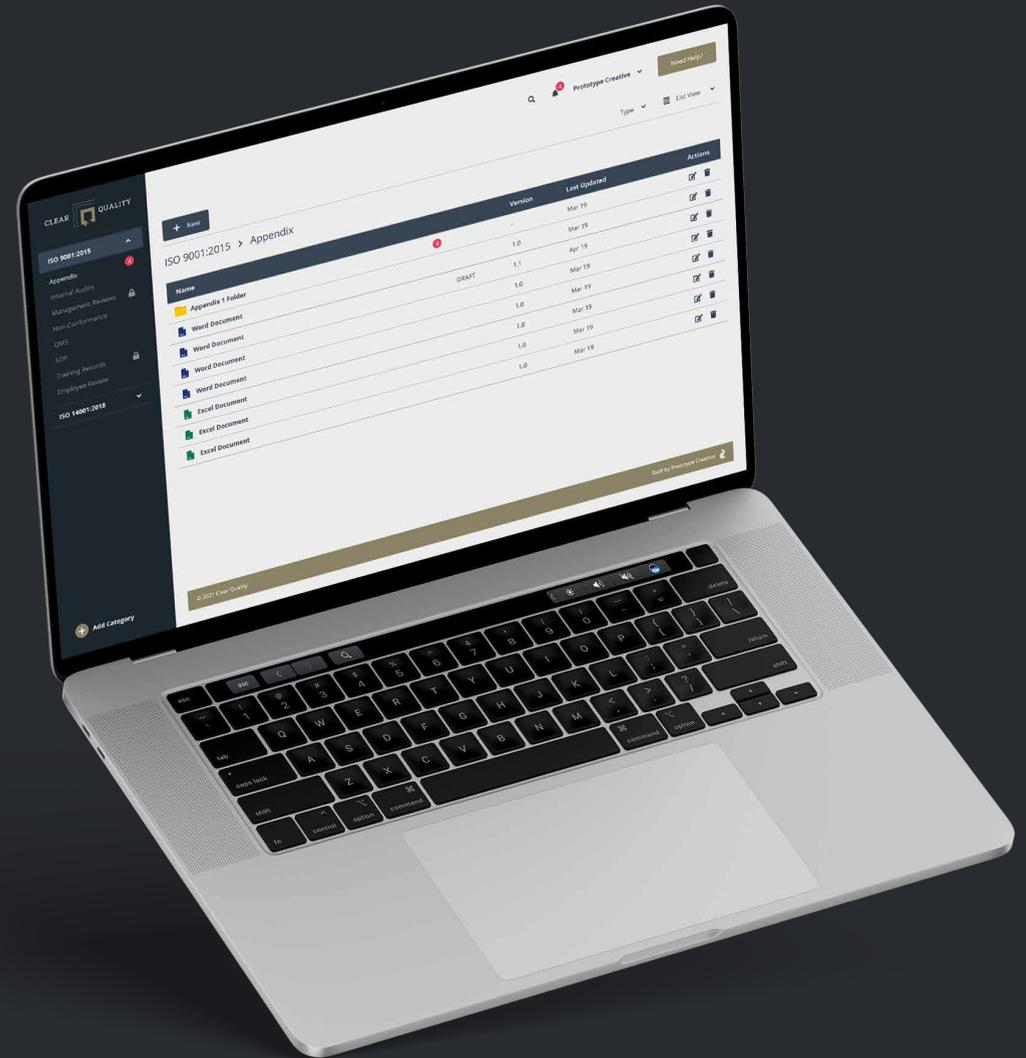




YMS

USER GUIDE

www.clearquality.co.uk



MEMBER LOG IN

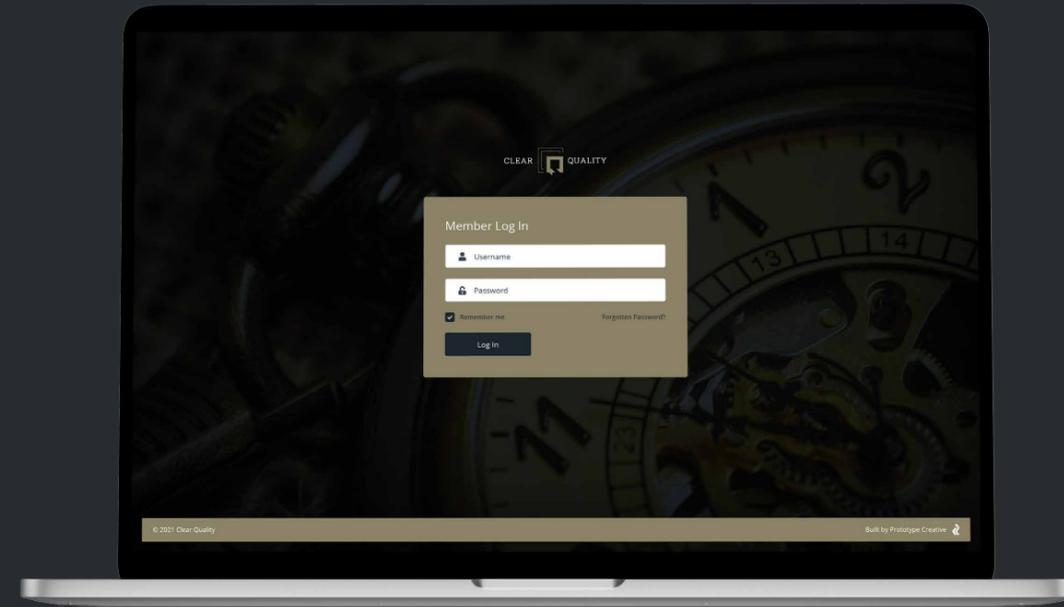
To begin, Please visit

YMS.CLEARQUALITY.CO.UK

When you first visit yms.clearquality.co.uk you'll see the following screen.

Please log in to your account by using the username and password you were provided with.

If you've forgotten your password, please click the [Forgotten Password](#) button and follow the instructions to re-set your password.



USER DASHBOARD

Once logged in you'll see the user dashboard area.

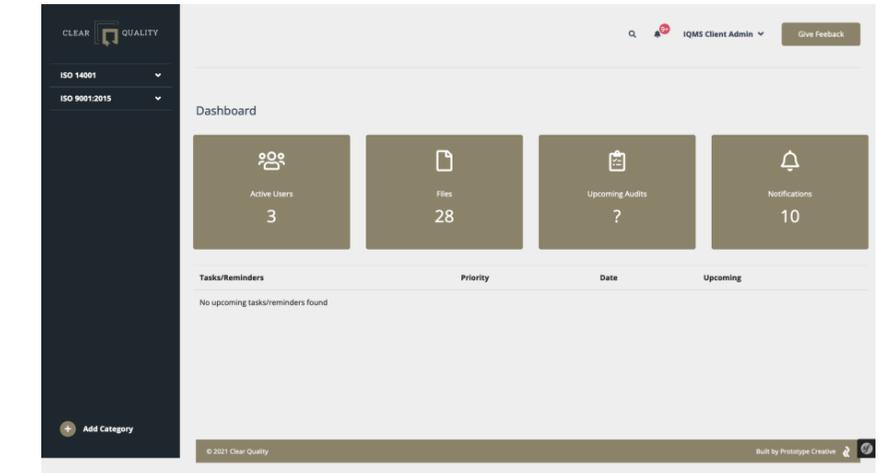
The dashboard is split into two areas, the main content area in white, and the dark blue side navigation menu.

From the side navigation menu you can:

- View, edit & add ISO categories

From the main content area you can:

- View/edit users
- View/edit files
- View/edit upcoming audits
- View notifications
- Search
- Give feedback



Main Dashboard View

ADD USERS

To add a new user, please click the "Active Users" button.



This will open the user's page.

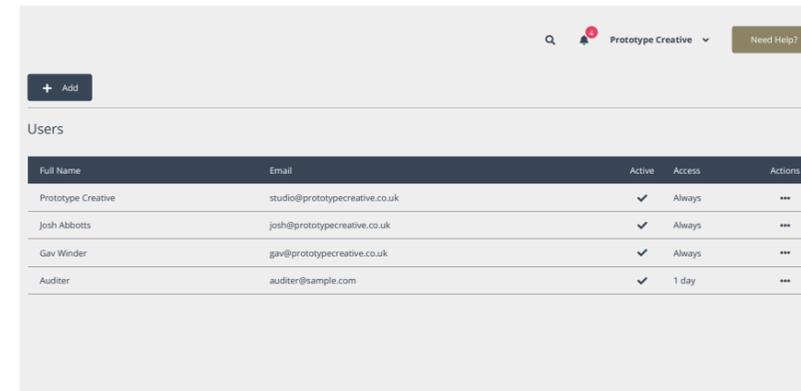
To add a new user, click the



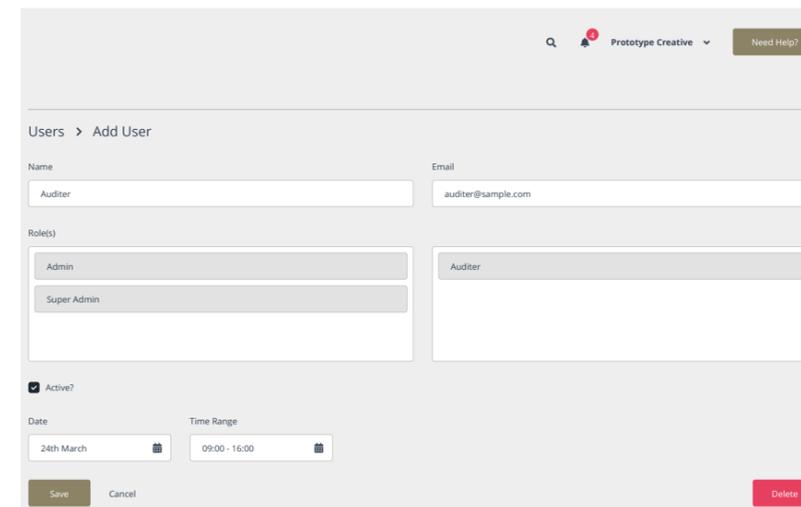
To edit or remove an existing user click the  button and select "edit" or "remove" from the dropdown options.

The Edit/Add user page allows you to input or change the users:

- Name
- Email
- Roles
- Active status
- Date & time range



Users overview



Edit / Add user

FILES

To view, add or edit your files, please click the "Files" button.



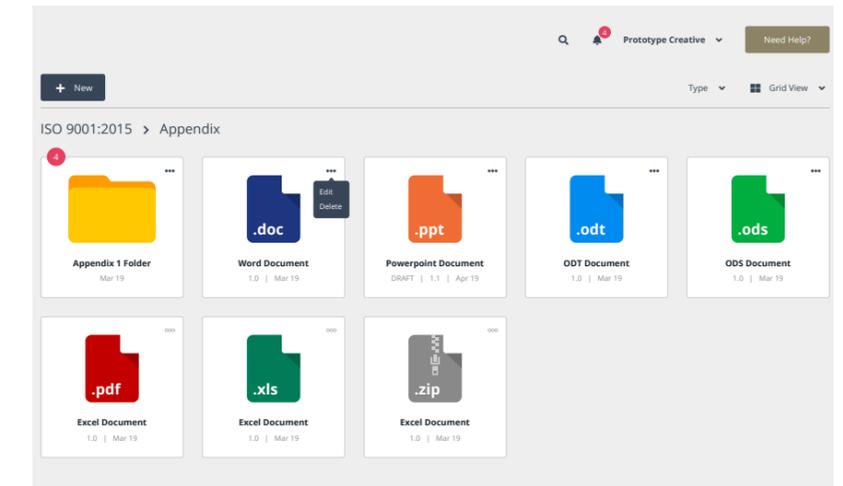
This will open the files page.

To edit or remove a file click the  button and select "edit" or "delete" from the dropdown options.

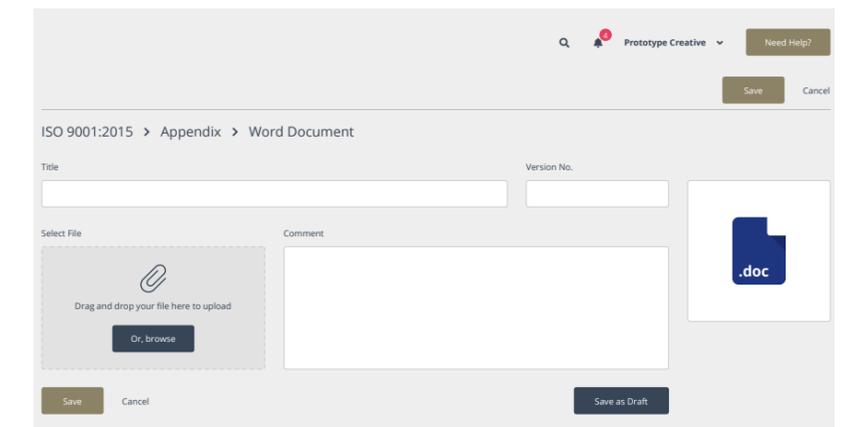
The edit page allows you to input or change the: Title, version number, uploaded file & Add comments.

You can save your changes by clicking the  button

To save the file as a draft click the  button.



Files overview

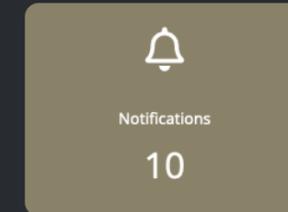


Adding a file



NOTIFICATIONS

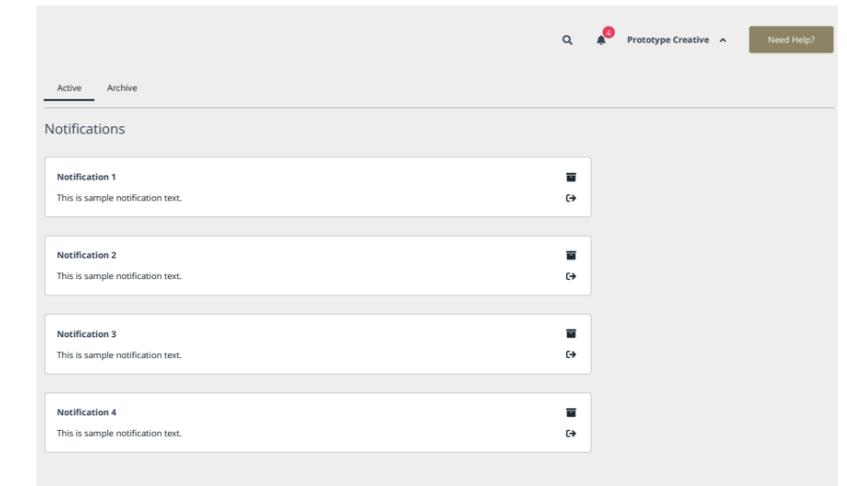
To view your notifications please click the "Notifications" button.



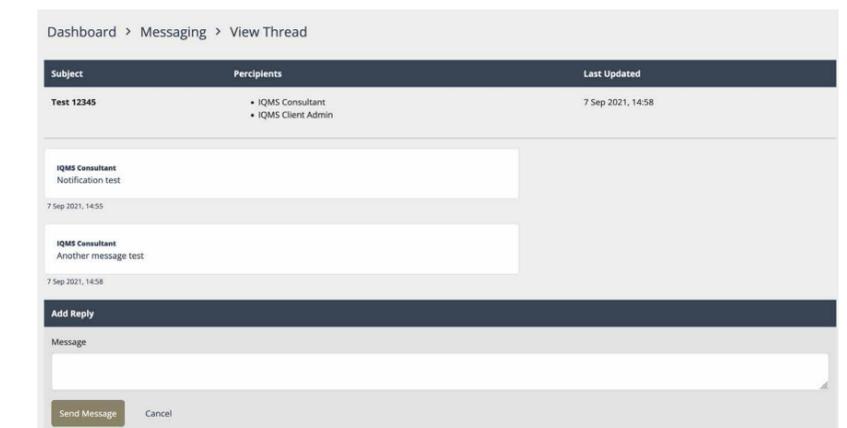
This will open the notifications page. From here you can view and reply to notifications.

To view a notification thread, simply click on the notification you want to view.

This will open the view thread page. Here you can view all previous messages and reply by using the [Add Reply](#) section.



Notification overview



Notification thread

SIDE NAVIGATION MENU

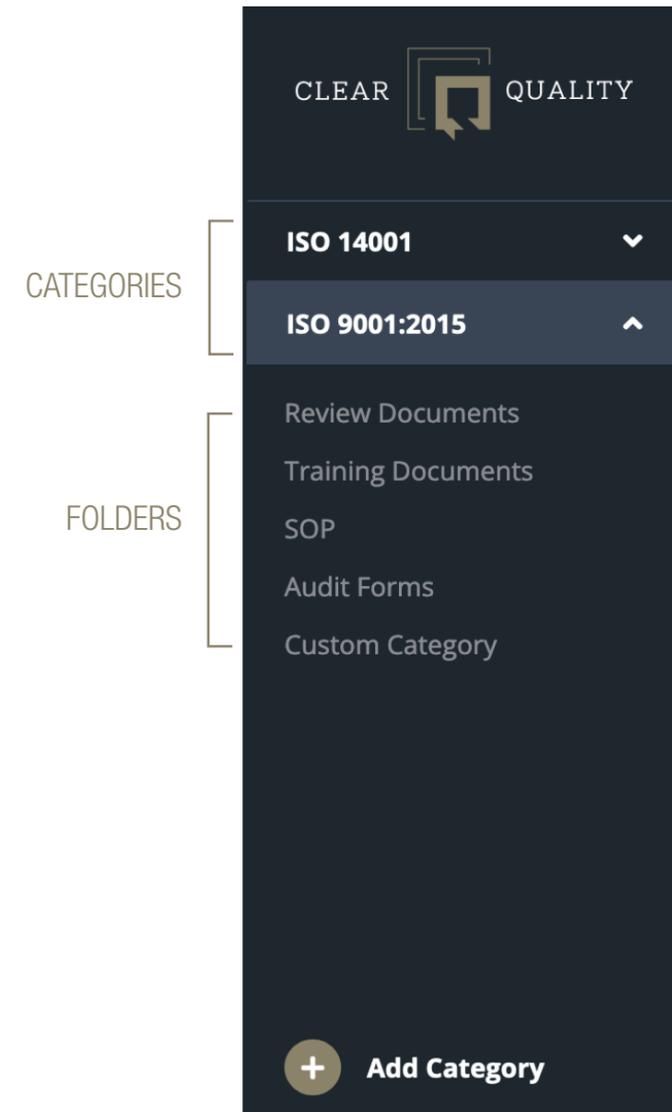
The side navigation allows users to organise their files into individual categories and folders.

Categories

A category is a main folder which can contain sub folders and files. This allows a user to create individual categories for different ISO standards.

Folders

A folder is a container for individual files. They allow the user to group relevant files together to improve usability. Each category can contain multiple folders, as the example to the right shows.



Side Navigation Menu

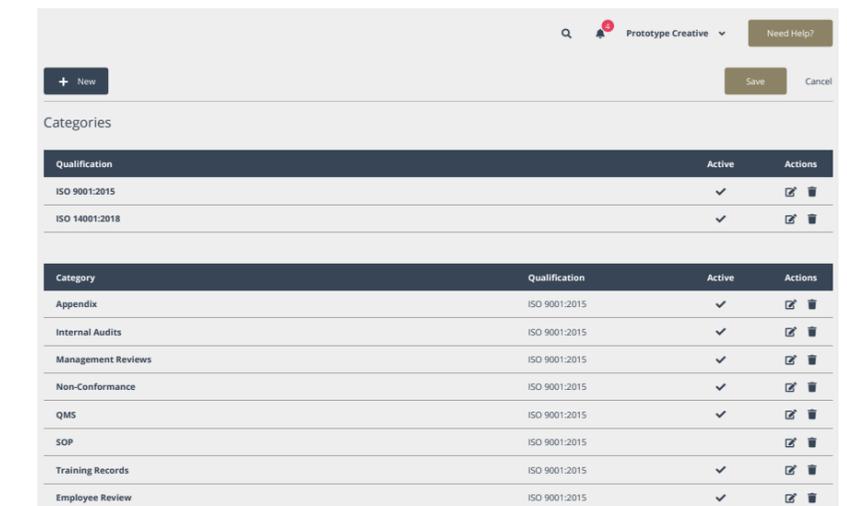
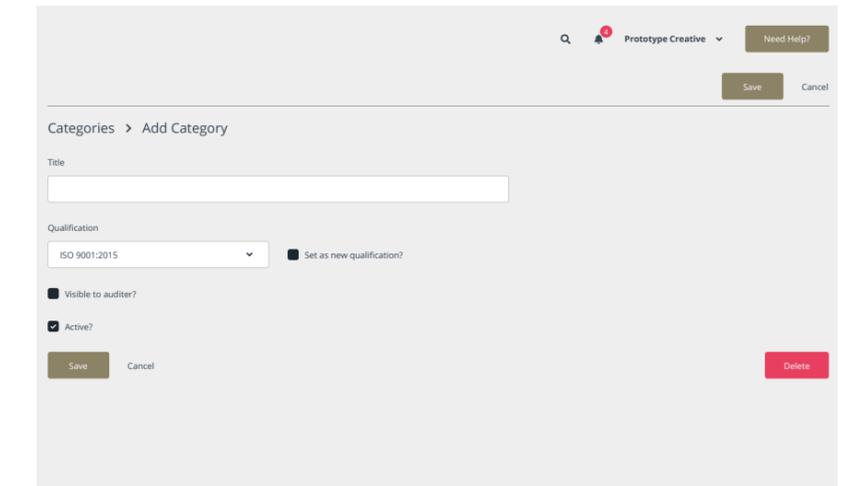
CATEGORIES

To create a new Category click the **+ Add Category** button.

This will open a new page where you can add the following details:

- Title
- Qualification
- Visibility
- Active status

The Categories page allows you to view, edit, add or delete all created categories.

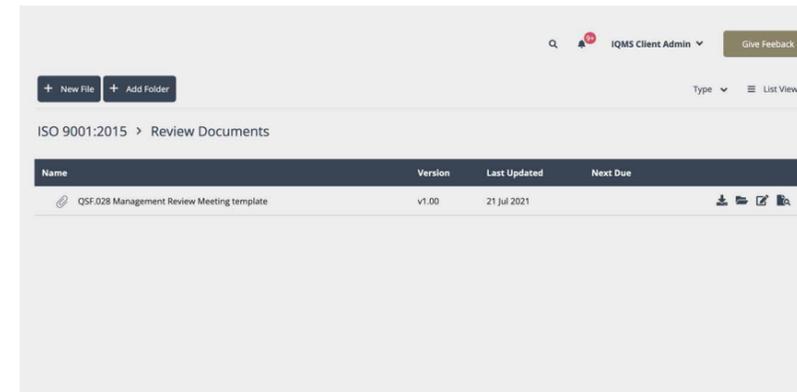


FOLDERS

To add a new folder click the **+ Add Folder** button

Enter the new folder name and click the Save button.

To add a new file to this folder click the **+ New File** button.



Folder overview

Add Folder ✕

Folder Name

Save

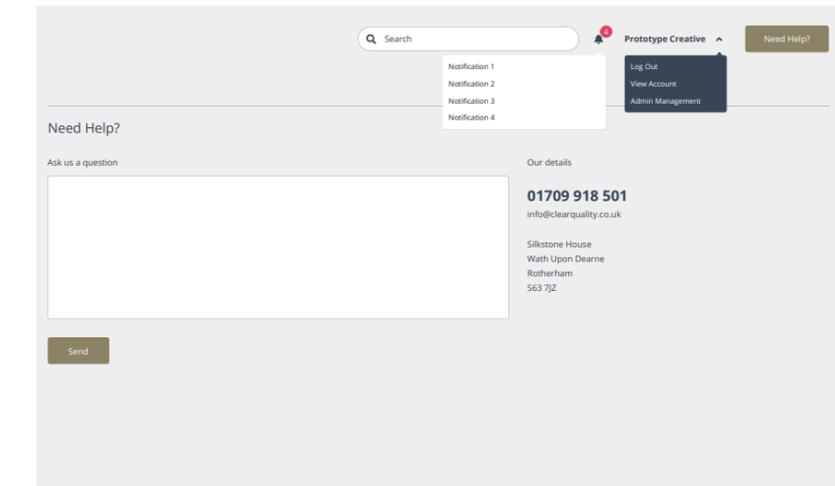
Close

Add folder

HELP/FEEDBACK

If you require help or wish to provide feedback, please click the **Need Help?** button.

You can then enter your message and send it or contact Clear Quality directly via the listed phone or email details.





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