

2021.07.05 review BPCI

Continuous Improvement form: Can we make title, date, type columns more narrow and the comments wider (that's all they want to see)

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KPIs	Quick View BPCI Stat	Continuous Improvement	Add/Edit BPCI	Assign BPCI E	Email History	BPCI to Courses	
BPCI Ma	anagers: Kayla McCall	um (A person can be set as B	PCI Manager in Peo	ple module->People	Profile->Edit P	Person)	
rag a colu	umn header and drop it he	re to group by that column					
Million and a loss							
		117			_		
Comments	Date	Title		Version	1 Туре		Comment
iomments	Date 2021-04-20 12:36 PM	Proper Lifting Technique		Version 1.00	1 Type		Comment I don't lift things.
			2		Hatsoul	ged with notes	
	2021-04-20 12:36 PM	Proper Lifting Technique		1.00	Hatsoul	ged with notes	I don't lift things.
*	2021-04-20 12:36 PM 2021-03-18 10:47 AM	Proper Lifting Technique Lab Safety and WHMIS		1.00 1.10	Acknowled	ged with notes	I don't lift things. I didn't like this SOP it's hard to understand
*	2021-04-20 12:36 PM 2021-03-18 10:47 AM 2021-03-17 02:21 PM	Proper Lifting Technique Lab Safety and WHMIS Substance Abuse for Sup		1.00 1.10 1.00	Acknowled	ged with notes	I don't lift things. I didn't like this SOP it's hard to understand testing refusal jm writing comment

Let's open the details form wider so, again, they can see the comments more easily

Comments to/from Katt, Tabitha (tabithakatt) on Proper Lifting Technique (v.1.00) Comment Sent By Comment's Date Comment Type Reply Replied By Man + 2021-05-14 11:30 AM Ramsey, Ron (ron) test comment McCallum, Kayla 2021-04-20 01:35 PM dfdsfsd Replied By Man. (kaylam) Katt, Tabitha I don't lift things. 2021-04-20 12:36 PM Refusal (tabithakatt)

What happens when we assign a BP manager? Do they get sent other emails? I need to list this for clients. When those people are removed as BP, inactivated, or deleted, let's make sure we stop showing/sending to them.

BPCI Managers: Kayla McCallum (A person can be set as BPCI Manager in People module->People Profile->Edit Person)





Add/edit form - let's use the new preview icon here instead of html5 logo?



on status tab - I think we should open the graph by default, as it looks good and is useful.

I think it would help to have a report on both 'quick view' and' 'bpci status' to show all persons assigned to a document and their status. Maybe it prints for all docs and persons, and they can select what to print, but this is what they really want to know.

or better if they can select for one document Document: Social Distancing Skills ver 5 2020.02.12

Compliant: Name / LoginID / Last Ack / Test Date/ Expires Ron / Ronm5 / 2021.04.15 / NA / 2022.04.15 BillKing / billy4 / 2021.03.12 / NA / 2022.03.12

Not compliant:

JavierM / jm5 / NA / NA / NA / NA Susyz / sz4 / 2021.03.12 / NA / 2022.03.12

Document: Welding safety ver 3.2 2013.04.22

BPCI's (Complianc	e Mana <u>c</u>	jement							
KPIs	Quick Vi	iew	BPCI Status	Continuous Impro-	vement	Add/Edit BPCI	Assign BPCI	Email History	BPCI to Courses	
Curre	nt BPCI	Histor	ical BPCI							
Graph	Click the	e graph	categories	to filter by status' —						
Drag a c	olumn hea	der and	drop it here	to group by that colum	n					
Status: A	Assigned	🛛 Notified	Viewed 1	Overdue 📕 Acknowledged	Acknowl	ledged - Practical test pe	nding 🔣 Refusal	Expiring Expired		
								_		

Bpci status - can we add text after 'Drag a column...' to say: 'Click the graph categories to filter by status'

ChangedDate	ModifiedBy	AckStartDate	Acknowledge	AckMessage	Ackiby	AckByMessage	AckStatusiD	AckVersion	AckDate	AckExpireDa
2021-04-20709:47:09:360	Ramsey, Ron (ron)	2021-04-20T09:47:09.360	1		ron1142	I, Ron Ramsey (ron), on 4/20/2021 verif				
2021-03-17713-26-18.530		2021-03-17713-26:18.397								
2021-03-05713-51:03.893		2021-03-05713 51:03 893								
2021-03-05712 45 44 867		2021-09-05712:45:44.867								

In BPCI status - under the log icon. I don't understand all the stuff in here. in the image above the bottom 3 rows, what are they? What is the ackstartdate? This could be very important in a legal event. How can we make sure this stuff never gets deleted? IE if the manager deletes the person, we should retain this data if we can for legal events.

100		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				N 22	17
ChangedDate	ModifiedBy	AckStartDate	Acknowledge	AckMessage	AckBy	AckByMessage	Ac
						I, Ron Ramsey (ron), on 4/20/2021	
						verify by clicking the 'Submit' button	
						below that the persons checked above	
						have been informed of and have	
						indicated to me their understanding of	
						Coronavirus COVID-19 Version 1.00 and	
						their intention to comply fully with the	
2021-04-20T09:47:09.387	Ramsey, Ron (ron)	2021-04-20T09:47:09.387	1		ron1142	information contained within.	
2021-03-31T14:21:22.370	Ramsey, Ron (ron)	2021-03-31T14:21:22.367					
2021-03-29T14:30:09.307	Ramsey, Ron (ron)	2021-03-29T14:30:09.307					

ServerA 1142 Covid19 document for Ron Ramsey - this exports to excel but the ack date and other info is missing, which is critical. This would be used legally.

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		Det number Oftegenn Type: *	HE Confident HE BPC-Beet P	Wersey Ud	•	andradije d some y <mark>same</mark>	Effective Cate Review Cate	1010-01-18 1010-05-34 1012-11-0s	(9)

This form still looks a bit too high or not wide enough. Can we offset where it opens a bit, move it down and to the right a bit so it looks more like a separate form.



Assign: if there are no workteams setup can we just not show the workteam tab?



How does this work?

Is it global - it does it for all courses, or by course? If by course we should change the wording a bit. If global... should we just show it on the screen somewhere?