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12.1 Sense and purpose of Process-Monitor

The Process Monitor helps the organization to control its processes. It provides insight into the work processes at any time and helps to ensure that the tasks important for risk and quality management are actually and correctly completed. **The "Risk Management" module is only intended for the organization's material risks.** Material means that events or developments of environmental factors can occur with a certain probability and can have a severe impact on the organization's strategic goals, operational activities or legal requirements. All other risks are captured by the process monitor.

The Process-Monitor is only visible to the power user and the management.

12.2 Step 1: Create task catalog in "Developer»

The basis of the Process Monitor is the task catalog. For this reason, the first step is to create a task catalog in the "Developer".

12.3 Step 2: Assigning the task catalog in the Process Monitor

in the sample organization, all task lists are stored under the topic "Topic 1". This can be freely defined when the form is created. It is important to make sure that this is done according to a specific system so that they can be found again later.

Assign Task

1 Task Configuration

Please select the organization

Organization *
Muster-Betrieb 1

Please select the category of the task

Category name *
002 Zimmer

Sub category name *
Spr Zi 1

Reviewing Group
Task will be accessible by all controlling group members. Or
SELECT GROUP MEMBER

Executing Group
Select responsible Person for this task
Executing Group

2 Task Selection

Members of the review-group are employees with the role «management»

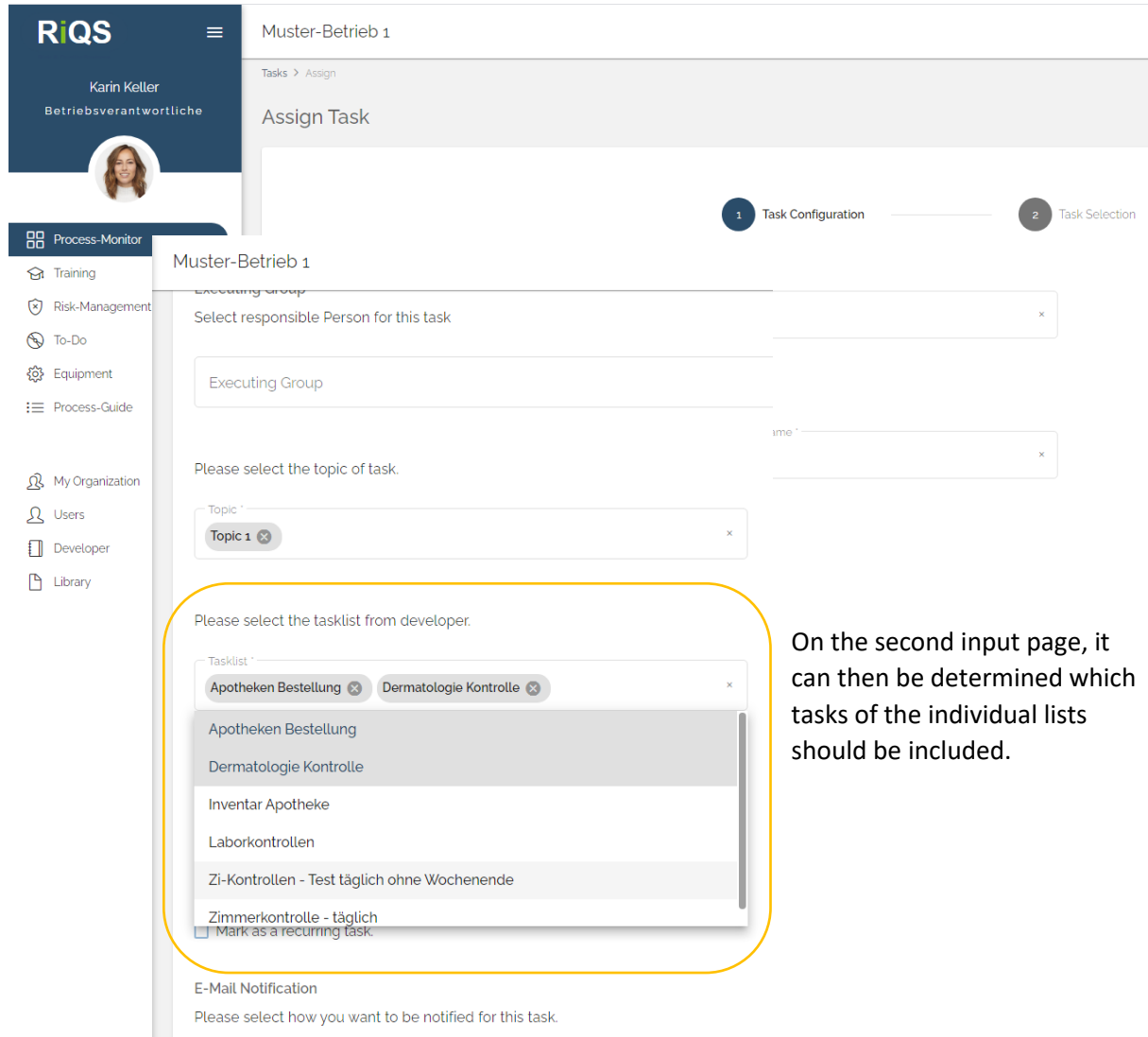
- ⇒ **Can be left empty**, as the line logs in with its personal login during the check and is thus recognized.
- ⇒ If there is no personal login, the responsible member of management can be entered here.

Members of the executing-group are employees with the role Employee Group A»

- ⇒ **Can be left empty**, as the management can select the person responsible for this task during the audit.
- ⇒ If only the same person is responsible for this task at any one time, he can be selected here.

12.4 Selecting task catalogs

Any number of lists can be selected from the list of task catalogues.



RiQS
Karin Keller
Betriebsverantwortliche

Muster-Betrieb 1

Tasks > Assign

Assign Task

1 Task Configuration 2 Task Selection

Muster-Betrieb 1

Select responsible Person for this task

Executing Group

Please select the topic of task.

Topic: Topic 1

Please select the tasklist from developer.

Tasklist: Apotheken Bestellung, Dermatologie Kontrolle

- Apotheken Bestellung
- Dermatologie Kontrolle
- Inventar Apotheke
- Laborkontrollen
- Zi-Kontrollen - Test täglich ohne Wochenende
- Zimmerkontrolle - täglich

☐ Mark as a recurring task

E-Mail Notification

Please select how you want to be notified for this task.

On the second input page, it can then be determined which tasks of the individual lists should be included.

12.5 Step 3: Scheduling the Process-Monitor Module

Muster-Betrieb 1

The screenshot shows the 'Executing Group' section of the Process-Monitor interface. It includes fields for 'Topic' (set to 'Topic 1'), 'Tasklist' (set to 'ZI-Kontrollen - Test täglich ohne Wochenende'), and 'Recurrence' (set to 'Daily'). A checkbox 'Mark as a recurring task.' is checked. The 'Interval' dropdown is open, showing options: Daily, Weekly, Monthly, and Annually. The 'Task end date' field is empty. Below the recurrence options, there are 'Saturday' and 'Sunday' checkboxes. At the bottom, there is an 'E-Mail Notification' section with a toggle 'Mail if task is not checked' and a 'Percentage' field.

An order can be one-time or recurring.
For "**one-time task**" the date can be specified.

Please select the topic of task.

Topic *

Topic 1

Please select the tasklist from developer.

Tasklist *

ZI-Kontrollen - Test täglich ohne Wochenende

☒ Mark as a recurring task.

Please select the recurrence of the task.

Interval *

Daily

Weekly

Monthly

Annually

Task end date *

Saturday

Sunday

E-Mail Notification

Please select how you want to be notified for this task.

☐ Mail if task is not checked

Percentage

Important: In case of any repetitions, an end date must be set. If there is none, we recommend 31 Dec in 2 years. The end dates of the tasks are visible in the task list as well as in the download report and can be managed there.

12.6 Consequences of non- or poor performance

You have the following options:

- **E-mail, if task was not checked**
as soon as this is set to active, a field appears with selection of the recipient(s)
 - **E-mail, a task has not reached a certain level of completion**
First enter the required degree of fulfillment. Then set to active and enter the person or persons who will be informed by e-mail if the degree of fulfillment is not reached.
 - **Tasks that are not checked will be postponed to the next day**
If this field is set to active, the corresponding task will always come back the next day, it is fulfilled. If desired, an e-mail will be sent to a specified person if the task is not checked.
- It is recommended to select this option - uncontrolled task is postponed to the next day - only in exceptional cases.** In the case of properly recurring tasks, the same task may appear several times for checking.

12.7 Selecting individual tasks from the task catalog

Now the desired tasks can be selected from the catalogue. It is possible to select all or only selected tasks. Furthermore, additional tasks from other catalogues can be added at this point.

Click on "ASSIGN" to complete the process.

12.8 Overview of "tasks to be checked today"

This view shows the tasks to be checked today. This view appears on the web, as well as on the tablet / smartphone automatically under the menu "Process Monitoring".

12.9 Task Review

The tasks can be edited or checked by the management on the web or on the tablet. Double-click on the desired task to open the review window:

The question and the location are marked yellow. The degree of fulfilment and the responsible or controlled employee must be filled in. The selection appears (blue marked) when the empty field is clicked. If employees of the management also take responsibility for individual tasks, they have to take the role of "management" as well as the role of "employee group A".

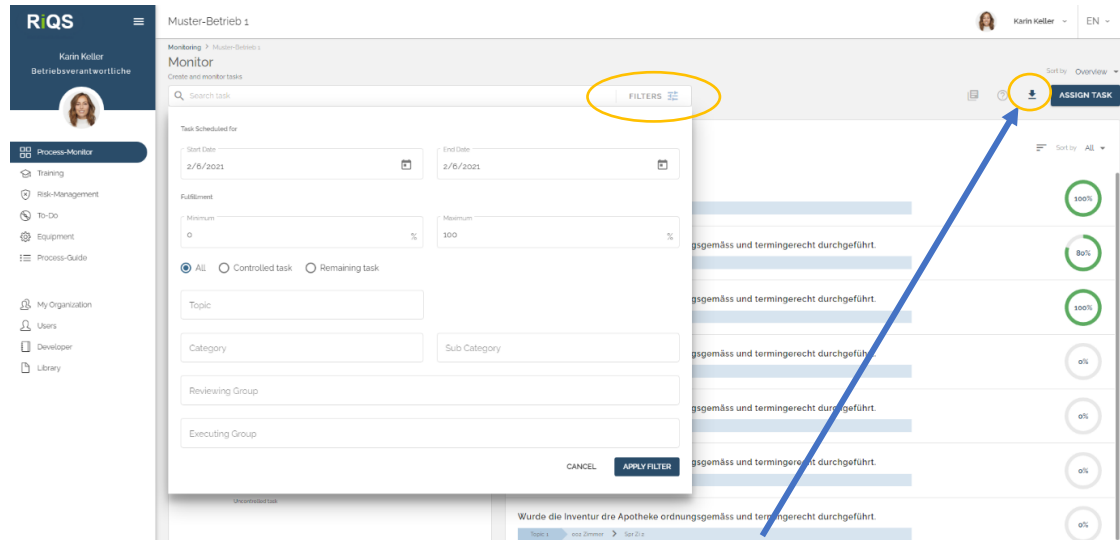
Remarks are optional. Finish with Save answer.

Overview shows how many tasks have been completed and which are still pending. With the selection only the controlled tasks or only the remaining tasks can be selected.

The image displays three screenshots of the RiQS Process-Monitor interface, illustrating how to filter tasks. The top screenshot shows the 'Overview' section with a progress indicator of 3/7 tasks completed. A yellow box highlights the filter dropdown menu, which includes options for 'All', 'Controlled task', and 'Remaining task'. Blue arrows point from this box to the middle and bottom screenshots. The middle screenshot shows the 'Overview' section with a progress indicator of 3/3 tasks completed, indicating that only controlled tasks are displayed. The bottom screenshot shows the 'Overview' section with a progress indicator of 0/4 tasks completed, indicating that only remaining tasks are displayed.

12.10 Evaluation - Using the filter

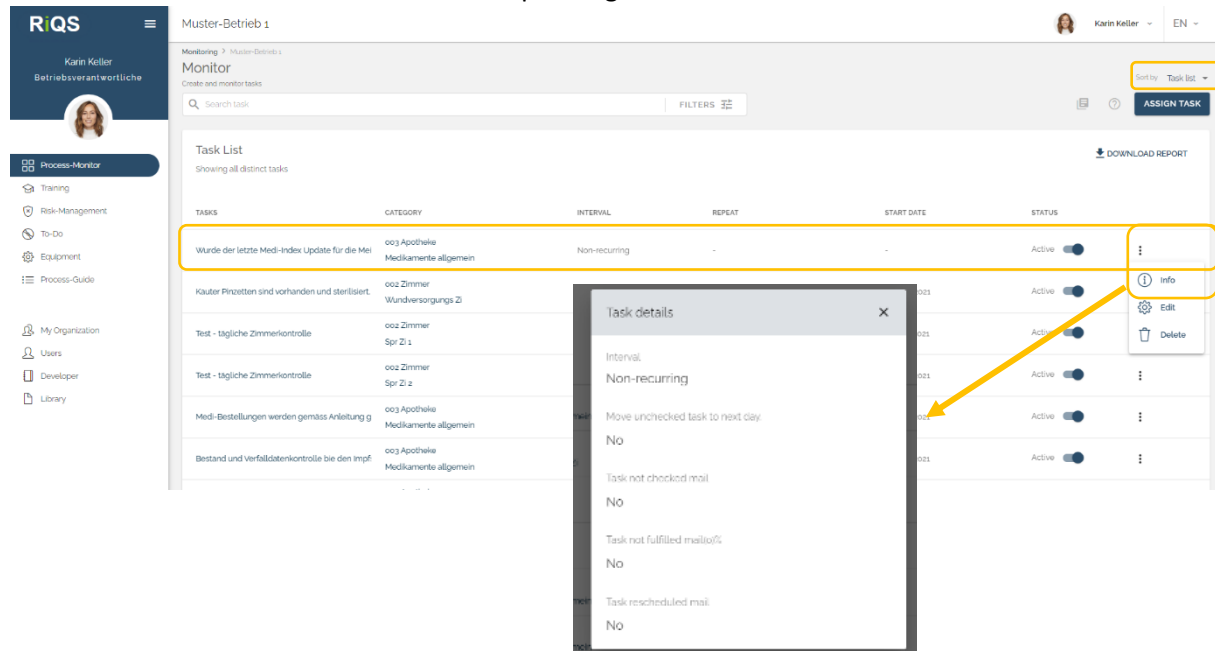
The filter can be used to evaluate the monitoring according to all possible criteria. On the one hand the evaluation of the selection is immediately displayed graphically. At the same time, the result can be exported to Excel where it can be edited as desired.



The result after the filter insert can be exported and edited further.

12.11 Task list

The task list shows all tasks with the corresponding information.



- active / inactive => if a task is set to inactive, it is no longer reviewed from this moment on. It can be set to active again at any time.

- i symbol => Information on the scheduling of the task

- gear icon => Processing of the task. Change only has an effect in the future, i.e. from the time of the change.

The task list can be exported to Excel. The list is generated in the background and provided in the "Reports" menu. The following information of a task is shown:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Report Name	Monitoring Task list										
2	Date	02.06.2021										
3	Organization	Muster-Betrieb 1										
	Category	Sub Category	Task	Avoid Weekends	Move uncheck task to next day	Task rescheduled mail	Mail Notification	Start Date	Interval	Repeat	Status	End Date
4	003 Apotheke	Medikamente allgemein	Wurde der letzte Medi-index Update für die Meidkamente durchgeführt?	No	No	No	--	-	None	-	Active	-
5	002 Zimmer	Wundversorgungs Zi	Kauter Pinzetten sind vorhanden und sterilisiert.	Yes	No	No	--	18.05.2021	Daily	1 Day	Active	31.05.2021
6	002 Zimmer	Spr Zi 1	Test - tägliche Zimmerkontrolle	No	No	No	Task not fulfilled (100%) - Assigned members: Karin Keller	17.05.2021	Daily	1 Day	Active	19.05.2021
7	003 Apotheke	Medikamente allgemein	Wurde der letzte Medi-index Update für die Meidkamente durchgeführt?	No	No	No	--	21.05.2021	Weekly	friday	Active	31.12.2022
8	003 Apotheke	Regale A-D	Wurde der letzte Medi-index Update für die Meidkamente durchgeführt?	No	No	No	--	-	None	-	Active	-
9	003 Apotheke	Medikamente allgemein	Null- und Minusbestände werden im System kontrolliert. Kontrollblatt ist nachgeführt.	No	No	No	--	21.05.2021	Weekly	friday	Active	31.12.2022
10	002 Zimmer	Spr Zi Derma	Sämtliche Geräte funktionieren und wurden entsprechend den Vorgaben gewartet/aufgeladen.	No	No	No	--	20.05.2021	Weekly	thursday	Active	31.12.2022
11	002 Zimmer	Spr Zi Derma	Material und Medikamente sind entsprecend dem Zimmer-Inventar vorhanden und aufgefüllt.	No	No	No	--	20.05.2021	Weekly	thursday	Active	31.12.2022
12	002 Zimmer	Spr Zi 1	Test - allgem. Zimmer-Kontrolle	Yes	No	No	--	16.05.2021	Daily	2 Days	Active	31.12.2022
13	002 Zimmer	Spr Zi Derma	Kauter Pinzetten sind vorhanden und sterilisiert.	No	No	No	--	20.05.2021	Weekly	thursday	Active	31.12.2022
14	002 Zimmer	Spr Zi 2	Wurde die Inventur dre Apotheke ordnungsgemäss und termingerecht durchgeführt.	Yes	Yes	Yes	Task rescheduled- Assigned members: Karin Keller	24.05.2021	Daily	1 Day	Active	31.05.2021
15	003 Apotheke	Medikamente allgemein	Werden de Medikamente täglich innert zwei Stunden nach Ankunft ausgeräumt?	No	No	No	--	21.05.2021	Weekly	friday	Active	31.12.2022
16	003 Apotheke	Medikamente allgemein	Nicht lieferbare Medikamente auf Liste Mangnetwand nachgefragt. MPA u Az sind informiert.	No	No	No	--	21.05.2021	Weekly	friday	Active	31.12.2022
17	003 Apotheke	Medikamente allgemein	Bestand und Verfalldatenkontrolle bie den Impfstoffen sind aktuell.	No	No	No	--	21.05.2021	Weekly	friday	Active	31.12.2022
18	003 Apotheke	Medikamente allgemein	Medi-Bestellungen werden gemäss Anleitung gemacht. Vorbereitungsform mit Bestand visiert im Ordner.	No	No	No	--	21.05.2021	Weekly	friday	Active	31.12.2022
19	002 Zimmer	Spr Zi 2	Test - tägliche Zimmerkontrolle	No	No	No	--	15.05.2021	Daily	3 Days	Active	31.12.2022
20	002 Zimmer	Spr Zi 2	Test - tägliche Zimmerkontrolle	No	No	No	--	15.05.2021	Daily	3 Days	Active	31.12.2022

12.12 To-Do to a concrete task

The management has the possibility to assign a To-Do related to a concrete checkpoint to any user.

Organisation 1

Karin Keller

EN

RiQS Organisation 1

Tasks > Tägliche Bowie-Dick Test wurde immer durchgeführt > Answer

Task list

Information

Tägliche Kontrolle

Tägliche Bowie-Dick Test wurde immer durchgeführt

controlled User

Cathrine Widler

cathrine.widler@alicam.ch

Organisation 1

Karin Keller

EN

RiQS Organisation 1

assign

Assign To-Do

1 To-do Configuration

2 To-do Selection

Please select the organization

Organization *

Organisation 1

Assign To-Do for

☐ Risk-Management ☐ Training ☒ General

Reference

Reference *

Tägliche Bowie-Dick Test wurde immer durchgeführt

Creation of a To-Do in connection with this task.

- The first part of the form is already filled in.
- Only the recipient and, in a second step, the To-Do must be formulated.