

EZ Reporting

Usability Summary



BUILDING A SMARTER ENERGY FUTURE®

UX Design Strategy 2022
Lisa Revelli – Sr. UX Designer

Who	Roles
Patty Page	Manager Transmission Organizational Effectiveness
Christy Guenther	Change Manager
Jenn Rochinski	Product Owner of Plantview MPV -> EZ Reporting
Joshua Klassberg	Sr IT Infrastructure Analyst Solutions Architect
Lead IT Applications Analyst	Jason Overcash
Shawn Mathes	IT Software Engineer
Chance Kaim	Backend Developer
Dhruvit Patel	Frontend Developer
Priya Immadi	Frontend Developer
Lisa Revelli	User Researcher, UX/UI Designer

GOALS of Plantview 2022 MVP Initiative

SIMPLIFY EVENT REPORTING

'Lightweight' version of the Plantview UI to make it easier for folks to report minor issues and process improvement ideas. Fewer fields and easy code selection.

ENCOURAGE more reporting

Increase Reporting in Low Level Events, specifically Level 3

Increase reporting on 'smaller stuff' that will also prove valuable.

STREAMLINE INFORMATION

- Simplifying and streamlining the form
- Automatically generates an event in PlantView () similar to the [TOMS BOT](#) process
- Solution to Speed up Reporting of low-level events (Level 3) **72+ hours → 48 hours**

SHARE LESSONS LEARNED/PREVENTATIVE MEASURES

- Share mistakes without punitive consequences
- Create supportive reporting culture

- 185 CTA were asked of the users
- User were presented 2,365 event & cause codes to read through to determine which applied to them
- Codes, descriptions, & terminology on the PV form were not clear to users
- User support was not offered
- 48 hours reporting window from the time of incident

Event Definition

Close & Refresh

Event 731P-22-1161749
Last Edit Feb 16, 2022 01:13 by LREVELL

Update

Delete

Event Title

Date of Event

Event Status

Crew

Entity

HPI Metric Event? CESR Classification?

Category and Cause Code (Required)

Event Category

Event Category Detail

Event Classification

Cause Code Category

Cause Code

Cause Code Detail

Contributing Cause(s) Specification

There are currently no Contributing Cause Codes associated with this item.

Behavior(s) Not Met

Behavior Categories

Behaviors

Event Background Information (Required)

Work Description

Event Description

Describe what would have prevented the event

Summarize the Immediate Actions Taken

Lessons Learned

Initiator Phone Number

Responsible Person Phone Number

KPI Information (Mgmt/Admin Only)

CMI KPI Impact

KPI Category \$ Impact

KPI Details

NERC Compliance Reference

CATSWEB Milestone Identifier

Root Cause Analysis

Analysis Type (Required)

Executive Summary

Root Cause Team

Root Cause Team Lead

Data Analyzed

Date Initiated Date Approved

Add Attachments (Optional)

There are currently no Attachments associated with this item.

Related Modules (Corrective Actions)

There are currently no PlantView Items associated with this item.

Related Displays

Display Name	Description of Display	Go
Event Notification	Notify other plants about the TP-Trans Planning Carolinas Event and review their applicability discussion	<input type="button" value="Go"/>



Data/Time Data Last Updated
12/5/2021 3:09:06 AM

Distribution Events in Past 1 Day(s)

Carolinas Delivery Operations East

CD-CAR-E C&M Triad

CD-High Point

Event Report	1208900
Analysis Level	Level III
Event Title	Non-Driving/Claims only-POV contacts DE V
Date of Event	12/2/2021 1:11:00 PM
Region	CD-CAR-E C&M Triad
Plant/Ops Center	CD-High Point
Unit	CD-High Point
Type of Event	Safety
Event Status	Open and Sent to eTRAC
Event Category	Safety
Event Category Detail	Vehicle-PV hits Company vehicle
Event Classification	Vehicle / Powered Equipment
Near Miss Source Code	
Entity	High Point Operations Center
Cause Code Category	Open
Cause Code	Open
Cause Detail	Open
Work Description	Duke Energy Line Truck parked inside work zone
Event Description	Non-driving/claims only-POV contacts DE vehicle; On 12-02-21 a DE crew was working at the Intersection of Randolph St. and Liberty Drive in Thomasville, NC. Crew had a work zone set up by a SPA contract flagging crew. POV entered the self regulated lane shift and made an improper turn contacting the properly parked Line truck that was not being used at the time. No crew members were endangered of being struck by the POV and no injuries were reported as a result of the contact. Minor damage was sustained to the line truck with front end damage to the POV. Management and local PD were contacted.
Immediate Action Taken	Management and Local PD notified
Describe what would have prevented the event	Flagging crew needed to be monitoring the self regulated lane shift to aid in assistance with traffic flow and provide warning to crew if needed.
CMI	N/A

Considered Reports & Lists of Plantview Event Reporting

Transmission & Distribution Cause Codes		
TER 1	TER 2	TER 3
Design / Engineering	Design Input LTA	Design output cannot be met
		Design input obsolete
		Design input not correct
		Design input not available
	Design Output LTA	Design output not clear
		Design output not correct
		Design output not addressed in design output
		Design input not addressed in design output
		Design, specification, or data error
		Design or equipment or material selection
		Design not detectable
		Design not reasonable
	Design / Documentation LTA	Design/Documentation not complete
		Design/Documentation not up to date
		Design/Documentation not controlled
	Design Verification / Installation Verification LTA	Independent review of design/Documentation LTA
		Testing of design/Installation LTA
		Independent inspection of design/Installation LTA
		Acceptance of design/Installation LTA
	Operability of Design / Environment LTA	Ergonomics LTA
		Physical environment LTA
		Natural environment LTA
Equipment / Material	Calibration for instruments LTA	Calibration LTA
		Equipment found outside acceptance criteria
		Coordinated testing or adjustments of instrumentation LTA
	Periodic / Corrective Maintenance LTA	Preventative maintenance for equipment LTA
		Preventative maintenance LTA
		Corrective maintenance LTA
	Inspection Testing LTA	Equipment history LTA
		Start up testing LTA
		Commissioning LTA
		Post-commissioning / post-modification testing LTA
	Material Control LTA	Material handling LTA
		Material storage LTA
		Material packaging LTA
		Material shipping LTA
		Material unloading LTA
		Shelf life exceeded
		Unacceptable material substitution
		Tracking/testing LTA
	Procurement Control LTA	Control of changes to procurement specification/purchase order LTA
		Substituted item did not meet requirements
		Inspection items required
		Residue acceptance requirements LTA
	Defective, failed, or contaminated	Damaged, defective or failed part
		Defective or failed material
		Defective metal items, welding joints, crimp, hinge, or other connection
		End of life failure
		Electrical or instrument noise
		Contaminant
	Equipment Interactions LTA	Software failure
		Communications path LTA
		Data quality LTA
		Supporting power system LTA
		Unfeasible operation of coordinated systems

Event-Free Operations Good Catch

Choose 1 Cause Code Category AND 1 Cause Code AND 1 Cause Code Detail

Cause Code Category	Cause Code	Cause Code Detail
<input type="checkbox"/> Communications	<input type="checkbox"/> Verbal Communications LTA	<input type="checkbox"/> Communications between work groups LTA <input type="checkbox"/> Correct terminology not used <input type="checkbox"/> Information sent but not understood <input type="checkbox"/> No communication method available <input type="checkbox"/> Shift communications LTA <input type="checkbox"/> Suspected problems not communicated to supervisor <input type="checkbox"/> Verification/repeat back not used <input type="checkbox"/> Ambiguous instructions/requirements <input type="checkbox"/> Data/computation wrong/incomplete <input type="checkbox"/> Difficult to implement <input type="checkbox"/> Equipment identification LTA <input type="checkbox"/> Facts wrong/requirements not correct <input type="checkbox"/> Format deficiencies <input type="checkbox"/> Incomplete/situation not correct <input type="checkbox"/> Typographical error <input type="checkbox"/> Wrong revision used <input type="checkbox"/> Checklist LTA <input type="checkbox"/> Deficiencies in user aid (charts, etc) <input type="checkbox"/> Format deficiencies <input type="checkbox"/> Improper referencing or branching <input type="checkbox"/> Instruction step/information in wrong sequence <input type="checkbox"/> Recent changes not made apparent to user <input type="checkbox"/> Unclear/complex wording or grammar <input type="checkbox"/> Lack of written communication <input type="checkbox"/> Not available, or inconvenient for use
<input type="checkbox"/> Written communication Method of Presentation LTA		
<input type="checkbox"/> Written communication not used		

RCA Incident Report - Submittal (SRP) - Internet Explorer

Incident Report TILL-19-006565
Last Edit Nov 02, 2019 16:06 by SDAHESEK

Close & Refresh Update Delete

Incident Report # 6565

is a description of the incident. This is a description of the incident. ...

Recurring Issue? Yes

Event Report MAR-19-006523
Last Edit May 22, 2019 12:08 by SDAHESEK

Close & Refresh Update Delete

Created: 05/22/2019 12:08

Date/Time of Event * 05/22/2019 12:08

Contact Information

Condition Report TH-22-006861
Last Edit Feb 16, 2022 18:41 by SDAHESEK

Close & Refresh Update Delete

Created: 05/22/2019 12:08

Date/Time of Event * 05/22/2019 12:08

Summarize the Immediate Actions Taken

Describe what would have prevented the event

Contact Information

Initiator n/a Contact Information

Responsible Person n/a Contact Information

Add Attachments (Optional)

There are currently no Attachments associated with this item.

Related Displays

Display Name	Description of Display
[Event] Definition	Information about the [Event] that occurred at Renewables (Solar) on 05/22/2019

Condition Report (Entry) - Internet Explorer

Condition Report TH-22-006861
Last Edit Feb 16, 2022 18:41 by SDAHESEK

Close & Refresh Update Delete

Condition Report # 6861

Condition Title Created: 02/16/2022 18:41

Condition Description

Immediate Action Taken

Date of Condition 02/16/2022 18:41

Plant / Unit

Initiator Contact Information

Test Users

Test Users	Role	Notes:		
Erik B. Sears	Sr. Project Manager	Manager of PMs, MidWest (Ohio, Kentucky)		
Andy Bradley	Supervisor Transmission Relay C&M	Construction Management		
Terry Pendergraft	Supervisor Transmission Relay C&M	Construction Management		
Kate Anderson	System Ops, Engineer II in Transmissions, periodic field inspections	Have Not used PV, Run the Grid, Health		

Review or record personal flow of event reporting in Plantview, ideas you may have had after that initial session, and what you think is relevant or not relevant to you. [The Problems](#), [Interviews](#)

The Problem - User is tasked with reporting & categorizing

End Users Perspective

"The end-user (technician, supervisor) finds the online Event Reporting Form difficult and frustrating to use and therefore do not complete or don't attempt it at all."

- Problem 1 - **User's apprehension**
 - Fear of reprimand or intense interrogation
 - Unnecessary Escalation
 - Who will it go to?
 - High Need of Validation from colleagues/supervisor
 - Does this field apply to my event?
 - What does the code mean?
 - Not sure how to use the form
 - Not clear of form verbiage - Are the Headings clear? Are the index terms (keywords, tags, subject headings) clear?
- Problem 2 – **Form Interaction**
 - Event Reporting Navigation doesn't follow a simple task flow.
 - Event and Cause Codes are not easily accessible to them through the form.
 - Too many drop-downs and cascading menus
 - Some fields do not work
 - Possible mismatch of User Flow and Form Layout - Define the gap



Boots on the Ground/
On the Field, Site
Inspector

Notifies
Supervisor

Supervisors, Project
Managers

Stakeholders

Administrator also inputs,
Tech & Supervisor

Plantview Input

DE Related
Groups

Sr. Managers,
Director

Technicians

3rd Party
Vendors

Consensus on
Preliminary
Report

Plantview Input

AM
Reviewers

Transmission Reports

Sr. Managers, Director

Plantview Event
Reports
Repository

Sr. Managers

Data Analysts

Submits to DE Level 3 Events
Library/Repository

C-Level

Proposed:

Input from on-field
technicians

Currently everyone can input in PV
(i.e. Boots,Field)

Review Process & Establish IT for
all employee levels

Dependent on Level of Event
-Equipment Faulty, safety &
reliability risk

Involving a group outside group -
then report will be in cue, paused.

Mislabeling

Crew is not applicable because are
all internal

Training should be at initial
appointment of managerial
position. Currently, its when the
event happens, learn-as-you-go

Training in the verbiage. Standard
language for event reporting for
the managers to learn so the
system to categorize the event -
less human error.

End Users Perspective - Interviews

Interviewee: Erik B. Sears Feb. 9, 2022

Sr. Project Manager, Manager of PM, MidWest (Ohio, Kentucky)

- Would like Budget Overrun choice for Event type (Financial)
- More specific terms for choices, kind of vague
- Commented that “What would you have done to prevent”.. How can we think about that when we don’t even understand what happened
- Seem to not want the task of coding to fall on him
- Suggested field techs can submit Plantview reports on a mobile app

Interviewee: Andy Bradley Feb. 14, 2022

Supervisor Transmission Relay C&M, Construction Management

- Prioritized Narrative - written first to be clear of the event - who, what, how, why did the event happen, is it a good catch, start to finish.
- Unlimited Text field - average input is ½ page, limitation of word counts a hindrance, offers PV 1,000-1,500, user needs to paint the picture needs 2500 depending on severity (3000 characters or 500 phrase)
- Ability to post pictures, more efficient to understand the event
- Need a location field
- Take the analysis level or code out of initial submission
- In agreement with report status cue
- **Event Status:** Open to Etrac, Investigation in Progress, RCA,

Interviewee: Terry Pendergrass Feb. 15, 2022

Supervisor Transmission Relay C&M, Construction Management

- Internal involvement so Crew field not needed
- Event details can list after typing in first 3 letters
- Uploading photos would help
- Terry goes first to event type then down to event category

Interviewee: Kate Anderson Feb. 15, 2022

Engineer II of Preventions & Control
Kalu Bhatara - Manager

Kate does Transmission Substation field inspections periodically. She takes pictures and notes. She hasn’t had a reason to do an event reporting yet.

For inspections, photographs are key and clearer to identify equipment.

End Users Perspective - Interviews

Feedback from Peter Thomopoulos - Feb. 18, 2022

Sr. Project Manager

- Eliminating the need to refine cause codes; as most of the ones there appear to be applicable to a L1 or L2 event, not driven from a BCA or RCA for that event level
- HP Behaviors - Not Met, Good Catches also do not need causal fields.
- Have the event reporting process updated to reflect managements expectations for events outside of L1, 2, or 3:
 - Transmission expectats to get reports in sooner than 48 hours.
 - Good catches or Near Misses to be entered sooner than 48 hours. They do not qualify as an event.
- Required sign off on events **before** entry into PlantView **seems to cause delays and added work before entry**. We can always modify events after the fact. It would be nice to change the internal Transmission process (not required per the TRM CAP procedure) to allow us to enter events with the current facts known; and update the PV event later (if / when warranted). Pre-screening event / good catch entries causes delays on my end in meeting the timeliness requirements for L3 events. **Referring to the back & forth of preliminary drafting.**

Transmission Corrective Action and Lesson Learned Program

5.1.5 The Event Initiator should only enter what is known at the time of entry; some data fields, if not a required field in the CAP tool, may be left blank. The event can be updated with additional or revised information at a later time as it becomes available.

5.1.6 The Event Initiator notifies the manager/supervisor the event report has been initiated. The immediate manager or supervisor should then evaluates the event entry to ensure the entry is based on the impact to the business unit or Enterprise. They may request additional information if deemed necessary.

5.1.7 Some Safety and Environmental events are required to be reported to regulatory agencies within 24 hours. Contact your EHS Specialist or refer to the EHS Event Reporting and Investigation Program (ADMP-EHS-EHS-00004). All other events should be reported within 48 hours from the date of discovery.

PLANTVIEW

Event Reporting

Design Requirements



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Event Reporting Process

SITUATIONAL ANALYSIS

WORK (Task) DESCRIPTION

EVENT DESCRIPTION

PROBABLY CAUSE

Factors leading up to event, 'All-stop' whether if its an emergency (ask someone from CMV- constur. maintain.veg.)

SHARE LESSONS LEARNED/PREVENTATIVE MEASURES

- Share mistakes without punitive consequences
- Create supportive reporting culture

Please fill in the following with all relative information to the event (the more information you provide, the less likely there will be a need for follow-up correspondence)

Submitter Name:

Event Title:

Date the Event Occurred: [Click here to enter a date.](#)

Type of Event: [Choose an item.](#)

Work Description:

Event Description:

Describe What Would Have Prevented the Event:

Summarize Actions Taken:

List Affected Groups/Individuals that Should be Notified Prior to the Event being Distributed:

HP Event Template - Preliminary Report

Data points and their code assignments

Make a matrix with the remaining **PHRASE** codes to determine type (skills, time, external) and see how those are coded or what codes relate to the major or sub impacts.

Employee Impacted		Service Impacted		Department Impacted		Equipment Impacted		External Impacted	
Skills	Code		Code		Code		Code		Code
Sickness	Code		Code		Code		Code		Code
Time	Code		Code		Code		Code		Code
	Code		Code		Code		Code		Code
	Code		Code		Code		Code		Code

[CauseCodeDefined](#)

What would not apply to Level 3

- KPI, Root Cause Analysis, CATSWEB, Near Miss Source Code fields, CMI
- Attachments – should not be for Level 1 & 2, or VCA or investigations, less than 5% for additional information besides investigation.
- Majority of users have not attached documents.
- Kim Uses Attachments – information from contractors, photos, docs or ppt. RRE has attachments.

PlantView Input Form - Input Categories Defined

Color coded indicating these are Hidden from User - NOT on Form

Transmission Report	Proposed	Definition
Event Title	Event Title	Drawn from Registered Group
Analysis Level	Analysis Level	Categorizes into Levels 1-3, Good Catch, Near Miss
Region	Derived from PV when user drills down to specific folder to add ER	User's Station
Plant/Ops Center	Derived from PV when user drills down to specific folder to add ER	User's Station
Unit	Derived from PV when user drills down to specific folder before adding Event Report	User's Station
Date of Event	Date of Event	Time
Event Report ID & Entity	Plant Location	Seems like it should encompass to user's region, plant/ops cntr, unit
Event Category		
Event Status		Initiated, In cue or reviewing, Submitted
Event Category Detail	Event Category Detail	
Event Description	Event Description	
Type of Event	Type of Event	
Event Classification		
Immediate Action Taken	Immediate Action Taken	
Work Description	Work Description	
Cause Code Category		
Cause Code		
Cause Detail	Cause Detail	

PLANTVIEW

Event Reporting

Proposed Solutions



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UX Design Strategy 2022
Lisa Revelli – Sr. UX Designer

Proposed - **Incremented reporting to contain and track reporting process within a system**

<https://miro.com/app/board/uXjVONfy6as=/>

Proposed Incremental Reporting

Step 1
For Boots on the Ground, Technician to report Level 3 events

Step 1 - Initiating the Report with Narratives & Photos

Status - Initiated

Event Title

Naming Conventions should be established

Date of Event

Location of Event

Location is shown up in Transmission Report - as Entity. The user must go into 2 layers of the system folders to add an event reporting form in their department that is the same for all

Type of Event

Near Miss	Good Catch	Level 1	Level 2	Level 3
Definition	Definition	Definition	Definition	Definition
Examples	Examples	Examples	Examples	Examples

Can codes be cleanly categorized?

Work Description

Recommended: 1500 characters

Average one spaced page usually contains about 3000 characters or 500 words

Event Description

Recommended: 3000+ characters

Users need to have training on how and what to report using standard verbiage to make keyword recognition easier

Attach Supporting Images

Allow for phone snapshot resolutions. Need to ask how many images are usually needed to tell the story.

Summarize Immediate Action Taken

Recommended: 3000+ characters


Preventative Measures

What to include in the Incident/Event Description:


- How, when, where and whom
- Address
- Time of incident
- Name of affected individual
- A narrative description of the incident, including the sequence of events and results of the incident
- Injuries, if any
- Treatments required, if any
- Witness name(s)
- Witness statements
- Other workers involved
- Video and/or 360-degree photographs of the scene

Perhaps have a Tableau with description fields.


Drag from PC/phone & Drop feature would be efficient.



Paul and I were up on the turbine at 6:30am. Working on the wiring. We wore our PPE and strapped in pretty well.



The turbine was suppose to be powered down but we heard a whirring noise. And we realized someone had turned the power on.



We could have used our radios to communicate to our supervisor. But we were concerned there would not be enough response time so we parachuted off.

Initiator Name

Phone

Email

Responsible Party List all if more than one.

Phone

Email

Requesting Review

Distribute to:

Name Email Respond by What Date?

Assure user that notifications will be send immediately with reminders.

Submit

Status - Initiated

Step 2
Verification, Validation,
with reporting techs,
Supervisors, Project
Managers , Third Party

Status - In Review

Event Title: North Carolina, Head Turbine Cleaning, Near Miss
Event Date: February 17, 2022
Event Type: Near Miss, Level 3
Initiator: Name / Phone / Email
Responsible Parties:
• Name / Phone / Email
• Name / Phone / Email
• Name / Phone / Email

Designated Reviewers:
• Name / Phone / Email
• Name / Phone / Email
• Name / Phone / Email

REPORT INITIATED: February 17, 2022 - 08:00
SUBMIT REPORT BY February 19, 2022
TIME LEFT: 23 hours 10 min

Work Description submitted by John Doe, ID#, Internal, Transmissions

Work Description - editable by reviewer
Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularized in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Comments or questions from reviewer name:

Event Description submitted by John Doe, ID#, Internal, Transmissions

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Comments or questions from reviewer name:

Attached Supporting Images



The turbine was suppose to be powered down but we heard a whirring noise, and we realized someone had turned the power on.



The turbine was suppose to be powered down but we heard a whirring noise, and we realized someone had turned the power on.



We could have used our radios to communicate to our supervisor, but we were concerned there would not be enough response time so we shut them off.

Comments or questions from reviewer name:

Summarize Immediate Action Taken

Summarized Immediate Action Taken - editable by reviewer
Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularized in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Comments or questions from reviewer name:

Preventative Measures

Preventative - editable by reviewer
Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularized in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Comments or questions from reviewer name:

Submit

Status - In Review

Step 2 - In Review
Verification, Validation with Initiator,
Responsible Parties, Supervisors, Project
Managers

Step 3
Confirmation, Code of
Events and Causes by
Supervisor or Coding
Specialist

Report Submitted

Status - In Review

Event Title: North Carolina, Head Turbine Cleaning, Near Miss

Event Date: February 17, 2022

Event Type: Near Miss, Level 3

Initiator: Name / Phone / Email

Responsible Parties:

- Name / Phone / Email
- Name / Phone / Email
- Name / Phone / Email

Designated Reviewers:

- Name / Phone / Email
- Name / Phone / Email
- Name / Phone / Email

REPORT INITIATED: February 17, 2022, 08:00

SUBMIT REPORT BY: February 19, 2022

TIME LEFT: 3 hours 24 min

Work Description submitted by John Doe, ID#, Internal, Transmissions

Learn team has been the industry standard dummy test ever since the 1950s, when an unknown prior task a galaxy of type and scrambled it to make a type specimen book. It has survived not only the cataclysmic fire, but also the loss of the original operating, remaining essentially unchanged. It was discovered in the 1950s with the release of L Lorem ipsum passage, and more recently with desktop publishing software like Adobe PageMaker, including versions of Lorem Ipsum.

Event/Incident Description submitted by John Doe, ID#, Internal, Transmissions Reviewed by Jane Doe

Learn team has been the industry standard dummy test ever since the 1950s, when an unknown prior task a galaxy of type and scrambled it to make a type specimen book. It has survived not only the cataclysmic fire, but also the loss of the original operating, remaining essentially unchanged. It was discovered in the 1950s with the release of L Lorem ipsum passage, and more recently with desktop publishing software like Adobe PageMaker, including versions of Lorem Ipsum.

Attached Supporting Images

The turbine had supposed to be powered down but we heard a whirring noise. And we realized someone had turned the power on.

The turbine had supposed to be powered down but we heard a whirring noise. And we realized someone had turned the power on.

We could have used our radios to communicate to our supervisor. But we were concerned there would not be enough response time as we descended off.

Summary of Immediate Action Taken. Reviewed by Jane Doe

Summarized immediate action taken. Learn team has been the industry standard dummy test ever since the 1950s, when an unknown prior task a galaxy of type and scrambled it to make a type specimen book. It has survived not only the cataclysmic fire, but also the loss of the original operating, remaining essentially unchanged. It was discovered in the 1950s with the release of L Lorem ipsum passage, and more recently with desktop publishing software like Adobe PageMaker, including versions of Lorem Ipsum.

Preventative Measures Recommendations

Learn team has been the industry standard dummy test ever since the 1950s, when an unknown prior task a galaxy of type and scrambled it to make a type specimen book. It has survived not only the cataclysmic fire, but also the loss of the original operating, remaining essentially unchanged. It was discovered in the 1950s with the release of L Lorem ipsum passage, and more recently with desktop publishing software like Adobe PageMaker, including versions of Lorem Ipsum.

Notes

This event is a Near Miss and as no injuries reported but should be flagged as general warning to learn.

Event Category

Responsible Party selects event category.

Event Category Detail

Responsible Party selects event category detail.

Event Classification Derived from System

Event Code Detail

- Self
- Confined Space
- High Voltage
- Personal Safety/Hazards, Unsafe Conditions
- Vehicle as Equipment Being Brought On Site
- Vehicle as Equipment
- Vehicle as Equipment
- Vehicle as Equipment
- Vehicle Being Brought On Site
- Vehicle into other vehicle
- Vehicle Hit stationary object
- Vehicle-Flying Object
- Vehicle-Interaction
- Vehicle-Other
- Vehicle-By this company vehicle
- Vehicle-Vandalism

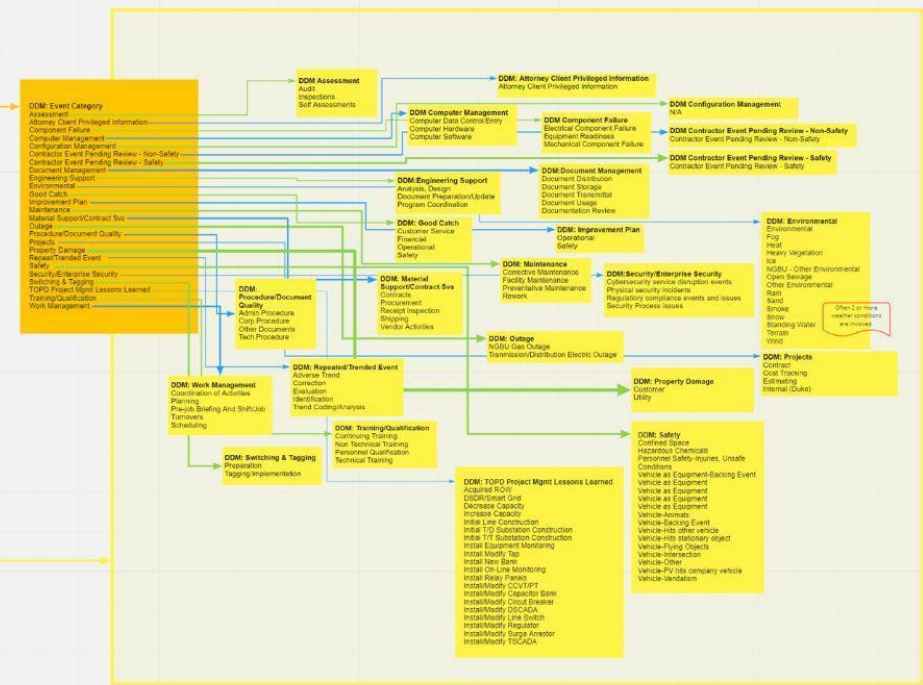
- Event Categories
- Assessment
- Attorney Client Privileged Information
- Component Failure
- Computer Management
- Configuration Management
- Contractor Event Pending Review - Non-Safety
- Contractor Event Pending Review - Safety
- Equipment Management
- Engineering Support
- Environmental
- Good Catch
- Improvement Plan
- Maintenance
- Material Support/Contract Site
- Outage
- Project
- Property Damage
- Repaired/Threatened Event
- Safety
- Security/Enterprise Security
- Switching & Tagging
- TOPD Project Mgmt Lessons Learned
- Training/Qualification
- Work Management

Submit

Status - In Review

Step 3 - Coding Events and Cause:

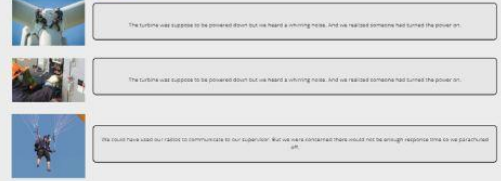
Event Category -> Event Category Detail Information Flow



Event/Incident Description submitted by John Doe, ID#, Internal, Reviewed by Jane Doe

Loren spent the last 10 days in the industry standard during the year since the 1950s, when an unspoken primer took a galaxy of type and condensed it to make a type specimen book. It has survived not only the centuries, but also the way his electronic, separating, remaining essentially unchanged. It was published in the 1950s with the release of Loren's new printing software (Loren's Print Manager), and more recently with desktop publishing software like Adobe PageMaker, including versions of Loren's team.

Attached Supporting Images



Summary of Immediate Action Taken, Reviewed by Jane Doe

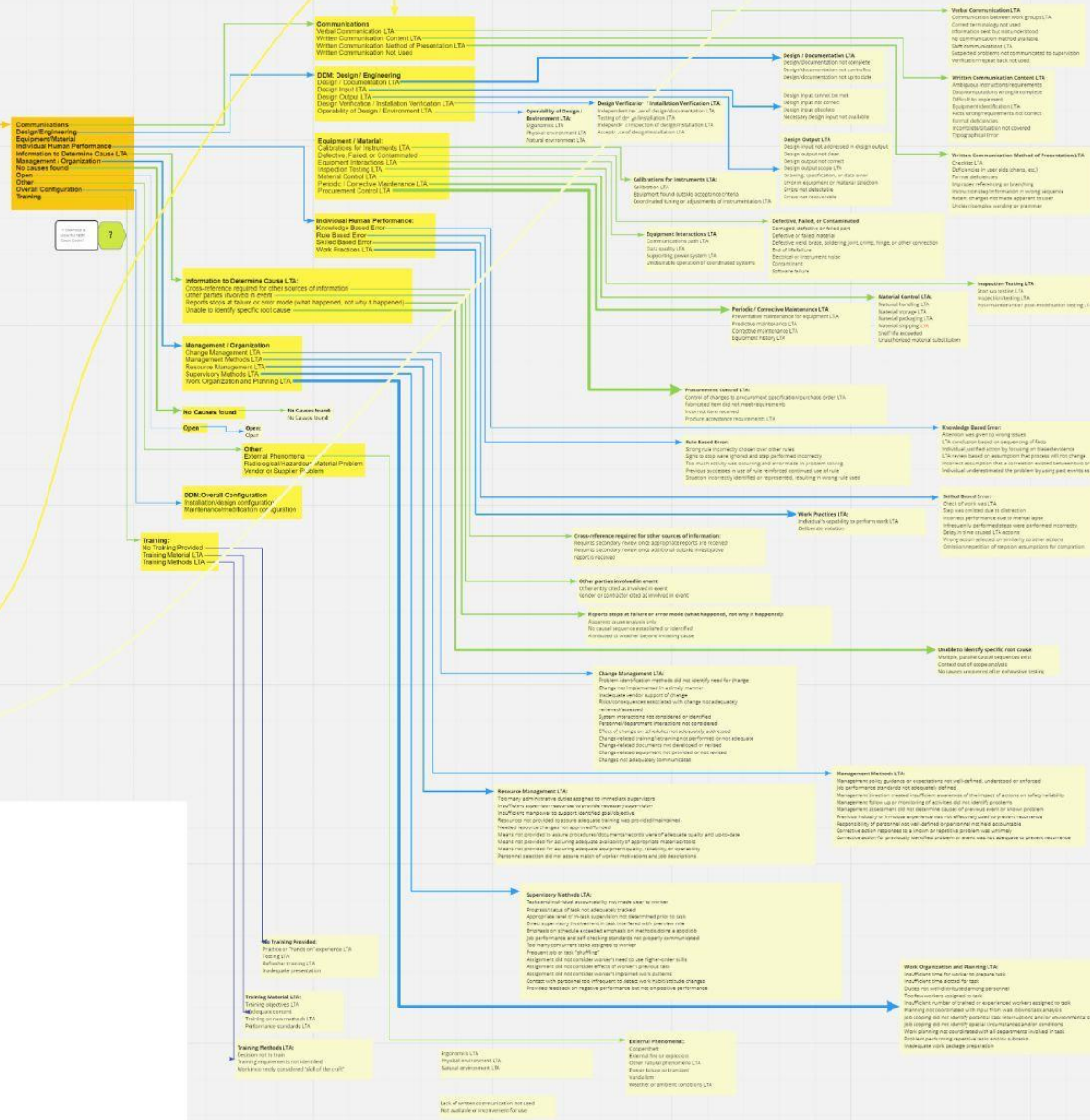
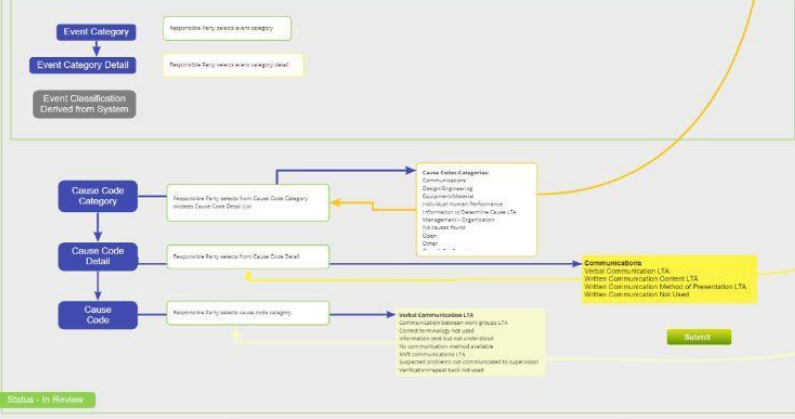
Summarized Immediate Action Taken
Loren spent the last 10 days in the industry standard during the year since the 1950s, when an unspoken primer took a galaxy of type and condensed it to make a type specimen book. It has survived not only the centuries, but also the way his electronic, separating, remaining essentially unchanged. It was published in the 1950s with the release of Loren's new printing software (Loren's Print Manager), and more recently with desktop publishing software like Adobe PageMaker, including versions of Loren's team.

Preventative Measures Recommended

Loren spent the last 10 days in the industry standard during the year since the 1950s, when an unspoken primer took a galaxy of type and condensed it to make a type specimen book. It has survived not only the centuries, but also the way his electronic, separating, remaining essentially unchanged. It was published in the 1950s with the release of Loren's new printing software (Loren's Print Manager), and more recently with desktop publishing software like Adobe PageMaker, including versions of Loren's team.

Notes

This event is a near miss and so no further reporting should be required as per general reporting to team.



Cause Codes are a 3-tier set to define Category, Detail, and Code

Accepted Solution:

A single form that enters data directly to Plantview for level 3 events. Not to include approval for supervisors. An option for location or station ID for user to input outside of Plantview.

Wireframe in Process

Glassberg, Joshua Roth Yesterday 9:05 AM

Does this look accurate?

<u>Field</u>	<u>Type</u>
Analysis Level	Ask User
Cause Detail	Ask User
Date of Event	Ask User
Describe what would have prevented the event	Ask User
Event Category Detail	Ask User
Event Description	Ask User
Event Title	Ask User
Immediate Action Taken	Ask User
Type of Event	Ask User
Work Description	Ask User
Event Status	STATIC - Always "Closed"
Unit	STATIC - Always "Transmission"
Cause Code	Tied to Cause Detail
Cause Code Category	Tied to Cause Detail
Event Category	Tied to Event Category Detail
Event Category Detail	Tied to Event Category Detail
Plant/Ops Center	?? Ask User
Region	?? Ask User

The Problem – Fear of Reprimand, Getting someone in Trouble, Intense Interrogation

End Users Perspective

- Offer anonymity

DE wants a safer place for everyone. Your reporting is important to everyone. We ensure you a safe place to land while reporting. Report fairly and objectively. Give details as much as possible.

I have read and understood.

Anonymous – your name or names in report de-identified.

SUBMIT

"no one wants to be put in there"
- or name referenced

Administration Perspective

- User is less apprehensive of reprimand, blame, and can focus on true reporting.
- Non-authoritative person can contact end user if necessary

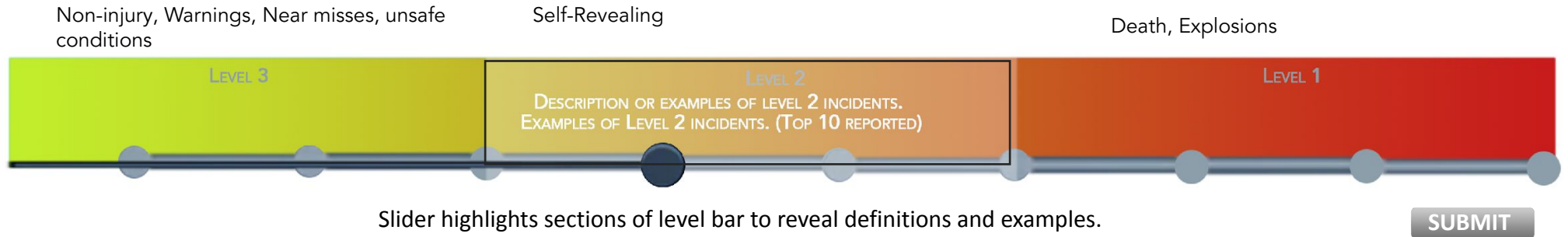
Information Flow Feature

- Names can be inputted but 'anonymous' feature will de-identify names
- Backend will keep a history version if investigation calls for it

The Problem - Does this field apply to my event? Unnecessary Escalation

End Users Perspective

- Enable with Knowledge, Present what is Relevant
 - Define for user what is Level 1, Level 2, Level 3, Good Catch, Near Miss
 - Give top 5-10 incidents in each level.
 - Let the user decide



Administration Perspective

- Autonomizing categorizing event: The system flags the possible category the event may be categorized in. This would objectively avoid misjudgements and indecisiveness if the submitted report should be escalated or not.

Information Flow Feature

- Automation: Categorizes event for the user, then presents a relevant form for them to report.

The Problem – High Need of Validation from colleagues/supervisor. Events involve more than one individual or group

End Users Perspective

- Gathering information between individual(s) or management groups
- Document Sharing to collaborate on report
- Have a working cue with a Status - Open/In Review/Submitted

Events happen among individuals and among groups. For any investigation, the details of events provided by witnesses are a critical element of the evidence gathered. If your event reporting involves other groups, Plant View offers a collaborative recall/witnessing platform.

Click here to enable Document sharing

Share with name@email.com
Separate emails by commas

SUBMIT

Contacts will receive notification with due date of participation. Permissions of Editing or View only can be set.

Request for Supervisor's Review before submittal.

Erik Sears: Event reportings involve other groups reading their entries - Work Managers, Stakeholders, Construction management, public engagement.

Each status stage must be initiated by supervisor.

Possible Solutions

1. Since users are not familiar with the Event and Cause Codes
 - a. Add a Quick Reference sheet that is accessible similar to the one for Cause Codes and provide training to make users aware

Category and Cause Code (Required)

Event Category	Component Failure
Event Category Detail	Electrical Component Failure
Event Classification	Not Applicable
Cause Code Category	Equipment / Material
Cause Code	Defective, Failed, or Contaminated
Cause Code Detail	Defective weld, braze, soldering joint, crimp, hinge, or other connection

- b. Potentially add questions that would guide users to the correct codes and it would automatically populate based on choices
- c. Can the amount of codes be reduced but still be effective for driving Human Performance and Operational Excellence?

2. The Event Reporting form is NOT the same for all of DE. We all use the same database and tables but the forms and dropdown selections are different based on group. The Category and Cause Code section is for Transmission & Distribution but some of the other fields on the form are different based on which form is being populated. These selections can be split if needed since there are two different forms with different IDs.

Category and Cause Code (Required)

Event Category List ...	Transmission & Distribution
Cause Code List ...	Transmission & Distribution
Reviewed (Lock Cause Codes) No	
Event Category	Component Failure
Event Category Detail	Electrical Component Failure
Event Classification	Not Applicable
Cause Code Category	Equipment / Material
Cause Code	Defective, Failed, or Contaminated
Cause Code Detail	Defective weld, braze, soldering joint, crimp, hinge, or other connection

Need Clarification:

These selections can be split if needed since there are two different forms with different IDs. Do you mean the Event and Cause Codes?

Research Source – Data Capture of Plantview Inputs (6 years)

[Raw Data Analyze](#)

r after 1/1/2016 12:00:00 AM and is before 1/1/2023 12:00:00 AMRegion is not n/a

Business	Event #	EVENT	EVENT	CREW	Event C	Event C	TYPEOF	EXSUM	BEH
C&M	1073136	Incorrect r	***Per review by CES	Improvem	Operation	Contractor/Vendor	Perf		
C&M	1073136	Incorrect r	***Per review by CES	Improvem	Operation	Contractor/Vendor	Utili		
C&M	1073136	Incorrect r	***Per review by CES	Improvem	Operation	Contractor/Vendor	Utili		
C&M	1144280	Good Catc	Relay calibration on t	Componer	Electrical C	Good Catch			
R&PM	1053021	Testing CT:	The Wix Capacitor re	Work Man	Coordinati	Work Process /Proce			
C&M	1044995	Trenton Ci	Cir 3261 CCVT structu	Improvem	Operation	Good Catch			
C&M	1066976	Regulator	While performing In-	Improvem	Operation	Good Catch			
C&M	1069139	Good Catc	Wireman and Relay t	Improvem	Operation	Good Catch			
C&M	1069893	heath Retz	Wile performing 360	Improvem	Operation	Safety		Line	
C&M	1075936	Unground	CT termination block	Improvem	Operation	Reliability		Utili	
C&M	1082231	Incorrect F	While calibrating a KF	Improvem	Operation	Good Catch			
C&M	1082330	Bad çKFç	While performing cal	Improvem	Operation	Good Catch			
C&M	1092415	Bus Diff Re	Relay Technicians we	Improvem	Operation	Good Catch		Adh	
R&PM	1101500	AED Out-o	In-office personnel nç	Assessmer	Inspection	Good Catch			
SPO	1044993	ECC Opera	On 4/15, CPM distrib	Improvem	Operation	Good Catch			
C&M	1047359	Haines Cre	At Haines Creek Subs	Improvem	Operation	Good Catch			
C&M	1089384	Stuart DC	Relay Support and W	NERC Com	(PRC) Prot	Good Catch			
ENG	1063080	Unknown	The Construction, Mç	Improvem	Operation	Good Catc		During ins	
ENG	1045004	Contractor		Improvem	Operation	Good Catc			

Development Milestones:

Milestones		Milestones	Notes
Users Identified for Design Sessions			Erik B. Sears – Sr. Project Manager Andy Bradley – Supervisor Transmission Relay C&M Terry Pendergraft – Supervisor Transmission Relay C&M Kate Anderson – Systems Ops
Cause Code List		2.14.2022	Patty Page 80> codes
User Feedback on Codes		2.14.2022	Erik Sears - Sr. Manager
Comprehensive User Research Report		2.18.2022	Lisa Revell Information user flow
API Spec		2.22.2022	Preliminary Wires - Lisa
AWS Integration Wireframes Designed, skin concepts,		02.24.2022	AWS sandbox approval, integration
App Screens in Development		03.01.2022	2.17 Drew 1-2 day
Testing		03.14.2022	Date for Testers, Approved Design Handed off to Developers
Assessments		03.16.2022	
User Testing Assessments/Design Iterations		03.21.2022	
Deployment		03.31.2022	

Top Contributors

↗ Most | ↘ Least

VALUE	FREQUENCY
Amanda.Breland@d...	5
Patty.Page@duke-e...	5
Sean.Bill@duke-en...	5
Randy.Veltri@duke-...	3
Keith.Gifford@duke...	3



Newsletter Accolade
of top Event Level III
reporters.

Snapshots - The TOP FIVE (April - June 17)

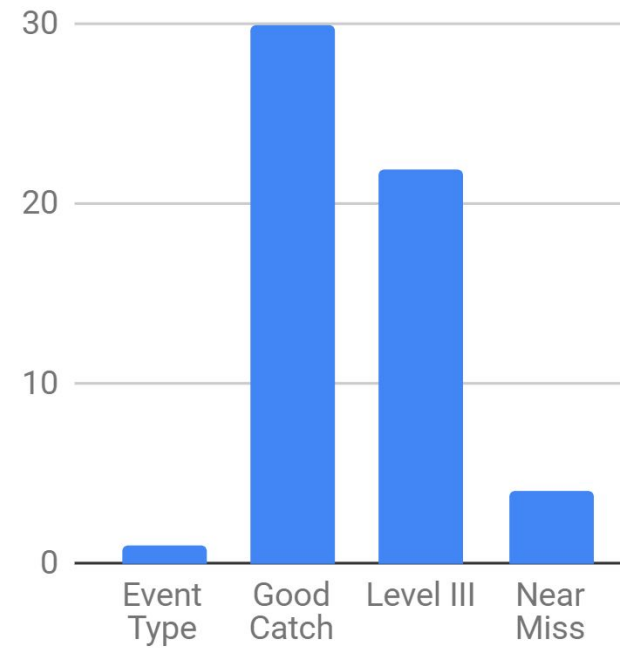
Top Plant Names

↗ Most | ↘ Least

VALUE	FREQUENCY
Project Mgmt Car E...	8
Asset Protection M...	4
Contractor Veg Mg...	2
MW P&C Plainfield	2
Project Mgmt Florida	2

Event Types

Count | Distribution



Snapshots - The TOP FIVE (April - June 17)

Cause Codes

↗ Most | ↘ Least

VALUE	FREQUENCY
Design Output LTA	10
Written Communica...	9
Skill Based Error	7
Defective, Failed, or...	6
Report stops at fail...	3

Cause Codes Category

↗ Most | ↘ Least

VALUE	FREQUENCY
Design / Engineering	13
Equipment / Material	13
Individual Human P...	11
Communications	10
Information to Dete...	4

Snapshots - The TOP FIVE (April - June 17)

Event Category

↗ Most | ↘ Least

VALUE	FREQUENCY
Engineering Support	13
Substation Mainten...	9
Improvement Plan	7
Procedure/Docume...	6
Material Support/C...	4

Event Category Detail

↗ Most | ↘ Least

VALUE	FREQUENCY
Safety	7
Line Engineering	5
Substation Enginee...	5
Preventative Maint...	4
Admin Procedure	4

Event Classification

↗ Most | ↘ Least

VALUE	FREQUENCY
Not Applicable	22
Materials	4
Electrical Compone...	4
Design Error	3
Duke Utility	3

Snapshots - The TOP FIVE (April - June 17)

PLANTVIEW Event Reporting

EZ Reporting Form 2022

<https://ezreport-sbx.duke-energy.app/>



BUILDING A SMARTER ENERGY FUTURE®

UX Design Strategy 2022
Lisa Revelli – Sr. UX Designer