WEB QMS MANUAL

MMS-WQM-201

December 9, 2014

Mireaux Management Solutions

ISO/API Consulting ■ Auditing ■ Training ■ Web QMS

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1.0 PURPOSE AND SCOPE

Mireaux's Web QMS is a compliance software designed specifically to comply with the requirements set forth by the ISO and API international standards. The purpose of this manual is to guide users through all the areas and applications that are part of Web QMS, and provide details on page layout, module management, document structures, page settings, Administrator functions, and authorization of users.

NOTE 1: Only those who have the Administrator role may perform the actions described in some sections marked ADMIN ONLY of this manual.

NOTE 2: Depending on the customization of your Web QMS, the figures shown in this manual may not coincide perfectly with your Web QMS.

2.0 TERMS AND DEFINITIONS

Module	A module is any object on Web QMS that can be edited, including FAQs, Links, Tables, and more.
Application	Is an intricate software program that usually involves a workflow, email notifications, search screen, reports, etc.

3.0 SECURITY ROLES

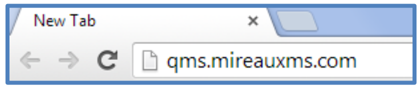
Employee	This is a user who has full access to view information on Web QMS, but limited ability to edit or create records. Employees may only view pages, but cannot edit, add, or delete information. They can create CIPs, enter NCRs, and take E-Learning tests.
Administrator	Full Web QMS Administrator. This user can edit, create, or delete pages, as well as add, edit, or delete modules. Administrators can also authorize users, add roles, view File Manager, clear Logs, and view/clear Recycle Bin.

4.0 INSTRUCTIONS

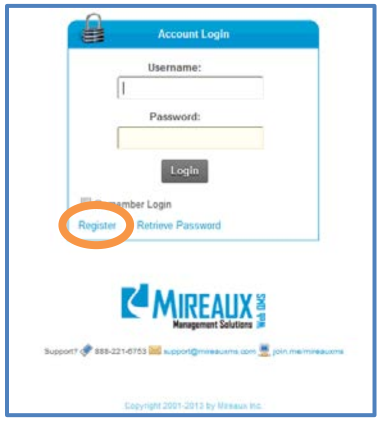
4.1 USER ACCESS FUNCTIONS

4.1.1 User Registration

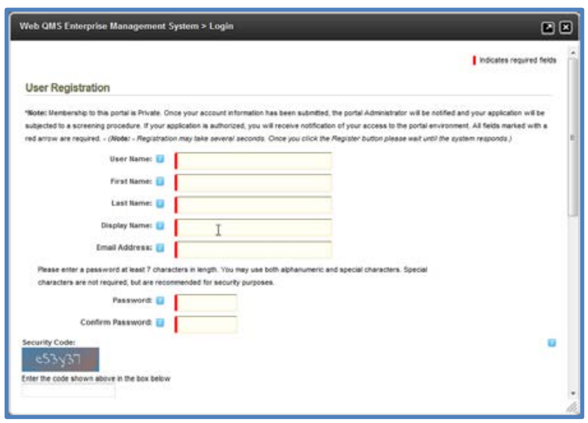
Open a Web browser, such as Internet Explorer, Google Chrome, or Mozilla Firefox. In the address bar, ENTER the URL for your company's Web QMS. This will be http://qms.[Your Company's Name].com. For example:



When the page appears, CLICK **Register**:



The User Registration window will appear.



NOTE: Fields marked with a red asterisk are required.

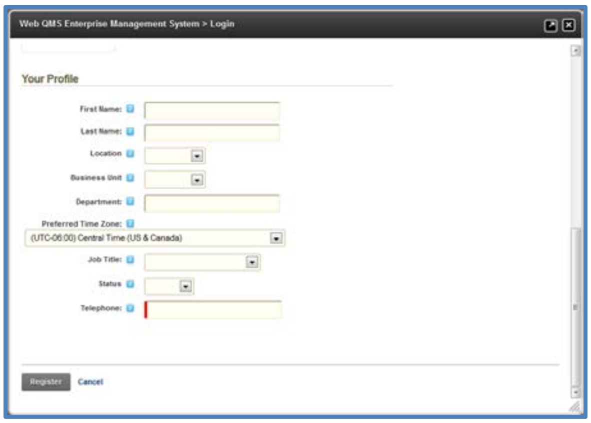
FILL OUT the **following** required fields:

- **User Name:** ENTER **User Name** for the account. Once entered, user names cannot be changed. They must be at least five characters long alphanumeric value.
- **First Name**: ENTER **First** name.
- **Last Name**: ENTER **Last** name.
- **Display Name:** ENTER **Display Name**. This name will appear on the top right corner of Web QMS whenever you are logged in. Typically this is your First Name - space - Last Name.
- **Email Address**: ENTER the **Email Address** you would like to have associated with your Web QMS account.

Once you have completed the registration form, a system notification will be sent to this email account in order to verify your registration and complete the process. Email accounts can belong to the company, or be a Yahoo!, Gmail, or a web service account.

- **Password:** ENTER a **Password** and confirm it in the appropriate fields. Passwords must be at least 7 characters in length. Though it is not required to include non-alphanumeric characters, these characters do strengthen passwords.
- **Security Code:** This is a simple image test designed to impede automated registrations. ENTER the alphanumeric code pictured in the image exactly as shown on your screen. The code changes each time this page is accessed. Do not ENTER in the one shown in Figure above.

Once you have completed the top part of the registration, SCROLL down in the User Registration pop-up window, and FILL OUT information related to your user profile. ENTER this information, as it will improve the functionality of some areas of Web QMS.



NOTE: Fields marked with a red asterisk are required.

Depending on your company, some of these fields will be required:

- **First Name**: ENTER your **First** name.
- **Last Name**: ENTER your **Last** name.
- **Location:** SELECT the **Location** from the drop down menu where you work.
- **Business Unit:** SELECT the **Business Unit** from the drop down menu, if applicable.
- **Department:** ENTER the **Department** to which you belong.
- **Preferred Time Zone:** ENTER the **Time Zone** in which you most often conduct business.
- **Job Title:** SELECT your **Title** from the drop down menu.
- **Status:** SELECT your status (**Active, LOA, Inactive**) from the drop down menu.
- **Telephone:** ENTER your contact **Phone Number** in the field.

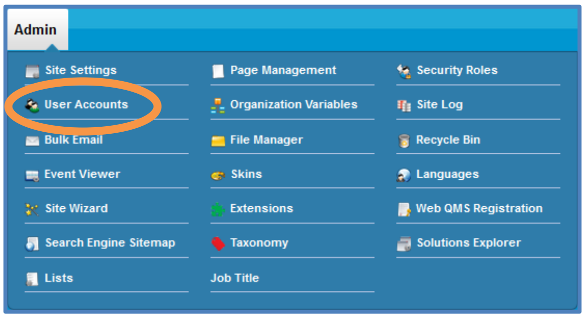
CLICK **Register** when you have completed the form.

You must now wait for an Administrator to authorize your account. This can take anywhere from a few minutes to several hours, depending on the time at which you register. You will receive an email containing the specifics of your registration. Do not confuse this initial email with the authorization email. The initial email is just to let you know that you have registered. You will receive a second email once your account is authorized.

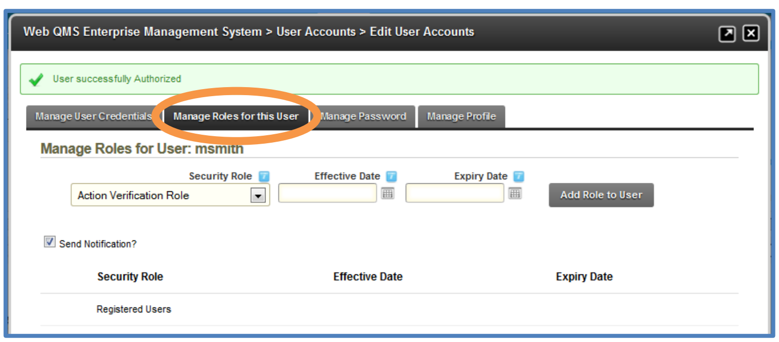
The Administrator is a real person who has to verify that you are indeed an employee of the organization in order to authorize your account and give you the appropriate access rights. Initially, this task is done by Mireaux Management Solutions. Later on, the responsibility for this task is transferred to your organization. Once you receive the second email with your authorization message, you will be able to log in.

4.1.2 Assigning Roles (ADMIN ONLY)

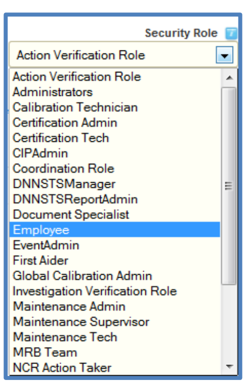
Go to Web QMS, put the mouse cursor over the Admin Tab in the Top Menu, and then SELECT User Accounts from the submenu.

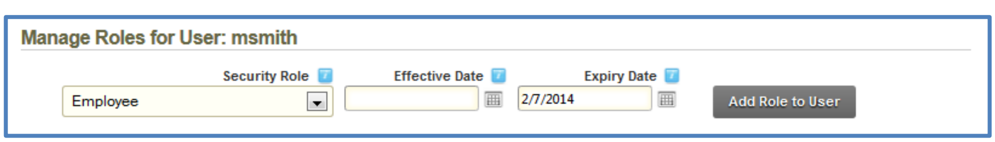


On the Edit User account screen, for the user selected, CLICK the **Manage Roles Tab**. You will see the following screen:

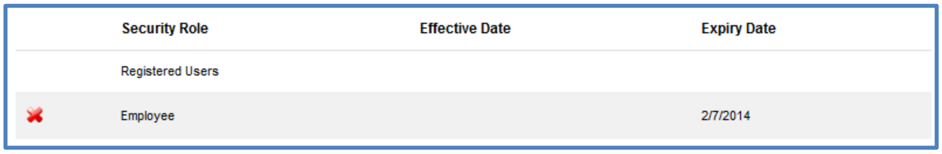


At the bottom of the screen, you will see that this user only has the security role of Registered User. In order for employees to have access to Web QMS, they must be assigned, at minimum, the role of Employee. CLICK the **Security Role** drop down menu, and choose the role of **Employee**. Then CLICK **Add Role to User** for the role to be added.





Now the Employee role is shown in the list of Security Roles.



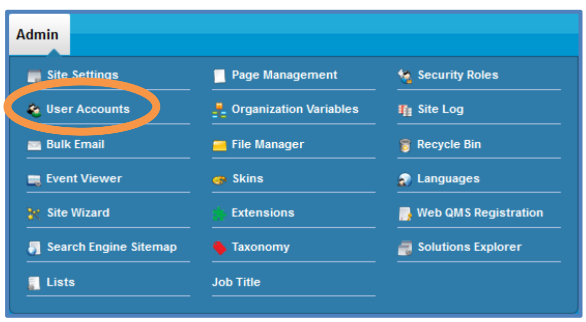
	Security Role	Effective Date	Expiry Date
	Registered Users		
✖	Employee		2/7/2014

You can uncheck the **Send Notification** field if you do not want the admin and user to receive an email notification of the change in security role

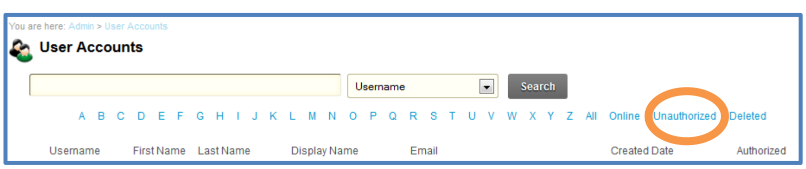
If desired, the user can be granted access for only a limited time. In order to do so, ENTER Effective (start) and Expiry (end) Dates in the text fields to the right of the Security Role menu, then CLICK **Add Role to User** to save the dates. Finally, add any other roles the user may need according to the List of Roles on Section 4.3.1.

4.1.3 Authorizing New Users (ADMIN ONLY)

Web QMS automatically sends an email notification of new registrations to the Administrator who was made "Site" Administrator. If you have not received notification of a new registration through email, it may be necessary to change your email settings to ensure that you receive emails from Web QMS (for more information on how to change the settings in Microsoft Outlook, see Section 4.4). Regardless of your email settings or if you are a Site Administrator, you can always see accounts awaiting authorization on Web QMS. Go to Web QMS, put the mouse cursor over the Admin Tab in the Top Menu, and then SELECT **User Accounts** from the submenu.

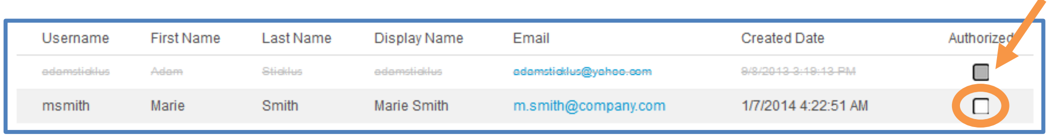


CLICK **Unauthorized** to see the list of Unauthorized Users.



The list of unauthorized users will include new registrations as well as previously registered users who were removed from authorization.

Note the unchecked Authorized box.

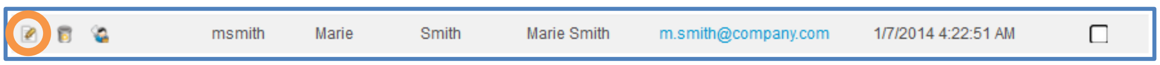


Username	First Name	Last Name	Display Name	Email	Created Date	Authorized
~~adamsticklus~~	~~Adam~~	~~Sticklus~~	~~adamsticklus~~	~~adamsticklus@yahoo.com~~	~~8/8/2013 3:18:13 PM~~	☐
msmith	Marie	Smith	Marie Smith	m.smith@company.com	1/7/2014 4:22:51 AM	☐

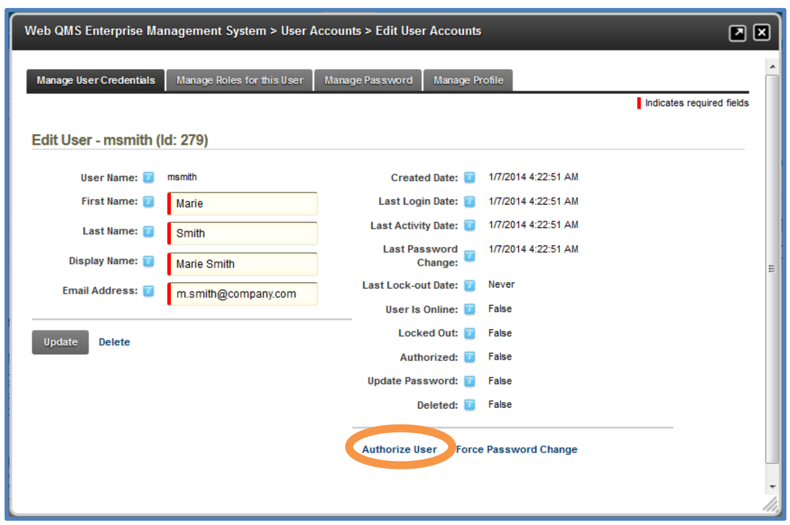
NOTE: Some unauthorized users may have a line striking through their first and last names. These people are usually employees who have been soft deleted for a reason such as if they left the company, and thus should no longer have access to Web QMS. Be sure to check with the Site Administrators, other Administrators, or Department Managers before authorizing any such users!

In the following example, we will authorize Marie Smith. To authorize a user, Web QMS has to be in **Edit** mode. To activate the **Edit** mode, go to the top left corner of the Web QMS screen. You will see **View**, **Edit**, and **Layout** radio buttons. SELECT the **Edit** radio button to enter **Edit** mode.

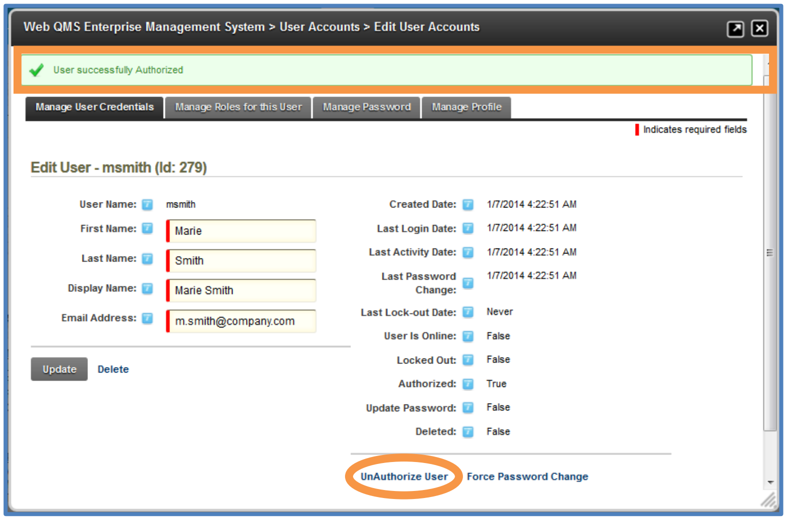
Now that you are on **Edit** mode, you will see three icons next to each name. The **Manage Yellow Pencil icon**, the **Trash Can icon**, and the **Roles icon**. CLICK the **Manage Yellow Pencil icon** on the far left next to the username.



The **Edit User Accounts – Manage User Credentials** page will open.



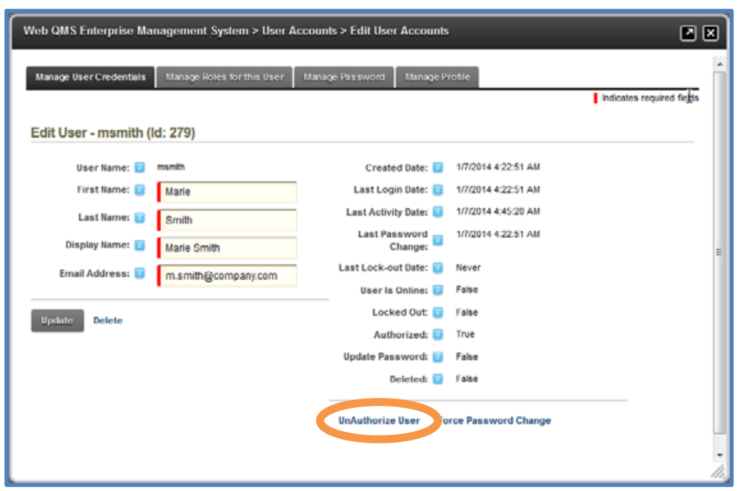
CLICK **Authorize User** at the bottom of the page. Web QMS will confirm that the user has been successfully authorized. The credentials option at the bottom of the page now displays the text **UnAuthorize User**.



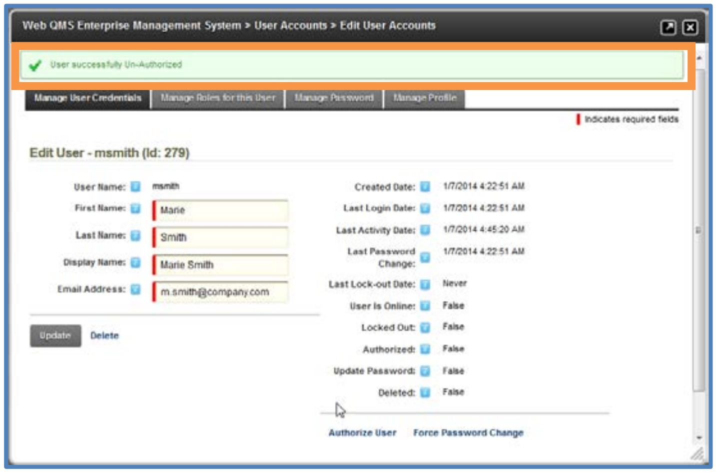
4.1.4 Unauthorizing Users (ADMIN ONLY)

Before unauthorizing a user, make sure to check whether the user has Calibration roles, such as Calibration Tech or Global Calibration Admin. If that is the case, then the user must first be de-assigned from these roles (see Section 4.1.5) before being unauthorized. The reason is because Calibration roles are attached to Location.

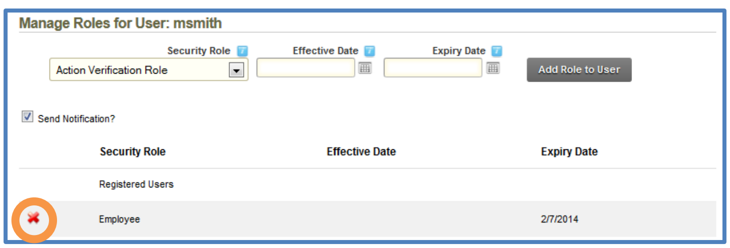
From the **Admin/User Accounts** page, locate the user to be unauthorized, and then CLICK the **Manage Yellow Pencil icon** next to the user's name.



CLICK the **UnAuthorize User** option. The QMS will display a message that the user was successfully unauthorized, and the Authorized box will be unchecked. CLICK **Update** to save the changes.



Next, remove all roles for the user. If this is not done, the user will continue to appear on application lists despite being unauthorized. Just as when adding new roles, go to the **Manage Roles** Tab and CLICK the X for each of the roles you need to remove. If the employee is no longer with the company, be sure that every role is removed.



The **Send Notification** field can be checked or unchecked depending on whether you want the user to receive an email.

4.1.5 Deleting Users (ADMIN ONLY)

In some cases, it may be necessary to remove a user entirely, for example, if the user is a duplicate who was accidentally added twice. In this case, a Hard Delete will be appropriate. However, in other cases, for example, if the user was terminated or left the company, it may be necessary to retain certain records (such as training records), and therefore the employee account must be saved for the period of time established in the Records Retention policy. In such cases, a Soft Delete is preferable. Unlike users who are hard deleted, those who are soft deleted may be reactivated and accessed as needed.

The **Admin/User Account** area displays 5 options next to the list of users, as shown below:

- **Manage Yellow Pencil icon:** Allows you to edit user information.
- **Trash Can icon:** Soft deletes the user.

- **User Roles icon:** Allows you to edit roles assigned to the user.
- **Roll Back icon:** Brings the user back.
- **Red X Delete icon:** Permanently removes the user.

Before a user can be hard deleted, he/she must be soft deleted. CLICK the **Trash Can icon** in order to soft delete him/her. In the below example, Marie Smith will be soft deleted.

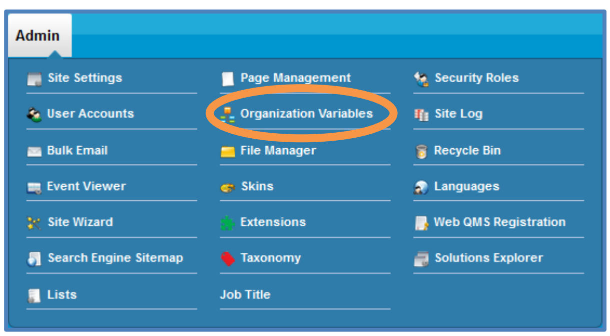
The QMS will display a message to confirm soft deletion. CLICK **OK**. You will now see that the user no longer has the **Trash Can icon**, but has a **Roll Back icon** and a **Red X Delete icon**.

CLICK the **Roll Back icon** to bring the user back. CLICK the **Red X Delete icon** to permanently remove the user.

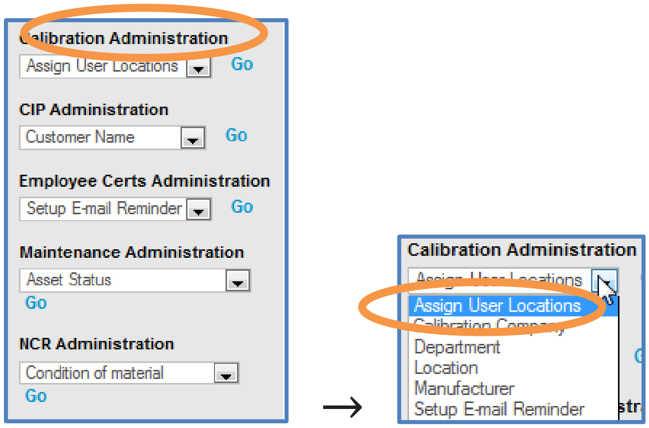
4.1.6 Removing Users from Calibration Locations (ADMIN ONLY)

When a user who has the Calibration Tech or Global Calibration Admin role needs to be removed from the system, you must first check whether the user was assigned to a specific location. Before continuing to remove him/her from the system, you must remove him/her from that location. In the following example, we will remove the user Marie Smith from the Calibration roles.

Go to Organization Variables under Admin Tab.

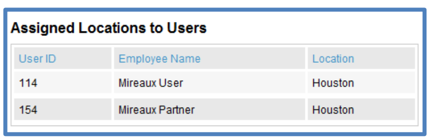


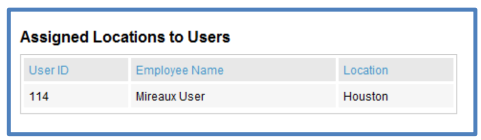
Calibration Administration is located on left menu. From the drop down menu, SELECT **Assign User Locations** and CLICK **Go**.



Ensure that the person to be de-assigned from a location is on the drop down menu. If he/she is not on the drop down menu, return to him/her any roles you had previously removed so that he/she will appear:

Once the user is selected, take notice of the text in red, which reads, "If no location is selected and you SUBMIT, all locations will be removed for the user." Do not pick any location and CLICK **Submit Action**. Here is before and after:





The user is now cleared from the previously assigned locations. Now, go back to the User Accounts and remove the calibration roles. These steps were outlined in the section, "Unauthorizing Users."

Troubleshooting Advice:

- If users do not show up on the **Assigned Locations** list at the bottom, but they do show up on the drop down menu at the top, then remove the role of Cal Admin or Cal Tech from them. Then they will not appear on the list afterward.
- If they do show on the **Assigned Locations** list at the bottom but not at the top, then bring them back as Cal Tech or Cal Admin so that they show at the top. Then proceed to remove them from the assigned location (following the above steps) and then remove the Cal Tech or Cal Admin role so that they will not appear on the top or bottom.
- If they appear on both the top and bottom list, remove them from the assigned location (following the above steps) and then remove the role of Cal Tech or Cal Admin from them.

4.1.7 Login

Go to your Web QMS. You will see the login screen there. ENTER in your **User Name** and **Password** in the blanks on the page. CLICK **Login**.

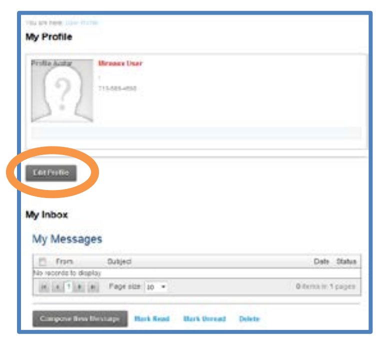
Once you login, you will be directed to the homepage of Web QMS which is composed of the sections depicted in section 4.2.

If you go to your Web QMS and you do not see the login screen, but rather the Web QMS logo, then you are already logged in. CLICK the logo and you will be able to access the site.

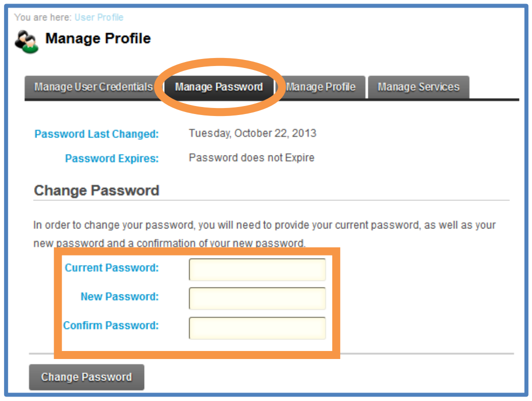
4.1.8 Resetting your Password

Go to your Quality Management System site. Log in using your user name and password. Once logged in, CLICK **Your Name** in the upper right corner of the screen.

In the next screen, CLICK **Edit Profile**.



The Manage Profile screen opens. CLICK **Manage Password**. FILL OUT the three fields at the bottom to reset your password. Web QMS passwords are case-sensitive, and the screen will not show what you are typing here, so make sure your Caps Lock is off to avoid any later confusion.



CLICK **Change Password** to save your changes.

4.2 PAGE LAYOUT AND ORGANIZATION OF WEB QMS

The Web QMS layout consists of five main panes. These panes appear throughout the entire Web QMS, though the particular contents of some panes vary depending on the area currently being viewed. The **Top Edit Pane** is only visible to users who hold an Administrator role, but anyone with access to Web QMS can view all other panes.

a. **Header Pane:** The **Header Pane** contains the Web QMS icon, the company logo, the date at time of use, and the Logout button. CLICKING on the Web QMS icon on the leftmost side of the Header Pane will bring you back to the welcome page or dashboard of Web QMS.

b. **Top Menu:** The **Top Menu** contains links to the main areas within Web QMS, such as Quality, Document Control, etc. CLICKING directly on these links will open the main page for the pertinent area. When the cursor is merely placed above any one of the links, a drop down menu containing links to subareas will appear.

You can access the pages, applications, and modules of Web QMS by selecting different tabs on the Top Menu at the top of the homepage. The tabs on the Top Menu may vary depending on the version and specific configuration of your Web QMS. The most frequently used tabs are **Quality**, **Document Control**, **Operations**, and **Human Resources**.

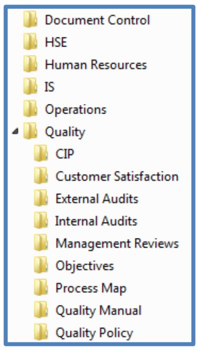
c. **Left Pane:** The **Left Pane** displays submenu options for each of the areas listed on the Top Menu. These links are the same ones accessible through the drop down menus in the Top Menu. Additionally, below these links, there appears a Signature Section, which contains the Email Us button that can be used to send comments or questions to the assigned page owner.

d. **Content Pane:** The **Content Pane** displays all content linked to in the Header and Left Panes. This is where all documents and modules can be viewed.

e. **Top Edit Pane:** The **Top Edit Pane** allows Administrators to toggle between different modes, as shown in figure below. View Mode displays the contents of Web QMS precisely as viewers with ordinary Employee roles see them. As its name implies, Edit Mode allows users to alter the contents of pages on Web QMS. Edit Mode is only available to users who have been assigned the role of Administrator. Similarly, Layout Mode can only be seen by Administrators. Layout Mode offers the opportunity to alter the placement of modules within a page.

4.2.1 Directory Structure on Local Servers

In order to optimize your Management System, it is recommended that documents on local servers mirror the general organization of Web QMS as much as possible. That is, all files should be organized in folders and subfolders that match the menus and submenus to be found for each page present on Web QMS. The figure below on the left, offers an example of a local directory that has been organized to match Web QMS.



4.3 ROLES

4.3.1 User Roles

Below are the User Roles that may be assigned to Web QMS users.

Master Documents Application:	
USER ROLE	**DESCRIPTION**
Administrator	Full Web QMS Enterprise Administrator. Can edit, create, or delete pages. Can add, edit, or delete modules to pages. Can authorize users, add roles, view File Manager, Clear Logs, and View/Clear Recycle Bin.
Document Specialist	This role is responsible for managing all documents in the Master Documents Application.
Employee	The Employee role has full access to view information on Web QMS, but has limited ability to edit or update records. Employees may only create CIPs, enter NCRs, and take E-Learning tests.

Employee Certification Application:	
USER ROLE	**DESCRIPTION**
Certification Admin	This role can edit, delete and update certification types as well as certificate information from each employee. They will receive reports for all employees and all sites.
Certification Tech	This role can edit and update certification types and user information, but not delete. They will receive reports for the employees that belong to the site they have been assigned to.

E-Learning Application:	
USER ROLE	**DESCRIPTION**
DNNSTSReportAdmin	Training role which gives visibility to Training Reports to see training records for all users, not just for him/herself.
TrainingSuperAdmin	This user has full Administrator access to the E-Learning Application.

Training Events Application:	
USER ROLE	**DESCRIPTION**
DNNSTSManager	Training role with full administrative privilege to all Training and E-Learning menus, records, and reports.
DNNSTSReportAdmin	Training role which gives visibility to Training Reports to see training records for all users, not just for him/herself.
EventAdmin	This user has full Administrator access of the Training Events Application.

Maintenance Application:	
USER ROLE	**DESCRIPTION**
Maintenance Admin	This role has full Administrator permission within the Maintenance Application, including adding, editing, and removing assets from the system; issuing and processing the work orders through all of the stages; and setting up preventive maintenance.
Maintenance Supervisor	This role will be able to view asset status, add PM repair info, view usage info, and process work orders.
Maintenance Tech	This role can issue work orders, and process the work orders through pending and repair stage. This role can also conduct Preventive Maintenance based on established PMs.

Calibration Application:	
USER ROLE	**DESCRIPTION**
Calibration Technician	Calibration role with the ability to enter and edit calibration equipment and calibration certificates, but not delete.
Global Calibration Admin	Users in this role have the ability to enter, edit, or delete calibration equipment and calibration certificates. They can assign calibration technicians to specific locations and set reminder timeframe.

CIP Application:	
USER ROLE	**DESCRIPTION**
Action Verification Role	This role can verify that CIP actions have indeed been physically taken, and approve or reject each response as adequate.
CIP Admin	CIP role with full administrative privilege to all CIP menus and records. Can edit, delete, and manipulate all aspects of a CIP.
Coordination Role	CIP role with authority to accept or reject a CIP. If accepted, then he/she coordinates CIP by assigning it to an investigator(s). Coordinator can also fill out the containment portion or assign it to someone else.
Investigation Verification Role	CIP role with authority to review proposed root cause analysis and actions and approve/disapprove each investigation response.
Validation Role	CIP role with authority to verify that the original problem did not re-appear and to close the CIP as applicable.

NCR Application:	
USER ROLE	**DESCRIPTION**
MRB Team	NCR role to review the disposition of an NCR and approve or reject the disposition.
NCR Action Taker	This user performs the actions for NCRs based on the disposition assigned.
NCR Coordinator or MRB Admin	This role can accept or reject an NCR. If acceptable then he/she coordinates NCRs by assigning to MRB Routing or Action Taker. In some versions of Web QMS, this role is called NCR Coordinator, in other versions this role is called MRB Admin.

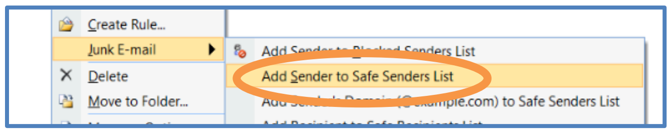
Other Roles:	
USER ROLE	**DESCRIPTION**
CSIRT	Only role other than Admin to be able to view "Restricted" Knowledge Access CIP (chosen when Source = Security Incident). Not currently in use.
First Aider	This role is used in CIP source = safety incident, treatment = yes under CIP Investigation.
Inventory Role	This role will conduct the action for the NCRs that have the disposition of Remake.
Operations Role	This role will conduct the action for the NCRs that have disposition of Rework, Downgrade, Use As Is, and Scrap.
Purchasing Role	This role will conduct the action for the NCRs that have disposition of Return to Vendor.
Quality Role	This role will conduct the action for the NCRs that have the disposition of Recall.
Risk Assessment Verifier	This role verifies that the risk assessment conducted is acceptable.

4.4 EMAIL SETTINGS

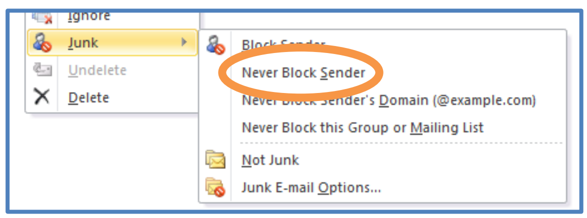
In order to receive email from Web QMS, make sure that email addresses associated with Web QMS, particularly admin@webbasedqms.com, are marked as safe senders within your chosen email client.

There are two ways to set the sender as safe in Microsoft Outlook:

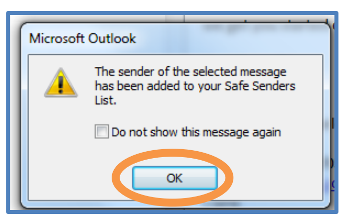
- Go to the Inbox or the junk email box, where the Web QMS emails will be if they have already been perceived as spam by the email client.
- LOCATE the **email** and right CLICK on it. SCROLL down to **Junk Email** and CLICK **Add Sender to Safe Senders List**.



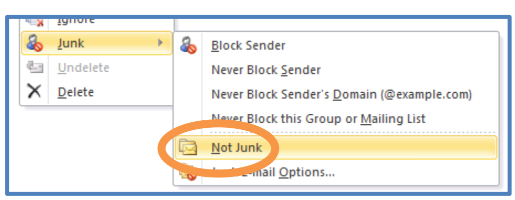
Depending on the version of Outlook, **Never Block Sender** may be the appropriate choice from the list instead.



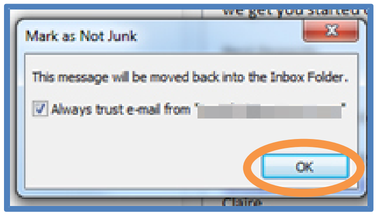
Outlook will display a message saying that the sender has been added to the list of Safe Senders. CLICK **OK** to save the setting.



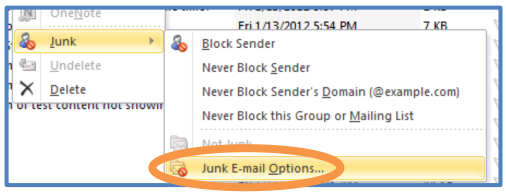
Once the sender has been added to the Safe Sender List, move the junk email back into the Inbox by right CLICKING on the email. SCROLL down and CLICK **Not Junk** from the menu.



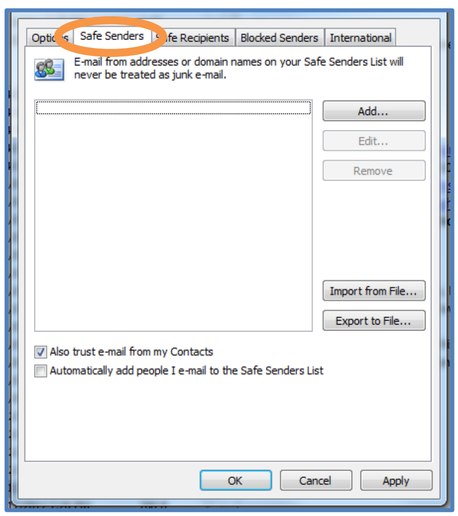
CLICK **OK** on the resulting notification to confirm that the email is not junk.



Alternatively, the Junk Option can be used to add the email address to the Safe Sender List in Outlook. To access the Junk Option, RIGHT-CLICK any **Email** in the Inbox. SCROLL down and SELECT **Junk Email Options**.



In the resulting pop up window, SELECT from the tabs at the top. Copy and paste or ENTER the email address in the text field next to the **Add** button. Then CLICK **Add**.

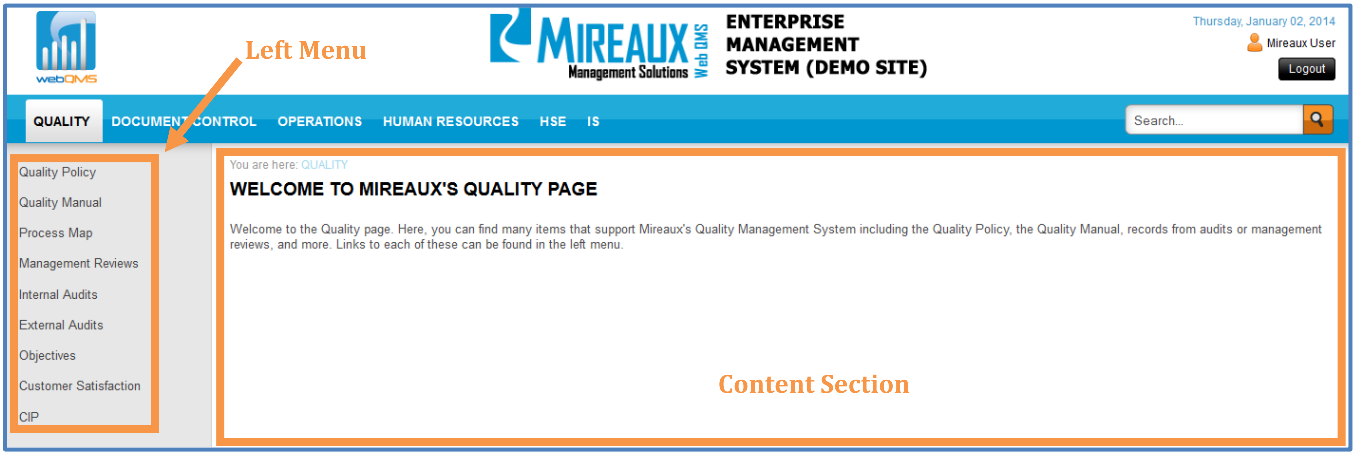


CLICK **OK** to save the settings.

4.5 QUALITY TAB

CLICK the **Quality Tab** to access the Quality pages.

The **Quality** page typically looks similar to this:

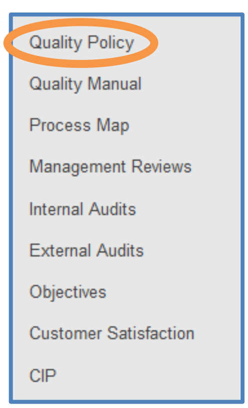


On the Left Menu all available subpages are listed. These subpages may vary depending on the version and specific configuration of your Web QMS. The center section of the page is reserved for the company announcement.

You can also access the subpages by CLICKING the page titles from the Top Menu of the Quality Tab as shown:

4.5.1 Quality Policy

CLICK **Quality Policy** from the Left Menu or the Top Menu of the Quality Tab.



You will see the company's Quality Policy shown on the screen.


QUALITY AND INFORMATION SECURITY POLICY

At Mireaux Management Solutions, we strive to achieve client satisfaction through our commitment to IMPROVE.

- I increase awareness of information security
- M meet client, statutory, and regulatory requirements
- P provide value added products and services to our clients
- R risk assess our assets to prevent and mitigate threats
- O ongoing improvement of our processes and products
- V value our employees as our greatest assets
- E excel in everything we do

By applying these concepts to our ISO/API Consulting, Auditing, Training, Document Control and Web QMS software, we fully commit ourselves to helping our clients achieve their own ISO and API goals.

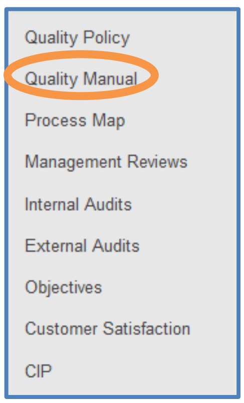
Miriam Boudreaux
President
Mireaux Management Solutions

January 4, 2014

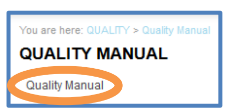
For information on how to edit this module go to the **Editing Modules** section of this manual.

4.5.2 Quality Manual

CLICK **Quality Manual** from the Left Menu or the Top Menu of the Quality Tab.



In some cases the Quality Manual opens a page with the Quality Manual link.

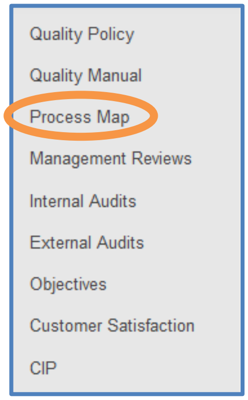


In other cases, the link takes you directly to the document.

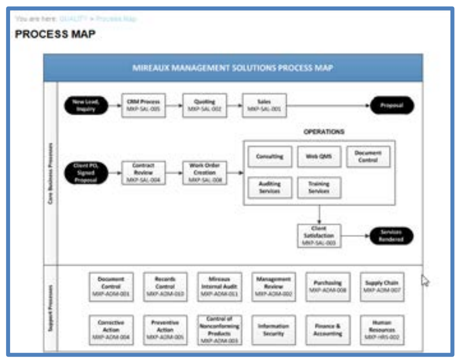
For information on how to edit this module go to the **Editing Modules** section of this manual.

4.5.3 Process Map

CLICK **Process Map** from the Left Menu or the Top Menu of the Quality Tab.



You will see the company Process Map shown on the screen.

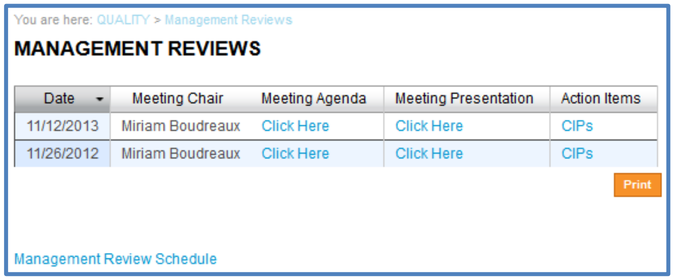


For information on how to edit this module go to the **Editing Modules** section of this manual.

4.5.4 Management Reviews

CLICK **Management Reviews** from the Left Menu or the Top Menu of the Quality Tab.

You will see the Management Review records shown on the screen, including Agendas, Presentations, and a link to the Action Items on the CIP Application, as well as a link to the Management Review Schedule.

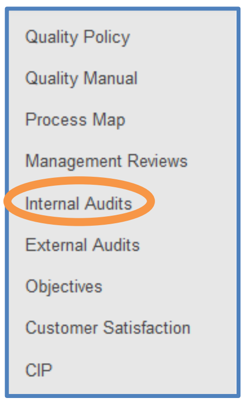


For information on how to edit this module go to the **Editing Modules** section of this manual.

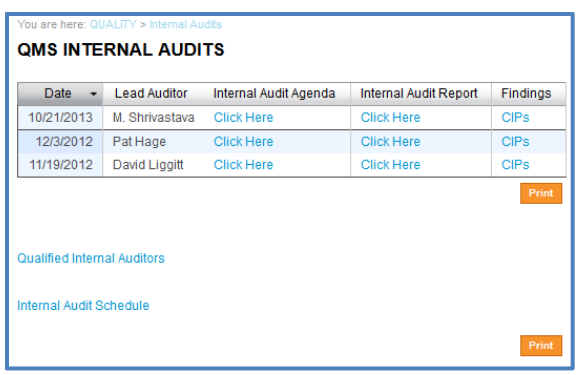
For more information on how to create or edit the link to CIPs see the "Link to CIP" user guide.

4.5.5 Internal Audits

CLICK **Internal Audits** from the Left Menu or the Top Menu of the Quality Tab.



You will see the records of Internal Audits shown on the screen such as Internal Audit Agenda, Internal Audit Reports, and CIPs, as well as a link to the **Internal Audit Schedule** and **Qualified Auditors**.

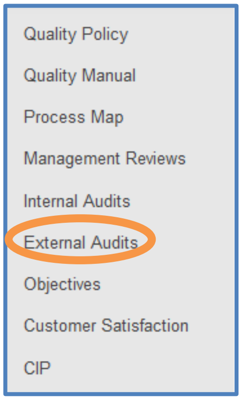


For information on how to edit this module go to the **Editing Modules** section of this manual.

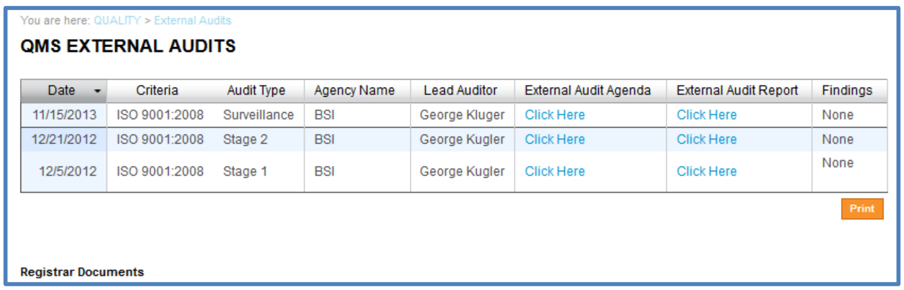
For more information on how to create or edit the link to CIPs see the "Link to CIP" user guide.

4.5.6 External Audits

CLICK **External Audits** from the Left Menu or the Top Menu of the Quality Tab.



You will see the records of External Audits shown on the screen, such as External Audit Agendas, External Audit Reports, and a link to the CIPs, as well as the related documents.


You are here: QUALITY > External Audits

QMS EXTERNAL AUDITS

Date	Criteria	Audit Type	Agency Name	Lead Auditor	External Audit Agenda	External Audit Report	Findings
11/15/2013	ISO 9001:2008	Surveillance	BSI	George Kluger	Click Here	Click Here	None
12/21/2012	ISO 9001:2008	Stage 2	BSI	George Kugler	Click Here	Click Here	None
12/5/2012	ISO 9001:2008	Stage 1	BSI	George Kugler	Click Here	Click Here	None

Print

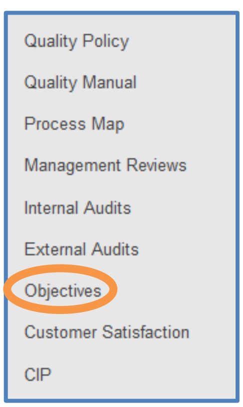
Registrar Documents

For information on how to edit this module go to the **Editing Modules** section of this manual.

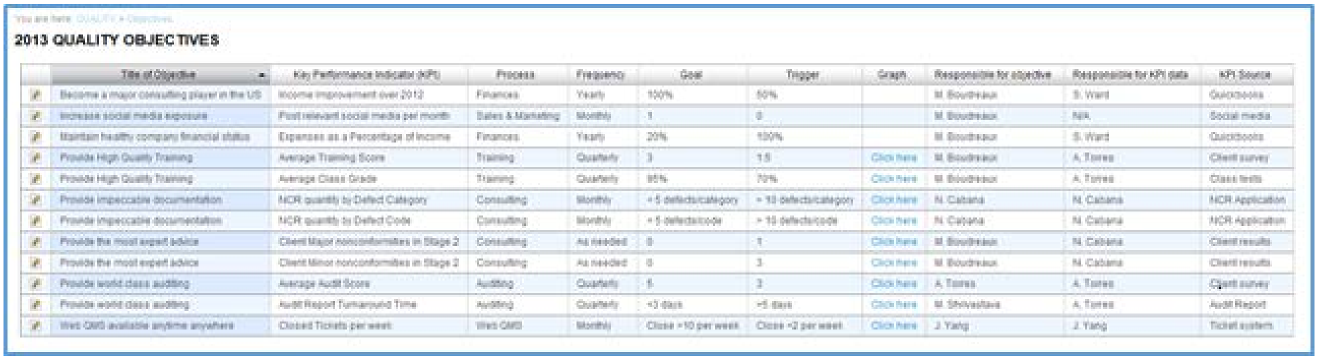
For more information on how to create or edit the link to CIPs see the “Link to CIP” user guide.

4.5.7 Objectives

CLICK **Objectives** from the Left Menu or the Top Menu of the Quality Tab.



You will see the Quality Objectives shown on the screen. In some cases the Objectives may be links to MS Excel Spreadsheets. In other cases they may be direct links to KPI charts within Web QMS applications.



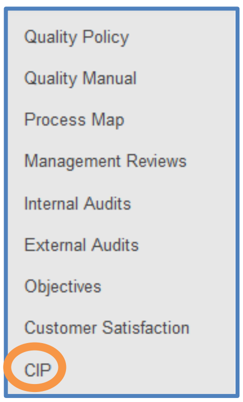
You are here: QUALITY > Objectives

2013 QUALITY OBJECTIVES

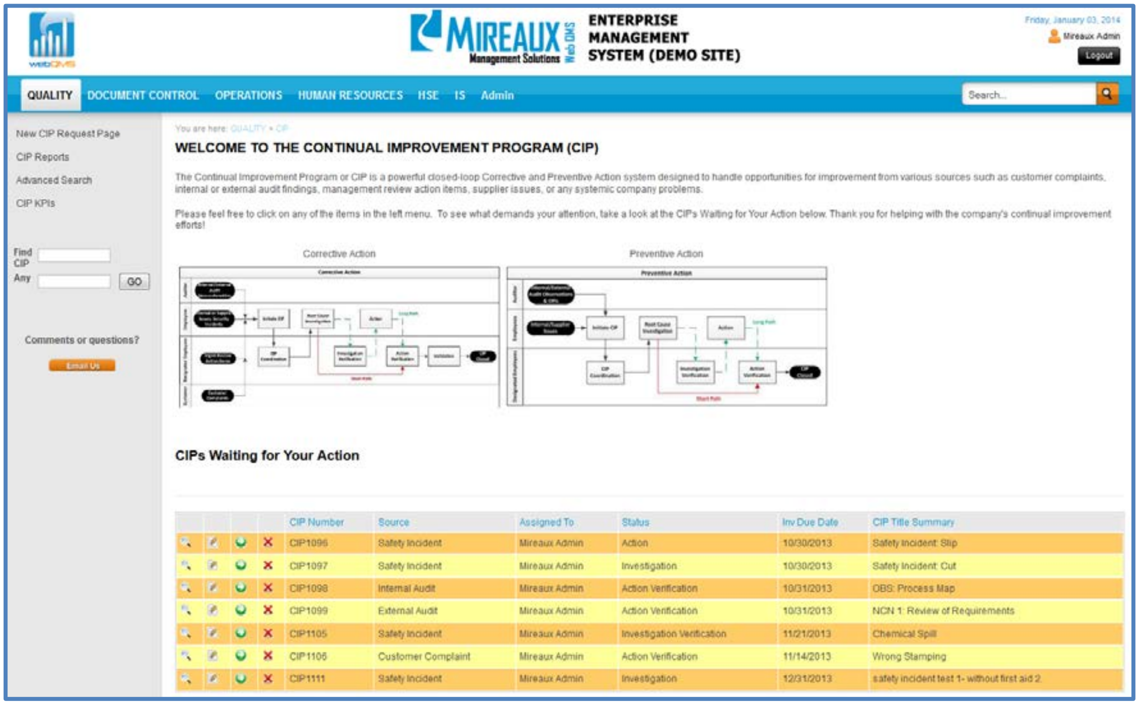
	Title of Objective	Key Performance Indicator (KPI)	Process	Frequency	Goal	Trigger	Graph	Responsible for objective	Responsible for KPI data	KPI Source
	Become a major consulting player in the US	Income improvement over 2012	Finances	Yearly	100%	50%		M. Boudreaux	S. Ward	Quickbooks
	Increase social media exposure	Post relevant social media per month	Sales & Marketing	Monthly	1	0		M. Boudreaux	N/A	Social media
	Maintain healthy company financial status	Expenses as a Percentage of Income	Finances	Yearly	20%	100%		M. Boudreaux	S. Ward	Quickbooks
	Provide High Quality Training	Average Training Score	Training	Quarterly	3	1.5	Click here	M. Boudreaux	A. Torres	Client survey
	Provide High Quality Training	Average Class Grade	Training	Quarterly	85%	70%	Click here	M. Boudreaux	A. Torres	Class tests
	Provide impeccable documentation	NCR quantity by Defect Category	Consulting	Monthly	< 5 defects/category	> 10 defects/category	Click here	N. Cabana	N. Cabana	NCR Application
	Provide impeccable documentation	NCR quantity by Defect Code	Consulting	Monthly	< 5 defects/code	> 10 defects/code	Click here	N. Cabana	N. Cabana	NCR Application
	Provide the most expert advice	Client Major nonconformities in Stage 2	Consulting	As needed	0	1	Click here	M. Boudreaux	N. Cabana	Client results
	Provide the most expert advice	Client Minor nonconformities in Stage 2	Consulting	As needed	0	3	Click here	M. Boudreaux	N. Cabana	Client results
	Provide world class auditing	Average Audit Score	Auditing	Quarterly	5	3	Click here	A. Torres	A. Torres	Client survey
	Provide world class auditing	Audit Report Turnaround Time	Auditing	Quarterly	<3 days	>5 days	Click here	M. Shrivastava	A. Torres	Audit Report
	Web QMS available anytime anywhere	Closed Tickets per week	Web QMS	Monthly	Close >10 per week	Close <2 per week	Click here	J. Yang	J. Yang	Ticket system

4.5.8 CIP Application

CLICK **CIP** from the Left Menu or the Top Menu of the Quality Tab.



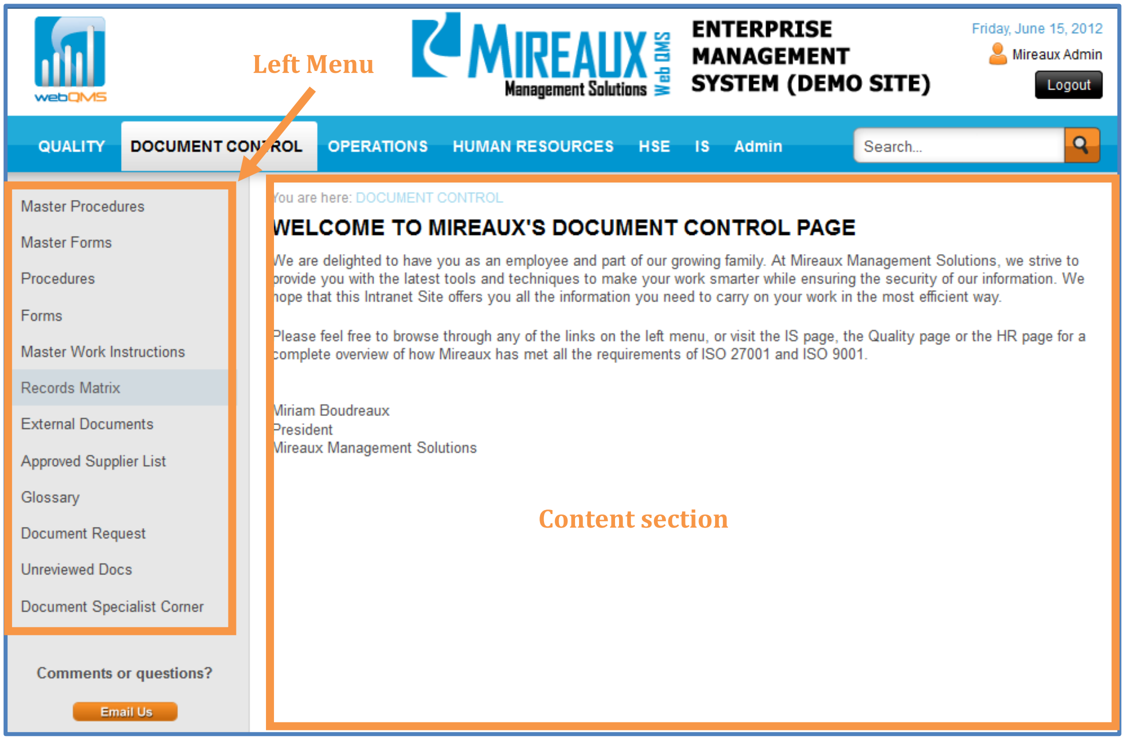
You will be directed to the CIP Application. To learn more information about how to use the CIP Application, refer to the **CIP Application Manual**.



4.6 DOCUMENT CONTROL TAB

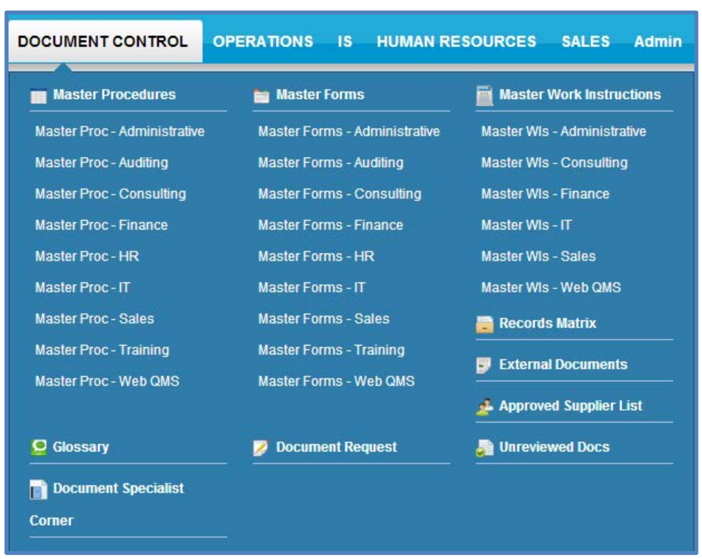
CLICK the **Document Control** Tab to access the Document Control pages.

The **Document Control** page typically looks similar to this:



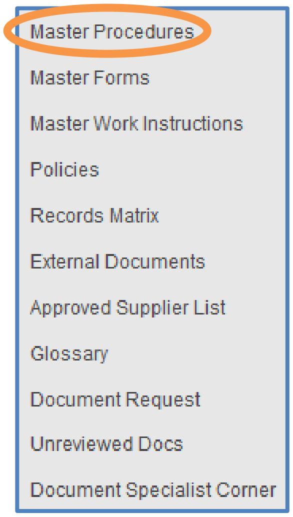
Similar to the **Quality** page, all available subpages are listed in the Left Menu. The center section of the page is reserved for the company announcement. Depending on your Web QMS, your company's Left Menu may be structured slightly differently.

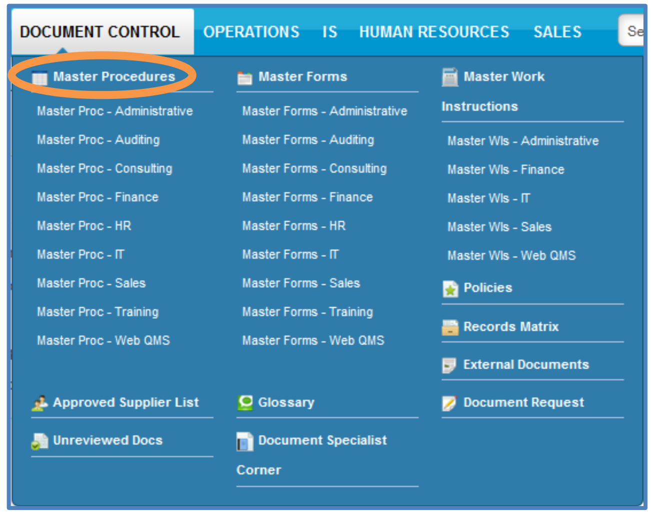
You can also access the subpages by CLICKING the page titles from the drop down menu of the Document Control Tab.



4.6.1 Procedures

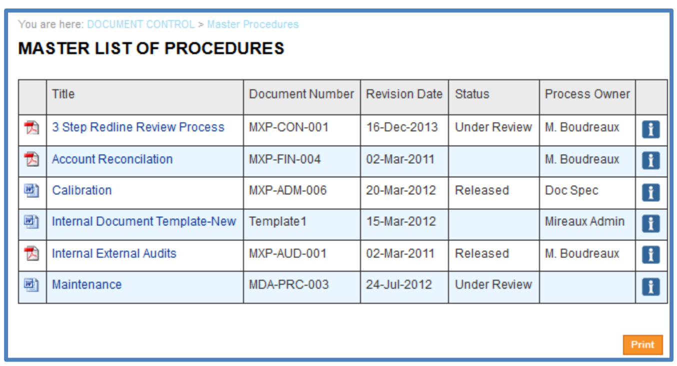
CLICK **Master Procedures** from the Left Menu or the Top Menu of the Document Control Tab.





You will be directed to the **Master Procedures** page. All the documents available to you will be shown on the page, similar to this:

Master Documentation



You are here: DOCUMENT CONTROL > Master Procedures

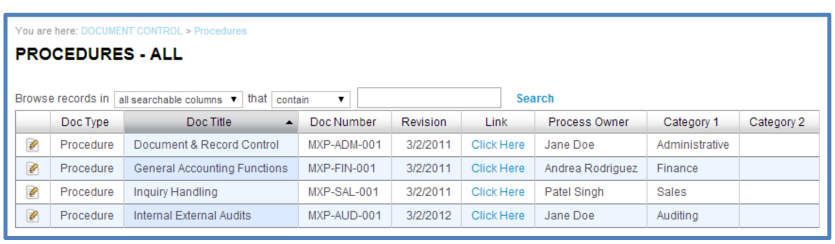
MASTER LIST OF PROCEDURES

	Title	Document Number	Revision Date	Status	Process Owner	
	3 Step Redline Review Process	MXP-CON-001	16-Dec-2013	Under Review	M. Boudreaux	
	Account Reconcilation	MXP-FIN-004	02-Mar-2011		M. Boudreaux	
	Calibration	MXP-ADM-006	20-Mar-2012	Released	Doc Spec	
	Internal Document Template-New	Template1	15-Mar-2012		Mireaux Admin	
	Internal External Audits	MXP-AUD-001	02-Mar-2011	Released	M. Boudreaux	
	Maintenance	MDA-PRC-003	24-Jul-2012	Under Review		

Print

If you don't have the Master Documentation Application, the **Procedures** page will look similar to this:

Basic Documentation



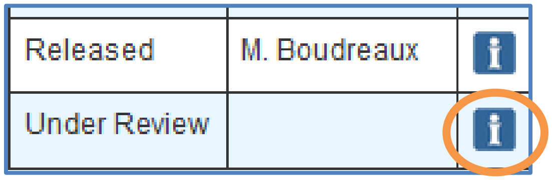
You are here: DOCUMENT CONTROL > Procedures

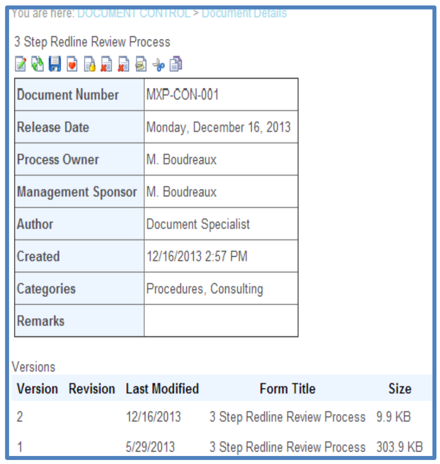
PROCEDURES - ALL

Browse records in all searchable columns that contain Search

	Doc Type	Doc Title	Doc Number	Revision	Link	Process Owner	Category 1	Category 2
	Procedure	Document & Record Control	MXP-ADM-001	3/2/2011	Click Here	Jane Doe	Administrative	
	Procedure	General Accounting Functions	MXP-FIN-001	3/2/2011	Click Here	Andrea Rodriguez	Finance	
	Procedure	Inquiry Handling	MXP-SAL-001	3/2/2011	Click Here	Patel Singh	Sales	
	Procedure	Internal External Audits	MXP-AUD-001	3/2/2012	Click Here	Jane Doe	Auditing	

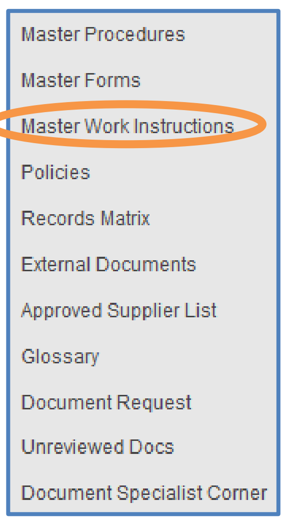
For the **Master Documentation** page, you will be able to access all documents and view the revision information of the documents by CLICKING in the **Information icon/CLICK here** next to the document of your choice.

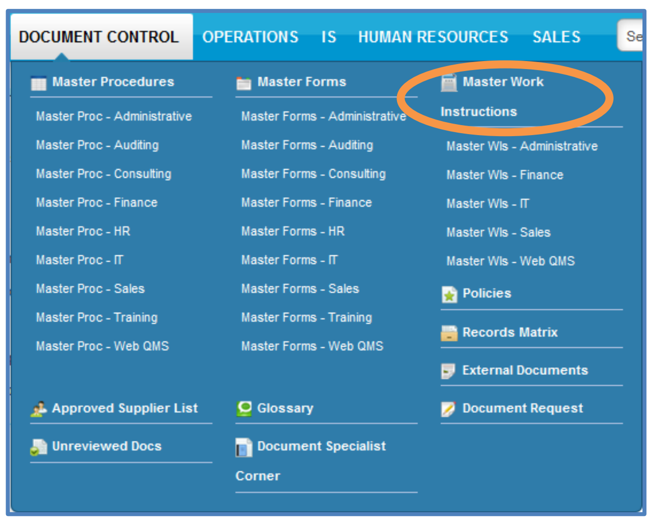




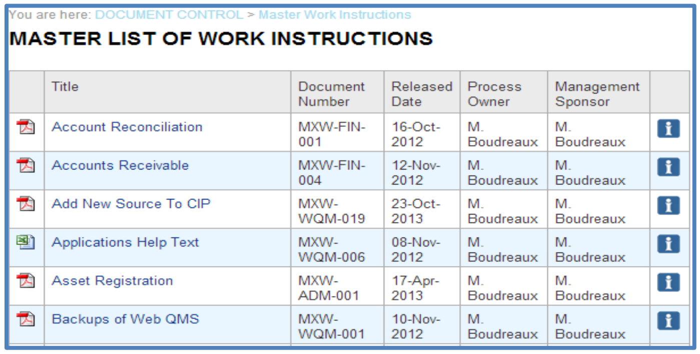
4.6.2 Work Instructions

CLICK **Master Work Instructions** from the Left Menu or the Top Menu of the Document Control Tab.





You will be directed to the **Work Instructions** page. All the documents available to you will be shown on the page, similar to this:



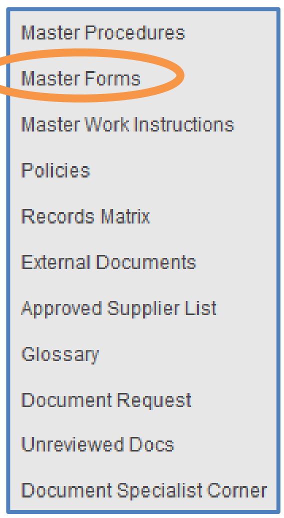
You are here: DOCUMENT CONTROL > Master Work Instructions

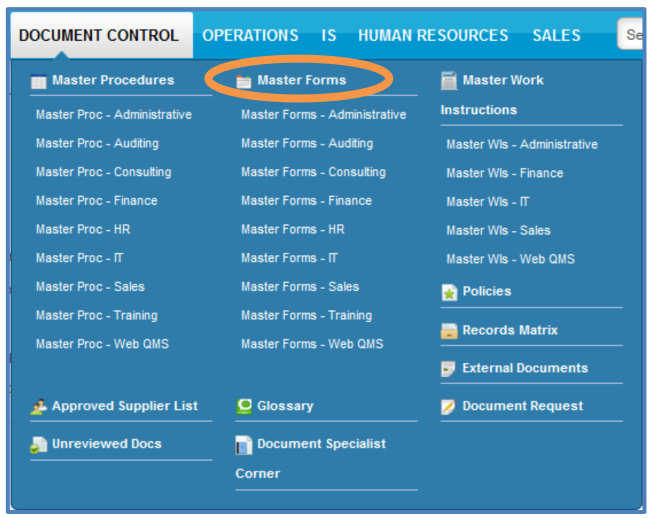
MASTER LIST OF WORK INSTRUCTIONS

	Title	Document Number	Released Date	Process Owner	Management Sponsor	
	Account Reconciliation	MXW-FIN-001	16-Oct-2012	M. Boudreaux	M. Boudreaux	
	Accounts Receivable	MXW-FIN-004	12-Nov-2012	M. Boudreaux	M. Boudreaux	
	Add New Source To CIP	MXW-WQM-019	23-Oct-2013	M. Boudreaux	M. Boudreaux	
	Applications Help Text	MXW-WQM-006	08-Nov-2012	M. Boudreaux	M. Boudreaux	
	Asset Registration	MXW-ADM-001	17-Apr-2013	M. Boudreaux	M. Boudreaux	
	Backups of Web QMS	MXW-WQM-001	10-Nov-2012	M. Boudreaux	M. Boudreaux	

4.6.3 Forms

CLICK **Master Forms** from the Left Menu or the Top Menu of the Document Control Tab.





You will be directed to the **Forms** page. All the documents available to you will be shown on the page, similar to this:

Master Documentation

You are here: DOCUMENT CONTROL > Master Forms

MASTER LIST OF FORMS

	Title	Document Number	Revision Date	Status	Process Owner	
	Accounting Checklist	MXF-FIN-103	02-Mar-2011		M. Boudreaux	
	AgendaWebQMSPresentation	m001	30-Nov-2011		M.Boudreaux	
	AttenanceSheet	2012-A-102	05-Jun-2012		Mireaux Admin	
	Background Check	MXF-HRS-108	20-Jun-2011		M. Boudreaux	
	ConsultingClientProfile	MXF-CON-001	13-Nov-2012		Scruff McGruff	
	Course Registration	MXF-TRN-103	02-Mar-2011		M. Boudreaux	
	General Attendance Form	MXF-SAL-104	02-Mar-2011		M. Boudreaux	
	ISO9001 Readiness Checklist	MXF-CON-109	02-Mar-2011		M. Boudreaux	
	IT Log	MXF-MIS-101	02-Mar-2011		M. Boudreaux	
	Letter Format	MXF-ADM-103	02-Mar-2011	Released	M. Boudreaux	
	Management Review Agenda	MXF-ADM-101	02-Mar-2011		M. Boudreaux	
	Process Analysis Worksheet	MXF-AUD-107	02-Mar-2011		M. Boudreaux	

Print

Basic Documentation

You are here: DOCUMENT CONTROL > Forms

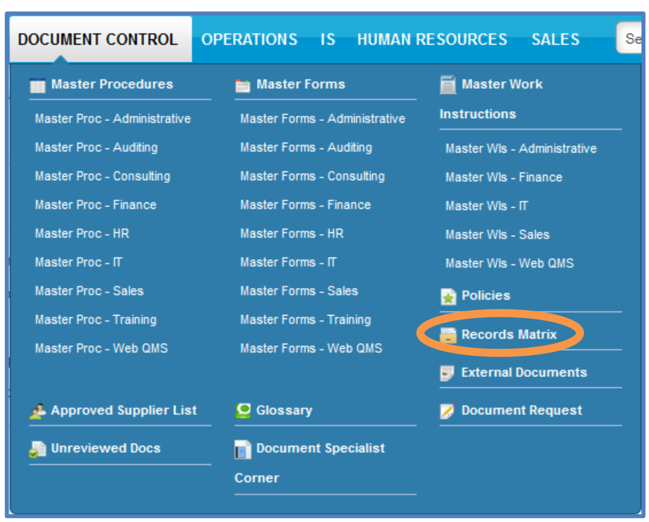
FORMS

	Form Title	Form Number	Revision Date	Form	Owner	Mgmt Sponsor
	5-Year Internal Audit Plan	MXF-AUD-105	3/2/2011	click here	M. Boudreaux	M. Boudreaux
	Accounting Checklist	MXF-FIN-103	3/2/2011	click here	M. Boudreaux	M. Boudreaux
	Agenda Web QMS Presentation	MXF-SAL-102	3/2/2011	click here	M. Boudreaux	M. Boudreaux
	Course Instructor Evaluation	MXF-TRN-101	3/2/2011	click here	M. Boudreaux	M. Boudreaux

To learn more information about the Master Documentation Application, refer to the **Master Documents Application Manual**.

4.6.4 Records Retention Matrix

CLICK **Records Matrix** from the Left Menu or the Top Menu of the Document Control Tab.



You will be directed to the **Records Matrix** or **Records Retention** page. All the documents available to you will be shown on the page, similar to this:

You are here: DOCUMENT CONTROL > Records Matrix

RECORDS RETENTION MATRIX

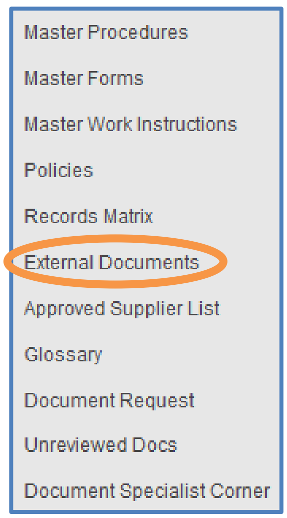
Record Title	Location	Retention Min	Process	Disposition	Access
Aged Receivables Report	Accounting Office	1 year	Accounting	Delete	Restricted
BL, Package List, Delivery Tickets	Operation Administrative Office	1 Year	Operations	Archive	Restricted
Calibration - Out-of-Spec Records (CIP)	Web QMS	3 Years	Operations	Delete	All
Calibration Certificate	Web QMS	3 years	Operations	Delete	All
Corrective/Preventative Actions (CIP)	Web QMS	3 years	Quality	Delete	All
Customer Delivery Tickets	Operation Administrative Office	1 Year	Operations	Trash	Restricted
Customer Inquires and Quotes	Operation Administrative Desk	1 Year	Sales	Archive	Restricted
Customer PO's, Job Packets and Work Orders	Operation Administrative Office	1 Year	Sales	Archive	Restricted

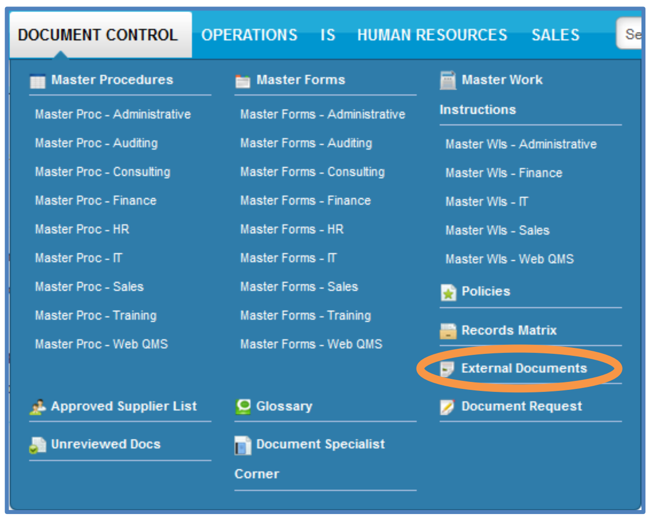
For information on how to edit this module go to the **Editing Modules** section of this manual.

For more information on how to create or edit the link to CIPs see the "Link to CIP" user guide.

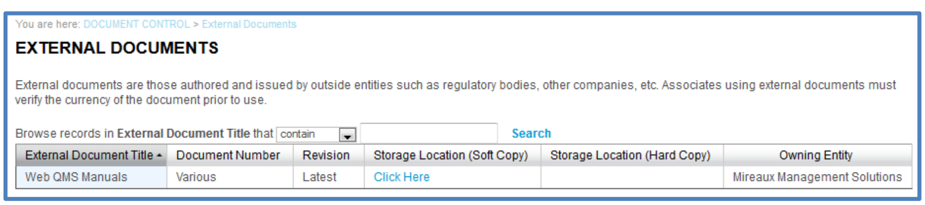
4.6.5 External Documents

CLICK **External Documents** from the Left Menu or the Top Menu of the Document Control Tab.





You will be directed to the **External Documents** page. All the external documents will be shown on the page, similar to this:



You are here: DOCUMENT CONTROL > External Documents

EXTERNAL DOCUMENTS

External documents are those authored and issued by outside entities such as regulatory bodies, other companies, etc. Associates using external documents must verify the currency of the document prior to use.

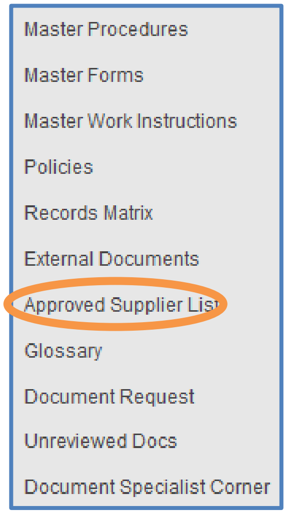
Browse records in External Document Title that contain Search

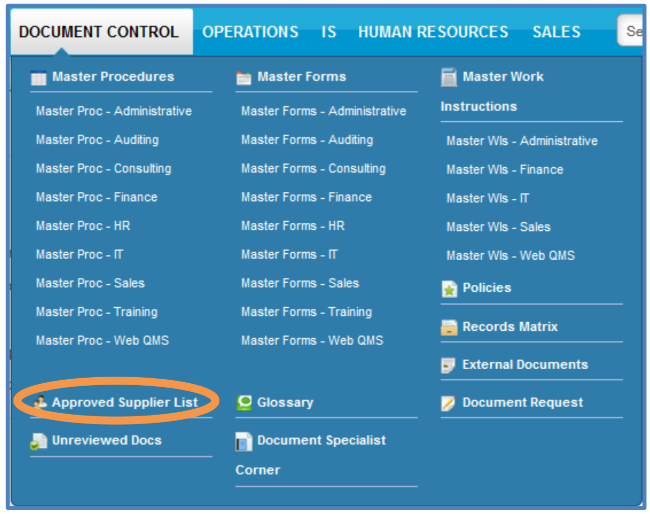
External Document Title	Document Number	Revision	Storage Location (Soft Copy)	Storage Location (Hard Copy)	Owning Entity
Web QMS Manuals	Various	Latest	Click Here		Mireaux Management Solutions

You can CLICK the blue link in **Storage Location (Soft Copy)** column to open the document in your computer.

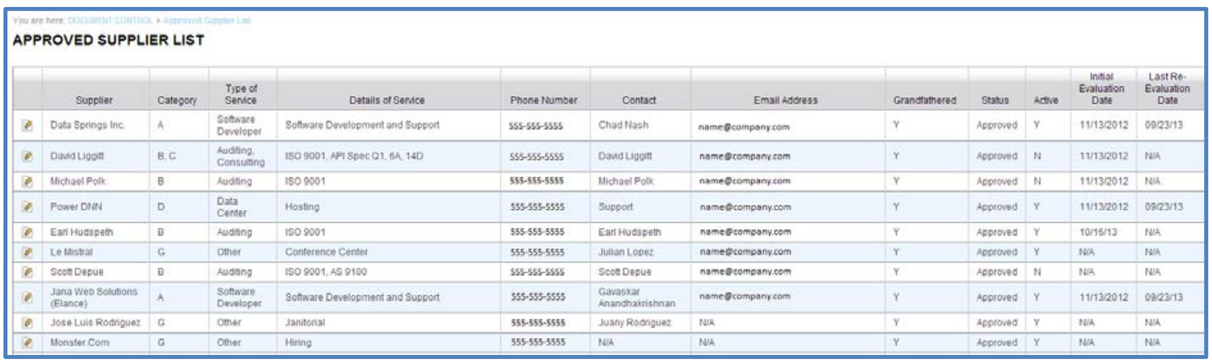
4.6.6 Approved Supplier List

CLICK **Approved Supplier** List from the Left Menu or the Top Menu of the Document Control Tab.





You will be directed to the **Approved Supplier List** page. You will see a table of the entire approved supplier list available for your review, similar to this:



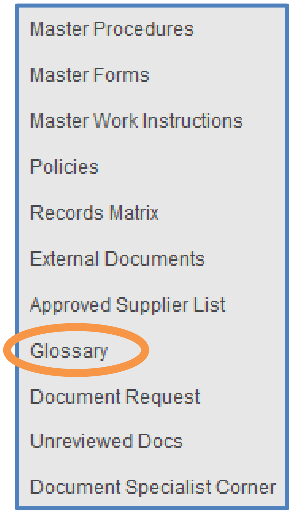
APPROVED SUPPLIER LIST

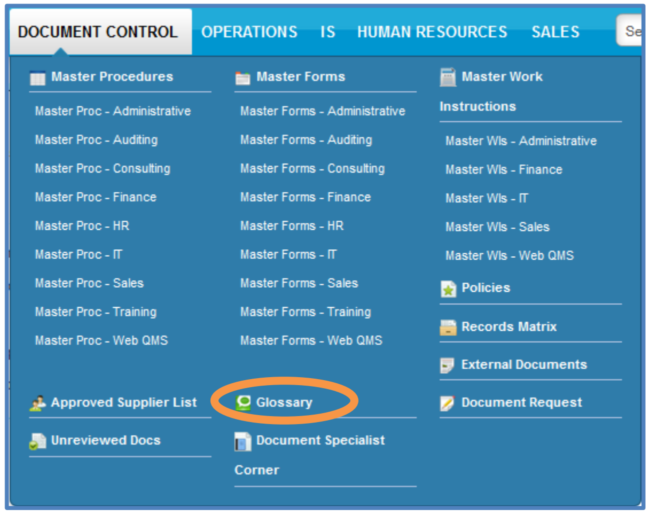
	Supplier	Category	Type of Service	Details of Service	Phone Number	Contact	Email Address	Grandfathered	Status	Active	Initial Evaluation Date	Last Re-Evaluation Date
	Data Springs Inc.	A	Software Developer	Software Development and Support	555-555-5555	Chad Nash	name@company.com	Y	Approved	Y	11/13/2012	09/23/13
	David Liggitt	B, C	Auditing, Consulting	ISO 9001, API Spec Q1, 6A, 14D	555-555-5555	David Liggitt	name@company.com	Y	Approved	N	11/13/2012	N/A
	Michael Polk	B	Auditing	ISO 9001	555-555-5555	Michael Polk	name@company.com	Y	Approved	N	11/13/2012	N/A
	Power DNN	D	Data Center	Hosting	555-555-5555	Support	name@company.com	Y	Approved	Y	11/13/2012	09/23/13
	Earl Hudspeth	B	Auditing	ISO 9001	555-555-5555	Earl Hudspeth	name@company.com	Y	Approved	Y	10/16/13	N/A
	Le Mistral	G	Other	Conference Center	555-555-5555	Julian Lopez	name@company.com	Y	Approved	Y	N/A	N/A
	Scott Depue	B	Auditing	ISO 9001, AS 9100	555-555-5555	Scott Depue	name@company.com	Y	Approved	N	N/A	N/A
	Jana Web Solutions (Elance)	A	Software Developer	Software Development and Support	555-555-5555	Gavaskar Anandhakrishnan	name@company.com	Y	Approved	Y	11/13/2012	09/23/13
	Jose Luis Rodriguez	G	Other	Janitorial	555-555-5555	Juany Rodriguez	N/A	Y	Approved	Y	N/A	N/A
	Monster.Com	G	Other	Hiring	555-555-5555	N/A	N/A	Y	Approved	Y	N/A	N/A

For each supplier, you can see the name, category, contact name, contact email, phone number, scope, grandfathered, status, active, evaluation criteria, documents, related evaluation dates, comments, and reviewer. Depending on your Web QMS customization, the columns on your Approved Supplier Name may vary.

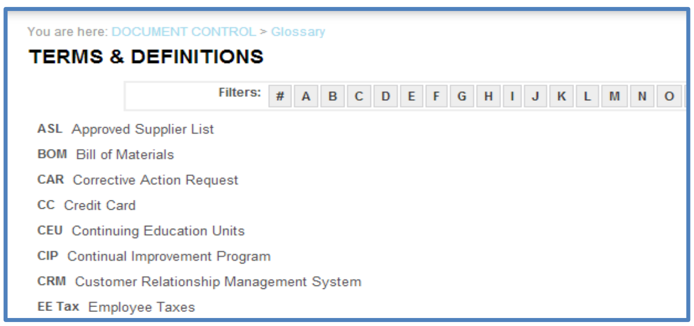
4.6.7 Glossary

CLICK **Glossary** from the Left Menu or the Top Menu of the Document Control Tab.



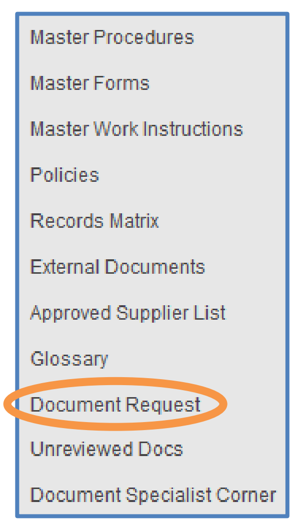


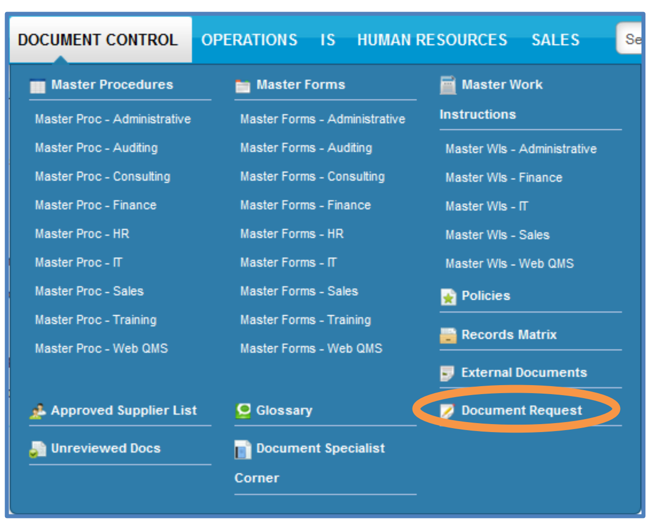
You will be directed to the **Glossary** page. On this page, you will see the Terms & Definitions, similar to this:



4.6.8 Document Request (For Master Documents Application Only)

The **Document Request** is available to all employees to facilitate submitting a new document for incorporation into Web QMS documentation. CLICK **Document Request** from the Left Menu or the Top Menu of the Document Control Tab.



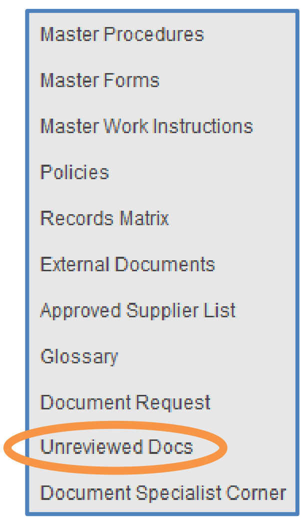


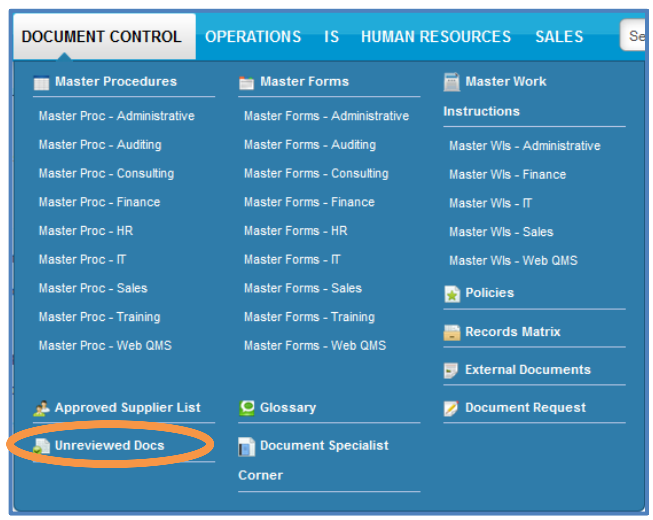
In the following page, you will be asked to ENTER the information of the new document you wish to request.

To learn more information about how to request a new document within the **Master Documents Application**, refer to the **Master Documents Application Manual**.

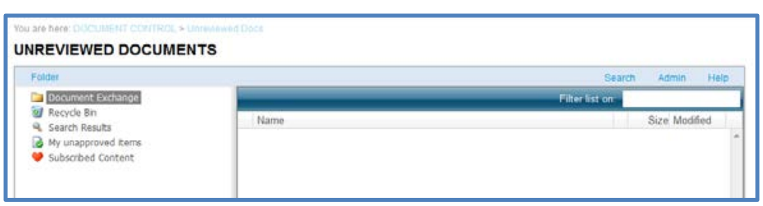
4.6.9 Unreviewed Docs (For Master Documents Application Only)

The **Unreviewed Documents** area helps employees review and approve documents that have been assigned to them for electronic approval. CLICK **Unreviewed Docs** from the Left Menu or the Top Menu of the Document Control Tab.

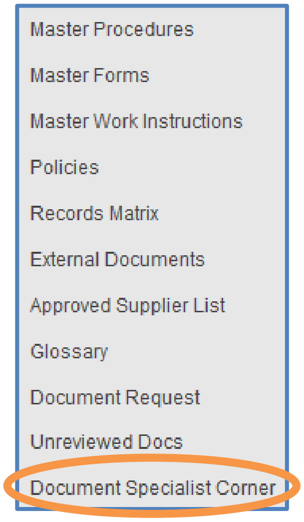


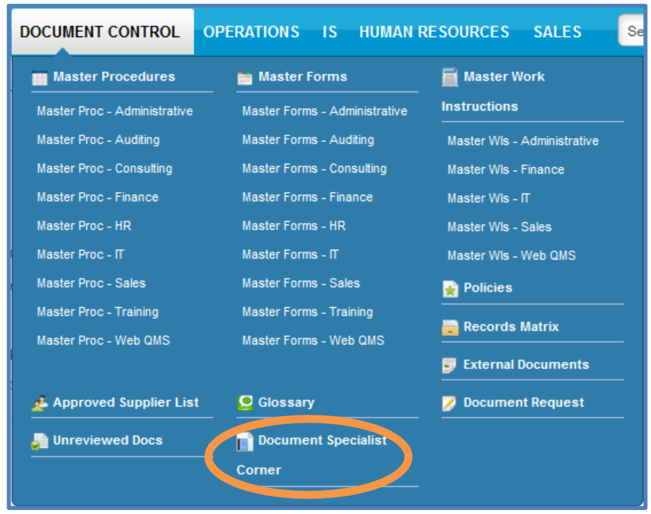


CLICK **Non-approved Items** to see all the documents that you need to view, edit or approve. To learn more information about how review and approve documents on Web QMS, refer to the **Master Documents Application Manual**.



NOTE: You can see there is another item listed on the Left Menu and the Top Menu of the Document Control Tab —**Document Specialist Corner**.





This is the area where the Document Specialist manages the documents inside the application. Only users with this role may be able to access this area.

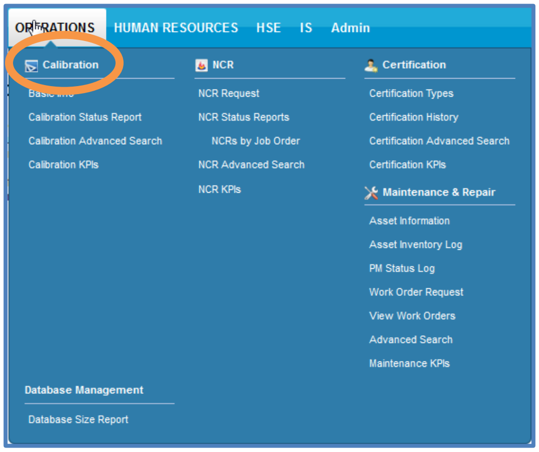
To learn more information about the Master Documentation Application, refer to the **Master Documents Application Manual**.

4.7 OPERATIONS TAB

CLICK the **Operations** Tab to access the Operation Pages.

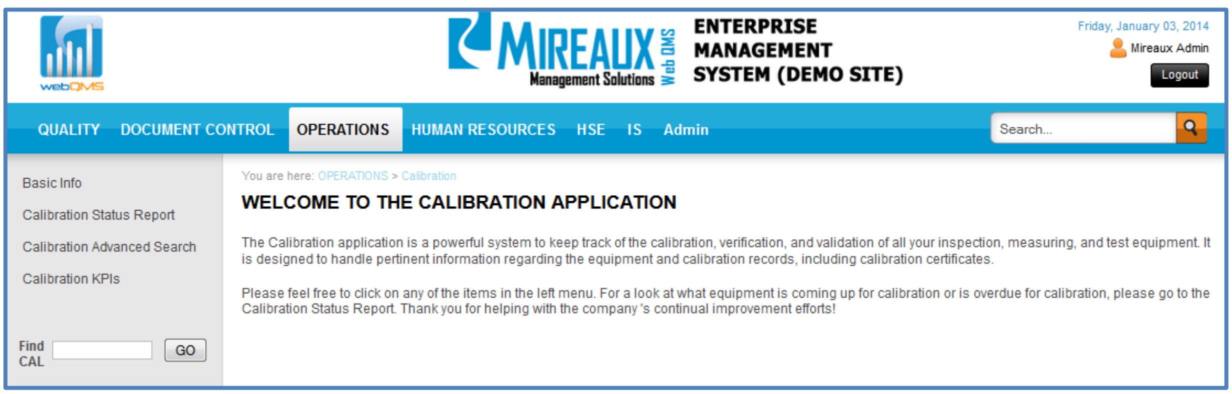
The **Operations** page typically looks similar to this:

The **Operations** page may contain four applications, depending on your Web QMS version and specific configuration: **Calibration**, **NCR, Employee Certification,** and **Maintenance**. You can access the applications by CLICKING them from the Left Menu or from the Top Menu of the Operations Tab.



4.7.1 Calibration Application

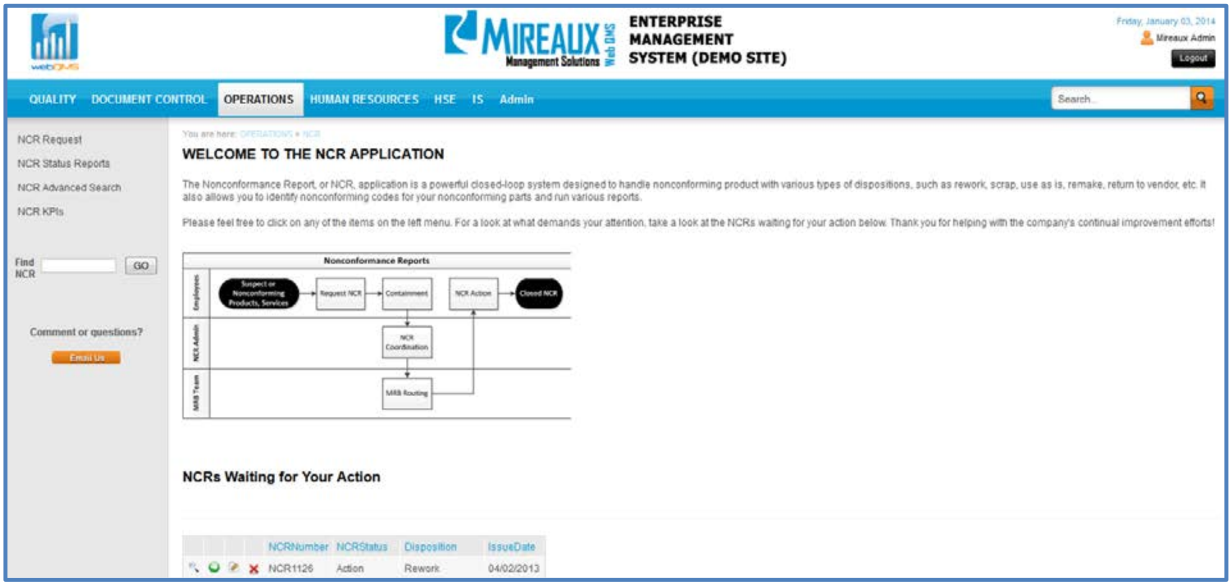
The Calibration Application is a powerful, user-friendly system designed to keep track of the calibration, verification, and validation of all your inspection, measuring, and test equipment. The application is designed to handle pertinent information regarding the equipment, such as calibration records and certificates.



To learn more information about the Calibration Application, refer to the **Calibration Application Manual.**

4.7.2 NCR Application

The Nonconformance Report (NCR) Application is a powerful closed-loop system designed to handle nonconforming product with various types of disposition, such as rework, scrap, use as is, remake, return to vendor, etc. It also allows you to identify nonconforming codes for your nonconforming parts.



To learn more information about the NCR Application, refer to the **NCR Application Manual.**

4.7.3 Employee Certification Application

The Employee Certification Application is designed to act as a repository of documentation associated with various employee certifications, as well as to provide a series of reports regarding certification status.

To learn more information about the Employee Certification Application, refer to the **Employee Certification Application Manual.**

4.7.4 Maintenance Application

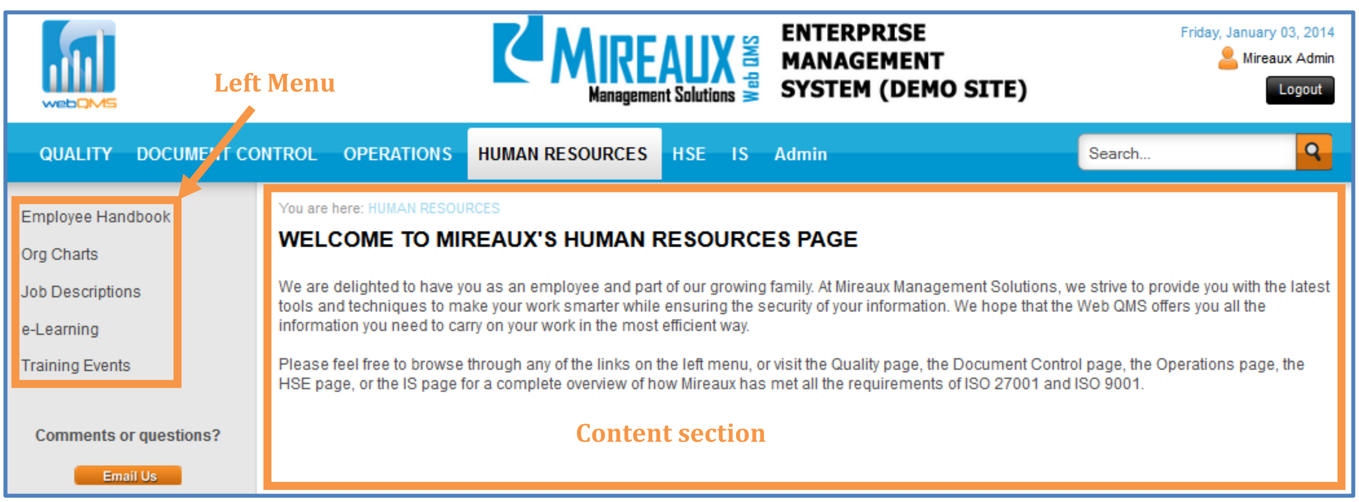
The Maintenance Application is designed to keep an inventory of usage, preventive maintenance, and repair of company assets or equipment and to serve as a place to issue Work Orders for maintenance repairs. It is highly flexible and customizable to suit your company's needs.

To learn more information about the Maintenance Application, refer to the **Maintenance Application Manual.**

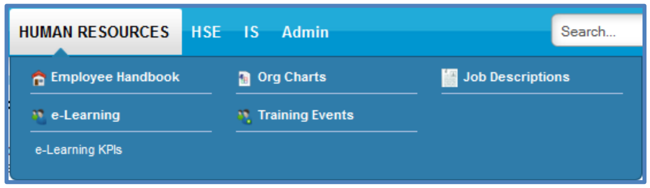
4.8 HUMAN RESOURCES TAB

CLICK the **Human** Resources Tab to access the Human Resources pages.

The **Human Resources** page typically looks similar to this:

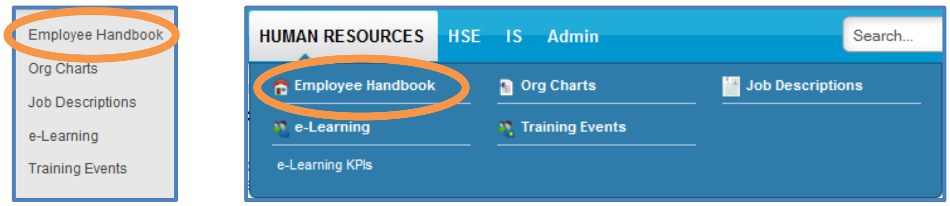


The Human Resources options vary depending on your version of Web QMS and specific configuration. Typical applications are **E-Learning** and **Training Events**. You can access the subpages and applications by CLICKING them from the Left Menu, or from the Top Menu from the Human Resources Tab.

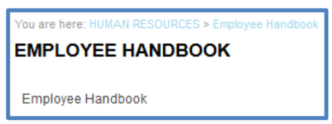


4.8.1 Employee Handbook

CLICK **Employee Handbook** from the Left Menu or the Top Menu of the Human Resources Tab.

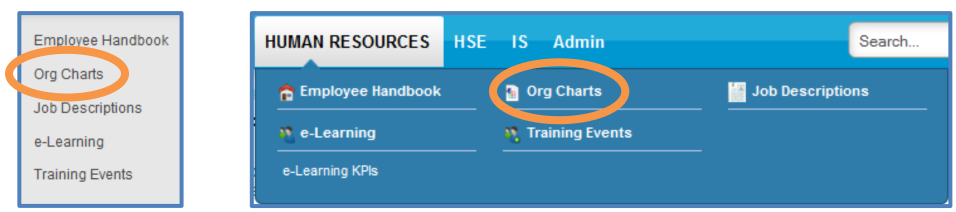


In some cases this will take you to a page with a link. In other cases it will take you directly to the document.



4.8.2 Org Charts

CLICK **Org Charts** from the Left Menu or the Top Menu of the Human Resources Tab.



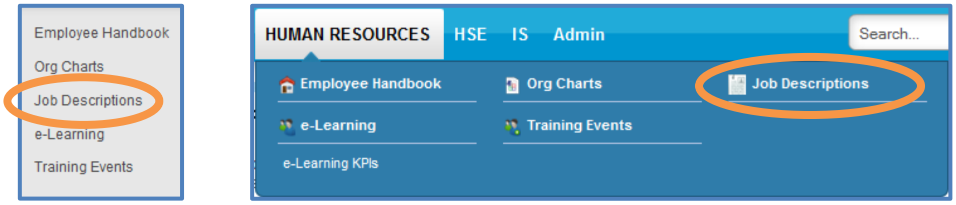
You will see a list of the Organizational Charts. CLICK any link to open an Organizational Chart.

For information on how to edit this module go to the **Editing Modules** section of this manual.

For more information on how to create or edit the link to CIPs see the “Link to CIP” user guide.

4.8.3 Job Descriptions

CLICK **Job Descriptions** from the Left Menu or the Top Menu of the Human Resources Tab.



You will see a list of Job Descriptions. CLICK any link to open a Job Description.


You are here: HUMAN RESOURCES > Job Descriptions

JOB DESCRIPTIONS

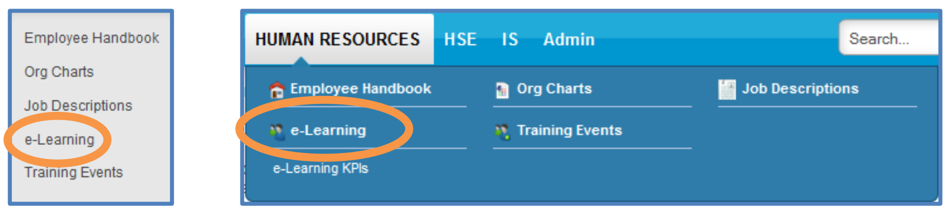
Job Title	Job Description	Department
Administrative Assistant	Click here	Administration
Director of Finance	Click here	Finance
Director of Sales	Click here	Sales
E-Learning Specialist	Click here	Training
President	Click here	
Technical Administrator	Click here	IT
Vice President of Operations	Click here	Operations

For information on how to edit this module go to the **Editing Modules** section of this manual.

For more information on how to create or edit the link to CIPs see the “Link to CIP” user guide.

4.8.4 E-Learning Application

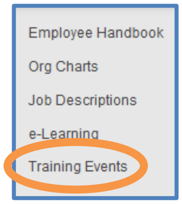
CLICK **E-Learning** from the Left Menu or the Top Menu of the Human Resources Tab.

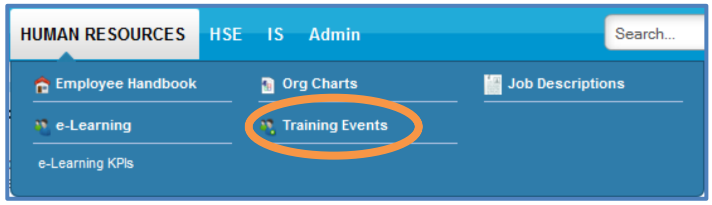


To learn more information about the E-Learning Application, refer to the **E-Learning Application Manual**.

4.8.5 Training Events Application

CLICK **Training Events** from the Left Menu or the drop down menu of the Human Resources Tab.





To learn more information about the Training Events Application, refer to the **Training Events Application Manual**.

4.9 EDITING MODULES (ADMIN ONLY)

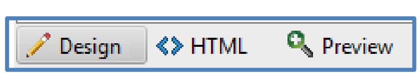
Modules are any object within Web QMS whose contents can be edited. Web QMS provides over 50 different modules, but here we will only cover how to edit some of the most frequently used modules: HTML Modules, Link Modules, Table Modules, Glossary Modules, and FAQ Modules.

Though any user can view and use modules, only Administrators are able to edit them. Before you can edit a module, you must ensure that you are in Edit Mode on Web QMS. To activate Edit Mode, make sure that **Edit** is toggled in the **Top Edit Panel**. When **Edit** is selected, a **Manage** button appears behind the title of a module, as shown in the figure below. The editing menu that results from CLICKING on the **Manage** button differs depending on the sort of module being edited.

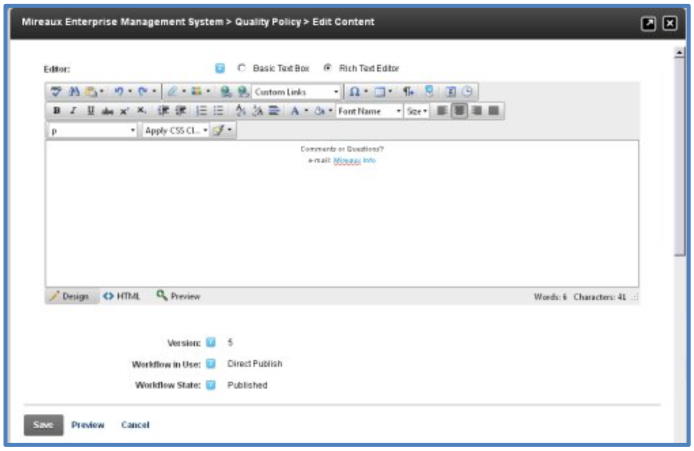
4.9.1 Editing HTML Modules

An HTML Module allows you to input text. CLICKING the Manage button to edit an HTML Module brings up the new window containing a text box shown in the figure above. You can recognize HTML Modules because when you put your cursor on the pencil icon, one of the options you see is, "**Edit Content**."

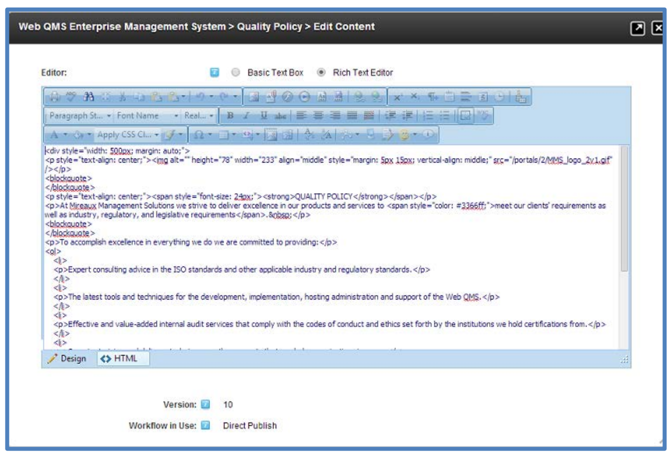
Here, you have the option to edit text using one of two modes: Design Mode or HTML Mode. Buttons for these modes (see figure below) appear immediately below the text box.



Design Mode allows users to ENTER text in the same way that they would if they were in Microsoft Word. Directly above the text box, there appears a formatting toolbar containing options for formatting text, adding links or images, spell-checking, etc.

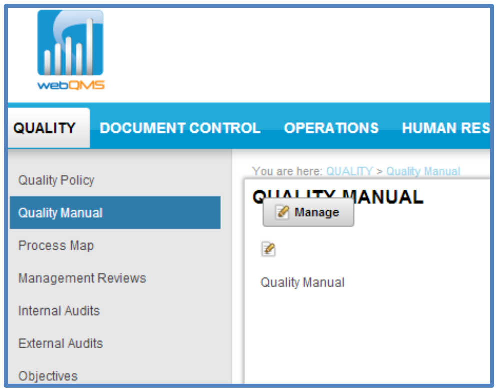


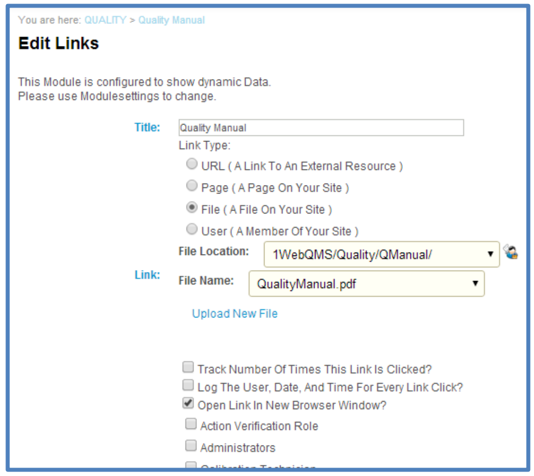
In HTML Mode, the user can input HTML code along with text.



4.9.2 Editing Links Modules

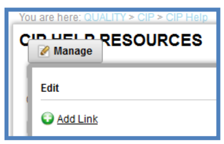
Links Modules contain a collection of links to various kinds of objects on Web QMS. Links Modules can link to other pages on Web QMS, external web pages, or files on Web QMS.



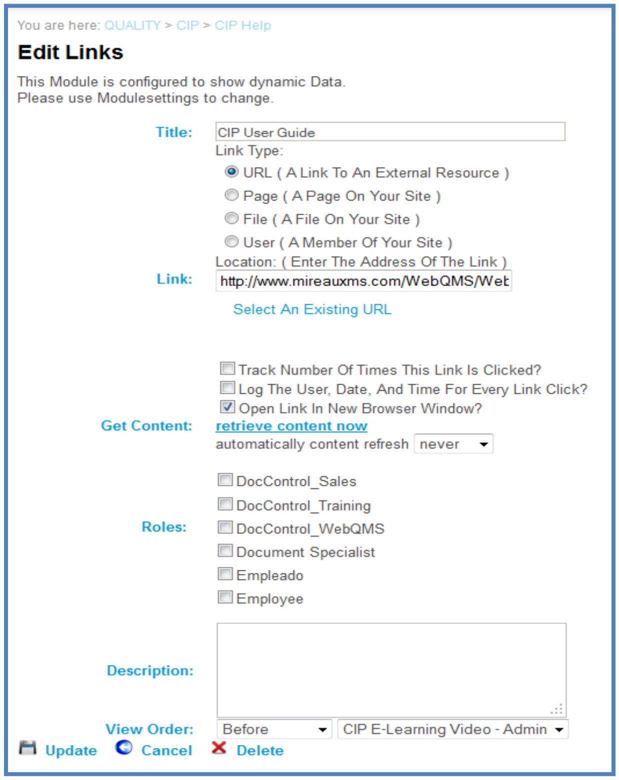


For example, the Links Module pictured in the figure above contains a link to another page on Web QMS. Links can be displayed either as drop down menus, or as plain text lists as in the figure above. Administrators can either edit existing links in a Links Module or add a new link.

4.9.2.1 Adding a Link



To add a new link to a Links Module, move the cursor over the Manage icon, and then CLICK **Add Link** in the resulting pop-up box. This will lead to a new page containing text fields where you can define the parameters of the link (see figure below). The Title is the text that will be displayed as the link. Below the Title is a field to select the Link Type: URL, Page, File, or User.



When inputting a **URL link** (links to external websites), simply paste the desired URL into the Link textbox. Selecting Page, File, or User (links to QMS pages), will yield additional fields or drop down menus from which an appropriate item can be chosen.

The **Get Content** field contains radio buttons that allow users to track how often a link is clicked and by whom, as well as the option to have links open in a new browser window. Next, the **Roles** field allows you to control who may access this link.

In the **Description** field you are able to provide an explanation of the link, or any notes you feel are relevant to describe the link.

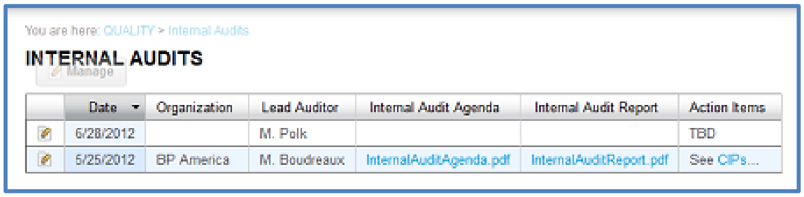
Finally, the **View Order** shows drop down menus where you can select where in the list of links this new link will fall. CHOOSE a pre-existing link from the right drop down menu, then CHOOSE either Before or After to determine where the new link will be placed. CLICK **Update** to add the link to the list.

4.9.2.2 Edit a Link

To edit a link that already exists, CLICK the **Manage** button that appears to the left of the link. This will direct you to **Edit Links** page (similar to when you added a new one). The only difference is the existence of a **Red X Delete icon** next to the **Update** link. CLICKING here will delete the link from the Links Module. Edit the information for the link as needed and then CLICK **Update** to save the information.

4.9.3 Editing Table Modules

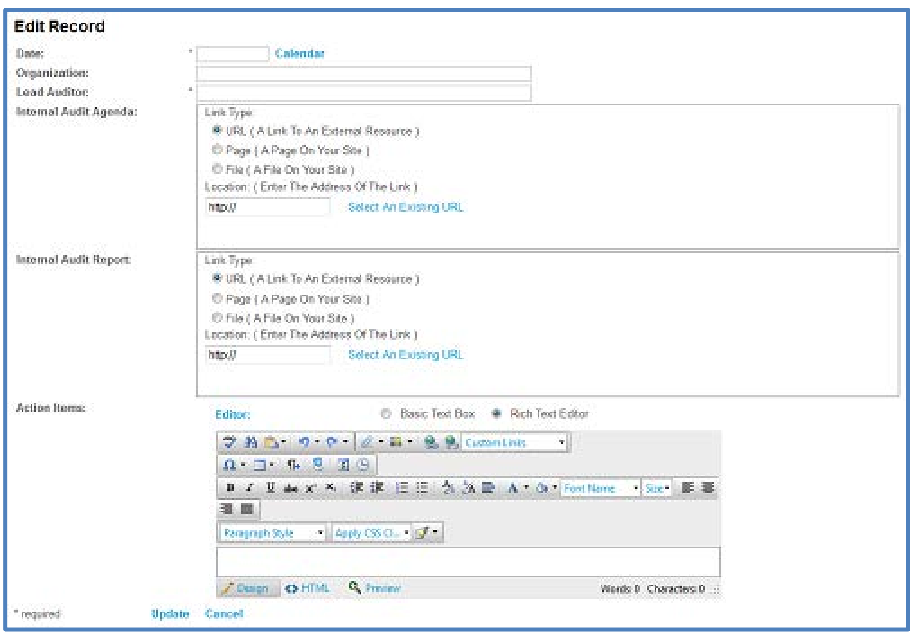
Table Modules allow the creation of a table in order to display a list of records with specific fields. Each field can be configured with various additional options like drop down selection, input validation, input help text, or formatting. Most tables feature sorting, paging, filter, and search features. An example of a Table Module is shown in figure below.



	Date	Organization	Lead Auditor	Internal Audit Agenda	Internal Audit Report	Action Items
	6/28/2012		M. Polk			TBD
	5/25/2012	BP America	M. Boudreaux	InternalAuditAgenda.pdf	InternalAuditReport.pdf	See CIPs...

4.9.3.1 Adding a New Record to an Existing Table

To add a new record to an existing Table Module, CLICK the **Manage Yellow Pencil icon** to open. This will open a new pop-up box. Within this box, CLICK the **Add New Record** button. The following screen appears:



The particular fields in the resulting form vary based on the Table itself. For instance, in the example depicted in the figure above, there are fields to add the date, the name of the lead auditor, and links to internal audit agendas, reports, and Action Items. Input the pertinent information for your table as necessary, then SCROLL down and CLICK the **Update** button.

4.9.3.2 Editing Existing Records

To edit an existing record, CLICK the **Manage Yellow Pencil icon** that appears to the left of the record that you wish to edit. CLICKING this icon will lead to the same form used to add a new record to an existing Table Module (see previous section figure). Simply modify the record as needed and CLICK Update.

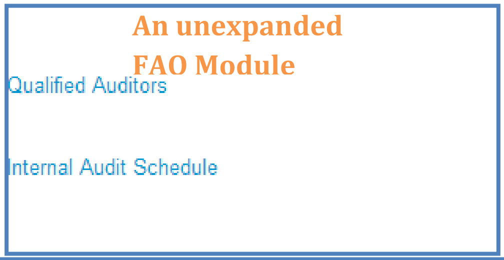
4.9.3.3 Editing Table Module Properties

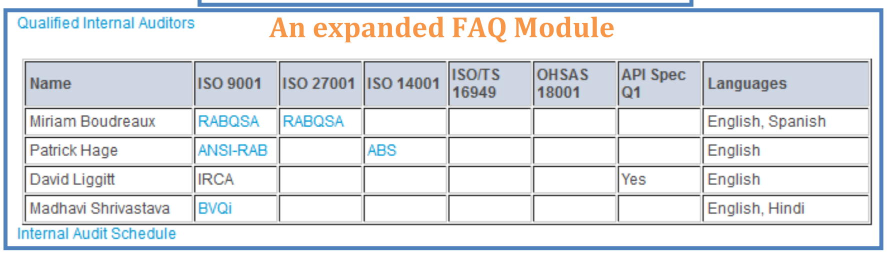
In order to edit the Table Module's properties, CLICK the **Manage Yellow Pencil icon**, and then SELECT **Form and List Configuration**. A screen similar to the one below will appear, showing all the table columns. Depending on your configuration, this number of fields may vary.

The **Manage Yellow Pencil icon** next to the column title indicates that an individual item can be edited. The **Red X Delete icon** under the same column indicates that an individual item can be deleted. Here, items can be made searchable, new columns can be added to the table, and the appearance of the table can be altered. Advanced editing functions for Column Settings, Page Related Settings, and List Settings are available as collapsible menus

4.9.4 FAQ Modules

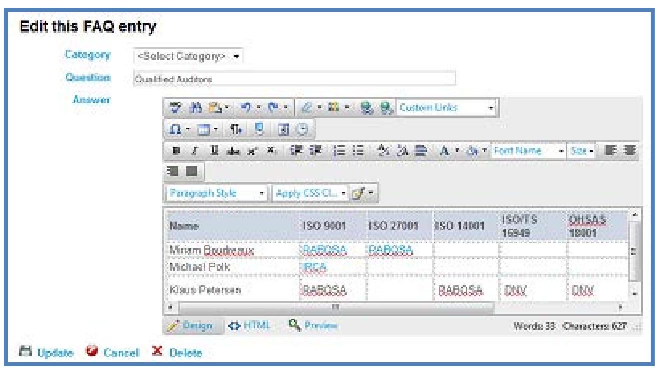
FAQ Modules are used to create a list of questions and answers, or any other information that needs to be expanded and collapsed. FAQ Questions are the links displayed by default in an FAQ Module. For example, in the figure below, the Questions are Internal Audit Schedule and Qualified Auditors. The latter has been expanded to show the entry's answer.





Name	ISO 9001	ISO 27001	ISO 14001	ISO/TS 16949	OHSAS 18001	API Spec Q1	Languages
Miriam Boudreaux	RABQSA	RABQSA					English, Spanish
Patrick Hage	ANSI-RAB		ABS				English
David Liggitt	IRCA					Yes	English
Madhavi Shrivastava	BVQi						English, Hindi

4.9.4.1 Editing an Existing FAQ Entry



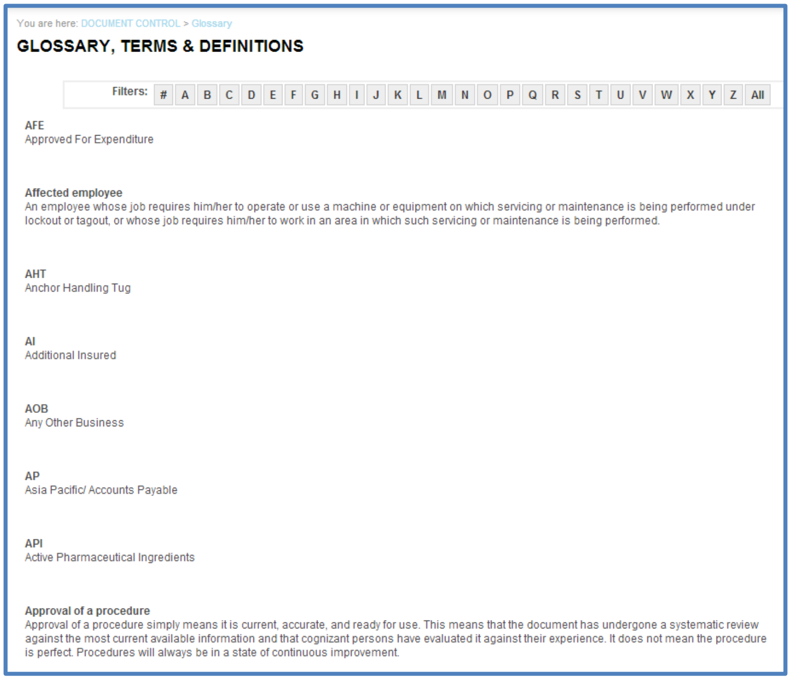
Next to each entry in an FAQ Module appears a **Manage Yellow Pencil icon**. CLICKING on this icon leads to the **FAQ Entry Edit** page. The **FAQ Entry Edit** page contains fields for editing the question and answer displayed within the FAQ Entry. Once all the information has been edited as needed, CLICK the **Update** button to save your work.

4.9.4.2 Adding a New FAQ

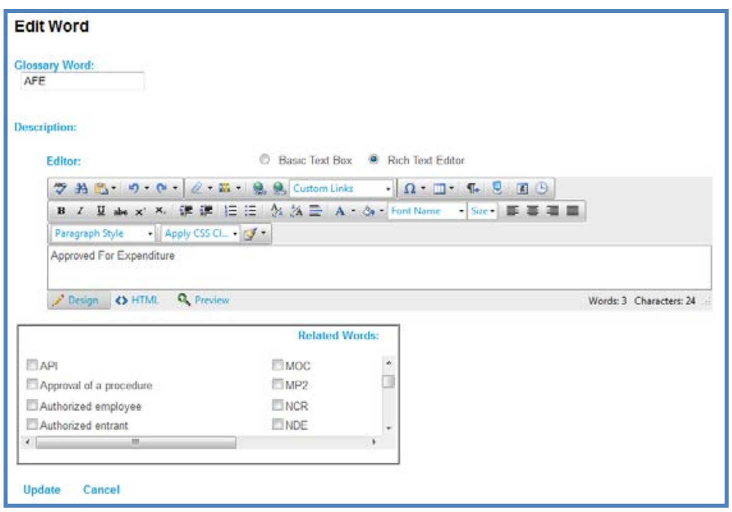
Put the cursor on the pencil icon next to the module title. CLICK **Add New FAQ** from the pop-up menu. The same **FAQ Entry Edit** page shown in the previous section figure will appear. Simply FILL OUT the **Form** in the same manner as when editing an old entry and then CLICK **Update** when finished editing.

4.9.5 GLOSSARY MODULE

The Glossary Module is a simple searchable module that displays multiple terms and their definitions. Letters at the top help to filter down by letter. In the Glossary Module, a term is called a glossary word.



4.9.5.1 Editing an Existing Glossary Word



To edit an existing glossary word, CLICK the **Manage Yellow Pencil icon** to the left of it. Doing so will open the Edit Word window, which contains fields for the word and its definition. Additionally, below the definition text box, there is the option to link an entry to related terms. Simply CLICK the box next to related terms to create a reference to these terms in the glossary.

4.9.5.2 Deleting a Glossary Word

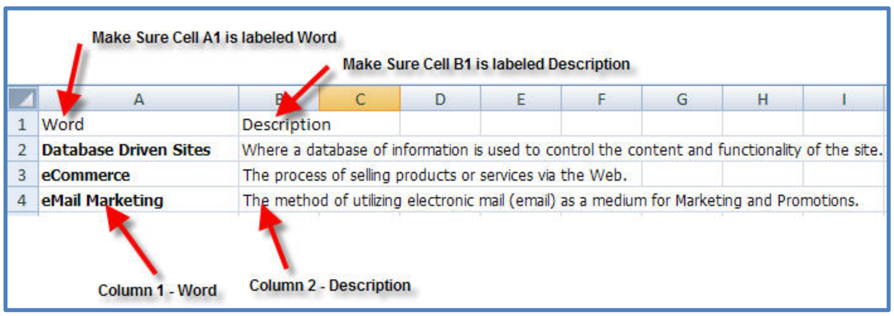
To delete a Glossary Word, CLICK the **Red X Delete icon** displayed next to the **Manage Yellow Pencil icon**.

4.9.5.3 Adding a New Glossary Item

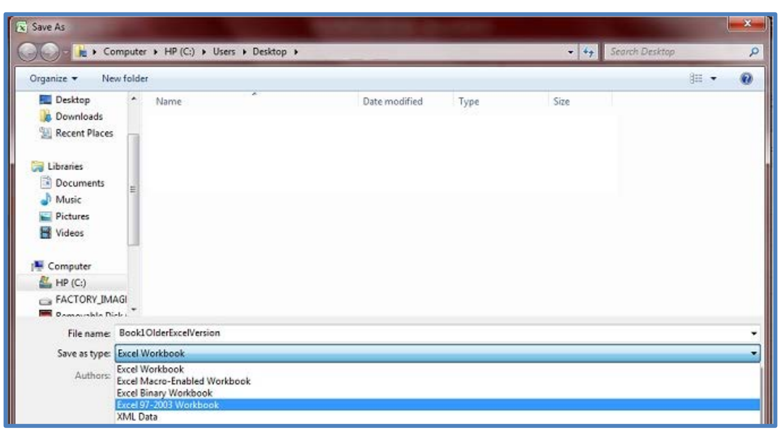
To add a single new glossary word, CLICK the **Manage Yellow Pencil icon** near the glossary title and SELECT **Add Item**. Simply ENTER the new word in the same manner and then CLICK **Update** to add the word to the glossary.

4.9.5.4 Bulk Insert of Items into the Glossary

If many new words need to be added at once, the most efficient way to do so is through the **Bulk Insert** function, which can import a list of words from an Excel spreadsheet. First, ensure that the spreadsheet of glossary words is formatted properly. Cell A1 should contain text reading Word and cell B1 text reading Description. The glossary words to be added should be listed in column A. The description of the word should be located in Column B. In the end, the spreadsheet should look like the one depicted in the figure below.

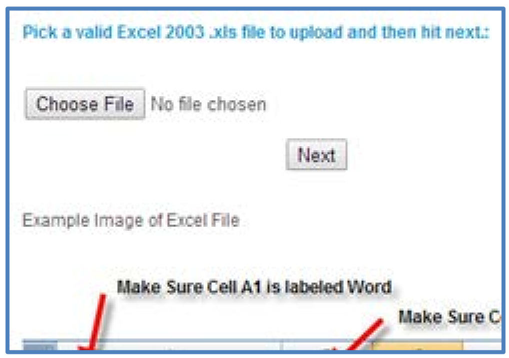


NOTE: This spreadsheet must be saved as a 2003 Excel spreadsheet. Later versions of the Excel spreadsheets have **.xlsx** as the file extension, while Excel 2003 spreadsheets have an **.xls** file extension. If using Excel 2007 or later, format the spreadsheet as described above, then CLICK the Office icon and choose Save As. When at the Save As dialogue box, CLICK the drop down menu titled **Save as**, then ENTER, CHOOSE **Excel 97 – 2003 Workbook**, and save.

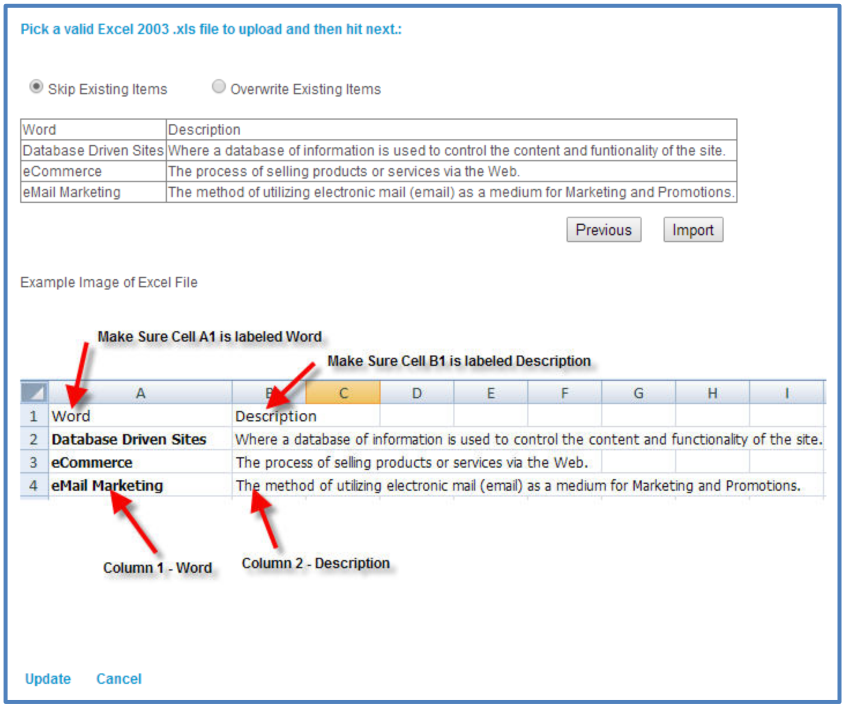


Once the spreadsheet of glossary words is properly formatted and saved, go back to Web QMS, CLICK the **Manage Yellow Pencil icon** next to the title of the Glossary Module, and SELECT **Bulk Insert**.

Then, CLICK the **Choose File** button and SELECT the spreadsheet from your local network. SELECT the proper file, then CLICK next.



The words from the spreadsheet will be displayed for review. There will also be buttons to SELECT whether to Skip Existing Items or Overwrite Existing Items if any of the words in the spreadsheet are already present in the Glossary Module. After choosing one of these options and ensuring that all words and definitions are correct, CLICK the **Update** button to add the words to the Glossary Module.



4.10 ADMIN FUNCTIONS (ADMIN ONLY)

Users holding the Administrator role can access the **Admin Tab** in the Top Menu.

The Admin Tab allows access to various administrative functions. We will explain the following five:

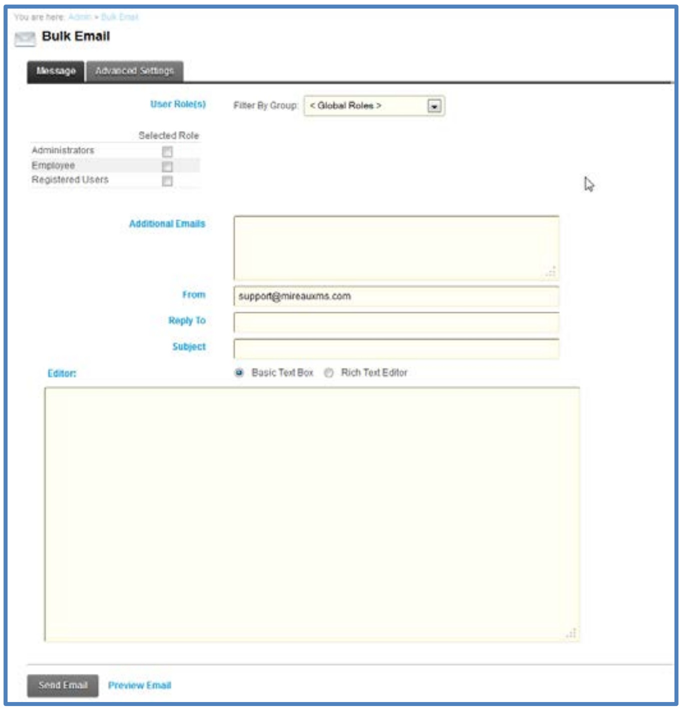
- **User Accounts**
- **Bulk Email**
- **File Manager**
- **Recycle Bin**
- **Organizational Variables**

4.11.1 User Accounts

Here, Administrators can manage user accounts, performing such functions as authorizing a user, managing roles for a user, managing passwords, and managing profiles. For further details on these functions, refer to the User Access Functions sections of this manual.

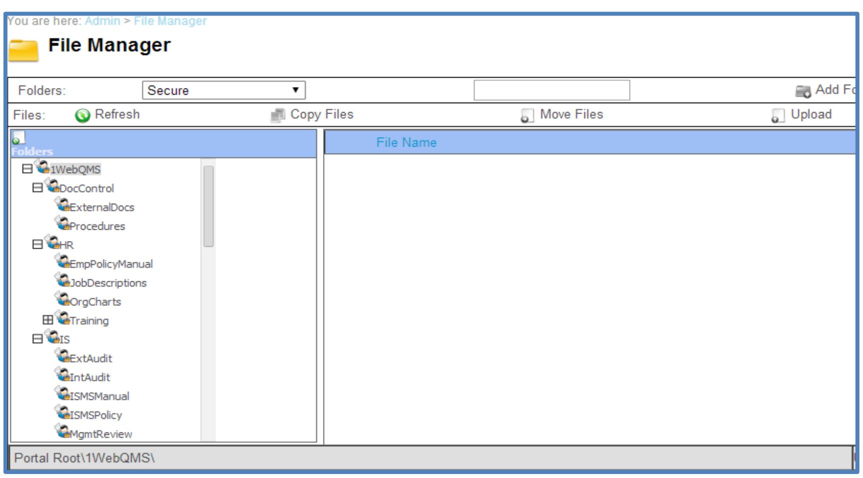
4.11.2 Bulk Email

This function allows Administrators to send emails to other users of Web QMS. CLICKING the link to this page yields a form for bulk emails that includes fields for the author's email address, an address to which replies should be sent, the subject message, and a text box in which to write the message itself. When you have entered the email message and filled out the other necessary fields, CLICK the button reading **Send Email**.



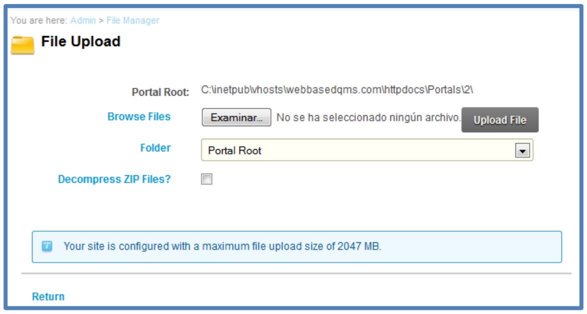
4.11.3 File Manager

The File Manager is a powerful function that allows Administrators to manage files in the server. In the File Manager, files can be uploaded, copied, moved, or deleted and their permissions managed.

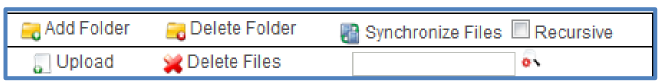


NOTE: This folder follows the same structure as Web QMS.

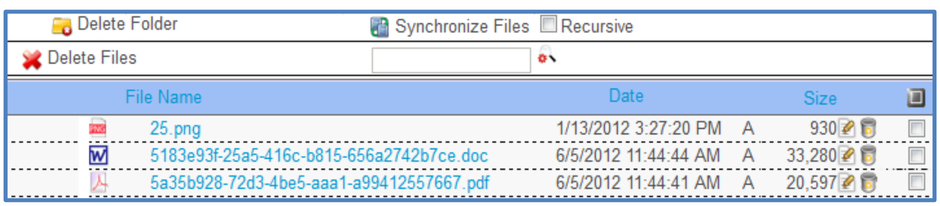
a. **Uploading a file:** CLICK the **Upload** button in the File Manager display and SELECT the **File** from your local computer. Use the drop down menu labeled **Folder** to determine where the file will be saved on Web QMS. It is important to select the correct folder, so that you can keep all files organized. Then CLICK **Upload File** to proceed.



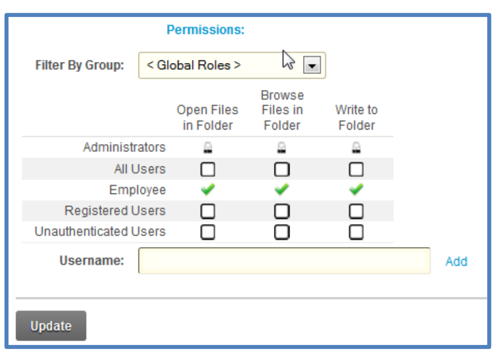
b. If files are uploaded through FTP, CLICK the **Synchronize Files** button to keep the information up-to-date. The Synchronize Files button helps to ensure that Web QMS recognizes all files that have been uploaded on the server through the FTP client.



c. **Deleting a file:** To delete one file, CLICK the **Trash Can icon** next to it. To delete multiple files at once, CLICK the **checkbox** next to the unwanted files, and then CLICK the **Delete Files icon** at the top of the File Manager Display.

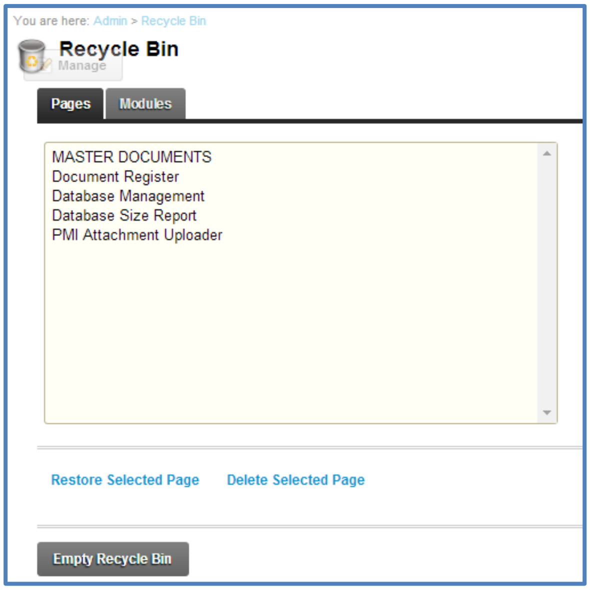


d. **Permissions:** Administrators can edit the Permissions or security settings of files or folders to determine who can view or edit items. The Permissions menu is located directly below the File Manager Display. To edit Permissions, simply SELECT an **Item** or folder, and then check the appropriate boxes. Permissions are usually set according to roles on Web QMS. For example, if anyone in an Employee role should be able to view a file, then check the box for **Open Files** next to the label Employee.



4.11.4 Recycle Bin

Administrators can view the **Recycle Bin** and restore a module or page that was intentionally or mistakenly deleted, as long as the **Recycle Bin** has not been cleared.



To restore or delete a page or module, Web QMS has to be in **Edit** mode. Select the **Pages Tab** or **Modules Tab** and choose the appropriate page or module and CLICK **Restore Selected Page/Module** or **Delete Selected Page/Module**. You also have the option to **Empty Recycle Bin**.

4.11.5 Organization Variables

In this area, Administrators can manage parameters used in the Calibration, CIP, Employee Certification, Maintenance, and NCR Applications. For details, refer to the Administration sections in the respective Calibration, CIP, Employee Certification, Maintenance, or NCR Application Manuals.

5.0 REVISION LOG

DATE	SECTION	DESCRIPTION OF CHANGE	APPROVED BY
03/02/2011	All	Original Release of MMS-WQM-201 Web QMS Maintenance Guide, MMS-WQM-202 Creating a Login and Resetting a Password and MMS-WQM-203 Authorize Unauthorize Web QMS Users	M. Boudreaux
6/23/2011	6.3	Added a new section on MMS-WQM-203 to show how to remove users from calibration locations prior to unauthorizing them from the system	M. Boudreaux
01/26/2012	All	Update the screenshots and explanation on MMS-WQM-201	M. Boudreaux
1/10/2012	All	Original Issue of MMS-WQM-221	M. Boudreaux
01/11/2012	All	Formatting, added pictures to 4.2c.on MMS-WQM-202 and formatting, editing pictures, changed style of the titles and subtitles on MMS-WQM-203.	M. Boudreaux
06/14/2012	All	Copyediting performed throughout MMS-WQM-202 and MMS-WQM-203	M. Boudreaux
06/15/2012	All	Revision of MMS-WQM-201 for version 2.0 of Web QMS.	M. Boudreaux
1/10/2012	All	Original Issue MMS-WQM-221 Web QMS User Guide	M. Boudreaux

DATE	SECTION	DESCRIPTION OF CHANGE	APPROVED BY
01/31/2014	All	Revision and integration of MMS-WQM-201, MMS-WQM-202, MMS-WQM-202 and MMS-WQM-221. Released as MMS-WQM-201 Web QMS Manual.	M. Boudreaux
6/1/2014	All	Revision, editing, and formatting performed throughout the Web QMS Manual.	M. Boudreaux

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