Quality Link Help and Tutorial

This help and tutorial manual will provide you with the basics of getting started with Quality Link.

The document is separated into logical topics that correlate to the modules available within Quality Link and can be used as a reference as you start to build your quality system.

This document is intended for anyone new to Quality Link.

The following modules will be addressed in this help and tutorial document:
# Quality Link Help and Tutorial

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New and Enhanced Features

A Quality Management, Compliance and Productivity Solution

Quality Link® 7 provides organizations with a reliable, flexible, and cost-effective total quality management, compliance, and productivity solution.

Inspired by people and technology, Quality Link 7 builds on our experience and proven platform for helping organizations automate processes, save money, and achieve regulatory compliance with an easy to use solution.

Here is a brief summary of the more prominent new features you will find in this release and how it compares to our previous release.

New Features by Version

- New Feature | - Improved and Enhanced

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**New Feature Description**

**Login and Connectivity**
- A new user friendly login dialog with tab navigation and ability to save user id’s between logins.
- A more insightful login dialog which shows the quality system you are logged into at all times as well as the Quality Link application version number and database version number.
- A new external quality system connection file (C:\ProgramData\Quality Mapping Solutions\Quality Link\connections.config) which can be deployed to multiple workstations ensuring all users have the same quality system connection options.
- A new Quality System Connections dialog listing all of your quality systems with user-friendly names and an easy way to manage this list.
- A new Connection Properties dialog which more easily connects your user-friendly quality system name with the required SQL Server connection parameters.
- An improved experience when setting up a new quality system acknowledging the time required for database discovery with a “searching… please wait” message while Quality Link searches your network for new SQL Server instances.

Program Options
- A new, more efficient, consolidated Program Options dialog showcasing both user-specific settings as well as system-specific settings.
- New program option to ‘Change Current Password’ (allows users to manage this without requiring administrative access).
- New program option to ‘Show/Hide’ the Publishing Dialog during the publication of documents.
- New program option to automatically create (or not create) an archive when a document is published.
- New configuration file format allows multiple users to log into a quality system from the same workstation while still retaining individual (i.e. per user) options and settings.

Administration and Security
- Windows Authentication support. New functionality allows Quality Link users (via the Administration module) the ability to log into Quality Link via their Windows user id/password.
- Integrated Backup. Quality Link now supports a backup option directly within the software.
- Enhanced Experience. Prioritized list of users by status (Active, Inactive, and Suspended) in dropdowns.

Grids and Views
- Up to 10x performance improvement when loading grids with a large number of records.
- Selection pre-highlight when mouse hovers over row for easy identification prior to row selection.
- Better image management which prevents out of memory exceptions when a large number of records are loaded.
- More easily find what you’re looking with new “Search” functionality for every module and view.
- Enhanced auto-navigation whereby the most recently updated item stays selected after all relevant actions (i.e. check out, publish, route, etc…).
- Ability to save a customized grid view and restore default grid views using new tool buttons on an individual (i.e. per user and per view) basis.
- Less confusion as the ‘filter row’ is automatically displayed if a filter is applied to the current grid.
- Less confusion as the ‘filter row’ is highlighted in yellow.
- Enhanced item count display. Accurate counts when groups and/or filters are used.
- Enhanced item count display. Re-positioned from the status bar to the grid header.
- Descriptive tooltips to aid in identification of icon actions.
- New “Loading…” message during long running grid load operations.

Documents
- Office 2010 .docx file format support.
- Better image management that prevents out of memory exceptions when a large number of records are loaded into the ‘Related Documents’ tab.
- Enhanced Experience. The Related Documents browse functionality now allows for multiple selections and retains the last selected folder.
- Auto-generation of the next available Document ID when creating new documents.
- Better error notification. Incorporated error icon and error text when templates and/or template path’s cannot be found
- New ‘Show Archives’ dialog displays all archives for the selected document
- New ‘Show Distributions’ dialog displays all distributions for the selected document
- New ‘Show Reviews’ dialog displays all reviews for the selected document
- New ‘Archive Document’ action allows you to manually archive documents instead of relying on the auto-archive functionality
- New document routing functionality that allows for both routing documents ‘All at once’ or ‘One after another’.
- New ability to add ‘Publishing Comments’ to your documents during the publication process.
- Added warning notification when Effective Date occurs before the Revision Date.
- Added duplicate ID check when saving new records.

Training
- A new ‘Synchronize Training’ feature allows training administrators to visually identify, and automatically synchronize, all training items that are no longer in-sync with associated documents. For example, if your employees are trained on Revision A of a document, but you subsequently update your document to Revision B, Quality Link now automatically identifies the training that is out-of-sync, and provides a new ‘Synchronize Training’ feature that aligns your training needs and requirements with your current documentation.

Reports
- Reports can now be integrated into each of the quality modules providing easy access for all users of Quality Link.

Audits
- Enhanced editing via the enablement of cut/copy/paste for all audit findings.

Events
- Enhanced experience. Inactive and suspended users have been moved to the bottom of the list of ‘Assigned To’ users instead of being integrated with the list of active users.

Actions
- Ability to re-order tabs creating an optional custom configuration per user.
- Redesigned property dialog to use ‘tabs’ for accessing key corrective action data elements.
- Ability to retain dialog dimensions after user re-sizing.
- Added duplicate ID check when saving new records.

Categories
- Ability to categorize customers into unique, user-defined, categories.
- Enhanced ability to better categorize multiple items, belonging to more than one category, at the same time.
- Enhanced experience. The grid is ‘not’ refreshed after selecting ‘Cancel’ from the Category dialog.

Miscellaneous
- Over 250+ bugs fixes and minor enhancements throughout Quality Link.
# System Requirements

## Workstation Requirements

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<th>Operating System:</th>
<th>Client</th>
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<td>Windows 7</td>
<td>Windows Vista</td>
<td>Windows XP</td>
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</table>

- For all platforms, we recommend that you upgrade to the latest Windows Service Pack and critical updates available from the [Windows Update Web site](http://windows.microsoft.com/en) to ensure the best compatibility and security.

<table>
<thead>
<tr>
<th>Software:</th>
<th>.Net Framework 4.0</th>
</tr>
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</table>

- Quality Link will install the .Net Framework 4.0 if it is not already installed.

<table>
<thead>
<tr>
<th>Processor:</th>
<th>1 GHz (minimum); 1 GHz or higher recommended</th>
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<table>
<thead>
<tr>
<th>RAM:</th>
<th>512 MB (minimum); 512 MB or higher recommended</th>
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<table>
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<tr>
<th>Hard Disk:</th>
<th>20 MB</th>
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- You will need more hard disk space if the .Net Framework is not installed on your system. The .Net Framework 4.0 has a minimum requirement of 600 MB (32-bit) and 1.5 GB (64-bit).

## Server Requirements

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<td>Windows 2008</td>
</tr>
<tr>
<td>Windows 2008 R2</td>
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</table>

- For all platforms, we recommend that you upgrade to the latest Windows Service Pack and critical updates available from the [Windows Update Web site](http://windows.microsoft.com/en) to ensure the best compatibility and security.

<table>
<thead>
<tr>
<th>Software:</th>
<th>SQL Server 2005</th>
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<td>SQL Server 2008</td>
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<td>SQL Server 2008 R2</td>
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- Quality Link is compatible with the Express, Standard, and Enterprise editions of SQL Server. There is no additional license fee for utilizing the Express Edition, which you can download from here: [SQL Server 2008 R2 Express](http://www.microsoft.com/en-us/download/details.aspx?id=23650#system-requirements).

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<th>Processor:</th>
<th>1 GHz (minimum: 32-bit); 1.4 GHz (minimum: 64-bit); 2 GHz or higher recommended</th>
</tr>
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</table>

<table>
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<tr>
<th>RAM:</th>
<th>512MB (minimum); 2 GB or higher recommended</th>
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<table>
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<tr>
<th>Hard Disk:</th>
<th>2.2 GB</th>
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Upgrade Notes

Upgrading from Quality Link 6 to Quality Link 7 is an easy and straightforward process and should only take you a few minutes!

Performing the Upgrade

After you download and install the Quality Link 7 Upgrade Package to your workstation, perform the following steps:

1. Navigate to the Getting Started view.
2. Select the Upgrade from a previous version link.

Getting Started | Upgrade from a Previous Version

This will launch the Quality System Upgrade Wizard.

You will then need to select, or enter, properties specific to the quality system you would like to upgrade. This includes:

1. Select the SQL Server where your existing version 6 quality system resides.
2. Enter your Authentication (i.e. security details). This should be a user with privileges to make changes to the database.
3. Select the specific Quality Link Database you would like to upgrade to the new version 7 format.
Once this information is entered, you can optionally select the **Test Connection** button. This will ensure your connection parameters are valid.

4. Click the **Start Upgrade** button to begin the upgrade process.

**Quality System Upgrade Wizard**

That’s it! If everything went as planned, then you should see the progress bar reach 100% followed by the Upgrade Complete confirmation message.

You can now log in to your new your Quality Link 7 system and start enjoying the new features and enhancements!

If you have any questions during the upgrade, you can contact us at support@qmonline.com and we will help you through this process.
Installation Notes

Installing Quality Link after Downloading the Trial Edition

If you just downloaded the Free Trial Edition of Quality Link you should follow these instructions when installing the software for the first time.

1. Navigate to the location where you downloaded the Quality Link Trial Edition setup file.

2. **Double-Click** the file you just downloaded. This will extract the contents of a compressed setup file to a temporary location on your hard drive and automatically begin the installation process. The setup program will also install all pre-requisites in order to run the trial edition of Quality Link.

3. Follow the setup instructions on the screen to complete the installation.

Installing Quality Link in a Networked Environment | Server + Workstation

For a multi-computer solution you will need to install components on both your server and your workstation(s). Once Quality Link has been purchased, you will be given a login for our web site where you can obtain a “server-specific” setup file and “workstation-specific” setup file. You just need to download and install these files on the appropriate server and workstation(s).

Getting Assistance

If you need any assistance with the installation and configuration of Quality Link, feel free to contact us at support@qmsonline.com or by calling 1-888-786-3133 and we will be glad to assist you with this process.
Implementation Checklist

There are many ways to get started on the implementation of your quality system and each approach will be determined by your specific needs. However, there are a few basic tasks that apply to almost every implementation. We have outlined a generic approach in the following checklist.

Use this as a guide in your implementation of Quality Link. For your reference, you may want to print this topic and place a checkmark next to each task as you complete it.

<table>
<thead>
<tr>
<th></th>
<th>Create Quality System</th>
<th>Add Users and Groups</th>
<th>Add Employees</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<th>1</th>
<th>Create Quality System</th>
<th></th>
<th>Create a New Quality System</th>
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<tbody>
<tr>
<td>2</td>
<td>Add Users and Groups</td>
<td></td>
<td>Create New Users</td>
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<td></td>
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<td>Create New Groups</td>
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<td></td>
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<td></td>
<td>Assign Users to Groups</td>
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<td>Set Group Security</td>
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<td>3</td>
<td>Add Employees</td>
<td></td>
<td>Create New Departments</td>
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<td></td>
<td>Create New Job Descriptions</td>
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<td>Create New Employees</td>
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<td>4</td>
<td>Add Customers</td>
<td></td>
<td>Create New Customer Types</td>
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<td>Create New Customers</td>
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<td>5</td>
<td>Add Suppliers</td>
<td></td>
<td>Create New Supplier Types</td>
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<td></td>
<td>Create New Suppliers</td>
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<td></td>
<td>Schedule Supplier Evaluations</td>
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<td></td>
<td>Add Documents</td>
<td>Create New Document Types</td>
<td>Create (or Import) New Documents</td>
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<td></td>
<td>Add Training</td>
<td>Create New Training Types</td>
<td>Create New Training Items</td>
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<tr>
<td></td>
<td>Add Gages</td>
<td>Create New Gage Types</td>
<td>Create New Gage Locations</td>
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<tr>
<td></td>
<td>Add Audits</td>
<td>Create New Audit Items</td>
<td>Create New Audit Checklists and Questions</td>
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<tr>
<td></td>
<td>Add Equipment</td>
<td>Create New Equipment Types</td>
<td>Create New Equipment Locations</td>
</tr>
<tr>
<td></td>
<td>Add Faults and Actions</td>
<td>Create New Fault Sources</td>
<td>Create New Fault Locations</td>
</tr>
</tbody>
</table>

We wish you continued success as you explore each of the Quality Link modules!

There are many different ways to implement Quality Link, and it would be impossible to tell you what is best for you. Some customers begin by creating or importing their documentation, and then proceed to enter information into each of the Quality Link modules, while others take it one-step at a time and enter the information only as needed. Take your time and become comfortable with each of the modules. Rest assured that you can be successful no matter which way you choose.
Navigating Quality Link

Navigating Quality Link is both easy and intuitive. The ‘outlook-style’ navigation pane, flexible grid control, and ribbon toolbar have been implemented to give you the ultimate in flexibility while viewing, sorting, grouping, filtering, and navigating your quality information in a way that you are familiar with.

Understanding the User Interface

Ribbon Control
The ribbon control provides a single place you can navigate to in order to find a consolidated set of tasks associated with the currently selected view. The ribbon control is organized into a set of tabs, each one containing a group of related tasks. Each module and view within Quality Link will have a different set of tabs, groups, and tasks designed to make the features of Quality Link more readily available and easier to find.

Tasks
The tasks (also known as actions and/or commands) will vary for each module and view selected. These provide you with the functions needed to create and maintain the various aspects of your quality system.
Views
A view provides access to your quality system data. You will notice that each of the Quality Link modules has a unique set of views associated to them. For instance, the 'Documents' module shown above has four distinct views. Each of these views provides you with access to an organized set of data and will provide you with a different set of tasks related to your current selection.

Category Toolbar
The category toolbar provides the commands necessary to manage both system-level and user-defined categories which are associated to the currently selected view. Using the commands on this toolbar you can create, rename, delete, and secure your categories.

Categories
Categories are represented as a folder-like structure for easy navigation and organization of your quality data. The categories may be different for each of the views and can be created in a hierarchical format. Selecting a specific category will load the details in the Info Grid.

Modules
Modules provide the highest level of organization and security within Quality Link. Each module may have one or more views associated with it, which in turn determine the specific functionality available to you.

Info Grid Toolbar
The info grid toolbar provides the commands necessary for managing the display of data within the grid. The commands include a Refresh button for refreshing data in the current display, a Filter button for filtering information from your display, a Fields button for adding and removing columns from your display, a Save button for saving the current layout, filter, and sort operations which you may have applied to your grid, a Restore button to have Quality Link resort back to the ‘default’ grid layout, and a Search button that lets you locate specific items located within the grid.

Info Grid
The information grid is the main display in Quality Link and is sometimes referred to as the 'main grid'. The data displayed here is determined by the module, view, and category which has been selected. You can group columns by dragging column headers, sort columns by clicking the column header, and execute a default command by double-clicking items that appear in the grid.
Creating a New Quality System

Creating a new quality system is a relatively straightforward task. The New Quality System Wizard will guide you through the necessary steps and let you select from a list of available quality system templates to help you get up and running faster. When you create a new quality system you will be creating both the data repository (i.e. a SQL Server database) as well as the file structure (i.e. folders and sub-folders) to support your quality system artifacts.

Note: Since this step requires the creation of a SQL database you may need to enlist the support of your database administrator to ensure you (or someone else) has the correct level of permissions required to create a new quality system.

The DomainName\UserName (i.e. the user currently running Quality Link) must have a valid SQL Login and must have the authority to create databases for the selected SQL Server instance. This is typically granted via the Database Creator SQL Server role; however, you will have this ability if you are a member of the SQL Server System Administrators server role.

It is quite typical for a system administrator (or a database sysadmin) to perform this step. It is also typical to install Quality Link temporarily on the server (in the case of a multi-computer deployment) in order to ease the creation of your quality system database should you encounter remote permissions/security issues.

Create a New Quality System

1. Navigate to the Quality Link Home module.

2. Select Getting Started with Quality Link (located on the Home tab)

3. Select Create a new Quality System.
4. Select **Next** to continue. **Note the recommendation to run Quality Link directly on your server when attempting to create a new quality system. This is not required, but it often avoids permissions issues that are common when attempting to do this remotely.**
5. Select a **Quality System Accelerator**. You can elect to pre-populate your quality system with ISO-related categories and terminology, LAB-related categories and terminology, or you can just create an empty quality system where you will enter all your information from scratch.

![Quality System Accelerator Image]

6. Enter your **Company Name** in the New Quality System dialog.

The name you enter here will be displayed after logging into your quality system as well as on any documentation that uses a Quality Link template (you can always modify this name in the Company Profile module after your quality system has been created).

![Company Name Image]
7. **Select your SQL Server instance, Authentication Type, and Database Name.**

Selecting the SQL Server dropdown will cause Quality Link to search your network and populate a list of available SQL Server instances. If this list is empty, you may not have the proper privileges, or you may not have the SQL Server Browser Service running on your computer.

The Authentication mode is used to indicate whether your current DomainName\UserName will be used (i.e. Windows Authentication) or whether a SQL Server specific user ID and password will be used (i.e. SQL Authentication).

The New Database Name is the name that SQL Server will use when creating your new database. The default text is based on the company name entered in the previous step.

8. **Enter your Password.**

This is the password that will be used for your Quality Link ‘admin’ User ID. You should use this User ID and Password when logging into Quality Link for the first time and setting up your quality system. The ‘admin’ user is a ‘Quality System Administrator’ and can be used to create other users for Quality Link and set their permissions as appropriate.
9. Select your **System Location**.

This is the physical location of where your database files and quality system folder structure will be created. You must have privileges to create folders and files at the location specified. If your SQL Server is located on a networked server then you must ensure that your instance of SQL Server has access to the location specified. The database location and ensuing Quality Link folder structures which will be created are typically located on your SQL Server.
10. Review the Quality System Summary. Click **Finish** to create your new quality system.

Once you select Finish, Quality Link will begin the database creation process. Once this process completes you will be able to log into your new quality database and begin the setup of your quality system.
Module: Event Center

The Event Center is your one-stop location for every scheduled event (i.e. quality related task) that is due to maintain the quality and integrity of your environment. This module provides a view into every scheduled event due today, next week, next month, and even next year.

The Event Center consists of two primary types of events: Custom Events and System Events.

Custom events can be for anything you like (i.e. Birthdays, Anniversaries, Permit Renewals, Registrations, etc…) and can include any type of recurrence/frequency.

System events, on the other hand, are created as you manage the various elements of your quality system. System events are pre-defined by Quality Link and include the following: Document Reviews, Documents Routed for Approval, Documents Routed for Acknowledgement, Audits, Customer Activities, Equipment Maintenance, Faults, Corrective/Preventive Actions, Gage Calibrations, Gage R&R Studies, Supplier Evaluations, and Training Sessions. As you work with Quality Link and establish schedules for these quality related activities, you will be able to access all of this information in one location, the Event Center.

Schedule New Event

1. Click on the Event Center module

2. Navigate to the Views section (located on the left side of the screen), and select Events.

3. Select Schedule New Event (located on the Events tab in the top left corner of the screen)

4. The following New Event properties window will open.
When you use this feature to create your events, you will be creating ‘custom’ events. These are different from the system events that are created by executing specific tasks within other modules (i.e. Document Reviews, Audits, Scheduled Training, etc…).

5. **In the Subject box, type a description for this event.**

6. **Select a Due Date.** If the event is not marked as complete prior to this date, then it will show as overdue in your Event Center and shown highlighted in red.

7. **Select a Status from the dropdown.** If this is a new event, the status will most likely remain as ‘Not Started’. However, you have the option to select from one of many different statuses as it pertains to the current state of this event.

8. **Select a Priority from the dropdown.** The priority provides an easy way to classify your events for later sorting and grouping and lets you more easily find important events.

9. **Select an Event Type from the dropdown.** The event type provides yet another way to classify your custom events. Example event types include: Anniversaries, Birthdays, Permit Renewals, Registrations, or any other ‘type’ you may want to add. Event types are customizable so you can add, edit, and delete types that fit your unique needs.

10. **Select an Assigned To user id from the dropdown.** This determines who will be responsible for ensuring this event is completed. By default, the Assigned To user id will be that of the currently logged in user; however, you can modify this and select an alternate user as the person responsible by selecting another user from the dropdown. The Assigned To dropdown is populated with a list of active users (based on users entered in your Administration module).
11. Select a **Completed On** date. For new events, this should be left blank. However, if you are finished with this event and want to identify this as completed, then you should select the appropriate date to indicate the completion date.

12. Select a **Completed By** person from the dropdown. After completing an event, you have the option of indicating who actually finished this activity. The Completed By dropdown is populated with a list of active employee names (based on items entered in your Employee module), or it can be populated with any custom text as it is a free-form text box.

13. In the **Notes** box, type additional information as it pertains to this event.

14. Determine if the event should be marked as **Private**. Events marked as private will only be visible by the ‘Owner’ and by the ‘Assigned To’ user. Events that are not marked as private will be visible by anyone that has access to the Events module.

15. To make the event recurring, click **Set Recurrence**. This will display the Event Recurrence dialog. Select the recurrence pattern (Daily, Weekly, Monthly, or Yearly) with which the event recurs, and then select options for the frequency. Click OK.

16. Click **Save & Close** to keep your changes.

### Manage Event Priorities

Event priorities provide an easy way to classify your events for later sorting and grouping to more easily find important events. Default priorities include High, Low, and Normal, although you can modify this list and add, modify, or delete event priorities.

To modify the list of event priorities:

1. Select **Manage Event Priorities** located on the Events tab.

2. The following **Manage Event Priority** window will open. This dialog can be used to Add, Delete or Rename an Event Priority.
Manage Event Status

Event statuses allow you to quickly determine which events are complete and which events still need action. There are a variety of system-level event statuses, such as “Not Started”, “In Progress”, “Completed”, etc… However, you have the added flexibility to add and/or modify your own custom statuses.

To modify the list of event statuses:

1. Select **Manage Event Status** located on the Events tab.

2. The following **Manage Event Status** window will open. This dialog can be used to Add, Delete or Rename an Event Status.
Manage Event Types

The event type provides a way to classify your custom events. Example event types include: Anniversaries, Birthdays, Permit Renewals, Registrations, or any other ‘type’ you may want to add. Event types are customizable so you can add, edit, and delete types that fit your unique needs.

To modify the list of event types:

1. Select **Manage Event Types** located on the Events tab.

2. The following **Manage Event Types** window will open. This dialog can be used to Add, Delete or Rename an Event Type.

Note: You may not be able to modify some of the event statuses as some of them are considered system-level statuses and used internally by Quality Link. You will receive a warning message should you attempt to delete a system-level status.
Note: System-level event types are not displayed in this list as they cannot be modified. Examples of system-level event types include Audits, Document Reviews, Supplier Evaluations, etc…

Mark Event As Complete

The Mark as Complete feature is a convenient way to complete many events simultaneously. For example, if you have been out of the office for a while and discover after you return that many of the open and incomplete events are now finished, but not entered into your quality system, you do not need to worry about opening, editing, and saving each item individually. The ‘Mark as Complete’ feature can be a tremendous time saver! This feature will allow you to select all the events that need to be completed, and enable you to mark all of them complete with a single click.

To mark an event as complete:

1. Navigate to the **Info Grid** and select one or more events.

2. Select **Mark As Complete** located on the Events tab.
3. The following **Mark as Complete** window will open. Select ‘**Yes**’ to complete the selected event.

![Mark as Complete window]

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Note: Using the “Mark as Complete” feature will update the status of each selected event to “Completed”, set the “Completed On” date to the current day, and set the “Completed By” field will be set to your user id.

Optionally, you can edit individual events and select ‘Completed’ from the Status dropdown. This will have the same effect as executing the ‘Mark as Complete’ task.

---

**Set Event Recurrence**

It is quite common to have recurring events (i.e. events that happen on a regular and predetermined basis). Quality Link supports adding a frequency to any of your events that consist of daily, weekly, monthly, or yearly recurrences.

To set the recurrence/frequency of an event:

1. Navigate to the **Info Grid** and select an event.

![Info Grid]

2. Select **Set Recurrence** located on the Events tab.
The following **Event Recurrence** window will open and can be used to set the recurrence pattern for the selected event.
Module: Administration

The Administration module provides features that allow you to manage all of the users and groups within Quality Link, the permissions for each user and/or group, as well as the ability to backup and restore your quality system. You can also set your Program Options within this module. We will cover each of these topics below.

Users
A Quality Link “user” is fundamental to how an individual is recognized within Quality Link. Users can perform actions, such as logging in to a quality system, approving a document, and viewing a list of open events they are responsible for. Everything you do, and the permissions you have, are ultimately defined at the user level.

You will need to create a user for everyone that will need access to Quality Link.

Add a New User

To add a new user:

1. Select the Administration module.
2. Select the Users view.
3. Navigate to the top left corner of the Administration tab and click on New User.

The following New User properties window will open.
4. In the **User ID** box, type a unique identifier for this user. This can be anything you need it to be; however, it is common to have something identifiable, such as a first initial and last name (e.g. JDOE) as opposed to numbers, or other vague characters, which do not easily associate the ID to a person.

5. **Enter a User Name.** This is typically the full name of the user (e.g. John Doe) and is used for identification purposes only.

6. **Enter the Email associated to this user.** Certain features within Quality Link will make use of the email associated to a user id. For example, when routing documents to users and enabling the email functionality, Quality Link will prepopulate the email To: line with the email address assigned to the user.

7. **Select a Status for this user.** For new users, the status will default to “Active”. However, you can later modify this status to “Inactive” or “Suspended” if you want to restrict access for certain users without deleting them from your quality system. This is often the case when users leave the company, but you still want to maintain a historical context as they may have previously impacted certain aspects of your quality system (e.g. they may have previously approved documents, signed off on training, completed audits, etc…)

8. **Determine whether you want Quality Link Authentication or Windows Authentication.**

   **Quality Link Authentication** means that your user id and password are unique to Quality Link. There is no relationship to this user id and that of your Windows operating system (i.e. you will have a separate user id and login for Quality Link). The user id and password entered here will be used to log in to Quality Link.

   **Windows Authentication** means that your Windows password and Quality Link password will be the same. Quality Link will attempt to verify your identify by using your Windows credentials when you log into Quality Link. This has the added benefit of not having to use separate user id’s for your operating system
and your quality system. Also, any Windows password policies (e.g. password reset every 90 days, etc…) automatically apply to your quality system access as well. In order for this to work, your Quality Link user id (as entered in Step 4) must match your Windows user id exactly, including the domain name. For example, if you log into Windows with “MYDOMAIN\J Doe” then you should enter “MYDOMAIN\J Doe” as your Quality Link user id. A separate password is not required, as you will log into Quality Link with the same password you use to log into your Windows operating system.

9. Enter any Notes for this user. This is for informational purposes only.

10. Select Save & Close when finished.

Set User Permissions

It is important to set the appropriate permissions for each user in order to establish the modules and views each user has access to.

User permissions can be set for individual views within each module. For example, the Documents module contains four distinct views: the Document Master, Document Archives, Document Distributions, and Document Reviews. Depending on the needs of a particular user, you may only want to allow someone access to the Document Master view, and restrict access to the other three views found within the Documents module. You can manage this level of detail via the Administration module on a user-by-user basis.

However, it is worth noting, that a recommended best practice is to manage the module and view permissions at a group level, instead of at a user level. The reason for this is to simplify the management of your quality system. More information can be found in the section below titled “Set Group Permissions”.

To set permissions at the user level:

1. Select a user from the Info Grid.

   ![Info Grid](image)

   2. Select Set Module/View Security located on the Administration tab.
3. The following **User Permissions** dialog will be displayed and can be used to determine which modules and views the user has access to, in addition to the type of access they have.

Note: User permissions are additive. This means that even though a user may have ‘No Access’ selected for a particular view, they may still be able to access this information as a result of the groups they belong to.

‘**No Access**’ permission means exactly that. Users will have no access to the view/module (assuming they are not granted additional privileges as part of a group assignment). Users with ‘No Access’ will not be allowed to view any of the data contained within the view/module as it will be hidden from the user interface.

‘**Access**’ permission means that users will have the *possibility* to view and edit data. However, the actual permission (i.e. viewing or editing of your quality data) will be determined by the security specified at the category-level within the view itself. It is important to understand that just because a user has ‘Access’ to a view, it does not necessarily mean they can view/edit data within it. Quality Link provides an additional layer of security at the category-level within each view as well. There is a lot of detail on how to manage security successfully at this level in the “Maintaining Category Level Security” topic in this document.

‘**Administrative**’ permission means that users will be able to access everything within a particular view. They can view information, edit information, set security at the category level, and access any and all data related to the associated view.
Assign User to Groups

Ensuring that users are assigned to the correct groups is a key part of your quality system security strategy. By default, new users are added to an ‘EVERYONE_READERS’ group and an ‘EVERYONE_CONTRIBUTORS’ group. This means that new users will automatically have the ability to view and edit information in each of the quality modules. If this is not the desired behavior, then you will need to modify the groups each user is assigned to.

To assign users to groups:

1. Select one or more users from the **Info Grid**.

   ![Info Grid]

2. Select **Assign to Groups** located on the Administration tab.

3. The following dialog will be displayed and can be used to assign selected users to one or more groups.
Add a New Group

A Quality Link “group” is essentially a collection of users that require the same security requirements. Instead of maintaining security for each user, you can elect to maintain the security at the group level, and then assign the appropriate users to their respective groups. Quality Link has three distinct system-level groups (i.e. built in security groups) that users can be assigned to. These are the ADMINISTRATORS, EVERYONE_CONTRIBUTORS, and EVERYONE_READERS groups.

The “ADMINISTRATORS” group should be used for your quality system administrators only. Users assigned to this group will have access to every feature within Quality Link, including the ability to set and maintain security requirements for other users.

The “EVERYONE_CONTRIBUTORS” group is a default group that all new users are automatically added to. This ensures that new users have the ability to add, modify, and remove content in each of the categories, views, and modules within Quality Link. If you do not want users to have this level of access after being added, then you can reassign them to a different group or remove this group from the category-level security that is applied within each module. More information on how this impacts category-level security is addressed in the “Maintaining Category Level Security” topic later in this document.

The “EVERYONE_READERS” group is another default group that all new users are automatically added to. This ensures that new users have the ability to view content in each of the categories, views, and modules within Quality Link. If you do not want users to have this level of access after being added, then you can reassign them to a different group or remove this group from the category-level security that is applied within each module. More information on how this impacts category-level security is addressed in the “Maintaining Category Level Security” topic later in this document.

To add a new group:

1. Select the Administration module.
2. Select the **Groups** view.

![Adminstration View]

3. Navigate to the top left corner of the Administration tab and click on **New Group**.

![New Group Properties Window]

The following New Group properties window will open.

4. **In the Group ID box**, type a unique identifier for this group. This can be anything you need it to be. Perhaps you have different security requirements for a Marketing, Engineering, or Auditors group.

5. Select **Save & Close** when finished.
Set Group Permissions

Although permissions can be set at the user level, it is a **recommended best practice to set permissions at the group level**. You can simplify the security management of your quality system by following this best practice. You will essentially assign users to groups, and then set the security at the group level.

For a more detailed explanation of the various permission levels (No Access, Access, and Administrative) see the prior section titled “Set User Permissions”.

To set permissions at the group level:

1. Select a group from the **Info Grid**.

   ![Groups Grid](image)

   - **Administrators**
   - **Everyone Contributors**
   - **Everyone Readers**
   - **Policy Approvers**
   - **Procedure Approvers**

2. Select **Set Module/View Security** located on the Administration tab.

   ![Administration Tab](image)

3. The following **Group Permissions** dialog will be displayed and can be used to assign module and view permissions to the selected group. The selected level of access will apply to all users assigned to this group.
Assign Groups to Users

To assign a group to one or more users:

1. Navigate to the **Info Grid** and select one or more groups.

2. Select **Assign to Users** located on the Administration tab.
3. The following dialog will be displayed and can be used to assign the selected groups to one or more users.

Manage Program Options

The Quality Link Options dialog is used to manage settings that are specific to your installation of Quality Link. There are two types of program options: user-level options and system-level options. User-level options are specific to the current user, and include settings such as your Startup Module, Document Preferences, and the ability to Restore Program Defaults. System-level options apply to every user accessing your quality system, and include settings such as where documents are stored on your file system, what templates are used, and other system-wide settings.

You will use the same Quality Link Options dialog to manage both user-level and system-level options. However, you must have administrative access in order to modify any of the system-level settings.

To modify your program options:

1. Select Program Options. This is available in two locations within Quality Link. You can access this via the Home tab, or also on the Administration tab. Opening the Program Options from either location will display the same dialog. The example below shows this being accessed from the Home tab.
User – Settings and Options

The Settings and Options panel provides the initial set of user-level options you can modify.

**Startup Module** – Your selection here determines which module Quality Link will default to after your initial login. Common startup modules are the Event Center (to see if you have any quality related tasks due today) and the Documents module (this is just a very common module); although you can select any of the modules you have access to as your startup module.

**Email** – You have the option to determine if Quality Link should attach “Related Documents” to emails initiated from within Quality Link.

**Event Privacy** – You can use this option to determine if all new events are created with the “Private” checkbox selected, or unselected. Events marked as “Private” will only be visible to the Owner of the event and to the person the event is “Assigned To”.
**Program Defaults** – If you ever have the need to restore Quality Link to its original settings then you can elect to “Restore Program Defaults”. Selecting this button will restore all of your grid configuration settings, sort order, group by, fields displayed, etc… This is a user-level setting, so only the current user will have their settings restored.

**User – Password**

The Password panel provides users with the ability to reset their own password.

![Password Panel](image)

**Password** – After entering your current password correctly, you can specify a new password. You will also have to confirm your new password by re-entering this correctly. After you have done this, you can click “Change Password”, which will then apply the changes and update your password accordingly.

**User – Documents**

The Documents panel lets users decide what they would like to do after double-clicking a document and whether or not they want to see the publishing dialog during the publication process.
Document (Double-Click) Action – By default, Quality Link will attempt to open a document in the source application when it is double-clicked. For example, if your document ends with a .doc or .docx extension, then Quality Link will attempt to open this in Microsoft Word since these file extensions are typically associated with that program. Optionally, you can instruct Quality Link to open the document properties dialog when it is double-clicked.

Document Publishing – When you publish a document in Quality Link a dialog is opened that shows the publishing process. This may be useful if you are publishing many documents at the same time so you can see the status and estimate the time to completion. However, if you are only publishing one document at a time you may not wish to see the dialog displayed each time you publish a document. This option gives you the opportunity to choose whether you want to see the publishing dialog every time you publish a document.

System – File Locations

The File Locations panel represents system-level settings, which are global in nature, and affect all users of Quality Link, unlike the previous program options. The File Locations panel establishes the options that control where files that Quality Link manages are physically stored on your file system/server.
**System Location** – The system location represents the “root” location for all of your quality system documents. The value entered here is the path “prefix”, and when coupled with the File Locations path “suffix”, Quality Link will know how to access and save your files.

**File Locations** – The various File Locations (e.g. Published Documents, Archived Documents, Workspace Documents, etc…) represent the relative location for each of the external quality system artifacts (i.e. those items not stored in the database).

Note: The complete path, which Quality Link will use when attempting to access these locations on behalf of the user, is comprised of the [System Location + File Location]. These locations must exist and be accessible in order for users to have access to the information stored here.

**System – Templates**

Templates provide a standard look and feel to your documentation, so if you are looking to adhere to a common layout for your documents, then you should consider leveraging one or more template designs within Quality Link. The Templates panel is where you can select the “default” template that is applied to new documents, distributed documents, and archived documents.
Default Template for Viewing Online Documents – The Template File selected here will be used as the “default” template when creating new documents. However, you can always select a different template after creating a new document from the document properties dialog if the default template does not apply. The Template Text is the text that is displayed should you decide to use a special template field (e.g. QL_TemplateText). More information regarding templates and how to apply them can be found in the Creating and Managing Document Templates section.

System – Documents

The system-level Documents panel lets your System Administrator decide if users should be required to re-enter their password before approving documents (re: some standards require this for compliance), or if Quality Link should automatically archive documents after each time they are published.
Document Approval Options – This section of the Documents panel allows you to choose between requiring a password upon document approval and not requiring a password upon document approval. This option will optionally display a password field on the document approval dialog pending whether or not this is enforced as a system-level option. The default option is not to require a password for document approvals; however, certain standards and regulatory bodies require this, so make sure you check your specific quality requirements to ensure you have the proper options selected for your quality system.

Document Archive Options – The document archive option lets you choose whether you would like to have Quality Link automatically create an archive of a document every time it is published. This is a great way to ensure that you always have a backup for any one of your published documents! By default, Quality Link will automatically create an archive of a document each time it is published.

System – Security

The security panel lets you set additional security options that are enforced globally and affect every user of Quality Link.
User Impersonation – The user impersonation enables an alternative means of protecting documents from being accessed outside of Quality Link. By default, Quality Link will use the credentials of the logged in user when accessing documents and other artifacts referenced from within Quality Link. This means that each user must have access to the physical location of where documents reside. Alternatively, you can elect to use a specified account for accessing these resources.

System Auditing – The system auditing section lets you specify whether user activity should be logged or not logged. The system auditing features will track successful and failed user logins, in addition to document activity including when, who, and how a document was accessed.
Module: Audits and Assessments

The Audits and Assessments module provides you with all of the tools you need to manage the entire audit process. You can schedule one-time audits, or recurring audits, each based on a customized checklist and set of questions that pertain directly to your organization. In addition, we offer numerous reports to help you through this process including a planned vs. performed chart, upcoming audits, as well as a pre-populated Audit Assessment Worksheet to accommodate a paper trail and the manual processes sometimes associated with audits.

Completing an audit within Quality Link is a two-step process. First, you need to schedule the audit (i.e. determine when it is due and what questions you would like to ask). Second, you need to complete the audit (i.e. enter the findings and associated details).

However, before you begin the first step (i.e. scheduling an audit); you will need to create your Audit Items. Audit items represent the “master” record, or things you would like to audit. Just as you need a supplier before you can order parts from that supplier, you will need an audit item before you can schedule an audit.

Note: Depending on your choices when you created your quality system, you may or may not have a default set of audit items. If you do not, then you will have to add your own audit items before you can perform an audit.

Add a New Audit Item

To add a new audit item:

1. Select the Audits and Assessments module.
2. Select the Audit Item Master view.
3. Navigate to the top left corner of the Audits and Assessments tab and click on New Audit Item.

The following New Audit Item properties window will open.
4. In the **Audit Item ID** box, type a unique identifier for this Audit Item. This identifier will distinguish this audit item from other audit items in your system. Common audit item identifiers include “4.0 Management System” and “5.0 Management Responsibility” for the manufacturing industry, or “Accreditation – Anatomic Pathology” and “Accreditation – Cytopathology” for the laboratory. However, you can add any items you want; you do not have to use just the built-in lists. Use an Audit Item ID that makes sense for you and your organization.

5. Enter any **Notes** for this audit item. This is for informational purposes only.

6. Select **Save & Close** when finished.

**Schedule an Audit**

Audits represent one of the building blocks for keeping your organization compliant. It is common to schedule recurring audits to ensure the quality of your organization remains as high as possible. Follow the steps below to schedule a new audit.

To create a new audit:

1. Select the **Audits and Assessments** module.

2. Select the **Audits** view.
3. Select **New Audit** located on the Audits and Assessment tab.

The following **New Audit** properties window will open.

4. **In the Audit Item** dropdown, select the audit item that you will use for this audit. This list is populated from the existing set of Audit Items as described in the previous topic: Add a New Audit Item.

5. **Select a Lead Auditor.** The lead auditor represents the person responsible for executing this audit. The dropdown list of available lead auditors is dynamically generated from your active employees (i.e. any employee with an “Active” status in the Employee module will be displayed in this list). You can optionally type any name you like into this free-form text box.

6. **Select a Point Rating.** The audit point rating is an optional field that records the “rating” of your audit. Point ratings are selected “after” you complete the audit and when you can reliably indicate the level of success or failure. For more information, refer to the topic “Manage Point Ratings”.
7. Determine if the audit should be marked as **Shows Improvement**. Shows Improvement is an informational field used to indicate whether the audit has shown marked improvement from a prior audit. The use of this field is optional and can be selected/de-selected pending your specific needs.

8. In the **Subject** box, type a description for this audit. Quality Link will automatically create a default Subject for you after selecting and Audit Item from the dropdown; however, you can modify the default text if needed.

9. **Select a Due Date.** If the audit is not marked as complete prior to this date, then it will show as overdue in your Event Center and shown highlighted in red.

10. **Select a Status from the dropdown.** If this is a new audit, the status will be set to “Not Started”. However, once the audit is complete, you should modify the status to reflect the outcome of the audit (e.g. “Pass” or “Fail”, “Major Nonconformance” or “Minor Nonconformance”, etc…)

    If the default list of statuses does not fit your needs, you can always add new statuses to the list of available options. Refer to the topic “Manage Event Status” for more information on how to add new statuses.

11. **Select a Priority from the dropdown.** The priority provides an easy way to classify your audits for later sorting and grouping and lets you more easily find important audits.

    If the default list of priorities does not fit your needs, you can always add new priorities to the list of available options. Refer to the topic “Manage Event Priorities” for more information on how to add new priorities.

12. **Select an Assigned To user id from the dropdown.** This determines who will be responsible for ensuring this audit is completed. By default, the Assigned To user id will be that of the currently logged in user; however, you can modify this and select an alternate user as the person responsible by selecting another user from the dropdown. The Assigned To dropdown is populated with a list of active users (based on users entered in your Administration module)

13. **Select a Completed On date.** For new audits, this should be left blank. However, if you are finished with this audit and want to identify this as completed, then you should select the appropriate date to indicate the completion date.

14. **Select a Completed By person from the dropdown.** After completing an audit, you have the option of indicating who actually finished this activity. The Completed By dropdown is populated with a list of active employee names (based on items entered in your Employee module), or it can be populated with any custom text as it is a free-form text box.

15. Determine if the audit should be marked as **Private**. Audits marked as private will only be visible by the ‘Owner’ and by the ‘Assigned To’ user. Audits that are not marked as private will be visible by anyone that has access to the Events module.

16. **Select the Questions & Findings tab to display the set of questions for this audit.** When first scheduling an audit you will just have the set of questions to enter. These questions are entered separately, or inserted from an existing checklist by selecting the **Insert Existing Checklist Questions** button.
After the scheduled due date approaches, and you finish conducting this audit, you will use this same tab to record the status of each question and the associated findings. The example below shows what a completed Questions & Findings tab for checking the safety of fire extinguishers might look like.

17. Select a **Status** that accurately describes the outcome of each question. For scheduled, but not completed, audits, this is typically “Not Started”. Once the audit is complete you should update the status to reflect the outcome, examples include “Conforming”, “Major Nonconformance”, “Minor Nonconformance”, “Pass”, “Fail”, or any other descriptive status you would like to use to convey the result. You can add additional statuses to reflect the terminology used by your organization if the built-in status descriptions are not sufficient (refer to the topic “Manage Event Status” for more information on this).

18. Enter a detailed **Finding** for each question. This answer (i.e. the finding) which is discovered when performing the audit.

19. Enter additional information such as **Root Cause, Auditor, Auditee, Point Rating, Shows Improvement, Related Corrective Action, and References** as needed. These additional fields are all optional, but the more information you maintain about your audits, the more reporting and insight you will gain to help ensure the quality of your organization is continually improving.

20. You can also elect to assign a new corrective action to a question that results in a major or minor nonconformance. Selecting the **Assign New Corrective Action** button will open the Corrective Actions dialog where you can schedule a follow up activity to address the issue. This option lets you proactively ensure that you follow up on a question that under performs your expectations and have that corrective action directly related to an audit.

21. Navigate back to the **General** tab and select **Save & Close** when finished.
**Import Audit Questions**

Sometimes you might find that you have many audit questions that reside in other systems, or in other formats, and the process of manually entering these into Quality Link is taking too much time. In this case, you may be able to take advantage of the Audit Import feature.

Quality Link uses a standard XML format for importing Checklists and Audit Questions. The format consists of a Checklist element followed by a ChecklistID and an AuditQuestion element followed by the QuestionID and Question.

There is a sample file called *myAuditImportSample.xml* that contains the required XML format. This is available in the Quality Link Program Files folder that is available after installing Quality Link. If you want to import audit questions into Quality Link, then you will have to put your questions into this format before the import can succeed.

Here is an example of the required format:

```
<xml version="1.0" encoding="utf-8">
  <checklist checklistId="Sample Checklist">
    <AuditQuestion questionId="Q.01" question="What is the answer for sample question 1?"/>
    <AuditQuestion questionId="Q.02" question="What is the answer for sample question 2?"/>
    <AuditQuestion questionId="Q.03" question="What is the answer for sample question 3?"/>
    <AuditQuestion questionId="Q.04" question="What is the answer for sample question 4?"/>
  </checklist>
</xml>
```

To import audit questions:

1. Navigate to the Audits and Assessments tab and click on **Import Questions**.

   ![Import Questions](image)

This will open the “Select an Audit Question Import File” dialog.
2. Select the compatible audit question import .xml file and click Open.

Note: The file shown in the dialog above is for illustrative purposes only. You will need to create your own audit question import file that conforms to the required format before attempting to import audit questions in this manner.

Manage Checklists & Questions

Quality Link provides a means to create your own audit checklists and manage the questions associated with these checklists. This provides you with an easy way to manage the list of available questions used by your organization.

To manage audit checklists and questions:

1. Navigate to the Audits and Assessments tab and click on Manage Checklists & Questions

The following dialog will be displayed and can be used to Add, Modify, and Delete audit questions for the selected checklist.
A) Audit Checklist Dropdown – Selecting this dropdown will let you select the checklist Quality Link will use. The set of questions displayed will be different depending on the checklist selected.

B) Manage Audit Checklists – Selecting this button will open the “Manage Audit Checklists” dialog. You can use this dialog to create new checklists, rename existing checklists, and delete checklists.
C) **Row Selector** – Select the Question ID or Question to modify the current contents of the record. You can also select the entire row and press the <delete> key on your keyboard to remove a question from the current checklist.

D) **Click to Add a New Question** – Click inside this box and enter the text associated with your new question. After pressing <enter> the question will be added and associated to the currently selected checklist.

E) **Import Questions** – Select this button to open the Import Questions dialog. This option is useful if you will be using the .xml formatted import file discussed in the previous section.

**Manage Point Ratings**

The audit point rating is an optional field that records the “rating” of your audit. By default, Quality Link uses a generic 0-10 point rating system. However, it is not uncommon to modify these ratings and add descriptive terms after the numerical rating, such as “10 – Highly Satisfactory” all the way to “0 – Unsatisfactory”. The value used for a point rating system should determine the level of success (compliance) or failure (non-compliance) associated with an audit.

To manage audit point ratings:

1. Navigate to the Audits and Assessments tab and click on **Manage Point Ratings**.

2. Add, Delete, Rename your point ratings as appropriate. Select **Close** when finished.
Email an Audit

You may find the need to email your audit questions and findings to other users of Quality Link, or even to external people. Quality Link provides a quick and easy way to gather up all your audit data and copy it directly into an email ready for sending.

To send audit detail via email:

1. Select the **Audits** view.

2. Navigate to the **Info Grid** and select an Audit.

3. Select **Email Audit** located on the Audits and Assessment tab.

   This will launch your <default> email program and populate the message with the audit information (as shown below).
Set Audit Recurrence

Most audits are conducted on a regular basis and require some level of frequency (i.e. monthly, semi-annually, annually, etc…). Quality Link provides a mechanism via the use of a ‘Set Recurrence’ feature to assist with setting the frequency of your audits. Quality Link will automatically generate the next audit for you to help ensure you never miss one of your important scheduled quality events.

To set the recurrence pattern (i.e. frequency) of an audit:

1. Navigate to the **Info Grid** and select an audit.
2. Select **Set Recurrence**.

The following **Event Recurrence** window will open and can be used to set the recurrence pattern for the selected audit.

After an audit is completed, which is determined by updating the [Status] or entering a [Completed On] date, a new audit is scheduled automatically based on your selected recurrence pattern. Audit information, including Audit Questions, will be populated for you in the new audit. The new audit will also be scheduled in the Event Center.
Module: Company Profile

The Company Profile module is where you will enter and maintain information about your company. Basic information such as your company name, address, phone, etc… is stored in this module. In addition, you can utilize this module to maintain your corporate mission statement, as well as other important information about your organization.

Note: The company name, as entered in this module, is used throughout Quality Link and may impact documentation that uses the standard Quality Link template. This is because the [Company Name] field is commonly used in the header and/or footer of most documents.

Edit the Company Profile

To edit your company information:

1. Select the Company Profile module.

2. Select your company from the Info Grid.

3. Select Edit Company Profile located on the Company Profile tab.

The following Company properties window will open.
4. In the **Company Name** box, type the name of your company. This will be used throughout Quality Link and will be included in any document that uses an out-of-the-box template. This information will also be used in any of the out-of-the-box reports.

5. In the **Address, City, State/Province, and Zip/Postal Code** boxes, enter the respective data. The text contained in these fields is informational only.

6. Select a date from the **Founded** dropdown. The date founded is informational only and does not impact other areas of Quality Link.

7. In the **Phone, Email, and Web Site** boxes, enter the relevant data. The text contained in these fields is informational only.

8. In the **Notes** box, enter any additional information you would like to maintain about your company. The text contained in this field is informational only.

9. You can optionally choose to select the **Mission Statement, Annual Meetings, Information Requests, Board of Directors, Corporate Offices, and Stock Exchange Listings** tab to continue storing information about your organization within Quality Link. The text contained in these fields is informational only.

10. Select **Save and Close** when finished.
**Module: Customers**

The Customers module categorizes and manages all of your customer contacts and activities. The module provides an easy and effective way to integrate customer-related data into your quality management system.

**Add a New Customer**

1. Navigate to the Customers module and select the Customers view.

2. Navigate to the top left corner of the ribbon bar and click on New Customer.

The following New Customer properties window will open.
3. **In the Customer Name box, enter a name for your customer.** The name entered here is referenced throughout other areas of Quality Link. For example, when creating faults or corrective actions with a source of “Customer”, a dropdown list of customer names is displayed. This list is populated from the customers you enter in this module.

4. **Select a Customer Type from the dropdown.** The customer type provides a way to classify your customers. Example customer types include: Advertising, Healthcare, Manufacturing, Consumer, or any other ‘type’ you may want to add. Customer types are customizable so you can add, edit, and delete types that fit your unique needs.

5. **Select a Referred By name from the dropdown.** The referred by field is informational only and lets you maintain referral information for each customer. The list is automatically populated from employees entered into your quality system; however, this is a free form field and you can enter any information into this field.

6. **In the Responsibility dropdown, select (or enter) the name of the person responsible for this customer.** This is an informational field used to maintain the primary person responsible for this customer. The dropdown is populated with a list of employees; however, this is a free form field and you can enter any information into this field.

7. **Select a Status for this customer.** For new customers, the status will default to “Active”. However, you can modify the status to “Inactive” or “Suspended” as needed. Optionally, you can add additional statuses by selecting “Manage Customer Status” from the “Manage” section located on the Customers tab for this module.

8. **In the Reference # box, enter a distinguishing id for your customer.** The reference number is for informational purposes only and is generally used to track something other than the customer name in order to uniquely identify the customer.

9. **In the Address, City, State/Province, Zip/Postal Code, Business, and Business Fax boxes, enter the respective data.** The text contained in these fields is informational only.

10. **In the Email and Web Address boxes, enter the respective data.** The email address entered here populates the [To:] line of an email after selecting “Email” located on the Customers tab for this module.

11. Select **Save & Close** when finished.
Email a Customer

1. Navigate to the **Info Grid** and select a customer.

![Info Grid](image)

2. Select **Email Customer** located on the Customers tab.

Your *default* email editor will open and the *To:* line will be pre-populated with the customer’s email. You can then compose your customer email and send when ready.

Manage Customer Types

Customer types can be used to help classify and organize your customers. You can group your Info Grid by customer type for easy reference as well.

1. Select **Manage Customer Types** located in the Customers tab.

![Manage Customer Types](image)

2. The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** customer types.
Manage Customer Status

1. Select **Manage Customer Status** located in the Customers tab.

2. The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** the customer status.
Manage Contact Information

1. Select **Contact Information** located in the Customers tab.

2. The following Contact Information dialog will be displayed and can be used to Add, Delete, and Rename all of your contacts for the selected customer.

Add a New Customer Activity

Customer activities can be used to manage and document your customer interaction. This is where you can log your sales calls, support calls, meetings, presentations, or other relevant customer activity.

1. Select the **Customers** module.
2. Select the **Customer Activities** view.

3. Navigate to the top left corner of the ribbon bar and click on **New Customer Activity**.

4. The following New Customer Activity properties window will open.

5. Input the new customer activity. Use the [Notes] section or the [Custom Fields] section to input additional data. If you have other activities to enter, then click the **Save & New** button.
**Manage Activity Types**

Activity types can be used to help classify and organize all of your customer activities (e.g. Sales Calls, Presentations, Customer Meetings, etc…). You can group your Info Grid by activity type for easy reference as well.

1. Select the **Manage Activity Types** task from the Customers tab.

![Manage Activity Types](image)

The following dialog will be displayed and can be used to Add, Delete, and Rename the activity types.

![Manage Customer Activity Types](image)

**Set Customer Activity Recurrence**

If you have recurring activities for your customers you can easily schedule a follow up at a frequency that best suits your need.

To schedule a recurring customer activity:

1. Select the Customer Activity you would like to schedule a recurrence for from the **Info Grid**.
2. Select **Set Recurrence** located on the Customers tab.

The following Event Recurrence dialog will be displayed. Use this dialog to set the recurrence schedule for your customer activity.

3. Select the **Recurrence Pattern** and **Range of Recurrence**. Click **OK** to save your changes.
Module: Documents

The Documents module is arguably the most used module within Quality Link, and it is essential that you learn how to become proficient in the many features found within it. This module represents the central repository for all of your documentation, and every document you create will be stored and managed from within this module.

The process by which you will manage your documentation will vary from one organization to the next; however, certain elements will remain consistent (e.g. creating documents, approving documents, publishing documents, etc…). The following pages in this section will guide you through these aspects of document management, as well as other more advanced features such as document reviews, document security, document acknowledgements, and creating customized templates.

Creating a New Document

To create a new document:

1. Select the Documents module.

2. Select the Document Master view.

3. Navigate to the top left corner of the ribbon bar and click on New Document.

The following New Document Properties window will open.
4. Input the New Document properties. Use the notes section and/or the custom fields section to input additional document data. Select the Edit Document Source icon on the top of the New Document Properties dialog to modify the contents of the document. Click the Save & Close button when you are finished. If you have additional documents to enter click the Save & New button.

Below is a description of the commonly used document properties and how you might consider using them for managing your documents.

**Commonly Used Document Properties**

**Document ID** – This is the primary ID used for identifying your documentation and will be used throughout Quality Link when references to your documentation are needed. This field can be up to 255 characters in length. In addition, Quality Link will pre-populate the Document ID when creating a new document based on the last document created in your quality system. For example, if your previous document had an ID of “Doc5001”, then the default new document ID will be “Doc5002”. You can override this value if you choose.

Note: The document ID is also used to construct part of the physical filename for your document source file; therefore, you should not use any illegal filename characters in your document ID. Illegal characters include the following: \ / : * ? " < > |

**Title** – This is a descriptive definition of your document. For example, if your Document ID is ‘Q4.01’, then perhaps your Title would be ‘Management Responsibility’. This field can be up to 255 characters in length.
Revision ID – This is the revision level for your document. This field must be manually updated and is typically used to help indicate whether or not a modification has been made that requires attention and/or acknowledgement from interested parties. If you find a typo in your published documentation, you may want to check out your document and fix the error, but you may not want to have users re-acknowledge this modification; therefore, you may not find it necessary to modify the Revision ID.

Document Type – The Document Type is a descriptive field that classifies the various types of documentation you may have. While some users rely completely on categories for the classification of documents, you may find that you need an additional level of classification as a way to better sort and/or view information. You can assign a Document Type to assist with this. Common examples include identifying documents as: Policies, Procedures, Work Instructions, etc…

Revision Date – The Revision Date is a descriptive field used to indicate when the document was revised. You should update this field if you change the Revision ID.

Effective Date – The Effective Date typically indicates the date a document will become valid/effective for an organization. It is often the case where the effective date will match the revision date, especially in cases where a document is published on the same day it was revised. However, it is also possible to have an effective that is different from the revision date due to delays in approving the document and/or intentionally setting an effective date for some time in the future (i.e. a published 401k policy for next fiscal year). It is up to the discretion of the document author to determine when, and if, this field will be used for managing your documentation.

Responsibility – This field is for informational purposes and indicates the person(s) responsible for this document. This is a dropdown field populated with a list of active employees, but can be overridden with your own text entry. This field can be up to 255 characters in length.

Authors – The Authors field indicates who the author(s) is for the document. This field is for informational purposes and, if used, is generally included in your document template to display the list of authors on your published documentation. This is a variable length field so it can accommodate multiple authors as well as carriage-return line feeds (i.e. CRLF) so each name prints on a separate line.

Template – This field lets you select a template for the current document. The template will be applied when you edit, preview, or publish the existing document. The templates you see in this dropdown are built from the template files that exist in your ...\Templates quality system folder. Quality Link® uses Microsoft Word® as the default editor for your quality documentation and any templates you create must use the Microsoft Word template format (.dot). If you do not wish to use a template or have other file formats you would like to include in your quality system then you can select ‘(None)’ from the template dropdown. Selecting ‘(None)’ as your template will ensure that any document type can be included in your quality system and all existing formatting will remain intact.

Templates implement a standard set of formatting for your documentation and can be established on a per document basis. For example, you might have one type of template for your corporate policies and a completely separate template for your corporate procedures. You can even create your own templates or customize the ones that ship with Quality Link. More information on creating and customizing templates can be found in the section for Creating and Managing Document Templates.

Published By – This is a read-only field that displays the ID of the user (i.e. the User ID) that published this document. This field will be empty when creating new documents and then automatically populated by Quality Link during the document publishing process.
Published On – This is a read-only field that displays the date and time indicating when the document was published. Similar to the Published By field, it will be empty when creating new documents and then automatically populated by Quality Link during the document publishing process.

Checked Out By – This is a read-only field that displays the ID of the user that Checked Out the document. This field will only be populated after a document has been published and then checked out for modification.

Checked Out On – This is a read-only field that displays the date and time indicating when the document was checked out. More information regarding the Check Out process can be found below in the Checking Out Documents section.

Version – The Version field is a system-level numeric ID that is automatically incremented each time a document is checked out. Unlike the Revision ID, you cannot modify the value of this field.

New documents will automatically be assigned a version number of 1. Should you decide to publish your initial draft document; the published document will maintain the same version number (i.e. 1). It is only when you later check out the document that you will see the version number automatically incremented. In this case, a checked out version of the published document would have a version number of 2.

Some users like to include the actual version number in their printed documentation. This can be accomplished via a custom template. Or, you may choose the more common approach of just relying on the Revision ID. It is common for both the Revision ID and Version number to have different values.

Status – The Status field is a system-level indicator used by Quality Link to help manage the document lifecycle. A document can exist in any one of the following statuses listed in the following Table 1.
Table 1. Document Status Values and Descriptions

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>A document will have an ‘Approved’ status only after a document is routed for approval and all routing members have elected to approve the document. In addition, even if all routing members approve the document – you may still not see a document with this status. For example, if you accept the default route for approval option to ‘automatically publish the document after approval’ the document will move through the Approved state directly to a Published state.</td>
</tr>
<tr>
<td>Archived</td>
<td>Every document archive will have an ‘Archived’ status. By default, documents are automatically archived each time you publish a document. You can change whether or not Quality Link automatically archives documents from within the Program Settings dialog.</td>
</tr>
<tr>
<td>Checked Out</td>
<td>A ‘Checked Out’ status will be applied to your document after successfully executing the ‘Check Out Document’ task. You can only check out documents that have been previously published and these documents will only be able to be viewed and edited by yourself and Quality Link administrators. Other users will not be able to view or edit a document checked out to another user. More information regarding checking out documents can be found in the Checking Out Documents section.</td>
</tr>
<tr>
<td>Draft</td>
<td>A ‘Draft’ status is only applied to new documents. This status indicates that the document has never been published. In addition, ‘Draft’ documents are only able to be viewed and edited by the document creator/owner and Quality Link administrators.</td>
</tr>
<tr>
<td>External</td>
<td>Documents with an ‘External’ status indicate that they have been linked to your quality system via the Document Import Wizard. It is important to understand that documents with an ‘External’ status may not reside within your ...\Documents quality system folder. External documents have restrictions that prevent them from being edited and/or published. This limitation is enforced as other (non Quality Link) applications may be using this file. Note: Deleting a document with an ‘External’ status will not delete the source file associated to this document.</td>
</tr>
<tr>
<td>Published</td>
<td>Documents with a ‘Published’ status indicate that they are ready to be viewed by users other than the author. If other users have access to the Documents module and have been granted either the Reader Role, or the Contributor Role, for the selected category, then they will be able to view the published document. You must execute the task ‘Publish Document’ in order for this status to be applied. More information can be found below in the Publishing Documents section.</td>
</tr>
<tr>
<td>Rejected</td>
<td>A document will have a ‘Rejected’ status if it is routed for approval and subsequently rejected by one or more routing members. The routing originator (i.e. the person that started the route) must delete the routing information, make the requested modifications, and re-route the document should you require approvals before publishing your documents.</td>
</tr>
<tr>
<td>Waiting for Approval</td>
<td>A document will have a ‘Waiting for Approval’ status after it has been routed for approval but has not yet been approved or rejected by all of the routing members. Once each of the routing members complete their approval request, the ‘Waiting for Approval’ status will either change to ‘Approved’ or ‘Rejected’ depending on the actions of the routing members.</td>
</tr>
</tbody>
</table>
Editing a Document

Editing a document in Quality Link can mean one of two things: 1) you want to edit the properties of an existing document, or 2) you want to edit the source file associated with an existing document. This section will cover both topics starting with the editing of your document properties.

Editing Document Properties

To edit the properties of a document you will need to:

1. Navigate to the Info Grid and select a document.

2. Select Edit Properties located on the Documents tab. This will open up the Document Properties dialog. Optionally, you can double-click the selected document to open this same dialog.

Editing a Document Source File

To edit the source file associated with a document you will need to:

1. Select the document you would like to edit the source file for from the main information grid.
2. Select **Edit Document Source** located on the Documents tab.

   If the document does not yet have a source file associated to it, then Quality Link will attempt to create a new source file based on the template assigned to this document. If a template was not specified, then Quality Link will create an empty Microsoft Word® file for you to begin editing.

   For existing and/or imported documents, Quality Link will open the file based on the associated application file extension. For example, `.doc` and `.docx` files will open in Microsoft Word (see image below), whereas `.xls` and `.xlsx` files will open in Microsoft Excel.

   ![Example: Microsoft Word displayed after selecting Edit Document Source](image)

**Deleting a Document**

Deleting a document in Quality Link is simple, but it is important to understand the implications it may or may not have within your quality system.

To delete a document you must:

1. Navigate to the **Info Grid** and select the document you would like to delete.
2. Select **Delete Document** located on the Documents tab. You will be prompted with a confirmation dialog. Select ‘Yes’ to confirm the delete.

Most of the time, you can delete documents without any issue. However, there are certain situations that require a greater understanding of how a document is related to other artifacts within your quality system. For example, what if you have distributions that relate to the document you just deleted? Luckily, Quality Link prevents you from deleting such a document.

If you try to delete a document that has distribution records you will receive the informational dialog displayed below.

![](Unable to Delete Document.png)

*Informational dialog – Attempting to delete documents with related distributions*

However, you will not receive this warning, nor will you be prevented from deleting documents that are used as a related document somewhere else in your quality system. Fortunately, Quality Link provides an easy way to discover this type of information prior to deleting a document. You can select the [Show Related Documents] task to ensure the document you are deleting will not negatively impact other documents in your quality system.

**Important:** Deleting a document will also delete the source file associated to the document. There is an exception for “external” documents, in which case source files are not be deleted. See “External” status for more detail.

**Printing and Previewing Documents**

Although Quality Link is designed to be a fully functional on-line solution for your document management needs, it is often required that you have the ability to print your documentation rather than just preview it online. This section offers basic guidance for using the print/preview capabilities of Quality Link.

1. Navigate to the **Info Grid** and select a document.

2. Select **Print Document** or **Preview Document** located on the Documents tab.
Depending on the source file of the selected document, and whether or not a Quality Link template is used, one of two things will happen. If the document uses a Quality Link template then it will automatically be sent to your default printer or opened in preview mode pending your selection. If, however, the document does not use a Quality Link template then the application associated to the file extension of the source file will open. You will then have to select the print or preview option from within that application to continue your selected operation.

Emailing Documents

You can quickly and easily send a copy of a document to someone by utilizing the email integration capabilities of Quality Link. This is a great way to keep everything in your quality system intact, but still share valuable information with other people at important times.

1. Navigate to the Info Grid and select a document.
2. Select Email Document located on the Documents tab.
Your default email editor will open and the selected document will be added as an attachment to your email. You can then compose your email and send when ready.

Example – Microsoft Outlook opened as the default email editor with the document’s source file attached
Publishing Documents

Overview
When an author first creates a document within Quality Link it is considered a private document and will only be viewable and/or editable by this person. Documents will remain private until they are published, at which point they become a public document and visible by other users of Quality Link (pending user/group permissions). Therefore, publishing a document is the process a user must go through in order for a document to be viewable by other users of Quality Link.

Publishing a Document
Publishing a document in Quality Link is a very common task. It is the process by which a user makes a document public and viewable by other users.

Let’s walk through a typical scenario to better understand the publishing process.

When a document is first created, it is automatically assigned the ‘Draft’ status and is only visible to the user that created the document and to users that are part of the ADMINISTRATORS security group.

Example – New document in ‘Draft’ status before publishing

After an author has finished creating the document content and finished setting the appropriate document properties, they are ready to begin publishing. To help speed up the process by which an author can publish documents, they can choose to select more than one document at a time. This is useful in situations whereby an author needs to publish tens or hundreds of documents simultaneously.
Note: To select items that are next to each other, select the first item, hold down the Shift key, and select the last item. Alternatively, if you would like to select items that are not next to each other, hold down the Ctrl key while selecting each item.

Here are the steps to publish a document:

1. Select the document(s) you would like to publish from the **Info Grid**

2. Select **Publish Document** located on the Documents tab

   ![Publish Document](image)

   This will launch the Publish Documents dialog.

3. Confirm the selected documents and click **Begin Publishing** to start the publishing process

4. Click **Close Form** to close the Publish Document dialog and return to the Document Master view

   ![Publish Document Dialogs](image)
If you now check the Document Master Info Grid you will see that the previously selected ‘Draft’ documents will now have a ‘Published’ status. Assuming other users have appropriate permissions, they will now be able to view your published document(s) as well.

**Common Publishing Scenarios**

The following scenarios represent the most common tasks associated with the ‘Publish Document’ task. These scenarios illustrate the high-level steps that must be executed and where the ‘Publish Document’ task fits into the overall process.

**Scenario 1:**
I want to create a document and then make it available for everyone else in my company to view. What do I need to do?
1. Create a new document
2. Edit the document
3. Publish the document

**Scenario 2:**
I want to create a document, route it for approval, and then make it available for everyone else in my company to view. What do I need to do?
1. Create a new document
2. Edit the document
3. Route the document for approval
4. Publish the document after it has been approved

**Scenario 3:**
I want to make changes to a document that has already been published. What do I need to do?
1. Check out an existing document
2. Edit the document
3. Publish the document

As you can see, every scenario ends with the ‘Publish Document’ task. Although this is the final step required for making your documentation available to other users, you may decide that you need to make modifications after you already published a document (i.e. Scenario 3). The next section in this article will explain the details behind checking out a published document.

**Checking out Documents**

**Overview**
Once you publish a document, you will not be able to make modifications to that document until it is checked out. Checking out a document is the process Quality Link uses to allow you to make modifications to a published document, while keeping the existing version unmodified.

The check out feature will create a copy of a published document and make it available to you for editing. The user checking out the document, and anyone assigned to the ADMINSTRATORS security group, will be able to view and edit this copy of the document. The published version will remain intact and unmodified (this is the version other users and non-administrators will see).
Checking Out a Document

Here is what you need to do in order to check out a document:

1. Select the document(s) you would like to check out from the Info Grid

2. Select **Check Out Document** located on the Documents tab.

![Image of Info Grid and Documents tab with highlighted Check Out Document button]

*Selecting a document for check out*

After you complete the check out process, you should see two copies of the same document. Initially, the only difference will be the status and the version number (see figure below). Quality Link will automatically update the version number when you check out a document.
After checking out a document

Now that we understand how simple this really is, we will tackle some common questions regarding the check out process.

What happens if another user tries to check out a document that you already have checked out?
Quality Link is aware of this and will not allow it. You will see a message displayed that indicates who a document is currently checked out to.

Informational message indicating another user already has a document checked out

What happens when I delete a checked out document?
Deleting a checked out document has the same implications as deleting any other type of document – the delete process will permanently remove the document. For instance, if you check out a document and then later decide you do not want to make any changes because the published version is still accurate, then you can just delete the checked out version of this document.

Where are my checked out documents located?
There are two different answers depending on your perspective. There is both a physical location for your checked out document (i.e. where the actual source file resides on your server) as well as a logical location (i.e. where the document is visible from within Quality Link after it is checked out).

The physical location depends on the root path associated to the \Workspace quality system folder. Both the root System Location and relative Workspace location impact where a document is physically stored. This can be modified by setting options located in your program Options dialog. These settings are only available to Administrators.

![Program Options dialog showing the Workspace location for Checked Out documents](image)

However, the logical location of a checked out document is dependent upon the categories that the published version of the document is assigned to. For example, if the published version of your document is assigned to an ISO category, a Policies category, and a Safety category then you will be able to view and edit the checked out document in each of these categories.

Note: It is important that you do not assign categories to documents that have been checked out as these associations will not be applied when they are re-published. You should always assign categories to the published version of a document.

Tip: To get a quick view of all your checked out documents navigate to the (All Documents) category and group your information grid by ‘Status’. All of your checked out documents will be grouped together. You can optionally filter your information grid and elect to only display checked out documents.
Example – Information Grid grouped by Status to easily see all Checked Out documents

Manage Document Types

Document types help classify and organize your documents. You can group your Information Grid by document type for easy reference to common types of documents (i.e. Policies, Procedures, Job Descriptions, etc…)

To manage your document types:

1. Select the Documents module.
2. Select the Document Master view.
3. Navigate to the ribbon bar and click on Manage Document Types
The following **Manage Document Types** dialog will be displayed and can be used to Add, Delete or Rename a document type.
Document Categories

Overview
Using categories for managing your quality documentation is a common way to not only organize your documentation, but to also secure your documentation. This section will only focus on the organizational aspect of categories; securing documents at the category level will be addressed in a following section.

If you take a look at the categories displayed in the figure below, you will notice there are two categories that have a blue folder. Both of these categories (Unassigned) and (All Documents) are considered system-level categories and cannot be deleted or renamed. The other categories, those with a yellow folder, are considered user-defined categories and can be added, renamed, or deleted.

![Category View showing the system-level category (All Documents) selected](image)

Let’s discuss the two system-level categories as they provide a standard approach for viewing your documents.

The (All Documents) category represents every document in your entire quality system! By selecting (All Documents), your information grid will be populated with a listing of every document you have. As you can imagine, this category may be quite large for some organizations. Nevertheless, it may be useful for administrators to get an overall view of the documentation. You can easily group these documents to see how many documents exist by type, by author, by status, etc… A grouping by status is shown in Figure 16 with the (All Documents) category selected.
The (Unassigned) category, in contrast to the (All Documents) category, represents a listing of every document that has not been assigned to a category. This system-level category is extremely useful in situations where you need to find out which documents have not been assigned to one of your user-defined categories. The (Unassigned) category can help ensure that all of your documentation is organized and secured because it provides a quick and easy reference to documents that have not yet been assigned.

When you think about creating your own user-defined categories and assigning your documents to them you should think about two things: 1) What structure should be put in place to allow for easy navigation and organization of the documents, and 2) Does this structure make sense for how the documents should be secured with respect to viewing and/or editing?

You should create a high-level structure that makes sense for your organization. For example, does it make sense to have a root-level category for Policies, Procedures and Work Instructions? Or, does it make more sense for you to have a root-level category for ISO9001:2000 with Policies, Procedures and Work Instructions existing as sub-categories. Or, you may even decide to implement both types of structures and assign your documents to multiple categories. The choice is yours.

Figure 17 shows some examples of category structures you might decide to employ.

**Creating a Category**

In order to implement a category structure for your documentation, you will need to create each of your user-defined categories in the hierarchical layout that works for your organization. Categories represent a key management component of Quality Link, and can assist with your organizational and security needs across the various modules and views. It is important to note that some of the category structures you create are applied to all of the views within a given module, while others are not. For example, if you were to create a ‘Policies’ category while in the Document Master view, you would see this category appear in all four of the Documents module views: Document Master, Document Archives, Document Distributions, and Document Reviews. However, this ‘Policies’ category would not be displayed in other modules (i.e. Employees, Customers, etc…). You would have to create additional user-defined categories for views within other modules.
In order to create a user-defined category from within your Document Master view you can:

1. Select the Add Category toolbutton located on the Category Toolbar (Figure 18). This will display the New Category Dialog (Figure 19).
2. Enter your new category name and click Create Category. You can optionally press the ‘Enter’ button on your keyboard.

![Figure 18. Category listing with the Add Category toolbutton highlighted](image)

![Figure 19. Add New Category dialog](image)

Note: The Add New Category dialog will remain open after adding a new category. This is to enable the rapid entry of multiple categories!

Below, in figure 20, is a screenshot after adding a new category called ‘My Category’. Did you notice where the category was placed? It was added to the list of top-level nodes. Top-level nodes are also called root nodes, or root level categories. These are the first level of categories in a hierarchical display. So far, every category in this figure is a root level category. This is because we created a new category with the ‘Make this a root level category’ check box selected. You can see this if you refer back to figure 19.
Figure 20. Category listing with ‘My Category’ added to the list

Once you have identified all of the root level categories you need then you can proceed to create sub-categories, also called child nodes. To do this, you just need to select the category that you would like to add sub-categories to and follow the same steps as outlined above for ‘Creating a Category’. By default, when a user-defined category is selected, the ‘Make this a root level category’ check box will not be checked. Quality Link knows that this is a user-defined category and will assume that you want to add a sub-category.

If you make a mistake, don’t worry. The next topics will show you how to rename and delete categories.

Renaming a Category
If you accidentally add a category with the wrong name, or you later decide to modify the names associated with your categories, you can easily rename them to better fit your intentions. Here’s how:

1. Select the category you would like to rename.
2. Select the Rename Category toolbutton located on the Category Toolbar.
3. Enter the new category name and press the ‘Enter’ button on your keyboard. (Figure 21).

Figure 21. Renaming a category

Deleting a Category
Perhaps you want to completely change your document organizational structure, or you have a category you no longer need. In this case, you will find it necessary to delete a category. This can be accomplished with the following actions:

1. Select the category you would like to delete (Figure 22).
2. Select the **Delete Category** toolbutton located on the Category Toolbar. This will display the Delete Confirmation dialog (Figure 23).

3. Confirm your selection and select **Yes**.

![Figure 22. Deleting a category](image)

![Figure 23. Delete Confirmation dialog](image)

It is important to note that deleting a category will **not** delete the documents within that category. It will only remove the association between a document and the category.

Also, similar to other multi-item selection methods, you can select more than one category simultaneously. This is a great time saver if you have major modifications to make and plan on deleting a bunch of categories.

**Note:** To select items that are next to each other, select the first item, hold down the Shift key, and select the last item. Alternatively, if you would like to select items that are not next to each other, hold down the Ctrl key while selecting each item.

There is one more important topic to discuss about deleting categories. If you delete a root level category (that’s a top-level node) you will also automatically delete any sub-categories (that’s any child nodes). You will be prompted with a slightly different confirmation warning you about this action (Figure 24). You cannot reverse the effects should you elect to continue with the deletion process.
Assigning Documents to Categories

Now that we know how to create, rename, and delete categories, perhaps it is time we learn how to assign documents to categories. Assigning documents to categories is a simple process requiring only a few clicks.

To assign documents to categories:

1. Select the document(s) you would like to categorize.
2. Select **Categorize** located on the ribbon control’s Documents tab (Figure 25). This will launch the Categorize Documents dialog.

![Categorize Documents dialog](image)

**Figure 24.** *Delete Confirmation dialog when a category contains sub-categories that are about to be deleted*
3. Check the categories you would like to assign documents to (Figure 26).
4. Select **OK** to save your changes.

**Figure 25. Selecting documents in preparation for categorizing**

**Figure 26. Selecting categories for assigning documents**

Now when users navigate to the Policies category they will only see documents that have been assigned to this category. Figure 27 shows an example of this.

**Figure 27. Viewing the Policies category after assigning documents**
Importing Documents

Overview
Importing documents will likely play a key part of your document management efforts as you begin to implement your quality system, as it is rare that you will be starting out with a completely blank slate. Quality Link provides two different methods for helping manage existing documentation. You can ‘link’ an existing document, or you can ‘import’ an existing document. You will want to consider the differences in these methods as you begin to build your quality system.

Linked Documents vs. Imported Documents
Linked documents, unlike imported documents, are maintained external to Quality Link. Linking a document will instruct Quality Link to create a new record with a pointer (a.k.a. a link) to the existing document. Whereas importing a document will make a copy of the existing document and place it under the control of Quality Link.

Linked documents have limited functionality within Quality Link and cannot use templates, be checked out, or even published. Only importing a document will make the complete set of document management features available to you. The reason for this is simple. Since a linked document is external, it will likely be accessed by other applications and/or programs; it wouldn’t make sense for Quality Link to apply its management features when other solutions may be depending on their own management features. This also helps ensure external documents are always accessible and in a consistent state for other applications which require access.

Under most circumstances, you will want to import your existing documentation; however, there are certain situations that may be better addressed by the linking option. One example is when the file is an executable (i.e. .exe). You aren’t really going to manage an executable file like you would a document, but you may want to include a reference to this application within in your Documents module. This is a great example of when ‘linking’ a file may be better than ‘importing’ a file.

Note: Deleting a ‘linked’ document from Quality Link will only remove the record and meta-data associated with this file; the actual source file will _not_ be deleted.

Note: Linked documents are the only documents in Quality Link that will have an ‘External’ status.

Importing a Document
You can import a document by following these simple steps:

1. Select **Import Documents** located on the ribbon control’s Documents tab. This will display the Document Import Wizard (Figure 28)
2. Select the ‘Import the source document(s)’ option to import documents into your quality system. Click Next. This will display step 2 of the import process (Figure 29).

3. Select the Browse button and select the files you would like to import.

4. Select the Quality Link template from the dropdown. The selected template will be applied to each of the files you attempt to import.

5. Modify the Document ID, Title, Revision ID, and Author prior to importing the document. You can modify these values directly in the grid control. See Figure 30 for an example of a template selection and modified properties.
Figure 30. Document Import Wizard dialog – Step 2 (after files have been selected)

6. Click Next to proceed.
7. Choose whether or not the imported documents should be assigned to one or more categories immediately after being imported (Figure 31). If you do not assign categories now, you can always do so after the import process.

Figure 31. Document Import Wizard dialog – Step 3 (Assigning categories to imported documents)

8. Click Next to proceed.
9. Select Finish to confirm your selections and begin the import process (Figure 32).
Figure 32. Document Import Wizard dialog – Document Import Summary

Note: All documents will be imported with a ‘Draft’ status. You will need to publish the documents before other users of Quality Link will be able to see them.

Routing Documents

Route a Document for Approval

If you need to have documents approved by one or more users prior to publishing, you can utilize the ‘Route for Approval’ task.

1. Select the Document Master view available from within the Documents module.

2. Select the document you would like to route for approval from the Information Grid.
Note: Documents must be in a ‘Checked Out’ or ‘Draft’ status in order to be routed for approval. You will not be able to route a document for approval if it is already published.

3. Select **Route for Approval** located on the Documents tab.

   ![Route for Approval](image)

   This will display the **Document Routing and Approval Wizard**.

4. Select **Next** to bypass the Welcome screen and select your **Routing and Approval** options.

   ![Routing and Approval](image)

   If you choose to ‘Automatically approve the document’, Quality Link will populate the ‘Approver’ information with your current user ID and you will not have to take any further action to have this document approved (i.e. you will not receive an Approval event – the document will just be automatically approved).

   If, however, you would like to generate approval events for other users, you can elect to select the ‘Route the document(s) for approval’ option and select the members you would like to route the document to.

5. Select **Next** to continue. Select the **Auto-Publishing** option.
The auto-publish option will determine whether or not the document is published immediately after the last person approves the document. If ‘Yes’ is selected, then no further action is needed and the document will be automatically published and available to other users for viewing. Otherwise, the document needs to be manually published after it is approved.

Note: If any user rejects the document it will not be automatically published. You will have to modify the document, re-route the document, and request the approvals again.

6. Select **Next** to continue. Click **Finish** after confirming your choices and to begin the routing and approval process.

**Route a Document for Acknowledgement**

If you need to have the users of Quality Link acknowledge modifications to a document (i.e. perhaps a procedure change) you can optionally use the document acknowledgement routing feature. This task allows you
to send an event notification to one or more users asking them to read and acknowledge the new and/or modified documents.

To use the document acknowledgement routing feature:

1. Select the **Document Master** view available from within the **Documents** module.

![Document Master view](image)

2. Select the document you would like to route for acknowledgement from the **Information Grid**.

![Information Grid](image)

Note: Documents must have a ‘Published’ status before they can be routed for acknowledgement.

3. Select **Route for Acknowledgement** located on the Documents tab.

![Route for Acknowledgement](image)

This will display the **Document Routing and Acknowledgement Wizard**.

![Document Routing and Acknowledgement Wizard](image)

4. Select **Next** to bypass the Welcome screen and select your **Routing and Acknowledgement** options.
5. Choose your routing members by selecting the **Route To** button.

6. Select **Next** to continue. This will display the Routing and Acknowledgement Summary dialog.

7. Select **Finish** to initiate the routing and acknowledgement process.
Show Document Approvals

To view a complete list of who approved a document, and when the document was approved, you can execute the ‘Show Document Approvals’ task. This is a useful feature both during and after a document has been routed for approval.

1. Select the **Document Master** view available from within the **Documents** module.

2. Select the document you would like to show approvals for from the **Information Grid**.

3. Select **Show Approvals** located on the Documents tab.

The following **Document Approvals** dialog will be displayed.

This is the list of users that have either approved or rejected the document as part of a document route. Select the **View Routed Document** button to see the changes and/or comments made to the document. If the document has been rejected and the changes are acceptable then select the **Replace Original Document** button to apply these changes to the original document. You can optionally edit the original document (i.e. the document that was routed to the users) by selecting **Edit Original Document**. You can then elect to re-route the document, if necessary, by selecting **Re-Route Document**.
Show Document Acknowledgements

To view a complete list of who has acknowledged a document, and when this action took place, you can execute the ‘Show Document Acknowledgements’ task. This feature provides an easy way to ensure every user acknowledges new documents, as well as revisions to existing documents.

1. Select the **Document Master** view available from within the **Documents** module.

2. Select the document you would like to show acknowledgements for from the **Information Grid**.

3. Select **Show Acknowledgements** located on the Documents tab.

The following **Document Acknowledgement** dialog will be displayed.

This is the list of users that have received a routing acknowledgement. You can verify whether or not they have ‘acknowledged’ this document by referencing the value recorded in the Status column. Items listed as ‘Not Started’ indicate the user has not yet taken action on this request.
Document Archives

Edit Document Archive

By default, Quality Link automatically creates an archive of every document you publish. You can view and/or edit the archived document properties by following these steps:

1. Select the Document Archives view available from within the Documents module.

2. Select the document you would like to view/edit the properties for from the Information Grid.

3. Select Edit Archive located on the Documents tab.

4. The following Archive Properties window will open.
Use this dialog to view the archive properties or edit the Notes associated with this archive by selecting the Notes section. You can also Print or Preview the archived document from this dialog.

Delete Document Archive

To delete an archived document:

1. Select the Document Archives view available from within the Documents module.

2. Select the document you would like to view/edit the properties for from the Information Grid.

3. Select Delete Archive located on the Documents tab.

4. The following confirmation dialog will be displayed.

5. Select Yes to delete the selected document.
Print or Preview an Archived Document

1. Select the Document Archives view available from within the Documents module.

2. Select the document you would like to print or preview from the Information Grid.

3. Select Print Archive or Preview Archive located on the Documents tab.

    Note: If the selected document(s) are using a Quality Link template then they will open with Microsoft Word and the requested action (print or preview) will be performed automatically. However, if the document(s) are not using a Quality Link template, they will open with the program associated to this documents file extension (i.e. *.xls will open Microsoft Excel).

Compare Archived Documents

If you are ever in need of comparing two documents, perhaps the currently published version and an older archived version, you can use the Compare Archive feature to accomplish this.

To compare archived documents:

1. Select the Document Archives view available from within the Documents module.
2. Select the two documents you would like to compare from the **Information Grid**.

![Document Archives: 1 - Policies](image)

<table>
<thead>
<tr>
<th>Docu</th>
<th>Rev</th>
<th>Version</th>
<th>Title (Archived)</th>
<th>Status (Arch)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0</td>
<td>-</td>
<td>1</td>
<td>MANAGEMENT SYSTEM</td>
<td>Archived</td>
</tr>
<tr>
<td>5.0</td>
<td>-</td>
<td>1</td>
<td>MANAGEMENT RESPONSIBILITY</td>
<td>Archived</td>
</tr>
<tr>
<td>6.0</td>
<td>-</td>
<td>1</td>
<td>RESOURCE MANAGEMENT</td>
<td>Archived</td>
</tr>
<tr>
<td>7.2</td>
<td>-</td>
<td>1</td>
<td>CUSTOMER RELATED PROCESSES</td>
<td>Archived</td>
</tr>
<tr>
<td>7.3</td>
<td>-</td>
<td>1</td>
<td>DESIGN AND/OR DEVELOPMENT</td>
<td>Archived</td>
</tr>
<tr>
<td>7.4</td>
<td>-</td>
<td>1</td>
<td>PURCHASING</td>
<td>Archived</td>
</tr>
<tr>
<td>7.5</td>
<td>-</td>
<td>1</td>
<td>MANUFACTURING OPERATIONS</td>
<td>Archived</td>
</tr>
<tr>
<td>7.6</td>
<td>-</td>
<td>1</td>
<td>CONTROL OF MEASURING AND MONITORING DEVICES</td>
<td>Archived</td>
</tr>
<tr>
<td>8.0</td>
<td>-</td>
<td>1</td>
<td>MEASUREMENT, ANALYSIS AND IMPROVEMENT</td>
<td>Archived</td>
</tr>
</tbody>
</table>

3. Select **Compare Archive** located on the Documents tab.

![Compare Archive](image)

Note: The ‘Compare Archive’ feature of Quality Link uses the document compare features within Microsoft Word to facilitate this task. If you are not using `.doc` or `.docx` formats then this feature may not be available.

Additionally, depending on your version of Microsoft Word and the default settings used to compare documents, you may see your document differences displayed in a balloon-style format next to your text, or you may see your document differences displayed in-line.

**Restore Archive**

You can easily restore a document archive if you determine that a previous version is more relevant than a current version of a document.

To restore a document archive:

1. Select the **Document Archives** view available from within the **Documents** module.
2. Select the document you would like to restore from the **Information Grid**.

![Information Grid](image)

<table>
<thead>
<tr>
<th>Document</th>
<th>Revision</th>
<th>Version</th>
<th>Title (Archived)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0</td>
<td>-</td>
<td>1</td>
<td>MANAGEMENT SYSTEM</td>
</tr>
<tr>
<td>5.0</td>
<td>-</td>
<td>1</td>
<td>MANAGEMENT RESPONSIBILITY</td>
</tr>
<tr>
<td>6.0</td>
<td>-</td>
<td>1</td>
<td>RESOURCE MANAGEMENT</td>
</tr>
<tr>
<td>7.2</td>
<td>-</td>
<td>1</td>
<td>CUSTOMER RELATED PROCESSES</td>
</tr>
<tr>
<td>7.3</td>
<td>-</td>
<td>1</td>
<td>DESIGN AND/OR DEVELOPMENT</td>
</tr>
<tr>
<td>7.4</td>
<td>-</td>
<td>1</td>
<td>PURCHASING</td>
</tr>
<tr>
<td>7.5</td>
<td></td>
<td>1</td>
<td>MANUFACTURING OPERATIONS</td>
</tr>
<tr>
<td>7.6</td>
<td></td>
<td>1</td>
<td>CONTROL OF MEASURING AND MONITORING DEVICES</td>
</tr>
<tr>
<td>8.0</td>
<td>-</td>
<td>1</td>
<td>MEASUREMENT, ANALYSIS AND IMPROVEMENT</td>
</tr>
<tr>
<td>8.0</td>
<td>A</td>
<td>2</td>
<td>MEASUREMENT, ANALYSIS AND IMPROVEMENT</td>
</tr>
</tbody>
</table>

3. Select **Restore Archive** located on the Documents tab.

![Restore Archive](image)

After a document has been successfully restored, it will appear in your Document Master view as a ‘Checked Out’ document.

---

**Document Distributions**

**Create a New Document Distribution (Controlled Copy)**

Creating and maintaining a list of your distributed documents (i.e. controlled copies) is an important part of managing your quality system. It is important that you know exactly which documents have been distributed, the location of the distribution, as well as the unique id (i.e. control number) that pertains to each printed copy of a controlled document.

1. Select the **Document Distributions** view available from within the **Documents** module.

![Document Distributions](image)

- Document Master
- Document Archives
- Document Distributions
- Document Reviews

2. Select **New Distribution (Wizard)** located on the Documents tab.
This will display the **Document Distribution Wizard**.

3. Click the **Select Documents** button to display the list of categories from which you can select documents to be used for this distribution.

4. Select the document(s) to distribute and click **OK**. Confirm your selection and click **Next**.
5. Enter the Control ID for the document(s) to be distributed, then click **Next**.

6. Select a **Location** indicating where this document will reside, and optionally a **Manual** if this document will be included in a binder with other documents.

You can use the **Manage Locations** button and the **Manage Manuals** button to Add, Delete or Rename existing items to make them available via the dropdowns in this dialog.

7. Click **Next** to continue.
8. Review your choices and click **Finish** when you are ready to create the distribution records.

9. Select **Close Form** after reviewing the results of this process.

**Edit Document Distribution**

After you create your initial distribution records, you may find it necessary to modify some of the details. If this is the case, you can edit the properties associated with your distribution records.

To modify the properties of a distribution record:

1. Select the **Document Distributions** view available from within the **Documents** module.
2. Select the distribution you would like to edit from the **Information Grid**

<table>
<thead>
<tr>
<th>Docu</th>
<th>Rev</th>
<th>Version</th>
<th>Contrib</th>
<th>Title</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0</td>
<td>-</td>
<td>1</td>
<td>2</td>
<td>MANAGEMENT SYSTEM</td>
<td>Distribution Location 1</td>
</tr>
<tr>
<td>5.0</td>
<td>-</td>
<td>1</td>
<td>2</td>
<td>MANAGEMENT RESPONSIBILITY</td>
<td>Distribution Location 1</td>
</tr>
<tr>
<td>6.0</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>RESOURCE MANAGEMENT</td>
<td>Distribution Location 1</td>
</tr>
<tr>
<td>7.3</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>DESIGN AND/OR DEVELOPMENT</td>
<td>Engineering Department</td>
</tr>
<tr>
<td>7.4</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>PURCHASING</td>
<td>Purchasing Department</td>
</tr>
</tbody>
</table>

3. Select **Edit Distribution** located on the Documents tab.

4. The following **Distribution Properties** window will open.

5. Update the properties of the selected distributed document. Use the **Notes** section and/or the **Custom Fields** section to input additional data. Select the **Save & Close** button when finished.

**Delete Document Distribution**
Although Quality Link provides a reference in the properties dialog to indicate when a document has been returned, you might still find it necessary to delete your distribution records. If that is the case, then you can use the following process to delete your document distribution records.

To delete a document distribution record:

1. Select the **Document Distributions** view available from within the **Documents** module.

2. Select the distribution you would like to delete from the **Information Grid**

3. Select **Edit Distribution** located on the Documents tab.

4. The following confirmation dialog will be displayed. Select **Yes** to delete the distribution.

**Print or Preview a Distributed Document (Controlled Copy)**

1. Select the distribution you would like to print or Preview from the **Information Grid**
2. Select **Print Document (Controlled Copy)** or **Preview Document (Controlled Copy)** located on the Documents tab.

**Manage Distribution Locations**

Distribution locations are used to indicate the physical location of where a document resides. Although Quality Link can be used to store your electronic reference to the document, it is your responsibility to deliver the document to its physical location.

To manage distribution locations:

1. Select the **Document Distributions** view available from within the **Documents** module.

2. Select **Manage Distribution Locations** located on the Documents tab.

3. The following **Manage Distribution Locations** window will open.
4. Select Add, Delete, or Rename to manage your distribution locations.

5. Select Close when finished.

**Manage Quality Manuals**

Quality Manuals represent a logical grouping of specific distributed documents. These documents are typically bound in a folder and labeled as a quality manual. When creating document distributions you will have the option of indicating whether or not a document should be associated to a quality manual.

To manage your quality manuals:

1. Select the **Document Distributions** view available from within the **Documents** module.

2. Select **Manage Quality Manuals** located on the Documents tab.

3. The following **Manage Quality Manuals** window will open.
4. Select **Add**, **Delete**, or **Rename** to manage your quality manuals.

5. Select **Close** when finished.

### Synchronize Document Distributions

The ability to synchronize distributions offers you a great way to keep your system current! Here’s an example of why you might find this feature useful. Let’s say you publish and distribute Revision A of a specific document and a few months later you decide to check out the document, make some changes, and re-publish for your online users. How will you know that you should also update your distribution record, re-print the distributed document, and place in the correct physical location?

The Document Distributions view not only provides you with visual clues (i.e. special icons and red text) indicating documents that are out of sync, but it also provides the ability to select many documents at once and automatically update (i.e. synchronize) your distributed document references with that of the currently published document!

Here’s how to synchronize distributions that don’t match your currently published document:

1. Select the **Document Distributions** view available from within the **Documents** module.

2. Select the distribution record(s) you would like to synchronize from the **Information Grid**
Note: Quality Link uses the synchronize icon [ ] to indicate a distributed document is out of sync with a published document. Once a document is synchronized (i.e. the Revision ID and Version ID are updated to match that of the published document), a printer icon [ ] appears to indicate the document still needs to be printed and physically delivered to the location specified. After the document is printed, an icon representing the type of file, based on its file extension, will be displayed.


4. The following confirmation dialog will be displayed. Select Yes to synchronize the selected document(s).

The document will be synchronized and the icon on the Information Grid will be changed to the printer icon.

<table>
<thead>
<tr>
<th>Docu</th>
<th>Revs</th>
<th>Version</th>
<th>Control ID</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1</td>
<td>1</td>
<td>2</td>
<td>2A</td>
<td>CONTENTS</td>
</tr>
<tr>
<td>0.2</td>
<td>1</td>
<td>1</td>
<td>2A</td>
<td>ORGANIZATION LIST</td>
</tr>
<tr>
<td>0.3</td>
<td>1</td>
<td>1</td>
<td>2A</td>
<td>CIRCULATION LIST</td>
</tr>
<tr>
<td>0.4</td>
<td>1</td>
<td>1</td>
<td>2A</td>
<td>ORGANIZATION BACKGROUND</td>
</tr>
<tr>
<td>0.5</td>
<td>1</td>
<td>1</td>
<td>2A</td>
<td>SCOPE</td>
</tr>
<tr>
<td>4.0</td>
<td>2</td>
<td>2</td>
<td></td>
<td>MANAGEMENT SYSTEM</td>
</tr>
<tr>
<td>5.0</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>MANAGEMENT RESPONSIBILITY</td>
</tr>
<tr>
<td>6.0</td>
<td>1</td>
<td>1</td>
<td></td>
<td>RESOURCE MANAGEMENT</td>
</tr>
<tr>
<td>7.3</td>
<td>1</td>
<td>1</td>
<td></td>
<td>DESIGN AND/OR DEVELOPMENT</td>
</tr>
<tr>
<td>Document ID</td>
<td>Revision ID</td>
<td>Version</td>
<td>Control ID</td>
<td>Title</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>---------</td>
<td>------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>0.1</td>
<td>-</td>
<td>1</td>
<td>2A</td>
<td>CONTENTS</td>
</tr>
<tr>
<td>0.2</td>
<td>-</td>
<td>1</td>
<td>2A</td>
<td>ORGANIZATION LIST</td>
</tr>
<tr>
<td>0.3</td>
<td>-</td>
<td>1</td>
<td>2A</td>
<td>CIRCULATION LIST</td>
</tr>
<tr>
<td>0.4</td>
<td>-</td>
<td>1</td>
<td>2A</td>
<td>ORGANIZATION BACKGROUND</td>
</tr>
<tr>
<td>0.5</td>
<td>-</td>
<td>1</td>
<td>2A</td>
<td>SCOPE</td>
</tr>
<tr>
<td>4.0</td>
<td>-</td>
<td>2</td>
<td>2</td>
<td>MANAGEMENT SYSTEM</td>
</tr>
<tr>
<td>5.0</td>
<td>-</td>
<td>2</td>
<td>2</td>
<td>MANAGEMENT RESPONSIBILITY</td>
</tr>
<tr>
<td>6.0</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>RESOURCE MANAGEMENT</td>
</tr>
<tr>
<td>7.3</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>DESIGN AND/OR DEVELOPMENT</td>
</tr>
</tbody>
</table>
Document Reviews

Schedule Document for Review

If you are like most organizations, you will have a need to periodically review your existing documentation. Quality Link comes equipped with a feature to assist you with this task. The ‘Schedule for Review’ task allows you to set a recurrence schedule for one or more documents that you would like to review on a regular basis.

The scheduling of a document review is most often associated with corporate policies and procedures; however, it can be applied to any document contained within your quality system.

To schedule a document for review:

1. Select the **Document Master** view available from within the **Documents** module.

2. Select the document you would like to schedule for a review from the **Information Grid**.

   ![Document Master: ISO 9001:2000 MANUAL](image)

   Note: Documents must have a status of ‘Published’ or ‘External’ before they can be scheduled for a review. You will not be able to schedule documents that are in a ‘Draft’ or ‘Checked Out’ status.

3. Select **Schedule for Review** located on the Documents tab.

   ![Schedule for Review](image)

   Note: You will be able to schedule the frequency of a review on the Document Review properties dialog.
4. The following **New Document Review** properties window will open.

![New Document Review properties window](image.png)

If you are scheduling a new review then you can set the appropriate recurrence schedule (i.e. frequency) of the document review by clicking ‘Set Recurrence’. You should also ensure the Subject is correct, as well as the ‘Due Date’ and ‘Assigned To’ fields. You can use the ‘Assigned To’ field to delegate the review to another user, or you can leave it at the default setting which is your user id.

If this is not a new review, and you are instead actively reviewing this document, you can click ‘Preview Document’ to view it. You should ensure the document is current and still relevant to your organization. If you find this document is out of date and in need of modification, you can follow the process for checking out a document, which will allow you to make any necessary changes.

5. Select **Save & Close** when finished.

**Edit Document Review Properties**

1. Select the **Document Reviews** view available from within the **Documents** module.

2. Select the document review you would like to edit from the **Information Grid**.
3. Select **Edit Properties** located on the Documents tab.

4. The following **Scheduled Document Review** properties window will open.

5. Update the document review properties and click **Save & Close** when finished.

**Delete Document Review**

1. Select the **Document Reviews** view available from within the **Documents** module.
2. Select the document review you would like to delete from the **Information Grid**.

![Image of Document Reviews: (All Documents)](image)


![Image of Edit Properties and Delete Document Review options](image)

4. The following confirmation dialog will be displayed. Select **Yes** to delete the record.

![Image of Delete Document Review dialog](image)
Mark a Document Review as Complete

If you have completed a document review you can edit the document review properties and change the status to 'Completed', or you can optionally use the 'Mark as Complete' task.

To automatically mark an event as complete, do the following:

1. Select the **Document Reviews** view available from within the **Documents** module.

![Views](image)

- Select the **Document Master**
- **Document Archives**
- **Document Distributions**
- **Document Reviews**

2. Select the document review you would like to mark as complete from the **Information Grid**.

![Document Reviews: (All Documents)](image)

3. Select **Mark As Complete** located on the Documents tab.

![Mark As Complete](image)

The following confirmation dialog will be displayed.

![Mark As Complete](image)

4. Select **Yes** to mark the selected document review(s) as complete.
Set Document Review Recurrence

You can optionally establish a frequency for how often you would like to review a given document. To set a recurrence, perform the following:

1. Select the **Document Reviews** view available from within the **Documents** module.

   ![Views](image)
   - Document Master
   - Document Archives
   - Document Distributions
   - Document Reviews

2. Select the document review you would like to establish a recurrence for from the **Information Grid**.

   ![Document Reviews: (All Documents)](image)
   - **Due Date**
   - **Status**
   - **Priority**
   - **Subject**
   - *03/08/2008* Not Started Normal Scheduled Document Review - 7.1 (-) PRODUCT REALIZATION
   - *12/06/2008* Not Started Normal Scheduled Document Review - 4.0 (-) MANAGEMENT SYSTEM

3. Select **Set Recurrence** located on the Documents tab.

   ![Set Recurrence](image)

4. The following **Event Recurrence** window will open.

   ![Event Recurrence](image)

   - **Recurrence Pattern**
     - None
     - Daily
     - Weekly
     - Monthly
     - Yearly
   - **Range of Recurrence**
     - Start Date: 12/06/2008
     - End by: 10/30/2008
     - No end date

5. Select the desired Recurrence Pattern and Range then click **OK**.
Creating and Managing Document Templates

Overview

Using document templates within Quality Link provides a simple way to standardize the look and feel of your quality documentation. You will be able to not only use pre-defined fields which let you correlate your document properties within Quality Link to your actual document, but you can also determine the formatting, as well as common headers and footers, that will be applied to each document using a specified template.

Quality Link ships with seven pre-defined document templates. These templates are based on the Microsoft Word®.dot format and can help you get started both quickly and easily as you start to build out your quality system. However, there may come a time when you must modify an existing template, or even create a new template to meet the needs of your organization. This section will show you how to apply existing templates, modify the default template settings, modify existing templates, and even how to create new templates.

Apply an Existing Template

When you apply a template, Quality Link builds your document using a predefined format based on the template you selected. Applying a template to a document is a simple task and can be accomplished quickly.

To apply an existing template:

1. Navigate to the **Documents** module.
2. Navigate to the **Document Master** view.
3. Select the document you would like to apply a template to from the information grid.
4. Select **Edit Properties** located on the ribbon control’s Documents tab.
5. Select the template you would like to apply from the **Template** dropdown (Figure 40).

![Figure 40. Selecting a template for the current document](image)

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Note: You can only modify the template for documents that have a ‘Draft’ or ‘Checked Out’ status. You cannot modify the template applied to a published document. All properties for published documents are read-only. You can, however, check out a published document, modify the template, and then re-publish the document if you would like to apply a different template.

That’s all there is to it. However, it is important to note that in order to have a template applied and your document updated to reflect the template formatting; you must edit the document source before previewing and/or printing the document.

Modify Default Template Settings

In our previous example we saw that the template selected was titled StandardTemplate_v6.dot. By default, this is the template that is applied when you create a new document. You can always select a new template (as indicated in the previous section), or you can modify the default template so new documents will be created with your template of choice.

Let’s analyze a document that was created using the default template (Figure 41)

![Figure 41. A document based on the default template](image)

As you can see, we have used the default StandardTemplate_v6.dot template, which includes the box formatting shown in the document header, as well as the Document Title, Document ID, Revision ID, and a few other standard fields. Also notice the text, "* Controlled Unless Printed *", which is displayed in the header. The text for this field comes from a global system setting within Quality Link called “Template Text”.

You can follow these steps to change the default template used for your documents as well as modify the “Template Text” displayed in your document header:
1. Navigate to the Administration module.
2. Select System Options located on the ribbon control’s Administration tab (Figure 42).

![Figure 42. Selecting System Options from the Administration module](image)

3. Select the Templates tab located on the Quality System Options dialog (Figure 43).
4. Select the Browse (i.e. ellipsis) button for the ‘Default Template for Viewing Online Documents’ section and choose a new template (.dot) file.
5. Click OK when finished.

![Figure 43. The Templates tab on the Quality System Options dialog](image)
The Templates tab consists of settings that determine how your online documents, distributed documents, and archived documents are viewed. Below are descriptions of these settings and how you may want to use them for your quality system.

**Template File** – This field is available in three different sections on the Templates tab in this dialog – when viewing online documents, when viewing distributed documents, and when viewing archived documents. In every case, this field represents the actual template source file (i.e. the .dot file) that should reside in your \Templates quality system folder. It is not uncommon to have the same template applied to all three sections as this will maintain consistency when viewing and/or printing your documentation; however, you have the option to select different templates based on the current state of the document (i.e. Online viewing, Distributed viewing, and Archive viewing). The template file you select for viewing online documents will appear as the default template selection when creating new documents.

**Template Text** – The Template Text is a global field and the information entered here can be applied to any document (as long as the template used contains the corresponding field: QL_TemplateText). Unlike document properties, which are unique for each document, the Template Text field can be used to represent a consistent phrase for every document using a template in which this field is used. It is quite common for this field to be used in your template headers in a fashion that represents the control status of the document (i.e. “Uncontrolled Copy”, “Controlled Unless Printed”, “Online Controlled Copy”, “Controlled Copy”, “Archived Copy”, or any other phrase that fits the need of your company).

**Creating a New Template**

Once you are familiar with Quality Link and begin to build your quality system, you may find that the out-of-the-box templates do not meet one hundred percent of your needs. If that is the case, then you have the option of creating your own templates. This is a common scenario and one you will likely encounter as you customize your quality system.

When creating a new template it is *always recommended* that you start by copying an existing template. The reason for this is quite simple; the out-of-the-box templates each contain a set of pre-built custom fields that are ready to integrate with Quality Link. These fields are called DocProperty fields and are an essential part of integrating a Microsoft Word® document with Quality Link.

Here are the steps you should follow to create a new template:

1. Create a copy of an existing template.

    **Note:** This can be accomplished many different ways. The most straightforward approach is to use Windows Explorer. Navigate to your ...\Templates folder and use the standard Windows copy and paste functionality.

    **Tip:** You can use the same Windows copy and paste functionality from the within the file selection dialogs available within Quality Link; therefore, you can copy the file to be used as your new template when selecting the browse button as described in Step 4 of the previous topic (if you use this approach for creating a copy of your template you can skip this step).
2. Navigate to the **Administration** module.
3. Select **System Options** located on the ribbon control’s Administration tab (Figure 42).
4. Select the **Templates** tab located on the Quality System Options dialog (Figure 43).
5. Select the **Browse** (i.e. ellipsis) button for the ‘Default Template for Viewing Online Documents’ section and choose your new template (.dot) file (Figure 44). This should be the file you copied in step 1.

![Select a Template](image)

**Figure 44. Selecting a template file**

6. Select the **Edit Template** button for the ‘Default Template for Viewing Online Documents’ section.

This action will open Microsoft Word® with the template file you selected and prepare it for editing (Figure 45). Since this is a copy of the original template, we can make any changes we want with the assurance we can revert back to the original template if we make any mistakes.

![Preparing to edit a new template](image)

**Figure 45. Preparing to edit a new template**
7. **Format** your template as appropriate.

Formatting a template assumes you are familiar with the document editing and formatting capabilities of Microsoft Word. The next step will help you update Quality Link specific fields.

8. **Add, Remove, or Delete** any Quality Link template fields.

Inserting any of the Microsoft Word DocProperty fields which begin with a `QL_` into your template will provide the required information in order for Quality Link to dynamically update the fields when any of the document property values are modified within Quality Link and the document is subsequently edited and/or previewed. This will automatically keep your documentation in sync with the document properties as defined in Quality Link.

Table 2 shows the available DocProperty fields that you can leverage within your own custom templates.

**Table 2. DocProperty fields available for customizing templates**

<table>
<thead>
<tr>
<th>DocProperty Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>QL_Approvers</td>
</tr>
<tr>
<td>QL_ApproversAndApprovalDate</td>
</tr>
<tr>
<td>QL_Authors</td>
</tr>
<tr>
<td>QL_CompanyName</td>
</tr>
<tr>
<td>QL_DistributionCopyNumber</td>
</tr>
<tr>
<td>QL_DocumentID</td>
</tr>
<tr>
<td>QL_DocumentType</td>
</tr>
<tr>
<td>QL_EffectiveDate</td>
</tr>
<tr>
<td>QL_Notes</td>
</tr>
<tr>
<td>QL_PublishedBy</td>
</tr>
<tr>
<td>QL_PublishedDate</td>
</tr>
<tr>
<td>QL_RelatedDocuments</td>
</tr>
<tr>
<td>QL_Responsibility</td>
</tr>
<tr>
<td>QL_RevisionDate</td>
</tr>
<tr>
<td>QL_RevisionID</td>
</tr>
<tr>
<td>QL_Status</td>
</tr>
<tr>
<td>QL_TemplateText</td>
</tr>
<tr>
<td>QL_Title</td>
</tr>
<tr>
<td>QL_Version</td>
</tr>
</tbody>
</table>

You can also include any of the custom document fields as defined in Quality Link (i.e. QL_Custom1 to QL_Custom20).
To insert one or more of these property fields into your template you will need to navigate your version of Microsoft Word and execute the appropriate commands. The following steps show how to accomplish this using Microsoft Word 2007.

- Select the **Insert** tab
- Select the **Quick Parts** button
- Select the **Field**… dropdown option (Figure 46)

![Microsoft Word Quick Parts](image)

**Figure 46. Preparing to insert Microsoft Word® document fields**

Selecting the Field menu option will display the Microsoft Word Field dialog whereby you can select the **QL_** field properties you would like to insert into your custom template (Figure 47).

![Microsoft Word Field](image)

**Figure 47. QL_ property fields available in the Microsoft Word® Field dialog**

- Select the **DocProperty** item from the Field Names list on the left-hand side of the dialog (Figure 47).
- Select the **QL_** property you would like to insert into your template.
Select **OK** to insert the selected property.

Note: Once the property has been inserted into your template you may need to enable/disable the viewing of fields within your document to see the actual DocProperty name instead of the value for this field. Instructions for doing this are found in the Microsoft Word help and are usually under the following topic ‘Show field codes instead of their values’, depending on your version of Microsoft Word.

9. **Save** your template changes.

Congratulations! You have just completed the necessary steps for learning how to create a custom template.

If you would like to analyze a sample template to learn more about how this works you should take a look at the **Sample_v6.dot** template located in the **...\Templates** folder. This is a sample template that ships with Quality Link and can be used to help you further understand DocProperty fields and how Quality Link integrates with Microsoft Word.

**Securing Documents**

**Overview**
Ensuring that your documents are available to the right users, at the right time, is an important part of maintaining a quality system. Quality Link provides various options to help ensure that your documentation is secure. However, due to the many facets of security and the virtually unlimited amounts of information that can be written about it, this topic will limit the focus to one key aspect within Quality Link – managing security at the category level (Figure 48).

![Managing security for document categories](image)

**Figure 48. Managing security for document categories**
Enabling security at the category level lets you determine the privileges users have when accessing the documents contained within a particular category. Security at this level is established by assigning users to one of the following built-in roles:

- **Reader role**
  - Users assigned to this role will be able to view the documents contained within the category. Users will not be able to do anything that affects the value of the properties or the content; therefore, they will not be able to edit, delete, or otherwise modify any aspect of the document.

- **Contributor role**
  - Users assigned to this role will be able to view and modify the documents contained within the category. Contributor rights grant users create, edit, and delete privileges.

**Maintaining Category Level Security**
Maintaining document security at the category level provides a great way to set permissions in a way that is both useful and manageable. The steps below will show you how to add security to the policies category.

To set security on the ‘1 - Policies’ document category:

1. Select the ‘1 – Policies’ category.
2. Select the **Secure Category** toolbutton located on the Category Toolbar (Figure 49). This will display the Category Security dialog for the selected category (Figure 50).

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**Figure 49. Secure Category toolbutton selection**

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To set the security for the currently selected category, use the 'Users' and 'Groups' button located beneath the Contributor and Reader roles.
Figure 50. *Category Security dialog – Default security settings*

On this dialog you will see the default security settings which were applied when you first created this category. Quality Link automatically adds the ‘EVERYONE_READERS’ security group to the Reader Role and the ‘EVERYONE_CONTRIBUTORS’ security group to the Contributor Role.

Note: It is important you understand that new users are also automatically added to these two security groups (i.e. EVERYONE_READERS and EVERYONE_CONTRIBUTORS). This creates a scenario that allows you to add both new users and new categories in a fashion that lets the users add, edit, and delete documents from any category. You will need to modify the user security settings (in the Administration module) or modify the category security (as described in this section) to prevent access or limit document access to view only.

Let’s modify the Contributor role so only our Policy Approvers have access to create, edit, and delete documents.

3. Select the **Groups** button from the Contributor Role section. This will display the User Group Selection dialog which can be used to select the groups you would like to add as contributors (Figure 51).

4. **Check** the ‘Policy Approvers’ check box and click **OK**. This will add the ‘Policy Approvers’ group to the contributor role section (Figure 52).
5. Select the EVERYONE_CONTRIBUTORS item and click the Delete [X] button.
6. Select OK to save your changes (Figure 53).

That’s all there is to it. You just modified the category security which will affect every document assigned to the ‘1 – Policies’ category. Users assigned to the EVERYONE_READERS role can only view documents, while users assigned to the ‘Policy Approvers’ group can add, change, and delete documents as they pertain to this category.

Note: Users that are not assigned to either the 'Reader' role or the 'Contributor' role will not be able to view any document within the respective category. The category for which they do not have Reader or Contributor role membership will not even be displayed in the view.

It is a recommended best practice to assign users to security groups, and then assign the security groups to either the Reader role or the Contributor role. Alternatively, you can choose to manage users on an individual basis for these roles, but this approach generally becomes more cumbersome to manage long-term as opposed to managing the security by group membership.

Note: It is also important to ensure that users have the correct security setting for the Documents module as well as the views available within this module. Otherwise, it will not matter what types of security is applied at the category level. If users cannot access the module and/or view, then you will not have the chance to see the affect of your category security. Details on setting user security at the module/view level can be found in the Quality Link Help and How-To document.
**Module: Employees**

The Employees module provides features that allow you to manage the employees of your company. Employees can be assigned to one or more categories for easy classification, and they can even be associated to one or more departments which help determine the training they may be required to take.

The Employees module even offers features that automatically update other important parts of your quality system. For example, inactivating an employee will automatically prompt you for the inactivation of employee owned gages. This module also helps you manage the different skill sets required for your company. Once skills have been identified, you can assign them to your employees and rank them using user-defined skill levels. This is useful in determining new project requirements, employee goals, and can even assist in employee evaluations. Additionally, a Job Description view provides a repository for all of your company-wide job descriptions.

**Add a New Employee**

1. Select the Employees module.

2. Select the Employee Master view.

3. Navigate to the top left corner of the Employees tab and click on New Employee.

The following New Employees Properties window will open.
4. In the **Employee ID** box, type a unique identifier for this employee. This identifier will distinguish this employee from other employees in your quality system. This can be a numeric or alphanumeric identifier and commonly matches the employee’s corporate id so references can be made across other applications and/or paper-based systems.

5. **Enter the Last Name, First Name and Middle Name.** These are used to build the full name of the employee and are for identification purposes only.

6. The **File As** field will be constructed based on the values entered for the last, first, and middle names. This is for informational purposes only and can be customized if the default suggestion is not appropriate.

7. **Select a Status for this employee.** For new employees, the status will default to “Active”. However, you can modify this status to “Inactive” or “Suspended”. Modifying the status to “Inactive” or “Suspended” is typically done when employees leave the company, but you still want to maintain a historical context (e.g. you want to keep their training history, skill level history, etc…)

8. **Enter the Hire Date.** This is the date the employee was hired into the organization. This is for informational purposes only.

9. **Enter the Birth Date.** This is the employee’s birth date. This is for informational purposes only.

10. **Enter the Exit Date.** This is the date the employee left the organization. This is for informational purposes only.

11. **Enter the SSN.** This is the employee social security number. This is for informational purposes only.

12. **Enter the Departments to which this employee belongs.** When selecting departments, it is important to note that training requirements are optionally established by department. This means you may want to assign an
employee to more than one department based on how you decide to set up your training requirements. For example, if you have an Engineering Manager you may want to assign this employee to both an “Engineering” department and a “Management” department, especially if you have different training requirements for each department, and you would like to ensure this employee meets those requirements.

13. Enter the **Job Title** for this employee. When selecting a job title, it is important to note that training requirements are optionally established by job title.

14. In the **Address, City, State/Province, and Zip/Postal Code** boxes, enter the respective data. The text contained in these fields is informational only.

15. In the **Reports To** dropdown, select the employee’s manager. The text contained in these fields is informational only.

16. Select **Save & Close** when finished.
Delete an Employee

1. Select the Employees module.

2. Select the Employee Master view.

3. Navigate to the Info Grid and select the employee you would like to delete.

4. Select Delete Employee located on the Employees tab. You will be prompted with a confirmation dialog. Select ‘Yes’ to confirm the delete.

If the employee is not associated to any other records in your quality system you will be able to delete them. However, it is often the case that you will not be able to delete employees because they have associations to other records contained within your quality system.

For example, if the employee you are trying to delete has completed training and you have a record of this in your quality system you may experience the following error when trying to delete an employee.

![Error Occurred](image)

If you would still like to delete this employee, then you must first find and delete the associated training session. Once all references to this employee have been removed from your quality system then you will be able to delete the employee.
Manage Employee Contact Information

Quality Link provides a dedicated section for each employee to help you manage the various types of contact information you may need.

1. Select the Employees module.

2. Select the Employee Master view.

3. Navigate to the Info Grid and select the employee you would like to edit their contact information.

4. Select Contact Information located on the Employees tab.

The following dialog will open and the Contact Information section will be displayed.
Manage Departments

Managing departments, and the employees assigned to those departments, may become an important strategy for your organization. This is especially important should you choose to implement any of the training requirement features found within the Training module. Not only is the departmental information informative, but it is also used to help dynamically generate reports indicating which employees still need to be trained on items previously entered into your quality system.

To manage departments:

1. Select the Employee Master view located within the Employees module.

![Employees module view](image)

2. Select Manage Departments located on the Employees tab.

![Manage Departments window](image)

The following Manage Departments window will open. This can be used to Add, Delete or Rename Departments

3. Make the appropriate additions, changes, or deletions and click Close.
Edit or Add a New Employee Skill

Depending on the level of detail you would like to manage for each of your employees, you can optionally use the employee skills feature to enter different skills, skill levels, and date achieved.

To edit or add an employee skill:

1. Select the **Employee Master** view available from within the **Employees** module.

2. Select the employee you would like to manage skills for from the **Info Grid**.

3. Select **Show Skills** to edit or add employee skills.

The following **Employee Skills** window will open.
This window can be used to edit and add the skill(s) assigned to an employee.

Selecting a cell in the **Skill** column will show a drop down list of available skills that you can add for this employee. This dropdown list of skills is populated from data entered into the Skill Master view.

A dropdown list will also appear for the **Skill Level**. This information is also populated from data entered in the Skills Master view.

Finally, you can optionally enter the date in which a particular skill was achieved in the **Date Achieved** column. This information is for informational purposes only.

You can also use the **Notes** column for additional commentary.

4. Select **OK** to save this data.
Add New Skill
You can easily add new skills to your quality system which can be used to better manage your employees.

To add a new skill:

1. Select the **Skill Master** view located within the **Employees** module.

2. Select **New Skill** located on the Employees tab.

The following New Skill Properties window will open.
3. **In the Skill text box, enter a name for the new skill.** A skill name can be anything that represents a skill you would like to track for your employees. Some examples include: Assembly, Balance Machine, and Carbide Grinding for the manufacturing industry, or Cytogenetics, Cytopathology, or Flow Cytometry for the medical industry. You can even get specific and create skills for individual equipment within your organization (e.g. CX 5 Delta, EPICS ALTRA, UniCel DXi, etc…)

4. Use the **Description** area to input additional data.

5. Select **Save & Close** when finished.

**Manage Skill Levels**

Skill levels are used to identify the level of achievement a particular employee has earned for a given skill. Although Quality Link comes with some default skill levels, you have the option of creating and managing the skill levels that make the most sense for your organization.

To manage skills levels:

1. Select the **Skill Master** view located within the **Employees** module.

2. Select **Manage Skill Levels** located on the Employees tab.

The following Manage Skills dialog will open. This can be used to **Add**, **Delete** or **Rename** skills.
3. Make the appropriate additions, changes, or deletions and click Close.

Show Employees with Skill

If you would rather view all of the employees with a given skill, as opposed to all the skills for a given employee, which you can do in the Employee Master view, then you can perform the following:

1. Select the **Skill Master** view located within the **Employees** module.

2. Select the skill you would like to know which employees have from the **Info Grid**.

3. Select **Show Employees with Skill** located on the Employees tab.
The following Employees with Skill window can be used to add a new employee(s) to this skill or edit existing information.

Add a Job Description

Managing and assigning job descriptions are similar in importance to managing and assigning departments, depending on your use of the Training module. The job description information is informative as well as useful in helping generate a complete list of employees that have both met (and not met) specific training requirements.

To add a new job description:

1. Select the Job Description Master view available from within the Employees module.
2. Select **New Job Description** located on the Employees tab.

The following **New Job Description** window will open.

3. **Enter a Job Title** for the new job description. This is the official name of the job and will be referenced when selecting a job title for new employees (via the employees property dialog). In addition, the job title will be referenced when implementing training requirements as you can base your required training on specific job titles.

4. **Select an Associated Document** from the dropdown to assign an existing published document to this job description. This will allow you to use all of the editing features of your favorite word processor when creating and storing detailed job descriptions.

5. **Enter any Notes** for this job description. This is for informational purposes only.
6. Select **Save & Close** when finished

**Show Required Job Skills**

The job skills feature of Quality Link is used to associate one or more skills to a particular job description. This information could be useful if you need to ensure that the employees currently assigned to a job description have met the skill requirements. It can also be used by employees seeking a promotion as they can better understand what skills may be needed in the future.

To show the skills associated to a job description:

1. Select the **Job Description Master** view available from within the **Employees** module.

2. Select the job description you would like to show the skills for from the **Info Grid**.

3. Select **Show Required Job Skills** located on the Employees tab.

   The following Required Job Skills dialog can be used to list all the skills required for the selected job description. Check/Select the skills required for this job.
Required Job Skills

This listing shows all of the skills that are required for the selected job description. Using the checkboxes below you can indicate which skills are required or not required for the job description. This information can be used to determine whether or not an employee has the required skills for their existing or planned job.

- ASSEMBLY
- BALANCE MACHINE
- BLANCHARD GRINDING
- BRIDGEPORT MILL
- CARBIDE GRINDING
- MICROSOFT WORD
Module: Equipment

The Equipment module can be used to manage any piece of equipment quickly and easily. You can create any type of maintenance you want and then assign it to your equipment. A complete preventive maintenance schedule, as well as other types of equipment schedules, can be created with just a few mouse clicks.

Add New Equipment

1. Navigate to the Equipment module.

2. Select the Equipment Master view.


The following New Equipment properties window will open.
4. **In the Equipment ID box**, type a unique identifier for this equipment. This can be anything you need it to be; however, it is common to have something identifiable so it can be referenced easily, such as, CNC-001, CNC-002, LSR-001, LSR-002, SVM-001, SVM-002, etc…

5. **Enter a Description.** This is an informational field that is used to further describe the equipment, such as CNC Lathe Machine, Laser Cutting Machine, Support Vector Machine, etc…

6. **Select an Equipment Type from the dropdown.** The equipment type provides a way to classify your equipment. Example equipment types include: CNC Lathe, Laser, Air Compressor, or any other ‘type’ you may want to add. Equipment types are customizable so you can add, edit, and delete types that fit your unique needs.

7. **Select an Equipment Location from the dropdown.** The equipment location field lets you record where in your facility this particular piece of equipment is located. You can then easily sort and or group by equipment location if you would like a way to easily see where equipment is located within your facility.

8. **Select a Status from the dropdown.** The equipment status lets you specific whether a particular piece of equipment is “In Service” or “Not in Service”. The status field is also customizable and you can add your statuses to meet your needs.

9. **Select whether or not the equipment is Key Equipment by checking the key equipment checkbox.** The key equipment term is a generic term with a loose definition used to indicate “important” equipment. Originally,
this term was used for ISO, QS, and TS standards to keep track of equipment that is part of a process that requires maintenance and possibly customer notification if something were to change in a process where “Key Equipment” is involved. This field can be used for these purposes; or, it can be used as a generic field for your own reference to designate important equipment within your organization.

10. **In the Manufacturer box, enter a name for the manufacturer of this equipment.** The details entered here are informational only.

11. **Select a Part Supplier from the dropdown.** This dropdown is populated with suppliers previously entered via the Suppliers module and is for informational purposes.

12. **Select a Service Supplier from the dropdown.** This dropdown is populated with suppliers previously entered via the Suppliers module and is for informational purposes.

13. **Enter a Placed in Service date.** This date represents the date this equipment became operational.

14. **Enter a Retirement Date.** This date represents the date this equipment became no longer operational (i.e. retired).

15. **Enter a Serial # for this equipment.** This is an informational only field, but it can be useful when calling for service to have this data handy. Feel free to leverage this field to store these details.

16. **Enter a Model # for this equipment.** This is an informational only field, but it can be useful when calling for service to have this data handy. Feel free to leverage this field to store these details.

17. **Select an Ownership Type from the dropdown.** Since equipment can come from many different sources, you can leverage this field to indicate if the equipment is owned by the Company, Customer, Employee or Supplier. You can also select if this is Leased or Purchased using the list of options available in this dropdown.

18. **Enter the Owner details.** This represent a more granular description of the Ownership Type. For example, if the ownership type is “Employee” then you may want to enter the name of the employee that owns this particular piece of equipment.

19. **Enter the Purchase Date and/or Date Sold.** These fields are informational only and used to keep additional details for your equipment.

20. **Enter the Purchase Price, Selling Price, Salvage Value and/or Book Value.** These fields are informational only and used to keep additional details for your equipment.

21. **Select Save & Close when finished.**
Manage Equipment Locations

Equipment locations are used to identify the physical location of your equipment. This provides users of Quality Link an easy way to locate equipment within your organization.

To manage equipment locations:

1. Navigate to the **Equipment** module.

2. Select the **Equipment Master** view.

   ![Equipment Module](attachment:image.png)

3. Select **Manage Equipment Locations** located on the Equipment tab.

   ![Manage Equipment Locations](attachment:image.png)

   The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** equipment locations.

4. Make the appropriate additions, changes, or deletions and click **Close**.

   ![Manage Equipment Locations Dialog](attachment:image.png)
Manage Equipment Types

Equipment types are used as a way to classify similar kinds of equipment. Using the information grid, you can easily group your equipment items by type. This can help determine the exact number of equipment items (by type), or can be used to more quickly find a specific equipment item.

To manage equipment types:

1. Navigate to the Equipment module.
2. Select the Equipment Master view.
3. Select Manage Equipment Types located on the Equipment tab.

The following dialog will be displayed and can be used to Add, Delete, and Rename equipment types.

4. Make the appropriate additions, changes, or deletions and click Close.
Manage Equipment Status

The equipment status is used as a way to identify whether or not an equipment item is ‘In Service’ or ‘Not In Service’. However, you can also add your own statuses and manage equipment according to your organizations standards.

To manage the equipment status:

1. Navigate to the Equipment module.

2. Select the Equipment Master view.

3. Select Manage Equipment Status located on the Equipment tab.

   The following dialog will be displayed and can be used to Add, Delete, and Rename equipment statuses.

4. Make the appropriate additions, changes, or deletions and click Close.
Schedule Equipment Maintenance

In most organizations, the equipment you use will need to undergo various types of maintenance throughout the year. Quality Link provides you with a method to help you keep track of not only your equipment, but also when, and what type, of maintenance is required. The ‘Schedule Equipment Maintenance’ task allows you to set a recurrence schedule for custom-defined maintenance types. This could be an annual check-up, a monthly shut-down for service, an upgrade to the hardware, or even a weekly calibration.

Once a maintenance item is completed, Quality Link will automatically check the recurrence/frequency (if it exists) and schedule the next maintenance due date. These scheduled items will be available in both the Equipment Maintenance view as well as in your Event Center to help ensure you never miss a maintenance task.

The scheduling of equipment maintenance can be applied to any equipment item contained within your quality system.

To schedule equipment maintenance:

1. Navigate to the Equipment module.

2. Select the Equipment Master view.

3. Select the equipment you would like to schedule maintenance for from the Information Grid.

The following New Equipment Maintenance properties window will open.

5. In the **Equipment ID** box, select an existing equipment item, or just verify that the already selected equipment is correct. The dropdown is populated with all existing equipment currently loaded into your quality system.

6. In the **Maintenance Type** dropdown, select the type of maintenance you will be scheduling for this equipment. Common maintenance types include Calibrations, Installations, Routine Maintenance, etc… The types of maintenance available in this dropdown can be customized (refer to the section titled “Manage Maintenance Types” for more information on how to accomplish this).

7. Select the checkbox **Part of Scheduled Maintenance** if this entry is considered part of your expected/scheduled maintenance. Otherwise, you may want to keep this unselected as it will indicate that the maintenance was unplanned, which may be useful in your reports and analysis of your planned vs. unplanned maintenance.

8. In the **Subject** box, type a description for this maintenance item.
9. **Select a Due Date.** If the maintenance is not marked as complete prior to this date, then it will show as overdue in your Event Center and in your Equipment Maintenance views highlighted in red.

10. **Select a Status from the dropdown.** If this is a new maintenance record, the status will remain as ‘Not Started’. However, you have the option to select from one of many different statuses as it pertains to the current state of this maintenance item.

11. **Select a Priority from the dropdown.** The priority provides an easy way to classify your maintenance for later sorting and grouping and lets you more easily find important maintenance items.

12. **The Event Type is pre-populated with the term “Equipment Maintenance”.** This is to instruct Quality Link of the type of event being recorded.

13. **Select an Assigned To user id from the dropdown.** This determines who will be responsible for ensuring this maintenance is completed. By default, the Assigned To user id will be that of the currently logged in user; however, you can modify this and select an alternate user as the person responsible by selecting another user from the dropdown. The Assigned To dropdown is populated with a list of active users (based on users entered in your Administration module).

14. **Select a Created On date.** For new maintenance, this will default to the current date and time. However, you can adjust this as needed to reflect the actual created on date.

15. **Select a Completed By person from the dropdown.** After completing a maintenance task, you have the option of documenting the person that completed this activity. The Completed By dropdown is populated with a list of active employee names (based on items entered in your Employee module), or it can be populated with any custom text as it is a free-form text box.

16. **Select a Completed On date.** For new maintenance schedules, this should be left blank. However, if you are finished with this maintenance and want to identify this as completed, then you should select the appropriate date to indicate the completion date.

17. **In the Notes box, type additional information as it pertains to this maintenance.**

18. **In the Reference Number box, enter any additional information you may want to record for this maintenance.** This is a free-form text field and is for informational purposes only.

19. **In the Condition box, enter the state of the equipment as it pertains to the timing of this maintenance.** This is a free-form text field and is for informational purposes only.

20. **In the Cost box, enter the cost of this particular maintenance.** This is a currency field and is for informational purposes only. You may later want to construct custom reports that utilize this information.

21. **Determine if the event should be marked as Private.** Maintenance marked as private will only be visible by the ‘Owner’ and by the ‘Assigned To’ user. Maintenance that are not marked as private will be visible by anyone that has access to the Events module and to the Equipment Maintenance view.
22. To make the maintenance recurring, click Set Recurrence. This will display the Recurrence dialog. Select the recurrence pattern (Daily, Weekly, Monthly, or Yearly) with which the event recurs, and then select options for the frequency. Click OK.

23. Click Save & Close to keep your changes.

Note: You can use the Custom Fields section to input additional data.

Note: You can optionally schedule new equipment maintenance by selecting the [New Equipment Maintenance] task located in the [Equipment Maintenance] view. The only difference is that you will have to manually select the equipment item from the Equipment ID dropdown; whereas, the process described above automatically populates the Equipment ID for you.
**Edit or Delete Equipment Maintenance**

Once you have scheduled your equipment maintenance you may later realize that you need to update this information, or completely remove it from your system. You can accomplish both the editing and deleting of your existing equipment maintenance items by using features available in the Equipment Maintenance view.

To edit (or delete) equipment maintenance:

1. Navigate to the **Equipment** module.
2. Select the **Equipment Maintenance** view.
3. Select the equipment maintenance you would like to edit (or delete) from the **Info Grid**.
4. Select **Edit Equipment Maintenance** or **Delete Equipment Maintenance** pending your desired action.
Manage Maintenance Types

Maintenance types are used as a way to establish more than one type of maintenance for the same equipment item. For example, you may conduct annual, monthly, and weekly maintenance – all for different reasons. Successfully managing your maintenance types can be an important part of keeping your equipment up to date and functioning properly.

To manage maintenance types:

1. Navigate to the Equipment module.

2. Select the Equipment Maintenance view.

3. Select Manage Maintenance Types located on the Equipment tab.

The following dialog will be displayed and can be used to Add, Delete, and Rename maintenance types.

4. Make the appropriate additions, changes, or deletions and click Close.
Set Maintenance Recurrence

It is quite common to have recurring events (i.e. events that happen on a regular and predetermined basis). Quality Link supports adding a frequency to any of your events, including your equipment maintenance, that consist of daily, weekly, monthly, or yearly recurrences.

To set the recurrence/frequency of a maintenance item:

1. Navigate to the **Info Grid** and select the scheduled maintenance.

   ![Info Grid](image)

   - **Equipment Maintenance**
     - (All Equipment) 3 Items
     - **Subject**: Equipment Maintenance - crane - Overhead Crane - Preventive Maintenance
     - **Status**: Not Started
     - **Due Date**: 01/01/2014
     - **Completed On**: 01/31/2014
     - **Completed By**: Normal

2. Select **Set Recurrence** located on the Equipment tab.

   ![Set Recurrence](image)

   The following **Event Recurrence** window will open and can be used to set the recurrence pattern for the selected maintenance item.

   ![Event Recurrence](image)
Module: Faults and Actions

Quality Link provides features that let you track and manage your faults, corrective actions, and preventive actions. The Faults and Actions module provides you with a comprehensive interface for managing virtually every aspect of all your faults and actions – you can even create your own types of actions!

Add a New Fault

1. Navigate to the **Faults and Actions** module and select the **Fault Master** view.

![Fault Master View](image1)

2. Select **New Fault** located on the Faults and Actions tab.

![New Fault Window](image2)

The following **New Fault** properties window will open.
3. In the **Fault ID** box, type a unique identifier to identify this fault, or use the pre-determined value entered by Quality Link. Quality Link will automatically generate the next available fault id based on the last fault created. You can override this default value or leave it as it.

4. Select a **Fault Source** from the dropdown list of values. The fault source can be used for reporting and organization purposes and generally consists of “high level” information, such as a fault source of “Customer”, “Supplier”, “Employee”, “Training”, etc… You will use the Fault Detail dropdown to further clarify the fault.

5. Select a **Fault Detail** from the dropdown list of values. The fault detail is a more granular specification of the fault. This is both a free-form field and a dropdown. However, the dropdown will only be populated if the term “customer”, “supplier”, or “employee” is listed in the Fault Source. If this is the case, then Quality Link will automatically populate the Fault Detail with relevant values indicative of the Fault Source; otherwise, you will have to type in the Fault Detail pertinent to the fault.

6. **Enter a Fault Date.** This represents the date the fault occurred.

7. **Enter a Fault Time.** This represents the time the fault occurred.

8. Select a **Fault Location** from the dropdown list of values. The fault location describes the physical location of where the fault occurred. This field is informational, but is commonly used in reporting to identify a particular area for improvement.

9. Select an **Observed By** person from the dropdown. This is the person that observed the fault. The Observed By dropdown is populated with a list of active employee names (based on items entered in your Employee module), or it can be populated with any custom text as it is a free-form text box.

10. Select a **Malfunction Code** from the dropdown. This is a user-defined list of values that generally include common malfunction codes specific to your organization. This field is for informational purposes only.

11. Select a **Detection Code** from the dropdown. This is a user-defined list of values that generally include common detection codes specific to your organization. This field is for informational purposes only.

12. In the **Description** box, enter any the details you would like to record for this fault. The text contained in this field is informational only but should accurately describe the fault as documented for historical purposes.

13. Select a **Related Action** from the dropdown. This is an optional field, but is generally very helpful in establishing the relationship from a known fault (or set of faults) and the corrective action that has been put in place to address the issue. It is also possible, and quite normal, to have a single corrective action address more than one fault. For example, your quality control processes may record ten different faults, which are all related, and then subsequently addressed by a single corrective action. This is the dropdown you would use to establish that type of relationship between faults and actions.
Edit or Delete Fault

1. Select the **Faults and Actions** module.

2. Select the **Fault Master** view.

3. Select the fault you would like to edit (or delete) from the **Info Grid**

4. Select **Edit Fault** or **Delete Fault** pending your desired action.
Manage Fault Locations

Fault locations are used to identify the location of where the fault occurred. This provides users of Quality Link an easy way to not only find and analyze various faults, but also allows for detailed reports which may show actionable trends over a period of time.

To manage fault locations:

1. Select the **Faults and Actions** module.

2. Select the **Fault Master** view.

3. Select **Manage Fault Locations** located on the Faults and Actions tab.

   The following dialog will be displayed and can be used to **Add**, **Delete** or **Rename** fault locations.

4. Make the appropriate additions, changes, or deletions and click **Close**.
Manage Fault Sources

A fault source is generally used to indicate the source of the problem, or a reason why the fault was created in the first place. Some common examples of fault sources include Customer Complaints, Design Process, and Employee Training, although you can add, update, and delete any fault source to fit the needs of your corporation. Fault sources provide users of Quality Link an easy way to find and analyze information, as well as an opportunity to generate detailed reports that can be used for analysis of your faults.

To manage fault sources:

1. Select the **Faults and Actions** module.

2. Select the **Fault Master** view.

3. Select **Manage Fault Source** located on the Faults and Actions tab.

The following dialog will be displayed and can be used to **Add**, **Delete** or **Rename** fault sources.

4. Make the appropriate additions, changes, or deletions and click **Close**.
Manage Malfunction Codes

Malfunction codes are an optional fault identification field and they may or may not apply to any given fault. Normally, this information is buried in the details and/or notes of a fault. However, should you wish to use this field as another way to further identify your faults, it can provide the needed insight as you can group, sort, and search by specific malfunction codes from within the Info Grid.

To manage malfunction codes:

1. Select the Faults and Actions module.

2. Select the Fault Master view.

3. Select Manage Malfunction Codes located on the Faults and Actions tab.

The following dialog will be displayed and can be used to Add, Delete or Rename malfunction codes.

4. Make the appropriate additions, changes, or deletions and click Close.
Manage Detection Codes

Detection codes are similar to malfunction codes in that they are an optional fault identification field and they may or may not apply to any given fault. Normally, this information is buried in the details and/or notes of a fault. However, should you wish to use this field as a way to further identify your faults, it can provide the needed insight as you can group, sort, and search by specific detection codes from within the Info Grid.

To manage detection codes:

1. Select the Faults and Actions module.
2. Select the Fault Master view.

![Faults and Actions Module]

3. Select Manage Detection Codes located on the Faults and Actions tab.

The following dialog will be displayed and can be used to Add, Delete or Rename detection codes.

![Manage Detection Codes Dialog]

4. Make the appropriate additions, changes, or deletions and click Close.
Schedule Corrective Action

For convenience, you can optionally schedule a corrective from within the Fault Master view. This feature is the same as selecting ‘New Action’ from within the Corrective Actions view.

To schedule a corrective action:

1. Select the **Fault Master** view available from within the **Faults and Actions** module.

2. Select **Schedule Corrective Action** from the Faults and Actions tab.

The following **New Action Properties** window will be displayed.
3. In the **Action ID** box, enter a new Action ID, or verify that the pre-determined Action ID reflects what you need. The Action ID is automatically populated by Quality Link and is based on the last ID that was created.

4. Select the **Action Type** from the dropdown. This field is used to identify the type of action you are recording and is commonly represented by a designation of either “Corrective Action” or “Preventive Action”. While both of these selections are available by default, you can also elect to add additional Action Type’s to better fit your needs.

5. Select a **Verified By** name from the dropdown or enter your own name. The Verified By dropdown is populated with a list of active employee names (based on items entered in your Employee module), or it can be populated with any custom text as it is a free-form text box.

6. Select a **Nonconformance Source** from the dropdown. The dropdown values for a nonconformance source are the same list of values available for a fault source. This list is also customizable and can be adapted to your needs. Review the topic titled “Manage Fault Sources” for more information on how to customize this list of values.

7. Select a **Nonconformance Detail** from the dropdown. The nonconformance detail is a more granular specification of the nonconformance. This is both a free-form field and a dropdown. However, the dropdown will only be populated if the term “customer”, “supplier”, or “employee” is listed in the Nonconformance Source. If this is the case, then Quality Link will automatically populate the Nonconformance Detail with relevant values indicative of the Nonconformance Source; otherwise, you will have to type in the Nonconformance Detail pertinent to the action.

8. Select a **Root Cause** from the dropdown. The root cause is used to identify where the problem ultimately derived. There are standard reports within Quality Link that utilize this field for analytical purposes, and you can also create your own reports to further leverage the values stored in this field.

9. In the **Subject** box, type a description for this action item.

10. Select a **Due Date**. If the action is not marked as complete prior to this date, then it will show as overdue in your Event Center and in your Corrective Actions view highlighted in red.

11. Select a **Status** from the dropdown. If this is a new action, the status will remain as ‘Not Started’. However, you have the option to select from one of many different statuses as it pertains to the current state of this action.

12. Select a **Priority** from the dropdown. The priority provides an easy way to classify your action for later sorting and grouping and lets you more easily find important actions.

13. The **Event Type** is pre-populated with the term “Corrective/Preventive Action”. This is to instruct Quality Link of the type of event being recorded.

14. Select an **Assigned To** user id from the dropdown. This determines who will be responsible for ensuring this action is completed. By default, the Assigned To user id will be that of the currently logged in user; however, you can modify this and select an alternate user as the person responsible by selecting another user from the dropdown. The Assigned To dropdown is populated with a list of active users (based on users entered in your Administration module).
15. Select an **Opened On** date. For new actions, this will default to the current date. However, you can adjust this as needed to reflect the actual opened on date.

16. Select a **Completed On** date. For new actions, this should be left blank. However, if you are finished with this action and want to identify this as completed, then you should select the appropriate date to indicate the completion date.

17. Select a **Completed By** person from the dropdown. After completing an action, you have the option of documenting the person that completed this activity. The Completed By dropdown is populated with a list of active employee names (based on items entered in your Employee module), or it can be populated with any custom text as it is a free-form text box.

18. In the **Description** box, type additional information as it pertains to this action.

19. In the **Interim Action, Final Action, Verification, Root Cause Detail,** and **Notes** tabs, enter any additional detail you want to record for this item. These tabs consist of free-form text fields and are used to maintain a detailed view of the steps and notes used to implement the solution.

20. To make the action recurring, click **Set Recurrence.** This will display the Recurrence dialog. Select the recurrence pattern (Daily, Weekly, Monthly, or Yearly) with which the event recurs, and then select options for the frequency. Click OK.

21. Click **Save & Close** to keep your changes.

**Add a New Corrective Action**

You can easily add a new corrective or preventive action to your Quality System. You can even relate the specific action to one or more faults!

To create a new action (corrective or preventive):

1. Select the **Corrective Actions** view available from within the **Faults and Actions** module.

2. Select **New Action** from the Faults and Actions tab.
The following **New Action Properties** window will be displayed.

![New Action Properties window](image)

**Note:** Adding/Creating a new correction action requires the same set of steps as scheduling a corrective action. This is because all actions have a due date (i.e. they are scheduled) and leverage the same fields used to capture information. You can refer to the previous section titled “Schedule a Corrective Action” for a description of the fields available for use.
Edit or Delete Action

1. Select the **Corrective Actions** view available from within the **Faults and Actions** module.

   ![Faults and Actions](Image)

2. Select the action you would like to edit (or delete) from the **Info Grid**.

   ![Info Grid](Image)

3. Select **Edit Action** or **Delete Action** pending your need.
Email Corrective Action

You may sometimes find it necessary to share your corrective/preventive action data with other users, employees, or even auditors. You can easily insert all of your action data into an email by following these steps:

1. Select the **Corrective Actions** view available from within the **Faults and Actions** module.

2. Select the action you would like to email from the **Info Grid**.

3. Select **Email Action** from the Faults and Actions tab.

Note: Your “default” email editor will open, and all associated details will be added to the [Body] of the email message for the corrective/preventive action you selected.
4. Enter the email address in the [To…] text box, and then add any additional information you would like to include within the [Body] of your email.

5. Click Send to email the details of your corrective/preventive action.
Manage Action Types

Action types typically represent whether or not the action is classified as ‘Corrective’ or ‘Preventive’. However, Quality Link gives you the flexibility to manage these types and even create your own.

To manage action types:

1. Select the Corrective Actions view available from within the Faults and Actions module.

2. Select Manage Action Types located on the Faults and Actions tab.

   The following dialog will be displayed and can be used to Add, Delete or Rename action types.

3. Make the appropriate additions, changes, or deletions and click Close.
Manage Fault Sources

Fault sources are used to indicate the source of problem, or reason why a fault was created. The ability to manage fault sources is available in both the Corrective Actions view as well as the Fault Master view. The steps below show you how to manage fault sources from with the Corrective Actions view.

To manage fault sources:

1. Select the **Corrective Actions** view available from within the **Faults and Actions** module.

   ![Faults and Actions View](Image)

   **Faults and Actions**
   
   Views
   - Fault Master
   - Corrective Actions

2. Select **Manage Fault Sources** located on the Faults and Actions tab.

   ![Manage Fault Sources Dialog](Image)

   The following dialog will be displayed and can be used to **Add**, **Delete** or **Rename** fault sources.

3. Make the appropriate additions, changes, or deletions and click **Close**.
**Manage Root Causes**

A root cause generally represents the initiating cause, commonly as part of a chain of events, which leads to a specific effect. Quality Link uses the root cause field as an identifying element of your corrective actions. There are also reports which you can run that show your root cause aggregations over time. The steps below show you how to manage root causes.

To manage root causes:

1. Select the **Corrective Actions** view available from within the **Faults and Actions** module.

2. Select **Manage Root Causes** located on the Faults and Actions tab.

   ![Faults and Actions](image)

   The following dialog will be displayed and can be used to **Add**, **Delete** or **Rename** root causes.

3. Make the appropriate additions, changes, or deletions and click **Close**.
Set Corrective Action Recurrence

Should you need to monitor the results of a corrective action, you can easily add a recurrence element to your action. This will ensure that an event is generated for this action and made available to you for review at a future date via your Event Center.

To set a recurrence for an action:

1. Select the **Corrective Actions** view available from within the **Faults and Actions** module.

2. Navigate to the **Info Grid** and select a corrective action.

3. Select **Set Recurrence** from the Faults and Actions tab.

The following **Event Recurrence** window will open and can be used to set the recurrence pattern for the selected corrective action.
After a corrective action is completed, which is determined by updating the [Status] or entering a [Completed On] date, a new corrective action is scheduled automatically based on your selected recurrence pattern. The new corrective action will be available via the Corrective Actions view and via the Event Center.
Add Related Faults

Since corrective actions can be created based on the findings of one or more faults which have occurred you have the option of relating your action to any fault in your quality system. This is a great way to keep track of which faults have actions assigned to them, and which faults do not.

To relate a fault to your corrective action:

1. Select the Corrective Actions view available from within the Faults and Actions module.

2. Navigate to the Info Grid and select a corrective action.

3. Select Related Faults from the Faults and Actions tab.

The following Action Property dialog will be displayed with the Related Faults section open. Here you can add a New Fault, Edit/View Fault, Link an Existing Fault or Remove Link.
4. Once you have related any associated faults to this corrective action you can select **Save & Close** to exit.
Module: Gages

The Gage Master module provides many features that make gage management simple. You can create your own gage classifications and gage locations. You can assign and view gage ownership by company, customer, employee, or supplier. You can easily manage your entire calibration and gage R&R schedules. You can even link your gages to existing calibration work instructions and preview them on-line.

Add a New Gage

1. Select the Gages module.

2. Select the Gage Master view.


   The following New Gage properties window will open.
4. In the **Gage ID** box, type a unique identifier for this gage. This identifier will distinguish this gage from other gages in your quality system. This can be a numeric or alphanumeric identifier. It is not uncommon to start with 001, 002, 003, etc… The number of leading zeroes will depend on the number of gages you will be managing.

5. Select a **Status** for this gage. For new gages, the status will default to “Active”. However, you can modify this status to “Inactive” as needed. Marking a gage as “Inactive”, instead of deleting it from your quality system, will ensure any history associated with a gage remains in your quality system.

6. Enter the **Description**. This an informational field used to further identify the gage. Descriptive examples include: Mitutoyo 0-1” Micrometer, Starrett 8-9” Micrometer, etc…

7. Select a **Type** from the dropdown. The gage type provides a way to classify your gages. Example gage types include: Bore Gage, Caliper, Hardness Tester, etc… Gage types are customizable so you can add, edit, and delete types that fit your unique needs.

8. Select a **Location** from the dropdown. The gage location provides a way to keep track of where your gages are physically located. Example gage locations CNC Mill Department, Grind Department, etc… Gage locations are customizable so you can add, edit, and delete locations that fit your unique needs.

9. Enter the **Manufacturer**. This is a descriptive field used to keep additional information for the selected gage.

10. Enter the **Serial #**. This is a descriptive field used to keep additional information for the selected gage.
11. Enter the **Model #**. This is a descriptive field used to keep additional information for the selected gage.

12. Enter the **Unit of Measure**. This is a descriptive field used to keep additional information for the selected gage.

13. Enter the **Purchase Date**. This is the date the gage was purchased. This is for informational purposes only.

14. Enter the **Placed in Service Date**. This is the date the gage started was first placed in service. This can help identify how old, or new, a gage may be when considering replacement. This is for informational purposes only.

15. Enter the **Retirement Date**. This is the data the gage was taken out of service and retired from operation. This is for informational purposes only.

16. Select an **Ownership Type** from the dropdown. This is used to help determine whether the gage belongs to the company, an employee, a customer, or even a supplier.

17. Select an **Owner** for this gage. Based on the “Ownership Type” selected, this dropdown will consist of employees, customers, or suppliers previously entered into your system. This is also a free-form field so you can enter specific details if one of the corresponding dropdown options does not align with your preferences.

18. Enter the **Cost**. This is the purchase cost of the gage (in U.S. dollars). This is for informational purposes only.

Select **Save & Close** when finished.

**Edit or Delete a Gage**

1. Select the **Gages** module.

2. Select the **Gage Master** view.

3. Select the gage you would like to edit (or delete) from the **Info Grid**
4. Select **Edit Gage** or **Delete Gage** pending your desired action

**Manage Gage Types**

Gage types are used as a way to classify similar kinds of gages. Using the information grid, you can easily group your gages by type. This can help determine the exact number of gages (by type), or can be used to more quickly find a specific gage.

1. Select the **Gages** module.

2. Select the **Gage Master** view.

3. Select **Manage Gage Types** located on the Gages tab.

The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** gage types.
4. Make the appropriate additions, changes, or deletions and click **Close**.

**Manage Gage Locations**

Gage locations are used to identify the physical location of your gage. This provides users of Quality Link an easy way to locate gages within your organization.

1. Select the **Gages** module.

2. Select the **Gage Master** view.

3. Select **Manage Gage Locations** located on the Gages tab.

The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** gage locations.
4. Make the appropriate additions, changes, or deletions and click **Close**.

**Manage Gage Status**

The gage status is typically used to identify whether or not a gage is ‘Active’ or ‘Inactive’. However, you can also add your own statuses and manage gages according to your organizations standards.

1. Select the **Gages** module.
2. Select the **Gage Master** view.
3. Select **Manage Gage Status** located on the Gages tab.

The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** gage statuses.
4. Make the appropriate additions, changes, or deletions and click **Close**.

**Schedule Gage Calibration or Gage R&R**

For convenience, you can optionally schedule gage calibrations or gage R&R studies from within the Gage Master view. This feature is the same as selecting ‘New Gage Calibration’ from within the Gage Calibrations view or ‘New Gage R&R’ from within the Gage R&R view.

1. Select the **Gages** module.

2. Select the **Gage Master** view.

3. Navigate to the **Info Grid** and select the gage you would like to schedule a calibration or R&R study for.
4. Select **Schedule Gage Calibration** or **Schedule Gage R&R** from the Gages tab.

Depending on your selection, either the New Gage Calibration property window, or the New Gage R&R property windows will be displayed.

The difference between selecting the scheduling options from the Gage Master view as opposed to the Gage Calibrations view or the Gage R&R view is that the Gage ID will be automatically populated based on the gage you selected from within the Info Grid.

5. Input the **Gage Calibration** or **Gage R&R** details. You can optionally use the **Set Recurrence** command to establish a frequency for how often you would like to conduct calibrations or R&R studies. If you have additional items to schedule you can select the **Save & New** button.

6. Select **Save & Close** when finished.
**Add a New Gage Calibration**

You can add new gage calibrations to help manage your gage maintenance schedule and also record the details associated with each of the calibrations.

To add a new gage calibration:

1. Select the **Gages** module.

2. Select the **Gage Calibrations** view.

3. Select **New Gage Calibration** from the Gages tab.
The following New Gage Calibration properties window will open.

4. Select a **Gage ID** from the dropdown. The Gage ID dropdown is automatically populated with existing gages. Select the gage you would like to schedule a calibration for.

5. Enter data into the remaining fields to schedule your calibration.

6. In the Results, Actions, and Findings sections, enter any additional detail you want to record for this item. These sections consist of free-form text fields and are used to maintain additional details for this calibration.

7. In the Custom Fields section, enter any additional information you want to associated to this calibration.

8. Select the Set Recurrence button to display the recurrence dialog in order to schedule recurring calibrations.

9. Click Save & Close to keep your changes.
Edit or Delete Gage Calibration

1. Select the **Gage Calibrations** view available from within the **Gages** module.

2. Select the gage calibration you would like to edit (or delete) from the **Info Grid**.

3. Select **Edit Gage Calibration** or **Delete Gage Calibration** pending your need.
Set Gage Calibration Recurrence

Most gages require a maintenance schedule to ensure they are working as expected over the course of time. Quality Link makes it easy to create your gage maintenance schedule by establishing a recurring calibration timeline. A recurring calibration can be created for every gage in your quality system. Once a calibration is scheduled, it will appear in both your Gage Calibrations view (within Gages module) and in the Event Center (if you are the owner of the calibration or if it is assigned to you).

To set a recurrence for a gage calibration:

1. Select the **Gage Calibrations** view available from within the **Gages** module.

2. Select the gage calibration you would like to schedule a recurrence for from the **Info Grid**.

3. Select **Set Recurrence** located on the Gages tab.

The following **Event Recurrence** window will open and can be used to set the recurrence pattern for the selected calibration.
After a calibration is completed, which is determined by updating the [Status] or entering a [Completed On] date in the Gage Calibration Property window, a new calibration will be scheduled automatically based on your selected recurrence pattern in the dialog above.

The new calibration will be available via the Gage Calibrations view and via the Event Center.

**Add a New Gage R&R Study**

You can add new gage R&R studies to your gage management system. This can assist with all the details you must keep track of as it relates to a Six Sigma methodology, or any PPAP (Production Part Approval Process) documentation requirements you may have.

To add a new gage R&R study:

1. Select the **Gages** module.

2. Select the **Gage R&R** view.

3. Select **New Gage R&R** from the Gages tab.
The following New Gage R&R properties window will open.

4. Select a **Gage ID** from the dropdown. The Gage ID dropdown is automatically populated with existing gages. Select the gage you would like to schedule a calibration for.

5. Enter data into the remaining fields to schedule your R&R study.

6. Select **Edit Study Results** to open a pre-formatted Excel spreadsheet and enter the details of this study.

7. Use the **Notes** and **Custom Fields** section to input additional data.

8. Select the **Set Recurrence** button to display the recurrence dialog in order to schedule recurring R&R studies.

9. Click **Save & Close** to keep your changes.
Edit or Delete Gage R&R Study

1. Select the Gage R&R view available from within the Gages module

2. Select the gage R&R item you would like to edit (or delete) from the Info Grid.

3. Select Edit Gage R&R or Delete Gage R&R pending your need.
Edit Gage R&R Study Source File

1. Select the **Gage R&R** view available from within the **Gages** module

![Gages Module Image]

2. Select the gage R&R item you would like to modify the source file for from the **Info Grid**.

![Info Grid Image]

3. Select **Edit R&R Source File** from the Gages tab.

![Edit R&R Source File Image]

The following R&R (Excel-based) data sheet and report will be displayed.
4. Edit the R&R Data Sheet, review the report, and save your file. This spreadsheet will automatically be linked to your Gage R&R study within Quality Link.
Set Gage R&R Study Recurrence

1. Select the **Gage R&R** view available from within the **Gages** module

![Gages View](image)

2. Select the gage R&R item you would like to schedule a recurrence for from the **Info Grid**.

![Info Grid](image)

3. Select **Set Recurrence** from the Gages tab.

![Gages Tab](image)

The following **Event Recurrence** window will open and can be used to set the recurrence pattern for the selected gage R&R item.
After a gage R&R study is completed, which is determined by updating the [Status] or entering a [Completed On] date in the Gage R&R Property window, a new gage R&R study will be scheduled automatically based on your selected recurrence pattern in the dialog above.

The new gage R&R study will be available via the Gage R&R view and via the Event Center.
Module: Reporting

The Reporting module provides a central location within your quality management system for storing and executing all of your reports. Here you will find reports related to every module in your quality system, and you even have the option of adding new reports as well as customizing the out-of-box reports.

Quality Link currently ships with 112 reports to help you get started with all your reporting needs.

Add New Report

1. Select the Reporting module.

2. Select the Report Master view.


The following New Report properties window will open.
4. In the **Report Name** box, enter a name for this report. The name entered here is referenced throughout other areas of Quality Link. For example, when linking reports to other Quality Link modules/views, this is the name that will be displayed.

5. In the **Description** box, enter details that describe the contents of this report. The description field is for informational purposes only.

6. Select a **Report Type** from the dropdown. The report type provides a way to classify your reports and organize them into logical groupings. Example report types may include: Master List Reports, Scheduling Reports, etc… or any other ‘type’ you may want to add. Report types are customizable so you can add, edit, and delete types that fit your unique needs.

7. Select a **Source File** for this report. Click the **Browse** button to select the source file. Since Quality Link leverages an external report writer (i.e. Crystal Reports) you will need to link your report item to the report source file. After selecting the “Browse…” button, navigate to the report’s source file location and select it from the Browse dialog. All report source files will have a `.rpt` file extension. This will associate the report source file with the newly created report item.

8. Select the checkbox, **This Report Contains a Graph**, if the content of the report has one or more graphs embedded within it. This optional checkbox signifies to Quality Link whether or not a graph icon should be displayed in the Info Grid.
9. Select the checkbox, **This Report Requires Additional Processing**, if the content of the report uses one or more of the Quality Link temporary tables. By default, this field is set correctly for the out-of-box reports and should only be considered for any custom reports you may wish to create.

   Note: Quality Link reports are designed and developed with Crystal Reports®; and although you do not need Crystal Reports installed to select a report file or to execute an existing report, you will need this application installed should you want to customize any of the existing out-of-box reports, or if you want to create new reports from scratch.

10. Select **Save & Close** when finished.

**Edit Report Properties or Delete a Report**

1. Select the **Report Master** view available from within the **Reporting** module.

   ![Report Master View](image)

2. Select the report you would like to edit (or delete) from the **Info Grid**.

   ![Info Grid](image)

3. Select **Edit Report Properties** or **Delete Report** pending your desired action.

   ![Edit Report Properties](image)
Edit Report Source

1. Select the **Report Master** view available from within the **Reporting** module.

2. Select the report you would like to edit the source file for from the **Info Grid**.


Note: If you have a source file associated with this report and you have Crystal Reports installed on your computer, then the Crystal Reports application will open the selected report in Design Mode.

This is where you can modify and/or customize the report to fit your specific needs.
Print or Preview Report

The ability to print or preview a report is a basic operation and applies to every report in your quality system. You can optionally elect to secure various reports by placing them in their own categories and subsequently establishing security for the category to which they belong.

To print or preview a report:

1. Select the **Report Master** view available from within the **Reporting** module.

2. Select the report you would like to print or preview from the **Info Grid**.

3. Select **Print Report** or **Preview Report** located on the Reporting tab.

Selecting the Print Report or Preview Report task will instruct Quality Link to call the appropriate Crystal Report operation and execute the task you have requested. You must have a valid source file associated with a report before either of these operations can be executed.
Manage Report Types

Report types are used as a way to classify similar kinds of reports. Using the information grid, you can easily group your reports by type. This can help determine the exact number of reports (by type), or can be used to more quickly find a specific report.

To manage report types:

1. Select the **Report Master** view available from within the **Reporting** module.

![Report Master View](image1)

2. Select **Manage Report Types** located on the Reporting tab.

![Manage Report Types Dialog](image2)

The following dialog will be displayed and can be used to **Add**, **Delete**, and **Rename** report types.

3. Make the appropriate additions, changes, or deletions and click **Close**.

![Close Button](image3)
Assign Reports to Views

Quality Link provides the capability to access reports through various views within your quality system. By default, all reports are available in the “Report Master” view within “Reporting” module. However, you can assign reports to other views within Quality Link. For example, if you want the “Employee Address Book” available for print/preview from within your “Employees” module, then you can assign this report to this module and users will be able to access it directly from this module.

To assign reports to views:

1. Select the Report Master view available from within the Reporting module.

![Report Master View]

2. Select one or more reports you would like to assign to a specific view from the Info Grid.

![Info Grid]

In this example, we have selected the “Employee Address Book”, and we will assign this to the Employee Master view so it will be accessible via the Employees module.

3. Select Assign Reports to Views located on the Reporting tab.

![Assign Reports to Views]

The following dialog will be displayed and can be used to Assign Reports to Views.
4. Select the checkbox next to Employee Master and click **OK**.

This will ensure that the selected report (e.g. Employee Address Book) is now available via the Employee Master view. You can verify this by navigating to the Employees module and selecting the Employee Master view. You will then see that the Reports section on the Employee tab now has the Employee Address Book available and ready to be viewed (screen shot below).

This is just one example of assigning reports to views within Quality Link. You can use this method to specify exactly what reports are displayed in each of your views/modules. Even your custom reports can assigned to the views/modules of your choice!
Module: Training

The Training module has many features that provide you with a complete training management system. You can easily keep track of document training as well as other custom training. You can even set your own training requirements by department, by employee, or by job description. In addition, you can schedule all of your training in advance and have Quality Link notify you when it's due. All these features and more can be found in the Training module.

Add New Training Item

1. Select the Training module.

2. Select the Training Item Master view.


The following New Training Item properties window will open.
4. **In the Training ID box, type a unique identifier for this training item.** This identifier will distinguish this training item from other training items in your quality system. This can be a numeric or alphanumeric identifier and commonly matches the document id if it will be associated with a document. Otherwise, any unique identifier will do, examples include: 401K, SAFETY101, etc…

5. **Enter the Training Title.** The training title is a descriptive name for the training item and is used for identification purposes only.

6. **Enter the Training Level.** The training level can be used to distinguish between training items that have the same Training ID. For example, if you have a Training ID of “401K”, then you might decide to have a Training Level of “2014” to indicate the year of the training. Alternatively, the Training Level can be indicative of a specific document revision level if the training is associated to a document. For example, you may have a Training ID of “0.0” and a Training Title of “Vision Statement” and Training Level “A”, which corresponds to the document and its revision level. However, when the document revision level moves to “B”, you can adjust the training level and make that “B” as well to stay in sync with your documentation.

7. **Select a Training Type from the dropdown.** The training type provides a way to classify your training items. Example training types include: Policy Training, Procedure Training, Safety Training, etc… Training types are customizable so you can add, edit, and delete types that fit your unique needs.

8. **Select a Status for this training item.** For new training items, the status will default to “Active”. However, you can modify this status to “Inactive” as needed. Marking a training item as “Inactive”, instead of deleting it from your quality system, will ensure any history associated with a training item remains in your quality system.
9. Select a **Delivery Method**. This is an informational field used to identify how the training will be delivered.

10. Select an **Associated Document (optional)**. If you choose to associate a document to this training item then you should select the appropriate document from this dropdown. This will ensure that all relevant fields are pre-populated and that a link between this training item and the selected document is created.

11. Enter any **Notes** for this training item. This is an informational field used to capture additional details.

**Edit or Delete Training Items**

1. Select the 🗃️ **Training** module.

2. Select the **Training Item Master** view.

3. Select the training item you would like to edit (or delete) from the **Info Grid**.

4. Select **Edit Properties** or **Delete Training Item** pending your desired action.
Manage Delivery Methods

Training delivery methods can be used to enhance the type of data stored for each of your training items. Example delivery methods include: Online, Classroom, Self-Paced, or any another delivery method your organization might use. Using the information grid, you can easily group your training items by delivery method. This can help determine the exact number of training items (by delivery method), or can be used to more quickly find a specific training item.

To manage delivery methods:

1. Select the Training module and then select the Training Item Master view.

2. Select Manage Delivery Methods located on the Training tab.

   The following dialog will be displayed and can be used to Add, Delete, and Rename delivery methods.

3. Make the appropriate additions, changes, or deletions and click Close.
Manage Training Status

The training status is typically used to identify whether or not a particular training item is ‘Active’ or ‘Inactive’. However, you can also add your own statuses and manage training items according to your organizational standards.

To manage the training status:

1. Select the Training module and then select the Training Item Master view.

![Training Module]

2. Select Manage Training Status located on the Training tab.

![Manage Training Status]

The following dialog will be displayed and can be used to Add, Delete, and Rename training item statuses.

3. Make the appropriate additions, changes, or deletions and click Close.
Manage Training Types

Training types are used to classify similar types of training items. Assigning a training type is used to help organize and group similar types of training within your quality system.

To manage training types:

1. Select the † Training module and then select the Training Item Master view.

2. Select Manage Training Types located on the Training tab.

The following dialog will be displayed and can be used to Add, Delete, and Rename training types.

3. Make the appropriate additions, changes, or deletions and click Close.
Set Training Requirements

Training requirements determine which training items employees have a responsibility to complete. The requirements associated with a particular training item are based on an employee, a job description, or a department.

Quality Link provides a very flexible approach for letting you specify these requirements and then analyzing the results. For example, once you set training requirements, you can then dynamically (i.e. automatically and in real-time) determine who still needs to be trained!

The steps below will help you get started with establishing these requirements. Once you are finished, you can navigate to the (Outstanding Requirements) view within the Training module to see which of your employees need to be trained based on your new requirements. Optionally, you can run one of two training requirement reports (Required Training – by Employee) and (Required Training – by Training ID). Both of these are available from within the Reporting module.

To set training requirements:

1. Select the Training module.
2. Select the Training Item Master view.
3. Select the training item you would like to set training requirements for from the Info Grid.
4. Select Set Training Requirements located on the Training tab.
The following training requirement dialog will open.

5. Modify the training requirements by selecting one or more departments, job descriptions, or employees from the lists provided and select OK to apply these requirements.

In the example above, we selected “Management” as a departmental requirement and “Manager” and “Quality Manager” as the job description requirements. This means that any employee assigned to the “Management” department or any employee that has a job title of “Manager” or “Quality Manager” will be flagged as needing training on the selected item.

6. To show the outstanding training requirements (i.e. the employees that still need to have a training session scheduled and/or completed) select the (Outstanding Requirements) view.
Take note of the outstanding requirement for Training ID 6.0 (RESOURCE MANAGEMENT) for Robert Smith (highlighted below).

![Outstanding Requirements Table]

This is a result of Robert meeting both a departmental and job description requirement as his job title is “Manager”, and he is assigned to the “Management” department.

![Employee List Table]

**Add a New Training Session**

Whenever you need to train employees on one or more training items you should create a new training session. You can do this manually by following the steps below; or, you can optionally navigate to the (Outstanding Requirements) view and create a training session from a dynamically generated list of employees that still need to be trained.

To create a new training session:

1. Select the **Training** module and then select the **Training Sessions** view.

![Training Module]

2. Select **New Training Session** from the Training tab.
The following New Training Session properties window will open.

The fields that you should complete when creating new training session are similar to the fields used to complete many of the other events within Quality Link and have the standard Subject, Due Date, Status, Priority, etc… fields.

However, one notable exception is the Session Code field, which is used for backward compatibility (i.e. for previous users of Quality Link 5) or for new users that wish to maintain a unique ID (or Session Code) for their scheduled training.

In addition, you will need to select the Training Items and Employees that will participate in this training session. You can select these entries by clicking the [Edit Items and Attendees…] button. This will open the following dialog from which you can make your selections.
3. Input the new training session data. If you have additional training sessions to schedule, then click the Save & New button.
**Edit or Delete Training Session**

1. Select the **Training** module and then select the **Training Sessions** view.

![Training Sessions View](image)

2. Select the training session you would like to edit (or delete) from the **Info Grid**.

![Info Grid](image)

3. Select **Edit Properties** or **Delete Training Session** located on the Training tab.

![Training Tab](image)

**Email a Training Session**

In some cases, you may want to notify the attendees of an upcoming training session. You can easily accomplish this by generating an email with all of the training details for the scheduled event.

To email training session details:

1. Navigate to the **Training** module and then select the **Training Sessions** view.

![Training Module](image)
2. Select the training session you would like to generate an email for from the **Information Grid**.

![Image of Training Session List]

3. Select **Email Training Session** located on the Training tab.

![Image of Email Training Session]

4. Your default email application will open and a new email will be populated with your training session details. **Note:** The email [To:] field will be populated with the email address entered for each employee.

![Image of Email Template]

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Print Training Session Worksheets

Quality Link provides a convenient way for your organization to keep a hard-copy of the employees in attendance for any given training session. You can use the ‘Training Session Worksheet’ as a means of keeping employee signatures as proof of attendance and/or compliance.

To print a training session worksheet:

1. Navigate to the Training module and then select the Training Sessions view.

2. Select Print Training Session Worksheet located on the Training tab.

Note: You do not have to select the training session from the Information Grid. The ‘Training Session Worksheet’ will print a page for every training session that has been scheduled.

The following Training Session Worksheet will appear. This can be printed and used as a sign-in sheet for the training session. You can select the session date, located on the left-hand navigation tree, to preview/print the worksheet relevant to your scheduled training session.
Mark a Training Session as Complete

This task is the same as the generic ‘Mark as Complete’ task found in the Event Center. As such, it provides a convenient way to simultaneously complete multiple events, or in this case, training sessions.

To automatically mark one or more training sessions as complete:

1. Navigate to the Training module and then select the Training Sessions view.

2. Select the training session(s) you would like to mark as complete from the Info Grid.
3. Select **Mark As Complete** located on the Training tab.

The following **Mark As Complete** window will open.

4. Click **Yes** to mark the selected training session(s) as complete.

   Note: When you mark an event as complete using this task, the Status, Completed On, and Completed By fields will be automatically populated with ‘Completed’, *current_date*, and *current_user*, respectively.

**Set Training Session Recurrence**

To set training session recurrence:

1. Navigate to the **Training** module and then select the **Training Sessions** view.
2. Select a training session from the **Info Grid**.

3. Select **Set Recurrence** located on the Training tab.

The following **Event Recurrence** window will open and can be used to set the Recurrence Pattern.

4. Establish a recurrence schedule and select **OK** to save your changes.

**View Outstanding Training Requirements**

Quality Link provides an easy way for you to see all of your outstanding training requirements (i.e. employees that still need to be trained). The ‘Outstanding Requirements’ view is based solely on information you provide
about your employees, their associated departments, their job description, and the relationships they have to your specified training item requirements. If you populate the specific requirements for each training item, it is easy to see exactly who still needs to be trained.

This is a very powerful feature for ensuring compliance as well as easing the burden when adding new employees. For example, if you were to add a new employee (i.e. John Smith) and assign him to the (Sales) department and the (Manager) job description, then you will automatically see a list of all the required training based on these associations.

To view the outstanding training requirements:

1. Navigate to the Training module and then select the (Outstanding Requirements) view.

   ![Training Module](image)

2. The Info Grid will be populated with a list of all training that must still be completed for each employee. In addition, you will be able to determine why this training is required (i.e. because of a Department, Job Description, or Employee requirement)

   ![Info Grid Example](image)

   You can also easily create and schedule the needed training session by selecting one or more of the outstanding requirements, and then by clicking on the New Training Session task.

   ![New Training Session](image)

   This will open up the new training session dialog with all the training items and employees pre-populated with the selected items.
Module: Suppliers

The Suppliers module is used to track, manage, and maintain your suppliers in addition to any supplier evaluations you may wish to record. Based information, as well as a complete list of contact details, can be maintained for every supplier in your system.

Add a New Supplier

1. Navigate to the Suppliers module and select the Supplier Master view.

2. Select New Supplier located on the Suppliers tab.

3. The following New Supplier Properties window will open.
4. **In the Supplier Name box, enter a name for your supplier.** The name entered here is referenced throughout other areas of Quality Link. For example, when creating faults or corrective actions with a source of “Supplier”, a dropdown list of supplier names is displayed. This list is populated from the suppliers you enter in this module.

5. **Select a Supplier Type from the dropdown.** The supplier type provides a way to classify your suppliers. Example supplier types include: Raw Materials, Repairs and Maintenance, or any other ‘type’ you may want to add. Supplier types are customizable so you can add, edit, and delete types that fit your unique needs.

6. **Select an Approved By name from the dropdown.** The approved by field is informational only and lets you maintain approval details for each supplier. The list is automatically populated from employees entered into your quality system; however, this is a free form field and you can enter any information into this field.

7. **Select an Approved On date.** The approved on date lets you record when the approval took place. You can select a date from the dropdown or you can enter the date manually.

8. **Select a Status for this supplier.** For new suppliers, the status will default to “Active”. However, you can modify the status to “Inactive” or “Suspended” as needed. Optionally, you can add additional statuses by selecting “Manage Supplier Status” from the “Manage” section located on the Suppliers tab for this module.

9. **In the Reference # box, enter a distinguishing id for your supplier.** The reference number is for informational purposes only and is generally used to track something other than the supplier name in order to uniquely identify the supplier.
10. Select a **Probation Date** date (optional). The probation date is automatically filled in when the status is set to “On Probation”. Once the status is changed back to “Active” or some other non-probationary status the probation date will be cleared.

11. In the **Address, City, State/Province, Zip/Postal Code, Business, and Business Fax** boxes, enter the respective data. The text contained in these fields is informational only.

12. In the **Email** and **Web Address** boxes, enter the respective data. The email address entered here populates the [To:] line of an email after selecting “Email” located on the Suppliers tab for this module.

13. Select **Save & Close** when finished.

### Edit or Delete a Supplier

1. Navigate to the **Suppliers** module and select the **Supplier Master** view.

2. Select the supplier you would like to edit (or delete) from the **Info Grid**.

3. Select **Edit Supplier** or **Delete Supplier** located on the Suppliers tab.
Manage Supplier Types

Supplier types are used to classify your suppliers. Using the information grid, you can easily group your suppliers by type, which can help determine the exact number of suppliers (by type), or can be used to more quickly find a specific supplier.

To manage supplier types:

1. Navigate to the Suppliers module and select the Supplier Master view.

2. Select Manage Supplier Types located on the Suppliers tab.

The following dialog will be displayed and can be used to Add, Delete, and Rename supplier types.

3. Make the appropriate additions, changes, or deletions and click Close.
Manage Supplier Status

The supplier status is used to identify whether or not a supplier is ‘Active’, ‘Inactive’, ‘On Probation’, or ‘Suspended’. However, you can also add your own statuses and manage suppliers according to your organizational standards.

To manage the supplier status:

1. Navigate to the Suppliers module and select the Supplier Master view.

2. Select Manage Supplier Status located on the Suppliers tab.

The following dialog will be displayed and can be used to Add, Delete, and Rename supplier statuses.

3. Make the appropriate additions, changes, or deletions and click Close.
Manage Contact Information

It is quite common for you to have one or more contacts at a given supplier. If this is the case, you can use the Contact Information dialog to keep track of all your contact detail for each one of your suppliers.

To manage the supplier contact information:

1. Navigate to the Suppliers module and select the Supplier Master view.

2. Select the supplier you would like to modify the contact information for from the Information Grid.

3. Select Contact Information from the Suppliers tab.

The following dialog will be displayed and can be used to Add, Delete, and Rename all of your contacts for the selected supplier.
Supplier Rating Options

Supplier rating options determine how you calculate a supplier rating for your organization. Quality Link provides various options for configuring a supplier rating, each of which is dynamically calculated and loaded into your supplier view. Therefore, it is very easy to see the effect various rating configurations may have on your suppliers.

To specify the supplier rating configuration:

1. Navigate to the Suppliers module and select the Supplier Master view.

2. Select Supplier Rating Options located on the Suppliers tab.
Place a Supplier on Probation

Using the ‘Place on Probation’ task you can very easily place a supplier on probation. Alternatively, you can elect to edit the supplier and modify the status appropriately. However, this task provides a one-step process for putting a supplier on probation.

Placing a supplier on probation will not affect how Quality Link processes supplier evaluations and/or supplier ratings (i.e. you can still perform supplier evaluations and calculate the supplier ratings for suppliers on probation).

To place a supplier on probation:

1. Navigate to the Suppliers module and select the Supplier Master view.
2. Select the supplier you would like to place on probation from the **Info Grid**.

3. Select **Place on Probation** from the Suppliers tab.

   The following dialog will be displayed indicating the supplier is now marked as ‘On Probation’.

   ![Placed On Probation](image)

   **Placed On Probation**

   The selected supplier was placed on probation.

   ![OK Button](image)

   **OK**

   Note: Should you need to remove a supplier from probation, you will have to edit the supplier properties and change the status back to ‘Active’.
Approve a Supplier

To quickly add a supplier to your ‘Approved Suppliers List’ you can execute the ‘Approve Supplier’ task. This task will automatically set the Approved On date to the current date, and set the Approved By field to that of the currently logged in user. You can view your Approved Supplier List report from within the Reporting module.

Alternatively, you can elect to edit the supplier and manually set the approved on date and approved by field to a value of your choosing.

To approve a supplier:

1. Navigate to the **Suppliers** module and select the **Supplier Master** view.

2. Select the supplier you would like to approve from the **Info Grid**.

3. Select **Approve Supplier** from the Suppliers tab.

The following dialog will be displayed:
Select **Yes** to approve the selected suppliers. This action will automatically set the [Approved By] date to today’s date and set the [Approved By] name to the currently logged in user.

**Add a New Supplier Evaluation**

The Suppliers module can also be used to maintain all of your supplier evaluations. These evaluations can contain individual supplier ratings, notes related to the evaluation, and any related documents that may also pertain to this supplier.

To add new supplier evaluation:

1. Navigate to the **Suppliers** module and select the **Supplier Evaluations** view.

2. Select **New Supplier Evaluation** located on the Suppliers tab.

The following new supplier evaluation properties window will open.
3. Select a supplier from the dropdown and enter your new supplier evaluation data. Use the notes section at the bottom of the dialog and/or the **Custom Fields** section to input additional data. If you have additional supplier evaluations to enter, then click the **Save & New** button.
Edit or Delete a Supplier Evaluation

Once you have scheduled your supplier evaluation you may later realize that you need to update this information, or completely remove it from your system. You can edit and/or delete your existing supplier evaluations by using features available in the Supplier Evaluations view.

To edit (or delete) supplier evaluations:

1. Navigate to the Suppliers module and select the Supplier Evaluations view.

2. Select the supplier evaluation you would like to edit (or delete) from the Info Grid.

3. Select Edit Supplier Evaluation or Delete Supplier Evaluation pending your desired action.
Set Supplier Evaluation Recurrence

To establish a frequency and/or recurrence for your supplier evaluations:

1. Navigate to the Suppliers module and select the Supplier Evaluations view.

2. Select the Supplier Evaluation you would like to schedule a recurrence for from the Info Grid.

3. Select Set Recurrence located on the Suppliers tab.

The following Event Recurrence window will open and can be used to set the recurrence pattern for the selected event.
4. Establish a recurrence schedule and select **OK** to save your changes.
Module: Shortcuts

In addition to the many modules and views available within Quality Link, we also know that there may be additional applications used within your organization to help you manage your overall quality system. To assist in the integration between Quality Link and other applications, you can create and utilize ‘shortcuts’ directly from within Quality Link.

Shortcuts provide a way for you to create a direct link to an external application from within Quality Link.

Add a New Shortcut

1. Navigate to the Shortcuts module and select the Shortcuts view.

2. Select New Shortcut action on the Shortcuts tab.

The following New Shortcut properties window will open.
3. Enter the **Shortcut Name** and then click **Browse** to locate the external file you wish to associate with this shortcut. If you have additional shortcuts to enter, click the **Save & New** button.
Edit or Delete a Shortcut

1. Navigate to the **Shortcuts** module and select the **Shortcuts** view.

2. Select the shortcut you would like to edit from the **Information Grid**

3. Select **Edit Properties** or **Delete Shortcut** located on the Shortcuts tab.

Open Shortcut

To open a shortcut and execute the application associated with it:

1. Navigate to the **Shortcuts** module and select the **Shortcuts** view.

2. Select the shortcut you would like to open from the **Information Grid**
3. Select **Open Shortcut** located on the Shortcuts tab.

This will open the file associated to this shortcut. You will be redirected from the Quality Link application to the selected shortcut application. You can return to Quality Link by closing the shortcut application and/or navigating away from this by switching windows, which is a common task in the Windows operating system environment.