Create and prepare a library procedure

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Context

A library procedure brings together reusable parameters and tasks for treating a surface.

Starting point

Library → Procedures → New procedure

Prerequisites

- Know the usual products and operating instructions to prepare.

Steps

1. Open a new procedure

From the menu, choose Library > Procedures, then click New procedure. Enter its name, reference and, if necessary, group reference. Check the record language and use products matching the procedure or plan language. The interface language and the data language are separate choices.

2. Assign product and parameters

Select the product normally used for the surface. Complete dosage, temperature and frequency, then visual, smell and/or bacterial checks. Entry steps are detailed on page 13.

3. Build the tasks

Add tasks in execution order. For each, choose the type, image and free text. Check the operating instructions, then save the procedure. See details on page 14.

4. Prepare the base procedures

Base procedures are supplied without an associated product. During initial preparation, check each one and assign the appropriate product. Adapt, delete or add procedures as needed for your range.

Expected result

The procedure is saved with its product, parameters and tasks.

Remember

- Consistent default products make bulk replacements easier in customer plans. A standard procedure must then be adapted to the site’s actual use.

See also

- Import a procedure from a plan
- Enter procedure parameters
- Create the operating procedure's tasks

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