

# Workforce Safety v3.1 PDF

A new version of Appian is available! Update now to take advantage of the [latest features in Appian 22.3](#).

This version of Workforce Safety is not supported and this content is no longer being maintained. See [What's New with Workforce Safety?](#) for information on the latest release.



This content applies solely to Workforce Safety, which must be purchased separately from the Appian base platform. This content was written for Appian 20.2 and may not reflect the interfaces or functionality of other Appian versions.

## Workforce Safety Overview

### Introduction

During times of challenge and change, your organization's ability to respond to dynamic situations is more important than ever. Appian's Workforce Safety solution helps your organization get back to a new normal in the wake of crises, such as the COVID-19 pandemic.

Workforce Safety

Appian

### Help us get everyone back to work safely

This check-in will help determine whether it's safe for you to return to the workplace at this time

**CHECK IN**

In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [View your Incidents](#).

### Protecting your employees and community during a crisis

Large organizations are using the Workforce Safety solution to respond to the COVID-19 pandemic by giving employees a platform to confidentially report any COVID-related issues. Using this information, they can take proactive measures to stop the spread of the virus.

It also helps strengthen workforce communities in a time of need with employee peer-to-peer support. Easily match employee volunteers with coworkers in need of assistance—delivering groceries, offering a ride, or helping with children at home.

# I need help getting medication

## Request Details



**Susan Williams**  
susam.williams@app.com  
703-442-8844

I need help getting medication

Low

In-Person

Running errands

I need Ibuprofen and my local store is out.

## Volunteer Details



**Carl Peters**  
carl.peters@app.com  
(555)234-5677

Arlington, VA 22203, USA

Remote

Open Help Requests: 0

Closed Help Requests: 1

Additional Details: I am available any day of the week

## Assign Volunteer

Search Location...

Running errands, Touch base or so ...

In-Person

	Volunteer	Address	Help Categories	Help Offered	Number of Requests
	Timothy Kim	Washington, DC, USA	<ul style="list-style-type: none"><li>Child Care</li><li>Running errands</li></ul>	In-Person, Virtual	1
	Patricia Johnson	McLean, VA 22102, USA	<ul style="list-style-type: none"><li>Running errands</li></ul>	In-Person	3
	Carl Peters	Arlington, VA 22203, USA	<ul style="list-style-type: none"><li>Child Care</li><li>Running errands</li></ul>	In-Person, Virtual	1
	Sharon White	Arlington, VA 22205, USA	<ul style="list-style-type: none"><li>Running errands</li></ul>	In-Person, Virtual	1

## Helping your workforce return to a new normal

As a crisis situation starts to return to a new normal, human resource and crisis management teams must plan to return the workforce safely to the workplace. These transitions are complex.

In the wake of the COVID-19 pandemic, to ensure people are productive and safe in the workplace, organizations will need to consider concerns such as:

- Individual employee health and risk screenings.
- Whether an employee's role can be done remotely.
- Corporate policies.
- A variety of national and regional government regulations.

The Workforce Safety solution helps ease your employees back into your offices and facilities, safely and with minimal disruption. Through a safe, phased approach you can determine which locations can get back to work first, while following local government regulations and reducing risk.

## What does the Workforce Safety solution provide?

The Workforce Safety solution offers a wide-range of capabilities to give organizations the ability to respond to crisis situations and manage the return-to-work process.

### A unified command center

The solution establishes a central command center to safeguard the health and safety of employees. Employers can see and manage the health and work status of all employees in real time.

[DASHBOARD](#)
[INCIDENTS](#)
[HELP REQUESTS](#)
[VOLUNTEERS](#)
[CONFIGURE](#)
Response Hub  **Appian**

[PEOPLE](#)
[ORGANIZATION](#)
[LOCATIONS](#)
[INCIDENTS](#)
[HELP REQUESTS](#)

+ CHECK-IN ON BEHALF OF USER

**Name** 
**From Date** 
**To Date** 
**Department**

**Return Location** 
**State or Province** 
**Country**

**Eligibility Status** (explanation) 
**Work Capacity**

**Question-Response Pairing**

Name	Work Capacity	Eligibility Status	Department	Location	Submission Date
Stephen Singh	In Office	Report to the Workplace	Information Technology	Denver, CO   Colorado, United States	Jul 3
Peter Harris	Remote	Workplace Eligible	HR (Human Resources)	McLean, NC   Virginia, United States	Jul 3
Chris Watkins	In Office	Workplace Eligible	HR (Human Resources)	McLean, NC   Virginia, United States	Jul 3
Daniel Nelson	Remote	Workplace Eligible	Finance	McLean, NC   Virginia, United States	Jul 3

## Fast, easy workforce screening

Employees use a simple web or mobile interface to submit and update personal health and risk data required by local law and corporate policy.

# Tell Us How You're Doing

Update Profile

## 1 Health and Community

Has your temperature been less than 99.9 F or 37.7 C without the use of fever-reducing medications, for the last 3 days?

YES
NO

Have you tested positive for COVID-19 by a medical professional?

YES
NO

Do you currently exhibit any respiratory symptoms of COVID-19 (e.g., cough, shortness of breath)?

YES
NO



## Intelligent return-to-workplace certification

Take advantage of pre-loaded rules that determine when it is safe for your employees to return to the workplace. These rules are influenced by the latest health organization guidelines and government regulations and will determine if an employee can return to work based on their responses to the employee readiness questionnaire. If you need more flexibility, you can even modify the rules based on your organization's policies.

## Thank you for checking in

**Continue working from home.**

You are advised to work from home based on your latest questionnaire responses.

[View Guidelines](#)

In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [Report an Incident.](#)



### Fast issue resolution

Exceptions, appeals, or employee concerns can be quickly managed by HR using built-in case management capabilities.

PEOPLE ORGANIZATION LOCATIONS **INCIDENTS** HELP REQUESTS

**54**

UNASSIGNED INCIDENTS

**74**

TOTAL INCIDENTS

**12**

INCIDENTS THIS MONTH

#### Incident Statistics

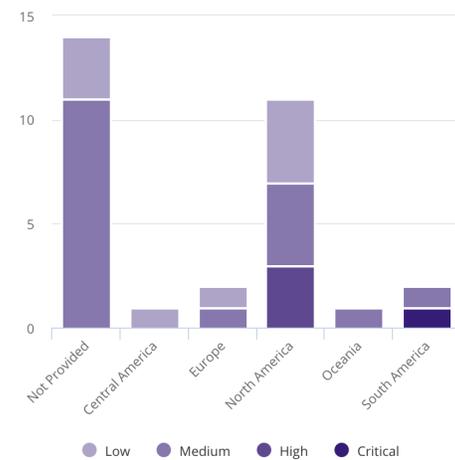
**54**  
Unassigned

**8**  
In Progress

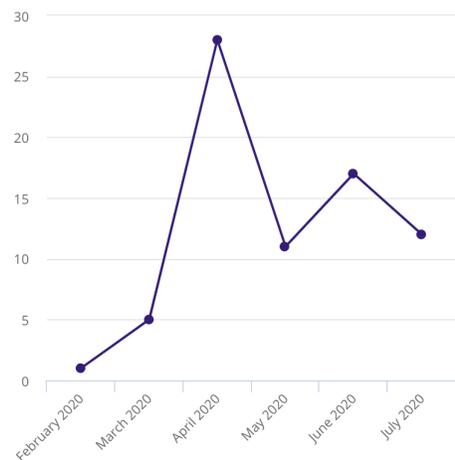
**10**  
Closed

**2**  
Cancelled

Incident Locations



Recent Incidents By Month



#### Incident Details

Title	Status	Created	Urgency	Type	Location	Assignee
65 - Check-In Incident - Robert Ward	Unassigned	Jul 6	-	Check-in response	-	-
64 - Check-In Incident - Carl Peters	Unassigned	Jul 6	-	Check-in response	-	-

### What do I do next?

To get your solution set up, see the [Setup Guide](#) for instructions on how to quickly get up and running with the Workforce Safety solution.

To understand more about the features of the solution and group security, see the [User Guide](#).

# Workforce Safety 3.1 Release Notes

## Introducing Surveys

Do you want to gather information on your employees before they return to the workplace or enter the daily check-ins and certification flow? Well now you can! Configure a survey to gather information from your employees. For instance, do you want to gauge who in your organization is intending to return to the workplace this fall? Ask this on the initial survey, and decide which responses prevent users from entering the daily check-in experience.

# Complete Survey



---

**1** About You

---

**2** Survey Questions

Are you ready to come back to work?

YES  NO

How do you primarily commute to work?

Car  
 Walk/Bike  
 Public Transportation  
 Carpool

[PREVIOUS](#) [CONTINUE](#)

## More Question Formats

Have you wanted to ask questions beyond just yes/no choices? Now you can! Configure questions that best meet your organization's needs for the given circumstances by using multiple choice and short answer question formats.

For example, maybe you want to survey your employees on what their primary method of commuting to the office is so you can assess the level of exposure your employees face on their commutes. Or maybe you are interested in sourcing an employee's temperature.

## 2 Health and Community

Has your temperature been less than 99.9 F or 37.7 C without the use of fever-reducing medications, for the last 3 days?

✓ YES

✗ NO

What is your current temperature?

How do you primarily commute to work?

- Walk
- Car
- Public Transportation
- Commute

PREVIOUS

CONTINUE

## Associate Questions to Role

Earlier, we introduced the ability to only show certain questions if a user is in a specific location. Now we are adding the capability to only show certain questions based on whether an employee is full-time remote or office-based.

**Visibility**

Only show this question to users in certain locations

--- Select a Country ---  --- Select a State/Provi...  --- Select a City ---

Country	State/Province	City	Remove
United States	Florida	-	✗
United States	Colorado	Denver, CO	✗

Only show this question to certain user positions

Full-time remote

## Streamlined Incident Notifications

We have streamlined the email notifications that are sent when an incident is updated. Now, only the reporter and assignee of an incident will be notified when incidents are updated or commented on. The entire response managers group will still be notified when an incident without an assignee is commented on by an employee. When an incident is created, no notification is sent, but recently created/updated incidents surface to the top of the incidents list for review and assignment by response managers.

## Consolidated Incidents

When question responses on check-ins or surveys are set to trigger incident creation, response managers will now see one active incident per employee per questionnaire. That way, if a user answers a few questions that would normally create an incident, your response managers can ensure a coordinated response for that employee.

This means that if an incident is created when a user fills out a check-in or survey, that incident will be updated with a comment each time a user fills out the check-in or survey again.

## New Check-In and Survey Incident Feature Toggles

There are two new feature toggles that can be used to control how check-in and survey incidents affect future check-ins. If an incident is created for a user based on a response to a survey, you can choose to prevent that user from checking in until the incident is closed. This proves useful if you would like to have manual intervention at any point in the process of allowing an employee to submit daily check-ins.

Likewise, if an incident is created for a user based on a response to a check-in, you can choose to prevent that user from receiving a mobile pass to return to the workplace. Your organization has the option of reviewing and closing an incident triggered by question responses of your choosing prior to an employee being able to certify with a pass.

## Manage Feature Options

Use this form to manage the features of the site according to your organization's requirements.

Active	Site Feature	Description
<input type="checkbox"/>	Community Volunteering and Help Requests	When toggled on, allows users to create community help requests or sign up as volunteers for community help.
<input type="checkbox"/>	User Incident Creation	When toggled on, allows users to create new incidents. If toggled off, Response Managers can still create new incidents and configure questions to automatically create incidents when a user enters a certain response.
<input type="checkbox"/>	Check-Ins Disabled by Active Survey Incidents	When toggled on, requires response managers to close incidents that are created from a survey before the affected user can check-in. If toggled off, incidents created from survey responses have no effect on check-ins.
<input type="checkbox"/>	Return Passes Disabled by Active Check-In Incident	When toggled on, requires response managers to close check-in incidents before the affected user can receive a return to workplace pass. If toggled off, check-in incidents have no effect on return to workplace passes.

## New Personas

### Configuration Managers

There is a new configuration managers persona that allows these users to configure the site without seeing other users' data.

### Response Managers

HR Managers have been rebranded to Response Managers to provide a broader definition of this super user. You can place the few users in your organization who should be case managers and have visibility into all content in this group.

## Usability Improvements

On the Workforce Safety site, the facility information, helpful links, and policies, as well as the incident creation link (if enabled), will always display. Previously, this information didn't display until after a user checked in.

## Solution Support

In addition to the Workforce Safety release notes and product documentation, Appian's Solutions Support team provides a number of services to ensure the success of your Workforce Safety solution. See the [Solution Support Guide](#) for more information.

See [Workforce Safety 3.0 Release Notes](#) for **What's New** features in the previous release.

# Setup Guide

## Introduction

After you have [installed](#) Workforce Safety, there are a few steps to take to quickly get up and running with it.

This page walks you through the remaining steps to set up Workforce Safety.

If you face any issues along the way, please contact our Workforce Safety solution support team.

Reach us by phone:

- Americas: +1 (703) 420-1311

- APAC: +61 285034152
- EMEA: +44 20 3929 3748

Reach us by email: support@appian.com

If you make any changes to Workforce Safety that are not outlined in the Workforce Safety documentation on this site, you may not be able to upgrade or hotfix the solution without losing the changes. This includes any changes to the database. Please contact our Workforce Safety support team with any questions about this.

## Step 1: Set up admin users

Users that you want to act as administrators should be added to the administrators group. This group receives emails when there are errors in the solution processes so that they can monitor and respond to these errors.

In order to manage users and groups that control access to Workforce Safety, these users should also be System Administrators. System Administrators are users that can manage users and have access to the [Admin Console](#) and [Appian Designer](#).

To restrict access to sensitive information, members of the administrators group do not have access to the content on the [Response Hub](#), even though they can see it. See the [Groups Reference Page](#) for more information about the access that members of each group have.

To set up admin users as System Administrators and add them to the administrators group:

1. In your Appian environment, log in as a system administrator.
2. In the top-right corner of the page, go to the navigation menu and select **Appian Designer**.
3. Make sure that the **User Type** for the admin user is **System Administrator**.
  - Go to the **Users** tab.
  - Find and open the user.

<input type="checkbox"/>	Name	Username
<input type="checkbox"/>	Charles Parker	charles.parker

- Verify that the **User Type** is **System Administrator**. If not, select **System Administrator** and click **Save**.

## User Properties

Charles Parker has no active tasks

**Profile**

Username charles.parker (Change)

\* First Name Charles

\* Last Name Parker

Nickname

Supervisor

Title  Select existing  Create new  None

**Security**

\* User Type  Basic User  System Administrator  
Changes will take effect when the user next logs in

**Contact**

\* Email charles.parker@app.com Mobile Phone

CANCEL SAVE

4. Add admin users to the administrators group.
  - o Go to the **Applications** tab and open the **Workforce Safety** application.
  - o Find and open the Workforce Safety Administrators group.

CampusPass OBJECTS MONITORING DEPLOYMENTS

Name or description

NEW ADD EXISTING

Clear Filters

OBJECT TYPE

- Connected System
- Constant
- Data Store
- Data Type
- Decision
- Document
- Expression Rule
- Feed
- Folder
- Group

<input type="checkbox"/>	Name
<input type="checkbox"/>	Workforce Safety Response Managers
<input type="checkbox"/>	Workforce Safety Administrators
<input type="checkbox"/>	Workforce Safety Command Center
<input type="checkbox"/>	Language Users
<input type="checkbox"/>	Language Administrators
<input type="checkbox"/>	Workforce Safety Users
<input type="checkbox"/>	Workforce Safety Facilities Managers

- o Click **ADD MEMBER**.
- o Use the **Users to Add** picker to select the user or users, and click **ADD**.

## Add Group Members

Choose the groups and users to add as members of the Workforce Safety and Readiness Administrators group

**Groups to Add**

Select one or more groups

**Users to Add**

Charles Parker x

CANCEL ADD

## Step 2: Update Admin Console settings

You will need to update several settings in the [Admin Console](#), including setting the user start pages and default language. We also recommend turning on the **Prompt Users to Download App** setting in order to provide a quick way for users to download the mobile app.

### Setting the user start page

A [user start page](#) is the default page that displays for users when they first log in to Appian. If your users will use Workforce Safety as their primary Appian site, we highly recommend setting the user start page for all of your users to either the **COVID-19 Workforce Safety** site or the **Response Hub** site.

To set the user start page:

1. In your Appian environment, log in as a system administrator.
2. In the top-right corner of the solution, go to the navigation menu and select **Admin Console**.
3. Under **SYSTEM**, select **User Start Pages**.
4. Set the user start page for **Response Hub** users.
  - o Click **New Start Page**.
  - o For **Start Page URL**, enter the URL for the Response Hub: `https://your-appian-instance.com/suite/sites/A8DpA4P9`. Replace `your-appian-instance.com` with your site URL.
  - o For **Groups**, use the picker to select the Workforce Safety Command Center.
5. Set the user start page for employees.
  - o Click **New Start Page**.
  - o For **Start Page URL**, enter the URL for the Workforce Safety site: `https://your-appian-instance.com/suite/sites/z1ck30E1`. Replace `your-appian-instance.com` with your site URL.
  - o For **Groups**, use the picker to select the Workforce Safety Users.
6. Click **SAVE CHANGES**.

The screenshot shows the Appian Administration Console interface. The left sidebar contains a navigation menu with categories like SYSTEM, AUTHENTICATION, and Maintenance Window. The main content area is titled "User Start Pages" and includes a "Default Start Page" field and a table for "Start Pages". The table has columns for "Start Page URL" and "Groups". Two rows are visible, each with a URL and a group name, and a "New Start Page" button at the bottom. A "SAVE CHANGES" button is located at the bottom right of the page.

If the `https://your-appian-instance.com/suite/tempo/news` site displays when a user logs in, they can go to the Workforce Safety site by clicking  > **COVID-19 Workforce Safety** or **Response Hub**.

### Setting the default language

If you want users set their default language to one of the multiple languages supported by Workforce Safety, you will need to set the language settings in the Admin Console. See [Internationalization](#) for more information on language settings.

If you only need to display the solution in English, you can skip this step.

To set the language settings:

1. In the **Admin Console**, under **SYSTEM**, select **Internationalization**.
2. For **Enabled Languages**, select one or more of the following supported languages.
  - o English (US) [en\_US]
  - o Dutch [nl]
  - o French (France) [fr\_FR]
  - o German [de]
  - o Italian [it]
  - o Spanish [es]
3. Click **SAVE CHANGES**.

## Turn on the Prompt Users to Download App setting

On mobile devices, Workforce Safety works best in the Appian mobile app, instead of a mobile browser. Some organizations may even decide to create their own [custom version of the Appian application](#) with their own branding.

Whatever your case is, to help drive mobile app adoption, and create a better mobile experience for users, we recommend turning on the **Prompt Users to Download App** setting in the Admin Console mobile settings. Enabling this setting will prompt users to download the mobile app when they access Workforce Safety from a mobile browser.

To turn on the Prompt Users to Download App setting:

1. In the **Admin Console**, under **SYSTEM**, select **Mobile**.
2. Select **Prompt Users to Download App**. The default links to download the Appian app for iOS and Android are entered automatically.
3. If you are using a custom mobile app that you would like your users to download, enter the link to these apps in the **iOS App Download Link** and the **Android App Download Link** fields.
4. Click **SAVE CHANGES**.

## Step 3: Add users and assign to groups

You likely have a lot of users to add to the Workforce Safety solution, so we give you several methods of adding your users: LDAP, SAML, CSV, or manual entry.

To get started adding users, in the top-right corner of the solution, go to the navigation menu and select **User Provisioning**. This site guides you through adding users using whichever way works best for your organization.

After you are done adding users, follow the instructions on the site to add users to groups to grant them access to the parts of the solution they will need.

**User Provisioning** Appian

# Workforce Safety Solution User Setup

**Need Help?**  
Reach us by phone:  
Americas: +1 (703) 420-1311  
APAC: +61 285034152  
EMEA: +44 20 3929 3748  
Reach us by email:  
support@appian.com

## How would you like to add users?

LDAP SAML Upload CSV Add Manually

## How to get your users going

### 1. Set Groups

## Step 4: Configure the site for your organization

After you've added members to the response managers group, they can log in and customize with information relevant to your organization.

Follow the instructions on the [Configure the Site](#) page to configure Workforce Safety.

**DASHBOARD** INCIDENTS HELP REQUESTS VOLUNTEERS **CONFIGURE** Response Hub Appian

Tailor Workforce Safety to your organization's needs.

MANAGE SITE FEATURES	FACILITIES
BRANDING	AREAS
INCIDENT OPTIONS	DEPARTMENTS
VOLUNTEER OPTIONS	DELETE USER DATA
CHECK-IN QUESTIONS	SURVEY QUESTIONS
HELPFUL LINKS	PREVIEW QUESTIONNAIRE
POLICY DOCUMENTS	GUIDELINES



## Step 5: Launch solution

Once all of the above steps are complete, you can notify your users to start using Workforce Safety. Reach out to Appian Support at any time if you have any questions.

# Installation Guide

## Introduction

Workforce Safety helps organizations manage crises, such as the COVID-19 pandemic. This page provides instructions for installing Workforce Safety in an Appian environment.

To update from version 3.0 to version 3.1 of Workforce Safety, see the [version 3.1 upgrade guide](#).

This solution may involve collection and dissemination of Personal Health Information. Please follow your organization's guidelines for handling of Personal Health Information under HIPAA. Appian recommends installing this app on Appian's HIPAA Cloud sites.

## Technical support

Please call our dedicated Workforce Safety solution help line at the numbers below if at any point you need assistance or have questions:

- US: +1 (703) 420-1311
- AUS: +61 285034152
- UK: +44 20 3929 3748

Current customers can also log into Appian Community and open support cases. All users of Workforce Safety can also email Appian Support at [support@appian.com](mailto:support@appian.com).

## System requirements

- Appian running version 20.1 or higher. Appian HIPAA Cloud is recommended to ensure potential sensitive employee health data is protected.
- A supported version of [MySQL database](#) as a business data source.
  - **Note:** Instructions below are tailored to MySQL. For use of other databases, these instructions will need to be modified.
- A supported [web browser](#).

If you have an environment that already includes Appian's Workforce Safety solution, you will need to install CampusPass in a separate environment.

## Step 1: Download software package

To download the software package (as an existing Customer or Partner):

1. Log-in to [forum.appian.com](http://forum.appian.com) and navigate to the [downloads tab](#).
2. Click on solutions and search for Workforce Safety and download the download package.

This package contains the following files:

- Application Zips:
  - Workforce Safety.zip
- Properties File:
  - Workforce Safety.properties
- SQL Files
  - Workforce-Safety\_Master-SQL-Script.sql

## Step 2: Deploy Plugins

Workforce Safety relies on the following plugins to be deployed and configured in the target system before the application files can be imported:

- [Google Maps](#) (v1.0.4) [com.appian.ps.googlemaps.cp]
- [Google Maps Connected System](#) (v1.0.1) [com.appian.ps.googlemaps.csp]
- [Personalization Utilities](#) (v3.6.5)
- [Regular Expression Functions](#) (v2.1.0)
- [Load Resource Bundle](#) (v1.2.0)

- [Barcode Utilities\(v1.0.0\)](#)

## Appian Cloud Environments

To deploy the plug-in for an Appian Cloud environment:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Admin Console**.
3. On the left side of the console, click **Plug-ins**.
4. Click **DEPLOY NEW PLUG-INS**.
5. Search for and click on Google Maps.
6. Click **DEPLOY**.
7. Repeat steps 4-6 for the remaining plugins listed above.

## Self-Managed Environments

To deploy the plug-in for a self-managed environment, follow the [Deploying Plug-ins](#) instructions. The plug-in files can be retrieved from the AppMarket links above.

## Step 3: Create database objects

In order to create the structure for the database tables, views, and other objects that are a part of Workforce Safety, you will need to run DDL scripts in your database.

1. In your MySQL business database, select the "Appian" or desired target database.
2. Import the `Workforce-Safety_Master-SQL-Script.sql`, which was downloaded in [Step 1](#).

## Step 4: Update the import customization file

Before importing the application files, you will need to update `Workforce Safety.properties` [import customization file](#) that was downloaded in [Step 1](#).

This file sets API value for the ITA Google Maps connected system.

To update the import customization file:

1. Open the `Workforce Safety.properties` file in a text editor.
2. For each line that begins with one hash (#), delete the hash.
  - For example, the line `#content._a-0000e428-dd70-8000-d620-01ef9001ef90_43843.VALUE=A` becomes `content._a-0000e428-dd70-8000-d620-01ef9001ef90_43843.VALUE=A`.
3. Update the `ITA_GOOOGLE_MAPS_API_KEY` and the `ITA Google Maps` values with your API keys.
  - **Note:** If you need to provision your own API key, see [Google API Key Setup](#).

```
1 ## Constant: ITA_GOOOGLE_MAPS_API_KEY
2 ## Type: Text
3 ##
4 ## Text values will be displayed in Appian exactly as they are
5 ## specified here. No spaces are trimmed. Values do not need to be
6 ## encased in quotation marks.
7 content._a-0000e428-dd70-8000-d620-01ef9001ef90_43843.VALUE=<your API key>
8
9 ## Connected System: ITA Google Maps
10 connectedSystem._a-0000e428-dd70-8000-d620-01ef9001ef90_43815.apiKey=<your API key>
```

4. Save the file.

## Step 5: Import the application files

Import the application files into the target environment.

1. In the target environment, log in as the deployment user.
2. Navigate to the Appian Designer.
3. Click **IMPORT**.
4. Click **UPLOAD** and choose the `Workforce Safety.zip` file that was downloaded in [Step 1](#).
5. Select **Include related import customization file** and click **UPLOAD**. Select the `Workforce Safety.properties` file.
6. Click **INSPECT**.
7. Review the inspection results. If there are no issues, click **IMPORT PACKAGE**.
  - **NOTE:** The import may time out due to file size, but import will continue in the background.
  - **NOTE:** If the business database is not called Appian, a warning will occur when importing the data stores. To fix this, after the import is complete, open each data store object and update the Data Source dropdown list to point to the Appian business database. Then simply save and publish the Data store. The tables will be created for you.

**Note:** The Tempo link in the navigation menu is hidden by default. If you currently utilize Tempo, you'll need to navigate to both the **Response Hub** and **COVID-19 Workforce Safety** site objects and modify the option next to **Show Tempo Link in Navigation Menu**.

# Google API Key Setup

## Introduction

Workforce Safety uses Google maps for location information. A Google API key is required to use this.

This page describes how to set up your own Google API key or keys.

## Determining your IP addresses

When you set up your Google API key, you will need to enter the IP address(es) for your Appian site. The steps for finding your IP address are different depending on if you have an Appian Cloud or self-managed installation. See the appropriate section below to determine your IP address.

If you already know your site's IP address(es), skip to the next section.

### Appian Cloud Environments

Below are steps to help you identify your IP address for Google Maps setup if you have an Appian Cloud installation.

1. Determine the region where your site is hosted. If you don't know the region of your site, check the [cloud insights](#) page or engage Appian Technical Support.
2. Use [this document](#) to determine the outbound gateway IPs in your region.

### Self-Managed Environments

Below are steps to help you identify your IP address for Google Maps setup if you have a self-managed installation.

1. If the IP address is unknown, use a dummy IP address, such as 192.168.0.1.
2. Navigate to **Appian Designer** and open the Google Maps Connected System Object named Google Maps.
3. Click the **Test Connection** button.
4. The error message will display the IP address making the request.

# Create Connected System



## Google Maps

Google Maps Connected System Plugin manages the API key for the Google Maps Component Plugin and enables distance, time, and geocoding functions  
Version: 1

### Name \*

### Description

### Google Maps Configuration

#### API Key ? \*

It is highly recommended to domain restrict your API Key to this server's IP address.

This IP, site or mobile application is not authorized to use this API key. Request received from IP address 54.236.230.220, with empty referer  
Please make sure the API key is valid for Google Maps, billing is turned on for your project, the Google Maps, Routes, and Places APIs are enabled, and that your API key is not restricted to a different domain.  
You can find a list of your current API keys and their restrictions at <https://console.cloud.google.com/apis/credentials> and see the APIs enabled for your project at <https://console.cloud.google.com/apis/dashboard>

TEST CONNECTION

GO BACK

CANCEL

USE IN NEW INTEGRATION

CREATE

5. Go back to the Google Cloud Console and update your Server API Key with this IP Address, click the dummy IP address entered earlier and replace it:

Google Cloud Platform Compute Project

API Restrict and rename API key REGENERATE KEY DELETE

Name \*  
API key 18

### Key restrictions

Restrictions help prevent unauthorized use and quota theft. [Learn more](#)

### Application restrictions

An application restriction controls which websites, IP addresses, or applications can use your API key. You can set one application restriction per key.

- None
- HTTP referrers (web sites)
- IP addresses (web servers, cron jobs, etc.)
- Android apps
- iOS apps

### Accept requests from these server IP addresses

Specify one IPv4 or IPv6 or a subnet using CIDR notation (e.g. 192.168.0.0/22).  
Examples: 192.168.0.1, 172.16.0.0/12, 2001:db8::1 or 2001:db8::/64

Update dummy IP with site's IP Address

Edit item

Address \*  
54.236.230.220

CANCEL DONE

ADD AN ITEM

6. Clicking **Test Connection** again should display a green success message:

# Create Connected System



## Google Maps

Google Maps Connected System Plugin manages the API key for the Google Maps Component Plugin and enables distance, time, and geocoding functions  
Version: 1

### Name \*

### Description

### Google Maps Configuration

#### API Key ? \*

It is highly recommended to domain restrict your API Key to this server's IP address.

Connection successful

TEST CONNECTION

GO BACK

CANCEL

USE IN NEW INTEGRATION

CREATE

## Setting Up Google API Keys

We suggest using restricted API keys. If you are planning on restricting the API keys, you will need to create two separate API Keys because the application relies on both server side (connected system) and browser side (custom component plugin) requests.

To set up Google API Keys:

1. Log in to <https://console.cloud.google.com/> using a Google account.
2. Select an existing project, or create a new one by clicking on the project dropdown next to "Google Cloud Platform".

Name	ID
✓ appian ?	importagenttest

3. On the left navigation pane, go to **APIs & Services** > **Credentials**, and then select **Create Credentials** > **API Key**. If you are using restricted keys, create two API keys.
4. Once created, copy this into a separate location.
5. Open the key to edit the details, such as name and key restrictions.
  - To use one unrestricted API key, leave **Application Restrictions** as **None** and **API Restrictions** as **Don't restrict this key**.

← Restrict and rename API key ↻ REGENERATE KEY 🗑 DELETE

Name \*  
AppianCovid19

### Key restrictions

 This key is unrestricted. Restrictions help prevent unauthorized use and quota theft. [Learn more](#)

### Application restrictions

An application restriction controls which websites, IP addresses, or applications can use your API key. You can set one application restriction per key.

None  
 HTTP referrers (web sites)  
 IP addresses (web servers, cron jobs, etc.)  
 Android apps  
 iOS apps

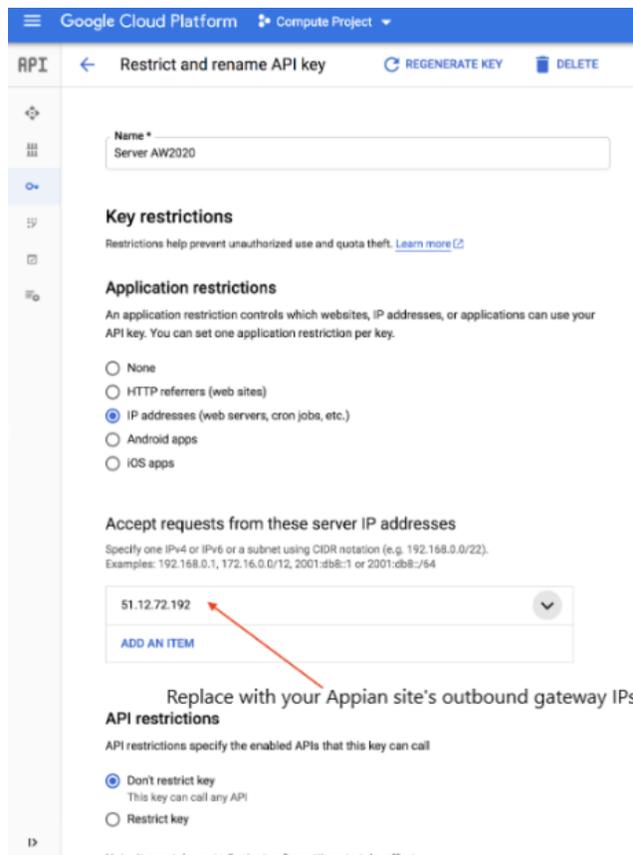
### API restrictions

API restrictions specify the enabled APIs that this key can call

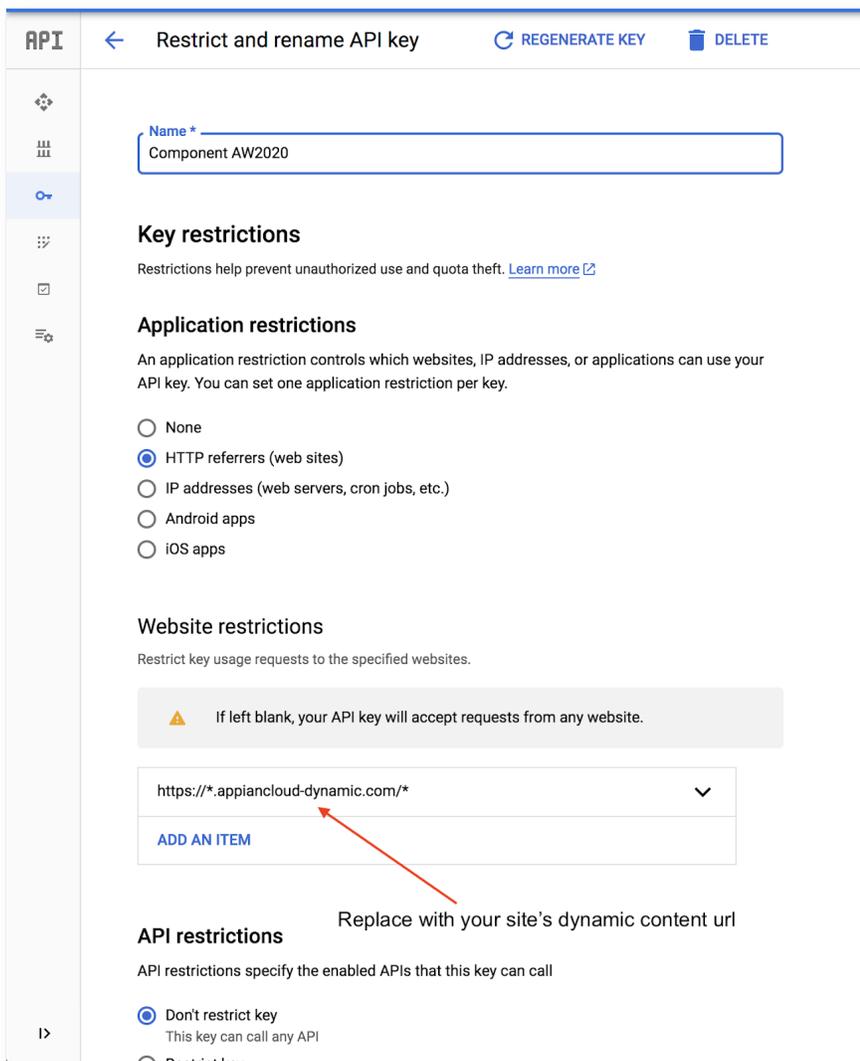
Don't restrict key  
This key can call any API  
 Restrict key

Note: It may take up to 5 minutes for settings to take effect

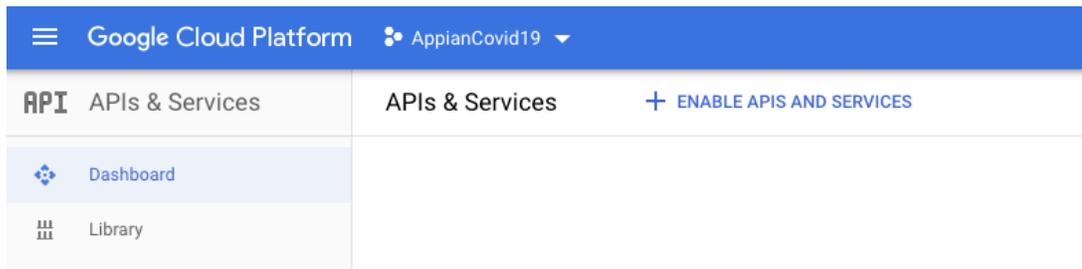
- To use two restricted API Keys (recommended), follow the below instructions:
  - **Connected System API Key - IP Address Server Restriction**
    - Select the Server Side requests key created earlier.
    - Select the **IP addresses** radio button, and enter your Appian site's IP Address(es). Scroll down and Save.
      - **Note:** To find your IP address, follow the instructions in the [Determining your IP addresses](#) section. For cloud installations, you'll need to add all of the IP addresses to the list.
    - The GCP Server Side (Connected System) API Key configuration should look like the image below. The item should be replaced with your site's outbound gateway IPs.



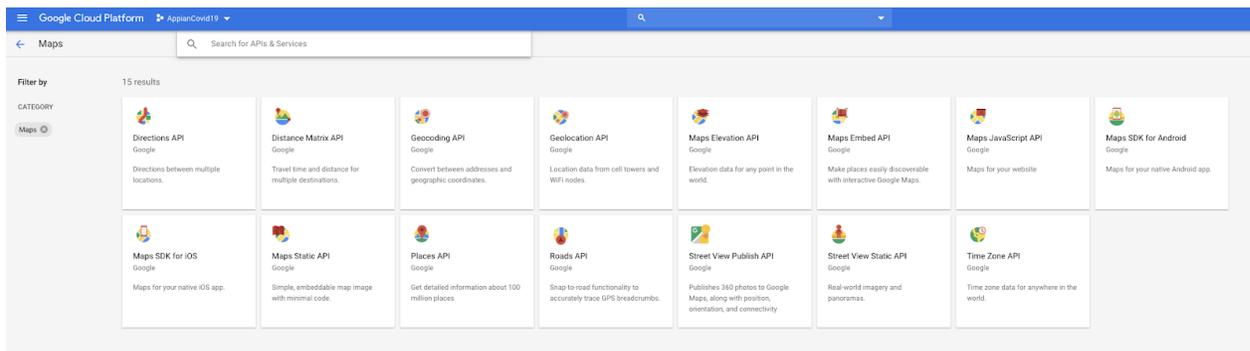
- **Custom Component Plugin API Key - HTTP Referrers Restriction:**
  - Select the client side request key created earlier.
  - Select the "HTTP referrers" radio button, and enter your [Appian site's dynamic content URL](#), scroll down and Save.
    - Typically for Appian Cloud sites, the dynamic url is <sub-domain>.appiancloud-static.com.
    - If your site is not hosted on the Appian Cloud or the url has been customized, enter the url that is in the custom.properties file in our server under the key conf.suite.DYNAMIC\_SERVER\_AND\_PORT.
    - The HTTP Referrers (Component Plugin) API Key Configuration should look like the image below. The item should be replaced with your site's dynamic url.



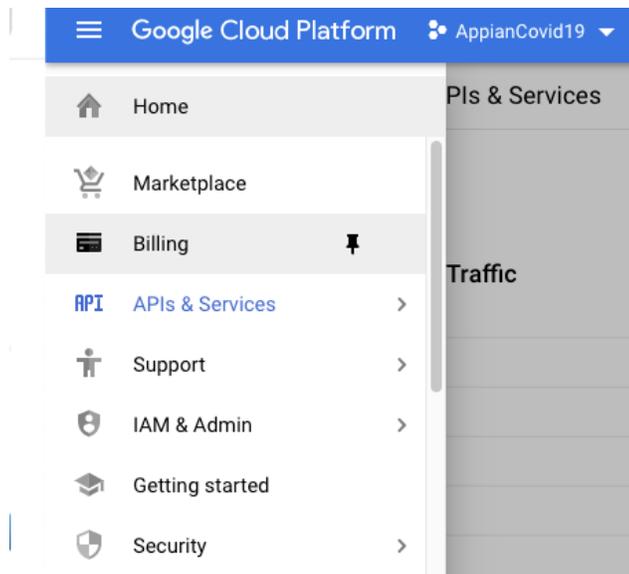
6. To enable all map-related APIs, go back to the main dashboard and under **APIs & Services**, click **Enable APIs and Services**.



7. On the left, filter by **Maps**. 15 results should appear. Drilldown and enable each one.



8. The last step is to enable billing. Navigate to the billing section, create a new billing account, and assign it to the project.



# User Guide

## Introduction

We created Workforce Safety to help large organizations with a unique problem—how can they keep their extensive number of employees safe and connected during the COVID-19 pandemic?

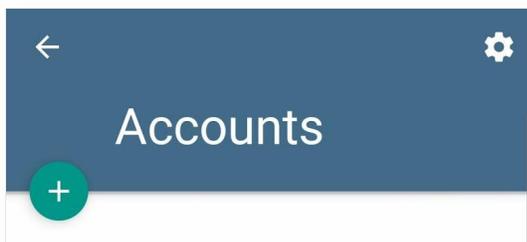
Reacting quickly to possible exposures while maintaining employee anonymity is of paramount importance. But also important is providing employees with access to the most up-to-date information as well as helping employees throughout the organization who may be struggling.

Use this guide to find out how your users can use Workforce Safety to help themselves and their organizational community during this time of challenge and change.

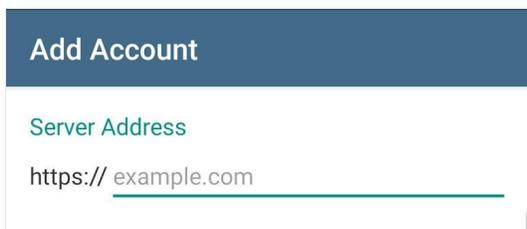
## Accessing Workforce Safety on a mobile device

Users can access Workforce Safety on their mobile devices by downloading the Appian application.

1. From the Apple App Store or Google Play store, download and open the **Appian** application.
2. Click the + icon to add a new account.



3. Enter site name in the **Server Address** field.



4. Log in using your credentials.

## User roles

The following chart outlines a brief summary of each user role within Workforce Safety. Further details on the features each of these groups has access to can be found throughout this user guide. For specific information on the actions and information that each group can perform, see the [groups reference page](#).

User Role	Role Description	Appian Group
<a href="#">Employees</a>	All users within your organization can be added to this group to have access to the COVID-19 Workforce Safety site, where they can check in with their current status and stay updated with the latest information regarding the crisis.	Workforce Safety Users
<a href="#">Response Managers</a>	Response managers use the Response Hub to respond to incidents and help requests from users. They can also see aggregate reporting of their people, locations, and incidents to provide real-time insight into the crisis. Additionally, they can tailor the application to suit the organization's needs.	Workforce Safety Response Managers
<a href="#">Coordinators</a>	Do you have someone in your organization leading the charge to help your community through this time? Add these high-energy orchestrators to the Coordinators group. Members of this group can see all incoming help requests and match them to volunteers. There is even aggregate reporting available to them to see how they can best distribute resources to those in need.	Workforce Safety Coordinators
<a href="#">Screeners</a>	To help ease the role of the response managers, members of this group are able to answer questionnaires on behalf of other users. Note that screeners have access to the last check-in data for a user, including their profile information and responses.	Workforce Safety Screeners
<a href="#">Facility Managers</a>	Some organizations have many locations to keep track of. Facility managers can help take on the responsibility of maintaining the facilities, departments, and areas for an organization.	Workforce Safety Facility Managers
<a href="#">Configuration Managers</a>	Configuration managers can see the Configure page in the Response Hub. This allows them to configure Workforce Safety without seeing user data.	Workforce Safety Configuration Managers

## Employees features

### Workforce Safety home page

Appian Workforce Safety contains a home page for users to perform regular check-ins, request and provide assistance, and obtain valuable resources regarding the crisis.

## Thank you for checking in

**✔ You're eligible to return to the workplace today!**

You are eligible to report to the workplace today. Be sure to bring your return to workplace pass as proof that you are certified to be on-site this calendar day.



In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [View your Incidents.](#)

[Helpful Links](#)

[Policy Documents](#)

[Facilities](#)

Version 3.1

### Survey

A survey is a set of questions that can be sent to users before they start doing daily check-ins. You can use this to gauge interest and ability to return to the workplace.

## Complete Survey



1 About You

2 Survey Questions

Are you ready to come back to work?

YES

NO

How do you primarily commute to work?

- Car
- Walk/Bike
- Public Transportation
- Carpool

PREVIOUS

CONTINUE

When the [survey is active](#), on the Workforce Safety home page users will see an option to complete the survey. If they complete the survey with no disqualifying answers, they be able to start performing check-ins to determine their ability to return to the workplace.

## Let us know how you're doing

Please complete the survey to determine your eligibility for daily check-in

COMPLETE SURVEY

In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [View your Incidents.](#)



If the **Check-Ins Disabled by Active Survey Incidents** feature toggle is turned on and an incident is created based on a user's response to a survey question, they will not be able to check in until a response manager closes the incident. If they update their survey, a comment will be added to the incident, but it will not automatically allow them to start checking in even if they respond with answers that are not disqualifying.

### Check-in

On the Workforce Safety home page is an action to **Check In**.

## Help us get everyone back to work safely

This check-in will help determine whether it's safe for you to return to the workplace at this time

CHECK IN

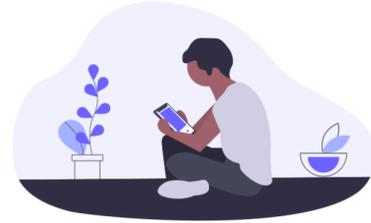
In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [View your Incidents.](#)



Users can check in to update their health and work status. As part of this check-in, they are also prompted to fill out a set of questions to determine their fitness to return to the workplace. All questions are required and the information will go to the response managers reporting dashboard.

# Tell Us How You're Doing

 Update Profile



1

## Health and Community

Has your temperature been less than 99.9 F or 37.7 C without the use of fever-reducing medications, for the last 3 days?

YES

NO

Have you tested positive for COVID-19 by a medical professional?

YES

NO

Do you currently exhibit any respiratory symptoms of COVID-19 (e.g., cough, shortness of breath)?

YES

NO

Users are restricted to checking in once a day. If the user needs to check-in again for the same day, response managers and screeners can check in again on their behalf.

## Report an incident

If the [User Incident Creation](#) feature toggle is active, users can report an incident if they have been impacted by COVID-19.

## Ready to check in

Complete the check-in survey to determine your workplace eligibility for today

CHECK IN

In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [Report an Incident.](#)



Clicking **Report an Incident** will take the user to the **Add New Incident** form.

# Add New Incident

Please note that any Personal Health Information contained in this incident ticket will be viewable by individuals that are responsible for reviewing and responding to incidents. Please follow your organization's HIPAA policies with respect to Personal Health Information being submitted.

### Incident Details

**Type \***  
COVID-19

**Title \***  
*e.g., Sick employee attended event*

**Incident Location**      **Incident Date**  
--- Select an Office/Location ---      06/19/2020

**Description ? \***

**Impact ?**

---

**Who is affected by this incident?**

**First Name \***      **Last Name \***

**Email Address**      **Phone Number ?**  
*e.g. 1234567890 or +12345678:*

+ Add an Impacted Person

---

### Attachments

No files have been added

+ Attach New File

---

**CANCEL**      **REPORT INCIDENT**

## View my incidents

On the landing page, users can click **View your Incidents** to view any incidents that they have created. They cannot see incidents that were created based on their responses to a survey or check-in. If the user has not submitted an incident, they will be taken to the **Submit Incident Form**.

**Workforce Safety**      

## Ready to check in

Complete the check-in survey to determine your workplace eligibility for today

**CHECK IN**

In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! **View your Incidents.**



View Incidents shows a list of all incidents created by the user that need response manager action.

[← Back](#)

## Your Incidents

[+ CREATE INCIDENT](#)

Title	Assignee	Status
I have a cough	-	<span style="color: green;">✔ Closed</span>
Came in with someone who tested positive for COVID-19	-	 Unassigned

Clicking into an Incident displays a summary of the incident details, contact details for the person who reported the incident, people who may be impacted, related files, and a comment audit history.

## Came in contact with someone that tested positive for COVID-19

[UPDATE INCIDENT](#)
[Summary](#)
[Activity History](#)
[Related Actions](#)

Unassigned

In Progress

Closed

## Incident Details

<b>Type</b> COVID-19	<b>Incident Date</b>  4/29/2020
<b>Priority</b> -	<b>Incident Assignee</b> Unassigned
<b>Status</b>  Unassigned	<b>Incident Details</b> My neighbor has tested positive for COVID 19.
<b>Days Since Incident Created</b> 0	<b>Incident Location</b>  North America
<b>Impact</b> I need to self quarantine for 2 weeks.	

## 1 Comment

 **System Admin**  
6 minutes ago  
Status changed to: Unassigned


[COMMENT](#)

## Contact Details

## Reporter Details

 **Sally Taylor**  
 kevin.lin@appian.com

## Impacted Person Details

## Request help

If the [Community Volunteering and Help Requests](#) feature toggle is active and a user needs assistance from a member of the workplace community, they can submit a help request which can be addressed by a volunteer.

# Employee Help Request Form

We pride ourselves in our generosity of spirit; we look out for each other. In this time of crisis, please let us know if you need anything at all that we can be of assistance with. Please complete this form to open a request for help.

## How can others get in touch?

Please provide at least one contact method

### Phone Number

e.g. 1234567890 or +1234567890

### Email

sanchez@appian.com

## Where do you need assistance?

### I need support: \*

In-Person  Virtual

## What kind of assistance do you need?

### Title \*

e.g. I need my groceries picked up

### Urgency

Low  Medium  High  Critical

### I need help with: \*

- Running errands
- Working together (at least 6 feet apart)
- Transportation
- Help before or during a meeting
- Touch base or sounding board
- Other (please add details in comments)
- Donate something
- Play video games
- Make a donation
- Teach / Tutor
- Laundry Detail
- Cut Grass
- Make dinner

### Details \*

## Volunteer

If the [Community Volunteering and Help Requests](#) feature toggle is active, for users wishing to volunteer, a simple form is provided for them to fill out. Based on their responses, they can be matched with incoming assistance requests to provide the help needed.

# Update Your Volunteer Information

We pride ourselves in our generosity of spirit; we look out for each other. In this time of crisis, there are many ways to be helpful to your colleagues. Please complete this form to add yourself to the list of available volunteers.

## Where can you help?

### I can provide support: \*

In-Person  Virtual

### I'm based \*

Washington, DC 20003, USA

LOOKUP

Address OR postal code, country and then "Lookup"

## How can others get in touch?

Please provide at least one contact method

### Email

mary.king@company.com

### Phone Number

123-456-7890

## How can you help?

### Select all that you are willing to help out with \*

- Running errands
- Working together (at least 6 feet apart)
- Transportation
- Help before or during a meeting
- Touch base or sounding board
- Other (please add details in comments)
- Donate something
- Play video games
- Make a donation
- Teach / Tutor
- Laundry Detail
- Cut Grass
- Make dinner

### Additional Details

I am free Friday-Sunday.

## Resources

Resources are available under the **Helpful Links**, **Policy Documents**, and **Facilities** links. These sections contain links to external resources, documents uploaded by your organization and information on your organization's facilities.

## View assigned requests

If the [Community Volunteering and Help Requests](#) feature toggle is active and users have signed up to be a volunteer, they can click **View Assigned Requests** to see a grid of help requests assigned to them. When they select a request from the grid, they are taken to the summary view. This view provides information on the status and details of the request, contact information of the requester, and the request location. Requesters may close and cancel requests and assigned volunteers can close requests and decline assignments.

## Help with driving my clothes to the cleaner.

UPDATE REQUEST CANCEL CLOSE

Summary Related Actions

Unassigned

In Progress

Closed

Requests may contain Personal Health Information. Please follow your organization's policies for handling Personal Health Information under HIPAA when reviewing requests.

### Requestor Details

 James Employee  
202-555-4321

Help with driving my clothes to the cleaner.

Medium

In-Person

Help with driving my clothes to the cleaner.

Springfield, MA, USA

### Volunteer Details

 James Baker  
Kebin.lin@appian.com

### 2 Comments

 James Employee  
Mar 19

Status changed to: Unassigned

 James Baker  
Mar 23

Request matched with volunteer

Write a comment...

COMMENT



## Mobile pass

After a user checks in, a status displays letting them know if they are eligible to return to the workplace or not.

In order to be eligible to return, the following criteria must be met:

- The facility they are reporting to must have a [status](#) of **Open**.
- None of their responses disqualify them from returning.
- If the [Return Passes Disabled by Active Check-In Incident](#) feature toggle is active, the user must not have any active incidents that were created based on their check-in responses.
- They are an office-based employee.

Users that are eligible will be granted a return to workplace mobile pass. They can display this pass in the app by clicking **SHOW PASS**, or from an email that is automatically sent to the user.

The screenshot shows the 'Workforce Safety' app interface. At the top left, it says 'Workforce Safety' with a globe icon. At the top right, there is a profile picture of a man and the 'Appian' logo. The main heading is 'Thank you for checking in'. Below this, a green checkmark icon is followed by the text 'You're eligible to return to the workplace!'. Underneath, it says 'You have met the requirements to report to the workplace based on your latest questionnaire responses.' To the right of this text is a white box with a QR code icon and the text 'SHOW PASS'. On the right side of the screen, there is an illustration of a person sitting on the floor with a laptop, looking at a large window at night. At the bottom, there is a link: 'In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [View your Incidents.](#)'

The pass contains a QR code that can be scanned at the facility to verify they are eligible to return. The color of the pass also changes based on the day of the week to make it easier for screeners to identify valid passes.

The screenshot shows a mobile pass for Joseph Clark, Employee. At the top left, there is a profile picture of a man and the text 'Joseph Clark Employee'. Below this, there is a red bar with the text 'FRI JUNE 19TH'. Underneath that is a dark blue bar with the text 'VALO PARK'. In the center is a large QR code. At the bottom, there is a button with a close icon and the text 'CLOSE'. At the very bottom, it says 'This pass will expire on Jun 19, 2020 11:59 PM (GMT)'.

The mobile pass is valid for one day. After the pass expires, the user will need to check in again to receive another pass.

## Coordinator features

Members of the coordinators group can see the **DASHBOARD**, **HELP REQUESTS**, **VOLUNTEERS**, and **CONFIGURE** pages on the Response Hub.

## Dashboard page

The coordinators can see various information about requests, including the ability to look at a specific request and match with a volunteer.

**20**  
TOTAL HELP REQUESTS

**18**  
OPEN HELP REQUESTS

**0**  
HELP REQUESTS THIS MONTH

### Help Request Statistics

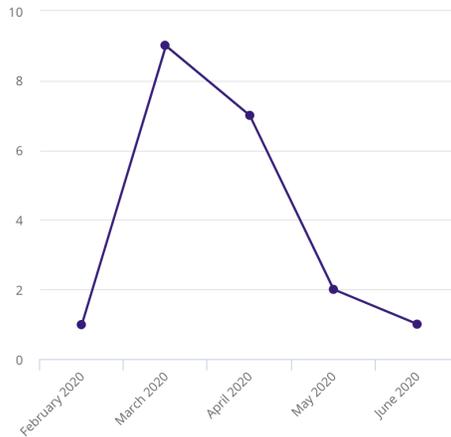
**5**  
Unassigned

**10**  
In Progress

**3**  
Closed

**2**  
Cancelled

Recent Help Requests By Month



### Top Volunteers

Volunteer	Requests
Robert Ward	5
Mary King	2
Charles Parker	2
Sally Taylor	2
Ben Johnson	1
Sharon White	1

6 items

### Help Request Details

Search record fields

Title	Status	Urgency	Location	Volunteer	Requested On
Help with driving my clothes to the cleaner.	In Progress	Medium	Springfield, MA, USA	Ben Johnson	Feb 29
Need to talk through resources for my kids	Closed	Medium	Virtual	Mary King	Mar 19

## Help Requests page

Coordinators are able to see all help requests, their status, and other vital aspects.

By going into a specific request, coordinators are able to see more detail as well as match that request with a volunteer.

## I need help getting medication

### Request Details

**Susan Williams**  
susam.williams@app.com  
703-442-8844

I need help getting medication

Low

In-Person

Running errands

I need Ibuprofen and my local store is out.

### Volunteer Details

**Carl Peters**  
carl.peters@app.com  
(555)234-5677

Arlington, VA 22203, USA

Remote

Open Help Requests: 0

Closed Help Requests: 1

Additional Details: I am available any day of the week

### Assign Volunteer

Search Location...

Running errands, Touch base or so

In-Person

Volunteer	Address	Help Categories	Help Offered	Number of Requests
Timothy Kim	Washington, DC, USA	Child Care, Running errands	In-Person, Virtual	1
Patricia Johnson	McLean, VA 22102, USA	Running errands	In-Person	3
Carl Peters	Arlington, VA 22203, USA	Child Care, Running errands	In-Person, Virtual	1
Sharon White	Arlington, VA 22205, USA	Running errands	In-Person, Virtual	1

Coordinators are also able to request help via the request help button.

# Employee Help Request Form

We pride ourselves in our generosity of spirit; we look out for each other. In this time of crisis, please let us know if you need anything at all that we can be of assistance with. Please complete this form to open a request for help.

## How can others get in touch?

Please provide at least one contact method

### Phone Number

e.g. 1234567890 or +1234567890

### Email

sanchez@appian.com

## Where do you need assistance?

### I need support: \*

In-Person  Virtual

## What kind of assistance do you need?

### Title \*

e.g. I need my groceries picked up

### Urgency

Low  Medium  High  Critical

### I need help with: \*

- Running errands
- Working together (at least 6 feet apart)
- Transportation
- Help before or during a meeting
- Touch base or sounding board
- Other (please add details in comments)
- Donate something
- Play video games
- Make a donation
- Teach / Tutor
- Laundry Detail
- Cut Grass
- Make dinner

### Details \*

## Volunteers page

The **Volunteers** tab is only visible to either coordinators or response managers. It shows a list of all registered and active volunteers within the organization for matching to help requests.

Volunteer	Location	Help Offered	Contact Info	Help Categories
James Baker	Maryland, USA	 In-Person	 Kebin.lin@appian.com	<ul style="list-style-type: none"><li>• Running errands</li></ul>
Sharon White	Reston, VA, USA	 In-Person	-	<ul style="list-style-type: none"><li>• Help before or during a meeting</li><li>• Other (please add details in comments)</li><li>• Running errands ... <a href="#">More</a></li></ul>
Charles Parker	Washington, DC 20003, USA	 In-Person,  Virtual	 jordan.mccollough@appian.com	<ul style="list-style-type: none"><li>• Donate something</li><li>• Help before or during a meeting</li><li>• Other (please add details in comments) ... <a href="#">More</a></li></ul>
Mary King	Washington, DC 20003, USA	 In-Person,  Virtual	 mccollough@appian.com	<ul style="list-style-type: none"><li>• Donate something</li><li>• Help before or during a meeting</li><li>• Laundry Detail ... <a href="#">More</a></li></ul>
Sally Bell	-	 Virtual	 sally.bell@example.com	<ul style="list-style-type: none"><li>• Make dinner</li><li>• Other (please add details in comments)</li><li>• Play video games ... <a href="#">More</a></li></ul>
Herman Manager	-	 Virtual	 kevin.lin@appian.com	<ul style="list-style-type: none"><li>• Teach / Tutor</li></ul>
Gary Jones	-	 Virtual	 example@example.com	<ul style="list-style-type: none"><li>• Cut Grass</li><li>• Laundry Detail</li><li>• Make a donation ... <a href="#">More</a></li></ul>
Robert Ward	Arlington, VA 22203, USA	 In-Person,  Virtual	 kevin.lin@appian.com  1237485738	<ul style="list-style-type: none"><li>• Help before or during a meeting</li><li>• Other (please add details in comments)</li><li>• Running errands ... <a href="#">More</a></li></ul>

8 items

These users are also able to use the grid to look at a specific profile by clicking on the name. Once inside, they are able to view volunteer information, update that information, or delete the profile.

**Sally Bell** UPDATE VOLUNTEER INFO DELETE PROFILE

**Summary** Related Actions

---

**Contact Information**

 Sally Bell  
 ✉ sally.bell@example.com

---

**Capability**

**Help Format**  Virtual

**Ways I Can Help**

- Running errands
- Other (please add details in comments)
- Play video games
- Make dinner

---

**0 Comments**

 Write a comment...

COMMENT

## Configure page

Coordinators are able to [manage site features](#) and [configure the volunteer options](#) that are able to be used.

**DASHBOARD** **HELP REQUESTS** **VOLUNTEERS** **CONFIGURE** Response Hub  **Appian**

Tailor Workforce Safety to your organization's needs.

MANAGE SITE FEATURES

VOLUNTEER OPTIONS



The only site feature they are able to toggle on or off is the **Community Volunteering and Help Requests** feature.

## Screener features

### Check in on behalf of users

When screeners log in, the Dashboard page of the Response Hub displays. From here, screeners can check in on behalf of users. This can be used to check in people on site as well as to retake check-in for users, since users only have the option to check in once per day.

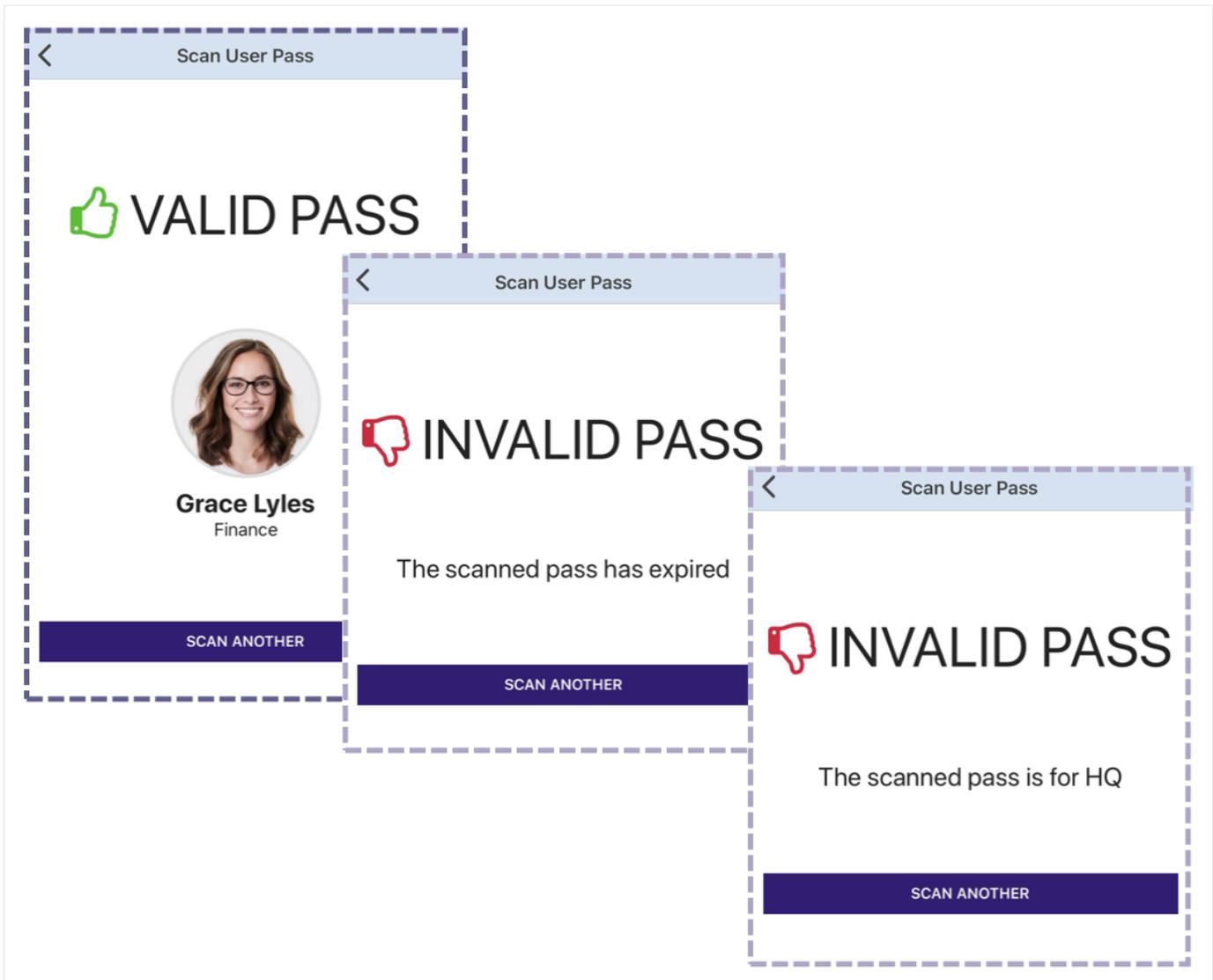
**Dashboard** Response Hub  **Appian**

+ CHECK-IN ON BEHALF OF USER

## Scanning passes

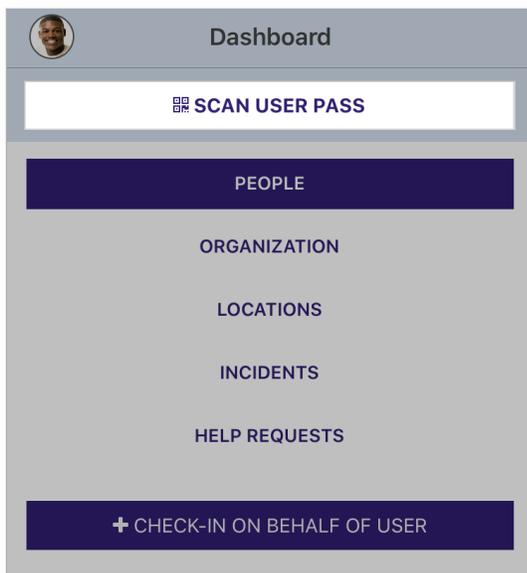
Screeners and response managers can scan mobile passes using the Appian mobile application.

If the user is eligible to return for that calendar day for the selected location, **VALID PASS** displays. Otherwise, **INVALID PASS** displays. If the pass is invalid either because it has expired or it is for a different location, the reason displays.

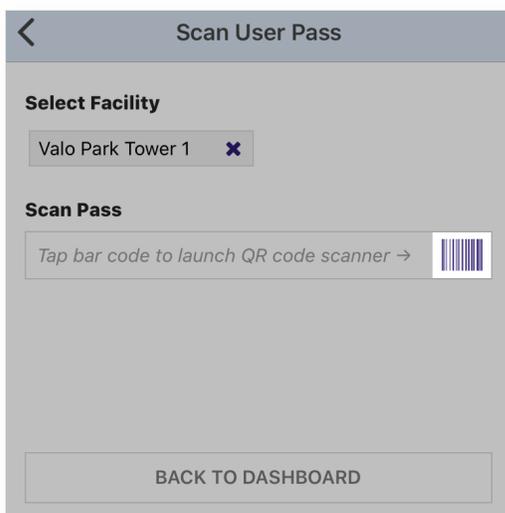


To scan a pass:

1. Log in to the [mobile Appian application](#).
  - **Note:** The Scan User Pass option will not display if Workforce Safety is opened in a mobile browser. It only displays from the Appian mobile application.
2. Click **SCAN USER PASS**.



3. For **Select Facility**, use the picker to find the facility that you are scanning passes for.
4. Tap the bar code icon to launch the QR code scanner.
  - **Note:** You may need to grant access to the mobile device's camera.



5. Scan the pass using the mobile device's camera. Either **VALID PASS** or **INVALID PASS** displays.
6. Click **SCAN ANOTHER** to go back to the Scan User Pass screen. The facility defaults to the last facility selected.

When a valid pass is scanned, the timestamp is saved to record that the user visited the facility that day.

## Response manager features

Response managers can see the **DASHBOARD**, **INCIDENTS**, **HELP REQUESTS**, **VOLUNTEERS**, and **CONFIGURE** pages on the Response Hub. They have the same access to all of the actions as a coordinator, with extended response management capabilities described below.

### Dashboard page

Response managers can view reports from the **DASHBOARD** page, which provides organizational level reporting into people, locations, incidents, and help requests.

+ CHECK-IN ON BEHALF OF USER

**Name** 
**From Date** 
**To Date** 
**Department**

**Return Location** 
**State or Province** 
**Country**

**Eligibility Status** 
**Work Capacity**

**Question-Response Pairing**

Name	Work Capacity	Eligibility Status	Department	Location	↓ Submission Date
Stephen Singh	In Office	Report to the Workplace	Information Technology	Denver, CO   Colorado, United States	Jul 3
Peter Harris	Remote	Workplace Eligible	HR (Human Resources)	McLean, NC   Virginia, United States	Jul 3
Chris Watkins	In Office	Workplace Eligible	HR (Human Resources)	McLean, NC   Virginia, United States	Jul 3

**People report**

On the **PEOPLE** report, response managers and screeners can check-in on behalf of a user. This allows screeners to submit a check-in for users at the location where they are checking in. Also, if a user needs to update their check-in on the same day that they submitted it, response managers or screeners will be able to assist them.

# Check-In on Behalf of User



1 User

## 2 About You

**General Information**

**Department \***

**Position \***  
 Full-time remote  Office based

**Mailing Address ?**

Address OR postal code, country and then "Lookup"

**Work Status**

**Current Work Status \***

**Does this user have the means to work from home? \***  
 Yes  No

**Has this user worked out of an office in the last 14 days? \***  
 Yes  No

In order to help response managers understand how the statuses are determined after a user checks in, next to the **Eligibility Status** filter there is an **explanation** link. Clicking this link displays a graphic of the logic that is used to determine the status that displays after a user checks in.

+ CHECK-IN ON BEHALF OF USER

<b>Name</b>	<b>From Date</b>	<b>To Date</b>	<b>Department</b>
<input type="text" value="Search Here"/>	<input type="text" value="06/26/2020"/>	<input type="text" value="07/10/2020"/>	<input type="text" value="Any"/>
<b>Return Location</b>	<b>State or Province</b>		<b>Country</b>
<input type="text" value="Any"/>	<input type="text" value="Any"/>		<input type="text" value="Any"/>

<b>Eligibility Status</b> (explanation)	<b>Work Capacity</b>
<input type="text" value="Any"/>	<input type="text" value="Any"/>

**Question-Response Pairing** ?

Name	Work Capacity	Eligibility Status	Department	Location	↓ Submission Date
Stephen Singh	In Office	Report to the Workplace	Information Technology	Denver, CO   Colorado, United States	Jul 3
Peter Harris	Remote	Workplace Eligible	HR (Human Resources)	McLean, NC   Virginia, United States	Jul 3
Chris Watkins	In Office	Workplace Eligible	HR (Human Resources)	McLean, NC   Virginia, United States	Jul 3

Additionally, clicking on a user in the **Name** column opens a user profile. This profile contains a **SUMMARY** view that contains a record of their submitted and assigned help requests, as well as their incidents.

Sally Taylor

REPORT TO THE WORKPLACE

RETURN LOCATION
DEPARTMENT

Europe HQ
 Finance

SUMMARY

CHECK-INS
SURVEYS

**Contact Information**

Sally Taylor

✉ kevin.lin@appian.com

**General Information**

Mailing address	Bismarck, ND, USA
Position	Office-based
Current Status	Remote
Last Pass Scan	Valo Park Tower 1 - Jun 26, 2020 6:54 PM

**Volunteer Capabilities - both In-Person and Virtual**

- Running errands
- Help before or during a meeting
- Touch base or sounding board
- Donate something
- Play video games
- Teach / Tutor
- Laundry Detail
- Cut Lawn

Submitted Help Requests

Request <span style="font-size: 0.8em;">?</span>	Status	Urgency:
Need a grocery run	In Progress	↓ Low
Looking for a virtual hangout with co-workers	In Progress	↓ Low
I need some groceries	In Progress	↓ Low

<< < 1 - 3 of 7 > >>

Assigned Help Requests

Request <span style="font-size: 0.8em;">?</span>	Requested By	Status	Urgency:
Someone to play online board games with	Ben Johnson	In Progress	↑ High
I need someone to talk to online	Ben Johnson	Closed	→ Medium

There is also a **CHECK-INS** view and a **SURVEYS** view that have records of their check-in and survey responses.

SUMMARY

CHECK-INS

SURVEYS

Tuesday, Jul 14, 2020 4:35 AM

### Check-In

Friday, Jun 26

- Have you tested positive for COVID-19 by a medical professional? **No**
- Do you currently exhibit any respiratory symptoms of COVID-19 (e.g., cough, shortness of breath)? **No**
- Are you or any of the person(s) in your household experiencing symptoms (i.e., fever, cough, or shortness of breath) of, or tested positive for, COVID-19? **No**
- Are you currently caring for anyone who is sick with possible COVID-19 symptoms? **No**
- Have you been in close contact with others from outside your household within the last 14 days? **No**
- Have you recently returned from traveling abroad within the last 14 days? **No**
- Do you feel sick? **No**

### Organization report

The **ORGANIZATION** report outlines an aggregate health summary of the organization's facilities and employees. Employee data comes from employee check-in responses.

PEOPLE

ORGANIZATION

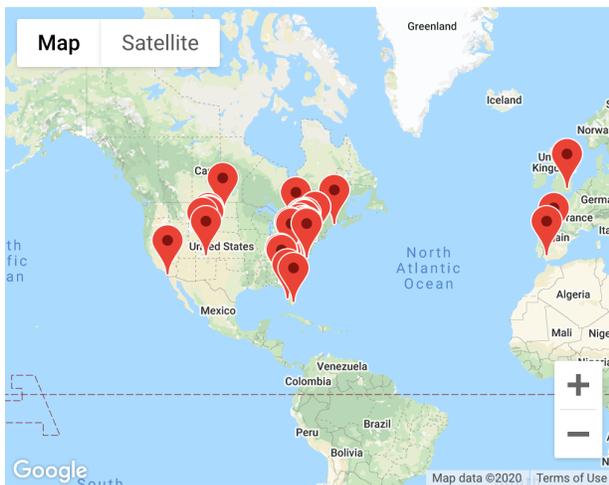
LOCATIONS

INCIDENTS

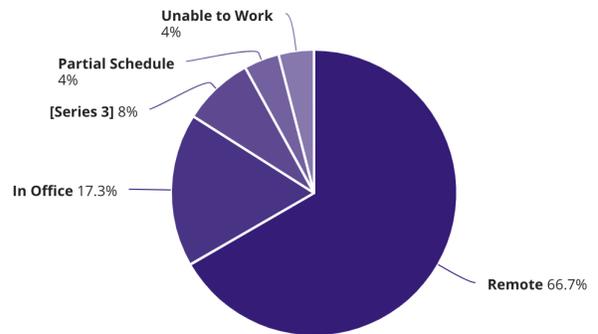
HELP REQUESTS

### User Distribution

Locations



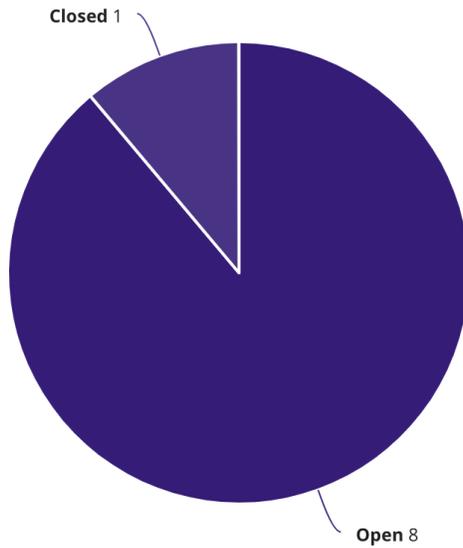
Work Capacity



### Locations report

The **LOCATIONS** report shows the status of your locations and allows drilling to view what locations have each status.

## Location Status

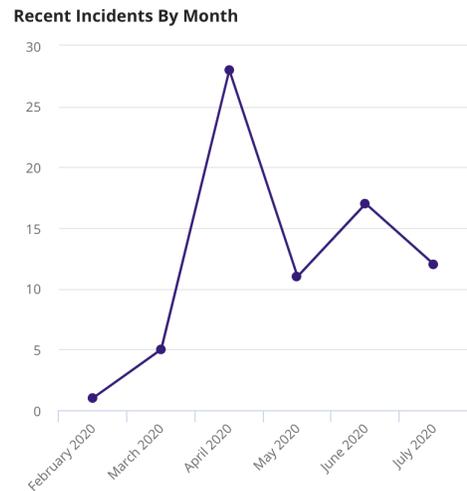
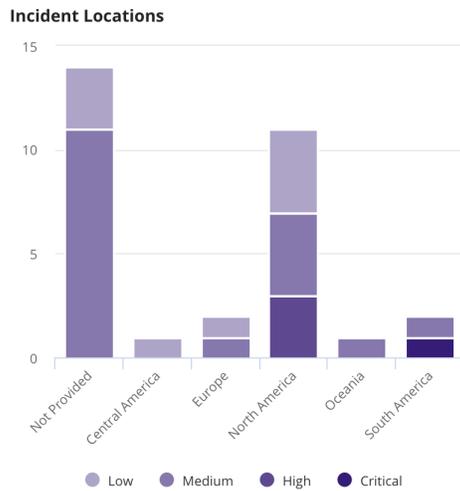


### Incidents report

The **INCIDENTS** report shows graphs of incidents by region for further drill-down:



### Incident Statistics



### Incident Details

Title	Status	Created	Urgency	Type	Location	Assignee
65 - Check-In Incident - Robert Ward	Unassigned	Jul 6	-	Check-in response	-	-
64 - Check-In Incident - Carl Peters	Unassigned	Jul 6	-	Check-in response	-	-

### Help Requests report

The **HELP REQUESTS** report shows summary level statistics on the numbers of requests assigned per volunteer to assist with load balancing duties:

20

TOTAL HELP REQUESTS

18

OPEN HELP REQUESTS

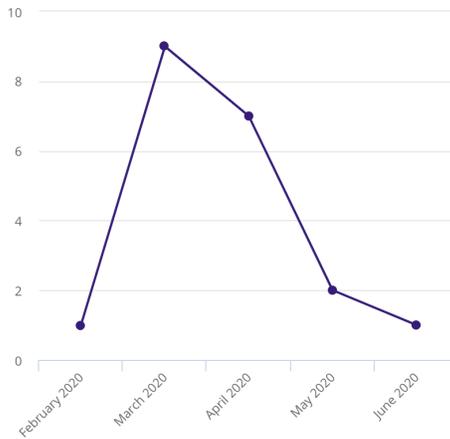
0

HELP REQUESTS THIS MONTH

### Help Request Statistics

- 5**  
Unassigned
- 10**  
In Progress
- 3**  
Closed
- 2**  
Cancelled

Recent Help Requests By Month



Top Volunteers

Volunteer	Requests
Robert Ward	5
Mary King	2
Charles Parker	2
Sally Taylor	2
Ben Johnson	1
Sharon White	1

6 items

### Help Request Details

Title	Status	Urgency	Location	Volunteer	Requested On
Help with driving my clothes to the cleaner.	In Progress	Medium	Springfield, MA, USA	Ben Johnson	Feb 29
Need to talk through resources for my kids	Closed	Medium	Virtual	Mary King	Mar 19

### Incidents page

The **INCIDENTS** page allows response managers to see all incidents and filter the list based on incident status, urgency, created by, assignee, and type. The user can also simply search for a specific incident.

Dashboard
Incidents
Help Requests
Volunteers
Configure

Response Hub
Appian

+ REPORT INCIDENT

Download
Filter
Refresh

SEARCH

STATUS | Any

URGENCY | Any

CREATED BY: | Any

ASSIGNEE | Any

TYPE | Any

Title	Status	Urgency	Type	Reporter	Assignee	Affected Person(s)	Created By	Updated On
65 - Check-In Incident - Robert Ward	Unassigned	-	Check-in response	Robert Ward	-	-	System Admin	Jul 6
64 - Check-In Incident - Carl Peters	Unassigned	-	Check-in response	Carl Peters	-	-	System Admin	Jul 6
67 - Check-In Incident - Sandra Taylor	Unassigned	-	Check-in response	Sandra Taylor	-	-	System Admin	Jul 5

If the response manager clicks **REPORT INCIDENT**, they can add incident details, contact details, and any relevant files or documents. Incidents can be assigned to a response manager who will see the incident request through completion.

# Add New Incident

Please note that any Personal Health Information contained in this incident ticket will be viewable by individuals that are responsible for reviewing and responding to incidents. Please follow your organization's HIPAA policies with respect to Personal Health Information being submitted.

**Response Manager Details**

**Status \*** **Urgency: ? \***

Unassigned --- Select a Value ---

**Assignee**

**Incident Details**

**Type \***

COVID-19

**Title \***

*e.g., Sick employee attended event*

**Incident Location** **Incident Date**

--- Select a Location --- 07/10/2020

**Description ? \***

**Impact ?**

**Reporter Contact Details**

**Manually Input Contact Information**

**Name \***

**Who is affected by this incident?**

**Switch to User Search** ✕

**First Name \*** **Last Name \***

**Email Address** **Phone Number ?**

*e.g. 1234567890 or +1234567890*

[+ Add an Impacted Person](#)

**Attachments**

No files have been added

[+ Attach New File](#)

CANCEL

REPORT INCIDENT

## Help Requests page

On the **HELP REQUESTS** page, response managers can see all requests and can triage, or match requests to volunteers. Actions they may perform are:

- **MATCH WITH VOLUNTEER** to assign an unassigned request to a volunteer.
- **REASSIGN** to reassign an assigned request to a different volunteer.
- **CLOSE** an assigned request to signify that it has been fulfilled.

DASHBOARD
 INCIDENTS
HELP REQUESTS
 VOLUNTEERS
 CONFIGURE

Response Hub 
Appian

+ REQUEST HELP

URGENCY | Any

STATUS | Any

REQUEST DATE | Any - Any

Title	Status	Urgency	Location	Requested By	Requested On
Help with driving my clothes to the cleaner.	In Progress	Medium	Springfield, MA, USA	James Employee	Feb 29
Need to talk through resources for my kids	Closed	Medium	Virtual	James Employee	Mar 19

When clicking on a request, location and basic information about the requestor is displayed.

# I need help getting medication

REASSIGN CLOSE

Summary Related Actions

Unassigned

In Progress

Closed

Requests may contain Personal Health Information. Please follow your organization's policies for handling Personal Health Information under HIPAA when reviewing requests.

## Requestor Details

 Sally Bell  
sally.bell@example.com

I need help getting medication

High

In-Person

Running errands

Need ibuprofen

Reston, VA, USA

## Volunteer Details

 Mary King  
mccollough@appian.com

## 2 Comments:

 System Admin  
Apr 27

Status changed to: Unassigned

 System Admin  
Jun 11

Request Matched with Volunteer

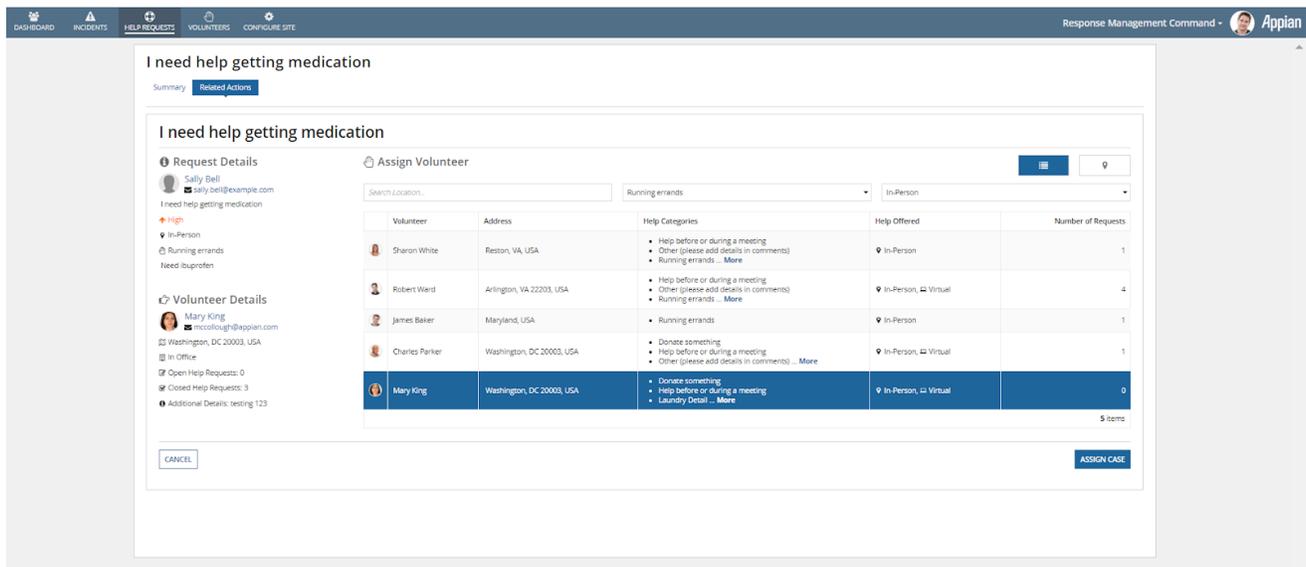
Write a comment...



COMMENT



When matching a request to a volunteer, the filter options are automatically set to only display volunteers that match the needs of the help request. Coordinators can match volunteers to help requests by clicking in the grid or selecting a pin on the map.



The screenshot shows the Appian interface for a request titled "I need help getting medication". The request details on the left include the requestor's name (Sally Bell), contact information, and specific needs like "Running errands" and "Need ibuprofen". The "Assign Volunteer" section on the right displays a table of available volunteers with their details and the number of requests they can handle.

Volunteer	Address	Help Categories	Help Offered	Number of Requests
Sharon White	Reston, VA, USA	• Help before or during a meeting • Other (please add details in comments) • Running errands ... More	• In-Person	1
Robert Ward	Arlington, VA 22203, USA	• Help before or during a meeting • Other (please add details in comments) • Running errands ... More	• In-Person, • Virtual	4
James Baker	Maryland, USA	• Running errands	• In-Person	1
Charles Parker	Washington, DC 20003, USA	• Donate something • Help before or during a meeting • Other (please add details in comments) ... More	• In-Person, • Virtual	1
Mary King	Washington, DC 20003, USA	• Donate something • Help before or during a meeting • Laundry Detail ... More	• In-Person, • Virtual	0

## Volunteers page

The **VOLUNTEER** page is only visible to coordinators or response managers, and shows a list of all registered and active volunteers within the organization for matching to help requests.

Volunteer	Location	Help Offered	Contact Info	Help Categories
Sally Taylor	Washington, DC, USA	In-Person, Virtual	kevin.lin@appian.com	<ul style="list-style-type: none"> <li>Cut Lawn</li> <li>Donate something</li> <li>Help before or during a meeting ... <a href="#">More</a></li> </ul>
Charles Parker	Washington, DC 20003, USA	In-Person, Virtual	jordan.mccollough@appian.com	<ul style="list-style-type: none"> <li>Donate something</li> <li>Help before or during a meeting</li> <li>Other (please add details in comments) ... <a href="#">More</a></li> </ul>
Mary King	Washington, DC 20003, USA	In-Person, Virtual	mccollough@appian.com	<ul style="list-style-type: none"> <li>Donate something</li> <li>Help before or during a meeting</li> <li>Laundry Detail ... <a href="#">More</a></li> </ul>

Clicking into a volunteer displays a summary of where the volunteer is last reported to be, and what types of assistance they are willing to provide.

## Ben Johnson

[UPDATE VOLUNTEER INFO](#)
[DELETE PROFILE](#)
[Summary](#)
[Related Actions](#)

### Contact Information



Ben Johnson

kevin.lin@appian.com

### Capability

**Help Format** In-Person

**Ways I Can Help** Running errands

### 0 Comments:



Write a comment...

COMMENT

### Volunteer Location

Based out of Maryland, USA



## Configure page

Response managers and configuration managers can view the **CONFIGURE** page which provides an ability to customize various options including locations, incident options, check-ins, and more. Users are also able to brand and tailor their site to better fit their organization.

Follow the instructions on the [Configuration Guide](#) page to configure the site.

[DASHBOARD](#)
[INCIDENTS](#)
[HELP REQUESTS](#)
[VOLUNTEERS](#)
[CONFIGURE](#)
Response Hub ▾  Appian

Tailor Workforce Safety to your organization's needs.

 MANAGE SITE FEATURES	 FACILITIES
 BRANDING	 AREAS
 INCIDENT OPTIONS	 DEPARTMENTS
 VOLUNTEER OPTIONS	 DELETE USER DATA
 CHECK-IN QUESTIONS	 SURVEY QUESTIONS
 HELPFUL LINKS	 PREVIEW QUESTIONNAIRE
 POLICY DOCUMENTS	 GUIDELINES



## Configuration manager features

Configuration managers have access to the Configure page in the Response Hub but they cannot see any user data. They can see and manage all of the site configuration options, except the **DELETE USER DATA** option.

See the [Configuration Guide](#) for more information on these tasks.

## Facility manager features

Facility managers have access to the Configure page in the Response Hub, but they cannot see any user data. They can see the **FACILITIES**, **DEPARTMENTS**, and **AREAS** configuration options.

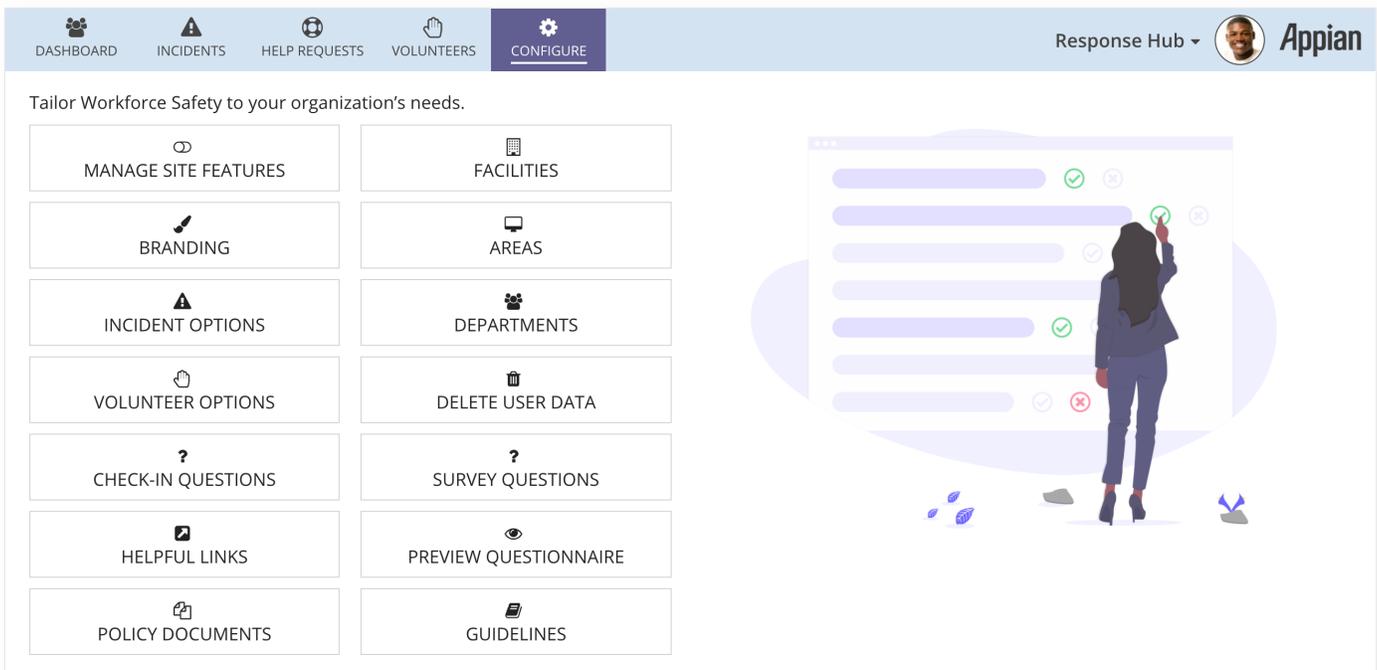
See the [Configuration Guide](#) for more information on these tasks.

# Configuration Guide

## Introduction

With Workforce Safety, business users are empowered to configure the site options from the Configure page. It allows them to:

- [Toggle certain site features](#), such as community volunteering, incident creation, and determining whether active incidents should prevent certain check-in behaviors.
- Change colors and logos to use for site [branding](#).
- Update incident locations and types for the [incident form](#).
- Update help categories for the [volunteer and help request forms](#).
- Create and update questions for the daily [check-in](#).
- [Create and update questions for the survey](#) that can be sent before users are able to start completing check-ins.
- [Preview the check-in](#) structure.
- [Manage guidelines](#) that display for users after they complete the check-in or survey.
- [Configure facility](#) locations, information, and statuses.
- [Configure areas](#) for each of your facilities and the maximum amount of workspaces for each area.
- [Configure departments](#) for your organization and where employees of the departments typically work.
- [Delete user data](#).
- [Update links](#) that display on the Helpful Links page.
- [Update documents](#) that display on the Policy Documents page.



This page describes how response managers can configure Workforce Safety from the **CONFIGURE** page on the **Response Hub**.

Users who are only in the Workforce Safety Users group do not have access to the Response Hub. Access for users who can see the Response Hub will be restricted to only the actions that they need to perform. For more information on what actions and information is accessible to members of the Workforce Safety security groups, see the [Groups Reference Page](#).

## Manage site features

Some features of Workforce Safety can be turned on or off. Response and configuration managers can toggle them off and on using the Manage Site Features option.

This section describes the features that can be toggled, as well as how to turn them on or off.

## Community Volunteering and Help Requests

### What is it?

The community volunteering and help requests feature helps strengthen workplace communities in a time of need with peer-to-peer support. Easily match volunteers with workplace community members in need of assistance.

This feature allows users to make a request for help or sign up to volunteer to fulfill these help requests.



### Need a helping hand?

Short on groceries? Just need some advice via video chat? Your colleagues are available to assist!

MAKE A REQUEST



### Want to volunteer?

Sign up to help your co-workers during these challenging times. You can help in-person or remotely!

SIGN UP

### What does turning it on do?

This feature is turned off by default. If you prefer to turn it on, users will see **Need a helping hand?** and **Want to volunteer?** sections on their homepage.

If you have used this feature in the past and decide to turn it off, users who have created help requests or signed up to volunteer will see a **Volunteering Feature** message. Options will display that allow them to view their submitted or assigned requests.



## Community Volunteering

The volunteering options are disabled on this site. If you have used it in the past, you can still view help requests that you created or were assigned to.

[VIEW SUBMITTED REQUESTS](#)

[VIEW ASSIGNED REQUESTS](#)

Additionally, in the **Response Hub**, if there are past help requests and volunteer information, they will still be visible, but the rest of the volunteer features will be disabled.

## User Incident Creation

### What is it?

This feature allows users to report an issue to response managers by creating an incident.

## Ready to check in

Complete the check-in survey to determine your workplace eligibility for today

[CHECK IN](#)

In need of assistance? See any unsafe behavior or missing safeguards? Your organization is here to help! [Report an Incident.](#)



### What does turning it off do?

If you prefer to turn this feature off, users will no longer see the message about reporting an incident and will not be able to create an incident.

If the user has reported an incident in the past, they will see an option to view their incidents.

Without past incidents

## Ready to check in

Complete the check-in survey to determine your workplace eligibility for today

[CHECK IN](#)

With past incidents

## Ready to check in

Complete the check-in survey to determine your workplace eligibility for today

[CHECK IN](#)

[View your Incidents.](#)



If there are questions responses in the survey or check-in that have **Create Incident** selected, an incident will still be created on behalf of the user. Likewise, toggling this feature has no effect on the ability of response managers to create incidents.

## Check-Ins Disabled by Active Survey Incidents

### What is it?

When survey questions are being configured, certain responses can be configured to automatically create an incident to alert response managers. When this feature is toggled on, response managers must close incidents that are created from a survey before the affected user can check-in.

If the survey is [not activated](#), this feature toggle does not display.

### What does turning it off do?

If toggled off, incidents created from survey responses have no effect on users being able to check in.

## Return Passes Disabled by Active Check-In Incident

### What is it?

When check-in questions are being configured, certain responses can be configured to automatically create an incident to alert response managers. When this feature is toggled on, response managers must close check-in incidents before the affected user can receive a return to workplace pass. The incidents effectively behave as a disqualifying response, even if the user does not have any disqualifying responses.

### What does turning it off do?

If toggled off, check-in incidents have no effect on return to workplace passes.

## Toggleing features

To turn features on or off:

1. Click **MANAGE SITE FEATURES**.
2. Click the toggle icon to make the feature  active or  inactive.
3. Click **SAVE CHANGES** and confirm that you want to make the change.

### Manage Feature Options

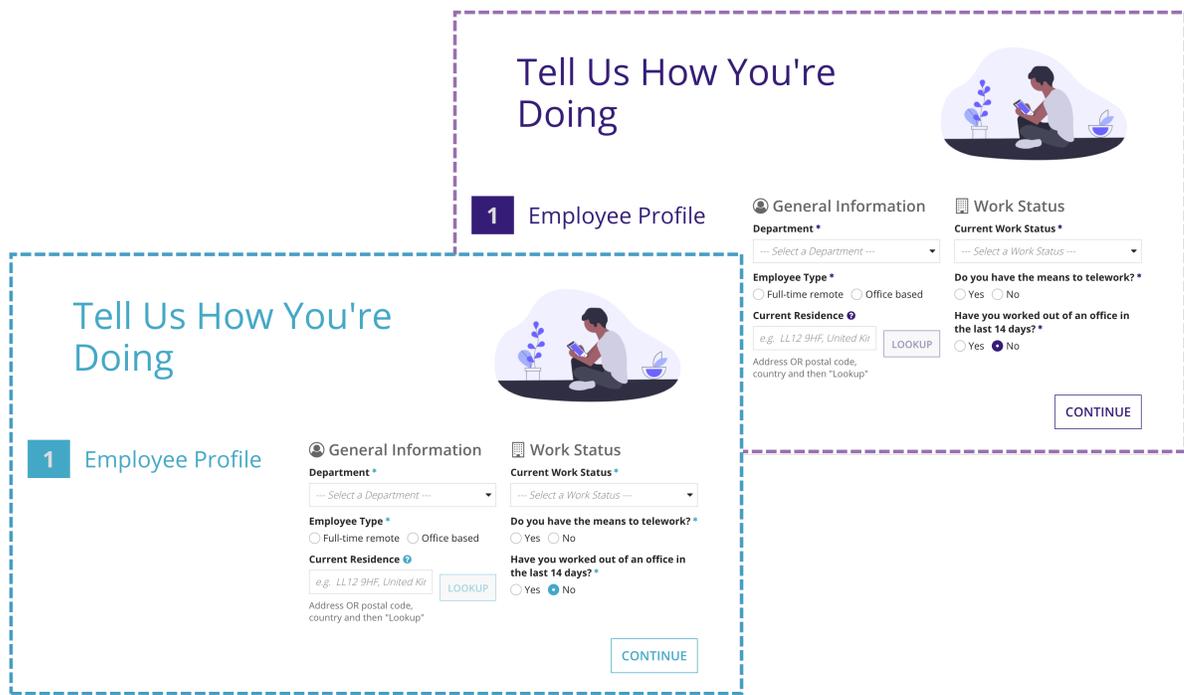
Use this form to manage the features of the site according to your organization's requirements.

Active	Site Feature	Description
<input type="checkbox"/>	Community Volunteering and Help Requests	When toggled on, allows users to create community help requests or sign up as volunteers for community help.
<input checked="" type="checkbox"/>	User Incident Creation	When toggled on, allows users to create new incidents. If toggled off, Response Managers can still create new incidents and configure questions to automatically create incidents when a user enters a certain response.
<input checked="" type="checkbox"/>	Check-Ins Disabled by Active Survey Incidents	When toggled on, requires response managers to close incidents that are created from a survey before the affected user can check-in. If toggled off, incidents created from survey responses have no effect on check-ins.
<input checked="" type="checkbox"/>	Return Passes Disabled by Active Check-In Incident	When toggled on, requires response managers to close check-in incidents before the affected user can receive a return to workplace pass. If toggled off, check-in incidents have no effect on return to workplace passes.

## Configure site branding

Response and configuration managers can tailor the look of Workforce Safety for your organization by changing the colors and logos.

1. Click **BRANDING**.
2. To change the main colors used in the Workforce Safety sites, update the hex codes for the colors in the **Site Color Palette**.
  - o **Tip:** The Site Accent color controls elements such as font, button, and tooltip elements.



- To change the colors used in charts on the **Dashboard** page in the **Response Hub**, update the hex codes for the **Chart Color Palette**.
  - Tip:** Preview your chart color selections on the pie chart to the right.
- Hover over the page icon until the **x** appears to remove the default **Logo** and **Favicon**. Click **UPLOAD** to upload your own logo and favicon.
- Click **SAVE CHANGES**.

## Configure Site Branding

Tailor the Workforce Safety and Readiness Site to your organization's branding.

Change the hex codes below to preview new colors. For reference in picking out hex codes to match your brand, check out the [Hex Code Color Picker](#)

### Site Color Palette

Nav Bar Background	Selected Tab	Site Accent
#d4e3f1	#615e90	#351c76

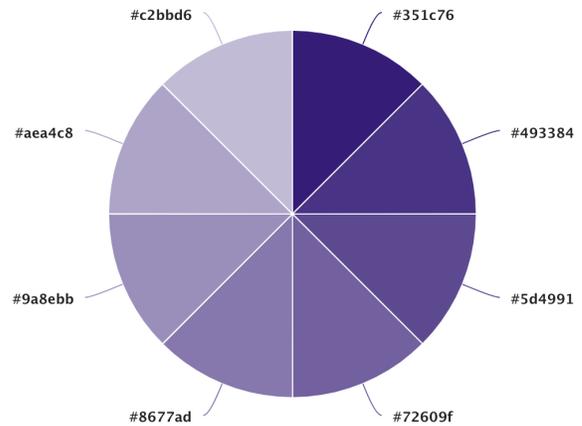
### Site Logos

Logo	Favicon
<b>sitesDefaultLogo</b> PNG - 1.57 KB	<b>sitesDefaultFavicon</b> ICO - 1.38 KB

### Chart Color Palette

Hex Code	Preview
#351c76	
#493384	
#5d4991	

### Sample Chart Branding Preview



## Configure incident options

Response and configuration managers can configure incident options.

When users fill out the incident form, they can choose a **Type** of incident, as well as the **Incident Location**. To get you started, the solution ships with default incident locations and types.

### Incident Details

**Type \***  
COVID-19

**Title \***  
*e.g., Sick employee attended event*

**Incident Location**      **Incident Date**  
--- Select an Office/Location ---      05/14/2020

**Description ? \***

**Impact ?**

After an incident option is added, it can't be deleted, but it can be renamed. This is also true for the default incident options.

To update or add incident options:

1. Click **INCIDENT OPTIONS**.
2. If necessary, rename the existing **Locations** or **Types**.
3. To add a new location for incidents, click **Add Location** and enter a new location.
4. To add a new type of incident, click **Add Type** and enter a name for the new type.

## Configure Incident Options

Use this form to manage the information that your organization uses when creating Incidents

### Locations

These are the items available for selection under "Location" in an Incident form. An aggregation of Incidents at these locations is displayed on the Reports tab

Locations	
North America	x
South America	x
Europe	x
Asia	x
Africa	x
Oceania	x
Caribbean	x
Central America	x
Middle East	x
<a href="#">+ Add Location</a>	

### Types

These are the items available for selection under "Type" in an Incident form. If you have other types of incidents that your organization can submit, add them here

Types	
COVID-19	x
<a href="#">+ Add Type</a>	

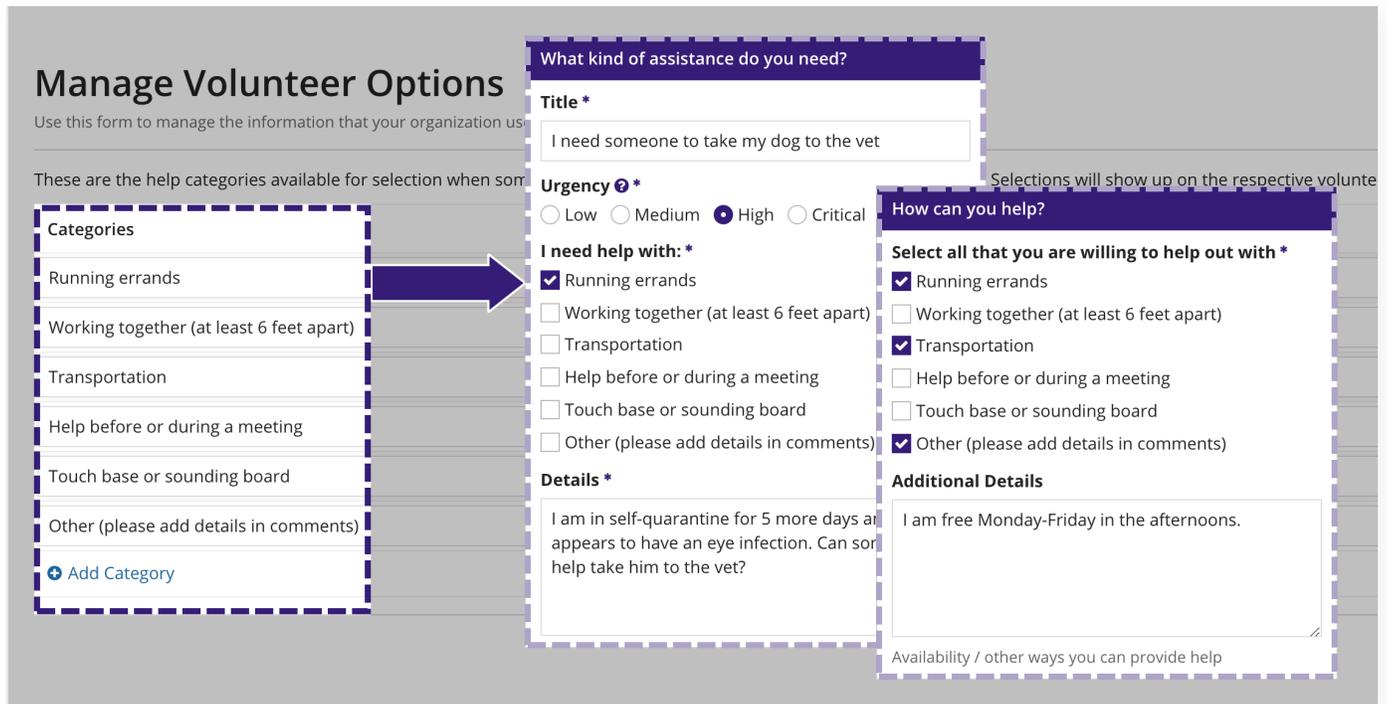
CANCEL

SUBMIT

# Configure volunteer options

Response managers, coordinators, and configuration managers can manage the volunteer categories.

Volunteer categories are used in help requests and volunteer forms. When users request help, they can select from these categories to indicate what they need help with. Volunteers can select from these categories to indicate how they can help. The solution automatically includes some default volunteer categories to get you started.



After a volunteer category is added, it can't be deleted, but it can be renamed. This is also true for the default volunteer categories.

To update or add volunteer categories:

1. Click **VOLUNTEER OPTIONS**.
2. If necessary, rename the existing **Categories**.
3. To add a new category, click **Add Category** and enter a new category.

# Configure check-in and survey questions

A check-in is a set of questions that users can respond to each day before they come to a workplace. You can use this to determine if a user should be able to come to the workplace based on their responses.

A survey is a set of questions that can be sent to users before they start doing daily check-ins. You can use this to gauge interest and ability to return to the workplace.

The solution comes with default check-in questions to get you started. These questions can't be deleted, but they can be modified or deactivated.

You can configure the following for each question:

- Whether the question will appear based on the response to a previous question.
  - **Example:** If a user answers *yes* to *Have you been tested for antibodies?*, you can ask the follow-up question, *Did your antibodies test return positive for COVID-19?*
- Whether the response type is yes/no, multiple choice, or short answer.
- Whether a certain response to the question will disqualify a user from returning to the workplace.
- Whether a certain response to the question will automatically create an incident.
- Whether a certain response to the question will require the user to upload a supporting document.
  - **Example:** A test result or note from a doctor.
- Which guidelines to display to the user for each response choice. See [Configure guidelines](#) for more information on adding and deactivating guidelines.
  - **Example:** If the user answers *yes* to a question about a health issue, you could display a guideline that says *Discuss with your healthcare provider on whether it is suitable for you to return to the workplace at this time.*
- Whether the question should display only for users at certain locations or users who have certain roles.

If an incident is created when a user fills out a check-in or survey, that incident will be updated each time a user fills out the check-in or survey again.

## Viewing and modifying questions

Response and configuration managers can manage check-in and survey questions by clicking **CHECK-IN QUESTIONS** or **SURVEY QUESTIONS**.

Icons next to each question display a quick view of whether the question:

- : Includes a response that disqualifies the user from returning to the workplace.
- : Includes a response that creates an incident.
- : Includes response that requires a file attachment.

## Check-In Questions

Check-ins can be completed by users once a day and determine if a user is eligible to return to their workplace. Configure the questions below that you want to include in the check-in.

<a href="#">+ ADD QUESTION</a>		<input checked="" type="checkbox"/> Only show active questions		
Active	Edit	Questions		
<input checked="" type="checkbox"/>		Do you currently exhibit any respiratory symptoms of COVID-19 (e.g., cough, shortness of breath)?		
<input checked="" type="checkbox"/>		Are you or any of the person(s) in your household experiencing symptoms (i.e., fever, cough, or shortness of breath) of, or tested positive for, COVID-19?		
<input checked="" type="checkbox"/>		Are you currently caring for anyone who is sick with possible COVID-19 symptoms?		
<input checked="" type="checkbox"/>		Have you been in close contact with others from outside your household within the last 14 days?		
<input checked="" type="checkbox"/>		Have you recently returned from traveling abroad within the last 14 days?		

You can modify existing questions by clicking the edit icon .

You can also reorder questions using the arrows . To reorder follow-up questions, click the edit icon for the question to edit it.

The screenshot shows a list of three questions in a table. The first question is "Have you tested positive for COVID-19?". The second is "Have you had at least 2 confirmed negative COVID-19 tests, spaced at least 24 hours apart?". The third is "Have at least 7 days passed since your first positive COVID-19 test?". A dashed blue box highlights the second and third questions. A blue line connects the edit icon of the second question to a configuration panel for that question.

**Question Options**

**Question** \*

Have at least 7 days passed since your first positive COVID-19 test?

This is a follow-up to a preceding question

**Preceding Question** \*

Have you tested positive for COVID-19?

**Display when this response is selected** \*

Yes

**Question Placement**

Question		
Have you had at least 2 confirmed negative COVID-19 tests, spaced at least 24 hours apart?		
Have at least 7 days passed since your first positive COVID-19 test?		

To deactivate a question, toggle the active icon to inactive .

## Follow up question limits

Initial questions can have as many follow-up questions as you need. Their follow-up questions can even have their own follow-up questions.

However, a question that is already nested under another question cannot have any follow-up questions.

The image below shows the limit to the number of nested follow-up questions that a question set can have.

Active	Edit	Questions		
<input type="checkbox"/>		<input type="checkbox"/> Have you tested positive for COVID-19?		
<input type="checkbox"/>		↳ <input type="checkbox"/> Have you been to an office within the last 14 days?		
<input type="checkbox"/>		↳ Did you have close contact with anyone in the office when you visited?		
<input type="checkbox"/>		↳ <input type="checkbox"/> Have you had at least 2 confirmed negative COVID-19 tests, spaced at least 24 hours apart?		
<input type="checkbox"/>		↳ Have at least 7 days passed since your first positive COVID-19 test?		
<input type="checkbox"/>		↳ Has your temperature been less than 99.9 F or 37.7 C, for the last 3 days?		

Questions on this level cannot have their own follow-up questions

## Response types

When you create a new question, you can select which response type you want the question to be: **Yes/No**, **Multiple choice**, or **Short answer**.

Yes/no questions will display a simple yes or no option to end users.

For multiple choice questions, you can add and edit numerous choices that a user can choose from. If there are less than five choices, users will select from a radio button list. If there are more than five, they will select from a dropdown list. Only one response can be selected by users.

For short answer questions, users can respond with free text or numbers. Their responses are limited to 255 characters.

## Adding a question

After you save the question you cannot edit the **Question Text** or the **Response Type**. For **Multiple choice** questions, you cannot edit or delete the choices, but you can add choices and reorder them.

To add a question to the check-in or survey:

1. From the **CONFIGURE** page, click **CHECK-IN QUESTIONS** or **SURVEY QUESTIONS**.
2. Click **ADD QUESTION**.
3. Enter the **Question**.
  - **Note:** You cannot add a duplicate question.
4. To configure the question to appear based on the response to a previous question:
  - Select **This is a follow-up to a preceding question**.
  - Choose the **Preceding Question**.
    - **Note:** Questions with short answer response types cannot be selected as a preceding question.
  - For **Display when this response is selected**, select the response that will trigger the follow-up question.
  - If there are multiple follow-up questions, you can reorder them using the arrows .

**Question Options**

**Question** ? \*

Have at least 7 days passed since your first positive COVID-19 test?

This is a follow-up to a preceding question

**Preceding Question** ? \* **Display when this response is selected** ? \*

Have you tested positive for COVID-19? Yes

**Question Placement**

Question		
Have you had at least 2 confirmed negative COVID-19 tests, spaced at least 24 hours apart?	↑	↓
Have at least 7 days passed since your first positive COVID-19 test?	↑	↓

- Choose whether the response type should be **Yes/No**, **Multiple choice**, or **Short answer**.
- If you choose multiple choice, enter the **Choices**. To add more choices, click **Add Choice**.

**Response**

**Type**

Yes/No  Multiple choice  Short answer

Choices	Require File Upload ?	Create Incident ?
Walk	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input type="checkbox"/>
Bus	<input type="checkbox"/>	<input type="checkbox"/>
Bike	<input type="checkbox"/>	<input type="checkbox"/>

[+ Add Choice](#)

- For yes/no and multiple choice question types, configure the response choices.
  - Choose whether a response choice should require a file upload.
  - Choose whether a response choice should create an incident.
  - Choose whether a response choice should be **Disqualifying**, meaning the user is ineligible to return to their workplace if they select that response.
  - Choose the **Guidelines to Apply** for each response choice.

**Response**

**Type**

Yes/No  Multiple choice  Short answer

Choices	Require File Upload ?	Create Incident ?	Disqualifying ?	Associated Guidelines ?
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	--- Select guidelines ---
No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Avoid touching your eyes, nose, and mouth

- If you want the question to display only for users in a certain location, under **Visibility** select **Only show this question to users in certain locations**.
  - To show the question to users in a certain country or state/province, enter the country and, if applicable, the state or province, then click **ADD**.
  - To show the question to users in a certain city that you have a facility located in, select a city, then click **ADD**.
  - Enter as many locations as you require.
- If you want the question to display only for users in certain roles, select **Only show this question to certain user roles**, then select the roles.

**Visibility**

Only show this question to users in certain locations

Country	State/Province	City	Remove
United States	Florida	-	<input checked="" type="checkbox"/>
United States	Colorado	Denver, CO	<input checked="" type="checkbox"/>

Only show this question to certain user positions

10. Click **SAVE CHANGES**.

## Activating and deactivating surveys

When you want users to be able to take the survey before they start checking in, activate the survey. When you have collected all of the responses you need and want to disable the survey, deactivate it.

If you deactivate all survey questions, the survey will be automatically deactivated. You must have at least one active question to activate the survey.

To activate or deactivate the survey:

1. From the **CONFIGURE** page, click **SURVEY QUESTIONS**.
2. If you are activating the survey, make sure you have at least one active question. To add questions, see [Adding a question](#).
3. Click **ACTIVATE SURVEY** or **DEACTIVATE SURVEY**.

✔ **Active.** The survey is currently available to users of the Workforce Safety site.
 DEACTIVATE SURVEY

✘ **Inactive.** The survey is not currently available to users of the Workforce Safety site.
 ACTIVATE SURVEY

After the survey is activated the [Check-Ins Disabled by Active Survey Incidents](#) toggle displays in the Manage Site Features configuration.

## Preview check-in questionnaire structure

Response and configuration managers can preview the check-in structure by clicking **PREVIEW QUESTIONNAIRE**.

In order to see the structure of the check-in by region, you can view the check-in by facilities or by country and state/province. Click the cards to follow the order of questions in the check-in.

The preview shows you the questions in the check-in and their possible responses. A red icon indicates the response disqualifies a user from returning to the workplace.

OFFICE

Valo Park Tower 1

Valo Park Tower 1  
McLean, VA

COUNTRY

United States

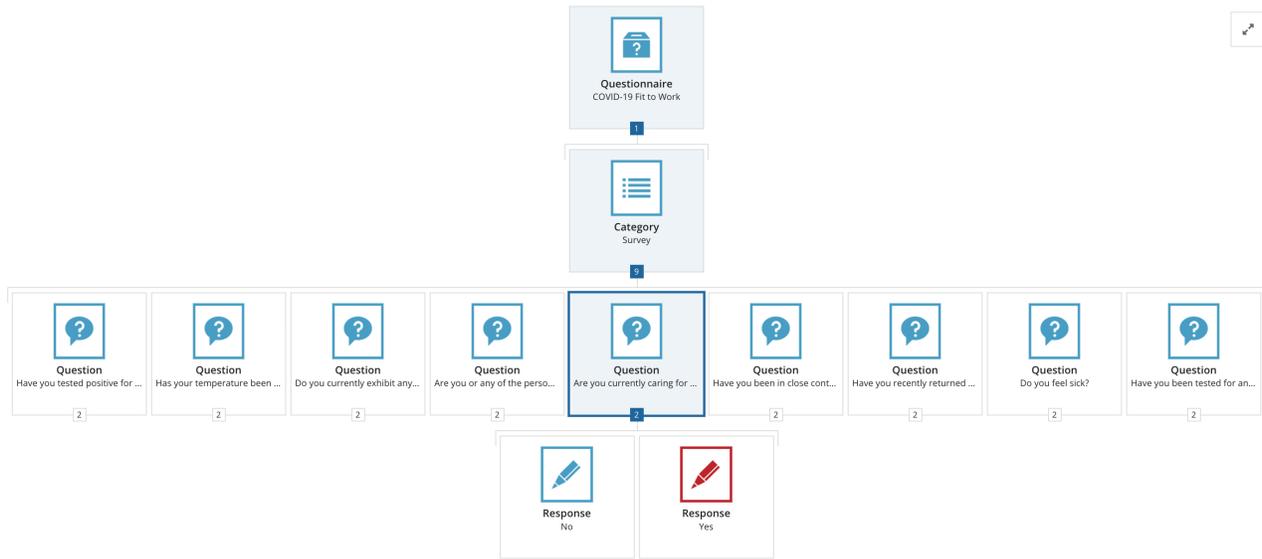
United States

STATE / PROVINCE

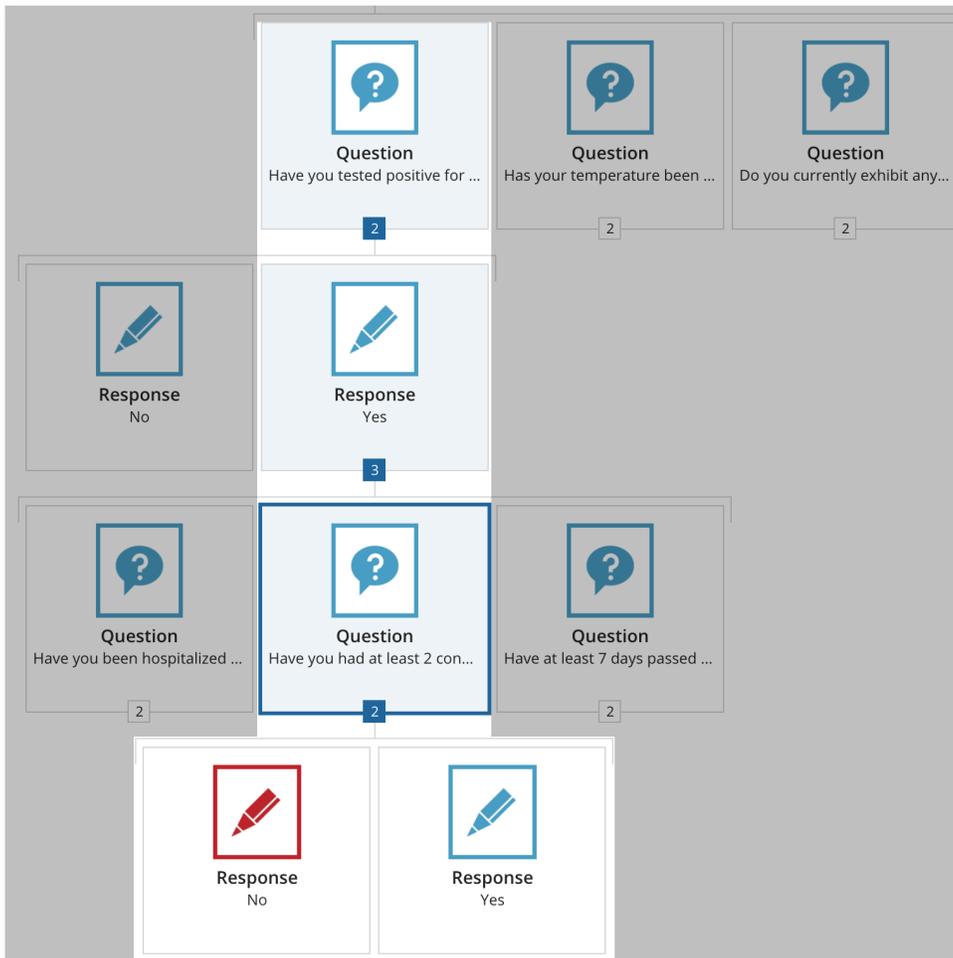
Virginia

Virginia

Questionnaire Structure Preview



If a question has follow up questions, those display as well.



### Configure guidelines

After a user checks-in, a **View Guidelines** link displays that shows them guidelines they should follow during the crisis. Workforce Safety comes with some guidelines out of the box, but response and configuration managers can update these guidelines by adding new ones and

deactivating old ones.

When you configure check-in questions, you can determine which guidelines display based on the user's response.

The screenshot shows the 'Workforce Safety' app interface. At the top left, there is a globe icon and the text 'Workforce Safety'. At the top right, there is a grid icon and a circular profile picture of a man. The main heading is 'Thank you for checking in'. Below this, there is a white box with a house icon and the text 'Continue working from home.' followed by 'You are advised to work from home based on your latest questionnaire responses.' A dashed purple box highlights a 'View Guidelines' button with a right-pointing arrow. Below the button, there is a link: 'In need of assistance? See any unsafe behavior organization is here to help! [Report an Incident](#)'. To the right, a larger dashed purple box highlights a detailed view of the 'Continue working from home.' guideline, which includes the same introductory text and a list of six guidelines, each with a thumbs-up icon: 'Wash your hands often with soap and water for at least 20 seconds', 'Avoid touching your eyes, nose, and mouth', 'Avoid close contact with people who are sick', 'Keep 6 feet between yourself and others', 'Wear a mask covering your nose and mouth when out in public', and 'Clean and disinfect frequently touched surfaces daily'. At the bottom of this detailed view is a 'Back' button with a left-pointing arrow.

To manage guidelines:

1. Click **GUIDELINES**.
2. Click **Add a Guideline** and enter a guideline.
3. To deactivate a guideline, toggle the active icon  to inactive .

# Manage Guidelines

Use this form to manage the guidelines that your organization uses in its questionnaire.

These are the guidelines available for selection when offering advice after a user finishes their questionnaire.

Guidelines	Active
Wash your hands often with soap and water for at least 20 seconds	<input checked="" type="checkbox"/>
Avoid touching your eyes, nose, and mouth	<input checked="" type="checkbox"/>
Avoid close contact with people who are sick	<input checked="" type="checkbox"/>
Keep 6 feet between yourself and others	<input checked="" type="checkbox"/>
Wear a mask covering your nose and mouth when out in public	<input checked="" type="checkbox"/>
Clean and disinfect frequently touched surfaces daily	<input checked="" type="checkbox"/>
Discuss with your healthcare provider on whether it is suitable for you to return to work at this time	<input checked="" type="checkbox"/>
<a href="#">+ Add a Guideline</a>	

CANCEL

SAVE CHANGES

## Configure facilities

Response managers, facility managers, and configuration managers can specify each facility, including their description, city, whether they are open or closed, and other information. After they have saved a facility, it cannot be deleted, but it can be modified.

To update facility information:

1. Click **FACILITIES**.
2. Add the city, country, and state or province for each of your facilities and click **NEXT**.

## Update Facilities

Update and add any facility information here.

LocationsFacilities

In this section, add or update any locations that you want to be used for your facilities. These locations will also be used for aggregate reporting, and available for selection on the Employee Health Check after the question "Have you worked out of an office location in the past week". We recommend broader location definitions.

Address or City	Country	State / Province	
Tysons Corner, VA	United States ✕	Virginia ✕	✕
New York, NY	United States ✕	New York ✕	✕
Boston, MA	United States ✕	Massachusetts ✕	✕
Denver, CO	United States ✕	Colorado ✕	✕
Sydney, NSW	Australia ✕	-	✕
San Francisco, CA	United States ✕	California ✕	✕

[+ Add Location](#)

CANCELNEXT

3. Configure each facility by adding the **Name**, **Description** (optional), **City**, **Status**, and **Info** (optional).

### Manage Facilities

Update and add any facility information here

CitiesFacilities

In this section, add or update the cities where your facilities are located.

Name	Description	City	Status	Info	
Valo Park Tower 1		McLean, NC	<input type="radio"/> Open <input checked="" type="radio"/> Closed	Closed for cleaning	✕
New York WeWork 1		New York, NY	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕
New York WeWork 2		New York, NY	<input checked="" type="radio"/> Open <input type="radio"/> Closed	Open weekdays from 10am - 4pm	✕
13th St		Sevilla, Spain	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕
Vaspar		Denver, CO	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕
Miami Spaces Unit		Miami, Florida	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕
Denver Main St		Denver, CO	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕
Europe HQ		London, England	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕
Gold Tower		Milan, Italy	<input checked="" type="radio"/> Open <input type="radio"/> Closed		✕

[+ Add Facility](#)

CANCELGO BACKPREVIEW FACILITIESSAVE FACILITIES

1. Click **SAVE FACILITIES**.

## Configure areas

After the facility information is entered, response managers, facility managers, and configuration managers can specify areas for each of their facilities, such as floors and conference rooms. They can also set the maximum amount of workspaces for each area. This information can help with capacity planning.

To manage areas for your facilities:

1. Click **AREAS**.
2. Configure each area by adding the **Area Name**, **Facility**, and **Maximum Occupiable Workspaces**.
3. Click **SUBMIT**.

Area Name	Facility	Maximum Occupiable Workspaces	
Floor 9	HQ	100	✕
Floor 11	HQ	120	✕
Kitchen	HQ	25	✕
Auditorium	Denver HQ	150	✕
Floor 8	New York WeWork	100	✕
Floor 4	San Francisco WeWork	39	✕

[+ Add Area](#)

## Configure departments

Workforce Safety allows response managers, facility managers, and configuration managers to specify the departments that are unique to your organization. They can also link departments to the facilities and areas where employees of those departments typically work. Linking facilities, areas, and departments helps ensure your employees can maintain safe social distancing.

To manage departments for your organization:

1. Click **DEPARTMENTS**.
2. To add a new department, click **ADD DEPARTMENT**.
  - o Enter the department **Name**.
  - o Select a **Facility** and one or more **Areas** that the department normally reports to. If employees of the department can report to any areas in that facility, select **All Facility Areas**.
  - o If employees of the department can report to multiple facilities, click **Associate with an Additional Facility**.
  - o Click **SUBMIT**.
3. To edit a department, click the edit icon .
  - o To edit the **Name**, click the edit icon and enter a new name.
  - o Edit the **Facility**, **Areas**, or **Associate with an Additional Facility**, then click **SAVE CHANGES**.

## Edit Department

Set up department information and link the department to all facility areas where those department employees mainly work.

Name

Finance

Where should this department report to?

Facility *	Areas *	
HQ	Floor 9, Floor 11	<input type="checkbox"/> All Facility Areas ✕
HQ2	All Facility Areas	<input checked="" type="checkbox"/> All Facility Areas ✕

[+ Associate with an Additional Facility](#)

CANCEL

SAVE CHANGES

## Delete user data

If a user requests to have their data removed from Workforce Safety, response managers can do this using the Delete User Data option. This option allows you to delete user check-in and survey responses, help requests, incidents, or volunteer information.

Deleting data affects assignments for existing incidents and help requests. For example, if a volunteer is assigned to a help request and their data is deleted, the help request will become unassigned.

You can't delete specific rows of information. You can only delete all of the information of a certain type.

To delete user data:

1. Click **DELETE USER DATA**.
2. Use the **User** picker to find the user.
3. Click the delete button for the data that you would like to remove.
4. Confirm that you would like to delete the data.
5. Repeat for each information type.

## Delete User Data

Delete check-ins and surveys, help requests, incidents, or volunteer information for a specific user

**User \***

 Sally Taylor ✕

### Check-Ins and Surveys

[DELETE CHECK-INS AND SURVEYS](#)

Name	Reporter	Date
Check In - 28 minutes ago	Sally Taylor	7/14/2020
Survey - 28 minutes ago	Sally Taylor	7/14/2020
Check In - Jun 26	Sally Taylor	6/26/2020

### Help Requests

[DELETE HELP REQUESTS](#)

Name	Status	Date
Could someone pick up my groceries?	In Progress	5/7/2020
I need help picking up groceries	Unassigned	5/1/2020
Please mail some supplies	Unassigned	4/16/2020

« < 1 - 3 of 7 > »

## Configure helpful links

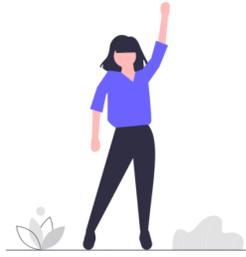
During a crisis, information is constantly changing. That is why Workforce Safety allows response and configuration managers to share helpful links with users. These links are accessed on the Workforce Safety site by clicking **Helpful Links**.



### Need a helping hand?

Short on groceries? Just need some advice via video chat? Your colleagues are available to assist!

[VIEW YOUR REQUESTS](#)



### Thanks for signing up!

It looks like none of your coworkers need your help yet. To update your volunteer details, click below.

[UPDATE DETAILS](#)

Helpful Links

📍 Workforce Safety 👤 Appian

[← Back](#)

📌 Helpful Links

---

[Centers for Disease Control and Prevention Website](#)

---

[World Health Organization Website](#)

To update helpful links:

1. Click **HELPFUL LINKS**.
2. To add a link, click **Add Link** and add a **Description** and **Link**.
  - **Note:** The description will be used as the display text for the link.
3. If necessary, update the **Description** or **Link** for existing links.
4. To delete a link, click the red **x**.
5. Click **SAVE LINKS**.
6. To preview how the links will display, click **Preview Links**.

## Update Helpful Links

Update and add any new helpful links here. Please verify that all links begin with https:// or http://

Description ?	Link	
Centers for Disease Control and Prevention Website	<a href="https://www.cdc.gov/coronavirus/2019-nCoV/index.ht">https://www.cdc.gov/coronavirus/2019-nCoV/index.ht</a>	✗
World Health Organization Website	<a href="https://www.who.int/emergencies/diseases/novel-cor">https://www.who.int/emergencies/diseases/novel-cor</a>	✗
<a href="#">+ Add Link</a>		

### Preview of Helpful Links:

[Centers for Disease Control and Prevention Website](#)

---

[World Health Organization Website](#)

[CANCEL](#)

[PREVIEW LINKS](#)

[SAVE LINKS](#)

A crisis situation may lead to rapid changes in policies. Response and configuration managers can ensure that their users have access to the latest policies in one place using the **Policy Documents** link on the Workforce Safety site.

**Need a helping hand?**  
Short on groceries? Just need some advice via video chat? Your colleagues are available to assist!

[VIEW YOUR REQUESTS](#)

**Thanks for signing up!**  
It looks like none of your coworkers need your help yet. To update your volunteer details, click below.

[UPDATE DETAILS](#)

Helpful Links

[Policy Documents](#)

Offices

Version 3.0

**Workforce Safety** Appian

[← Back](#)

**Policy Documents**

Document
Appian_COVID-19_Policy
OSHA_COVID-19_Guidance

To update policy documents:

1. Click **POLICY DOCUMENTS**.
2. To add a new document, click **Attach New File**.
3. Click **UPLOAD** and choose a document.
4. To archive a document so that it no longer displays to users, click the archive icon .

## Update Policy Documents

Add new policy documents here. Any 'Active Documents' that are deleted will be moved to 'Archived Documents' after submission

---

Appian_COVID-19_Policy.pdf	
OSHA_COVID-19_Guidance.pdf	

[+ Attach New File](#)

[CANCEL](#) [SUBMIT](#)

## Groups Reference Page

### Introduction

Workforce Safety uses [groups](#) to give users access to different parts of the solution. By adding users to these groups, you give them access to certain actions and information within Workforce Safety.

This page lists the default groups provided with Workforce Safety and what access is granted to members of those groups.

## Actions users can perform based on their group membership

This table lists the information and actions that are available in Workforce Safety and the groups that control access to them.

Actions	Users	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Receive process errors and manage users and groups		X					
View the COVID-19 Workforce Safety site	X	X	X	X	X	X	X
Answer the check-in	X^	X^	X*	X^	X^	X^	X*
Answer the survey	X^	X^	X*	X^	X^	X^	X*
Report an incident	X^	X^	X^	X^	X^	X^	X*
Request help	X^	X^	X^	X^	X^	X^	X^
Volunteer personal time	X^	X^	X^	X^	X^	X^	X^
View and update incidents	X^	X^	X^	X^	X^	X^	X*
View and update help requests	X^	X^	X^	X^	X*	X^	X*
View helpful links, policy documents, and facilities	X	X	X	X	X	X	X
View the Response Hub		X	X	X	X	X	X

<b>Actions</b>	<b>Users</b>	<b>Administrators</b>	<b>Screeners</b>	<b>Facilities Managers</b>	<b>Coordinators</b>	<b>Configuration Managers</b>	<b>Response Managers</b>
Configure departments, areas, and facilities				X		X	X
Scan user mobile passes			X				X
Check-in on behalf of users			X				X
View information from latest check-in (About You info and check-in responses)			X				X
View and manage volunteers on Volunteer page					X		X
View Help Requests page					X		X
View Help Requests report on Dashboard page					X		X
Configure volunteer options					X	X	X
Manage Site Feature - Enable or disable Community Volunteering and Help Requests					X	X	X

<b>Actions</b>	<b>Users</b>	<b>Administrators</b>	<b>Screeners</b>	<b>Facilities Managers</b>	<b>Coordinators</b>	<b>Configuration Managers</b>	<b>Response Managers</b>
Manage Site Feature - Enable or disable User Incident Creation						X	X
Manage Site Feature - Enable or disable Check-Ins Disabled by Active Survey Incidents						X	X
Manage Site Feature - Enable or disable Return Passes Disabled by Active Check-In Incident						X	X
Configure incident options						X	X
Configure and preview check-in and survey questions						X	X
Configure site branding, policy documents, guidelines, and links						X	X
View all reports on Dashboard page							X

<b>Actions</b>	<b>Users</b>	<b>Administrators</b>	<b>Screeners</b>	<b>Facilities Managers</b>	<b>Coordinators</b>	<b>Configuration Managers</b>	<b>Response Managers</b>
View Incidents page							X
Delete user data							X
View user profile information and all check-in and survey responses							X

\*For all employees

^Only for themselves