Check the package before delivery

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Context

At step 5, the preview shows the final plan layout and gives access to delivery commands. Use this list after each creation or revision.

Starting point

Step 5 — preview

Prerequisites

- Have prepared information, procedures, attachments and theme.

Steps

1. Review all pages

Check the customer, zones and surfaces, products, parameters and task order. Also check text, illustrations and page breaks.

2. Check generated attachments

Review the introduction and conclusion. For dynamic documents, check surfaces to monitor, procedures and the list of products actually present in the plan.

3. Choose the next action

If a correction is needed, return to the relevant step. Otherwise use the commands detailed on page 25 to send a draft for feedback or deliver the final package after closing.

4. The right customer

Plan name, customer, establishment, address, language and validity period are correct.

5. The right scope

Zones and surfaces match the site. Duplicates and unnecessary elements have been removed.

6. The right procedures

Products, dosages, temperatures, frequencies, checks, tasks and PPE are consistent.

7. The right documents

Attachments are useful and in the right order. Required technical and safety data sheets are present and current.

8. A readable layout

All pages have been reviewed: text, images, colours, page breaks and dynamic documents.

9. The right version

The approval workflow has been followed. The final version is closed and the correct package delivered to the correct recipient.

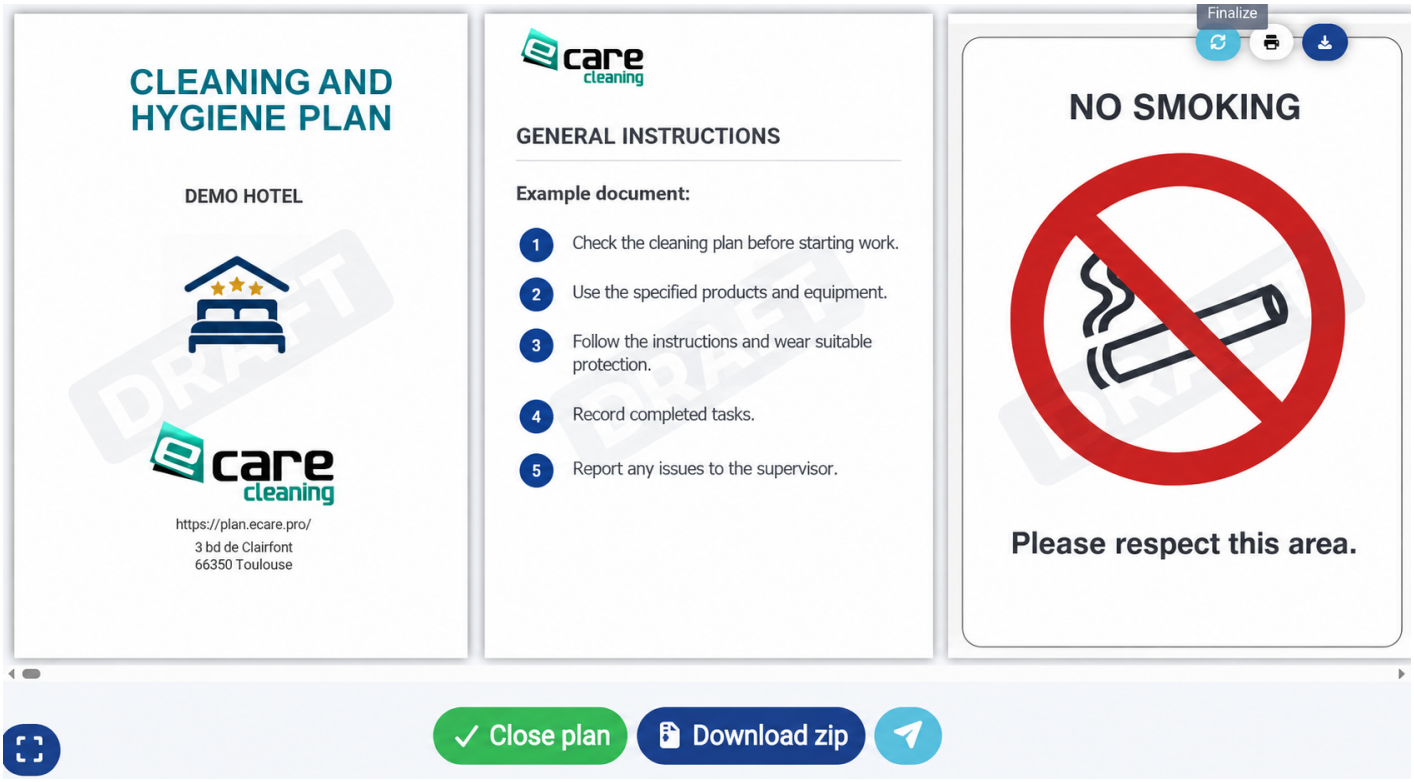
Expected result

The customer, scope, procedures, documents, layout and version are checked.

Remember

- Until the plan is closed, the Draft watermark appears on its pages. Saving the work does not make the plan final.

Illustrations



See also

- Print, download and send the package
- Approve and close the plan

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