

OPERATE - SOQM

The following describes the functionality and features included in SQM.

Objective

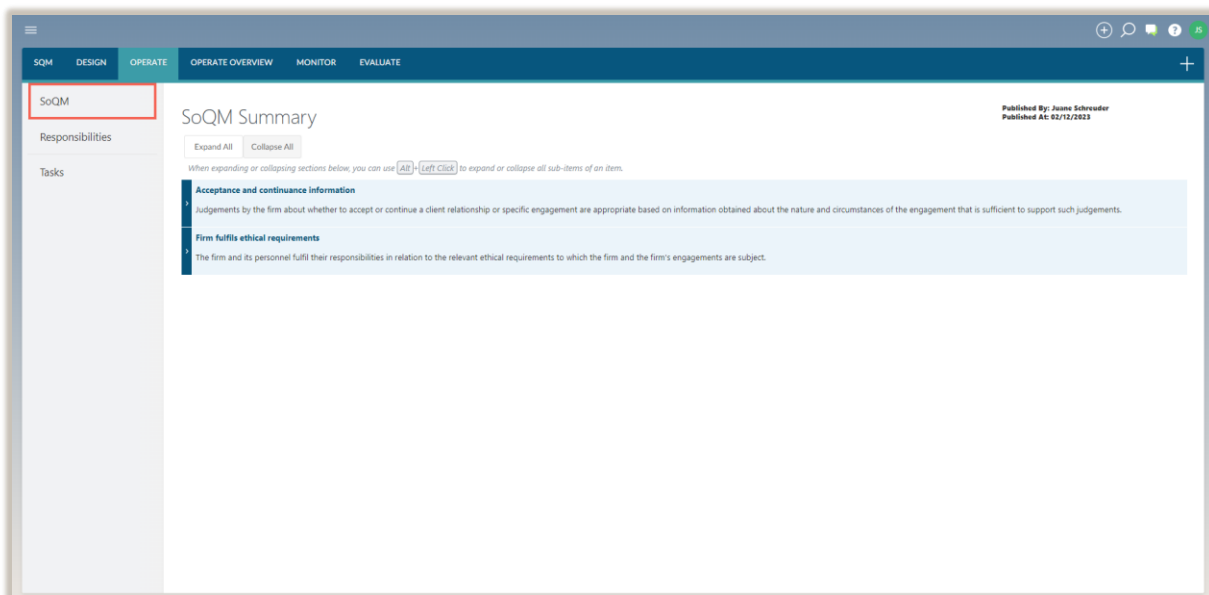
The objective of this page in SQM is to provide all SQM users access to the firm's published system of quality management.

Page position

SoQM can be found in the OPERATE module.

Page content

This page includes the firm's published system of quality management reflecting each objective with their linked quality risks, policy and procedure responses and tasks.



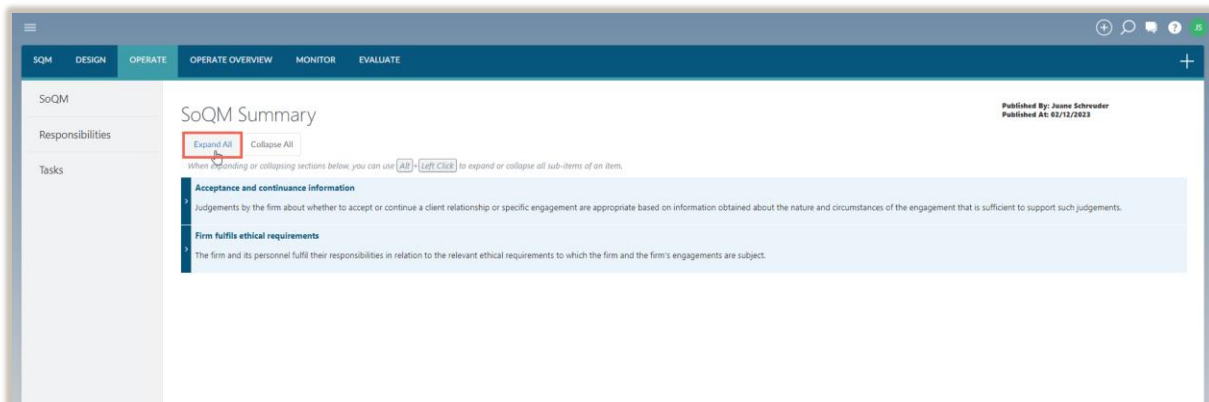
1. Expand and collapse all content

The default view of the system of quality management is a collapsed version, reflecting the firm's quality objectives only.

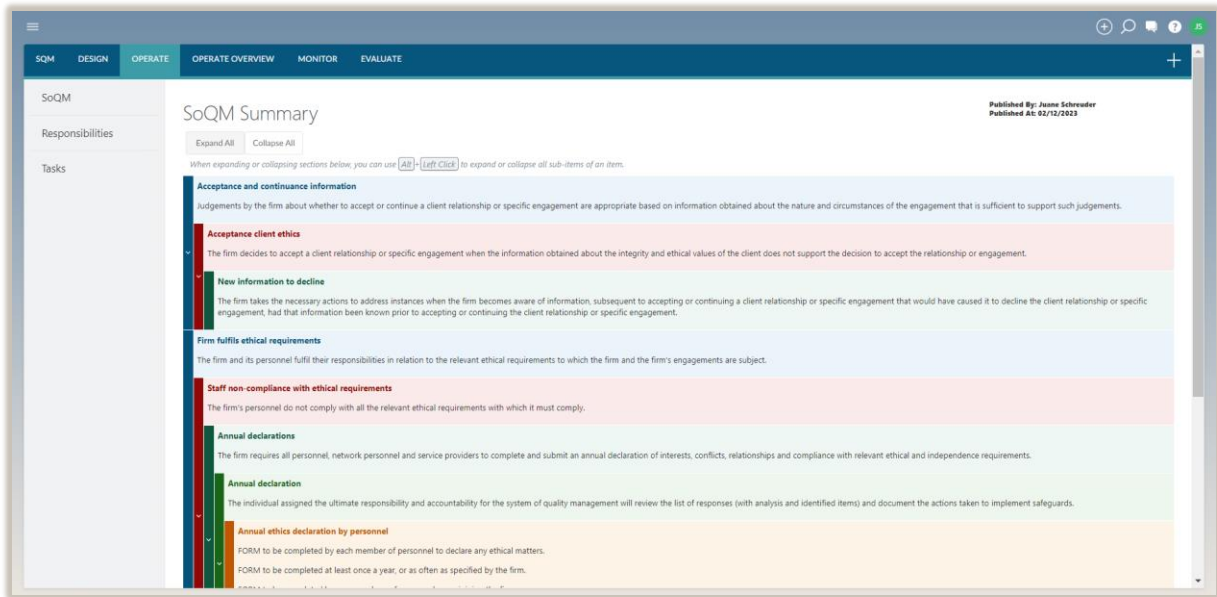
EXPAND ALL CONTENT

This view can be expanded to show the linked quality risks with their responses.

Click EXPAND ALL

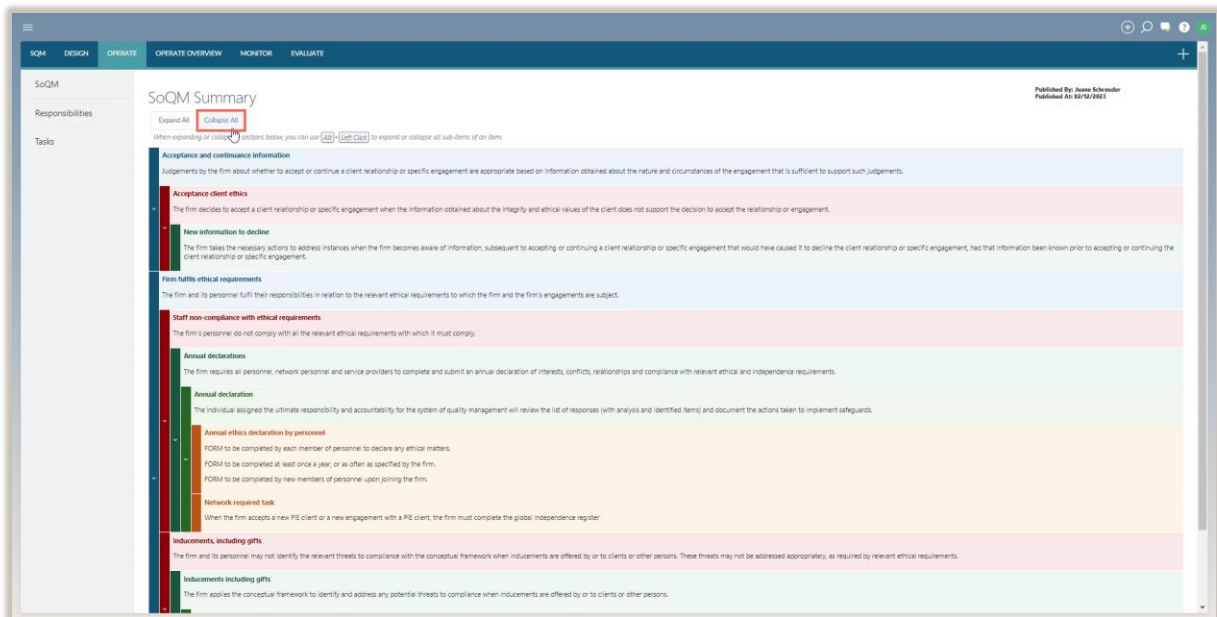


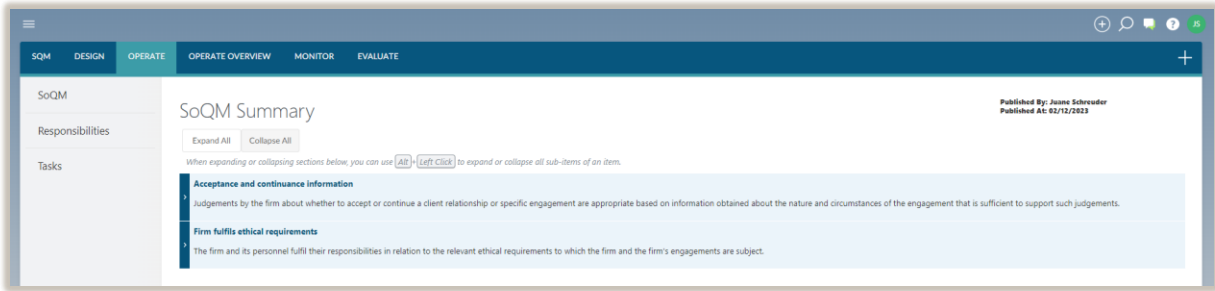
The expanded system of quality management reflects the different elements in specific colours to facilitate the identification of the specific elements.



COLLAPSE ALL CONTENT

Click COLLAPSE ALL to view the quality objectives only.



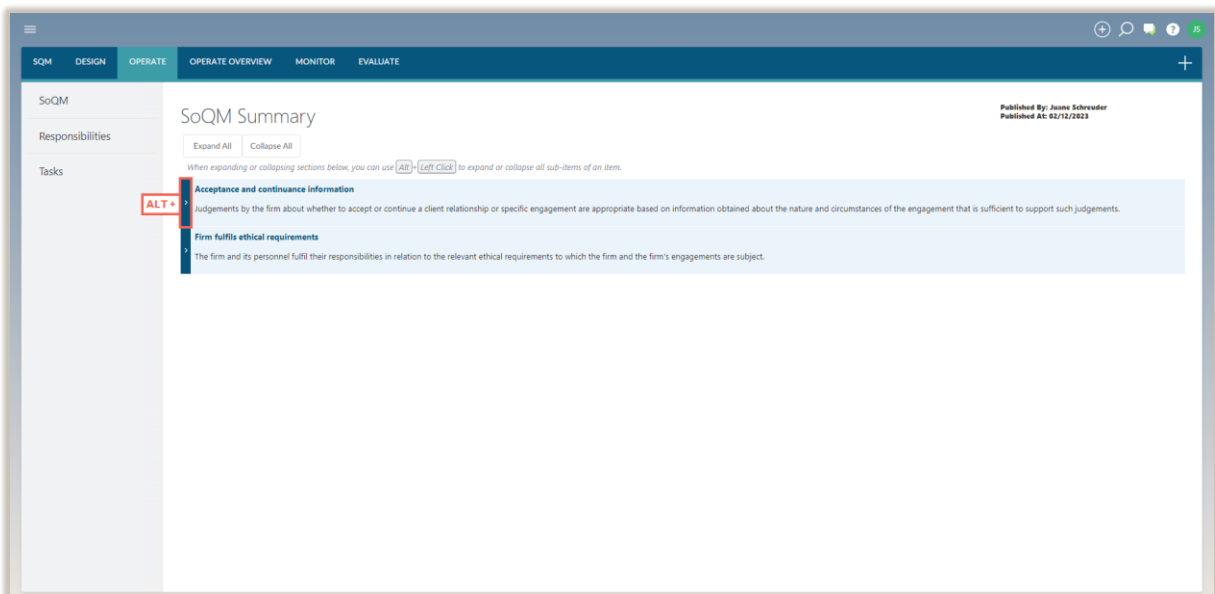


2. Expand or collapse sections at a time

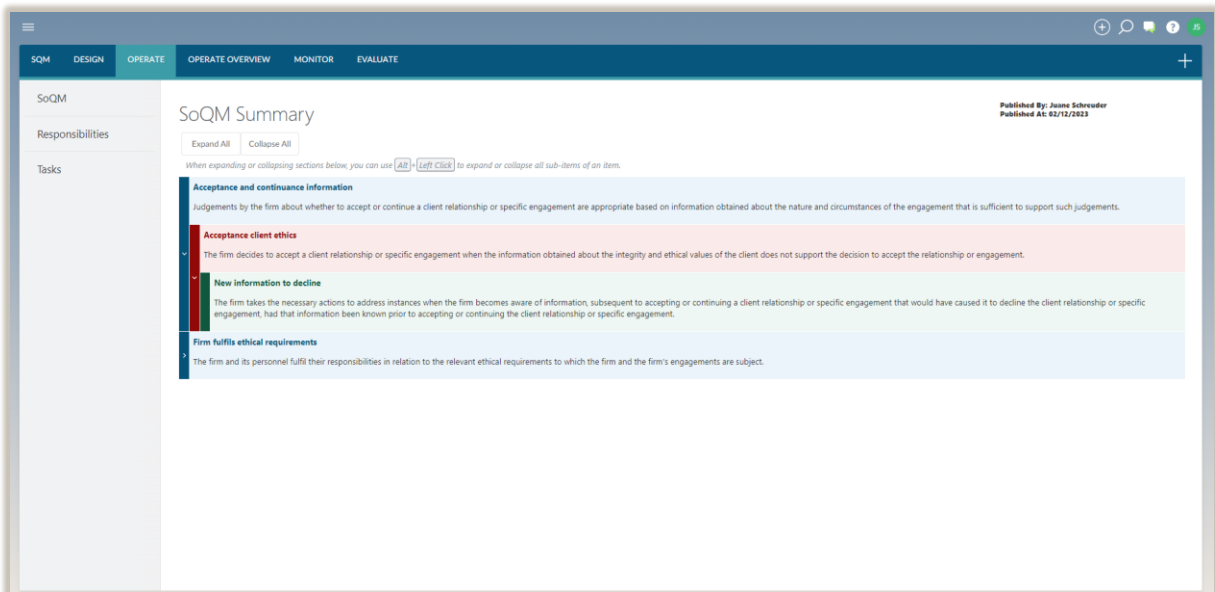
EXPAND SECTIONS

Users can also view the system of quality management through expanding all sub-items of an individual item.

To expand all the content linked to a specific objective only, hold ALT and click on the expand button.



All the sub-items linked to the objective will then be expanded.

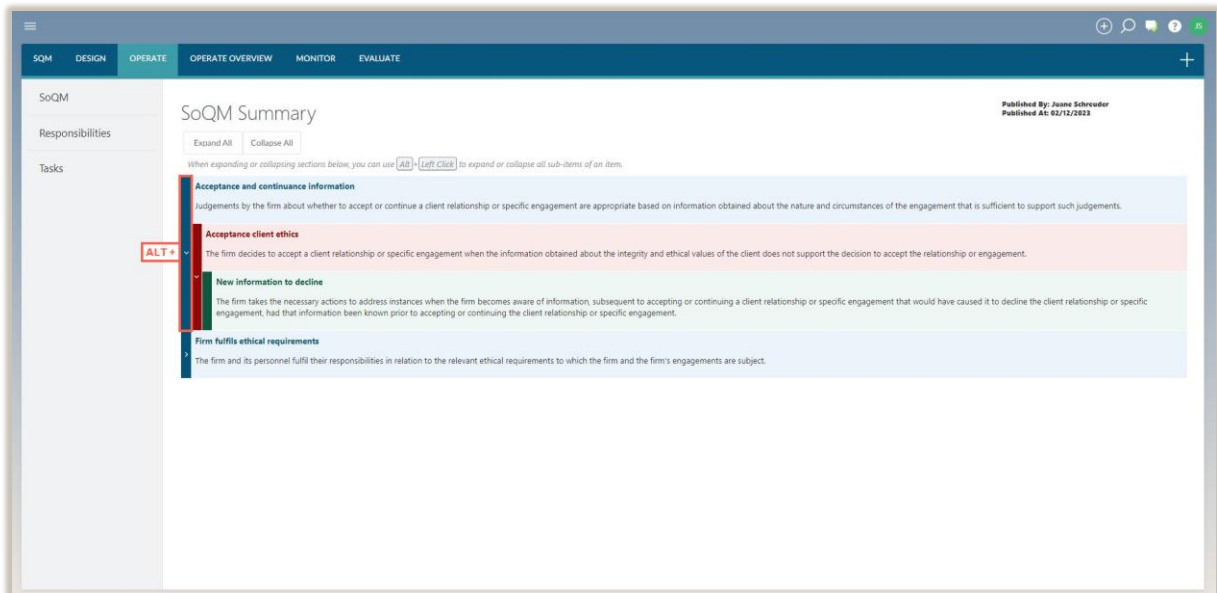


COLLAPSE SECTIONS

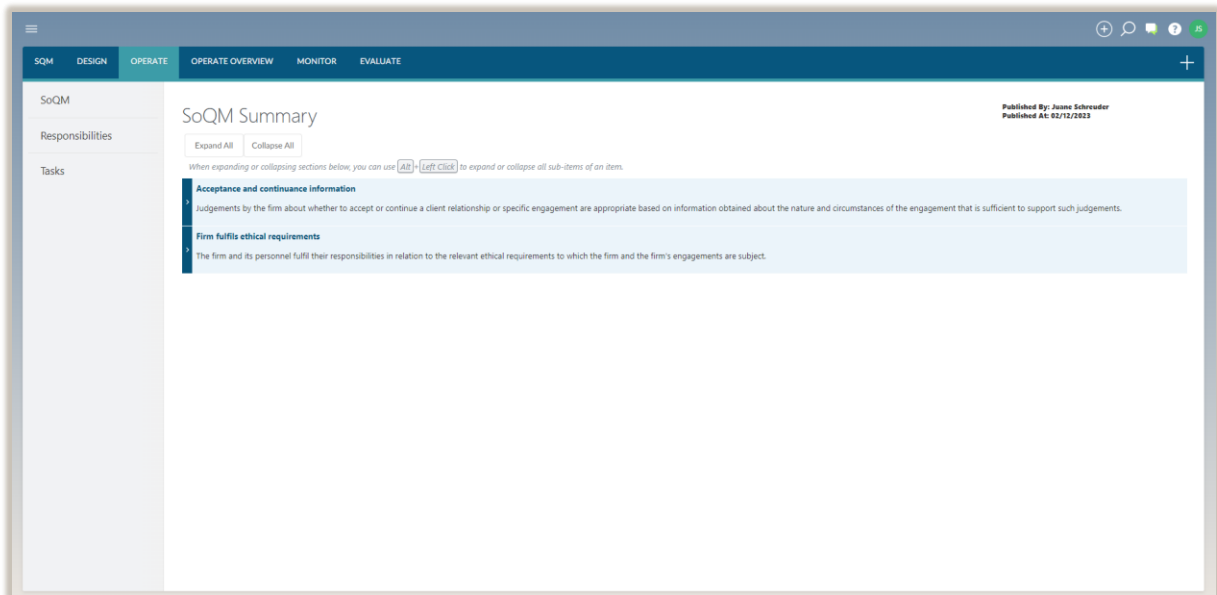
Users can also collapse all sub-items of an item in one action.

To collapse content linked to a specific line item, hold ALT and click on the collapse button to collapse the sub-items.

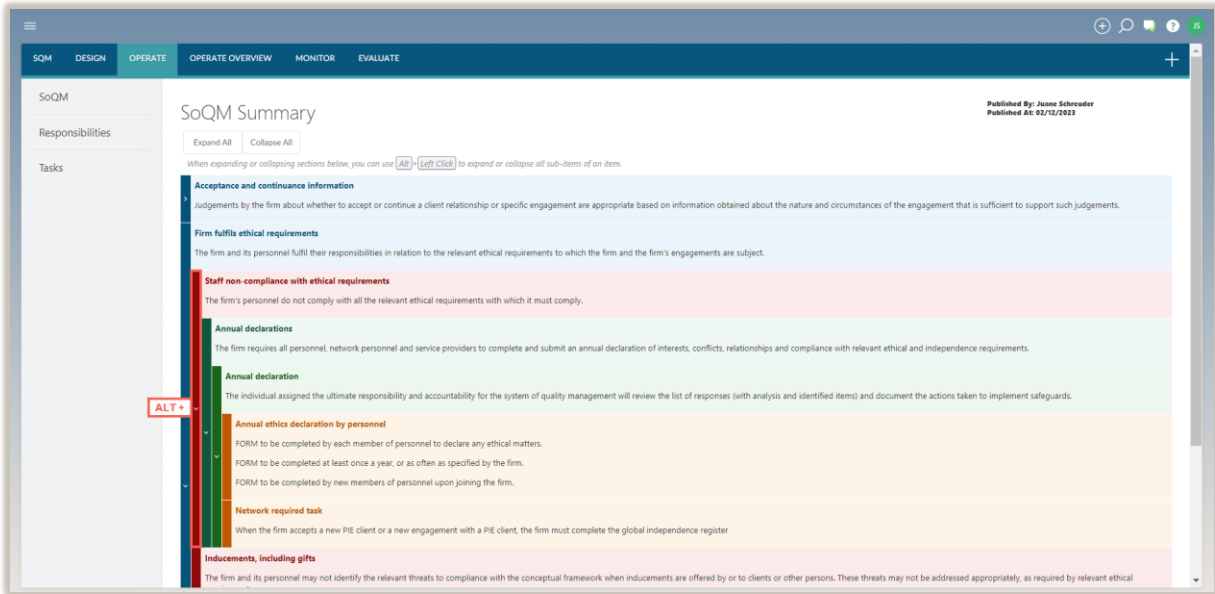
For example, in the screenshot below, collapse the risk and policy response for the objective.



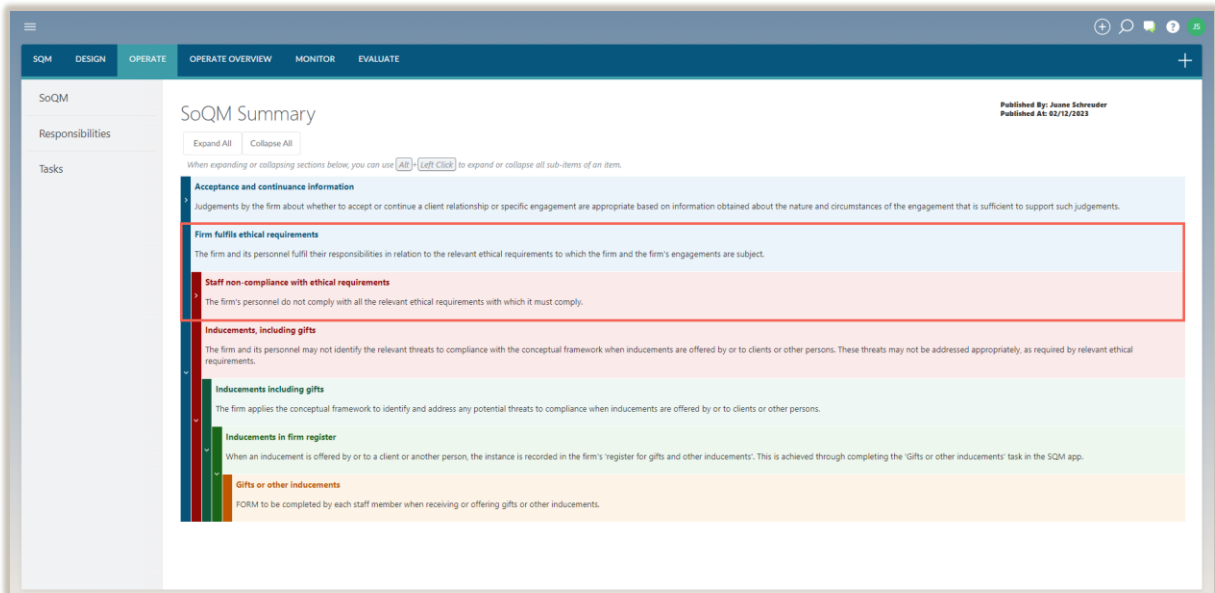
The sub-items will be collapsed and only the item will be visible.



Expanding and collapsing sections can also be done at risk-level or at any of the other levels. For example, using ALT and collapse to collapse the sub-items of a risk.



Only the objective and risk items are visible after collapsing the sub-items of the risk.

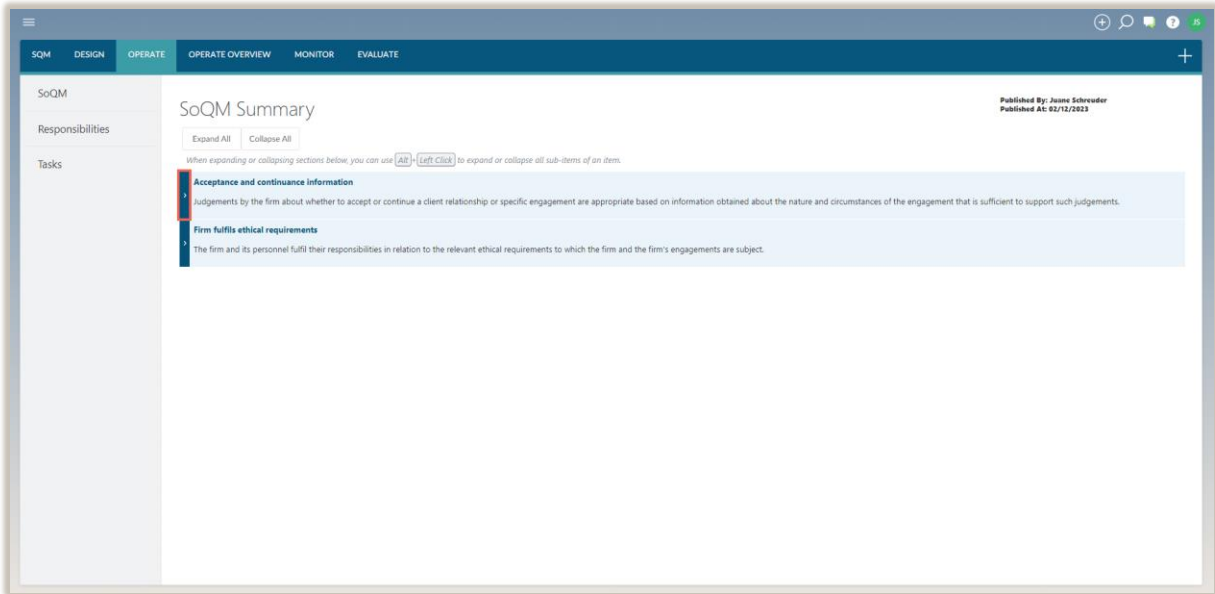


3. Expand and collapse individual line items

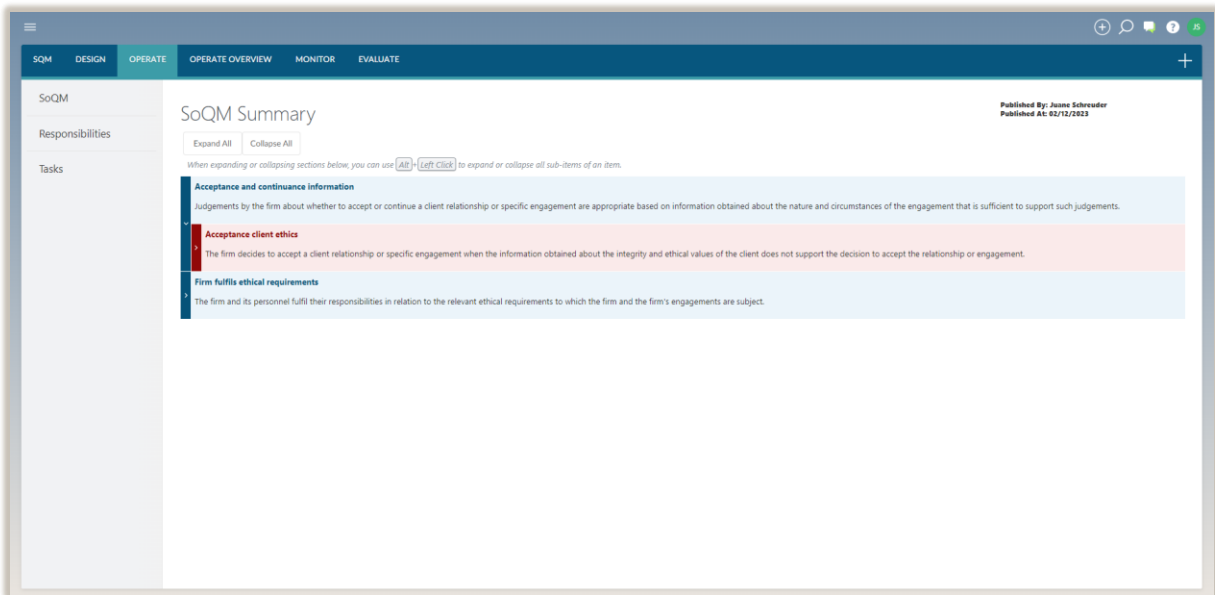
Users can also view the system of quality management through only expanding individual items of sub-items included in the system.

EXPAND INDIVIDUAL LINE ITEMS

To expand or collapse the system one line at a time, click on the expand button to open the next linked item.

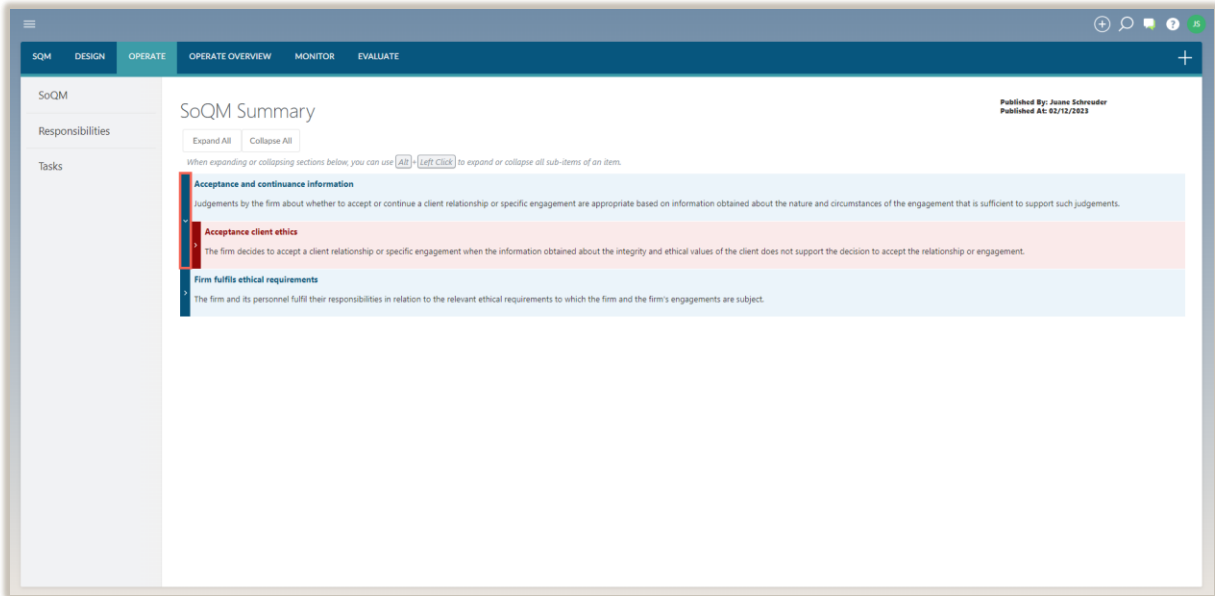


The expanded line will then be visible.
In the example shown below, the risk linked to the objective is visible.



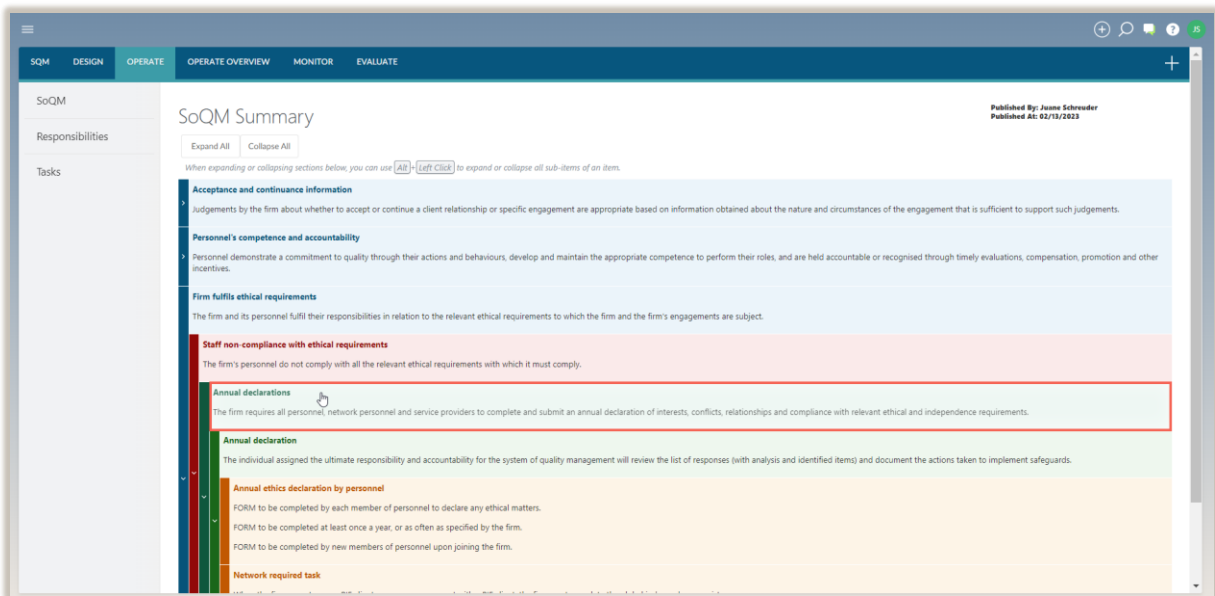
COLLAPSE INDIVIDUAL LINE ITEMS

Click on the collapse button to collapse the content linked to that line.
In the example shown below, click on the collapse button for the objective to collapse the risk.

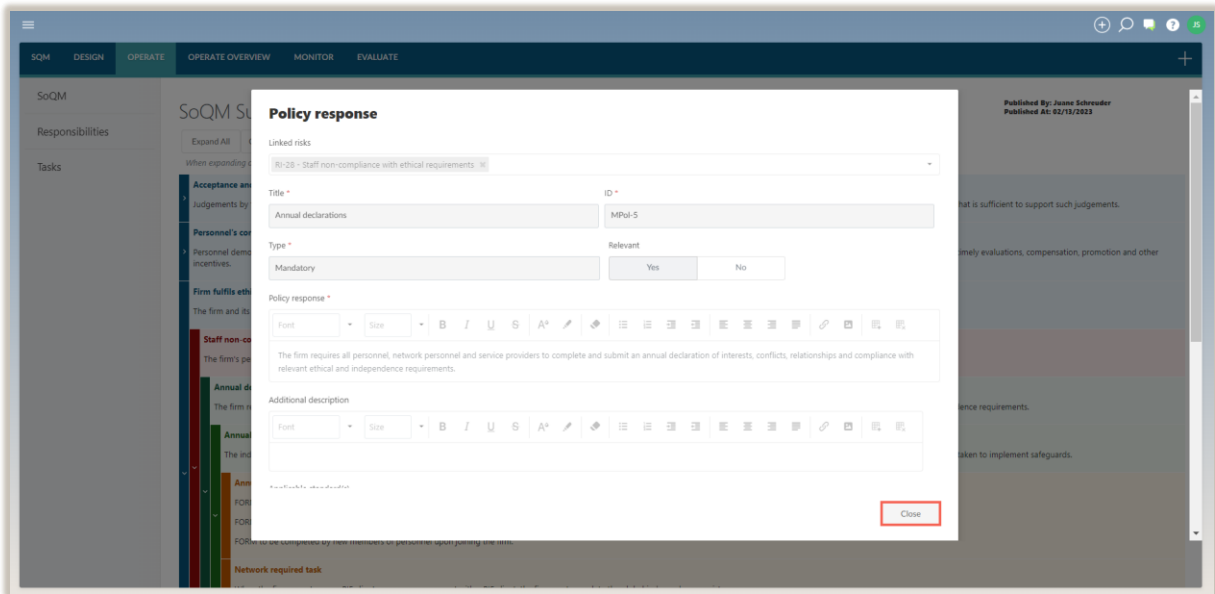


4. View dialogs of individual items

Users can view the detail of an individual objective, risk, policy, procedure or task.
To open the individual dialog, click on the field that contains the title and detail of the item.



The dialog of that item will open in read-only format.
Click CLOSE to close the dialog and return to the published system of quality management.



Page Outcomes

All users of SQM must familiarise themselves with the content of the firm's system of quality management so that they can comply with the policies and procedures and complete the tasks as they relate to their role in the firm.

Features

There are no additional features on this page.