



Quality Management Training Agenda for



QUALITY MANAGEMENT SOFTWARE

Day One: Administration

Goal: To provide the QSI Administrator with understanding and hands-on experience with administering and configuring the QSI System.

System Overview: 1 Hour

Conceptual overview of the product; databases, users, replication (very brief), potential uses.

(**Note:** This does not supplant the need for Lotus Notes Administration Training or other Notes training that your organization may require.)

System Installation and Configuration: 2 Hours

1. Administrative Utility
2. Installation
3. Access Control Lists
4. Agents

User Application Notes Database: 15 Minutes

1. Creating and distributing application notes (these document any customization, code changes, to the base system in the future.)

Web Functionality: 1 Hour

1. Accessing the portal
2. Acknowledging training
3. Creating CARs and NCMRs
4. Setting up complaint and supplier corrective action access for external users
5. Calibration and Maintenance Records
6. Accessing course offerings

Information Catalog: 3 Hours

1. Configuring your QSI System

General Archive Databases: 15 Minutes

1. Archiving functionality

Day Two: Database Training

Goal: To provide the QSI Administrator with understanding and hands-on experience with administering and configuring the QSI System.

Portal Databases: 15 Minutes

Reference Databases: 15 Minutes

1. ISO Encyclopedia, how to navigate, print and utilize this database
2. QSI System User Manual

Document Control: 5 Hours

Creation, approval and management of controlled documentation.

1. Quality Manual
2. Document Control:
 - Views
 - Create
 - Process Mapping
 - Paper Distribution Records
 - Review and Approval Process - Serial/Parallel
 - Cancel Review/Approval Process
 - Editing and Changing Documents
 - Managing distribution of paper copies
 - Importing from other document sources
 - Linking, attachments, and embedding
 - Configuration and use of Customizable Subforms
3. Document Archives
4. Released Documents
5. Approved but Unreleased Documents
6. Auto deletion and copy to Released and Archive
7. Specification Control
8. Draft Documents Database (for FDA only)

Meeting Databases: 30 Minutes

1. Material Review Board:
 - Creating an agenda
 - Creating meeting minutes and action items
 - Reviewing NCMRs
2. Management Review:
 - Creating an agenda
 - Creating meeting minutes and action items
 - Updating and reviewing Quality Objectives
 - Updating and reviewing sections of the Quality Manual
3. Design Review:
 - Creating an agenda
 - Creating meeting minutes and action items
 - Approval of meeting minutes
4. Scheduling Meetings
5. General for all meeting databases using meeting databases with Notes calendar:
(Note: This functionality available for Lotus Notes users only.)

Quality Targets and Objectives: 30 Minutes

1. Create Objective
2. Create Target
3. Create Project Tasks
4. Create Action Items
5. Create Measures Tracking Record

Day Three: Database Training

Corrective Action: 1 Hour

1. Creating
2. Assigning/reassigning
3. Tracking, closing, approval, and escalation

Internal Assessment: 1 Hour (Includes Supplier Assessment and Customer Survey)

1. Gap Analysis:
 - Use this database to look for gaps between your quality system and the standard
2. Compliance Auditing:
 - Creating checklists based on your own documentation for Internal Assessment of your organization's compliance
3. Findings, Corrective Actions, Preventive Actions, and Reports
4. Scheduling

Shelf Life: 30 Minutes

1. Entering Product Information
2. Printing Labels
3. Set Expiration Dates
4. Purge of Expired Material
5. Requalification of Material
6. Disposal Requirements
7. Escalation

Quality Awareness: 15 Minutes

1. Setting up discussion topics
2. Responding to discussion topics

Product Catalog: 15 Minutes

1. How to construct entries
2. How to perform a basic import



Quality Management Training Agenda

QUALITY MANAGEMENT SOFTWARE

Nonconforming Material and Waivers: 1 Hour

1. Nonconforming Material Reports:
 - Documenting Nonconforming Product or Process
 - Dispositioning material
 - Internal and Supplier Corrective Actions
2. Product Waivers
3. Process Waivers

Inspection and Test: 30 Minutes

1. Creating an approved test procedure
2. Creating a record to document inspection and test results
3. Creating a nonconformance report

Customer Management / Supplier Management: 1 1/2 Hours

1. Creating supplier types, requirements, and criteria
2. Creating a customer/supplier profile
3. Supplier Corrective Action/Customer Complaints
4. Approved Supplier Lists
5. Supplier Surveys

Day Four: Database Training

Customer Requirements: 15 Minutes

1. Creating a contract review record
2. Creating a contract change notice

Spare Parts Catalog: 30 Minutes

1. Setting up Spare Parts entries, including minimum threshold levels

Calibration and Maintenance: 1 Hour

1. Setting up equipment records
2. Primary and transfer standards
3. Equipment under control for calibration and preventative maintenance
4. Creating calibration/preventative maintenance records
5. Alarms, alerts and escalation
6. Calibration feedback reporting
7. Request for Maintenance



Quality Management Training Agenda

QUALITY MANAGEMENT SOFTWARE

General Process Change Management: 30 Minutes

Creating a record of a process change:

- Establishing criteria for change consideration
- Change Management
- Monitoring the effectiveness of implemented changes

Project Task Management: 30 Minutes

How to set up projects:

- Assign tasks
- Track progress on project

Engineering Change Orders: 45 Minutes

1. Design Suggestions
2. Creating and approving engineering change requests
3. Creating and assigning an engineering change order
4. Completing tasks and sending an engineering change notification

Design Process Management: 1 Hour

1. Creating on-line engineering/project management notebooks for all projects
2. Setting up project definitions
3. Project phases
4. Project deliverables
5. Project approvers
6. Creating a discussion database for the project

Employee Training Records and Course Offerings: 1 1/2 Hours

1. Creating Company and Department Core Training Requirements
2. Creating Job positions
3. Creating Employee Records
4. Creating courses, scheduling, and recording training
5. Updating employee training records
6. Creating courses, scheduling, and recording training
7. Software development specific options (code reviews)

Day Five: Database Training (Optional)

Additional Databases: 5 Hours

1. Automotive Databases
2. Environmental Databases
3. OH&S Databases