

KIWI RAIL SHIELD MANAGER/TEAM LEADER GUIDE



**TOITŪ TE
MAURI**

VALUING
OUR PEOPLE



Shield App – Manager/Team Leader Guide

Date: 2nd July 2024

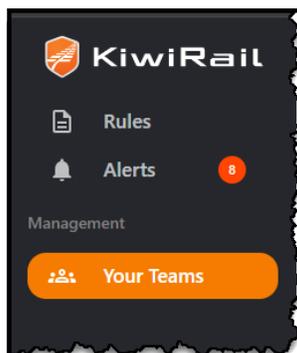
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Introduction to Management in Shield

The Management section in the Shield app allows organisational managers and team leaders to manage teams. This includes the review of Alerts and Messages from team members.



Shield App Guide - Teams - Manager TL



Shield App Guide – “How To” for Managers



Access to Management Functionality

Getting access to the Management section	<p>To get access to the Management section, you must be set up as an organisational manager or as a team leader in the Shield app.</p> <p>FOR KIWI RAIL STAFF:</p> <ul style="list-style-type: none">If you have staff reporting to you in MyKR, you will automatically have access to Your Team <p>FOR NON KIWI RAIL STAFF:</p> <ul style="list-style-type: none">Contact your organisation’s org manager to be set up as an org manager or team leader. (If your organisation does not yet have an org manager set up, contact the Shield app admin (Shield@kiwirail.co.nz) and ask to be added as an organisation manager in Shield)Once you have been granted org manager status, you will be able to create, edit and delete teams. (user Guide will be provided and training if required)
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Definitions – roles and responsibilities	<p>Admin</p> <ul style="list-style-type: none">This is a group in KiwiRail that has the ability to create initial org managers <p>Organisation (‘org’) manager</p> <ul style="list-style-type: none">This role has the ability to create/edit/delete new org managers in their organisation and set up teamsThe org manager also ensures that any exiting employees are off-boarded from the Shield app and any new employees are onboardedWe recommend that each organisation has at least two org managers (cover for leave etc.). Best practice is to have at least one org manager per 250 employees using the app (i.e. for up to 250 employees, have 2 org managers, 500 employees – 3 org managers etc.) <p>Team leader</p> <ul style="list-style-type: none">A team leader is someone that manages teams – either defined through the organisation hierarchy, or as someone that leads teams operationally on a day-to-day basisTeam leaders can view their teams and their safety related status
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Web & Mobile App	<p>MOBILE APP</p> <p>This gives you visibility to most of the same information as is available in the Web App, however for larger teams, this is easier viewed in the Web App. Plus, the download function is NOT available in the Mobile App. You access your team info from the mobile app by tapping the Teams icon at the bottom of the screen. (iPad access is same as for Web App)</p>  <p>WEB APP</p> <p>This app available in a browser is easier to review staff, especially for larger teams. It also allows for downloading a list of staff and which Alerts they have or have not been acknowledged.</p> <p>Web App Link: https://shield.kiwirail.co.nz/</p> 
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Your Teams

This section describes the functionality available in the Your Teams section of the Shield app.

Your Teams

Click/Tap on **Your Teams/Teams**.

Your Team Members will display.

- For KiwiRail staff only – you will see **My Team**, which is replicated from MyKR.
- For all other organisations – you will only see a ‘My Team’ if an Org Manager has created a team and made you a leader for that team or teams.



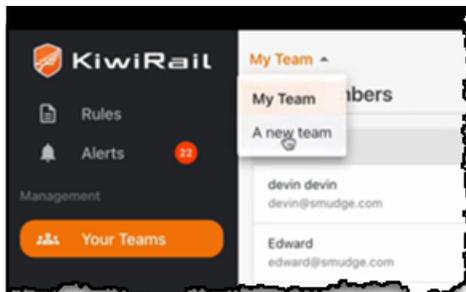
This will display for each team member:

- Name and email address.
- Core Roles
- Alerts – a graphical indicator of where the person is at with acknowledging alerts. The green shows the percentage of alerts that the team member has acknowledged. The number = The number of Alerts NOT acknowledged yet.

Note: If a question mark appears in the circle, the team member is not registered in Shield.

View your other teams

If you are a leader of more than one team, you click on the arrow to the right of **My Team**. Click on a different team name to see the details of that team.



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Alerts

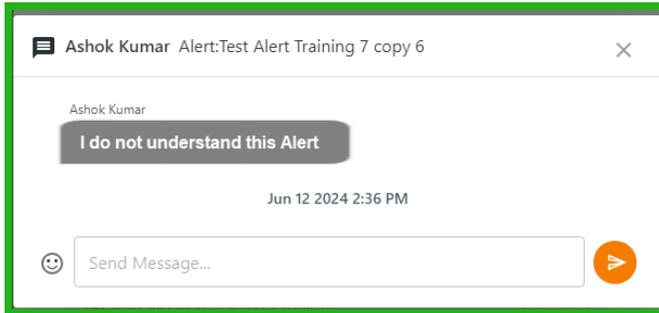
<p>View alert status</p>	<p>Click on a team member's name to view the status of individual alerts they have been sent.</p> <p>If there is a</p> <ul style="list-style-type: none"> • Green tick, they have acknowledged the alert. • Red cross, they have not acknowledged the alert and may not be operating under the latest safety information/practices. This MUST be addressed as soon as possible. 	
<p>Alert messages</p>	<p>If a team member has created a message on an alert, you will see this symbol to the right .</p> <p>If the Indicator has a Dot alongside, you have acknowledged this message.</p> <p>When you click on the indicator, it opens the chat window for that message. You can then reply. Any further message back from your team member will increase the number count against this indicator.</p>	
<p>Manger message indicator</p>	<p>Along side Teamd or Your teams you will se a DOT if there is an un-responded message from one of the team. Click on Teams and then look for the message against your listed team members</p>	





Managers Message

You can tap on the message to open up the message dialogue window so you can respond.



Team Report

You can download a CSV file that contains the status of each team member covering:

- Roles
- Alerts
- Messages
- Data sync



Note: This is not available from Mobile App only Web App.

This report is in the following format:

A	B	C	D	E	F	G	H	I	J
Organisation	Email	Display Name	User Roles	Alert Created At	Received At	Read At	Message Count	Acknowledge At	Last Sync Start Date
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 30	(competent_traction_person,hand,signaller,addressee,rail_person	26 April 2024 at 3:06:15 pm	2 May 2024 at 11:17:36 am	13 May 2024 at 12:15:32 pm		13 May 2024 at 12:15:36 pm	23 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 7 copy 15	(competent_traction_person,hand,signaller,addressee,rail_person	26 February 2024 at 2:18:02 pm	25 March 2024 at 2:30:06 pm	25 March 2024 at 3:09:39 pm		25 March 2024 at 3:09:40 pm	21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 7 copy 12	(competent_traction_person,hand,signaller,addressee,rail_person	22 February 2024 at 9:28:02 am	25 March 2024 at 2:30:07 pm	4 April 2024 at 7:36:46 pm		4 April 2024 at 7:36:46 pm	21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 7 copy 9	(competent_traction_person,hand,signaller,addressee,rail_person	20 February 2024 at 4:38:02 pm	25 March 2024 at 2:30:07 pm	11 April 2024 at 10:22:23 am		22 April 2024 at 9:17:05 am	21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 2 - Train Controller	(competent_traction_person,hand,signaller,addressee,rail_person	23 November 2023 at 9:38:03 am	25 March 2024 at 2:30:06 pm	25 March 2024 at 3:09:29 pm		25 March 2024 at 3:09:31 pm	21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Test Alert Training 13	(competent_traction_person,hand,signaller,addressee,rail_person	21 May 2024 at 10:44:01 am	14 June 2024 at 8:51:23 am				21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 7 copy 21	(competent_traction_person,hand,signaller,addressee,rail_person	6 March 2024 at 9:10:02 am	25 March 2024 at 2:30:07 pm	22 April 2024 at 9:16:47 am		22 April 2024 at 9:16:48 am	21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 7 copy 25	(competent_traction_person,hand,signaller,addressee,rail_person	12 March 2024 at 9:48:02 pm	25 March 2024 at 2:30:06 pm	25 March 2024 at 9:17:38 pm		22 April 2024 at 9:16:36 am	21 June 2024 at 8:44:27 am
KiwiRail	ashok.suriyanaranan@kiwirail.co.nz	Alert:Test Alert Training 7 copy 1	(competent_traction_person,hand,signaller,addressee,rail_person	15 February 2024 at 11:32:02 am	25 March 2024 at 2:30:06 pm	25 March 2024 at 10:10:30 am		25 March 2024 at 3:09:34 pm	21 June 2024 at 8:44:27 am

Column explanations:

- Organisation – KiwiRail or similar
- Email - Team members email address associated with Shield
- Display Name – Name of Alert
- User Roles – Core Roles
- Alert Created At – Date and Time Alert created/Published
- Received At – Date Team members Device received the Alert
- Read At – Date Time Team Member opened the Alert
- Message Count – Number of messages created against this Alert
- Acknowledge At – Date time Team member Acknowledged the Alert
- Last Sync Start Date – Last Date time team members device started a sync (Denotes last time Shield opened with a data connection - so able to receive updates and Alerts)



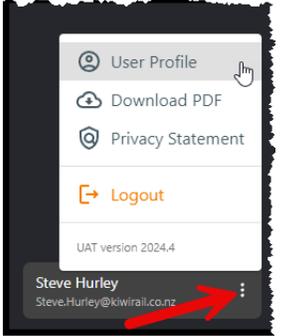
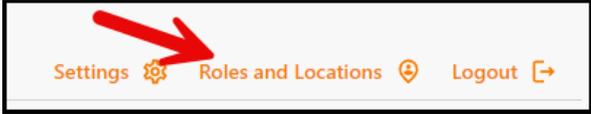
Shield App Guide – “How To” for Managers



Rules Identity System & Managing Staff Roles

This functionality is NOT available to KR Managers in the current release of Shield as the relationship of Staff to Manager is fed from MyKR. KR managers will need to ask staff to update their own roles. A more sophisticated capability in this space is scheduled for Phase 2, post July 1st.

Non KR Teams are setup by their Org Manager and are allocated Org Managers access for their Team.

<p>Rules Identity System</p>	<p>A manager can access and manage a team members Core roles in the Rules Identity System (RIS). This is quite separate to Shield. It can be accessed via your user profile in the Shield Web App or direct.</p> <p>From the Web App: Step 1. Click the 3 dots alongside your name Step 2. Click User Profile Step 3. Click Roles and Locations Step 4. Click Manage Account This open RIS.</p> <p>You can access RIS direct with this link: https://ris.powerappsportals.com/</p>	  
<p>Managing Roles</p>	<p>Once you are in RIS, select the staff member. You can add and remove roles the same as for yourself.</p>	





KiwiRail 