Action plan module manual

SAFETYNET
by FRONTAVENUE

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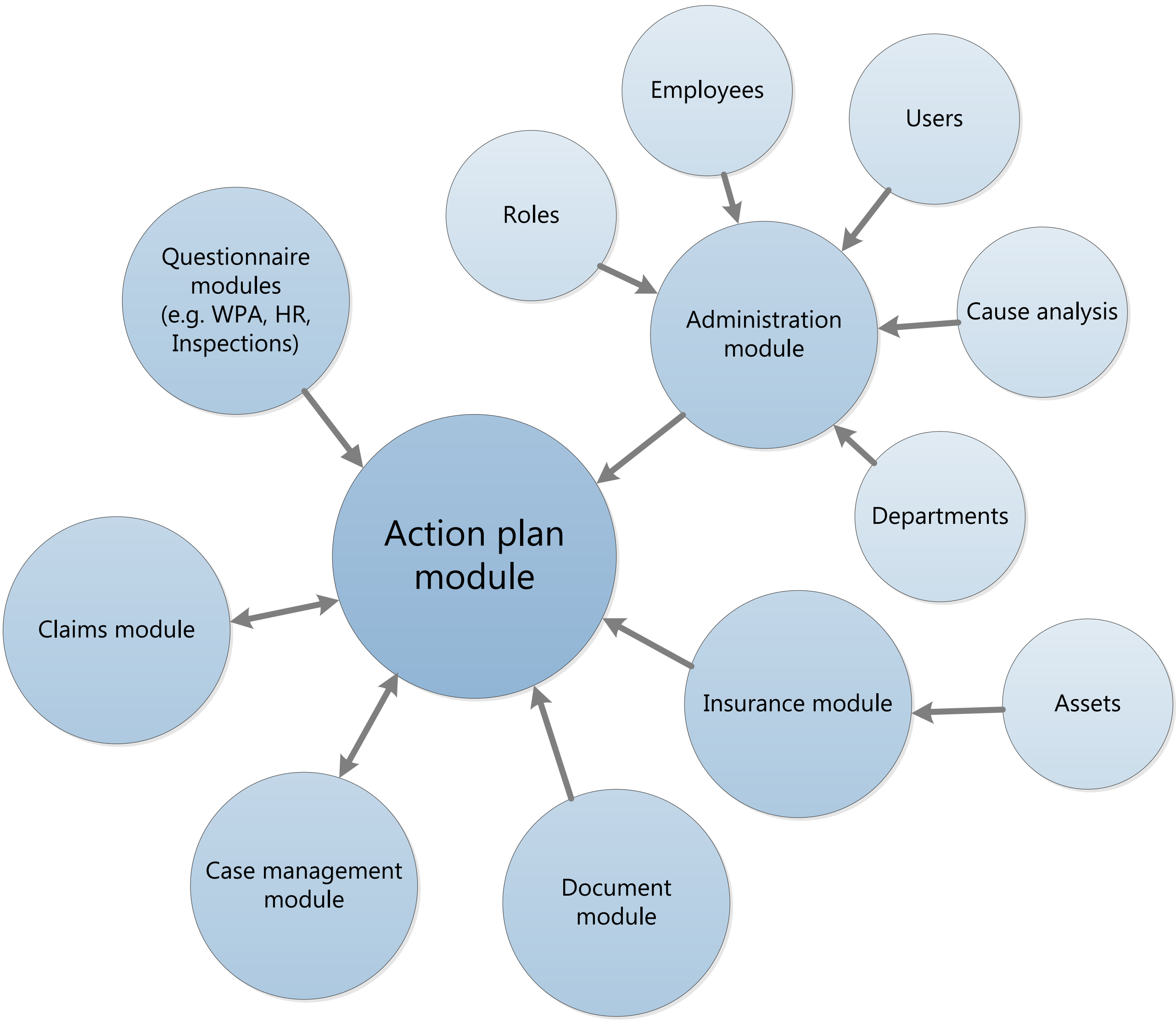
INTRODUCTION

In the action plan module, you can create action plans and issues. As is implied by the wording, an issue is simply a registration of an issue, whereas an action plan is a plan for how to act on an issue.

Such issues can be identified in many other parts of SafetyNet, and therefore, an action plan can be created from other modules such as Case Management, Claims and questionnaire modules such as WPA, HR and Inspections. The action plan module also gets information from the administration module, the document module and the insurance module.

In the flowchart below, you can see how information from other modules in SafetyNet is centralized in the action plan module – *the arrow points in the direction information is sent to*:



ICONS

and	Reopen
and	Open and minimize
	Save and leave page
	Leave the page without saving
	Save
and	Further information
and	Edit
	Add
and	Create new
	Deadline passed
	Attach file
and	Delete
	Search
	Reset
	Open risk assessment
	Update

	Copy
and	Export to or merge in PDF
, and	Export to or merge in Excel
and	Export to or merge in Word file
	Archive
	Print
	Select language
	Redirect to front page
	Changing the same field of the selected questionnaires
and	Favorites and add favorite
	Export to graph
	Create with the help of a follow guide or import
	Upgrade an issue to an action plan, and if it is already an action plan, upgrade it to a master
	Downgrade an action plan to an issue
	Cause analysis
	Help
	There is a relation to a case, an answer or an action plan/issue

MENU

In "Tasks", you can see all you the tasks you are responsible for across different action plans, e.g. short term solution, long term solution and follow-up.

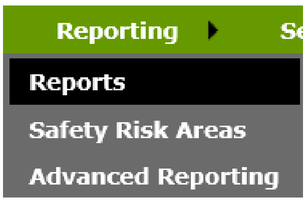
Read more on page 38.

In "Issues", you can create new issues and access existing issues.

Read more on page 7 and 33.

In "Action Plans", you can create new action plans and access existing action plans.

Read more on page 7 and 33.



In "Reports", you can download PDF reports with information from the action plan module.

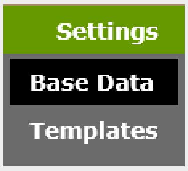
Read more on page 30.

In "Safety Risk Areas", you get an overview of how many action plans and issues are registered under different risk areas and under different line of business.

Read more on page 31.

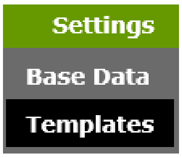
In "Advanced Reporting", you can get Excel reports with information from the action plan module. You can also get these reports as graphs.

Read more on page 27.



In "Base Data", you can create and edit base data for the action plan module, e.g. statuses and categories.

Read more on page 9 to 17.

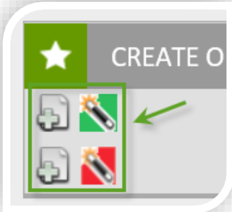


In "templates", you can create and edit email templates and templates for the overview of action plans and issues, e.g. Word and Excel templates.

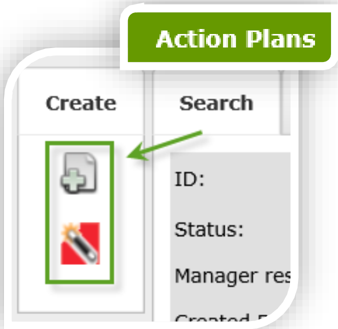
Read more on page 18 and 34.

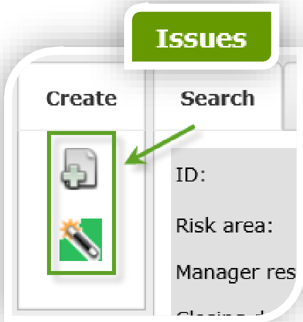
CREATE AND WORK WITH ACTION PLANS/ISSUES

You can create a new action plan or a new issue on the action plan module frontpage where you click on the create icon which is a paper with a plus. You can also use a guide to create by clicking on the wizard icon; the red wizard icon will create a new action plan, and the green wizard icon will create a new issue:

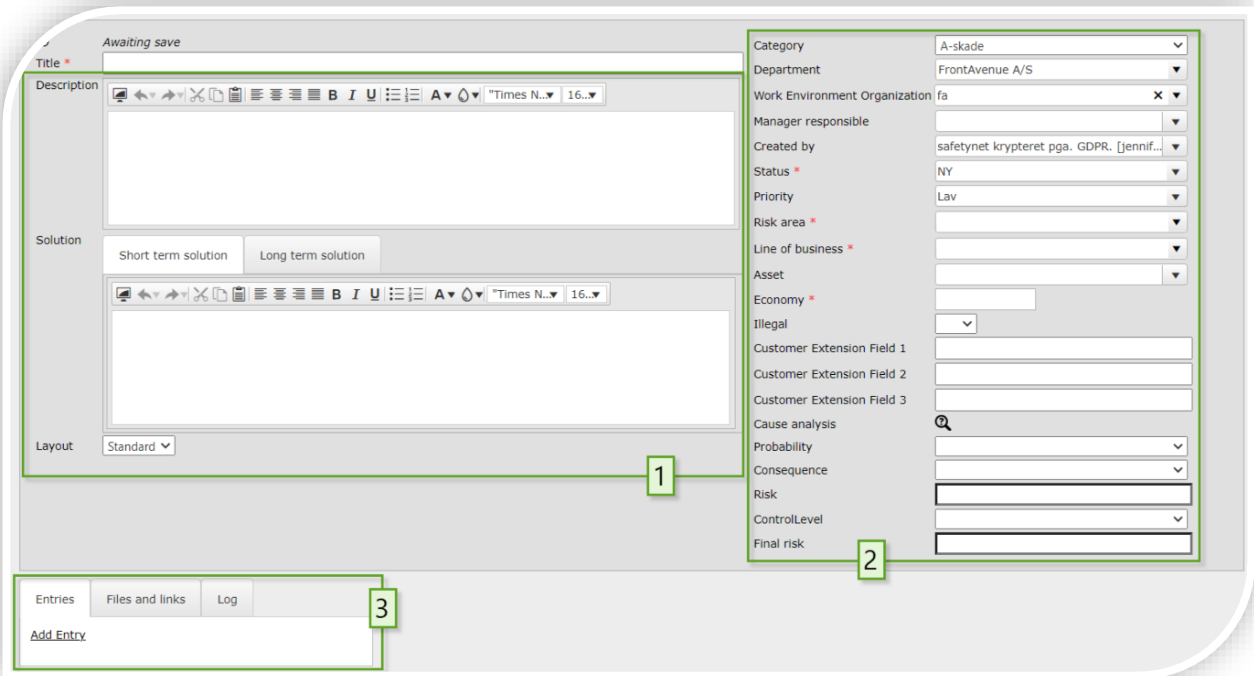


You find the same icons in the overview under "Action plans" and "Issues" in the menu of the action plan module:





If you choose the create icon and not the wizard icon, you will see a setup similar to the one below where you have to fill out all the mandatory fields (* red star) before you save:



1) To the left, you can write longer texts such as describing the issue. You can also go through the phases of your action plan, e.g. short term solution, lon term solution and evaluation. Each phase can have it's own deadline and person responsible.

2) To the right, you can fill out fields. Some fields might help categorize the action plan in different ways to make reports more precise.

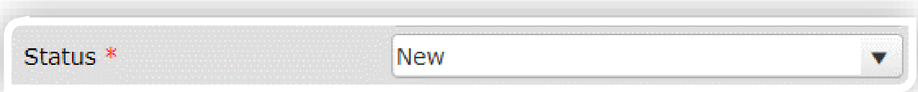
3) In the bottom, you can choose between three tabs:

   a. **Entries:** Here, you can write comments to the action plan/the issue.

   b. **Files and links:** If you have pictures or other files relevant to the action plan/issue, you can upload them here.

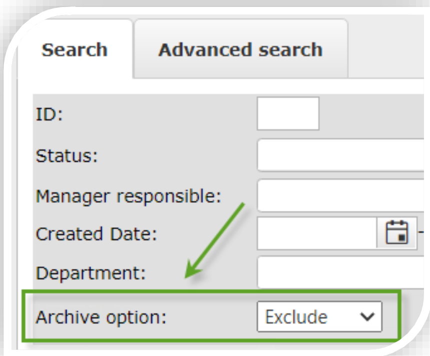
   c. **Log:** Here, you can see when and who have made major changes to the action plan/issue.

Remember to change the status of the action plan/issue as you go so you can keep track of how far you are in the process of solving it:



When you are done with your action plan, and you don't want to see it in your overview anymore, you can achieve it. You do this by clicking on this icon next to the action plan/issue which you wish to achieve:

You can always find the archived action plan/issue again by using this search option:

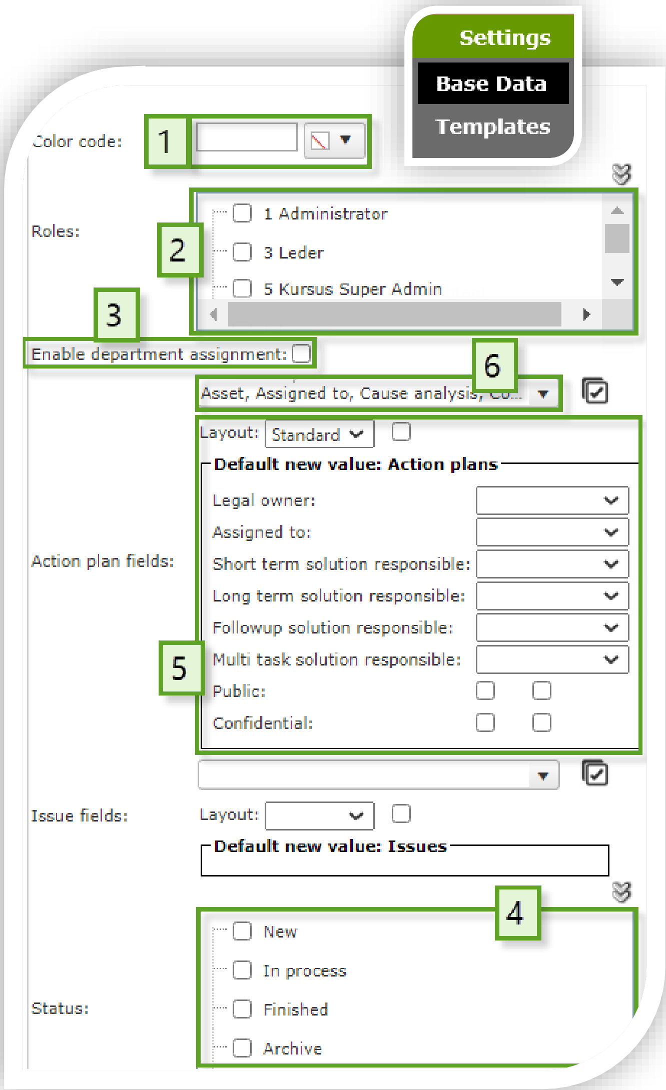


Then you can also reopen it by clicking on this icon:

CREATE CATEGORY

You must create the relevant categories as you cannot save a new action plan and issue without choosing which category it belongs to. There is a number of setting for categories e.g. you might have different fields chosen for different categories.

You can create categories under the tab "Category" under "Settings" > "Base Data" in the menu of the action plan module:



Here, you can choose between the following settings for the category:

1) Color code: Define a color for the category which will be shown in the overview of action plans.

2) Roles: Choose the roles that should have access to action plans/issues with this category.

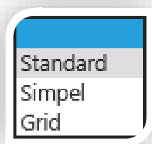
3) Enable department assignment: Check off this box if email notifications should not be sent to an individual, but instead the department. The e-mail address of the relevant departments has to be registered under "Company" > "Company Structure" in the menu of the administration module.

4) Status: Choose the statuses which can be used for this action plan category.

5) Action plan fields – default values: Here, you can set default values for some fields, so these are set automatically when an action plan is created.

The last box next to "Layout", "Public" and "Confidential" will hide these fields.

Layout: You can choose between three type of layouts for the solution:



- **"Standard"** shows solution with tabs such as "Short term", "Long term" and "Evaluation".
- **"Simple"** shows no tabs, but just a simple text box.
- **"Grid"** gives you the option of creating several tasks (see "Task" on page 38).

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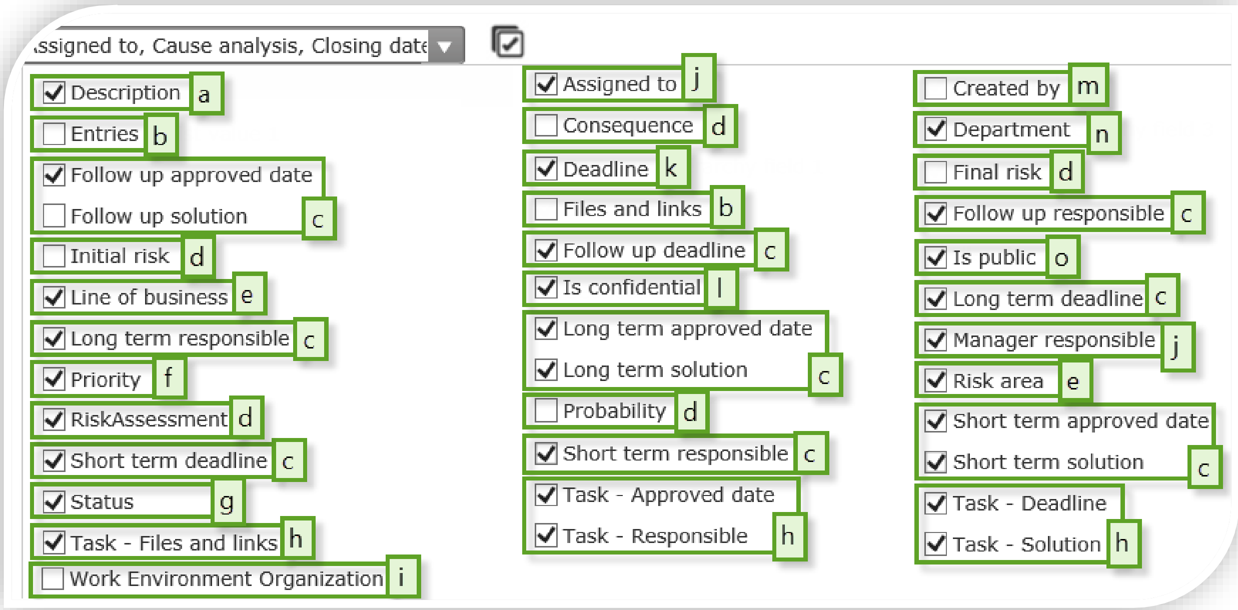
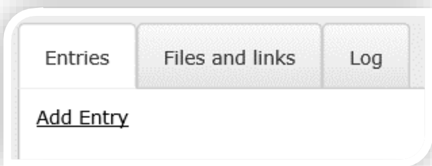
6) Action plan fields - activate: Choose what should be shown for action plans/issues with this category. On these next two pages, you can read about some of the fields you can enable.

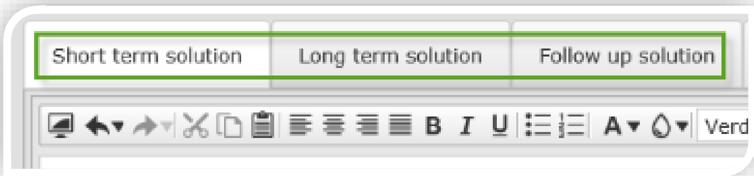


a) Description: This is a central part of the action plan as this is where you write what the purpose of the action plan is.

b) Entries and files and links: At the bottom of the page you can write comments and upload files relevant to the action plan:



c) Short term, long term and follow up: Keep track of the solution process with these three tabs to which you can add deadline, files and a person responsible.



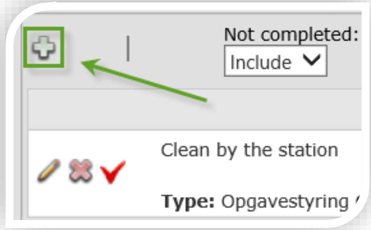
d) Risk assessment, initial risk, consequence, probability, and final risk: Read about these on page 13-16.

e) Line of business and risk area: If these are defined on each action plan, you can get an easy overview what in "Safety Risk Areas" (read more on page 31).

f) Priority: If you set priority, you can see its color in the overview of action plans and easily sort through your action plans (read more on page 17).

g) Status: Use status to keep track of how far you are in the process of working through the action plan (read more on page 12).

h) **Task:** You can keep track of the solution process with as many tasks as you need with this type of solution layout. You create tasks by clicking on the icon of a plus, and you can check them off when they are done. For every task, you can add deadline, files and a person responsible. You can get an overview of all your tasks collectively from different action plans under "Tasks" (see page 38).



i) **Work environment organization:** Here, you can choose what group in the work environment organization the action plan belongs to. You define the work environment organization under "Company" > "Work Environment Organization" in the menu of the administration module.

j) **Assigned to and manager responsible:** Here, you choose what manager and what user is responsible for this action plan. You can set up email notifications for these people (see page 19). The responsible manager has the option of checking off the box called "Inform" which notifies the manager if "assigned to" is changed.

k) **Deadline:** Here, you set a deadline for the action plan, and you can enable an email notification which is triggered by the deadline (see page 19). When the deadline has surpassed, this icon will be shown in the overview:

l) **Is confidential:** If this box is checked off, only people who are directly connected to the action plan can see it no matter role and department.

m) **Created by:** Connect the person who created the action plan to it.

n) **Department:** Since action plans belongs to departments, this field is important to include, and it will often be filled out automatically (read more on page 17).

o) **Is public:** If this box is checked off, the action plan is made public. This means that it will appear on a separate page to which you can get a link and share with the public.

Customer specific fields

Besides the fields mentioned above, you can also get custom made fields. However, there is a limit to how many:

- 5 text fields
- 3 check off boxes
- 3 date fields
- 3 fields with lists organized as a hierarchy
- 3 fields with simple lists

All these extra fields have to be enabled by us at FrontAvenue with instructions from you. If you have had the fields with lists enabled, you can edit the content of the lists under "Settings" in the menu of the administration module.