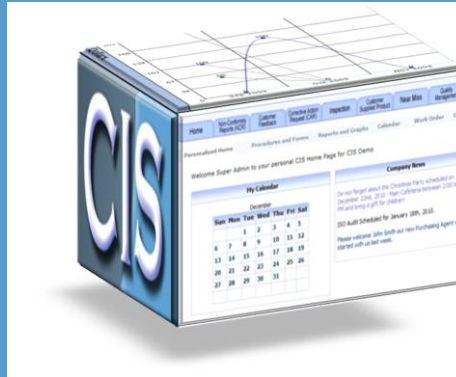


Using Continuous Improvement Tools Ensures the Road to Success!



CIS is outside the box...



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

Edition 2014-1 – January 1, 2014

Revision 2014 ➤ On the road towards Excellence!

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Since 1989; Serving our Customers Throughout United States and Canada



Continuous Improvement Software

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Overview

We would like to take this opportunity to thank you for choosing CIS 2014 – 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 2013 is now available for loading on a company server when required for extra unique security requirements.

Help and manuals in CIS 2014 is now on its own blog/forum that may be accessed at www.isurvivedobsolescence.com. However, our help videos and help manuals can only provide assistance with CIS 2014 as delivered to you at the beginning. Please note that as you modify CIS 2014 to meet your needs, our training videos may become less and less effective. For example, we may be demonstrating the Nonconformity Module and we would select the module under quality data menu when you may have moved the Nonconformity Module 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.

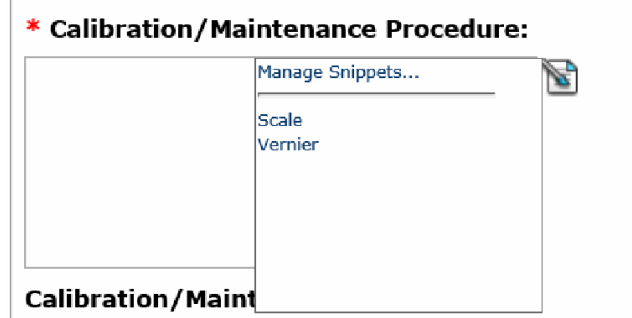
In the new CIS 2014, you may add your own help comments in all of the Input forms by fields and you also have your own FAQ page to further help your users.

Snippets

Snippets help employees to enter data into memo fields that are repetitive and may be entered frequently or to 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 particular 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.

A screenshot of a web application interface showing a form titled "Add Record". At the top left, there is a blue button with a plus sign and the word "New". To the right of the button is a "Sort By" dropdown menu. Below the button, the text "There are no records found" is displayed in red. On the right side of the form, there is a section titled "Add Record" with a red asterisk. Below this, there is a red asterisk followed by the text "Indicates required field". There are two required fields: "Snippet Name:" with a text input field containing "Scale 2", and "Snippet Content:" with a text area containing "Calibrate using Master Weights at 5, 50 and 100 Lbs. Must be +/- 0.2 Lbs. If adjustment is needed, record the". At the bottom of the form, there are two buttons: "Save" and "Cancel".

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:

00".

*** Calibration/Maintenance Procedure:**

Calibrate using Master Weights at 5, 10, 50 and 100 Lbs. Must be +/- 0.2 Lbs. Record any adjustments made.

Calibration/Maintenance By:

Calibrated In House

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.

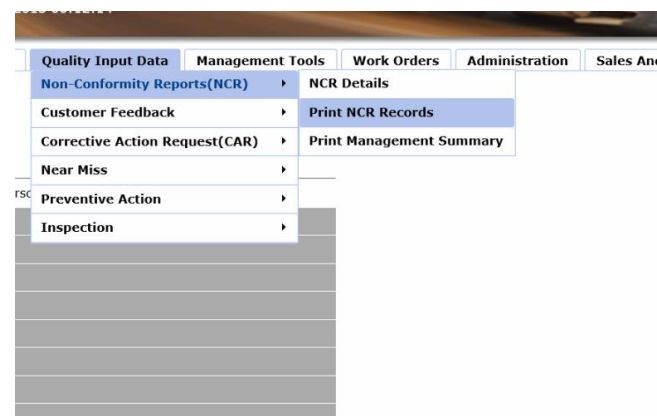
Another example of snippets is to have standard information available. For example, in the Work Order module, under material, a snippet could be created to have the price of materials:

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

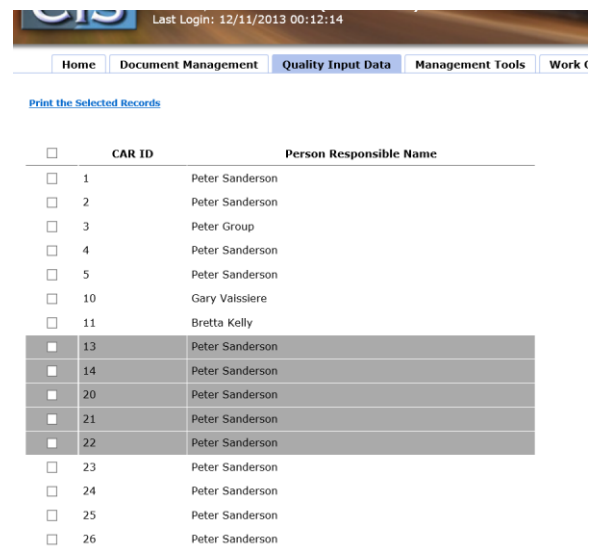
By having the prices as above, the employee may calculate and enter the total cost of material used in the material cost field.

Printing

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



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



System Set-Up (Only administrators have access to this module)

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 Vendor's Module. Likewise, a customer must be a user before they can be selected in a NCR Record or Inspection Record.

To add users, you must access the administration module 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.

Administration	Sales And Marketing
User Management	User Types
Criteria	Users
Preferences	Import Users
HR Settings	
Personalized Home	
Website	
BackUp	
Site Management	
Testing Page	

New

Sort By | Total Records: 20 |

Items Per Page: 25

<input type="checkbox"/>	Peter Sanderson User Name: petercis Password: ***** utkarsh@pruthatech.com User Type: Administrator
<input type="checkbox"/>	Peter Sanderson User Name: petercis Password: ***** utkarsh@pruthatech.com User Type: Manager
<input type="checkbox"/>	Peter Sanderson User Name: petercis Password: ***** utkarsh@pruthatech.com User Type: Customer
<input type="checkbox"/>	Peter Sanderson User Name: petercis Password: ***** utkarsh@pruthatech.com User Type: Supplier
<input type="checkbox"/>	Bretta Kelly User Name: brettacis Password: ***** bretta@cissoftware.com User Type: Administrator
<input type="checkbox"/>	Bretta Kelly User Name: brettacis Password: ***** bretta@cissoftware.com User Type: Manager
<input type="checkbox"/>	CIS Customer 2 User Name: brettacis Password: ***** bretta@cissoftware.com User Type: Customer
<input type="checkbox"/>	CIS Supplier 2 User Name: brettacis Password: ***** bretta@cissoftware.com User Type: Supplier
<input type="checkbox"/>	Grant Sharp User Name: grantcis Password: ***** tech@pruthatech.com User Type: Manager
<input type="checkbox"/>	CIS Customer 3 User Name: grantcis Password: ***** tech@pruthatech.com User Type: Customer
<input type="checkbox"/>	CIS Supplier 3 User Name: grantcis Password: ***** tech@pruthatech.com

Add User

* Indicates required field

User ID: New User

* Name:

* User Name:

* Password:

* Email Address:

User Type:

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

Documentation Access:

☐ Business Process Procedures
☐ Company News and Policies
☐ External Documents
☐ Flow Charts
☐ Form/Logs
☐ PruthaTech
☐ Reference Documents

Title:

Department:

Address:

Address2:

City:

State:

Each Manager, Supervisor and/or key employees should be entered. However, you may enter one department user for all employees in that department. For example, you may have the following users:

Warehouse 1 Employee
Warehouse 2 Employee
CSR 1 Location 1 Employee
Etc....

Customers and Suppliers must be entered. However, customers, suppliers and employees may be imported by your consultant or reseller. There is a specific type of spreadsheet required and this spreadsheet is may be downloaded by accessing the Administration Help section in CIS when you are in the Administration Module.

You may also import users from a spreadsheet. The spreadsheets **MUST BE FORMATED EXACTLY** as per the spreadsheet samples displayed when clicking help in the Import Users Screen. Often it is best to copy the data into the sample spreadsheet since Excel will maintain the formats (i.e. dates etc...).

However, 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 actually 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 module,
- Managers into the users table,
- Administrators into the users table,
- Employees into the users table,
- Employees Imported into the Training Module,
- Employees and their past training records into the training module.

Note: When CIS imports new managers, customers etc. into the user table, it does not establish the settings such as the modules 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.

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 user name 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 modules.

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). **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 the set-up other administrators with limited access to administration modules. 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 modules. Likewise, you could also have another administrator responsible for news and so on...

Panel Access:

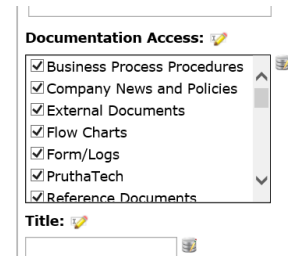
Charts	View >	Non-Conformity Reports - View,Add,Edit & Delete
CIS Personal Mail	View & Add >	Customer Feedback - View,Add,Edit & Delete
	View,Add & Edit >	Corrective Action Requests - View,Add,Edit & Delete
	View,Add,Edit & Delete >	Objectives - View,Add,Edit & Delete
	< Remove	Inspection - View,Add,Edit & Delete
		Meetings/Audits - View,Add,Edit & Delete
		Calibration - View,Add,Edit & Delete
		Vendor/Supplier Management - View,Add,Edit & Delete
		Admin - View,Add,Edit & Delete

Note: CIS 2014 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.

User Access for Documentation

In addition to deciding on which modules a user may access to, you may also decide on which documentation folder the user may see (have access to) when they login.

You will also notice that in the main Panel Access, there are two permissions for documentation that are described below:



Setting Users

In CIS 2014 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 2014 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.

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 module (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.



User:

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

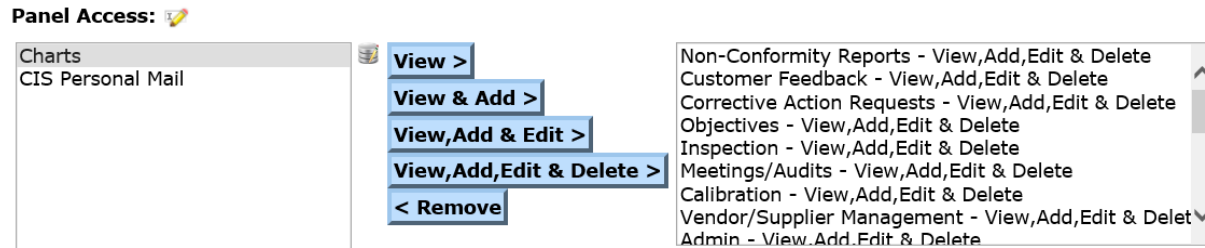
Customer:

Customers must be entered as users in order for the modules to function. You require at least one customer in order for many of the CIS modules 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 modules that you want them to see and also give them access 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: 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.

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 module 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 Module,
- View & Add – Allows Customer to View their records only and add new records in the Selected Module,
- View, Add & Edit – Allows Customer to View their records only, add new records and edit existing records in the Selected Module,
- Remove – Removes the customer’s access from the selected module(Must select the module 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 users section and add all the users. 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. Therefore, records will not be accepted and saved if the following occurs:

- Email address is not valid, or
- User name 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.

Page Global User Permissions

CIS 2014 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.

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)

The screenshot shows the 'Administration' tab in the top navigation bar. Below it, there's a 'New' button and a 'Sort By' dropdown. A table lists existing user types: Administrator (Landing page: /admin/home), Manager (Landing page: /admin/home), and User (Landing page: /admin/home). To the right, the 'Add Record' form is visible, with fields for 'Type name' and 'Landing page', both marked with an asterisk to indicate they are required. There are 'Save' and 'Cancel' buttons at the bottom of the form.

Revising or adding Global Permissions by Page per User

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.

From the expanded list of pages and menu modules, 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". When 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.

The screenshot shows the 'Edit Page Properties' dialog box. The 'Panel Name' is 'Employee Details' and the 'URL/Page Name' is 'admin/employee_details'. The 'Menu Icon' field is empty. Under 'Extra Properties', 'Is Active' is checked. The 'Select Menu Type' is set to 'Text'. The 'Login Required' section has 'Is Login Required' selected. The 'Permission To' section has checkboxes for 'All', 'HR_Manager', 'Supplier', 'Administrator', 'Manager', 'User', 'Customer', and 'Subcontractor'. The 'Resource Type' is 'Web Page'.

Once we have selected the user type access, we then must 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 WebUserController assigned to the specific page. In this example it is “WUC_Employee_Details”.

Once we have taken note of the WebUserController, we then go to Administration/Site Management/User Controls and select that specific WebUserController 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.

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 of the settings for each page and WebUserController. However, for future management, it is far better because if in the future you want 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.

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.

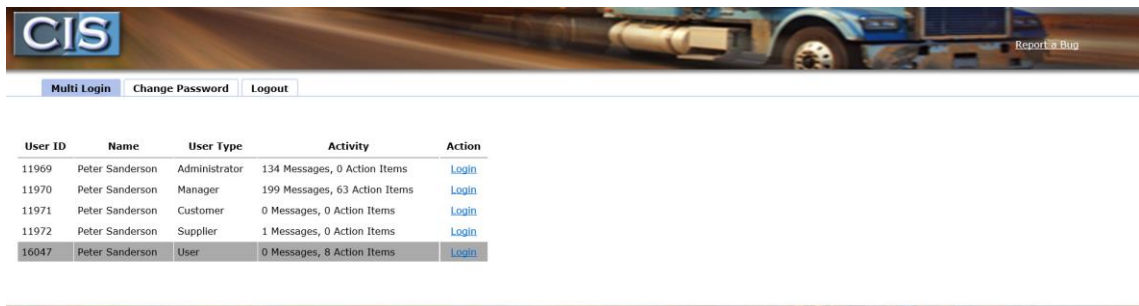
- ☒ Send CIS Notifications via email
- ☐ Send CIS Notifications via CIS Personal Mail with email reminder
- ☐ Send CIS Notifications via CIS Personal Mail

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 systems or to have access to one system with multiple roles such as administrator and manager. This feature is useful for many reasons:

1. Customers/Suppliers that deal with many organizations that use CIS may have one username and login to access these organizations,
2. The company administrator may have one username and password and be capable to login and out as the administrator or manager,
3. Corporate systems that have many CIS systems may have certain managers with one username or password to have access to all or some of their satellite systems.

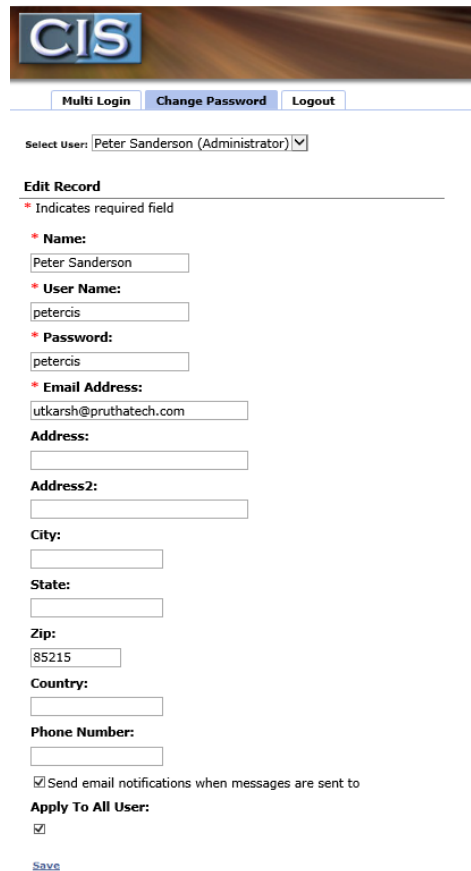
When logging in as a multi-user, the multi-user is presented with a screen that highlights all messages and quantity of open action items for each of the CIS systems:



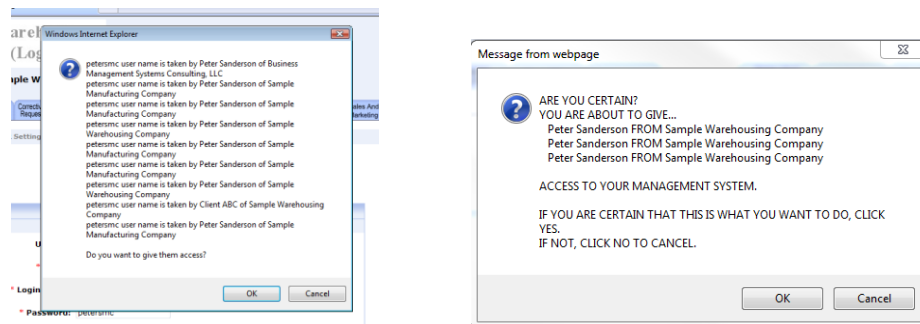
User ID	Name	User Type	Activity	Action
11969	Peter Sanderson	Administrator	134 Messages, 0 Action Items	Login
11970	Peter Sanderson	Manager	199 Messages, 63 Action Items	Login
11971	Peter Sanderson	Customer	0 Messages, 0 Action Items	Login
11972	Peter Sanderson	Supplier	1 Messages, 0 Action Items	Login
16047	Peter Sanderson	User	0 Messages, 8 Action Items	Login

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).



To give user multi-user login permission, you simply have to add the user a second time in a different CIS system or in the same system using a different role (manager, 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):



IMPORTANT: DUE TO SECURITY, EACH TIME WE ADD A MULTI-USER, CIS WILL AUTOMATICALLY CHANGE THE NEW MULTI-USER'S PASSWORD WITH A NEW GENERATED PASSWORD AND SEND THE

USER THE NEW PASSWORD BY E-MAIL. THIS 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.

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 Version 5.1 surpasses all expectations and ensures the continuous improvement and success of all our customers.

Login

User Name:

Password:

[Forgot Password?](#)

The following are some examples of how to initiate a multi-user login:

- If a customer desires one login because they deal with other suppliers using CIS, you must ask them for their current login (not their password) and e-mail address. You then add them as a customer using this login and e-mail address or if they are already entered into your CIS system, you edit their user record with the new login.
- If you are a company administrator and manager, simply edit one of the user records and enter the login name of the other.

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 module 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.

	Administration	Sales And Marketing	Logout
s	User Management		
	Criteria		
	Preferences		
A	HR Settings		
	Personalized Home		
	Website		
	Site Management		
		Company Info	
		Company Group	
		Email Templates	
		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 Module the administrator may invite the other companies to join the group. The administrator would need to know the companies 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:

Following are the list of Joined Companies in this Group.

CIS Demo
CIS Demo 2013
CIS Test

[Click to Share Criteria](#)


Invite Company

* Indicates required field

* **Company Name:**

* **Domain Name:**

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 Pruthi 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](#)
[Quality Input Data](#)

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	Add	Add
CCP Deviation	X	Add	Add
CCP Food Safety Violation (\$50.00)	X	Add	Add
Communication error (\$38.00)	X	Add	Add
Compilation Error	Add	X	X
Customer Service Paperwork Error (\$38.00)	X	Add	Add
Customers Carrier Error (\$76.00)	X	Add	Add
Equipment Failure	X	Add	Add
Equipment Failures	X	Add	Add
Gateway Paperwork Error	X	Add	Add
General Paperwork Error (\$38.00)	X	Add	Add
General Paperwork Error (\$388.00)	X	Add	Add
GL 700 Paperwork Error	X	Add	Add
GL 700 Picking Error	X	Add	Add
Hidden Deviation from Old Inhouse (\$38.00)	X	Add	Add

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](#)

User reports

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

The screenshot shows the 'Administration' tab in the system. Under 'User Management', the 'User Type' is set to 'Customer' and the 'Filter' is 'Only Active'. The 'Submit' button is highlighted. Below the filters, there are icons for 'New', 'Sort By', 'Total Records: 5', and an Excel icon. A list of users is displayed with checkboxes for selection. The users listed are:

- ☐ **Peter Sanderson**
User Name: petercis
Password: *****
utkarsh@pruthatech.com
User Type: Customer
- ☐ **CIS Customer 2**
User Name: brettacis
Password: *****
bretta@cissoftware.com
User Type: Customer
- ☐ **CIS Customer 3**
User Name: grantcis
Password: *****
tech@pruthatech.com
User Type: Customer
- ☐ **Neel**
User Name: neel
Password: neal

To the right, an Excel spreadsheet titled 'ExportedData.xls [Protected View] - Excel' is shown. It contains a table with the following data:

Domain_Name	Name	User_Name	Password	Email_Address	User_Type	Title
	Peter Sanderson	petercis	petercis	utkarsh@pruthatech.com	Customer	
	CIS Customer 2	brettacis	brettacis	bretta@cissoftware.com	Customer	
	CIS Customer 3	grantcis	grantcis	tech@pruthatech.com	Customer	
	Neel	neel	neel	hitesh@pruthatech.com	Customer	Company CEO
	Mehul	mehul	patel	hitesh@pruthatech.com	Customer	Company Director

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.

Criteria

Setting up your criteria before you start working with CIS is a very important step. Each module 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 best 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.

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.

The screenshot shows the navigation menu with the 'Administration' tab selected. Under 'User Management', the 'Criteria' option is highlighted with a red line. The menu structure is as follows:

- ers
 - Administration
 - User Management
 - Criteria
 - Preferences
 - HR Settings
 - Sales And Marketing
 - Logout

You now have the ability to establish **your own** criteria for:

- 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.
- Facility Locations - building one, two three or when there is only one building, you may enter the departments.
- 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 to record accidents and injuries that occur and classify these near misses by the seriousness (hospital, clinic, treated in house etc...).
- Near Miss Classification.
- 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 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...
- 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.
- 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.

You must establish accurate criteria for your type of business in order 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.

New | Sort By | Total Records: 30 | Add Record

Items Per Page: 25

Criteria:

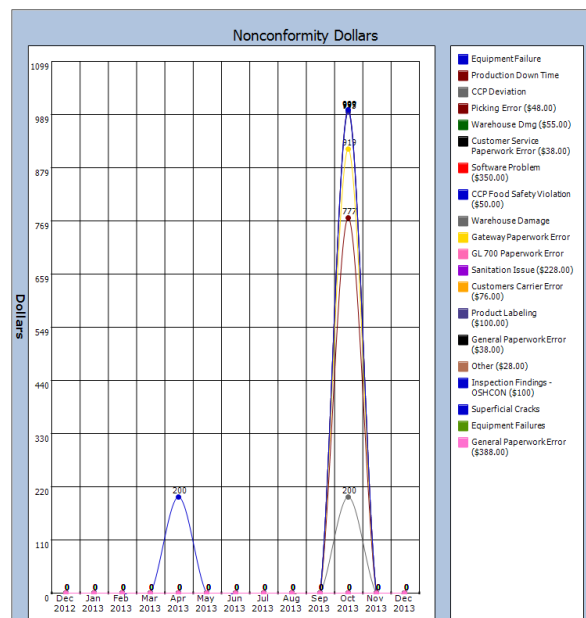
Color:

Is Active?: ☒ Yes ☐ No

Save Cancel

- ☐ **Scheduling Complaint**
(Is Active?: No) #ffa500
- ☐ **Packaging Complaint**
(Is Active?: Yes) #ffd700
- ☐ **Certificate Complaint**
(Is Active?: Yes) #32cd32
- ☐ **Poor Inventory Control**
(Is Active?: Yes) #0000cd
- ☐ **Poor Customer Service**
(Is Active?: Yes) #9370db
- ☐ **Invoicing Complaint**
(Is Active?: Yes) #ff69b4

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 criteria entered. Once a criteria is entered, you may select it and choose between active or archive. If you choose active, this criteria will be reported on the graphs. This feature is useful to control the amount 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 criteria on all the charts since it will be zero. In this case you may archive that criteria.

New | Edit | Archive | Sort By | Total Records: 30

Items Per Page: 25

- ☒ **Scheduling Complaint**
(Is Active?: Yes) #ffa500
- ☐ **Packaging Complaint**
(Is Active?: Yes) #ffd700

Inspection Criteria Details

CIS can be set-up to monitor the supplier/subcontractor's performance on a weekly or monthly basis. However, in order for this work properly, we must make some adjustments to how we use the inspection codes in the Inspection module. 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, then 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!

Company Information

In order for certain CIS Software to create reports such as Purchase Orders, the company information must be entered in preferences. The tax rate for purchase order calculations is entered here.

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.

Company Info

* Indicates required field

Domain Name

www.cisdemo.com

Created Date:

Sep. 05, 2013 06:48:49 AM

* Company Name:

CIS Demo

Address:

A/507 Primiaum House

Address2:

Nr Hk College Incomtax Roa

City:

Ahmedabad

State:

Gujarat

Zipcode:

382418

Country:

India

Phone:

(079) 254-8568

Fax:

Website URL:

Company Email:

Company Logo:

Browse...

The ideal size of logo is 375 X 75 (40 X 10) is also

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	petercds	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 is allowed 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.

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:

[Revert all to Master Template](#)

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






A A² S A²

B *I* U A 

H    

[[LOGO]]

Dear [[fk_users_manager]]

Please be advised that you have agreed to complete the following action item #[[pk_meeting_agenda]] on the specified due date:

[[VIEWLINK]]

Action item Description: [[actionitem_description]]

Due date: [[due_date]]

From the following Meeting:

Meeting/Audit Title: [[meeting_title]]

Meeting/Audit Date: [[meeting_date]]

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 solve include:

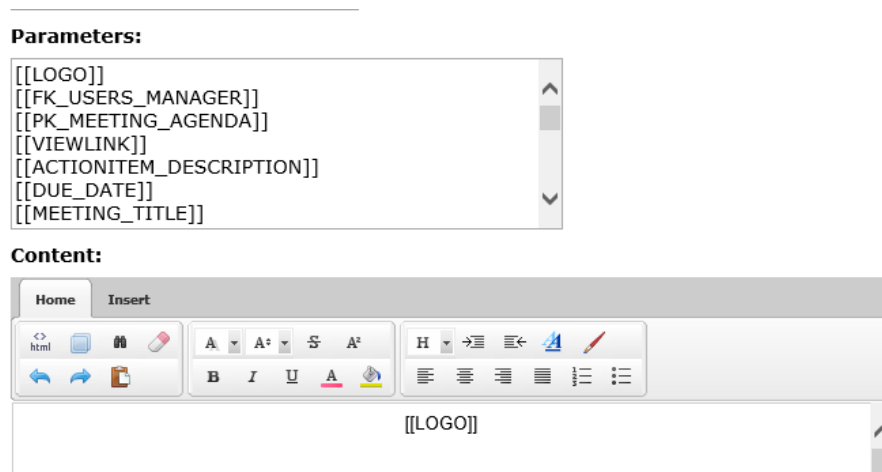
- There are many unique solutions to specific paperwork problems that can be solved by editing these reports. Therefore, when you see paper or reports that are currently used in your organization, stop, think and try to determine if CIS can eliminate these reports by editing the templates to suit your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

The customization of the reporting templates in CIS is often overlooked by most CIS users. 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. 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 cursor 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:

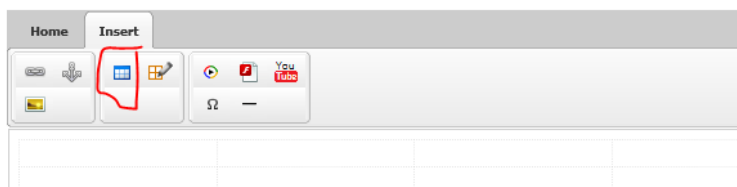
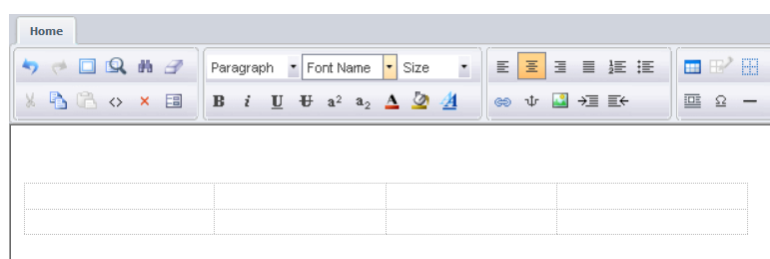
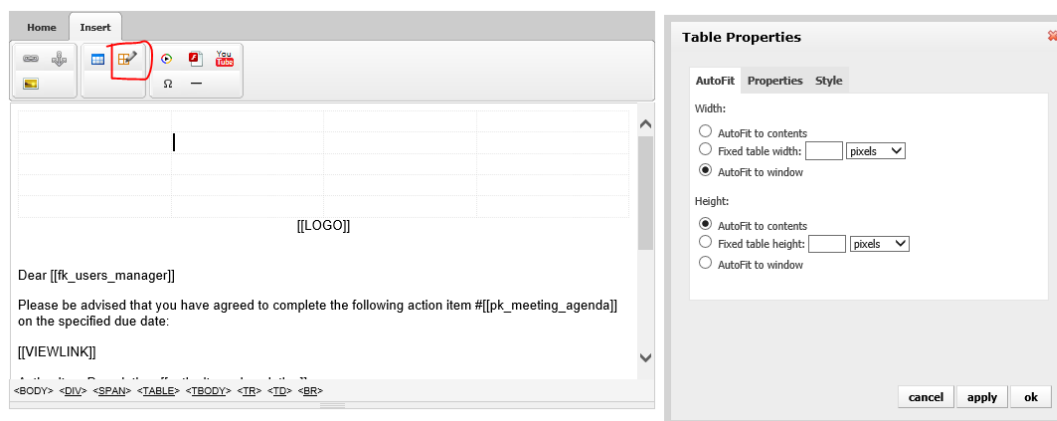


Table is inserted into the Form



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 have to take the next step to define the cells. So 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..

Content:



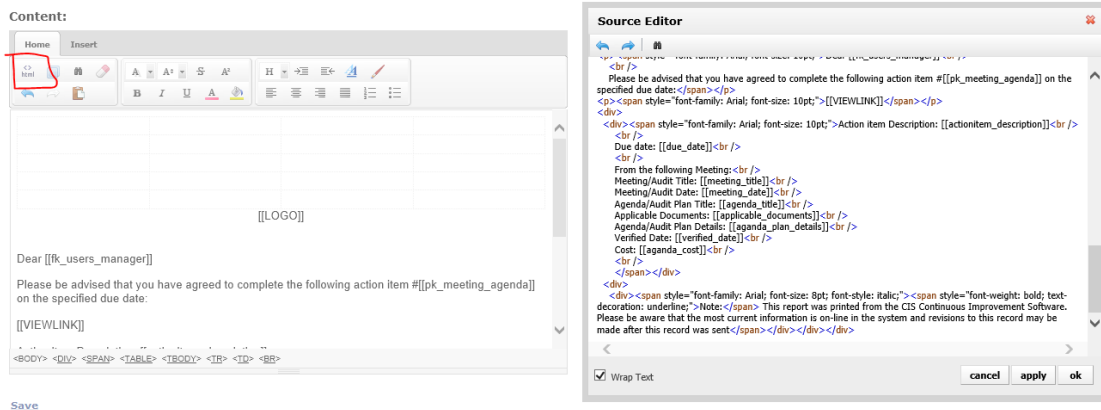
In summary there are a few additional commands that you may need to get your form to look “just right”. Since the template editor is an HTML on-line editor, certain functions that we are accustomed to use do not work. For example, right clicking, copy and paste do not work. You must use the copy and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

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

In the inspection module, 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 module.

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](#)

HR Settings



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). Under Standard Training Template, you may select the standard training and then enter the particulars for the standard training.


Standard Training Template 



* Indicates required field


Select Standard Training:  **Show Archived:** ☐ 



Select Training... 


Other Training:  






Hours:  






Trainer:  






Comments:  







*** Responsible Manager:**  

Select Manager... 

Cost of Training (\$):  



Advance Notice Time:  

14  in Days 

[Save](#)

Once you have selected the standard training, you may enter the following information that will be used in reporting, scheduling and calculations:

- Other or additional training that may be required,
- Hours, trainer and comments,
- Responsible manager to be advised by e-mail of the scheduled training,
- Cost of the training and the amount of days advanced notice that the managers should receive an email notification about the scheduled training.

This should be completed for each standard training criterion. If a criterion is missing, you must add it in the 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:** ☐ ☐

Add New Position

* **Position Name:**

Standard Training:

Coaching (Work with an e
 CSR (Confirming Master t
 CSR (Confirming signed t
 CTPAT Level 5
 Fire Extin. Training
 Fit Testina

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.

Modifying the 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]

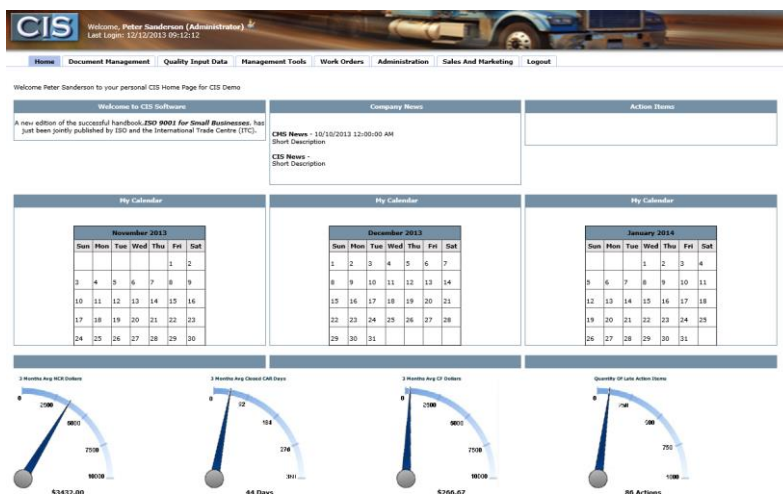
Welcome to CIS Software A new edition of the successful handbook, <i>ISO 9001 for Small Businesses</i> , has just been jointly published by ISO and the International Trade Centre (ITC).	Company News [COMPANY_NEWS]	Action Items [ACTION_ITEMS, 10, 30]
My Calendar [MONTH] [MINI_CALENDAR, WIDTH,-1]	My Calendar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

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: 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

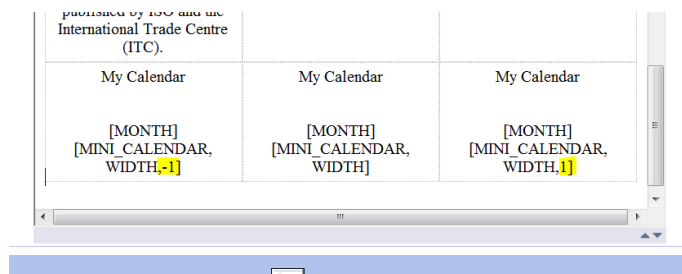
It is possible to show multiple months. For example, you could decide that the home page should contain last months, the current month and next month's calendar like in the picture below:



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)

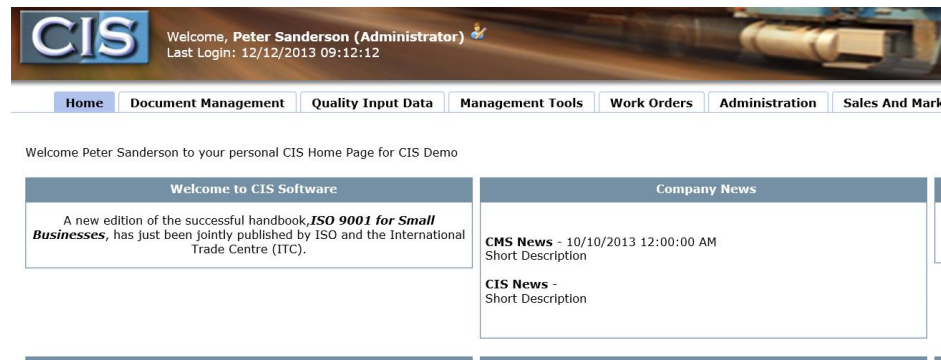
See code for above three-calendar set-up:



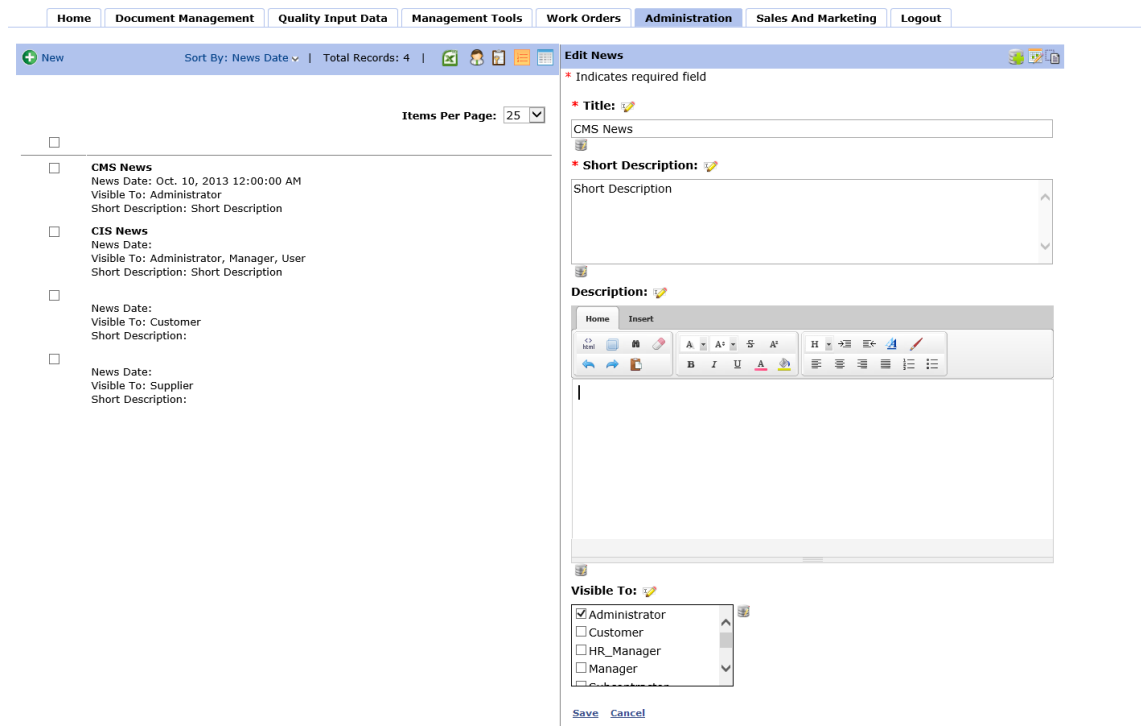
Posting News on the Home Page

News may be posted on the home page that is presented to company personnel when they login and also on the page that is presented to customers and the page presented to suppliers. 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. In this example, the administrator can see CMS News and CIS News. You may have various titles. Go to **Administration/Website/News**.



In the news section, there is a simple word processing program where you can enter all of the news that you wish to appear on the Home Page. This may be revised when required. The editor is an on-line HTML editor and right click operations will not work. You must use the icons for copy and paste and all other features. You may add new section titles or select an existing section and click edit to edit the news. You may also select which user types will see the news on their home page.



FAQ Page

You may add as many FAQs to your FAQ page in CIS. The FAQ page is found under the home page. To add FAQ go to Administration/Website/FAQ. You may add and edit your FAQs. The FAQs are a quick way to keep users informed of changes to your system, important answers to common questions and other useful things such as vacation policies.

The screenshot shows the CIS web application interface. At the top, a banner displays the CIS logo and a welcome message for Peter Sanderson (Administrator), with a last login time of 12/12/2013 09:12:12. Below the banner is a navigation menu with tabs: Home, Document Management, Quality Input Data, Management Tools, Work Orders, Administration, and Sales And Marketing. The Administration tab is selected, showing a dropdown menu with options: User Management, Criteria, Preferences, HR Settings, Personalized Home, Website (highlighted), BackUp, Site Management, and Testing Page. The Website dropdown also has a sub-menu with News and FAQ (highlighted). On the left, there is a search bar with 'Faq Category' set to 'All' and a 'Search In' dropdown set to 'All'. Below the search bar is a 'New' button and a 'Sort By' dropdown set to 'Category'. The main content area shows a list of FAQs with checkboxes for selection. The first FAQ is 'FAQ Category1' with the text 'What were your responsibilities?'. The second FAQ is 'FAQ Category3' with the text 'Job interviews are always stressful'. At the bottom, there is a footer with the text: 'CIS 2013- Continuous Improvement Software - 2013- Version 1 | © TQMS Inc. | Cloud Computing at its BEST | Dev'.

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 a 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 of 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.

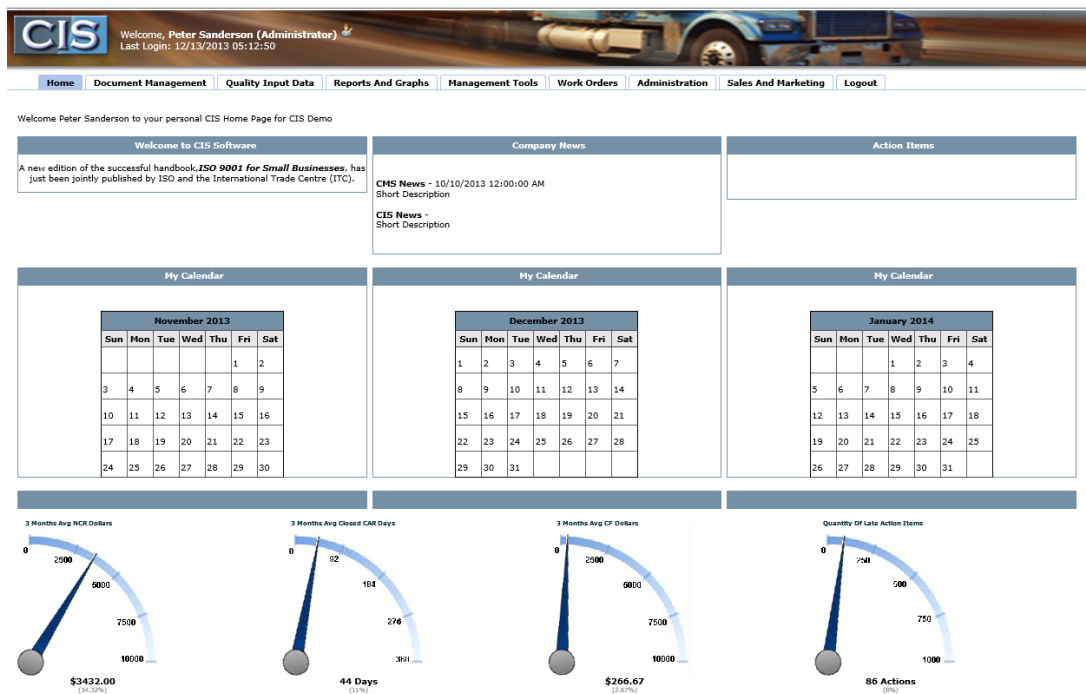
The screenshot shows the CIS Backup Setup page. At the top, a banner displays the CIS logo and a welcome message for Peter Sanderson (Administrator), with a last login time of 12/12/2013 09:12:12. Below the banner is a navigation menu with tabs: Home, Document Management, Quality Input Data, and Manager. The Manager tab is selected. The main content area is titled 'Backup Setup' and contains several fields for configuration. The 'FTP URL' field is required and contains the value 'cisdemo.continuousimprovementonline.com'. The 'FTP User Name' field is required and is empty. The 'FTP Password' field is required and is empty. The 'Email Addresses' field is required and is empty. The 'Passive Mode' checkbox is checked. The 'Backup Period' dropdown is set to 'Semi Weekly'. The 'Backup Type' dropdown is set to 'SQL Format' and 'Data Files'. The 'Backup Service' dropdown is set to 'Disabled'. At the bottom, there are 'Save' and 'Test Site' buttons.

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,
- An action list (to do list) that will highlight each activity that the user must complete or attend. The manager can hover the mouse over each item and a summary will appear or click on the item which will bring the managers to the actual record so that it may be updated or completed,
- 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.



CIS Communication System (Personal Mail)

CIS includes a complete internal mail system that may be used to communicate with customers, suppliers, and management personnel. You must set the users to receive CIS communications in the user's section. However, even if the user's preferences is to receive CIS notifications by e-mail, their CIS personnel mail will still send and receive mail that is sent to

them by a customer, supplier or manager. The communication preferences in the user section ONLY apply to CIS notifications.

Note: CIS Personal mail is not available to the Administrator. This is why an administrator must also be a manager if he or she is to be part of the overall management system.

Advantages of using the CIS Personnel Mail:

With the introduction of e-mail instant communication, we have all gone backwards in time and forgotten about how communications can affect our corporate image. Employees are replying to e-mails without thinking, without representing the company's interest and most of all, owners and managers have no idea until it is too late. Furthermore, all these corporate communications are on individual's computers and may be deleted or lost at any time.

Last but not least, we are facing an increasing problem with Spam and un-solicited e-mails. The response to this threat is more complicated e-mail filtering software at all levels, the servers, the e-mail software such as Outlook, and the IP providers. The result is that many important communications may never get to the intended person or company. For example, If I placed an order using the following words: "Go ahead and mount those 50 parts and get them to the dipping department as soon as possible", the e-mail filtering may consider the words "mount" or "dipping" as a possible spam and direct the communication to junk. Additionally, when e-mail is sent, it bounces off a variety of servers, if one of them is not set-up with the proper reverse DNS information, the e-mail will also be refused by the next server. Can we rely on this form of communication any longer? The answer is NO, and CIS 2014 will provide the solution!

CIS Version 4.1 includes a complete communication system. Managers may communicate with other managers, customers or suppliers. Customers or Suppliers can communicate with managers. Each manager, customer or supplier will have their own Communication Log including threaded replies to each communication ID. Each communication is numbered. Attachments may be included and viewed instantaneously with no formatting or filtering problems!

Additionally, there will be a corporate log that will include all communications that may be accessed by selected executive management who are given permission within the CIS system. For example, this will enable a Customer Service Manager to review all corporate communications. Knowing this, employees and managers will most likely improve their communication skills, "think before talking".

Sending mail

To send mail, the user must go to Home/CIS Personnel Mail and then select +new:

The screenshot displays the CIS Personnel Mail interface. At the top, there is a header bar with a 'New' button, a 'Sort By: Date' dropdown, and 'Total Records: 134'. Below this is a list of messages. The first message is selected, showing details: 'Date: Nov. 21, 2013 06:02:24 AM', 'From: Company Admin', 'TO: Peter Sanderson', 'CC: [empty]', 'Topic: Document Management', 'Reference: New CIS: Uploaded Document Status', 'Message ID - Unread - Priority', 'Read: No', 'Priority: High'. To the right of the message list is the 'Add Personal Mail' form. It includes a 'To:' field with a list of names: ALBRIGHT, JEANETTE C; ALLEN, JAMES; BALLARD, PALLANCE A.; BARBER, JOSHUA; BARNES, EDDIE; BARNES, RODNEY; BARRIOS, GERANGEL; BARRIOS, JOEL; BARTNICKI, JAMES WALTER. There is also a 'CC:' field with the same list of names. A 'Bcc Email:' field is at the bottom. A note indicates that an asterisk (*) denotes a required field.

Once “Add New” is selected, the following standard type of mail input screen is presented. Files may also be attached and a standard topic must be selected. The standard topics will make retrieval or review of history much easier since they may be sorted by topic. The reference field may be used to add a more specific topic or subject information.

1 2 3 4 5 ... >>

Items Per Page: 25

☐

☐
Date - >From - To
Message ID:1552
Date:Nov. 21, 2013 06:02:24 AM
From:Company Admin
TO:Peter Sanderson
CC:
Topic - Reference
Topic:Document Management
Reference:New CIS: Uploaded Document Status
Message ID - Unread - Priority
Read:No
Priority:High

☐

☐
Date - >From - To
Message ID:1551
Date:Nov. 21, 2013 06:02:14 AM
From:Company Admin
TO:Peter Sanderson
CC:
Topic - Reference
Topic:Document Management
Reference:New CIS: Approval Required For Uploaded Document
Message ID - Unread - Priority
Read:No
Priority:High

☐

☐
Date - >From - To
Message ID:1548
Date:Nov. 21, 2013 05:55:21 AM
From:Company Admin
TO:Peter Sanderson
CC:
Topic - Reference
Topic:Document Management
Reference:New CIS: Uploaded Document Status
Message ID - Unread - Priority
Read:No
Priority:High

☐

☐
Date - >From - To
Message ID:1544
Date:Nov. 20, 2013 09:04:54 AM
From:Company Admin
TO:Peter Sanderson
CC:
Topic - Reference
Topic:Document Management
Reference:New CIS: Uploaded Document Status
Message ID - Unread - Priority
Read:No
Priority:High

☐

☐
Date - >From - To
Message ID:1535
Date:Nov. 20, 2013 09:03:01 AM
From:Company Admin
TO:Peter Sanderson
CC:
Topic - Reference
Topic:Document Management
Reference:New CIS: Uploaded Document Status
Message ID - Unread - Priority
Read:No
Priority:High

☐

☐
Date - >From - To
Message ID:1532
Date:Nov. 20, 2013 08:58:01 AM
From:Company Admin
TO:Peter Sanderson
CC:
Topic - Reference
Topic:Document Management
Reference:New CIS: Uploaded Document Status
Message ID - Unread - Priority
Read:No
Priority:High

*** To:**

☐ ALBRIGHT, JEANETTE C
☐ ALLEN, JAMES
☐ BALLARD, PALLANCE A.

☐ BARBER, JOSHUA
☐ BARNES, EDDIE
☐ BARNES, RODNEY

☐ BARRIOS, GERANGEI
☐ BARRIOS, JOEL
☐ BARTNICKI, JAMES WALTER

CC:

☐ ALBRIGHT, JEANETTE C
☐ ALLEN, JAMES
☐ BALLARD, PALLANCE A.

☐ BARBER, JOSHUA
☐ BARNES, EDDIE
☐ BARNES, RODNEY

☐ BARRIOS, GERANGEI
☐ BARRIOS, JOEL
☐ BARTNICKI, JAMES WALTER

Bcc Email:

☐ ALBRIGHT, JEANETTE C
☐ ALLEN, JAMES
☐ BALLARD, PALLANCE A.

☐ BARBER, JOSHUA
☐ BARNES, EDDIE
☐ BARNES, RODNEY

☐ BARRIOS, GERANGEI
☐ BARRIOS, JOEL
☐ BARTNICKI, JAMES WALTER

Priority:
☒ High ☐ Normal ☐ Low

Topic:
Select Topic

*** Reference:**

*** Email Body:**

Home Insert

A A A A

H H H H

B I U

B B B B

Email Attachments:




Upload File	File Name	Action
<input type="text"/> Browse...		<input type="button"/> <input type="button"/>

Reviewing and Replying to Mail

The user may review the mail and attachments, archive old messages or delete messages. However, please note that when a message is deleted, it will still remain in the corporate e-mail log. Messages may be replied to except for notifications received from the CIS system such as a CAR or action reminder. You cannot reply to CIS.

Corporate mail Access

If you have access to corporate mail, you can review all mail from all users in your CIS system by clicking corporate mail. Please note that in the example below we have selected to view the table format and not the default view format.

Total Records: 1612   			
1 2 3 4 5 ... >>		Items Per Page: 25 	
<input type="checkbox"/>	Date - >From - To	Topic - Reference	Message ID - Unread - Priority
<input type="checkbox"/>	Date: Dec. 13, 2013 12:25:16 AM From: Company Admin To: Peter Sanderson CC:	Topic: Reference: New CIS: Minimum Inventory Require	Message ID: 1617 Thread Id: 0 Read: No Priority: High
<input type="checkbox"/>	Date: Dec. 13, 2013 12:25:16 AM From: Company Admin To: BOUCHARD, NATHAN R CC:	Topic: Reference: New CIS: Minimum Inventory Require	Message ID: 1618 Thread Id: 0 Read: No Priority: High
<input type="checkbox"/>	Date: Dec. 13, 2013 12:25:16 AM From: Company Admin To: Peter Sanderson CC:	Topic: Reference: New CIS: Minimum Inventory Require	Message ID: 1619 Thread Id: 0 Read: No Priority: High
<input type="checkbox"/>	Date: Dec. 13, 2013 12:25:16 AM From: Company Admin	Topic: Reference: New CIS: Minimum Inventory Require	Message ID: 1620 Thread Id: 0

Document Management (Document and Data Control)

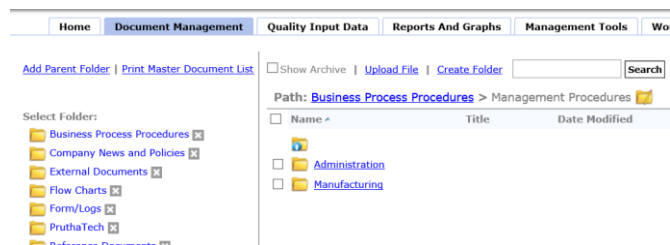
This section of CIS software is used to control all documents including management procedures, work instructions, forms/logs, training materials, inspection procedures, environmental procedures, risk assessments, company news/ policies, and outside sources (External Documents) and any other types of 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:

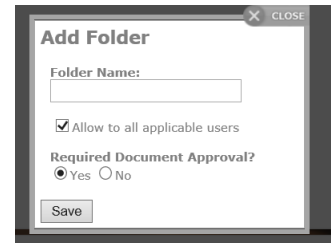
- Management Procedures
 - Administration
 - Manufacturing
- Policies



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:

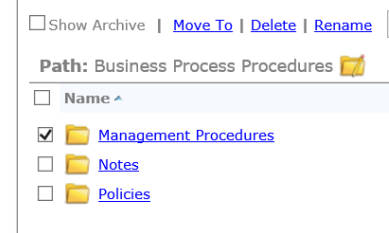
1. To allow all users access and the ability to see this folder or that no one can have access to the folder unless set in the user's setting in administration. For example, if you want to add a folder for Sales Executives to maintain sales quotations and would only like the executive sales team to have 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 files 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.

Path: [Business Process Procedures](#) > Notes

Name	Title	Date Modified	Size
FC_6.2.2_Training_and_Competency.docx (1)		Dec. 13, 2013 08:44:33 AM	53.99 KB
FC_7.1_Planning.docx (1)		Dec. 13, 2013 08:44:34 AM	46.6 KB
FC_7.2.1_Quote_Contract_Review.docx (1)		Dec. 13, 2013 08:44:34 AM	47.08 KB

Progress: 100%

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.

Path: [Business Process Procedures](#) > [Management Procedures](#) > Administration

Name	Title	Date Modified	Size
Business Systems Manual BSM - ISO.doc (1)		Dec. 13, 2013 08:54:46 AM	140 KB

Progress: 100%

Note: The uploaded document requires approval from manager so the new version that you have uploaded will be available to download after approval. You will be notified via email after approving by selected manager

Important 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 draft. 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 have the ability to delete.

Home | **Document Management**

[Add Parent Folder](#) | [Print Master Document List](#)

Select Folder:

- [Business Process Procedures](#)
- [Company News and Policies](#)
- [External Documents](#)
- [Flow Charts](#)

Editing File Properties, Approving, Rejecting and Moving Files

Editing File Properties

Files that were uploaded and require approval MUST have the properties edited. 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.

The screenshot shows a web-based file management system. On the left, a 'Select Folder:' sidebar lists various folders like 'Business Process Procedures', 'Company News and Policies', etc. The main area displays a table of files. The file 'Business Systems Manual BSM - ISO.doc' is selected. Above the table, there are tabs for 'Need Approval', 'Approve', 'Reject', and 'Properties', with 'Properties' being the active tab. On the right, a form displays the document's metadata, including Title, Description, Number, Revision, Retention Years, Filing Location, Customer's Revision, Document Location, Approved/Uploaded By, and Approved By. At the bottom of this form are 'Edit' and 'Close' buttons.

Once you select the 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 CAN APPROVE THE DOCUMENT.**

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.

This is a detailed view of the document editing form. It includes fields for: Document Type (a dropdown menu), Title, Description (a text area), Number, Revision (with a value of '1' entered), Retention Years, Filing Location, Customer's Revision, Document Location, Approved/Uploaded By (showing 'Peter Sanderson'), Approved By (a dropdown menu), and an Archive checkbox. At the bottom are 'Save' and 'Cancel' buttons.

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*

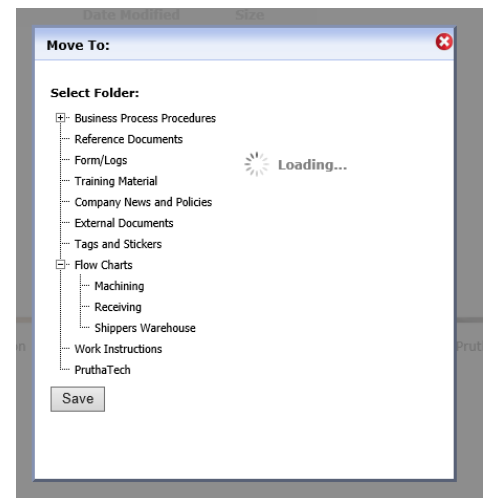
Moving or deleting Files

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 2014 is a dynamic loading site and 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.

CIS 2014 does work differently in this manner than the previous versions of CIS. To revise a document/file simply 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 mad 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
Edit View	FC-7.4.2	Peter Sanderson	12/13/2013	12/13/2013	Revised as a demonstration. This is where you place revision info.	1
Edit View	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:

Master Documentation Report

Current Documentation:

Section: Business Process Procedures

Doc Type	Doc Path	File Name	Title	Doc Number	Date Approved	Rev	Uploaded By	Approved by	Retention	Location	Archive
	Business Process Procedures > Notes	FC_6.2.2_Training_and_Competency.docx			12/13/2013	1	Peter Sanderson		N/A		No
	Business Process Procedures > Notes	FC_7.1_Planning.docx			12/13/2013	1	Peter Sanderson		N/A		No
	Business Process Procedures > Notes	FC_7.2.1_Quote Contract Review.docx			12/13/2013	1	Peter Sanderson		N/A		No
	Business Process Procedures > Notes	SP_8.0_Audits and Continual Improvement.docx			12/13/2013	1	Peter Sanderson		N/A		No
	Business Process Procedures > Notes	SP_8.3_Control of nonconforming product.docx			12/13/2013	1	Peter Sanderson		N/A		No
	Business Process Procedures > Notes	SP_4.2_Control of documents and Records.docx			12/13/2013	1	Peter Sanderson		N/A		No
	Business Process Procedures > Management Procedures > Administration	Business Systems Manual BSM - ISO.doc			12/13/2013	1	Peter Sanderson	Peter Sanderson	N/A		No
WI	Business Process Procedures	Business Systems Manual BSM - ISO.pdf	Business System Manual	BSM 001	11/27/2013	2	Peter Sanderson	Peter Sanderson	N/A		No
QSP	Business Process Procedures	Qsp4.3.1 Hazard Identification and Risk Evaluation.pdf	Hazard Identification and Risk Evaluation	QSP-4.3.1	11/24/2008	1	Peter Sanderson	Peter Sanderson	0		No
QSP	Business Process Procedures	Qsp5.6 Management Meetings & Objectives and Targets.pdf	Management Meetings & .	QSP-5.6	11/24/2008	1	Peter Sanderson	Peter Sanderson	0		No

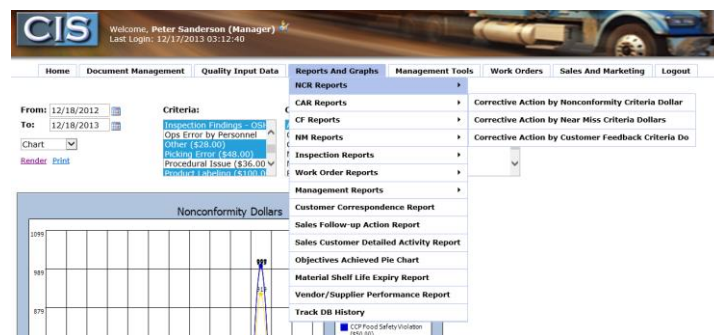
Statistical Reports and Graphs

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 also 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 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.

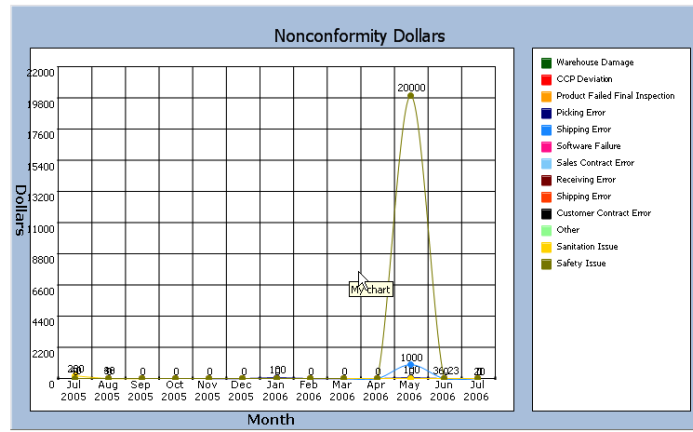
Note: to select multiple criteria, hold down the Ctrl key and click the selections with your mouse.

From: 12/18/2012	Criteria:	Customer:	Issue Type:
To: 12/18/2013	Inspection Findings - OSI	All	Commercial
Chart	Ops Error by Personnel	CIS Customer 2	Environmental
Render Print	Other (\$28.00)	CIS Customer 3	Performance
	Picking Error (\$48.00)	Mehul	Quality
	Procedural Issue (\$36.00)	Neel	Quantity
	Product Labeling (\$100.00)	Peter Sanderson	

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 modules such as Non Conformity and Customer Feedback have additional detailed reports located at the top in their module. 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

System 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.

This version1 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 actually 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 entries.

User Calendar (1)	User Calendar (1)	User Calendar (1)
12 Training (4)	13	14
19	Training Due Date (4) <ul style="list-style-type: none"> Grant Sharp-Orientation Grant Sharp-On the job Grant Sharp-Lift Truck Certificatio... Grant Sharp-HACCP Introduction 	
26		

11 User Calendar (1)	12 Training (4)
18 Meetings (1)	User Calendar (1) <ul style="list-style-type: none"> bretta Kelly - In Michigan

Work Orders

The work order feature is an important tool and it is linked to many other modules 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 sanitation and cleaning instructions and record the material and man-hours,
4. 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 displays the 'Work Orders' module interface. The top navigation bar includes 'Home', 'Document Management', 'Quality Input Data', 'Reports And Graphs', 'Management Tools', 'Work Orders', 'Administration', and 'Sales And M'. The main area is divided into a left sidebar and a right panel. The sidebar shows a list of work orders with details like ID, Requested by, Issued To, Customer/Supplier, Work Category, and Completed By. The right panel, titled 'Add Work Order', contains fields for Work Order ID, Load from Template, Requested by, Issued To, Customer/Supplier, Work Category, Instrument, Date Issued, Requested Completion Date, and Actual Planned Completion Date. A 'Submit' button is visible at the bottom of the sidebar.

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:

The screenshot shows a 'Work Order Notification' dialog box. The dialog box has a title bar 'Work Order Notification' and a close button. The main text asks 'Would you like to fill out a work order?'. At the bottom, there are two buttons: 'Yes' and 'No'.

To issue a work order, complete the information required including the instructions of the work to be performed. 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”.

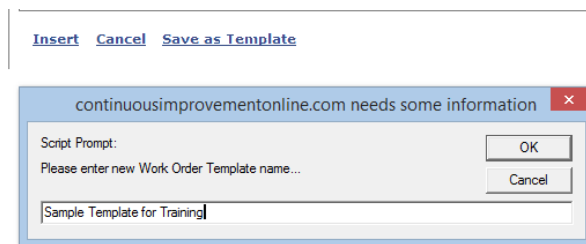
Once you have completed the following fields, you may decide to save the work order or to have the work order become a template so that you may select it in the future.

1. Requested by
2. Issued To
3. Customer
4. Work Category
5. Instrument (machine) – Used to link to the maintenance/Repair Module and to Track overall equipment maintenance/repair Cost. See Calibration/Maintenance/Repair.
6. Date Issued
7. Requested Completion Date,
8. Describe work to be performed,
9. 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.

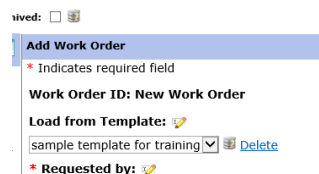
Note: When you save as a template, you actually create a template to be used and NOT A WORK ORDER. Once you save as a template, you can then select the template when creating a new work order. In summary, you cannot create (issue) a work order and template at the same time.

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 of your information will be inserted into a new work order and you simply have to select the requested completion date:





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.


Actual Completed Date: 


Completed By: 


*** Man-hours used:** 
0.00


*** Labor Cost:** 
0.00


Material Used: 

*** Material Cost:** 
0.00

Reference: 

Comments: 

Archive Flag: 

Caption: **File Name:** 

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

User Preferences

User E-mail Options

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

Home **Document Management**

Record has been saved successfully.

Send me Meeting/Audit Email in:

☒ Outlook Calendar format

☐ Normal Text/HTML format

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".

Add Multiday Events						
Save Calendar Changes						
December - 2013						
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 	30 	31 				

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 in order for the session to save, the SAVE button on the left top of the calendar must be clicked.

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.



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 Module. 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:

- 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,
- 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 is 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 the product code if applicable,
- Enter any costs associated with the Non Conformity,
- 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.

- 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 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 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 up 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.

Caption:	File Name:	Browse...	+	-
----------	------------	-----------	---	---

☐ Faure Client 2

Search In:

Sort By: Date | Total Records: 20 |

Items Per Page: 25

☐

☐ **NCR Information**
 ID: 85
 Issue Type: Quality
 Reported By: Peter Sanderson
 Customer: CIS Customer 2
 Criteria: Procedural Issue (\$36.00)
 Classification: Type 1
NCR Resolution
 Resolution By:
 Resolution Date:
Product Info
 Product Code: Chemicals
 Location: Default
 Resolution Cost: 0.00

Add NCR
 * Indicates required field
 NCR ID: New NCR
 * Issue Type:
 Quality
 * Date:
 12/13/2013
 * Reported By:
 Select Recommended By
 * Customer:
 Select Customer
 Reference:

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.

Search In:

Sort By: Date | Total Records: 20 |

CAR ID: 0 Work Order ID: 0 Inspection ID: 68 - Peter Sanderson

Items Per Page: 25

☐

☒ **NCR Information**
 ID: 85
 Issue Type: Quality
 Reported By: Peter Sanderson
 Customer: CIS Customer 2
 Criteria: Procedural Issue (\$36.00)
 Classification: Type 1
NCR Resolution
 Resolution By:
 Resolution Date:
Product Info
 Product Code: Chemicals
 Location: Default
 Resolution Cost: 0.00

☐ **NCR Information**
 ID: 81
 Issue Type: Performance
 Reported By: Grant Sharp
 Customer: Mehul
 Criteria: Transportation (\$76.00)
 Classification: NON-FOOD SAFETY ISSUE
NCR Resolution

Add NCR
 * Indicates required field
 NCR ID: New NCR
 * Issue Type:
 Quality
 * Date:
 12/13/2013
 * Reported By:
 Select Recommended By
 * Customer:
 Select Customer
 Reference:

Part/Asset/Service Code:

Quality Plan/Revision:

Non Conformity Report Description

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.

The screenshot shows the 'Quality Input Data' tab in a web application. It includes several dropdown menus for 'Issue Type', 'Reported By', 'Criteria', and 'Classification'. A 'Show Archived' checkbox is highlighted in yellow. A 'Companies' list box contains five entries: 'CIS Customer 2', 'CIS Customer 3', 'Daniel Defence', 'Faure Client 1', and 'Faure Client 2'. Below these is a 'Search In' dropdown set to 'All' and a 'Submit' button. At the bottom, a status bar shows '+ New | Delete | Active | Archive', 'Sort By: Date', and 'Total Records: 20'.


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 module to provide a complete customer performance picture.

The screenshot shows the 'NCR Details' page with a dropdown menu open for 'Non-Conformity Reports(NCR)'. The menu options are 'NCR Details', 'Print NCR Records', 'Print Management Summary', 'Near Miss', 'Preventive Action', and 'Inspection'. Below the menu is a table of NCR records.

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).




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: RFR <input type="checkbox"/> UAI <input type="checkbox"/>		FRB: RWK <input type="checkbox"/> SCR <input type="checkbox"/> KTV <input type="checkbox"/> INT <input type="checkbox"/>	
ACTIVITIES SUMMARY							
MATERIAL USE				TRACKING NUMBER		APPLICABLE SPECS	
<small>(Not information required for bench stock (Ex. fasteners, bolts, nuts, corner pin, etc.)</small>						<small>Others</small>	
REPORTED BY		MRB 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		

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 Feed Back

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

- Select the Issue Type (quality, environmental, safety etc.),
- Enter the customer name,
- 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 is close, please advise your administrator to add this new criteria to the criteria selection list for Customer Feedback,
- Select the location,
- 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.
- 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 the record then edit the record and upload more pictures,
- 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 up 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.

Customer Feedback Input Form Sample (Top Only)

Search In: All

+ New
Sort By: Customer Feedback Date
Total Records: 8

Items Per Page: 25

☐
Customer Feedback Information
ID: 13
Issue Type: Quality
Customer: Mehul
Feedback Criteria: Poor Condition on Arrival
Select Owner: Brett Kelly
Product Info
Reference: Reference
Location: IT Department
Product Code: Chemicals
Resolution Cost: 100.00

☐
Customer Feedback Information
ID: 14
Issue Type: Quality
Customer: Mehul
Feedback Criteria: Poor Condition on Arrival
Select Owner: Peter Group
Product Info
Reference: No Reference
Location: IT Department
Product Code: Cel Phone 88987-0987
Resolution Cost: 500.00

Add Customer Feedback
* Indicates required field
CF ID: New CF
* **Issue Type:**
Quality

* **Customer:**
Select Customer

* **Select Owner:**
Select Owner Name

* **Employee Received Feedback:**

* **How Feedback Received:**

* **Customer Contact:**

* **Customer Feedback Date:**
12/16/2013

Reference:

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.

New | Edit | Delete | Archive | View Uploaded files | CAR ID: 0 Work Order ID: 0 | Total Records: 10 | Sort By: Customer Feedback Date

Items Per Page: 25

☐ **Customer Feedback Information**
ID: 18
Issue Type: Quality
Customer: Peter Sanderson
Feedback Criteria: HACCP/Food Safety
Select Owner: Peter Sanderson
Product Info
Reference: 6556
Location: Plant 1
Product Code: Canned Peas
Resolution Cost: 0.00

☐ **Customer Feedback Information**
ID: 19
Issue Type: Quality
Customer: Peter Sanderson
Feedback Criteria: Packaging Complaint
Select Owner: Peter Sanderson
Product Info
Reference: test
Location: Plant 3
Product Code:
Resolution Cost: 0.00

☐ **Customer Feedback Information**
ID: 13
Issue Type: Quality

Edit Customer Feedback
* Indicates required field

CF ID: 18

* Issue Type: Quality

Quality

* Customer: Peter Sanderson

Peter Sanderson

* Select Owner: Peter Sanderson

Peter Sanderson

* Employee Received Feedback: Peter

* How Feedback Received: E-Mail

* Customer Contact: John

* Customer Feedback Date: 12/16/2013

Reference: 6556

Customer Feedback Description:

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.

New | Delete | Active | Archive | Sort By: Customer Feedback Date | Total Records: 10

Items Per Page: 25

☐ **Customer Feedback Information**
ID: 18
Issue Type: Quality
Customer: Peter Sanderson
Feedback Criteria: HACCP/Food Safety
Select Owner: Peter Sanderson
Product Info
Reference: 6556
Location: Plant 1
Product Code: Canned Peas
Resolution Cost: 0.00

☒ **Customer Feedback Information**
ID: 19
Issue Type: Quality
Customer: Peter Sanderson
Feedback Criteria: Packaging Complaint
Select Owner: Peter Sanderson
Product Info
Reference: test
Location: Plant 3
Product Code:
Resolution Cost: 0.00

☒ **Customer Feedback Information**
ID: 13
Issue Type: Quality
Customer: Mehul
Feedback Criteria: Poor Condition on Arrival
Select Owner: Brett Kelly
Product Info
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 web application interface. At the top, there is a header with the CIS logo and a welcome message for Peter Sanderson (Administrator), with a last login time of 12/16/2013 07:12:52. Below the header is a navigation bar with tabs: Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools, and Work. The Quality Input Data tab is selected, and a dropdown 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 highlighted, and a sub-menu is open, showing options: CF Details, Print CF Records, and Print Management Summary. The Print Management Summary option is highlighted. Below the navigation bar, there is a form with fields for Issue Type (Select Issue), Owner (Select), Show Archived (checkbox), and Company (checkbox). There is also a search bar with a dropdown menu set to All and a Submit button. At the bottom, there is a status bar with buttons for New, Delete, Active, Archive, Sort By: Customer Feedback Date, Total Records: 10, and an Edit button.

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 a 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 a NCR, CF or NM, click on the Corrective Action Panel then click on add CAR. You may enter the following information:

- Enter the date or select by clicking on the calendar icon. The default date is the current date,
- The due date will appear
- Enter the location or department,
- 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 of these 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 a NCR, CF or NM, you must enter the Corrective Action Request Description,

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:

- 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.

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 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)
- 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.

Resolved Date:	<input type="text"/>
Resolution Prepared By:	<input type="text"/>
Resolution Cost:	<input type="text" value="\$0.00"/>
Resolution Verified Date:	<input type="text"/>
Implementation/Resolution Verified By:	<input type="text"/>
Describe Verification Performed:	<div><div></div></div>
Date for Follow-up Review of Effectiveness:	<input type="text"/>
Manager Responsible for Follow-Up:	<div>Select Manager...<div></div></div>
Corrective Action Closed Flag:	<input type="checkbox"/>
Date Follow-up Performed:	<input type="text"/>
Results of Follow-up Review of Effectiveness:	<div><div></div></div>
Select Managers to send Email:	<div><div><div><input type="checkbox"/> Brett Kelly<input type="checkbox"/> Grant Sharp<input type="checkbox"/> Mark Wallen</div><div><input type="checkbox"/> Peter Group<input type="checkbox"/> Peter Sanderson</div></div></div>
Archive Flag:	<input type="checkbox"/>

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]

Preventive Action

The Preventive Action module addresses the concerns of the new ISO 9001 whereby organizations must focus more on Preventive Action to avoid errors as opposed to just reporting NCRs and issuing Corrective Actions. Preventive action is a true preventative tool to identify areas for improvement and initiate actions to avoid failure. Additionally, all actions assigned at the various steps will be included on the Master Calendar and on each manager's action list on their home page.

Entering a Preventive Action

Click Quality Input Data/Preventive Action/PA Details then select +New. Entering data in the Preventive Action module is done in stages and the Preventive Action record is designed to follow the status of the Preventive Action in stages as they are completed:

Stage One- Initiating a Preventive Action:

- Select the Issue Type (quality, environmental, safety etc.),
- Select the customer. If there is no customer directly related, select your own company,
- Enter the date,
- Describe the opportunity for improvement or the reason for the Preventive Action,
- List all processes that may be affected,
- Describe the potential risks or causes associated with the Preventive Action,
- If a risk analysis or why tree diagram is created, you may upload it,
- Describe your suggested Preventive Actions to address the potential risks.

Stage Two – Manager Review and Approval to Proceed:

- The manager responsible to review the Preventive Action suggestions should select his or her name,
- The responsible manager should enter the approved Preventive Action. If it is the same as the suggested, they may simply copy and paste it into the memo field,
- The responsible manager should enter the date he or she approved the Preventive Action,
- The responsible manager should then enter any documents that may require review and revision as a result of the Preventive Action and select the manager responsible and the due date,
- The responsible manager should then enter any follow-up actions that may be required and select a manager and due date for the follow-up actions.

Stage Three – Follow-up:

- The manager responsible for follow-up should enter the date the follow-up was completed and the results of the follow-up,
- At this stage, manager responsible for follow-up should decide and enter any additional actions required as a result of the follow-up and select a responsible manager and due date,
- If the process resulted in a Quality Objective, the manager should enter the quality objective Record ID,
- The cost should be entered for the complete project.

Stage Four – Closing:

- The manager responsible for approving the Preventive Action or the “team” should review all of the results and when they are satisfied that the Preventive Action and all subsequent actions are completed and satisfactory, they may close and archive the Preventive Action.

Preventive Action Input Screen (Sample top Only)

The screenshot displays a software interface for managing preventive actions. At the top, a blue header bar contains a 'New' button, a 'Sort By' dropdown, and a 'Total Records: 2' indicator. Below the header, a table lists preventive actions. The first entry, ID: 1, is expanded to show details: Issue Type: Quality, Customer: Peter Sanderson, Recommended By: Peter Sanderson, Date: 11/24/2008, Cost: 999.00. It includes sections for 'Date Information' (with due dates for completion, revision, follow-up, and additional actions), 'Manager Area' (with suggested actions reviewed by, manager responsible for execution, revision, follow-up, and additional actions), and 'More Info' (describing the opportunity for improvement, affected processes, potential risks, and suggested preventive actions). The second entry, ID: 2, is partially visible. To the right of the table is a form titled 'Add Preventive Action' with a red asterisk indicating required fields. The form includes dropdowns for 'Issue Type' (set to Quality) and 'Customer' (with a 'Select Customer' button), a 'Date' field, a 'Recommended By' dropdown (with a 'Select Recommended By' button), a text area for 'Describe Opportunity for Improvement', a text area for 'Processes Affected', a text area for 'Potential Risks and/or Causes', and a section for 'Upload Risks and/or Causes Analysis'.

Preventive Action E-Mails

All four emails are sent 2 days advance (prior) from its due date to the responsible manager. To receive the email, both due date and responsible manager fields' value are selected. See attachment also.

Preventive Completed Action Reminder Email

Due Date: "Due Date for Actions to be Complete" date field

Receiver: "Manager(s) Responsible to Execute Actions" dropdown field

Preventive Revised Documents Action Reminder Email

Due Date: "Due Date for Revised Documents" date field

Receiver: "Manager Responsible to Revise Documents" dropdown field

Preventive Follow-up Action Reminder Email

Due Date: "Due Date for Follow-up Actions" date field

Receiver: "Manager Responsible to Follow-up" dropdown field

Preventive Additional Action Reminder Email

Due Date: "Due Date for Additional Actions" date field

Receiver: "Manager Responsible for Additional Actions" dropdown field

Inspection

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	Created By
<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 and also 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,

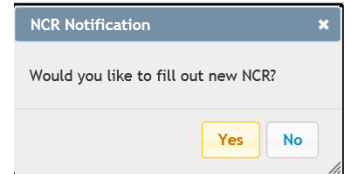
Transport Company:

Send Email: ☒

Select Customer Template: Customer Receiving Reject ▾

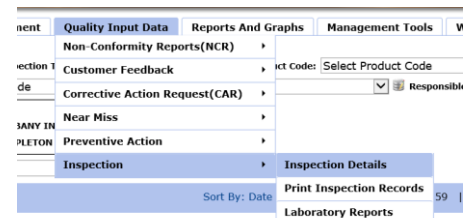
Select Supplier Template: Supplier Receiving Reject ▾

- 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 a 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 (Sample of top Only)

The screenshot displays a software interface for managing inspection records. The main area contains a table with columns: ID, Issue Type, Date Inspected, Responsible Employee, Inspection Results, Suggested Disposition, Description of Resolution, Comment, and Additional Information. Three records are visible, each with a checkbox for editing. The sidebar on the right, titled 'Add Inspection', includes fields for 'ID: New Record', 'Issue Type' (Quality), 'Type of Inspection' (Incoming Inspection), 'Customer/Supplier' (a grid of checkboxes for CIS Customer 2, CIS Customer 3, CIS Supplier 2, CIS Supplier 3, Mehl, and Peter Sanderson), 'Transport Company', 'Send Email', 'Responsible Employee' (a dropdown), 'Select Manager Template' (Customer Receiving Reject), 'Date Inspected' (12/16/2013), 'Product Code' (a dropdown), and 'Product Number'.

ID	Issue Type	Date Inspected	Responsible Employee	Inspection Results	Suggested Disposition	Description of Resolution	Comment	Additional Information
<input type="checkbox"/> ID: 70	Quality	12/16/2013	Peter Sanderson	test	test	test	test	Product Code: Product Number: 1 Batch/Lot Number: 1 Quantity Inspected: 1 Quantity Accepted: 1 Quantity Rejected: 0 Inspection Code: Accepted Cost: \$0.00
<input type="checkbox"/> ID: 69	Quality	11/21/2013	Peter Sanderson	test	test	test	test	Product Code: Canned Peas Product Number: 1 Batch/Lot Number: 1 Quantity Inspected: 0 Quantity Accepted: 0 Quantity Rejected: 0 Inspection Code: Accept - Scrap Cost: \$1.00
<input type="checkbox"/> ID: 68	Quality	11/20/2013	Peter Sanderson	test	test	test	test	Product Code: Product Number: 1 Batch/Lot Number: 1 Quantity Inspected: 10 Quantity Accepted: 1 Quantity Rejected: 9

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 particular 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.

Management

The management Module includes the following Sub Modules (Tools to Manage Your Business):

- Meetings/Audits,
- Objectives,
- Calibration/Maintenance,
- Vendor management,
- Human Resource and Training,
- Special Requirements
- Customer Supplied Product

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

The screenshot displays the 'Customer Supplied Product' management interface. The top navigation bar includes tabs for Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools, Work Orders, Administration, and Sales And Marketing. The 'Management Tools' tab is active, showing a dropdown menu with options: Meetings/Audits, Objectives, Calibration/Maintenance, Vendor Management, Human Resource Management, Special Requirements, and Customer Supplied Property. The 'Customer Supplied Property' option is selected, leading to a form. The form has a 'Customer' dropdown menu set to 'Select Customer', a 'Search In' dropdown set to 'All', and a 'Submit' button. Below the search bar is a '+ New' button and a 'Sort By: Customer' dropdown. The main content area shows a list of CSPs. The first entry is 'CSP Information' with ID: 2, Serial number of CSP: 785966, Customer: CIS Customer 2, Date Received: 10/24/2013, and Date Returned: 10/16/2013. The second entry is 'CSP Information' with ID: 6, Serial number of CSP: 78596699, Customer: CIS Customer 2, Date Received: 10/24/2013, and Date Returned: 10/16/2013. The right sidebar contains a 'Customer' dropdown set to 'Select Customer', a 'Description of CSP' text area, and an 'Upload Picture or Doc' button with a 'Browse...' link.

When the customer supplied product is returned to the customer, click on edit and enter the returned date.

Meetings/Audits

The Meetings/Audits panel provides a system to manage meetings and internal audits including follow-up of action items and the creation of agendas. Furthermore, the Meetings/Audits module includes its own calendar and has the ability to create multiple planned Meetings/Audits (yearly, quarterly or monthly) and/or to clone meetings.

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

Entering a New Meeting or Audit

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

- Meeting/Audit Title,
 - It is **very important** that you maintain some **consistency with the meeting titles**. After using CIs you will have many different types of meetings and audits. CIS provides a search engine so that you may recall groups of similar meetings or audits (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 Audits – IA
 - And so on...
 - The consistent titles will certainly simplify finding your meetings and audits quickly,
 - For more information, see retrieving meetings/audits.
- Date Meeting/Audit Plan Prepared,
- Meeting/Audit Date and Select if the meeting is once, weekly or monthly.
CIS will set-up multiple meetings,
 - When setting up multiple meetings/audits, CIS will immediately create the multiple meetings/audits. Caution should be used when creating these meetings/audits so that you do not create an excessive amount of meetings/audits. For example, creating weekly meetings/audits 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/audits, they are saved as a group. You may add agenda items to one, selected or all meetings/audits at one time (see adding agenda/audit plan items. This is very useful for planning yearly audits or meetings.
- Meeting/Audit Location,
- Meeting/Audit Scheduled Start and Finish Time,
- Meeting/Audit Manager (Manager Calling the Meeting),
- Select the Managers to attend the Meeting/Audit. 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/Audit to the manager's home page calendar,
- Enter any additional comments for the managers to better prepare for the Meeting/Audit,
- You may enter an approximate cost for the Meeting/Audit. 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/Audit 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/Audit,
- Click Save.

* Meeting/Audit Date:
12/18/2013
☐ Onetime ☐ Weekly ☒ Monthly ☐ Quarterly ☐ Yearly
Monthly Recurring
☒ Day of every month(s)
☐ The First of every month(s)
End Date: 12/18/2013

Meeting Agenda/Audit Input Form to Enter a New Meeting or Audit

Sample Top Part Only

HomeDocument ManagementQuality Input DataReports And GraphsManagement ToolsWork OrdersSales And Marketing

Manager: All
Show Archived: ☐ Filter By: Show Recent Meetings
Search In: All Submit

NewSort By: Meeting/Audit Date ^ | Total Records: 3 |
Items Per Page: 25

☐**Meeting/Audit Information**
ID: 67
Meeting/Audit Title: Internal Audit - Daniel Defence
Meeting/Audit Date: 08/19/2014
Meeting/Audit Location: Georgia
Managers Attending
Attendees Employees:
Attendees Users: Peter Sanderson, Peter Sanderson
Meeting/Audit Specifics
Meeting/Audit Starttime: 08:00
Meeting/Audit Endtime: 16:00
Meeting/Audit Manager: Peter Sanderson
Cost: 500.00

☐**Meeting/Audit Information**
ID: 56
Meeting/Audit Title: Internal Audit - Management Responsibility
Meeting/Audit Date: 01/14/2015
Meeting/Audit Location: Management Offices
Managers Attending
Attendees Employees:
Attendees Users: Peter Sanderson, Grant Sharp
Meeting/Audit Specifics
Meeting/Audit Starttime: 09:00
Meeting/Audit Endtime: 12:00
Meeting/Audit Manager: Brett Kelly
Cost: 250.00

Add Meeting/Audit
* Indicates required field
Meeting/Audit ID: New Meeting/Audit
* Meeting/Audit Title:
* Date Agenda/Audit Plan was Prepared:
12/18/2013
* Meeting/Audit Date:
12/18/2013
Onetime Weekly Monthly Quarterly Yearly
* Meeting/Audit Location:
* Meeting/Audit Starttime:
* Meeting/Audit Endtime:
* Meeting/Audit Manager:
Select Manager...

Entering Agenda/Audit Plan Items for the Meeting/Audit

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

HomeDocument ManagementQuality Input DataReports And GraphsManagement ToolsWork OrdersSales And MarketingLogout

Manager: All
Show Archived: ☐ Filter By: Show Recent Meetings
Search In: All Submit

New | Edit | Delete | Archive | View Uploaded Files | Send Email Notification | View Agenda/Audit Plan ItemsSort By: Meeting/Audit Date ^ | Total Records: 3 |
Items Per Page: 25

☐**Meeting/Audit Information**
ID: 67
Meeting/Audit Title: Internal Audit - Daniel Defence
Meeting/Audit Date: 08/19/2014
Meeting/Audit Location: Georgia
Managers Attending
Attendees Employees:
Attendees Users: Peter Sanderson, Peter Sanderson
Meeting/Audit Specifics
Meeting/Audit Starttime: 08:00
Meeting/Audit Endtime: 16:00
Meeting/Audit Manager: Peter Sanderson
Cost: 500.00

☐**Meeting/Audit Information**
ID: 56
Meeting/Audit Title: Internal Audit - Management Responsibility
Meeting/Audit Date: 01/14/2015
Meeting/Audit Location: Management Offices
Managers Attending
Attendees Employees:
Attendees Users: Peter Sanderson, Grant Sharp
Meeting/Audit Specifics
Meeting/Audit Starttime: 09:00
Meeting/Audit Endtime: 12:00
Meeting/Audit Manager: Brett Kelly
Cost: 250.00

Add Meeting/Audit
* Indicates required field
Meeting/Audit ID: New Meeting/Audit
* Meeting/Audit Title:
* Date Agenda/Audit Plan was Prepared:
12/18/2013
* Meeting/Audit Date:
12/18/2013
Onetime Weekly Monthly Quarterly Yearly
* Meeting/Audit Location:
* Meeting/Audit Starttime:
* Meeting/Audit Endtime:
* Meeting/Audit Manager:

Agenda/Audit Plan Input Form

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

Meeting ID#: 67 << Back to Meetings/Audits

New Sort By: Priority ^ | Total Records: 1 | Items Per Page: 25

☐ 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 By:
Verified Date:

Add Agenda/Audit Plan Item
* Indicates required field

Action Item ID:
New Agenda/Audit Plan

Meeting/Audit ID:
67 - Internal Audit - Daniel Defence - 08/19/2014
64 - Internal Audit - Daniel Defence - 08/19/2011
65 - Internal Audit - Daniel Defence - 08/19/2012
66 - Internal Audit - Daniel Defence - 08/19/2013

Hold down control key to select multiple items

* Agenda/Audit Plan Title:

Applicable Documents:

Agenda/Audit Plan Details:

Action Items Description:

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

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

For the Plan, enter the:

- Agenda/Audit Plan Title,
- Applicable Documents,
- Agenda/Audit Plan Details
- Scroll down and click Insert if you wish to continue to enter new Agenda/Audit Plan items or Insert and Go to Meeting if you have finished entering the Agenda/Audit Plan items. When you click Insert, you will be presented with another Agenda/Audit 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/Audit Plan Items for Multiple Meetings/Audits

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

When entering the agenda/audit 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/audit plan added. Below

shows two of the four meetings selected. That means that the agenda/audit plan item will be added to the two meetings selected only and not the other two.

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

Suggestions: This feature will simplify data entry and also 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:

Items	P
<input type="checkbox"/>	
<input type="checkbox"/>	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:
<input type="checkbox"/>	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/audit, you must edit the agenda/audit 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.

Note: When completing actions as a result of an internal audit, you should include the auditor who is responsible for verification and closing the action item so that this will also appear on the auditor's home page as an action item.

When the action items are completed, the responsible manager (or Internal Auditor) 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. If it is an audit, normally the internal auditor will complete this task. Otherwise, the manager performing the action item may also close the item (result of a meeting).

To close the item, edit the agenda/audit 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/Audits)

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

Manager: All
Show Archived: ☐ Filter By: Show Recent Meetings
Search In: All Submit
+ New Sort By: Meeting/Audit Date Total Records: 3
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,
 - Audit/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.

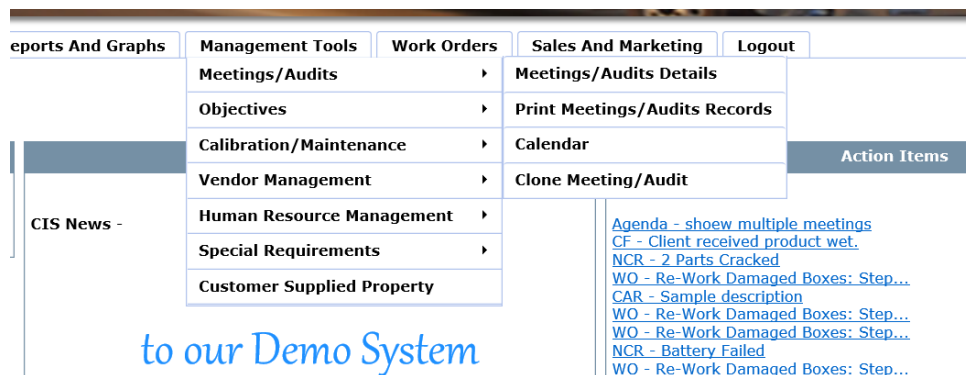
Meeting/Audit Calendar

In the meeting/Audits section there is a calendar. This calendar is slightly different than the master calendar because:

- It displays only Meetings and Audits,
- It displays the TITLE of the Meeting/Audits (very helpful).

Cloning a Meeting/Audit

You may clone a meeting/audit or group of meetings/audits by selecting the Clone Meeting/Audit.



When you clone a meeting, CIS clones the meeting/audit and all of the agenda/audit 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/audit you want to clone or they will appear in the cloned meetings/audits. In other words, if you clone a completed meeting/audit, you will need to edit the cloned meeting/audit and remove the specifics that were entered from the previous meeting that you cloned. To clone select the meeting/audit and then the desired meeting/audit date.

Clone Meeting/Audit

* Indicates required field

Meeting/Audit: CTPAT - Establishment of Team - 09/23/2011

* Meeting/Audit Date: 12/20/2013

[Clone](#)

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 on a daily basis, 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 module 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 sufficient 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

Issue Type: Customer/Supplier:
Search In:
Show Archived: ☐

 New

Sort By: ID 

☐

☐ **Objective Information**

ID: 2
Issue Type: Quality
Customer/Supplier: Peter Sanderson
Process: Picking Errors
Objective Date: 09/22/2009
Desired Date: 12/10/2009
Managers Responsible
Managers Responsible: Bretta Kelly, Grant Sharp, Peter Group
Objective Criteria
Measurable Criteria: Percent
Current Measurement: 10
Desired Measurement: 5

☐ **Objective Information**

ID: 3
Issue Type: Quality
Customer/Supplier: Peter Sanderson
Process: soldering board
Objective Date: 08/27/2010
Desired Date: 02/28/2011
Managers Responsible
Managers Responsible: Peter Sanderson, Bretta Kelly, Grant Sharp
Objective Criteria
Measurable Criteria: bhand burning qty/month
Current Measurement: 3
Desired Measurement: 1

☐ **Objective Information**

ID: 4
Issue Type: Quality
Customer/Supplier:
Process: Welding
Objective Date: 08/18/2011
Desired Date: 11/30/2011
Managers Responsible
Managers Responsible: Peter Sanderson, Bretta Kelly, Grant Sharp, Dan Holley
Objective Criteria
Measurable Criteria: Scrap due to cracks
Current Measurement: 11 percent
Desired Measurement: 4 percent

☐ **Objective Information**

ID: 5
Issue Type: Quality
Customer/Supplier: CIS Supplier 3
Process: Drilling Application P/N 7887
Objective Date: 03/18/2013
Desired Date: 05/31/2013
Managers Responsible
Managers Responsible: Bretta Kelly, BARRIOS, GERANGEL, BARNES, EDDIE, BUFFINGTON, PHILLIP
Objective Criteria
Measurable Criteria: Burrs on edge
Current Measurement: 15% Rejected with Burrs
Desired Measurement: 5 %

☐ **Objective Information**

Edit Quality Improvement Objective

* Indicates required field


Objective ID:

2

Issue Type:

Quality

* **Objective Date:**

09/22/2009 

Customer/Supplier:

Peter Sanderson

* **Process:**

Picking Errors

* **Measurable Criteria:**

Percent


* **Current Measurement:**

10

Desired Measurement:

5

Desired Date:

12/10/2009 

Managers Responsible:

☒ Bretta Kelly ☒ Grant Sharp ☐ Mark Wallen
☒ Peter Group ☐ Peter Sanderson

Objective Achieved:

☐ Yes ☒ No


Explain:

Archive Flag:

☐

Caption:

File Name:



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

Objective or Project Follow-Up and History Log

Once objectives are entered, it is not sufficient 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 system interface. At the top, there are filters for 'Issue Type' (All) and 'Customer/Supplier' (All), along with a 'Search In' dropdown and a 'Submit' button. Below this is a navigation bar with links: 'New', 'Edit', 'Delete', 'Archive', 'View Uploaded Files', 'View Objective Log', and 'Sort By: ID'. The main content area is divided into two sections. The left section, titled 'Objective Information', shows details for Objective ID: 2, including 'Issue Type: Quality', 'Customer/Supplier: Peter Sanderson', 'Process: Picking Errors', 'Objective Date: 09/22/2009', 'Desired Date: 12/10/2009', 'Managers Responsible: Bretta Kelly, Grant Sharp, Peter Group', and 'Objective Criteria: Measurable Criteria: Percent, Current Measurement: 10, Desired Measurement: 5'. The right section, titled 'Edit Quality Improvement Objective', shows the same details with a 'Process' dropdown set to 'Picking Errors'. Below the objective information is a table titled 'Objective Logs Information' with three entries. The first entry (ID: 3) has a status of 'Tested the new picking accuracy scanner program with great success. The software checks the scan and compares the product with the weight to ensure it is accurate.' The second entry (ID: 4) has a status of 'Called Toyo to discuss reducing picking errors with logic relational scanning equipment. Having a meeting next week.' The third entry (ID: 5) has a status of 'Tested the new picking accuracy scanner program with great success. The software checks the scan and compares the product with the weight to ensure it is accurate.' To the right of the table is a form titled 'Add Objective Log' with fields for 'Verification Date' (12/19/2013), 'Objective Cost' (\$0.00), 'Verified By' (Select Manager...), and 'Status'. There are 'Save' and 'Cancel' buttons 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 module is designed to manage all of 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 Sample of Top Only

New
Sort By: ID ▾ | Total Records: 8 |

Items Per Page: 25 ▾

☐

☐ **Equipment Information**
ID: 1
Instrument/Machine Serial Number: 68567565
Managers Responsible
Manager Responsible For Calibration: Bretta Kelly
Procedure
Calibration/Maintenance Procedure: Compare to master gage blocks and verify visual condition and if vernier shows signs of wear.
Details
Instrument/Machine Manufacturer: Federal Instruments
Instrument/Machine Measurement Increments: 0.001"
Instrument/Machine Accuracy +/-: 0.001"

☐ **Equipment Information**
ID: 2
Instrument/Machine Serial Number: 54545454
Managers Responsible
Manager Responsible For Calibration: Peter Sanderson
Procedure
Calibration/Maintenance Procedure: Calibrate by comparison to NBS Certified Weights. Use min, middle and maximum. Place sticker on front of scale.
Details
Instrument/Machine Manufacturer: Toledo
Instrument/Machine Measurement Increments: 0-500 Lbs
Instrument/Machine Accuracy +/-: 1

☐ **Equipment Information**
ID: 3
Instrument/Machine Serial Number: 25555
Managers Responsible
Manager Responsible For Calibration: Peter Sanderson
Procedure
Calibration/Maintenance Procedure: Calibrate and Clean. Calibrate by comparison to Master Standard Blocks. Calibrate at 0.00, 3.00 and 6.00".
Details
Instrument/Machine Manufacturer: Zeiss
Instrument/Machine Measurement Increments: 0-6"
Instrument/Machine Accuracy +/-: 0.001"

☐ **Equipment Information**
ID: 4
Instrument/Machine Serial Number: 2556
Managers Responsible
Manager Responsible For Calibration: Peter Sanderson
Procedure
Calibration/Maintenance Procedure: Calibrate and Clean. Calibrate by comparison to Master Standard Blocks. Calibrate at 0.00, 3.00 and 6.00".
Details

Add Calibration/Maintenance
* Indicates required field

Equipment ID:
New Equipment

* Manager Responsible For Calibration:
Select... ▾

* Date Record Set-Up:
12/19/2013

* 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:

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.

Home | Document Management | Quality Input Data | Reports And Graphs | **Management Tools** | Work Orders | Sales And Marketing | Logout

Show Retired Items: ☐ Manager: All ▾ Calibrated By: Calibrated In House ▾

Search In: All ▾

☐

☒ **Equipment Information**
ID: 1
Instrument/Machine Serial Number: 68567565
Managers Responsible
Manager Responsible For Calibration: Bretta Kelly
Procedure
Calibration/Maintenance Procedure: Compare to master gage blocks and verify visual condition and if vernier shows signs of wear.
Details
Instrument/Machine Manufacturer: Federal Instruments
Instrument/Machine Measurement Increments: 0.001"
Instrument/Machine Accuracy +/-: 0.001"

☐ **Equipment Information**
ID: 2
Instrument/Machine Serial Number: 54545454
Managers Responsible
Manager Responsible For Calibration: Peter Sanderson
Procedure

Add Calibration/Maintenance
* Indicates required field

Equipment ID:
New Equipment

* Manager Responsible For Calibration:
Select... ▾

* Date Record Set-Up:
12/19/2013

* Instrument/Machine Description:

* Instrument/Machine Serial Number:

* Instrument/Machine Location:

* Instrument/Machine Manufacturer:

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

Equipment ID#: 1 << Back to Calibration Details

New Sort By | Total Records: 4 | Items Per Page: 25

Calibration Logs Information

- ID: 1
Calibration Certificate Number: 2245
Calibration Cost: 900.00
Calibration Performed: 11/24/2008
Calibration Due Date: 10/21/2009
- ID: 2
Calibration Certificate Number: 255
Calibration Cost: 20.00
Calibration Performed: 02/12/2010
Calibration Due Date: 05/21/2010
- ID: 22

Calibration Log

* Indicates required field

Calibration Log ID : New Calibration Log

Equipment ID:
1

Instrument/Machine Serial Number:
68567565

* Calibration Cost:
\$ 0.00

Calibration Performed:
12/19/2013

* Calibration Certificate Number:

Calibration Certificate:

- Select the Instrument Serial Number, test or inspection,
- Enter Calibration Cost,
- Enter the date of calibration, test or inspection or 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 and/or Repair Log Details

Entering maintenance or repair details works the same as the calibration except one must click view maintenance log or repair log and 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	
	Serial Requirements			

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.

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

Edit Vendor Approval Log Form

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

Vendor ID#: 1 << Back to Vendor Details

+ New Sort By | Total Records: 4 | Items Per Page: 25

☐ Vendor Logs Information
VSMLogID: 1
Reevaluation Results: Reviewed last three HACCP plans and all were acceptable.
Accepted By: Peter Sanderson
Reevaluation Date: 10/30/2009

☐ Vendor Logs Information
VSMLogID: 2
Reevaluation Results: Reevaluated
Accepted By: Peter
Reevaluation Date: 01/27/2010

☐ Vendor Logs Information
VSMLogID: 3
Reevaluation Results: earyetsdry
Accepted By: wvasherv

Add Vendor Log
* Indicates required field

Vendor Log ID:

New Vendor Log

* **Reevaluation Date:**
12/23/2013

* **Reevaluation Results:**

* **Accepted By:**

Caption: **File Name:** Browse...

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.

Enter the:

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

- Select sub components if required. This is when you want CIS to automatically create a pick list of products needed to assemble this particular 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.

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

- 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

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Logout

Show Archived: ☐ Product Category: All

New
Sort By: Product Description
Total Records: 18
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 type="checkbox"/>	Bolts 4556	Ordered Material	Bolts 4556	per 100	7.00	Verify Part/Number and Visual	10.00	150.00	Peter Sanderson
<input type="checkbox"/>	Computer 2 GB Ram		Computer 2 GB Ram	each	125.00		500.00	25.00	Peter Sanderson
<input type="checkbox"/>	Computer Case	Main Product	Computer Case	each	85.00		500.00	25.00	Peter Sanderson
<input type="checkbox"/>	Computer Case Screws		Computer Case Screws	eac	0.25		5,000.00	100.00	Peter Sanderson
<input type="checkbox"/>	Computer Graphics Card		Computer Graphics Card	each	125.00		500.00	25.00	Peter Sanderson
<input type="checkbox"/>	Computer Hard	Ordered Material	Computer	each	250.00		500.00	25.00	Peter

Add Product/Service
Indicates required field

* Product Category:
Ordered Material

* Product Name:

* Product Description:

*Product	*Quant
Computer Case	1
Computer Sound Card	1

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

Sample Input Form

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

Print

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 Management Tools 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 sub components/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.

The screenshot shows a pop-up window titled "Bind Product". At the top, a red warning message states: "You can not build this product as items in this product have not sufficient stock." Below this, a table lists items with their names and quantities. The table has two columns: "Item Name" and "Quantity". The first row is "Computer Motherboard" with a quantity of 5. The second row is "ExistingRequireNeed" with a quantity of 5. Below the table, there are input fields for "Job Number:", "Customer:", "Quantity:", and "Date:". The "Job Number" field contains "2012", the "Customer" field contains "Peter Sanderson", the "Quantity" field contains "5", and the "Date" field contains "12/23/2013".

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 Module.

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 |

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.

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

Items Per Page: 25

<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

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 Tr](#)

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="Edit"/>

*** 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.

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

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

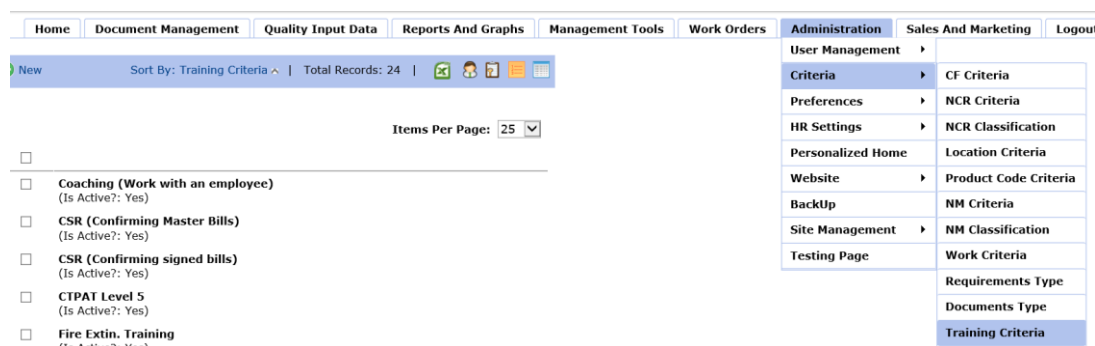
CIS includes a system to plan, report and record employee performance reviews and a new system that associates groups of standard training with position titles so that when a new employee is added, CIS will automatically schedule the training and advise the applicable manager by e-mail of the plan. In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

HR Overview

The HR Training module keeps records of all employees including the documentation, certificates, background checks and more. The module 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 into this module. Also, be careful to only allow access (see users) to appropriate managers that have a need to know this information.

Training Set-Up

The first step is to establish standard training titles. In the administration panel under criteria, there is a set-up for training criteria:



Click on +New Criteria to add standard training seminars or activities such as new employee orientation, safety training, ISO 9001 Training, Food Safety training and any other types of training that occurs regularly. By adding these training criteria's, they will appear in the selectable list for training.

The second step is to provide details of each of the standard training titles and to associate these trainings with employee position titles so that CIS will automatically schedule training of new employees.

Click on Administration/HR Settings/Standard Training Template. This will display a selectable list of all of the standard training titles that were entered above. Select each standard training title and enter the details for the training:

- Other associated training that may be required in the future,
- Training hours,
- The Trainer's name,
- Comments,
- The responsible manager to ensure that the employee attends the training,
- Cost of the training (cost for one employee – NOT THE TOTAL COST FOR THE TRAINING SESSION),
- Amount of advanced days warning for CIS to advise the responsible manager of the training.

Standard Training Template Input Form Sample of Top

Once all of the standard training details are complete, Click on Administration/HR Settings/Position Template and begin to add the position titles and associate the standard training requirements with each position. Select the position title then by holding down the Ctrl key on your key board, mouse click all of the applicable standard training to be associated with the position. These are the standard trainings that CIS will automatically schedule when a new employee is added to the HR system (*no more missed training!*)

Position/Training Template Input Form Sample Top Only

Adding a New Employee

To enter the HR module, 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 Module:

- 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
- Drivers License
- Other Identification
- Previous Employer
- Previous Position
- Length in months at previous position
- Reference Check Confirm box
- Reference check comments
- Upload back ground check file
- Comments
- 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

Home Document Management Quality Input Data Reports And Graphs **Management Tools** Work Orders Administration Sales And M

Manager: All Search In: All Show Archived: ☐

Sort By: Name | Total Records: 117 | Items Per Page: 25

Add Employee

* Indicates required field

* Name:

Email Address:

Photo: Browse...

* Home Address:

Home Phone:

Cell Phone:

Employee Information
Name: ALBRIGHT, JEANETTE C
Email Address: peter@tqms.com
Position Details
Position: Truck Driver
Department: Atlanta Truckings
Manager: Peter Group

Employee Information
Name: ALLEN, JAMES
Email Address: peter@tqms.com
Position Details
Position: Truck Driver
Department: Atlanta Trucking
Manager: ALBRIGHT, JEANETTE C

Employee Information
Name: BALLARD, PALLANCE A.
Email Address: peter@tqms.com
Position Details

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.

The screenshot displays the 'Edit Performance/Competency Review' interface. The top navigation bar includes links for Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools, Work Orders, Administration, Sales And Marketing, and a user profile icon. Below the navigation bar, there's a filter for 'Employee: All Employees' and a link to '<< Back to Employee Details'. The main content area is split into two panes. The left pane shows a list of employee records with columns for Employee Name, Responsible Manager, and Review Date. The right pane is the 'Edit Performance/Competency Review' form, which includes fields for Employee Name, Review Date, a checkbox for 'No Further Competency Reviews Required', a 'Comments' text area, and a 'Responsible Manager' dropdown. At the bottom, there are fields for 'Caption' and 'File Name' with a 'Browse...' button.

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 and also 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

Establish and Planning 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 'Set-Up Training Input Form'. At the top, there is a navigation bar with tabs: Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools, Work Orders, Administration, Sales And Marketing, and Logout. Below the navigation bar, there are filters for Employee, Training Criteria, and Manager. The main content area is divided into two parts. On the left, there is a list of existing trainings with columns for Employee, Due Date, and Training Details. On the right, there is a detailed 'Add Training' form. The form includes fields for Employee Name (a dropdown menu), Due Date (a date picker), Standard Training (a dropdown menu), Other Training (a text area), Hours (a text field), Trainer (a text field), and Comments (a text area). The form also has a 'New' button and a 'Sort By: Due Date' dropdown.

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.

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 of the employees who received the same training by checking the check box on top which will select all of 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 shows a web application interface for managing training records. At the top, there are tabs: Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools (selected), and Work Ord. Below the tabs, there are filters for Employee (All), Training Criteria (All), and Manager. The 'Show' dropdown is set to 'Pending Training'. A 'Search In' dropdown is set to 'All'. A 'Submit' button is next to the search dropdown. Below the filters, there is a toolbar with buttons: New, Delete, Print Selected, Set as complete (highlighted), and Sort By: Due Date. To the right of the toolbar, it says 'Total Records: 7'. Below the toolbar, there is a table of training records. The first record is for BARNES, RODNEY, dated 10/29/2013. It includes details for Training Details, Completion Date, Cost of Training (\$), Manager Responsible, and Performance Comments. The second record is for BECKHAM, COREY, dated 10/28/2013, with similar details. The 'Set as complete' button is highlighted in the toolbar.

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

The screenshot shows a web application interface for completing a training record. At the top, there are tabs: Home, Document Management, Quality Input Data, Reports And Graphs, Management Tools (selected), and Work Ord. Below the tabs, there are filters for Employee (All), Training Criteria (All), and Manager (All). The 'Show' dropdown is set to 'Pending Training'. A 'Search In' dropdown is set to 'All'. A 'Submit' button is next to the search dropdown. Below the filters, there is a toolbar with buttons: New, Delete, Print Selected, Set as complete (highlighted), and Sort By: Due Date. To the right of the toolbar, it says 'Total Records: 7'. Below the toolbar, there is a table of training records. The first record is for BARNES, RODNEY, dated 10/29/2013. It includes details for Training Details, Completion Date, Cost of Training, Manager Responsible, and Performance Comments. The second record is for BECKHAM, COREY, dated 10/28/2013, with similar details. The 'Set as complete' button is highlighted in the toolbar.

- 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.

Important Note: Search criteria can be combined with the other filters to better pin point 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 of 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.

Home Document Management Quality Input Data Reports And Graphs Management Tools Work Orders Administration Sales And Marketing Logout						
Employee: <input type="text" value="All Employees"/>						
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	
YEARIAN, CAROL	10/25/2013	Root Cause Analysis Training	Other Training	8.00	495.00	
YEARIAN, CAROL	10/25/2013	Root Cause Analysis Training	Other Training	8.00	495.00	
YEARIAN, CAROL	10/25/2013	Root Cause Analysis Training	Other Training	8.00	495.00	
BARRIOS, GERANGEL	10/25/2013	Hazardous Material Training	Education in Emergencies Training Package. Developed by INEE and	2.00	60.00	
WHITE, JAMES	10/16/2013	Listeria Training	Other Training	1.00	20.00	
Jeff Kaplan	09/04/2013	Coaching (Work with an employee)		40.00	350.00	
Jeff Kaplan	09/04/2013	CSR (Confirming signed bills)		2.00	60.00	
Jeff Kaplan	09/04/2013	CTPAT Level 5		2.00	45.00	
Jeff Kaplan	09/04/2013	Fire Extn. Training		1.00	20.00	
Jeff Kaplan	09/04/2013	Fit Testing		1.00	30.00	
Jeff Kaplan	09/04/2013	Fork Lift Training (Big Town)		2.00	60.00	
Jeff Kaplan	09/04/2013	ISO Training		2.00	35.00	
Jeff Kaplan	09/04/2013	ITAR Basic		3.00	60.00	
Jeff Kaplan	09/04/2013	Listeria Training		0.00	0.00	
Jeff Kaplan	09/04/2013	New Employee Indoctrination		2.00	50.00	
Vicki Delaney	08/30/2013	Coaching (Work with an employee)		40.00	350.00	

Printing Detailed Training Records

There are two methods to print training records.

Method One:

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.

Additional Uses for Special Requirements

In addition to maintaining special requirements for customers, products processes or services, this module may also be used to further maintain documents. For example, you may want to have all of 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.

Sales and Marketing -

This module 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.

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

Client Type: All Assign To User: All Closed By: All

Show Archived: ☐ ☐

Search In: All Submit

New Sort By: ID Total Records: 11 Items Per Page: 25

Add Sales & Marketing

* Indicates required field

Sales & Marketing ID: New Sales & Marketing

* Customer:

* Contact Method:

Referred By:

Client Type:

Projected Date:

Assigned To:

Date Closed:

☐ Sales Marketing Information
ID: 11
Customer: Patel Hitesh
Client Type: One-Time Customer
Assigned To: Peter Sanderson
Closed By: Brett Kelly

☐ Sales Marketing Information
ID: 10
Customer: Patel Mukesh
Client Type: Repeat Customer
Assigned To: Peter Group
Closed By: Peter Group

☐ Sales Marketing Information
ID: 9
Customer: Patel Neel
Client Type: Repeat Customer
Assigned To: Peter Sanderson
Closed By: Grant Sharp

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 sales person’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 sales person 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.

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 module, 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:

- 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.

Sales and Marketing Log Entry Input Screen

Home | Document Management | Quality Input Data | Reports And Graphs | Management Tools | Work Orders | Administration | Sales And Marketing

Sales Marketing ID #: 11 [<< Back to Sales Marketing](#)

Show Archived: ☐

New Sort By: ID | Total Records: 1 | Items Per Page: 25

☐ **Sales Marketing Logs Information**
ID: 18
Action Performed: Marketing Communications module offered by the Chartered
Responsible Manager: Bretta Kelly
Log Entered By: Peter Sanderson

Add Sales & Marketing Log Entry

* Indicates required field

Sales & Marketing LogID: New Sales & Marketing Log ID

* **Action Performed:**

* **Next Action Required:**

* **Responsible Manager:**
Select Manager

* **Due Date:**

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

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

* **Customer Feedback:**

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.

[Home](#) | [Document Management](#) | [Quality Input Data](#) | [Reports And Graphs](#) | [Management Tools](#) | [Work](#)

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:

Suggested Training Required for Implementation

In order to achieve the most from your new continuous improvement system using CIS, we recommend the following training steps:

Step 1: Administrator(s) must be trained on how to set up CIS:

- How to approve, load and revise procedures, work instructions, etc,
- How to set up preferences, CIS settings and criteria for CF, NCR, NM, etc,
- How to load users, vendors and customers including importing features,
- Templates, document types, manager's email and general system administration.

Step 2: Complete training matrix which identifies what training is required for each employee.

Step 3: Administrator gets training on how to set up and manage training in CIS

Step 4: Administrator sets up training in CIS per the training matrix

Recommended order of training:

- Administration, set up users, vendors, NCR criteria, etc.
- CIS Overview, combine this with an overview of ISO or AS 9100 if you are using CIS to meet the requirements to a standard (Handbook)
- How to login, home page, view calendar, procedures, reports, PRR
- Sales and Marketing
- CF (Non Conformity found by customer) and Positive Customer Satisfaction
- Corrective Action
- NCR (internal Non Conformity)
- NM (Near Miss, potential Non Conformity)
- Corrective Action
- Special Requirements
- Inspection (Receiving, In Process and Final)
- Vendor Management
- Work Order
- Customer Supplied Product
- HR Module
- Training Module
- Objectives
- Management Meetings
- Internal Audits
- Calibration
- Maintenance

Recommended Training Matrix

Employee/department	ISO-CIS Overview (Handbook)	How to login, home page, view calendar, procedures,	Administration, set up users, vendors, NCR criteria, etc.	NCR (internal Non Conformity)	CF and Positive Customer Satisfaction	NM ,Near Miss, potential Non Conformity	Corrective Action	Inspection (Receiving, In Process and Final)	HR Module	Vendor Management and Inventory	Training Module
Sales/Marketing	X	X			X		X			X	X
Customer Service	X	X			X		X			X	
Purchasing	X	X			X		X	X		X	
Internal Auditors										X	
CIS Administrator	X	X	X	X	X	X	X	X		X	X
User (Manufacturing and/or Quality)	X	X								X	
Managers (authority/responsibility to assign or be assigned CAR or actions from meetings)	X	X		X	X	X	X	X		X	
Receiving	X	X		X	X	X	X	X		X	
Inspection/Quality	X	X		X	X	X	X	X		X	
Maintenance	X	X									
Calibration											
HR	X	X									X
Managers who conduct training / perform reviews											X

