QMSCAPA for Workgroups

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ABCI Consultants

"Your Guide through the ISO Maze to Certification"

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QMSCAPA for Workgroups

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Table of Contents

Foreword 0

Part I Introduction to ISO System Management Software 1

1 About ABCI Software ... 2
Tech Support ... 3
2 About ABC ISO Consultants ... 4

Part II What's new in QMSCAPA? 5

Part III What's planned for QMSCAPA? 8

Part IV Download QMSCAPA Software 9

1 EULA ... 9
2 User Guide as PDF ... 12

Part V Quick Start Steps 12

1 Add a First User ... 13
2 Edit Company information ... 14
3 Add Human Resources ... 15
4 Add QMS Processes and Departments ... 16
5 Add CAPA Types ... 17
6 Add Preventive Action Classifiicaitons ... 18
7 Add or Edit CAPA Status ... 19
8 Add Master Document Index ... 20
9 Document Version History ... 21
10 Set the default data path ... 22
11 Set a Default Printer ... 24

Part VI Browse CAPA Log 24

1 Add or Edit a CAPA ... 26
2 Set the Default CAPA Form ... 28
3 Printing a CAPA Form ... 29
4 Printing a CAPA Report ... 30

Part VII Customer Complaint Log 31

1 Copy Customer Complaint to the CAPA Log ... 32
2 Customer Complaint Form ... 33
3 Customer Complaint Reports ... 34

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ComplaintLog01.rpt ... 35
ComplaintLog02.rpt ... 36
ComplaintForm01.rpt ... 36

Part VIII Quality Measurements 37

1 Customer Survey & Satisfaction Calculator ... 37
Survey Reports ... 38
2 Manufacturing and Production Quality Calculator ... 39
Mfg. & Production Calculator Form ... 40
3 On-time Delivery Log & Calculator ... 41
On-time Delivery Calculator Form ... 42
On-time Delivery Analysis Report ... 43
4 Purchasing Quality Metrics Calculator ... 45
5 Sales Quality Metrics Calculator ... 46

Part IX Dashboard for Monitoring Quality 47

1 QMS Dashboard Table ... 48
2 QMS Dashboard Form & Calculator ... 49
3 QMS Dashboard Label Sets ... 51
4 QMS Dashboard Report ... 53

Part X Internal Auditing for Quality 54

1 Audit Plans ... 55
Audit Plan Relationships to Elements & Audit Results ... 57
Audit Plan File Relationships ... 58
2 Audit Schedule ... 59
Audit Schedule Printing Options ... 59
On Screen Audit Schedule ... 60
On Screen Audit Results ... 60
Printing an Audit Schedule ... 61
Sample Audit Schedule ... 61

Part XI Login and Security Settings 62

1 User Security Options ... 64

Part XII Report Builder 65

1 What is a report builder? ... 67
2 Features Of Report Builder ... 67
3 Report Builder - User Interface ... 69
4 Databases ... 70
5 Fields ... 73
6 Database filters ... 73
7 Expressions and Formulas ... 74
8 Report Formatter Screen ... 76
Adding Text Frame ... 76

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Frames ... 77
Frame Properties ... 79
Report Bands ... 80
Sorting Bands ... 81
Group Band Properties ... 82
Concatenation Symbol ... 82
9 Dictionary ... 83
Dictionary - Built in Variables ... 83
Dictionary - Calculated Fields ... 83
Dictionary - Funtions ... 84
Dictionary - Gather Totals ... 85
Dictionary - Processed Files ... 85
Dictionary - Standard Functions ... 86
Dictionary - Standard Operators ... 89
Part XIII Training 92
1 Training Programs ... 93
Training Program Elements ... 94
2 Trained Students ... 95
3 Training Schedule ... 97
Adding Students to a Schedule ... 99
Part XIV Utilities 101
1 File Manager (Internal) ... 101
File Access Error ... 103
2 File Manager (External) ... 104
3 Spell Check ... 106
Part XV Vendor Table 106
1 Vendor Edit Window ... 108
2 Vendor Reports ... 110
Sample Vendor Report ... 111
Part XVI Appendix 112
1 Framework & Layout ... 113
Index 114

1 Introduction to ISO System Management Software

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QMSCAPA for Workgroups, 1.2.17*

QMSCAPA™ stands for Quality Management System, Corrective Actions and Preventive Actions (CAPA).

A Corrective Action Request and Preventative Action Request tracking software system is essential for any quality system. It is a regulatory requirement that FDA / global regulatory inspectors and ISO auditors consider mission critical. When implemented properly, a Corrective Action (CAPA) software system improves product quality and safety, increases customer satisfaction, and more importantly, ensures FDA and ISO compliance.

QMSCAPA™ is a Microsoft Windows compatible software database application, which is designed to generate CAPA forms and a log for a Quality Management Systems based upon the ISO 9001:2008 Standard, AS9100, ISO 13485, TS16949 and TL9000.

QMSCAPA™ is designed by a user group of quality professionals, including assessors, auditors, consultants and quality managers for quality management systems.

Features in Version 1:

- Database for logging Corrective Actions, Preventive Actions, and Non-conformance.
- Database for logging Customer Complaints.
- Internal Audit Schedule for One or More Standards/System.
- Internal Audit Results Log for Management Review.
- Directory of Management Personnel/Resources.
- Custom CAPA form generator and CAPA report builder.
- Optional database for maintaining a master document index.
- Database for recording personnel that are associated with the QMS.

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- Database for recording personnel training records.
- Vendor database with approval, status and tier levels.
- Support for multiple simultaneous users.
- Multilevel access security and control.
- On-Time Delivery Calculator
- Customer Satisfaction Survey & Calculator
- Customer Look-up Table linked to Surveys, On-time Delivery logs and the CAPA files.
- Shipping Carrier Table
- Manufacturing & Production Quality Metrics Calculator
- Purchasing Quality Metrics Calculator
- Sales Quality Metrics Calculator
- Dashboard for Monitoring Quality

Learn what's new and what's planned for QMSCAPA software

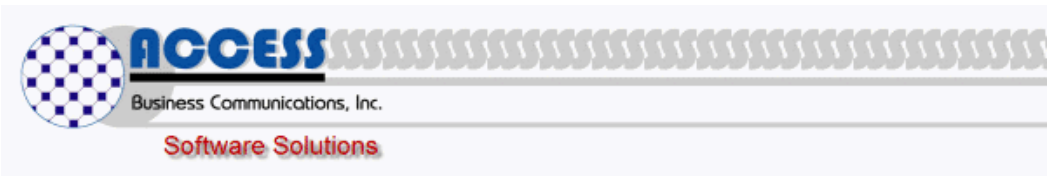
Computer Requirements:

- Windows XP, SP3, or;
- Windows Vista, Windows 7, Windows 8 or;
- Windows 2003 Server, or;
- Windows 2008 Server, or;
- Windows 2012 Server.

ABCI recommends Windows 2008 Server, or higher with Terminal Services for simultaneous multiple Remote Desktop Users.

*The current application may be later than this publication.

1.1 About ABCI Software



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Nothing gets developed, published or implemented unless someone has a goal to get something done, better and faster.

Custom Software Development for Business Applications

We develop software ranging from desktop software through to server-based web systems and a mixture of the two.

Published Software Titles

- **CRMworx**™ ~ Contact Management for Workgroups
- **TelcoMgr**™ ~ Telecommunications Management Software
- **SWORD**™ ~ Field Service & Shop Work Order Routing and Dispatch Software
- **CablePro**™ ~ Network Cable Management and Documentation Database
- **ProjexPro**™ ~ Simplify Complex Project Management
- **CalcTime**™ ~ Calculate Time with Simple Software Tool
- **Custom Software Titles**

For more information, please visit http://www.abci-software.com on the World-wide Web.

1.1.1 Tech Support

Need help? Here you go!

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We provide several levels of user assistance for our products, from excellent user manuals to direct email support and real-time telephone support, which may include CrossLoop session.

If you have a question about an ABCI Software application, please check out the tutorials and user guides first, which are available for download with each application. You will most probably find your question answered in the appropriate user guide or one of the following online help sites

Help desk

Hours of Operation: M - F 09:00 - 18:00 PST
If you can't find an answer to your question in the user manuals, tutorials

and online web sites, contact us via email:
sherlock@abci-software.com
Optional Real-Time Support (Fee Based):
We also can provide real-time telephone support by appointment. Real-time support may be purchased in advanced by clicking on the following link: Buy Support

1.2 About ABC ISO Consultants

QMSCAPA is sponsored by ABC ISO Consultants

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Access Business Communications, Inc., founded in 1999 and incorporated in California, has emerged over the past ten years with an excellent reputation for providing consultation, publications, software and training related to advanced communications and international management systems.

Today we offer the following main services:

- Provide advice and assistance on the development and implementation of systems, including preparation of documentation, work instructions, and forms.
- Assist with the development of procedures for management review, internal auditing and training.
- Identify improvement or development within your current management system.
- Prepare an action plan to address those improvement areas, in conjunction with your personnel.
- Help establish a Process Improvement Team (PIT) to assist with the design and implementation of the system requirements.
- Conduct a health check audit to ensure the effective implementation of your management system prior to external audit by your chosen certification body.
- Assist you with post certification developments of your management system.

2 What's new in QMSCAPA?

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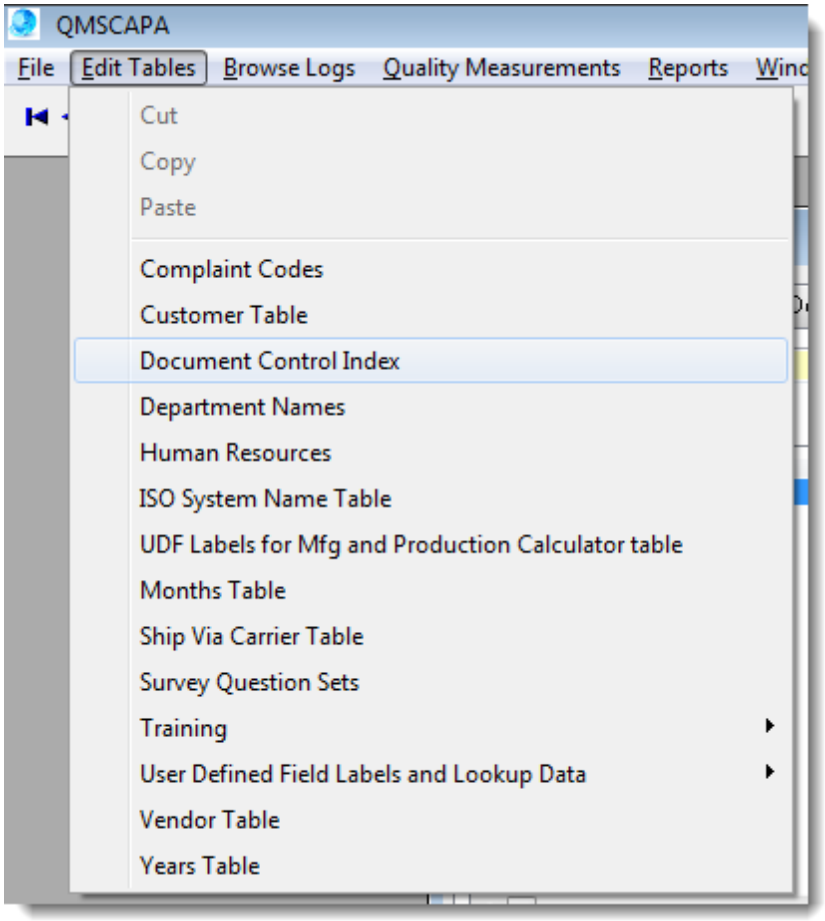
QMSCAPA for Workgroups, 1.2.17

QMSCAPA™ is quality management software designed by a user group of quality professionals, including assessors, auditors, consultants and quality managers for quality management systems. If you have an idea or new feature that you would like to see in **QMSCAPA** please join our user group by completing our web form.

06/16/2014 Version 1.2.17



1) Added new features to the Document Management Module;
   a. Moved the Document Control Index to the **'Edit Table'** menu option.
   b. Added Approved Date field;
   c. Added Effective Date field;
   d. Added Numeric Version counter field;
   e. Added File Path & Name field;
   f. Added a Document Version History table;
   g. Updated Document Index by Document Id (report);
   h. Updated Document Index by Title (report);
   i. Add Document Index by Path & File Name (report).

05/05/2014 Version 1.1.7
2) Added support for the Windows 8 manifest;
3) Added support for the Windows Server 2012 Edition;
4) Corrected and tweaked user interface.

10/27/2012 Version 1.0.635
1) Added a Customer Complaint browse tables and reports.

10/09/2012 Version 1.0.607
1) Corrected the way MS Word is loaded for Spell Checking. MS Word is loaded in the background when the F7 Key is depressed.

10/06/2012 Version 1.0.598

1) Added Training Programs browse tables and reports, includes training courses, training schedule and trained student records.
2) Added a process for identifying ***Audit Plans*** to Copy the annual *internal audit schedule* for one or more standards from year to year.
3) Added ' *Spell Check* ' for 'text fields' on most of the primary window forms.

7/20/2012 Version 1.0.498

1) Added framework and databases for new **Dashboard for Monitoring Quality**, which includes Quality Measurement Dashboard table, Dashboard window and a Quality Dashboard report.
2) Corrected look-up for the Company file when printing reports. Company logo and name print correctly again.
3) Created standalone File Manager bot for external database maintenance.

7/3/2012 Version 1.0.418

1) Manufacturing and Production Quality Calculator
   a) Added a Manufacturing and Production table and form for calculating the over-all quality score as a percentage.
   b) Added Mfg. and Production Analysis report for monitoring Manufacturing and/or Production quality.
2) Purchasing Quality Metrics Calculator
   a) Added a Purchasing table and form for calculating the over-all purchasing quality score as a percentage.
   b) Added a Purchasing Analysis report for monitoring Purchasing quality.
3) Sales Quality Metrics Calculator
   a) Added a Sales Contract table and form for calculating the over-all Sales quality score as a percentage.
   b) Added a Sales Analysis report for monitoring Sales quality.

6/24/2012 Version 1.0.362

4) Added Department Name lookup table to the Employee table and form.
5) Added a Customer lookup table in the CAPA form.
6) Corrected the Vendor lookup in the CAPA form.
7) Added Customer Survey & Satisfaction Calculator
   a) Added a table for multiple Customer Survey Questions sets, which provides flexibility for many different industry and business types.
   b) Added Survey table and form for calculating customer satisfaction.
   c) Added Survey form printing.
   d) Added Survey results reports for monitoring customer satisfaction.
8) On-time Delivery Log & Calculator
   a) Added Delivery table and form for calculating delivery and shipping results.
   b) Added On-time Delivery Analysis report for monitoring on-time delivery.

3/12/2012 Version 1.0.247

1) Moved security file to user selected data folder.
2) Made login optional for first time users.
3) Minor window and tab sequence adjustments.

2/18/2012 Version 1.0.239

1) Added to horizontal and vertical scroll bars to the main window document frame to allow easier navigation on smaller computer screens.
2) Fixed tab order on the CAPA form window.
3) Added cwhhla.dll to installation wizard.

2/11/2012 Version 1.0.219

1) Added vendor table
   a) Added vendor field to CAPA window and printed form
   b) Added two Vendor reports
      i) By vendor name in alphabetical order
      ii) By Tier Level and vendor name in alphabetical order

1/18/2012 Version 1.0.201

1) Internal Audit Schedule
   a) Internal Audits Log
   b) Internal Audit Reports
2) Fixes
   a) The Reports Directory now follows the user select Data Directory.

3 What's planned for QMSCAPA?

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If you have not joined our QMSCAPA user group, we encourage your joining and welcome your input on how we can improve QMSCAPA.

The planning information and feature descriptions that appear under the topic "What's Planned for QMSCAPA" are subject to change without notice. Some features may be incorporated into a custom version and released as a minor product upgrade (number to the right of the decimal in a version designation and formed as #.#.

Do you have a suggestion or improvement for QMSCAPA? Contact sherlock@abci-software.com. The following is our current "To Do List" to improve QMSCAPA.

Future Development

❑Customer Complaint input form and database
❑ Management Review input form and database.
❑ Product and customer requirements review form and actions arising from the review.
❑ Design input records database relating to product requirements, design review and necessary actions.
❑ Results of the design verification database.
❑ Supplier evaluation form and database.
❑ Validation of processes form and database.
❑ Unique identification of products database.

- ❑ Customer property records of lost or damaged customer property and communication to the customer.
- ❑ Records to record the person authorizing the release of product.
- ❑ Database for recording the calibration of measuring and monitoring devices.

4 Download QMSCAPA Software

QMSCAPA may be download from ABCI Software by joining our Quality Users Group.

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Once you install QMSCAPA you may need the following login information:

Login = 'mgtrep' (exclude quotes)
Password = 'mgtrep' (exclude quotes)

End-User License Agreement

Download User Guide as PDF

4.1 EULA

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ELECTRONIC END USER LICENSE AGREEMENT (EULA)
FOR QMSCAPA™

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5. Governing Law and General Provisions. This Agreement will be governed by the laws of the State of California, U.S.A., excluding the application of its conflicts of law rules. This Agreement will not be governed by the United Nations Convention on Contracts for the International Sale of Goods, the application of which is expressly excluded. If any part of this Agreement is found void and unenforceable, it will not affect the validity of the balance of the Agreement, which shall remain valid and enforceable according to its terms.
You agree that the Software will not be shipped, transferred or exported into any country or used in any manner prohibited by the United States Export Administration Act or any other export laws, restrictions or regulations. This Agreement shall automatically terminate upon failure by you to comply with its terms. This Agreement may only be modified in writing signed by an authorized officer of ABCI.

6. Notice to Government End Users. The Software and Documentation are “Commercial Items," as that term is defined at 48 C.F.R. §2.101, consisting of "Commercial Computer Software" and "Commercial Computer Software Documentation," as such terms are used in 48 C.F.R. §12.212 or 48 C.F.R. §227.7202, as applicable. Consistent with 48 C.F.R. §12.212 or 48 C.F.R. §§227.7202-1 through 227.7202-4, as applicable, the Commercial Computer Software and Commercial Computer Software Documentation are being licensed to U.S. Government end users (A) only as Commercial Items and (B) with only those rights as are granted to all other end users pursuant to the terms and conditions herein. Unpublished-rights reserved under the copyright laws of the United States.

4.2 User Guide as PDF

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Download User Guide as PDF

CAUTION: This is a large file, which is a replicate of the online User Guide. Unfortunately, the PDF version is not updated as often as the online version.

5 Quick Start Steps

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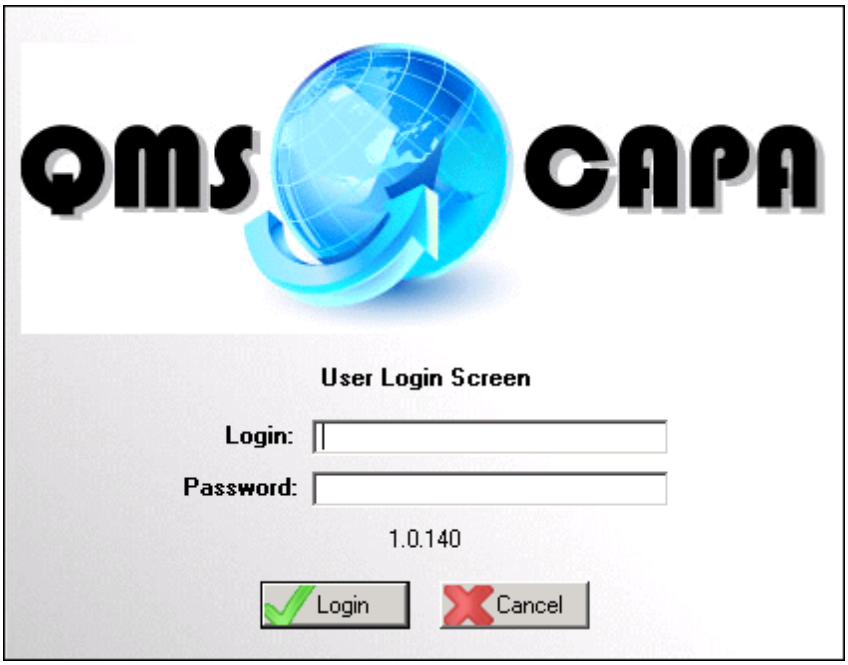
Follow these simple steps to begin using QMSCAPA.



The QMSCAPA application may have the security feature activated.

The default Login and Password for QMSCAPA is 'mgtrep.'

Note: New first-time users may see the Path Manager window open to set the **default data path**.

5.1 Add a First User

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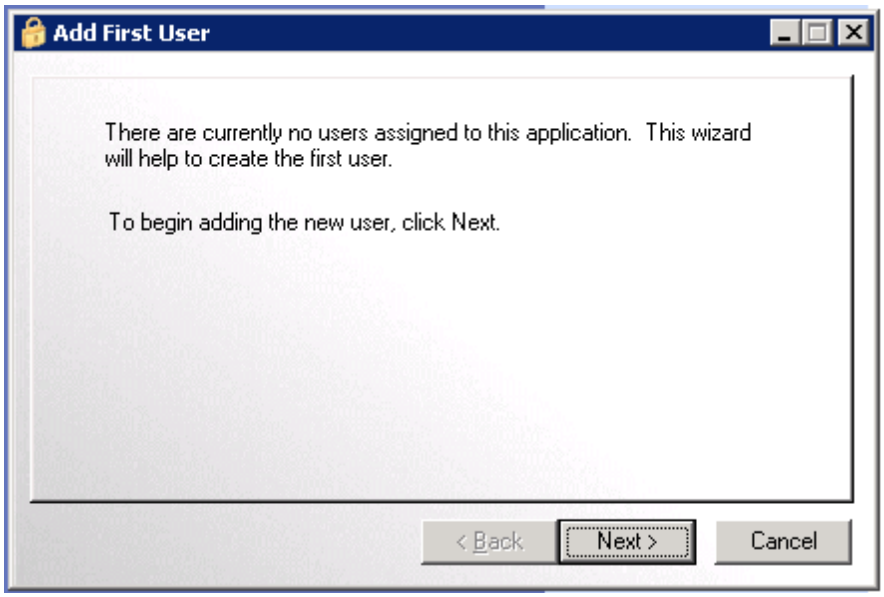
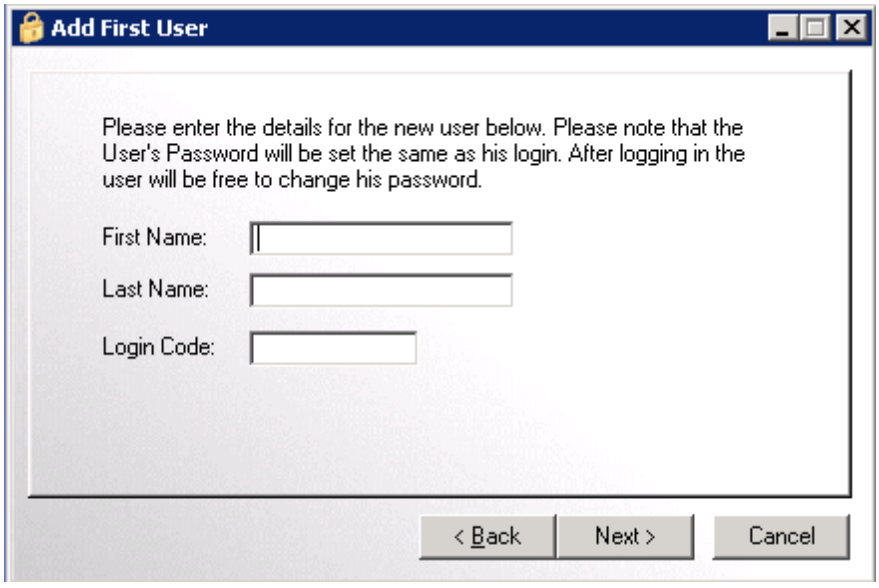
First-time users may be required to enter the "first user."



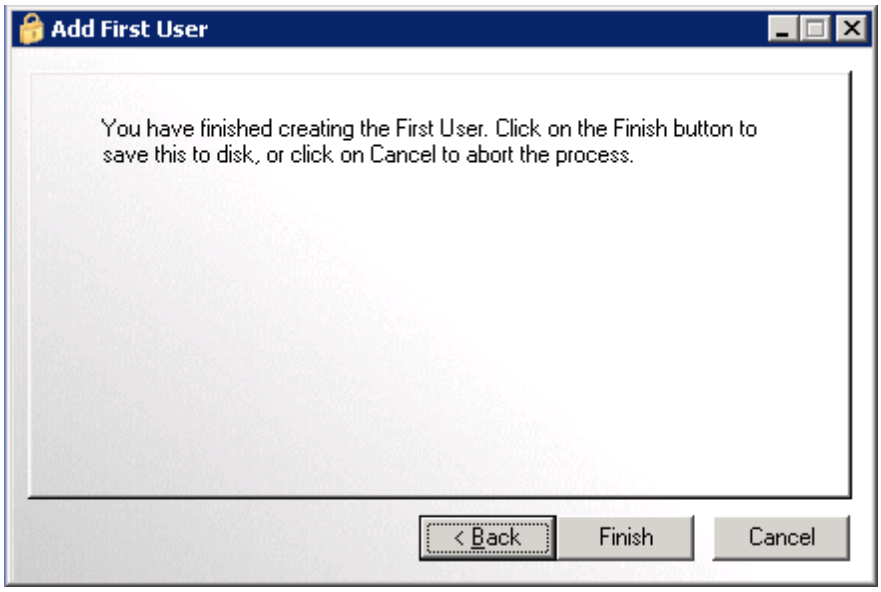
The "first-user" is also considered the primary system manager.



Suggested first-user:

First Name: Management
Last Name: Representative

Login Code: mgtrep (The login code is also the first password!)



5.2 Edit Company information

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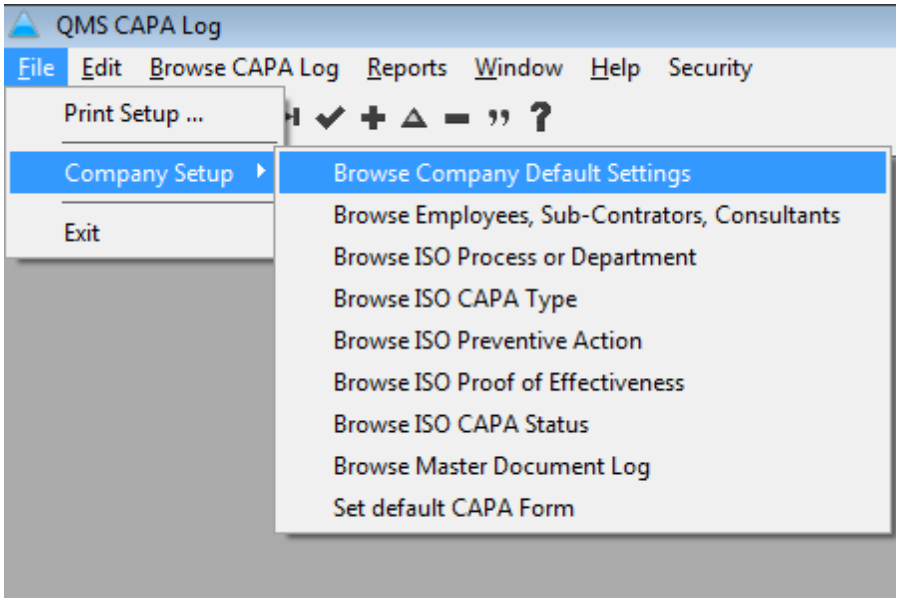
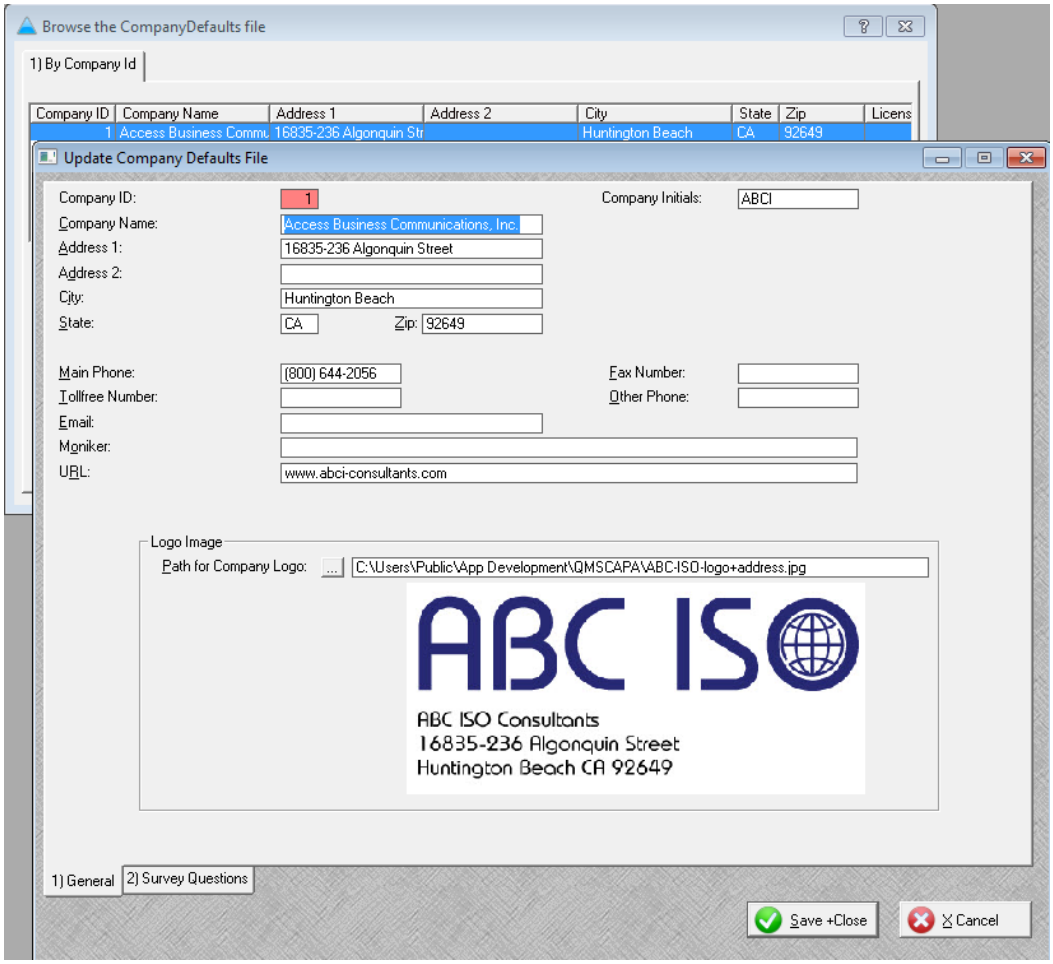


1. Add or edit your company information and select an appropriate logo "image.jpg" file.



5.3 Add Human Resources

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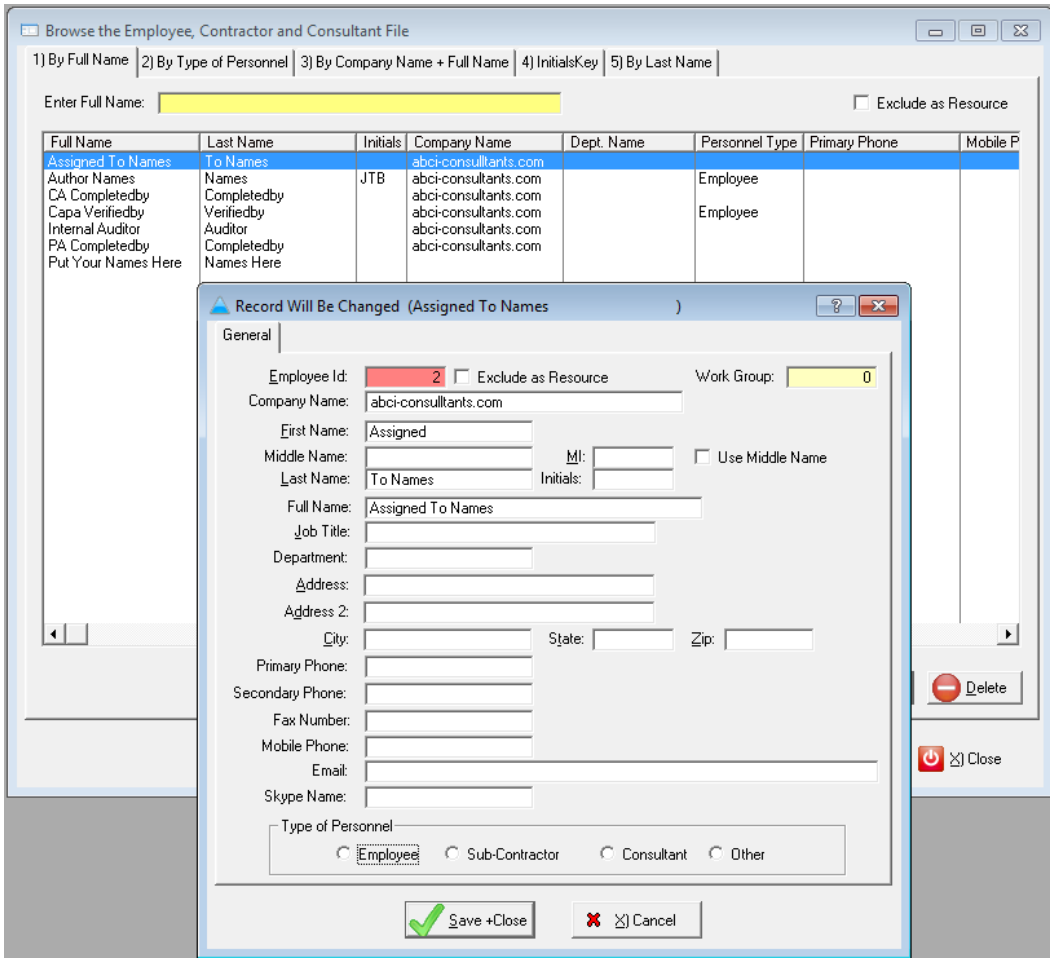
As a minimum you will need to add the personnel that QMS responsibilities, including:

- Anyone allowed to generate a Corrective Action Request or Preventive Action Request;
- Anyone that may be assigned to handle a CAPA;
- Anyone that may be required to verify a finding;
- Internal Auditors;
- Management Representatives;
- Anyone that may be required to conduct a Management Review of CAPAs.



5.4 Add QMS Processes and Departments

Add the QMS Procedures and Departments table which may directly be associated with quality.

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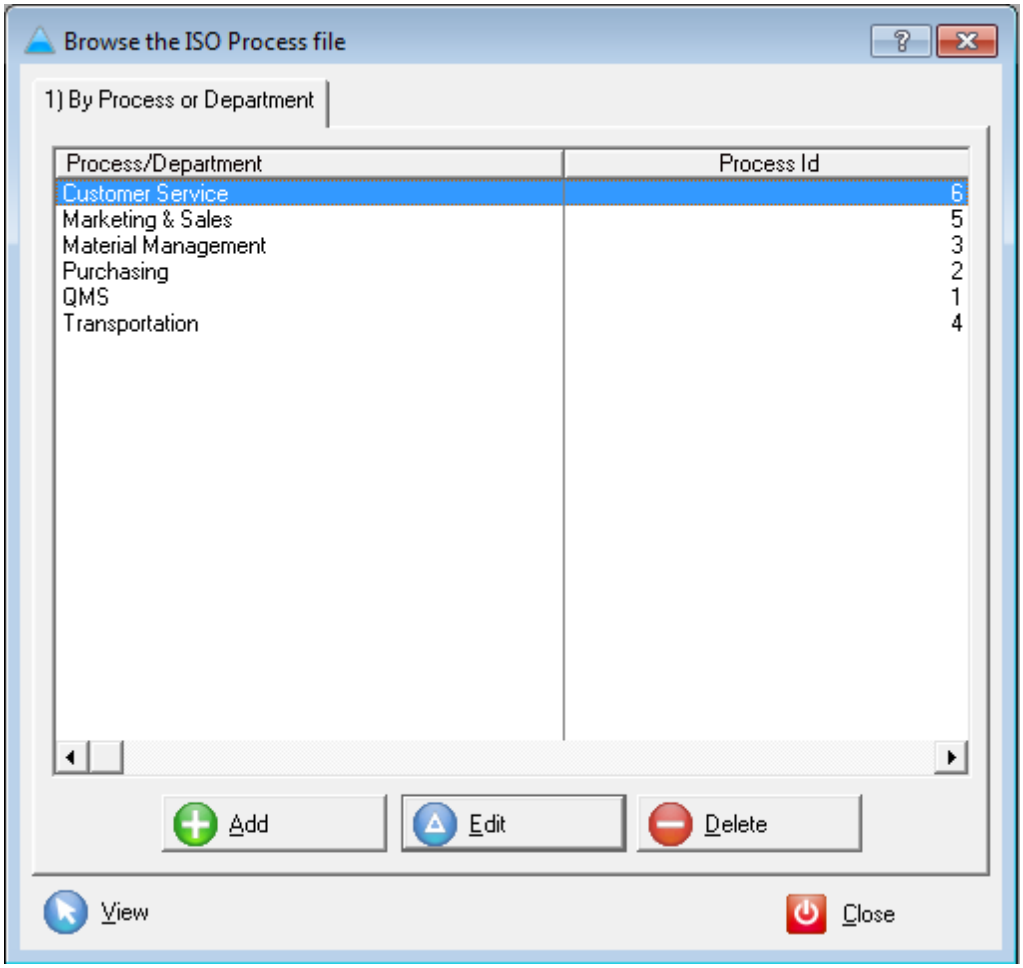

5.5 Add CAPA Types

Add or edit the CAPA Types table.

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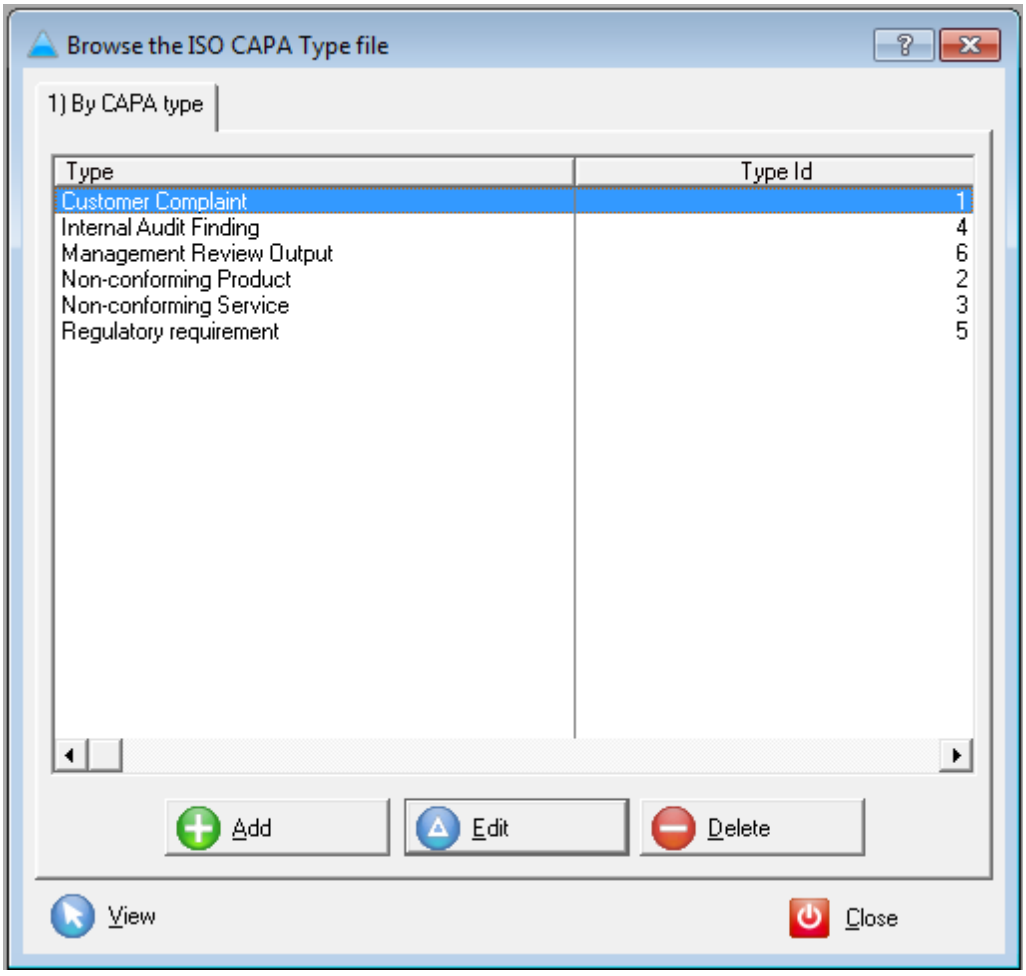

5.6 Add Preventive Action Classifiicaitons

Add or edit Classifications for Preventive Action Request table.

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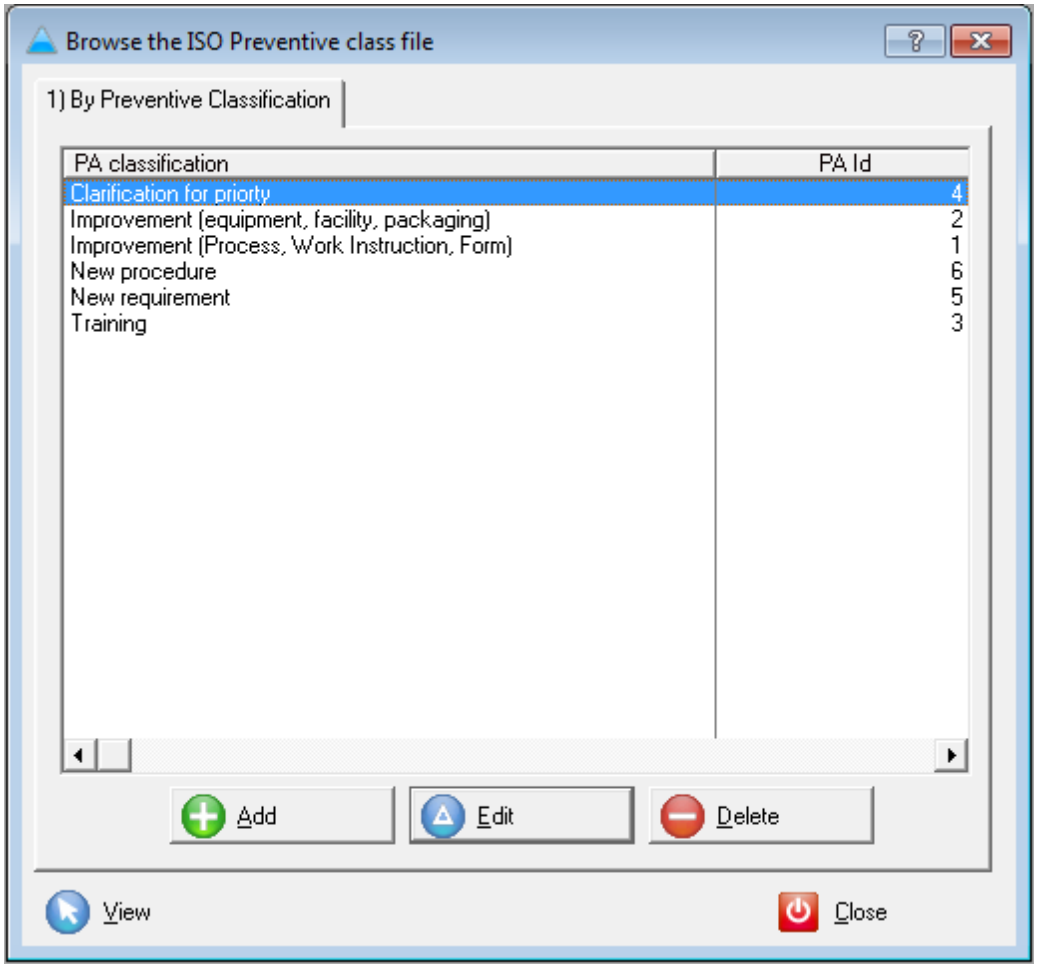

5.7 Add or Edit CAPA Status

Add or edit the CAPA Status table.

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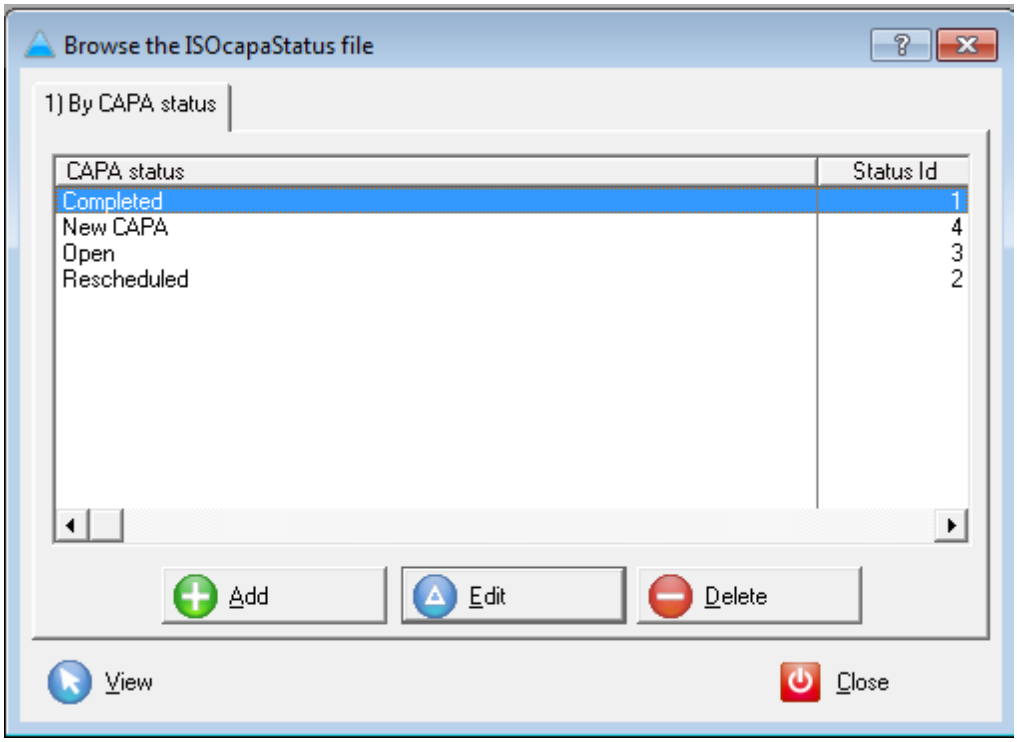

The follow CAPA status records should not be deleted or changed:

1. Completed
2. New CAPA
3. Open
4. Rescheduled

5.8 Add Master Document Index

Add or edit the Master Document Index table; a.k.a. Document Control Index.

As a minimum, you must add your CAPA form.

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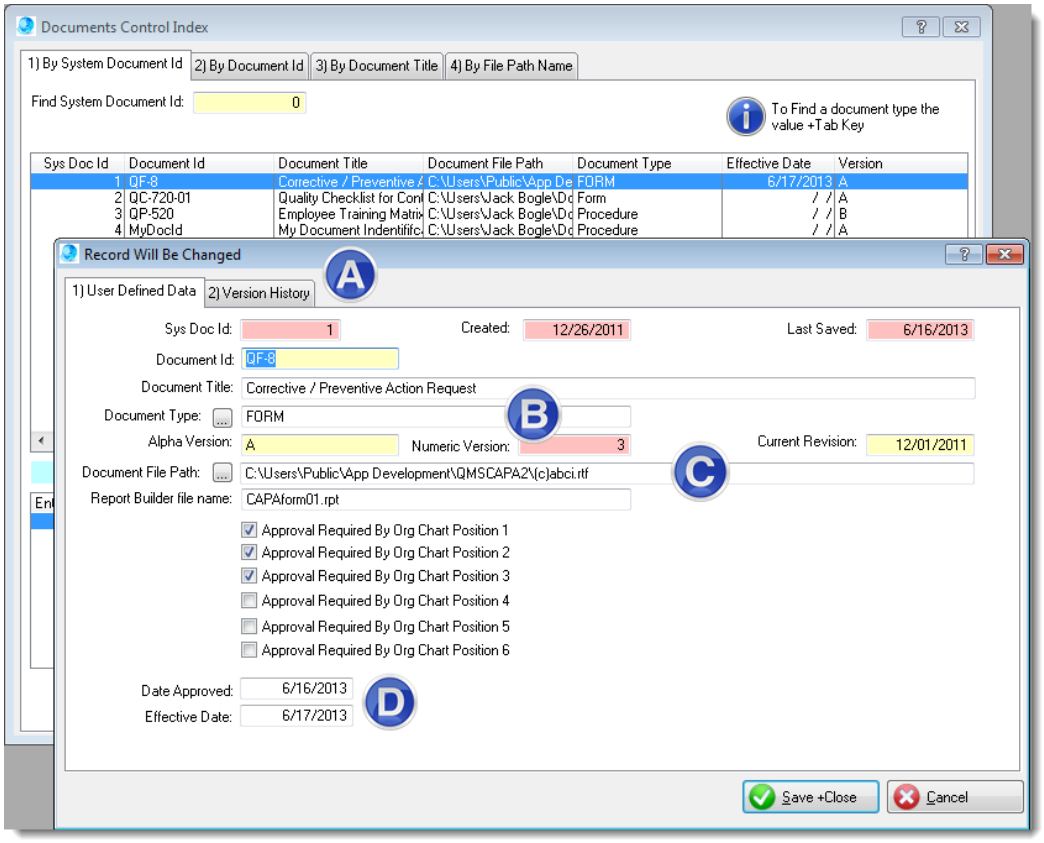

A. Version history may be recorded on the 2) Version History tab.

B. Alpha or numeric version identification.

C. Store the full path to the actual document.

D. Date approved and the effective date of the document may be recorded.

5.9 Document Version History

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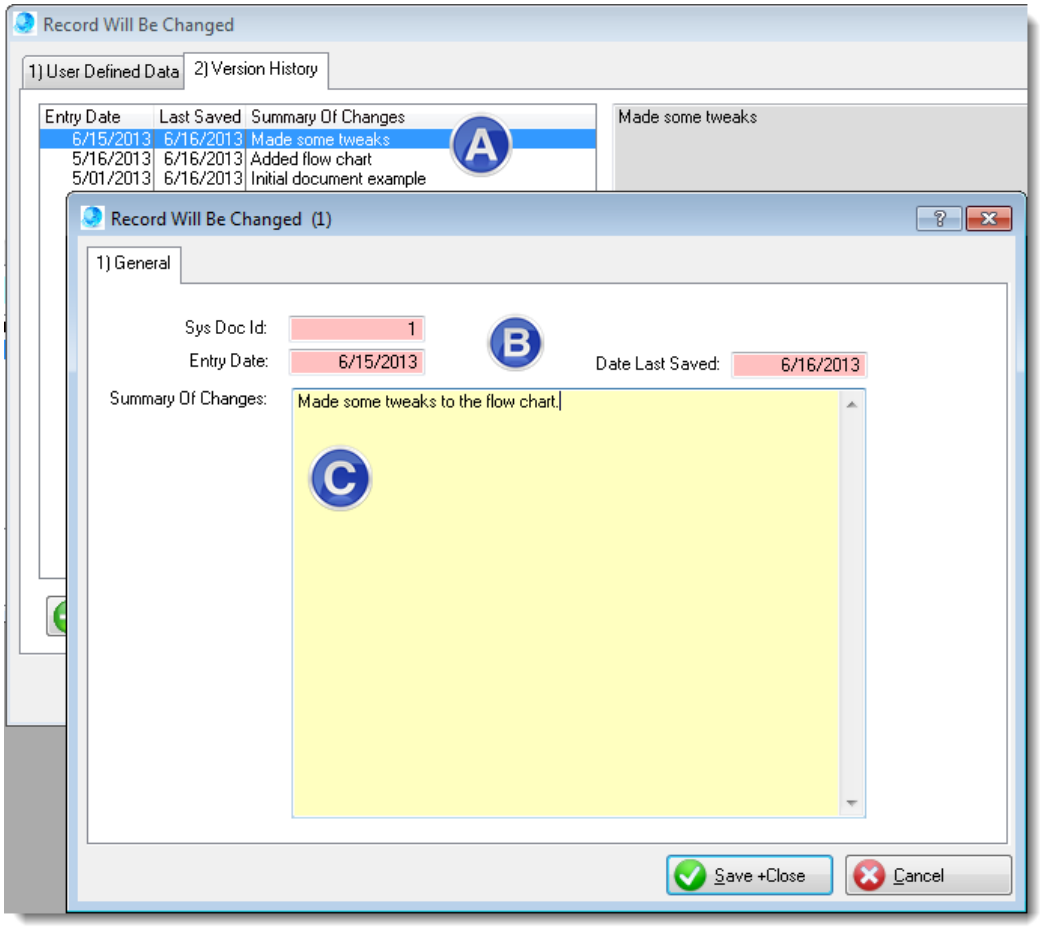

A. The document version history table is displays the 'entry date' in descending order so the most recent change is displayed first.

B. The 'entry date' and 'last saved' are automatically generated.

C. The 'summary of changes' is a free form field to describe key changes to the controlled document.

5.10 Set the default data path

New first-time users may need to navigate to the QMSCAPA data folder.

The default setting is **C:\Users\Public\Documents\ABCI\QMSCAPA;** Of course, if you are installing QMSCAPA on a server or shared drive you will need to set the appropriate shared folder privileges for one or more users.

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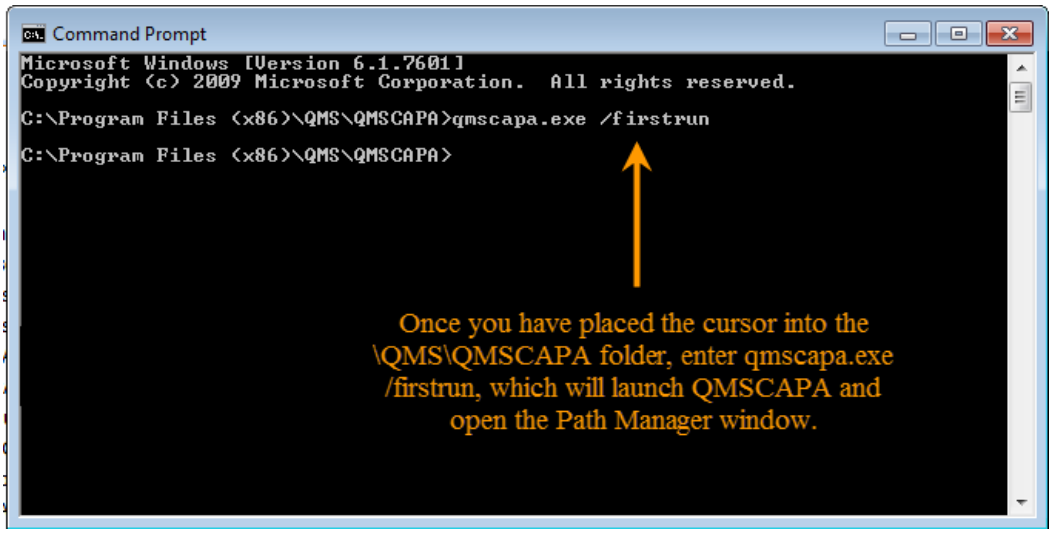
The default location for the QMSCAPA.EXE file is:

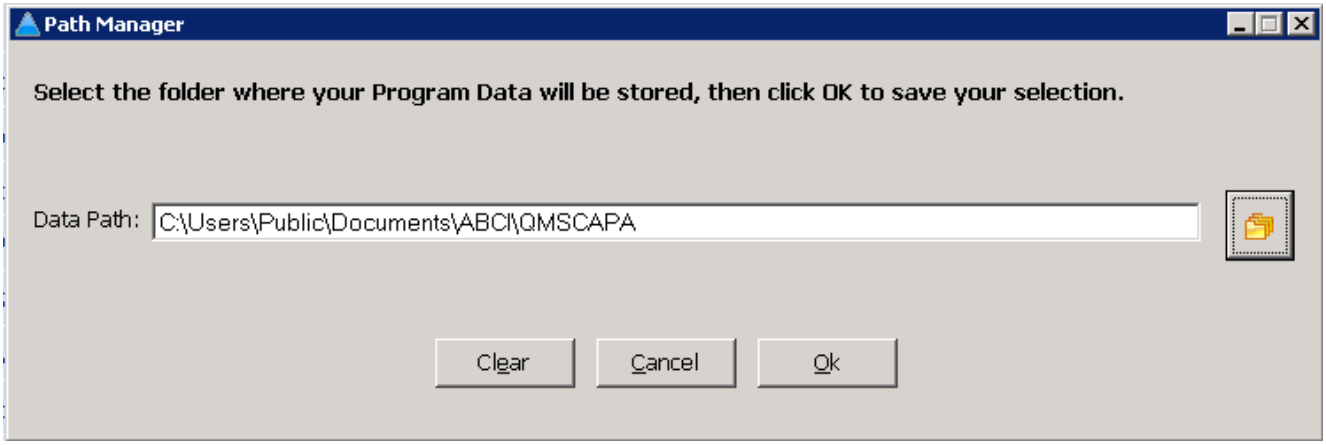
c:\Program Files (x86)\qms\qmscapa\

Note about the FIRST RUN option and the Path Manager window
If you move the QMSCAPA data folder you will need to reset the path for the QMSCAPA data folder from the "Windows OS Command Prompt."

c:\Program Files (x86)\qms\qmscapa\qmscapa.exe /firstrun



The 'FIRSTRUN' option will launch QMSCAPA and open the Path Manager window.



5.11 Set a Default Printer

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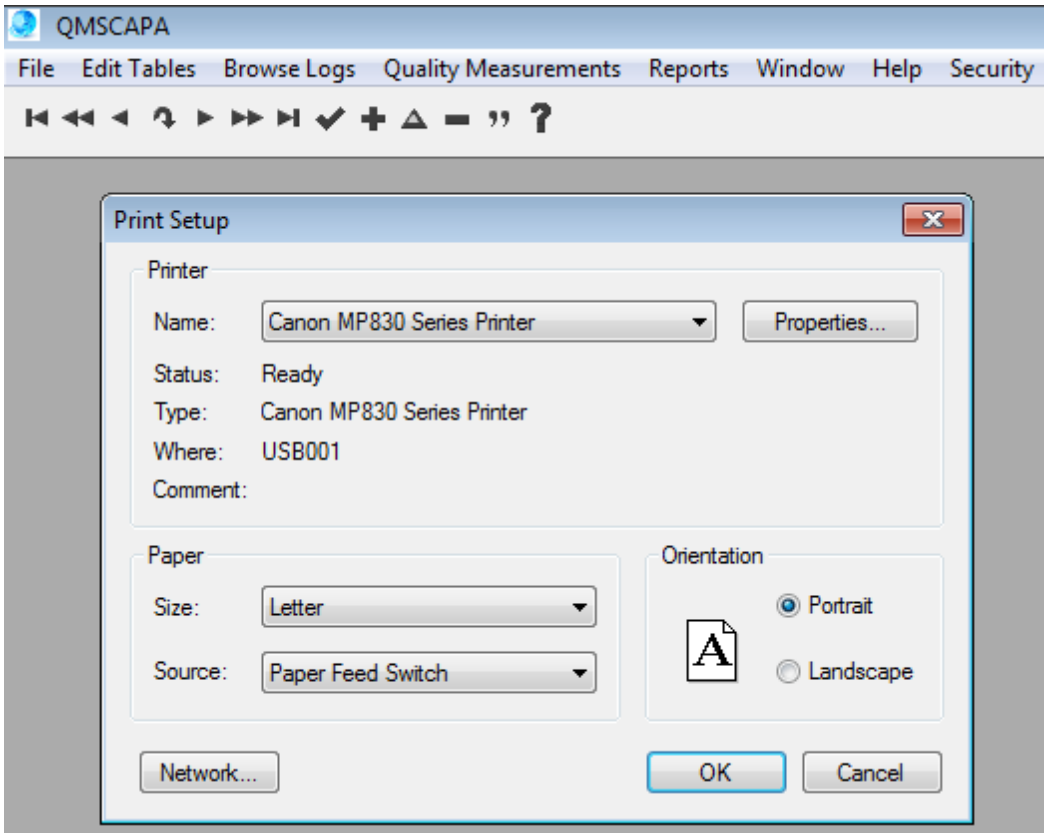
QMSCAPA requires a default printer set in the Windows OS to print preview or to print to a printer devices.



6 Browse CAPA Log

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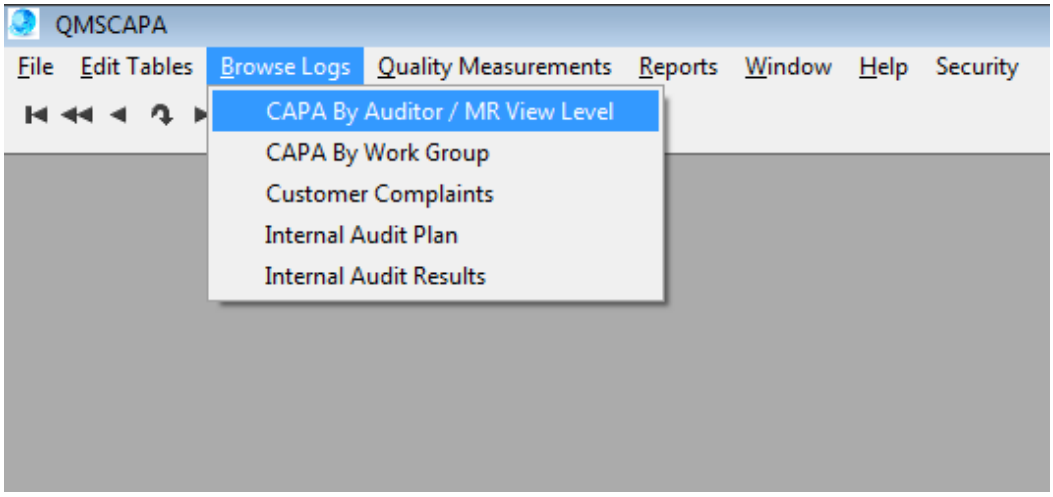
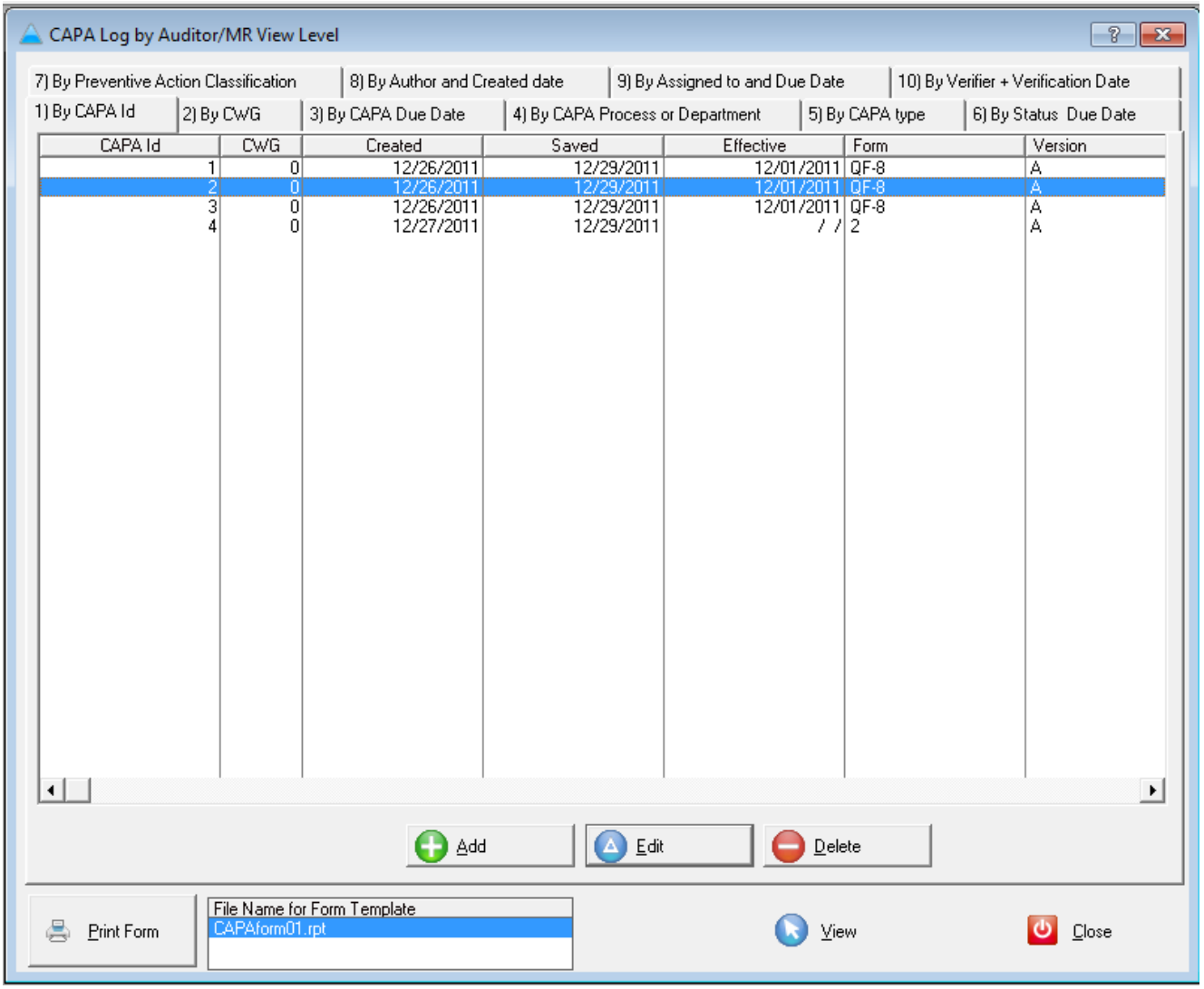


The Browse CAPA Log menu provides two options:

1. By Auditor / MR View Level, shows all CAPAs for all users/groups and requires a "supervisor" login or the appropriate access rights applied to a specific login.
2. By Work Group, shows all CAPAs for the Current Work Group (CWG code) as set by the users login rights.

The CAPA table may be viewed according to the following sort orders:

1. By CAPA Id
2. By CWG (Current Work Group)
3. By Due Date
4. By CAPA Process or Department
5. By CAPA Type
6. By Status & Due Date
7. By Preventive Action Classification
8. By Author (originator) & Created Date
9. By Assigned & Due Date
10. By Verifier & Due Date



6.1 Add or Edit a CAPA

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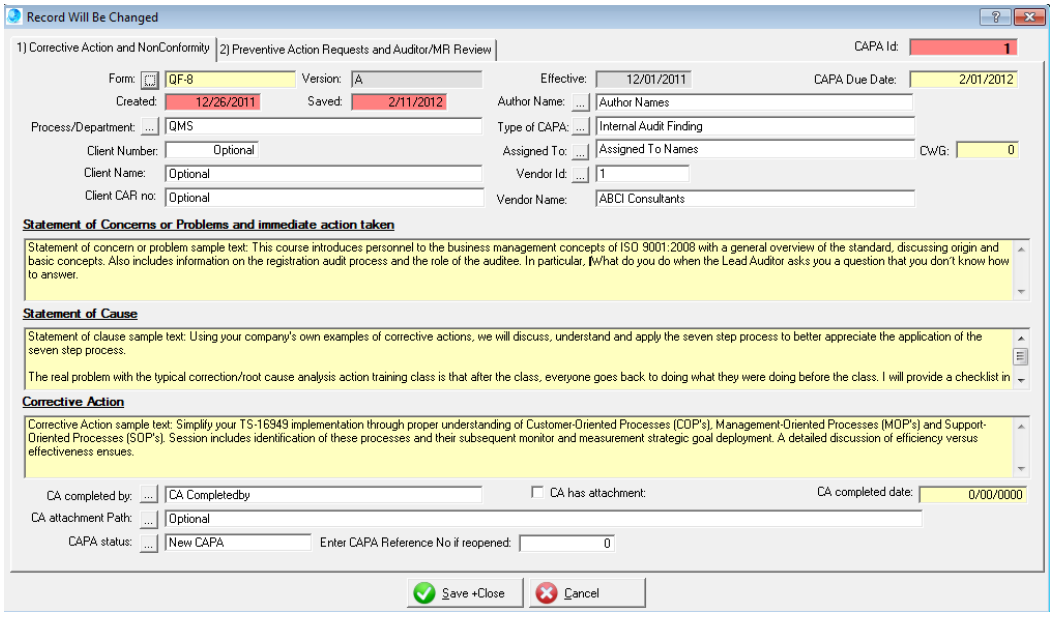
The CAPA window form is divided into two tabs:

- 1) Corrective Action and NonConformity, and;
- 2) Preventive Action Request and Auditor/MR Review

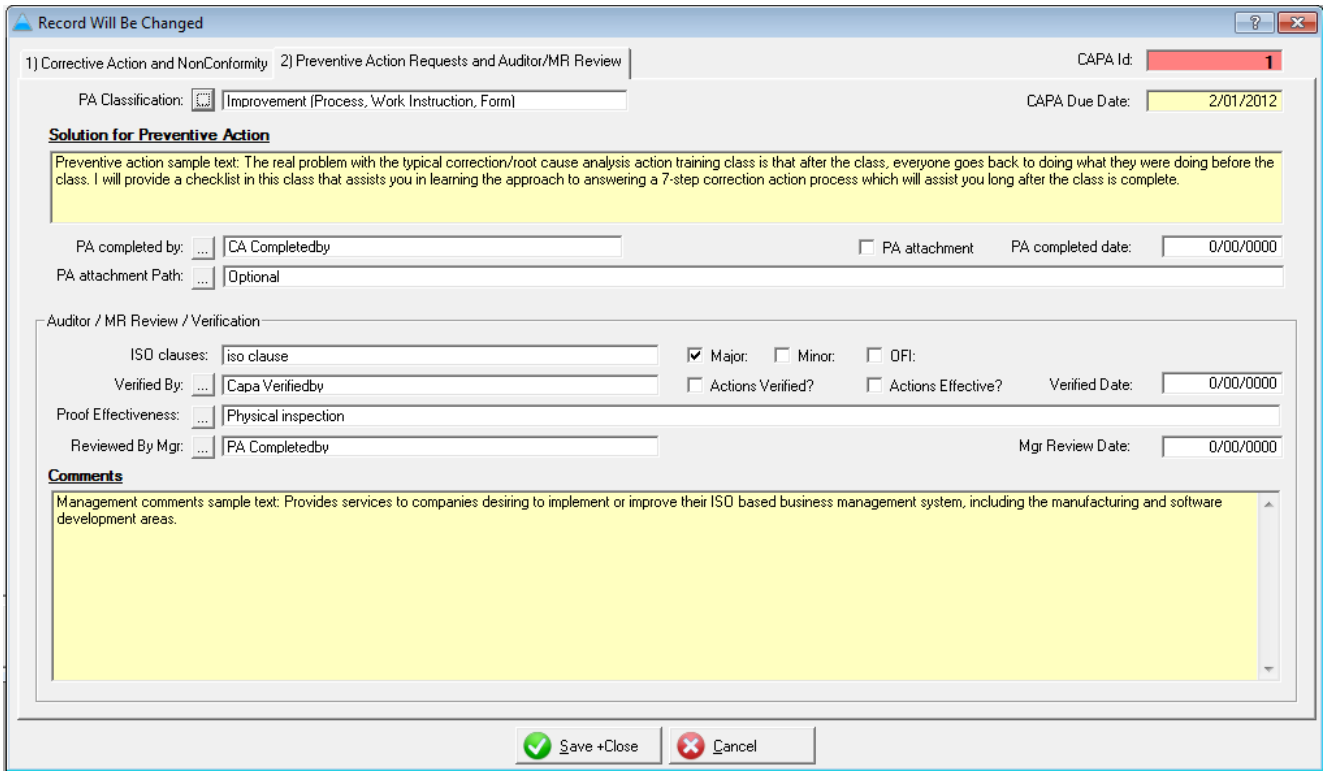
- Corrective Action and NonConformity Tab:

1. Use the default CAPA form name/number, the Version and Effective Date are populated by the Form Id.
2. Enter the appropriate CAPA Due Date.
3. The Created and Saved dates are automatically generated.
4. The Author Name is the person who originates the CAPA request.

5. The Process or Department that is most directly involved with the Statement of Concern or problem.
6. The Type of CAPA is related to the Action Request or Preventive Action and, or non-conformances.
7. The Client information is optional.
8. **Assigned to** is the person who will be taking or leading the Corrective Action or Preventive Action.
9. The CWG (Current Work Group) is a code that is related to the person or a group the person belongs as a member. The CWG is used to filter CAPAs that are for a specific person or group.
10. The Statement of Concerns is required.
11. The Statement of Cause, also known as "root cause."
12. The Corrective Action is a required.
13. The "CA completed by" is the person that completes the Corrective or Preventive Action request, which may be the same as the "Assigned to" person.
14. The CA attachment is optional.
15. The "CA completed date" is related to the Correction Action completion.
16. The "CAPA Status" is related to whether or not the CA or PA has been acted upon and, or completed.
17. If the CAPA Status is set to "New CAPA" then the "new CAPA Id number" should be entered into the "CAPA Reference" field.



- 2) Preventive Action Request and Auditor/MR Review Tab:



1. The "PA Classification" is used to group Preventive Actions into specific classes or types and groups.
2. The "Solution for Preventive Action" is optional, if not appropriate.
3. The 'PA Completed by" is the person that completed the PA.
4. The "PA Attachment" is optional.
5. The "PA Completed date" is the date the PA solution is adopted or implemented.
6. The "ISO Clause" and Non-conformance type (Major, Minor, OFI [Opportunity for Improvement] are optional.
7. The "Verified by" is the person that inspects the CAPA and determines if the solution was effective.
8. The "Verified date" is required.
9. The "Proof Effectiveness" is a comment that reports the proof used to verify the effectiveness of the CAPA.
10. The "Reviewed by Mgr" is the Management Representative or the appropriate Top Management person who reviews the CAPA.

6.2 Set the Default CAPA Form

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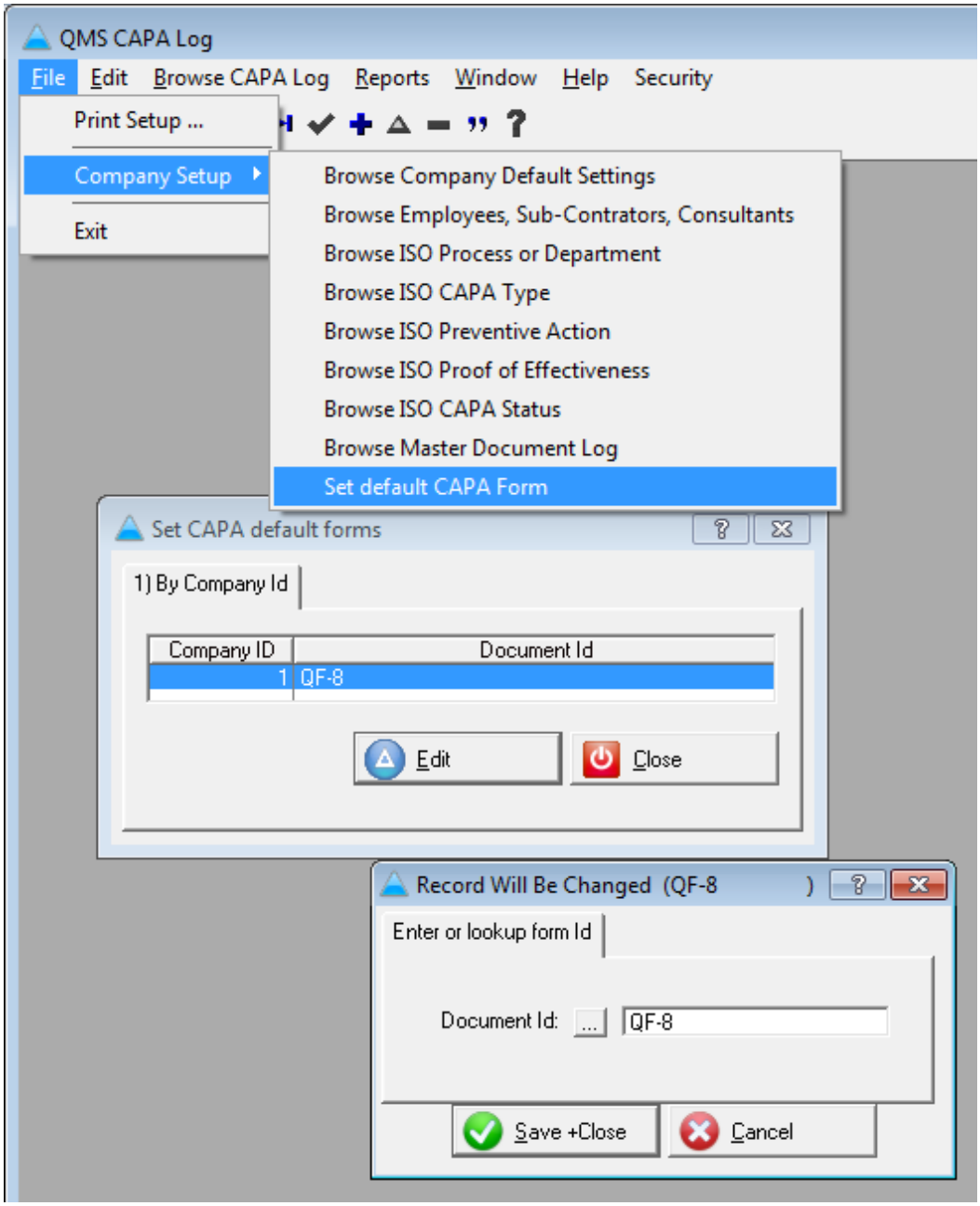

6.3 Printing a CAPA Form

1. Highlight the CAPA that you intend to print.
2. Click on the [Print Form] button.

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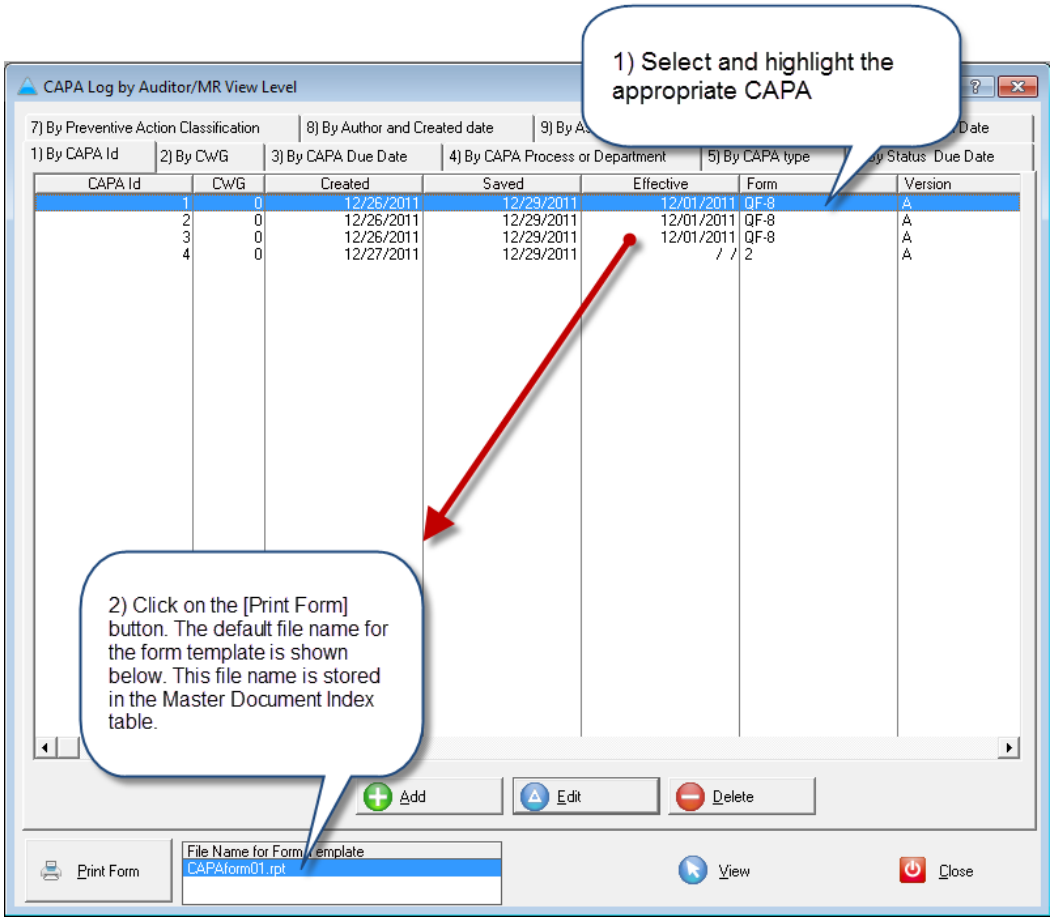

6.4 Printing a CAPA Report

Open the Report Builder Table.
1. Select the "Report" that you intend to print.
2. Click on the [Print Selected] button.

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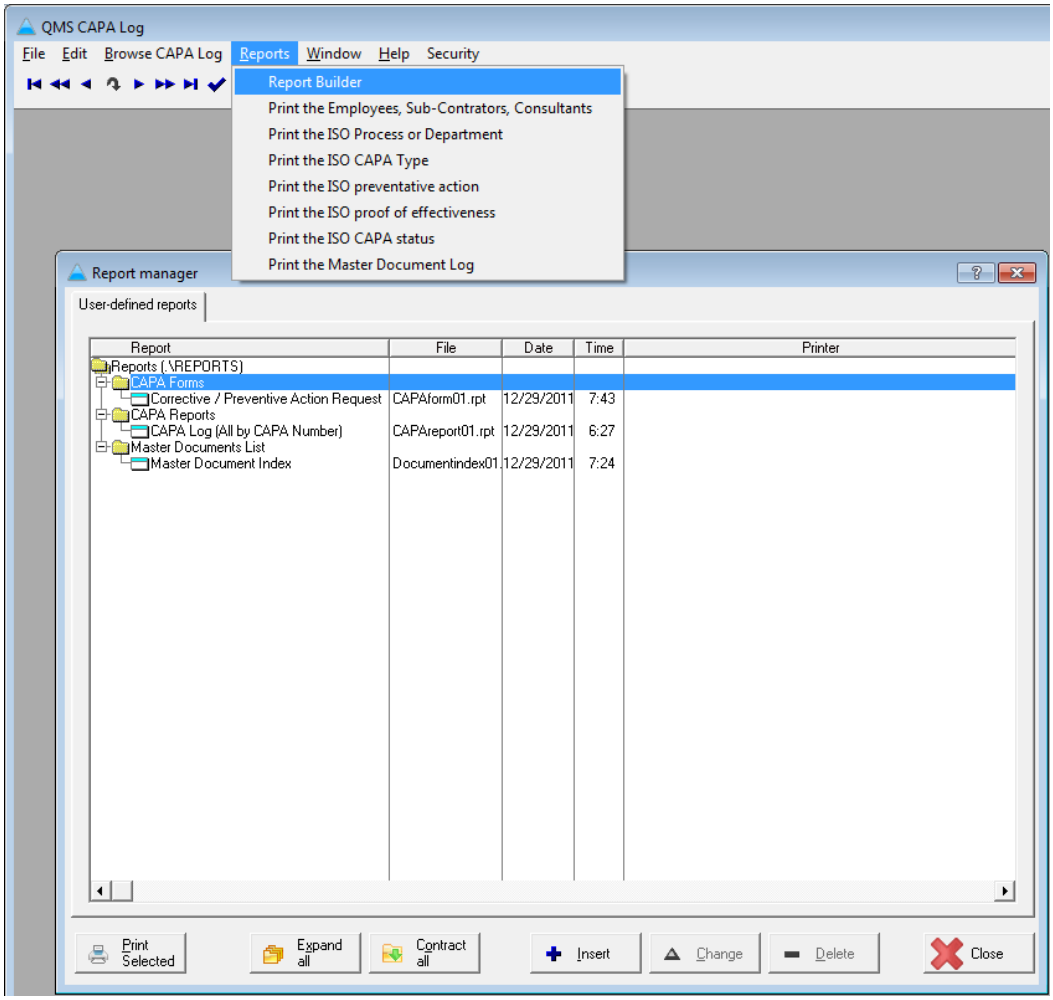

7 Customer Complaint Log

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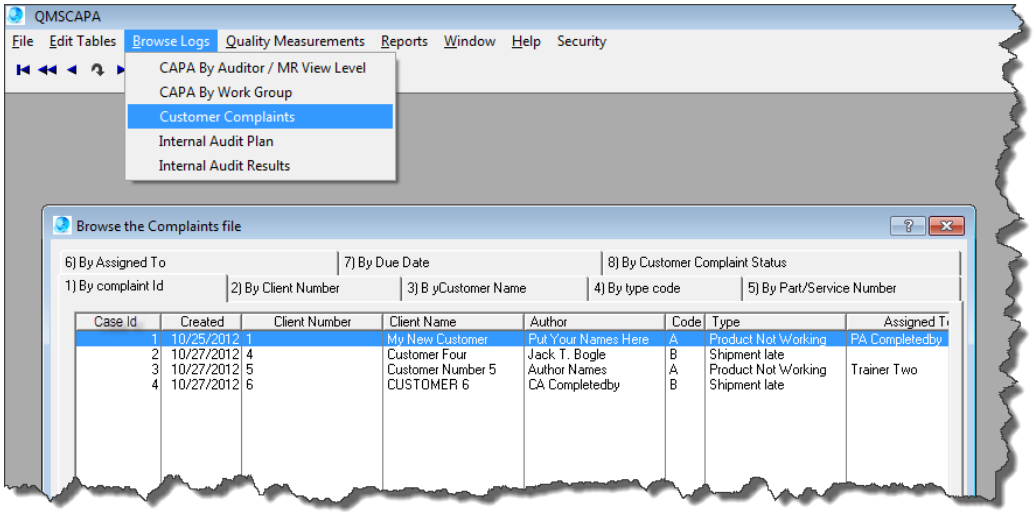
QMSCAPA provides an option to *log customer complaints* separate from the CAPA log.

The Customer Complaint Table includes the following sort options:

1. Complaint or Case Id number.
2. By Client Number
3. By Customer Name
4. By Complaint Type Code
5. By Part/Service Number
6. By Assigned To
7. By Due Date
8. By Customer Status



7.1 Copy Customer Complaint to the CAPA Log

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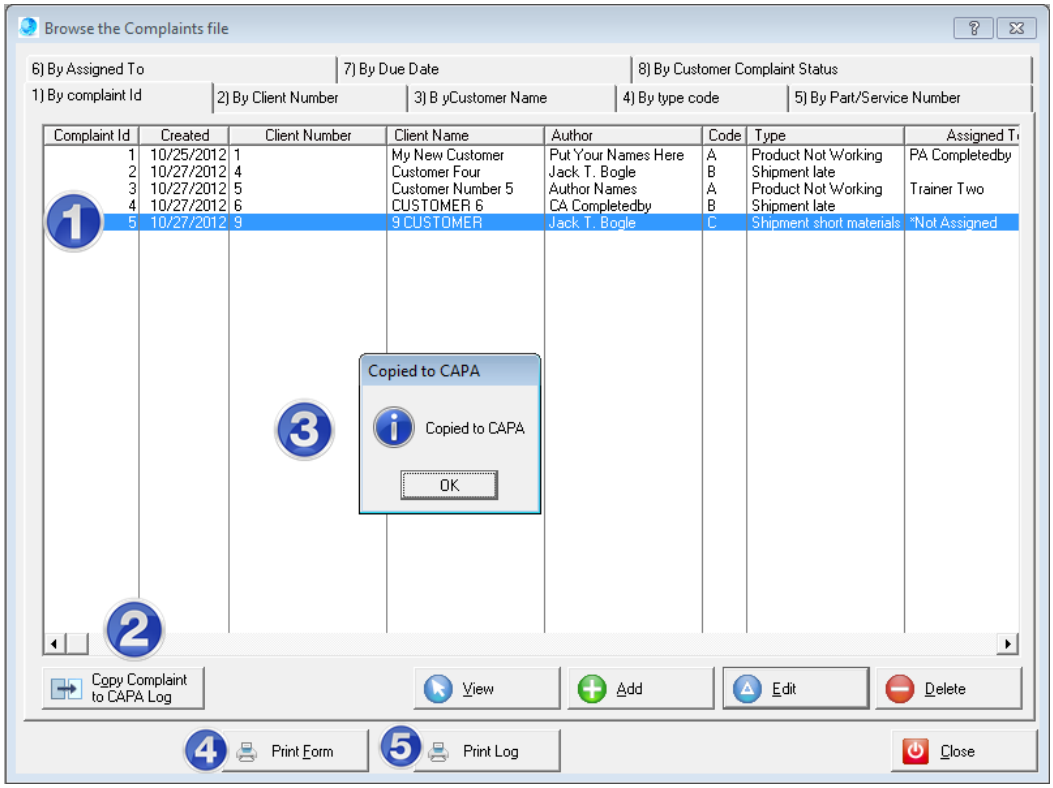
1) To *copy a customer complaint to the CAPA* log highlight the record to be copied.
2) Select the *Copy Complaint to CAPA button*.
3) When the copy has completed the confirmation window will appear. Click the *OK button* to close the window.
4) Use the *Print form button* to print the default complaint form.
5) Use the *Print log button* to print the default complaint log report.



7.2 Customer Complaint Form

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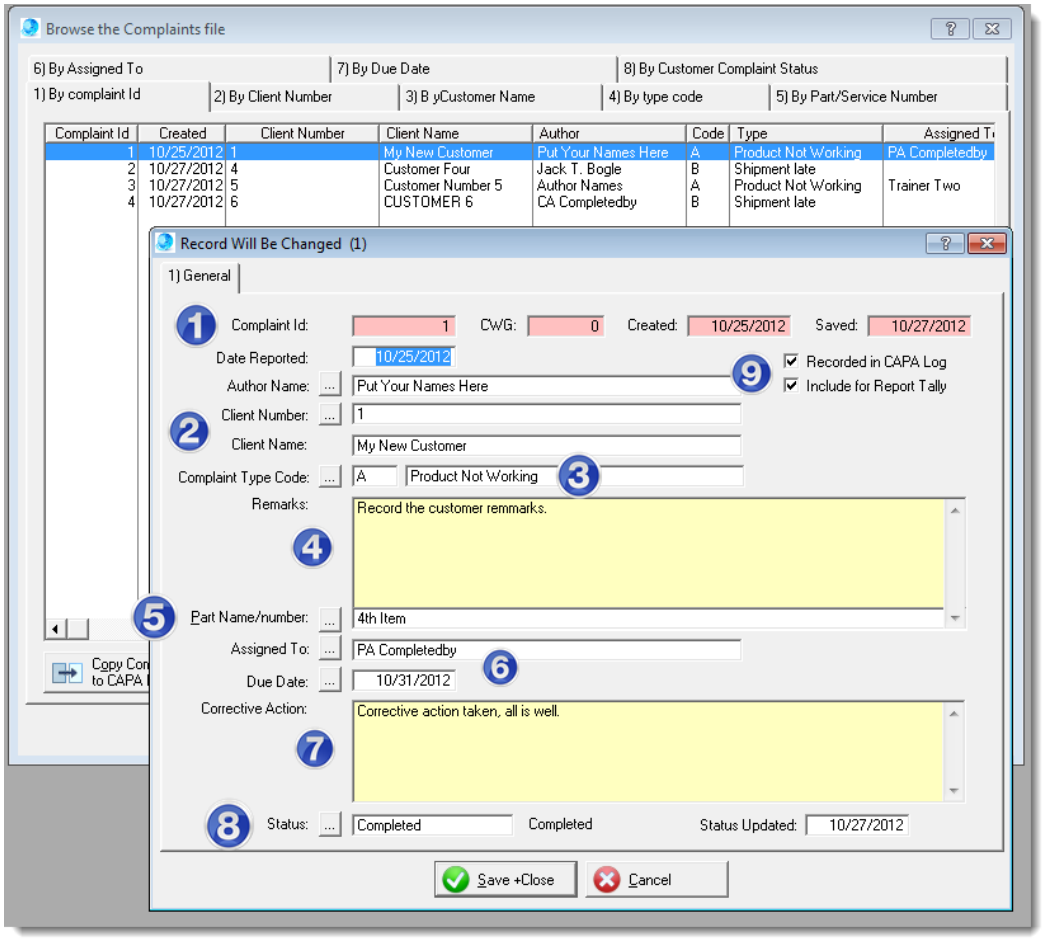
1) The *Complaint Id Number* or *Case Number* is automatically generated.
2) The *Client Number and Client name fields* may be populated by the Customer look-up table .
3) The Complaint Type Code and Description may be populated by the Compliant Type look-up table.
4) Use the *Remarks field* to record important Customer comments.
5) Optionally you may record *part numbers/names.*
6) The complaint may be assigned to others with a target due date.
7) *Corrective Actions* may be recorded in the *Customer Complaint form*.
8) Use the *Complaint Status* and *Status Updated* fields to record the appropriate complaint stats.
9) The [ ] *Recorded in CAPA log checkbox* indicates the Customer Complaint was copied to the CAPA log or entered manually in the CAPA log. Customer complaints may be excluded from the Customer Complaint log report by un-checking [ ] *Include for Report Tally checkbox*.



7.3 Customer Complaint Reports

1) The Customer Complaint reports and forms may be found in the Report Builder and Reports Menu.
2) To *print Customer Complaint reports* and forms select the appropriate report in the table and then click on the Print button.

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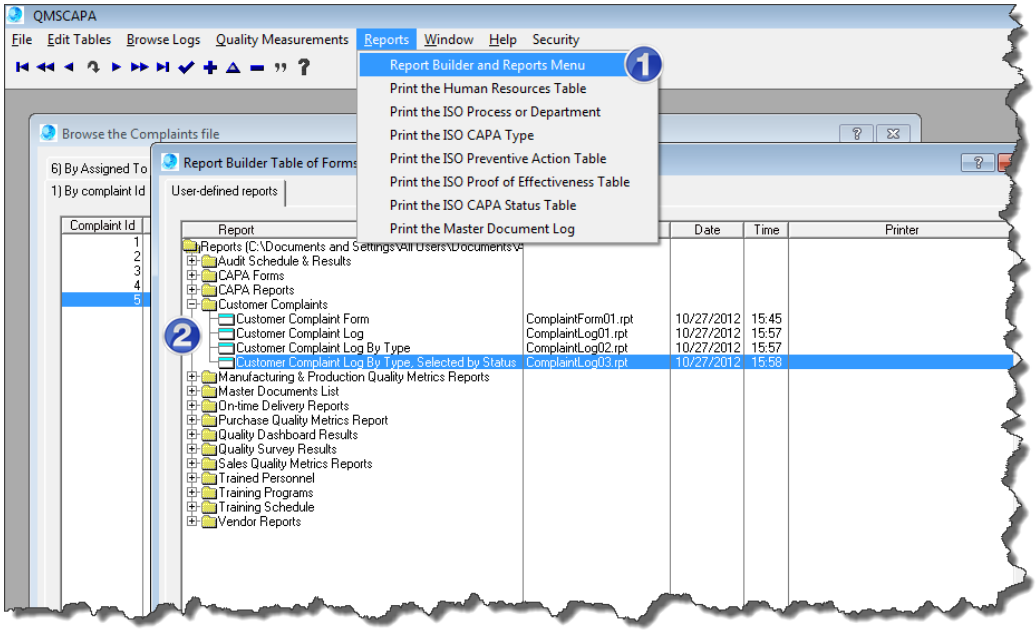

7.3.1 ComplaintLog01.rpt

Customer Complaint Log

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Customer Complaint Log
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Created From: 1/01/2012 Through 12/31/2012
Date Printed: 10/27/2012

Created	Case Id #	Customer Name	Type Code	Complaint Type	Due Date	Assigned	Status
10/25/2012	1	My New Customer	A	Product Not Working	10/31/2012	PA Completedby	Completed
Customer Remarks:	Record the customer remmarks.						
Corrective Actions:	Corrective action taken, all is well.						
10/27/2012	2	Customer Four	B	Shipment late	/ /		
Customer Remarks:	The customer complained about getting the product late.						
Corrective Actions:							
10/27/2012	3	Customer Number 5	A	Product Not Working	/ /	Trainer Two	Open
Customer Remarks:	Add some remarks made by your customer.						
Corrective Actions:							
10/27/2012	4	CUSTOMER 6	B	Shipment late	/ /		Open
Customer Remarks:	Customer was very unhappy.						
Corrective Actions:							
10/27/2012	5	9 CUSTOMER	C	Shipment short materials	/ /	*Not Assigned	Open
Customer Remarks:	Record your customer comments here.						
Corrective Actions:	You can copy and paste information from EMAIL MESSAGES too.						
	Use the F7 Key to check your spelling.						

Total Complaints Logged: 5

7.3.2 ComplaintLog02.rpt

Customer Complaint Log

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Customer Complaint Log By Type
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Created From: 1/01/2012 Through 12/31/2012
Date Printed: 10/27/2012

Created	Case Id #	Customer Name	Type Code	Complaint Type	Due Date	Assigned	Status
Complaint Type A, Product Not Working							
10/25/2012	1	My New Customer	A	Product Not Working	10/31/2012	PA Completedby	Completed
Customer Remarks:	Record the customer remmarks.						
Corrective Actions:	Corrective action taken, all is well.						
10/27/2012	3	Customer Number 5	A	Product Not Working	/ /	Trainer Two	Open
Customer Remarks:	Add some remarks made by your customer.						
Corrective Actions:							
						Subtotal Complaints By Type A: 2	
Complaint Type B, Shipment late							
10/27/2012	2	Customer Four	B	Shipment late	/ /		
Customer Remarks:	The customer complained about getting the product late.						
Corrective Actions:							
10/27/2012	4	CUSTOMER 6	B	Shipment late	/ /		Open
Customer Remarks:	Customer was very unhappy.						
Corrective Actions:							
						Subtotal Complaints By Type B: 2	
Complaint Type C, Shipment short materials							

7.3.3 ComplaintForm01.rpt

Customer Complaint Form

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Customer Complaint Forr
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Date Printed: 10/27/2012

Customer Name	Report Date	Create Date	Due Date	Case Number
9 CUSTOMER	10/27/201:	10/27/201:	/	5

COMPLAINT TYPE: C, Shipment short materials
PART NUMBER: *

CUSTOMER REMARKS: Record your customer comments here.

You can copy and paste information from EMAIL MESSAGES too.

Use the F7 Key to check your spelling.

CORRECTIVE ACTION:

8 Quality Measurements

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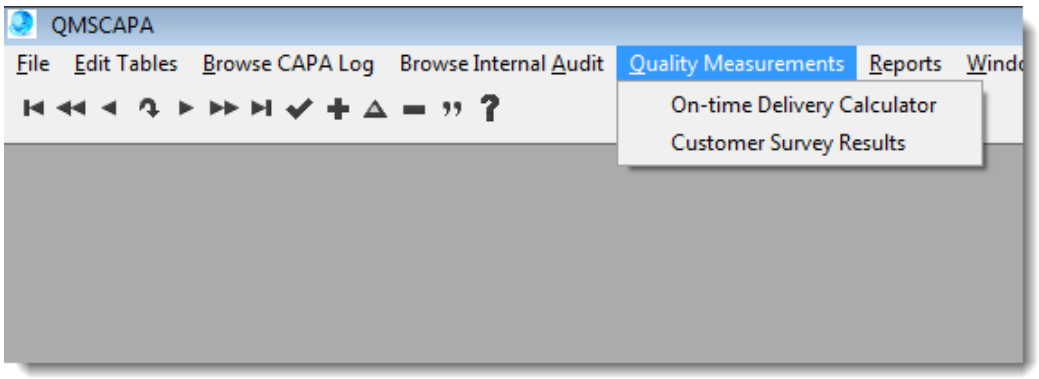

QMSCAPA v1.0.361

QMSCAPA v1.0.48 includes six Quality Measurement tools:

- Customer Survey & Satisfaction Calculator
- On-time Delivery Log & Calculator
- Manufacturing and/or Production Calculator
- Purchasing Quality Calculator
- Sales Quality Calculator
- Dashboard for Quality Monitoring

8.1 Customer Survey & Satisfaction Calculator

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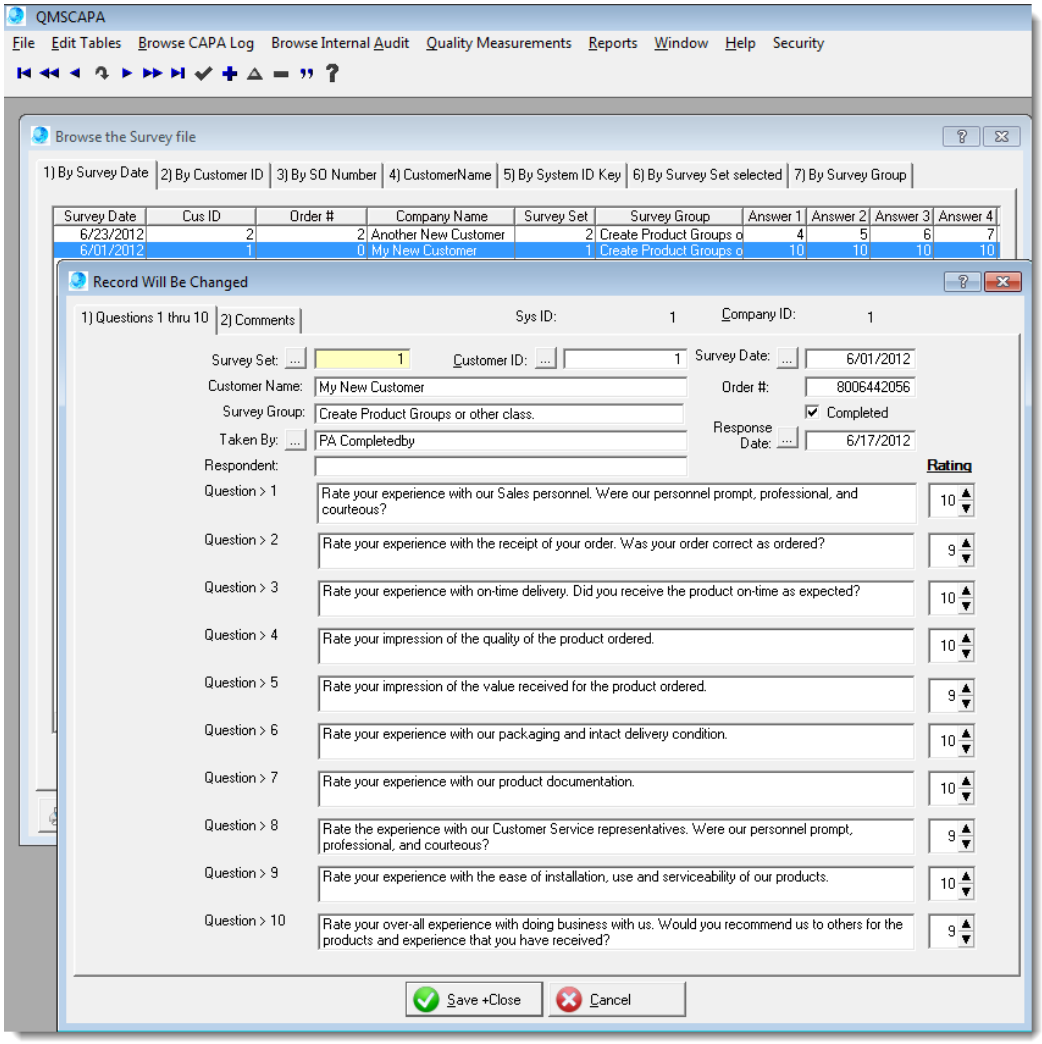
Quality Management Systems

The Customer Survey and Satisfaction Calculator contains:

- A survey log or running table of survey questionnaires that are recorded.
- A Survey Form, which is designed to generate a Survey Questionnaire that can be sent to a customer and capture the results returned by the customer.
- The Survey Questionnaire is designed for 10 rating type questions that are answered on a scale of 1 to 10. Therefore the highest possible score is 100.
- The 10 X 10 Survey can be easily modified or customized for a variety of surveys, including a 5 question and scale of 1 to 5 rating.
- Survey Sets are a collection of Survey questions and our elements of customer satisfaction. The select a Survey Set through the lookup table will populate the question fields in the Survey Form window.
- The [Customer Id field] is a reference to your customer and is linked to

Customer lookup table.

- Survey Groups may be used to designate regions, products and other user defined purposes.
- The ☑ Completed checkbox may be used to signify that the response from the customer has been recorded and completed.
- The numerical spin field limits the rating response to be between 1 and 10.
- The Comments Tab may be used to record customer comments.



8.1.1 Survey Reports

- Survey Form: The report form is designed to be a blank or unscored form for the selected record.
- Selected Survey Results: The report shows the actual customer response

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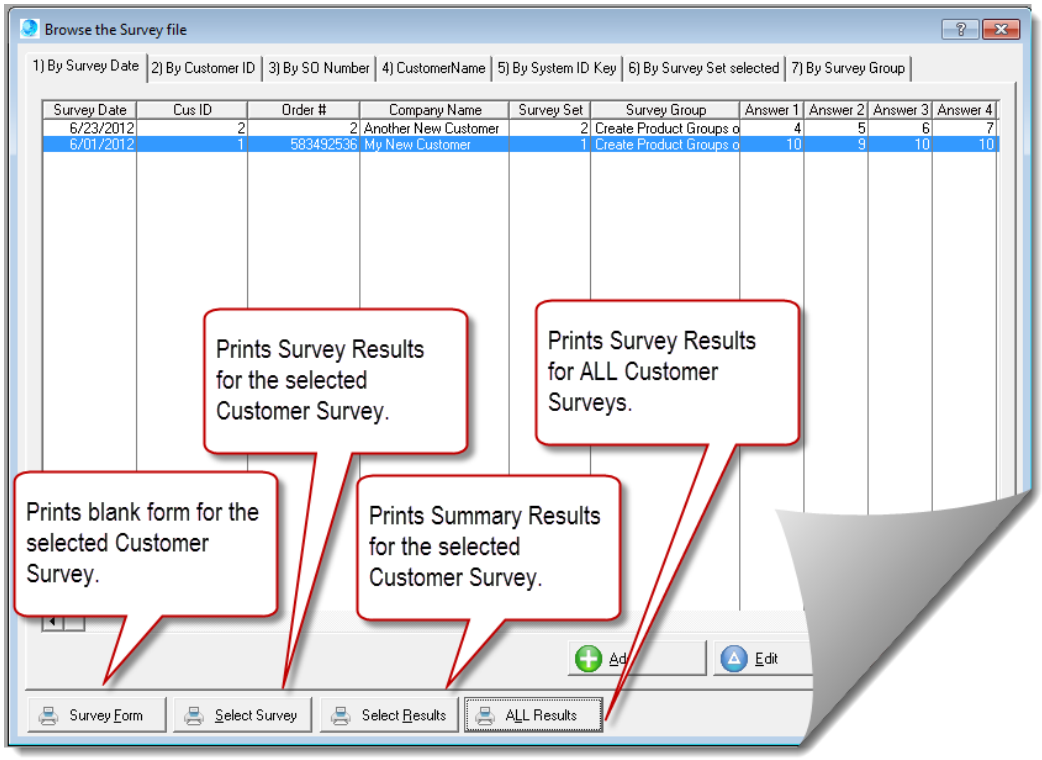
and the survey questions.

- Select Survey Results summary score: The report shows the summary results of the selected survey.
- Survey Summary Results for ALL surveys. The report shows summary of ALL surveys in the table that have been checked as complete.



8.2 Manufacturing and Production Quality Calculator

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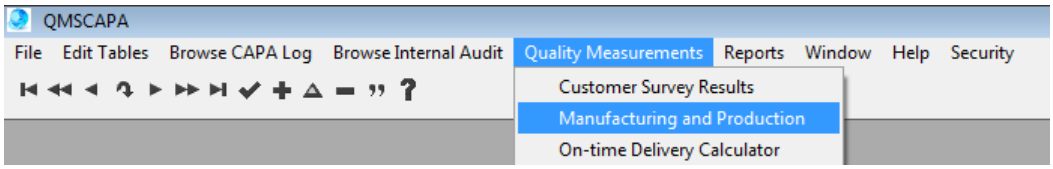
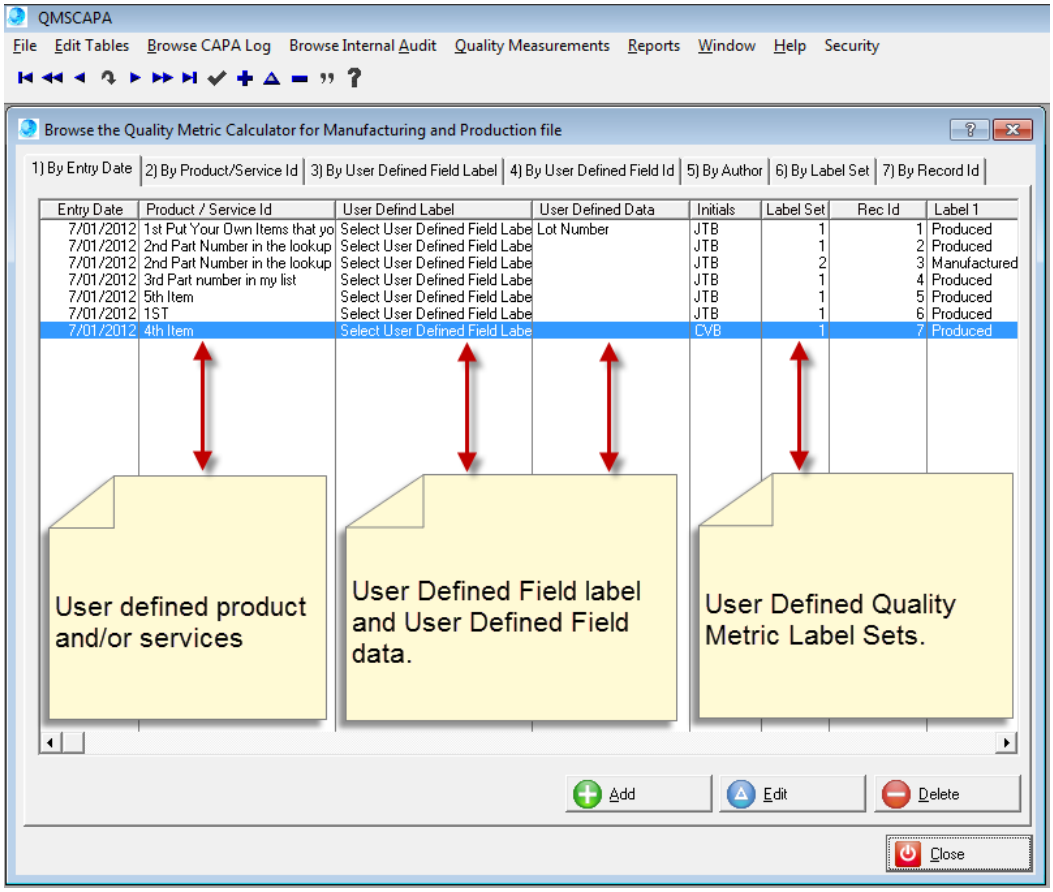
The Manufacturing and Production Quality Calculator contains:

- A Manufactured and/or Production log, and;
- A Mfg. & Production quality calculator form
- Mfg. & Production quality analysis report





8.2.1 Mfg. & Production Calculator Form

1) The Label Set field is linked to a Look-up Table for User Defined Metric Label Sets.
2) The Product or Service Id field is linked to a Look-up Table of User Defined Product and Services.
3) The User Defined Label field and User Defined Data field are linked to Look-up Tables for labels are information.
4) The Metric Label fields (1 -5) are auto-populated by selecting the Label Set.
5) The Add QM Value check boxes are auto-populated by selecting the Label Set.

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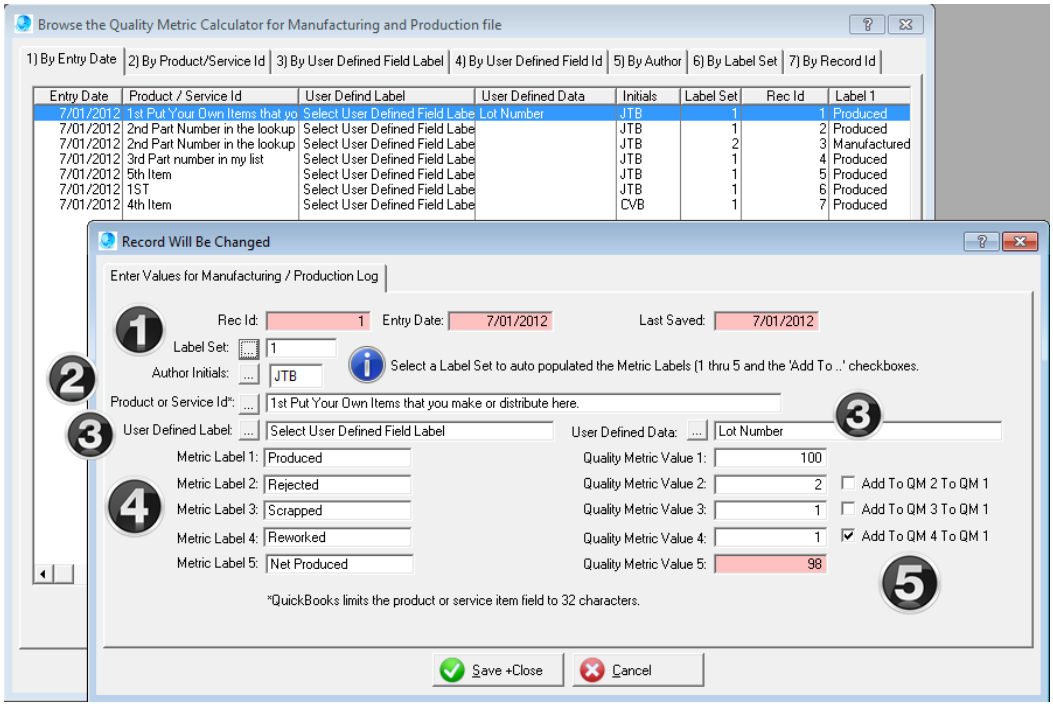
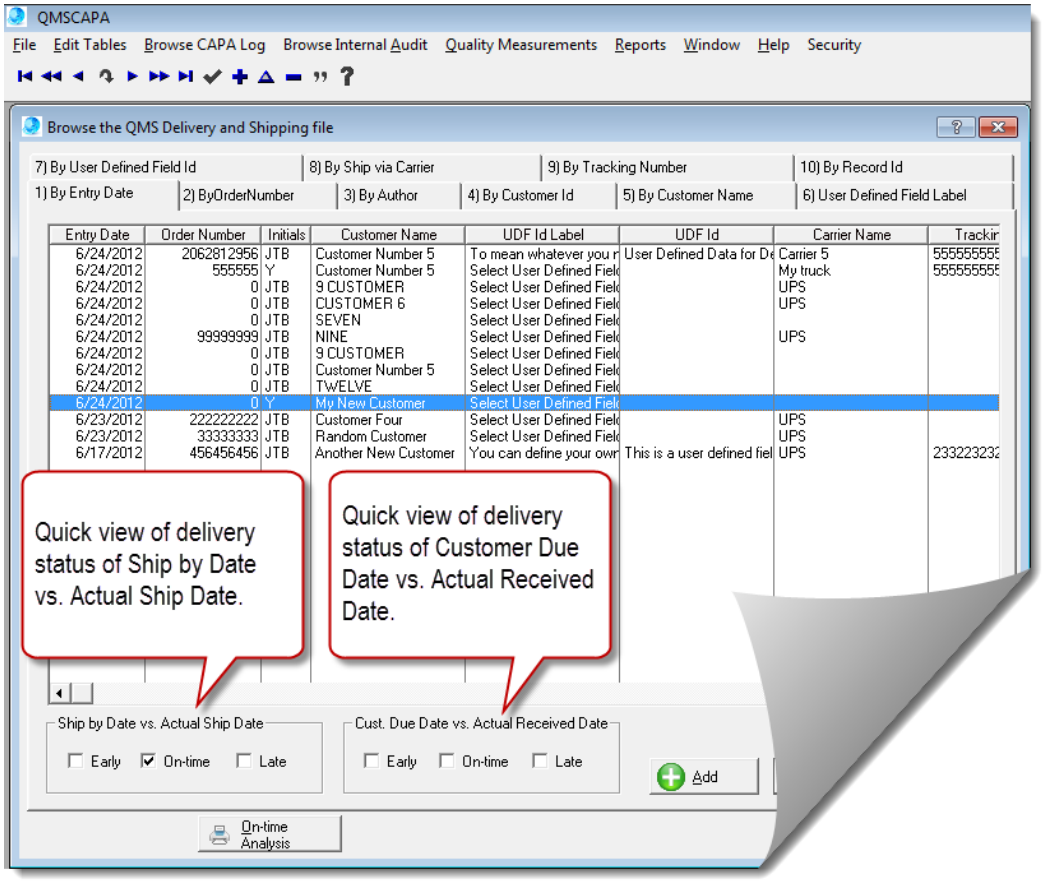


8.3 On-time Delivery Log & Calculator

The On-time Delivery Calculator contains:

- A delivery log table
- An on-time delivery calculator form
- An on-time delivery analysis report

The table below shows a quick view of the delivery status for the highlighted record, which can be early, on-time or late.



8.3.1 On-time Delivery Calculator Form

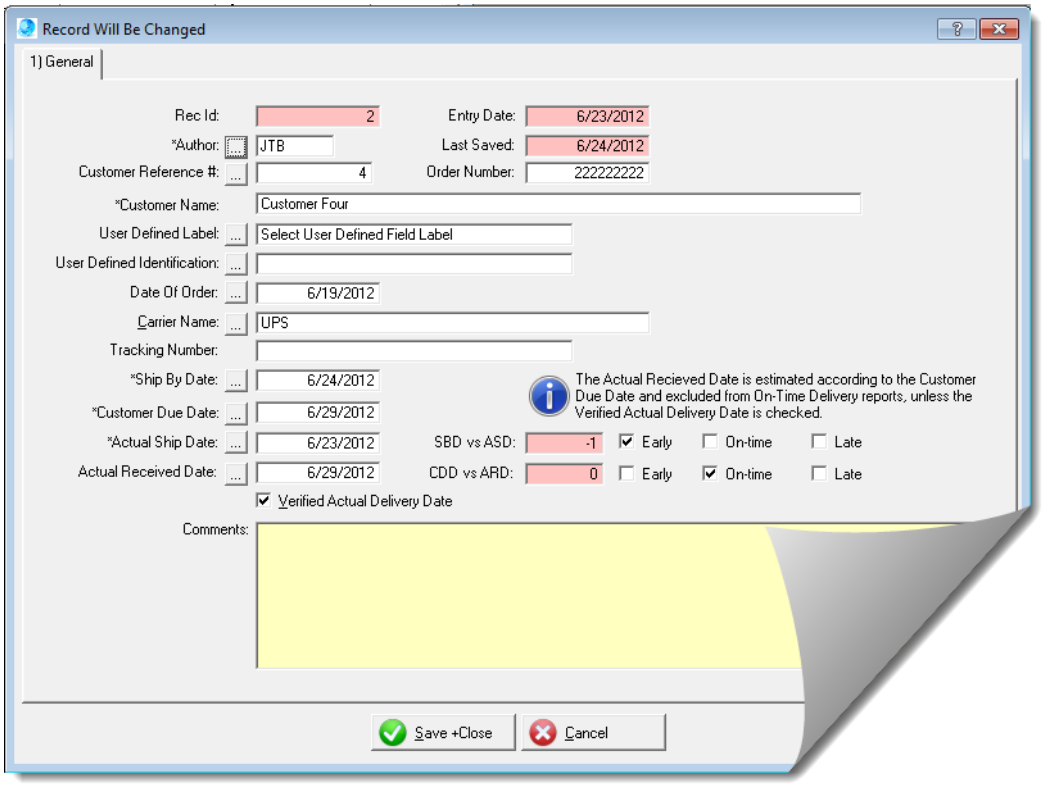
The Calculator Form contains the following features:

- Author lookup table from the Employee file.
- Optional Customer Reference lookup from the Customer file.
- Optional User Defined field label and User Defined data lookup table.
- Optional Shipping Carrier lookup table.

On-time delivery is calculated by two mutually exclusive formulas.

1) The **Ship by Date** is subtracted from the **Actual Ship Date**.
   a) SBD vs. ASD field records the variance as a minus value, zero or a positive value.
   b) A minus value means the delivery was early by a variable quantity of days.
   c) A zero indicates the delivery was on-time.
   d) A positive number indicates the delivery was late by a variable quantity of days.
2) The **Customer Due Date** is subtracted from the **Actual Received Date**.

a) CDD vs. ARD field records the variance as a minus value, zero or a positive value.
b) A minus value means the delivery was early by a variable quantity of days.
c) A zero indicates the delivery was on-time.
d) A positive number indicates the delivery was late by a variable quantity of days.
e) The **Actual Received Date** is estimated by using the **Customer Due Date** and the results are not calculated until the **Actual Received Date** can be verified by checking the **Verified Actual Delivery Date**.

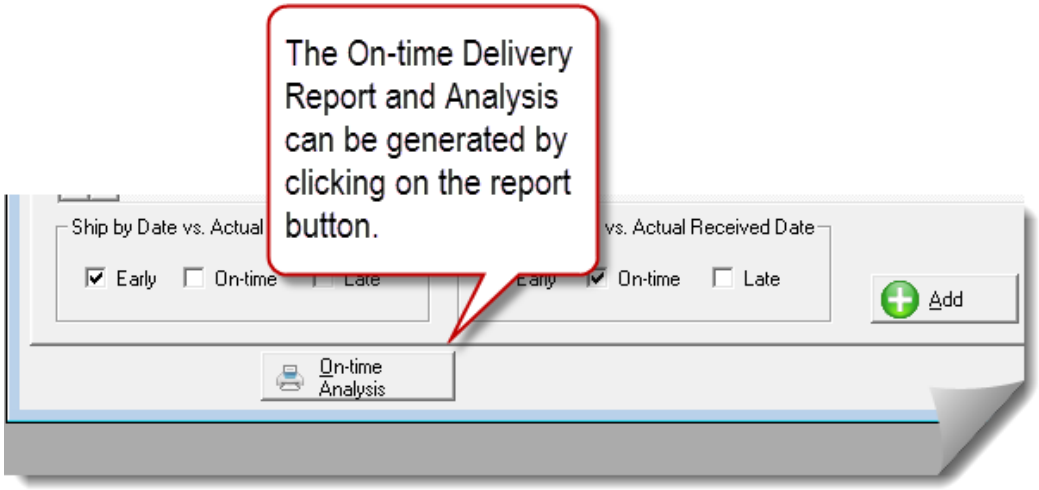


8.3.2 On-time Delivery Analysis Report

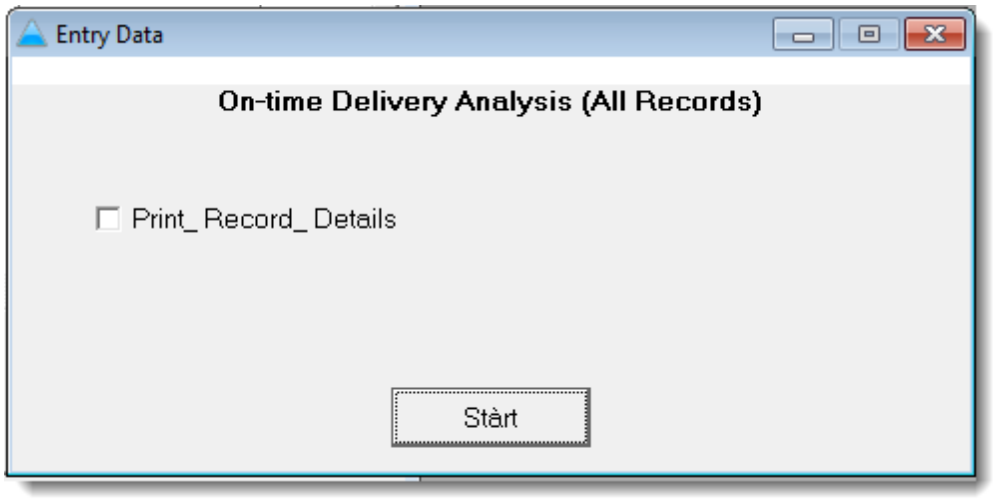
Quality Management Systems

The On-time Delivery Analysis Report shows the results of both on-time delivery formulas.

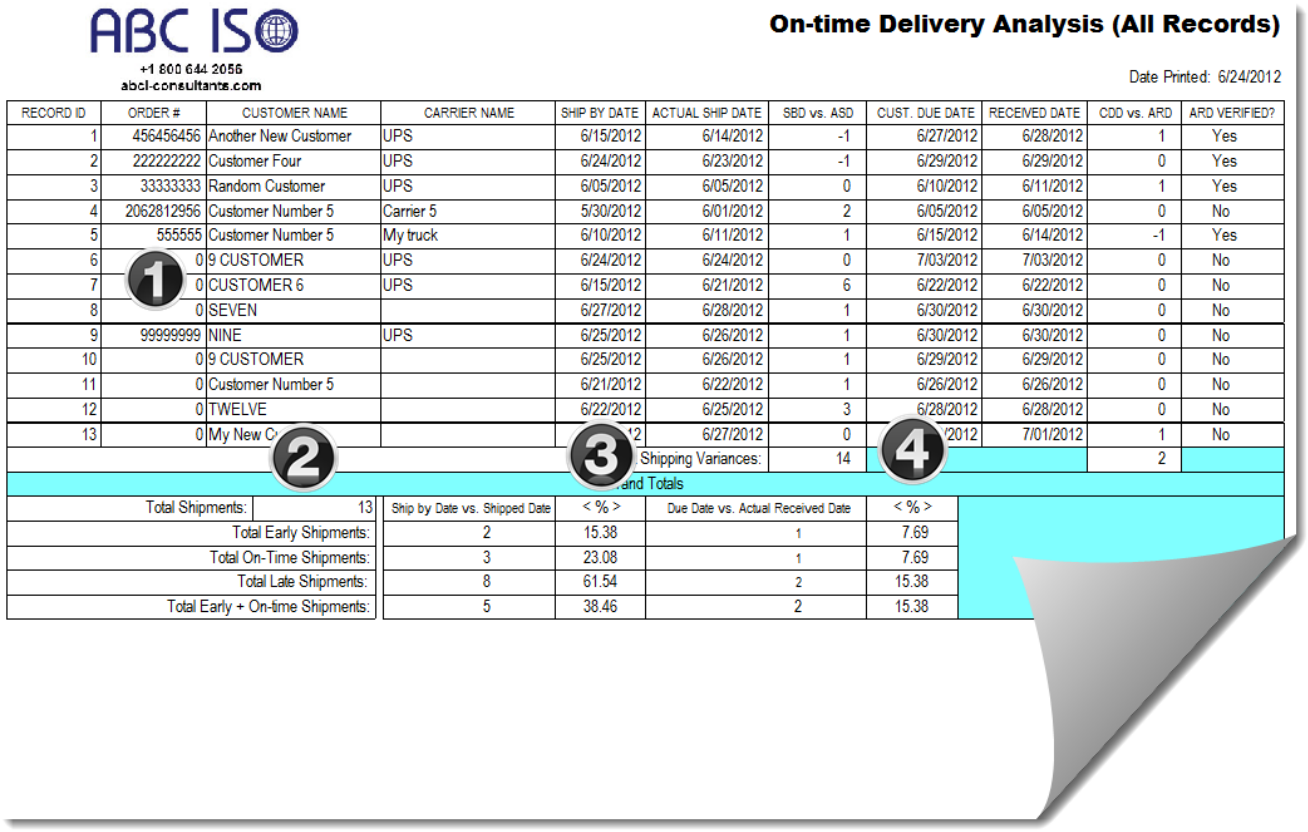
- SBD vs. ASD = Ship by Date is subtracted from the Actual Shipped Date
- CDD vs. ARD = Customer Due Date is subtracted from the Actual Received Date



Optionally you can print a summary analysis or a full shipping log with the analysis.



1) In section 1 below the actual shipping log is displayed.
2) Number 2 shows the Total Shipments in the analysis.
3) Number 3 shows the SBC vs. ASD comparison as percentages for early shipments, on-time shipments and late shipments.
4) Number 4 shows the CDD vs. ARD comparison as percentages for early shipments, on-time shipments and late shipments.



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On-time Delivery Analysis (All Records)

Date Printed: 6/24/2012

RECORD ID	ORDER #	CUSTOMER NAME	CARRIER NAME	SHIP BY DATE	ACTUAL SHIP DATE	SBD vs. ASD	CUST. DUE DATE	RECEIVED DATE	CDD vs. ARD	ARD VERIFIED?
1	456456456	Another New Customer	UPS	6/15/2012	6/14/2012	-1	6/27/2012	6/28/2012	1	Yes
2	222222222	Customer Four	UPS	6/24/2012	6/23/2012	-1	6/29/2012	6/29/2012	0	Yes
3	33333333	Random Customer	UPS	6/05/2012	6/05/2012	0	6/10/2012	6/11/2012	1	Yes
4	2062812956	Customer Number 5	Carrier 5	5/30/2012	6/01/2012	2	6/05/2012	6/05/2012	0	No
5	555555	Customer Number 5	My truck	6/10/2012	6/11/2012	1	6/15/2012	6/14/2012	-1	Yes
6	0	9 CUSTOMER	UPS	6/24/2012	6/24/2012	0	7/03/2012	7/03/2012	0	No
7	0	CUSTOMER 6	UPS	6/15/2012	6/21/2012	6	6/22/2012	6/22/2012	0	No
8	0	SEVEN		6/27/2012	6/28/2012	1	6/30/2012	6/30/2012	0	No
9	99999999	NINE	UPS	6/25/2012	6/26/2012	1	6/30/2012	6/30/2012	0	No
10	0	9 CUSTOMER		6/25/2012	6/26/2012	1	6/29/2012	6/29/2012	0	No
11	0	Customer Number 5		6/21/2012	6/22/2012	1	6/26/2012	6/26/2012	0	No
12	0	TWELVE		6/22/2012	6/25/2012	3	6/28/2012	6/28/2012	0	No
13	0	My New C		[illegible]12	6/27/2012	0	[illegible]/2012	7/01/2012	1	No
					Shipping Variances:	14			2	

[illegible]and Totals

		Ship by Date vs. Shipped Date	< % >	Due Date vs. Actual Received Date	< % >
Total Shipments:	13				
Total Early Shipments:		2	15.38	1	7.69
Total On-Time Shipments:		3	23.08	1	7.69
Total Late Shipments:		8	61.54	2	15.38
Total Early + On-time Shipments:		5	38.46	2	15.38

8.4 Purchasing Quality Metrics Calculator

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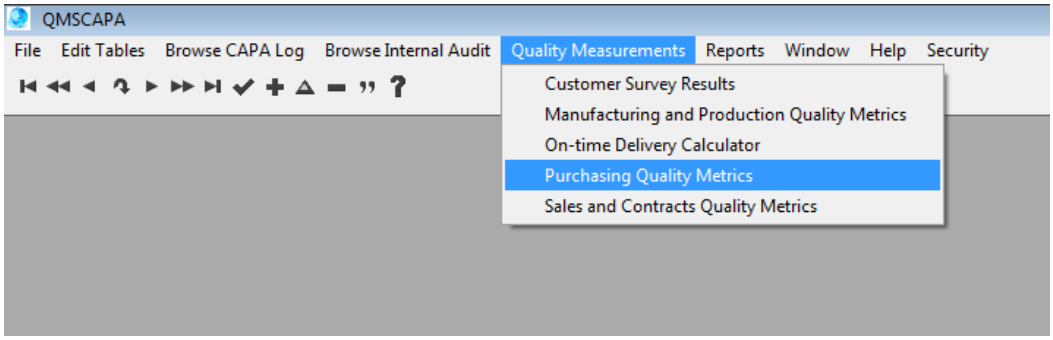
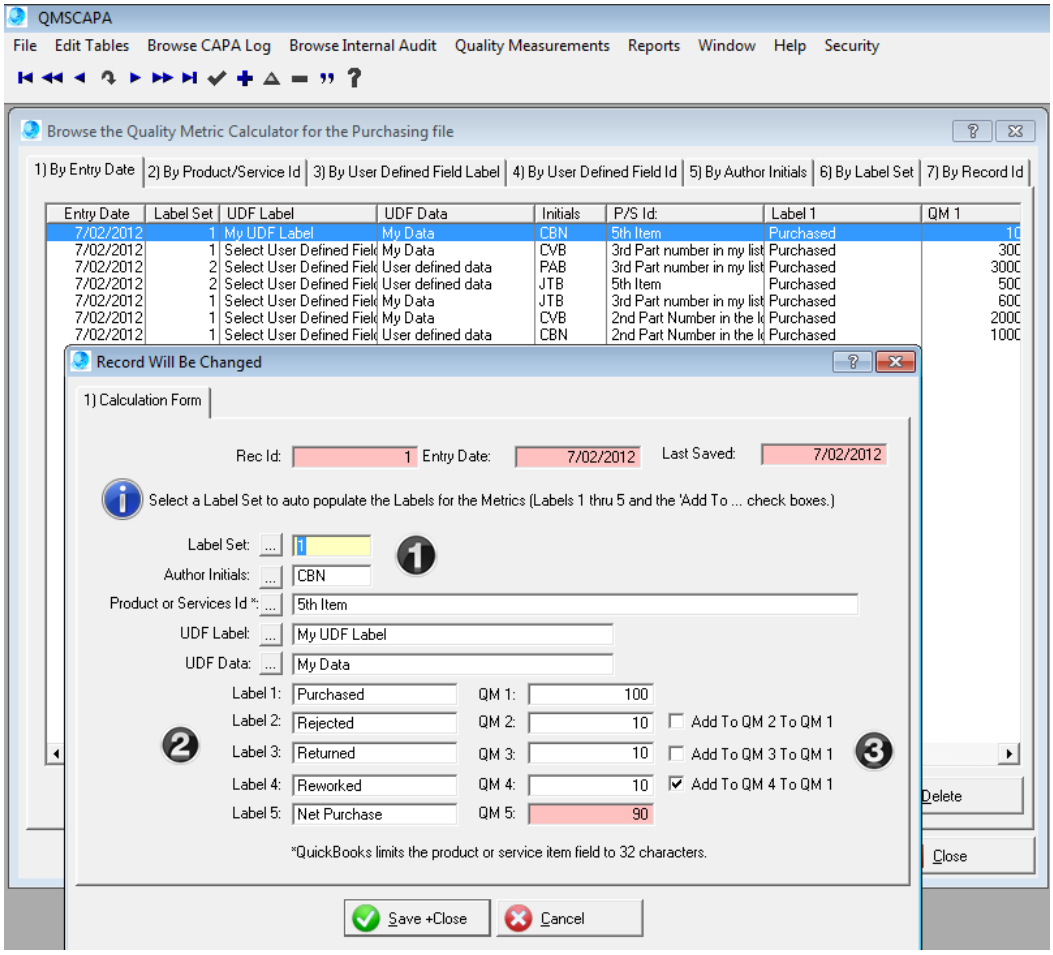
The Purchasing Quality Metrics Calculator consist of:

1) A browse table and log of Purchasing activities.
2) A calculator form for recording Purchases.
3) An analysis report for Purchasing Quality Metrics.





1) Set a Label Set to auto-populate the Metrics Labels (labels 1 through 5 and the 'Add To ... check boxes.')
2) The metrics labels are user defined and controlled by the Label Set look-up table.
3) By default the values of QM2, QM3 and QM4 are subtracted from QM1. Optionally the values of QM2, QM3 and QM4 may be added to QM1 if the check boxes are checked ☑.
4) The ☑ boxes are read only on the Purchasing Quality Calculator form and controlled by the Metrics Label Set look-up table

8.5 Sales Quality Metrics Calculator

The **Sales Quality Metrics Calculator** consist of:

1) A browse table and log of Sales activities.
2) A calculator form for recording Sales.
3) An analysis report for Sales Quality Metrics.

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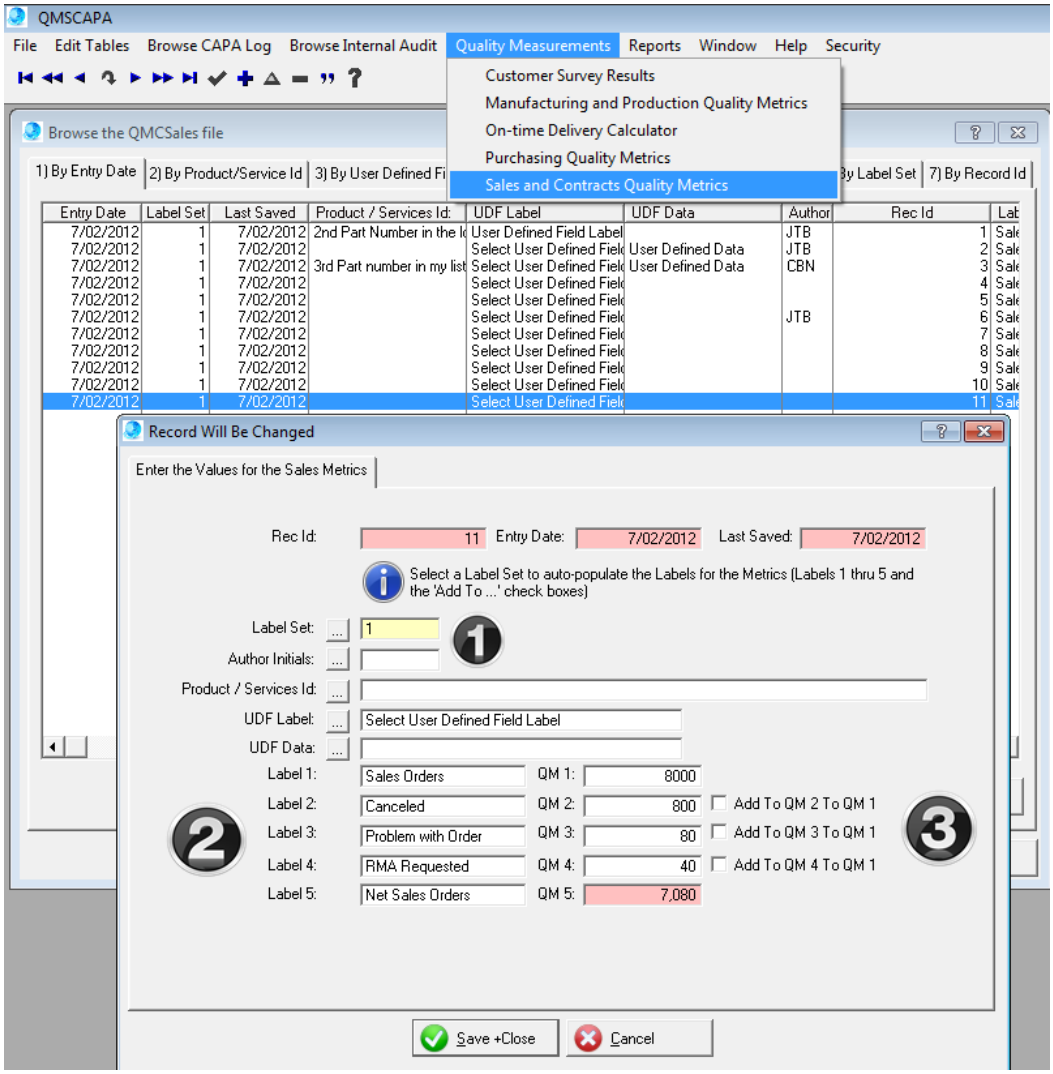

1) Set a Label Set to auto-populate the Metrics Labels (labels 1 through 5 and the 'Add To ... check boxes.')
2) The metrics labels are user defined and controlled by the Label Set look-up table.
3) By default the values of QM2, QM3 and QM4 are subtracted from QM1. Optionally the values of QM2, QM3 and QM4 may be added to QM1 if the check boxes are checked ☑.
4) The ☑ boxes are read only on the Sales Quality Calculator form and controlled by the Metrics Label Set look-up table

9 Dashboard for Monitoring Quality

The QMSCAPA Dashboard for Monitoring Quality accumulates all of the quality measurements that are recorded in QMSCAPA.

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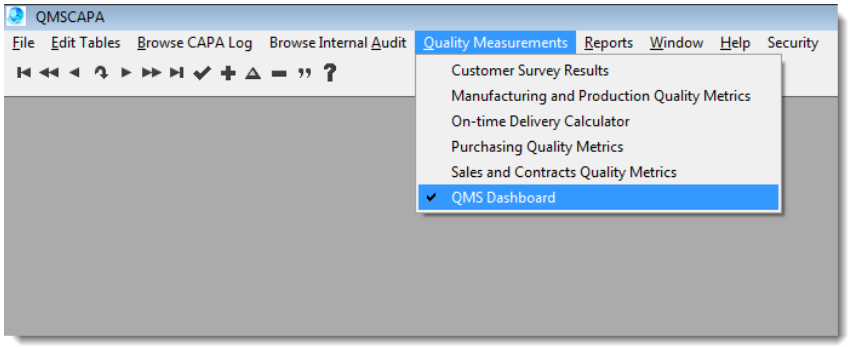
The **QMS Dashboard** consists of: consultants.com

- ✓ The QMS Dashboard table, which is designed to capture quality measurements over a period of time. You can accumulate quality measurements on user-defined intervals. For example, you can record quality measurements monthly, quarterly, semi-annually or annually, among others.
- ✓ The QMS Dashboard form is a quality measurement calculator that provides a roll-up of data according to a user-defined date range.
- ✓ Any QMS Dashboard data can be easily printed simply by selecting the appropriate dashboard record in the QMS Dashboard Table.
- ✓ The QMS Dashboard may be configured according to user-defined settings in the Dashboard Label Sets.

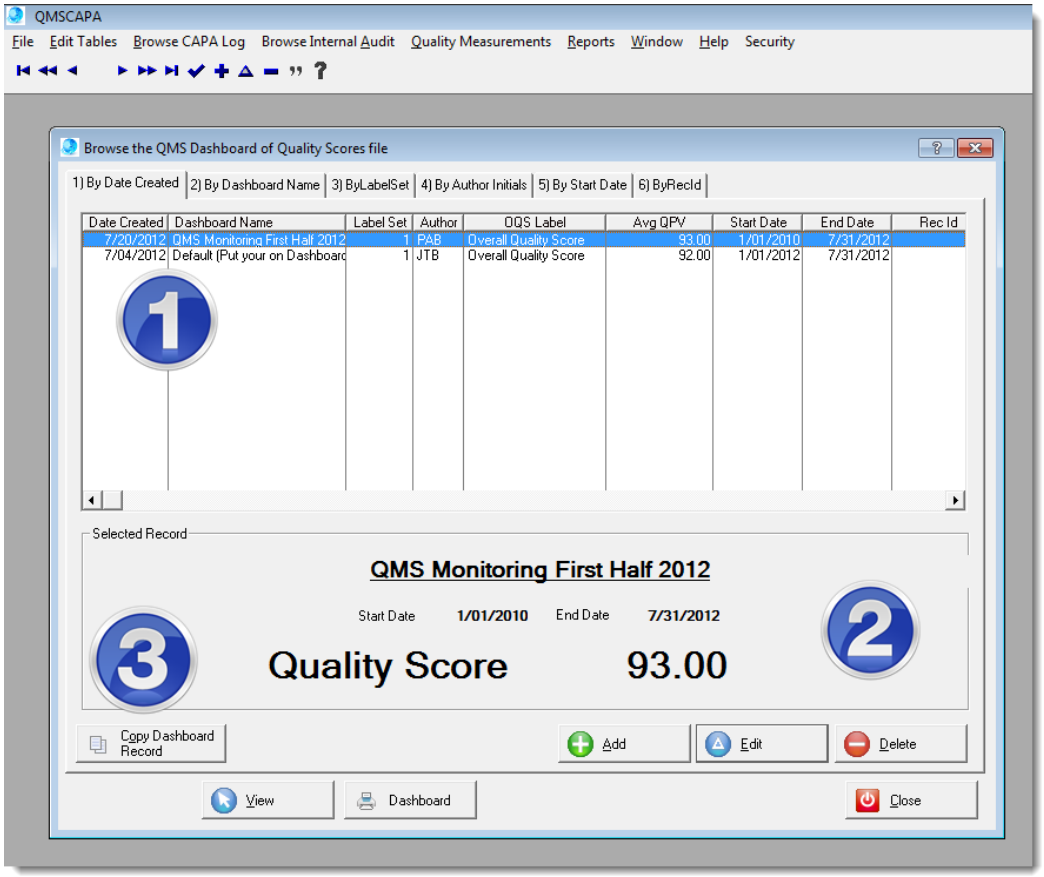


9.1 QMS Dashboard Table

Quality Management Systems

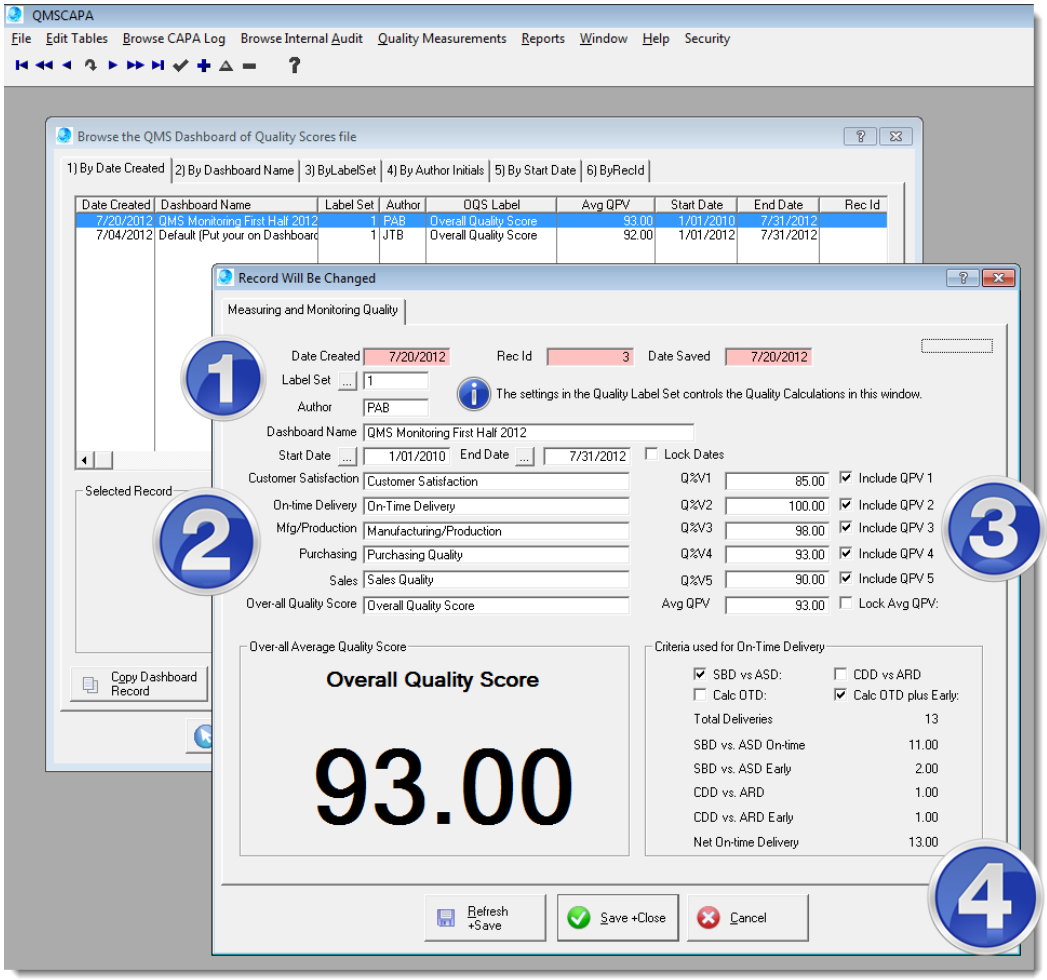
The Dashboard Table displays the Dashboard data in descending order by the 'Date Created'.

1. The lower portion of the window display shows a snap shot of the highlighted Dashboard record.
2. The Copy Dashboard Record button provides an easy means to copy an existing record. For example, you may need to create a Quality Monitoring record for the first quarter and later copy the first quarter for the second quarter and then only change the date range for the quality measurements.



9.2 QMS Dashboard Form & Calculator

Quality Management Systems



1) Choose a Label Set, which automatically populates the dashboard labels, the 'include QPV' settings, and the criteria for calculating on-time delivery settings.

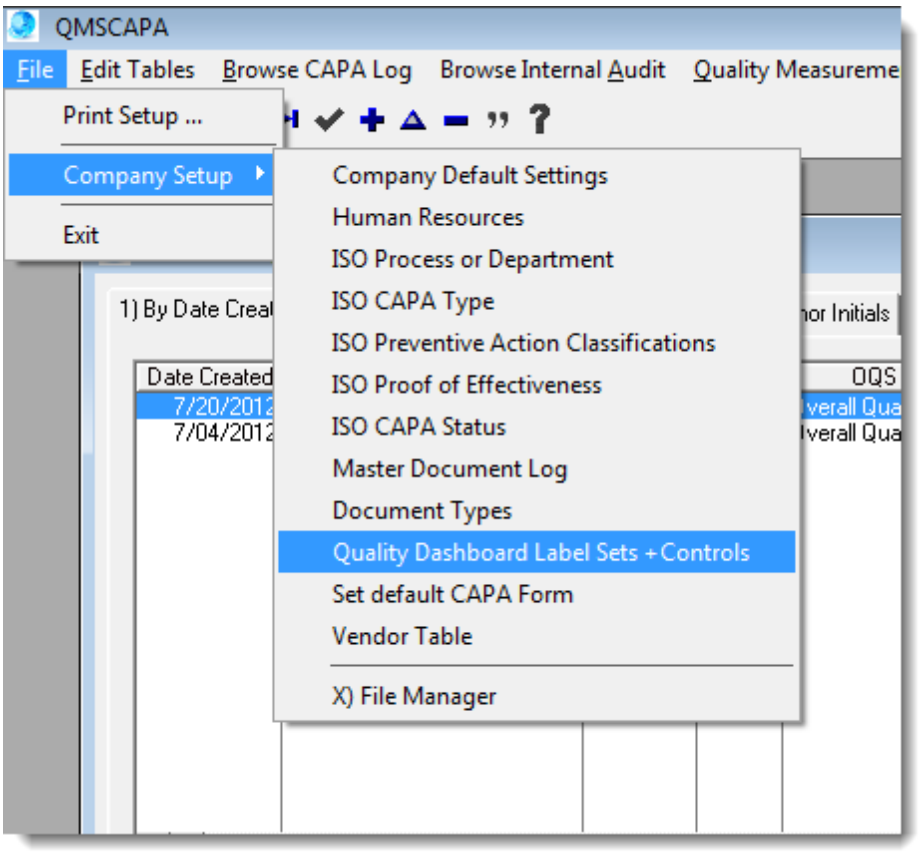
2) The end-user can change the Labels on the Dashboard but not the formula of what must be calculated. The Q%V1, which means Quality Percentage Value # 1, always calculates Customer Satisfaction. Q%V2 always calculates on-time delivery. Q%V3 always calculates Mfg/Production quality. Q%V4 always calculates Purchasing quality. Q%V5 always calculates Sales quality.

3) Using the settings on the **Dashboard Label Sets** form window an end-user can select which quality metrics should be included on the dashboard.

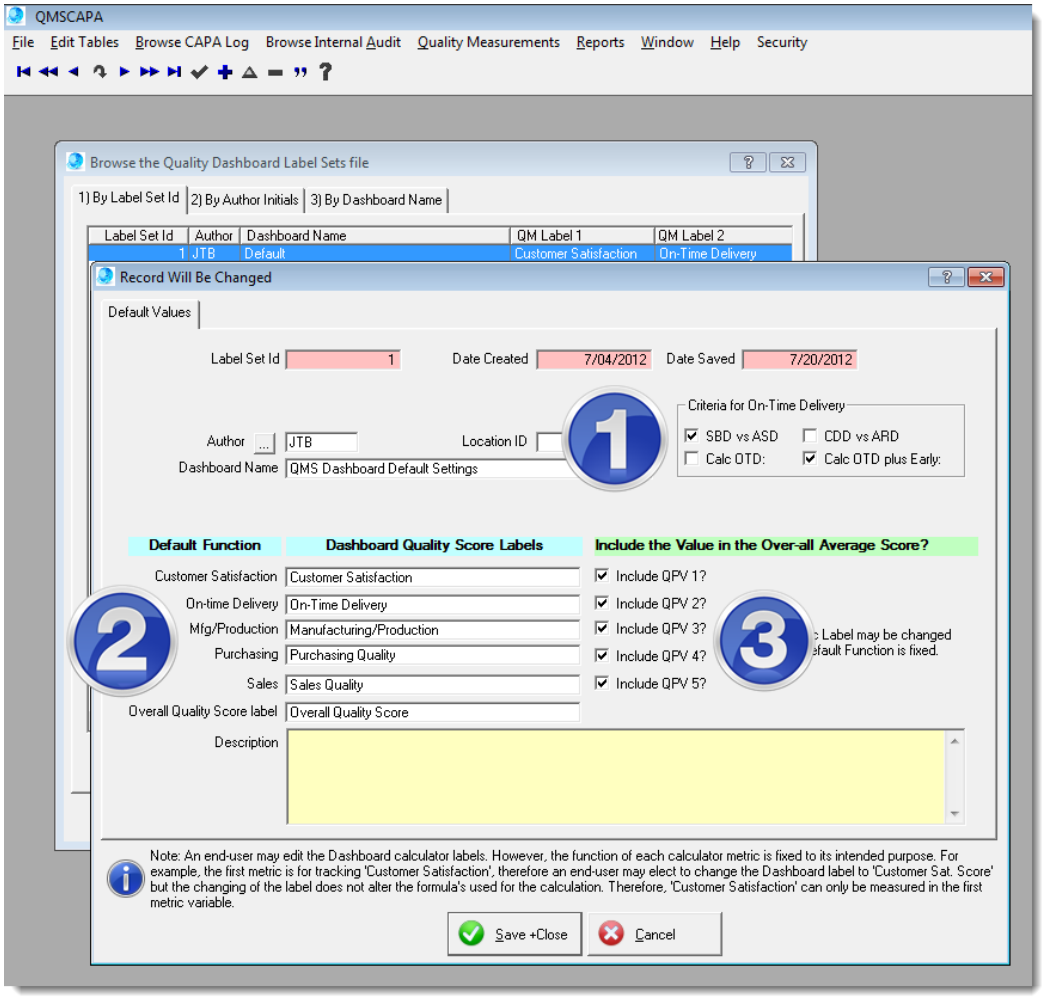
4) Also, the criteria or formula for calculating on-time delivery is controlled by the **Dashboard Label Set** selected.

9.3 QMS Dashboard Label Sets

Quality Management Systems



The QMS Dashboard Label Sets may be accessed from the File menu > Company Setup option menu.



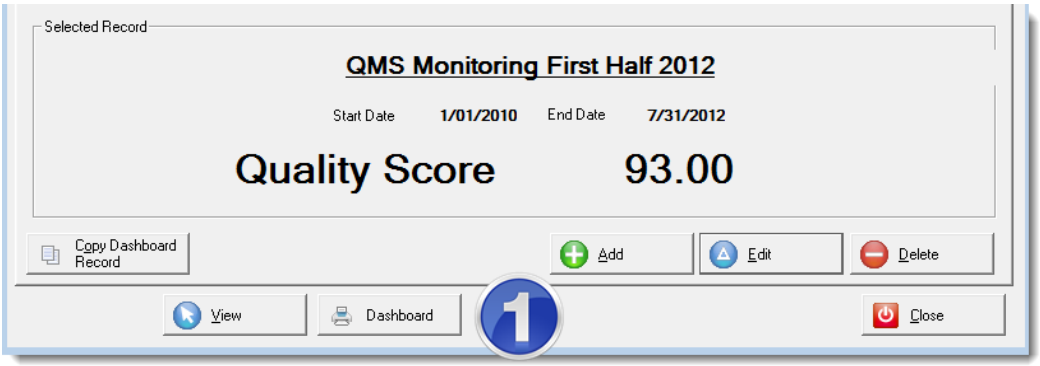
1) Criteria for On-Time Delivery controls the formula of how on-time delivery is calculated on the Dashboard.
    - The check box SBD vs ASD means to calculate on-time delivery according to the Ship by Date (SBD) compared to the Actual Ship Date (ASD).
    - The check box CDD vs ARD means to calculate on-time delivery according to the Customer Due Date (CDD) compared to the Actual Received Date (ARD).
    - The check box Calc OTD means to only calculate the deliveries that were on-time and not early.
    - The check box Calc OTD plus Early means to calculate the deliveries that were on-time, plus add the deliveries that were early.

2) An end-user may edit the Dashboard calculator labels. However, the function of each calculator metric is fixed and may not be changed from its intended purpose.

3) The check boxes with 'Include QPV # ...' determine whether or not the metric should be calculated on the Dashboard.

9.4 QMS Dashboard Report

Quality Management Systems



1) The **Dashboard print button** may be used to print the highlighted or selected record in the QMS Dashboard report (sample shown below).

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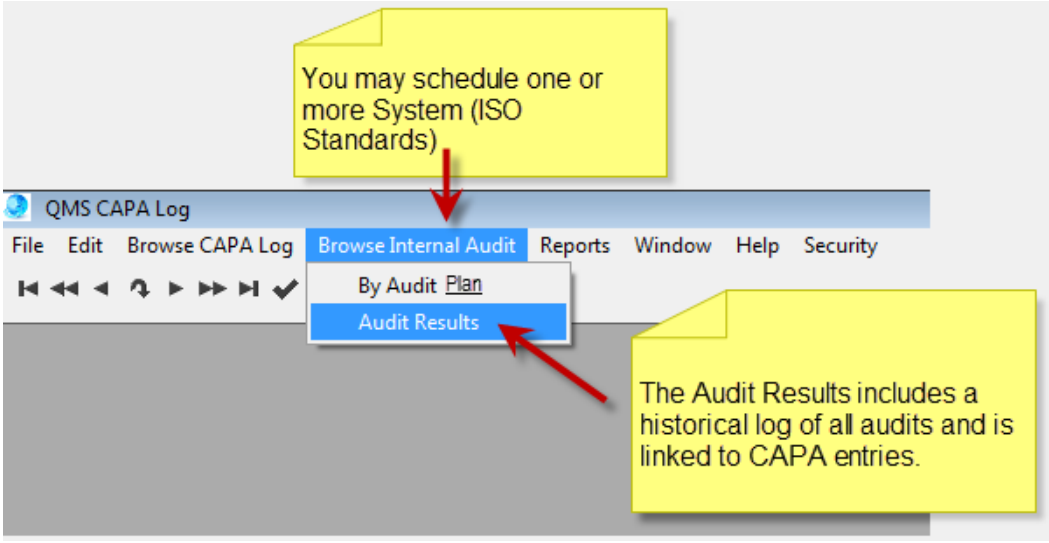
Quality Dashboard Result

Date Printed: 7/20/2012

QMS Monitoring First Half 2012				
Report Id Number:	3	Label Set:	1	Quality Score = 93
Start Date:	1/01/2010	End Date:	7/31/2012	
Author:	PAB	Create Date:	7/20/2012	
Customer Satisfaction				85.00
On-Time Delivery				100.00
Manufacturing/Production				98.00
Purchasing Quality				93.00
Sales Quality				90.00
Overall Quality Score				93.00

10 Internal Auditing for Quality



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QMSCAPA can support the **Internal Audit Plan** of one or more Systems (ISO Standards).

Each **element** may have one or more **auditor records**, or entries into the **audit log or Audit Results table.**

Related Topics

- Audit Plans
- Audit Plan Relationships to Audit Elements (or Processes) and Audit Results
- Audit Plan File Relationships
- Audit Schedule

10.1 Audit Plans

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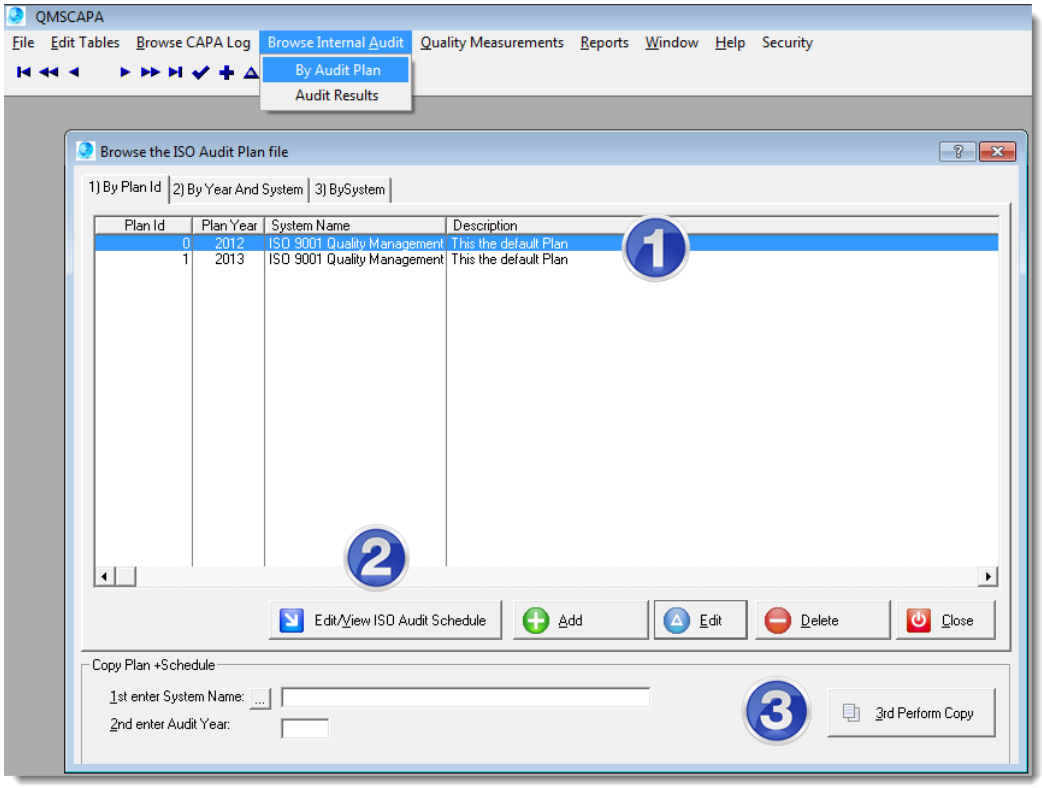
Audit Plans are the top level of Audit Schedules, which provides a process of grouping Audit Schedule elements into a single Standard and, or Year. Therefore, if an Audit Plan is copied then all of the Audit Schedule records are copied into a new Audit Plan.

1) In the image below, Section (1) shows a browse table of Audit Plans.
2) Section (2) refers to the button [Edit/View ISO Audit Schedule], which opens to the detailed Audit Schedule.
3) Section (3) displays the step that are needed to *make a copy of an Audit Plan* and Audit Schedule.

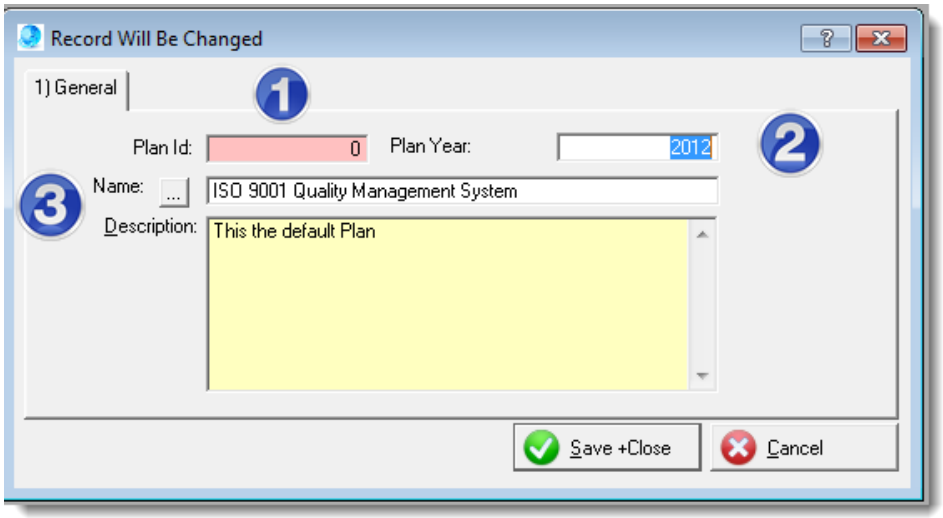
To *copy an Audit Schedule*:

1. In Section (1) of the image below highlight the Audit Plan that you intend to copy.
2. Enter the appropriate System name that you wish to appear in the new Audit Plan and Schedule.
3. Enter the year for the new Audit Plan and Schedule
4. Click on the button [3rd Perform Copy].



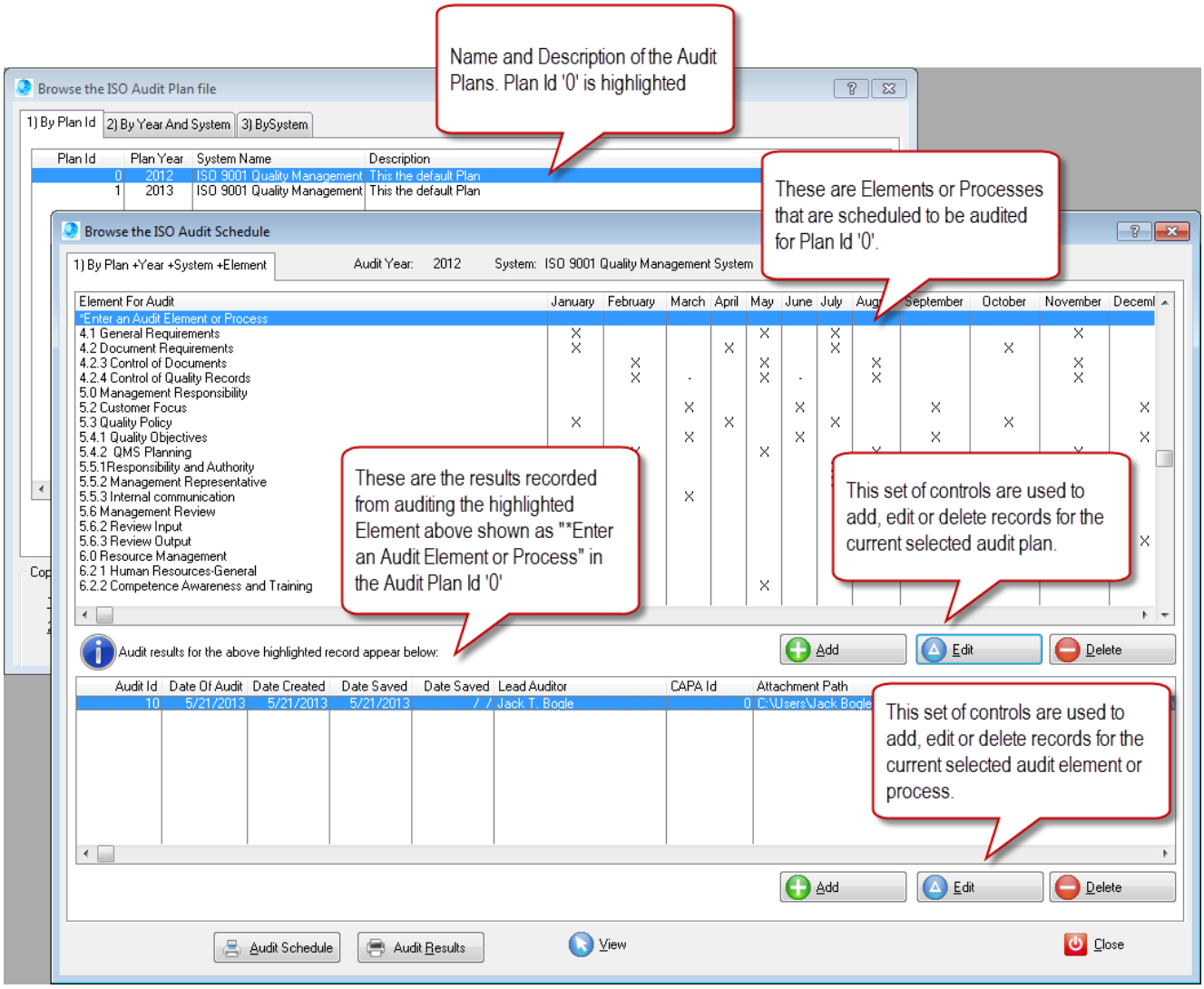
Audit Plan Window Form

1) The Plan Id field is automatically numbered.
2) The Plan Year may be edited when an *Audit Plan is Copied* for a following year.
3) Use the Name & Description field to describe the Audit Plan.

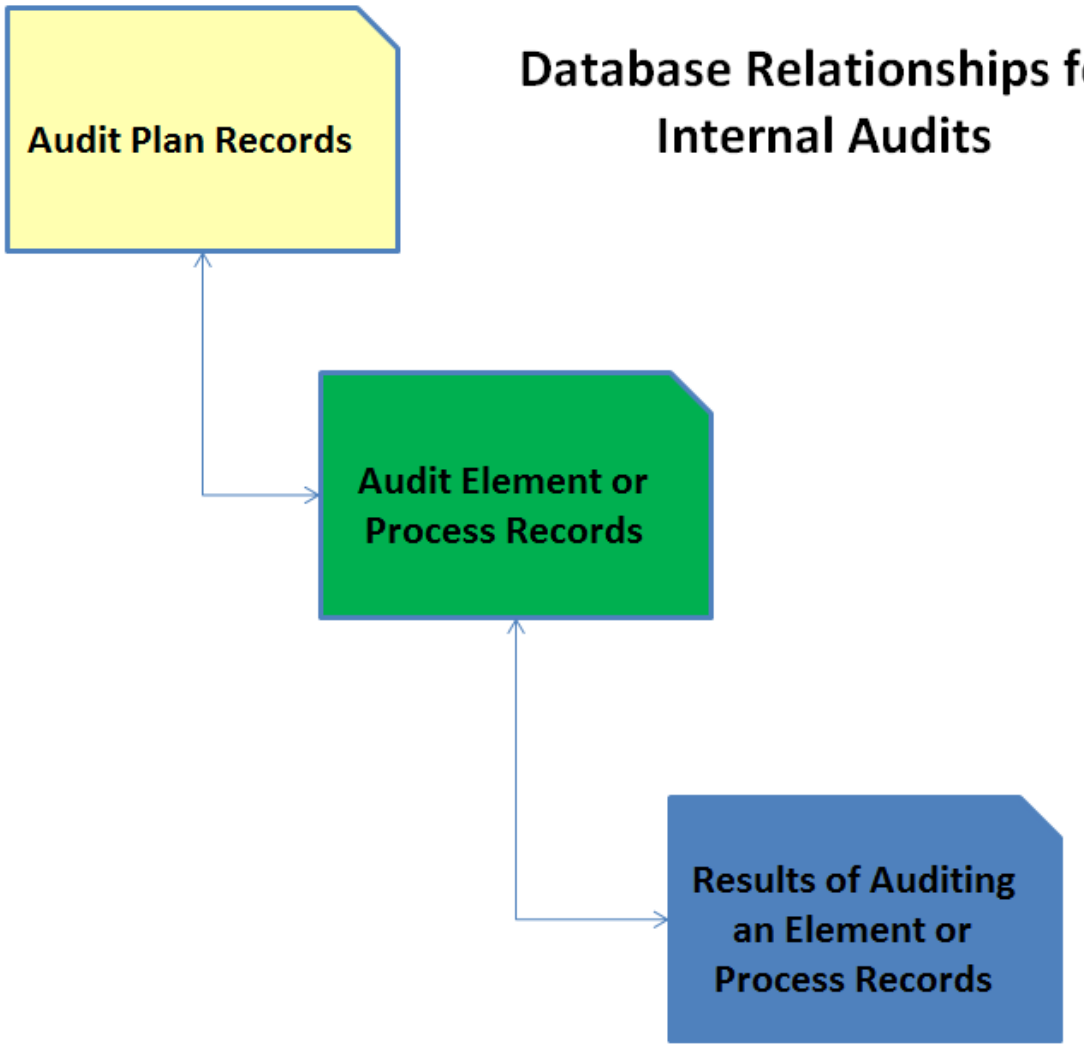


10.1.1 Audit Plan Relationships to Elements & Audit Results

The image below shows the relations ship of the Audit Plan to the Audit Elements (or Processes) and the Audit Results that are directly linked to the Audit Element.



10.1.2 Audit Plan File Relationships



The Database File Structure provides support for:

- Unlimited Audit Plans
  - Unlimited Audit Elements or Processes per Audit Plan
    - Unlimited Audit Results per Audit Element or Process

10.2 Audit Schedule

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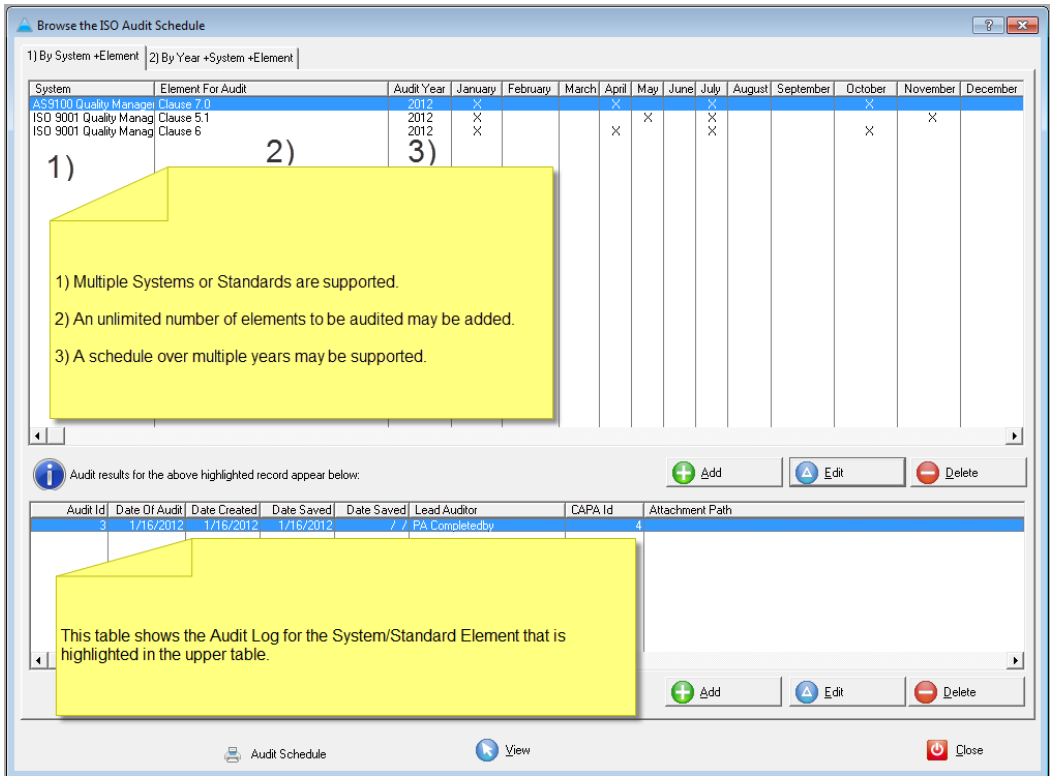
1) Multiple Systems or Standards are supported.
2) An unlimited number of elements to be audited may be added.
3) A schedule over multiple years is supported.



The window image above shows the **Audit Schedule** in the upper table and the **Audit Log** in the lower table.

10.2.1 Audit Schedule Printing Options

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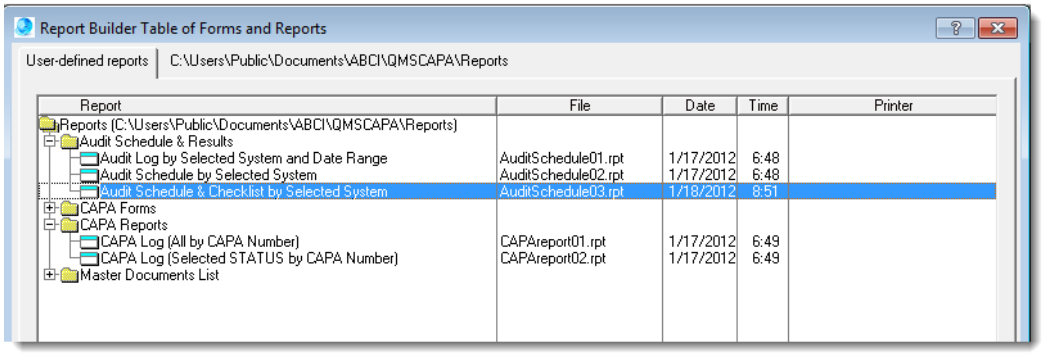
Additional Audit Schedule Printing Options may be found in the Report Builder Table.



10.2.2 On Screen Audit Schedule

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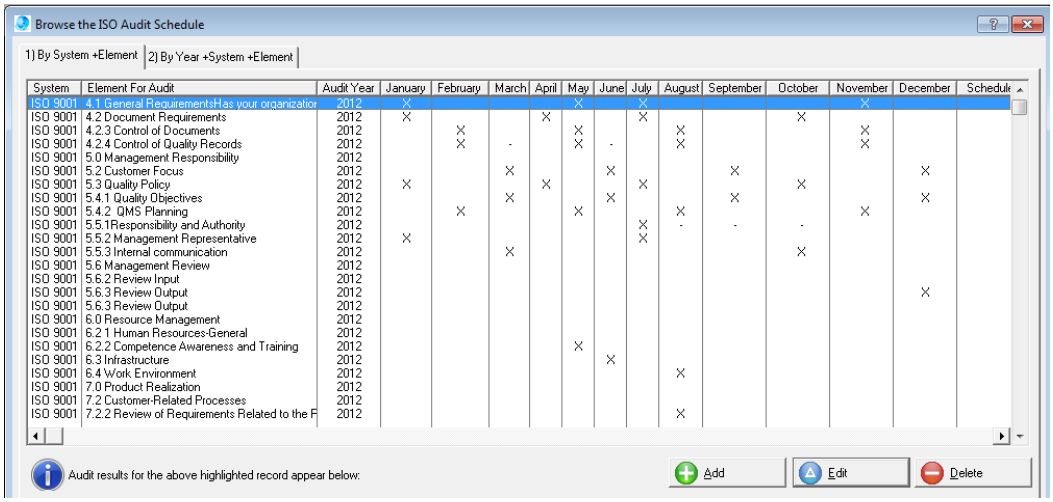
The **on screen audit schedule** shows the System, Element, Audit Year and Audit Month.

You may enter Processes to be audited and the Clauses to various Standards.



10.2.3 On Screen Audit Results

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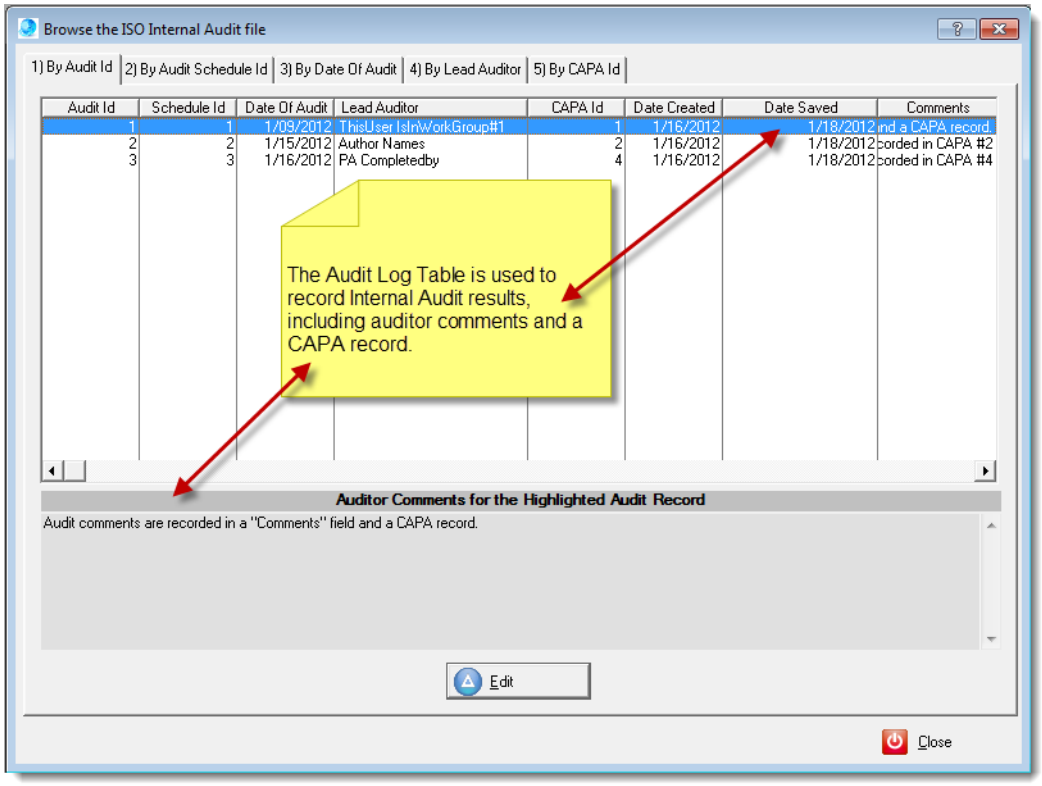
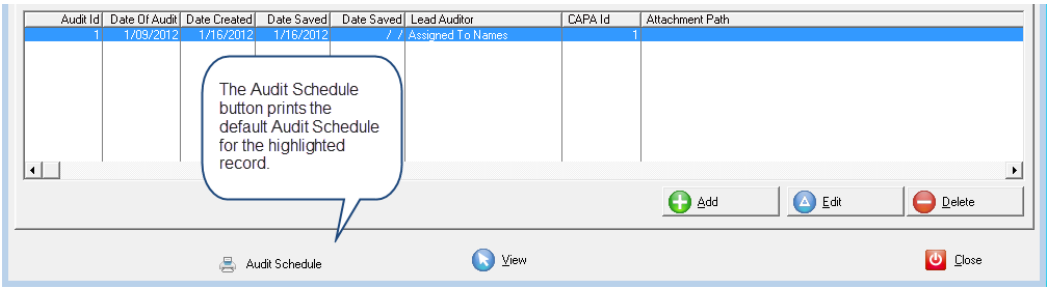
The **Audit Table displays** on-screen the **Audit Results Log**.



10.2.4 Printing an Audit Schedule



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10.2.5 Sample Audit Schedule

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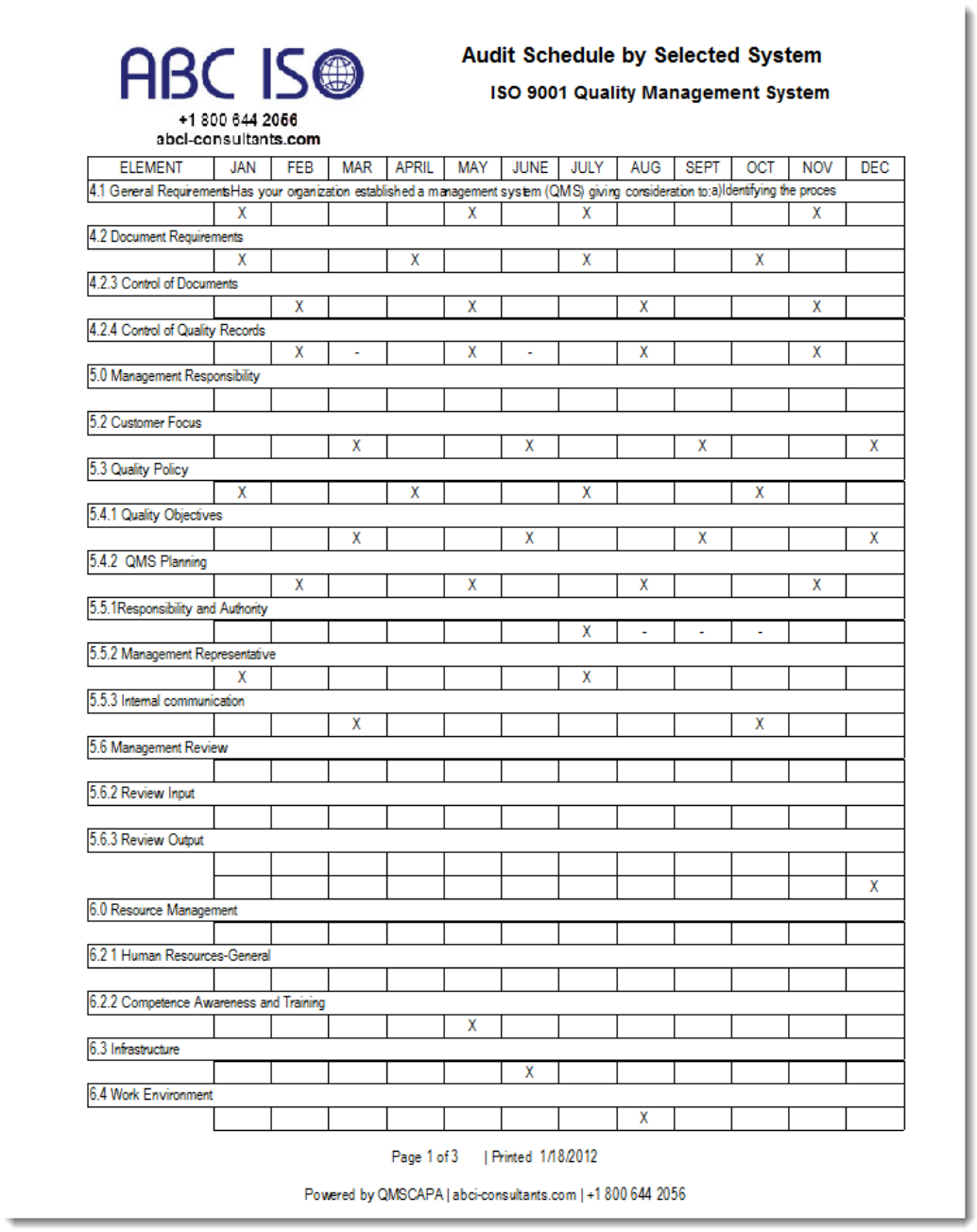

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Audit Schedule by Selected System

ISO 9001 Quality Management System

ELEMENT	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
4.1 General RequirementsHas your organization established a management system (QMS) giving consideration to:a)Identifying the proces												
	X				X		X				X	
4.2 Document Requirements												
	X			X			X			X		
4.2.3 Control of Documents												
		X			X			X			X	
4.2.4 Control of Quality Records												
		X	-		X	-		X			X	
5.0 Management Responsibility												
5.2 Customer Focus												
			X			X			X			X
5.3 Quality Policy												
	X			X			X			X		
5.4.1 Quality Objectives												
			X			X			X			X
5.4.2 QMS Planning												
		X			X			X			X	
5.5.1Responsibility and Authority												
							X	-	-	-		
5.5.2 Management Representative												
	X						X					
5.5.3 Internal communication												
			X							X		
5.6 Management Review												
5.6.2 Review Input												
5.6.3 Review Output												
												X
6.0 Resource Management												
6.2 1 Human Resources-General												
6.2.2 Competence Awareness and Training												
					X							
6.3 Infrastructure												
						X						
6.4 Work Environment												
								X				

Page 1 of 3 | Printed 1/18/2012

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11 Login and Security Settings

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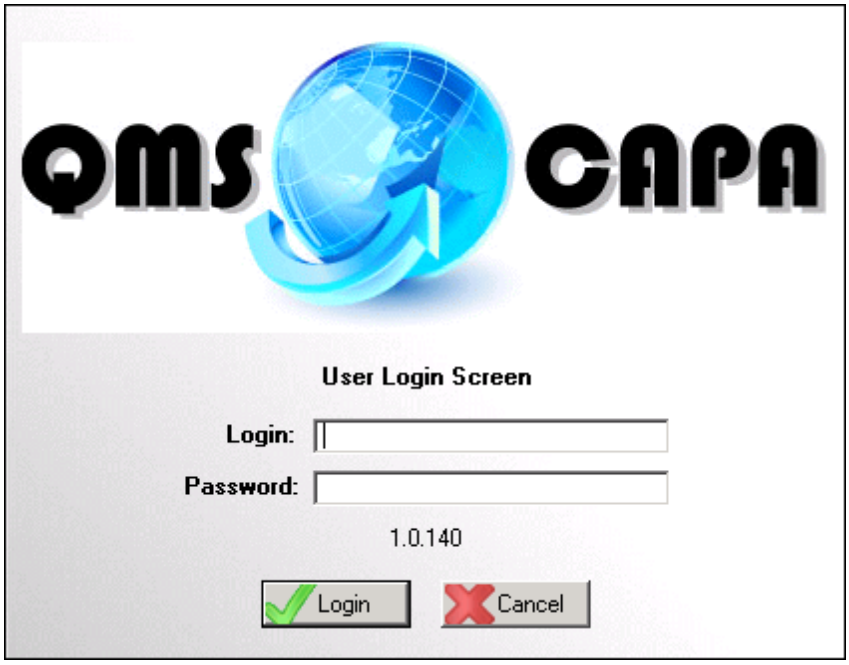

About Security

Security will always be a balancing act. The opposite of security is convenience, foolproof security is almost impossibly inconvenient, while simplifying it almost always leads to lower levels of security.

When a user is created in QMSCAPA they can be classified into one of 3 possible Levels. The level with all the power is called a Supervisor. The Level with no power (in fact they will be denied access) is called No Access. In between, where a user has potentially limited power, they are allocated a Level called Operator. The difference between a Supervisor, and an Operator is obviously a significant one. Simply put, a Supervisor is allowed to change the security access rights of other Users. An Operator can not change either their own, or anyone else's, Access rights.
QMSCAPA may be distributed without its Security option enabled. When the Security option is enabled and the program is run the User is asked to enter a Login and a Password. A User's information is made up of a First Name, Last Name and Login code. When you first add a user the Password is automatically set to be the same as the Login code. After you have finished entering the first user, then you can use the Login, and Password (which will be the same at this point) to log in.

Three things must be done to implement security in QMSCAPA.

1. First, set up your user groups. Take some time to organize groups of users by department or job function.
2. Second, add your users. Assign every user a Login and Password.

3. Third, define screen access levels.

Related topics:

Browse User Security
First User

11.1 User Security Options

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CAUTION: This feature should only be used by a System Manager.

Open the User Security Browse Table.

The User Security edit window allows specific security settings for Supervisors and Operators.

Open the Security Setting Access Control window to adjust specific access of Window Controls.

Select the [User Security] button control. The User Security window will open. At the bottom of this screen, press the button labeled User Group Details. You will see a list box, probably empty, so press the Insert button. You will see a form that asks for a User group name, and default access. Type in the name of the new user group and select "All Access" for the default access. Leave the Level set to Operator. The next User Group you enter will allow you to select a previously defined user group for a default access. User groups can inherit other user groups access privileges.

User Group Details
The Operator Browse screen is on the QMSCAPA Update User screen in the Company/Vendor section. Any Supervisor can add new Users using these built-in Operator Browse and Form Screens. On the Form are the following fields;

First name & Last name: These apply to the Operator.

Login: This is the Login Code the user will use to identify himself to the system. Note that the Supervisor cannot set the Password QMSCAPA for the user. The Password for QMSCAPA will default to be the same as the Login Code, after that only the user can change it.

Level: Set the User to be either another Supervisor, and Operator, or a

User with No Access to this Area.

Default Access: If the User is an Operator, then you can set their Default Access. this is typically either All Access, or No Access, but it can also be set to the Login code of another Operator. In that case the new Operator will assume all the current Screen Security settings of the selected Default Access Operator.

User Group: If the User is an Operator, then he can belong to a pre-defined User Group. For complete information on what User Groups are, read the section in this guide entitled Setting-up User Groups>Main.

12 Report Builder

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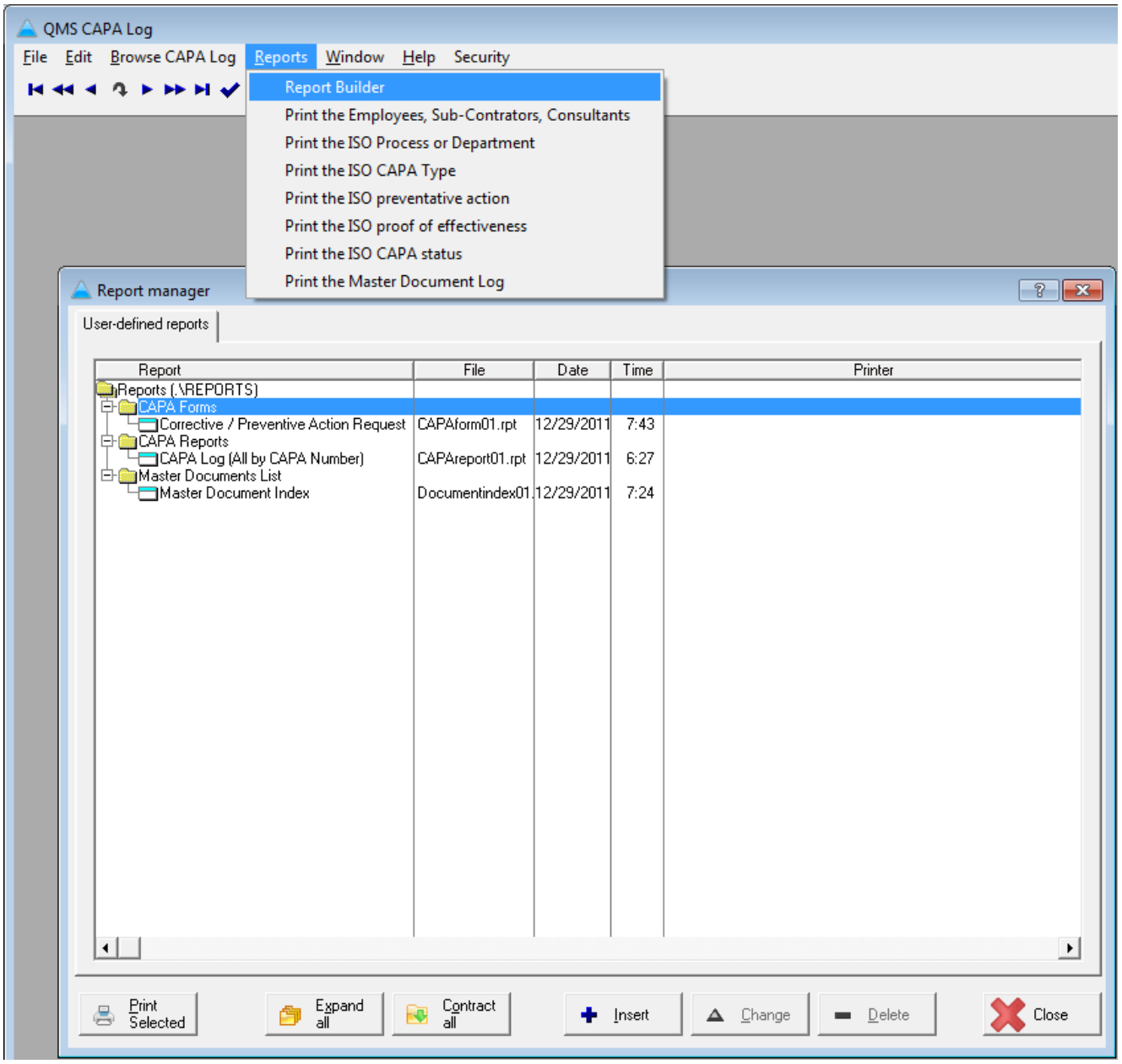
A **Report Builder** is an end-user report writer tool for extracting information from a QMSCAPA database in a highly structured manner. Reporting styles can vary from simple columnar output to extravagant form letters and sales invoices. Some reports extract and/or manipulate data from a single database, while other reports may require several databases and complex formulae to generate information in the desired manner. (Report Builder is available with the Professional and Enterprise Licenses).

QMSCAPA contains menu options made available to the user for pre-defined reports. While these reports can usually fulfill the majority of end-user needs, times arise when a custom report has to be created. If the means to create/modify reports has not been included in an application, the programmer has to be hired to create the report for the user (usually at a substantial cost). The QMSCAPA Report Builder puts the power of creating/modifying reports into the users hands.



As with any new tool there is a learning curve involved. However, a willingness to experiment can pay huge dividends to yourself and/or firm. You can create as many new reports as you want without paying a programmer to create them for you.

This **Report Builder** is an extremely powerful tool, comparable in features to software costing hundreds of dollars. Practically any type of report that you require can be created with this simple, yet highly effective tool.

Report Builder Overview

- What is a report builder?

- What are some features of this report builder
- Database fundamentals
- Database filters
- Expression and Formulas

Quick Tour

- The report manager screen - managing reports you create
- The report creation screen - Get acquainted!
- Bands- An overview on how they process database information
- Frames - How they print text and database information on reports
- Dictionaries - Stores database field information and other useful data

12.1 What is a report builder?

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A **Report Builder** is a tool for extracting information from a **database** in a highly structured manner. Reporting styles can vary from simple columnar output to extravagent form letters and sales invoices. Some reports extract and/or manipulate data from a single database, while other reports may require several databases and complex formulae to generate information in the desired manner.

Many computer applications have menu options made available to the user for pre-defined reports. While these reports can usually fulfill the majority of end-user needs, times arise when a custom report has to be created. If the means to create/modify reports has not been included in an application, the programmer has to be hired to create the report for the user (usually at a substantial cost). A report writer puts the power of creating/modifying reports into the users hands.

As with any new tool there is a learning curve involved. However, a willingness to experiment can pay huge dividends to yourself and/or firm. You can create as many new reports as you want without paying a programmer to create them for you.

This **Report Builder** is an extremely powerful tool, comparable in features to software costing hundreds of dollars. Practically any type of report that you require can be created with this simple, yet highly effective tool.

12.2 Features Of Report Builder

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Report Builder can do a lot more than simply print columns of data. While that would certainly meet the needs of a lot of users, there are times when specific detail is necessary to accomplish your task. Here is

a short list of features you can use:

Accessing/Saving Report(s)

- Tree-styled Report Manager screen will help you to arrange your reports by means of classifying and grouping them by type and using several folders to store report files.
- You can create and manage an unlimited number of reports.

- Quickly create reports that are similar to an existing report by opening a file, then saving the report to a new file name.
- You can use Windows styled long filenames when saving reports.

QMSCAPA Report File Names

The QMSCAPA Report Builder will attempt to save your new reports with a name similar to "RPT00001.RPT." The second report that you save will be named "RPT00002.RPT" and the third will be named "RPT00003.RPT" and so on for additional reports. Therefore, end-users are recommended to **save report file names** using the automatic schema with the built-in serialized report file name.

If you makes changes to one of the QMSCAPA standard reports which are installed with the application, then you should save the changes using "**SAVEAS**" and let QMSCAPA suggest the appropriate name with the serialized naming schema as described above. If you save your changes with the same name as used by QMSCAPA to store its standard reports, then your changes will be overwritten each time QMSCAPA is upgraded.

Optionally, you may create your own report file names. If you elect to save your reports with your own naming convention, for example "MyQMSCAPAReport01" then it is not necessary to add the "**.RPT suffix**" at the end of the file name. The Report Builder will append the suffix to your custom file name. Once again, end-users should not use the QMSCAPA report file naming convention to save new or modified reports.

Data Creation/Manipulation

- Simultaneous processing of several data tables joined in an integrated structure
- Effective and high speed filters for records using any available fields from applications database file(s), including expressions and functions of the Report Builder's native programming language

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- Sort data using any available fields, including expressions and functions of the Report Builder's native programming language
- You can easily build complex expressions with help of the built in Data Dictionary. The Dictionary contains all the field names, functions, operators, built-in variables and user defined total variables/calculated fields which are allowed for use in an expression. The Dictionary also shares a tree-style hierarchical structure.
- Supports end-user creation of total variables of type Sum, Counter, Average, Minimum, Maximum, Evaluate. Total variables can be reset on the end of appropriate sorting group as well as on the end of each page. These variables can be set up to be evaluated at the start of report, at the each record, at the end of a sorted group, at the end of page, at the end of report.
- Supports end-user creation of "Calculated fields". They are very similar to "Total variables" but always use the Evaluate type and never being reset. You can accomplish very complicated computations using any number of Total variables and Calculated fields.
- Print the current date and time on a page. The Picture can change the format of a date or time field to any desired format. For example, you can change 02/21/00 to read "21 February, 2000" at report runtime.

12.3 Report Builder - User Interface

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User Interface

- The **report formatter** or painter uses a word processing-styled interface, with buttons commonly found for formatting text (right align, left align, center align, etc)
- Supporting report sections (**bands**): Page header, Report header, Group break, Group header, Detail, Group footer, Report footer, and Page footer. Each band can contain an unlimited number of **Frames** to represent information.
- Frame contents may be a text string(s), or a formula. This is similar to Microsoft Excel usage: if the frame contents begins with the equal sign "=" then it means the rest is the formula to evaluate. In that way you can reference the only one variable as well as the expression containing as many variables and functions as you want.
- Use borders around the Frames to make them standout. For example, you can place a border around dollar totals at the bottom of reports. You can also use all the Frames with borders and join Frames side-by-side to get grid-style report. Frame borders may have varying thickness and color. Also the whole frame can be filled by selected color.
- You may select a font typeface, size, style and color for the whole

report or report section as well as for individual frame. Use different fonts and font types to make key data stand apart from other data.
- You can select multiple Frames at the same time for repositioning or alignment operations.
- Frame contents are placed and aligned both vertically and horizontally.
- Print the current page number as well as the total number of pages on each page header/footer.
- Print the number of database records printed on the current page (useful for page footer information).
- Ability to export report pages in WMF format to Microsoft Word for Print Preview, Edit, Save as *.doc format file, Printing purposes, etc.
- Add graphics to a report that are stored on your computer.
- Save one or more versions of a report for unique output and/or results.

QMSCAPA Report File Names

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12.4 Databases

As simple to use as this report builder is, there are some **database** fundamentals that you should be comfortable with in order to get the most out of this powerful tool. It is one thing to blindly type information

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into a computer, but empowering yourself as to how a database program really works will greatly enhance the reports that you create.

A database is nothing more than a collection of information that is somehow related. A common phone book is a wonderful example of a database. A basic definition of a phone book would be a collection of names, addresses, phone number(s) for people and businesses in one physical area (usually a city, or a common area code number). So, a database would be all the names, addresses and phone numbers contained in a phone book.

A database file is comprised of two new terms: database records and database fields. going back to the phone book once again, each persons name listed in the phone book would be a database record - it contains all the information for one person or business (their name, address, phone number(s), etc). The next name shown in the phone book would be a separate database record, and so on.

A database record is made up of database fields. Using the phone book again as an example, we would have separate database fields for the following information:

- Individuals/business name
- Street address
- Phone number

A database can have only one field, or can have hundreds of fields - whatever it takes to store all the information required for one database record entry.

A phone book is usually sorted on the name of the individual/business, beginning with the number 0, and ending with the letter Z. This type of sort is known as ASCENDING sequence. If you started at the back of a phone book and worked your way to the front (going from the letter Z to the number 0) this sort is called DESCENDING sequence. Sorting a database requires the creation of a second type of file known as a database index, which can also be called a database key.

A database index is a file used by a database application to change the appearance of information stored by the database. Going back to the phone book example - every day the phone company creates phone numbers as people and businesses move into the city. Their name(s) are obviously not going to be in alphabetical order when the clerk creates their new phone number - a person named Jones may be first, then Joe-Bob's Barbeque is next, then Alpha-Beta Drugs may be third, and so on. Without a way of sorting this information a printed phone

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directory would be a total mess - names would jump around the alphabet! The index file's job is to regain some structure and order to the information being input into the database.

A database index file can be created using one database field, or several database fields. These file(s) are normally opened when the database is opened, and as each database record is added/deleted an identical action is performed on the index file. For the phonebook example, the desired sort would be the individual/business name to be sorted in ascending alphabetical sequence. The fieldname used for the index would be the individual/business name. If your phone company were really customer-oriented they could perhaps create section(s) in their phone book that were sorted on the street address - a new index created on that database field would be created/used to print this new section of the phone book.

Index file(s) are most commonly used in browse screens (a screen where all the database records are displayed in columns, sorted alphabetically for easy location of information) and reports.

Index file(s) are also used to relate two or more database files together, which store different pieces of information that belong together. This type of database application is known as a relational database - two or more database file(s) relate to each other by means of a common database field, and an index file that links the two separate files together.

An example of a relational database could be your bank account. When you first joined your bank you filled out a form with your name, address, work history, etc. The clerk typed this information into the computer, handed you a bundle of blank checks and thanked you for joining their bank. All this "initial" information is stored in a database. As you start writing checks to pay for things a transaction is created for the date it was written, the dollar amount, the date the transaction was posted to your account, the check number, etc. These transactions are stored in a separate database file.

In the example above, we have one database that stores customer information (name, address, etc) and another database that stores transactions for each check cashed. In both database files is a field that contains the account number, and an index file is created for each database on this field. The two database files are related to each other by these index files created on the account number.

Not all database applications require a relational setup - if the information being tracked is simple then a single database file will contain all the data being monitored. However, all business type database systems rely on the relational database structure in order to

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keep track of a large quantity of information. Relational databases greatly reduce the amount of information being kept in database files, which keeps the size of the database file(s) small and increases the speed of the program in retrieving data.

This Report Builder can create reports from single database programs or relational database programs.

12.5 Fields

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A database record is made up of database fields. Using the phone book again as an example, we would have separate database fields for the following information:

- Individuals/business name
- Street address
- Phone number

A database can have only one field, or can have hundreds of fields - whatever it takes to store all the information required for one database record entry.

12.6 Database filters

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A **database filter** enables you to extract information from database file (s) that you want to print on the report. The ability to use filters in database programs has always been one of the strongest features of database applications (dBase, Foxpro, Access, etc). While they can be a little confusing at first, if you understand some basic concepts of how to create a database filter you will find them to extremely helpful in creating useful reports.

Filters do not change any information contained in database file(s); they don't copy information to another file either. A filter simply "hides" information that you don't want to see, which explains why they are called "Filters". No matter how many times you create or use a database filter, you are guaranteed that they will NEVER harm your database information. Hopefully this will give you the confidence to try creating filters for various purposes.

Reports may be filtered on the Report Property level and/or on a Report Band level. In the example below, the **Report Properties** are found inside the Report itself under the FILE > REPORT PROPERTIES menu

option.

The **REPORT PROPERTIES** contains the master **Page layout** information, plus a field to store the **Report Builder Menu information and a Record filter.**

Related Topic: Expressions and Formulas

12.7 Expressions and Formulas

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Expressions

An expression is made up of two types of components: operands and operators. Operators perform an operation (such as addition, subtraction, etc.) on one or more operands of the expression. Operands are the components on which operations are performed. Operands either contain or return a value. Constants, data dictionary columns, memory variables, and functions are examples of operands. An operand can be made up of more than one component, such as a function and its parameters.

The Frame Editor lets you choose operators and operands, and then insert them into the Statement line.
The sections below lists all the components used in Clarion expressions.

Math Operators

+ Plus sign: Adds two operands together.
- Minus sign: Subtracts one operand from another.
* Asterisk: Multiplies one operand by another.
/ Slash: Divides one operand by another.
% Percent sign: Returns the remainder from a division operation (modulus division).

^ Caret: Raises one operand to the power of the other.
( ) Parentheses: Groups components together within an expression.

Logical (Boolean) Operators

= Equal: Evaluates whether one expression is equal to the other.
< Less Than: Evaluates whether one expression is less than the other.
> Greater Than: Evaluates whether one expression is greater than the other.
<> Not Equal: Evaluates whether one expression is not equal to the other.

>= Greater or Equal: Evaluates whether one expression is greater than or equal to the other.

<= Less or Equal: Evaluates whether one expression is less than or equal to the other.

AND Connects two logical expressions together. For an expression containing an AND to be true, both expressions of the AND must be true.
OR Connects two logical expressions together. An expression containing an OR is true if either expression of the OR is true.
XOR Connects two logical expressions together. An XOR expression is true if either expression is true, but not both.

NOT Reverses the evaluation of an expression.
~ Reverses the evaluation of an expression.

String Operators
& Ampersand: Appends one text string to another.

Operands

Data ~Includes data dictionary columns, global, and local memory variables.

Functions ~All of the built-in functions of the Clarion language. These functions all perform some operation on parameters (other operands) and return a value.
User ~Any FUNCTION in your application. These functions perform some operation on parameters (other operands) and return a value.
Constant Text ~You can type constant text surrounded in single quotes ('A') on the Statement line.
Constant Number ~You can type constant numbers on the Statement line. Constant numbers can be represented in any valid format, such as Decimal (1 or 1.2345), Scientific Notation (22e4), Binary (0101b), or Hexadecimal (1AFFh).

Example Expressions

```
Lastname & ', ' & FirstName                !concatenated string constants & variables
ABS(Amount)        * 100                   !function, numeric variable & constant
TaxCode = True AND Amount > .25            !Boolean with variables & constants
```

12.8 Report Formatter Screen

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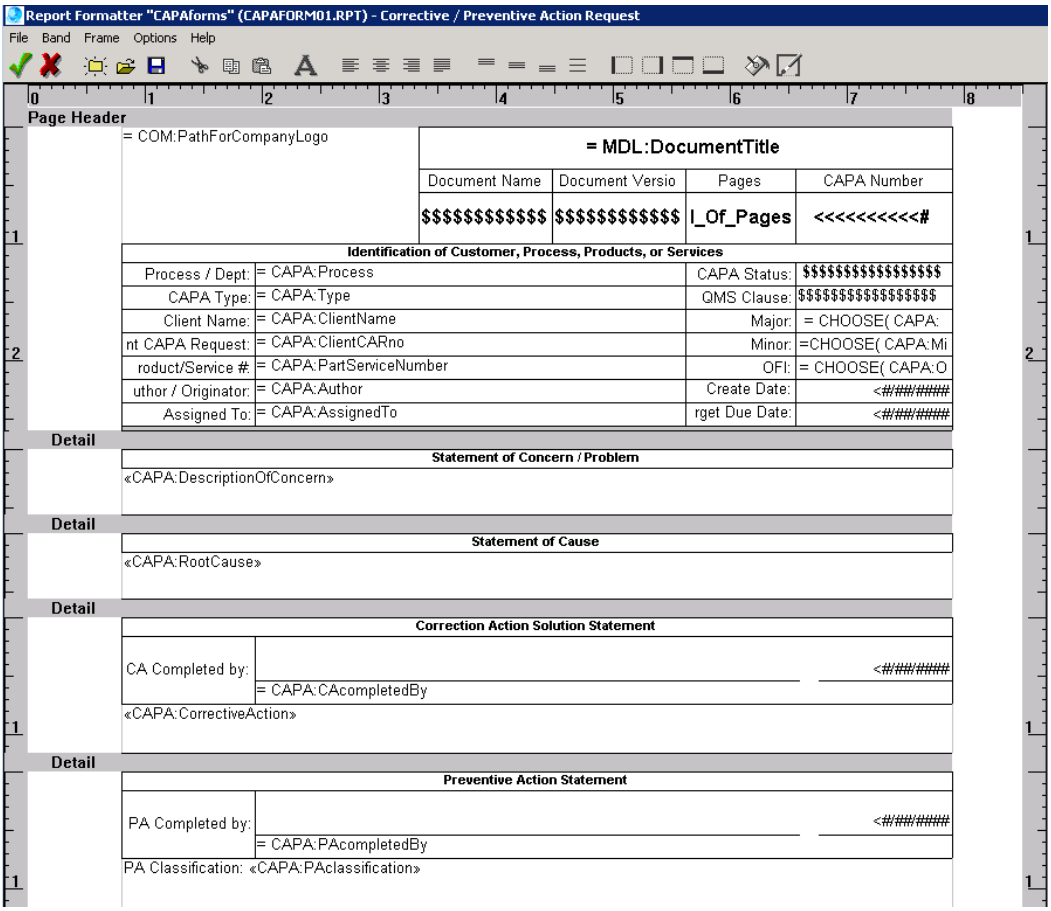
Whenever you create a new report or modify an existing report you will be using a report formatter or "painter" to place item(s) in the desired location. The screen is very easy to use, with a toolbar of commonly used commands, a pulldown menu, and use of the right mouse button to modify item(s) on the screen. Here is a sample screen "painter"; place the mouse button over an item - if the mouse cursor changes to a hand you can left click the mouse to see what the item does.



12.8.1 Adding Text Frame

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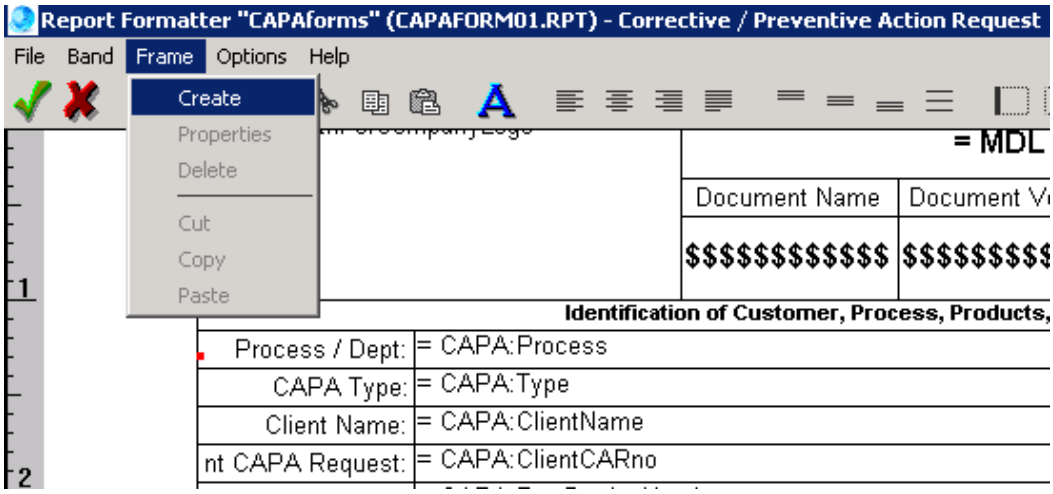
After text to a frame is very easy; it is the default action for a new frame. As soon as the frame is added to the report band you can immediately start typing:

The above screen capture shows a report band with a Page Header report band; created inside is one frame, and the text string "Sample Report Title" has been entered. As you type information into the entry field for 'Contents'

the screen is updated to reflect the information.

You can right click on the frame to change the characteristics of the information (in this case, the text string "Sample Report Title") will be printed.

Because the frame contains only a text string (Sample Report Title) you don't have to worry about the Picture tab, or the Picture pushbutton, since you are typing the text string as you want it printed.



12.8.2 Frames

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Frames are used to mark the boundaries of an object placed in a report band. A better explanation in "laymans terms" would probably be best described as a "box that will contain something". Frames are usable on certain report bands that you add to a report.

To define a new frame, you will:

- Left click inside the report band that you want something to be printed; this will select the report band to receive the empty frame
- Right click the mouse to display a popup menu; from this menu select 'New Frame'

A new empty frame is now displayed inside the report band where you had previously left clicked the mouse:

As shown above an empty frame was placed inside the Page Header Report Band; red blocks outline the frame, indicating that you can stretch any of the corners to meet your printing size requirement. You can also

drag the empty frame to a different location inside the report band by left clicking inside the empty frame, then drag the empty frame to the desired location. When dragging the empty frame the border will turn completely red - release the left mouse button after moving the frame to set it's position.

A useful ruler bar to aid in positioning frames for the report. You can toggle the ruler bar style between the English system and Metric system by selecting the main menu option OPTIONS, then METRIC SYSTEM. If a checkmark is displayed to the left of the menu entry the ruler bar is displayed using the metric system, and vice versa.

Once you have moved and/or resized the frame you need to define what you want printed in this location. A frame can contain many things:

- A database field used in the application
- A text string (such as a report header, column header, etc)
- A calculated field that is generated at runtime
- A page counter
- The current date or time
- Total fields (such as total expenditure, dollar total, etc)

Frames can also contain MULTIPLE items - this is handy when you want to format database information to look a certain way. Here are some examples of combining multiple items inside a frame:

- Two or more fields: CUS:Fname &' ' &CUS:Lname [The &' ' places a blank space between the first and second name]
- Two or more fields; remove empty space at end of each field: clip (CUS:Fname) & ' ' & clip(CUS:Lname)
- Two or more fields; highly formatted: clip(CUS:Lname) & ', ' & clip (CUS:Fname)
- Fields and text: '* ' & clip(ITE:Description) & ' *'

Notice that the function clip() was used with text information (remember to ALWAYS surround any text information with the ' symbol). Any of the report builder functions may be used to format database information (such as the Upper() and Lower() functions).

To change the contents of a frame and/or it's properties you will use the Report Formatter Frame Edit Box.

Related Topic: Expressions and Formulas

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12.8.2.1 Frame Properties

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In many ways, a **FRAME** is very much like a **CELL** inside a spreadsheet. However, a **FRAME** may be placed at any position inside a **BAND** and is not constrained by a ROW or COLUMN in a spreadsheet. This dialogue box allows you to modify the appearance of information stored inside a frame. You can display this popup window by double clicking on a frame, or right click on the frame and select from the popup menu the choice titled Properties:

You can change any aspect of the frame contents by using this dialogue box. Here is a breakdown of the various options:

- Contents: If you are going to use the frame to contain text you can simply type it into this entry field. If you want the frame to contain database information click on the Dictionary button to select a database field, or alternatively format the information using the built in functions. You can modify the contents at any time by selecting the frame and re-editing.
- **FRAME TYPES**: A frame type can be **CUSTOMARY**, **MAIL MERGE** OR **IMAGE FILE**.
- **CUSTOMARY FRAME**: Use the CUSTOMARY FRAME for most fixed length data fields and field report labels.
- **MAIL MERGE:** Use the MAIL MERGE FRAME to place multiple fields with various sizes into a particular BAND.
- Contents - **Image File** Name: Include the Path and the Image file name (frameproperties,jpg or logo.bmp)
- Picture: If using database information inside the frame you can use a "picture" to modify it's appearance. Optionally, for large text fields leave the picture token blank.
- Appearance Group:

1. [ ] **Multiline Text** (Use this option if you want to wrap text content inside the FRAME. The contents of the field will conform to the size of the FRAME.
2. [ ] **Auto Resize Bottom** (Use this option to flow text from fields with large contents that may vary is size. This feature works best when the FRAME is placed alone on the last line of the BAND. Therefore, the FRAME may be set to .20 but with this feature enabled the FRAME will automatically adjust to a height that is needed for the inflow of text.
3. **ROTATION ANGLE:** Use the **ROTATION ANGLE** on a CUSTOMARY Frame to show field variable data or text on a slant.

- Align Horizontal: A drop list of different positions that the frame contents are aligned horizontally inside the frame.
- Align Vertical: A drop list of different positions that the frame contents are aligned vertically inside the frame.
- Left Margin: Define in increments of 0.5mm the gap between the edge

of the frame and it's contents from the left edge of the frame.
- Right Margin: Define in increments of 0.5mm the gap between the edge of the frame and it's contents from the right edge of the frame.
- Top Margin: Define in increments of 0.5mm the gap between the edge of the frame and it's contents from the top edge of the frame.
- Bottom Margin: Define in increments of 0.5mm the gap between the edge of the frame and it's contents from the bottom edge of the frame.
- Between Margin:
- Border Color: Displays a standard Windows color selection box to choose a color for the border drawn around the frame.
- Left Border: A checkbox that allows for displaying (checkbox is check marked) or not displaying (checkbox is empty) a border on this side of the frame. The default setting for the report builder is to display a solid black border around the contents of the frame.
- Right Border: A checkbox that allows for displaying (checkbox is check marked) or not displaying (checkbox is empty) a border on this side of the frame. The default setting for the report builder is to display a solid black border around the contents of the frame.
- Top Border: A checkbox that allows for displaying (checkbox is check marked) or not displaying (checkbox is empty) a border on this side of the frame. The default setting for the report builder is to display a solid black border around the contents of the frame.
- Bottom Border: A checkbox that allows for displaying (checkbox is check marked) or not displaying (checkbox is empty) a border on this side of the frame. The default setting for the report builder is to display a solid black border around the contents of the frame.
- Border Width: This is a spin box with a range of 0-9 which changes the border line width.
- Font: Displays a standard Windows dialogue box to change the font characteristics of the frame contents.
- Fill Enable: A checkbox allowing you to fill in a frame with a solid color. When check marked the button to the left of the checkbox is made available to select a color from a standard Windows color selection dialogue window.
- Save: Save changes made to the selected frame.
- Cancel: Abandon all changes made to the selected frame.

12.8.3 Report Bands

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There are 8 types of report bands, plus **frames**, that can be defined in a report:

1. **Page Header** - Your report can contain only one page header. This report band is printed at the top of the output on each generated report

page.
2. **Report Header** - Your report can contain only one report header. This report band is printed at the top of the output on only the FIRST generated report page.
3. **Sorting Band** - Your can have multiple Sorting Band details on a report. A sorting band may contain it's own header, footer and/or additional breaks. A sorting band is the mechanism for SORTING a report.
4. **Group Header** - This band is printed at the top of each page when the group break value has changed.
5. **Detail** - You can have multiple DETAIL bands in a report. A detail band is responsible for retrieving database information required for the report and printing the data onto the report.
6. **Group Footer** - This band is printed at the bottom of each page when the group break value has changed.
7. **Report Footer** - This band is printed at the bottom of the last generated page in the report.
8. **Page Footer** - This band is printed at the bottom of each page in the generated report.

12.8.4 Sorting Bands

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This band is used to print a header above a group. Let's examine a real world situation for using a sort band header.

Let's use a mailing list as an example. Your organization has members all over the United States in each of the fifty states. When your mailing list prints you want the output to be nicely formatted with a title above each state to be make locating people in a specific state very quick and easy. An example output without a group header may resemble:

```
AL  Bob McKinley
AL  Chuck Connors
AL  David Spinley
AZ  Alan Sockworth
AZ  Frank Sputz
AZ  Henry Rollins
```

And an example output with a fancy sort band header:

```
_____________
State: AL

_____________
        AL  Bob McKinley
        AL  Chuck Connors
        AL  David Spinley
```

State: AZ

AZ Alan Sockworth
AZ Frank Sputz
AZ Henry Rollins

Obviously a group header can be as simple or fancy as required. Different font types and colors can be used to help separate groups of data as needed. Aside from bring far more visually appealing for the user, they also aid in locating data that is grouped together much more efficiently.

A group header can contain a mixture of text and database field information. Use the frame charactistics dialogue box to help you build the group header.

12.8.5 Group Band Properties

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Sample Output:

Notice that the Group Footer was printed only after the state code changed from FL!

USER TIP: To force the FL data to begin printing on a new page click on the **Explicit Page Overflow** checkbox [ ] **Before Band Printing, which forces a New Report Page.**

12.8.6 Concatenation Symbol

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Concatenation is a fancy word that means "join together"; it is most often used in the computer programming world, which is why you've probably never heard of it.

The ampersand symbol (&) is used to join together one string field or string variable to another. The length of the resulting string is the sum of the lengths of the two strings. Numeric data types may be concatenated with strings or other numeric variables or constants. In many cases, the CLIP() function should be used to remove any trailing spaces from a string being concatenated to another string.

Examples: clip(NAM:Lastname) & ', ' & clip(NAM:Firstname)

'$' & ITM:UnitCost

Related Topic: Expressions and Formulas

12.9 Dictionary

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The dictionary is the "heart" of the report builder - it contains information on all the database fields used by your program, as well as internal variables and functions that you can use to customize your output. The **dictionary** may be accessed through a **FRAME**. Here is a sample dictionary:

Shown above is a sample dictionary. The dictionary uses an expandable "tree" format to access the different types of information that can be placed inside a frame. The tree above is shown in collapsed form for a better overall view. To gain insight into what the different dictionary categories are, left click on one of the following items in the above screen capture:

- Processed Files
- Functions
- Built-In Variables
- Standard Operators
- Standard Functions
- Calculated Fields
- Gather Totals

A dictionary stores all the data used in this application in an easily accessed format. It also provides access to powerful tools for manipulating data required for fancier reports. You can even create new variables to contain data that is extracted at report generation time!

12.9.1 Dictionary - Built in Variables

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As shown above there are 4 available built-in variables that can be used in a report. Double left click an entry to select the choice to insert the value into the Contents window of the FRAME properties entry field.

12.9.2 Dictionary - Calculated Fields

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The screen capture above shows a new calculated field being added to

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the dictionary. A new variable named "TotalCost" is being created that will contain the sum of two database fields (INV:Quantity + INV:Cost). The evaluation process is performed at the end of the page.

The new variable was created by clicking the blue '+' button after highlighting Calculated Fields.

Calculated fields can be looked upon as temporary storage in the computers memory to perform calculations on one or more database fields. This is primarily used for (but not restricted to) calculating invoice totals, inventory balances, etc. By changing the Picture you can have the output modified to better suit your needs. For example, if you are calculating a dollar total you could use the picture @N$-10.2 to display a dollar sign in front of the calculated field.

You can also change where the evaluation process occurs. There are 4 different methods to how fields are calculated:

- On the start of the report
- On each record
- On the end of the report
- On the end of the page

Related Topics: Expression and Formulas

12.9.3 Dictionary - Funtions

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These functions are different than those found in the Standard Functions. These functions are designed by the programmer especially for this pc application. The screen above may be totally blank, with no functions developed at all. Or, it could contain a dozen or more specialized functions that perform a specialized task.

The above screen shows four functions available to this application. You could select one of these functions for your report from this dictionary location.

Some examples of different functions that a programmer could create and store here would be:

- Convert a text string to a propercase statement
- Calculate true cost of an item, to include it's sales tax
- Calculate tariff costs for outbound sales
- Convert a standard date (mm/dd/yy) to a julian formatted date

(yyyyddd)

12.9.4 Dictionary - Gather Totals

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The screen capture above shows a new variable (Totalcost) being created that will contain the sum of two database fields (PRO:QuantityInStock and PRO:Cost). The total is evaluated at the end of the report. This option is used primarily to obtain and print grand total (s) from information contained in the database.

The new variable was created by clicking the blue '+' button after highlighting Grand Totals.

If you need totals printed on each page the option 'Page Totals' will better suit your purpose, as it will gather the information when each page is generated and properly insert the value on the output.

12.9.5 Dictionary - Processed Files

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This section of the Dictionary will be the most heavily used section by you - it contains references to all the databases and their fields. Depending on your application you may have only one database listed under "Processed Files" or many entries. The screen capture below shows three database files (Inventory History, Vendors and Products):

The above screen capture shows the Processed Files section of the dictionary. In this example there are three databases in this application:

- Inventory History
- Vendors
- Products

For each database you can expand the "tree" to view the database fields that it is made up of. The above example shows the Inventory History tree expanded to show it's database fields. The description for the field is shown under the database name - it is a more "english" looking name for the database field name, which is shown in the second column titled 'Name'. Notice that the database fields shown in the Name column have a prefix (INV:); this prefix is used to identify the database field at it's lowest level. Prefixes allow a programmer to use the same database field name in other database(s) used by this application.

The Processed Files section of the dictionary is used to select database

field(s) for use in frames, calculated fields, etc. To select a field simply double click the desired field to insert it into the frame or calculated field.

12.9.6 Dictionary - Standard Functions

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The language used to create this Report Builder has some extremely useful "functions" that programmers use to generate applications. Some of these functions are made available to you to use with your reports.

A function could be described as a means of converting something to something else. Data is manipulated using a function to generate a desired result. Kind of like a car going through a carwash - it looks one way going in, and another way coming out.

Functions are broken into four "groups":

Here is a more detailed breakdown of the categorized function types:

String Functions

- ALL() - Returns a text string that replicates itself a defined number of times. For example, ALL('A',5) would return the text string 'AAAAA'.
- CAPITALIZE() - Returns a text string with the first letter in uppercase and the remainder in lowercase.
- CHR() - Returns the ANSI character from an ASCII code. For example, CHR(122) would return 'z'
- CLIP() - Returns a string with the trailing spaces removed. Commonly used to properly format names and addresses into a more aesthetic appearing text string; multiple database fields are combined together using the concatenation symbol (&) to form a formatted string. For example, the database field ADR:City that contains the city name 'Tucson' could be combined with the ADR:State field that contains 'Az'. Because the ADR:City database field has 30 spaces allocated to it, and only 6 positions were used for 'Tucson', you would normally have 24 blank spaces:
  Tucson Az
  not exactly appealing! Using the CLIP() function and the concatenation symbol you
  can convert this to: Tucson, Az
  EX: CLIP(ADR:City) & ', ' & CLIP(ADR:State)
  Note that there is a blank space after the comma to "push" the state over one
  position to avoid crowding the comma character.
- DEFORMAT() - Returns a string that contains the unformatted characters of a numeric string. For example DEFORMAT('999-53-

9954') returns 999539954

- FORMAT() - Returns a formatted string; knowledge of the PICTURE command is mandatory to make best use of this function. For example SSN = FORMAT(Emp:SSN,@P###-##-####P), which would properly format the database field EMP:SSN to a standard social security number.
- INLIST() - Returns the position of an item in a comma delimited list. For example, INLIST('D','A','B','C','D','E') returns a value of 4
- LEN() - Returns the length of a string. For example, LEN('Scott Daughtry') would return a value of 14.
- LOWER() - Returns the lowercase version of a string. For example LOWER('SCOTT Daughtry') would be returned as 'scott daughtry'.
- NUMERIC() - Returns a true or false. If a string contains only numbers a true is returned. For example NUMERIC('123') would be true, and NUMERIC('1,23') would be false.

SUB() - Returns a portion of a string. You define where the starting and stopping positions are in the string. For example, SUB('Scott Daughtry', 1, 5) would extract positions 1-5 of the string, returning 'Scott'. SUB ('Scott Daughtry', 7, 3) extracts 'Dau' - the starting position is 7, and the next 3 positions are extracted from that starting point. You can also work backwards on a string by assigning a negative starting position. For example, SUB('Scott Daughtry', -1, 3) would return 'try'.

- UPPER() - Returns an uppercase version of a text string. For example, UPPER('scoTT') is returned as 'SCOTT'.
- VAL() - Returns the ASCII character numeric equivalent for an ANSI entry. For example, VAL('A') would return 65.

Mathematical Functions

- ABS() - Returns an absolute value from an expression. The absolute value of a number is always a zero. For example, C = ABS(A-B). C would contain the absolute value of the difference of B subtracted from A
- INRANGE() - Compares a numeric expression for an inclusive range of numbers. Returns a value of true if the scope is met, and false otherwise. For example, INRANGE(variablename, 1, 5) would check if the variablename is with the numbers 1-5, and return true if so. The starting number is 1, and ending number is 5.
- INT() - Returns an integer value from a numeric expression. For example, INT(8.5) would return a value of 8.
- LOGE() - Returns the natural algorithym. The natural logarithm of a value is the power to which e must be raised to equal that value. The value of e used internally for these calculations is 2.71828182846. For example LOGE(2.71828182846) returns 1; LOGE(1) returns 0
- LOG10() -Returns base 10 logarithm. If the value of the expression is

zero or less, the return value will be zero. The base 10 logarithm is undefined for values less than or equal to zero. The LOG10 procedure returns the base 10 logarithm of a numeric expression. The base 10 logarithm of a value is the power to which 10 must be raised to equal that value. For example, LOG10(10) returns 1; LOG10(1) returns 0

- RANDOM() - Returns random integer.Returns a random integer between the low and high values, inclusively. The low and high parameters may be any numeric expression, but only their integer portion is used for the inclusive range. For example, RANDOM(22, 80) would return a random number between the numbers 22 and 80.
- ROUND() - Returns a rounded number. For example, ROUND(5163, 100) would return the rounded number of 5163+100 (which is 5200); ROUND(657.50,1) returns 658; ROUND(51.63594,.01) returns 51.64
- SQRT() - Returns the square root of a number.

Trigonometric Functions

- SIN() - Returns the trigonometric sine of an angle measured in radians. The sine is the ratio of the length of the angle's opposite side divided by the length of the hypotenuse. For example, eturns the trigonometric cosine of an angle measured in radians. The cosine is the ratio of the length of the angle's adjacent side divided by the length of the hypotenuse. For example, sineAngle = SIN(45 * 3.142498712
- COS() - Returns the trigonometric cosine of an angle measured in radians. The cosine is the ratio of the length of the angle's adjacent side divided by the length of the hypotenuse. For example, cosineAngle = COS(45 * 3.142498712)
- TAN() - Returns the trigonometric tangent of an angle measured in radians. The tangent is the ratio of the angle's opposite side divided by its adjacent side. For example, TanAngle = TAN(45 * 3.142498712)

ACOS() - Returns the inverse cosine. The inverse of a cosine is the angle that produces the cosine. The return value is the angle in radians. p is a constant which represents the ratio of the circumference and radius of a circle. There are 2p radians (or 360 degrees) in a circle. For example, acos = ACOS(45 * 3.142498712)

ASIN() - Returns the inverse sine. The inverse of a sine is the angle that produces the sine. The return value is the angle in radians. p is a constant which represents the ratio of the circumference and radius of a circle. There are 2p radians (or 360 degrees) in a circle. For example, asine = ASIN(45 * 3.142498712)

ATAN() - Returns the inverse tangent. The inverse of a tangent is the angle that produces the tangent. The return value is the angle in radians. p is a constant which represents the ratio of the circumference and radius of a circle. There are 2p radians (or 360 degrees) in a circle. For example, TanAngle = ATAN(45 * 3.142498712)

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Date/Time Functions

- TODAY() - Returns the operating system date as a standard date. The range of possible dates is from January 1, 1801 (standard date 4) to December 31, 2099 (standard date 109,211). You can use a picture command to change the appearance of the return value. For example, cToday = format(TODAY(), @d01B)
- CLOCK() - Returns the current time based upon your pc bios time.
- DATE() - Returns a standard date for a given month, day, and year. The month and day parameters do allow positive out-of-range values (zero or negative values are invalid). A month value of 13 is interpreted as January of the next year. A day value of 32 in January is interpreted as the first of February. Consequently, DATE(12,32,97), DATE (13,1,97), and DATE(1,1,98) all produce the same result. The century for a two-digit year parameter is resolved using the default "Intellidate" logic, which assumes the date falls in the range of the next 20 or previous 80 years from the current operating system date. For example, assuming the current year is 1998, if the year parameter is "15," the date returned is in the year 2015, and if the year parameter is "60," the date returned is in 1960. For example, HireDate = DATE (Hir:Month,Hir:Day,Hir:Year); FirstOfMonth = DATE(MONTH(TODAY ()),1,YEAR(TODAY())) would compute the first day of month
- DAY() - Returns day of month. Computes the day of the month (1 to 31) for a given standard date. For example, OutDay = DAY(TODAY()) to get the day from today's date; DueDay = DAY(TODAY()+2) to calculate the return day
- MONTH() - Returns the month of the year (1 to 12) for a given standard date. For example, PayMonth = MONTH(DueDate) to get the month from the date
- YEAR() - Returns a four digit number for the year of a standard date (1801 to 9999). For example, YEAR(today())
- AGE() - Returns a string containing the time elapsed between two dates. The age return string is in the following format: 1 to 60 days - 'nn DAYS'; 61 days to 24 months - 'nn MOS'; 2 years to 999 years - 'nnn YRS'. For example, nAge = AGE(EMP:Birthday, TODAY()) would compare the database field EMP:Birthday against the computer date to return the persons age.

12.9.7 Dictionary - Standard Operators

The language used to create this Report Builder allows you to use 'operators' to create and/or compare values stored in your database file (s). Operators are broken into two different groups:

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Arithmetic

Addition - Add two variables together to produce a value. The addition sign (+) is used.

Subtraction - Subtraction one variable from another to produce a value. The minus sign (-) is used.

Multiplication - Multiply one variable against another to produce a value. The asterisk symbol (*) is used.

Division - Divide one variable into another to produce a value. The slash character is used (/).

Exponentiation - Raises one variable to the value of a second variable. The carat symbol (^) is used.

Modulus Division - Returns the remainder of one variable divided by another variable. The percentage character (%) is used.

Logical

Choose() - This function is used to perform a logical evaluation and return a value based upon the result. When a condition is evaluated to true the first return value is returned. If a condition is evaluated to false the second return value is returned. For example, CHOOSE(1 > 2, 'A', 'B') would return 'B'; CHOOSE(INV:Sex = 'M', 'Male', 'Female') would return the text string 'Male' if the database field INV:Sex contained a value of 'M'.

And - A boolean operator; used to combine 2 or more logical statements together. Used when you need/want multiple logical expressions to equal TRUE in order for something to occur. For example: INV:Sex = 'M' AND INV:State - 'Az' would require the database field INV:Sex to equal 'M' AND the INV:State database field to equal 'Az' for a value of true to be returned. If either database field did not contain these values then a return value of false is returned. The expressions are evaluated from left to right; if a value of false is returned then the subsequent expressions are skipped over, since a value of false has already been reached. If the INV:Sex database field did not contain a value of 'M' then the INV:State field wouldn't be processed at all - a value of false has already been returned. If the INV:Sex database field contained an 'M', but the INV:State database field contained something other than 'Az', then a value of false is returned, since both items must return a value of true. You can a very long expression with the AND operator. For example: INV:Sex = 'M' AND INV:State = 'Az' AND INV:Birthdate > '01/01/60'.

Or - A boolean operator; used to combine 2 or more logical statements together. Used when a condition can evaluate to a value of false but processing is still desired. For example: INV:Sex = 'M' AND Inv:State = 'Az' OR INV:State = 'Ak' would evaluate INV:Sex; if it equals a 'M' the INV:State field is evaluated. If it contained 'Az' an overall return value of true is reached. If it didn't contain 'Az' it is then checked for a value of 'Ak'. If it did, a an overall value of true is reached.

Not - A boolean operator. Used in conjunction with the Greater Than,

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Equal To or Less Than operators. For example, INV:State NOT = 'Az'; INV:Age NOT < 45; INV:Income NOT > 30000.

Xor - A boolean operator. Used when an expression can evaluate to true on one side of the equation, but not both. For example: A XOR B; true is returned if A is true OR B is true, but not both.

Greater Than - The symbol (>) is used for this operator. When you want the left side of an equation to return a value of true. For example, INV:Quantity > 5 would return a true if the INV:Quantity database field was greater than 5.

Lesser Than - The symbol (<) is used for this operator. When you want the right side of an equation to return a value of true. For example, INV:Age < 15 would return true if the database field INV:Age is less than 15.

Equal To - The symbol (=) is used for this operator. When you want an exact match in an equation for a value of true to be returned. For example, INV:State = 'Az' would return a value of true if the database field INV:State contained 'Az'

Not Equal To - The symbol (<>) is used for this operator. When you want a value of true returned when a variable does NOT contain a particular value. For example, INV:State <> 'Az' would return a value of true when it did not contain 'Az'

Greater Than Or Equal To - The symbol (>=) is used for this operator. When you want a value to be equal to or greater than something. For example: INV:Sold >= 325 would return a value of true if the INV:Sold database field was equal to or greater than 325.

Less Than Or Equal To - The symbol (<=) is used for this operator. When you want a value to be equal to or less than something. For example, INV:Sold <= 325 would return a value of true if the INV:Sold database field was equal to or less than 325.

Standard operators can be used to build complicated expressions when you want to "drill down" to highly specific data (which is normally the case). Make sure that the most important criteria is placed first that would (in theory) eliminate the majority of data when the database is scanned. This will speed up the remainder of the operational string when they are executed. Some expression examples:

EMP:Sex = 'M' AND LOC:State = 'Az' OR Loc:State = 'Nv' AND EMP:Haircolor = 'Brown'

STO:Location = 'Iowa' AND PAR:Vendor = 'Hasbro' AND PAR:Onhand <= 100

SAL:Total = INV:Itemprice * SAL:Quantity * SAL:Salestax

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13 Training

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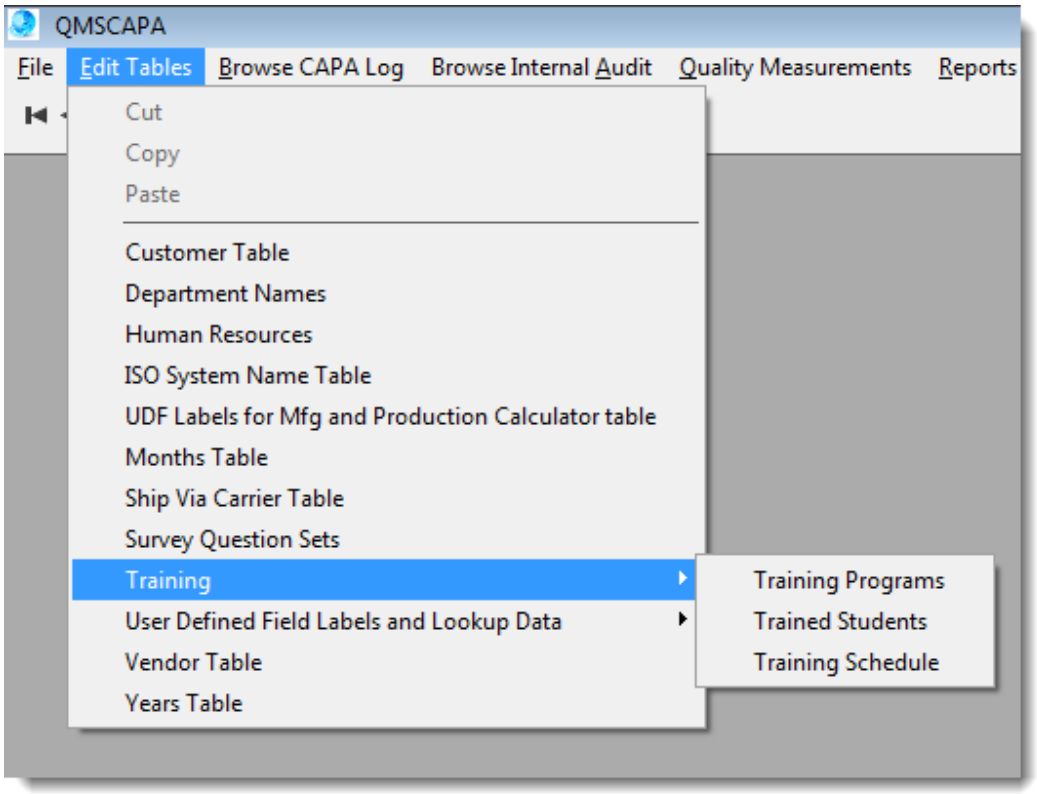
QMSCAPA provides a method of ...

- Creating a personnel training plan;
- Documenting mgtremgtraining programs;
- Recording Student training;
- Recording training effectiveness.



- The **Training Programs** menu option opens a table of training courses and training elements (components of the course).
- The **Trained Students** menu option opens a table of personnel that have been trained on specific Training Programs.
- The **Training Schedule** menu option opens a table of the Training Programs, which have been scheduled for specified students.

13.1 Training Programs

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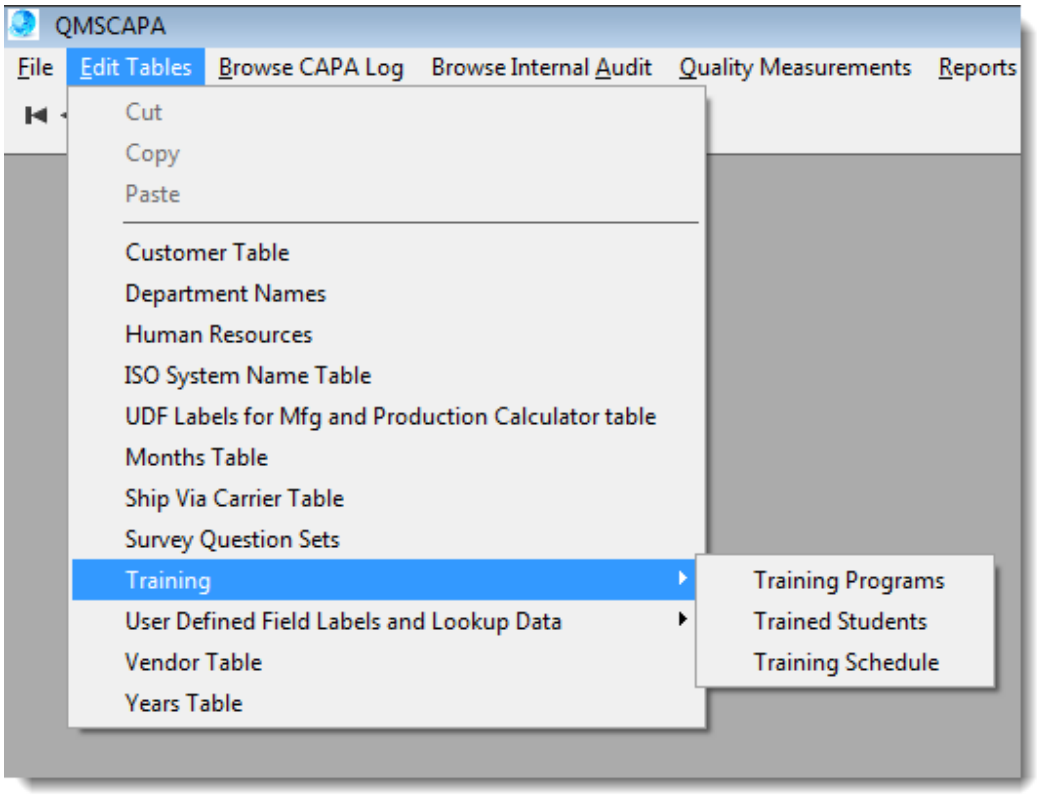
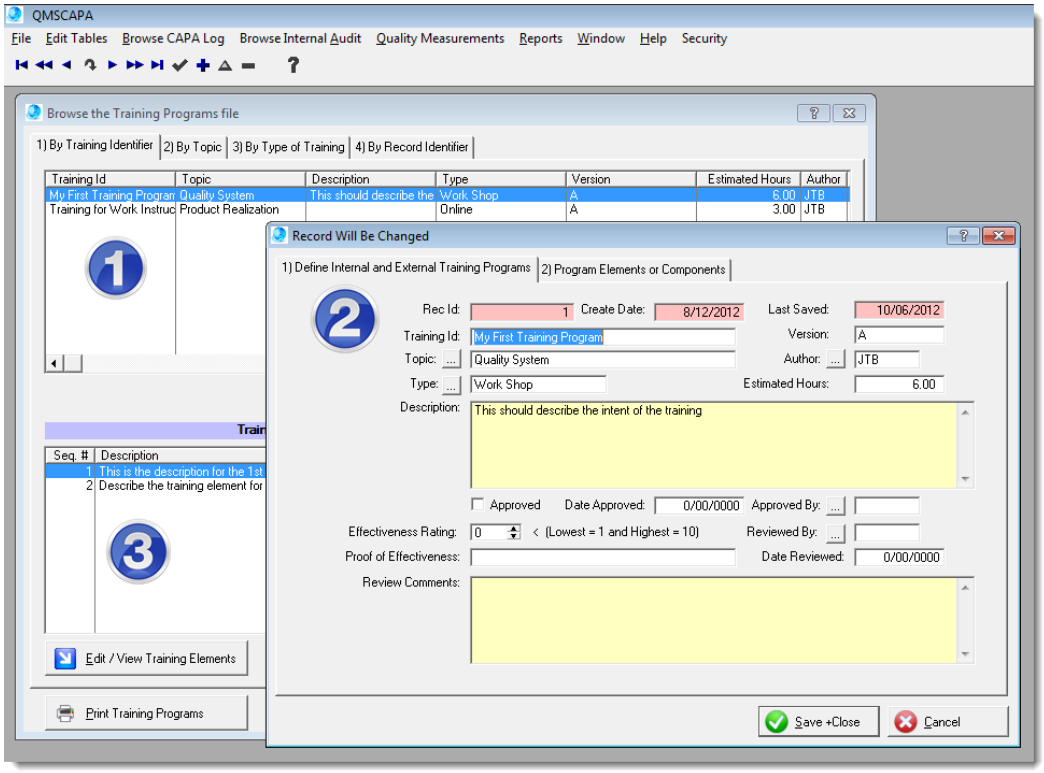


To *create or edit a Training Program* select ..

Edit Tables > Training > Training Programs

1) Section (1) shows a browse table of Training Programs. Training Programs is intended as a generic term for training course, training workshop and, or training class.
2) Section (2) shows a window form for adding or editing a Training Program.
3) Section (3) shows a browse table of the Training Elements that are part of or components of the Training Program. For example, a training course may be extended over multiple weeks and each weekly class may be defined within the training element.



13.1.1 Training Program Elements

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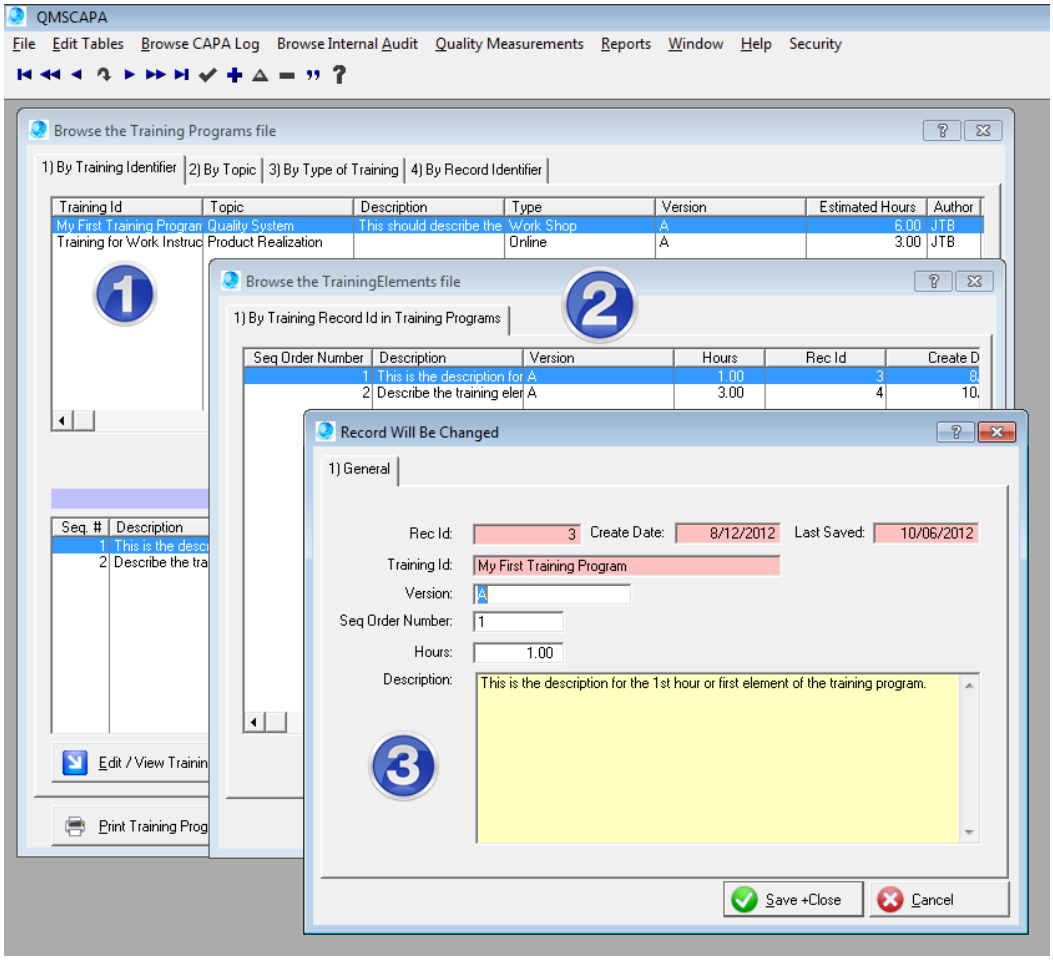
Training Elements are sub-components of a Training Program. Training Elements may be used to represent:
a) Workshops
b) Chapters
c) Days
d) Assignments
e) You name it!

1) Section (1) shows a browse table of Training Programs.
2) Section (2) shows a browse table of Elements of a highlighted record in the Training Programs browse table.
3) Section (3) shows the window form for adding or editing a training element.



13.2 Trained Students

To *create a Training Record* select ..

Edit Tables > Training > Trained Students

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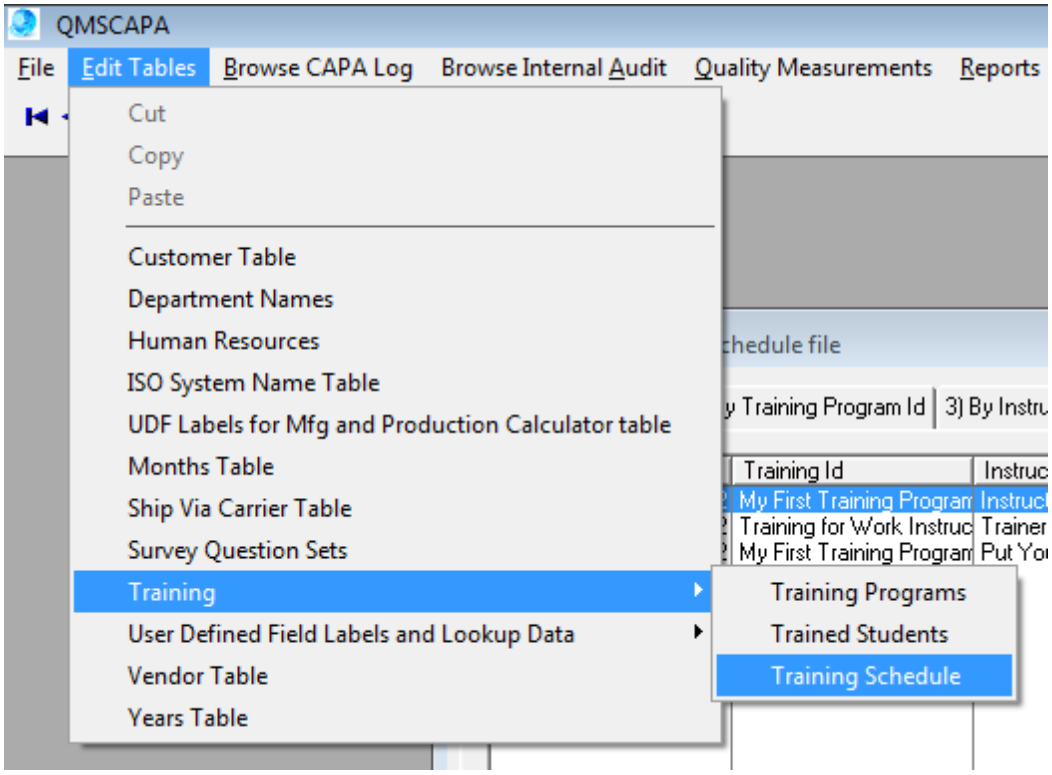
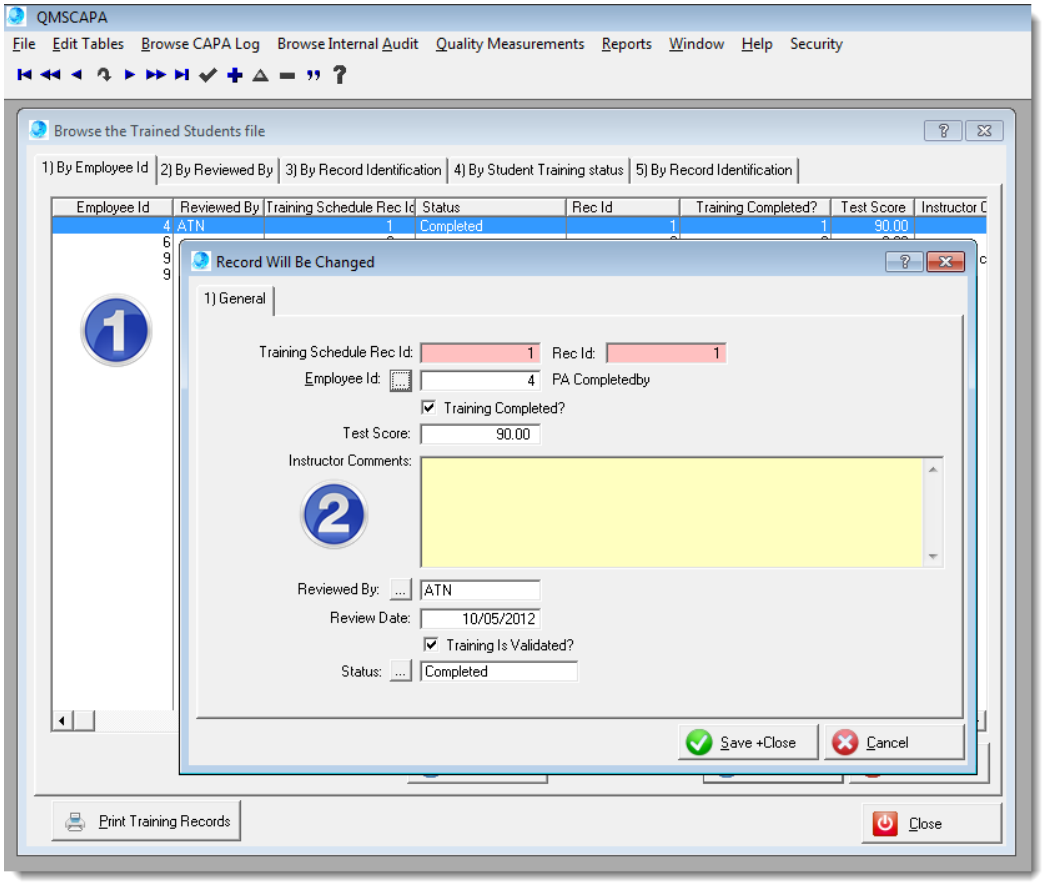


The Trained Students browse table is designed for enrolled students and students who complete a Training Program.

1) Section (1) shows a browse table of enrolled students.
2) Section (2) shows a window form for adding and editing *training records*.



13.3 Training Schedule

To *schedule a Training Program* select ..

Edit Tables > Training > Training Schedule

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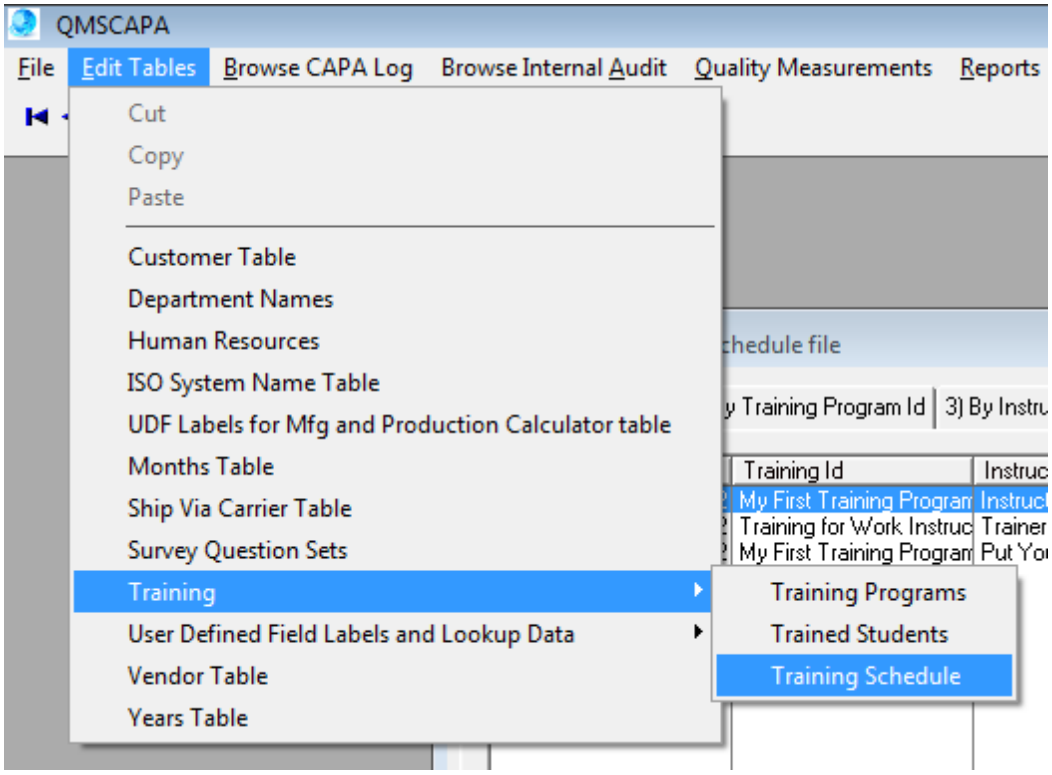
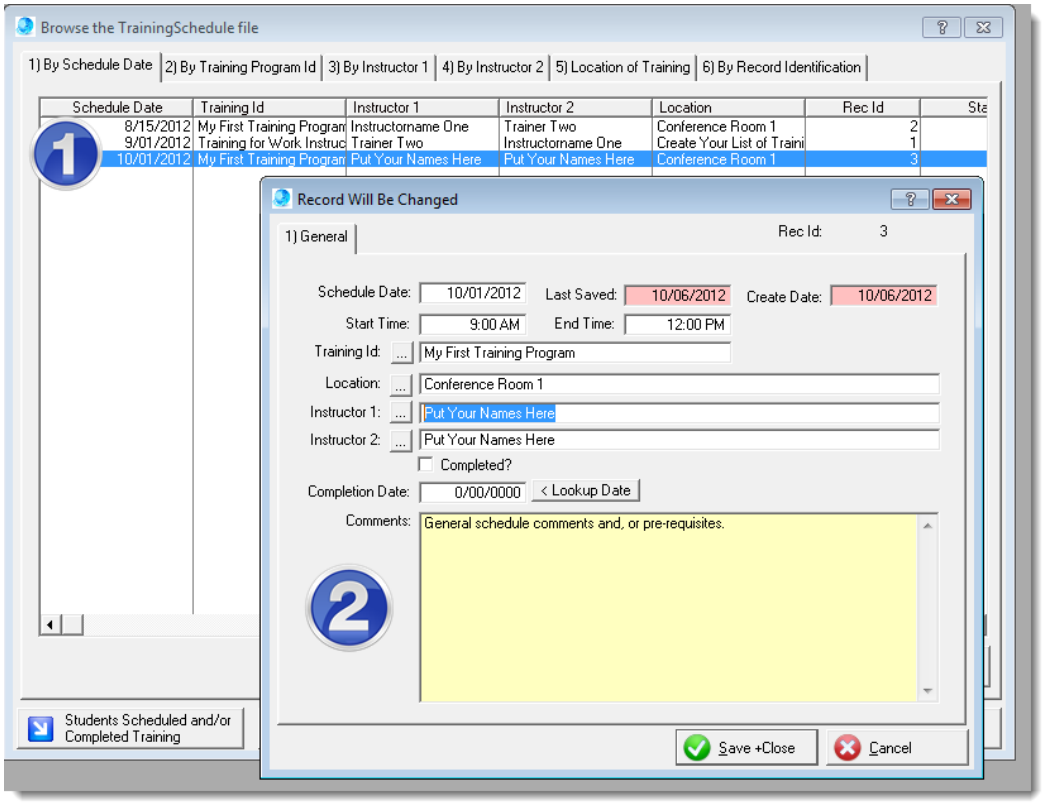


1) Section 1 shows the browse table for Training Programs, which have been scheduled.
2) Section 2 shows the window form for recording or scheduling a Training Program.



13.3.1 Adding Students to a Schedule

To *enroll students* and *schedule a Training Program* select ..

Edit Tables > Training > Training Schedule

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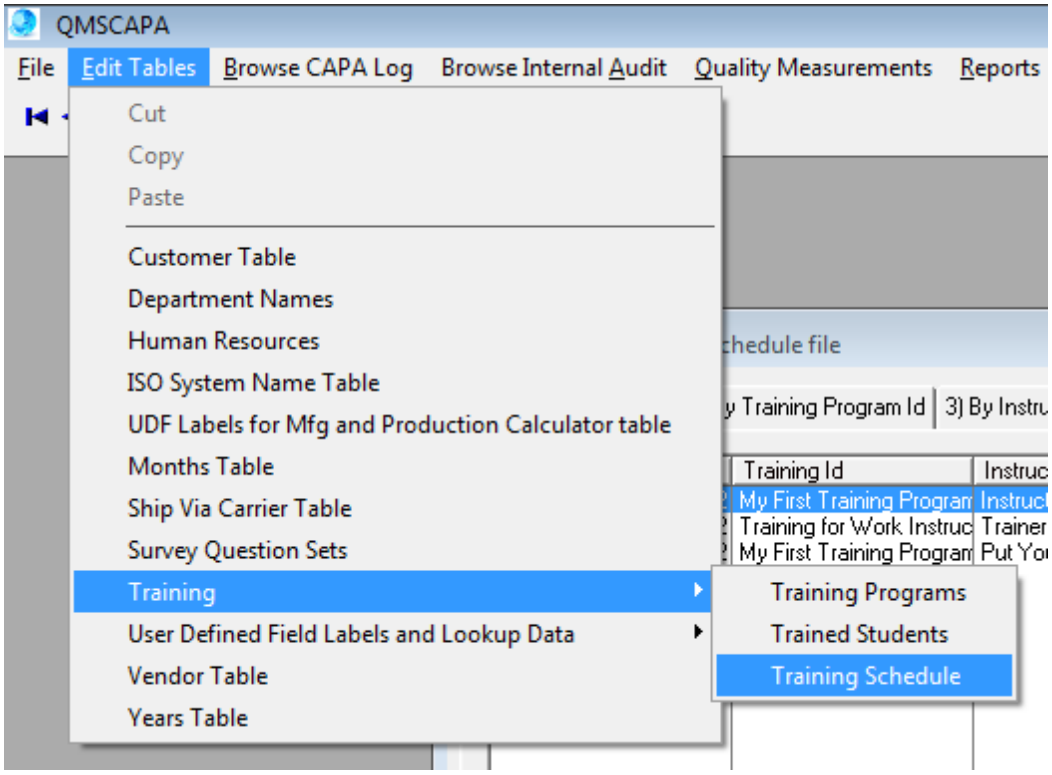
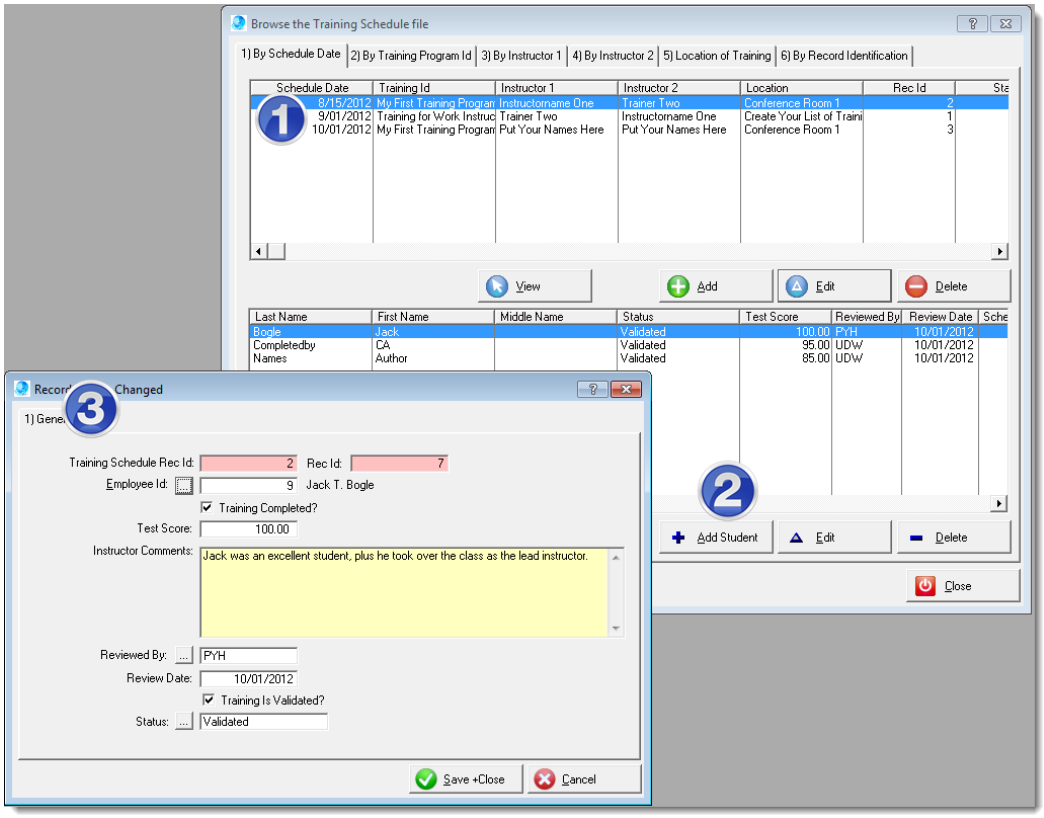


1) Section 1 shows the browse table for Training Programs, which have been scheduled by the date scheduled and Training Id.

2) Section 2 shows the browse table for Students that have been enrolled into the Program that is highlighted in table (1). Use the [Add Student] button to record a student enrollment.

3) Section 3 shows the window form for the enrolled student and the status of their training outcome.



14 Utilities

14.1 File Manager (Internal)

The internal FILE Manager, which is embedded within QMSCAPA™, is designed to keep QMSCAPA™ database files working in top form.

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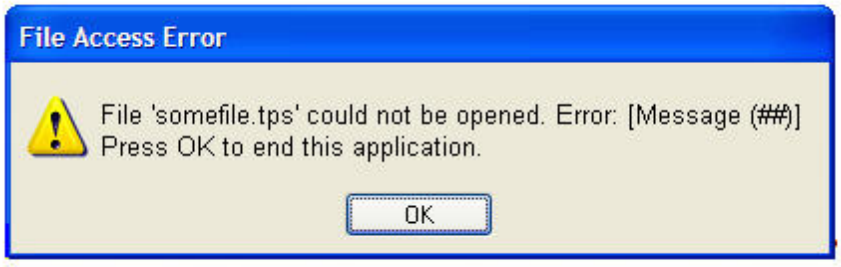
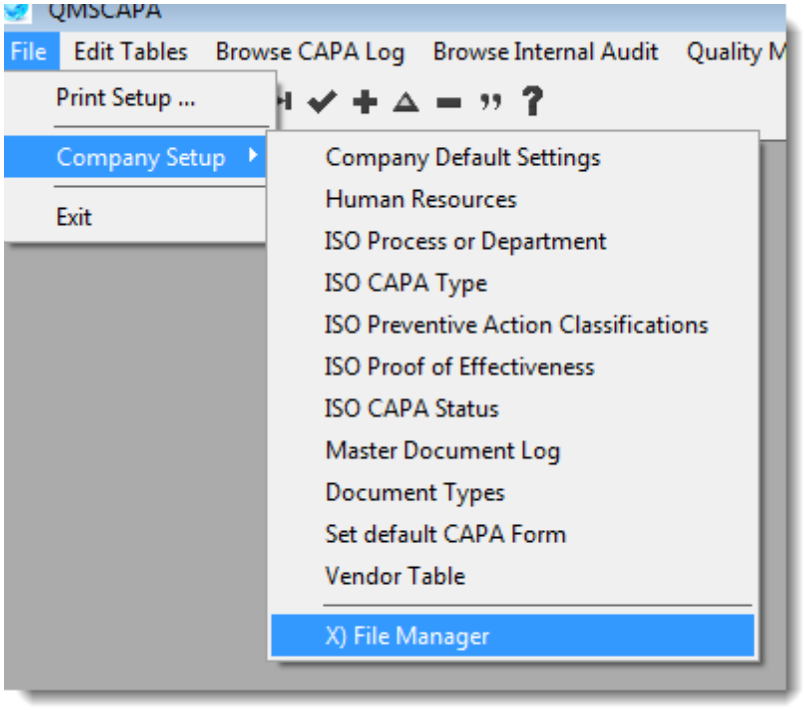
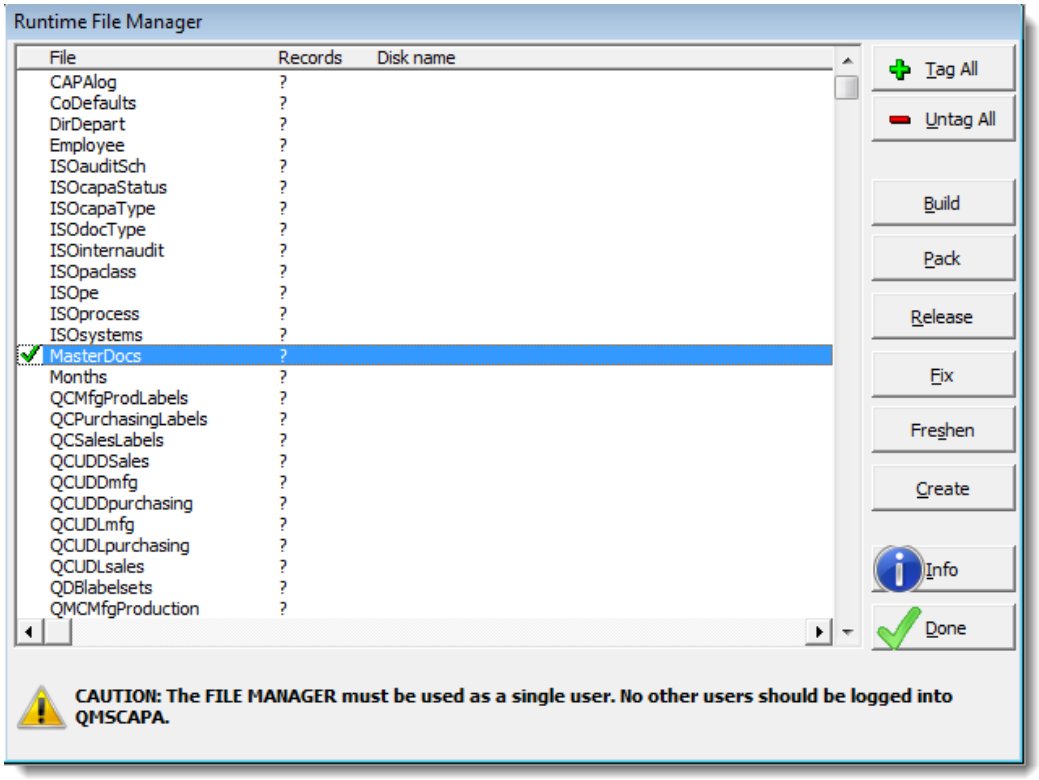


It most cases if QMSCAPA™ encounters a file error the 'error message' to the user will include the file name. Write down the file name and go to the File Manager as shown below. You may need to restart the application.



USER TIP: Use the FILE MANGER as a single user only!



Select the appropriate file with the offending error by using the mouse pointer select or deselect a specific file. Left click on the file name places a check-mark to the left of the file name. First use the Freshen button to

correct the file problem. Other options are described below:

- [Tag All] is used to select all files.
- [UnTag All] is used deselect all files.
- [Build] is used to 'Re-index' the selected file(s).
- [Pack] is used to remove previously 'deleted' records from the selected file (s).
- [Fix] is used to repair the selected file(s). Fix must only be used if the file doesn't come right with Freshen. Don't use Fix on working files, as it can sometimes corrupt them. Fix is your last resort.
- [Freshen] is used to create a new file and copy all the old records out the old file and put them in the new file. Freshen is the best for fixing files, for getting rid of deleted records, and re-building keys all in one. This effectively removes all duplicate entries (which might be causing the Build to fail) and also can act as an effective fixing of possibly corrupted files.
- [Info] is to look-up the quantity of records in the selected file(s) and show the File Path.
- [Create] is used to create a non-existent file.
- [Done] closes the File Manager.

Some database Build, Freshen and Repair functions may need to be done using the standalone File Manager (External).

14.1.1 File Access Error

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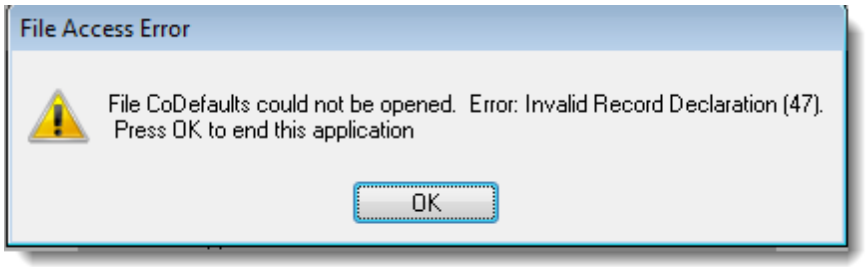
If QMSCAPA ENCOUNTERS FILE ACCESS Error message (QMSCAPA may or may not close down?

Unfortunately, magnetically stored data files can get tweaked and or damaged due to break-downs of hardware and network interruptions.

1. Make sure that you are the only user in QMSCAPA when you attempt to correct a file access problem.
2. Identify the offended file name, which typically appears in a window similar to the one that appears to below.



3. Navigate to FILE > COMPANY SETUP > FILE MANAGER.

4. Locate the offended file file name in the File Manager browse table and mouse-click or check in the empty space left of the file name.
4. Click on the [FRESHEN] button, which will launch a utility application that will compare the file and attempt to recover and/or correct it. The process make take a few moments to a few minutes depending upon the size of the file and the type of corruption that may have occurred. Please wait until the process is complete.
5. Resume using QMSCAPA to learn if the problem reoccurs. If the problem persist return to the File Manager and repeat the steps above but using the [FIX] button.

14.2 File Manager (External)

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The External FILE Manager is a standalone application that must be installed in the same directory as your QMSCAPA™ database files (filename.tps). Therefore, to install **FM3QMS.exe**, most Windows computers will require:

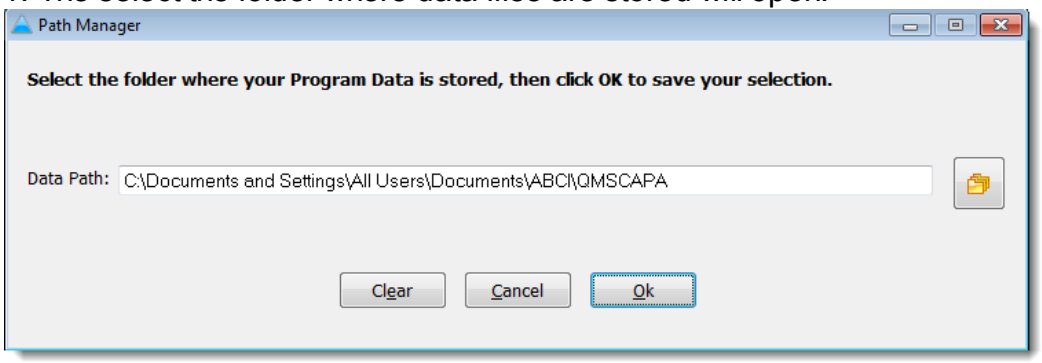
1. An Administrative User login to the computer or server where the QMSCAPA™ database files (filename.tps) are located.
2. All QMSCAPA users should be logged out of the application and all of the databases should not be in use.

It most cases if QMSCAPA™ encounters a file error the 'error message' to the user will include the file name. Write down the file name and go to the File Manager as shown below. You may need to restart the application.

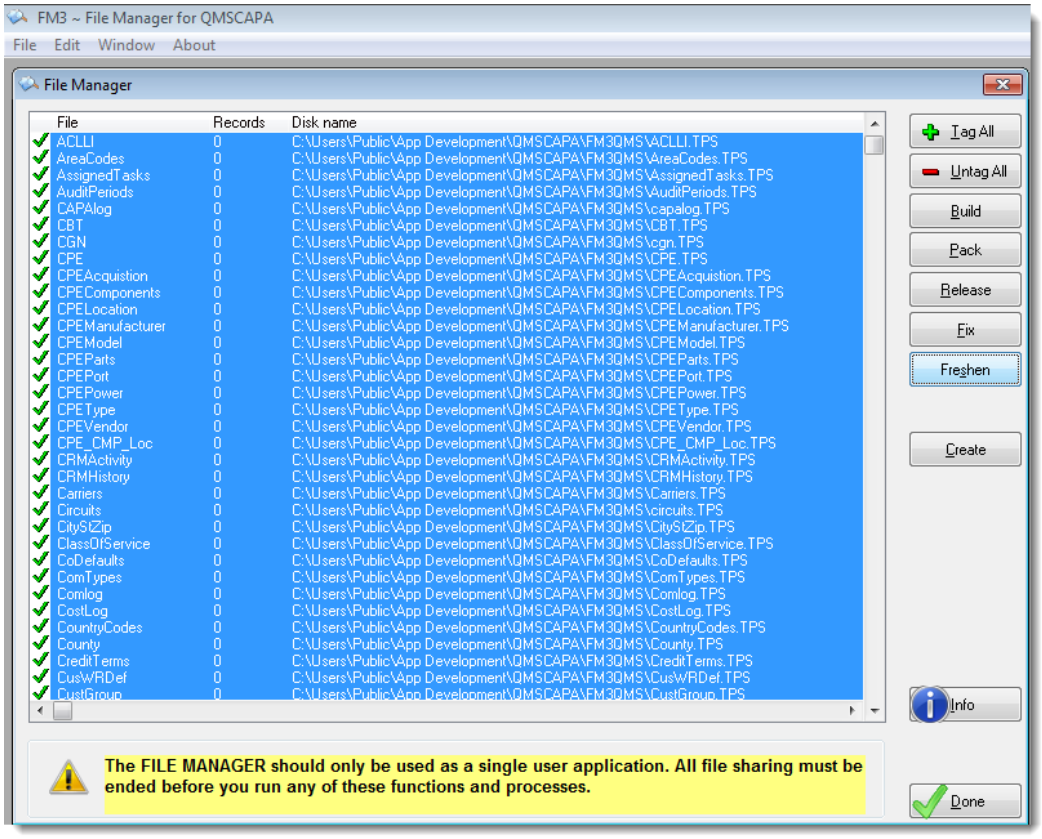
USER TIP: Use the FILE MANGER as a single user only!

When **FM3QMS.exe** is launched:

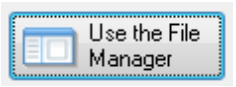
1. The select the folder where data files are stored will open.



2. Once the 'Data Path' is selected all databases are scanned for errors and an attempt is made to automatically correct any problems found.



Once the scan and repair process has completed the application will pause momentarily allowing the user to manually inspect the files.



If you intend to inspect the files manually then click on the **Use the File Manager button**.

Select the appropriate file with the offending error by using the mouse pointer select or deselect a specific file. Left click on the file name places a check-mark to the left of the file name. First use the Freshen button to correct the file problem. Other options are described below:

- [Tag All] is used to select all files.
- [UnTag All] is used deselect all files.
- [Build] is used to 'Re-index' the selected file(s).
- [Pack] is used to remove previously 'deleted' records from the selected file (s).
- [Fix] is used to repair the selected file(s). Fix must only be used if the file doesn't come right with Freshen. Don't use Fix on working files, as it can sometimes corrupt them. Fix is your last resort.
- [Freshen] is used to create a new file and copy all the old records out the old file and put them in the new file. Freshen is the best for fixing files, for

getting rid of deleted records, and re-building keys all in one. This effectively removes all duplicate entries (which might be causing the Build to fail) and also can act as an effective fixing of possibly corrupted files.

- [Info] is to look-up the quantity of records in the selected file(s) and show the File Path.
- [Create] is used to create a non-existent file.
- [Done] closes the File Manager.

14.3 Spell Check

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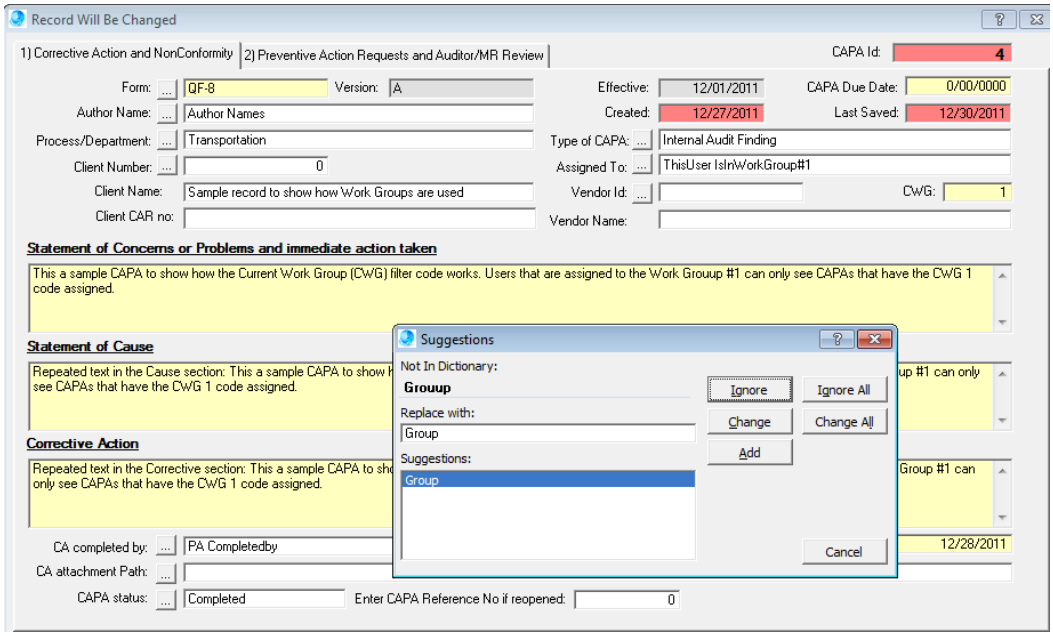
F7 = Spell Check

***Spell Check** is available on many of the window forms that contain text fields:

1) Click inside the text field and then press the **'F7 key'**;
2) The 'F7 key' will open the spelling suggestions window with options to Ignore, Change, Add, Ignore All, Change All and/or Cancel. Optionally a word can be typed directly into the [Replace with] field.



***Spell Check** requires Microsoft Office installed on the client computer.

15 Vendor Table

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The Vendor Table may be accessed through the File > Company Setup menu, or through the CAPA edit window.

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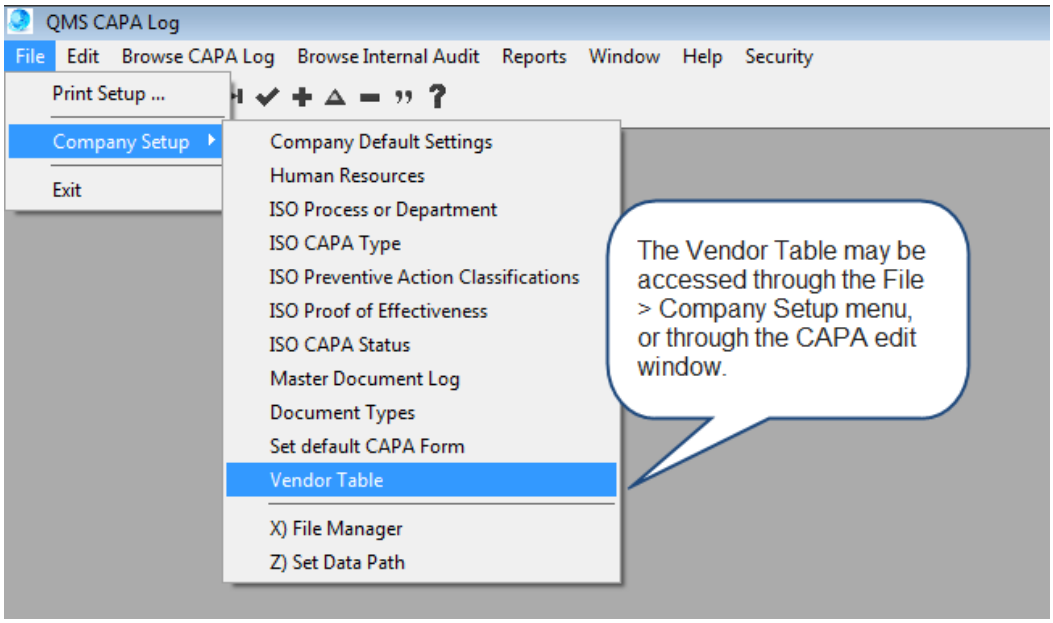
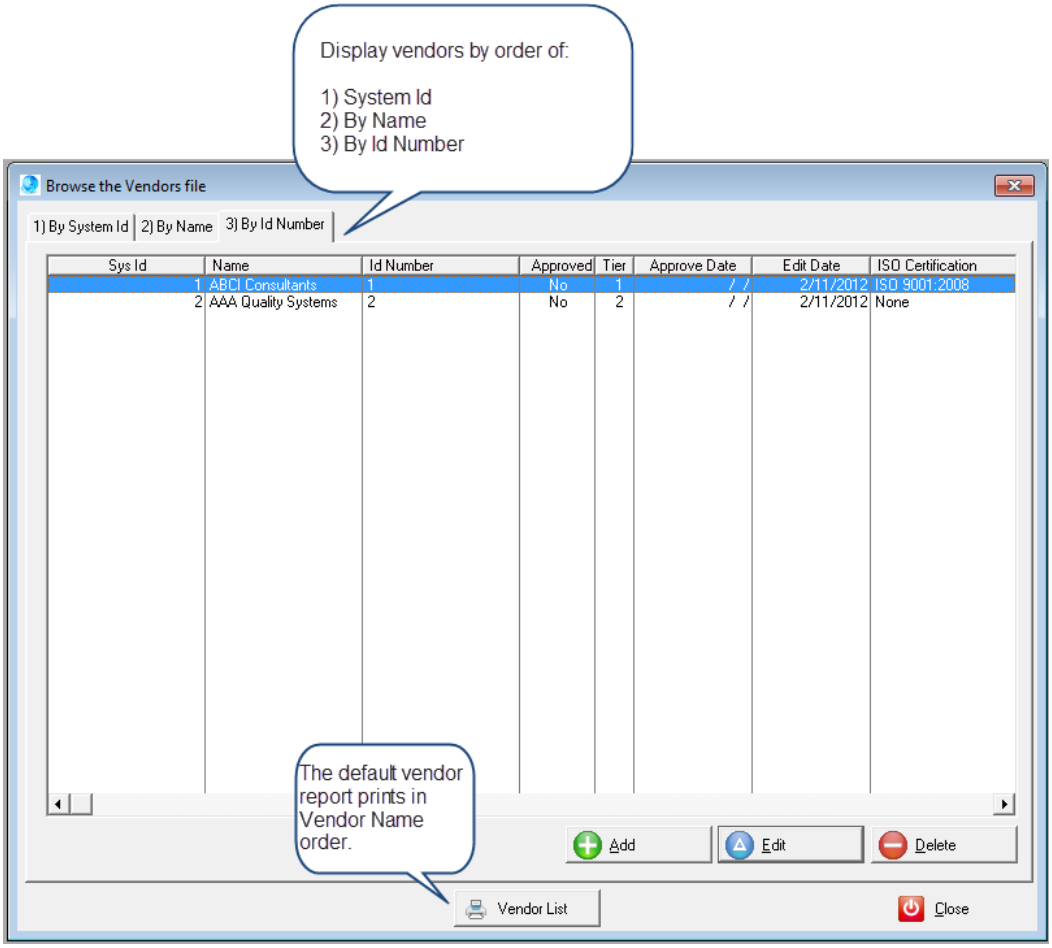


The Vendor Table window is displayed below:



Related topics: Vendor Edit Window; Vendor Reports.

15.1 Vendor Edit Window

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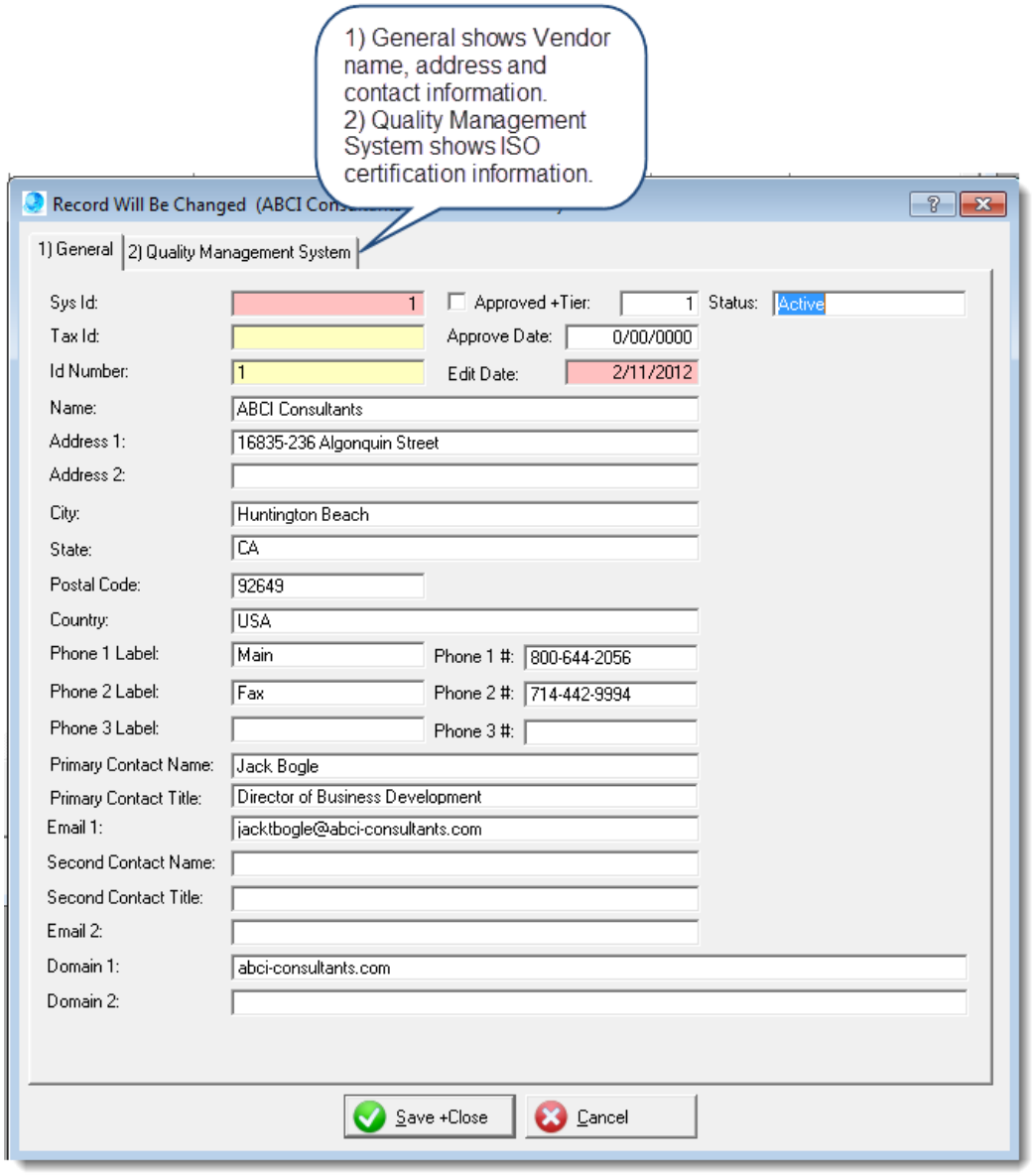
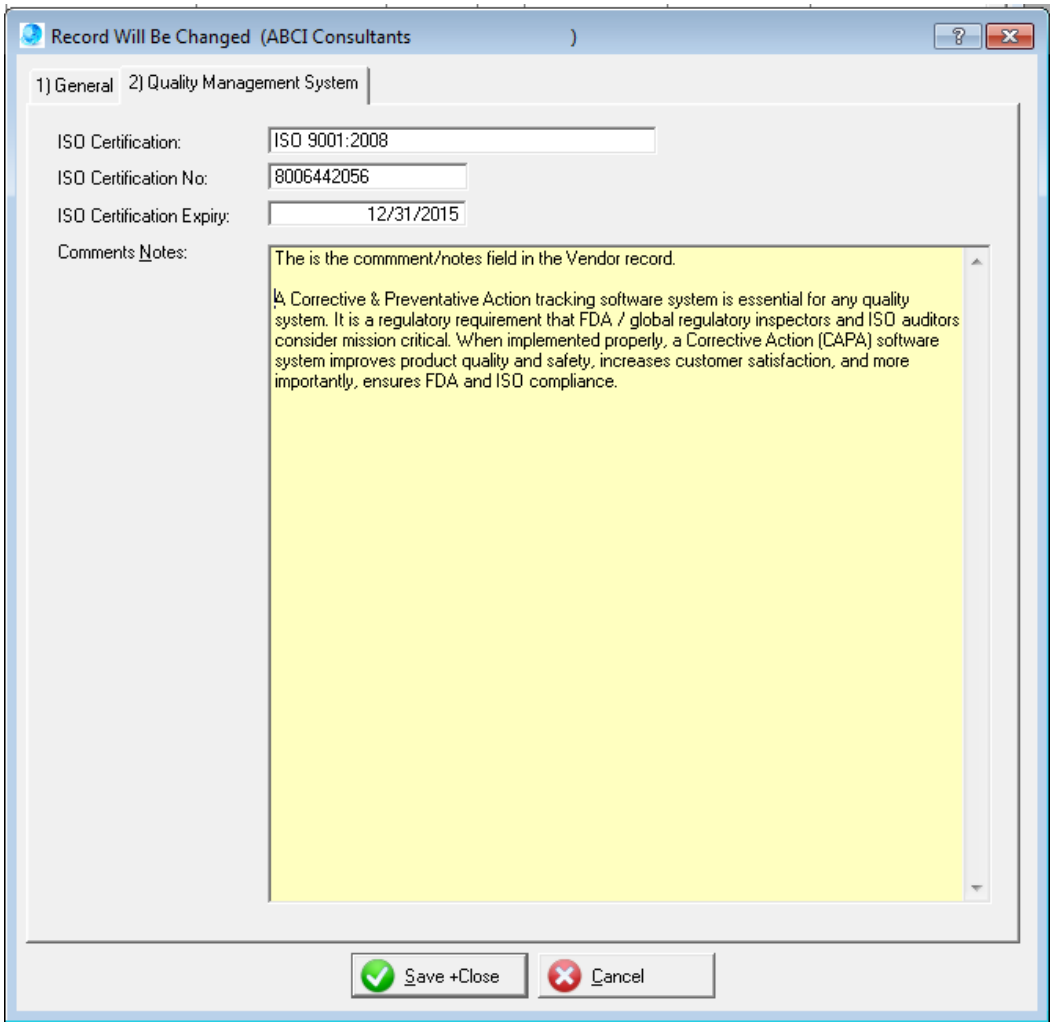
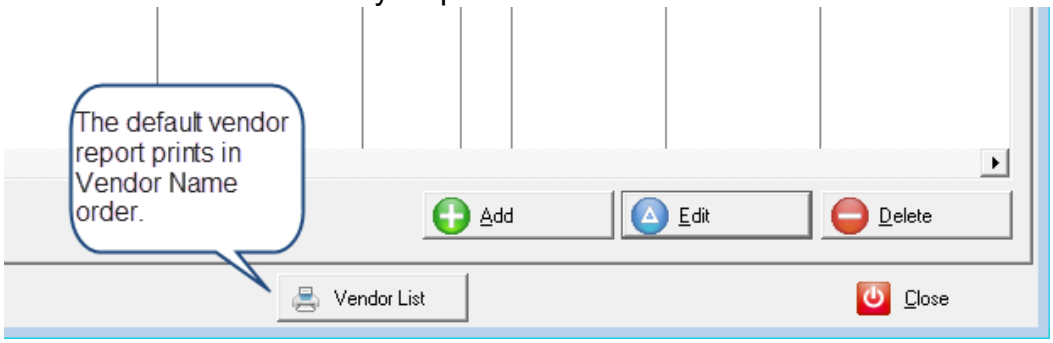


1) The General tab shows Vendor name, address and contact information.
2) The Quality Management System tab shows ISO certification information.



15.2 Vendor Reports

The default Vendor List may be printed from the Vendor Table window.



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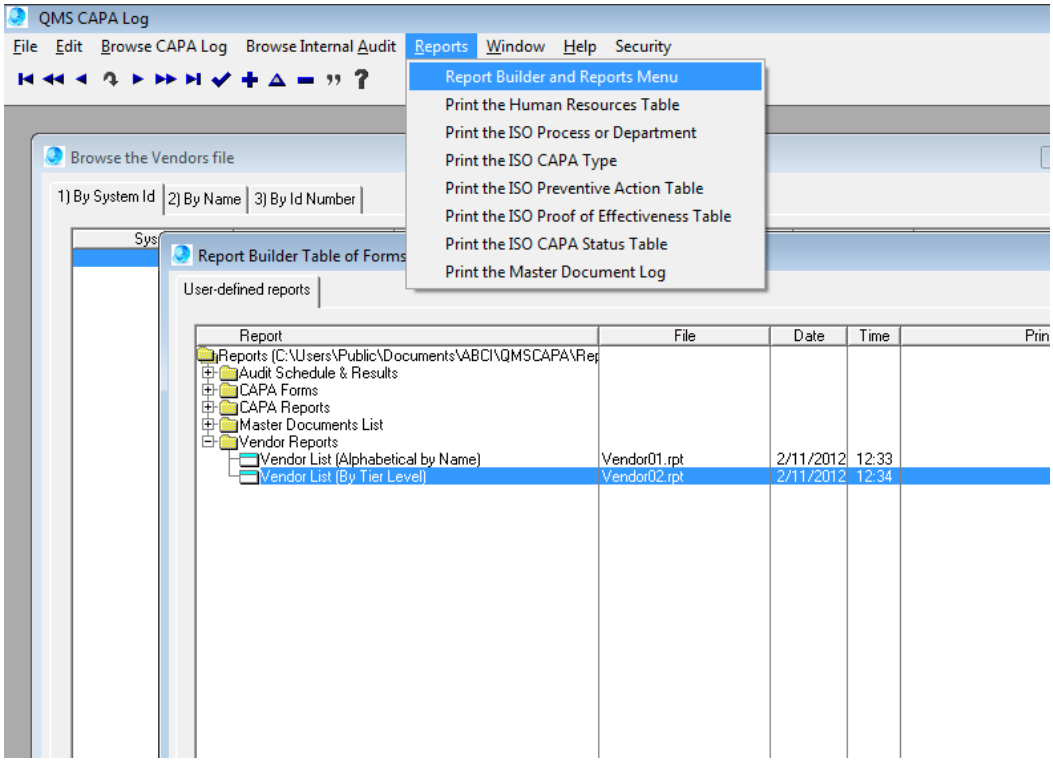
Additional Vendor Reports may be accessed through the Reports > Report Builder and Reports Menu as shown below:



15.2.1 Sample Vendor Report

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Vendor List (By Tier Level)

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Tier Level 1 Vendors

ABCI Consultants 16835-236 Algonquin Street Huntington Beach CA 92649 USA Contact Information: --- Jack Bogle, Director of Business Development Phone 1: Main:800-644-2056 jackbogle@abci-consultants.com , Phone 2: Fax:714-442-9994	Vendor Id Number: 1 Vendor Approved: No Vendor Status : Active Vendor Tier Level: 1 Vendor QMS : ISO 9001:2008 ISO Certification # : 8006442056 Certification Expiry: 78530

Comments: The is the commment/notes field in the Vendor record.

Tier Level 2 Vendors

AAA Quality Systems 222 East Clinton Street Suite W9 Anaheim CA 92870 USA Contact Information: --- Jim Beam, President Phone 1: Office:800 840 9439 jimbeam@qualitymanagementsystems.us , Phone 2: Cell:800 675 2415	Vendor Id Number: 2 Vendor Approved: No Vendor Status : New Vendor Tier Level: 2 Vendor QMS : None ISO Certification # : None Certification Expiry: 0

Comments: ISO Standards and certifications are very sound management systems recognized worldwide for giving a business the competitive edge, client confidence and market place leverage.

All whom are concerned about providing excellent Customer Satisfaction for a product or service.
All whom are concerned about improving quality of a product or service.
All whom are concerned about reducing the cost and waste of providing a product or service.
All whom are concerned about the environment and the carbon footprint of providing a product or service.
All whom are concerned about the occupational health and safety of their citizenry in providing a product or service.
All whom are concerned about business continuity in the event of an emergency or disaster.
All whom are concerned about the security of intellectual property, proprietary trade secrets and privacy of its customers.

Page 1 of 1

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16 Appendix

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Accredited ISO Certifying Bodies

Consulting for International Management Systems

ISO Lead Auditor Training

- ISO 9001 Training
- ISO 14001 Training
- ISO 18001 Training
- ISO 27001 Training

Quality Management Resources

- Quality Management Software
- ISO 9001 Quality Manual Template
- ISO 14001 Requirements Guide
- ISO 18001 Requirements Guide
- ISO 27001 Requirements Guide

16.1 Framework & Layout

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Index

- A -

About Security 62
Actual Received Date 42
Actual Ship Date 42
Assigned to 26
audit log 54
Audit Plan File Relationships 54
Audit Plan is Copied 55
Audit Plan Relationships 54
Audit Plan Window Form 55
Audit Plans 5, 54
Audit Results Log 60
Audit Schedule 54, 59
Audit Table displays 60
auditor records 54
Auto Resize Bottom 79

- B -

BAND 79
bands 69
Before Band Printing 82
Browse CAPA Log 24

- C -

CAPA status 19
CAPA Types 17
Case Number 33
CELL 79
Classifications 18
client number and name fields 33
Complaint Id Number 33
Complaint Status 33
Completed checkbox 37
copy a customer complaint to the CAPA 32
copy an Audit Schedule 55
Copy Complaint to CAPA button 32
Corrective Actions 33
create a Training Record 95
create or edit a Training Program 93
CUSTOMARY 79
CUSTOMARY FRAME 79
Customer Complaint form 33
Customer Complaints 1
Customer Due Date 42
Customer Id field 37

- D -

Dashboard for Monitoring Quality 1, 5
Dashboard for Quality Monitoring 37
Dashboard Label Sets 49
Dashboard print button 53
database 67, 70
database filter 73
default data path 12
default printer 24
Departments 16
dictionary 83
Document Version History 5
document version history table 21
Download User Guide as PDF 9

- E -

Edit/View ISO Audit Schedule 55
element 54
enroll students 99
Explicit Page Overflow 82
Expressions 73

- F -

F7 = Spell Check 106
File Manager (External) 101, 104
FIRST RUN option 22
First User 13, 62
FM3QMS.exe 104
Forcing a New Report Page 82
Formulas 73
FRAME 69, 79, 83
FRAME TYPES 79
Frames 69

- G -

Global Field 73
Group Band Properties 82

- H -

Human Resources 15

- I -

Include for Report Tally checkbox 33
Internal Audit Plan 54
Internal Audit schedule 5, 54

- L -

Label Set field 39
log customer complaints 31
Login 12, 62

- M -

MAIL MERGE 79
make a copy of an Audit Plan 55
Manufacturing & Production Quality Metrics Calculator 1
Manufacturing and/or Production Calculator 37
master document index 1
Metric Label fields 39
Mfg. & Production Calculator Form 39
Multiline Text 79

- O -

on screen audit schedule 60
On-time Delivery Analysis Report 43
On-Time Delivery Calculator 1

- P -

Page layout 73
Password 12, 62
Preventive Action Request 18
print Customer Complaint reports 34
Print form button 32
Print log button 32
Proof Effectiveness 26
Purchasing Quality Calculator 37
Purchasing Quality Metrics Calculator 1, 5

- Q -

QMS Dashboard 47
QMS Procedures 16
QMSCAPA user group 8
QMSCAPA.EXE 22
quality management software 5
quality management systems 5
quality managers 5
quality professionals 5

- R -

Recorded in CAPA log checkbox 33
Report Builder 65, 67
Report Builder Menu information and a Record filter. 73
report formatter 69
Report Properties 73
Reviewed by Mgr 26
root cause 26
ROTATION ANGLE 79

- S -

Sales Quality Calculator 37
Sales Quality Metrics Calculator 1, 5, 46
schedule a Training Program 99
security 12
Security Setting 64
Select Survey Results summary score 38
Selected Survey Results 38
Ship by Date 42
Sorting Bands 81
Spell Check 5
Statement of Cause 26
Statement of Concern 26
Status Updated 33
Survey Form 38
Survey Summary Results for ALL surveys 38

- T -

Trained Students 92
Training Elements 93, 94
Training Programs 5, 92

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training records 95
Training Schedule 92

- U -

Use the File Manager button 104
User Defined Label field 39

- V -

Vendor Table 106
Verified by 26
Verified date 26
Version History tab 20

- W -

web form 5
what's new 1
what's planned 1
Work Group 24