



The quality system your team actually wants to use.

User Workbook

Provetta Quality Management — every process, step by step

First edition · August 2026 · Covers Provetta as deployed at provetta.ai on August 10, 2026

ISO 9001 · ISO 13485 · 21 CFR Part 11 ready

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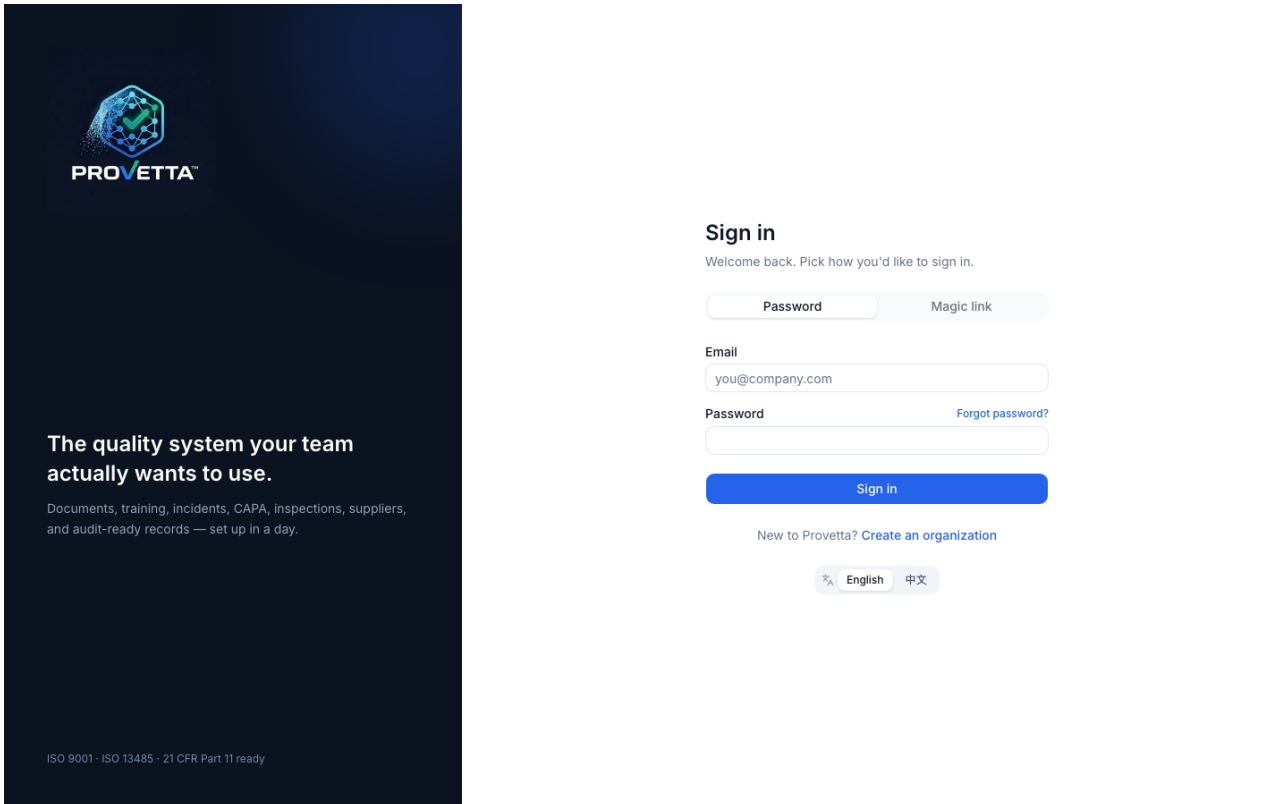
Welcome

Provetta runs your quality system: documents people actually sign, inspections with evidence attached, incidents that become investigations that become corrective actions that get checked, suppliers you can defend to an auditor, and training you can prove. Everything leaves a permanent trail, nothing is ever quietly deleted, and the AI drafts while your people decide.

This workbook is organized by role. Find your track in the contents, follow the steps, and compare your screen to the pictures — they were taken in a real Provetta organization, not mocked up. Ten minutes in your track is enough to work confidently; the reference appendices cover the rest when you need them.

Signing in and finding your way

Sign in at **provetta.ai** with your work email. Forgot your password? The reset link on the sign-in screen emails you a new one. An expired invite link just needs re-sending — ask whoever invited you.



PROVETTA™

The quality system your team actually wants to use.

Documents, training, incidents, CAPA, inspections, suppliers, and audit-ready records — set up in a day.

ISO 9001 · ISO 13485 · 21 CFR Part 11 ready

Sign in

Welcome back. Pick how you'd like to sign in.

Password Magic link

Email
you@company.com

Password [Forgot password?](#)

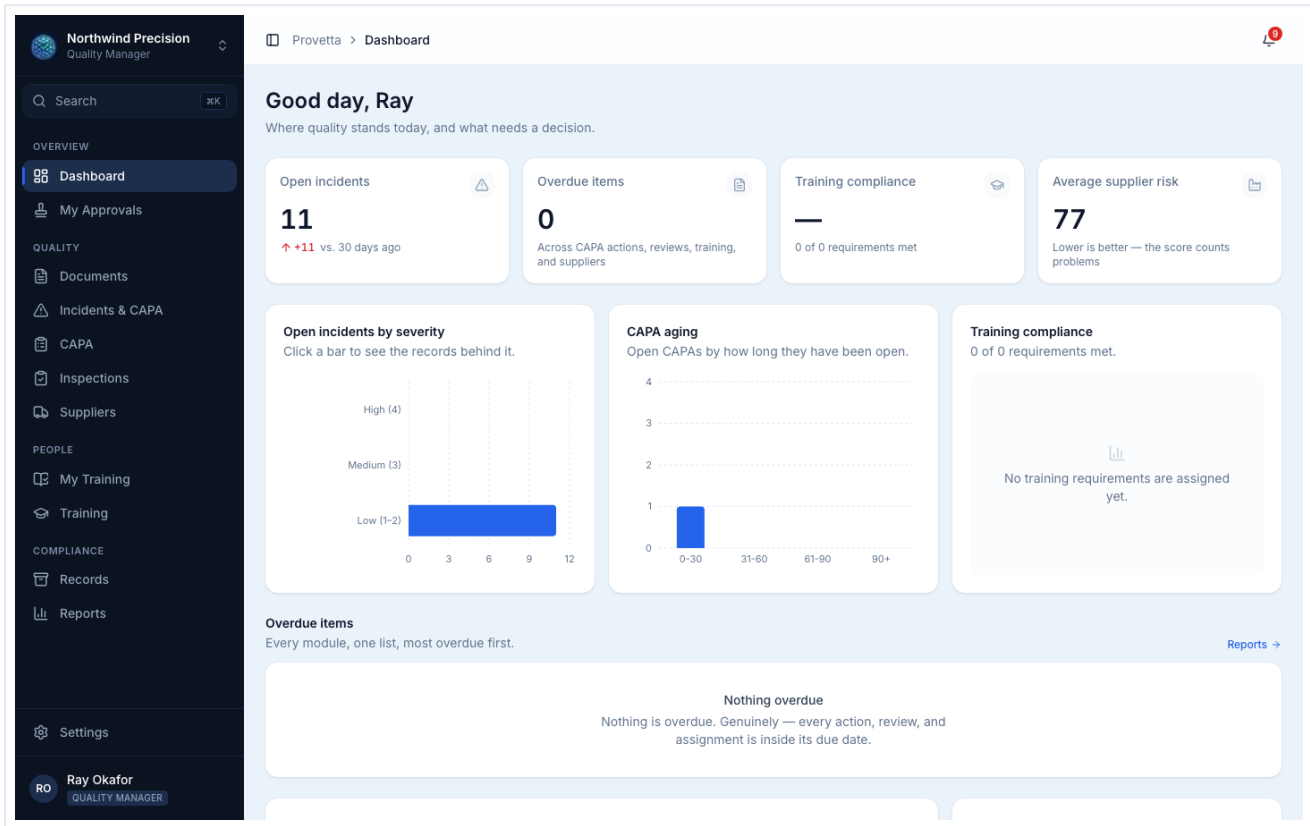
Sign in

New to Provetta? [Create an organization](#)

English 中文

The sign-in screen

Inside, the dark sidebar is home: your organization at the top, the modules grouped under OVERVIEW, QUALITY, PEOPLE, and COMPLIANCE, and your own account menu at the bottom. Press **Ctrl+K** (**Cmd+K** on a Mac) anywhere to search everything. The bell shows what needs you.



The app shell — sidebar, modules, search, and your account

Three ideas that make Provetta different

- **The trail is permanent.** Every create, change, and status move is recorded, attributed, and kept. Records are archived or voided, never erased — an audit trail with holes is not an audit trail.
- **Signatures mean something.** Signing re-asks for your password with the signature's stated meaning in front of you, then locks the record with a cryptographic fingerprint. What was signed is provably what you see.
- **The AI drafts; people decide.** Suggestions can always be dismissed in one click. Accepting one records who accepted it and what they changed. No AI can sign, and nothing applies itself.

Contents

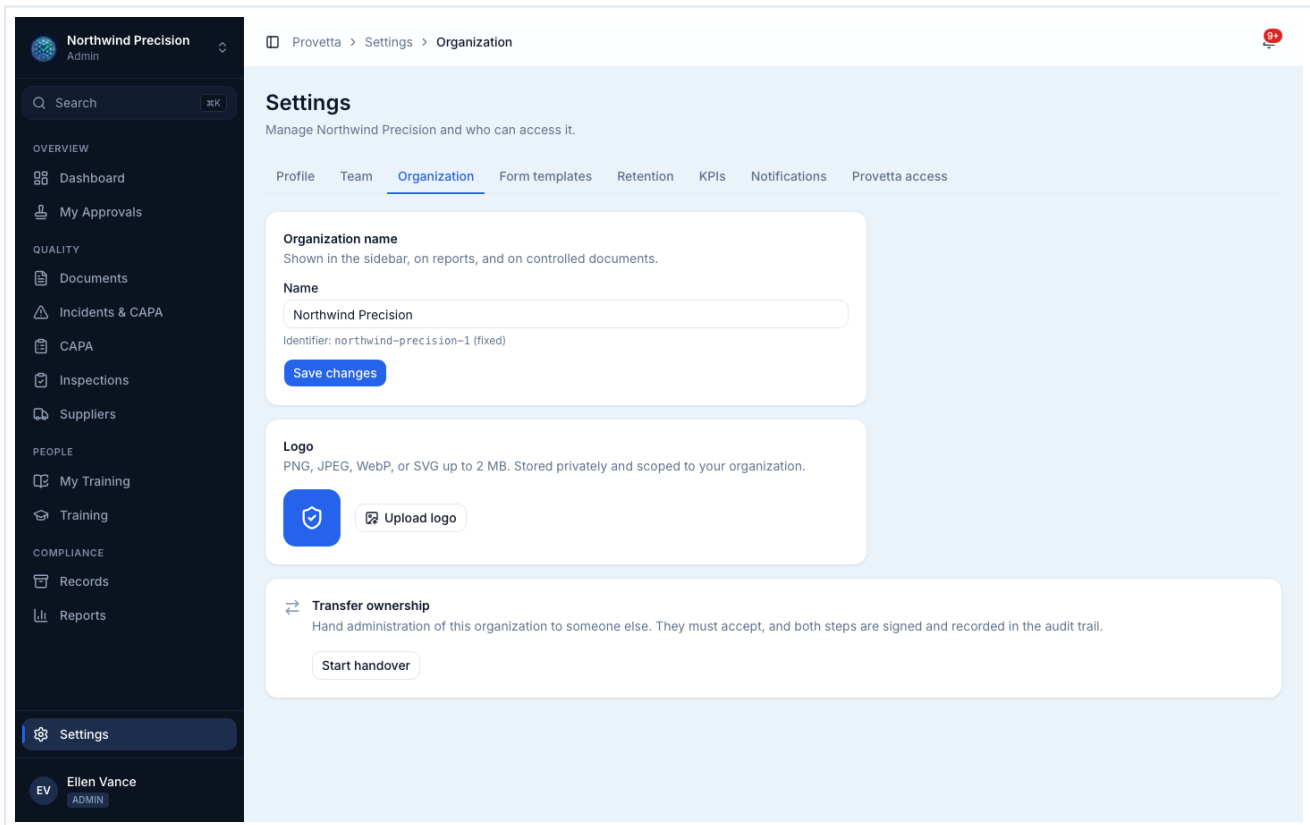
Welcome	3
Signing in and finding your way	3
Three ideas that make Provetta different	4
Contents	5
Track A — The Administrator's Workbook	7
A1. Organization settings	7
A2. Your team: inviting, roles, deactivating	7
A3. Quick Report: reporting without a login	9
A4. Form templates	11
A5. KPIs and notifications	12
A6. Retention and legal holds	12
A7. Support access — who besides you can see your org	13
A8. Transferring ownership	14
Track B — The Quality Manager's Workbook	15
B1. Your dashboard	15
B2. Document control, end to end	15
B3. Incidents: from report to triage	17
B4. Investigation and CAPA	20
B5. Inspections	23
B6. Suppliers	25
B7. Training	27
B8. Records, retention, and audit binders	28
B9. Reports and management review	29
B10. The approvals queue	30
Track C — The Supervisor & Employee Workbook	32
C1. Your dashboard	32
C2. Reporting an incident	32
C3. Reporting from your phone — Quick Report	33
C4. Running an inspection	35

C5. Your training	37
C6. Supervisors: your approvals queue	38
Track D — The External Inspector's Workbook	40
D1. Accepting your invitation	40
D2. Signing in and choosing your language	40
D3. My Inspections	41
D4. Running a Pre-Ship Inspection	42
D5. Submitting and signing	43
D6. Reporting an issue beyond the checklist	44
D7. What you can and cannot see — stated plainly	44
Track E — The Auditor's Workbook	45
E1. What read-only means here	45
E2. Reading an audit trail	45
E3. Verifying signatures	46
E4. The records registry and retention	46
E5. Audit binders	47
E6. Exports	48
Appendix 1 — Working with AI suggestions (all roles)	49
Appendix 2 — Reference	51
Record ID prefixes	51
Status colors, everywhere	51
Keyboard	51
Support access	51

Track A — The Administrator's Workbook

You set the organization up and keep its doors in order: who's in, what they can do, and how the fixed machinery — templates, retention, quick reporting — is configured. This track is short on ceremony because most of it you do once.

A1. Organization settings



Org settings page

Settings → **Organization** holds the name and identity your team sees. Changes here are audited like everything else.

A2. Your team: inviting, roles, deactivating

A2.1 The five roles, in one table

Role	What they can do
Admin	Everything, including settings, invites, and role changes.
Quality Manager	Runs the quality system: approvals, signatures, triage, CAPAs, suppliers, training administration. Cannot invite users or change org settings.

Role	What they can do
Supervisor	Approves within their area; can be scoped to a department.
Employee	Reports incidents, runs assigned inspections, completes training, acknowledges documents.
Auditor	Sees everything, changes nothing.

A sixth, special-purpose role — External Inspector — exists for third parties who run assigned inspections only; it's covered in Track D.

A2.2 Inviting someone

1. **Settings** → **Team** → **Invite**. Enter their email and pick the role.
2. They receive a link; accepting it creates their account and lands them in your org. Invites can be revoked while pending.

The screenshot shows the 'Settings' page for 'Northwind Precision Admin'. The 'Team' tab is selected, showing a list of 5 members. The breadcrumb navigation is 'Provetta > Settings > Team'. The page title is 'Settings' with the subtitle 'Manage Northwind Precision and who can access it.' Below the title are tabs for 'Profile', 'Team' (selected), 'Organization', 'Form templates', 'Retention', 'KPIs', 'Notifications', and 'Provetta access'. A '+ Invite member' button is in the top right. The members table has columns: Name, Email, Role, Reads, Status, and Joined. The members listed are Dale Ferreira (Supervisor), Ellen Vance (Admin), Nina Patel (Employee), Priya Raman (Auditor), and Ray Okafor (Quality Manager). All are 'Active'.

Name	Email	Role	Reads	Status	Joined
Dale Ferreira	demo-supervisor2@provettahq.com	Supervisor	All departments	Active	Aug 8, 2026
Ellen Vance	demo-admin2@provettahq.com	Admin	Org-wide	Active	Aug 6, 2026
Nina Patel	demo-operator2@provettahq.com	Employee	Org-wide	Active	Aug 6, 2026
Priya Raman	demo-auditor2@provettahq.com	Auditor	Org-wide	Active	Aug 8, 2026
Ray Okafor	demo-quality2@provettahq.com	Quality Manager	Org-wide	Active	Aug 6, 2026

Team list showing the five-role roster

A2.3 Changing a role, deactivating a member

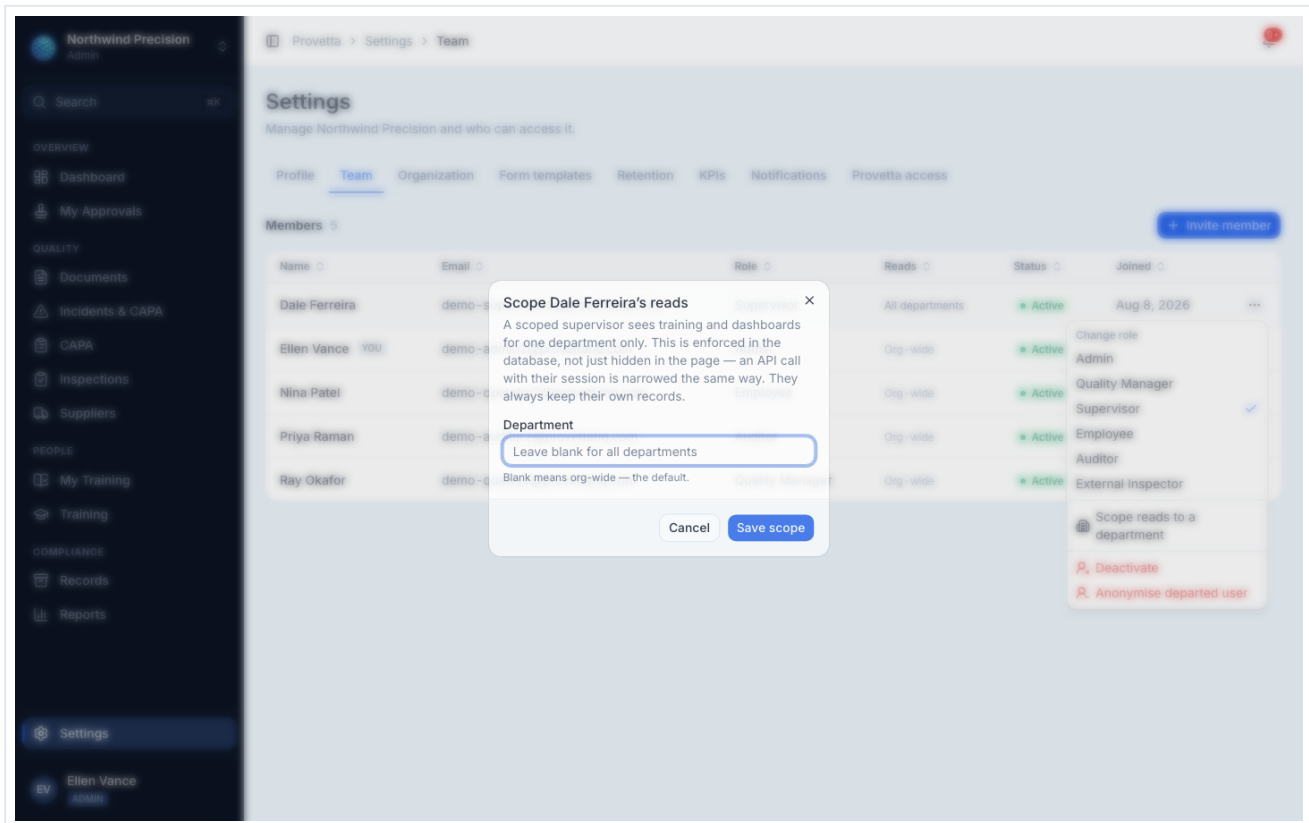
Both from the member's row menu. Deactivation takes effect immediately — it is enforced by the database, not by hiding buttons. Two protections you'll meet:

- **You cannot remove the last admin.** The system refuses; an organization without an admin is locked out of its own settings.

- **Departed users are deactivated, never deleted.** Their name stays on every record they touched — an audit trail with holes is not an audit trail.

A2.4 Scoping a supervisor to a department

The **Reads** column on the team page shows each supervisor's access scope. "All departments" means unrestricted; **Scope reads to a department** (row menu) restricts what they can see, enforced at the database layer. This is an access boundary, not a label — the dialog says so, and it means it.



Scope dialog open

A3. Quick Report: reporting without a login

1. **Settings** → **Quick Report** → **New posting**. A posting is a QR code tied to a location or area.
2. Print the poster (.../poster) and put it where the work happens.
3. Anyone who scans it can file an incident from their phone — no account needed. The form is a three-step wizard in plain language (pick what happened from five worker-worded choices → describe it → photos and submit), it shows the site's name on every step so the reporter knows where the report lands, and the name field is explicitly optional: *"Anonymous reports are taken just as seriously."* Submissions land in the triage queue like any other incident, marked with their source.

Northwind Precision

Admin

Search

⌕

OVERVIEW

Dashboard

My Approvals

QUALITY

Documents

Incidents & CAPA

CAPA

Inspections

Suppliers

PEOPLE

My Training

Training

COMPLIANCE

Records

Reports

Settings

EV

Ellen Vance

ADMIN

Provetta > Settings > Quick Report

Settings

Manage Northwind Precision and who can access it.

Profile

Team

Organization

Form templates

Retention

KPIs

Notifications

Provetta access

Quick report

+ New site

CNC Cell — Line 2

• Live

Reports default to "Bay 2, west aisle"

PUBLIC LINK

/r/northwind-precision-1/meqtpuvhtdptkpc5e5xxm2a

Copy link

Poster

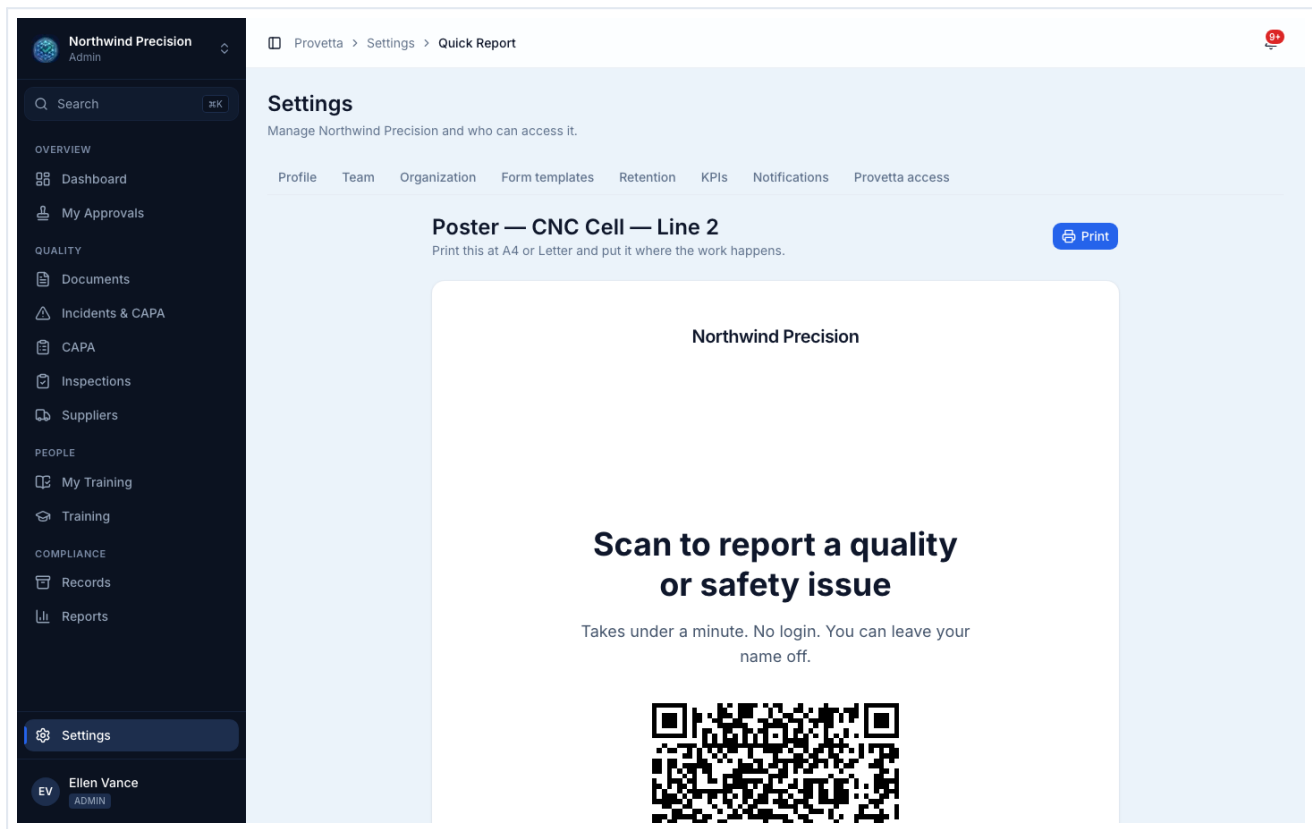
New link

Created Aug 8, 2026

Postings list

Provetta User Workbook

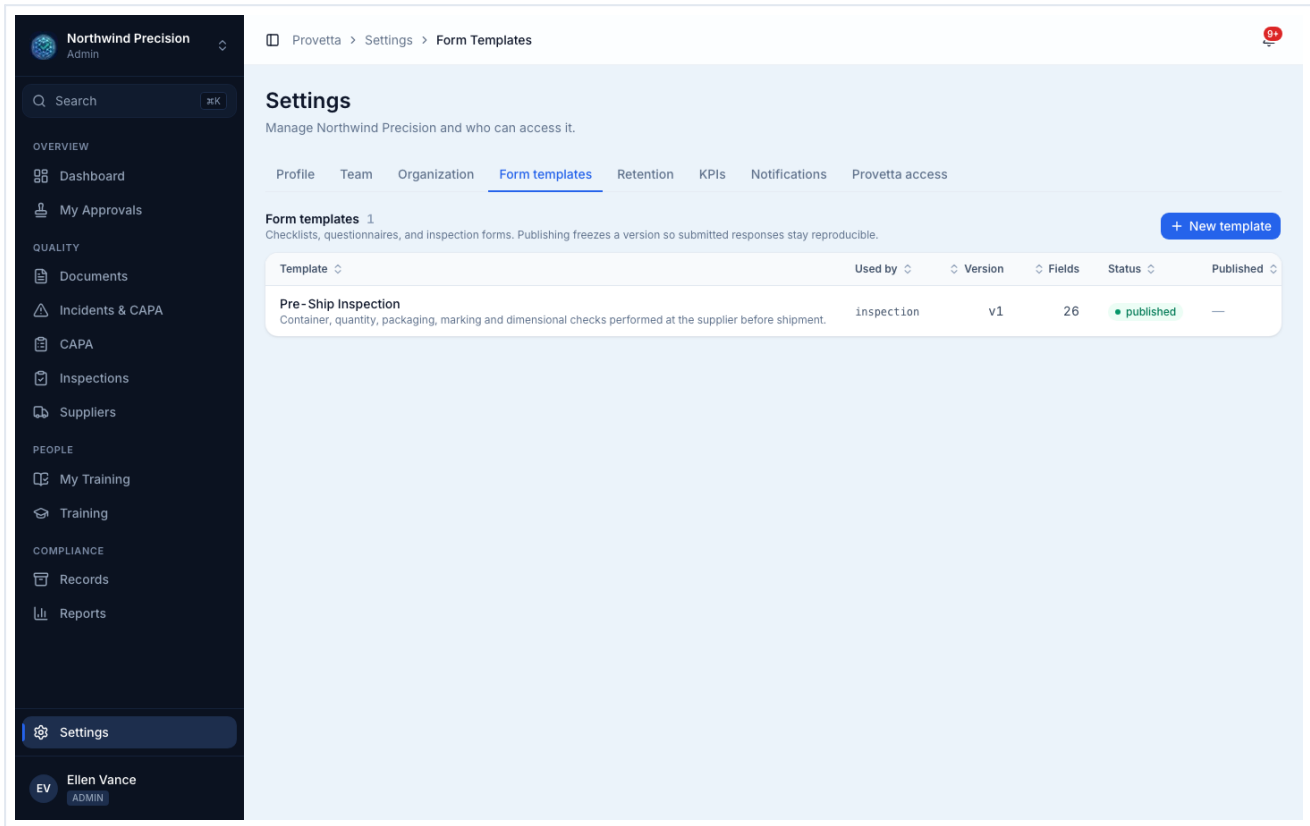
10



The printable poster

A4. Form templates

Inspection checklists are built here: sections, field types (text, number, select, photo, signature), required-photo rules. Templates version — a checklist in use is never edited underneath its inspections.



Template editor

A5. KPIs and notifications

Settings → **KPIs** selects what the dashboard leads with. **Settings** → **Notifications** sets email preferences per event type — approvals waiting, assignments, overdue items.

A6. Retention and legal holds

Settings → **Retention** sets how long each record type is kept past closure. The Records registry flags what's past its period; nothing is deleted automatically — archiving is always a deliberate act. **Legal holds** freeze a record type against archiving entirely.

Northwind Precision

Admin

Provetta > Settings > Retention

09

Search

KK

OVERVIEW

Dashboard

My Approvals

QUALITY

Documents

Incidents & CAPA

CAPA

Inspections

Suppliers

PEOPLE

My Training

Training

COMPLIANCE

Records

Reports

Settings

EV Ellen Vance ADMIN

Settings

Manage Northwind Precision and who can access it.

Profile

Team

Organization

Form templates

Retention

KPIs

Notifications

Provetta access

Retention policies

How long each kind of record must be kept, and when the clock starts.

Retention marks records eligible for archive — it never deletes anything. Nothing in this system removes a record on a schedule; the expiry date is a prompt for a decision a person makes. The suggested periods below are common practice, not legal advice.

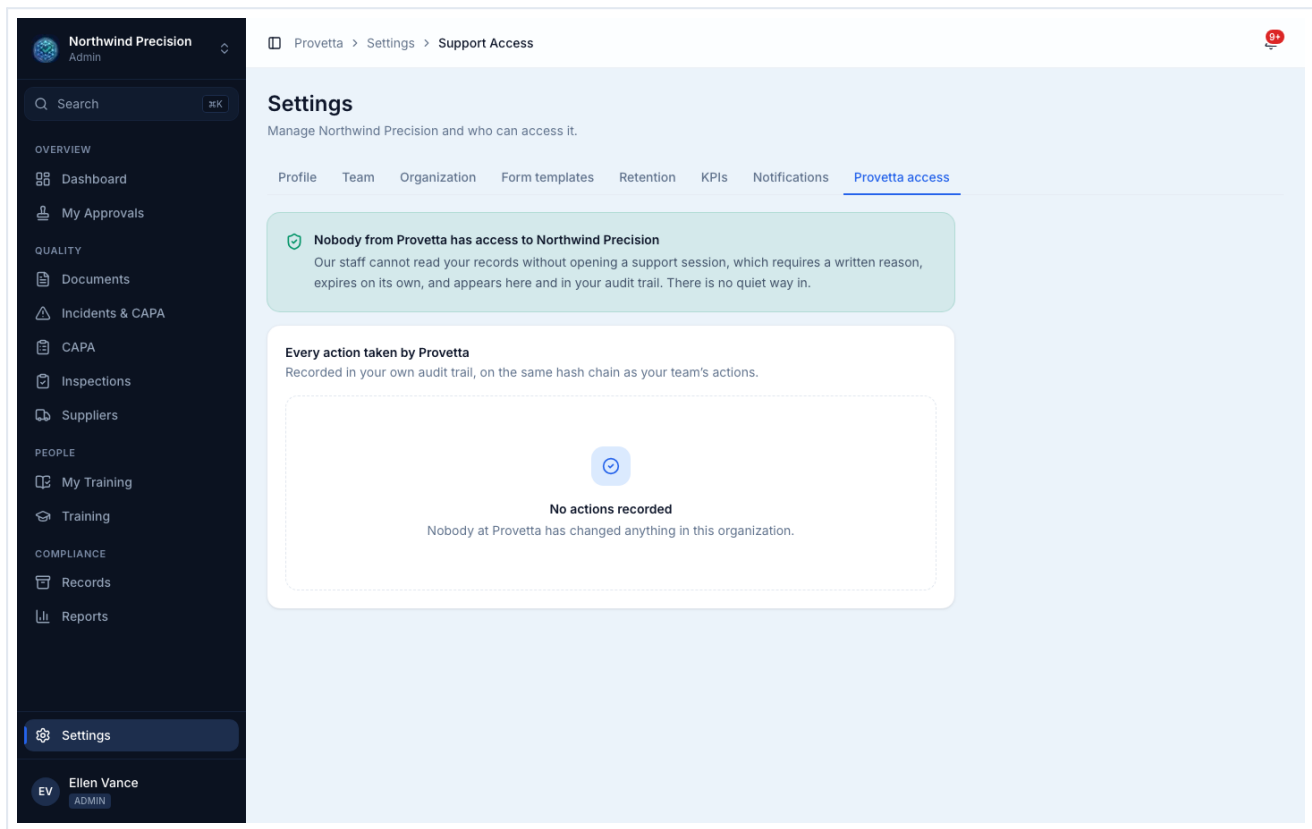
RECORD TYPE	POLICY	KEEP	CLOCK STARTS	RECORDS	
Document	Controlled documents Obsolete revisions stay retrievable for the life of the products they governed.	10 yr	From creation	6	Edit
Incident	Incidents and non-conformances Five years from closure, matching the OSHA 300 log retention rule.	5 yr	From closure	13	Edit
CAPA	Corrective and preventive actions Kept longer than the incident so effectiveness history outlives it.	7 yr	From closure	2	Edit
Inspection	Inspection records Three years, or the life of the lot, whichever the customer asks for.	3 yr	From creation	2	Edit
SCAR	Supplier corrective actions Matched to the incident retention they usually arise from.	5 yr	From closure	0	Edit
Supplier	Supplier files Approval evidence has to outlast the last shipment, so the clock runs from creation.	7 yr	From creation	2	Edit
Training record	Training records Three years past completion. Employment-plus-three is the common rule; this system does not know termination dates.	3 yr	From closure	0	Edit
Management review	Management review outputs ISO 9001 §9.3.3 requires the output be retained. Ten years, because a review is read against the ones before it.	10 yr	From creation	0	Edit

Retention policy list

A7. Support access — who besides you can see your org

Settings → **Support access** shows every time Provetta support has had access to your organization: who, when, why, and until when. Access is time-boxed (24 hours, non-renewable without a new grant) and everything done under it is written to your audit trail, attributed to the support operator by name.

You can revoke an active grant from this page. If this page is empty, nobody outside your team has ever had access.



Access history, revoke visible

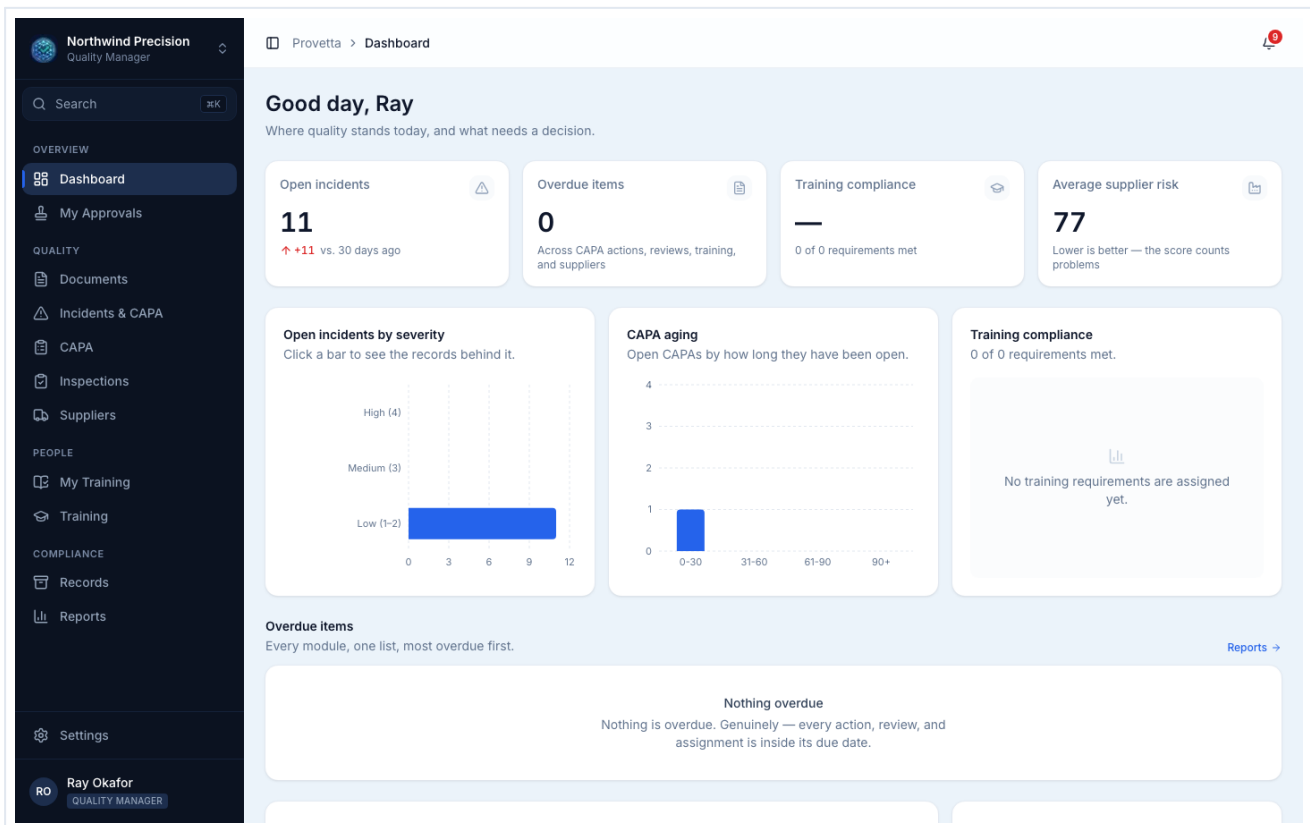
A8. Transferring ownership

Handing the org to a new owner is a two-step signed flow — the current owner initiates and signs, the new owner accepts and signs. Both signatures are permanent records. Start it from **Settings** → **Organization**.

Track B — The Quality Manager's Workbook

You run the quality system. This track walks every process you own, in the order a working day meets them. Steps say exactly what to click; screenshots show exactly what you should see.

B1. Your dashboard



Full dashboard with KPI cards

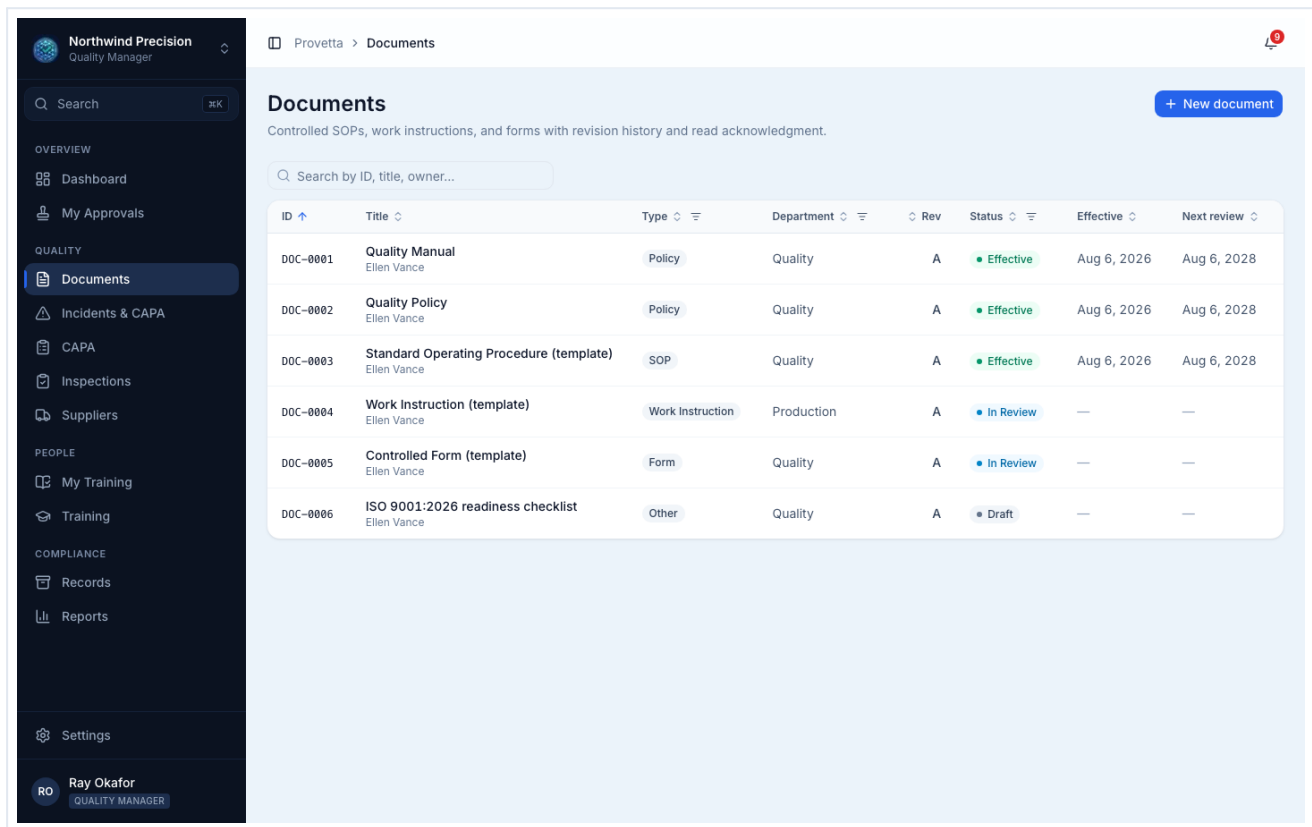
The dashboard is your morning view: KPI cards across the top (open incidents, overdue CAPAs, documents awaiting review, training compliance), then the work that needs a decision. Every number is a link — click through to the filtered list behind it.

Do this now: click any KPI card and notice the list it opens is already filtered to exactly what the number counted. That is true everywhere in Provetta.

B2. Document control, end to end

B2.1 The lifecycle in one picture

Every controlled document moves through the same states: **Draft** → **In review** → **Approved** → **Effective**, with **Obsolete** at end of life. One revision is effective at a time; prior revisions stay readable forever.



Register showing documents in mixed states

B2.2 Creating a document

1. **Documents** → **New document** (top right).
2. Give it a title, type, and (optionally) a department. The ID (DOC-nnnn) is assigned by the system — you never choose it.
3. Attach or write the content, then save. It sits in **Draft**: editable, deletable, invisible to routine users.

B2.3 Sending for review and approving with an e-signature

1. Open the document → **Send for review**. Status moves to **In review**.
2. When review is done, click **Approve**. This is a signed step: the **Electronic signature** dialog names the record, states the meaning of the signature (**Approved**), asks you to **re-enter your password**, and offers an optional comment. Your signature is recorded with a cryptographic hash of exactly what you approved.
3. [SHOT-B2-02 | demo-quality2 | /documents/<id> | Signature dialog open: password field + meaning selector]
4. Approved documents then become **Effective** — from that moment it is the controlled copy.

Why the password again? A signature in Provetta is legally meaningful (Part-11 style). Re-entering your password proves it was you, at this moment, for this content. Signed records lock — that is a feature, not an inconvenience.

B2.4 Acknowledgments

Require your team to confirm they've read a document: assign read acknowledgments and track who has signed off. Overdue acknowledgments appear on the dashboard and in the training reading list.

The screenshot displays the Provetta Quality Manager interface. On the left is a dark sidebar with navigation options: Overview (Dashboard, My Approvals), Quality (Documents, Incidents & CAPA, CAPA, Inspections, Suppliers), and People (My Training, Training). The main content area shows the 'Work Instruction (template)' document. At the top right are 'Send back' and 'Approve' buttons. Below the document title is a breadcrumb trail: 'Provetta > Documents > Record'. The document ID is 'DOC-0004' and it's 'Revision A' in 'Review' status. A tab bar includes 'Overview', 'Revisions 1', 'Read & Acknowledge', 'Change Requests', 'Audit Trail', and 'Signatures'. The 'Read & Acknowledge' tab is active, showing a section 'Who must read this' with the text: 'Rules are applied whenever a revision becomes effective, so a new revision reassigns everyone in scope.' Below this is a table with columns 'Scope' and 'Value'. The 'Scope' column has a dropdown menu with 'Role' selected. The 'Value' column has a dropdown menu with 'Employee' selected. A '+ Add rule' button is to the right. Below the table is a message: 'No effective revision yet' with a subtext: 'Read assignments are created when a revision becomes effective.'

Acknowledgments panel with completion status

B2.5 Revising

A new revision starts in Draft and walks the same lifecycle. The old revision stays effective until the new one is approved — there is never a gap and never two effective revisions. The system enforces this; you don't have to think about it.

B2.6 The starter pack

New organizations arrive with an ISO-formatted starter set: Quality Manual, Quality Policy, SOP / Work Instruction / Controlled Form templates, and the **ISO 9001:2026 readiness checklist**. Use them as skeletons — they walk the same lifecycle as everything else.

B3. Incidents: from report to triage

B3.1 Where incidents come from

Three doors, one register:

- **The app** — anyone on the team, via **Incidents & CAPA** → **Report**.
- **Quick Report** — anyone on the floor with a phone, via the QR poster. No login, photos included.
- **External inspectors** — issues raised during a pre-ship inspection.

All three land in the same place with the same numbering (NCR-, SAF-, NM-, CMP-, DEV- prefixes by type).

B3.2 The triage queue

Northwind Precision
Quality Manager

Provetta > Incidents & CAPA > Triage

Triage
9 incidents waiting on an assessment.

NCR-2026-0005 • In Triage Nonconformance
Goods-in inspection not recorded for an incoming shipment
Ray Okafor · 2 days ago · Goods-in

Incident Triage suggests 2 days ago
Uninspected material was drawn into production, risking undetected nonconforming stock in a job, but no closely similar past incidents indicate a recurring pattern.

SEVERITY 3 · Serious **LIKELIHOOD** 2 · Unlikely **Medium**

SIMILAR PAST INCIDENTS
NM-2026-0001 Stillage stacked above the rack line at goods-in (59% similar)
NCR-2026-0002 Burrs left on the housing bore edge (49% similar)
DEV-2026-0002 Bore gauge past its calibration due date (48% similar)

DRAFTED CONTAINMENT
☐ Quarantine remaining bar stock from the shipment and remove it from the racks.
☐ Identify and halt work on the job that drew the uninspected material pending inspection.
☐ Notify the quality manager and production supervisor of the affected job and material.
☐ Perform goods-in inspection on the retained material and record the results before release.
Ticked steps are created as containment actions on this incident.

RISK ASSESSMENT

	Critical	Serious	Minor	Noncritical
SEVERITY				

Card layout, several incidents waiting

In the sidebar under **QUALITY**, **Incidents & CAPA** → **Triage**. The page is headed **Triage** — "incidents waiting on an assessment" — with card and table views. Each card shows what happened, who reported it, and — when the AI has assessed it — a suggestion panel, with the risk-assessment grid beneath.

B3.3 The AI triage card

The screenshot displays the 'Triage' interface for incident NCR-2026-0005. The incident title is 'Goods-in inspection not recorded for an incoming shipment' by Ray Okafor, reported 2 days ago. The 'Incident Triage suggests' panel provides a reasoning statement: 'Uninspected material was drawn into production, risking undetected nonconforming stock in a job, but no closely similar past incidents indicate a recurring pattern.' Below this, the severity is set to '3 - Serious' and likelihood to '2 - Unlikely', resulting in a 'Medium' priority. The 'SIMILAR PAST INCIDENTS' section lists three related incidents with their similarity percentages: NCR-2026-0001 (59% similar), NCR-2026-0002 (49% similar), and DEV-2026-0002 (48% similar). The 'DRAFTED CONTAINMENT' section contains four unchecked checkboxes for actions like quarantining stock, halting work, notifying management, and performing goods-in inspection. At the bottom, a 'RISK ASSESSMENT' matrix shows the incident's position relative to severity (Critical, Serious, Minor) and likelihood (Minor/Likely, Moderate/Likely, Moderate/Unlikely, Major/Unlikely).

One card with the AI suggestion panel: proposed severity/likelihood, similar incidents, containment steps, Accept / Dismiss

Within about a minute of an incident being reported, a panel headed **"Incident Triage suggests"** appears on its card, timestamped. It carries:

- **The reasoning first** — a sentence explaining the assessment, and when the register holds a related case it says so plainly ("*this is a repeat issue on CNC-02 (NCR-2026-0001)*"). That sentence is often the most valuable thing on the card.
- **Severity and likelihood** — as live dropdowns you can change before accepting; the computed priority chip updates with them.
- **Similar past incidents** — real records from your register, each a link with a similarity percentage ("59% similar"). Retrieved, never invented.
- **Drafted containment** — checkboxes, all **unticked**. The caption under them says exactly what ticking does: "*Ticked steps are created as containment actions on this incident.*"

The panel's footer states the contract: **"Drafted by Incident Triage · you decide."** Three things you can do, all recorded:

1. **✓ Accept** — adjust the dropdowns first if you disagree; tick the containment steps you want. The record shows what was proposed versus what you applied.
2. **✗ Dismiss** — one click, no justification demanded. The dismissal is permanently on the trail; "you can always say no" is the design.

3. **Ignore it and triage manually** — the panel just sits there. Nothing happens without you.

If the card says "**AI suggestion unavailable — monthly AI budget reached**": your organization's AI allowance for the month is used up. Everything else works normally; triage manually and the cards resume next month.

B3.4 Dismissing an incident outright

A duplicate or a mistaken report doesn't need an investigation. On the queue, the incident's own **Dismiss** closes it *with a required reason* that lands on the record and the audit trail. (This is separate from dismissing the AI suggestion — the queue has both buttons, labeled by what they act on.)

B3.5 Containment

Containment actions — what was done immediately, before anyone knew the cause — live on the incident's Details tab with an owner and a date each. Add them as they happen; they are part of the story an auditor reads later.

B4. Investigation and CAPA

B4.1 Starting the investigation

1. Open the incident → **Start triage** (if not already there) → **Begin investigation**.
2. On the **Investigation** tab, choose your method: **Five Whys** or **Fishbone**.

The screenshot displays the Northwind Precision Quality Manager interface. The sidebar on the left contains navigation links for Overview, Quality, Incidents & CAPA (selected), and Compliance. The main content area shows the 'Investigation' tab for a nonconformance incident titled 'Bore diameter oversize on lot NW-4488'. The incident details include the NCR number (NCR-2026-0003), the investigation status (Investigation), and the priority (High priority). The 'Five Whys' chain is shown with three steps, each with a 'WHY?' and 'BECAUSE' section. The third 'Why' is marked as the root cause. The conclusion section provides a summary of the investigation findings.

Investigation tab, Five Whys chain with a root cause marked

3. **Five Whys:** write each why/answer link; mark the link(s) that are root causes. **Fishbone:** add causes by category; mark root causes.
4. Write the conclusion and **Conclude investigation**.

B4.2 The AI CAPA draft

When you conclude an investigation, the CAPA Drafting agent reads what you actually wrote — your whys chain, your root causes — plus similar past incidents *and their CAPAs, including ones whose effectiveness checks failed*, retrieved from your own register. A card headed "**CAPA Drafting has drafted a plan**" appears on the incident's CAPA tab, carrying in order:

- **ROOT-CAUSE HYPOTHESES** — each with an Evidence: line quoting what your investigation actually established
- **TITLE, TYPE** (in plain words — "Corrective — stop this recurring"), and **ROOT CAUSE**
- **PROPOSED ACTIONS** — each with an **owner** (a dropdown over your real, active team roster — the AI cannot invent a person), a **due date**, and a remove control

Northwind Precision Quality Manager

Provetta > Incidents & CAPA > Record

Move to CAPA Close without CAPA

Bore diameter oversize on lot NW-4488

Nonconformance - CNC cell - CNC-02 - Reported by Nina Patel

NCR-2026-0003 • Investigation • High priority

Details Investigation **CAPA** Audit Trail Signatures

No corrective or preventive action raised yet. [+ Raise CAPA](#)

CAPA Drafting has drafted a plan 20 hours ago

ROOT-CAUSE HYPOTHESES

The CNC-02 tool-change routine specifies insert replacement but has no step requiring the wear offset to be reset or verified afterwards, so it is left to whoever performs the change. Evidence: Five Whys traced the oversize bore to the wear offset being left at the value the previous insert needed. The investigation states the tool-change routine on CNC-02 covers the insert change and stops there, with resetting the offset left to individual judgement.

TITLE

Build wear-offset reset into the CNC-02 insert-change routine

TYPE

Corrective — stop this recurring

ROOT CAUSE

The CNC-02 tool-change routine covers replacing the insert but does not require resetting or verifying the wear offset afterwards, leaving that step to whoever performs the change rather than making it a mandatory, checked part of the routine.

PROPOSED ACTIONS

Revise the CNC-02 insert-change work instruction/setup sheet to add a mandatory step: reset the wear offset to nominal and verify against a reference cut immediately after every insert change, with a signature field for the person making the change.

OWNER

Ray Okafor DUE 08/18/2026

Brief every operator who performs tool changes on CNC-02 on the revised routine and obtain a signed acknowledgement before they next carry out an insert change.

CAPA tab with the AI draft card: proposed actions with owners and due dates

Every field on the card is a live input — edit anything before accepting: wording, owners, dates, or delete an action outright. Accept, or dismiss. Same rules as triage: everything recorded, nothing applied without you.

B4.3 Raising and working the CAPA

1. Accept the AI draft, or click **+ Raise CAPA** to do it by hand — the dialog prefills the root cause from your investigation. (The record's top-right actions are **Move to CAPA** and **Close without CAPA** — the latter for incidents the investigation concluded need no corrective action, with the reasoning on the record.)
2. Add actions: description, owner, due date. Owners see their actions on their own dashboards.
3. **Start work** → complete actions as they finish.

The screenshot displays the Northwind Precision Quality Manager interface. The sidebar on the left contains navigation links: Overview (Dashboard, My Approvals), Quality (Documents, Incidents & CAPA, CAPA, Inspections, Suppliers), People (My Training, Training), Compliance (Records, Reports), and Settings. The main content area shows a CAPA record titled "Hold bore size on CNC-02: tool-change offset and gauge calibration". It includes a list of actions with checkboxes, an effectiveness section, and a root cause analysis.

Hold bore size on CNC-02: tool-change offset and gauge calibration
Corrective action - from NCR-2026-0006

CAPA-2026-0001 Closed NCR-2026-0006 - Bore diameter oversize on lot NW-4502

Plan Audit Trail Signatures

Action plan 2 of 2 complete

- ☒ Write the wear-offset update into the CNC-02 tool-change routine, and add a first-off-and-every-tenth-part bore check to the setup sheet, gauged with an in-calibration bore gauge and recorded on the traveller.
Nina Patel done Aug 6, 2026 by Ray Okafor
- ☒ Recall every gauge past its calibration date, and put the due date on the CNC-02 shift start-up check so an out-of-date gauge cannot stay in service between monthly reviews.
Ray Okafor done Aug 6, 2026 by Ray Okafor

Effectiveness
Verified effective

Both actions are complete: the wear-offset update and the in-process bore check are written into the CNC-02 setup sheet, and an out-of-date gauge is now stopped at the point of use rather than at the monthly review. Demonstration organisation — this register was seeded in one sitting, so the verification period is shown rather than elapsed and no recurrence data has yet accrued.

Closed Aug 6, 2026

Root cause
Updating it is left to the operator's judgement at the tool change — the setup sheet does not call for it and nothing at the control prompts it.
The recall list is reviewed monthly, and nothing at the point of use stops a gauge whose date passes between reviews.

CAPA detail with action list, owners, due dates

B4.4 Effectiveness — the step that makes it a real CAPA

1. When actions are complete, start the **effectiveness period** (e.g., 60 days).
2. At the end, record the verdict — **It worked** or **It didn't** — and sign it. This is a signed step for the same reason approval is: the verdict is the claim an auditor relies on.
3. **It worked** → close the CAPA, then close the incident (also signed).
4. **It didn't** → the CAPA reopens. That is not a failure of the system; it is the system telling the truth. The record of a plan that didn't hold is exactly what makes the next plan better — and the AI reads it too.

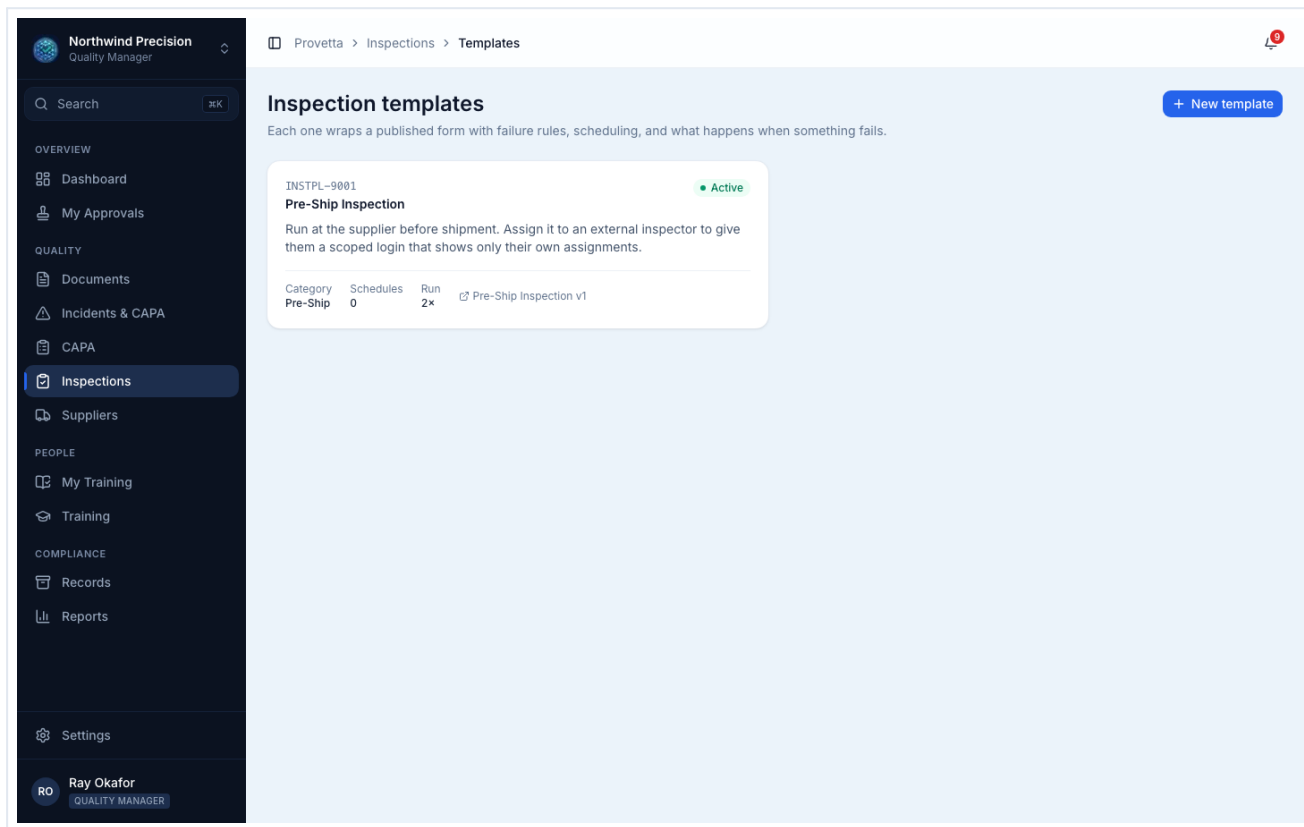
B4.5 The OSHA log

Recordable safety incidents feed the OSHA 300 log automatically — **Reports** → **OSHA** exports it.

B5. Inspections

B5.1 Templates and schedules

Inspection templates (checklists) are built in **Settings** → **Form templates** (or start from the provided ones, including the Pre-Ship Inspection). Schedules materialize inspections automatically and assign them by person or role.



Template list

B5.2 What the inspector sees

Assigned inspections appear under **My inspections**. The runner walks section by section: answers, measurements, and evidence. Photo checkpoints show a **"Take a photo"** dropzone — on a phone it opens the camera; on a laptop it's a file picker, and it accepts images, PDFs, Office documents, and CSVs up to 25 MB, marking each answer ✓ **Attached**. Every other item also carries **"Add photo or file"** underneath it, so evidence can attach to *any* answer, not just the checkpoints the template author anticipated. A hard failure can raise an NCR on the spot, carrying the evidence with it.

← Pre-Ship Inspection
INS-2026-0002

Section 6 of 6 No failures

Evidence

3 checks in this section

Photo: loaded container *

Take a photo
Images, PDF, Office docs, CSV — up to 25 MB each

✓ Attached

Photo: carton markings *

Take a photo
Images, PDF, Office docs, CSV — up to 25 MB each

Photo: product as packed *

Take a photo
Images, PDF, Office docs, CSV — up to 25 MB each

[Review and submit >](#)

Runner mid-section with a photo answer

B5.3 Review and verification

Submitted inspections come to you. Review the answers and photos, then **Verify** — a signed step. The response is frozen at submission; what you verify is exactly what was submitted.

B6. Suppliers

B6.1 Qualification

Suppliers walk their own lifecycle: **Prospective** → **Under evaluation** → **Approved**, with **Conditional**, **Suspended**, and **Disqualified** for when things change. Approval is signed — it is the decision that puts them on the ASL.

Suppliers

Qualification, monitoring, and the Approved Supplier List an auditor will ask for.

On the ASL: 0
Approved or conditional

Below risk threshold: 0
All above 60

Re-evaluation due: 0
All in date

Open SCARs: 0

STATUS: Prospective Under Evaluation Approved Conditional Suspended Disqualified CRITICALITY: Critical Major Minor

Search by ID, name, or category...

ID	Supplier	Category	Criticality	Status	Risk	Certs	Re-evaluation	SCARs
SUP-0001	Precision Tools	Machined Components	Major	Prospective	77	No expiry	Not scheduled	—
SUP-0002	ABC Components	Machined components	Major	Prospective	77	No expiry	Not scheduled	—

Register with mixed statuses

B6.2 The ASL

Suppliers → **ASL** is the approved supplier list an auditor asks for — current, exportable, always true because it is generated from the register rather than maintained beside it.

B6.3 Evaluations and risk

Periodic re-evaluations are scheduled by criticality. Risk scores combine your evaluation with incident history; a critical supplier going overdue for re-evaluation moves to Conditional automatically.

B6.4 SCARs — supplier corrective action requests

1. Raise a SCAR from a supplier-linked incident (or directly on the supplier).
2. The SCAR page shows a **Supplier link** card — **Copy link**, **Preview**, **Generate a new link** — private to this SCAR and carrying an expiry date. You send it to your supplier contact; they respond *without needing a Provetta account*, under three fixed headings: **root cause**, **what they did about the affected material**, and **corrective action**.
3. Their response lands on the SCAR under **"Verify this response"**: click **Start verification**, then either **Accept and close** — a *signed* step, like every decision an auditor relies on — or **Return for rework**, which sends the supplier back to the same link with your comments. The SCAR carries two chips side by side: its status (e.g., Responded) and its timeliness (e.g., Overdue), with the due date.

Acme Manufacturing
Quality Manager

Provetta > Suppliers > Scars

Repeated late deliveries against agreed lead time
Ganton Logistics

SCAR-2026-0002 Responded Overdue Due Jul 30, 2026 Ganton Logistics

Request **Response** Audit Trail

Their response Submitted Jul 28, 2026 1:17 PM - 28 days after issue

ROOT CAUSE
Our overnight trunk route was re-tendered in April and the new carrier's cut-off is two hours earlier than the previous one. Our despatch schedule was never adjusted, so any order picked after 15:00 missed the trunk and slipped a day.

WHAT THEY DID ABOUT THE AFFECTED MATERIAL
The six late shipments were re-delivered at our cost. Affected orders were flagged to your goods-in team as they happened.

CORRECTIVE ACTION
Despatch cut-off moved to 14:30 and built into the WMS as a hard gate. A daily exception report now goes to the depot manager for anything picked after cut-off.

Verify this response
Accepting closes the SCAR and is signed. Returning it sends the supplier back to the same link with your comments.

[Start verification](#)

☒ Accept and close ☐ Return for rework

SCAR with supplier response

B7. Training

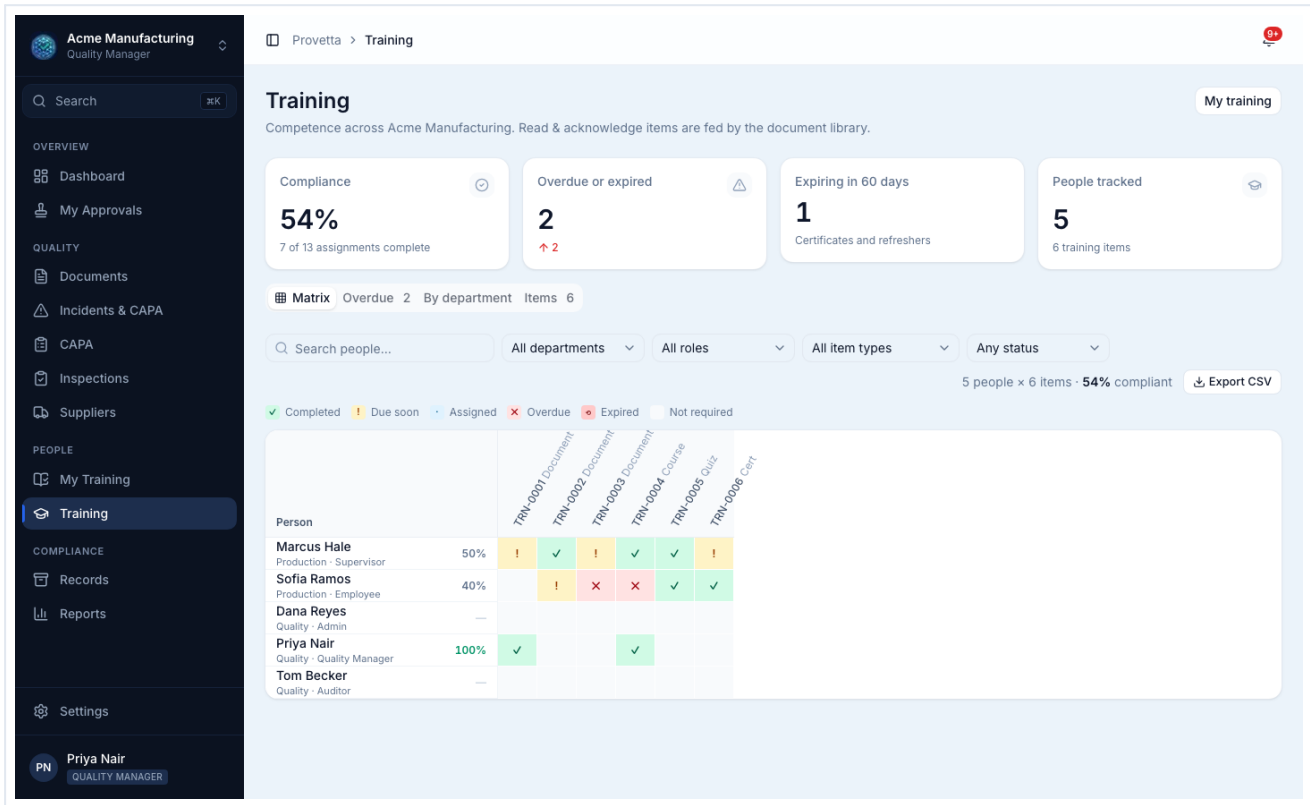
B7.1 Items and assignments

Training items (courses, SOP reads, quizzes) are assigned by person, role, or department. Each assignment tracks completion, score, and expiry.

B7.2 Quizzes and reading acknowledgments

Quizzes grade automatically with limited attempts. Reading acknowledgments tie into document control — when a document goes effective, the people who must read it get an assignment, and their sign-off is recorded.

B7.3 The matrix



Matrix view: people × items, green/amber/red

The training page has four tabs — **Matrix** · **Overdue** · **By department** · **Items** — and the matrix is the wall chart an auditor actually believes: person by item, with six states in its legend: **Completed**, **Due soon**, **Assigned**, **Overdue**, **Expired**, **Not required**. That last one matters when reading it — a blank-styled cell means the item doesn't apply to that person, not a compliance gap. Certificates are generated per completion.

B8. Records, retention, and audit binders

- **Records** is the cross-module registry: every controlled record, filterable by type, status, and retention state.
- **Retention** policies mark what is past its period; legal holds prevent anything under hold from being archived.
- **Audit binders** assemble evidence packages — pick the scope, the binder collects the records and builds a manifest. Ask it for "everything supporting §8.4, last 12 months" during audit season and hand the auditor a package instead of a screen-share.

Northwind Precision
Quality Manager

Search

OVERVIEW

Dashboard

My Approvals

QUALITY

Documents

Incidents & CAPA

CAPA

Inspections

Suppliers

PEOPLE

My Training

Training

COMPLIANCE

Records

Reports

Settings

RO

Ray Okafor

QUALITY MANAGER

Provetta > Records

Records

Every quality record in one place, with its retention class and its trail.

Records

25

Across every module

Eligible for archive

0

None past retention

On legal hold

0

No holds in place

No retention policy

0

Every type is covered

Build audit binder

Search by record ID or title...

All

Eligible for archive

On legal hold

mm/dd/yyyy

to

mm/dd/yyyy

Document

Incident

CAPA

Inspection

SCAR

Supplier

Training record

Management review

RECORD	TYPE	TITLE	STATUS	FILED UNDER	CREATED	KEEP UNTIL	RETENTION
CAPA-2026-0002	CAPA	Set a tool...	Reopened	Ray Okafor	Aug 7, 2026	—	Open
SAF-2026-0002	Incident	broken ha...	Closed	Nina Patel	Aug 7, 2026	Aug 8, 2031	Retained
SUP-0002	Supplier	ABC Com...	Prospective	Ray Okafor	Aug 7, 2026	Aug 7, 2033	Retained
SUP-0001	Supplier	Precision ...	Prospective	Ray Okafor	Aug 7, 2026	Aug 7, 2033	Retained
CAPA-2026-0001	CAPA	Hold bore...	Closed	Ray Okafor	Aug 6, 2026	Aug 7, 2033	Retained
NCR-2026-0006	Incident	Bore diam...	Closed	Ray Okafor	Aug 6, 2026	Aug 7, 2031	Retained
NCR-2026-0005	Incident	Goods-in ...	Triage	Ray Okafor	Aug 6, 2026	—	Open
DEV-2026-0002	Incident	Bore gaug...	Reported	Ray Okafor	Aug 6, 2026	—	Open
CMP-2026-0001	Incident	Customer...	Reported	Ray Okafor	Aug 6, 2026	—	Open
DEV-2026-0001	Incident	Superseded...	Reported	Nina Patel	Aug 6, 2026	—	Open
MPR-2026-0004	Incident	Surface fi...	Reported	Nina Patel	Aug 6, 2026	—	Open

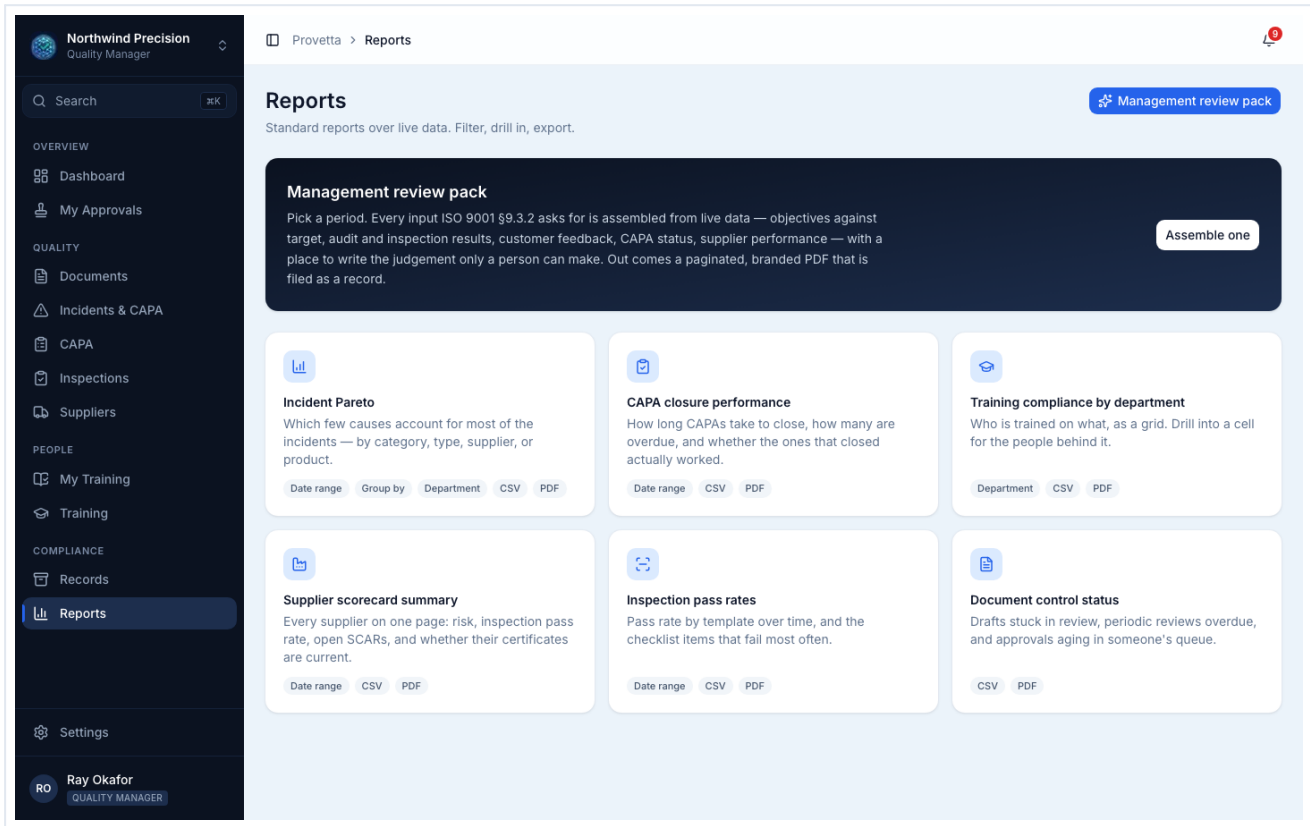
Registry with retention chips

B9. Reports and management review

Six built-in reports cover the review agenda: incident trends, CAPA aging, supplier performance, training compliance, document status, inspection results. Each exports. **Management review** assembles the periodic review record itself — inputs, minutes, decisions — as a controlled record.

Provetta User Workbook

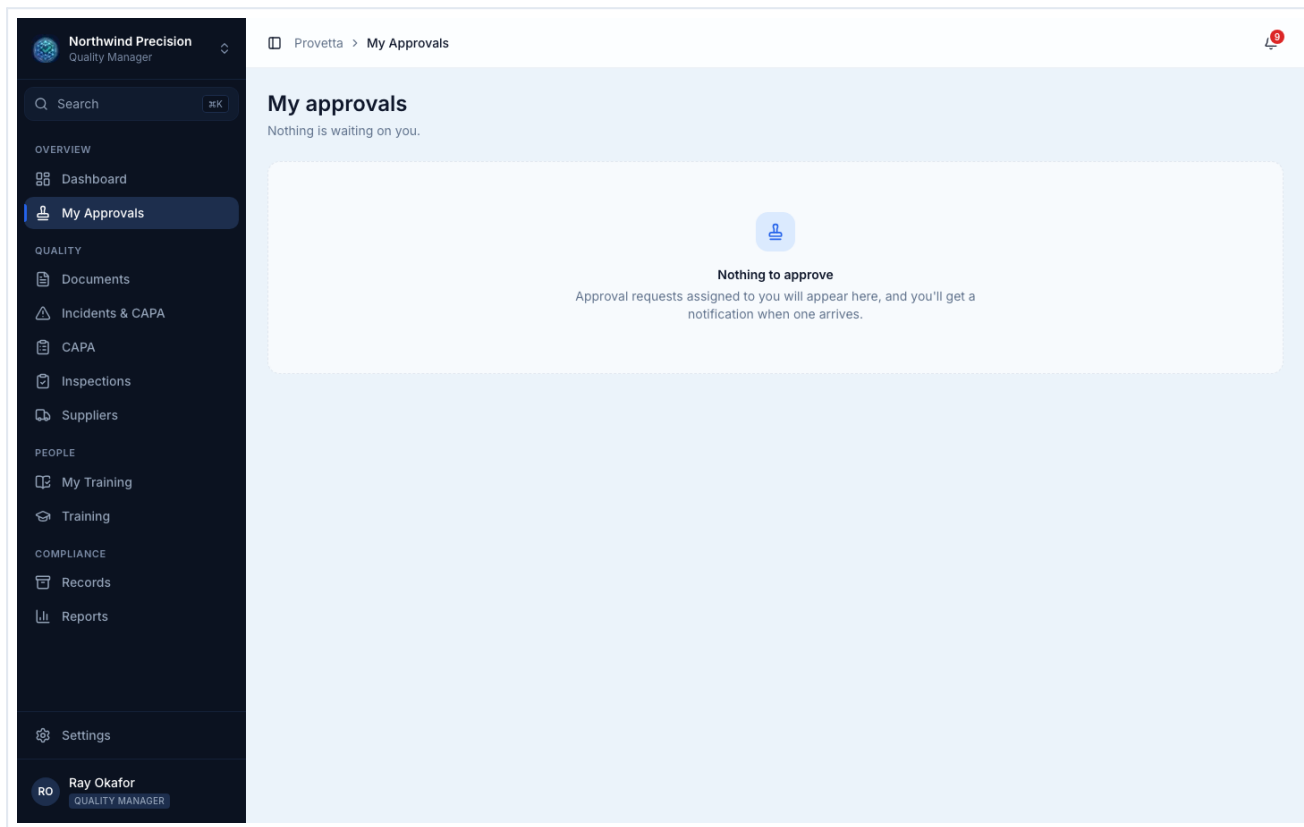
29



Report library

B10. The approvals queue

My Approvals (top of the sidebar, under OVERVIEW) is everything waiting for *your* signature or decision, in one place: documents in review, inspections to verify, CAPAs at effectiveness. Start your day at the dashboard; end it with this queue empty.

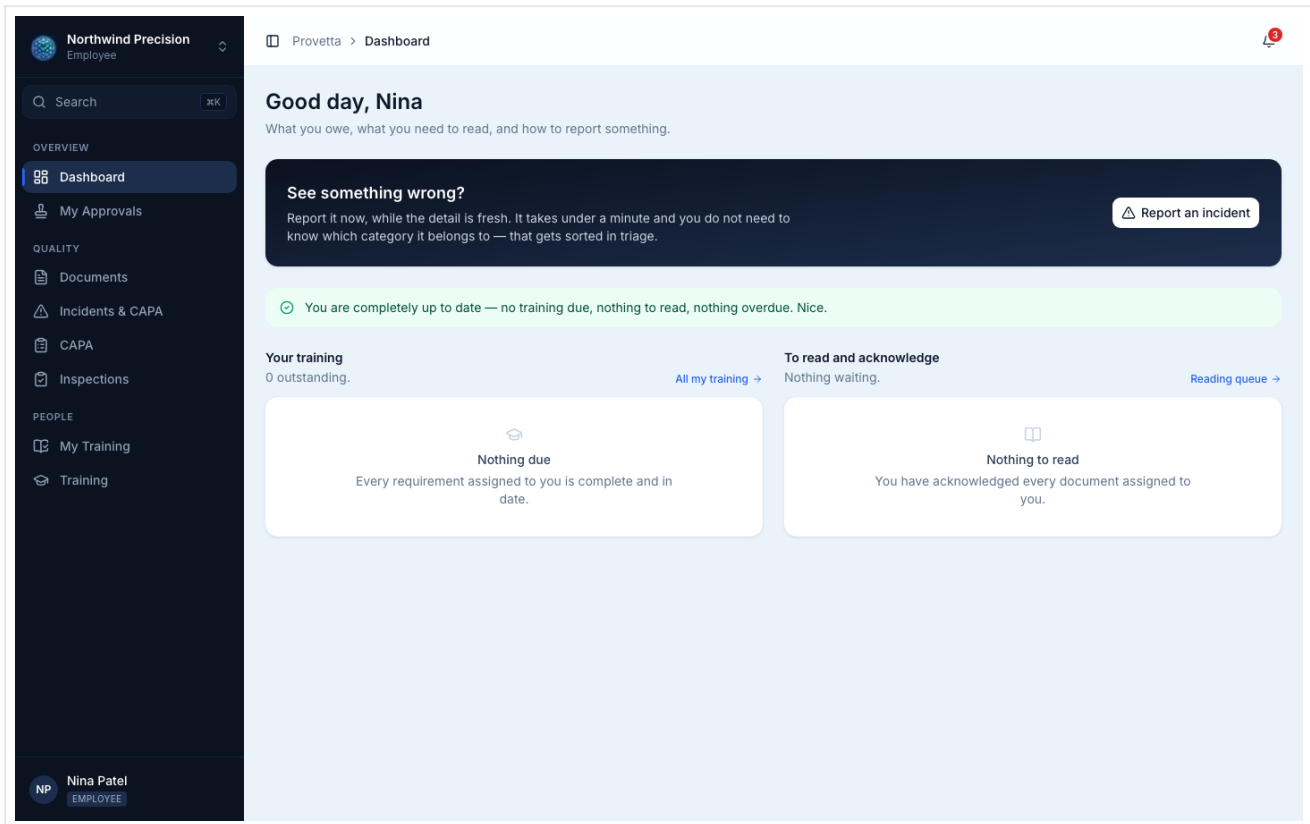


Queue with mixed pending items

Track C — The Supervisor & Employee Workbook

The shortest track on purpose: your Provetta is the work assigned to you and the things you notice. Four processes cover almost everything; supervisors get one more.

C1. Your dashboard



Employee dashboard: my inspections, my training, my actions

Everything with your name on it, in one place: inspections assigned to you, training due, CAPA actions you own, documents waiting for your read acknowledgment. If it's not here, it's not yours to do.

C2. Reporting an incident

When something goes wrong — a bad part, a spill, a near miss, a customer complaint:

1. **Incidents & CAPA** → **Report** (or the report button on your dashboard).
2. Pick the type — the choice matters, because safety incidents and nonconformances go down different paths later.

- Describe what happened. Where, which product or lot if you know it. Plain words beat formal ones: *"coolant has run out past the chip guard and the floor is slippery"* is a perfect report.
- Submit. You get a record ID (like NCR-2026-0007) — that's your receipt, and you can open it any time to see what happened next.

The screenshot shows the 'Incidents & CAPA' section of the Northwind Precision web application. A modal dialog titled 'Report an incident' is open. The dialog contains the following fields:

- Type:** A dropdown menu currently showing 'Nonconformance'.
- What happened?:** A text input field containing 'Seal splitting on line 3 at speed'.
- Detail (optional):** A larger text area for additional details.
- Where? (optional):** A text input field for location.

At the bottom of the dialog are 'Cancel' and 'Report' buttons. The background interface includes a sidebar with navigation options like 'Dashboard', 'My Approvals', 'Documents', 'Incidents & CAPA', 'CAPA', 'Inspections', 'My Training', and 'Training'. The main content area displays a bar chart titled 'This quarter' showing incident counts by type (Nonconformance, Near Miss, Customer Complaint) and a table of incident records with columns for ID, Title, Status, Priority, and Source.

Report dialog open, type selector visible

What happens next: the quality manager sees it in their triage queue within a minute — usually with an AI assessment already attached. You may see containment actions or an investigation appear on your report. Nothing you wrote gets edited; the record grows, it never changes underneath you.

C3. Reporting from your phone — Quick Report

Near the QR posters on the floor:

- Scan the poster** with your phone camera. The form opens in the browser — no app, no login — with your site's name at the top (*Northwind Precision / CNC Cell — Line 2*), so you know the report lands where you're standing.
- Pick what fits.** The first screen asks *"What would you like to report?"* — five choices in plain words, with its own advice: *tap the one that fits best, don't worry about getting it exactly right:*
 - Something doesn't meet spec* — a part, batch, or material out of tolerance
 - Someone got hurt* — an injury, illness, or unsafe condition

- *Something almost went wrong* — no harm this time, but it could have been
 - *We didn't follow the procedure* — a process ran differently from how it's written
 - *A customer complained* — feedback about a product or order that shipped
3. **Say what happened** — *"In your own words. A sentence is plenty."* Add where, and whether it was just now or earlier. **Next.**
 4. **Photos, then submit.** Your name is optional — the form says so itself: *"Leave blank to report anonymously... Anonymous reports are taken just as seriously."*

Northwind Precision
CNC Cell — Line 2

What would you like to report?

Tap the one that fits best. Don't worry about getting it exactly right.

**Something doesn't meet spec**
A part, batch, or material is out of tolerance

**Someone got hurt**
An injury, illness, or unsafe condition

**Something almost went wrong**
No harm done this time, but it could have been

**We didn't follow the procedure**
A process ran differently from how it's written

**A customer complained**
Feedback about a product or order that shipped

Step 1: the five-choice type picker

 **Northwind Precision**
CNC Cell — Line 2

Anything to show us?

A photo helps more than anything. Both of these are optional.

 Take a photo

Your name (optional)

Leave blank to report anonymously

You don't have to give it. Anonymous reports are taken just as seriously.

Submit report

Step 3: photos and submit

It lands in the same triage queue as every other report. Use it for anything you'd hesitate to walk back to a terminal for — a photo taken in the moment is worth three paragraphs written an hour later.

C4. Running an inspection

1. Your assigned inspections are on the dashboard and under **Inspections**. Open one → **Start**.
2. The runner walks you section by section. Answer each item; measurements want numbers. Photo checkpoints show a **"Take a photo"** dropzone — your camera on a phone, a file picker on a computer, and it takes images, PDFs, and documents up to 25 MB, marking the answer ✓ **Attached**. Every item also offers **"Add photo or file"** — attach evidence to anything, not just where it's required.

3. Your answers save as you go. If your connection drops, what you entered is still there when it comes back.
4. If something fails badly, say so honestly — a hard failure can raise a nonconformance automatically, carrying your evidence with it. That is the system working, not you causing trouble.
5. **Review and submit** at the end of the last section brings up the summary — headed *"Before you submit"*, with your results tallied. **Sign and submit** opens the electronic signature dialog: it names the record, states the meaning of this signature (**Verified**), asks for your password, and offers an optional comment for any qualification you want on the record. The button is **Sign as Verified** — and from that click, the inspection freezes exactly as you submitted it: nobody, including the quality manager, can change your answers afterward.

The screenshot shows the 'Pre-Ship Inspection' form for 'INS-2026-0002'. It is 'Section 4 of 6' and shows 'No failures'. The section is titled 'Dimensional checks' with '4 checks in this section'. The first check is 'Sample size drawn *' with a red asterisk, asking for the 'AQL sample, or the number of units actually measured.' The value '32' is entered. The second check is 'Key dimension A *' with a red asterisk, asking to 'Edit the tolerance on this template to match your drawing.' The value '24.85' is entered, with a green border indicating it is 'In range · 0-1000 mm'. The third check is 'Key dimension B' with the value '12.4' entered, also with a green border. A blue button at the bottom says 'Next section >'.

← Pre-Ship Inspection
INS-2026-0002

Section 4 of 6 No failures

Dimensional checks
4 checks in this section

Sample size drawn *
AQL sample, or the number of units actually measured.

32

📷 Add photo or file

Key dimension A *
Edit the tolerance on this template to match your drawing.

24.85 mm

In range · 0-1000 mm

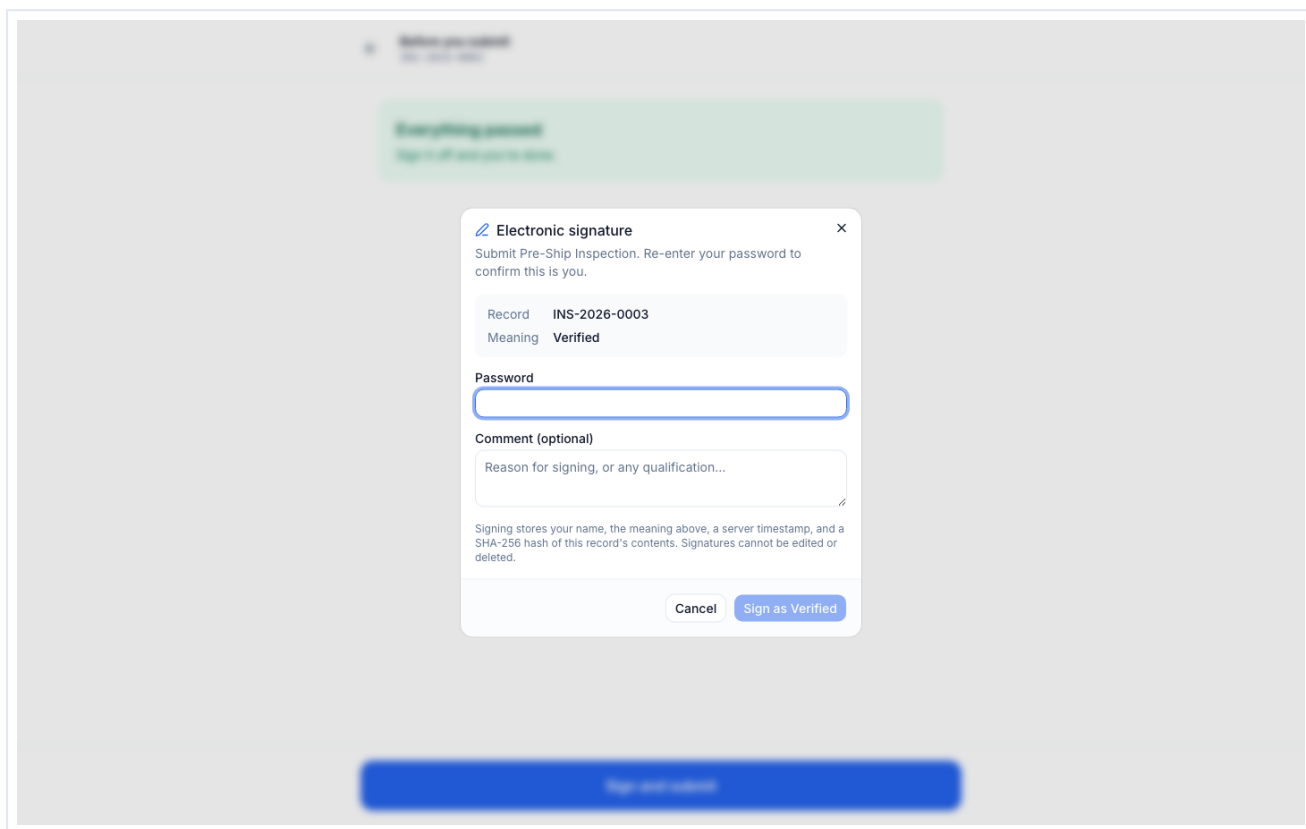
📷 Add photo or file

Key dimension B

12.4 mm

Next section >

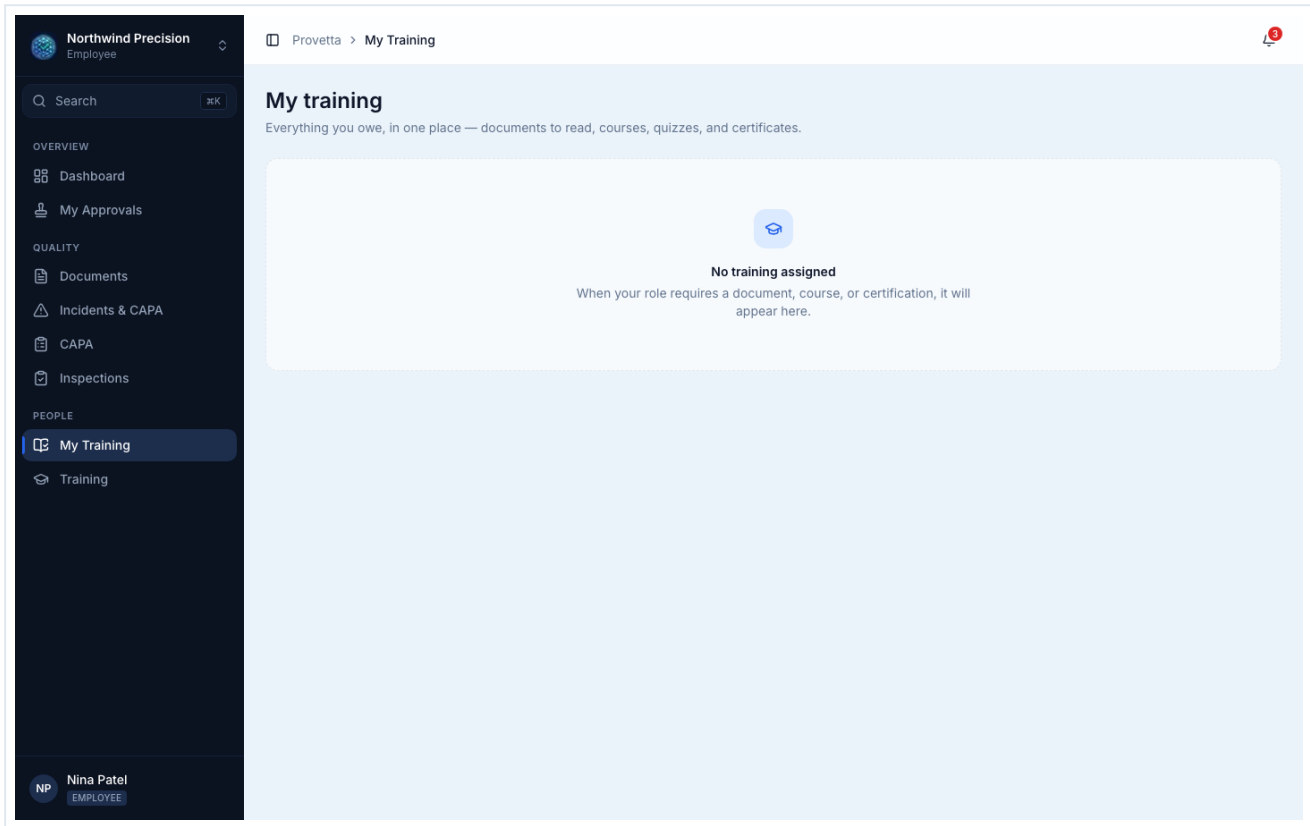
Runner mid-section, photo answer filled



Signature dialog on submit

C5. Your training

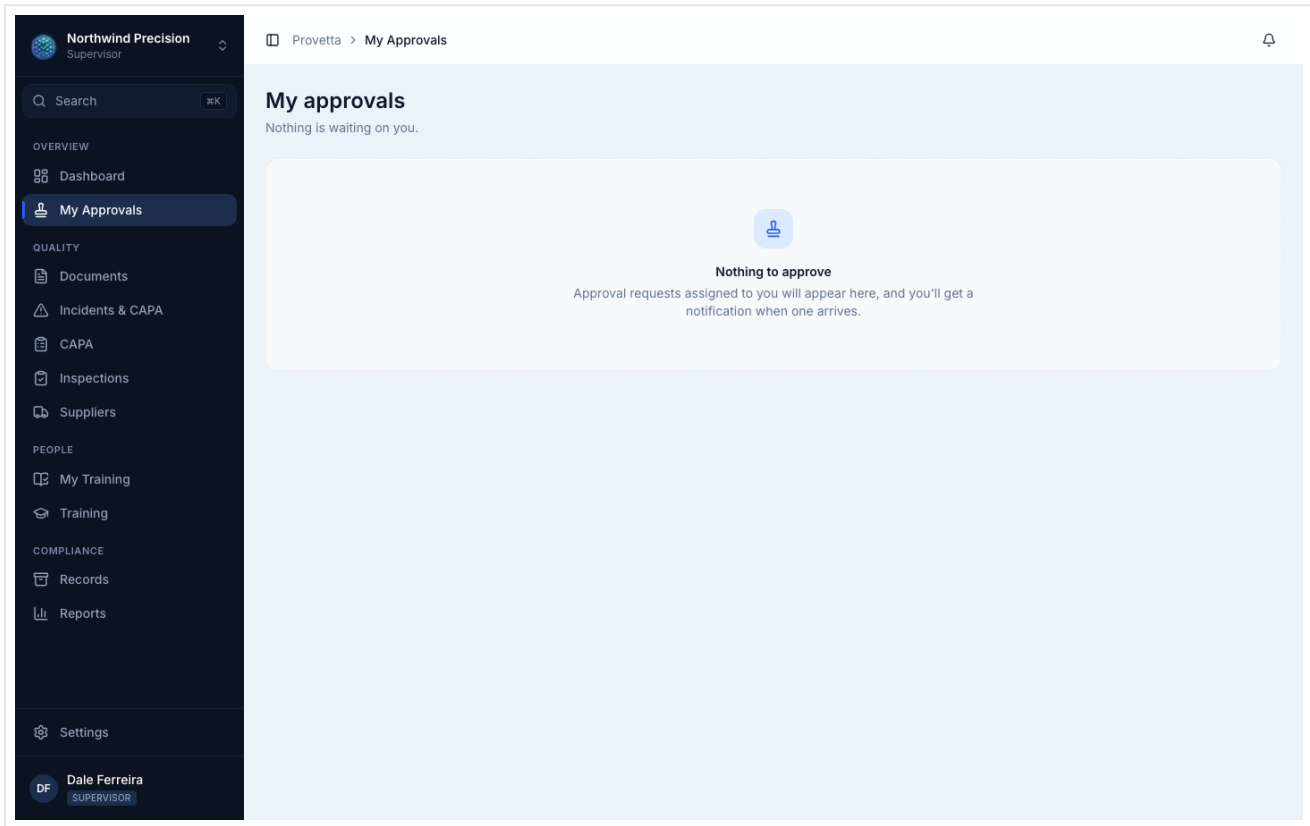
In the sidebar under PEOPLE, **My Training** — note it's a separate item from **Training**, which is the manager's view.



My training list with due dates

- **Courses and quizzes** — open the assignment, work through it, pass the quiz. Attempts are limited; scores are recorded.
- **Reading acknowledgments** — when a document you must know goes effective, it appears here. Read it, then sign the acknowledgment. That signature is your name saying *"I have read the current revision"* — treat it that way.
- Certificates for completed training are downloadable from the assignment.

C6. Supervisors: your approvals queue



Pending approvals list

My Approvals (top of the sidebar) collects everything waiting on your judgment. Two habits keep it honest:

- Open the thing before approving it. The record view shows you exactly what was submitted; your approval signs *that*, not the summary row.
- If it's wrong, reject it with a reason. A rejection with a reason is a normal, healthy record — a rubber stamp is the thing audits are designed to catch.

Track D — The External Inspector's Workbook

You inspect on behalf of a Provetta customer — typically a pre-ship inspection at a factory. Your access is deliberately narrow: you see the inspections assigned to you and nothing else. This track is written to be read in ten minutes; a Chinese edition (■■■) will mirror it.

D1. Accepting your invitation

1. You'll receive an email invitation from the organization that engaged you. Open the link.
2. The page shows you exactly what you're accepting before you commit — the **organization**, your **role** (External Inspector), and the **email** it was sent to — then asks for your name and a password (at least 8 characters). **Accept and create account** does both in one step. Already have an account from previous work? Use the **Sign in** link beneath instead.
3. If the link has expired, ask your contact to re-invite you — links are single-use and time-limited on purpose.

PROVETTA

The quality system your team actually wants to use.

Documents, training, incidents, CAPA, inspections, suppliers, and audit-ready records — set up in a day.

ISO 9001 · ISO 13485 · 21 CFR Part 11 ready

Join Acme Manufacturing

Create your account to accept this invitation.

Organization	Acme Manufacturing
Role	External Inspector
Email	workbook-shot-1786218175963@pr...

Your name

Jane Doe

Create a password

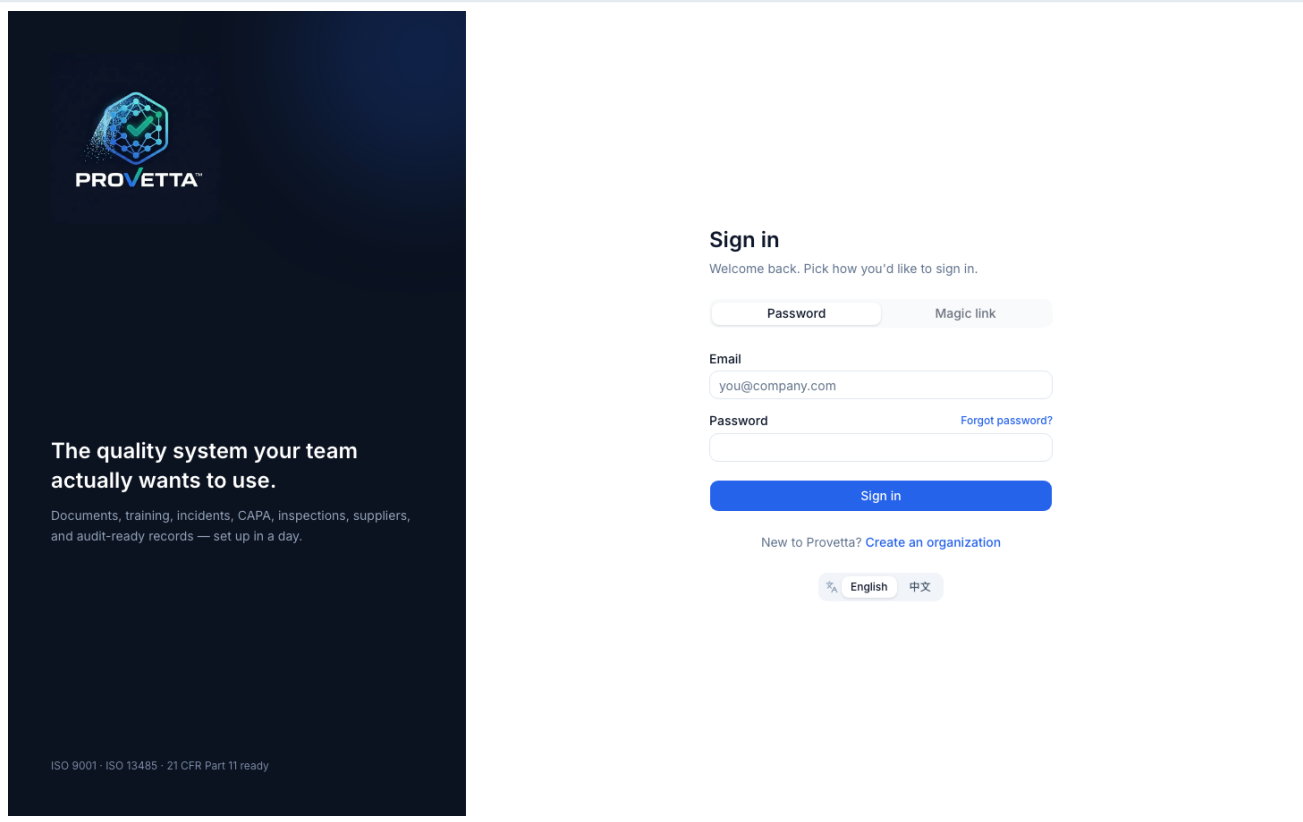
At least 8 characters.

Accept and create account

Already have an account? [Sign in](#)

Invite acceptance screen

D2. Signing in and choosing your language



Login with the language toggle visible

The login screen (headed "**Sign in**") has a language toggle — **English / ■■** — beneath the form. Your choice applies to every screen you use: your inspection list, the runner, and the record. (Checklist content — the questions themselves — appears as the customer wrote it.) Sign-in offers two modes: **Password**, or **Magic link** — which emails you a one-tap sign-in link and may be the easier path on a phone at a factory.

D3. My Inspections

Northwind Precision
External Inspector

Provetta > Inspections

My Inspections

The inspections assigned to you, and your history.

Open
2

Assigned to me
2
Waiting on you

Overdue
0
All on time

Failed
0

Table Calendar STATUS Scheduled In Progress Submitted CATEGORY Incoming In-Process Final Safety Walk Internal Audit Pre-Ship

RESULT Pass Pass with findings Fail

Search by ID, template, inspector, lot...

ID	Template	Category	Inspector	Scheduled / submitted	Status	Result	Disposition	Incident
INS-2026-0005	Pre-Ship Inspection	Pre-Ship	Hector Alvarez	Aug 9, 2026	In Progress	—	—	—
INS-2026-0004	Pre-Ship Inspection	Pre-Ship	Hector Alvarez	Aug 9, 2026	In Progress	—	—	—

HA Hector Alvarez
EXTERNAL INSPECTOR

Inspector's list: only assigned inspections

After signing in, the sidebar has a single item — **My Inspections** — opening the page of the same name: "The inspections assigned to you, and your history." Four stat cards (Open · Assigned to me · Overdue · Failed) and filters sit above the list. This list is complete: if an inspection isn't here, it isn't yours, and no other part of the customer's system is visible to you. There is nothing here for starting an inspection of your own, deliberately — the work comes to you from the company that engaged you. That boundary is enforced by the database itself, and it protects you as much as them — nobody can claim you saw something you couldn't have.

D4. Running a Pre-Ship Inspection

1. Open the inspection → **Start**.
2. Work through the sections: lot and quantity checks, workmanship checkpoints, packaging, marking. Answer what you observe — the checklist is the customer's, the observations are yours.
3. **Photos are required where marked** — cartons, labels, defects found. Each photo checkpoint is a "Take a photo" dropzone: on your phone it opens the camera — shoot in place, in the moment; it also accepts files (images, PDFs, documents up to 25 MB), so a mill certificate or packing list attaches the same way. Answered checkpoints show ✓ **Attached**, and every other item carries **"Add photo or file"** for evidence the checklist didn't anticipate.
4. **Defects**: classify what you find where the checklist asks (critical / major / minor). Found something serious outside the checklist? See D6.

5. Your answers save as you go. Poor connectivity on a factory floor is normal; what you've entered survives.

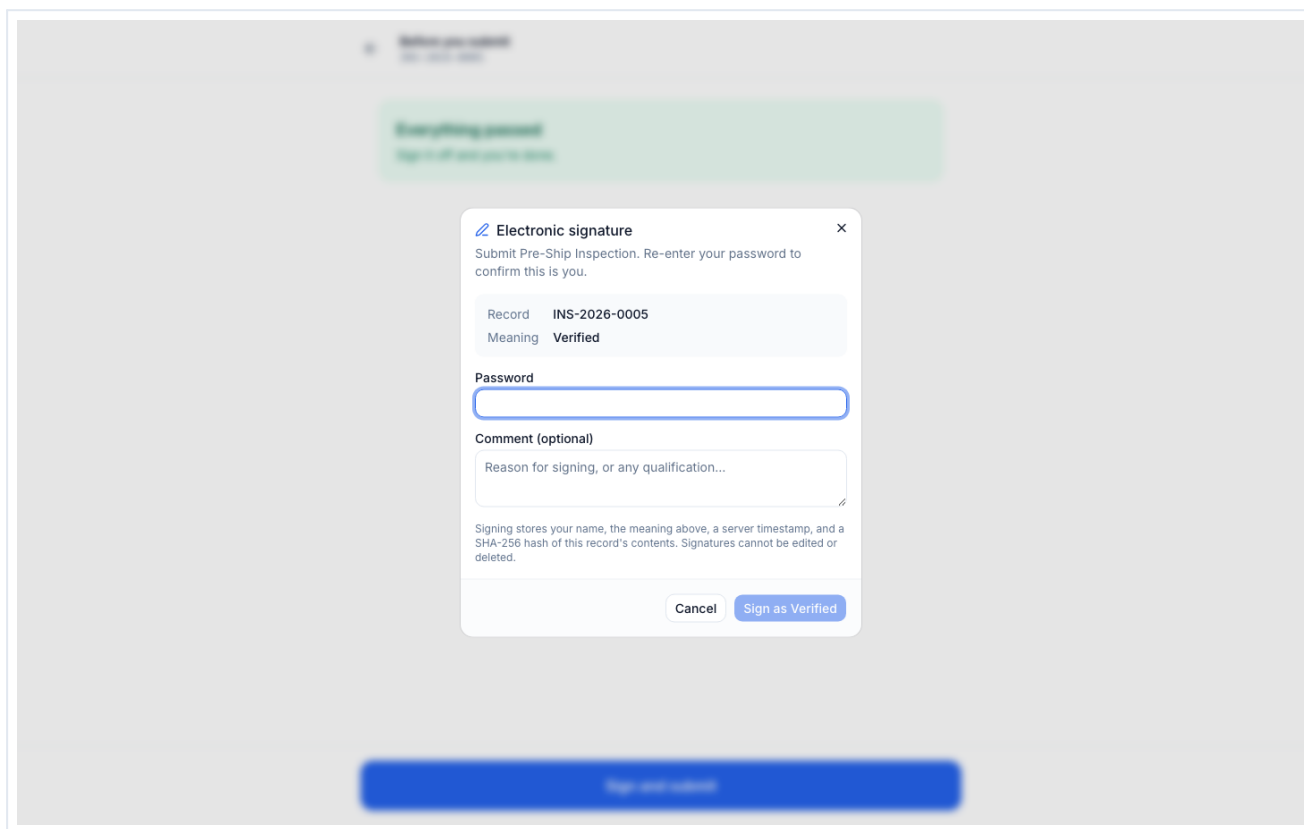
The screenshot shows a web interface for a 'Pre-Ship Inspection' (INS-2626-0004). At the top, it indicates 'Section 6 of 6' and 'No failures'. The main section is titled 'Evidence' and shows '3 checks in this section'. There are three photo upload prompts: 'Photo: loaded container *', 'Photo: carton markings *', and 'Photo: product as packed *'. Each prompt has a 'Take a photo' button and a note: 'Images, PDF, Office docs, CSV — up to 25 MB each'. The first prompt also shows a green checkmark and the text 'Attached'. At the bottom, there is a blue button labeled 'Review and submit >'.

PSI runner, photo checkpoint

D5. Submitting and signing

At the end of the last section, **Review and submit** brings up a summary headed "*Before you submit*" with your results tallied. **Sign and submit** opens the **Electronic signature** dialog. It shows you everything before you commit: the record you're signing, the stated meaning of this signature (**Verified**), a password field — "*Re-enter your password to confirm this is you*" — and an optional comment for any qualification you want on the record. The dialog says plainly what signing stores: your name, the meaning, a server timestamp, and a SHA-256 hash of the record's contents — and that signatures cannot be edited or deleted. The button is **Sign as Verified**.

Your signature means: *these are my observations, made by me, as recorded*. The moment you sign, the inspection freezes — the customer sees exactly what you submitted, and neither they nor anyone else can alter your answers. The record displays the fingerprint (sha256: and the first 16 characters; the full value is stored and exportable).



Signature dialog on submit

D6. Reporting an issue beyond the checklist

If you find something that needs the customer's attention now — a safety hazard, a systemic defect, something the checklist never asked about — use **Report an issue** from the inspection. It raises an incident in the customer's system, linked to your inspection, and their quality team is notified. You'll see the reference number as confirmation; handling it from there is their side of the fence.

D7. What you can and cannot see — stated plainly

You can see: inspections assigned to you; the checklists they use; your own submissions and their status.

You cannot see: the customer's documents, incidents, suppliers, training records, other inspectors' work, or anything in their organization beyond your assignments. When something is denied, it is denied by the database — not hidden by the screen.

This is by design and it is symmetric: your work is protected from alteration exactly as firmly as their data is protected from view.

Track E — The Auditor's Workbook

Your role sees everything and changes nothing — enforced by the database, not etiquette. This track is about finding evidence fast and trusting what you find.

E1. What read-only means here

Signed in as an auditor, every register, record, trail, and report is open to you; every button that would change something is absent or disabled — and behind the missing buttons, the database itself refuses writes from your role. You cannot accidentally alter the thing you're auditing.

E2. Reading an audit trail

The screenshot shows the Northwind Precision Auditor interface. The sidebar on the left contains navigation links: Overview, Quality, Incidents & CAPA (selected), and Compliance. The main content area displays the 'Audit Trail' for a record titled 'Bore diameter oversize on lot NW-4488'. The record is a Nonconformance - CNC cell - CNC-02, reported by Nina Patel. The audit trail shows a list of events, each with a status, user, and timestamp. The events are: 'Investigation concluded' (Ray Okafor, Aug 7, 2026 7:00 PM), 'Status changed' (Ray Okafor, Aug 7, 2026 7:00 PM), 'Status changed' (Ray Okafor, Aug 7, 2026 7:00 PM), 'Containment added' (Ray Okafor, Aug 7, 2026 6:59 PM), 'Containment added' (Ray Okafor, Aug 7, 2026 6:59 PM), and 'Containment added' (Ray Okafor, Aug 7, 2026 6:59 PM). Each event has a '2 fields changed' disclosure link.

Audit Trail tab open

Every record carries its trail, headed **"Audit trail"** with its own one-line contract: *"Every change to this record, append-only."* Events read in plain lowercase — "investigation concluded", "status changed", "containment added" — filterable by person, action, and date. Before-and-after values sit behind a **"N fields changed"** disclosure on each row — click it open rather than looking for columns. Three properties worth knowing:

- **Append-only.** Events are never edited or deleted — by anyone, including administrators and Provetta itself.

- **Hash-chained.** Each event carries a cryptographic link to the one before it. A gap or alteration anywhere breaks every link after it — tampering isn't just forbidden, it's *detectable*.
- **Attributed.** Human actions carry the person; AI suggestions carry the agent; support access carries the named support operator. "System" only ever appears for genuine system acts, and imported legacy history is labeled as exactly that — never dressed up as native events.

E3. Verifying signatures

The screenshot shows the Northwind Precision Auditor interface. On the left is a dark sidebar with navigation links: Overview, Dashboard, My Approvals, Documents (selected), Incidents & CAPA, CAPA, Inspections, Suppliers, My Training, Training, Records, Reports, and Settings. The main content area shows the 'Quality Manual' document, owned by Ellen Vance. It indicates the document is 'Effective', 'Current', and 'LOCKED'. Below this, a tabbed interface shows 'Signatures' as the active tab. The 'Signatures — Rev A' section displays a single signature entry for 'Ray Okafor' with the status 'Approved'. The entry includes a timestamp 'Aug 6, 2026 4:30 PM' and a SHA-256 hash 'sha256:1b794cba5862c9ef...'.

Signatures tab: signer, meaning, timestamp, hash

Every signature shows the signer, the **meaning** (Approved, Verified...), the server timestamp, and the record's SHA-256 fingerprint — displayed as sha256: plus its first 16 characters, with the full 64 behind a hover and in exports. The record locked at signing; if the content ever differed from what was signed, the hash would say so.

E4. The records registry and retention

Northwind Precision Auditor

Search

OVERVIEW

Dashboard

My Approvals

QUALITY

Documents

Incidents & CAPA

CAPA

Inspections

Suppliers

PEOPLE

My Training

Training

COMPLIANCE

Records

Reports

Settings

PR Priya Raman AUDITOR

Provetta > Records

Records

Every quality record in one place, with its retention class and its trail.

You have read access across the whole organisation. Start here: filter to the record types and dates in scope, then [build an audit binder](#) to take the evidence away as a single indexed file.

Records

25

Across every module

Eligible for archive

0

None past retention

On legal hold

0

No holds in place

No retention policy

0

Every type is covered

Search by record ID or title...

All

Eligible for archive

On legal hold

mm/dd/yyyy

to

mm/dd/yyyy

Document

Incident

CAPA

Inspection

SCAR

Supplier

Training record

Management review

RECORD	TYPE	TITLE	STATUS	FILED UNDER	CREATED	KEEP UNTIL	RETENTION
CAPA-2026-0002	CAPA	Set a tool...	Reopened	Ray Okafor	Aug 7, 2026	—	Open
SAF-2026-0002	Incident	broken ha...	Closed	Nina Patel	Aug 7, 2026	Aug 8, 2031	Retained
SUP-0002	Supplier	ABC Com...	Prospective	Ray Okafor	Aug 7, 2026	Aug 7, 2033	Retained
SUP-0001	Supplier	Precision ...	Prospective	Ray Okafor	Aug 7, 2026	Aug 7, 2033	Retained
CAPA-2026-0001	CAPA	Hold bore...	Closed	Ray Okafor	Aug 6, 2026	Aug 7, 2033	Retained
NCR-2026-0006	Incident	Bore diam...	Closed	Ray Okafor	Aug 6, 2026	Aug 7, 2031	Retained
NCR-2026-0005	Incident	Goods - in ...	Triage	Ray Okafor	Aug 6, 2026	—	Open
DEV-2026-0002	Incident	Bore gaug...	Reported	Ray Okafor	Aug 6, 2026	—	Open
CMP-2026-0001	Incident	Customer...	Reported	Ray Okafor	Aug 6, 2026	—	Open

Registry with retention chips

Records is the cross-module registry — filter by type, status, date, retention state. Retention policies and legal holds are visible per record, so "how long do you keep these and what's frozen" is answerable in one screen.

E5. Audit binders

Northwind Precision Auditor

Search

OVERVIEW

Dashboard

My Approvals

QUALITY

Documents

Incidents & CAPA

CAPA

Inspections

Suppliers

PEOPLE

My Training

Training

COMPLIANCE

Records

Reports

Settings

Priya Raman AUDITOR

Provetta > Records > Binder

Audit binder

Pick a scope. Get one indexed file with every record in it, its trail, and its signatures.

What is this binder for

Name

ISO 9001 surveillance audit, March 2026

Standard or purpose

ISO 9001:2015

Scope

Records are selected by the date they were created.

Documents

6

Incidents

13

CAPAs

2

Inspections

2

SCARs

0

Suppliers

2

Training records

0

Management reviews

0

From

08/08/2025

To

08/08/2026

What to include with each record

Audit trail

Every event on the record: who, what, when, and why.

Electronic signatures

Signer, meaning, timestamp, and the full content hash.

Notes for the index (optional)

Anything the reader of this binder should know about how it was scoped.

This binder will contain

25 records across 8 types

Document

6

Incident

13

CAPA

2

Inspection

2

Supplier

2

Build the binder

Builds in the background. You will be notified when it is ready.

Binder with manifest

Ask for evidence as a package: a binder collects the records in scope with a manifest. Clause-mapped requests ("§8.4 evidence, last 12 months") are the intended use — the package beats an afternoon of screen-sharing.

E6. Exports

Registers and reports export throughout. Exports are generated from the live records at the moment of export — there is no shadow copy that could drift from what you see on screen.

Provetta User Workbook

48

Appendix 1 — Working with AI suggestions (all roles)

The screenshot shows the Northwind Precision Quality Manager interface. The sidebar on the left contains navigation links: Overview, Dashboard, My Approvals, Quality, Incidents & CAPA (selected), People, Compliance, and Settings. The main content area is titled 'Triage' and shows '9 Incidents waiting on an assessment.' A specific incident card is highlighted, titled 'NCR-2026-0005' with status 'In Triage' and 'Nonconformance'. The incident description is 'Goods-in inspection not recorded for an incoming shipment' by Ray Okafor, 2 days ago. The card includes a section 'Incident Triage suggests' with a timestamp '2 days ago' and a description: 'Uninspected material was drawn into production, risking undetected nonconforming stock in a job, but no closely similar past incidents indicate a recurring pattern.' Below this are dropdowns for 'SEVERITY' (3 - Serious) and 'LIKELIHOOD' (2 - Unlikely), resulting in a 'Medium' risk level. A 'SIMILAR PAST INCIDENTS' section lists three related incidents with their similarity percentages. A 'DRAFTED CONTAINMENT' section lists four proposed actions. At the bottom, a 'RISK ASSESSMENT' table shows a grid of colored cells (yellow, red, blue) corresponding to different severity and likelihood levels.

AI suggestion card, annotated

Where cards appear: the incident triage queue (triage suggestions) and an incident's CAPA tab after its investigation concludes (CAPA drafts). More agents will add more cards; the rules below apply to all of them.

Anatomy of a card: each names its agent in the header ("Incident Triage suggests", "CAPA Drafting has drafted a plan") with a timestamp, leads with its reasoning, and shows its evidence — similar past records from your own register as links with similarity percentages, each one openable. Proposed values render as live inputs (dropdowns, date fields), not frozen text. The AI never invents a record reference or a person: similar incidents are retrieved, not generated, and proposed action owners come only from your active team roster. The triage card's footer states the contract for all of them: *"Drafted by Incident Triage · you decide."*

Accepting: everything is editable before you accept — values, wording, owners, dates. The record then shows both what was proposed and what you applied, under your name. Accepting is an act *you* perform; the AI merely drafted.

Dismissing: one click, no justification required, permanently recorded. The design principle is that saying no must be effortless — a suggestion surface that is easier to accept than to reject would train

rubber-stamping, and rubber-stamping is what audits exist to catch.

What the AI can never do: apply a signature (the database refuses, for every path, including Provetta's own service role); change a record; act without a person accepting. Every AI call is budgeted per organization and logged with its cost; every suggestion cites the exact model call that produced it.

When the budget runs out: cards say "AI suggestion unavailable — monthly AI budget reached." Everything else works normally. The quiet card is the feature degrading honestly rather than silently.

Appendix 2 — Reference

Record ID prefixes

Prefix	Record
DOC-	Controlled document
NCR-	Nonconformance
SAF-	Safety incident
NM-	Near miss
CMP-	Customer complaint
DEV-	Deviation
CAPA-	Corrective/preventive action
SUP-	Supplier
INS-	Inspection
SCAR-	Supplier corrective action request
INSTPL-	Inspection template

IDs are sequential per organization, assigned by the system, and never reused — a voided record keeps its number forever.

Status colors, everywhere

Green = pass / effective / complete · Amber = due soon / conditional / in progress · Red = fail / overdue / suspended · Grey = draft / neutral. Color is reserved for meaning — if it's colored, it's telling you something.

Some modules carry richer vocabularies on the same palette: the training matrix's legend has six states (**Completed, Due soon, Assigned, Overdue, Expired, Not required** — that last means the item doesn't apply, not a gap), and a SCAR wears two chips at once — its status (Draft, Sent, Responded, Closed) beside its timeliness (Overdue), with the due date. Type labels appear in plain words with the term attached ("Corrective — stop this recurring").

Keyboard

Ctrl+K (Cmd+K on a Mac) — global search from anywhere · Ctrl+Enter (Cmd+Enter on a Mac) — submit the form you're in.

Support access

If Provetta support ever accesses your organization, it is time-boxed, visible at **Settings** → **Support access**, attributed by name on your audit trail, and revocable by your admin. An empty page there means it has never happened.



The quality system your team actually wants to use.

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