



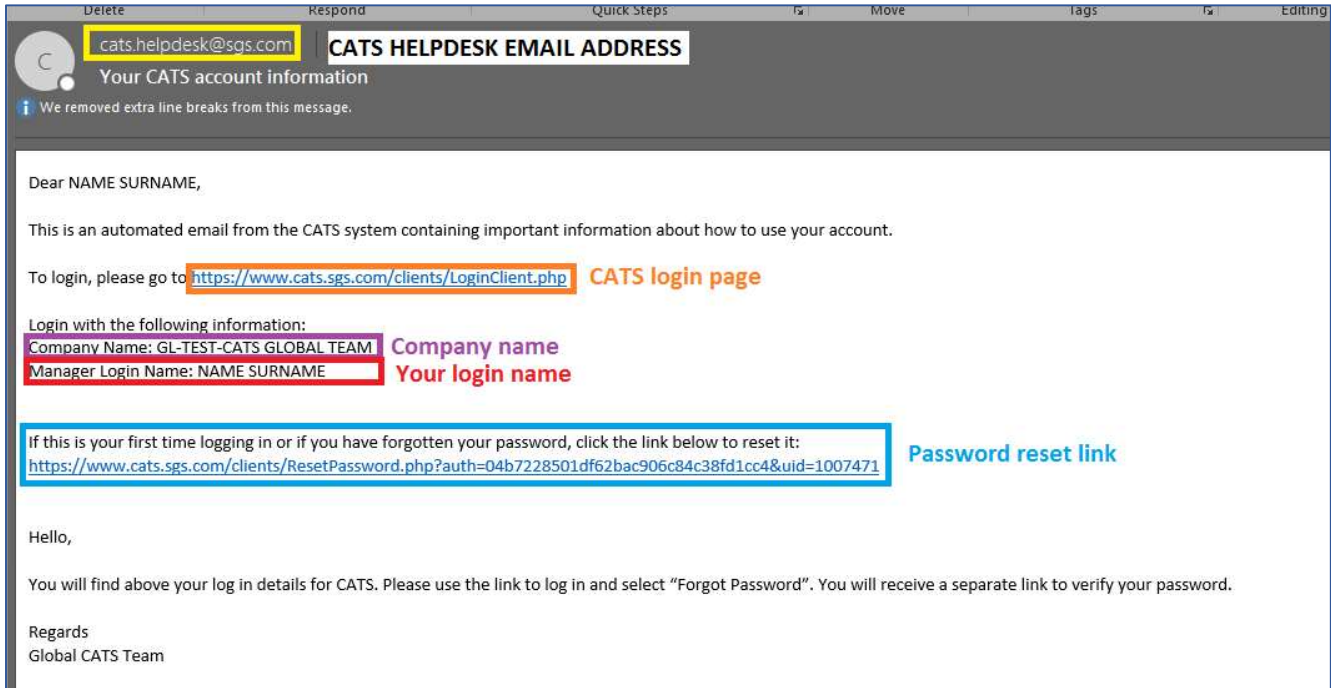
# ERICSSON - CAPA SUPPLIER MANUAL

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## 1. LOGGING INTO CATS PLATFORM

To be able to log into CATS platform, you need to have your own account assigned to your company. Once the account has been created, you will receive a notification from [cats.helpdesk@sgs.com](mailto:cats.helpdesk@sgs.com) informing you about your login name and company name:



To log into the platform, click on the following link:  
<https://www.cats.sgs.com/clients/LoginClient.norm.php>

You will be redirected to the Client Portal logging page:

The screenshot shows a web form titled 'COMPANY LOG IN'. It contains three input fields: 'Company Name' with the value 'GL-TEST-CATS GLOBAL TEAM', 'Manager Login Name' with the value 'NAME SURNAME', and 'Password' which is masked with dots. Below the fields are two buttons: 'Go' and 'Get Password'.

**Company name** – the company name should consist of 3 elements:



**Login name** – the login name is case sensitive, so you need to be careful while typing it in (you can also copy it from the notification body).

**Password** – by default the password is set to Changeme123, you need to change it by using the "Get Password" button (for more details, see section 2).

**NOTE:** You should never share your account internally or externally. The login credentials are intended for your own use only. If more than one person should have access to your location's data, contact SGS Project Manager taking care of your company.

In very rare cases, the account can be shared between few people. However, the shared accounts are set in a different way and the required access should be confirmed during the **Project Set-up Phase**.

## 2. CHANGING THE PASSWORD

If you forgot your password or want to change it after first login (or due to other reason), you need to go to the Client Portal Login Page and click on the "**Forgot Password**".

**COMPANY LOG IN**

Company Name:

Manager Login Name:

Password:

Go

➔ Get Password

The system will redirect you to **Password Reset Page**.

If you would like to reset your password, please enter your login credentials below and an email with instructions on how to reset the password will be sent to your account's contact address.

Company Name:  
GL-TEST-CATS GLOBAL TEAM

Manager Login Name:  
NAME SURNAME

Send Reset Link

You need to add full company name (or copy it from notification) and your login name, then click on the "**Send Reset Link**".

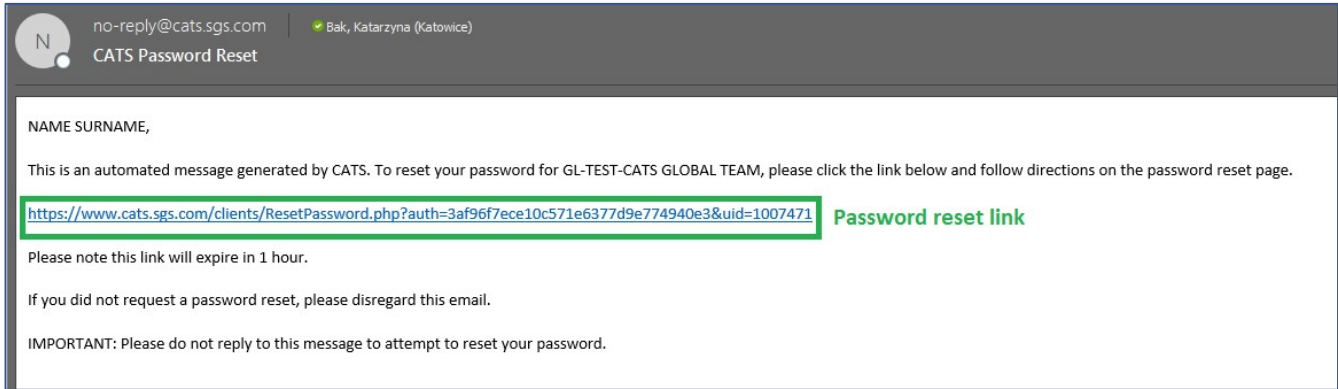
If you would like to reset your password, please enter your login credentials below and an email with instructions on how to reset the password will be sent to your account's contact address.

Company Name:  
GL-TEST-CATS GLOBAL TEAM

Manager Login Name:  
NAME SURNAME

➔ Send Reset Link

The link with password reset will be send to your mailbox.



The password reset link will be active for 1 hour only, after that time you will need to generate a new link.

**NOTE: Sometimes the notification email are redirected to the SPAM folder.**

When you click on the link, you will be redirected to the second **Password Reset Page**.

Verify Company Name:

Verify Login Name:

New Password:

Verify New Password:

You need to add your company name and login name again and create new password. Once done, click on "**Change Password**" button.

Verify Company Name:

1.

Verify Login Name:


2.

New Password: Moderate

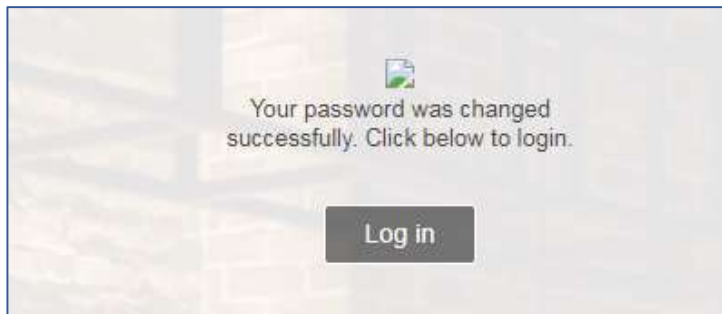
3.

Verify New Password:

4.

5. 

When you click on the "Change Password" button, your password will be changed.



### 3. ACTION PLAN LOG

Action Plan log can be accessed through the calendar or widgets added to Dashboard. The way to get into Action Plan log has been described in preceding sections.

**NOTE:** If you are an additional (shadow) contact for your area/level, you will not be able to access the Action Plan log.

Action Items For Evaluation 36243  
003 — Antarctica offline  
2019-01-18

Items highlighted in **red** are waiting on you.  Show completed action items Filter by category: Show all categories ▼ Apply Filter

QUESTION	RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
Is there a procedure for equipment lockout?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are you required to have a confined space entry program?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>

The Action Plan log is showing useful data and allows you to answer an Auditor/Technical Reviewer. Below you will find some explanation related to data shown in the log.

Items highlighted in **red** are waiting on you.  Show completed action items

QUESTION	RESPONSE
Is there a procedure for equipment lockout?	QUESTION TEXT - IT WILL SHOW YOU WHICH QUESTION HAD A NONCONFORMITY RAISED Minor
Are you required to have a confined space entry program?	Major

	RESPONSE	DUE DATE	ANSW
ment lockout?	Minor	2019-04-01	N S
onfined space entry program?	Major	2019-03-02	N S
the requirement is being followed?	Major	2019-03-02	N S
s associated with confined spaces?	Minor	2019-04-01	N S
tion program?	Major	2019-03-02	N S
s associated with working at heights?	Minor	2019-04-01	N S
followed?	Major	2019-03-02	N S

**DUE DATE BEFORE WHICH THE NONCONFORMITY NEEDS TO BE CLOSED** →

**STATUS OF NONCONFORMITY WILL UPDATE ONCE YOU ANSWER THE AUDITOR OR THE NONCONFORMITY IS CLOSED**

DUE DATE	WAITING ON	CATEGORY	ST	DETAILS
2019-04-01	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
2019-03-02	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
	<b>NONCONFORMITY TYPE</b> SURNAME	Major	not started	<a href="#">View/Edit Details</a>
2019-04-01	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
2019-03-02	NAME SURNAME	Major	not started	<b>CLICK TO ACCESS THE DISCUSSION PANEL</b>
2019-04-01	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
2019-03-02	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>

**↑ YOUR NAME AND SURNAME WILL APPEAR HERE**

The red colour means that the nonconformity is waiting on your reaction. To be able to answer, click on "**View/Edit Details**" link, which will redirect you to Discussion Panel.

Once a nonconformity is closed, it will disappear from the list.

Before closing nonconformity (7 NCs):

QUESTION	RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
Is there a procedure for equipment lockout?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are you required to have a confined space entry program?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>

After closing the nonconformity (6 NCs):

QUESTION	RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
Is there a procedure for equipment lockout?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are you required to have a confined space entry program?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>

When a nonconformity is closed or modified (answered by you, Auditor or Technical Reviewer), you will get a notification. The example below is informing you about a nonconformity being closed.

Reply Reply All Forward IM

noreply@sassieshop.com

An Action Plan item for GL-TEST-CATS GLOBAL TEAM: EXAMPLE CHECKLIST, Location 003 - Antarctica offline has been set to Completed

The Action Plan item for Evaluation 36243 - Are the requirements being followed? has been set to Completed by Katarzyna Bak.

A new message was added:

[Click to view Action Plan item.](#)

[Auditor Login](#)

To be able to see the closed nonconformity, tick the "Show completed action items" and click on "Apply Filter" button.

Action Items For Evaluation 36243  
003 — Antarctica offline  
2019-01-18

1.  Show completed action items

Filter by category: Show all categories ▾

2. **Apply Filter**

	RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>

Once the page loads, you will see the completed nonconformity (white):

Items highlighted in red are waiting on you.  Show completed action items Filter by category: Show all categories ▾ **Apply Filter**

QUESTION	RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
Is there a procedure for equipment lockout?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are you required to have a confined space entry program?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Major	2019-02-06	--	Major	complete	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>

You can also filter the nonconformities by type. To do so, use the pull-down added next to the "Apply Filter" button to pick a type of nonconformity:

Action Items For Evaluation 36243  
003 — Antarctica offline  
2019-01-18

Show completed action items

Filter by category: Show all categories ▾ **Apply Filter**

- Show all categories
- Major
- Minor

	RESPONSE	DUE DATE	WAITING ON	CA	DETAILS
	Major	2019-02-06	NAME SURNAME	Major	not started <a href="#">View/Edit Details</a>
	Minor	2019-02-04	NAME SURNAME	Minor	not started <a href="#">View/Edit Details</a>

Once you pick one of the types, click on the "Apply Filter" button. The view will now show only one type of nonconformities:

Action Items For Evaluation 36243  
003 — Antarctica offline  
2019-01-18

Items highlighted in red are waiting on you.  Show completed action items

↓ 1.

Filter by category:
Major
▼

↓ 2.
Apply Filter

QUESTION	RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
Is there a procedure for equipment lockout?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Are the requirements being followed?	Major	2019-02-06	--	Major	complete	<a href="#">View/Edit Details</a>
Can it be demonstrated that the requirement is being followed?	Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>

RESULTS

*It is of the utmost importance that you have completed your Route Cause Analysis and determined the corrective actions that will be implemented prior to starting the response to your action plans.*

#### 4. USING DISCUSSION PANEL

The Discussion Panel is used to manage nonconformities, close them, upload evidence and answer the questions raised by Auditor. As Action Plan Owner, you will need to be able to use it.

To get into Discussion Panel, go to Action Plan log and click on "View/Edit Details".

or Evaluation 36243  
Antarctica offline  
19-01-18

Show completed action items    Filter by category:

RESPONSE	DUE DATE	WAITING ON	CATEGORY	STATUS	DETAILS
Major	2019-02-06	NAME SURNAME	Major	not started	<a href="#">View/Edit Details</a>
Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>
Minor	2019-02-04	NAME SURNAME	Minor	not started	<a href="#">View/Edit Details</a>

A Discussion Panel for this nonconformity will open – as shown on the below screenshot:

#### Action Item Details

**Details**

Audit ID	215735
Location	testowa - TEST1
Question #611	6.6 Harassment and abuse
Response	YES
Linked Data	<a href="#">Show</a>
Score	0 / 1
Category	Non-conformity
Due Date	1969-12-31
Waiting on	Monika Malkiewicz (Auditor)

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Action Plan and Documents - Not Yet Submitted [View Details](#)

---

Closing Comments and Documents - Not Yet Submitted [View Details](#)

---

**Discussion**

Please select the user who needs to perform the next step in the Non-Conformities process


Waiting on:     Status:

Type new message here

The "Details" show all data related to the nonconformity.

Details	
<b>Evaluation ID</b>	36243
<b>Location</b>	003 - Antarctica offline
<b>Question</b>	Is there a procedure for equipment lockout?
<b>Response</b>	Major
<b>Linked Data</b>	<a href="#">Show</a>
<b>Score</b>	-- / --
<b>Category</b>	Major
<b>Due Date</b>	<input type="text" value="2019-02-06"/>
<b>Waiting on</b>	NAME SURNAME (Location Manager)

You can see all photos and comments added by Auditor by clicking on the "Show" link.

Details	
<b>Evaluation ID</b>	36243
<b>Location</b>	003 - Antarctica offline
<b>Question</b>	Is there a procedure for equipment lockout?
<b>Response</b>	Major
<b>Linked Data</b>	<a href="#">Show</a> 
<b>Score</b>	-- / --
<b>Category</b>	Major
<b>Due Date</b>	<input type="text" value="2019-02-06"/>
<b>Waiting on</b>	NAME SURNAME (Location Manager)

Details	
<b>Evaluation ID</b>	36243
<b>Location</b>	003 - Antarctica offline
<b>Question</b>	Is there a procedure for equipment lockout?
<b>Response</b>	Major
<b>Linked Data</b>	<a href="#">Hide</a>
	<b>Auditor comments</b>
	Comments
<b>Score</b>	-- / --
<b>Category</b>	Major
<b>Due Date</b>	2019-02-06
<b>Waiting on</b>	NAME SURNAME (Location Manager)

The "Details" will show the due date before which you need to complete the actions required to close the nonconformities.

Details	
<b>Evaluation ID</b>	36243
<b>Location</b>	003 - Antarctica offline
<b>Question</b>	Is there a procedure for equipment lockout?
<b>Response</b>	Major
<b>Linked Data</b>	<a href="#">Hide</a>
	<b>Auditor comments</b>
	Comments
<b>Score</b>	-- / --
<b>Category</b>	Major
<b>Due Date</b>	2019-02-06
<b>Waiting on</b>	NAME SURNAME (Location Manager)

Action Plan and Documents - <b>Not Yet Submitted</b>	<a href="#">View Details</a>
<b>Root Cause Analysis and Corrective Action Plan</b>	
Closing Comments and Documents - <b>Not Yet Submitted</b>	<a href="#">View Details</a>
<b>Corrective Actions and evidence of implementation</b>	

In the section above for "Action Plan and Documents", please ensure that you document your **Root Cause Analysis and your Corrective Action Plan** to address the issues identified by your root cause analysis.

In the section above for "Closing comments and documents" please ensure that you document the **Corrective Actions that have been taken and the evidence that confirms the completed actions.**

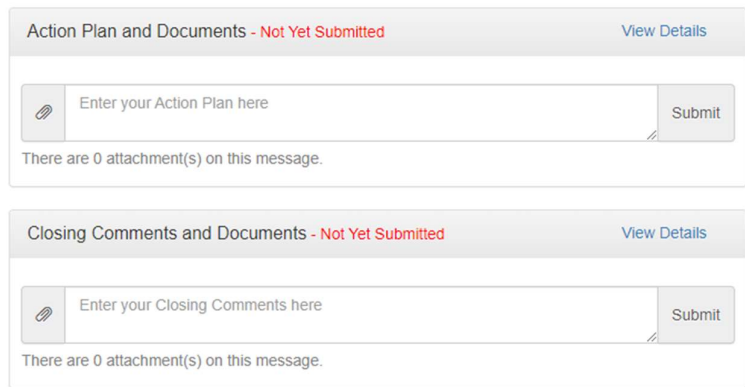
Definitions

**Root Cause Analysis:** the process of investigation to determine the factor(s) which have caused a nonconformance

**Corrective action:** actions taken to eliminate the cause of a nonconformity and to prevent recurrence

**Corrective Action Plan:** the corrective actions that are planned to be taken, including timeframes, to eliminate the factors that caused the nonconformance identified from the Root Cause Analysis

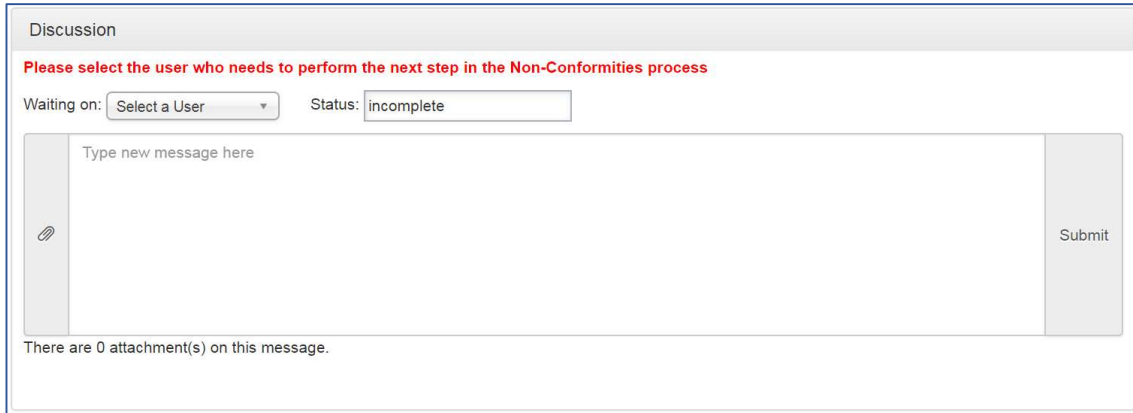
Once you click on the "View Details" on both boxes, you should be able to see this view (if you are the Plan Owner):



Robust Root Cause Analysis and Corrective Actions with evidence will ease the Auditor work and final verification in order to close the non-conformity.

Once you add the needed comments and/or closing comments – **please click on "Submit" buttons** depending to which box you added the data.

To answer the Auditor, you need to use the "Discussion" part of the Panel.



Discussion

Please select the user who needs to perform the next step in the Non-Conformities process

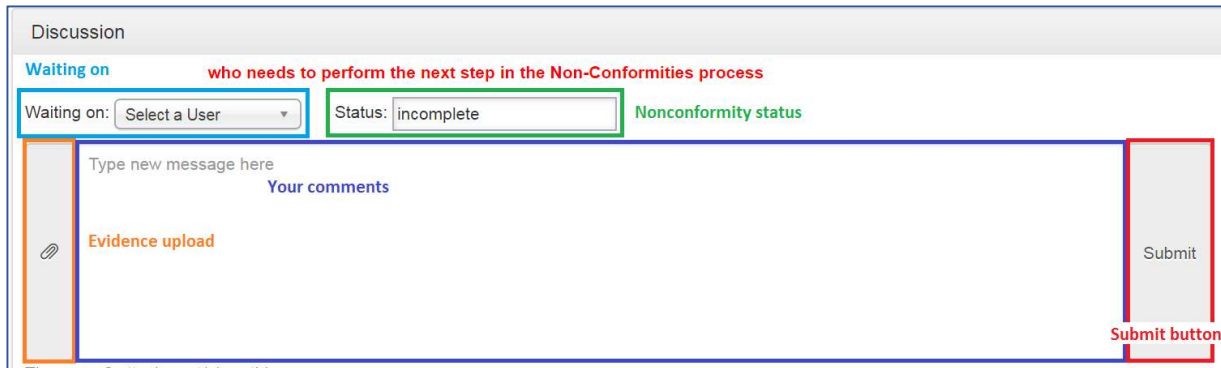
Waiting on:  Status:

Type new message here

Submit

There are 0 attachment(s) on this message.

Below you will find a short description of all buttons appearing in the "Discussion" part of the Panel.



Discussion

Waiting on **who needs to perform the next step in the Non-Conformities process**

Waiting on:  Status:  Nonconformity status

Type new message here

Your comments

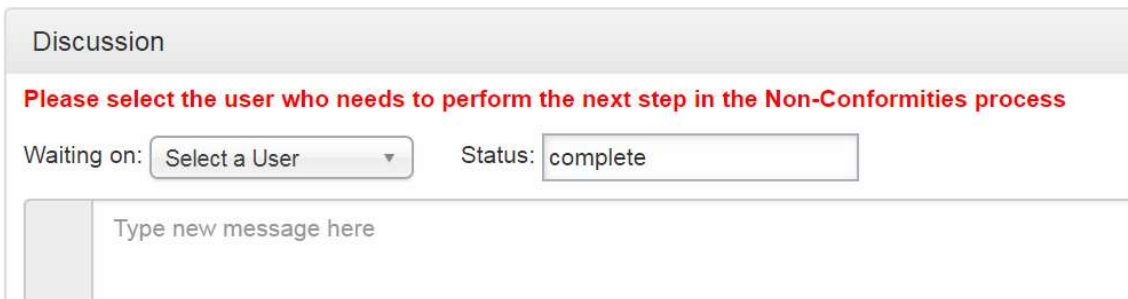
Evidence upload

Submit

Submit button

**Waiting on** – before you can submit anything, you need to ensure that the Auditor is selected, in the "Waiting on" pull-down, **if you do not select the Auditor, your Corrective Actions response will not be moved on for closure.**

**Nonconformity status** – the current state of nonconformity (incomplete or complete). Once nonconformity is closed, the status will be automatically updated.



Discussion

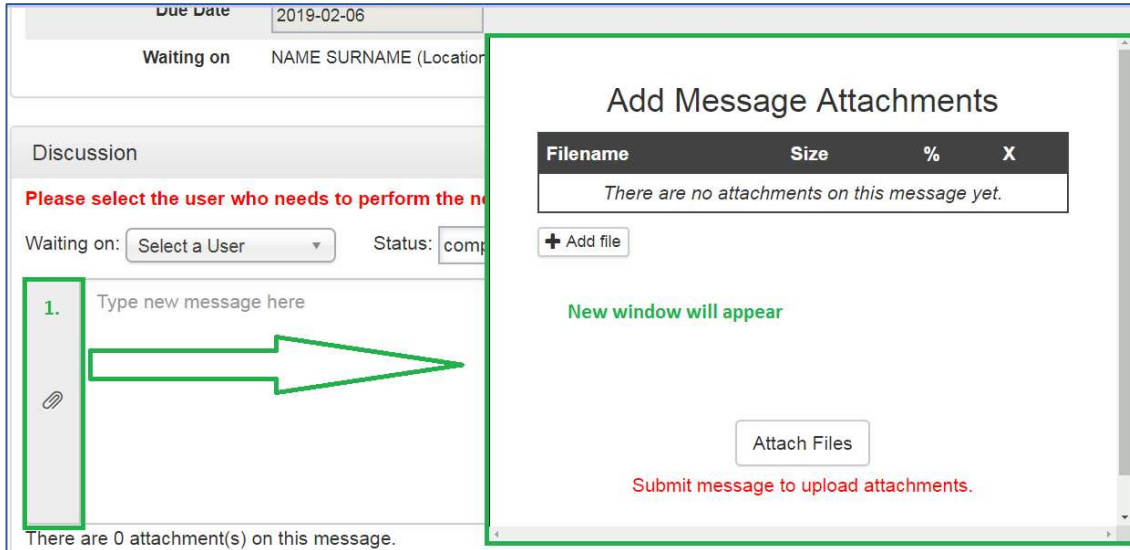
Please select the user who needs to perform the next step in the Non-Conformities process

Waiting on:  Status:

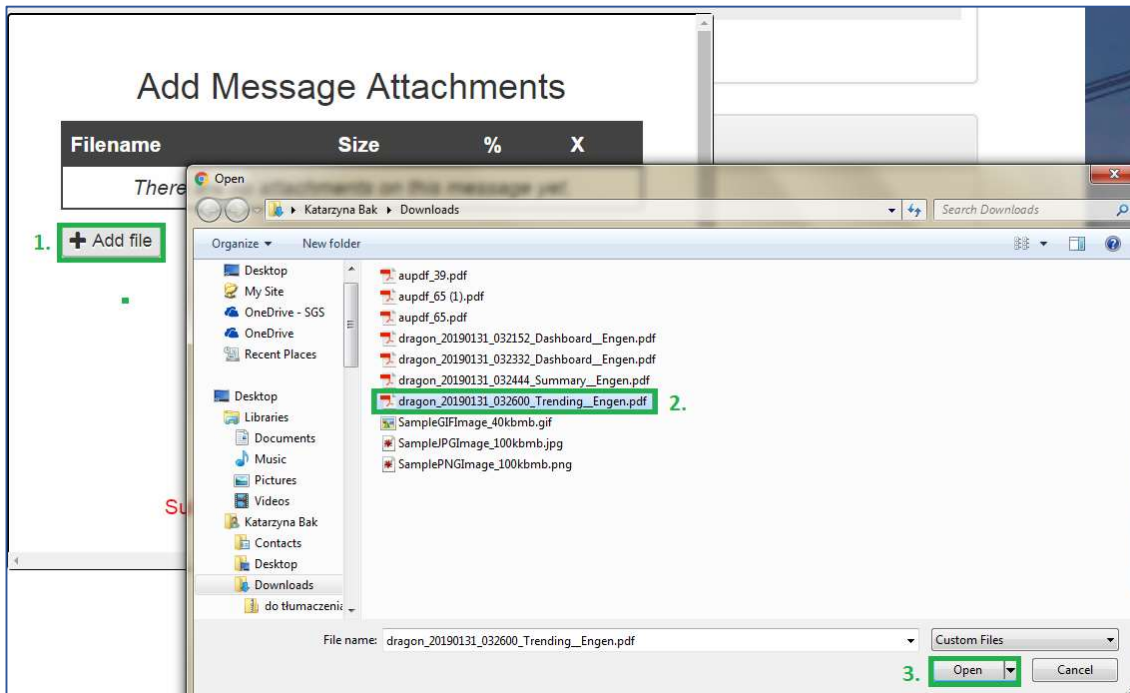
Type new message here

**Your comments** – you can type your answer inside this comment box. All data added there will be sent to the Auditor which you pick in the "Waiting on" pull-down. The Auditor will receive a notification of your answer, **so check your comments carefully before submitting them.**

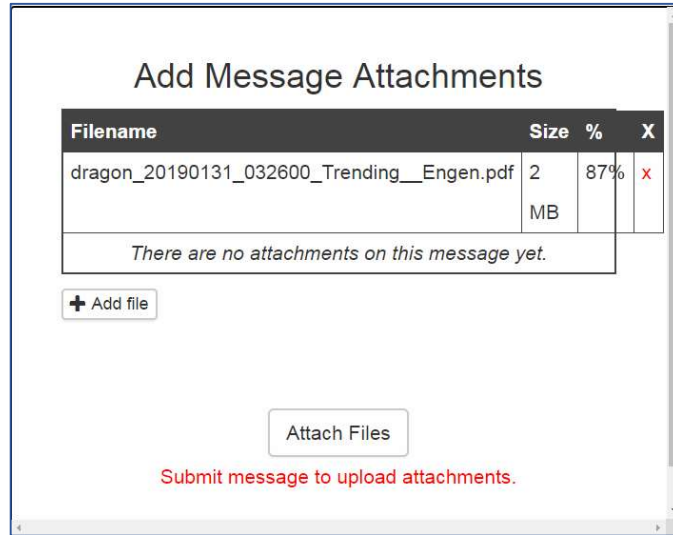
**Evidence upload** – clicking on this button will allow you to add attachments, which will be sent to the Auditor which you pick in the "Waiting on" pull-down. You can add pictures and PDF files only, so if you need to add a Word file or Excel file, then you need to PDF it and add as .pdf file.



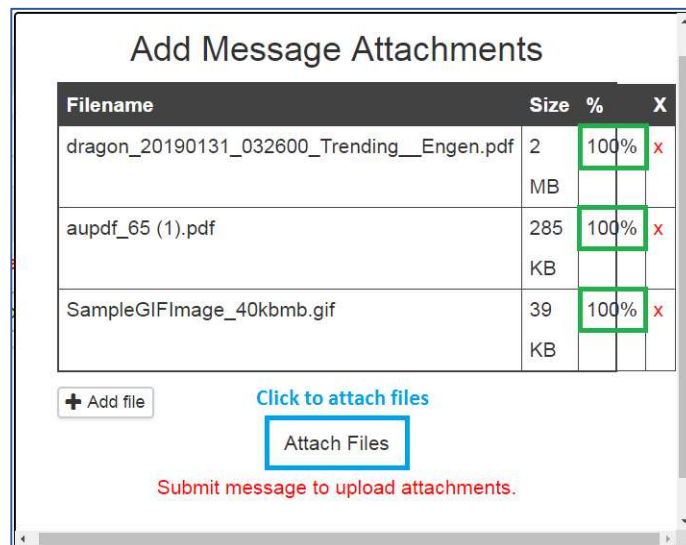
In the new window, click on the "+ Add files" and pick the correct file through your Windows Explorer.



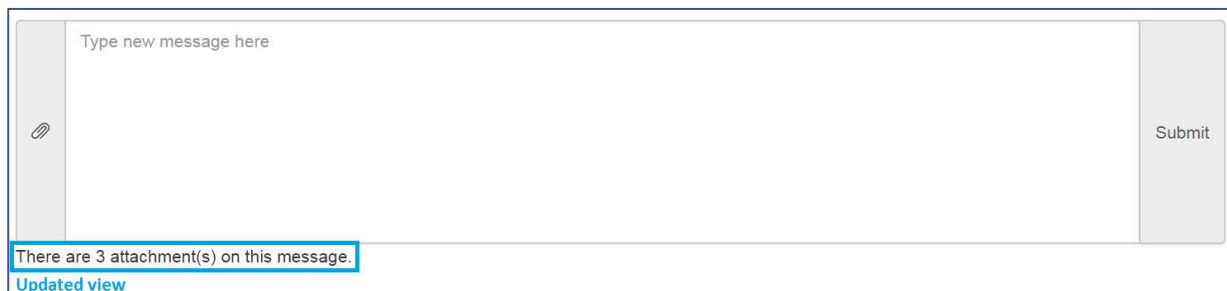
Once you find the correct file, click on the "Open".



You can attach multiple files. Once the file will load (the "%" will show 100) click on the "Attach Files".



Once the files are attached, the "Discussion" part of panel will show a note confirming the amount of attachments added to your reply.



**Submit button** – once you attach all required files, add your comment and pick the "Waiting on" and click on the "Submit" to send the answer to the Auditor in the "Waiting on" pull-down.

When you submit the answer, you will see miniatures of the attached files:

**NAME SURNAME (Location Manager)** 2019-02-04 09:38:33

 dragon\_20190131\_032600\_Trending\_\_Engen.pdf

 aupdf\_65 (1).pdf

 SampleGIFImage\_40kbmb.gif

**NOTE: Remember to pick the Auditor in "Waiting on" pull-down, skipping this step will not let you submit your comments as well as notify the next person who needs to perform the action!**

The Discussion Panel is showing details of only one nonconformity, so you need to follow the above process for each of the nonconformities raised.