RAISING THE BAR TO NEW HEIGHTS!

Welcome to CIS

Continuous Improvement Software – Getting Started

Part One

Introduction

Welcome

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 offered at an affordable cost that will serve you for years.

CIS is a totally web-based integrated solution to automate all of your quality and management requirements and to ensure that proper follow-up is consistently achieved in order to guarantee results.

Getting Started

- Before you can jump in and start using CIS Software there are a few important steps that must be taken to ensure proper functionality and to marry the terminology between CIS and your organization.

- We understand the temptation to start using CIS Immediately but taking time to plan out the implementation will be invaluable for the growth of CIS and the benefits your organization will enjoy.

Importing

- Before anyone can use the system certain information must be populated such as your customers, suppliers, users, criterions and more.

- Some information may be imported using .csv spreadsheets while other information must be set-up manually.

- If you are uncertain about any set-up features, please contact your consultant for assistance since the proper set-up is the key to a successful implementation.

Importing

Importing Spread Sheets:

After watching the video, you can click here to download the applicable spreadsheets:

1) For Customers, Employees that will be using CIS and Suppliers that you want in your system but not on the Approved Vendors List, use this .csv

2) For Suppliers that you wish to have imported into CIS and also into the Approved Vendor's Database Table use this .csv

3) For all employees to be imported into the HR Table for Training including the ones imported into CIS using the above .csv (1) use this .csv

Importing

Other information may be imported by our programmers by importing the data directly into the tables, but these types of imports require some time and are performed at an additional cost.

Some instances of these types would be your part numbers, sku numbers, product information for inventory, previous calibration and maintenance list of equipment and even previous calibrations, special requirement's data or other data that yopu may have that could take much time to manually enter into CIS.

Talk to your consultant, make a plan and we are here to help ☺

Criteria Set-Up

Setting up your criteria before you start working with CIS is a very important step. Each module (data base table) has data to be entered into the records that is selectable and standardized. For example, in the Non Conformity module, 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 important to take the time to establish these criteria's 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 at a later date.

Criteria Set-Up

To set-up Your Criteria, click on Administration, then select Criteria followed by selecting the applicable criteria you wish to enter. The following are some Guidelines:

- Customer Feedback - (Customer Feedbacks) (late delivery, damaged etc.…). We also suggest that you include a criteria for Positive Feedback to balance the reporting.

- Non Conformity Criteria - (picking error, software, other etc…).

- NCR Classification - (note, in the food industry, they require each NCR to be classified as serious, major or unsatisfactory). If you do not have food, 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.
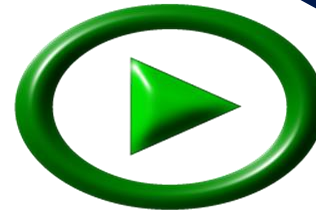
Click to play video

Criteria

- Facility Locations - building one, two three or when there is only one building, you may also use this to enter the departments if you have just one location.

- Product Codes – you may enter products by groups, such as rubber products, paper products or you may actually enter the SKUs.

- 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 for another type of data recording and you may change the name completely. Discuss this with your consultant.

- Near Miss Classification - this would be how you may classify your near miss incidents.

- Work Criteria - (The work order categories such as maintenance, re-work, sanitation, etc…).

Criteria

- 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...

Criteria

Client Type Criteria - is to set the type of clients you may be tracking in the Sales and Marketing Module. 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…

FAQ Topic Type Criteria - is to set the topics that are selectable in the CIS Communication system and may include topics such as, customer request for quote, procedure revision request etc.… We have included a default selection of topics that we feel may be useful.

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.

Criteria

- 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 – This criteria includes: Incident type, employee status, physical injury, body part, worker injury, forklift incident, unsafe/hazardous conditions, unsafe acts, supervisor activities, employee attributes, and OSHA Injury. This criteria is used in the Accident/Incident module to record any accident or incident that happens in your facility. These have default options that we feel will be helpful, especially when it comes to reporting to OSHA.

Criteria

- Potential Hazard Criteria (Food Safety) – This criteria is defaulted with Biological, Physical, Chemical and Radiological to describe the type of potential hazard for Food Safety.

- Potential Risk Criteria (Manufacture) – This criteria is defaulted with Biological, Physical, and Chemical to describe potential risk associate with a process or procedure.

- Severity – This is defaulted as Low, Medium, and High to classify the level of the hazard/risk associate with a process/procedure.

- Potential Fraud Criteria – This criteria has default options to classify possible fraud associated with Food Safety and/or Risk Analysis.

- Labor Rate Criteria - Used in Maintenance to set labor rates. You may enter multiple rates to select from such as technician rates, management rates etc.

HR and Training

- The next set-up would be your training program in the HR Section. This process will be on going and will change often. However, it is important to set-up the HR properly at the beginning.

- The CIS HR and Training Module is very powerful and ensures consistent and timely training across the organization.

Click to play video

Access to Help

Where to go from here?

Help Information

Click Here to Download the Help User Manual.

- *Please note that this is a PDF File on our server and it does not contain any viruses. You may receive a Microsoft Office Notice (warning) when you click to download depending on your system but rest assured you may click "OK" to open the file.*

Help Videos: In CIS Software on the right side Tab you may select and click help for any module in CIS Software
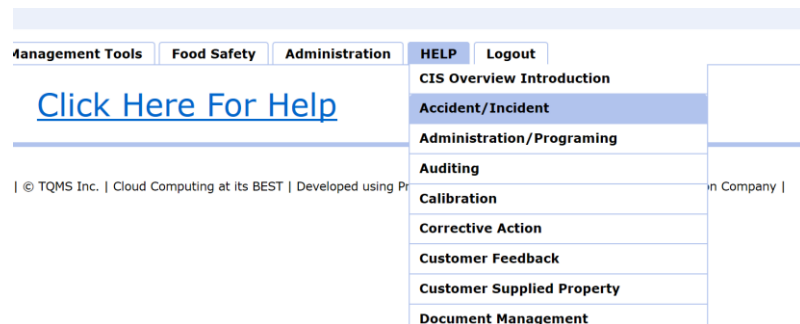
Help

- Direct link to the help sections are also located within each module on the right upper side. For example, if you are in Nonconformity and want to review Nonconformity help, click the help in the upper right corner…

Contact Help

Your first contact should be with your consultant who sold/set-up your CIS Software. If your consultant is not available or you need immediate help:

Peter.Sanderson@outlook.com

Cellular and/or Text: (613) 577-4417