

User Guide

Microsoft Dynamics 365 for Safety and Quality Management v1.3

September 2024

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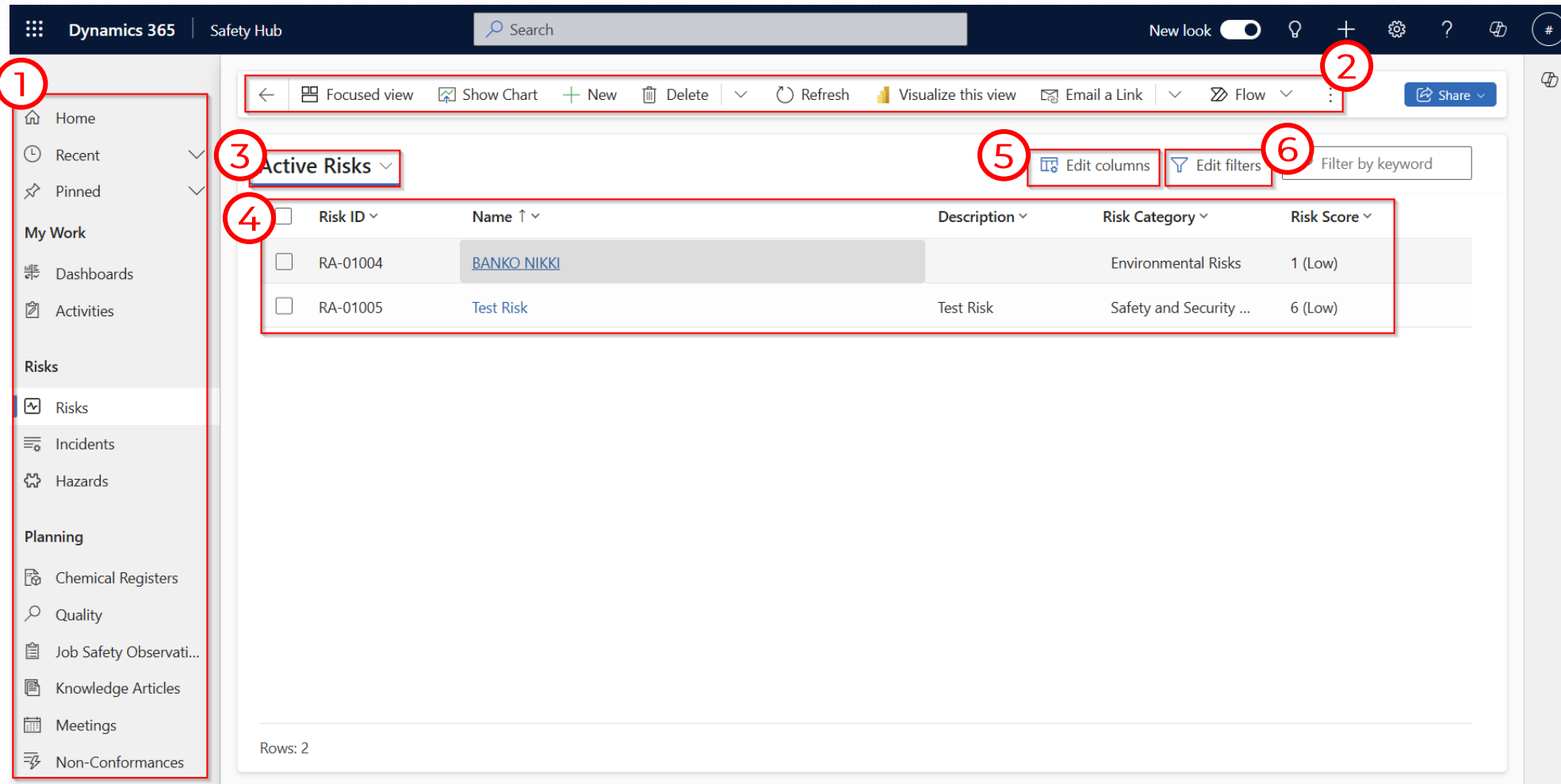
Your Dynamics 365 Project Partner

Contents

- **Risks**
- **Planning**
- **Document Management (SharePoint)**



Navigating the Dynamics 365 Interface



1 Side Menu

2 Command Bar

3 Change View

4 Table

5 Edit Columns

6 Edit Filters

Risk ID	Name	Description	Risk Category	Risk Score
RA-01004	BANKO NIKKI		Environmental Risks	1 (Low)
RA-01005	Test Risk	Test Risk	Safety and Security ...	6 (Low)

Rows: 2

- 1** Side Menu
Contains all modules available for the app.
- 2** Command Bar
Contains various options for the current module.
- 3** Change View
Change the way the current data is presented.
- 4** Table
The list of records for the current module, filtered by the current view. Use it like an Excel spreadsheet.
- 5** Edit Columns
Add or remove existing fields/column headings to the table.
- 6** Edit Filters
Change the advanced filters on the data.

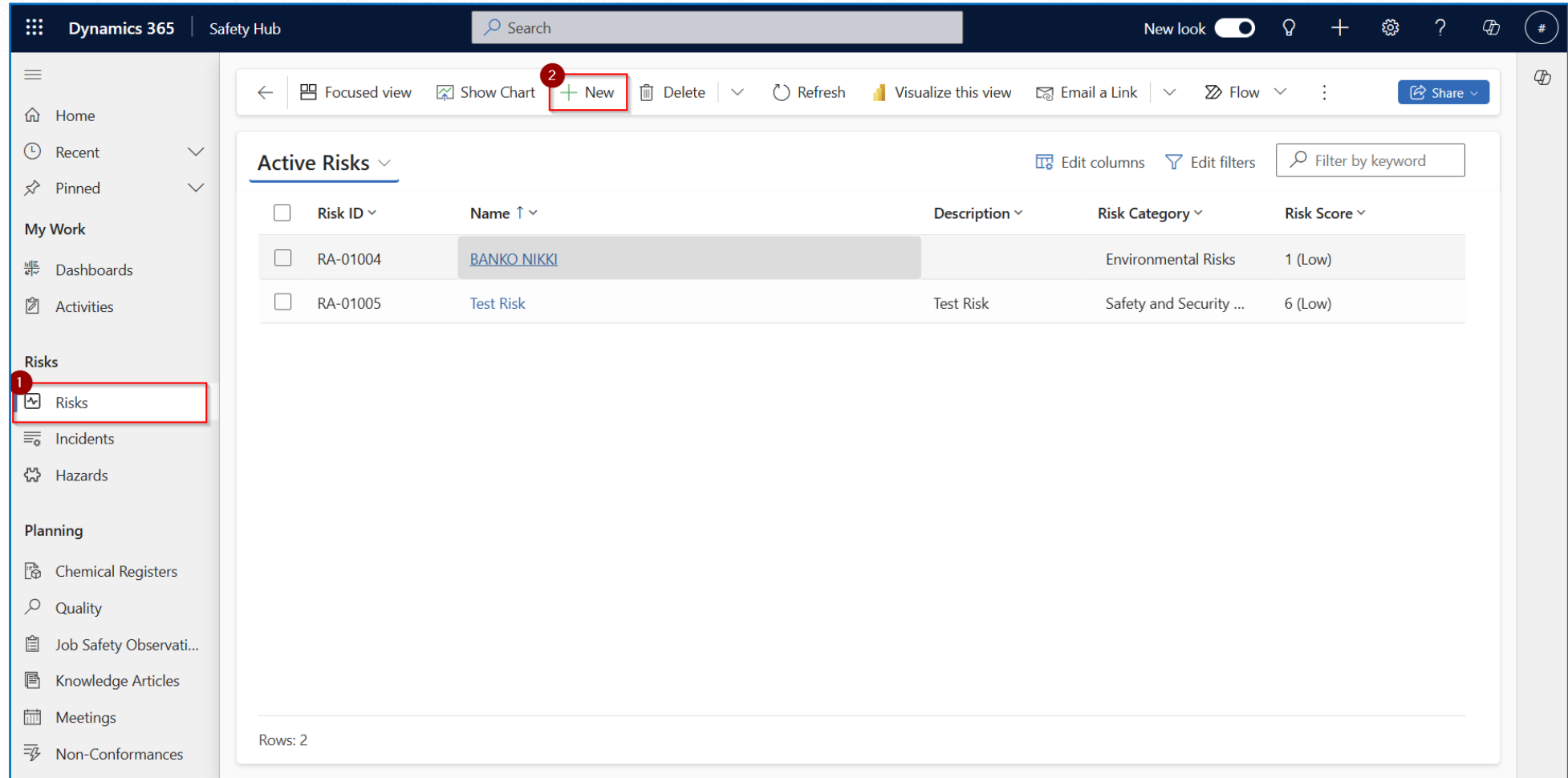
Field Type	Example	Description
Plain Text/Number		Plain text or number. Some fields will limit your character length, or set a particular range for your numbers.
Validated Text Box		Requires the user to input data that matches the prompt. E.G. an email must have an @ symbol and a suffix (.com, .me)
Date Selector		Pick a date with the on-board calendar. If your date settings seem wrong (i.e. American format), go to Personalisation Settings and check your time zone.
Drop Down Select/Multi Select		Select an option from the drop down list. Some lists may have <input type="checkbox"/> square boxes next to each option; this means you can select more than one.
Lookup		Opens a search bar where you can create a relationship to a different kind of record in Dynamics 365. Once set, you can click on the field's content to be taken to that record.

Risks - Risks

This menu stores records of risk assessments for entities such as internal employees, clients, equipment, etc.

1. Go to Risks -> Risks.

2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. The left-hand navigation pane is visible, with the 'Risks' menu item highlighted by a red box and a red circle with the number '1'. The main content area displays a table titled 'Active Risks'. The table has columns for Risk ID, Name, Description, Risk Category, and Risk Score. Two rows are visible: one for 'RA-01004' with the name 'BANKO NIKKI' and a score of 1 (Low), and another for 'RA-01005' with the name 'Test Risk' and a score of 6 (Low). Above the table, there is a toolbar with a '+ New' button highlighted by a red box and a red circle with the number '2'. Other toolbar options include 'Delete', 'Refresh', 'Visualize this view', 'Email a Link', 'Flow', and 'Share'. The top navigation bar shows 'Dynamics 365 | Safety Hub' and a search bar.

Risk ID	Name	Description	Risk Category	Risk Score
RA-01004	BANKO NIKKI		Environmental Risks	1 (Low)
RA-01005	Test Risk	Test Risk	Safety and Security ...	6 (Low)

3. Fill in the required details of the risk assessment and link the related asset. Click Save.

The screenshot displays the Dynamics 365 Safety Hub interface for a 'Test Risk' record. The record is in the 'Implementation' phase of a 25-hour process. The 'Identify' tab is active, showing a list of actions: Identify, Analyse, Evaluate, Treat, Activities, SharePoint, and Related. A red box highlights the 'Save' button in the top command bar, with a red circle and the number '3' next to it. Another red box highlights the 'Asset' field in the 'General Details' section, with a red circle and the number '2' next to it. A dropdown menu is open for the 'Asset' field, showing a list of 'Customer Assets' including 'OMRC Pty Ltd', 'TG01 OMRC Pty Ltd', 'TG01-01 12/06/2024 2:23 PM', '1144 Corbet's Group', and 'AT023 Mine Support Services Pty Ltd'. A red arrow points from the text 'Related fields are grouped into tabs' to the 'Assessment' phase of the process bar. Another red arrow points from the search icon in the dropdown menu to the search icon in the top right corner of the record header.

Test Risk - Unsaved
Risk

#d365admin | Active Status | 25/06/2024 1:45 PM Created On

Risk Register (Active for 50 hours)

Identification | Assessment | Prioritization | Mitigation Planning | Implementation (25 Hrs)

Identify | Analyse | Evaluate | Treat | Activities | SharePoint | Related

General Details

Risk ID: RA-01005

Risk Category: Safety and Security Risks

Asset: AT023 (Customer Assets dropdown open)

Name: Test Risk

Description: Test Risk

Reporting Person: #d365admin

Department: MSS - Maintenance

4. Business process flow provides guided steps in managing the risk assessment throughout its life cycle from Identification to Implementation (of mitigation controls).

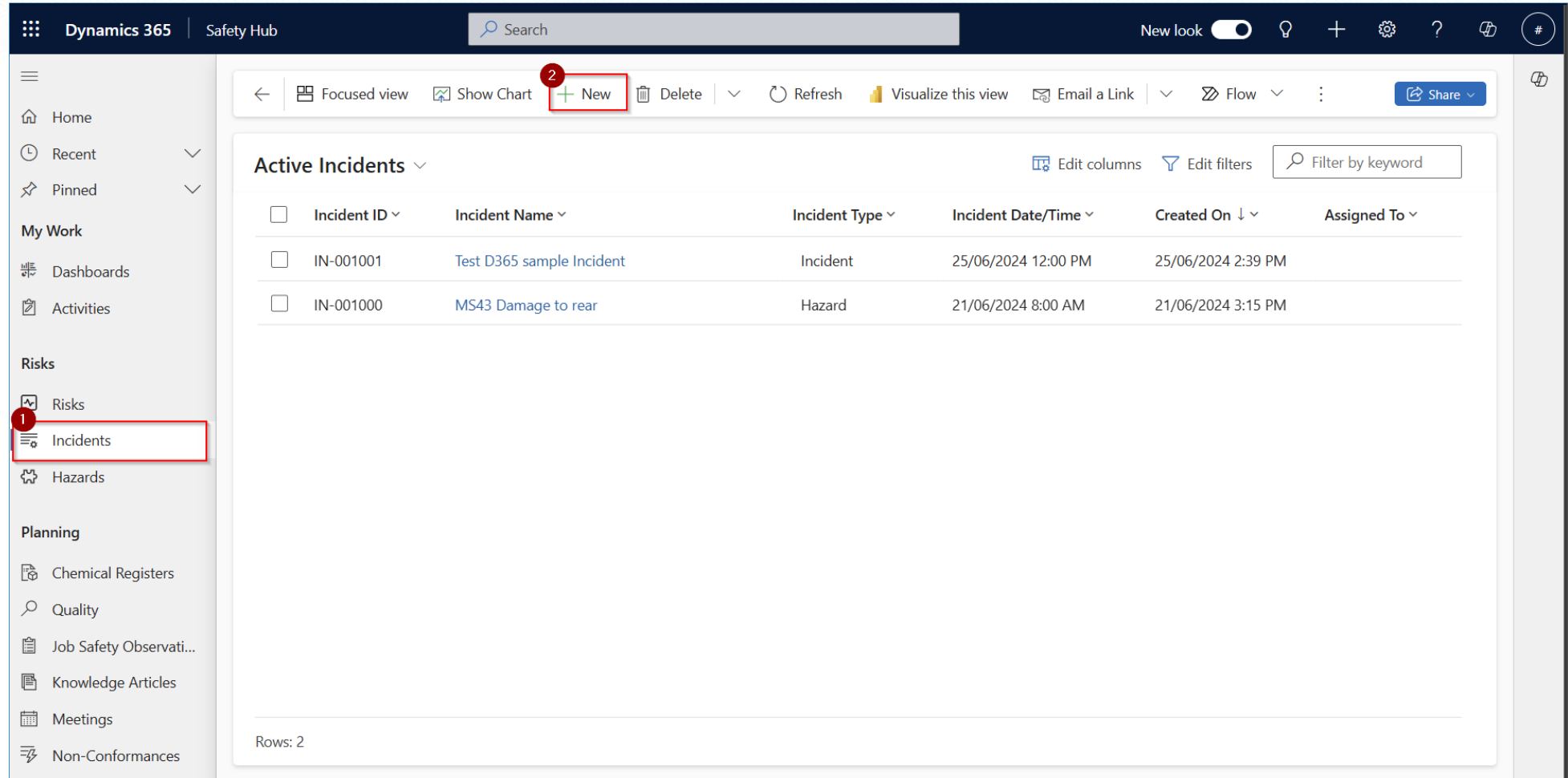
The screenshot displays the Dynamics 365 Safety Hub interface for a 'Test Risk' record. The record is saved and active, created on 25/06/2024 at 1:45 PM by user #d365admin. A process flow bar at the top shows five stages: Identification (24 Hrs), Assessment, Prioritization, Mitigation Planning, and Implementation. The 'Identification (24 Hrs)' stage is currently active. Below the process flow, there are five pop-up windows, each titled 'Next Stage' and containing various risk assessment criteria and options. The first pop-up window is for the 'Identify' stage, showing criteria like Risk Likelihood (Rare), Risk Severity (Moderate), and Compliance (Legal). The other four pop-up windows are for the 'Analyse', 'Evaluate', 'Treat', and 'Activities' stages, each showing similar criteria and a 'Next Stage' button. The main record details include Reporting Person (#d365admin), Department (MSS - Maintenance), and various risk assessment fields like Risk Likelihood, Risk Severity, and Compliance.

Risks - Incidents

This menu stores records of external / internal incidents reported that require resolution.

1. Go to Risks -> Incidents.

2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. On the left, the navigation menu is visible with 'Incidents' highlighted under the 'Risks' section. The main area displays a table of 'Active Incidents' with columns for Incident ID, Incident Name, Incident Type, Incident Date/Time, Created On, and Assigned To. A '+ New' button is highlighted in the top toolbar.

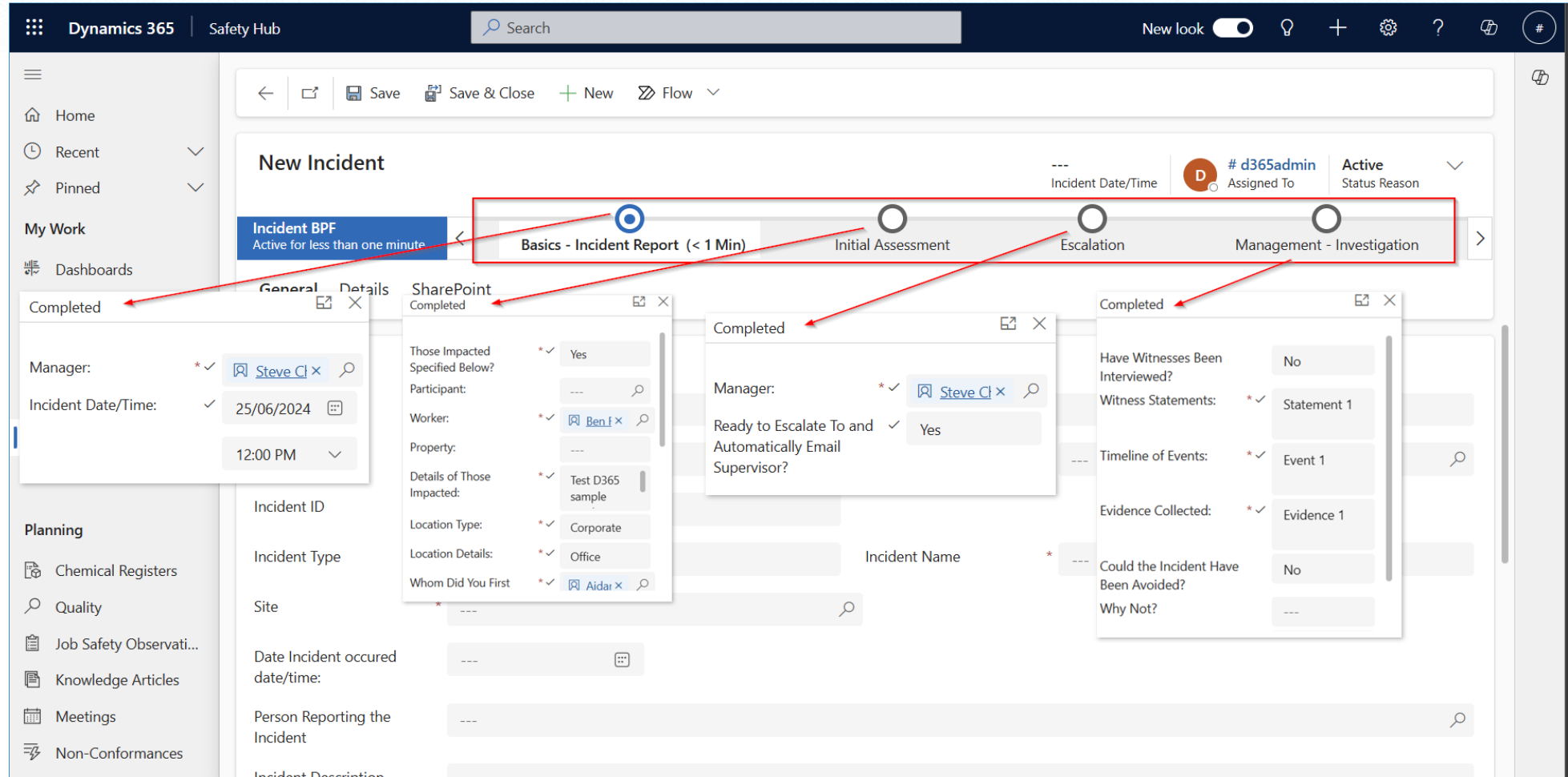
Incident ID	Incident Name	Incident Type	Incident Date/Time	Created On	Assigned To
IN-001001	Test D365 sample Incident	Incident	25/06/2024 12:00 PM	25/06/2024 2:39 PM	
IN-001000	MS43 Damage to rear	Hazard	21/06/2024 8:00 AM	21/06/2024 3:15 PM	

3. Fill in the required details of the incident then link the related asset (to the incident record). Click Save.

Access SharePoint tab to upload files (documents, images, etc.) related to the incident.

The screenshot displays the Dynamics 365 Safety Hub interface for an incident record titled "MS43 Damage to rear - Saved". The interface includes a left-hand navigation pane with sections like "My Work", "Risks", "Planning", and "Non-Conformances". The main content area shows the incident details under the "Basic Details" section, including fields for Report Type (Equipment Damage), Asset No (MS43), Incident ID (IN-001000), Incident Type (Hazard), Site (Grosvenor coal mine), and Incident Date/Time (21/06/2024 8:00 AM). A "Customer Assets" dropdown menu is open, showing a list of assets with a search icon highlighted by a red circle and the number 2. A red arrow points from the text "Related fields are grouped into tabs" to the "Related" tab in the top navigation bar, which is also highlighted with a red circle and the number 1. A red circle with the number 3 highlights the "Save" button in the top toolbar. The incident is assigned to Nikki Banko and has an "Active" status.

4. Business process flow provides guided steps in managing the incident throughout its life cycle from reporting to resolution.



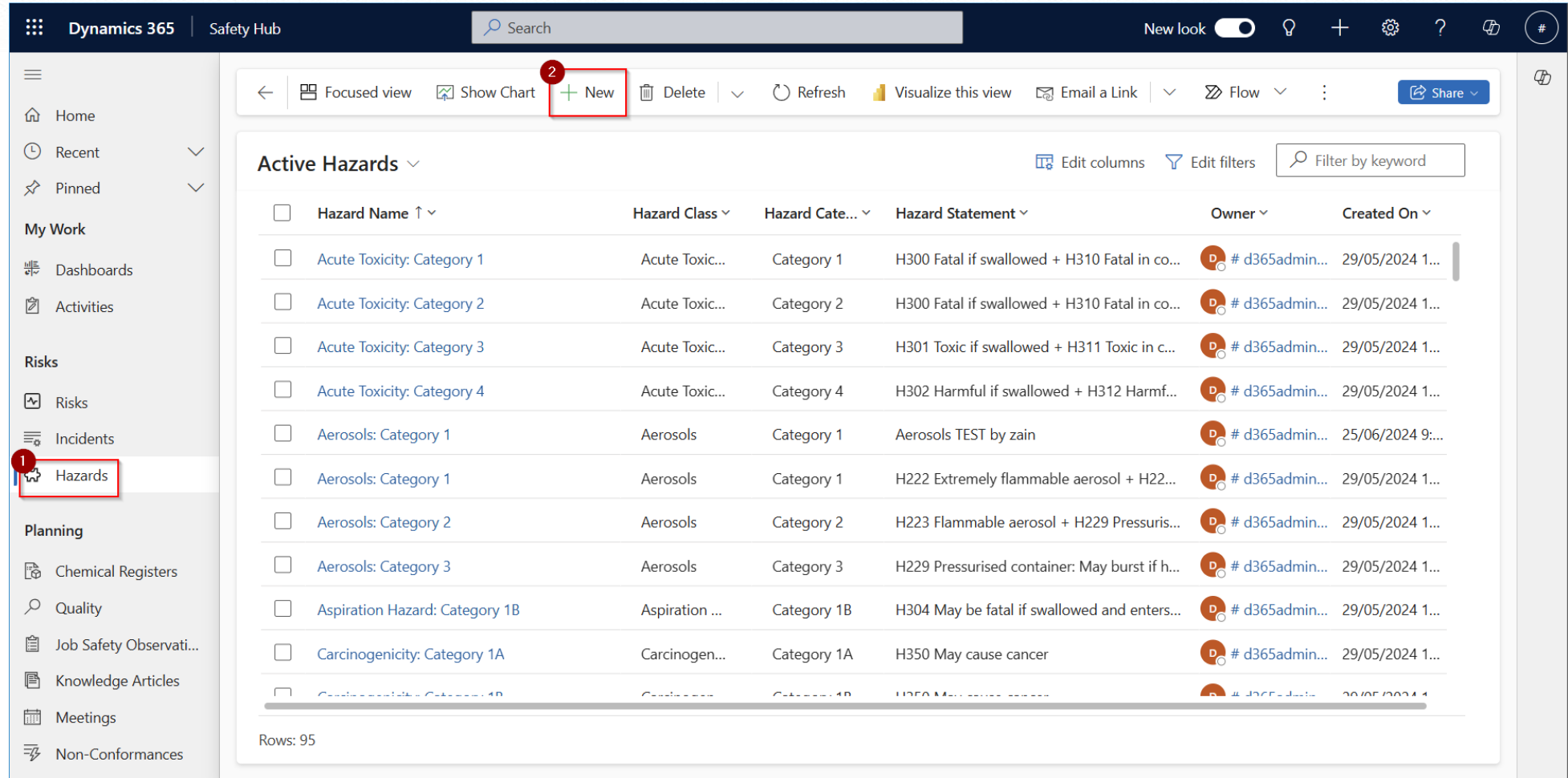
The screenshot displays the Dynamics 365 Safety Hub interface for creating a new incident. At the top, the navigation bar shows 'Dynamics 365 | Safety Hub' and a search bar. The main header includes 'New Incident', 'Incident Date/Time', 'Assigned To' (d365admin), and 'Active' status. Below this is a Business Process Flow (BPF) bar with four steps: 'Basics - Incident Report (< 1 Min)', 'Initial Assessment', 'Escalation', and 'Management - Investigation'. The 'Basics - Incident Report' step is currently active and highlighted with a red box. Below the BPF, there are four pop-up windows, each labeled 'Completed', which are linked to the BPF steps by red arrows. The first pop-up is for the 'Basics' step, containing fields for 'Manager' (Steve Cl), 'Incident Date/Time' (25/06/2024 12:00 PM), and 'Incident ID'. The second pop-up is for 'Initial Assessment', containing fields for 'Participant' (Ben I), 'Worker' (Ben I), 'Property' (Test D365 sample), 'Location Type' (Corporate), 'Location Details' (Office), and 'Whom Did You First' (Aidar). The third pop-up is for 'Escalation', containing fields for 'Manager' (Steve Cl) and 'Ready to Escalate To and Automatically Email Supervisor?' (Yes). The fourth pop-up is for 'Management - Investigation', containing fields for 'Have Witnesses Been Interviewed?' (No), 'Witness Statements' (Statement 1), 'Timeline of Events' (Event 1), 'Evidence Collected' (Evidence 1), and 'Could the Incident Have Been Avoided?' (No). The main form also includes a 'Planning' section on the left with links to 'Chemical Registers', 'Quality', 'Job Safety Observati...', 'Knowledge Articles', 'Meetings', and 'Non-Conformances'. The main form fields include 'Incident Type', 'Site', 'Date Incident occurred date/time', 'Person Reporting the Incident', and 'Incident Description'.

Risks - Hazards

This menu stores records of potential hazards that personnel might encounter in a work site. This is referenced by records in Chemical Registers menu.

1. Go to Risks -> Incidents.

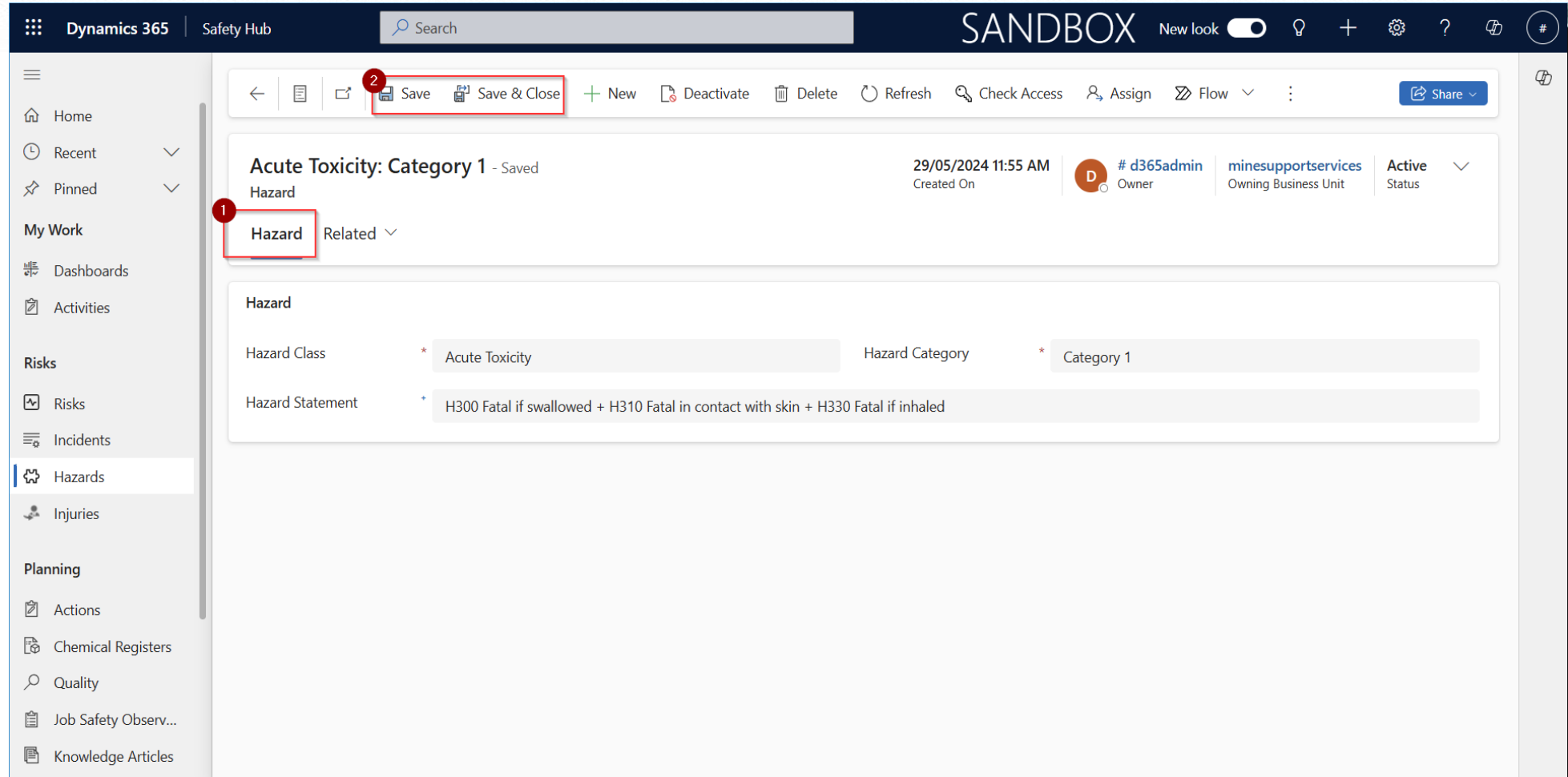
2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. On the left, the navigation menu is visible with 'Hazards' highlighted under the 'Risks' section. In the main area, the 'Active Hazards' list is displayed with columns for Hazard Name, Hazard Class, Hazard Category, Hazard Statement, Owner, and Created On. A '+ New' button is highlighted with a red box and a '2' in a red circle. The table contains 15 rows of hazard records.

<input type="checkbox"/>	Hazard Name ↑	Hazard Class	Hazard Cate...	Hazard Statement	Owner	Created On
<input type="checkbox"/>	Acute Toxicity: Category 1	Acute Toxic...	Category 1	H300 Fatal if swallowed + H310 Fatal in co...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Acute Toxicity: Category 2	Acute Toxic...	Category 2	H300 Fatal if swallowed + H310 Fatal in co...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Acute Toxicity: Category 3	Acute Toxic...	Category 3	H301 Toxic if swallowed + H311 Toxic in c...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Acute Toxicity: Category 4	Acute Toxic...	Category 4	H302 Harmful if swallowed + H312 Harmf...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Aerosols: Category 1	Aerosols	Category 1	Aerosols TEST by zain	# d365admin...	25/06/2024 9:...
<input type="checkbox"/>	Aerosols: Category 1	Aerosols	Category 1	H222 Extremely flammable aerosol + H22...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Aerosols: Category 2	Aerosols	Category 2	H223 Flammable aerosol + H229 Pressuris...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Aerosols: Category 3	Aerosols	Category 3	H229 Pressurised container: May burst if h...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Aspiration Hazard: Category 1B	Aspiration ...	Category 1B	H304 May be fatal if swallowed and enters...	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Carcinogenicity: Category 1A	Carcinogen...	Category 1A	H350 May cause cancer	# d365admin...	29/05/2024 1...
<input type="checkbox"/>	Carcinogenicity: Category 1B	Carcinogen...	Category 1B	H350 May cause cancer	# d365admin...	29/05/2024 1...

3. Fill in the required details of the hazard then click Save.



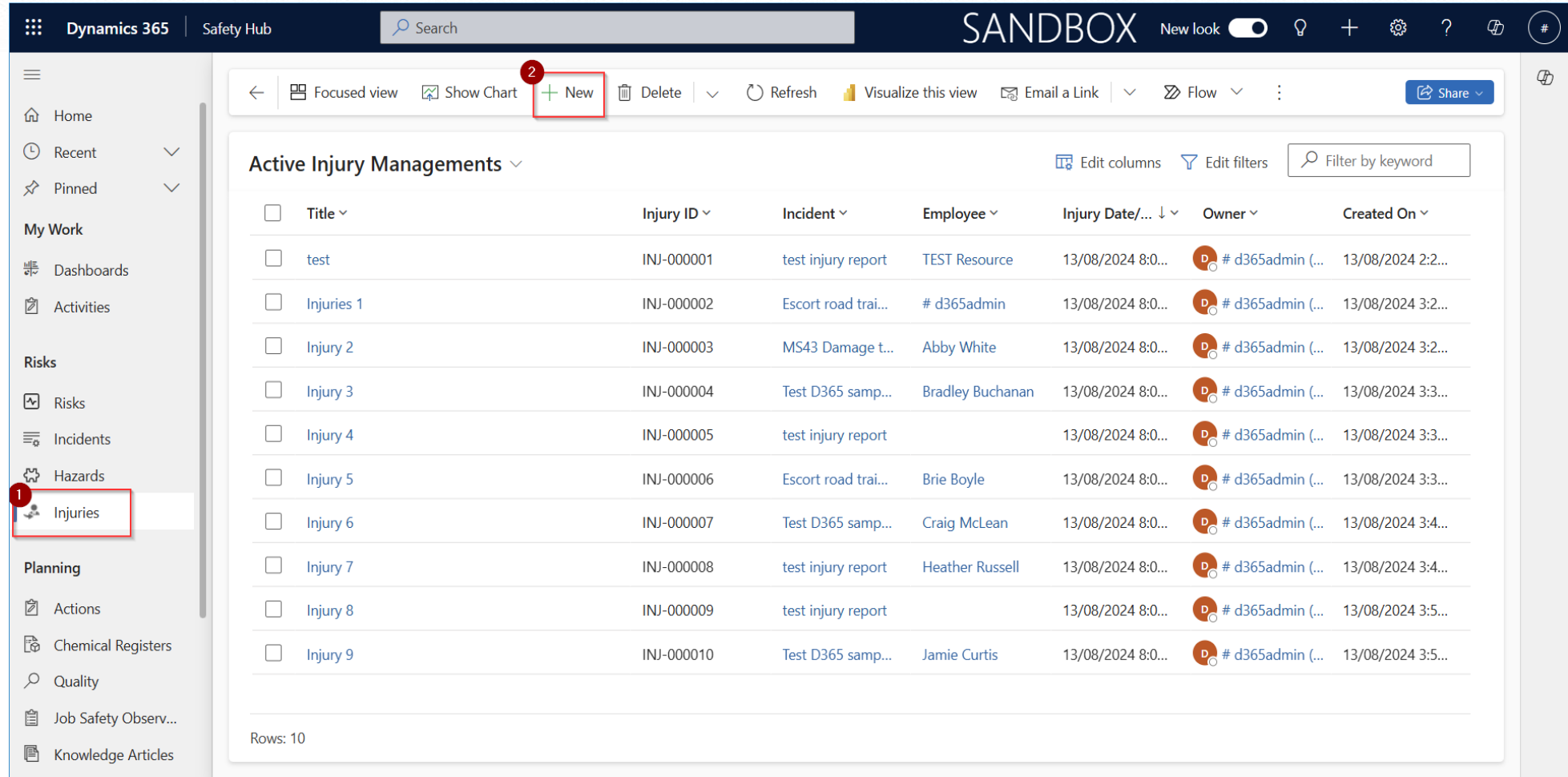
The screenshot displays the Dynamics 365 Safety Hub interface. The top navigation bar includes 'Dynamics 365', 'Safety Hub', a search bar, and the 'SANDBOX' environment. The left-hand navigation pane lists various modules, with 'Hazards' currently selected. The main content area shows a record for 'Acute Toxicity: Category 1 - Saved'. The record details include the creation date '29/05/2024 11:55 AM', the owner '# d365admin', the business unit 'minesupportservices', and the status 'Active'. Below the record header, there is a 'Hazard' section with a 'Related' dropdown. The hazard details are as follows:

Hazard	
Hazard Class *	Acute Toxicity
Hazard Category *	Category 1
Hazard Statement *	H300 Fatal if swallowed + H310 Fatal in contact with skin + H330 Fatal if inhaled

Risks - Injuries

This menu stores records of injury reports that personnel might encounter in a work site.

1. Go to Risks -> Injuries.
2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. The left navigation pane has 'Injuries' highlighted with a red box and a '1' in a red circle. The main area shows a table of 'Active Injury Managements' with a '+ New' button highlighted with a red box and a '2' in a red circle. The table contains 10 rows of injury records.

Title	Injury ID	Incident	Employee	Injury Date/...	Owner	Created On
test	INJ-000001	test injury report	TEST Resource	13/08/2024 8:0...	# d365admin (...)	13/08/2024 2:2...
Injuries 1	INJ-000002	Escort road trai...	# d365admin	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:2...
Injury 2	INJ-000003	MS43 Damage t...	Abby White	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:2...
Injury 3	INJ-000004	Test D365 samp...	Bradley Buchanan	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:3...
Injury 4	INJ-000005	test injury report		13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:3...
Injury 5	INJ-000006	Escort road trai...	Brie Boyle	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:3...
Injury 6	INJ-000007	Test D365 samp...	Craig McLean	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:4...
Injury 7	INJ-000008	test injury report	Heather Russell	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:4...
Injury 8	INJ-000009	test injury report		13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:5...
Injury 9	INJ-000010	Test D365 samp...	Jamie Curtis	13/08/2024 8:0...	# d365admin (...)	13/08/2024 3:5...

3. Fill in the required details of the Injury report then click Save.

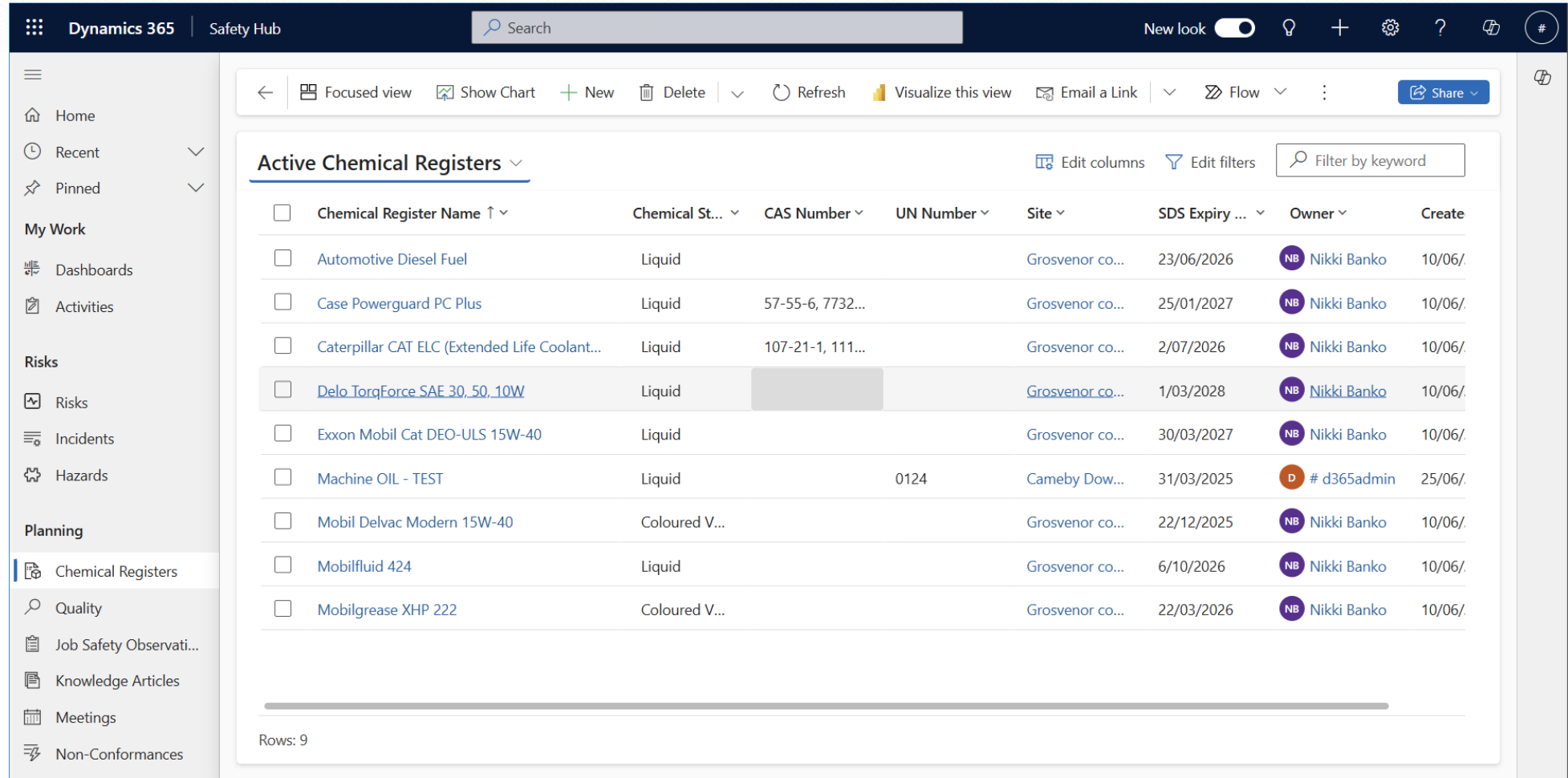
The screenshot displays the Dynamics 365 Safety Hub interface. The top navigation bar includes 'Dynamics 365', 'Safety Hub', a search bar, and the 'SANDBOX' environment. The left sidebar shows navigation options: Home, Recent, Pinned, My Work (Dashboards, Activities), Risks (Risks, Incidents, Hazards, Injuries), and Planning (Actions, Chemical Registers, Quality, Job Safety Observations, Knowledge Articles). The main content area shows a record for 'Injuries 1 - Saved' in 'Injury Management', created on 13/08/2024 at 3:23 PM, with an 'Active' status. The record is owned by '# d365admin' and belongs to the 'MASTER COA' business unit. Below the record header, there are tabs for 'General', 'Work Arrangements', and 'Work Compensation', with a 'Related' dropdown menu. A red box highlights the 'Save' and 'Save & Close' buttons in the top toolbar, and another red box highlights the 'General' tab. A red arrow points from the 'Related' dropdown to the text 'Related fields are grouped into tabs'. The 'General Details' section contains the following fields:

Field	Value
Injury Title	Injuries 1
Injury ID	INJ-000002
Employee	# d365admin
Injury Date/Time	13/08/2024 8:00 AM
Injury Classification	First Aid Injury
External Resources	Resources
Incident	Escort road train out of main gate/ private vehicle interaction
Medical Practitioner	Practitioner

This menu stores records of dangerous chemicals that personnel might encounter in a work site.

1. Go to Planning - > Chemical Registers.

2. Click + New.

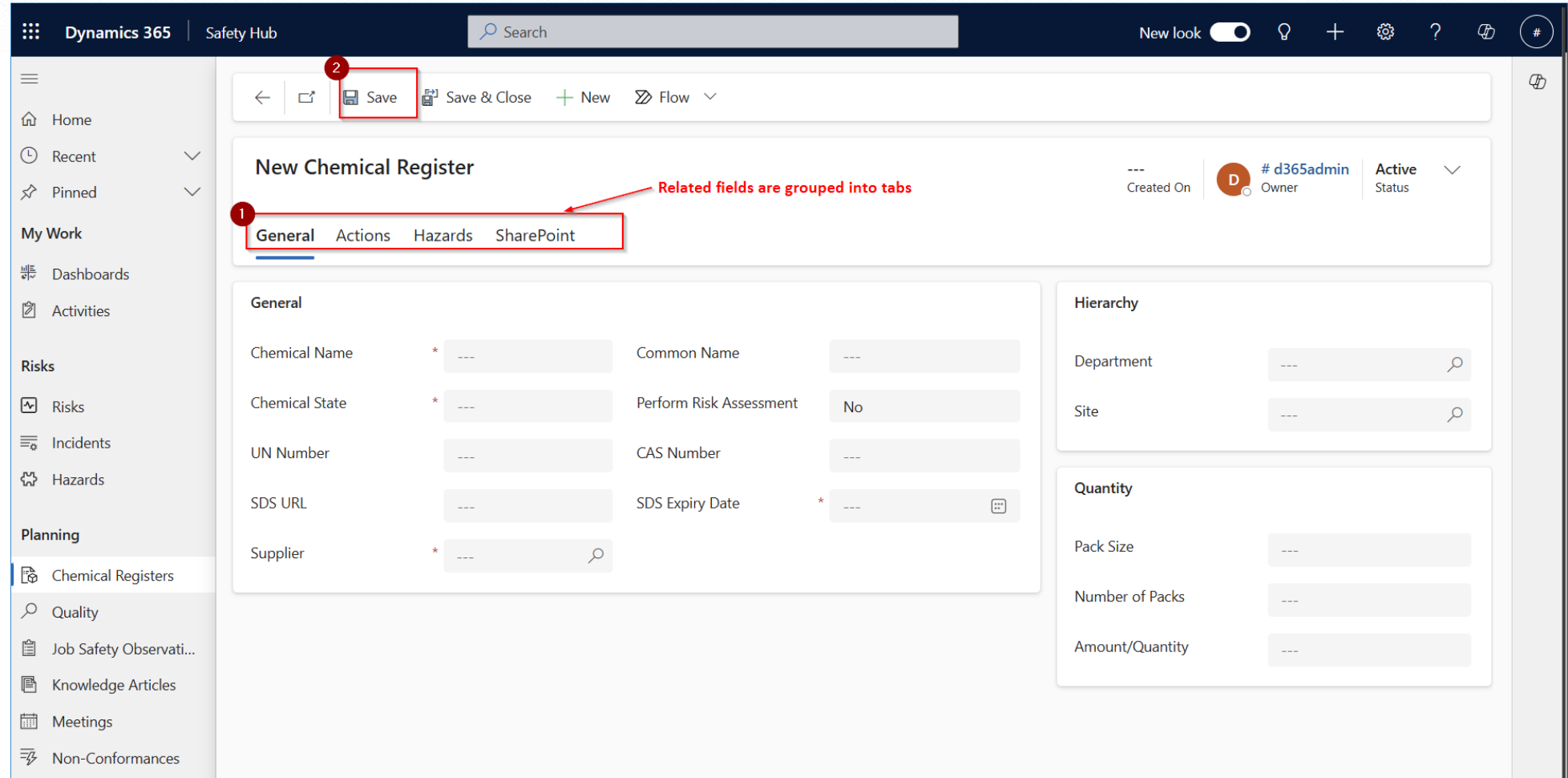


The screenshot displays the Dynamics 365 Safety Hub interface. The left-hand navigation pane includes sections for 'My Work' (Dashboards, Activities), 'Risks' (Risks, Incidents, Hazards), and 'Planning' (Chemical Registers, Quality, Job Safety Observati..., Knowledge Articles, Meetings, Non-Conformances). The main area shows a table titled 'Active Chemical Registers' with columns for Chemical Register Name, Chemical St..., CAS Number, UN Number, Site, SDS Expiry..., Owner, and Create. The table contains 9 rows of data, with the row for 'Delo TorqForce SAE 30_50_10W' highlighted. The interface also features a search bar, a 'New look' toggle, and various action buttons like '+ New', 'Delete', 'Refresh', 'Visualize this view', 'Email a Link', 'Flow', and 'Share'.

<input type="checkbox"/>	Chemical Register Name ↑	Chemical St...	CAS Number	UN Number	Site	SDS Expiry ...	Owner	Create
<input type="checkbox"/>	Automotive Diesel Fuel	Liquid			Grosvenor co...	23/06/2026	NB Nikki Banko	10/06/
<input type="checkbox"/>	Case Powerguard PC Plus	Liquid	57-55-6, 7732...		Grosvenor co...	25/01/2027	NB Nikki Banko	10/06/
<input type="checkbox"/>	Caterpillar CAT ELC (Extended Life Coolant...	Liquid	107-21-1, 111...		Grosvenor co...	2/07/2026	NB Nikki Banko	10/06/
<input type="checkbox"/>	Delo TorqForce SAE 30_50_10W	Liquid			Grosvenor co...	1/03/2028	NB Nikki Banko	10/06/
<input type="checkbox"/>	Exxon Mobil Cat DEO-ULS 15W-40	Liquid			Grosvenor co...	30/03/2027	NB Nikki Banko	10/06/
<input type="checkbox"/>	Machine OIL - TEST	Liquid		0124	Cameby Dow...	31/03/2025	D # d365admin	25/06/
<input type="checkbox"/>	Mobil Delvac Modern 15W-40	Coloured V...			Grosvenor co...	22/12/2025	NB Nikki Banko	10/06/
<input type="checkbox"/>	Mobilfluid 424	Liquid			Grosvenor co...	6/10/2026	NB Nikki Banko	10/06/
<input type="checkbox"/>	Mobilgrease XHP 222	Coloured V...			Grosvenor co...	22/03/2026	NB Nikki Banko	10/06/

3. Fill in the required details of the chemical record then click Save.

Access SharePoint tab to upload files (documents, images, etc.) related to the incident.



The screenshot shows the Dynamics 365 Safety Hub interface for creating a new chemical register. The left navigation pane is open, showing the 'Planning' section with 'Chemical Registers' selected. The main content area displays the 'New Chemical Register' form. The 'General' tab is active, showing fields for Chemical Name, Chemical State, UN Number, SDS URL, Supplier, Common Name, Perform Risk Assessment, CAS Number, and SDS Expiry Date. A red box highlights the 'Save' button in the top toolbar, and another red box highlights the 'SharePoint' tab. A red arrow points to the 'SharePoint' tab with the text 'Related fields are grouped into tabs'. The right side of the form shows 'Hierarchy' (Department, Site) and 'Quantity' (Pack Size, Number of Packs, Amount/Quantity) sections.

4. Go to the Hazards tab and assign the hazards posed by the chemical stated in the record. Repeat steps as needed if adding multiple records.

The screenshot displays the Dynamics 365 Safety Hub interface for a record titled "Automotive Diesel Fuel". The interface includes a top navigation bar with "Dynamics 365" and "Safety Hub", a search bar, and a right-hand side with "New look" toggle, user profile "Nikki Banko", and "Active Status". Below the navigation is a toolbar with actions like "Save", "Save & Close", "New", "Deactivate", "Delete", "Refresh", "Check Access", "Assign", and "Share".

The main content area shows the "Automotive Diesel Fuel - Saved" record with tabs for "General", "Actions", "Hazards", "SharePoint", and "Related". The "Hazards" tab is selected and highlighted with a red box and a red circle labeled "1". Below the tabs is a table with columns for "Actions" and "Hazard Name". The "Actions" column contains a list of hazard categories, which is expanded to show a scrollable list of specific hazard codes and descriptions. This list is highlighted with a red box and a red circle labeled "4".

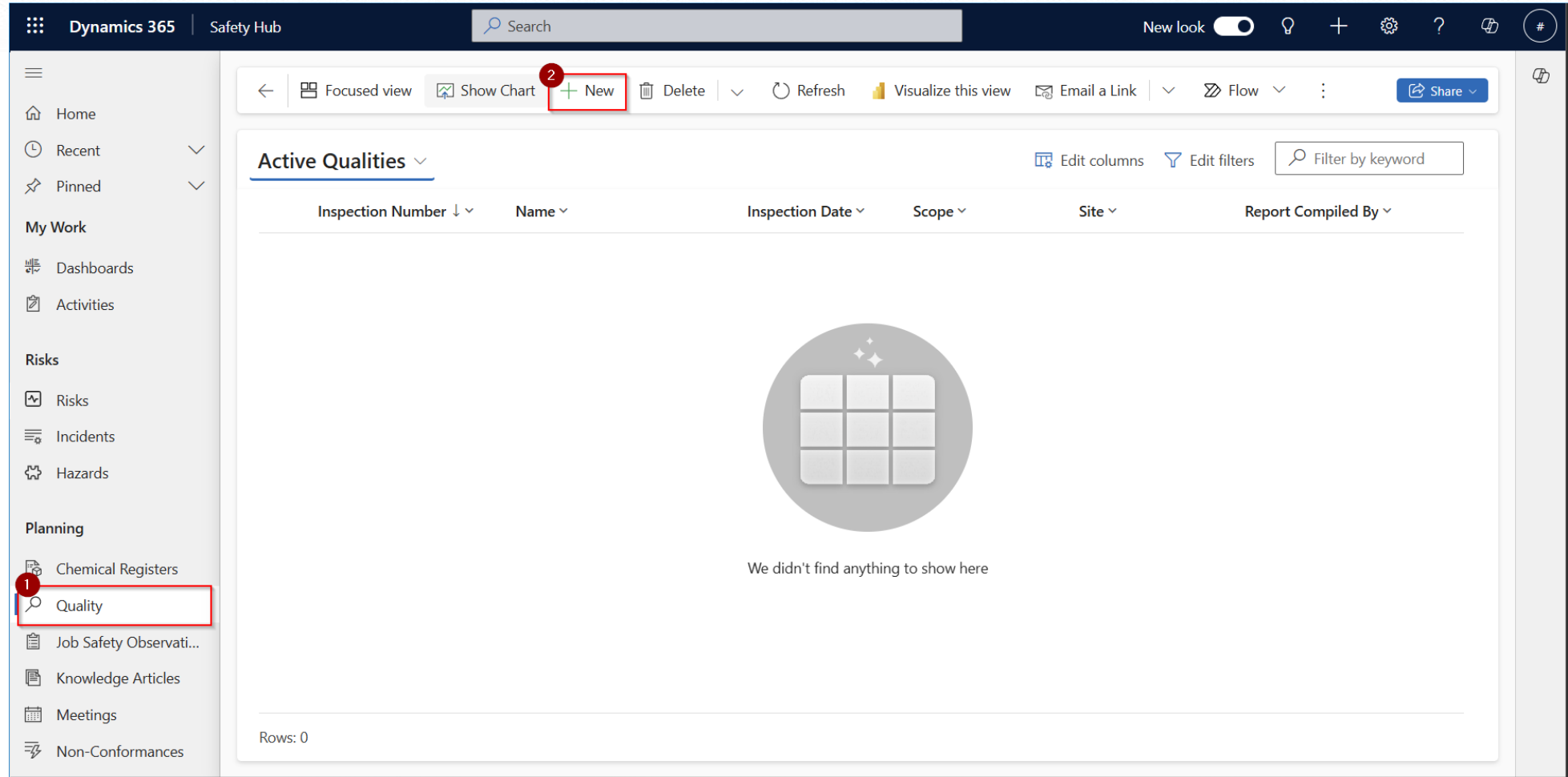
Overlaid on the interface is a "Lookup Records" dialog box. It has a search bar labeled "Look for records" with a red circle labeled "3" around it. Below the search bar are "Recent records" and "All records" tabs. A list of records is shown, including "Acute Toxicity: Category 1" and "Acute Toxicity: Category 4". A red box and red circle labeled "2" highlight the "Add Existing Hazard" button. At the bottom of the dialog, there is an "Add" button (highlighted with a red box and red circle labeled "5") and a "Cancel" button.

Planning – Quality

This menu stores records of inspection review results completed by employees.

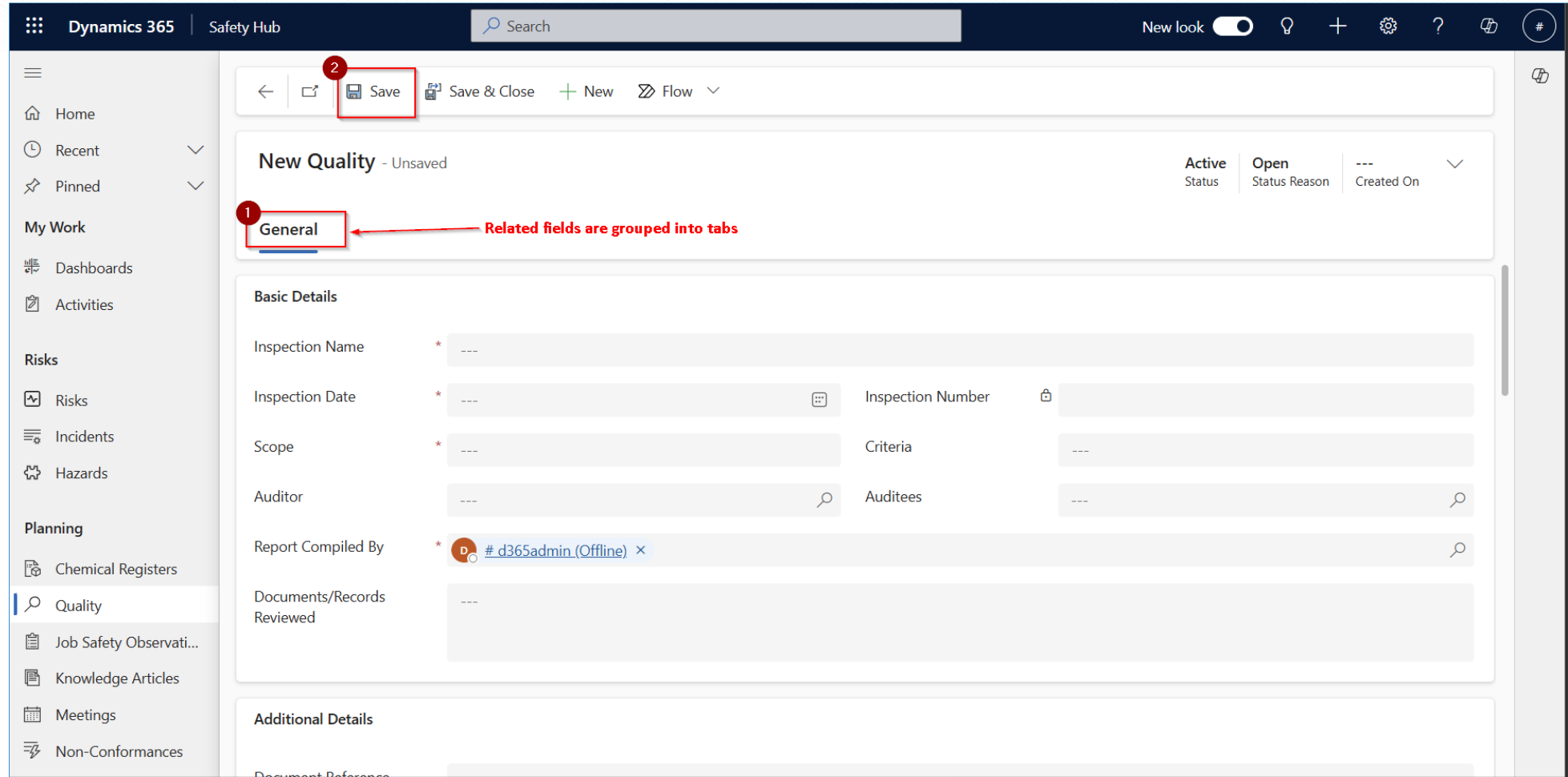
1. Go to Planning - > Quality.

2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. The left-hand navigation pane is visible, with the 'Quality' option under the 'Planning' section highlighted with a red box and a red circle containing the number '1'. The main content area displays the 'Active Qualities' table. The table has columns for 'Inspection Number', 'Name', 'Inspection Date', 'Scope', 'Site', and 'Report Compiled By'. The table is currently empty, with a message 'We didn't find anything to show here' and a grid icon. The top navigation bar includes a search bar, a 'New look' toggle, and various utility icons. The top right of the main content area has a toolbar with options like 'Focused view', 'Show Chart', '+ New' (highlighted with a red box and a red circle containing the number '2'), 'Delete', 'Refresh', 'Visualize this view', 'Email a Link', 'Flow', and 'Share'.

3. Fill in the required details of the record then click Save.



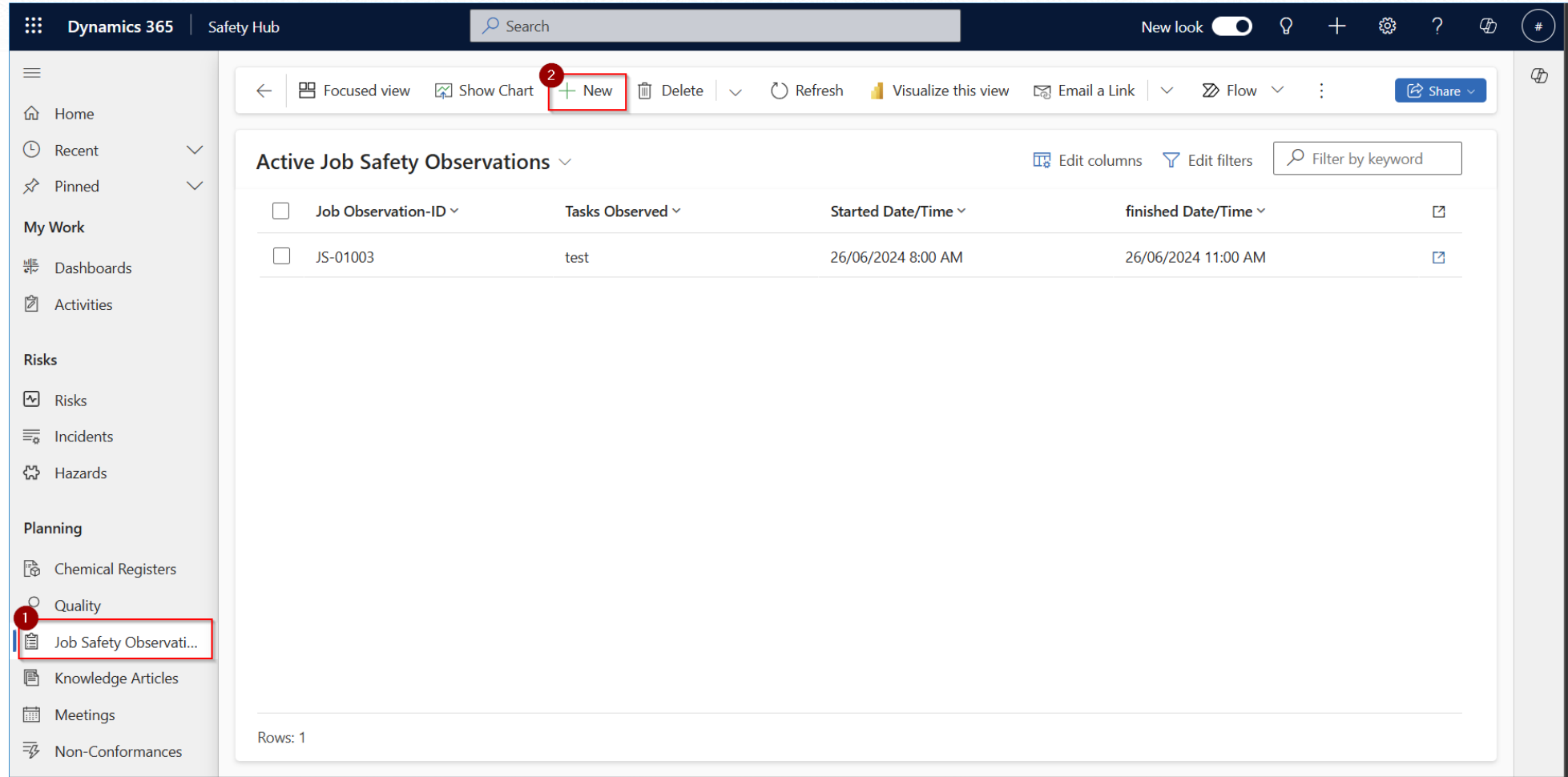
The screenshot shows the Dynamics 365 Safety Hub interface for creating a new Quality record. The top navigation bar includes 'Dynamics 365 | Safety Hub', a search bar, and a 'New look' toggle. The left-hand navigation pane lists various modules, with 'Quality' selected under the 'Planning' section. The main content area is titled 'New Quality - Unsaved' and features a 'Save' button highlighted with a red box and the number '2'. Below the title bar, there are tabs for 'General', 'Inspection Details', and 'Additional Details', with 'General' highlighted by a red box and the number '1'. A red arrow points to the 'General' tab with the text 'Related fields are grouped into tabs'. The 'Basic Details' section contains several fields: 'Inspection Name' (required), 'Inspection Date' (required), 'Inspection Number' (locked), 'Scope' (required), 'Criteria', 'Auditor', 'Auditees', 'Report Compiled By' (filled with '# d365admin (Offline)'), and 'Documents/Records Reviewed'. The 'Additional Details' section is partially visible at the bottom.

Planning – Job Safety Observations

This menu stores records of job safety reviews done by employees.

1. Go to Planning - > Job Safety Observations.

2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. The left navigation pane is open, showing the 'Planning' section with 'Job Safety Observations' highlighted. The main area displays a table of 'Active Job Safety Observations' with one record: JS-01003, test, 26/06/2024 8:00 AM, 26/06/2024 11:00 AM. The '+ New' button in the top toolbar is highlighted with a red box and a '2' in a red circle. The 'Job Safety Observations' menu item in the left pane is also highlighted with a red box and a '1' in a red circle.

Job Observation-ID	Tasks Observed	Started Date/Time	finished Date/Time
JS-01003	test	26/06/2024 8:00 AM	26/06/2024 11:00 AM

- 3. Fill in the required details of the job safety observation then link the related asset. Click Save.

General Related ▾

General

Job Observation ID JS-01003 Asset

Observer-One Edward Sayward ×

Observer-Two Brie Boyle ×

Observer-Three Ian Hodge ×

Started Date/Time 26/06/2024 8:00 AM Finished Date/Time

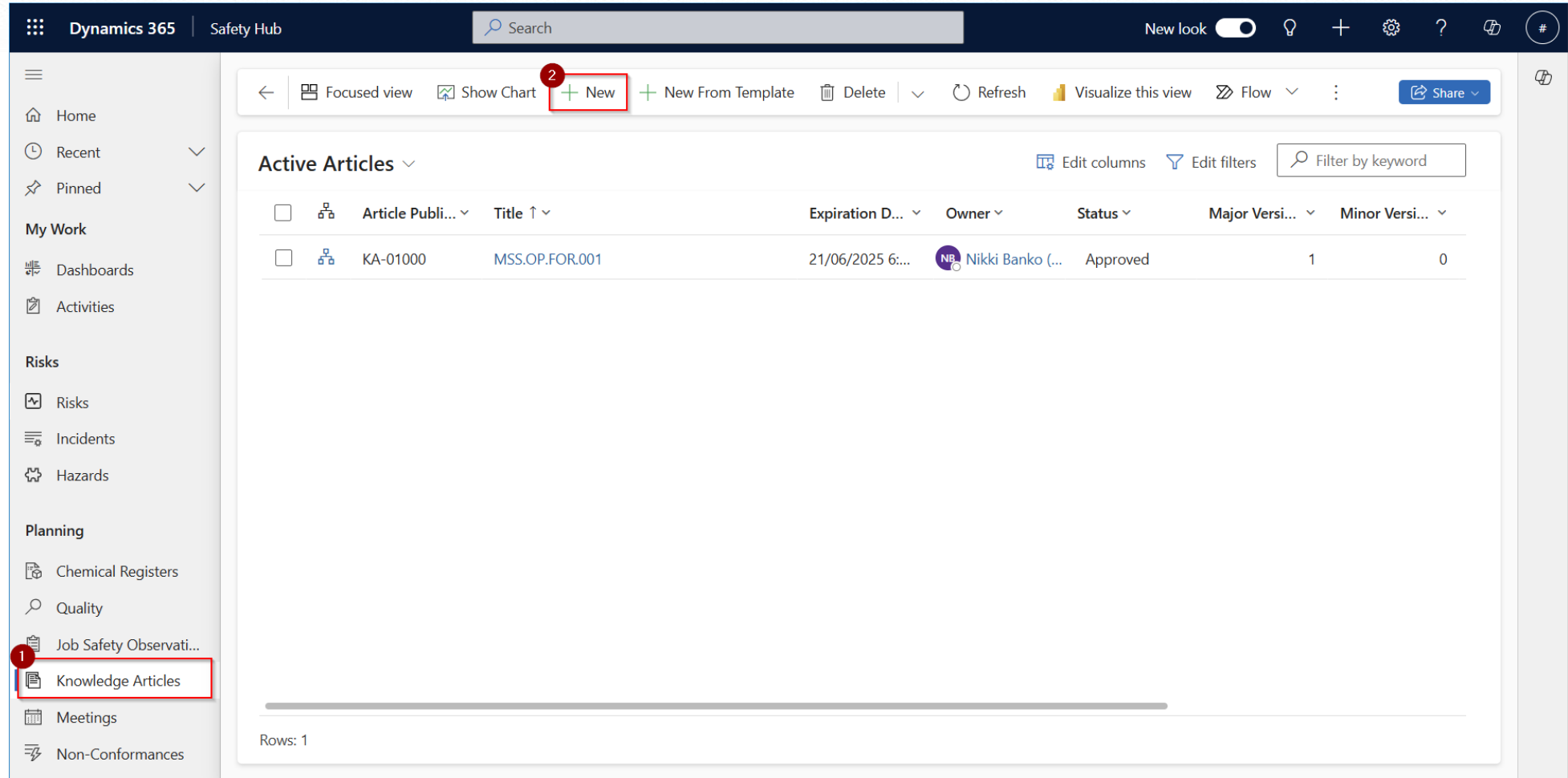
Tasks Observed test

Observations

Category ▾	Class ▾	Observation Details ▾	Observation Result ▾
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This menu is an internal repository of company documents on various subjects.

1. Go to Planning - > Knowledge Articles.
2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. The left-hand navigation pane is visible, with the 'Knowledge Articles' option under the 'Planning' section highlighted with a red box and a red circle containing the number '1'. The main content area displays a table of 'Active Articles'. The table has columns for 'Article Publi...', 'Title', 'Expiration D...', 'Owner', 'Status', 'Major Versi...', and 'Minor Versi...'. A single row is visible with the following data: 'KA-01000', 'MSS.OP.FOR.001', '21/06/2025 6...', 'Nikki Banko (...)', 'Approved', '1', and '0'. The '+ New' button in the top toolbar is highlighted with a red box and a red circle containing the number '2'. The bottom of the screen shows 'Rows: 1'.

3. Fill in the required details then click Save.

Save Save & Close + New + New From Template Add to Queue Assign Refresh Check Access Share

MSS.OP.FOR.001 - Saved Knowledge Article English - United States Language Approved Status Reason

New Process Active for 5 days Author (5 D) Review Publish

Content Summary Analytics Related

Article Public Number * KA-01000

Primary Author Id Nikki Banko

Language * English - United St...

Major Version Number * 1

Minor Version Number * 0

Created By Nikki Banko (Offline)

Created On 21/06/2024 2:46 PM

There's not enough information to generate highlights.

Recent

- Modified on: 25/06/2024 10:14 AM
Appointment from: # d365admin
Overdue
Sample Appointment - Kevin Pisigan - 25/...
This is a sample appointment for testing ...
View more
- Modified on: 25/06/2024 10:11 AM
Task modified by: # d365admin
Active
Sample Task - Kevin Pisigan - 25/06/2024
This is a sample task for testing purposes

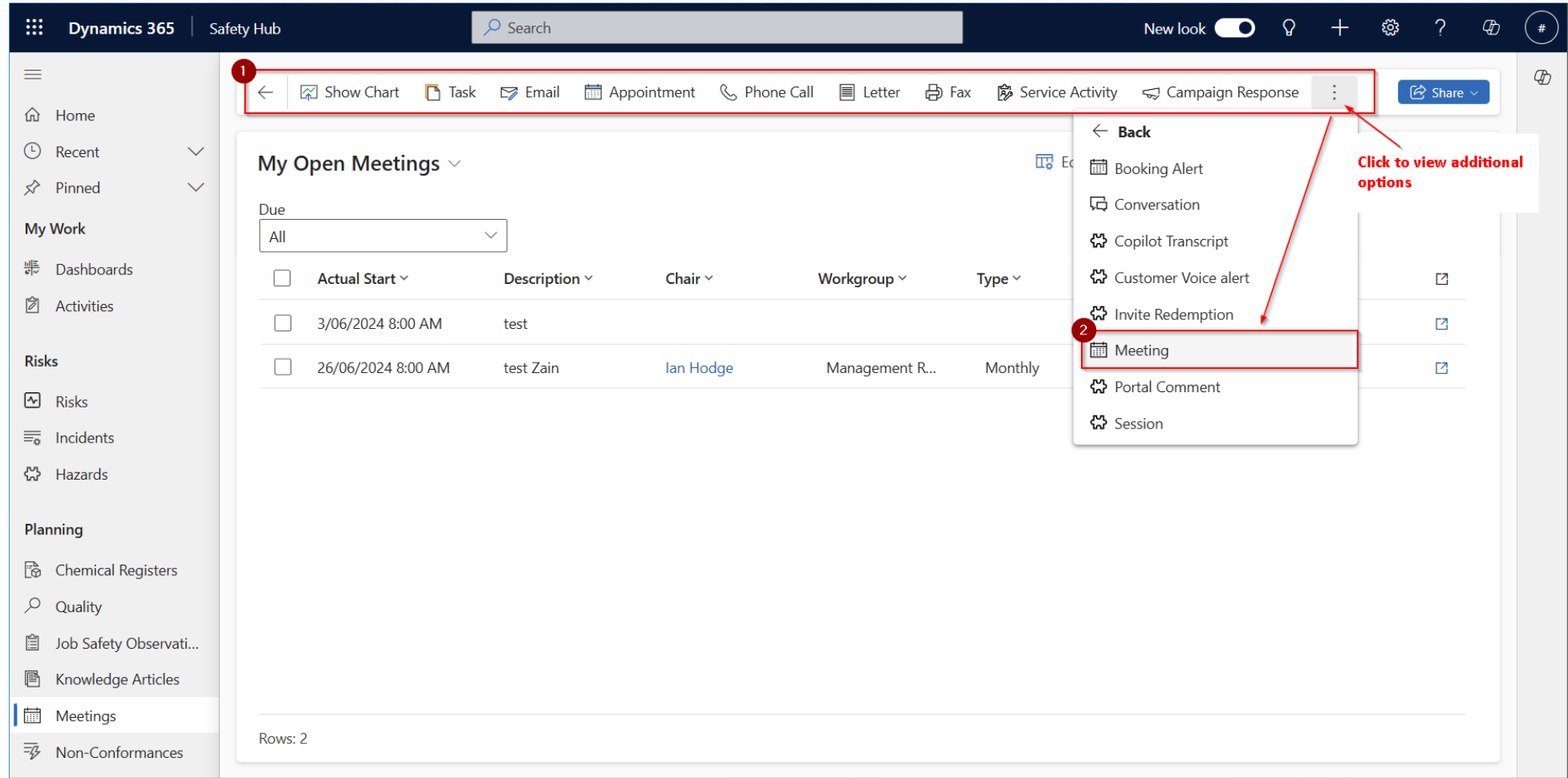
1 - 1 of 1 Page 1

4. Business process flow provides guided steps in managing the Knowledge Article throughout its life cycle from creation to publishing.

The screenshot displays the Dynamics 365 Knowledge Article editor interface. At the top, a navigation bar shows 'Dynamics 365 | Safety Hub' and a search bar. A warning banner at the top right states: 'Please use the attachments function in the knowledge article editor instead of adding attachments in the notes section to search for knowledge article attachments in the portal. If you have "Sync knowledge article attachments to portal" turned on, then knowledge article attachments will automatically be synced to the notes attachment here. Learn more at https://go.microsoft.com/fwlink/p/?linkid=2172080.' Below this, a toolbar contains actions like Save, Save & Close, New, New From Template, Add to Queue, Assign, Refresh, Check Access, and Share. The main content area shows a 'Knowledge Article' titled 'MSS.OP.FOR.001 - Saved' with a language of 'English - United States' and a status of 'Approved'. A business process flow is visible, consisting of three stages: 'New Process' (Active for 5 days), 'Author (5 D)', 'Review', and 'Publish'. A red box highlights these stages, with red arrows pointing to their respective configuration pop-ups. The 'New Process' pop-up shows 'Active for 5 days'. The 'Author' pop-up shows 'Equipment Inspection' and 'Assign Primary Author' (Nikki B.). The 'Review' pop-up shows 'Approved' and 'Mark for Review' (Mark Complete). The 'Publish' pop-up shows 'Set Product Associations' (Completed) and 'Set Expiration Date' (21/06/2025, 6:00 PM). The background shows a list of knowledge articles with columns for ID, Title, Author, and Created On.

This menu allows users to create office activities (e.g., Creating meetings, sending emails, etc.).

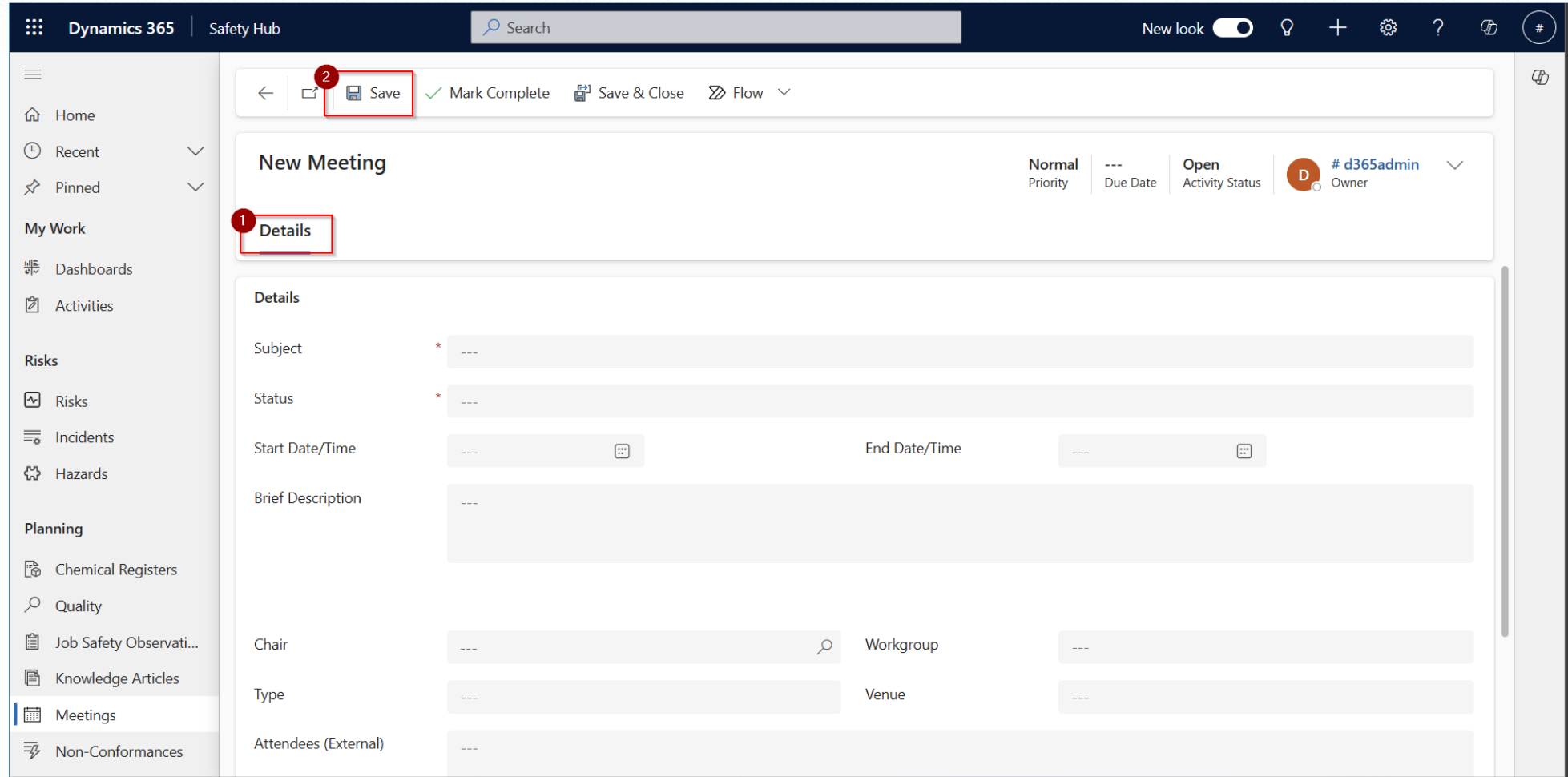
1. Go to Planning - > Meetings.
2. Select the activity of choice. Refer to attached screenshot.



The screenshot shows the Dynamics 365 Safety Hub interface. The top navigation bar includes 'Dynamics 365 | Safety Hub', a search bar, and various utility icons. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Dashboards, Activities), Risks (Risks, Incidents, Hazards), Planning (Chemical Registers, Quality, Job Safety Observati..., Knowledge Articles, Meetings, Non-Conformances), and a 'Share' button. The main content area displays a table titled 'My Open Meetings' with columns for 'Actual Start', 'Description', 'Chair', 'Workgroup', and 'Type'. Two rows of data are visible. A context menu is open over the table, listing options: Back, Booking Alert, Conversation, Copilot Transcript, Customer Voice alert, Invite Redemption, Meeting (highlighted), Portal Comment, and Session. A red box highlights the context menu options, and a red arrow points to the 'Meeting' option with the text 'Click to view additional options'. A red circle with the number '1' is placed over the context menu trigger icon, and a red circle with the number '2' is placed over the 'Meeting' option.

Actual Start	Description	Chair	Workgroup	Type
3/06/2024 8:00 AM	test			
26/06/2024 8:00 AM	test Zain	Ian Hodge	Management R...	Monthly

3. Fill in the required details then click Save.



Dynamics 365 | Safety Hub Search New look

← Save ✓ Mark Complete Save & Close Flow

New Meeting

Normal Priority --- Due Date Open Activity Status #d365admin Owner

1 Details

Details

Subject * ---

Status * ---

Start Date/Time --- End Date/Time ---

Brief Description ---

Chair --- Workgroup ---

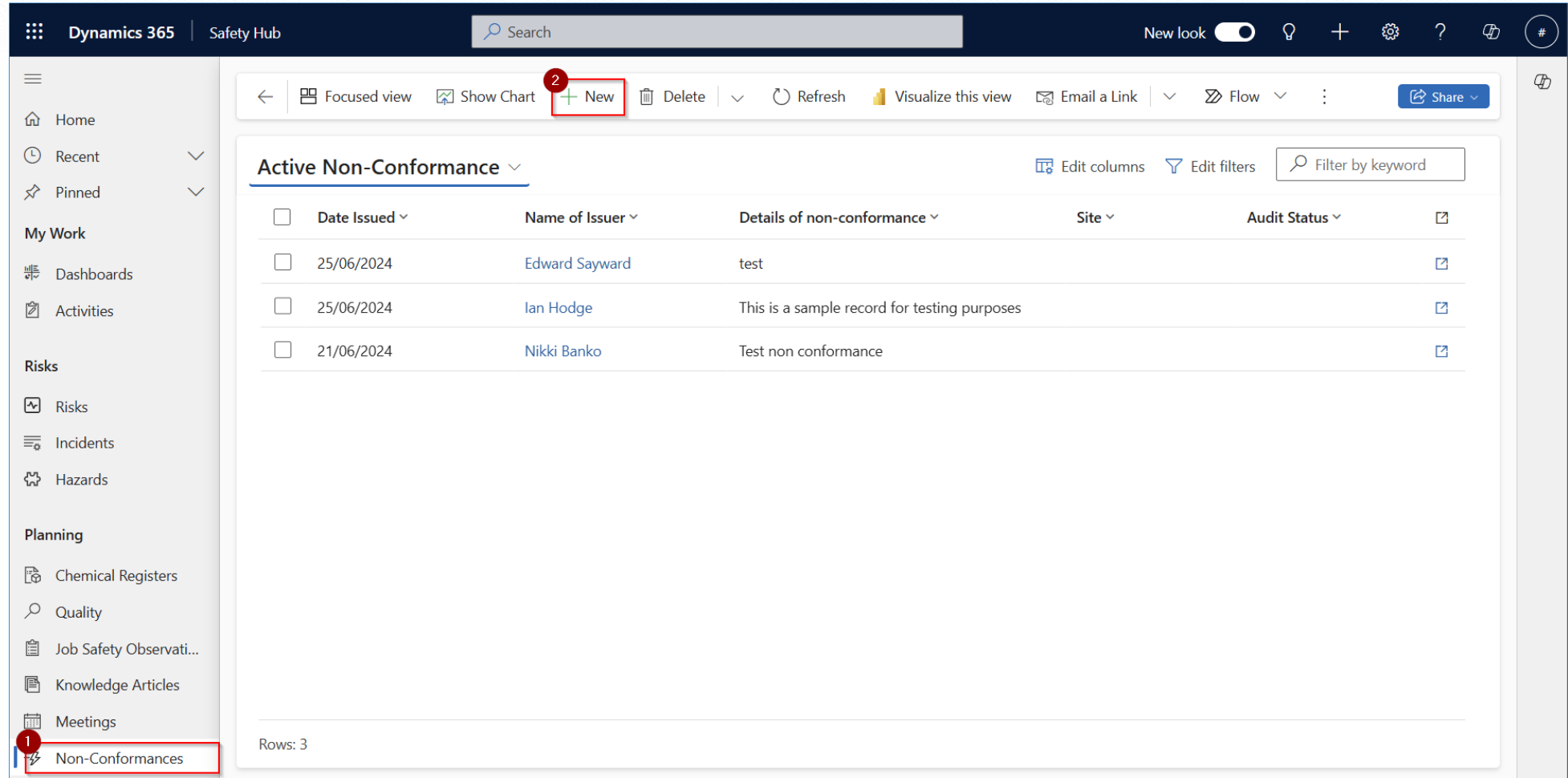
Type --- Venue ---

Attendees (External) ---

Planning – Non-Conformances

This menu displays records of instances of non-compliance to organization standards (e.g., quality, Training, Maintenance, etc.).

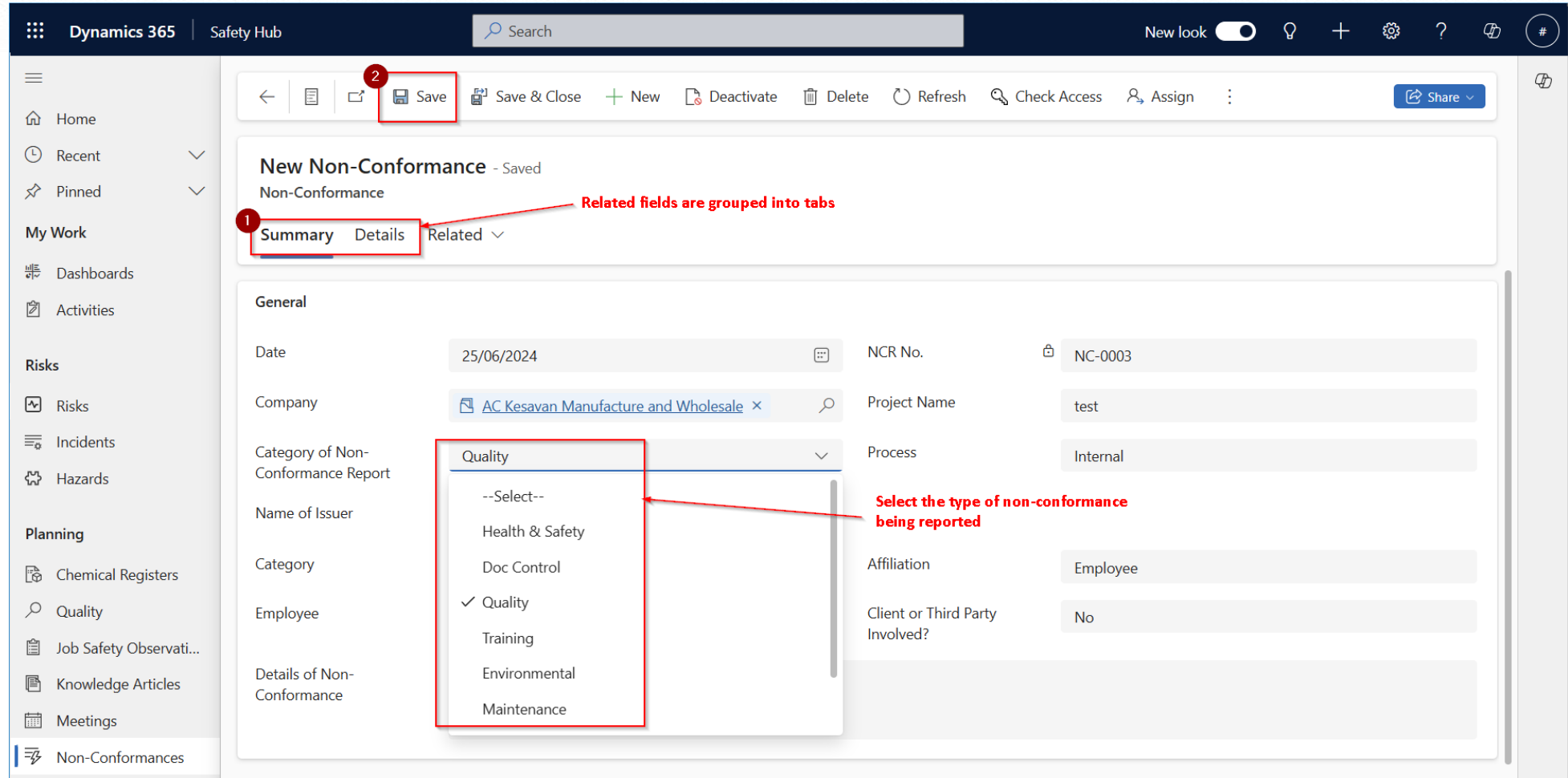
1. Go to Planning - > Non-Conformances.
2. Click + New.



The screenshot shows the Dynamics 365 Safety Hub interface. The left-hand navigation pane is open, and the 'Non-Conformances' option under the 'Planning' section is highlighted with a red box and a red circle containing the number '1'. The main content area displays a table titled 'Active Non-Conformance' with a '+ New' button highlighted by a red box and a red circle containing the number '2'. The table contains three rows of data.

<input type="checkbox"/>	Date Issued	Name of Issuer	Details of non-conformance	Site	Audit Status	<input type="checkbox"/>
<input type="checkbox"/>	25/06/2024	Edward Sayward	test			<input type="checkbox"/>
<input type="checkbox"/>	25/06/2024	Ian Hodge	This is a sample record for testing purposes			<input type="checkbox"/>
<input type="checkbox"/>	21/06/2024	Nikki Banko	Test non conformance			<input type="checkbox"/>

3. Fill in the required details then click Save.



2 Save

1 Summary Details Related

Related fields are grouped into tabs

Select the type of non-conformance being reported

General

Date: 25/06/2024

NCR No.: NC-0003

Company: AC Kesavan Manufacture and Wholesale

Project Name: test

Category of Non-Conformance Report: Quality

Process: Internal

Name of Issuer: --Select--

Affiliation: Employee

Category: Health & Safety

Employee: Quality

Client or Third Party Involved?: No

Doc Control

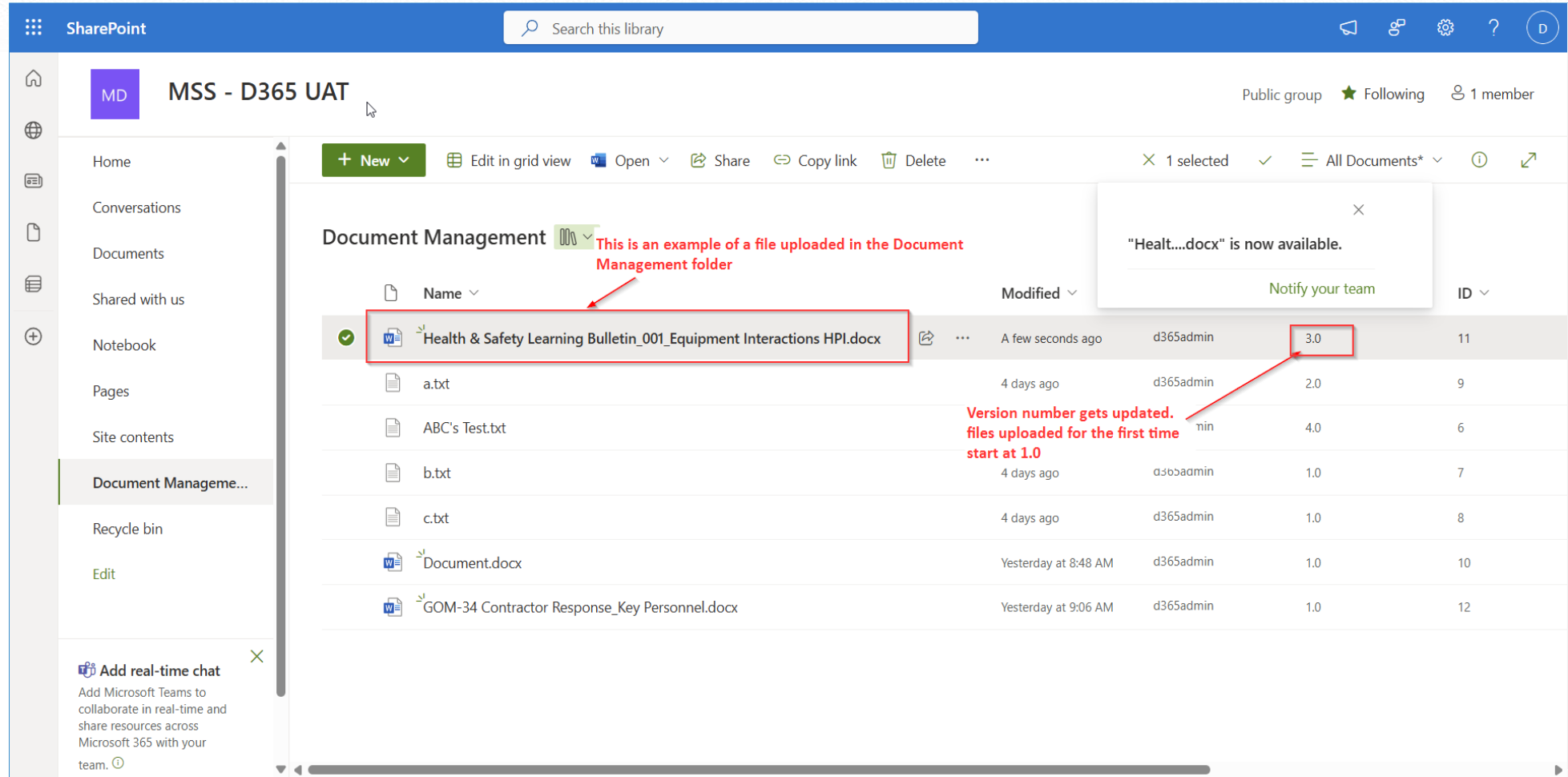
Training

Environmental

Maintenance

This menu serves as the document repository for users in their daily operations for various work-related purposes.

1. Go to Links -> SharePoint Document Management.
2. Download/upload an existing/new file in the Document Management folder. If updating an existing file, make sure the filename is the same.

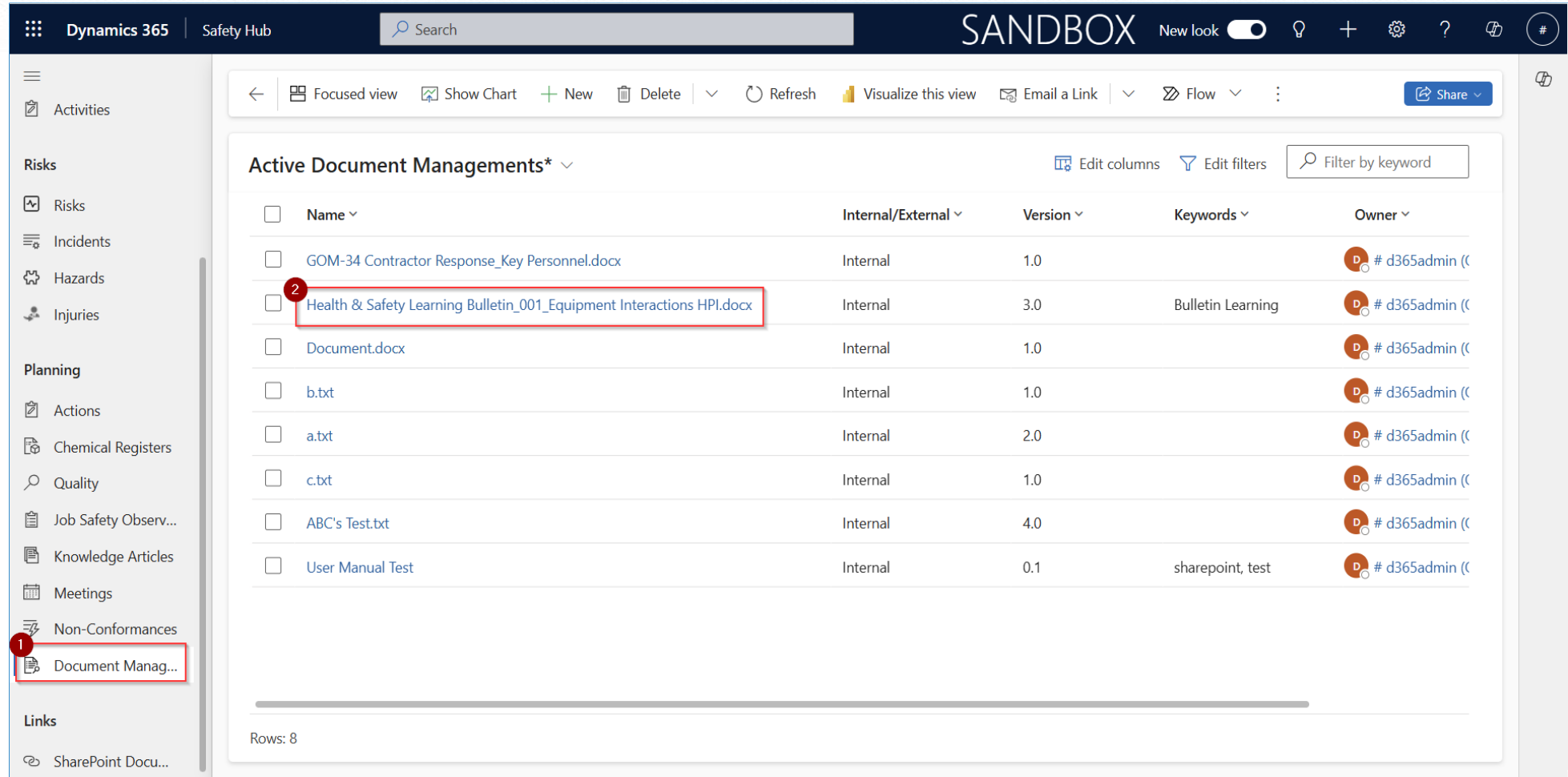


The screenshot shows the SharePoint interface for a document library named "MSS - D365 UAT". The "Document Management" folder is selected. A table lists several documents, with the first one highlighted. Red annotations explain that the version number for files uploaded for the first time starts at 1.0 and is updated for subsequent uploads.

Name	Modified	Created By	Version	ID
Health & Safety Learning Bulletin_001_Equipment Interactions HPI.docx	A few seconds ago	d365admin	3.0	11
a.txt	4 days ago	d365admin	2.0	9
ABC's Test.txt			4.0	6
b.txt	4 days ago	d365admin	1.0	7
c.txt	4 days ago	d365admin	1.0	8
Document.docx	Yesterday at 8:48 AM	d365admin	1.0	10
GOM-34 Contractor Response_Key Personnel.docx	Yesterday at 9:06 AM	d365admin	1.0	12

3. Go to Planning - > Document Management

4. Click the filename of the uploaded SharePoint file to view its details.



Dynamics 365 | Safety Hub

Search

SANDBOX New look

Activities

Risks

Incidents

Hazards

Injuries

Planning

Actions

Chemical Registers

Quality

Job Safety Observ...

Knowledge Articles

Meetings

Non-Conformances

Document Manag...

Links

SharePoint Docu...

Focused view Show Chart + New Delete Refresh Visualize this view Email a Link Flow Share

Active Document Managements*

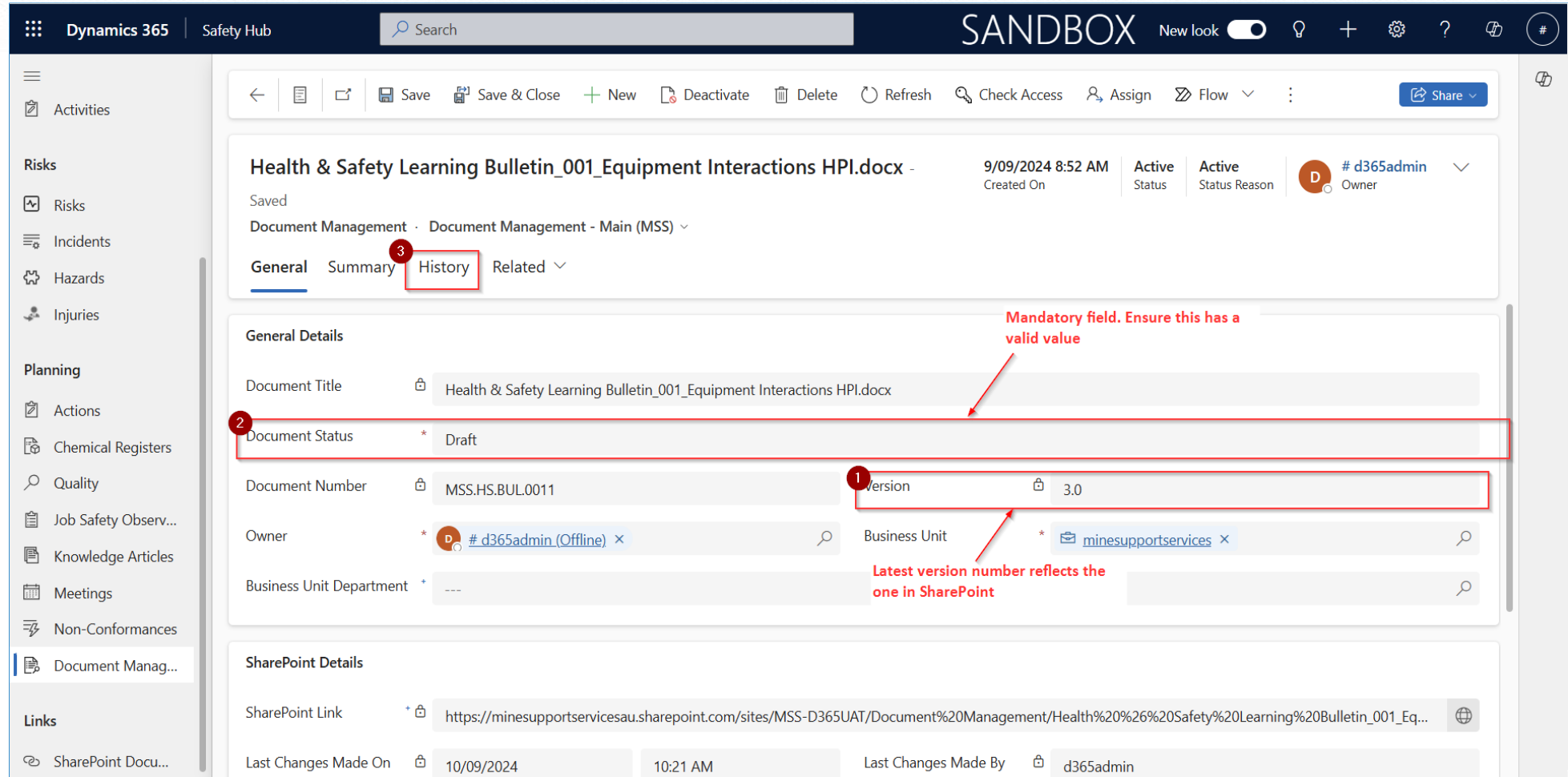
Edit columns Edit filters Filter by keyword

<input type="checkbox"/>	Name	Internal/External	Version	Keywords	Owner
<input type="checkbox"/>	GOM-34 Contractor Response_Key Personnel.docx	Internal	1.0		d365admin
<input type="checkbox"/>	Health & Safety Learning Bulletin_001_Equipment Interactions HPI.docx	Internal	3.0	Bulletin Learning	d365admin
<input type="checkbox"/>	Document.docx	Internal	1.0		d365admin
<input type="checkbox"/>	b.txt	Internal	1.0		d365admin
<input type="checkbox"/>	a.txt	Internal	2.0		d365admin
<input type="checkbox"/>	c.txt	Internal	1.0		d365admin
<input type="checkbox"/>	ABC's Test.txt	Internal	4.0		d365admin
<input type="checkbox"/>	User Manual Test	Internal	0.1	sharepoint, test	d365admin

Rows: 8

5. General tab displays document version number, SharePoint link and other information. Ensure Document Status has a valid value.

6. Click the History tab.



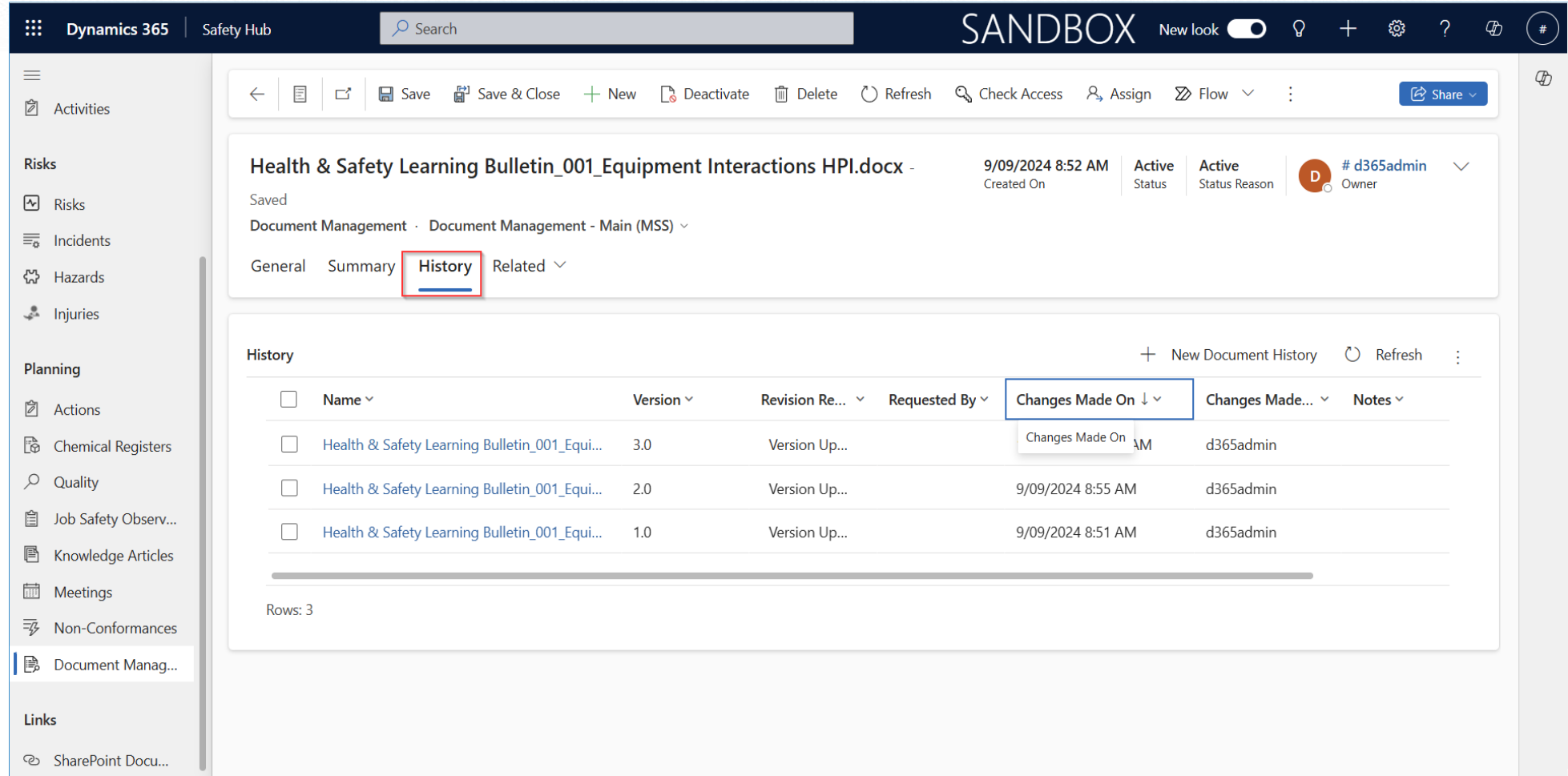
General Details

Document Title	Health & Safety Learning Bulletin_001_Equipment Interactions HPI.docx
Document Status	Draft
Document Number	MSS.HS.BUL0011
Version	3.0
Owner	#d365admin (Offline)
Business Unit	minesupportservices
Business Unit Department	---

SharePoint Details

SharePoint Link	https://minesupportservicesau.sharepoint.com/sites/MSS-D365UAT/Document%20Management/Health%20%26%20Safety%20Learning%20Bulletin_001_Eq...
Last Changes Made On	10/09/2024 10:21 AM
Last Changes Made By	d365admin

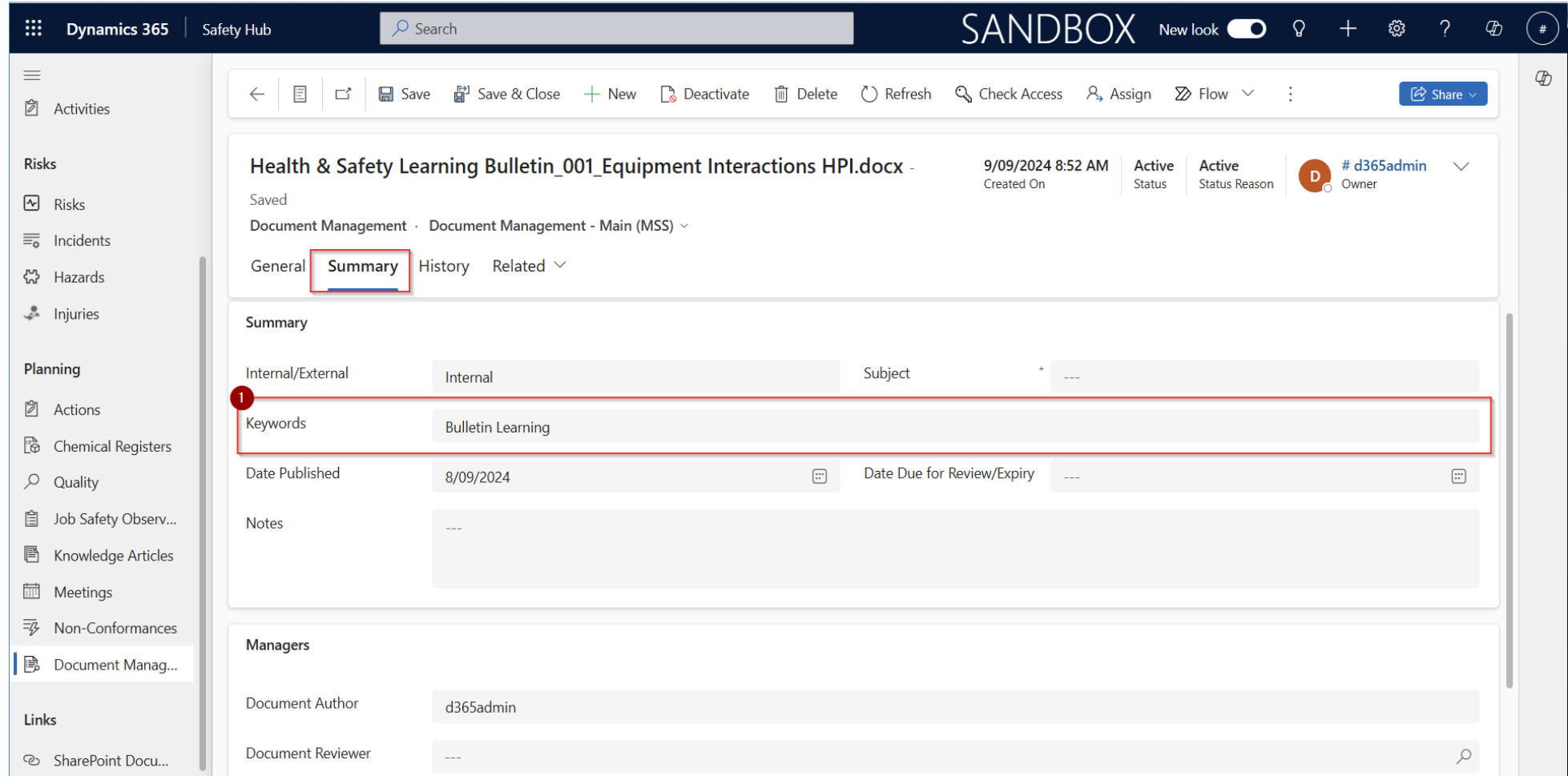
7. History tab shows previous uploads of the existing document.



The screenshot displays the Dynamics 365 interface for document management. The top navigation bar includes 'Dynamics 365 | Safety Hub', a search bar, and the 'SANDBOX' environment. The left sidebar shows various modules, with 'Document Management' selected. The main content area shows a document titled 'Health & Safety Learning Bulletin_001_Equipment Interactions HPI.docx'. The 'History' tab is active and highlighted with a red box. Below the document details, a table lists the document's history, with the 'Changes Made On' column highlighted by a blue box.

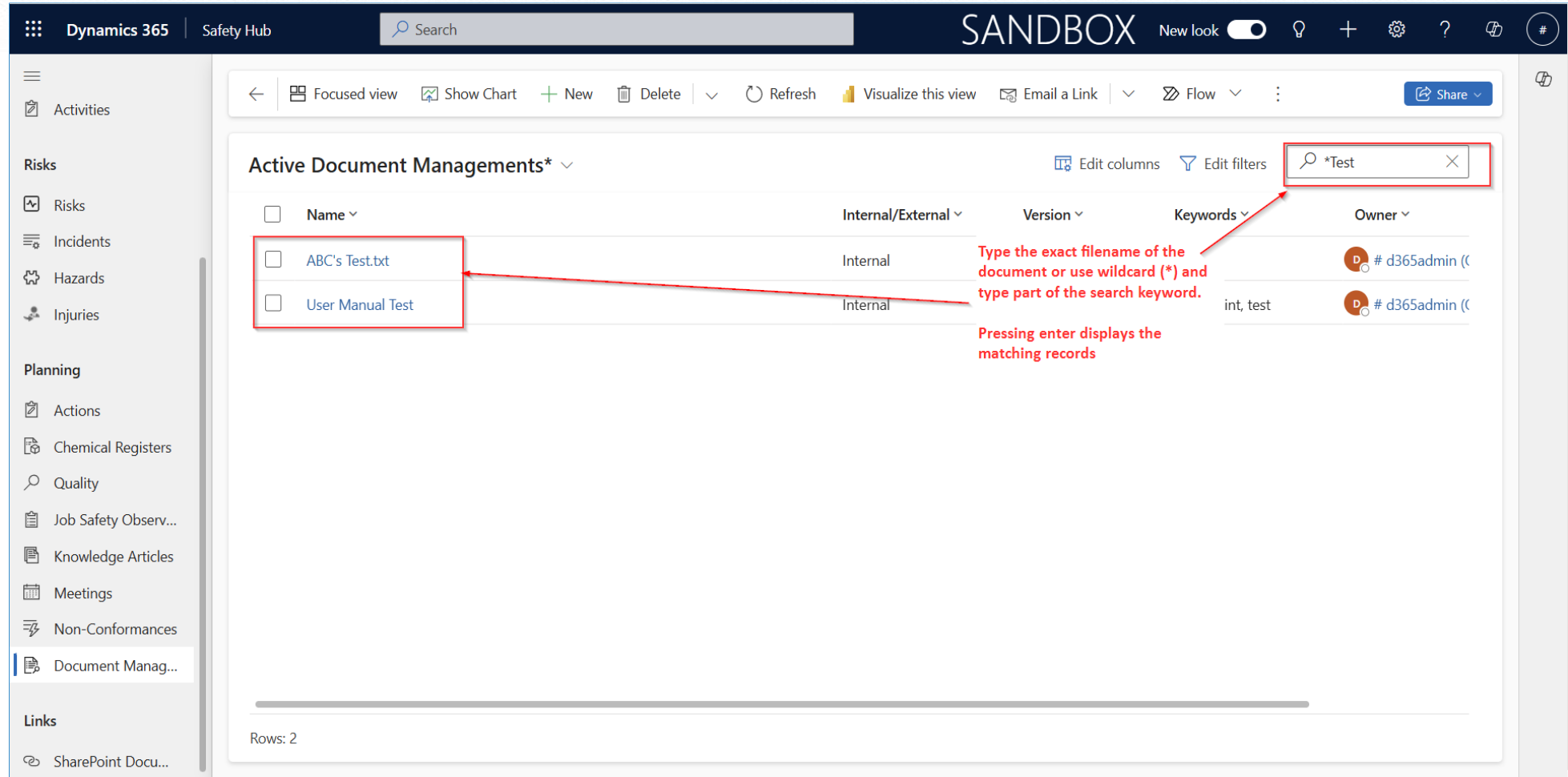
Name	Version	Revision Re...	Requested By	Changes Made On	Changes Made...	Notes
Health & Safety Learning Bulletin_001_Equi...	3.0	Version Up...		Changes Made On AM	d365admin	
Health & Safety Learning Bulletin_001_Equi...	2.0	Version Up...		9/09/2024 8:55 AM	d365admin	
Health & Safety Learning Bulletin_001_Equi...	1.0	Version Up...		9/09/2024 8:51 AM	d365admin	

8. Summary tab shows additional details. Optionally add keywords to make documents easier to search.



The screenshot displays the Dynamics 365 interface for document management. The top navigation bar includes 'Dynamics 365 | Safety Hub', a search bar, and the 'SANDBOX' environment. The document title is 'Health & Safety Learning Bulletin_001_Equipment Interactions HPI.docx -', created on 9/09/2024 at 8:52 AM, with an active status and owner #d365admin. The 'Summary' tab is selected and highlighted with a red box. The 'Keywords' field is also highlighted with a red box and a red circle containing the number '1', showing the value 'Bulletin Learning'. Other fields include 'Internal/External' (Internal), 'Subject' (---), 'Date Published' (8/09/2024), and 'Date Due for Review/Expiry' (---). The 'Managers' section shows 'Document Author' as d365admin and 'Document Reviewer' as ---.

9. Use wildcards when searching. Safety Hub displays records with filenames and Keywords that match the search criteria.



The screenshot shows the Dynamics 365 Safety Hub interface. The left sidebar contains navigation options: Activities, Risks (Risks, Incidents, Hazards, Injuries), Planning (Actions, Chemical Registers, Quality, Job Safety Observations, Knowledge Articles, Meetings, Non-Conformances), and Links (SharePoint Documents). The main area displays 'Active Document Managements*' with a search bar containing '*Test'. Below the search bar is a table with columns: Name, Internal/External, Version, Keywords, and Owner. Two records are shown: 'ABC's Test.txt' and 'User Manual Test', both marked as 'Internal'. A red box highlights the search bar and the two records. Red arrows point from the search bar to the records. Red text annotations explain the search process: 'Type the exact filename of the document or use wildcard (*) and type part of the search keyword.' and 'Pressing enter displays the matching records'.

Name	Internal/External	Version	Keywords	Owner
ABC's Test.txt	Internal			# d365admin ((
User Manual Test	Internal		int, test	# d365admin ((

Questions and answers

- ▶ What are your questions?
- ▶ What are your concerns?
- ▶ What was not mentioned during this presentation?

For further information, contact:



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