QAD Adaptive Applications

User Guide

QAD EQMS Applications: User Interface

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User Interface User Guide Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference	Changed By
APR 2021/v2021	Initial upload	--	RQT
SEPT 2022/v2022.1	Updated versioning; Removed references to Internet Explorer; Modified Gadget Types	p. 51	RQT
MAR 2023/v2023	Updated versioning; Added section: Bulk Operations; Added information regarding record navigator; Added information regarding admin filters	p. 27	RQT
MAR 2024/v2024	Updated versioning	--	RQT
SEPT 2024/v2024.1	Updated versioning	--	RQT
MAR 2025/v2025	Updated versioning; Updated Inbox; Updated Detail Screen Toolbar	p. 17, p. 31	RQT

Chapter 1

Introduction

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Overview

QAD EQMS is an enterprise-wide quality management software suite, which not only enables organizations to comply with standards, but can allow them to decrease costs of quality resulting in improvements to margins. This system allows you to determine how to automate business processes, comply with quality and regulatory standards, and leverage the same data needed in multiple processes. It is suited for a wide variety of industries, including:

- Automotive
- Life Sciences
- Industrial
- High Tech
- Consumer Products
- Food and Beverage

The EQMS software has a responsive design; not only does the content adjust to the size of your browser screen, it adapts to whatever device you use to access the software. This means you can access EQMS with a computer, a phone, an iPad, or any other device that grants access to a supported browser. And because EQMS can be viewed from many of today's popular browsers – including Microsoft Edge, Firefox, Google Chrome, and Safari – there are several options at your disposal.

Many general browser features are supported in EQMS, such as navigation, zoom, spell checking, and bookmarks. This allows EQMS to be fairly intuitive. Much of the system can also be understood as long as you become familiar with two specific screens: the Search screen and the Detail screen. The basic concepts of these screens are utilized throughout the software, which makes using any process much easier. See Chapters 5 and 7 for more details about these screens.

About This Guide

This user guide focuses on:

- Layout of the EQMS system and detail screens
- Instructions for various tasks
- Setup for automatic assignments and notifications

EQMS Modules

The EQMS suite is made up of several modules. The modules available depend on those purchased and the security for the user. Below is a brief overview of each module.

APQP

New product introduction and change management system with task and gate management. Also includes management of risk documentation (FMEA) and connections to other manufacturing documents like process flows and control plans.

Audit Management

Allows scheduling, tracking, and follow-up of any type of audits, including regulatory and process audits. Escalation Management to all other EQMS modules (CAPA, Supplier Quality, Training Management, Risk Management, APQP, etc.).

Continuous Improvement

Allows users to easily create and manage projects from predefined templates. Work can be assigned and tracked for completion, including the creation of issues with predefined selectable work flows to coordinate the completion of different types of tasks. Users can create meetings with predefined agendas and link to projects or issues for full task management and documentation of work.

Complaint Management

Allows organizations to capture complaints from customers and manage them through completion. Triage and take action on the complaint and seamlessly escalate to NCR/CAPA or Supplier Corrective Action as required.

Document Control

Centralized repository for all documents and records with an approval and archive system. Integrates with Training Tracking for closed loop training on document changes. Maintains a complete audit history of every data element relating to document records.

Gauge Management

Allows you to manage a schedule for internal or vendor calibrations and the results of those calibrations. R&R, bias, and linearity studies are also included.

Inspection & SPC

Integrated inspection system driven directly from Control Plans with trending and capability analysis. Inspection deviations escalate issues to NCR, SCAR, and CAPA activities.

NCR & CAPA

Non-conformance system that allows you to track and action any kind of defect, whether it be customer, supplier, or internal through an 8D process.

Risk Management

An ISO 31000 compliant system to help actively manage risks in a living document. These can be risk assessments from any part of the business and is integrated directly into change management, new product introduction, and supplier quality processes.

Supplier Quality

Allows you to use data to use quality and delivery metrics to score suppliers to drive your approved supplier list. The suppliers will be able to log in and respond to corrective actions, view audit results, update certifications, and view documentation shared with them.

Training Management

Integrated training compliance system allows automated management of your training requirements with succession development planning.

Chapter 2

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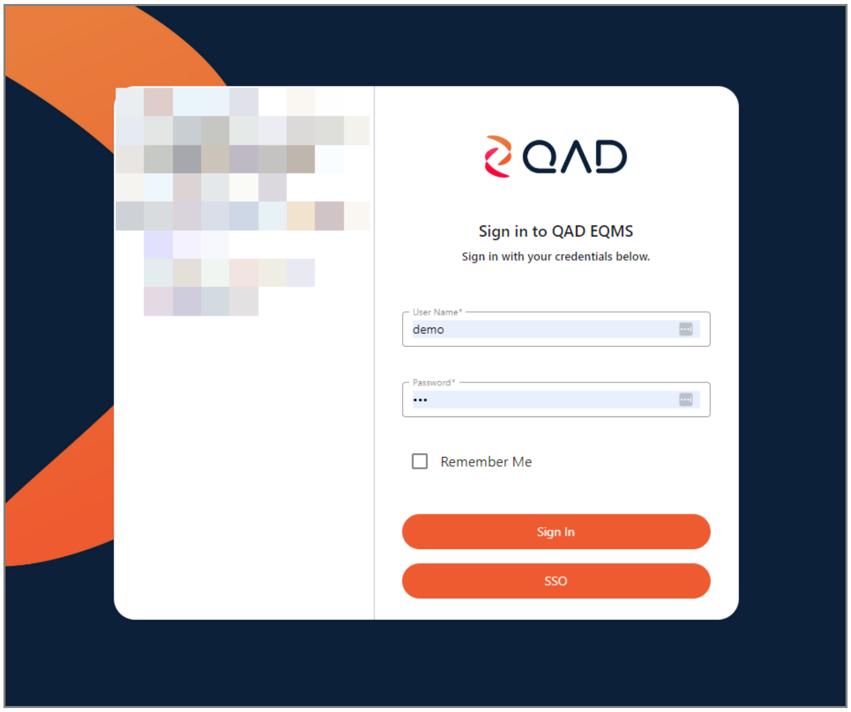
Accessing QAD EQMS

When you navigate to your company's QAD EQMS website, the login screen is displayed.

Fig. 1: Login Screen



Use the Sign In panel to enter your specific credentials for accessing the application.

Complete the following fields to access the system:

- **Username.** If you do not have a user name, contact your system administrator to get a user name.
- **Password.** Your unique password.
- **Remember Me.** Select this check box if you want the application to remember the user name and password you entered. By selecting this box, when you point your browser to the application Web site, you will automatically be logged in to the application as long as your user name or password have not changed.

  Note: This is only saved on the current computer you are using.

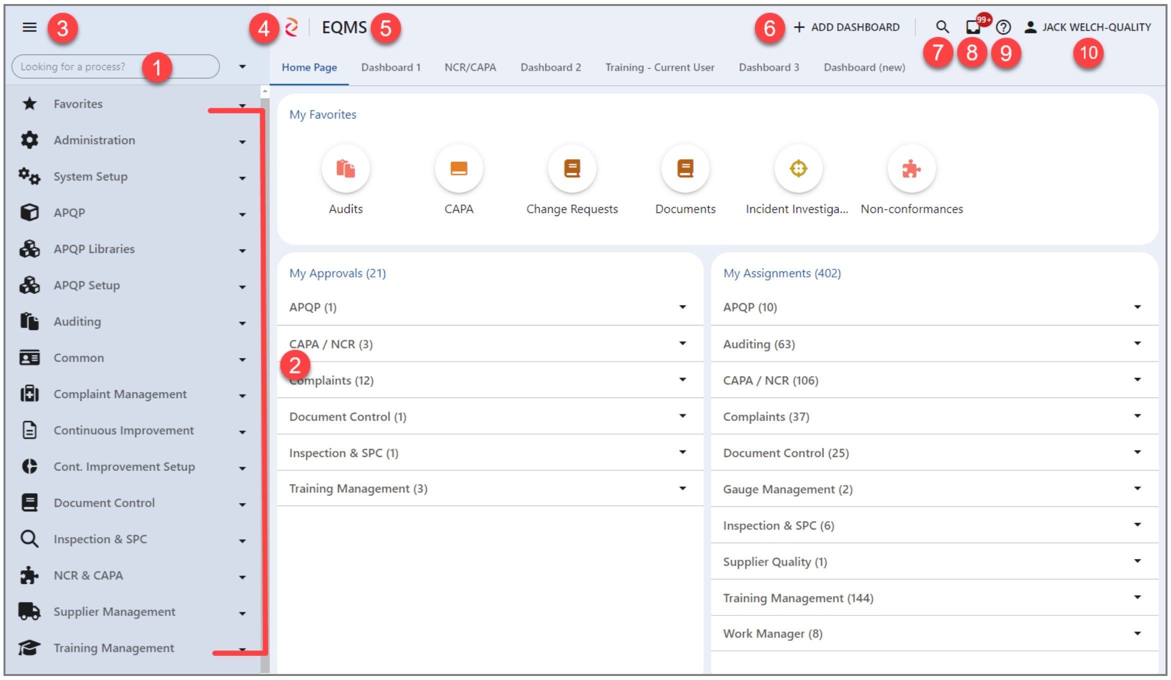
Click the Sign In button to access the application.

EQMS supports Single Sign On (SSO). If SSO is set up, you can simply click the SSO button to sign in.

The Information panel on the left can be modified to display company-specific information, such as a company logo. You can also use this area to display user instructions. For example, the Information panel could point users to a Web site where they can request a login for the application.

Desktop

Fig. 2: Desktop screen



The desktop screen consists of the following areas:

1. **Filter Navigation.** Find menu items quickly using the Filter Navigation box.
2. **Modules.** The navigation panel is organized by modules, which you can expand to show the processes underneath.
3. **Navigation Panel Pin.** The entire navigation panel can be minimized or pinned open. It will minimize automatically on tablet and mobile devices.
4. **Dashboard.** Click the house-shaped icon to navigate to the Home page (or to your default dashboard, if you have the Home page option turned off).
5. **Breadcrumbs.** To the right of the dashboard icon, a breadcrumb trail shows you where you are within the system at any given time.
6. **Add Dashboard.** Add a custom dashboard.

Like the breadcrumb trail, the Search, Help, Actions, and User icons are always visible.

7. **Search.** Use this global search feature to search for records within the system that have the search term in applicable fields and within files linked to File fields.

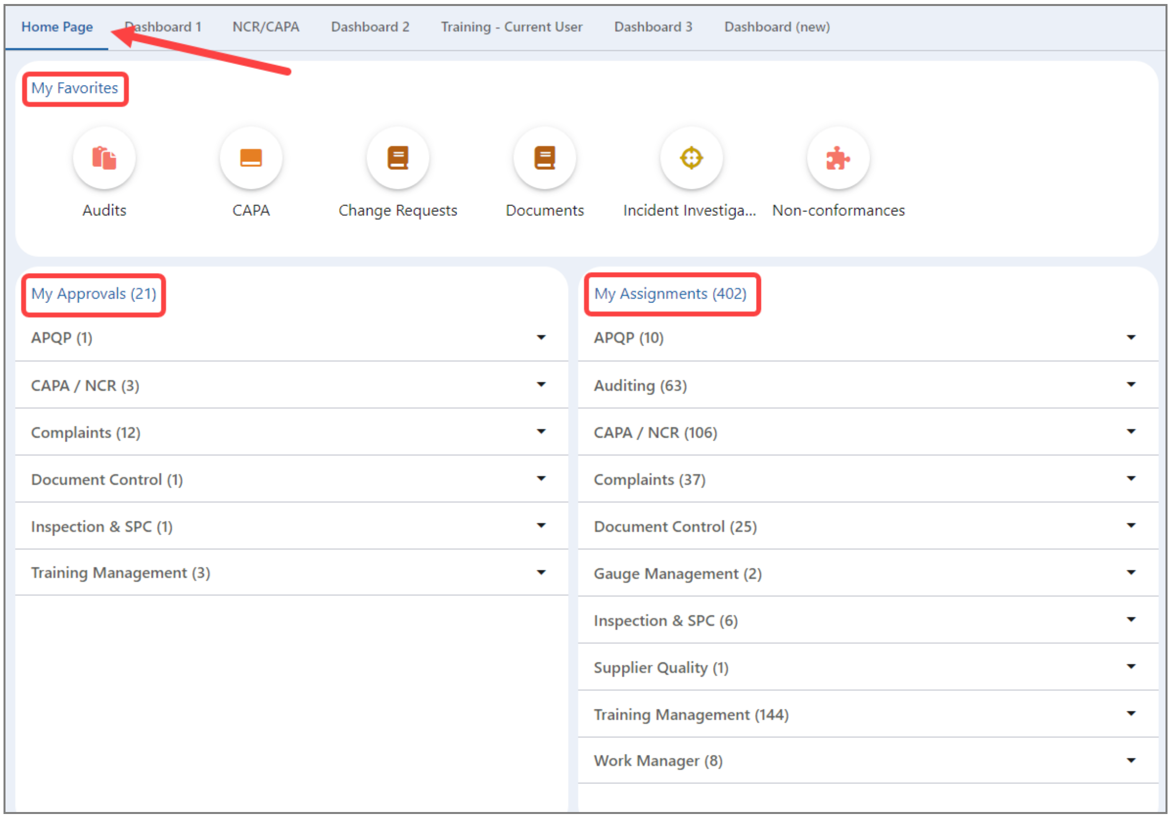
   Note: The global search feature is available to Cloud customers only.

8. **Inbox.** This icon opens the Inbox panel. The red number indicator displays the number of unread inbox actions assigned to you.
9. **More Help.** Click the More Help icon to access the document library and view details about the environment you are currently using, such as the database name and version number.
10. **User.** This icon opens the user settings in the right-side panel.

Home Page

The Home page is a system-managed dashboard designed to give quick access to your common activities (saved to My Favorites) and assigned inbox actions (My Approvals and My Assignments).

Fig. 3: Home Page

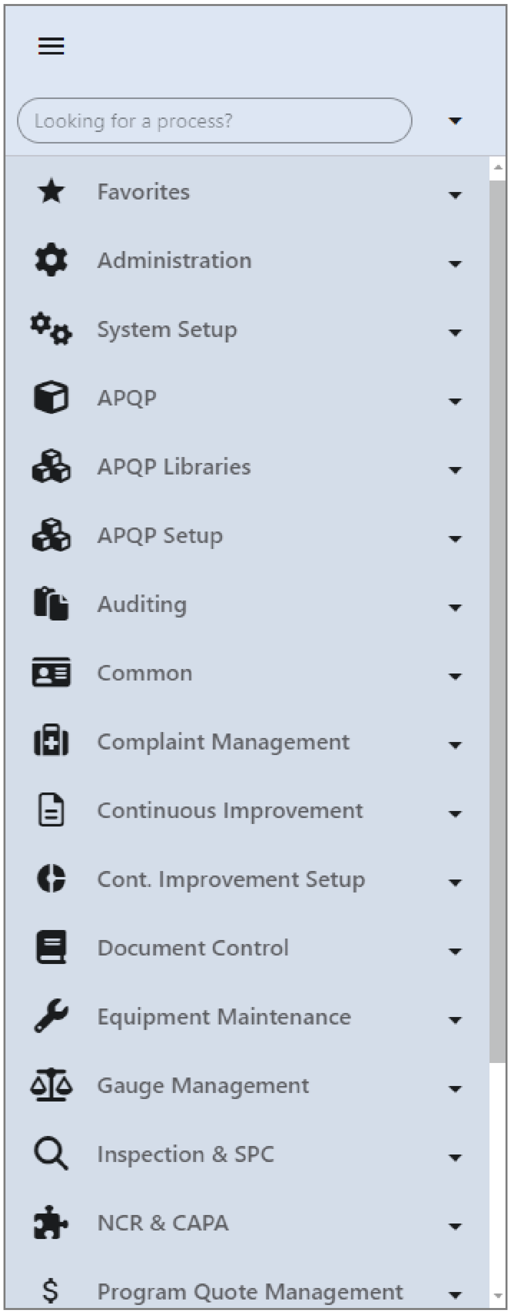


- **Home Page.** The Home page is always the first tab in your list of dashboards, unless it is shut off under user settings.
- **My Favorites.** The My Favorites section is automatically populated with any processes marked as a favorite. Each button opens the search screen for the relevant process.
- **My Approvals.** The My Approvals section allows you to see and manage any approval items assigned to you without having to open an additional screen.
- **My Assignments.** The My Assignments section allows you to see and manage any items assigned to you, or items you are being informed of, which you can acknowledge without having to open an additional screen.

Navigation

The navigation panel is one way of accessing the menu items available to you. The navigation area is a tree-like structure organized by modules, which can be expanded to display the menu items beneath them. By default, the navigation panel is displayed in an expanded (or pinned) view.

Fig. 4: Navigation Panel



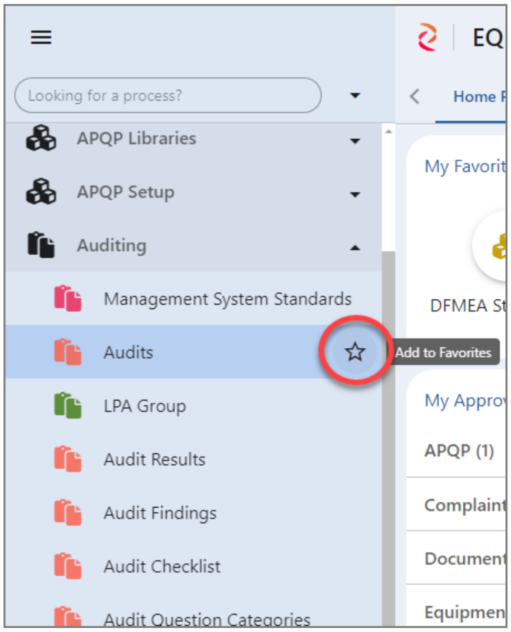
Use the triple line icon at the top to change the navigation panel from collapsed to expanded mode (or vice versa). When collapsed, hover over the navigation panel to expand it.

The search box is used to limit the modules and processes to only show items that match what has been typed. Click this box and begin typing to filter down your navigation.

> ***Note:*** Using this feature is very helpful if you have access to a lot of menu items. To show all items again, delete all the text or click the X in the search box.

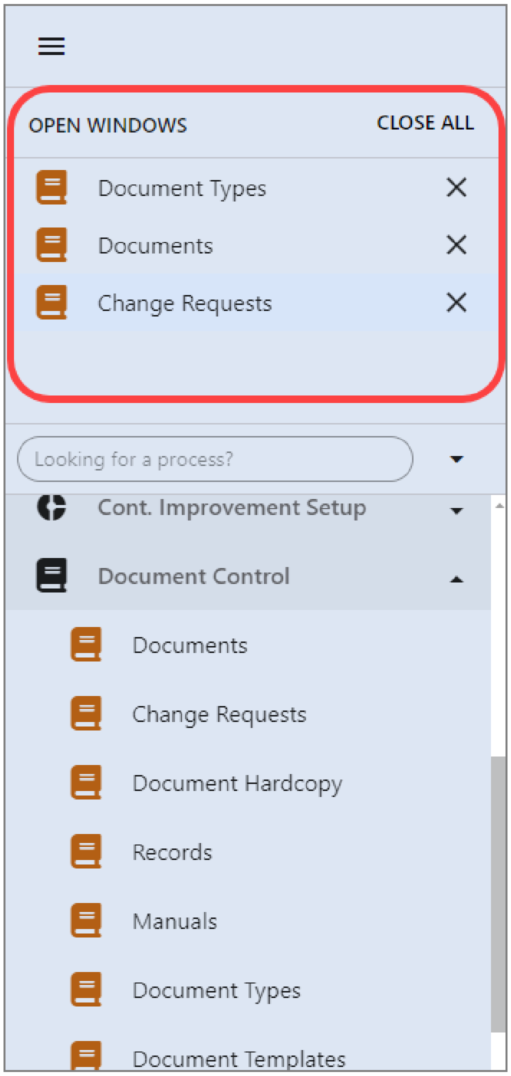
Any menu items that you mark as a favorite will show in the Favorites navigation group, as well as on your Home page and within your user settings. You can add a menu item to your Favorites by clicking the star icon that appears when hovering over an individual process, as seen in *Fig. 5: Add a Menu Item to Favorites*. Click this star again if you want to remove the menu item from your favorites.

Fig. 5: Add a Menu Item to Favorites



When you open a process, it appears in the Open Windows list at the top of the navigation panel. You can select an item in this list to return to that window without losing your changes. When you are finished with a window, click the X beside the window name, or click Close All to close all of the windows.

Fig. 6: Open Windows



Dashboards

Dashboards are configurable visual displays of information that provide a quick look into specific process details. By default, the first dashboard will always be the Home page, which displays your Favorites, Approvals, and Assignments. See "Desktop" on page 12 for more information.

You can create more dashboards and organize their data using gadgets, which are windows into process details you can interact with, similar to widgets on smart phones. See "Gadget Basics" on page 50 for more information.

Fig. 7: Dashboard

1. **Dashboards.** This bar is used to navigate between dashboards. If the Home page option is activated in user settings, then it is always the first dashboard.
2. **Selected Dashboard.** The selected dashboard's font is underlined and shows in the theme's main color. You can edit the name of the currently selected dashboard, or delete it as well.
3. **Add Dashboard.** Add a new dashboard.
4. **Add a Gadget.** Click the circular icon on the bottom right of the screen to add gadgets to your dashboard. The example in *Fig. 7: Dashboard* shows three gadgets: two bar graphs to display selected metrics and a search grid for the Documents process.

Inbox

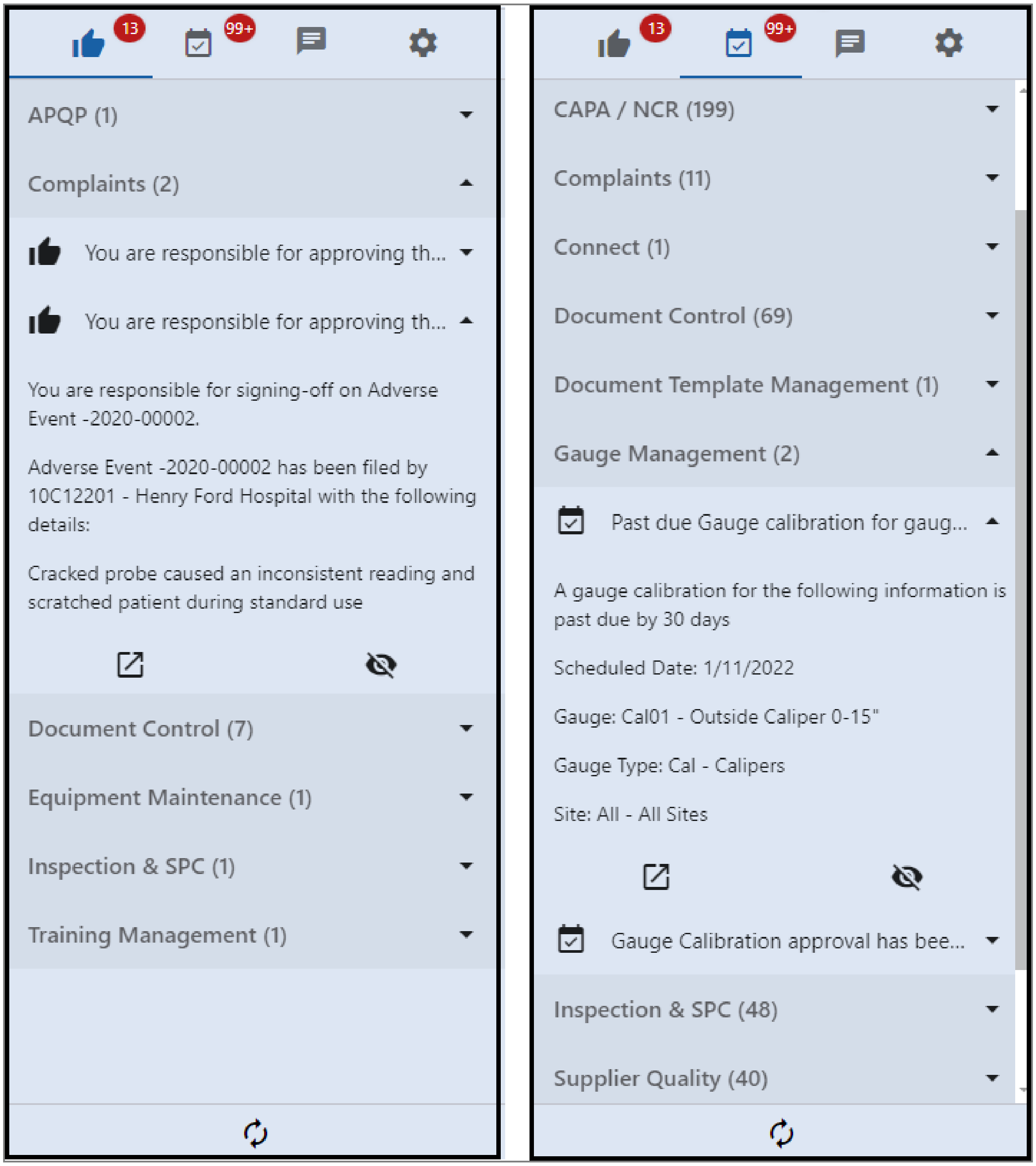
The inbox is the main mechanism used to automate processes throughout the organization. It notifies users when a task awaits them, whether that task is their responsibility or merely a notification. Tasks will remain on a user's list until they take the necessary steps to complete their responsibility, ensuring tasks are not lost or forgotten. See "Introduction to the Inbox" on page 41 to learn more.

Click the Inbox  icon to open the inbox panel on the right side of the screen. The red bubble numeric indicator displays the number of unread inbox actions assigned to you. The Inbox icon is available on every screen within EQMS.

Within the inbox panel, the thumb's up icon identifies the Approvals tab and the check box icon identifies the Assignment tab. The text box icon identifies the Comments tab, and the gear icon identifies the Settings tab.

The inbox actions (both approvals and assignments) are categorized by inbox action groups. You can expand each group to show the individual inbox actions within that group. A number beside the group title indicates the number of unread inbox actions pertaining to that group.

Fig. 8: Inbox Panel, Approvals and Assignments



When you click an inbox action, a row menu appears to display your options. You can open the detail screen of the inbox action, or mark the action as read or unread.

The inbox actions are brought up to date every few seconds, but if you want to force an update, you can click the refresh button at the bottom of the panel.

Chapter 3

Search Screen

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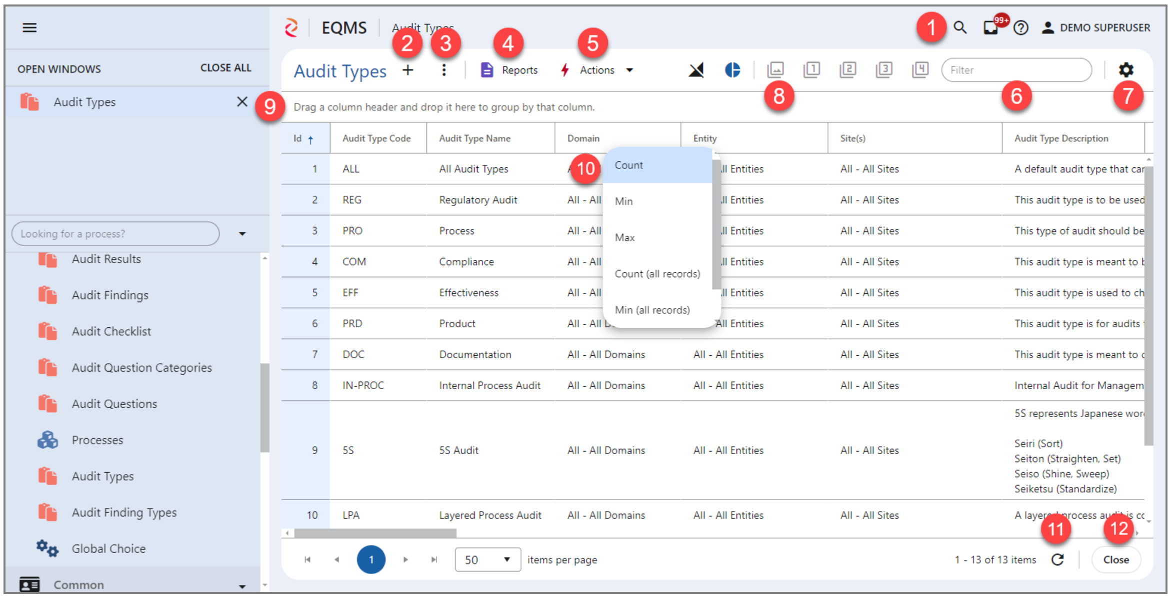
Search Screen

Search screens are the main method of navigating between records within a particular process. They can also be used to perform simple grouping and filter functions, which allow you to locate a specific record. Additionally, you can organize, create, and export reports. Double-click any row in the grid to open the detail screen for that record.

> ***Note:*** Access to these records may be restricted. In the Sites process, an optional feature exists, which is controlled by the "Restrict Access to Records Based on Site?" field. When enabled, this feature restricts records in each module to users who have the matching Responsible Site and Additional Site(s) selected in their Employees record. This does not include records whose Site field is set to All Sites or is null.

Fig. 9: Search screen

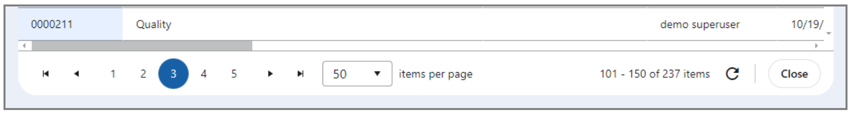


1. **Global Search.** Search for records within the system that have the search term in applicable fields and within files linked to File fields.
2. **Add New.** Opens a new detail screen for this process in Add New mode.
3. **More.** Contains additional functions, including the ability to add or remove the process as a favorite.
4. **Reports.** Opens the Reporting screen, including Easy Reports.
5. **Actions.** Contains the Export and Bulk Operation functions.
    a. **Export.** Reveals options to export the contents of the search screen to various formats (Excel, PDF, etc.).
    b. **Bulk Operation.** Turn on and off the ability to select more than one record at a time for bulk updates.
6. **Search.** Search records for key phrases.
7. **Filters.** Reveals filter and layout options for the search screen.
8. **Quick Filters.** One-touch quick filters can be assigned to a numbered icon, which will run the assigned filter (and layout, if assigned to that filter). See "Adding a Filter" on page 25 to learn how to assign filters to these one-touch filters.

9. **Grouping.** Drag columns here to group by those columns. Click the column headings to change the column sorting. The arrow indicates whether the sort is ascending or descending.
10. **Column Drop-down**. Access aggregate functions by hovering over a column and clicking the wedge icon.
11. **Refresh.** Reloads the search screen content.
12. **Close.** Return to the previous screen, which is typically the dashboard.

The bottom of the search screen contains controls for paging through process records and controlling the number of records per page.

Fig. 10: Paged Data



The controls include:

- Buttons for Next and Previous pages.
- Buttons for First and Last pages.
- Option to select the number of records per page (10, 20, 25, 50, and 100).

  The default number of records per page can be changed in Admin Tools>System Setup>Performance Options. See the Admin Tools user guide for more information.

- Indication of the number of records currently displayed.

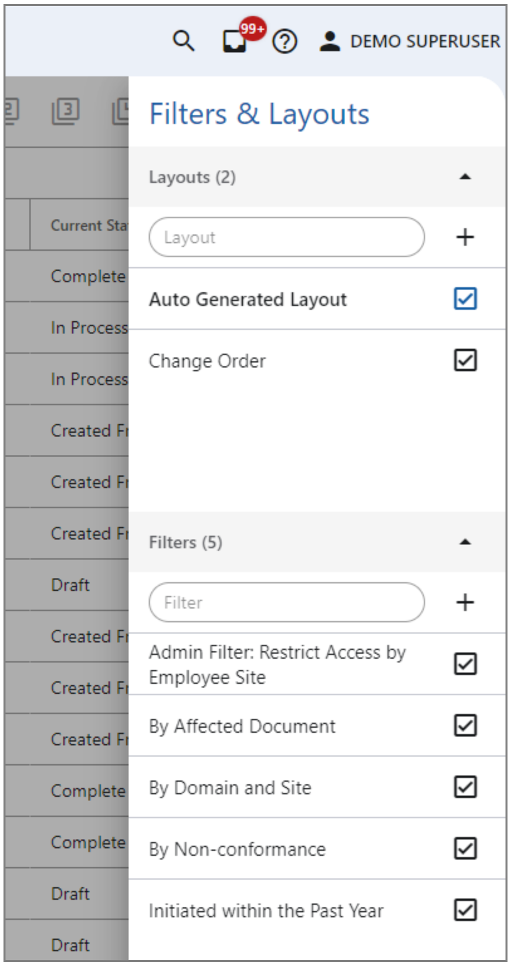
Filters & Layouts Panel

Click the gear icon in the toolbar to open the Filters & Layouts panel, which opens on the right side of the screen. Additionally, you can select Show Filter Row, which allows you to filter each column individually.

With the Filters panel, you can add filters to a search screen to adjust the information within the grid. This is useful when you are looking for specific items, such as Official documents used in maintenance procedures, or when you want to remove certain data from the list, such as Obsolete documents. Filter categorization can be as broad or narrow as you need it to be.

In addition to creating filters, this panel contains layouts, which gives you full control of the data in the grid and how it is presented.

Fig. 11: Filters and Layouts Panel

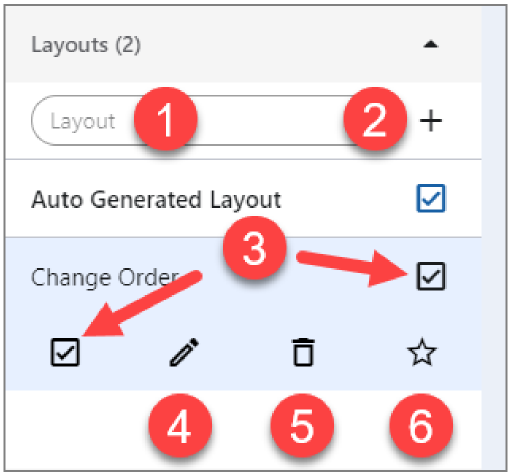


Layouts

Layouts give you the ability to set up a search screen data grid, which controls the columns shown, column order, sort order, fields to be searched, and more. Layouts can also be linked to specific filters.

The top section of the Filters & Layouts panel shows the layouts defined for the search screen. By default, this list only contains one layout, unless additional layouts have been created by you or created at the time when the process was created.

Fig. 12: Layouts



1. **Search Bar.** Use this field to search the list of layouts by key phrase. This can be useful if there are several layouts in the list.
2. **Add.** Click the Add Layout button to add a new layout.
3. **Apply.** Highlight a layout in the list and click the Apply button to make that layout the default for this search screen for your user. You can also click the Apply button beside the layout.
4. **Edit.** Highlight a layout in the list and click the Edit button to edit the layout.

   Note: If the layout was not created by you, then you will not be able to save your changes.

5. **Remove.** Highlight a layout in the list and click Remove to delete the layout.

   Note: If the layout was not created by you, then you will not be able to remove it.

6. **Default.** Highlight a filter in the list and click the Default button to save the filter as the default view.

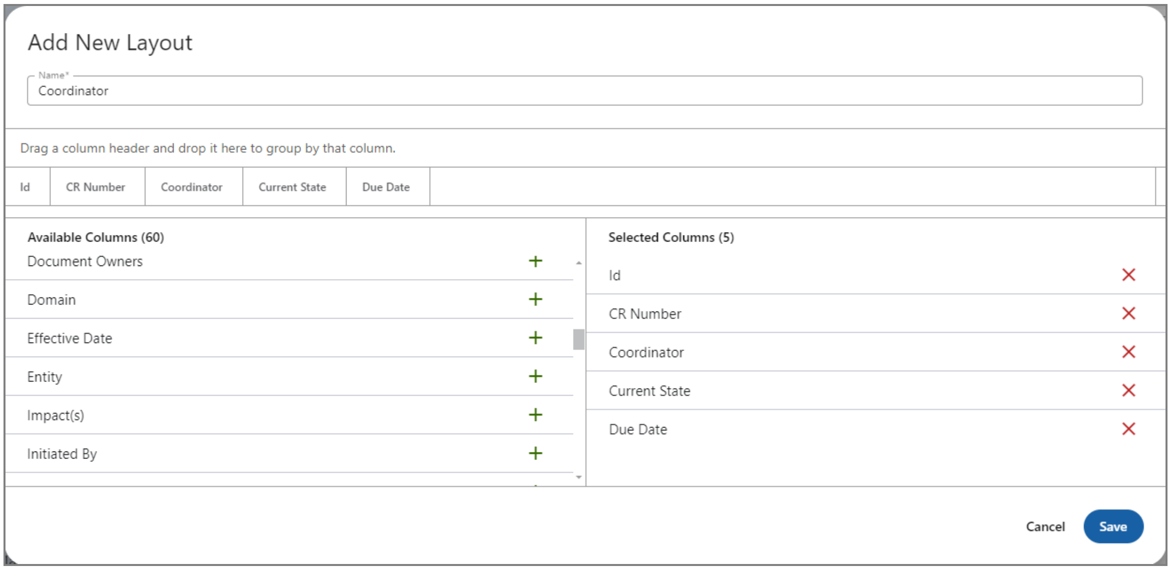
Adding a Layout

When adding a layout, be sure to label it properly by giving it a meaningful title.

The grid in the Add Layout window provides a preview of how your layout will look. It also allows you to set sorting and grouping. Click a column's header to sort by that column; drag and drop a column's header to the area above the headers to enable grouping by that column. Hold the Shift key to select and sort two or more items at once.

To add an available column to your layout, simply click the Plus button. To remove it, simply click the X button.

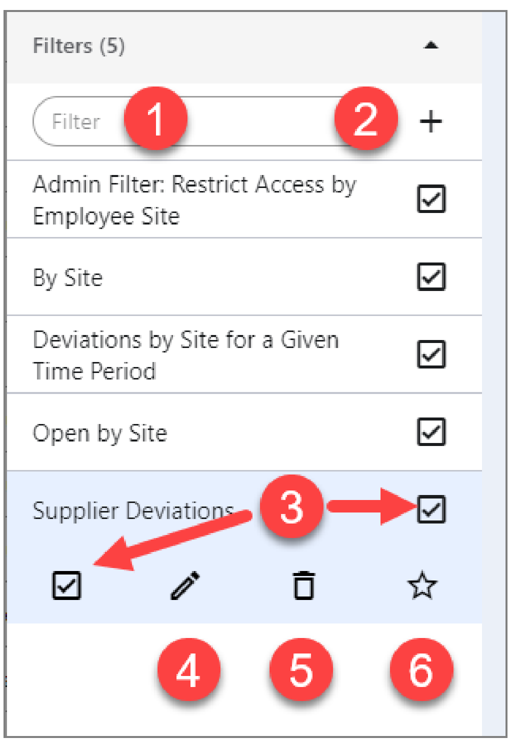
Fig. 13: Add Layout



Filters

The bottom section of the Filters & Layouts panel contains filters that have been defined for the search screen. This list includes pre-made filters, as well as any additional filters that you have created.

Fig. 14: Filters Panel



1. **Search Box.** Search the list of filters by key phrase. This can be useful if there are several filters in the list.
2. **Add.** Click the Add Filter button beside the search box to add a new filter.
3. **Apply.** Click the Apply button to make that filter the default for this search screen for your user. You can also click the Apply button beside the filter.
4. **Edit.** Highlight a filter in the list and click the Edit button to edit the filter.

   Note: If the filter was not created by you, then you will not be able to save your changes.

5. **Remove.** Highlight a filter in the list and click the Remove button to remove the filter.

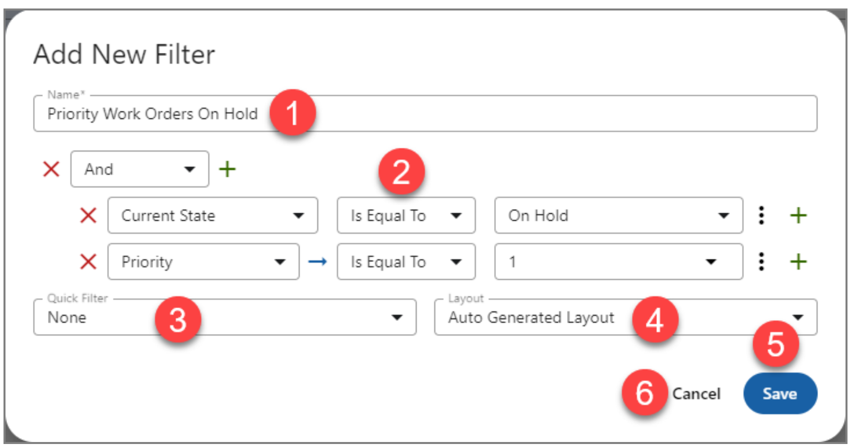
   Note: If the filter was not created by you, then you will not be able to remove it.

6. **Default.** Highlight a filter in the list and click the Default button to save the filter as the default view.

Adding a Filter

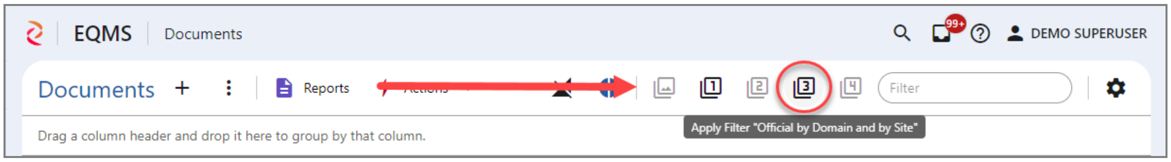
Filters allow you to specify which data you want to see in the search screen's grid. While layouts allow you to choose the columns that display, filters allow you to be more specific in your selection by restricting which sections of each column display. You can filter results for one or several columns.

Fig. 15: Adding a Filter



1. **Title.** Give the filter a meaningful name.
2. **Filter.** Use the visual filter builder to create the filter's criteria statement.
3. **Quick Filter.** Assign this filter to a one touch button, which can be selected directly from the numbered icons in the toolbar for faster filtering. Select None if you do not want this filter available as a one touch button.

Fig. 16: One Touch Buttons in the Filter icon

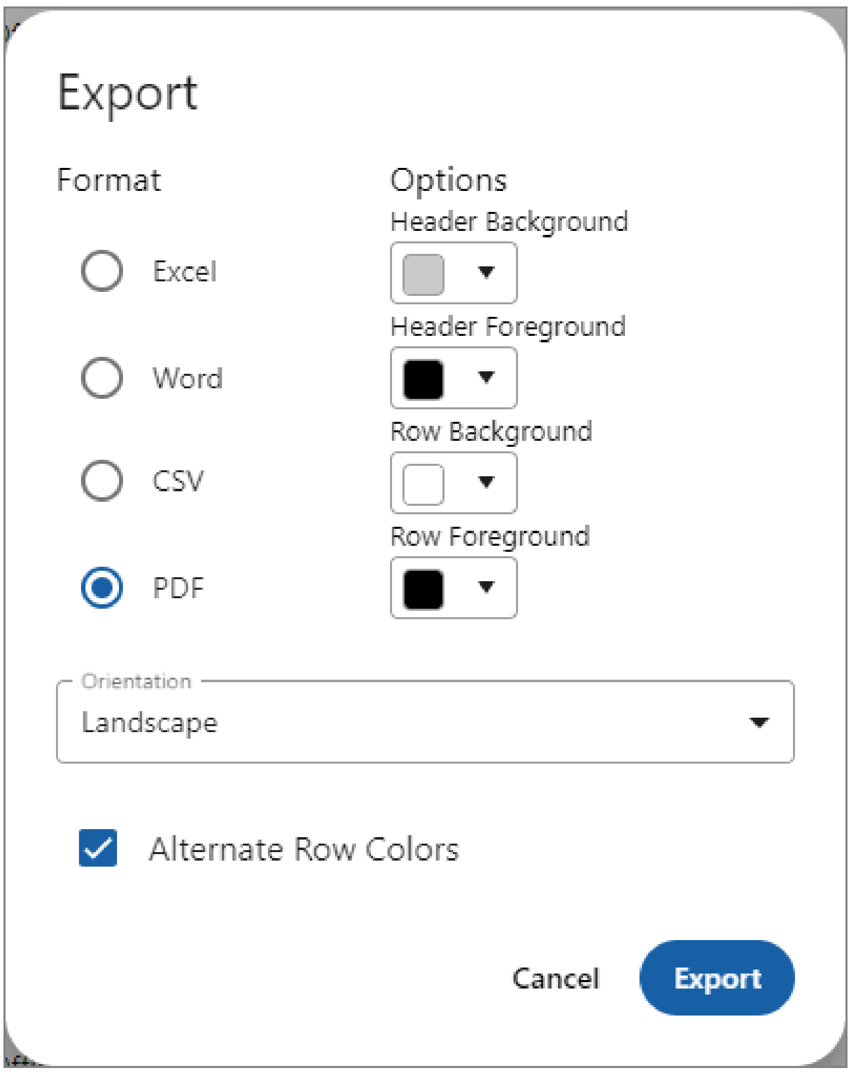


4. **Layout.** Select a layout to be used as the default when this filter is applied.
5. **Save Button.** Click Save to save any changes you have made.
6. **Cancel Button.** Click Cancel to discard any changes you have made.

Search Screen Export

You can export a search screen's information to various formats, which can then be shared with other users.

Fig. 17: Search Screen Export



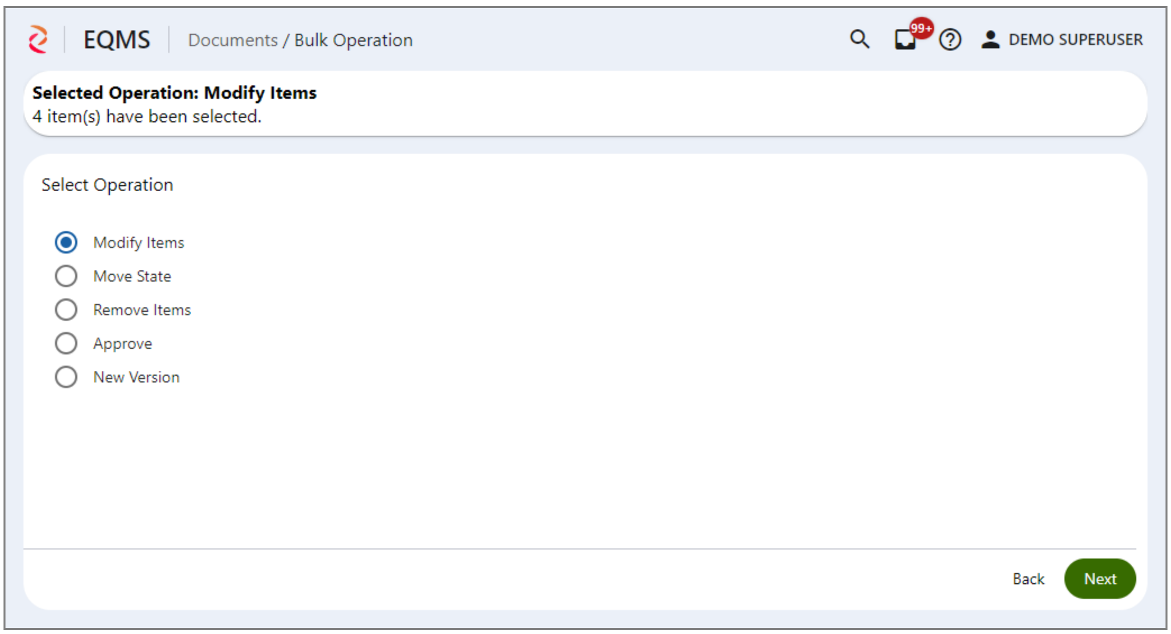
- **Format.** Select the format of the export file.
  - **Excel.** Microsoft Excel file format.
  - **Word.** Microsoft Word file format.
  - **Csv.** Comma-separated values file format.
  - **Pdf.** Adobe Portable Document file format.
- **Options.** Depending on the export format, some color formatting options are available. You can also choose to alternate the row colors.
- **Export.** Click Export to proceed.
- **Cancel.** Click Cancel to abort the export.

Bulk Operation

You can turn on and off the ability to select more than one record at a time for bulk updates. Users with the Bulk Update Admin account setting have greater abilities for bulk operation.

After Bulk Operation is enabled, check boxes appear beside each record. Select two or more of these, and a Next button becomes available in the lower-right corner. Click this button to move to the next screen.

Fig. 18: Bulk Operation screen, Selected Operation menu



- **Modify Items.** Allows you to edit one or more fields of the selected records. Field visibility rules are ignored.
- **Move State.** Allows you to change the state of the selected records. You can only move to a state that is available for each record.
- **Remove Items.** Deletes the selected records, if you have permission to remove them.
- **Approve.** Allows you to approve the selected records at once.
- **New Version.** Creates a new version of the selected records.

Chapter 4

Detail Screen

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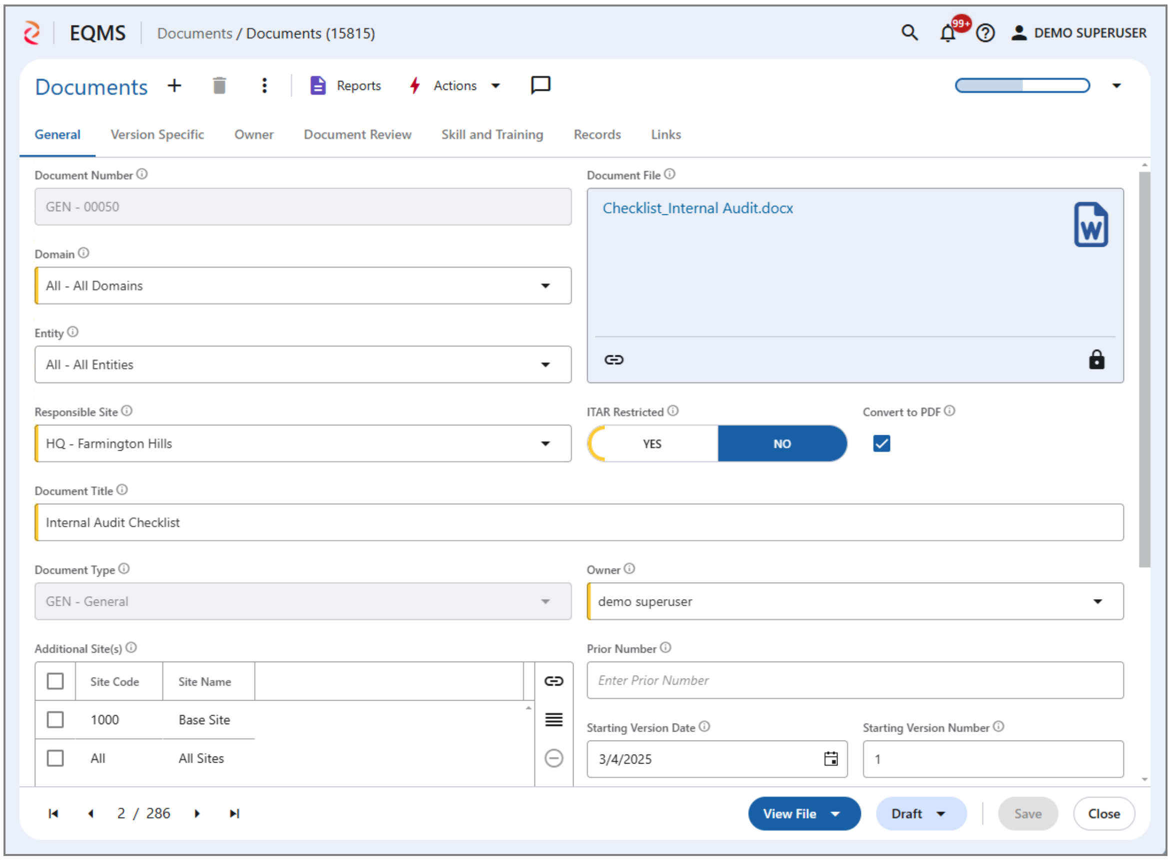
Introduction

The Detail screen is the main screen you will interact with to view and modify data for a process. Although the available fields and their arrangement may change from process to process, the main features of a detail screen do not change. Therefore, once you understand these main features, you will be able to confidently view and modify data, regardless of the process.

Detail Screen Layout

Fig. 19: Detail screen



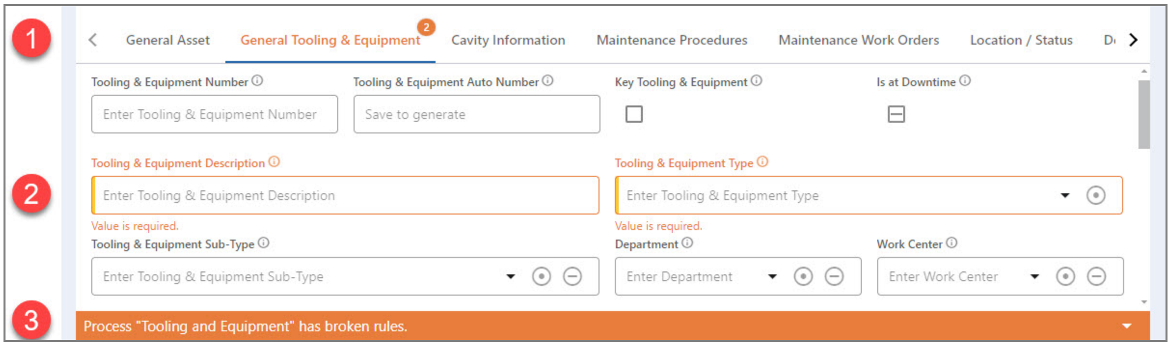
Breadcrumbs, located at the top-left of the screen, show where you are in the system and the path that led you there. Click each breadcrumb to navigate back to that page. You can also click the Close button in the bottom toolbar to exit the detail screen. In the bottom-left corner of the screen, a record navigator allows you to directly navigate between records on the search screen.

Depending on the size of your screen and the technology you use to access EQMS, the Detail screen will appear in section view or tab view. Regardless of which view is utilized, you can easily navigate between sections and tabs using the tab control at the top of the screen. The current tab/section is underlined in a separate color.

Each process has multiple fields available for information entry, but only a few are required. It is suggested you fill out all applicable fields, but in order to save and proceed on a process, you must populate all required fields. These fields are indicated in many ways, as seen in *Fig. 20: Required fields*.

1. A numbered badge beside a tab, which indicates how many required fields are within that tab. In section view, section headers are visible just above the fields within each section.
2. Color on each required field's header and field lines, along with a note that values are required.
3. A notification stating "Not all required fields are populated." Click this notification to see which fields still require data.

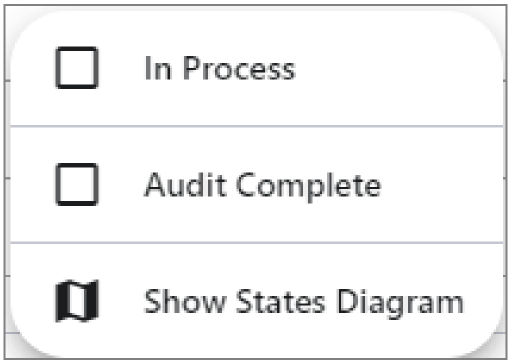
Fig. 20: Required fields



Click the current state in the bottom toolbar to display a drop-down containing several items, as seen on *Fig. 21: Current State Drop-Down*.

- The current state for the record is visible when the drop-down is closed..
- When the state drop-down is open, a list of all available states is visible, based on configuration and security. Select a state and click Save to transition to that state.
- The bottom option, View State Map, opens the process' full state map. The state map displays the transitions that occur from one state to the next, and highlights the states the record has moved through. Mouse over a state to show the date when the record entered that state.

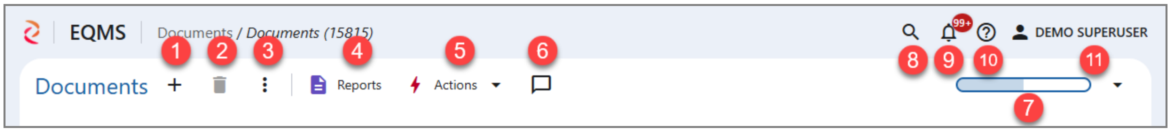
Fig. 21: Current State Drop-Down



Detail Screen Toolbar

Although the icons in the toolbar differ depending on which process you are working in, many of them remain the same. *Fig. 22: Detail Screen Top Toolbar* below displays one of the most common detail screen toolbars, while *Fig. 23: Detail Screen Bottom Toolbar* displays the bottom toolbar.

Fig. 22: Detail Screen Top Toolbar

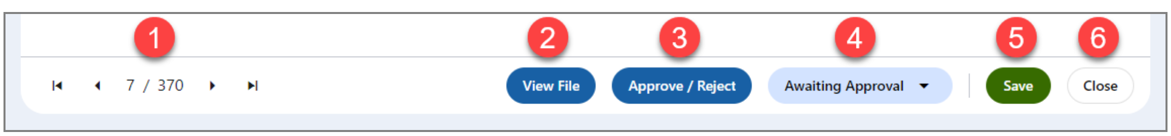


1. **New.** Creates a new record.
2. **Delete.** Deletes the current record.
3. **More.** Contains additional functions, including:
    a. **Refresh.** Refreshes the current record. Unsaved changes will be overwritten.
    b. **Reload.** Reloads the current record. Unsaved changes will be preserved.
    c. **Duplicate.** Creates a new record by copying certain fields from the current record, based on setup.
    d. **View Versions.** Opens the Versions panel to view a list of versions for the current record.
    e. **Scheduled Items.** Allows you to modify an item's schedule details.
    f. **E-mail.** Opens an interface that allows you to send an email.
4. **Reports.** Opens the report options.
5. **Actions.** Contains actions specific to the current record and the current state.
6. **Comments.** Add a comment to the record. Mention a user with the @ symbol, and the system will send them an inbox notification and e-mail.
7. **Progress Summary.** Provides a visual progress indicator to show where the record is within its lifecycle.
8. **Global Search.** Allows you to search for records within the system that have the search term in applicable fields and within files linked to File fields.

    Note: The global search feature is only available to Cloud customers.

9. **Actions.** Opens the Inbox panel.
10. **More Help.** Displays a drop-down field with options for Help and About pages.
11. **User Menu.** Contains settings and the Log Out function.

Fig. 23: Detail Screen Bottom Toolbar



1. **Record Navigator.** Navigate between detail records of the current process.
2. **View File.** Opens the attached file, if the record contains one and the View File button is visible on the record's file control. Otherwise, this button is hidden.

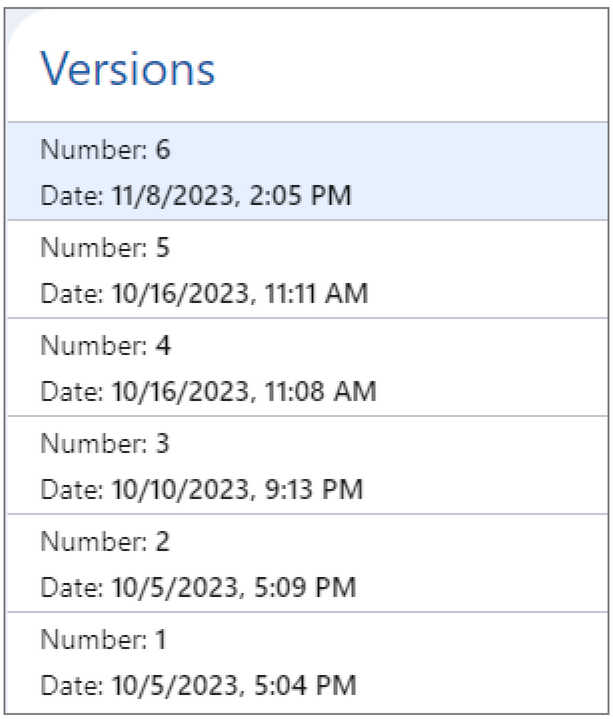
3. **Approve/Reject.** Allows you to approve or reject the record, if it is your turn to do so. Otherwise, this button is hidden.
4. **State.** Displays the current state for the record. This drop-down menu allows you to change the state.
5. **Save.** Saves the current record.
6. **Close.** Closes the current record.

Versions

If versioning is enabled, the Versions option is displayed under More in the top toolbar. Click Versions to open a panel on the left side of the screen, which shows a list of versions for the current record. This list includes historical versions and the pending version.

Click one of these versions to switch your detail screen view to the selected version.

Fig. 24: Versions Panel

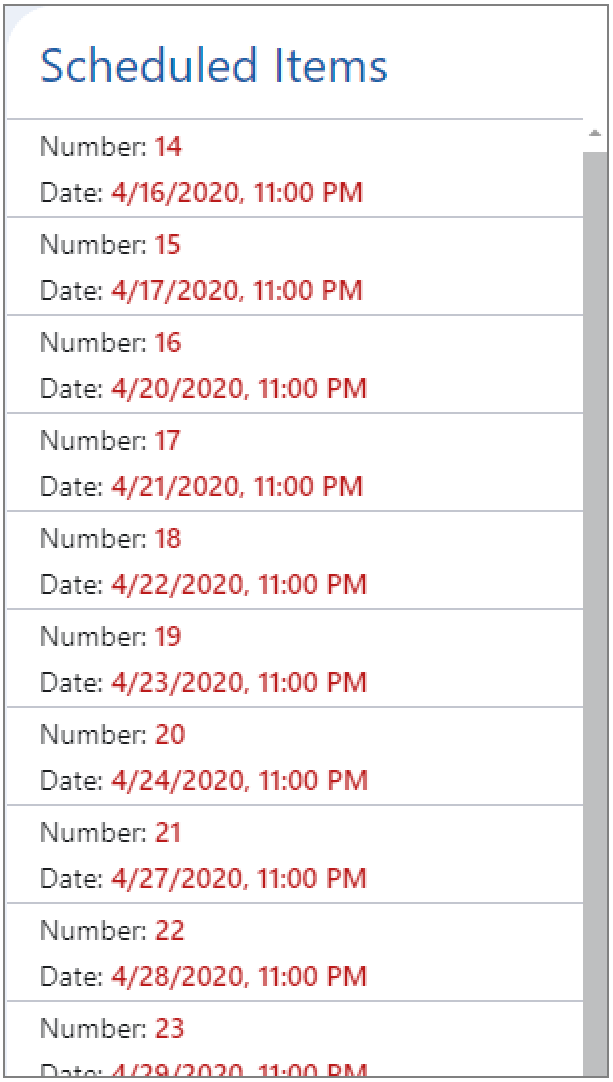


Scheduled Items

If scheduling is enabled, then the Scheduled Items option is displayed under More in the top toolbar. Click Scheduled Items to open a panel on the left side of the screen that shows a list of scheduled items for the current record.

Click one of these items to open a detail screen view for the selected item.

Fig. 25: Scheduled Items Panel

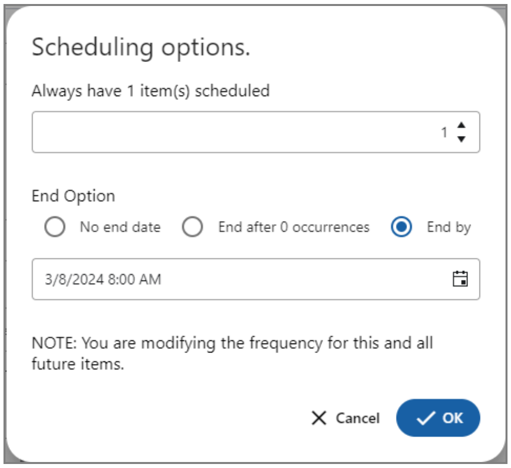


Scheduling Options

If scheduling is enabled for a process, then you can use the Scheduling Options dialog to modify an item's schedule details. Changing the scheduling options is similar to modifying a re-occurring appointment in a typical calendar application.

You can open the Scheduling Options dialog by opening the Actions drop-down and selecting "Adjust Schedule Dates".

Fig. 26: Scheduling Options



Always have X item(s) Scheduled. The number of items that will remain scheduled. For example, if this number was 6 and the frequency was monthly, then the system would automatically keep 6 months of scheduled items available.

End Option. The End Option defines when the system will stop scheduling.

- **No end date.** The system will always schedule items.
- **End after X occurrences.** The system will schedule the item until the specified number of items have been scheduled. For example, if X = 10, then the system will stop scheduling items after 10 have been added.
- **End by selected date.** The system will stop scheduling items after the date specified.

Attachments

Attachments allow you to point to a URL or attach a file to a detail record. Open the Attachments dialog by clicking the paperclip icon in the top toolbar.

Some processes allow you to upload or link attachments directly within a tab, which provides easier review of external information related to that process. You can also click the View File button in the bottom toolbar.

Fig. 27: Attachments Screen – URL

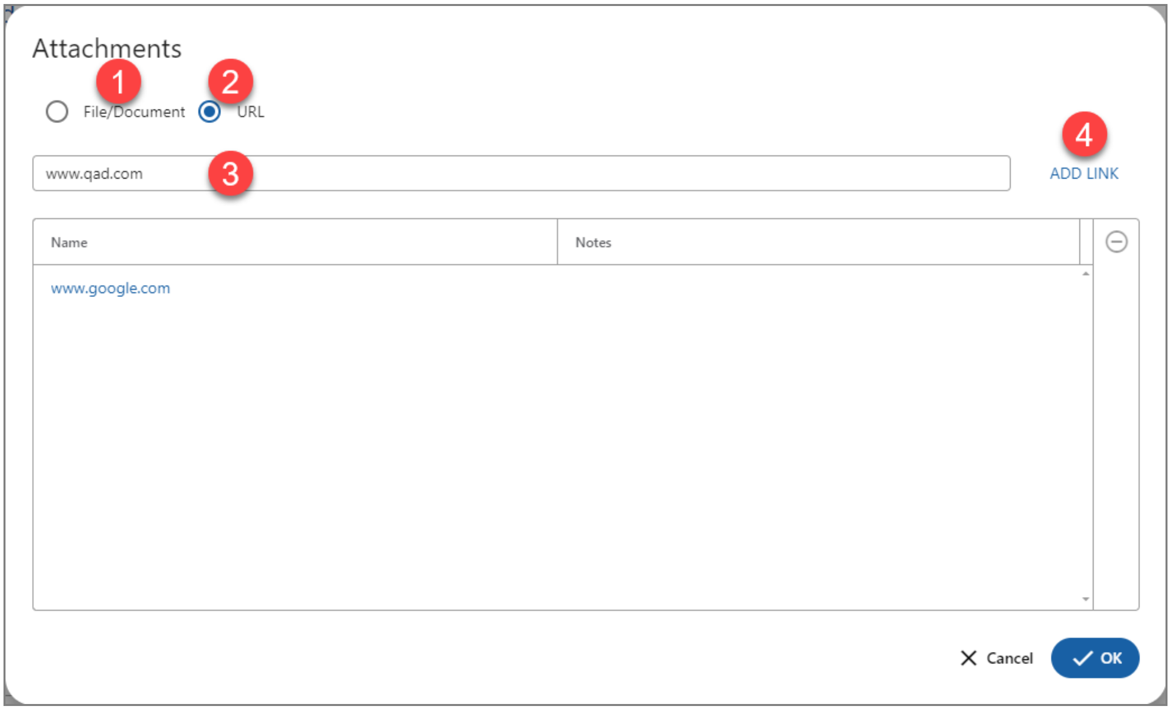
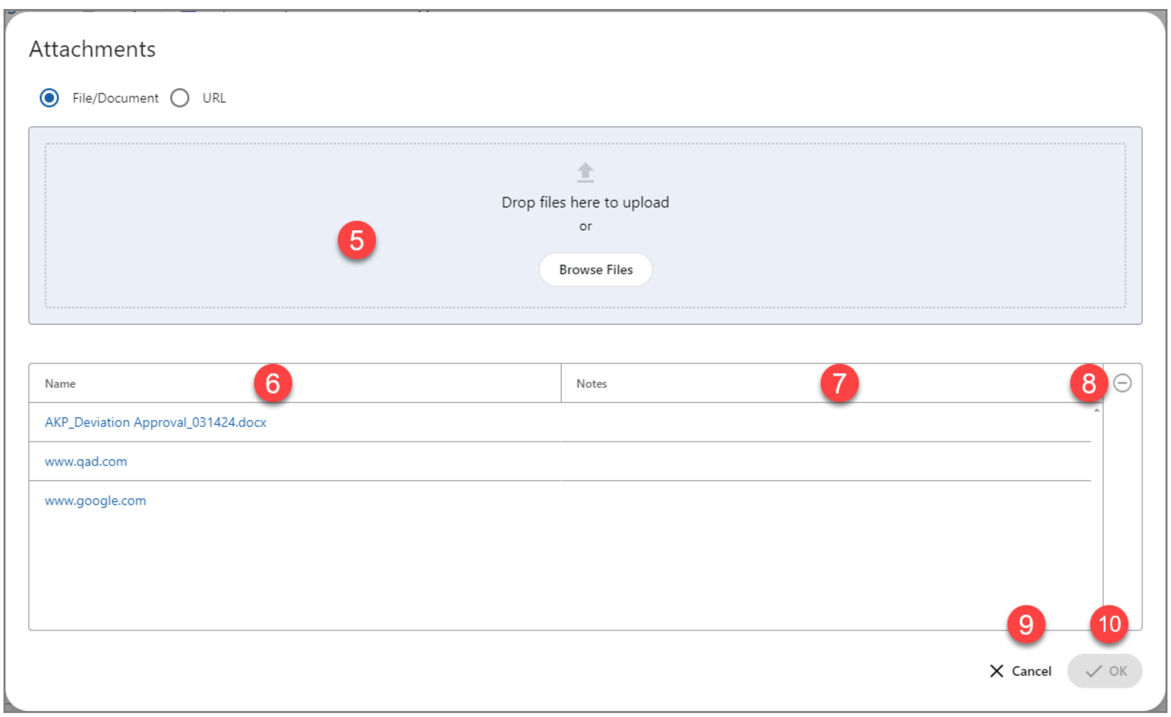


Fig. 28: Attachments screen – File/Document



1. **File/Document.** Click this radio button for the option to upload a physical file as an attachment.

2. **URL.** Click this radio button for the option to point to a Web address rather than a physical file. This functions similarly to a browser bookmark.
3. **Link URL Box.** Type or paste the link here.

   Note: In most cases it is easier to navigate to the link in a tab or another browser window, then copy the hyperlink address and paste it here.

4. **Add Link.** Click this button to add the link to the current attachments list. This option is only displayed if you select the URL radio button.
5. **Select Files to Upload.** Click this button to browse for files to upload, or drag and drop files to the upload area.
6. **(Name) Current Attachments List.** This area shows you the list of attachments added to this record.
7. **Notes.** Edit the Notes section to provide meaningful details about each attachment, including what is contained in the document. This prevents users from having to open the attachment to confirm its contents.
8. **Remove.** To remove an attachment, highlight the attachment then click the remove button.
9. **Cancel.** Click Cancel to revert any changes made to attachments.
10. **OK.** Click OK to save the changes made to attachments.

Email

Email messages can be sent from any detail screen. The message will be sent from the EQMS email service through your company's email server, but it typically would not be saved in the Sent Items folder of your email client. This feature is not often needed due to the built-in notifications within EQMS; however, email is a good way to share information with another user or to send as a reminder to the responsible person.

To open the Email screen, click the More drop-down in the top toolbar, then select Email.

Fig. 29: Email Screen

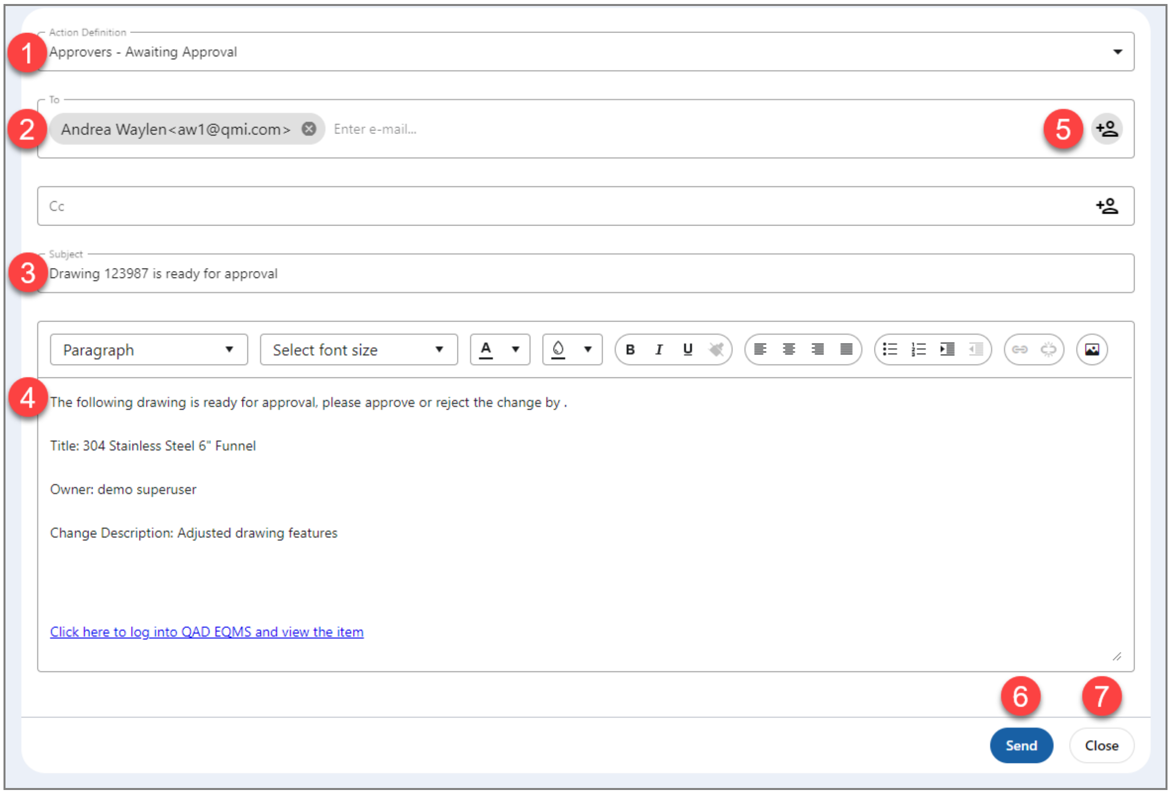
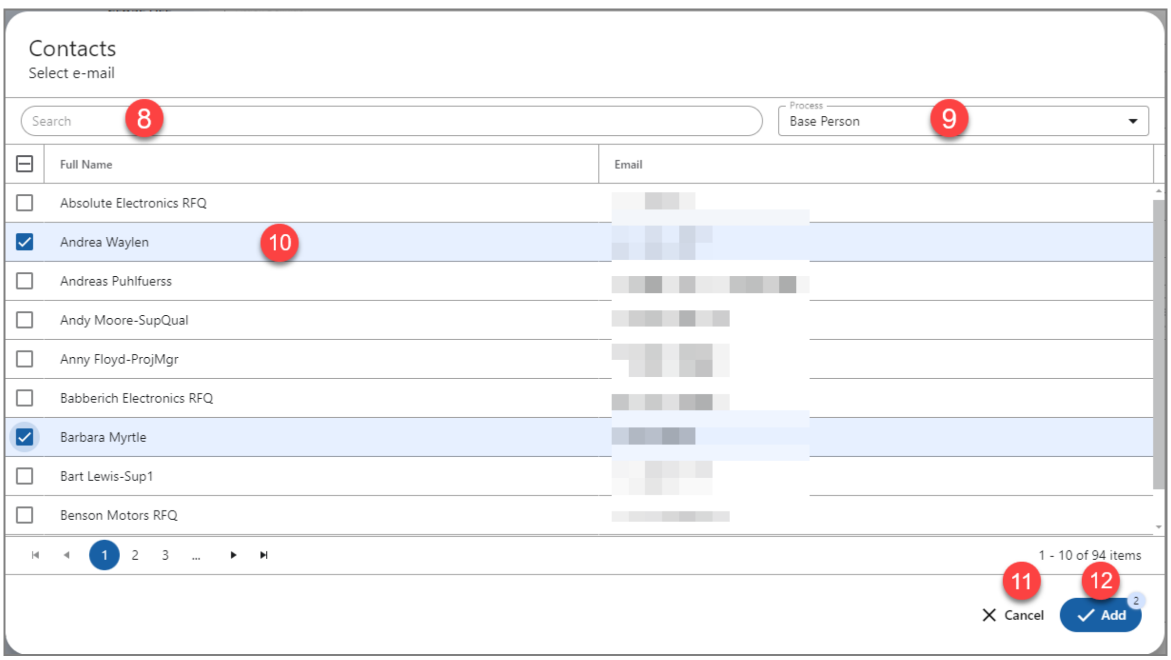


Fig. 30: Email Screen – Contacts



1. **Action Definition.** Click this drop-down field to display any actions defined for the process you are emailing from. Selecting an action definition automatically populates the

email message's To and Subject fields, as well as the body, with the definition details.
2. **To.** Selecting an action definition automatically populates the To field with the value that defines who should receive the action item. Often, this is based on a role or a list of people defined in the process.
3. **Subject.** The Action Definition selection automatically populates the Subject field with the topic of the action definition.
4. **Body.** The Action Definition selection automatically populates the Body field with the message from the action definition.

Note: The Subject and Body definitions can contain parameters based on the fields available in the process. If this is the case, those parameters will be replaced with the current values when you select an Action Definition. This allows you to create standard formatted messages that can be quickly and easily sent.

5. **Add Recipient.** Select recipients for the message by clicking the Add Recipient icon in the To or CC fields, which opens the Contacts dialog. The Contacts dialog allows you to choose who to send the e-mail message to using data already entered into EQMS. The dialog lists any data entered in the system for the Base Person or Employees processes.
6. **Send.** Click to send the e-mail message.
7. **Close.** Click to close the screen and cancel the e-mail message.
8. **Search.** Type within the keyword search box to limit the list based on the value entered.
9. **Process.** Select a process to display names from. This drop-down lists all processes that use Base Person. Select a value here to narrow the list down to just Employees, Contacts, and so on.
10. **Name List.** Double-click a person's name or select their check box to add them to the To or CC list.

Note: Only people with an e-mail address are added to the list.

11. **Cancel.** Click Cancel to close the Contacts dialog without modifying the e-mail message.
12. **Add.** Click Add to update the e-mail message with the new selections.

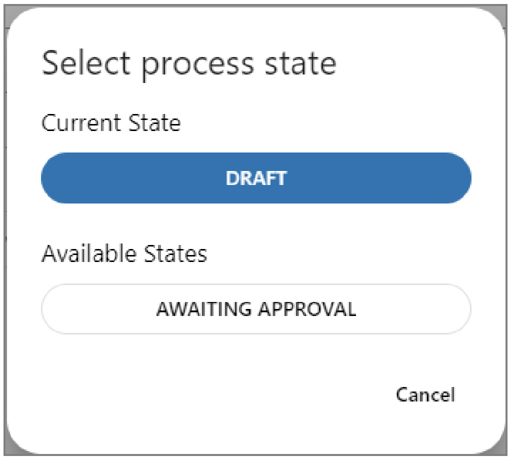
Changing States

State is a very important concept in EQMS because it enables the workflow engine. You can change an item's state in the following ways:

- Manually changing the state when saving an item.
- Manually changing the state from the Save button in the detail screen's bottom toolbar.
- Automatically changing the state based on an approval process.

Some items may require an approval process, which is fulfilled depending on several setup options. Upon completion of the approval, the state of an item is automatically changed to either an approved or rejected state.

Fig. 31: State Change



The Select Next State dialog automatically displays after you save an item, as long as you have system permission to move the item to another state.

- **Current State.** The current state of the record. Click this state to save the record without changing the state.
- **Possible States.** A list of states the record may transition to, depending on the current state, state diagram, and user security. Click one of these possible states to change the state upon save.
- **Cancel.** Close the window without saving any changes or moving the state.

Chapter 5

Inbox

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Introduction to the Inbox

The Inbox is the main mechanism utilized to automate workflow throughout EQMS.

Most processes in a Management System Standard require multiple people, departments, or groups to coordinate on completing a process. Without an automated system to help organize that coordination, employees turn to phones, email, or other means to notify users they must complete part of a process. The problem with this non-structured approach is that, if the person next in line does not complete the task right after being notified of it, the assigned task often gets forgotten or lost.

The Inbox allows any process user to notify the appropriate users at the right time in the process that they have an action or approval to complete, or simply that something happened in the process they should know about. Once an item is added to a user's Inbox list, the item is not removed until the action is complete. Therefore, actions are not forgotten or lost.

An individual inbox action item represents a single task, approval, or notification that has been sent to you. This task will remain in your Inbox until necessary steps are taken for completion or the task is acknowledged (if applicable). It exists as an email notification (optionally) and the on-screen Inbox portion of the EQMS desktop.

There are two types of Inbox items:

- **Approval type.** An item is ready for your approval. You are required to take some action in the system to move it beyond your workflow.
- **Assignment type.** This is a notification only. You can open the record to take action, or acknowledge the notification and it will go away.

Layout

Assignment Inbox Action Item

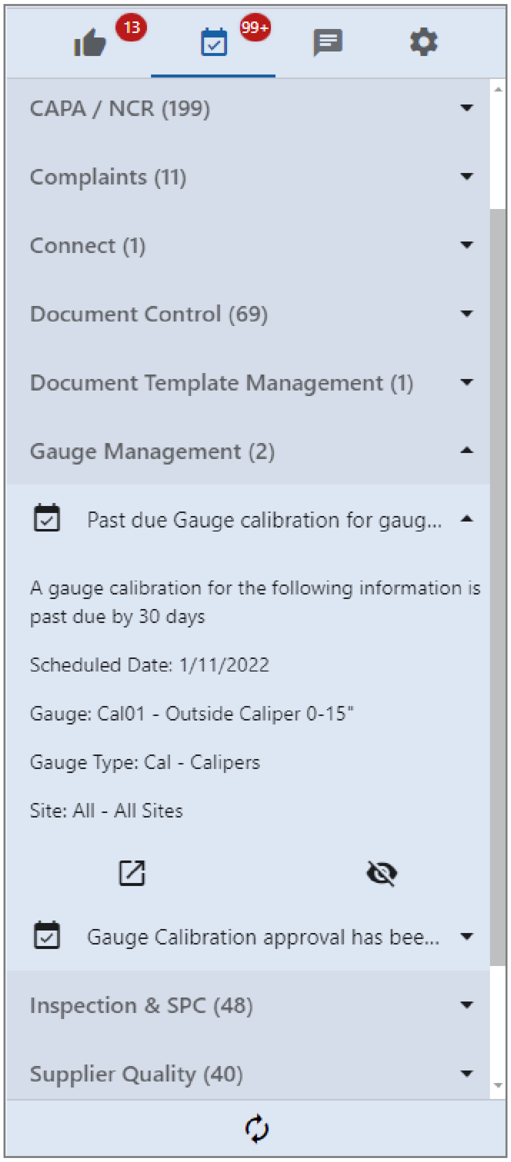
An acknowledgeable inbox action item notifies you that something has occurred within a process, such as the completion of an internal audit. To remove an assignment inbox action item from your list, you must acknowledge you have seen the item. The acknowledgment is then recorded in the item's audit trail for future reference.

Sometimes an assignment inbox action item may require more than just acknowledgment. For example, if a record requires disposal, then the notification will request that you open the record in order to change its state to Disposed.

An assignment inbox action item is typically composed of the following areas:

- A check box icon, which is displayed in color if the item is unread.
- The subject of the action.
- The action body.
- An Open option, which opens the detail record for the action.
- A Mark As Read option, which indicates that you have read the action item.

Fig. 32: Assignment Action Manager Item



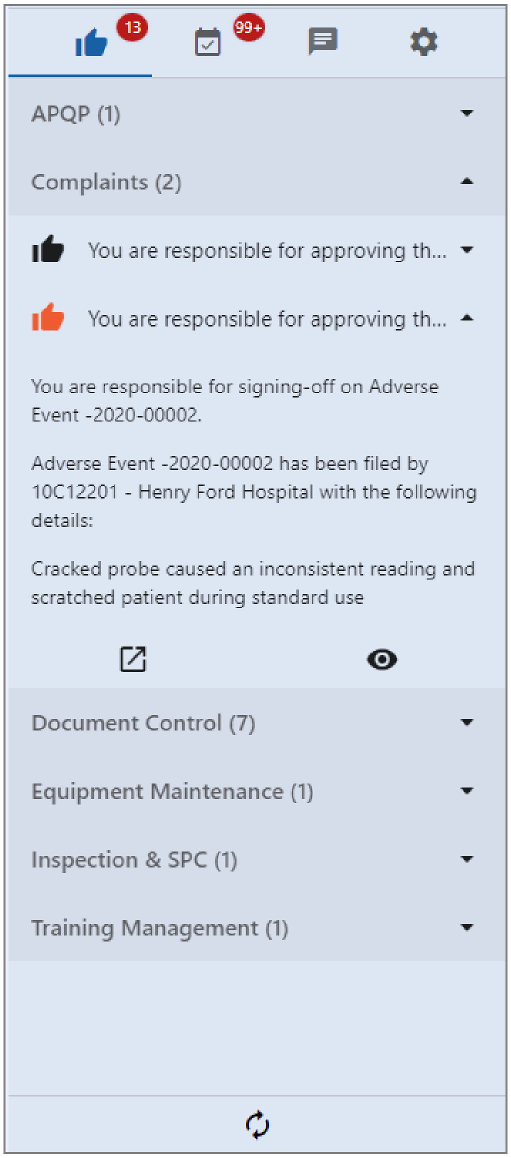
Approval Inbox Action Item

An approval inbox action item requires you to approve or reject the item to complete the approval process, which will remove the item from your Inbox.

As shown in *Fig. 33: Approval Action Manager Item*, an approval Action Manager item is composed of the following areas:

- The thumbs up icon, which is displayed in color if the item is unread.
- The subject of the action.
- The action body.
- An Open option, which opens the detail record for the action.
- A Mark As Read option, which indicates you have read the inbox action item.

Fig. 33: Approval Action Manager Item



Chapter 6

Reporting

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Reporting Basics

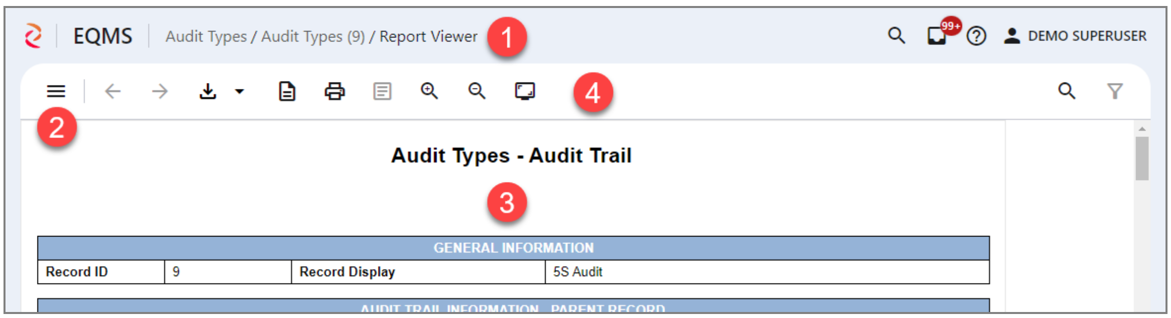
You can choose to download a report from the search and detail screens. These reports can be previewed and accessed from both pages.

Reports can be exported to several different sources, including but not limited to:

- Acrobat (PDF) file
- Excel (97-2003 or Worksheet)
- PowerPoint Presentation
- Rich Text Format
- Word Document

Reports are not available as gadgets due to the amount of information being pulled.

Fig. 34: Report Viewer

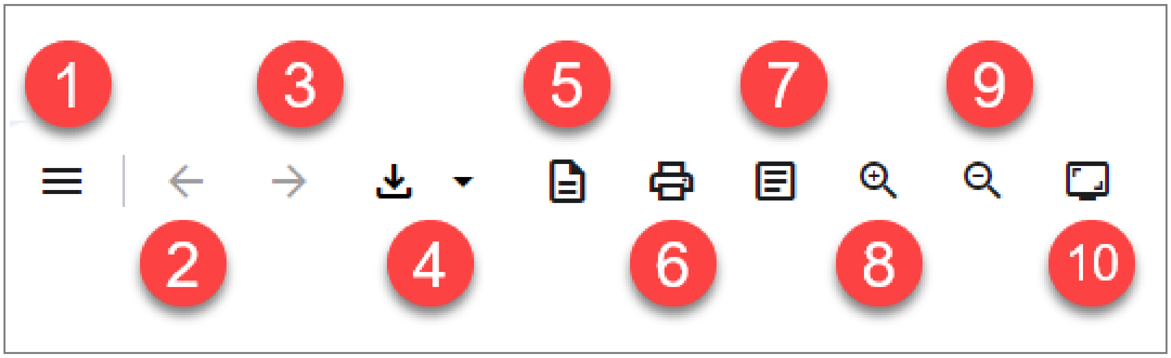


The report viewer layout for the search and detail screens is essentially the same. The list of available reports is on the left, with a large preview area on the right.

1. The breadcrumb shows the name of the process from which the report viewer was opened. You can click this link to go back.
2. The list of reports for the current process.
3. The report preview area. After selecting a report in the list, a preview of the report displays here.
4. The toolbar allows you to download the report, zoom in and out, export the report, and more.

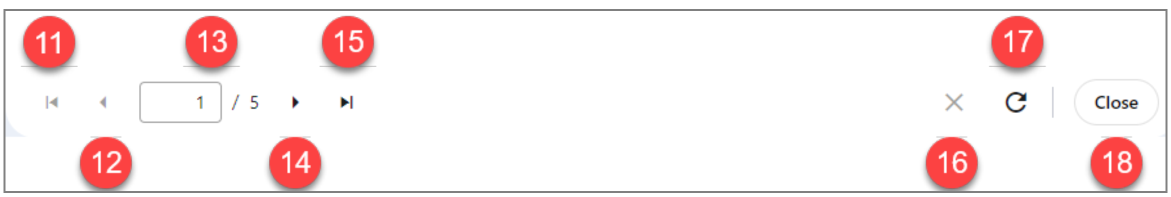
Reporting Toolbar

Fig. 35: Top Reporting Toolbar



1. Reports List
2. Previous Report
3. Next Report
4. Export
5. Toggle Print Preview
6. Print
7. Document Map
8. Zoom In
9. Zoom Out
10. Full Page / Full Width

Fig. 36: Bottom Reporting Toolbar

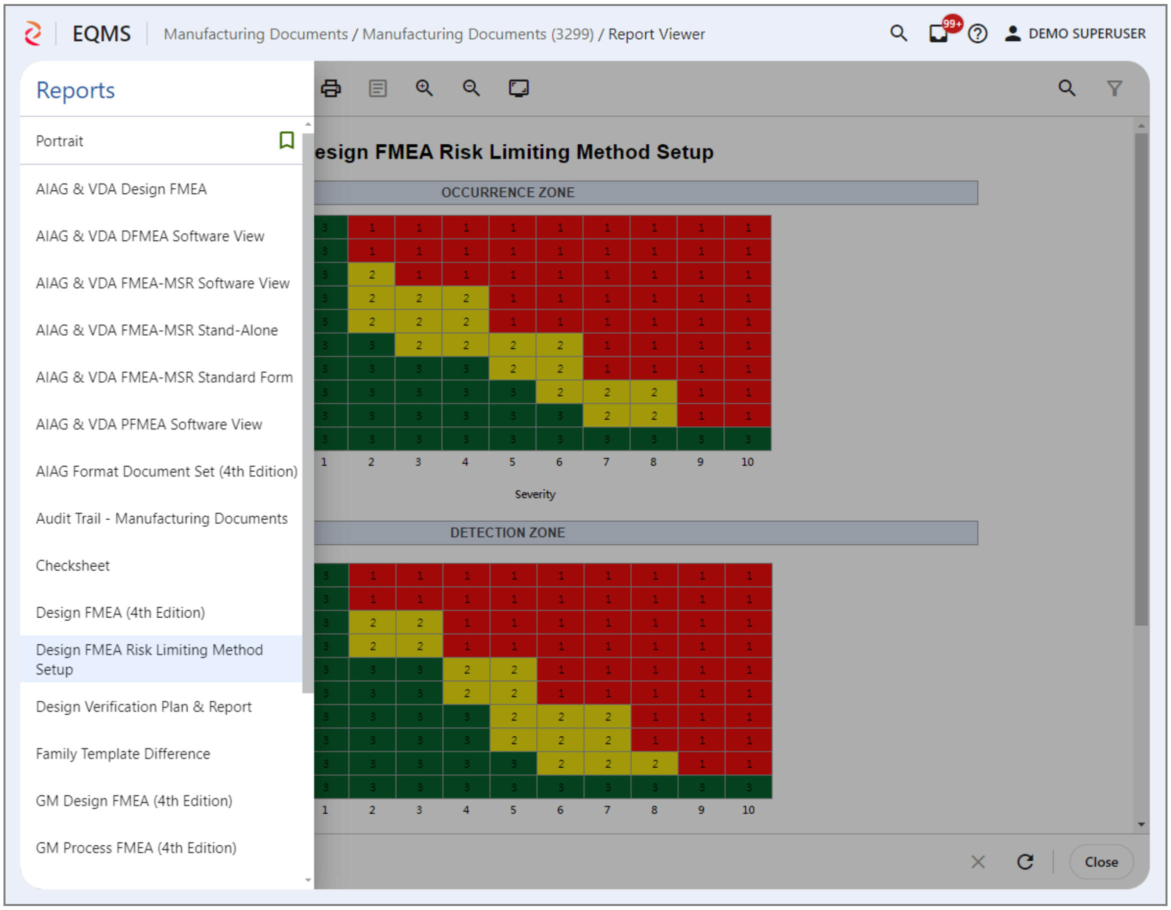


11. First Page
12. Previous Page
13. Page Navigator
14. Next Page
15. Last Page
16. Cancel Rendering
17. Refresh
18. Close the Report

Reporting Interface

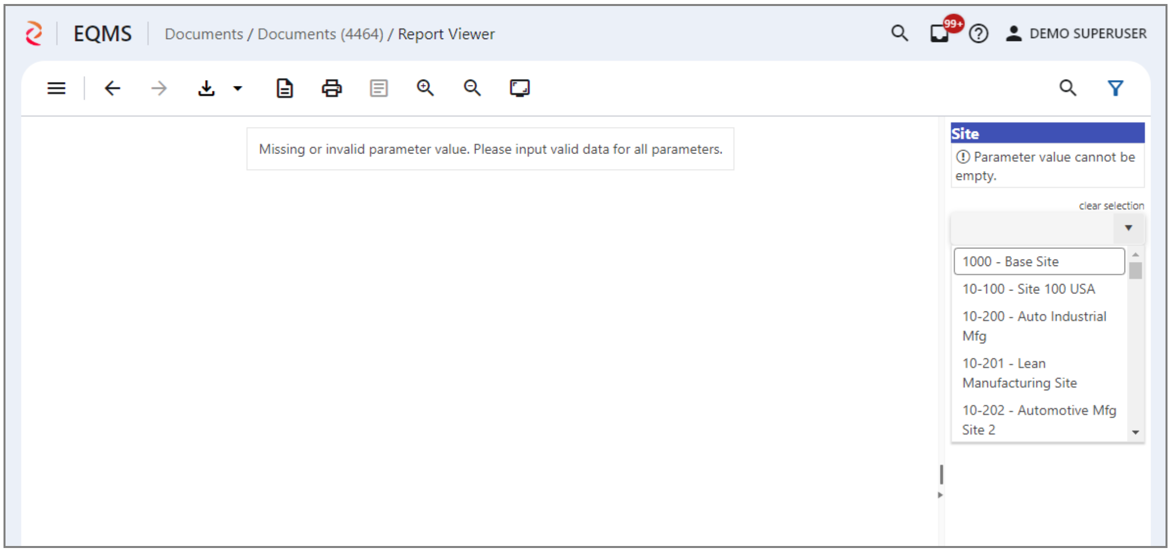
The reporting interface from the Search or Detail screen allows you to print any reports that have been set up for the process.

Fig. 37: Report Viewer screen



Certain reports require additional parameters in order to be previewed. The parameters are listed on the right side of the preview window. If a report requires parameters, then this pane will automatically appear.

Fig. 38: Reporting Parameters



After you fill in the additional parameters, click the Preview button to see the report preview.

Chapter 7

Dashboard Gadgets

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Gadget Types...51

Gadget Basics

Dashboard Gadgets are software tools made available to you, which are placed and customized on one of your Dashboards. Many gadget features are consistent regardless of the type of gadget. When you click the Design Mode icon at the bottom right of the dashboard screen, you can add, remove, re-size, and edit gadgets.

All gadgets can be moved and re-sized, and most can be expanded to fill the screen. They do have a minimum size requirement, and will snap back to the minimum size if you attempt to make it smaller. To remove a gadget, simply click the trash icon in the bottom right corner of the gadget, which appears when the dashboard is in design mode.

Each gadget can be in one of three modes: Setup, View, or Add.

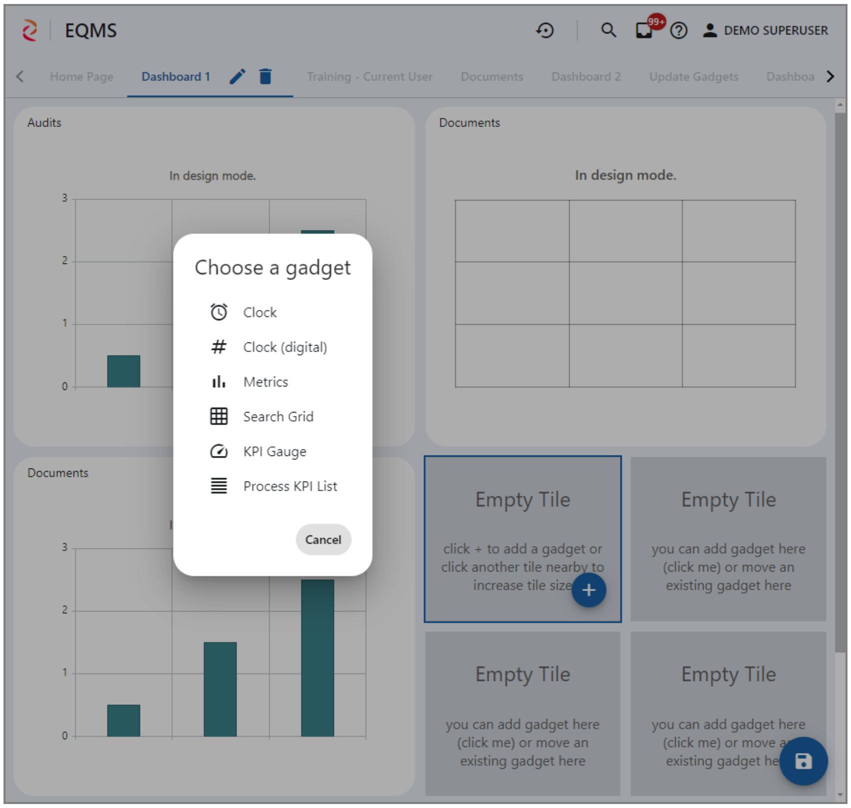
- **Setup mode.** Modify the options available for a particular gadget type. Click the gear icon at the bottom of the gadget the dashboard is in design mode to enter the setup screen.
- **View mode.** View the gadget on the dashboard in the format defined in Setup mode. This is the default mode for gadgets that have already been created.
- **Add mode.** Opens a new detail screen for the Process that the gadget represents. For example, if the gadget is a grid, list, or gauge for data in the Documents process, then the Add mode will open a window to create a new document. Click the plus icon at the top of the gadget to enter this mode.

Adding a New Gadget

When in design mode, the basic method of adding gadgets to your dashboard is to click the large circular plus button in the lower-right corner of an empty tile. This will present you with a list of dashboard gadget types to select from, as seen below in *Fig. 39: Choose a gadget*.

A new dashboard gadget can also be added by dragging a process from the Navigation menu to the dashboard. After the drag and drop is complete, you will be presented with a shortened list of dashboard gadget types you can create.

Fig. 39: Choose a gadget



- **Gadget Type List.** Click the type of gadget you would like to create.
- **Cancel.** Click the cancel button to cancel the creation of a new gadget on your dashboard.

Select the type of gadget you would like to create; a new window will appear.

> ***Note:*** If the gadget is being added from the Add Gadget button, you must select a process. Keep in mind that some processes do not contain any metrics.

You will be asked to set up the gadget settings, which differ depending on which gadget you select. These options are fairly intuitive, such as choosing a grid type, a filter, and so on. See *Gadget Types* on page 51 for further information. Once you have chosen the appropriate gadget settings, click Save.

Gadget Types

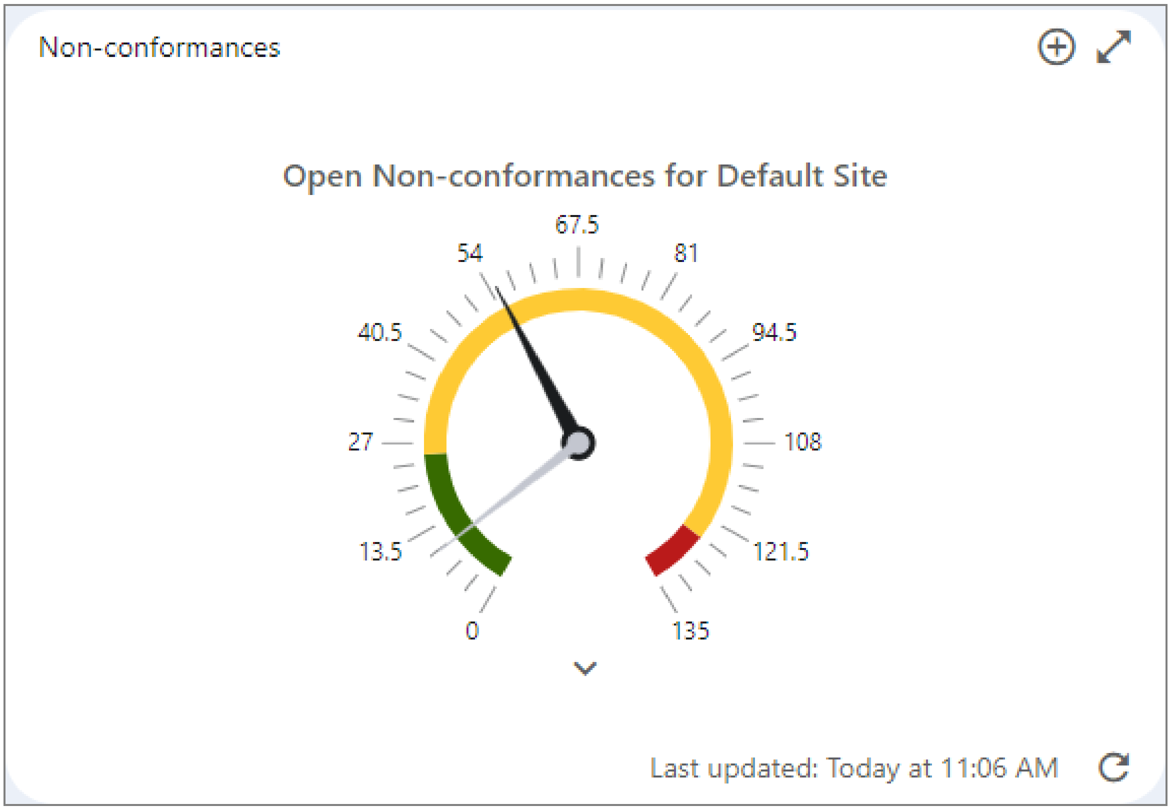
There are six gadget types: Clock, Clock (digital), KPI Gauge, Process KPI List, Metrics, and Search Grid.

KPI Gauge

KPI (Key Performance Indicator) gauges allow users to observe the metrics of a single process. They contain three customizable ranges, or targets, of color and an arrow to indicate the current value. The targets, which are unique to KPIs, are as follows:

- **Green.** The range considered to be ideal.
- **Yellow.** The range considered acceptable, but not ideal.
- **Red.** The range considered unacceptable.

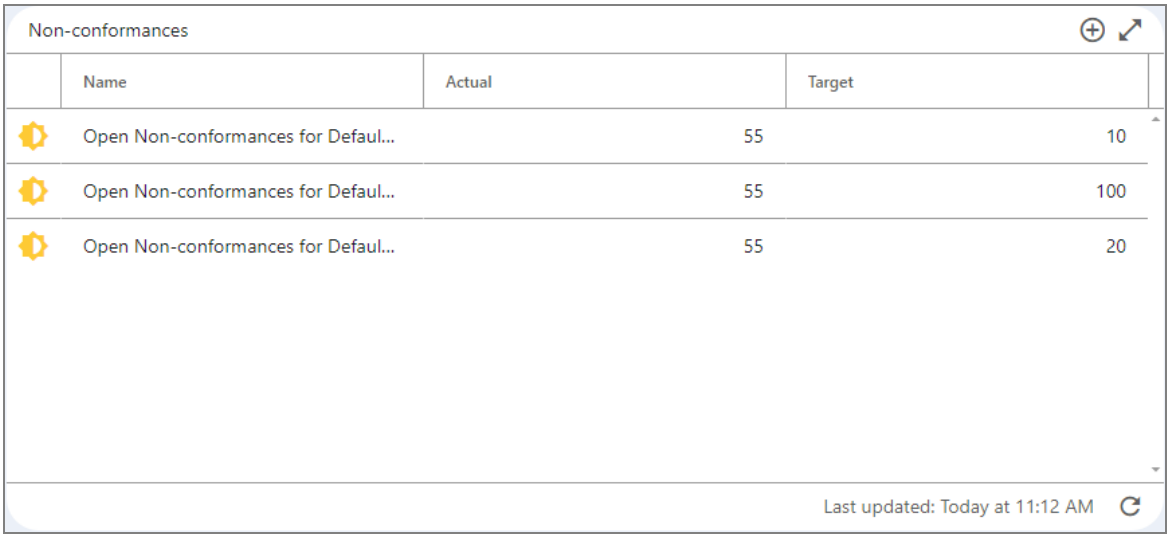
Fig. 40: KPI Gauge



KPI List

KPI (Key Performance Indicator) Lists allow users to track multiple KPI metrics for a single process. Similar to the gauge, KPI Lists can indicate how ideal the current values of the metrics are according to red, yellow, and green targets. For each KPI listed, the actual values are compared to the target values.

Fig. 41: KPI List



Non-conformances

	Name	Actual	Target
	Open Non-conformances for Defaul...	55	10
	Open Non-conformances for Defaul...	55	100
	Open Non-conformances for Defaul...	55	20

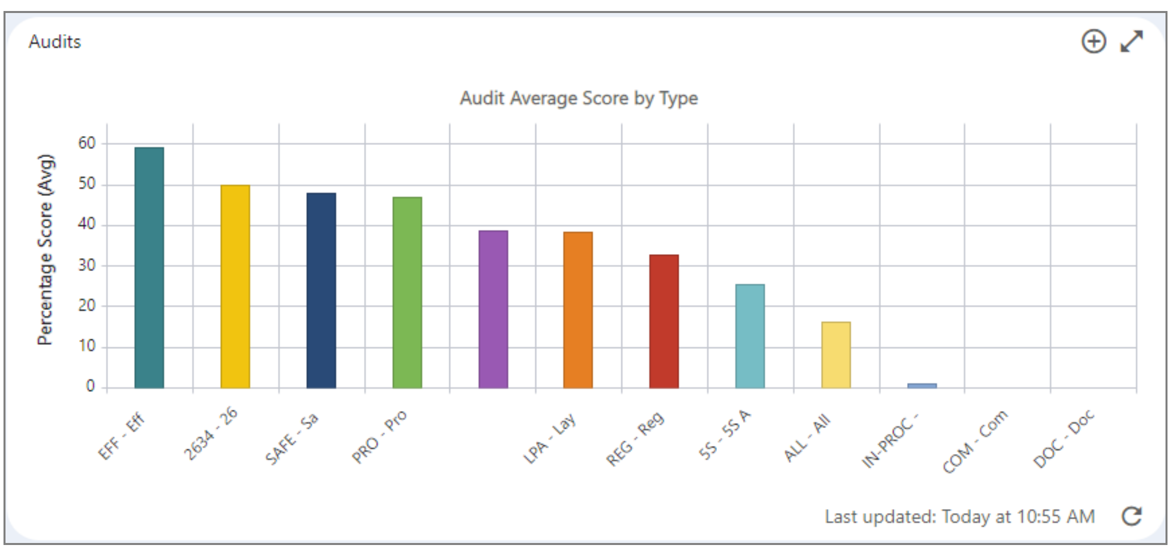
Metrics

Metric gadgets can display column, line, or pie charts. Depending on which chart type is selected, a drop-down list appears, which contains the metrics developed for the selected process. If a filter is already developed for this process, then it can be selected to limit the data shown.

When setting up a column-style gadget, you can select the "Add Pareto series" check box to add a Pareto line, which tracks the cumulative value total.

To view more information on the metrics shown on the chart, you can select a metric to drill down to the source.

Fig. 42: Metrics Gadget

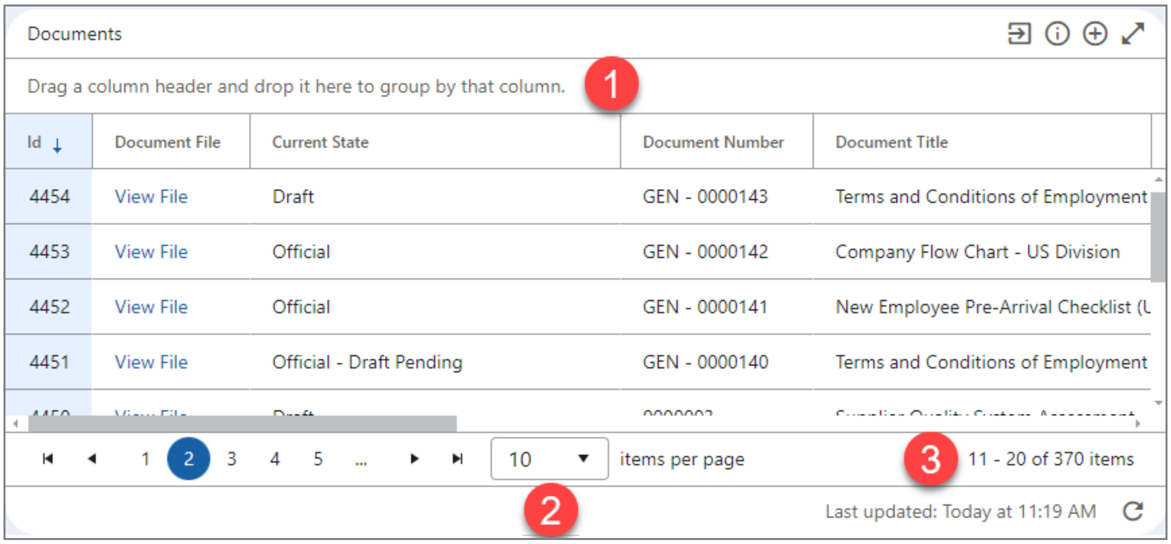


Search Grid

The Search Grid gadget is a window to a process' Search screen. The columns and data that display are the same as the default columns that display for the Search screen. You can add an admin or user filter, if applicable, to limit the data for the grid. You can also select a layout for the Search Grid. Double-click an item to drill down to its Detail screen.

In the gadget's Setup mode, you can select grid settings that you want to see on the Search screen. These settings are minimal and are optional for purely aesthetic reasons. See *Fig. 43: Grid Settings* below to view where each grid setting displays when enabled.

Fig. 43: Grid Settings



1. **Show group bar.** Enables the drag-and-drop grouping bar.
2. **Show page-size selector.** Enables the selector that allows you to choose how many items to show per page.
3. **Show page info.** Displays how many items are on the page out of how many items are available in total.