



# **Quality Systems Assessment**

# Table of Contents

<b>CHAPTER 1 – APPLICATION OVERVIEW .....</b>	<b>3</b>
QUALITY SYSTEM ASSESSMENT (QSA) ARCHITECTURE .....	3
SOFTWARE REQUIREMENT .....	4
QSA ONLINE LOGIN.....	5
TAB NAVIGATION .....	6
BREADCRUMB NAVIGATION .....	8
APPLICATION ICONS .....	9
<b>CHAPTER 2 – MANAGE SUPPLIERS .....</b>	<b>11</b>
SEARCH SUPPLIERS .....	11
ADD NEW SUPPLIER.....	12
EDIT SUPPLIER INFORMATION .....	13
PRINT SUPPLIER SURVEYS .....	14
DELETE SUPPLIER .....	15
<b>CHAPTER 3 – MANAGE SURVEYS .....</b>	<b>16</b>
ADD SURVEY.....	16
ASSIGN ELEMENT .....	17
PRINT SURVEY .....	18
PRINT ELEMENT .....	19
PRINT BLANK SURVEY CHECKLIST .....	20
EMAIL BLANK SURVEY CHECKLIST .....	21
DOWNLOAD SURVEY.....	22
UPLOAD SURVEY .....	25
UNLOCK SURVEY .....	27
UNLOCK SURVEY .....	28
COMPLETE SURVEY.....	29
EMAIL NOTIFICATION FOR COMPLETED SURVEY .....	30
DELETE SURVEY .....	31
UPLOAD ATTACHMENT.....	32
SUBMIT AUDIT REQUEST .....	33
APPROVE AUDIT REQUEST .....	34
SCHEDULE AUDIT .....	35
<b>CHAPTER 4 – MANAGE CORRECTIVE ACTION REQUESTS.....</b>	<b>36</b>
ADD CORRECTIVE ACTION REQUEST .....	36
CAR ISSUANCE NOTIFICATION .....	37
ADD CORRECTIVE ACTION REQUEST COMMENTS.....	38
EDIT CORRECTIVE ACTION REQUEST COMMENTS .....	39
CAR RESPONSE NOTIFICATION .....	40
UPLOAD REFERENCED FILE.....	41
PRINT CORRECTIVE ACTION REQUEST .....	42
CLOSE CORRECTIVE ACTION REQUEST.....	43
30, 60, & 90 DAYS DELINQUENT CAR ALERT .....	44
<b>CHAPTER 5 – QSA EDITOR.....</b>	<b>45</b>
INSTALL QSA EDITOR.....	45
LAUNCH QSA EDITOR.....	50
UPDATING DOWNLOADED SURVEY .....	51
UPDATE DOWNLOADED SURVEY.....	52
<b>APPENDIX A - USER PERMISSIONS .....</b>	<b>53</b>



## Quality System Assessment (QSA) Architecture

QSA is a web application designed by the Parker Aerospace Group to automate the supplier assessment process. It includes business and general information about each supplier Parker uses, as well as standardized checklists to cover all assessment tasks — from evaluating a supplier’s quality management system (QMS) to evaluating a special process, such as heat treatment, plating, etc. — for compliance to the applicable specification. It can also be used for internal assessment activity.

All QSA checklists are based on current revisions of industry-accepted quality management system (QMS) standards such as SAE AS9000, AS9100, AS9101, AS9120, etc. All special process checklists are based on current process specifications. If necessary, division-specific requirements and checklists can be incorporated when there is a need. As new requirements emerge or existing standards change, the system will be updated to reflect the current business requirements.

In addition, the application includes provisions for initiating corrective action in response to deficiencies identified during assessment. The supplier, or internal organization, will be notified electronically (via e-mail) and have an opportunity to reply electronically. The corrective action process is dynamic and as information flows to and from the supplier and Parker, it will be captured and added to the database until the corrective action is accepted and closed.

The assessment results and all corrective action data will be stored in a master database, readily available to anyone who has a QSA login account, including suppliers. The plan is to store all data that contains at least two prior assessment results in order to provide history and a basis for a continuous improvement program.

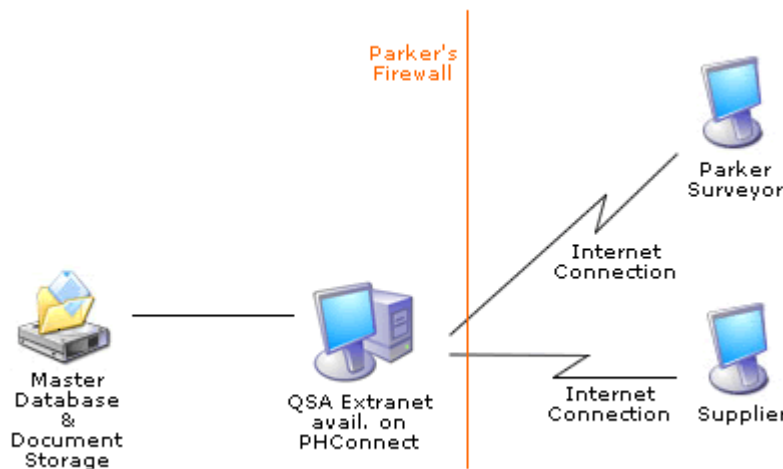


Figure 1 – Schematic of QSA System Architecture

# Chapter 1 – Application Overview

## Software Requirement

Surveyors and Suppliers will need one of the following browsers to work with QSA.

- Internet Explorer (IE) 6.0 or greater  
<http://www.microsoft.com/windows/ie/downloads/critical/ie6sp1/default.asp>
- Mozilla Firefox 1.0.6 or greater <http://www.mozilla.com/en-US/firefox/>

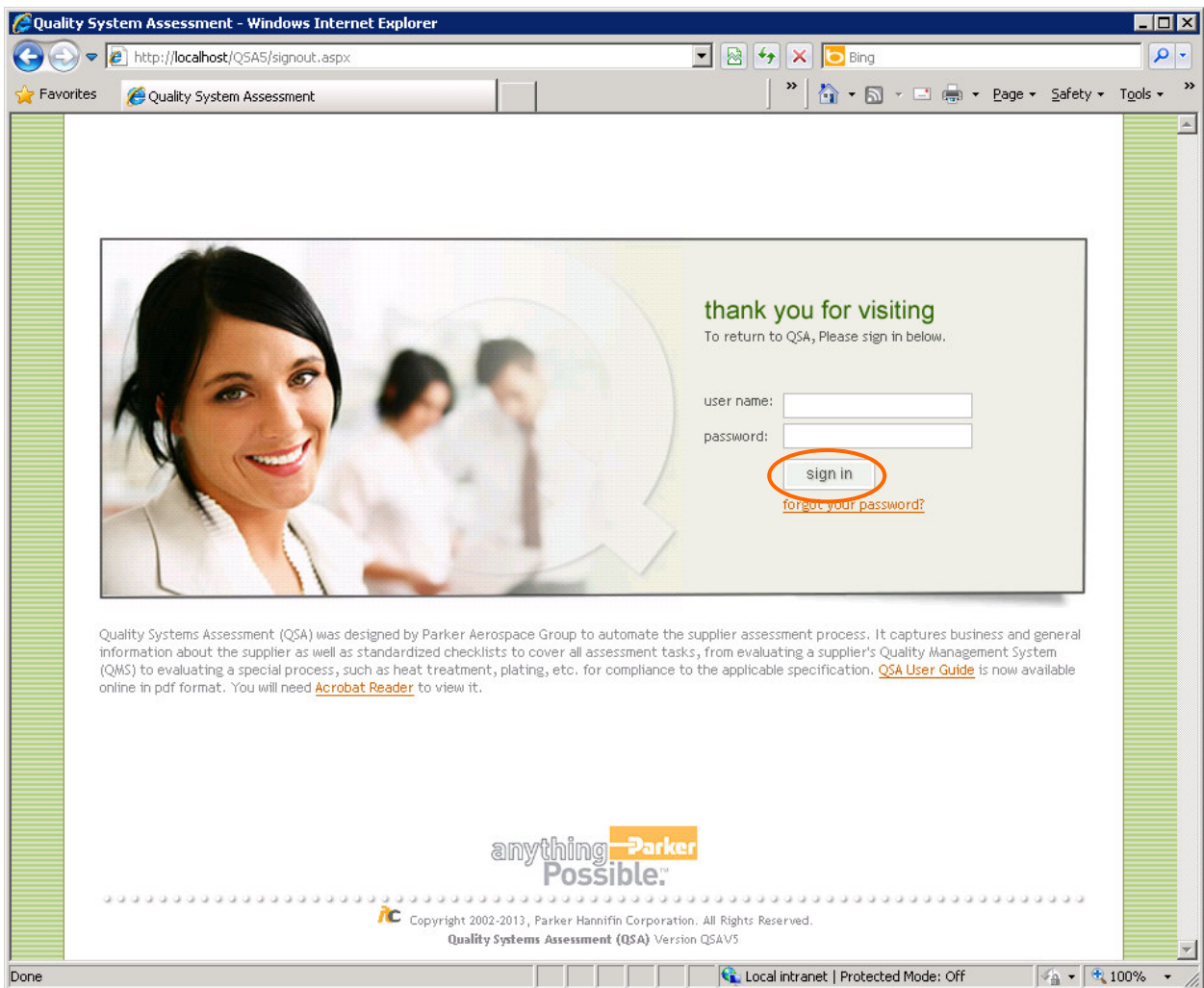
# Chapter 1 – Application Overview

## QSA Online Login

To access QSA online, your computer must be connected to the internet:

- Open your Internet Explorer browser.
- On the address line of your browser, type **https://aagqsa** and press enter. You should see a login web page similar to below.
- Enter you user ID and password, then click the “sign in” button.

Figure 2 – Sign in



**Forget your password?** If you’ve forgotten your password or user ID, simply click on the link labeled “forgot your password?”. You will be prompted to enter your email address. The system will automatically send you your user ID and password via email.

**How can you obtain a login account?** In order to sign in to QSA, you will need a QSA login account. Please contact your divisional QSA administrators to obtain an account.

# Chapter 1 – Application Overview

## Tab Navigation

The main menu is a tabbed navigation bar that provides you quick access to the supplier and survey data, as well as administrative resources. Specific tabs are made available to certain users, depending on the user type. QSA has five types of users: supplier, generic, procurement quality team leader, surveyor, and administrator. For additional on user types and permissions, please refer to Appendix A.



Figure 3 – Tab Navigation

Following is a brief description of each of the menu tabs:

**My Surveys** tab is available to all users. For surveyors, procurement quality team leader, and administrators, it provides a convenient list of open surveys, schedules, and requests where the user is the lead or assigned assessor. Here, the user will be able to edit, delete, print, download, and upload any one of the listed survey. For suppliers, it lists outstanding surveys pertaining to the supplier's company.

**My Profile** tab is also available to all users. You will be able to update and maintain your user account information here.

**Suppliers** tab is available to all users with the exception of vendors. It offers a user-friendly interface to help search, create, and manage supplier surveys. More detailed instructions on how to use the Suppliers section to search, create, and manage supplier information is available in Chapter 2 of this manual.

Users can search for suppliers by:

- Supplier name
- Vendor number
- City, State, Country
- Last survey date, Surveyor

Once a search is complete and shows a list of checklist templates, the templates can be sorted by:

- Supplier name
- Vendor number
- City, State, Country
- Last Surveyor, Last Survey Date
- Next Scheduled Date, Scheduled By

**Forms** tab is available to all users with the exception of vendors. It contains an inventory of all blank checklist revisions in the database. Administrators will be able to edit and add new checklist forms or revisions. Generic users and surveyors will be able to view and print blank checklist forms whenever hard copies are necessary.

# Chapter 1 – Application Overview

## Tab Navigation (continued)

Users can search for checklist templates by:

- Category
- Spec. number, Spec. revision code
- Form number, Form revision code
- Form title

Once a search is complete and shows a list of checklist templates, the templates can be sorted by:

- Category
- Spec.
- Form
- Title
- Released by (person who completed the update)
- Date last update was completed or released

**Users** tab is only available to administrators. It allows administrators to manage QSA user accounts. In this section, administrators can search the names of users by clicking on any letter of the alphabet.

User information can be sorted by:

- User ID
- Name
- Company
- User type (A-administrator, I-inactive user, S-surveyor, V-vendor, G-generic user, P-procurement quality team leader, PA-Procurement quality team leader & administrator)

A user's information may not be deleted, only made an invalid user. Administrators may also add users to the database by clicking on the Add User button and filling in appropriate information.

**Attachments** tab is available to administrators to manage uploaded documents associated with corrective action requests. On this web page, administrators can search the names of suppliers by clicking on any letter of the alphabet.

Reference library information can be sorted by:

- Title
- File
- Date corrective action information was posted
- By person posting information
- Supplier name
- CAR
- Date CAR was posted

**Sign Out** tab is available to all users. One click will quickly log users off of QSA from any screen.



# Chapter 1 – Application Overview

## Breadcrumb Navigation

The term “breadcrumb” derives its name from the Grimm’s fairy tale, Hansel and Gretel. Hansel left a trail of breadcrumbs through the woods as a strategy to find his way back home. As you work within a particular tab and click down through the pages, the breadcrumb navigation lets you know exactly where you started, how many levels down you have gone, and where you currently are in the website.

Instead of having to click on the Back button repeatedly to retrace your steps, this breadcrumb navigation allows you to click directly on any of the “crumbs” to get back to a desired screen.

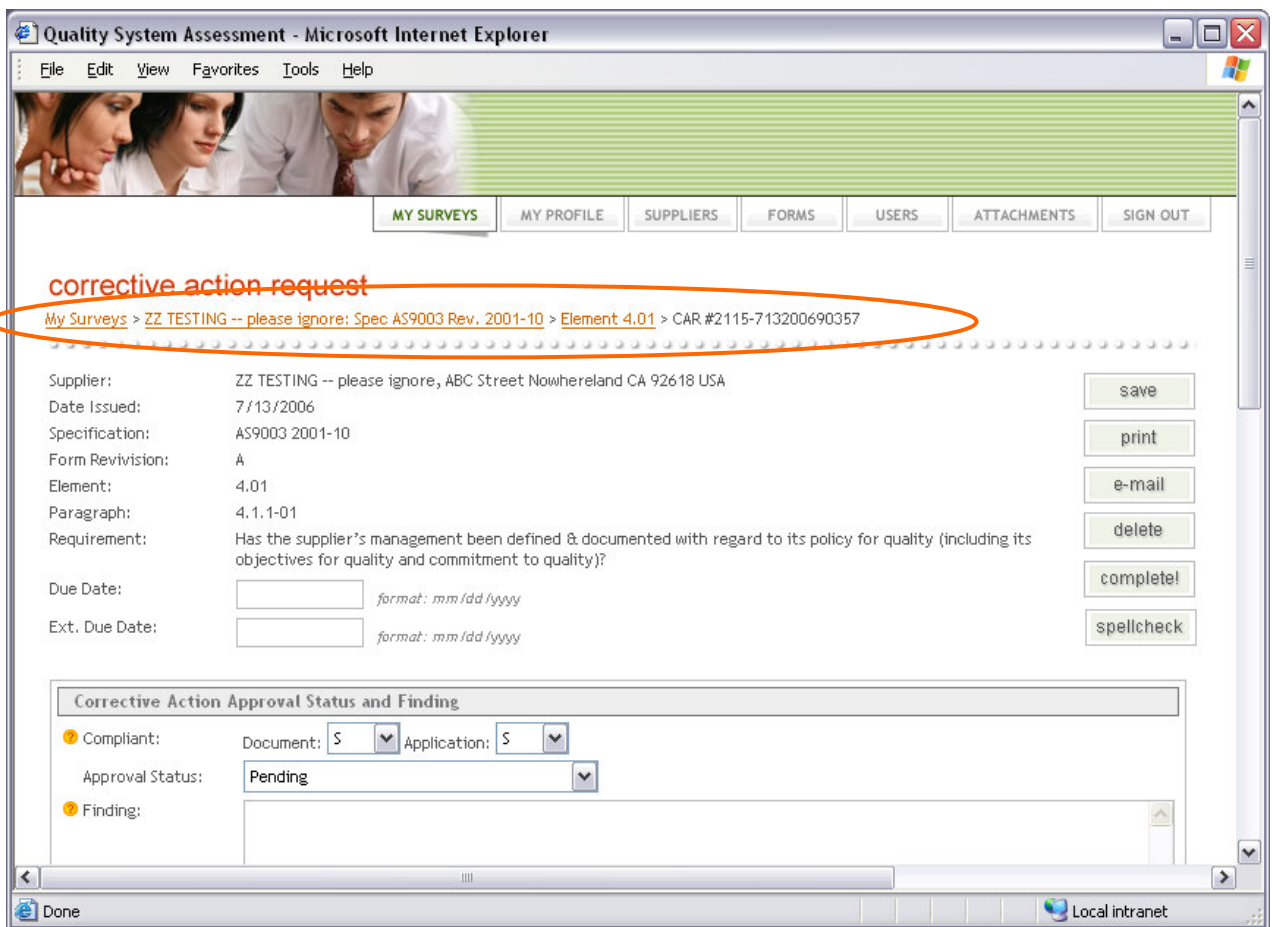















Figure 4 – Breadcrumb Navigation

# Chapter 1 – Application Overview

## Application Icons

Throughout QSA, there are a variety of buttons & icons. Refer to the table below for detail descriptions of each.

Icon	Description
	<b>Audit Request Icon:</b> This icon represents an audit request submitted by a procurement quality team leader.
	<b>Audit Schedule Icon:</b> This icon represents an audit schedule created by a surveyor, procurement quality team leader, or administrator.
	<b>Delete Button:</b> Click on this button if you would like to delete a particular record (i.e. survey, supplier, etc... ). This feature is valid for lead surveyors or administrators only. Users who do not have the security rights to delete certain documents or records will not see this button.
	<b>Details Button:</b> Click on this button to view the detail information pertaining to an element of a survey form. This function is only valid for administrators.
	<b>Download Button:</b> Click on this button to download a particular survey. This function is valid for lead or assigned surveyors only. Users who do not have the security rights to download will not see the button.
	<b>Edit Button:</b> Click on this button to edit a corrective action request comment.
	<b>E-mail Button:</b> Click on this button to e-mail a blank survey form to the supplier.
	<b>Help Button:</b> Click on this button to view detail description of a particular subject. This feature is available to all users.
	<b>Lock Icon:</b> This icon indicates that a particular survey is locked. When you hover your mouse over the lock icon, you will see the date the survey was locked and the current owner. This feature is available to all users.
	<b>Membership Icon:</b> This icon indicates that a particular user is a member of the Parker Aerospace Quality Committee. This feature is only available to administrators.
	<b>Print Button:</b> Click on this button and then press the keys <i>Ctrl</i> and <i>P</i> simultaneously to print. This feature is available to all users.
	<b>Reassign Button:</b> Click on this button to reassign a survey to another lead surveyor. This function is only valid for administrators. Users who do not an administrator will not see the button.
	<b>Released Icon:</b> This icon indicates that a checklist has been released by the administrator to be used by all surveyors.

# Chapter 1 – Application Overview

## Application Icons (continued)




Icon	Description
	<b>Survey Icon:</b> This icon represents a survey.
	<b>Unlock Button:</b> Click on this button to unlock a survey. This function is only valid for the assessor who downloaded that particular survey. Users who do not have the appropriate security rights to unlock will not see the button.
	<b>Upload Button:</b> Click on this button to upload a survey. This function is only valid for the surveyor who downloaded that particular survey. Users who do not have the appropriate security rights to upload will not see the button.

Figure 5 – QSA Buttons & Icons

# Chapter 2 – Manage Suppliers

## Search Suppliers

Users can search for suppliers by specifying the supplier name, vendor number, city, state, country, last survey date (or next scheduled survey date), and/or the lead auditor's name. The search is not case sensitive. Partial word search is supported. For example, "aero" will yield "Aero Spring & MFG", "Aerospace Testing", and "Advanced Aircraft".

To search, click on the Suppliers tab. Enter information for one (or any combination) of the listed fields and then click on the "search" button.

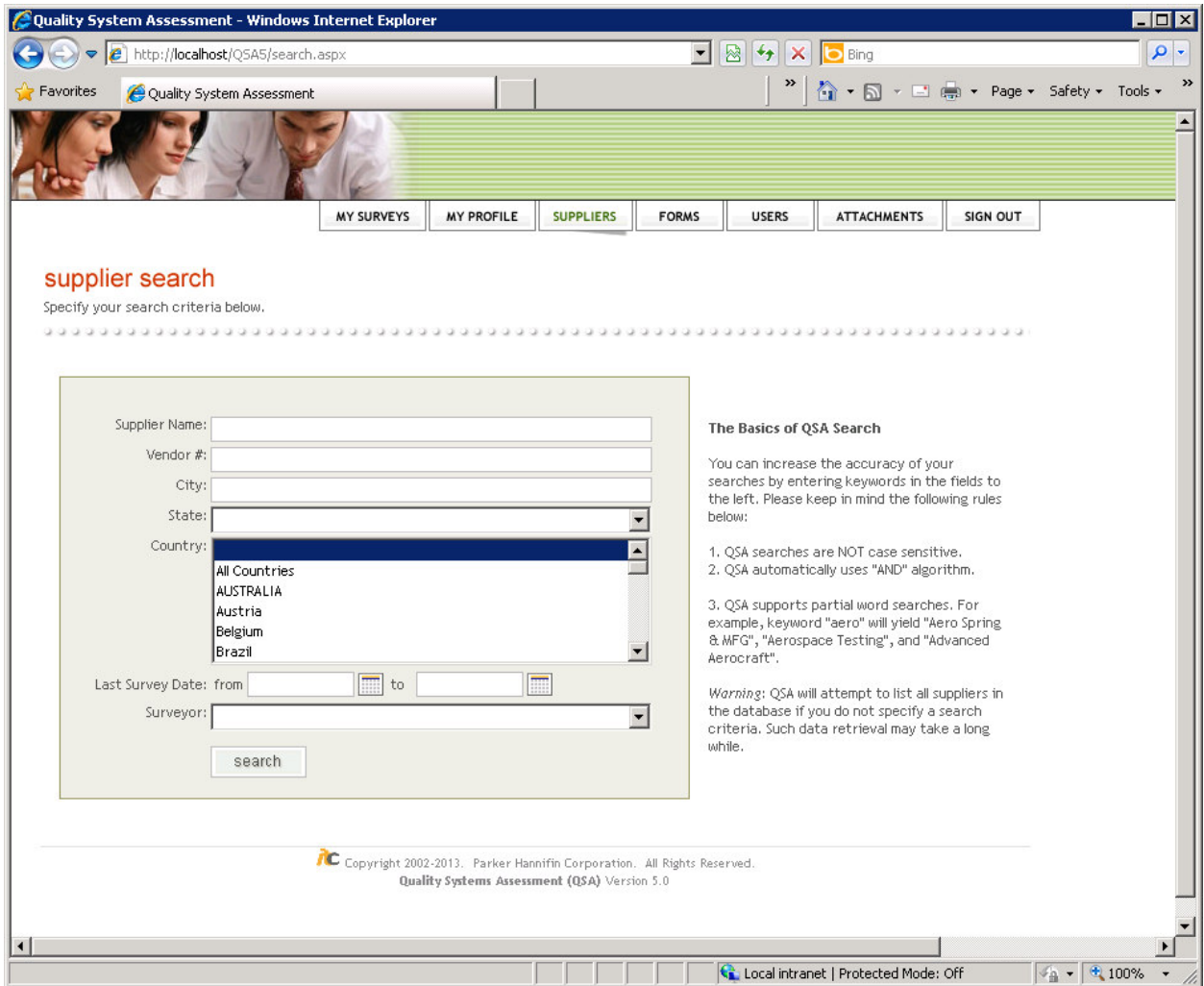


Figure 6 – Supplier Search

# Chapter 2 – Manage Suppliers

## Add New Supplier

If a specific supplier does not exist in QSA, you can add a new one to the database simply by following the steps below:

1. Click on the Suppliers tab.
2. Click on the “add new supplier” button (figure #7), a popup form will appear on the screen (figure #8)
3. Enter the name and address of the desired supplier in the textboxes provided and click on the “add” button to submit your entries.

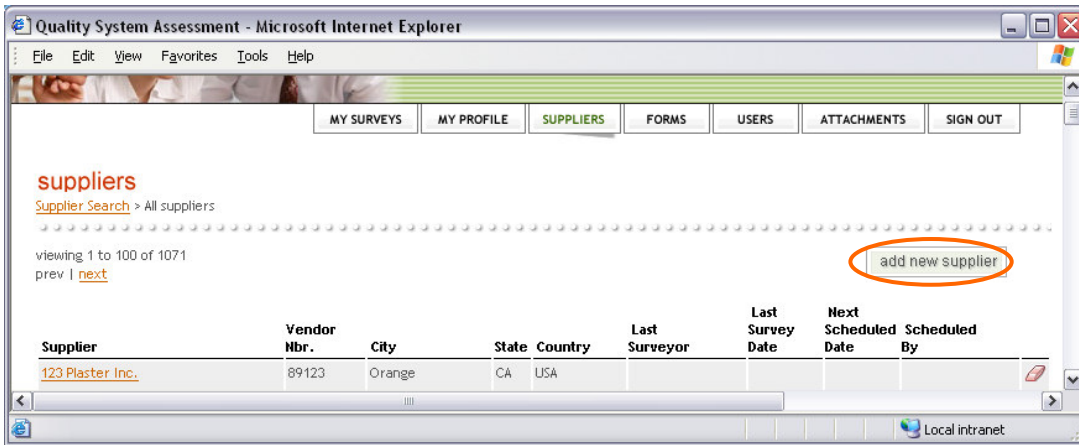


Figure 7 – Add New Supplier Button

The screenshot shows a popup form titled "add new supplier" with the instruction "Enter the supplier you would like to add below." Below this, a note states "All required entries are marked with asterisks (\*)." The form contains the following fields: "Supplier: \*" (text input), "Vendor ID:" (text input), "Address Line 1: \*" (text input), "Address Line 2: \*" (text input), "City: \*" (text input), "State:" (dropdown menu), "Zip:" (text input), "Province:" (text input), and "Country: \*" (text input with "USA" selected). At the bottom of the form are two buttons: "add" and "cancel".

Figure 8 – Add New Supplier

# Chapter 2 – Manage Suppliers

## Edit Supplier Information

All surveyors, procurement quality team leaders, and administrators can edit the supplier information. The steps are listed below.

- Click on the Suppliers tab.
- On the “supplier search” page, type the name of the supplier whose information you want to edit, then click the “search” button.
- On the suppliers search result page, click on the desired supplier name to open the supplier cover page.
- Click on the link with the supplier’s name. A popup form will appear on your screen titled “supplier information” (figure #9).
- Edit the information as necessary.
- Once you are done with the updates, click on the “save” button.

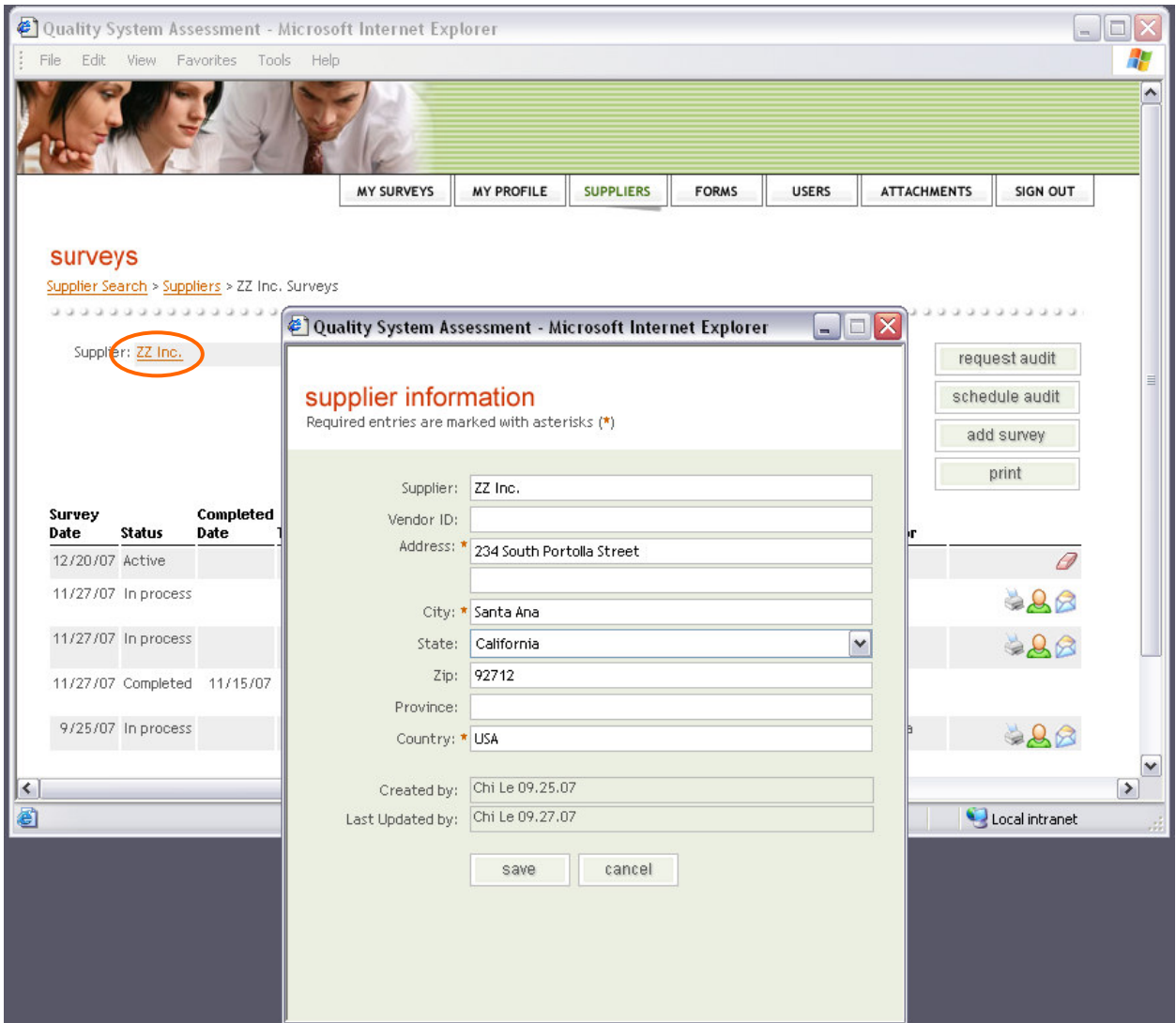


Figure 9 – Edit Supplier Information

# Chapter 2 – Manage Suppliers

## Print Supplier Surveys

To print a paper copy of a supplier cover page, first, click on the Suppliers tab and then do the following:

- Type in the name of the desired supplier, then click on the “search” button.
- At the “suppliers” page, click on the supplier’s name to open the “surveys” page (figure #10).
- Click on the print button to load the print preview page.
- From print preview page, press Ctrl+P keys simultaneously. Click on the “OK” button.

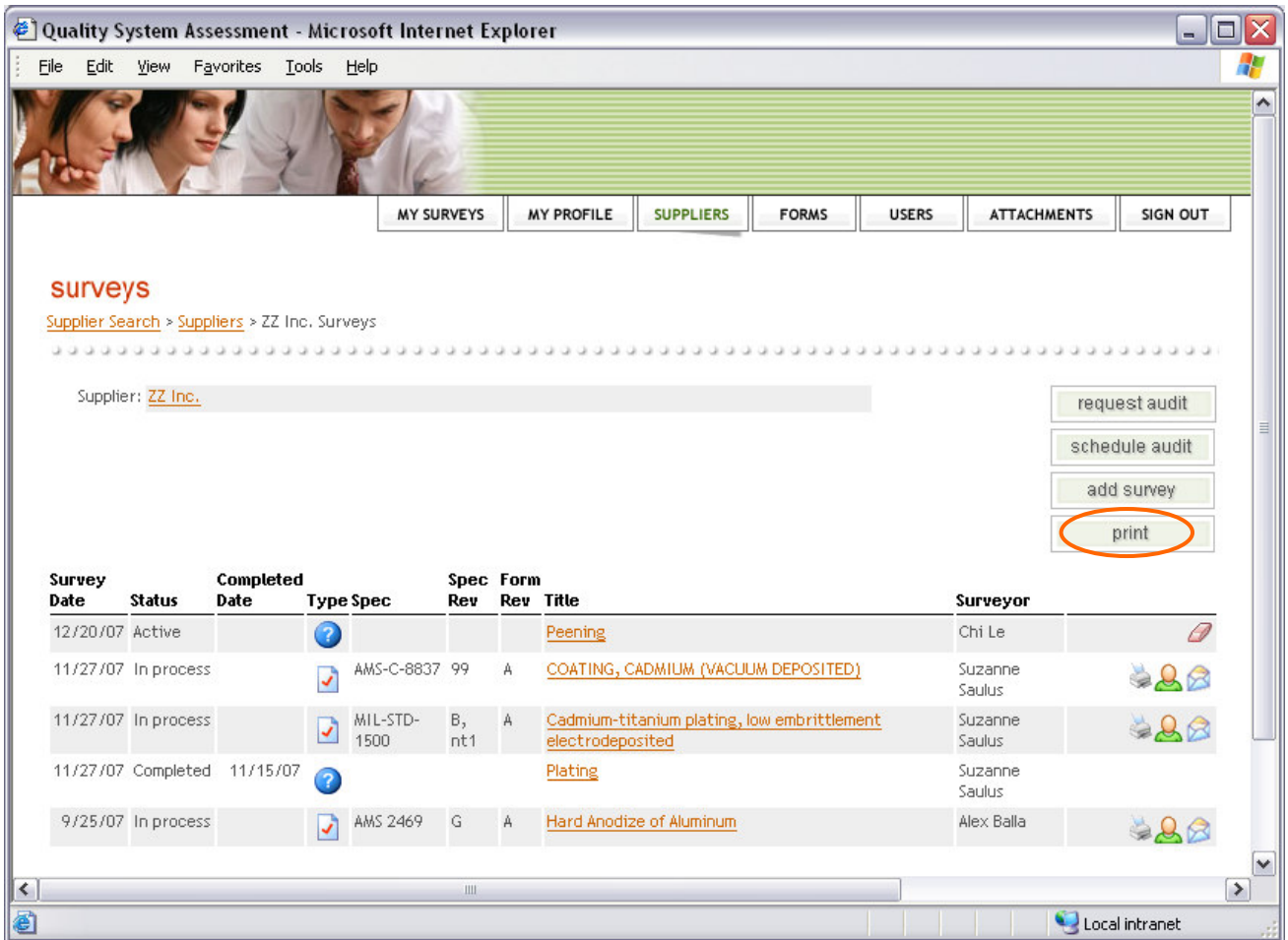



Figure 10 – Print Supplier Cover Page

# Chapter 2 – Manage Suppliers

## Delete Supplier

A supplier can only be deleted by the administrator or the surveyor who created the record. To delete one, do the following steps:

- Click on the Suppliers tab, to get to the “supplier search” page.
- Type in the name of the desired supplier, then click on the “search” button.
- At the “suppliers” search result page, locate the desired supplier of your choice.
- Click on the Delete  button (located on the right side of the screen).
- You will be asked to confirm. Click the “OK” button to proceed with the deletion or the “Cancel” button to cancel the process entirely.

**Note:** In order to delete a supplier, all surveys, survey schedules, and audit requests of that supplier must be deleted first.



Figure 11 – Delete Supplier



# Chapter 3 – Manage Surveys

## Add Survey

Only surveyors, procurement quality team leaders, and administrators can add “quality systems” surveys. Furthermore, only certified process surveyors can add “process” surveys. If you are a certified process surveyor and you can’t add process surveys, please contact the QSA administrators.

To add a survey for a supplier, do the following:

- Click on the Suppliers tab.
- Type in the name of the desired supplier, then click on the “search” button.
- At the “suppliers” search result page, click on the supplier of your choice.
- At the “surveys” page, click on the “add survey” button (figure 12).
- At the “add new survey” form, choose the appropriate category and survey (figure 12).
- Click on the “add” button.

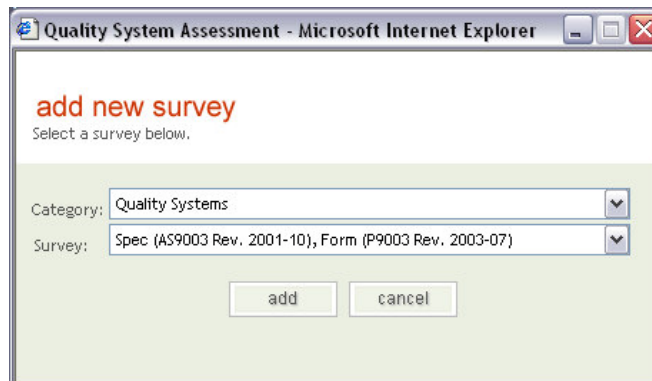
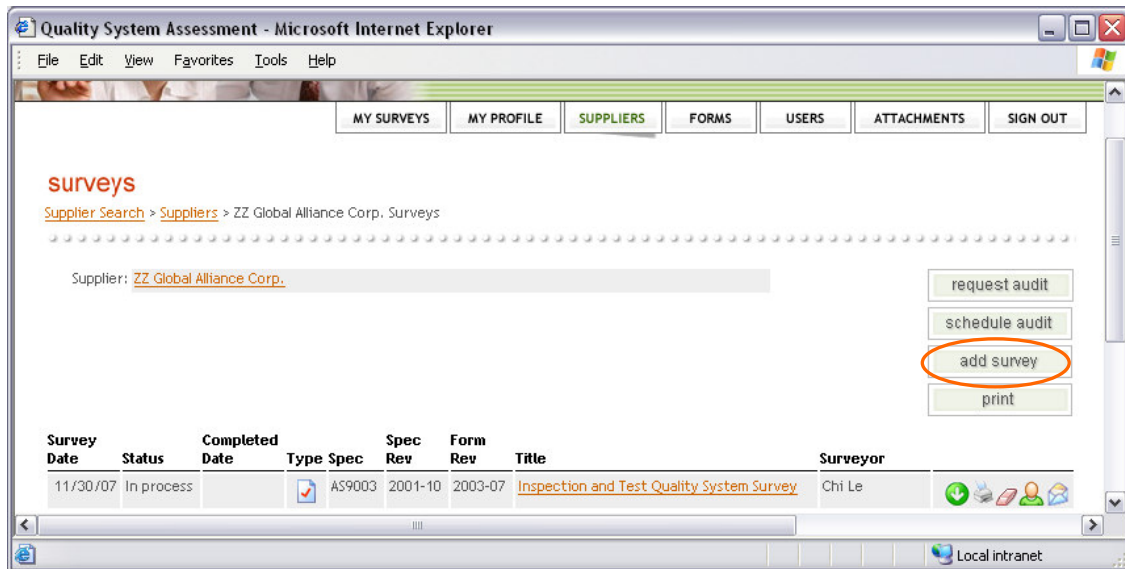


Figure 12 – Add Survey To Supplier

**Note:** The default answers to all questions will automatically be “S – satisfactory” or “Y – yes”. If you would like to change all the answers of a particular element to “N/E – not evaluated”, simply update the element status to “Not evaluated” and click on the checkbox marked “Auto populate all ‘doc’ and ‘use’ fields to ‘N/E – not evaluated’”. These features are new in version 2.0, designed to ease the data entry process.

# Chapter 3 – Manage Surveys

## Assign Element

The person who created the survey is automatically the lead surveyor. As the lead surveyor, you may delegate sections of the survey, called elements, to other members in your team. To assign elements, do the following:

- Click on My Surveys tab.
- At the “my surveys” page, locate the desired survey and then click on the survey title. (Clicking on the survey title will open the audit checklist form and show all elements of the survey.)
- At the “audit checklist” page, find the element you want to assign to another person.
- Next to the element, under the “Surveyor” column, choose the person to whom you would like to assign the element.
- Once done entering all appropriate information on the “audit checklist” page, click the “save” button.

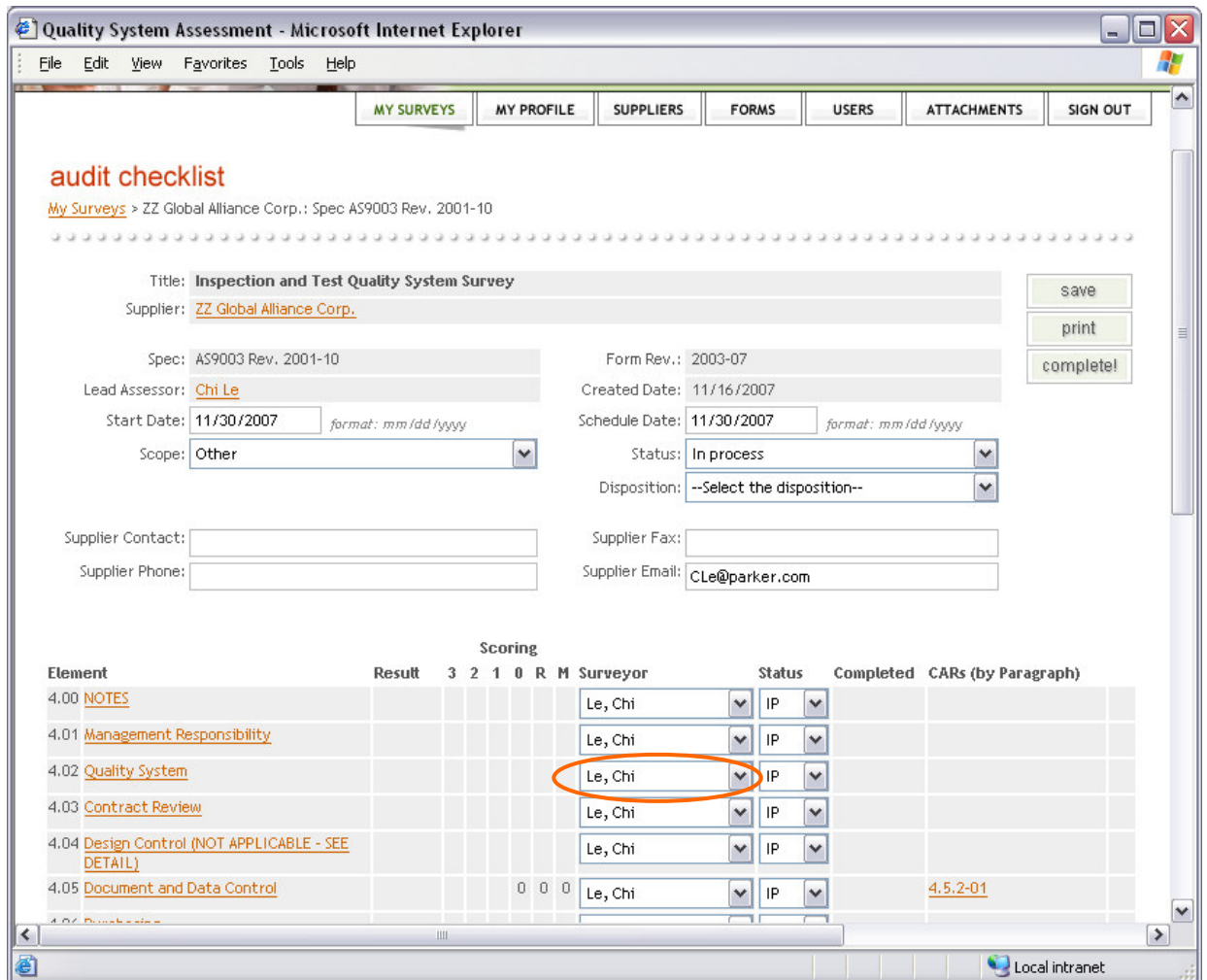



Figure 13 – Assign Element

# Chapter 3 – Manage Surveys

## Print Survey

You can print paper copies of a survey. To print a survey, do the following:

- Click on the Suppliers tab to get to the “supplier search” page.
- To search for a particular supplier, type the name of the supplier in the “Supplier Name” textbox and click on the “search” button.
- At the “suppliers” search result page, select the supplier of your choice.
- On the “surveys” page (shown below), Click on the Print  button that corresponds to the survey you would like to print. A print preview page will be loaded on the screen.
- At print preview page, press Ctrl+P keys simultaneously. Click on the “OK” button.

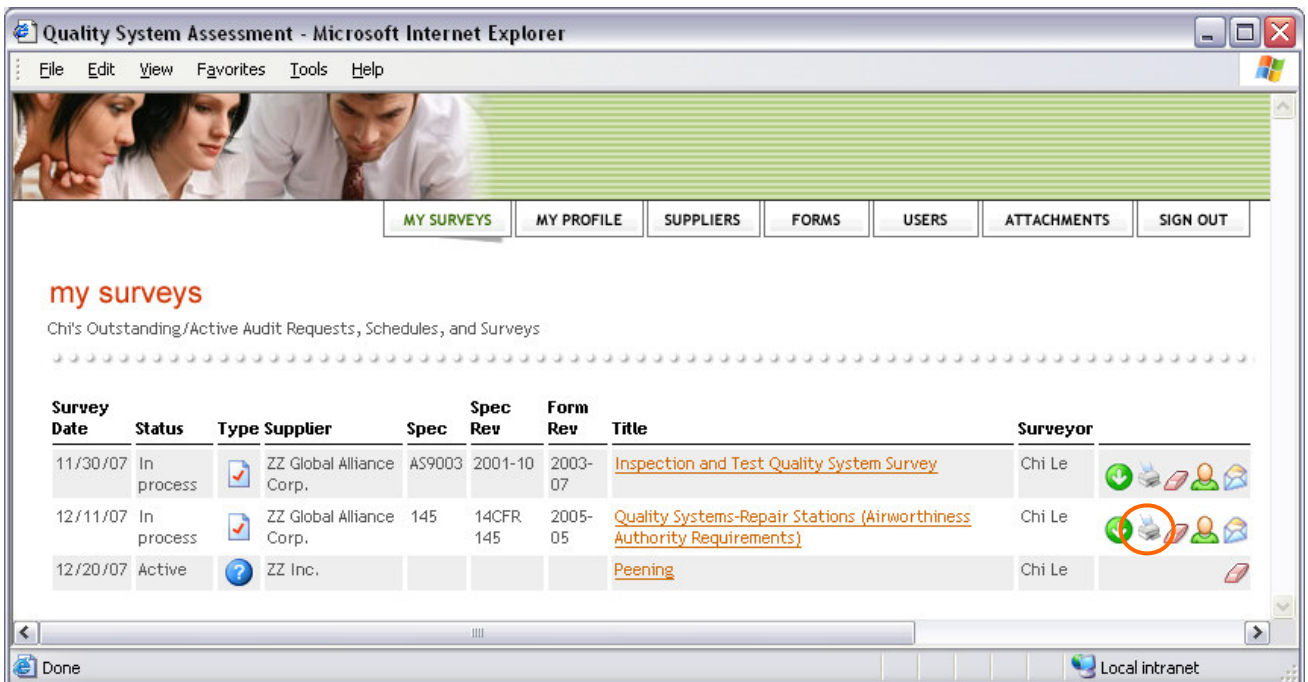


Figure 14 – Print Survey

# Chapter 3 – Manage Surveys

## Print Element

You can print paper copies of a survey element. To print a survey element, do the following:

- Click on the Suppliers tab to get to the “supplier search” page.
- To search for a particular supplier, type the name of the supplier in the “Supplier Name” textbox and click the “search” button.
- At the “suppliers” search result page, select the supplier of your choice.
- At the “surveys” page, click on the survey of your choice.
- At the “audit checklist” page, click on the element you would like to print.
- At the “questionnaire” page (shown below), click on the print button. This will load the print preview page.
- From print preview page, press Ctrl+P keys simultaneously. Click on the “OK” button.

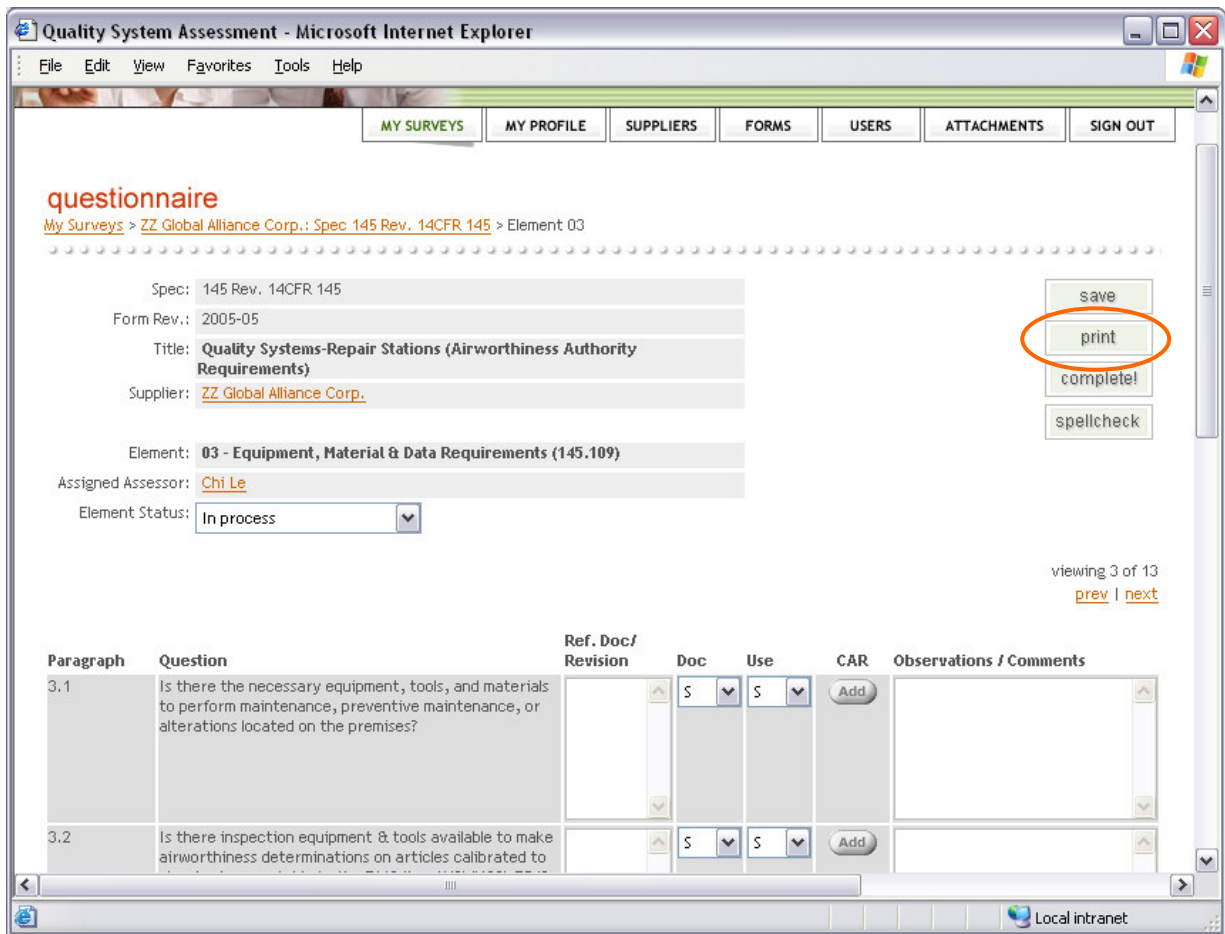



Figure 15 – Print Element

# Chapter 3 – Manage Surveys

## Print Blank Survey Checklist

You can print a blank survey checklist by performing the steps below:

- Click on the Forms tab.
- Fill out the “checklist template search” box, and click on the “search” button to find the desired checklist form.
- At the “checklist templates” search result page, click on the Print  button that corresponds to the checklist you would like to print.
- At print preview page, press Ctrl+P keys simultaneously. Click on the “OK” button.

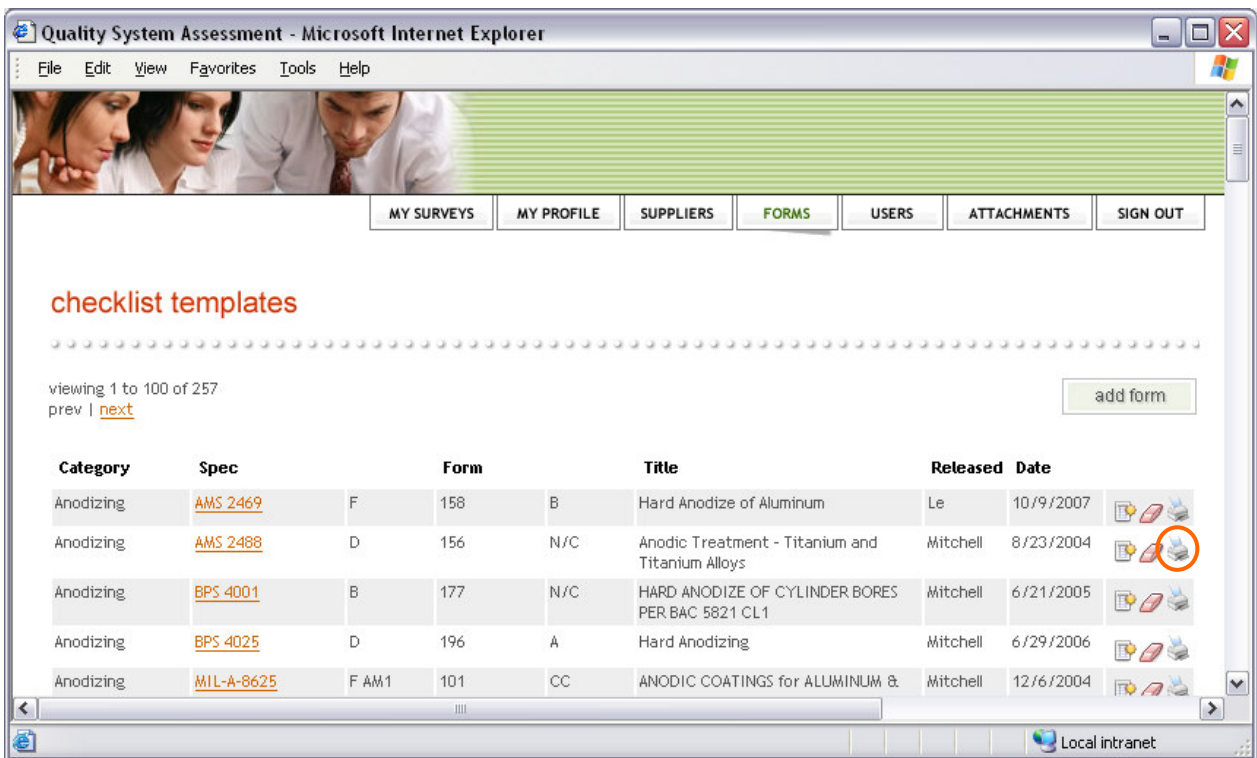


Figure 16 – Print Blank Checklist

# Chapter 3 – Manage Surveys

## Email Blank Survey Checklist

You can send the supplier an email with a link to a blank checklist so they can prepare for your audit visit. The supplier is encouraged to print the checklist and fill it out themselves. To email a blank survey checklist, simply do the following:

- Click on the Suppliers tab.
- To search for a particular supplier, type the name of the supplier in the "Supplier Name" textbox and click on the "search" button.
- At the "suppliers" search result page, click on the supplier name to open the supplier record.
- On the "surveys" page, click on the email button that corresponds to the survey you would like to be emailed. A popup form will appear on the screen, as illustrated below.
- Fill out the recipient name and email address.
- Click on the "send" button.

**Note:** Once the e-mail is sent, the system will automatically log it in the survey comments field.

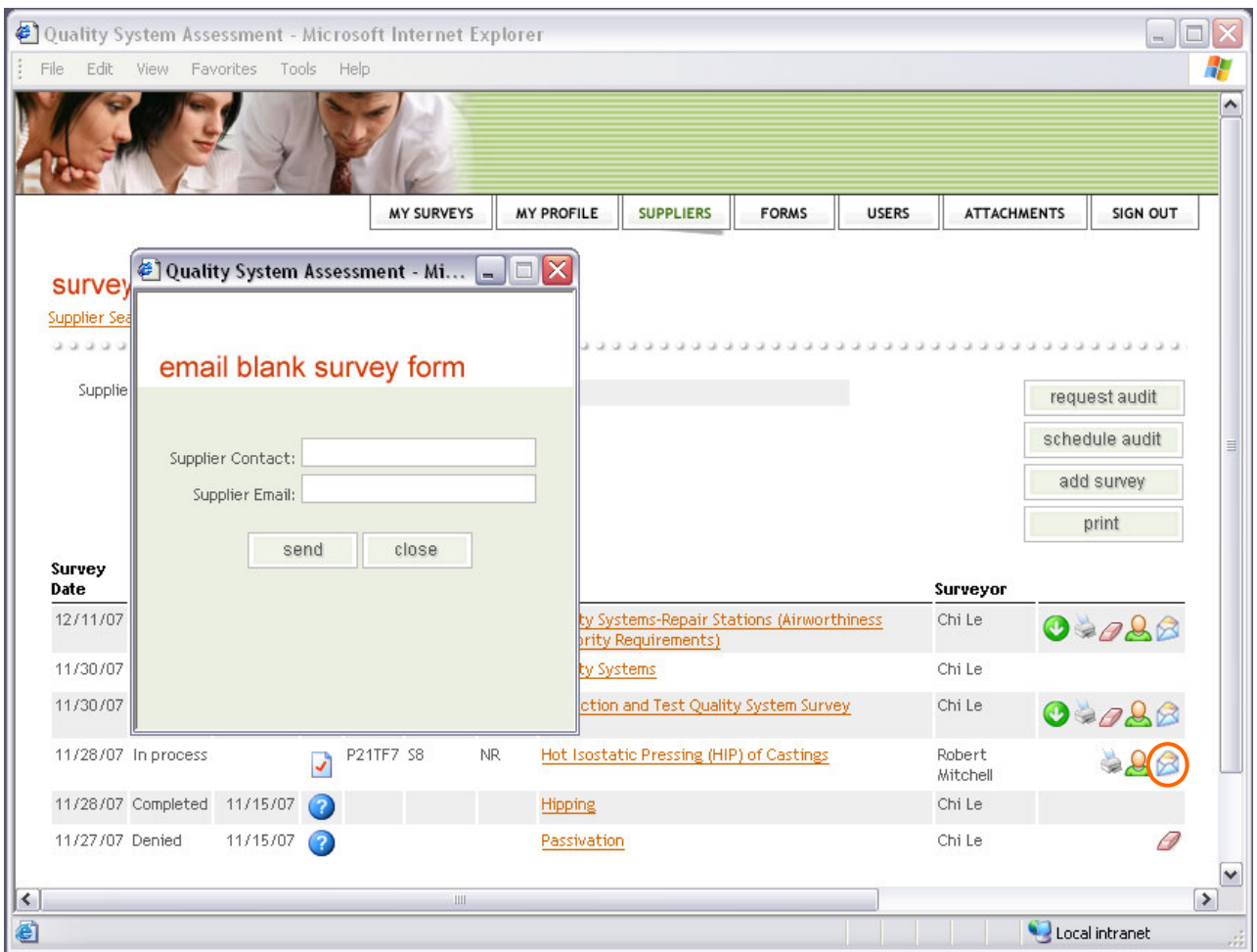



Figure 17 – Email Blank Checklist

# Chapter 3 – Manage Surveys


## Download Survey

As a lead or assigned auditor of a survey, you can download it to your computer. This will allow you to work on the survey when you do not have access to the internet. Once you've downloaded the survey successfully, a lock icon  will appear next to it. You now have exclusive access to the survey data. No one else will be able to edit or view the survey until you upload it back to the shared database, thus, releasing the lock. For more information, please refer to section "Unlock Survey/Element" of this user guide. To download a survey, follow the steps below:

First, locate the desired survey.

- Click on My Surveys tab.
- At the "my surveys" page, locate the survey you wish to download (as shown in figure 18).

Then, perform the download

- Click on the associated download button  of the desired survey.
- At the "survey download" page (as shown in figure 19), click on the "download" button. You will see a pop-up window similar to figure 20. Click on the "save" button to save the file to you laptop. DO NOT click on the "open" button!
- At the "Save As" form (figure 21), navigate to the desired directory where you want to save the survey file and click on the "Save" button. Remember the name and location of the downloaded survey file. You will need to locate it later.
- After the file has been saved, click on the "Close" button (as shown in figure 22).
- On the Download Survey page, click on the "back" button.

**Note:** You will need QSA Editor to view and update the downloaded elements. For more information on QSA Editor (including installation instructions), please refer to chapter "QSA Editor" of this user guide.



Figure 18 – Download Survey Button

# Chapter 3 – Manage Surveys

## Download Survey (continued)

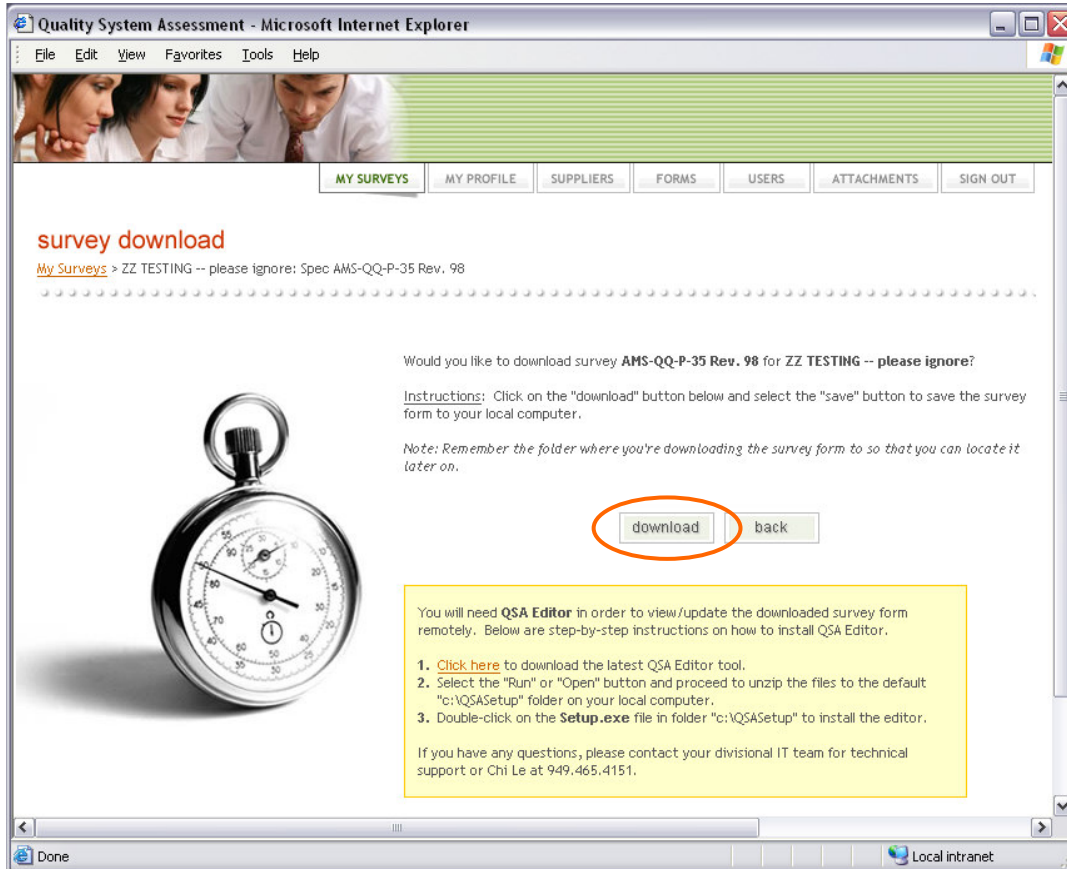


Figure 19 – Download Survey

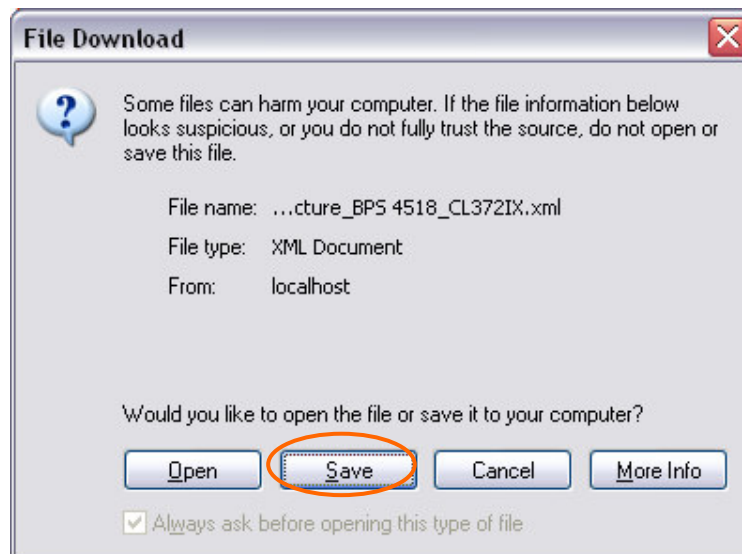


Figure 20 – Save Survey To Laptop



# Chapter 3 – Manage Surveys

## Download Survey (continued)

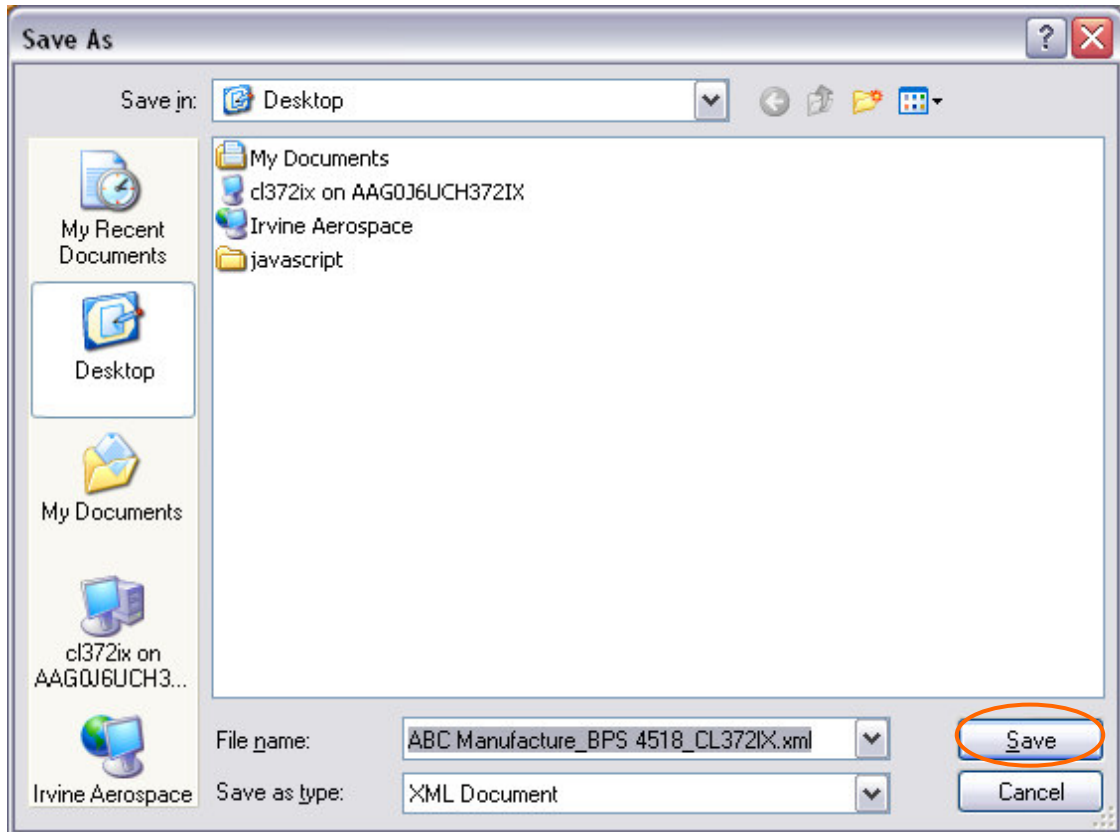


Figure 21 – Save Survey Form As...

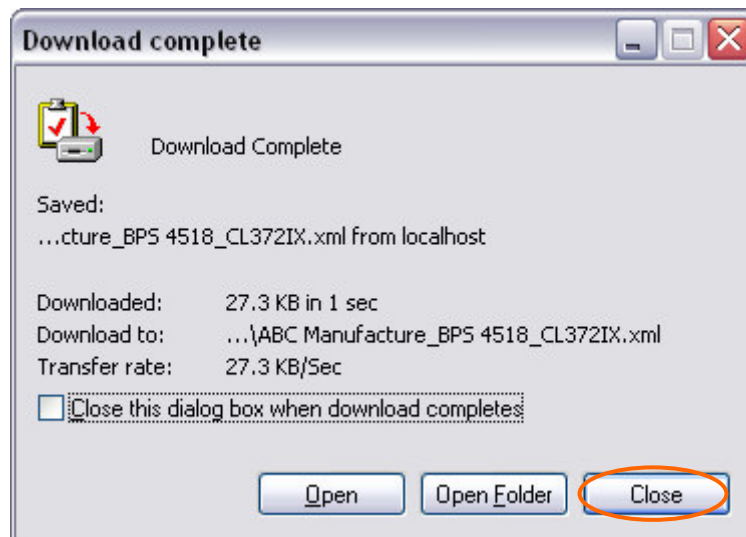


Figure 22 – Download Complete

# Chapter 3 – Manage Surveys

## Upload Survey

Uploading a survey back to the QSA shared database will release the lock and allow you to share the audit with everyone again. To upload, follow the steps below:

First, locate the survey.

- Login to QSA website (not QSA Editor!).
- Click on My Surveys tab.
- At the “my surveys” page, locate the survey you wish to upload (as shown in figure 23).

Then, perform the upload.


- Click on the associated upload button  of the desired survey.
- On the “survey upload” page (figure 24), click on the “browse” button.
- From the “Choose File” form (figure 25), navigate to the directory where you store the survey file. Locate the file and select it. Click on the “Open” button.
- Now that you’ve specified the survey file, click on the “upload” button of the “survey upload” page.
- When the file transfer is completed, click on the “back” button.



Figure 23 – Upload Survey Button

# Chapter 3 – Manage Surveys

## Upload Survey (continued)

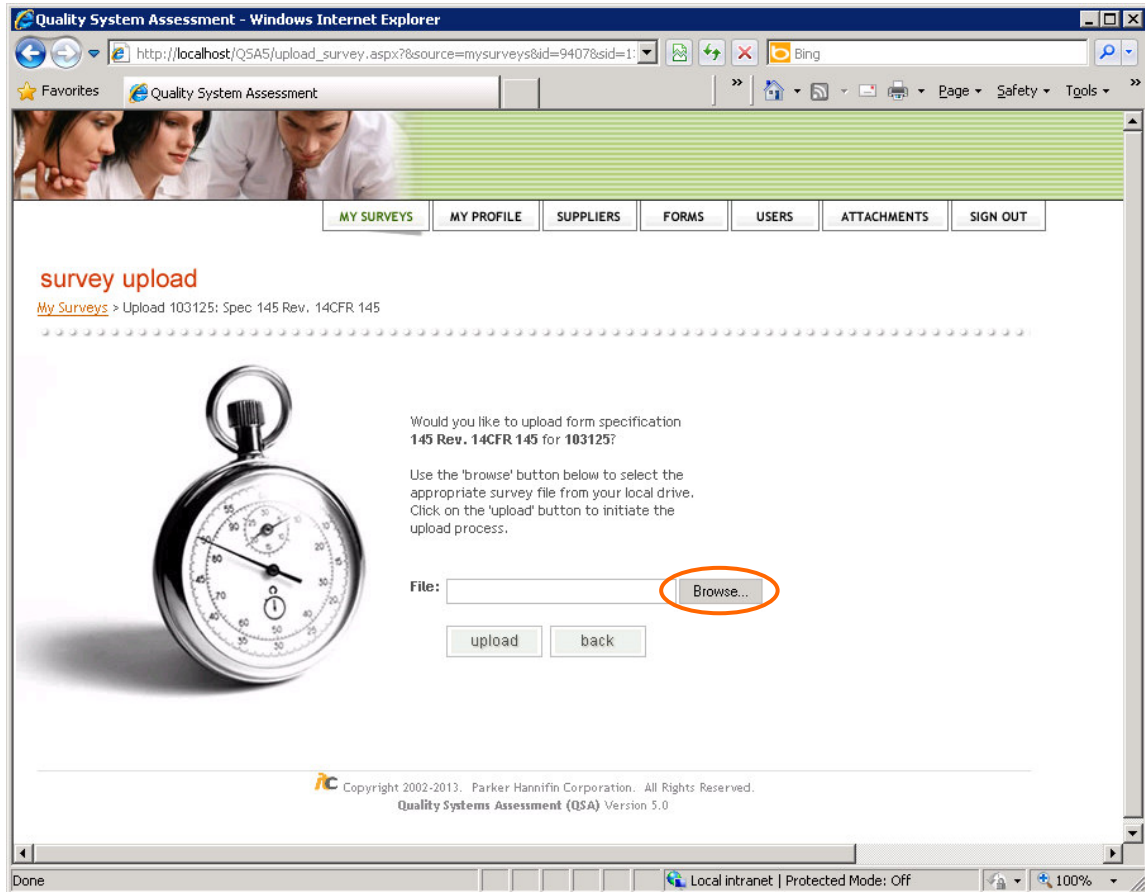


Figure 24 – Upload Survey

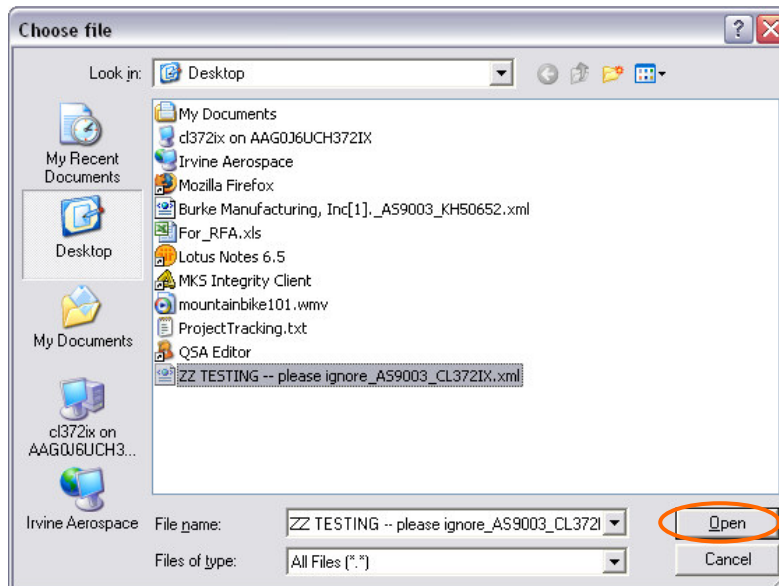



Figure 25 – Select Survey File To Be Uploaded

# Chapter 3 – Manage Surveys

## Unlock Survey

Downloaded surveys/elements are automatically locked  on the shared database. To see the download date and owner of a locked survey/element, simply hover your mouse over the “lock” icon, as shown in figure 26.

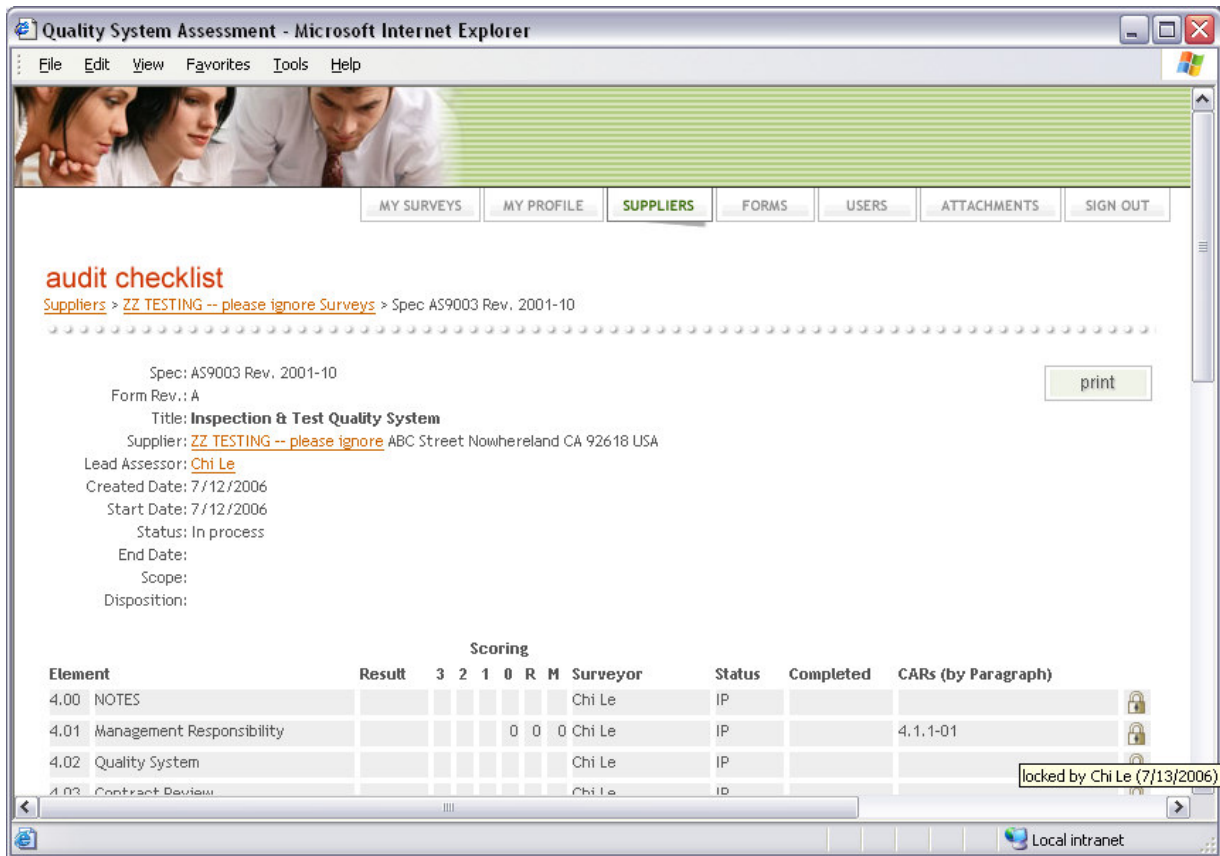



Figure 26 – Locked Elements

As the auditor of the survey, you can unlock the survey/elements without uploading the survey. You may need this feature if you’ve misplaced the downloaded survey file and are unable to upload it back to the shared database. To unlock your assigned elements, follow the steps below:

- Click on My Surveys tab.
- An the “my surveys” page, locate the survey you wish to unlock (as shown in figure 27).
- Click on the associated unlock button  of the desired survey.
- Click on the “OK” button to confirm that you would like to unlock the survey/elements

# Chapter 3 – Manage Surveys

## Unlock Survey

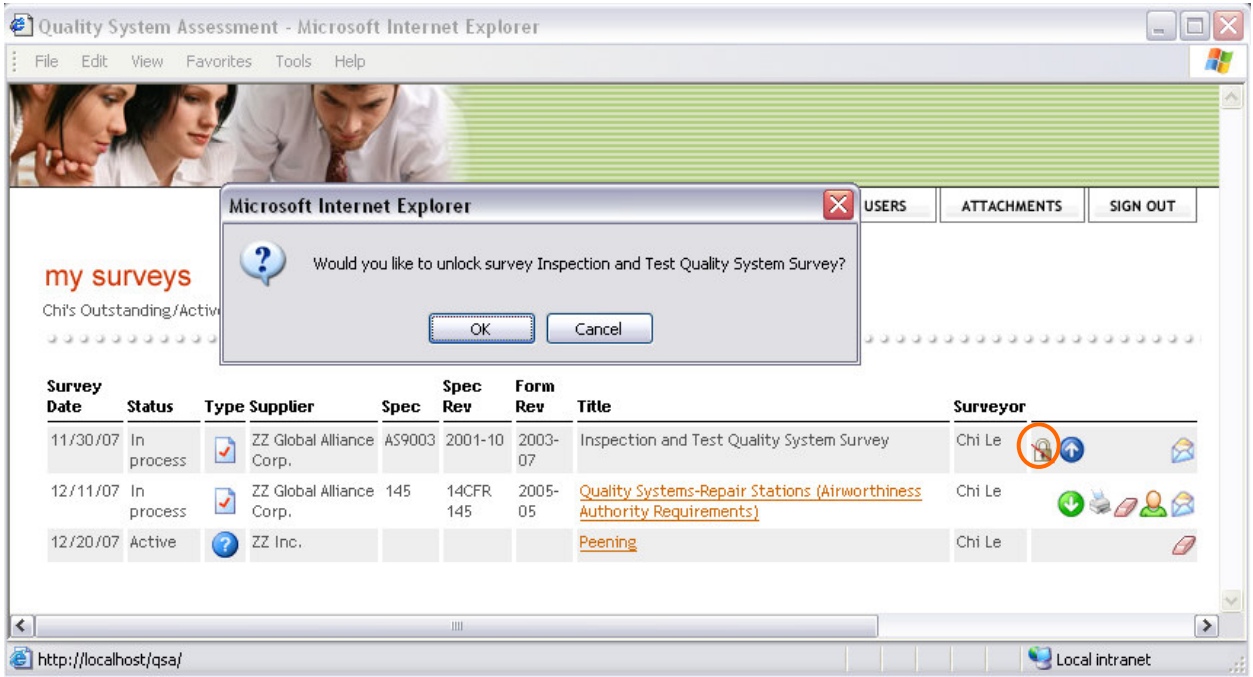


Figure 27 – Unlock Survey

# Chapter 3 – Manage Surveys

## Complete Survey

To complete or close a survey, perform the steps below:

- Click on My Surveys tab.
- Click on the survey of your choice to select it.
- From “audit checklist” form, click on element you wish to work on. This will launch the “questionnaire” form.
- Fill out the “questionnaire” form and click on the “save” button.
- When you are ready to close the element, click on the “complete!” button to close that element (as shown in figure 28).
- Repeat this process to close all elements within the survey checklist.
- Once all elements have been closed or completed, navigate (one level up) back to the Audit Checklist page using the breadcrumb navigation at the top of the web page.
- Fill out the rest of the survey information (ex. Element Status). When done, click the “complete!” button. The system will confirm that the survey is successfully completed, or it will guide you through what needs to be done before the survey can be complete.

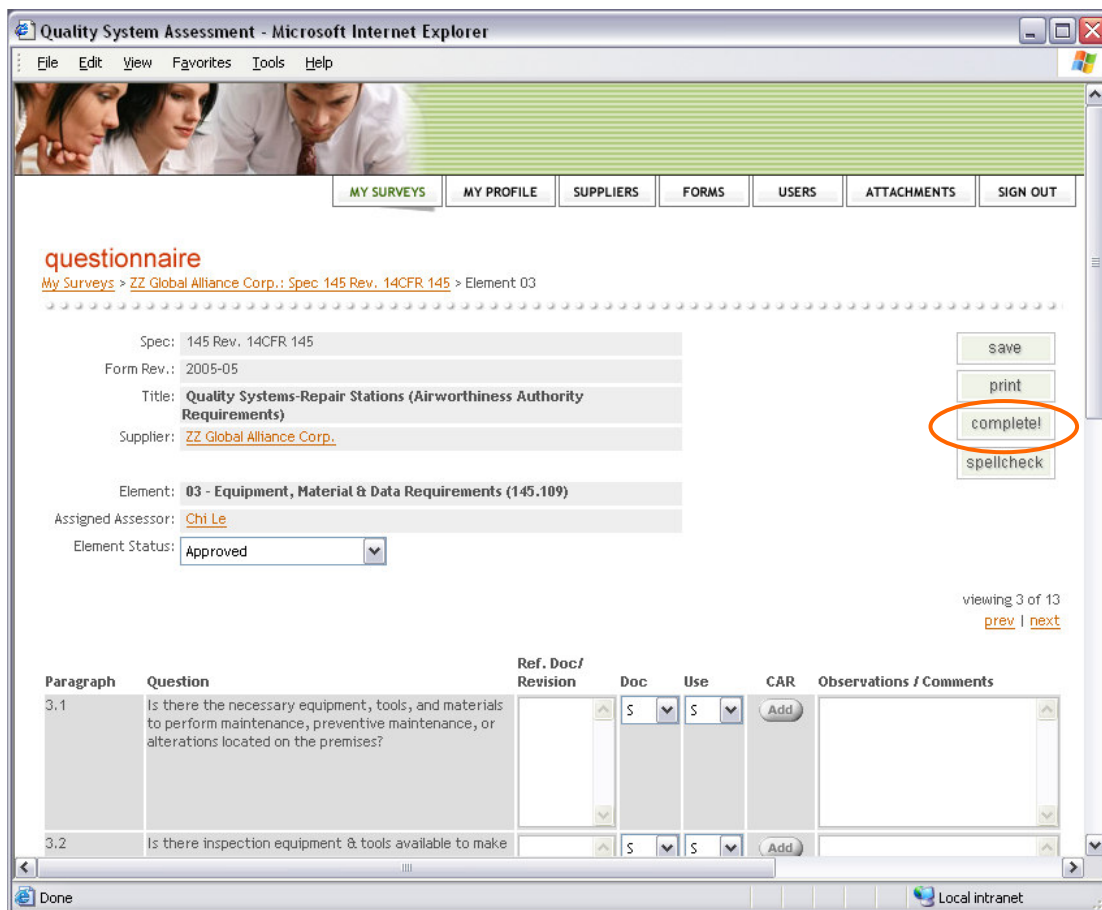


Figure 28 – Completing a Survey

**Note:** When you click on the “complete!” button on the “questionnaire” page and you’ve selected “Approved” or “Disapproved” as the element status, you must fill out the answers for columns “Doc” and “Use” (associated to Quality Systems surveys) or column “Compliant” (associated to Process surveys). All other fields are optional.

# Chapter 3 – Manage Surveys

## Email Notification for Completed Survey

You can notify the supplier of a completed survey by sending them an email. To send such an email from QSA, simply do the following:

- Click on the Suppliers tab.
- Search for the supplier by typing the name of the supplier in the "Supplier Name" textbox and click the "search" button.
- At the "suppliers" search result page, click on the desired supplier name to open the supplier record.
- At the "surveys" page, click on the desired survey.
- On the "audit checklist" page, click on the "email" button as shown below.
- On the "survey completion notification" form, enter the recipient name and e-mail address. Click on the "send" button.

**Note:** Once the e-mail is sent, the system will automatically log it within the survey comments field.

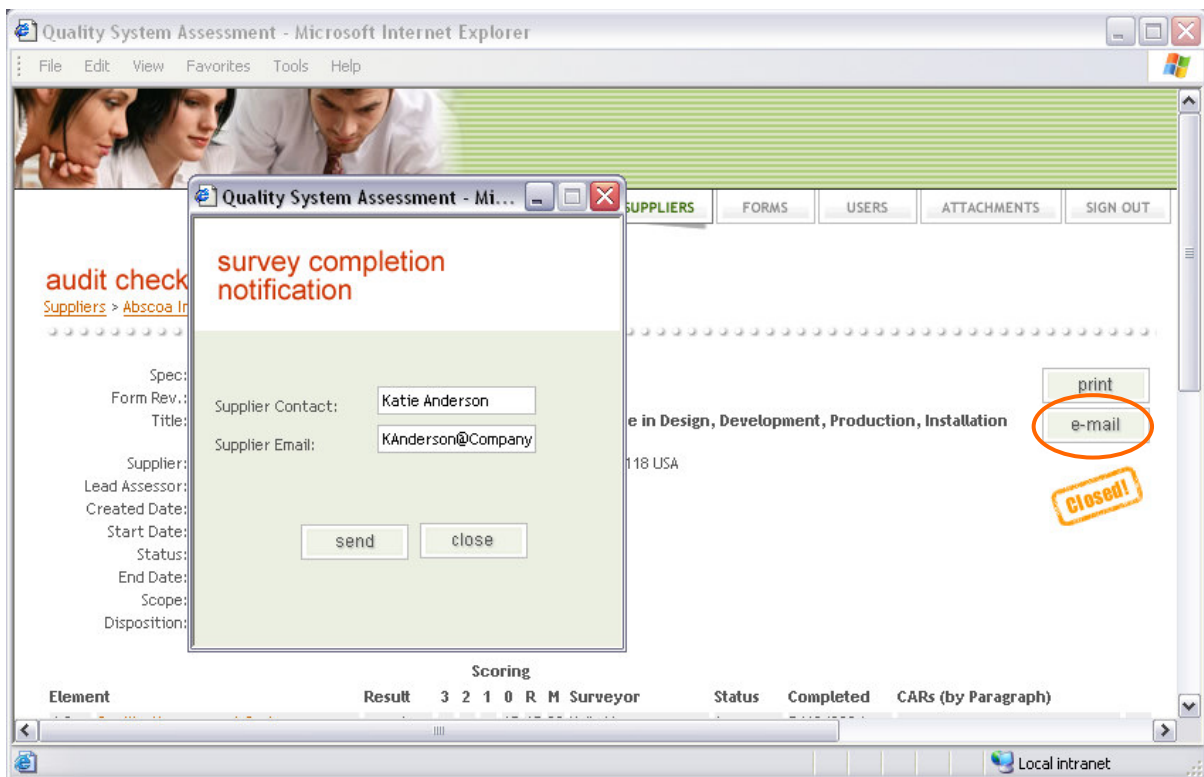



Figure 29 – Completed Survey Notification

# Chapter 3 – Manage Surveys

## Delete Survey

Only the person who created the survey (the lead assessor) or the administrator has the ability to delete an incomplete survey. Once a survey is completed, it is archived and cannot be deleted.

To delete an incomplete survey, do the following:

- Click on the My Surveys tab.
- Find the survey you want to delete and click on the Delete  button (located on the right side of the screen).

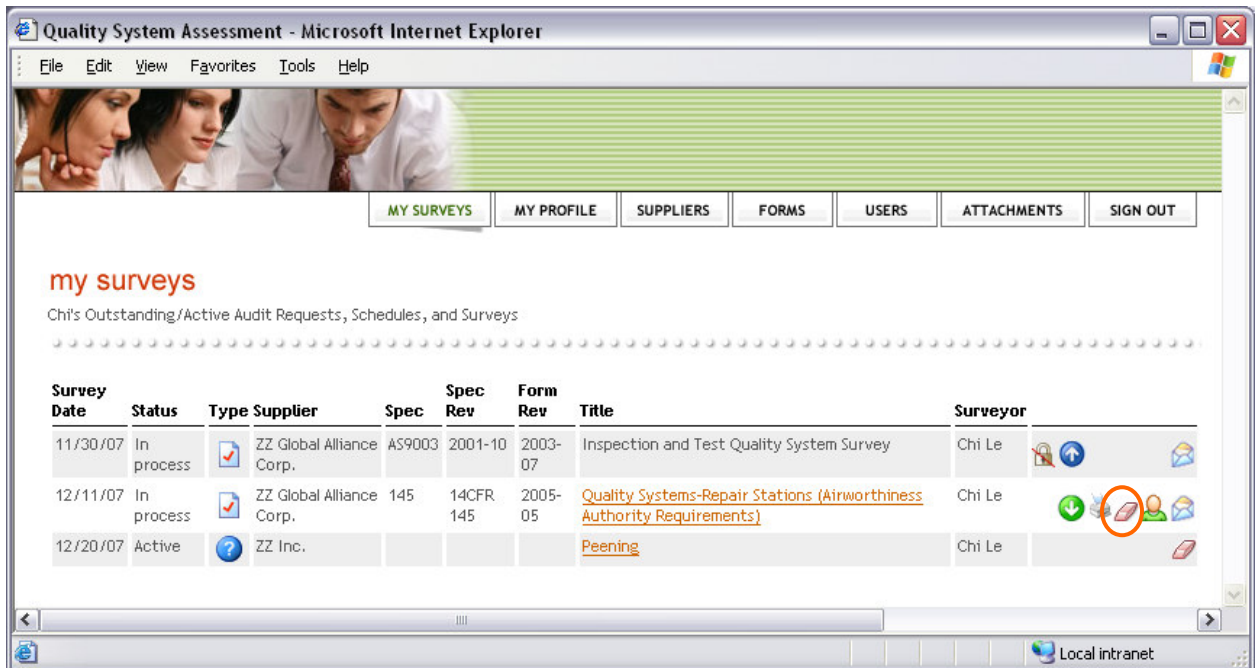


Figure 30 – Delete Survey



# Chapter 3 – Manage Surveys

## Upload Attachment

Only the lead auditor can upload attachment(s) to his/her survey. QSA will accept the following file types:

- Microsoft Word document
- Microsoft Excel workbook
- jpeg/jpg graphic file
- gif graphic file
- Adobe acrobat .pdf file

To upload an attachment, perform the tasks below.

First, navigate to the appropriate survey.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.

Now you are ready to upload the attachment.

- Navigate to the bottom of the “audit checklist” page and click on the “upload document” button.
- On the “survey attachment upload” page as shown below, browse to the file you wish to upload.
- Enter a short description or title of the attachment in the “Title” textbox.
- Click on the “upload” button. The system will confirm if the file was uploaded successfully.

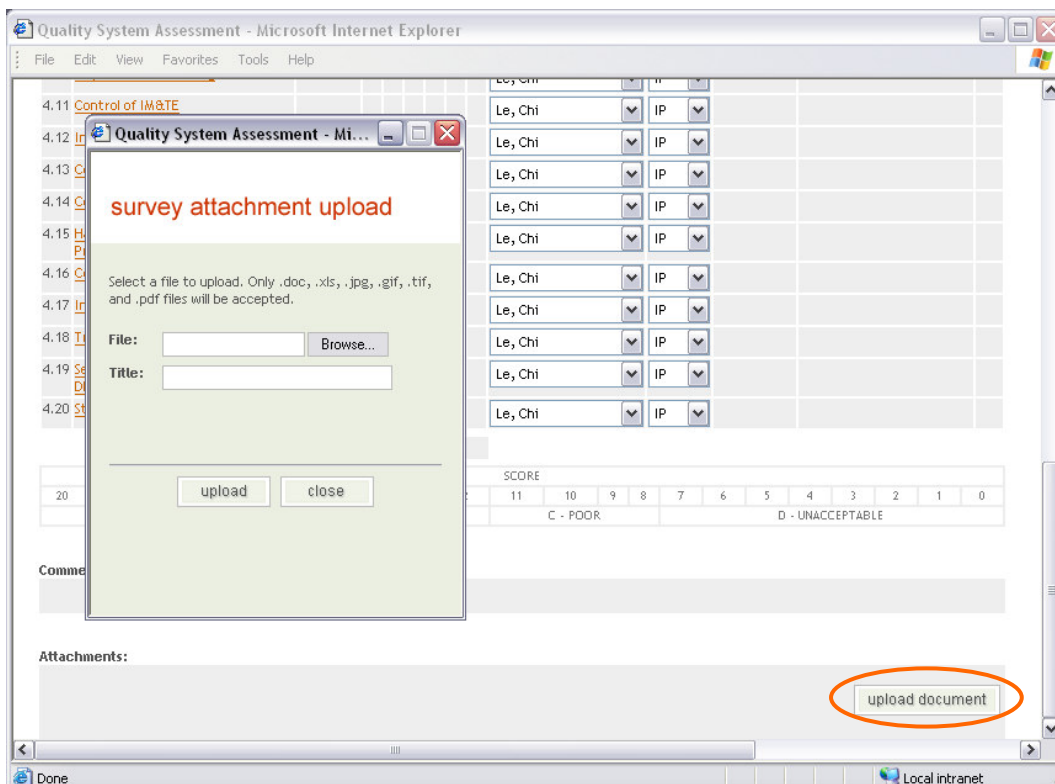


Figure 31 – Upload Attachment

# Chapter 3 – Manage Surveys

## Submit Audit Request

As a procurement quality team leader, you can submit audit requests to other quality team leaders within the aerospace group. To submit a request, follow the steps below:

- Click on the Suppliers tab.
- Search for the supplier by typing the name of the supplier in the "Supplier Name" textbox and click the "search" button.
- At the "suppliers" search result page, click on the desired supplier name to open the supplier record.
- At the "surveys" page, click on the "request audit" button. A popup form will appear on the screen (figure 32).
- Fill out the form. All required entries are marked with asterisks (\*).
- When done, click on the "add" button. The audit request will automatically be sent via email to the selected surveyor for approval.

**Note:** Audit requests are represented by the  icon on the "surveys" and "my surveys" pages.

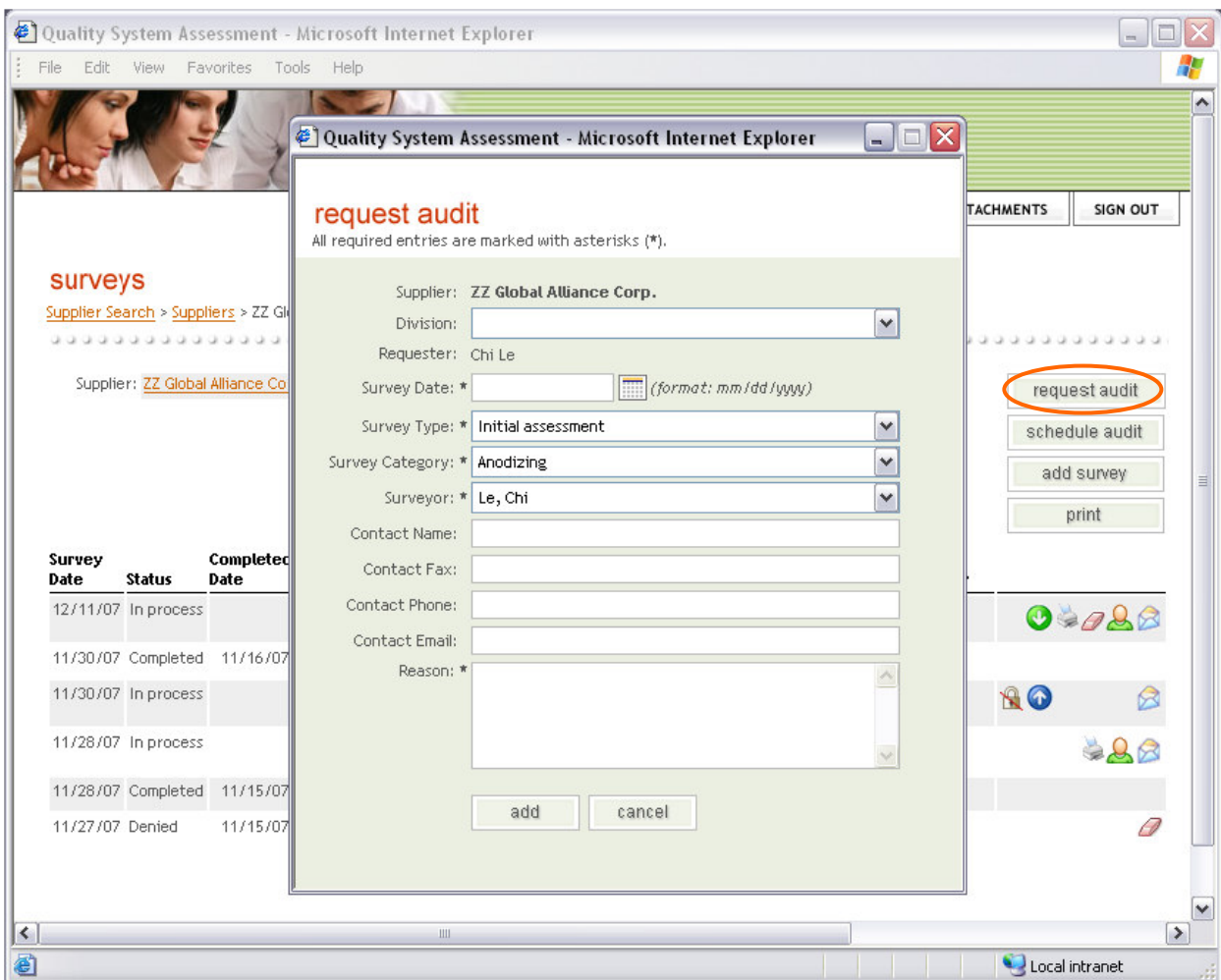


Figure 32 – Request Audit Form

# Chapter 3 – Manage Surveys

## Approve Audit Request

When an audit request is submitted to you for approval, QSA will automatically send you an email notification. To review and approve the request you must first locate it by clicking on the link available in the notification email. The system will prompt you to sign in and then you'll be transferred to the audit request form (figure 33). To approve or deny the request, simply follow the steps below:

- Fill out the form. All required entries are marked with asterisks (\*).
- When done, click on the "save" button. A notification email will automatically be sent to the requester.

**Note:** If you approved the request, QSA will automatically create an audit schedule based on your response.

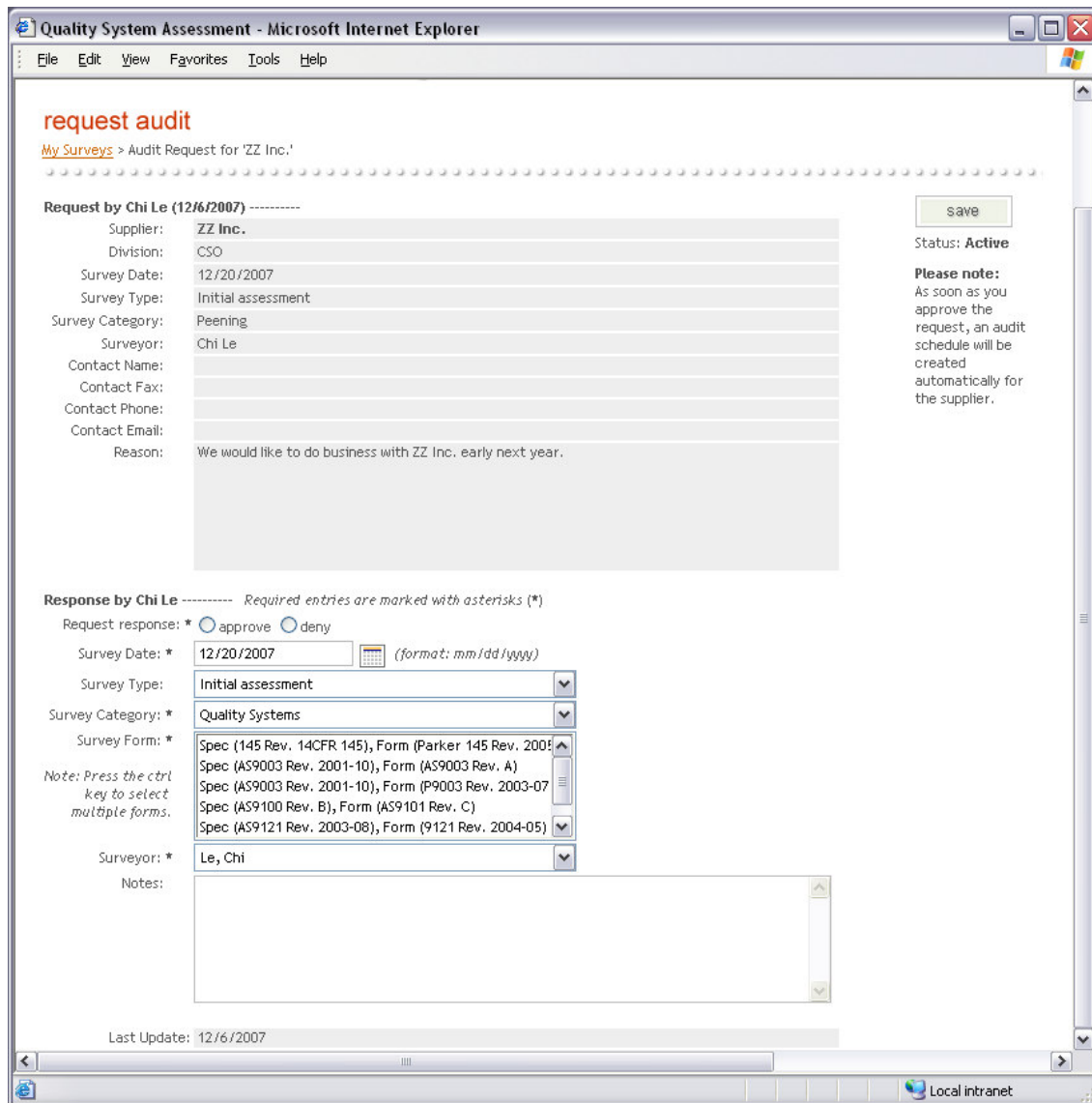


Figure 33 – Approve Audit Request

# Chapter 3 – Manage Surveys

## Schedule Audit

As the surveyor, procurement quality team leader, or administrator, you can schedule audits within QSA. The steps are simple as listed below:

- Click on the Suppliers tab.
- Search for the supplier by typing the name of the supplier in the "Supplier Name" textbox and click the "search" button.
- At the "suppliers" search result page, click on the desired supplier name to open the supplier record.
- At the "surveys" page, click on the "schedule audit" button. A popup form will appear on the screen (figure 34).
- Fill out the form. All required entries are marked with asterisks (\*).
- When done, click on the "add" button.

**Note:** Audit schedules are represented by the  icon on the "surveys" and "my surveys" pages.

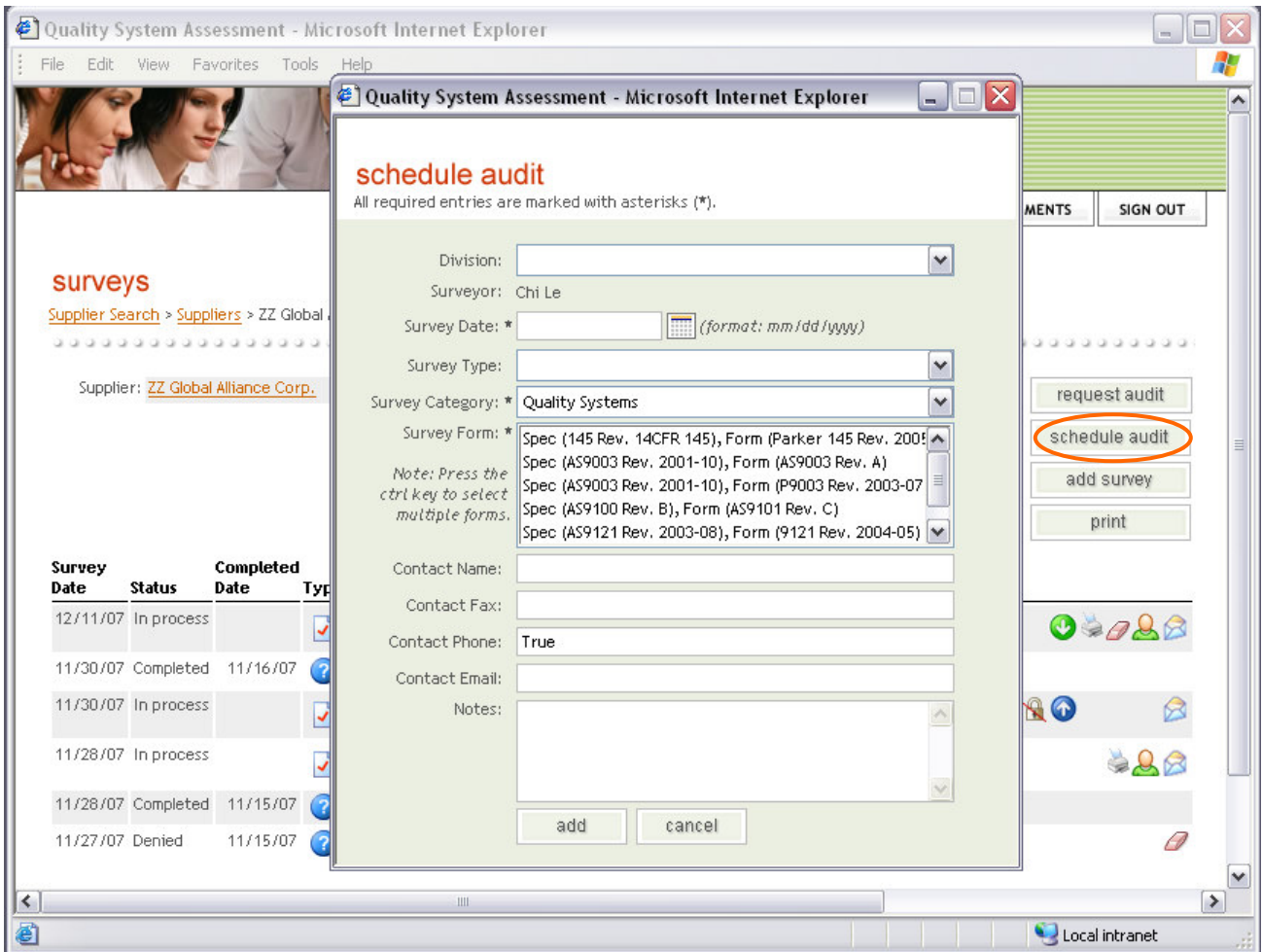


Figure 34 – Schedule Audit

# Chapter 4 – Manage Corrective Action Requests

## Add Corrective Action Request

As the surveyor of a particular audit, you can add a corrective action request to a survey question. Follow the steps below to add a new CAR.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question you would like to add the CAR.
- Click on the "Add" button (as shown below) of that question to open the "corrective action request" page (figure 35).
- Fill in the appropriate corrective information.
- When done filling out the CAR, click the "save" button. The system will confirm that the CAR was successfully saved.

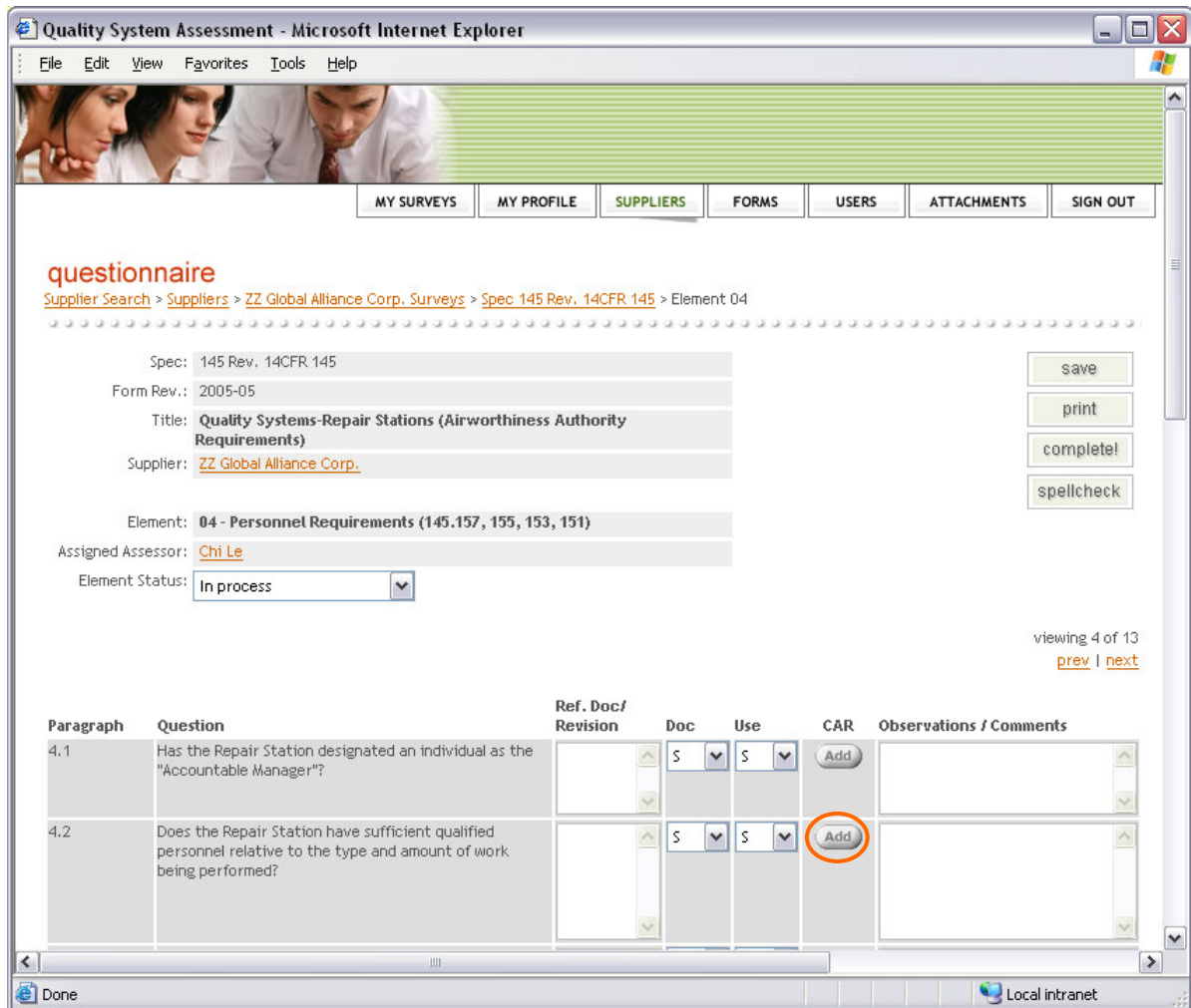


Figure 35 – Add Corrective Action Request

# Chapter 4 – Manage Corrective Action Requests

## CAR Issuance Notification

As the assigned surveyor, you can send email notification to the supplier to let them know that a corrective action request has been issued. Perform the following tasks to email CAR notification:

First, navigate to the appropriate corrective action request.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- At the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.

Now you are ready to send the email.

- On the "corrective action request" form, click on the "e-mail" button to send the supplier the CAR notification, as shown below.
- Enter the supplier name and e-mail address.
- Click on the "send" button.
- The system will confirm that the notification was sent successfully.

Once the supplier receives the CAR notification e-mail, he/she can click a link in the email which will lead to the CAR form. The supplier must sign in to QSA (as described in chapter one under, QSA Login) in order to view the corrective action request. He/she can then respond to the CAR and provide corrective action. All interactions done to the CAR form will be recorded and can be seen by all users.

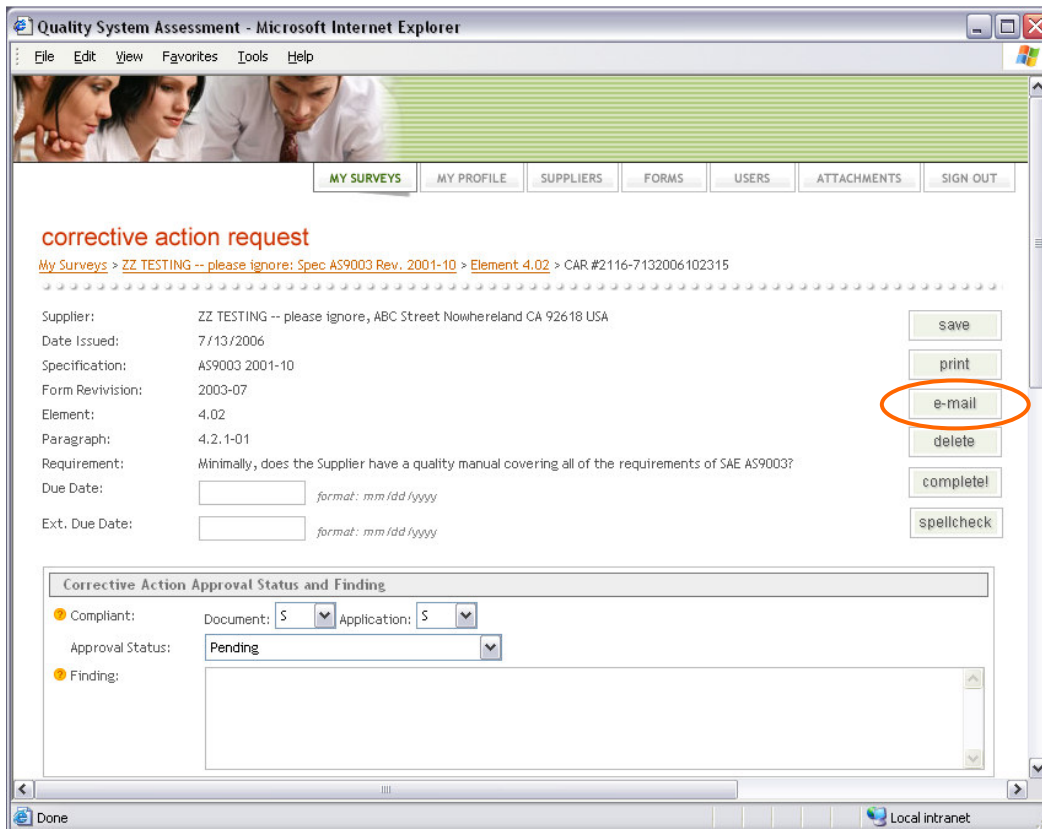


Figure 36 – CAR Notification

# Chapter 4 – Manage Corrective Action Requests

## Add Corrective Action Request Comments

All users can add comments to an open Corrective Action Request. Perform the steps below to add a comment. First, navigate to the appropriate corrective action request.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.

Now you are ready to add a comment.

- On the "corrective action request" page, click on the "add comment" button of the desired corrective action step.
- On the "add comment" page, enter your comments (up to 2000 characters).
- Click on the "add" button. The system will confirm that the comment was successfully added. Click on the "close" button.

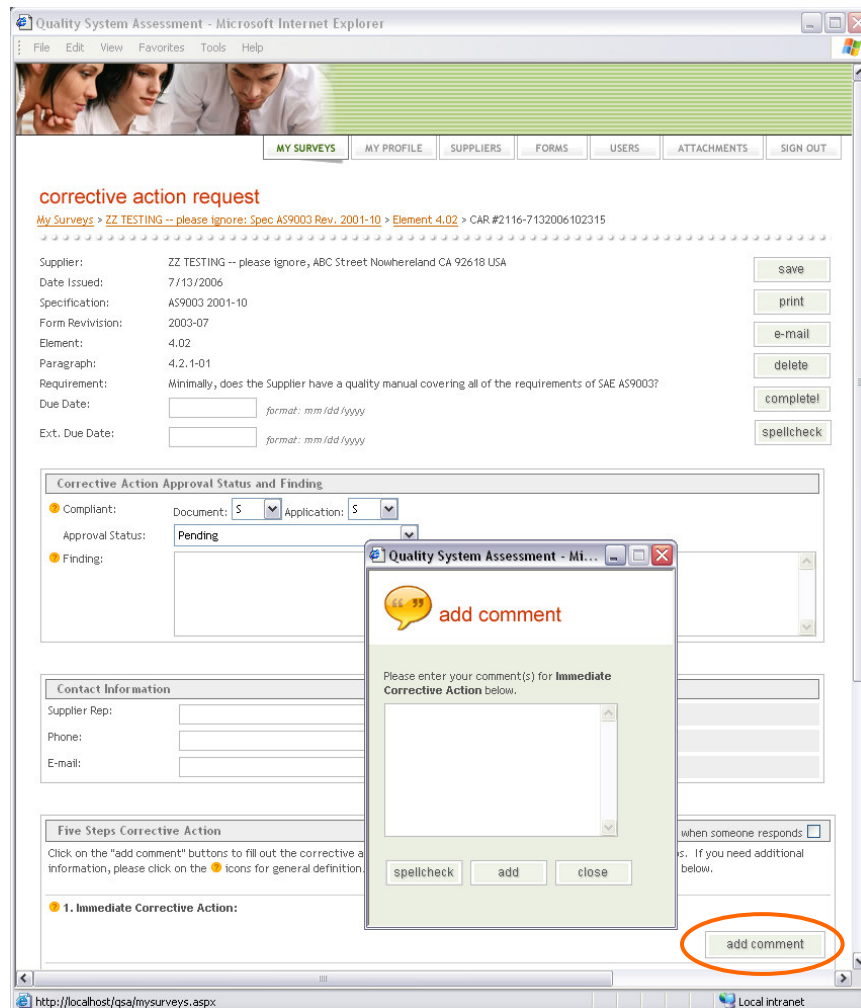



Figure 37 – Add CAR Comment

# Chapter 4 – Manage Corrective Action Requests

## Edit Corrective Action Request Comments

You can now edit your corrective action request comments. To do so, you must first navigate to the appropriate corrective action request.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.
- On the "corrective action request" page, scroll down the page to find the comment you would like to edit. Click on the  button.
- On the "edit comment" page, enter your comments (up to 2000 characters).
- When you are finished, click on the "save" button.

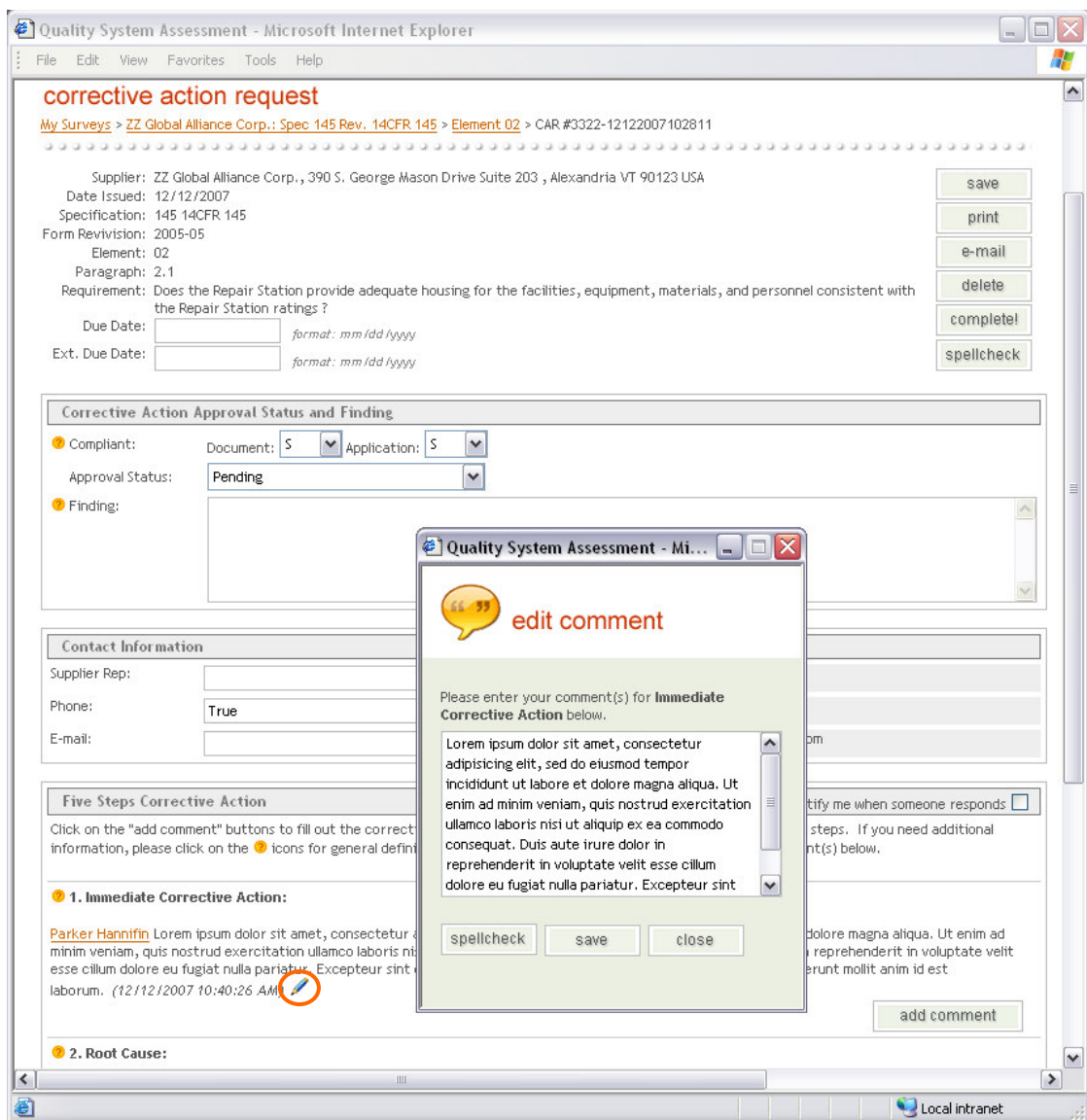


Figure 38 – Edit CAR Comment



# Chapter 4 – Manage Corrective Action Requests

## CAR Response Notification

You can request the system to notify you via email whenever someone responds to a particular CAR.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.
- On the "corrective action request" page, check on the checkbox that says "Notify me when someone responds". An email will be sent to you whenever someone add a comment to that particular CAR (as shown below). Likewise, to undo this feature, simply uncheck the checkbox labeled "Notify me when someone responds".

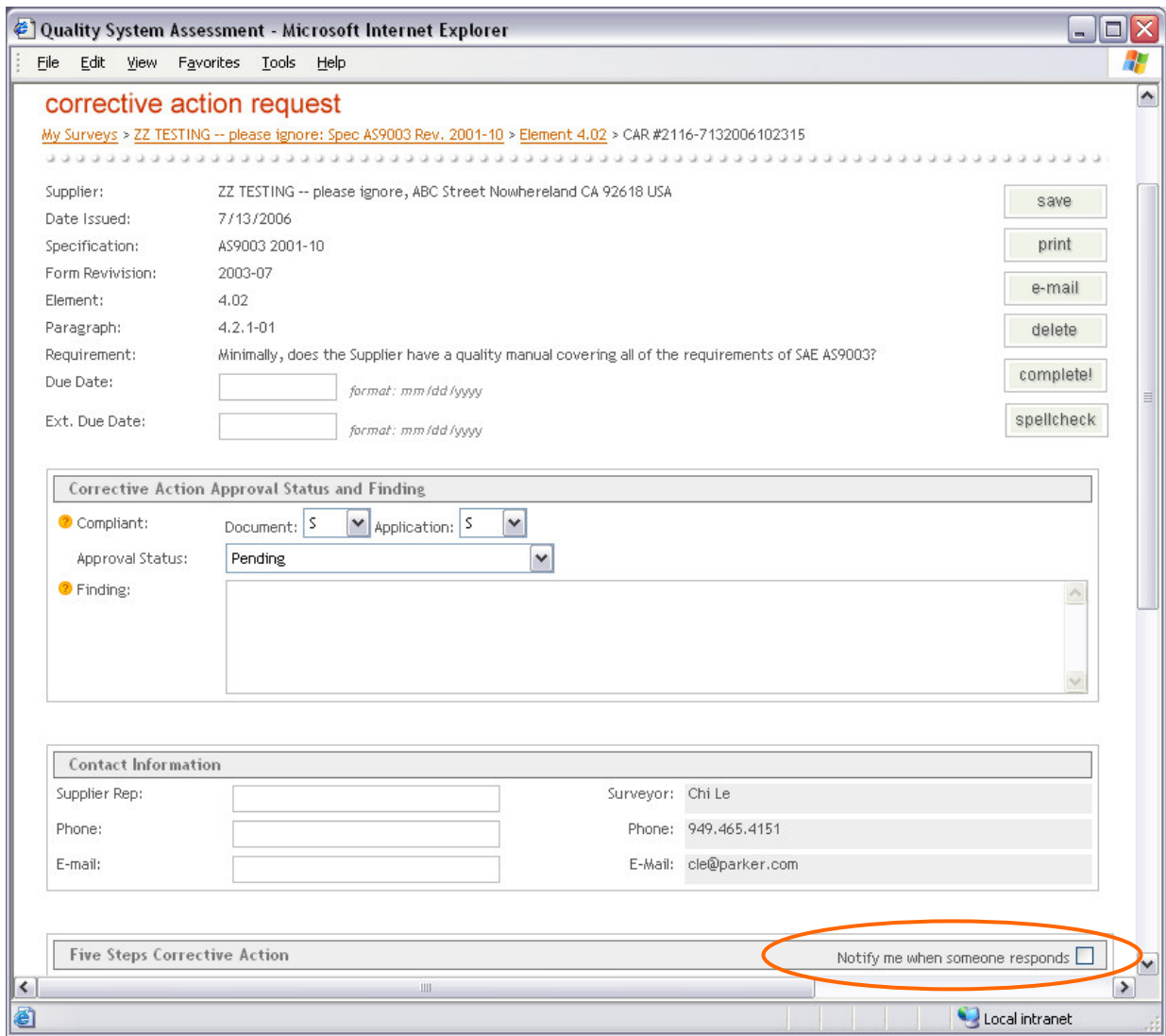


Figure 39 – CAR Response Notification

# Chapter 4 – Manage Corrective Action Requests

## Upload Referenced File

All users can upload a referenced file to an open Corrective Action Request. A referenced file can be used as evidence that a problem has been fixed. Only the following file types will be accepted:

- Microsoft Word document
- Microsoft Excel workbook
- jpeg/jpg graphic file
- gif graphic file
- Adobe acrobat .pdf file

To upload a reference file, perform the tasks below. First, navigate to the appropriate corrective action request.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.

Now you are ready to upload a referenced file.

- On the "corrective action request" page, click on the "upload document" button (located at the bottom of the page).
- On the "CAR file upload" page as shown below, browse to the file you wish to upload.
- Enter a short description or title of the referenced file in the "Title" text box.
- Click on the "upload" button. The system will confirm if the file was uploaded successfully.

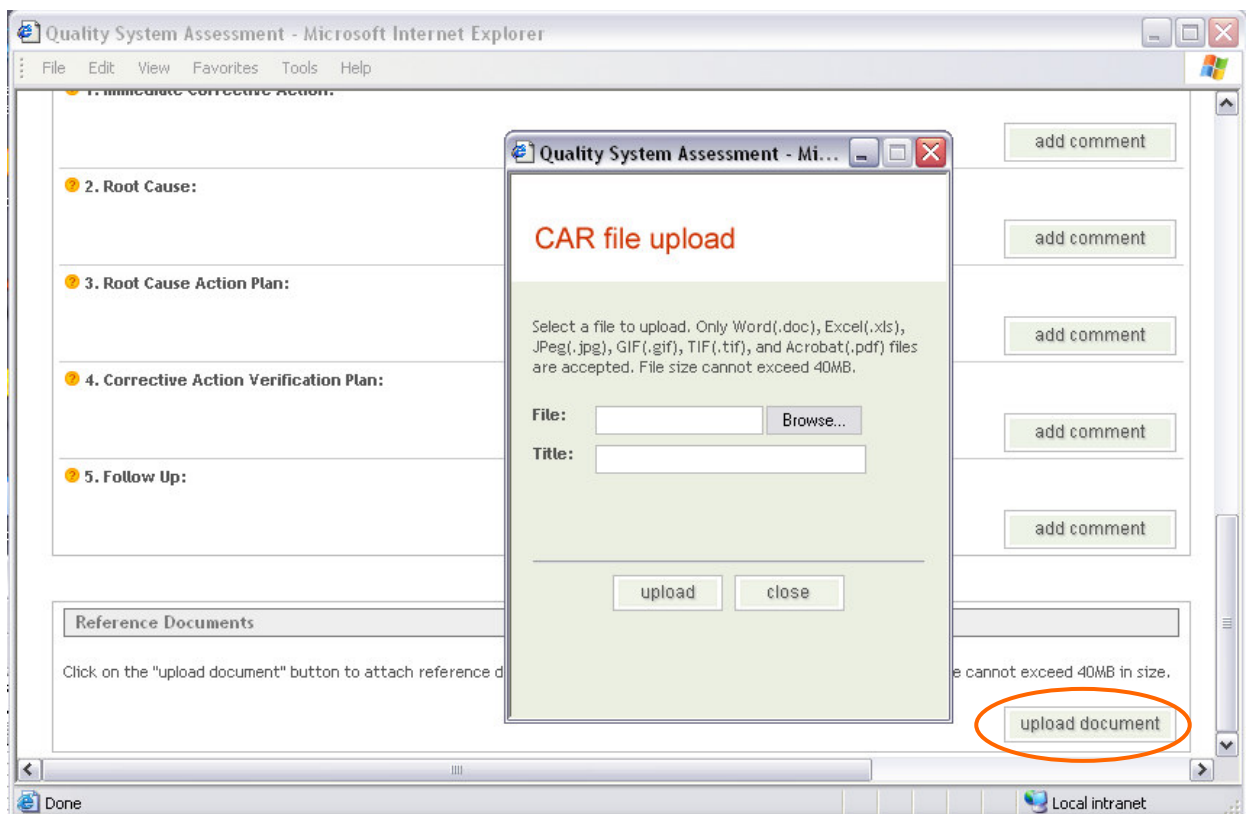


Figure 40 – Upload Reference File

# Chapter 4 – Manage Corrective Action Requests

## Print Corrective Action Request

All users can print a corrective action request form. Do the following tasks to print a CAR:

First, navigate to the appropriate corrective action request.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.

Now you are ready to print.

- On the "corrective action request" page, click on the "print" button to load the print preview page.
- From print preview page, press keys Ctrl+P simultaneously and then the "OK" button.

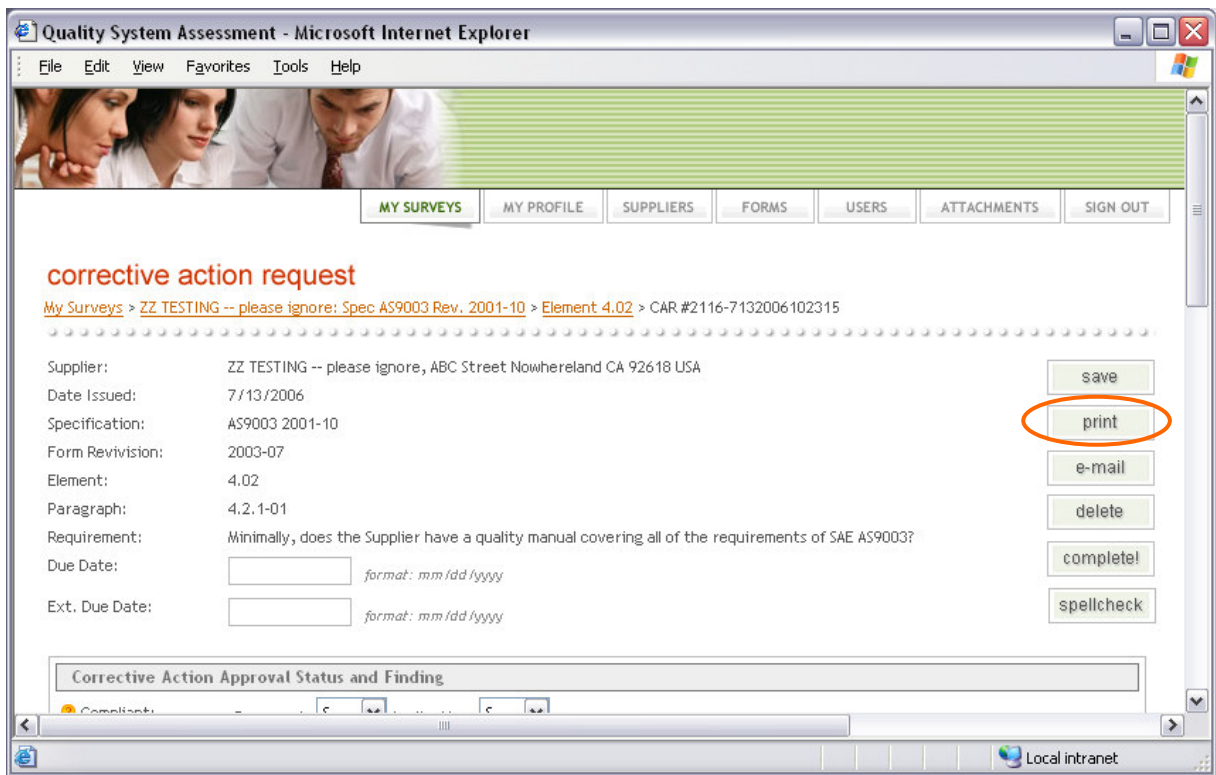


Figure 41 – Print CAR

# Chapter 4 – Manage Corrective Action Requests

## Close Corrective Action Request

Only the assigned surveyor can close a corrective action request. Do the following tasks to close a CAR:

First, navigate to the appropriate corrective action request.

- Click on My Surveys tab.
- Locate the survey of your choice and select it.
- Locate the appropriate element and select it.
- On the "questionnaire" page, locate the question and CAR of your choice.
- Click on the CAR link to open the "corrective action request" form.

Now you are ready to close the CAR. Once closed, no one will be able to update it, not even the assigned surveyor.

- On the "corrective action request" page, update the "Approval Status" appropriately.
- Click on the "save" button and the system will confirm if the data was saved successfully.
- Click on the "completed!" button to close the CAR.

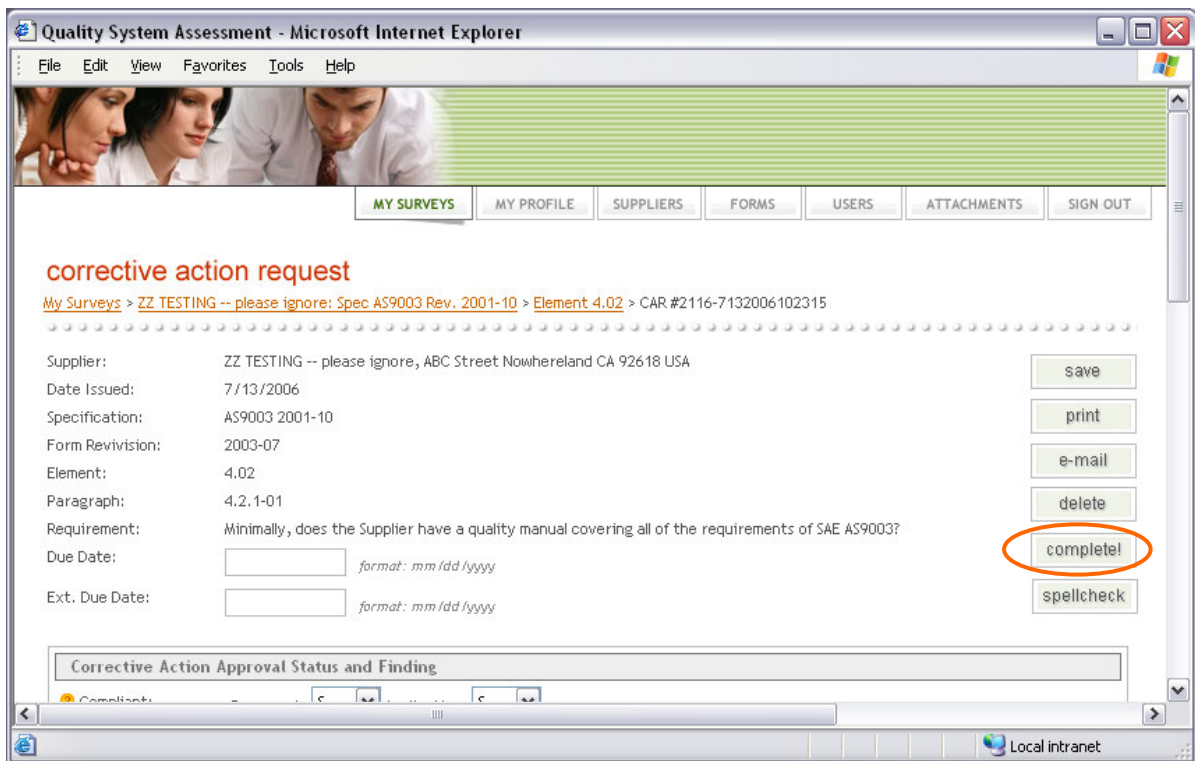


Figure 42 – Close CAR

# Chapter 4 – Manage Corrective Action Requests

## 30, 60, & 90 Days Delinquent CAR Alert

Reminder emails will automatically be sent to auditors when their corrective action requests are 30, 60, or 90 days delinquent. In other words, a CAR is considered as 30 days delinquent when it remains pending 30 days passed the issued date.

Below is a sample email reminder.

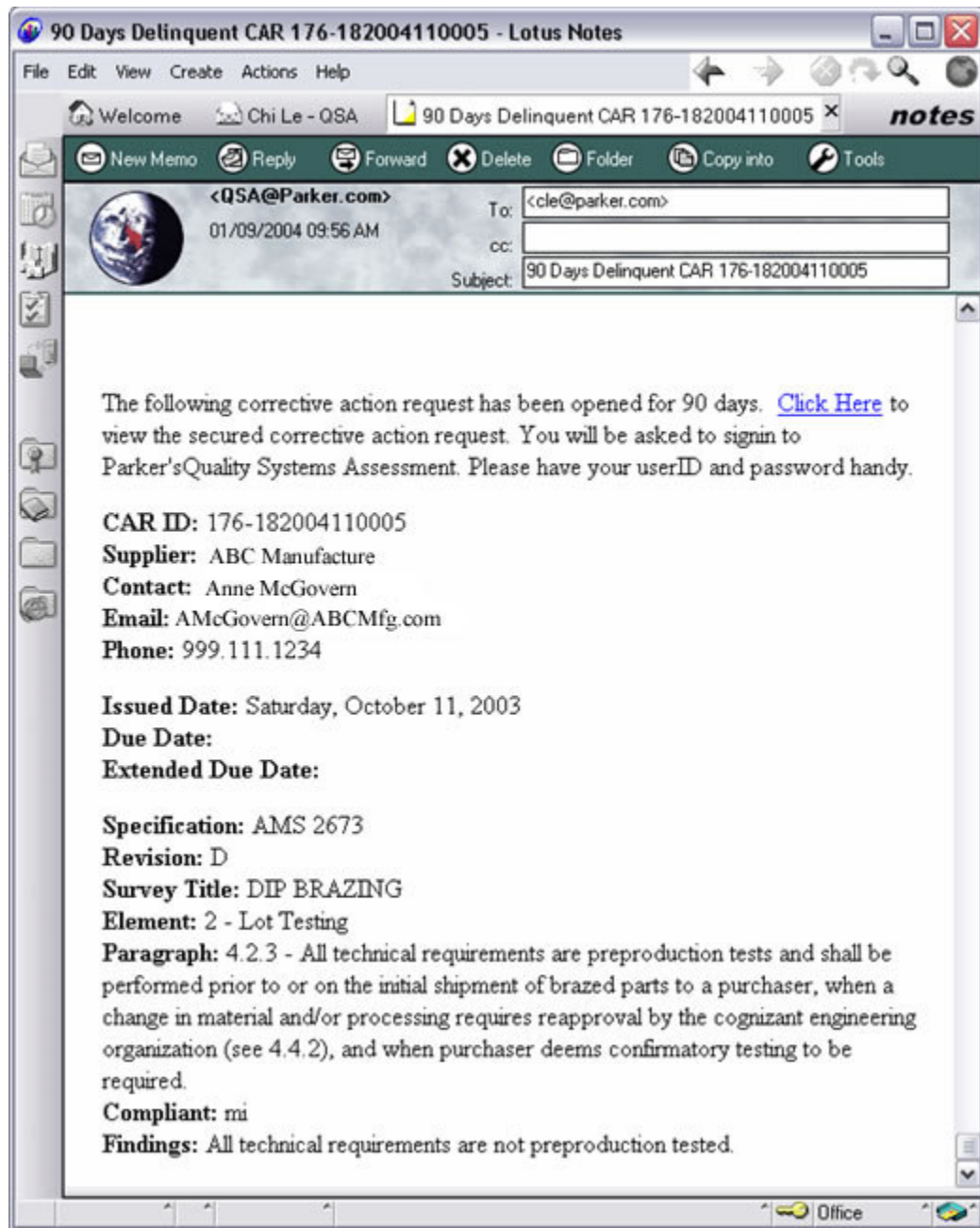


Figure 43 – Delinquent CAR Email Alert


# Chapter 5 – QSA Editor

## Install QSA Editor

**What is QSA Editor?** It is an application, more specifically, an editor. It will enable you to view and update the downloaded surveys.


**How do I install QSA Editor onto my laptop?** The installation process is very simple. If you need technical support, please contact your divisional IT team or Help Desk at 949.465.HELP (4357). Follow the step-by-step instructions below.

First, download the setup files onto your laptop.

- Click on My Surveys tab.
- On the “my surveys” page, locate the survey you wish to download.
- Click on the associated “download” button  of that survey (as shown in figure 41).
- On the “survey download” page, please note the highlighted yellow box (figure 42). It contains the link to the QSA Editor setup files and instructions for the installation.
- Click on the link labeled “Click here” inside the highlighted box. A popup form, called “File Download” will appear on your screen.
- Click on the “Save” or “Run” button to extract the setup files onto your laptop. A popup form, called “WinZip Self-Extractor” will appear on your screen (figure 43).
- Click on the Unzip button to save the setup files to the default folder “c:\QSASetup”. The system will inform you that 4 files were unzipped successfully. Click on the “OK” button.
- Click on the “Close” button of the WinZip Self-Extractor window.

Next, let’s run the setup program (setup.exe) to install QSA Editor.

- Open your Windows Explorer (My Computer) and navigate to the “c:\QSASetup” directory on your laptop (figure 44). Double-click on the setup.exe file to execute it. Click on the “OK” button to start the QSA Editor Setup.
- On the “Welcome to the QSA Editor Setup Wizard” window (as shown in figure 45), click on the “Next” button.
- On the “Select Installation Folder” window, click on the “Next” button (figure 46).
- On the “Confirm Installation” window, click on the “Next” button (figure 47).
- On the “Installation Complete” window, click on the “Close” button (figure 48).
- On the “Installation succeeded” window, click on the “OK” button.

Congratulations! You have successfully installed QSA Editor onto your laptop. You should see an icon labeled “QSA Editor”  on your desktop.

# Chapter 5 – QSA Editor

## Install QSA Editor (continued)

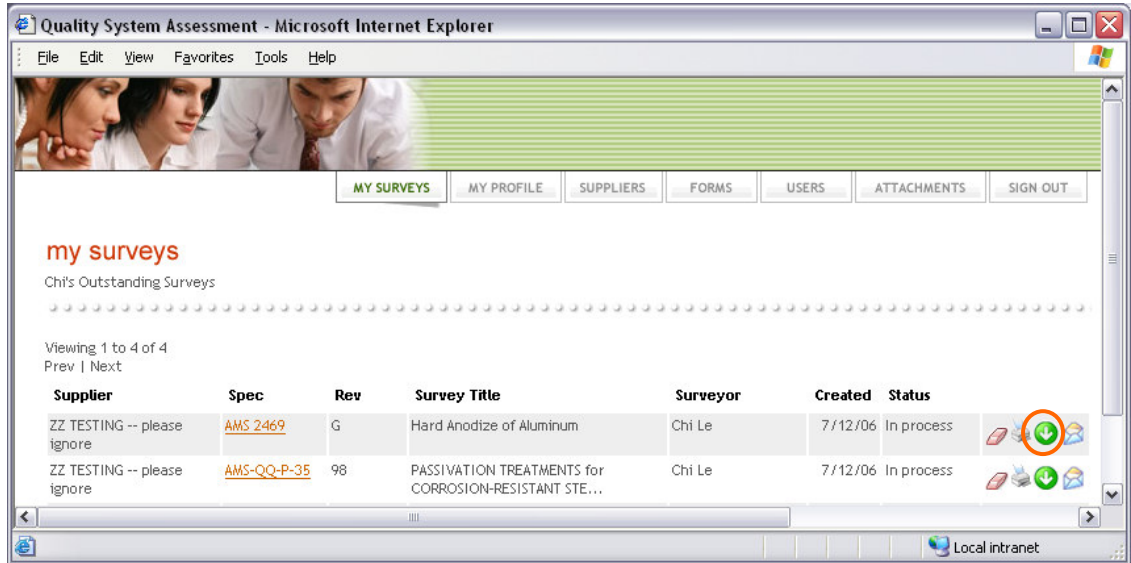


Figure 44 – Download Button

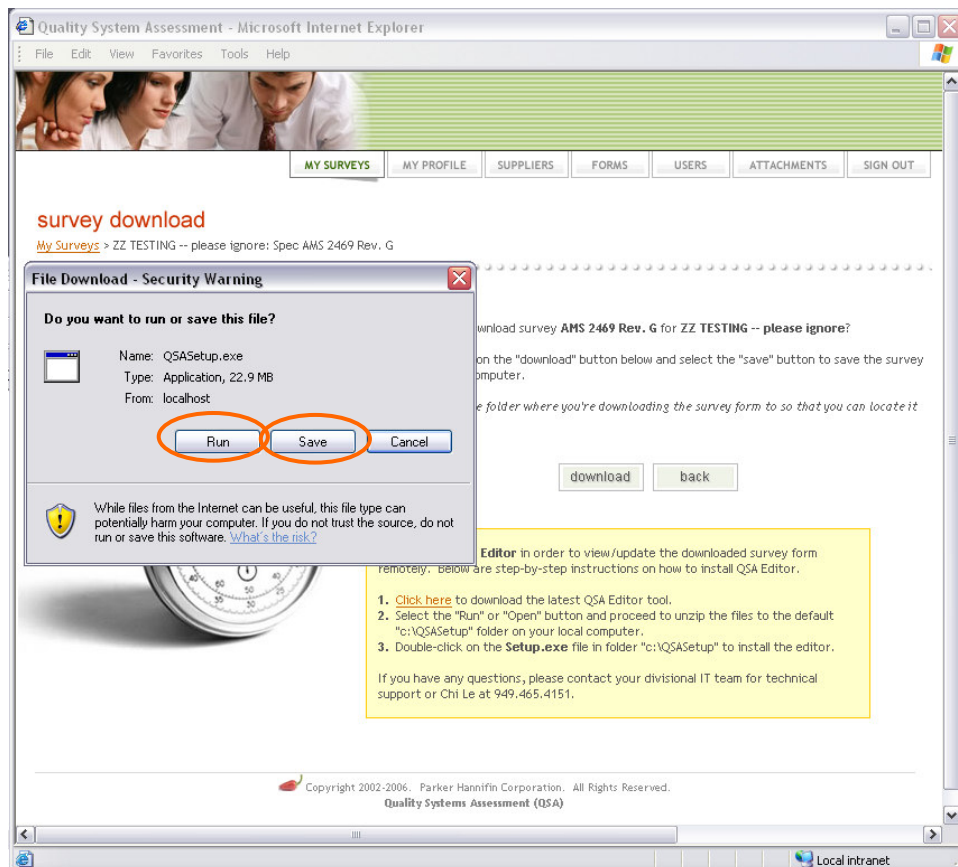


Figure 44 – QSA Editor Zip File Download

# Chapter 5 – QSA Editor

## Install QSA Editor (continued)

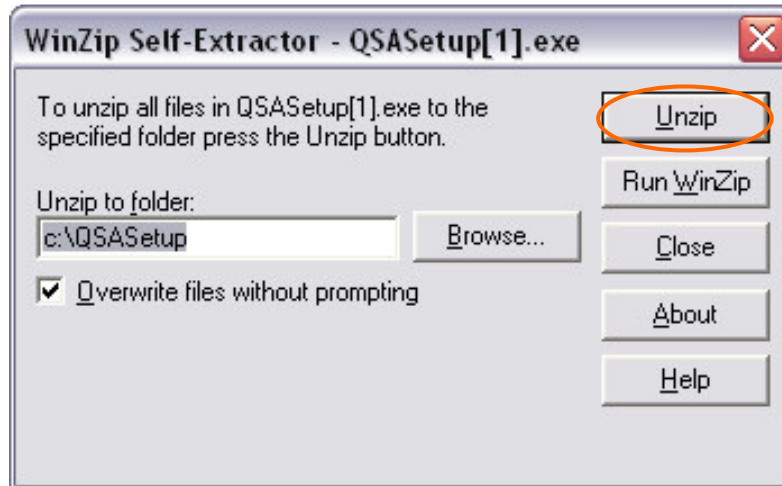


Figure 45 – Extract QSA Editor Zip File

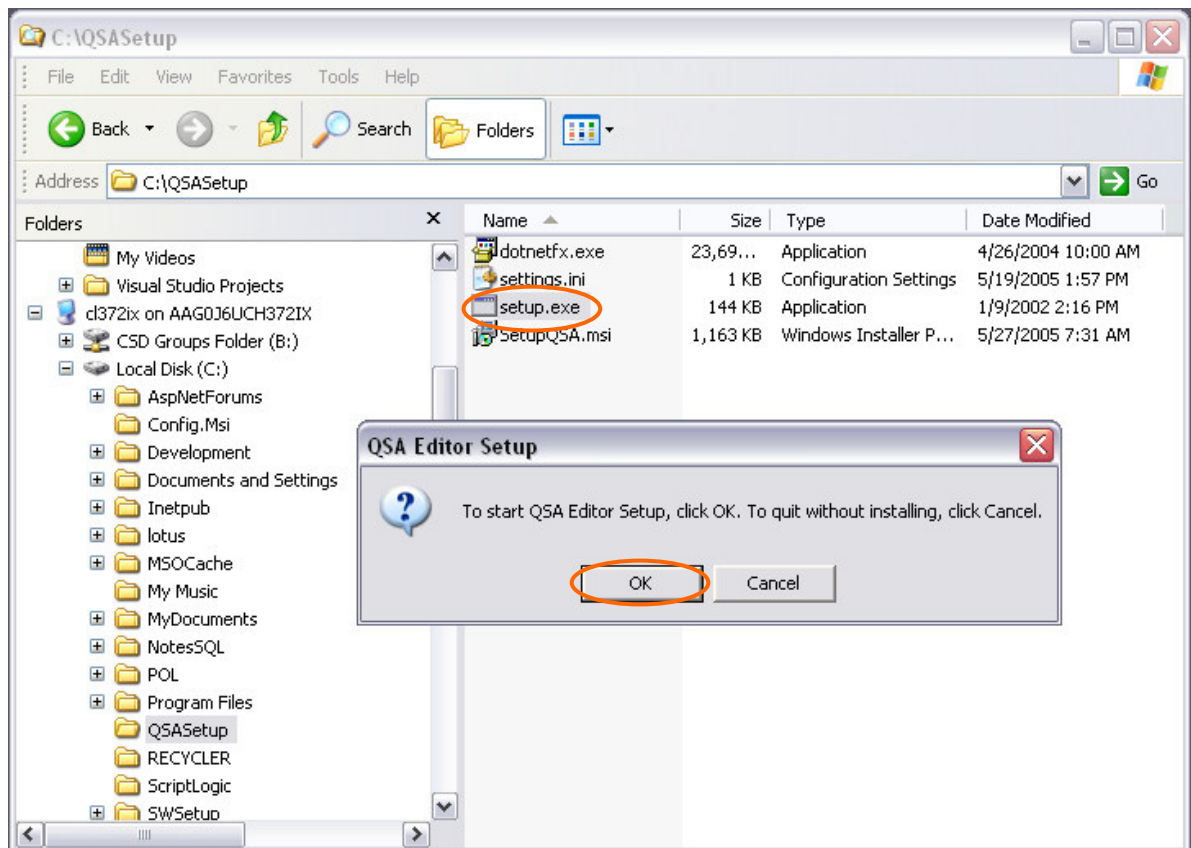


Figure 46 – Setup.exe



# Chapter 5 – QSA Editor

## Install QSA Editor (continued)

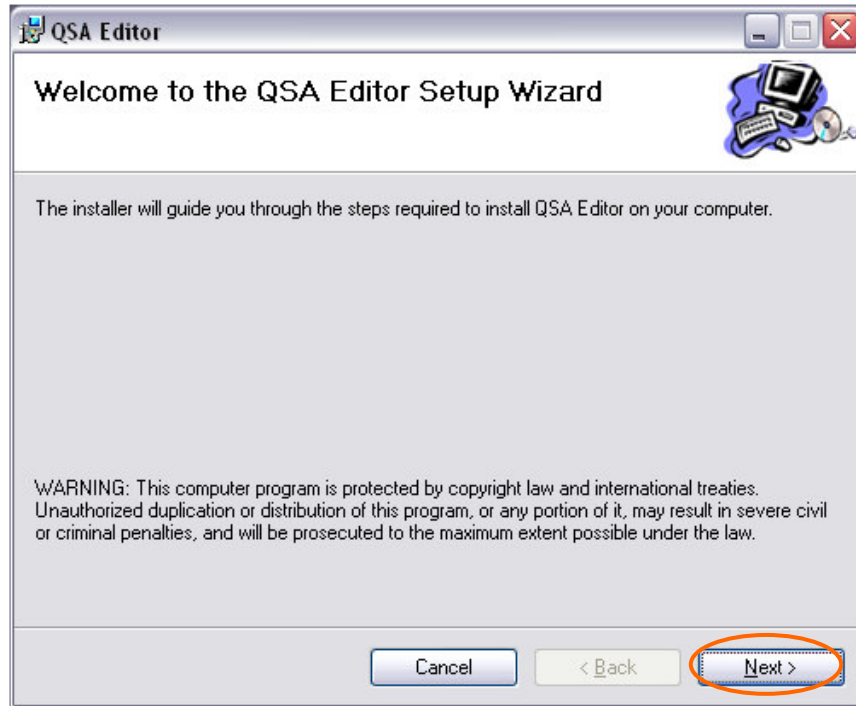


Figure 47 – Welcome to the QSA Editor Setup Wizard



Figure 48 – Select Installation Folder

# Chapter 5 – QSA Editor

## Install QSA Editor (continued)

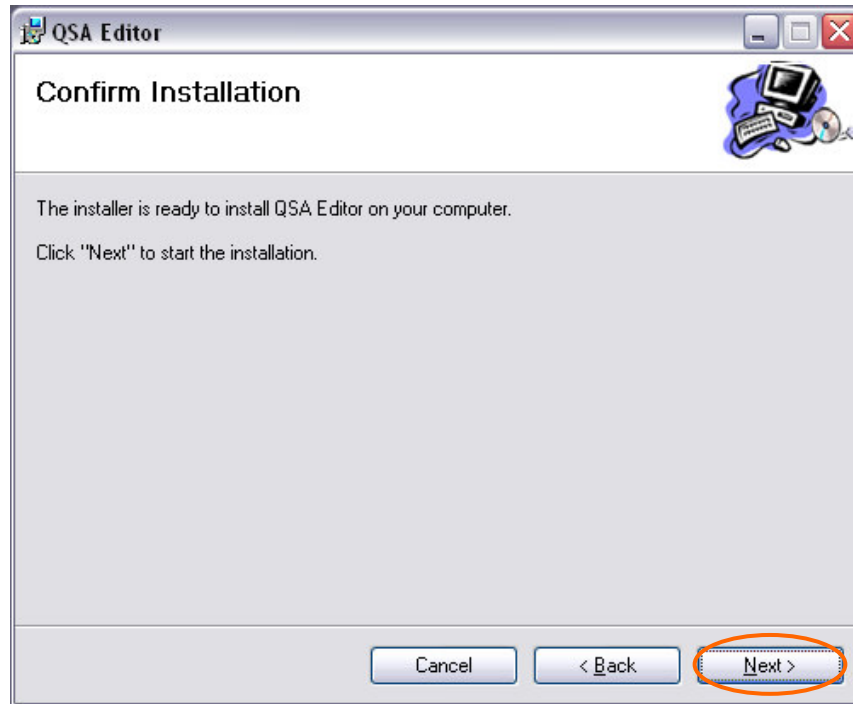


Figure 49 – Confirm Installation

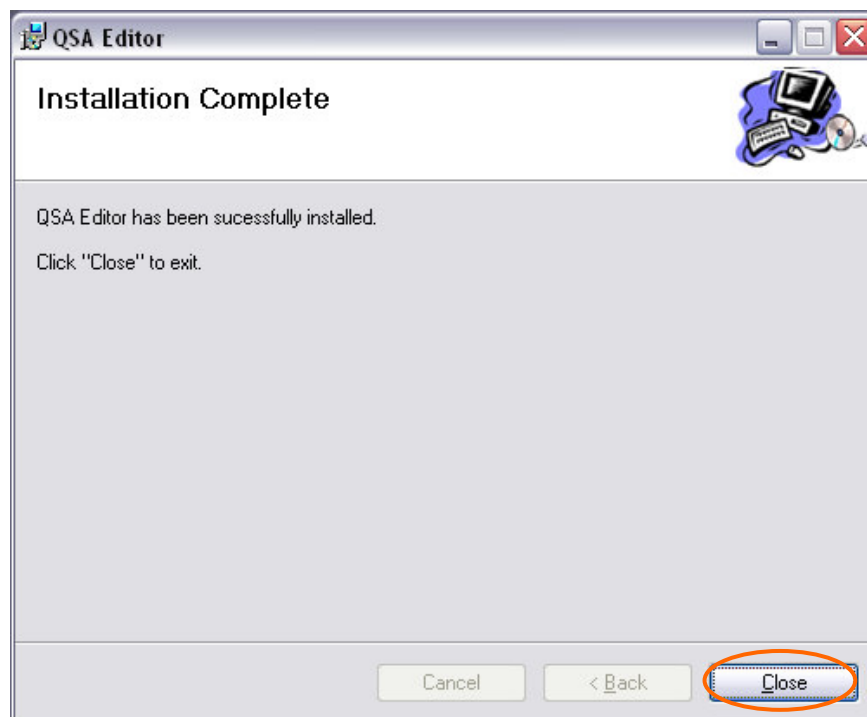


Figure 50 – Installation Complete

# Chapter 5 – QSA Editor

## Launch QSA Editor


You can launch QSA Editor simply by double-clicking on the “QSA Editor”  icon on your desktop. You will see a window similar to below.



Figure 51- QSA Editor

# Chapter 5 – QSA Editor

## Updating Downloaded Survey

You can easily update downloaded surveys using QSA Editor. Follow the steps below.

- Launch QSA Editor (refer to the previous page for more information).
- Select menu option "File" and then "Open". You will see popup form "Open Survey" on your screen (figure 50).
- Navigation to the folder where you store the downloaded survey file. Select the survey file and click on the Open button. You will immediately see the survey on screen (figure 51).

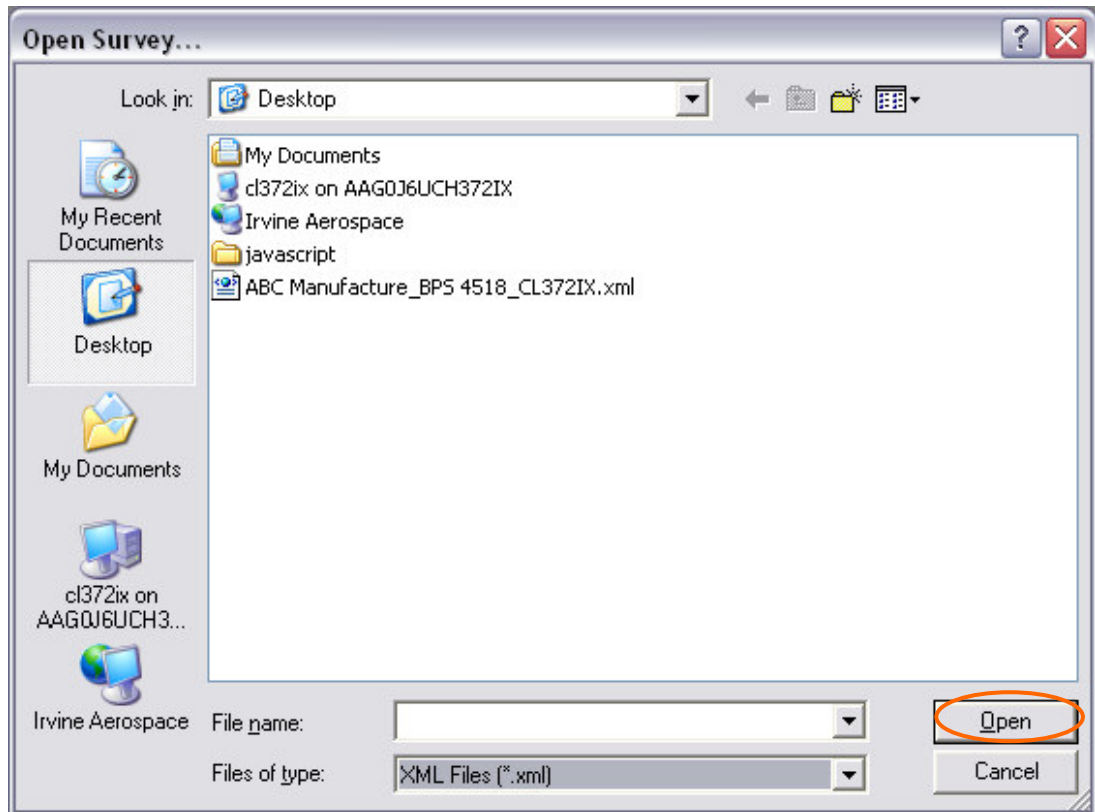


Figure 52 – Open Survey...

- You will only be able to update the elements that are assigned to you. To edit a particular element, simply right mouse click on the element line item and select "Edit" from the popup menu.
- After you've completed your updates, select main menu option "File" and then "Save" to save your changes.

# Chapter 5 – QSA Editor

## Update Downloaded Survey

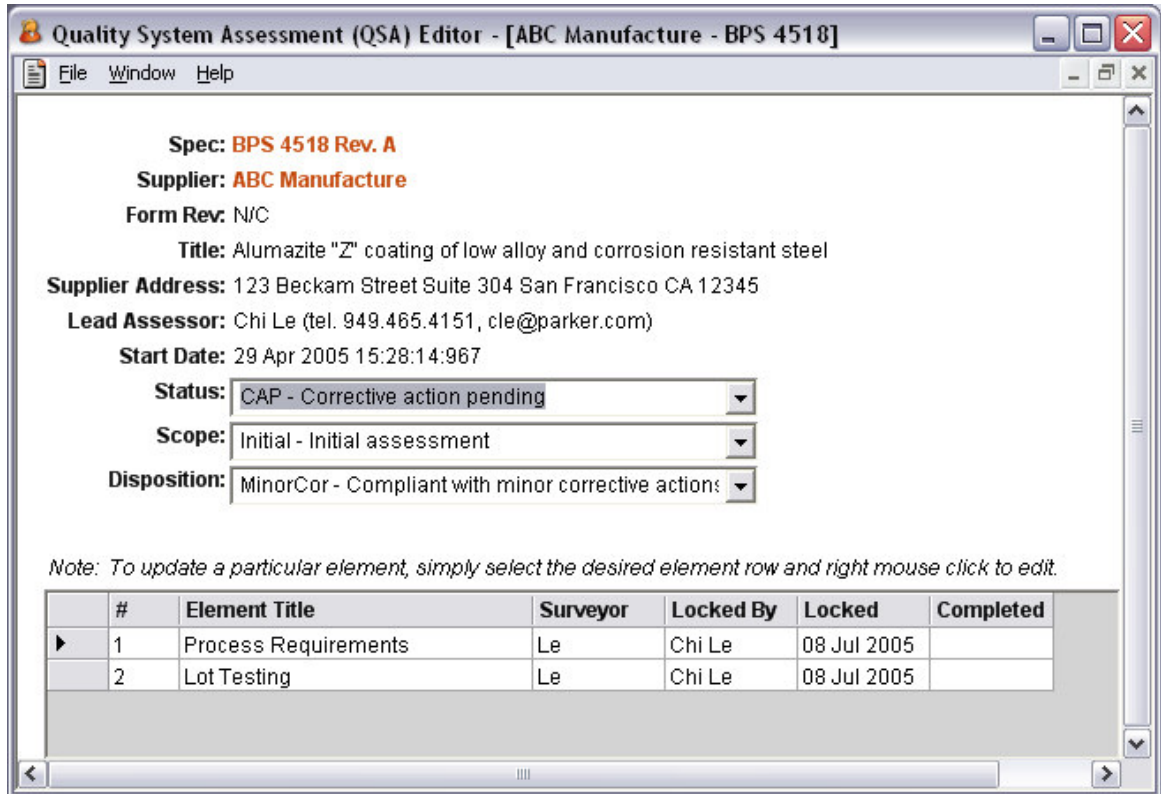


Figure 54 – Downloaded Survey

# Appendix A - User Permissions

QSA supports five types of users; surveyor, procurement quality team leader, vendor, generic user, and administrator.

A **surveyor** can view all audits in the database without any restrictions. He can schedule, and add new audits, as well as updates the ones he authors or is assigned to. He can also issue corrective action requests.

A **procurement quality team leader** has all the capabilities of a surveyor and he is the only user who can place and approve audit requests.

A **vendor** can view his company’s audit cover sheets and respond to corrective action requests.

A **generic user** can view all audits in the database without any restrictions.

An **administrator** is a super user. In addition to having the same permissions as a surveyor, he can also manage blank survey forms, uploaded document, and user profiles.

Below is a summary table of the specific permissions each user type has.

User type	Survey Status		
	<i>Approved, Disapproved, Cancelled, or Conditional Approval</i>	<i>In Process and Lock</i>	<i>In Process and Unlock</i>
Lead Auditor <sup>1</sup>	View, Print, Email Blank Survey	Unlock, Upload, Email Blank Survey	View, Download, Print, Delete, Edit, Email Blank Survey
Assigned Auditor <sup>2</sup>	View, Print, Email Blank Survey	Email Blank Survey	View, Download, Print, Edit, Email blank Survey
Administrator	View, Print, Reassign Lead Surveyor, Email Blank Survey	Email Blank Survey	View, Print, Reassign Lead Surveyor, Email Blank Survey
Vendor	View, Print, Email Blank Survey	Email Blank Survey	View, Print, Email Blank Survey
Generic User	Print, View, Email Blank Survey	Email Blank Survey	View, Print, Email Blank Survey

<sup>1</sup> The lead auditor is a surveyor or procurement quality team leader who created the audit and serves as the lead auditor.

<sup>2</sup> The assigned auditor is a surveyor or procurement quality team leader who is assigned to audit one or more element(s) of the survey.

## Appendix A - User Permissions (continued)

User type	Audit Request Status	
	Active	Completed or Denied
Requester <sup>3</sup>	View, Edit	View
Approver <sup>4</sup>	Approve	View
All other users	View	View

<sup>3</sup> The requester is a procurement quality team leader who submitted the request for an audit.

<sup>4</sup> The approver is the person to whom the audit request was submitted to. The approver must be a procurement quality team leader.

User type	Audit Schedule Status	
	Active	Completed
Scheduler <sup>5</sup>	View, Edit, Add Survey	
All other users	View	

<sup>5</sup> The scheduler is a procurement quality team leader or survey who scheduled the audit.