



# Qualsys

Leading GRC and Quality Management Solutions

The cover features a large, faint, stylized gear or wheel graphic in the background, composed of several concentric rings and a central hub. The design is split diagonally from the bottom-left to the top-right. The upper-left portion is white, the lower-left portion is a dark blue, and the entire right half is a solid orange. The title 'EQMS QUICK START GUIDE' is written in a dark blue, sans-serif font, following the diagonal line. Below it, 'BY QUALSYS LTD' is written in a smaller, lighter blue, sans-serif font, also following the diagonal line.

# 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

Right-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

The screenshot shows the EQMS Navigator interface. At the top, there's a 'Broadcasts' section with the message 'Hello and welcome to EQ'. Below this is a navigation bar with tabs: 'EQMS Navigator', 'To Do', 'Navigator', 'Dashboard', 'Search', 'Changes', 'Reports', 'Tools', 'Help', and 'Log Out'. The main area is divided into two columns. The left column contains a 'Navigation Tree' with a hierarchical list of folders: 'Business Management', 'Design', 'Design Briefs', 'Technical Drawings', 'Technical Specifications', 'Finance', 'HR', 'IT', 'Operations', 'Quality', and 'Sales and Marketing'. The right column contains 'Quick Links' and 'Favourites' sections. 'Quick Links' lists 'Customers', 'Presentations', and 'Reports'. 'Favourites' lists 'EQMS Example Contract', 'EQMS Example Excel Worksheet', 'EQMS Example Presentation', and 'EQMS Example Word Document'. At the bottom, there are three sections: 'Quick Links [3]', 'Favourites [4]', and 'Recently Viewed Documents [3]'. Annotations with arrows point from text boxes to these elements: 'Broadcasts' to the top message, 'Module Access' to the dropdown menu, 'Navigation Tree' to the folder list, 'Right-Click' to the blue arrow icon, 'Navigation Bar' to the top tabs, 'Quick Links and Favourites' to the respective sections, and 'Recently View Documents' to the bottom list.

Document Navigator

EQMS Navigator

Quick Links

- Customers
- Presentations
- Reports

Favourites

- EQMS Example Contract
- EQMS Example Excel Worksheet
- EQMS Example Presentation
- EQMS Example Word Document

Quick Links [3]

Favourites [4]

Recently Viewed Documents [3]

## 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

Document Navigator

## 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.