Improvement Reviews

Training and operating manual

Starter • Intermediate • Advanced

Software baseline 1.14.0 • Documentation edition D1 • 20 November 2026

Learn the workflow, practise the decision and keep the evidence connected. This manual supports self-paced study and facilitated company training.

Commercial access remains quotation based, through named company accounts and allocated annual software seats. Academy enrolment is arranged separately within the agreed training package.

All examples are fictional. Screenshots show empty forms or a labelled training record; no customer evidence is included.

How to use this manual

Begin with the operating reference, then study the three levels in order or use equivalent prior knowledge. Each level contains three lessons, a practical task in each lesson and ten knowledge-check questions. Answers and explanations follow the questions. Allow 15–25 minutes per lesson; pause between sections.

Write exercise answers in a notebook or an authorised training workspace. Do not put real personal or company evidence into an Academy exercise. The public demonstration is read only. A training certificate records completion; it is not a substitute for observed competence or workplace authorisation.

The current Feature & Readiness Register is the authority for delivered capabilities and remaining acceptance work. Historical release notes and old screenshots describe their own editions.

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Access and responsibilities

Confirm company, named account, allocated seat, module entitlement and role. These are separate controls. Company managers maintain the quality registers. Assign a responsible owner and a different reviewing manager. Personnel entries do not create login accounts. Where a control is unavailable, check scope and role before treating it as a fault.

Audit or Assure provides audit, document, objective, management and improvement registers. NCR provides quality cases. Contractor provides supplier reviews. No extra Improvement Review entitlement is required.

Operating reference

Start here: company, role and records

1. Sign in through Client sign in. Select the intended company before opening records. Company membership, an allocated named seat, product entitlement and the appropriate role are separate requirements.

2. Open Quality & Audit for company-wide registers. An assessment selection is not required to start a register. Use Open assessment workspace for detailed audits, NCRs, investigations and actions.

3. Company managers maintain the quality registers. Assign a responsible manager and a different reviewing manager. The reviewer must also be distinct from the creator and submitter when completing review.

4. Audit or Assure enables audit programmes, standards/evidence, controlled documents, objectives and management reviews. NCR enables quality cases; Contractor enables supplier reviews. The quotation must reflect existing Assure entitlement rather than require duplicate Audit purchasing.

5. Use named staff and contractor accounts for assignments and submissions. A personnel entry in the competence register is not a login account and does not itself allocate a seat.

If a control is unavailable: check company, membership, role, licence and module allocation. A public demonstration cannot edit private company registers. Existing records may remain readable when editing is unavailable.

What changed after we fixed it?

Open Quality & Audit → What changed after we fixed it? → Add record. Save a Draft with the problem and review due date. Select the accessible assessment, source type, source record and corrective action linked to that source.

Record the implemented change and date, metric and success criteria. Add baseline and follow-up periods, affected items and total items checked. Counts must be whole, with a positive denominator. Record comparable conditions and limitations; do not infer causation from a lower percentage.

Save Draft before Files. Record the recurrence check and evidence, outcome, next action and next review date. The assigned owner submits Awaiting review. A different assigned manager records the review note and marks Reviewed. Reopen to Draft with a reason before revising reviewed evidence.

Effective requires adequate evidence and no recurrence observed. Partly effective records an improvement that still misses the agreed result; Not effective records failure against the criteria. Inconclusive records insufficient evidence with a plan to resolve it. A review does not automatically close its source or action.

The screenshot shows a saved fictional Draft on the 1.14.0 staging installation: 8/40 before and 0/60 after. It is Not assessed and recurrence is Not checked; the percentage alone does not establish effectiveness.

Evidence files, exports and history

Save a record before opening Files. Supported formats include JPG, PNG, GIF, WebP, PDF, Word and Apple Pages. Export Google Docs to PDF/Word and HEIC images to JPG before upload.

Company-register limits are 5 MB per file, 100 files and 50 MB per record. Assessment attachment limits apply separately to assessment records. Downloads are permission-checked rather than public media URLs.

Upload the correct revision while the record is Draft. Submitted and approved evidence is protected by workflow rules. A file hash records integrity; it does not certify the truth of its contents. Sentinel does not virus-scan these uploads.

Use History to inspect retained revisions and download a historical JSON snapshot. The history window shows the latest 100 entries; do not describe this view as an unlimited audit-log export.

Export this register produces JSON for the displayed active or archived register selection. It is not a complete website backup. Keep the database, protected uploads, site configuration and application code together in the recovery plan.

Core investigation evidence-reference records describe and point to sources. They are distinct from the protected file attachments now available on supported operational and company records. Older reference-only illustrations must not be used to claim that the suite has no upload capability.

Performance and company email reminders

Open Performance & reminders. Assessment totals reflect the assessments the current user can access. Company register totals use active records. Review open NCRs, overdue actions, upcoming register dates, rework costs by currency and supplier decisions.

In-app reminders refresh when the dashboard opens. They are separate from scheduled email. The scheduler timestamp is an operational clue, not proof that every recipient received a message.

Company managers use Email reminders to opt in, set notice days and escalation delay, and select managers for escalations and submitted evidence. Review recipients before saving. This documentation update does not enable reminders.

The administrator connects the existing mailbox through Sentinel Suite → Email connection. The sender is sentinel@safetyman.net. Nigel confirmed receipt of the connection-test email on 20 November 2026; no password is included in these documents.

Email contains a generic reminder, portal link and reference rather than record titles or attachments. Permission, membership, entitlement, licence and record state are rechecked before sending.

Queue meanings: Accepted means handed to transport, not confirmed inbox delivery. Failed attempts use bounded retries. Unknown indicates an interrupted attempt; investigate before retrying. Still outstanding: a scheduled company reminder and escalation delivery exercise.

Supplier performance and management review

Supplier performance: use a consistent supplier reference across engagements. Record the period, evidence, evaluation and a decision. A terminal review cannot remain Pending. The dashboard groups exact references; differing spellings can split the same supplier.

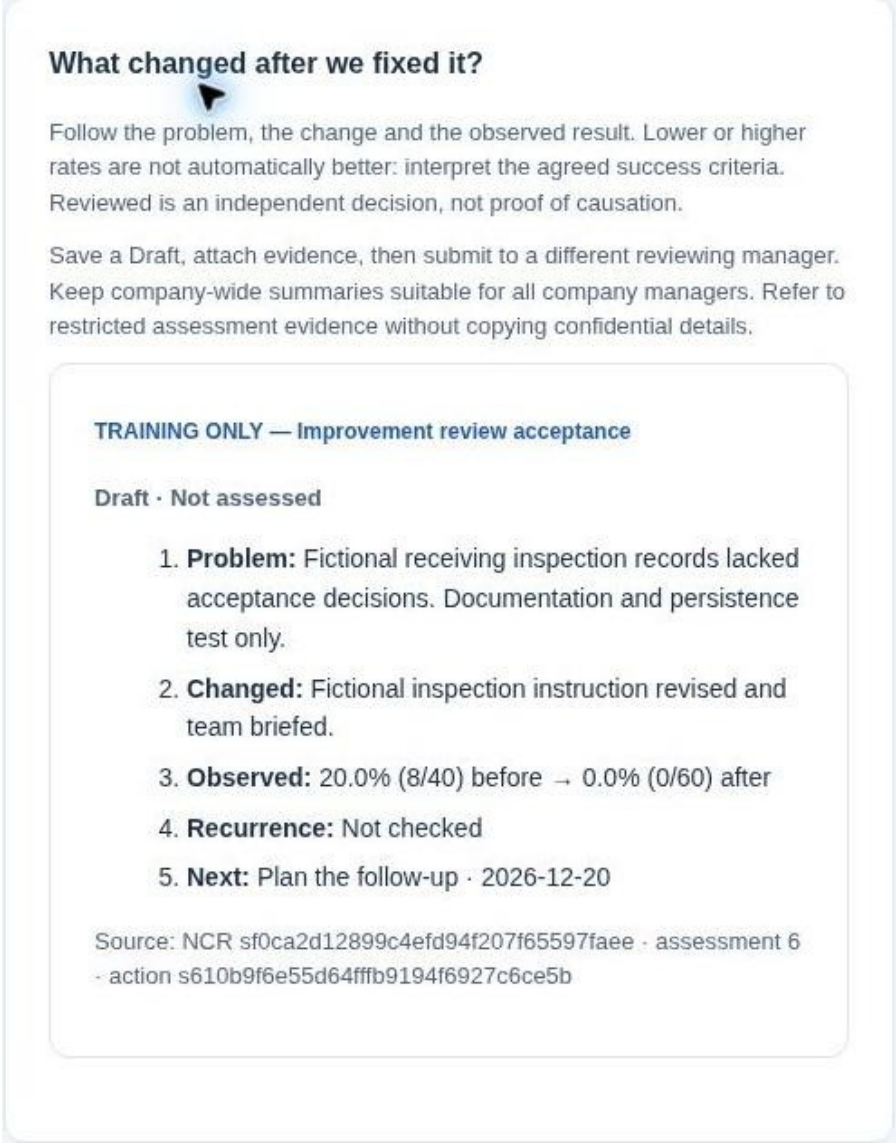
A reviewed decision such as Improvement required or Suspend new work is a performance record. It does not automatically suspend a contractor or cancel permission to work. Make and record any operational access decision through the appropriate contractor process.

Quality objectives: define the intended result, measure, target, owner and review date. Record the evidence behind progress and review the outcome rather than simply changing a status.

Management reviews: bring together audit results, quality cases, supplier evidence, objectives and actions. Record inputs, decisions, responsibility and follow-up. Review outputs should be traceable to work and later effectiveness checks.

Meeting discipline: agree what changed, whether it worked, which findings repeated and what resources are needed. Record unknowns explicitly. The existing dashboard is current-state reporting, not a forecast or a certification score.

Workflow screenshot



Fictional saved Draft on staging, version 1.14.0, 20 November 2026. The result is still Not assessed; recurrence is Not checked.

Starter

Record what changed and distinguish action completion from an observed improvement.

Prerequisite: No prior Sentinel experience is required. Understand your organisation’s authority and evidence-handling rules.

1. Ask a better closure question

Understand the decision

“Has the action been completed?” checks delivery. “What changed after we fixed it?” checks the result. An action may be completed perfectly and still fail to address the mechanism. Start by defining the problem, intended change and success criterion. Do this before seeing follow-up results.

Apply it in Sentinel

Open Quality & Audit → What changed after we fixed it? → Add record. Enter the title, problem and review due date, then save Draft. Select the linked assessment, source type and source record. Choose the corrective action linked to that source. The controls show accessible records; an unavailable source must be resolved through permissions or the correct assessment.

Practical task

The action says “brief staff”. Write an outcome question for missing inspection decisions.

Worked answer

After the revised instruction and briefing, are acceptance decisions recorded before release in the defined sample of receipts? State the period, sample, target and evidence. Attendance alone does not answer that question.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

2. Record the before and after honestly

Understand the decision

Counts need denominators. Eight affected records in forty checked is 20%. Zero in sixty is 0% in that observed sample. It does not prove the problem can never recur. The module measures affected items divided by total items checked; use consistent definitions and do not treat it as a general financial or sensor calculator.

Apply it in Sentinel

Record the baseline period and affected/checked counts, implementation date, follow-up period and affected/checked counts. Whole counts are required; the checked total must be positive and the affected count cannot exceed it. Observed periods cannot be future dates. Save the Draft and attach the supporting sample evidence.

Practical task

Enter a teaching example: baseline 8/40, follow-up 0/60. What should the summary say?

Worked answer

Observed affected-record rate: 20% before and 0% after in the stated samples. Record what was checked, the comparable conditions and limitations. Do not claim zero future risk or a proven causal effect.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

3. Choose the next step, not just a colour

Understand the decision

A result needs interpretation against the agreed criterion, a recurrence check and a next step. Effective, Partly effective, Not effective and Inconclusive are review outcomes. Inconclusive is useful when evidence is missing or not comparable; it is not the same as failure.

Apply it in Sentinel

Record the change, document/training references, metric, success criteria, comparability, evidence and recurrence check. Assign a responsible manager and different reviewer. The owner submits Awaiting review; the independent reviewer records the decision and Reviewed stage. Keep a next action and review date. The review does not automatically close its source or action.

Practical task

A briefing occurred but there is no reliable baseline or follow-up sample. Which outcome fits?

Worked answer

Inconclusive, with the evidence gap and a specific measurement plan. Do not fabricate a baseline or mark Effective because the activity happened. A reviewer can document the uncertainty and next review.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

Starter knowledge check

Choose one answer per question. Each is worth one point; seven correct answers meet the 70% course threshold. Try all ten before reading the answer key.

1. What is the key distinction in an improvement review?

A. Completed action versus observed outcome.

B. Saved title versus company logo.

C. File size versus page count.

D. Password age versus due date.

2. Does the improvement review automatically close the linked action?

A. Yes, when a Draft is saved.

B. No.

C. Yes, whenever a percentage falls.

D. Yes, when a file is attached.

3. What does the percentage measure?

A. Predicted incident probability.

B. Training hours per person.

C. Affected items divided by total items checked.

D. Guaranteed financial return.

4. Who completes the independent review?

A. The creator using the same account.

B. An anonymous visitor.

C. The software without a decision.

D. A distinct assigned reviewing manager.

5. Eight affected items out of forty is what?

A. 20%.

B. 8%.

C. 40%.

D. 80%.

6. Zero affected items out of sixty establishes what?

A. Proof that training alone caused the change.

B. Zero observed in that sample.

C. Zero future risk.

D. Permanent defect elimination.

7. Which counts are valid?

A. 2 affected of 0 checked.

B. 1.5 affected of 40 checked.

C. 2 affected of 40 checked.

D. 41 affected of 40 checked.

8. A briefing happened but outcome evidence is missing. What fits?

A. Effective automatically.

B. Not effective automatically.

C. Reviewed with invented counts.

D. Inconclusive with a measurement plan.

9. When should success criteria be agreed?

A. Before judging follow-up results.

B. After choosing the most favourable sample.

C. Only after closure.

D. Only if a complaint arrives.

10. What is required alongside the result?

A. Only the training date.

B. A recurrence check and next step.

C. Only a green colour.

D. Only the action invoice.

Starter answer key

1. A — An action can be completed without solving the problem.

2. B — Source and action workflows remain separate.

3. C — The measure is a simple observed proportion with a defined denominator.

4. D — The workflow requires a separate review decision and traceable account.

5. A — 8 divided by 40 equals 0.2, or 20%.

6. B — A sample result has a defined scope and does not guarantee future performance.

7. C — Counts must be whole, the checked total positive and affected count no greater than checked.

8. D — Missing evidence should be stated and addressed, not fabricated.

9. A — Predefined criteria reduce retrospective goal-changing.

10. B — The review connects outcome evidence to continued control and follow-up.

Intermediate

Design comparable follow-up checks and review outcomes with traceable evidence.

Prerequisite: Complete the preceding level or demonstrate equivalent practical knowledge. Practise only in an authorised training workspace.

1. Design a comparison before collecting the answer

Understand the decision

A fair comparison uses a stable definition, relevant periods and a defensible selection method. If the baseline is night-shift work and follow-up covers only the day shift, explain why conditions differ. A new inspection method can change detection as well as actual defects. Keep these possible explanations visible.

Apply it in Sentinel

Use the metric and comparability fields to state the affected-item definition, population, sampling approach and exclusions. Enter baseline dates before or up to implementation; follow-up starts on or after implementation. Retain the raw counts and evidence references. Do not choose a favourable period after seeing several results.

Practical task

The baseline checked every delivery, but follow-up checked only experienced suppliers. Can it support the same claim?

Worked answer

Not without a narrower scope or additional evidence. Supplier mix changed. Record the limitation, collect a comparable follow-up or restrict the conclusion to the population actually checked. A percentage alone does not remove selection bias.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

2. Interpret partial improvement and recurrence

Understand the decision

A lower defect rate can be encouraging while still missing the agreed target. If six of thirty items were affected before and two of forty afterwards, the observed rate fell from 20% to 5%. If the criterion was zero recurrence, it was not met. Record both the improvement and the remaining failure.

Apply it in Sentinel

Record Recurrence observed with the supporting reference, then choose an outcome consistent with the target and remaining mechanism. The server prevents Effective when recurrence is recorded. Use Partly effective or Not effective with a reason, or Inconclusive when the evidence cannot support a judgement. Plan further corrective work separately and link it.

Practical task

Review 6/30 before and 2/40 after against a zero-defect target.

Worked answer

The observed rate is lower, but two affected items remain and the target is missed. Partly effective may be justified if the evidence supports a real bounded improvement; record recurrence, its mechanism and the next action. Do not label it Effective.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

3. Review and reopen with a reason

Understand the decision

Review is a controlled decision, not a final opportunity to tidy inconvenient evidence. Check the source-action link, implementation evidence, periods, sample definitions, recurrence search and target. Ask whether the conclusion would still be reasonable if the reviewer had not led the change.

Apply it in Sentinel

Save Draft and Files before submission. A distinct assigned manager completes review with a review note. To revise reviewed scope or evidence, reopen to Draft with a reason and obtain fresh review. Use History to explain the change; use Export this register for a dated snapshot under the organisation’s handling rules.

Practical task

A new defect appears after an Effective review. Should the old outcome be silently overwritten?

Worked answer

No. Preserve the reviewed conclusion and its original scope. Reopen with a reason where that record needs revision, or create the appropriate next review with a clear reference. Record the new evidence and corrective response, then seek independent review again.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

Intermediate knowledge check

Choose one answer per question. Each is worth one point; seven correct answers meet the 70% course threshold. Try all ten before reading the answer key.

1. What is the key distinction in an improvement review?

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2. Does the improvement review automatically close the linked action?

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D. Yes, when a file is attached.

3. What does the percentage measure?

A. Predicted incident probability.

B. Training hours per person.

C. Affected items divided by total items checked.

D. Guaranteed financial return.

4. Who completes the independent review?

A. The creator using the same account.

B. An anonymous visitor.

C. The software without a decision.

D. A distinct assigned reviewing manager.

5. Six of thirty before and two of forty after gives which rates?

A. 20% and 5%.

B. 6% and 2%.

C. 30% and 40%.

D. 5% and 20%.

6. The zero-defect target was missed despite a lower rate. What should be recorded?

A. A smaller denominator to improve the result.

B. The improvement and the remaining recurrence with a reasoned outcome.

C. Effective because the rate fell.

D. Zero recurrence.

7. Can Effective be selected with Recurrence observed?

A. Only by removing the source link.

B. Only if the creator reviews it.

C. No, the workflow rejects that combination.

D. Yes, without explanation.

8. Different supplier mixes in before and after samples create what issue?

A. Automatic proof of success.

B. A reason to omit the periods.

C. No issue if percentages are shown.

D. Comparability and selection bias.

9. New evidence after review should be handled how?

A. Preserve history, reopen with a reason or create a linked next review as appropriate.

B. Silently overwrite the old conclusion.

C. Delete the original sample.

D. Ignore it because Reviewed is final.

10. Which chronology is appropriate?

A. An end date before its start date.

B. Baseline before implementation and follow-up on or after it.

C. Follow-up before implementation.

D. Both observed periods in the future.

Intermediate answer key

1. A — An action can be completed without solving the problem.

2. B — Source and action workflows remain separate.

3. C — The measure is a simple observed proportion with a defined denominator.

4. D — The workflow requires a separate review decision and traceable account.

5. A — Rates require the appropriate denominator for each sample.

6. B — Partial improvement does not equal target achievement.

7. C — The outcome must be consistent with the recorded recurrence.

8. D — Rates alone do not correct different populations or selection methods.

9. A — The record should show what was known and why the judgement changed.

10. B — Dates must support the intended before-and-after comparison.

Advanced

Govern improvement claims, competing explanations and sustained learning across the suite.

Prerequisite: Complete the preceding level or demonstrate equivalent practical knowledge. Practise only in an authorised training workspace.

1. Challenge the explanation behind the trend

Understand the decision

Before-and-after evidence is observational. Workload, supplier mix, seasonality, reporting and other changes can contribute to the result. A temporal sequence does not by itself establish causation. The purpose is a defensible operational decision, with uncertainty stated, not a claim of scientific proof from one small sample.

Apply it in Sentinel

In comparability and evidence record relevant concurrent changes and plausible alternative explanations. Retain the scope of the conclusion. If a more rigorous evaluation is needed, obtain suitable statistical or specialist support rather than forcing the register's simple percentage into an unsupported model.

Practical task

Defects fell after training, but the supplier and product design also changed. What should the report claim?

Worked answer

Report the observed change and all relevant concurrent changes. Explain that the evidence does not isolate the training effect. Assess each plausible mechanism and collect further evidence where needed before attributing the result to one intervention.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

2. Use reviews to find organisational learning

Understand the decision

A collection of closed actions is not a learning system. Look for repeated mechanisms, controls that failed under similar conditions and improvements that did not transfer. Retain site and task context. Do not rank teams solely by reported defects when reporting confidence differs.

Apply it in Sentinel

Bring reviewed improvement records to Management reviews with their source links, outcomes and next dates. Agree priorities, resources and ownership. Link resulting controlled-document and competence changes through their separate workflows. Academy completion references can be recorded, but there is no automatic Academy-to-Sentinel competence synchronisation.

Practical task

Three sites report different results after the same instruction change. What should management investigate?

Worked answer

Compare implementation, task conditions, staffing, measurement and reporting before deciding. Identify which mechanism the change addressed at each site. Retain differences and choose targeted action, rather than declaring the instruction universally successful or unsuccessful.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

3. Set the boundary of a commercial claim

Understand the decision

An improvement story is strongest when its scope is clear: problem, change, observed result, recurrence and next review. Avoid converting a short sample into guaranteed savings, permanent risk elimination or a certification claim. Distinguish fictional examples from customer evidence and obtain proper authority before reusing customer material.

Apply it in Sentinel

Use the current Feature & Readiness Register in demonstrations, quotations and support. Demonstrate the fictional public examples, then the authorised training workspace. Explain the named-seat package and manual decision boundaries. Keep the next review date visible and assign responsibility for checking whether the improvement lasts.

Practical task

Rewrite: “Sentinel eliminated defects and proves the training paid for itself.”

Worked answer

In the fictional teaching sample, affected records fell from 8/40 to 0/60 after the stated changes. The review records comparability, recurrence checks and follow-up. This does not establish permanent elimination, isolate the training effect or calculate financial return.

Ready to continue?

Can another person follow your evidence, decision and next action without asking you to reconstruct the reasoning?

Advanced knowledge check

Choose one answer per question. Each is worth one point; seven correct answers meet the 70% course threshold. Try all ten before reading the answer key.

1. What is the key distinction in an improvement review?

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3. What does the percentage measure?

A. Predicted incident probability.

B. Training hours per person.

C. Affected items divided by total items checked.

D. Guaranteed financial return.

4. Who completes the independent review?

A. The creator using the same account.

B. An anonymous visitor.

C. The software without a decision.

D. A distinct assigned reviewing manager.

5. Training, supplier and design all changed before improvement. What is justified?

A. Report the observed change and the competing explanations.

B. Attribute all benefit to training.

C. Attribute all benefit to the software.

D. Ignore the other changes.

6. What does a temporal sequence establish by itself?

A. Permanent control.

B. That one recorded event preceded another, not causation.

C. A proven causal mechanism.

D. A financial return.

7. Different site results should prompt what?

A. Removal of the worse site.

B. A league table without context.

C. Comparison of implementation, conditions and measurement.

D. A universal success claim.

8. How does Academy completion enter Sentinel competence evidence here?

A. Automatic synchronisation and authorisation.

B. Automatic licence expansion.

C. Automatic independent review.

D. Through a recorded reference and the separate competence process.

9. Which commercial statement is defensible?

A. The fictional sample fell from 8/40 to 0/60 under the stated conditions.

B. Sentinel guarantees zero defects.

C. Training ROI is proven by the percentage.

D. ISO certification is automatically awarded.

10. What makes organisational learning more than action closure?

A. Reusing the same fix everywhere without checking.

B. Using outcomes, recurrence and context to change controls and review their persistence.

C. Counting closed actions only.

D. Deleting inconclusive reviews.

Advanced answer key

1. A — An action can be completed without solving the problem.

2. B — Source and action workflows remain separate.

3. C — The measure is a simple observed proportion with a defined denominator.

4. D — The workflow requires a separate review decision and traceable account.

5. A — The observation does not isolate the effect of one intervention.

6. B — Further evidence is needed for a causal claim.

7. C — Variation can reveal different mechanisms and measurement conditions.

8. D — Training references do not automatically prove or authorise competence.

9. A — A bounded, labelled example is accurate; broader claims need separate evidence.

10. B — Learning requires testing the result and its transferability over time.

Practice worksheets

Evidence and decision record

Fictional record reference / company	
Applicable requirement and revision	
Scope, sample and exclusions	
Evidence reference and observation	
Decision and rationale	
Owner / reviewer / due date	

What changed after we fixed it?

Source and corrective-action link	
Problem and success criterion	
Baseline period / affected items / total checked	
Implemented change and date	
Follow-up period / affected items / total checked	
Comparability and other changes	
Recurrence check and evidence	
Outcome, rationale and next review	

Facilitator and assessment guidance

Before delivery, confirm the current software version and review the Feature & Readiness Register. Use a designated training company with fictional evidence. Arrange separate owner and reviewer accounts where the exercise requires them; do not share passwords. Explain that a screenshot is a reference view, not an approval instruction.

Ask learners to explain the requirement, source, decision and next step. Challenge unsupported causal claims. In group work, use one person as owner and another as reviewer, then swap roles. A reviewer should identify missing evidence as readily as confirm a supported result.

For Starter, assess correct navigation and factual recording. For Intermediate, assess links, evidence quality, comparable samples and review rules. For Advanced, assess boundaries, alternatives, escalation and sustained learning. Use the worked answers as criteria, not scripts that learners must repeat word for word.

The online test has ten single-choice questions and a 70% pass mark. Review incorrect answers with the learner and revisit the relevant lesson. Do not represent a knowledge-test pass as practical competence. Record workplace observation separately where required by the organisation.

Support handover: record company, role, record reference, attempted action, time and displayed error. Never request a password. Avoid sending unnecessary evidence in a support email. For unavailable controls, check company, entitlement, licence, stage and independent-review allocation.

Document control: replace local copies when a new approved edition is issued. Keep historical editions clearly marked as superseded. Use the online register for the current release status and open acceptance work.