

# Service Automated Risk Assessment (SARA) Training

Grundfos Service & Solutions

## INTRODUCTION TO SARA

**S.A.R.A.**: Service Automated Risk Assessment or what is the same, Automated Risk Analysis of Service.

It is a Grundfos digital application developed to help the technician or field engineer to assess risks on a customer site through a simple and fast-to-execute methodology.

**Recommended devices:** iPads

**Emerging devices:** iPhones or PC (Resolution Issues)

Benefits of SARA:

- Standardized methodology for risk assessment designed for service technicians/engineers in field activities.
- Immediate result of Approval/denial based on the information released by the technician/engineer.
- Automatic report generation once the evaluation is completed.
- Reduction of administrative tasks by automatically uploading the information in the SAP Service Order.

Other Benefits:

- Reducing the environmental footprint by eliminating the use of paper for manual risk assessments.
- Digital backup of information in SharePoint and SAP. (Traceability)
- Creation of Dashboard for monitoring and making strategic decisions-making based on data.

## HOME PAGE / BASIC INFORMATION ASSISTANCE

Contact with the developers

Exit the app

SIMS app

GRUNDFOS SIMS

S.A.R.A.  
Service Automated Risk Assessment

Country: United States

Language: English

Employee's Full Name: Justin Wall

Employee Number: 54896

Service Order Number: 64833

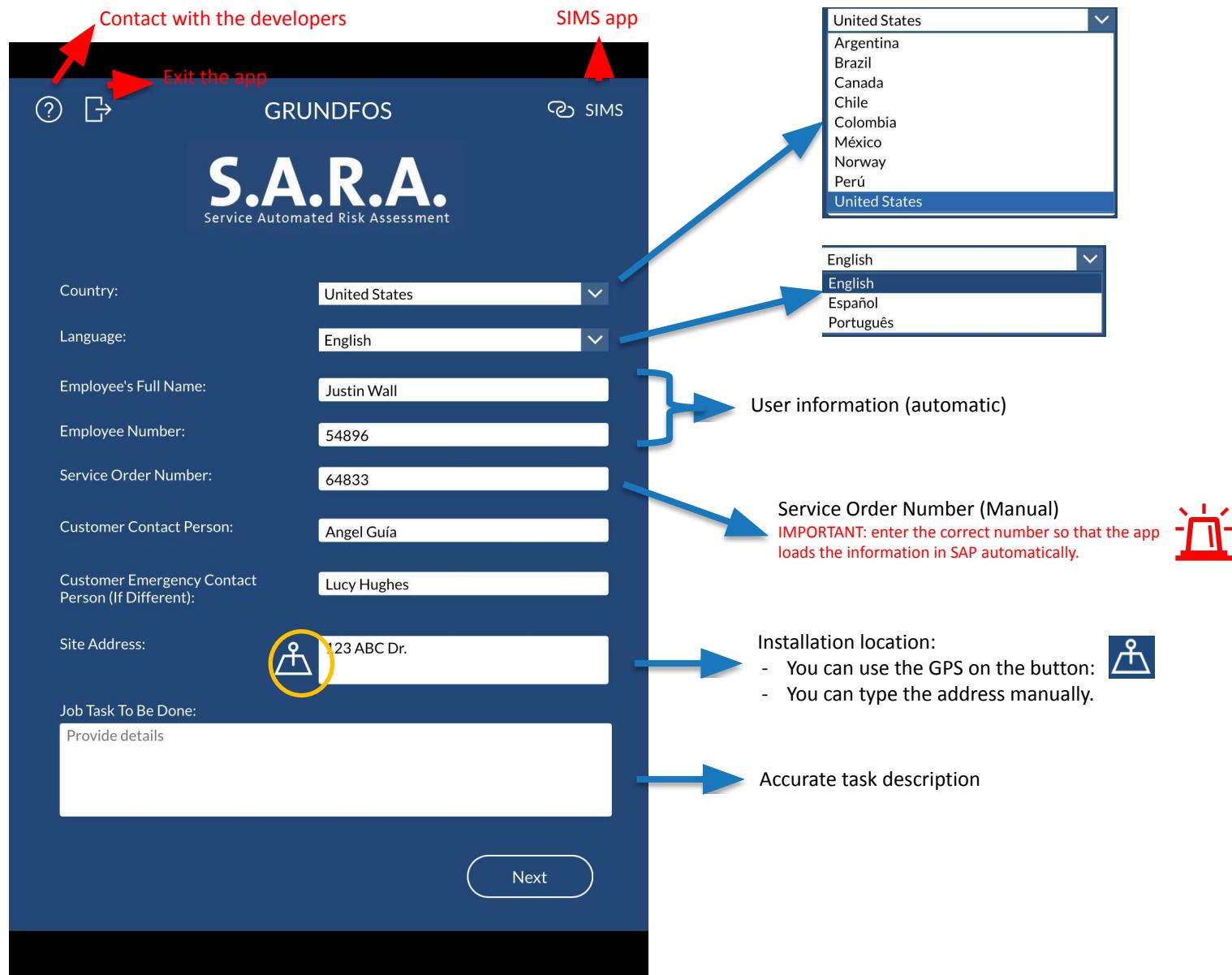
Customer Contact Person: Angel Guía

Customer Emergency Contact Person (If Different): Lucy Hughes

Site Address: 123 ABC Dr. 

Job Task To Be Done:  
Provide details

Next



|               |               |
|---------------|---------------|
| United States | Argentina     |
|               | Brazil        |
|               | Canada        |
|               | Chile         |
|               | Colombia      |
|               | México        |
|               | Norway        |
|               | Perú          |
| United States | United States |

|         |           |
|---------|-----------|
| English | English   |
|         | Español   |
|         | Português |

User information (automatic)

Service Order Number (Manual)  
**IMPORTANT:** enter the correct number so that the app loads the information in SAP automatically.

Installation location:  
- You can use the GPS on the button:  
- You can type the address manually.

Accurate task description

This is the initial screen of SARA where we will load the basic information of the jobsite.

**NOTE:** It is important to correctly enter the Service order number to ensure the automatic loading of the information in SAP.

An appropriate description of the tasks to be performed will help us to understand the context of the work being performed.

# PRE-TASK ANALYSIS

GRUNDFOS SIMS

## Basic Safety Conditions & Permit To Work

First please double check that you have everything you need in order to complete the service task in a safe, professional way. all answers should be based on the actual conditions

Will you carry out lock-out/tag-out before starting the task?

Yes  No  N/A

Do you have all the necessary tools?

Yes  No  N/A

Do you have the necessary competences?

Yes  No  N/A

Do you have all the necessary personal protective equipment?

Yes  No  N/A

Do you have a first aid kit?

Yes  No  N/A

Are covid-19 protocols in place?

Yes  No

Do you have permission from the site/end-user to carry out the job?

Yes  No

[Back](#) [Next](#)

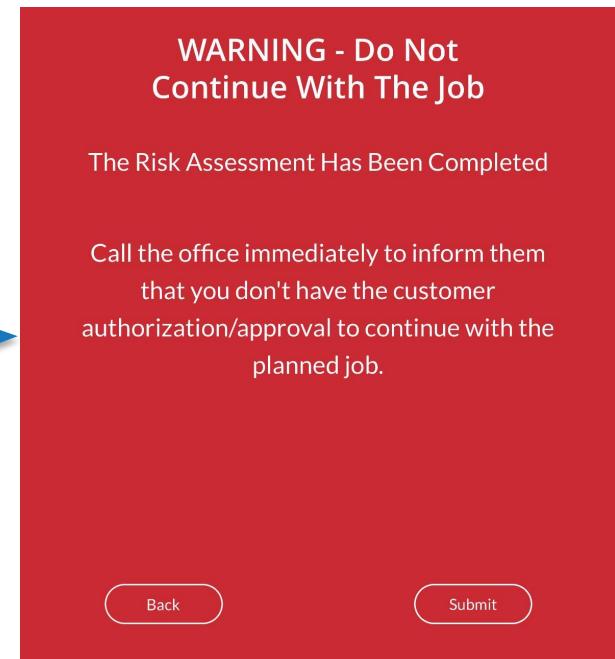
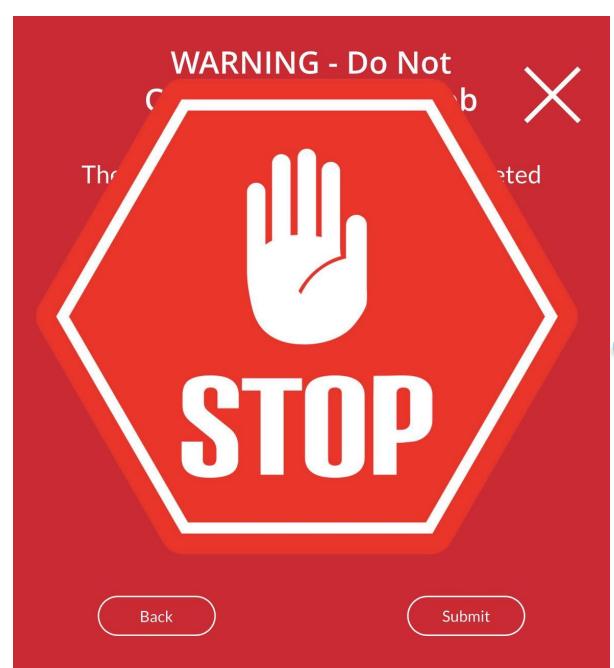
Do you have permission from the site/end-user to carry out the job?

Yes  No

What is preventing you from having permission to do the job?

The installation manager is not present.

[Back](#) [Next](#)

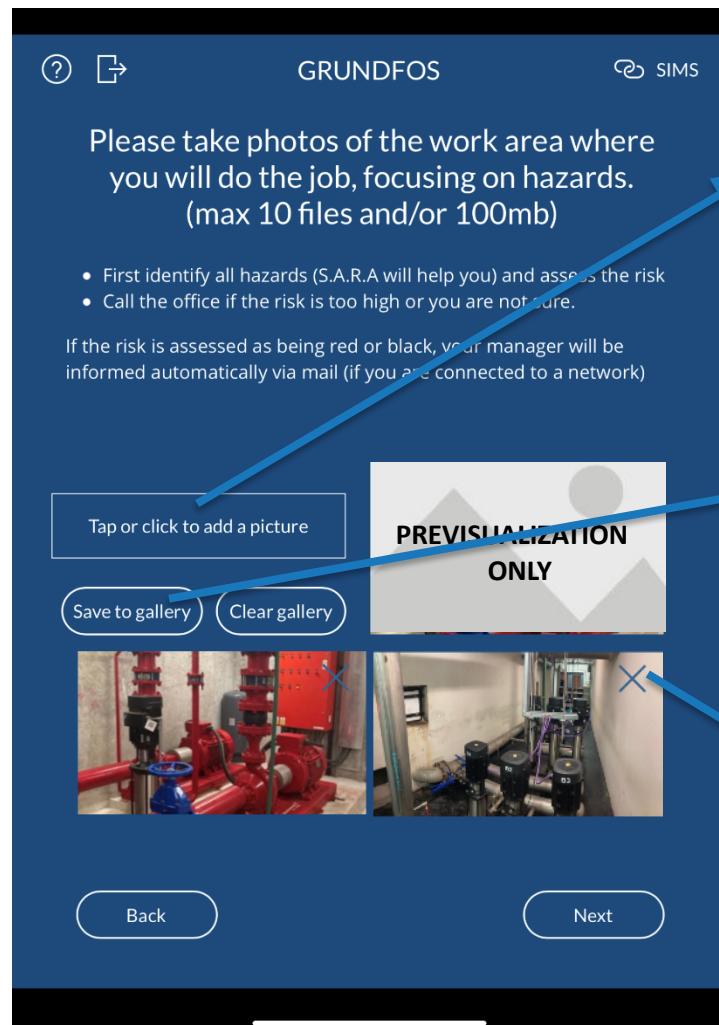


This section evaluates how prepared we are for the work to be performed and whether we have the necessary competency, permits, tooling, etc. to proceed with the scheduled work.

**Note:** It is important to maintain a fluid communication with the office in case of not having the field work permit.

## PHOTOGRAPHIC COMPILATION OF THE INSTALLATION.

In this section, you can attach images of the installation and/or files that you consider pertinent to the risk assessment.



Touch button to select images and/or files you want to upload.

**NOTE:** We recommend you take the photos previously using SARA and then, select from the device storage. That will allow you to decrease the weight of the images and this will let the app create the report faster!

Click this button to confirm the image/file you want to upload.

You can delete the image by pressing the X in the corner.



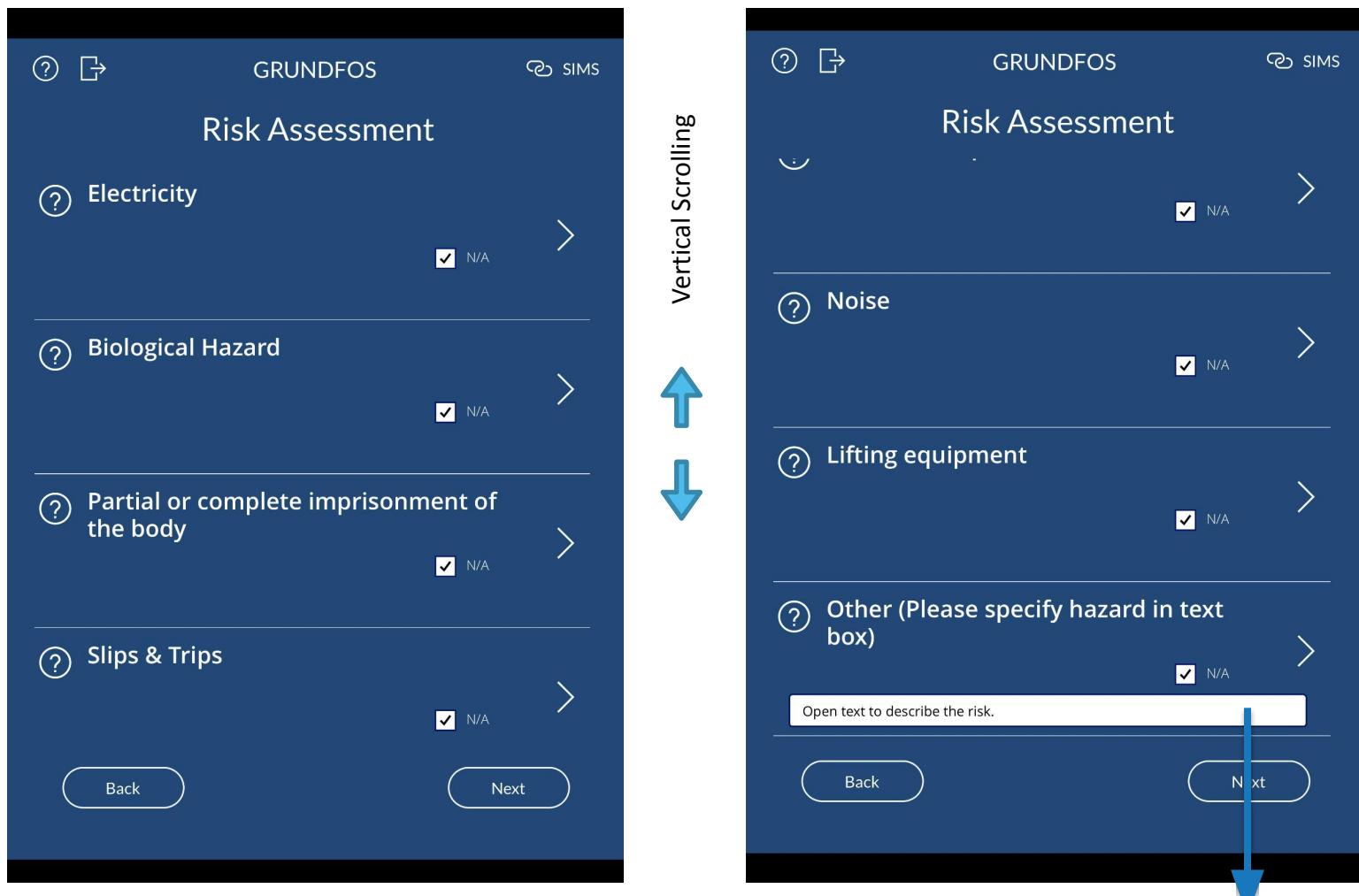
**Note:** The photos that we must take will be mainly regarding the installation and the existing risks in the areas where the work will be carried out.

# ON-SITE RISK ASSESSMENT

In this section we can specifically evaluate the risks we find on site.

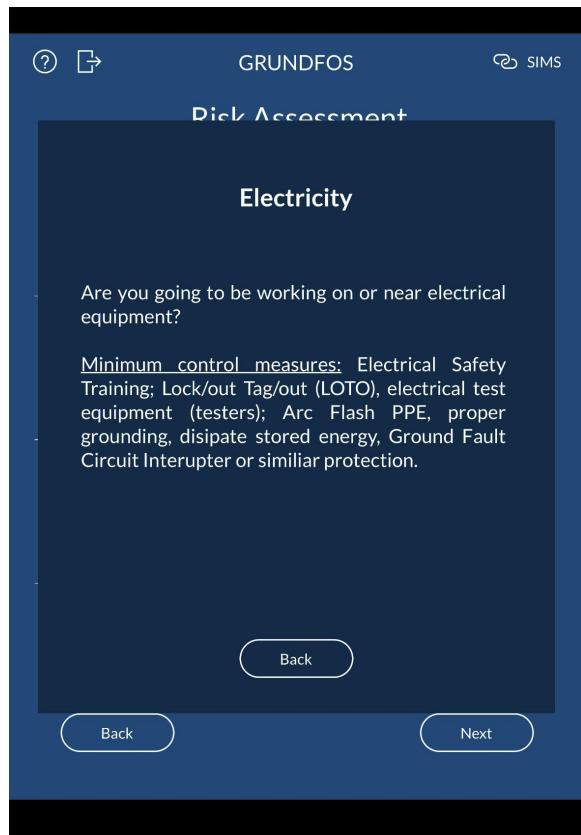
The risks that can be evaluated with SARA are the following:

- Electricity
- Biohazard
- Partial or total imprisonment of the body
- Slips and falls
- Working at heights
- Working in a confined space
- Fixed objects
- Movement of vehicles and/or machinery
- Sharp parts or objects
- Ergonomics 1: difficult working position
- Ergonomics 2: manual handling and use of hand tools
- Pressure by work against the clock
- Pressurized systems
- Chemicals
- Extreme temperatures
- Noise
- Lifting equipment
- Other

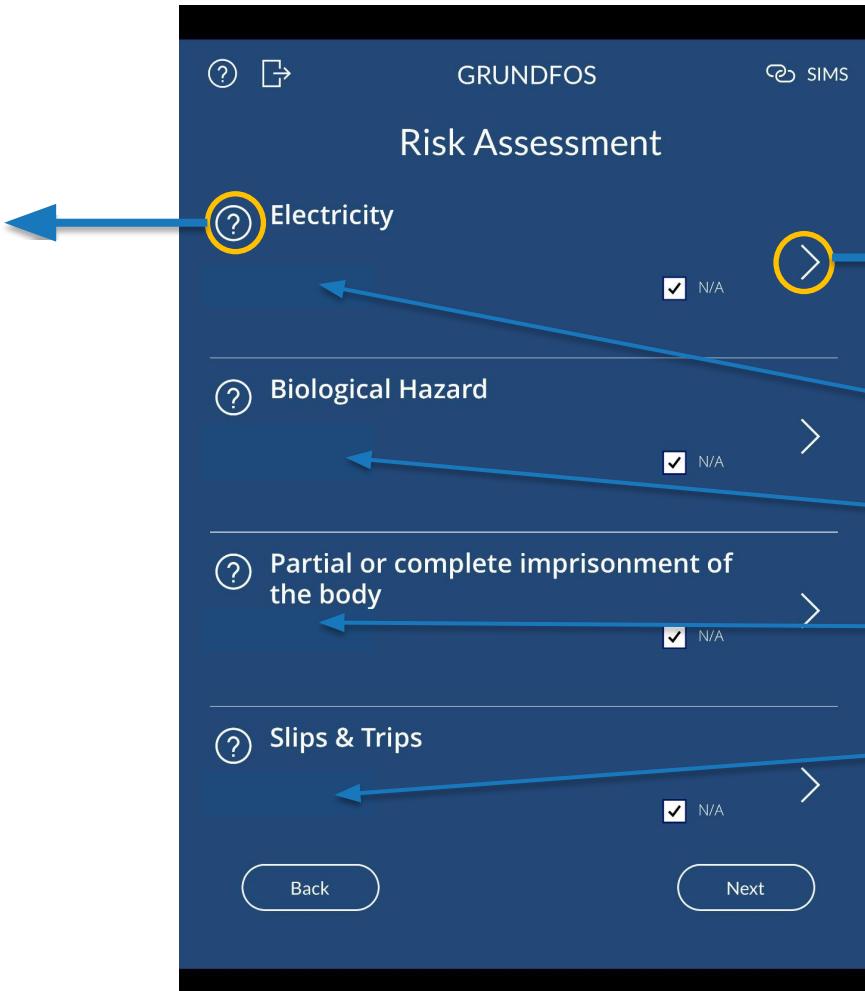


Specify the risk found and that is not within the predefined list of SARA.

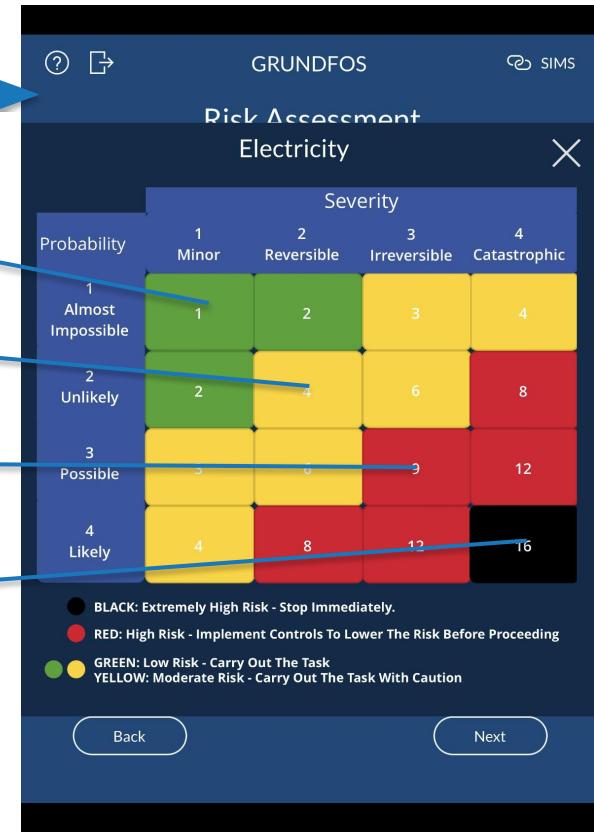
# COMPONENTS OF THE ON-SITE RISK ASSESSMENT



Risk explanations and recommended control measures

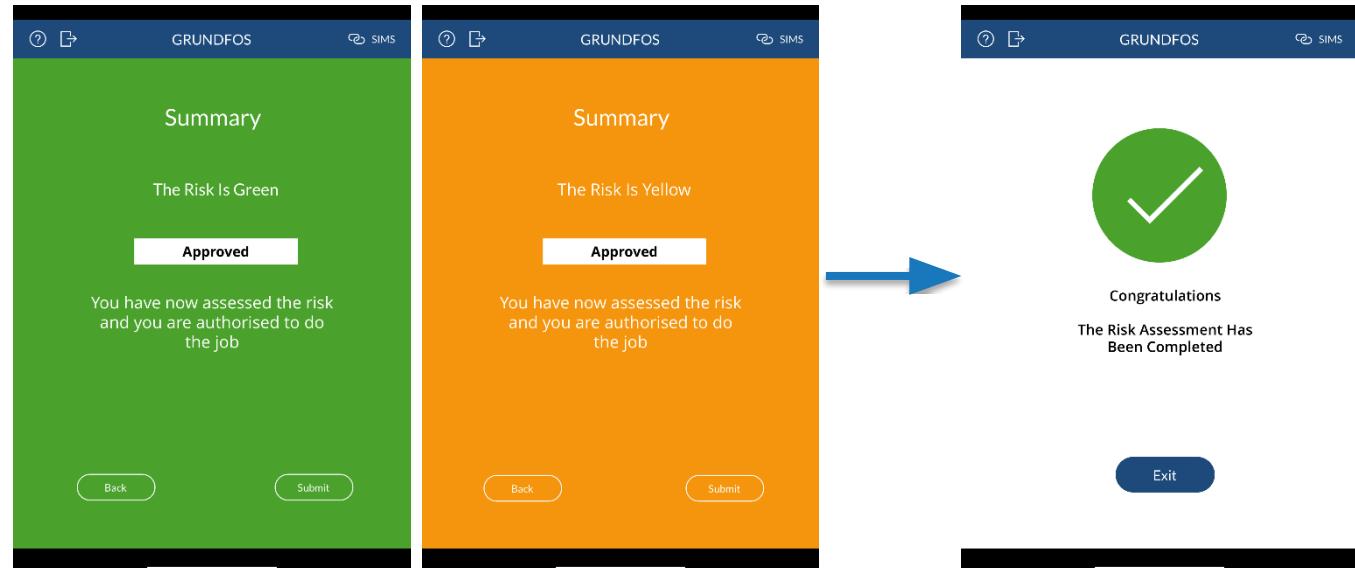


Grundfos Risk Assessment Matrix



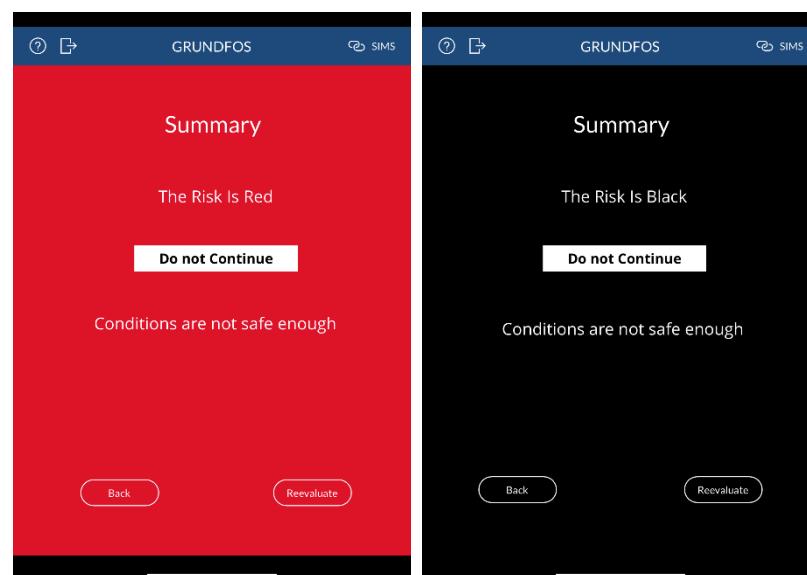
## RESULTS OF THE RISK REASSESSMENT WITH SARA

- If the risk assessment is **GREEN** (1-2) or **YELLOW** (3-6), the technician will be **AUTHORIZED** to continue with the activity.

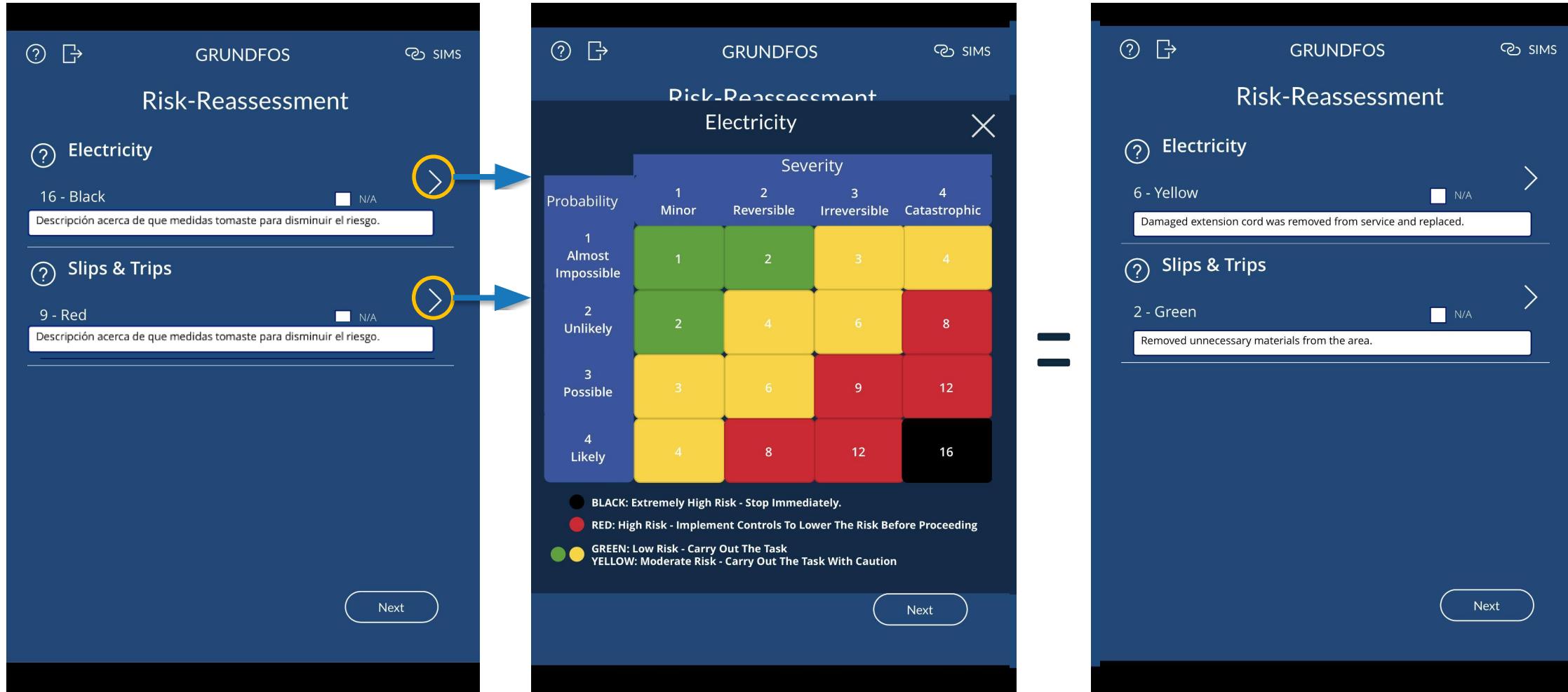


If the risk assessment is **RED** (8-12) or **BLACK** (16), the technician **MAY NOT CONTINUE** with the activity and must:

- Take steps to reduce risk.
- Carry out a **REASSESSMENT** of the risk based on the measures implemented.
- Notify the client and the office about the situation.

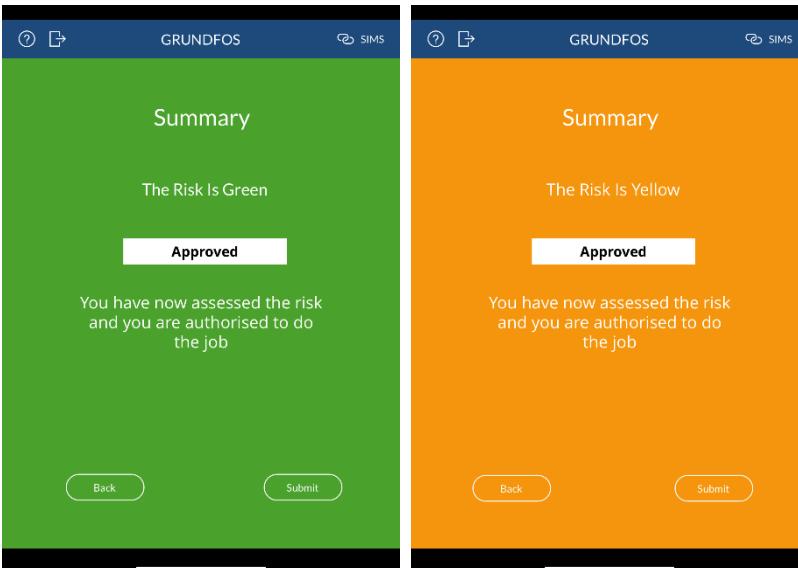


# REASSESS RISKS WITH HIGH PROBABILITY/SEVERITY (Red or Black)



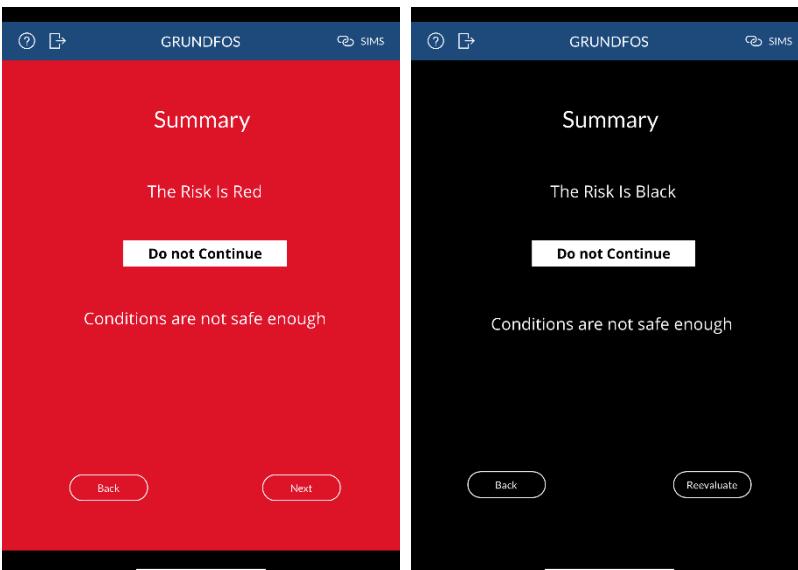
## RESULTS OF THE RISK REASSESSMENT WITH SARA

- If the risk assessment is **GREEN** (1-2) or **YELLOW** (3-6), the technician will be **AUTHORIZED** to continue with the activity.



Congratulations

The Risk Assessment Has  
Been Completed



- If the risk assessment is **RED** (8-12) or **BLACK** (16), the technician **WILL NOT BE ABLE TO CONTINUE** with the activity and must contact the office to reschedule the activity when the risk has been reduced.

# SARA's REPORT

1. Once the evaluation in the app is finished, SARA will send an email to the technician who performed the inspection with the report. The mail will look like this:

The screenshot shows an email from Angel Guía (503867789) to Service Robot; Angel Guía. The subject is "Risk assessment result: Approved". The email body includes a message about importance and two attachments: "SARA Risk Assessment - 503867789.pdf" (153 KB) and "SessionStorage98A91ADE-6373-4B7B-A04E-F6F6CDF0565.jpg" (57 KB). Below the email is a detailed risk assessment report table and a section for uploaded pictures.

| Question  | Answer  |
|---|---|
| Country:  | United States   |
| Language:   | English   |
| Employee's Full Name:   | Angel Guía  |
| Employee Number:  | 64833   |
| Service Order Number:   | 503867789   |
| Customer Contact Person:  | Justin McAllen  |
| Customer Emergency Contact Person (If Different)                    | Andrew Martins  |
| Site Address:   | W647-xx2 Chicago, Illinois, EE. UU.                   |
| Job Task To Be Done:  | CR pump commissioning                                 |
| Will you carry out lock-out/tag-out before starting the task?       | Yes   |
| Do you have all the necessary tools?                                | Yes   |
| Do you have the necessary competencies?                             | Yes   |
| Do you have all the necessary personal protective equipment?        | Yes   |
| Do you have a first aid kit?  | Yes   |
| Are control protocols in place?                                     | Yes   |
| Do you have permission from the site/end-user to carry out the job? | Yes   |
| What is preventing you from having permission to do the job?        | Nobody in site to approve the access to the pump room |

Risk type assessment:

| Risk  | Score | Action  |
|---|-------|---------|
| Electricity                                       | 3     |         |
| Biological Hazard                                 | 1     |         |
| Partial or complete imprisonment of the body      | 3     | Action1 |
| Slips & Trips                                     | 2     | Action2 |
| Work at height                                    | 0     |         |
| Work in a confined space                          | 0     |         |
| Fixed objects                                     | 0     |         |
| Moving vehicles and/or machinery                  | 0     |         |
| Sharp parts/edges                                 | 0     |         |
| Ergonomics 1: difficult working position          | 0     |         |
| Ergonomics 2: manual handling & use of hand tools | 0     |         |
| Time pressure                                     | 0     |         |
| Pressure systems                                  | 0     |         |
| Chemicals   | 0     |         |
| Extreme temperatures                              | 0     |         |
| Noise   | 0     |         |
| Lifting equipment                                 | 0     |         |
| Other (Please specify hazard in text box)         | 0     |         |

Uploaded Pictures:

| Name  | Images |
|---|--------|
| SessionStorage98A91ADE-6373-4B7B-A04E-F6F6CDF0565.jpg |        |

2. Inside the mail you will find the information uploaded in SARA and you will also find:

- SARA report in pdf
- Photos uploaded to the app

3. Finally, by entering the SO in SAP, you will be able to see the following files in the attachments:

- SARA report in pdf
- Photos uploaded to the app

The screenshot shows the SAP Service Order header for order ZCS1 400257461. It displays customer address details and a context menu for the attachment "SessionStorage98A91ADE-6373-4B7B-A04E-F6F6CDF0565.jpg". The menu options include Create..., Attachment list, Private note, Send, Relationships, Workflow, My Objects, and Help for object services.

# HOW TO DOWNLOAD THE SARA APP

## Installation steps:

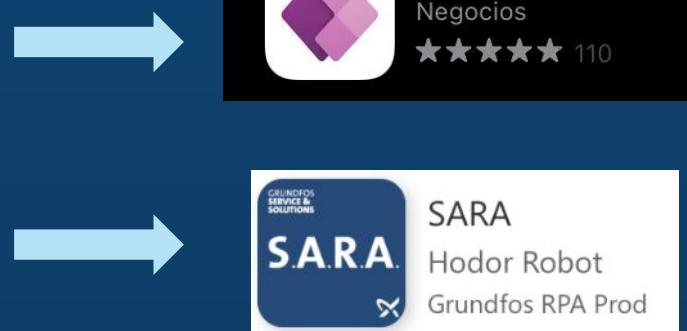
1. Open the "App Store" app



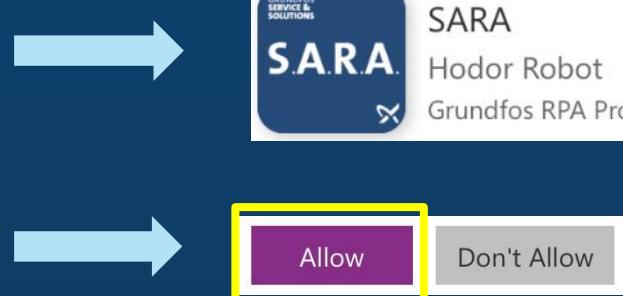
2. Find the "Power Apps" app:



3. Download the app:



4. In the "Power Apps" application,  
search for SARA



5. Accept the permissions it asks for the  
app to work. (GPS, Office, etc.)

## PC version:

<https://apps.powerapps.com/play/daf76b49-6f49-472e-92b9-ee6634d9eac6?tenantId=dabd5d90-87c2-44c9-93cd-783e032336e40>