



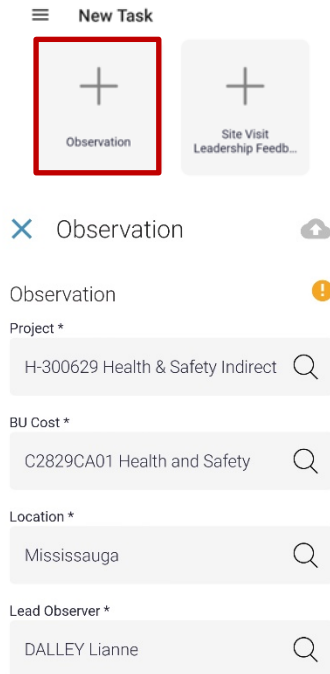
QR Code

ROAM 5.0 Entering an Observation - Quick reference guide

To start using **ROAM 5.0**, download the **ROAM 5** app from the iTunes stores or Google Play. Allow ROAM to access your camera in order to scan the QR Code. Once the scan is successful, sign into the application by entering your Hatch network log-in ID (e.g. smit22779) and network password. To complete an observation entry, follow the steps below:

Entering an Observation

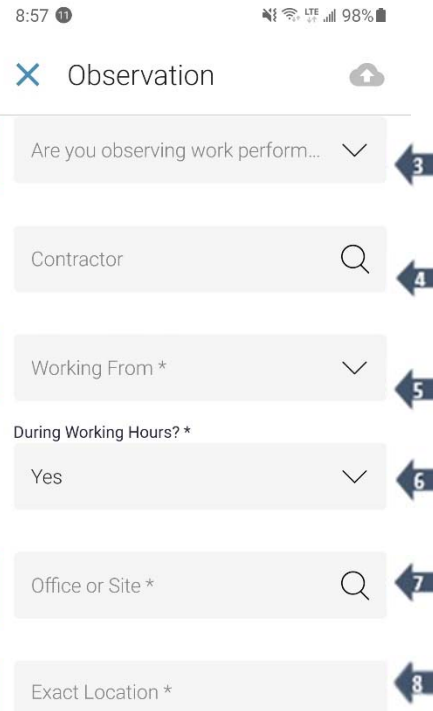
1. Select **Observation** from the *New Task* tab



Note: notations in red are mandatory fields.

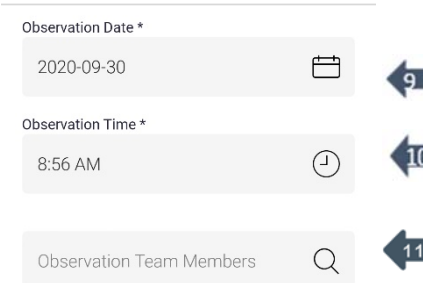
2. The **Project** or BU charge number, **BU Cost Centre**, reporting **Location** and **Lead Observer** fields are auto populated based on your iPas SM user profile data.

NOTE: For those completing observations for various sites or offices, you will be required to manually adjust these field entries or update your profile.

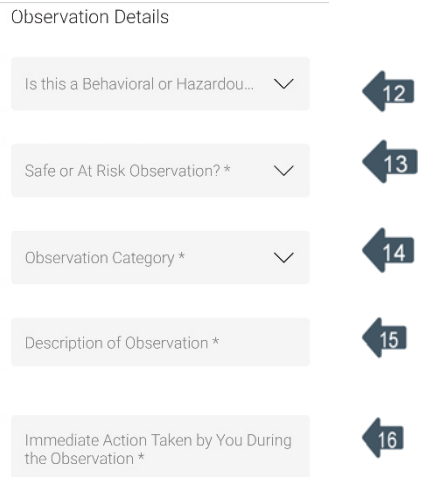


3. **Are you observing work performed by a contractor?** Select yes or no.
4. Select the **Contractor** that you are performing the observation on. Note: the contractor must be entered into iPas SM prior to selection.
5. Indicate if you are working from home, the office or site/client office.
6. Select if this observation was completed during working hours or not.
7. Find the **Office or Site** where the observation is taking place. If the Office/Site name does not exist, select **Office or Site not in list**.

8. Enter the **Exact Location** where the observation is taking place, i.e. – 2nd floor mechanical room.



9. The **Observation Date** is automatically generated or select from the calendar.
10. The **Observation Time** is automatically generated or enter the time of the observation.
11. Enter the names of the **Observation Team Members** who participated in the observation. Search by last name.



12. Select if your Observation is a **Behavioural** situation or a **Hazardous** condition.

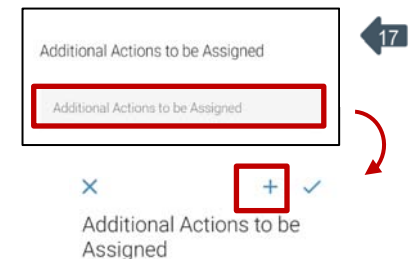
13. Select if your **Observation** is **Safe** or **At-Risk**.

14. Select the **Observation Category** that best reflect the observation completed. Note: the categories are not in alphabetical order.

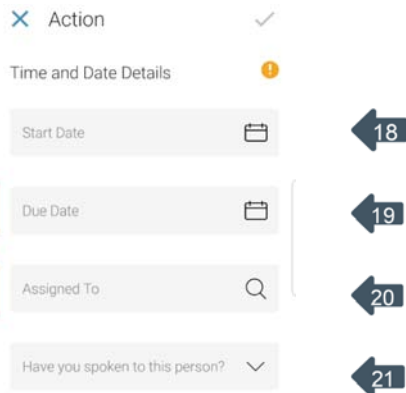
15. Enter a **Description of the Observation** that you completed.

16. Record the **Immediate Action** taken by you during the observation.

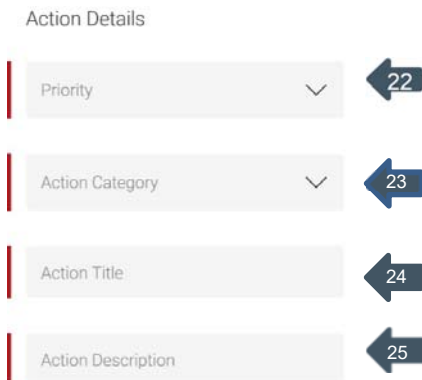
17. Click on **Additional Actions to be assigned** to assign an action associated with the observation:



Continued below...



- 18. Select Start Date from the calendar.
- 19. Select the action **Due Date** from the calendar.
- 20. Enter the person's name that the action is being **assigned to**. Note: an email will automatically be sent to this person advising them of the action raised. This person must be a Hatch employee.
- 21. Select Yes or No to indicate if you **have spoken to the person** that the action is being assigned to.



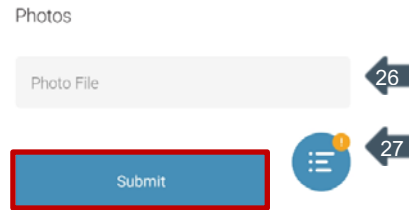
- 22. Select the **priority** of the action from the list.
- 23. Select the **Action Category** that will be used to complete the action.
- 24. Enter an **Action Title** to describe the action being entered.

25. Enter a **detailed description** of the new action.

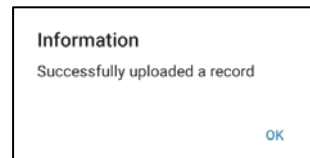
Click on the check mark to save your action.



26. Upload any supporting **Photos** associated with the observation.



27. Click **"Submit"** to save and complete your observation. The following message will confirm that your observation record has been successfully uploaded:



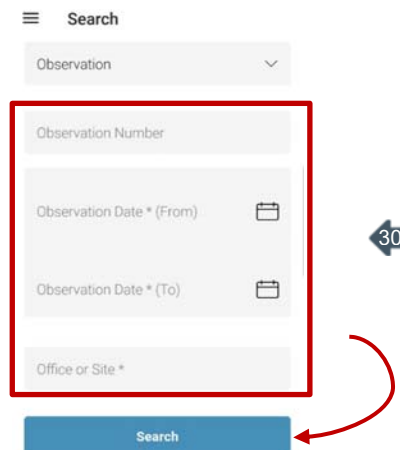
28. The ROAM App allows you to review and edit previously submitted observations. To complete this function, from the main screen, click on the magnify glass:



29. From the **Module** drop down menu, select **Observation** from list.



30. Enter your search criteria in the fields provided to locate your observations and click on the search button:



31. A list of your observations will be provided. Click on the observation to view or modify it.

Search Results

Observation (83)



32. To edit the observation, click on the pencil icon:



33. To save the changes and to upload your observation to iPasSM, click on the upload icon:



For all inquiries or technical difficulties that you may encounter, please submit a Zendesk (Infra) ticket.