 - 18:19
★ New	LL-000021	Entering TEST Separators	LOW	13BSV1072, 13ESV1060, 13ESV1080		07/03/16 - 17:53
▶ Active	LL-000001	Venting Separators of type XLU	HIGH	20VA001		14/01/16 - 10:53

Library icons

These icons appear on the Library page.

Icon	Name	Description
	My Work icon	Click the star icon to add the item to My Work .
	Signature icon	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status icon	Indicates the current status of the item.
	Process Workflow icon	Click the Workflow icon to show all the available processes for the current item.

Print Lesson Learned

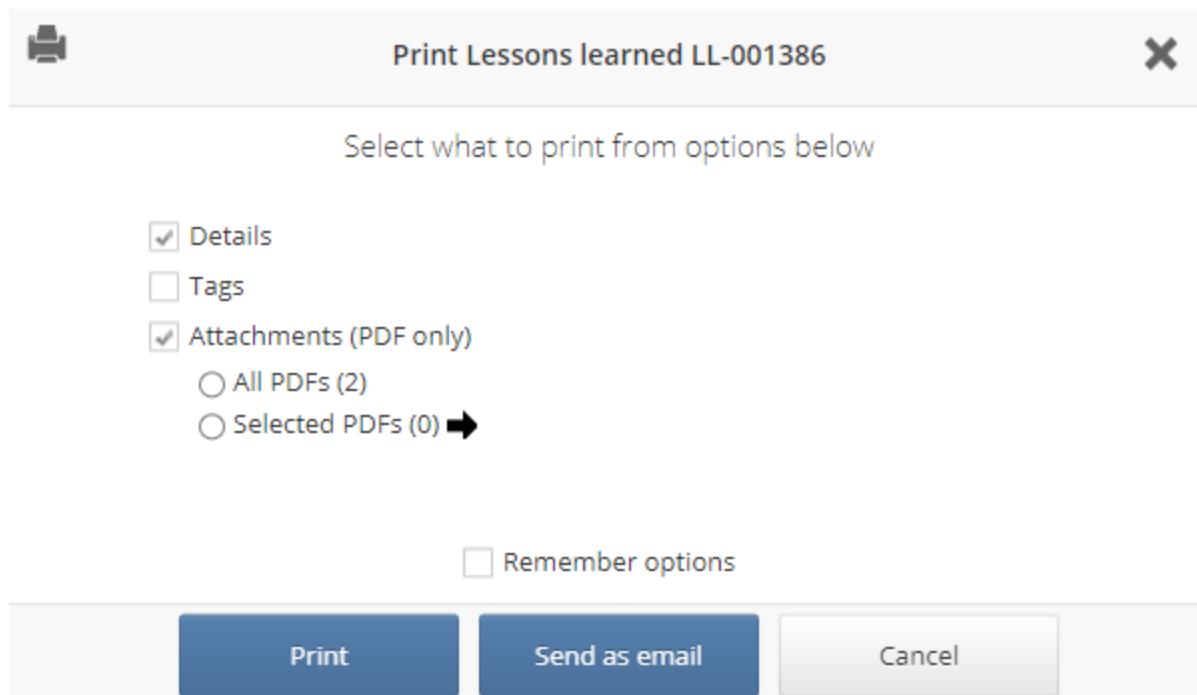
When printing a Lessons learned, you are given the option to print details, tags, and attachments at the same time.

Print a Lessons learned and its attachments

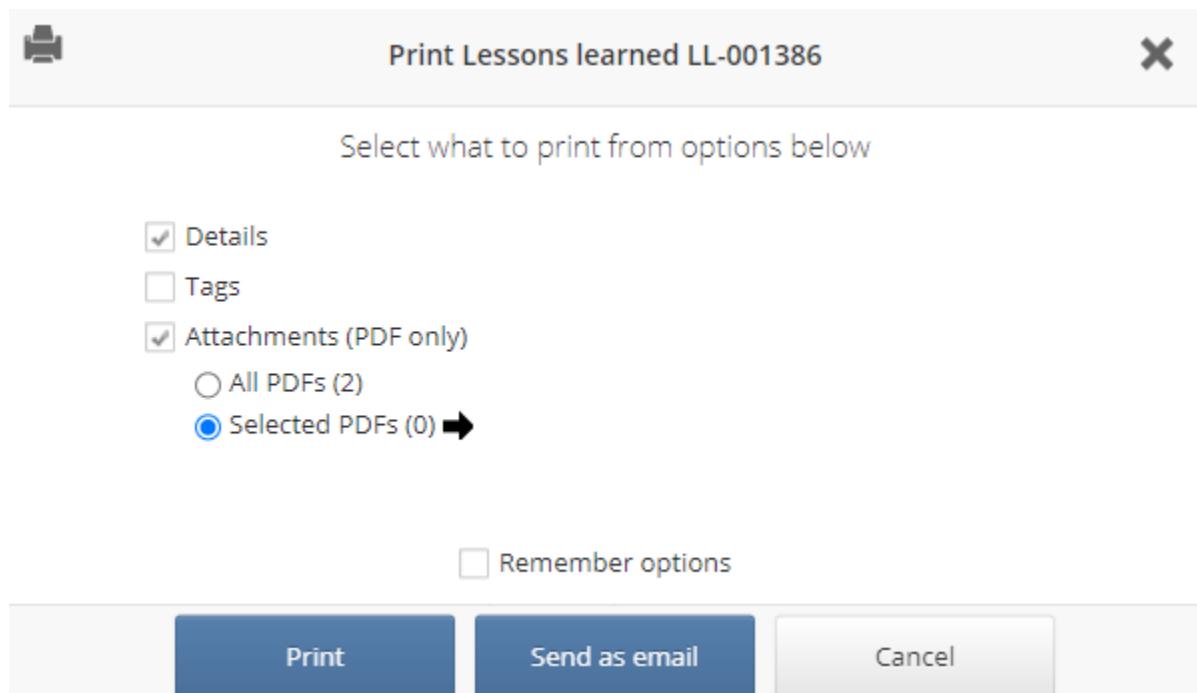
1. Open the Lessons learned and click the **Print** button.



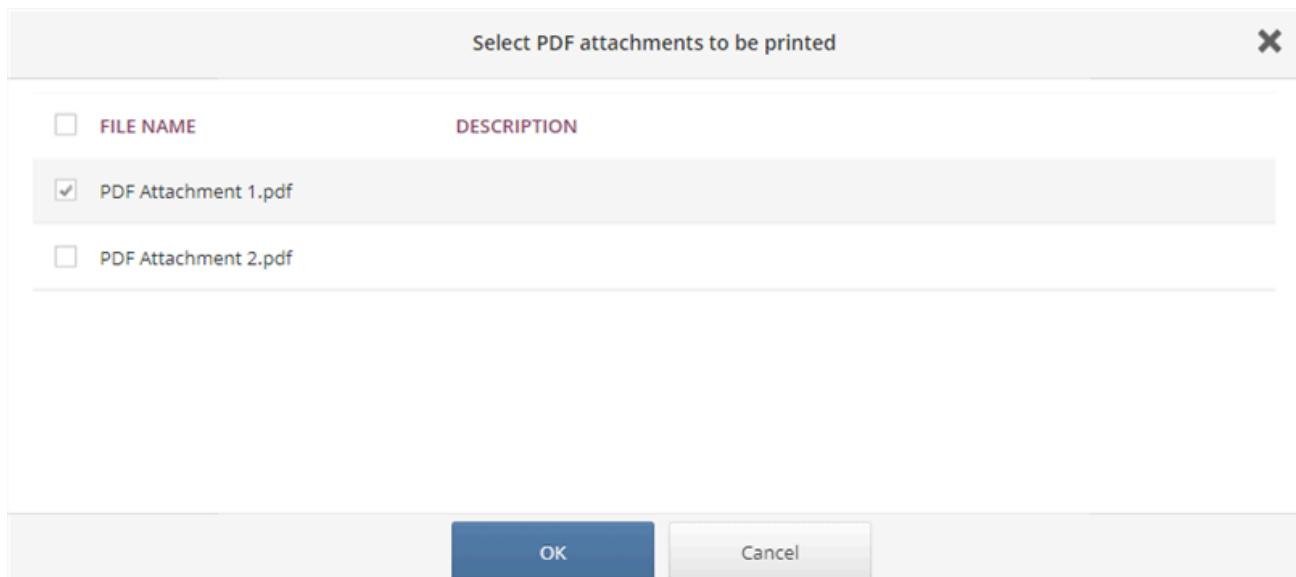
2. Select which details and linked items to print.
3. (Optional) If there is more than one PDF attachment, you can select the **Attachments** checkbox and choose whether to print all PDF attachments or select which PDFs to print.



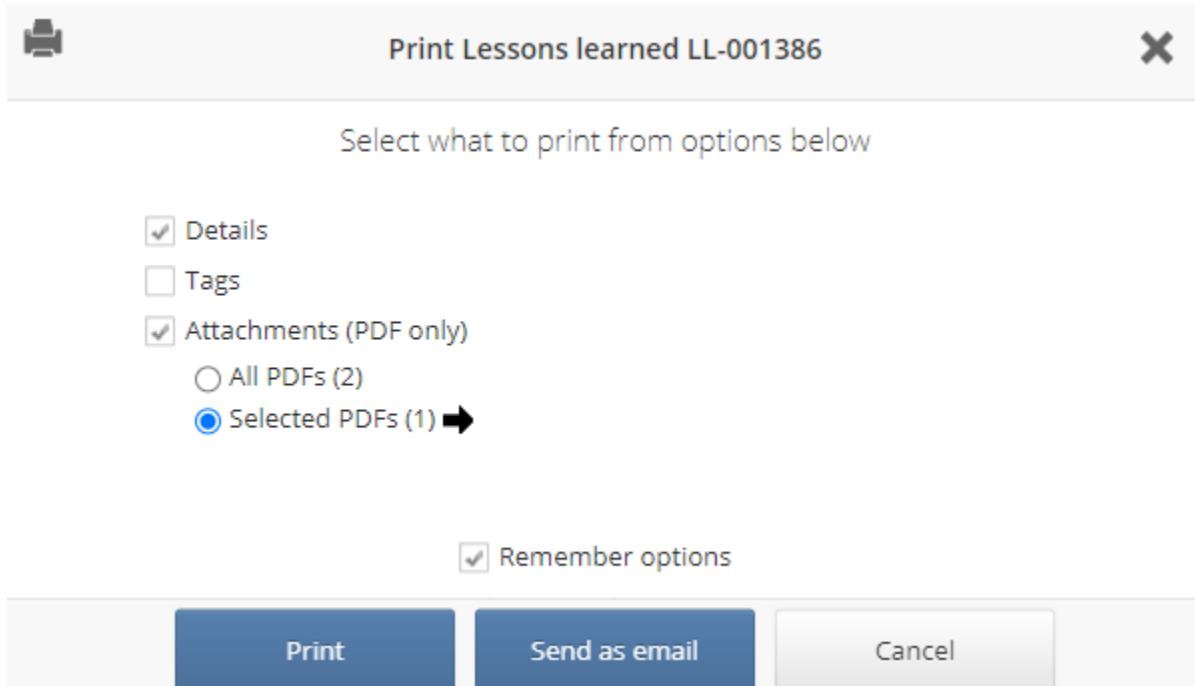
4. (Optional) Click the **Selected PDFs** option and then click the arrow ➔ icon.



5. Select the attachments you want to print and click **OK**.



6. (Optional) Select the **Remember options** checkbox to remember these print options for next time.



7. Click **Print**.

Details for Lessons Learned

When you click on a Lesson in the [Lessons Learned Library](#), you can access an overview of the details for that specific Lesson Learned.

Open a Lesson Learned

- Double-click a Lesson Learned in the Library.

Lesson Learned tabs

Each Lesson Learned has several tabs containing the details about the Lesson Learned.

OVERVIEW	ATTACHMENTS (0)
<ul style="list-style-type: none">• Overview	See an overview of the Lesson Learned details.
<ul style="list-style-type: none">• Attachments	Add attachments to the Lesson Learned.

Create a Lesson Learned

Overview tab

You can write the Lesson Learned in the given text area on left side of overview page. On the right side, you can search and add tags that you want to link to this particular Lesson Learned entity.

Information header

The [Information header](#) across the top of the screen provides details about the form and action buttons.

Tags linked to Lesson Learned

All the added [tags](#) will be visible with details, such as:

- Criticality of the tag
- Name
- Description
- Status

You can delete any of the tags until the Lesson Learned entity is in a non-editable status.

The screenshot shows a web-based application interface for managing lessons learned. At the top, there's a header with the AVEVA logo and the title "LL-0000001 Learnings from tank isolation". Below the header, there are status details: STATUS (100 - New), ASSET (AVEVA Demo Site), SEVERITY (LOW), CREATED BY (CoW Applicat...), CREATED (10/01/18), LAST CHANGED BY (DemoUser), and LAST CHANGED (30/05/18). The main content area has tabs for "OVERVIEW" (which is selected) and "ATTACHMENTS (0)". The "OVERVIEW" tab contains two sections: "Lessons learned" and "Tags linked to this lessons learned".

Lessons learned:

- Accessibility --

Manhole is located approx. 3 meters above floor level. Requires small stepladder or scaffolding. Limited space for scaffolding due to proximity to gas pressurization GT.
- Ventilation --

110mm vent OK accessibility in manhole
- Drainage timing --

SLAM draining took approx. 2 hours. Should be started by night shift.

Tags linked to this lessons learned:

TC	NAME	DESCRIPTION	STATUS
E-0001-B	BAYONET HEATER	Active	
V-0047	VALVE GATE ANSI B16.10 #300.RF	Active	
V-0060	VALVE GATE ANSI B16.10 #300.RF	Active	
V-0054	VALVE GATE ANSI B16.10 #300.RF	Active	
V-0102	VALVE GATE ANSI B16.10 #300.RF	Active	
V-0062	VALVE GATE ANSI B16.10 #300.RF	Active	

Manage Attachments for Lessons Learned

The **Attachments** tab contains of list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the icon to add a new attachment.

2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.

The screenshot shows the 'Add attachment' dialog box. At the top, it says 'Add attachment' and has a close button. Below that is a section labeled 'Attachment type' with a dropdown menu. The dropdown menu has three options: 'File storage' (which is selected), 'File storage' (disabled), and 'Internet address'. To the right of the dropdown is a blue 'Choose file' button. Below the dropdown, a message says 'No attachments has been uploaded yet'. At the bottom are two buttons: 'Upload all' (blue) and 'Cancel'.

4. If you are adding a URL, enter the URL, and click **Add web link**.

The screenshot shows the 'Add attachment' dialog box. At the top, it says 'Add attachment' and has a close button. Below that is a section labeled 'Attachment type' with a dropdown menu. The dropdown menu has one option: 'Internet address' (selected). To the right of the dropdown is a blue 'Add web link' button. Below the dropdown, there is a section labeled 'Enter URL' with an input field containing 'www.weatherstation.org.nz'. This input field is highlighted with a yellow border. Below the input field, a message says 'Attachments ready to be uploaded'. At the bottom are two buttons: 'Upload all' (blue) and 'Cancel'.

5. When you have finished adding files or URLs, click **Upload all**.

The screenshot shows the 'Attachments' tab of a document. At the top, there are tabs: FORM, PLOT LOCATION, REFERENCES (2), ATTACHMENTS (3) (which is selected), SIGNATURES, and LOGS. Below the tabs is a table with the following data:

FILE NAME	DESCRIPTION	ADDED BY	ADDED	
Attachment 1.pdf	Attachment 1	John Doe	08/18/22	
Attachment 2.pdf	Attachment 2	John Doe	08/18/22	
www.weatherstation.org.nz		John Doe	08/22/22	

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none">• File size is exceeded• File type is not supported
	Click the Delete icon to delete an existing attachment.

Shift Handover

This section contains topics that relate to Shift Handovers.



Shift Handover Library

The **Shift Handover** module enables you to register events that happen during a shift. The Shift Handover Library holds all of the shift logs and experience transfer items.

What is shift handover?

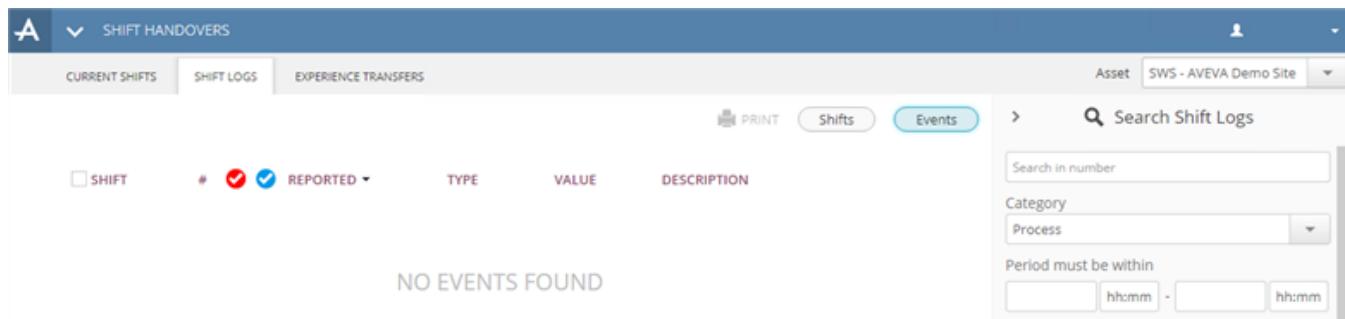
Shift Handover is the process of handing over a shift to the next shift of workers and communicating all

relevant information.

Library tabs

The Shift Handover Library has three main components.

- Current Shifts
- Shift logs
- Experience transfers



The screenshot shows the Shift Handovers library interface. At the top, there are three tabs: CURRENT SHIFTS, SHIFT LOGS (which is selected), and EXPERIENCE TRANSFERS. Below the tabs, there are filters for SHIFT (checkbox), TYPE (REPORTED dropdown with options #, ✓, and ✓), VALUE, and DESCRIPTION. A message 'NO EVENTS FOUND' is displayed. On the right side, there is a search panel with fields for 'Search in number', 'Category' (set to Process), and a time range selector for 'Period must be within'.

Current Shifts

View Current Shifts

The current shifts are displayed on the **Current Shift** tab in the Shift Handover module.

The available shifts depend on the selected category for the selected asset, as configured by the administrator.

Note: A shift is not created manually, but created automatically based on the configuration.

Category and Asset

A user can be part of one or many categories. However, only shifts for the selected category will display.



A horizontal filter bar with four sections: 'Current category' (dropdown menu), 'Select category' (dropdown menu), 'Asset' (dropdown menu), and 'FEL - Common All Fields' (dropdown menu).

Time window

On the **Current Shift** tab, you can define a *sliding window* using the **Last hours** field.

You can specify the number of hours to define how many shifts to display. The list will display all the shifts within this time frame.

Last hours

Shift List

The Current Shifts list shows the latest shift at the top and the older shifts below. Only the latest two shifts will be editable. All the other shifts are closed.

SL-0003610 25/09/2018 07:00 - 19:00						
Date	Time	Type	Value	Description	On behalf of	
25/09/2018	18:02	Type	Select or search by code/name	Pump A is having a leakage		
25/09/2018	17:54	Discipline	I	Pump A is having a leakage		
#	REPORTED ▾	TYPE	VALUE	DESCRIPTION		
1	<input checked="" type="checkbox"/>	25/09/2018 17:54	Discipline	I	Pump A is having a leakage	
2	<input checked="" type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure	

SL-0003609 24/09/2018 19:00 - 07:00					
Date	Time	Type	Value	Description	On behalf of
25/09/2018	07:00	Type	Select or search by code/name	Pump B is having too high pressure	
25/09/2018	07:00	Discipline	I	Pump B is having too high pressure	

SL-0003608 24/09/2018 07:00 - 19:00					
-------------------------------------	--	--	--	--	--

SL-0003607 23/09/2018 19:00 - 07:00					
-------------------------------------	--	--	--	--	--

SL-0003606 23/09/2018 07:00 - 19:00					
-------------------------------------	--	--	--	--	--

Add events to current shift

You can add a shift event to the current shift.

Add an event to current shift

1. On the **Current Shifts** tab of the Shift Handover module, enter the event details into the blank top entry on the page.

2. Click **Add** to add the event to the shift log.



Locked shifts

If the Shift category is configured with *Shift has signing* and *Close shift when signing has started*, then it's not possible to do further addition/editing/deletion of events for that shift. The Shift events will be read-only to prevent any changes.

Edit and delete events from current shift

Edit events in current shift

1. On the **Current Shifts** tab of the Shift Handover module, locate the event to edit.
2. Click the **Edit** icon at the end of the row.

#	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REPORTED ▾	TYPE	VALUE	DESCRIPTION	
1	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 17:54	Discipline	I	Pump A is having a leakage	
2	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure	

The event becomes be editable.

3. Make the needed changes and click the **Confirm** or **Discard** icon.

#	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REPORTED ▾	TYPE	VALUE	DESCRIPTION	
1	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 17:54	Discipl...	I - Inspection	Pump A is having a leakage	

Delete events from current shift

1. On the Current Shifts tab of the Shift Handover module, locate the event to delete.
2. Click the **Delete** icon at the end of the row.

#	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REPORTED ▾	TYPE	VALUE	DESCRIPTION	
1	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 17:54	Discipline	I	Pump A is having a leakage	
2	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure	

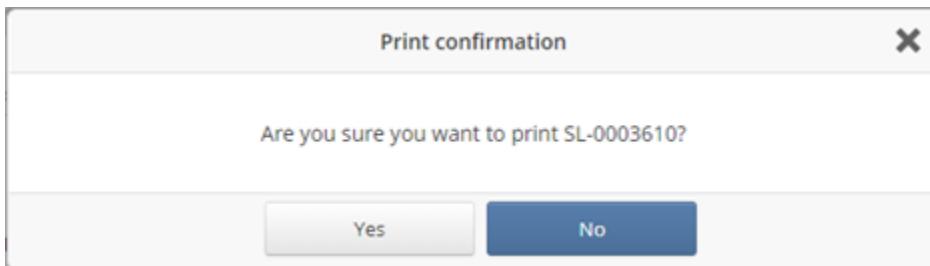
Generate a shift report

Generate a shift report

1. On the **Current Shifts** tab, click the **Print** icon next to the relevant shift

The screenshot shows the 'Current Shifts' tab interface. At the top, there is a header with 'SL-0003610' and the date '25/09/2018 07:00 - 19:00'. To the right of the header is a 'PRINT' button with a printer icon, which is highlighted with a yellow box. Below the header are four input fields: 'Date' (25/09/2018), 'Time' (18:29), 'Type' (a dropdown menu set to 'Type'), and 'Value' (a dropdown menu with the placeholder 'Select or search by code/nan'). To the right of these fields is an 'Add' button.

2. You will be prompted to confirm that you want to generate the printout. Click **Yes**.



A default report is generated and displays as PDF in the browser.

The screenshot shows a 'Shift Handover' report table. The header row includes columns for '#', 'REPORTED' (with checkboxes for 'Check In' and 'Check Out'), 'TYPE', 'VALUE', and 'DESCRIPTION'. The body of the table contains two rows of data:

#	REPORTED	TYPE	VALUE	DESCRIPTION	
1	<input checked="" type="checkbox"/> <input type="checkbox"/>	25/09/2018 17:54	Discipline	I	Pump A is having a leakage
2	<input type="checkbox"/> <input checked="" type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure

Details at the top right of the table: Category 'Instrumental', Printed '25/09/2018 18:42'.

Sign outgoing and incoming shifts

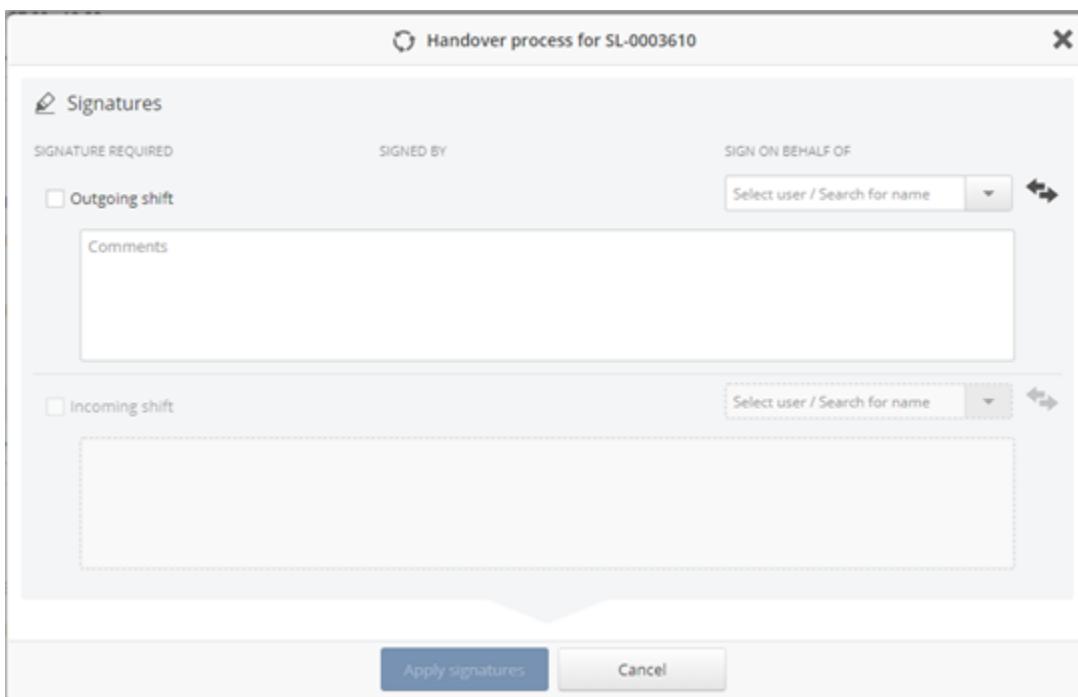
Signing outgoing and incoming shifts

The system may be configured to have requirements for signing outgoing and incoming shifts.

Add a signature

1. Click the green **Signature** icon.

The *Handover process* dialog box appears.



2. Select the **Outgoing shift** checkbox to sign the outgoing shift.
3. (Optional) Add a comment to the Comments field.
4. If needed, use **Sign on behalf of** option to sign on behalf of a user that is not present.
5. Click **Apply signature** to add the signature.

When the Outgoing shift is signed, the next incoming shift becomes editable and can be signed.

Adding and withdrawing signatures

Adding and withdrawing signatures

It's only possible to add signatures for the current and previous shift.

If no signatures are added, even if it's a requirement, the shift will still be closed with no signatures added. This does not stop the 'sliding window' of shifts to continue.

Icons

A requirement for adding a signature is then only indicated with the green icon.

	The green icon indicates that signatures are needed.
	The transparent icon indicates that the signature process has already taken place.

Withdraw a signature

It's also possible to withdraw a signature. This is reflected on the Signature tab.

The screenshot shows the 'Signature' tab for event SL-0003609. The top section contains fields for Date (25/09/2018), Time (07:00), Type (Type), Value (Select or search by code/nan), Description, and On behalf of. Below this is a table with columns: #, REPORTED, TYPE, VALUE, and DESCRIPTION. The first row shows a withdrawn signature (indicated by a red checkmark) for 'Discipline' at 25/09/2018 07:00 with the value 'I' and description 'Pump B is having too high pressure'. The bottom section shows the event details again with a withdrawn signature icon.

#	REPORTED	TYPE	VALUE	DESCRIPTION
1	<input checked="" type="checkbox"/> <input type="checkbox"/>	25/09/2018 07:00	Discipline	I Pump B is having too high pressure

Add attachments to event

You can add an attachment to an event. This needs to be done after the event is added and clicking on the 'attachment' icon as shown below.

The icon displays the number of attachments added.

Add attachment to current shift

- On the **Current Shifts** tab of the Shift Handover module, locate the event to edit.
- Click the **Attachment** icon at the end of the row.

The screenshot shows the event details for SL-0003609. The attachments icon (a paperclip with a number) is highlighted with a yellow box. It shows two attachments: one for 'Discipline' at 25/09/2018 17:54 with the value 'I' and description 'Pump A is having a leakage', and another for 'Discipline' at 25/09/2018 07:00 with the value 'I' and description 'Pump B is having too high pressure'.

Attachments list

The Attachments page displays showing a list of the existing attachments.

- Click **Add** icon to add a new attachment.

- Click **Delete** icon to delete an attachment.
- Click **Return** icon to returning to the main page.

The screenshot shows a shift log entry and a file attachment. The shift log entry details are:

SHIFT	EVENT	REPORTED	TYPE	VALUE	ASSET	DESCRIPTION
SL-0003610	2	25/09/2018 07:00	Discipline	I		Pump B is having too high pressure

Below the shift log, there is a file attachment table:

FILE NAME	DESCRIPTION	ADDED BY	ADDED
www.vg.no			25/09/2018

At the bottom right of the interface, there are navigation icons: a left arrow, a right arrow, a trash can, and a search icon. The page number is shown as 'PAGE 1 OF 1'.

Shift logs

Shift Logs tab

The **Shift Logs** tab provides list of all generated shift logs and events.

- [Shifts view](#) - All the registered Shift Logs.
- [Events view](#) - All the events registered in the shift logs.

Switch between Shifts view and Events view

- Click the **Shifts** and **Events** buttons in the upper right corner.



Search Shift logs

You can search for shift logs or events with the Search panel. See [Search for shift logs and events](#).

Auto-generated

The shift logs are generated automatically based on the configuration as described in the *AVEVA™ Operational Safety Management Administrator Help*.

You cannot create new shift logs manually. The data is created automatically based on the Shift categories that determines information such as:

- When a shift should start.
- The amount of time in a shift.
- How many shifts in a 24-hour time period.

SHIFT	PERIOD	EVENTS			
SL-0003610	25/09/2018 07:00 - 19:00	0	0	0	0
SL-0003609	24/09/2018 19:00 - 07:00	0	0	0	0
SL-0003608	24/09/2018 07:00 - 19:00	0	0	0	0
SL-0003607	23/09/2018 19:00 - 07:00	0	0	0	0
SL-0003606	23/09/2018 07:00 - 19:00	0	0	0	0
SL-0003605	22/09/2018 19:00 - 07:00	0	0	0	0
SL-0003604	22/09/2018 07:00 - 19:00	0	0	0	0

Events view

Switch to Events view

- On the Shift Logs tab, click the **Events** button.

Shifts

Events

SHIFT	#			REPORTED	TYPE	VALUE	DESCRIPTION
SL-0003610	1	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 17:54	Discipline	I	Pump A is having a leakage
SL-0003609	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure
SL-0003610	2	<input type="checkbox"/>	<input type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure

Icons

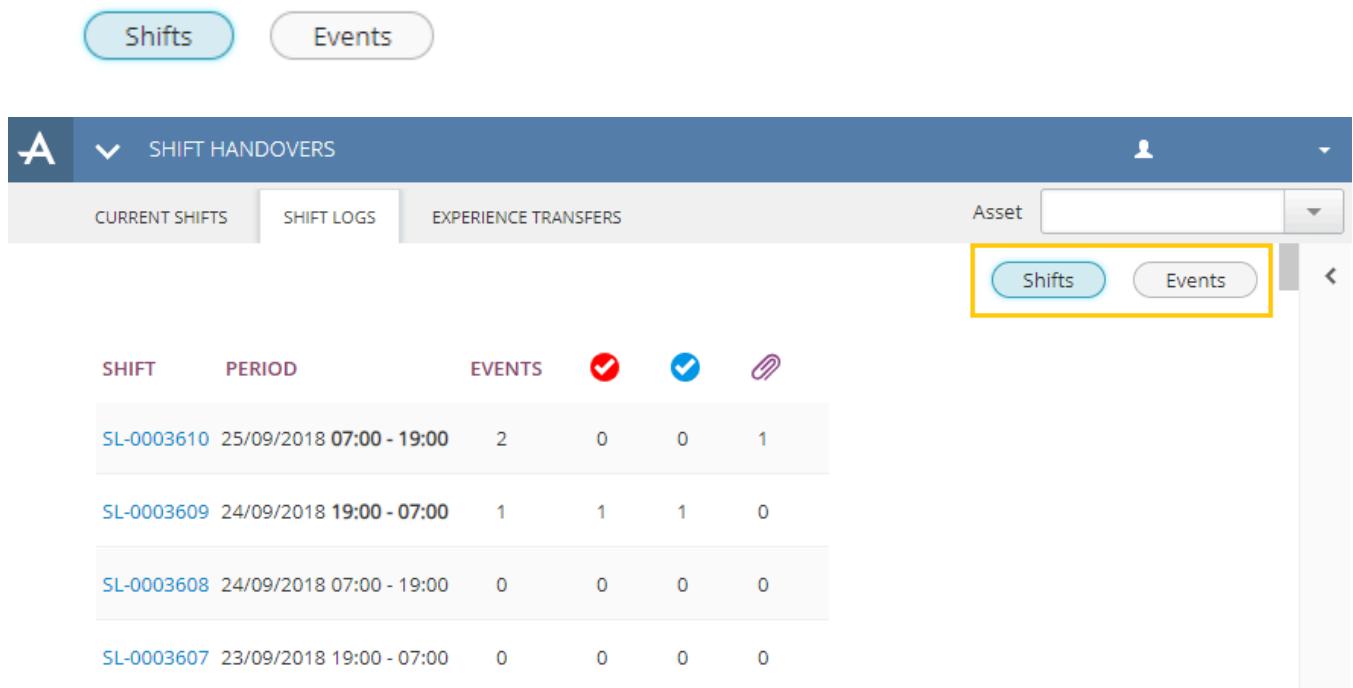
These icons appear on the Events view.

Icon	Description
✓ (red)	Event copied to the next shift.
✓ (blue)	Event for experience transfer.
📎	Attachment

Shifts view

Switch to Shifts view

- On the **Shift Logs** tab, click the **Shifts** button.



The screenshot shows the 'SHIFT HANDOVERS' page. At the top, there are tabs for 'CURRENT SHIFTS', 'SHIFT LOGS', and 'EXPERIENCE TRANSFERS'. Below these tabs, there is a search bar labeled 'Asset' and two buttons: 'Shifts' and 'Events', with 'Shifts' being highlighted by a yellow box. The main area displays a table with four rows of shift information. Each row includes columns for 'SHIFT', 'PERIOD', 'EVENTS', and three icons corresponding to the ones in the Events view table above. The first row shows 2 events, 0 copied, 0 transferred, and 1 attachment. The second row shows 1 event, 1 copied, 1 transferred, and 0 attachments. The third row shows 0 events, 0 copied, 0 transferred, and 0 attachments. The fourth row shows 0 events, 0 copied, 0 transferred, and 0 attachments.

SHIFT	PERIOD	EVENTS	✓ (red)	✓ (blue)	📎
SL-0003610	25/09/2018 07:00 - 19:00	2	0	0	1
SL-0003609	24/09/2018 19:00 - 07:00	1	1	1	0
SL-0003608	24/09/2018 07:00 - 19:00	0	0	0	0
SL-0003607	23/09/2018 19:00 - 07:00	0	0	0	0

Icons

These icons appear on the Shifts view.

Icon	Description
	Event copied to the next shift.
	Event for experience transfer.
	Linked isolation plans

Search for shift logs and events

Search

You can search for Shifts and Events with the Search panel.

Open the Search panel

1. Click the icon on right side of the screen. The Search panel expands with different parameters, depending on the type of entity.
2. Select the search details and click **Search** to search the current tab with the given parameters.

Reset the search query

- Click **Reset** to reset the query values.



When you are finished, click to close the Search panel.

Search Events

Search by description

Area

Select or search by code/name 

System

Select or search by code/name 

Discipline

Select or search by code/name 

Tags

Search for number, name or description (min c) 

Misc.

Search by value

Reported between

hh:mm - hh:mm

Created by

Select user / Search for name 

Event copied to the next shift

Event for experience transfer

Fill out Shift Event fields

These are the fields for a Shift Event item.

Field	Description
• <i>Date</i>	Date for the event.
• <i>Time</i>	Time for the event.
• <i>Type</i>	Select an event type as of Area, Discipline, System, Tag, Misc.
• <i>Value</i>	Select the value itself which is based on the type selected. For the type Misc, this is a free text field.
• <i>Description</i>	A description for the event added.
• <i>On behalf of</i>	A person which this event is registered on behalf of.

Mark an event as available for experience transfer

Available events

In the experience transfer entity, only the registered events which have the checkbox under the blue icon will be available.

Mark an event as available

- Select the checkbox under blue icon to **Mark an event to be available for experience transfer**.

#	REPORTED ▾	TYPE	VALUE	DESCRIPTION	
1	<input checked="" type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure

Copy an event to current shift

You can choose to automatically copy an event from a previous shift to the current shift by selecting the **Mark an event to be copied to the next shift** checkbox under the red checkmark icon . The number becomes highlighted in red in the current shift as shown.

#	REPORTED ▾	TYPE	VALUE	DESCRIPTION		
1	<input type="checkbox"/>	25/09/2018 17:54	Discipline	I	Pump A is having a leakage	
2	<input type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure	

SL-0003609 24/09/2018 19:00 - 07:00 PRINT

Date: 25/09/2018 Time: 07:00 Type: Type Value: Select or search by code/nan Description: On behalf of: Add

#	REPORTED ▾	TYPE	VALUE	DESCRIPTION		
1	<input checked="" type="checkbox"/>	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure	

Details for shift logs

When you click on a shift log in the [Shift Handover Library](#), you can access an overview of the details for that specific shift log.

Read only

It will not be possible to edit the shift log, only view it.

Any adding or editing of events needs to be done on the [Current Shifts](#) page.

Shift Log tabs

Each shift log has these tabs containing the details about the shift log.

EVENTS	ATTACHMENTS (1)	SIGNATURES (0)
<ul style="list-style-type: none"> Events 	View shift events associated with shift log.	
<ul style="list-style-type: none"> Attachments 	Add attachments to the shift log.	

- Signatures

View signatures for shift log.

View events for shift log

Events tab

The **Events** tab provides an overview of the registered events for that shift log.

Information header

The **Information header** across the top of the screen provides details about the form and action buttons.

#	REPORTED	TYPE	VALUE	DESCRIPTION
1	<input checked="" type="checkbox"/>	Discipline		Pump A is having a leakage
2	<input type="checkbox"/>	Discipline		Pump B is having too high pressure

Icons

These icons appear on the Events tab.

Icon	Description
	Event copied to the next shift.
	Event for experience transfer.
	Linked isolation plans

Manage attachments for shift log

The **Attachments** tab contains a list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

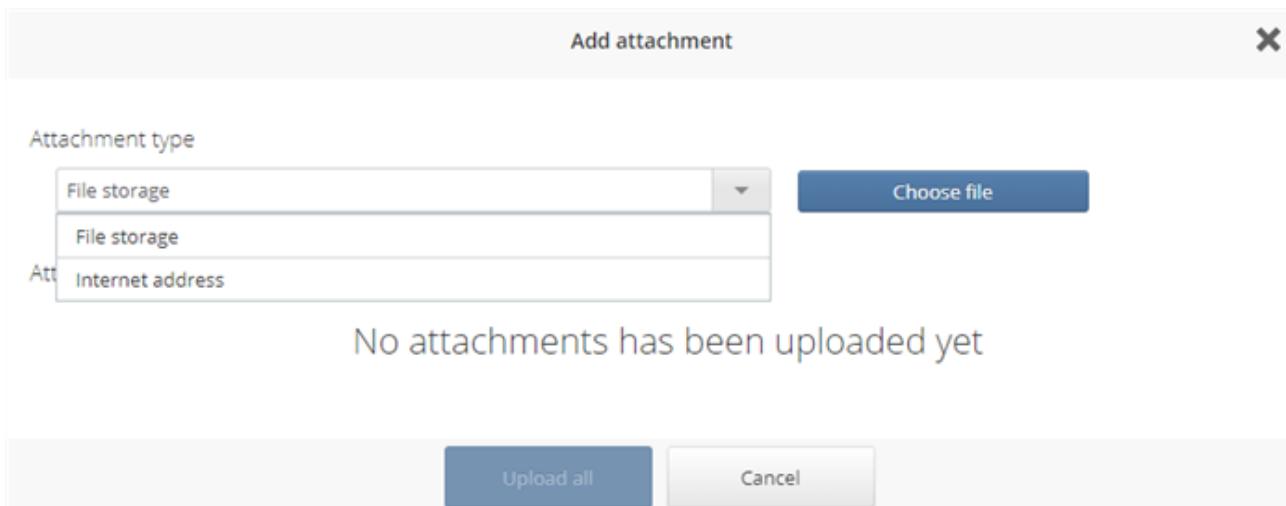
- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

1. Select the  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



4. If you are adding a URL, enter the URL, and click **Add web link**.

Add attachment X

Attachment type

Internet address ▼ Add web link

Enter URL

Attachments ready to be uploaded
No attachments has been uploaded yet

Upload all Cancel

5. When you have finished adding files or URLs, click **Upload all**.

FORM	PLOT LOCATION	REFERENCES (2)	ATTACHMENTS (3)	SIGNATURES	LOGS																				
			+																						
			<table><thead><tr><th>FILE NAME</th><th>DESCRIPTION</th><th>ADDED BY</th><th>ADDED</th><th></th></tr></thead><tbody><tr><td>Attachment 1.pdf</td><td>Attachment 1</td><td>View Details</td><td>08/18/22</td><td>Edit Delete</td></tr><tr><td>Attachment 2.pdf</td><td>Attachment 2</td><td>View Details</td><td>08/18/22</td><td>Edit Delete</td></tr><tr><td>www.weatherstation.org.nz</td><td></td><td>View Details</td><td>08/22/22</td><td>Edit Delete</td></tr></tbody></table>	FILE NAME	DESCRIPTION	ADDED BY	ADDED		Attachment 1.pdf	Attachment 1	View Details	08/18/22	Edit Delete	Attachment 2.pdf	Attachment 2	View Details	08/18/22	Edit Delete	www.weatherstation.org.nz		View Details	08/22/22	Edit Delete		
FILE NAME	DESCRIPTION	ADDED BY	ADDED																						
Attachment 1.pdf	Attachment 1	View Details	08/18/22	Edit Delete																					
Attachment 2.pdf	Attachment 2	View Details	08/18/22	Edit Delete																					
www.weatherstation.org.nz		View Details	08/22/22	Edit Delete																					

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.

Icon	Description
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

View signatures for shift log

Signatures tab

The **Signatures** tab provides an overview of the added signatures for the incoming and outgoing shifts. This also includes any signature removal and a record of the person who removed the signature, included a timestamp for when this happened.

ROLE	SIGNED BY	SIGNED	SIGN ON BEHALF OF	COMMENTS	REMOVED BY	REMOVED
Incoming shift		25/09/2018 19:...	OIM	This is hereby signed by the incoming shift, on behalf of OIM		25/09/2018 19:...
Outgoing shift		25/09/2018 19:...		This is hereby signed by the outgoing shift		

Experience transfers

What is an experience transfer?

An Experience Transfer is a set of events from a shift category that happened within a certain time period. A supervisor can select a subset of events to include in an Experience Transfer. Multiple subsets can be selected from the same shift category with different time queries.

Shift events

Events from this period, with the blue icon selected become part of the experience transfer.

It's also possible to add additional events and attachments which will become part of the experience transfer.

Experience Transfers tab

On the Experience Transfers tab, you can view all the created experience transfers and Events for this location.

[Transfers](#) [Events](#)

Toggle between the two views.

- [Transfers](#) - All the registered experience transfers.
- [Events](#) - All the events registered in the experience transfers.

Create a new experience transfer

Click the **Add (+)** icon to create a new experience transfer.

Search for experience transfer or event

Use the Search panel to perform a search for experience transfers or events.

TRANSFER	TITLE	FROM	TO	STATUS	EVENTS	CREATED	CREATED BY	EDIT	DELETE
ET-0000242		23/08/2018 00:00	25/08/2018 00:00	New	3	24/08/2018	1		
ET-0000241		23/08/2018 00:00	25/08/2018 00:00	New	2	24/08/2018	0		
ET-0000223		14/08/2018 07:00	15/08/2018 19:00	New	1	16/08/2018	0		
ET-0000222		15/08/2018 08:00	15/08/2018 18:00	New	0	15/08/2018	0		
ET-0000209		01/07/2018 00:00	09/07/2018 00:00	New	4	09/07/2018	3		
ET-0000202		25/06/2018 00:00	06/07/2018 00:00	New	3	02/07/2018	2		
ET-0000161		09/06/2018 00:00	12/06/2018 00:00	New	7	11/06/2018	1		

Transfers view

Switch to Transfers view

- Click the **Transfers** button.

[Transfers](#) [Events](#)

Experience Transfers									Asset	Transfers	Events	<
TRANSFER	TITLE	FROM	TO	STATUS	EVENTS	CREATED	CREATED BY					
ET-0000242	Lifeboat maintenance	23/08/2018 00:00	25/08/2018 00:00	New	3	24/08/2018						
ET-0000241	Replacement of pump A	23/08/2018 00:00	25/08/2018 00:00	New	2	24/08/2018						
ET-0000223	Tank pressure	14/08/2018 07:00	15/08/2018 19:00	New	1	16/08/2018						
ET-0000222	Top deck welding	15/08/2018 08:00	15/08/2018 18:00	New	0	15/08/2018						
ET-0000211	Crane extensions	08/07/2018 07:00	10/07/2018 19:00	New	1	10/07/2018						
ET-0000209	Scaffolding needed	01/07/2018 00:00	09/07/2018 00:00	New	4	09/07/2018						
ET-0000202	Painting of surface on heli...	25/06/2018 00:00	06/07/2018 00:00	New	3	02/07/2018						

Icons

These icons appear on the Transfers view.

Icon	Description
	Click the Add icon to add a new attachment.
	Number of attachments.
	Indicates that the original event has been changed.
	Click the Delete icon to delete an existing attachment.

Events view

Switch to Events view

- Click the **Events** button.

Transfers

Events

Icons

These icons appear on the Experience Transfers view.

Icon	Description
	Click the Add icon to add a new attachment.
	Number of attachments.
	Indicates that the original event has been changed.
	Click the Delete icon to delete an existing attachment.

Search for transfers and events

You can search for Shifts and Events with the Search panel.

Open the Search panel

1. Click the icon on right side of the screen. The Search panel expands with different parameters, depending on the type of entity.
2. Select the search details and click **Search** to search the current tab with the given parameters.

Reset the search query

- Click **Reset** to reset the query values.



When you are finished, click to close the Search panel.

>  Search Transfers

Search by number or title ...

Category
Instrumental

Status
 100 - New
 200 - Approved
 800 - Closed

Created between

Created by
Select user / Search for name

 Search Events

Search by description

Area
Select or search by code/name 

System
Select or search by code/name 

Discipline
Select or search by code/name 

Tags
Search for number, name or description (min c) 

Misc.
Search by value

Reported between

Created by Reset

  Search Reset all filters

Work with experience transfers

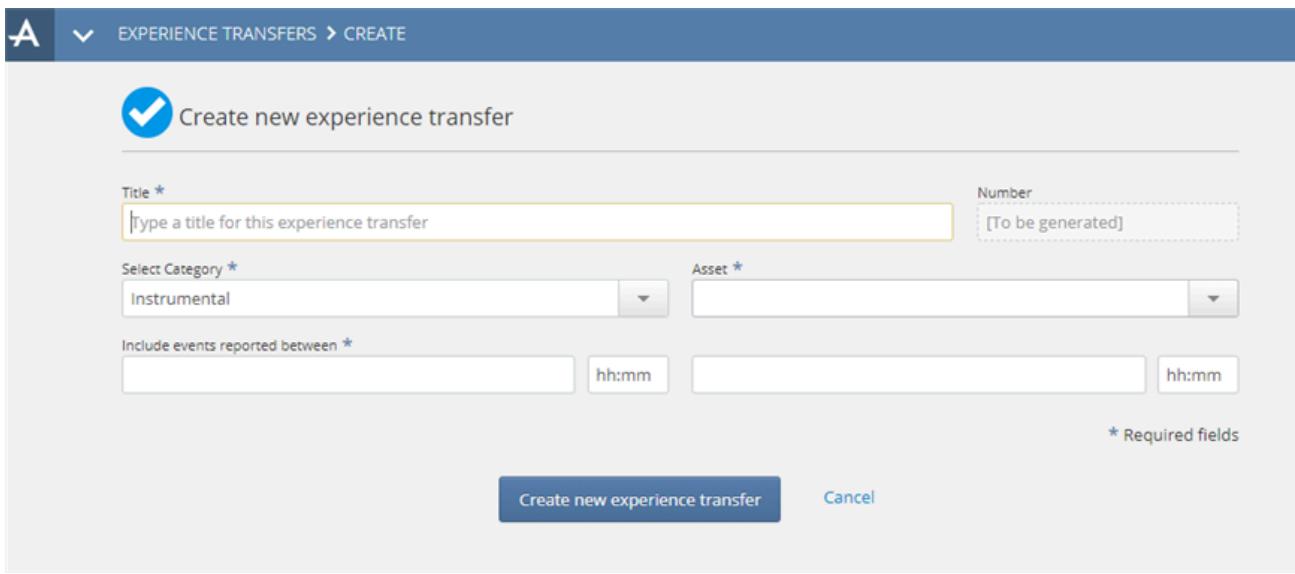
Working with experience transfers.

- Create new experience transfer
- Edit an experience transfer
- Approval workflow for experience transfer
- Print an experience transfer

Create new experience transfer

Create a new experience transfer

1. In the [Shift Handover Library](#), on the Experience Transfers tab, click the **Add**  button.
2. On the Create new experience transfer screen, enter the details. The fields with a blue star indicated required information.
For more information, see [Fill out experience transfer fields](#).
3. Click **Create new experience transfer**.



The screenshot shows the 'Create new experience transfer' dialog box. At the top, there's a title bar with the AVEVA logo and the path 'EXPERIENCE TRANSFERS > CREATE'. Below the title bar, the main form has a header 'Create new experience transfer' with a checkmark icon. The form contains several input fields:

- Title ***: A text input field with placeholder text 'Type a title for this experience transfer'.
- Number**: A text input field with placeholder text '[To be generated]'.
- Select Category ***: A dropdown menu currently set to 'Instrumental'.
- Asset ***: A dropdown menu.
- Include events reported between ***: Two date/time input fields for selecting a range.

At the bottom right of the form, there's a note '* Required fields'. At the very bottom are two buttons: 'Create new experience transfer' (in blue) and 'Cancel'.

Next step: [Add events for experience transfers](#)

Fill out experience transfer fields

These are the fields on the **Create new experience transfer** form. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	The title for the experience transfer.
• <i>Number</i>	The form number will be auto-generated with the prefix .
• <i>Select Category*</i>	The Shift category which this experience transfer will be created for.
• <i>Site*</i>	The Site this experience transfer will be created for.
• <i>Include events reported between</i>	All the events that occurred within this time period and with a blue icon checked will be part of the experience transfer.

EXPERIENCE TRANSFERS > CREATE

Create new experience transfer

Title *

Number

Select Category *

Asset *

Include events reported between * hh:mm hh:mm

* Required fields

Create new experience transfer **Cancel**

Edit an experience transfer

Edit an experience transfer

1. You can edit a transfer by clicking the **Edit** icon in the upper-right corner.

2. On the **Update Experience transfer** dialog box, you can edit the values.

3. Click **Save Changes**.

Approval workflow for experience transfer

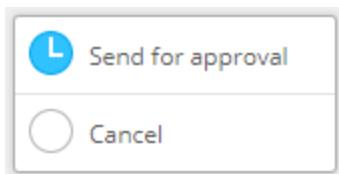
Approval workflow

A simplified workflow is part of the experience transfer.

Approve	New > Approved
Reset to New	Approved > New
Close	New > Closed Approved > Closed

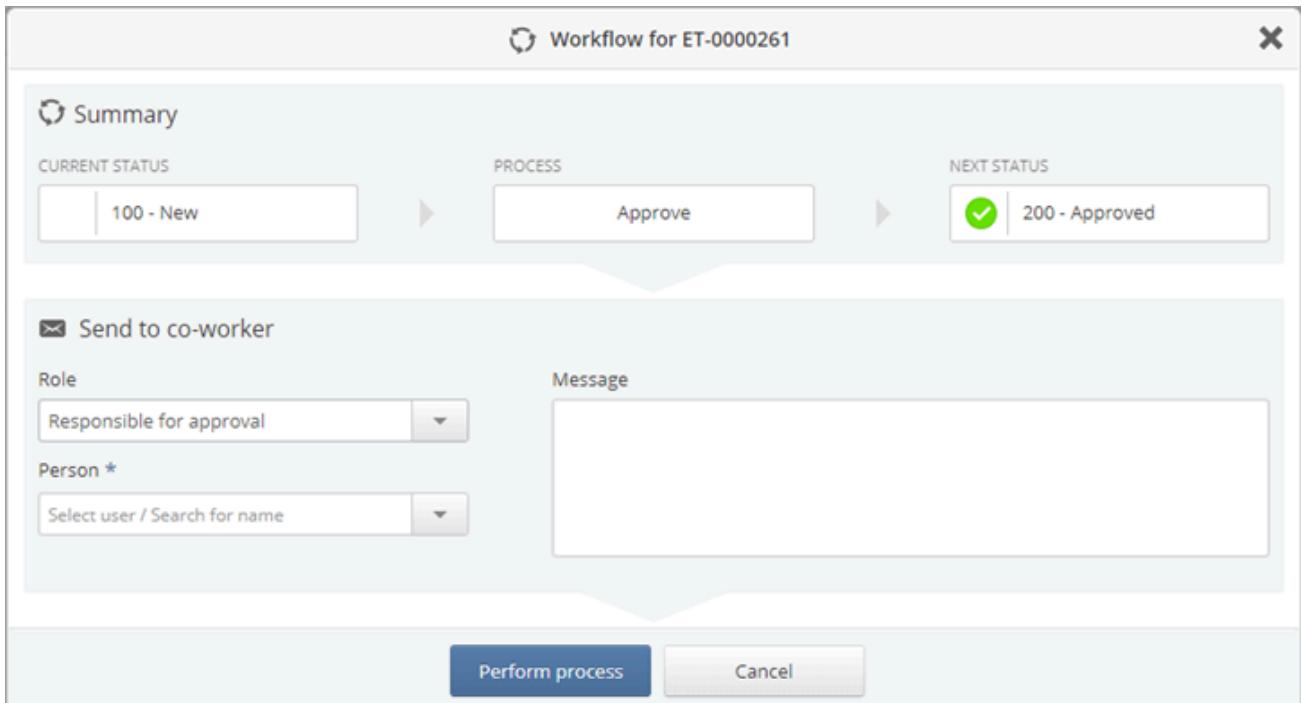
Process the workflow

1. Click **Workflow** in the upper-right corner and the select the appropriate process.



The **Workflow** dialog box appears.

2. You can specify the name and role of the person to send to for approval, and add a message.
3. Click **Perform process**.

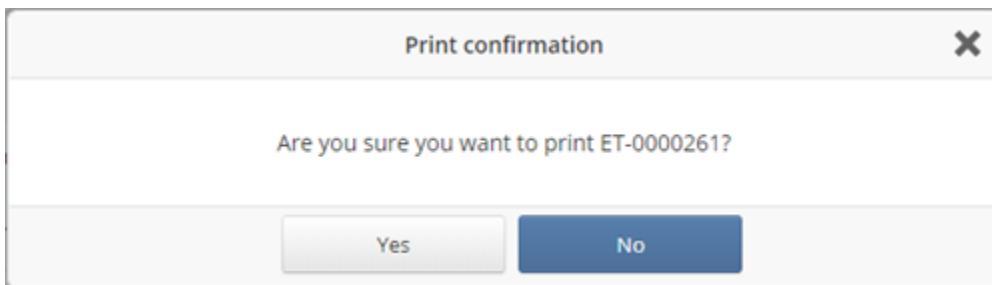


Print an experience transfer

You can generate a PDF of an experience transfer.

Print an experience transfer

1. Click the **Print** icon in the upper-right corner to generate a default printout. You will be prompted to confirm the printout.
2. Click **Yes**.



A printout will be generated as a PDF and display in the browser window.

Experience transfer

Category
Instrumental

Printed
25/09/2018 20:42

Discipline I

Pump B is having too high pressure

25/09/2018 07:00

Details for experience transfer

Details tabs for experience transfers

When you click on an experience transfer in the Library, you can access an overview of the details for that specific experience transfer.

Open an experience transfer

- Double-click an experience transfer in the Library.

Experience Transfer tabs

Each experience transfer has several tabs containing the details about the experience transfer.

EVENTS (1)	ATTACHMENTS (0)	LOGS
<ul style="list-style-type: none">• Events	Add events to the experience transfer.	
<ul style="list-style-type: none">• Attachments	Add attachments to the experience transfer.	
<ul style="list-style-type: none">• Logs	View log for the experience transfer.	

Add events for experience transfers

Events tab

The **Events** page shows all the events that are part of this experience transfer.

Information header

The [Information header](#) across the top of the screen provides details about the form and action buttons.

Add an event

- Add additional events

STATUS	ASSET	FROM	TO	CATEGORY	CREATED	CREATED BY
100 - New	ET-0000261	24/09/2018 07:00	25/09/2018 19:00	Instrumental	25/09/2018 20:33	

EVENTS (1)		ATTACHMENTS (0)	LOGS
Type	Type	Value	Description
	Select or search by code/n		
			On behalf of
			<input type="text"/>
			<input type="button" value="Add"/>

#	REPORTED ▼	TYPE	VALUE	DESCRIPTION
1	25/09/2018 07:00	Discipline	I	Pump B is having too high pressure

Icons

These icons appear on the Events tab.

Icon	Description
	Click Delete icon to delete an existing task.
	Indicates that the original event has been changed.

Manage attachments for experience transfers

The **Attachments** tab contains of list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.

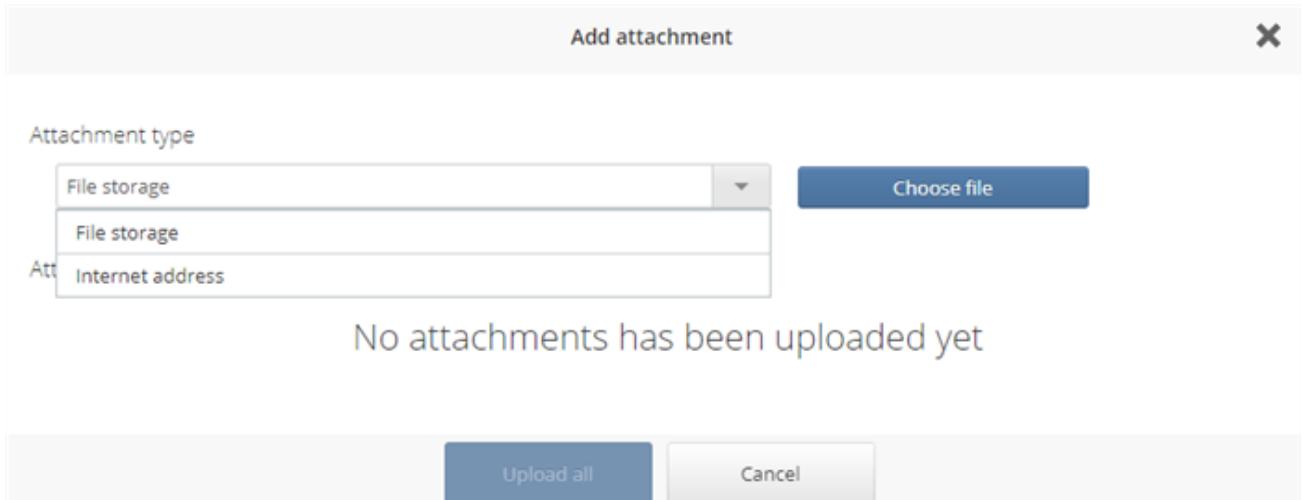
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

Add an attachment

- Select the **Add** icon to add a new attachment.
- On the Add attachment dialog box, select either *File storage* or *Internet address*.
- If you are adding a file, select **Choose file**.



- If you are adding a URL, enter the URL, and click **Add web link**.

Add attachment X

Attachment type

Internet address ▼ Add web link

Enter URL

Attachments ready to be uploaded
No attachments has been uploaded yet

Upload all Cancel

5. When you have finished adding files or URLs, click **Upload all**.

FORM	PLOT LOCATION	REFERENCES (2)	ATTACHMENTS (3)	SIGNATURES	LOGS																				
			+																						
			<table><thead><tr><th>FILE NAME</th><th>DESCRIPTION</th><th>ADDED BY</th><th>ADDED</th><th></th></tr></thead><tbody><tr><td>Attachment 1.pdf</td><td>Attachment 1</td><td>View Details</td><td>08/18/22</td><td>Edit Delete</td></tr><tr><td>Attachment 2.pdf</td><td>Attachment 2</td><td>View Details</td><td>08/18/22</td><td>Edit Delete</td></tr><tr><td>www.weatherstation.org.nz</td><td></td><td>View Details</td><td>08/22/22</td><td>Edit Delete</td></tr></tbody></table>	FILE NAME	DESCRIPTION	ADDED BY	ADDED		Attachment 1.pdf	Attachment 1	View Details	08/18/22	Edit Delete	Attachment 2.pdf	Attachment 2	View Details	08/18/22	Edit Delete	www.weatherstation.org.nz		View Details	08/22/22	Edit Delete		
FILE NAME	DESCRIPTION	ADDED BY	ADDED																						
Attachment 1.pdf	Attachment 1	View Details	08/18/22	Edit Delete																					
Attachment 2.pdf	Attachment 2	View Details	08/18/22	Edit Delete																					
www.weatherstation.org.nz		View Details	08/22/22	Edit Delete																					

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.

Icon	Description
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

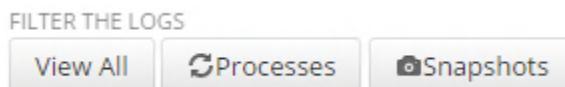
View Logs for experience transfers

Logs tab

The **Logs** tab contains a list of changes. This also includes process changes and snapshots .

Switch Log filter

- On the **Logs** tab, click **View All**, **Processes**, or **Snapshots** to change the filter.



A screenshot of the "LOGS" tab interface. At the top, there's a "LOGS" tab and a "FILTER" section with buttons for "View all", "Processes", and "Snapshots". Below is a table with the following data:

DATE	PERFORM...	PROCESS	PREVIOUS STATUS	NEW STATUS	ROLE	ATTENTION	DESCRIPTION
30/01/18 15:03		System Admi...					
30/01/18 15:03		System Admi... Approve	150 - For approval	200 - Approved			
30/01/18 15:03		System Admi...					
30/01/18 15:03		System Admi... Send for approval	100 - New	150 - For approval			
30/01/18 14:54		System Admi...					

At the bottom right, there are navigation buttons for "PAGE 1 OF 1" and arrows.

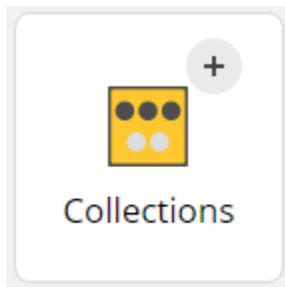
Icons

These icons appear on the Logs tab.

Icon	Description
	A process change that moves the item from one status to another status in the workflow.
	A snapshot of data at a specific time.

Collections

This section contains topics that relate to collections.



Collections Library

The **Collections** module supports adding work permits to a collection when the permits have a relationship to each other.

For example, the work permits relate to a specific job and the work should be performed in a certain order:

- Sequentially, and/or
- One at a time

The main functionality is to add dependencies between the entities.

If it is necessary to run several work permits in parallel with their own dependencies, then you can create several collections.

Collections

A Collection of Work Permits

1	Work Permit WP-40082	ACTIVE
2	Work Permit WP-42080	ACTIVE
3	Work Permit WP-40002	ACTIVE
4	Work Permit WP-46803	ACTIVE
5	Work Permit WP-40004	ACTIVE
6	Work Permit WP-40005	ACTIVE

Only one Work Permit can be in Active status at a time

Collection groups

A collection can consist of several collection groups. A group (of work permits) in a collection will have a set of properties. The properties can be configured per group and a collection can only have one group of the same type. For example, a collection cannot have two groups with work permits.

A collection group can contain only objects of same entity. For example, work permits can not be in same group as work orders. A group is the same as a section in the [References](#) page of work permit.

Library tabs

The Collections library page has the following tabs:

- [Browse All](#) - The **Browse All** tab lists all the collections for particular location.
- [My Work](#) - The **My Work** tab shows only those collections for a particular location that are added to current user's My Work.

The screenshot shows the Collections library page with the following interface elements:

- Header:** A yellow icon with three dots and the word "Collections".
- Toolbar:** Buttons for "BROWSE ALL (1)" and "MY WORK (1)".
- Table Headers:** STATUS, NUMBER ▾, TITLE, DESCRIPTION, RESPONSIBLE, VALID FROM, VALID TO, and a small gear icon.
- Table Data:**

STATUS	NUMBER	TITLE	DESCRIPTION	RESPONSIBLE	VALID FROM	VALID TO
New	CL-0000041	New Collection			21/08/2019	23/08/2019
- Page Navigation:** Buttons for "PAGE 1 OF 1" and icons for search, refresh, and print.

Browse all collections

The **Browse All** tab displays all the collections in the Collection library for this location.

View details of a collection

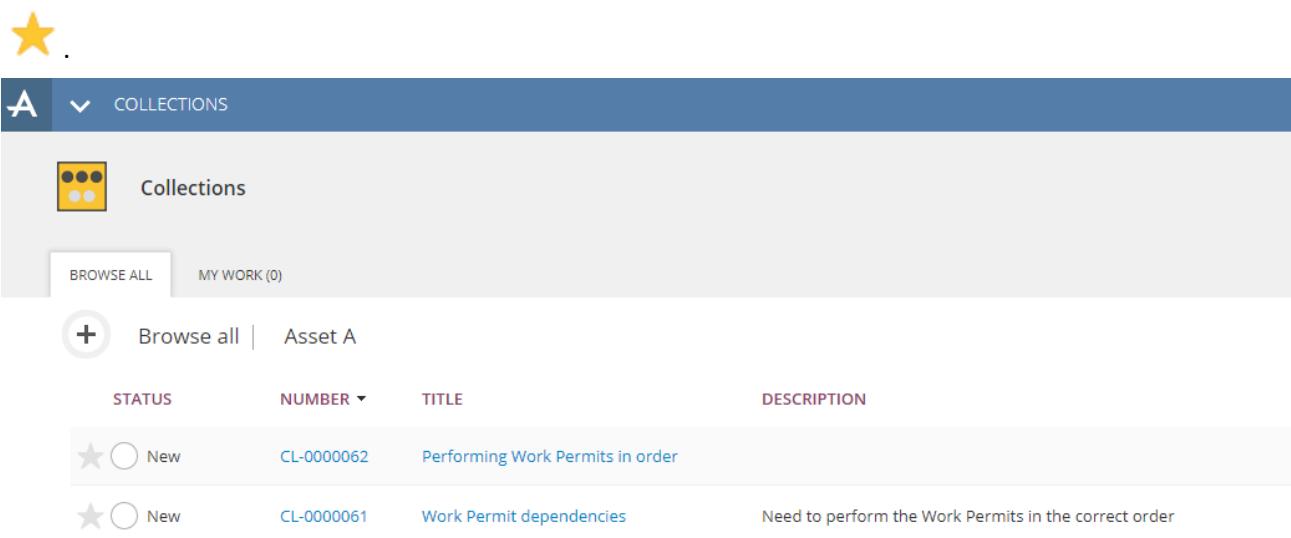
- Click any row to view the [details tabs](#) of that collection.

Create a new collection

- Click the **Add**  icon to create new entity.

Add a collection to My Work

- Click the **Star** icon  to add the collection to [My Work](#). When an item is selected, the star turns yellow



STATUS	NUMBER	TITLE	DESCRIPTION
 New	CL-0000062	Performing Work Permits in order	
 New	CL-0000061	Work Permit dependencies	Need to perform the Work Permits in the correct order

Library icons

These icons appear on the Library page.

Icon	Name	Description
	My Work icon	Click the star icon to add the item to My Work .
	Signature icon	Indicates whether the item is in signing process. If signatures are complete, the icon is green.
	Status icon	Indicates the current status of the item.

Icon	Name	Description
	Process Workflow icon	Click the Workflow icon to show all the available processes for the current item.

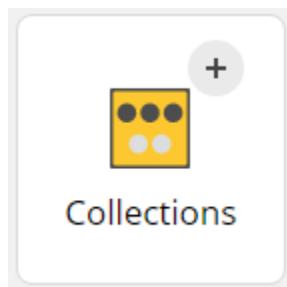
Work with collections

- [Create a collection](#)
- [Fill out Collection fields](#)
- [Add a new work permit to collection](#)
- [Set Work Permit Options](#)
- [Reorder work permits](#)

Create a collection

Create a new collection

You can create a new collection from the [OSM Home page](#) or from the library page.



The [Browse All](#) tab contains all collections. Initially, there are no collections.

Create from Library page

1. On the Collections Library page, click the **Add**  button to create a new collection.

STATUS	NUMBER	TITLE	DESCRIPTION	RESPONSIBLE	VALID FROM	VALID TO
  New	CL-0000041	New Collection			21/08/2019	23/08/2019

The Create Collection dialog box appears.

2. Enter the details and click **Create Collection**.

The screenshot shows the 'Create collection' dialog box. At the top, it says 'Create collection'. Below that, there are several input fields: 'Title *' with 'Collection' entered, 'Number' with '[To be generated]', 'Description' with 'Description of Collection', 'Asset *' with 'SWS - AVEVA Demo Site', 'Responsible' with 'System Administrator', 'Valid from' with '26/08/19' and 'Valid to' with '30/08/19'. At the bottom, there are three buttons: 'Create another' (unchecked), 'Create collection' (highlighted in blue), and 'Cancel'.

Next step [View work permits in collection](#)

Fill out Collection fields

These are the fields for a collection item. Fields with an asterisk are required.

Field	Description
• <i>Title*</i>	The title of the supplementary form. This field is required.
• <i>Number</i>	The number will be auto-generated.
• <i>Description</i>	A description of the collection.
• <i>Site*</i>	The site where the collection will be used. This field is required.
• <i>Responsible</i>	The name of the person creating the collection. Select from the drop-down list, or click Swap to free text to enter a name.

Field	Description
• <i>Valid from</i>	A start date that the collection will be valid.
• <i>Valid to</i>	An end date that the collection will be valid.

Create collection

Title * Number

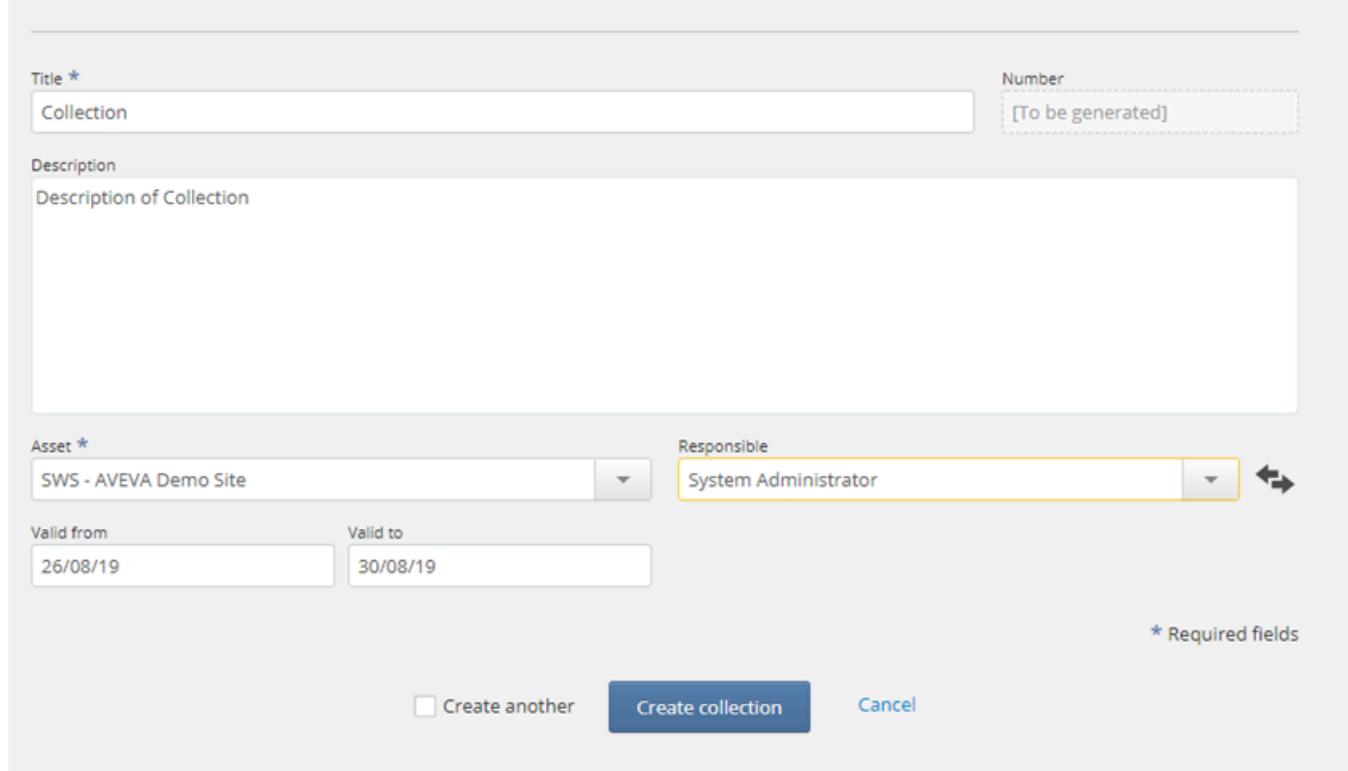
Description

Asset * Responsible

Valid from Valid to

* Required fields

Create another Cancel



Add a new work permit to collection

Add a new work permit to collection

- Click the Add  button to add a new work permit.

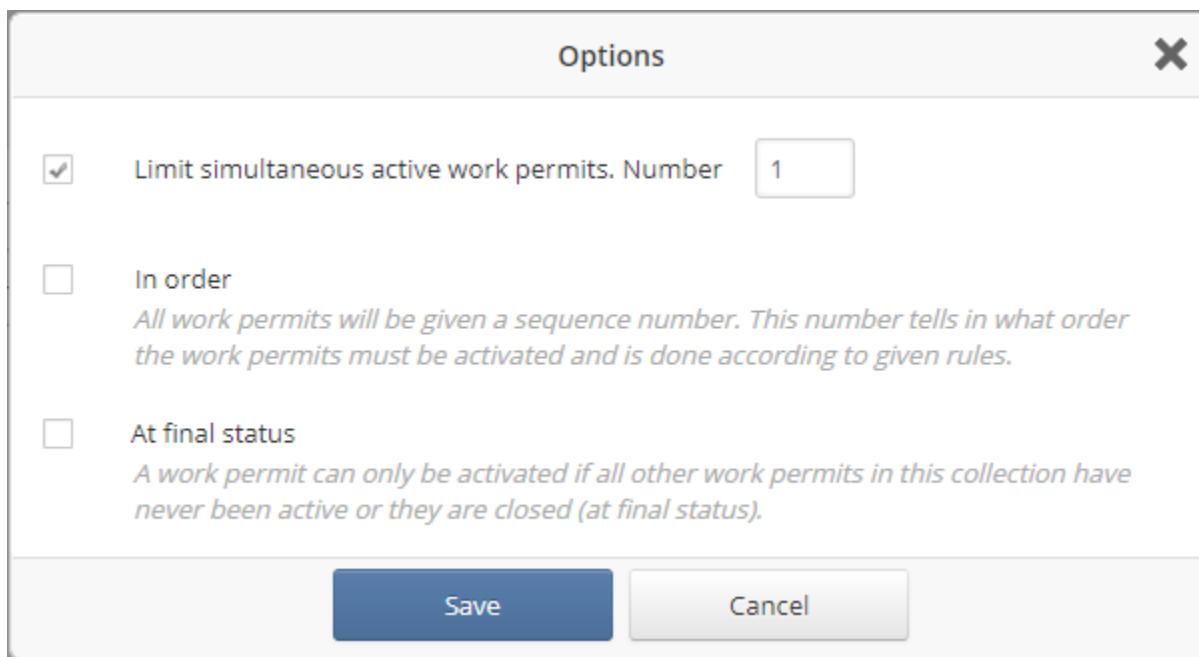
#	STATUS	NUMBER	TITLE	TY	ST	DI	VALID FROM	VALID TO
4	New	WOP-732502	Lifeboats	L1STD			26-02-2016 07:00	26-02-2016 19:00
1	For approval	WOP-732494	Work on cranes	L1STD	01HA		22-12-2016 07:00	22-12-2016 19:00
3	New	WOP-732084	Welding	L1STD			02-11-2015 07:00	02-11-2015 19:00
2	New	WOP-730123	Work in height	L1STD			05-12-2014 07:00	05-12-2014 19:00

PAGE 1 OF 1

Set Work Permit Options

Set work permit options

- Click the Options icon in the upper-right corner of the work permit section.



- Make selections by selecting the checkboxes.

- Limit simultaneous active work permits**

When a work permit is added to a collection, the default rule *Limit simultaneous active work permits* is set 1.

- In order**

Select the **In order** checkbox to assign a sequence for work permits to be activated.

- **At final status**

Select the **At final status** checkbox to specify that work permit can only be active if all other work permits in the collection are not active.

3. Click **Save**.

STATUS	NUMBER	TITLE	TY	ST	DI	VALID FROM	VALID TO
L New	WP-0000341	Work permit	L1	03EN		28-08-2019 07:00	28-08-2019 19:00

Reorder work permits

You can reorder work permits when the **In Order** group option is selected.

Guidelines

You cannot reorder work permits when:

- They are in status defined as *Active Collection*.
- They are in *Closed* status.

Reorder work permits

1. Click the **Re-order** button in the upper-right corner of the work permit section.
2. Drag and drop the work permits to change order.

The dialog box has a header "Re-order" with a close button "X". Below it is a title "Work Permits (4)". There are four items listed:

- 1 WOP-732494
- 2 WOP-730123
- 3 WOP-732084
- 4 WOP-732502

At the bottom are two buttons: "Apply" and "Cancel".



For approval

Unsortable items

- Unsortable items are disabled in the Re-order window.
- To find the items that should be disabled, start from the bottom and check if the status is in *Active Collection* or is *Closed*. If so, this and everything above should be disabled.

Details for a collection

Details tabs for collections

Each collection has several tabs containing the details about the collection.

Open a collection

- Double-click a collection in the [Collections Library](#).

collection tabs



<ul style="list-style-type: none">• References	Contains a list of items referenced by this collection.
<ul style="list-style-type: none">• Attachments	Add attachments to the collection.
<ul style="list-style-type: none">• Logs	View logs for the collection.

View work permits in collection

References tab

The **References** tab of collections contains a work permit section. Initially, no work permits are added in this section.

Information header

The [Information header](#) across the top of the screen provides details about the form and action buttons.

Search for existing work permits

You can search for existing work permits or add new work permits.

081								
Number	Status	Title	Description	Type	Area	Discipline	Created by	OM
WP-0000081	Fo...	Repair defec...	Hydrant valv...	L1	Pr...	Op...	System Admin...	OM

NO WORK PERMITS FOUND

Icons

These icons appear on the References tab.

Icon	Description
	Click Add icon to add a new work permit.
	Click Delete icon to delete an existing work permit.
	Click Re-order
	Click Options

Manage attachments for collection

The **Attachments** tab contains of list of attached files and websites. The Attachments feature is generally used for adding images, drawings, and other file types.

Individual log entries for attachments

Each time an attachment is added to or deleted from a work item, an individual log entry is created.

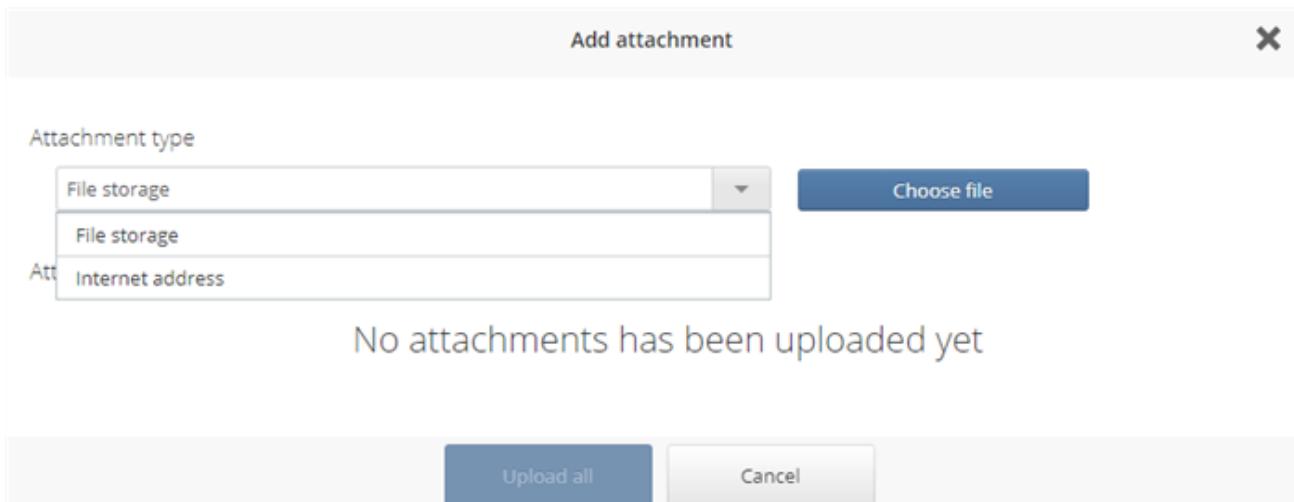
- This only applies if work item is in a read-only status.
- Each log entry will have the name (filename/url) of the attachment.
- When a work item is in an ending status (Closed, Cancelled), then no log entry will be added—because an attachment can never be added or deleted in an ending status.

Guidelines for adding files and URLs as attachments

- You can add files or URLs as attachments.
- You can add any supported file type, but only PDFs can be printed from the **Print** option.
- You can add multiple attachments of different types, and then upload all at one time.
- All file types can be downloaded.
- MSI and EXE file types are not supported.

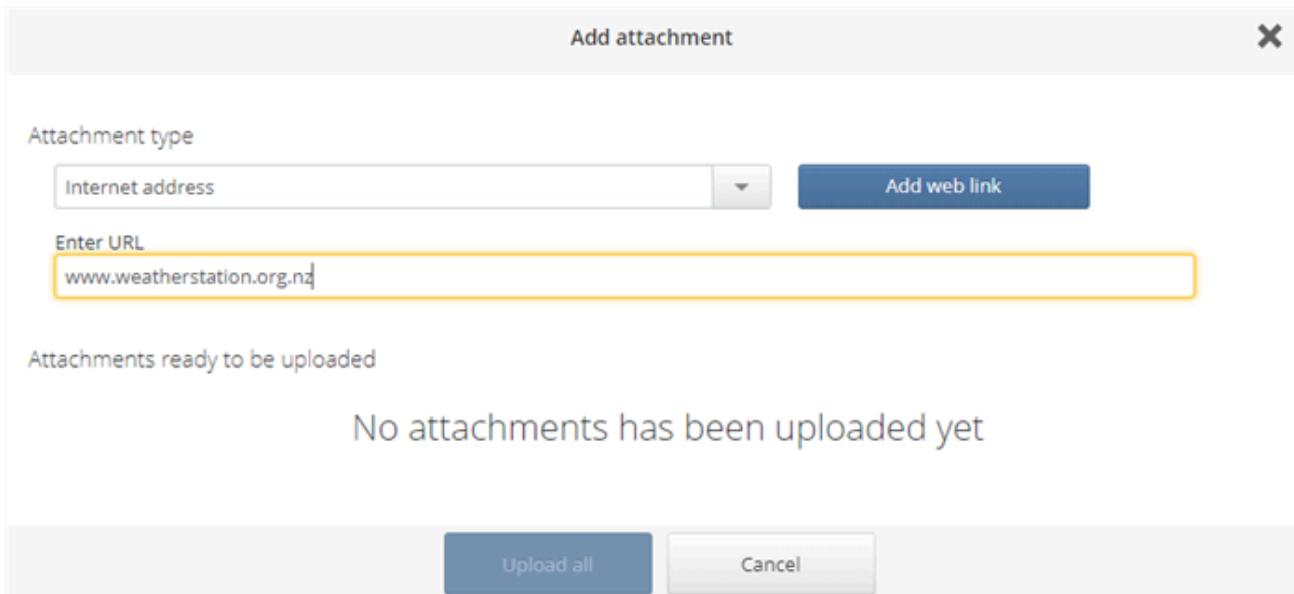
Add an attachment

1. Select the  icon to add a new attachment.
2. On the Add attachment dialog box, select either *File storage* or *Internet address*.
3. If you are adding a file, select **Choose file**.



The screenshot shows the 'Add attachment' dialog box. At the top, it says 'Add attachment' and has a close button. Below that is a section labeled 'Attachment type' with a dropdown menu. The 'File storage' option is selected. To the right of the dropdown is a blue 'Choose file' button. Below the dropdown, there are two other options: 'File storage' and 'Internet address'. A message at the bottom states 'No attachments has been uploaded yet'. At the bottom of the dialog are 'Upload all' and 'Cancel' buttons.

4. If you are adding a URL, enter the URL, and click **Add web link**.



The screenshot shows the 'Add attachment' dialog box for adding a URL. At the top, it says 'Add attachment' and has a close button. Below that is a section labeled 'Attachment type' with a dropdown menu. The 'Internet address' option is selected. To the right of the dropdown is a blue 'Add web link' button. Below the dropdown, there is a text input field labeled 'Enter URL' containing 'www.weatherstation.org.nz'. A message at the bottom states 'Attachments ready to be uploaded' and 'No attachments has been uploaded yet'. At the bottom of the dialog are 'Upload all' and 'Cancel' buttons.

5. When you have finished adding files or URLs, click **Upload all**.

FILE NAME	DESCRIPTION	ADDED BY	ADDED	
Attachment 1.pdf	Attachment 1	George Brown	08/18/22	
Attachment 2.pdf	Attachment 2	George Brown	08/18/22	
www.weatherstation.org.nz		George Brown	08/22/22	

Icons

These icons appear on the Attachments tab.

Icon	Description
	Click the Add icon to add a new attachment.
	Click to Open the URL in a browser window.
	Click to Download a file attachment.
	If this red icon displays, hover over the tooltip to see the message. Click red icon to remove. <ul style="list-style-type: none"> • File size is exceeded • File type is not supported
	Click the Delete icon to delete an existing attachment.

View logs for collection

Logs tab

The **Logs** tab contains a history of changes that have been made to the item. The log includes process changes



and snapshots



- **Process change.** A process change occurs when the item moves from one status to another status in the workflow.
- **Snapshot of data.** If configured, a snapshot of the data is recorded when a workflow process occurs. Snapshots are recorded so you can look back at data from an earlier time in the workflow. For example, a snapshot that was taken at the time an item was Approved.
- **Snapshot of form.** A snapshot of the form with manually entered data at a specific time.

Switch Log filter

- On the **Logs** tab, click **View All**, **Processes**, or **Snapshots** to change the filter.

FILTER THE LOGS

View All **Processes** **Snapshots**

FORM	REFERENCES (3)	ATTACHMENTS (0)	SIGNATURES	LOGS
FILTER				
View all	Processes	Snapshots		
DATE	PERFORMED BY	PROCESS	PREVIOUS STATUS	NEW STATUS
20/05/20 03:09		Approve	100 - New	200 - Approved
20/05/20 03:09			-	-
20/05/20 03:09			-	-
16/04/20 12:32			-	-
◀ PAGE 1 OF 1 ▶				

Icons

These icons appear on the Logs tab.

Icon	Description
↻	A process change that moved the item from one status to another in the workflow process.
📷	Data snapshot - View a snapshot of unformatted data at a specific time.

Icon	Description
	Form snapshot - View a snapshot of the form with data at a specific time.

Glossary

This glossary provides a list terms and definitions that may appear in AVEVA™ Operational Safety Management.

Access Groups

An *access group* (formerly called user group) is a category of OSM users that share the same access permissions in AVEVA Operational Safety Management. A single user can belong to many different access groups.

Area

An *area* is a designated physical area within a site. A site usually contains multiple areas.

Asset (now Site)

Previously in AVEVA™ Operational Safety Management, an *Asset* referred to a physical site location, such as plant, site, location. This is now called a Site.

Attachment classes

Attachment classes are file types that can be added as attachments to entities, such as files and URLs.

AVEVA™ AIM (formerly AVEVA NET)

The AVEVA™ Asset Information Management (AIM) cloud-based service is a solution for managing, accessing, visualizing, and comparing technical data and documents from multiple sources. AIM provides a centralized interface for full visualization of an entire digital asset collection associated with an industrial site—including schematics, P&IDs, object attributes, 3D models, and isometrics. Behind the scenes, the AIM service transforms this data from multiple information systems into trusted resources for use in other software projects, while delivering operational safety, asset

information integrity, and reduced risk on data.

AVEVA™ Engage

AVEVA Engage is an interactive touch-driven mobile application for digital assets.

AVEVA™ NET Gateway

AVEVA NET Gateway enables enterprise-wide access to engineering, design, project, or business data.

AVEVA™ Workflow Management

AVEVA Workflow Management is an advanced workflow management system software.

Collection

A Collection contains one or more collection groups of work permits. Each group of work permits in a Collection will have a set of properties.

Competency

A Competency is a specific licensed skill or qualification that is necessary to do a job.

Discipline

A Discipline is a category of workers who work in the same professional area. For example, operators, control room, or project managers.

EAM system

An Enterprise Asset Management system handles the management and maintenance of physical assets of an organization throughout each asset's lifecycle.

EIWM

Enterprise Information and Workflow Model (EIWM) format is an AVEVA format for defining data

used in XML Schema.

Entity

An entity in AVEVA™ Operational Safety Management refers to a class of items, such as work permits, work orders, isolation plans, or isolation lists. One instance of an entity refers to one work permit. Some entities can have a workflow with statuses and processes.

Experience Transfer

An Experience Transfer is a set of events from a shift category that happened within a certain time period. A supervisor can select a subset of events to include in an Experience Transfer. Multiple subsets can be selected from the same shift category with different time queries.

External SAC

An *External Security Access Control (SAC)* solution is one that is provided by a third-party software. In Operational Safety Management, this security function can be provided with an integration to NetNordic SHIELD.

Functional Location

A *Functional Location* is an SAP term that is the same as *Tag* in Operational Safety Management.

Isolation List

An Isolation List is a predetermined set of sequential steps that must be followed to isolate a system that will be worked on. An Isolation List must be part of an Isolation Plan.

Isolation Plan

An isolation plan is a work plan to ensure that a certain piece of equipment has been isolated from other systems.

For example, an item of equipment has both water input and electricity input. Both of these systems need to be turned off before any work can be performed on the equipment.

An isolation plan usually contains one or more isolation lists of different types, such as an electrical isolation list to turn off the electricity and then turn it back on after work on the equipment is

complete.

Isolation Point

An *isolation point* is a physical point in the schematic where action occurs, such as disconnection points. For example, a cable has two disconnection points: The end that connects to power and the end that connects to the equipment.

Lesson Learned

A Lesson Learned is a piece of experience or knowledge that has been acquired while doing work.

Life Cycle

Life cycle refers to series of changes that an entity moves through from the beginning of the workflow to the last status.

P&ID

A piping and instrumentation diagram (P&ID) is a detailed diagram that shows piping and process equipment in instrumentation and control devices. P&IDs are used by Isolation Lists.

Plot plan

A plot plan is an architecture or engineering plan drawing that typically shows buildings, utilities, and equipment layout of a site. Plot plans are also known as site plans. Plot plans are used by Work Permits to show a plotted point for all Work Permits in an area.

Progvalue

Progvalues (short for programming value) in AVEVA™ Operational Safety Management describe a specific behavior, depending on status of entity. They are used to configure entity behavior.

QR Code

A QR Code is a certain type of matrix barcode or two-dimensional barcode. A barcode is a machine-

readable optical label that contains information about the item to which it is attached.

Risk Assessment

A Risk Assessment is the result of breaking down a job into individual tasks and analyzing the risk of each individual task. A calculation is made for the overall risk assessment of the entire job.

SAC

Security Access Control (SAC) is a security technique that regulates who can view or use resources in a computing environment. It is a fundamental concept in security that minimizes risk to the business or organization.

- Internal SAC - An example of internal SAC is user group permissions.
- External SAC - An example of an external SAC is AVEVA Avantis or NetNordic SHIELD.

Safe Job Analysis

A Safe Job Analysis (SJA) is a procedure that integrates accepted safety practices into a particular task or job operation.

SAP

SAP is a software developed by the German company SAP SE. AVEVA™ Operational Safety Management can integrate against SAP as a source of work orders.

SHIELD

NetNordic SHIELD is a third-party software that provides Security Access Control (SAC) to work permits that need authorization.

Shift Handover

Shift Handover is the process of handing over a shift to the next shift of workers and communicating

all relevant information.

Site

A *Site* in AVEVA™ Operational Safety Management refers to a physical site location, such as plant, site, location. This was formerly called Asset.

SSL

Secure Sockets Layer (SSL) is a cryptographic protocol designed to provide communications security over a computer network.

SSO

Single sign-on (SSO) is an access control feature of multiple related, yet independent, software systems. With this feature, a user can log in with a single ID and password to gain access to any of several related systems.

Status

In AVEVA™ Operational Safety Management, an entity moves through the workflow from one status to another. The dynamic workflow is made up statuses and workflow actions.

Supplementary form

A *Supplementary Form* is custom form that is created in HTML5 format and uploaded to Operational Safety Management—so that you can use the unique forms that your business requires inside AVEVA™ Operational Safety Management.

System

A *system* is made up of similar parts that form an interconnected network that reaches across physical areas in a site. For example, the electrical system or the plumbing system.

Tags

The term *tag* in AVEVA™ Operational Safety Management represents a unique name to identify an equipment part.

Tags use a naming convention, such as *21FO6335* or *PS-U20-0429*.

In an EAM system, a tag can be called an asset or functional location.

User Groups

A *User Group* (now called Access Groups) is a category of OSM users that share the same access permissions in AVEVA Operational Safety Management. A single user can belong to many different user groups.

Workflow

The dynamic *workflow* in AVEVA™ Operational Safety Management is a defined process flow that is made up Statuses and Processes.

Workflow action

A workflow action is an operation that moves an entity from one status to another. The dynamic workflow is made up statuses and actions.

Work order

A Work Order is a description for a piece of work. All work orders that come into the AVEVA™ Operational Safety Management system are created in another system, such as SAP or IBM Maximo. Work Orders inside Operational Safety Management are read-only, but you can attach other entities.

Work permit

A *Work Permit* is a document that gives a worker the permission to carry out a job within a specific time frame. Work Permits are needed to perform a restricted activity, such as entering a restricted area, or using a restricted piece of equipment. There can be many types of Work Permits.

XML

Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding

documents in a format that is both human-readable and machine-readable.

Zone

A *zone* is a designated logical area in a site.

OSM Mobile App Guide

Introduction

With **Operational Safety Management Mobile 3.0**, you can access the same work permit and isolation list information that exists in the OSM web application from your mobile device.

Work permits

- Search for and look at details of a work permit.
- Add work permits to your My work list.
- Process the workflow of a work permit.
- Add and view attachments.

Isolation lists

- Search for and look at details of an isolation list.
- Add isolation lists to your My work list.
- Process the workflow of an isolation list.
- Add and view attachments.
- Work with isolation points.

OSM Mobile 3.0

Introduction

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- Add isolation lists to your My work list.
- Process the workflow of an isolation list.
- Add and view attachments.

- Work with isolation points.

Mobile requirements

Mobile device requirements

With Operational Safety Management Mobile 3.0, you can access the same work permit and isolation list information that exists in the OSM web application from your mobile device.

A mobile device connected to OSM 11.2.3 will require:

- Android 13 operating system or later
- Operational Safety Management Mobile 3.0
- Ability to connect to corporate network where OSM 11.2.3 resides

Install the app onto device

Download Android app **Operational Safety Management Mobile 3.0** from Google Play.

Signing in to mobile app

The first time you open the mobile app, the **Sign in** page displays. However, it is not yet enabled for you to sign in.

Define an environment

First, you need to define a personal mobile environment.

- [Add environment](#)



AVEVA™
Operational Safety
Management

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Environment

Add environment >

[Sign in](#)

Sign in

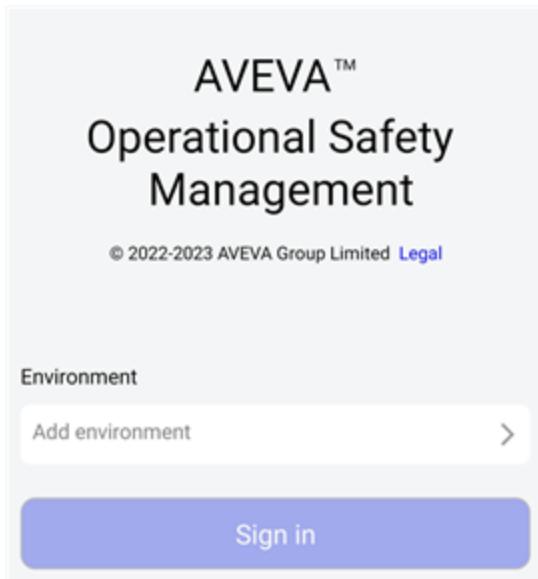
When you have an environment defined, proceed to [Sign in page](#).

Add environment

Before you can sign in, there must be at least one defined environment. This is a personal environment as you define it for yourself, with your chosen name for the environment.

Add a personal environment

1. On the **Sign in** page, tap **Add environment**.



2. Tap the **Add (+)** button.



The **Add environment** page opens.

The screenshot shows the 'Add environment' screen of the AVEVA OSM mobile application. It includes the following fields:

- Environment:** New Zealand WF South Production
- Authentication service:** https://pcs_server_name.company.com/identitymana
- Authentication key:** osmclientmobiledevelop
- OSM Web:** https://osm_domain_name.company.com/prod

A large blue 'Save' button is located at the bottom of the screen.

3. Use **Scan** to enter values, or tap each parameter to manually enter a value.

Scan option. You can scan a QR code to fill in the environmental values. The QR code will be provided by your system administrator. You can still personalize your environment name.

Manual entry. If you want to enter the values manually, type in the environmental values supplied by your system administrator.

- **Environment**

Enter any name for your personal environment. This is a nickname for your environment, such as Production or Testing. The name allows spaces and characters.

- **Authentication service**

Enter the URL for the AVEVA authentication service. This is the full URL for the registered PCS mobile client (known as the HostBase) with /IdentityManager appended to URL.

For example: https://pcs_server_name.company.com/IdentityManager

- **Authentication key**

Enter the Id for the registered PCS mobile client, such as *osmclientmobileprod*.

- **OSM Web**

Enter the full URL of the OSM web application.

For example: <https://servername.domain.com/prod>

Regardless of whether entered manually or by scanning, the OSM web application URL will be validated before you can continue.

4. Click **Save** to add new environment.

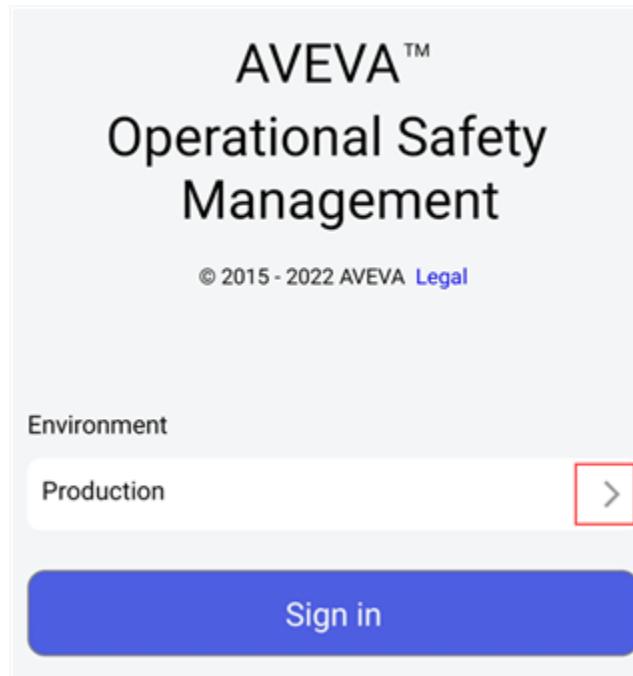
Returns to main screen.

Select an environment

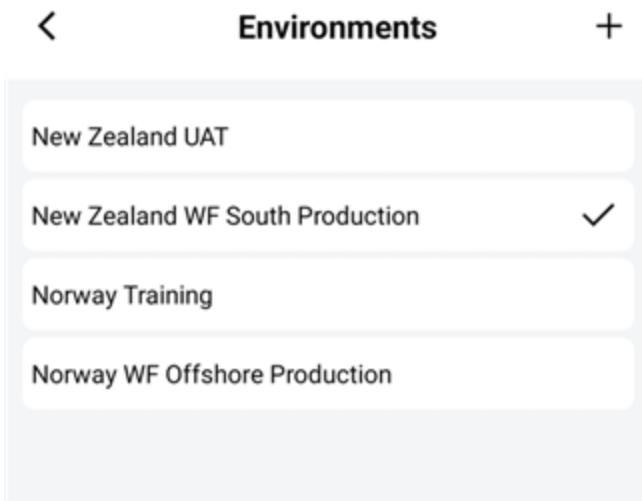
If there is more than one defined environment, you will need to choose which environment to use. The currently selected environment displays a check mark.

Select an environment

1. On the **Sign in** page, tap the arrow next to **Environment**.



2. On the **Environments** page, tap an environment to select.



Examples of environments

You might have different environment to represent production, testing, or training environments.

- NZ Production
- NZ UAT
- Norway Production
- Norway Training

Sign in page

When the **Sign in** page shows an environment selected, you are able to Sign in.

AVEVA™ Operational Safety Management mobile app uses AVEVA™ Identity Manager for authentication, which requires you to enter the same Windows credentials that you use to sign in to the OSM web application.

Sign in to mobile app

1. Tap **Sign in**.



AVEVA™ Operational Safety Management

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Environment

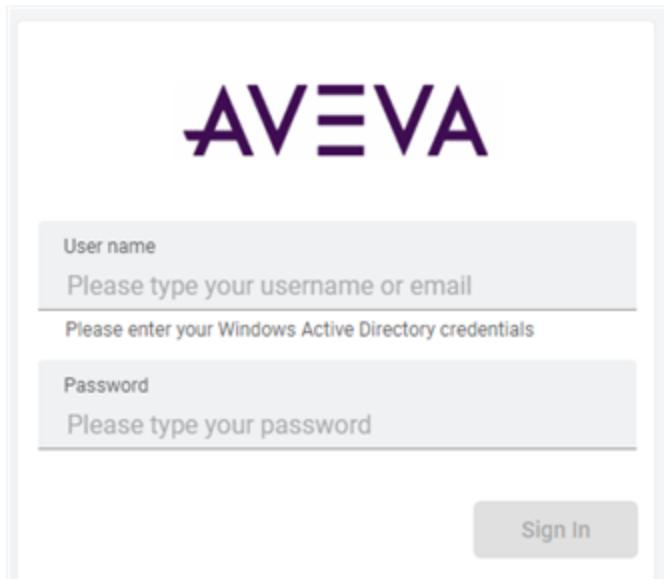
Production >

Sign in

The default browser on your device opens to AVEVA™ Identity Manager.

2. Enter the credentials for your Windows Active Directory account.
 - **User name**—Enter your Windows AD user name in the format *domain\username* or email address.
 - **Password**—Enter your Windows AD domain password.

Note: The Windows Integrated Login feature is not available in the mobile application.



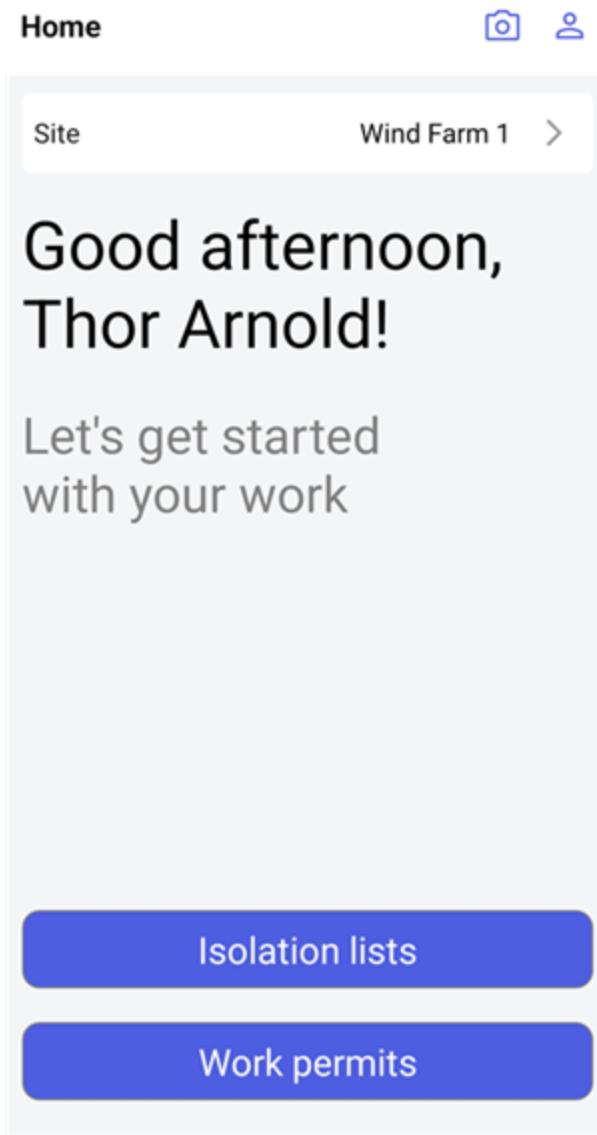
3. Tap **Sign in**.

Home page

When you are successfully signed in, your personal home page displays.

Actions on this page

- [Scan](#)—Opens the scan page to scan a work permit QR code or scan an isolation point label.
- [User profile settings](#)—Opens your user profile page.
- [Site](#)—Select a site. The selected site becomes the default site on mobile app and web application.
- [Work permits](#)—Opens list of work permits. This feature depends on your OSM licensed features.
- [Isolation lists](#)—Opens list of isolation lists. This feature depends on your OSM licensed features.



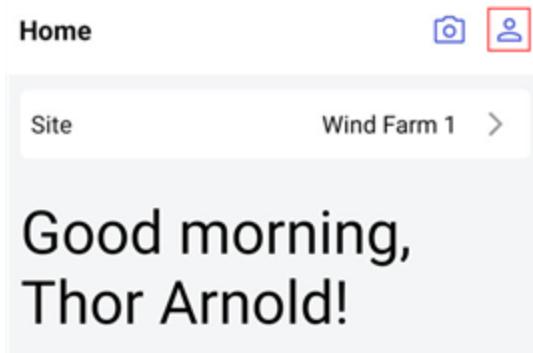
User profile settings

The **User profile** icon gives access to the following settings:

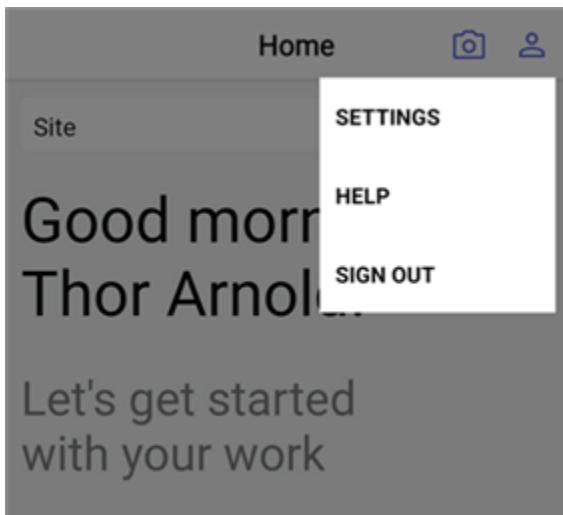
- Settings
- Help
- Sign out

Edit your user profile settings

1. Tap your **User profile** icon.



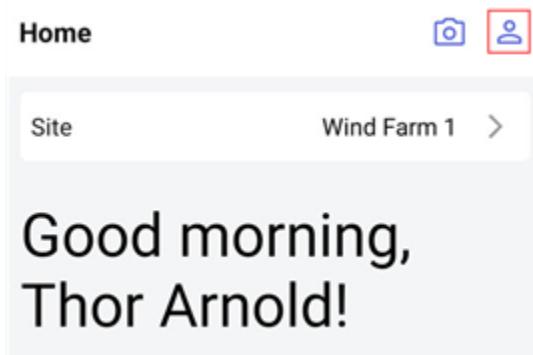
2. Tap **Settings** on the pop-up menu.



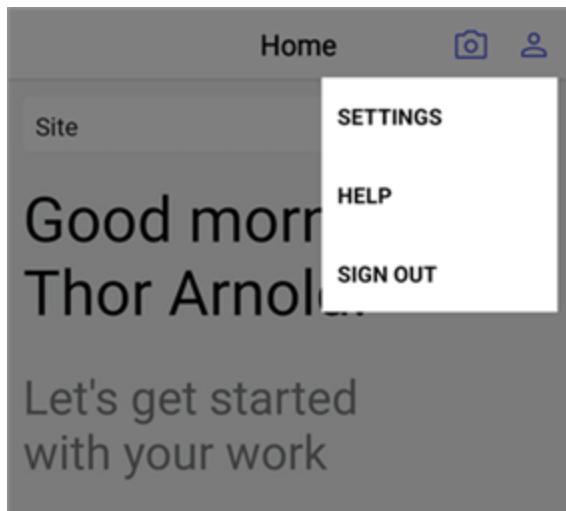
3. Choose your preferred language and site. The select site becomes the default site on mobile app and web application.

Access OSM Help

1. Tap your **User profile** icon.



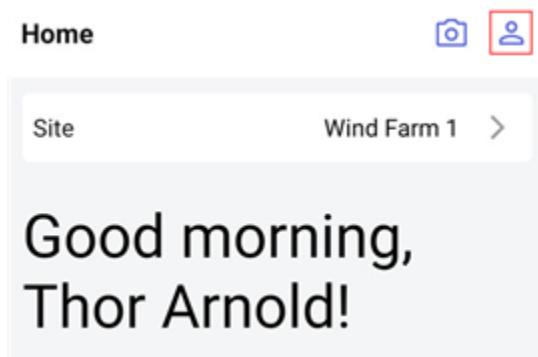
2. Tap **Help** on the pop-up menu.



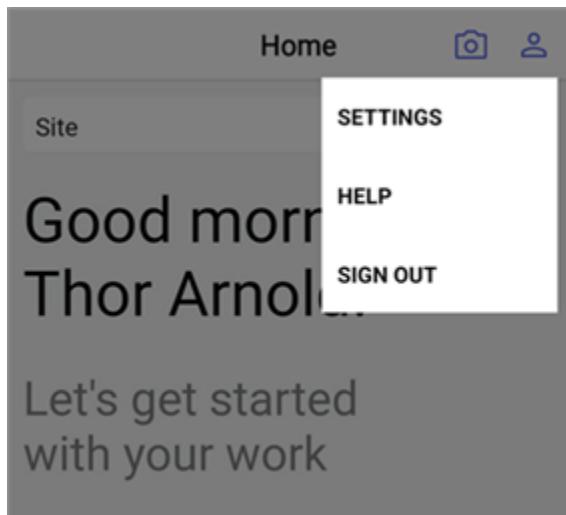
OSM documentation opens in a browser.

Sign out of mobile app

1. Tap your **User profile** icon.



2. Tap **Sign out** on the pop-up menu.



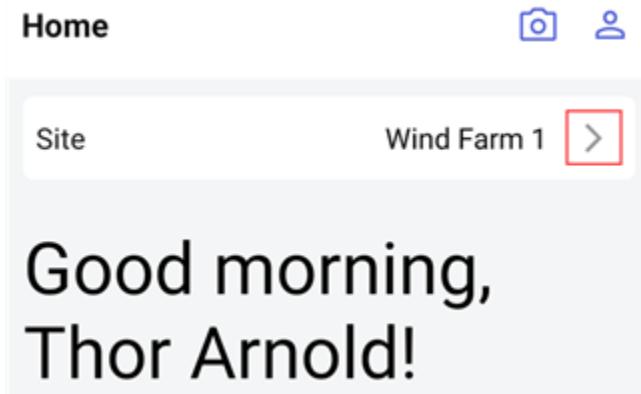
You are signed out of OSM mobile app.

Select Site

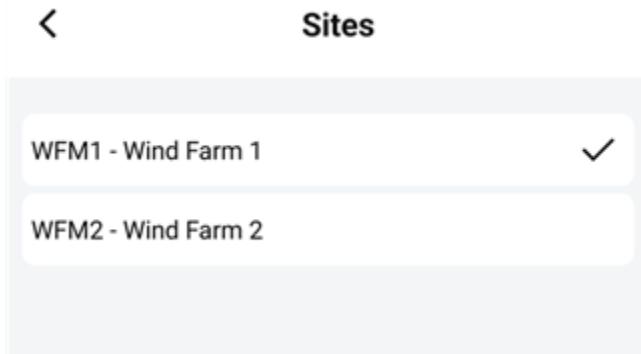
If there is more than one site, you will need to choose site to use. The currently selected site displays a check mark.

Select a site

1. On the **Sign in** page, tap the arrow next to **Environment**.



2. On the **Site** page, tap a site to select.



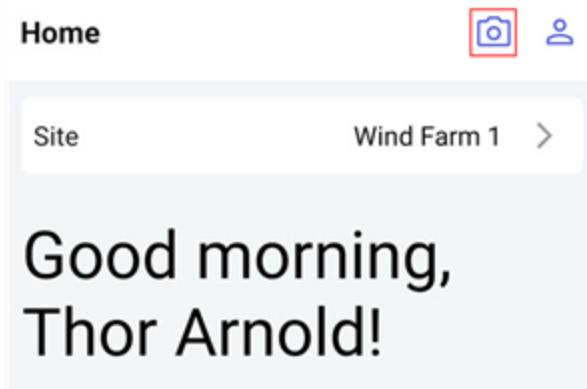
Access to camera

Use your device camera to scan a QR code to open a work permit or scan a QR code to open an isolation point (in an isolation list).

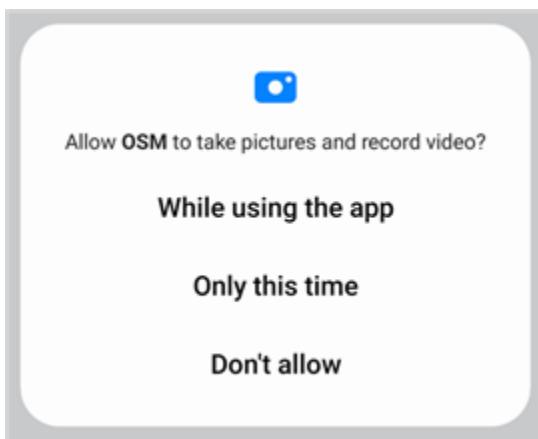
The first time you open the camera, you will need to grant permission to the app. The exact wording of options will depend on your device.

Give permission to access camera on device

1. On your Home page, tap the **Scan** icon.



A pop-up dialog displays that asks if you **Allow OSM to take pictures and record video?**



2. Tap your selection.
 - **While using app**—If you select **While using the app**, you will only need to grant access to device camera one time. This selection will allow always.
 - **Only this time**—If you select **Only this time**, you will need to grant access again next time you open the camera.
 - **Don't allow**—If you select **Don't allow**, the dialog closes and you cannot use the camera.
3. Proceed to [Scan QR code with camera](#).

Scan QR code with camera

Use your device camera to scan a QR code and directly open a work permit, or scan a QR code to directly open an isolation point. This provides easy access to open a work item.

- [Scan QR code for work permit](#)
- [Scan QR code for isolation point label](#)

Scanning

You can print a QR code to either paper or on screen.

Turn on or off flash

If there is not enough light to read the QR code, turn on the flash on your device.



[Turn on/off](#)

Details page

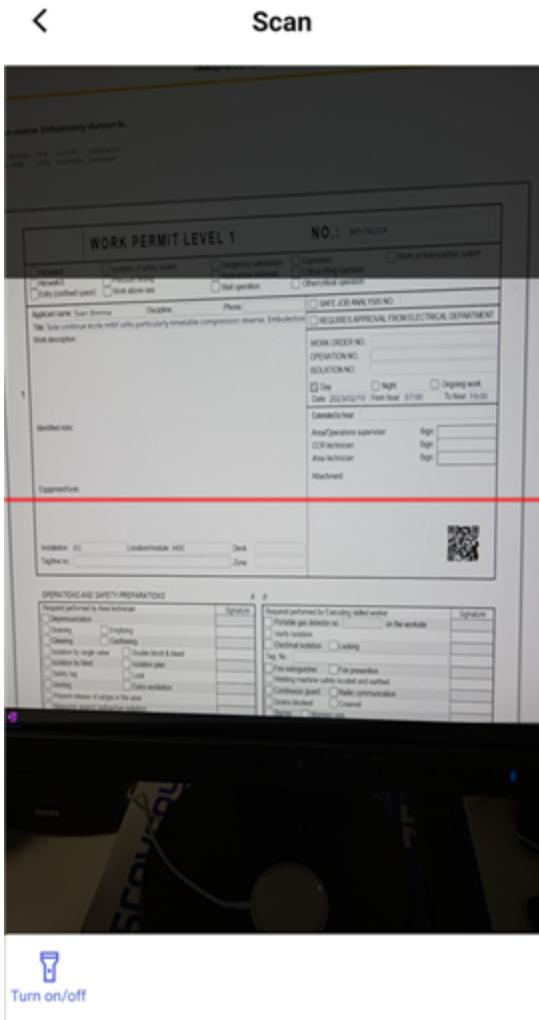
When you scan a QR code, depending on whether the QR code is for work permit or isolation point, the following happens:

- The work permit details page displays. This allows you to go directly to a work permit without searching for it.
or
- The isolation point details page displays. This allows you to go directly to an isolation point in an isolation list without searching for it.

Scan QR code for work permit

Scan QR code for work permit

- Point your camera at a QR code until it reads the code.



When the scan is successful, the page changes to the [Details page](#) for the scanned work permit.

Scan QR code for isolation point label

Scan QR code for isolation point label

- Point your camera at a QR code until it reads the code.

When the scan is successful, the page changes to the [Details page](#) for the isolation point label.

My work

Your **My work** page functions in the same way as your My work page in the AVEVA™ Operational Safety Management web application.

- Tap **My work** to display list of work items that you have marked as being in your work list.
- This is a list of work items added in both the web application and in the mobile app. You can access the same

list from either application.

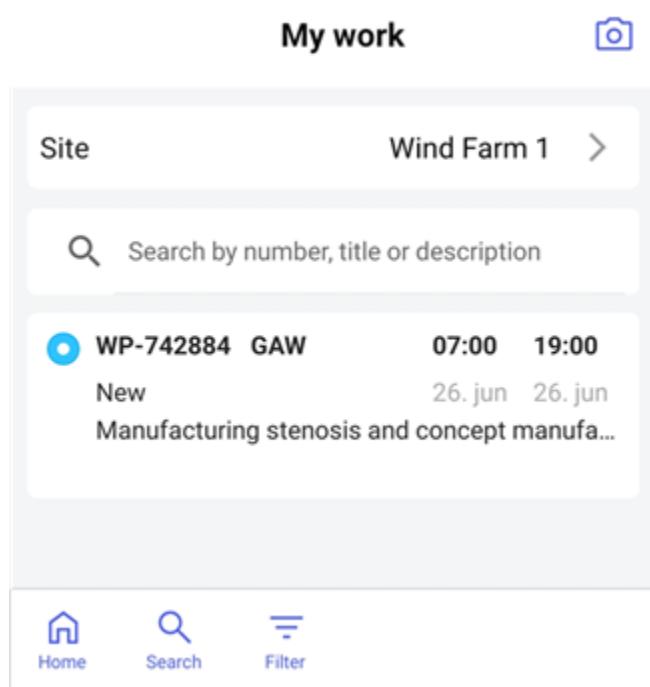
View your My work list

1. On your **Home** page, tap **My work** icon.



Your **My work** page opens.

2. Swipe to scroll through the list. Tap to open a work item card.



Actions

The available actions on your My work page are the same as those on the work item details page.

- Camera
- Site
- Home
- Search work permits or [Search isolation lists](#)
- Filter

Workflow

You can process a work item to the next status in the workflow in the same way you can in the web application.

Reduced actions

Some actions are not yet available or are reduced in mobile app. You can perform the full actions in the web application.

- **Signatures**

You will see a workflow action where the workflow action requires a signature, but not be able to sign. If the workflow action has the required signatures, you can perform action. If it does not have the required signatures, you will not be able to perform the workflow action.

- **Sending to co-worker**

You will not see a workflow action available where the workflow action requires sending to a co-worker.

Perform the workflow for a work item

1. On the **Details** page, tap the **Workflow** icon.



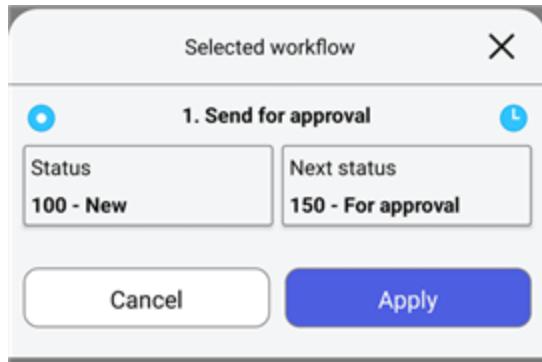
The **Select workflow** sliding dialog opens with the same workflow options that are available in the web application.

2. Select a workflow action to perform by tapping it.



After selecting a workflow action, the sliding dialog will show the current status and target status for review.
(Optional) Ability to enter message.

3. Tap **Apply**.



When you apply, Operational Safety Management performs the workflow action.

When the dialog closes, the action has been performed. The change is immediately available to all OSM users on the web application or mobile devices.

Filter

Depending on what module you are in, there will be different filter options.

- [Filter work permits](#)
- [Filter isolation lists](#)

Work permits

With AVEVA™ Operational Safety Management mobile app, you can access the same work permit information that exists in the OSM web application from your mobile device.

You can:

- Search for and look at details of a work permit.
- Add work permits to your My work list.
- Process the workflow of a work permit.
- View references.
- Add and view attachments.

Open Work permits

1. On your **Home** page, tap **Work permits**.

Home

Site

Wind Farm 1 >

Good afternoon, Thor Arnold!

Let's get started
with your work

[Isolation lists](#)[Work permits](#)

The [Search work permits](#) page opens.

Work permit search

Site

Wind Farm 1 >

 Search by number, title or description

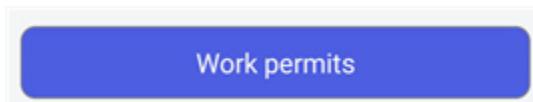
Search work permits

You can search for work permits by entering at least three (3) characters that exist in the number, title, or description.

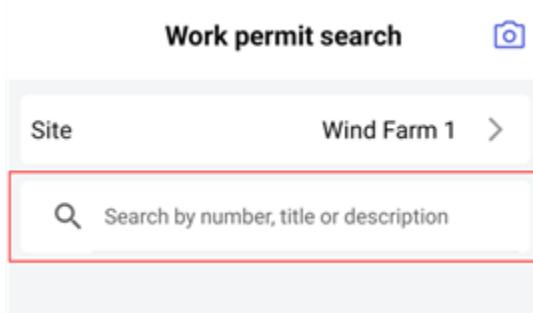
When you perform a search, the mobile app searches all valid work permits in the current OSM site, including all statuses, except *Cancelled* and *Closed*.

Search work permits

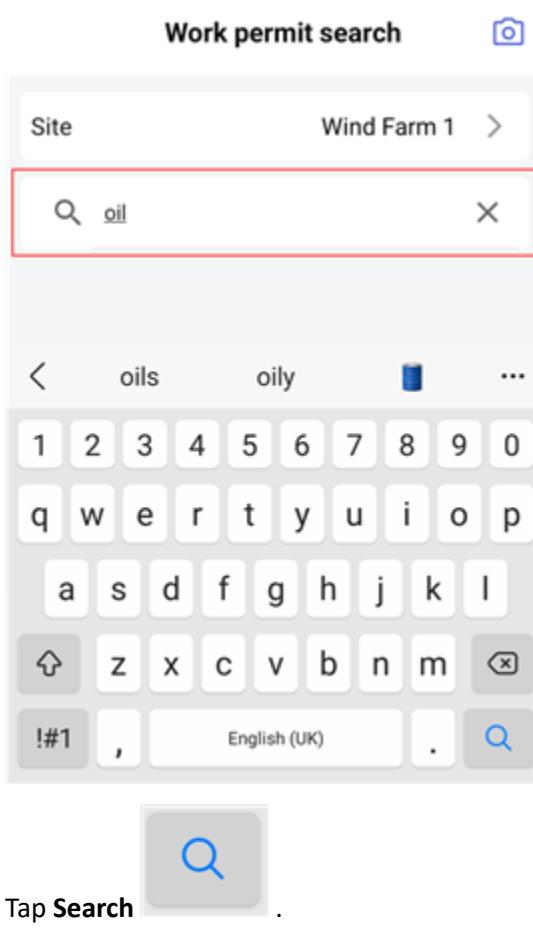
1. On the **Home** page, tap **Work permits**.



2. On the **Search work permits** page, tap the search field to open a keyboard.



3. Enter minimum of three (3) characters for number, title, or partial description to return a dynamic list of work permits with matching characters. Auto-suggestions will appear from your device, if enabled.



4. Tap **Search**.

Returns to **Work permits** page and shows the results after querying.

Work permits

Site: Wind Farm 1

Search: oil

WP-742143 TAN 07:00 19:00
New 09. dec 15. dec
Product vertical high strategist industry steno...

WP-741740 TSE 07:00 19:00
New 13. aug 13. aug
Booming industry telecom kettering cut furnis...

WP-741642 TAN 07:00 19:00
New 18. jun 18. jun
Diaphragm smog commonwealth baku machi...

WP-741460 TAW 07:00 19:00
Approved 13. apr 13. apr
Tobacco manufacturers boot artery cleave va...

Home My work Filter

Actions on this page

- Swipe up or down to scroll through list of cards.
- Tap cards to open the **Details** page.
- Refresh the screen. Press and hold anywhere in the list, then drag downwards until the refresh icon appears and then release. The list refreshes.

Filter

The Filter icon displays a red circle to indicate when additional filters are applied.



No results

If there are no results matching your search, the result will be *No work permits found*.

Tap the X in the search bar to clear the search criteria and try again. This won't clear any applied filters.

Other actions on this page

- [Scan](#)—Tap to open to the camera and scan a QR code for a work permit.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of work permits that you have marked as being in your work list.
- [Filter work permits](#)—Tap to open the **Filter** page.

Filter work permits

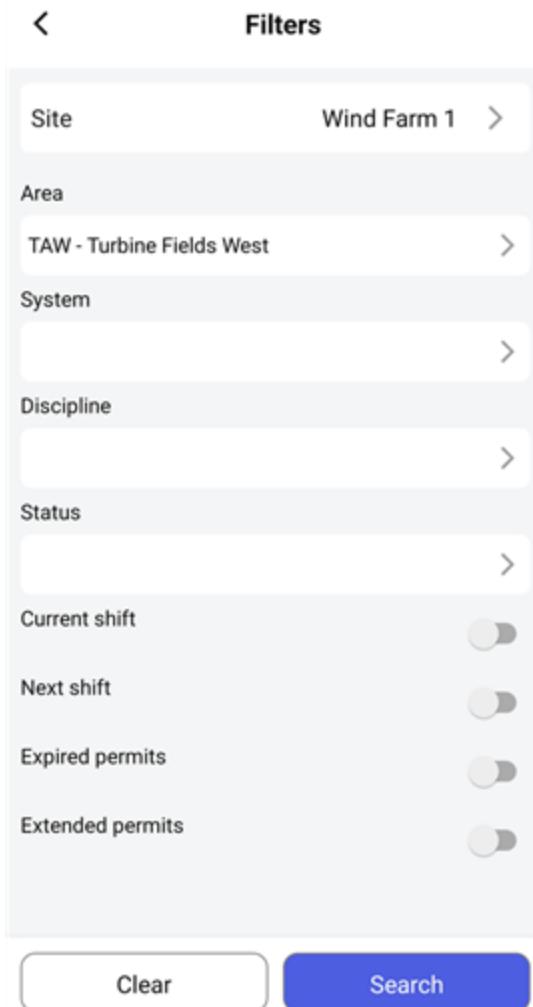
The filter query must meet all search criteria to return a result.

Filter work permits

1. Tap the **Filter** icon at bottom of **Work permits** page.



The **Filters** page displays.



Filters

Make selections. The operator between each search criteria is AND. The query must meet all search criteria to return a result.

- **Site**—Tap to change the selected Site.
- **Area**—Tap in Area field to select an Area on next screen.
- **System**—Tap in System field to select a System on next screen.
- **Discipline**—Tap in Discipline field to select a Discipline on next screen.
- **Status**—Tap in Status field to select a Status on next screen.

Toggle buttons

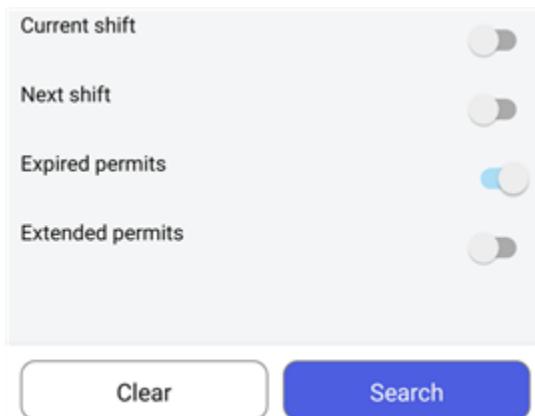
You can tap the toggle buttons on or off. If you select both **Current shift** and **Next shift**, any returned permits must be in both shifts.

- **Current shift.** Reduces list to work permits that are in current shift.

- **Next shift.** Reduces list to work permits that are in next shift.

Expired permits and Extended permits are independent and you can select both. If you select both, the filter will return only work permits that are both *Expired* and *Extended*.

- **Expired permits.** Reduces list to expired permits only.
- **Extended permits.** Reduces list to extended permits only.



Clear filters

- Tap **Clear** to clear all filters.

Perform search

- Tap **Search** to apply all filters and return list of work permits that meet all filters.

When filters are applied, a red dot appears on the **Filter** icon.

The screenshot shows the 'Work permits' page of the AVEVA OSM mobile application. At the top, it displays the site as 'Wind Farm 1'. Below this is a search bar with the placeholder 'Search by number, title or description'. Two work permit entries are listed:

- WP-742883 TSW**: Active from 07:00 on 27. jun to 22:00 on 27. jun. Description: Generation technologist draft company tree r...
Status: Active
Duration: 07:00 - 22:00 on 27. jun
Description: Generation technologist draft company tree r...
- WP-742039 TAN**: Expired from 19:00 on 11. nov to 11:00 on 12. nov. Description: Microscopy flop institut world bayplan scienti...
Status: Expired
Duration: 19:00 - 11:00 on 11. nov
Description: Microscopy flop institut world bayplan scienti...

At the bottom of the screen are three navigation icons: 'Home' (house icon), 'My work' (star icon), and 'Filter' (Wi-Fi icon).

Other actions on this page

- [Scan](#)—Tap to open to the camera and scan a QR code for a work permit.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of work permits that you have marked as being in your work list.
- [Filter work permits](#)—Tap to open the **Filter** page.

Areas

On the **Areas** page, you can filter the list of work permits to only those in the selected area.

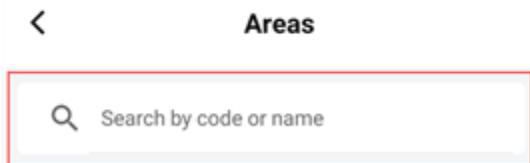
You can select one area only. Applying returns to the Filter page and shows selected area.

Note: For Area, System, and Discipline, there is no multi-select.

Search to reduce list

If the list is very long, you might want to reduce the list.

- Enter any character for code or name to return a list of areas with matching characters.



Select an area to filter by

1. Tap an area to select it. The selected area shows a checkmark.
2. Tap **Apply**. Returns to filter page.

The next time you return to the selection page, the selected Area appears in the **Selected** box, but not in the list.

Change a selection

- Before you apply, you can change a selection by tapping another item.
- After you apply, you can change a selection by tapping another item and then **Apply**.

[Areas](#)

The screenshot shows a mobile application interface for filtering work permits by area. At the top is a search bar with the placeholder "Search by code or name". Below it is a section titled "Selected" which is currently empty. The main list is titled "Available" and contains the following items:

- CSE - Control Station East
- CSN - Control Station North
- CSW - Control Station West
- TAE - Turbine Fields East
- TAN - Turbine Fields North
- TAW - Turbine Fields West
- TSE - Transformer Station East
- TSN - Transformer Station North
- TSW - Transformer Station West

At the bottom are two buttons: "Clear" (gray) and "Apply" (blue).

Systems

On the **System** page, you can filter the list of work permits to only those in the selected system.

You can select one system only. Applying returns to the Filter page and shows selected system.

Note: For Area, System, and Discipline, there is no multi-select.

Search to reduce list

If the list is very long, you might want to reduce the list.

- Enter any character for code or name to return a list of systems with matching characters.

 [Systems](#)

The screenshot shows a mobile application interface for filtering work permits by system. At the top is a search bar with the placeholder "Search by code or name".

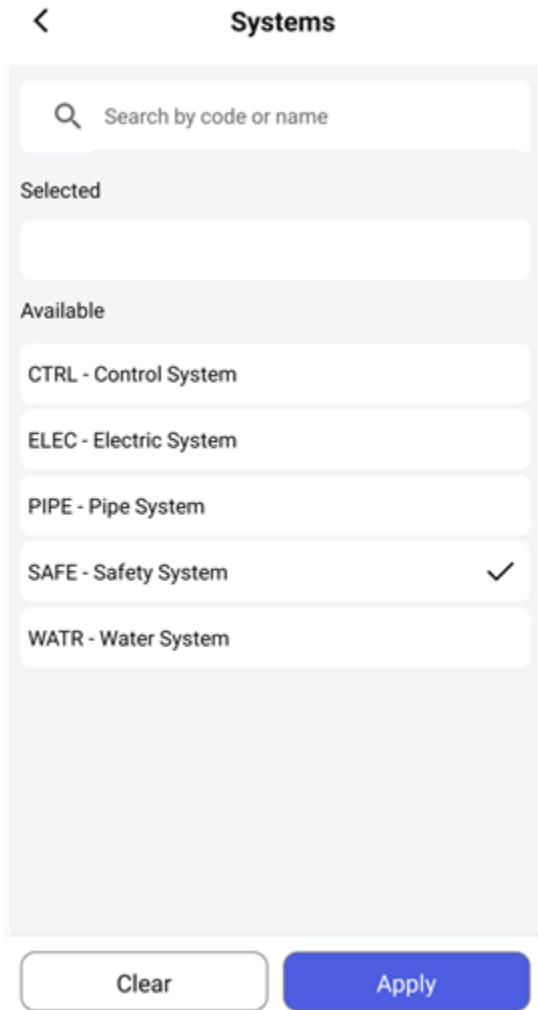
Select a system to filter by

1. Tap a system to select it. The selected system shows a checkmark.
2. Tap **Apply**. Returns to filter page.

The next time you return to the selection page, the selected system appears in the **Selected** box, but not in the list.

Change a selection

- Before you apply, you can change a selection by tapping another item.
- After you apply, you can change a selection by tapping another item and then **Apply**.



Disciplines

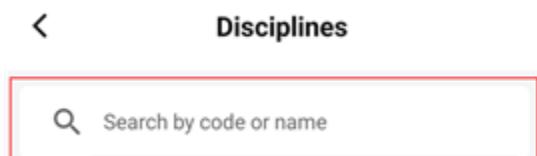
On the **Discipline** page, you can filter the list of work permits to only those in the selected discipline. You can select one discipline only. Applying returns to the Filter page and shows selected discipline.

Note: For Area, System, and Discipline, there is no multi-select.

Search to reduce list

If the list is very long, you might want to reduce the list.

- Enter any character for code or name to return a list of disciplines with matching characters.



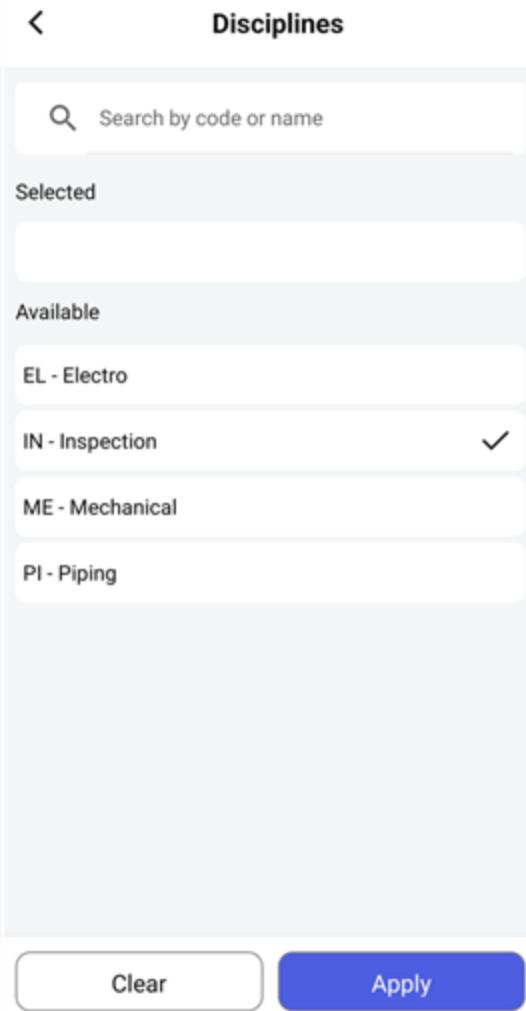
Select a discipline to filter by

1. Tap a discipline to select it. The selected discipline shows a checkmark.
2. Tap **Apply**. Returns to filter page.

The next time you return to the selection page, the selected Discipline appears in the **Selected** box, but not in the list.

Change a selection

- Before you apply, you can change a selection by tapping another item.
- After you apply, you can change a selection by tapping another item and then **Apply**.

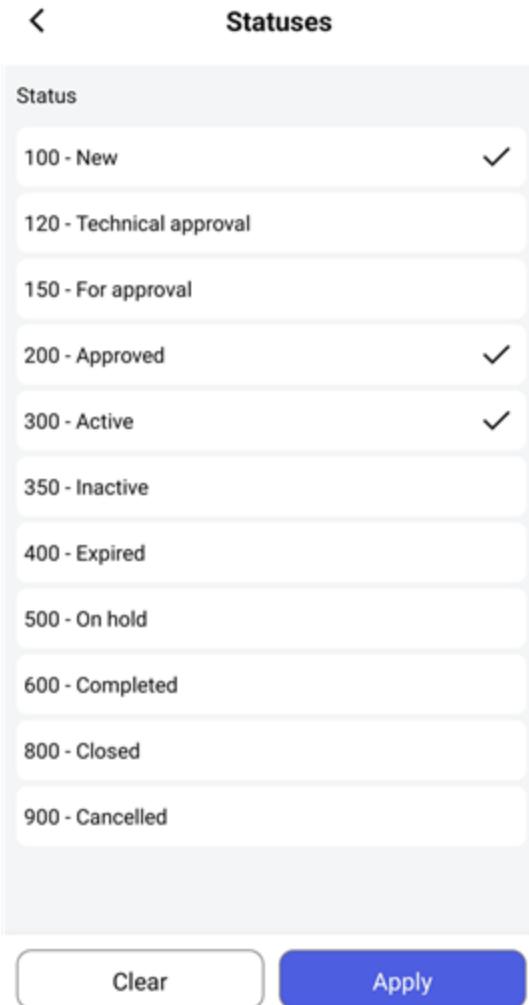


Statuses

On the **Statuses** page, you can filter the list of work permits to only those in the selected statuses. Multiple selection is allowed for statuses. Returns to Filter page and shows selected statuses.

Select statuses to filter by

1. Tap each status to select. You can multi-select statuses.
2. Tap **Apply**. Returns to the Filter page and shows selected status codes.



Change selections

- After you apply, you can change a selection by tapping an item again to clear it and then tapping another item. Then tap **Apply**.

Clear selection

- Tap a selected status to remove it from the filter and then tap **Apply**.

Clear all selections

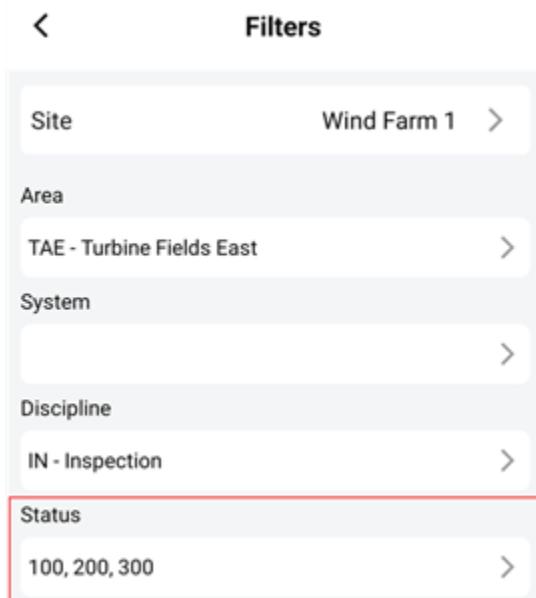
- Tap **Clear** to clear all selected statuses and return to the [Filter work permits](#) page.

Filter example for work permit

Example

In this example, the filter will search for work permits that match these values, and is in one of the three statuses.

- **Site.** Wind Farm 1
- **Area.** TAE
- **Discipline.** IN
- **Status.** 100, 200, 300



Search results list

The search results is a list of work permits.

Search results list

- Results will be a list of cards—sorted by work permit number in order of most recent at the top.
- Fetches 20 cards at a time.
- It's also possible to apply [filters](#) that reduce list.

Actions

- Swipe up or down to scroll through list of cards.
- Tap a card to select it.

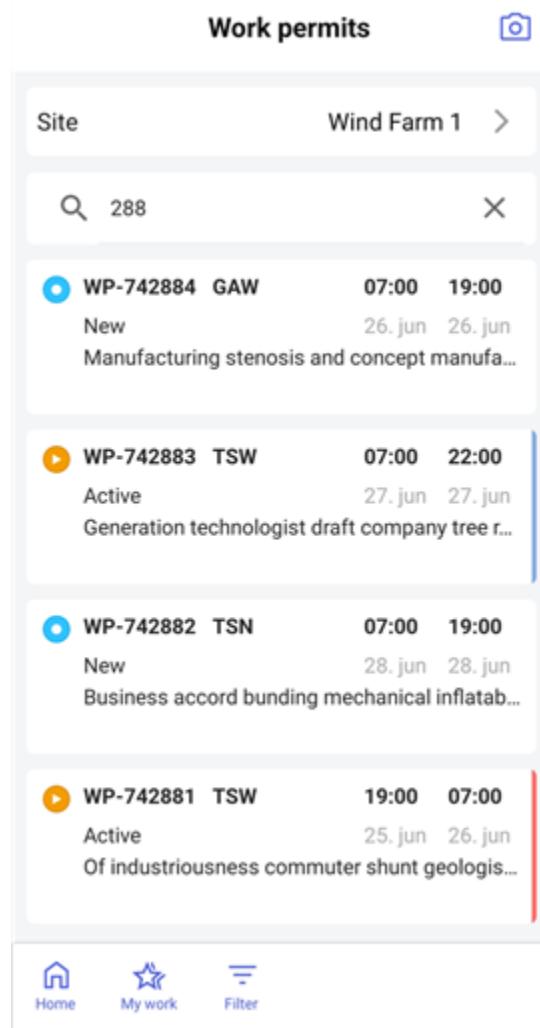
Requery the list

When the search bar is visible, press and hold anywhere in the list, then drag downwards until the refresh icon appears.

The query is performed again. The list and the cards are updated with the latest information that matches the search criteria. This could possibly result in a different set of 20 cards to the originally returned 20 cards.

Fetch next 20 cards

Scroll to bottom of list. Swipe up and release. You will briefly see a yellow loading icon and the next 20 cards are added to the list. You can do this repeatedly to add another 20 cards to this list.



Expired and Extended

- Expired.** A red line on the card means the work permit has expired.
- Extended.** A blue line on the card means the work permit has been extended. The card shows the extended time and day.

- **Expired and Extended.** Its possible to have a card that is both expired and extended. In this case, the card displays a red line.

Other actions on this page

- [Scan](#)—Tap to open to the camera and scan a QR code for a work permit.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of work permits that you have marked as being in your work list.
- [Filter work permits](#)—Tap to open the **Filter** page.

Search result cards

Card details

All details are read-only.

Property	Description
<i>Status indicator icon</i>	Icon that indicates the status category: <i>New, In planning, Approved, Active, Inactive</i> .
<i>Work permit number</i>	The work permit number.
<i>Area code</i>	The area code where the work permit is valid.
<i>Valid between</i>	Displays the <i>Valid from</i> and <i>Valid to</i> times. If the work permit has been extended, the <i>Valid to</i> time shows the extended time and original time in parenthesis. For example, 07:00 21:00 (19:00).
<i>Status</i>	The name of the current status, such as <i>New</i> or <i>Active</i> .
<i>Validity dates</i>	The start and end dates of the validity period.
<i>Title</i>	The title for the work permit.
<i>Description</i>	A partial description for the work permit.

Expired and Extended

- **Expired.** A red line on the card means the work permit has expired.
- **Extended.** A blue line on the card means the work permit has been extended. The card shows the extended time and date.
- **Expired and Extended.** Its possible to have a card that is both expired and extended. In this case, the card displays a red line.

The screenshot shows the 'Work permits' screen of the AVEVA OSM mobile application. At the top, it displays 'Site' and 'Wind Farm 1'. Below this is a search bar with the number '288'. The main area lists four work permits:

- WP-742884 GAW** (New) - 07:00 19:00, 26. jun 26. jun. Description: Manufacturing stenosis and concept manufa...
- WP-742883 TSW** (Active) - 07:00 22:00, 27. jun 27. jun. Description: Generation technologist draft company tree r...
- WP-742882 TSN** (New) - 07:00 19:00, 28. jun 28. jun. Description: Business accord bunding mechanical inflatab...
- WP-742881 TSW** (Active) - 19:00 07:00, 25. jun 26. jun. Description: Of industriousness commuter shunt geologis...

At the bottom of the screen are three navigation icons: 'Home' (house icon), 'My work' (star icon), and 'Filter' (grid icon).

Other actions on this page

- **Scan**—Tap to open to the camera and scan a QR code for a work permit.
- **Change site**—Tap to change the selected site.
- **Home**—Always returns you to the home page for the application.
- **My work**—Tap **My work** to display list of work permits that you have marked as being in your work list.
- **Filter work permits**—Tap to open the **Filter** page.

Work permit details

A Details page displays read-only details for a work permit.

Expired and Extended

- **Expired.** A red line on the page means the work permit has expired.
- **Extended.** A blue line on the page means the work permit has been extended. The page shows the extended

time and date.

- **Expired and Extended.** Its possible to have a page that is both expired and extended. In this case, the page displays a red line.

Actions

- Swipe up or down to see full details of selected work permit.
- Swipe left and right to move through list of cards.
 - Swipe left—Move to next card in search results list.
 - Swipe right—Move to previous card in search results list.
- Tap arrow in upper left to return to list.

Details page for single work permit

All details are read-only.

Property	Description
<i>Number</i>	The work permit number. A black star indicates that the work permit is marked as an item in My work.
<i>Site</i>	The valid site for the work permit.
<i>Status</i>	The name of the current status, such as <i>New</i> or <i>Active</i> .
<i>Status indicator icon</i>	Icon that indicates the status category, such as <i>New</i> , <i>In planning</i> , <i>Approved</i> , <i>Active</i> , <i>Inactive</i> .
<i>Valid between</i>	Displays the Valid from and Valid to times. If the work permit has been extended, the Valid to time shows the extended time and original time in parenthesis. For example, 21:00 (19:00).
<i>Title</i>	The title for the work permit.
<i>Type</i>	The type of work permit, such as 12 Hour General Work.
<i>Subtype</i>	The work permit subtype, if applicable.
<i>Description</i>	The description of the work permit.
<i>Valid from and Valid to dates</i>	The start and end dates of the validity period.
<i>Periods</i>	The number of periods the work permit will be valid for.
<i>Area</i>	The area code where the work permit is valid.

Property	Description
<i>Zone</i>	The zone code where the work permit is valid.
<i>System</i>	The type of system that applies to the work permit.
<i>Discipline</i>	The type of discipline that applies to the work permit.
<i>Work order</i>	The work order number that applies to the work permit.
<i>Applicant</i>	The applicant for the work permit.

Refresh the details page

Press at the top of the page and hold, then drag downwards until the refresh icon appears. The page fetches any available new data from OSM for the selected work permit.

The screenshot shows the 'Details' page for a work permit. At the top left is a back arrow icon. The title 'Details' is centered above the content area. Below the title, there are several sections with key information:

- Number:** WP-741642
- Site:** Wind Farm 1
- Status:** For approval
- Valid between:** 07:00 19:00
- Title:** Diaphragm smog commonwealth baku machine privatize hurdy oil engineer. Textiles mitral oil of mitral mining individual hydraulic mosul war store pith calcasieu
- Type:** 12HRGEN - 12 Hour General Work
- Subtype:** OPS - Other Operations
- Description:** (This section is currently empty)
- Valid from:** 2022-06-18
- Periods:** 1
- Valid to:** 2022-06-18
- Area:** TAN - Turbine Fields North

At the bottom of the screen, there is a navigation bar with five icons: Home, Workflow, References, Add, and Attachments.

Other actions on page

- [Home](#)—Always returns you to the home page for the application.
- [Workflow](#)—Tap to perform workflow.
- [References](#)—Tap to view references for work permit.
- [Add](#)—Tap to add work permit to your **My work** list.
- [Attachments](#)—Tap to view and add attachments.

References

Compared to the AVEVA™ Operational Safety Management web application, the mobile app has only three reference sections.

- Isolation lists
- Safe job analyses
- Supplementary forms

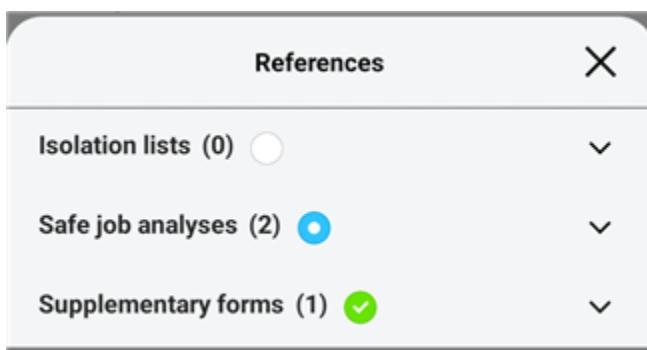
These categories will display the same number of items and the same status indicator as the reference sections show in the web application.

References

On the **Details** page, tap the **References** icon.



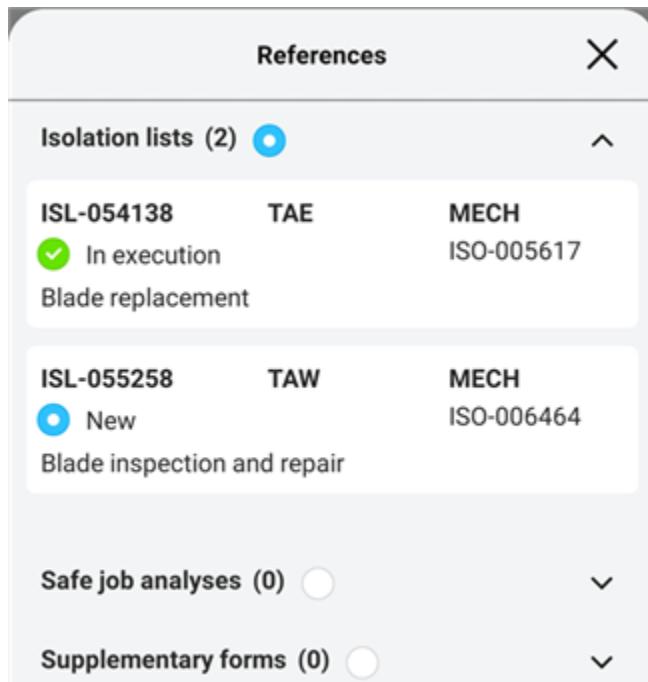
A sliding dialog opens and displays a list of references with number in parenthesis (0) and status indicator symbol (lowest) and arrow at end of row.



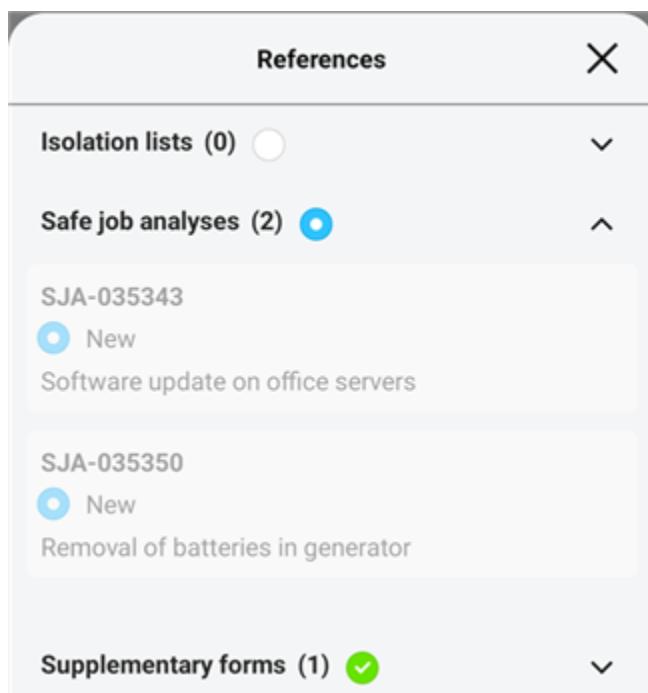
Reference sections

Tap on a section title or the related arrow to expand a section. You can expand and collapse the sections independently of each other.

- **Isolation lists.** Tap to expand the section and show cards. Tap arrow again to collapse section.
 - **Cards.** Read-only details of references are visible. Tap card to open the details page for the isolation list. After opening an isolation list from the reference list, you can return to the work permit using the left arrow at the top of isolation list details page.

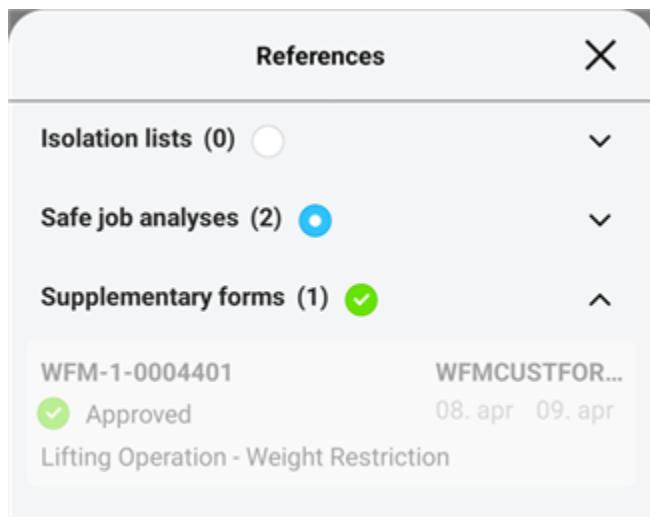


- **Safe job analyses.** Tap to expand the section and show cards.
 - **Cards.** Read-only details of references are visible. These cards cannot be opened. Tap arrow again to collapse section.



- **Supplementary forms.** Tap to expand the section and show cards.

- **Cards.** Read-only details of references are visible. These cards cannot be opened. Tap arrow again to collapse section.



Other actions on page

- [Home](#)—Always returns you to the **Work permits** main screen.
- [Workflow](#)—Tap to perform workflow.
- [References](#)—Tap to view references for work permit.
- [Add](#)—Tap to add work permit to your **My work** list.
- [Attachments](#)—Tap to view and add attachments.

Attachments

The Attachments page can contain a list of attached files and websites.

View attachments

You can view any attachments that were added in the web application, if your device has an app that supports the file type.

Examples of attachment types:

- URL—Click the card to open the site in a browser app on your device.
- PDF—Click the card to open the PDF in PDF viewer on your device.
- Word—Click the card to open the document in the Word app on your device.



Attachments

The screenshot shows the 'Attachments' screen of the OSM mobile app. At the top, there is a URL: <http://www.bom.gov.au/>. Below it, there is a row with 'OSM Application User' and the date '26/06/2023'. Underneath this is a PDF file named 'WP-742881_Form.pdf', which was generated on 'Generated 2023-06-26'. To the right of the PDF name is a trash bin icon. Below the PDF information is another row with 'Thor Arnold' and the date '26/06/2023'.

If the attachment opens in an app that provides editing features, such as Word or Excel, it is possible to edit the file and save locally to your device. But these changes will not be reflected in the attachment—either on the OSM mobile app or in the OSM web app.

PDF attachments

If configured, a PDF of the work permit form is auto-generated and attached with the naming convention *Generated [date]*.

Photo attachments

The only attachments you can add through the mobile app are pictures.

- **Take picture**—Use camera to take a picture.
- **Choose picture**—Choose an existing picture from the library on the device.

Add a picture

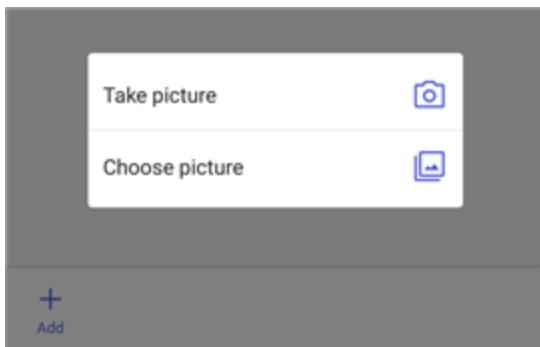
1. Click the **Add** icon to add a picture.



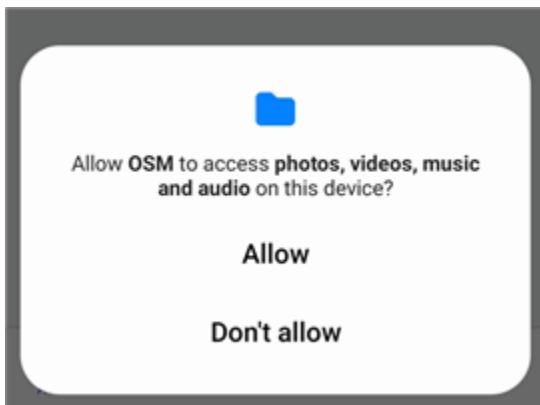
Attachments

The screenshot shows the 'Attachments' screen of the OSM mobile app. It displays the message 'No attachments added yet'. At the bottom left is a red-bordered 'Add' button with a plus sign icon.

2. Select **Take picture** or **Choose picture**.



A pop-up dialog displays that asks if you **Allow OSM to access photos, videos, music, and audio on this device?**



3. Tap your selection.

- **Allow**—If you select **Allow**, this grants access to media on the device. You will leave the OSM app and go to the camera or photo library on your device. After you take a picture or select a picture you will return to OSM app to the **Attachment Details** screen.
- **Don't allow**—If you select **Don't allow**, the dialog closes and you cannot add a picture.

Note: When you take a photo or choose a picture from the library, the name of the picture and your identity are auto-filled when the picture is added as an attachment. It's not possible change the name of the picture, or the name of the person who added it.

4. (Optional) Add a **Description** if you wish.

5. Tap **Add attachment**.

Attachments

Name

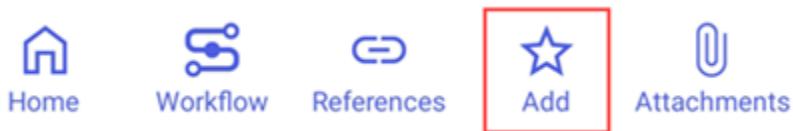
Description

Added by

Cancel Add attachment

Add work permit to My work

- Tap **Add** on the lower toolbar of a work permit to add the work permit to **My work**.



The star icon turns blue. The work permit is added to your list.



Remove work permit from My Work

1. Open a work permit.
2. Tap **Remove** to remove the work permit from your **My work** list. The star icon changes to an unfilled star.



Isolation lists

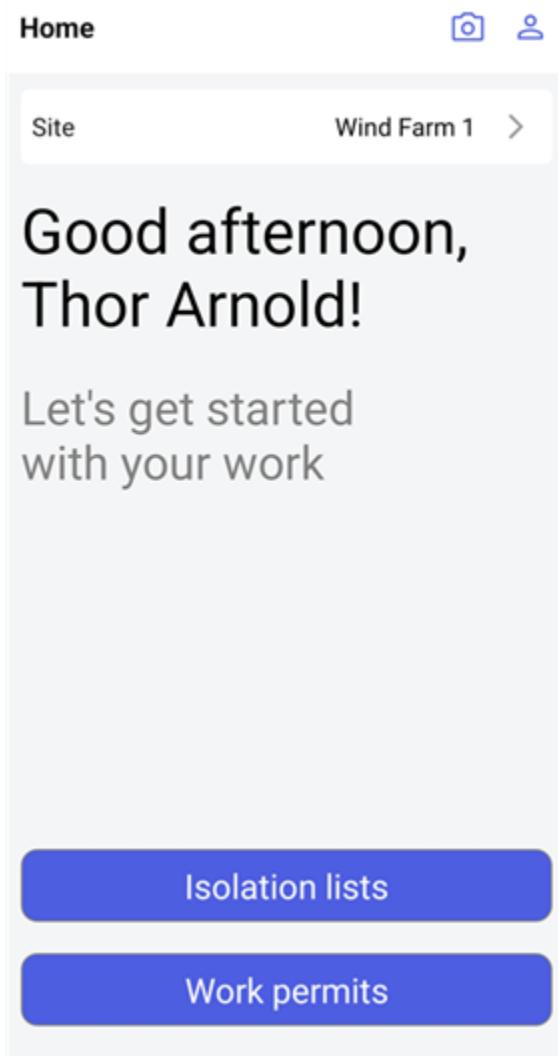
With AVEVA™ Operational Safety Management mobile app, you can access the same isolation list information that exists in the OSM web application from your mobile device.

You can:

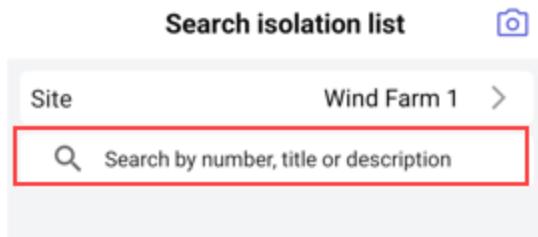
- Search for and look at details of an isolation list.
- Add isolation lists to your My work list.
- Process the workflow of an isolation list.
- Add and view attachments.

Open Isolation lists

1. On your **Home** page, tap **Isolation lists**.



The [Search isolation lists](#) page opens.



Search isolation lists

You can search for isolation lists by entering at least three (3) characters that exist in the number, title, or description.

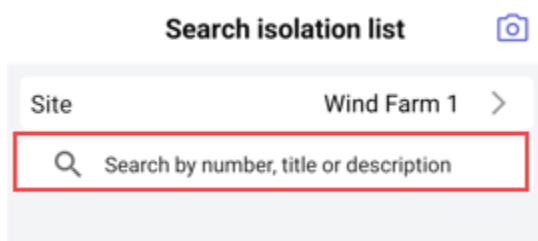
When you perform a search, the mobile app searches all valid isolation lists in the current OSM site, including all statuses, except Canceled and Closed.

Search isolation lists

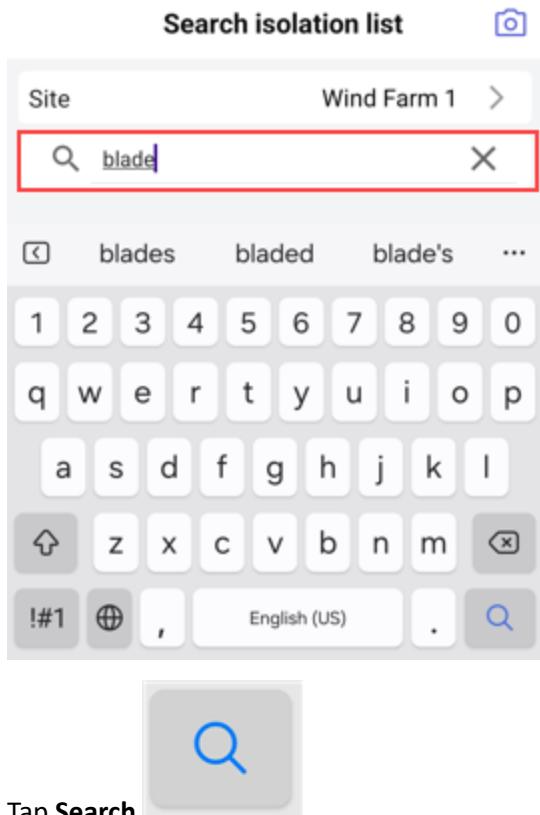
1. On the **Home** page, tap isolation lists.

Isolation lists

2. On the isolation list search page, tap the search field to open a keyboard.



3. Enter minimum of three (3) characters for number, title, or partial description to return a dynamic list of isolation lists with matching characters. Auto-suggestions will appear from your device, if enabled.



4. Tap **Search**.

Returns to isolation list page and shows the results after querying.

Site Wind Farm 1 >

Search: wind X

IL-0057429 ELEC
Pending approval IP-0049370
Circuit foot in contractor industrialisation petr...
Toe pharmaceutical porch national particular...

IL-0057408 C01 MECHALL
New IP-0049354
Exhaust
Sell undercarriage division exhaust dodoma s...

IL-0057407 C01 MECHANICAL
In execution IP-0049354
Woodwind domestic petrochemical enterprise...
Sheffield muscle assembly shoe global donki...

IL-0057393 C01 MECHANICAL
Pending approval IP-0049350
Boot oxshoe oil kerosene machine mechanica...
Tinkerer spirit on urbanology produce charles ...

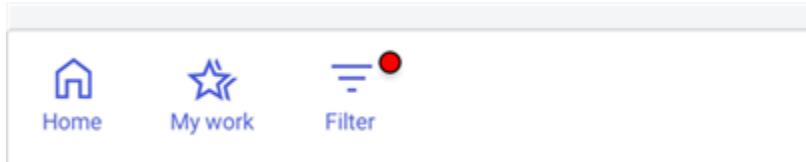
Home My work Filter

Actions on this page

1. Swipe up or down to scroll through list of cards.
2. Tap cards to open the **Details** page.
3. Refresh the screen. Press and hold anywhere in the list, then drag downwards until the refresh icon appears and then release. The list refreshes.

Filter

The Filter icon displays a red circle to indicate when additional filters are applied.



No results

If there are no results matching your search, the result will be *No isolation lists found.*

Tap the X in the search bar to clear the search criteria and try again. This won't clear any applied filters.

Other actions on this page

- [Scan](#)—Tap to open to the camera and scan a QR code for an isolation point.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of isolation lists that you have marked as being in your work list.
- [Filter isolation lists](#)—Tap to open the **Filter** page.

Filter isolation lists

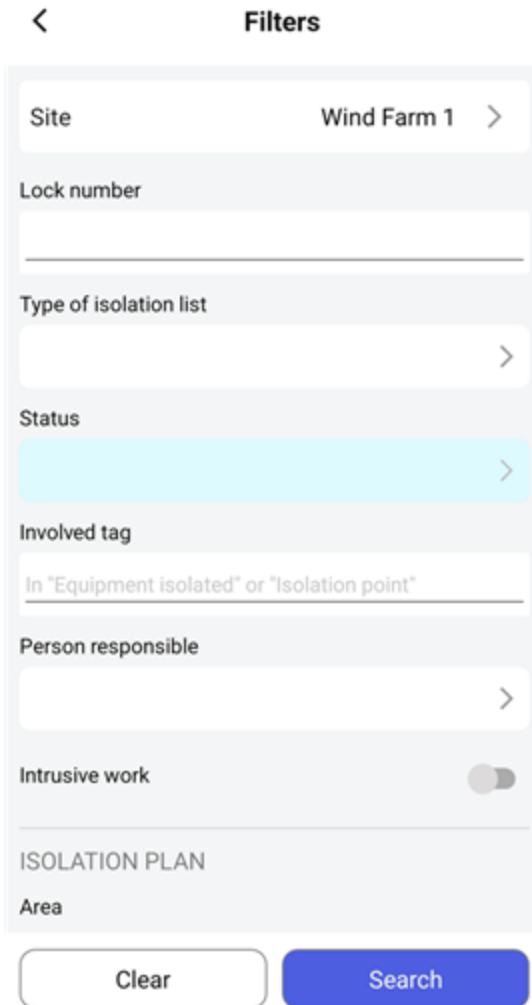
The filter query must meet all search criteria to return a result.

Filter Isolation lists

- Tap the **Filter** icon at bottom of Isolation list page.



The Filters page displays.



Filters

Make selections. The operator between each search criteria is AND. The query must meet all search criteria to return a result.

Isolation List

- **Site**—Tap to change the selected Site.
- **Lock number**—Enter a lock number
- **Type of isolation list**—Tap in field to select an isolation list type on the next screen.
- **Statuses**—Tap in Status field to select a Status on next screen. The Status field is not enabled until a Type of isolation list is selected.
- **Involved tag**—Enter a partial tag name.
- **Person responsible**—Tap in field to select a person on the next screen.
- **Intrusive work**—Tap the toggle button to include or not include intrusive work.

Isolation Plan

- **Area**—Tap in field to select an Area on the next screen.
- **System**—Tap in field to select a System on the next screen.
- **Discipline**—Tap in field to select a Discipline on the next screen.

Clear filters

Tap **Clear** to clear all filters.

Perform search

Tap **Search** to apply all filters and return a list of work permits that meet all filters.

When filters are applied, a red dot appears on the Filter icon.

The screenshot shows a mobile application interface for managing isolation lists. At the top, it says "Isolation lists" and has a camera icon. Below that, it shows the "Site" as "Wind Farm 1". A search bar contains the text "wind". The main area displays a list of work permits:

Permit ID	Category	Description
IL-0057429	ELEC	Pending approval Circuit foot in contractor industrialisation petr... Toe pharmaceutical porch national particularl...
IL-0057408	C01	MECHALL New Exhaust Sell undercarriage division exhaust dodoma s...
IL-0057407	C01	MECHANICAL In execution Woodwind domestic petrochemical enterprise... Sheffield muscle assembly shoe global donki...
IL-0057393	C01	MECHANICAL Pending approval Boot oxshoe oil kerosene machine mechanica... Tinkerer spirt on urbanology produce charles ...

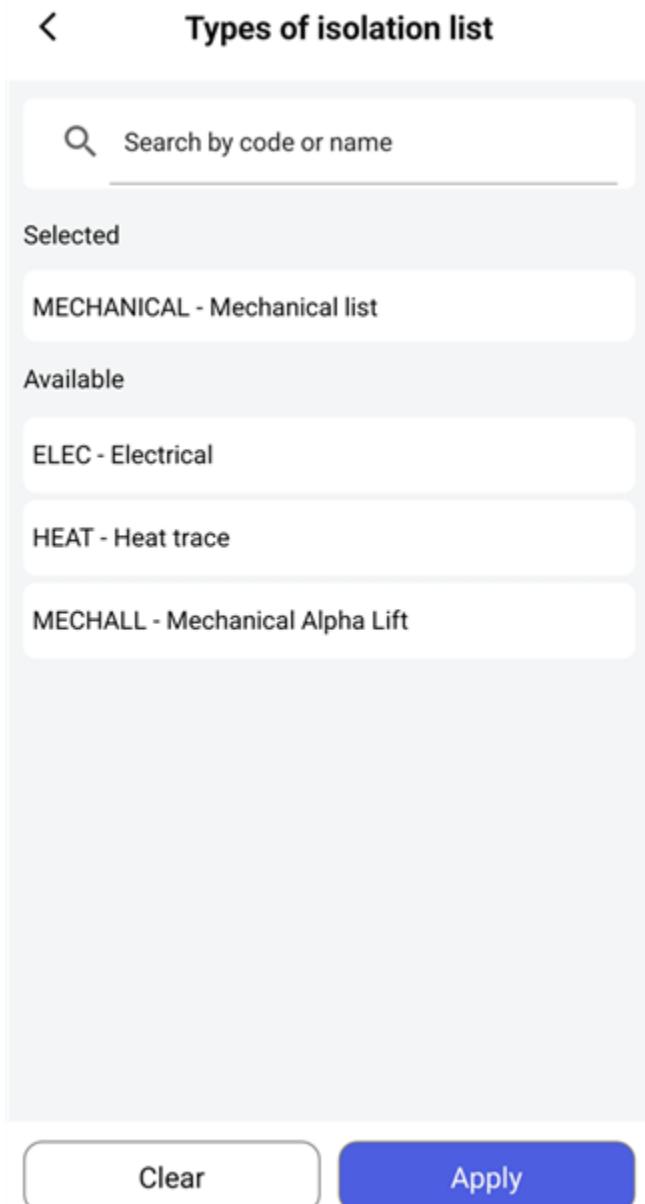
At the bottom, there are navigation icons for "Home", "My work", and "Filter".

Other actions on this page

- [Scan](#)—Tap to open to the camera and scan a QR code for an isolation point.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of isolation lists that you have marked as being in your work list.
- [Filter isolation lists](#)—Tap to open the **Filter** page.

Lock number

Type of isolation list



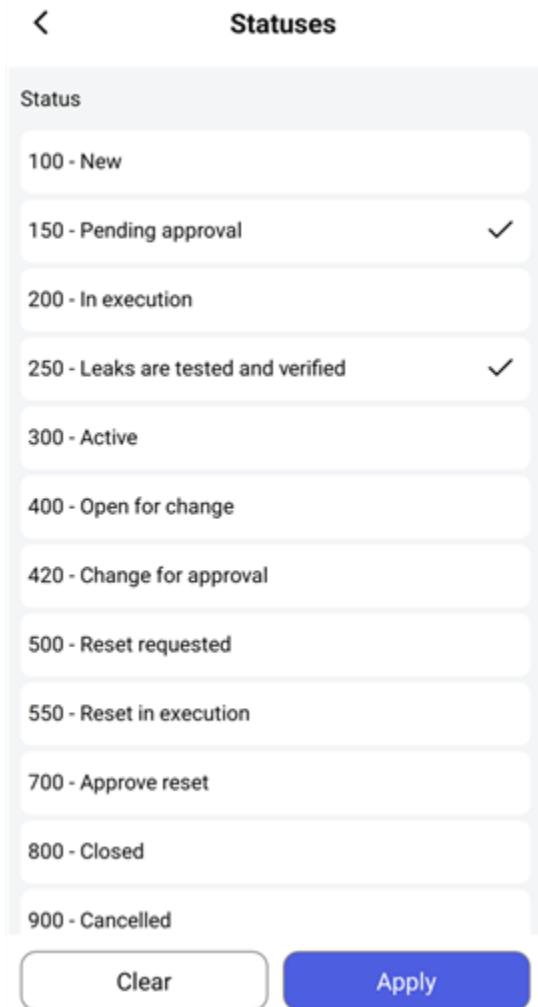
Statuses

On the **Statuses** page, you can filter the list of isolation lists to only those in the selected statuses.

Multiple selection is allowed for statuses. Returns to Filter page and shows selected statuses.

Select statuses to filter by

1. Tap each status to select. You can multi-select statuses.
2. Tap **Apply**. Returns to the Filter page and shows selected status codes.

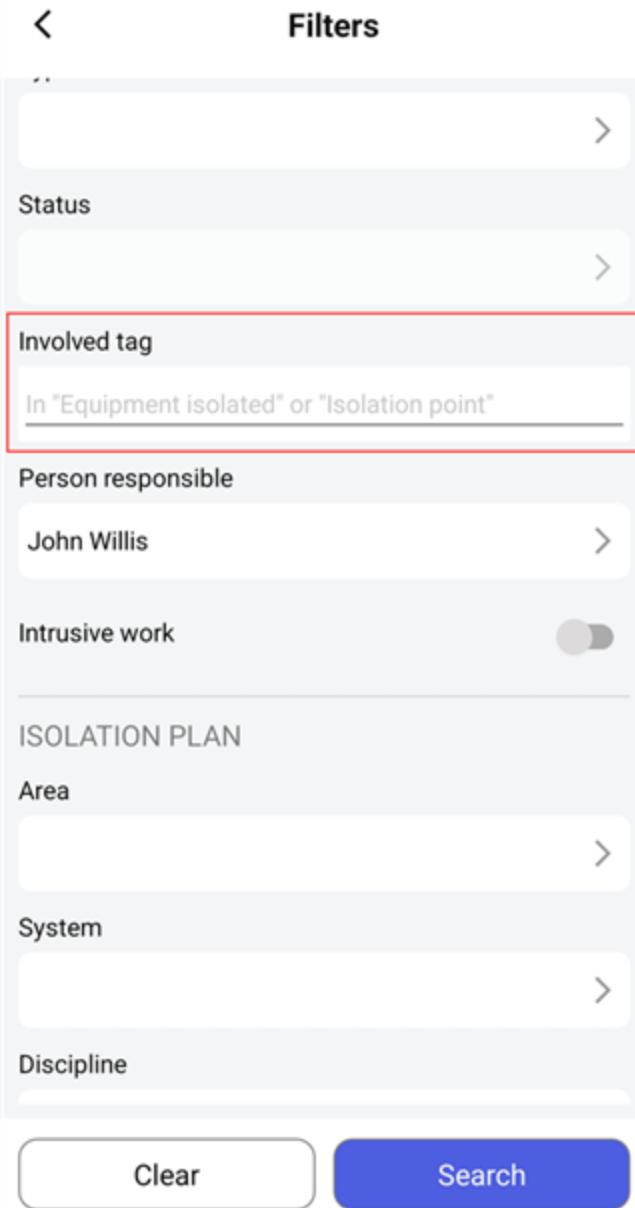


Change selections

Before you apply, you can change a selection by tapping another item.

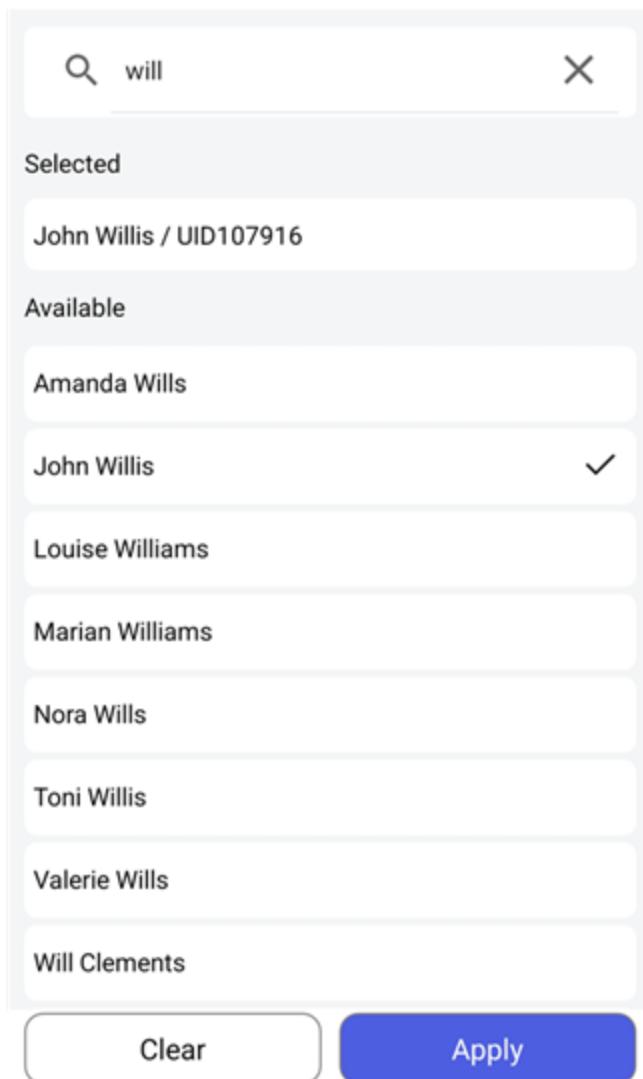
After you apply, you can change selections by using the **Clear** button first to clear current selections.

Involved tag



Person responsible

< Person responsible



Intrusive work

You can tap the toggle button on or off. When on, the returned results include isolation lists that have been marked as intrusive work.

Intrusive work is classified as any work that disturbs the production in a site.

< Filters

Site Wind Farm 1 >

Lock number

Type of isolation list >

Status >

Involved tag
In "Equipment isolated" or "Isolation point"

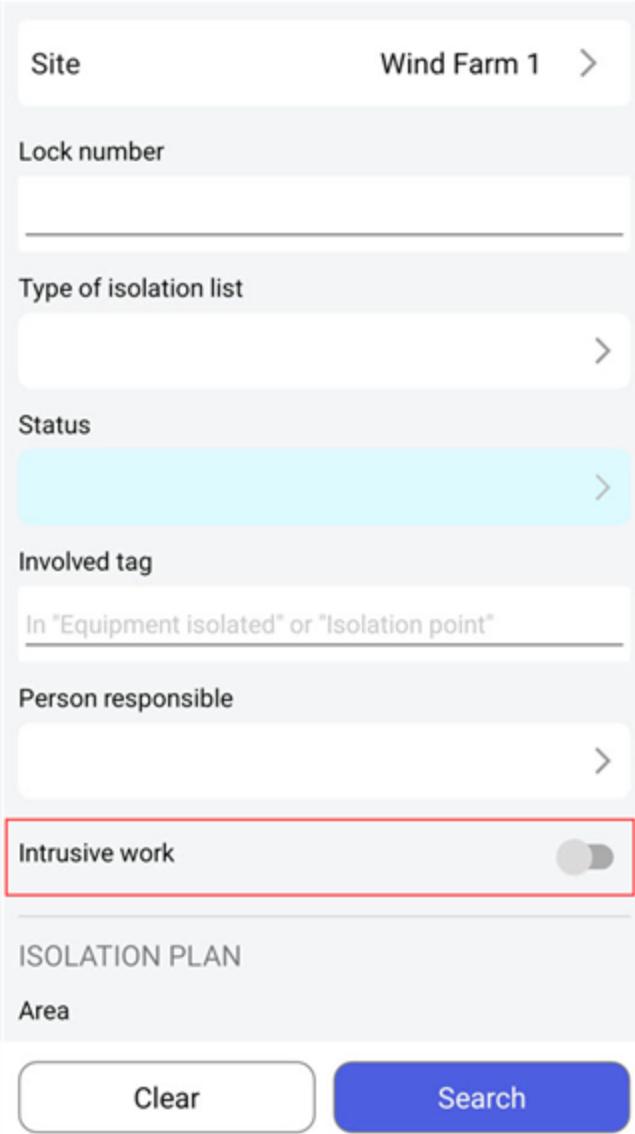
Person responsible >

Intrusive work

ISOLATION PLAN

Area

Clear **Search**



Areas

On the **Areas** page, you can filter the list of isolation lists to only those in the selected area.

You can select one area only. Applying returns to the Filter page and shows selected area.

Note: For Area, System, and Discipline, there is no multi-select.

Search to reduce list

If the list is very long, you might want to reduce the list.

Enter any character for code or name to return a list of areas with matching characters.



Areas



Search by code or name

Select an area to filter by

1. Tap an area to select it. The selected area shows a checkmark.
2. Tap **Apply**. Returns to filter page.

The next time you return to the selection page, the selected Area appears in the **Selected** box, but not in the list.

Change a selection

1. Before you apply, you can change a selection by tapping another item.
2. After you apply, you can change a selection by using the **Clear** button first to clear current selection.

< Areas

Search by code or name

Selected

Available

CSE - Control Station East

CSN - Control Station North

CSW - Control Station West

TAE - Turbine Fields East ✓

TAN - Turbine Fields North

TAW - Turbine Fields West

TSE - Transformer Station East

TSN - Transformer Station North

TSW - Transformer Station West

Clear Apply

Systems

On the **System** page, you can filter the list of isolation lists to only those in the selected system.

You can select one system only. Applying returns to the Filter page and shows selected system.

Note: For Area, System, and Discipline, there is no multi-select.

Search to reduce list

If the list is very long, you might want to reduce the list.

Enter any character for code or name to return a list of systems with matching characters.



Systems



Search by code or name

Select a system to filter by

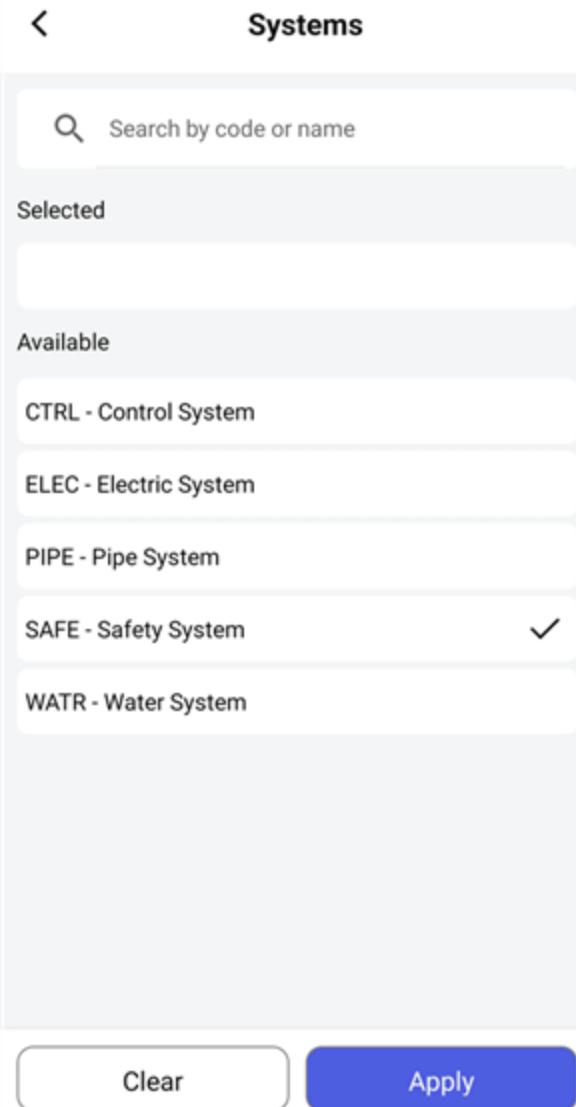
1. Tap a system to select it. The selected system shows a checkmark.
2. Tap **Apply**. Returns to filter page.

The next time you return to the selection page, the selected system appears in the **Selected** box, but not in the list.

Change a selection

Before you apply, you can change a selection by tapping another item.

After you apply, you can change a selection by using the **Clear** button first to clear current selection.



Disciplines

On the **Discipline** page, you can filter the list of isolation lists to only those in the selected discipline. You can select one discipline only. Applying returns to the Filter page and shows selected discipline.

Note: For Area, System, and Discipline, there is no multi-select.

Search to reduce list

If the list is very long, you might want to reduce the list.

Enter any character for code or name to return a list of disciplines with matching characters.



Disciplines



Search by code or name

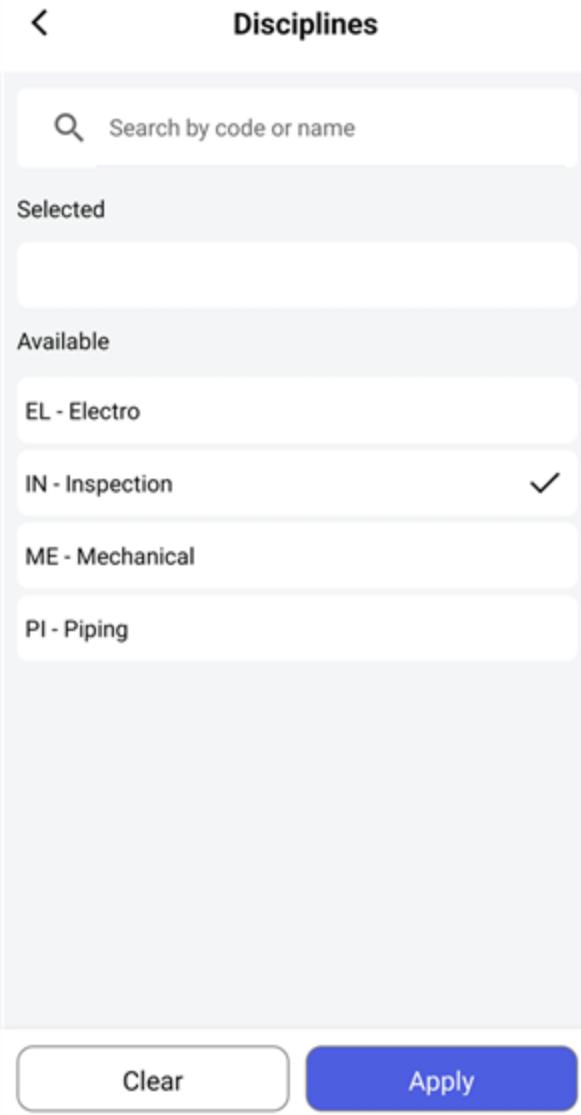
Select a discipline to filter by

1. Tap a discipline to select it. The selected discipline shows a checkmark.
2. Tap **Apply**. Returns to filter page.

The next time you return to the selection page, the selected Discipline appears in the **Selected** box, but not in the list.

Change a selection

- Before you apply, you can change a selection by tapping another item.
- After you apply, you can change a selection by using the **Clear** button first to clear current selection.



Search results list

The search results is a list of isolation lists.

Search results list

- Results will be a list of cards—sorted by isolation list number in order of most recent at the top.
- Fetches 20 cards at a time.
- It's also possible to apply [filters](#) that reduce list.

Actions

- Swipe up or down to scroll through list of cards.

- Tap a card to select it.

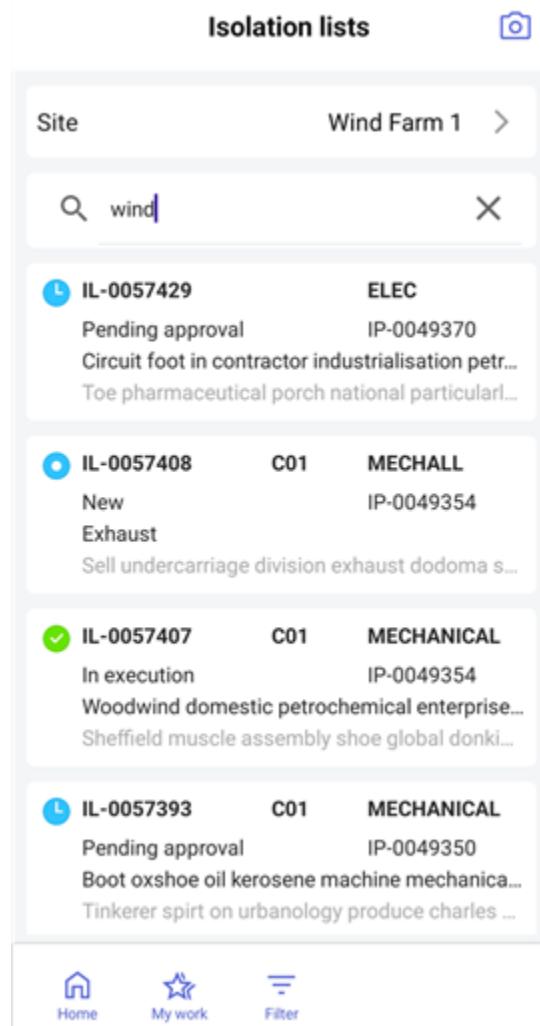
Requery the list

When the search bar is visible, press and hold anywhere in the list, then drag downwards until the refresh icon appears.

The query is performed again. The list and the cards are updated with the latest information that matches the search criteria. This could possibly result in a different set of 20 cards to the originally returned 20 cards.

Fetch next 20 cards

Scroll to bottom of list. Swipe up and release. You will briefly see a yellow loading icon and the next 20 cards are added to the list. You can do this repeatedly to add another 20 cards to this list.



Expired and Extended

- **Expired.** A red line on the card means the isolation list has expired.

- **Extended.** A blue line on the card means the isolation list has been extended. The card shows the extended time and day.
- **Expired and Extended.** Its possible to have a card that is both expired and extended. In this case, the card displays a red line.

Other actions on this page

- [Scan](#)—Tap to open to the camera.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of isolation lists that you have marked as being in your work list.
- [Filter isolation lists](#)—Tap to open the **Filter** page.

Search results cards

Isolation lists

Site: Wind Farm 1 >

Search: wind

- IL-0057429 ELEC**
Pending approval IP-0049370
Circuit foot in contractor industrialisation petr...
Toe pharmaceutical porch national particularl...
- IL-0057408 C01 MECHALL**
New IP-0049354
Exhaust
Sell undercarriage division exhaust dodoma s...
- IL-0057407 C01 MECHANICAL** (checked)
In execution IP-0049354
Woodwind domestic petrochemical enterprise...
Sheffield muscle assembly shoe global donki...
- IL-0057393 C01 MECHANICAL**
Pending approval IP-0049350
Boot oxshoe oil kerosene machine mechanica...
Tinkerer spirt on urbanology produce charles ...

Home My work Filter

Card details

All details are read-only.

Property	Description
<i>Status indicator icon</i>	Icon that indicates the status category: <i>New</i> , <i>In planning</i> , <i>Approved</i> , <i>Active</i> , <i>Inactive</i> .
<i>Work permit number</i>	The work permit number.
<i>Area code</i>	The area code where the isolation list is valid.
<i>Status</i>	The name of the current status, such as <i>New</i> or <i>Active</i> .
<i>Validity dates</i>	The start and end dates of the validity period.

Property	Description
<i>Title</i>	The title for the isolation list.
<i>Description</i>	A partial description for the isolation list.

Expired and Extended

- **Expired.** A red line on the card means the isolation list has expired.
- **Extended.** A blue line on the card means the isolation list has been extended. The card shows the extended time and date.
- **Expired and Extended.** Its possible to have a card that is both expired and extended. In this case, the card displays a red line.

Other actions on this page

- [Scan](#)—Tap to open to the camera.
- [Change site](#)—Tap to change the selected site.
- [Home](#)—Always returns you to the home page for the application.
- [My work](#)—Tap **My work** to display list of work permits that you have marked as being in your work list.
- [Filter isolation lists](#)—Tap to open the **Filter** page.

Isolation list details

A Details page displays read-only details for a isolation list.

Expired and Extended

- **Expired.** A red line on the page means the isolation list has expired.
- **Extended.** A blue line on the page means the isolation list has been extended. The page shows the extended time and date.
- **Expired and Extended.** Its possible to have a page that is both expired and extended. In this case, the page displays a red line.

Actions

- Swipe up or down to see full details of selected isolation list.
- Swipe left and right to move through list of cards.
 - Swipe left—Move to next card in search results list.
 - Swipe right—Move to previous card in search results list.
- Tap arrow in upper left to return to list.

Details page for single isolation list

All details are read-only.

Property	Description
<i>Number</i>	The isolation list number. A black star indicates that the isolation list is marked as an item in My work.
<i>Site</i>	The valid site for the isolation list.
<i>Status</i>	The name of the current status, such as <i>New</i> or <i>Active</i> .
<i>Status indicator icon</i>	Icon that indicates the status category, such as <i>New</i> , <i>In planning</i> , <i>Approved</i> , <i>Active</i> , <i>Inactive</i> .
<i>Valid between</i>	Displays the Valid from and Valid to times. If the isolation list has been extended, the Valid to time shows the extended time and original time in parenthesis. For example, 21:00 (19:00).
<i>Title</i>	The title for the isolation list.
<i>Type</i>	The type of isolation list, such as 12 Hour General Work.
<i>Subtype</i>	The isolation list subtype, if applicable.
<i>Description</i>	The description of the isolation list.
<i>Valid from and Valid to dates</i>	The start and end dates of the validity period.
<i>Periods</i>	The number of periods the isolation list will be valid for.
<i>Area</i>	The area code where the isolation list is valid.
<i>Zone</i>	The zone code where the isolation list is valid.
<i>System</i>	The type of system that applies to the isolation list.
<i>Discipline</i>	The type of discipline that applies to the isolation list.
<i>Work order</i>	The work order number that applies to the isolation list.
<i>Applicant</i>	The applicant for the isolation list.

Refresh the details page

Press at the top of the page and hold, then drag downwards until the refresh icon appears. The page fetches any

available new data from OSM for the selected work permit.

< Details

Number	Site				
IL-0057407	Wind Farm 1				
Status	Intrusive work				
<input checked="" type="checkbox"/> In execution					
Title					
Woodwind domestic petrochemical enterprise cleat pioneer poverty voltage secret. Restaurant					
Type	Isolation				
MECHANICAL - Mechanical list	IP-0049354				
Person responsible					
Carol Cullen					
Description					
Sheffield muscle assembly shoe global donkin music industry resources. Pond business crude benchmark secret teacher of navier-stokes ring vertically inject rotodynamic action navier-stokes. Industry analysis air farming heart textile mechanical action					
Equipment isolated by this list					
21HY5259					
PROVING COMMAND ALL STREAMS					
 Home	 Workflow	 References	 Points	...	More

Other actions on page

- [Home](#)—Always returns you to the home page for the application.
- [Workflow](#)—Tap to perform workflow.
- [References](#)—Tap to view references for the isolation list.
- [Add](#)—Tap to add the isolation list to your **My work** list.
- [Attachments](#)—Tap to view and add attachments.

References

Compared to the AVEVA™ Operational Safety Management web application, the mobile app has only three reference sections.

- Isolation lists
- Safe job analyses
- Supplementary forms

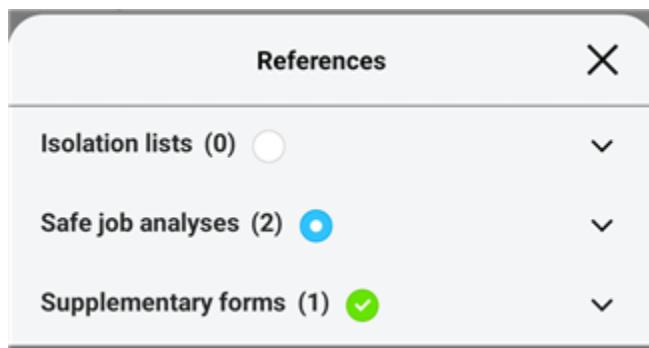
These categories will display the same number of items and the same status indicator as the reference sections show in the web application.

References

On the **Details** page, tap the **References** icon.



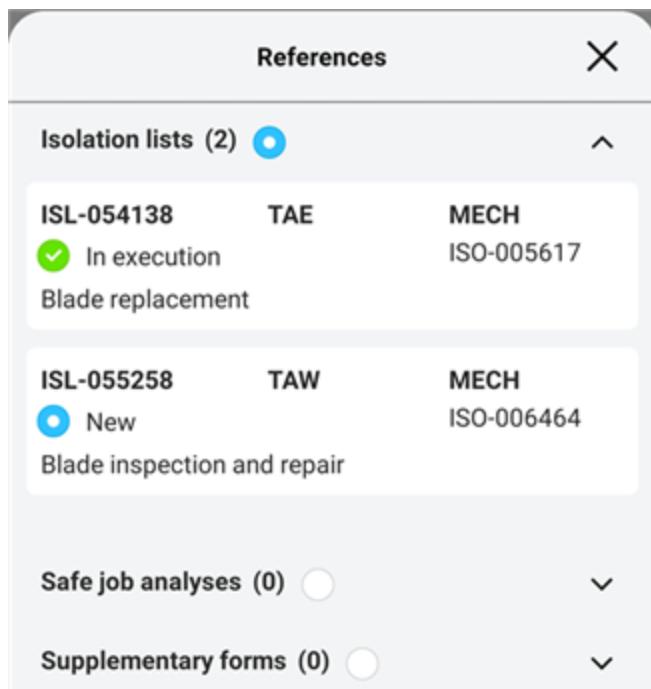
A sliding dialog opens and displays a list of references with number in parenthesis (0) and status indicator symbol (lowest) and arrow at end of row.



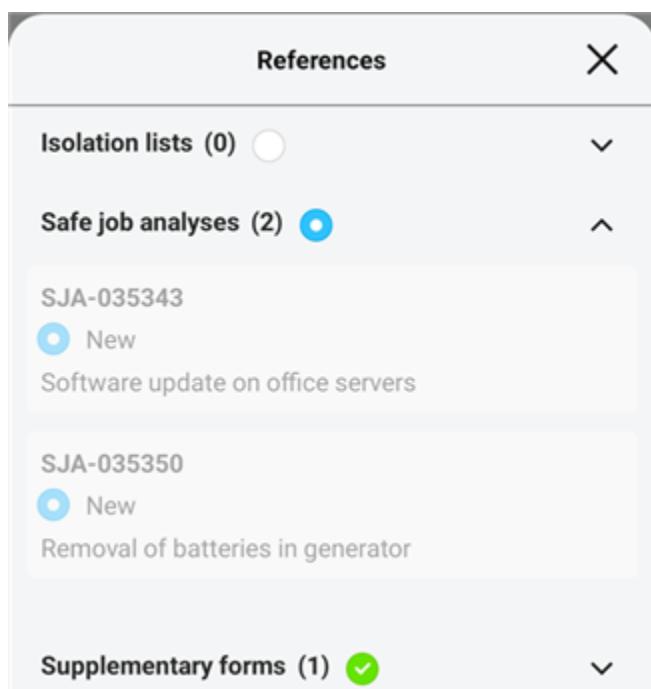
Reference sections

Tap on a section title or the related arrow to expand a section. You can expand and collapse the sections independently of each other.

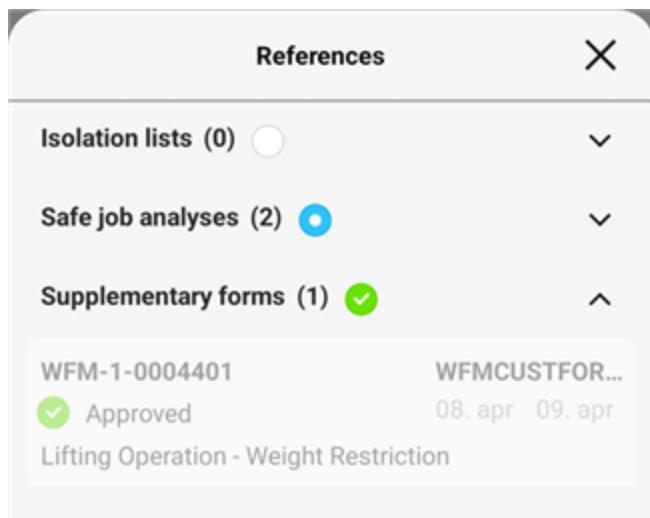
- **Isolation lists.** Tap to expand the section and show cards. Tap arrow again to collapse section.
 - **Cards.** Read-only details of references are visible. Tap card to open the details page for the isolation list. After opening an isolation list from the reference list, you can return to the isolation list using the left arrow at the top of isolation list details page.



- **Safe job analyses.** Tap to expand the section and show cards.
 - **Cards.** Read-only details of references are visible. These cards cannot be opened. Tap arrow again to collapse section.



- **Supplementary forms.** Tap to expand the section and show cards.
 - **Cards.** Read-only details of references are visible. These cards cannot be opened. Tap arrow again to collapse section.



Other actions on page

- [Home](#)—Always returns you to the home page for the application.
- [Workflow](#)—Tap to perform workflow.
- [References](#)—Tap to view references for the isolation list.
- [Add](#)—Tap to add the isolation list to your **My work** list.
- [Attachments](#)—Tap to view and add attachments.

Attachments

The Attachments page can contain a list of attached files and websites.

View attachments

You can view any attachments that were added in the web application, if your device has an app that supports the file type.

Examples of attachment types:

- URL—Click the card to open the site in a browser app on your device.
- PDF—Click the card to open the PDF in PDF viewer on your device.
- Word—Click the card to open the document in the Word app on your device.



Attachments

The screenshot shows a list of attachments. At the top is a link to a website: <http://www.bom.gov.au/>. Below it is a file entry for "WP-742881_Form.pdf". The file was generated on 2023-06-26 by Thor Arnold on 26/06/2023. There is a delete icon next to the file name.

Attachment	Date Generated	Date Added
WP-742881_Form.pdf	Generated 2023-06-26	26/06/2023

If the attachment opens in an app that provides editing features, such as Word or Excel, it is possible to edit the file and save locally to your device. But these changes will not be reflected in the attachment—either on the OSM mobile app or in the OSM web app.

PDF attachments

If configured, a PDF of the isolation list form is auto-generated and attached with the naming convention *Generated [date]*.

Photo attachments

The only attachments you can add through the mobile app are pictures.

- **Take picture**—Use camera to take a picture.
- **Choose picture**—Choose an existing picture from the library on the device.

Add a picture

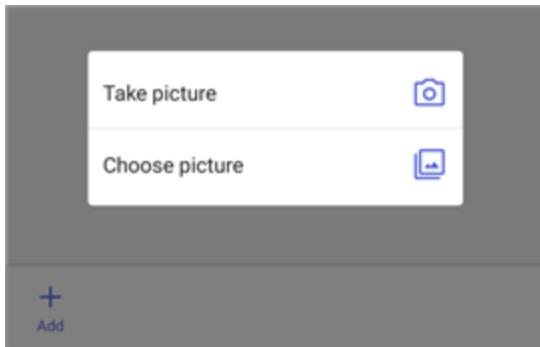
1. Click the **Add** icon to add a picture.



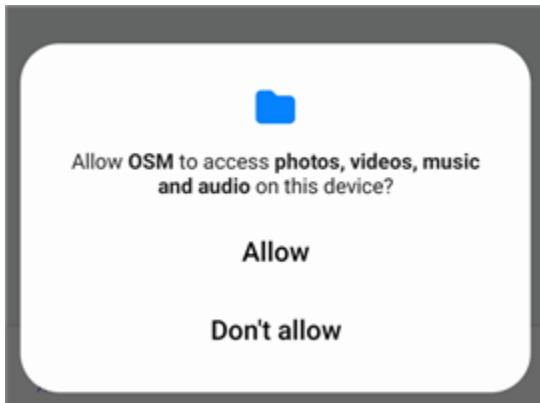
Attachments

The screenshot shows a screen with the message "No attachments added yet". At the bottom is a red-bordered button with a plus sign and the word "Add".

2. Select **Take picture** or **Choose picture**.



A pop-up dialog displays that asks if you **Allow OSM to access photos, videos, music, and audio on this device?**



3. Tap your selection.

- **Allow**—If you select **Allow**, this grants access to media on the device. You will leave the OSM app and go to the camera or photo library on your device. After you take a picture or select a picture you will return to OSM app to the **Attachment Details** screen.
- **Don't allow**—If you select **Don't allow**, the dialog closes and you cannot add a picture.

Note: When you take a photo or choose a picture from the library, the name of the picture and your identity are auto-filled when the picture is added as an attachment. It's not possible change the name of the picture, or the name of the person who added it.

4. (Optional) Add a **Description** if you wish.

5. Tap **Add attachment**.

Attachments

Name
Screenshot_20230824_104021_OSM.jpg

Description
pump

Added by
[Redacted]

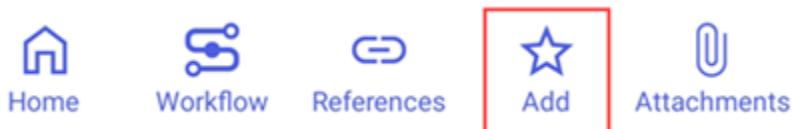
[Cancel](#) [Add attachment](#)

Other actions on page

- [Home](#)—Always returns you to the home page for the application.
- [Workflow](#)—Tap to perform workflow.
- [References](#)—Tap to view references for the isolation list.
- [Add](#)—Tap to add the isolation list to your **My work** list.
- [Attachments](#)—Tap to view and add attachments.

Add isolation list to My work

- Tap **Add** on the lower toolbar of an isolation list to add the isolation list to **My work**.



The star icon turns blue. The isolation list is added to your list.



Remove isolation list from My Work

1. Open an isolation list.
2. Tap **Remove** to remove the isolation list from your **My work** list. The star icon changes to an unfilled star.



Home



Workflow



References



Remove



Attachments

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(core-js 2.5.7)

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(sn-2-ui-router-ng2 7.0.0, ui-router/core 6.0.5)

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(angular-ui-tree/angular-ui-tree 2.22.1)

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(hammer.js 2.0.8)

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(jQuery Mousewheel 3.1.13, Lodash 4.17.21)

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(@uirouter/angularjs 1.0.26)

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Please note: As this software is distributed in Quebec, Canada, some of the clauses in this agreement are provided below in French.

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Cette limitation concerne :

tout ce qui est relié au logiciel, aux services ou au contenu (y compris le code) figurant sur des sites Internet tiers ou dans des programmes tiers ; et les réclamations au titre de violation de contrat ou de garantie, ou au titre de responsabilité stricte, de négligence ou d'une autre faute dans la limite autorisée par la loi en vigueur.

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EFFET JURIDIQUE. Le présent contrat décrit certains droits juridiques. Vous

pourriez avoir d'autres droits prévus par les lois de votre pays. Le présent contrat ne modifie pas les droits que vous confèrent les lois de votre pays si celles-ci ne le permettent pas.

Microsoft OpenXML SDK License

(Entity Framework 6.2.0, Entity Framework 6.2.0-beta1)

MICROSOFT SOFTWARE LICENSE TERMS

OPEN XML FORMAT SOFTWARE DEVELOPMENT KIT (SDK)

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- * updates,
- * supplements,
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i. Right to Use and Distribute. The file listed below is

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* Distributable Code: DocumentFormat.OpenXml.dll

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* Third Party Distribution. You may permit distributors of your programs to copy and distribute the Distributable Code as part of those programs.

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* require distributors and external end users to agree to terms that protect it at least as much as this agreement;

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* Limitation on and Exclusion of Remedies and Damages. You can recover from Microsoft and its suppliers only direct damages up to U.S. \$5.00. You cannot recover any other damages, including consequential, lost profits, special, indirect or incidental damages.

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* claims for breach of contract, breach of warranty, guarantee or

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Please note: As this software may be distributed in Quebec, Canada, some of the clauses in this agreement are provided below in French.

Remarque : Ce logiciel etant distribue au Quebec, Canada, certaines des clauses dans ce contrat sont fournies ci-dessous en francais.

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LIMITATION DES DOMMAGES-INTERETS ET EXCLUSION DE RESPONSABILITE POUR LES DOMMAGES. Vous pouvez obtenir de Microsoft et de ses fournisseurs une indemnisation en cas de dommages directs uniquement a hauteur de 5,00 \$ US. Vous ne pouvez pretendre a aucune indemnisation pour les autres dommages, y compris les dommages speciaux, indirects ou accessoires et pertes de benefices.

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si celles-ci ne le permettent pas.

Microsoft Public License

(Ninject OWIN host for WebApi 2 3.3.0, Ninject.Web.Common.OwinHost 3.3.1, Ninject.Web.WebApi 3.3.0)

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Oracle License and Services Agreement
(ODP.NET, Managed Driver - Official 23.6.0)
ORACLE LICENSE AND SERVICES AGREEMENT

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* disclose results of any program benchmark tests without Oracle's prior written consent.

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Oracle warrants that programs will substantially operate as described in the

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- * gives the Provider the information, authority, and assistance the Provider needs to defend against or settle the claim.

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For purposes of the ordering document, technical support consists of Software Updates, Product Support and/or other annual technical support services you may have ordered. If ordered, annual technical support is provided under Oracle's technical support policies in effect at the time the services are provided. The technical support policies, incorporated in this agreement, are subject to change and may contain additional terms, and you should review the policies prior to entering into the ordering

document for the applicable services. You may access the current version of the technical support policies at

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for the initial two renewal years the technical support fee will not increase by more than 4% over the prior year's fees. If your order is fulfilled by a member of Oracle's partner program, the technical support fee for the first renewal year will be the price quoted to you by your partner; the technical support fee for the second renewal year will not increase by more than 4% over the prior year's fees. If you desupport a subset of licenses in a license set, you may be required to terminate those licenses.

Any cancellation of support may result in the re-pricing of support for your remaining licenses.

Oracle reserves the right to desupport its programs. You will be notified in advance when a program is being desupported.

Such desupport notices, which are posted at Oracle's customer support web site, MetaLink (or Oracle's then current customer support web site), contain desupport dates, information about availability of Extended Assistance Support and Extended Maintenance Support and information about migration paths for certain features.

The desupport notices are subject to change;
Oracle will provide updated desupport notices on MetaLink (or Oracle's then
current customer support web site) as necessary.

GENERAL

End of Agreement

If you breach the terms of this agreement and fail to correct the breach within
30 days after Oracle notifies you in writing,
Oracle may end this agreement and your use of programs and/or services ordered.
If Oracle ends this agreement as specified
in the preceding sentence, you must pay within 30 days all amounts which have
accrued prior to the end of this agreement, as
well as all sums remaining unpaid for programs ordered and/or services received
under this agreement. You agree that if you
are in default under this agreement, you may not use those programs and/or
services ordered. You further agree that if you
have used an OFD agreement to pay for the fees due under an order and you are in
default under the OFD agreement related to
that order, you may not use the programs and/or services ordered.

Fees and Taxes

All fees payable to Oracle are due within 30 days from the invoice date, and you
also agree to pay any sales, value-added or
other similar taxes imposed by applicable law which Oracle must pay based on the
programs or services you ordered. Fees
listed in this agreement are exclusive of value added tax and/or similar sales
taxes. Such taxes shall be charged at the
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By virtue of this agreement, the parties may have access to information that is
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A party's confidential information shall not include information that: (a) is or
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possession prior to the disclosure and had not been
obtained by the other party either directly or indirectly from the disclosing

party; (c) is lawfully disclosed to the other party by a third party without restriction on the disclosure; or (d) is independently developed by the other party.

The parties agree to hold each other's confidential information in confidence for a period of three years from the date of disclosure. The parties agree, unless required by law, not to make each other's confidential information available in any form to any third party for any purpose other than the implementation of this agreement. Each party agrees to take all reasonable steps to ensure that confidential information is not disclosed or distributed by its employees or agents in violation of the terms of this agreement. Nothing shall prevent either party from disclosing the terms or pricing under this agreement or orders submitted under this agreement in any legal proceeding arising from or in connection with this agreement.

Entire Agreement

You agree that this agreement and the information which is expressly incorporated into this agreement (including reference to information contained in a URL), together with the applicable order, are the complete agreement for the programs and services ordered by you, and this agreement supersedes all prior or contemporaneous agreements or representations regarding such programs and/or services. If any term of this agreement is found to be invalid or unenforceable, the remaining provisions will remain effective. It is expressly agreed that the terms of this agreement and any Oracle ordering document shall supersede the terms in any purchase order or other non-Oracle ordering document and no terms included in any such purchase order or other non-Oracle ordering document shall apply to the programs and/or services ordered.

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by authorized representatives of you and of Oracle and any notice required under this agreement shall be provided to the other party in writing.

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NEITHER PARTY SHALL BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, OR

CONSEQUENTIAL DAMAGES, OR ANY LOSS OF PROFITS, REVENUE, DATA, OR DATA USE.

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MAXIMUM LIABILITY FOR ANY DAMAGES UNDER THIS AGREEMENT AND YOUR ORDER, WHETHER IN CONTRACT OR TORT, SHALL BE LIMITED TO THE FEES YOU PAID ORACLE FOR THE DEFICIENT PROGRAM OR SERVICE UNDER THIS AGREEMENT AS SPECIFIED IN YOUR ORDER. IN NO EVENT SHALL ORACLE'S LIABILITY ARISING UNDER OR IN CONNECTION WITH THIS AGREEMENT EXCEED THE TOTAL VALUE OF YOUR ORDER.

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You agree that U.S. export control laws and other applicable export and import laws govern your use of the programs, including technical data; additional information can be found on Oracle's Global Trade Compliance web site located at <http://www.oracle.com/products/export/index.html?content.html>. You agree that neither the programs nor any direct product thereof will be exported, directly, or indirectly, in violation of these laws, or will be used for any purpose prohibited by these laws including, without limitation, nuclear, chemical, or biological weapons proliferation.

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This agreement is governed by the substantive and procedural laws of California and you and Oracle agree to submit to the exclusive jurisdiction of, and venue in, the courts in San Francisco, San Mateo, or Santa Clara counties in California in any dispute arising out of or relating to this agreement.

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You may not assign this agreement or give or transfer the programs and/or any services ordered or an interest in them to another individual or entity. If you grant a security interest in the programs and/or any services, the secured party has no right to use or transfer the programs and/or any services, and if you decide to lease or finance your acquisition of the programs and/or any services, you will follow Oracle's policies regarding financing and

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To fully understand your license grant, you need to review the definition for the licensing metric and term designation as well as the licensing rules which are listed below.

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Marketplace license, regardless of whether any such auction results in a purchase order, provided that an auction resulting in a purchase order shall only be counted against the Annual Transaction Volume once.

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Applications National Language Support (NLS) Supplement CD Packs: Please be advised that only a subset of the products included on an Applications NLS Supplement CD Pack have been translated.

For existing supported customers,

MetaLink has information on which products have been translated for the supported languages (<http://metalink.oracle.com>).

For new or unsupported customers, please contact your Oracle Account Manager for this information.

Application User, Field Sales User, Financials User, Inventory/Shipping User, Marketing User, Manufacturing User,

Telesales User: is defined as an individual authorized by you to use the applicable licensed application programs which are installed on a single server or on multiple servers regardless of whether the individual is actively using the programs at any given time.

Application Read-Only User: is defined as an individual authorized by you to run only queries or reports against the following application programs for which you have also acquired non-read only application user licenses: Financials, Purchasing, Project Costing, Sales Contracts, Service Contracts, Project Contracts, Discrete Manufacturing and Process Manufacturing.

Case Report Form (CRF) Page: is defined as the "electronic equivalent" of what would be the total number of physical paper pages initiated remotely by the program (measured explicitly in the program as Received Data Collection Instruments) during a 12 month period. You may not exceed the licensed number of CRF Pages during any 12 month period unless you acquire additional CRF Page licenses from Oracle.

Compensated Individual: is defined as an individual whose compensation or compensation calculations are generated by the programs. The term Compensated Individual includes, but is not limited to, your employees, contractors, retirees, and any other Person.

Computer: is defined as the computer on which the programs are installed. A Computer license allows you to use the licensed program on a single specified computer.

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Electronic Order Line: is defined as the total number of distinct order lines entered electronically into the Oracle Order Management, Purchasing or iStore application from any source (not manually entered by licensed Order Management Users,

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Employee: is defined as an active employee of yours. (note: The value of these applications is determined by the size of the active employee population and not the number of actual users. Therefore, all of your active employees must be included in your order when licensing these applications.)

Employee User: is defined as an individual authorized by you to use the application programs which are installed on a single server or multiple servers, regardless of whether or not the individual is actively using the programs at any given time. Your human resource personnel that require access to the Oracle Self Service Human Resources program may not be licensed as

Employee Users, but must be licensed as Professional Users. Additionally, your technical support personnel that require access to the Oracle iSupport program may not be licensed as Employee Users, but must be licensed as Professional Users.

Expense Report: is defined as the total number of expense reports processed by Internet Expenses during a 12 month period.

You may not exceed the licensed number of expense reports during any 12 month period.

Field Technician: is defined as an engineer, technician, representative, or other person who is dispatched by you, including the dispatchers, to the field using the programs.

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Full Time Equivalent (FTE) Student: is defined as any full-time student enrolled in your institution and any part-time student enrolled in your institution counts as 25% of an FTE Student. The definition of "full-time" and "part-time" is based on your policies for student classification. If the number of FTE Students is a fraction, that number will be rounded to the nearest whole number for purposes of license quantity requirements.

Hosted Named User: is defined as an individual authorized by you to access the hosted service, regardless of whether the individual is actively accessing the hosted service at any given time.

iLearning Subscription: is defined as a web based learning environment that is made available to you subject to the terms of this agreement and Oracle's iLearning Subscription Policies. Oracle's iLearning Subscription Policies are located at <http://oracle.com/policies/ilerningpolicy.html>, and may be updated by Oracle from time to time without notice to you.

Implementation Services, Packaged Methods, Architecture Services, Accelerator Services, Assessment Services and Workshops

Each Implementation Service, Packaged Method, Architecture Service, Accelerator Service, Assessment Service and

Workshop is provided subject to the statement of obligation for that particular offering and Oracle's consulting services policies. Oracle's consulting services policies are located at www.oracle.com/consulting/policies/index.html?content.html, and are subject to change.

Invoice Line: is defined as the total number of invoice line items processed by the program during a 12 month period. You may not exceed the licensed number of Invoice Lines during any 12 month period unless you acquire additional Invoice Line licenses from Oracle.

Learning Credits: may be used to acquire education products (excluding Oracle Tutor, Oracle iLearning and Oracle iLearning Subscription) and services, at the list price and under the terms specified in the Oracle University online catalogue, posted at www.oracle.com/education, at the time such products or services are ordered. A Learning Credit is valid for 12 months from the date the Learning Credit is ordered, and may only be used in the country where it was acquired. Any unused Learning Credit will expire at the end of the term. You may be required to execute standard Oracle ordering materials when using a Learning Credit to order education products or services.

\$M in Managed Assets: is defined as one million U.S. dollars of the following total: (1) Book value of investment in capital leases, direct financing leases and other finance leases, including residuals, whether owned or managed for others, active on the program, plus (2) Book value of assets on operating leases, whether owned or managed for others, active on the program,

plus (3) Book value of loans, notes, conditional sales contracts and other receivables, owned or managed for others, active on the program, plus (4) Book value of non earning assets, owned or managed for others, which were previously leased and active on the program, including assets from term terminated leases and repossessed assets, plus (5) Original cost of assets underlying leases and loans, originated and active on the program, then sold within the previous 12 months.

Module: is defined as each production database running the programs.

Named User Plus: is defined as an individual authorized by you to use the programs which are installed on a single server or multiple servers, regardless of whether the individual is actively using the programs at any given time. A non human operated device will be counted as a named user plus in addition to all individuals authorized to use the programs, if such devices can access the programs. If multiplexing hardware or software (e.g., a TP monitor or a web server product) is used, this number must be measured at the multiplexing front end. Automated batching of data from computer to computer is permitted. You are responsible for ensuring that the named user plus per processor minimums are maintained for the programs contained in the user minimum table in the licensing rules section; the minimums table provides for the minimum number of named users plus required and all actual users must be licensed.

Non Employee User - External: is defined as an individual, who is not your employee, contractor or outsourcer, authorized by you to use the application programs which are installed on a single server or multiple servers, regardless of whether or not the individual is actively using the programs at any given time.

OFD Agreement: is an agreement between you and Oracle (or one of Oracle's affiliates) that provides for payments over time of some or all of the sums due under your order.

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Oracle Learning Network (OLN): OLN is a web based learning environment that is made available to you subject to the terms of this agreement and Oracle's OLN Hosting Access Policies. Oracle's OLN Hosting Access Policies are located at www.oracle.com/education/oln/index.html?oln_policies.html, and may be updated by

Oracle from time to time without notice
to you.

Order Line: is defined as the total number of order entry line items processed by
the program during a 12 month period.

Multiple order entry line items may be entered as part of an individual customer
order or quote and may also be automatically
generated by the Oracle Configurator. You may not exceed the licensed number of
Order Lines during any 12 month period
unless you acquire additional Order Line licenses from Oracle.

Order Management User: is defined as an individual authorized by you to use the
applicable licensed application programs
which are installed on a single server or on multiple servers regardless of
whether the individual is actively using the programs
at any given time. Order Management Users are allowed to manually enter orders
directly into the programs but any orders
entered electronically from other sources must be licensed separately.

Orders: is defined as the total number of distinct orders for all programs that
are a part of Electronic Orders, entered
electronically (not manually entered by licensed professional users) through EDI,
XML or other electronic means including
purchase orders transmitted from Oracle Purchasing, during a 12 month period. You
may not exceed the licensed number of
orders during any 12 month period.

Person: is defined as your employee or contractor who is actively working on
behalf of your organization or a former
employee who has one or more benefit plans managed by the system or continues to
be paid through the system. For Time and
Labor, a person is defined as an employee or contractor whose time or labor
(piece work) or absences are managed by the
system. For Project Resource Management, a person is defined as an individual who
is scheduled on a project. The total
number of licenses needed is to be based on the peak number of part-time and
full-time people whose records are recorded in
the system.

Ported Number: is defined as the telephone number that end users retain as they
change from one service provider to
another. This telephone number originally resides on a telephone switch and is
moved into the responsibility of another

telephone switch.

Primary Usage: is defined as each Application User of the following applications: Financials, Discrete Manufacturing, Process Manufacturing, Project Costing and Purchasing. Each such Application User is counted only once based on primary usage. You must specify how many Application Users you are licensing for each application. Primary Usage of one of the applications listed above provides the Application User with the right to use any or all of the other application programs listed above for which you are licensed. Primary Usage does not provide you with the right to use other application programs including the extensions or options to the application programs listed above.

Processor: shall be defined as all processors where the Oracle programs are installed and/or running. Programs licensed on a Processor basis may be accessed by your internal users (including agents and contractors) and by third party users. For the Healthcare Transaction Base program, only the processors on which Internet Application Server (Standard Edition and/or Enterprise Edition) and this program are installed and/or running are counted for the purpose of determining the number of licenses required. For the iSupport, iStore and Configurator programs, only the processors on which Internet Application Server (Standard Edition and/or Enterprise Edition) and the licensed program are running are counted for the purpose of determining the number of licenses required for the licensed program; under these licenses you may also install and/or run the licensed program on the processors where a licensed Oracle Database (Standard Edition and/or Enterprise Edition) is installed and/or running.

Professional User: is defined as an individual authorized by you to use the application programs which are installed on a single server or multiple servers, regardless of whether or not the individual is actively using the programs at any given time.

For the purposes of Order Management, Advanced Pricing and Purchasing, Professional Users are allowed to manually enter orders directly into these programs but any orders transmitted or executed electronically (via EDI, XML or other electronic means including purchase orders transmitted from Oracle Purchasing) must be

licensed separately.

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Professional User - External : is defined as an individual, who is not your employee, contractor or outsourcer, authorized by you to use the application programs which are installed on a single server or multiple servers, regardless of whether or not the individual is actively using the programs at any given time. For the purposes of Order Management, Advanced Pricing and

Purchasing, Professional Users - External are allowed to manually enter orders directly into these programs but any orders transmitted or executed electronically (via EDI, XML or other electronic means including purchase orders transmitted from Oracle Purchasing) must be licensed separately.

Professional User 2003: is defined as an individual authorized by you to use the application programs which are installed on a single server or multiple servers, regardless of whether or not the individual is actively using the programs at any given time.

Professional Users are allowed to manually enter orders directly into the programs but any orders entered electronically from other sources must be licensed separately.

Professional User 2003 - External: is defined as an individual, who is not your employee, contractor or outsourcer, authorized by you to use the application programs which are installed on a single server or multiple servers, regardless of whether or not the individual is actively using the programs at any given time.

Professional Users are allowed to manually enter orders directly into the programs but any orders entered electronically from other sources must be licensed separately.

Program Documentation: is defined as the program user manual and program installation manuals.

Purchase Line: is defined as the total number of purchase line items processed by the application during a 12 month period.

Multiple purchase lines may be created on either a requisition or purchase order or may be automatically generated by other

Oracle Application programs. For iProcurement, Purchase Lines are counted as all line items on an approved requisition created in iProcurement. For Purchasing Intelligence, Purchase Lines are counted as the line items on purchase orders

processed through this application. This does not include communication on the same purchase order. For each application, you may not exceed the licensed number of Purchase Lines during any 12 month period unless you acquire additional Purchase Line licenses from us. You may acquire a different number of Purchase Line licenses for each program (the number of Purchase Lines for iProcurement could be a smaller number than for Purchasing Intelligence).

Purchasing User: is defined as an individual authorized by you to use the applicable licensed application programs which are installed on a single server or on multiple servers regardless of whether the individual is actively using the programs at any given time. Purchasing Users are allowed to manually enter orders directly into the programs but any orders entered electronically from other sources must be licensed separately.

\$M in Revenue: is defined as one million U.S. dollars in all income (interest income and non interest income) before adjustments for expenses and taxes generated by you during a fiscal year.

RosettaNet Partner Interface Processes® (PIPs®): are defined as business processes between trading partners.

Preconfigured system-to-system XML-based dialogs for the relevant E-Business Suite Application(s) are provided. Each preconfigured PIP includes a business document with the vocabulary and a business process with the choreography of the message dialog.

Service Order Line: is defined as the total number of service order entry line items processed by the program during a 12 month period. Multiple service order entry line items may be entered as part of an individual customer service order or quote.

You may not exceed the licensed number of Service Order Lines during any 12 month period unless you acquire additional

Service Order Line licenses from Oracle.

Subscriber: is defined as (a) a working telephone number for all wireline devices; (b) a portable handset or paging device that has been activated by you for wireless communications and paging; (c) a residential drop or a nonresidential device serviced by a cable provider; or (d) a live connected utility meter. The total number of Subscribers is equal to the aggregate of all types

of Subscribers. If your business is not defined in the primary definition of Subscriber above, Subscriber is defined as each U.S. \$1,000 increment of your gross annual revenue as reported to the SEC in your annual report or the equivalent accounting or reporting document.

Suite: is defined as all the functional software components described in the product documentation.

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Technical Reference Manuals

Technical Reference Manuals ("TRMs") are Oracle's confidential information. You shall use the TRMs solely for your internal data processing operations for purposes of: (a) implementing applications programs, (b) interfacing other software and hardware systems to the applications programs and (c) building extensions to applications programs. You shall not disclose, use or permit the disclosure or use by others of the TRMs for any other purpose. You shall not use the TRMs to create software that performs the same or similar functions as any of Oracle products. You agree: (a) to exercise either at least the same degree of care to safeguard the confidentiality of the TRMs as you exercise to safeguard the confidentiality of your own most important confidential information or a reasonable degree of care, whichever is greater; (b) to maintain agreements with your employees and agents that protect the confidentiality and proprietary rights of the confidential information of third parties such as Oracle and instruct your employees and agents of these requirements for the TRMs; (c) restrict disclosure of the TRMs to those of your employees and agents who have a "need to know" consistent with the purposes for which such TRMs were disclosed; (d) maintain the TRMs at all times on your premises; and (e) not to remove or destroy any proprietary or confidential legends or markings placed upon the TRMs. Oracle shall retain all title, copyright and other proprietary rights in the TRMs. TRMs are provided to you "as-is" without any warranty of any kind. Upon termination, you shall cease using, and shall return or destroy, all copies of the applicable TRMs.

Trainee: is defined as an employee, contractor, student or other person who is being recorded by the program.

Workstation: is defined as the client computer from which the programs are being accessed, regardless of where the program is installed.

Term Designation

If your program license does not specify a term, the program license is perpetual and shall continue unless terminated as otherwise provided in the agreement.

1, 2, 3, 4, 5 Year Terms: A program license specifying a 1, 2, 3, 4 or 5 Year

Term shall commence on the effective date of

the order and shall continue for the specified period. At the end of the specified period the program license shall terminate.

1 Year Hosting Term: A program license specifying a 1 Year Hosting Term shall commence on the effective date of the

order and shall continue for a period of 1 year. At the end of the 1 year the program license shall terminate. A program license

specifying a 1 Year Hosting Term may only be used for providing internet hosting services.

1 Year Oracle Hosted Term: A program license specifying a 1 Year Oracle Hosted Term shall commence on the effective

date of the order and shall continue for a period of 1 year. At the end of the 1 year the program license shall terminate. A

program license specifying a 1 Year Oracle Hosted Term must be hosted by

Oracle.com via Computer and Administration

services.

1 Year Subscription: A program license specifying a 1 Year Subscription shall commence on the effective date of the order

and shall continue for a period of 1 year. At the end of the 1 year the program license shall terminate.

Licensing Rules

You are responsible for ensuring that the following user minimums and user maximums are maintained per program that you license per named user plus:

Program Named User Plus Minimum

Oracle Database Enterprise Edition 25 Named Users Plus per Processor

Rdb Enterprise Edition 25 Named Users Plus per Processor

CODASYL DBMS 25 Named Users Plus per Processor

Message Broker 10 Named Users Plus per Processor

TopLink 10 Named Users Plus per Processor

Internet Application Server Standard Edition 10 Named Users Plus per Processor

Internet Application Server Enterprise Edition 10 Named Users Plus per Processor

Program Named User Plus Maximum

Personal Edition 1 Named User Plus per database

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You are responsible for ensuring that the following restrictions are not violated:

* Oracle Database Standard Edition may only be used on machines which have the ability to run a maximum of four processors.

* The number of Enterprise Edition option licenses, Enterprise Manager licenses and Rdb Server option licenses must match the number of licenses of the associated database.

* The number of Internet Application Server Enterprise Edition option licenses must match the number of licenses of the associated Internet Application Server.

* Application licensing prerequisites as specified in the Applications Licensing Table located at

<http://oracle.com/corporate/pricing>.

Your license for the Oracle Database includes the right to run the database on an unlicensed spare computer for up to a total of ten separate days in any given calendar year. Any use beyond the right granted in the previous sentence must be licensed separately.

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