HOW TO ADD OR CHANGE THE STANDARD FORMS AND OR CAMPUS MANAGEMENT SYSTEM

In this Training Manual you will be shown how to add or change the standard forms and checklist.

Note: the same steps (methodology) apply to the Campus Management System (Polices, Process maps, Forms & Checklists)

Step 1:

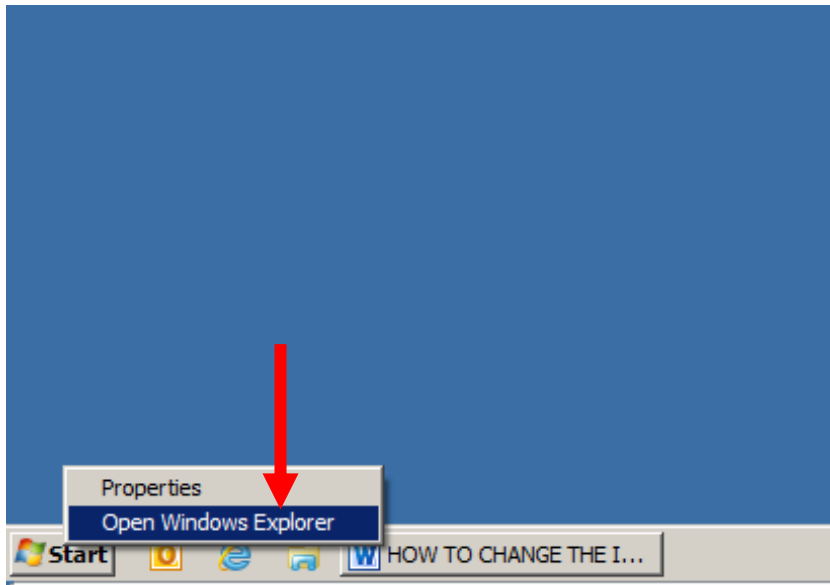"Right Click" on the start menu and select Explore (Indicated in Figure 1)

Figure 1 notes:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Step 2:

Navigate to the location where you have installed the KZNCN Campus QMS and "click" on the plus sign to drop down the "Tree View" (Indicated in Figure 2)

The picture in figure 2 indicates that the KZNCN Campus QMS are installed under the C:/Drive.
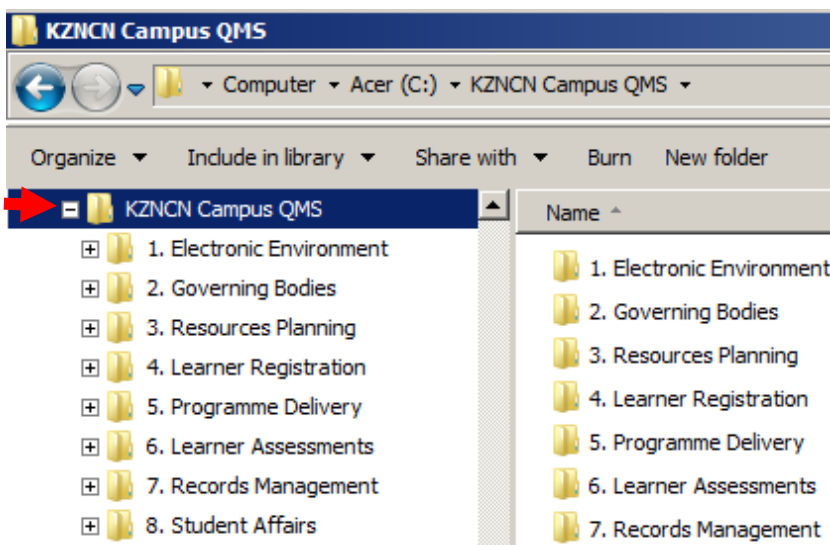

Figure 2 notes:

_____

_____

_____

_____

_____

_____

_____

_____

_____

HOW TO ADD OR CHANGE THE STANDARD FORMS AND OR CAMPUS MANAGEMENT SYSTEM

Step 3:

"Right Click" on the KZNCN Campus QMS folder in the left window and select properties.
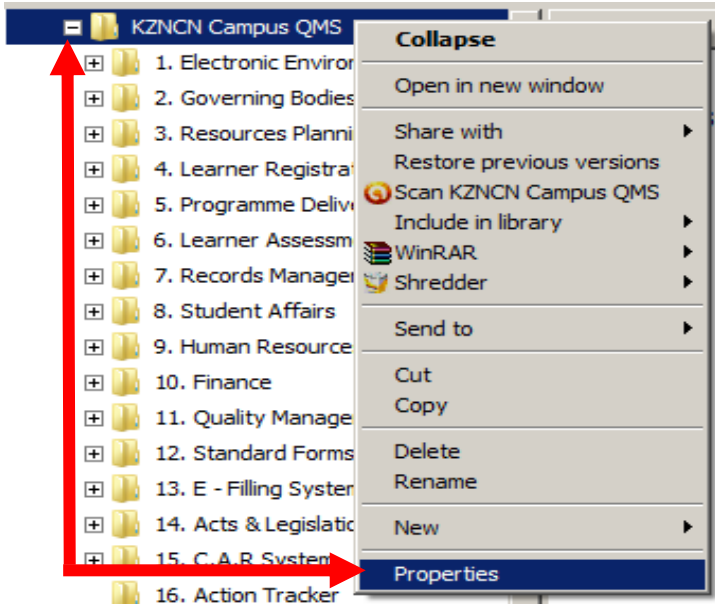
(Indicated in Figure 3)

Figure 3 notes:

_____

_____

_____

_____

_____

_____

_____

_____

Step 4:

Ensure that the read only "Tick Box" is removed so that you can save the changes that you are going to make, click apply changes to folder, subfolders and files.
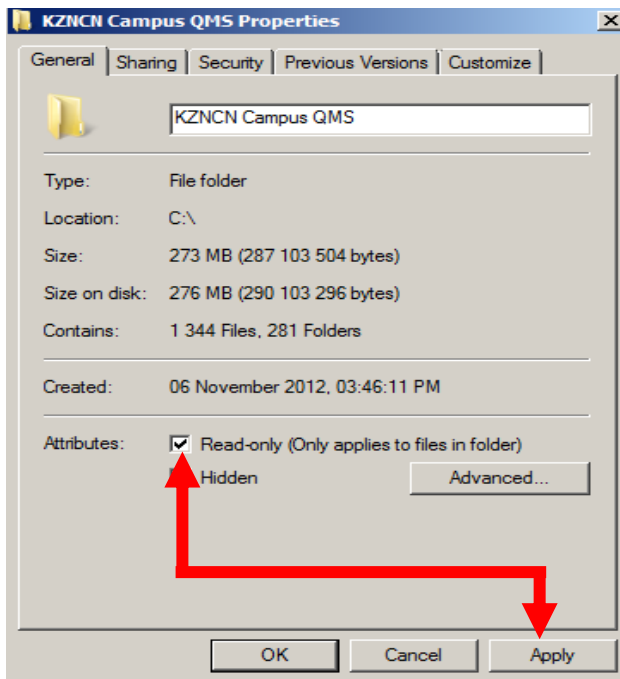
(Indicated in Figure 4)

Figure 4 notes:

_____

_____

_____

_____

_____

_____

_____

_____

Important Note: If you do not remove the "Read Only" you will not be able to save the changes you have made in the document going forward.

Step 5:

Navigate to the 12. Standard Forms & Checklists folder and "click" on the plus sign to drop down the "Tree View" (Indicated in Figure 5)
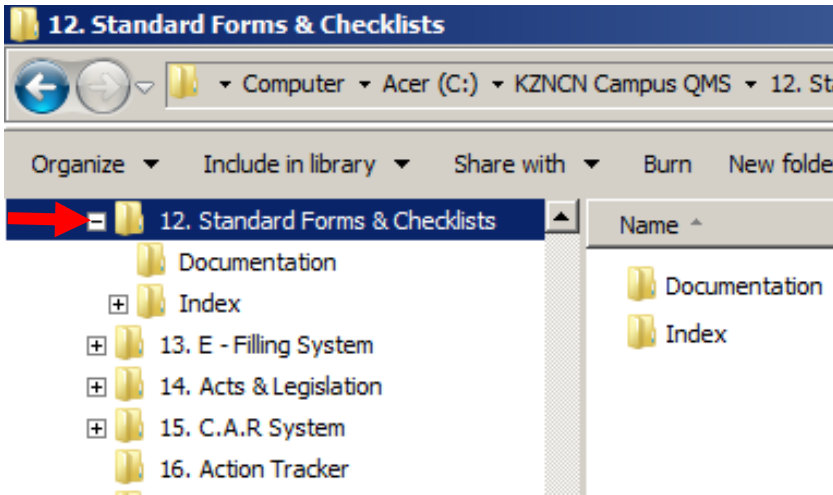

Figure 5 notes:

_____

_____

_____

_____

_____

_____

_____

_____

Step 6:

Navigate to the next Documentation folder and select.

(Indicated in Figure 6)
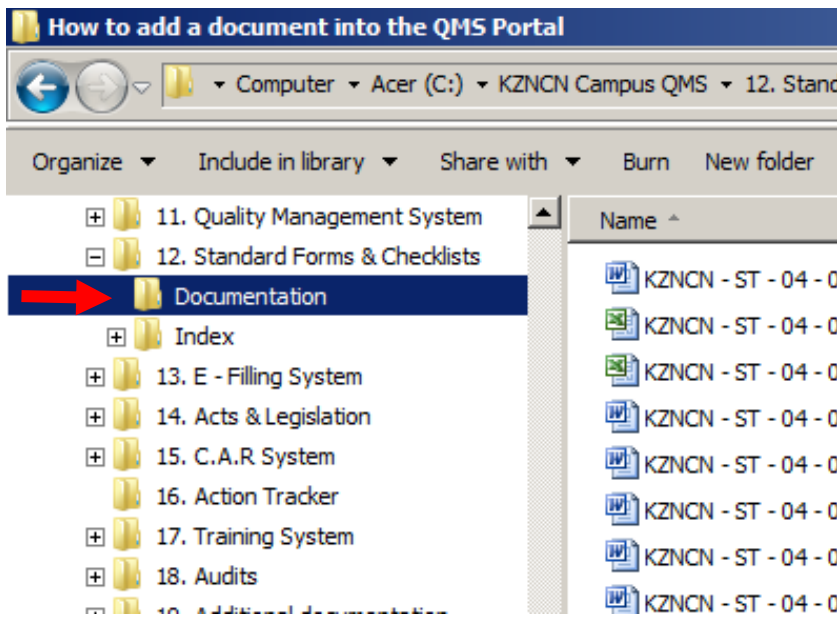
Figure 6 notes:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Step 7:

On the left screen (window) you can now insert the new document or amend (change) the current documentation.

(Indicated in Figure 7)

Figure 7 notes:

Important note: The document (File) name must remain the same otherwise the hyperlink will be lost from the main QMS Portal

Step 8:

To add a new document "right click" on the KZNCN - ST - 04 – 014 - forms & checklist template and select Copy.
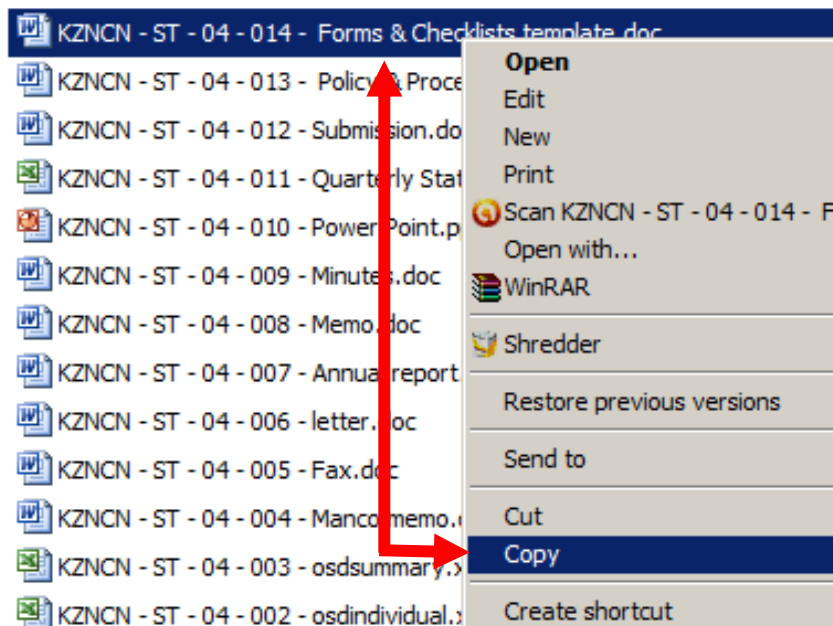
(Indicated in Figure 8)

Figure 8 notes:

Step 9:

To add a new document "right click" on an open space and select paste to paste a copy of KZNCN - ST - 04 – 014 - forms & checklist template (you have now created a copy of the KZNCN - ST - 04 – 014 - forms & checklist template – copy that will be used for your new document)
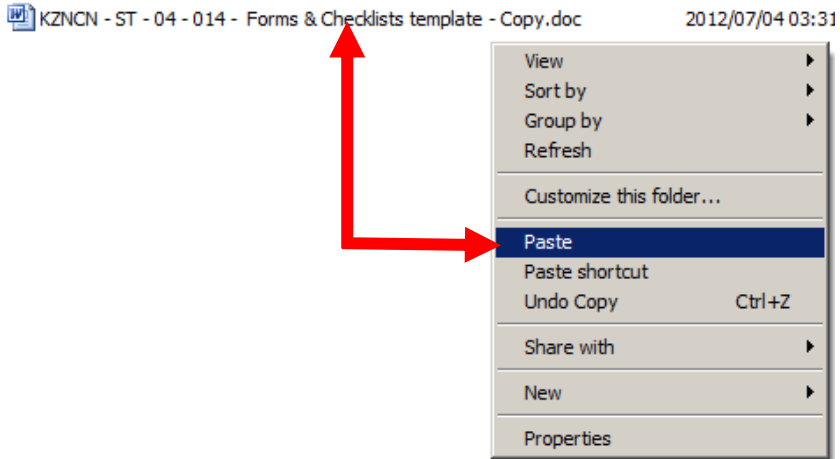
(Indicated in Figure 9)

Figure 9 notes:

Step 10:

To rename the document (KZNCN - ST - 04 – 014 - forms & checklist template - copy) "Right Click "on the KZNCN - ST - 04 – 014 - forms & checklist template - copy and select rename.
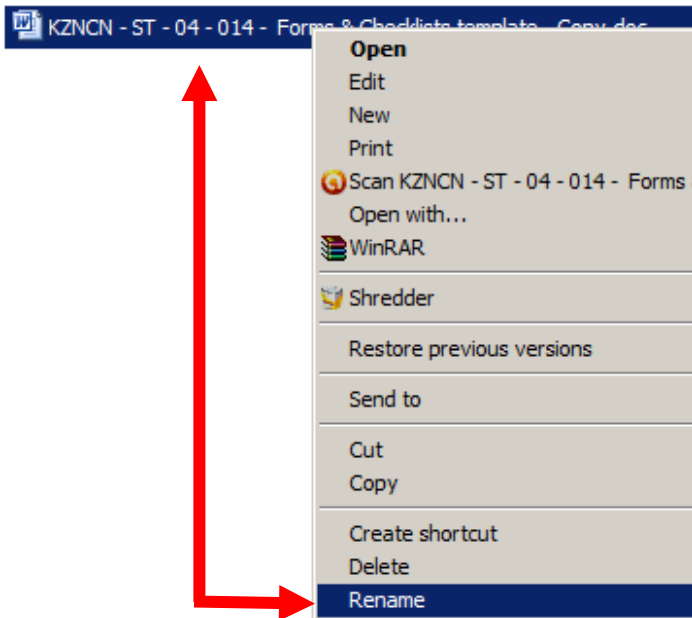
(Indicated in Figure 10)

Figure 10 notes:

HOW TO ADD OR CHANGE THE STANDARD FORMS AND OR CAMPUS MANAGEMENT SYSTEM

Step 11:

Now you can rename the document (KZNCN - ST - 04 – 014 - forms & checklist template - copy) to your document name (Note: follow the number sequence as this ensures document control described in the Document Control Procedure under the Quality Management System element of the Portal)
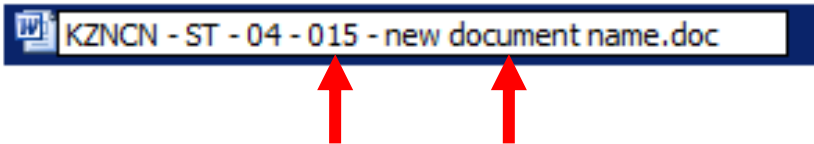
(Indicated in Figure 11)

Figure 11 notes:

Step 12:

Now that you have created your new document you need to link it into the QMS Portal Standard Forms & Checklist Index. Select the Index folder
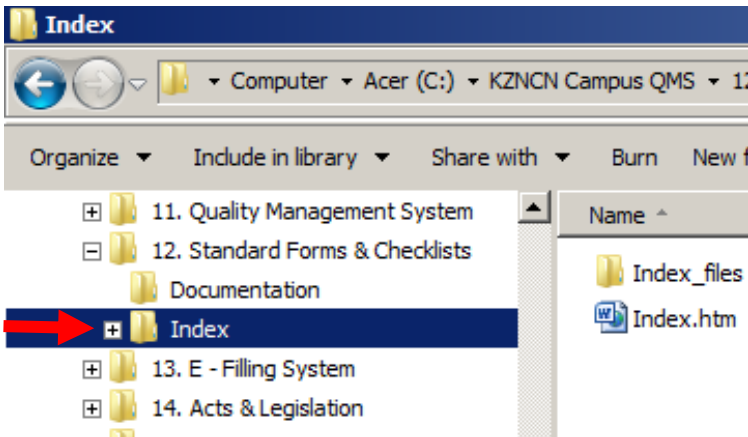
(Indicated in Figure 12)

Figure 12 notes:

Step 13:

"Right Click" on the "Contact info" document in the right hand window and select the "Open with Microsoft Word"
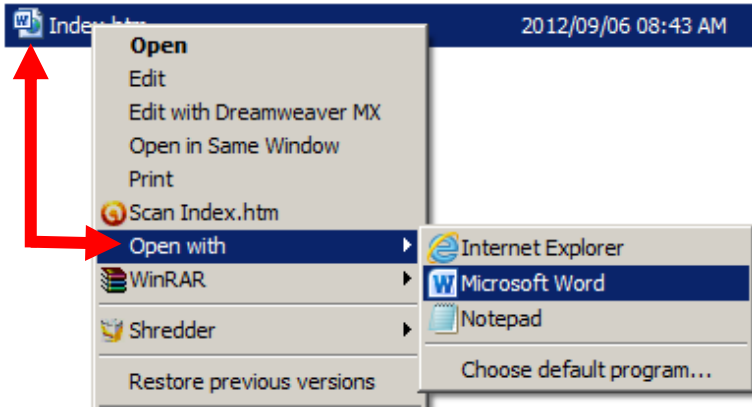
(Indicated in Figure 13)

Figure 13 notes:

_____

_____

_____

_____

_____

_____

Important Note: In older versions of Microsoft Windows you must select "Edit" or "Edit with Microsoft Word"

Step 14:

The Index page document will now open in "Microsoft Word". Please ensure that all the required field are completed and that the document that is going to be linked to the index contain the same information as the document name and number (This is for Document control purposes)

(Indicated in Figure 14)

Document Number	Document Name "Click below to access the document"	Signed master kept with :File Location / Name	Revision Status	Issue Date	Retention Period

Figure 14 notes:

_____

_____

_____

_____

_____

_____

Step 15:

Highlight the new document name and select "Hyperlink"
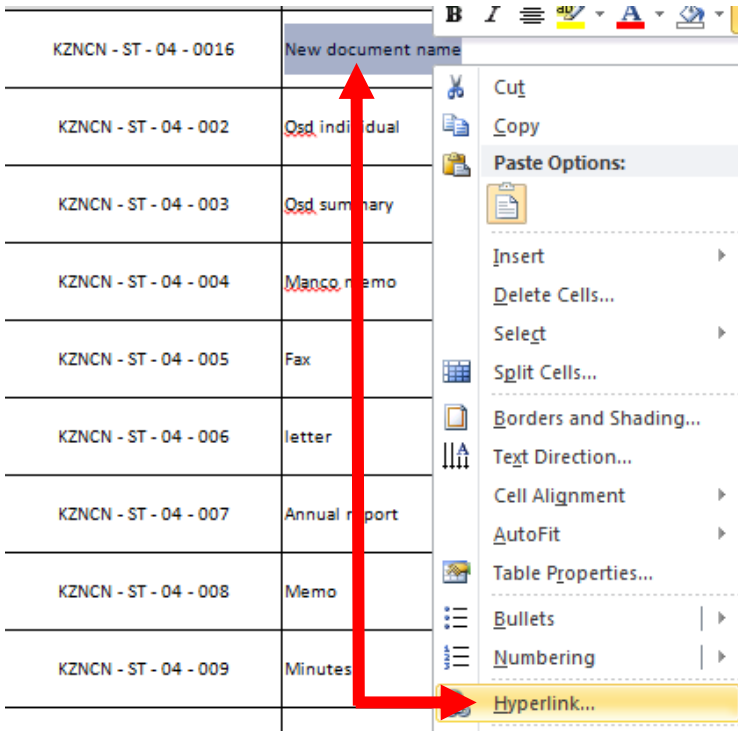
(Indicated in Figure 15)

Figure 15 notes:

Step 16:

The insert Hyperlink "Popup" will appear. Select the "Look in:" drop down box.
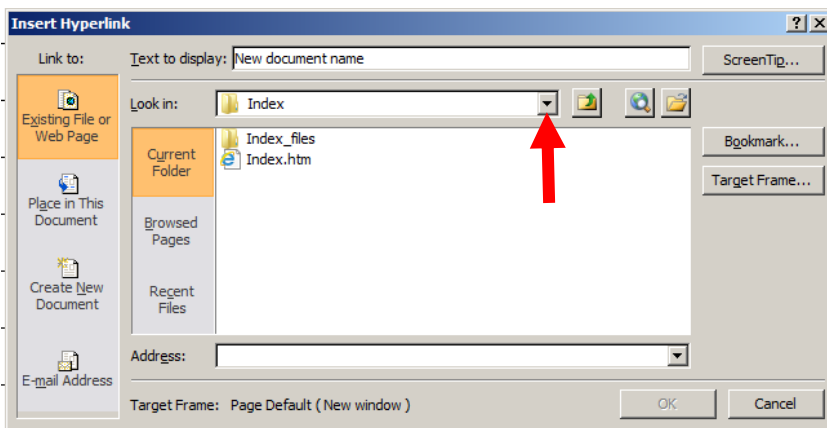
(Indicated in Figure 16)

Figure 16 notes:

HOW TO ADD OR CHANGE THE STANDARD FORMS AND OR CAMPUS MANAGEMENT SYSTEM

Step 17:

In the Look in: drop down box select the 12. Standard Forms & Checklist folder.
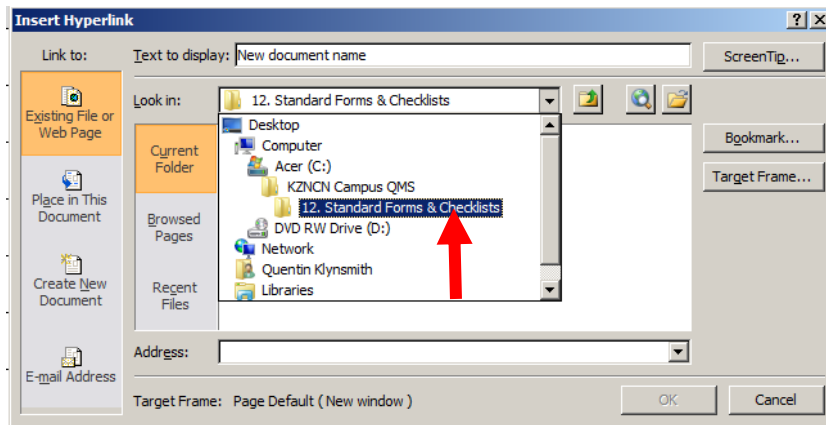
(Indicated in Figure 17)

Figure 17 notes:

Step 18:

Double "left click" on the Documentation folder
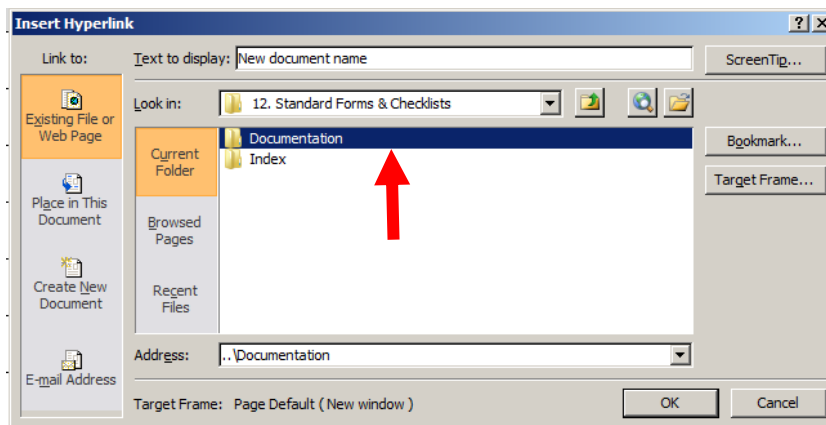
(Indicated in Figure 18)

Figure 18 notes:

HOW TO ADD OR CHANGE THE STANDARD FORMS AND OR CAMPUS MANAGEMENT SYSTEM

Step 19:

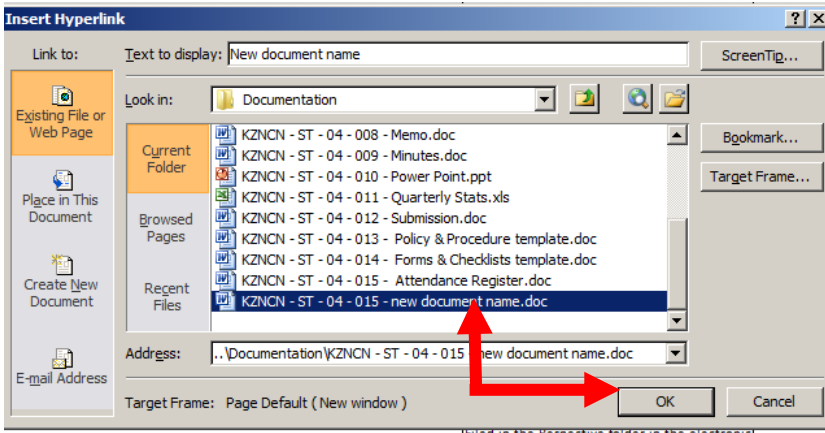Select the new created document and "click OK"

(Indicated in Figure 19)

Figure 19 notes:

Step 20:

The new document name will turn Blue and is now linked. You may change the color using Microsoft word. "Click" save and close Microsoft word.

(Indicated in Figure 20)

Figure 20 notes:

Important Note: You can now test the newly liked document through the QMS Portal.

HOW TO ADD OR CHANGE THE STANDARD FORMS AND OR CAMPUS MANAGEMENT SYSTEM

Step 21:

"Right Click" on the KZNCN Campus QMS folder in the left window and select properties.
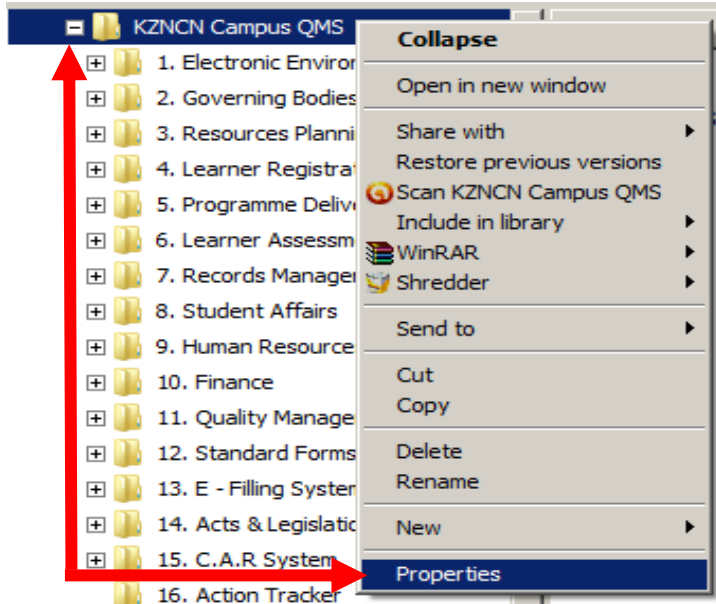
(Indicated in Figure 21)

Figure 21 notes:

_____

_____

_____

_____

_____

_____

_____

_____

_____

Step 22:

Ensure that the read only "Tick Box" is replaced so that the users cannot change the system or documentation, click apply changes to folder, subfolders and files.
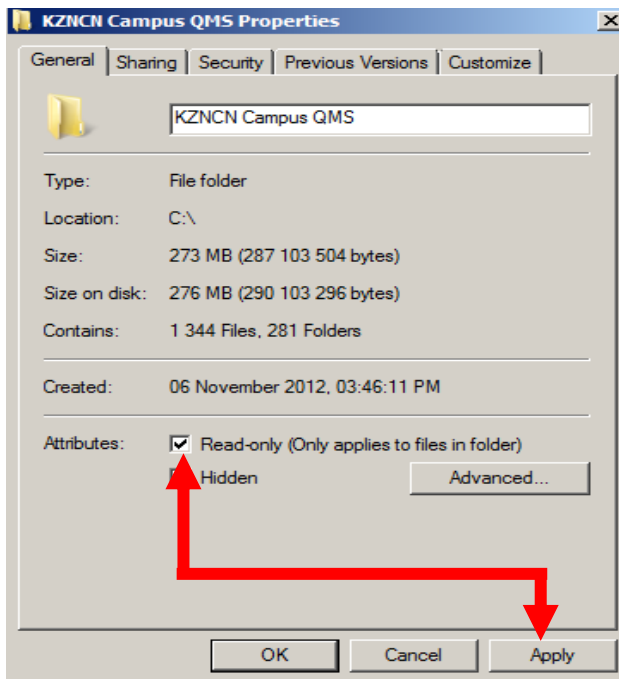
(Indicated in Figure 22)

Figure 22 notes:

_____

_____

_____

_____

_____

_____

_____

_____

Important Note: If you do not replace the "Read only" the users will have administration privileges to the system and will be able to make changes.