	REGULATION AND PREQUALIFICATION DEPARTMENT
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Guidance	
Guidance on the ePQS Portal and Key Features	
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Guidance on the ePQS Portal and Key Features

Version Control

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Related Resources

Please also refer to

Guidance on the ePQS Portal and Key Features

The ePQS Portal is the external user facing Salesforce Community site of the ePQS system. It allows selective visibility of records relevant to the user, the creation of applications, uploading and downloading of documents, and to receive alerts for pending tasks.

Users must register to use the portal.

An introduction to features of the portal are described in this document. More detailed guidance documents are available to describe specific features and ePQS Portal processes.
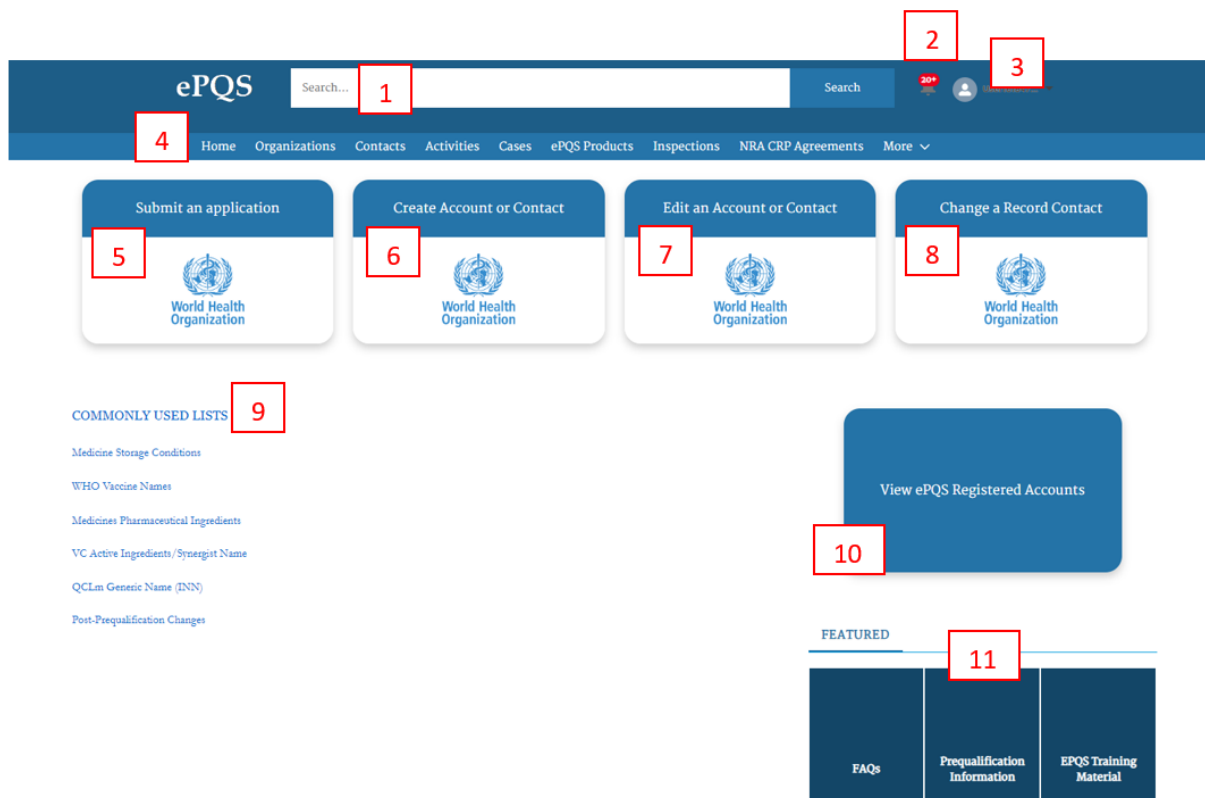
Home Page

Figure 1: Features of the PQS Portal landing page

The Portal landing page offers the following features.

1) Global search facility

Key word searches will retrieve any record matching the entered criteria, provided the user has access to the record.

2) Notification "Bell" Icon

System generated notifications will be recorded here.

3) Personal Settings and Profile

Using this menu you can access your personal user details and log out of the system.

4) Object Menu Bar

List views of the major record types can be accessed from this menu. The menu items will vary depending on the type of external user.

5) Application wizard

This initiates the creation of a new application

6 to 8) Contacts and Accounts

These menu items download the relevant forms for completion.

9) Commonly Used Lists

These links provide access to a series of reference lists that are referred to at various points of some application wizards.

For instance, as part of the FVP application wizard the applicant will be asked to nominate a WHO Vaccine Name. If the applicant is unfamiliar with the possible WHO Vaccine Names, they can review these from this list.

Figure 2: Features of the PQS Portal landing page

10) View ePQS Registered Accounts

Account (Organisation) records are important records referred to on product, application, inspection and product site records.

During the wizard process, if an account is not present in the ePQS database, it will not be possible, for instance, to create a manufacturing site (Product Site) for a product. The wizard application can always be saved in draft, but this list can be used by prospective applicants to verify the account already exists in the system, prior to commencing the application. If the account does not exist then a request can be made to create this.

11) FAQ and training materials

Relevant reference materials and information will be made available via these links.

List views

For each Object Menu item, lists of relevant records will be presented by the system.

As indicated in Figure 3, by clicking the downward triangle (1) the user can access different list views (2). These list views differ either by some filter criteria or the fields being displayed.

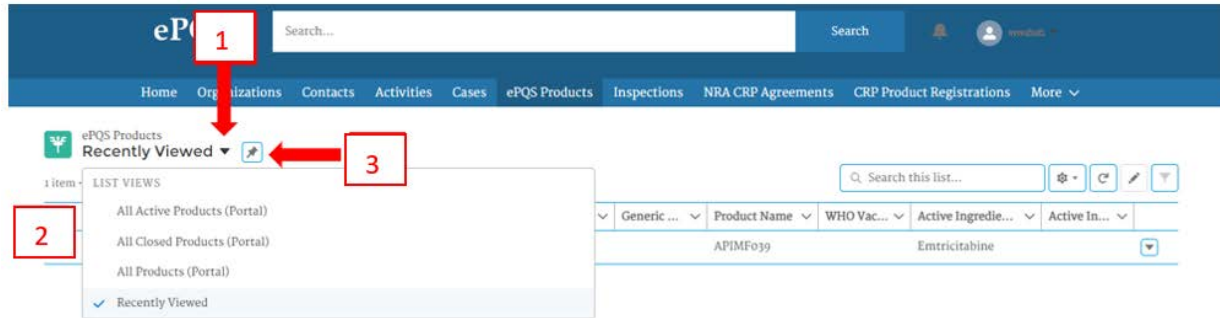A favourite list view can be pinned by pressing the pin icon (3).

Figure 3: Using List views

Record features

Most records have a common layout.

Using the example of an application (case record), seven features have been highlighted in in figure 4 below.
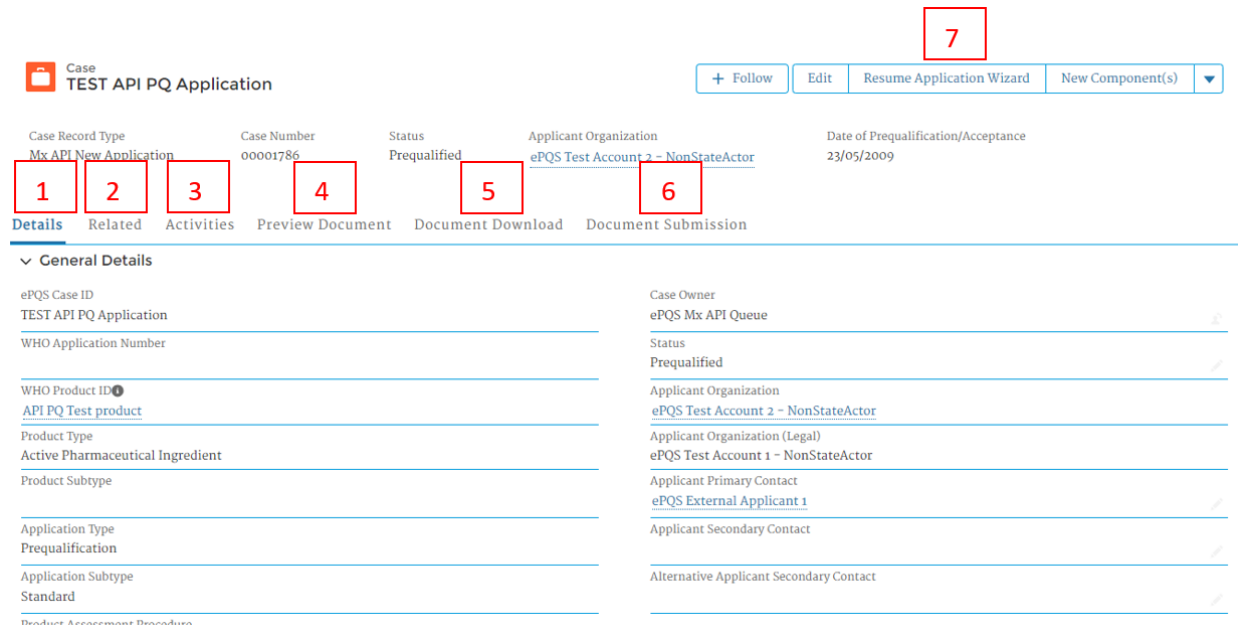

Figure 4: 7 features typical of most types of records, using the example of an application

Details tab (1)

Here general information regarding the record will be displayed. Some fields will be hidden from external users.

Generally speaking, unless the record is in Draft (that is, not yet submitted via the wizard) the external user cannot change the field values.

Related Tab(2)

On this tab will be a series of lists of records related to the selected record. For instance, if a product record is selected, the user would see on this tab any related applications for which the user has access that are related to the product.

Activities (3)

On Case and Inspections records there will be a tab called Activity. Here the user will find a list of activities that have been assigned to the user or any user who belongs to the same Account as the user.

Preview Documents (4)

From this tab the external user will see any documents to which they have read access

Document Download (5)

From this tab the external user will be able to download any documents to which they have access

Document Submission (6)

From this tab the external user will be able to upload any documents related to the record. For instance, in response to questions raised.

Resume wizard Button (7)

On application records only, applicants can resume the application wizard process on draft applications by selecting this button.