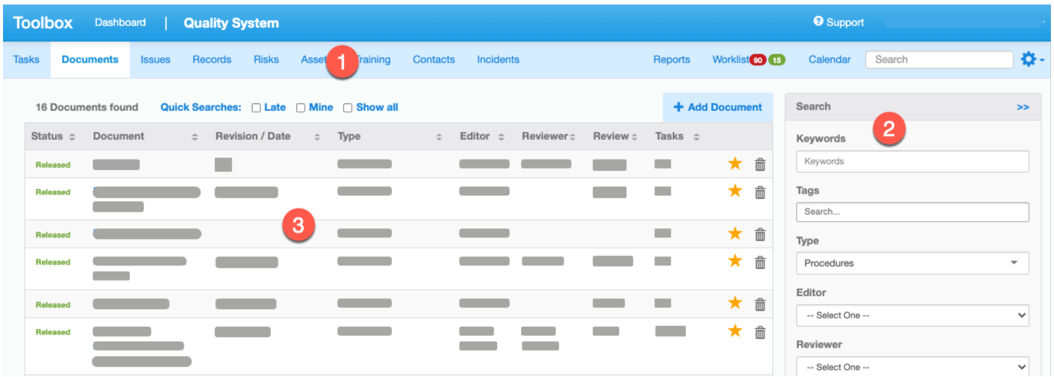
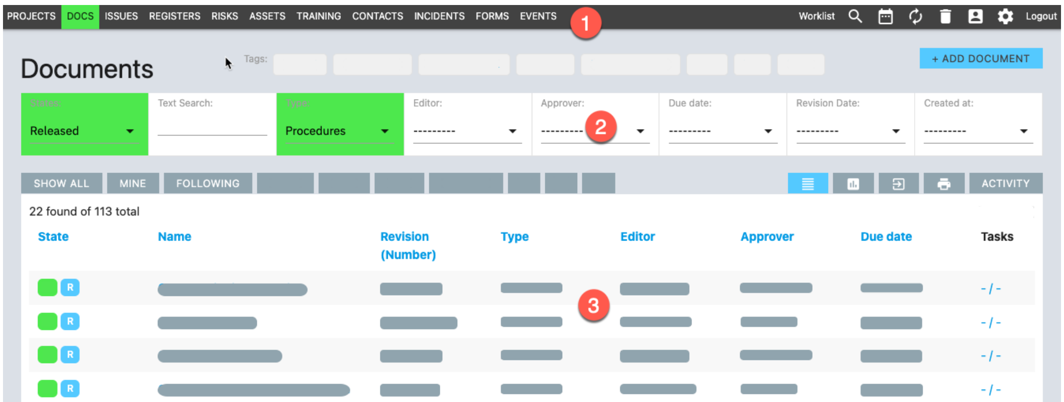
Quality Systems Toolbox - upgrade from version 2 to version 3.

This document has information about some of the changes and what you can expect to see in the new version.

General

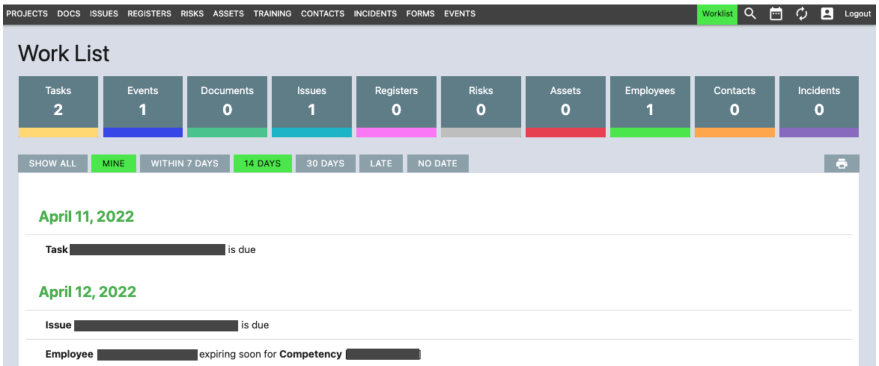
The overall structure is much the same, with modules for Documents, Issues, Assets, Training, etc. shown at the top of the screen (1). Each module still has search options (2), with the results shown in a register or list (3).



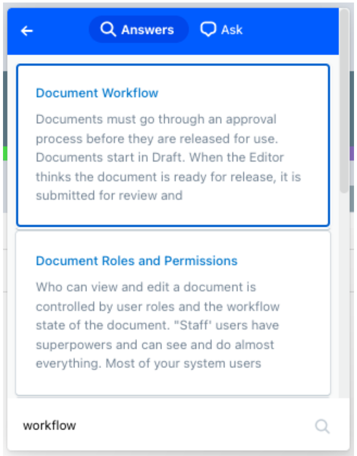


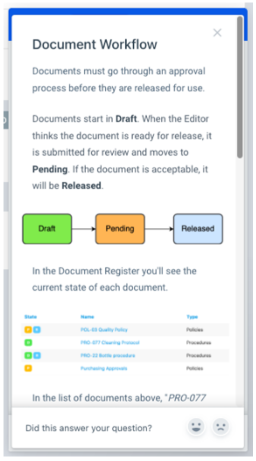
- Rather than everyone logging in at 'toolbox.qualitysystems.com', each customer has their own URL, e.g. mysite.qualitysystems.com
- Edit content via an "edit" mode for everything all at once,  rather than a pencil edit icon per field. 
- "Delete" is a recycle bin and content can be easily rescued. 
- "Subscribers" are now "Followers" and instead of using the star,  you  /  content to receive update notifications, and you can use the search tab to quickly see your followed content:

When you log in, you go directly to your Work List. It can be filtered by type using the summary boxes up the top, and by date using the tabs.

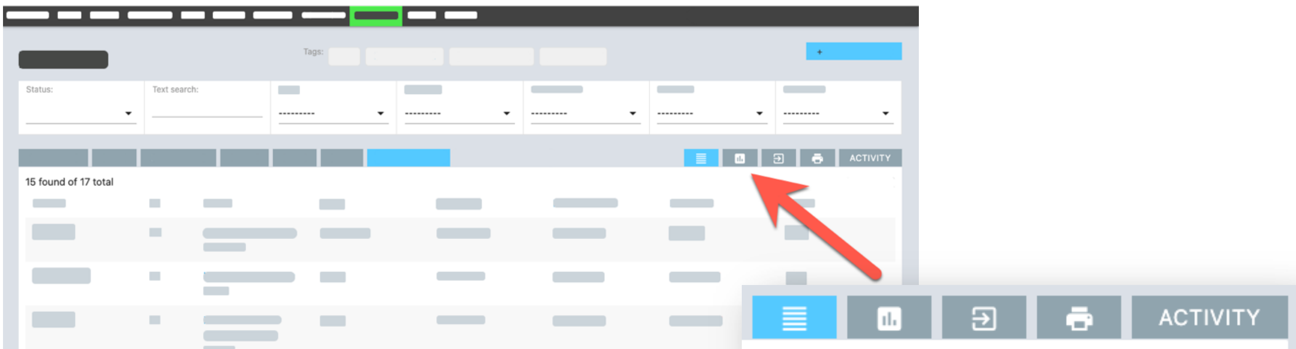


In v3, support content can be accessed via the "?"at the bottom right which opens a popup window. Search and view the article without leaving Toolbox (or click on the title to see it full screen).





Reports, exports match the search results - just switch to an different view tab:



Plus:

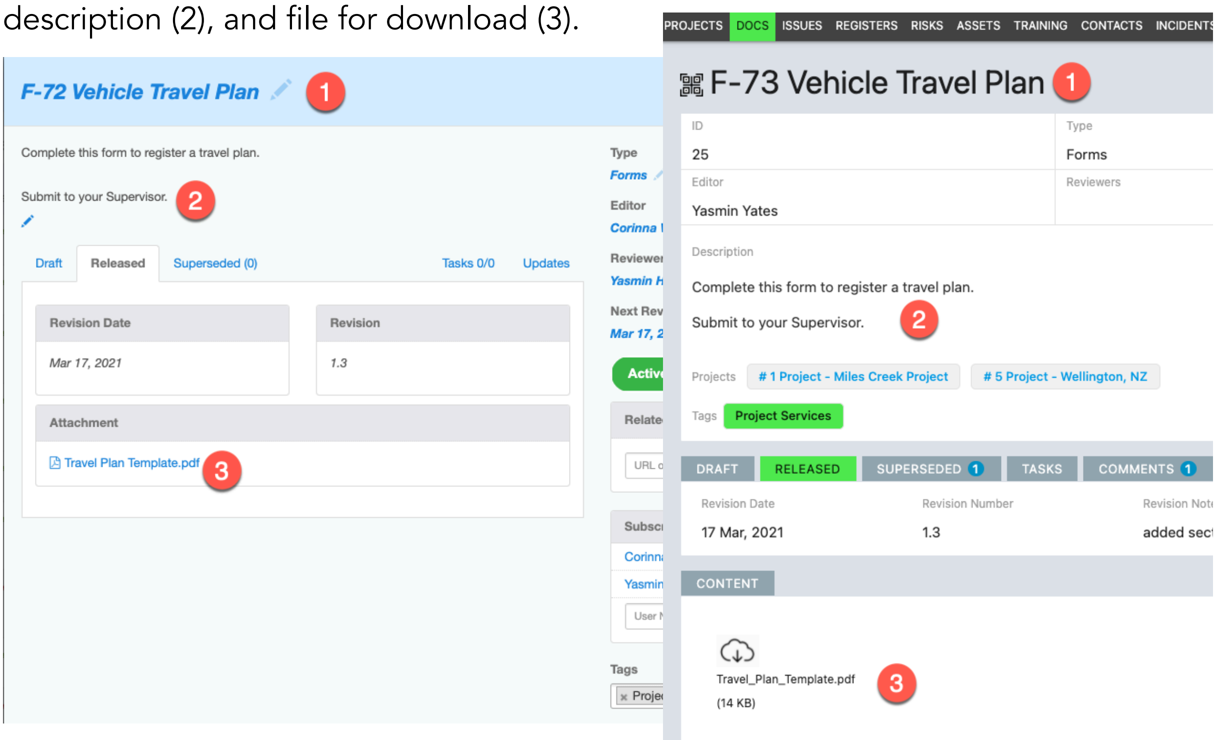
- Saved 'collections' A, B, C to quickly access your favourite items
- System "Activity" tracking - filter by: item, module, user, followed, timeframe, all.
- Bulk edit to apply/remove tags, update assignee, add training records.
- QR codes for easy access to key information

Documents Module

Same as before, you can upload files or create documents directly in QST.

The document workflow is the same: *Draft > Pending > Released > Superseded*.

Here's the same document in V2 and V3, and it's easy to match up the title (1), description (2), and file for download (3).

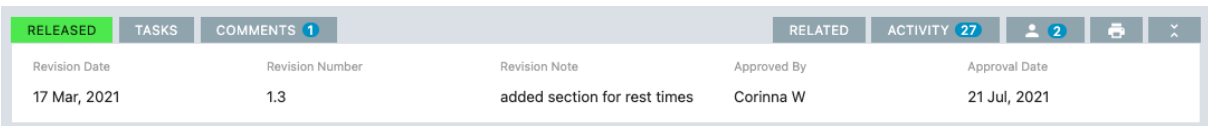


For clients who want to release a non-editable file (e.g. pdf) but still control the working document (e.g. docx), you can store 2 files on each controlled Document in v3. This means there's no need to double up listings for the same document.

There's a new 'reviewers' role for documents, in addition to editor and approver:

- 'editor' - makes changes
- 'approver' - releases a new version
- 'reviewers' - (multiple) can preview the draft/pending version

The Revision note is attached to the version, and separate from general comments.

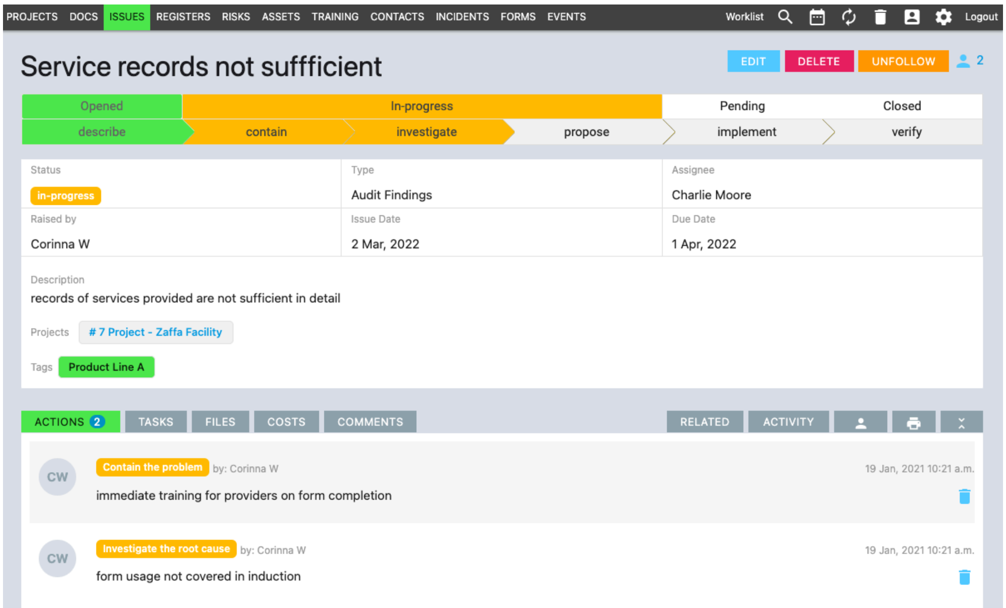


Search will match text within the attached file of the released document (for text based files like Excel, docx, pdf)

Issues

Issues in version 3 is very similar. It has same corrective action workflow (describe, contain, investigate, etc) but now Status (open, in-progress, etc.) is changed independently to Actions, so it's easy to reopen an Issue that was closed in error.

The Issue now has an overall description field that can be edited.



You can still upload files & images when you report an issue or add an action, and you can now also add additional files.

When you add an Action, you can choose a 'Form' to include custom fields (more on 'Forms' later).

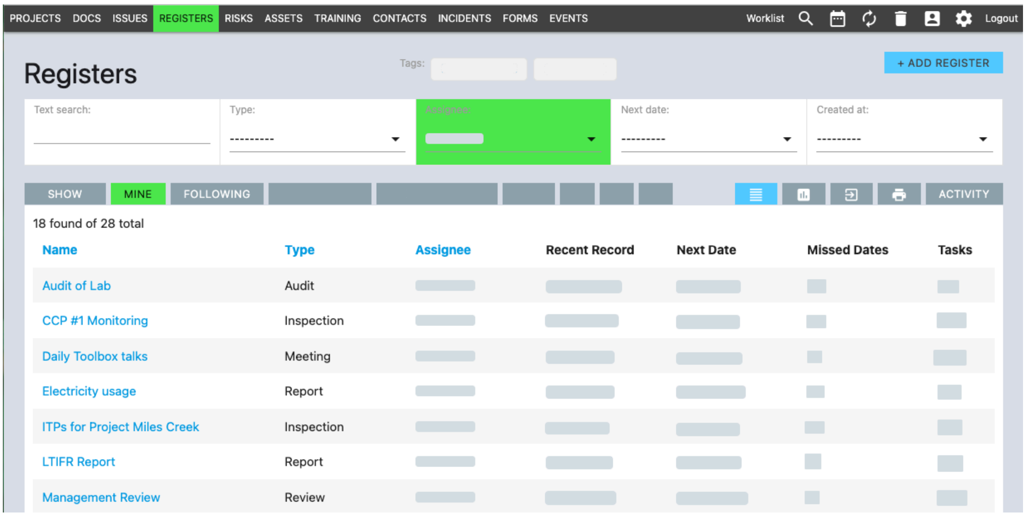
There are still sub-tasks so you can plan your corrective action response and assign various tasks to different people.

Completed	Task	Assignee	Due Date
☑	contact supplier for RMA	Ada Min	July 1, 2020
☑	return parts with defect report	Sam Smith	July 3, 2020
☐	install old gear and allow operation at reduced capacity	Sam Smith	July 8, 2020
☐	followup supplier for their investigation results	Azuma Yakira	July 10, 2020

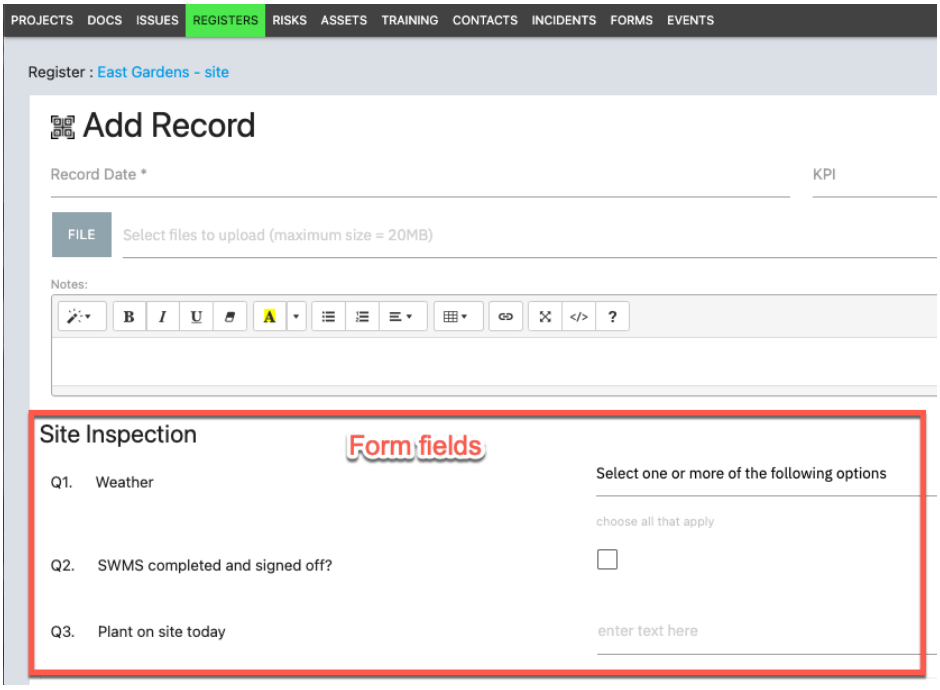
The 'Add Issue" form has a QR code, so you can post it on a notice board and people can scan the code to easily add an Issue from their tablet / phone.

Records → Registers

The Records module has been renamed to 'Registers' and works closely with the new Forms module. 'Registers' in v3 work the same as 'Schedules' in v2, with an optional repeating due date, and Records collection.



Nominate a 'Form' to use for a Register, so that when you add a Record, it will automatically include the custom fields that are defined in the Form:



When you export Register records, it will include the data captured in your custom form fields.

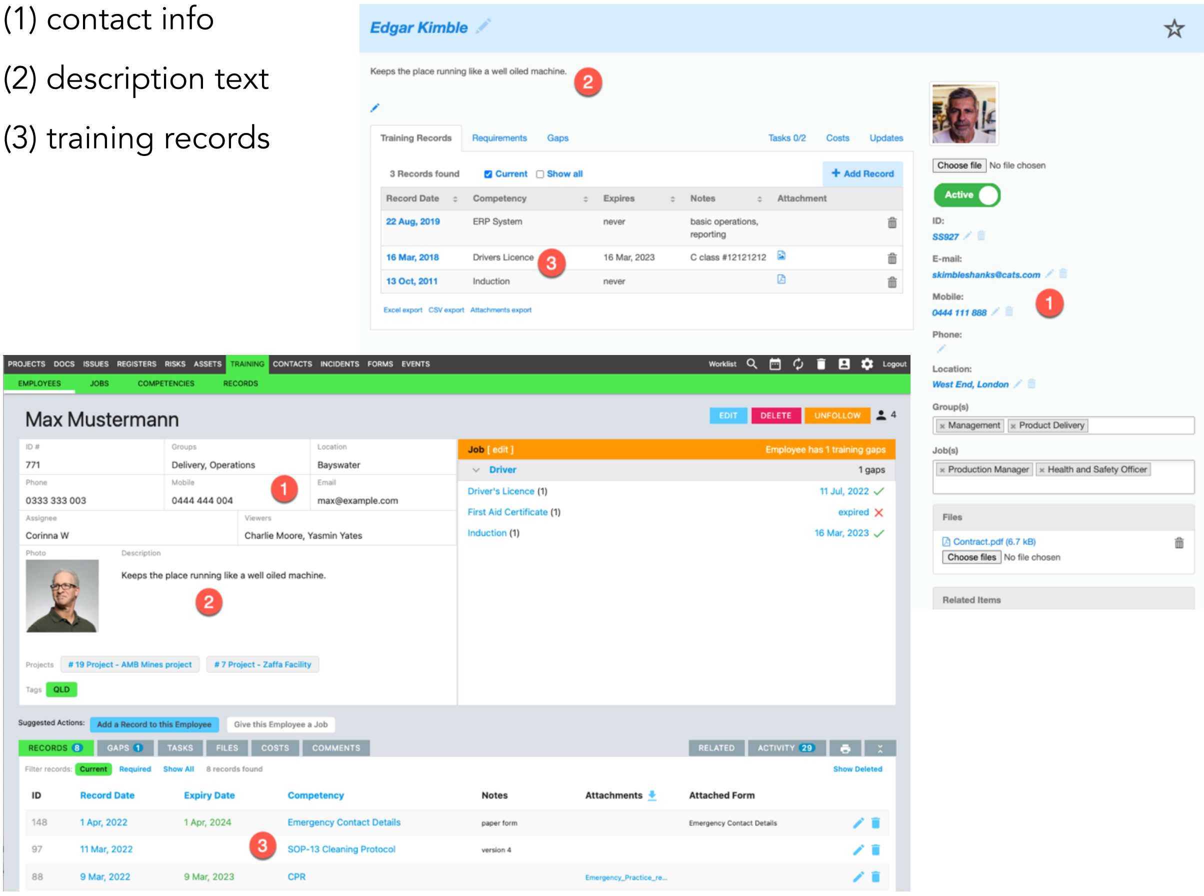
Training

The functionality is largely the same, but layout and permissions have changed.

(1) contact info

(2) description text

(3) training records



Members - can view the list of employees, and Jobs and Competencies. Members can't see the employee view with contact details or training records.

Assignee - there's now an 'Assignee' who will be notified of upcoming expiry dates on their worklist (not all training managers).The Assignee can view and edit the employee details and manage training records for that employee.

Viewers - nominate multiple 'Viewers' for an employee to grant permission for the Viewer users to see training record info for that employee (but not edit anything). e.g. to allow a manager to view their team's records, allow the employee to see their own records. Viewers also see expiry dates on their worklist.

Training_Managers can manage (add, edit) training records for all employees.

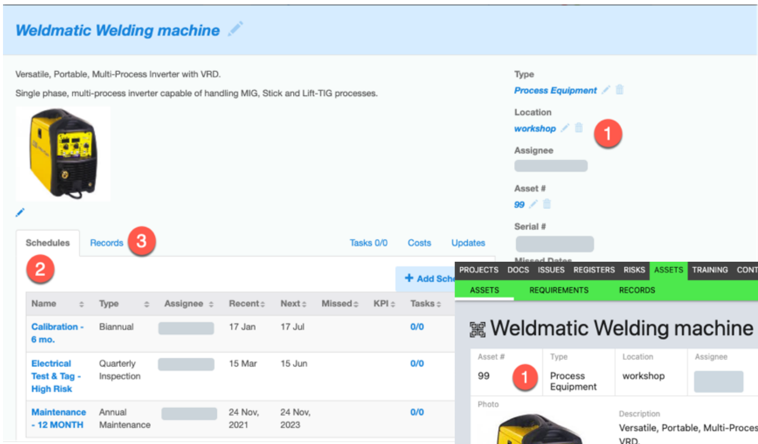
Training_Members can view details and training records for all employees, but can't change anything.

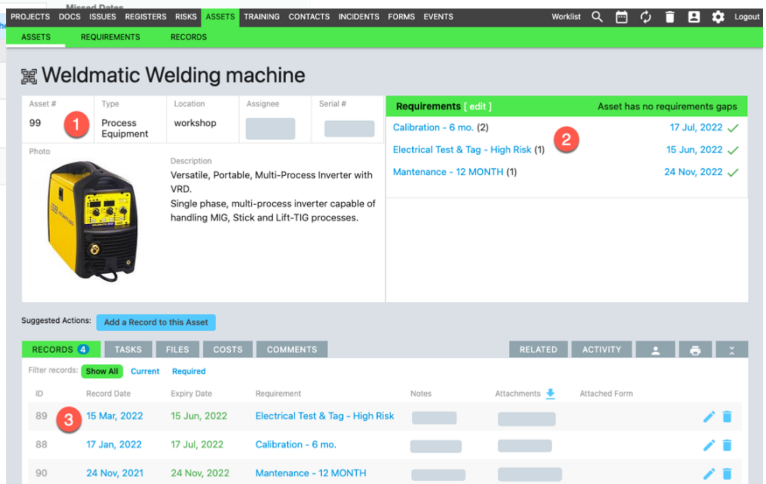
Plus:

- Training matrix for search results
- Search for employees by competency held

Assets

Managing maintenance and calibration for assets has changed from using a repeating ‘schedule’ to setting a ‘requirement’ with records that expire. Rather than multiple schedules, an asset has multiple requirements. The layout has changed too.





(1) Asset info

(2) Schedules → Requirements

(3) Records

Rather than a scheduled annual calibration due on the same date each year (regardless of when it was done), the next calibration comes due when the previous calibration record expires - one year after it was last done.

Requirements are defined centrally so you define the annual calibration *requirement* once, and just assign it to every asset this requirement applies to. (No need to create multiple annual calibration schedules).

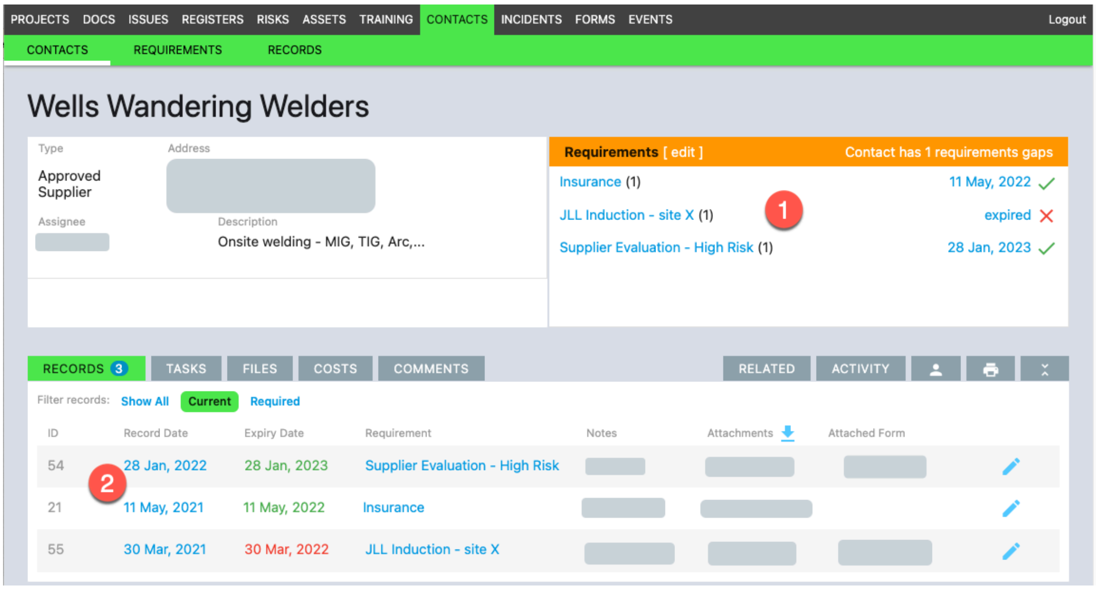
For an Asset to comply with a requirement for 'annual calibration', you add a Record for ‘annual calibration’. Toolbox will automatically set the ‘Expiry date’ field based on when the calibration was done (‘Record Date’). A reminder is sent for the expiry date.

Plus:

- Attach the asset QR code for easy retrieval of asset information
- Choose a ‘Form’ to use with an Asset Record to include the custom fields.
- More, better search options

Contacts

In v3, you can now track supplier compliance with requirements (#1 below) that you set (e.g. insurance, supplier evaluation, contract) and store records (#2) to show the Contact meets those requirements.

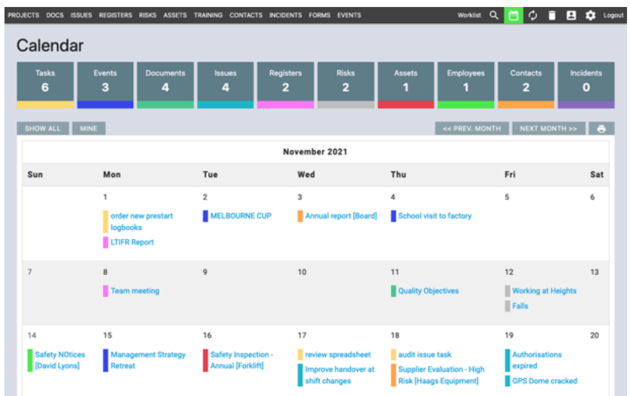


The assignee will receive reminders about upcoming expiry dates and you can easily report on compliance gaps, and find Suppliers who meet certain requirements.

Use the same function to track other stakeholder obligations - e.g. an annual report to a regulator, quarterly client updates, etc.

For supplier evaluation, you can define your own form and criteria using the new 'Forms" module. Then use that form when you add a record to the Contact.

Calendar, plus Events



Calendar collects all the due date content throughout the site as it did in v2. There are tabs to quickly filter by 'Mine' and 'Show All'. The summary boxes up the top tell you how many of each type there are and will filter the calendar content for you.

There's also a separate Events module so you can add one-off events to the calendar, e.g. meetings, training events, audits, holidays, etc. Events have sub-tasks, files, and description text so you can add a meeting agenda by uploading a file or add details directly. The Event contact person and the attendees will see the event on the calendar and worklist and in the weekly worklist reminder email.

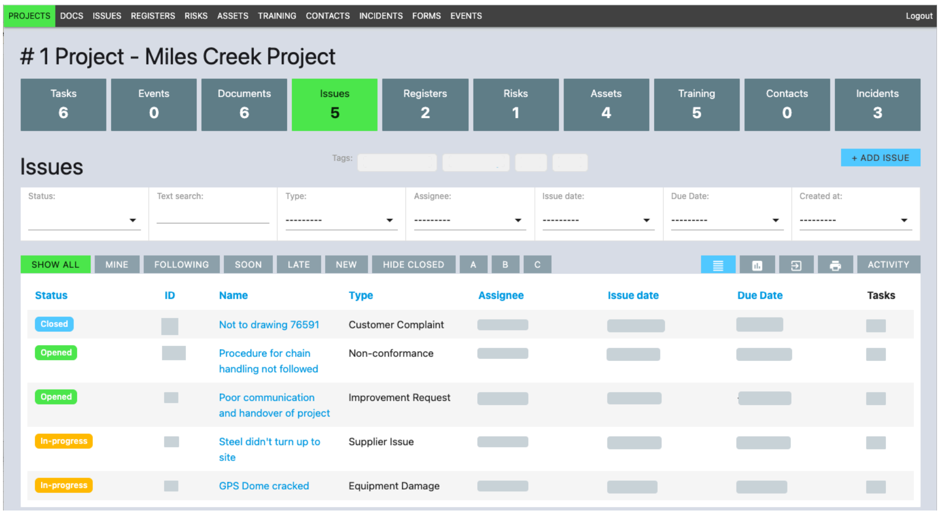
Projects

These are still used to organise tasks, but in v3 they also can act as a 'portal' or 'window' into your content that filters the search results.

Link content to a project like you apply a tag.

'Projects' can be actual projects, but they're useful for organising content by department, branch location, product or service lines, or even by a major stakeholder. A user can access the system through a project to quickly find their relevant content.

When you view the project, your documents, issues, assets, etc, are pre-filtered to show only the items linked to that project. e.g. see project Issues:



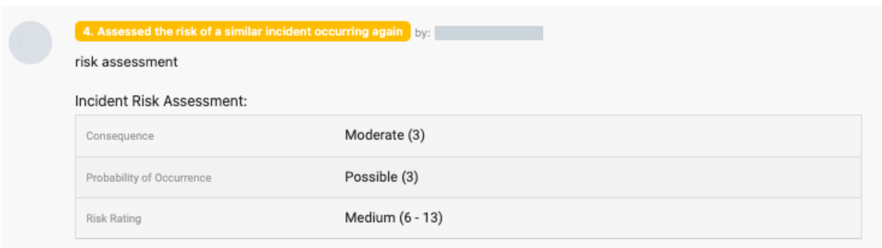
If you're viewing a project and add new content, it's automatically linked.

Note that Projects don't affect permissions to access content.

Incidents

Not much has changed except that the status of the Incident is not tied to the Action category, so you can easily reopen an Incident that was closed in error, without having to delete an action.

Like in Issues, you can use a Form when you add an Action:

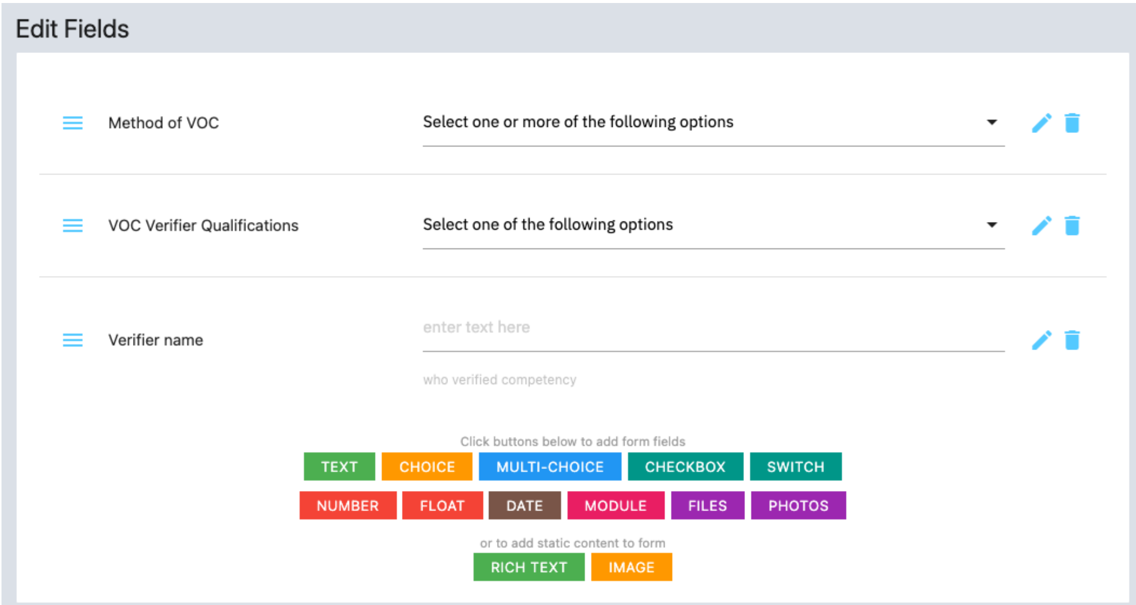


Risks (no changes)

Forms

This is a new module where you can define electronic "Forms" with custom fields to structure the data you want to collect.

There are different field types to gather data, and content blocks for text and images so you can include instructions in the Form:



The defined Form can be used throughout Toolbox when you add a record, e.g.,

- attach a defects report form to an issue Action,
- attach a supplier evaluation form to a Contact Record,
- fill in an induction form for an Employee on a Training Record,
- complete a pre-start inspection for an Asset on an Asset Record,
- capture contributing factors for an incident investigation Action,
- set up a Register to collect a site safety inspection every month.

Look for "Add Form to Record" when you're adding a record:

Once you select the form, the fields will appear at the bottom of the record.

How does the upgrade work?

We will take a copy of your data and migrate it across to a new site with the new version of QSToolbox. While that happens, you'll need to stop making changes to your data for a few hours. The upgrade is scheduled to minimise disruption for your users. When it's done, you'll login to your site at a new URL and set a new password.

Next? Book in with Corinna for a preview and/or a training session over Zoom.