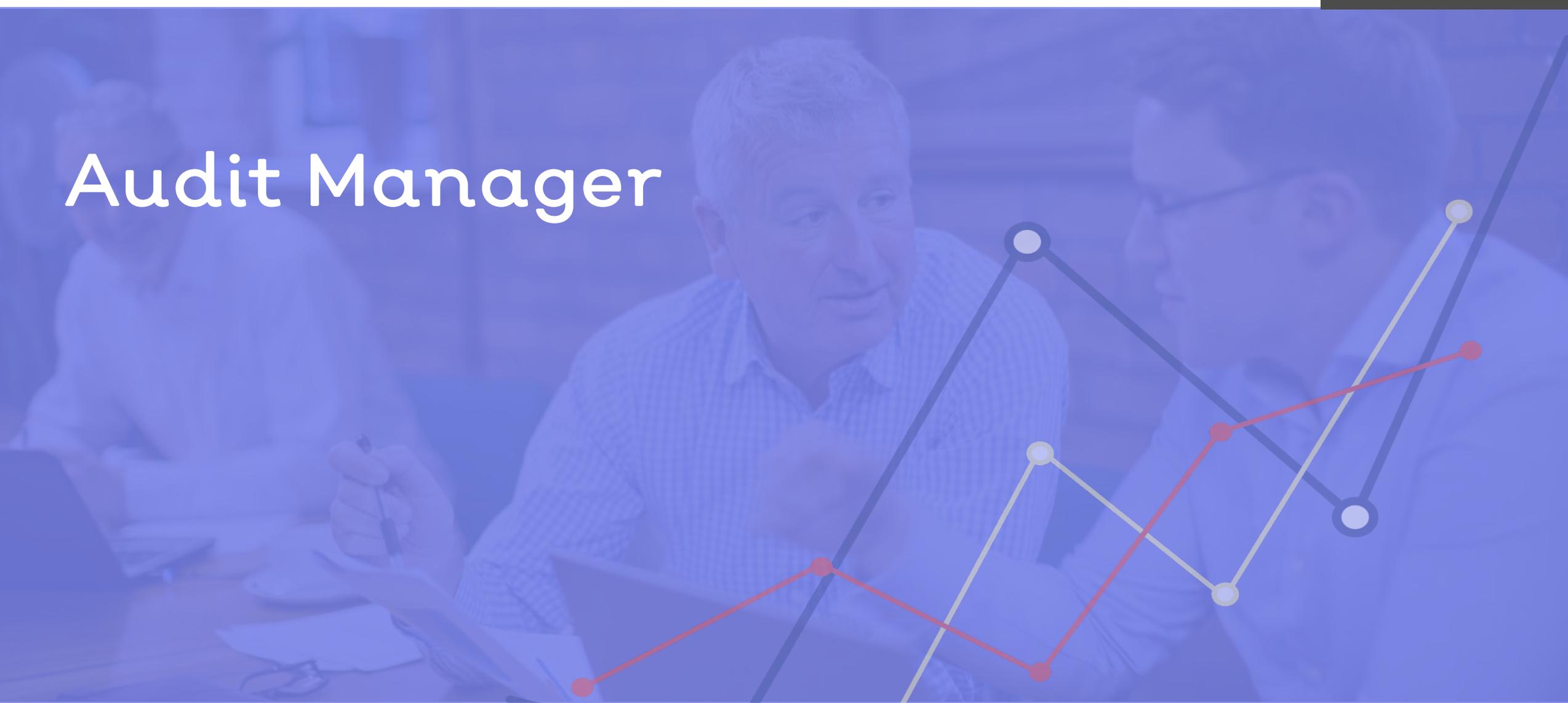


EQMS Quick Start Guide



Audit Manager



What do you need help with?

- [My Audits list →](#)
- [My Scheduled Audits →](#)
- [Audit Schedule →](#)
- [Audit Details →](#)
- [Audit Questionnaire →](#)

My Audits list

Here you will find a list of Audits that you currently own. A variety of filters are available to easily direct you to the information you require.

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

To Do
Access your EQMS To Do List

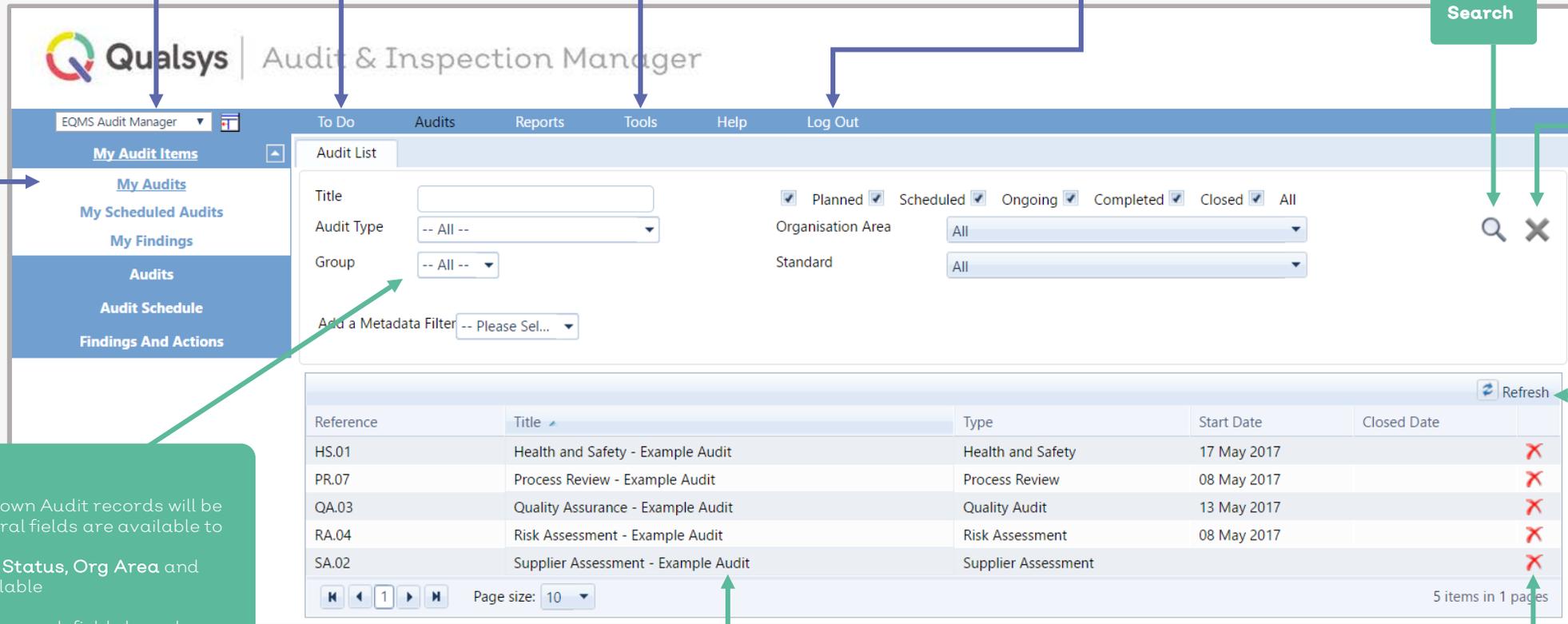
Tools
Access Access your User Details screen

Log Out
Sign out and exit EQMS

Audits Navigation
Access different areas of the Audit tab by selecting from the list. **My Audit Items** will expand when first selected to reveal your own Audits, Schedule and Findings. Below this are the standard Audit, Schedule and Findings screens that give module wide data where permitted

Submit Search

Clear Fields



The screenshot shows the 'Audit List' section of the Qualsys Audit & Inspection Manager. It includes a navigation menu on the left with options like 'My Audit Items', 'My Audits', 'My Scheduled Audits', 'My Findings', 'Audits', 'Audit Schedule', and 'Findings And Actions'. The main area contains filter fields for Title, Audit Type, Group, Organisation Area, Standard, and Status (Planned, Scheduled, Ongoing, Completed, Closed). A table below displays audit records with columns for Reference, Title, Type, Start Date, and Closed Date. A 'Refresh' button is located at the bottom right of the table area.

Reference	Title	Type	Start Date	Closed Date
HS.01	Health and Safety - Example Audit	Health and Safety	17 May 2017	
PR.07	Process Review - Example Audit	Process Review	08 May 2017	
QA.03	Quality Assurance - Example Audit	Quality Audit	13 May 2017	
RA.04	Risk Assessment - Example Audit	Risk Assessment	08 May 2017	
SA.02	Supplier Assessment - Example Audit	Supplier Assessment		

List Filters
As a standard user, your own Audit records will be displayed in the list. Several fields are available to help you filter the results. **Title, Audit Type, Group, Status, Org Area and Standard** filters are available

Also, you can add custom search fields based on General Metadata by selecting from the 'Add a Metadata Filter' list

Refresh Results

My Audits List
A list of matching Audit Records which **you currently own** will be displayed. Selecting an Audit from the list will reveal the **Audit Details** screen.

Remove Audits
If an Audit has not yet started, you will see the red delete icon in the row of the Audit. Selecting this icon will remove the record. You will be prompted to confirm this action.

My Scheduled Audits

Here you will find a list of your Audits that are currently Scheduled, organised by Audits Overdue, Scheduled in the next 7 Days, the next month and those scheduled even further on.



The screenshot shows the Qualsys Audit & Inspection Manager interface. The top navigation bar includes 'EQMS Audit Manager', 'To Do', 'Audits', 'Reports', 'Tools', 'Help', and 'Log Out'. The left sidebar contains 'My Audit Items', 'My Audits', 'My Scheduled Audits', 'My Findings', 'Audits', 'Audit Schedule', and 'Findings And Actions'. The main content area displays a table of scheduled audits with columns for Audit Ref, Audit Title, Audit Type, Site, and Due to Start. The table is organized into sections: Overdue, Scheduled within next 7 days, Scheduled within next Month, and Scheduled Later. Each audit row has three icons: a person with a checkmark, a document, and a spreadsheet. Callout boxes point to these icons: 'Start Audit' (Updates Audit Status to Ongoing), 'Export Audit as Microsoft Word file', and 'Export Audit as Microsoft Excel File'.

Audit Ref	Audit Title	Audit Type	Site	Due to Start			
Overdue							
SA.02	Supplier Assessment - Example Audit	Supplier Assessment		05 May 2017			
Scheduled within next 7 days							
QA.03	Quality Assurance - Example Audit	Quality Audit		13 May 2017			
Scheduled within next Month							
HS.01	Health and Safety - Example Audit	Health and Safety		17 May 2017			
Scheduled Later							
You do not have any scheduled audits in this section.							

My Scheduled Audits List
A list of currently scheduled Audit Records which you are currently assigned as an Auditor will be displayed. Selecting an Audit from the list will reveal the Audit Details screen. Each section (Overdue, Next 7 Days, Next Month, Later) can be collapsed or expanded in order to help better organise your view of the schedule.

Audit Schedule

Here you will find a calendar/timeline of Audits that are currently Scheduled. Selecting an Audit will reveal the Audit Details screen.

Filters

Several fields are available to help you filter the results. Status, Audit Type, Standards, Org Area, Audit Owner and From Date filters are available

Tabs

When Audits are accessed via the Schedule, they will appear as tabs along this top bar

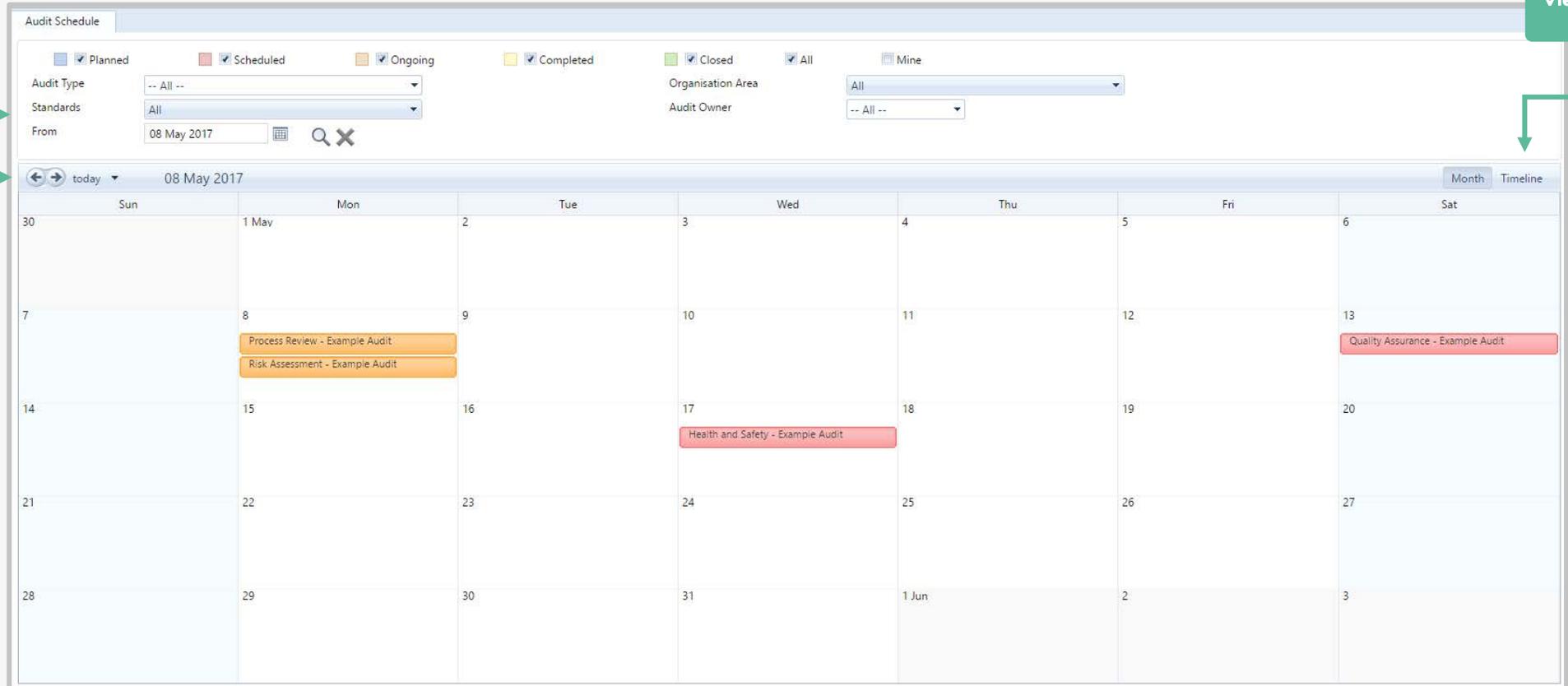
Swap to
Timeline
View

Month Selection

Use the arrows to move back and forwards through the calendar by month.

Statuses Key

- Planned
- Scheduled
- Ongoing
- Completed
- Closed



The screenshot shows the 'Audit Schedule' interface. At the top, there are filter tabs for 'Planned', 'Scheduled', 'Ongoing', 'Completed', and 'Closed'. Below these are dropdown menus for 'Audit Type', 'Standards', 'From' (with a date picker set to '08 May 2017'), 'Organisation Area', and 'Audit Owner'. The main area is a calendar grid for May 2017, with a 'Month' and 'Timeline' view selector at the top right. The calendar shows several audit events: 'Process Review - Example Audit' and 'Risk Assessment - Example Audit' (orange tabs), 'Quality Assurance - Example Audit' (red tab), and 'Health and Safety - Example Audit' (red tab). Navigation arrows are visible at the top left of the calendar grid.

Audit Details

When accessing an Audit Record, you will first be greeted with the Audit Details screen. From here, you can view the Details, Associations, Questionnaire and Findings.

Audit Details

The main section of this screen will display the Audit Details including the **Type, Owner, Status, Related Dates** and **Scope**

Any areas marked with a red * are mandatory fields and must be filled in.

Associated Items

This tab appears below the details form. You will see any **Organisation Areas, Standards, Documents, Risks** or **Issues** associated with the Audit. Each area will expand to reveal the full list of associated items by selecting the expand icon to the right of the header.

Auditors and Viewers

This tab will allow you to view the Audit Team (users involved with the Audit Process) and Audit Viewers (users with read only access)

Audit Scores

This tab will allow you to view the results from the Audit including the amount of Non Conformances raised

Questionnaire Tab
Select this tab to access the Audit Checklist(s)

Findings Tab
Select this tab to access any Findings that may have been raised in relation to this Audit

Export
Audits can be exported as both Word and Excel files

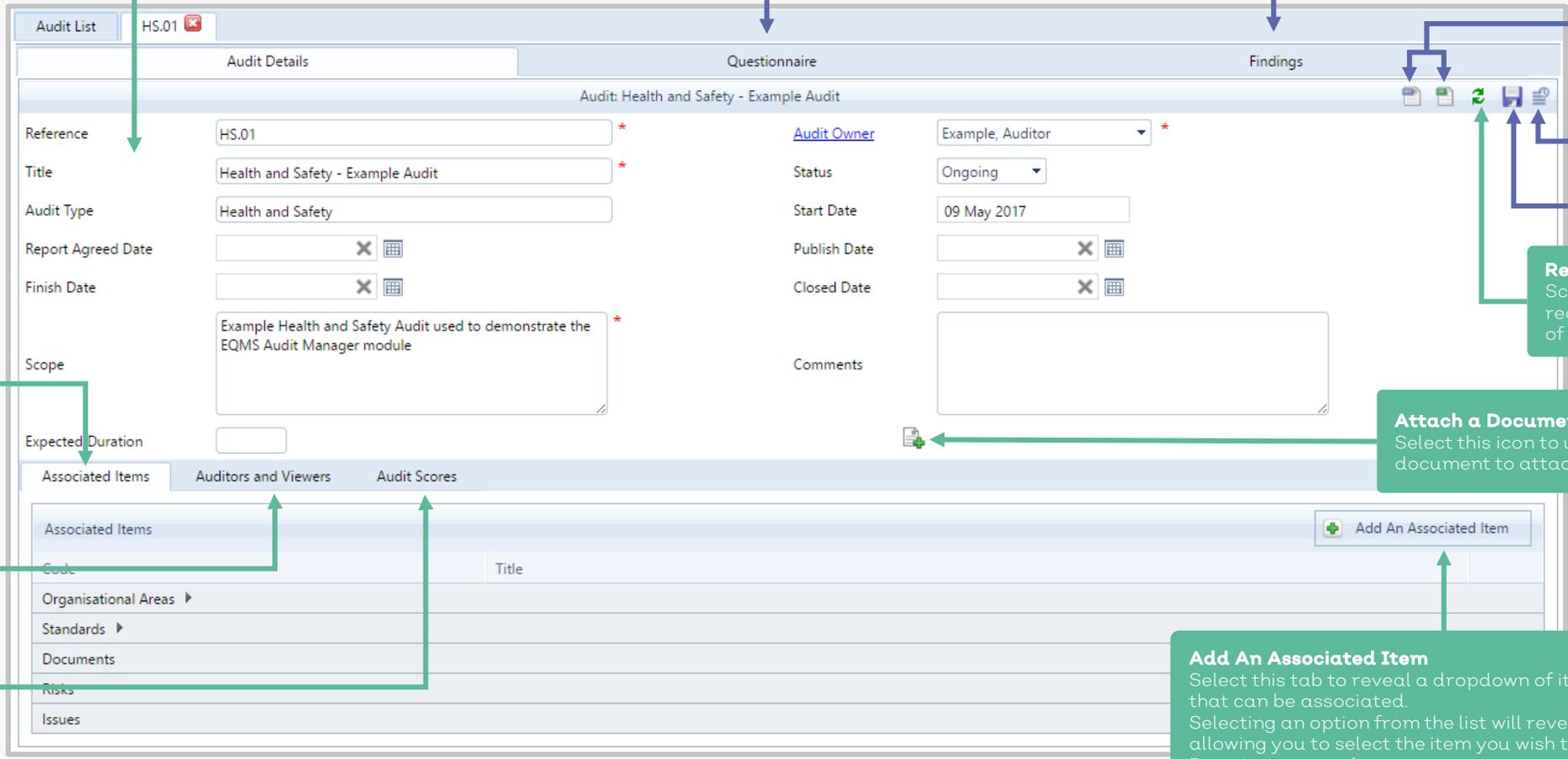
Audit Trail

Save

Recurring Audit
Schedule a recurrent version of this Audit

Attach a Document
Select this icon to upload a new document to attach to the Audit

Add An Associated Item
Select this tab to reveal a dropdown of item types that can be associated. Selecting an option from the list will reveal a window allowing you to select the item you wish to associate. **Permissions apply**

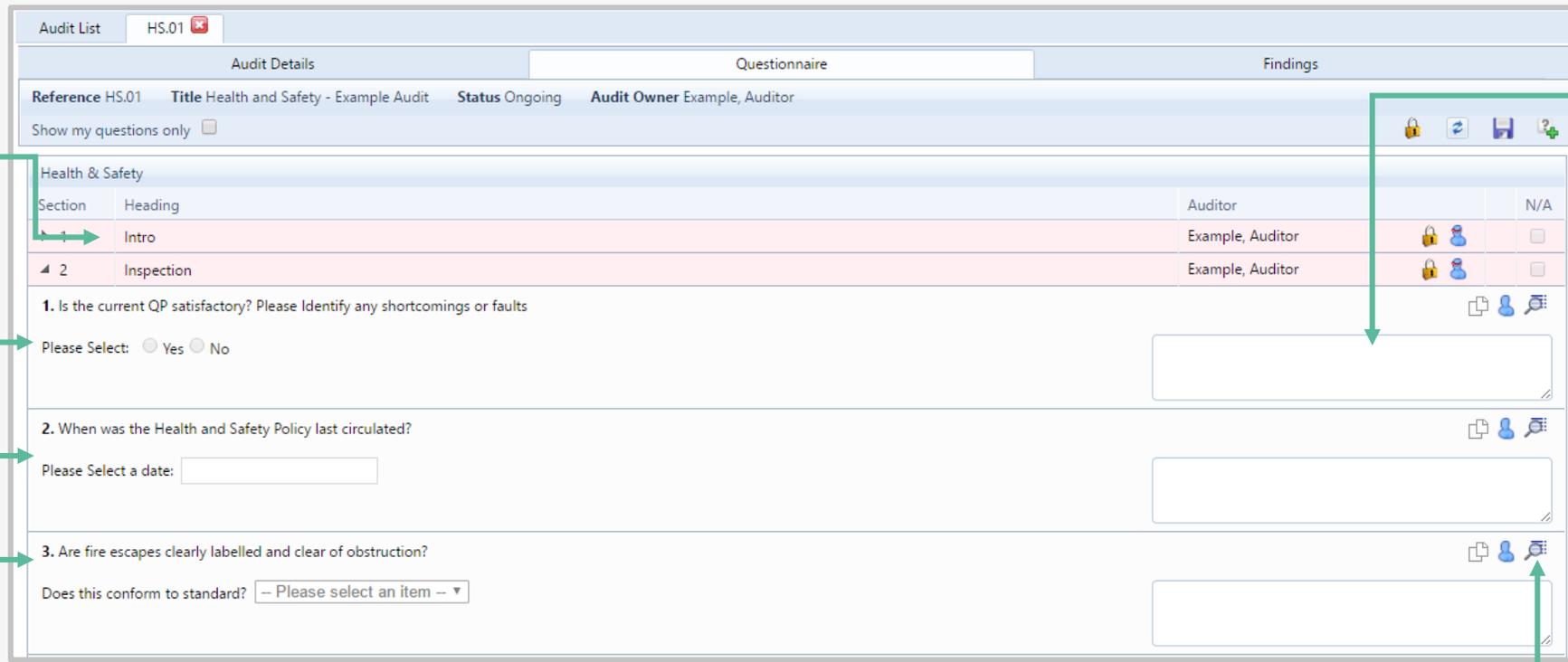


The screenshot shows the 'Audit Details' form for audit 'HS.01'. The form is divided into two main sections: 'Audit Details' and 'Questionnaire'. The 'Audit Details' section includes fields for Reference (HS.01), Title (Health and Safety - Example Audit), Audit Type (Health and Safety), Report Agreed Date, Finish Date, Scope (Example Health and Safety Audit used to demonstrate the EQMS Audit Manager module), Expected Duration, and Audit Owner (Example, Auditor). The 'Questionnaire' section includes Status (Ongoing), Start Date (09 May 2017), Publish Date, Closed Date, and Comments. Below the form are tabs for 'Associated Items', 'Auditors and Viewers', and 'Audit Scores'. The 'Associated Items' tab is expanded, showing a list of categories: Associated Items, Code, Organisational Areas, Standards, Documents, Risks, and Issues. A '+ Add An Associated Item' button is visible in the top right of the expanded list.

Audit Questionnaire

The questionnaire shows the Checklist(s) associated with the Audit. (The example show is a Questionnaire that has been released to Auditors but has not yet been checked-out).

Section Headers
Each checklist may be split into multiple sections. Each section can be collapsed or expanded to reveal the questions within



The screenshot shows the 'Questionnaire' tab of an audit interface. At the top, it displays 'Audit List' with 'HS.01' and a red error icon. Below this are tabs for 'Audit Details', 'Questionnaire', and 'Findings'. The 'Questionnaire' tab is active, showing a table with columns for 'Reference', 'Title', 'Status', and 'Audit Owner'. Below the table, there are three questions with various input fields and icons for actions like 'Check-Out', 'Check-In', 'Refresh Records', 'Save Record', 'Associate Question', 'Show associated Info', 'Add Auditee', 'Show Finding(s)', 'Raise Finding', 'Release to Audit Team', and 'Validate Questionnaire'.

Reference	Title	Status	Audit Owner
HS.01	Health and Safety - Example Audit	Ongoing	Example, Auditor

Section	Heading	Auditor	N/A
	Intro	Example, Auditor	
2	Inspection	Example, Auditor	

1. Is the current QP satisfactory? Please Identify any shortcomings or faults

Please Select: Yes No

2. When was the Health and Safety Policy last circulated?

Please Select a date:

3. Are fire escapes clearly labelled and clear of obstruction?

Does this conform to standard?

Comments Field
Each question in a checklist comes with a comment field as default. Depending on the configuration, you may find that the field is mandatory

Answers
To begin to fill in the question responses, you must first **check-out** your checklists. Once checked out, you will be free to answer your questions. The answers will vary depending on the metadata type used. These can be **date**, **dropdown**, **text field**, **integer(numeric) field** or **radio buttons**

Findings
To raise and action a finding, select the **Raise Finding** icon .

Throughout the process of an Audit you may need to raise findings. Often, you may find that the answers to the question may automatically trigger a non-conformance or observation based on the answers 'weight'

- Icons**
-  Check-Out
 -  Check-In
 -  Refresh Records
 -  Save Record
 -  Associate Question
 -  Show associated Info
 -  Add Auditee
 -  Show Finding(s)
 -  Raise Finding
 -  Release to Audit Team
 -  Validate Questionnaire

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