Qualsys

Leading GRC and Quality Management Solutions

EQMS QUICK START GUIDE

BY QUALSYS LTD

NAVIGATION TREE

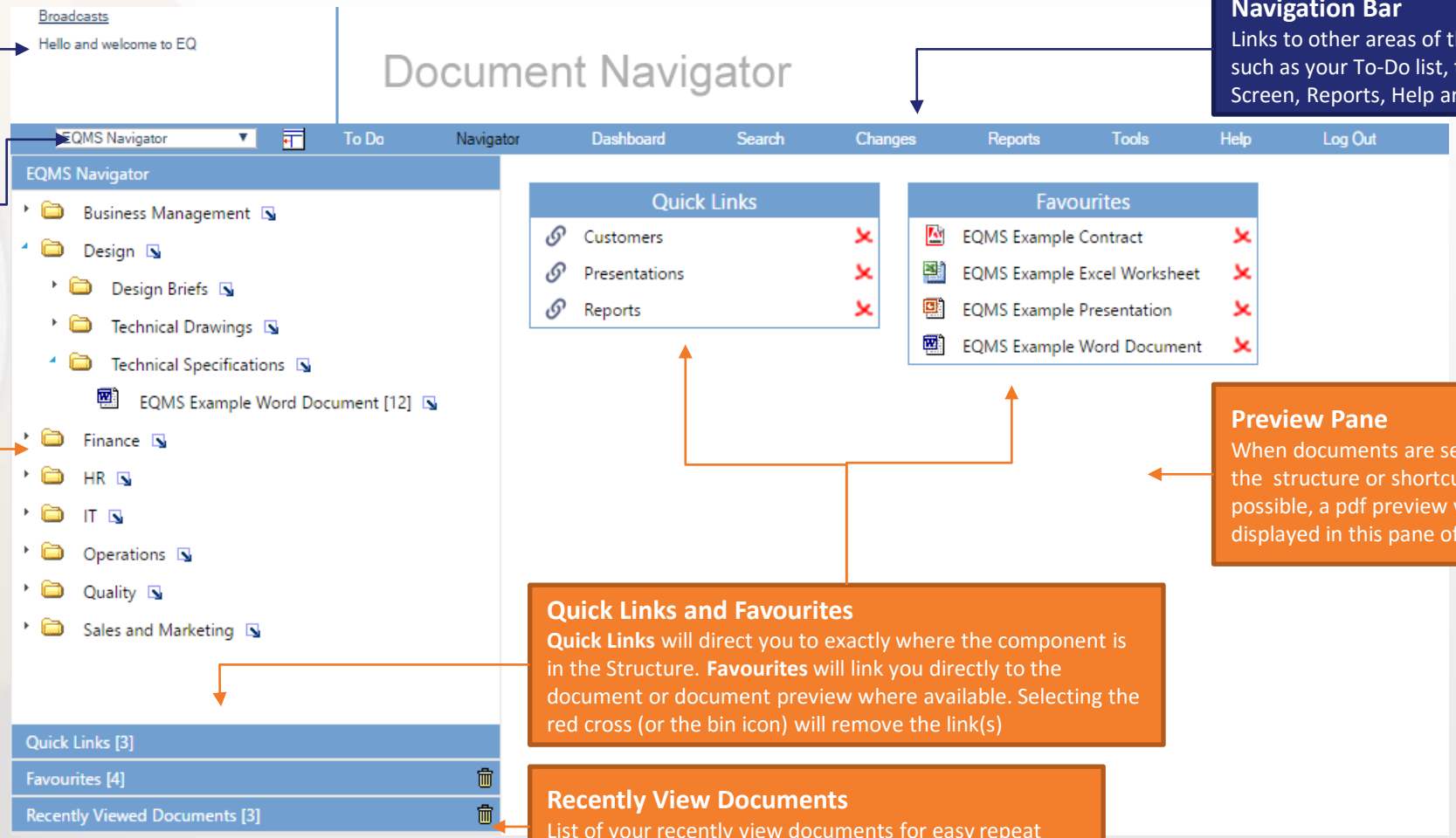
Often the first page you will see in the system, EQMS Navigator gives users a simple, recognisable and searchable structure to help locate the documents they require. With the addition of Quick Links and Favourites, any document is only a few short clicks or taps away

Broadcasts
Messages set by Administrators and Broadcast Managers will be displayed here

Module Access
This dropdown list allows you to navigate easily between EQMS Modules

Navigation Tree
This structure displays a visual list of links to the documents stored in the system. Selecting a Component will expand the structure where applicable allowing you to drill down to the documents you need in an organised and familiar manner.
Your view of the Structure may vary depending on your permissions

Right-Click
Rick-Clicking (or selecting the Blue Arrow icon to the right of) a component reveals a list of additional options. The options available to you will vary depending on your permissions.
Options include; Feedback, Add to Favourites and Search



Navigation Bar
Links to other areas of the Module such as your To-Do list, the Search Screen, Reports, Help and Log Out

Preview Pane
When documents are selected from the structure or shortcuts, where possible, a pdf preview will be displayed in this pane of the screen.

Quick Links and Favourites
Quick Links will direct you to exactly where the component is in the Structure. **Favourites** will link you directly to the document or document preview where available. Selecting the red cross (or the bin icon) will remove the link(s)

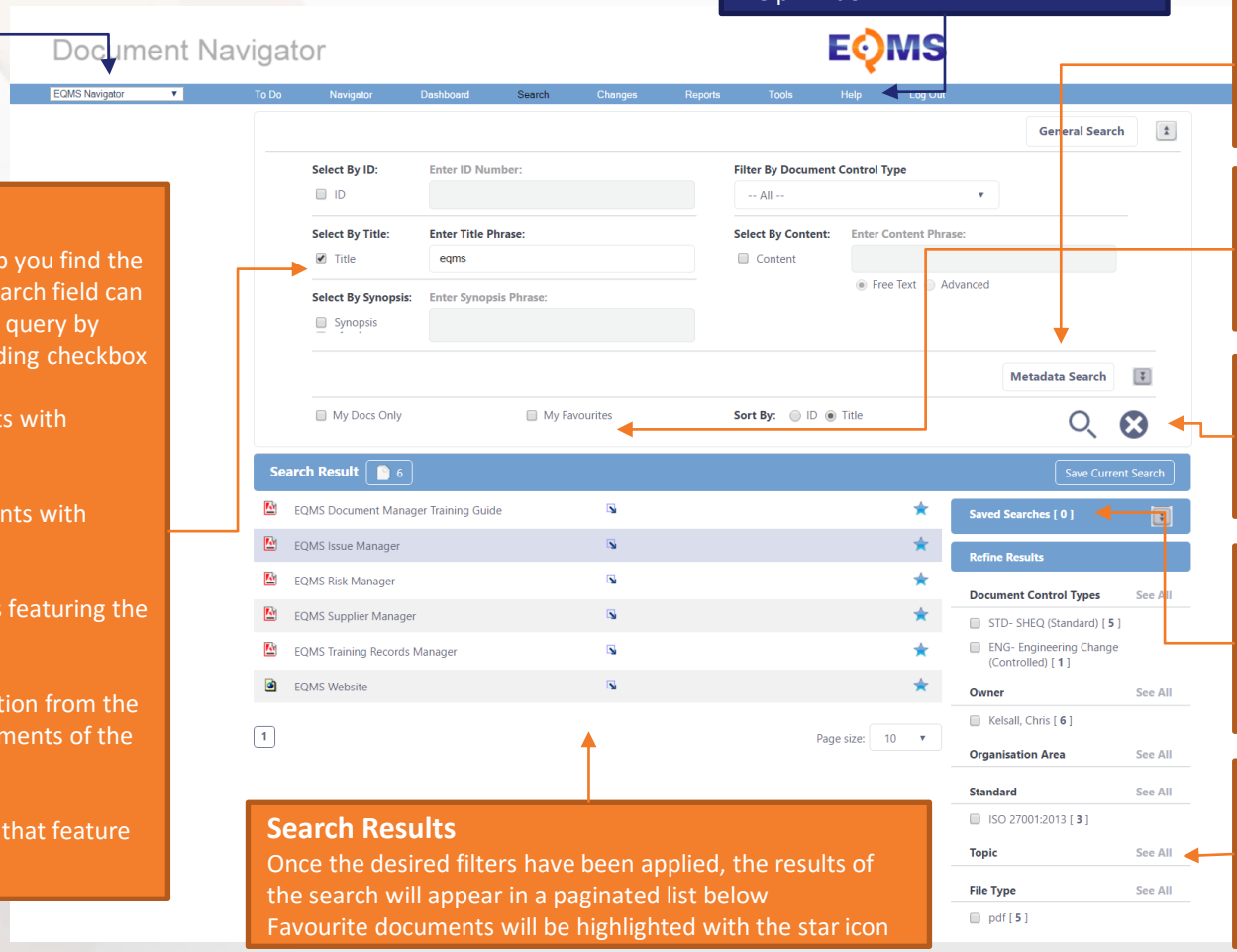
Recently View Documents
List of your recently view documents for easy repeat access. This list can be cleared by selecting the Bin icon.

SEARCH SCREEN

EQMS Search allows you to locate documents outside of the standard Navigation Structure.
We created this guide to help you make the most of this functionality

Module Access
This dropdown list allows you to navigate easily between EQMS Modules

Need Help?
Click here to reveal the pop-up EQMS Help window



General Search Fields
filters and search fields available to help you find the documents you are looking for. Each search field can be applied or removed from the search query by checking or un-checking the corresponding checkbox

ID – Narrow results down to documents with corresponding ID

Title – Narrow results down to documents with corresponding Title

Synopsis – Narrow down to documents featuring the entered keyword in their Synopsis

Document Control Type – Select an option from the list to narrow down the results to documents of the selected Type

Content - Narrow down to documents that feature entered keyword in their content

Search Results
Once the desired filters have been applied, the results of the search will appear in a paginated list below
Favourite documents will be highlighted with the star icon

Metadata Search
Expand the Metadata Search fields by selecting the **Expand** icon. From here, you will be able to select additional user defined data fields to use in your current Search.

My Docs and My Favourites
Checking the relevant checkbox will filter the results to only show those which are either **Documents you Own** (My Docs Only) or your **Favourites**

Submit Search
Select the Magnifying Glass icon to submit your current search query.
Clear all search fields by selecting the Cross icon

Save Search
EQMS allows you to save your current search query for use at a later date. For this, simply select **Save Current Search** and give the search query a title. Saved searches are available for selection by expanding the **Saved Searches** field.

Refine Results
Once you have submitted your search query, the results can be refined further. Checking the corresponding checkbox will refine the results to show only those which also match the refined criteria.