

# EQMS Quick Start Guide



## Navigator

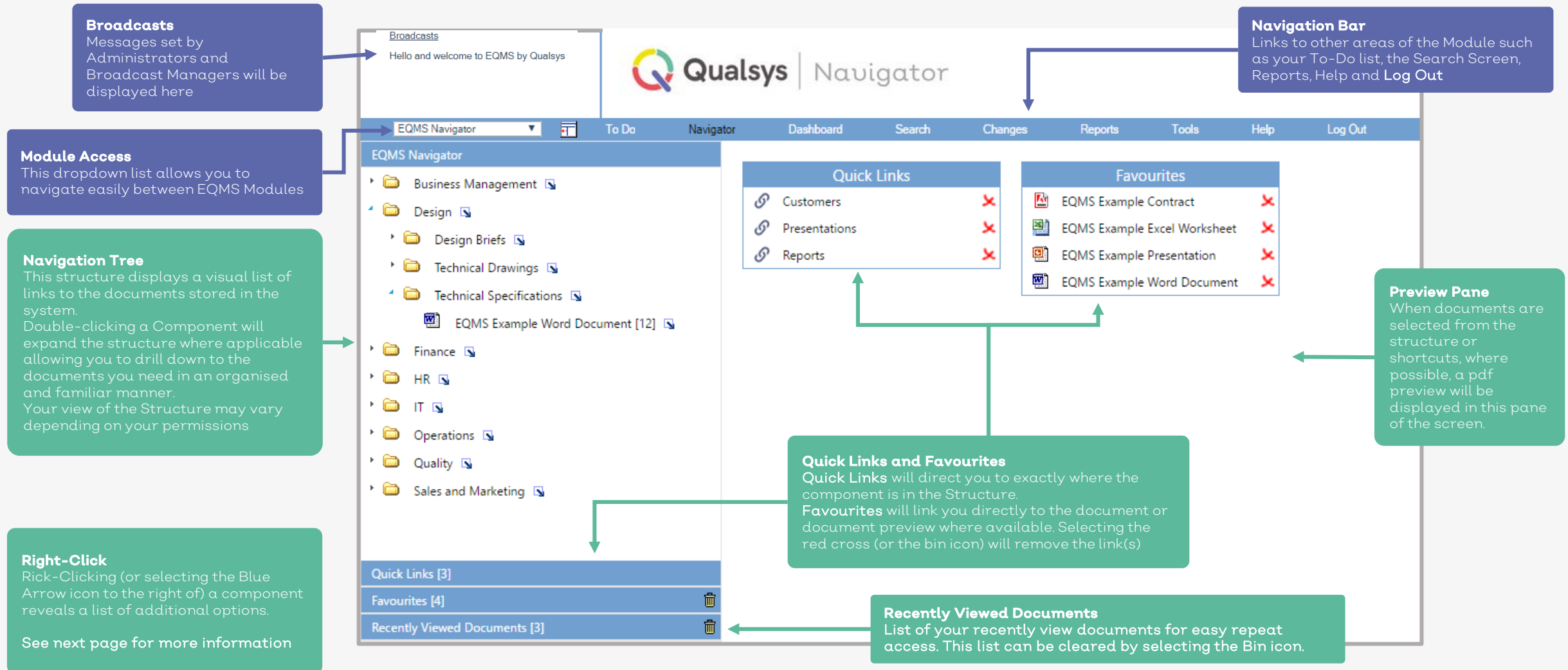


# What do you need help with?


- [EQMS Navigator →](#)
- [Context Menu →](#)
- [Search Screen →](#)
- [To Do List →](#)

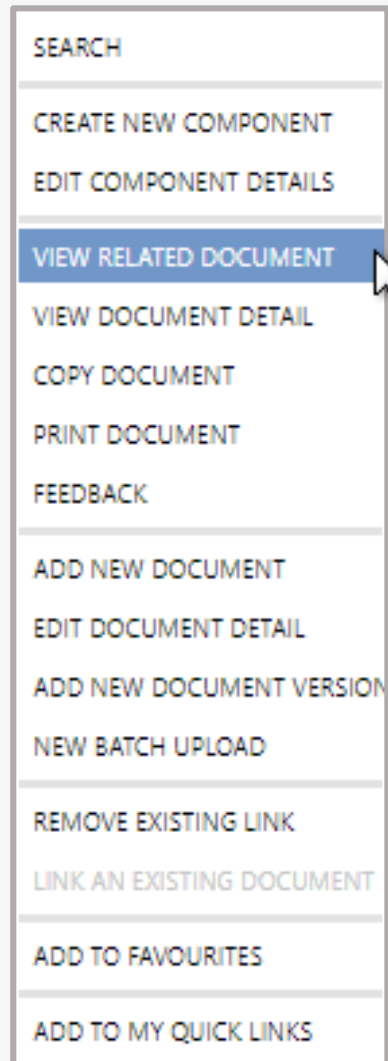
# EQMS Navigator

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.



# Context Menu

Rick-Clicking (or selecting the Blue Arrow icon ) a component reveals a list of additional options. The options available to you will vary depending on the component and/or your permissions. Unavailable options will appear greyed out.



**Search** – Bring up the structure search window and search within the selected component

**Create New Component** – Create a New Component below the selected component

**Edit Component Details** – Reveal the editable details screen for the selected component

**View Related Document** – Reveal the document in the preview window where available (Certain documents can not be displayed as pdf preview)

**View Document Detail** – Reveal the document details screen

**Copy Document** – Create a local copy of the selected Document

**Print Document** – Print a copy of the selected Document

**Feedback** – Provide feedback for the Document Owner. A related item will also appear in your To-Do list till the owner responds

**Add New Document** – Upload a new document to the selected location in the Navigation structure

**Edit Document Detail** – Reveal the editable details screen for the selected document

**Add New Document Version** – Upload a new version of the selected document. You must provide a new document version number.

**New Batch Upload** – Upload a batch of documents below the selected component

**Remove Existing Link** – Remove an active link to an EQMS document. This does not remove the component

**Link An Existing Document** – Link an existing EQMS document to this location in the structure

**Add To Favourites** – Add the documents to your favourites

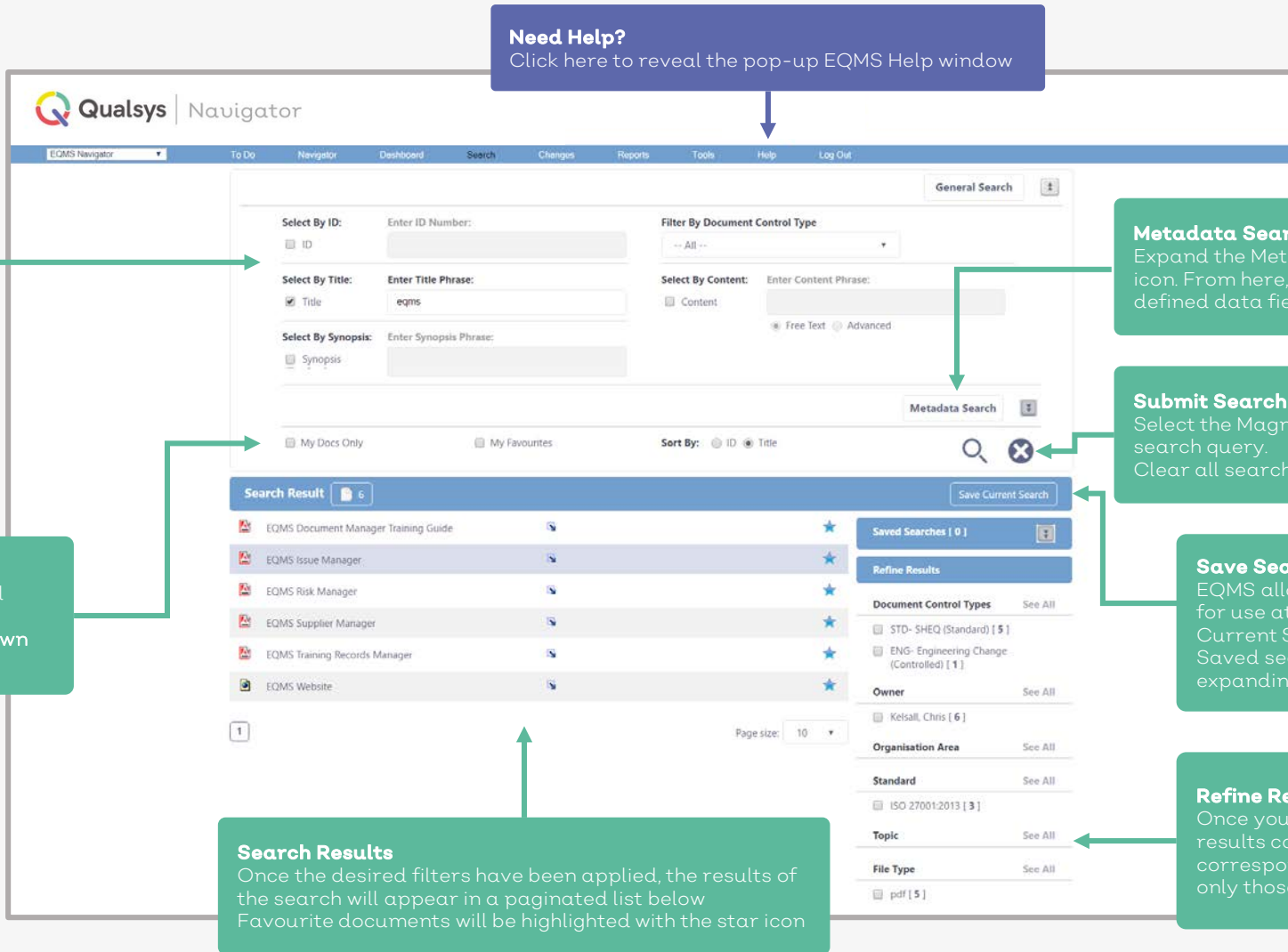
**Add To My Quick Links** – Add a link to the component to your Quick Links

## Document or Component

The context menu will have more options available for a document than it will a (folder) component. Any options not available will appear greyed out

# 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.



**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, Title, Synopsis, Document Control Type and Content filters are available to be used alone or in conjunction with one another

**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

**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

**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**

**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

**Search Interface Details:**

- Header:** Qualsys | Navigator
- Navigation Bar:** EQMS Navigator, To Do, Navigator, Dashboard, Search, Changes, Reports, Tools, Help, Log Out
- Search Fields:**
  - Select By ID:** Enter ID Number: [Text Box]
  - Select By Title:** Enter Title Phrase: [Text Box] (Title checkbox checked)
  - Select By Synopsis:** Enter Synopsis Phrase: [Text Box] (Synopsis checkbox unchecked)
  - Filter By Document Control Type:** [Dropdown: -- All --]
  - Select By Content:** Enter Content Phrase: [Text Box] (Content checkbox checked)
  - Content Filter:** Free Text (selected), Advanced
- Buttons:** My Docs Only, My Favourites, Sort By: ID, Title, Search (Magnifying Glass), Clear (Cross), Metadata Search (Expand), Save Current Search
- Search Results:**
  - Search Result [6]
  - Table of results with document icons, titles, and star icons for favourites.
  - Page size: 10
- Refinement Panel:**
  - Saved Searches [0]
  - Refine Results
  - Document Control Types: STD- SHEQ (Standard) [5], ENG- Engineering Change (Controlled) [1]
  - Owner: Kelsall, Chris [6]
  - Organisation Area: [See All]
  - Standard: ISO 27001:2013 [3]
  - Topic: [See All]
  - File Type: pdf [5]

# To Do List

The EQMS To Do list allows users to keep track of their notifications and required actions throughout the system in one place. If you have items in your To Do list, you will be directed straight to this screen when you log into the EQMS system.



## New Reminder

Want to set a reminder outside of the standard actions and notifications? Select the **New Reminder** link to create a custom To Do list item

## Sidebar Menu

Limit the To Do list to only match the criteria selected. Incoming, Outgoing, Notifications and Reminders

## Notification Icons

Each notification type has a relevant icon to help you distinguish between them.



Reminders



Notification



Acknowledgement

## Request/Action

If an exclamation mark appears next to the icon, this indicates that the action is required urgently

The screenshot shows the EQMS Navigator interface. The top navigation bar includes links for To Do, Navigator, Dashboard, Search, Changes, Reports, Tools, Help, and Log Out. The 'To Do' section is active, showing a list of items under the heading 'All To Do Items'. The list is organized into three sections: EQMS Document Manager, EQMS Change Manager, and Personal Reminders. Each item in the list includes a date, a description, and a 'Preview' icon (a document with a magnifying glass). Annotations with green arrows point to various features: 'New Reminder' link, 'Group By Module' checkbox, 'Preview' checkbox, 'Type', 'Created', 'Details', and 'Date Due' column headers, and the 'Preview' icon in the list items. A blue box on the left highlights the 'All To Do Items' link in the sidebar menu. A blue box at the bottom left explains the notification icons and the 'Request/Action' status. A green box at the bottom right explains how to remove notifications and reminders.

**EQMS Document Manager**

Type	Created	Details	Date Due
Document	26 Apr 2017	The Following Document Is Available: 2 - EQMS Example Contract	
Document	26 Apr 2017	The Following Document Is Available: 8 - EQMS Example Report	
Document	26 Apr 2017	The Following Document Is Available: 12 - EQMS Example Word Document	

**EQMS Change Manager**

Type	Created	Details	Date Due
Issue	26 Apr 2017	Issue 1: Example - Example Action From An Issue	28 Apr 2017

**Personal Reminders**

Type	Created	Details	Date Due
Reminder	26 Apr 2017	Example Reminder	10 May 2017

## Filters and Checkboxes

Check the **Group By Module** checkbox to rearrange your To Do list to be organised via the Module they originate from

Check the **Preview** checkbox to expand all To Do list entries and reveal additional details

Each of the column headers **Type**, **Created**, **Details** and **Date Due** can be selected to filter the list in ascending or descending order using that column

## Document Previews

For Document Notifications and Acknowledgement Requests, the related document is viewable from the To Do list by selecting the Preview Icon to the right of the row

## Remove Notifications

Where possible (Actions and Acknowledgements must be acted upon) you can remove notifications and reminders from the list by either selecting the remove icon, or checking multiple checkboxes and selecting remove from the column header



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

 +44 114 282 3338

 [info@qualsys.co.uk](mailto:info@qualsys.co.uk)

