

Your guide to QMS Connect Lite

Find your favourite features.

We've now moved across all of the documents you had previously stored on your Launchpad account, so once you're set up on **QMS Connect Lite**, it's time to find your favourite features and get to grips with your new platform!

To help you get started, here's a quick guide to the top functions.



Your home screen

Your home screen contains all you need to navigate around your new platform.

On the homepage you will see a handy summary of your system as well as a section that highlights any upcoming appointments you have. There is also a shortcut to your ISO certification marks.

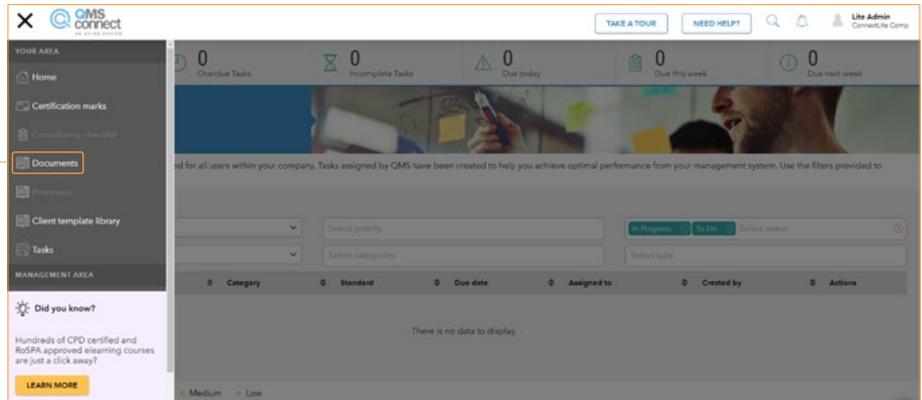
The screenshot shows the OMS Connect home screen. At the top left is the OMS Connect logo and a hamburger menu icon. To the right are buttons for 'TAKE A TOUR' and 'NEED HELP?', along with search, notification, and user profile icons. Below the header is a banner with the text 'Good afternoon! It's Thursday, 11/10/2018' and a background image of people smiling. The main content area is divided into three columns: 'System summary' with links for ISO visit reports, Non-conformance tasks, Manuals, Active certificates, Overdue tasks, and Users; 'Certification marks' showing two ISO 9001:2015 Registered certificates; and 'Upcoming appointments' with a 'Looks like you're up to date' message. Below these are three promotional cards: 'A conversation could earn you £100', 'Need help with your HR or H&S compliance?', and 'Save money as an existing customer'.

To navigate to the main menu for more options, simply click on the symbol in the top-left corner.

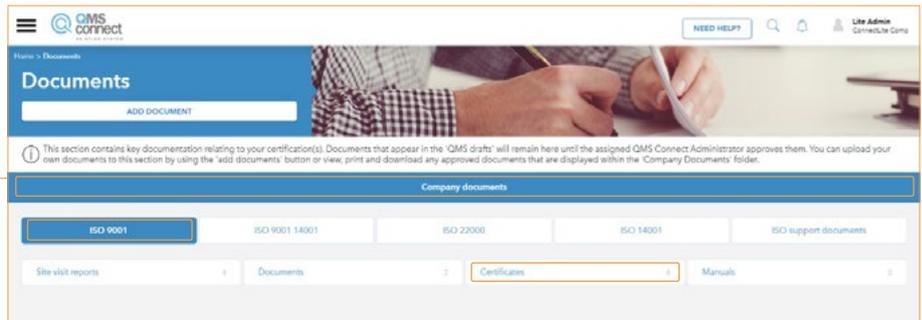
This screenshot is identical to the one above, but with a red rectangular box highlighting the hamburger menu icon in the top-left corner of the page header.

ISO certificates

To get your ISO certificates, head to the main menu and then click 'Documents'.



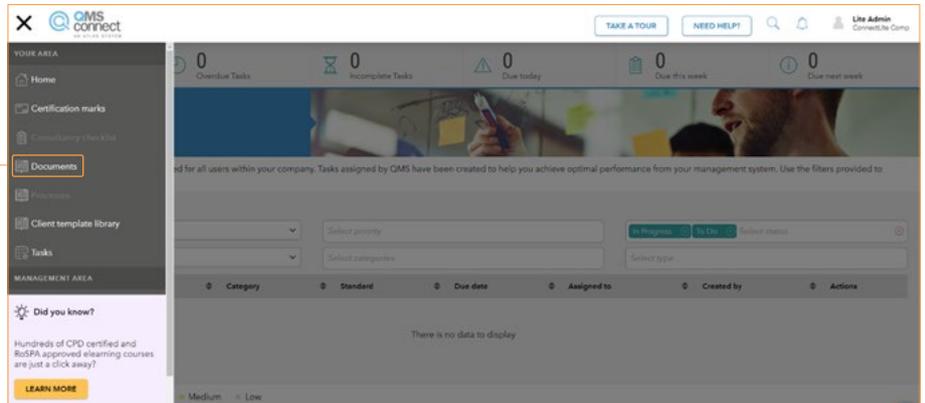
In Documents, select 'Company Documents' and then your ISO. Click on the 'Certificates' tab to reveal your stored certificates.



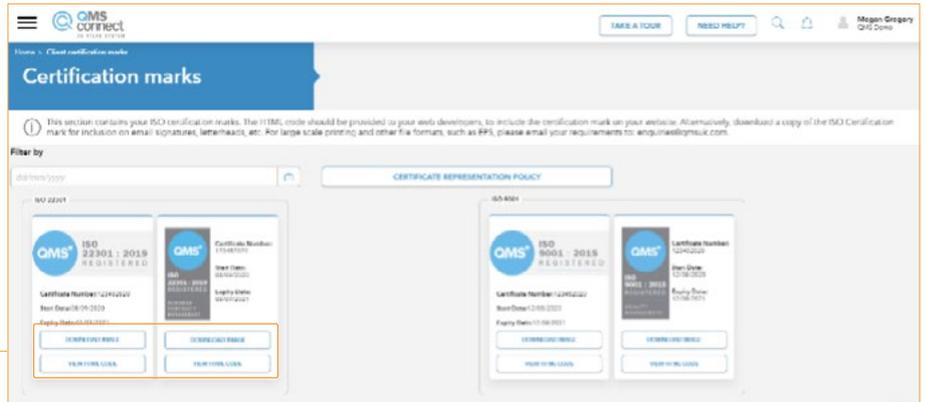
Certification marks

You can download your certificate marks (badges) as jpegs or view their HTML code just as easily from QMS Connect Lite as you did in Launchpad.

To access them, head to the main menu and select 'Documents'.

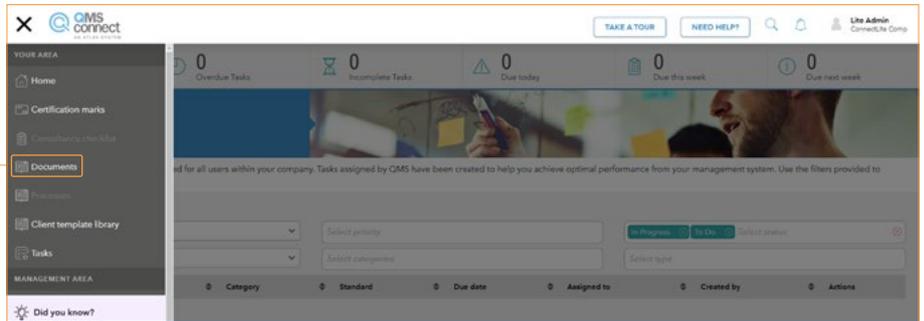


Once you have opened up Documents, you need to select 'Certification Marks'. You can then choose those that you wish to download.

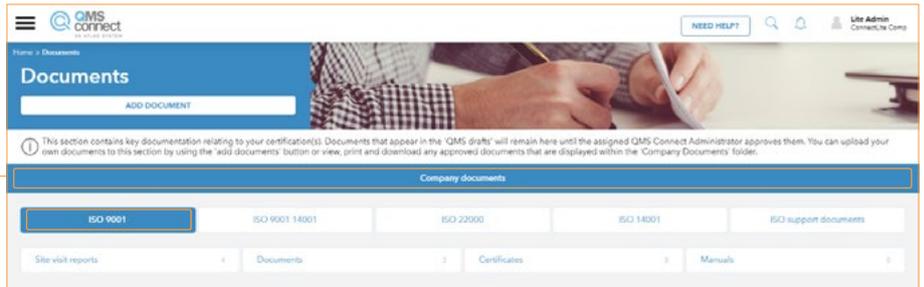


ISO management system

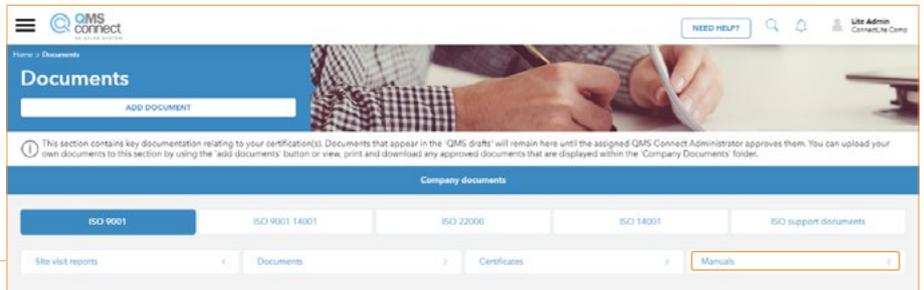
We've created a folder for your management system. To find them, head to the main menu and then select 'Documents'.



Once you're in Documents, click on 'Company Documents' and select your ISO.



Then select the 'Manuals' tab.



Tasks

From time-to-time QMS will assign you tasks to help you maintain your ISO compliance. You can view these tasks at any time in the Tasks section.

To find them, go to the main menu and select 'Tasks'.

Home > Tasks

0 New Tasks | 0 Overdue Tasks | 0 Incomplete Tasks | 0 Due today | 0 Due this week | 0 Due next week

Tasks

This section contains tasks assigned for all users within your company. Tasks assigned by QMS have been created to help you achieve optimal performance from your management system. Use the filters provided to help you identify specific tasks.

Filter by

My Tasks | Select priority | In Progress | To Do | Select status | Select categories | Select type

Title	Status	Category	Standard	Due date	Assigned to	Created by	Actions
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Templates

You'll still have access to all the downloadable templates you used on Launchpad. To find them, head over to the main menu and select 'Client Template Library'. From here, choose 'ISO Template Library'.

Home > Client template library

Client template library

This section contains all of your ISO Templates. New blank templates provided by QMS can be created and customised from within in the ISO Template Section. Already customised templates can then be edited from within the ISO Document section. Once you have input the content, you are able to print and download the output or view it on screen using the Preview function.

ISO template library

Filter by

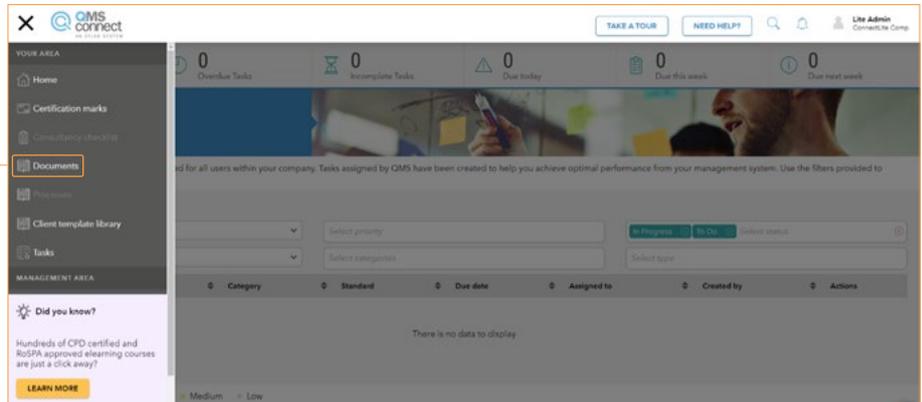
Filter by template title | Filter by clauses

Title	Products	Clauses	Actions
Appendix C - Initial Meeting Agenda - Recovery Team	Business Continuity	N/A	DOWNLOAD
Appendix F - Business Continuity Incident Log	Business Continuity	N/A	DOWNLOAD
Appendix G - Damage Assessment Template	Business Continuity	N/A	DOWNLOAD
Approved Supplier Register	MS-ISO 9001:2015 / ISO 27001:2013,General,ISO 27001 : 2013,MS ISO 9001:2015 / ISO 14001:2015 / ISO 45001:2018,MS ISO 9001:2015 / ISO 45001:2018,MS ISO 9001:2015 / ISO 14001:2015,ISO 9001:2015	N/A	DOWNLOAD
Asset Register	MS ISO 9001:2015 / ISO 27001:2013,BS 10012 : 2017 + A1 : 2018,ISO 20032:2018,MS ISO 27001:2013 / ISO 20000-1:2018,MS ISO 27001:2013 / ISO 27791:2019,ISO 20232:2012,ISO 27001 : 2013,ISO 17201:2019,BS 10011 : 2017,BS 10012:2017+A1:2018,MS ISO 27001:2013 / ISO 22301:2019 / ISO 30000-1:2018,ISO 14001:2015,MS ISO 27001:2013 / ISO 22301:2019	N/A	DOWNLOAD
BCMS Incident Log	ISO 22301/ISO 22301-2019,BS 22301 : 2012	N/A	DOWNLOAD

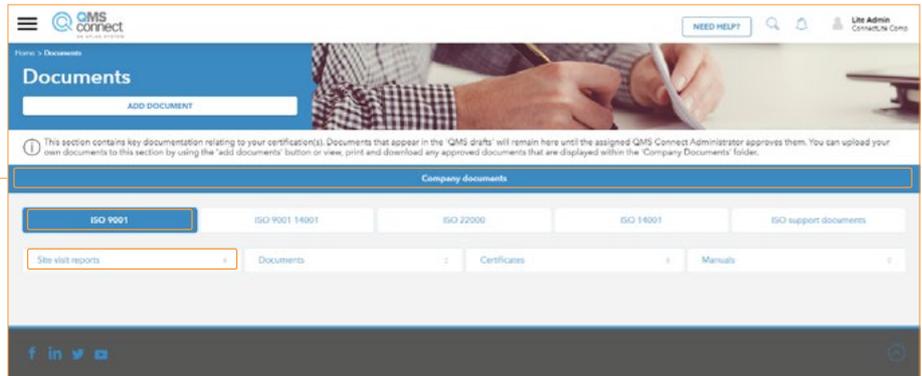
Viewing site visit reports

A new feature that you gain from moving to QMS Connect Lite is access to your site visit reports. This means that you will be able to see the notes made during your surveillance audits.

To view them, head to the main menu and select 'Documents'.



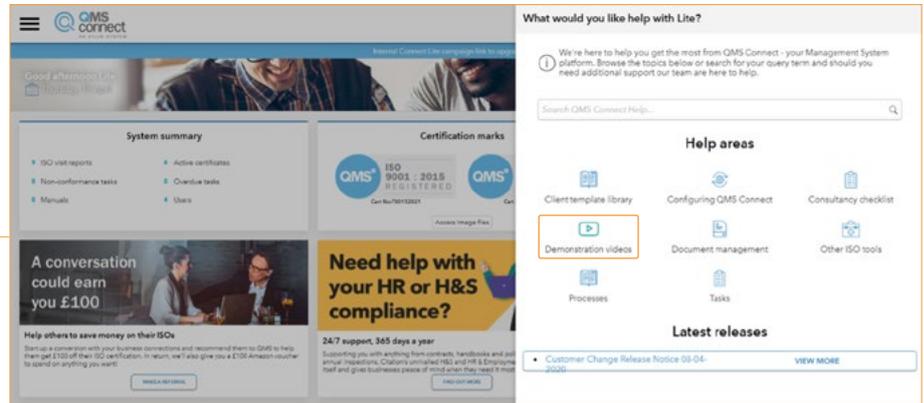
You then need to select 'Company Documents' and your ISO product. Once these have been selected, you can click on your Site Visit Reports and access your copy.



Tutorials

You can still access all the tutorial help you need in the QMS Connect Lite platform.

To find the tutorial videos, select 'Help' on the platform's homepage. From here you can select 'Demonstration video' to access the guidance you need.



The screenshot shows the QMS Connect Lite help page. The top navigation bar includes the QMS Connect logo and a search bar. The main content area is divided into several sections: 'System summary' with links for ISO visit reports, non-conformance tasks, manuals, active certificates, overdue tasks, and users; 'Certification marks' for ISO 9001:2015; and a 'Help areas' section with a search bar and a grid of icons for 'Client template library', 'Configuring QMS Connect', 'Consultancy checklist', 'Demonstration videos' (highlighted with a red box), 'Document management', 'Other ISO tools', 'Processes', and 'Tasks'. A 'Latest releases' section at the bottom features a 'Customer Change Release Notice 03-04-2020' with a 'VIEW MORE' link.

Need more help?

If you need more help getting to grips with your new platform, there is a comprehensive 'Help' function that can be accessed on the QMS Connect Lite homepage.

If you still can't find what you're looking for, do get in touch!

Phone: Call us on **01603 630345**

Email: Write to us at enquiries@qmsuk.com

Chat: Send us a message in chat on our website at www.qmsuk.com

