

QualityHelper

About

Quality Helper is a quality management tool useful for document management and process/procedure management within a quality management system. It operates online and offline. It allows you to take your standard operating procedure documents and instructions with you anywhere.

If you are not installing or entering data see [End Use](#) for more information.

QualityHelper is a project maintained courtesy of **Innovation Foundry**.

Please go to <http://www.foundin.com.au/> for more information.

Theory

Introduction

The idea behind this software was to make a quality management tool that was easy for staff to use.

It was assumed that instructions should be communicated via flow-charts as they are easy for everyone to understand.

Instructions also need associated reference materials. So documents have to be associated with respective flowchart elements/procedures.

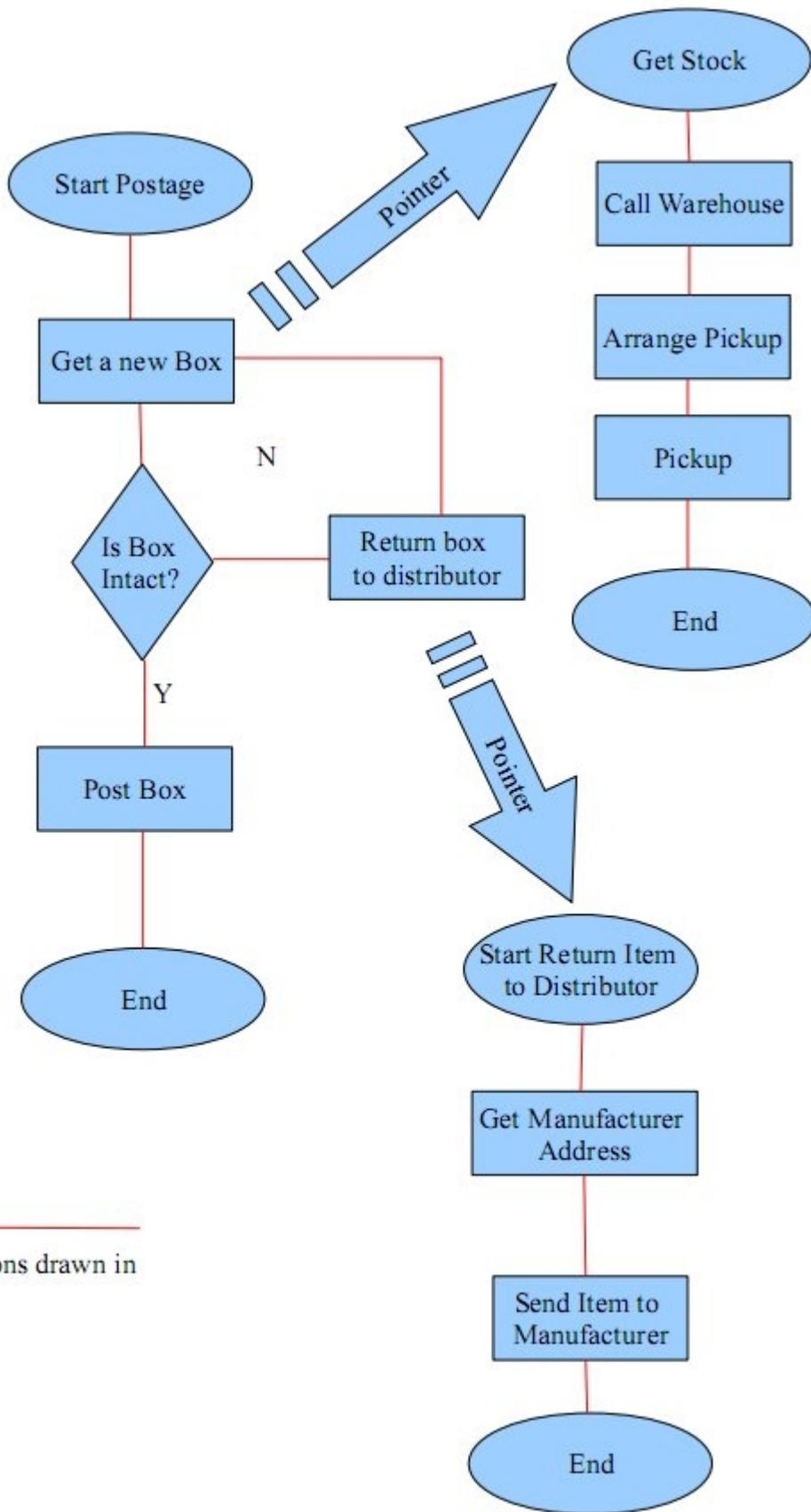
Where possible, we should be able to re-use instructions (if they are the same). So we need to be able to connect flowcharts together so that we can re-use one or more of them. From this it was determined that a procedure could then point to another via a *pointer*. See below.

We can distinguish intra-diagram connected items (in red) from inter-diagram connected items (shown as "Pointer" arrow).

This enables the re-use of "Get Stock" in another diagram.

Visually however, we'd like to traverse these diagrams easily, while managing the procedures' documents and properties easily for each element which led us to designing the [End User](#) interface.

The software can be taken offline and still used. The software caches all diagram information and associated documents.



Installation

Locate the SQL directory from the QualityHelperService repository (qhs).



Find QualityHelperDB.sql and execute it in your running database.

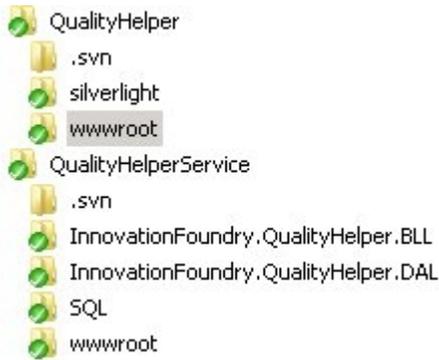


Ensure that the tables have successfully loaded in your database by noting the new tables prefixed with IF_ (as shown below)

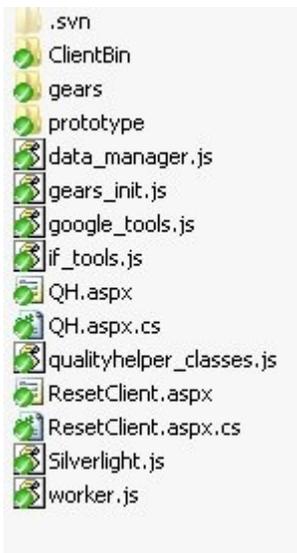
- + [table icon] dbo.DNN_UsersOnline
- + [table icon] dbo.DNN_VendorClassification
- + [table icon] dbo.DNN_Vendors
- + [table icon] dbo.DNN_Version
- + [table icon] dbo.IF_AuditActionType
- + [table icon] dbo.IF_AuditInfo
- + [table icon] dbo.IF_ConnectionType
- + [table icon] dbo.IF_Connects
- + [table icon] dbo.IF_Document
- + [table icon] dbo.IF_Document_Cache
- + [table icon] dbo.IF_DocumentType
- + [table icon] dbo.IF_File
- + [table icon] dbo.IF_FlowchartElement
- + [table icon] dbo.IF_Group
- + [table icon] dbo.IF_GroupHierarchy
- + [table icon] dbo.IF_MimeExtensions
- + [table icon] dbo.IF_MimeType
- + [table icon] dbo.IF_Participants
- + [table icon] dbo.IF_Policy
- + [table icon] dbo.IF_PolicyHierarchy
- + [table icon] dbo.IF_Procedure
- + [table icon] dbo.IF_ProcedureAliases
- + [table icon] dbo.IF_ProcedureCompliance
- + [table icon] dbo.IF_ProcedureDocuments
- + [table icon] dbo.IF_ProcedureGroup
- + [table icon] dbo.IF_Purpose
- + [table icon] dbo.IF_References
- + [table icon] dbo.IF_System
- + [table icon] dbo.IF_SystemPolicy
- + [table icon] dbo.IF_TranslateTable
- + [table icon] dbo.IF_User
- + [folder icon] Views

Locate the wwwroot directory of QualityHelper (highlighted), then copy all files to the wwwroot directory of your DotNetNuke installation.

Copy all the DLL files from all child directories of the repository to the wwwroot/bin directory of your DotNetNuke installation.



The files to copy should be like the following.



Locate the wwwroot directory of QualityHelperService (highlighted), then copy all files to the wwwroot directory of your DotNetNuke installation.

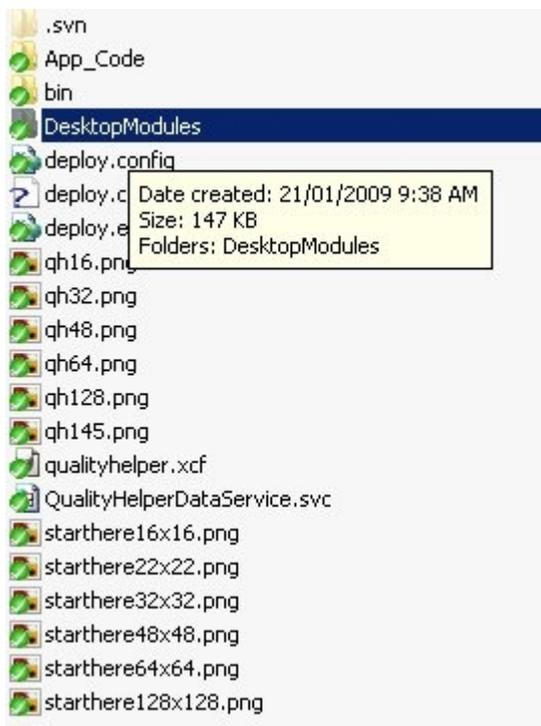
Copy all the DLL files from all child directories of the repository to the wwwroot/bin directory of your DotNetNuke installation.



The files to copy should be like the following.

Make sure the DesktopModules are copied correctly into the DotNetNuke DesktopModules Directory.

Make any additions to your web.config file that are necessary. We include a deploy.config file to assist you in isolating required changes.



Finally add the module from your DNN host account to activate the module.

Add the module to a page, and ensure edit privileges are given to users required to add/edit documents, procedures etc.

Prerequisites

- Windows Server IIS
- SQL Server Instance
- DotNetNuke 4.x +

Data Entry

Overview

The program facilitates the connection of procedures to other procedures and documents.

See [Theory](#) for a description of how this software is intended to work.

Fundamentally the most important objects for constructing usable flow diagrams (with connected documents and other procedures) are:

[Documents](#)

[Procedures](#)

General Options

Filters

It is possible to run filters on data by entering the required predicate in the text box above where the data resides (where possible).

For example, below, we can filter the items beginning with "Ho". This allows us to find and work on our data as quickly as possible.

Procedure

	Procedure Id	Procedure
	<input type="text" value="Ho"/>	
<input type="checkbox"/>	Hosting Data	Hosting Da
<input type="checkbox"/>	Hosting Email	Hosting En
<input type="checkbox"/>	Hosting Star	Hosting St
<input type="checkbox"/>	Hosting Web	Hosting W

Local Caching

It is possible to work on data without having to do whole page refreshes. This is achievable by ticking the "Don't Force Refresh" box.

If you edit data that requires a refresh, hit the "Refresh Data" button. This can occur for dependent data, i.e. you may add a new document to the list, but won't necessarily see it in the Procedure Documents drop down until you refresh the page.

QualityHelper Admin

Don't Force Refresh

Documents

Introduction

The documents you add are downloaded by clients. The text (where possible) is indexed for their searches.

Only the latest document is downloaded by the clients. The older versions are never deleted.

Listing Documents

To list the documents in your collection, and see their properties, click on the "Document" tab.

Click on the small "+" sign to expand the document properties. Below you can see that Document 34 ("qh demo") is currently associated with procedure "Administration". How did we do that? Read on.

Document Type	Document	Procedure	Connectic
Document			
Document Id	Document Name	Document Description	
⊕	33	cvxcv	xcvcv xcv xcvxc vxcv
⊖	34	qh demo	test pic

Document Procedures	Document Versions
Procedure Id	
Administration	

Adding/Updating a document

Click on "New" on one of the document rows.

Document Name is the name of the document (human readable is better here).

Document Description is the long description (few sentences) about the document.

You can either enter an external URL (ie <http://docs.google.com/blah.pdf>) or upload your own file.

Image URL is a thumbnail that can be used to identify the document (ie <http://docs.google.com/test32.gif>)

Click on "Update" to confirm insertion of your document. This is also the same for updating documents.

Document

Document Id	Document Name	Document Description
<input type="text"/>	<input type="text"/>	<input type="text"/>

Document Name

Document Description

Download Remote File (Url)

Upload Local File

Image Url

Checking the Document

Once you have inserted/updated your document. Click on "Open" (highlighted in pink). To check your document. You can also expand the document and view its version history.

Document

	Document Id	Document Name	Document Description	Origin Url	Image Url	Deleted	Cached	Op
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
⊖	33	cvxcv	xcvcv xcv xcvxc vxcv	file:///@192.168.1.248/qhdemo.jpg		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Op

Document Procedures Document Versions

Document Version	Is Valid	Date Updated	Open
0	<input checked="" type="checkbox"/>	6/15/2009	<input type="button" value="Open"/>



Associating a document with a procedure

Once the document has been uploaded. It can be associated with a procedure.

- Expand the procedure you'd like to add the document to.

- Select the document you'd like
- Click on Update

The following figures demonstrate this.

Document Type | Document | Procedure | Connection Type | Group | Purpose

Procedure

Procedure Id	Procedure Name	Procedure Description	Purpose Name	#
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Start"/>	<input type="text"/>
<input checked="" type="checkbox"/> Administration	Administration	Administration	Start	Edit New Delete

Aliases | Groups | Connections In | Connections Out | Pointers In | Pointers Out | Documents

Document Id	Document Name	#
<input type="text"/>	<input type="text"/>	<input type="text"/>

Document Id	Document Name	#
<input type="text"/>	<input type="text"/>	<input type="text"/>

Document Id

Document Id	Document Name	#
34	qh demo	New Delete

Now your document has been associated!

To check:

- go back to the documents tab and click the green "Document".
- expand the document you associated with the last procedure
- click on the "Document Procedures" tab, and you should see the resulting association.

Document Type	Document	Procedure	Connectic
Document			
Document Id	Document Name	Document Description	
⊕ 33	cvxcv	xcvcv xcv xcvc xvcv	
⊖ 34	qh demo	test pic	

Document Procedures
Document Versions

Procedure Id
Administration

Procedures

Introduction

Procedures describe your flowcharts.

Any procedure that is *connected* to another is on the same flowchart.

Any procedure that *points* to another is on a different flowchart.

Aliases help us find procedures, by giving them different names.

Groups define who is to do what procedure.

Documents are the information we'd like associated with a procedure. (Ie. Instruction Manual for xxxx.pdf)

You can edit the properties of a procedure by:

- expanding the "+" sign at the beginning of a procedure row you are interested in
- and then click on the property tab you are interested in
- use the "New", "Delete", "Update" links where possible to change the properties.

Document Type	Document	Procedure	Connection Type	Group	Purpose																	
Procedure																						
	Procedure Id	Procedure Name	Procedure Description	Purpose Name	#																	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																	
<input type="checkbox"/>	Administration	Administration	Administration	Start	Edit New Delete																	
<table border="1"> <thead> <tr> <th>Aliases</th> <th>Groups</th> <th>Connections In</th> <th>Connections Out</th> <th>Pointers In</th> <th>Pointers Out</th> <th>Documents</th> </tr> </thead> <tbody> <tr> <td colspan="2"> <table border="1"> <thead> <tr> <th>Group Name</th> <th>#</th> </tr> </thead> <tbody> <tr> <td>Management</td> <td>New Delete</td> </tr> </tbody> </table> </td> <td colspan="4"></td> </tr> </tbody> </table>						Aliases	Groups	Connections In	Connections Out	Pointers In	Pointers Out	Documents	<table border="1"> <thead> <tr> <th>Group Name</th> <th>#</th> </tr> </thead> <tbody> <tr> <td>Management</td> <td>New Delete</td> </tr> </tbody> </table>		Group Name	#	Management	New Delete				
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Group Name	#																					
Management	New Delete																					
<input type="checkbox"/>	Delegate Work	Delegate Work	Delegate work to staff for the day and ensure business requirements are being kept.	Procedure	Edit New Delete																	
<input type="checkbox"/>	End Quaterly Super	Finish Super	Finish of the quaterly super payment details.	End	Edit New Delete																	
<input type="checkbox"/>	Event Audit	Event Audit	Ensure administration tasks are audited daily.	Procedure	Edit New Delete																	
<input type="checkbox"/>	Hire Personnel	Hire Personnel	Approve and hire personnel	Response	Edit New Delete																	
<input type="checkbox"/>	Hosting Data	Hosting Data	Describes data hosting.	Start	Edit New Delete																	
<input type="checkbox"/>	Hosting Email	Hosting Email	Hosting Email, Calendar, Notes, and SMTP services	Start	Edit New Delete																	
<input type="checkbox"/>	Hosting Star	Hosting Star	This is Hosting Star's procedures.	Start	Edit New Delete																	
<input type="checkbox"/>	Hostina Web	Hostina Web	Hosting web sites, applications & ...	Start	Edit New Delete																	

Connections

Introduction

Connections determine how a flowchart is put together by *connecting* different procedures.

Connections can go out or in.

Connections have [Connection Types](#).

Setting up a connection requires more than one procedure.

Editing Connections

- Go to the "[Procedure](#)" top tab.
- Open a procedure you are interested in.
- Expand the procedure.
- Go to either the "Connections In" or "Connections Out" tab.

- You can view/edit the connections as required.

Procedure

Procedure Id	Procedure Name	Proce
Administration	Administration	Admir

Aliases	Groups	Connections In	
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Procedure Origin	Connection Type	#
New No data to display		

Procedure

Procedure Id	Procedure Name	Procedure Description
Administration	Administration	Administration

Aliases	Groups	Connections In	Connections Out	
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Procedure Destination	Connection Type	#
Event Audit		New Delete

Connection Types

Introduction

Connection Types determine how the procedures are connected together on the same diagram, these are typically drawn as a line. You can add a line color and description, so that it can be presented on the diagram.

Connection Type

Connection Type	Colour RGB Hex #	Colour View	#
Connection Type	MAYBE	Colour RGB Hex #	
	000000		
N	FF0000		
Y	00FF00		



Aliases

Introduction

Aliases allow us to reference the same procedure with a different name. The aliases especially help searching times.

Editing Connections

- Go to the "Procedure" top tab.
- Open a procedure you are interested in.
- Expand the procedure.
- Go to either the "Aliases" tab.

Procedure

Procedure Id	Procedu
Administration	Administ

Aliases | Groups | Co

Alias	#
New No data to display	

Document Types

Introduction

Document types and their content types etc can be added to help improve the interface relevance to the end user. This is particularly for clients with access to the internet. This is not particularly useful in intranet only installations. Future

versions using this information more is to be expected.

Document Type	Document	Procedure	Connection Type	Group	Purpose
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Document Type

Document Type	Image Url	#
<input type="text"/>	<input type="text"/>	
Audio		Edit New Delete
PDF		Edit New Delete
Picture		Edit New Delete
Text		Edit New Delete
Unknown		Edit New Delete
URL		Edit New Delete
Video		Edit New Delete

Content Type

Mime Type	Document Type	#
<input type="text"/>	<input type="text"/>	
text/html	Text	Edit New Delete

Extension Type

Document Extension	Mime Type	#
<input type="text"/>	<input type="text"/>	
txt	text/html	Edit New Delete

Groups

Introduction

Groups show us who should implement a procedure.

Editing Procedure Groups

- Go to the "[Procedure](#)" top tab.
- Open a procedure you are interested in.
- Expand the procedure.
- Go to the "Groups" tab.

Procedure

Procedure Id	Procedure Name
<input type="text"/>	<input type="text"/>
Administration	Administration

Aliases Groups Connection

Group Name	#
Management	New Delete

Editing Groups

- Go to the "Group" top tab.
- Use the Edit/New/Delete links as required.

Document Type	Document	Procedure	Connection Type	Group
---------------	----------	-----------	-----------------	-------

Group

Group Name	#
<input type="text"/>	
Administration	Edit New Delete
Client	Edit New Delete
I.T. Staff	Edit New Delete
Management	Edit New Delete
Partners	Edit New Delete
Technicians	Edit New Delete

Purpose

Editing Procedure Purpose

- Go to the "[Procedure](#)" top tab.
- Open a procedure you are interested in.
- Insert/Edit the procedure.
- Select the purpose

Editing Purpose

- Go to the "Purpose" top tab.
- Use the Edit/New/Delete links as required.
- Flowchart elements are those supported for use in diagrams at this stage.

Purpose

Purpose Name	Flowchart Element	#
<input type="text"/>	<input type="text" value=""/>	
End	BoxRound	Edit New Delete
General	BoxSquare	Edit New Delete
Procedure	BoxSquare	Edit New Delete
Question	Diamond	Edit New Delete
Response	BoxSquare	Edit New Delete
Start	BoxRound	Edit New Delete

End Use

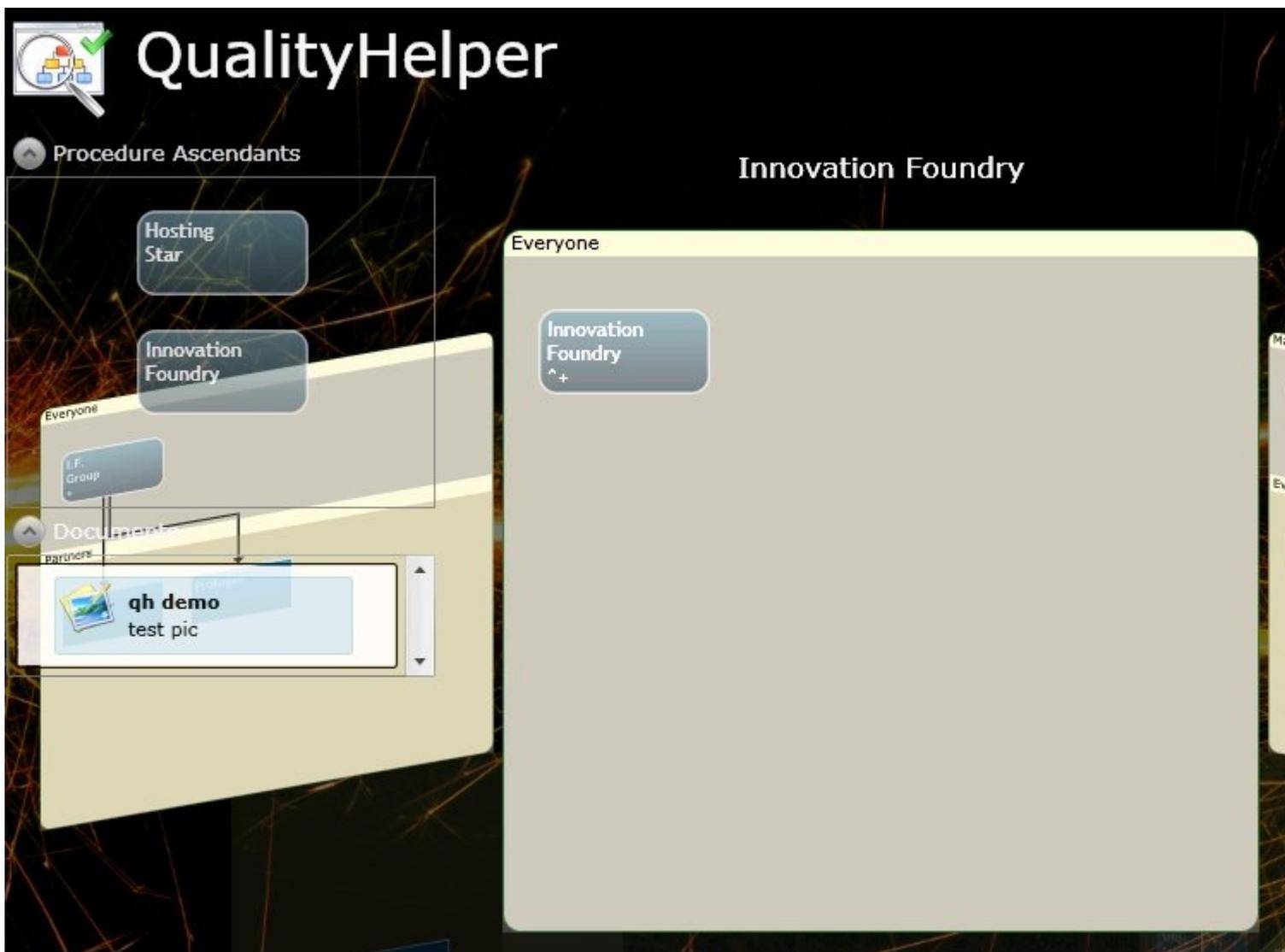
Prerequisites

You will need the following to run the software:

- Internet Browser
 - Capable of running Microsoft Silverlight
 - Capable of running Google Gears
 - Rights to install and run the Browser and associated software
- Internet Connection
 - Capable of downloading Microsoft Silverlight
 - Capable of downloading Google Gears

Introduction

End users will see an interface similar to the following:



Clicking on an element once will show its properties & documents. Rolling over an element will give you a short description.

Expanding, Contracting and Moving The Window Dialogs

To expand or contract a window dialog, click on the arrow once.

To move a window, select the window title and drag.

Going back Home

To get to the "home" procedure, click on the top left image or application title, in this case "QualityHelper".

Downloading a document

Click on a document in the "Documents" list. The "qh demo, test pic" with an image icon is visible above.

Search

Enter a search term and click tab or enter to see your results.

Navigating the Ascendant and Descendant windows

If you see the Ascendant or Descendant windows expand with diagram elements, you can click on them to view the diagram it is in. If the diagrams disappear (or show no entries) it means the element you last clicked has no children or parent items.

Expanding Parent and Child Diagrams

Any flowchart element that has a "^" has parent (Ascendants) procedures/diagrams.

Any flowchart element that has a "+" has child (Descendants) procedures/diagrams.

Click an element twice to see its children or parents. By default, the first child and parent found are expanded.



Focus on a diagram

Clicking on a diagram will bring it to the center. The diagram to the left is a parent. The diagram to the right is a child.