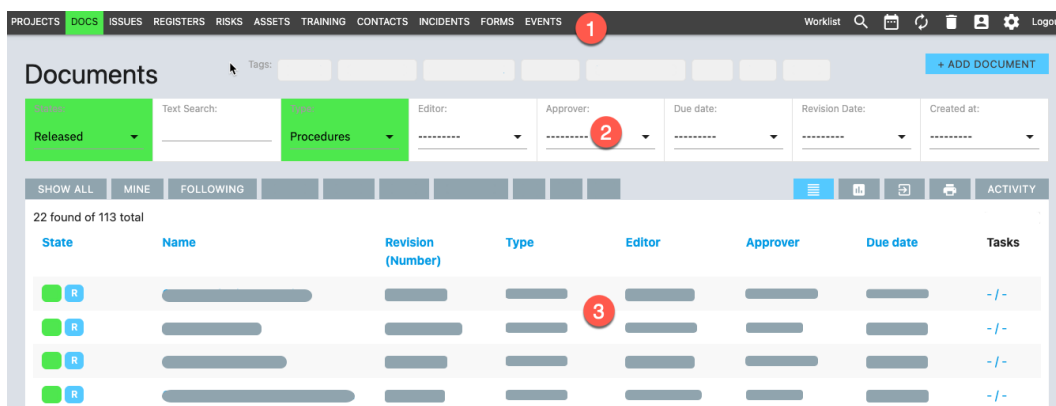
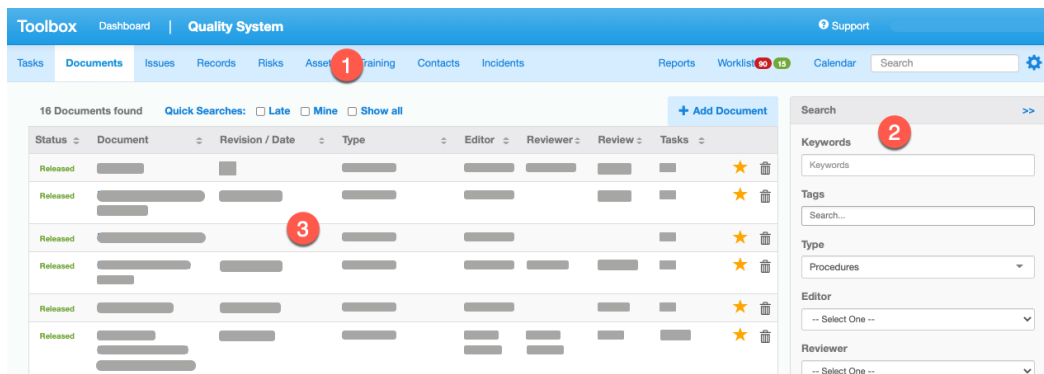








Quality Systems Toolbox - upgrade from version 2 to version 3.

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

General

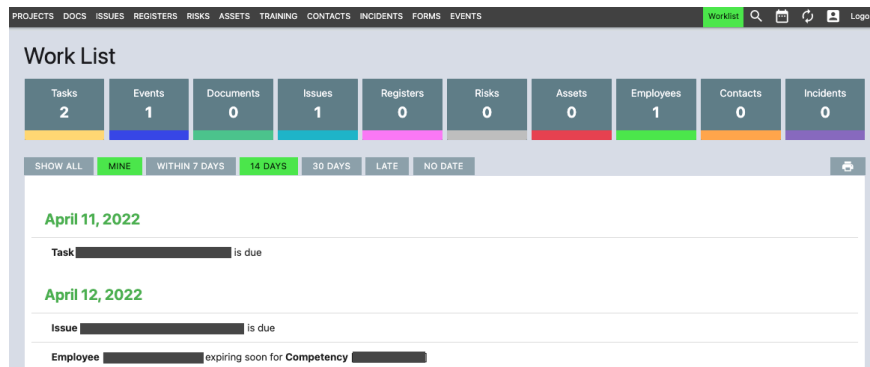
The overall structure is much the same, with modules for Documents, Issues, Assets, Training, etc. shown at the top of the screen (1). Each module still has search options (2), with the results shown in a register or list (3).



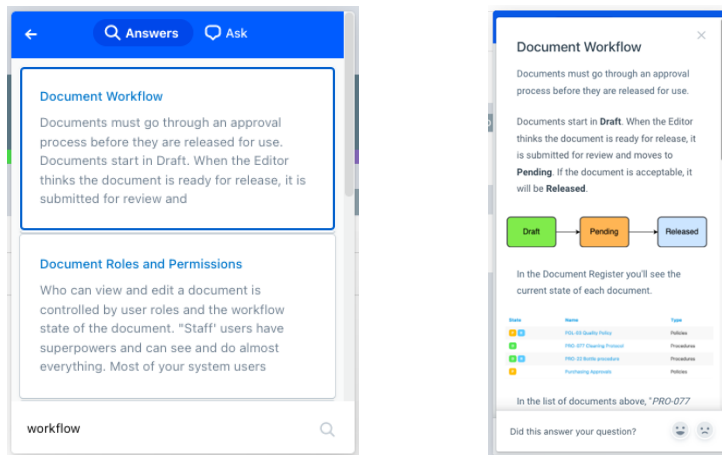
- Rather than everyone logging in at 'toolbox.qualitysystems.com', each customer has their own URL, e.g. mysite.qualitysystems.com
- Edit content via an "edit" mode for everything all at once,  rather than a pencil edit icon per field. 
- "Delete" is a recycle bin and content can be easily rescued. 
- "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:



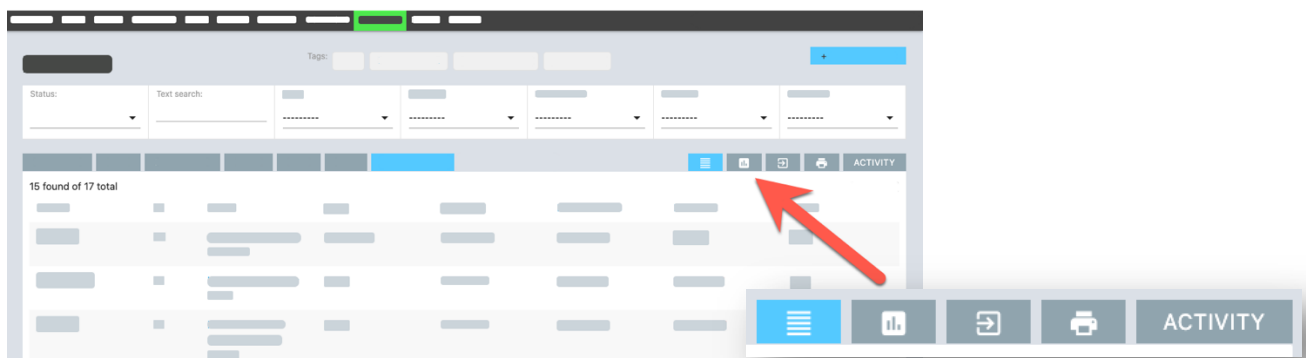
When you log in, you go directly to your Work List. It can be filtered by type using the summary boxes up the top, and by date using the tabs.



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:

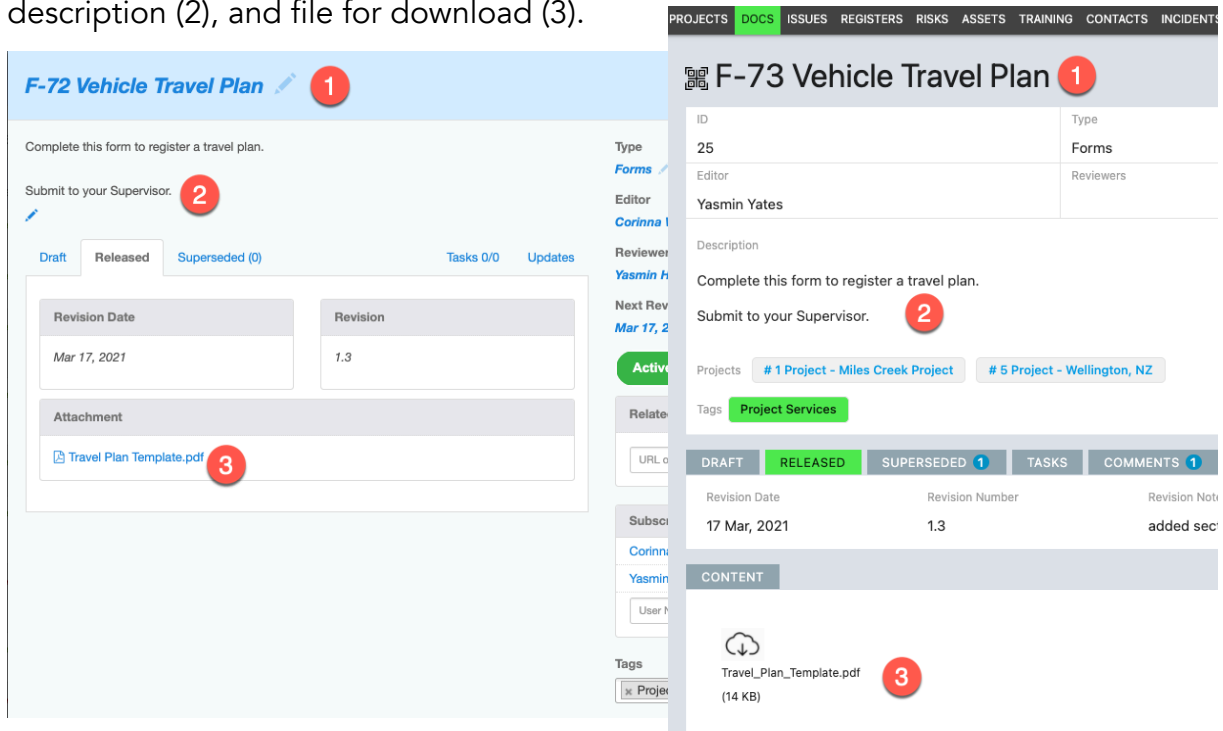
- Saved 'collections' A, B, C to quickly access your favourite items
- System "Activity" tracking - filter by: item, module, user, followed, timeframe, all.
- Bulk edit to apply/remove tags, update assignee, add training records.
- QR codes for easy access to key information

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.

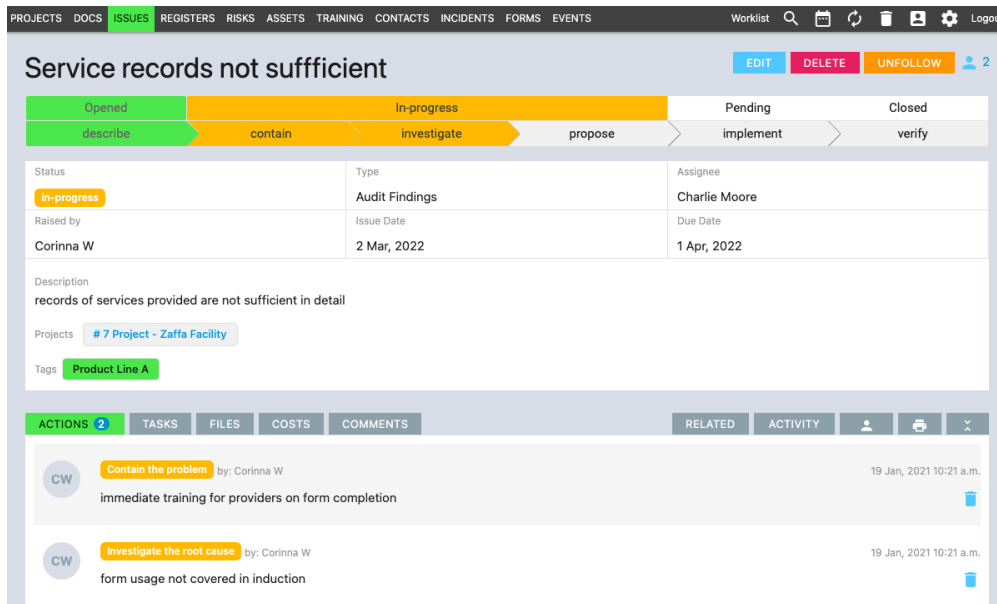
RELEASED	TASKS	COMMENTS 1	RELATED	ACTIVITY 27	2		
Revision Date	Revision Number	Revision Note	Approved By	Approval Date			
17 Mar, 2021	1.3	added section for rest times	Corinna W	21 Jul, 2021			

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.



The screenshot shows the 'Issues' page in the QualitySystems Toolbox. The issue title is 'Service records not sufficient'. The status is 'In-progress'. The workflow progress bar shows: describe (green), contain (orange), investigate (orange), propose (grey), implement (grey), and verify (grey). The issue details include:

Status: In-progress	Type: Audit Findings	Assignee: Charlie Moore
Raised by: Corinna W	Issue Date: 2 Mar, 2022	Due Date: 1 Apr, 2022

Description: records of services provided are not sufficient in detail

Projects: # 7 Project - Zaffa Facility

Tags: Product Line A

Actions list:

- Contain the problem** by: Corinna W (19 Jan, 2021 10:21 a.m.)
immediate training for providers on form completion
- Investigate the root cause** by: Corinna W (19 Jan, 2021 10:21 a.m.)
form usage not covered in induction

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).

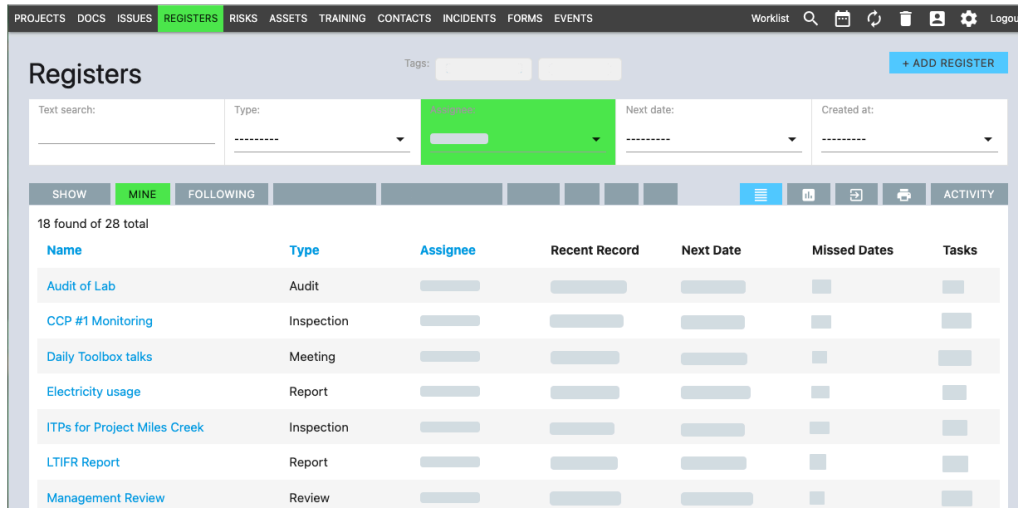
There are still sub-tasks so you can plan your corrective action response and assign various tasks to different people.

Completed	Task	Assignee	Due Date
<input checked="" type="checkbox"/>	contact supplier for RMA	Ada Min	July 1, 2020
<input checked="" type="checkbox"/>	return parts with defect report	Sam Smith	July 3, 2020
<input type="checkbox"/>	install old gear and allow operation at reduced capacity	Sam Smith	July 8, 2020
<input type="checkbox"/>	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.

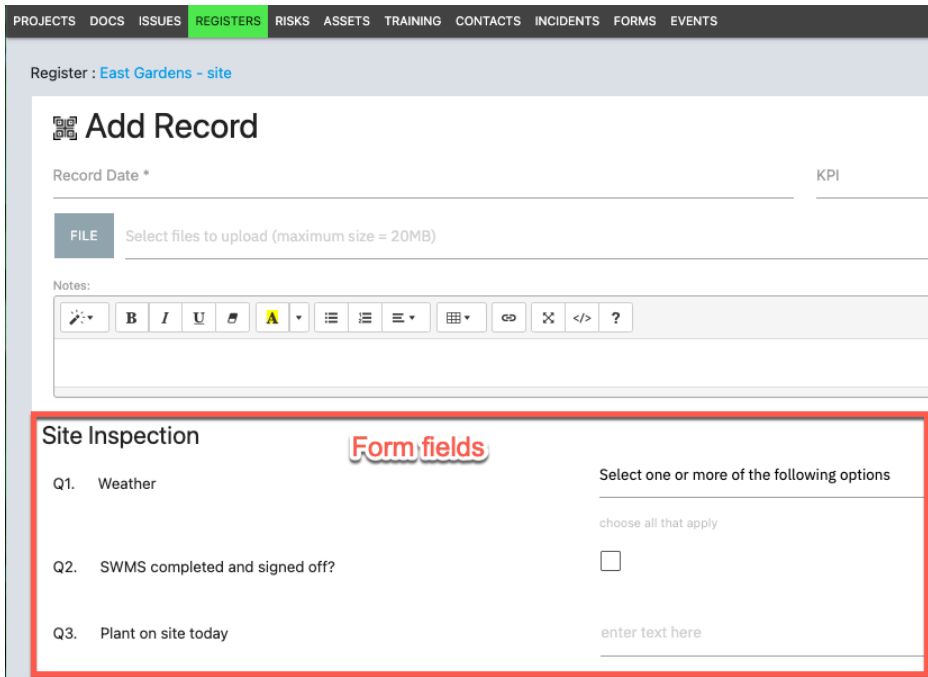
Records → Registers

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.



The screenshot shows the 'Registers' interface with a navigation bar at the top containing: PROJECTS, DOCS, ISSUES, **REGISTERS**, RISKS, ASSETS, TRAINING, CONTACTS, INCIDENTS, FORMS, EVENTS. A 'Worklist' search bar and 'Logout' button are also present. Below the navigation is a 'Registers' header with a '+ ADD REGISTER' button and search filters for 'Text search:', 'Type:', 'Next date:', and 'Created at:'. A table below shows 18 found of 28 total records with columns: Name, Type, Assignee, Recent Record, Next Date, Missed Dates, and Tasks. The table lists records such as 'Audit of Lab', 'CCP #1 Monitoring', 'Daily Toolbox talks', 'Electricity usage', 'ITPs for Project Miles Creek', 'LTIFR Report', and 'Management Review'.

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:



The screenshot shows the 'Add Record' form for a register named 'East Gardens - site'. The form includes a 'Record Date *' field with a 'KPI' label, a 'FILE' upload section, and a 'Notes' section with a rich text editor. Below the notes, a red box highlights the 'Site Inspection' form fields, which include:

- Q1. Weather: Select one or more of the following options (checkboxes)
- Q2. SWMS completed and signed off?:
- Q3. Plant on site today: enter text here (text input)

 The text 'Form fields' is written in red above the highlighted section.

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

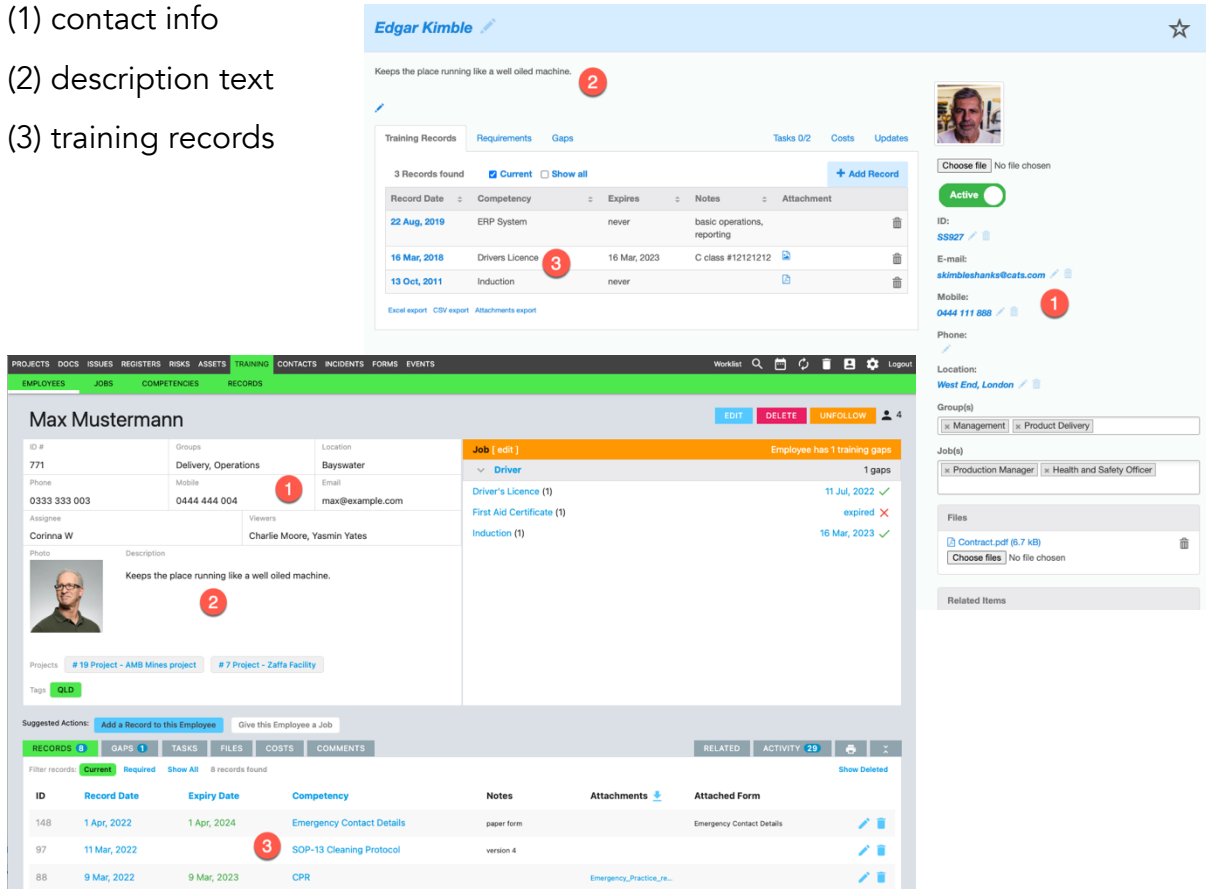
Training

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

(1) contact info

(2) description text

(3) training records



The screenshot displays the QualitySystems Toolbox interface. The top section shows the profile for 'Edgar Kimble' with a description: 'Keeps the place running like a well oiled machine.' Below this is a table of training records:

Record Date	Competency	Expires	Notes	Attachment
22 Aug, 2019	ERP System	never	basic operations, reporting	
16 Mar, 2018	Drivers Licence	16 Mar, 2023	C class #12121212	
13 Oct, 2011	Induction	never		

The bottom section shows the profile for 'Max Mustermann' with contact information (ID: 771, Phone: 0333 333 003, Mobile: 0444 444 004, Email: max@example.com) and a list of training records:

ID	Record Date	Expiry Date	Competency	Notes	Attachments	Attached Form
148	1 Apr, 2022	1 Apr, 2024	Emergency Contact Details	paper form		Emergency Contact Details
97	11 Mar, 2022		SOP-13 Cleaning Protocol	version 4		
88	9 Mar, 2022	9 Mar, 2023	CPR		Emergency_Practice_re...	

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.

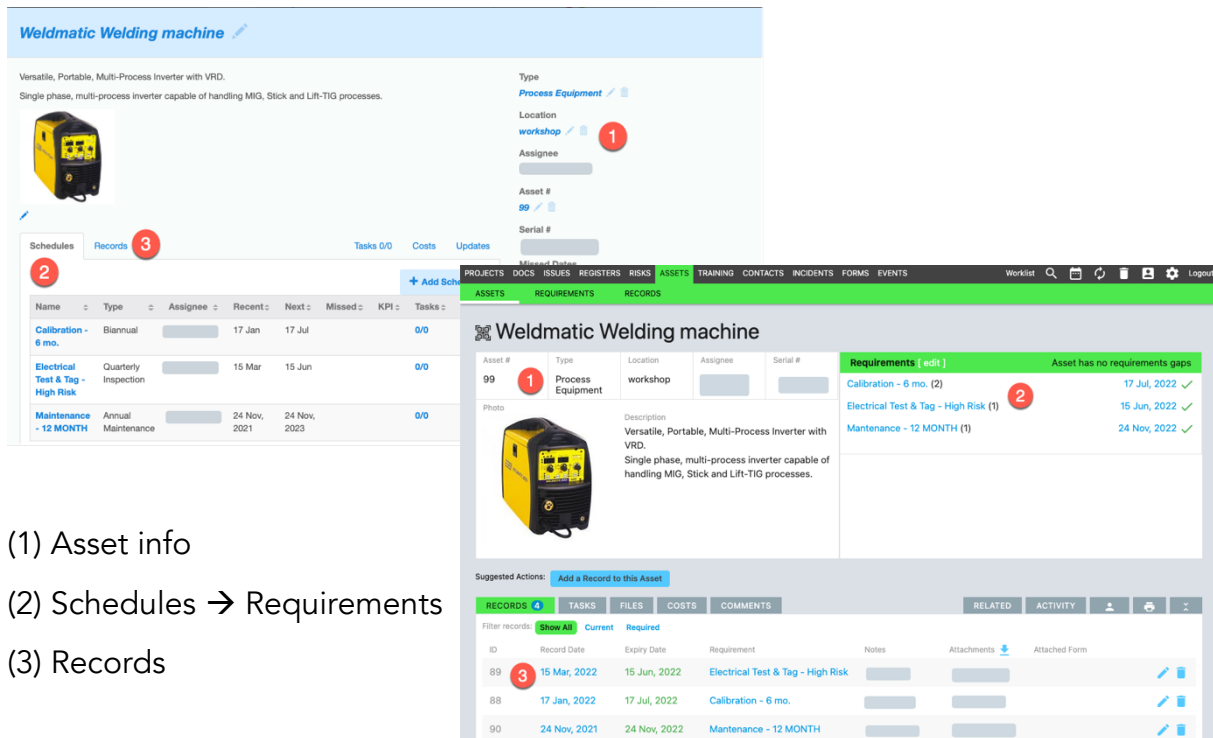
Training_Members can view details and training records for all employees, but can't change anything.

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.



Weldmatic Welding machine

Versatile, Portable, Multi-Process Inverter with VRD.
Single phase, multi-process inverter capable of handling MIG, Stick and Lift-TIG processes.

Type: Process Equipment
Location: workshop
Assignee: [blank]
Asset #: 99
Serial #: [blank]

Name	Type	Assignee	Recent	Next	Missed	KPI	Tasks
Calibration - 6 mo.	Biannual		17 Jan	17 Jul		0/0	
Electrical Test & Tag - High Risk	Quarterly Inspection		15 Mar	15 Jun		0/0	
Maintenance - 12 MONTH	Annual Maintenance		24 Nov, 2021	24 Nov, 2023		0/0	

Requirements [edit] Asset has no requirements gaps

Calibration - 6 mo. (2)	17 Jul, 2022	✓
Electrical Test & Tag - High Risk (1)	15 Jun, 2022	✓
Maintenance - 12 MONTH (1)	24 Nov, 2022	✓

ID	Record Date	Expiry Date	Requirement	Notes	Attachments	Attached Form
89	15 Mar, 2022	15 Jun, 2022	Electrical Test & Tag - High Risk			
88	17 Jan, 2022	17 Jul, 2022	Calibration - 6 mo.			
90	24 Nov, 2021	24 Nov, 2022	Maintenance - 12 MONTH			

(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.

Requirement *

Calibration - 12 mo.

Record Date *

2022-04-20

Expiry Date

2023-04-20

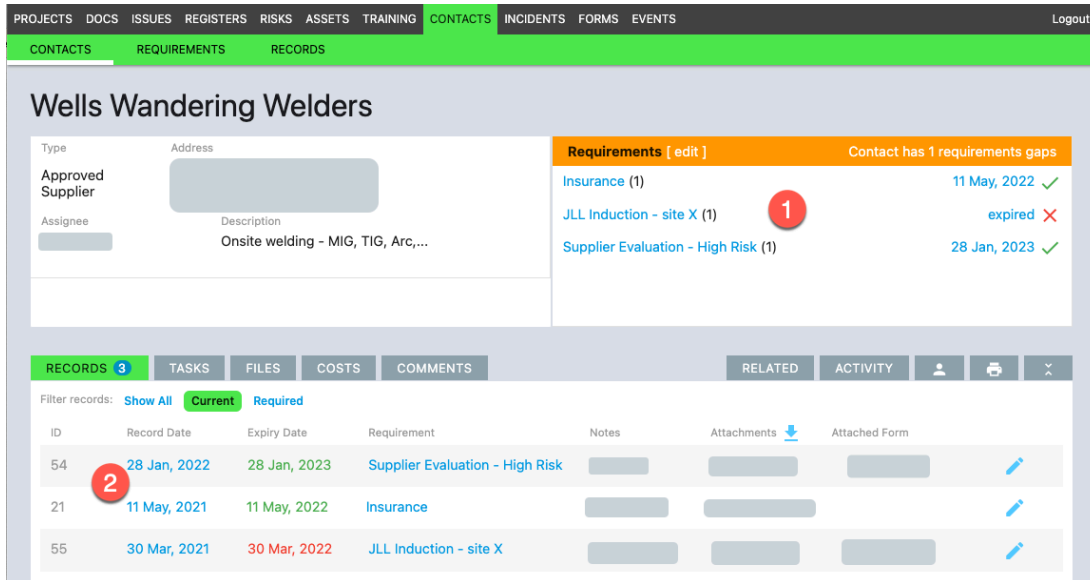
(suggested expiry date added - adjust as needed)

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 screenshot shows the 'CONTACTS' module in the QualitySystems interface. The contact is 'Wells Wandering Welders', an 'Approved Supplier' with the description 'Onsite welding - MIG, TIG, Arc,...'. A 'Requirements' section shows three items: 'Insurance (1)' (expired 11 May, 2022), 'JLL Induction - site X (1)' (expired), and 'Supplier Evaluation - High Risk (1)' (due 28 Jan, 2023). A red circle with the number '1' is next to the JLL Induction item. Below this is a 'RECORDS' table with 3 records, filtered by 'Current' and 'Required'.

ID	Record Date	Expiry Date	Requirement	Notes	Attachments	Attached Form
54	28 Jan, 2022	28 Jan, 2023	Supplier Evaluation - High Risk			
21	11 May, 2021	11 May, 2022	Insurance			
55	30 Mar, 2021	30 Mar, 2022	JLL Induction - site X			

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

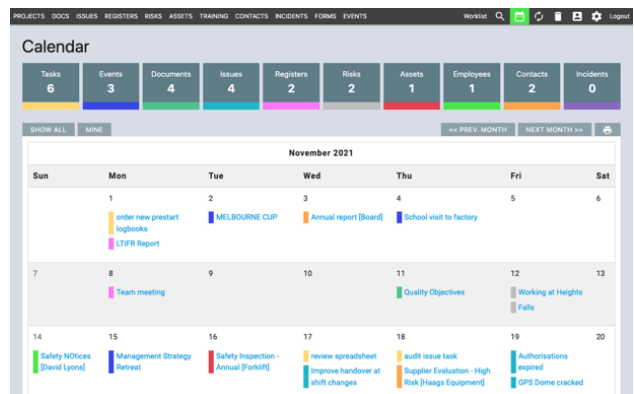
Use the same function to track other stakeholder obligations - e.g. an annual report to a regulator, quarterly client updates, etc.

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.



The screenshot shows the 'Calendar' module in the QualitySystems interface. At the top, there are summary boxes for various categories: Tasks (6), Events (3), Documents (4), Issues (4), Registers (2), Risks (2), Assets (1), Employees (1), Contacts (2), and Incidents (0). Below this is a calendar grid for November 2021, showing events such as 'order new prestart logbooks', 'LTI/R Report', 'Team meeting', 'Management Strategy Retreat', 'Safety Inspection Annual [parking]', 'review spreadsheet improve handover at shift changes', 'audit issue task Supplier Evaluation - High Risk [Haga Equipment]', and 'Authorisations expired'.

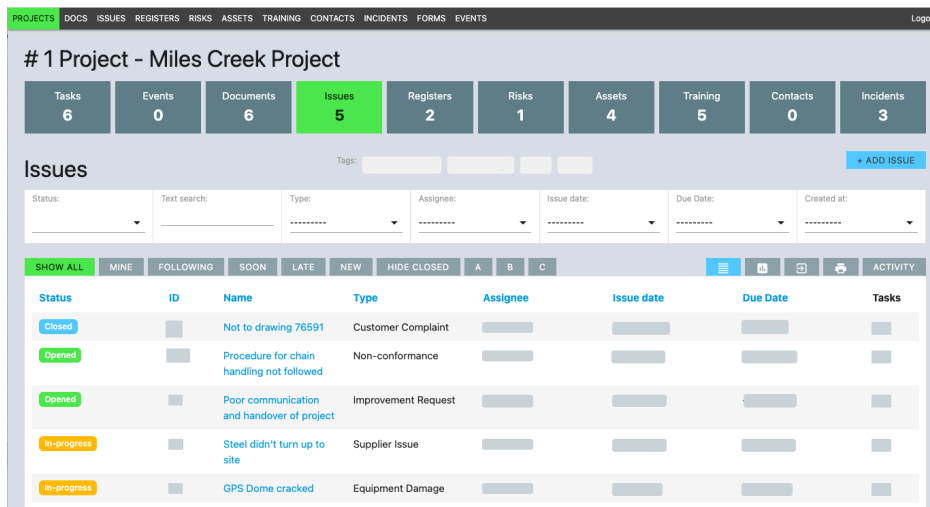
Projects

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:



The screenshot shows the 'Miles Creek Project' page. At the top, there's a navigation bar with 'PROJECTS' selected. Below it, a summary bar shows counts for various categories: Tasks (6), Events (0), Documents (6), Issues (5), Registers (2), Risks (1), Assets (4), Training (5), Contacts (0), and Incidents (3). The 'Issues' section is active, displaying a table of issues with columns for Status, ID, Name, Type, Assignee, Issue date, Due Date, and Tasks. The issues listed are:

Status	ID	Name	Type	Assignee	Issue date	Due Date	Tasks
Closed		Not to drawing 76591	Customer Complaint				
Opened		Procedure for chain handling not followed	Non-conformance				
Opened		Poor communication and handover of project	Improvement Request				
In-progress		Steel didn't turn up to site	Supplier Issue				
In-progress		GPS Dome cracked	Equipment Damage				

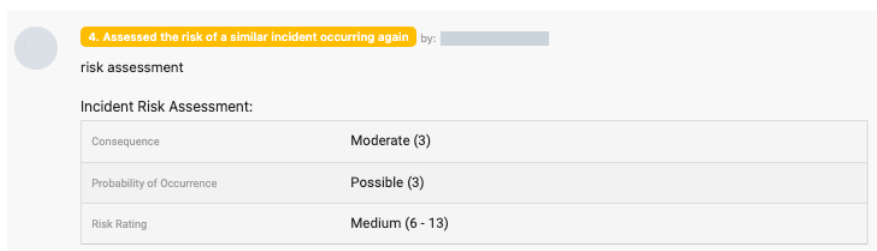
If you're viewing a project and add new content, it's automatically linked.

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:



The screenshot shows a form for an incident risk assessment. The title is '4. Assessed the risk of a similar incident occurring again' by [user]. The form is titled 'risk assessment' and contains the following information:

Incident Risk Assessment:

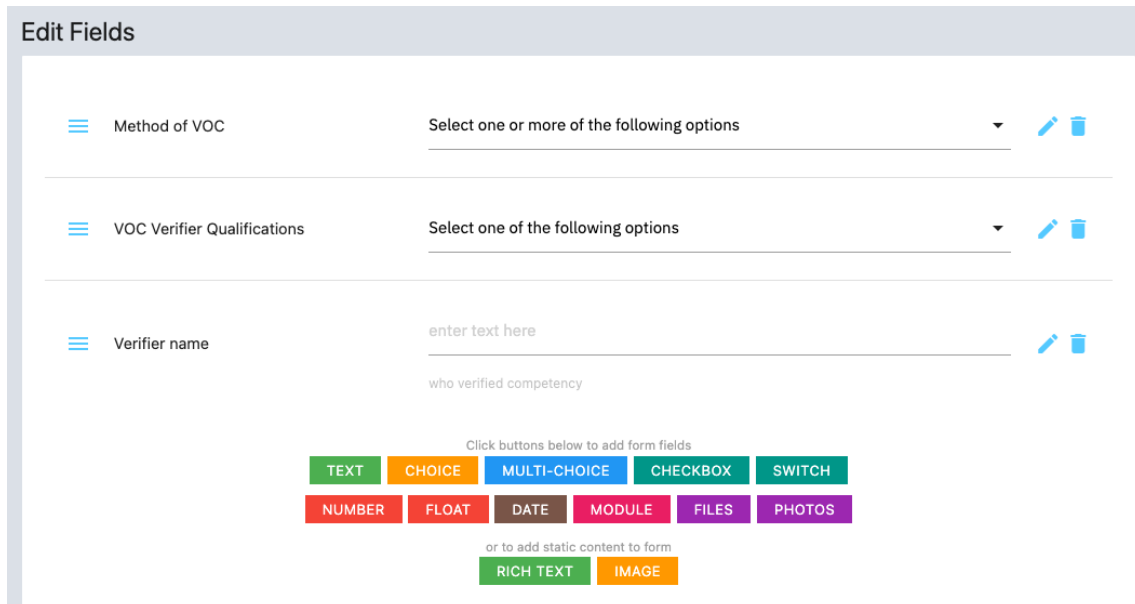
Consequence	Moderate (3)
Probability of Occurrence	Possible (3)
Risk Rating	Medium (6 - 13)

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:



Edit Fields

Method of VOC Select one or more of the following options

VOC Verifier Qualifications Select one of the following options

Verifier name enter text here
who verified competency

Click buttons below to add form fields

TEXT CHOICE MULTI-CHOICE CHECKBOX SWITCH

NUMBER FLOAT DATE MODULE FILES PHOTOS

or to add static content to form

RICH TEXT IMAGE

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:

Add Record

+ ADD FORM TO RECORD NO THANKS

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.