# Customization of SOPA Sites

In all but the simplest cases, companies conduct their BBS programs a little different from each other; in fact even within the same company, different safety steering committees may have different preferences as to how SOPA should be set up.  Early on, we learned that one size does *NOT* fit all! Over the years, SOPA has become more flexible so that we can deliver a product that matches the way each company is organized and the support they need for their safety efforts.  Customizations can affect the whole company's SOPA system, or just the committee domain level (including specific checklists).

## Customization at the Company Level

There are two types of customization that apply to the whole company: "setup parameters" and "aliases".

**Setup parameters** (we techies call them application variables) apply to the whole company.  For instance, there is one parameter called "default language", which might be set to "English." (Individuals can have their own language preference which overrides this: Maria might prefer to see the site in Spanish, even though the bulk of her co-workers speak English.)    Another example is "count only trained" which means that the percent participation statistic uses only the trained population to compute headcount.  There are about 30 such setup parameters that we can use to tailor the SOPA service to the client.

**Aliases** are usually synonymous terms for the same SOPA construct.  For example, the bottom layer of the four-tier hierarchy for larger companies is called "Committee" by default, but it can be called "Site" if that's the term the company uses.  Or the term used to talk about things that need improvement is usually "Concern" but some companies prefer the term "At Risk."

But there's a different way that Aliases are useful.  When we model a company

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and its safety operations, we sometimes have to commandeer SOPA constructs that aren't being used, and give them an alias. One that is commonly available to us is the SOPA entity 'Shifts' which is sometimes not used by a new client, but we need it for a different purpose. We might assign an alias of 'Business Units' to SOPA's Shifts since there's not a built-in entity called Business Units.

## Customization at the Committee Domain Level

There are a few parameters that just affect the Committee Domain (or "site"), although many others apply to the Checklists used by the Domain. **Policies** are where you control some of the parameters that determine SOPA's actions. They apply to the entire committee domain (and there can be Policies that apply to other management oversight levels). In *SOPA Observer #1*, we talked about Policies that are used in the Recognition process. Those help identify the "recognition events" and the corresponding rewards. They account for most of the Policies.

But there are several other Policies that determine:

- whether you use a 12-hour or 24-hour clock,
- whether weeks start on Sunday or Monday,
- whether you allow more than one observation per day even when they may be redundant (i.e. someone has already entered an observation but it is entered again),
- the criterion for observations in a month.

## Customization of an Individual Checklist

Most customizations at the site level are implemented on the individual checklist. That gives the most flexibility for conducting observations a different way for different locations and purposes of the checklists. These decisions apply to checklists:

- **Maximum number of observers.** What is the maximum number of observers from this Site's domain who might participate in one Observation?
- **Guest observer.** In addition to providing observer names from the local pool of observers, you may allow guest observers representing another Site or another area of the plant. Do you want to reserve slots on the header of this checklist to identify a guest observer? (Guest

observations will be discussed in an upcoming *SOPA Observer*).

- **Feedback Given.** Would you like to include a checkbox on the data entry form (checklist) next to each behavior so that you can identify which behaviors have been given attention by the observer?

- **Frequency or All-or-None?** Do you intend for observers to count each occurrence of a behavior during the observation period, or simply note whether practices were generally safe or reasons for concern? (The great majority of checklists in SOPA use All-or-None, with a simple checkmark in either the Safe or Concern column, but some need to count the actual number – particularly in cases where more than one employee is observed at the same time.)

- **n/a or blank?** If there are no occurences of "safe" or "concern", do you want to instruct your observers to mark that column "n/a" or just leave it blank? (SOPA does not store n/a. Internally, it just means that no observation of that behavior occurred.)

- **"Safe" term for column heading**. Do you want to label the positive data column as Safe or something else? It also asks for the alternative term.

- **"Concern" term for column heading**. Do you want to label the negative data column as "Concerns" or something else? It also asks for the alternative term.

- **Department Observed**. Do you want the checklist to have a place to record Department Observed, if more than one Department has been defined for this Site?

- **Locations Observed**. Do you want the checklist to have a place to record Location Observed, if more than one Location has been defined for this Site?

- **Shifts Observed**. Do you want the checklist to have a place to record Shift Observed, if more than one Shift has been defined for this Site?

- **Teams Observed**. Do you want the checklist to have a place to record Team Observed, if more than one Team has been defined for this Site?

- **Coaching?** Do you want to enable this checklist as a coaching checklist, and ask for the name of the coach?

- Recall that in *SOPA Observer #2*, we talked about having as many as four "**general comments**" (GC) fields on the checklist. Policies are where you give names to these fields. If a field is left blank, that GC

field will not appear on the checklist.

> *The Pre-Setup Questionnaire we provide as we get you started is very important – it tells us how to configure the setup parameters, aliases, policies and checklists, which together determine how the SOPA site will work.*