

HOW TO LOAD THE CHANGE REQUEST INTO THE ACTION TRACKER

In this Training Manual you will be shown how to change the QMS & Quarterly Reports in the QMS Portal.

The action tracker tool will enable the campus to track the identified actions (example: root cause problems, non-conformances, corrective actions, process confirmation, etc.)

The action tracker tool is developed in a excel environment with a gauge functionality to track allocated actions.

The action tracker tracks the following:

- ❖ Actions per person open or closed
- ❖ Total Actions per process open or closed
- ❖ Total Action open or closed
- ❖ Action due dates

Benefits of the Action Tracker tool

- ❖ Tracking of actions raised
- ❖ Real time reporting on actions
- ❖ Analysis of employee performance against KPI
- ❖ Improve the management of business process (Corrective Actions, Non Conformances raised)

Step 1:

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

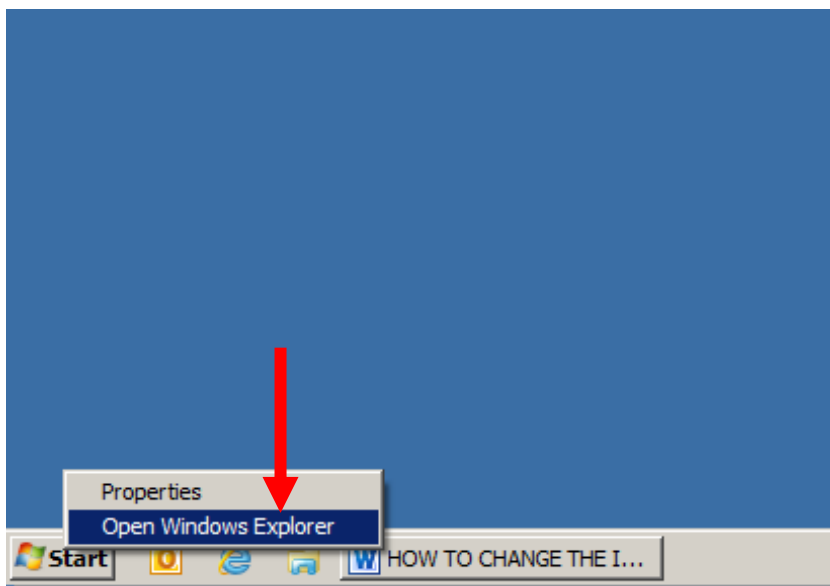


Figure 1 notes:

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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.

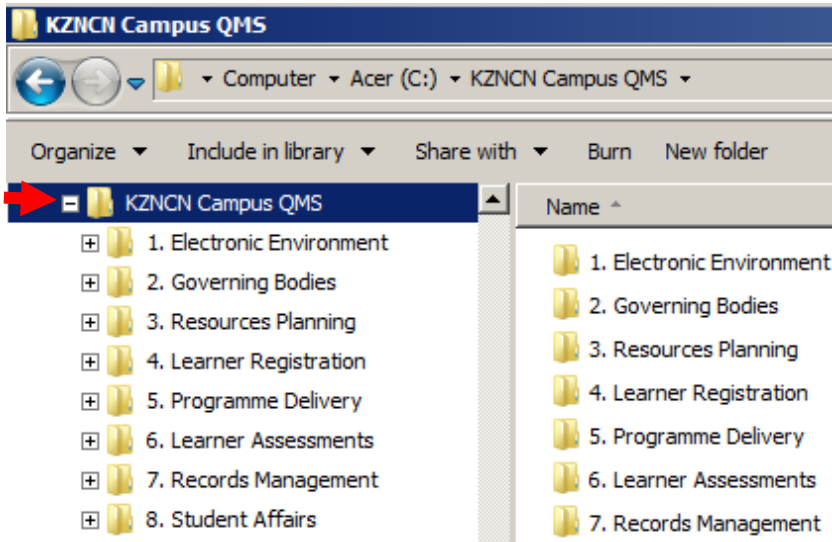


Figure 2 notes:

Step 3:

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

(Indicated in Figure 3)

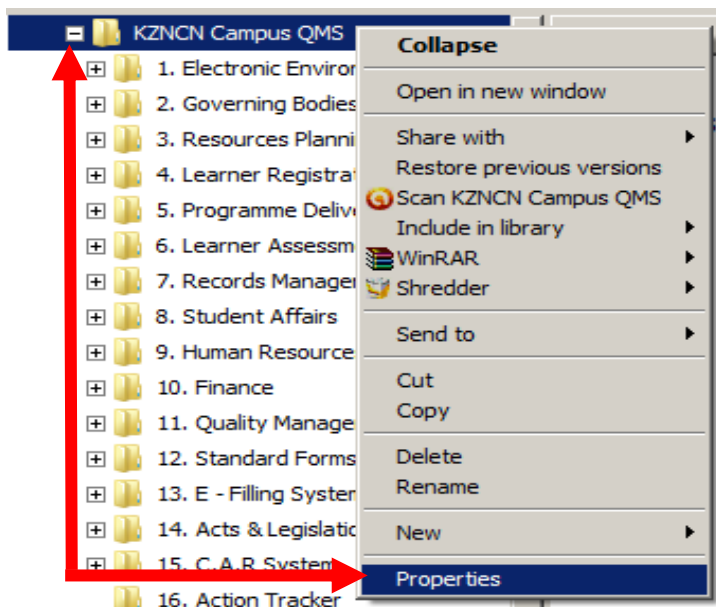


Figure 3 notes:

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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)

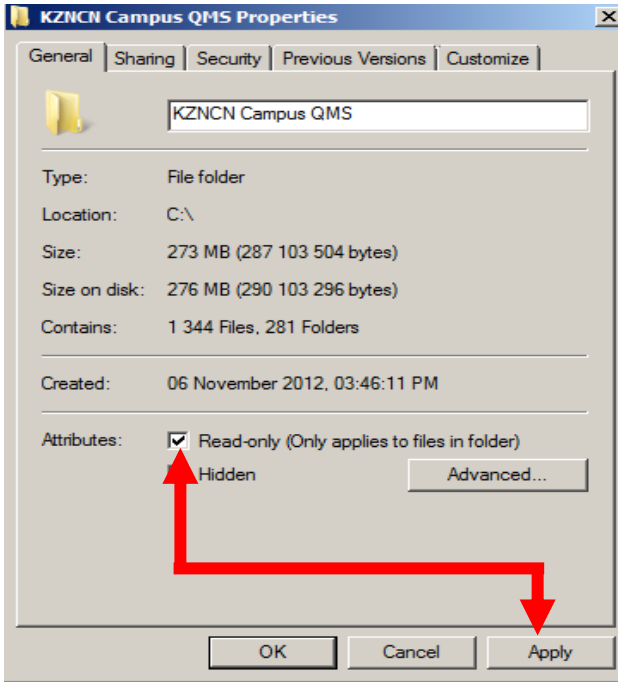


Figure 4 notes:

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 16. Action Tracker folder.

(Indicated in Figure 5)

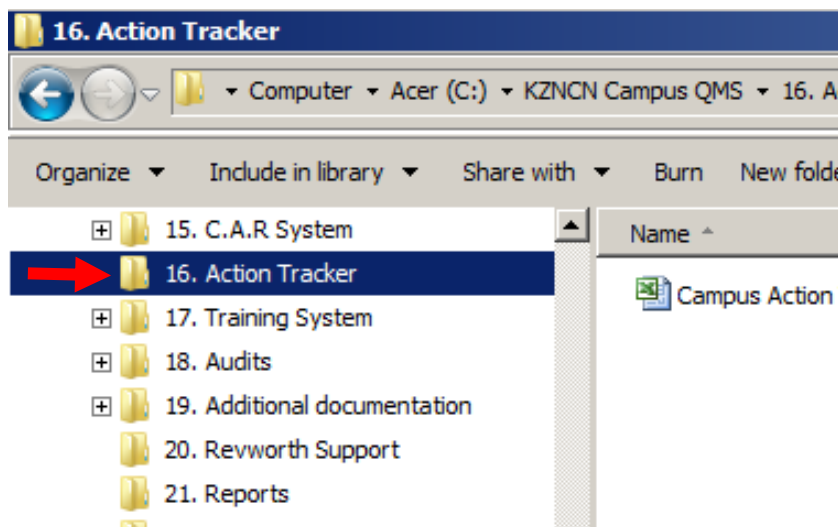


Figure 5 notes:

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Step 6:

On the left screen (window) you will find the Action Tracker (Microsoft Excel Document). “Double Click” to open. (Indicated in Figure 6)

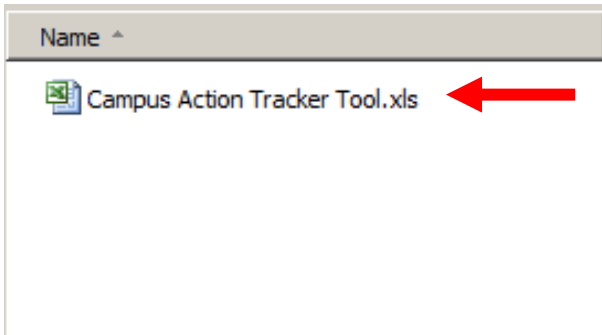


Figure 6 notes:

Step 7:

The Action Tracker will now open. If this is the first time that the action tracker is opened the first page must be completed

(Indicated in Figure 7)

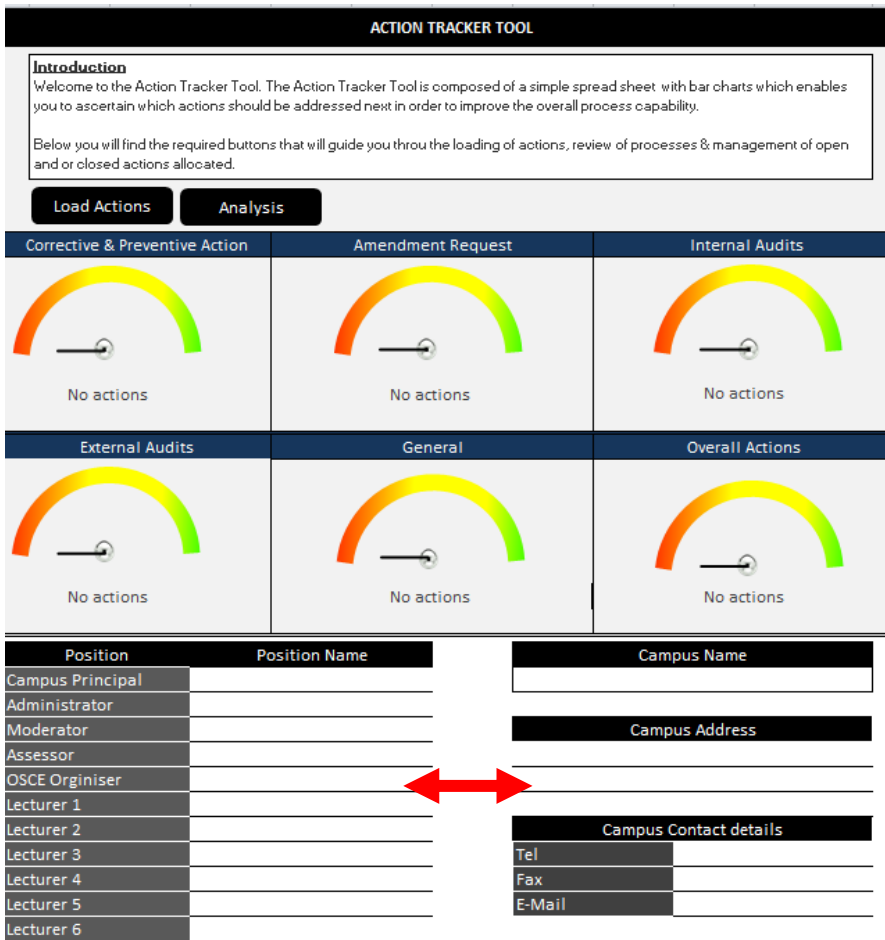


Figure 7 notes:

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Step 8:

To load an action “click” on the Load actions button
 (Indicated in Figure 8)

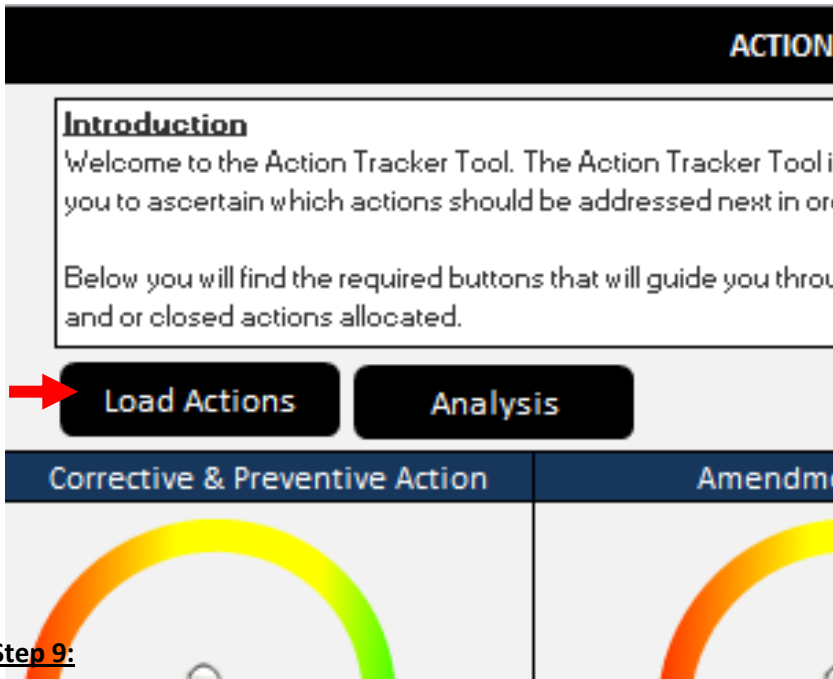


Figure 8 notes:

Step 9:

Complete the fields as per the submitted Change or CAR request.
 (Indicated in Figure 9)

Category	Campus Management System	Sub Category	Action To	Opened BY	Date Raised	Due Date	Color	Open / Closed	Document Number	Action description
Corrective & Preventive Action	Governing Bodies	Incorrect documentation used	Administrator	Campus Principal	15-Nov-12	16-Nov-12	1	Open	1-Jan-00	Insert description

Figure 9 notes:

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Step 10:

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

(Indicated in Figure 10)

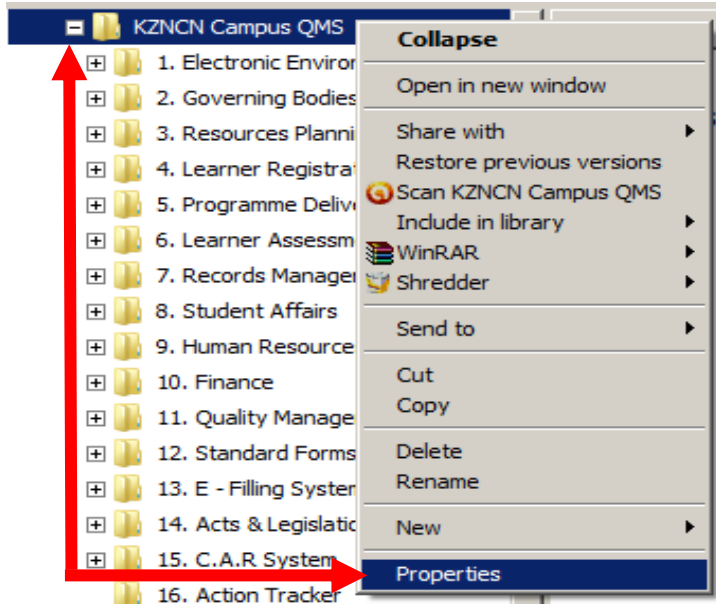


Figure 10 notes:

Step 11:

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 11)

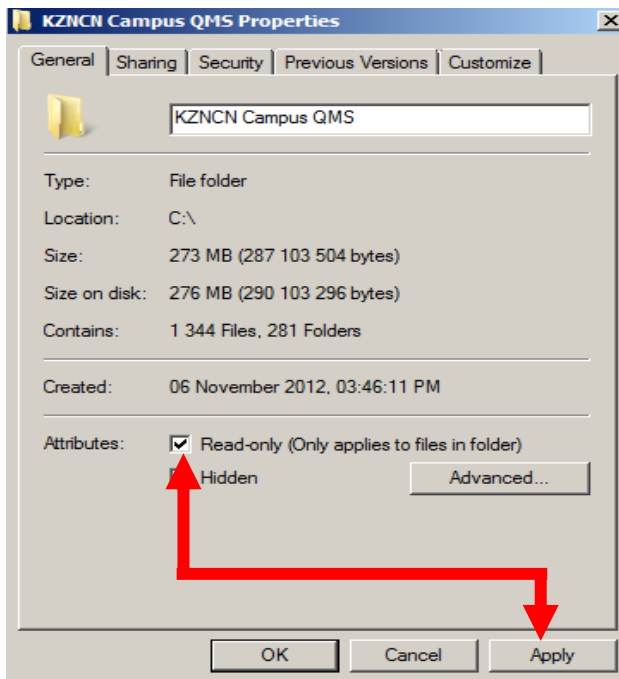


Figure 11 notes:

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.