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)

<u>Step 1:</u>

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

| Figure | 1 notes: |
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| | |
| Properties | |
| Open Windows Explorer | |
| Start 🕐 🥲 🦼 🞹 HOW TO CHANGE THE I | |

<u>Step 2:</u>

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.

| 🕌 KZNCN Campus QMS | | Figure 2 notes: |
|---|--|-----------------|
| 🕞 🗢 📕 🔹 Computer 🔹 Acer (C:) 🔹 KZNC | CN Campus QMS 👻 | |
| Organize 🔻 Include in library 🔻 Share with | Burn New folder | |
| 🔶 🖬 🕌 KZNCN Campus QMS 📃 | Name * | |
| I. Electronic Environment I. Electronic Environment I. Governing Bodies I. Resources Planning I. Learner Registration I. Corregramme Delivery I. Cords Management I. Records Management I. S. Student Affairs | 1. Electronic Environment 2. Governing Bodies 3. Resources Planning 4. Learner Registration 5. Programme Delivery 6. Learner Assessments 7. Records Management | |

<u>Step 3:</u>

"Right Click" on the KZNCN Campus QMS folder in the left window and select properties.

(Indicated in Figure 3)

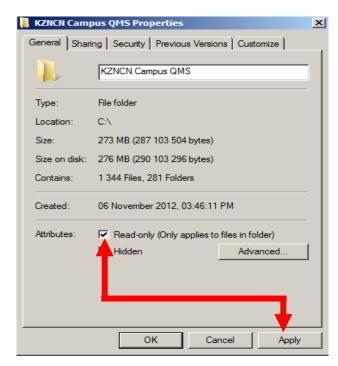


| Figure 3 notes: | | |
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<u>Step 4:</u>

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)

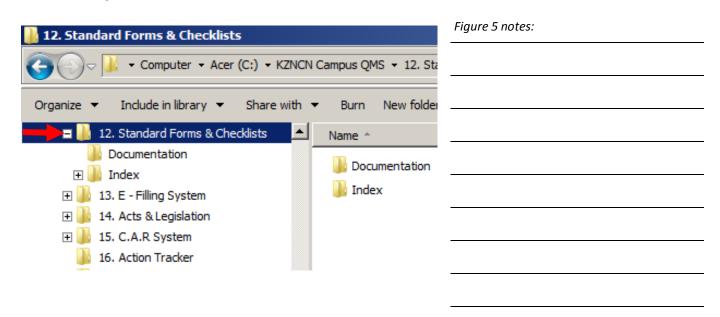


| Figure 4 notes: | | |
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Important Note: If you do not remove the "Read Only" you will not be able to save the changes you have made in the document going forward.

<u>Step 5:</u>

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



<u>Step 6:</u>

Navigate to the next Documentation folder and select.

(Indicated in Figure 6)

| 🕌 How to add a document into the QMS Portal | | Figure 6 notes: |
|---|------------------------|-----------------|
| G V - KZNCN | Campus QMS 👻 12. Stand | |
| Organize 🔻 Include in library 👻 Share with 🔻 | Burn New folder | |
| 🗉 鷆 11. Quality Management System 📃 | Name 🔶 | |
| 12. Standard Forms & Checklists Documentation | 🖷 KZNCN - ST - 04 - 0 | |
| E lindex | 🕙 KZNCN - ST - 04 - 0 | |
| 🕀 🌗 13. E - Filling System | 🐴 KZNCN - ST - 04 - 0 | |
| 🕀 🍌 14. Acts & Legislation | 🖳 KZNCN - ST - 04 - 0 | |
| 🕀 🍌 15. C.A.R System | 👜 KZNCN - ST - 04 - 0 | |
| 16. Action Tracker | 🖳 KZNCN - ST - 04 - 0 | |
| 🕀 📗 17. Training System | | |
| H H | KZNCN - ST - 04 - 0 | |

<u>Step 7:</u>

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

(Indicated in Figure 7)

| | 1 | Figure 7 notes: |
|--|--|--|
| Name * | Date modified | |
| 👜 KZNCN - ST - 04 - 001 - Agenda.doc | 2012/08/21 03:28 PM | |
| 🕮 KZNCN - ST - 04 - 002 - osdindividual.xls | 2012/05/07 11:57 AM | |
| 🕙 KZNCN - ST - 04 - 003 - osdsummary.xls | 2012/05/07 11:57 AM | |
| 👜 KZNCN - ST - 04 - 004 - Manco memo.doc | 2012/05/07 11:55 AM | |
| 👜 KZNCN - ST - 04 - 005 - Fax.doc | 2012/08/21 03:38 PM | |
| 👜 KZNCN - ST - 04 - 006 - letter.doc | 2012/08/21 03:40 PM | |
| \min KZNCN - ST - 04 - 007 - Annual report.doc | 2012/08/21 03:40 PM | |
| \min KZNCN - ST - 04 - 008 - Memo.doc | 2012/08/21 03:41 PM | |
| 🛃 KZNCN - ST - 04 - 009 - Minutes.doc | 2012/08/21 03:36 PM | |
| 🕮 KZNCN - ST - 04 - 010 - Power Point.ppt | 2012/05/07 11:56 AM | |
| 🕙 KZNCN - ST - 04 - 011 - Quarterly Stats.xls | 2012/03/22 09:03 AM | |
| KZNCN - ST - 04 - 012 - Submission.doc | 2012/08/21 03:37 PM | |
| KZNCN - ST - 04 - 013 - Policy & Procedure t Nortant note: The document (File), name musi KZNCN - ST - 04 - 014 - Forms & Checklists t | 2012/08/27 11:31 AM t remain the same othe 2012/07/04 03:31 PM | rwise the hyperlink will be lost from th |

main QMS Portal KZNCN - ST - 04 - 015 - Attendance Registe... 2012/09/06 08:42 AM 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)

| 🖷 KZNCN - ST - 04 - 014 - Forms & Cheo | klists template doc | Figure 8 notes: |
|--|---------------------------------|-----------------|
| KZNCN - ST - 04 - 013 - Policy Proce | Open | |
| KZNCN - ST - 04 - 012 - Submission.do | Edit | |
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| 📲 KZNCN - ST - 04 - 011 - Quarterly Stat | | |
| KZNCN - ST - 04 - 010 - Power Point.p | Scan KZNCN - ST - 04 - 014 - Fe | |
| | Open with | |
| | WinRAR | |
| 🖷 KZNCN - ST - 04 - 008 - Memo. loc | 💜 Shredder | |
| 🖷 KZNCN - ST - 04 - 007 - Annua report | | |
| KZNCN - ST - 04 - 006 - letter. oc | Restore previous versions | |
| | Send to | |
| 🖷 KZNCN - ST - 04 - 005 - Fax.dec | | |
| W KZNCN - ST - 04 - 004 - Manco memo. | Cut | |
| 🗐 KZNCN - ST - 04 - 003 - osdsummary | Сору | |
| KZNCN - ST - 04 - 002 - osdindividual. | Create shortcut | |

<u>Step 9:</u>

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)

| Copy.doc 2012 | /07/04 03:31 | Figure 9 notes: |
|---|--|--|
| View Sort by Group by Refresh Customize this folder | * * | |
| Paste | | |
| Paste shortcut Undo Copy | Ctrl+Z | |
| Share with | • | |
| New | • | |
| Properties | | |
| | View Sort by Group by Refresh Customize this folder Paste Paste shortcut Undo Copy Share with New | View Sort by Sort by Group by Refresh Customize this folder Paste Paste shortcut Undo Copy Ctrl+Z Share with New |

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)

| 🕎 KZNCN - ST - 04 - 014 - Fori | na & Chaddiata tamplata - Capy dac |
|--------------------------------|--------------------------------------|
| — | Open |
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| | Scan KZNCN - ST - 04 - 014 - Forms 8 |
| | Open with |
| | WinRAR |
| | 😏 Shredder |
| | Restore previous versions |
| | Send to |
| | Cut |
| | Сору |
| | Create shortcut |
| | Delete |
| | Rename |

Figure 10 notes:

<u>Step 11:</u>

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)

| KZNCN - ST - 04 - 015 - new document name.doc | |
|---|--|
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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

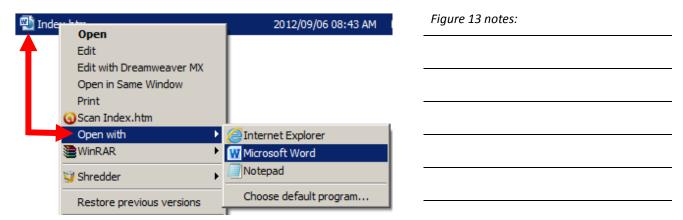
(Indicated in Figure 12)

| 📙 Index | | Figure 12 notes: |
|--|-----------------|------------------|
| Computer + Acer (C:) + KZNCN | Campus QMS 🝷 12 | |
| Organize 🔻 Include in library 👻 Share with 👻 | r Burn New f | |
| ■ 11. Quality Management System ■ 12. Standard Forms & Checklists ■ Documentation | Name ^ | |
| Index Index I3. E - Filling System I4. Acts & Legislation | 動 Index.htm | |

<u>Step 13:</u>

"Right Click" on the "Contact info" document in the right hand window and select the "Open with Microsoft Word"

(Indicated in Figure 13)



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)

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Figure 14 notes:

Step 15:

Highlight the new document name and select "Hyperlink"

(Indicated in Figure 15)

| | | | В | I 🚔 🌱 - 🗛 - | 🖄 × 📙 | Figure 15 notes: |
|------------------------|-------------------|-------|----------|----------------------|-------|------------------|
| KZNCN - ST - 04 - 0016 | New document name | | | | | |
| | | | * | Cu <u>t</u> | | |
| KZNCN - ST - 04 - 002 | <u>Qsd</u> indi | idual | | <u>С</u> ору | | |
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| | | | | Insert | Þ | |
| KZNCN - ST - 04 - 004 | Manco r | emo | | Delete Cells | | |
| | | | 1 | Sele <u>c</u> t | ► | |
| KZNCN - ST - 04 - 005 | Fax | | | S <u>p</u> lit Cells | | |
| KZNCN - ST - 04 - 005 | | | | Borders and Shading | J | |
| K2NCN - 31 - 04 - 008 | letter | | | Text Direction | | |
| K7N0N 07 04 007 | | | | Cell Alignment | ► | |
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| KZNCN - ST - 04 - 008 | Memo | | <u></u> | Table Properties | | |
| | | | := | <u>B</u> ullets | ► | |
| KZNCN - ST - 04 - 009 | Minutes | | 42 22 | <u>N</u> umbering | • | |
| | | | | <u>H</u> yperlink | | |

<u>Step 16:</u>

The insert Hyperlink "Popup" will appear. Select the "Look in:" drop down box.

(Indicated in Figure 16)

| | Insert Hyperlin | k | | | ? × | Figure 16 notes: |
|---|------------------------------------|----------------------------|-------------------------------|-------|--------------------------|------------------|
| 1 | Link to: | Text to displa | y: New document name | | ScreenTip | |
| - | Existing File or | Look in: | Index | 2 2 2 | | |
| - | Web Page | C <u>u</u> rrent Folder | Index_files ∂ Index.htm | | Bookmark Target Frame | |
| - | Pl <u>a</u> ce in This Document | Browsed Pages | | • | | |
| - | Create <u>N</u> ew Document | Re <u>c</u> ent Files | | | | |
| | E- <u>m</u> ail Address | Addr <u>e</u> ss: | | × | | |
| | | Target Frame | : Page Default (New window) | OK | Cancel | |
| | | | | | | |

<u>Step 17:</u>

In the Look in: drop down box select the 12. Standard Forms & Checklist folder.

(Indicated in Figure 17)

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|------------------------------------|-----------------------------------|--|------|-------------------|------------------|
| Insert Hyperlin | k | | | <u>? ×</u> | |
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| Existing File or Web Page | Look in: | 12. Standard Forms & Checklists Desktop Computer | Q 🖻 | B <u>o</u> okmark | |
| Pl <u>a</u> ce in This Document | Folder | Acer (C:) KZNCN Campus QMS 12. Standard Forms & Checklists | | Target Frame | |
| Create New | Pages | DVD RW Drive (D:) Network Quentin Klynsmith Libraries | | | |
| Document | Files | | | | |
| E- <u>m</u> ail Address | Addr <u>e</u> ss: Target Frame | : Page Default (New window) | OK | Cancel | |
| | | I. | | | |

Step 18:

Double "left click" on the Documentation folder

(Indicated in Figure 18)

| | | | | | | Figure 18 notes: |
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| | Insert Hyperlin | ik | | | ? × | |
| | Link to: | <u>T</u> ext to displ | ay: New document name | | ScreenTip | |
| • | Existing File or | Look in: | 12. Standard Forms & Checklists | 🔹 🖻 | | |
| | Web Page | | Documentation | | Bookmark | |
| | 1 | C <u>u</u> rrent Folder | Index | | Target Frame | |
| 1 | Place in This Document | Browsed | | | | |
| | bocament | Pages | | | | |
| 1 | Create New | Recent | | | | |
| | Document | Files | | | | |
| | E-mail Address | Address: | \Documentation | • | | |
| 1 | E-mail Address | | au Rada Dafault (Naw window) | OK | Cancel | |
| | | rarget Fram | e: Page Default (New window) | OK | | |

<u>Step 19:</u>

Select the new created document and "click OK"

(Indicated in Figure 19)

| | | | | Figure 19 notes: |
|-------------------------|-------------------|---|-------------------|------------------|
| nsert Hyperlin | ık | | <u>? ×</u> | |
| Link to: | Text to displ | ay: New document name | ScreenTi <u>p</u> | |
| Existing File or | Look in: | Documentation | | |
| Web Page | Current | KZNCN - ST - 04 - 008 - Memo.doc KZNCN - ST - 04 - 009 - Minutes.doc | Bookmark | |
| Place in This | Folder | KZNCN - ST - 04 - 010 - Power Point.ppt KZNCN - ST - 04 - 011 - Ouarterly Stats.xls | Target Frame | |
| Document | Browsed Pages | KZNCN - ST - 04 - 012 - Submission.doc KZNCN - ST - 04 - 013 - Policy & Procedure template.doc | | |
| Create New | Recent | KZNCN - ST - 04 - 014 - Forms & Checklists template.doc KZNCN - ST - 04 - 015 - Attendance Register.doc | | |
| Document | Files | KZNCN - ST - 04 - 015 - new documer't name.doc | | |
| | Addr <u>e</u> ss: | \Documentation\KZNCN - ST - 04 - 015 new document name.doc | | |
| E- <u>m</u> ail Address | Target Fram | e: Page Default (New window) | Cancel | |
| | | Ibiled in the Kernestive folder in the | | |

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)

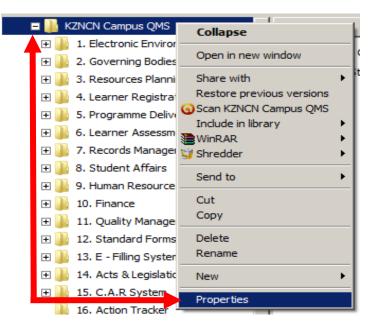
| | | Figure 20 notes: |
|------------------------|-------------------|------------------|
| Document Number | | |
| | | |
| KZNCN - ST - 04 - 0016 | New document name | |
| | | |
| | • | |

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

Step 21:

"Right Click" on the KZNCN Campus QMS folder in the left window and select properties.

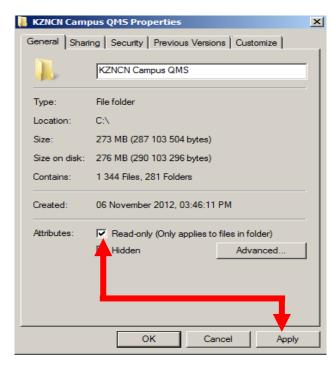
(Indicated in Figure 21)



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 not | es: | | |
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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.