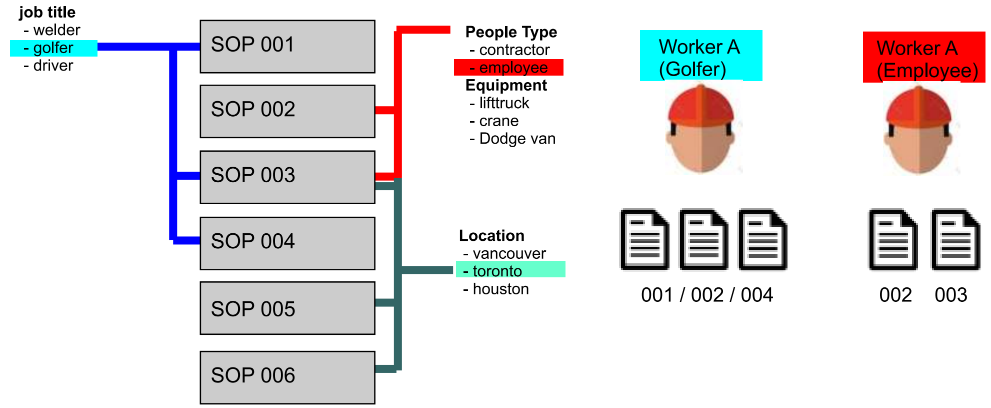
2018.03.26 review of BPCI module design



Focus:

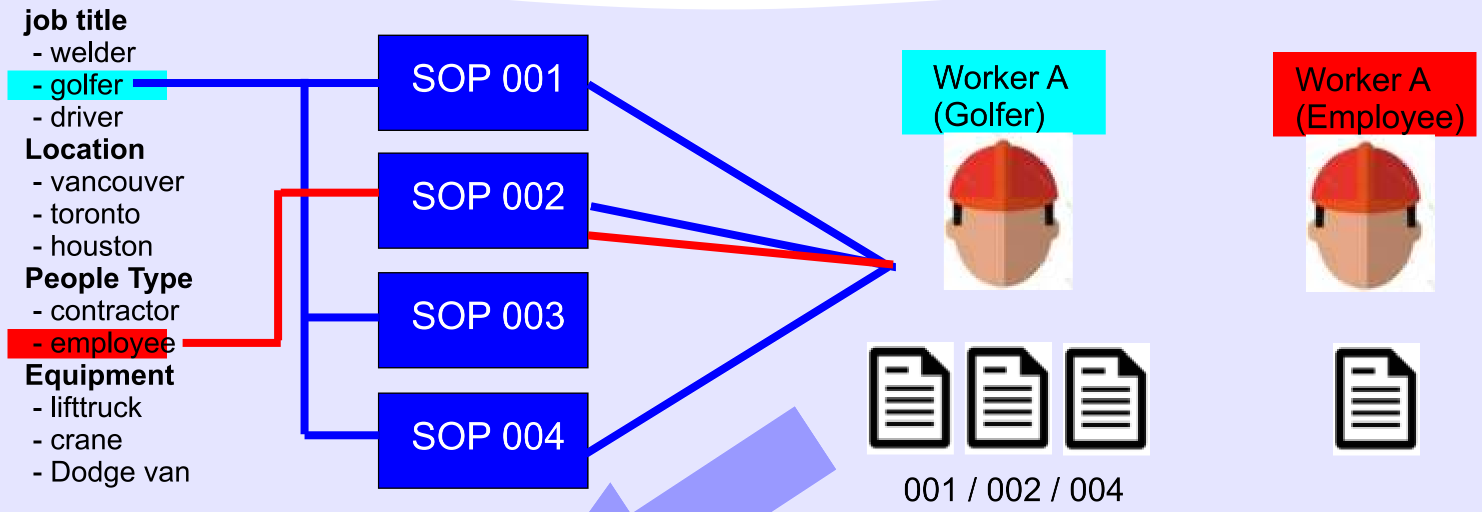
- properties of BPCI’s
- assignment
- delivery
- acknowledgment input - worker or SPV/WTL
- innovation fields
- reporting / escalation
- alerting

questions
- practical demo scheduling
- observation by video body camera? store?
- workable by email addresses for sale outside ST?
- contractor training/compliance/verification by camera
- inspections???? create checklists, how to save details

ASSIGNMENTS

Documents are assigned via the BPCI module assignments page.

Students get BPCI based on their job title, people type, Loc/Dept, WT, or individual assignment.



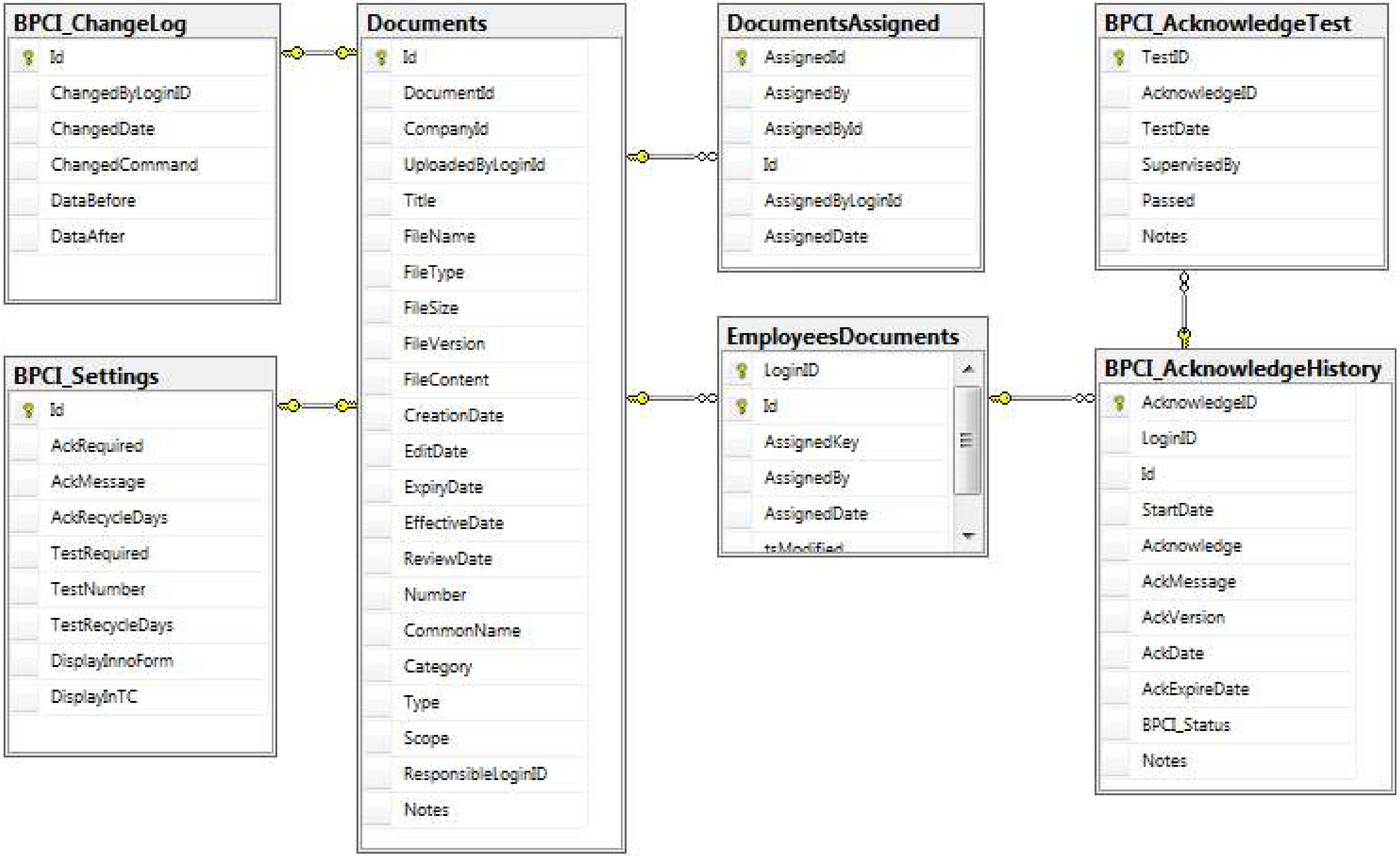
BPCI 's only appear in a new TC tab and are not treated as a course.

1 Alert sent to all assigned workers to login and review/ acknowledge in the Training Center

OR

2 Alerts sent to SPV/WTL only who uses ‘Add Scores’ page to enter completions for workers. I added a ‘practical test’ checkbox field to the dbase. Only a SPV or WTL should be able to access this field on forms to confirm the student has completed a practical test. A document should be available to the supervisor who may want to upload it attached to the student record. This would be a checklist form of the items the student demonstrated.

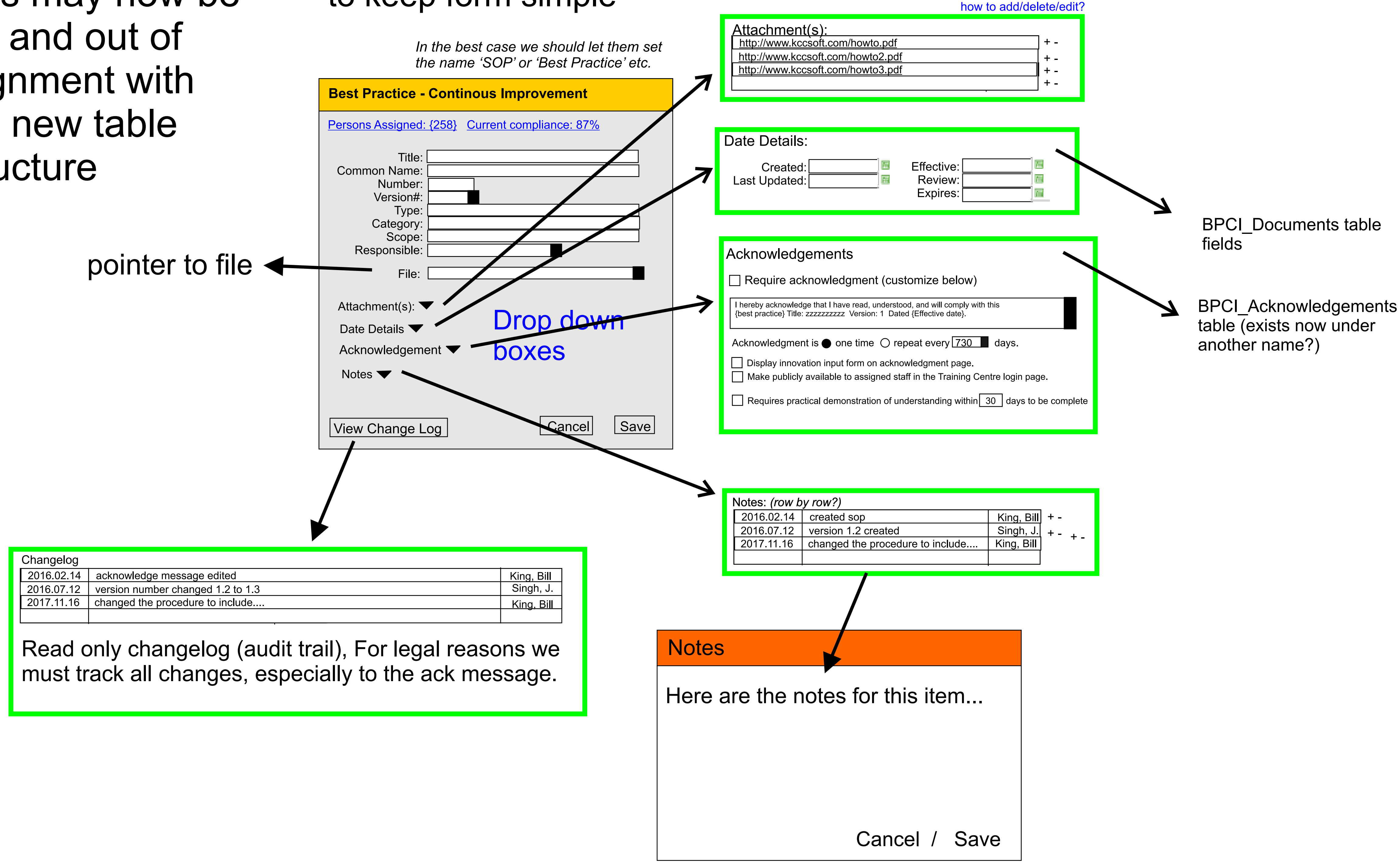
See next page



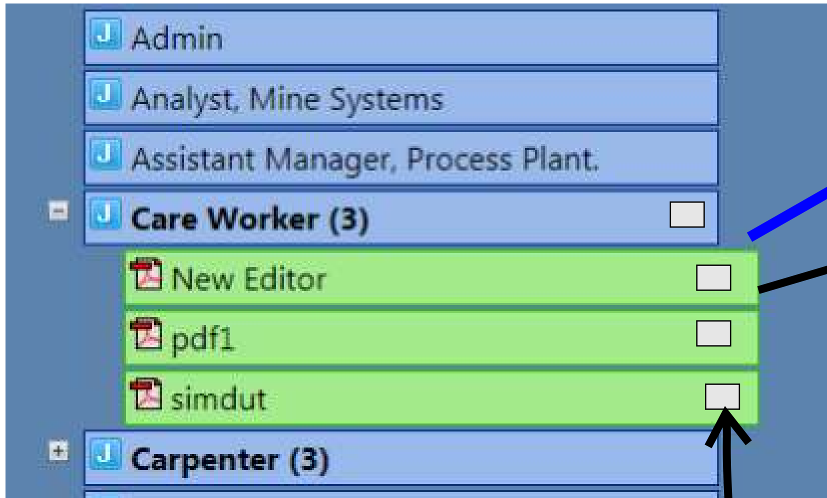
2018.05.31 some ID field names to change, two more tables may be needed in the future to hold custom movies and quiz items.

This may now be old and out of alignment with the new table structure

Use drop down boxes to keep form simple



Simpler method all due at once



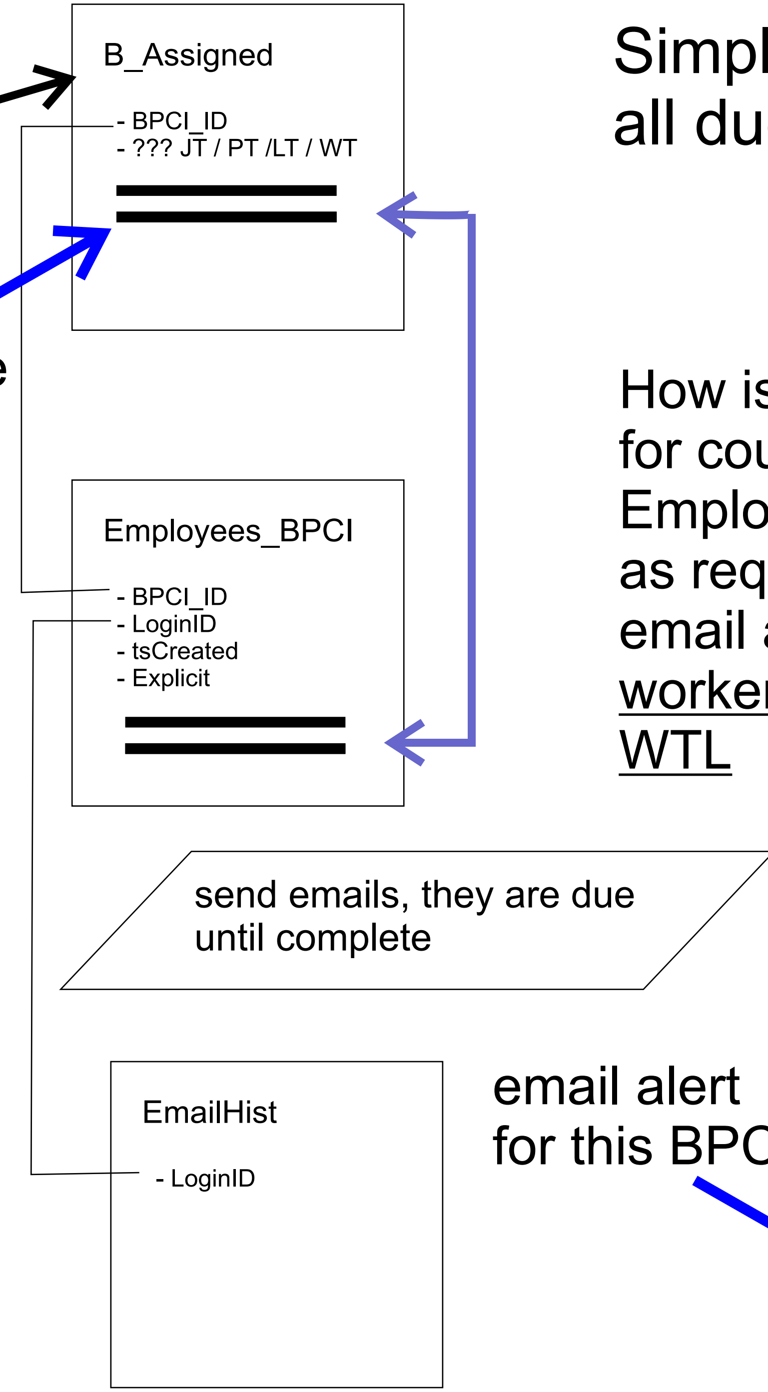
due today

Add a new date field for future possible use

no pauses between, all are due now, but maybe are sequenced

email alert for this BPCI

what happens if there is a 'recycle' on these items, like 365 days? All dates would have to be recalculated



How is this handled for courses? insert into Employees_BPCI then as required create email alerts for <u>either workers and/or SPV or WTL</u>

email alert for this BPCI

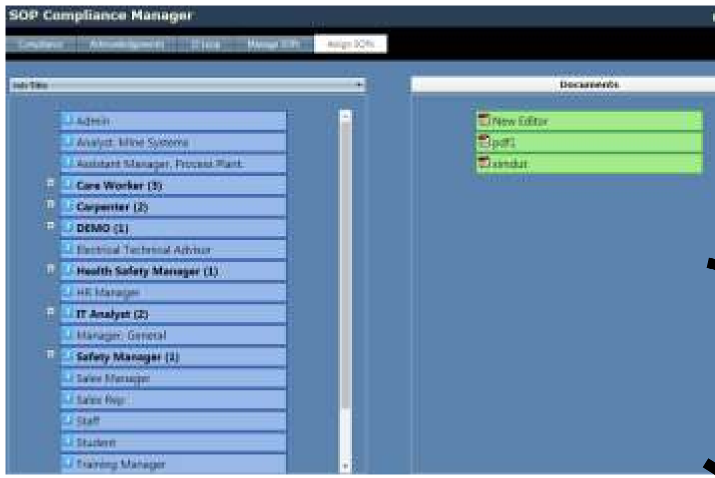
simpler method, all are assigned at once and due at once. The manager gets an accurate report of 'due' and compliance. The user could do all items the same day (not good).

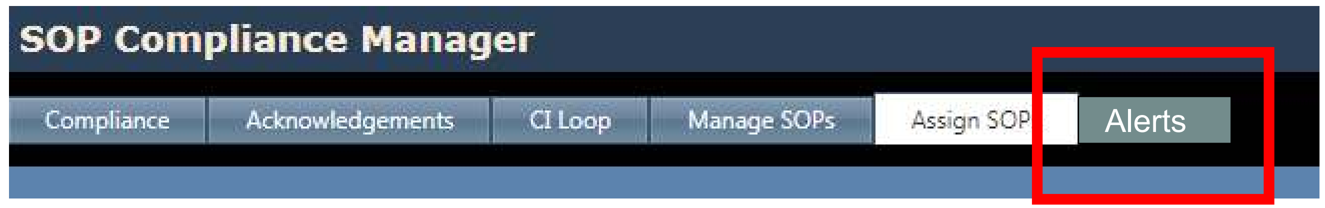
Documents upload form. Modify form to upload BP and documents using the same fields.

PDF upload

type = document - attach to some object, these items can be assigned in the normal assignments page and may appear in a TC tab but do not get acknowledged or show innovation functions. They open on their own.

type = BPCI - appears in BPCI module for assignment, alerting, compliance, assigned from the BP manager, may require acknowledgment. They open in an HTML template and may have acknowledgment function on. In the future they may be assigned to courses.





Let's add a new tab for 'Alerts'. Then show the alerts on the screen with customizable messages.

On assignment alerts:

See the next page for alerts. It would be good to have a manual method or button here to be able to edit a message then send.

?

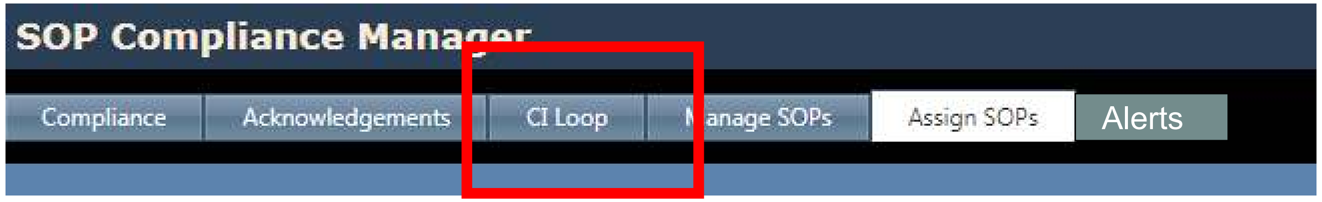
DECISION: SEND TO EITHER SPV/WTL's OR Workers

Alert to SPV or WTL contains a list of persons assigned to an BPCI(s). SPV or WTL is expected to present the BPCI then 'add scores' to record compliance. How can we get a statement of compliance from each? Signature? Or they input their personal password?

Contains a link to open the U2C / BCPI.

Alert to workers contains a link to login and run the U2C that contains the BPCI(s). The worker is expected to acknowledge the BPCI.

Click here to open/review BPCI #455 Welding Fumes



Current Design Issues and quesions 20180531:

- automatic alerting on ‘assigned’ - send to SPV/WTL or Workers?
- The CI loop - was meant for innovations. What to do with it now? Hide it? It is good for marketing.
- for SPV/WTL group acknowledgment input, the ability to take a picture of the group might be effective (as well as a signature panel)

Alert to SPV or WTL contains a list of persons assigned to an BPCI(s). SPV or WTL is expected to present the BPCIthen 'add scores' to record compliance. How can we get a statement of compliance from each? Signature? Or they input their personal password?

Contains a link to open the U2C / BPCI

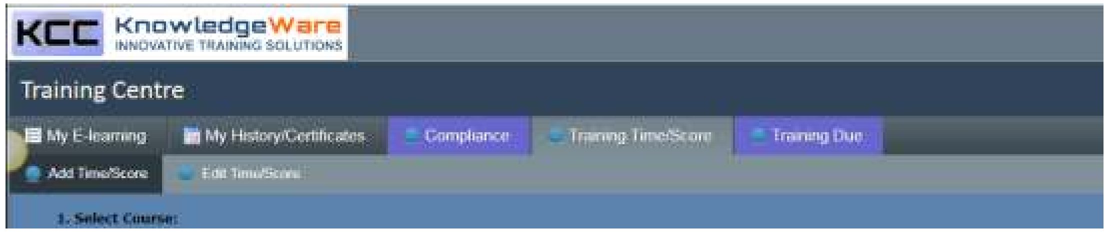
Alert to workers contains a link to login and run the U2C that contains the BPCI(s). The worker is expected to acknowledge the BPCI

Click here to open/review BPCI #455 Welding Fumes

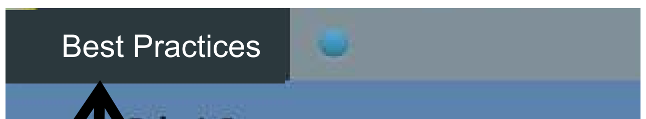
We need to add a BPCI's tab to 'add scores'

We need to test it thoroughly on smart phones

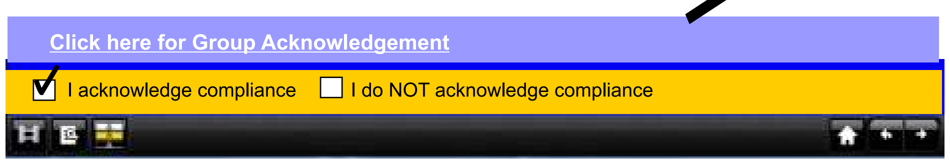
SPV / WTL input step:



I'm still thinking about this, but I think it may be best to have a separate tab called 'Best Practices' so we can keep this separate from training.



Lists BPCI's like courses. In the BPCI an acknowledge bar appears at the bottom for everyone (if turned on). If the logged in user is a SPV/WTL another blue band appears for 'Group Acknowledgement'.



Color coding: either acknowledged, expiring<90, non-acknowledgement

BPCI 443 Welding Fumes v1.1 2018.04.02

(read only Acknowledgement message)

I acknowledge I have read and understood and will comply with....

		Name	LoginID	Last Ack.	By	✓ Practical
✓	☐	+ Ron Ramsey	4342	2018.02.03	Ron Ramsey	2018.02.03
	☐	+ Javier Martinez	9989d	2016.07.13	George Dan WTL	2018.02.03
	☐	+ Bill Poole	8878	2012.04.02	Bill Poole	--------------
	☐	+ Roger Whittaker	98989	---------------		
	☐	+ Harry Leman	443	---------------		
✓	☐	+ Suzy Snow	snows	2011.09.22	Suzy Snow	2018.02.03
✓	☐	+ Laura Pickering	1917	2017.03.12	Roger Shaw SPV	-------------

- ☐ Ron Ramsey 4342

Signature Panel: (convert to jpg image)

☐ Practical demonstration completed 2018.04.19

Notes: zzzzzzzzzzzzzz zzzzzzzzzzzzzzzzzzzzz

Verified by: {supervisor name/loginID}

Cancel | Save

The SPV/WTL would typically just check the checkbox here and it will autosave.

If desired, he may open the drop down to record a signature (how to input?) in jpg format, check the practical demonstration checkbox and (autoinsert) date, and to add any ‘notes’ which could be legally important (id the worker did poorly on using the equipment)

only shown if turned on in BPCI table

Color coding: either acknowledged expiring<90 non-acknowledgement

BPCI 443 Welding Fumes v1.1 2018.04.02

(read only Acknowledgement message)

I acknowledge I have read and understood and will comply with....

Name	LoginID	Last Ack.	By	√ Practical
+ Ron Ramsey	4342	2018.02.03	Ron Ramsey	2018.02.03
+ Javier Martinez	9989d	2016.07.13	George Dan WTL	2018.02.03
+ Bill Poole	8878	2012.04.02	Bill Poole	-------------
+ Roger Whittaker	98989	---------------		
+ Harry Leman	443	---------------		
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+ Laura Pickering	1917	2017.03.12	Roger Shaw SPV	-------------

- ☐ Ron Ramsey 4342

Signature Panel: (convert to jpg image)

☐ Practical demonstration completed 2018.04.19

Notes: zzzzzzzzzzzzzz
zzzzzzzzzzzzzzzzzzzzz

Verified by: {supervisor name/loginID}

Cancel

Save

For simplest use the form would just look like this, with the SPV / WTL checking the checkboxes.

Note: they may just do this on the delivery of the BPCI but the practical demonstration is scheduled / alerted for a later date (30 or 90 days, etc.).

If they check the acknowledgement it will go green. But if it requires a practical, the checkmark will not appear until the practical is done.

So we really need two levels of alerting, when due for the BPCI and until acknow., then another alert when the practical demo is due.

The SPV/WTL would return to this form and open up the detail panel and insert the practical demonstration date/time, at which time the checkbox on the green box appears.

acknowledged but practical test not complete

Color coding: either acknowledged expiring<90 non-acknowledgement

BPCI 443 Welding Fumes v1.1 2018.04.02

(read only Acknowledgement message)

I acknowledge I have read and understood and will comply with....

		Name	LoginID	Last Ack.	By	✓ Practical
	✓	+ Ron Ramsey	4342	2018.02.03	Ron Ramsey	2018.02.03
	✓	+ Javier Martinez	9989d	2016.07.13	George Dan WTL	---------------
	☐	+ Bill Poole	8878	2012.04.02	Bill Poole	---------------
	☐	+ Roger Whittaker	98989	---------------		
	☐	+ Harry Leman	443	---------------		
	✓	+ Suzy Snow	snows	2011.09.22	Suzy Snow	2018.02.03
	✓	+ Laura Pickering	1917	2017.03.12	Roger Shaw SPV	---------------

*I, Bill King, Supervisor, verify by clicking 'Submit' below that the persons checked above have been informed of and have indicated to me their understanding of **BCPI 443 Welding Fumes v1.1 2018.04.02** and their intention to comply fully with the information contained within.*

4 acknowledgements submitted by Bill King 2018.04.30 3:31PM

Cancel Submit

This message would have to be adjustable by the company.

The practical column and checkbox does not appear if not turned on

Acknowledge - loginID / workstation / inputBy / DT / SOPID / SOPName / Version / Expires / NextDue / BiometricID / Notes?
*notify manager somehow if notes added

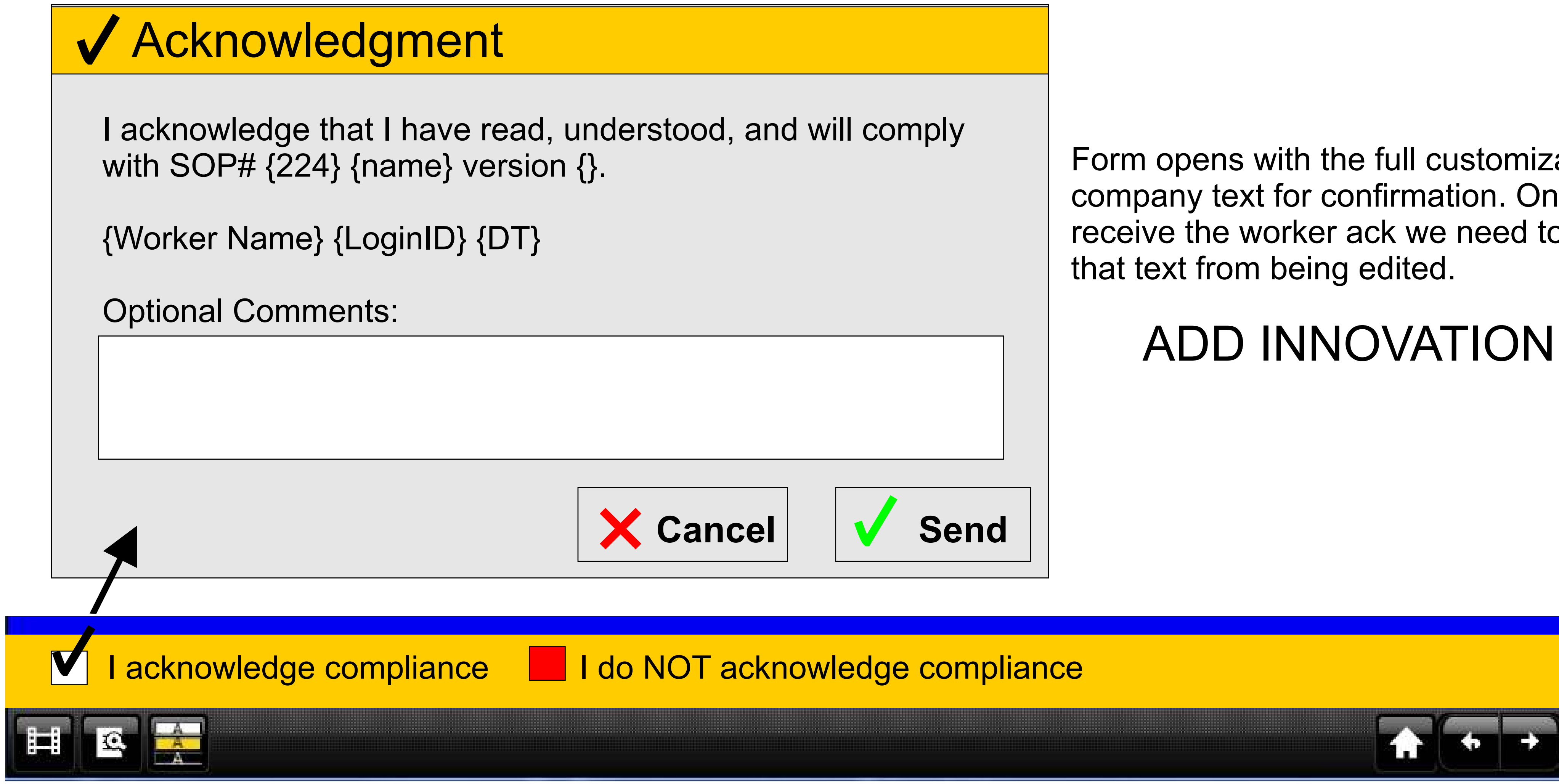
There can be three responses:

Acknowledged
No response (waiting)
Non-acknowledgment (refusal)

Do we do anything if the worker just doesn't click either? He/She will still be 'due'.

Need practical test version for SPV/WTL

use video upload?

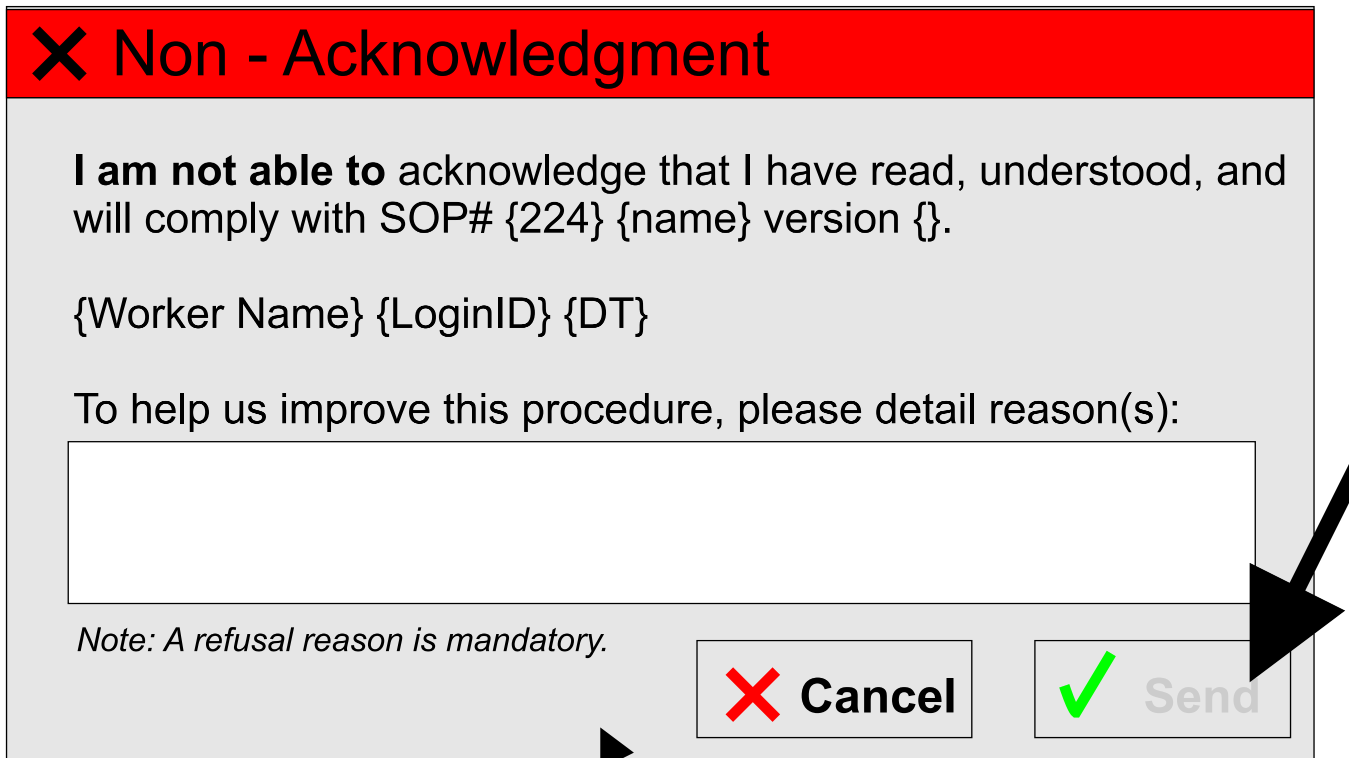


Form opens with the full customizable company text for confirmation. Once we receive the worker ack we need to keep that text from being edited.

ADD INNOVATION

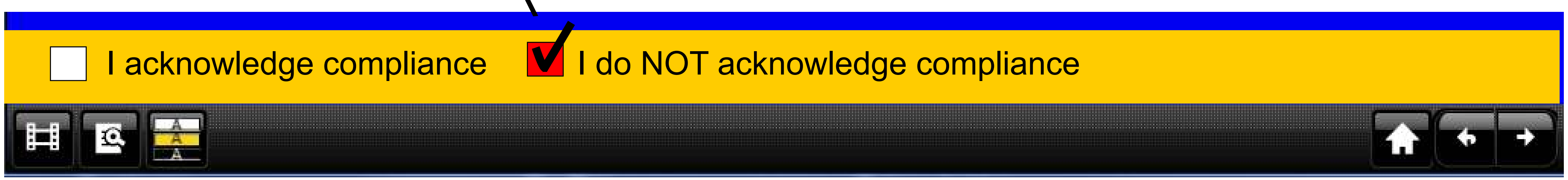
Should be radio buttons by standards, but mutually exclusive checkboxes look better. Only one can be checked at a time and opens the related form.

Acknowledge - loginID / workstation / inputBy / DT / SOPID / SOPName / Version / Expires / NextDue / BiometricID / Notes?
*notify manager somehow if notes added



Form opens with the full customizable company text for confirmation. Once we receive the worker ack we need to keep that text from being edited.

Note: The SEND button is dimmed until the text field has data in it. We need a reason for non compliance.



Should be radio buttons by standards, but mutually exclusive checkboxes look better. Only one can be checked.

Should the user be able to set this period when the assigned BP is overdue when not acknowledged?

Status of the BPCI:

1. created (white)
2. assignment/notification to assigned persons - autonotify or manual (grey) if > 30 days without acknowlegement
3. acknowledgment or refusal - compliant or non-compliant
5. IF the BPCI has a practical test a full green box appears when complete, otherwise it shows compliant but incomplete in lists
4. non acknowledgment or refusal (pending. non-compliant)
5. acknowledged with notes (needs manager response and closure)
6. refusal (needs manager response and closure) (non compliant)
7. if the BPCI recycles, it goes yellow 60 days prior and shows up on due lists

Initial state

=========

Assigned
Notified
Notified > 30 days without ack.

Compliant

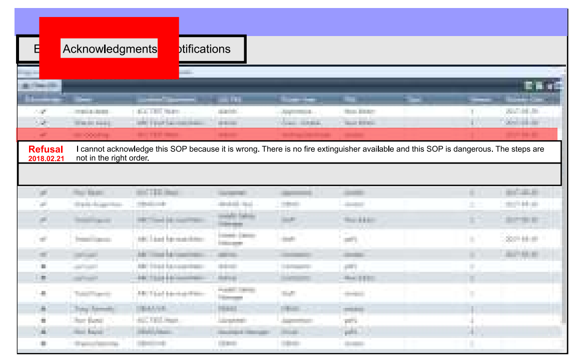
=========

Acknowledged
Acknowledged, waiting for practical test
Acknowledged with notes

Non compliant

=============

Created or Notified
Pending
Refusal with notes



Can we change the row background color if there are notes that have not been responded to?

We should review these color codings!

Acknowledgments page:

On entering the page I think it should be grouped on BPCI name. What would be very effective is a chart in each showing compliance level.

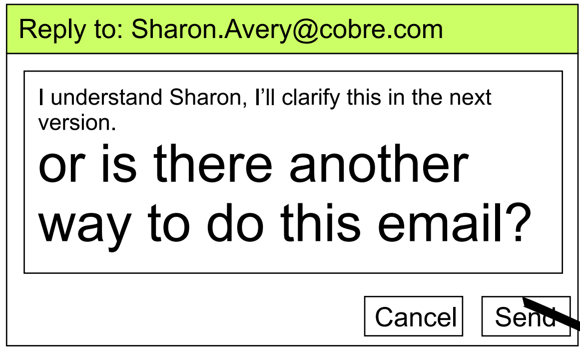
Acknowledge / Name / LoginID / Loc-Dept **OR** WorkTeam/ Title / BPCI# / Version / Ack Date/ **Last Practical Date** (if turned on)
Can we turn off some of these columns in telerik? They may want loc or work team, and may want Job Title or People Type as well.

We should use the standard color codings instead of checkmarks.

Acknowledge	Name	Location/Department	Job Title	People Type	Title	Type	Version	Acknow. Date
	charlie delta	KCC TEST/Main	Admin	Apprentice	New Editor		1	2017-05-29
	Sharon Avery	ABC Food Services/Main	Admin	Crew - mobile	New Editor		1	2017-05-29
	Ian Gooding	KCC TEST/Main	Admin	Visiting Electrician	simdut		1	2017-05-29
	Jav Mar	KCC TEST/Main	Carpenter	Apprentice	pdf1		1	2017-05-29
	Javier Martinez	KCC TEST/Main	Carpenter	Location Manager	New Editor		1	2017-05-29
	Joe Crumbaugh	ABC Food Services/Main	HR Manager	HR Manager	pdf1		1	2017-05-29
	Ron Eland	KCC TEST/Main	Carpenter	Apprentice	simdut		1	2017-05-29
	Sheila Angerman	DEMO/HR	WHMIS Test	DEMO	simdut		1	2017-05-29
	Peter Fenrich	ABC Food Services/Main	Admin	Apprentice	simdut		1	2017-05-29

Acknowledgment features

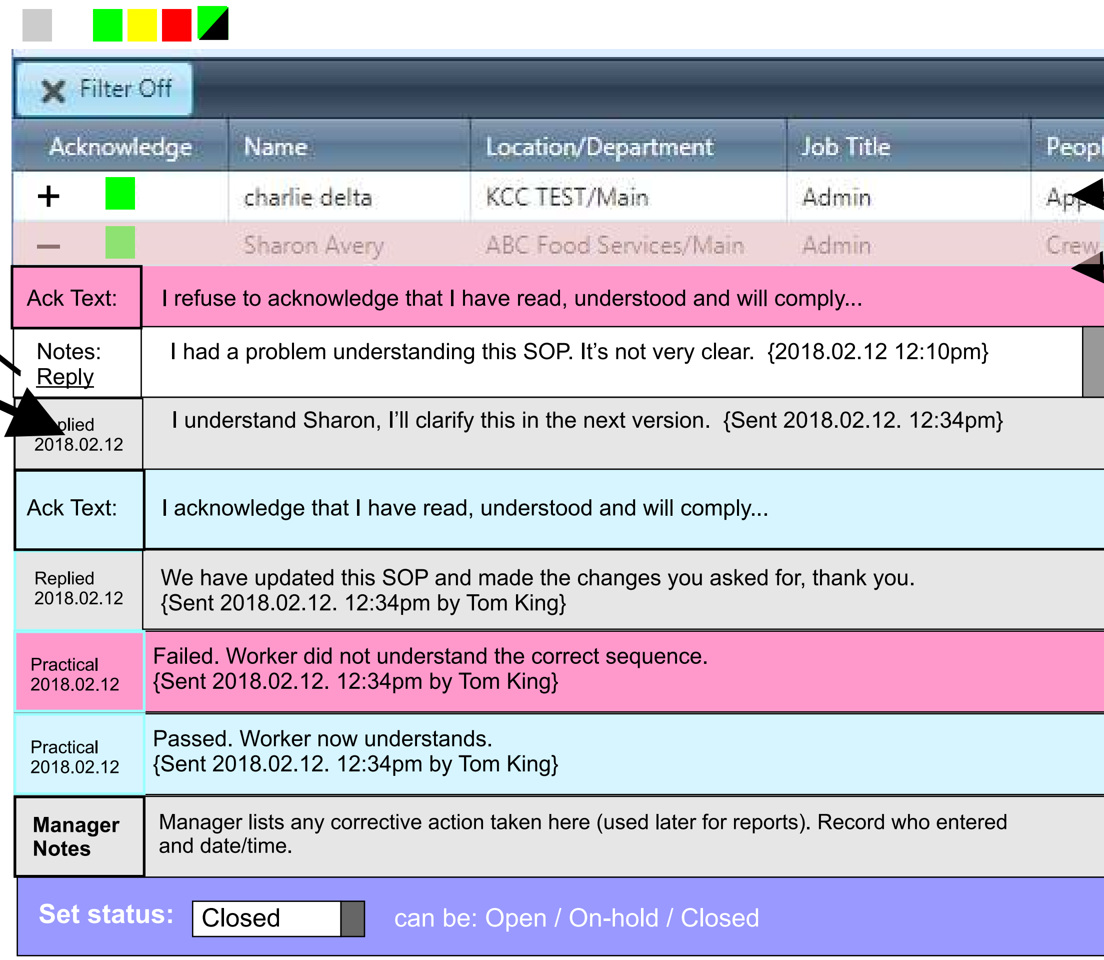
Here is what the received acknowledgment looks like to the manager:



Reply sends an email then pastes a notes trail in below.

Manager notes is a field for the manager to put comments.

Status is manually set.



Normal ack, no notes (green checkmark)

If the user refuses this is written here and status goes red. If they then acknowledge this is inserted to another row, and the status is green.

Practicals are inserted as they are done.

How do we alert on late ones?

When the record 'recycles' closed records are moved to history and a fresh empty one inserted. Records that are red however and not 'closed' do not recycle until manually closed. We need to alert on those.

- assigned
- assigned and notified
- notified > 30 days not acknowledged (overdue)
- acknowledged (no practical) = closed
- acknowledged with practical done= closed
- Ack with no practical or failed
- ack with comments = open (after reply the manager should set to closed)
- Ack is expired
- Ack is within 60 days of expiry (red overrides)

put delete function into 'edit' form

Manage SOP's page. What am I missing here?

color coded backgrounds for review and expiry dates

This page gives a quick readout of important information. We need to be able to sort by: newest / oldest / most compliant / least compliant / expiry date / responsible / category / scope / type / review date

Filters: expired / review date / type / responsible / ???

We should track the notifications in a list - date/time sent, to who, by SOP... where should this go? On the edit window in a tab?