
CARA Tool

User manual

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1 Foreword

The Cara Reporting Tool is intended to support the IATF audit process.

The Analysis Tool leads the user step-by-step through the entire process. The tool supports

- Stage 1 readiness review
- Audit report with Nonconformity management
- Remote audit report with Nonconformity management
- Special Audit Report with Nonconformity management

The following processes can be carried out with the help of the tool:

- Creation of reports
- Creation of Nonconformity reports
- Completing of Nonconformity reports by organizations in NC CARA
- Checking of Nonconformity reports

Besides providing an introduction to the tool, this handbook also provides information on saving and loading data. This handbook gives only a quick overview on the capabilities of the CARA tool. Detailed description and answered questions about the tool will be answered in the provided wiki which also contains the information of the manual. Additional help will be provided where required in the service desk.

2 Description and installation of the tool

The tool is a web-based software, a web browser is therefore required to use this product. However, just because a browser is used, this does not mean that there is also a permanent internet connection required and that data is being exchanged with a server. The browser runs the program locally and saves the data entered directly in its cache. The data is therefore stored in the browser and cannot be opened from within another browser even on the same device. If you have used Firefox for the tool before and have the tool open in Chrome, you will not have access to your data in the Firefox cache. First it is necessary to exchange this data via a save all reports/backup and load reports.

The tool is available as online version with offline capabilities (the tool will be saved to the browsers cache similar to the data you enter). The programme only communicates with a server when validating the ADP-number/license and checking for updates. There is no other logging, communication or analysis of your data.

Your ADP-number/license is sent to the server during validation and if the licence is correct, the first name, last name and the sponsors of the auditor are sent back.

2.1 Report/Nc management files

All documents and files created in the tool are available for download via the download function in your browser using the save/export or backup/save all reports button. Depending on your default settings, you will be asked whether you would like to save or run a file (Please do not open the file with a standard application of your device, because this will only show you the raw data). In most browsers all downloads are saved by default in the browser's download folder. Reports are provided as PDF files which can be opened/saved and printed on your device. All files you save are provided in JSON/XML file format.

The tool uses the JSON or XML format to create report exports of any kind. The JSON/XML format is a structured text file which enables data to be filed away and then be loaded again. You can edit the files again using the tool. JSON is state of the art for data exchange in web applications. It can be equally structured as XML but has less overhead, because of the usage of brackets instead of closing tags in xml which results in smaller files. The file format data description can be found in the wiki.

2.2 Checking data retention settings/saving files

Before using the tool extensively, please check whether your browser deletes website chronic data on close or you have additional tools on your device which clean the browser cache. Cleaning the browser cache is not the default setting of browsers and was activated at some point by you or your IT. The CARA tool can still be used in this case. However, you must save reports every time prior to exiting the programme and then load them again to continue working on your report. Should you still wish to delete all browser data every time you save, we recommend that you use another browser which you could, for instance, use exclusively for the tool. If you clean your cache you will also always require an internet connection to start the tool because it won't be available offline.

An active report is automatically added to the report list whenever it is printed or saved as XML/JSON. When you create a new report or open another report, you will be asked whether the active report should be added to the report list. If you decline all data of that report will be dismissed. In edit mode you can change all data after opening the report. Please save the report locally for versioning purposes.

2.3 Offline availability and Updates

The tool is saved in the browsers cache on first start up. On the start page next to the software version the information "Tool offline available" will be shown. If the browser cache is not deleted it is now available offline and can be started by entering the web address (using the bookmark) even without an internet connection. After loading it checks and downloads the newest version for next start up. This means that you work on your offline available version every time you start CARA the internet connection is used for updating in the background.

Supported browsers

- Edge, Chrome, Firefox and Opera are fully supported but you must have the current version.
- Internet Explorer from Version 11 is supported in the but should not be used since this product works using old technologies and is not very fast.
- Apple's Safari is not supported. This browser does not follow general standards and does not support the generation of PDF files. It is not possible to print reports using this browser.
- Apple iOs devices can't create files within the browser so no data backup is possible. The usage is not recommended and officially supported.

3 Technical introduction


When using this tool, you will encounter the following functions:

- All reports list
- Backup/Save all reports
- Load Backup/all reports
- Edit report
- Export/Load report

- Import/Save report
- Delete report
- Reset browser database

3.1 All reports list/specific report type list

CARA offers a list with all reports which were created or loaded into CARA. The all report list will show all available reports from all report type groups. If you are in a specific report type group (Stage 1, Audit report, Remote audit report, Special report) a list for this group will be also available. These lists can be filtered to find a specific report. The available filters are the report name, organization name, audit type, cb certificate no and the audit start date. The text filter checks if the any part of the entered text is contained. The audit type filter is only available in lists where different types are possible. The filter can be reset using the trash icon.

Filter


Report name/no

Organization name

Audit type

v

CB certificate no.

Audit start date between
(also audits with no start date)

Using the report list you can open, save, copy a report and open/download it as pdf. You can access the nonconformity management report connected to the report. Every report will be represented in the header with its name and the certificate number if available. In the content part you'll find the organization name, the audit date, audit type and the unique id. The unique id is generated by the CARA Tool or provided by the IT of the CB when you import a report. The unique id is used to identify a report by the CARA Tool. Reports with the same report name will treated as different reports if they have different ids.

CARA offers also the possibility to inherit data from one report stage to another. For every stage different buttons for inheritance to the following stage or to a special report will be visible. Using these buttons it is possible to create a new report type and keeping data which is identic so you won't have to enter it twice. This functionality might be blocked depending on the CB, due to data consistency in processes for the CB.

Report name/no : Test

CB certificate no. :



Organization name : Make Parts

Audit date: 01.Feb.2020 - 22.Feb.2020

Audit type: Stage 2

Unique report ID: d69ac572-8891-441f-b1f3-bad7338e3c7d



↓ (JSON)

↓ (Xml)

Inherit to 1st Surveillance audit

Inherit to special audit

The trash icon in the top right of the report will remove the report from the browsers database (cache) please use this function if you have saved reports locally or don't need them anymore. The pencil icon will open the report in edit mode depending on your right fields will be editable. The benchmark icon next to the pencil will open the nonconformity report connected to the report. The printer will save/open the report in pdf format. The download symbol is used for saving reports on our provided formats. The brackets show the format the data will be saved in. We recommend in general the Json format if not otherwise required by your CB. The symbol with the two sheets enables you to copy the report. Apart from the unique id all data will be copied.

3.2 Backup/Save all reports

As soon as you have entered your first set of data, you should secure this data using the backup/save all reports function. You can find this functionality in two places of the tool. The easy access version is the icon on the start page and called "Backup/Save all reports" in the bottom right corner. This file contains all data that was saved in the CARA Tool including settings.

The other possibility can be found in when you click on the "Settings->Backup & Database" menu. Then click on the "Backup" button. In all cases a pop-up window opens in which you confirm your decision to "save file" by pressing the OK button or a file is downloaded to your downloads folder automatically. Every time you create a new backup, a new backup file with the name "Cara-Tool-Backup" is generated. Please do not open it this is not required. If you accidentally open it in the editor you can save and close it.

Create a backup on close after x days automatically (0 or Empty = Everytime)

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In addition to the manual backup/save all reports function, the tool also has an automatic backup feature which can be set to create a backup after a specific amount of days. This backup is conducted automatically when the tool is first launched. After this the interval until the next backup can be selected under settings, the default setting is 14 days. The setting can be found in "Settings->Backup & Database"

The backup is only executed when the tool is started and the duration since the last backup has passed the amount of days set in the settings. If you change the setting to 0, a backup will be carried out every time a change is made to the browser website. The maximum value that can be entered is 365 days. **On exiting the browser you will be warned that not all data has been saved. After clicking cancel the backup is created automatically and you can exit the tool.**


You will know that a backup is being generated when a "Cara-Tool-Backup" file is downloaded. Please save this file in a secure place.

3.3 Restoring data/loading data from backup

In general, it will not be necessary to load the full report data file/backup because the stored data will be available on start-up. This could be the case though if, for instance, you


- carry out a browser update
- your browsers chronic was deleted
- you want to change your device
- migrate data between devices

Backup files can be also loaded from to places in the tool. The direct access function is available on



the start page using “Load Report/Backup”  will load the backup by replacing all existing data. Please make sure you are using the latest version of your backup and do not overwrite new reports. The same functionality can be found in “Settings->Backup & Database” using the “Import backup” button

Once you select the import/load backup, a file selection window will open. You first select where the backup is stored - often the download folder - and then select the desired file to be imported.


3.4 Creating a new report

The CARA tool keeps the last report you worked on in the active report storage. This report is accessed when you choose the audit type group in the left main menu. The report will be opened on the audit data page. There you will find the new button in the top right corner. The other option is to use the new button on the start page of the tool . If the active report was not saved yet in the report list which happens automatically when you create the pdf or save the report as json or xml file you will be asked if you want to add the active report now.

3.5 Editing existing reports

On the “Start” page, you can access all existing reports for every report type group using the list button . You can also access the active report using the edit/pencil button  the header line above the button contains the report name, the organisation and the audit date of the active report.

3.6 Exporting/Saving reports

To save an individual report you can access that functionality on the start page for active reports using the default json format . For all reports you can do this with the functionality in the report list

3.7 Importing reports

The “import report” function enables you to upload previously saved and exported reports back into the tool for further editing. First select the folder and then select the desired *.json file. The tool automatically identifies a report based on its data structure and inserts it into the correct storage place. The tool also recognises whether the file is a backup and loads this backup if you confirm this in the pop-up window.

Every report is assigned a unique ID (unique identification number) when it is imported. The tool verifies whether this ID already exists and asks the user again whether he/she really wishes to overwrite an existing report.

3.8 Deleting reports

You can also delete individual reports under “start” and the “all reports” +”report type” menu item. Select the report with the desired report number and click on the “delete report” function. Please be aware that deleting the report means that it is only possible to re-import the report for further editing if you have previously exported the report.

3.9 Copying reports

It is also possible to copy a report. The tool automatically removes values that will be changed. First, the first auditor is set as the user of the tool. Then the data fields report number, report date and audit date are cleared. If an audit is repeated, you can view and correct previous results.

3.10 Resetting the database

The “reset database” function deletes all active data from the tool. This includes all current settings and previous entries in the various fields. All previously exported reports and the completed backup are unaffected by this function and are still available after a reset.

After resetting the database, individual reports can be re-imported. The backup can also be re-imported.

4 Settings

Under “Settings” you can enter your ADP number and other default settings. In addition to these options you can import backups under “Settings” and fully delete the database.

4.1 Language

The language of the tool is chosen based on the language of the browser but can be changed at any point. Changing the language at this stage also changes the language of the questions and all terms supplied in the tool and report printout. Textual inputs are not affected.

The tool is delivered with all languages and can display these in the browser. However, fonts for the report printout must be included in the delivery.

5 Questions, answers and updates

5.1 Patches und Updates

The tool is being continually improved. Patches are provided automatically on every start of the application. Due to the offline availability of the tool this update is not loaded directly but on the next start up. The tool is downward compatible to old data structures. If changes to the data structure occur old reports can still be opened with the new version. They will be automatically transformed into the updated data structure. This will happen for data in the browser cache and for data loaded from old json and xml files.

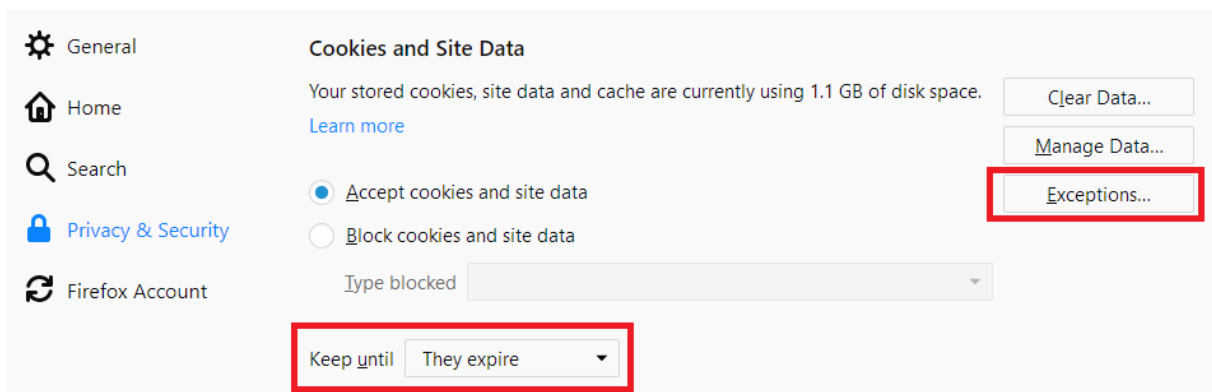
5.2 Deactivating the delete browser history function

To use the tool as intended, browser data should not be deleted every time the tool is closed. This also affects the part of the browser with the databases in which the Cara Reporting Tool data are stored. This will also remove the tool from the browser which makes it offline unavailable.

5.2.1 Firefox

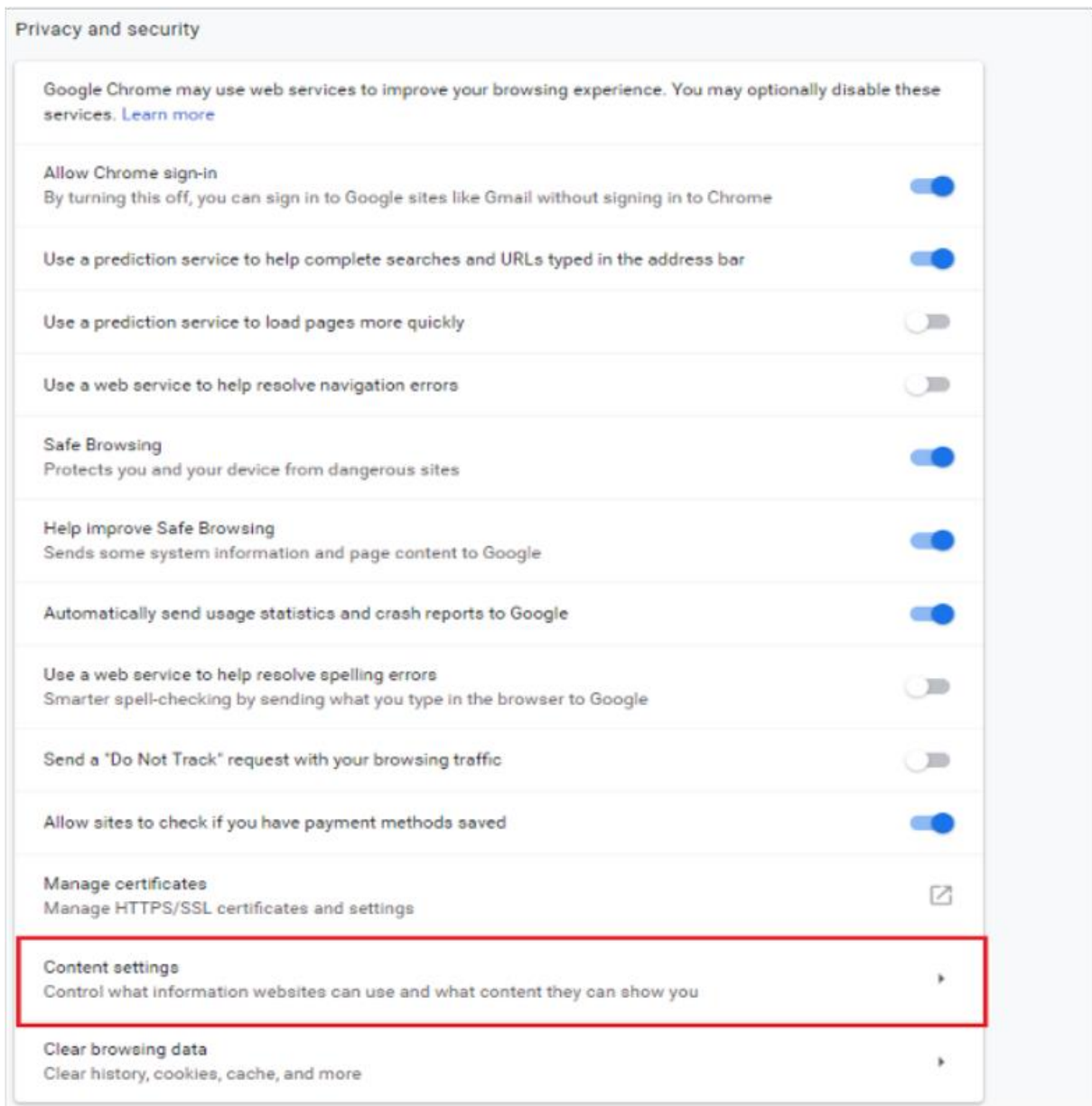
You will find this function in “Options” in Firefox, then in “Privacy & Security” in the menu on the left.

In Firefox you have the possibility to choose to use this function in general or just for the Cara Reporting Tool. Under the sub-item “Cookies and Site Data”, you can set an exception by entering the address of the tool. For the online version this address is <https://cara.iatfglobaloversight.org>. For the offline version, no exception can be made. Alternatively, you can also change the “Keep until” function to “they expire”.

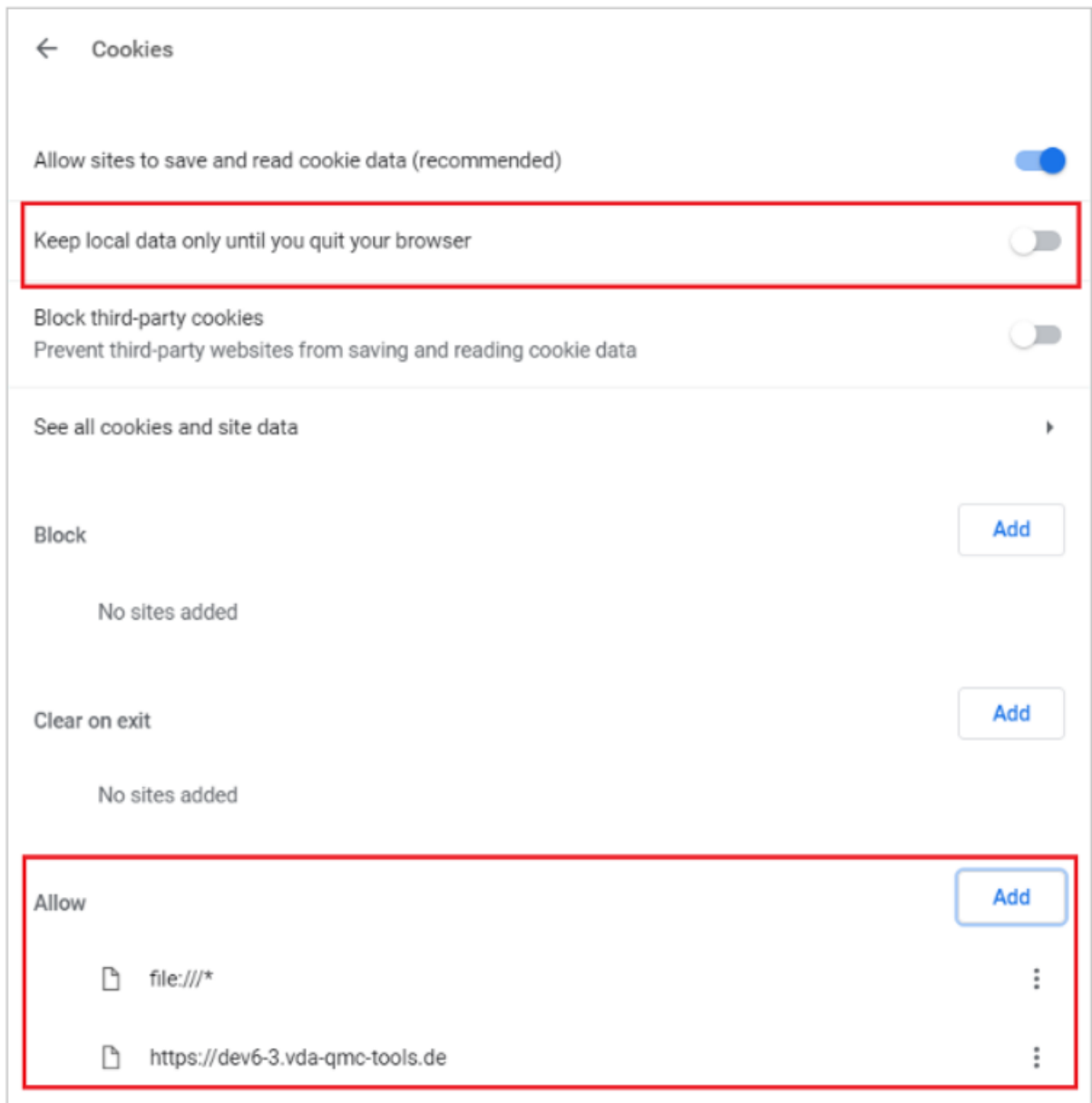


5.2.2 Chrome

You will find this function after opening the other points under Settings in Chrome by clicking on “Advanced” at the bottom of the page. In “Privacy and security”, you will find “Content Settings” at the bottom. In this menu you will find the item “Cookies”.



After the Cookies sub-menu opens, you can deactivate the function “Keep data until you quit your browser”. From this point forward, data can be stored in the long term in the browser. It is also possible to create an exception for the online version by entering the URL “https://cara.iatfglobaloversight.org” and for the offline version “file:///”



5.2.3 Edge

You will find this function in Edge in Settings, then the “Select elements to be deleted” in the “Delete Browser Data” menu item. The function “Keep local data only until you quit your browser” must be switched to “off”.

