



process improving performance

Version 2010.1.3 Release Notes

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The upgrade for 2010.1.3 includes updates to:

- Internal Audit Module
- Document Training Module
- Improvement System Module

Internal Audit Module Updates

Internal Audit Home Page Update

The Internal Audit Module Home Page has been updated with an AJAX applet. The AJAX applet is more and efficient, user friendly and provides users with filters that can be used to locate internal audits.

Audit Information

My Role:

Status:

Audit Template:

Other Filters:

My Role: Audits I need to work on

Status: All Open Audits

Issue Type: All Templates

Other Filters:

	Audit Name	ID	Lead Auditor	My Role	Status	Actual Start Date	Due Date
✓	MT Test Audit - 06/01/09	55	Rick Caswell	Auditor	Planned	06/01/2009	09/01/2009
✓	MT Test Audit - 06/01/09	56	Matt Tholey	Lead Auditor	Scheduled	06/01/2009	
✓	MT Test Audit - 07/29/09	57	Matt Tholey	Lead Auditor	Scheduled	07/29/2009	
✓	test new audit group - 08/31/09	59	Matt Tholey	Lead Auditor	Scheduled	08/31/2009	
✓	sadfasdf - 08/31/09	60	Matt Tholey	Lead Auditor	Planned	08/31/2009	12/15/2009
✓	sadfasdf - 08/31/09	61	Matt Tholey	Lead Auditor	Planned	08/31/2009	12/15/2009
✓	sadfasdf - 08/31/09	62	Matt Tholey	Lead Auditor	Planned	08/31/2009	12/15/2009
	sadfasdf - 08/31/09	63	Matt Tholey	Lead Auditor	Planned	08/31/2009	12/15/2009
✓	sadfasdf - 08/31/09	64	Matt Tholey	Lead Auditor	Scheduled	08/31/2009	
✓	sadfasdf - 08/31/09	65	Matt Tholey	Lead Auditor	Planned	08/31/2009	12/15/2009
✓	sdfsdafasdfsdfsd - 08/31/09	66	Matt Tholey	Lead Auditor	Planned	08/31/2009	12/15/2009
✓	sdfsdafasdfsdfsd - 08/31/09	67	Matt Tholey	Audit Administrator	Conducted	08/31/2009	12/15/2009
✓	new test audit unscheduled - 08/31/09	68	Matt Tholey	Lead Auditor	Scheduled	08/31/2009	
✓	Test Audit Admin Issue - 09/02/09	71	Matt Tholey	Lead Auditor	Scheduled	09/02/2009	
✓	New Audit - 12/14/09	72	Matt Tholey	Lead Auditor	Planned	12/14/2009	12/15/2009

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The My Role filter gives users the ability to filter audits by Auditor, Group Administrator, Lead Auditor and Audit Contact. This filter gives users the ability to search current audits, past audits (Audits I participated in) and deleted audits.

My Role:

Audits I need to work on

ones I'm 'Auditor'

ones I'm 'Audit Administrator'

ones I'm 'Lead Auditor'

Audits I am the contact for

Audits I participated in

ones I'm 'Auditor'

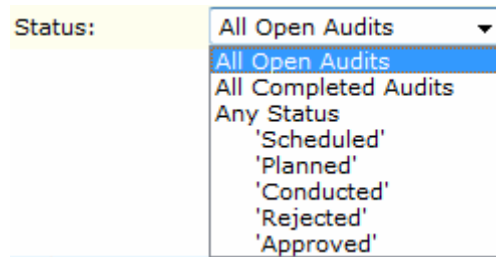
ones I'm 'Audit Administrator'

ones I'm 'Audit Contact'

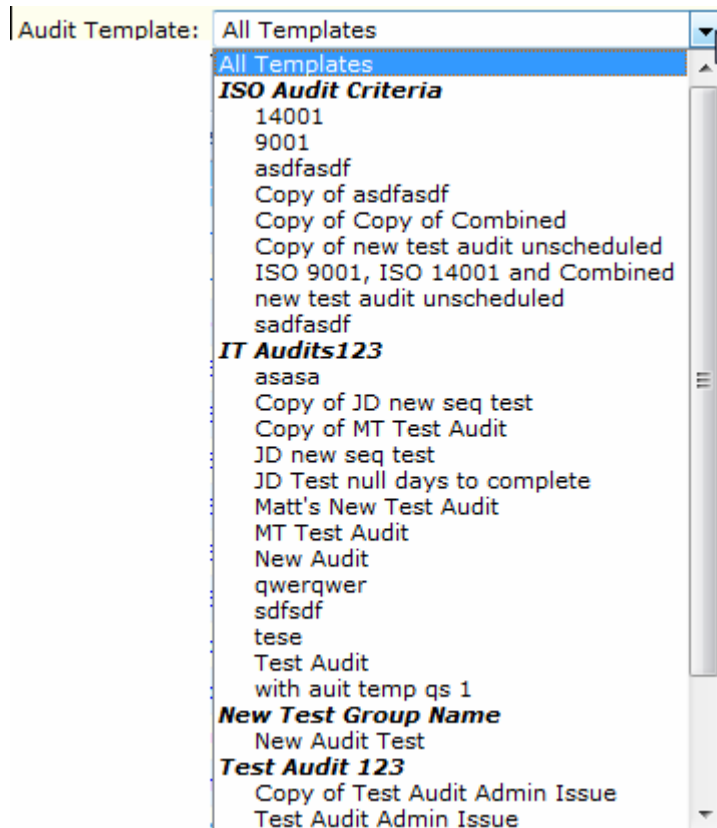
ones I'm 'Lead Auditor'

Deleted Audits

The Status filter gives users the ability to filter audits by status. Open, Completed and individual statuses can be filtered.



The Audit Template Filter gives users the ability to filter audits by audit template. The drop down is categorized by Audit Group with the audit template names as the selections.



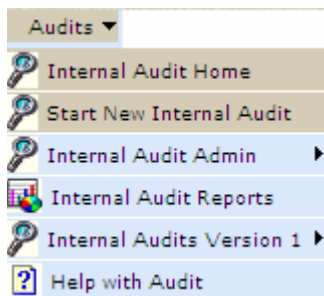
Other filters can be applied when trying to locate Internal Audits on a user's home page.



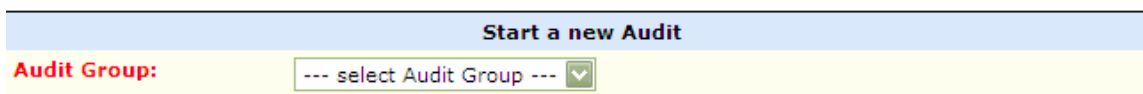
Starting Internal Audits Immediately Modification

Internal audits can be started immediately from the Internal Audit Home Page or from the Audits menu. Audits that need to be sent to the auditors' home pages immediately will now have to be started from the home page or the audit Menu and not the audit template page. Internal Audit Administrators as well as Group Administrators have access to start audits immediately from the Internal Audit Home Page.

To start an audit immediately from the Audits menu



Once the Start New Internal Audit menu option has been selected a pop up will display. Users will be prompted to select an Audit Group from the drop down menu.



Once a group has been selected the Group Administrators and or Internal Audit team members will be prompted to select an internal audit template.

Start a new Audit

Audit Group: ISO Test Audit Group

Audit Template: --- select Audit Template ---
 --- select Audit Template ---
 ISO Quality Manual Audit and Custom Audit Set

Select an Internal Audit Template and click Submit. A confirmation will display with the Audit ID.



To start audits from the home page



Click the Start Audit button on the Internal Audit home page.

Audit Information

My Role: Audits I need to work on

Status: All Open Audits

Audit Template: All Templates

Other Filters:

My Role: Audits I need to work on
Status: All Open Audits
Issue Type: All Templates
Other Filters:

Users will be prompted to select an Audit Group from the drop down menu.

Start a new Audit

Audit Group: --- select Audit Group ---

Once a group has been selected the Group Administrators and or Internal Audit team members will be prompted to select an internal audit template.

Start a new Audit

Audit Group: ISO Test Audit Group

Audit Template: --- select Audit Template ---
 --- select Audit Template ---
 ISO Quality Manual Audit and Custom Audit Set

Select an Internal Audit Template and click Submit. A confirmation will display with the Audit ID.





Audit Template Question Customization

Group Administrators as well as Internal Audit Admin team members have the ability to build audit templates that includes question customization. Typically the questions for an internal audit are pulled from Sets and Requirements. This rule still applies, however questions can be customized at the audit template level under Group Administration.

After adding scope to an audit template and completing the template information the user will be prompted to select and or click the Continue button.

[Open All] [Close All] **Audit Scope**

Name	Rev	Status	Type	Uploaded	i	e
 Joliet						
 This is a new test audit set						

Once the Continue button has been selected users will have the ability to select and customize the questions contained in the audit template.

ACTIVE Audit Template Questions			
Question	Data Type	Comments	Status
1. ggg	Date	No Comments	Active, Required
2. add another question?	Drop Down (Yes/No)	No Comments	Active, Required
3. Set: Joliet, Req: 4.2: Test DDYN	Drop Down (Yes/No)	No Comments	Active, Optional
4. Set: Joliet, Req: 4.2: Test CBMS	Check Box (Multi Select)	No Comments	Active, Optional
5. Set: This is a new test audit set, Req: 1: Requirement Test 1 This is a required question at the audit set and requirement level. (required comments)	Radio Button (Yes/No)	Required Comments	Active, Required
6. Set: This is a new test audit set, Req: 1: Requirement Test 1 This is an optional question at the audit set and requirement level. (optional comments)	Radio Button (Yes/No)	Optional Comments	Active, Optional
7. test this out?	Radio Button (Yes/No)	No Comments	Active, Required

Continue Add another question

INACTIVE Audit Template Questions			
Question	Data Type	Comments	Status
1. Set: This is a new test audit set, Req: 1: Requirement Test 1 Does this disabled question show up on the audit template and audit instance? (no comments)	Radio Button (Yes/No)	No Comments	Inactive

There may be two sections of questions that appear in an audit template. Active questions are questions that have been pulled from the sets and requirements and are listed as either required or optional. Inactive questions are questions that have been pulled from an audit requirement as disabled or have been marked as inactive at the template level.

If questions/comments are listed as required at the Sets and Requirements level, they will be required in the template as well as the audit instance. Required questions cannot be edited.

5. Set: This is a new test audit set, Req: 1: Requirement Test 1 This is a required question at the audit set and requirement level. (required comments)	Radio Button (Yes/No)	Required Comments	Active, Required
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If questions/comments are listed as optional at the Sets and Requirements level, they will be listed as optional in the template as well as the audit instance. They can be set as inactive, required and or optional at the template and instance level. Optional questions can be edited.

6. Set: This is a new test audit set, Req: 1: Requirement Test 1

This is an optional question at the audit set and requirement level. (optional comments)

Radio Button (Yes/No) Optional Comments Active, Optional

If questions/comments are listed as disabled at the Sets and Requirements level, they will be listed in the Inactive section of the audit template. Disabled questions can be set as active (optional or required) at the template or remain inactive/disabled. Inactive questions will not appear in an audit instance.

1. Set: This is a new test audit set, Req: 1: Requirement Test 1

Does this disabled question show up on the audit template and audit instance? (no comments)

Radio Button (Yes/No) No Comments Inactive

To add a question to an audit template, click the Add another question button. To sequence the question in the audit template, click the Continue button.

Sort Audit Template Questions

1. ggg
 2. add another question?
 3. DDYN
 4. CBMS
 5. This is a required question at the audit set and requirement level. (required comments)
 6. This is an optional question at the audit set and requirement level. (optional comments)
 7. test this out?

↑
↓

Submit

Audit Template – Group Administration Options

Internal Audit Templates can be copied, edited and deleted right from the Group Administration page.

Group Administration and Audit Template Maintenance

Please Select an Audit Group: test2 - test2

F - Frequency Number, A - Auto Reschedule

Rows per page

Name	F	Frequency Type	A	Next Creation Date	Next Due Date
Hello World	1	Unscheduled	N		
Small Audit Template	1	Unscheduled	N		
test Brand New Audit Template	1	Unscheduled	N	03/28/2019	03/31/2019

Page 1 of 1 [Edit Audit Template](#) [Copy Audit Template](#) [Delete Audit Template](#) Displaying records 1 - 3 of 3

Document Training Updates

Document Information/Edit Training Display Update

The Document Information and Edit screen has been updated. Training roster information is now separated into Users and Contacts.

Document Training:	Users requiring Training: 3
	Contacts requiring Training: 4

Click the appropriate hyperlink to access the user/contact training roster.

Document Training Roster User Screen Update

The user training roster page has been updated to include a Facility drop down. The Facility of the user logged into the project displays by default.

Users that require Training				
Facility to display: Prism, King of Prussia PA				
Showing User Trainees 4 of 6				
Name	Due Date	Date Trained	Training Time(HH:MM)	Trained by
1) Habermann, Gary	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>
2) Mitman, Chuck	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>
3) Reeve, Mike	03/18/2010	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>
4) Tholey, Matt	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>

[Add User](#) [Remove User](#) [Add User](#) [Remove User](#) [Add User](#) [Remove User](#) [Add User](#) [Remove User](#)

Add/Remove User(s) From Training Roster

To switch to another facility click the Facility drop down menu.

Showing User Trainees 2 of 6				
Name	Due Date	Date Trained	Training Time(HH:MM)	Trained by
1) Bates, Jeannette	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>
2) User3, New	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>

[Add User](#) [Remove User](#)

[Add User](#) [Remove User](#)

Add User to Training Roster Update

The training roster user list has been updated. A new user selection list has been added to the user selection page to make it more efficient as well as easier to access.

Users that require Training

Available Users	Selected Users
<input type="text" value="Prism, King of Prussia PA"/> Grier, Pete testsupport, test user, test Walsh, John	Bates, Jeannette Habermann, Gary Mitman, Chuck Reeve, Mike Tholey, Matt User3, New

Filter Users by:
[Team](#)
[Department / Job Title](#)

Training Roster and Matrix Updates

Both of these menu options have been updated to include the new user selector list.

Select User:

Available Users

Prism, King of Prussia PA ▼

Grier, Pete
 Habermann, Gary
 Mitman, Chuck
 Reeve, Mike
 testsupport, test
 user, test
 Walsh, John

Selected Users

Tholey, Matt

➡
⬅

Filter Users by:
[Team](#)
[Department / Job Title](#)

The Facility of the user logged into the project will display by default. Other facility user lists can be accessed by adjusting the drop down menu below the Available Users header.

Available Users

Prism, King of Prussia PA ▼

Improvement System Updates

A Last Updated date column has been added to the Improvement System Report.

Corrective Action																
Type Name	Total Number	Number Open	Average Duration (In Days)	Number On Time	Number Late											
Corrective Action	1	1	0.00	1	0											
ID	Name	Start Date	Due Date	Last Updated	Originated By	Assigned To	Action Team	Reviewed By	Root Cause	Resolution	Completion Date	Status	Priority Code	Followed Up By	Related Issues	Related Audits
CA-21 Excel	QM Did Not Define Exclusions	25-Mar-2010	04-Apr-2010	25-Mar-2010	Matt Tholey							Needs Assignment				ID-107
Root Cause and Resolution Summary Information																
Root Cause and Resolutions														Number		

Prism is not expecting to experience any down time during the upgrade. The upgrade is scheduled to take place on 04/02/2010 during the early morning hours.