


Best Practices				
General Engineering Instructions	Title: <b>BEST PRACTICES SEARCH SYSTEM DOCUMENTATION</b>			
	ID: <b>BPI-BP-GEI-0001</b>			
	Last Changed by:	Initials: QMC	Date: 07/17/2025	Page <b>1</b> of <b>14</b>
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**Purpose:** Train BPI employees how to create, update, and maintain the Best Practices Search System. Provide proper ways to make small changes to the system.


**Materials Needed:** N/A

**References:**

[BPI-BP-XXXX-####.dotx \(BEST PRACTICES TEMPLATE\)](#)


[BPI-BP-GEI-0003 \(BEST PRACTICE INDEX SYSTEM\)](#)

[BEST PRACTICE INDEX.xlsx \(BEST PRACTICE INDEX EXCEL\)](#)


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# 1. CREATING A BEST PRACTICE

## 1.1. CREATING A BEST PRACTICE CHECKLIST

1. ☐ CREATE BEST PRACTICE WORD DOCUMENT
2. ☐ CREATE BEST PRACTICE PDF
3. ☐ UPDATE BEST PRACTICE INDEX
4. ☐ RUN POWERSHELL COMMAND

### 1.1.1. CONCLUSION

When everything is checked off, a new Best Practice was created and BPsearch.html was updated to make the document searchable.

## 1.2. CREATE BEST PRACTICE WORD DOCUMENT

### 1.2.1. OPEN TEMPLATE

Open the Best Practices Template titled BPI-BP-XXXX-####, located at <H:\Master Documents\!TEMPLATE\BPI-BP-XXXX-####.docx>.

### 1.2.2. FILL OUT HEADER FIELDS

Title – The title of the Best Practice.

ID – The unique Best Practice ID given to the document, new IDs are created using the BPI-BP-XXXX-#### format, where XXXX is the Document Subtype abbreviation and #### is the next available number of that Subtype. More information regarding Best Practice IDs can be found at BPI-BP-GEI-0003, located at <H:\PDFs\BPI-BP-GEI-0003.pdf>.


Document Subtype – The non-abbreviated Document Subtype, should match the Document Subtype in the ID.

Last changed by – The Initials of who made the most recent change, in this case whoever is creating the Best Practice, and the Date the last change was made, in the mm/dd/yyyy format, include leading zeros.

Last Approved by – The Initials and Date field will be filled in by whoever Approves the information of the Best Practice is accurate.

### 1.2.3. FILL OUT FIRST PAGE

Purpose – The purpose or description of the Best Practice, attempt to be specific but also concise. This paragraph becomes the description of the Best Practice in its search result.

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Materials – Any physical materials or tools needed for the practice, can be N/A.

References – Any references to other Best Practices within the document, can be N/A.

#### 1.2.4. TABLE OF CONTENTS

Reflects and links to headings used within the document. When adding more headings, left-click the Table, select Update Table, select Update entire table, then select OK to update the Table to reflect any heading changes whether name or page number.

#### 1.2.5. CONTENT

Starting on the page after the Table of Contents, write the procedures, information, and images the Best Practice covers, using Headings, Heading 2s, and Heading 3s to subdivide the content and make it easier to access from the Table of Contents.

#### 1.2.6. SAVE THE WORD DOCUMENT

Save, *Ctrl + S*, the Best Practice as a .docx in the Master Documents folder, H:\Master Documents, with the document's name being its ID.

### 1.3. CREATE BEST PRACTICE PDF

#### 1.3.1. SAVE AS PDF

In the Best Practices Word Document, in Save As, save the document as a .pdf in the PDFs folder, H:\PDFs, with the pdf's name being the document's ID.

### 1.4. UPDATE BEST PRACTICE INDEX

#### 1.4.1. OPEN THE BEST PRACTICE INDEX


Open the Best Practice Index Excel titled BEST PRACTICE INDEX.xlsx, located at <H:\Search System\BEST PRACTICE INDEX.xlsx>.

#### 1.4.2. ADD TABLE ROW

Add a new row to the table and populate each column with the information specific to the Best Practice. These columns are covered in more detail in section 5. BEST PRACTICE INDEX of this document.

#### 1.4.3. SORT ID COLUMN

Left-click the drop down in the ID column header, then select Sort A to Z.

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#### 1.4.4. SAVE THE BEST PRACTICE INDEX

Save the Best Practice Index, *Ctrl + S*.

### 1.5. RUN POWERSHELL COMMAND

#### 1.5.1. OPEN TERMINAL

In File Explorer, navigate to the Search System folder, [H:\Search System\](#), right-click -> Open in Terminal to open PowerShell in the correct directory.

#### 1.5.2. RUN THE COMMAND

On the Terminal Command Line, type the following command:

```
./updateBP BPI-BP-XXXX-####
```

Replacing the BPI-BP-XXXX-#### with the document's ID. Then run the command, *Enter*.

#### 1.5.3. CONFIRM RESULT

While the command is running it should print updates upon completing certain steps, like accessing files. The command would print, Successfully updated BPsearch.html, if the script encountered no issues and finished updating the BPsearch.html. Meaning users can search for the document after reloading their page.


If the script returned a warning, it could have still updated BPsearch.html, it encountered some behavior that was likely unintentional and is informing the user.

If the script returned an error, it failed to update BPsearch.html and is providing the user with some idea of what the issue is.

## 2. EDITING A BEST PRACTICE

### 2.1. EDITING A BEST PRACTICE CHECKLIST

- ☐ EDIT BEST PRACTICE WORD DOCUMENT
- ☐ OVERWRITE BEST PRACTICE PDF
- ☐ UPDATE BEST PRACTICE INDEX
- ☐ RUN POWERSHELL COMMAND

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### 2.1.1. CONCLUSION

When everything is checked off, a Best Practice was edited and BPsearch.html was updated to reflect the changes made to the document.

## 2.2. EDIT BEST PRACTICE WORD DOCUMENT

### 2.2.1. OPEN WORD DOCUMENT

Open the Best Practices Word Document in the Master Documents folder, located at <H:\Master Documents>.

### 2.2.2. EDIT WORD DOCUMENT

Make any desired changes to the Word Document, then remember to update the Table of Contents, left-click the Table, select Update Table, select Update entire table, then select OK. In the header, correct the Last Changed by initials and date.

### 2.2.3. APPROVE CHANGES

Get the changes made to the Document approved and then correct the Last Approved by initials and date.

### 2.2.4. SAVE THE WORD DOCUMENT

Save the word Document, *Ctrl + S*.

## 2.3. OVERWRITE BEST PRACTICE PDF

### 2.3.1. SAVE AS PDF


In the Best Practices Word Document, in Save As, save the document as a .pdf in the PDFs folder, H:\PDFs, with the pdf's name being the document's ID. Select OK when prompted to replace the old pdf.

## 2.4. UPDATE BEST PRACTICE INDEX

### 2.4.1. OPEN THE BEST PRACTICE INDEX

Open the Best Practice Index Excel titled BEST PRACTICE INDEX.xlsx, located at <H:\Search System\BEST PRACTICE INDEX.xlsx>.



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### 2.4.2. EDIT THE TABLE ROW

Locate the row for the Best Practice, use the ID column, and edit any column whose information specific to the Best Practice was changed. These columns are covered in more detail in section 5. BEST PRACTICE INDEX of this document.

### 2.4.3. SAVE THE BEST PRACTICE INDEX

Save the Best Practice Index, *Ctrl + S*.

## 2.5. RUN POWERSHELL COMMAND

### 2.5.1. OPEN TERMINAL

In File Explorer, navigate to the Search System folder, [H:\Search System\](#), right-click -> Open in Terminal to open PowerShell in the correct directory.

### 2.5.2. RUN THE COMMAND

On the Terminal Command Line, type the following command:

```
./updateBP BPI-BP-XXXX-####
```

Replacing the BPI-BP-XXXX-#### with the document's ID. Then run the command, *Enter*.

### 2.5.3. CONFIRM RESULT

While the command is running it should print updates upon completing certain steps, like accessing files. The command would print, Successfully updated BPsearch.html, if the script encountered no issues and finished updating the BPsearch.html. Meaning users can search for the document after reloading their page.


If the script returned a warning, it could have still updated BPsearch.html, it encountered some behavior that was likely unintentional and is informing the user.

If the script returned an error, it failed to update BPsearch.html and is providing the user with some idea of what the issue is.

## 3. RETIRING A BEST PRACTICE

### 3.1. EDITING A BEST PRACTICE CHECKLIST

1. ☐ EDIT BEST PRACTICE INDEX

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## 2. ☐ RUN POWERSHELL COMMAND

### 3.1.1. CONCLUSION

When everything is checked off, a Best Practice was retired and will not appear in BPsearch.html search results.

## 3.2. EDIT BEST PRACTICE INDEX

### 3.2.1. OPEN THE BEST PRACTICE INDEX

Open the Best Practice Index Excel titled BEST PRACTICE INDEX.xlsx, located at <H:\Search System\BEST PRACTICE INDEX.xlsx>.

### 3.2.2. EDIT THE TABLE ROW

Locate the row for the Best Practice, use the ID column, and in the HIDDEN column write RETIRED. These columns are covered in more detail in section 5. BEST PRACTICE INDEX of this document.

Anything written in this column will cause the document to not appear in search results, so it can be used to write a reason why the document should not appear in search.

### 3.2.3. SAVE THE BEST PRACTICE INDEX

Save the Best Practice Index, *Ctrl + S*.

## 3.3. RUN POWERSHELL COMMAND

### 3.3.1. OPEN TERMINAL


In File Explorer, navigate to the Search System folder, <H:\Search System>, right-click -> Open in Terminal to open PowerShell in the correct directory.

### 3.3.2. RUN THE COMMAND

On the Terminal Command Line, type the following command:

```
./updateBP BPI-BP-XXXX-####
```

Replacing the BPI-BP-XXXX-#### with the document's ID. Then run the command, *Enter*.

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### 3.3.3. CONFIRM RESULT

While the command is running it should print updates upon completing certain steps, like accessing files. The command would print, Successfully updated BPsearch.html, if the script encountered no issues and finished updating the BPsearch.html. Meaning users can search for the document after reloading their page.

If the script returned a warning, it could have still updated BPsearch.html, it encountered some behavior that was likely unintentional and is informing the user.

If the script returned an error, it failed to update BPsearch.html and is providing the user with some idea of what the issue is.

## 4. MASS UPDATING KEYWORDS

### 4.1. EDITING A BEST PRACTICE CHECKLIST

1. ☐ EDIT BEST PRACTICE INDEX
2. ☐ RUN POWERSHELL COMMAND

#### 4.1.1. CONCLUSION

When everything is checked off, a Best *Practice was retired and will not appear in* BPsearch.html search results.

### 4.2. EDIT BEST PRACTICE INDEX


#### 4.2.1. OPEN THE BEST PRACTICE INDEX

Open the Best Practice Index Excel titled BEST PRACTICE INDEX.xlsx, located at <H:\Search System\BEST PRACTICE INDEX.xlsx>.

#### 4.2.2. EDIT THE TABLE ROWS

Locate the rows for the Best Practices, use the ID column, and in the KEYWORDS column add the desired keywords. These columns are covered in more detail in section 5. BEST PRACTICE INDEX of this document.

Keywords are words and phrases that help search find the Best Practice. Separate keywords using newlines, *Alt + Enter*.

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### 4.2.3. SAVE THE BEST PRACTICE INDEX

Save the Best Practice Index, *Ctrl + S*.

## 4.3. RUN POWERSHELL COMMAND

### 4.3.1. OPEN TERMINAL

In File Explorer, navigate to the Search System folder, [H:\Search System\](#), right-click -> Open in Terminal to open PowerShell in the correct directory.

### 4.3.2. RUN THE COMMAND

On the Terminal Command Line, type the following command:

```
./updateBPKW
```

Then run the command, *Enter*.

### 4.3.3. CONFIRM RESULT

While the command is running it should print updates upon completing certain steps, like accessing files. The command would print, Successfully updated BPsearch.html, if the script encountered no issues and finished updating the BPsearch.html. Meaning users can search for the document after reloading their page.

If the script returned a warning, it could have still updated BPsearch.html, it encountered some behavior that was likely unintentional and is informing the user.

If the script returned an error, it failed to update BPsearch.html and is providing the user with some idea of what the issue is.


## 5. BEST PRACTICE INDEX

### 5.1. COLUMNS

#### 5.1.1. ID

The Best Practice's ID, used by the PowerShell script to match a row's contents with its Best Practice. It is important for the ID to be in a format the script can read, meaning no spaces in the cell even after the ID.

Used by search.

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### 5.1.2. TITLE

The Best Practice's Title, this text is what becomes the title displayed as the Best Practice's search result.

Used by search.

### 5.1.3. KEYWORDS

Words and phrases that help search find the Best Practice. Separate keywords using newlines, *Alt + Enter*.

Keywords can be used to attach words to a Best Practice for searching, even if it is not present in the ID, Title, or Content of the document, such as a department. Additionally, Keywords have a higher priority than Content, so they can be used to make type of document, like a set-up manual, to appear higher in the search results than a document that has set-up manual in its Contents more times.

Used by search.

### 5.1.4. WORD DOCUMENT PATH

The file path to the document's .docx file. Obtain in File Explorer, with the document's .docx file selected, right-click -> Copy as path or *Ctrl + Shift + C*. In Excel make a hyperlink, with the cell selected *Ctrl + K* (Note: the cell must be selected not accessing its text). Paste, *Ctrl + V*, the copied file path into the Address textbox and in the Text to display textbox remove any quotation marks from the edges of the path, then select OK.

The visible text of the hyperlink is used by the PowerShell script to find the Word Document to read the Content. It is important for the Path to be in a format the script can read, meaning just the path and no quotation marks.

Not used by search.


### 5.1.5. CHANGED BY

The initials of who the document was last changed by.

Not used by search.

### 5.1.6. CHANGE DATE

The date the document was last changed.

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Not used by search.

#### 5.1.7. APPROVED BY

The initials of who the document was last approved by.

Not used by search.

#### 5.1.8. APPROVAL DATE

The date the document was last approved.

Not used by search.

#### 5.1.9. HIDDEN

The reason why the document should not appear in search results. If any text is present in this column, the Best Practice of that row will not be included in BPsearch.html's dataset, meaning the document will not appear in any search results. Used to retire documents or have active documents that are not visible via search.

Not used by search.

### 5.2. CHANGING COLUMNS

#### 5.2.1. COLUMN ORDER

The order and position of the columns can be changed at any time.

#### 5.2.2. COLUMN NAMES

The names of a column can be changed, but the PowerShell scripts access their contents based on the columns' names. So whenever a name change is made to a column, open both scripts, updateBP.ps1 and updateBPKW.ps1 in a text editor, and correct any of the EDITABLE variables, near the start of the file, that are for the headers that were changed.