Global Human Resources Cloud

Using Workforce Health and Safety Incidents

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Author: Hema Hardikar

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ⓘ to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

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Thanks for helping us improve our user assistance!

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1 Workforce Health and Safety

Overview of Workforce Health and Safety

Keep your employees safe by streamlining the reporting of environmental health and safety (EHS) incidents and initiating and completing environment health and safety inspections with Oracle Fusion Workforce Health and Safety.

Let's review what you can do in the application:

Manage safety incidents:

- Quickly enter incident details.
- Enter cybersecurity incident details.
- Create questionnaires to use in incident creation and incident investigations.
- Conduct reviews, create actions, and automate follow up.
- Assign and remind incident owners of incident activities.
- Categorize incidents into different event types, such as vehicle incident or environmental spills or releases.
- Identify unsafe working conditions or unsafe acts.
- Check the progress of reported incidents using analytics.
- Use HCM Cloud Global HR data and processes.
- Secure data and functions by roles and privileges.
- Conduct health surveys for employees.
- Assign actions.
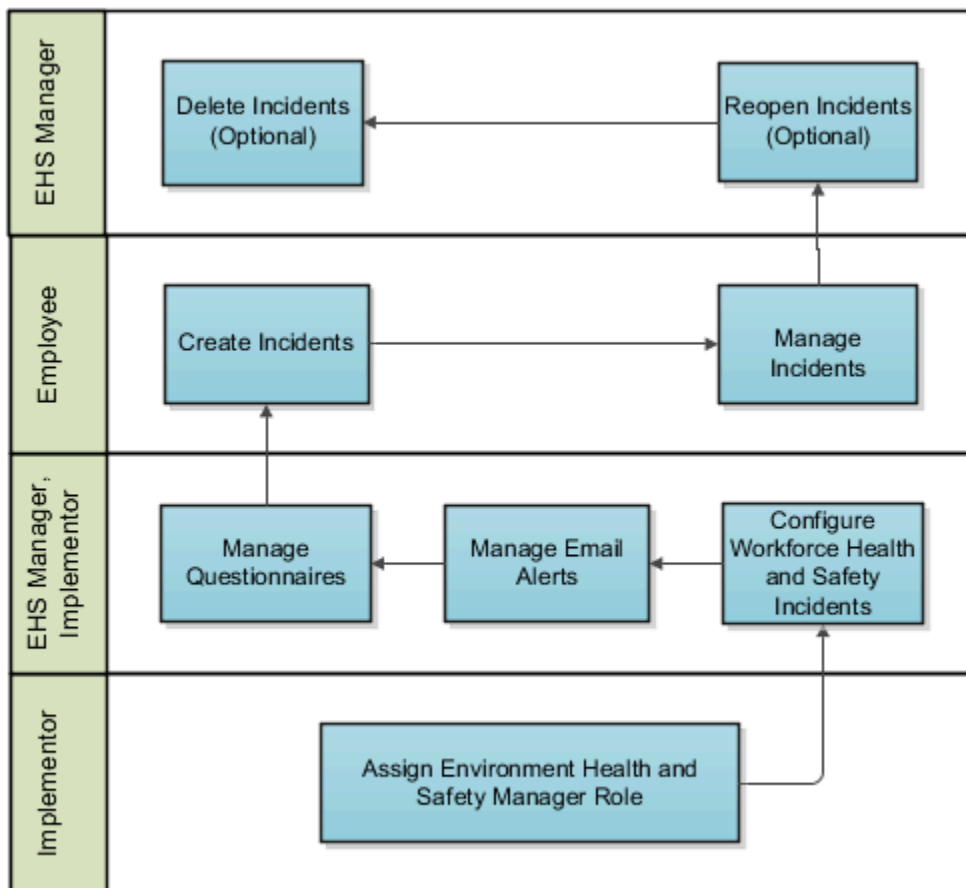
Manage safety inspections:

- Add inspection items such as a piece of plant or machinery.
- Import and export inspection items.
- Create questionnaires to use in inspections.
- Quickly create an inspection.
- Record inspection findings and outcomes.
- Use HCM Cloud Global HR data and processes.
- Secure data and functions
- Assign Actions

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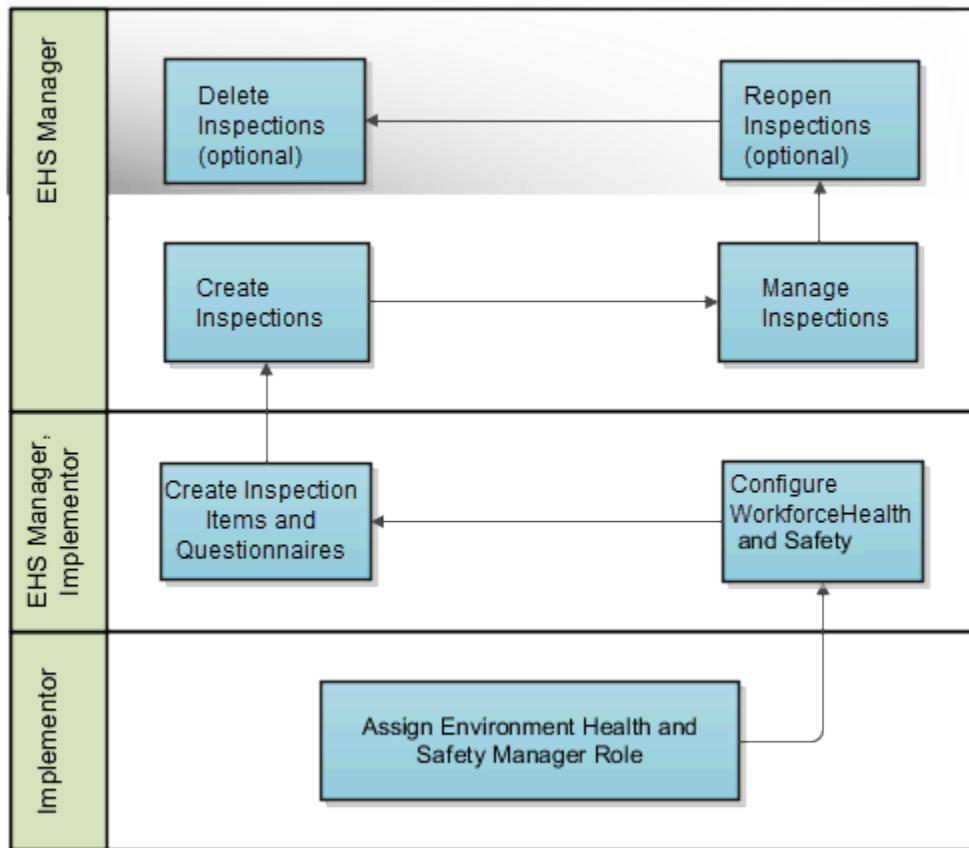
Create Assignment Rules

- To avoid assigning users to incidents manually, create rules that assign professional users automatically to incidents and related objects.
- Select an object for the assignment rule.
- Create conditions for the assignment rule.

Here's how the functionality can help you and your organization:

- Create a safer work environment.
- Reduce risk, disruption, and costs.
- Comply with environmental, health and safety regulations.
- Help organize the reporting of incidents.
- Conduct inspections and correct shortcomings in the health and safety management programs.

Here's what different users can do in the application:

- For employees, a simple user interface makes it easy to report an incident, complete a health survey, or conduct an inspection.
- For health and safety managers, a richer interface provides everything you need to manage and resolve incidents, and review and follow up.

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Related Topics
- Manage Safety Incidents
- Create Reports and Analytics

Implement Workforce Health and Safety

You must have the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to implement the application. Set up the tasks associated with Workforce Health and Safety by using Functional Setup Manager. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide for more information.

Use this application to report and manage work-related health and safety incidents, capture critical event information, create and manage safety inspections, and create and manage assignment rules. The functional area is Workforce Health and Safety Incidents, which sits within the Workforce Deployment offering. Use the Associated Features report to see a full list of functional areas and features. You get this report at the time of planning the implementation.

Set Up Workforce Health and Safety

To understand how to set up Workforce Health and Safety, refer to *How do I set up workforce health and safety*

Related Topics
- Plan Your Implementation

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2 Create Employee Self-Service Incidents

Create a Safety Incident Report

Employees can report an incident in Workforce Health and Safety by navigating from Home > Me > Safety Incidents. If you can't find the Safety Incidents app, contact your EHS Manager to make the app available for you.

1. Click **Safety Incidents** to open the **Report an Incident** page. Various event tiles appear in a page. You may want to select one or more event types when reporting the incident.
2. Select one or more Event Type check boxes, for example, Ergonomic, Air Quality, and so on. After submitting the incident, the application creates the relevant events for the incident.

   > **Note:** This event tiles page is displayed based on the **Employee Self-Service Events (HNS_KIOSK_SHOW_EVENTS)** profile option and **Manage Incident Events Lookup** page settings. By default, the option is enabled. If your administrator has decided not to show the events page, then you won't see the event tiles page in employee self-service. You can also see the Health Survey option on the page if your administrator has enabled it. Select this option only if you want to take a health survey

3. Click **Continue**.
4. On the **Report an Incident** page, **Incident Details** region, specify details in **What's the incident?** incident **Description**, and **Actions already taken**.
5. Select **Level of Security**. Specify where the incident occurred and other details.
6. Click **Continue**.

   > **Note:** The **Incident Details**, **Who's reporting this Incident?**, **Attachments** regions open sequentially.

7. In the **Who's Reporting This Incident?** region, your details appear for **Incident Reporter** type, reporter name. You can change the details if the default values aren't correct.
8. Select the incident owner.
9. Select the name of the person in the **Who was notified?** field.
10. Select the notified person name, notifications date and time in the **Who was notified?** and **Notification Time** fields.
11. Click **Continue** to go to the **Attachments** region.

    > **Tip:** Click the Edit icon to go back to any region and modify the details, if required.

12. Add any relevant attachments for the incident.
13. Click **Submit**.

Your incident is now on its way to the EHS Manager for resolution.

> **Note:** If assignment rules are created the incident may automatically be routed to the assigned incident owner for attention.

Related Topics
- How You Assign Areas of Responsibility

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Create a Cybersecurity Incident Report

As an employee, you can report a cybersecurity incident by navigating from Home > Me > Risk and Compliance > My Cybersecurity Incidents. If you can't find the Cybersecurity Incidents app, contact your EHS Manager to make the app available for you.

1. Click **Cybersecurity Incidents** to open the **Report an Incident** page. Various event tiles appear in a page. You may want to select one or more event types when reporting the incident.
2. Select one or more Event Type check boxes, for example, Lost or Stolen Device or Suspicious Email or Call. After submitting the incident, the application creates the relevant events for the incident.

   Note: This event tiles page is displayed based on the profile option (HNS_KIOSK_SHOW_EVENTS) being set to Y. The names and order of events that appear on this page are configured using the Manage Incident Events Lookup page settings. By default, the option is enabled. If your administrator has decided not to show the events page, then you won't see the event tiles page in employee self-service.

3. Click **Continue**.
4. On the **Report an Incident** page, **Incident Details** region, specify details in **What's the incident?** incident **Description**, and **Actions already taken**.
5. Select **Level of Severity**. Specify where the incident occurred and other details.
6. Click **Continue**.

   Note: The **Incident Details**, **Who's reporting this Incident?**, **Attachments** regions open sequentially.

7. In the **Who's Reporting This Incident?** region, your details appear for **Incident Reporter** type, reporter name. You can change the details if the default values aren't correct.
8. Select the incident owner.
9. Select the name of the person in the **Who was notified?** field.
10. Update the **Notification Time** field.
11. Select the notified person name, notifications date and time in the **Who was notified?** and **Notification Time** fields.
12. Click **Continue** to go to the **Attachments** region.

    Tip: Click the Edit icon to go back to any region and modify the details, if required.

13. Add any relevant attachments for the incident.
14. Click **Submit**.

Your incident is now on its way to the EHS Manager for resolution.

Note: If assignment rules are created the incident may automatically be routed to the assigned incident owner for attention.

Complete a Health Survey

In this example, you take a health survey to provide information about your current state of health. The health survey is created and made available to you by your administrator.

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> **Note:** There are no predefined health surveys in the application, the administrator needs to set them up.

1. Click **Safety Incidents** to open the **Report an Incident** page.
2. Select **Health Survey** and click **Continue**.
3. On the **Health Survey Details** page, complete the fields as shown in this table.

Field	Value
What type of survey responder are you?	Employee
Survey Responder Name	Pat Williams
Survey Date and Time	3/1/21 2:30 PM
Survey Location	California

4. A questionnaire is shown based on the survey details you entered. Enter your responses to the questions and click Submit. Note that you have to enter responses for all the required questions.

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3 Manage Safety Incidents

Professional User's Incidents Work Area

As a professional user, you can manage the incidents in the Incidents work area by navigating to Home > My Client Groups > Safety Incidents . You can search for incidents, modify, and report incidents.

You can search for incidents by:

- Incident name or number

- Filters such as:

  - Target completion date

  - Level of severity

  - Event type

  - Location

  - Status

  - When incident was reported

- Saved Searches: Use the available saved searches or personalize your search by saving your search for yourself or others. Click the gear wheel to select the search criteria.

Find the list of incidents on the page sorted by default in this order:

- Incidents with no owner; sort by earliest target completion first

- Earliest target completion date of the incident

- Incident with an owner; sorted by earliest completion date first

Use the **Sort By** list to order the incidents list by these options:

- Incident Number (from highest to lowest)

- Incident Reported Date (from newest to oldest)

- Target Completion Date of Incident (from oldest to newest)

- Severity Levels of Incident, (from highest to lowest)

- Relevance (default sorting pattern that's mentioned earlier)

Each incident in the list appears with key information such as incident name, number, date and time the incident took place, level of severity, name of the incident owner, target completion date, and completion status.

See the number of events, investigations, and actions that display for the incident. You can review and update the details directly in the page. Additionally, you can use the incident name link to open the incident page and then go to the specific details of the incident. Apart from searching for incidents, you can create incidents and manage them too. The EHS manager can review, modify, and delete any incident.

| **Note:** Your access to incidents is based on the security privileges and active assignments in the incident.

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How Incident Records are Secured

The application secures incident records using the standard data security framework.

Any user other than the user with the EH Manager job role can access an incident record only when both these conditions are met:

- The user has the requisite environment health and safety privileges.
- The user has access to the specific incident record.

Access to Incidents

The EHS manager assigns a user as the incident owner for any incidents created by employees in employee self-service (when assignment rules are not active). When a professional user creates an incident, they can assign users to the incident by virtue of being the logged-in user. Users receive emails when assigned to or removed from an assignment on an incident. This security approach ensures that a user with an employee custom role having the relevant HNS privileges only can access incidents assigned to the user.

Action Management

An action owner, preapprover, approver, or reviewer can't access the incident details, event, or investigation pages. They can only access the action record they are assigned to, if they have the requisite privilege.

Manage Safety Incidents

When employees report incidents, they're accessible to the EHS Manager for resolution.

The EHS Manager assigns an incident owner for an incident, who manages and solves the incident. If you're using the Journeys application, you can report a safety incident from within a journey.

In managing the incident, the incident owner captures additional details in the **Incident Details**, **Events**, **Investigations**, **Actions**, and **Attachments** for the incident. Let's see the various aspects of an incident and how you can use them and track the details. The Incident page has these tabs in the left pane. Click these tabs to open the respective pages.

- **Details** tab: The Incident page with the incident number as the page header starts with **Incident Details** region followed by **Location**, **Risk Assessment**, **Agencies Notified**, **Related Incidents**, **Notes**, **Stakeholders**, **Incident Reviewers**, **Incident Approvers**, **Safety Coordinator** , and **Incident Owner** regions.
- **Events** tab: The **Events** page includes incidents if any events are already added. You may want to add any relevant events to the incident. Click the **Add** button on the Events page and select the event type to create an event. You can have only one event for an event type.
- **Investigations** tab: The **Investigation** page starts with **Investigation Details** region followed by the **Investigation Questionnaire**, **Findings**, **Overall Findings**, **Notes**, **Stakeholders**, **Investigation Preapprovers**, **Investigation Reviewers**, **Investigation Approvers**, and **Investigation Owner** regions.
- **Actions** tab: The **Actions** page starts with the **Action Details** region followed by the **Notes**, **Stakeholders**, **Action Preapprovers**, **Action Reviewers**, **Action Approvers**, and **Action Owners** regions.

- **Attachments** tab: You can add attachments and links relevant to the incident on the **Attachments** page.

> **Note:** For events of type Health Survey, you can see an additional section named Questions. You can see the questionnaire that the employee has completed as a part of taking the health survey. The questionnaire is displayed in read-only mode.

To manage cybersecurity incidents, you can access them from the Risk Management work area and follow the same detailed instructions.

Enter Incident Details

The Incident Details page lets you record details about your incident, location, notified agencies, related incidents, notes, stakeholders, incident reviewers, approvers, and owner. The incident owner is responsible for acknowledging the completion of an incident report.

1. In the Incident Details region, specify the information for these attributes:

   a. Summary and Description of the incident
   b. Date and Time
   c. Level of Severity
   d. Immediate Actions
   e. Lessons Learned
   f. Incident Reporter person type and name
   g. Person who was notified and the notified time

2. Click **Save and Close**.
3. In the **Incident Location** region, update the location details, if required. Select the Conditions check boxes and specify the related details.
4. Click **Save**.
5. In the **Risk Assessment** region, add a risk assessment and select the consequence and likelihood values. Note that the risk score is automatically calculated and displayed.
6. If you know the agencies that were notified of the incident, select them in the **Agencies** region.
7. In the **Related Incidents** region, click **Add** to include the related incidents.

   a. After the **Incidents** work area opens, search for and select the related incidents for reference, if you have a role in that related incident.
   b. Click **Save and Close**. The selected incidents appear in the **Related Incidents** region of this incident.

8. Track notes for the incident in the **Notes** region. Click **Add**.

   a. Enter note text for the event.
   b. Click **Save**. The note is saved and is displayed in the **Notes** region with name of the person who created the note and the date when it was created.

9. Assign a safety coordinator, incident stakeholders, reviewers, and approvers in the respective region of the incident page and specify related details.
10. Assign an incident owner and update the target completion date. When the incident is complete, you can update the status and mark it complete.

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> **Note:** Note: An incident owner can re-open a closed event, investigation or action for the incident they have been assigned to. Only a user with the EHS Manager job role can reopen a closed incident.

Event Types for Incidents

You have a number of event types based on which you can add events to your incident.

You specify the Event Details, Notes, Stakeholders, and Event Owner details in the respective regions of the Event page. This apart, you can specify event-specific attributes. Let's see the event-specific attributes and regions that can be tracked for an event.

Event Type	Event-Specific Regions and Attributes	Description
Air Quality	Event Details region>Air Quality Type: • Values: Fumes, Mold, Odor, Smoke, Other • Employee Name	Select a value from the Air Quality Type list. Select the employee who was directly impacted by the air quality.
Ergonomic	Event Details region > Ergonomic Type • Ambient Temperature • Contact Stress • Posture • Repetitive Task • Use of Excessive Force • Vibration **Request an ergonomic assessment** check box Employee Name	Select a value from the Ergonomic Type list. Select the request for an ergonomic assessment to ensure employee's correct posture and reduce the exposure to physical hazards. Select the name of the employee.
Fire or Explosion	Select the one or more relevant check box options: • Fire • Explosion • Replenish Fire Fighting Equipment	Based on the option you select, specify the relevant details for the attributes in the regions.
Issue	Issue Event Details region> **Issue Type**: External Non-conformance Internal Non-conformance Incident event Investigation	Select a value from the **Issue Type** list.

Event Type	Event-Specific Regions and Attributes	Description
	Permit violation Other	
Near Miss	Person Property Vehicle Other	Select a value from the **Near Miss** list.
Notice of Violation	Event Details region> Violation Type	Specify the value in the Notice of Violation type for the event. For example, EPA, OSHA, Police, and so on
Property Damage	Event Details region> Property Damage Type Public Private Company Employee Contractor Customer Supplier Other	Specify a value from the **Property Damage Type** list.
Spill or Release	Attributes Spill or Release Type Total Mass or Volume Released and Recovered Possible Cause What was Spilled or Released Spill Kit Deployed Cleanup Team or Contractor Notified Does Spill Kit Need Replenishing?	Specify the values for these attributes and other related attributes for the Spill or Release event.
Suggestion for Improvement	Event Details region>Improvement Type: Communication Environmental	Select a value from the **Improvement Type** list.

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Event Type	Event-Specific Regions and Attributes	Description
	Mechanical	
Unsafe Act	Event Details region> Unsafe Act Type	Select a value from the Unsafe Act Type list. For example Incorrect Use of Personal Protective Equipment, Job Safety Analysis Not Followed
Unsafe Condition	Event Details region> Unsafe Condition Type Biological Hazards Physical Hazards Security Hazards Equipment or Machinery Hazards Ergonomic Hazards Chemical or Dust Hazards Other Unsafe Conditions	Specify a value from the **Unsafe Condition Type** list.
Vehicle Incident	Attributes: Road Condition Light Conditions Weather Condition Traffic Traffic Controls Police Report check box Police Agency Location Rental vehicle Rental vehicle replacement Insurance information	Specify the values for these attributes and other related attributes for the vehicle incident event. Specify vehicle insurance details and details of rental vehicles involved in the accident or rental vehicles used as replacement.
Virus, Illness, or Injury	Event details include **Notified Human Resources** check box	When you select the option, specify the date and time of notifying HR. This indicates that the HR department is notified about the incident.
Virus, Illness, or Injury	**Injured or Ill Person Details** region attributes: • Person Type • Name • Event date and time • Name of the person who was informed including the date and time	Specify the Person Type and Name of the injured or ill person. Describe the activity of the injured or ill person before the incident. If the person has lost time, provide an estimate of lost hours. If the person is absent from work for 1 or more days, mention the details. If the person returns to work, specify the Return to Work attributes such as date, job transfer

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Event Type	Event-Specific Regions and Attributes	Description
	• Person activity before the incident • Source • Mechanism • Classification • Injured Body Part and Injury Type • Treatments • Lost Time and Return to Work	or restrictions, if any. You can add information for multiple treatments and multiple returns to work. A unique case number is generated for the ill or injured person which is used to track details for the Illness or Injury event.
Virus, Illness, or Injury	**Witness Details** region attributes: Person Type Name Phone Email	You can add one or more witnesses to the event and specify the related details in the region.

Create Incident Events

You can record information about the events associated with the incident. You can create multiple incident events at the time of reporting or managing the incident.

1. From the **Events** page of the incident, click **Add** to create an event.

   Note: Your administrator may want to show or hide or modify the event names by defining them in the **Manage Incident Events Lookup** page. Based on those settings you can find the event types.

2. Click the event type. The respective event details page for the event type opens.
3. In the **Event Details** region, enter the Summary, Description, Date and Time of the event, Reported Data and Time, Level of Security, and Lessons Learned.
4. Click **Save**. The event is created and appears on the Events page of the incident.
5. You can track notes for the event in the **Notes** region. Click **Add**.

   a. Specify note for the event.
   b. Click **Save**. The note is saved and is displayed in the Notes region with the name of the person who created the note and the date it was created.
6. Identify the event stakeholders in the **Stakeholders** region.
7. In the **Event Owners** region assign a person to own the event and set the target completion date.

   Note: When the event is complete, you can close the event by selecting the Completed check box and specifying the completion date.

8. If any action is required from the event owner, select the **Action Required** check box.

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9. Click **Save**. The event is created with a unique event number and displayed in the list of events for the incident.

The application generates a unique identifier for the event and is displayed in the list under the Events page. All the events that are created for the incident are listed here in this page.

Create Investigations

Create and manage investigations to determine the root cause of incidents. The investigator can gather and analyze your data, note investigation findings, and recommend actions to prevent such incidents. You can create multiple investigations.

1. In the **Investigations** page of the incident, click **Add** to create an investigation.
2. Specify these details in the **Investigation Details** region:

    a. Date and Time
    b. Summary and Description
    c. Investigation Type and Incident Event
    d. Lessons Learned
    e. Click **Save and Close**. The investigation is created and appears in the **Investigations** page of the incident

3. In the **Investigation Questionnaire** region, you can add the investigation questionnaire to answer questions related to the incident. Click **Edit**.

    a. Search for and select **Questionnaire Name**. The questions appear in the region. You may want to answer the questions now or later too.
    b. Click **Save**.

4. In the **Findings** region, click **Add** to create findings.

    a. Enter the **Finding Summary** details and **Notes**.
    b. Select the **Level of Severity** and specify **Finding Response**.
    c. Optionally, you can create recommendations for every finding. Click **Add Recommendation** link and specify your recommendation.
    d. Click **OK** to save the finding. The finding is created and listed in the page.

5. In the **Overall Findings** region, you can specify the **Casual Factors**, **Immediate Cause**, **Underlying Factors**, **Root Cause**, **Contributing Factors**, **Comments**, and **Final Response** and then click **Save**.

6. You can track your Notes for the investigation. Click **Add**.

    a. Specify notes for the investigation.
    b. Click **Save**. The note is saved and is displayed in the Notes region with name of the person who created the note and the date when it was created.

7. In the **Stakeholder** region, click **Add**.

    a. Specify the Name, person Type, and Category of the stakeholders.
    b. Click **OK**.

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8. You can assign an owner and optionally, incident investigation **Preapprovers**, **Approvers**, **Reviewers**, and specify the related details. In the **Investigation Owner** region, you can set a **Target Completion Date**. You can track completion details when done with the investigation.

   The application generates a unique identifier for the investigation and is displayed in the list under the **Investigations** page. You can add one or more investigations for an incident.

Create Incident Actions

Create one or more actions to find the cause of the incident, discover near misses, or rectify any unsafe conditions.

1. On the **Actions** page, click **Add**.
2. On the **Action Details** page:
   a. Enter **Summary** and **Description**.
   b. **Date** and **Time** defaults to when the action was created. Modify it, if required.
   c. Select **Action Type** from the list.
   d. Select **Resources Required**.
   e. Set the **Action Priority** from the list.
   f. Specify the **Estimated Cost** and **Currency**.
   g. Click **Save**.
3. Track notes for the Action in the **Notes** region. Click **Add**.
   a. Specify notes for the event.
   b. Click **Save**. The note is saved and is displayed in the **Notes** region with name of the person who created the note and the date when it was created.
4. Assign incident action stakeholders, reviewers, preapprovers, and approvers in the respective regions of the incident page and specify related details. Assign an incident owner and update the target completion date. Specify the incident action **Owners** and the **Target Completion Dates**.
5. Select the action priority.
6. Select a safety coordinator for the incident if required.
7. Click **Save**.

   When the action is complete, you can update the status and mark it complete.

The application generates a unique identifier for the Action and is displayed in the list on the **Actions** page. You can add one or more Actions for an incident.

Add Attachments to Incident

You can add attachments related to the incident such as photos or documents to help with the incident report.

1. On the **Attachments** page, click **Add** to add attachment or links.

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2. For files, you can drag and drop the files or click **Add File** to specify the file path.

3. For links, click **Add Link** and specify the URL and click **Save and Close**.

    The file name including the size and the person name who posted the attachment is listed in the **Attachments** window. You can download the attachments or delete them.

4. Click **Save**. The files and links are listed in the **Attachments** page.

How You Close Incidents

Here are a few things to keep in mind when you're closing an incident. Find the incident you want to close and check the status in the Safety Incidents dashboard. Remember you can close an incident even if it has open actions.

To close an incident, everyone involved in the incident must select the completed check box on these pages.

Pages	Roles
Incident Events	Incident Event Owners
Investigations	Incident Investigation Reviewers, Incident Investigation Approvers and Preapprovers, Incident Investigation Owners
Incident Details	Incident Reviewers, Incident Approvers, Incident Owners

Note: Note: Actions need not be closed to close an incident.

Related Topics
- How can I close an incident event, action, investigation, or an inspection?
- How can I reopen an incident or inspection?
- How can I delete an incident or inspection?

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4 Manage Safety Inspections

Manage Inspection Items

To set up an inspection, you should first create any questionnaires you want to add to the inspection item, then create the inspection items and then create the inspection.

Add Inspection Items

You can add items for inspection such as a piece of plant, equipment, vehicle or any asset. An item can be created for a facility or building or for a system, process, or activity. You can add an inspection item by navigating through Home > My Client Groups > Health and Safety > Inspection Item Maintenance.

Follow these steps to add an inspection item:

1. Click + on the Inspection Items page.
2. In the Add item pane, enter the item name, description, and other item details.
3. You may want the user to report the inspection findings by answering a predetermined set of questions. In the Questionnaire drop-down field, you can select the relevant questionnaire. The field lists all the predefined questionnaires.

You can create a basic questionnaire from within the Inspection Items page. To create and manage detailed questionnaires, refer to the topic **How You Create a Questionnaire** in the **Setup Workforce Health and Safety Incidents** chapter in the **Using Workforce Health and Safety** guide.

Follow these steps to create a basic questionnaire from the Inspection Items page:

1. Select Create Questionnaire under More Actions.
2. Enter the questionnaire name.
3. In the Questions section, click Add.
4. Enter the question text.
5. Select the question type and enter the responses based on the question type. You can also add a follow-up question when adding the responses.
6. Click Create. Once the questionnaire is created, it becomes available for selection when adding or updating an inspection item.

Import and Export Inspection Items

You may want to import inspection items from another source. Similarly, you may want to export inspection items to a spreadsheet format, which can be used for importing elsewhere.

Follow these steps to import and export inspection items:

1. If you're importing for the first time, you need to download the excel template to enter the import data. To do so, click the export button on the Inspection Items page without selecting any items. Open the downloaded excel template and enter the data you want to import. For subsequent imports, you can use this same downloaded excel template.
2. Enter a value for Name in the excel file. Note that only the Name field is mandatory, you may leave all other fields blank.

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      a.

3. Follow these steps to get the questionnaire name and code if you want to import a questionnaire:
   a. In the Setup and Maintenance work area, go to:

      - Offering: Workforce Development
      - Task: Questionnaires

   b. In the **Questionnaires** page, search for **Workforce Health and Safety Inspections** subscriber.
   c. Select the **Safety Inspection Questionnaires** folder. You can then get the questionnaire code and name of the questionnaire that you want to import.

4. After entering all the data in the excel file, click the Import button.
5. Select the Excel file containing the inspection item data and click Import.
6. Click the History tab to see if the file is imported. The History tab displays the list of imported files.
7. To export, select the items you want to export.
8. Click the Export icon in the top right of the page. The downloaded excel file will contain all the items that you selected for export.

Manage Inspections

You can create and manage safety inspections by navigating through Home > My Client Groups > Health and safety > Health and Safety page > Inspections.

Follow these steps to create a safety inspection:

1. Click **Add**.
2. In the **Details** section, select the inspection type and the subtype.
3. Select the date and time of inspection.
4. In the **Location** section, specify whether the inspection is onsite or offsite and enter the location details.
5. In the **Items** section, search for and add the items that you want to inspect, for example, plant, equipment or vehicle.
6. Click on an item to enter the findings and the result. If the Finding section includes a questionnaire, then you can answer the questions and report the findings. If it doesn't include one then you can skip the section. You can just select the result whether it's a pass or a fail.
7. Select the Create action checkbox if any follow up action is required based on the inspection. You can track the actions using the Actions page like safety incidents.
8. You can include any attachments and pictures for the inspection item.
9. In the **Overall Findings** section, you can select the factors and causes and enter your final response.
10. In the **Outcome** section, you can select the final result and severity level and the task completion date.
11. Once you save the inspection, it appears on the Inspections page. You can see additional sections for the saved inspection including **Inspection Owner**, **Risk Assessment**, and **Related Inspections**, like incidents.
12. Two additional tabs **Actions** and **Attachments** are also displayed enabling you to add any action items for the inspection and attach any inspection related files such as photos or documents.

   Note: To close an inspection, reviewers and approvers must have signed-off the inspection. An exception to this is when the profile setting ORA_HNS_INSPECTION_AUTO_CLOSE_ENABLED is set to Y. The inspection can be closed by the inspection owner, safety coordinator, or a user with the EHS Manager job role without the reviewers or approvers having signed off. Actions can remain open.

5 Manage User Assignment Rules

Overview of Assignment Rules

Any number of professional users may participate in resolving health and safety incidents or inspections. Rather than undergo the time-consuming process of assigning these users manually, you can create rules that assign professional users automatically to incidents and it's related objects or to an inspection.

A user with the **Environment Health and Safety Incident Manager** or **Environment Health and Safety Manager** job role can manage assignment rules. Each rule designates one of these objects: Safety Incident Details, Event, Investigation, or Action and Safety Inspection Details, Actions. The Details object represents the incident or inspection itself, and the other objects represent items professional users may create to address the incident or inspection. Each rule applies specifically to the object it designates. For example, if a rule specifies the Investigation object, it assigns users to investigations that have been added to existing incidents.

Next, the rule defines up to five conditions that identify the incident or inspection to which it can assign professional users. These conditions focus on attributes of employees who report incidents (or are selected as reporters) or inspections. For example, a rule may make assignments if an incident is reported by an employee assigned to a particular business unit in a particular country. For another example, a rule may make assignments for an incident if its reporter has selected a particular event type for it.

Finally, the rule assigns professional users to each incident or inspection object its conditions select. For each of the capacities in which users can be authorized, it can assign any number of individual users or the line manager of the incident reporter.

The creation of an incident or any related object, or the inspection, is the trigger for rules to be evaluated. They run in an order that you establish, and processing stops with the first rule to return results. Rules not only assign professional users, but also validate that they are eligible for their assignments.

> **Note:** To use the Assignment Rules functionality, a user must be an employee added in the application using a standard HR feature like Hire an Employee. They need to have a valid Person ID.

Strategies for Creating Rules

As you create or edit assignment rules, keep these concepts in mind:

- If multiple rules specify the same conditions, they capture, and assign users for, the same incidents. So to coordinate the selection of users who work on incident details, events, investigations, and actions, consider creating "rule sets." Each would include up to four rules, all with the same conditions but each with a distinct object. You don't have to select the same users for the rules in a set, but you can ensure that the set assigns users who can work together to resolve each incident the conditions select.

- Create "catchall" rules. These are rules whose conditions make broad selections, and so capture incidents, events, investigations, actions, inspections, and inspection actions that aren't selected by rules whose

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conditions are more precisely focused. An example might be a rule with a single condition that specifies a particular country.

However, it isn't necessary to create rules that capture every conceivable incident or inspection. A user with the Environment, Health and Safety Manager job role has access to unassigned incidents and can make appropriate assignments. A professional user who creates an event, investigation, or action owns that activity by default and can reassign it.

- Remember that rule processing stops with the first rule to return results. So as you set the order in which rules run, place the most narrowly focused rule (or rule set) first. Then order remaining rules so that each is less restrictive than the previous one. Place your least-restrictive, catchall rules last. Otherwise, the more restrictive rules will never be evaluated.

  For example, suppose rule 1 has a single condition that selects incidents reported in Germany. Rule 2 has two conditions, which select incidents reported in Germany by employees in the Consumer Electronics business unit. If rule 1 runs first, it would capture all the incidents eligible for rule 2, and rule 2 would never return any results. But if rule 2 runs first, it can capture the incidents that satisfy its conditions, and rule 1 would capture only those German incidents not already captured by rule 2.

- Be aware that assignment rules overwrite assignments made manually in the employee self-service incident-reporting flow and the professional-user pages. So you may want to use Page Composer to remove the Incident Owner field from the employee self-service incident-reporting flow. For information on using Page Composer, see Oracle Fusion Cloud Applications: Configuring and Extending Applications.

- A profile setting called ORA_HNS_OVERRIDE_ASSIGNMENT_RULES can be used to force a manual assignment.

To Begin

Open the Assignment Rules application: Navigate to Home > Risk Management > Assignment Rules or Home > My Client Groups > Health and Safety > Assignment Rules (if you've enabled the Health and Safety landing page). (This icon is available if you're assigned a job role that includes assignment-rule privileges discussed in the *Roles and Privileges for Safety and Security Incidents* topic.)

You land on a page titled Assignment Rules, which displays "cards" that serve as records of rules that have already been created. (The page is initially empty if no rules have yet been created.) You can sort cards by most-recently created rule, rule name, or object name. Click the card for a rule to display its full definition.

From the Assignment Rules page, you can create and edit rules and arrange the order in which they run.

Create or Edit an Assignment Rule

You can create, edit, copy, or delete an assignment rule. To begin with creation:

1. Click the Create Rule button in the Assignment Rules page. A creation page opens.
2. In the Rule Details region, enter a name in the Rule Name field. In the Object Name field, select one of these values: **Safety Incident Details**, **Safety Incident Event**, **Safety Incident Investigation**, **Safety Incident Action**, **Safety Inspection**, or **Safety Inspection Action**. (See *Select an Object for a Rule*.)
3. In a Conditions region, create at least one condition. Or create up to five; each time you complete one, click the Add Another button to create a new row. For each:

       o Select one of six attributes, which are labels that reflect characteristics of users selected as incident reporters.

       o Accept a default **Matches any of** operator. (No other operators are available.)

       o Enter or select one or more values that are valid for the attribute, and common to the reporters whose incidents you want the rule to select.

For example, the condition "Country Matches any of Germany, France" would select incidents reported by users who work in either of these countries. (See *Work with Conditions*.)

4. In an Assignments region, select professional users who are to be assigned to records of the object you selected in step 2:

       o In an Authorization Type field, select a value that indicates what the professional user is to do. These values vary by object, but as an example, for the Safety Incident Details object they include Safety Incident Owner, Safety Incident Approver, Safety Incident Reviewer, Safety Incident Stakeholder, and Safety Coordinator.

       o In an Assignment Type field, select User to authorize one or more users for the position you selected in the Authorization Type field. Or select Line Manager to authorize the incident reporter's line manager.

       o Complete a User field only if you selected User in the Assignment Type field: Search for and select any number of users. To search, begin to enter text. After you type a few characters, the application displays a list of values that include the text you've typed. You can then select a user from the list. If you selected Line Manager in the Assignment Type field, the User field doesn't accept entries.

You can select a distinct set of users for each authorization type. When you finish defining the users for one type, click the Add Another button to create a row to select users for another type. You can also remove an assignment row; click its trash-can icon.

5. Click the Create button.

To edit an assignment rule, click its card on the Assignment Rules page, then click the Edit button. Or to copy a rule, click the Copy Rule button in its card on the Assignment Rules page. In either case, a replica of the create page opens, populated with the values of the rule you opened. To make changes, use the same procedures as you would to create a rule. But note:

- For an edit or a copy, if you select a new object, you wipe out all of the conditions and assignments created for the original rule. So if you want to change a rule's object, you might be better off creating a new rule.

- If you copy an object, its default name is "Copy of" followed by the name of the original rule. This prevents conflict with the original rule. You may want to assign a name that's more meaningful to you.

- The final action for a rule copy is, once again, to click the Create button. When you edit a rule, however, this button is labeled "Update."

To delete a rule, click its card on the Assignment Rules page, then click the Delete button. A message requires you to confirm the deletion; click its Delete button.

Select an Object for a Rule

The object you select for an assignment rule determines the scope of users' activity in resolving health and safety incidents or inspections.

As you select an object, you choose one of these values: **Safety Incident Details**, **Safety Incident Event**, **Safety Incident Investigation**, **Safety Incident Action**, **Safety Inspection**, or **Safety Inspection Action**. The Details value represents the record of an incident or inspection as it's originally reported, and the other values pertain to items professional users add as they work to resolve the incident or inspection.

The rule assigns users to records of the object you select. It's triggered to do so when users create those records. For example, if a user adds an action to an existing incident or inspection, an assignment rule that specifies the Safety Incident Action object assigns users to that action.

Object values also correspond to tabs in the record of an incident in Oracle Fusion Cloud Workforce Health and Safety. Moreover, each object has its own set of positions it can authorize users to fill:

- When a rule specifies the Safety Incident Details object, it can authorize users as safety incident owners and safety coordinators. These users have full access to all the tabs in an incident record. (So does any user granted the predefined Environment, Health and Safety Manager job role.)

- A rule may assign users to other positions associated with the Safety Incident Details object: approver, reviewer, or stakeholder. Or it may assign users to positions associated with any other object. These include owner and stakeholder for each object type. For each object other than Safety Incident Event, they also include reviewer, preapprover, and approver. For all these assignments, the rule grants access only to the incident-record tab corresponding to the object you select for the rule.

Work with Conditions

Each rule includes up to five conditions that specify attributes of employees selected as incident reporters or inspection creators. The rule assigns professional users to incidents reported by those employees.

By default, the employee who uses the Report an Incident page to create a safety incident is its reporter. While creating the incident, however, that employee may select either another employee or a nonemployee as the reporter. Because rules depend on information about reporters to select incidents for assignment, and because that information is available only for employees, rules can't make assignments for safety incidents with nonemployee reporters.

For each condition, you select a predefined attribute, a **Matches any of** operator, and values that are valid for the attribute. The condition then selects incidents reported by employees to whom any of the values apply.

In most cases, attributes correspond to values selected for each employee in his or her Person record in Human Capital Management. These include Legal Employer, Reporting Entity, Business Unit, Department, and Country. These attributes are available no matter what object you select for a rule.

You might, for example, create the filter "Business Unit Matches any of Consumer Electronics, Database Servers." Assuming these are business units in your company, the condition would select incidents reported by employees whose Person records indicate they're assigned to either unit.

One more attribute, Safety Incident Event, is available if you select the Safety Incident Details or Safety Incident Event object for a rule. As its value, you can choose any combination of event types an employee may select while reporting an incident. The condition would then return records of incidents for which the reporter selected any of those event types.

Conditions have an AND relationship. A rule can make assignments only for incidents selected by all the conditions defined for the rule.

As you create conditions:

- Within a rule, you can select each attribute only once, for one condition.

- You can remove the row for a condition by clicking its trash-can icon. The attribute from that deleted row becomes available for reselection in a new condition.

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- To add a value, click in the Value field, then begin to enter text. After you type a few characters, the application displays a list of values that include the text you've typed. Click on the value you want. Then repeat the process for each value you want to add.

- Each time you select a value, the application places it in a box in the Value field. This separates each value from other values; you don't provide a delimiter character.

- The box containing a value also contains a deletion character (×). Click it if you want to remove the value from your condition.

Place Rules in Order

Assignment rules run in an order you establish. Here's how to set that order. Remember that rule processing stops with the first rule to return results, so you should order your rules from the most narrowly focused to the most broadly focused.

1. In the Assignment Rules page, click the Reorder Rules button. A Processing Order page opens.
2. In an Object Name field, select an object to produce a list of rules that assign professional users to records of that object. The row for each rule contains the name of a rule and a number indicating its position in the processing order.
3. Optionally, in the row for each rule, click a Rule Details icon to view the rule's name, object, conditions, and assignments. These details may help you to determine where to place the rule. In the Rule Details window, click the × icon to return to the list of rules.
4. The row for each rule includes a "handle" (it's an icon that looks like three colons). Click and hold the handle for a rule you want to reposition, and drag it to its new position. The numbering in the list of rules changes to reflect the new order. Repeat this step for any other rules you want to reposition.
5. As needed, select another object and reorder the rules pertaining to that object.
6. When you finish repositioning all the rules you want to move, click the Apply button.

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6 Analytics and Reports

Create Reports and Analytics

Use Oracle Transaction Business Intelligence (OTBI) to author, generate, and deliver reports and analysis for Workforce Health and Safety Incidents. You must have the FBI_ENVIRONMENT_HEALTH_AND_SAFETY_TRANSACTION_ANALYSIS_DUTY role to do this task. The EHS Manager already has the privileges assigned, so you can get started.

1. Click Navigator > Tools > Reports and Analytics.
2. On the Reports and Analytics page, click **Create** > **Report**.
3. In the Create Report dialog box, select the Use Subject Area box, and then select **Environment Health and Safety - Incidents Real Time** from the **Subject Areas** drop down.
4. Click **Next**.
5. On the Select Columns page, click the expand icon in the Subject Areas drop down.
6. Click **Continue**.
7. Select the columns to include in the report and click **Add**.
8. Click **Next**.
9. On the Select Views page, enter a title to display for the analysis.
10. Select the type of table or graph to include. In the **Layout** option, specify the layout of the views, and click **Next**.
11. On the Edit Table page, you can specify more options for the table and click **Next**.
12. On the Edit Graph page, you can specify more options for the graph and click **Next**.
13. On the Sort and Filter page, you can add sorts or filters based on any of the columns you included. Click **Next**.
14. On the Highlights page, if you have a table, you can define conditional formatting for select columns. Click **Next**.
15. On the Save page, enter the name of your analysis and select a folder to save it in.
16. Click **Submit**.

For more information about reports and analysis, see the Human Capital Management Cloud Creating and Administering Analytics and Reports guide.

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7 Frequently Asked Questions (FAQs)

Why can't I link a related incident or inspection?

You may not have an assigned role in the related incident or inspection. You can link an incident or inspection only if you have an assigned role such as the owner or reviewer.

How can I close an incident event, action, investigation, or an inspection?

You must select Completed, Reviewed, or Approved in the incident or inspection Actions page, depending on what's applicable to you as an action owner, reviewer, or approver. Keep in mind that only an owner can reopen a closed action, investigation, or event.

Some points to note about closing an inspection:

- Reviewers and approvers must have signed-off the inspection. An exception to this is when the profile setting ORA_HNS_INSPECTION_AUTO_CLOSE_ENABLED is set to Y. The inspection can be closed by the inspection owner, safety coordinator, or a user with the EHS Manager job role without the reviewers or approvers having signed off .

- Actions can remain open.

- Inspection owner can close the inspection.

How can I delete an incident or inspection?

Only an Environmental Health and Safety Manager can delete an incident or inspection. To delete an incident or inspection, log in to the Health and Safety work area, search for the incident or inspection you want to delete, and click the Delete icon.

How can I reopen an incident or inspection?

Only an Environmental Health and Safety Manager can reopen a closed incident. On the Incident or Inspection Details page, Sign Off section make sure that the Completed check box is unchecked.

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