TRN-SOP-0008 R- 00

reason33

Periodic Review Current:
This is a brainstorming session to address insights periodic review data/dashboard....

Scenario #1: (most common)

Infocard Type: SOP (1 Year Review Policy)
Doc: SOP0055
Revision: 1
Approved/Effective: 4/5/21
================================
Next Review Date: 4/5/22

Revised 3/15/22 & CANCELS Review Date: 4/5/22
Doc: SOP0055
Revision: 2
Approved/Effective: 3/15/22 --- Sets Next Review Date: 3/15/23

so on and so on and so on

Scenario #2: (one of the reasons we're doing E-06876 - Document Review to
Packet/Workflow)

Infocard Type: SOP (1 Year Review Policy)
Doc: SOP0055
Revision: 1
Approved/Effective: 3/15/21

Next Review Date: 3/15/22....TODAY!

Document Flagged As "Reviewed" or "Needs Update" --- Either Way It Doesn't Matter
If "Reviewed" - Client launches it on a specifically configured workflow to revise.
If "Needs Update" - Client aborts one step collaboration then launches it on a
specifically configured workflow to revise.

This is the INSIGHTS Challenge

"Needs Update" > "One Step" > NEW Revision...if criteria is met then insights - yes
"Needs Update" > "pre-configed route" > New Revision...

E-06876 - Document Review to Packet/Workflow....This will enable clients to
config/associate a specific workflow to periodic review - instead of default system
one-step route but the two above situations will still apply (especially #1)

reviewed (revised of review), revision, revision, reviewed (revised of review)...a report
similar to the individual infocard but on a larger scale

really need - if review (packet_id = 1) process commences (needs Update) --> ***1 step
collab (packet_id = 2)*** --> if aborted (packet_id = 3)

tdc_reject_abort -- track chains of reject

on review, on collab,

(REVIEW) packet_id = 1 (parent)...needs upgrade....(Whatever route they choose) packet_id
= 2 (child)

tdc_reject_abort - repurpose

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TRN-SOP-0008 R- 00

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Meeting with Chad 3/23/22....Lars wants to track the disconnect (abort to new packet) ---
this is not possible because they are two independant actions

https://miro.com/app/board/uXjVOD_WSXA=/

Jason to setup meeting with Dawn, Lars, Steph, Chad....Jason to explain the bad news
HOWEVER with the new E-06728...if clients use properly then data will be there to pull as
long as they don't abort (commit the disconnect - the 3rd transaction).

change name to stale document report

reason33

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Signature Manifest

Document Number: TRN-SOP-0008   **Revision:** 00

Title: jason test 4

Effective Date: 05 Apr 2022

All dates and times are in Mountain Time Zone.

Quick Approval

Approve Now

Name/Signature	Title	Date	Meaning/Reason
Jason Sant (JSANT)		05 Apr 2022, 05:05:47 PM	Approved

Quick Approval

Approve Now

Name/Signature	Title	Date	Meaning/Reason
Nupura Deshmukh (NDESHMUKH)		29 Aug 2022, 07:28:58 AM	Approved

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