Lifeguard Solutions

Lifeguard Solutions
COVID-19 Response Kit

Installation, Configuration & Administration Guide

Documentation Changes

This topic details the document updates that have been made for each release of this documentation.

If you have any comments or feedback on this guide, please email info@lifeguardsolutions.io. We welcome your questions and feedback.

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March 26, 2020 - Version 1.0
March 31, 2020 - Version 1.1
April 1, 2020 - Version 1.2
April 2, 2020 - Version 1.3

Table of Contents

Overview & Requirements

The Lifeguard Solutions COVID-19 Response Kit is a free native package intended to provide;

- Proactive Management and Awareness
- Management's Role & Response
- Continual Improvement

It includes 3 Lightning apps

1. Safety - Manage Illness/Injury, Safety Observations and Hazard Analysis
2. Inspections - Manage Audits & Compliance Calendar
3. Form Builder - Build and manage inspection forms

Required Salesforce minimum editions

- Lightning Platform
- Professional Edition + API access
- Enterprise Edition
- Unlimited Edition

This document assumes the reader has a minimum understanding of Salesforce administration principles and is designed to provide minimum requirements for use of the App and best practices recommendations.

If you require additional help outside of the scope of this document, we encourage you to consider our QuickStart package. For more information, please contact us at info@lifeguardsolutions.io.

Install COVID-19 Response Kit

This section covers how to install the COVID-19 Response Kit managed package (the App) and complete the initial account configuration.

Use this procedure to install and deploy COVID-19 Response Kit. If you have questions about downloading AppExchange applications, refer to the Salesforce Help page for more information.

To install COVID-19 Response Kit:

1. Get the COVID-19 Response Kit App. Find the App in the AppExchange and click Get It Now. This takes you to the Confirm Installation page.   Note: You might be asked to log into your Salesforce account

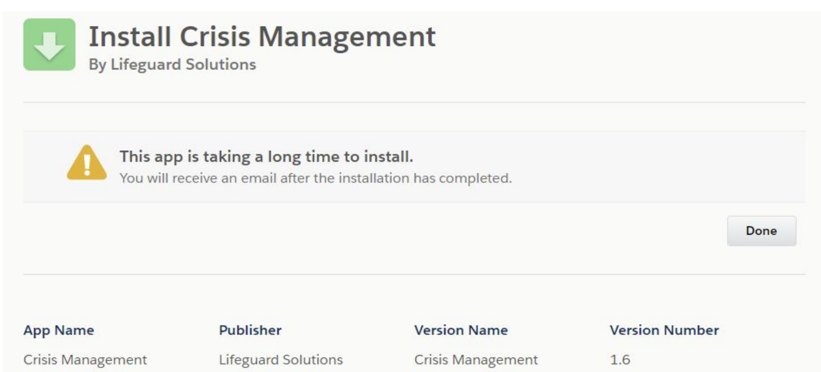
2. Review the instructions, type your Salesforce credentials for the location where you are installing COVID-19 Response Kit, read and agree to the terms & conditions and then click Install. You are taken to the Package Installer page. **Note: we recommend installing into a sandbox first for review and testing**

3. Review Package Installation Details. From the Package Installer page, click the View Components to see the components installed with COVID-19 Response Kit. Click Install to continue with the installation.

4. Choose the security level. The security level determines user access to COVID-19 Response Kit. **Grant access to admins only** (you will grant access to users through permission sets in a

later step)

5. You are now ready to install COVID-19 Response Kit to your Salesforce org. Click Install to continue. The installation process begins and can take up to 15 minutes. You will be notified by email when it is completed.



6. After installation, on the list of Salesforce Installed Packages, you can see the COVID-19 Response Kit package. When the installation is completed, you are ready to configure the App.

Configure COVID-19 Response Kit

Use this procedure to configure COVID-19 Response Kit. Configuration includes adding permission sets to users, setting up record types, assigning layouts.

To configure COVID-19 Response Kit:

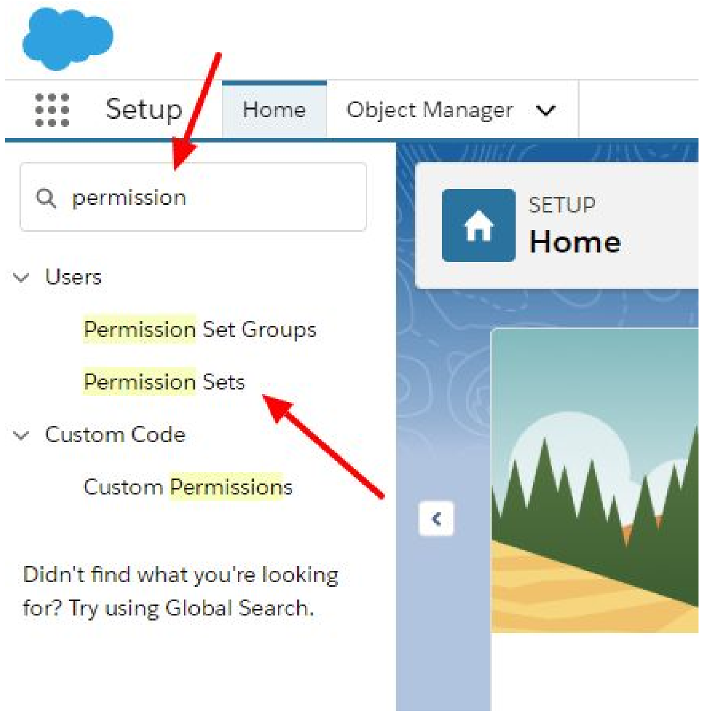
1. **Assign Permission Sets to Users in bulk - required**

   (to assign to a single user refer to the Salesforce Help)

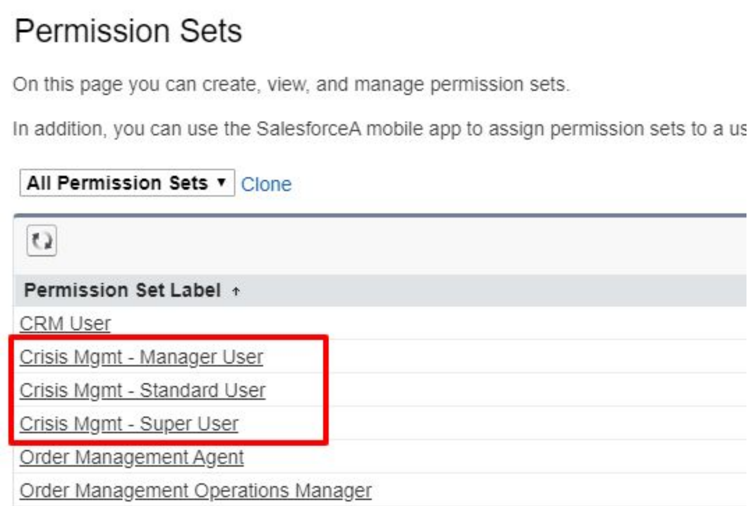
   a. There are 3 standard permission sets that are included in the package. Here are the detailed permissions for each.

      i. Standard User - Create & Edit for Safety
      ii. Manager User - Create & Edit, View All for Safety & Inspections App
      iii. Super User - Create & Edit, Modify All for Safety, Inspections, Form Builder App

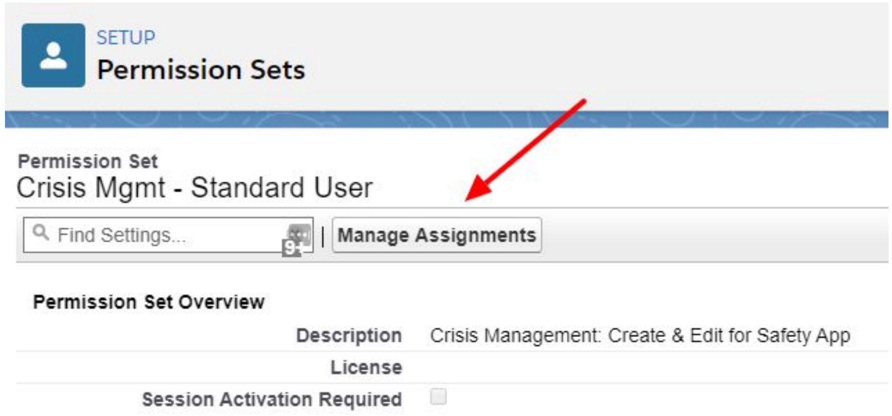
b. From Setup, enter "Permission" in the Quick Find box, then select permission sets.



c. Select the desired permission set you wish to assign:



d. Select Manage Assignments and select the users you wish to assign.



e. You will not be able to modify these permission sets because they are part of the managed package. Simply clone them and make the necessary changes if required. In order to meet your company's data sharing requirements you may need to adjust other permissions. Please refer to Control Who Sees What in Salesforce Help.

f. As System Permissions cannot be packaged within the permission sets of a managed package, the user's access to Report and Dashboard functionality will depend either on any existing profile or permission set capabilities assigned, or a new in-org permission set created and granted allowing these capabilities.

2. Setup contact record types and page layouts - recommended

Note: if all employees are currently licensed in your Org, then reporting can be done using user records, not contact records. If you have a mix of both, we still recommend using contacts for them.

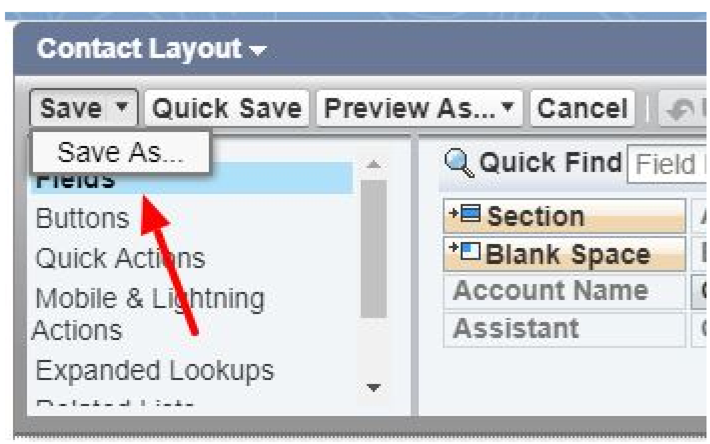
Since you are tracking details about employees and other stakeholders within your company (like suppliers or contractors), we recommend that you set up record types for them for better reporting and page layouts. If your Salesforce org contains these types of accounts and/or contacts already you may want to ignore this step and report using whatever filtering criteria you currently have configured. We suggest creating layouts to assign to those record types. Setting required fields on those layouts will also ensure better data quality.

a. Review the [Salesforce Help article]() on record type creation if required.

b. Under the Contact object, create a new record type called Employee. Do similar for other types as required.

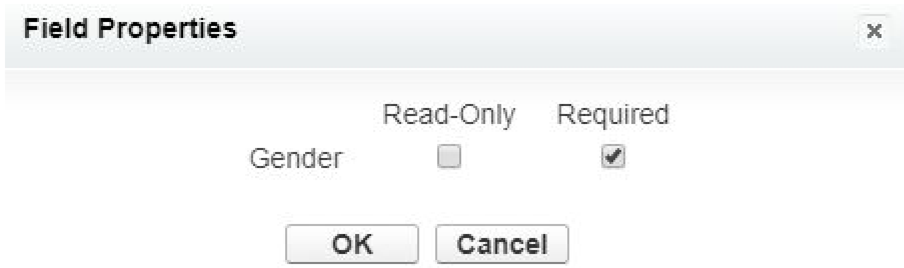
c. Review the [Salesforce Help article]() or [Trailhead]() on page layout creation if required.

d. Under the Contact object, open a standard layout and Save As a new one.



e. In the new layout, add the necessary fields. We recommend Gender, Birthdate and Occupation as a minimum for tracking employee injuries or illnesses.

f. Set any required fields on the layout.



3. **Setup account record types and page layouts - recommended**

We suggest creating record types for accounts if you need to manage them by an Internal Organization or Contractor. If your Salesforce org contains these types of accounts already you may want to ignore this step and report using whatever filtering criteria you currently have configured.

a. Review the Salesforce Help article on record type creation if required.

b. Under the Account object, create a new record type called Internal Organization. Do similar for other types as required (Contractor, Vendor etc).

c. Review the Salesforce Help article or Trailhead on page layout creation if required.

d. Under the Account object, open a standard layout and Save As a new one.

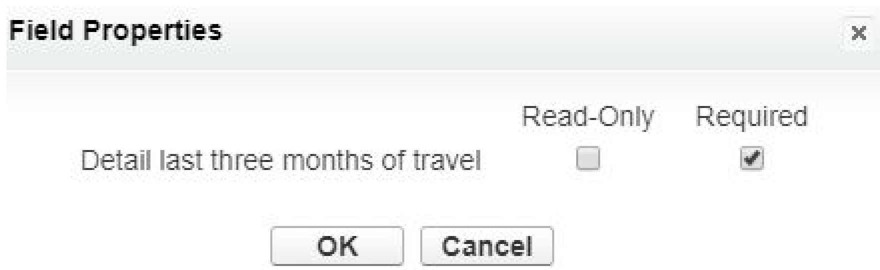
e. In the new layout, add the necessary fields.

f. Set any required fields on the layout.

4. Set required fields on other COVID-19 Response Kit object page layouts - recommended

Setting required fields on those layouts will also ensure better data quality. We recommend setting required fields on the Illness/Injury object as a minimum.

a. In the object layout set required fields.



5. Activate email notification workflow - recommended

Email notifications are critical to ensure that users are made aware of new record creation or assignment. Note that these are available for Enterprise Edition Licenses only.

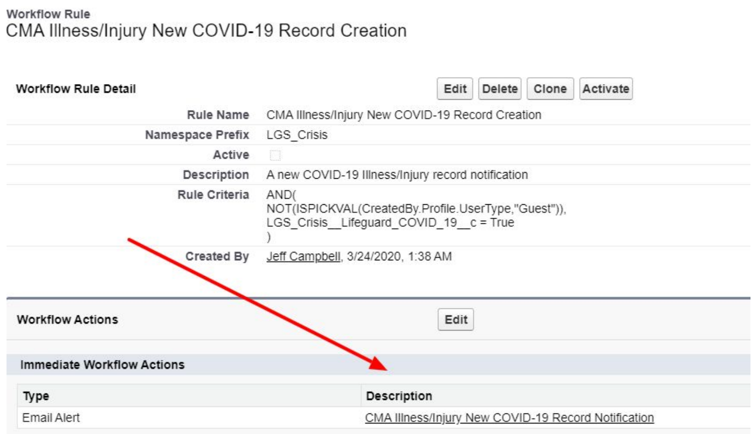
Name	**Object**	**Description**
CMA Illness/Injury New COVID-19 Record Creation	Illness & Injury	A new COVID-19 Illness/Injury email notification - triggered when a new Illness/Injury record is created

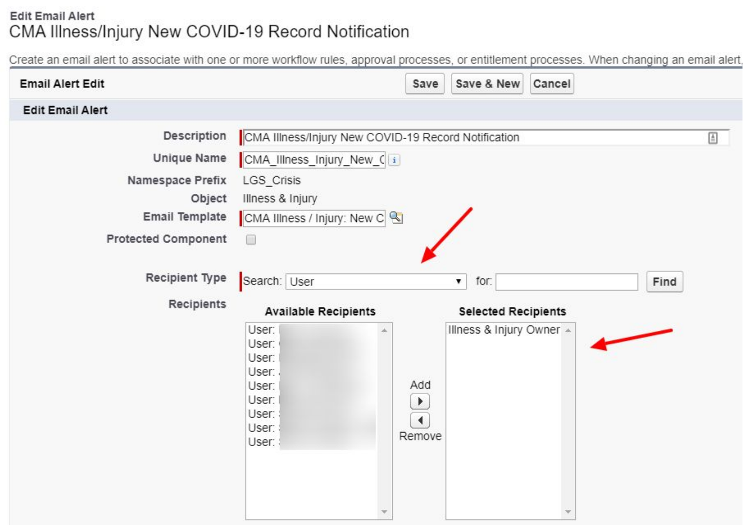
CMA Illness/Injury New Record Creation - SITES	Illness & Injury	A new Sites-generated Illness/Injury email notification - triggered when a new Self Report form is submitted Refer to Create the Salesforce Sites Self-Report URL
CMA SWA - New Record Creation	Stop Work Authority	A new SWA Record email notification - triggered when a new Stop Work Authority is created
CMA CAPA - Change of Owner Notification	CAPA	CAPA email notification to changed Owner - triggered when the owner is originally assigned hanged

a. From Setup, enter “Workflow” in the Quick Find box, then select Workflow Rules.

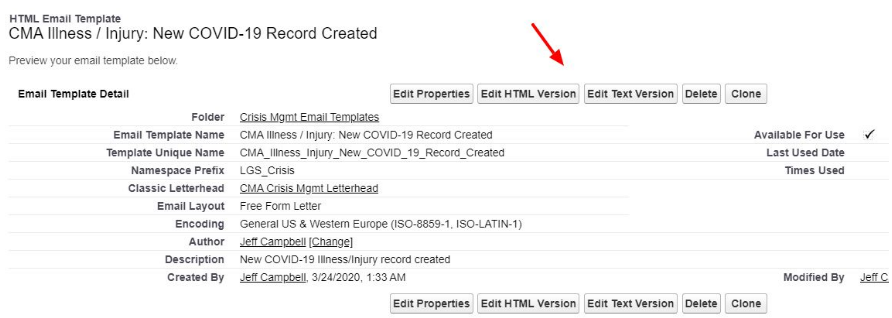
b. Select the relevant rule and activate it.

c. Edit the email alert recipients





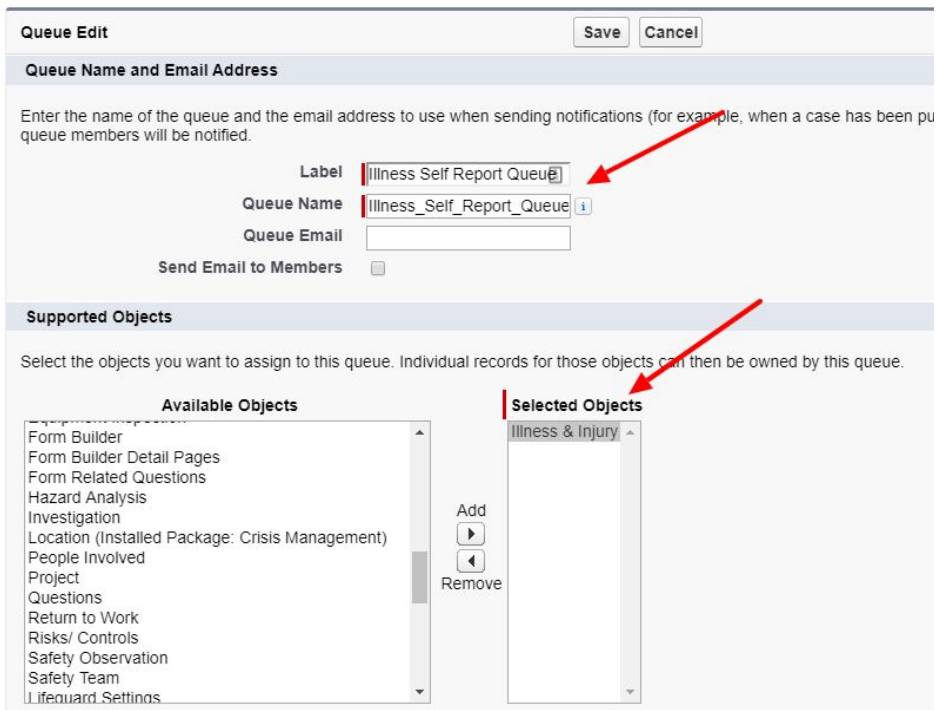
d. Edit the email template if required.



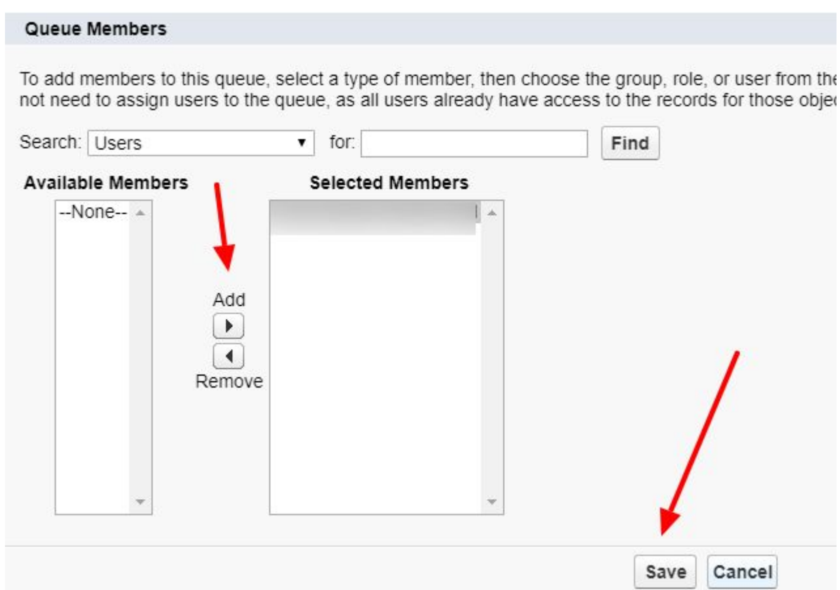
e. Workflow rule CMA Illness/Injury New Record Creation - SITES defaults to email alert the Illness & Injury Owner. We suggest setting up a queue for these. Any Illness & Injury record created externally would be assigned to this Queue would alert members of the queue. From Setup, enter

“Queues” in the Quick Find box, then select Queues. Select New, then complete the Label & Queue Name. Select the Illness & Injury Object.

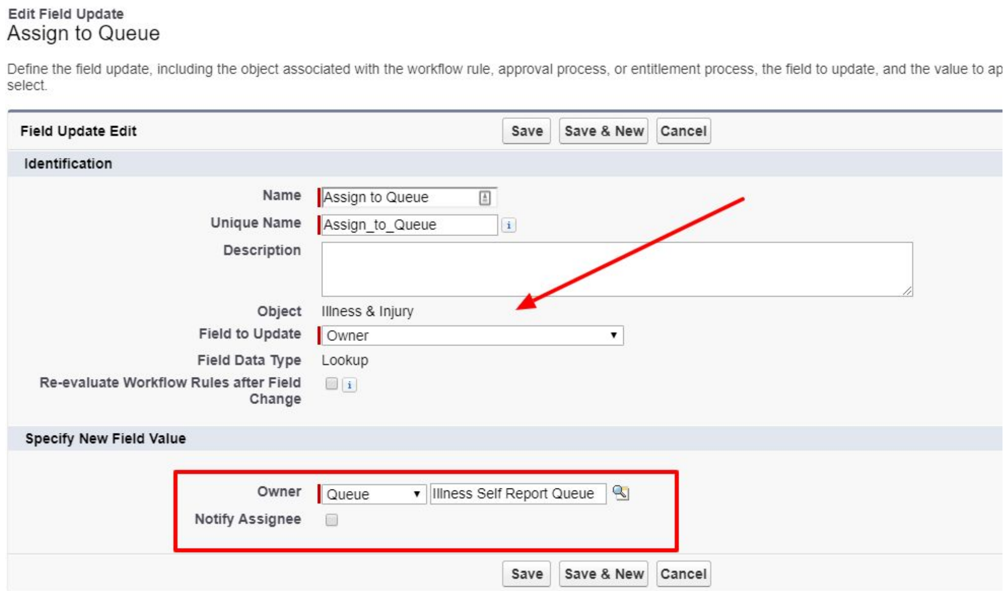
New Queue



f. Then Assign members to this queue. and Save



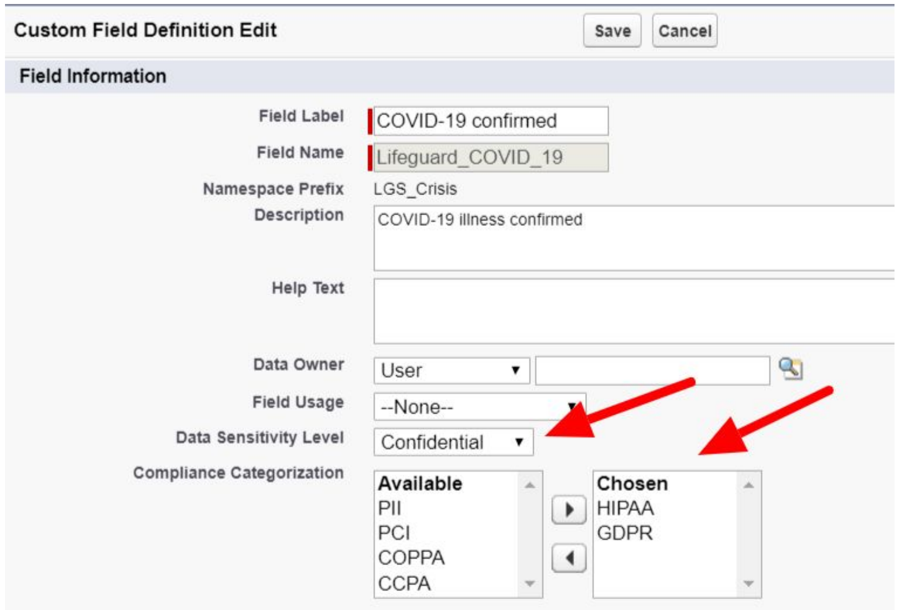
g. Create a field update workflow action to assign the owner to the Illness Self Report Queue.



6. Setup Salesforce Data Classification - recommended

Ultimately, it is your company's responsibility to ensure compliance with any relevant data compliance standard. Salesforce provides the tools to achieve this. Please refer to Salesforce Help.

a. Set a data sensitivity level and the relevant compliance categories.



b. This can be done for any standard, packaged or custom field.

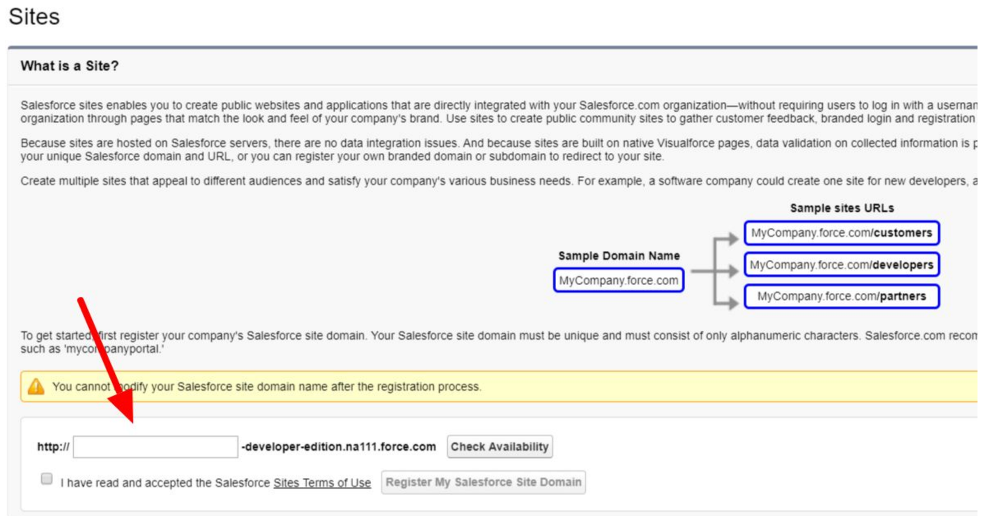
7. Create the Salesforce Sites Self-Report URL - recommended

Provide stakeholders without a Salesforce license the ability to Self Report an Illness or Injury. We recommend that the URL generated is only provided to internal stakeholders to ensure data quality. This form can be completed by anyone with access to this Sites URL. [Refer to Sites documentation](#).

a. If not already done, register My Domain. Although not technically required for Sites it's best practice to have it setup.

b. Within Setup, use Quick Find to locate Sites.

c. Register a Site Domain name. [Refer to Salesforce Help article]() if required.



d. Click "New" in the Sites section of the page to create a new Site.

e. Enter the following;

   i. Site Label - we recommend Self Report

   ii. Site Name - we recommend Self_Report

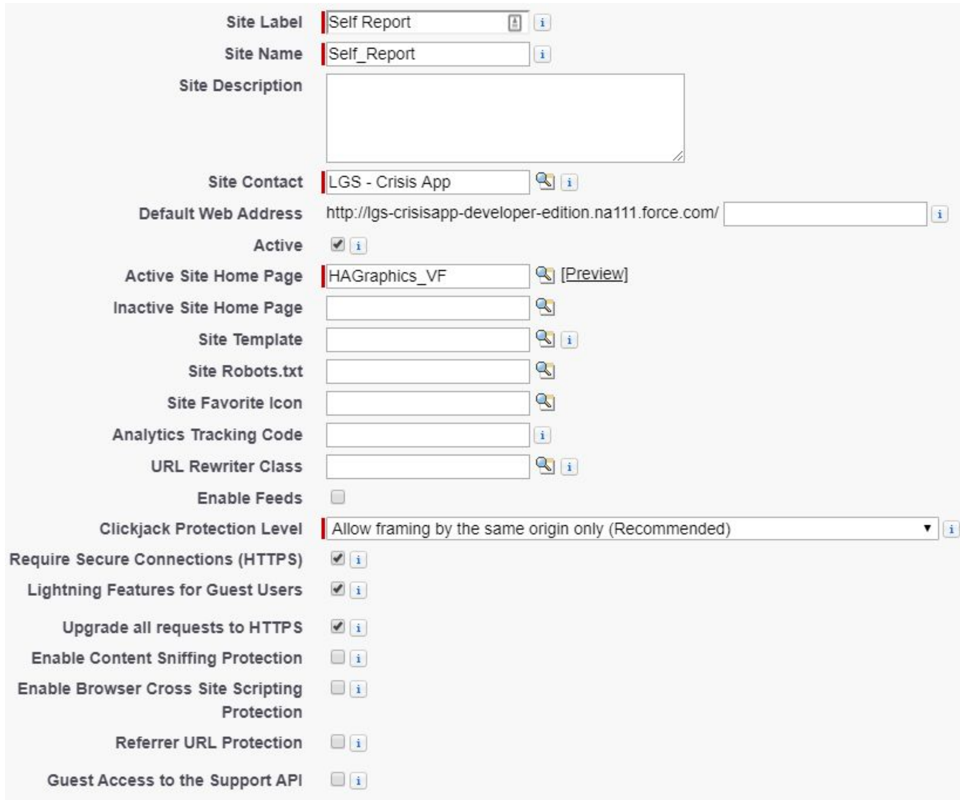
   iii. Site Description -optional

   iv. Site Contact - administrator user

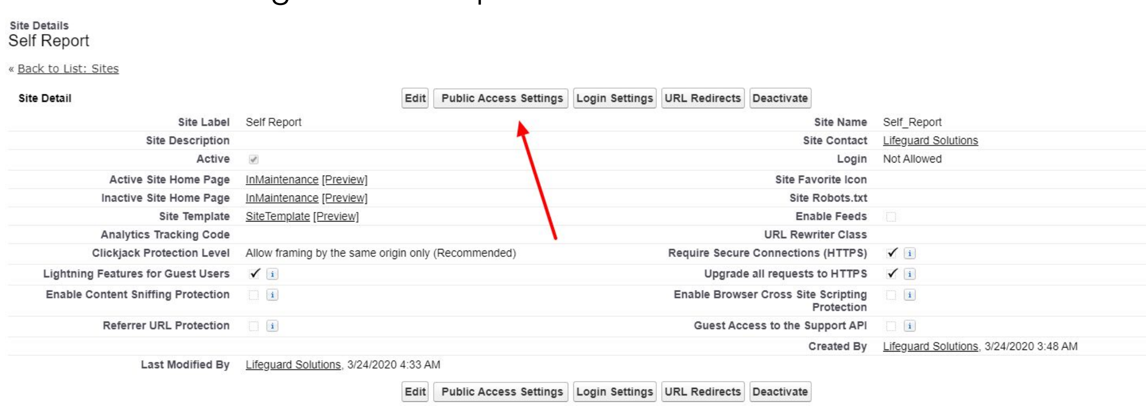
   v. URL suffix in the Default Web Address - optional

   vi. Mark the site as active

vii. Your values should look like the image below. Save the site record.



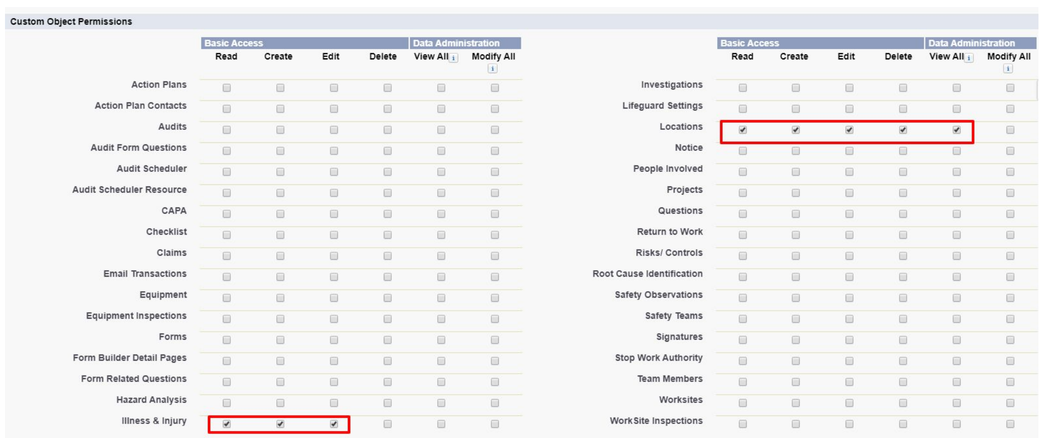
f. Select the site label and then select Public Access Settings. You will be editing the Self Report Profile.



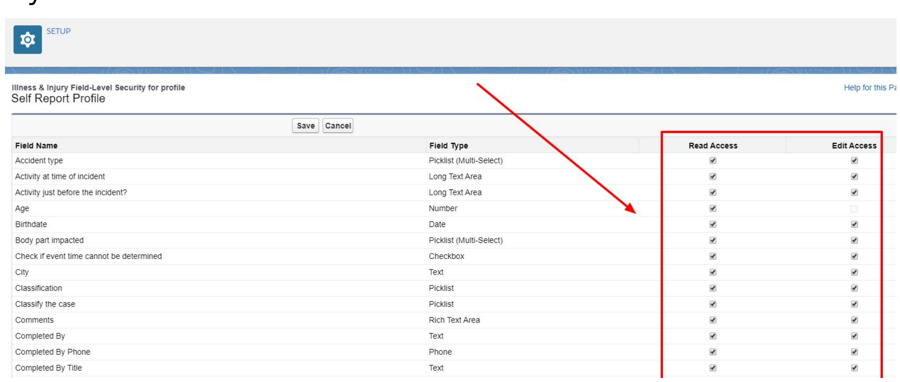
g. Edit the profile and give object permissions to the Illness/Injury & Location objects. Save the profile.

Illness & Injury	Read | Create | Edit
Locations	Read | Create | Edit | Delete | View All

Note: If you have the enhanced profile user interface enabled then you will be able to set the object and field level permissions in one step. View shown below is the standard layout.



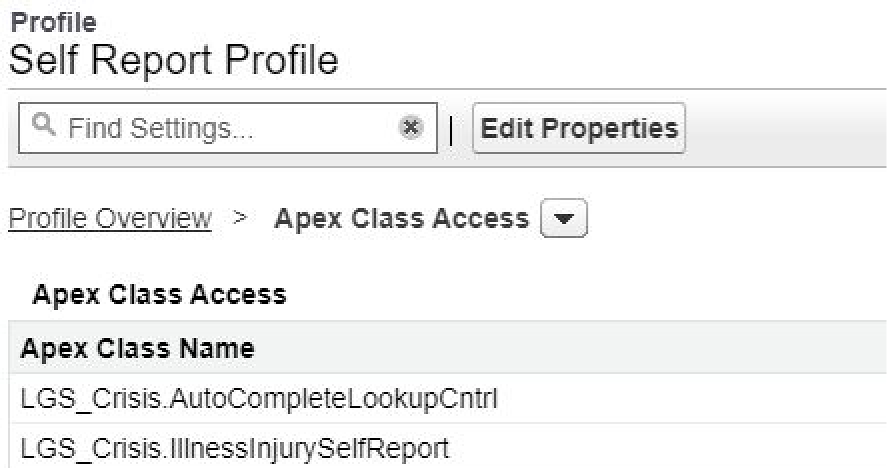
h. Go to the Field Level Security section, view and give read and edit permissions to all the fields for the Illness/Injury & Location objects. View shown below is the standard layout.



i. Go to the Enabled Apex Class Access Section and give Permissions for the following Apex Classes:

   i. LGS_Crisis.AutoCompleteLookupCntrl

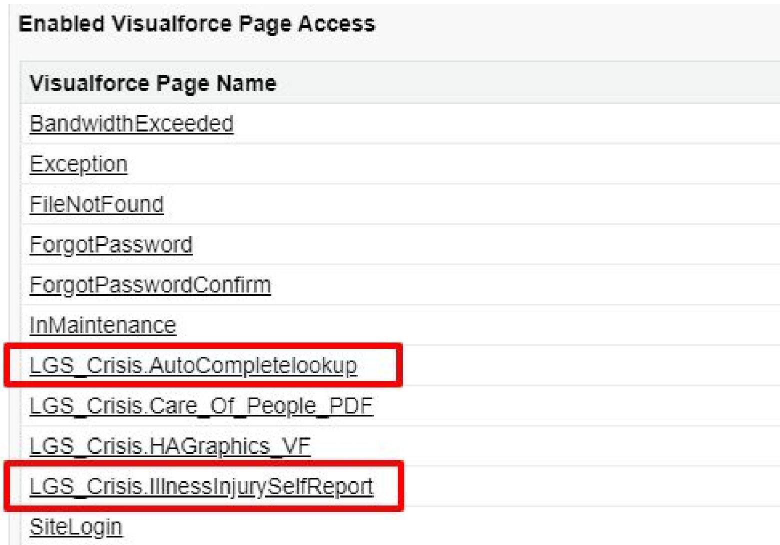
   ii. LGS_Crisis.IllnessInjurySelfReport



j. Go to the Enabled Visualforce Page Access section and give permissions for the following VisualForce Pages:

   i. LGS_Crisis.AutoCompletelookup

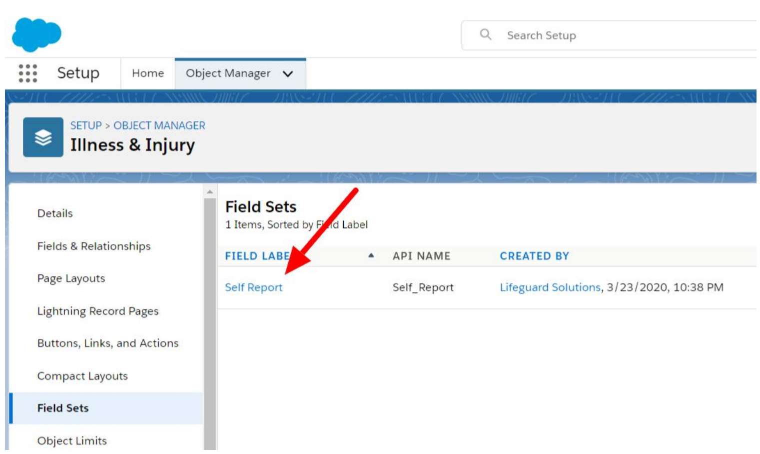
   ii. LGS_Crisis.IllnessInjurySelfReport



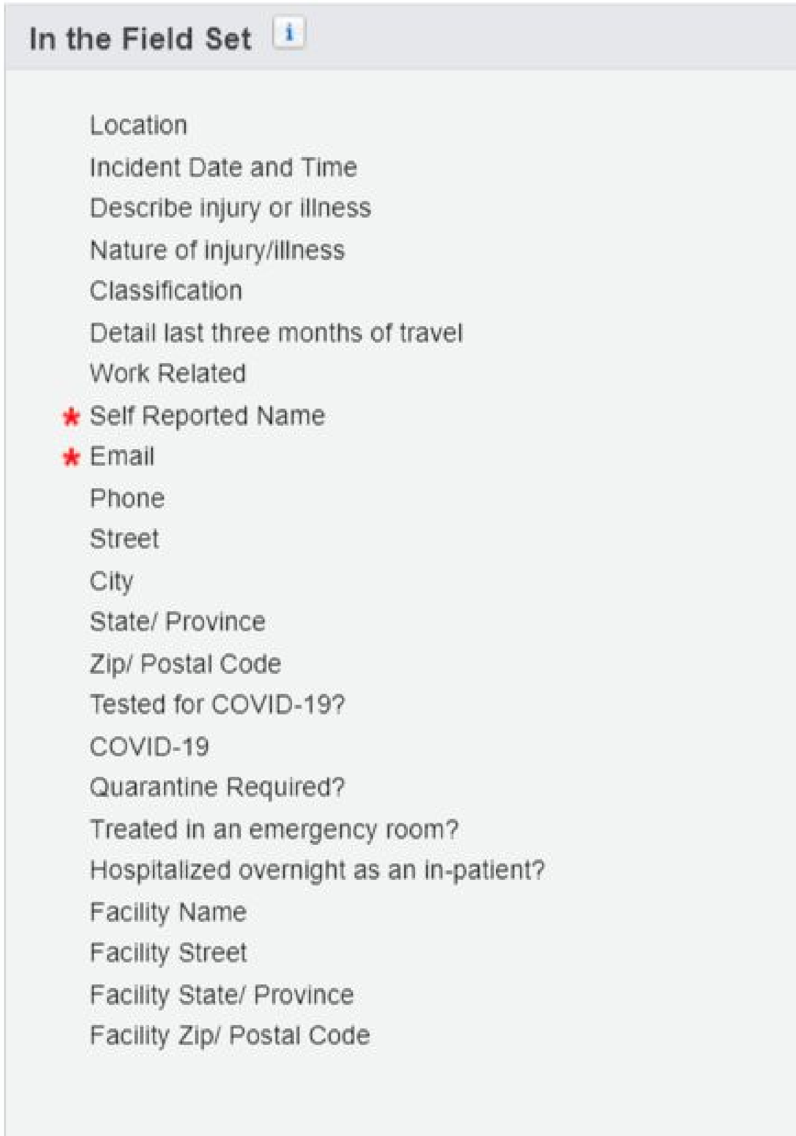
k. Note your site URL. Append /LGS_Crisis__IllnessInjurySelfReport to your site URL for the full link. eg. https://lgs-crisis-developer-edition.na111.force.com/LGS_Crisis__IllnessInjurySelfReport

l. Provide the URL securely to those that need to self report

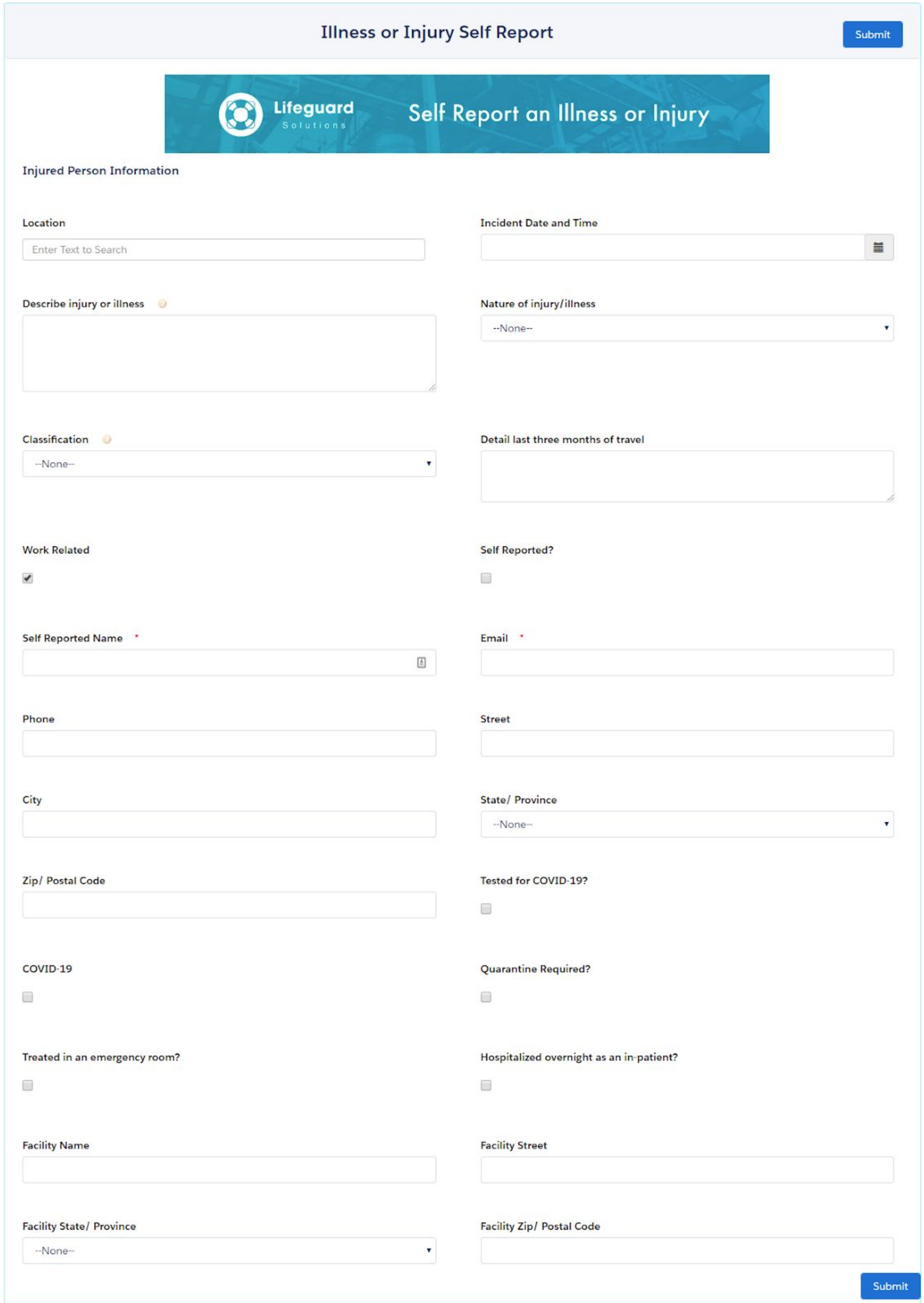
m. If you wish to edit the fields on the layout you can do so via the field set. Navigate to the Illness & Injury object, then field sets.



n. Drag and drop fields and set those that you would like required.



o. Your changes will be reflected in the external self report form.



Illness or Injury Self Report

Submit

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Self Report an Illness or Injury

Injured Person Information

Location Enter Text to Search	Incident Date and Time
Describe injury or illness	Nature of injury/illness --None--
Classification --None--	Detail last three months of travel
Work Related	Self Reported?
Self Reported Name *	Email *
Phone	Street
City	State/ Province --None--
Zip/ Postal Code	Tested for COVID-19?
COVID-19	Quarantine Required?
Treated in an emergency room?	Hospitalized overnight as an in-patient?
Facility Name	Facility Street
Facility State/ Province --None--	Facility Zip/ Postal Code

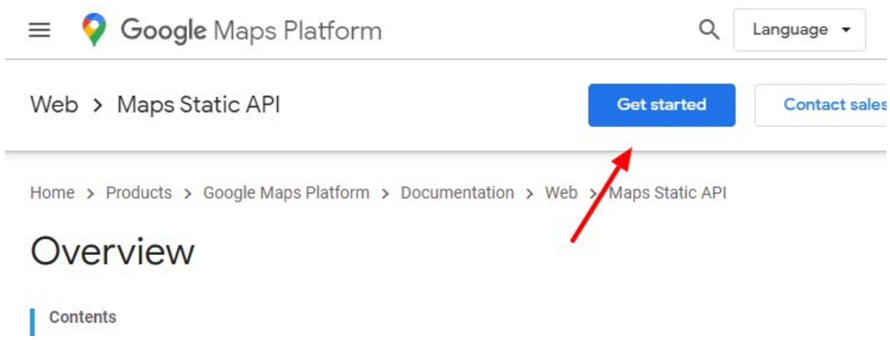
Submit

8. Setup the Google Maps API - recommended

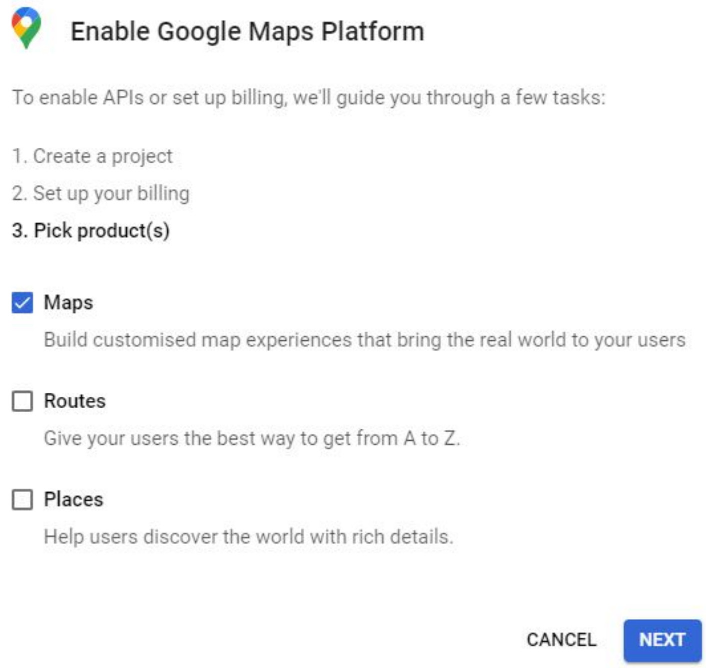
With the Google Apps API setup and integrated, you can see the maps for reported injury/illness and location records. It uses the geolocation fields (GPS Coordinates) in each object and the Google Maps API to display them.

a. [Reference the Google Maps Platform - Maps Static API]()

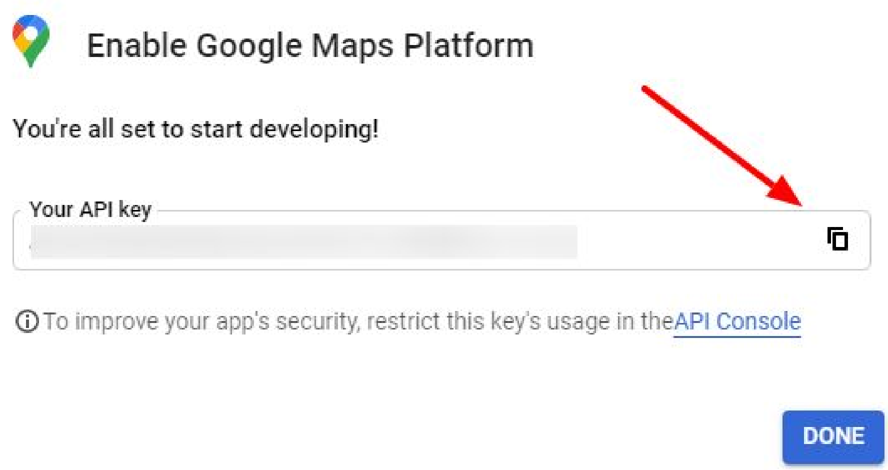
b. Select Get Started



c. Create a project, set up a billing profile and pick the maps product.

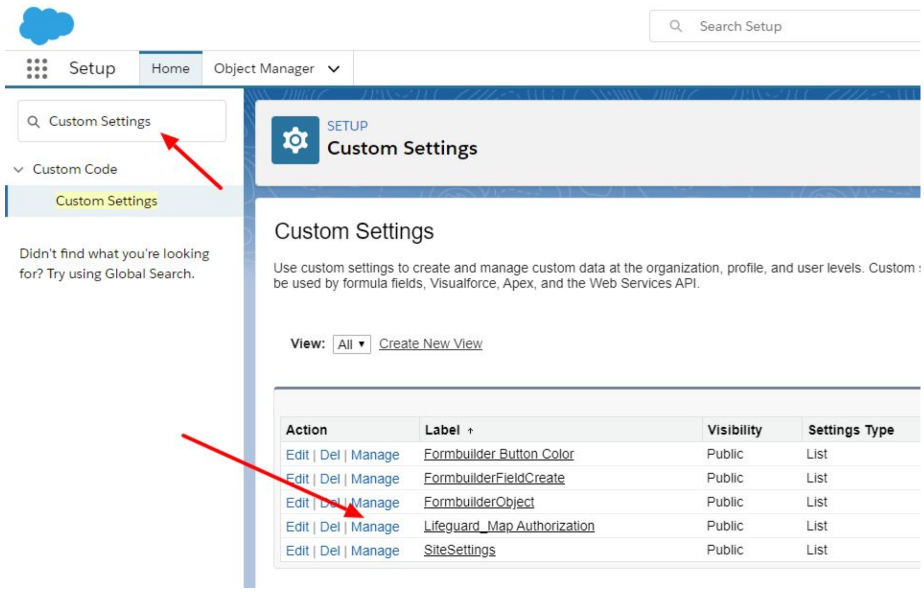


d. Enable the APIs and an API key will be created. Copy to clipboard.

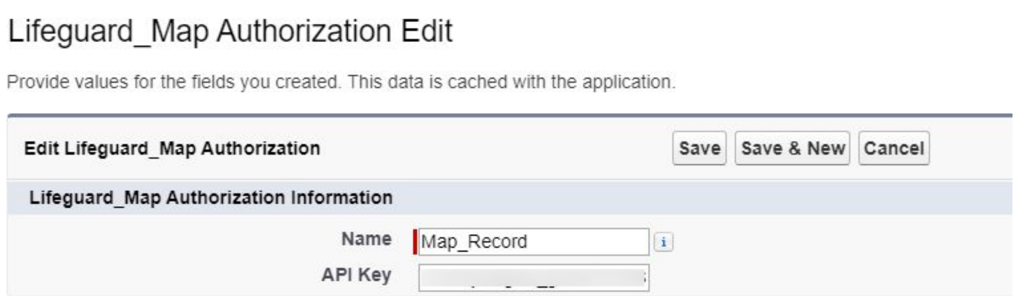


e. From Setup, enter "Custom Settings" in the Quick Find box, then select it. Select Manage for the

Lifeguard_Map_Authorization custom setting.



f. Create a new record and enter Map_Record for the Name. Paste in your API key and Save.

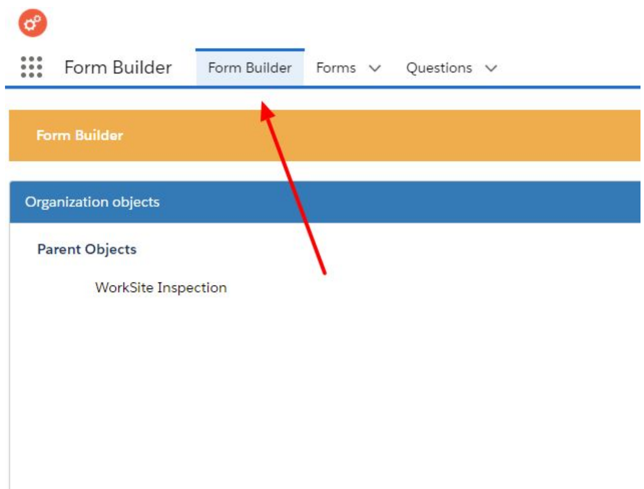


9. Create simple checklists with the Form Builder - recommended

[Refer to the Form Builder guide here.]

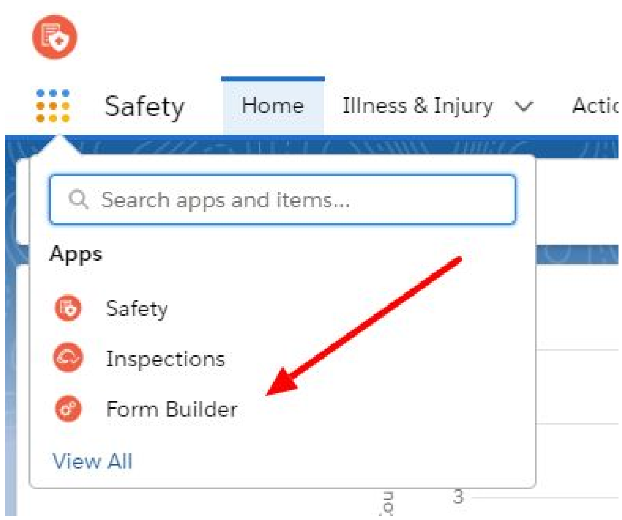
a. Ensure that the Crisis Mgmt Super User has been assigned to any users wanting to create forms (besides a system admininstrator)

b. **Select the Form Builder app from the Quick Launch and click on the Form Builder tab immediately.** This is critical to trigger the setup of all the custom settings.



c. By default, forms can be built and related to the Worksite and Equipment Inspection objects.

d. Navigate to Form Builder app and then the Form Builder tab within.



e. Refer to section III. Creating Forms with Builder in the [Form Builder guide](#).