ClarityQMS

User Guide

A practical handbook for Quality Managers and their teams — setup, day-to-day use, and best practices for every module.

Version 4.1 · 23 November 2026
Workspace: _____
Owner: _____

Supersedes Version 3.0 (16 November 2026).

How to use this guide

This guide is organised to match the sidebar in ClarityQMS: **Workspace**, **Document & Change**, **Quality Events & CAPA**, **Operations & Assets**, **People & Governance**, **Insights & Reviews** and **Admin**. Each chapter opens with the module's purpose, then walks through one-time setup (typically performed by the Quality Manager, Admin or SuperAdmin), followed by day-to-day use for the wider team. Every chapter closes with a short list of QMS best practices you can adopt straight away.

Version 4.1 adds the chapter **Root cause tools — 5 Whys, Fishbone and 8D**: running an analysis directly on a customer complaint or inspection, escalating it to a CAPA or 8D, the 8D filter on the CAPA list and the analyses-by-source dashboard card.

Version 4.0 added annotated screenshots and a **Where to find it** box at the top of each chapter, showing exactly which sidebar entry and button to use. Numbered red markers in a screenshot match the numbered steps beside it. It also documents the new CAPA workspace (containment, action plan, effectiveness check, signed closure), the optional 8D method, CAPA follow-ups to change control and retraining, CAPA and inspection PDF exports, the CAPA & Problem Solving dashboard, attaching a file when creating a document, and the document approval trail. Appendix E is a one-page **Where is it?** quick reference.

Version 3.0 reviewed the complete system and adds detailed instructions for report design and recurring templates, Insights data, date and location searches, saved dashboard tiles, competency requirements, supplier scoring, controlled document revisions, signed calibrations and certificates, inspection PDFs, trials and public/support pages. It also corrects unsupported workflow instructions. Features depend on your plan, abilities and location scope; a missing control does not mean you should bypass access restrictions.

Conventions

- **Bold** labels refer to buttons, menu items, or field names as they appear in the app.
- *Italic* paths describe where to click, for example *Admin settings › Roles & abilities*.
- Coloured callouts flag practical guidance:

> **Tip.** A hint that saves clicks or avoids a common mistake.

> **Best practice.** A QMS best practice — worth adopting even if the tool doesn't force it.

> **Watch out.** Something to double-check before it causes data quality issues.

> **Note.** Background context, a plan limit, or a role restriction.

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Printing

The guide is designed for US Letter, single-sided or duplex. Colour printing preserves the badge legend in Appendix B; greyscale is fine everywhere else. Open it any time from *Admin settings › User guide*, where **Print** and **Download** are available. Distribute a printed copy to new joiners during onboarding and keep a controlled electronic master in Documents.

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Getting started

ClarityQMS is a multi-company quality management system. Every workspace is fully isolated: ordinary workspace users can access only their authorized company records; separately authorized platform administration is documented later in this guide. This chapter covers the ideas you need before opening any module.

Creating your workspace

1. From the website, choose **Sign up** and enter your name, workspace name, work email, and a password of at least 8 characters.
2. Confirm the email if prompted. The first user becomes the **SuperAdmin** and receives the full ability set automatically, including owner-only billing controls.
3. Sign in to land on **Home**. The left sidebar is your permanent navigation.

Navigating the workspace

The sidebar groups modules by purpose. You only see entries your role allows.

- **Workspace** — Home, My approvals, My tasks, Calendar. Your personal starting point.
- **Document & Change** — Documents and Change control.
- **Quality Events & CAPA** — CAPA & nonconformance, Inspections, Complaints, Audits.
- **Operations & Assets** — Work orders, Equipment & calibration, Supplier quality.
- **People & Governance** — Training & competency, Risk register, Compliance register.
- **Insights & Reviews** — Dashboards, Goals & KPIs, Scorecard, Management review, Reports.
- **Admin** — Admin settings, grouped into Quality system setup, Approval config, Organization, Platform and Resources.

- The **Back** arrow returns to your previous page (or the parent section for a direct link). **Breadcrumbs** at the top of each page show where you are (for example *ClarityQMS Demo › Insights › Scorecard*); click any level to step back.
- **Favorites** — open a Quality module root page, choose **Module options › Pin to favorites**. Unpin from the same menu. Only Quality modules are eligible, up to five; pins are saved to your profile, not arbitrary detail pages.
- **Search records** (Ctrl K / ⌘ K) finds documents, CAPAs, audits, suppliers and more by code or title, limited to what you are allowed to see.
- **Remembered tabs** — hubs such as Dashboards and Goals & KPIs reopen on the tab you last used. A shared link always wins over your saved choice.
- The **notification bell** and the **Synced** indicator sit top right; the avatar menu at the bottom of the sidebar holds Profile and Sign out.

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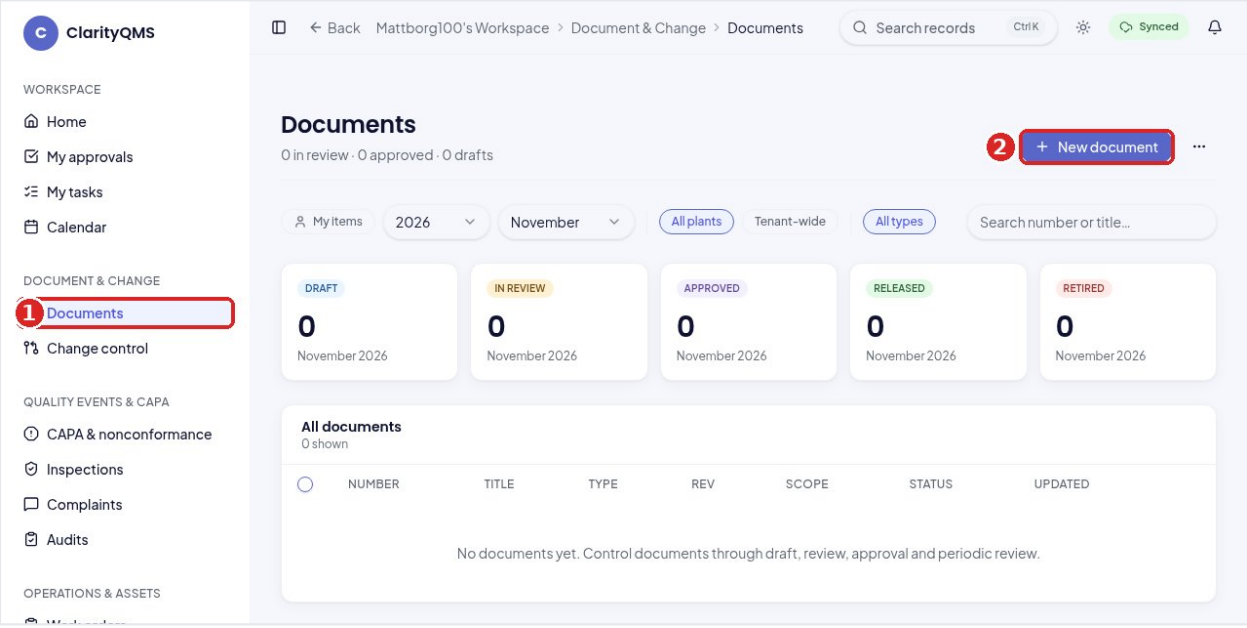


Figure — The sidebar groups (left) and a module page. (1) Click a sidebar entry to open the module; (2) the main create button always sits at the top right of the page header.

> **Tip.** Pin the three pages you open every day. Favorites appear at the top of the sidebar, ahead of the module groups.

Roles and abilities

Access is controlled by a per-module ability matrix. Six actions — view, create, edit, delete, print, export — can be granted independently for every module, plus workflow abilities such as approve, close or bulk. These preset roles ship with every workspace:

Role	Typical user	Default scope
SuperAdmin	Workspace owner	Everything, including billing and paid switches such as dashboard auto refresh
Admin	System administrator	All modules and settings except owner-only billing switches
Quality Manager	QMS owner	Full quality modules; read on operations
Executive	Leadership	View, print and export across Insights; sign approvals
Department Manager	Area lead	Own department's records, KPI entry, goals
Quality Auditor	Internal auditor	Audits, findings, read on supporting modules
Inspector	Shop-floor inspector	Start and complete inspections; view work orders

Older workspaces may also show the legacy Management, Quality Clerk, Purchasing Manager and Purchasing Clerk roles. They keep working; review whether a newer preset fits better.

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> **Best practice.** Assign the least-privilege role that lets each person do their job. Only SuperAdmin and Admin can create roles — escalate on request rather than granting everything upfront.

Plants, departments, and scope

Records are tagged to a plant and optionally a department. Users can be scoped to one plant or department; scoped users only see records within their scope, even if they hold the ability to view them. Set plants and departments up first — retrofitting them across existing records is possible but tedious.

> **Watch out.** Deleting a plant or department is blocked while records reference it. Rename or mark it inactive instead.

Working offline

On the published app, ClarityQMS keeps working through short connection drops. Inspections can be captured offline and sync when you reconnect; successful inspection-dashboard data you have already opened can stay readable for 24 hours from a copy saved for your account only. If an offline change conflicts with someone else's, you are asked to review it before it is saved. Signing out deletes the saved copy.

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Home

Home is your personal landing page. It shows the work that is yours right now — counts of open items, pending approvals and quick actions — so you can start the day without hunting through modules.

Where to find it: Sidebar › Workspace › **Home** — also the page that opens after you sign in.

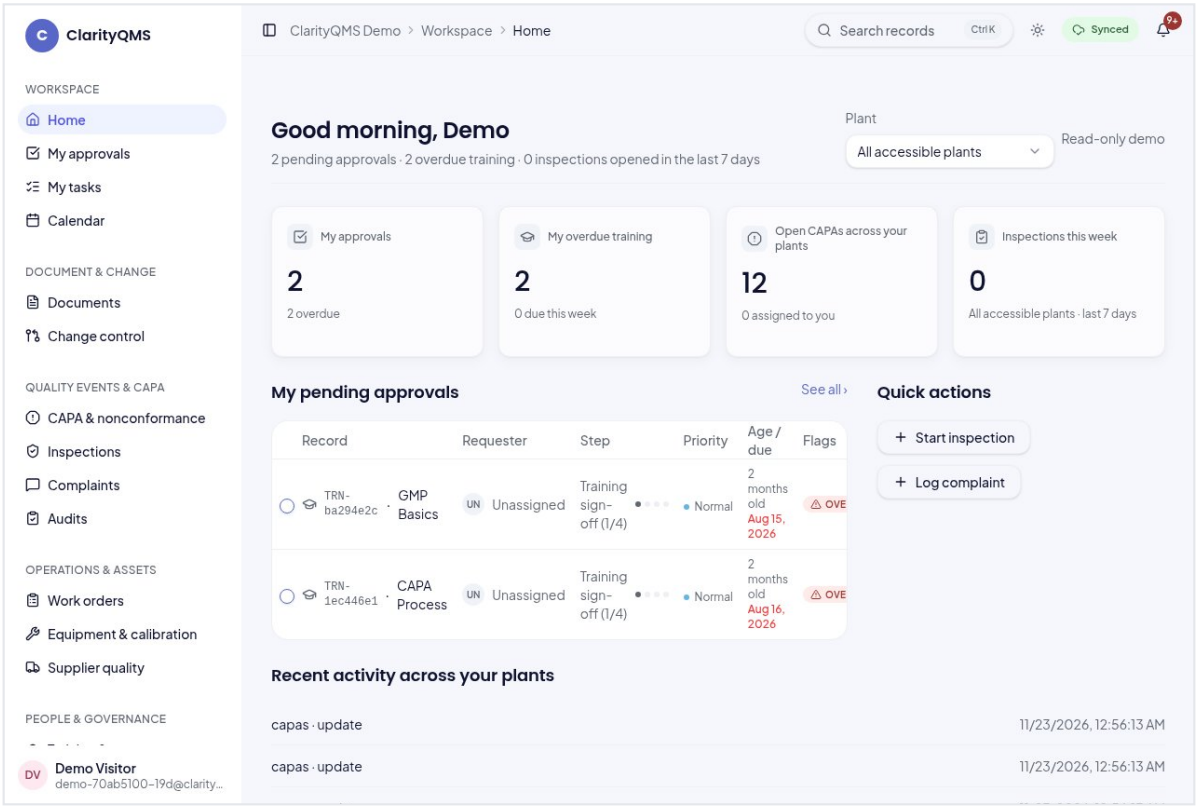


Figure — Home: counters, personal queues and saved report tiles. Click a counter to open the matching list.

> **Tip.** Choose a plant at the top of Home to focus every counter on one site. Without a plant selected, counts include every plant you can access.

Set up

1. No configuration is required: Home builds itself from your abilities. Make sure each person's role and plant scope are correct in *Admin settings › Users*.
2. Encourage everyone to make Home their bookmark — it is where ClarityQMS opens after sign-in.
3. Set a default plant in your profile so Home opens focused on your site.

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Day-to-day use

1. Read the counters: open CAPAs, documents due for review, training due, inspections and more. **0** means nothing is waiting; **Unavailable** means the count could not be read for your role or the connection failed — it is never shown as zero.
2. Review **My pending approvals** and open any item to sign it in the Approval Center.
3. Use **Quick actions** such as **Start inspection** and **Log complaint** for the most common jobs.
4. Click a counter to open the relevant queue or filtered module. Read its label: **My approvals** and **My overdue training** are personal, **Open CAPAs across your plants** is location-scoped, and **Inspections this week** is date-scoped. Do not assume every counter means My items.

Best practices & tips

- Clear Home to zero before lunch — small daily effort prevents a pile-up of overdue items.
- If a counter shows Unavailable for days, ask your Admin to check your role rather than ignoring it.
- Managers: compare your own Home with the team dashboard weekly; gaps reveal unassigned work.

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My tasks

My tasks gathers accessible actions assigned to you across the system — CAPA actions, goal actions, management review actions, training and more — into one list with due dates.

Where to find it: Sidebar › Workspace › **My tasks**.

Set up

1. Make sure actions are always given an owner and due date in their source module; unowned actions never reach anyone's task list.
2. Ask managers to review overdue tasks in their weekly team meeting.

Day-to-day use

1. Open *Workspace › My tasks*. Tasks are sorted by due date, with the source module shown on each row.
2. Tick **Overdue only** to see what needs attention first.
3. Click a task to open the source record, complete the work there and update its status.
4. The list loads more as you scroll. If **Some task sources are unavailable. Showing accessible assignments.** appears, the list is partial; check permissions and connectivity before treating it as complete.

Best practices & tips

- Treat My tasks as your single to-do list; avoid keeping a parallel spreadsheet.
- If a task isn't yours, reassign it in the source record rather than leaving it open.
- A task closed without evidence is not done — attach the proof in the source record.

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My approvals (Approval Center)

The Approval Center is the single queue for every record waiting on a signature. Documents, CAPAs, change orders, suppliers, risks, training records, inspections and customer complaints all raise an approval request into the same list. Every decision is signed with your password and a written reason, and is stored as a tamper-evident electronic signature alongside the audit trail.

Where to find it: Sidebar › Workspace › **My approvals**. The bell (top right) also links to new approval requests.

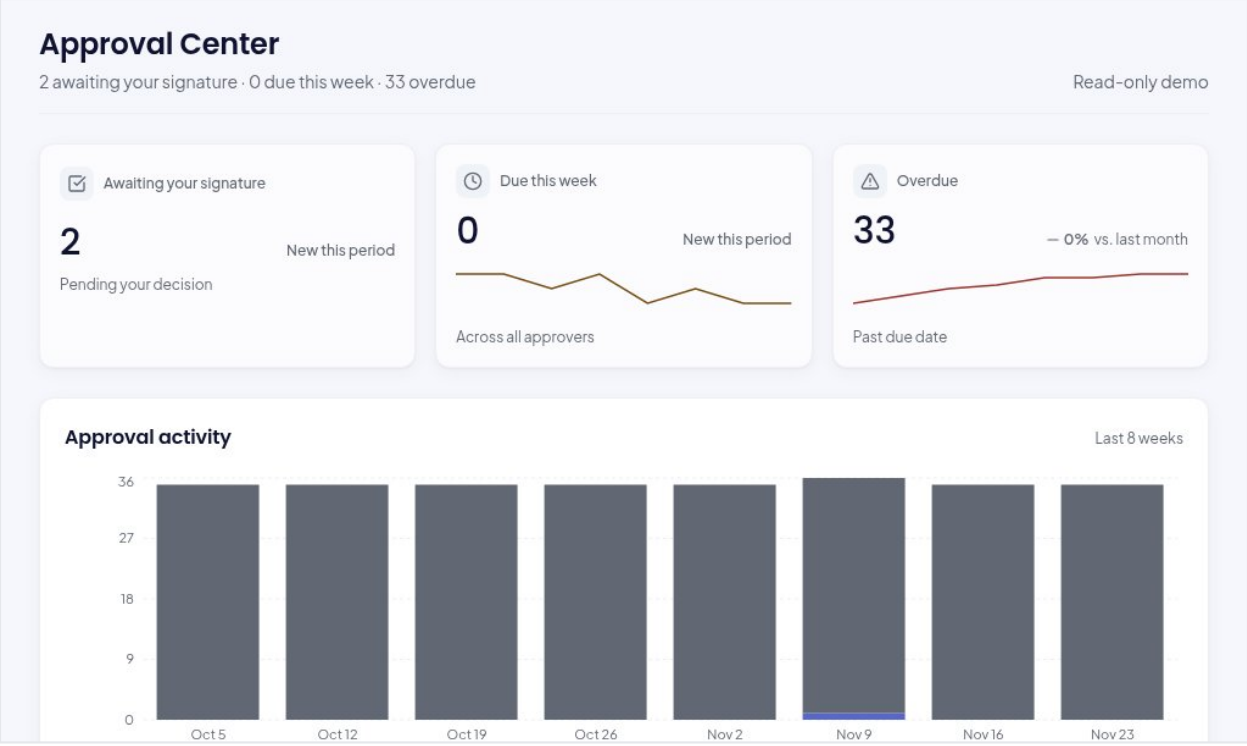


Figure — The Approval Center lists every record waiting for your signature.

> **Note.** New approval requests always start as Pending. Only a password-signed decision can approve or reject one — a request can never be created already approved.

Set up

1. Grant access. Under *Admin settings › Roles & abilities*, give each role the approval abilities it needs: approvals.view (see the queue), approvals.act (sign decisions), approvals.bulk (decide several at once), approvals.delegate (hand approvals over while away), approvals.manage_rules (standing rules), and approvals.manage_escalation (escalation settings).
2. Set the escalation policy. Under *Admin settings › Notifications*, choose the escalation contact, the number of working days after which an overdue approval escalates, and the

workspace timezone.

3. Decide what may never be auto-approved. Critical records and records flagged for segregation of duties, required e-signature, missing evidence, stale review or over-scope are held out of bulk decisions; review them individually. The server rechecks eligibility.

Day-to-day use

1. Open *Workspace › My approvals*. The cards at the top show what is awaiting your signature, what is due this week, and what is overdue.
2. Narrow the queue with the filter chips — record type, plant, owner, priority, age, due date and policy flags. Filters live in the page address, so a filtered queue can be bookmarked or shared.
3. Select a row to open the review panel: requester, record summary, approver chain, attachments, previous signatures and comments. Use the arrow keys to move between requests and Escape to close.
4. **Approve**, **Reject** or **Delegate** from the panel. Enter a reason and your password; the meaning of the signature is shown and cannot be edited. The source record advances automatically.
5. Clear routine batches by ticking two or more rows and choosing bulk approve or bulk reject. One reason and one password cover the batch; each record still gets its own signature with a shared batch reference. Ineligible records are listed as skipped. Approval batches support up to 200 requests; source-module bulk actions need their own workflow ability, not only approvals.bulk.
6. Before planned absence, create a delegation under *Admin settings › My delegations* (**New delegation**). New approvals go to your delegate for up to 60 days.

Standing rules

Standing rules (*Admin settings › Standing approval rules*) auto-approve narrowly defined, low-risk requests for a bounded period. A rule names the record type, scope and an expiry no more than 90 days out. Rules cannot cover critical record types and cannot be edited — use **Revoke rule** and recreate. Every automatic approval still produces a signature attributed to the rule and an audit entry.

> **Watch out.** Confirming your password signs you out of nothing else — other devices stay signed in. If you are asked for your password unexpectedly, check you are on your company's ClarityQMS address.

Best practices & tips

- Write reasons a future auditor can read on its own — the record code alone is not a justification.
- Keep approvals.act narrow and approvals.view wide: most people need to see progress, few need to sign.
- Treat a growing overdue count as a resourcing signal, not an administrative nuisance.

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- Give standing rules the shortest sensible life; a rule that keeps being recreated is a process to redesign.
- Always set a delegate before planned absence — escalation is a safety net, not a plan.

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Calendar & Notifications

The calendar overlays every scheduled QMS event — document reviews, audits, training, calibrations, compliance reviews, inspections and CAPA due dates — colour-coded by module. The notification bell surfaces items assigned to you and manager escalations for overdue items.

Where to find it: Sidebar › Workspace › **Calendar**; notifications are the **bell** icon at the top right of every page.

Set up

1. In *Admin settings › Notifications*, choose which events trigger notifications, at what lead time, and the digest cadence.
2. Configure manager escalation rules — typically 7 days overdue.
3. Each user can fine-tune their own preferences from their profile.

Day-to-day use

1. Filter the calendar by module or department to focus on your area.
2. Click any event to jump straight to the source record.
3. Act on notifications from the bell menu; clearing without action leaves the underlying item overdue.

Best practices & tips

- The calendar is your leading indicator. If next month is empty, plan work in.
- Never dismiss a notification without addressing the underlying record.
- Set a personal rhythm — Monday for the week's calendar, daily for notifications.

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Documents

The Documents module (*Document & Change*) manages your controlled document lifecycle — SOPs, work instructions, forms, manuals — from draft, through review and approval, to retirement.

Where to find it: Sidebar › Document & Change › **Documents** › **+ New document** (blue button, top right of the page).

Watch out. Never edit an approved document in place. Revise it — the system bumps the revision and preserves history.

Set up

1. Decide your document numbering scheme (e.g. QMS-SOP-001) and record it in a top-level Quality Manual. Record codes are allocated automatically per year.
2. Decide who approves each document type and give them approvals.act under *Admin settings › Roles & abilities*.
3. Load existing controlled documents in bulk from *Admin settings › Data import*, mapping title, owner and current revision.
4. Enable the **document approaching review date** notification so owners are reminded 30 days out.

Day-to-day use

1. Open *Document & Change › Documents* and click **+ New document** at the top right of the page (see the figures below). The button appears only for roles with document edit access; read-only demo visitors do not see it.
2. In the **New document** dialog, enter **Doc number** (for example SOP-014) and choose **Type** (SOP, WI, Form, Policy and so on).
3. Enter a clear **Title**.
4. Choose the **Plant** (or All plants for a company-wide document) and, optionally, the **Department**.
5. Optionally use **Attach initial file** to upload the SOP, form or drawing now (PDF, Word, Excel or image). It is saved as the first controlled revision file. You can also attach it later with **Edit revision**.
6. Click **Create document**. The document opens as a **draft**. If the upload fails, the draft is kept and you can retry the upload from the same dialog without creating a duplicate.
7. On the document page, check the owner, next review date and file, then submit for review; the approver signs the request in My approvals.
8. Once approved, the document is released and the previous revision is retired automatically.

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9. To release several approved revisions at once, tick them and choose the bulk release action. One password signs the batch; documents without a verified approved revision are skipped and listed.
10. Retired documents remain searchable — never delete them, they are your audit trail.

Best practices & tips

- Keep titles action-oriented ("Handling non-conforming product") rather than abstract.
- Set review cycles proportional to risk: 1 year for critical SOPs, 3 years for low-risk forms.
- Attach the source (.docx) file, not just the PDF, so future revisions don't require re-typesetting.
- Owner ≠ author. The owner is accountable for the content being correct.

Step by step: create a new document

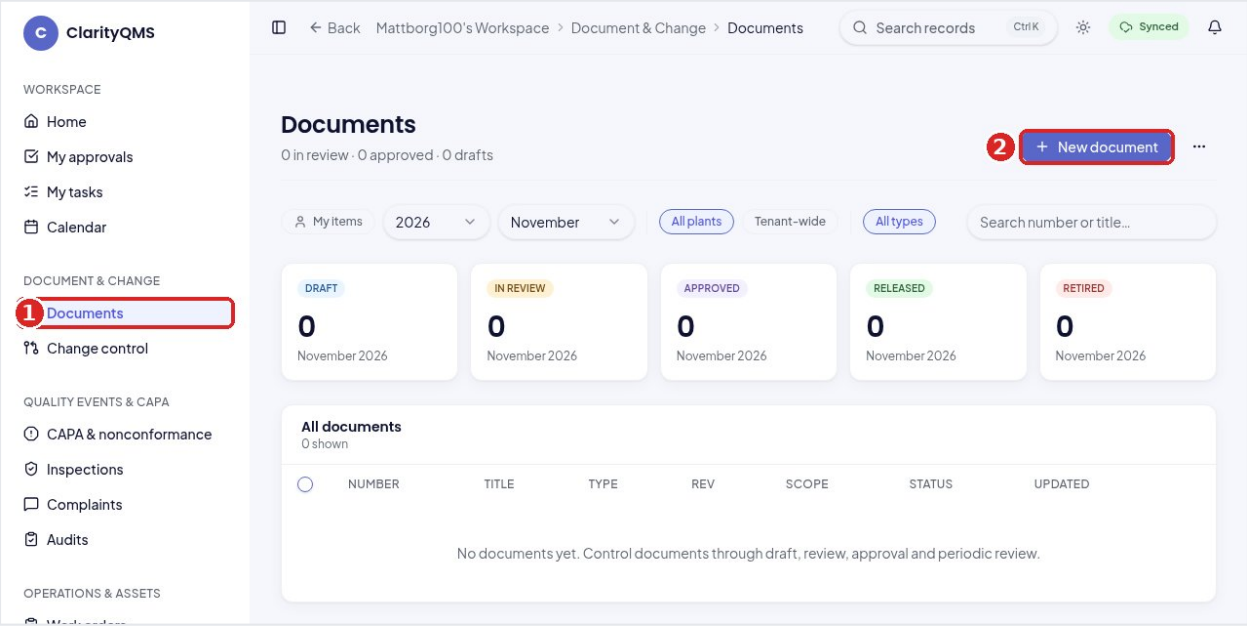


Figure — (1) Sidebar › Document & Change › Documents. (2) The blue + New document button at the top right of the page header.

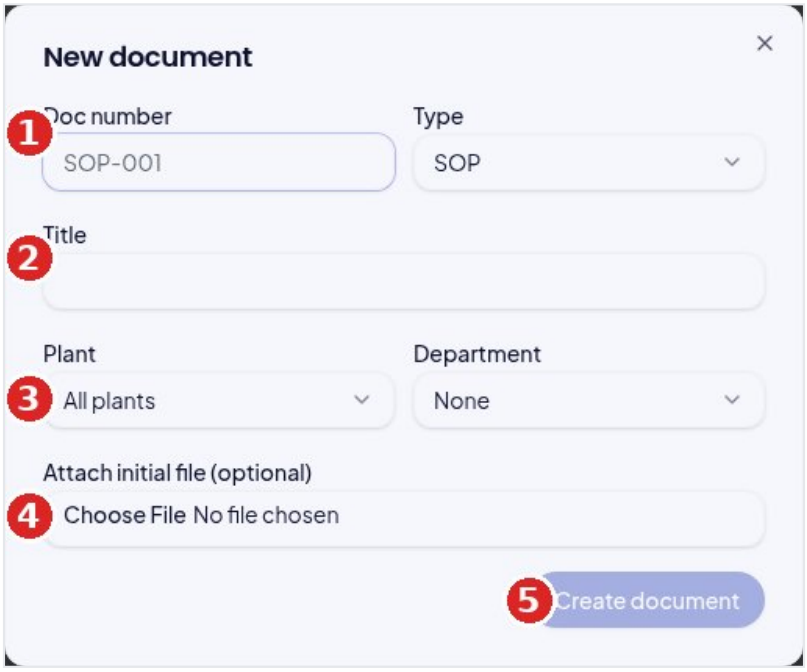


Figure — The New document dialog: (1) Doc number and Type, (2) Title, (3) Plant and Department, (4) Attach initial file (optional), (5) Create document.

> **Tip.** The Document control tab on *Insights & Reviews › Dashboards* also has a **+ New document** shortcut that opens the same dialog.

Document page, approval trail and revisions



Figure — Document page. (1) Approval trail — who approved the document and whether the approval came from a signed request or a completed workflow. (2) Revisions — every saved snapshot.

- **Approval trail** records each status change from now on: the person, the time, the old and new status, and the source (*Signed request* or *Completed workflow*). Entries cannot be edited or deleted. Approvals made before this feature existed are not back-filled.
- **Revisions** lists permanent snapshots of metadata and file. Use **Preview this version**, **Download revision** or **Compare with…**.

Controlled revisions, files and comparisons

1. Open a document from Documents to view **Revisions**. Choose **Preview this version** or **Download revision** on the required snapshot; check its revision label and time.
2. PDFs and supported images preview inline. Word and other formats use **Download to view**. A metadata-only revision may show **No file attached to this version**; do not assume its original file exists.
3. Choose **Compare with…** to compare revision snapshot fields, then export the comparison PDF where offered. This compares metadata/file references (title, owner, dates, location, type, status, revision and file size), not PDF/Word paragraph redlines.
4. Where **Edit revision** is offered, revise the editable metadata and attach a new version file before saving. Another user's intervening save requires a reload and review. Released records cannot be edited in place; use the permitted revision/release workflow.
5. Review **Signed release** evidence for the exact revision. Uploading, downloading or comparing a file does not release it. Saved revision snapshots and controlled version files cannot be overwritten or deleted.

> **Note.** A labeled **Sample attachment** is an illustrative fallback, not the original historical file and not evidence of a signed release.

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Change control

Change control (Engineering Change Order / ECO) governs any planned change to products, processes, documents or suppliers, running each change through a defined, signed approval chain.

Where to find it: Sidebar › Document & Change › **Change control** › **+ New change order** (top right).

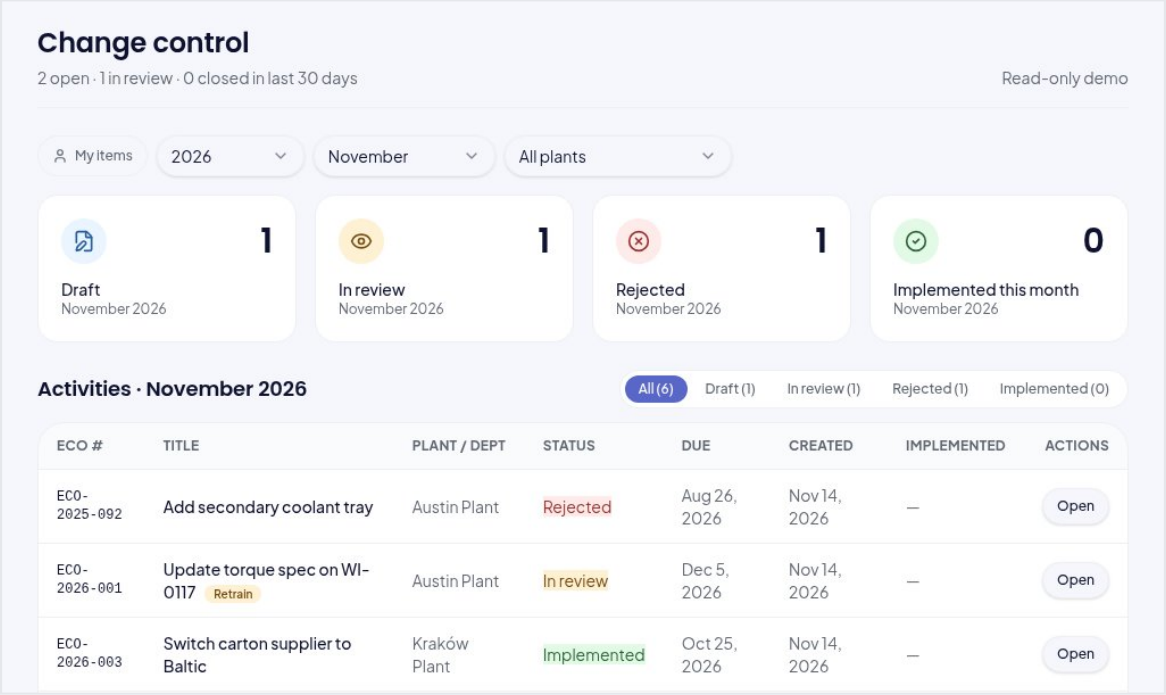


Figure — Change control list. Open a change order to see its approval chain and linked CAPA.

Set up

1. Define change categories (Minor, Major, Emergency) and the approvers required for each.
2. Give approvers approvals.act and confirm the chain in *Admin settings › Roles & abilities*.
3. Agree what counts as a change requiring an ECO — document it to avoid ambiguity.

Day-to-day use

1. Raise a **Change order** describing the current state, proposed change, reason and impact assessment.
2. The change routes through each approver in sequence. Every step is a password-signed decision in My approvals; an unsigned step cannot advance the change.
3. On full approval, execute the change (revise documents, retrain, update equipment). Use **create training** from the ECO to assign retraining to affected people.

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4. Close the ECO with evidence.

Best practices & tips

- Impact assessment is the most-skipped, most-important step. Consider quality, regulatory, safety, cost and supplier impact.
- No retroactive changes. Even emergency changes get an ECO, opened within 24 hours.
- Link the ECO to affected documents, training records and risks so the whole change lands together.

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CAPA & nonconformance

CAPA captures problems, contains them, finds the root cause, and tracks corrective and preventive actions through a verified effectiveness check to a password-signed closure. Each CAPA has its own workspace page; you can run it as a Standard CAPA or switch on the optional 8D method. Each record receives an automatic code such as CAPA-2026-012.

Where to find it: Sidebar › Quality Events & CAPA › **CAPA & nonconformance** › **+ New CAPA** (top right). Click a CAPA number to open its workspace.

Best practice. A good CAPA closes with evidence — data, retraining records or a revised SOP — not just a checkbox.

Set up

1. Agree the trigger threshold: which findings, complaints, failed inspections or NCRs must open a CAPA. Document it in an SOP.
2. Configure default owners per department under *Admin settings › Organization*.
3. Grant capa.edit to people who run CAPAs and the closure ability to those who may sign them closed. To create follow-ups, people also need change-control or training-assign access.
4. Enable manager escalation in *Admin settings › Notifications* so overdue CAPAs escalate after 7 days.
5. Optionally set automatic CAPA rules for repeated inspection failures in *Admin settings › Inspection rules*.

Day-to-day use

1. Open *Quality Events & CAPA › CAPA & nonconformance* and click **+ New CAPA** (top right). Describe the problem, choose plant, severity, owner and due date, then save.
2. Click the CAPA number in the list to open its **workspace**. Work down the page section by section, as described below.
3. Use the **My items** chip, the year/month and plant filters, and the **Critical** / **Major** / **Minor** type chips to narrow the list.
4. Several verified CAPAs can be closed together with bulk close and one password signature; records lacking verification evidence are skipped.

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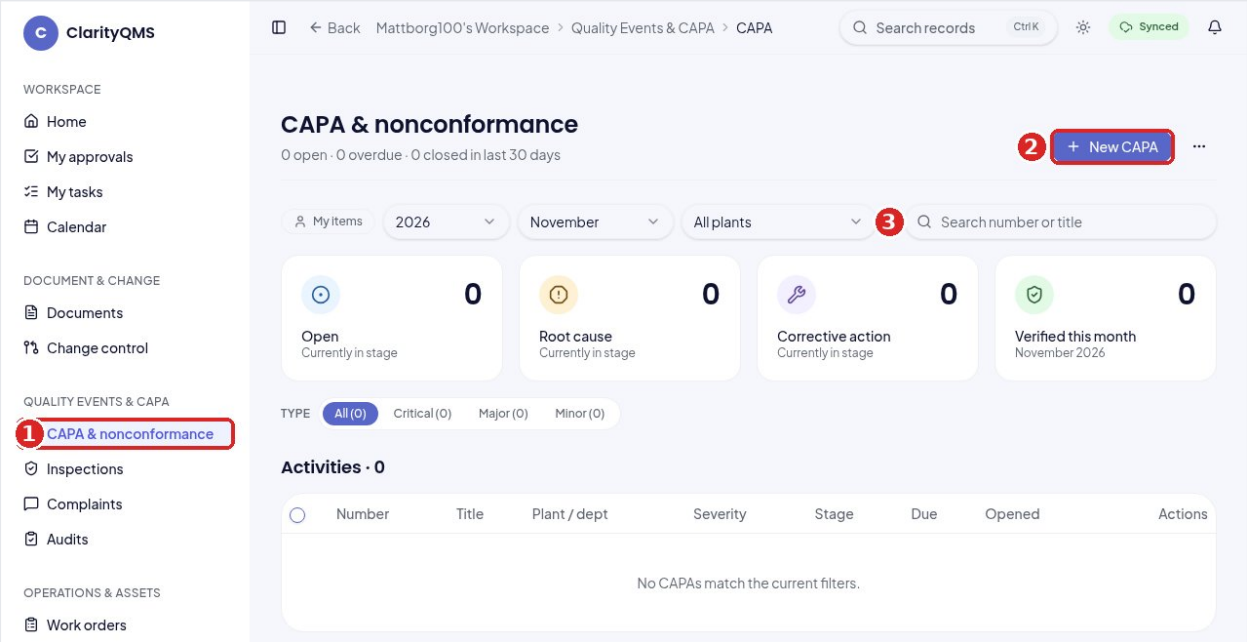


Figure — (1) Sidebar › Quality Events & CAPA › CAPA & nonconformance. (2) + New CAPA. (3) Search by number or title; the year, month and plant filters sit beside it.

The CAPA workspace — section by section

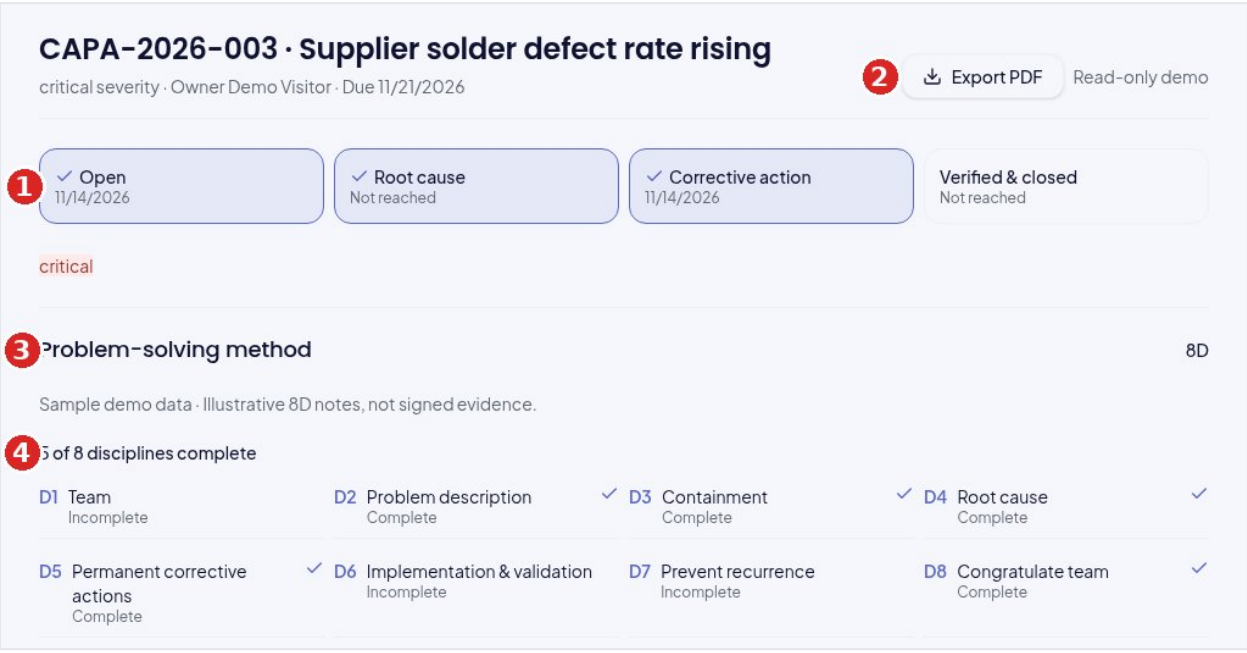


Figure — CAPA workspace header. (1) Stage progress: Open › Root cause › Corrective action › Verified & closed, with the date each stage was reached. (2) Export PDF. (3) Problem-solving method (Standard CAPA or 8D). (4) The 8D discipline grid when 8D is on.

1. **Header and progress bar** — shows code, title, severity, owner and due date. Each stage tile shows the date it was reached; the current stage is highlighted.

2. **Problem description** — a clear statement of what happened, where, and how much product is affected.
3. **Containment (immediate actions)** — add each quick action that protects the customer now (quarantine, sort, hold shipment). Choose the containment type, describe it, and record who and when. Remove an entry with the remove icon if it was added by mistake.
4. **Investigation** — root-cause analysis with the **Fishbone** (6M) editor and **5-Why**. Keep asking why until you reach a systemic cause.
5. **Action plan** — add **Corrective** and **Preventive** tasks, each with an owner and due date. Tasks appear in the owner's My tasks; their status moves Pending › In progress › Completed.
6. **Effectiveness check** — once actions are complete, use **Record check**: choose the method, write the evidence (for example 'no recurrence in 30 days of production'), and mark **Effective** or **Not effective**. A Not effective result keeps the CAPA open for more action.
7. **Linked follow-ups** — create a change order or assign retraining directly from the CAPA (see below).
8. **Closure signature** — with an effective check recorded, choose **Sign and close**, enter your reason and password. The CAPA moves to Verified & closed and the signature is stored permanently.

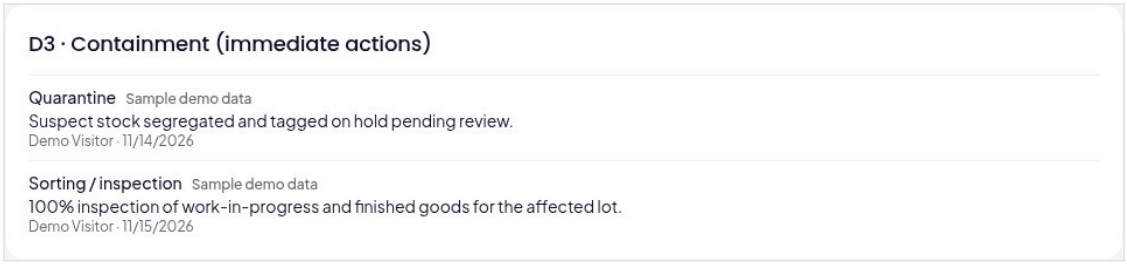


Figure — Containment section with recorded immediate actions.

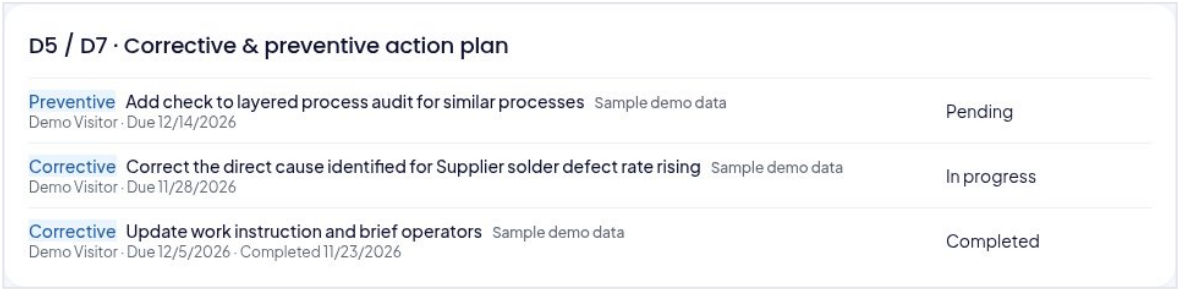


Figure — Action plan: corrective and preventive tasks with owner, due date and status.



Figure — Effectiveness check result.

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Figure — Closure signature. Demo records say 'Sample demo record' because no real password signature exists for them.

Using the 8D method

8D (Eight Disciplines) is a structured method often required by automotive and aerospace customers. It is optional and switched on per CAPA.

1. In the **Problem-solving method** section, switch from **Standard CAPA** to **8D**. The D1–D8 grid appears with a counter such as *5 of 8 disciplines complete*.
2. **D1 Team** — choose the cross-functional team members.
3. **D2 Problem description** and **D3 Containment** are filled from the problem description and containment sections — no double entry.
4. **D4 Root cause** comes from the investigation; also record the **Escape cause** (why the problem was not caught).
5. **D5 Permanent corrective actions** — the corrective tasks in the action plan, plus how the fix was validated.
6. **D6 Implementation & validation** — evidence the fix is in place and working.
7. **D7 Prevent recurrence** — preventive tasks and system changes (procedures, FMEA, training).
8. **D8 Congratulate team** — recognise the team. Each discipline shows a check mark when complete; save your changes before leaving the page.

> **Note.** If someone else saved the 8D notes while you were editing, you will be asked to reload and reapply your changes so nothing is overwritten.

Follow-ups: change orders and retraining from a CAPA

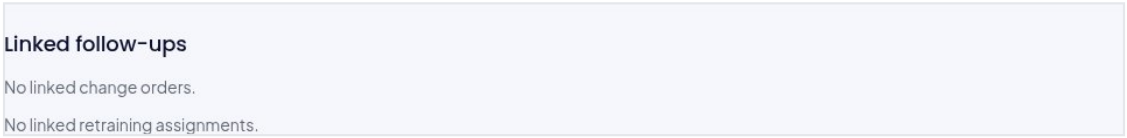


Figure — Linked follow-ups section on a CAPA.

1. In **Linked follow-ups**, choose **Create change order** to raise an ECO for a document, process or product change. Fill in the title and description and save; the ECO is linked back to this CAPA.
2. Choose **Assign retraining** to assign a course to the affected people with a **Due date**. Previous completions are preserved; the new assignment is linked to the CAPA.
3. Linked items are listed in the section with their status. On the change order or training record, a link takes you back to the originating CAPA.
4. Follow-ups cannot be created on a closed CAPA, and the source link cannot be changed later.

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Printable CAPA / 8D report

Click **Export PDF** at the top right of the workspace. The PDF includes the header, problem, containment, investigation, action plan, effectiveness check, follow-ups, closure signature and — when 8D is on — every discipline. Use it for customer 8D submissions and audit evidence.

> **Watch out.** Demo CAPAs are labelled **Sample demo data**. Their closures are illustrations, not password-signed approvals.

Best practices & tips

- Separate correction (fix this instance) from corrective action (fix the cause). Both belong on the record.
- Always record containment within 24 hours for customer-impacting problems.
- One root cause per CAPA. Multiple problems = multiple CAPAs.
- Use the CAPA & Problem Solving dashboard weekly to catch overdue tasks and CAPAs awaiting effectiveness review.
- Never blame an individual in the root cause field. Blame the system that allowed the error.

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Root cause tools — 5 Whys, Fishbone and 8D

Root cause tools help you find why a problem happened, not just what happened. ClarityQMS offers three: **5 Whys** for a quick, linear cause; **Fishbone** (Ishikawa, 6M) to explore causes under Man, Machine, Method, Material, Measurement and Environment; and **8D**, the eight-discipline method customers often require. 5 Whys and Fishbone can be started straight from a customer complaint, an inspection or a CAPA. When the cause is systemic, escalate to a CAPA or 8D in one step and the analysis is copied across.

Where to find it: Complaints › **Review** a complaint, or Inspections › open an inspection › **Root cause analysis** section › **Start 5 Whys** / **Start Fishbone**. On a CAPA, use the **Investigation** section.

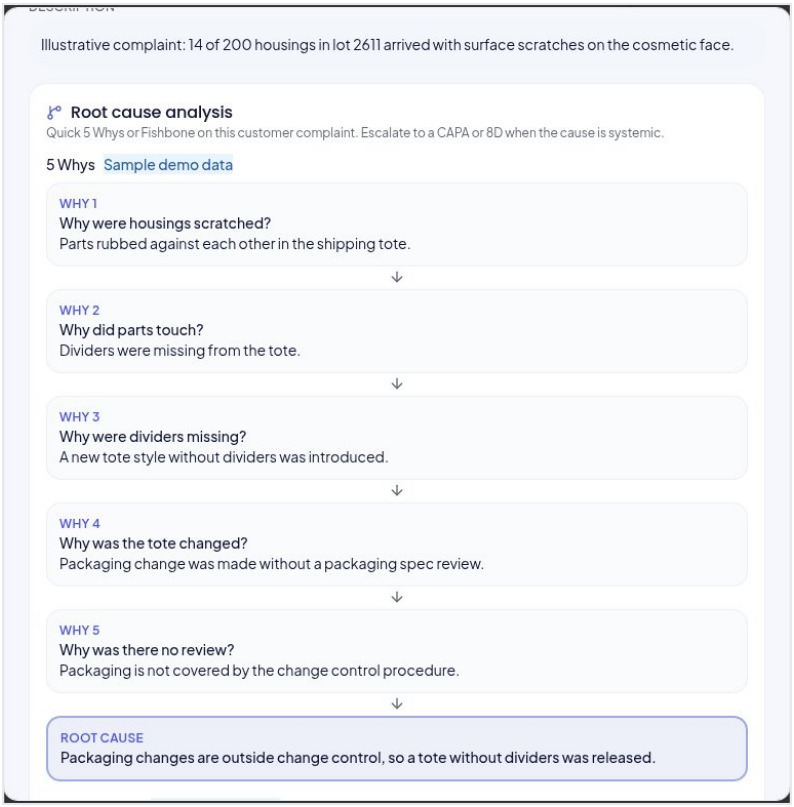


Figure — The Root cause analysis section inside a complaint, showing the 5-Why ladder. Read-only viewers see the diagrams; editors see Start/Edit buttons and Escalate to CAPA / 8D.

> **Best practice.** Which tool? Use **5 Whys** for a single, clear failure. Use **Fishbone** when several causes are possible. Escalate to **8D** for customer complaints, repeat failures or when a customer asks for an 8D report.

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Set up

1. Grant **capa.edit** to people who may run analyses, and **capa.create** to those who may escalate to a CAPA or 8D. Viewers with **capa.view** can read the diagrams.
2. Agree in your CAPA SOP when an analysis must be escalated, for example any customer complaint rated major or critical, or any inspection that fails twice.

Day-to-day use

1. Open the source record: *Complaints › Review* on a row, an inspection from *Inspections*, or a CAPA workspace.
2. In **Root cause analysis**, click **Start 5 Whys** or **Start Fishbone**. Fill in the steps or causes and click **Save analysis**. Each record holds one 5 Whys and one Fishbone; reopen them with **Edit**.
3. When the cause needs corrective action, click **Escalate to CAPA / 8D**. Enter the CAPA title and severity, tick **Use the 8D method** if needed, then click **Open CAPA** or **Open 8D** .
4. ClarityQMS opens the new CAPA. Its Investigation section already shows your analysis, and the complaint or inspection shows a link to the CAPA.

On a customer complaint

The **Root cause analysis** section sits inside the complaint review window, below the description (shown above). The complaint keeps its own status and notes.

On an inspection

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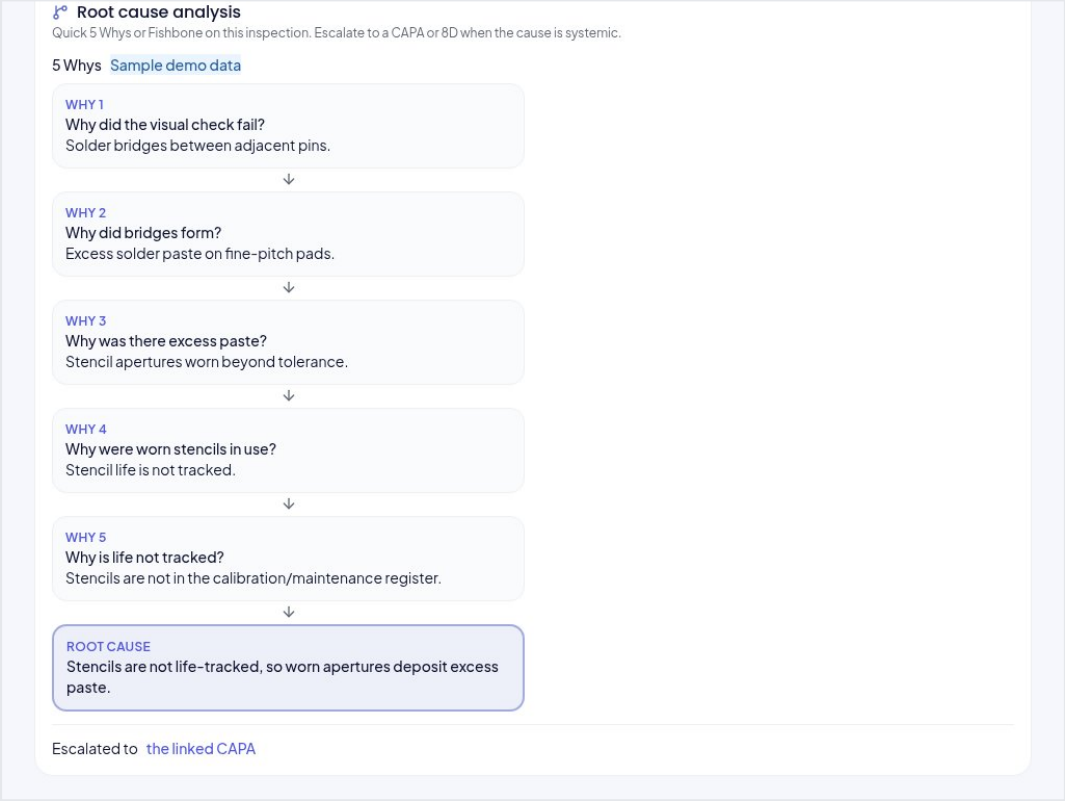


Figure — Inspection page: Root cause analysis below the passing-items bar. The signed inspection evidence is never changed.

On a CAPA

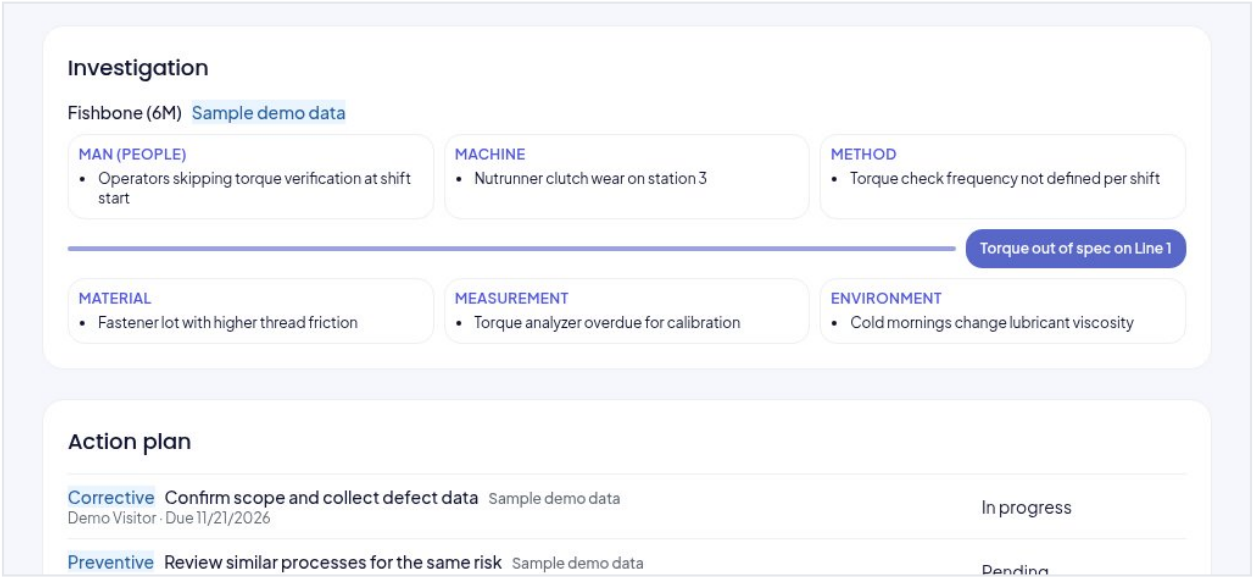


Figure — CAPA Investigation section with the visual Fishbone: the six cause categories around the problem.

Analyses escalated from a complaint or inspection also appear on the CAPA, labelled *from customer complaint* or *from inspection*.

Finding 8D investigations

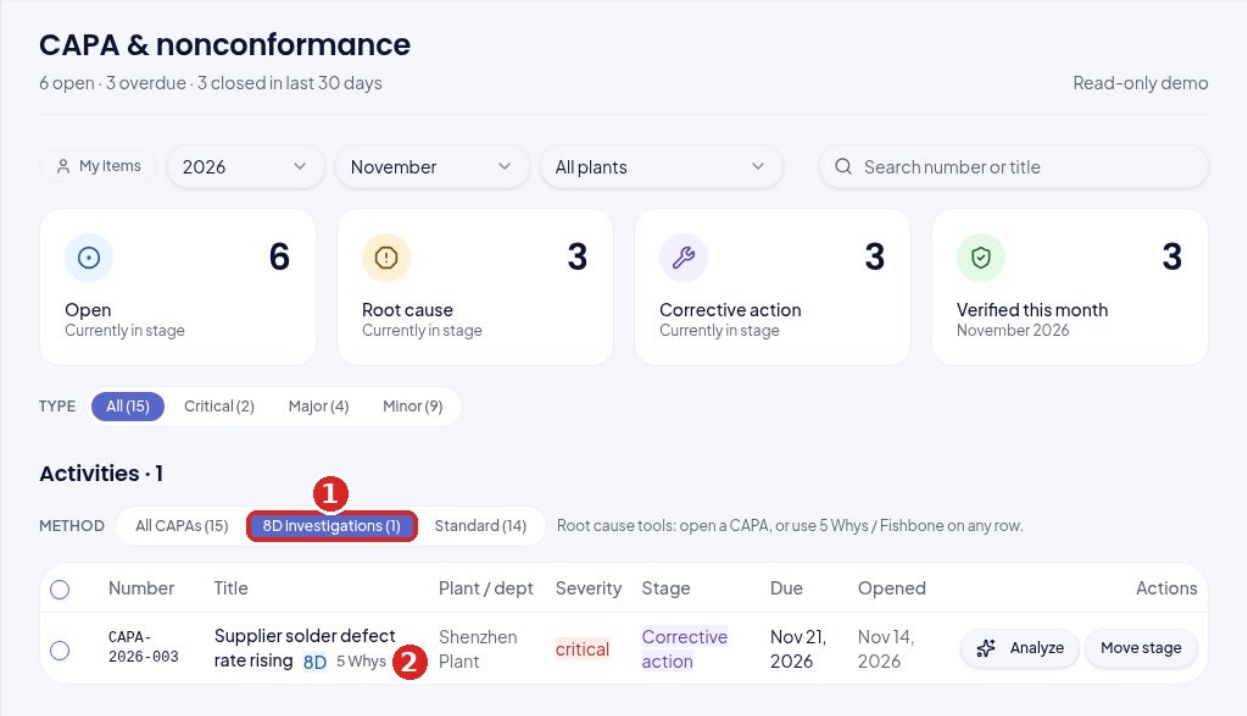


Figure — CAPA list: (1) Method filter — All CAPAs, 8D investigations, Standard. (2) The 8D badge and the analysis type beside the title.

Dashboard

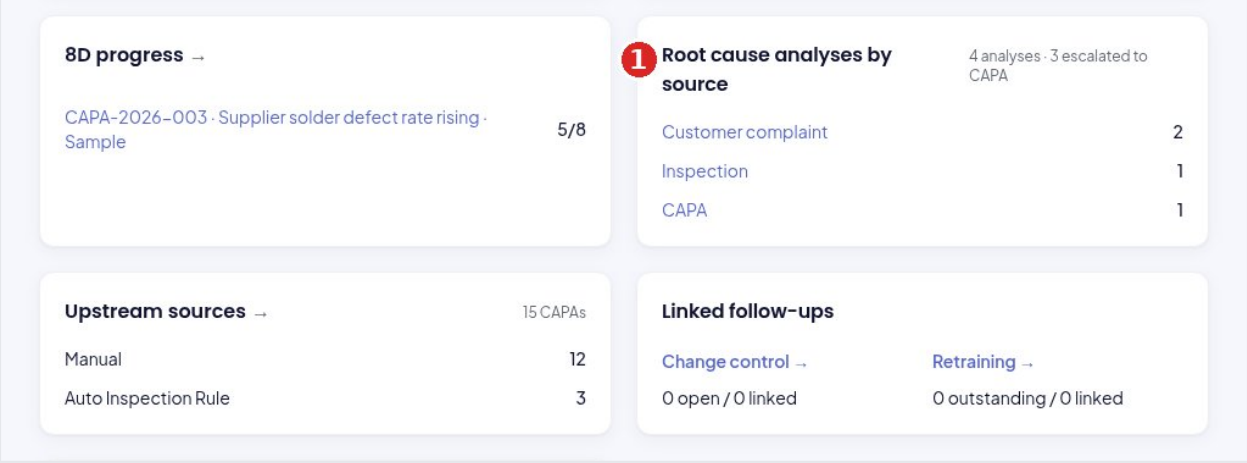


Figure — CAPA & Problem Solving dashboard: (1) Root cause analyses by source, with how many were escalated to a CAPA.

> **Watch out.** An escalation can be done once per analysis; clicking again opens the same CAPA. Demo analyses are labelled **Sample demo data** and cannot be edited.

Best practices & tips

- Stop asking why when you reach a cause you can control and fix.
- List every plausible cause on a Fishbone first, then test them with data before choosing one.
- Never name a person as the root cause; name the process gap that allowed the error.
- Run a quick 5 Whys on the complaint within 24 hours, then escalate to 8D if the customer needs a formal response.

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Complaints

Complaints captures customer feedback from two doors: a public intake form your customers can use without an account, and the staff queue at *Quality Events & CAPA › Complaints* where your team triages, investigates and responds.

Where to find it: Sidebar › Quality Events & CAPA › **Complaints** › **Review** on a row. Root cause tools are inside the review window.

> **Note.** The public form is reached only through your workspace's private intake link. Customers never see your queue or other customers' complaints.

Set up

1. Grant capa.view (and create/edit as needed) to the people who handle complaints.
2. Copy your intake link from the Complaints page and publish it on your website, order confirmations or packing slips.
3. Agree response-time targets (for example acknowledge in 1 working day, respond in 10).

Day-to-day use

1. New complaints from the public form land in the queue automatically; staff can also click **Log complaint** from Home for phone or email complaints.
2. Open a complaint, record the product, lot, severity and customer details, and assign an owner.
3. Investigate. If the cause needs systemic action, open a CAPA directly from the complaint so the two stay linked.
4. Record the response sent to the customer, update the complaint status (for example **Under investigation** or **Resolved**) and save. The staff complaint editor is a status/triage workflow, not a password-signed closure dialog.

Best practices & tips

- Log every complaint, even ones you think are invalid — trends only work with complete data.
- Thank the customer and acknowledge quickly; resolution can take longer than acknowledgement.
- Review complaint categories at every Management review.

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Audits

The Audits module schedules internal and external audits, assigns auditors, runs the audit via a checklist (online or offline), and logs findings that can spawn CAPAs.

Where to find it: Sidebar › Quality Events & CAPA › **Audits**.

> **Tip.** Offline mode is your friend for shop-floor audits. Open the audit before you leave your desk; it syncs when you're back online.

Set up

1. Build your question bank under *Admin settings › Audit questions*, tagged by standard clause (e.g. ISO 9001 §8.5).
2. Create an annual audit programme covering every process at least once per year.
3. Assign qualified auditors — someone independent of the area being audited.

Day-to-day use

1. From **Audits**, click **New audit** and choose scope, auditor and date.
2. On the day, open the audit and tap **Conduct**. Findings sync when connectivity returns.
3. For each question, choose **Pass**, **Minor**, **Major**, **Critical** or **N/A**, and add the available evidence.
4. Review significant findings and create a linked CAPA through the available CAPA workflow; do not assume every finding row offers a conversion button.
5. Enter **Overall finding summary** and choose **Complete audit**. Confirm synchronization before leaving; completion is not a separate publish-and-email action.

Best practices & tips

- Audit the process, not the person. Ask "show me how you do X".
- Sample records at random — don't let the auditee pick the file.
- Close every finding within the agreed timeframe.
- Rotate auditors annually to avoid blind spots.

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Inspections

Inspections replaces paper check sheets. Inspectors run versioned checklists against a work order or production stage, capture measurements and photos (online or offline), and close the inspection with a password signature. Failures can open CAPAs automatically.

Where to find it: Sidebar › Quality Events & CAPA › **Inspections**. Open an inspection and use **Export PDF** (top right) for a printable report; the **Root cause analysis** section sits below the header.

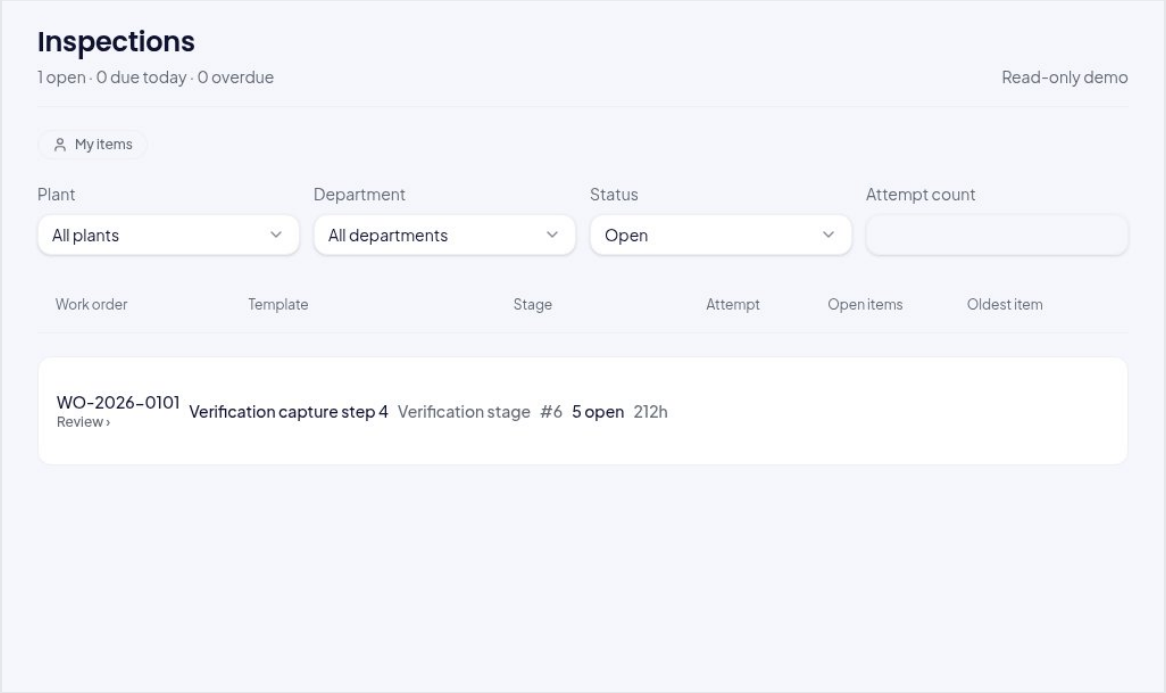


Figure — Inspections list with status filters. Click an inspection code to run or review it.

> **Note.** Inspection results are permanent evidence. Answers, attempts and closures can't be edited or deleted after submission — a correction is recorded as a new attempt.

Set up

1. Create checklists in *Admin settings › Inspection templates*: add questions (pass/fail, numeric with limits, text, photo), mark critical questions and save. Each save creates a new version; inspections already started keep their original questions.
2. Optionally link templates to production stages in *Admin settings › Routings* so inspections open automatically when a work order reaches that stage.
3. Set automatic CAPA rules in *Admin settings › Inspection rules* — for example open a CAPA when a critical question fails three times in 24 hours at one plant.
4. Give inspectors the Inspector role (or inspections abilities) scoped to their plant.

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Day-to-day use

1. Open *Quality › Events › Inspections* or tap **Start inspection** on Home. Use **Scan work order** to pick the job by barcode.
2. Answer each question. Numeric answers are checked against limits immediately; attach a photo where required.
3. Choose **Submit attempt #…**. If offline, the message **Attempt saved on this device · waiting to sync** means it is not yet server evidence. If items fail, fix and re-inspect; each submission creates a new attempt.
4. When all items pass, reconnect, confirm every pending attempt has synced, then choose **Close inspection** and confirm with your password. Closure is unavailable offline or while attempts are pending.
5. Use the Inspections dashboard (Dashboards › Inspections) to see first-pass yield, open items and oldest item by plant and template. The activity view shows the audit history of each inspection.

> **Watch out.** If you work offline and someone else changed the same inspection, ClarityQMS asks you to review the conflict before saving. Read both versions — never just overwrite.

Best practices & tips

- Keep checklists short and specific; ten good questions beat forty vague ones.
- Mark only truly critical questions as critical, so automatic CAPAs stay meaningful.
- Photograph the failure, not just the part — context helps the investigation.
- Review the oldest open item every shift; ageing failures hide real risk.

Inspection detail PDF report

1. Open the saved inspection detail. Choose **Export PDF**; wait for Preparing PDF, then use **Download PDF** when offered.
2. The printable report includes caller-visible saved inspection information, checklist responses, current findings and findings history. Unsaved/offline answers and signing secrets are excluded; photos are referenced rather than embedded.
3. Open the downloaded PDF and review the inspection code, location and evidence before printing or sharing. Exporting never signs or changes the inspection; read-only demo visitors may view/export without saving actions.

> **Note.** If the inspection list cannot load, use its retry action. A failed read is not an empty inspection list.

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Risk register

The risk register applies FMEA: each failure mode is scored for Severity, Occurrence and Detection, giving a Risk Priority Number (RPN) that drives mitigation.

Where to find it: Sidebar › People & Governance › **Risk register**.

Set up

1. Agree your 1–10 scoring scales for S, O and D and document them.
2. Set an action threshold (for example RPN ≥ 100 or Severity ≥ 9).
3. Assign a process owner to each area.

Day-to-day use

1. Add a risk using **Title**, **Category**, **Description**, location, **Severity**, **Occurrence**, **Detection** and **Next review**. Include failure-mode context and existing controls in the description.
2. Score S, O and D; the RPN calculates automatically.
3. For high-RPN items, define a mitigation action with owner and due date — it appears in notifications and on the Risk dashboard.
4. Review the displayed scores and mitigation evidence after completion. The current detail screen does not provide a dedicated re-scoring control; document reassessment through the authorized process rather than assuming the status dropdown changes RPN.

Best practices & tips

- Do FMEA with the process owner, not to them.
- Severity almost never changes — you can reduce likelihood or improve detection.
- If every score is 7, the scale isn't discriminating.
- Review the register at every Management review; new products or changes should trigger a new FMEA.

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Work orders & routings

Work orders track each production job through its routing — the ordered list of stages it must pass. Stage advancement is controlled, so a job can't skip a required inspection without a recorded exception.

Where to find it: Sidebar › Operations & Assets › **Work orders**.

> **Note.** Work orders, routings and products are set up under *Admin settings › Quality system setup*.

Set up

1. In **Products**, add each product with its default routing.
2. In **Routings**, define the ordered stages (e.g. Cut, Weld, Paint, Final inspection) and attach inspection templates to the stages that need them.
3. Load open jobs with **Import work orders** (CSV), or create them one by one. Plants in the file are matched by exact plant name.
4. Grant work_orders abilities to planners and supervisors.

Day-to-day use

1. Click **New work order**, enter the production order, product, quantity, plant and due date. A work order code is assigned automatically.
2. Open the work order to see its stages. Advance it when a stage is complete; required inspections open automatically.
3. If a stage must advance before its inspection passes, review the **Stage advancement exception** prompt that states how many inspections remain open and asks **Proceed anyway?**. Advance only with the required authority; the exception is logged.
4. Use **Scan work order** on the shop floor to jump straight to the job.

Best practices & tips

- Keep routings realistic — a stage that is always skipped should be removed, not excepted.
- Review exceptions weekly; frequent exceptions point to bottlenecks.
- Use the same work order code on the traveller paperwork so scanning always works.

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Training and competency matrix

Training assignments track employee/course work; the competency matrix compares accessible employees with required courses and immutable completion history. Requirements and individual assignments are different records.

Where to find it: Sidebar › People & Governance › **Training** › **Matrix** tab.

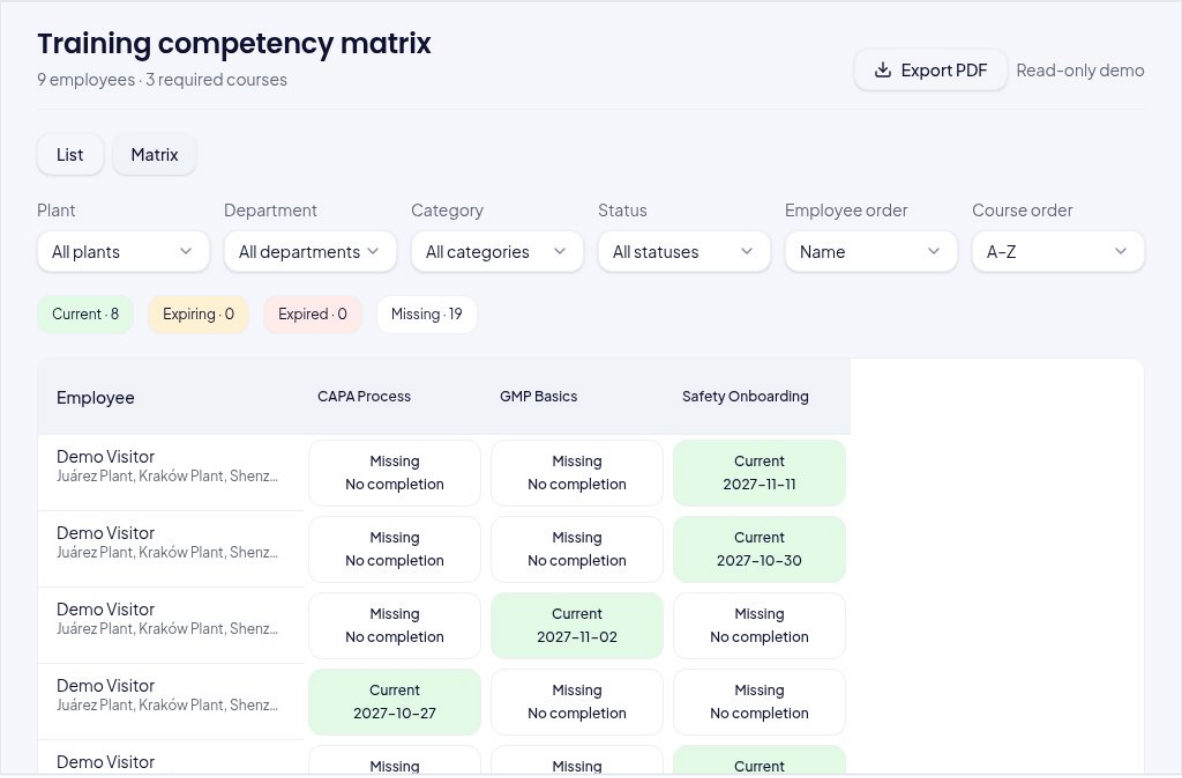


Figure — Competency matrix: each cell shows Current, Expiring, Expired or Missing. Click a cell for its history.

> **Note.** A matrix cell is Current, Expiring, Expired or Missing. Expiring means due within 30 days. Grace is shown separately and does not delay the Expired status.

Set up

1. Create the courses and employee profiles needed by your training programme. Grant training.view to readers and training.edit to authorized coordinators.
2. From **Training**, choose **Matrix**. In the requirements manager, add a course requirement, optionally restricted by role, plant and department, with recurrence in calendar months and grace days.
3. Recurrence accepts 1–120 months; grace accepts 0–365 days. Overlapping requirements use the shortest interval and grace. Requirements can be added or removed; use the

offered controls rather than assuming an edit-in-place form.

4. For an individual task, choose **Assign training** on the list and select **Employee**, **Course**, **Plant**, **Department** and **Due**. This form assigns one employee; role requirements belong in the matrix.

Day-to-day use

1. Switch between **List** and **Matrix** as needed. Filter and sort the matrix by employee/course and the offered location, role, department or status controls.
2. Click an employee/course cell to see completion history and the linked assignment. Review the evidence before recording another completion.
3. With edit permission and satisfied MFA, log the real completion date and supporting details. Future dates are rejected; do not record unperformed training. Completion history is permanent.
4. The next recurring date is calculated in calendar months from the latest completion. Legacy assignments without a matching requirement use a 12-month fallback; this does not invent prior completions.
5. Use **Export PDF** for a branded matrix with the selected filters, and review the output before distributing it. History views show up to 200 completion events.

Best practices & tips

- A qualified coordinator may record genuine attended training on behalf of an employee; never equate that permission with proof that training occurred.
- Reading an SOP is awareness, not necessarily demonstrated competence. Retain assessments or attendance evidence where your process requires them.
- Review Missing and Expired cells regularly; distinguish a missing requirement/assignment from a missing actual completion.

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Suppliers & Supplier Portal

The supplier module manages your approved supplier list, scorecards and supplier-facing CAPAs. Provisioned supplier contacts can log into a dedicated portal to view their scorecards, attributed CAPAs and shared document listings. The current portal is a read-only overview, not a CAPA response editor.

Where to find it: Sidebar › Operations & Assets › **Supplier quality**. Click a supplier name for its scorecard.

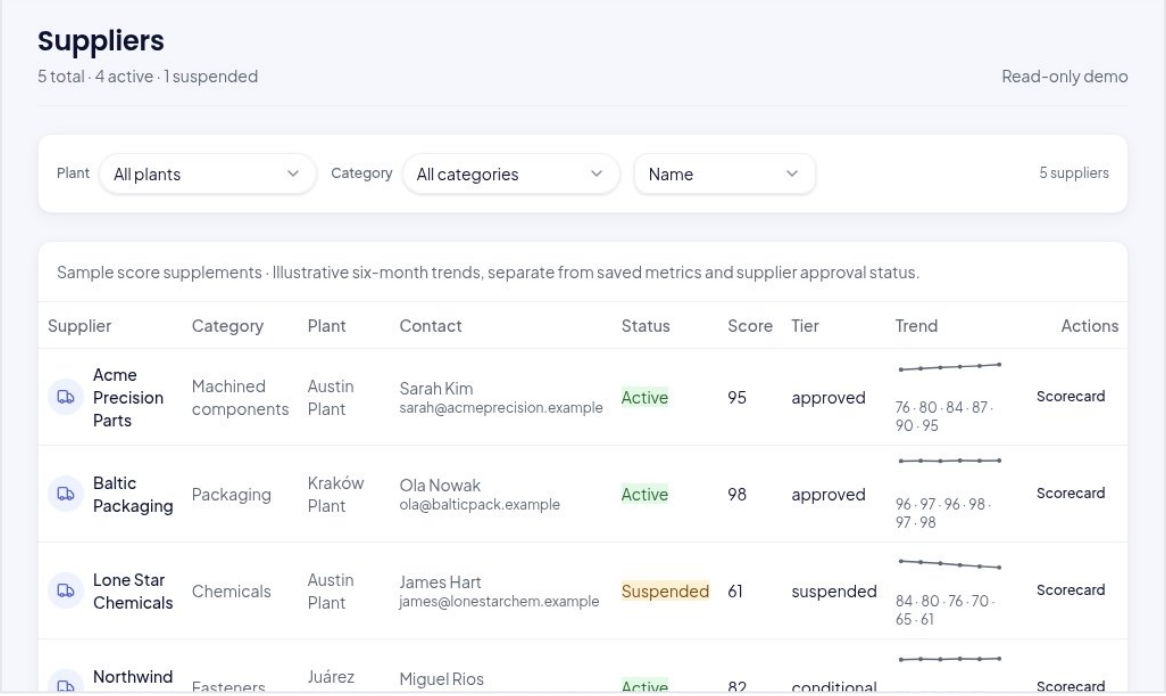


Figure — Supplier list with composite score and tier.

> **Note.** Supplier portal users are isolated: they only see records your company explicitly shared with them.

Set up

1. Import your Approved Supplier List with name, category, contact, approval date and re-evaluation date.
2. Open *Admin settings › Supplier scorecard* to configure **Quality**, **Delivery** and **Responsiveness** weights and thresholds; see the detailed workflow below.
3. Ask the workspace administrator to confirm that supplier access has been provisioned before directing a contact to the Supplier portal sign-in. Do not assume that an internal supplier record creates an external login.

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Day-to-day use

1. Log incoming quality issues as supplier CAPAs; the supplier can review the attributed CAPA in the portal when access is provisioned; internal staff record the response and evidence.
2. Share documents (drawings, specifications) with a supplier from the supplier page.
3. Update scorecards monthly or quarterly using inspection, delivery and complaint data.
4. Re-evaluate suppliers using score trends and evidence. A computed tier is not actual approval status; suspension and clearance use a password-signed decision.

Best practices & tips

- A supplier's score should be visible to them. Transparency drives improvement.
- Escalate scores that trend down two periods in a row.
- Keep supplier records after de-approval — they are evidence of qualification.

Composite supplier scoring — setup and use

1. In **Supplier scorecard settings**, set **Quality weight**, **Delivery weight** and **Responsiveness weight**. Defaults are 0.50, 0.30 and 0.20; fractions must sum to 1. Set **Approved minimum** and **Conditional minimum** (defaults 85 and 70). Choose whether to **Flag low scores for signed suspension review**, then **Save and recompute**.
2. Open a supplier detail and enter its actual monthly quality, delivery and response-time metrics using the offered metric form. Missing inputs remain unscored rather than being filled with assumed values. Responsiveness is scored as 100 minus two points per response hour, with a floor of zero.
3. Review **Composite score**, the component scores/weights, monthly trend and **Metric history**. Use **Recompute scores** after input or configuration changes where offered.
4. A low result displays **Below threshold — review required**. It can request signed review but never suspends the supplier automatically. With the required management permission, choose **Suspend manually** or **Clear suspension**, enter **Reason** and **Confirm password**, then **Sign and save**.
5. **Request CoA** opens an email request; it does not prove a certificate has been received. **Open supplier audit** opens the Audits queue, not a newly created/pre-filled audit.

> **Note.** Demo score supplements and six-month trends are labeled illustrations. They do not change saved monthly metrics, actual approval status or signed history.

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Equipment & calibration

The equipment module tracks measuring and monitoring devices, their calibration history and next due date. Equipment status updates automatically from calibration results.

Where to find it: Sidebar › Operations & Assets › **Equipment & calibration** › open an instrument › **Log calibration**.

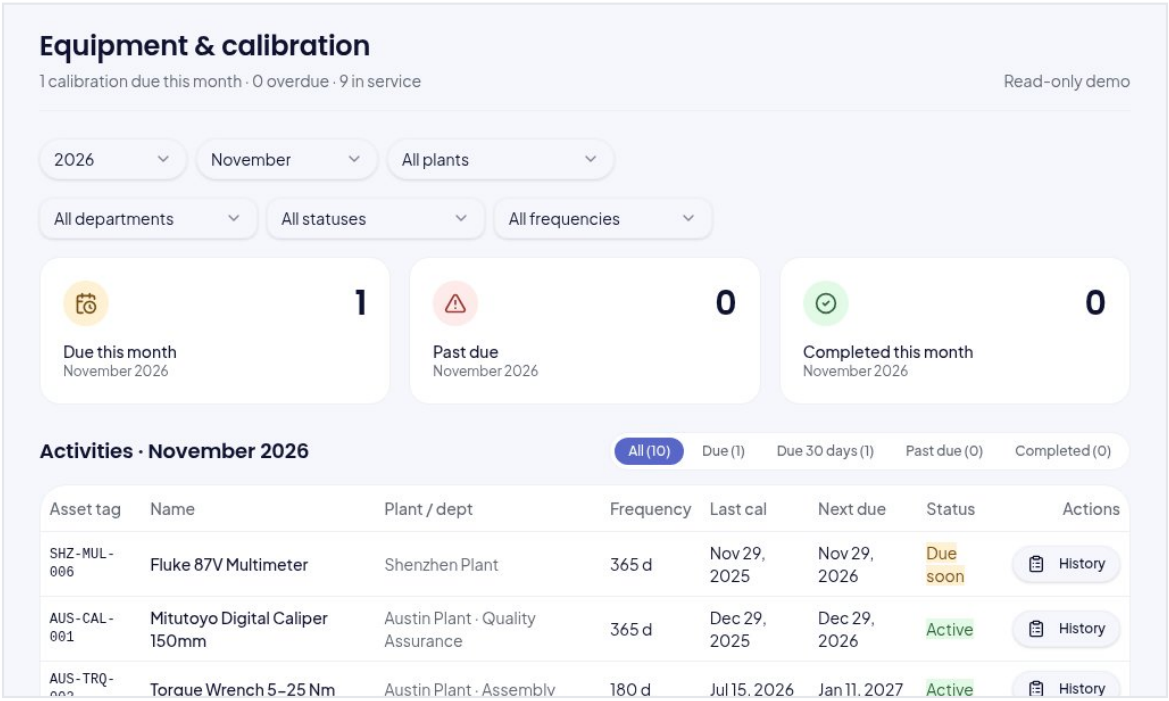


Figure — Equipment list with calibration due dates and status.

Best practice. Recalibration frequency should be evidence-based. If drift is minimal for two cycles, consider extending; if you see frequent fails, shorten.

Set up

1. Import your equipment list from *Admin settings › Data import* with asset number, description, location and calibration interval.
2. Attach the calibration procedure or certificate template to each asset.
3. Configure notification lead times (e.g. 30 days before due).

Day-to-day use

1. On the due date, the technician opens the asset and taps **Log calibration**.

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2. Record readings, pass/fail or adjusted, and attach the supporting certificate before signing online. Offline drafts are not automatically submitted as signed evidence.
3. A failed calibration marks the equipment out of service — investigate product measured since the last good calibration and open a CAPA.
4. Saved calibration records are permanent. Review the instrument history after signing; do not try to attach a certificate or change readings on an existing signed record.

Best practices & tips

- Label every controlled instrument with its ID and next due date.
- Segregate out-of-calibration equipment physically; the app record isn't enough on the shop floor.
- External labs need traceability certificates on file.

Log and sign a calibration

1. Open the instrument from Equipment and choose **Log calibration**. Fill **Performed on**, **Performed by** and **Result**: Pass, Conditional pass or Fail.
2. Enter **As-found readings (JSON)** and **As-left readings (JSON)** using a valid object, for example {"measured": 10.01, "unit": "mm"}. Put the actual readings and units in the fields; do not paste a certificate as the reading result.
3. Attach supporting documentation in **Certificate** before signing: PDF, PNG or JPEG. This individual form permits no certificate, but your quality process may require one; a missing file remains missing.
4. Add **Notes**, **Signing reason** and **Confirm password**, then **Sign and save calibration** while online. A fail marks equipment out of service; investigate affected product. The signed record and its readings remain immutable.
5. In **Calibration history**, expand **Notes and readings** and choose **Download certificate** . Downloads use an expiring authorized link; reopen the record for a new link if it expires. Certificates cannot be added to an already saved calibration.
6. Distinguish **Password signed** from **Legacy record**. A **Sample certificate** is a labeled illustration, not genuine traceability or a historical signature.

Schedule and category administration

1. With admin edit access, use **Change frequency or service status** on the instrument. Set **Frequency (months)** (1–120), **Grace days** (0–365) and the responsible person, then **Save schedule**.
2. Legacy day-based intervals remain unchanged until explicitly converted. Month-based recurrence uses calendar months. Review the next due date after any change.
3. For out-of-service equipment, use the authorized **Clear out-of-service status** option only after the underlying issue has been addressed; it is not proof of a new calibration.
4. Open *Admin settings › Calibration settings* to save category defaults, schedules and grace periods where offered. Verify individual instrument schedules rather than assuming defaults rewrite all existing instruments.

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> **Watch out.** Calibrations require online password confirmation. Offline drafts never replay automatically as signed calibrations; reconnect and deliberately review/sign them.

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Compliance register

The compliance register tracks external obligations — regulations, standards, permits and customer-specific requirements — with owners, review dates and automatic status.

Where to find it: Sidebar › People & Governance › **Compliance register**.

Set up

1. List every standard and regulation applicable to your business.
2. Assign an owner per obligation.
3. Set the review frequency (annual is typical) and next review date.

Day-to-day use

1. Owners review obligations on schedule, attach the available evidence and use **Mark reviewed**; create a CAPA separately when corrective action is required.
2. The offered statuses are **Compliant**, **Action needed** and **Overdue**. Use **Mark reviewed** after review to set Compliant and advance the next review date by the saved frequency; check that date. Authorized users can also edit the next review date and status.
3. Review overdue and action-needed items in the register and dashboards; configure notifications appropriate to the obligation.
4. Selected obligations can be added to a Management review session as context inputs.

Best practices & tips

- Attach the source document or a link — auditors want to see what you comply with.
- When a regulation changes, open a Change order and revise affected documents.
- A missed compliance review is itself a finding.

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Dashboards

Insights › *Dashboards* is a single hub with tabs for each view: Leadership, CAPA & Problem Solving, Inspections, Training, Risk & compliance, Document control, Operations and Company metrics. Each tab shows headline cards with trends and charts.

Where to find it: Sidebar › Insights & Reviews › **Dashboards** — choose a tab across the top.

> **Note.** Dashboards refresh each time you open them. Automatic background refresh (15-minute interval) is a paid option, off by default, that only the SuperAdmin can switch on in Admin settings.

Set up

1. Grant dashboards.view to every role that needs a bird's-eye view — Executive usually gets view, print and export.
2. In *Admin settings* › *KPI definitions*, tick **Show on Company Metrics Dashboard** for the KPIs leadership should see.
3. In *Admin settings* › *Company metrics*, choose which metrics show as cards and charts.

Day-to-day use

1. Open **Dashboards**; it reopens on the tab you used last.
2. Use the plant and reporting-period filters. The selection is kept in the page address, so a filtered dashboard can be shared.
3. Cards show the current count with a comparison to the previous period; click a card to open the source module.
4. In the hub, choose **Print / Download PDF**, then use the browser print dialog to print or Save as PDF. Where a dedicated **Export PDF** is offered on a standalone dashboard, it snapshots displayed metric cards with plant, period, comparison window and export time. Saved report tiles are excluded from dashboard printing; export their report separately.

Best practices & tips

- Open dashboards at the same time each week so trends are comparable.
- Use the PDF export for meetings rather than screenshots — it carries the filters with it.
- If a card looks wrong, click through and check the records before acting on it.

CAPA & Problem Solving dashboard

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Where to find it: Sidebar › Insights & Reviews › **Dashboards** › **CAPA & Problem Solving** tab.

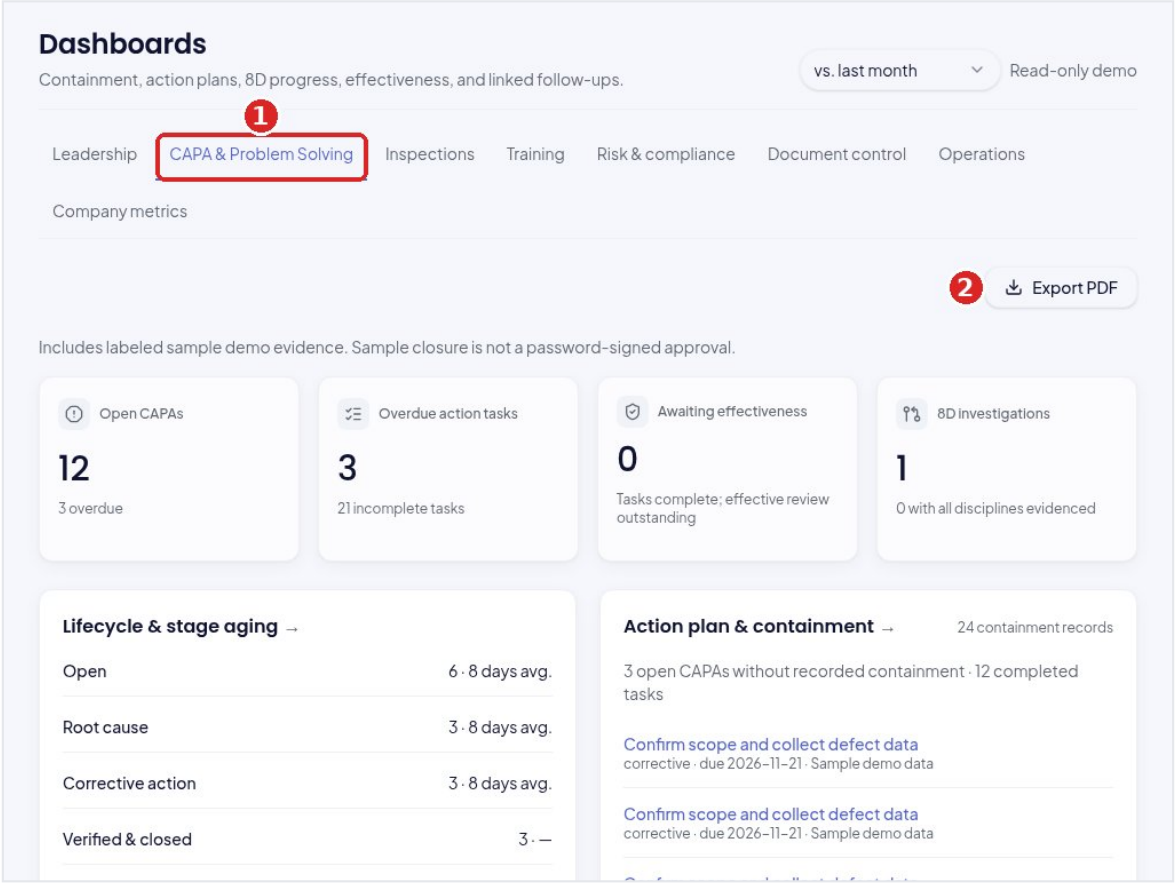


Figure — (1) The CAPA & Problem Solving tab. (2) Export PDF of the displayed figures.

- **Open CAPAs** with the number overdue; **Overdue action tasks**; **Awaiting effectiveness** (tasks complete but no effectiveness check yet); **8D investigations** and how many have every discipline evidenced.
- **Lifecycle & stage aging** — how many CAPAs sit in each stage and their average age.
- **Action plan & containment** — open CAPAs without containment and upcoming tasks; click a task to open its CAPA.
- **Upstream sources** (nonconformances, inspections, complaints, audits) and **downstream follow-ups** (linked change orders and retraining).
- Use the comparison selector (for example *vs. last month*) to see the trend.

Document control dashboard

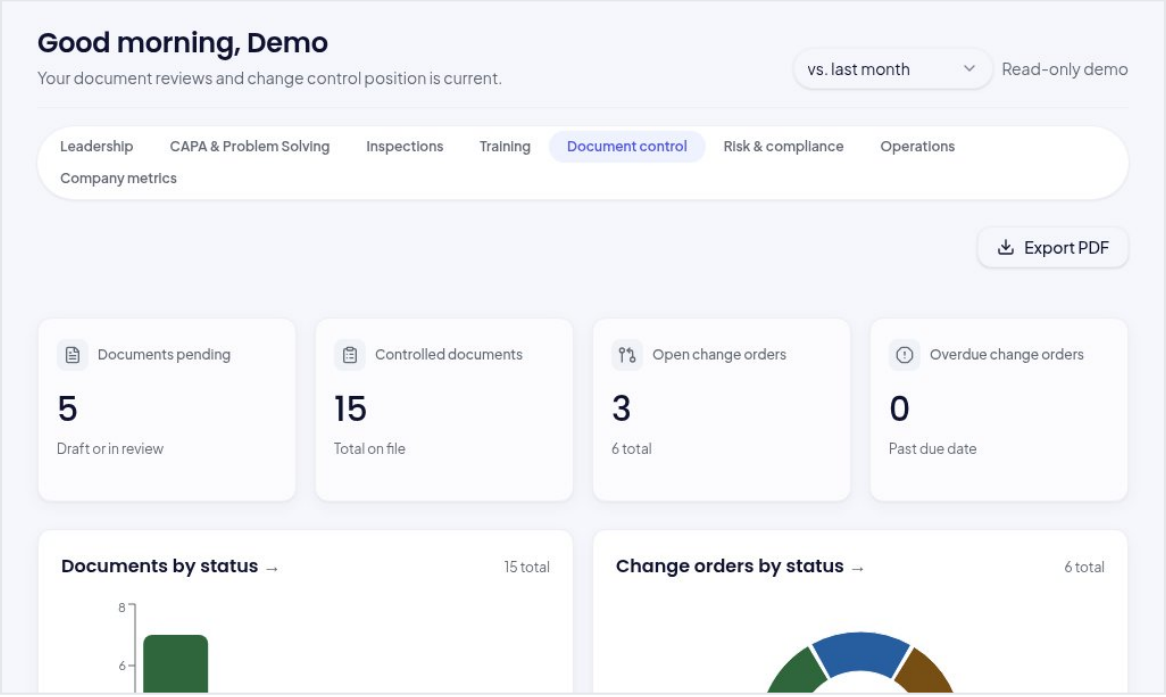


Figure — Document control tab: documents by status and reviews coming due, with a + New document shortcut for editors.

Goals & KPIs

Insights › Goals & KPIs brings company goals, KPI results and company metrics together. KPIs turn quality outcomes into measurable numbers; goals turn objectives into tracked work linked to those numbers.

Where to find it: Sidebar › Insights & Reviews › **Goals & KPIs**.

Set up

1. In *Admin settings › KPI definitions*, create each KPI. **Identity**: name, kind (metric or KPI), unit and description. **Cadence & direction**: weekly, monthly or quarterly; higher or lower is better. **Scope & goals**: company or plant scope, department, owner and the goal value, with optional **Plant goal overrides** and a company roll-up goal. **Tolerance**: how far from goal still counts as on target.
2. Save. Definitions are protected against two people editing at once; if someone saved first, reload and reapply your change.
3. Retire a KPI with **Archive** and an **Archive reason** instead of deleting it — history is kept.
4. Create goals from **New goal**: title, description, department, plant, owner, priority, start and due date, expected outcome, and for numeric goals a **Target value**, unit and direction. Link one or more KPIs and mark one as primary.

Day-to-day use

1. In Goals & KPIs choose Company goals, Goals, Company KPIs, Quality KPIs or Company metrics as allowed. Company KPIs are manual-source; Quality KPIs are platform-source. Owners open **My metrics & results**, use **My metrics** and **Reporting date**, then **Enter result**, **Update** or **View** for the row. Every entry and change keeps a before-and-after history.
2. When a period is final, an authorized manager uses **Close period** in the period drawer. Closed periods can't be edited — check the numbers first.
3. Goal cards show the latest result, goal, attainment and the **Vs target** difference (actual minus goal, in the KPI's own units — dollars stay dollars, percentages stay %).
4. Owners add actions and monthly check-ins to each goal; target changes are kept in the goal history.

> **Watch out.** Closing a KPI period is permanent. It also locks the period for corrections, so close only after the monthly review has agreed the figures.

Best practices & tips

- Fewer, well-chosen KPIs beat a wall of metrics. Aim for 5–8 top-level KPIs.
- Every KPI should map to a business or customer outcome.
- Revisit goals annually. If everything is green, the bar is too low.

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- A KPI red for three periods without action belongs on the Management review agenda.

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Scorecard

Insights › *Scorecard* is the management-review grid: every metric and KPI with its result, goal, difference to goal, difference to the prior period and status, grouped by department, for one month or week.

Where to find it: Sidebar › Insights & Reviews › **Scorecard**.

> **Note.** The Scorecard shows only records your role and plant scope allow, and the PDF uses exactly the same filters and calculations as the screen.

Set up

1. Make sure each KPI has a department, cadence, direction, goal and tolerance (see Goals & KPIs).
2. Admins can add a company logo and footer text in *Admin settings* › *Branding* for the branded PDF.
3. Grant kpi.view to everyone who should see the Scorecard.

Day-to-day use

1. Choose **Monthly** or **Weekly**, then step between periods with the arrows or the period picker.
2. Filter by **Plant**, **Department**, **Kind** and **Status**; sort any column. Filters and sorting stay in the page address for sharing.
3. Expand a plant-scoped row to see each plant's result and goal.
4. Read the differences: **Δ vs goal** is the result minus the goal; **Δ vs prior period** is the result minus the previous period. Both use the metric's own units. Green or red reflects whether the result is favourable for that metric's direction.
5. The grid separates Metrics and KPIs; statuses include On target, At risk and Below, while missing values show Not entered. Shift-click headings for multi-column sorting. Choose **Export PDF** for a branded, printable scorecard.

> **Tip.** A Δ vs goal of $0.00 means the result exactly equals the goal. If you expected a difference, check the goal saved in KPI definitions for that period.

Best practices & tips

- Use the Scorecard as the agenda for the monthly management meeting.
- Discuss reds first, then ambers; greens need no airtime.
- Keep units consistent — enter money in dollars and rates in percent so differences read naturally.

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Company metrics

Company metrics tracks the monthly numbers leadership manages the business by — Sales, Net Income, EBITDA, Cash and any others you define — with a plan and actual for every month.

Set up

1. Open *Admin settings › Company metrics* and choose **New company metric**: name, category, format ($ Currency, # Number or % Percent), decimals, direction (higher or lower is better) and display order.
2. Tick **Card** and **Chart** to choose what appears on the Company metrics dashboard; untick **Active** to retire a metric.
3. Grant company_metrics.view to readers and company_metrics.manage to the people who enter numbers.

Day-to-day use

1. Open *Insights › Goals & KPIs* (Company metrics view). Choose **Year**, **Month** and **Plant** (Company-wide for company scope), then **Enter values** and record the plan and actual.
2. The table shows Plan, Actual, Delta (actual minus plan) and Delta % for the selected month, plus a month-by-month view of the year.
3. Open *Dashboards › Company metrics* for cards and trend charts, and export a PDF for the meeting pack.

Best practices & tips

- Enter the plan for the whole year at budget time so every month has a comparison.
- Enter actuals on a fixed day each month, after the books close.
- Explain large deltas in a note — numbers without context invite the wrong conclusions.

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Management review

Management review sessions bring leadership together to review QMS performance against the ISO 9001 §9.3 inputs: audit results, customer feedback, CAPA status, KPI performance, risk changes and resource needs.

Where to find it: Sidebar › Insights & Reviews › **Management review** › **New session**.

Best practice. Close the loop: every management review action should be traceable to a CAPA, a KPI change or a documented risk acceptance.

Set up

1. Schedule reviews at a defined cadence — quarterly is common, at least annually.
2. Set the standing agenda in the first session and reuse it.
3. Nominate a chair (usually the Quality Manager) and a scribe.

Day-to-day use

1. Open a new session two weeks before the meeting; performance inputs are pre-filled from audits, CAPAs, documents and training for the plant and period.
2. Add context inputs manually, or add selected risks and compliance obligations from those registers.
3. Capture decisions and actions with owners and due dates; send an action to CAPA where needed.
4. Use **Refresh** to update captured performance inputs before finalizing. Move the session through Draft, In progress, Finalized and Distributed using its status control. Finalized/distributed sessions are locked; reopening requires the appropriate ability. Review prior actions at the next session; status changes alone are not proof an email was sent.

Best practices & tips

- Focus on decisions, not status updates — the tool already shows status.
- Every action needs an owner and a date.
- Keep minutes concise. Auditors want decisions and evidence.

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Reports — saved reports and evidence searches

Reports turns caller-visible QMS records into reusable tables, charts and exportable evidence. A saved report defines a single analysis; a report template combines several analyses and Insights sections into one recurring pack.

Where to find it: Sidebar › Insights & Reviews › **Reports** › **New report** (top right).

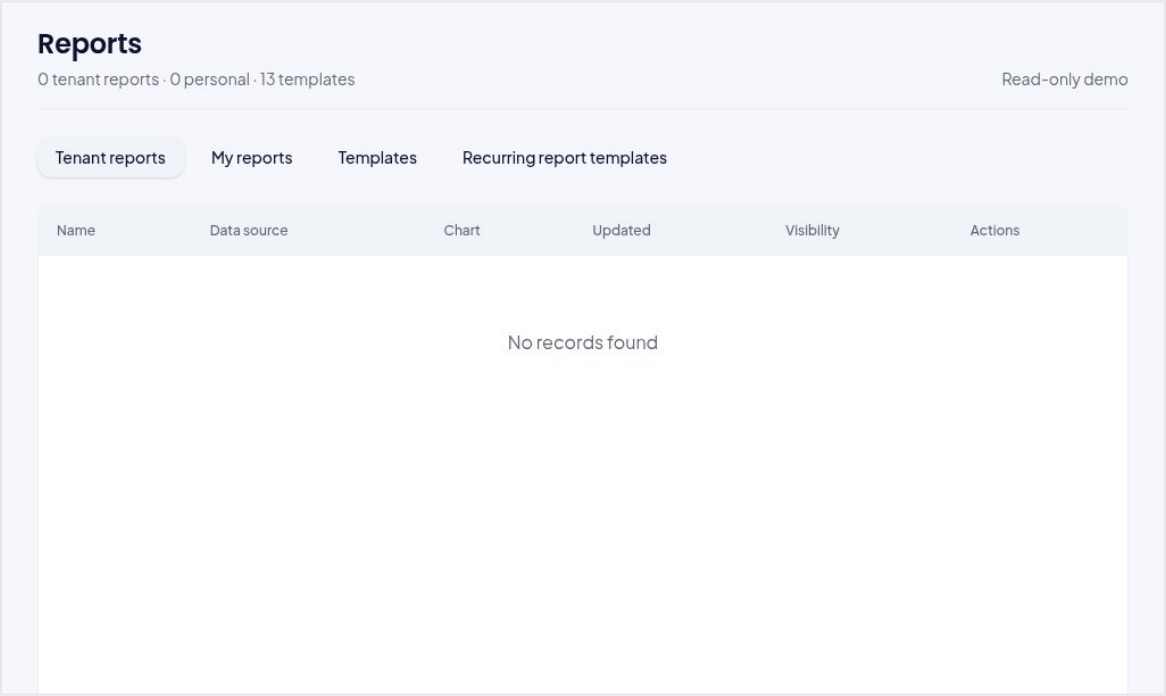


Figure — Reports home: Tenant reports, My reports and Templates.

> **Note.** Report access never widens source-record access. Missing or forbidden data is unavailable, not zero. A report shared with a colleague may show fewer rows for their role or location scope.

Set up

1. Ask your Admin to grant report-viewer or report-author access as appropriate, together with source-module abilities. Authors create or edit definitions; viewers run the reports they may access.
2. Open *Insights › Reports*. Choose Tenant reports, My reports or Templates. Built-ins include CAPA aging by plant, Audit findings summary, Training compliance by department, Overdue training by employee, Risk register by severity, Supplier scorecard summary, Document revision backlog, Inspection FPY trend, Complaint root-cause Pareto, Change

control cycle time, Equipment calibration due and Nonconformance Pareto.

3. Set your company logo and report footer in Branding before distributing reports externally.

Day-to-day use

1. Choose a saved report, or choose **New report**, select a source, then **Start blank** or **Use template**. Enter **Report name**, **Description** and **Visibility** (Personal or Tenant). System templates are read-only: Duplicate report or Use template creates your editable copy.
2. Select grouping fields and measures appropriate to that source. Choose a table or chart display and add filters such as stage, status, department or owner where available. Save the definition before leaving.
3. Use **Dates** and **Locations** for a specific search. Choose a date preset or Custom and enter **From** and **To**. Select one or several accessible locations; All locations means all locations you may read, not every site in the system.
4. Run the report and check its labels and filters before exporting. Module date scope uses opened dates; a due date or completion date is not interchangeable with the opened date.
5. Click a supported chart group or metric to inspect **Underlying records**. Open an accessible record or a filtered module list to investigate. Export the underlying rows as CSV when needed.
6. Use **CSV**, **Excel** or **PDF**. Saved report exports rerun the definition (up to 100,000 rows), rather than just downloading the screen's run (up to 10,000 rows). Editing-mode Run/export saves first; check the output and its scope before distributing it.

Cross-module activity reports

Use the cross-module activity source to compare supported QMS record activity in a common date/location search. Group by source, plant, owner or other offered fields. Drill-downs use the selected grouping and definition filters; check the evidence view's scope, because temporary date/location run filters are not passed to every drill-down. Evidence retrieval is capped at 1,000 rows; inaccessible records remain unavailable.

Saved report tiles on Home and Dashboards

1. On Home or a supported dashboard, choose **Saved reports › Add report tile**. Use **Search reports**, select **Report**, choose **Size** (Small, Medium or Large), optionally **Company-shared tile**, then **Add tile**. Author permission is required; shared tiles need tenant-visible reports.
2. On Home or Dashboards, inspect the saved-report tile, open its report and use the edit or remove controls when available.
3. Reorder editable tiles by dragging or using **Move earlier / Move later**. Use **Expand report**, **View report**, **Refresh report** or **Remove tile** as offered. Tiles run their saved definition, not the enclosing dashboard's temporary date/location filters.
4. Tiles use a private, permission-aware cache with up to five minutes of freshness and source-change checks. Open or rerun the report for a deliberate refresh before distributing a final pack.

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Scheduled delivery

Choose **Schedule** to open **Report schedules**. Set cadence (daily, weekly, monthly or custom cron), **Time (company timezone)**, **Recipient emails**, format, subject and message, then **Save paused schedule**. Monthly days are 1–28; recipients are 1–20 valid addresses. Email delivery is not configured: schedules stay paused and have not been sent. Delete obsolete schedules; combined templates are not integrated with email schedules.

> **Watch out.** Exports capture a point in time. They are not a live link and do not themselves constitute signed approval or a controlled release.

Best practices & tips

- Name reports for the decision they support, for example 'Open CAPAs by plant', rather than 'Report 1'.
- For parity checks, compare the same scope, date basis and status filters; current open counters need not equal records opened in a historical month.
- Keep unavailable sections visible in distributed packs; do not replace missing information with a made-up zero.

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Report templates — recurring QMS packs

A customizable report template saves the sections, metrics and default date/location filters for a recurring QMS report. It can mix module analyses with Scorecard metrics, Goals and KPIs, current dashboard counters and written notes.

Where to find it: Sidebar › Insights & Reviews › **Reports** › **Templates** tab › **New template**.

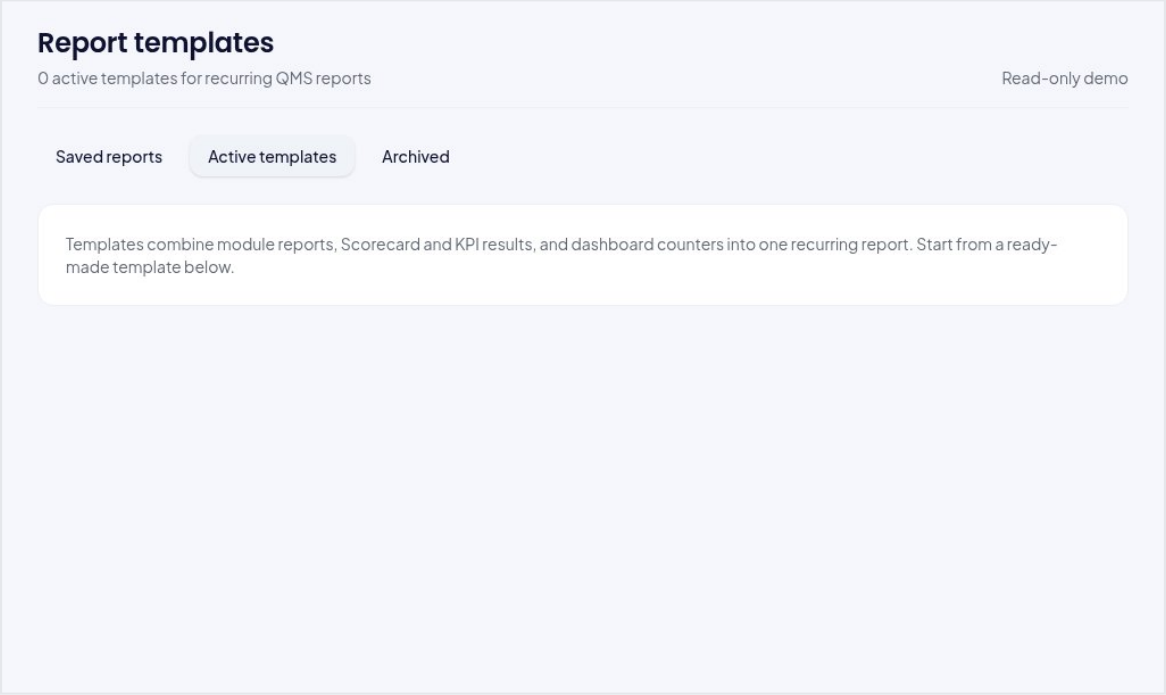


Figure — Report templates: active, ready-made and archived packs.

Tip. Choose relative defaults such as Last month for a recurring pack. A Custom range stays fixed until you change it.

Set up

1. Open *Insights › Reports › Report templates*. With report-author access, choose **New template**, or **Use this template** under Ready-made templates.
2. In **Edit report template**, enter **Template name** and **Description**. Set **Default date and location filters**: Dates preset and Locations, with From/To for a custom period.
3. Add the required section types using the controls below Sections. Give each section a meaningful title; use the up/down arrows to arrange the pack and the remove icon to discard a section.
4. For a module section, choose **Module**, **Display**, **Group by** and **Metric**. Add **Default filters** with the filter field, rule and value, then **Add filter**. For 'is any of', enter

comma-separated values.

5. For a Scorecard section, choose **Scorecard metrics (result vs goal)** or **Goals and KPIs (actual vs target)**. For a dashboard-counter section, choose the required current counters. Add text sections for purpose, conclusions or review notes.
6. Choose **Save** to keep the definition, or **Save and run** to save and open the results. If another author saved first, reload the latest template and reapply your changes instead of overwriting them.

Day-to-day use

1. From **Active templates**, open the template or choose **Run**. Its default filters are applied.
2. For a specific investigation, change **Dates** to Custom, enter From/To and select the relevant **Locations**. The run filters are in the page address and do not overwrite the template's saved defaults.
3. Review each section. Module sections include records opened in the selected range and locations. Scorecard/KPI sections use the month containing the range end date. Dashboard counters show current counts at the chosen locations, not historical counts for the selected range.
4. Choose **Run again** when you need to refresh results. Empty selections show no matching records; missing access or failed sections remain unavailable.
5. Choose **PDF** for one printable pack containing the section titles and results with dates, locations and generation time. The template PDF is a text/table summary, not an image of every chart.
6. Use **Duplicate** from the list to create a variant without changing the original. Use **Edit › Archive** to retire a template; find it under **Archived** and use **Restore** when required.

Worked example — monthly management review

1. Create a template named 'Monthly management review'. Set Dates to Last month and Locations to the sites included in the meeting.
2. Add a text section for agenda/context; a module section for CAPAs grouped by plant and stage; another for audits; a Scorecard metrics section; a Goals and KPIs section; and current dashboard counters for open items.
3. Save and run. Confirm the Scorecard month, the opened-date basis of the module sections and the current-date basis of the counters before comparing the numbers.
4. Use PDF and review the pack, then record the meeting's actual decisions and assigned actions in Management review. Template notes do not automatically become action records.

Practical limits

The editor supports up to 30 sections; module sections offer up to five grouping fields and 20 default filters, and a counter section up to 12 counters. Module rows in the combined PDF are summarized up to 200 rows per section. For full underlying records, run/export the corresponding saved report instead. A reusable template is not an automatic email schedule.

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> **Watch out.** Never compare a historical 'opened this month' section with a current 'open now' counter as if they measured the same thing. Include the date basis in the section title or notes.

Best practices & tips

- Separate management-review packs from detailed audit evidence packs; different audiences need different depth.
- Re-run with one location and a narrow custom date range to troubleshoot unexpected results.
- Archive obsolete versions rather than leaving several similarly named templates active.

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Admin settings

Admin settings brings together everything SuperAdmins and Admins use to configure the workspace, grouped into five sections.

Where to find it: Sidebar › Admin › **Admin settings** (visible to SuperAdmin and Admin roles).

Watch out. Removing the last user with a given ability can leave a workflow stuck (for example no approvers). Check before you remove it.

Organization

- **Locations** — company/location details, plants and departments. **Branding** — company logo, report accent and PDF footer.
- **Users** — invite teammates, assign roles and plant or department scope, deactivate leavers.
- **Roles & abilities** — review preset roles; only SuperAdmin and Admin can create roles.
- **Branding** — configure report identity separately from location scope.

Quality system setup

- **Inspection templates**, **Inspection rules**, **Products**, **Routings** — see the Inspections and Work orders chapters.
- **KPI definitions** and **Company metrics** — see Goals & KPIs and Company metrics.
- **Audit questions** — the shared audit question bank. **Supplier scorecard** and **Calibration settings** — see the supplier and equipment chapters.

Approval config

- **Standing approval rules** and **My delegations** — see My approvals.

Resources

- Resources contains the **User guide**. Data import lives under Platform; review its dry-run and batch results before committing. Rollback is available only where offered and permitted; it is not a way to erase immutable evidence.
- **User guide** — preview, print or download this handbook.

Platform

- **Security**, **Notifications** and **Data import** are also in Platform. **Billing & plan** — your plan, trial dates, enabled modules, and plants and users used against your limits.

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Owner-only paid switches remain SuperAdmin-only; card upgrades are not currently enabled.

Multi-factor sign-in

1. Each person enrols first: *Admin settings* › *Security* › **Enroll authenticator**, scan the QR code (or enter the manual secret), enter the six-digit code and choose **Verify & activate**. Keep the authenticator secret private.
2. A SuperAdmin or Admin controls **Require MFA for this workspace**. Check the displayed policy and enforcement/grace date: defaults can differ by workspace. Fidelity Manufacturing was explicitly configured with MFA off; do not assume that applies to every new company.
3. When policy is enforced, use **Set up authenticator** or **Sign in again** as prompted to satisfy MFA. A grace banner may offer **Set up now** before enforcement. Existing enrollments are retained if the workspace requirement is switched off.

> **Note.** Only the SuperAdmin and Admin roles can change the multi-factor setting.

Best practices & tips

- Grant Admin sparingly. Two admins is usually enough — one primary, one backup.
- Review the ability matrix quarterly; people change roles, access rarely follows.
- Prefer editing a preset role's abilities to duplicating it.
- Dry-run every import and read the preview before committing.

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Workspace administration — implementation checklist

Use this checklist when introducing ClarityQMS to a new company, plant or team. Configure scope and permissions first, then workflows, then reporting. A setup control being visible does not guarantee that every save is permitted.

> **Best practice.** Pilot one end-to-end record in your own writable workspace before inviting the full team. Do not use the read-only public demo as a production setup test.

Set up

1. Open **Admin settings** › **Locations**. Add plants and departments before importing records. Use the correct plant on each department and record; review active/read-only location status where offered.
2. Open **Users** to invite teammates, assign roles and location scope, and deactivate leavers. Check **Roles & abilities** against actual responsibilities; viewing, editing, signing and report authoring are separate permissions.
3. Open **Branding** and set the company logo, report accent and PDF footer. Export a sample report to confirm that your identity prints correctly.
4. Configure the quality-system catalogues: products/routings, inspection templates/rules, audit questions, KPI definitions, company metrics, supplier scoring and calibration category settings.
5. Configure **Notifications** and approval delegation/rules. Separate in-app notices from email delivery: an available email address or saved schedule does not prove messages are being sent.
6. Review **Security** and **Billing & plan** with the owner. Make sure users understand MFA, trial expiry, read-only limits and unavailable card upgrades.

Day-to-day use

1. Use **Data import** for supported record types. Choose the type, select a CSV, map columns, resolve plant/department names and read the validation preview/dry run.
2. Use YYYY-MM-DD for date fields and the displayed allowed status values. Fix missing required values and ambiguous location names before committing; keep a copy of the source file and results.
3. Review import batches and errors. Roll back only where the offered action is authorized and compatible with record protections; do not promise deletion of signed or immutable history.
4. Open **Profile** from the avatar menu to update personal details. Set the default plant through the offered selection/preferences; Home restores the saved choice.
5. Run a real workflow: create a record, review/supply evidence, make the permitted signed decision, read back the final state and export it. Repeat with a scoped viewer to confirm

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access.

6. Review permissions, overdue work and inactive people periodically. Keep a controlled copy of this guide in Documents if your local QMS requires it.

Standing rules and absence coverage

1. In **Standing approval rules**, create a bounded low-risk rule using **Rule name**, **Record type**, **Plant**, **Category**, **Maximum severity**, **Requester**, **Reason template** and expiry. Critical options are excluded. Review the scope before saving; revoke and recreate rather than treating rules as freely editable.
2. In **My delegations**, choose **New delegation**, delegate and dates. Maximum duration is 60 days; distinguish Active, Scheduled and Ended delegations.
3. For an individual approval, choose Approve, Reject or Delegate; in **Sign decision**, select **Delegate to** when needed, enter a meaningful reason (at least four characters) and password, then **Sign & submit**.

> **Watch out.** A generic approvals.bulk grant does not authorize every signed module batch. CAPA close, document release and training batches need their own abilities and evidence eligibility; equipment calibration uses its online single-record signing form.

Best practices & tips

- Maintain a primary administrator and a backup, without giving every manager full access.
- Test scope with a real restricted role, not only a SuperAdmin account.
- Importing a current status is not proof that a historic signature or certificate exists.

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Trials, plans and read-only access

Billing & plan shows workspace plan, module and usage limits, and trial state. Commercial controls differ from normal record permissions.

> **Note.** Self-serve workspaces receive a 14-day Team trial. Trial expiry makes the workspace read-only; no automatic card charge is taken.

Set up

1. The owner reviews **Admin settings › Billing & plan** for the plan, enabled modules, user/plant limits and trial dates.
2. Before expiry, arrange the next step through **Contact billing** at contact@valorsuite.com. **Add payment method** is disabled: card upgrades are not available yet.
3. A separately authorized platform administrator may extend an eligible trial once by seven days using **Extend trial by 7 days**. A normal company Admin cannot assume platform authority.

Day-to-day use

1. Read the trial banner: remaining days before expiry, or **Trial ended. Workspace is read-only.** afterward.
2. In read-only state, browse and export accessible existing records; creating, editing and signing are blocked. Do not try to bypass the limit with imports or direct actions.
3. After 31 read-only days, the trial lifecycle may soft-archive the workspace. The stated retention policy is 90 days; discuss recovery/continuation with billing instead of treating the guide as a guarantee of indefinite access.
4. Paid dashboard background refresh is owner-only, off by default and separate from the five-minute saved-report cache. With it off, dashboards refresh when opened.

Best practices & tips

- Export permitted business records before trial expiry if you need them for continuity.
- Track workspace status separately from an individual location being marked read-only.

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Public website, demo and supplier access

The public website explains modules, setup, security and plans; it is separate from company records. Public forms grant no access to internal queues.

> **Watch out.** Public demo visitors may browse but must not save any actions or changes. Demo reset remains off. Labeled samples are illustrations, not authentic signed evidence.

Set up

1. Use the website **Home** link to return to the landing page; browse the product/module menu, How it works, Why and Security for the feature overview.
2. Use the request-demo/contact form for an enquiry, or the demo page for a read-only walkthrough. Contact details are contact@valorsuite.com.
3. For customer complaints, provide only the company's opaque public intake link. Opening the staff Complaints page without that link requires internal access.
4. Supplier portal access must be provisioned for the external supplier identity. Direct the contact to Supplier portal sign-in only after confirming their access.

Day-to-day use

1. Browse the demo's populated modules and exports; distinguish Sample attachment, Sample certificate and illustrative supplier scores from saved production evidence.
2. Use product pages for module explanations and actual demo screenshots. Security's standards map describes supporting features, not certification of your company or guaranteed compliance.
3. Read About and Blog for published material; public readers never see drafts. Newsletter signup records consent; unsubscribe through the supplied link. Newsletter collection is not a live mailing campaign service.
4. Use Privacy, Terms, DPA and Contact for the published policies. **Service status** is a neutral information page, not a promise of automated live monitoring or a contractual uptime guarantee.
5. A provisioned supplier portal displays **Your scorecards**, **CAPAs attributed to you** and **Shared documents**. It is a read-only overview; ask internal staff to record responses rather than expecting an external CAPA edit form.

Best practices & tips

- Evaluate the actual workflow in a writable company before treating demo behavior as acceptance evidence.
- Customer assessment, validation and certification remain the customer's responsibility; the application supports their process.

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Platform administration and publishing

Platform Administration is for separately authorized platform operators. A company's SuperAdmin or Admin role does not automatically grant cross-company administration or website publishing.

> **Note.** These pages are not routine customer setup. If you cannot access Platform Administration, use your company Admin settings; do not request broader rights just to configure a plant.

Set up

1. Authorized operators open **Platform Administration**. Its tabs are **Overview**, **Tenants**, **Subscriptions**, **Plans**, **Audit log**, **Comms** and **Blog**.
2. Review overview totals and tenant rows before acting. An unavailable or failed count must not be interpreted as zero.
3. Use the permitted tenant/subscription/plan controls for commercial administration. Trial extension is a one-use, seven-day platform action. Do not infer active card charging or email delivery from a saved configuration.

Day-to-day use

1. In **Blog**, choose **New post**. Fill **Title**, **Slug**, **Subtitle**, **Author name**, **Cover image URL** (or **Cover image upload**), **Excerpt**, tags and **Markdown body**.
2. Use **Write / Preview** to check content; choose **Save**, **Save as draft** or **Publish** as offered. The statuses are Draft, Published and Archived; there is no scheduled-publish workflow.
3. Complete multi-factor sign-in before publishing or exporting subscribers. Cover uploads accept JPEG, PNG and WebP up to 5 MB.
4. Open the public blog article after publishing and confirm its cover, text and links. Private covers are visible publicly only through published-post access.
5. Use **Export subscribers** only for an authorized purpose. The CSV contains personal contact/consent information and unsubscribe links; protect it. Exporting does not send a newsletter.
6. Use Comms and logs to review available operational records; do not equate a configuration page with verified email delivery or monitored uptime.

Best practices & tips

- Keep draft and published states distinct; verify the public result after publication.
- Do not use cross-company operator privileges to bypass normal evidence or signature protections.

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Troubleshooting and operational limits

When a result is missing, establish whether it is an empty selection, unavailable access, an unsaved draft or a connection problem before repeating an action.

Symptom	Check and next action
0 versus Unavailable	0 is a successful empty count. Unavailable is a failed/forbidden read; check scope, role and connection. Do not substitute zero.
Report numbers differ	Compare opened-date versus current-open counts; location scope; KPI month; definition filters; stale cache; display/export caps. Check drill-down scope separately.
Cannot save or sign	Check read-only demo/trial/location status, workflow ability and required MFA. Reconnect for signatures; never bypass password confirmation.
Offline inspection	Open online first, submit a local attempt, reconnect and verify sync. Review conflicts. Only then close and sign online.
Offline dashboard	Only successfully cached inspection-dashboard data is persisted for your user for 24 hours. A new uncached page needs connectivity. Sign-out clears the saved copy.
No file or expired download	Metadata-only/legacy evidence may have no file. Reopen for a fresh authorized download link. Sample files are labeled fallbacks, not historic originals.
Revision comparison	Comparison shows snapshot fields/file references, not PDF or Word text redlines. Download the relevant files for a content review.
Save conflict	Reload the latest saved record/template and reapply reviewed changes. Do not overwrite another user's work blindly.
Schedule not received	Report schedules are saved paused and email delivery is not configured. A subscriber list is collection-only. No message was sent by saving either.
No eligible batch rows	Read the exclusion reasons. Critical/policy-flagged requests and missing verification/revision evidence require individual review; server checks remain authoritative.

Support information to provide

- Record code and page name, workspace/location, selected filters, time of the issue, exact visible message and the action attempted.
- Whether the user is a demo visitor, in a read-only trial/location, offline or awaiting MFA. Do not send passwords, authenticator secrets or private signing tokens.
- Contact contact@valorsuite.com for product/billing enquiries; retain your original evidence and downloaded report while investigating.

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Best practices & tips

- Retry a failed read, but check for a saved result before repeating a write or signature.
- Use Back/parent breadcrumbs to leave a detail page without discarding a save you still need to make.

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Appendix A — Preset roles and access checks

Preset roles are starting points, not a guarantee of an exact ability set. The live Roles & abilities page is authoritative; older workspaces can retain legacy presets and local changes.

Role	Access review before assignment
SuperAdmin	Workspace owner/full-access starting point; owner-only paid switches are distinct from ordinary Admin access.
Admin	Company administration; check workflow and source-module rights. This is not platform administration.
Quality Manager	Quality-system leadership; check each required edit, close, sign and reporting permission.
Executive	Leadership views and decisions; separately check signing and export access.
Department Manager	Team work and metrics; apply the intended department/plant scope.
Quality Auditor	Audit work and caller-visible supporting evidence; do not assume unrestricted edits elsewhere.
Inspector	Inspection capture and work-order visibility where permitted; not template administration.
Legacy presets	Management, Quality Clerk, Purchasing Manager and Purchasing Clerk may remain; inspect their current abilities.

Verify effective access

1. Select the role in **Roles & abilities** and inspect each module/action, including view, create, edit, delete, print/export and workflow-specific rights.
2. Check the user's plant/department scope, workspace/location writable state, enabled module and MFA policy. Ability alone does not override these limits.
3. Check report_author independently of source access. Check approvals.act, approvals.bulk and individual module close/release abilities independently.
4. Test the intended workflow as the scoped user. Only separately authorized platform operators may open Platform Administration.

> **Note.** Record access cannot be inferred from a role's name or from this handbook. Never broaden access just to force a blocked action through.

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Appendix B — Status and badge legend



Approved / Complete / Passed / On target / Compliant



In progress / Review due / Amber — near goal



Scheduled / Informational / Pending



Draft / Not entered / Archived



Overdue / Failed / Non-compliant / Off target



Change / Special status / Exception

Counters show **0** when nothing is waiting and **Unavailable** when a count can't be read for your role or connection. Δ chips show ▲ for an increase and ▼ for a decrease; their colour shows whether the change is favourable.

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Appendix C — UI conventions

- **Sidebar** — permanent left navigation in four groups; the active item is highlighted. Pin up to five favorites.
- **Back** — returns to the previous page, with a section fallback for direct links.
  Breadcrumbs — click an offered parent link to step back.
- **Filter chips** — top of lists, dashboards and the Scorecard; filters are kept in the page address so views can be shared.
- **My items** chip — narrows a module list to records you own.
- **Bulk actions** — tick two or more rows to reveal batch actions; signed batches need one password and skip ineligible records.
- **Password signing** — approvals and closures ask for a reason and your password; the signature meaning is fixed.
- **Export PDF** — use the export on the relevant view. Dashboard PDFs snapshot displayed metric cards; report PDFs use the selected report configuration; inspection PDFs include saved caller-visible evidence, not drafts.
- **Notification bell** and **Synced** indicator — top right, always visible.
- **Search records** — Ctrl K / ⌘ K from anywhere.
- **Avatar menu** — bottom of the sidebar for Profile and Sign out.

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Appendix D — Glossary

Term	Meaning
CAPA	Corrective and Preventive Action — the process for investigating and fixing quality problems.
Correction	Immediate fix to a specific occurrence; addresses the symptom, not the cause.
Corrective action	Action to prevent recurrence by removing the root cause.
Preventive action	Action to prevent the initial occurrence of a potential problem.
NCR	Non-Conformance Report — a record of a specific instance where a requirement was not met.
Root cause	The fundamental reason for a problem — usually systemic, not personal.
Fishbone / 5-Why	Root-cause tools: grouping causes under the 6Ms, and asking 'why' repeatedly.
FMEA / RPN	Failure Mode and Effects Analysis; Risk Priority Number = Severity × Occurrence × Detection.
ECO	Engineering Change Order — a controlled request to change a product, process or document.
Inspection	A checklist run against a job or stage, producing permanent pass/fail evidence.
Attempt	One submission of an inspection; re-inspections create new attempts, never overwrite.
Routing	The ordered list of production stages a work order must pass.
Stage exception	A recorded, authorised decision to advance a work order before its inspection passes.
KPI	Key Performance Indicator — a measurable value reflecting progress toward an outcome.
Tolerance	How far from goal a result may be and still count as on target.
Period close	Locking a KPI period so its results can no longer change.
Variance (Δ vs goal)	Result minus goal, in the metric's own units.
Plan / Actual	Budgeted and achieved values for a company metric in a month.
Scorecard	Grid of metric and KPI performance with goal comparison, trend and status.
RAG	Red / Amber / Green — status colouring for KPIs and compliance items.
E-signature	Password-confirmed, tamper-evident record of who decided what, when and why.
Delegation	Temporary hand-over of your approvals to a colleague (up to 60 days).

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Term	Meaning
Standing rule	Time-limited automatic approval for narrowly defined low-risk requests.
MFA	Multi-factor authentication — an authenticator code in addition to your password.
Approved Supplier List	Register of suppliers evaluated and approved to provide goods or services.

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Appendix E — Where is it? Quick reference

Every common action and exactly where to click. Buttons only appear for roles with the matching ability; read-only demo visitors see no create buttons.

I want to…	Where to click
Create a new document	Document & Change › Documents › + New document (top right)
Attach the file when creating a document	New document dialog › Attach initial file
Revise an existing document	Documents › open the document › Edit revision
See who approved a document	Documents › open the document › Approval trail
Raise a change order	Document & Change › Change control › + New change order
Open a new CAPA	Quality Events & CAPA › CAPA & nonconformance › + New CAPA
Work a CAPA (containment, actions, closure)	CAPA list › click the CAPA number
Switch a CAPA to 8D	CAPA workspace › Problem-solving method › 8D
Create a change order or retraining from a CAPA	CAPA workspace › Linked follow-ups › Create change order / Assign retraining
Record an effectiveness check	CAPA workspace › Effectiveness check › Record check
Sign a CAPA closed	CAPA workspace › Closure signature › Sign and close
Print a CAPA or 8D report	CAPA workspace › Export PDF (top right)
See CAPA health	Insights & Reviews › Dashboards › CAPA & Problem Solving
Run 5 Whys or Fishbone on a complaint	Complaints › Review › Root cause analysis › Start 5 Whys / Start Fishbone
Run 5 Whys or Fishbone on an inspection	Inspections › open inspection › Root cause analysis
Escalate an analysis to a CAPA or 8D	Root cause analysis › Escalate to CAPA / 8D
List only 8D investigations	CAPA & nonconformance › Method › 8D investigations
Print an inspection report	Quality Events & CAPA › Inspections › open inspection › Export PDF
Approve or reject a signature request	Workspace › My approvals
See my assigned actions	Workspace › My tasks
Check training status	People & Governance › Training › Matrix

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I want to…	Where to click
Log a calibration and certificate	Operations & Assets › Equipment & calibration › instrument › Log calibration
Download a calibration certificate	Instrument › Calibration history › Download certificate
Review supplier scores	Operations & Assets › Supplier quality › supplier name
Build a report	Insights & Reviews › Reports › New report
Build a recurring report pack	Insights & Reviews › Reports › Templates › New template
Export dashboard figures	Insights & Reviews › Dashboards › tab › Export PDF
Go back a page	Back arrow (top left) or click a breadcrumb
Find any record	Search records (Ctrl K / ⌘ K)
Change users, roles, MFA	Admin › Admin settings

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