PROVETTA™

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

Provetta is operated by AZR Tech-Solutions LLC (d/b/a Provetta). This workbook describes the product as deployed at provetta.ai on the edition date; screens in your organization may differ where your configuration differs. Screenshots depict a demonstration organization; any resemblance to real companies, products, or persons is coincidental.

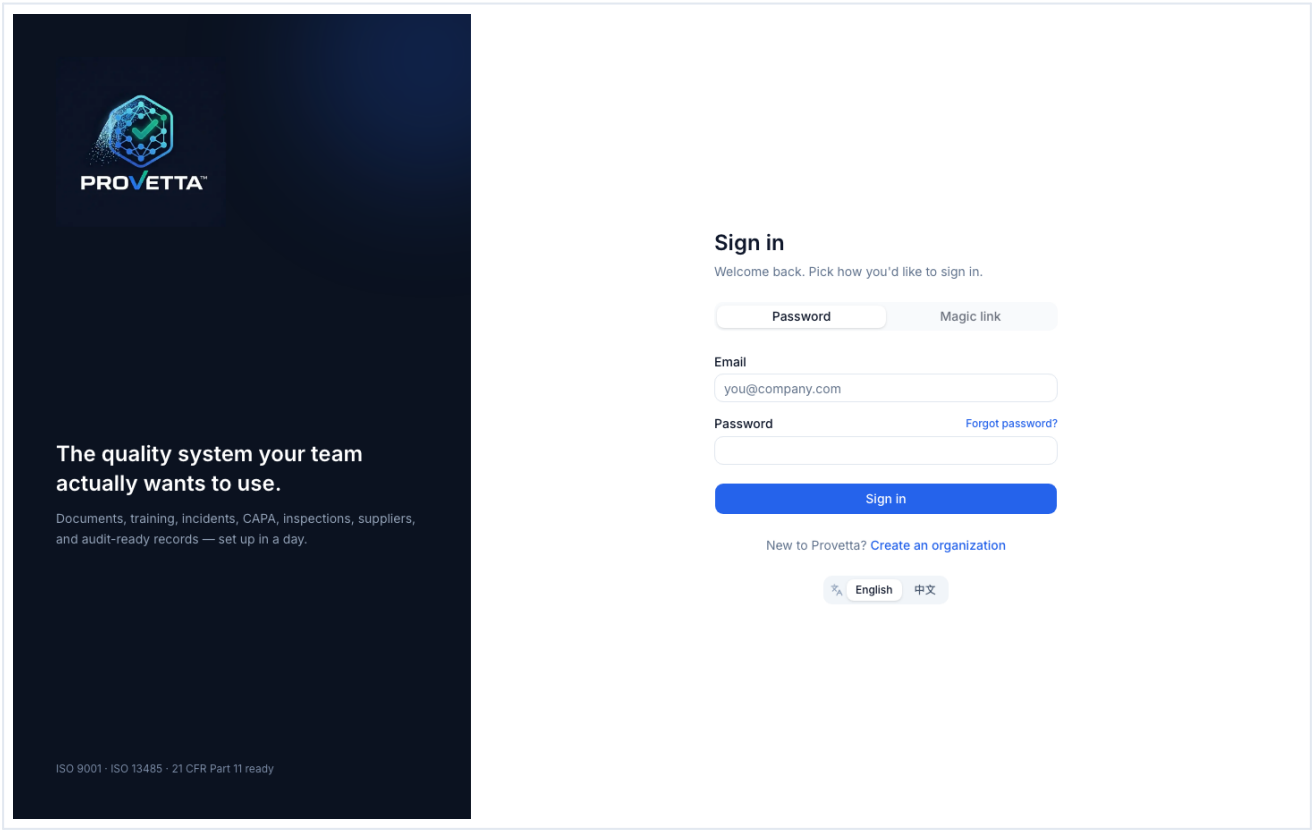
Welcome

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.

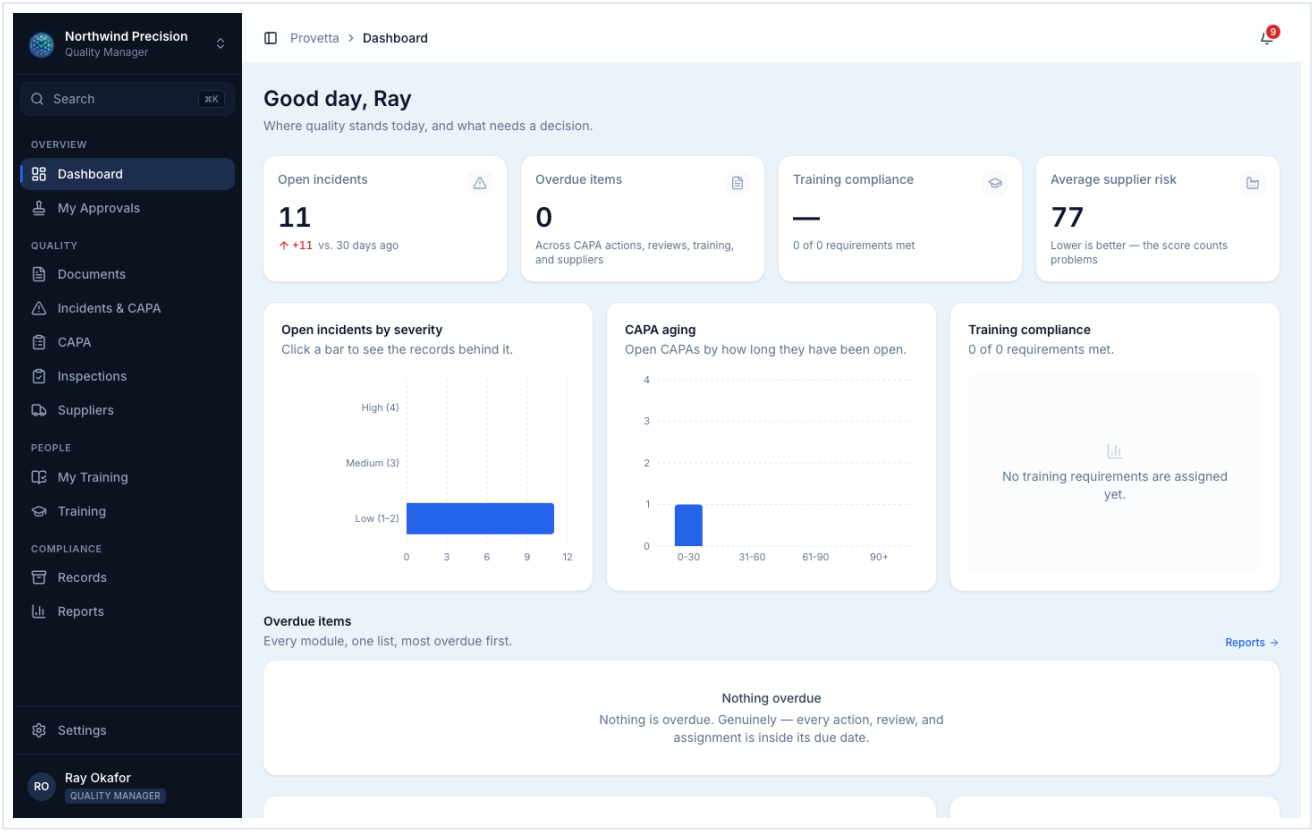
Signing in and finding your way

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.



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

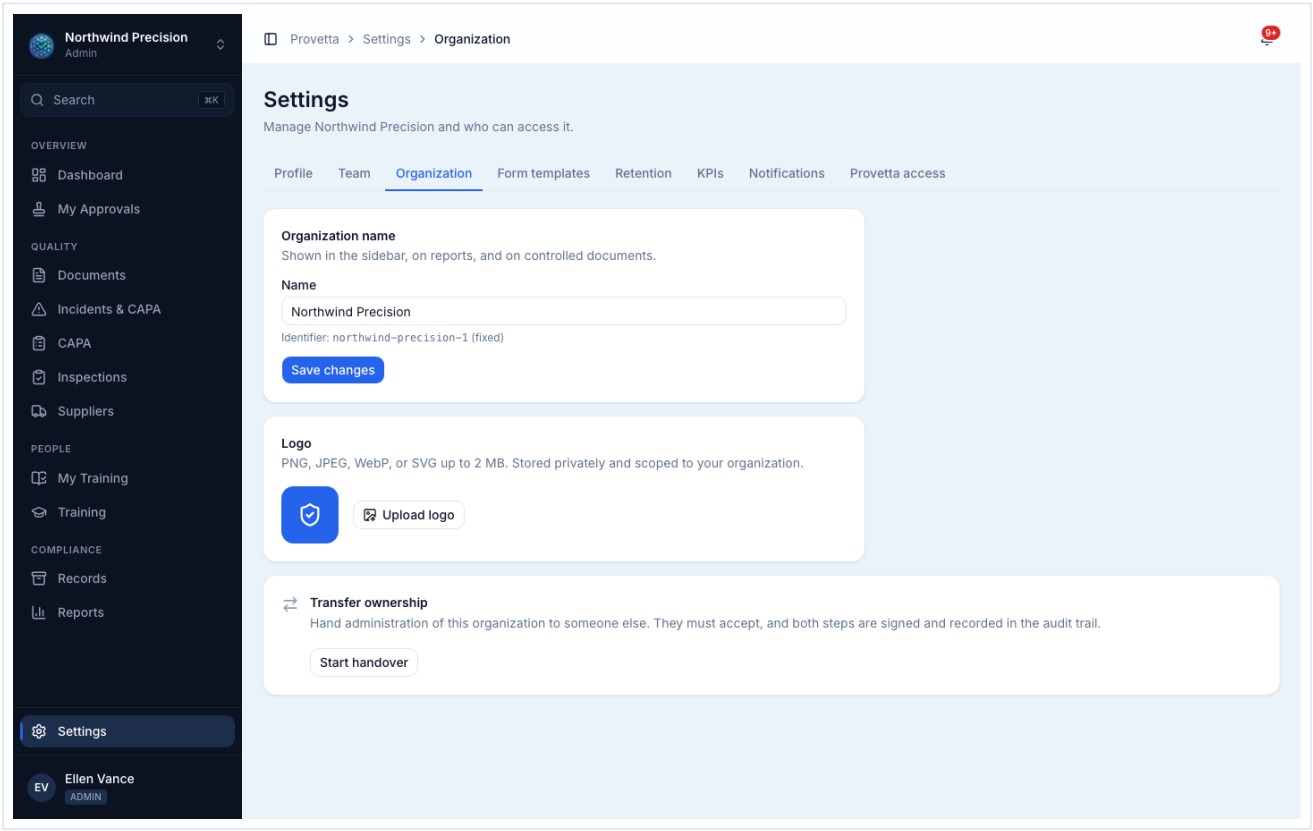
- **The trail is permanent.** Every create, change, and status move is recorded, attributed, and kept. Records are archived or voided, never erased — an audit trail with holes is not an audit trail.
- **Signatures mean something.** Signing re-asks for your password with the signature's stated meaning 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

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

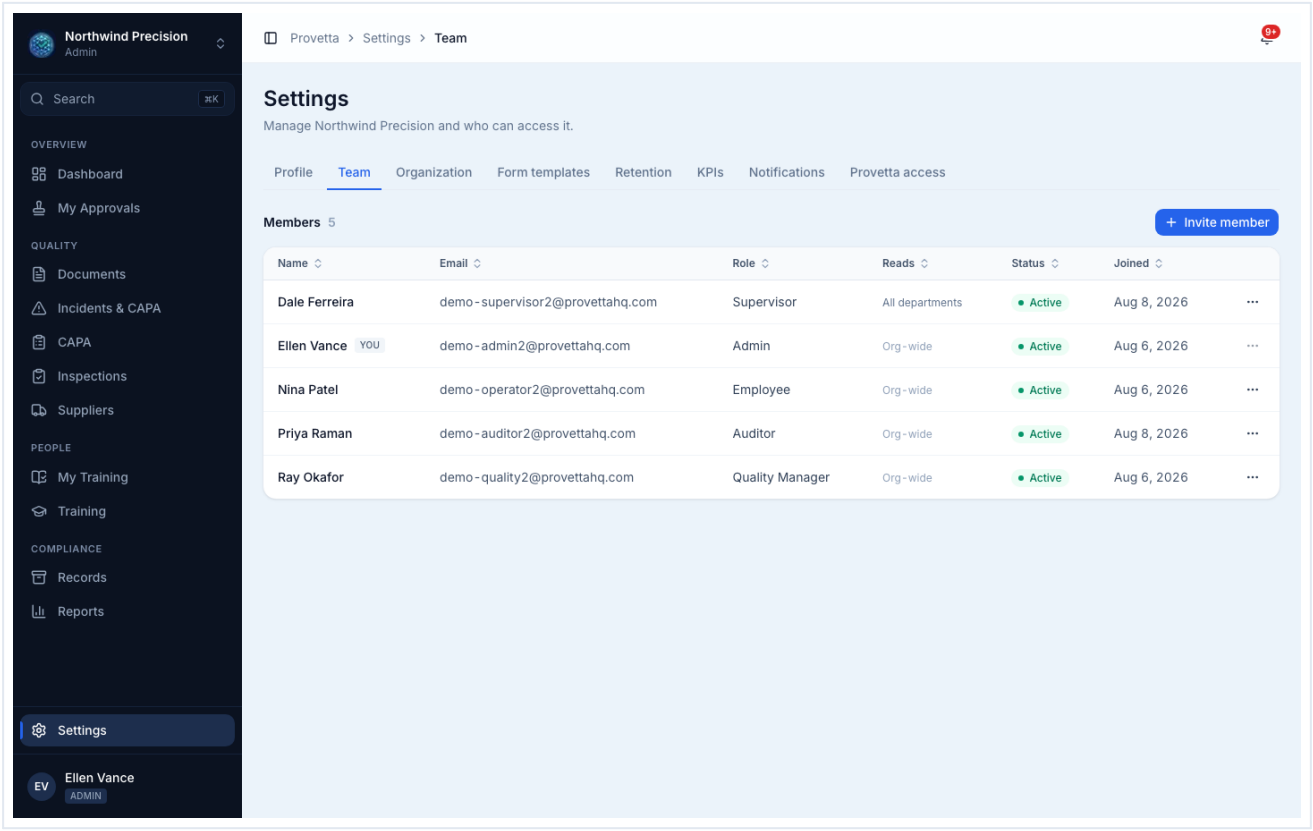
Role	What they can do
Admin	Everything, including settings, invites, and role changes.
Quality Manager	Runs the quality system: approvals, signatures, triage, CAPAs, suppliers, training administration. Cannot invite users or change org settings.

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.



Team list showing the five-role roster

A2.3 Changing a role, deactivating a member

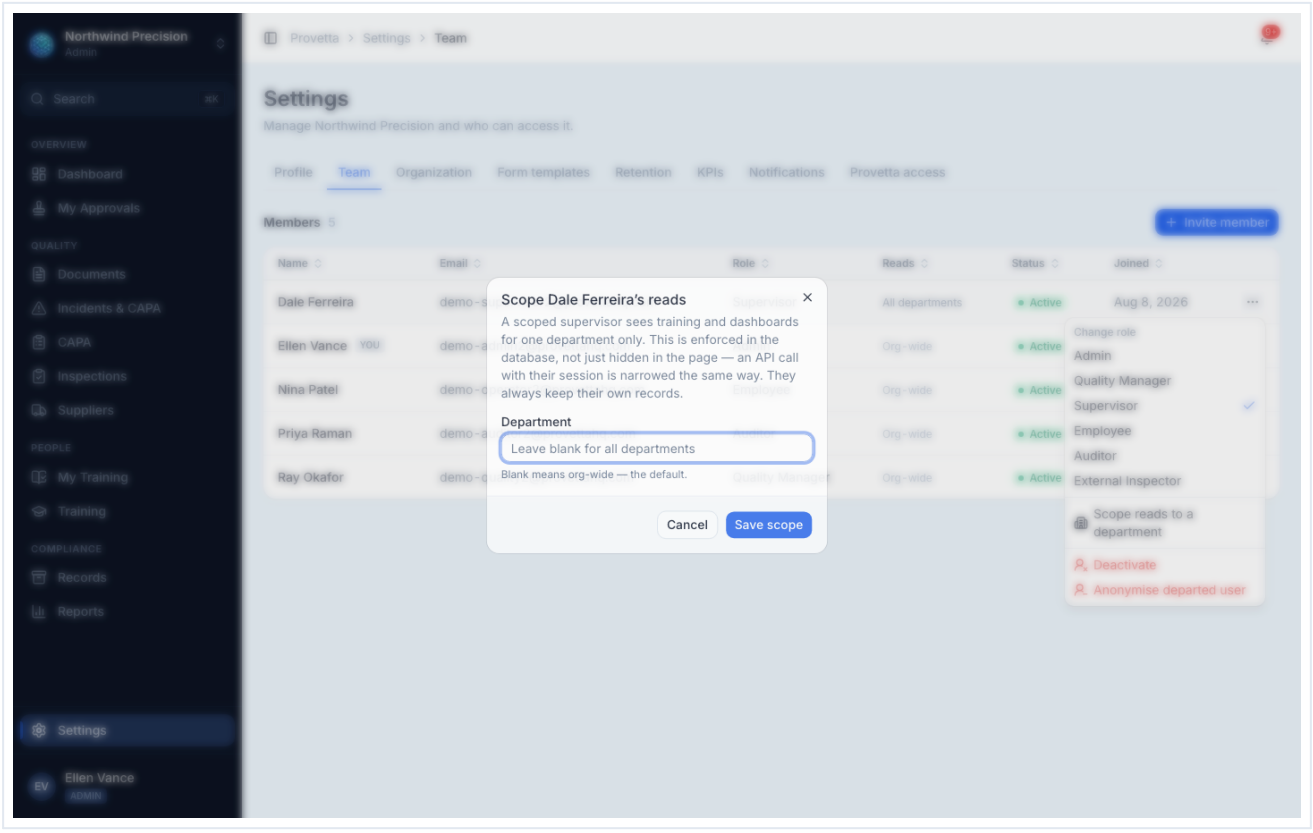
Both from the member's row menu. Deactivation takes effect immediately — it is enforced by the database, not by hiding buttons. Two protections you'll meet:

- **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

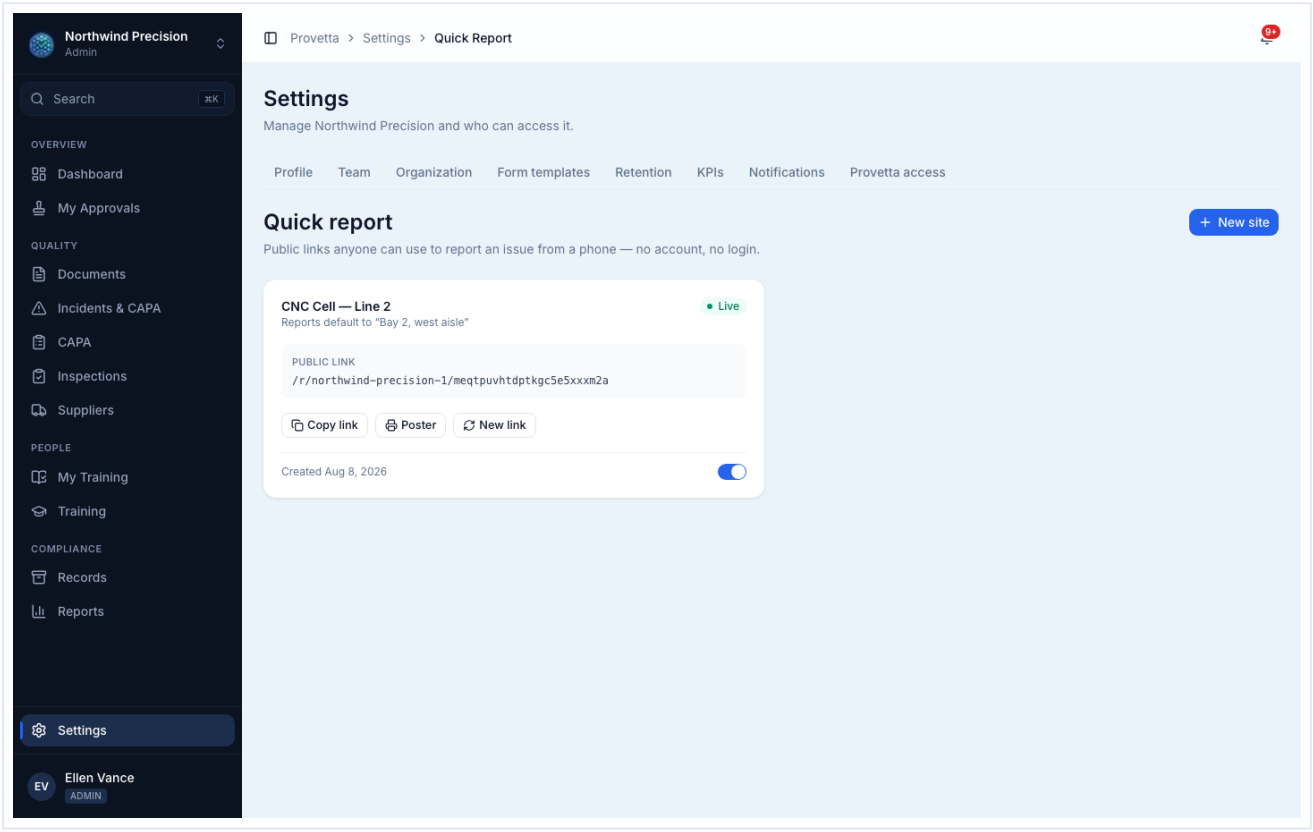
The **Reads** column on the team page shows each supervisor's access scope. "All departments" means unrestricted; **Scope reads to a department** (row menu) restricts what they can *see*, enforced at the database layer. This is an access boundary, not a label — the dialog says so, and it means it.



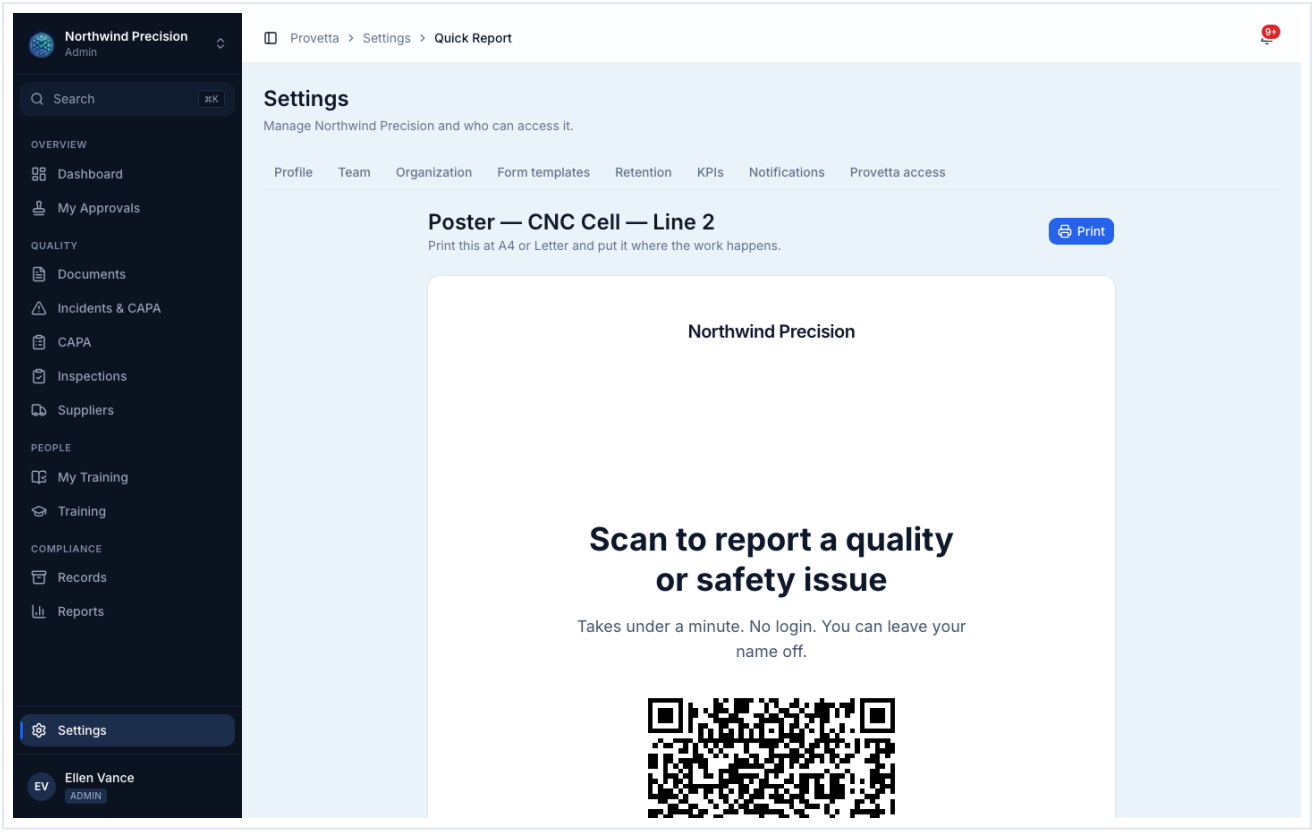
Scope dialog open

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.



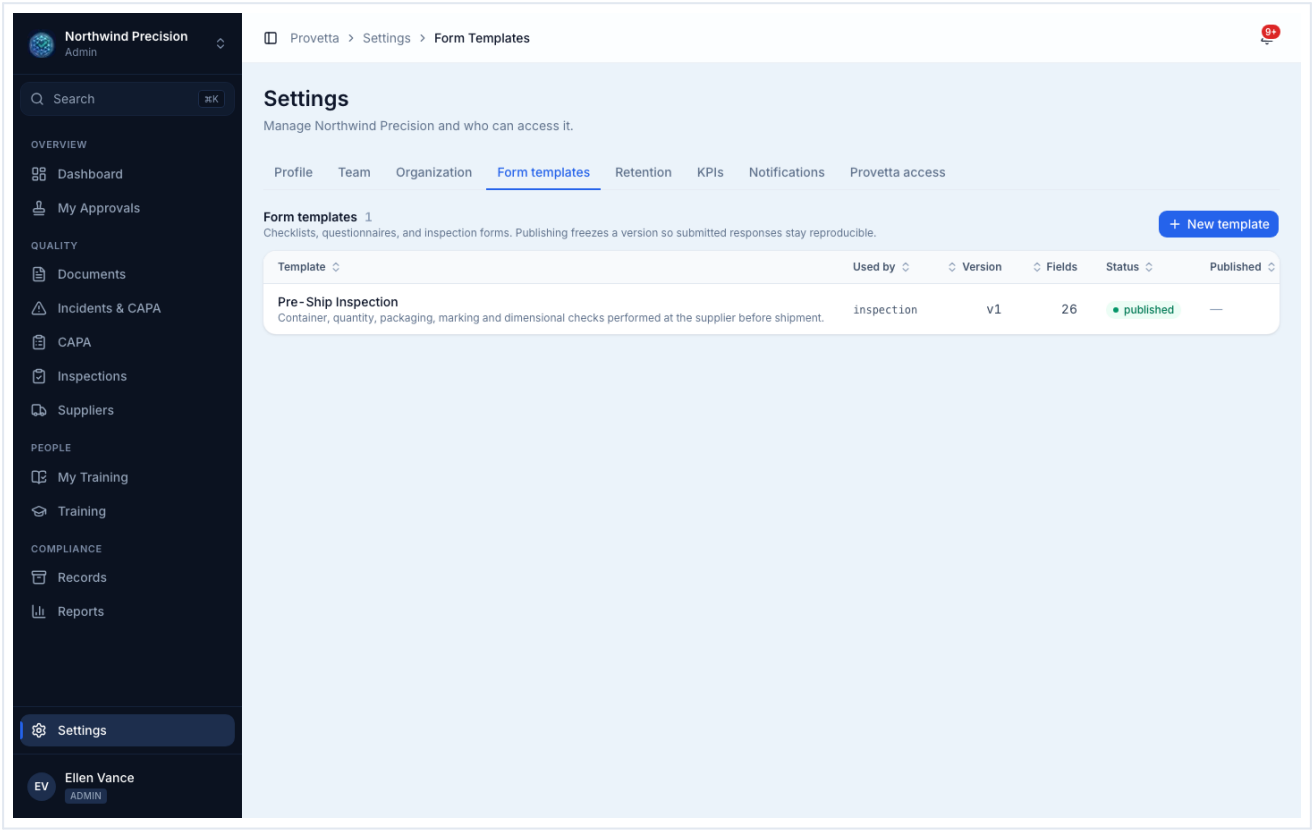
Postings list



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.



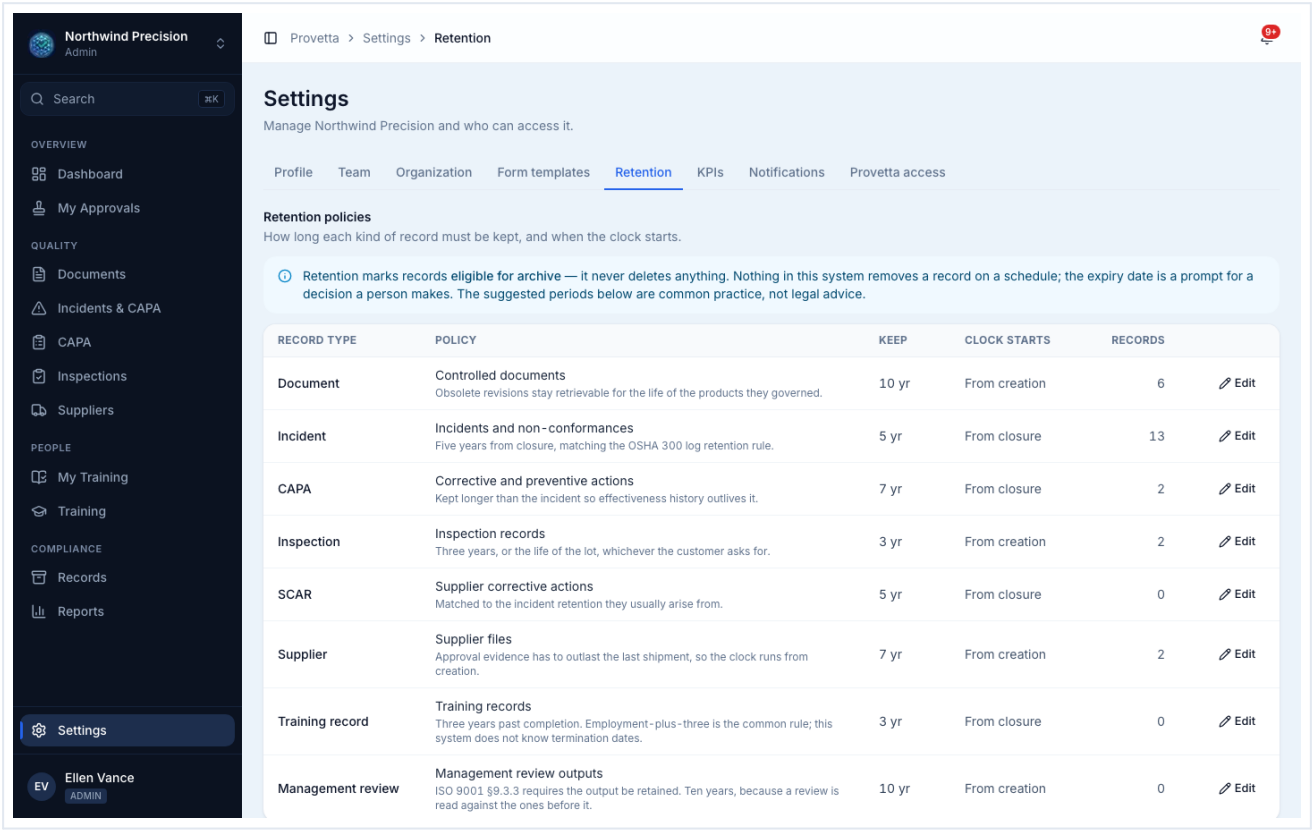
Template editor

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.

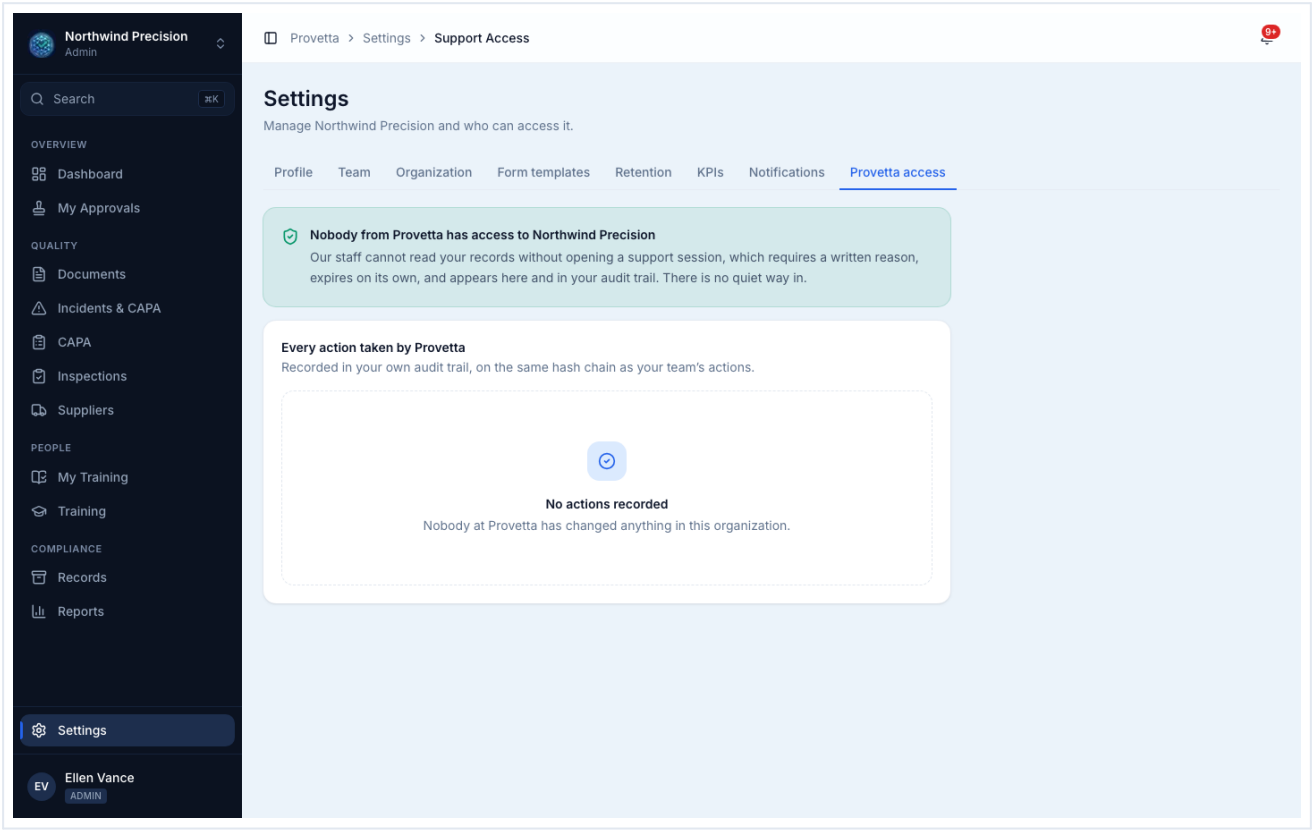


Retention policy list

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

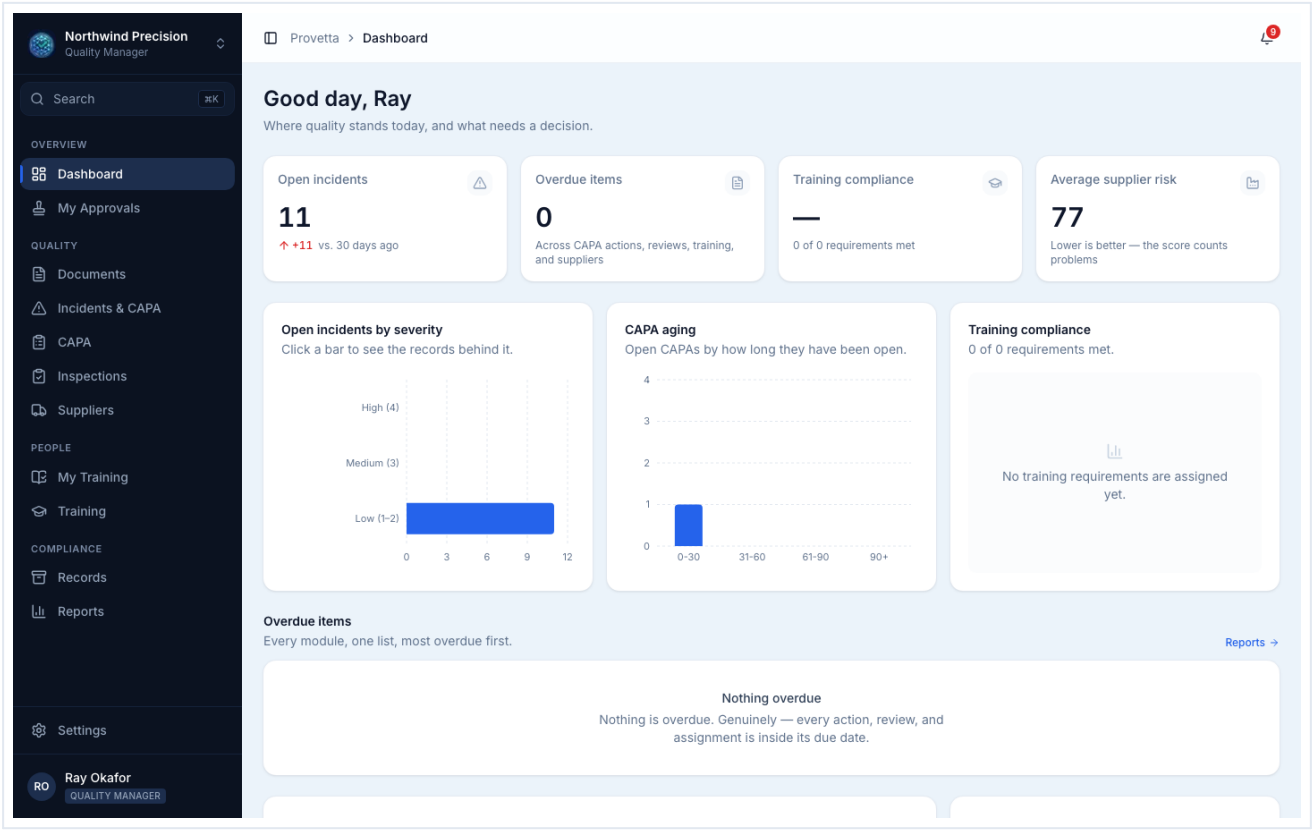
A8. Transferring ownership

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

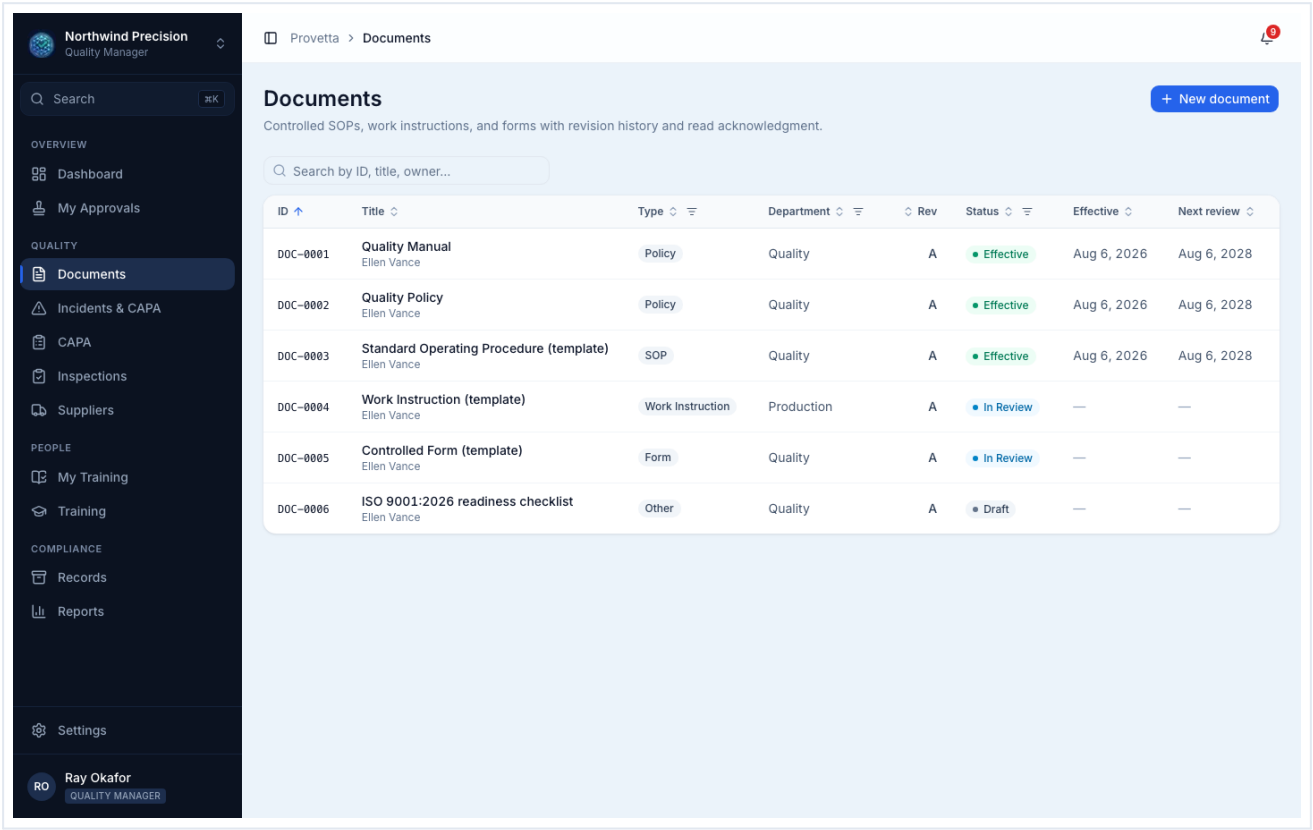
The dashboard is your morning view: KPI cards across the top (open incidents, overdue CAPAs, documents awaiting review, training compliance), then the work that needs a decision. Every number is a link — click through to the filtered list behind it.

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.

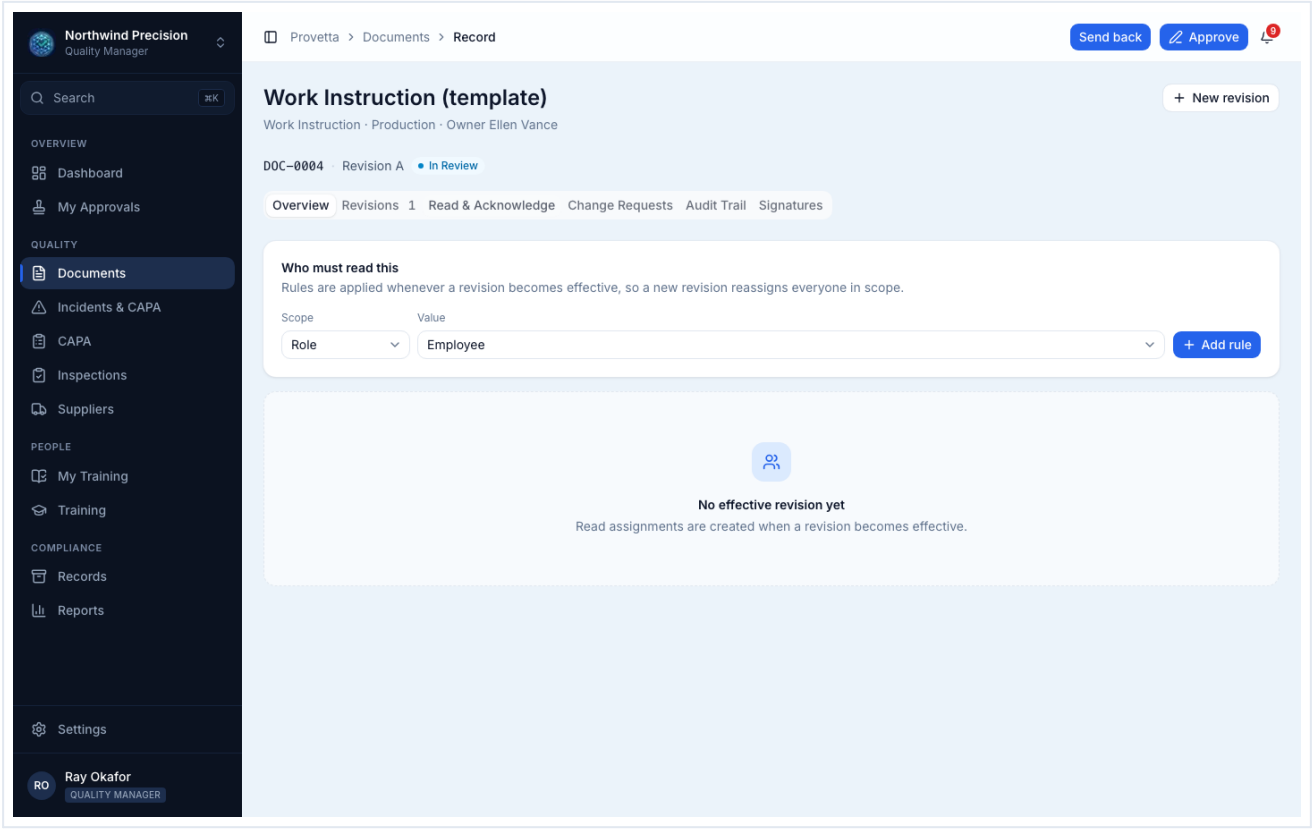
B2.3 Sending for review and approving with an e-signature

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.



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

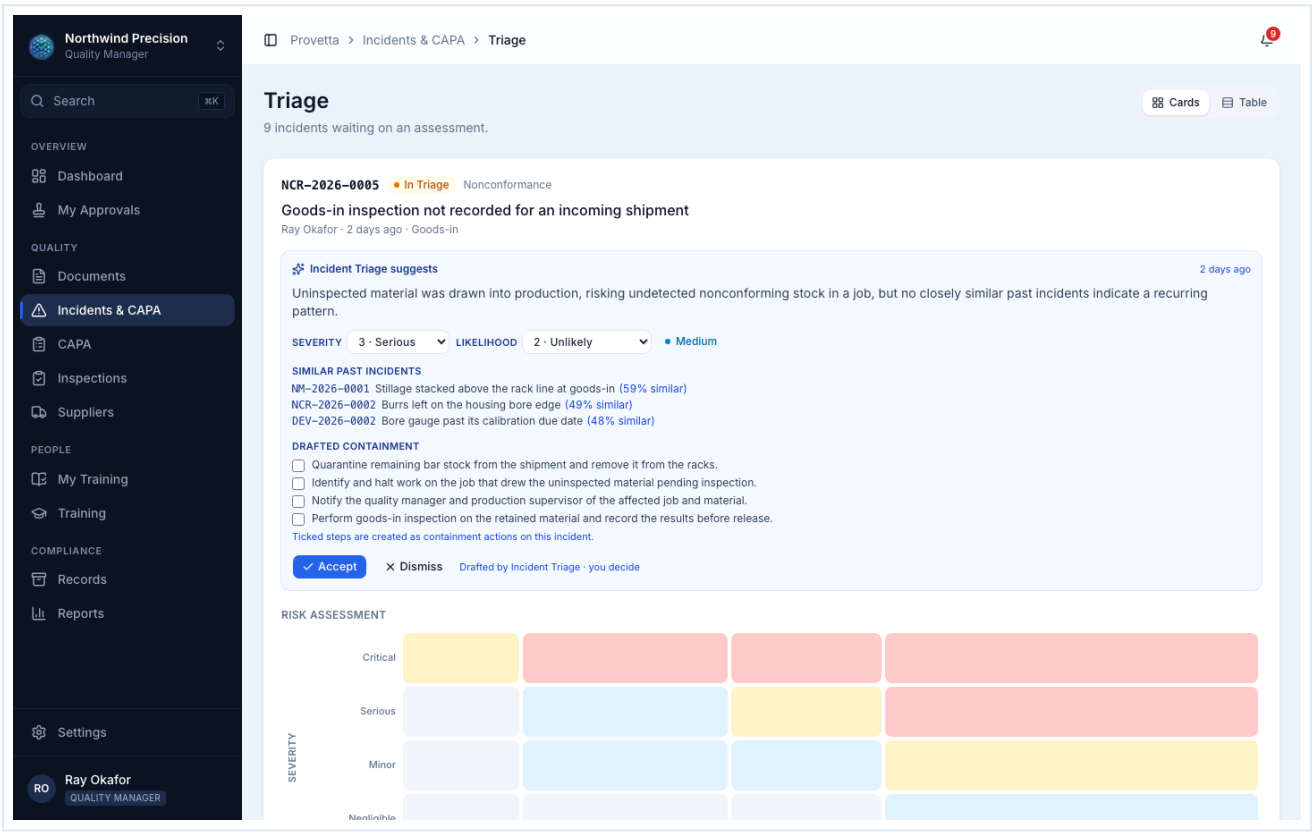
B3.1 Where incidents come from

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).

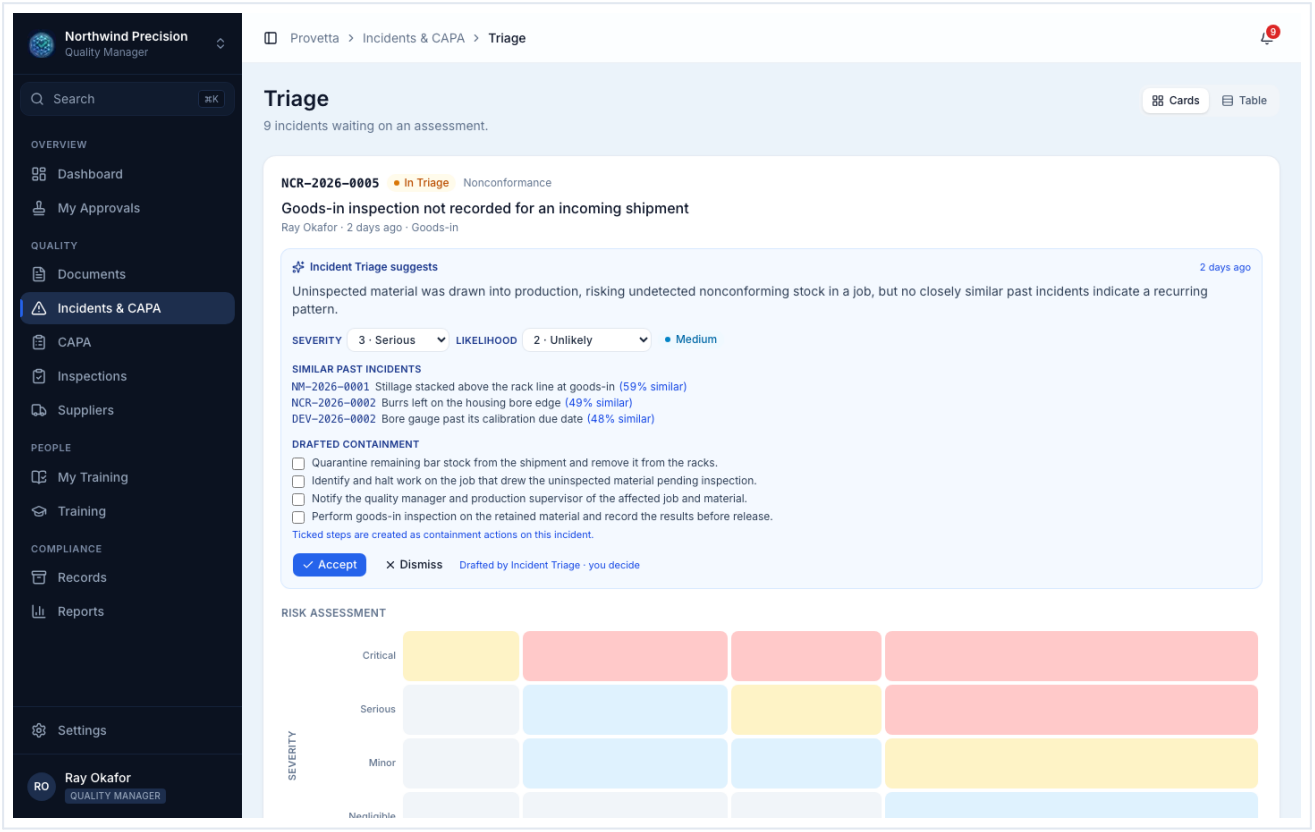
B3.2 The triage queue



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



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.)

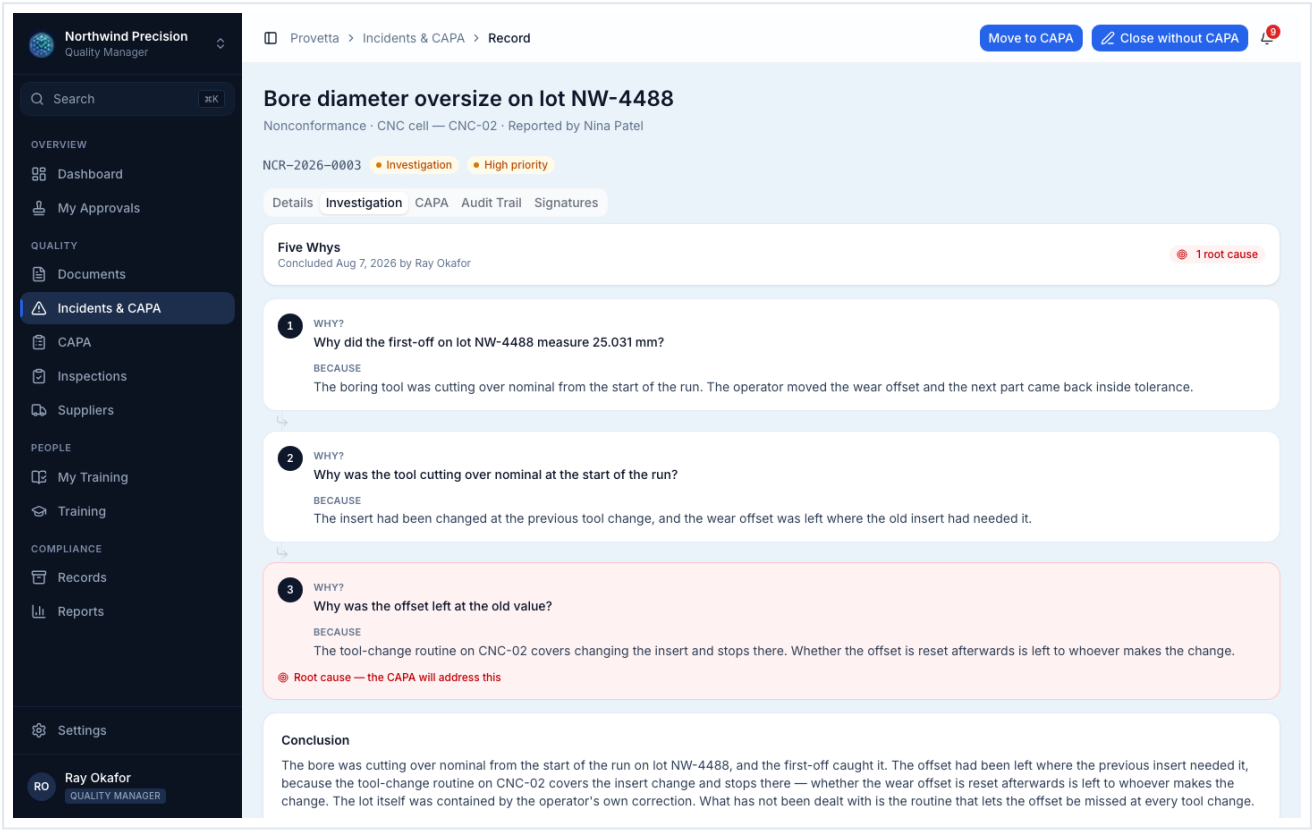
B3.5 Containment

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**.



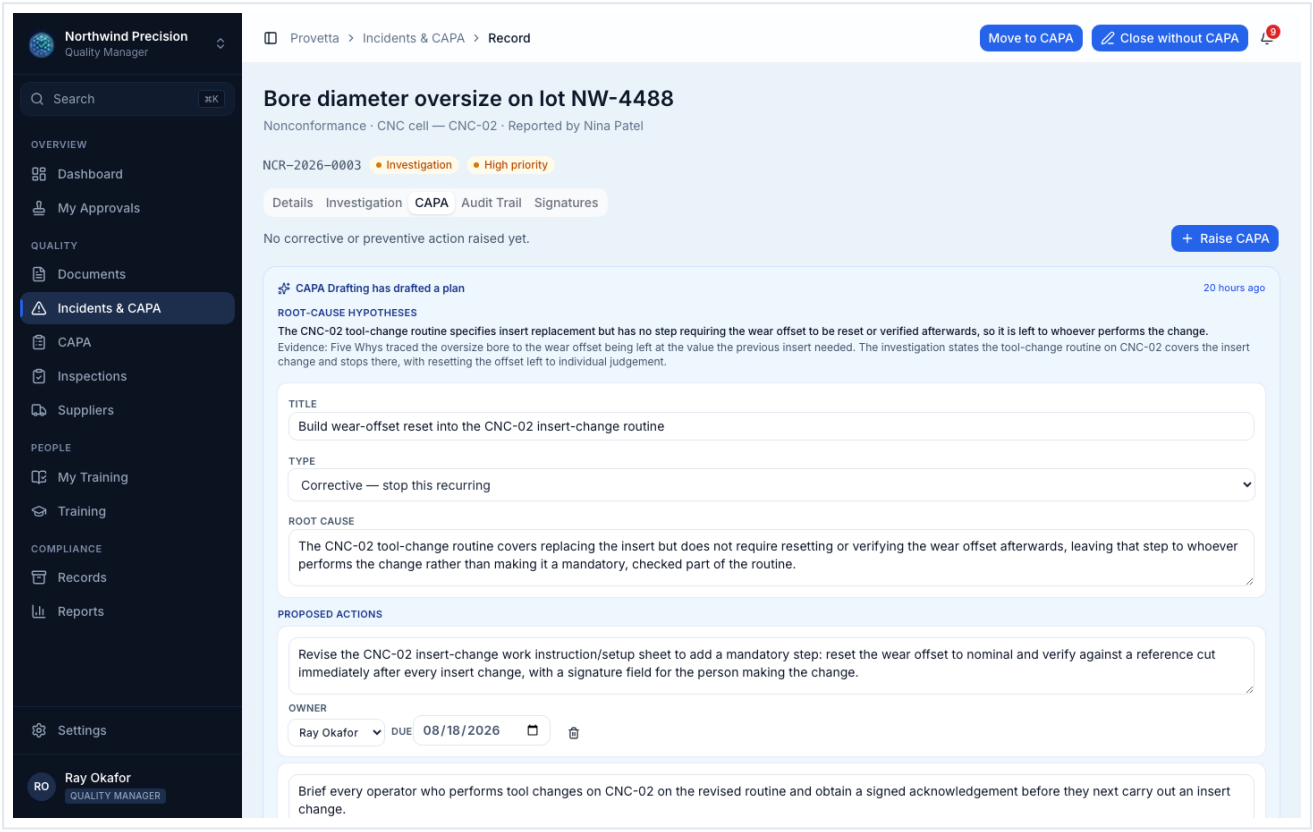
Investigation tab, Five Whys chain with a root cause marked

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

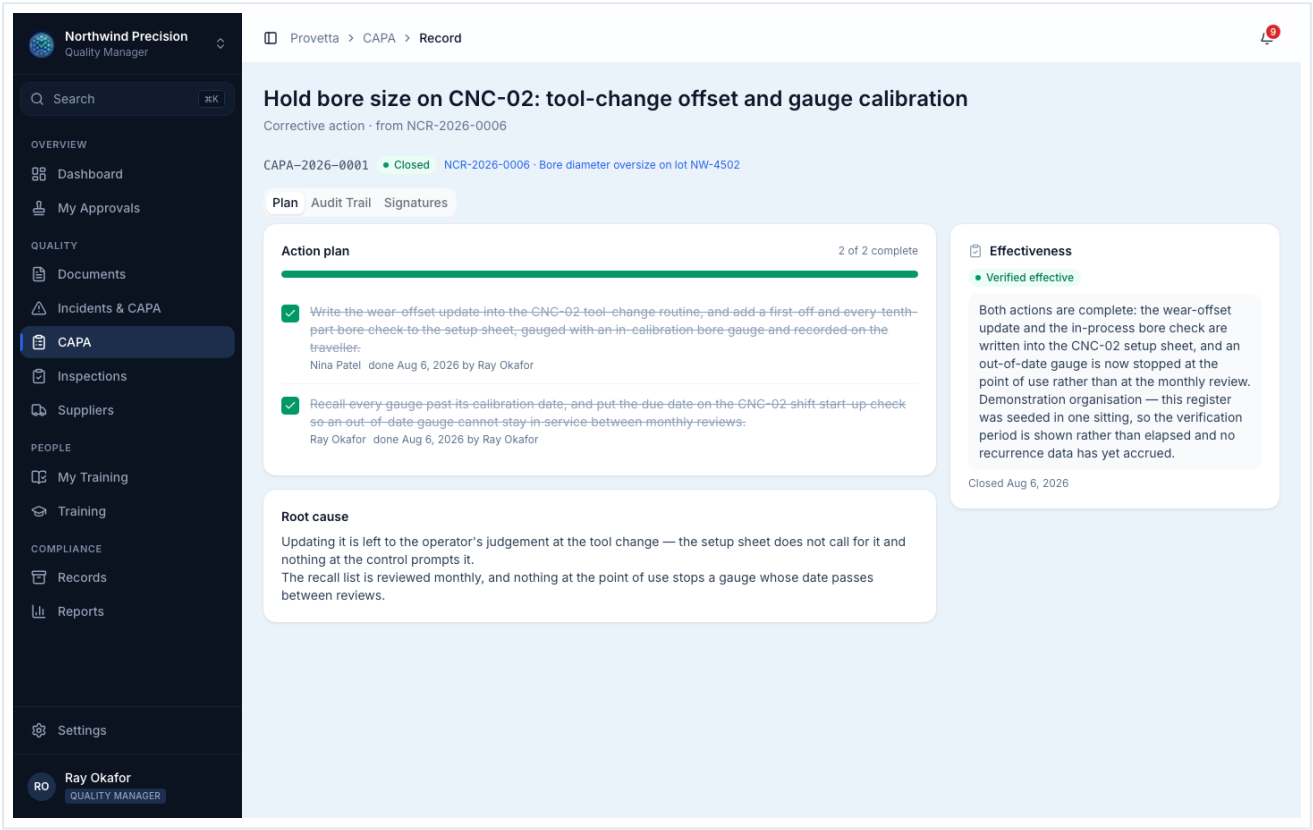


CAPA tab with the AI draft card: proposed actions with owners and due dates

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.



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.

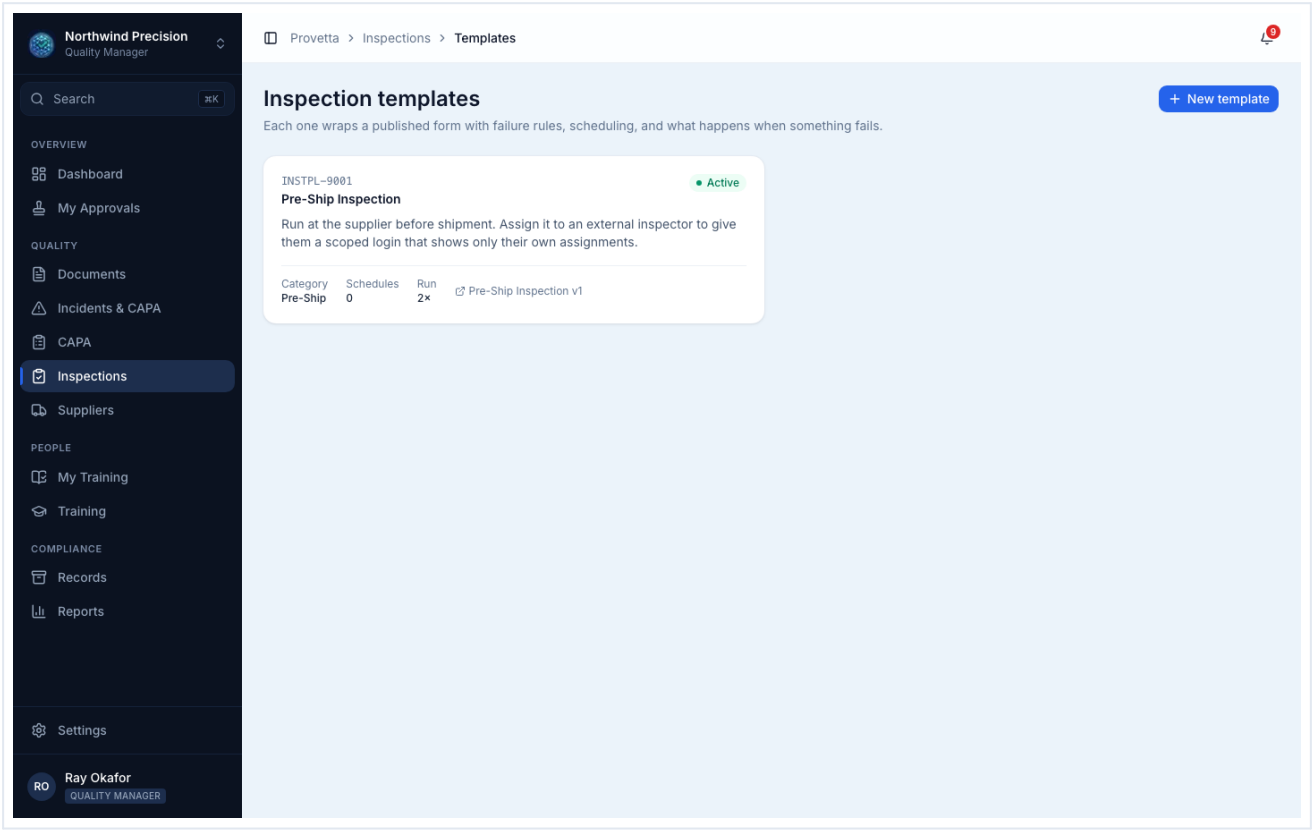
B4.5 The OSHA log

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

B5. Inspections

B5.1 Templates and schedules

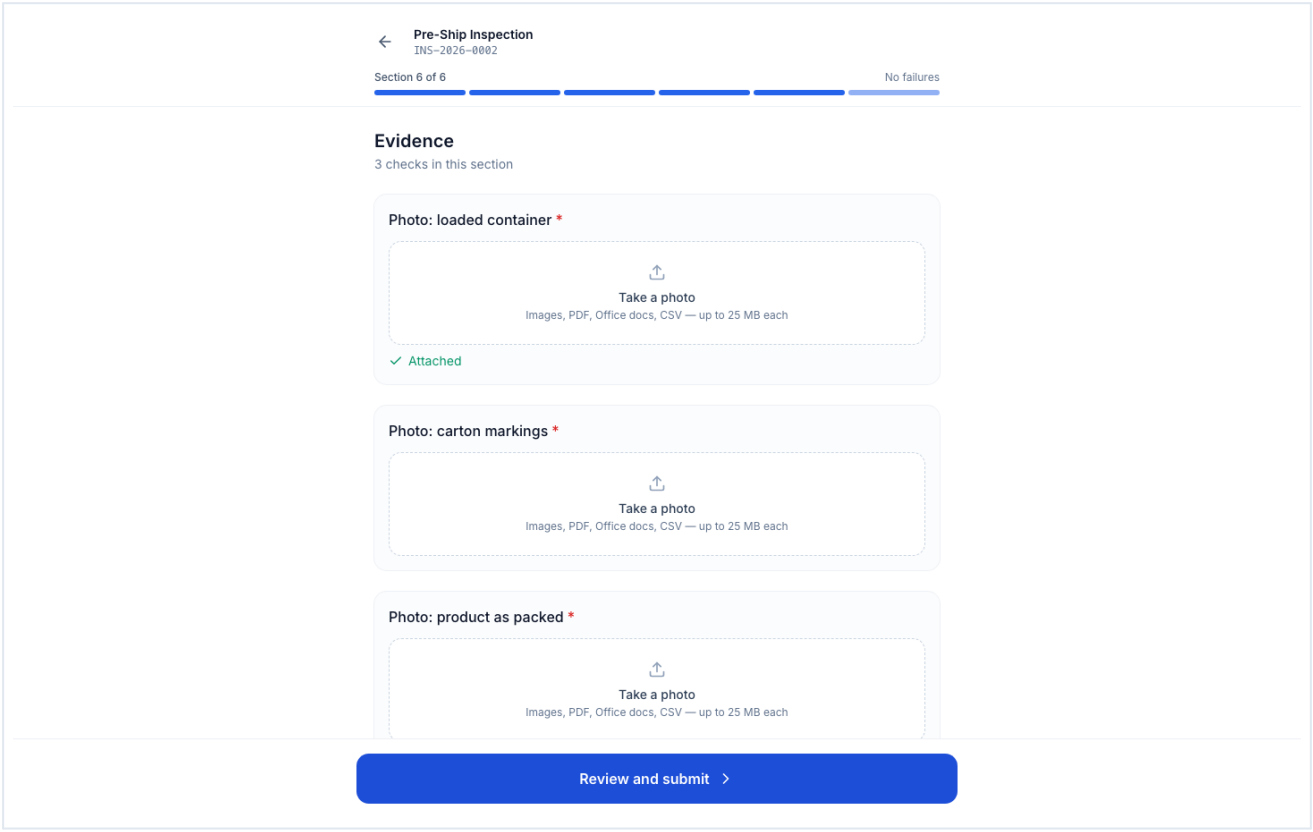
Inspection templates (checklists) are built in **Settings** → **Form templates** (or start from the provided ones, including the Pre-Ship Inspection). Schedules materialize inspections automatically and assign them by person or role.



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.



Runner mid-section with a photo answer

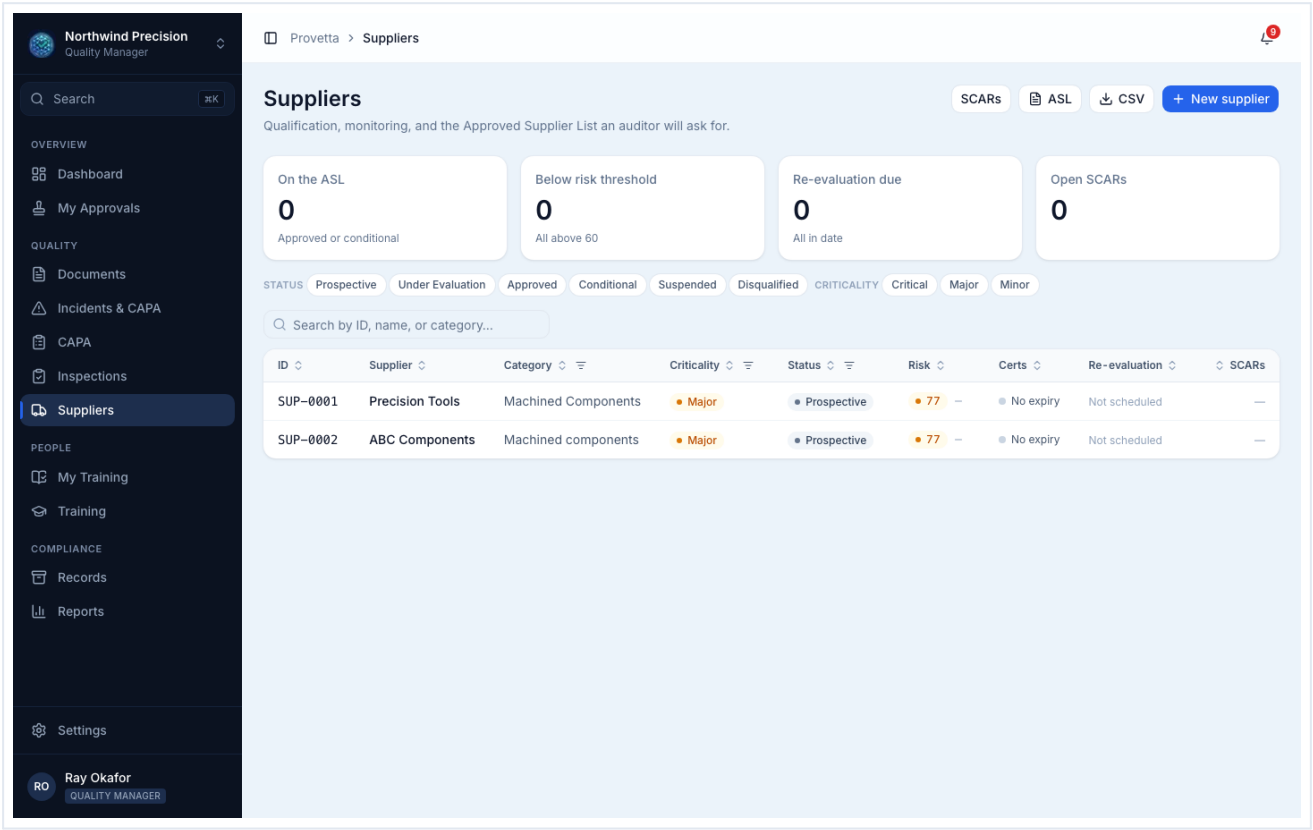
B5.3 Review and verification

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.



Register with mixed statuses

B6.2 The ASL

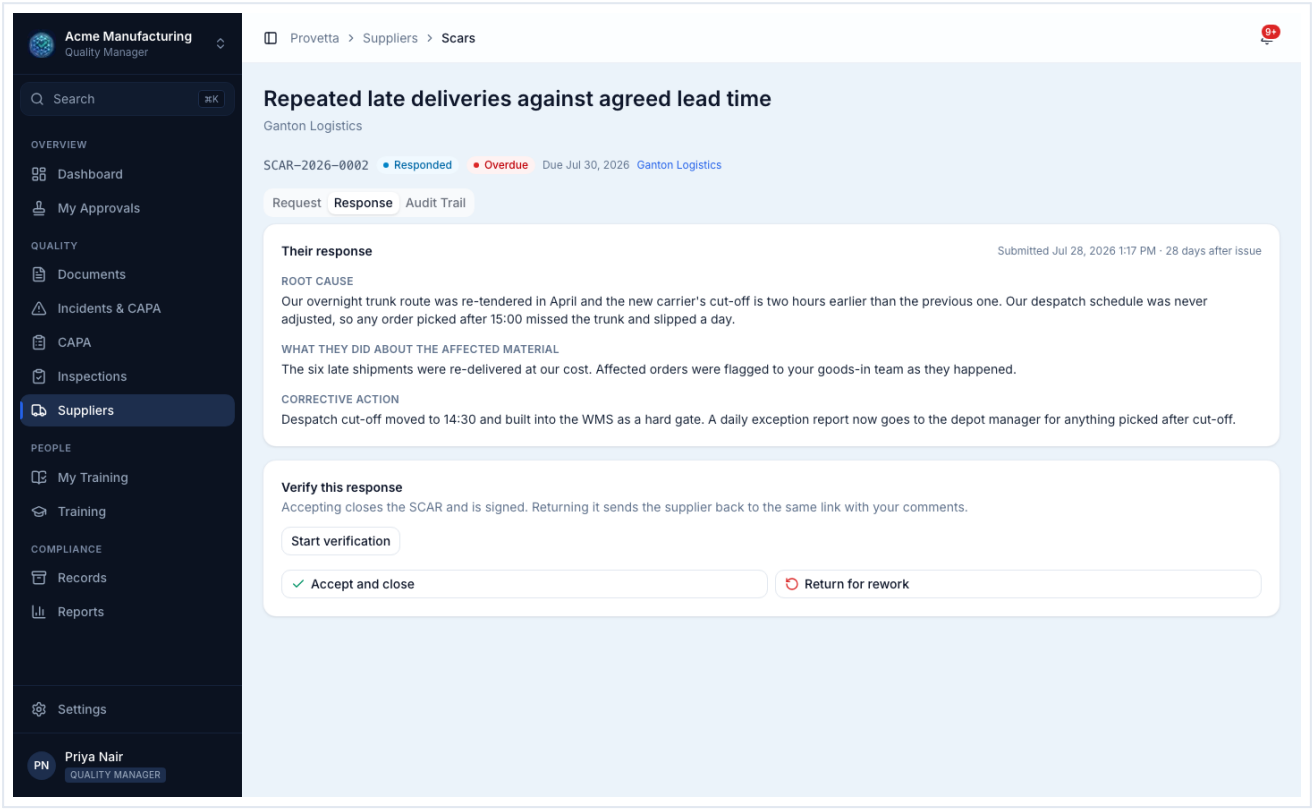
Suppliers → **ASL** is the approved supplier list an auditor asks for — current, exportable, always true because it is generated from the register rather than maintained beside it.

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.



SCAR with supplier response

B7. Training

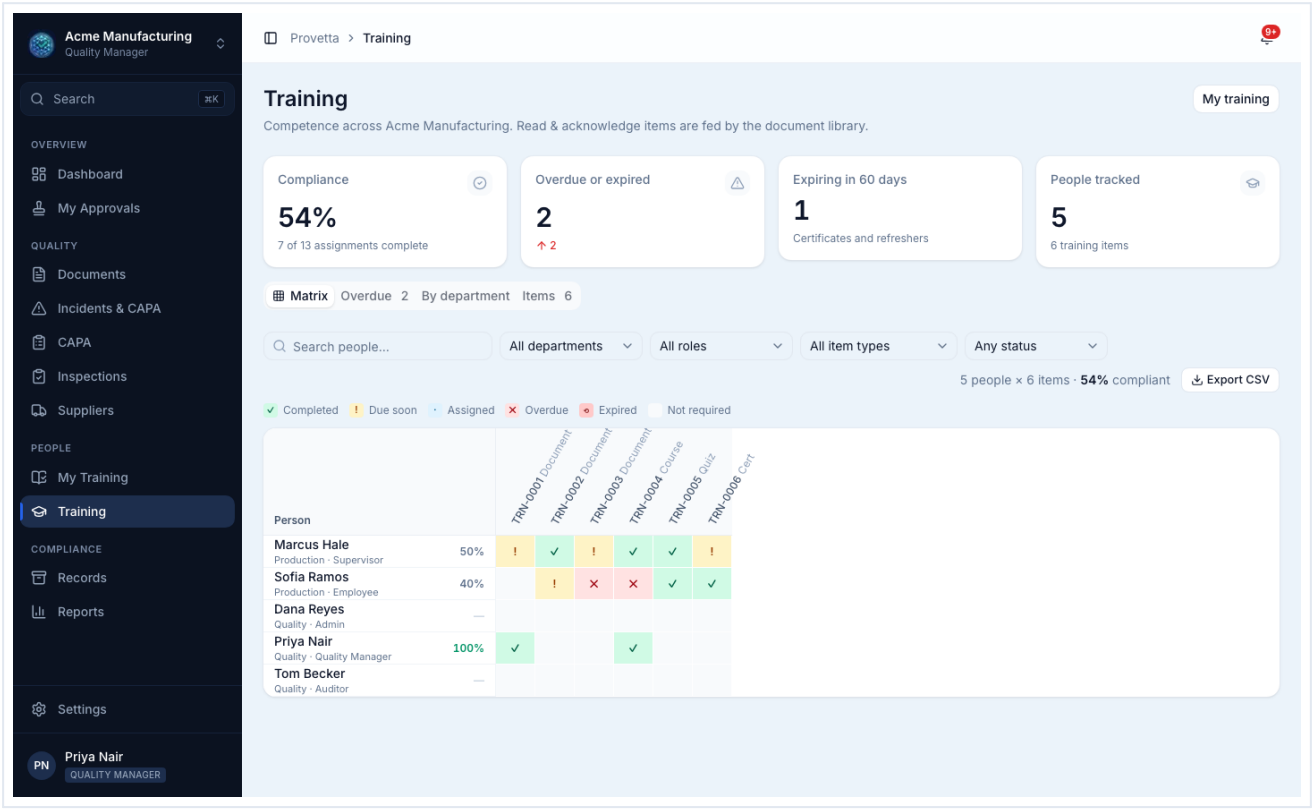
B7.1 Items and assignments

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

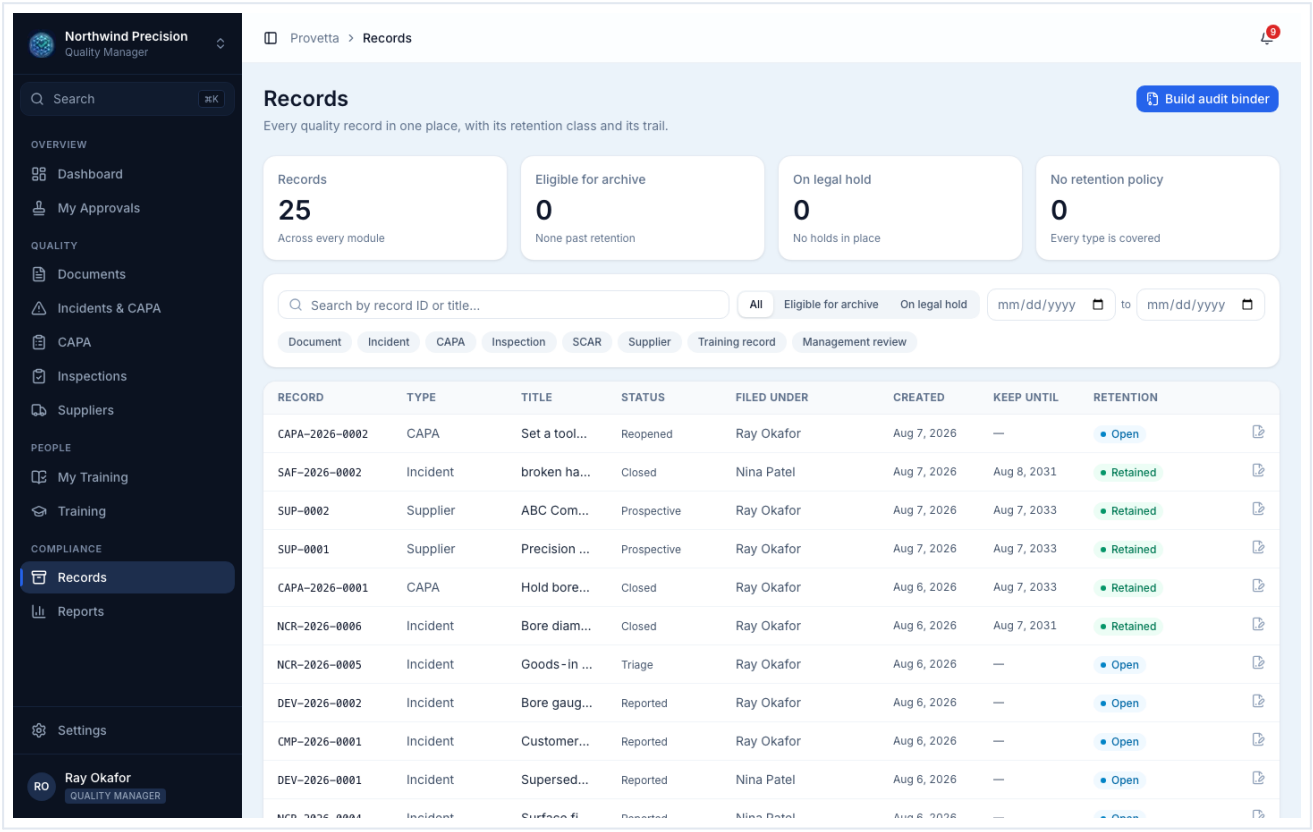


Matrix view: people × items, green/amber/red

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

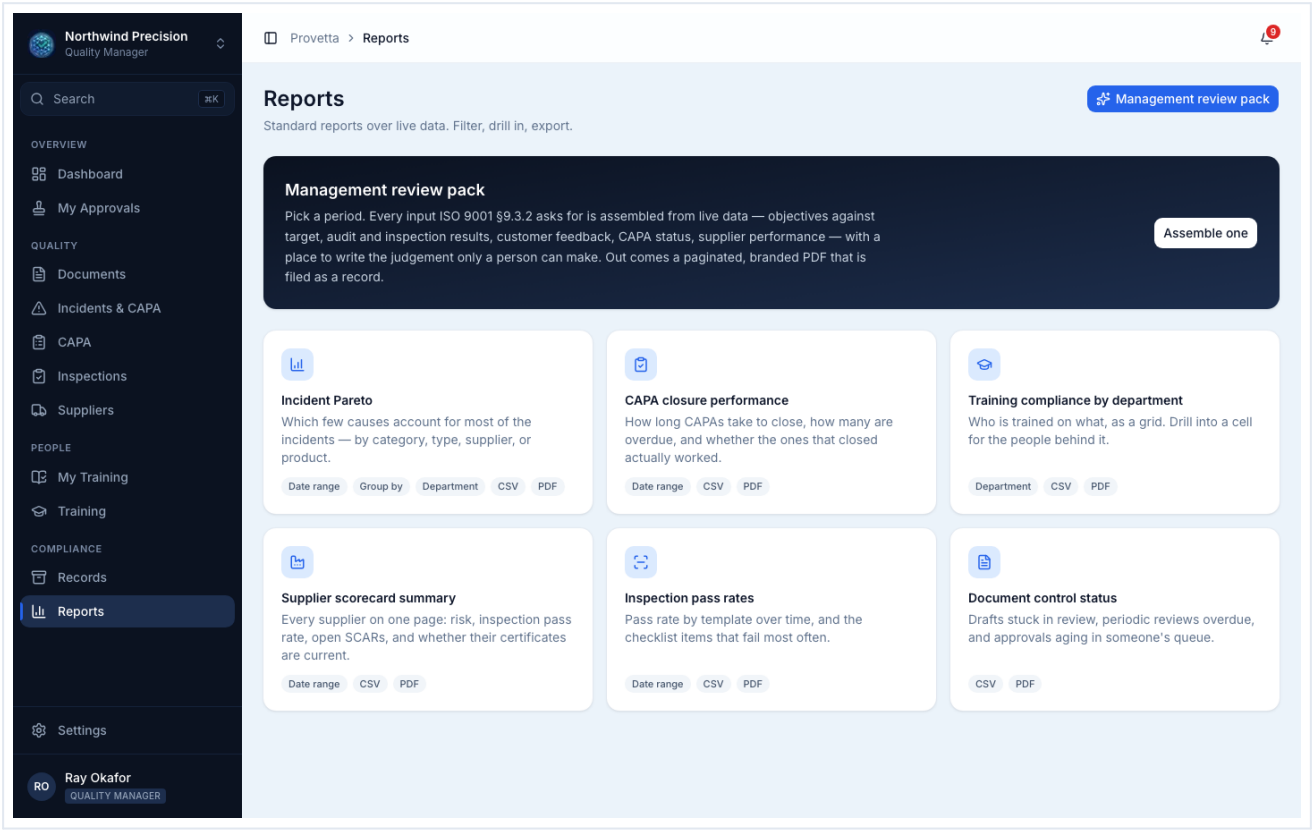
- **Records** is the cross-module registry: every controlled record, filterable by type, status, and retention state.
- **Retention** policies mark what is past its period; legal holds prevent anything under hold from being archived.
- **Audit binders** assemble evidence packages — pick the scope, the 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.



Registry with retention chips

B9. Reports and management review

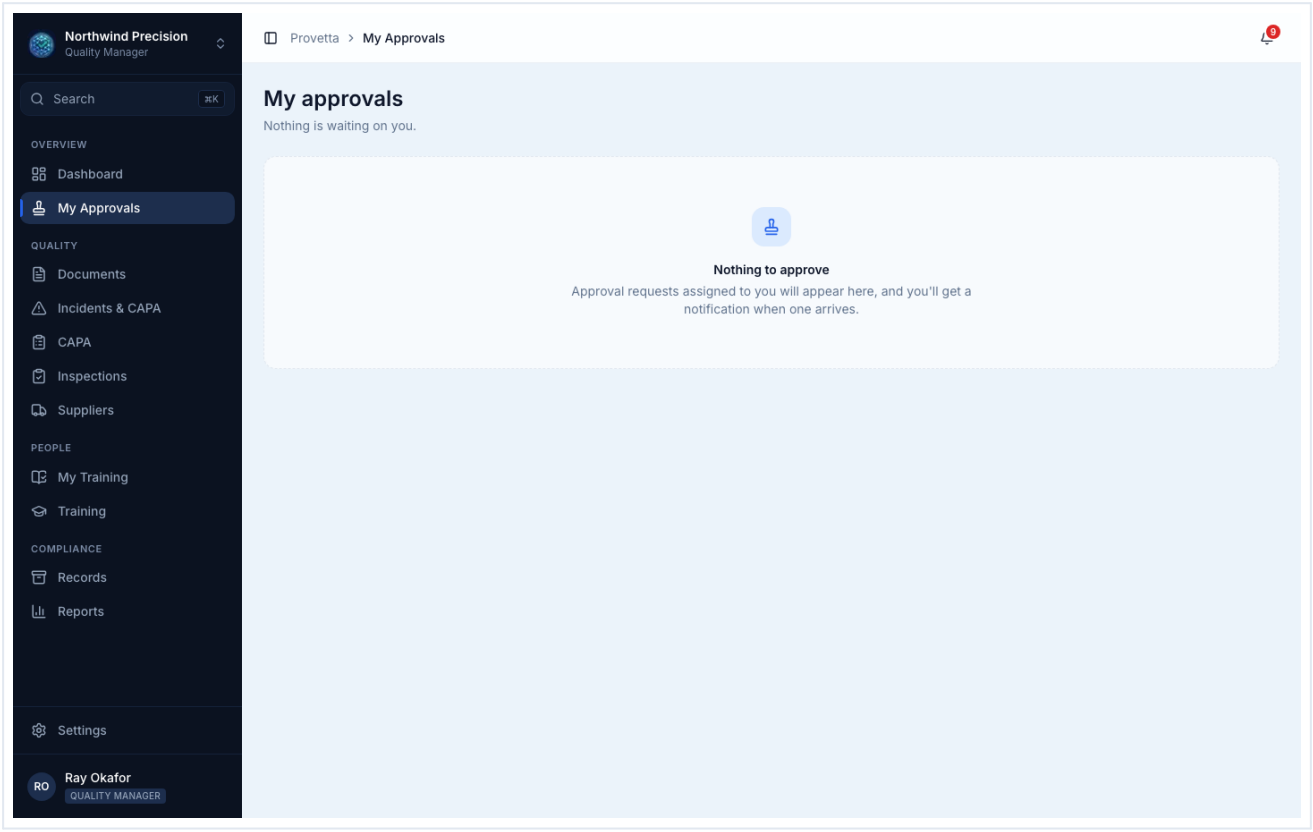
Six built-in reports cover the review agenda: incident trends, CAPA aging, supplier performance, training compliance, document status, inspection results. Each exports. **Management review** assembles the periodic review record itself — inputs, minutes, decisions — as a controlled record.



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.

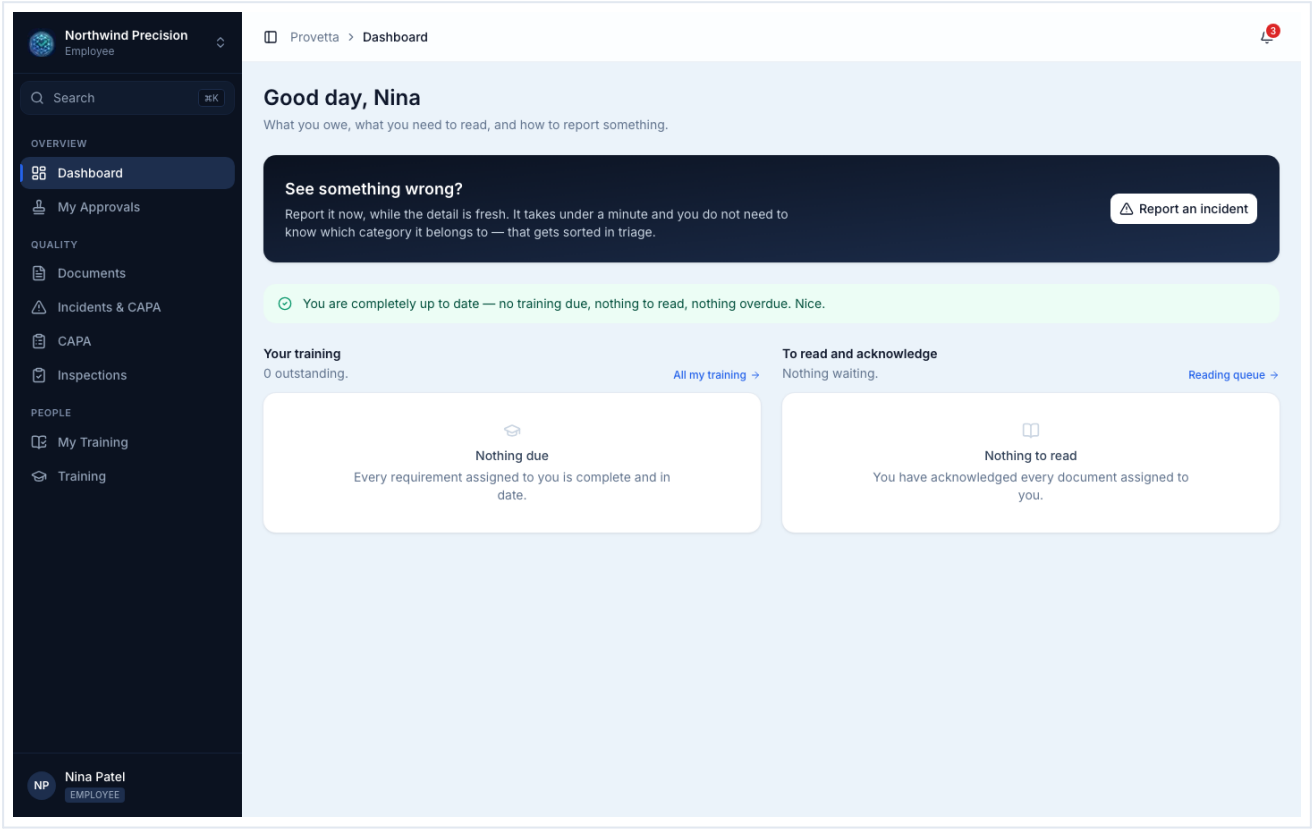


Queue with mixed pending items

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

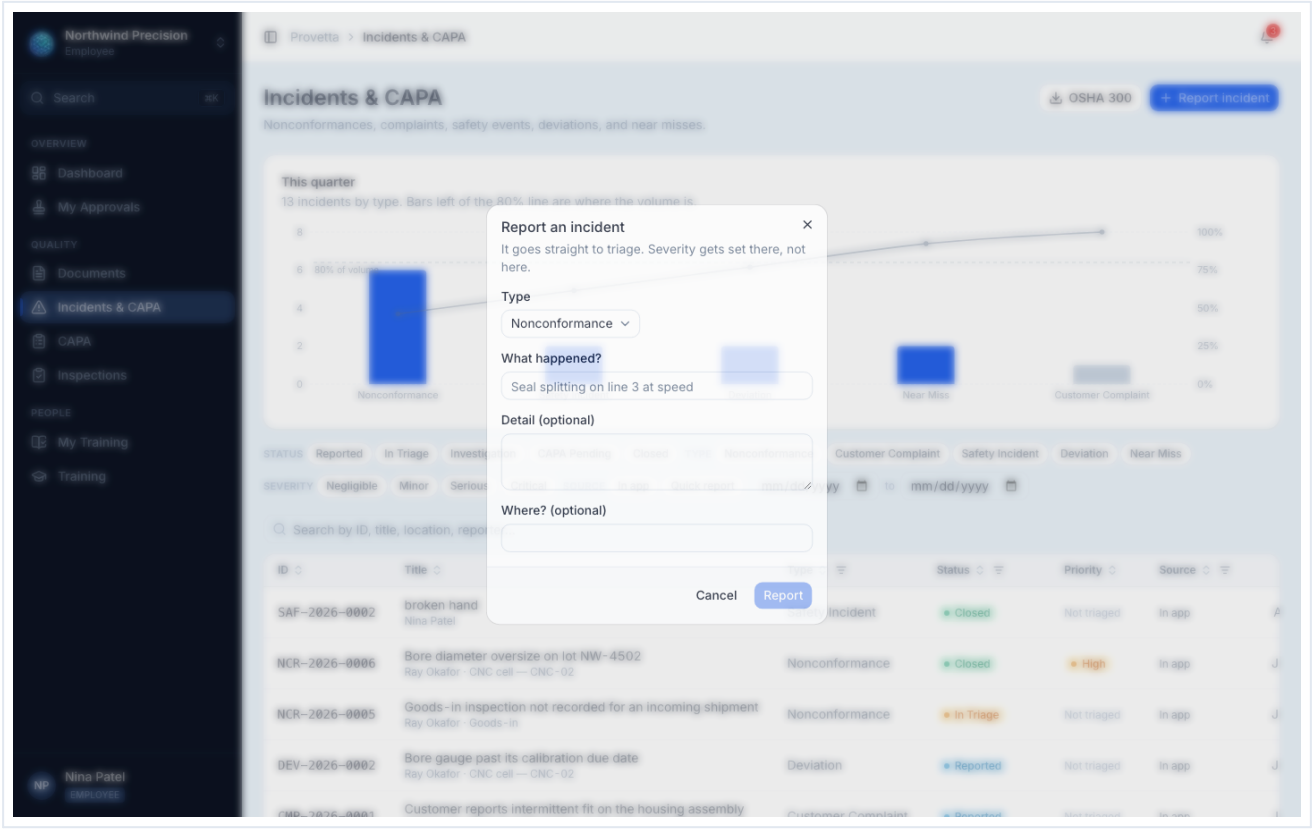
Everything with your name on it, in one place: inspections assigned to you, training due, CAPA actions you own, documents waiting for your read acknowledgment. If it's not here, it's not yours to do.

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.

3. 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.
4. 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.



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

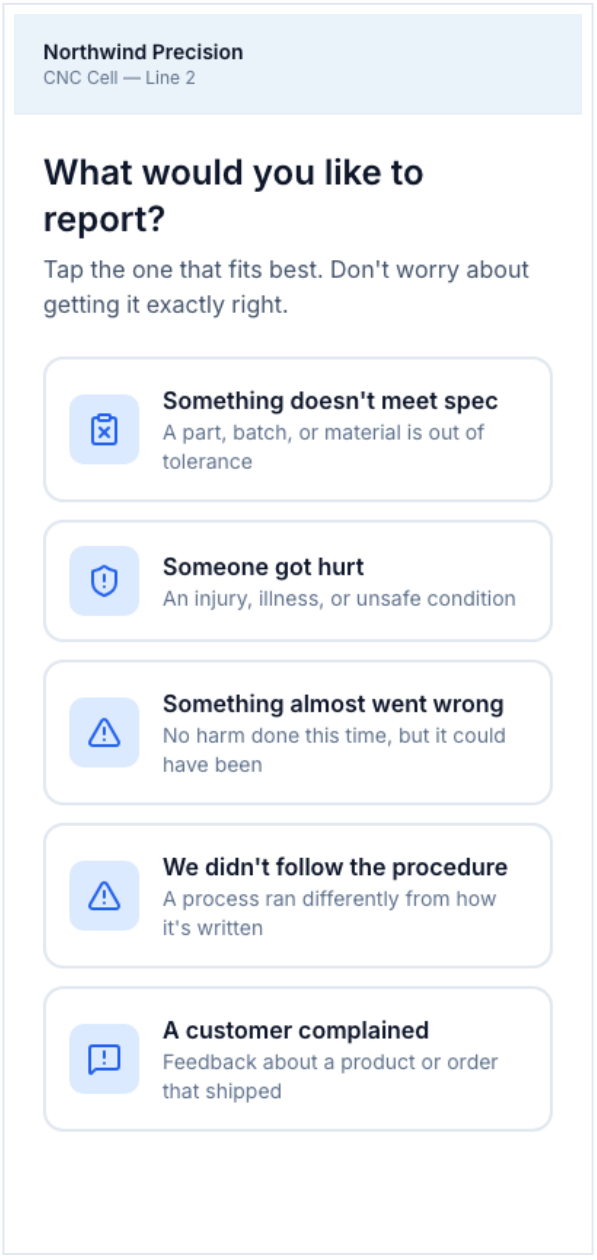
Near the QR posters on the floor:

1. **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.
2. **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*:

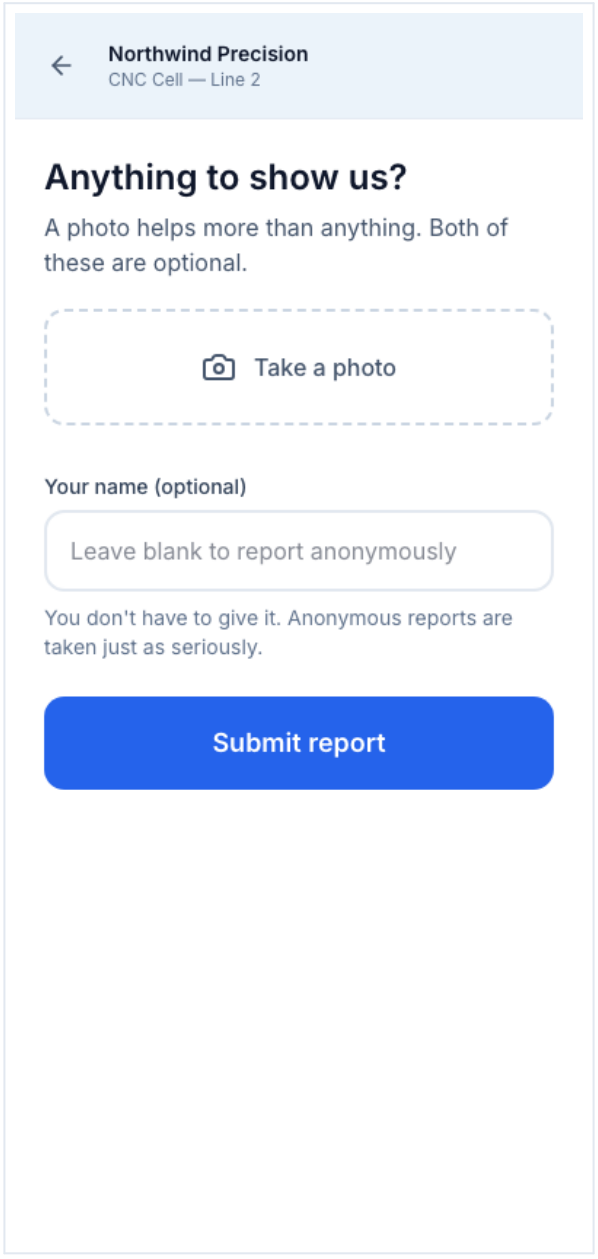
- *Something doesn't meet spec* — a part, batch, or material out of tolerance
- *Someone got hurt* — an injury, illness, or unsafe condition

- *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."*



Step 1: the five-choice type picker



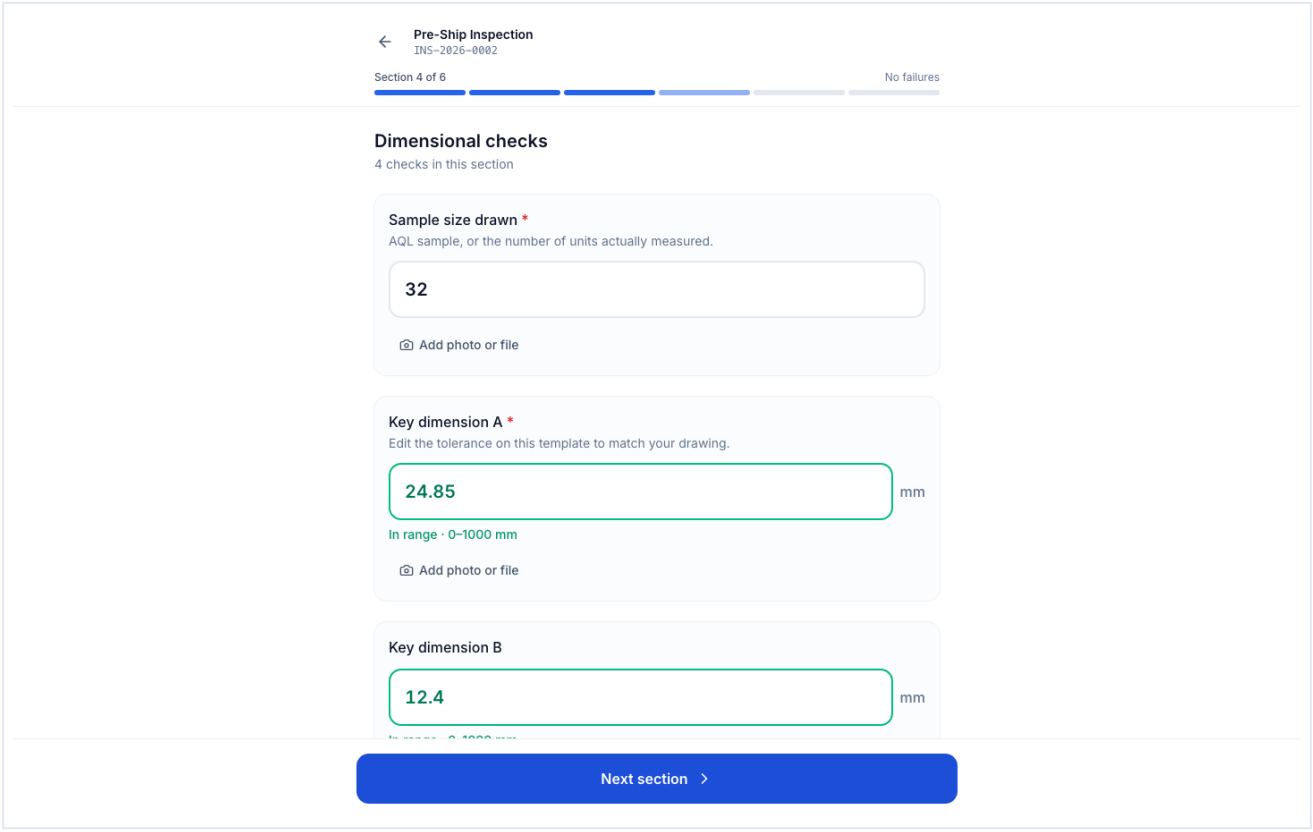
Step 3: photos and submit

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.

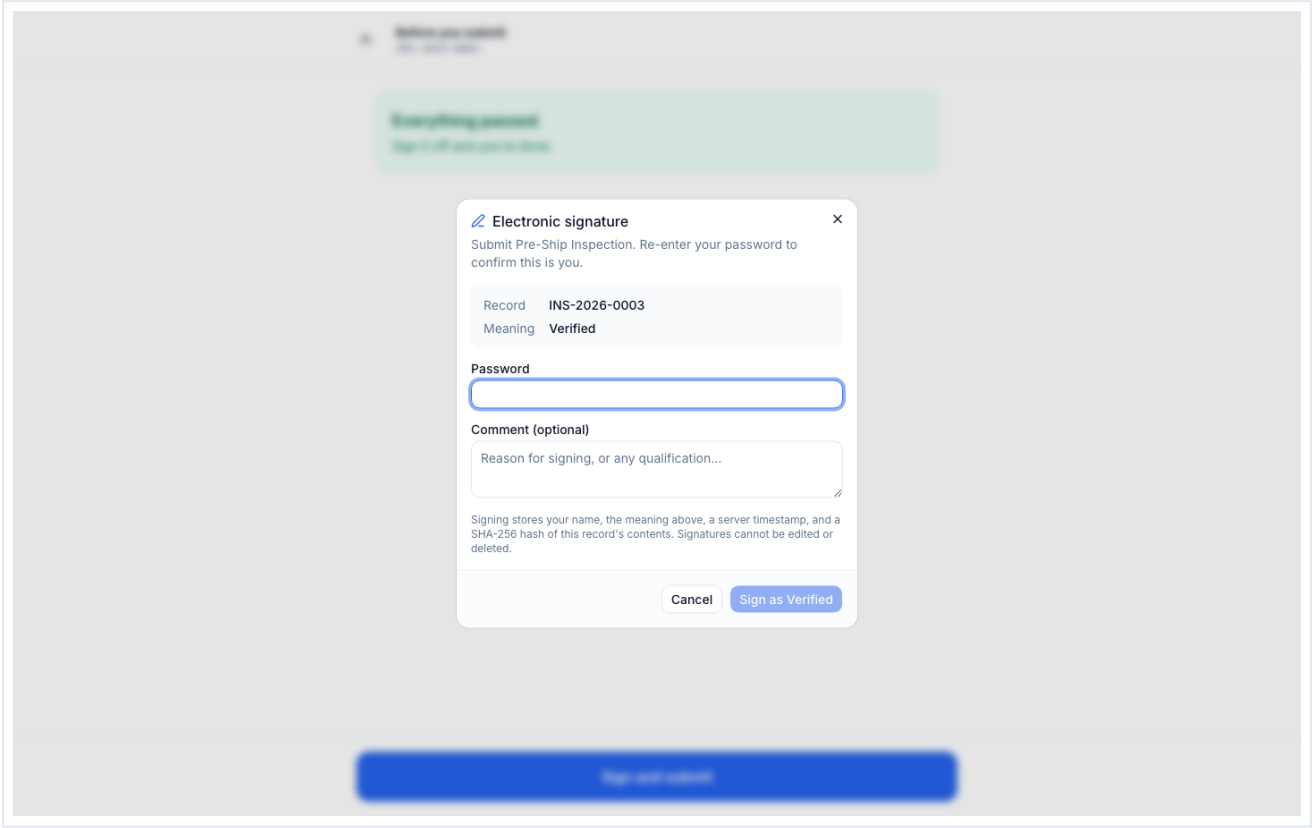
C4. Running an inspection

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.



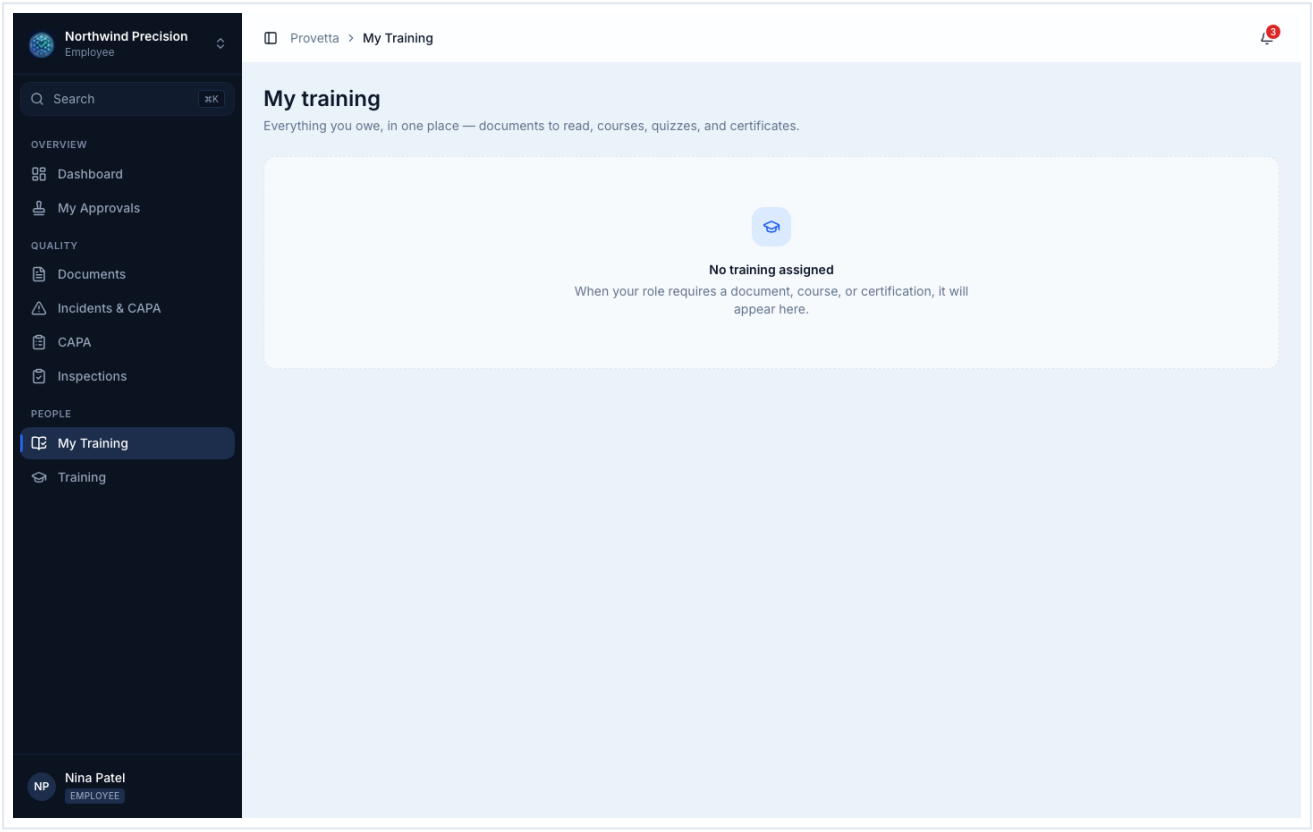
Runner mid-section, photo answer filled



Signature dialog on submit

C5. Your training

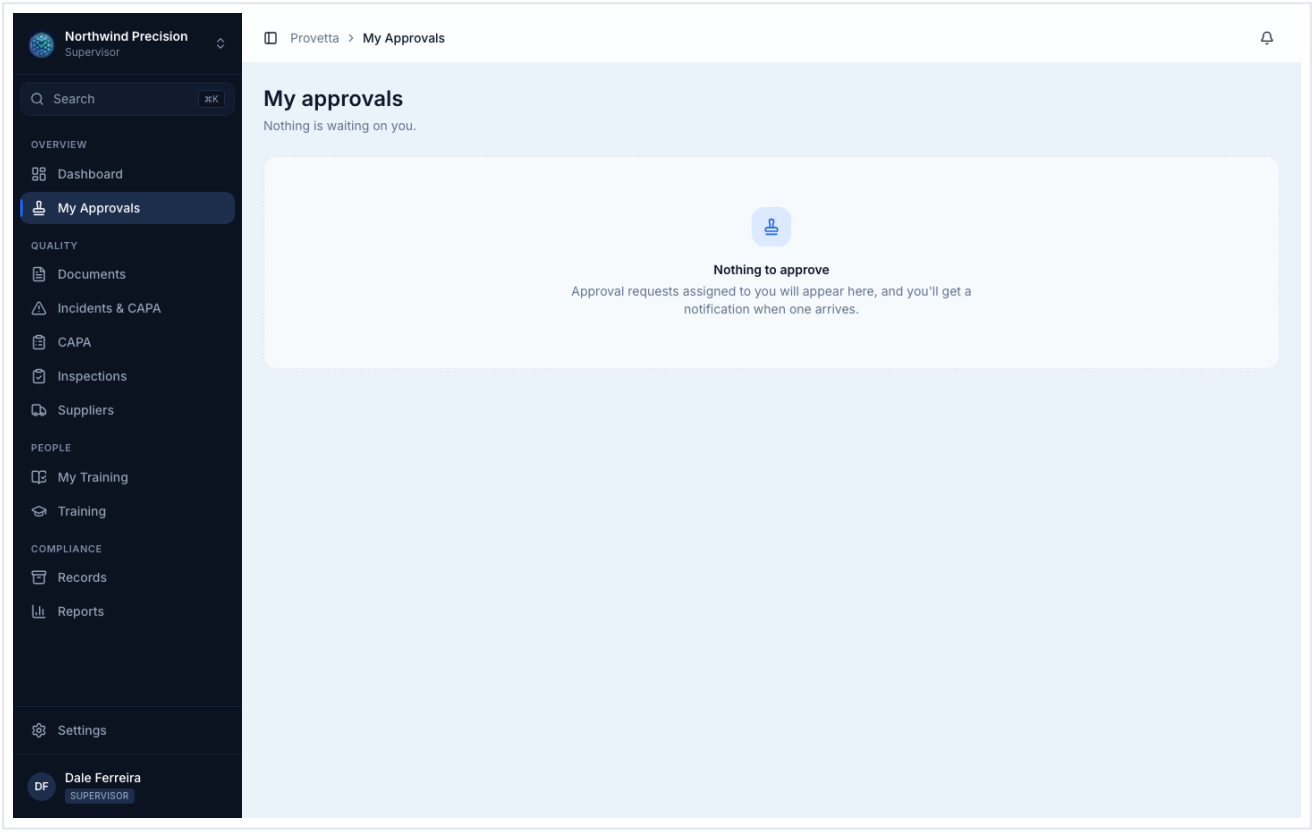
In the sidebar under PEOPLE, **My Training** — note it's a separate item from **Training**, which is the manager's view.



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:

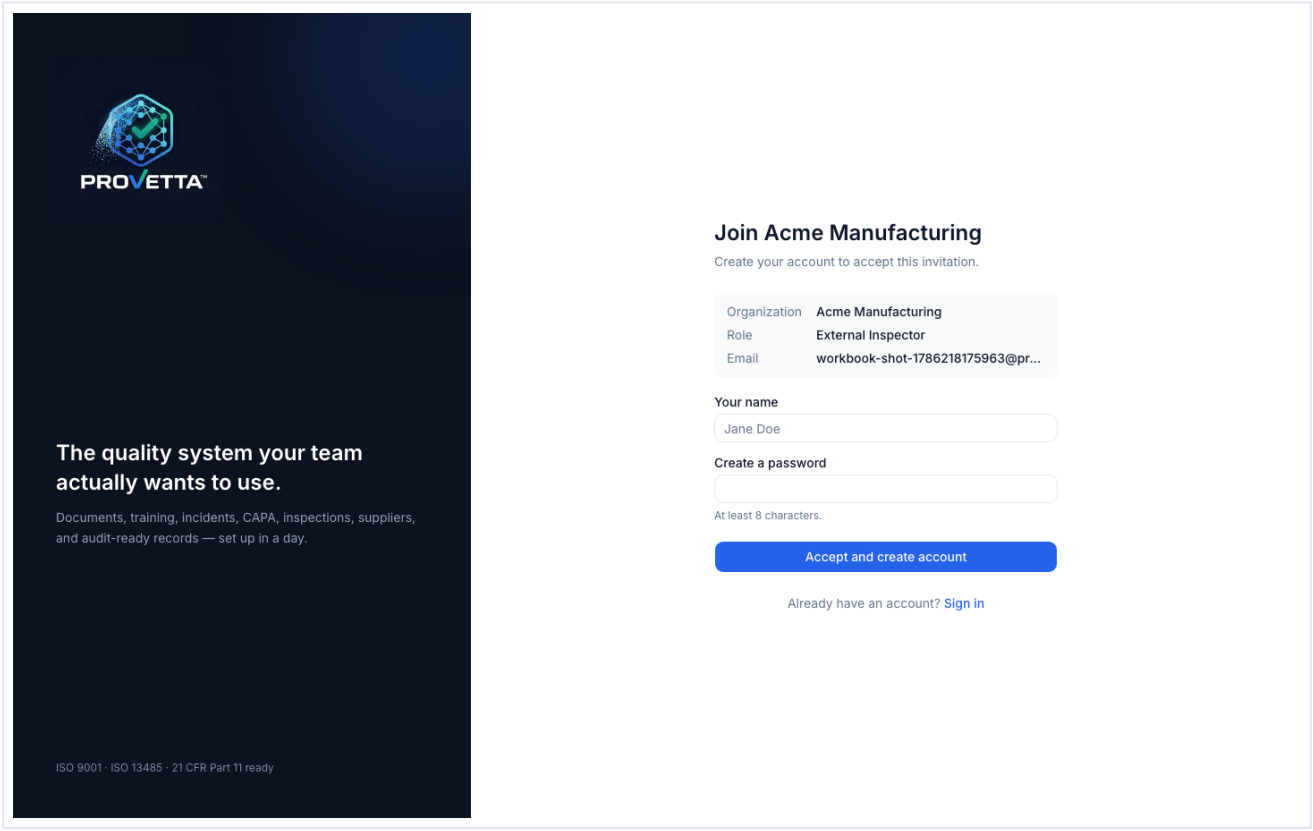
- Open the thing before approving it. The record view shows you exactly what was submitted; your approval signs *that*, not the summary row.
- If it's wrong, reject it with a reason. A rejection with a reason is a normal, healthy record — a rubber stamp is the thing audits are designed to catch.

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.

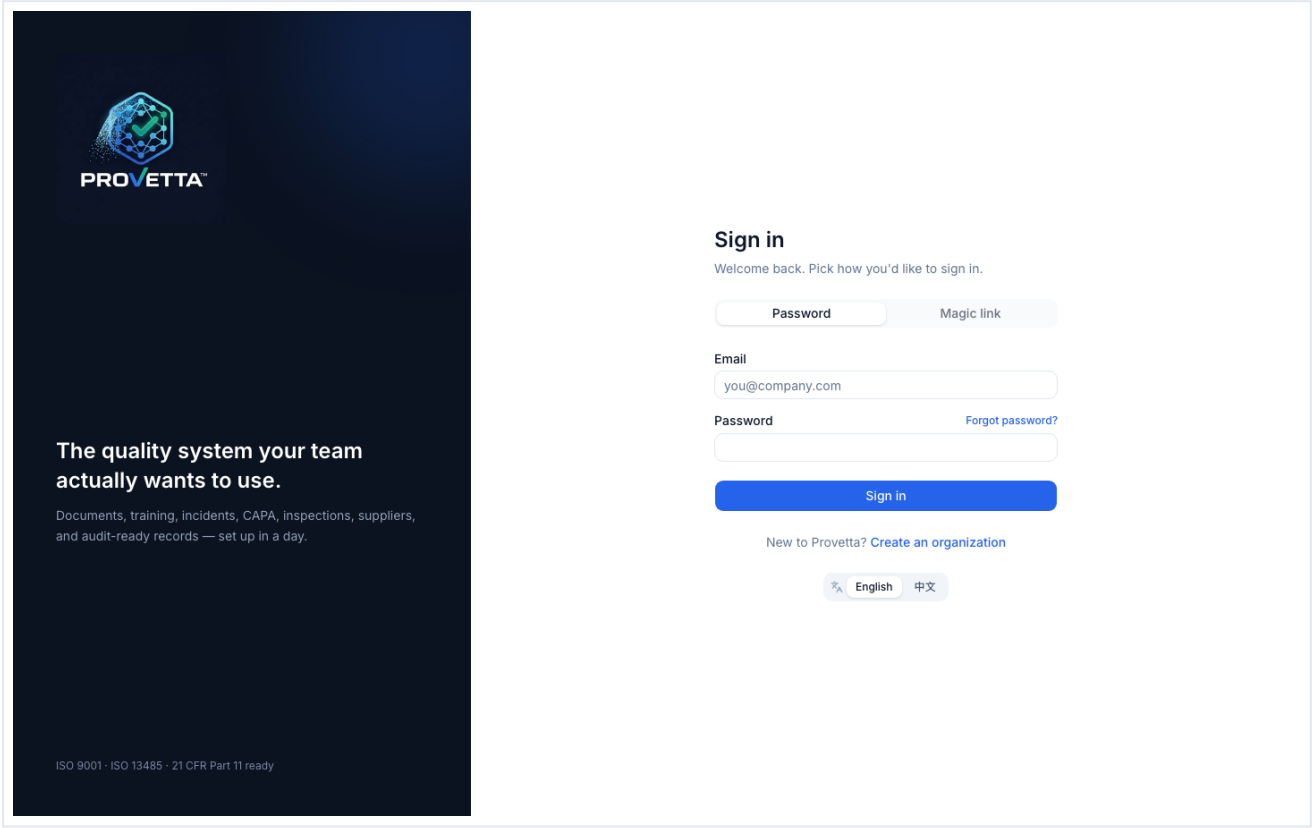
D1. Accepting your invitation

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.



Invite acceptance screen

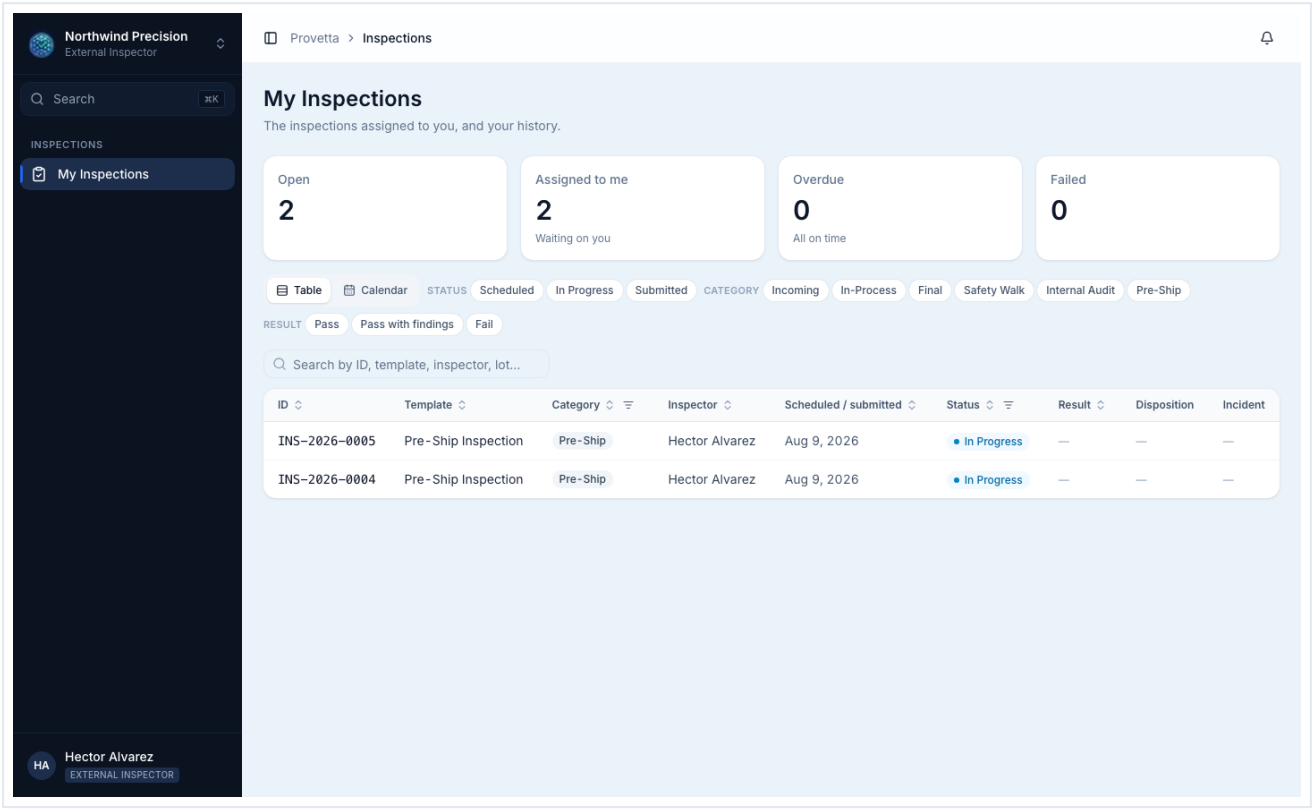
D2. Signing in and choosing your language



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



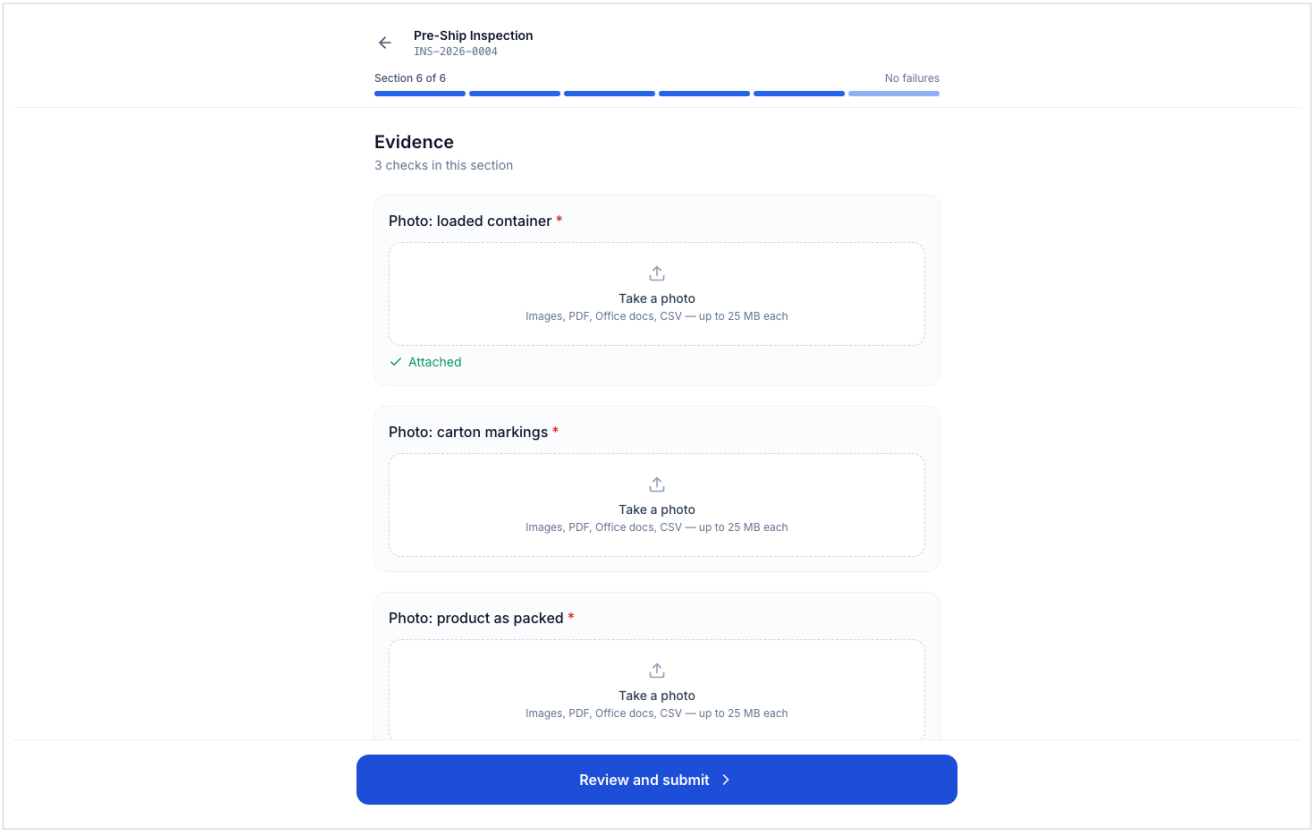
Inspector's list: only assigned inspections

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.

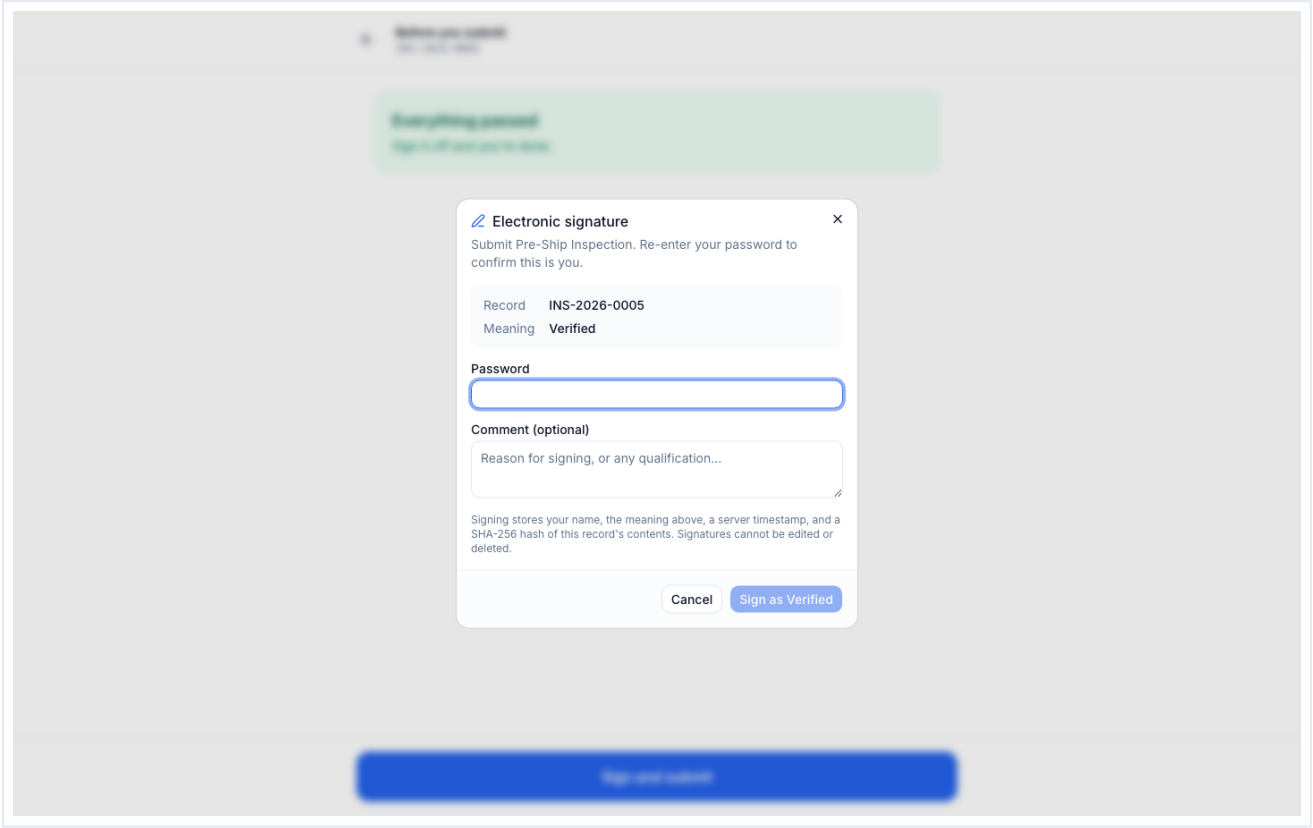


PSI runner, photo checkpoint

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.

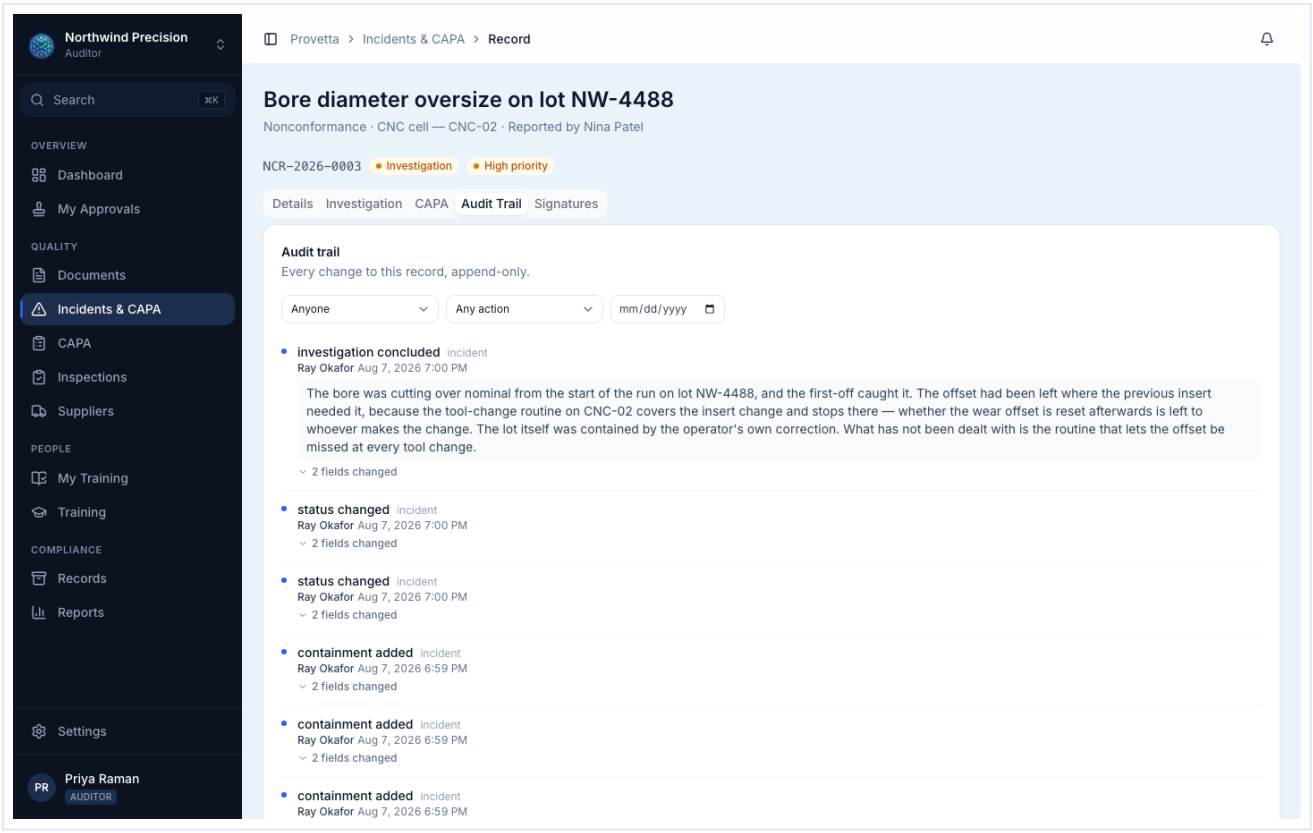
Track E — The Auditor's Workbook

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



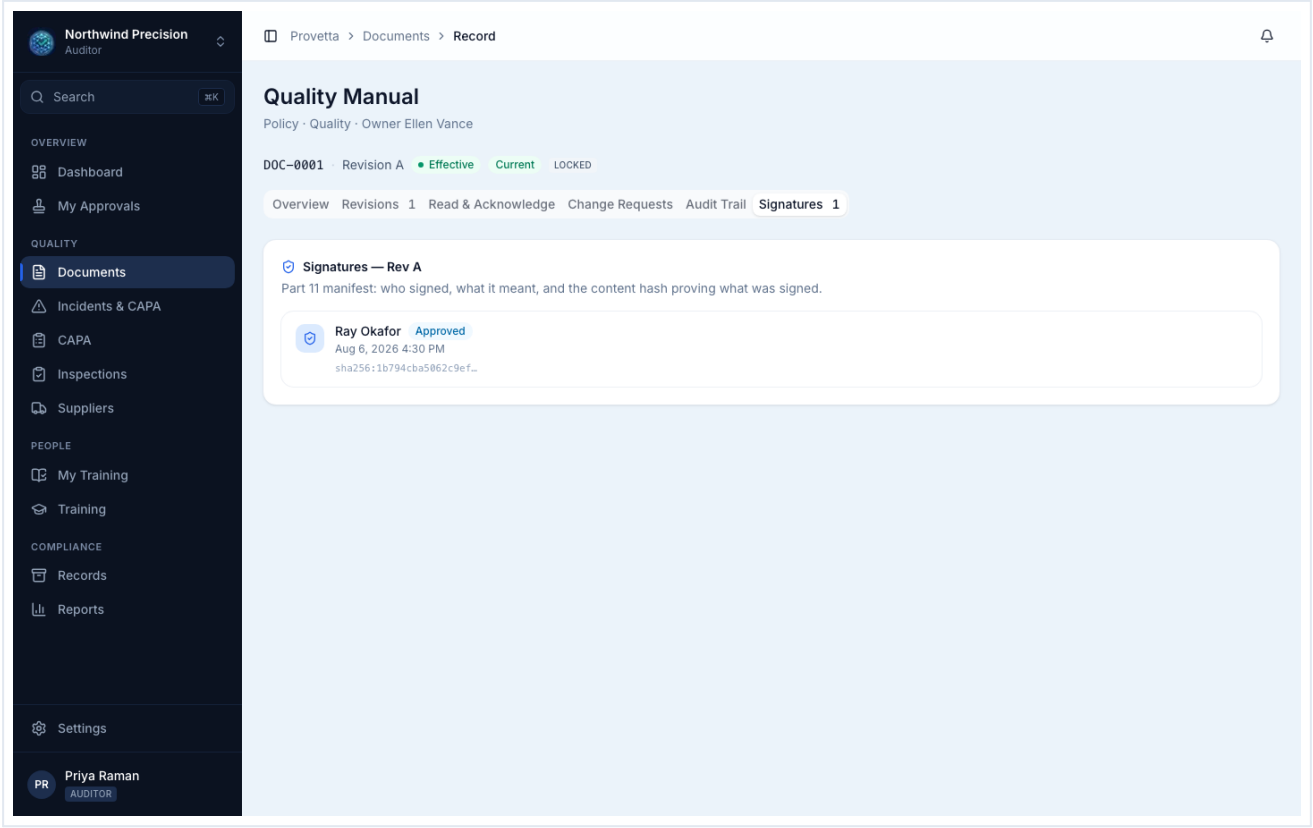
Audit Trail tab open

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.

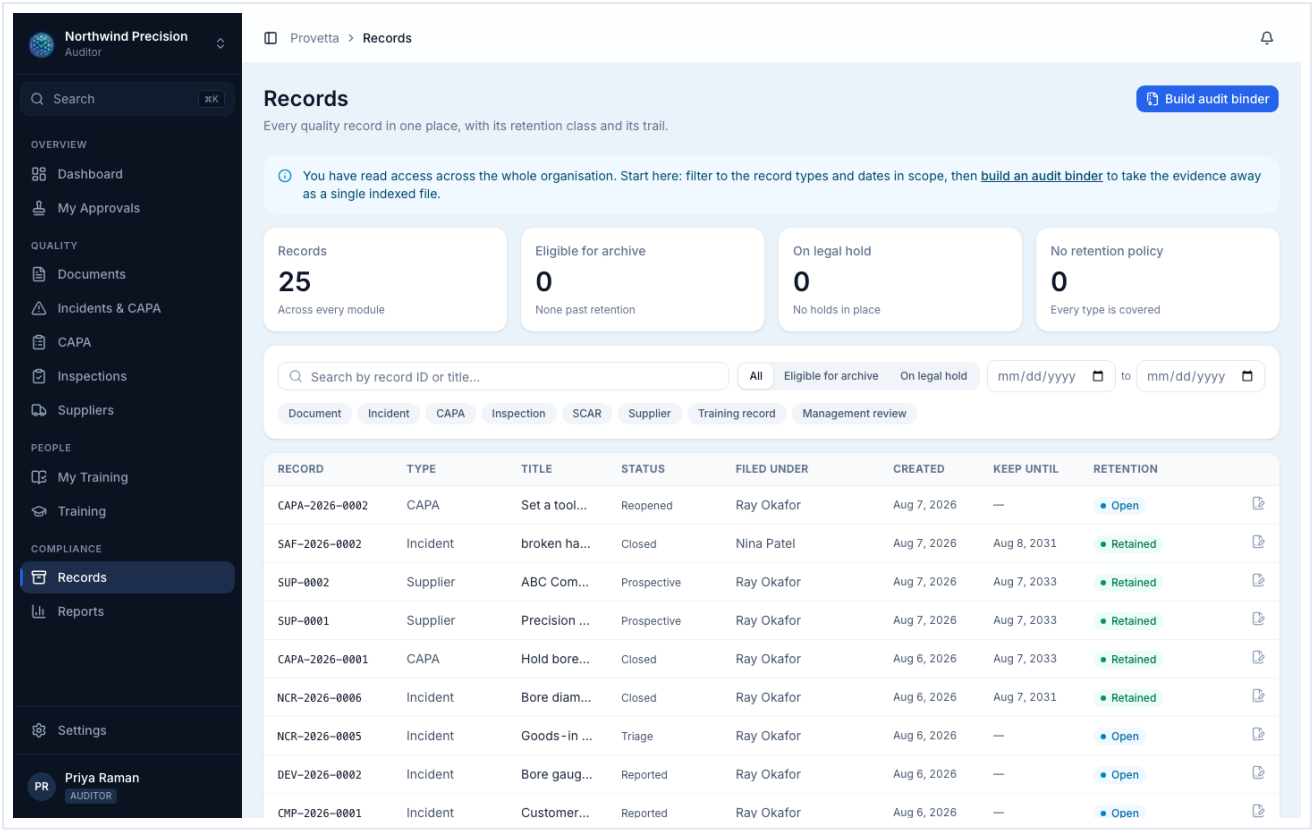
E3. Verifying signatures



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.

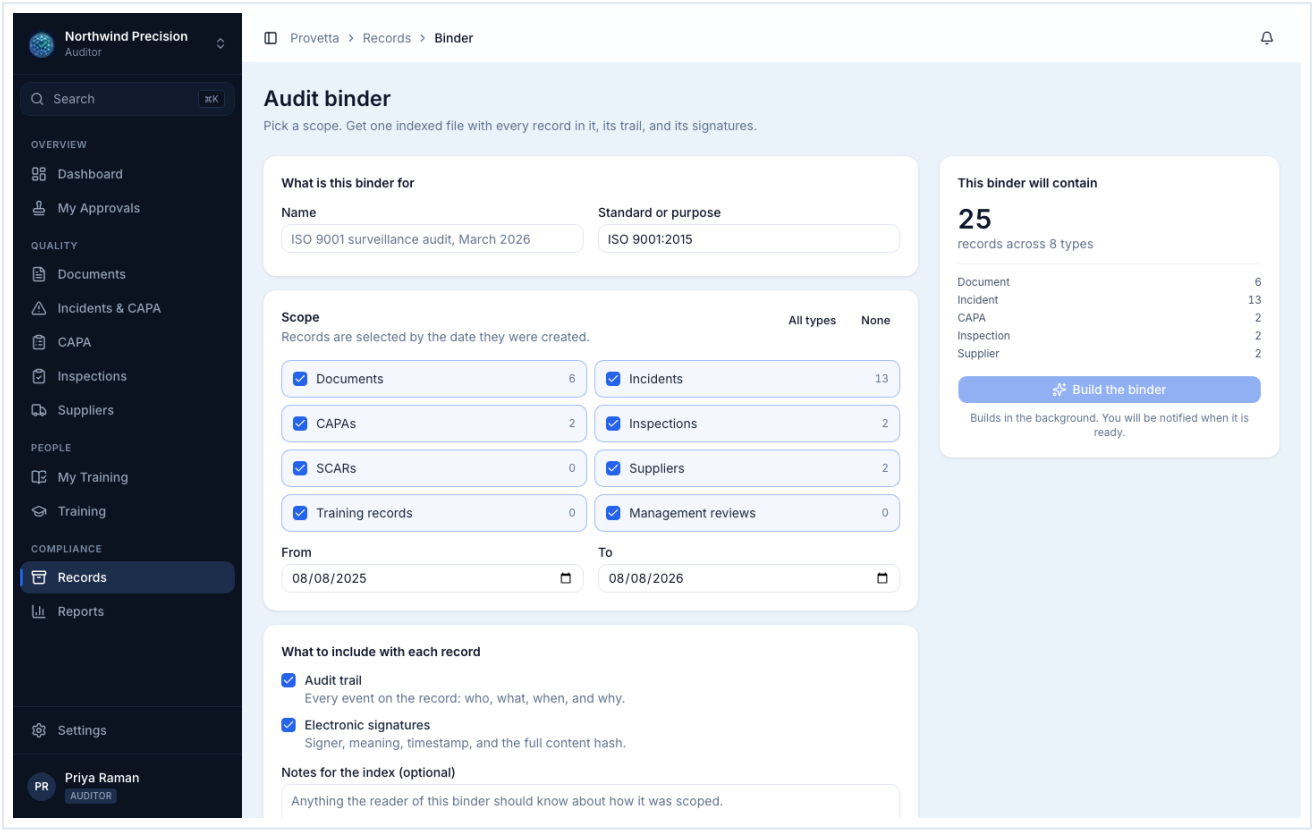
E4. The records registry and retention



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



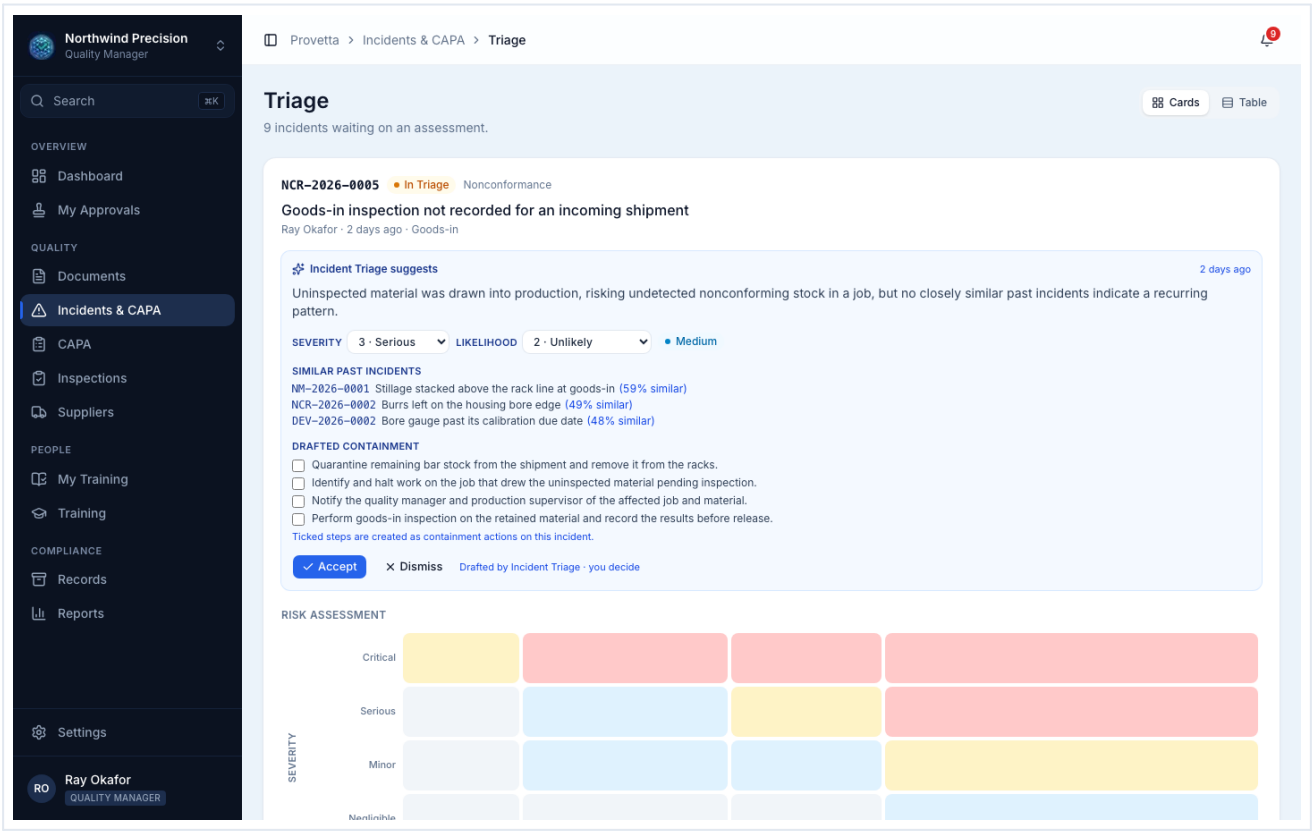
Binder with manifest

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.

Appendix 1 — Working with AI suggestions (all roles)



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.

provetta.ai