myCority User and Administrator Guide 2020.1

Revision date: February 21, 2020

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Introduction

Through a simplified user interface, myCority makes it easy for employees who do not typically use Cority to complete EHS tasks such as the submission of event reports and the completion of questionnaires. myCority provides employees access to a subset of Cority workflows, which improves data quality, reporting, safety, and occupational health across the organization.

myCority enables employees to:

- **Find the Cority-related items assigned to a user all in one convenient location.** Streamlined navigation and filtering makes it easier to complete various EHS tasks and questionnaires.
- **Report events and complete questionnaires faster and easier than ever.** Simplified workflows mean that all users can quickly complete actions and assigned tasks. Users are provided with access to information and tasks that are pertinent to them only, which makes the application even more user-friendly.
- **View a configurable overview of all their medical information.** Depending on Cority's settings, users can view all the data in Cority that relates to them, from allergies and immunizations to medication and prescription details.
- **Leverage key Cority functionality on the go.** myCority is available for use on tablets and mobile phones - with the screen automatically scaling to the browser size - making it easy to use no matter where you are.
- **Work on questionnaires (including audits, inspections, and surveys) while offline.** Users can now work on and save questionnaires while offline and submit them when back online.

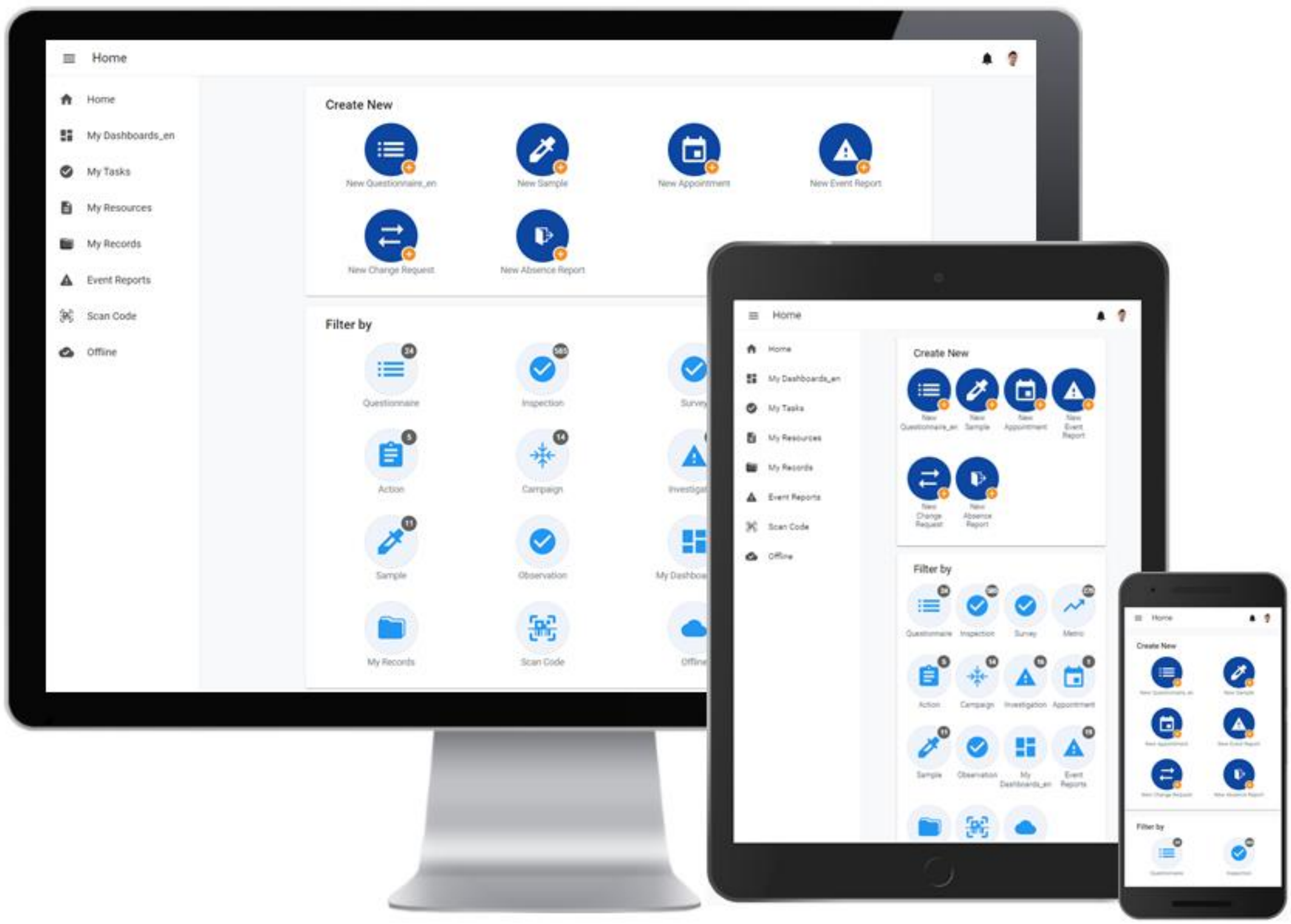
Supported Browsers and Operating Systems

myCority is supported by the following browsers and operating systems:

Supported Browsers	Supported Operating Systems
Apple Safari 9 and 10	Apple iOS 10, 11, and 12
Google Chrome	Android Lollipop 5.0 and 5.1
Microsoft Edge 14 and 15	Android Marshmallow 6.0
Microsoft Internet Explorer 10 and 11	Android Nougat 7.0
Mozilla Firefox 55.0.2 and 55.0.3	

Accessing myCority

You can access myCority from a web browser on your desktop, laptop, tablet, or mobile device. To access myCority, launch a web browser and enter the URL of your company's myCority site (https://mycompany.my.cority.com). **Note:** You may need to whitelist 'my.cority.com' in order to access the site.



Registering your Account

1. Launch a web browser and enter the URL of your company's myCority site. The login screen will display.
2. Click **Register**.
3. Complete the myCority Registration form. **Note:** An asterisk (*) indicates the field is required.
4. Click **Submit**. If the information you entered matches and employee record in the Cority platform, you will be directed to the myCority login page.

Logging In

To log into myCority, launch a web browser and enter the URL of your company's myCority site. The login screen will display. There is a 'Language' drop-down menu at the bottom of the login screen that will let you select your preferred language. The myCority application is available in the following languages:

- Brazilian Portuguese
- English
- German
- Spanish
- Chinese (simplified)
- French
- Japanese
- UK English

If you have not yet registered your account, complete the steps in Registering your Account, or click 'Guest Log In'. Guest login lets you use a Guest account. Users logged in as Guest and can only respond to online questionnaires and report incidents.

You must be connected to the internet to log into myCority.

SSO (Single Sign-on) Authentication

1. If you are using the SSO authentication method, the login screen will have **Proceed to Login** and **Guest Log In** buttons. If you click the **Proceed to Login** button, you will be directed to your organization's login page.
2. Enter your login credentials in your organization's login page. If your credentials are valid, you will be directed back to myCority.
3. Read the Privacy Agreement. When you are finished, click **Accept** to indicate you read and understand the agreement.

   Note: If you decline the Privacy Agreement, a message will display asking you to close the browser.

Other Authentication Methods

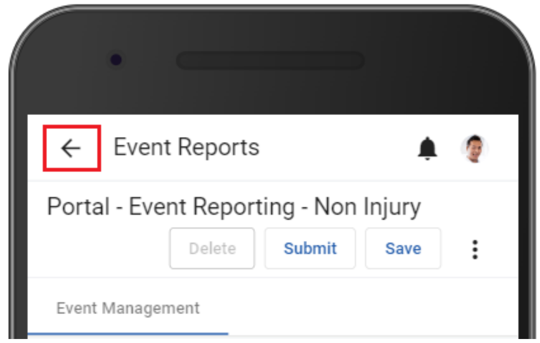
1. Enter your username and password and click the **Log In** button.
2. Read the Privacy Agreement. When you are finished, click **Accept** to indicate you read and understand the agreement.

   Note: If you decline the Privacy Agreement, you will be directed back to the login screen.

Logging Out

To log out of myCority, click your photo at the top right of the screen and select **Log Out**.

Navigation

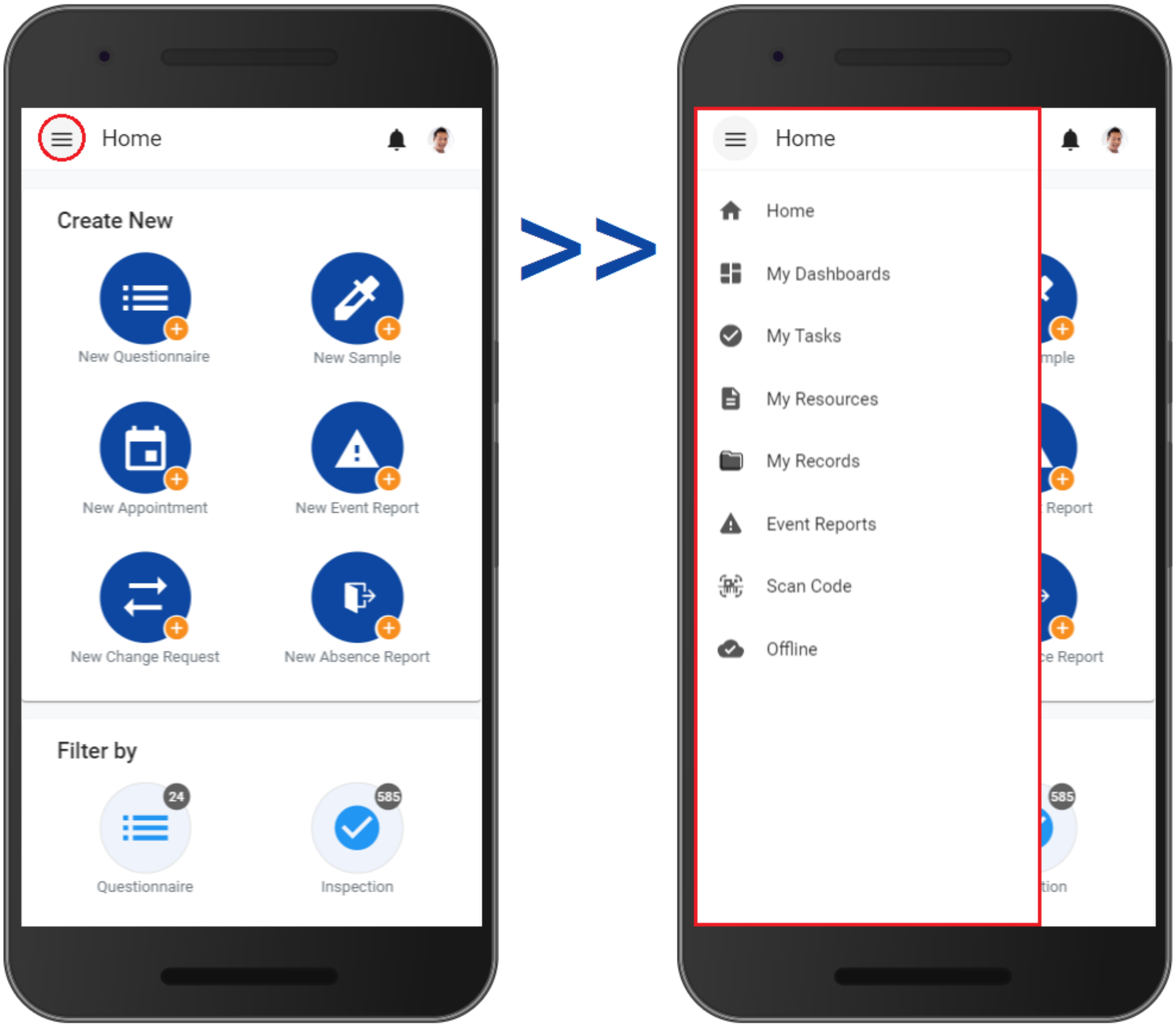


myCority's default view is Home, which displays items you have created or that have been assigned to you to complete. As you navigate the application, if you need to return to the previous page, use the **Back** button in the myCority application, rather than the button in your browser.

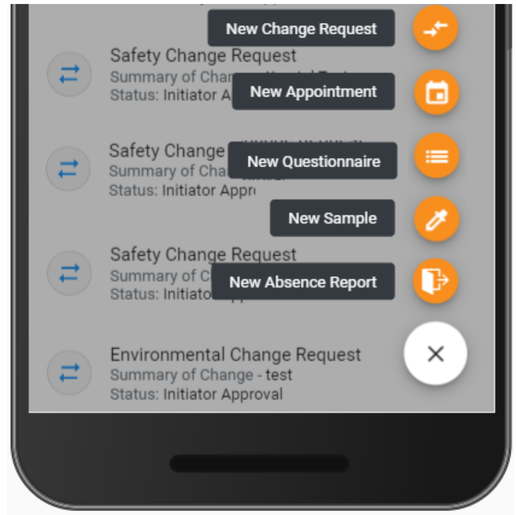
Note: When you scroll down on a record, the header and its buttons will be hidden. They will display as soon as you begin scrolling up.

Side Menu

In the top left corner of the screen there is a side menu button. When clicked, a side menu will expand to display the other views available in the application.



‘Create New’ Button

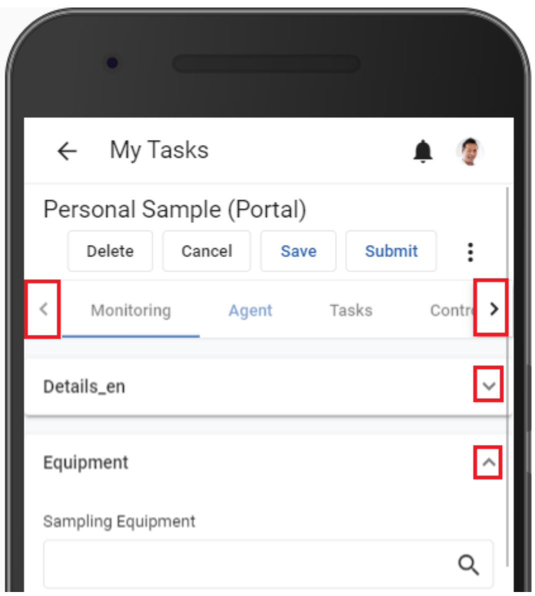


At the bottom right corner of the My Tasks and Evet Reports screens there is a **Create New** button. When clicked, the **Create New** button will allow you to create a new change request, appointment, questionnaire, sample, or absence report (if you are in My Tasks), or event report (if you are in Event Reports).

Note: If there are no questionnaires or samples in myCority, and the **Appointments** module is disabled, the **Create New** button will not display.

Record Layout

On a record, the various sections can be expanded or collapsed using the **Expand/Collapse** button at the top right of each section. Scroll down to view additional sections.

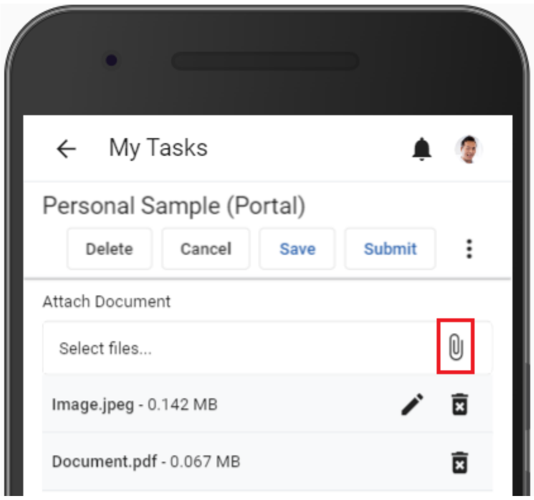


If the record contains tabs, they will display long the top of the screen. Click a tab to open it, or use the right/left arrows to view additional tabs.

Documents and Images

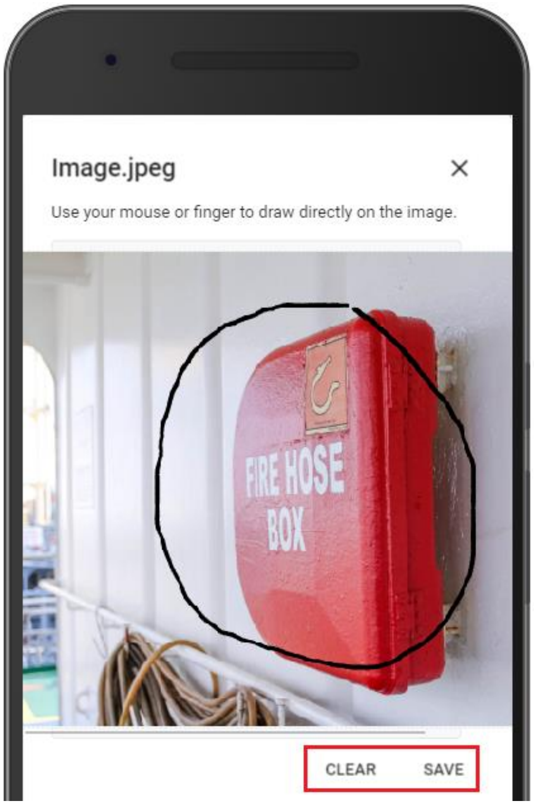
If a field or question in a record allows you to attach a document or image, a paperclip icon will display below the field/question. The icon will allow you to upload and attach one or more documents from your device.

Note: For some fields or questions, an attached document may be required.

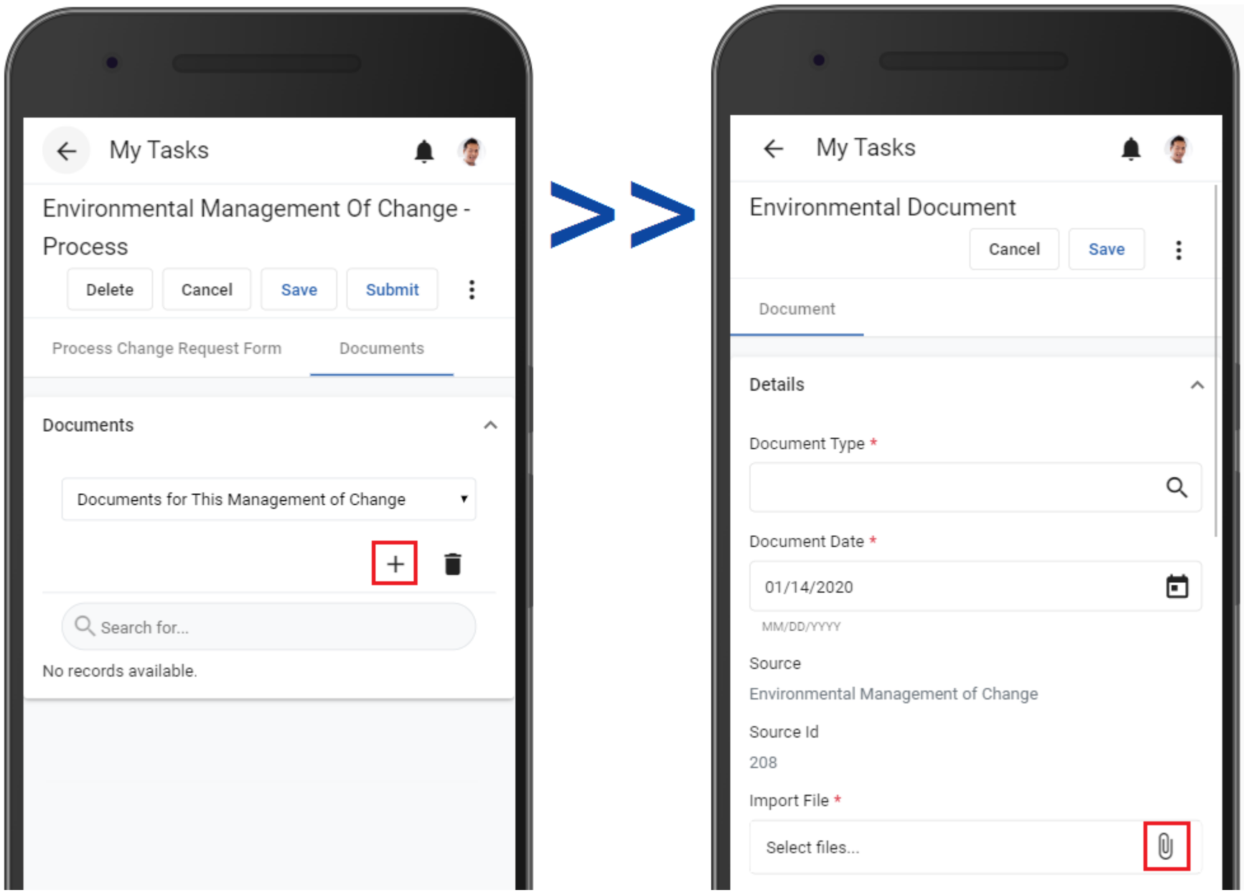


To remove a document or image from the list, click the **Delete** icon to the right of the file. If the file is an image, a **Pencil** icon will display next to the **Delete** icon.

When you click the **Pencil** icon, a preview of the image will display. You can then use the mouse or your finger to draw directly on the image. Click **Clear** to clear your annotation or **Save** to save it.

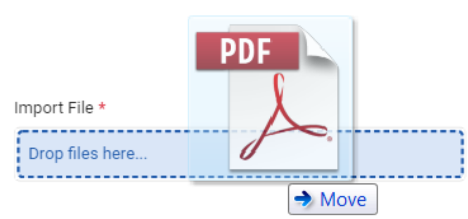


If a task or event report has a **Documents** tab, you can attach a document or image to the tab by clicking **+**. You will then be directed to the **<Suite> Documents** screen where you can import a file, and specify the document type, date, description, and other information.



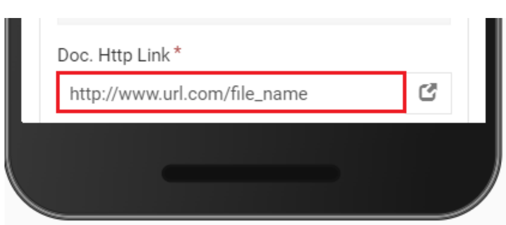
When you are finished completing the **<Suite> Documents** screen, click **Save**. The document will display in the record's **Documents** tab.

If you are using a desktop or laptop computer, you can also drag-and-drop files into that field.



To remove a document from the list, click the **Delete** icon to the right of the file.

The maximum allowable file size is determined by the **Maximum File Size For Documents** system setting in the Cority platform. If the file is too large to attach to the form, you can use the Doc. Http Link field to provide a link to the file instead. There is a **Go to URL** button to the right of the Doc. Http Link field. If you click the button, the URL will open in a separate window.



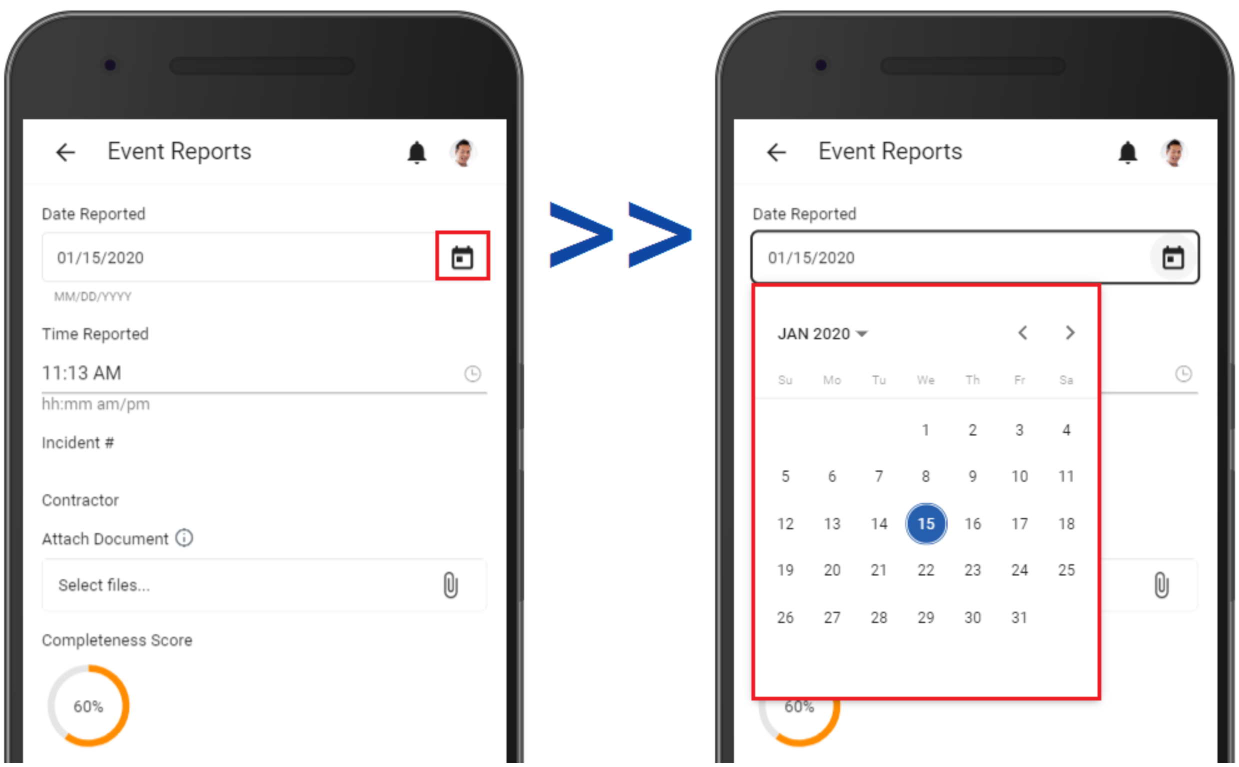
When you are finished, click **Save**. Repeat these steps for each file you'd like to add to the record.

myCority support the following file formats:

Audio	Image	Mail	Microsoft Excel	Microsoft PowerPoint	Microsoft Word	Misc.	Text	Video
.mp3 .wav .wma	.bmp .dcm .gif .jpg .jpeg .png .tif .tiff	.eml .mht .msg	.xls .xlam .xlsb .xlsm .xlsx .xltm .xltx	.potm .potx .pps .ppt .ppsm .ppsx .pptm .pptx	.doc .docm .docx .dotm .dotx .rtf	.pdf .prj	.txt .xml	.avi .mpg .mpeg .wmv

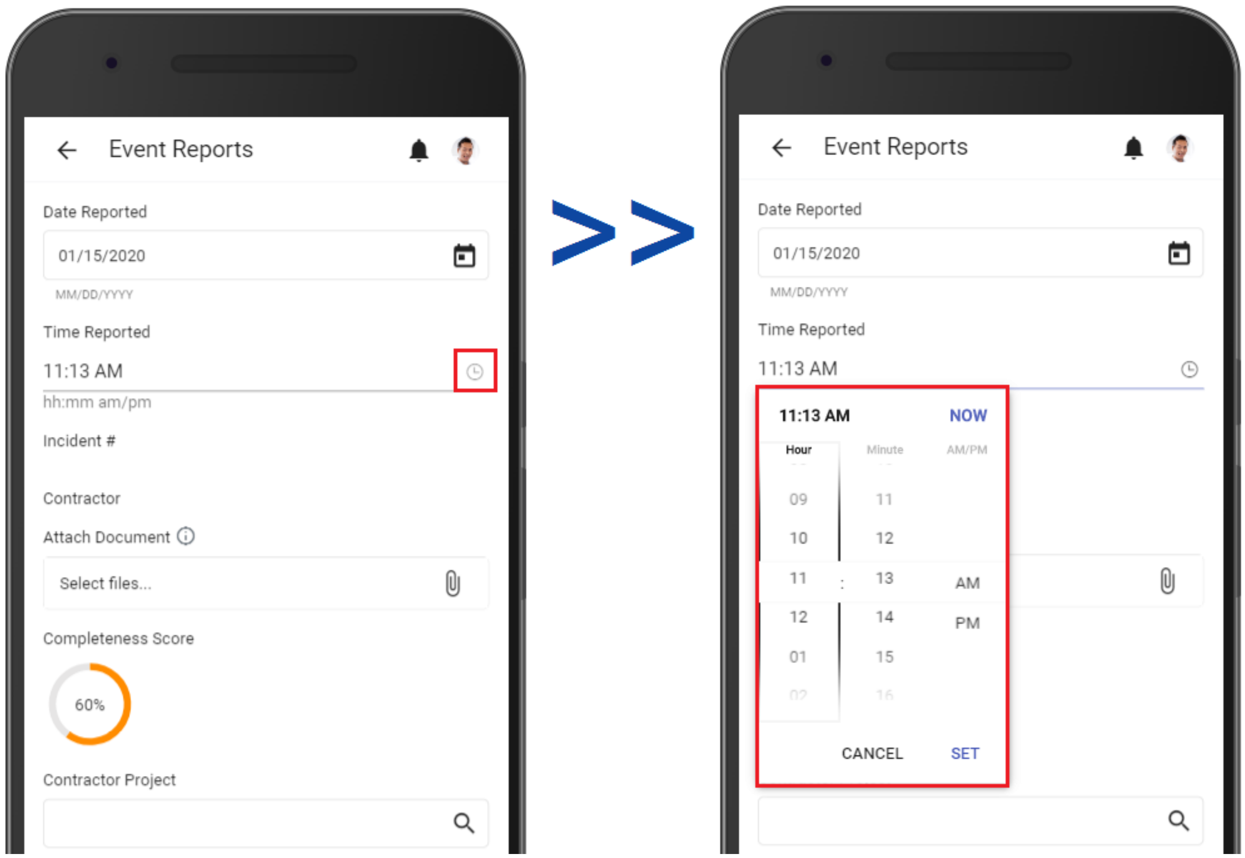
Date and Time Selection

When you are completing a task or event report, any date fields will have a **Calendar** icon to the right. When you click the **Calendar** icon, a date selector will display. Once you select a date and click the **X** icon, the date selector will close, and the selected date will display in the field.



Time fields will have a **Time** icon to the right. When you click the **Time** icon, a time selector will display. The time selector will hour and minute fields, and an **AM/PM** button. By default, the fields will display the current time. Use the up/down arrows to select a different time. If you click the **PM** button, it will change to **AM**; if you click the **AM** button, it will change to **PM**.

Once you have selected a time, click anywhere outside the time selector. The time selector will close, and the selected time will display in the field.

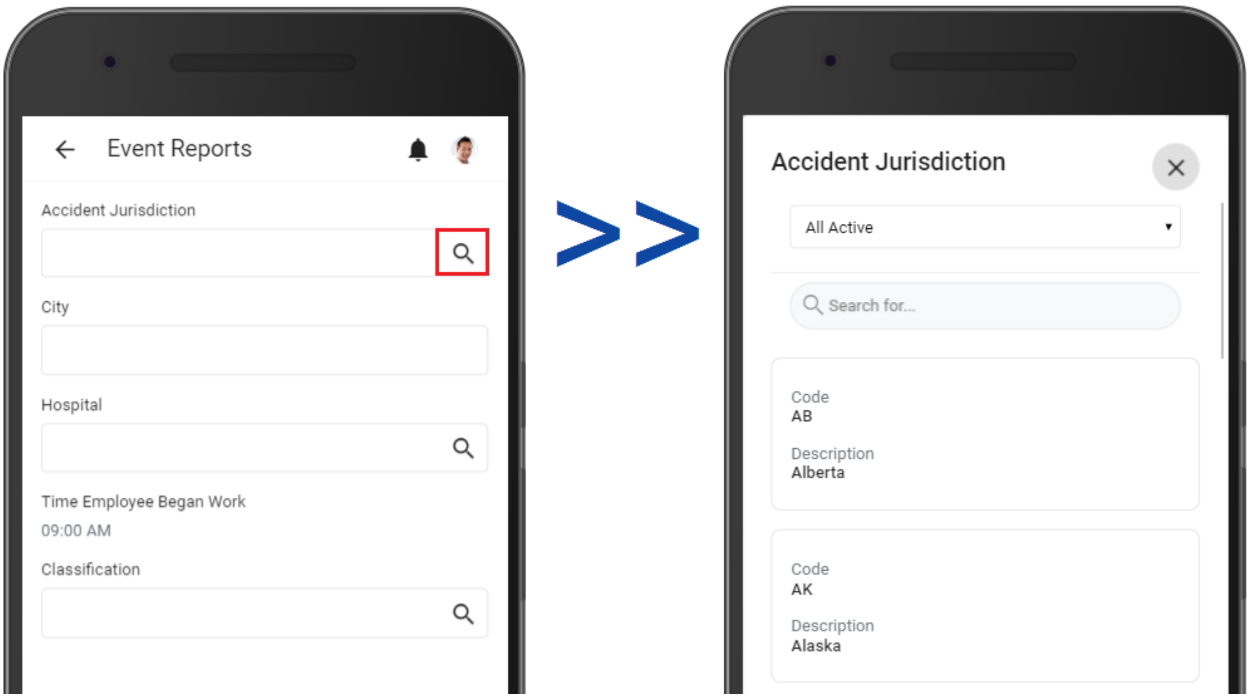


You can also place your cursor in the **Time Reported** field and manually enter a time.

Picklists

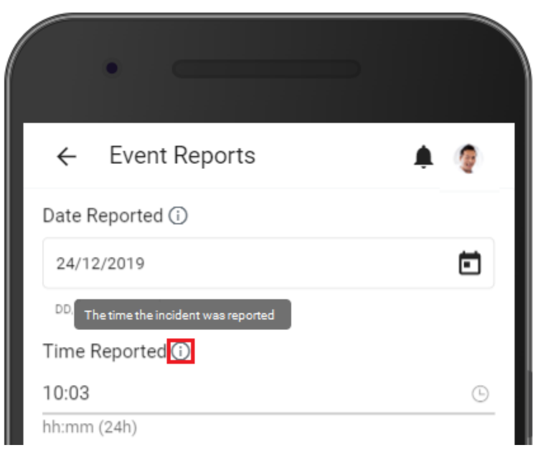
If a field has a related picklist, there will be a Magnifying Glass icon to the right. When you click the icon, a list of look-up table entries will display. The picklist will have a default list view. If you click the drop-down side menu, a list of all available list views will display. You can also use the search bar to search for a record.

Once you select an option, the picklist will close, and the selected option will display in the field.



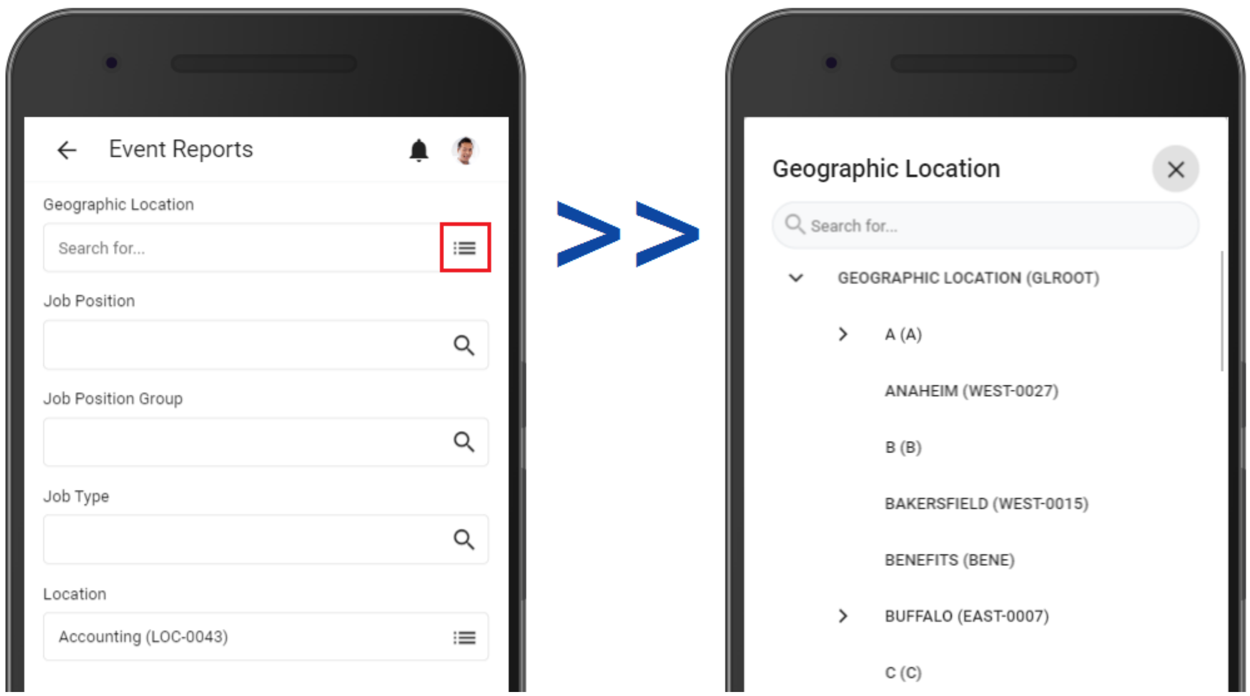
Tooltips

If a field has a tooltip, a Question Mark icon will display to the right. When you click or over the mouse over the icon, a description of the field will display.

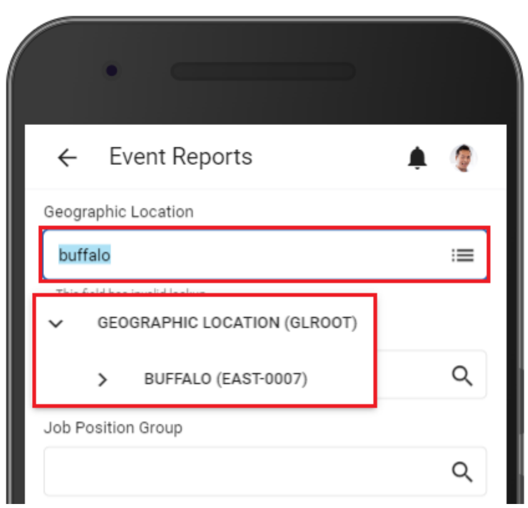


Tree Selectors

If a field has a related tree selector, there will be a Tree Selector icon to the right. When you click the icon, a list of tree nodes will display. To locate a tree node, expand the parent node, or use the search bar to search for it. Once you select a tree node, the tree selector will close, and the selected node will display in the field.



You can also search for a tree node by typing it in the field. A filtered list of tree nodes that match your search will display below the field. If you select a tree node from the search results, it will display in the field.



You can also perform a wildcard search to locate a tree node.

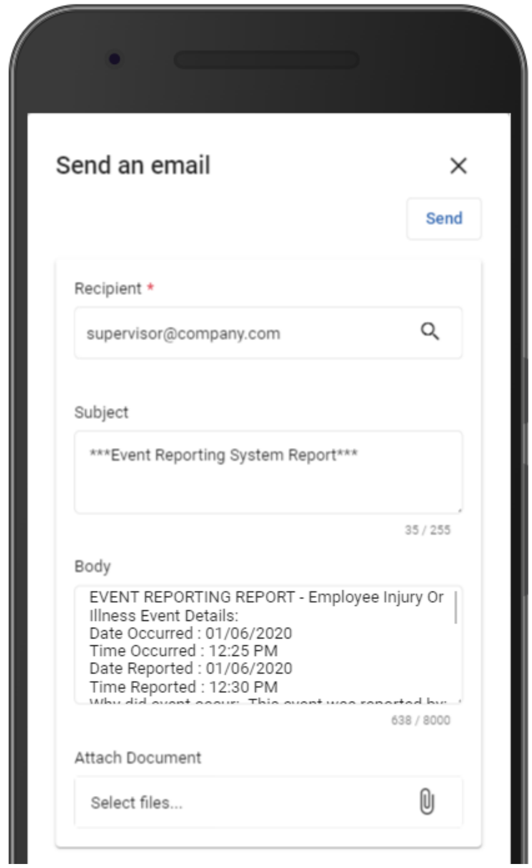
Voice Input

If your device supports voice input, you can use this functionality to populate the fields in your tasks and event reports. See the documentation provided with your device for setup instructions.

Email Updates

Your supervisor can request email updates each time you submit or modify a record. If you have performed an action for which email updates have been requested, the **Send an email** form will display. On the form, the subject and body text will be automatically populated.

Enter the recipient's email address and enter any additional information. Click **Select files…** to attach a file. When you are finished composing the email, click **Send**.



User Settings

Settings are accessed by clicking your photo in the top right of the screen. If a photo is attached to your employee record in the database, that photo will be used in myCority and cannot be changed.

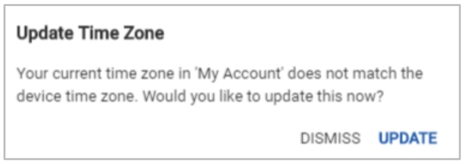
My Account

Click your photo at the top right of the screen and select **My Account**.

Basic

- **Profile Picture:** This is the photo that will display in the top right of all myCority views. If no profile picture is provided, the user's initials will be shown. To add a profile picture:
- **Full Name:** This is the user's first and last time, as it appears in the employee record.
- **User Name:** This is the user's user name, as it appears in the employee record.
- **Current Time Zone:** This setting displays the current time zone for your location. Depending on your account configuration, this setting may display a drop-down list that will allow you to change to a different time zone.

Note: The selected time zone in myCority must match the time zone selected on your device. If the time zones do not match, you will be prompted to update your myCority time zone.



- **Change Password:** Click this button to change your password. The Change Password form will open. Enter your old password in the **Old Password** field and your new password in the **New Password** and **Confirm Password** fields and click **Save**.

  Note: Your password must contain at least three of the following:

  - A lowercase letter (a through z)
  - An uppercase letter (A through Z)
  - A number (0 through 9)
  - A special character (such as !, @, #, $)

Note: Your password must not contain your login ID, and your previous six passwords cannot be reused. Passwords that were created prior to the 2019.2 release will not be impacted by these password requirements; they will only apply to future passwords.

Email and Language

- **Email Address:** This is the email address defined in your employee record in the database. Enter a different email address, if necessary.
- **Language:** This is the language all captions, text, etc. will use in the myCority. Select a different language, if necessary.
- **Offline Verification PIN**: This is the 4 to 6-digit PIN you will be required to enter to access Offline mode.

Address and Phone Number

- **Home Street:** This is the street address defined in your employee record in the database. Enter a different street address, if necessary.
- **Home City:** This is the city defined in your employee record in the database. Enter a different city, if necessary.
- **Home Phone:** This is the home phone number defined in your employee record in the database. Enter a different home phone number, if necessary.
- **Cell Phone:** This is the cell phone number defined in your employee record in the database. Enter a different cell phone number, if necessary.

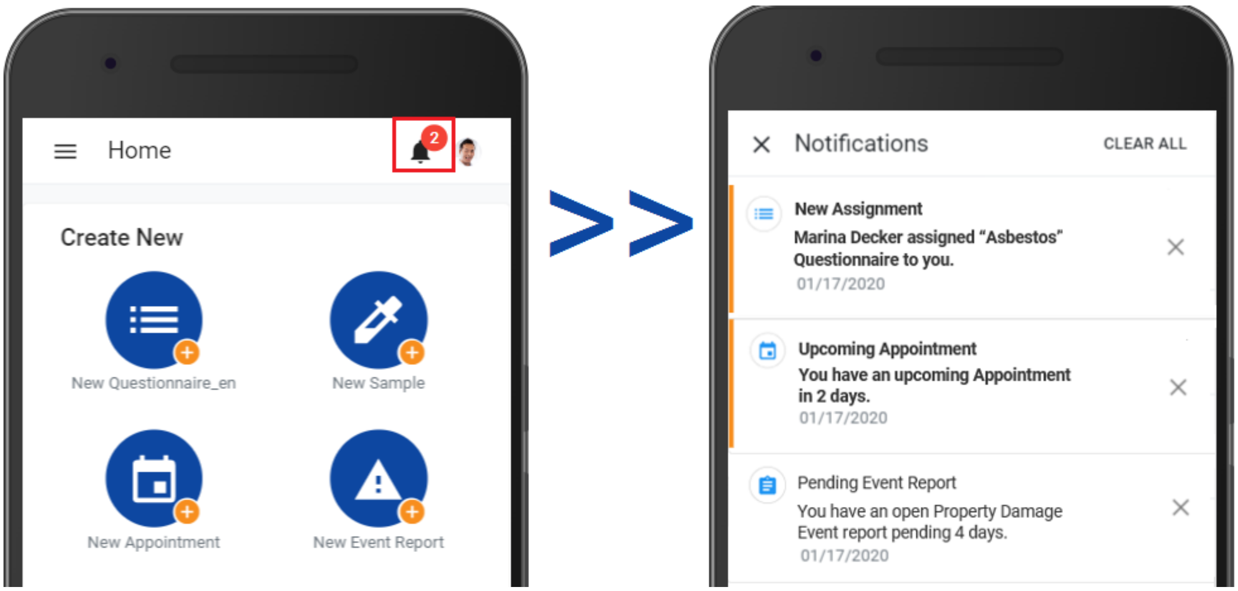
Health Centers

- **Primary Health Center:** This is the primary health center defined in your employee record in the database and cannot be changed. When you create a new conversation, you will be able to choose from users at this health center.
- **Health Center Address:** This is the health center address defined in your employee record in the database and cannot be changed.
- **Health Center Phone Number:** This is the health center phone number defined in your employee record in the database and cannot be changed.
- **Secondary Health Center:** If you need to correspond with practitioners at another location, select a secondary health center from the list. When you create a new conversation, you will be able to choose from users at both your primary and secondary health center.
- **Secondary Health Center Address:** This is the health center address defined in your employee record in the database and cannot be changed.
- **Secondary Health Center Phone Number:** This is the health center phone number defined in your employee record in the database and cannot be changed.
- **Use Secondary Health Center:** When enabled, you will be able to schedule appointments at your selected secondary health Center; you will not be able to schedule appointments at your primary health center.

Notifications

The **Notifications** list in myCority displays recent communications from your supervisor or administrator, such as new assignments, upcoming appointments, or pending event reports.

To access your notifications, click or tap the Bell icon at the top right of the screen.

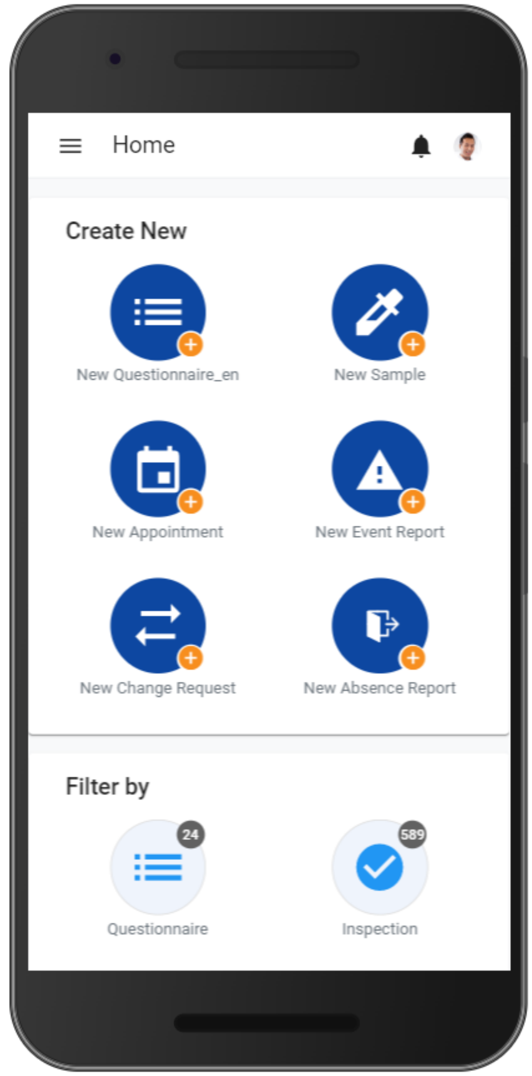


Unread notifications will display in bold text. Click or tap **View** to mark the notification as 'read'. If you click **Dismiss**, the notification will be deleted from the list. If you click **Clear All**, all of your notifications will be deleted. Click **Load More** to see additional notifications.

If the notification is not linked to a record, the **View** button will not display. Click View to open the record, or **X** to close the **Notifications** list.

Home

Home is displayed after you log in to myCority. This is the launch point for all of your myCority tasks and activities.



The **Home** view is divided into two sections: **Create New** and **Filter by**. The **Create New** section has the following four icons for creating new records:

- New Questionnaire
- New Sample
- New Appointment
- New Event Report
- New Change Request
- New Absence Report

For instructions on how to create a new questionnaire, sample, appointment, change request, or absence report see My Tasks. For instructions on how to create a new event report, see Creating a New Event Report.

The **Filter by** section of the **Home** view displays icons for accessing your assigned tasks. A description of each task type is below:

- **Questionnaires** displays any questionnaires that have been assigned to you to complete. For medical questionnaires, the Started On date will remain blank until you start working on it.
- **Inspections** records can come from the Safety, Environmental, or Ergonomics suites. Click and inspection to open it. If a question has an image attached to it, it will display in an enlarged form.
- **Surveys** displays any surveys that have been assigned to you to complete.
- **Metrics** displays individual metrics that have been assigned to you to complete.
- **Actions** displays actions that are assigned to you to complete.
- **Campaigns** displays campaign metrics that have been assigned to you to complete.
- **Investigations** displays incident investigations where you are one of the investigators.
- **Appointments** displays your scheduled medical appointments.
- **Samples** displays any samples that have been assigned to you to complete.
- **Observations** displays any observations that have been assigned to you to complete.
- **My Dashboards** displays the dashboards that have been shared with you.
- **Event Reports** displays any event reports that have been assigned to you to complete.

- **My Records** displays your medical records.
- **Scan Code** allows you to scan or search for a code to locate an environmental asset.
- **Offline** displays any records that were created offline and have not yet been submitted.

The gray number indicator on an icon displays the number of incomplete records for that task type. For the Offline icon, the grey number indicator displays the number of records that were created offline and have not yet been submitted.

If you click an icon, you will be directed to the **My Tasks** view (or the **Event Reports** view, if you click the Event Reports icon). The view will be filtered according to your selection.

My Dashboards

My Dashboards displays charts indicators that allow you to monitor your performance and tasks. Dashboards are created and managed in the main Cority application and can then be shared with the myCority role.

To share a dashboard with myCority users:

1. In the main Cority application, open the dashboard you want to share.
2. Select **More** > **Properties**. The Dashboard Properties dialog box will open.
3. In the Shared With myCority Roles section, click **Add Selected Roles**.
4. Select the **myCority** role.
5. Click **Save**.

Note: To add a role to the **Dashboard Properties** dialog box, your role musts be granted the 'role.list' and 'role.picklist' security actions, and the 'AdvancedUserDashboardView.Shared with Roles' view.

Dashboard Security

Dashboard security is managed through the **Site Security** module in the main Cority application. The process for configuring site security is different depending on if your organization uses both myCority and Portal or only myCority.

If you use both myCority and Portal, site security is configured as follows:

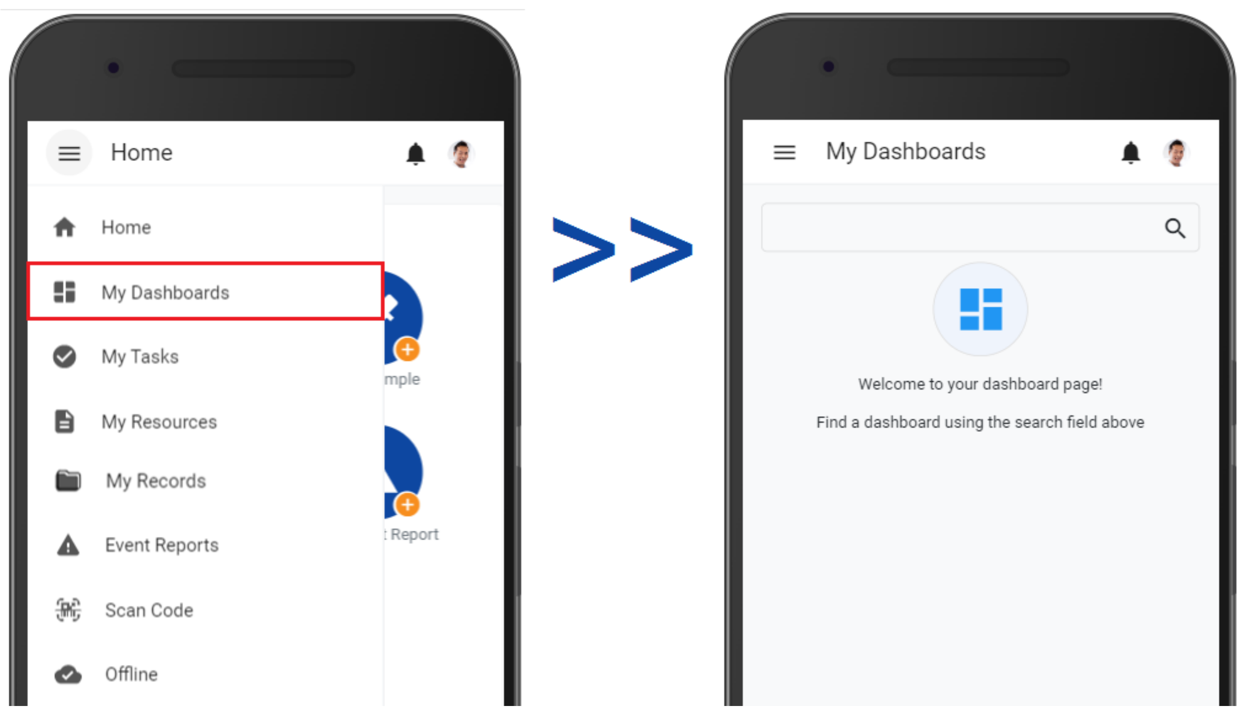
1. Select **Administrator** > **Roles**.
2. Create a new role called 'myCority'.
3. In the Granted Roles tab, add the **Portal** role.
4. Click **Save**.
5. Grant the new role to each user who will have access to myCority.

If you use myCority only, site security is configured as follows:

1. Select **Administrator** > **Site Security**.
2. Select the Portal role.
3. Remove the root node from each GDDLOFB.
4. Click **Save**.
5. Select **Administrator** > **Roles**.
6. For each user who will have access to myCority, open the user layout and add the Portal role to the Granted Roles tab.
7. Click **Save**.

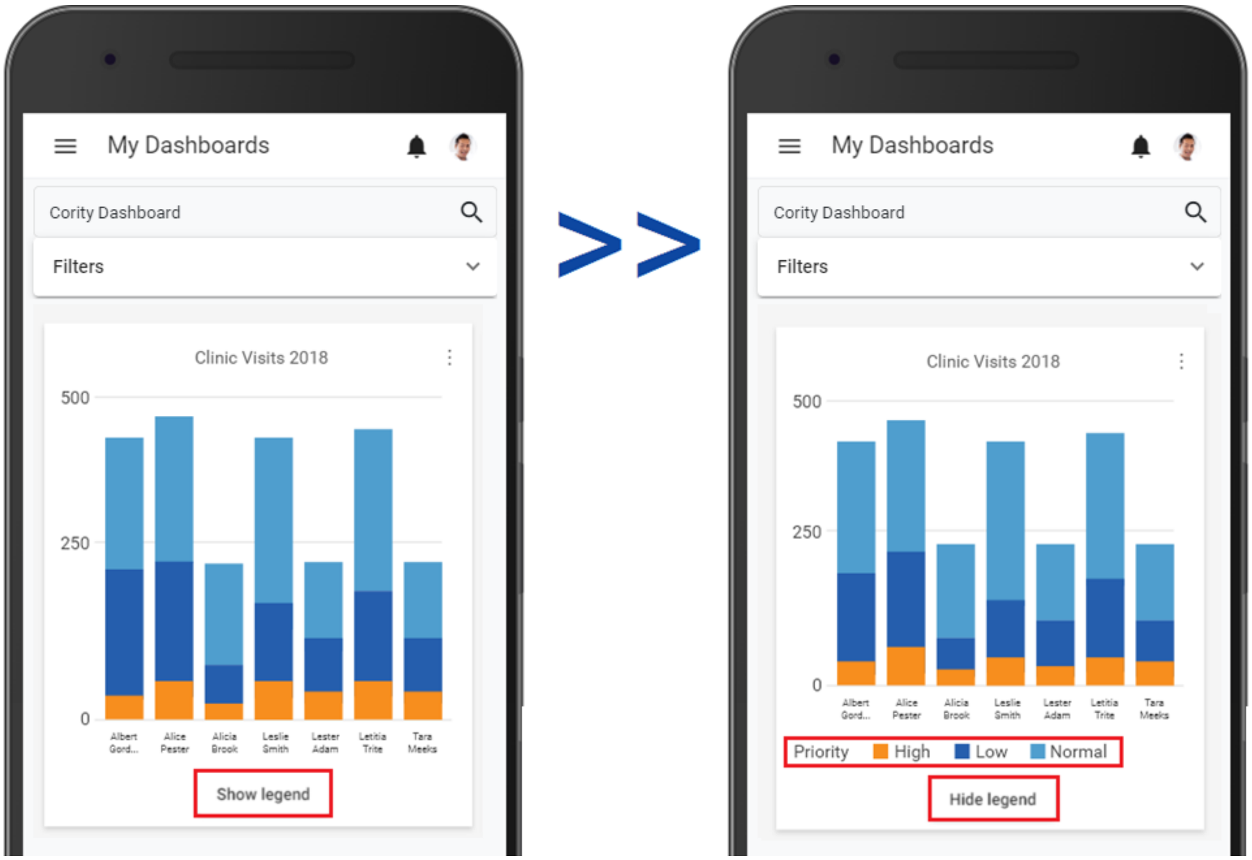
Accessing Your Dashboards

To access the **My Dashboards** view, select **My Dashboards** from the side menu or from the Home view. The first time you access **My Dashboards**, you will be presented with a welcome message that will instruct you to select a dashboard.



Click the Magnifying Glass icon to search for a dashboard. You will be presented with a list of dashboards that have been granted to your role. Select a dashboard to view it.

Each of the indicators on a dashboard (except for the number only, table, and map type indicators) will have a **Show legend / Hide legend** at the bottom. If you click **Show legend**, the indicator will refresh and display a legend. If you click **Hide legend**, the legend will be hidden again.



If you are using a desktop or laptop computer, click the Full Screen icon at the top right of an indicator to view it in full screen mode. If you are using a tablet or mobile device, simply tap an indicator to view it in full screen.

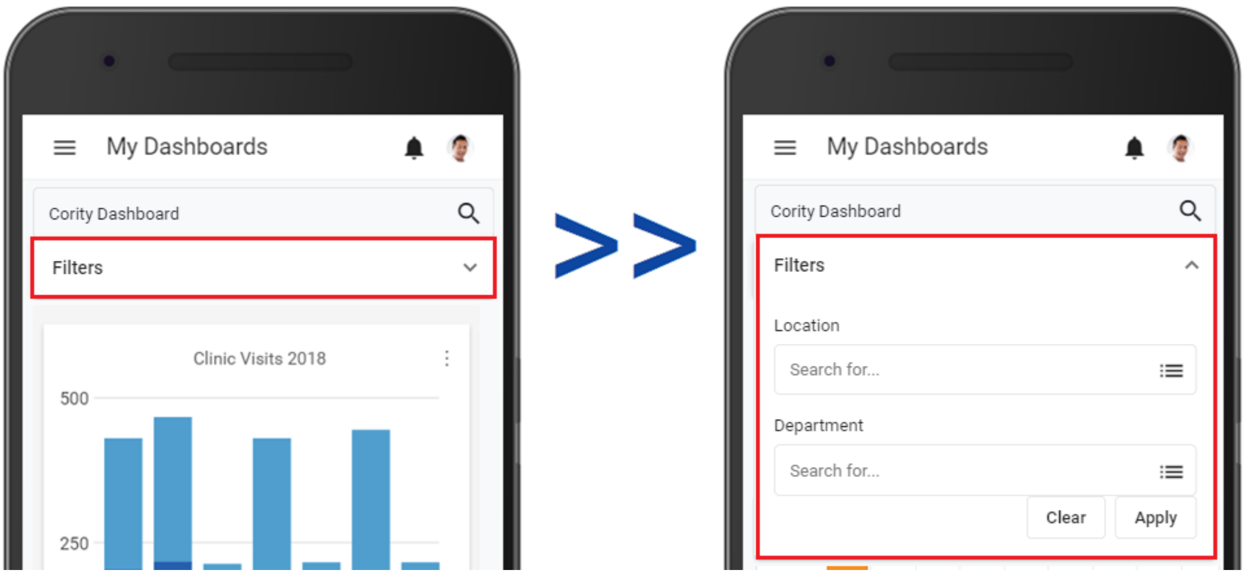
To exit full screen mode, click **X** at the top right.

Each time you access **My Dashboards**, the view will display the dashboard you last accessed.

Filtering Your Dashboards

If a dashboard contains location-specific data, a **Filters** section will display at the top of the view. Click the section to expand it. The **Filters** section will display a field for each available GDDLOFB dimension.

Select the desired location(s) and click **Apply**. The dashboard will be filtered accordingly.

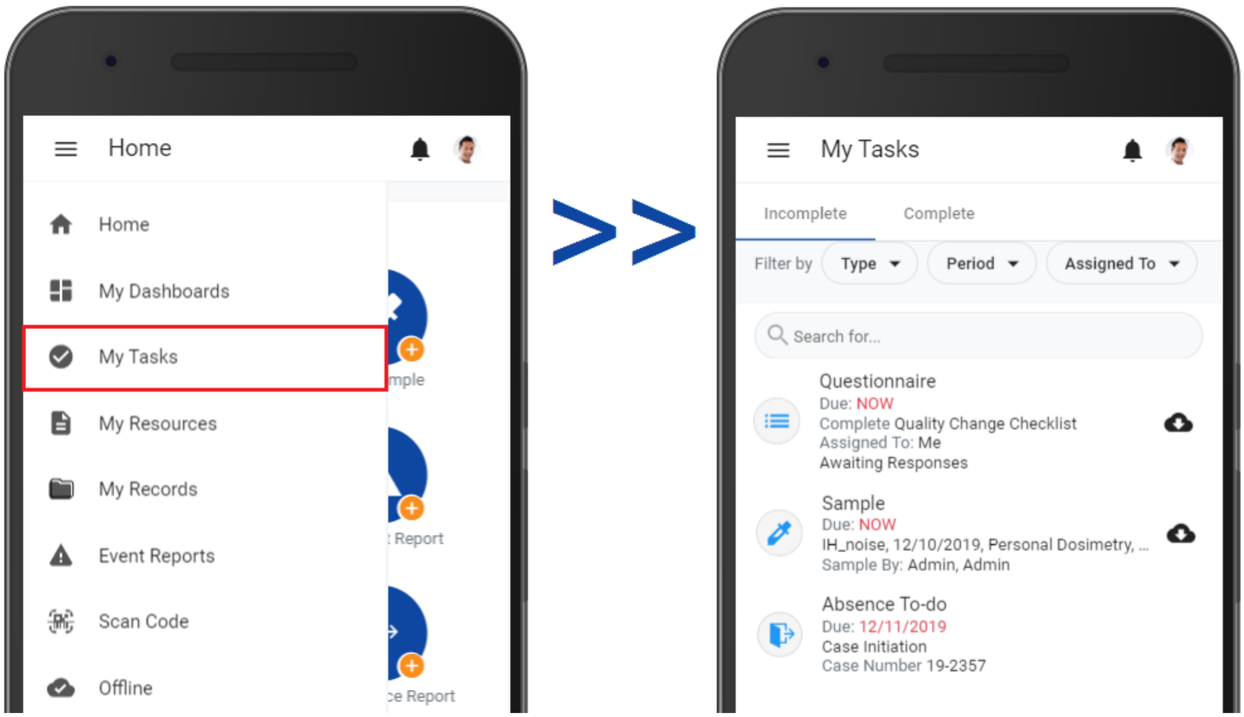


To remove the filter(s), expand the **Filters** section and click **Clear**.

My Tasks

My Tasks displays items that you have created or that have been assigned to you to complete. From the **My Tasks** view, you can select and complete in-progress tasks, or create a new change request, questionnaire, appointment, absence request, or sample record. The view will also display campaign metrics that have been assigned to your group or team.

To access this view, click the side menu button and select **My Tasks**. The **My Tasks** view will open.



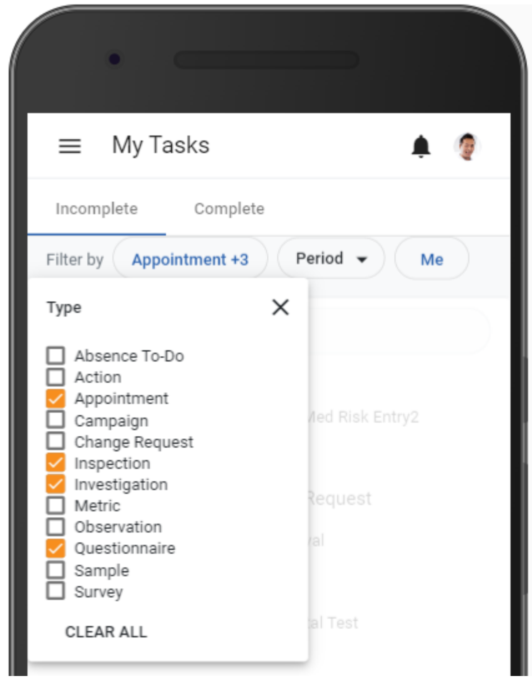
The **My Tasks** view will list overdue items first, then items that are due now or that do not have a due date, followed by items with upcoming due dates. Tasks will be displayed in chronological order.

Items in the **My Tasks** view are organized in tabs according to their **Incomplete** or **Complete** status. Records in the **Incomplete** and **Complete** tabs can be filtered by **Type**, **Period**, and/or **Assigned To**.

The **My Tasks** view has a **Create New** button that lets you create a new appointment, questionnaire, or sample.

If you are assigned a group or team action, the **Findings & Actions** layout will include **Assigned to Group**, **Complete as Team**, and **GDDLOFB** fields. Any member of the group or team will be able to complete the action. If you are a Supervisor, group or team actions will not display in your **My Tasks** view.

Filtering Your Tasks



The **My Tasks** view provides three filters: **Type**, **Period**, and **Assigned To**. The filters are located at the top of the **Incomplete** and **Complete** tabs.

To filter your assigned tasks, click **Filters** at the top of the **Incomplete** or **Complete** sections. A list of available filters will open. Select your desired filter(s) and click **Apply**.

If you are a Supervisor, the **Assigned To** filter will list the employees who are assigned to you. If you select one or more employees from the **Assigned To** filter, the **My Tasks** view will display tasks that are assigned to the selected employee(s). If you are not a Supervisor, the **Assigned To** filter will only show the **Me** option.

Note: If you select the **Appointment** filter, both your scheduled medical appointments and surveillance activities will display.

Note: For surveillance activities, when the **Period** filter is blank (or null), all due activities will be displayed in the **Incomplete** section.

Creating a New Change Request

The **Change Requests** feature allows you to create, submit, and track Safety and Environmental change request.

Once you have submitted a change request, it will display in the Safety or Environmental **Change Request** module in the Cority platform where it will be approved or rejected according to your configured approval sequence.

To create a new change request:

1. Select **My Tasks** from the side menu.
2. Click **Create New.**
3. Click **New Change Request**.
4. Select a change request type from the **Select Change Request Type** list.
5. Complete the change request to the best of your ability, ensuring you provide a value for all required fields.

Appointments

The **Appointments** feature allows you to schedule yourself for clinic activities, and to view your preassigned surveillance activities. Your scheduled clinic and surveillance activities will display in the **My Tasks** view. Use the **Appointment** filter to only view your scheduled activities.

Once you have booked an appointment, it will display in the **Appointments** module in the Cority platform.

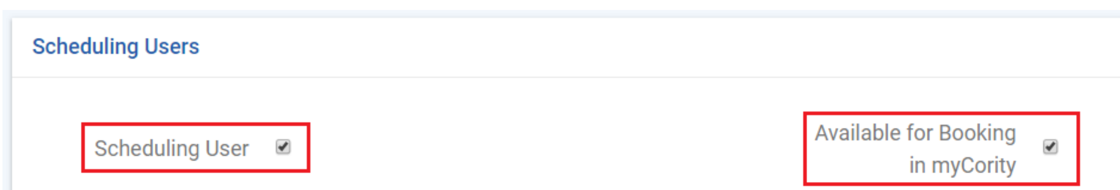
Note: If the **Appointments** module is disabled, the **Create New** button will not display the **New Appointment** option.

Configuring Scheduling Availability

There are two check boxes in the User profile for configuring a user's scheduling availability: **Scheduling User** and **Available for Booking in myCority**.

When the **Scheduling User** check box is selected, appointments can be assigned to that user. When **Available for Booking in myCority** is selected, appointments that were created through myCority can be assigned to that user. The user can then reassign the appointment to a different scheduling user, if necessary.

Note: The **Available for Booking in myCority** check box will only be available if the **Scheduling User** check box is selected.



When a myCority user creates a new appointment entry, it will be randomly assigned to a scheduling user who is associated with the selected health center, and who has the **Available for Booking in myCority** check box selected in the User profile. If there are no scheduling users for whom this setting is selected, the appointment will be assigned to the first scheduling user in the Users list.

The available times can be configured in the Cority platform. To do this, select **Occupational Health** > **Appointments** > **Filters**, and select the health center. Then select the **Settings** tab and make the necessary changes.

By default, time slots will be thirty minutes in length. To change the time slot duration, open the **Schedule Activity Codes** look-up table in the Cority platform, select an activity, and change the duration.

When a myCority user creates a new appointment entry, the **Appointment Details** form will display a list of available time slots. If a time slot is already taken, it will not display in the **Appointment Details** form. If the user is booking an appointment for today, the first time slot, if available, will be the current time rounded up to the nearest five minutes.

If no scheduling availability has been configured for a user, all timeslots will be available in the **Appointment Details** form.

Creating a New Appointment

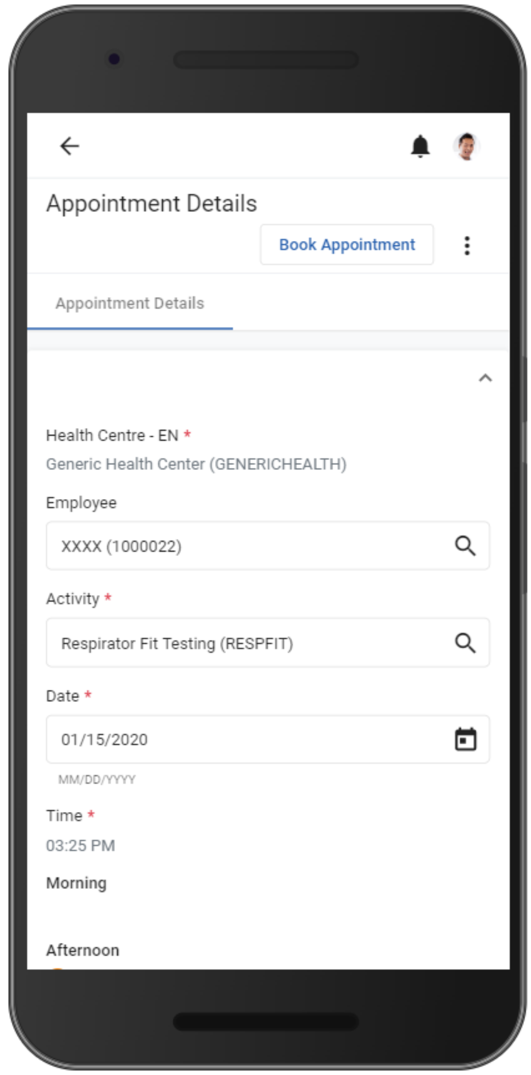
1. Select **My Tasks** from the side menu.
2. Click the **Create New** button.
3. Click **New Appointment**. The **Appointment Details** form will display.

   Note: You can also create a new appointment by clicking the New Appointment icon on the **Home** screen, and then continuing with the steps below.

4. In the **Appointment Details** form, the **Health Center** field will display the Primary Health Center defined in **My Account** (see [My Account](#)). The **Employee** field will display your name. If you are a supervisor, the **Employee** field will be a picklist, from which you can select one of your assigned employees.

   Note: If only a secondary health center is defined in **My Account**, it will display in the **Appointment Details** form. If neither a primary or secondary health center have been defined, the **Health Center** field in the **Appointment Details** form will be a drop-down menu, allowing you to select a health center.

   If you are a supervisor booking an appointment on behalf of an employee, the **Employee** field will be a picklist. The picklist will display a list of users who are assigned to you. Select a user from the list to book him or her for an appointment.



5. Complete the **Appointment Details** form to the best of your ability, ensuring you select an activity, date, and time for the appointment.

   Note: The **Activity** picklist will only display those activities that have the **Portal Activity** check box selected, are associated with the selected health center, and that have the **Schedule and Exam Activity** or **Exam Activity Only** type.

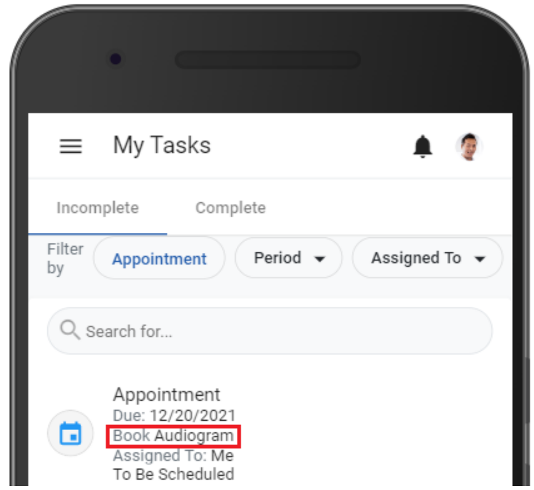
6. When you are finished, click **Book Appointment**. An 'Appointment Booked' message will display.
7. The Appointment Details form will close, and you will be directed back to the My Tasks view. The appointment will display in the **Incomplete** list. It will be named **Attend [activity]** and will have a status of **Scheduled for [date and time]**. If you are a supervisor who has booked an appointment on behalf of an employee, the appointment will display in your **Incomplete** list.

   Note: If you are using a mobile device, the status of your appointments will not display.

Once the appointment has been marked as 'Complete' in the Cority platform, the appointment entry will display in the **Complete** section of **My Tasks**.

Booking a Surveillance Activity

When a surveillance activity is assigned to you, it will display in the Incomplete list in **My Tasks**. The activity will be named 'Book [surveillance activity]', will have a status of 'To Be Scheduled', and a due date will be displayed. For activities that are due today or that are overdue, the due date will display as 'NOW' in red text. Note that your assigned surveillance activities are only visible to you; they cannot be viewed by a supervisor.



When you book yourself for a surveillance activity, the appointment will include all related recall activities.

To book yourself for a surveillance activity:

1. Select **My Tasks** from the side menu.
2. Select the surveillance activity from the **Incomplete** list. The **Appointment Details** form will display.
3. In the **Appointment Details** form, the **Health Center** field will display the Primary Health Center defined in **My Account** (see My Account), the **Employee** field will display your name, and the Activity field will display the surveillance activity. Each of these fields will be read-only.
4. Select a date and time for the appointment.
5. Click **Book Appointment**. A message will display asking if you are sure you want to book the appointment. Select **Yes**. An 'Appointment Booked' message will display.
6. The **Appointment Details** form will close, and you will be directed back to the **My Tasks** view. The appointment will display in the Incomplete list. It will be named 'Attend [surveillance activity]' and will have a status of 'Scheduled On [date and time]'.

   Once the activity has been marked as 'Complete' in the Cority platform, the appointment entry will display in the **Complete** section of **My Tasks**.

   Important: Your scheduled surveillance activities cannot be edited. If you need to make changes to an activity, contact an administrator.

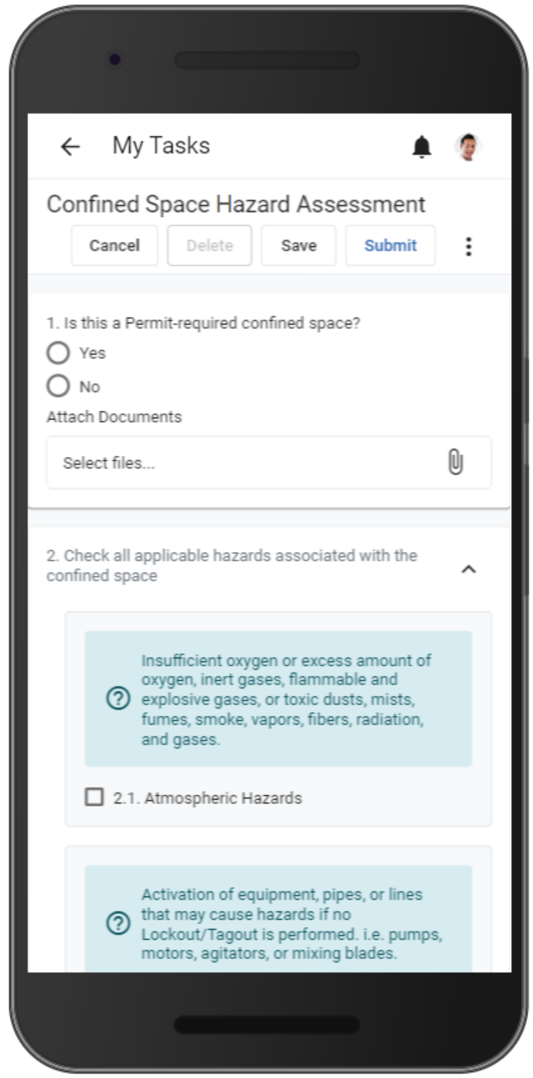
Modifying an Appointment

1. Select an appointment from the **Incomplete** list. The appointment will open.
2. Click **Update Appointment**. In the appointment form, the **Date**, **Time**, and **Notes** fields will become editable.
3. Make the necessary changes.
4. Click **Save**. An 'Appointment Updated' message will display.

Cancelling an Appointment

1. Select an appointment from the **Incomplete** list. The appointment will open.
2. Click **Cancel Appointment**.
3. An 'Are you sure you want to cancel this appointment?' message will display. Select **Yes**. The appointment will be cancelled and will no longer display the **My Tasks** view.

Creating a New Questionnaire



1. Select **My Tasks** from the side menu.
2. Click the **Create New** button.
3. Click **New Questionnaire**.

   Note: You can also create a new questionnaire by clicking the **New Questionnaire** icon on the Home screen, and then continuing with the steps below.
4. Select a questionnaire from the **Select a Questionnaire** list.

   Note: The **Select a Questionnaire** list displays questionnaire templates that have the **Public Questionnaire** check box selected and the **Questionnaire Inbox** field populated in **Questionnaire** look-up table.
5. Complete the questionnaire to the best of your ability, ensuring you provide a response for all required fields.

   Some questions in the questionnaire may accept a drawn response, either over an image or in a blank field. If this is the case, a **Clear** button will display below the question, allowing you to clear your drawn response. You can provide a drawn response using your cursor, or if you are using a tablet or mobile device, using your finger or a stylus.
6. When you are finished, click **Submit**. To save the questionnaire and complete it later, click **Save**. If you save the questionnaire, it will display in the Incomplete list in the main **My Tasks** view.

Creating a New Sample

1. Select **My Tasks** from the side menu.
2. Click **Create New.**
3. Click **New Sample**.

   Note: You can also create a new sample by clicking the New Sample icon on the **Home** screen, and then continuing with the steps below.

4. Select a sample from the **Select a Sample** list.
5. Complete the sample to the best of your ability, ensuring you provide a value for all required fields.
6. When you are finished, click **Submit**. To save the sample and complete it later, click **Save**. If you save the sample, it will display in the Incomplete list in the main **My Tasks** view.

   Note: The **Select a Sample** list displays sample templates that have a Portal layout configured in the corresponding **Sample Type** look-up table.

Creating a New Absence Request

Note: This functionality is only available for the LDAP and SSO authentication methods.

1. Select **My Tasks** from the side menu.
2. Click Create New.
3. Click New Absence Request.

   Note: You can also create a new absence request by clicking the New Absence Request icon on the **Home** screen, and then continuing with the steps below.

4. Complete the absence request to the best of your ability, ensuring you provide a response for all required fields.

   Note: If you assign a case type to the absence request, and the case type has one or more linked to-do activities, those activities will display in the **To-Do** tab on the absence request. Depending on how the administrator has configured myCority, the same activities may also display in your **My Tasks** view.

5. When you are finished, click **Submit**. The absence request will display in your **My Records** view.

   Note: Once you submit an absence request, it will be reviewed by a Cority platform user. If the Cority user posts the absence request to a Case record, it cannot be cancelled or modified from within myCority. You will still be able to upload new documents and complete your assigned to-do activities for the request.

Modifying a Task

1. Select a task from the **Incomplete** list. The questionnaire will open.
2. Make the necessary changes.
3. Click **Save** to save the task, or **Submit** to submit it.

Deleting an in-Progress Task

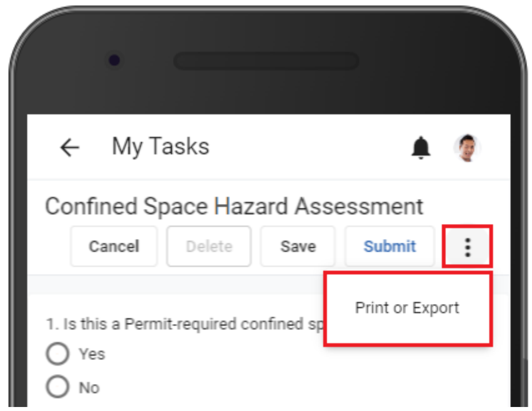
Note: You can only delete tasks that you have created.

1. Select a task from the **Incomplete** list. The task will open.
2. Click **Delete**.
3. An 'Are you sure you want to delete this record?' message will display. Select **Yes**. The task will be deleted and will no longer display the **My Tasks** view.

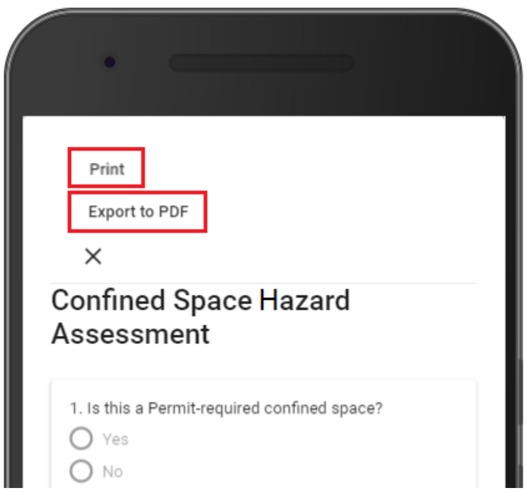
Completing an in-Progress Task

1. Select a task from the **Incomplete** list. The task will open.
2. Complete the task to the best of your ability, ensuring you provide a value for all required fields.
3. When you are finished, click **Submit**. The task will move from the **Incomplete** list to the **Complete** list.

Printing or Exporting a Task



1. Select a task from the **My Tasks** view.
2. Click the vertical ellipsis at the top right.
3. Click **Print or Export**. A read-only view of the task will display. The view will have **Print**, **Export to PDF**, and **Back to previous view** buttons.
4. To print the task, click **Print**. If your device is connected to a printer, a **Print** dialog will display. Select your desired printer settings and click **Print**.



To export the task to PDF format, click **Export to PDF**. A PDF copy of the task will download to your device.

5. Click **X** to return to the task.

Incident Workflow

If you have employees assigned to you, you may be required to approve incident investigations that are attached to your employees' submitted tasks. When an assigned employee submits a task that requires your approval, the incident investigation will display in your **Incomplete** list.

If an incident was posted from an event report, the **Category** field in the incident will display the **Primary Category** value from the originating event report.

Incident investigations must be approved by each employee in the investigation approval hierarchy. The investigation approval hierarchy will typically include a Supervisor, Manager, General Manager, and EHS Manager, but can be customized according to your organization's requirements.

If an incident investigation is rejected, it will return to the previous employee's **My Tasks** view so it can be modified and resubmitted.

It is recommended that you add the Portal role to the incident layout that is linked to your primary incident category, and that you remove the Portal role from the investigator layout. This will ensure that incident records will open in the layout that corresponds with their respective incident category.

Supervisor

If you are a supervisor, you are responsible for collecting and entering the data in the initial investigation. When you are ready to submit an investigation, click **Mark Investigation Complete**. In the **My Tasks** view, the investigation will move from the **In Progress** list to the **Completed** list.

Manager

If you are a manager with one or more supervisors assigned to you, their submitted incident investigations will display in your **My Tasks** view for you to approve or reject.

If you select **Manager Approve**, the incident investigation will appear in your **Completed** list and will be added to the **My Tasks** view for the next employee in the approval hierarchy.

If you select **Manager Reject**, the incident investigation will return to the supervisor's **My Task** view so it can be modified and resubmitted.

General Manager

If you are a general manager with one or more managers assigned to you, the incident investigations they have approved will display in your **My Tasks** view for you to approve or reject.

If you select **Gen Mgr Approve**, the incident investigation will appear in your **Completed** list and will be added to the **My Tasks** view for the next employee in the approval hierarchy.

If you select **Gen Mgr Reject**, the incident investigation will return to the manager's **My Tasks** view so it can be modified and resubmitted.

EHS Manager

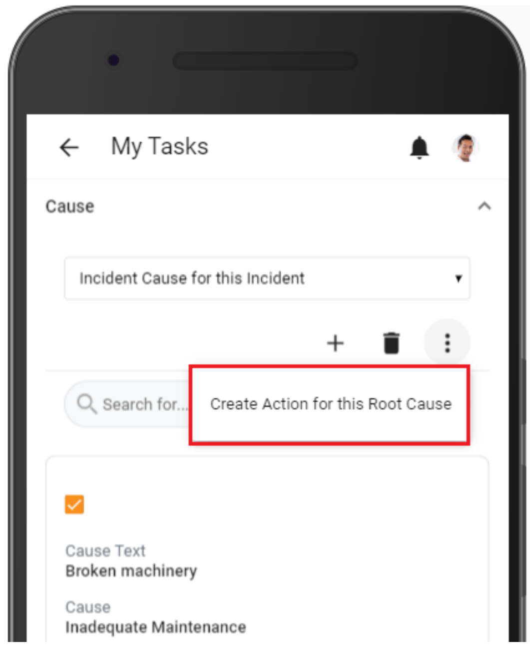
If you are an EHS manager with one or more general managers assigned to you, the incident investigations they have approved will display in your **My Tasks** view for you to approve or reject.

If you select **EHS Approve**, the incident investigation will appear in your **Completed** list. If you select **EHS Reject**, the incident investigation will return to the general manager's **My Tasks** view so it can be modified and resubmitted.

Creating an Action for a Root Cause

If you are completing an investigation for which a root cause has been identified, you may wish to link an action to that root cause. To create an action:

1. Select an investigation from the **My Tasks** view.
2. Select the **Root Cause Analysis** tab.
3. Select the cause for which you want to assign an action.
4. Click the vertical ellipsis at the top right.
5. Select **Create Action for this Root Cause**. The **Finding (w/ Risk) & Actions** screen will display.
6. Complete the **Finding (w/ Risk) & Actions** record to the best of your ability, ensuring you provide a value for all required fields.
7. When you are finished, click **Save**.



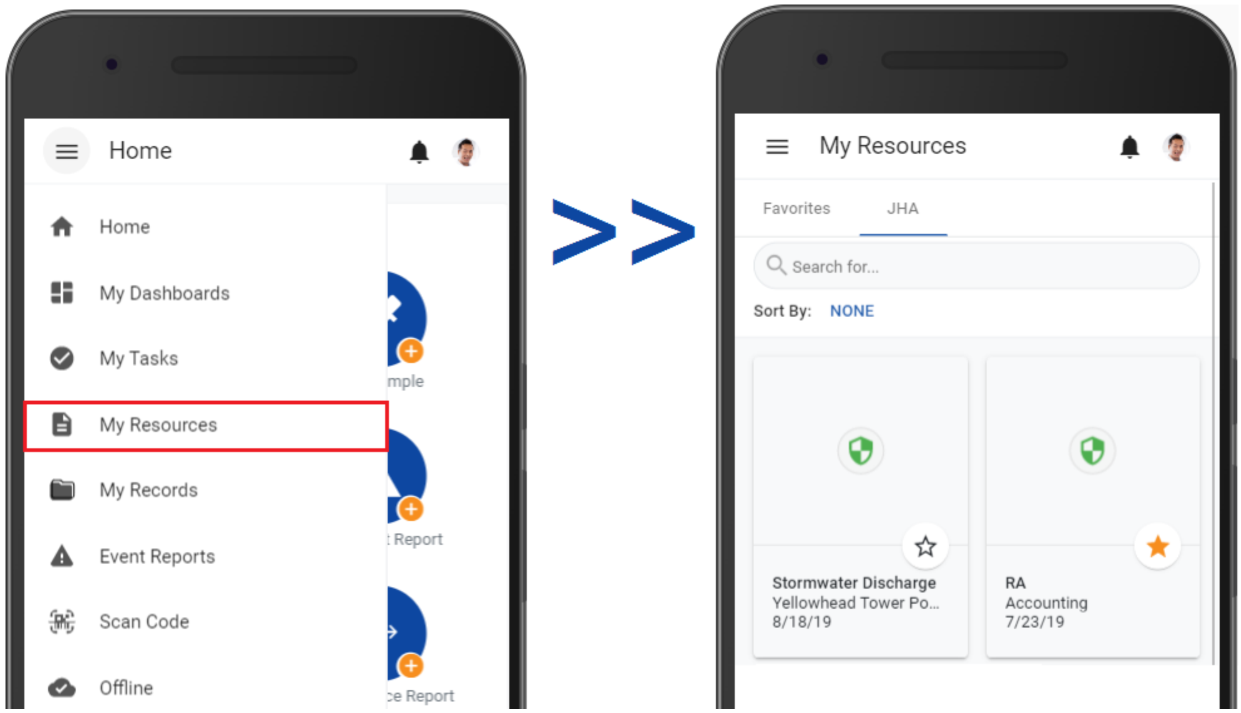
Adding an Action to a Finding

If an investigation contains related findings and actions, you can create a new action and link it to an existing finding. You can create this link from the **Findings & Actions** list view or from within a **Finding & Actions** record.

1. On the investigation, navigate to the **Findings & Actions** tab.
2. Select or open the finding(s) you want to create an action for.
3. Click the vertical ellipsis at the top right.
4. Select **Add New Action To Finding**. A message will display indicating that a new action was created.

My Resources

The **My Resources** module provides an overview of your current job hazard assessments. To access the module, click the side menu and select **My Resources**. The **My Resource** view will open.

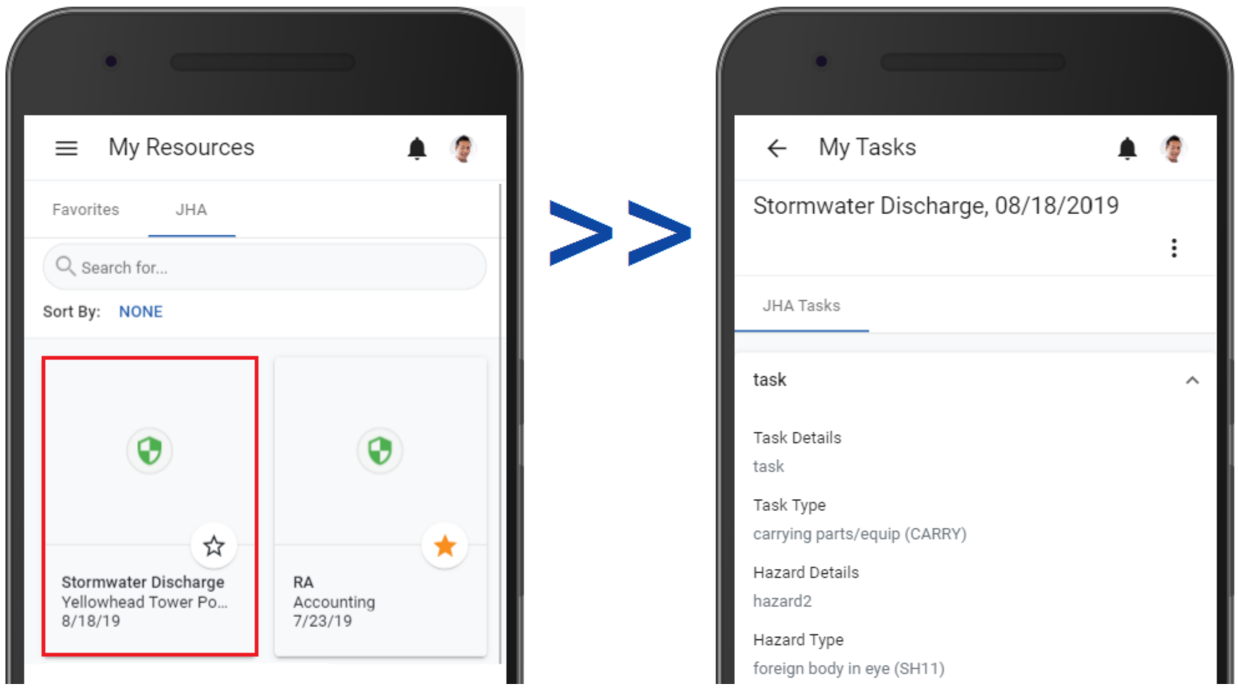


The **My Resources** view has two tabs: **myCority Favorites** and **myCority JHA**.

The **Favorites** tab displays the job hazard assessments that you have marked as 'Favorite'.

The **JHA** tab displays your current job hazard assessments. To mark a job hazard assessment as 'Favorite', click the star icon on the indictor. To remove a job hazard assessment from the 'Favorites' tab, simply click the star icon again.

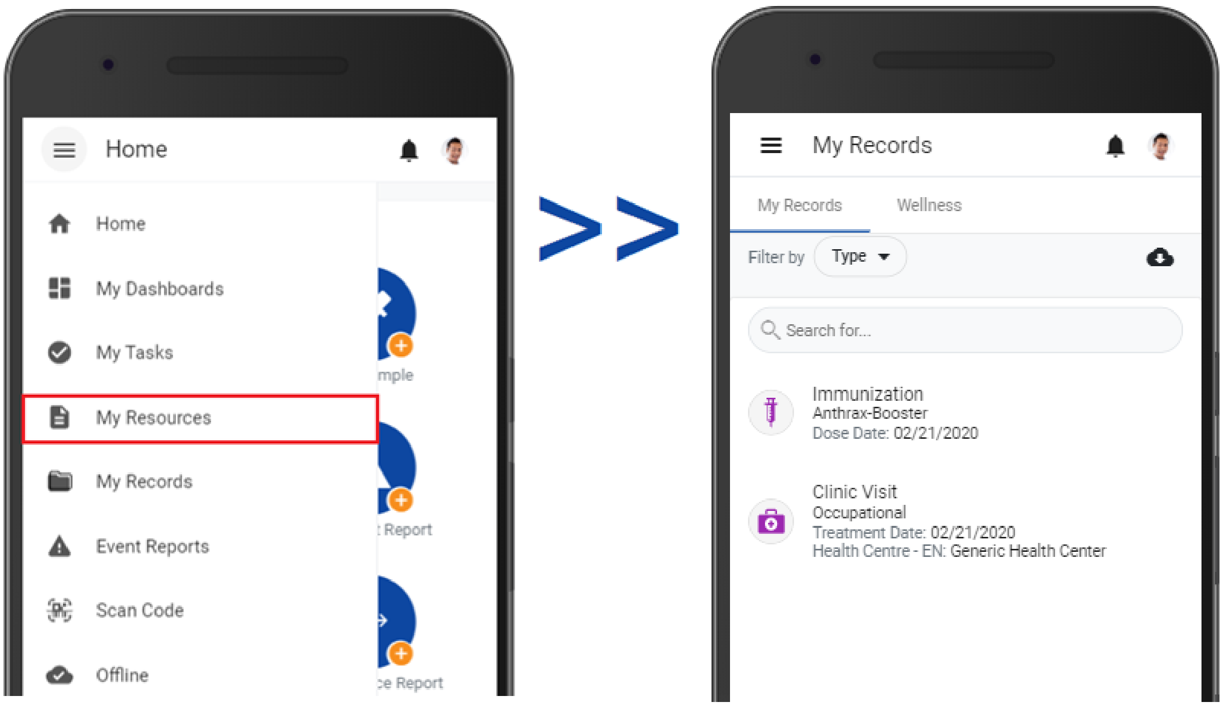
If you click or tap a JHA from either tab, its corresponding record will open in **My Tasks**.



My Records

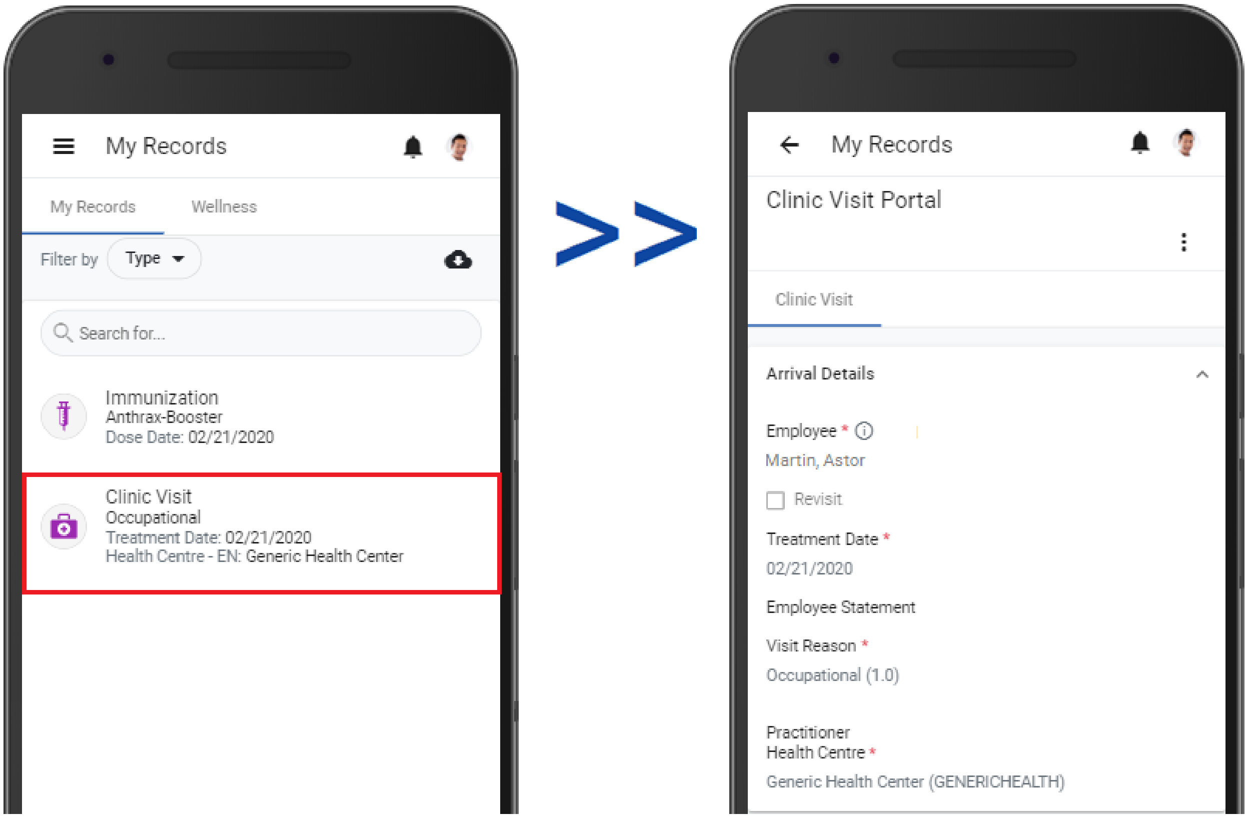
The **My Records** module provides an overview of your medical records within Cority. **Note:** This functionality is only available for the LDAP and SSO authentication methods.

To access the module, click the side menu button and select **My Records**. The **My Records** view will open.

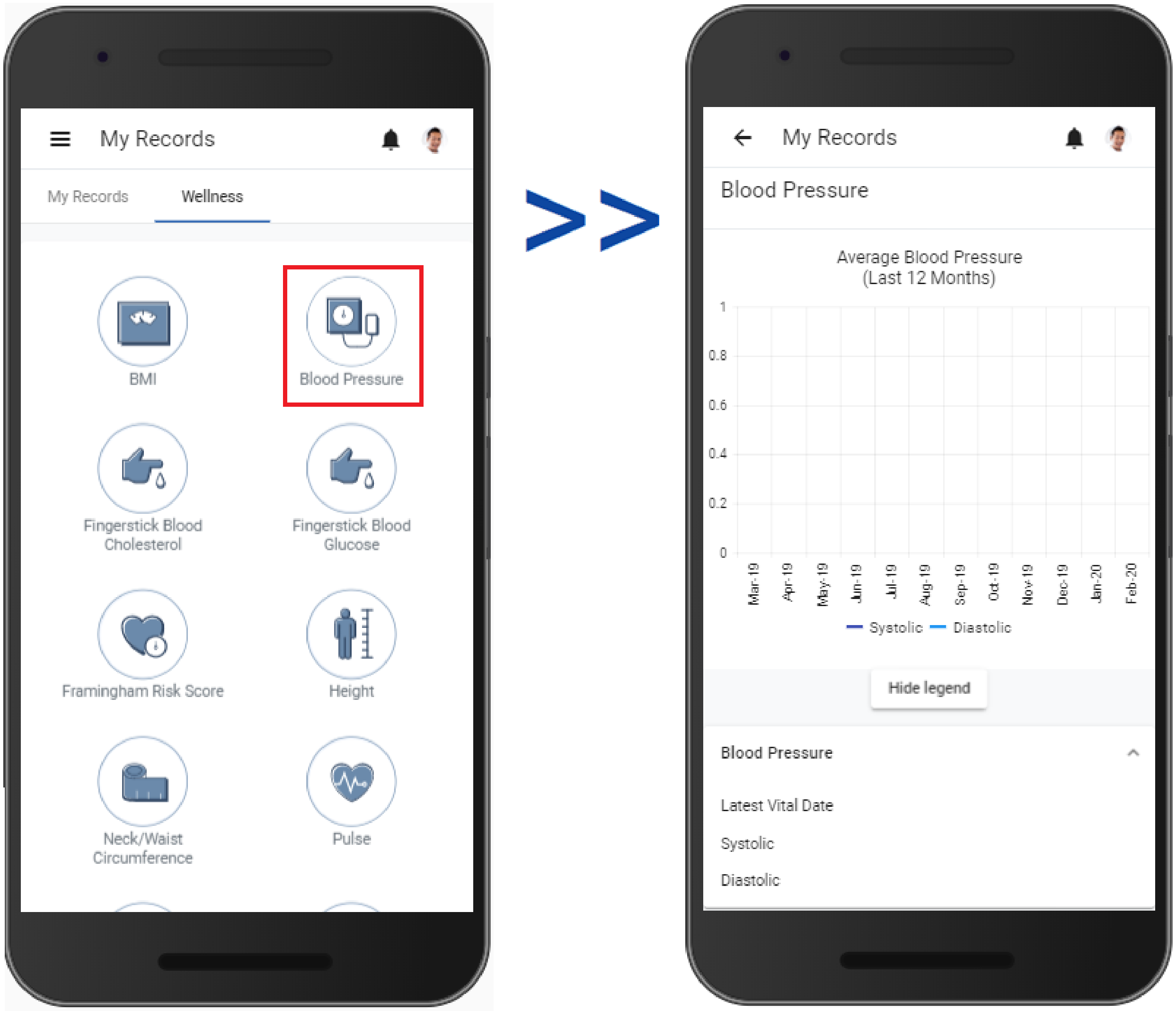


The **My Records** view has two tabs: **My Records** and **Wellness**.

The **My Records** tab displays records of your allergies, managed cases, clinic visits, immunizations, medications, respirator fit tests, and lab results. Click or tap a record to open it.

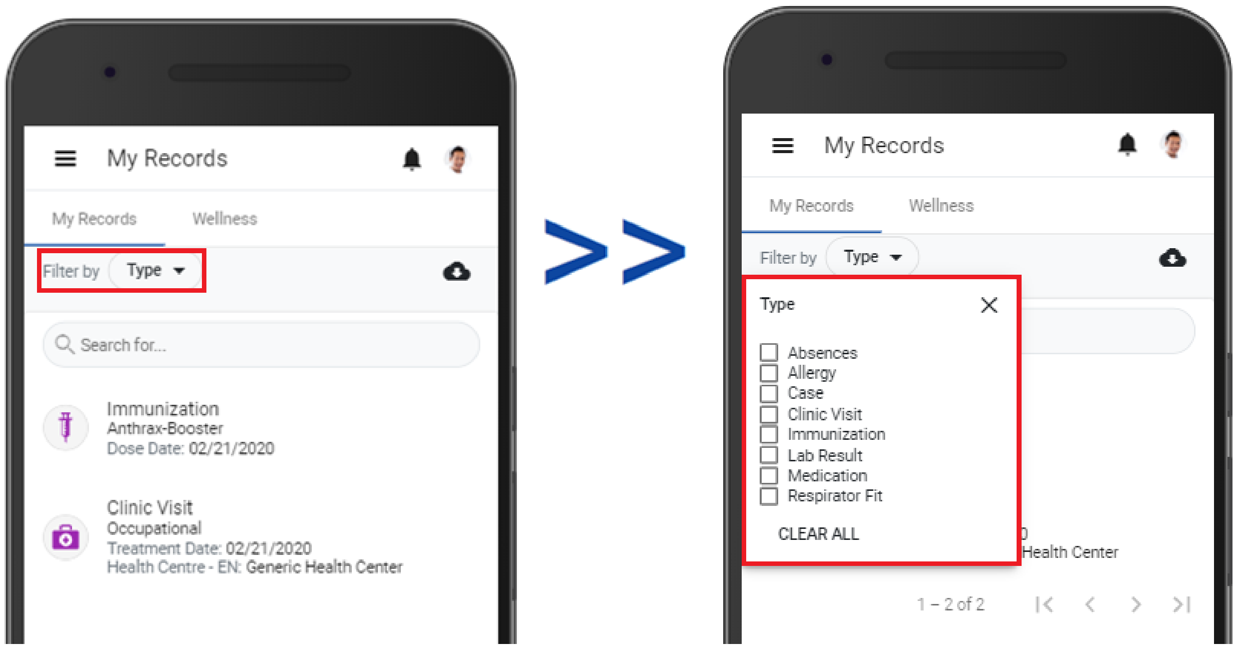


The **Wellness** tab displays the following medical chart indicators: Body Mass Index, Blood Pressure, Fingerstick Blood Cholesterol, Fingerstick Blood Glucose, Framingham Risk Percentage, Framingham Risk Score, Height, Neck Circumference, Pulse, Respiration, SPO2, Temperature, Waist Circumference, and Weight. Click or tap a record to open it.



Filtering Your Records

To further filter your assigned tasks, click **Filter by** at the top of the My Records tab. A list of available filters will open. Select your desired filter(s) and click **Apply**.



Printing or Exporting a Record

1. Select a record from the **My Records** view.
2. Click the vertical ellipsis at the top right.
3. Click **Print or Export**. A read-only view of the record will display. The view will have **Print**, **Export to PDF**, and **Back to previous view** buttons.
4. To print the record, click **Print**. If your device is connected to a printer, a Print dialog will display. Select your desired printer settings and click **Print**.

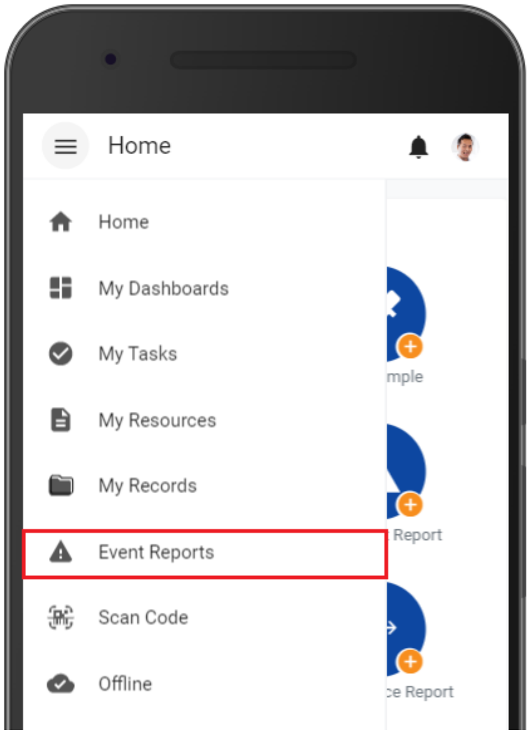
   To export the task to PDF format, click **Export to PDF**. A PDF copy of the record will download to your device.
5. Click **X** to return to the record.

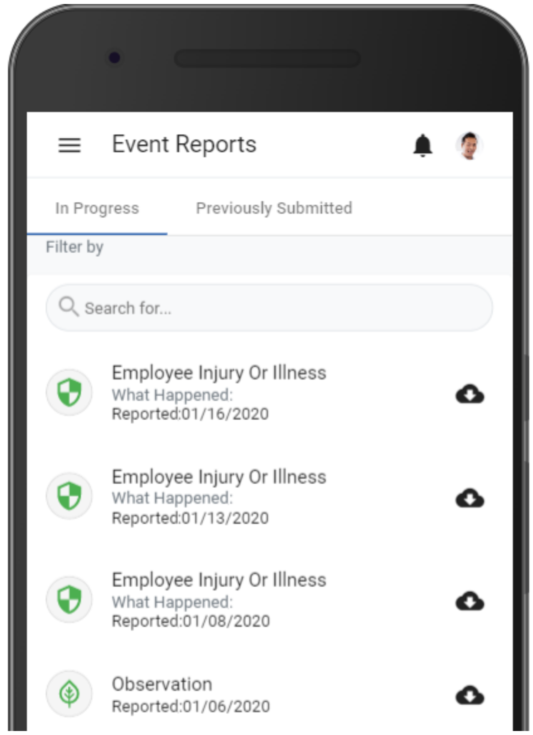
Event Reports

The **Event Reports** view allows you to quickly record and report accidents and events. These may be incidents (with or without related injury or illness), suggestions, or observations. Events may include documents or pictures.

The available Event Report types are defined in the **myCority Event Report Selection** look-up table in the Cority platform. When you create a new Event Report, you will be presented with a list of event report types that have been assigned to your GDDLOFB (Geographic Location, Department, Division, Location, Organization, Facility Type, and Building).

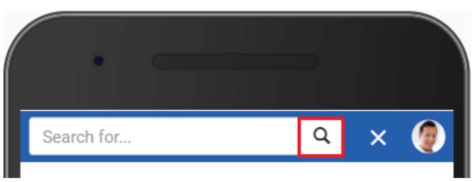
To access the **Event Reports** module, click the side menu button and select **Event Reports**. The **Event Reports** view will open.





Scroll through the **Event Reports** screen to see **In Progress** and **Previously Submitted** records. Use the **Load More** button to see more records.

To search for a record, click the Magnifying Glass. A search field will open.

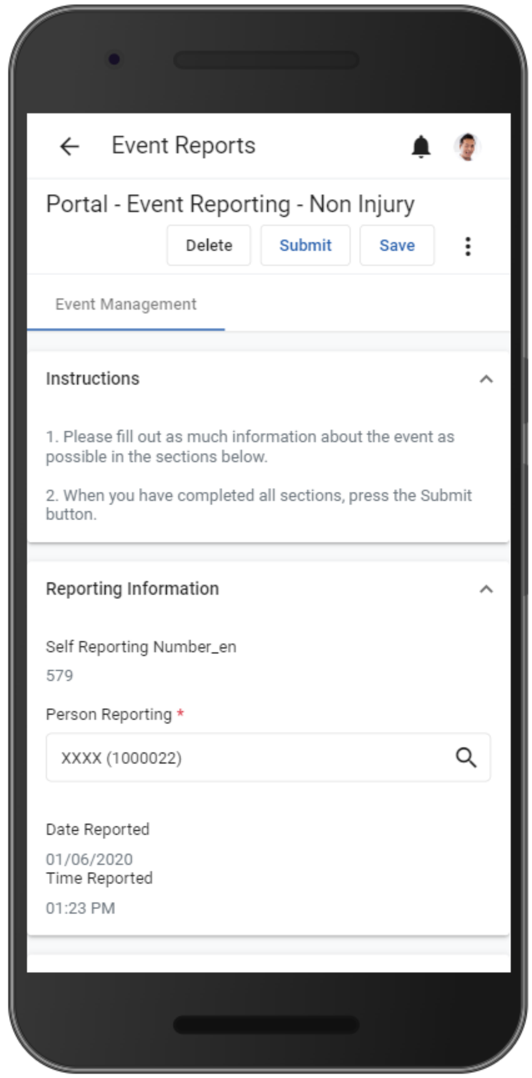


Creating a New Event Report

Note: If an event report includes instructions, they will display at the top of the report template.

1. Select **Event Reports** from the side menu.
2. Click the **Create New** button.
3. Select the type of event you are reporting. **Note:** If there is only one event report type available to your role, you will not be prompted to select an event report type.
4. Complete the fields to the best of your ability, ensuring you provide a value for all required fields.
5. When you are finished, click **Submit**. To save the event report and complete it later, click **Save**. The event report will display in the **In Progress** list.

   Note: Incidents cannot be modified after they are submitted.



Adding an Action to a Finding

If an Event Report contains related findings and actions, you can create a new action and link it to an existing finding. You can create this link from the Findings & Actions list view or from within a Finding & Actions record.

1. From the Event Report, navigate to the **Findings & Actions** tab.
2. Select or open the finding(s) you want to create an action for.
3. Click the vertical ellipsis at the top right.
4. Select **Add New Action To Finding**. A message will display indicating that a new action was created.

Deleting an Action

1. From the Event Report, navigate to the **Findings & Actions** tab.
2. Place a checkmark next to the record(s) you want to delete.
3. Click **Delete**.
4. An ‘Are you sure you want to delete this record?’ confirmation prompt will display. Select **Yes**. The record will be deleted and will no longer display in the **Findings & Actions** tab.

Modifying an Event Report

1. Select an event from the **In Progress** list. The event report will open.
2. Make the necessary changes.
3. Click **Save** to save the event, or **Submit** to submit it.

Deleting an in-Progress Event Report

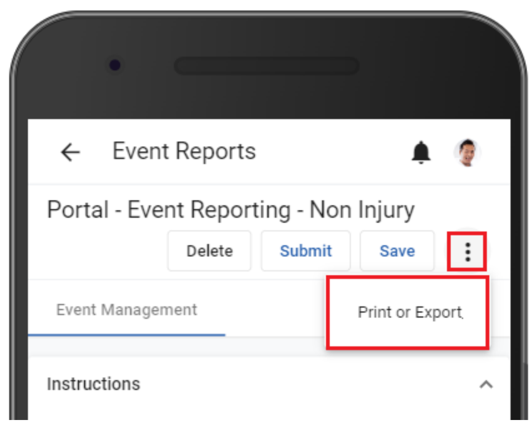
Note: You can only delete event reports that you have created.

1. Select an event from the **In Progress** list. The event report will open.
2. Click **Delete**.
3. An 'Are you sure you want to delete this record?' confirmation prompt will display. Select **Yes**. The event report will be deleted and will no longer display the Event Reports view.

Completing an in-Progress Event Report

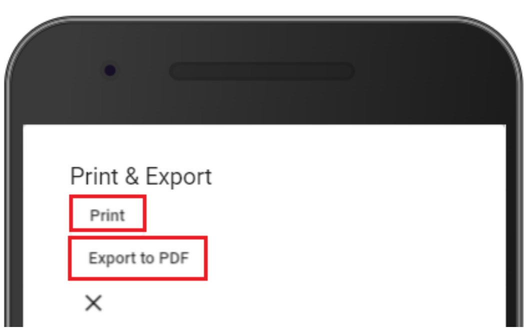
1. Select **Event Reports** from the side menu.
2. Click an event report to open it.
3. Complete the event report to the best of your ability, ensuring you provide a value for all required fields.
4. When you are finished, click **Submit**. The event report will move from the **In Progress** list to the **Previously Submitted** list.

Printing or Exporting an Event Report



1. Select an event report from the Event Report view.
2. Click the vertical ellipsis at the top right.
3. Click **Print or Export**. A read-only view of the event report will display. The view will have **Print**, **Export to PDF**, and **Back to previous view** buttons.
4. To print the event report, click **Print**. If your device is connected to a printer, a **Print** dialog will display. Select your desired printer settings and click **Print**.

   To export the event report to PDF format, click **Export to PDF**. A PDF copy of the event report will download to your device.



5. Click **Back to preview view** to return to the event report.

Scan Code

The **Scan Code** view allows you to scan, upload, or search for an asset code, and associate one or more waste records with a code. This will help you track and manage your organization's waste management obligations.

Note: It is recommended that you use the barcode scanner to scan a code, rather uploading an image from your device. This will help ensure the code can be easily read by the system.

Scanning a Code

Note: If your device is an iPhone, you can only scan asset codes using the Safari browser.

1. Select **Scan Code** from the side menu or from the Home view.
2. Hold the scanner over the code. **Note:** If this is your first time scanning a code with your device, a prompt will ask if you would like to access the camera. Click **OK**.
3. If the code is related to an existing asset, the **myCority Asset View** screen will open, displaying the equipment code, equipment type, and other details associated with the asset.

   If the code does not relate to an existing asset, you will be prompted to create a new one. Select **CREATE NEW** to create a new asset.

   The **myCority Asset View** screen will open. Complete the form to the best of your ability. When you are finished, click **Save**.

   See Adding Related Records to an Asset for instructions on how to add one or more related records to the asset.

Uploading a Code

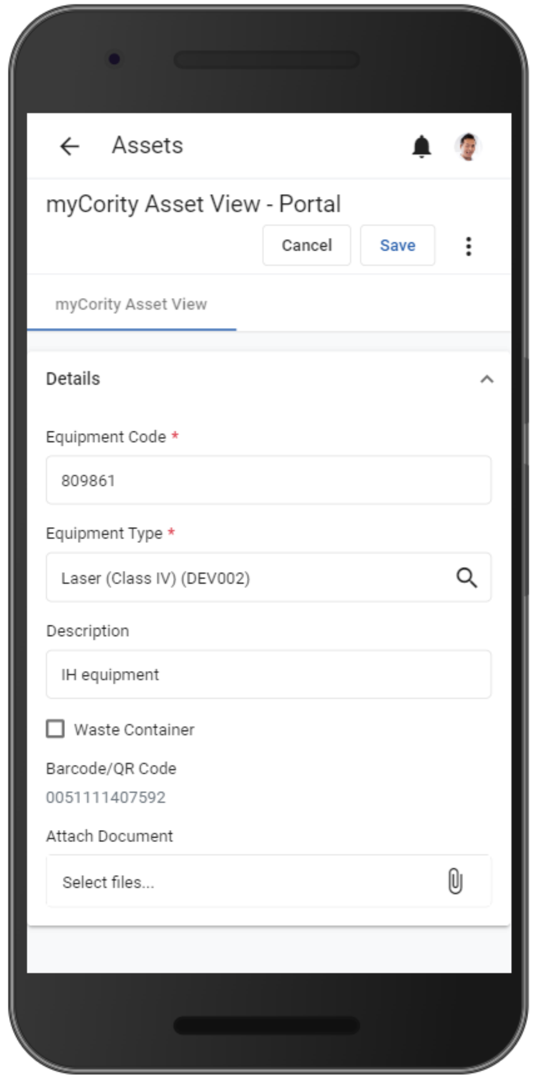
1. Select **Scan Code** from the side menu or from the **Home** view.
2. Click the **Upload File** button at the bottom of the screen. The **Open** dialog box will display.
3. Select an image from your device and click **Open**.

   Once you have uploaded the image, you will be directed to the **Asset Details** screen. The **Asset Details** screen will display the barcode or QR code image you just uploaded.

   See Adding Related Records to an Asset for instructions on how to add one or more related records to the asset.

Creating or Viewing an Asset

After you scan or upload a code, the **myCority Asset View** screen will open, displaying the equipment code, equipment type, and other details associated with the asset.



If there is no asset associated with the code, a message will display asking if you want to create a new asset. Select **CREATE NEW**.

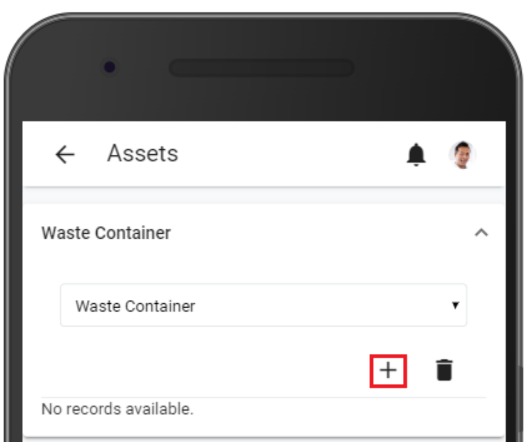
The **myCority Asset View** screen will display. Complete the form to the best of your ability. When you are finished, click **Save**.

Adding Related Records to an Asset

Note: You must scan or upload an asset before completing the following steps.

Once you have saved the asset record, the fields in the **Details** section will become read-only, and the following subsections will display on the form: **Waste Record**, **Waste Container**, **Related My Due Inspections & Surveys**, **Chemicals**, and **Asset Documents**.

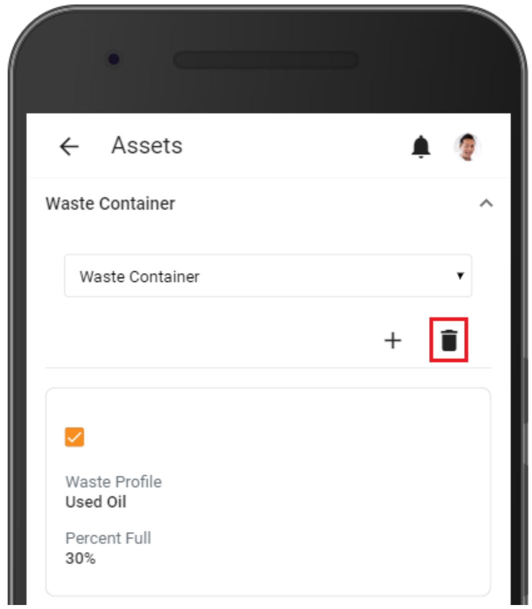
1. From the **myCority Asset View**, scroll down to the subsection to which you want to add a record.
2. Click **Add**. The **myCority <related record type> View** will open.



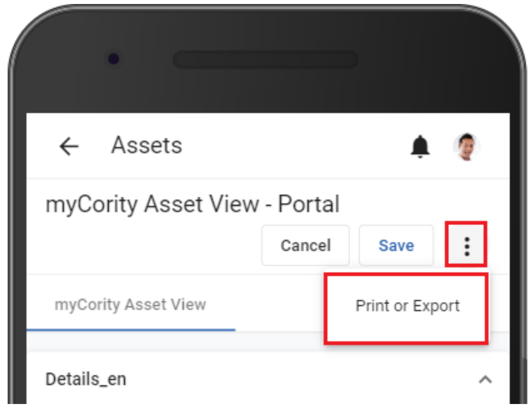
3. Complete the **myCority <related record type> View** form to the best of your ability, ensuring you provide a value for all required fields.
4. Click **Save and Close** to save the record to the asset or **Cancel** to cancel the record.
5. The asset will display in the respective subsection of the asset record.

Deleting a Related Record from an Asset

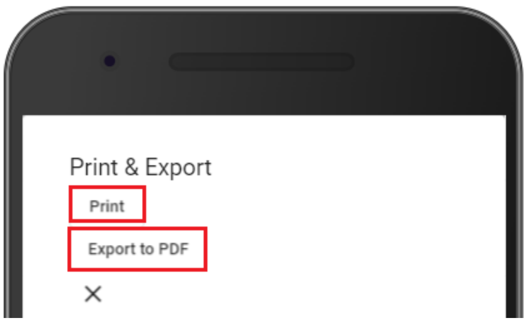
1. From the **Asset Details** screen, scroll down to the **Related Records** section.
2. Place a check mark next to the record(s) you want to delete.
3. Click **Delete**.
4. An 'Are you sure you want to delete this record?' confirmation prompt will display. Select **OK**. The record will be deleted and will no longer display on the asset record.



Printing or Exporting an Asset



1. Scan or search for an asset code.
2. From the **Asset Details** view, click the vertical ellipsis at the top right.
3. Click **Print or Export**. A read-only view of the asset will display. The view will have **Print**, **Export to PDF**, and **Back to previous view** buttons.
4. To print the event report, click **Print**. If your device is connected to a printer, a Print dialog will display. Select your desired printer settings and click **Print**.

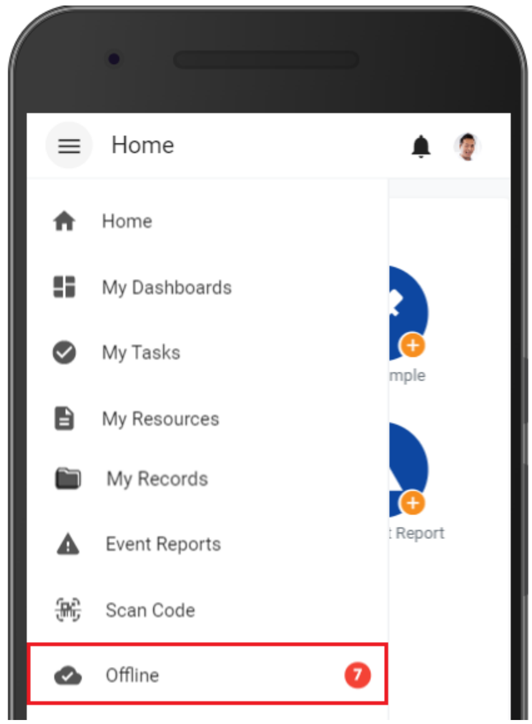


5. To export the asset record to PDF format, click Export **to PDF**. A PDF copy of the asset record will download to your device.
6. Click **Back to preview view** to return to the asset.

Offline

The **Offline** view displays public questionnaire, event report, and sample templates that can be downloaded and completed when you are not connected to the internet. You can also take an in-progress questionnaire or event report offline to complete. Offline records will be automatically submitted when you are back online.

When you are offline, a red ‘No Internet’ message will display at the top of your screen, and you will only have access to the Offline view.



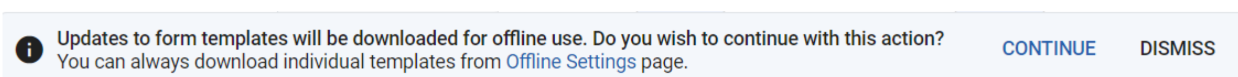
Preparing to go Offline

Before you go offline, you must ensure there are templates available for offline use, and/or select existing records to work on when you are offline. You must also configure and offline PIN that will be used to access myCority when you are not connected to the internet. See My Account > Email and Language for more information.

Once you have auto-downloaded a template or taken a record offline, the number of available offline records will be displayed in the side menu.

Auto-Downloading Templates

The first time you log into myCority, or the first time you log in after clearing your cache, you will be presented with the following message:



If you click **Continue**, all form templates will be downloaded and available for offline use. If you click **Dismiss**, no form templates will be downloaded, but you will able to download individual form templates.

If an administrator updates or changes one of your downloaded form templates, you will be prompted to re-download the form templates the next time you log into myCority.

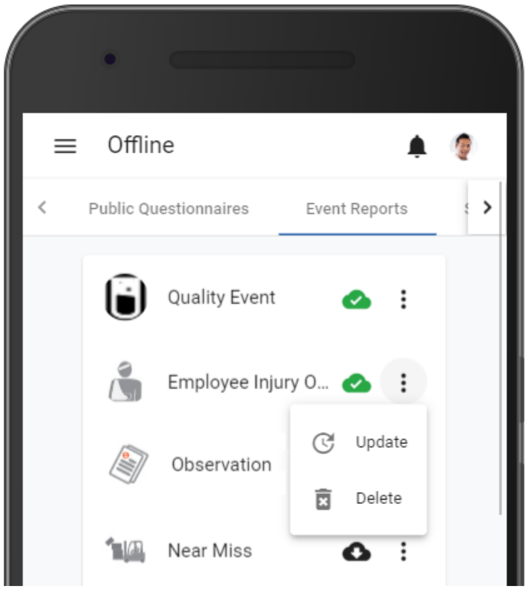
Offline Settings

Offline settings allow you to manage your offline templates. From here, you can manually download questionnaire, event report, and sample templates so they are available offline, and delete any templates you no longer need.

To access these settings, click your photo at the top right of the screen and select **Offline Settings**. **Public Questionnaires**, **Event Reports**, and **Samples** tabs will display at the top of the screen. Each tab will display a list of form templates that can be made available offline.

To make a template available offline, click the black Cloud icon to the right of the template name. The form template will download. When the download is complete a “The form is now available offline” message will display, and the Cloud icon will become green.

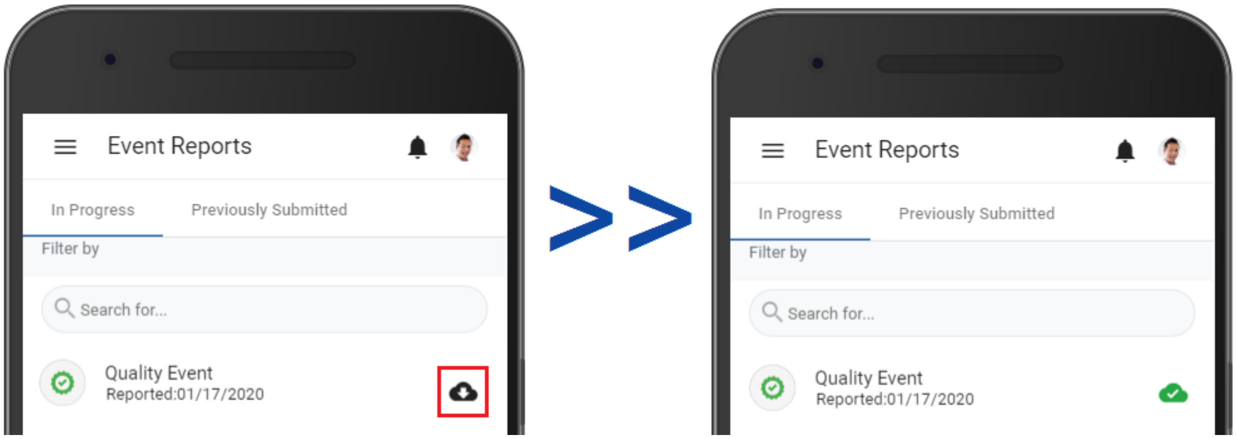
You can turn offline off by clicking ‘**…**’ and selecting **Delete**. To update an offline article, click ‘**…**’ and select **Update**.



Taking a Record Offline

It is also possible to download an in-progress event report so it can be completed when you are not connected to the Internet.

1. Select **My Tasks** or **Event Reports** from the side menu.
2. On the **In Progress** tab, a **Download** button will display beside the records that can be downloaded and accessed offline. Click the button to download the record.



When the record has been downloaded, it will display in the **Offline** view.

Completing Records Offline

When you are offline, you can either create new records based on the auto-downloaded templates in Offline Settings, or complete an in-progress record you took offline. For information on how to take a record offline, see Taking a Record Offline.

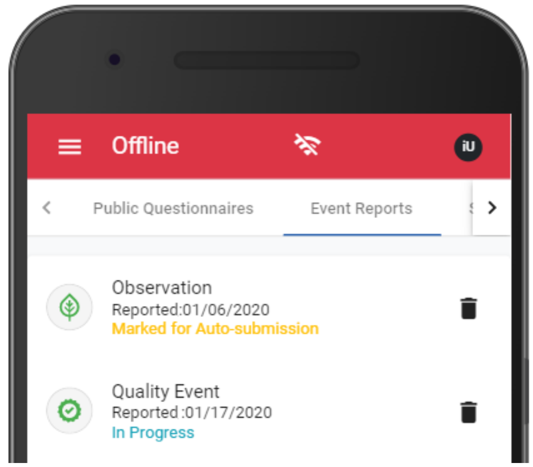
Creating a New Offline Record

Note: There must be an offline PIN configured in **My Settings** in order to create a new offline event report. See My Account > Email and Language for more information.

1. When prompted, enter your offline verification PIN and click **Log In**.
2. Select **Offline** from the side menu.
3. Click the **Create New** button. A list of available offline templates will display.
4. Locate the record you want to complete. You can use the search field to search for a questionnaire by name.
5. Click the **Download** button beside the questionnaire. A status bar will display as the questionnaire downloads.
6. When the download is complete, only the **Submit** and **Delete** buttons will display next to the record. If you click the **Delete** button, the download will be removed.

Completing an Offline Record

Note: There must be an offline PIN configured in **My Settings** in order to complete an offline task that has been assigned to you. See My Account > Email and Language for more information.



1. When prompted, enter your offline verification PIN and click **Log In**.
2. Select **Offline** from the side menu.
3. Select a record to open it.
4. Complete the record to the best of your ability.
5. To proceed to the next question, click **Next** at the bottom of the form, or select a section from the dropdown list.
5. When you are finished, click **Submit**. When you submit an offline record, a 'Records will be auto-submitted when you are back online' message will display at the top of the screen, and the record's status will change from **In Progress** to **Marked for Auto-submission**.

When you are Back Online

When you are connected to the internet again, and you are logged into myCority, any records you submitted offline will be automatically submitted in the background.

A record will have a status of **Auto-submission successful** if the record was submitted successfully, or **Auto-submit failed** if it was not. If auto-submission failed for a record, open the record to see why the record failed. Correct any errors and resubmit the record.

Appendix A: Administrator Settings

If you are an administrator, you can use the following settings to configure the appearance and behavior of myCority, and to define who can register for the service.

Note: Prior to the 2019.2 release, an administrator could grant or limit users' access to the views and record types in myCority using the **Disable <module> in myCority** system setting. In 2019.2, this setting was removed and replaced by a series of **Customize myCority** settings, which an administrator can access from within myCority. For instructions on creating myCority customizations, see Customize myCority.

System Settings

The following settings are available in System Settings in the Cority application.

- **Account Lockout Duration (in min.):** This setting will automatically unlock an account after the specified number of minutes has elapsed. If left blank, an account will remain locked until it is unlocked by an administrator.
- **Account Lockout Threshold:** This setting controls how many incorrect login attempts a user can make before the system locks their account.
- **Allow myCority users to change their email and home address information:** This setting allows users to edit their email and home address information in 'My Account'.
- **Allow Portal/myCority Users to reset their password:** This setting allows users to reset their myCority login password.
- **Authenticate Guest Accounts for myCority:** If selected, guest accounts for myCority will be authenticated.
- **Display the privacy agreement message for myCority users on login:** This setting turns the myCority privacy agreement page on or off.
- **Disable user confirmation for downloading offline templates:** If selected, the 'Form templates will be downloaded for offline use' message will not display upon logging into myCority; instead, form templates will be downloaded automatically.
- **Layout: myCority Employee Short Form:** This setting defines the layout that will be used to add employees from the employee picklist. **Note:** Users must also have the *employee.newshortform* and *employee.save* security actions.
- **Logo - Letters, myCority, and Reports:** This setting allows users to upload a company logo that will be used in the header for myCority and all reports and letters generated by Cority.
- **myCority Environment:** The URL that will be used to access myCority.
- **myCority Footer Address:** The address that is displayed on the myCority footer.
- **myCority Footer Email:** The email address that is displayed on the myCority footer.
- **myCority Footer Phone Number:** The phone number that is displayed on the myCority footer.
- **myCority Authentication Method:** The authentication method used when logging into myCority.

- **Only display signed <record type> in myCority:** When selected, users will only see signed records in myCority. When deselected, both signed and unsigned records will be displayed.
- **Privacy agreement content:** This setting defines the text that appears on the privacy agreement page.
- **Prohibit guest users in myCority:** This setting prohibits guest users from logging into myCority.
- **Prohibit myCority users from registering:** This setting prohibits guest users from registering with myCority.
- **Portal/myCority Authentication Method:** The authentication method that will be used to log into myCority. The following options are provided:
    - Application User ID and Password
    - LDAP
    - LDAPS
    - SSO (SAML 2.0)

  Note: For existing SSO users, a new IDP endpoint must be configured. The endpoint should have the same keys, but a different URL.

  To configure a new endpoint, open the SAMLKey base table in the SAML SSO server and create a new IDP. The IDP must new a new login link, and the SAML key code should be 'myCority'. When the new IDP is set up, its HTTP POST response will be *[clientsite]/saml/login?idp=myCority*. When accessing myCority, use the following URL: *[clientsite]/#/login?idp=myCority*
- **Use myCority instead of Portal/mobile:** When selected, any links to Portal/mobile will direct users to myCority.
- **User's Time Zone:** This setting defines the time zone of users in both the main Cority application and in myCority. If this setting is set to **Global**, the **Current Time Zone** setting in **My Account** will display the selected time zone in read-only format. If this setting is set to **User**, the **Current Time Zone** setting will display a drop-down list of time zones. This will enable users to change to a different time zone when necessary.

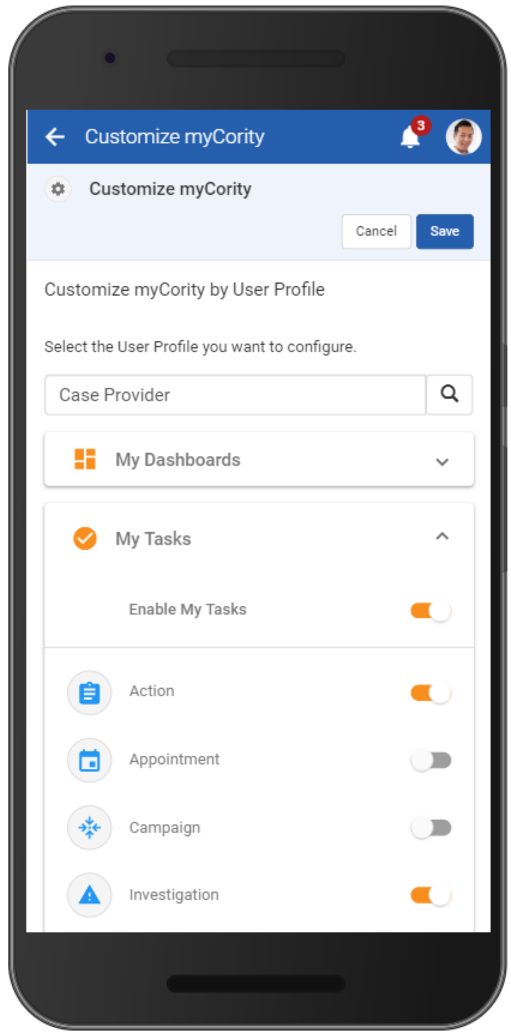
User Setup

Before employees can register for myCority, you must identify which employees are allowed to register. You can define any combination of employee type and GDDFLOB. For example, registration may be allowed for those with employee type "Employee" and Location = A. For information on how to configure myCority access, see the *Cority User Guide*.

Customize myCority

Administrators can grant or limit users' access to the views and record types in myCority. This will provide the user groups within an organization a more personalized and intuitive experience when using the application.

The customization settings are located on the **Customize myCority** screen in myCority. By default, the ability to create myCority customizations is only available to users with the Admin role. If you want this functionality to be available to other users, you must grant the *mycorityadmin* security module to their role. Otherwise, the **Customize myCority** screen will not be available.



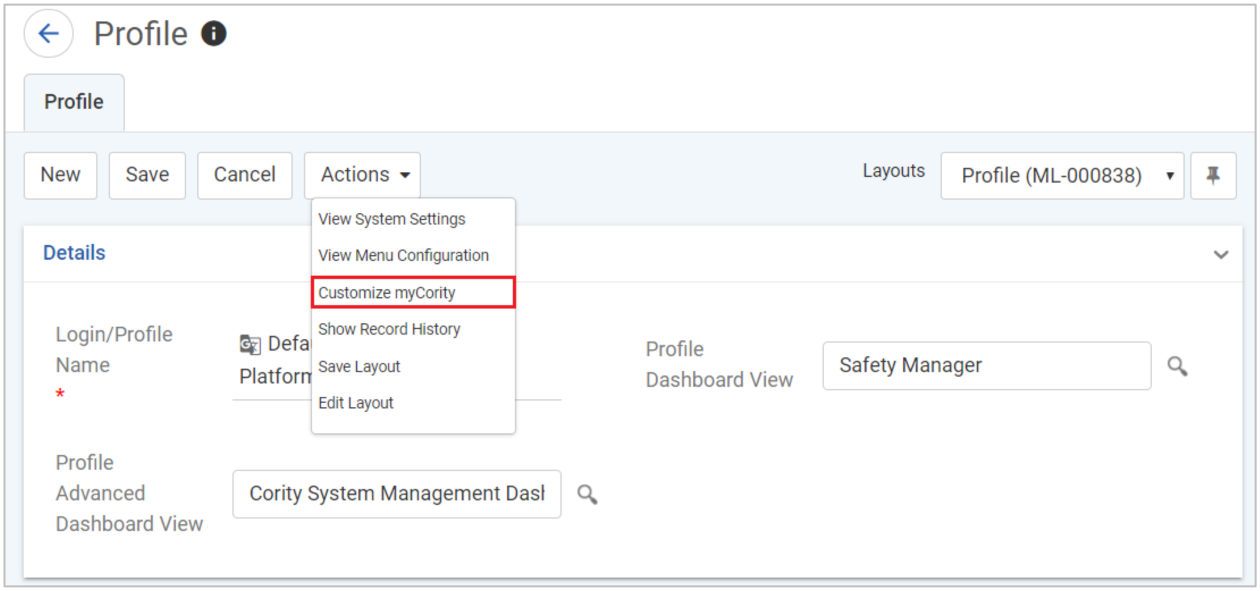
To customize the myCority settings for a user profile:

1. In myCority, click or tap your photo at the top right of the screen.
2. Select **Customize myCority**.
3. Select the user profile you want to configure.
4. Using the toggle switches, turn the desired settings on or off.
5. When you are finished, click **Save**.

An administrator can also access the **Customize myCority** settings from the Cority platform:

1. In the Cority platform, select **Administrator** > **Profiles**.
2. Select the profile you want to customize. **Note:** By default, all myCority users will have the **Default (myCority and Platform)** profile. This profile contains all of the custom settings your organization configured prior to the 2019.2 release.

3. Select **Actions** > **Customize myCority**. You will be directed to the myCority login screen.



4. Log into myCority. The **Customize myCority** screen will display.
5. Using the toggle switches, turn the desired settings on or off.
6. When you are finished, click **Save**.

Appendix B: In-App Notification Setup

Using business rules, an administrator can send in-app notifications to myCority users when an event occurs within Cority. Such notifications can be created and managed in the Cority platform. For more information on setting up business rules and business rule actions, see the *Cority User Guide*.

Setting up Business Rule Actions

A business rule action is a specific action that is configured to be performed when the business rule it is assigned to is triggered. Once you have set up a business rule action, proceed to Setting up Business Rules for instructions on assigning the action to a business rule.

1. In the Cority platform, select Administrator > Business Rule Actions.
2. Select **Actions** > **Create new in-app notification action**.

   The **Business Rule In-App Notification** layout will open. On the layout:
   - The **Send in Background** check box will be selected automatically and read-only.
   - The **Employee** entity will be selected.
   - The **Immediate** execution type will be selected.
   - The **Scheduled Value Type** will be set to **Days**.
   - The **Scheduled Condition** will be set to **Before**.
3. Enter a **Code** and **Description**.
4. In the **To** field, select the myCority user(s) who should receive the notification.
5. Enter the title of the notification in the **Title** field.
6. Enter the notification's body text in the **Body** field.
7. Complete the remaining **Business Rule In-App Notification** fields, as necessary.
8. Click **Save**. Once you have saved and closed the **Business Rule In-App Notification** layout, the action will be added to the main **Business Rule Actions** lit. Its **Action Type** will be **In-App Notification**.
9. Repeat the above steps for each in-app notification you want to set up.

Setting up Business Rules

Once you have created a business rule action, you can assign that action to a business rule. When the business rule is triggered, the business rule action(s) assigned to it will be performed.

1. In the Cority platform, select **Administrator** > **Business Rule Actions**.
2. Click **New**.
3. In the **Details** section, enter a **Code** and **Description**, select the **Entity** for which the rule will apply, and enter a **Priority** for the rule. The priority can be any integer, and determines the order that the rule is processed if there are multiple rules. Lower number priorities are processed first.
4. In the **Conditions** section, define the business rule:

- Click to select the property of the entity you wish to enforce a constraint on (note that you can also select a system setting of the type check box, look-up table, tree look-up, or free text).
- Define the criteria (operand) that you want to apply to the property.
- A third field specifies any value that the property should compare with. Depending on the type of property you select, there may be a date selector or picklist icon to help you choose a value.

To remove a condition, click the **X** at the end of the row.

5. In the **Trigger** section, define when the rule will trigger. The options are:
    - **New** - The rule will fire when starting a new record
    - **Insert** - The rule will fire when a new record is saved
    - **Update** - The rule will fire when a record is updated
    - **Delete** - The rule will fire when a record is deleted
6. Select a **Rule Type**. This is will determine the kind of rule you are creating.
    - **Message/Action** - This type of rule will always fire after the original triggering action has completed (specify which actions should run on the Action List tab). The Message box will be disabled for this type as it is not used. You can enter a Prompt which will be displayed to the user confirming if he/she wishes to execute the defined actions for this rule. No prompt is displayed if the rule was fired from a list, in which case the Default Prompt Answer is used to determine whether or not the defined actions will run.
    - **Hard Enforce** - This type of rule fires before the original triggering action completes. This rule will require all conditions to be false in order for the original action to continue or else it will be halted. Enter a Message that is displayed to the user if the conditions do not pass, instructing the user what to do next. Prompt and Default Prompt Answer are not used for this type of rule.
    - **Soft Enforce** - Similar to Hard Enforce, in that the conditions must be false in order to continue, however Soft Enforce rules give users the choice to bypass the rule even if it does not pass. Enter a Prompt for the user to ask if he/she wishes to bypass the rule if the rule initially fails. No prompt is displayed if the rule was fired from a list, in which case the Default Prompt Answer is used to determine whether or not to bypass the rule. If the answer is set to no, then the Soft Enforce will act similarly to a Hard Enforce on lists. If set to true, it will be as if the rule does not exist.
7. Select the **Action List** tab.
8. Click **+** to select the action(s) to be performed when the rule is fired successfully.

Appendix C: myCority URLs

myCority provides the ability to link directly to a record using a URL. In the 2020.1 release, the format of those URLs was updated. If you used a URL to access records in 2019.3 or earlier, it must be updated to the new format.

Record URL

- **myCority 2019.3 and earlier:** https://mycompany.my.cority.com/#/recordname/recordID

  For example:
  https://mycompany.my.cority.com/#/safetyincidentselfreport/638?eventReportTypeId=- 2

- **myCority 2020.1 and later:** https://mycompany.my.cority.com/#/record/recordname/recordID

  For example:
  https://mycompany.my.cority.com/#/record/safetyincidentselfreport/638?eventReportTypeId=- 2

Questionnaire URL

- **myCority 2019.3 and earlier:** https://mycompany.my.cority.com/#/questionnaire name/questionnaire ID

  For example: https://mycompany.my.cority.com/#/qualitypublicqrhstandaloneportal /1209?questionnaireId=125

- **myCority 2020.1 and later:** https://mycompany.my.cority.com/#/record/recordname/recordID

  For example: https://mycompany.my.cority.com/#/questionnaire/qualitypublicqrhstandaloneportal /1209?questionnaireId=125

Finding and Action URL

- **myCority 2019.3 and earlier:**
  https://mycompany.my.cority.com/#/findingandactionname/findingID/actionID

  For example: https://mycompany.my.cority.com/#/safetyactionassignee/100/200

- **myCority 2020.1 and later:** https://mycompany.my.cority.com/#/record/findingandaction name/finding ID?relatedRecord=actionID

  For example: https://mycompany.my.cority.com/#/record/safetyactionassignee /100?relatedRecord=200

Backwards Compatibility

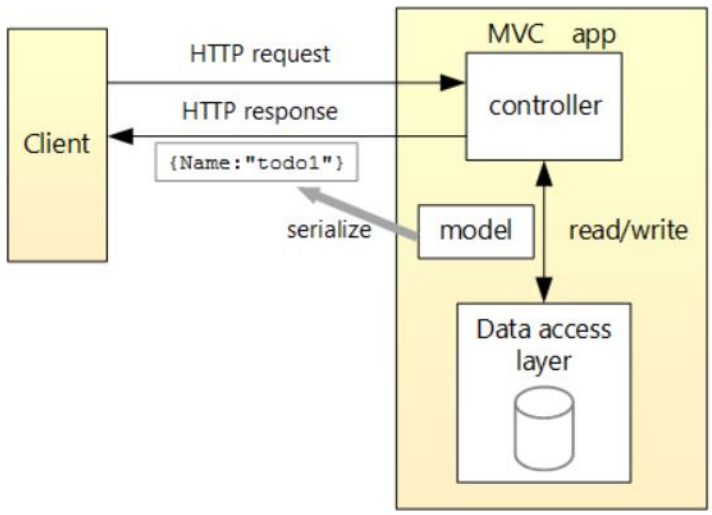
In 2020.1, you can continue using the following URLs to access records. This will be discontinued in a future release.

- https://mycompany.my.cority.com/#/safetyincident/general incident number
- https://mycompany.my.cority.com/#/safetyfindingassignee/finding.findingID/actionID
- https://mycompany.my.cority.com/#/safetycompliancefindingassignee/finding.findingID/actionI D
- https://mycompany.my.cority.com /#/environmentalincident/generalincidentnumber

- https://mycompany.my.cority.com /#/environmentfindingassignor/finding.findingID/actionID
- https://mycompany.my.cority.com /#/safetyfindingassignor/finding.findingID/actionID/
- https://mycompany.my.cority.com /#/safetyincidentehs/generalincidentnumber
- https://mycompany.my.cority.com /#/safetyincidentsupervisor/generalincidentnumber
- https://mycompany.my.cority.com /#/safetyactionassignee/actionID
- https://mycompany.my.cority.com /#/ihfindingassignor/finding.findingID/actionID
- https://mycompany.my.cority.com /#/safetycompliancefindingassignor/finding.findingID/actionID

Appendix D: Technical Architecture

myCority is a Web AI project developed using Microsoft's .Net Core library and the MVC (Model-View-Controller) architecture pattern. The client (or front-end application) that consumes the Web API was developed using the Angular 2+ framework. The client and Web API will exchange data in JSON format using the 'POST' and 'GET' HTTP requests. The diagram below illustrates this exchange:



The client application has an internet/intranet web browser interface. It is device-independent and works on up-to-date versions of Mozilla Firefox, Internet Explorer, Google Chrome, and Apple Safari.

The application runs on standard Windows servers (physical or virtual), using Internet Information Server (IIS). The IIS must have the .NET framework and .NET Core Windows Server Hosting bundles installed.

The middle tier of the application (the business tier), uses objects based on Microsoft .Net Core framework. These objects encapsulate the application logic and provide a simple interface to the upper tier. The Application Server must be a Microsoft Windows Server with Microsoft .Net framework.

myCority uses the same database as the Cority application, which runs on Microsoft SQL Server. **Note**: See the *Cority System Guide* for more information on database architecture.

myCority uses Entity Framework. This is an Object Relational Mapping (ORM) framework that will communicate to the database. Alternatively, a direct querying mechanism called 'Dapper' can be used for some queries to optimize their performance.

Authentication

Upon logging into myCority, the system will obtain a JSON web token to authenticate the request. The token will be in the following format:


```
{
  "access_token": "eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOi0yMSwiaHR0cDovL3N
  "expires_in": 86340
}
```

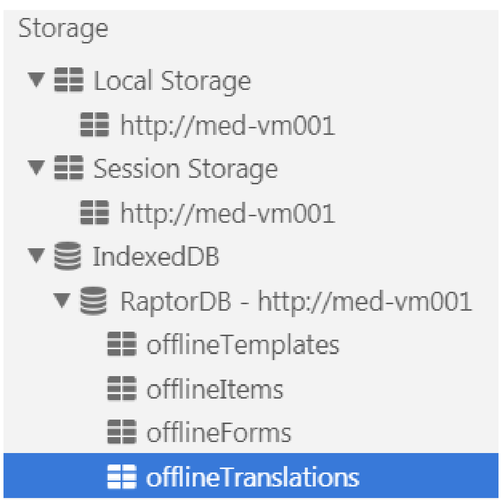

The client will store the token in the browser. When a user requests data from the Web API, the client will send the token to the Web API in the request header. Additional security and filtering will be applied based on the site security and the user's granted modules. This works the same as in the Cority platform. By default, myCority users will be granted the 'Portal' role, which will allow them to use all features of the application.

The token will expire based on the value of the 'Time Out in the Application' system setting.

A user can also log into myCority as a guest. Guest access uses the same authentication protocol described above. A guest will have no records assigned to them, but will be able to create new records.

Offline

Offline functionality will use the browser's built-in local storage. On the client side, 'IndexedDB' storage will be used. This storage method provides convenient read/write functionality from the browser's built-in database.



The stored offline data is non-sensitive, and is necessary for the offline functionality to work. This data includes form and list configurations, look-up table data (with the exception of the tree and employee look-up tables), system settings, and translations.

In 'My Settings', the user can specify an offline PIN that they will use to access the application offline. The PIN will be encrypted and stored in the browser's local storage.

myCority currently only supports basic offline functionality. This includes the ability to complete a new questionnaire and to create a new event report. The forms used to complete these tasks do not contain sensitive data; therefore, the data is not encrypted. When the application is back online, any data that was entered in a record will be cleared from the browser's storage after upon submitting the record.

To use the offline functionality, your browser must be configured to allow caching and databases. If these are disabled, offline functionality will not work.

Redis

A server-side caching mechanism is used to optimize the performance of the application. The application connects to REDIS (an open-source cache), which is used to store system data that is accessed regularly by the application (for example, system settings, translations, or form information). Redis runs as a separate service and does not need to be on the same server as the application.