

BSI Engage Presentation

2024-10-24

Recorded by Jessica Stahl

Organized by Jessica Stahl

Audio	Visual
No sound	The screen shows NIDDKCR2 Login page of BSI Engage. There are open text fields under each header of Username and Password fields to fill in the website pfm-engage.bsisystems.com/niddkcr2/login/. The fields are populated with appropriate credentials. There is a “Login” button and a “Forgot Password” button.
Hello. This is a step-by-step demonstration for submitting shipment notifications for BSI Engage. To begin, you will go to the BSI Engage website and enter the provided username and password. Select Login. This will take you to the BSI Engage dashboard.	Cursor clicks “Login” button The screen shows the Dashboard page within the BSI Engage online platform. Left hand panel includes tabs for Dashboard, Specimens, Requisitions, Shipments, Studies, and View Cart. The main window of the Dashboard screen includes a message about an upcoming Downtime Notice on November 2, 2024, a scheduled BSI Launcher Maintenance on October 24, 2024, and a Welcome to BSI! Message.
On the left-hand side, you will find Shipments. Select the plus sign for a new shipment.	Cursor clicks plus button next to the Shipments label.
This will bring you to a new shipment page where you will enter all shipment information.	The screen shows the same tabs in the left-hand panel: Dashboard, Specimens, Requisitions, Shipments, Studies, and View Cart. The main window shows a title of New Shipment. The first line under the titles states Fields marked with an asterisk (*) are required. This page shows seven headers, each with a data field after: Center, Courier, Date Shipped, Notes, Shipment Type, Tracking ID, and Manifest.
Select the plus sign for a new shipment.	Cursor clicks plus button next to the Shipments label.
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	window shows a title of New Shipment. The first line under the titles states Fields marked with an asterisk (*) are required. This page shows seven headers, each with a data field after: Center, Courier, Date Shipped, Notes, Shipment Type, Tracking ID, and Manifest.
First, enter the center that the samples are being shipped from. This is a dropdown menu of all sites listed by network. You may search by network, site number, or city and state. For training, we will use the training site.	The cursor clicks on the field under the Center header and a drop-down menu displays the beginning of an alphabetized list. Presenter types "tra" and the site displays Training PFM 001 Frederick, MD. Presenter selects that option with cursor.
Next, you will select the carrier that will be transporting the samples. This is also a dropdown menu	The cursor clicks on the field under the Courier header and a drop-down menu displays four options: FedEx, UPS, World Courier, USPS. Presenter selects FedEx
Next is the date shipped. The day will be pre-populated for the day you are completing this form. If you need to adjust the date, select in the box and a calendar pop up will appear so that you can adjust the date accordingly.	The screen shows the current date auto populated, 10/24/2004. The presenter clicks on the prepopulated date field and the calendar for October 2024 appears.
Next is the Notes box. This is a free text field where you may enter any additional information we should know about the shipment.	The screen shows the cursor selecting the empty field under the Notes header and typing the word Notes.
Next, is Shipment Type. This is the refrigerant being used during transit, again, a drop-down menu.	The screen shows cursor selecting the dropdown menu under Shipment Type header. Drop down menu appears with five options: Ambient, Wet Ice, Ice Packs, Dry Ice, LN2 Vapor. Presenter selects Dry Ice.
Last, is the tracking number. Here, enter the tracking number from the airway bill	The screen shows cursor selecting the empty field under the Tracking Id header. Presenter types 123456789.
Now we will upload the manifest. Select Choose File and upload accordingly.	The screen shows the bottom portion of the online form with the Manifest header and two sub headers: Filename and Size. There is a "Choose Files" button with a note: "Users are encouraged to create

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	<p>accessible files". Words "Create accessible files" are a hyperlink.</p> <p>The screen shows cursor clicking on Choose File button under the Manifest header and Filename sub header. New screen shows File Explorer open with an excel document in a folder. Presenter selects the excel document titled "Shipment_NIDDK_Manfiest_Demo".</p>
If it's successfully uploaded, the manifest name will be listed.	<p>The screen shows the title of the selected excel document, "Shipment_NIDDK_Manfiest_Demo", in a greyed-out field under the sub header Filename. Under sub header Size, the screen shows document size of 144.5KB. After the Size field is a button labeled Remove.</p>
Last is the Attachment field. Here you may upload any additional attachments if needed	<p>The screen shows the bottom of the online form with the Attachment header and two sub headers: Filename and Size. There is a "Choose Files" button with a note: "Users are encouraged to create accessible files". Words "Create accessible files" are a hyperlink.</p> <p>The last control on the page is a button titled "Submit Shipment" and a button titled "Cancel".</p>
Once all fields are completed, select Submit Shipment	<p>The cursor selects the "Select Shipment" button.</p>
After submitting shipment, a summary page will appear with all information you have entered	<p>The screen shows a new page titled "Shipment I2024:000496". There is a box labeled "Shipment submitted". Header row shows three tabs: Properties, Discrepancies, and Attachments. Under the Properties Header it shows two columns of fields with prepopulated details. In the left column are: Shipment Id (I2024:000496), Created By (jstahl), Tracking Id (123456789) with a hyperlink titled "Track", Date Modified (10/24/2024 04:58 PM), Date Received (blank), Notes (Notes), Condition (blank), Vial Count (0). In the right column are: Shipment Type (Dry Ice), Courier (FedEx), Date Created (10/24/2024 04:58 PM), Date Shipped (10/24/2024), Received By (blank), Center (Training PFM 001 Frederick MD), Shipment Status (In Transit), Active Vials (0).</p> <p>The presenter scrolls down the page to show more of the two columns. In the left column are:</p>

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	Discrepancy Count (0), Manifest (blank), Manifest Name (Shipment_NIDDK_Manfiest_Demo), Received Package Count. In the right column are: Discrepant Vials (0), Manifest Type (XLSX), Expected Completion Date (blank), Shipments Received.