STANDARD OPERATING PROCEDURE INSTRUCTIONS

GENERAL INSTRUCTIONS

The CQM system has recently been enhanced with new and improved Standard Operating Procedure (SOP) functionality. These instructions will help Producers use the new functionality.

Previously, the system allowed each Producer to have only one SOP for their farm. Consequently for farms that utilized more than one Milking Type (e.g. Tie Stall, Free Stall, Automatic Milking System – DeLaval, etc.), the SOPs for each of these were contained in the one single SOP. Since Producers are required to have SOPs for each Milking Type utilized on their farm, the system has been enhanced to allow multiple SOPs for each farm.

The first time a Producer logs in to the enhanced system, they will be required to convert their current SOP to the new format by selecting the appropriate Milking Type from a list. If the farm utilizes only one Milking Type (e.g. Tie Stall) then this selection is easy. However, if the farm utilizes more than one Milking Type then the Producer will have to convert their current SOP to one of the Milking Types that they utilize and then create additional SOPs for any other Milking Types they require. Each SOP should be edited to cover only the Milking Type it represents.

The remainder of this document provides detailed instructions for the initial conversion plus instructions for editing an existing SOP, creating a new SOP and deleting an SOP.

CONVERT YOUR SOP TO THE NEW FORMAT

1. Producers will be required to do a one-time conversion of their existing SOP into the new format (see the General Instructions section of this document for further explanation).   This will be high-lighted in yellow on the Producers home page as per the example below:

    Note: If you have both an in-progress SOP and official SOP the in-progress SOP will be converted.

    SOP TEST

    Producer ID: ███008675309
    Registration Status: Registered
    CQM Number: QC20150002R

    My CQM Program

Last Validation Activity	Next Validation Activity
Your last validation milestone was a full validation completed on 2016/04/04 with a status of Approved.	Your next validation milestone is a self-declaration due 2017/04/04.

    General Information

Assigned Validator:	Assigned Trainer:
Francine Girard (450) 987-5432 nsillett@ruminator.org	Not Assigned
Application Date: 2015/10/14	
Registration Date: 2016/04/04	**Training Date:** -

    CQM Contacts
    CQM Forms and Documents

    Standard Operating Procedures

    You need to convert your SOP to the new SOP format.
    Please select Milking Type that your SOP was created for and click Convert. (Help)
    Milking Type [Select Milking Type ▾]   [Convert]

    Validations(1)
    Full(1)

2. Select the appropriate Milking Type then click Convert button. This will tie the existing SOP to selected template.

    Standard Operating Procedures

    You need to convert your SOP to the new SOP format.
    Please select Milking Type that your SOP was created for and click Convert. (Help)
    Milking Type [Freestall ▾]   [Convert]

3. Once the SOP is converted, it will be displayed on the Producer Home Page as per the example below:

Your "Official SOP" has been successfully converted.

SOP TEST

Producer ID: ██008675309

Registration Status: Registered

CQM Number: QC20150002R

My CQM Program

Last Validation Activity	Next Validation Activity
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Registration Date: 2016/04/04	

CQM Contacts

CQM Forms and Documents

Standard Operating Procedures (Help)

Milking Type	Last Modify Date	Actions		
Freestall	2016/12/13	View And Print	Edit	Delete

Language	Select Language ▾	**Milking Type**	Select Milking Type ▾

Add New Milking Type

4. When the SOP is converted to the new format, the steps for each Procedure are placed in the "Historical Details" field **as circled in red below**. It is suggested that producers choose and/or edit any elements from the "Details" section. Those selected will be added to your SOP. Producers can also copy and paste from the "Historical Details" section into the appropriate "Details" or "Other Details" sections.

If you need assistance, please contact your provincial office.

CREATE OR EDIT A NEW SOP

1. <mark>To create a new SOP</mark>, select the <u>Language</u> and <u>Milking Type</u> then click the "Add New Milking Type" button as shown below (**circled in red**). Please note that the Milking type dropdown list will only show templates which have not been setup yet. <mark>To edit an existing SOP</mark>, select "Edit" (**circled in green**).

2. The following screen will be displayed. The next steps indicate how to create or edit the SOP.

3. Use the "Review/Add SOP" dropdown list (**circled in green above**) to add a new procedure to the SOP or to jump to a different procedure. Note that the system will automatically move to the next sequenced procedure when the "Save and Next" button is pressed at the bottom of the screen (**circled in red above**).

4. For each Procedure "Detail" you want to add to the SOP, click on the boxes on the left side of the screen (**circled in blue above**). Note that you can click on the "Select All" box to select all the boxes at once. You can change the text for any Detail to reflect what is done on your farm. Note that the ones marked with a red asterisk are mandatory.

5. The "Other Details" text box is reserved for any additional details that you may do on your farm that are not listed in the pre-defined Details area.

6. To print all procedures press the "Print All" button located on the bottom left of the screen. To print selected procedures, check the ones you want then click the "Print Selected" button.

7. To save your changes do one of the following:
   a. "Save and Next" will save changes and proceed to the next Procedure
   b. "Save and Previous" will save changes and proceed to the previous Procedure
   c. Using the "Review/Add SOP" dropdown list (**highlighted in green above**), select the Procedure you want to Review or Add. The current Procedure will be automatically saved. Note that items bolded are already part of your SOP. Non bolded are not.

   d. "Save and Exit" will save changes and allow you to exit the SOP Wizard