

## Using Continuous Improvement Tools Ensures the Road to Success!



CIS is outside the box...



**CIS Continuous Improvement Software**  
**A Standard of Excellence**  
**For Continuous Improvement**  
**and True Paperless Management**

*Edition 2020: March 1, 2020*

Revision 2020 ➤ On the road towards Excellence!

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# Continuous Improvement Software

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## Overview

We would like to take this opportunity to thank you for choosing CIS– Continuous Improvement Software. TQMS Inc. has worked hard to create one of the world’s most useful total management software programs that will serve you for years. We welcome comments and we are always looking for new ideas to make our software more useful to our clients.

CIS is a totally web-based integrated solution to automate all of your quality requirements and to ensure that proper follow-up is consistently achieved in order to ensure results. However, version 2020 is now available for loading on a company server when required for extra unique security requirements.

**Help and manuals in CIS are now built into a HELP Tab in CIS at the far right. However, our help videos and help manuals can only aid with CIS as delivered to you at the beginning. Please note that as you modify CIS to meet your needs, our training videos may become less and less effective. For example, we may be demonstrating the Nonconformity App and we would select the App under quality data menu when you may have moved the Nonconformity App to the Top Menu and Re-Named it to Error Reporting. Additionally, you may have renamed some fields, deleted others and added some of your own unique fields. Therefore, when a user watches our training video, they must understand the changes. Most of the functionality will be similar and therefore the videos will still be somewhat useful.**

In the new CIS, you may add your own help comments in all the Input forms by fields and you also have your own FAQ page to further help your users.

## New features with the CIS 2020 Version:

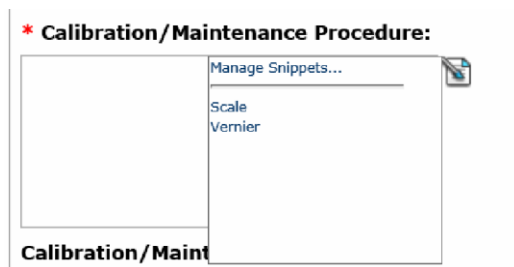
- Supplier Approval Portal and process to add supplier automatically to the user’s table
- Customer Survey Portal
- Lessons Learned Library automatically populated from NCR, Near Miss, Customer Feedback and Corrective Action
- Complete Process Auditing Solution, linked Action Items per audit and Audit Status Report
- Employee Authority Matrix Reports
- Employee Competency Verification Matrix
- Modules now referred to as individual Apps
- Titles added to all Reporting Apps
- Accident and Incident Reporting App in accordance with OSHA
- Risk and Performance App
- Food Safety HACCP App
- New HELP Menus
- New Calibration and Maintenance Print Report listing all Instruments due for calibration
- New Calibration/Maintenance Sticker Print Report
- New link from maintenance to products and hourly rate calculations for Maintenance Costs
- New 5-Why problem solving in Audit Actions and Corrective Actions Apps

## Snippets

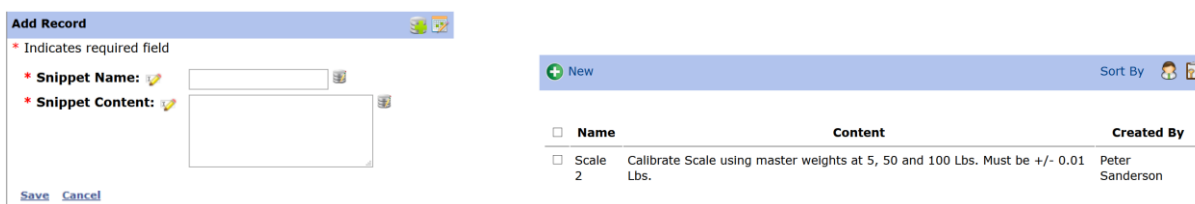
Snippets help employees to enter data into memo fields that are repetitive and may require certain information be entered in a memo field consistently. Snippets work the same as copy and paste. Once a snippet is created, it may be selected, and the complete snippet will insert into the memo field.

For example, the following demonstrates how to create a snippet of a Calibration Procedure that occurs frequently:

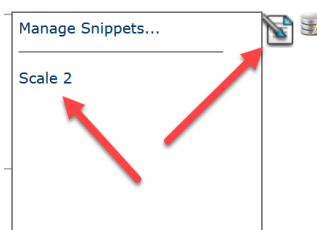
**Step One:** When entering the Calibration and you are about to enter the procedure, place your cursor over the snippet icon:



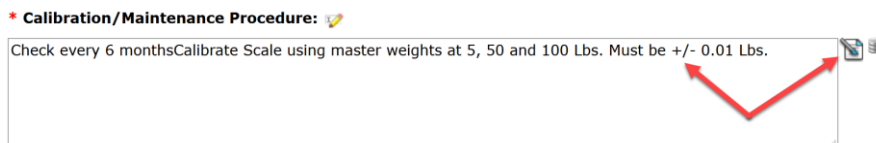
**Step 2:** Select Manage snippets. Select NEW and give your snippet a name and then type in the snippet content field what you want to be entered each time in the memo field and when complete, save.



**Step 3:** Once the snippet is saved, all employees may access the snippet by holding the cursor over the snippet icon, then by scrolling down to the snippet they require and selecting it:



**Step 4:** Once selected, the snippet is instantly inserted into the field:



Snippets can be created for a variety of purposes. For example, if a receiving inspection of a certain type of damage requires specific information each time, a snippet can be created to act like a form. When selected, the snippet will be inserted and the employee may then enter the specific information. See the snippet below:

Received Boxes Damaged:

Box Type:

Qty:

Transport:

Qty Boxes required to re-pack:

Qty Recouped:

Once the snippet is inserted, the employee may complete the entry by entering only the required information.

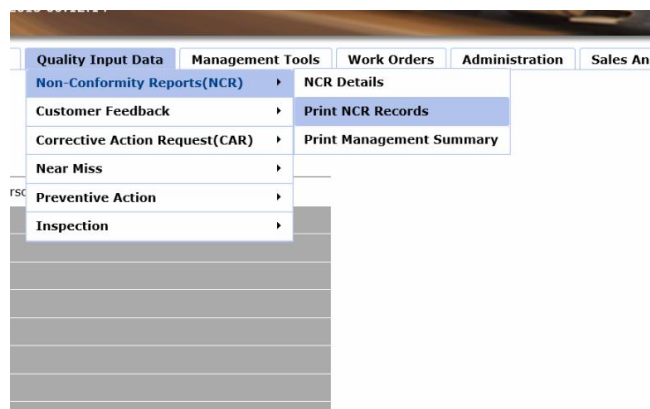
Another example of snippets is to have standard information available. For example, in the Work Order App, under material, a snippet could be created to have the price of materials:

Snippet	Entry after Snippet is Used Employee enters quantity used only
Shrink Wrap/Pallet: \$ 20.00 Pallet: \$ 6.00 Box Size 2: \$ 1.00 Box Size 3: \$ 1.100	3x Shrink Wrap/Pallet: \$ 20.00 3 x Pallet: \$ 6.00 3 x Box Size 2: \$ 1.00 0 x Box Size 3: \$ 1.100

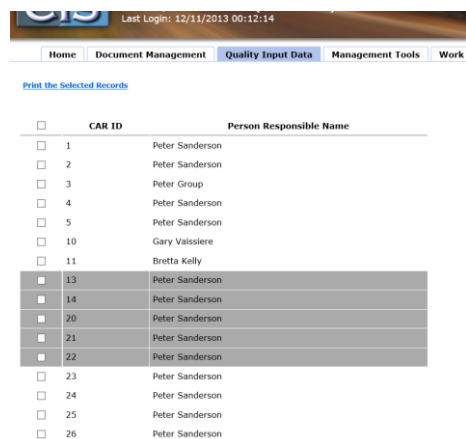
By having the prices as above, the employee may calculate and enter the total cost of material used in the material cost field.

## Printing

All information in CIS may be printed. The printing option is within each App and will be displayed selected.



Once selected, a print screen will be displayed, and you may select the records you would like printed.



**Notes for Administrator:** The print selection is a “Page” in CIS and therefore has an associated User Control. In the User Control, you may reverse the order the print records are displayed since often you may want the most current on top to select from. This is true for all Apps and displays. Example Below:

## **System Set-Up (Only administrators have access to this App)**

### **Administration/User Management**

#### **Users and User Types Overview**

In the 2020 CIS user access and permissions are controlled by User Types that can be created and then selected on each page in CIS under administration/site management/pages. The permissions to add, edit or delete records are selected under the User Control for that Page under Administration/Site Management/User Controls. All of this is covered later in this chapter. When starting with CIS Software it is best to have a look around at all the Apps and try to decide what groups of employees should have access to these Apps. For example, you may want the Executive Managers to have access to all Apps yet the Laboratory Inspectors having access to only three or four Apps. CIS allows for this targeted control, but it is important that you decide the different groups and then create these User Types such as Executive Managers, Laboratory Inspectors, HR Level One, HR Level Two and so on.

This step is critically important and should be one of the first items planned in your CIS Set-up. The reason is that each page needs to have the User Types Access Selected and there are many pages in CIS. Therefore, it is desirable to perform this selection process once at the beginning and not multiple times as you add or combine User Types.

#### **Adding a new User Type**

Click on Administration/User Management/User Types

Click +New and then enter the name of the new user. The landing page may also be selected. The landing page is the page the user will see when they log in. Generally, it should be the home page and it should be entered as /admin/home. However, if for example you wanted the new user to see a specific page, you would enter the page as follows:

/admin/”Page Name” (see administration/site management/pages to find out the exact name of the page you desire)

**Note to Administrator:** Working with two screens offers the ability to open the page that you want to land on and then copying the last part of the page name including the /admin/... so that it may be pasted into the Landing Page Field.

## Adding Users

Users are any person, company, customer, subcontractor or supplier that will be in your CIS system either as a selectable user for reporting and/or to have actual working access to your CIS System. For example, a supplier must be added as a user before you can select the supplier for supplier approval in the Vendors' App. Likewise, a customer must be a user before they can be selected in a NCR Record or Inspection Record.

Administration	HELP	Logout
User Management		User Types
Criteria		Users
Preferences		Import Users
HR Settings		
Personalized Home		
Website		
BackUp		
Site Management		

**Notes for Administrator:** When setting CIS up for the first time, contact your consultant who can help import all the users for you including customers, suppliers and employees. However, when the employees are imported, they are all imported as a Manager User Type and CIS will assign a Username and Password. You may then edit the User and assign the proper User Type, Username and passwords if you prefer.

To add users, you must access the administration App then select “users”:

Once you select user, you may then select “+New” to add a user, you will be presented with the add/edit user input screen to be completed. See the following sections for information on access and permissions.

**Add User**

\* Indicates required field

User ID: New User

\* Name:

\* User Name:

\* Password:

\* Email Address:

User Type: Administrator

Allow To Edit CAR Due Date:

Panel Access:

- Non-Conformity Reports
- Customer Feedback
- Corrective Action Requests
- Objectives
- Charts
- Inspection
- Meetings/Audits
- Calibration
- Vendor/Supplier Management

View >

View & Add >

View, Add & Edit >

View, Add, Edit & Delete >

< Remove

Document Permission:

- ☐ Add Documentation
- ☐ Edit Documentation
- ☐ Move Documentation
- ☐ Copy Documentation
- ☐ Delete Documentation

Documentation Access:

- ☐ Customer Documents
- ☐ Engineering Drawings
- ☐ Management Procedures
- ☐ Safety
- ☐ Wilson Audits

Title:

Department:

Address:

Address2:

City:

Each User Type and/or key employees that will have access to CIS should be entered into CIS. Customers and Suppliers should also be entered even if you are not intending to grant them access. They need to be entered as a User in order to be selectable on the applicable Apps.

**Note to Administrator:** However, customers, suppliers and employees may be imported by your consultant or reseller. The import process MUST follow a specific order of events as described below.

Importing must be done in a specific order. For example, in the vendor approval import, the table requires the manager who approved the vendor. This is the manager's user ID number acquired from the users table. Therefore, the applicable manager must exist first. When importing training, there is also a responsible manager.

- Customers into the users table
- Suppliers (not approved) into the users table
- Suppliers Approved including method and service/product into the users table and into the Vendor App
- Managers into the users table
- Administrators into the users table
- Employees into the users table
- Employees Imported into the Training App
- Employees and their past training records into the training App

**Note:** When CIS imports new managers, customers etc. into the user table, it does not establish the settings such as the Apps they can access and permissions since these must be determined individually by you. Therefore, you still will need to edit the records and establish the details within. Furthermore, CIS will establish a username and password that you may wish to change afterwards.

## **Name and Password**

Enter the name of the employee as you want the name to be displayed in a drop-down selectable list in the individual Apps. The names are presented alphabetically so with employees you must decide on if you want them first name order or last name.

Peter Sanderson *or* Sanderson, Peter

Once decided, remember to be consistent. This would be true of the import data supplied on start-up. With customer, this may apply as well.

We recommend the use of strong passwords.

The passwords below are examples that follow some of the published guidelines for strong passwords. But note carefully that, since these example passwords have been published, they should never be used as real passwords.

- *4pRte!ai@3* – mixes uppercase, lowercase, numbers, and punctuation (evidence there is a large character set), increasing an attacker's work factor
- *Tp4tci2s4U2g!* – built from a phrase that a user can memorize: "The password for (4) this computer is too (2) strong for you to (4U2) guess!" — mixes types of character. If the phrase is not 'well-known', this password should have high entropy for an attacker, and be easier to remember than many passwords
- *BBslwys90!* – loosely based on a phrase that a user might memorize: "Big Brother is always right (right angle = 90°)!" – mixes character classes
- *tDI"60Hs7Q* – characters selected from two poetry stanzas by different methods from a page selected using an honest [die](#). But likely to be hard to memorize
- *152@36291QB\$* – the serial number of a US currency bill with added elements (which should be random, e.g. chosen via the honest die mentioned above). The bill and its serial number are likely to be hard to connect to the user and so will have high entropy to an attacker. Note that some currency may use predictable serial numbers



(e.g., adding check digits, padding, type codes and the like, often covertly) and, if so, will have less entropy than visibly suggested

When you have completed, click save user. A confirmation should appear. If no confirmation appears, it is possible that the username entered is already being used on the server. In this case, you must choose another username.

**WARNING:** Be certain that employees who should not have access to the HR employee confidential information, the Sales and Marketing price quotes and the Corporate Mail (access to everyone's mail) do not have user access to these Apps.

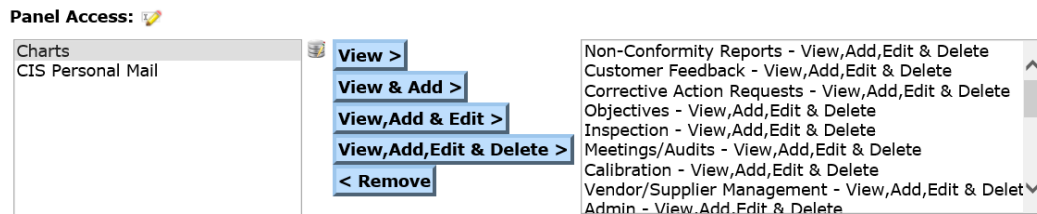
## User Access

The Administrator may determine for each user which panels they should have specific access to when setting users (see next section setting users).

***BIG WARNING:*** In CIS 2020 (unlike the original version of CIS) the access and permissions are controlled by User Type and then Page Access and User Control Permissions. This is the preferred method for controlling security. If you use this Panel Access, it OVERRULES access and permissions you set for that user type in the pages and user controls. The right side of the panel **MUST** be BLANK for our standard User Control and Page Access security system to work for that user.

*However, we understand that there are always exceptions and we therefore have decided to leave the Panel Access settings in the user setting for each user. This will allow you to assign a unique set of access and permissions to one user at a time. Perhaps the user does not fall into your current User Types and Page access and instead of adding the new User Type for one employee and then revising each page and user control, you can use this panel access.*

There are standard user types and each user type has a unique set of permissions. Therefore, if you want the user type standard permissions, you should not select anything in the permissions panel access. If you want permissions different from the standard such as giving a user permission to edit a record in a specific panel then you may. Additionally, they can select for each panel the permission such as: view only, view and add a record, view, add and edit or view, add, edit and delete. TAKE CARE TO NOT USE THE DELETE PERMISSION UNLESS THE MANAGER ABSOLUTELY REQUIRES THIS PERMISSION. To select the panel and permission, simply select the panel on the left table then select the permission. You must add one panel at a time. You may also set up other administrators with limited access to administration Apps. For example, you could have an administrator responsible for the HR Settings in HR and they would only have access to the HR settings and not user tables or other administration Apps. Likewise, you could also have another administrator responsible for news and so on...



**Note to Administrator:** CIS provides far more specific permission and page options that can be initiated by creating a new user type and then giving the new user type permissions on each page in site management. Please refer to Programming section.

## Setting Users

In CIS the user's permissions are set automatically when adding a user type. Remember customers, suppliers and employees may be imported by your consultant or reseller.

**Note:** CIS provides far more specific permission and page options that can be initiated by creating a new user type and then giving the new user type permissions on each page in site management. Please refer to Page User Permissions.

There are five **standard levels** of users that are set globally throughout the system as received (default) are as follows. Therefore, if you add a user and do not select any specific permissions, then the following will apply. If you select permissions specific to an employee, then those permissions will override the standard page permissions.

However, you may have many other User Types custom added by your administrator.

Administrator: The administrator has the rights to add, edit and modify all features of the database system. This includes adding new criteria, adding new members and deleting records and controlling what panels each user will be able to access.



Manager: The Managers have the rights to edit records and complete Customer Feedbacks, Corrective Actions and Non-Conformity reports but can be assigned these actions specifically by App (see user access above). They also are the people that are responsible to resolve Corrective Action requests. In fact, once the Managers are set-up, they will be automatically advised by e-mail of each Corrective Action request immediately after it is saved into the system and they will be reminded if the Corrective Action is not resolved in a predetermined time frame. They may also view the charts (statistics). In addition, Managers may be given permission to edit CAR Due Dates which allows a manager to change the default Corrective Action Due Date. CIS (see Preferences) has a set-standard due date when CARs should be resolved and will consider CARs late if they pass the allowed set-standard time allowed. However, if a Manager is given permission to edit these due dates, that Manager may change the due date and CIS will only report the CARs late on the revised due date.

**Note to Administrator:** Do not confuse Manager in CIS with actual titles in your organization. The standard Manager in CIS is a person who has access to the Apps and permission to Add and Edit records.

User: The users can enter new Non-Conformity, Corrective Action requests and Customer Feedbacks. They may also view the charts (statistics).

Customer: Customers must be entered as users in order for the Apps to function. You require at least one customer in order for many of the CIS Apps to work. The customer's representative responsible to provide instructions on what to do when material is rejected should be entered with their name and e-mail address. This will allow the CIS to automatically advise the customer by e-mail when damaged or rejected product is received (See Inspection). Customers may have access to the system if you choose to supply them with their username and password. You may give each individual customer specific access to the Apps that you want them to see as well as permissions to view only, add records or add and edit records. This allows a customer to add his or her own Customer Feedback or to add a work order directly into your CIS Management System. Additionally, a customer may access his or her own inspection results directly by logging into your own CIS System.

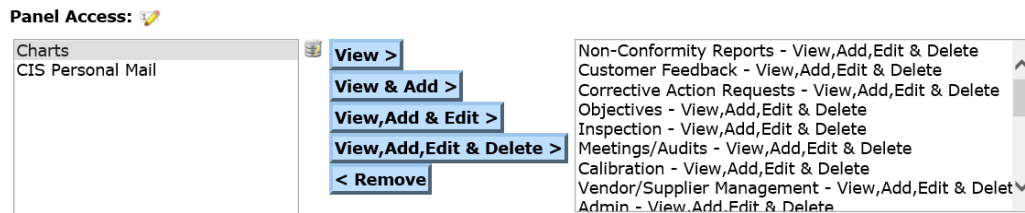
**Note to Administrator:** When a customer or Supplier logs into your CIS System, they will only have access to view, edit, or add records that are associated with their company name. They cannot see or have access to your other customers' or suppliers' information or any other information that is not directly associated with their company name.

**Warning:** The above only applies to the standard Apps that suppliers and customers have been coded to as received in CIS. This would not be the case for new Apps that you create without having our

programmers limit the record view to see only their records. Contact your consultant for more information.

To provide the access and permissions you must select customer when setting up the user and a permissions/access screen will appear:

Simply select the App from the left panel that you wish to give access then click the permission box:



- View – Allows Customer to View their records only in the Selected App
- View & Add – Allows Customer to View their records only and add new records in the Selected App
- View, Add & Edit – Allows Customer to View their records only, add new records and edit existing records in the Selected App
- Remove – Removes the customer's access from the selected App (Must select the App that is in the right panel)

Suppliers: Suppliers must be entered as a user first to be selected from the supplier list in the Vendor/Supplier Management section for approved vendors. Suppliers/vendors may also be given specific access and permissions to your system. These permissions are given in the same manner as customers (see above).

Subcontractor: The subcontractor is designed to be used by subcontractors who require access to the special requirements, Non-Conformity, Corrective Action, near miss, receiving inspection, help and statistics. However, you may limit this access to only one or more of these sections.

Therefore, the first set-up function for the Administrator is to go to the user's section and add all the users unless they were imported for you by your consultant. You must complete all the information including their e-mail address. This will enable the automatic e-mail notifications to be sent by the CIS. CIS verifies that the e-mail address is a valid e-mail address.

Warning: Records will not be accepted and saved if the following occurs:

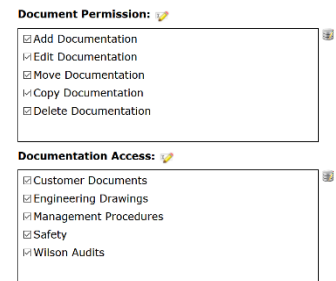
- Email address is not valid, or
- Username is already taken on our server. Duplicate usernames are not allowed. Therefore, common names such as John, Peter and Julie are most likely taken

**NOTE:** The login name may not have any spaces between the names. We suggest you use the first letter of the first name followed by the last name. Also, since this is on a windows server, it is possible that many popular names have been taken such as Peter, John, etc.... In this case, be creative.

## User Access and Permission for Documentation

In addition to deciding on which Apps a user may access to, you may also decide on which documentation folder the user may see (have access to) when they login and what permissions they have in the folders.

**Note to Administrator:** The document folders displayed are only the folders that have been created. As you create new folders in the documentation system you will be given the option to have the folder access to all or no one so that you can decide to provide access on a user-by-user basis.



**Document Permission:** ✓

- ☒ Add Documentation
- ☒ Edit Documentation
- ☒ Move Documentation
- ☒ Copy Documentation
- ☒ Delete Documentation

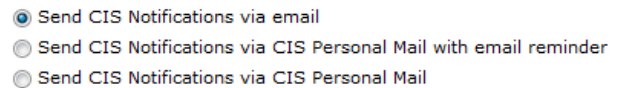
**Documentation Access:** ✓

- ☒ Customer Documents
- ☒ Engineering Drawings
- ☒ Management Procedures
- ☒ Safety
- ☒ Wilson Audits

## User Communication Settings

When setting up the users, you may also select how CIS will communicate and send out important notifications such as advising managers of Corrective Actions that are due, meetings that are planned or other CIS notifications. There are three choices at the bottom of the user screen:

1. All communications are sent to the user's e-mail address
2. All communications are sent to the user's CIS Personal Mail with a separate e-mail sent to the user advising them that they have CIS mail. The user will be required to login to CIS to read the message
3. All communications are sent directly to the user's CIS personal mail with no additional e-mail notification



☒ Send CIS Notifications via email

☐ Send CIS Notifications via CIS Personal Mail with email reminder

☐ Send CIS Notifications via CIS Personal Mail

## Page Global User Permissions

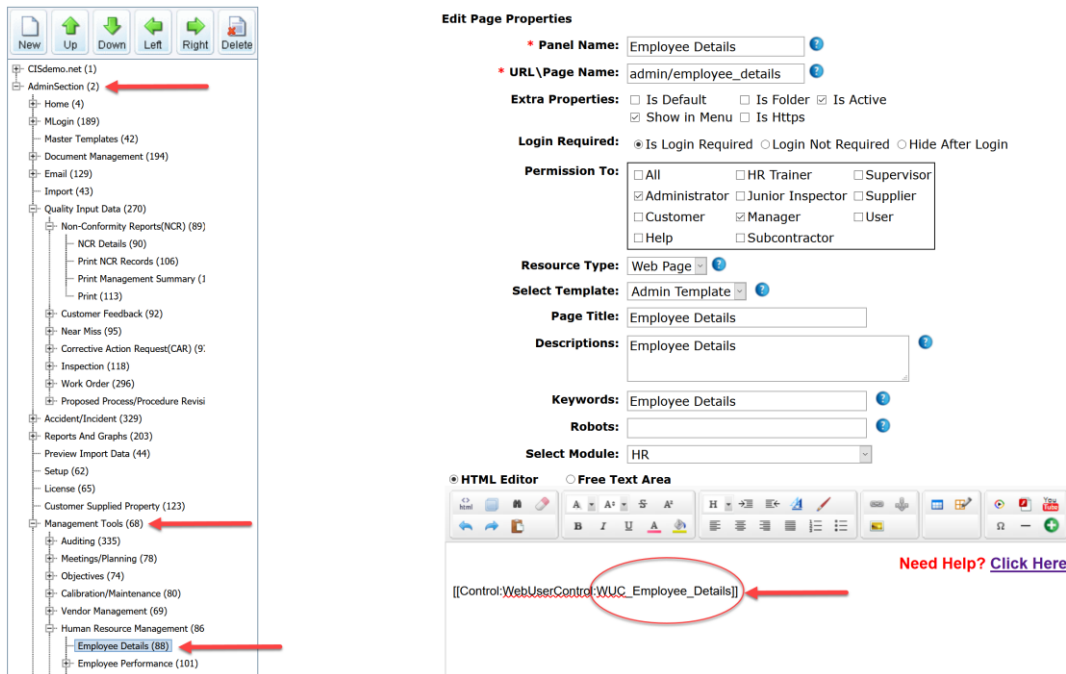
CIS allows us to set user permissions on each page globally throughout the system and if required we can add new types of users to better control access. For example, we can add a user called HR Manager and on the HR Employee page we can only allow the HR Manager access and no other managers.

## Revising or adding Global Access and Permissions per User Type

Click on Administration/Site Management/Pages. Once there, expand the AdminSection(2) that will display the pages and the menu system. Please refer to Menu Design to learn how to move pages and create unique menus for your organization.

**Note to Administrator:** When selecting User Types Access, you cannot have ALL selected while having another User Type Selected on the same page since this makes no sense and will result in no User Type having Access. Therefore, you must deselect All when selecting other user types. Also, if you give access to a user Type on a page, they must also have access to the top folder and sub folder pages.

From the expanded list of pages and menu Apps, you may then expand each menu such as management tools to drill down to the specific page that you wish to set or modify permissions. In the following example, we have drilled down to the Human Resource Management and have selected the page “Employee Details”. Then click once on the employee details page to bring up the page properties to edit. Since we have added a user type named HR Manager, we have selected that only the Administrator and HR Manager will have permission to this page.



Once we have selected the user type access, we must then set the actual permissions (add, edit, delete) for that user type on the user controls. To do this we should first scroll down and take note of the WebUserControl assigned to the specific page. In this example it is “WUC\_Employee\_Details”.

Once we have taken note of the WebUserControl, we then go to Administration/Site Management/User Controls and select that specific WebUserControl at the top “Select User Control Drop Down”.

We can then check global permissions for each action by user. We can allow Edit for Administrator and HR\_Manager only.

The image shows the 'Select User Control' dialog with the 'WUC\_Employee\_Details' user control selected. The dialog has tabs for 'Common Property', 'List/Grid View Property', 'Add/Edit/Form View Property', and 'Hide/Show Fields'. The 'Common Property' tab is active, showing the following settings: Name: WUC\_Employee\_Details; User Control Type: AutoInterface; Table Name: employee\_details; Condition: [[FromCodeBehindFunction=CodeBehind\_Functions.f]]; Order By: name asc. Below these are sections for 'Login Required', 'Allow Add for:', 'Allow Edit for:', 'Allow Delete for:', and 'Allow Programming for:'. Each section has checkboxes for various user types: Administrator, Customer, Help, HR Trainer, Junior Inspector, Manager, Subcontractor, Supplier, and User. The 'Allow Edit for:' section is highlighted with a red box, showing that the 'Administrator' and 'HR Manager' checkboxes are checked. On the right side of the dialog, there are sections for 'Inserting Method:', 'Inserted Method:', 'Updating Method:', 'Updated Method:', 'Deleting Method:', and 'Deleted Method:'. The 'Inserted Method:' and 'Updated Method:' sections are highlighted with a red box. At the bottom right, there is a 'Remove AJAX:' checkbox and a 'JS Content:' text area. The 'Select Module:' dropdown is set to 'HR'. An 'Update' button is at the bottom center.

**Note:** Managing user controls in this manner instead of simply selecting the user control by employee is far more effective but does require some time to complete all the settings for each page and WebUserControl. However, for future management,

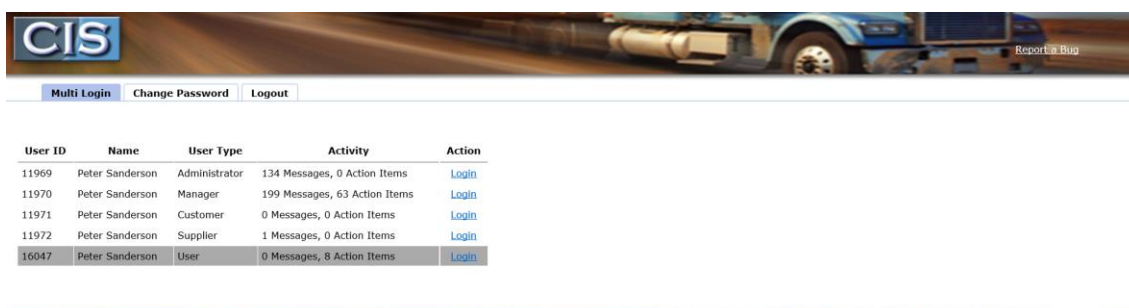
if you wanted to add or restrict access for a group of managers, you can do so by editing just the page as opposed to editing all of the managers one-by-one. Additionally, you may have your own group of user types each with their unique access and permissions.

## Multi-User Access

The Multi-User Access in CIS allows one user to have one login username and password but have access to multiple CIS User Types without having to login each time. This can be extremely useful for the Administrator and programmers, giving them instant access to all the user types. Using this access they can log in as that user type to verify that the access and permissions were set up correctly. This is also useful to verify the customer's and supplier's access settings because you log in as a customer or a supplier and can verify their home page and access.

Additionally, the administrator may also be a manager in the system and should always log in as a manager each time unless he/she plans to do administration work. Action items and calendar events are not assigned to an administrator.

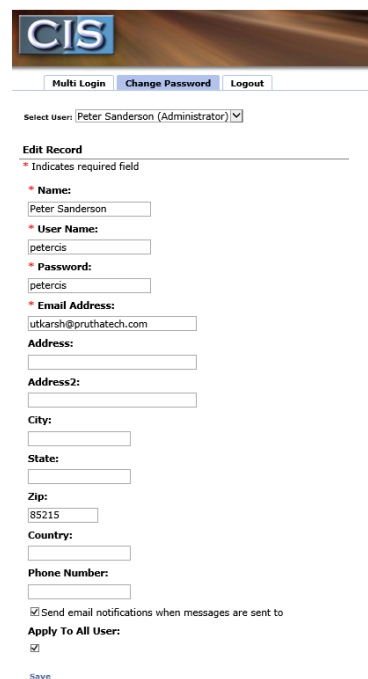
When logging in as a multi-user, the multi-user is presented with a screen that highlights all messages and quantity of open action items for each of the CIS systems and may select the user type to login as. The major advantage to a multiuser login is when you log out, you are returned to the multiuser login screen and can instantly log in as a different user type. So, bouncing back and forth between different user types becomes fast and simple.



User ID	Name	User Type	Activity	Action
11969	Peter Sanderson	Administrator	134 Messages, 0 Action Items	<a href="#">Login</a>
11970	Peter Sanderson	Manager	199 Messages, 63 Action Items	<a href="#">Login</a>
11971	Peter Sanderson	Customer	0 Messages, 0 Action Items	<a href="#">Login</a>
11972	Peter Sanderson	Supplier	1 Messages, 0 Action Items	<a href="#">Login</a>
16047	Peter Sanderson	User	0 Messages, 8 Action Items	<a href="#">Login</a>

Additionally, once a user becomes a multi-user, the new multi-user takes control of their password and login name. They may change it at any time. In fact, we recommend that a multi-user immediately change their log in for security reasons. The reason for this is as follows:

If a company gives a customer a login and the customer requests a multi-login because they deal with other suppliers using CIS, then it would not be desirable for the company who gave access to their system to see and be able to login as that customer to have access to other company systems (such as a competitor).



**CIS**

[Multi Login](#) [Change Password](#) [Logout](#)

Select User: Peter Sanderson (Administrator)

**Edit Record**

\* Indicates required field

\* **Name:**

\* **User Name:**

\* **Password:**

\* **Email Address:**

**Address:**

**Address2:**

**City:**

**State:**

**Zip:**

**Country:**

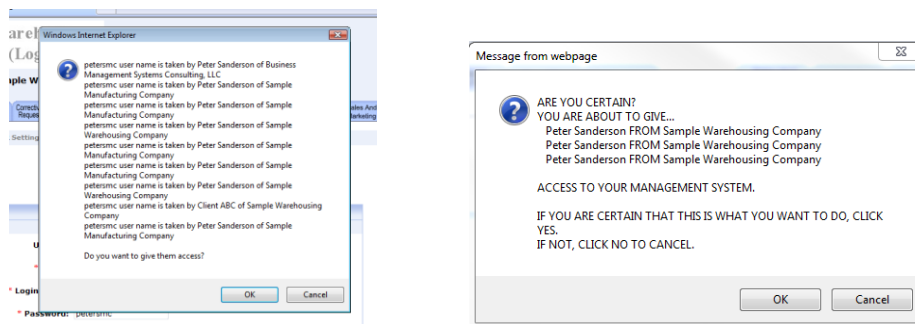
**Phone Number:**

☒ Send email notifications when messages are sent to

**Apply To All User:**  
☒

[Save](#)

To give user multi-user login permission, you simply add the user a second time in your CIS system using a different user type (manager, customer, supplier, administrator or user) and use the **same user login name and e-mail address**. Once you save that user, you will be presented with the following two notifications to accept (one after the Other):



**Note to Administrator:** For security reasons, each time we add a multi-user, cis **may** change the new multi-user's password with a new generated password and send the user the new password by e-mail. When and if this happens, it is important to note since the user will not be able to log in using their old password. Additionally, this e-mail often ends up in the user's junk mail folder.

Furthermore, CIS will not allow a duplicate username with a different person or e-mail for security purposes.

The multi-user can change the new password back to the old password when they log into CIS and have the first multi-user login screen (see previous page). If the user does not receive the password, they can use the "forgot Password" on the log in screen and CIS will e-mail them their password.

Welcome to the world's most comprehensive quality management software system available anywhere! CIS Software CIS 2018 Version 1 surpasses all expectations and ensures the continuous improvement and success of all our customers.

#### Login

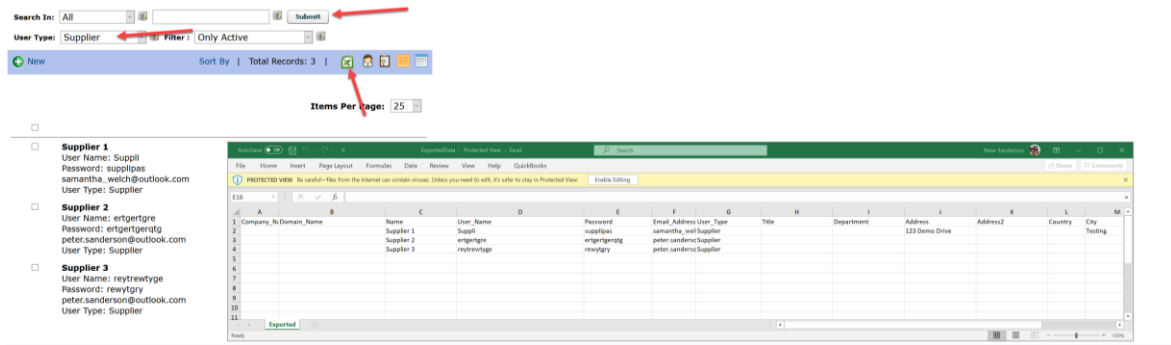
User Name:

Password:



## User reports

You may create a spreadsheet of users by selecting user types then clicking submit. This will display all the users in that user types selected. Then select all by clicking the top square box and finally select the excel spreadsheet icon.



There are many uses for having the ability to preview or export the data:

- See all usernames and passwords except multi-users,
- Look for duplicates,
- Export to other software.

Additionally, we can get a preview or printout of the employees in the HR and the employees with their training.

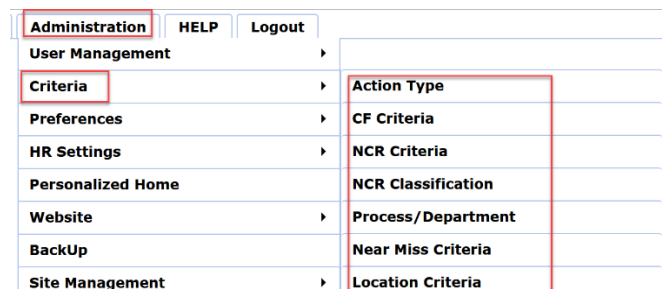
**Note to Administrator:** The ability to filter, sort and export to Excel exists in each existing App and is part of all new Apps you create.

## Administration/Criteria

Setting up your criteria before you start working with CIS is a very important step. Each App has data to be entered into the records that is selectable and standardized. For example: in the Non-Conformity App, you may have a variety of Non-Conformity criteria (types) that you want to track such as late delivery, welding cracks, hardness failure, temperature failure and others that pertain to your specific industry. It is best to take the time to establish these criteria to best suit your needs. We also suggest that you create criteria named “other” in each section to accommodate situations where a new criterion is required and may be explained in the description memo field. We recommend this to help ensure that all entries are made. We have found that many employees will shy away from entering results when a criterion is not in the system and they have no logical choice. Therefore, “other” may accommodate these situations. If an “other” becomes more frequent, the administrator may always add it to the criteria later.

**Note:** If you have data such as product codes, you may have this imported into your system to avoid data entry time. Please contact your consultant for more information and to obtain a quote for this service.

Click on Admin tab then click on Criteria.





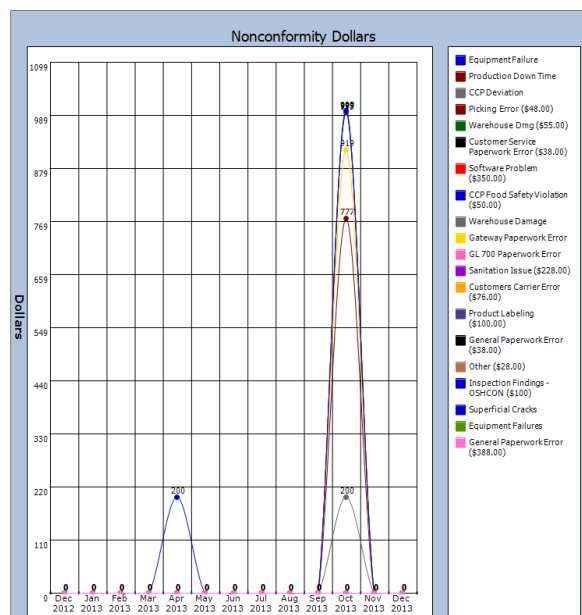
You now can establish **your own** criteria as seen below. Remember that you may change the Caption (how that criteria field is displayed globally across CIS) for each field. For example, Process Department may have the caption changed to Process while you can change Location to Department.

- Action Type - This criterion is completed as default but is used in the actions resulting from an internal auditing. You may edit the existing criterion or add others
- CF Feedback - Customer Feedback Criterion such as late delivery, damaged, wrong product, other, etc. We also suggest that you include a criterion for Positive Feedback to balance the reporting
- NCR Criteria - Nonconforming Report Criterion such as picking error, over/under, late delivery, contract errors software, etc...
- NCR Classification - In the food industry, they require each NCR to be classified as serious, major or unsatisfactory. If you are not in the food industry, you may use this to further classify your Non-Conformity. Some suggested classifications may be cost related or by how serious the Non-Conformity impacts your product or service
- Process/Department - You may enter the department or processes in your organization. Most people enter processes since they are more specific. However, please note that you may always add a new field if you require both Department and Process. This field is used in many graphs such as NCR by Process/Department
- Near Miss Criteria - This is required for companies that handle chemicals in the United States. If you do not handle chemicals, we suggest you use the near miss to record accidents and injuries that occur and classify these near misses by the seriousness (hospital, clinic, treated in-house, etc.)
- Location Criterion - building one, two, three, or when there is only one building, you may enter the departments if you have only one location
- Product Code Criteria - you may enter products by groups, such as rubber products, paper products or you may enter the actual SKUs
- Near Miss Classification – Similar to NCR and could be used to classify how close a near miss came from being an actual nonconformity
- Work Criteria -The work order categories such as maintenance, re-work, sanitation, etc.
- Requirements Type (see Special Requirements) - Many organizations may use the Special requirements as a process flow card and have the requirements for each process. If you do this, you then may print out a process card for each job to follow the products and record results
- Documents Type (Procedures and Forms) - You may identify types of documents and forms such as Quality Procedure, SOP, External Document, Lab Procedure, Training, Reference Recipe, etc. By identifying the documents, you may use the sort feature to locate documents more easily
- Training Criteria (see Training) - You should include all of the possible training titles provided such as new Employee Indoctrination, Safety, Lift Truck Certification, etc.
- Client Type Criteria - Set the type of clients you may be tracking in the Sales and Marketing App. This may include criteria such as Monthly client, One-Time Client or by size of jobs under 50,000/Year, 50,000 to 100,000/Year etc.
- Inspection Code - Criteria should include the various inspection dispositions in-use such as scrap, rework in house, return to supplier etc. (See special section on Inspection Codes)
- Issue Type - The issue comes defaulted as quality and offers environmental, safety, security and performance. When reporting information, the graphs and charts can be reported by issue type. You may edit these issue types and/or add additional ones
- Product Category - Product category for inventory kitting and inventory management. For example, you may separate products into categories for viewing and sorting. If you are a computer manufacturer then you may use Main Product Category for all computers while Ordered Material for parts that go into the main product and then if you also perform sub-manufacturing such as manufacturing the box, these may be listed as Sub Products. These are just examples
- Accident/Incident Criteria - All the criteria in this section are completed as default and are used in the Accident and Incident OSHA App. Do not revise this section without talking with your consultant or having received training in programming CIS
- Potential Hazard Criteria –This is completed as default. You may edit and revise. It is used in Risk and Performance for clients in nonfood industry or for HACCP in food industry clients

- Severity - This is completed as default. You may edit and revise. It is used in Risk and Performance for clients in nonfood industry or for HACCP in food industry clients
- Potential Fraud - This is completed as default. You may edit and revise. It is used in Risk and Performance for clients in nonfood industry or for HACCP in food industry clients
- Labor Rate Criteria - Enter labor rates in accordance with labor codes or descriptions. This is used in Maintenance and other Apps to calculate total cost based on hours worked
- Safety Walkthrough Criteria - Criteria for the findings for the safety walkthrough. This is completed by default but you may edit or add to it
- Process Authorization – Some examples come as default, but you may add or edit this criterion. It is used to log employees with authorization to approve purchases, or approve NCR resolutions, drawing etc. You may even have multiple levels like Purchases up to \$ 1,000.00, Purchases up to \$ 5,000.00 etc.

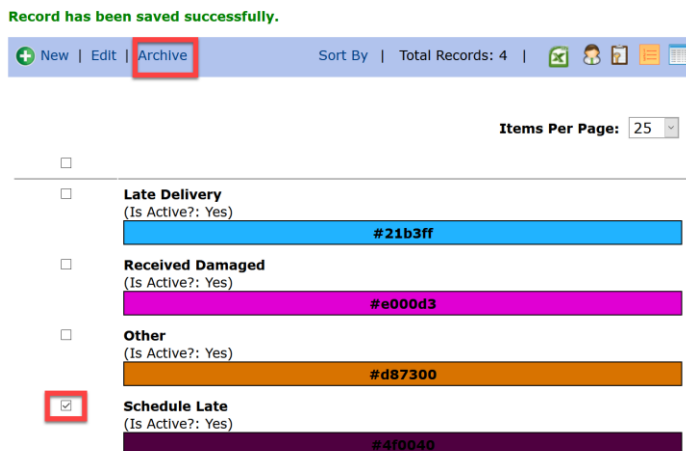
You must establish accurate criteria for your type of business for CIS to function properly. Click on the criteria type then click “+New”. You may enter any criteria terminology that is best suited for your business and you then must select a color for the graph line. If you use an aggressive pop-up blocker, you may have to disable it since the color palette is a pop-up.

The charting features will automatically chart and report the NCRs, CAR, Near Miss and Customer Feedback (Customer Feedbacks) by these criteria in dollars, occurrences and quality achievements. Therefore, you should take the time to establish the proper criteria and classification for each section.



Each of the sections must have at least one criterion entered. Once a criterion is entered, you may select it and choose between active or archive. If you choose active, this criterion will be reported on the graphs. This feature is useful to control the number of criteria reported. For example, if for two months there were problems with labeling and the problem was

solved, then you may not want to see this criterion on all the charts since it will be zero. In this case you may archive that criteria.



## Inspection Criteria Details

CIS can be set-up to monitor the supplier/subcontractor's performance on a weekly or monthly basis. However, for this to work properly, we must make some adjustments to how we use the inspection codes in the Inspection App. By looking at how the inspection criteria is graphed and reported, we can make a sound judgment on how to set-up the inspection criteria so that it will graph the important supplier performance.

First, the criteria must include all applicable options that result from an inspection in order to see the good and the bad. For example, we cannot just include criteria for failure such as damaged, missing paperwork, or other such specific criteria. The criteria should be set-up to account for the result of each inspection, both positive and negative. This will then translate into a positive versus negative report and graph.

Example:

- Accepted
- Accepted with Concessions
- Rejected—Returned to supplier
- Rejected—Reworked In-House
- Rejected—Scrap

After reviewing the above inspection criteria, there may be a need for additional criteria to fill in the gaps. For example, if your receiving inspection often rejects items and puts them on hold because a Certificate of Compliance is missing and the supplier must e-mail or fax the certificate before the product/material is released, you could add other criteria such as:

- Reject—COC Required

Once the inspection criteria are completed as above, you then must enter all inspections in CIS in order to capture the true picture.

The payback is that you can give your supplier access to the Reports and Graphs and they can log in anytime and see exactly the quantity of jobs accepted versus rejected and the result of each reject.

Supplier monitoring and review could then be simplified within your procedure to require a review of any supplier who has less than 80 % accepted receiving inspections. CIS allows for a log entry in the Vendor section to record these reviews.

Furthermore, the suppliers will know you are aiming at them before you load your gun!

## Administration/Preferences

### Company Information

For certain CIS Software to create reports such as Purchase Orders, OSHA Reporting and other Apps that you may create, the company information must be entered in preferences. The tax rate for purchase order calculations is entered here as well.

Click on administration, then preferences then company info to enter this information about your company.

You may also upload your company logo (Jpg or Gif Files) so that it appears on top of your CIS Database. Prior to uploading, the logo is best at 75 Pixels height and 375 Pixels width. You may vary from this but try to keep it around this size for appearances.

The form contains the following fields:

- Company Name:** 2019 Demo Manufacturing
- Address:**
- Address2:**
- City:**
- State:**
- Zipcode:**
- Country:**
- Phone:**
- Fax:**
- Website URL:**
- Company Email:**
- Company Logo:** A "Browse..." button with the text "No file selected." below it. Below the button is a TQMS logo and a note: "The ideal size of logo is 375 X 75 (W X H) in pixels."
- Daily Backup:** A dropdown menu set to "Yes".
- Vendor Tax Rate:** 1.00 (Percentage for purchase orders)
- Module List:**

### Multiple CIS Options – Large Corporate Users

CIS has the option to be used at multiple sites and set-up in various settings to accommodate most all large corporate needs.

A larger organization may have an unlimited number of CIS systems set-ups in various settings. Each CIS system will have their own App that requires each CIS system to upload and control their own documentation in Procedures and Forms. An optional set-up allows for one (corporate) site to control the procedures and forms and each linked CIS system will mirror the corporate site's procedures and forms. In this set-up, only one documentation system is controlled by the corporate office and each site may include their specific requirements in Special Requirements. Each CIS system in this scenario is grouped together. Another advantage to creating a group of companies is that the corporate administrator may add and edit the criteria easily for the other companies in the group by selecting existing criteria and clicking add.

s	Administration	Sales And Marketing	Logout
	User Management		
	Criteria		
	Preferences		
A	HR Settings	Company Info	
	Personalized Home	Company Group	
	Website	Email Templates	
	Site Management	Print Templates	
		Select Managers for CAR Email	
		Email Settings	

In order to create a group the administrator must request the other companies to join the group by going to Administration/Preferences/Company Group.

Once in the Company Group App the administrator may invite the other companies to join the group. The administrator would need to know the company's name and domain names in the CIS System.

The group **Group 1** is approved. You can invite other your companies by clicking below link.

[Click to Invite Companies to Join Group](#)

Set Shared Company: CIS Demo

Following are the list of Joined Companies in this Group.


CIS Demo  
CIS Demo 2013  
CisTest

[Click to Share Criteria](#)

The form contains the following fields:

- Invite Company**
- \* Indicates required field**
- \* Company Name:** CisTest
- \* Domain Name:** www.CisTest
- Save** button

Once a company is invited, the administrator in the other company (which may be the same person in all companies) must accept the invitation.



Welcome, CIST Test Admin (Administrator)
Last Login: 01/03/2014 07:01:05

Company Group  
[Report a Bug](#)

Home
Document Management
Quality Input Data
Reports And Graphs
Management Tools
Administration
Sales And Marketing
Logout

eter Sanderson is invited to join group "Group 1".

Please click [here](#) to accept group OR Please click [here](#) to decline group.

---

| CIS 2014- Continuous Improvement Software - 2014- Version 1 | © TQMS Inc. | Cloud Computing at its BEST | Developed using Prutha Technologies - A Web Development Application Company |

Once accepted, the administrator in the corporate system may access and add criteria in the other companies by clicking “click to share” which opens a screen to select the criteria to share. Click add under each company to add the criteria to that company.

Home
Document Management
Qua

Following are the list of Joined Companies in this Group

CIS Demo  
CIS Demo 2013  
CisTest

**Shared Company:** CIS Demo

[Click to Share Criteria](#)

Share Criteria For: ☐ NCR Criteria [Render](#)

[Add New Criteria](#)

Criteria	CIS Demo	CIS Demo 2013	CisTest
AUDIT RESULT	X	<a href="#">Add</a>	<a href="#">Add</a>
CCP Deviation	X	<a href="#">Add</a>	<a href="#">Add</a>
CCP Food Safety Violation (\$50.00)	X	<a href="#">Add</a>	<a href="#">Add</a>
Communication error (\$38.00)	X	<a href="#">Add</a>	<a href="#">Add</a>
Compilation Error	<a href="#">Add</a>	X	X
Customer Service Paperwork Error (\$38.00)	X	<a href="#">Add</a>	<a href="#">Add</a>
Customers Carrier Error (\$76.00)	X	<a href="#">Add</a>	<a href="#">Add</a>
Equipment Failure	X	<a href="#">Add</a>	<a href="#">Add</a>
Equipment Failures	X	<a href="#">Add</a>	<a href="#">Add</a>
Gateway Paperwork Error	X	<a href="#">Add</a>	<a href="#">Add</a>
General Paperwork Error (\$38.00)	X	<a href="#">Add</a>	<a href="#">Add</a>
General Paperwork Error (\$388.00)	X	<a href="#">Add</a>	<a href="#">Add</a>
GL 700 Paperwork Error	X	<a href="#">Add</a>	<a href="#">Add</a>
GL 700 Picking Error	X	<a href="#">Add</a>	<a href="#">Add</a>
Hidden Deviation from Old Inhouse (70.00)	X	<a href="#">Add</a>	<a href="#">Add</a>

If the administrator wants to share the documentation system with another company in the group, they simply select the company to share.

The group **Group 1** is approved. You can invite other your companies by clicking below link.

[Click to Invite Companies to Join Group](#)

**Set Shared Company:**  [Save](#)

Following are the list of Joined Companies in this Group.

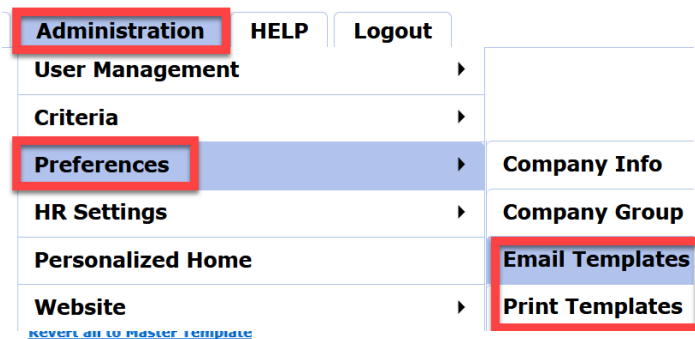
CIS Demo  
CIS Demo 2013  
CisTest

[Click to Share Criteria](#)

## Customizing the E-Mail Notifications and Printed Reports

You may customize the e-mails and reports and insert your own statements and wording, colors, or any other information that you would like. However, once you edit an e-mail or report template, the template becomes your specific template and any future revisions to CIS will not over-write your templates. If for some reason a template becomes corrupted, you can revert to the master template. The templates supplied by CIS will automatically load your logo at the top and provide the statements and informational fields that are in the template.

Click on Preferences then click on e-mail templates or print templates to edit:



### Email Template Editor

\* Indicates required field

#### \* Template Name:

#### Subject:


























































#### Bcc:

#### Parameters:

[[LOGO]]  
[[FK\_USERS\_MANAGER]]  
[[PK\_MEETING\_AGENDA]]  
[[VIEWLINK]]  
[[ACTIONITEM\_DESCRIPTION]]  
[[DUE\_DATE]]  
[[MEETING\_TITLE]]

#### Content:

HomeInsert



To edit the e-mail, enter the following:

- Select the Template Name at the very top
- From - the e-mail address that the e-mail will show as from
- Subject - what you would like in the subject of the e-mail
- BCC - the e-mail address of a manager to receive a blind copy if desired
- Parameters - The fields of information that you want to be included in the e-mail (Control and click to select)
- Enter the message in the editing of the e-mail screen then click Save

Some interesting solutions to common challenges that the template editor may resolve include:


- There are many unique solutions to specific paperwork problems that can be solved by editing these reports. Therefore, when you see paper or reports that are currently used in your organization, stop, think, and try to determine if CIS can eliminate these reports by editing the templates to suit your needs

**Note to Administrator:** The customization of the reporting e-mail and print templates in CIS is often overlooked by most CIS administrators and programmers. Unfortunately, this is a big mistake that could be avoided at the very set-up of CIS.

By modifying the templates, you can target the information to managers in a simple (easy-to-read) manner that is best suited to achieve your objectives. At the end of this section, we have inserted some examples of modified templates to meet the needs of various objectives.

Do not be intimidated by the CIS on-line editor that is explained below. You may use Microsoft Word and create beautiful forms using the table and color features in Word and simply add the field names where you want the information to be displayed then copy the complete form by highlighting it in word and copy then paste into the specific template in CIS. Before you paste the Word form in, it is best to delete all the HTML so that the template is completely blank. Always keep a copy of your WORD forms so that you may edit them in Word and re-copy and paste if you wish to make updates. Editing word pasted forms in CIS is extremely difficult.

### SAMPLE OF A FORM CREATED USING MICROSOFT WORD AND PASTED INTO CIS TEMPLATE



You LOGO Will  
Appear on Reports & Forms

NON CONFORMANCE REPORT					
VENDOR		PART NUMBER		REFERENCE	
CIS Customer 2		L-ISOLEUCINE		bol06777	
LOCATION		CRITERIA		CLASSIFICATION	
PL2 WH		Product Labeling (\$100.00)		Major	
<b>DESCRIPTION</b>					
Product labelling was incorrect for the product.					
RESOLUTION DESCRIPTION		RESOLUTION TYPE		MRB: RPR <input type="checkbox"/> UAI <input type="checkbox"/> FEB: RWK <input type="checkbox"/> SCR <input type="checkbox"/> RTV <input type="checkbox"/> INT <input type="checkbox"/>	
<b>ACTIVITIES SUMMARY</b>					
MATERIAL USE		TRACKING NUMBER		APPLICABLE SPECS	
<small>(Use information required for bench stock (Ex: fasteners, bolts, nuts, corner pins, etc.)</small>				<small>Others:</small>	
REPORTED BY	MFB Group	DATE	9/22/2009	RESOLUTION COST	100.00
PRELIMINARY REV	DATE	MRB QUALITY	DATE	MRB ENGINEERING	DATE
MFG Buyoff stamp & date, work perform meets MRB requirements & all data is documented in Activities Summary			QA Buyoff stamp & date, verify work perform meets MRB requirements, all required data is recorded herein		

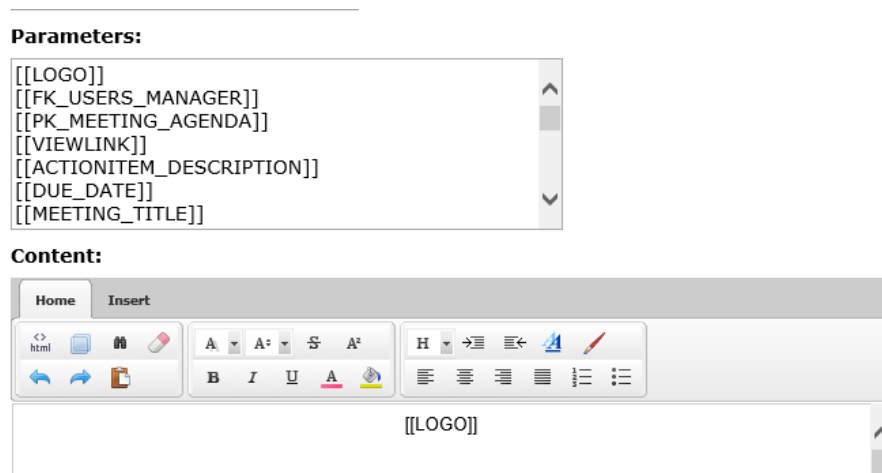
©2009 This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was printed.

Form 24-02

## Using CIS Editing Tools:

There are a few simple steps that will make the job easy and quick. We will discuss these here. If, however, you are experience difficulties, you may always contact your Master Distributor or Consultant for some additional assistance.

First, let us have a look at the template editor and the basic tools at our disposal:



To have CIS place information from the database record into your report, you must use the applicable field names. When editing the template (E-mail or Report) the available field names and how they should be entered is always listed on top in a scrolling box (see above). The field name must be placed into the template where you want to see the information and must be exactly as shown, including the square brackets and capital letters (EXAMPLE: **[MEETINGTITLE]**). Therefore, if in our form we want to report the Meeting Title we could write “Meeting Title:” and then the field name that will display the meeting title as follows:

Meeting Title: **[MEETINGTITLE]**

We could also change the font color, size, alignment and type as shown below:

=====

Meeting Title: **[MEETINGTITLE]**

**Meeting Title:** **[MEETINGTITLE]**

Meeting Title:      **[MEETINGTITLE]**

=====

Perhaps the most challenging task is to create a table so that it resembles a form that we are already familiar with and use. The following steps will show us some guidelines on creating tables:

**Step 1:** First place your curser in the position that you want the table. Click the Insert table icon (see diagram above) and slide your mouse over the squares to select the quantity of rows and columns.



Content:

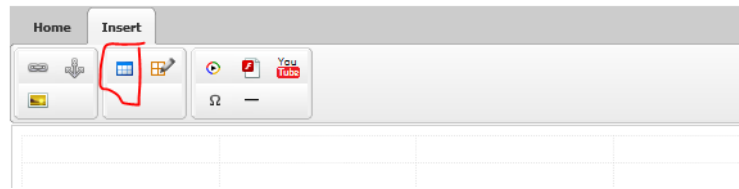
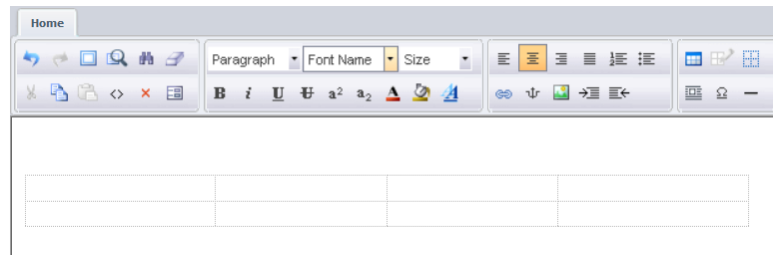
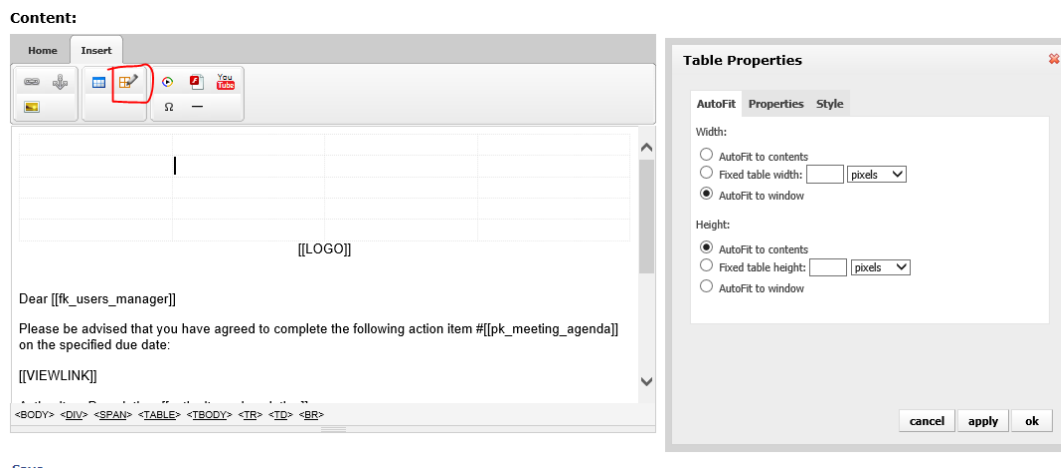


Table is inserted into the Form



**Step 2:** The table is inserted into my template. However, when I start typing in a cell, the column expands to the right side leaving virtually no room for the actual field name. Therefore, I must take the next step to define the cells. I place my cursor in the first cell then click the edit table icon and I will be presented with the option to edit cells. When I click the edit cells, I select fixed cell width at 20 % (20 % of the page), then select to apply to the current column and apply (see result below). There are many options for creating and editing tables so take the time to experiment with the various settings until you become an expert and creating wonderful professional forms and e-mails..



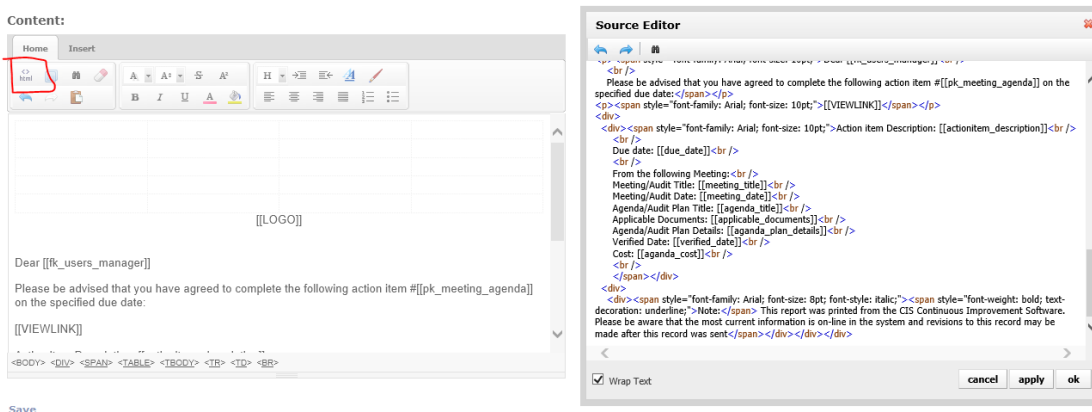
In summary there are a few additional commands that you may need to get your form to look “just right”. Since the template editor is an HTML on-line editor, certain functions that we are accustomed to use do not work. For example, right clicking, copy and paste do not work. You must use the copy and paste icon in the template editor.

The other function is the Enter (return) key on your keyboard that usually will create a new line below the point where you click “enter”. We often use this to add a line space between two lines. However, with the on-line HTML editor, you MUST press “SHIFT” + “ENTER” to achieve the desired result of pushing the line down.

To add page breaks, you must add the following code into the bottom of the code section of your form:

`<p style="PAGE-BREAK-BEFORE: always"></p>`

See the diagram below on how to access code. You may also use other software to design forms and then copy the code into the code section. But remember, you must use our field names (see above).



Now that you are armed with this new information on Form editing, you can modify all your forms to meet your needs. Remember, you can title the NCR Report to read “Discrepancy Report” if that is the terms used in your organization. Change Customer to Client or Part Number to SKU Number. The sky is the limit!

Below is a sample Corrective Action Request E-mail Report. Notice how only the required information is presented in the e-mail.



Sample Manufacturing  
Company (logo goes here)

## Corrective Action Request

[Click here to link to the CAR Record.](#)

**Due: 2/17/2008**

=====

**CAR Requesting By:** Peter Sanderson

**CAR ID:** 12

**Corrective Action Request Description:**

Several products issued to production without verification and there was no waiver or release document. The process was not in accordance with the Procedure WI-003 for order release.

**Note:** This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was sent

## Setting the Default Corrective Action Reminder and Managers

### Corrective Action Due Dates

Managers with permission to modify the Corrective Action due dates on a record-by-record basis may overrule this setting on a case-by-case basis. This feature will accommodate CARs that must be resolved either quickly or be allowed additional time. CIS will report late Corrective Actions to the default date set (see below) when the due date is not modified. If the CAR due date is modified, CIS will report the CAR late in accordance with the modified due date.

Click on Admin then click on Preferences then Select Managers for CAR E-Mails

[Save](#)

CAR Email Reminder - Periodic Days:

Sort By | Total Records: 5 |

Items Per Page:

<input type="checkbox"/>	UserID	Name	User Name	Email Address
<input checked="" type="checkbox"/>	11970	Peter Sanderson	petercis	utkarsh@pruthatech.com
<input type="checkbox"/>	11974	Bretta Kelly	brettacis	bretta@cissoftware.com
<input type="checkbox"/>	11978	Grant Sharp	grantcis	tech@pruthatech.com
<input type="checkbox"/>	13808	Peter Group	peter730975	hitesh@pruthatech.com
<input type="checkbox"/>	22066	Mark Wallen	MW1	Mwallen@ShippersWarehouse.com

You must set a period in days that all Corrective Actions must be resolved. Once a Corrective Action exceeds this date, all the Managers selected will receive an E-mail to advise them that the applicable Corrective Action is not yet resolved and is late.

First, you must select the Managers that you wish to be advised by e-mail when a Corrective Action is late. Note the manager responsible **WILL ALWAYS** be notified when the CAR is late, selected or not.

To set the reminder period, click Preferences, then CAR E-mail Reminder then enter the days and click set timer. The days are how many days a manager has to resolve a Corrective Action before it is considered late. We recommend that you start with a setting of 30-days and then try to incrementally reduce it to 10-days.

### E-Mail Set-Up for CIS System E-Mails

In the inspection App, we have the option to display and send e-mail reports to customers and suppliers when required. However, you may select to only display customers or suppliers in inspection. This may be useful for some companies that only do inspection on incoming product from suppliers and do not do final inspection on their product (unlikely situation). Select Administration/Preferences/E-Mail Setting. In this case, by selecting Supplier only, then only suppliers will be selectable in the Inspection App.

CIS sends out many notifications by e-mail such as Corrective Action requests, work orders, reminders and much more. The e-mails are sent via our e-mail server client. The challenge is to know when an e-mail is rejected because the e-mail address is incorrect or if the receiver of the e-mail replies, then these types of e-mails would be sent to our server and not back to your organization.

Therefore, it is important that you set-up CIS with a proper from and reply address so that someone in your organization is made aware when an e-mail is rejected or replied to. Select Administration/Preferences/E-Mail Setting.

Simply enter the “from and reply” addresses (normally the same) for your organization. Generally, this would be the Quality Manager or ISO Facilitator.

#### Edit Email Setting

\* Indicates required field

##### Inspection

- ☒ Customer
- ☒ Supplier

##### Email Setup

\* **From Email Address:**

\* **Reply-To Email:**

[Update](#) [Cancel](#)

## Select Managers for Document Notification E-mail

This setting allows you to select which managers in your organization receive e-mail notifications when documents are revised.

The screenshot shows the CIS interface with the 'Administration' menu open. The 'Preferences' option is selected, and the 'Email Settings' sub-menu is expanded. The 'Select Managers for Document Notification E-mail' option is highlighted. In the main content area, a table of users is displayed with columns for UserID, Name, User Name, and Email Address. The 'Save selected Managers' button is visible at the top left of the table.

UserID	Name	User Name	Email Address
2	Peter Sanderson	Peter	peter.sanderson@outlook.com
4	Samantha Welch	samantha	samantha_welch@outlook.com
7	Derek Tahamont	rtyhetrvy	peter.sanderson@tqms.com
13	Brech, Edward	Brech,	edward.brech@metalwest.com
14	Simons, Jeffrey	Simons	jeff.simons@metalwest.com
15	Einwiller, Peter	Einwil	pete.einwiller@metalwest.com
16	Gill, Trent	Gill,	trent.gill@metalwest.com
17	Michel, Terry	Michel	peter.sanderson@outlook.com
18	Hackenberg, Beth	Hacken	beth.hackenberg@metalwest.com
19	Marrs, Jacy	Marrs,	jacy.marrs@metalwest.com

## Select Managers to E-Mail Vendor Survey

This setting allows you to select which managers in your organization receive e-mail notifications when a supplier completes a survey using the CIS Supplier Survey Portal.

The screenshot shows the CIS interface with the 'Administration' menu open. The 'Preferences' option is selected, and the 'Email Settings' sub-menu is expanded. The 'Select Managers to E-Mail Vendor Survey' option is highlighted. In the main content area, a table of users is displayed with columns for UserID, Name, User Name, and Email Address. The 'Save Selected Managers' button is visible at the top left of the table.

UserID	Name	User Name	Email Address
2	Peter Sanderson	Peter	peter.sanderson@outlook.com
4	Samantha Welch	samantha	samantha_welch@outlook.com
7	Derek Tahamont	rtyhetrvy	peter.sanderson@tqms.com
13	Brech, Edward	Brech,	edward.brech@metalwest.com
14	Simons, Jeffrey	Simons	jeff.simons@metalwest.com
15	Einwiller, Peter	Einwil	pete.einwiller@metalwest.com
16	Gill, Trent	Gill,	trent.gill@metalwest.com
17	Michel, Terry	Michel	peter.sanderson@outlook.com
18	Hackenberg, Beth	Hacken	beth.hackenberg@metalwest.com
19	Marrs, Jacy	Marrs,	jacy.marrs@metalwest.com

## Header Bitimages

This section allows you to customize the header on the top of CIS. You may create a header file and upload it. You may create multiple header files such as one for Christmas time, Halloween or for other special events. The size and resolution should be determined by the standard monitor resolutions in your organization and the space at the top of your CIS. We suggest n to 88 Pixels (n-max Width). Creating these files may require some expertise in working with picture file formats. CIS will accept the standard .jpg or .png.

The screenshot shows the CIS interface with the 'Administration' menu open. The 'Preferences' option is selected, and the 'Email Settings' sub-menu is expanded. The 'Header Bgimages' option is highlighted. In the main content area, a table of header bitimages is displayed with columns for Title and Image Name. The 'New | Edit | Delete | Apply' buttons are visible at the top left of the table.

Title	Image Name
Shippers	

When adding a new file, you should select font color that will contrast the color of your image. The font for the page description and other CIS information displayed. For example, you do not want a dark blue header with black font since it is likely you will not be able to see it. Therefore, a white font choice would be better.

## Select User Type for KPI

This setting allows you to select which managers in your organization can see the KPI (Key Performance Indicators) data on the home page.

## Sample of KPI on HOME Page

### Key Performance Indicators:

Number of Company-Wide Late Actions	14 Actions
3 Months Avg Closed CAR Days	0 Days
3 Months Avg NCR Dollars	\$166.67
3 Months Avg CF Dollars	\$0.00
3 Months Avg Receiving Inspection	0% Rejected
3 Months Avg In-Process Inspection	0% Rejected
3 Months Avg Final Inspection	0% Rejected

CIS Software - 2019 Demo Manufacturing Top 7 Criteria - DASH BOARD

[Click Here If You Require More Performance Indicators](#)

## Select User Type for Document Approved By

This setting allows you to select which managers in your organization can approve documents in the Document App. The managers selected here will become selectable in the document approval field in the document properties.

## Select User Type for Trainer

This setting allows you to select which User Types in your organization can be listed as trainers in the Administration/HR Settings/Standard Training Template under trainer by location.

Home | Document Management | Quality Input Data | Accident/Incident | Reports And Graphs | Management Tools | Risk and Performance | **Administration** | HELP | Logout

**Save Selected User Type**

Sort By | Total Records: 10 |

Items Per Page: 25

Type name

<input checked="" type="checkbox"/>	Administrator
<input checked="" type="checkbox"/>	Manager
<input checked="" type="checkbox"/>	User
<input type="checkbox"/>	Customer
<input type="checkbox"/>	Supplier
<input type="checkbox"/>	Subcontractor
<input type="checkbox"/>	Supervisor
<input checked="" type="checkbox"/>	HR Trainer
<input type="checkbox"/>	Help

Administration | HELP | Logout

- User Management
- Criteria
- Preferences**
- HR Settings
- Personalized Home
- Website
- BackUp
- Site Management

- Company Info
- Company Group
- Email Templates
- Print Templates
- Select Managers for CAR Emi
- Email Settings
- Select Managers for Docume
- Select Managers to E-Mail Ve
- Header Bgimages
- Select UserType For KPI
- Select UserType For Docume
- Select UserType For Trainer**

## Select Managers to E-Mail Customer Survey

This setting allows you to select which managers in your organization receive e-mail notifications when a customer completes a survey using the CIS Customer Survey Portal.

Home | Document Management | Quality Input Data | Accident/Incident | Reports And Graphs | Management Tools | Risk and Performance | **Administration** | HELP | Logout

**Save Selected Managers**

Sort By | Total Records: 176 |

Items Per Page: 25

UserID	Name	User Name	Email Address	
<input checked="" type="checkbox"/>	2	Peter Sanderson	Peter	peter.sanderson@outlook.com
<input checked="" type="checkbox"/>	4	Samantha Welch	samantha	samantha_welch@outlook.com
<input checked="" type="checkbox"/>	7	Derek Tehamont	rtyhetwry	peter.sanderson@tqms.com
<input type="checkbox"/>	13	Brech, Edward	Brech,	edward.brech@metalwest.com
<input type="checkbox"/>	14	Simons, Jeffrey	Simons	jeff.simons@metalwest.com
<input type="checkbox"/>	15	Einwiller, Peter	Einwil	pete.einwiller@metalwest.com
<input type="checkbox"/>	16	Gill, Trent	Gill,	trent.gill@metalwest.com
<input type="checkbox"/>	17	Michel, Terry	Michel	peter.sanderson@outlook.com

Administration | HELP | Logout

- User Management
- Criteria
- Preferences**
- HR Settings
- Personalized Home
- Website
- BackUp
- Site Management

- Company Info
- Company Group
- Email Templates
- Print Templates
- Select Managers for CAR Email
- Email Settings
- Select Managers for Document Notification
- Select Managers to E-Mail Vendor Survey
- Header Bgimages
- Select UserType For KPI
- Select UserType For Document ApprovedBY
- Select UserType For Trainer
- Select Managers to E-Mail Customer Survey**

## Administration/HR Settings

### HR First Time Set-Up

The Human Resource App is very powerful and **MUST** be set-up correctly at the very beginning. When starting with CIS for the first time it is important to follow the steps below so that you can enter all the past training of your employees into CIS in a few simple steps.

1. Import all existing Employees into your CIS HR App with the assistance of your CIS consultant or reseller.
2. See Criteria in the above section and enter all the Training criteria or the name of the trainings that your current employees have undertaken and completed in their job functions. This would include on the job coaching as well. This training would be what you want to have listed as past training. New training set-ups may be performed later after we complete the initial set-up.
3. Complete the Standard Training Template for all the Training Criteria (see below).
4. Complete the Training COMPLETED for each existing position whereby you have some sort of records to back the training up. Previous records may be a spreadsheet, forms or other databases. The intent is to add only the training for each position that was completed prior to

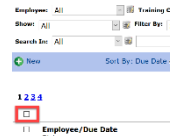
Administration | HELP | Logout

- User Management
- Criteria
- Preferences
- HR Settings**
- Personalized Home

- Standard Training Template
- Position Template

implementing CIS. Once we complete the initial set-up, you may return and add new training requirements for the future.

5. Under Human Resource Management/Employee Details you need to edit each employee and assign them their position and location. Once you do this, CIS will automatically schedule the training required for that position which in fact is the training that we know was completed (see step 4 above).
6. Under Human Resource Management/Trainings/Training Details we select “Show: Pending Training” and then select “All” for Items Per Page. This will display all the pending training for each employee which in fact is the training they previously had received, and you have records on file. Check the select box on top and all the trainings will be selected. Once Selected you may “Set as Complete” and under the Performance Comments or additional training you should note that this training was performed prior to the implementation of CIS and records of this training are on file <<specify where>> and are entered so that there is an accurate and complete Training history in CIS for each employee. CIS will then complete all the training and therefore all your past trainings will be accurately reflected with cost and hours in CIS.
7. Once your past training is in CIS, you may decide to go back and add new training that you want in the future. By doing this, Human Resource/Competency Verification Report and it will list all the employees currently in a position that is missing the new training requirements that you entered. From that screen, you may click schedule all the training and CIS will schedule the training and send out e-mail notifications and put the training on the company calendar and in the manager’s (trainer’s) action items.



**Note to Administrator:** The above steps are intended to import your past records. Steps 2 and 3 are described below. Steps 4 to 6 are described throughout the Human Resource Section of this manual.




## HR Set-Up

These settings allow you to associate standard training with positions so that when you enter a new employee into the HR database or revise an existing employee’s position, CIS will automatically schedule the standard training and send out e-mail notifications to the managers and employees to advise them. Additionally, the training will appear on the manager’s action items and on the Master Calendar. This feature will ensure that all new employees receive their proper training when they start since training not performed will be reported as pending or late.



In order for this to work, the following set-up is required:

First go to administration then click on HR Settings/Standard Training Template. The standard training should already be entered in the criteria section (see Criteria in previous section further above). Under Standard Training Template, you may select the standard training and then enter the required information for the standard training. The cost should be the cost for the one employee and not the complete cost of a course. The advanced notice time is the quantity of days that the trainer and the employee require to be notified in advance of the training due date. You may also enter a different trainer by location. This may be applicable if you have different locations and have a trainer at each location. CIS will assign the trainer by location for each employee in that location that requires the training.


**Note to Administrator:** The user types listed as trainers can include customers and suppliers. You may customize the user types listed in Administration/Preferences/Select User Type for Trainer.

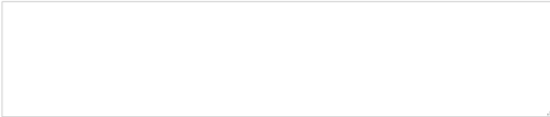


**Select Standard Training:**  
Select Training...   **Archived:** ☐ 


---


**Standard Training Template**  


\* Indicates required field


**Other Training:**   


  




**Hours:**   





**Trainer:**   





**Comments:**   





**Cost of Training (\$):**   



**Advance Notice Time:**   
14  in Days 

**Select Requiring:** ☒ Single Training ☐ Multiple Trainings



**Location:**

*Location	*Responsible Manager	Action
Select Location... 	Select Manager... 	 



This should be completed for each standard training criterion. If a criterion is missing, you must add it in the Administration/Criteria/Training Criteria section.






Once this is complete for all criteria, click on the Administration/HR Settings/Position Template above (below Standard Training Template).


**Position Template**  

\* Indicates required field



**Position:**   

**Show Archived:** ☐ 

\* **Position Name:**   

**Standard Training:** 

☒ CIS Software Introduction  
☒ Coaching OJT 20 Hrs  
☒ Coaching OJT 40 Hrs  
☐ EM 3.6  
☒ First Aid Junior  
☐ First Aid Senior  
☒ HAZMAT  
☐ Inspection Final  
☒ Inspection In-Process  
☒ ISO 9001:2015 Introduction  
☐ Lift Truck Safety  
☒ Safety Level 1  
☐ Safety Level 2

**Archive Flag:**  ☐ 

[Save](#)

In the position template, you may then start to add or select your employee positions and select the required training from the standard trainings presented. To select multiple trainings required for new employees, simply hold the Ctrl key on the key board and click each selection with the mouse.

Once this step is completed, CIS will automatically schedule training for all new employees entered in the HR system.

**Note to Administrator:** When you add training for a position after the initial set-up it will result in some employees requiring new training. You can then just run the Competency Verification Report (In Human Resource APP) and CIS will display all the employees that require the new training and then you may click one button to schedule all the missing training.

## Administration/Home Page

The home page may be modified by clicking on Administration, then Personalized Home Page.

Select Home Page: Manager Home Page ☐



---

### Personalized Home Page

\* Indicates required field


---

**Parameter:**

[USERNAME]	 
[COMPANY]	
[ACTION_ITEMS, ITEMS, CHARACTERS]	
[MINI_CALENDAR, WIDTH]	
[COMPANY_NEWS]	
[CIS_NEWS]	

**Editor Content:**

Home Insert



---

Welcome [USERNAME] to your personal CIS Home Page for [COMPANY]

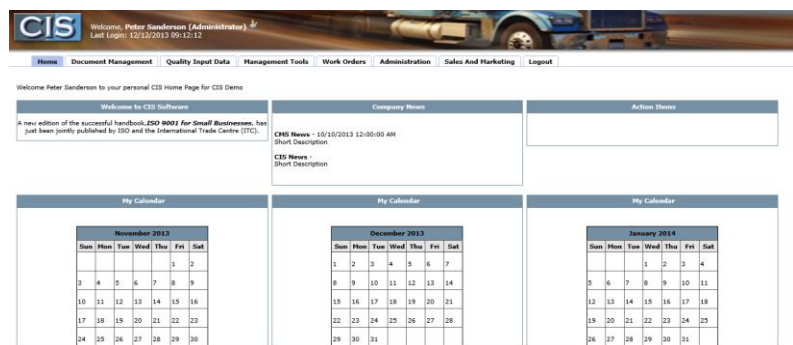
<p>Welcome to CIS Software</p> <p>A new edition of the successful handbook, <i>ISO 9001 for Small Businesses</i>, has just been jointly published by ISO and the International Trade Centre (ITC).</p>	<p>Company News</p> <p>[COMPANY_NEWS]</p>	<p>Action Items</p> <p>[ACTION_ITEMS, 10, 30]</p>
<p>My Calendar</p> <p>[MONTH] [MINI_CALENDAR, WIDTH,-1]</p>	<p>My Calendar</p> <p>[MONTH] [MINI_CALENDAR, WIDTH]</p>	<p>My Calendar</p> <p>[MONTH] [MINI_CALENDAR, WIDTH,1]</p>

Modifying the Home Page should only be performed by a person who is very knowledgeable about working with HTML codes and files. We recommend that you copy the existing home page as supplied and save it in a file in the case that your company's home page becomes corrupt or does not work after your modifications. In order to do these properly, click the view full screen then in your internet explorer, click on the top menu, View, and then click Source. This will display all the source code for the home page and this is what is required to be copied for a backup prior to modifying the home page. The source code can be copied back into this screen after a modification is completed unsuccessfully to revert back to our standard home page.

**Note to Administrator:** There will be a fee of \$ 75.00 USD charged to replace your Home Page if you do not maintain a copy and unsuccessfully modify this section!

Adding More Calendars to the Home Page

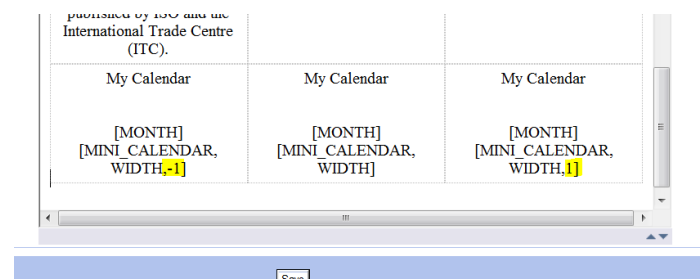
It is possible to show multiple months. For example, you could decide that the home page should contain last months, the current month and next month’s calendar like in the picture below:



In order to accomplish this, you must insert the code as follows:

To display the next month [MINI\_CALENDAR, WIDTH, 1] in home page editor. If you want to display previous month calendar, the variable should like [MINI\_CALENDAR, WIDTH, -1]. (Note, no number is current month)

See code for above three-calendar set-up:



## Administration/Website

### Posting News on the Home Page

News may be posted on the home page that is presented to company personnel when they login as well as on the page that is presented to customers and the page presented to suppliers. Select Add News or Select the news that you wish to edit and then enter the news and click save. Entering news is an excellent method of communicating current and important events. Additionally, entering news on customer and supplier home pages is an opportunity to communicate directly with them as well. You may add more news sections and determine who can view these by user types. So, you could have news for Managers, supervisors and other User Types yet post a separate news item for Sales only to see.

Website	News
BackUp	FAQ
Site Management	

**Note to Administrator:** It is always important to maintain the news current for your employees. This helps encourage the use and participation of all employees in the management system. Also, you can insert links to video, links to other sites and/or pictures.

**Add News**

\* Indicates required field


\* **News Date:**


\* **Title:**


\* **Short Description:**


**Description:**


HomeInsert


html






































































































































































































































































































































































































































































































































































































































































































































































































## FAQ Page

The FAQ section of CIS is designed to be a depository of information for your employees to easily search and find answers. Additionally, you can have FAQs by category and therefore employees can select a category such as safety, quality, production, HR or others and see all entries in that specific category.

The screenshot shows the 'Add New FAQ' form in the CIS system. The form has a title bar 'Add New FAQ' with a help icon. Below the title bar, there is a note '\* Indicates required field'. The form contains three main sections: 'Category:', 'Question:', and 'Answer:'. The 'Category:' section has a dropdown menu with 'HR Policies' selected. The 'Question:' and 'Answer:' sections are large text input areas. At the bottom of the form are 'Save' and 'Cancel' buttons. To the right of the form is a navigation menu with the following items: 'Administration' (highlighted), 'User Management', 'Criteria', 'Preferences', 'HR Settings', 'Personalized Home', 'Website' (highlighted), 'BackUp', and 'Site Management'. The 'Website' item has a sub-menu with 'News' and 'FAQ' (highlighted).

For example, there could be FAQs as follows:

- How many sick days do I get in a year?
- Is there bereavement leave?
- What is the Vacation Schedule?
- What is the drug policy?

With each of these questions there will be an associated answer entered. Therefore, you could in fact copy and paste your policy manual in section by section. An employee can then search using one word or a sentence and CIS will display all applicable entries. They can then click on the question and the answer will appear.

You may add as many FAQs to your FAQ page in CIS as you like. The FAQ page for employees is found under the home page.

## Administration/CIS System Back-Up

All data and uploaded files may be backed up by the administrator by clicking on administration, then back-up.

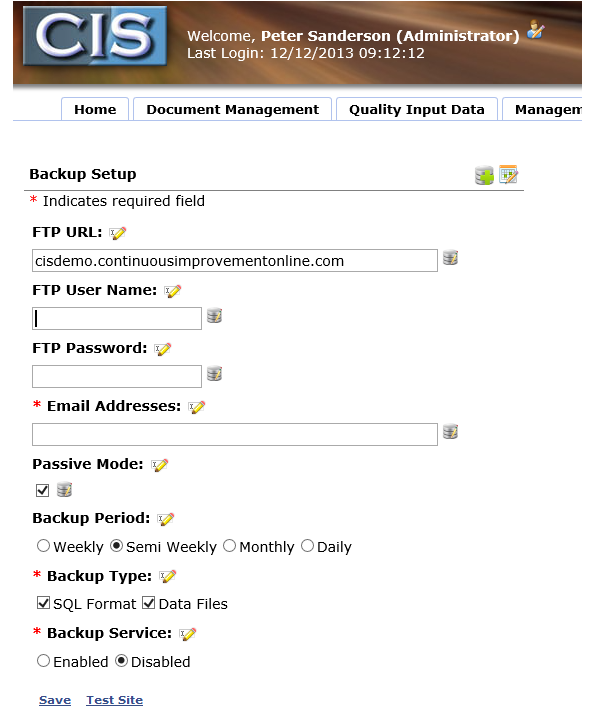
The CIS back up works during the evenings and you may choose an automatic schedule of semi-weekly, weekly or monthly. The CIS back-up of your system is sent automatically to an FTP site of your choosing. In addition, once the back-up is completed, CIS will send out an e-mail to the person responsible indicating if the back-up was successful or not.

The back-up section should be set-up by your in-house IT personnel since they must enter the FTP URL, username and password for where the back-up should be stored. Some companies may already have their own FTP site and others may have to acquire an FTP site of their own to store these back-ups.

CIS maintains full back-ups for the last seven days of all our customer's files and systems and the back-ups are performed daily. However, if you require more back-ups or would like to take control and own your back-ups, you may do so by following the steps below:

Enter all the information and then you may click Test to ensure that the back-up has access to your FTP URL.

Please note that these back-ups will be useable by any program that can read SQL databases. Therefore, if you should choose to no longer use CIS, you will never lose the work performed to date. However, the data is in table type formats and the CIS User interfaces will not be available.



The screenshot shows the CIS Backup Setup configuration page. At the top, there is a header with the CIS logo and a welcome message for Peter Sanderson (Administrator), noting the last login on 12/12/2013 at 09:12:12. Below the header is a navigation bar with links for Home, Document Management, Quality Input Data, and Manager. The main content area is titled "Backup Setup" and includes a legend indicating that an asterisk (\*) denotes a required field. The configuration fields are as follows: FTP URL (set to cisdemo.continuousimprovementonline.com), FTP User Name (empty), FTP Password (empty), Email Addresses (empty), Passive Mode (checked), Backup Period (radio buttons for Weekly, Semi Weekly (selected), Monthly, and Daily), Backup Type (checked for SQL Format and Data Files), and Backup Service (radio buttons for Enabled and Disabled (selected)). At the bottom of the form are "Save" and "Test Site" buttons.

**CIS** Welcome, **Peter Sanderson (Administrator)**  
Last Login: 12/12/2013 09:12:12

[Home](#) [Document Management](#) [Quality Input Data](#) [Manager](#)

**Backup Setup**

\* Indicates required field

**FTP URL:**

**FTP User Name:**

**FTP Password:**

**\* Email Addresses:**

**Passive Mode:**  
☒

**Backup Period:**  
☐ Weekly ☒ Semi Weekly ☐ Monthly ☐ Daily

**\* Backup Type:**  
☒ SQL Format ☒ Data Files

**\* Backup Service:**  
☐ Enabled ☒ Disabled

[Save](#) [Test Site](#)

# USING CIS CONTINUOUS IMPROVEMENT SOFTWARE

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## HOME

### Personalized Home Page

The Home Page displays a personalized home page for each user and a different page for customers and another page for suppliers when they login. We have included a standard home page with CIS. However, you can change, revise, and even customize these home pages for your organization. The standard (supplied) home page includes the following sections for each user when they log in:

- Their own calendar with underlined days when activities are due such as meetings. If there are meetings for the month, the user can click on the underlined date and the details will pop-up in a separate window,
- Company news that can be posted by your administrator. This section allows for the organization to advise all managers and/or a selected group of users of important company information,
- Key Performance Indicators.
- Your home page may look different and may include additional items as created by your company administrator.

**Personalized Home**

Welcome, Peter Sanderson (Administrator)  
Last Login: 02/04/2020 09:02:01

[Home](#) | [Document Management](#) | [Quality Input Data](#) | [Accident/Incident](#) | [Reports And Graphs](#) | [Management Tools](#) | [Risk and Performance](#) | [Administration](#) | [HELP](#) | [Logout](#)

Welcome Peter Sanderson to your personal CIS Home Page for 2019 Demo Manufacturing

**My Calendar**

February 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

**Company News**

Currently there is no News for you.

[Key Performance Indicators:](#)

Number of Company-Wide Late Actions	14 Actions
3 Months Avg Closed CAR Days	0 Days
3 Months Avg NCR Dollars	\$166.67
3 Months Avg CF Dollars	\$0.00
3 Months Avg Receiving Inspection	0% Rejected
3 Months Avg In-Process Inspection	0% Rejected
3 Months Avg Final Inspection	0% Rejected

CIS Software - 2019 Demo Manufacturing Top 7 Criteria - DASH BOARD

## Action Items (Personalized To-Do-List)

The action items listed are items assigned to the manager and are automatically displayed for the manager that is logged in. You will only see action items assigned to you. As these actions are completed, they are automatically removed from the action item list by CIS. Each action item includes a link to the action item page so that you may link to the action and complete it.

Module	Date Assigned	Actions	Other	Due Date	Link to Edit Screen
Agenda/Audit		Agenda - Discuss Ordering	Meeting ID - 61	03/04/2020	<a href="#">Click</a>
CAR	01/31/2020	Found rat droppings while walking through the warehouse.	CAR - 3	02/02/2020	<a href="#">Click</a>
CAR	01/31/2020	Crane 3456 and 7865 collided while loading 304 SS Bars	CAR - 2	02/02/2020	<a href="#">Click</a>
WorkOrders	01/31/2020	WO - Crane 3456 and 7865: (1) Inspect Cranes (2) Repair if Necessary (3) Re-Certify Cranes for use.	WO - 2	01/31/2020	<a href="#">Click</a>
Agenda/Audit		Agenda - Sales Weekly Overview	Meeting ID - 2	12/27/2019	<a href="#">Click</a>
Agenda/Audit		Agenda - SOP Review	Meeting ID - 60	11/29/2019	<a href="#">Click</a>
Agenda/Audit		Agenda - Create parts list and enter into computer	Meeting ID - 58	11/22/2019	<a href="#">Click</a>
Agenda/Audit		Agenda - Areas of Improvement	Meeting ID - 54	07/26/2019	<a href="#">Click</a>
Agenda/Audit		Agenda - Areas of Improvement	Meeting ID - 1	07/26/2019	<a href="#">Click</a>
NCR	07/12/2019	Product cracked during the unloading due to being extremely cold weather and the rubber became brittle. When lifting the rubber parts cracked.	NCR - 1 - Customer	07/12/2019	<a href="#">Click</a>
CAR	07/12/2019	Product cracked during the unloading due to being extremely cold weather and the rubber became brittle. When lifting the rubber parts cracked.	CAR - 1	07/14/2019	<a href="#">Click</a>

## Master Calendar

The calendar is a system calendar that shows on a monthly basis all outstanding activities. Click Home/Calendar. It is an instant summary of what is planned, due or late. This includes all actions that are required such as meetings, Corrective Actions, action items etc. You may view only selected categories by selecting one or more from the select category on the top.

To view different months, select the month and year then click update. To print the calendar, click print, place your cursor on the calendar pop-up that appears then right click and select print. Your computers print menu will appear for printing.

[Home](#)
[Document Management](#)
[Quality Input Data](#)
[Accident/Incident](#)
[Reports And Graphs](#)
[Management Tools](#)
[Risk and Performance](#)
[HELP](#)
[Logout](#)

Personalized Home

Action Items
Calendar

☒ Audit Date = Gray
☒ CAR Follow-Up Date = Navy
☒ Objectives Desired Date = Red
☒ PA-Follow-up = LightBlue
☒ Training Due Date = Orange
☒ Work Order Due Date = ThreedShadow

☒ PA-Action Completed = Tan
☒ PA-Additional = Goldenrod
☒ Sales & Marketing Due Date = purple
☒ Vendor Re-Evaluation Date = Brown

[Update Calendar](#)
[Print Calendar](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2 <a href="#">CAR (2)</a>	3	4 <a href="#">Meetings (1)</a>	5	6	7	8
9	10	11 <a href="#">Meetings (1)</a>	12 <a href="#">Meetings (1)</a>	13 <a href="#">Meetings (1)</a>	14	15
16	17	18 <a href="#">Meetings (1)</a>	19 <a href="#">Meetings (1)</a>	20 <a href="#">Meetings (1)</a>	21	22
23	24	25 <a href="#">Meetings (1)</a>	26	27	28	29

Calendar

Staff Meeting - Weekly

This version combines similar actions together as one entry on the calendar followed by a number in brackets that indicates the quantity of this action due that day. For example, if there are four (4) training scheduled for a particular day, it will appear on the calendar as Training (4) and when you place your mouse over the entry, a little pop-up box will appear with a

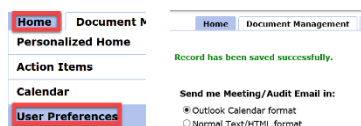


summary. If you click on the entry, another more detailed pop-up box will appear with the details of each action required. The entries named (User Calendar) will contain all the managers and employees that have made entries in their personal calendar such as vacation, out of town, in a meeting or other specific entry.

## User Preferences

### User E-mail Options

There are two options for user's e-mail preferences. Click on Home then Users Preferences:



The user's preference is to set how you would like to receive meeting e-mail notifications. CIS can send meeting e-mails in a normal e-mail format or in an Outlook meeting notification format that will automatically insert itself into your Outlook Calendar. The Outlook Calendar format should only be selected if you are using the full

version of Outlook and not Outlook Express. In this instance, the meeting dates, times and alarms will be in the user's outlook calendar and if using a PDA or Blackberry, the meeting will then synchronize with the portable device.

### User Calendar

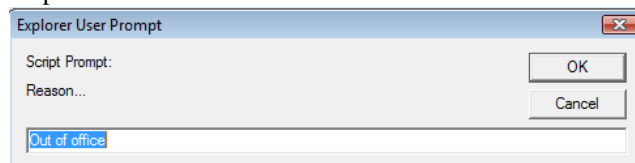
Each user can enter dates when they are on vacation or not in the office for other business reasons and this information will appear on the master calendar. Entries can be made one day at a time or by multiple days. In addition, it may be used to indicate that the user is busy in meetings, participating in an audit or simply not available. When the user enters this information into their calendar, their name and the reason will be included in the master calendar as part of the "User Calendar Group".

The user may enter information into their calendar as follows:

Select the date or select multiple events then click the memo pad icon in the date box selected. This will open a pop-up box to enter further information such as out of office, in meeting, sick, in ISO audit, etc. Multiple entries on a variety of dates may be made, but for the session to save, the SAVE button on the left top of the calendar must be clicked.

Add Multiday Events						
Save Calendar Changes						
December - 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 [memo pad icon]	2 [memo pad icon]	3 [memo pad icon]	4 [memo pad icon]	5 [memo pad icon]	6 [memo pad icon]	7 [memo pad icon]
8 [memo pad icon]	9 [memo pad icon]	10 [memo pad icon]	11 [memo pad icon]	12 [memo pad icon]	13 [memo pad icon]	14 [memo pad icon]
15 [memo pad icon]	16 [memo pad icon]	17 [memo pad icon]	18 [memo pad icon]	19 [memo pad icon]	20 [memo pad icon]	21 [memo pad icon]
22 [memo pad icon]	23 [memo pad icon]	24 [memo pad icon]	25 [memo pad icon]	26 [memo pad icon]	27 [memo pad icon]	28 [memo pad icon]
29 [memo pad icon]	30 [memo pad icon]	31 [memo pad icon]				

Please note that scripting is used to perform this function. Some versions of windows may display a notice and require you to temporarily allow scripting on the information bar on the top of the explorer screen.



## FAQ

Frequently Asked Questions is designed to be a depository for all your own organizational information and can be set-up by category. See administration for set-up. To use the system and find answers about policies or other company information, click Home/FAQ and then you can search by category or by topic. Simply type a word or group of words then search.

Home Document Management Quality Input Data Accident/Incident Reports And Graphs Management Tools Footer

### Frequently Asked Questions

Faq Category: All Search In: All Submit

- [Typical Questions about your company policies may be entered here so that when you click on the question the answer appears.](#)  
This is where the answer appears.
- [Are we ISO Certified](#)
- [How safe is it to work here?](#)
- [How are rejected products segregated and identified?](#)

When You click on the question the answer will appear below

## Lessons Learned

Lessons learned is a central depository and library of all-important information about your products, services and/or processes that you have learned by reporting a Nonconformity, Near Miss, Customer Feedback and/or completed a Corrective Action. In each of these Apps there is a check box at the bottom of the New Record Input Screen that when checked will automatically move the Title, Issue Type, Issue Description, and Lesson Learned over to this section. As time passes and the more you use CIS software to report and resolve issues the more comprehensive your Lessons Learned Database will become.

Enter Cost Account: # Inspection: none Archive Flag: Add to Lessons Learned: In NCR, NM, CF and CAR there is the check box that when checked will had the information to Lessons Learned.

This is one of the most useful tools in CIS to pass on information to new employees and the next generation. You can virtually type anything from customer name, product description, or process and if any of those words are in any part of the lessons learned Database, all the applicable entries will be displayed.

Home Document Management Quality Input Data Accident/Incident Reports And Graphs Management Tools Risk and Performance HELP Logout

### Lessons Learned

Issue Type: All Search In: All Submit

- [Damaged Due to Extreme Cold Unloading - Rubber](#)  
Issue Type: Quality  
Issue : Product cracked during the unloading due to being extremely cold weather and the rubber became brittle. When lifting the rubber parts cracked.  
Lesson Learned : Cracked rubber had to be segregated and scrapped  
[View](#)
- [Damaged Parts During Transit](#)
- [No Wet Floor Signs - Spill](#)

When you click a topic, the Issue Type, Issue and Lesson Learned will be displayed. Also, a link to the actual record (NCR, CF, NM or CAR) so that you may link to all the details.

## Document Management (Document and Data Control)

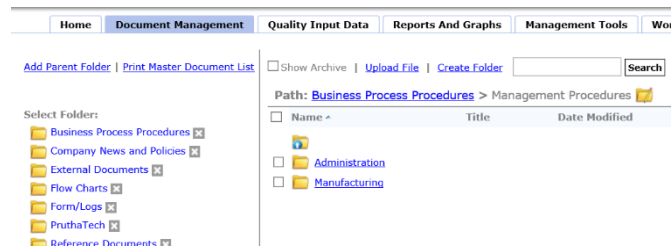
This section of CIS software is used to control all documents including management procedures, work instructions, forms/logs, training materials, inspection procedures, environmental procedures, risk assessments, company news/ policies, and outside sources (External Documents) and any other types of documents. CIS software will also provide a log of the history of changed documents.

### Establishing Folder Hierarchy

Before starting to load documents into CIS it is best to take the time to determine the folders and subfolders required to best navigate through your system. You can set-up parent folders and then subfolders within the parent folder and further subfolders in a subfolder (3-Levels). For example, you could set up folders in the following hierarchy:

Business Management Procedures:

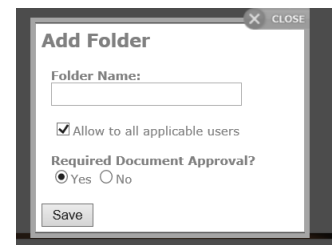
- Management Procedures
  - Administration
  - Manufacturing
- Policies



### Managing Folders

To add a parent folder, simply click on Add Parent Folder on the top left. You may then enter the name of the parent folder and select:

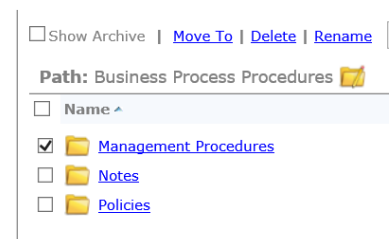
1. To allow all users access to this folder or that no one can have access to the folder unless set in the user's setting in administration. For example, if you want to add a folder for Sales Executives to maintain sales quotations and would only like the executive sales team to have access to the folder, then de-select "Allow to all applicable users". You would then have to go into Administration/Users and select each of the executive sales team and edit their record to add that new folder access.
2. Select if the documents uploaded into the folder will require an approval process before they can be accessed by users.



To add a subfolder simply click "Create Folder" once you are in the parent folder or subfolder that you wish to create the applicable subfolder. Enter the name of the subfolder and then decide if documents uploaded into this subfolder require document approval.



You may re-name, move or delete a folder at any time by selecting the folder and then clicking the desired actions on top. Please note that you may not delete a folder if it has files in the folder. You must first delete or move the files to another folder.



## Managing Files



You may upload one or more files by clicking upload files and then either dragging a group of selected files from your windows explorer into the box or you may select them all at once from your hard drive using Ctrl click. Once completed, the files will be uploaded and the completion status may be viewed at the bottom right hand of the screen.

Please note that when you upload files into a folder that does not required approval process, these files are available to all the applicable managers instantly without editing the properties of each file. However, you may still choose to edit each file's properties to add key words, titles and other specific information (see editing file information).

When you upload files into a folder that requires approval, you must then edit the properties of each file and select the approver from the list of managers with that authority (see editing file information)

Below is an example of files loaded into the Business Process Procedures/notes subfolder that does not require approval. Notice how the files are available to view (underlined link) and status of the upload in the bottom right corner.

A screenshot of a web-based file management interface. The top navigation bar includes links: "Add Parent Folder", "Print Master Document List", "Show Archive", "Upload File", "Create Folder", and a search box. The main content area shows the path "Business Process Procedures &gt; Notes". Below the path is a table with columns: "Name", "Title", "Date Modified", and "Size". The table lists three files: "FC\_6.2.2\_Training\_and\_Competency.docx (1)", "FC\_7.1\_Planning.docx (1)", and "FC\_7.2.1\_Quote Contract Review.docx (1)". Each file has a checkbox in the "Name" column. The "Date Modified" column shows dates from December 13, 2013. The "Size" column shows file sizes: 53.99 KB, 46.6 KB, and 47.08 KB. On the left side, there is a "Select Folder:" section with a list of folders: "Business Process Procedures", "Company News and Policies", "External Documents", "Flow Charts", "Form/Logs", "PruthaTech", "Reference Documents", "Tags and Stickers", "Training Material", and "Work Instructions". At the bottom right, there is a status box with a green message: "FC\_7.2.1\_Quote Contract Review.docx' file uploaded successfully..." and a progress bar showing "Progress: 100%". The footer contains copyright information: "© CIS 2013- Continuous Improvement Software - 2013- Version 1 | © TQMS Inc. | Cloud Computing at its BEST | Developed using Prutha Technologies - A Web Dev".

The example below shows us how a file was uploaded into the Management/Administration subfolder that requires approval. Notice how the file is not selectable and the warning in the file upload progress box in the right bottom corner. These files require editing.

The screenshot displays a web-based document management system. On the left, a 'Select Folders' list includes various categories like Business Process Procedures, Company News and Policies, and External Documents. The main area shows the breadcrumb path: **Business Process Procedures > Management Procedures > Administration**. Below this, a table lists files. The file 'Business Systems Manual BSM - ISO.doc' is shown with a warning icon (a blue square with a white 'X') and is not selectable. A progress box in the bottom right corner indicates that the file was uploaded successfully but requires approval from a manager before it can be downloaded. The progress bar is at 100%.

### **Note:**

If you have many files to be uploaded and you wish to upload them all at once, you could create a Parent Folder and name it drafts. The files could go into the draft folder all in one operation and then you may edit the file properties. Once they are approved, you may select groups of files and move them into their appropriate subfolder. You may find this approach helpful when dealing with many files (or not).

### **Deleting a Parent Folder**

To delete a parent folder, all subfolders and files must first be moved or deleted. Then simply click the X next to the parent folder to delete. Only the administrator and user types with this specific permission will see the delete X and can delete.

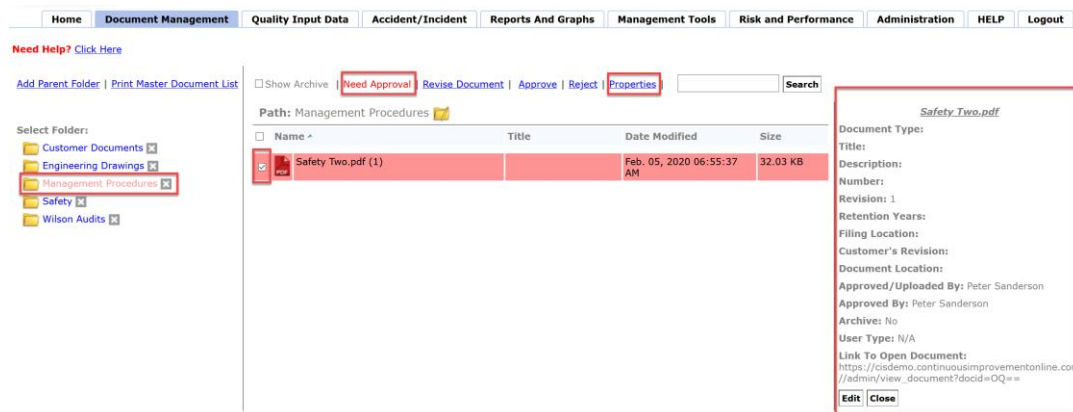
This screenshot shows the 'Document Management' section of the interface. The 'Home' and 'Document Management' tabs are visible at the top. Below the tabs, there are links for 'Add Parent Folder' and 'Print Master Document'. On the left, a 'Select Folder' list is shown with folders like Business Process Procedures, Company News and Policies, External Documents, and Flow Charts. Each folder has a small 'X' icon next to it, which is used for deleting the folder.

## Editing File Properties, Approving, Rejecting and Moving Files

### Editing File Properties

Files that were uploaded and require approval **MUST** have the properties edited. These files will be highlighted rose color and cannot be accessed other than through the approval process. Files that do not require approval do not require editing but it is best to edit their properties so to better manage the files.

To edit, click the file and then select Properties and then select edit on the right.



Once you select edit, you may enter the details for the file or document including the manager required to approve the document. Please note that the Document Types can be modified in Administration/Criteria/Document Type.

The title, a description, number, and starting revision number may be entered. If it is a form, you may also enter the retention in years of the complete forms (quality Records) and filing location. If it is a customer's file, you may enter the customer's revision and document location if the document is not electronic such as a big-old-binder.

**Note:** If the customer's file is not electronic, simply create a PDF file with the document name and put the description and location in the file. Upload the file so that it is controlled by CIS Software.

The manager selected for approving the document will have received an e-mail notification. The manager must log into CIS and click on the document which will display the approve/reject tabs on the top (see picture above). Therefore, **only the selected approver or an administrator will have access to approve the document.**

Once you decide on the approver, you may also click on user types that should be sent an e-mail notification whenever this document is revised.

**Note:** Since CIS maintains the revision numbers on the document's logs, it may not be necessary to include this information in your procedures (personal preference). If you do include this in your procedures, be very careful when loading or editing procedures so that you do not forget to change the revision number prior to uploading the procedure. If you do forget, CIS will change the revision each time you upload, so you may have to re-upload the procedure and go to the next revision.

Once the document properties are saved, CIS will assign a link to that document. The link will be displayed under user type filed (see above). This link will **ALWAYS** link to the current document, even if it is revised multiple times. The link will not change. You can highlight the link and paste it

**Safety Two.pdf**

\* Document Type:  
Select Document Type

\* Title:

Description:

\* Number:

Revision:

Retention Years:

Filing Location:

Customer's Revision:

Document Location:

Approved/Uploaded By:  
Peter Sanderson

\* Approved By:  
Peter Sanderson

Archive:  
☐

User Type:  
☐ Administrator  
☐ Customer  
☐ Manager  
☐ Supplier

Save Cancel

anywhere - in any procedure or even add it to an input form to link to a procedure such as for inspection link right in the inspection input form.

### Sample E-Mail



Dear Peter Sanderson,

This email is to notify you that **Peter Sanderson** has uploaded the document. So please login to the system to approve or reject uploaded document.

**Document Information:**

Section Name: Welding Procedures  
Document Type: QSP  
Title: Inspection  
Number: Inspection  
Date: 03/05/2010  
Revision: 1  
Uploaded By: Peter Sanderson  
Approved By: Peter Sanderson  
Retention Years: 2

***Note:** This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was sent*

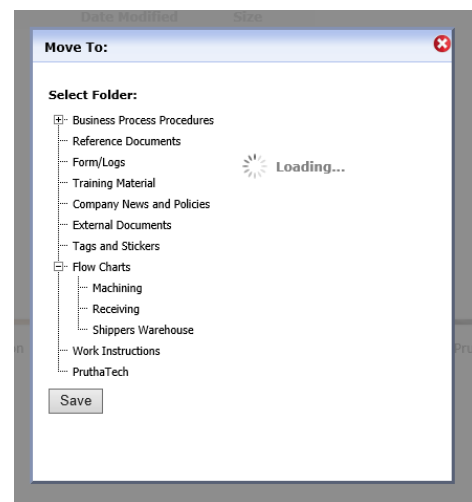
### Moving or deleting Files

Once files are approved or files that do not require approval may be moved or deleted. You may move a group of files at once by selecting them and then click "move to".

A pop-up window appears showing your folder hierarchy for you to select the folder that you want the files to be moved to. Then click save.

The files will be moved.

The same process may be used to delete. Note, only managers with delete permissions will have this option.



### Revising Documents

CIS is a dynamic loading site therefore in many instances the page needs to be refreshed before some code is completed. When dealing with files, this is often the case. For example, if you load a file then approve it and then immediately try to revise the file, it will not upload. You must either go to another page in CIS or refresh the page so that CIS will recognize the attempted revision as a revision. Also, CIS works best in these situations with a Microsoft browser such as Explorer or Edge.

CIS does work differently in this manner than the previous versions of CIS. To revise a document/file simple upload the new file by clicking Upload File in the same folder or subfolder as the file that you want to revise exists. The file **MUST HAVE THE EXACT SAME FILE NAME AS THE OLDER FILE**. When a file with the same name is uploaded, CIS will recognize it as a revision and will move the older file to the history (obsolete) folders within CIS hidden folders and place the revised (new file) in the current folder. CIS will also update the revision number.

The next step in revising a file is often forgotten but is VERY IMPORTANT!

It is required to go to the Show History section and enter the reason the document was revised. Select the revised file then click Show History (note: show history will only be displayed when selecting documents that were revised). You may then click edit and enter the paragraphs or reasons the previous document was made obsolete. Such as: (Revised Par. 3.2 after an ISO Audit)

Record has been saved successfully.

Action	Doc No	User	Procedure Approval Date	Procedure Obsolete Date	Revision Comment	Revision Number
<a href="#">Edit</a> <a href="#">View</a>	FC-7.4.2	Peter Sanderson	12/13/2013	12/13/2013	Revised as a demonstration. This is where you place revision info.	1
<a href="#">Edit</a> <a href="#">View</a>	FC-7.4.2	Peter Sanderson	12/13/2013	12/13/2013	Revised as a demonstration. This is where you place revision info.	2

**Note:** The documents in the history are all obsolete documents since the latest document is in the applicable document section. Therefore, you may want to limit access to the history section to only those managers that need access (see user access).

## Print Master List of Documents

Under Document Management there is an option on the top to print the Master document list. This will display (you may copy and paste) and it will print out a complete list of all documents and forms loaded into CIS including the obsolete procedures and forms. They are presented by Folder. You may also select to sort the documents by title or number. This is especially useful during audits to review all current and past documentation.

[Print](#) Short By: Document Title

### Master Documentation Report

#### Current Documentation:

Section: Safety

Doc Type	Doc Path	File Name	Title	Doc Number	Date Approved	Rev	Uploaded By	Approved by	Retention	Location	Archive
	Safety	AAA - Procedure for Ink Demo.pdf			11/11/2019	1	Peter Sanderson	Peter Sanderson	N/A		No
Safety	Safety	Safety One.pdf	Safety 1	S-001	09/17/2019	2	Peter Sanderson	Peter Sanderson	N/A		No
Safety	Safety	Safety Two.pdf	Safety 2	S-002	09/17/2019	4	Peter Sanderson	Peter Sanderson	N/A		No
Safety	Safety	Safety Four.docx	Safety 4	S-004	09/17/2019	1	Peter Sanderson	Peter Sanderson	N/A		No



## Quality Input Data

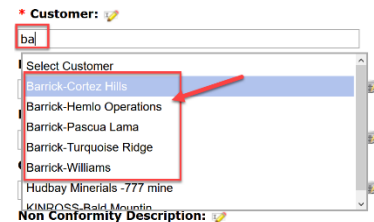
### Non-Conformity (NCR) and Near Miss

**Note:** Near miss works the same as Non-Conformity. Therefore, this is a perfect starting point to modify and revise a database to work specifically to meet your needs. For example, you may revise the terminology so to use it as a safety or accident database. A near miss is to record something that happened that came close to a failure but did not. An example would be if a 45-gallon drum fell off a pallet during movement and rolled towards the loading dock then stopped without any damage. This is a near miss because it could have resulted in an accident or damage and should be recorded in the Near Miss App. However, many organizations use the near miss database for a variety of other uses such as keeping records of accidents, environmental issues or other specific needs within the organization.

### Entering a Non-Conformity

Click on the Quality Input/Non-Conformity Reports (NCR)/NCR Details then click +New. You may enter the following information:

- Enter a Title using Key Words for Future Filters and Searches
- Select the Issue Type (quality, environmental, safety, etc.)
- Enter the date or select by clicking on the calendar icon. The default date is the current date
- Select your name from the Reported by List
- Enter the customer or supplier's name by starting to type the first few letters and then select from the list that appears below
- Enter a reference number such as bill of lading, purchase order, part number or any other useful information that will help when analyzing the Non-Conformity
- Enter a Part/Asset/Service Code or just enter N/A or leave it blank
- Enter the Quality Plan and Revision or enter N/A or leave it blank
- Describe the Non-Conformity
- Describe how you resolved the Non-Conformity (disposition). The root cause must be included in this section
- The person who determined the resolution should select their name (Resolution by) and then select the date that the resolution was determined
- Select the criteria that best describes the Non-Conformity. If no criteria are close, please advise your administrator to add this new criteria to the criteria selection list for Non-Conformity
- Select the classification
- Select the location
- Select Process/Department
- Select the product code if applicable
- Enter any costs associated with the Non-Conformity
- Enter Cost Account if applicable
- If you are creating the NCR after an inspection is performed, you may select the applicable inspection to link the NCR to the Inspection record
- If the Non-Conformity is complete, you may click the archive button. The archive button determines if the NCR is reported as complete or not on late lists. Generally, once the resolution is determined, the NCR should be archived.
- Check the Lessons Learned Button if you want it added to lessons learned
- If you want other managers to be advised of this Non-Conformity you may select them from the list. After you have selected the managers, click the check box named "send e-mail"
- If you have a pictures or files to better describe the nonconformity, you may upload them
- Enter a name for the picture or file in the Caption section
- Decide if a Corrective Action should be issued. In general, a Corrective Action should be issued unless advised not to by the person responsible



The screenshot shows a dropdown menu for selecting a customer. The text "ba" is entered in the search field. The dropdown list contains the following options: "Barrick-Cortez Hills", "Barrick-Hemlo Operations", "Barrick-Pascua Lama", "Barrick-Turquoise Ridge", "Barrick-Williams", and "Hudbay Minerals -777 mine". A red arrow points to the "Barrick-Cortez Hills" option, which is highlighted in blue. Below the dropdown, the text "Non Conformity Description:" is visible.



The screenshot shows two input fields: "Caption:" and "File Name:". The "Caption:" field is empty. The "File Name:" field contains the text "Barrick-Cortez Hills". To the right of the "File Name:" field is a "Browse..." button and a small icon.

for quality management. In some instances, the problem may be part of an on-going quality objectives improvement program (see quality objectives)

- Finally, when you are satisfied with your report, click the insert button. The following actions will occur:
  - CIS will ask if you want a work order issued (see work orders)
  - CIS will save the record and associate any pictures with the record
  - If a new Corrective Action was selected, CIS will immediately open a new Corrective Action record and link the two records together and autocomplete the description in the CAR. The CAR will then be ready to complete. See Corrective Action

## Edit, Delete, Archive, and View Files of a Non-Conformity Record

Click on Quality Input/Non-Conformity Reports (NCR)/NCR Details then select NCR that you wish to revise. Once selected, you may click edit on top to revise the record. Additionally, you will have the option to view the files uploaded, delete or archive the record. Also note that when the NCR is linked to a CAR or Work Order or from an Inspection that the link is displayed on top with the record number once the NCR is selected.

**Notes:** Archiving records will maintain the record in the database, but the archived records will not display in the NCR Details and will be removed from the action items. This helps simplify the review and working with these records since after a few months, there may be too many NCRs in the details log. You can select and archive multiple records at once.

You may still view archived records by selecting the Show Archived Box on the top on the NCR Details.

Issue Type: Select Issue    Reported By: Select Reported By

Criteria: Select Criteria    Classification: Select Classification

Show Archived: ☐    Companies: ☐ 100, Chemin du Lac Mourier  
☐ 1350 Government Road West  
☐ Agnico Eagle-Kittila  
☐ ADDETON MTL

Search In: All    Submit

## Printing NCR

You also may print one or more NCR records by selecting print. An additional report for NCR summaries is also available by selecting Print Management Summary. Here you may select one customer or a group of customers to print. This is an excellent summary report when an overview of performance by customer is required. There is a similar report in the Customer Feedback App to provide a complete customer performance picture.

Home    Document Management    Quality Input Data    Management Tools    Work Orders    Sales And Marketing    Logout

From: 12/13/2012    To: 12/13/2013

Submit

Non-Conformity Reports(NCR)    NCR Details  
Customer Feedback    Print NCR Records  
Corrective Action Request(CAR)    Print Management Summary  
Near Miss  
Preventive Action  
Inspection

Sort By: Date

NCR ID	Date	Customer Name	Non Conformity Report Description	Non Conformity Report Resolution
85	11/20/2013	CIS Customer 2	test	test
81	10/16/2013	Mehul	Non-Conformance Report/Non-Conformance Accounting Reports	Non Conformity Report Resolution
82	10/16/2013	Neel	Non-Conformance Report/Non-Conformance Accounting Reports	Non Conformity Report Resolution
77	10/11/2013	Mehul	The uniPoint Non-Conformance module offers the ability to manage the life-cycle	The status of non-conformance resolution as well as the effect of rework
78	10/11/2013	Mehul	The uniPoint Non-Conformance module offers the ability to manage the life-cycle	The status of non-conformance resolution as well as the effect of rework
79	10/11/2013	Mehul	No Need to Define NCR Description	No Need To Define NCR Resolution

**Helpful Hint:** Remember to edit your print template. Below is an example of a Print template that was modified for printing NCR Records (see editing templates).

**YOUR LOGO TEXT**  
You LOGO Will Appear on Reports & Forms

**NON CONFORMANCE REPORT**

VENDOR	PART NUMBER	REFERENCE	NCR NUMBER
CIS Customer 2	L-ISOLEUCINE	bod6777	16
LOCATION	CRITERIA	CLASSIFICATION	
PL2 WH	Product Labeling (\$100.00)	Major	
DESCRIPTION			
Product labelling was incorrect for the product.			
RESOLUTION DESCRIPTION	RESOLUTION TYPE	MRB RPR <input type="checkbox"/> EAL <input type="checkbox"/>	MRB RWR <input type="checkbox"/> SCR <input type="checkbox"/> RTV <input type="checkbox"/> INT <input type="checkbox"/>
ACTIVITIES SUMMARY			
MATERIAL USE	TRACKING NUMBER	APPLICABLE SPECS	
For information required for bench stock (Bk. Bombers, belts, nuts, center pins, etc.)			
REPORTED BY	DATE	RESOLUTION COST	CAR ASSIGNED
PRELIMINARY REV	DATE	MRB QUALITY	MRB ENGINEERING
MFG Buyoff stamp & date, work perform meets MRB requirements & all data is documented in Activities Summary		QA Buyoff stamp & date, verify work perform meets MRB requirements, all required data is recorded herein	

NOTE: This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was printed.

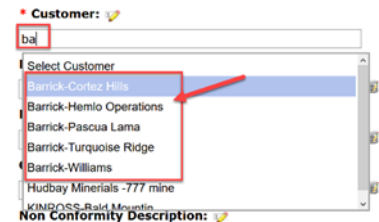
Form 24-01

## Customer Feedback (Complaint) (CF)

### Entering a Customer Feedback

Click on the Quality Input Data//Customer Feedback/CF Details then click +New. You may enter the following information:

- Enter a Title using Key Words for Future Filters and Searches, Select the Issue Type (quality, environmental, safety etc.)
- Enter the customer or supplier's name by starting to type the first few letters and then select from the list that appears below
- Select your name or the owner of the Customer Feedback from the Select Owner List
- Enter the employee who received the complaint
- Enter how the complaint was received. For example, by fax, phone, e-mail, audit, in person, sales call, etc.
- Enter the customer contact that initiated the complaint
- Enter the date or select by clicking on the calendar icon. The default date is the current date
- Enter a reference number such as bill of lading, purchase order, part number or any other useful information that will help when analyzing the Non-Conformity
- Describe the Customer Feedback. Include the root cause whenever possible
- If the customer feedback is related to a supplier and you wish to issue a supplier corrective action report directly, click the send e-mail Supplier Corrective Action Request and select the supplier. CIS will send the supplier a Corrective Action Request with the information describing the issue. (see Supplier Corrective Action Request form below)
- Select the number of units impacted
- Select the criteria that best describes the Customer Feedback. If no criteria are close, please advise your administrator to add this new criteria to the criteria selection list for Customer Feedback
- Select the location
- Select Process/Department
- Select the product code if applicable
- Describe how you resolved the Customer Feedback (disposition). The root cause must be included in this section
- Enter any costs associated with the Customer Feedback
- Decide if a Corrective Action should be issued. In general, a Corrective Action should be issued unless advised not to by the person responsible for quality management. In some instances, the problem may be part of an on-going quality objectives improvement program (see quality objectives)
- If the Customer Feedback is complete, you may click the archive button. The archive button determines if the CF is reported as complete or not on late lists. Generally, once the resolution is determined, the CF should be archived
- Check the Lessons Learned Button if you want it added to lessons learned
- If you want other managers to be advised of this Customer Feedback, you may select the managers for CIS to send an e-mail notification
- If you have a picture or file to better describe the Customer Feedback, you may upload them
- Enter a name for the picture or file in Caption. If you would like to add more than 4 pictures, first save (insert) the record then edits the record and upload more picture
- Finally, when you are satisfied with your report, click the save button. The following actions will occur:
  - CIS will ask if you want a work order issued (see work orders)
  - CIS will save the record and associate any pictures with the record
  - If a new Corrective Action was selected, CIS will immediately open a new Corrective Action record and link the two records together and autocomplete the description in the CAR. The CAR will then be ready to complete. See Corrective Action



**Add Customer Feedback** [Cancel](#) [Go Back](#)

\* Indicates required field

CF ID: New CF

Title:

\* Issue Type:

\* Customer:

\* Select Owner:

\* Employee Received Feedback:

\* How Feedback Received:

\* Customer Contact:

\* Customer Feedback Date:

Reference:

Customer Feedback Description:

Send E-Mail Supplier Corrective Action Request: ☐

Select Supplier to Issue SCAR: ☐ Supplier 1 ☐ Supplier 2 ☐ Supplier 3

Number of Units Impacted:

\* Feedback Criteria:

Location:

Process/Department:

Product Code:

Customer Feedback Resolution:

\* Resolution Cost:

Corrective Action Required:

Archive Flag: ☐

Add to Lessons Learned: ☐

Select Manager: ☐ Adams, Michael ☐ Ali, Wail ☐ Allen, Daniel ☐ Andrews, James ☐ Andrews, Kent ☐ Babb, Luke ☐ Bacco, Craig ☐ Badders, Brian

Send E-mail Notification to Manager(s)?: ☐

File Name:

[Insert](#) [Cancel](#)

## Editing a Customer Feedback

Select the Customer Feedback that you want to edit then the edit option will appear on the top. Note, only one record may be selected for editing.

Issue Type:  Owner:  Criteria:  Location:  Product Code:

Show Archived: ☐ Company:

Search In:  [Submit](#)

[New](#) [Edit](#) [Delete](#) [Archive](#) [View Uploaded files](#) [Work Order ID: 0](#) [Sort By: Customer Feedback Date](#) [Total Records: 2](#) [Items Per Page: 25](#)

☐ ☒ **Customer Feedback Information**

ID: 2  
Issue Type: Quality  
Customer: Customer  
Feedback Criteria: Late Delivery  
Select Owner: Derek Tahamont  
**Product Info**  
Reference:  
Location: Russell-1  
Product Code: Rubbers  
Resolution Cost: 0.00

## Archiving Customer Feedback (Customer Feedbacks)

Select one or more records to archive and the archive option will appear on top. You may still view archived records by selecting the Show Archived Box on the top on the CC Details.

The screenshot shows the top navigation bar with buttons: New, Delete, Active, and Archive. The 'Archive' button is highlighted with a red box. Below the navigation bar, there is a table of Customer Feedback records. The first three records are visible, each with a checkbox in the left margin. The first record (ID: 18) has its checkbox checked. The second record (ID: 19) has its checkbox checked. The third record (ID: 13) has its checkbox checked. The table columns include: Customer Feedback Information, ID, Issue Type, Customer, Feedback Criteria, Select Owner, Product Info, Reference, Location, Product Code, and Resolution Cost.

Customer Feedback Information	ID	Issue Type	Customer	Feedback Criteria	Select Owner	Product Info	Reference	Location	Product Code	Resolution Cost
<input checked="" type="checkbox"/>	18	Quality	Peter Sanderson	HACCP/Food Safety	Peter Sanderson	Reference: 6556 Location: Plant 1 Product Code: Canned Peas Resolution Cost: 0.00				
<input checked="" type="checkbox"/>	19	Quality	Peter Sanderson	Packaging Complaint	Peter Sanderson	Reference: test Location: Plant 3 Product Code: Resolution Cost: 0.00				
<input checked="" type="checkbox"/>	13	Quality	Mehul	Poor Condition on Arrival	Bretta Kelly	Reference: Reference Location: IT Department				

## Printing Customer Feedback

You also may print one or more CF records by selecting print. An additional report for CF summaries is also available by selecting Print Management Summary. Here you may select one customer or a group of customers to print. This is an excellent summary report when an overview of performance by customer is required.

The screenshot shows the CIS interface. The top navigation bar includes: Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools, and Work. The 'Quality Input Data' menu is open, showing options: Non-Conformity Reports(NCR), Customer Feedback, Corrective Action Request(CAR), Near Miss, Preventive Action, and Inspection. The 'Customer Feedback' option is selected, and a sub-menu is open showing: CF Details, Print CF Records, and Print Management Summary. The 'Print CF Records' option is selected. The interface also includes a search bar, a 'Submit' button, and a bottom navigation bar with buttons: New, Delete, Active, Archive, Sort By: Customer Feedback Date, Total Records: 10, and Edit.

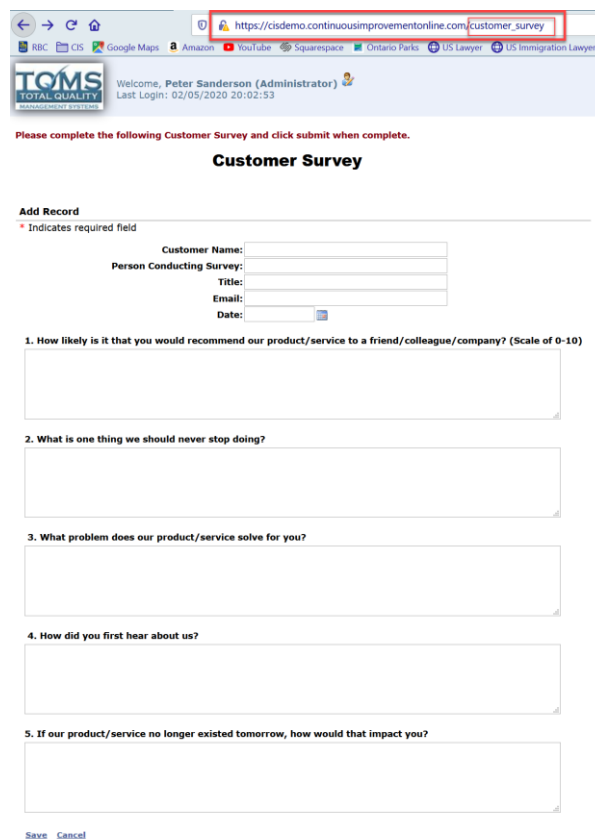
## Customer Survey

The customer survey database table includes a customer portal. A portal is an input screen that is not within the secure login environment and can therefore be accessed by anyone using a browser and following a link to the portal. Therefore, you may use this link on your web page, in an e-mail or a letter to your customers requesting input into your services. The Customer Survey includes five simple questions and when completed online will be sent by e-mail to the selected managers in your organization. See criteria in Administration to set these managers.

The link will be the link to your CIS system followed by “/customer\_survey”.

Example, if my link to CIS is <https://cisdemo.continuousimprovementonline.com> then the link to the customer survey portal will be [https://cisdemo.continuousimprovementonline.com/customer\\_survey](https://cisdemo.continuousimprovementonline.com/customer_survey).

### Customer Survey Portal Form



The screenshot shows a web browser window with the address bar displaying [https://cisdemo.continuousimprovementonline.com/customer\\_survey](https://cisdemo.continuousimprovementonline.com/customer_survey). The page header includes a TQMS logo and a welcome message for Peter Sanderson (Administrator) with a last login time of 02/05/2020 20:02:53. Below the header, a red instruction reads: "Please complete the following Customer Survey and click submit when complete." The main title is "Customer Survey". Under the heading "Add Record", there is a note: "Indicates required field". The form contains several input fields: "Customer Name:", "Person Conducting Survey:", "Title:", "Email:", and "Date:". Below these are five numbered questions, each followed by a large text area for the answer:

1. How likely is it that you would recommend our product/service to a friend/colleague/company? (Scale of 0-10)
2. What is one thing we should never stop doing?
3. What problem does our product/service solve for you?
4. How did you first hear about us?
5. If our product/service no longer existed tomorrow, how would that impact you?

At the bottom of the form, there are "Save" and "Cancel" buttons.

The administrator or your CIS Consultant may help change, modify or add questions to the survey. Also, a portal can only save data into your CIS System and the people/organizations with the link CAN NOT access your CIS System.

Once the manager receives e-mail notification of that the survey was completed they can review the survey under Quality Input Data/Customer Feedback/Customer Survey and then select their name as reviewer, enter their comments, date reviewed, and select the customer from the customers entered in CIS.

**Edit Record**

\* Indicates required field

Customer Name: Test Customer Name  
 Person Conducting Survey: Person Conducting Survey  
 Title: Title  
 Email: Email@Email.com  
 Date: Jul. 11, 2019

1. How likely is it that you would recommend our product/service to a friend/colleague/company? (Scale of 0-10)  
 Question 1 Answer

2. What is one thing we should never stop doing?  
 Question 2 Answer

3. What problem does our product/service solve for you?  
 Question 3 Answer

4. How did you first hear about us?  
 Question 4 Answer

5. If our product/service no longer existed tomorrow, how would that impact you?  
 Question 5 Answer

Manager Reviewed: Select Manager...

Comments:

Date Reviewed:

Select Customer: Select Customer

Save Cancel

## Corrective Action Requests (CAR)

### Corrective Action (CAR) Overview

A Corrective Action may be entered as a result of Non-Conformity or Customer Feedback or a Corrective Action may be entered directly as a result of management observation. However, please note that Corrective Actions that are entered directly without an association with a Non-Conformity or Customer Feedback will not be reflected in the graphical charts (see charts).

### Entering a Corrective Action Request

The Corrective Action Add Record Input Form will be created and displayed after entering an NCR, CF or NM and a new Corrective Action was selected immediately after the Save button is clicked. However, to enter a Corrective Action directly without linking it to an NCR, CF or NM, click on the Corrective Action Panel then click on add CAR. You may enter the following information:

- Enter a Title using Key Words for Future Filters and Searches
- Enter the date or select by clicking on the calendar icon. The default date is the current date
- The due date will appear
- Process/Department
- Enter the location
- Select the manager responsible to resolve the Corrective Action from the List of managers
- Enter how the Corrective Action resulted. For example, internal audit, NCR, CF or NM, etc.
- Enter the NCR, CF or NM number that should be linked to this Corrective Action. If the Corrective Action is a direct result of a Non-Conformity or Customer Feedback, select the last NCR, CF or NM number from the selected list since the NCR, CF or NM record was just created and saved. However, please note that there are two fields (NCR, CF or NM ID number). One or both fields must be "None". You cannot link the Corrective Action record to an NCR, CF and/or NM



- Once you enter an NCR, CF or NM number, the description from the NCR, CF or NM will be placed in the Corrective Action description. However, if this is a direct entry without a link to an NCR, CF or NM, you must enter the Corrective Action Request Description
- You may then scroll down to the bottom of the form and go to the Select Managers to send e-mail. You may select one or more managers in addition to the manager responsible to be notified of this Corrective Action request by holding down the Ctrl button and clicking on each manager's name
- If you have a picture or file to better describe the Corrective Action, you may upload them
- Enter a name for the picture or file in the caption area. If you would like to add more pictures, first save the record then edit the record and upload another picture
- Finally, when you are satisfied with your report, click the save button. The following actions will occur:
  - CIS will ask if you want a work order issued (see work orders)
  - CIS will save the record and associate any pictures with the record
  - CIS will immediately send out via e-mail a notification of the Corrective Action request to the manager responsible and any other managers that you selected to receive the e-mail
  - CIS will also advise managers when a Corrective Action is not resolved past the due date. The Corrective Action due date is set as a company standard by the administrator. It may be 30-days, 45-days or 5-days. Contact the administrator for clarification of the time allowed resolving a Corrective Action

Add CAR Cancel Go Back											
* Indicates required field											
CAR ID: New CAR											
* CAR Date:	02/05/2020										
CAR Due Date:	02/07/2020										
Title:											
Issue Type:	Select Issue										
Process/Department:	Select Process/Department										
Location:	Select Location										
* Person Responsible:	Select Person Responsible										
Resulting From:											
* NCR Number:	None										
* CF ID:	None										
* NM Number:	None										
* Problem Description:											
<table border="1"> <thead> <tr> <th>Why</th> <th>Answer</th> <th>Is This Root Cause?</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>YES</td> <td></td> </tr> </tbody> </table>				Why	Answer	Is This Root Cause?	Action			YES	
Why	Answer	Is This Root Cause?	Action								
		YES									
Root Cause: Immediate Correction (Containment): Eliminate Cause/Action to Prevent Recurrence: Resolved Date: Resolution Prepared By: Resolution Cost: \$0.00 Resolution Verified Date: Implementation/Resolution Verified By: Describe Verification Performed: Date for Follow-up Review of Effectiveness: Manager Responsible for Follow-Up: Corrective Action Closed Flag:											

### Archiving and Filtering Corrective Actions

Corrective actions may be archived in the same manner as Non-Conformity and Customer Feedbacks by selecting the record or group of records and clicking the archive option.

However, in addition to archiving, you may also display the records by using a filter as follows:

1. Corrective actions resolved
2. Corrective actions not resolved
3. All Corrective actions

## Manager's Responsibility for Editing (resolving) a Corrective Action

Once a manager receives a Corrective Action request notification by e-mail, the manager may click the link to the record in the e-mail notification or log on to the CIS and go to the applicable CAR. Find the applicable Corrective Action Request from the log that you wish to resolve then select it and click edit on the top. You may edit any of the fields, add information that became available after the fact and/or upload additional pictures. However, the following information must be entered by the manager:

- Use the 5-Whys option to determine the Root Cause (see below)
- Enter the root cause and the actions taken to resolve the Corrective Action request and ensure that it will not be repeated. This may include a revision to a procedure, training, purchase of new equipment etc.
- Enter the immediate action(s) taken to address the present situation (containing the problem)
- Enter the actions taken to prevent reoccurrence
- Enter the resolved date that the actions will be completed
- Enter the manager who approved the resolution (normally the manager selected as responsible when the record was created)
- Enter any costs associated with the actions and resolution of the Corrective Action
- Enter date that the actions are verified and by whom
- CIS then allows to enter the results of the verification and then to plan a long-term follow-up verification for continued effectiveness. For example, you may close the CAR with a follow-up in 6-months. This date will appear as an action on the calendar and on the manager's action list. The follow-up should be performed and recorded in the CAR record
- Click the insert button

Why	Answer	Is This Root Cause?	Action
Was the driver on the phone	No	NO	<input type="checkbox"/>
Was the driver distracted?	No	NO	<input type="checkbox"/>
Was the driver fully trained and certification current?	Yes	NO	<input type="checkbox"/>
Were the aisles clean and clear of clutter to make it easy to navigate?	No, it was during a process of loading and unloading where the driver had very little maneuvering room.	YES	<input type="checkbox"/>

Root Cause: 📎

it was during a process of loading and unloading where the driver had very little maneuvering room.

## Root Cause Instructions

### Correction of Nonconformance

For the purposes of the response, this information will define what action was taken to address the nonconformance itself. If the CAR identified that records were not being completed as required by a procedure, then the correction will be the implementation of a process so that the records are being completed. The response will then provide objective evidence that the records are being completed. If the CAR identified that a procedure is not being followed for a defined activity such as

updating a procedures manual when revised procedures are issued, then the correction will be to follow the procedure by updating the procedure manual. The response will then provide objective evidence that the procedure manual has been updated.

### **Results of the Investigation of Cause**

In conjunction with taking action to correct the nonconformance, a determination of *why* the nonconformance occurred within the control points defined by the quality system is needed. This analysis requires the collection of objective evidence (Opinions are not objective evidence) related to the identified issue. During the collection of this information, there will be situations identified which are themselves nonconformance such as “person did not follow procedure” or “person did not understand the requirement”. These descriptions by themselves are not the cause. The cause will identify the *reason why* these system requirements were not met. The 5-Why Table System in the Corrective Action Record is an excellent method of determining the root cause. The result of the investigation could be a statement as follows. “Interviews with four other Inspectors showed they were also not following the procedure as written. The change in the test frequency, included in the May 12, 1996 revision, was not understood as to which customers required it. Since there are no defined methods in the Document and Data Control Procedure for ensuring effective implementation of revised requirements, this discrepancy was encountered.”

### **Remember that the results of the investigation of cause should include:**

The information collected during the investigation and may include the timeframe that the investigation results show the condition existing including the event (procedure revision, transfer to new position, installation of new equipment, etc.) that relates to the start of the concern, Reference to the system control point that was defined or should have been defined to prevent the issue from occurring.

### **Corrective Action Plan**

Once the cause of the nonconformance has been analyzed, the decision on implementing action to eliminate that cause will be made. The CAR Response should include a record of that decision including the actions to be taken, if any, and the implementation timeframe. For the situation described above, a Corrective Action would be made in defining a method in the Document and Data Control Procedure for follow-up to ensure implementation of revised requirements. The plan would define who and when for defining this method and the communication/training requirements for other personnel in the system. Remember that the Corrective Action is intended to prevent recurrence of the issue due to the assigned cause. If there are any potential causes identified during the investigation, these should be addressed through the Preventive Action procedure which defines how subjective evidence is used to implement changes to the system. Any plans for Preventive Action do not have to be included in the CAR Response.

### **ISO Facilitator's (Quality Manager's) Responsibility to Close the Corrective Action**

The ISO Facilitator must periodically review the Corrective Action Details Log. It is best to sort the log in ascending order by Corrective Action Closed Flag. This will group the Corrective Actions by their closed or not closed status.

The ISO Facilitator shall review all Corrective Actions that are not closed and determine which ones have the resolution entered by the responsible manager. The ISO Facilitator shall review each of the completed resolutions and determine the following:

- The resolution is acceptable and will be an effective method to prevent the issue from re-occurring, or
- The resolution is not acceptable.

If the resolution is not acceptable, the ISO Facilitator shall make a note to this effect and the reason why in the resolution field (add to the manager's resolution) and Insert the record. CIS will automatically send out a notification e-mail to all the Managers selected when the record was created, and they will then be notified that the resolution was not accepted. The manager responsible should then re-evaluate the resolution and determine a better solution to prevent the issue from re-occurring.

If the resolution is acceptable, the ISO Facilitator shall verify if the resolution was implemented as described and accepted. When the resolution is implemented and may be verified, the ISO Facilitator shall enter the following:

- Resolution Verification date (resolution accepted)
- Verification of Effectiveness by (resolution accepted)
- Final Verification Date (date resolution implemented by final verification)
- Check if this issue should be added to lessons learned
- Click the closed flag to close the Corrective Action

**Note:** Until the Corrective Action closed flag is clicked, CIS will continue to follow-up to managers by sending reminder e-mails to all the managers selected when the Corrective Action is past due.

<b>Resolution Cost:</b>																	
\$0.00																	
<b>Resolution Verified Date:</b>																	
<b>Implementation/Resolution Verified By:</b>																	
<b>Describe Verification Performed:</b>																	
<b>Date for Follow-up Review of Effectiveness:</b>																	
<b>Manager Responsible for Follow-Up:</b>																	
Select Manager...																	
<b>Corrective Action Closed Flag:</b>																	
<input type="checkbox"/>																	
<b>Date Follow-up Performed:</b>																	
<b>Results of Follow-up Review of Effectiveness:</b>																	
<b>Select Managers to send Email:</b>																	
<table><tr><td><input type="checkbox"/> Adams, Michael</td><td><input type="checkbox"/> Ali, Wail</td><td><input type="checkbox"/> Allen, Daniel</td><td><input type="checkbox"/> Andrews, James</td></tr><tr><td><input type="checkbox"/> Andrews, Kent</td><td><input type="checkbox"/> Babb, Luke</td><td><input type="checkbox"/> Bacco, Craig</td><td><input type="checkbox"/> Badders, Brian</td></tr><tr><td><input type="checkbox"/> Baldwin, Jason</td><td><input type="checkbox"/> Bertrand, Meredith</td><td><input type="checkbox"/> Blake, William</td><td><input type="checkbox"/> Bollig, Kyle</td></tr><tr><td><input type="checkbox"/> Brech, Edward</td><td><input type="checkbox"/> Call, Troy</td><td><input type="checkbox"/> Caprio, James</td><td><input type="checkbox"/> Caroselli, Kari</td></tr></table>		<input type="checkbox"/> Adams, Michael	<input type="checkbox"/> Ali, Wail	<input type="checkbox"/> Allen, Daniel	<input type="checkbox"/> Andrews, James	<input type="checkbox"/> Andrews, Kent	<input type="checkbox"/> Babb, Luke	<input type="checkbox"/> Bacco, Craig	<input type="checkbox"/> Badders, Brian	<input type="checkbox"/> Baldwin, Jason	<input type="checkbox"/> Bertrand, Meredith	<input type="checkbox"/> Blake, William	<input type="checkbox"/> Bollig, Kyle	<input type="checkbox"/> Brech, Edward	<input type="checkbox"/> Call, Troy	<input type="checkbox"/> Caprio, James	<input type="checkbox"/> Caroselli, Kari
<input type="checkbox"/> Adams, Michael	<input type="checkbox"/> Ali, Wail	<input type="checkbox"/> Allen, Daniel	<input type="checkbox"/> Andrews, James														
<input type="checkbox"/> Andrews, Kent	<input type="checkbox"/> Babb, Luke	<input type="checkbox"/> Bacco, Craig	<input type="checkbox"/> Badders, Brian														
<input type="checkbox"/> Baldwin, Jason	<input type="checkbox"/> Bertrand, Meredith	<input type="checkbox"/> Blake, William	<input type="checkbox"/> Bollig, Kyle														
<input type="checkbox"/> Brech, Edward	<input type="checkbox"/> Call, Troy	<input type="checkbox"/> Caprio, James	<input type="checkbox"/> Caroselli, Kari														
<b>Archive Flag:</b>																	
<input type="checkbox"/>																	
<b>Add to Lessons Learned:</b>																	
<input type="checkbox"/>																	
<b>Caption:</b>	<b>File Name:</b>																
	Browse... No files selected.																

## **Corrective Action Notification E-mails**

CIS will send out the following e-mails or CIS notifications to CIS Personal mail:

1. Initial notification of a Corrective Action request sent to all managers selected when the Corrective Action was created
2. Record modified notification when a Corrective Action record was edited or added to send to all managers selected when the Corrective Action was created
3. Late reminders when a Corrective Action is not closed and is past due is sent to all managers selected when the Corrective Action was created and any additional managers that were selected in the preference section by the administrator when setting up the CIS software

**Note:** The administrator can select additional managers such as the President to be notified by e-mail when a Corrective Action is not resolved in the agreed time limit set by the administrator. This set-up is performed by the administrator and is under the preference section (only available to administrators). Managers and users will not have access to the administrator's panels such as preferences.

### **Sample of Default Corrective Action Late E-Mail**

*Remember, these e-mails can be edited to be more meaningful to your organization.*

[LOGO]

This email is a reminder from the Continuous Improvement Software System. The following Corrective Action Request #[CARID] has not been resolved and is now PAST DUE. If you are in the process of investigating the Corrective Action, please make a note in the record indicating when the issue will be resolved.

[VIEWLINK]

### **Corrective Action Request Information**

CAR ID Number: [CARID]

Manager Name: [NAME]

## **Inspection**

### **Safety Walk-Through**

The safety walk-through is to be used for periodic safety walk through inspection of the facilities. The questions may be edited by your Administrator or CIS consultant. The Safety Walk-Through is under Quality Input Data and then Inspection. Click new to create a walk through. The form is very friendly to windows tablets or I-Pads.

For each walk-through you can select the location, the manager performing the inspection and the date. Then for each question you may select the status (acceptable, opportunity for improvement...), upload a picture and then enter the findings or comments.

Add Record

\* Indicates required field

Manager Performing Inspection: Select Manager...

Date: 02/05/2020

Location: Select Location

1. Are all exits and entrances marked and lighted? Is there emergency lighting if power fails?

Acceptable

Browse... No file selected.

Comments:

At the end of the form you select one or more managers to be notified **IF** improvement is required. When selecting Yes to improvement required, CIS will send out an e-mail notification to the selected managers. The applicable managers are expected to address the issue(s) and then complete the walk-through report by entering their name, date, comments, materials used and hours.

Improvement Required?: ☐ Yes ☐ No

Assign To:

☐ Select Manager...

☐ Ali, Wail  
☐ Andrews, James  
☐ Babb, Luke  
☐ Badders, Brian  
☐ Bertrand, Meredith  
☐ Bollig, Kyle  
☐ Call, Troy  
☐ Caroselli, Kari  
☐ Casey, Dalton  
☐ Chartier, Tara  
☐ Claudio, Emilio  
☐ Cockley, Robert  
☐ Cosma, Carlos

☐ Adams, Michael  
☐ Allen, Daniel  
☐ Andrews, Kent  
☐ Bacco, Craig  
☐ Baldwin, Jason  
☐ Blake, William  
☐ Brech, Edward  
☐ Caprio, James  
☐ Carson, David  
☐ Cavender, Phillip  
☐ Chojnowski, John  
☐ Clements, Tanya  
☐ Cook, Phillip  
☐ Croskey, Nancy

Completed By: Select Manager...

Date Completed:

Comments:

Hours:

Materials:

Save Cancel

## **Inspection Overview**

The Inspection is intended to record product inspections such as receiving, in-process and final inspection. Additionally, there is an option to receive products and have them entered automatically into the inventory management system. The inspection input form may include pictures and/or uploaded inspection reports. However, we recommend that you use the snippet feature in the Inspection Result memo field to create different inspection requirements for each product or service.

An example of an inspection snippet:

New		Sort By
<input type="checkbox"/>	Name	Content
<input type="checkbox"/>	Receiving Metal	Master Heat Certificate: Hardness: Lbs Received: Test Bars Received: Stamping and Labels:

When the inspector is completing the inspection input form, the appropriate snippet may be selected and then the results may be added. This reduces input time and ensures that all the required results are recorded.

CIS can send out an e-mail notification requesting instructions for rejected product or services to the supplier, customer or to a department in the organization. This e-mail notification serves two purposes:

- 1- Advise people of the rejection and
- 2- Request input or instructions

When the Inspection record is created and “send e-mail” is selected, an e-mail will be sent to the customer or supplier and to the responsible manager selected in the record. This will reduce the time required to communicate the rejected product or service within the company and then to communicate the rejection with the customer or supplier. CIS will also maintain records, pictures and reports uploaded of all Inspections and will chart them per month in the charts section. The inspection will always send a notification to the Responsible Manager, even if the send e-mail (to the customer/supplier) is not selected.

### **Hint to advise Multiple Managers:**

If you want multiple people within your organization to be advised of inspection failures, set-up a new user and give the user a name such as “Incoming Inspection Task Force” or “Final Inspection Task Force”. This user should have manager permissions and you may add multiple e-mail addresses in the e-mail section of the user records. Once set-up in this manner, use this selection as responsible manager and do not select the send email check box if you want the task force to receive notification and not the customer or supplier selected.

## **Entering Inspection Results**

Click Quality Input Data/Inspection/Inspection Details. You may enter the following information:

- Select the Issue Type (quality, environmental, safety, etc.)
- Select the Type of Inspection (Incoming, Incoming to Inventory\*\*, In process or Final),
  - When selecting Incoming to inventory a Part selection box will appear further down (under Product Number) that allows you to select the products received from a list of products, enter the quantity and location in inventory and then select add to inventory. For products to be selectable the products must first be entered in the product database (See Product Database in Vendors Section)

*Part	Description	Transaction\Location Note	*Quantity	Add to Inventory	Action
Computer Processor	Computer Processor		0	<input type="checkbox"/>	

- You may add multiple items by clicking the Action + button to add another item. These items entered will be added to inventory. Note, this box only appears when selecting Incoming Inspection to Inventory. Additionally, if product that was not entered into the inventory list of selectable items is received, you may receive it under MISC and enter the description
- Select the customer or supplier from the customer/supplier selectable list
- Enter the transportation company if it was received at incoming inspection. By recording the transportation company, you may later sort the table records by Transportation Company to see the quantity of received damaged products from a particular transportation company. If the inspection is an in-process inspection of product received from a subcontractor such as heat treating or machining, you may want to enter the subcontractor's name,
- If you want the customer or supplier to be advised, click the “send e-mail” click box. Once you check the send e-mail box, a choice of e-mail templates will be presented.  
There are five different templates to select from for the supplier as well as five for the customer. It is important that you review each template and you may customize the templates for specific purposes (see customizing e-mail notifications). The employees performing the inspection should be well trained on these templates and which template to select for specific purposes. We recommend that this is clearly outlined in your inspection procedures. As an example, we could use the e-mail templates as follows (there are duplicate e-mails available to select for Suppliers):
  - Customer Notification: Specific to customer to advise customer immediately of inspection results (pass or fail)
  - Customer In-Process Reject: Specific to customer in-process inspection reject to advise customer immediately
  - Customer Receiving Reject: Specific to customer receiving inspection reject to advise customer immediately
  - Customer Final Reject: Specific to customer final inspection reject to advise customer immediately
  - Customer Incoming Inventory Reject specific to customer received material to go into inventory that was rejected
- Select the manager responsible to resolve issues with the customer or supplier. The manager selected will also receive an e-mail notification and that manager's e-mail will be listed on the e-mail notification to the customer or supplier as the e-mail to send instructions on how to handle the damage (repair, rework, scrap, return etc...). You may also select the template to use for the responsible manager. It may not always be the same as the one you use for the customer. Again, you may customize these e-mails to suit your requirements
- Enter the date received (inspected) or select by clicking on the calendar icon. The default date is the current date
- Select the product Code
- Enter the Product
- If receiving into inventory was selected, select or enter the products received to be entered into inventory
- Enter the Batch Number
- Enter the PO #, Delivery #, BOL #, Router #, Job #, or other such identifier
- Enter the quantity received or *inspected* and then the quantity accepted and rejected
- Enter any useful comments
- If required, select the procedures used for inspection
- Enter the inspection code
- Select the inspector (yourself)
- Describe the inspection results (Remember that snippets are useful to save data entry and to provide consistent data entry results)
- If you can suggest a course of action, enter the suggested actions in the suggested disposition (this will be sent with the e-mail notification to the customer or supplier)
- If the inspection can be resolved immediately and does not require input from an NCR or customer/supplier input, you may complete the description of resolution and resolution date. Otherwise leave these blank until resolution is decided
- Enter the inspection cost (if known)
- If there is a shelf life, enter the shelf life. Note: the responsible manager will be advised 14-days before the shelf life expires by e-mail notification

Send Email:

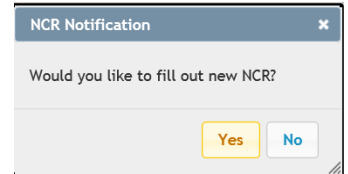
☒

Select Customer Template: Customer Receiving Reject

Select Supplier Template: Supplier Incoming Inventory Reject

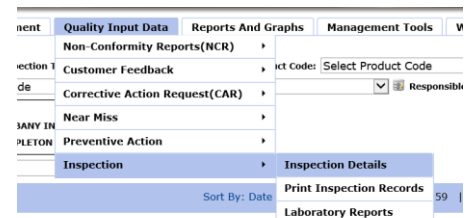


- Scroll down to the Upload Picture and if you have a picture or file to better describe the rejection such as an inspection report, you may upload them
- Enter a name for the picture or file in the caption. If you would like to add more pictures, first save the record then edit the record and upload another picture
- Finally, when you are satisfied with your report, click the Insert button. The following actions will occur:
  - You will be asked if you want to issue an NCR. If you select yes, the record will be saved, it will be linked to a new NCR and the NCR Report will be presented for you to complete. Additionally, the following actions occur:
    - CIS will save the record and associate any pictures with the record
    - CIS will immediately send out via e-mail a notification of the Rejection request to the customer (if send e-mail is selected) and to the manager responsible and any other managers that you selected to receive the e-mail



## Printing Inspection Records

You may print inspection records by clicking Quality Input Data/Inspection/Print Inspection Records and select the records to print.



## Shelf Life Reports

CIS monitors shelf life from the shelf life entered in the inspection. CIS will send the responsible manager (manager entered in the inspection) an e-mail 14-days before a shelf life expires. Additionally, there is a Shelf Life Report in Reports and Graphs:

From: 12/16/2012

To: 12/16/2013

Report

[Render](#) [Print](#)

### Material Shelf Life Expiry:

Shelf Life Date	Inspection ID	Product (Batch)	Responsible Manager
12/12/2013	68	1 (1)	Peter Sanderson

[Download Report \(.CSV\) File](#)

## Inspection Input Form

ID: New Record

Issue Type: Performance

Type of Inspection: Incoming Inspection to Inventory

Location: Select Location

Process/Department: Select Process/Department

\* Customer: 

no value in list

Transport Company:

Send Email:

Select Customer Template: Customer Receiving Reject

Select Supplier Template: Supplier Incoming Inventory Reject

\* Responsible Employee: Select Person Responsible

Select Manager Template: Customer Incoming (Vendor) Reject

\* Date Inspected: 02/05/2020

Product Code: Select Product Code

\* Product Number:

*Part	Description	Transaction\Location Note	*Quantity	Add to Inventory	Action
Misc			0	N/A	
Enter Part Name					

\* Batch/Lot Number:

\* PO #.Delivery # BOL # Router #:

\* Quantity Inspected: 0

\* Quantity Accepted: 0

\* Quantity Rejected: 0

Comment:

Procedures: Show Archive

*File Name	Version	Uploaded Date	Action
S-001	undefined		
S-002			
Dupont 1			
Dupont 3			

Inspection Code: Select Inspection Code

Inspected By: Select Inspected By

Inspection Results:

Suggested Disposition:

Date Resolved: 02/05/2020

Description of Resolution:

Resolution by:

Archive Flag:

\* Cost: \$0.00

Shelf Life date:

Caption: File Name: Browse... No files selected.

[Insert](#) [Cancel](#)

### Example of One Approach for Inspection Follow-Up and Disposition

Once CIS sends out the e-mail, the customer, supplier or in-house disposition team is expected to contact the manager by e-mail with details of how they want to proceed with the rejected product or service. In a distribution/warehousing operation, the manager responsible is normally the customer service representative. Once the customer's instructions are received, the manager may execute the instructions by issuing the proper documentation (work order, process sheet, etc.). If the inspection is an in-process and/or standard final inspection and there is a procedure to re-work the product, then reference to this procedure should be entered into the disposition resolution and the inspection closed (archived) immediately.

Once the manager receives the instructions from the customer or supplier, the manager should click the link to the record or log on to the CIS and click on the Inspection Panel then click on Inspection Details. Find the applicable Inspection record from

the log then click edit on the left column. You may edit any of the fields, add information that became available after the fact and/or upload additional pictures. However, the following information must be entered by the manager:

- Date resolved
- Description of resolution
- Resolution provided by (enter customer or supplier contact's name who sent instructions)
- Click Insert Record

**Note:** The instructions received from the customer or supplier should be filed (normally received by e-mail) or copied into the disposition memo field of the record. The e-mail may also be saved and uploaded as a document associated with the record.

Depending on the type of organization or inspection, the work order may be used to provide details of the re-work and to record the time and material and the completion date.

## Work Orders

The work order feature is an important tool and it is linked to many other Apps to initiate action or work. The work order may be used for:

1. Providing instructions after a NCR, Customer Complaint, Near Miss or Corrective Action resolution to provide re-work instructions and ensure that the rework is completed and recorded
2. To issue maintenance or repair work and record the material and man-hours
3. To issue instrument or equipment repair work outside of regular maintenance and link the work order costs to the instrument's maintenance cost report (see maintenance)
4. To issue sanitation and cleaning instructions and record the material and man-hours
5. To issue instructions to perform general work as required by a client or in-house and record the material and man-hours

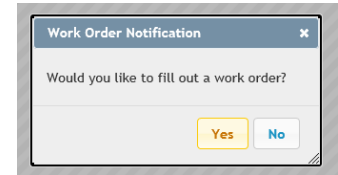
There is a work order graph that will provide man-hours for each category of work such as sanitation, re-work, maintenance, and any other category that you created in the administration (see Administration).

There are two methods to issue a work order:

1. Directly by clicking on Work Orders/Work Order Details then clicking +New:

The screenshot shows a web application interface. At the top, there is a navigation bar with tabs: Home, Document Management, Quality Input Data (highlighted with a red box), Accident/Incident, Reports And Graphs, and Management Tools. Below the navigation bar, on the left, is a 'Work Category' section with checkboxes for Maintenance, Other, and Repair. Below that is a 'Search In:' dropdown menu set to 'All'. At the bottom left, there is a '+ New' button (highlighted with a red box). In the center, a dropdown menu is open under 'Quality Input Data', showing options: Non-Conformity Reports(NCR), Customer Feedback, Near Miss, Corrective Action Request(CAR), Inspection, Work Order (highlighted with a red box), and Proposed Process/Procedure Revision. To the right of the 'Work Order' option, there is a sub-menu with 'Work Order Details' (highlighted with a red box) and 'Print Work Order'. At the bottom right, there is a 'Items Per Page:' dropdown set to '25'. Below the main content area, there is a section titled 'Work Order Information' with details: ID: 2, Requested by: Peter Sanderson, Issued To: Customer/Supplier: Barrick-Cortez Hills, Work Category: Repair, and Completed By:.

2. Indirectly by completing an NCR, CF, Near Miss or CAR and saving. Before the record is saved, CIS will ask if you want to issue a work order. By selecting yes, CIS will save the record and open an add work order screen for you:



To issue a work order, complete the information required including the instructions of the work to be performed (these would be completed automatically if a template is selected). When you complete a work order and it is to be used only once, do not select a work order template from the Load from Template field. Simply leave the field as “Load Template”.

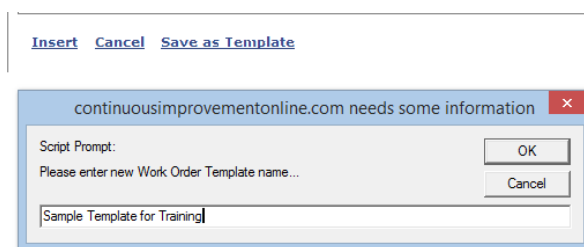
Once you have completed the following fields, you may decide to save the work order or to have the work order become a template so that you may select it in the future.

1. Requested by
2. Issued To
3. Customer
4. Work Category
5. Instrument (machine) – Used to link to the maintenance/Repair App and to Track overall equipment maintenance/repair Cost. See Calibration/Maintenance/Repair
6. Location
7. Process/Department
8. Date Issued
9. Requested Completion Date
10. Describe work to be performed
11. Decide if the work order should be sent by e-mail

When this information is complete, click insert or save as template at the bottom. Saving as a template is useful for repetitive work such as sanitation or maintenance. In fact, the template could act as the actual cleaning procedure and each time the work order is issued, the procedure would be included in the Describe Work to be Performed field.


**Note:** When you save as a template, you create a template to be used and NOT A WORK ORDER. Once you save as a template, you can then select the template when creating a new work order. In summary, you cannot create (issue) a work order and template at the same time.

If you create a template, you will be prompted to give your template a name:



**Note:** Once you have created a template, you would have to go back and +New to actually issue a work order in accordance with the template you just created.



To select a template the next time you create a work order, simply select the load template and all your information will be inserted into a new work order and you simply have to select the requested completion date:


ived: ☐ 

**Add Work Order**

\* Indicates required field

**Work Order ID:** New Work Order

**Load from Template:**    
sample template for training  [Delete](#)



\* **Requested by:** 



When the work order is saved, CIS will e-mail the work order to the applicable manager to perform the work. The manager is responsible to click the e-mail link and complete the record of work when the work is finished. There are fields to enter the hours, materials, date completed, upload pictures, or files and comments.


**Add Work Order** [Cancel](#) [Go Back](#)


\* Indicates required field



**Work Order ID:** New Work Order



**Load from Template:**    
Load Template 



\* **Requested by:**    
Select Requested by 



**Issued To:**    
☐ Curry, Kacie ☐ Daigley, Rosamaria ☐ Dames, Eric ☐ Damer, Lorrin  
☐ Davis, Lesley ☐ Demler, Cameron ☐ Derek Tahamont ☐ Dinges, Rodney  
☐ Dinges, Roger ☐ Donnellon, Robert ☐ Ducoing, Darla ☐ Dyer, Michael  
☐ Echar, Andrew ☐ Edwards, Audrey ☐ Edwards, James ☐ Einwiller, Peter  
☐ Elder, Anthony ☐ Fica, Katie ☐ Farmer, Jessica ☐ Fraga, Rose



**Customer/Supplier:** 



\* **Work Category:**    
Select Work Category 



**Instrument:**    
Select Instrument 


**Location:**    
Select Location 



**Process/Department:**    
Select Process/Department 



\* **Date Issued:**    
02/05/2020 



\* **Requested Completion Date:**    
 



**Actual Planned Completion Date:**    
 



\* **Describe Work Required:** 



**Send work order by e-mail:**    
☒ 



**Actual Completed Date:**    
 



**Completed By:**    
 



\* **Man-hours used:**    
0 



\* **Labor Cost:**    
0 



**Material Used:**    
 

\* **Material Cost:**    
0 

**Reference:**    
 

**Comments:**    
 

**Archive Flag:**    
☐ 

**File Name:**   
Caption:   No files selected.  

[Insert](#) [Cancel](#) [Save as Template](#)

## Proposed Process / Procedure Revision

The purpose of this App is to record proposed revisions to existing procedures, new procedures, or processes and to follow the review and approval process. It is an excellent depository for the work, reviews, approvals, and verifications. It also ensures training is carried out when required.

**Note:** Often when companies only require one approval for documents, they have no need for this App. However, this app allows for the proposed procedure to be uploaded and it will remain on file; approved or not. This App will provide complete records of multiple reviews, actions and due dates throughout the approval process.

To create a new proposal for a revision to a process or existing procedure or for a new procedure, click NEW under the Process/Procedure App.

The screenshot displays the 'MANAGEMENT SYSTEMS' interface. The top navigation bar includes links for Home, Document Management, Quality Input Data, Accident/Incident, Reports And Graphs, Management Tools, and Risk. The 'Quality Input Data' menu is expanded, showing options like Non-Conformity Reports(NCR), Customer Feedback, Near Miss, Corrective Action Request(CAR), Inspection, Work Order, and Proposed Process/Procedure Revision. The 'Proposed Process/Procedure Revision' option is highlighted with a red box. Below the navigation bar, there are search filters for Process Department and Search In, both set to 'All'. A 'New' button is visible. At the bottom, there is a section for 'ID: 1' with details for Process/Department, Scheduled Start Date/Time, Auditor, and Actual Audit Date.

How this input form is completed and in what order is to be determined by your management. This input is divided into 3 different action areas that are monitored under Manager's Actions and the Master Calendar. E-mails are sent out to the responsible managers when an action and due date is created in the input/edit form.

1. Final Approval Due Date
2. Actual Document/Process to be completed Due Date
3. Follow-up actions such as training Due Date

Often this form is edited frequently and documents or marked up documents may be uploaded at the bottom of the edit form. In general, the process is completed when the final verification and approvals are complete. At that point the final approved procedure may then be uploaded into the documentation App for Final Revision and Approval. If it is a revision to a process, then it is completed when the process is revised and verified.

## Proposed Process/Procedure Revision Form

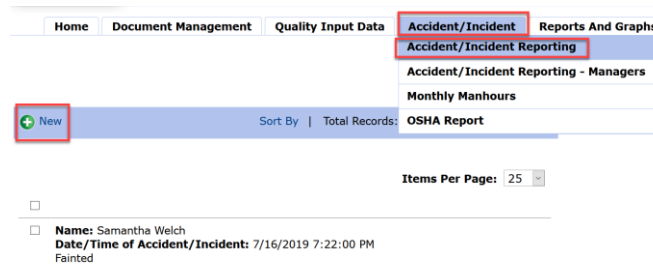
Add Proposed Process/Procedure Revision	
<span style="color: red;">*</span> Indicates required field <a href="#" style="color: blue; text-decoration: none;">Cancel/Go Back</a>	
<b>Issue Type:</b> <div style="border: 1px solid #ccc; padding: 2px;">Performance</div>	
<b>Location:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Location</div>	
<b>Process/Department:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Process/Department</div>	
<span style="color: red;">*</span> <b>Customer:</b> <div style="border: 1px solid #ccc; height: 15px;"></div>	
<b>Date:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>	
<b>Recommended By:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Recommended By</div>	
<b>Describe Proposed Revision:</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>List Applicable Procedure(s):</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>Describe Reason for Revision:</b> <div style="border: 1px solid #ccc; padding: 2px;">Please Select One</div>	
<b>Describe Additional Processes Affected:</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>Upload Suggested Revision or Procedure with Changes:</b> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <div style="flex: 1;"> <b>Caption:</b> <div style="border: 1px solid #ccc; height: 15px;"></div> </div> <div style="flex: 1;"> <b>File Name:</b> <div style="border: 1px solid #ccc; padding: 2px;">Browse... No files selected.</div> </div> </div>	
<b>Suggested Revision Reviewed By:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Date Reviewed:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Revision Approved or Rejected:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select</div>	
<span style="color: red;">**Note: If Revision Is Rejected, Skip the remaining and Check the Archive box at the bottom of this input form.**</span>	
<b>Final Approval:</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>Approved By:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Date Approved:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Manager Responsible to Execute Actions:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Due Date for Revision to be Complete:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Documents to be Revised as a Result of Revision:</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>Manager Responsible to Revise Documents:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Due Date for Revised Documents:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Follow-up Actions (Le Training) Required:</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>Manager Responsible to Follow-up:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Due Date for Follow-up Actions:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Manager Who Completed Follow-up:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Date Follow-up Completed:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Final Review and Verification:</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<b>Manager Who Completed Final Verification:</b> <div style="border: 1px solid #ccc; padding: 2px;">Select Manager...</div>	<b>Date Final Risk Conclusion Completed:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> <div style="margin: 0 5px;">/</div> <div style="border: 1px solid #ccc; width: 100px; height: 15px;"></div> </div> </div>
<b>Additional Files Upload :</b> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <div style="flex: 1;"> <b>Caption:</b> <div style="border: 1px solid #ccc; height: 15px;"></div> </div> <div style="flex: 1;"> <b>File Name:</b> <div style="border: 1px solid #ccc; padding: 2px;">Browse... No files selected.</div> </div> </div>	
<b>Revision Completed:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <input type="checkbox"/> </div>	
<b>Archive:</b> <div style="border: 1px solid #ccc; padding: 2px;"> <input type="checkbox"/> </div>	

## Accident/Incident

The Accident Incident App is designed around OSHA reporting and to report, investigate and record all incidents and/or accidents in your organization. There are two different User Controls (the way the database is accessed) in this App. One is designed for level one management such as the supervisor and/or managers to report the incidents/accidents and the other is for executive management to review, approve and comment on each Accident/Incident and to decide if it should be included in the OSHA reporting. This must be set-up properly by your administrator or consultant based on user types.

### Reporting the Incident - Step 1

When an Accident/Incident occurs, the reporting process starts with the supervisor/manager who creates a new report by selecting Add New.



The Accident/Incident report is started by completing the following:

- Incident Type
- Employee Status
- Name of Employee
- Job Title
- OSHA Injury Type
- Date of Accident and Date Reported
- Location
- Was Supervisor informed and whom
- Executive Manager to review and Approve
- Exact location of incident
- Describe processes being performed
- Describe events leading up to incident
- Describe the events of the incident
- Describe what could have been done to prevent this incident
- Supervisor may comment here
- Upload and files, pictures that would be helpful
- Complete the Injury Details Section:
  - Describe the Injury(s)?
  - Select all Applicable Body Parts Injured?
  - Select All Applicable Injuries?
  - Were safeguards or safety equipment provided?
  - Were the safeguards used?
  - What were the safeguards?
  - Supervisor Interview Comments?
- Complete Investigative Details
  - For Worker Injury, select all issues that apply
  - forklift incident, select all that applies
  - Select all unsafe or hazardous conditions that apply



- Select all unsafe acts that apply
- Select all supervisor activities that apply
- Select all employee attributes that apply
- Names of Witnesses. Note that you may add witness statements after this record is saved. See below.
- Employee Agrees with their comments in this Incident Report
- Supervisor Interview Comments
- Complete the summary and then save the record

### Add Record

\* Indicates required field

Submit Cancel Go Back

#### Initial Details of Accident/Incident

Items in Black to be Completed by Employee  
Items in Blue to be Completed by Supervisor

Incident: Select Employee: Select  
Type: Status:  
Name: Job Title:  
OSHA Injury Type: Select  
If the incident happened to an employee (not a subcontractor or visitor) select here: Select All Employees  
Date and Time of Accident/Incident: Date and Time Accident/Incident was Reported:  
Location: Select Location  
Check the box if Supervisor was Informed: Select Supervisor: All  
Select the Manager that will review this report next: Select Manager...  
Exact Location of the Incident:  
What processes were being performed:  
Describe the Events Leading up to the Incident:  
Describe the Events:  
What could have been done to prevent this incident?

#### Supervisor Interview Comments

Caption: File Name: No files selected.

#### Injury Details

Describe the Injury(s):

Select all Applicable Body Parts Injured:

<input type="checkbox"/> Abdomen	<input type="checkbox"/> Ankle - Left	<input type="checkbox"/> Ankle - Right	<input type="checkbox"/> Artificial Limb/Appliance	<input type="checkbox"/> Body System
<input type="checkbox"/> Brain	<input type="checkbox"/> Buttocks	<input type="checkbox"/> Chest (rib, sternum, etc)	<input type="checkbox"/> Ear(s) (eardrum)	<input type="checkbox"/> Elbow - Left
<input type="checkbox"/> Elbow - Right	<input type="checkbox"/> Eye - Left	<input type="checkbox"/> Eye - Right	<input type="checkbox"/> Facial Bones	<input type="checkbox"/> Facial Soft Tissue
<input type="checkbox"/> Foot - Left	<input type="checkbox"/> Foot - Right	<input type="checkbox"/> Hand - Left	<input type="checkbox"/> Hand - Right	<input type="checkbox"/> Head
<input type="checkbox"/> Hip - Left	<input type="checkbox"/> Hip - Right	<input type="checkbox"/> Internal Organs	<input type="checkbox"/> Knee - Left	<input type="checkbox"/> Knee - Right
<input type="checkbox"/> Lower Back	<input type="checkbox"/> Lower Left Arm	<input type="checkbox"/> Lower Leg - Left	<input type="checkbox"/> Lower Leg - Right	<input type="checkbox"/> Lower Right Arm
<input type="checkbox"/> Lungs	<input type="checkbox"/> Mouth (lips, tongue, throat)	<input type="checkbox"/> Neck	<input type="checkbox"/> Nose	<input type="checkbox"/> Pelvis
<input type="checkbox"/> Shoulder - Left	<input type="checkbox"/> Shoulder - Right	<input type="checkbox"/> Skull	<input type="checkbox"/> Spinal Cord	<input type="checkbox"/> Teeth
<input type="checkbox"/> Thigh, Upper Leg (Left)	<input type="checkbox"/> Thigh, Upper Leg (Right)	<input type="checkbox"/> Toe	<input type="checkbox"/> Upper Back	<input type="checkbox"/> Upper Left Arm
<input type="checkbox"/> Upper Right Arm	<input type="checkbox"/> Vertebrae	<input type="checkbox"/> Wrist - Left	<input type="checkbox"/> Wrist - Right	

Select All Applicable Injuries:

<input type="checkbox"/> Amputation	<input type="checkbox"/> Asphyxiation (choke, suffocate)	<input type="checkbox"/> Bruise Contusion	<input type="checkbox"/> Burn (Chemical)
<input type="checkbox"/> Burn (Heat)	<input type="checkbox"/> Concussion (Head)	<input type="checkbox"/> Crushing	<input type="checkbox"/> Cumulative Injuries
<input type="checkbox"/> Cut, Laceration	<input type="checkbox"/> Dermatitis (any skin irritation)	<input type="checkbox"/> Dislocation (nerve, disc, tear)	<input type="checkbox"/> Electric Shock
<input type="checkbox"/> Fainting, Passing out	<input type="checkbox"/> Foreign body in eye	<input type="checkbox"/> Fracture, Broken bone	<input type="checkbox"/> Freezing
<input type="checkbox"/> Hearing Loss	<input type="checkbox"/> Heat Stress	<input type="checkbox"/> Hernia (from lifting)	<input type="checkbox"/> Infection
<input type="checkbox"/> Inflammation	<input type="checkbox"/> Mental Stress	<input type="checkbox"/> Multiple physical injuries only	<input type="checkbox"/> Muscle Strain
<input type="checkbox"/> No Physical Injury	<input type="checkbox"/> Other occupational diseases	<input type="checkbox"/> Poisoning - Chemical	<input type="checkbox"/> Poisoning - Metal
<input type="checkbox"/> Puncture (needle stick)	<input type="checkbox"/> Radiation (tissue, bone, etc)	<input type="checkbox"/> Respiratory disorders	<input type="checkbox"/> Sprain

Were safeguards or safety equipment provided?: Yes No Were the safeguards used?: Yes No

What were the safeguards?:

#### Supervisor Interview Comments

### Investigative Details

For Worker Injury, select all that applies:

<input type="checkbox"/> Equipment Failed	<input type="checkbox"/> Horseplay/distractive action involved
<input type="checkbox"/> Housekeeping unsatisfactory	<input type="checkbox"/> Improper body positioning used
<input type="checkbox"/> Improper clearance	<input type="checkbox"/> Improper PPE being used
<input type="checkbox"/> Improper procedure being used	<input type="checkbox"/> Improper tools or equipment used
<input type="checkbox"/> Tools or equipment were not in good condition	<input type="checkbox"/> Untrained on proper procedure
<input type="checkbox"/> Worker unqualified to do the job or have inadequate skills	<input type="checkbox"/> Worker was running/jumping/rushing/working at unsafe speed

forklift incident, select all that applies:

<input type="checkbox"/> Driving at an unsafe speed	<input type="checkbox"/> Evasive action was not taken
<input type="checkbox"/> Floor was wet or had any unusual condition	<input type="checkbox"/> Improper procedure used
<input type="checkbox"/> Inadequate lighting	<input type="checkbox"/> Operator distracted
<input type="checkbox"/> Operator Eating or Drinking	<input type="checkbox"/> Operator failed to complete an inspection or report any problems
<input type="checkbox"/> Operator looking at someone	<input type="checkbox"/> Operator talking with someone
<input type="checkbox"/> Operator trained improperly	<input type="checkbox"/> Operator using a phone, radio, RF Unit or Other
<input type="checkbox"/> Operator was looking at paperwork, reaching for something, etc	<input type="checkbox"/> Something fell or loose
<input type="checkbox"/> Something wrong with the equipment	<input type="checkbox"/> Visibility was limited

Select all unsafe or hazardous conditions that apply:

<input type="checkbox"/> Environmental hazard	<input type="checkbox"/> Hazardous materials handling	<input type="checkbox"/> Hazardous method or procedure
<input type="checkbox"/> Improper assignment or personnel	<input type="checkbox"/> Improper lighting	<input type="checkbox"/> Improper placement
<input type="checkbox"/> Inadequate ventilation	<input type="checkbox"/> Inadequately secured	<input type="checkbox"/> Insufficient workspace
<input type="checkbox"/> Lack of mechanical lifting assistance	<input type="checkbox"/> Other	<input type="checkbox"/> Traffic hazards
<input type="checkbox"/> Ungrounded	<input type="checkbox"/> Unguarded/inadequately guarded	<input type="checkbox"/> Uninsulated

Select all unsafe acts that apply:

<input type="checkbox"/> Backing without looking for clearance	<input type="checkbox"/> Cleaning, oiling, adjusting moving equipment
<input type="checkbox"/> Disconnecting, removing, or bypassing safety devices	<input type="checkbox"/> Driving too fast or too slowly
<input type="checkbox"/> Failure to obey traffic control signs or signals	<input type="checkbox"/> Failure to place warning signs & signals
<input type="checkbox"/> Failure to secure or warn	<input type="checkbox"/> Failure to shutoff equipment when not in use
<input type="checkbox"/> Failure to signal when stopping, turning or backing	<input type="checkbox"/> Failure to yield
<input type="checkbox"/> Following too close	<input type="checkbox"/> Gripping object insecurely or taking wrong hold on object
<input type="checkbox"/> Horseplay, fighting, etc	<input type="checkbox"/> Inattention to footing or surroundings
<input type="checkbox"/> Jumping from elevations, vehicles, etc	<input type="checkbox"/> Not using safety equipment, or using it improperly
<input type="checkbox"/> Other	<input type="checkbox"/> Overloading
<input type="checkbox"/> Releasing or moving loads, etc, without giving adequate warning	<input type="checkbox"/> Repairing equipment without authorization
<input type="checkbox"/> Replacing safety devices with those of improper capacity	<input type="checkbox"/> Riding in unsafe position
<input type="checkbox"/> Running	<input type="checkbox"/> Throwing material or tools
<input type="checkbox"/> Unnecessary exposure to moving materials or equipment	<input type="checkbox"/> Unnecessary exposure under suspended loads
<input type="checkbox"/> Use of equipment of material for other than intended purpose	<input type="checkbox"/> Using hand instead of tools

Select all supervisor activities that apply:

<input type="checkbox"/> Faulty instruction to employee	<input type="checkbox"/> Improper planning of job
<input type="checkbox"/> Inadequate knowledge/leadership	<input type="checkbox"/> Inadequate training of employee

#### Names of Witnesses:

Employee Agrees with their comments in this Incident Report: Yes No

#### Supervisor Interview Comments

#### Summary

Length of time employee has been performing job function when incident occurred: Year(s) Month(s)

Length of time employee has been with the company: Year(s) Month(s)

Time employee began work on date of incident:

Declines to go to the doctor: Yes No

Number of days away from work:

Number of days on job transfer or restriction:

Death: Yes No

Archive: Save Cancel

## Reporting by Witnesses - Step 2

Once the initial report is saved, CIS will immediately send an e-mail to the executive manager responsible to review and approve the record. Immediately after saving the record, you may select that report then add one or more witness statements by selecting the record (Take note of the record ID #) then click View Witness Statement.

Accident/Incident

Accident/Incident	Accident/Incident Details	Accident/Incident Summary
<input checked="" type="checkbox"/> ID: 1 <b>TAKE NOTE OF THE I.D. NUMBER!</b> Incident Type: Illness OSHA Injury Criteria: All Other Illnesses Date and Time of Accident/Incident: Jul. 16, 2019 07:22:00 PM	Location: Russell-1 Specific Location: In office Description of Accident/Incident: Injury Description: Fainted	Supervisor Responsible: Peter Sanderson Manager Responsible: Peter Sanderson OSHA Report Needed?: 0 Corrective Action Needed?: No

This will open the witness table database and link all witness statements added to the original incident report. First select the applicable I.D.# of the incident then select NEW. There are no limits to the quantity of statements you add.

<< Back to Incident Report

Employee Incident Report: 1 - Samantha Welch (Admin)

+ New

Sort By | Total Records: 0

There are no records found

You may enter the witness statements including:

- Name of person involved in accident/incident
- Date and Time of Accident/Incident
- Name of Witness
- Phone Number
- Witness employed by
- Job title
- Location where incident occurred
- Specific area
- Describe incident
- Injury details as noted by witness
- Names of others who knew about the incident
- Additional Comments
- Recommendations on how to prevent the incident from happening again
- Supervisor/Manager

## Witness Statement

**Add Record**  
 \* Indicates required field

### Witness Statement

To be Completed by Witness

\* Name of person involved in accident/incident:

\* Name of Witness:

\* Witness Employed by:

Date and Time of Accident/Incident:

\* Phone Number:

\* Job Title of Witness:

Location where incident occurred:

Specific area:

Describe in detail about the incident:

### Injury Details

Describe the Injury(s):

<input type="checkbox"/> Amputation	<input type="checkbox"/> Asphyxiation (choke, suffocate)	<input type="checkbox"/> Bruise Contusion	<input type="checkbox"/> Burn (Chemical)	<input type="checkbox"/> Burn (Heat)
<input type="checkbox"/> Concussion (Head)	<input type="checkbox"/> Crushing	<input type="checkbox"/> Cumulative Injuries	<input type="checkbox"/> Cut, Laceration	<input type="checkbox"/> Dermatitis (any skin irritation)
<input type="checkbox"/> Dislocation (nerve, disc, tear)	<input type="checkbox"/> Electric Shock	<input type="checkbox"/> Fainting, Passing out	<input type="checkbox"/> Foreign body in eye	<input type="checkbox"/> Fracture, Broken bone
<input type="checkbox"/> Freezing	<input type="checkbox"/> Hearing Loss	<input type="checkbox"/> Heat Stress	<input type="checkbox"/> Hernia (from lifting)	<input type="checkbox"/> Infection
<input type="checkbox"/> Inflammation	<input type="checkbox"/> Mental Stress	<input type="checkbox"/> Multiple physical injuries only	<input type="checkbox"/> Muscle Strain	<input type="checkbox"/> No Physical Injury
<input type="checkbox"/> Other occupational diseases	<input type="checkbox"/> Poisoning - Chemical	<input type="checkbox"/> Poisoning - Metal	<input type="checkbox"/> Puncture (needle stick)	<input type="checkbox"/> Radiation (tissue, bone, etc)

Was there any other incidents that have occurred to this person:

Names of others who know about this incident:

Additional Comments:

Recommendations on how to prevent this incident from recurring:

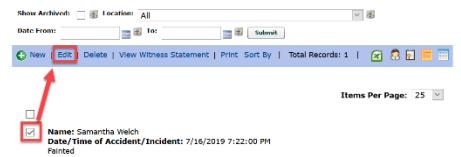
**Incident Report:**  
 1 - Samantha Welch (Admin) ▼

[Save](#)   [Cancel](#)

### Reporting Review and Approval - Step 3

Once the Executive Manager responsible to approve the incident receives e-mail notification, he/she must edit the record and complete the areas in blue and green and check if the incident should be reported to OSHA and also check if CIS should issue a Corrective Action. If a corrective action is selected then when the record is saved, CIS will link the accident report to a new corrective action and the corrective action input form will be displayed, ready to be completed. (see Corrective Action). If OSHA report is selected, then this incident will become part of the spreadsheet for OSHA.

If the Executive Manager decides the issue is complete, they may click the archive button.



## OSHA Reporting

For the OSHA report to work and be accurate, a manager in your HR must complete each month the total man-hours for each location. Under Accident/Incident select New record to enter the man-hours for each location. You will need to add a new record for each location every month. Additionally, in the Location Criteria setting in administration, the complete company information must be current such as the NAICS Code, Industry Description, Size, Establishment Type and Annual Average Employees.

The screenshot shows the 'Add Record' form with the following fields:

- \* Month: January
- \* Year: 2006
- Location: Select Location
- \* Hours: [Empty text box]

Buttons: Cancel, Go Back, Save, Cancel.

The 'Accident/Incident' menu is open, showing options: Accident/Incident Reporting, Accident/Incident Reporting - Managers, Monthly Manhours (highlighted), and OSHA Report.

To create the OSHA Report, select OSHA Report under Accident/Incident. Select the reporting period and location. The report will be displayed, and you may download the .csv file that you may review, and then upload directly to OSHA.

The screenshot shows the OSHA Report interface with the following elements:

- From: 01/01/2018
- To: 02/05/2020
- Locations: All, Location 1, Location 2, Location 3
- Report Continues to the right... (with a red arrow pointing right)
- Download Report (.CSV) File

Company Name	Location	Street Address	City	State	Zip	Naics Code	Industry Description	Size	Establishment Type	Year Filing For	Annual Average Employees	Hours	Incident Type	Death	Number of days away from work	Number of days on job transfer/restriction	Number of days away from work
Location 1	Location 1	1234 Parkway Drive	City	TN	Zip	NAICS Code	Industry	Size	Type		200	5000.00	1	0	1	0	5

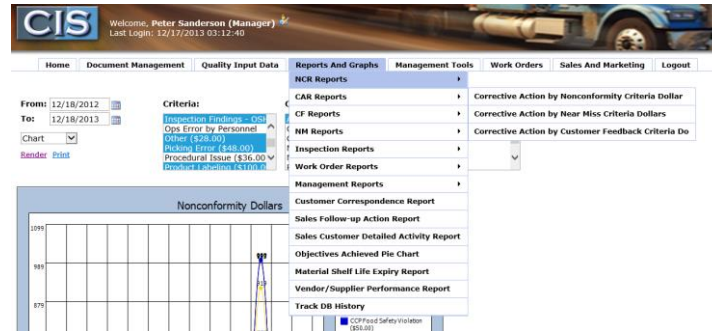
## Reports and Graphs

### Statistical Reports and Graphs – New Features

1. Manager's Action Report – This report will list by manager all outstanding actions required that are late and all meetings that were scheduled during the reporting period. This report is an excellent report to print and review at a Management Review Meeting.
2. Financial Report – This report is divided into three sections. This report may be downloaded and imported into an accounting software to record more accurate information on costs and expenses:
  - a. Costs of Non-Conformity (failure) and includes the costs associated with Non-Conformity, near miss, Customer Feedback, Corrective Actions and inspection
  - b. Costs associated with maintaining a quality system such as training, meetings, objectives, vendor management and calibration
  - c. Quantity of procedures and forms that were revised during that period

## Viewing Reports and Graphs

This section is to view all summary results collected and reported by the CIS Software. This section is simple to navigate. Click Reports and Graphs and then select the applicable report that you want generated.



In many reports you may have options to select such as the criteria to be reported, the date from-to and if you want a graph or a spreadsheet csv file report to better pinpoint the data you require.

**Note:** To select multiple criteria, hold down the Ctrl key and click the selections with your mouse.

From: 12/18/2012 To: 12/18/2013 Chart: [v] Render Print

Criteria: Inspection Findings - OSI, Ops Error by Personnel, Other (\$28.00), Picking Error (\$48.00), Procedural Issue (\$36.00), Product Labeling (\$100.00)

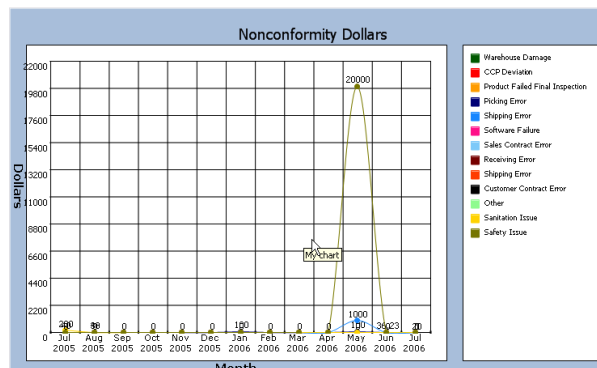
Customer: All, CIS Customer 2, CIS Customer 3, Mehul, Neel, Peter Sanderson

Issue Type: All, Commercial, Environmental, Performance, Quality, Quantity

### Example of a Report

Nonconformity Dollars												
	Warehouse Damage	CCP Deviation	Product Failed Final Inspection	Picking Error	Shipping Error	Software Failure	Sales Contract Error	Receiving Error	Shipping Error	Customer Contract Error	Other	Sanitation Issue
Jul 2005	40	0	0	0	0	0	0	0	0	0	0	200
Aug 2005	0	0	0	48	30	0	0	0	0	0	0	0
Sep 2005	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2005	0	0	0	0	0	0	0	0	0	0	0	0
Nov 2005	0	0	0	0	0	0	0	0	0	0	0	0
Dec 2005	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2006	0	0	0	100	0	0	0	0	0	0	0	0
Feb 2006	0	0	0	0	0	0	0	0	0	0	0	0
Mar 2006	0	0	0	0	0	0	0	0	0	0	0	0
Apr 2006	0	0	0	0	0	0	0	0	0	0	0	0

### Example of a Graph



In addition to the reports and graphs section, some Apps such as Non-Conformity and Customer Feedback have additional detailed reports located at the top in their App. For example, you may print out a detailed Non-Conformity report for management listing the dates, customer and a description of the Non-Conformity for a meeting or you may view these immediately during a conversation with the customer to be better prepared.

NCR ID	Date	Customer Name	Non Conformity Report Description	Non Conformity Report Resolution
88	12/17/2013	Mehul	Non Conformity Report Description	Non Conformity Report Resolution
89	12/17/2013	Mehul	Non Conformity Report Description	Non Conformity Report Resolution
90	12/17/2013	Mehul	Non Conformity Report Description	Non Conformity Report Resolution
87	12/16/2013	Peter Sanderson	Testing	testing
85	11/20/2013	CIS Customer 2	test	test
81	10/16/2013	Mehul	Non-Conformance Report/Non-Conformance Accounting Reports	Non Conformity Report Resolution
82	10/16/2013	Neel	Non-Conformance Report/Non-Conformance Accounting Reports	Non Conformity Report Resolution
77	10/11/2013	Mehul	The uniPoint Non-Conformance module offers the ability to manage the life-cycle	The status of non-conformance resolution as well as the effect of rework
78	10/11/2013	Mehul	The uniPoint Non-Conformance module offers the ability to manage the life-cycle	The status of non-conformance resolution as well as the effect of rework

## Management Tools

### Auditing

The Auditing system is designed to manage all your process internal audits and maintain a complete summary of events as they occur. The auditing system has its own action item system that better serves the process than integrating it with the Nonconformity and Corrective Action System.

### Planning the Audits

Click on Management Tools/Auditing/Audit Details to display the audit details screen then select New.

Process Department: All

Search In: All

Show Archived: ☒ Submit

**New** Sort By | Total Records: 1

Items Per Page: 25

☐ ID: 1  
 Process/Department: Warehouse Loading/Unloading  
 Scheduled Start Date/Time: 7/16/2019 7:27:00 PM  
 Auditor: 4  
 Actual Audit Date: .....

Complete the plan for the audit including:

- Process/Department
- Audit Standard such as ISO 9001:2015 or AS9100
- Enter any applicable procedures
- Planned Start and end time (enter date then slide the bar for time)
- Select the auditors (note you can have an auditor user type then only auditors would be selectable here)
- Select the attendees

Enter Scheduled Date Start Time

02/21/2020 1:00 pm

Feb 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29

Time 12:00 pm

Hour Minute

Now Done

- Select any other employees (these would be employees in your HR that are not in the CIS user's table)
- Enter any audit comments or special instructions
- Upload any document to be used
- Select the Lead Auditor (owner)
- Save the record and CIS sends out audit notification e-mails and puts the audit on the calendar

New CIS: Audit has been created

 admin@newcis.com  
To: peter.sanderson@outlook.com  
 This message was sent with High importance.

Hi Peter Sanderson,

Following Audit has been created.

Subject: **ISO 9001:2015**

Procedures: **WI-003**

Start Time: **Feb. 21, 2020 12:00:00 PM**

End Time: **Feb. 21, 2020 03:00:00 PM**

Notes: **[[ATTACHMENT]]**

Thanks

TQMS

## Performing the Audit

Select the audit under audit details and then select edit.

Process Department:

Search In:

[+ New](#) [Edit](#) [Delete](#) | [View Audit Actions](#) [Sort By](#) | [Total Records: 1](#) |

Items Per Page:

☒ **ID: 2**  
**Process/Department:** Warehouse Loading/Unloading  
**Scheduled Start Date/Time:** 2/21/2020 12:00:00 PM  
**Auditor:** 2  
**Actual Audit Date:**  
 .....

The complete audit will now be displayed with the plan on top and the actual audit below. The audit can be completed using a windows tablet. The audit questions can be revised, modified and/or new ones added by your administrator or CIS Consultant.

## Sample of Audit Questions

### **Conducting the Process**

What are the inputs into this process?

*(what do you need in order to do your job?)*

[Click Here for Suggested Questions](#)

How is the process performed?

*(Ask questions like why do you do it that way? What if this happens?)*

What are the outputs of the process?

Are the records of process completion complete, legible?

Once completing the audit, the auditor may summarize the audit and decide to issue audit actions. If yes, then Yes to actions required should be selected.

The screenshot shows the 'Audit Summary' form. At the top is a large text area for the 'Audit Summary'. Below it is a section titled 'Are Actions Required?' with a yellow checkmark icon. It contains two radio buttons: 'Yes' and 'No'. The 'Yes' radio button is selected. Below this are two dropdown menus: 'Auditor/Owner' (set to 'Peter Sanderson') and 'Actual Audit Date'. At the bottom are 'Save' and 'Cancel' buttons.

## Issue Audit Actions

In audit details, select the audit that you wish to issue actions and click on “View Audit Actions” to open the actions screen.

The screenshot shows the 'Audit Details' screen. At the top is a 'Process Department' dropdown menu set to 'All'. Below it is a 'Search In' dropdown menu set to 'All' and a 'Show Archived' checkbox. A toolbar contains buttons for 'New', 'Edit', 'Delete', 'View Audit Actions' (highlighted with a red box), 'Sort By', and 'Total Records: 1'. Below the toolbar is a table with one row. The first cell of the row contains a checkbox with a checkmark (highlighted with a red box). The rest of the row contains the following text: 'ID: 2', 'Process/Department: Warehouse Loading/Unloading', 'Scheduled Start Date/Time: 2/21/2020 12:00:00 PM', 'Auditor: 2', and 'Actual Audit Date:'. Below the table is a message: 'Items Per Page: 25'.

The audit actions table will be displayed, and you may then issue as many different actions for that one audit as you wish. Click New to add an action.

The screenshot shows the 'Audit Actions' screen. At the top are two dropdown menus: 'Type Action' (set to 'All') and 'Auditor' (set to 'All'). Below them is a 'Search In' dropdown menu set to 'All' and a 'Show Archived' checkbox. A toolbar contains buttons for 'New' (highlighted with a red box), 'Sort By', and 'Total Records: 0'. Below the toolbar is a message: 'There are no records found'.



The auditor shall complete the first part of the action form and select the manager(s) responsible to complete the action.

**Add Record**  
\* Indicates required field

\* **Audit:**  
Select Audit: [v]  
\* **Date Action Entered:** 02/06/2020  
\* **Type of Action Required:** [v]  
Assigned To (Action Owner):  
☐ Adams, Michael ☐ Ali, Wali ☐ Allen, Daniel ☐ Andrews, James  
☐ Andrews, Kent ☐ Balib, Luke ☐ Bacco, Craig ☐ Badders, Brian  
☐ Baldwin, Jason ☐ Bertrand, Meredith ☐ Blake, William ☐ Bollig, Kyle  
☐ Brech, Edward ☐ Call, Troy ☐ Caprio, James ☐ Caroselli, Karl  
Describe Actions:  
  
Why? Answer Is this root cause? NO  
Enter Root Cause:  
Upload Fish Bone If available:  
Browse... No file selected.  
Describe Immediate Containment:  
Describe Final Actions:

Once saved, CIS will assign the action to the manager(s) and send out an audit action e-mail as well as place it on the master calendar.

The manager(s) must work their way through the process up to the final actions and checking the Actions Implemented button. Once this button is clicked, CIS will send an e-mail notification to the Lead Auditor (Owner) to advise him/her that the action is ready to be verified and closed.

### **Manager's Portion that Completes the Action**

Why? Answer Is this root cause? NO  
Enter Root Cause:  
Upload Fish Bone If available:  
Browse... No file selected.  
Describe Immediate Containment:  
Describe Final Actions:  
Actions Implemented:  
☐  
Date Implemented:  
Cost of All Actions:  
0.00  
Actions Performed By:  
☐ Curtin, Rachel ☐ Dagley, Rosandra ☐ Daniel, Eric ☐ Daniel, Lorrie  
☐ Davis, Lesley ☐ Demler, Cameron ☐ Derek Tahamont ☐ Dinges, Rodney  
☐ Dinges, Roger ☐ Donnellon, Robert ☐ Ducoing, Daria ☐ Dyer, Michael  
☐ Ebrhard, Andrew ☐ Edwards, Audrey ☐ Edwards, James ☐ Finwiller, Peter

## Auditor's Portion to Complete the Verification and Close the Action

Auditor/Owner:  
Adams, Michael

Date Verified:

Auditor's/Owner's Comments:

Action Closed:  
☐

Planned Follow-up Date:

Actual Follow-up Date:

Follow-Up Results:

Follow-up Upload Files:  

Browse... No file selected.

Auditor who Performed Follow-up:  
Adams, Michael

Save

Cancel

## Audit Report and Current Status of Events

Under Auditing click on Audit Report and a complete report will be displayed on all open actions resulting from audits. This table is automatically updated as status changes.

### Audit Report

Show Archived: ☐

IA ID #	Audit it came from	Audit Process	Due Date Internal Audit	Action Description	Action Owner Action	Category	Action Taken Date	Completed	Verified By	Results of Verification	Verified Date action taken / closed	Open / Closed	Planned date for follow up	Actual follow up Date	Verified / Effective (Results)
1		Receiving										Yes			
1	2	Receiving	03/02/2018	Scale in warehouse is past due calibration	samantha	Corrective Action	Require a revised Training procedure to review key personnel who need to ensure that another person is trained in their duties so when they leave for vacation this will not re-occur.	03/02/2018	peter#43	Six positions were identified to be cross-trained: Quality Manager, Operations Manager, Sales Manager, Maintenance Manager, Sanitation Manager and Customer Service Manager. Training provisions were scheduled and completed.	3/2/2018 12:00:00 AM	No	08/01/2018		ALL ACTIONS COMPLETE AND ARE STILL EFFECTIVE
2	2	Receiving	03/02/2018	Temporary Employees Must be included in the training system and be trained in safety and their job requirements prior to being placed in the warehouse.	samantha	Opportunity for Improvement	Revised training procedure and in accordance to executive management ALL training must be done before workers are permitted to work in the warehouse.	03/02/2018	peter#43	Verified all temporary workers and training was completed. Operations manager fully understand the new directive from executive management.		No	08/01/2018		
3	2	Receiving	03/16/2018	Found shrink wrap scraps on the racks and many vacant floor rack positions were dirty. Proper cleaning should be done.	samantha	Opportunity for Improvement	Added a daily warehouse walk-through inspection process to visually inspect the cleanliness of the warehouse and take immediate action when required.		mukesh			Yes			
4	2	Receiving	02/13/2020	Procedure Paragraph 5.2 - 5.4 (Marking Lot Numbers) was not being performed during the audit of the process.	bliss67	Corrective Action			bliss67			Yes			

CIS | CIS 2020- Continuous Improvement Software - 2020- Version 1 | © TQMS Inc. | Cloud Computing at its BEST | Developed using Pruthi Technologies - A Web Development Application Company |

## Meetings/Planning

The Meetings/Planning panel provides a system to manage meetings and planning projects including follow-up of action items and the creation of agendas. Furthermore, the Meetings/Planning App includes its own calendar and can create multiple planned Meetings (yearly, quarterly or monthly) and/or to clone meetings. Although this App was designed for meetings, agendas and action items it has proved to be a powerful tool for planning and scheduling projects by planning the project actions as agenda items with assigned responsibilities and due dates. Hence, we name it Meeting/Planning.

Click on Management then click on the Meetings/Planning Section.

## Entering a New Meeting

Click Management Tools/Meetings/Planning/Meetings/Planning Details then +New. Enter the following information:

- Meeting Title
  - It is **very important** that you maintain some **consistency with the meeting titles**. After using CIS for a while, you will have many different types of meetings and projects. CIS provides a search engine so that you may recall groups of similar meetings (simplify retrieval of information). For example, you may want to consider starting the title with a code:
    - For management reviews – MR

- For safety meetings in warehouse - SWH
  - For safety meetings in welding department - SWD
  - For Environmental Impacts - EI
  - For Internal Projects - IP
  - And so on...
- The consistent titles will certainly simplify finding your meetings and projects quickly
- For more information, see retrieving Meetings
- Date Meeting Plan Prepared
- Meeting Date and Select if the meeting is once, weekly or monthly. CIS will set-up multiple meetings
  - When setting up multiple Meetings/Planning, CIS will immediately create the multiple Meetings/Planning. Caution should be used when creating these Meetings/Planning so that you do not create an excessive amount of Meetings/Planning. For example, creating weekly Meetings/Planning for ten years will result in  $52 \times 10 = 520$  new meetings instantly!
  - CIS will give you a warning notice twice to ensure that you have selected the correct number of multiple meetings before it actually creates them
  - If you start a weekly meeting on a Tuesday, the last date selected must also be a Tuesday
  - It is also important to note that when you create multiple Meetings/Planning, they are saved as a group. You may add agenda items to one, selected or all Meetings/Planning at one time (see adding agenda plan items. This is very useful for planning yearly meetings
- Meeting Location
- Meeting Scheduled Start and Finish Time
- Meeting Manager (Manager Calling the Meeting)
- Select the Managers to attend the Meeting. You may select one or more managers in addition to the manager responsible to be notified of this meeting by holding down the Ctrl button and clicking on each manager's name. Note, You MUST select the meeting manager again, since this field is used to send out the e-mail notifications and add the Meeting to the manager's home page calendar
- Enter any additional comments for the managers to better prepare for the Meeting
- You may enter an approximate cost for the Meeting. We recommend that you establish a rate per manager and a rate per employee including the overhead costs in order to simplify the cost calculations. For example, if the rate per manager is \$ 60.00/Hour, then the cost of a one-hour Meeting with ten managers will be \$ 600.00
- Upload any files (add new file), notes, drawings or other information that may be useful to review prior to the Meeting
- Click Save

Meeting/Audit Date: 12/18/2013

☐ Onetime
 ☐ Weekly
 ☒ Monthly
 ☐ Quarterly
 ☐ Yearly

**Monthly Recurring**

☒ Day  of every  month(s)

☐ The First  Sun  of every  month(s)

End Date: 12/18/2013

### Meeting Input Form to Enter a New Meeting - Sample Top Part Only

Add Meeting/Audit Cancel Go Back

\* Indicates required field

Meeting/Audit ID: New Meeting/Audit

\* Meeting Title:

\* Date Meeting Plan was Prepared: 02/06/2020

\* Meeting Date: 02/06/2020

☐ Onetime
 ☐ Weekly
 ☒ Monthly
 ☐ Quarterly
 ☐ Yearly

**Monthly Recurring**

☒ Day  of every  month(s)

☐ The First  Sun  of every  month(s)

End Date: 02/06/2020

\* Meeting Location:

\* Meeting Start time:

\* Meeting End time:

\* Meeting Manager:

Select Manager...

**Attendees Users:**

<input type="checkbox"/> Andrew Symond	<input type="checkbox"/> Bill Horricks	<input type="checkbox"/> Imran Khan	<input type="checkbox"/> Kamal Khan
<input type="checkbox"/> Mukesh Tester	<input type="checkbox"/> Nirav Joshi	<input type="checkbox"/> Peter	<input type="checkbox"/> Peter Sanderson - VP Sales
<input type="checkbox"/> Russell Eng	<input type="checkbox"/> Samantha Welch - CIS Tester	<input type="checkbox"/> Sue Sue	<input type="checkbox"/> TQMS Tester
<input type="checkbox"/> Utkarsh Shah - Manager			

## Entering Agenda/ Plan Items for the Meeting

Select the Meeting that you want to work on then from the top select View Agenda/Plan which will open the agenda/plan

Manager: All

Show Archived: ☐ Filter By: Show All Meetings

Search In: All

[New](#) | [Edit](#) | [Delete](#) | [Archive](#) | [View Uploaded files](#) | [Send Email Notification](#) | [View Agenda/Audit Plan Items](#)

---

☒ **Meeting/Audit Information**  
ID: 1  
Meeting Title: AA - Management Review Master  
Meeting Date: 02/01/2018  
Meeting Location: Conference Room  
**Managers Attending**  
Attendees Employees:  
Attendees Users:  
**Meeting/Audit Specifics**  
Meeting Start time: 09:00  
Meeting End time: 10:00  
Meeting Manager: Samantha Welch - CIS Tester  
Cost: 0.00

Meeting ID#: 1 [Back to Meetings/Audits](#)

[New](#) | Sort By: Priority  | Total Records: 11 |

Items Per Page: 25

---

☐ **Agenda/Plan Info**  
ID: 1  
Agenda/Audit Plan Title: The Status of actions from previous management reviews  
First Reminder: 10  
Second Reminder: 3  
Due Date: 03/14/2018  
**Agenda/PlanDescription**  
Applicable Documents:  
Cost: 0.00  
**Completed Info**  
Responsible Users: Peter Sanderson - VP Sales  
Completed Flag: Open  
Completed Date:  
**Verified Info**  
Verified By:  
Verified Date:

## Agenda/Plan Input Form

\* Indicates required field

Action Item ID:  
**New Agenda/ Plan**  
[Cancel Go Back](#)

Meeting/ID:

1 - AA - Management Review Master - 02/01/2018

Hold down control key to select multiple items

\* Agenda/Plan Title:

Applicable Documents:

Agenda Plan Details:

Action Items Description:

Start Time:

End Time:

Due Date:

First Reminder:  Days before the Due Date (0 = no email)

Second Reminder:  Days before the Due Date (0 = no email)

Responsible Users:

Each meeting has its own agenda/plan record. Each agenda/plan can have unlimited records within. You may continue to add agenda/plan records for the specific meeting. You may also start and continue to add records in the agenda/plan at a later date.

The agenda/plan is divided into three main sections, **The Plan** and **the Action Item Results** and the **Completion** of the meeting Agenda/Plan item. Therefore, when we create the agenda/ plan records, we first complete the plan. The balance will be completed later during and/or after the meeting.

For the Plan, enter the:

- Agenda/Plan Title
- Applicable Documents
- Agenda/Plan Details
- Scroll down and click Insert if you wish to continue to enter new Agenda/Plan items or Insert and Go to Meeting if you have finished entering the Agenda/Plan items. When you click Insert, you will be presented with another Agenda/Plan Input Screen to continue as above. Continue to enter the agenda topics one by one and save each time by repeating the above steps

**Note:** The other input fields in the agenda add/edit meeting are to be used during or after the meeting is held to enter the agreed action items and follow-up dates.

### **Entering Agenda/Plan Items for Multiple Meetings/Planning**

When you have created multiple meetings (weekly, monthly, quarterly or yearly) you can enter agenda/plan items to one, some or all the planned Meetings. For example, in a meeting, you may want to start each meeting with a review of previous meeting items.

When entering the agenda/plan items, you will be presented with an additional selection for a group of multiple meetings that will allow you to select one or more meeting to have the agenda/plan added. Below shows two selected from the many meetings created. That means that the agenda/plan item will be added to the two meetings selected only and not the others.



Once selecting the applicable meetings, you continue as shown above for a single meeting.

Suggestions: This feature will simplify data entry and allows for a plan of agendas for future meetings. As an example, if you plan monthly safety meetings, you could add lift truck safety to meeting one, then first aid to meeting two and so on. They each could start with a common agenda but have different topics each month for the second and third agenda topics and end with another common agenda topic.

Once you have entered all the agenda items for the meeting, you may review the items on the left as seen below:

+ New
Sort By: Priority ▲ | Total Records:

Items P

☐

☐

**Agenda/Audit Info**  
 ID: 149  
 Agenda/Audit Plan Title: Review Employee's knowledge of NCRs  
 First Reminder: 0  
 Second Reminder: 0  
 Due Date:  
**Agenda/Audit Description**  
 Applicable Documents: QSP-003  
 Cost: 0.00  
**Completed Info**  
 Responsible Users:  
 Completed Flag: Open  
 Completed Date:  
**Verified Info**  
 Verified By:  
 Verified Date:

☐

**Agenda/Audit Info**  
 ID: 198  
 Agenda/Audit Plan Title: Review Open NCRs  
 First Reminder: 0  
 Second Reminder: 0  
 Due Date:  
**Agenda/Audit Description**  
 Applicable Documents: QSP-003  
 Cost: 0.00  
**Completed Info**  
 Responsible Users:  
 Completed Flag: Open  
 Completed Date:  
**Verified Info**  
 Verified By:  
 Verified Date:

### Adding Results, Action Items, Responsibility, and Follow-Up

During or immediately after the Meeting, you must edit the agenda items to enter the action items agreed upon (if applicable), the due date for completion, days for the first and second e-mail reminder (days before due date) and the responsible manager(s). You may select multiple managers by holding the Ctrl key when selecting. Once this is complete, CIS will follow-up and ensures that all items are completed. The action items will appear on the Master calendar, on each manager's home page under action items and will be included in the late manager's action report if they are not completed before the due date.

When the action items are completed, the responsible manager should edit the action item and complete the following:

- Do not click the completed flag at this step unless it is verified at the same time
- Enter the Completed Comments
- Completed Date and click Save

Finally, the action item must be verified and closed by the manager performing the action.

To close the item, edit the agenda/plan and click Completed Flag, enter the Verified By, Verification Notes and date. Click Save.

**Note:** CIS will send e-mails to managers for all late action items and they will also show on the master calendar as late.

## Retrieval of Information (Meetings/Planning)

As mentioned earlier, maintaining consistency with Meeting titles will help in the retrieval process. The following settings are available to provide a list of Meetings/Planning that you may want to review or work with:

The screenshot shows a web interface for managing meetings. At the top, there are several filters: 'Manager' set to 'All', 'Show Archived' with an unchecked checkbox, 'Filter By' set to 'Show Recent Meetings', and 'Search In' set to 'All'. A 'Submit' button is to the right of the search field. Below these filters is a blue header bar with a '+ New' button, 'Sort By: Meeting/Audit Date' with an upward arrow, and 'Total Records: 3'. To the right of the header are icons for a calendar, a person, a question mark, a document, and a list. Below the header, there is a table with one row containing a checkbox, a text field, and a date field. The text field contains the word 'New'.

Items Per Page: 25



Please note that you may search by keywords, show archive, filters and by managers. However, these searches are inter-related with each other. For example, if you have no check mark in show archive and a filter set as “Hide meetings in the past” and use a keyword search, then the results will not display the keyword results from past meetings or meetings that are archived.

- Keyword Search:
  - Search In – To search a word or phrase in one of the following fields:
    - Title
    - Location
    - Meeting Manager
    - Comments
  - Enter the key Word then Click “GO” (remember to check the archive, filter and manager setting)
- Archive – When checked, CIS will display archived and not archived records
- Filter by:
  - You may further filter the results by selecting one of the following filters:
    - Show Recent Meetings
    - Show meetings in the next month
    - Show meetings in the next quarter
    - Show meetings in the last quarter
    - Show only archived meetings
    - Show all meetings (will not show archived unless archived is checked)
    - Custom date filters (You can select custom dates from-to)
- By manager - You can select a manager and it will display all meetings from the manager.

## Meeting Calendar

In the Meeting section there is a calendar. This calendar is slightly different that the master calendar because:

1. It displays only Meetings
2. It displays the TITLE of the Meeting (very helpful)

## Cloning a Meeting

You may clone a Meeting or group of Meetings/Planning by selecting the Clone Meeting.

The screenshot shows the CIS web application interface. At the top is a navigation bar with tabs: Home, Document Management, Quality Input Data, Accident/Incident, Reports And Graphs, Management Tools (selected), Risk and Performance, Administration, HELP, and Logout. Below the navigation bar, the 'Clone Meeting/Audit' form is visible on the left. It includes a dropdown menu for 'Meeting/Audit' set to 'CIS Implementing - 01/08/2020' and a text field for 'Meeting Date' set to '02/06/2020'. A 'Clone' link is located below the date field. On the right, the 'Management Tools' sidebar is expanded, showing a list of tools: Auditing, Meetings/Planning (selected), Objectives, Calibration/Maintenance, Vendor Management, Human Resource Management, Special Requirements, Customer Supplied Property, and Sales And Marketing. The 'Meetings/Planning' tool is further expanded, showing sub-items: Meetings/Planning Details, Print Meetings/Planning Records, Print Agenda/Plan Items Records, Calendar, and Clone Meeting/Plan (selected).

When you clone a meeting, CIS clones the Meeting and all the agenda/plan items. Therefore, if you intend to clone a meeting it is best to clone it before you complete the action items for the master Meeting you want to clone, or they will appear in the cloned Meetings/Planning. In other words, if you clone a completed Meeting, you will need to edit the cloned Meeting and remove the specifics that were entered from the previous meeting that you cloned. To clone select the Meeting and then the desired Meeting date.

## **Objectives**

### Objectives Overview

Objectives are intended to be the management tool of choice to drive continuous improvement and to manage long term projects. For example, if an organization is experiencing repetitive problems such as picking errors daily, it makes no sense to continuously issue Corrective Actions. It is important that these errors continue to be recorded as Non-Conformity either daily or weekly so that CIS may track the picking error's improvements. However, since a Corrective Action issued to one manager for these repetitive Non-Conformity may not be effective, we can decide to make the picking errors a project for continuous improvement. In this instance, it is advisable to send an e-mail to all employees who enter picking errors to advise them not to require a Corrective Action in the future since the issue is now to be handled by management as a "Quality Objective for Improvement".

The objectives App can also be used to manage long term projects because of its excellent objectives/history log that is quick and easy to use but records a complete history of actions throughout the project. This eliminates the need for meetings to follow-up on agreed actions. One can simply refer to the objective's log to review the project status.

### Entering an Objective

To enter an objective, click on Management Tools/Objectives/Objective Details then click +New. Enter the following information:

- Select the Issue Type (quality, environmental, safety etc.)
- Enter the Date
- Process Description (such as Picking Process)
- Enter the measurable criteria, the criteria used to measure the performance of the process such as:
  - Quantity of Errors per Month
  - Dollars of Errors per Month
  - Percentage Rejection per Month
  - Average Monthly Temperature...
- Enter the current measurement as obtained by reviewing the charts within CIS or by establishing the data from a management review meeting or other data analysis



- Enter the desired improvement. Remember, be realistic so that the objectives may be obtained. For example, if you have 10 picking errors per day, a desired objective of 0 picking errors per day may not be realistic. Reducing from 10 to 3 may be more realistic. Once this objective is achieved, you may create a new one to go from 3 to 1 per day
- Enter the due date for this objective to be achieved. Provide your management with enough time to work and achieve the objective. It may be 3 months or 1 year
- Select a manager or group of managers to work on the objective
- You may provide further explanations in the explain box
- You may also upload applicable documents, reports, and audit results in the upload section
- Click Save

The Manager(s) will be advised by e-mail of the objectives to be achieved.

### Objectives Input Form

Add Quality Improvement Objective

\* Indicates required field

**Objective ID:** New Objective  
[Cancel](#) [Go Back](#)

**Issue Type:** Performance

**\* Objective Date:** 02/06/2020

**Customer/Supplier:**

**\* Process:**

**\* Measurable Criteria:**

**\* Current Measurement:**

**Desired Measurement:**

**Desired Date:** 02/06/2020

**Managers Responsible:**

<input type="checkbox"/> Adams, Michael	<input type="checkbox"/> Ali, Wail	<input type="checkbox"/> Allen, Daniel	<input type="checkbox"/> Andrews, James
<input type="checkbox"/> Andrews, Kent	<input type="checkbox"/> Babb, Luke	<input type="checkbox"/> Bacco, Craig	<input type="checkbox"/> Badders, Brian
<input type="checkbox"/> Baldwin, Jason	<input type="checkbox"/> Bertrand, Meredith	<input type="checkbox"/> Blake, William	<input type="checkbox"/> Bollig, Kyle
<input type="checkbox"/> Brech, Edward	<input type="checkbox"/> Call, Troy	<input type="checkbox"/> Caprio, James	<input type="checkbox"/> Caroselli, Karl

**Objective Achieved:**

☐ Yes ☒ No

**Explain:**

**Archive Flag:**

☐

Caption:

File Name:

Browse... No files selected.

[Save](#) [Cancel](#)

## Objective or Project Follow-Up and History Log

Once objectives are entered, it is not enough for the managers to simply work on the objective and not provide periodic follow-up reports to let all managers know if the objectives are improving and that the final desired objective will be achieved. Therefore, CIS allows for log entries for each objective so that we may have dated follow-up Reports on the status of each objective. To view the objectives log entries, click on the applicable objective then click view objective log that appears on top. This will display the objective logs and you may add new entries by clicking +New.

The screenshot displays the CIS interface. On the left, a list of objectives is shown. The first objective, ID: 1, is selected. Its details are as follows:

- Objective Information**
- ID: 1
- Issue Type: Performance
- Customer/Supplier:
- Process: Product Quality
- Objective Date: 07/17/2019
- Desired Date: 07/17/2019
- Managers Responsible**
- Managers Responsible: Samantha Welch
- Objective Criteria**
- Measurable Criteria: 95
- Current Measurement: 75
- Desired Measurement: 100

The second objective, ID: 2, is also listed:

- Objective Information**
- ID: 2
- Issue Type: Quality
- Customer/Supplier:
- Process: Implementing CIS
- Objective Date: 11/18/2019
- Desired Date: 02/28/2019
- Managers Responsible**
- Managers Responsible: Peter Sanderson
- Objective Criteria**
- Measurable Criteria: % Implemented
- Current Measurement: 10
- Desired Measurement: 80

On the right, the 'Add Objective Log' form is shown. It includes the following fields:

- Objective Log ID:** New LOG
- Log Entry Date:** 02/06/2020
- Objective Cost:** \$ 0.00
- Completed By:** Select Manager...
- Status:**

Buttons for 'Save' and 'Cancel' are at the bottom of the form.

A small screen shall pop-up to allow the entry of the following information:

- Date of Entry
- Cost of steps taken. For example, if 30 people were trained, you may enter the total cost of the training
- Verified by - Manager
- The current status of the objective (steps taken to further achieve the objective)
- Click Save

## Completing an Objective

The manager or managers that are responsible for achieving the objectives must edit the objective once it has been achieved to flag the objective complete. If the completed flag is not clicked, CIS will continually remind the managers of objectives that are past due.

To edit an objective, click on Quality Management, and then click on objectives. Click "Edit" on the applicable objective. Enter the following information:

Click "Yes" to objectives achieved and make one final entry in the log explaining the latest measurements and why the objective is considered close (see objective follow-up above).

## Calibration/Maintenance/Repair

### Overview

The Calibration/Maintenance/Repair App is designed to manage all your calibration, maintenance and repair requirements including recall. This feature may also be used to manage tests/inspections that must be done on a periodic basis such as a monthly inspection. The costs may also be recorded and reported in Reports and Graphs Financial Report. Version 5.0 allows for uploads of Calibration Certificates.

### Entering a New Instrument or Equipment to be controlled (managed)

Click on Management Tools/Calibration/Maintenance/Calibration/Maintenance Details and then click +New. Enter the following information:

- Manager responsible to ensure calibration, maintenance or repair is performed periodically (Note, CIS will always advise this manager 14-days in advance of a due date by e-mail – Recall Notice)
- Date record set-up
- Instrument/Equipment Description or if it is a test, enter the test title
- Instrument/Equipment Serial Number. If it is a test/inspection, enter test or inspection description one more time (this will be important when selecting from the log afterwards)
- Instrument/Equipment Location. If it is a test/inspection, enter the department where the test or inspection is performed
- Instrument/Equipment manufacturer. If it is a test/inspection, Test or Inspection
- Enter the Instrument/Equipment measurable increments (inches, lbs., etc.). If it is a test/inspection, enter test/inspection
- Enter the instrument's accuracy (+/- 1 lbs. etc.) or if it is equipment or test, you may enter N/A
- Enter the Calibration Reference Standard (NBS, NIST, etc.) or for equipment maintenance enter N/A. If it is a test/inspection, enter the applicable procedure
- Enter the procedure or reference a procedure for the calibration/Maintenance. The procedure may be a supplier's procedure that performs the calibration. If it is a test/inspection, enter the forms and/or any other notes
  - Snippets are very useful since often you may have many of the same instruments and the procedure can be imputed using a quick snippet
- Enter the supplier who performs the calibration or maintenance. Note, for a supplier to appear in this selectable box, they must be approved and be on the Approved Vendors List in CIS (See Vendors). If the instrument is no longer in service, you may enter the date retired in the last entry
- Add an asset Number
- Enter the advanced notice that you want CIS to send notification for Calibration and/or Maintenance in Days
- Upload a file or procedure, when desired
- Click Save

## Add Calibration, Maintenance or Repair Input Form

**Add Calibration/Maintenance** [Cancel](#) [Go Back](#)

\* Indicates required field

**Equipment ID:**  
New Equipment

\* **Manager Responsible For Calibration:**   
Select...

\* **Date Record Set-Up:**   
02/06/2020

\* **Instrument/Machine Description:**

\* **Instrument/Machine Serial Number:**

\* **Instrument/Machine Location:**

\* **Instrument/Machine Manufacturer:**

**Instrument/Machine Measurement Increments:**

**Instrument/Machine Accuracy +/-:**

**Calibration/Maintenance Reference Standard:**

\* **Calibration/Maintenance Procedure:**

**Calibration/Maintenance By:**   
Calibrated In House

**Instrument/Machine Retired Date:**

**ASSET Number:**

\* **Advance Calibration Notice Days:**   
14

\* **Advance Maintenance Notice Days:**   
14

**Caption:** **File Name:**  
  No files selected.

[Insert](#) [Cancel](#)

This entry is the master record for the instrument or equipment and should never be deleted unless it is just a wrong entry. When instruments are retired, we do not delete the record since during a recall of product, this information may be very helpful.

Once the instrument is entered the last calibration, maintenance or repair information must be entered into the calibration, maintenance or repair log so that CIS will begin to track the calibration, maintenance or repair dates and issue recall notices prior to the next calibration, maintenance or repair due date.

Calibrations, maintenance, and repairs due will appear on the applicable manager's action items and on the master calendar.

## Entering Calibration Details in the Calibration Log

Select the applicable instrument/machine then click View Calibration Log for the applicable instrument, test or inspection.

The screenshot shows the top of the Calibration Log interface. At the top, there are filters for 'Show Retired Items' (unchecked), 'Manager' (set to 'All'), and 'Calibrated By' (set to 'Calibrated In House'). Below these is a 'Search In' dropdown set to 'All' and a 'Submit' button. A blue navigation bar contains links: 'New', 'Edit', 'Delete', 'Work Order ID: 0Duplicate', 'View Calibration Log' (highlighted with a red box), 'View Maintenance Log' (highlighted with a red box), and 'View Repair Log' (highlighted with a red box). To the right of these links are 'View Uploaded files', 'Sort By: ID ->', and 'Total Records: 1'. On the far right is an 'Items Per Page' dropdown set to '25'. Below the navigation bar, on the left, is a small icon of a document with a checkmark. To its right is the 'Equipment Information' section, which includes: 'ID: 1', 'Instrument/Machine Serial Number: 113355', 'Managers Responsible' (Manager Responsible For Calibration: Samantha Welch), 'Procedure' (Calibration/Maintenance Procedure: Check every 6 months), and 'Details' (Instrument/Machine Manufacturer: Welch-Allyn, Instrument/Machine Measurement Increments, Instrument/Machine Accuracy +/-, Next Calibration Due Date, Next Maintenance Due Date :09/27/2019).

Then click Add Calibration Log from the top menu and enter the following information:

The screenshot shows the 'Add Calibration Log' form. The title bar says 'Calibration Log'. Below it, a red asterisk indicates required fields. The form is titled 'Calibration Log ID : New Calibration Log'. It contains the following fields: 'Equipment ID:' with a value of '1'; 'Instrument/Machine Serial Number:' with a value of '113355'; 'Calibration Cost:' with a value of '\$ 0.00'; 'Calibration Performed:' with an empty text box; 'Calibration Certificate Number:' with an empty text box; 'Calibration Certificate:' with a 'Browse...' button and the text 'No file selected.'; 'Calibration Certificate OK Flag:' with an unchecked checkbox; 'Repair Description:' with a large empty text area; 'Calibration Due Date:' with a date picker and radio buttons for 'Onetime', 'Weekly', 'Monthly', 'Quarterly', and 'Yearly' (all unselected); and 'Calibration Accepted by:' with an empty text box. At the bottom are 'Insert' and 'Cancel' buttons.

- Enter Calibration Cost
- Enter the date of calibration, test, or inspection or the last known date
- Enter the calibration certificate number or test report number

- Upload a scanned copy of certificate or report of maintenance
- Review the certificate and ensure that it is complete and correct. If it is, click the Certificate OK Flag
- Describe any repair or adjustments performed such as adjustments made, cleaning, etc.
- Select the next calibration, test or inspection due date including the period such as weekly, monthly etc.
  - Note, once this is selected for the first time, the calibration will be planned up until the last calibration date entered. For example, if you entered monthly for 12 months, the calibration would be scheduled for 12 months
  - When performing the calibration, you should always verify the log to ensure that there are additional dates planned. Below is an example of calibration planned between 03/25/2011 to 06/24/2011 on a monthly basis. The first calibration in the example was completed on 03/17/2011
  - If there are no further calibration plans, you may schedule additional ones
- Enter the name of the person who verified and accepted the calibrations then click Save

CIS will send out a reminder e-mail prior to the next calibration due date and a serious reminder on the due date (Recall Notice). The amount of advance warning is set in the main instrument record.

### Entering Maintenance Log Details

Entering the maintenance details works like calibration except for the built-in costing. In the maintenance, you may select from products entered in the product database under Vendors and you may also select labor rates (see Administration Criteria to set the labor rates). CIS will calculate the total cost based on the hours worked and materials selected that were used in the maintenance process such as an oil filter, oil, air filter, etc....

Maintenance Log ID : 1

Equipment ID:  
1

Labor Rate:

Hours:

Item No	Product	*Quantity	*Price/Unit	Total Price	Action
1	Filter 34	20.00	20.00	400.00	
2	Strap Kit	2.00	20.00	40.00	

Material Cost:

Labor Cost:  ← Calculated based on Hours x Labor Rate/Hour

### Entering Repair Log Details

Entering repair details works the same as the calibration except one must click view repair log then proceed in the same manner as for calibration (described Above).

### Master Equipment Repair and Maintenance Cost Report

CIS can print out a complete cost report for all your instruments or only for specific instruments. This report includes the costs associated with the calibrations, repairs and maintenance and any work orders that were issued for repair or maintenance for the instrument. This report is very useful to evaluate the efficiency of instruments and/or machines. Click Management Tools/Calibration/Maintenance/ Print Equipment Cost Report then select the instruments and/or machines that you want included in the report.

hs	Management Tools	Work Orders	Sales And Marketing	Logout
	Meetings/Audits			
	Objectives			
	Calibration/Maintenance		Calibration/Maintenance Details	
	Vendor Management		Print Calibration Maintenance Master List	
	Human Resource Management		Print Equipment Cost Report	
	Special Requirements			

## Printing Instrument/Machine Cost Report

CIS will report the cost of calibration or maintenance, repair and any repair performed by issuing a work order so that there is one total cost to date for that instrument or machine. Under/Maintenance select Print Equipment Cost Report and select the instruments/machines to be included in the report.



Instrument/Equipment Cost Summary Report					
Instrument Name: Instrument 1 Serial Number: 1234 Asset Number: 1					
<b>Calibration Cost:</b>					
Date	Log ID	Calibrated By	Cost		
05/30/2018	55	Peter	\$20.00		
Sub Total:			\$20.00		
<b>Maintenance Cost:</b>					
Date	Log ID	Performed By	Labor Cost	Material Cost	Total
	17		\$1800.00	\$0.00	\$1800.00
Sub Total:			\$1800.00	\$0.00	\$1800.00
<b>Repair Cost:</b>					
There is no log record found					
<b>Work Order Cost:</b>					
Date	Log ID	Performed By	Labor Cost	Material Cost	Total
02/13/2018	1	Samantha Welch - CIS Tester	\$1.00	\$1.00	\$2.00
Sub Total:			\$1.00	\$1.00	\$2.00
TOTAL OF ALL: \$1822.00					
<small><b>Note:</b> This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was printed</small>					

## Printing Calibration or Maintenance List and Stickers

Under/Maintenance select Print calibration/maintenance list and you will be able to select a date range and if you want a report on items for calibration or maintenance. This report is excellent for listing all items due with their location.

Due Date From: 02/06/2019 To: 02/06/2020  
Select Report Calibration Due Date Report  
[Render](#) | [Print Report](#)

**Calibration Due Date Report**

Due Date From: 02/06/2019 To: 02/06/2020  
Select Report Maintenance Due Date Report  
[Render](#) | [Print Report](#)

**Maintenance Due Date Report**

## **Vendor/Supplier Management and Inventory Management**

### Vendor/Supplier Management Overview

The vendor/supplier management is designed to manage vendors/supplier approvals and periodic re-evaluations to ensure that all vendors/suppliers continually meet the organization's requirements. In addition, CIS Software can issue purchase orders to Approved Vendors by e-mail or to be printed. There is also a Vendor Portal for Vendors to complete to be considered for approval. Once approved they can be automatically entered into your user table in CIS by a click of a button.

## Supplier Surveys

The Supplier survey database table includes a Supplier portal. A portal is an input screen that is not within the secure login environment and can therefore be accessed by anyone using a browser and following a link to the portal. Therefore, you may use this link on your web page, in an e-mail or a letter to your Suppliers requesting input to be considered for approval. The Supplier Survey includes a comprehensive set of questions to completely evaluate your supplier and when completed online will be sent by e-mail to the selected managers in your organization. See criteria in Administration to set these managers.

The link will be the link to your CIS system followed by “/supplier\_survey”.

Example, if my link to CIS is <https://cisdemo.continuousimprovementonline.com> then the link to the Supplier survey portal will be [https://cisdemo.continuousimprovementonline.com/supplier\\_survey](https://cisdemo.continuousimprovementonline.com/supplier_survey)

Upon receiving an e-mail notification that a supplier has completed a survey, the manager shall evaluate the supplier and may approve them by selecting the supplier in Management Tools/Vendor Management/Supplier Survey and then click edit.

The screenshot shows a web application interface with a table of suppliers. At the top, there is a navigation bar with buttons for '+ New', 'Edit' (highlighted in red), and 'Delete'. To the right of these buttons, it says 'Sort By' and 'Total Records: 1'. Below the navigation bar, there is a dropdown menu for 'Items Per Page' set to '25'. The table has a checkbox column with a red box around the checked checkbox. The table contains one record with the following details:

<input checked="" type="checkbox"/>	<b>Company Name:</b>	Supplier
	<b>Address:</b>	123 Demo Drive
	<b>Contact Name:</b>	Samantha Welch
	<b>Title:</b>	President
	<b>Date Survey Completed:</b>	7/12/2019 12:00:00 AM

At the end of the form there is an area to enter any conclusion notes and then select “Add Supplier/Vendor”. This will automatically add this supplier to your CIS User’s Table. However, you will still need to add them to the Approved Supplier Register (ASR), if that is what you want. You may have suppliers in CIS so that they are selectable for orders, complaints and such but you may not want all to be under control of the Approved Supplier Register (ASR).

## Entering an Approved Vendor/Supplier to the ASR

Click Management Tools/Vendor Management/Vendor Details and click +New and enter the following information:

- Select supplier name. The supplier must first be entered in the user’s section by the administrator to appear in this selectable field. Please note that suppliers do not have access to this system, even if they are entered as a user in the user section. See System Set-Up
- Enter the services or products that the supplier/vendor is approved to provide to the organization
- Describe the methods used for approval (for example, reviewed references, certified to ISO 9001:2000, or performed on-site audit)
- Select the manager who approved the supplier,
- Enter the date that the supplier should be re-evaluated and click Save

The screenshot shows the 'APPROVED SUPPLIER REGISTER (ASR)' interface. On the left, there is a sidebar with 'Management Tools' and 'Vendor Management' expanded. The main area displays a table with columns for 'Supplier Survey', 'Vendor Details', and 'Print Vendor Records'.

The new vendor will now appear on the Vendor/Supplier Management log that indicates that they are approved (Approved Vendor’s List).



**Add Vendor**

\* Indicates required field

**Vendor ID:**  
New Vendor  
[Cancel](#) [Go Back](#)

\* **Supplier Name:**

\* **Services/products approved:**

\* **Method Of Approval:**

\* **Approved By:**

**Re-evaluation date:**

**Archive Flag:** ☐

**Caption:**  **File Name:**   No files selected.

[Save](#) [Cancel](#)

**Note:** When starting to use CIS, contact your consultant to learn how to import vendors directly.

#### APPROVED SUPPLIER REGISTER (ASR)

Supplier: All Approved By: All

Search In: All

Show Archived: ☐

Sort By: ID - Total Records: 1

Items Per Page: 25

Vendor Information	Vendor Address	Approved Services/Products	Approval Method
ID: 1 Supplier Name: Supplier 1 - Re-evaluation date: 07/31/2019 Approved By: Samantha Welch	123 Demo Drive 4237168373 samantha_welch@outlook.com	batteries	ISO

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## Re-Evaluating Vendors/Suppliers and Making Log Entries

Click Management Tools/Vendor Management then select the vendor that you wish to re-evaluate or make a log entry. Click View Evaluation Log that appears on top for the applicable vendor/supplier then click +New on the top menu and enter the following information:

- Re-evaluation Date, the next date for re-evaluation
- If you do not re-evaluate by a period of time but rather by a trigger of events, set this date to a day and month in year 2100 so that you never receive re-evaluation e-mails
- Describe the method or results of the re-evaluation such as no Non-Conformity, no price increase and an excellent service history
- Person accepting the vendor for an additional period
- You may upload ISO certificate, documents, pictures or videos. This may be useful to maintain audit records, correspondence and/or other useful agreements that pertain to the supplier

Supplier: All Approved By: All

Search In: All

Show Archived: ☐

[New](#) | [Edit](#) | [Delete](#) | [Archive](#) | [View Evaluation Log](#) | [View Uploaded files](#) | Sort By: ID - | Total Records: 1

Items Per Page: 25

Vendor Information	Vendor Address	Approved Services/Products	Approval Method
<input checked="" type="checkbox"/> ID: 1 Supplier Name: Supplier 1 - Re-evaluation date: 07/31/2019 Approved By: Samantha Welch	123 Demo Drive 4237168373 samantha_welch@outlook.com	batteries	ISO

CIS will again send out an e-mail reminder 14 days prior to the vendor/supplier re-evaluation date.

**Note:** Many organizations do not evaluate suppliers periodically but rather when required by monitoring the supplier's performance which can be done in CIS in the Receiving Inspection App. In these instances, the vendor log is used more for supplier correspondence since it is quick, simple and you may upload files. If this is the case, you should change the wording to correspondence log in your CIS (administrator or CIS Consultant).

## Edit Vendor Approval Log Form

**Edit Vendor Log**

\* Indicates required field

**Vendor Log ID:**  
1

[Cancel](#) [Go Back](#)

\* **Reevaluation Date:**  
07/31/2019

\* **Reevaluation Results:**

Re-evaluation Details

Correspondence details:

Correspondence Notes

\* **Accepted By:**  
Peter Sanderson

**Caption:** **File Name:** [Browse...](#) No files selected.

[Save](#) [Cancel](#)

## Printing Vendor/Supplier Report Card

CIS maintains a report card for the vendors/suppliers based on the information collected from incoming inspection and from SCARS issued in customer Feedback. You may view and print the report card for a vendor by clicking Management Tools/Vendor Management/Print Vendor/Supplier Report Card.

## Product Database for Purchasing, Inspection and Inventory Management

In order to automatically order products and to receive them into inventory you must add the products to the product database. Click Management Tools/Vendor Management/Products then click +New.

Home Document Management Quality Input Data Accident/Incident Reports And Graphs **Management Tools** Risk and Performance Administration HELP Logou

Show Archived: ☐ Product Category: All

[New](#) Sort By:

**Vendor Management**

**Products**

<input type="checkbox"/>	Product Name	Product Category	Description	Unit	Price/Unit	Receiving Inspection	Max Allow
<input type="checkbox"/>	Batteries	Sub Product	AA and AAA batteries	Each	12.00	check for open package	100.00
<input type="checkbox"/>	USB Mini	Ordered Material	Cable USB	ft	3.00	Count	100.00
<input type="checkbox"/>	Filter 34	Ordered Material	Filter 34	Each	20.00		500.00
<input type="checkbox"/>	P/N 45678	Ordered Material	OGT Cables	ea	50.00	Visual,	5.00
<input type="checkbox"/>	Strap Kit	Ordered Material	Strap Kit	ea	20.00	Visual Count	50.00
<input type="checkbox"/>	Case	Ordered Material	Tablet Case	ea	20.00	Visual and Count	50.00











Supplier Survey  
Vendor Details  
Print Vendor Records  
Print Vendor/Supplier Report Card  
Order Details  
Print Order Records  
Manage Inventory

Peter Sanderson

Enter the:

- Product Category. This is used for sorting between groups of products such as product you manufacture versus raw materials. You may set-up the product categories in Administration under criteria
- Product Name

- Description
- Select subcomponents if required. This is when you want CIS to automatically create a pick list of products needed to assemble this product. See video help for more details. You can enter as many kitting parts with the quantity required to assemble the product. For example, if you require 10 screws and 3 boards and 1 cable, these can be entered so that when you receive an order for the product, CIS will automatically create the pick ticket and calculate the quantity of sub components required for your order and remove them from inventory when the order is placed.
- Unit
- Price per Unit
- Maximum Allowed Unit (this is the maximum that a manager may order)
- Minimum Inventory (CIS will notify the manager when items fall below this minimum inventory)
- Approved By

*Product	*Quantity	Action
Computer Case	1	 
Computer Sound Card	1	 
Computer Power Supply	1	 
Computer 2 GB Ram	4	 
Computer Case Screws	10	 

...

Add Product/Service

\* Indicates required field



[Cancel](#) [Go Back](#)

\* **Product Category:**

Ordered Material

\* **Product Name:**

\* **Product Description:**

*Product	*Quantity	Action
Select Product		 

\* **Unit:**

\* **Price/Unit:**

**Receiving Inspection:**

\* **Max Allowed Unit:**

\* **Minimum Inventory Require:**

\* **Approved By:**

Select Approved By

**Archive Flag:**

☐

[Save](#) [Cancel](#)

**Note:** When viewing the products, you may view them buy category by selecting the category on top.

Show Archived: ☐ Product Category: All

[New](#)

## Creating a Purchase Order

To create a purchase order, click on Management Tools/Vendor Management/order Details then click +New. Purchase orders can only be created for vendors that are approved and in the system.

Complete the input form with the following information:

**Note:** CIS will complete the PO Number automatically and the supplier's address information (as entered in users).

- Date
- Supplier
- Required Department
- Department Budget Code
- Manager

Supplier: All Manager: All  
Search for: All Submit  
Show Archived: ☐  
Sort By: Supplier Total Records: 3  
Items Per Page: 25  
New  
Order Details Information  
ID: 1  
Supplier: Supplier 1  
Manager: Peter Sanderson  
Required by Department: Quality  
Department Budget Code:

## Sample Input Form



Add Purchase Order Cancel Go Back  
\* Indicates required field  
\* Date: 02/06/2020  
P.O. Number: New P. O. Number  
Internal #:  
\* Supplier: Select Supplier  
Supplier Address:  
Supplier Address 2:  
Supplier Country:  
Supplier e-mail:  
Supplier Phone:  
Required by Department:  
Department Budget Code:  
\* Manager: Select Manager...  

Item No	Description	*Unit	*Quantity	Receiving Inspection	*Price/Unit	Total Price	Action
1	Select Product or		0		0	0	

  
Special Shipping Instructions:  
Due Date:  
Terms:  
Archive/Paid:  
Insert Save & Send PO Email Cancel

Once this information is entered, you may then select the products or enter unique products that were not entered into the product database. If the product was in the Product Database and is selected, CIS completes the specific information such as units, price and Receiving Inspection. For unique items you may enter the:

- Unit
- Quantity
- Description
- Inspection Requirements
- Price

Item No	Description	*Unit	*Quantity	Receiving Inspection	*Price/Unit	Total Price	Action
1	Computer Motherboard or Computer	each	0.00		200.00	0.00	 

Special Shipping Instructions:

At this point you may click the + Action Button to add more line items. When finished, complete the input form as follows:

- Special Shipping Instructions
- Due Date
- Terms and check if you want the purchase order to be sent immediately to the supplier by e-mail

**Note:** You may enter one or more-line items for each purchase order.

**Note:** There is an Insert or Save & Send PO Email. This allows one to start or edit a PO without sending it to the supplier each time. When save and send PO E-mail is selected, CIS sends the PO to the supplier.

### Printing a Purchase Order

To print a purchase order, click on Management Tools/Vendor Management/Print Order Records, select one or more purchase orders to print and click print.

Once print is clicked, a Purchase Order will be displayed in a separate window to review to ensure that it is correct. To print the orders, click the print button on the report:

#### Printed Purchase Order Form



Purchase Order						
To: supplierbeta 1730 E. Park Ave., Chandler. AZ 85225 480-688-3193				From: Controls Consulting Beta 2786 E. Desert Broom Place Chandler AZ 85249 602-445-9400		
Date: 06/14/2006				Issued By: (manager): bretta		
Purchase Order Number: 1				Department:		
Date Required: 06/09/2006				Department Code:		
Item No	Unit	Quantity	Price/Unit	Description	Receiving Inspection	Total Price
1	1	1.00	10.00	scale	certificate included	10.00
Tax (0%):						0.00
Grand Total:						10.00
Shipping Instructions:		None				
Terms of Payment:						

**Note:** The vendor's tax rate must be entered in the set-up. See Set-up the Company Information.

### Creating a Pick Ticket (Releasing a Job)

In order to create a pick ticket and use the job release and inventory management system to automatically deduct from inventory the components required to assemble/manufacture the product, you must first create the components/raw material in the product database. If not, you will not see the build product or Product History options when selecting a product to release.

Click on Management Tools/Vendor Management/Products. On the top menu, select the category where the main product to be released is part of such as "Main Product". A list of all the main products will be displayed then select the product that you want to release.

Home   Document Management   Quality Input Data   Reports And Graphs   <b>Management Tools</b>   Work Orders   Sales And Marketing   Logout									
Show Archived: <input type="checkbox"/> Product Category: Main Product									
+ New   Edit   Delete   Archive   Build Product   Product History									
Sort By: Product Description   Total Records: 2									
Items Per Page: 25									
<input type="checkbox"/>	Product Name	Product Category	Description	Unit	Price/Unit	Receiving Inspection	Max Allowed Unit	Minimum Inventory Require	Approved By
<input checked="" type="checkbox"/>	Computer Super Model #1	Main Product	Computer	each	85.00		500.00	25.00	Peter Sanderson
<input type="checkbox"/>	Computer Advotech # 2	Main Product	High End Computing and Low End Pricing	Each	800.00	N/A	200.00	2.00	Peter Sanderson

Once selected, you may then click Build Product above which will open a pop-up window that allows you to enter the:

- Job Number
- Customer
- Quantity to Release
- Date

If there are any components/raw material that is not available in inventory, CIS will not release the order and will display a warning detailing the items missing.

If there are sufficient subcomponents/raw material in inventory, then CIS will accept the order and automatically remove those components necessary to build the order from inventory. For example, if 10 screws are required for each product and 5 products are released, CIS will deduct 50 screws from the inventory and that will also appear on the Pick Ticket.

## Printing Pick Tickets/Assembly Parts List

Click on Management Tools/Vendor Management/Products and then select the main product that you want to print the pick ticket. Once selected, click on Product History on top. This will display a list of all orders including the latest one just entered. Click on the current order that you just entered then click Print on top.

Customers:  << Back to Products

From:  To:

Search In:

[Edit](#) | [Print](#)

Sort By | Total Records: 1 |

<input type="checkbox"/>	Product Name	Job Number	Customer	Quantity	Date
<input checked="" type="checkbox"/>	Computer Super Model #1	201	Peter Sanderson	5	12/23/2013

## Sample of Pick Ticket or Assembly List



Bind Product History		
Product Name: Computer Super Model #1		
Job Number: 201		
Customer Name: Peter Sanderson		
Quantity: 5		
JOB DATE: 12/23/2013		
Product Part Description:		
Product	Description	Quantity
Computer Motherboard		5
Computer Processor		5
Computer Super Model #1		5
Computer Power Supply		5
Computer Case Screws		50
Computer Hard Drive		5
Computer 2 GB Ram		20
Computer Sound Card		5
Computer Graphics Card		5
Computer Manual Kit		5

**Note:** This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was printed

## Managing Inventory

The inventory management system can be inputted from the receiving inspection directly to add products to inventory (see inspection), from Product Release to remove components/raw material from inventory (see Pick Tickets), from ship from inventory (see ship from inventory), and directly from the Manage Inventory App.

Click on Management Tools/Vendor Management/Manage Inventory/Inventory Details to display a current list of all inventory items. Items that have a red quantity indicate that the items are below minimum inventory set levels. From this list, you may adjust any item or access details of the item. Adjusting may be a result of a correction due to an error or from an inventory count. Details will show all transactions and traceability to job numbers.

Show Inactive Products: ☐

[+ New](#) | [Adjust](#) | [Detail](#) Sort By | Total Records: 18 |   

Items Per Page: 25

### Adjusting Inventory

Click on Management Tools/Vendor Management/Manage Inventory/Inventory Details then select the product you wish to adjust and then click adjust on top.

<input type="checkbox"/>	Product Name	Net Qty	Last Update Date
<input type="checkbox"/>	Web Page Design	500	10/22/2013
<input type="checkbox"/>	Bolts 4556	77	12/23/2013
<input type="checkbox"/>	Pipe Description	45	09/09/2013
<input type="checkbox"/>	wire	13	12/23/2013
<input type="checkbox"/>	Electric Motor	100	10/22/2013
<input checked="" type="checkbox"/>	Computer Motherboard	5	12/23/2013

The adjust product pop-up window will appear where you may adjust up or down or enter in or out. We use the term adjust to indicate an adjustment that resulted from a count and there is no other explanation for the adjustment (mysterious loss or appearance). We use the term in or out to indicate the quantity was adjusted for a known reason such as Bob went into inventory and took two parts to give to a client as a sample. When making adjustments, it is recommended that you make a clear note explaining the reason.

Adjust Product

\* Indicates required field

\* Product Name:


Computer Motherboard

\* Type:

Adjust Up

\* Quantity:

\* Transaction Date:

12/23/2013 

Transaction Note:

Save Cancel



## Inventory Details

Click on Management Tools/Vendor Management/Manage Inventory/Inventory Details then select the product you wish to adjust and then click Details on top. This report will show all the transactions including Job Numbers if used as part of an assembly or manufacturing batch. Once this detailed list is displayed, you may click other products to display on top from the Products selectable list.

Products: Computer Motherboard << Back to Inventory Details

New Sort By | Total Records: 9 |

Items Per Page: 25

<input type="checkbox"/>	Product Name	Quantity	Inspections	Job Number	Last Update	Type
<input type="checkbox"/>	Computer Motherboard	0.00			09/03/2013	Adjust Up
<input type="checkbox"/>	Computer Motherboard	12.00	17		09/04/2013	In
<input type="checkbox"/>	Computer Motherboard	4.00		12545	09/24/2013	Out
<input type="checkbox"/>	Computer Motherboard	100.00	63		10/19/2013	In
<input type="checkbox"/>	Computer Motherboard	10.00		7877	09/27/2013	Out
<input type="checkbox"/>	Computer Motherboard	1.00			09/27/2013	Adjust Down
<input type="checkbox"/>	Computer Motherboard	97.00			10/22/2013	Ship from Inventory
<input type="checkbox"/>	Computer Motherboard	10.00			12/23/2013	Adjust Up
<input type="checkbox"/>	Computer Motherboard	5.00		201	12/23/2013	Out

## Ship from Inventory

You can also ship products that are in your inventory. Click on Management Tools/Vendor Management/Manage Inventory/ship from Inventory.

Enter the:

- PO Number
- Date
- Approved By
- Products and Quantities to Ship
- Date Shipped
- Shipping Approved By
- Notes

**Note:** When selecting products to be shipped, the quantity available in inventory is displayed in brackets next to the product. You may not ship more than what is available in inventory.

*Product	*Q
Computer Motherboard (Qty: 5)	5

Home Document Management Quality Input Data Reports And Graphs Management Tools

**Ship Product**

\* Indicates required field

\* Po Number:

\* Date Approved:

\* Approvedby:

Select Approved By

*Product	*Quantity	Date Approved	*Approved By	Action
Select Product <input type="text"/>	<input type="text"/>	12/23/2013	Select Manager <input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>

\* Date Shipped:

\* Ship Approvalby:

Select Ship Approved By

\* Shipment Notes:

Save Cancel

## Detailed Transaction Report

Click on Management Tools/Vendor Management/Manage Inventory/Transaction Detail Report. You may select the date period for the report and what product to include in the report. You may also print inventory transaction records by clicking Management Tools/Vendor Management/Manage Inventory/Print Inventory Transaction Records.

Home	Document Management	Quality Input Data	Reports And Graphs	Management Tools	Work Orders
------	---------------------	--------------------	--------------------	------------------	-------------

Transaction Date From: 12/01/2011 To: 12/23/2013 Submit

Product Name: Computer Motherboard

Sort By | Total Records: 9 |

Transaction Date	Product	Quantity	Type	Comments
09/03/2013	Computer Motherboard	0.00	Adjust Up	
09/04/2013	Computer Motherboard	12.00	In	
09/24/2013	Computer Motherboard	4.00	Out	
10/19/2013	Computer Motherboard	100.00	In	
09/27/2013	Computer Motherboard	10.00	Out	
09/27/2013	Computer Motherboard	1.00	Adjust Down	Broken during assembly Job 7769
10/22/2013	Computer Motherboard	97.00	Ship from Inventory	PO#: 978569 Approved: Peter Group Notes: Shipment Notes
12/23/2013	Computer Motherboard	10.00	Adjust Up	Added from client
12/23/2013	Computer Motherboard	5.00	Out	

## HR and Training

### Human Resource

CIS includes a system to plan, report and record employee performance reviews and a new system that associates groups of standard training with position titles so that when a new employee is added, CIS will automatically schedule the training and advise the applicable manager by e-mail of the plan. In addition, this version has a new employee training history report by employee.

### HR Overview

The HR Training App keeps records of all employees including the documentation, certificates, background checks and more. The App can be used to plan and execute training and to record all employees training. Training reports and cost analysis can be obtained at any time. However, please ensure that only information that is permitted to be kept by local and federal laws is stored and entered in this App. Also, be careful to only allow access (see users) to appropriate managers that have a need to know this information.

### Training Set-Up

The training must be set-up properly in order to function. Refer to the Administration/Training section at the beginning of this manual.

## Adding a New Employee

To enter the HR App, click on Management Tools/ Human Resource Management/Employee Details and click +New. When an employee is already added and want to edit, select the employee and the edit option will appear on top.



The following information may be entered into the CIS HR App:

- Employee Name - *(Required Field)*
- E-mail Address - *(Required Field)*
- Upload Employee Picture
- Employee Address – (Enter N/A if you do not want to enter address) - *(Required Field)*
- Employee Phone
- Employee Cell Phone
- Date of Hire - *(Required Field)*
- Start Date - *(Required Field)*
- Department - *(Required Field)*
- Responsible Manager - *(Required Field)*
- Position - *(Required Field)*
- Citizenship - *(Required Field)*
- Social Security Number
- Driver's License
- Other Identification
- Previous Employer
- Previous Position
- Length in months at previous position
- Reference Check Confirm box
- Reference check comments
- Upload background check file
- Comments
- Location
- Process/Department
- Position Title (Once selected and the record is saved, CIS will automatically schedule the training)
  - The scheduled training will appear on the manager's action items on their home page, the manager and employee will receive an e-mail and the training will appear in the master calendar.
- Upload of other scanned certificates, applications or other legal documents and identifications such as driver's license
- Click Save

### Add New Employee Input Form Sample Top Only

**Add Employee**

\* Indicates required field

[Cancel Go Back](#)

\* **Name:**

\* **Email Address:**

**Photo:**

No file selected.

**Home Address:**

**Home Phone:**

**Cell Phone:**

\* **Date Of Hire:**  
02/06/2020

\* **Start Date:**  
02/06/2020

**Continues**

### Performance Reviews

Click on Management Tools/ Human Resource Management/Employee Performance then +New. Once a new employee is entered, you may set-up a date for a performance review by selecting Add Performance Review. You may enter the date of the next review or select yearly for the next specified number of years, select the responsible manager and enter any comments. If it is the first review, you may use today's date in the Review Date field and in comments make a note that this is a new employee. CIS will advise the manager 7-days in advance of all employee performance reviews that are due. You may also use this to ensure that a manager checks for a current license or other such document and uploads the scanned version. By selecting yearly, you may ensure that these requirements are completed each year. The applicable manager always will receive e-mail reminder 7-days before it is due.

**Add Performance/Competency Review** [Cancel Go Back](#)

\* Indicates required field

\* **Employee Name:**

Select Employee

\* **Performance/Competency Review Date:**  
02/06/2020

**No Further Competency Reviews Required:**  
☒

**Next Performance/Competency Review Date:**

☐ Yearly Schedule

**Comments:**

\* **Responsible Manager:**

Select Manager

**File Name:**  
 No files selected.

[Insert](#) [Cancel](#)

To enter the results of the employee review, click on Management Tools/ Human Resource Management/Employee Performance then select the applicable employee and click edit the record on top. You may up-load a performance results checklist or form as well as make comments. If you want to schedule another performance review, you must add a new performance review (see above). If no other performance reviews are required, click No further Competency Reviews Required and leave the next date empty.

## Competency Report

The competency report will report all employees that have not received the training as required by their position. Click on Management Tools/ Human Resource Management/competency Verification Report. This will list all employees in a job description that have not received the required training for that job description. You may click on Reschedule all listed training and CIS will automatically reschedule all the missing training, send out e-mail notifications and place the training on the calendar.

Employee: All Employees [Print](#) [Reschedule all listed trainings](#)

Training Competency Verification Report Date: 02/06/2020

Employee Name	Position Name	Missing Training
Henry Blackwell	Inspector Junior	Coaching OJT 40 Hrs
Terry Brown	Inspector Junior	Coaching OJT 40 Hrs

## Competency Verification Matrix Report

Click on Management Tools/ Human Resource Management/ Current Competency Matrix to display a list of all employees and a list of their competencies. This will show the employees positions that they have received training for. So, when employees are cross trained, they may have multiple competencies. You may filter by employee or by position.

EmployeeID: All  
Select Position: ALL

| Total Records: 11 |

Items Per Page: 25

Employee Name	Qualified Job Positions
Blaine	Inspector Junior, Junior Tech
Bretta Kelly	Inspector Junior, Inspector Senior, Junior Tech, Senior Tech
Derek Tahamont	Safety Manager
Don Thompson	Lift Truck Driver, Junior Tech
Henry Blackwell	Junior Tech
Mr. Junior	Junior Tech, Senior Tech
Samantha Welch	
Scotty	Lift Truck Driver, Junior Tech
Sue Ann	Lift Truck Driver, Junior Tech
Terry Brown	Lift Truck Driver, Junior Tech
Tracey	QA Assistant

## Authorization Matrix

Click on Management Tools/ Human Resource Management/ Authorization Matrix to display a list of employees that have authorization to perform certain tasks such as sign purchase orders, approved NCR resolutions and so on.

The authorization must be manually populated by clicking New then completing the Manager's name, Date Authorized for a Process, the Process, and any comments. This should be done for each authorized process. You may authorize one manager multiple times for different processes. Once completed, you may filter by process or manager.

The screenshot displays the 'Add Record' form on the left and a table of existing records on the right.

**Add Record Form:**

- \* Indicates required field
- \* **Manager Authorized:** Select Manager...
- \* **Date Authorized:** [Date Picker]
- \* **Process Authorization:** Select
- Comments:** [Text Area]
- Save Cancel

**Table of Existing Records:**

Manager Authorized	Date Authorized	Process Authorization	Comments
<input type="checkbox"/> Peter Sanderson	Jul. 23, 2019	Purchase Order Approval	
<input type="checkbox"/> Peter Sanderson	Jul. 10, 2019	Nonconformity Resolution Approval	
<input type="checkbox"/> Samantha Welch	Jul. 23, 2019	Purchase Order Approval	
<input type="checkbox"/> Derek Tahamont	Jul. 25, 2019	Approve Safety Certificates	

## Establish and Planning New or Unique Training

Click on Management Tools/ Human Resource Management/Trainings/Training Details and then click +New. Select the employee or group of employees. You may also set-up yearly training for an employee or group of employees.

The following input screen will appear:

### Set-Up Training Input Form Sample of Top Only

The screenshot shows the 'Add Training' form with the following fields:

- \* Indicates required field
- Cancel Go Back
- \* **Location:** [Dropdown]
- Employee Name:** [Text Field]
- \* **Due Date:** [Date Picker]
- ☐ Yearly Schedule
- \* **Standard Training:** [Dropdown]
- Other Training:** [Text Field]
- \* **Hours:** [Text Field]
- \* **Trainer:** [Text Field]
- Comments:** [Text Area]
- Certificate Issued:** [Text Field]

Please remember that CIS will automatically set-up training for new employees. Therefore, there is no need to set-up the training for new employees. The set-up training is used for existing employees and new training.

You may set-up one standard training for multiple employees by holding down the Ctrl key and mouse clicking on all the employees that require the training. CIS will automatically schedule the training for each of the selected employees.

You must select a location and then the employees in that location will be displayed and selectable.

The following may be entered:

- Due date of training or yearly and the end date (CIS will remind the manager by e-mail 14 days before the training is due and it will appear on the calendar),
- Select the training type or if it is unique, select other and describe the training. Once selected, CIS will complete Hours, Trainer, Responsible manager, Cost of Training, and the Advance Notice Time as entered in the Administration HR Settings (See training Set-Up). If the training is a unique or different type of training that is not entered in the set-up, you will be required to complete:
  - Training length in hours
  - Trainer
  - Responsible manager for the training (will be reminded by e-mail)
  - Cost of training
  - Advanced notice to advise the responsible manager by e-mail

Once the training plans are entered, you can view and manage the training directly from the Training Details Page. You can view/print the training details of any planned training and review the status. You may also edit the training to complete the training record and upload the training certificate for the employee. The input screen for the edit function is more detailed than the original training set-up screen.

### Completing the Training Records

Performance and training confirmation may be entered individually in the Set as Complete Screen. However, you may also select multiple employees at the same time and complete the training in one step. For example, if the same training was given to 10 employees, you may select all the employees who received the same training by checking the check box on top which will select all the training. You may deselect any persons who did not attend or training that was not completed.

Once they are selected, click Set as Complete and Save:

The screenshot displays a web application interface for managing training records. At the top, there are filters for 'Employee: All', 'Training Criteria: All', and 'Manager: All'. Below these, a 'Show: Pending Training' dropdown menu is highlighted with a red box. To its right is a 'Filter By: Show All Trainings' dropdown. A 'Search In: All' field and a 'Submit' button are also present. Below the filters is a toolbar with buttons for 'New', 'Delete', 'Print Selected', 'Set as complete' (highlighted with a red box), and 'Sort By: Due Date'. The 'Total Records: 5' is displayed. On the right, 'Items Per Page: 25' is shown. The main content area lists three employees, each with a checkbox (all checked) and their training details. The details for each employee are identical: 'Employee/Due Date' (Brett Kelly, 02/13/2020), 'Training Details' (Location: Russell-1, Standard Training: ISO 9001:2015 Introduction, Other Training: , Hours: 30.00, Trainer: ), 'Completion Details' (Complete Date: , Cost of Training (\$): 1,200.00, Manager Responsible: , Performance Comments: ), and 'Employee/Due Date' (Derek Tahamont, 02/13/2020). The third employee is Henry Blackwell, also with the same details.

The following add/edit screen will appear:

Complete the record for the training and save. This will complete the training for all selected employees and each of their training files will be updated immediately. There is no need to complete training one employee at a time. Once completed, the training will then be considered complete and not pending. It will no longer show as due on the Master Calendar.

## Training Analysis and Review

In Training Details section, you may also view (Show) the training by selecting the following:

- All Training
- Training that is completed only
- Pending training that is planned
- Planned training that is overdue

Training may also filter the results further by:

- View All Trainings
- Hide Trainings in the Past
- Show Trainings in the next Month
- Show Trainings in the next Quarter
- Show Trainings in the last Quarter
- Show All Trainings

Additionally, the records can also be filtered by key words and searched in certain fields.

**Note:** Search criteria can be combined with the other filters to better pinpoint the records. However, remember to clear search information when you are completed.

## Employee Training History File

Click on Management Tools/ Human Resource Management/Trainings/Training Report. An employee's training history may be viewed and/or printed by selecting Training Report then select the employee. This report will list by date all the training that the employee received including the dates, hours, costs and the total cost. You may print this using Internet Explorer's print functions.

<a href="#">Home</a> <a href="#">Document Management</a> <a href="#">Quality Input Data</a> <a href="#">Reports And Graphs</a> <a href="#">Management Tools</a> <a href="#">Work Orders</a> <a href="#">Administration</a> <a href="#">Sales And Marketing</a> <a href="#">Logout</a>						
Employee: <span>All Employees</span>						
Sort By: Complete Date   Total Records: 321						
Name	Completed Date	Standard Training	Other Training	Hours	Training Cost	
HODGES, MICHAEL	10/26/2013	ISO Training	Other Training	2.00	35.00	
YEARIAN, CAROL	10/25/2013	Root Cause Analysis Training	Other Training	8.00	495.00	
WILSON, TERRANCE	10/25/2013	HACCP Training	Other Training	1.00	32.00	
YEARIAN, CAROL	10/25/2013	Root Cause Analysis Training	Other Training	8.00	495.00	



## Printing Detailed Training Records

There are two options for printing training records.

Option One: (“Print Training Records” under Training)

There are two reports that may be printed (remember that these can be modified in Template Editor).

1. Training Report
2. Training Certificate

Select the employee(s) in the Training Details then the print option will appear on top.

Option Two: (“Training Report” under Training)

Select All or one employee and CIS will display all of the training performed including training, hours, cost and grand total. Once displayed, use the export to Excel Icon to export the report.

## Special Requirements

### Adding/Editing Special Requirements

Organizations may use this section in a variety of methods to best suit their needs. For example, Special Requirements may be entered:

- By Customer
- By Product
- By Process, or
- By Service

As an example, if special requirements are set-up by customer, you may then have a complete file by customer including customer specific documents, forms, pictures, and instructions. To add a new special requirement, Click Management Tools/Special Requirements/Product Details then Click +New. The following screen will appear to enter the general information and title of the requirement in Product Name. Note: if you plan to enter special requirements by customer, then enter the customer name (again) in the product name.

Once you have completed the general information, you may then click Add Requirements to begin adding the special requirements for the customer, process, product, or service:

This screen allows you to add a requirement name (title), upload a document or picture and enter the requirements in the memo section. CIS automatically date stamps the requirement or revision. You may also select from managers, customers and/or suppliers to be

**Special Requirements** [Cancel](#) [Go Back](#)

\* Indicates required field

Select Product: Batteries

\* Product Name: Batteries









\* Customer Company: Customer

\* Customer Email: peter.sanderson@outlook.com

\* Internal#: 3365

Last Date Revised: 07/10/2019

Filter By RequireType: All [Show Archive](#)

Req ID	Entered By	RequireType Name	* Document Name	Memo	Revised Date	Action
1	Peter Sanderson	Processing	 Browse... No files selected.	Received	07/17/2019	  
2	Peter Sanderson	Invoicing	 Browse... No files selected.		07/17/2019	  

Select Users to send Email

Select Managers:	Select Customers:	Select Suppliers:
Adams, Michael Ali, Wail Allen, Daniel Andrews, James	100, Chemin du Lac Mou 1350 Government Road Agnico Eagle-Kittla APPLETON MILLS	Supplier 1 Supplier 2 Supplier 3

[Save](#) [Save & Send Email](#) [Cancel](#)

advised by e-mail of any updates to this record. If you wish e-mails to be sent, select Save and Send E-mail instead of just Save.

**Note:** you may archive individual line items.

### **Additional Uses for Special Requirements**

In addition to maintaining special requirements for customers, products processes or services, this App may also be used to further maintain documents. For example, you may want to have all your product recipes by categories. In the following example, the recipes for each category may be uploaded and will be available instantly. There may be many different recipes for each category so that all Peach recipes would appear when Peach Recipes is selected

- Canned Peach Recipes
- Canned Prunes Recipes

Other categories for procedure management may be inspection procedures, laboratory procedures and any other group or groups of procedures.

## Customer Supplied Product (CSP)

Customer supplied product is a small database to maintain control of the customer supplied product. Click Management Tools/Customer Supplied Property and then click +New to add a new piece of customer supplied product and enter the following information:

- Date received
- Customer that owns the equipment
- Complete description
- Upload a document or picture that is applicable to the CSP
- Serial Number if applicable
- Special maintenance or calibration information
- Location of where in the company the equipment is stored and/or used,
- Any other Comments
- Date returned when applicable
- Picture, report or other document upload (Suggestion: a short movie on how to use)
- Click Insert

**Edit CSP**

\* Indicates required field

**CSP ID:**  
1  
[Cancel Go Back](#)

**Date Received:**  
07/17/2019

**Customer:**  
Customer

**Description of CSP:**  
Big wooden barrel

**Upload Picture or Doc:**  
Browse... No file selected.

**Serial number of CSP:**  
3356

**Special Maintenance or Calibration:**  
N/A

**Location of CSP:**  
Warehouse

**Comments:**

**Date Returned:**  
07/18/2019

**Caption:** **File Name:**  
Browse... No files selected.

[Save](#) [Cancel](#)

When the customer supplied product is returned to the customer, click on edit and enter the returned date.

## Sales and Marketing -

This App integrates operations and sales and will send out action items that are required to service the customer throughout the sales process and beyond to customer management and correspondence.

First click on Sales and Marketing then click on the little Sales and Marketing +New.

Once this display screen appears, you may add a new customer, edit customer information and start using the customer log.

### Add a New Customer

Click “Add” and complete the information in the input screen. However, please note that the customer must first be added as a user (see Users in Administration). Complete the new customer record as follows:

- Select the new customer
- Enter the contact method
- Enter referred by
- Enter the client type
- Enter the projected sign date. Once this date is entered, it can be revised. This is to help evaluate the accuracy of the salesperson’s ability to project closing contract dates. We can later analyze the projected closing dates and compare them with the actual closing dates
- Enter the salesperson assigned to this client
- Normally, the contract is not signed or closed at this point, therefore scroll down and upload the Outlook V-Card. Once the customer’s V-Card is loaded into the record, any other managers who access the record may click on the v-card then save and close so that the customer’s v-card will appear instantly in their own outlook contact database. This eliminates the need for each manager to type the contact into their outlook and ensures that all managers have the latest contact information
- Click Save to save the new record

**Edit CSP**

\* Indicates required field

CSP ID: 1

[Cancel Go Back](#)

\* Date Received: 07/17/2019

\* Customer:

Description of CSP: Big wooden barrel

Upload Picture or Doc: Browse... No file selected.

Serial number of CSP: 3356

Special Maintenance or Calibration: N/A

Location of CSP: Warehouse

Comments:

Date Returned: 07/18/2019

File Name: Caption: File Name: Browse... No files selected.

[Save](#) [Cancel](#)

### Entering Action Items and Customer Communications

Select the customer then click the Log Entry on top and select +New. Once the new customer is entered into the Sales and Marketing App, sales and customer service may then start using the log entries to manage the account. Quotations, documents, pictures and other information may be uploaded into the logs. The logs also include an area to enter:

Client Type: All Assign To User: All Closed By: All

Show Archived: ☐

Search In: All Submit

[New](#) [Edit](#) [Delete](#) [Archive](#) [Log Entry](#) Sort By: ID Total Records: 2 Items Per Page: 25

<input checked="" type="checkbox"/>	Sales Marketing Information ID: 2 Customer: Mine W
-------------------------------------	--

- Actions performed
- Customer Contact
- Customer Feedback
- Next Actions Required
- Actions assigned to
- Set reminders to ensure actions are completed. The responsible manager will be reminded twice in advance of when these actions are required to be completed
- Upload feature to upload quotations, communications, e-mails and more

Edit Sales & Marketing Log Entry

\* Indicates required field

**Sales & Marketing LogID:**  
1

**\* Action Performed:**

Talked with customer and they need their specifications reviewed

**\* Next Action Required:**

Derek to review and approve their specs

**\* Responsible Manager:**

Derek Tahamont

**\* Due Date:**

01/09/2020

**\* First Reminder:**

1 Days before the Due Date (0 = no email)

**\* Second Reminder:**

1 Days before the Due Date (0 = no email)

**\* Customer Feedback:**

Excited

**Archive Flag:**

☐

**Completed Flag:**

☐

Caption:

File Name:

No files selected.

[Save](#) [Cancel](#)

**Reviewing Customer Correspondence**

Below is an example of a Log history of sales. When there is an attached file, the attached file may be viewed by selecting the log entry then clicking the View Uploaded File link on top. This log may continue throughout the customer’s life cycle to record and have instantly available all conversations. E-mails received may simply be copied and pasted into the Customer Feedback field.

HomeDocument ManagementQuality Input DataReports And GraphsManagement ToolsWork

Sales Marketing ID#: 2 << Back to Sales Marketing

Show Archived: ☐

+ New | Edit | Delete | Archive | View Uploaded files | Sort By: ID | Total Records: 4 |

Items Per Page: 25

☐

☒ **Sales Marketing Logs Information**  
ID: 7  
Action Performed: Received Procedures from client  
Responsible Manager: Peter Sanderson  
Log Entered By: Peter Sanderson

☐

**Sales Marketing Logs Information**  
ID: 4  
Action Performed: met with client  
Responsible Manager: Grant Sharp  
Log Entered By: Peter Sanderson

☐

**Sales Marketing Logs Information**  
ID: 3  
Action Performed: Received Customer Specs and Requirements  
Responsible Manager: Grant Sharp  
Log Entered By: Peter Sanderson

☐

**Sales Marketing Logs Information**  
ID: 2  
Action Performed: Spoke with client and received Engineering specs  
Responsible Manager: Grant Sharp  
Log Entered By:

**Food Safety HACCP/Risk Analysis**

CIS has two separate versions of this App. One for food safety and the other for nonfood applications. Therefore, your App will be one or the other and not both. Both applications operate virtually the same but have different terminology and is a starting point for an organization to create a Risk Analysis System or Food Safety HACCP Plan.

Management ToolsFood SafetyAdministration

OR

Management ToolsRisk and PerformanceAdministration

## Step 1 – Prerequisites

Before creating your HACCP Plan/Risk Analysis it is required to review your current management system and work instructions/SOPs and identify these procedures as prerequisites to show that the basics are in place. Click on Food Safety/Prerequisites or Risk and Performance/Risk Prerequisites and then click new to create the prerequisites for your organization.

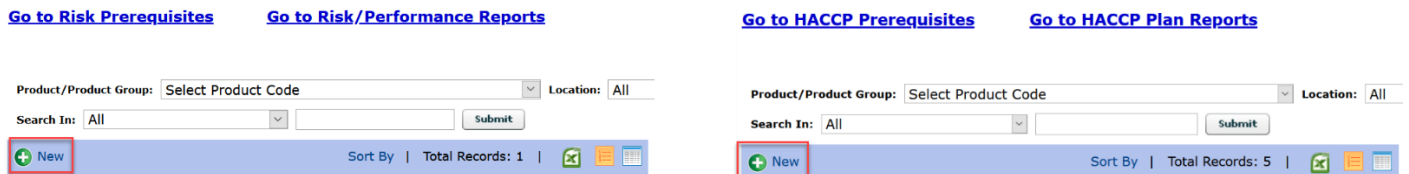


This will open the input screen for the prerequisites. The procedures or reference to those applicable may be entered here. Not all sections may be applicable in non-food organizations and this is an area for customization, and you should have a serious look at making this App more specific to your organization. You may have a different set of prerequisites by location, if that is applicable. *Often non-food organizations do not use the Prerequisite section and may remove it from the menu.*

The image shows a screenshot of the 'Add HACCP Prerequisite' form. The form has a blue header with the title 'Add HACCP Prerequisite' and a red asterisk indicating required fields. Below the header, there are sections for 'Approvals', 'Facility Information', 'Organizational Chart', and 'Sanitation Program'. The 'Approvals' section has three rows, each with a 'Name and Title' dropdown and a 'Date Approved' date picker. The 'Facility Information' section has a 'Location' dropdown and a 'Description' text area. The 'Organizational Chart' section has an 'Upload Organizational Chart' button and a 'Browse...' button. The 'Sanitation Program' section has a text area for 'Sanitation Applicable Documents'.

## Step 2 – HACCP Plan or Risk Analysis

Select New to create a HACCP or Risk Analysis.



Once selected you should complete the form for every Risk in your process. This will include the evaluation of the risk, assigning a Rating and identifying the monitoring processes, responsibilities and actions to be taken in the case the risk materializes including records and potential fraud in the process.

### Add Risk/Performance Plan

\* Indicates required field

[Cancel Go Back](#)

**\* Product / Product Group:**  
Select Product Code

**\* Location:**  
Select Location

**\* Process/Department:**  
Select Process/Department

**Process Step Number:**

**\* Identified Potential Risk:**  
Select

**Potential Risk Description:**

**Likelihood/Probability:**  
Select

**Severity:**  
Select

**Rating:**

**Basis for Decision:**

**Is this Risk fully controlled by a Prerequisite program?**  
Yes

**If Yes, Identify the program**

**Is this Risk eliminated by a subsequent process step?**  
Yes

**If Yes, Identify the process step**

**Can a viable product be produced if the process step fails?**  
Yes

**If Yes, that step must be considered a critical control point. Enter CCP number below. If No, This can be considered a Control Program.**

**CCP#**  
**If this Process Step has a CCP#, complete the following fields in blue**

**Monitoring Procedures**

[Cancel Go Back](#)

**\* Product / Product Group:**  
Select Product Code

**\* Location:**  
Select Location

**\* Process/Department:**  
Select Process/Department

**Process Step Number:**

**\* Identified Potential Hazard:**  
Select

**Potential Hazard Description:**

**Likelihood/Probability:**  
Select

**Severity:**  
Select

**Rating:**

**Basis for Decision:**

**Is this Hazard fully controlled by a Prerequisite program?**  
Yes

**If Yes, Identify the program**

**Is this Hazard eliminated by a subsequent process step?**  
Yes

**If Yes, Identify the process step**

**Can a viable product be produced if the process step fails?**  
Yes

**If No, that step must be considered a critical control point. Enter CCP number below. If Yes, This can be considered a Control Program.**  
[\(Click Here for a CCP Decision Tree\)](#)

**CCP#**  
**If this Process Step has a CCP#, complete the following fields in blue**

You should have one record for each different risk evaluated in each process. Once complete you will have two different reports that will outline and summarize your Risk or HACCP program.

### Identifying Critical Limits, Monitoring and Corrective Actions

HACCP Plan Number: 5  
Product/Product Group: SKUG01: Course Penicillium

Product Part Description:

Process/Step/CCP#	Critical Limit	Monitoring Procedures	Corrective Action*
Laboratory 0 1	2 bar	What will be measured? Steam pressure Where will the critical limit be measured? at inlet of bottle cleaning machine How will the critical limit be measured? pressure sensor with alarm Who will monitor the critical limit? operator How often will it be monitored? continuous	How will the process be corrected? If the alarm sounds, the operator must re-clean all the bottles which are on the cleaning line. Product disposition? Not relevant as there is no product in the bottles yet. Who is responsible for implementing the CA? Production Manager Measures to prevent recurrence?

Approved By: Bill Horvick

Date Approved: May, 06, 2019

**Note:** This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was printed

### Recordkeeping and Verification Procedures

HACCP Plan Number: 5  
Product/Product Group: SKUG01: Course Penicillium

Product Part Description:

Process/Step/CCP#	Records	Responsibility	CCP Verification
Laboratory 0 1	Cleaning log book - indicate per shift whether the alarm has sounded yes or no and at what time(s)	Operator	Literature study shows that applying 2 bar of 100 degrees Celsius steam for 5 seconds kills all pathogens and spores. The line speed is fixed and gives a 30 second exposure time to the steam.

Approved By: Bill Horvick

Date Approved: May, 06, 2019

**Note:** This report was printed from the CIS Continuous Improvement Software. Please be aware that the most current information is on-line in the system and revisions to this record may be made after this record was printed

Questions? [peter@cissoftware.com](mailto:peter@cissoftware.com)