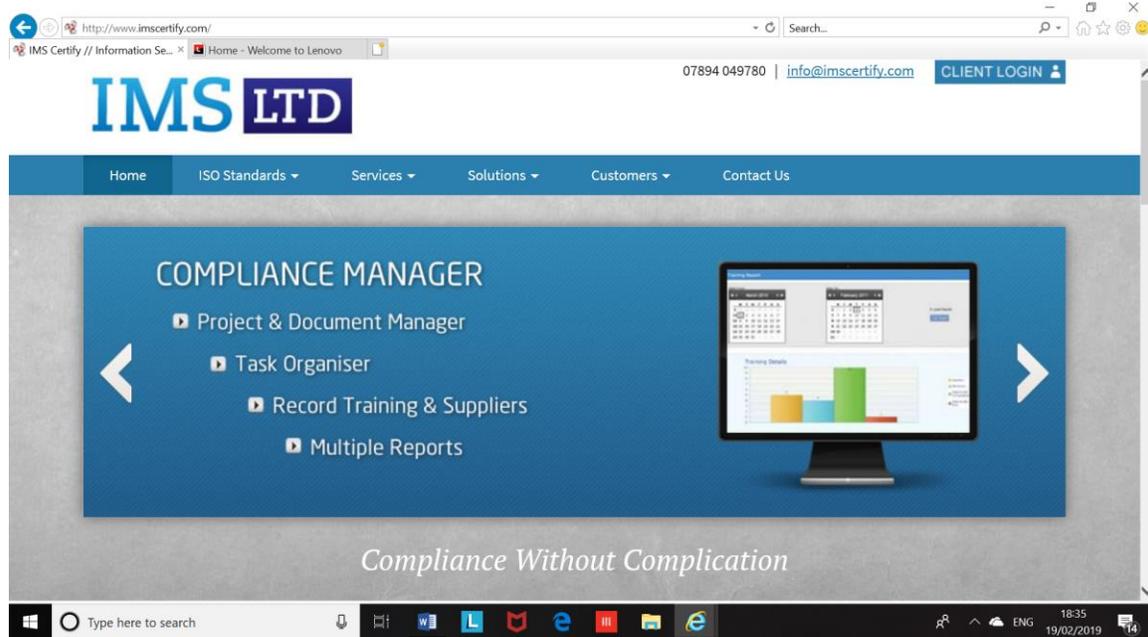**IMS LTD**

Welcome to the Compliance Manager User Guide. This document will guide you through each screen of the system and provide prompts for ease of use.
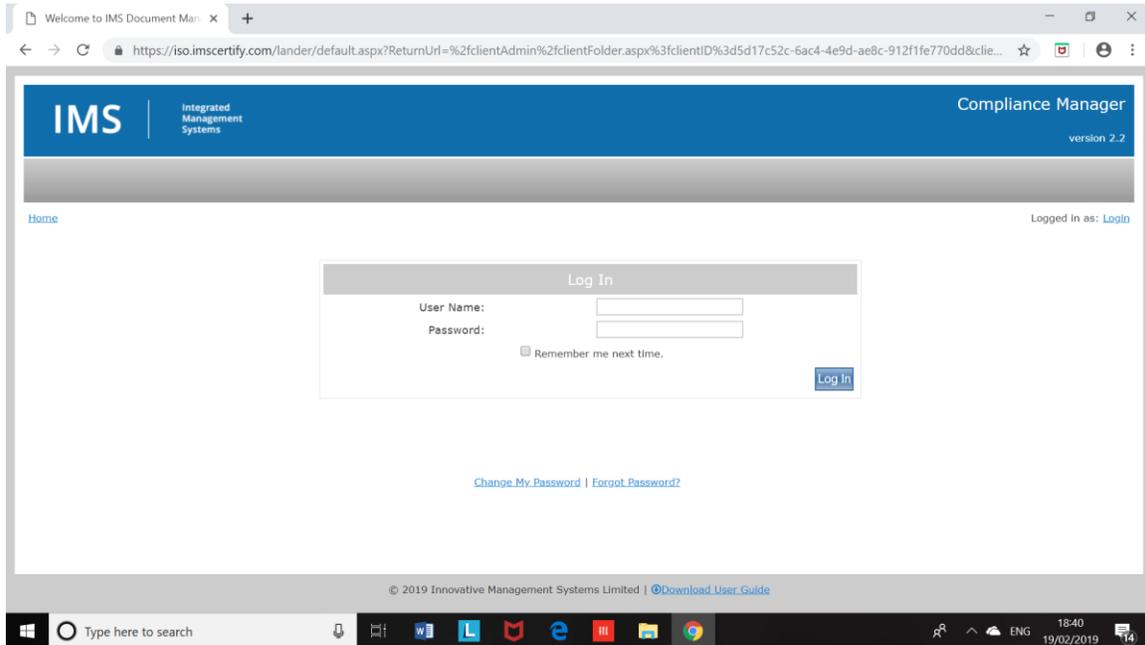

The following pages will take the user through guidance on:

1.0   LOG IN

The screen below will appear. Type in your user name (make this your e mail address) and allocated password. "Change My Password" allows'
 you to change passwords. "Forgot My Password" prompts an e mail remainder.
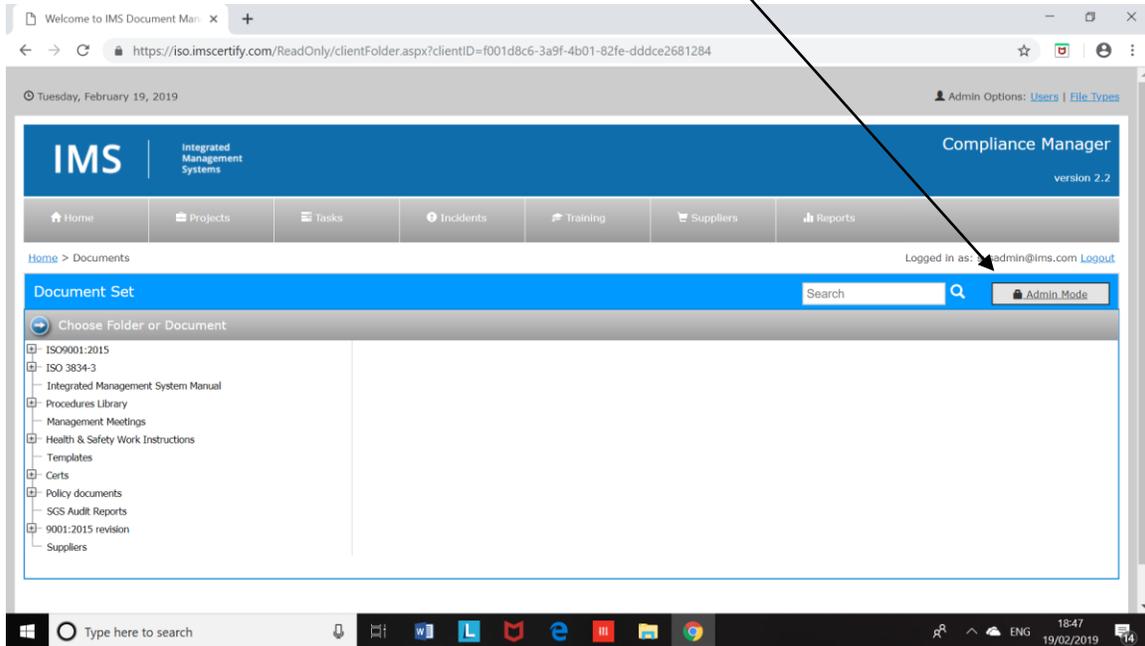

2.0   HOME

This view will display the Policies, Procedures and Forms that the users can access in a Read Only format. Users cannot add, delete or archive documents.
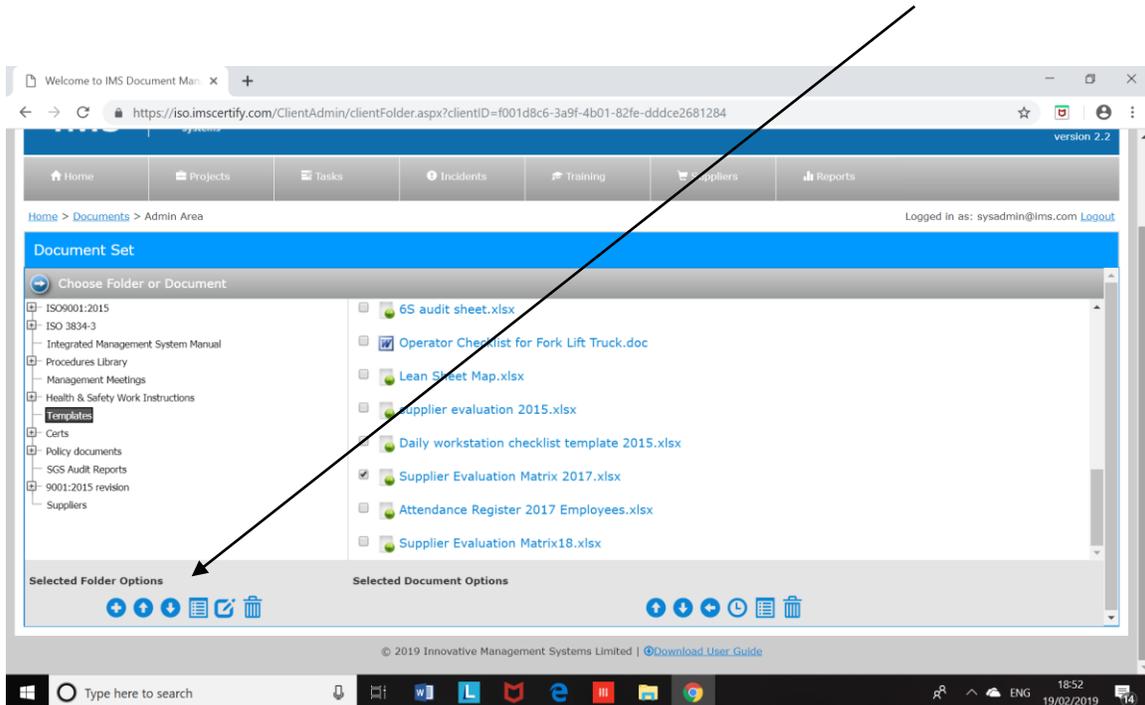
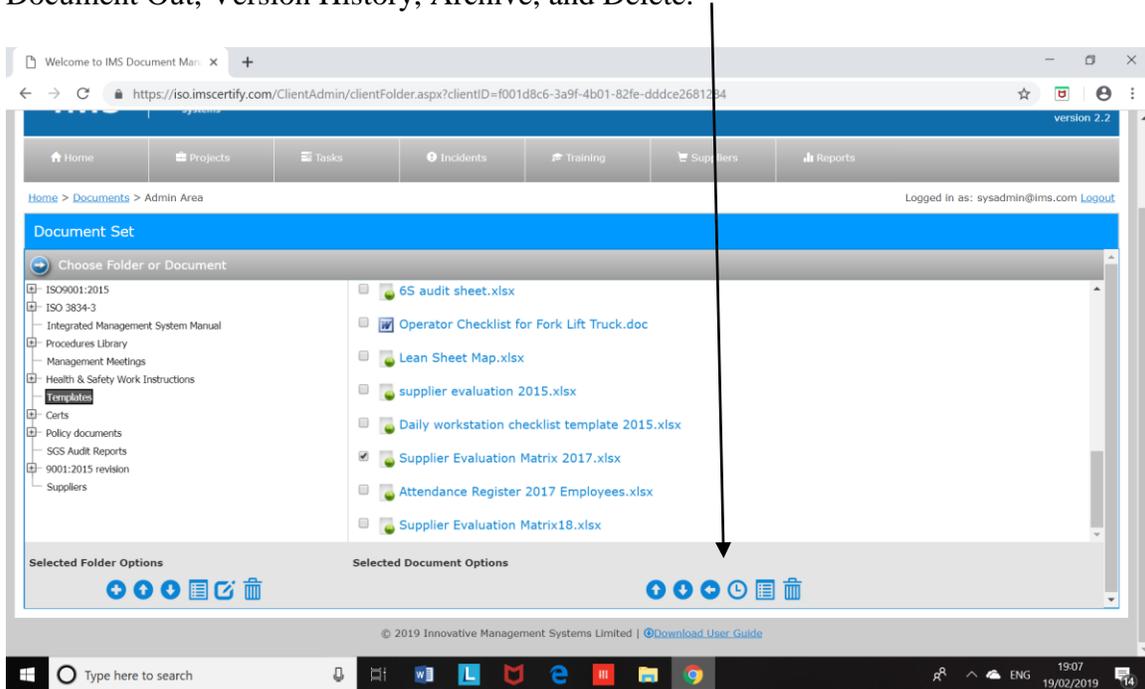## IMS LTD
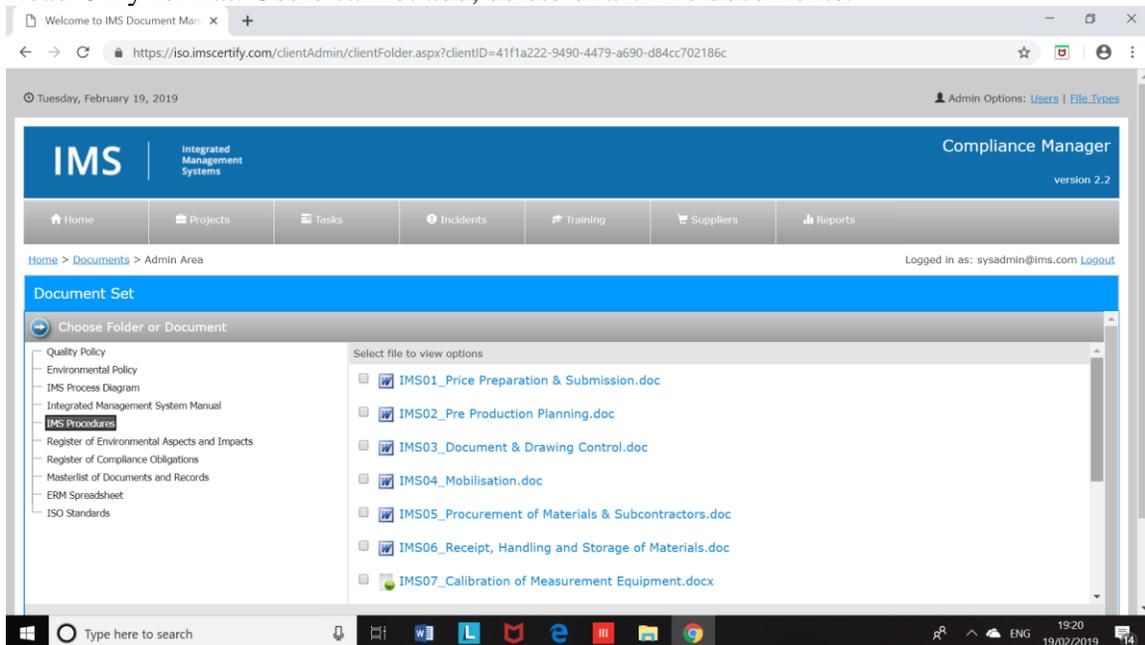
3.0   ADMIN MODE

This mode is only available to the Client Administrator.

When you hit Admin Mode the screen below appears. Admin mode allows the user to Add Folder, Move Folders Up and Down, View Archive, Edit, Delete.

Admin mode allows the user to Add Document, Move Documents Up and Down, Check Document Out, Version History, Archive, and Delete.


Add Document

This facility allows the Client Administrator to add documents and check them out/in for editing. When you add a document or update a document every user gets an automated e mail. This helps with awareness and training on Policies & Procedures.
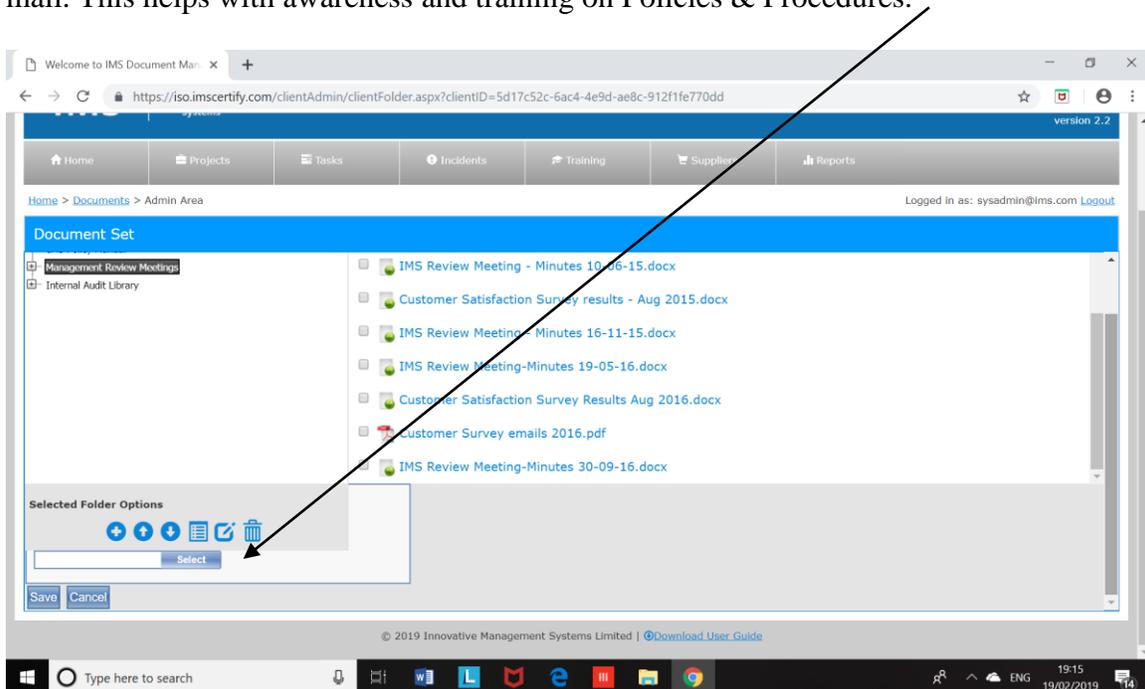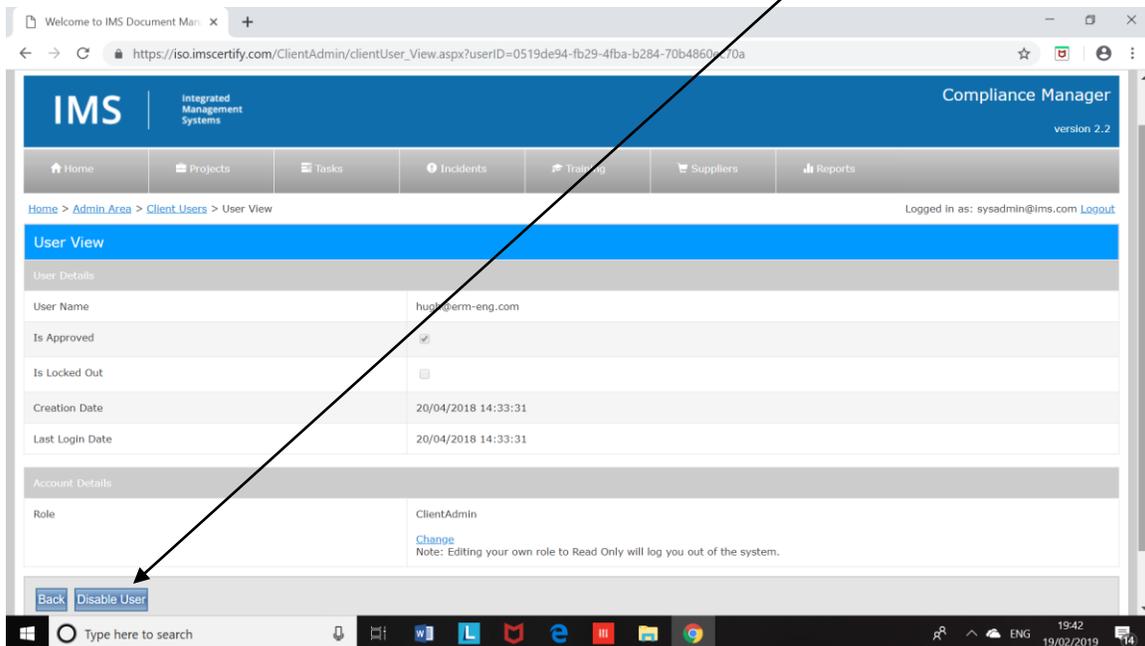
Edit Users

This option allows the Client Administrator to add Users to the system, creating a User Name and Password.
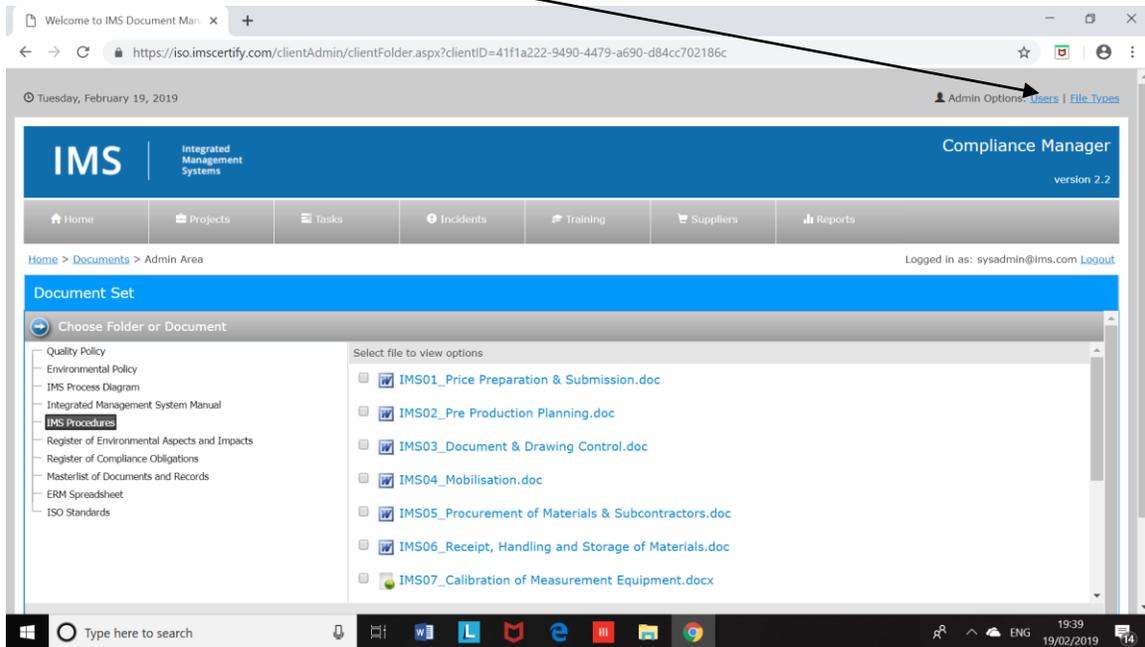
When you click on a User Name the screen below appears. The Client Administrator can also Disable Users who no longer require access to the system.

You can give a user full Admin rights, Read Only, or No Access to each area, Home, Projects, Tasks, Incidents, Training, Suppliers, Reports.
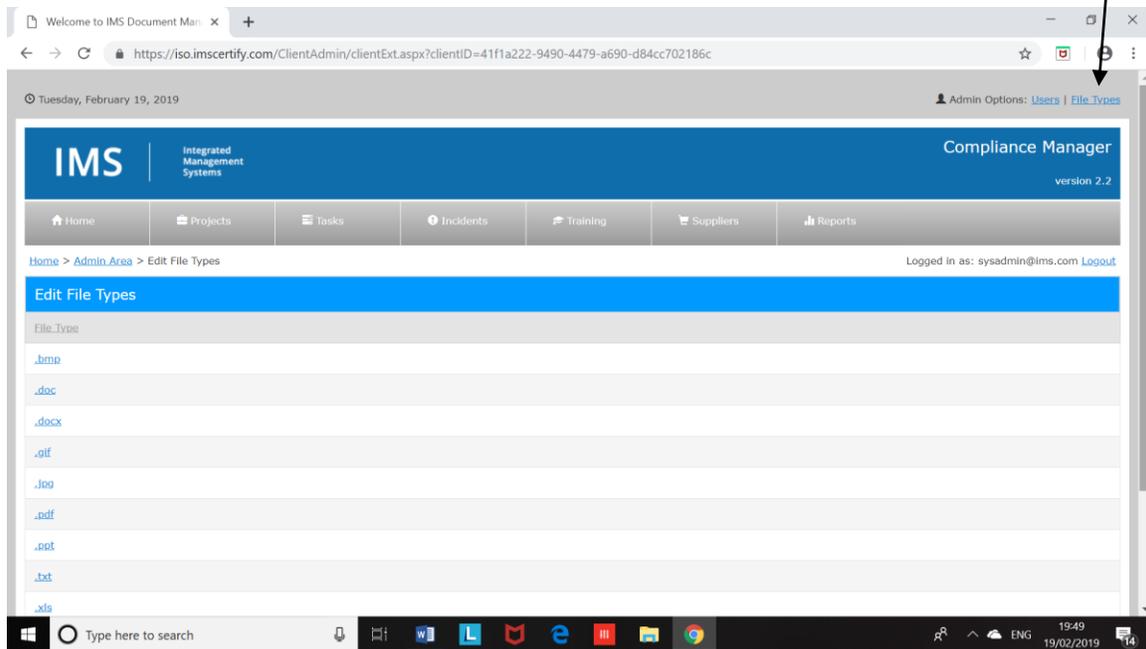

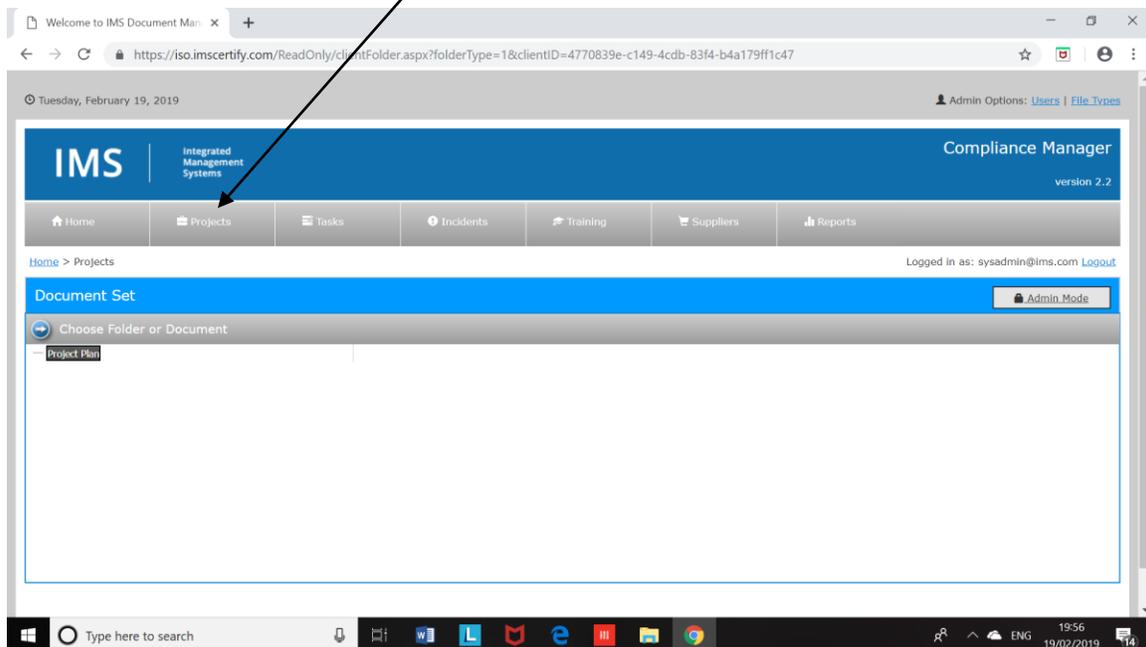You can hide Users who have left the Company

File Types

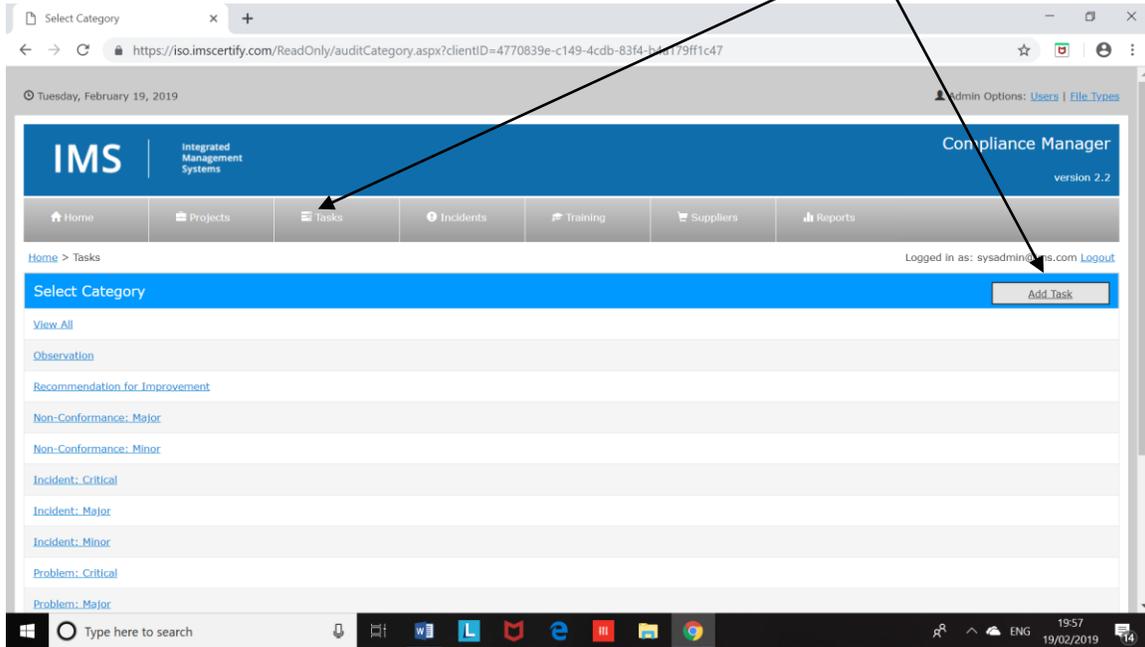This allows the Client Administrator to add file types to the system, for example .pdf.

4.0   PROJECTS

The Projects option allows users to share project information with colleagues in other locations, e.g., site-based staff.
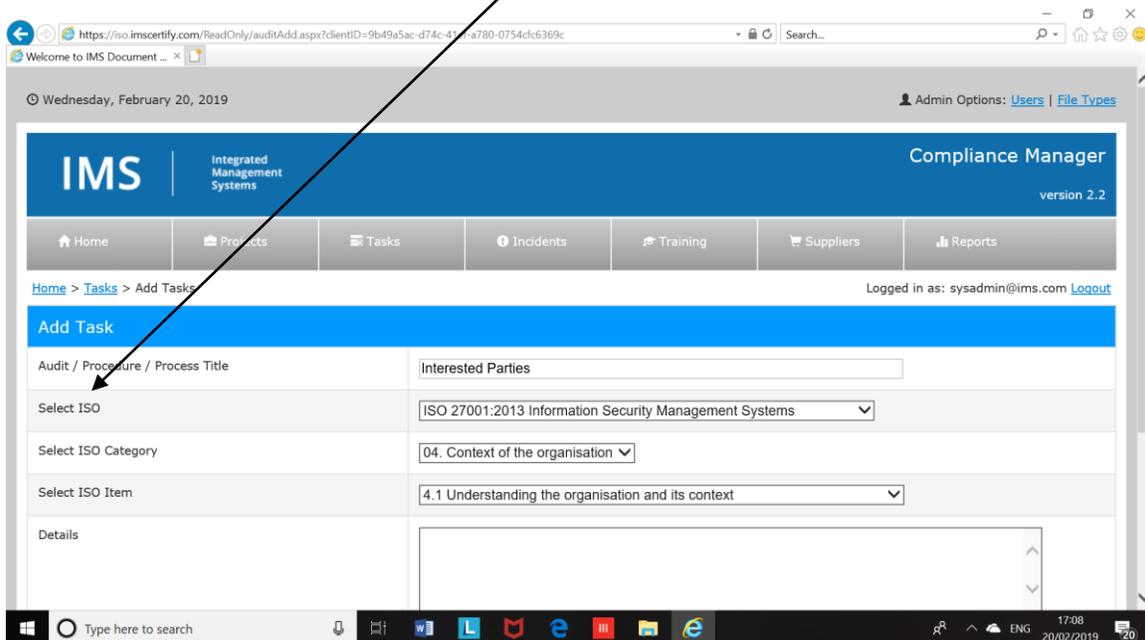
5.0   TASKS

The Tasks option is available to both the Client Administrator and the Read Only User. The Task List allows a task to be added. Tasks can also be deleted.

Choose ISO Standard
This allows the Client Administrator and Read Only User to choose which ISO standard to audit, the ISO Category, and ISO Item.

Corrective/Preventive Action

This option allows the Client Administrator and Read Only User to add a Corrective/Preventive Action and a Due By Date for completion. Users can also add an Alert to be sent to the auditee.

When the Corrective/Preventative Action is due the user completes the screen below. Supporting documents can also be added.

Root Cause Analysis

This screen allows the Client Administrator or Read Only User to allocate a Root Cause Analysis reason to the task using a drop down menu. An "Other Reason" option is also available. The Task screens can be amended at any time by clicking on the "Edit" option.
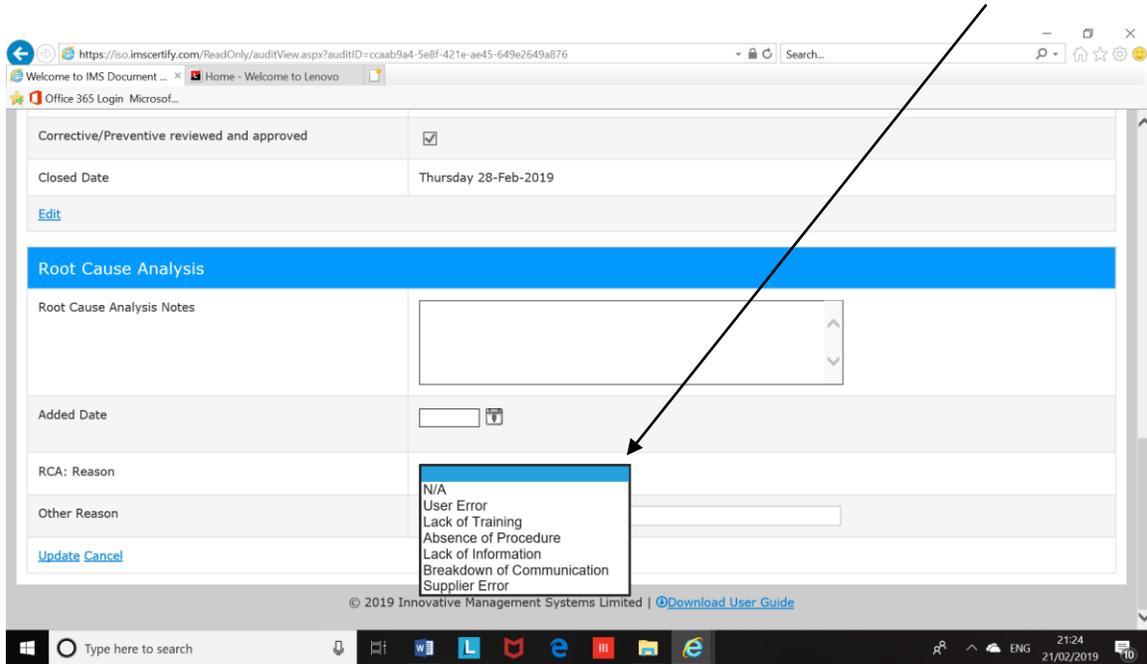
6.0   INCIDENTS

This option allows the user to add incident reports.
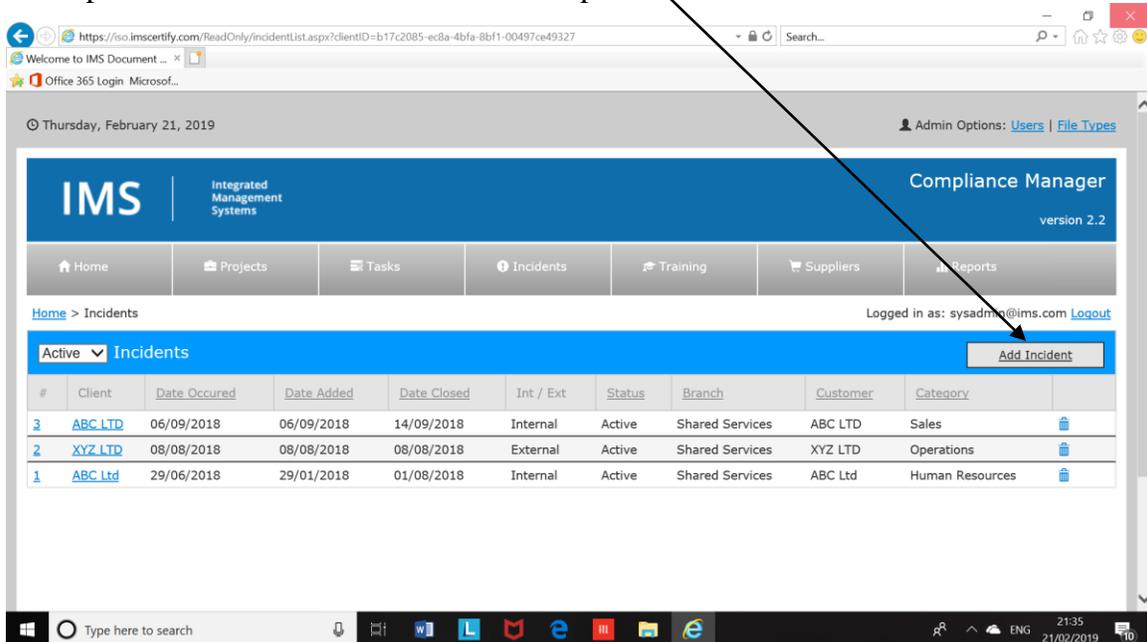
7.0   TRAINING

The Training option allows an Employee to be added. Employee details can also be deleted.

Add Employee

This allows the user to add an employee record.

Add Training Courses, Appraisals, and Employee Termination

This allows the user to add details of training courses attended, appraisals held, and employee termination. Alerts can be set to prompt subsequent appraisals.
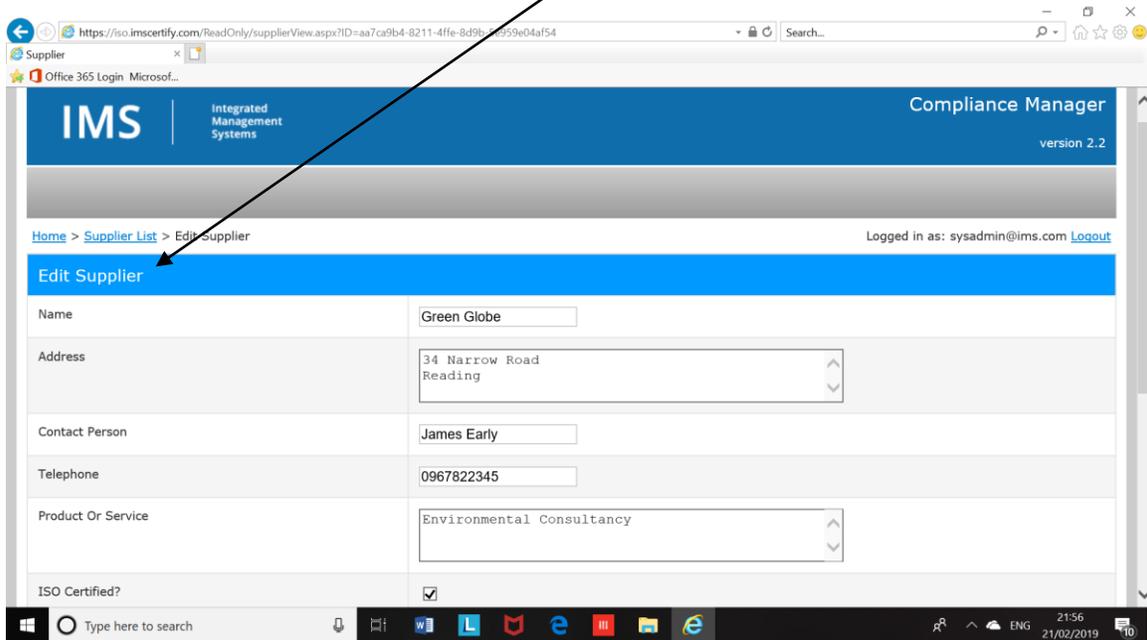

8.0   SUPPLIERS

The Supplier option allows the User to produce an Approved Supplier List. Supplier details can also be deleted.
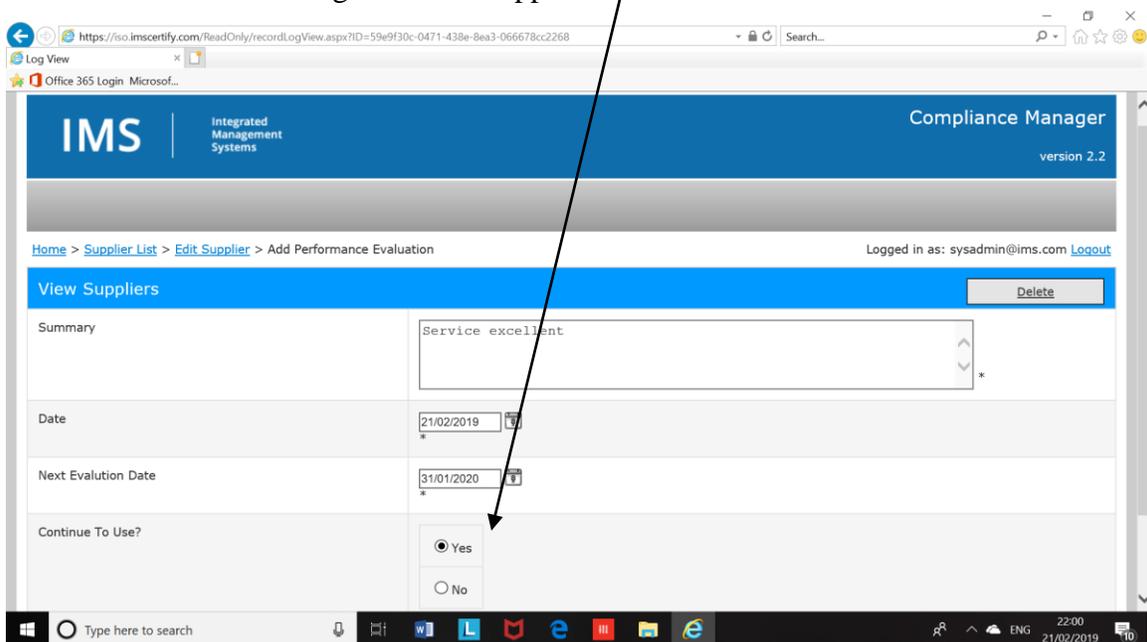
Add Supplier

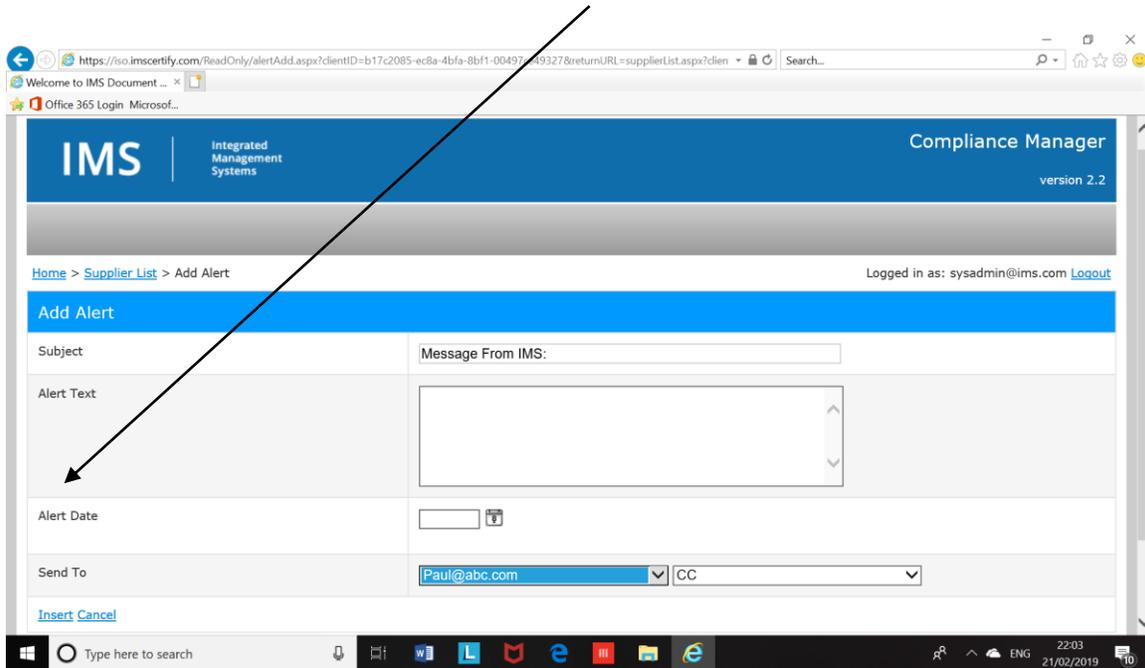This allows the User to add a supplier record.

Add Performance Evaluation

This allows the User to add a performance evaluation record for the supplier. A decision can be made on continuing to use the supplier.

Add Alert

This option allows the User add an alert and a date. This will allow an e mail alert to be sent when the next supplier evaluation is due.
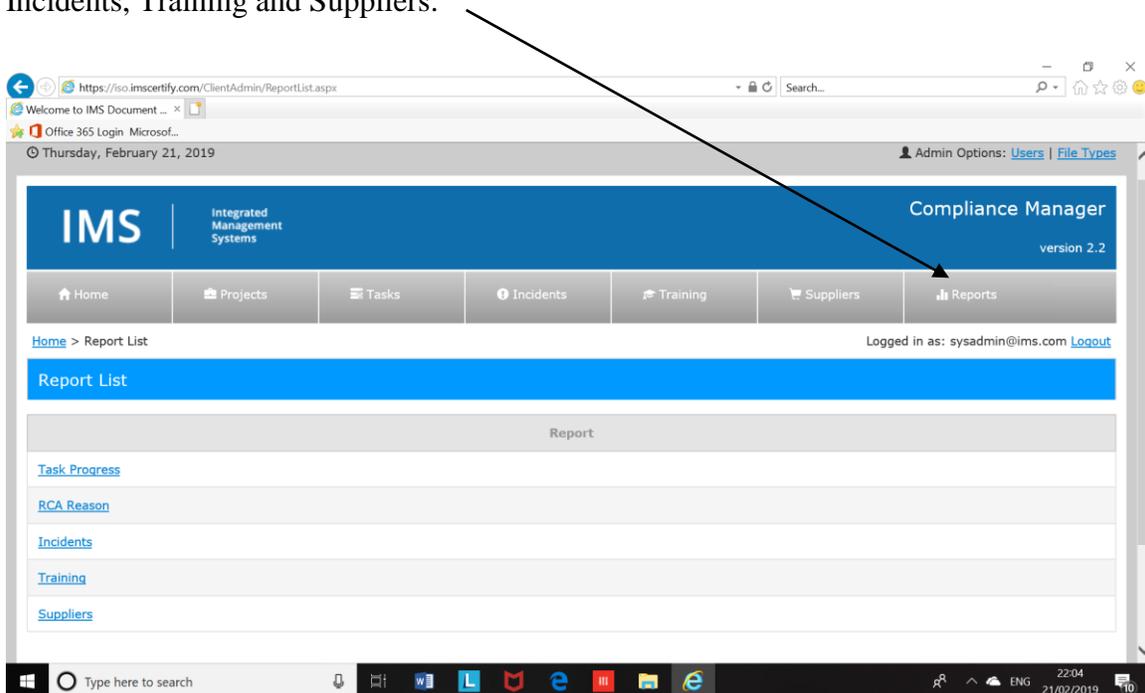

9.0   REPORTS

The Reports option allows the User to generate five reports, Task Progress, RCA Reason, Incidents, Training and Suppliers.

For example choose a report for Training below, select a date from and to then click the Load Report button.

A report in the form of a bar chart will appear as in the screen below.

10.0 Logout

Click on the "Logout" option on the top right of the screen.