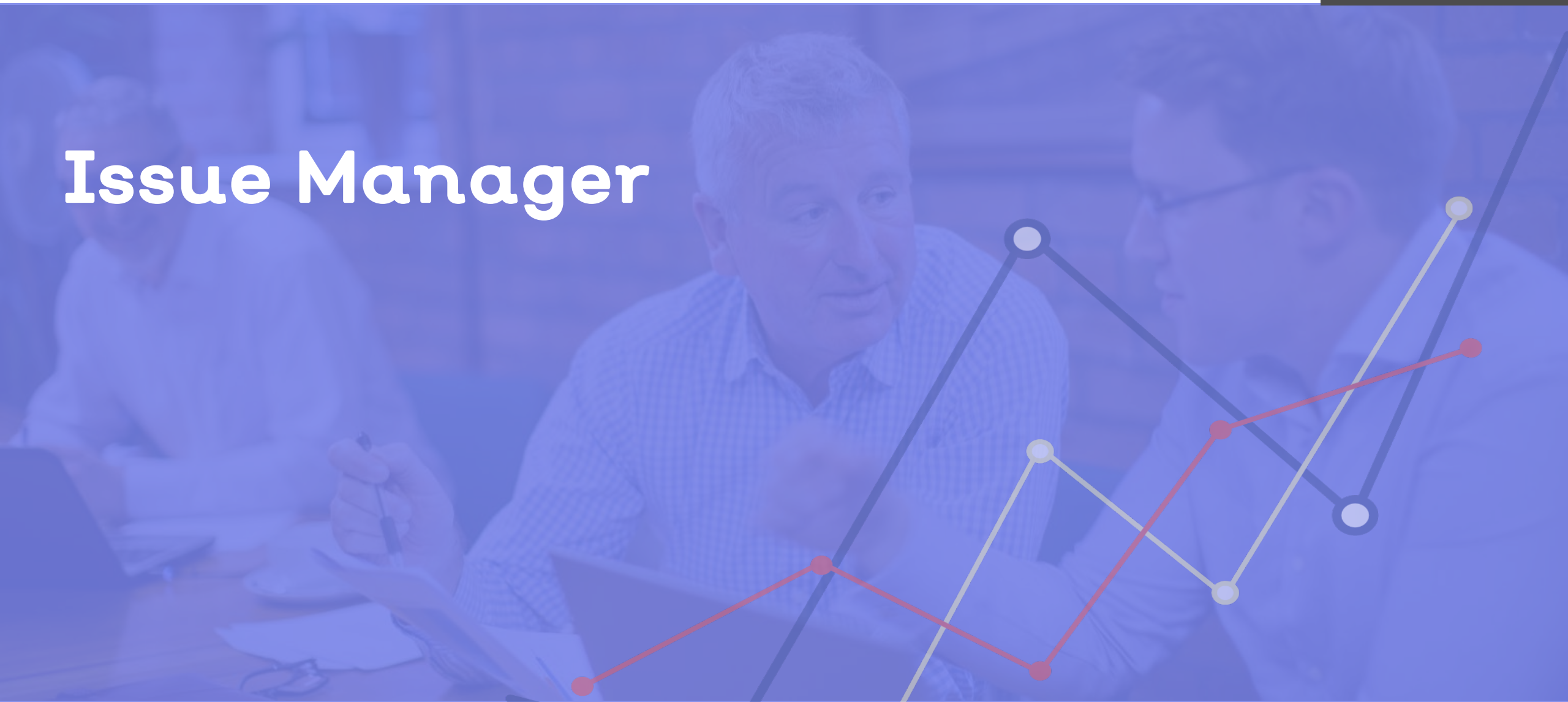


EQMS Quick Start Guide



Issue Manager



What do you need help with?

- [Issues list →](#)
- [Issue Details →](#)
- [My Actions Screen →](#)

Issues list

The EQMS Issue Manager Issue List gives you access to all of the Issues that you have permission to view.



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

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

Issue Navigation
Access other areas of the module.

Users should have access to **New Issues** and the **Issues List** *

Managers can access reports, **Contacts / Companies**, **Reports**, **Types** and **Workflow**

Only **Admins** can access the **Issue Admin** area.

Issue Manager

My Actions

New Issue

Issues

Contacts/Companies

Reports

Issue Types

Issue Admin

Workflow

Issues

Issue ID Company Contact Status

Issue Type Lifecycle Handling Product

Keywords

Organisational Area ☐ Include Sub-Levels

☐ Mine ☐ Favourites ☐ Recent ☐ Urgent

Submit Search

Clear Fields

Report Results

Add Search Criteria

You have not selected any metadata filters

Search Panel

Several fields are available to help you filter the results.

ID, Company, Contact, Status, Issue Type, Lifecycle, User Handling, Product, Keywords and Organisational Areas are available to be used alone or in conjunction with one another.

Additionally, checkboxes to filter to Issues you Handle (Mine), Favourites, Recent and Urgent are available

Issues List

A list of Issues that match the search criteria (and the current user has permission to view) will be displayed here. Issues past their **Follow Up** date will appear in **RED**. Selecting an Issue from the list will reveal the Issue Details screen.

Issue ID	Date Raised	Company	Title	Follow Up	Status	Issue Handler	Fav
7	04 Apr 2017	Company C	Damaged goods received	19 May 2017	In Progress	Issue User	<input checked="" type="checkbox"/>
6	04 Apr 2017	Company C	Company C NCR - Product 2 Out of Tolerance	18 May 2017	With Customer	Issue Admin	<input type="checkbox"/>
5	29 Mar 2017	Company B	Company B - Issue with Service 1	12 Apr 2017	With Customer	Issue Admin	<input type="checkbox"/>
4	29 Mar 2017	Internal	Audit NCR - QP09 - Suitable Evidence unavailable	13 Jun 2017	Acknowledged	Issue Admin	<input type="checkbox"/>
3	16 Mar 2017	Internal	Required Task	20 Mar 2017	Cleared	Issue User	<input type="checkbox"/>
2	07 Apr 2017	Internal	QP12 - New Procedure Approval	24 May 2017	In Progress	Issue Admin	<input type="checkbox"/>
1	07 Apr 2017	Company A	Company A NCR - Product 1	14 Apr 2017	Cleared	Issue Admin	<input type="checkbox"/>

Add Search Criteria

Add additional fields to the search panel by selecting them from the Dropdown list. These fields are defined by the modules custom Metadata (user defined fields)

Issue Details

The Issue Details screen is where all information and data for a specific Issue is captured. Tabs listed along the top allow you to access additional associated data and information.



Journals List
A history of changes and additional comments

Documents
Associated Docs

Workflow
View Change Path and Progress

Organisational Areas
Associated Org Areas

Privacy
View/Apply privacy settings to Issue

Associated Items
View/Associate items from other EQMS modules

Save Details

Refresh Screen

Issue Details Journals List Documents Workflow Organisational Areas Privacy Associated Items

Issue Details

Issue ID

2

Date In

07 Apr 2017

Issue Type

Change Control

Company

Internal

Input By

Issue Admin

Lifecycle

Standard

Title

QP12 - New Procedure Approval

Detail

Example Issue demonstrating additional uses of EQMS Issue Manager

Expand

Target Date

31 May 2017

Follow Up

24 May 2017

Passed To

Admin, Issue

Date Cleared

Progress

Expand

Status

In Progress

Source

Meeting

Priority

High

Issue Type
Select the hyperlink (underlined in blue) to reveal additional details for the Issue Type

Company/Contacts
Select the hyperlink (underlined in blue) to reveal additional details for the Company and/or Contact

Comments
When amending certain details (Dates, Passed To and Status) the system will prompt you to also leave a comment. This will form part of the Journal List

Add Favourite

Audit Trail

My Actions Screen

The EQMS Issue Manager My Actions screen is an additional To-Do list that relates directly to Issue Manager. While visually similar to the Issues List, the My Actions screen displays actions, not Issues.



Search Panel

As with the Issues List, several fields are available to help you filter the results.

ID, Company, Contact, Status, Issue Type, Lifecycle, User Handling, Product, Keywords and Organisational Areas are available to be used alone or in conjunction with one another.

Additionally, checkboxes to filter to Issues you Handle (Mine), Favourites, Recent and Urgent are available

Actions List

A list of your Actions that match the search criteria will be displayed here. Actions past their Due Date will appear in **RED**. Selecting an Action from the list will reveal the pop-up Action Details window.

My Actions

Issue ID

Company

Contact

Status

--- All ---

Issue Type

--- All ---

Lifecycle

--- All ---

Handling

--- All ---

Product

--- All ---

Keywords

Mine

Favourites

Recent

Urgent

Organisational Area

--- All ---

Include Sub-Levels

Submit Search

Clear Fields

Add Search Criteria

--- Please Select ---

You have not selected any metadata filters

Issue ID	Date Due	Date Raised	Action Title	Action Description	Status	Priority
7	07 Apr 2017	04 Apr 2017 00:00	Investigate Root Cause	Please investigate the root cause of the Issue	In Progress	Low
6	14 May 2017	04 Apr 2017 00:00	Corrective Actions	Please take the required corrective actions to rectify the Issue	With Customer	Low
6	14 May 2017	04 Apr 2017 00:00	Preventative Actions	Please put procedures or other measures in place to help prevent the same issue re-occurring	With Customer	High
4	08 May 2017	29 Mar 2017 00:00	Customer Credit	If Required (see data field on Issue Details screen), credit the customer with the required amount.	Acknowledged	Low

Add Search Criteria

Add additional fields to the search panel by selecting them from the Dropdown list. These fields are defined by the modules custom Metadata (user defined fields)

NOTE: The My Actions screen may be disabled by Issue Administrators

Aizlewood's Mill,
Nursery Street,
Sheffield
S3 8GG

 +44 114 282 3338

 info@qualsys.co.uk

