JBIRD

QMS · AS9100D · AS9120B · AS9110C · ISO 9001:2015

Your demo, step by step.

A road map for evaluating JBird — where to start, what to enter, and in what order, from the first click to the point where the system is yours to drive.

Your co-pilot for quality, compliance, and continual improvement.

Read this first

You do not have to set anything up to begin. There are two ways in — look around a system that is already populated, or start empty and put your own information in. Both are covered here, and you can do them in either order.

Quality Management Veteran's, Inc.
Elmira, New York

jbirdqms.com
Evaluation guide · Rev. 3 · 24 September 2026

HOW TO USE THIS GUIDE

Two ways to start. Neither one is wrong.

A quality management system is not something you evaluate by reading a feature list. You evaluate it by putting your own organization into it and seeing whether the shape fits. This guide gets you to that point as directly as possible.

DOOR 1 · NOTHING TO ENTER

Walk a system that is already full

Four fictional organizations, each fully populated — process maps, people, documents, audits, nonconformances. Three are aerospace; the fourth holds ISO 9001:2015 and no sector standard at all. Open anything, change anything. Best for the first 30 minutes, and for anyone who wants to see the finished state before building toward it.

DOOR 2 · YOUR INFORMATION

Start empty and fill it with your own

A blank organization that you populate — either by typing your information in as you go, or by importing what you already have from spreadsheets. This is the part that tells you whether JBird fits *your* company.

The recommended sequence. Spend half an hour behind Door 1 first. It costs you nothing, it requires no data, and it makes every step behind Door 2 obvious — you will already have seen what a finished process map, a completed clause and a closed nonconformance look like before you are asked to create your own.

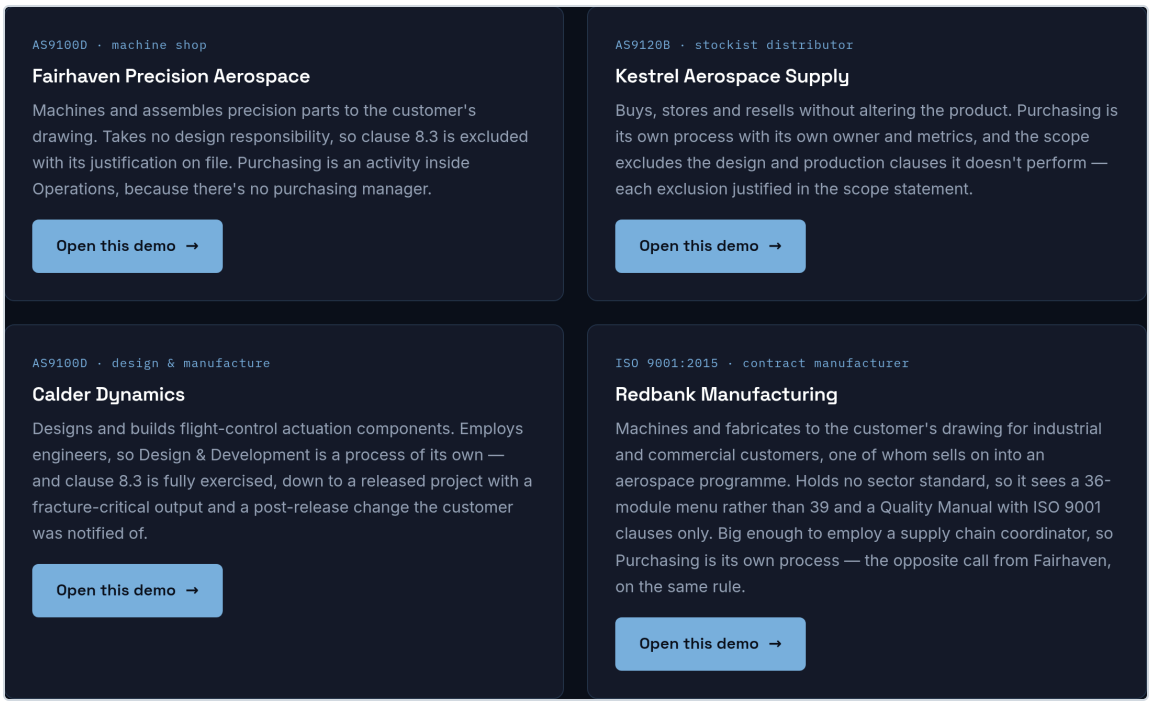
What is in this guide

Part 1	Look around first — the four demo organizations, and the ten minutes that are worth your attention in each
Part 2	Getting your own system started — one question, then a step-by-step path that adapts to your answer
Part 3	Track A — *“This is our first quality management system”*
Part 4	Track B — *“We already have one — help me bring it in”*
Part 5	Where the road map ends and it becomes your call
Part 6	Practical notes, and a one-page checklist to work from

PART 1 · DOOR 1

Look around first

Go to **jbirdqms.com/demo** and pick the organization closest to your own. No form, no signup, no call. The demo is the real application with a fictional company already loaded into it.



Four organizations, because a QMS should look like the company running it. The differences are not cosmetic — the distributor legitimately excludes clauses the machine shop cannot, the design house carries a whole clause the others scope out, and the ISO 9001 shop sees three fewer modules than the aerospace ones because those clauses are not in its standard.

PICK THIS ONE	IF YOU ARE…
Fairhaven Precision Aerospace	An AS9100D machine shop building to the customer’s drawing. Takes no design responsibility, so clause 8.3 is excluded with its justification on file.
Kestrel Aerospace Supply	An AS9120B stockist distributor. Buys, stores and resells without altering the product; purchasing is its own process with its own owner and metrics.
Calder Dynamics	An AS9100D design-and-manufacture business. Employs engineers, so Design & Development is a process of its own and clause 8.3 is fully exercised.
Redbank Manufacturing	An **ISO 9001:2015** contract machine and fabrication shop, with no aerospace sector standard. Machines to the customer’s drawing for industrial and commercial customers, one of whom sells the finished assembly into an aerospace programme — so aerospace requirements arrive as ordinary contract terms rather than as a certification Redbank holds.

If you hold ISO 9001:2015 and nothing else, open Redbank. It is the one demo told there is no sector standard, and it is visibly a different product for it: 36 modules instead of 39, a Quality Manual carrying ISO 9001 clauses only, an applicability assessment covering 22 clause 8 requirements where Fairhaven's covers 31, and printed reports headed **JBird QMS · ISO 9001:2015** rather than a list of standards you do not hold. Nothing is withheld pending an upgrade: those three modules exist to serve clauses that are in AS9100D, AS9120B and AS9110C and are simply not in ISO 9001.

Nothing you do in the demo is saved. Every record in it is invented. Change anything you like — edit a process, close a nonconformance, move a due date — and a browser refresh puts it all back. The demo is a shared evaluation environment, so treat it as public: do not type anything into it you would not want another visitor to read.

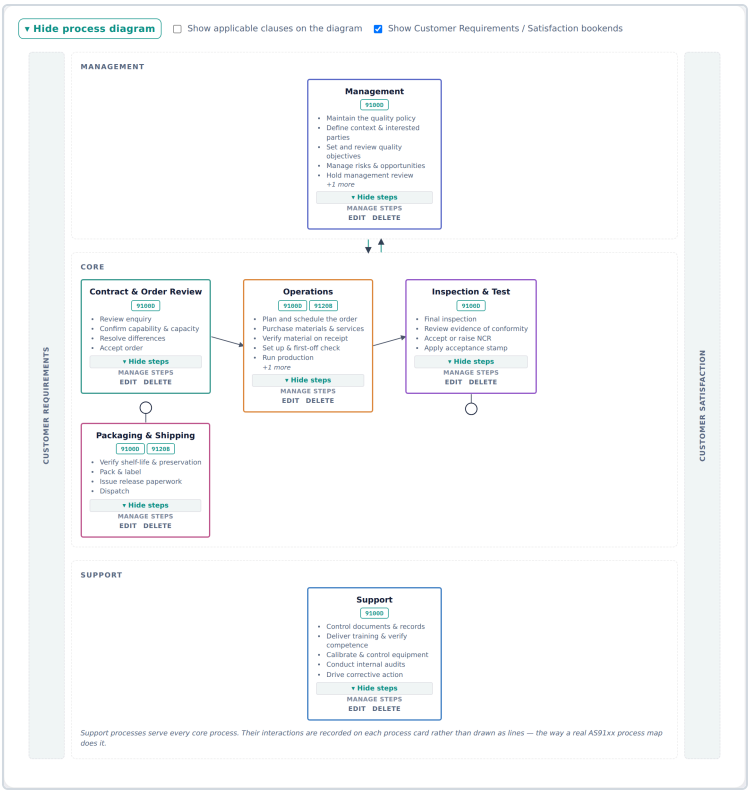
The ten minutes worth spending

LOOK AT — 01

The process map you land on

The demo opens on **Interaction of Processes** — deliberately, because that is where a real implementation starts too. Note that it is a working builder, not a picture: every box is a process record with an owner, interfaces, KPIs and sub-steps behind it. In your own organization the diagram starts folded away behind a **Show process diagram** button, so the page opens on the list of processes; the demos open with it showing.

Notice too the small clause numbers under each screen's title, and under every module name in the module menu. Each screen names the clauses it serves, so "where does 8.7 live?" is answered before you have to ask it.

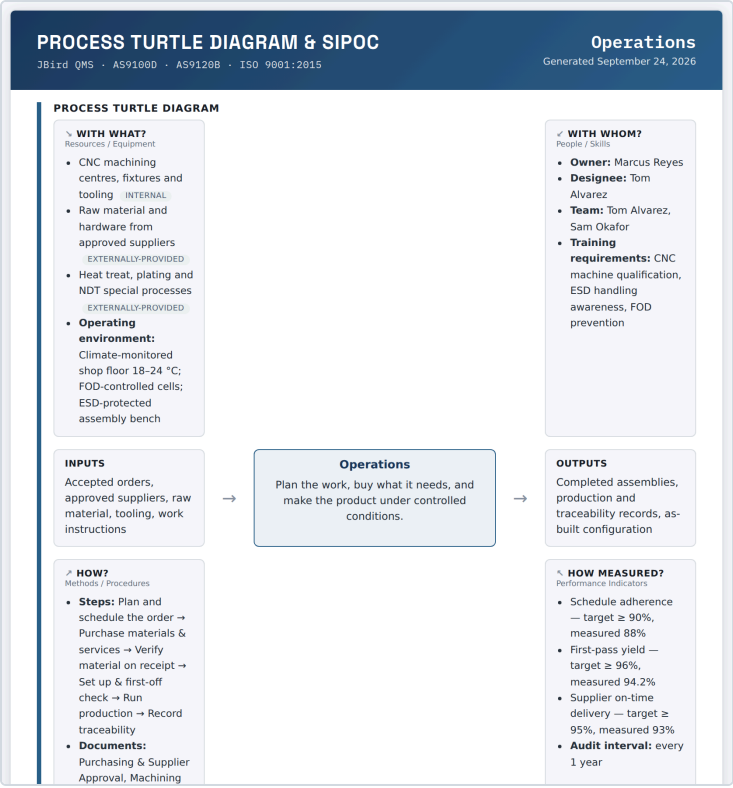


Fairhaven's process map. Management on top, Core in the middle, Support below — and Purchasing folded into Operations, because this shop has no purchasing manager. Your map will not look like this one, and that is the point.

LOOK AT — 02

A process, and its turtle diagram

Click a process box — **Operations** is a good one — to open its detail screen: owner and designee, inputs and outputs, interactions, audit status, team training and sub-steps. The **Turtle Diagram / SIPOC** button is at the top of that screen. Everything on the report is built from fields the process record already holds — nothing is retyped, and nothing is a separate document to maintain.

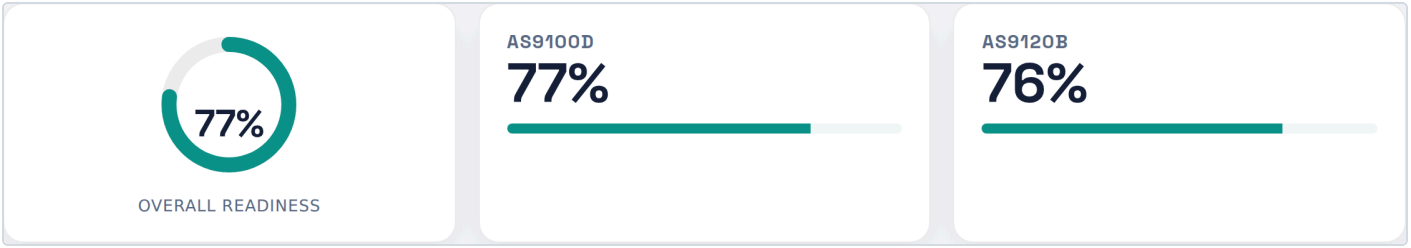


Fairhaven's Operations process as a turtle diagram: resources, people, methods and measures, every one drawn from the process record rather than typed a second time.

LOOK AT — 03

The Dashboard, and what feeds it

The readiness percentage in the top-right corner of every screen is computed, not entered. On the Dashboard it breaks down by the standards the organization actually holds: Fairhaven, which holds AS9100D and AS9120B, shows an overall figure and one for each; Redbank, which holds ISO 9001:2015 alone, shows one figure and no sector standards it does not hold. Follow any of them back through Gap Analysis and you can see exactly which clause moved it and why.



Readiness on Fairhaven's Dashboard: overall, then one figure per sector standard it holds — and only those.

LOOK AT — 04

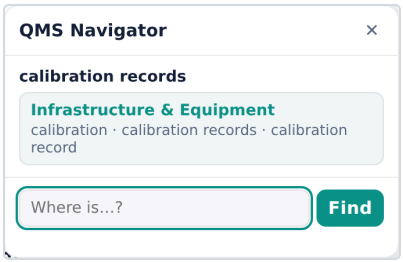
A closed nonconformance, and a PEAR

Open the **NCR / CAPA** module and read one all the way through — root cause, correction, CAPA, effectiveness verification. Then open **Internal Audits** and read a Process Effectiveness Assessment Report. If you have sat through an AS91xx certification audit, these two screens will tell you quickly whether the system speaks your language.

LOOK AT — 05

The Navigator, when you cannot find something

The **? Where is this?** button sits in the bottom-right corner of every screen. Type a clause number (**8.4.1**) or plain English (**calibration records**, **internal audit schedule**) and it names the module that holds it, with a link straight there. It is the fastest way to test the question every auditor asks: *show me where you do this*.

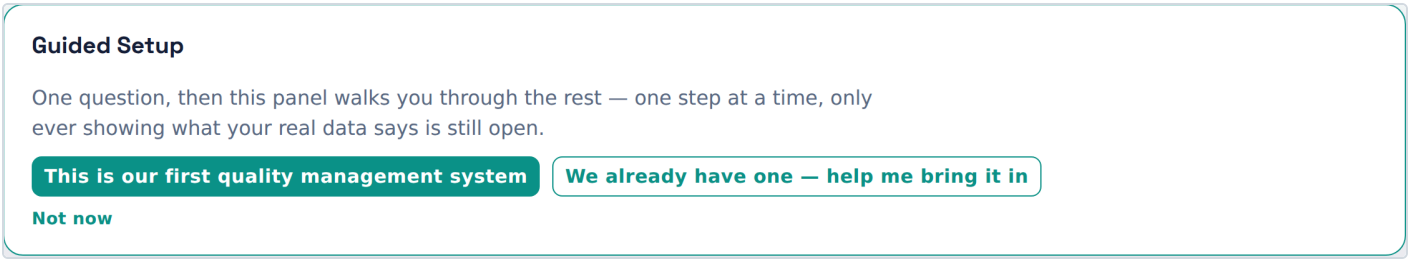


The QMS Navigator answering “calibration records”.

PART 2 · DOOR 2

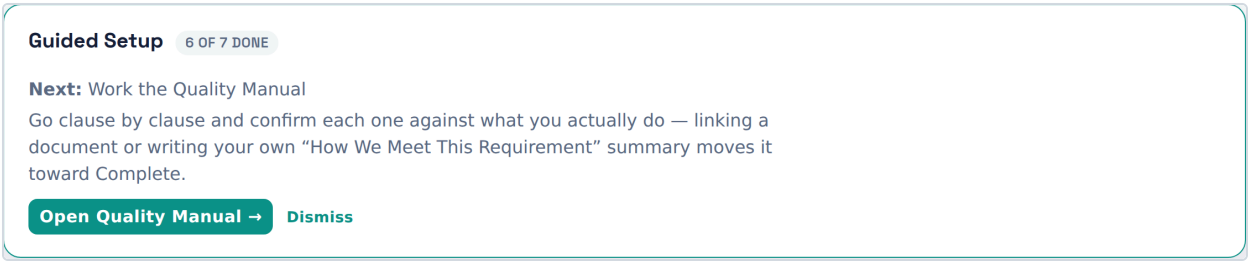
Getting your own system started

When you open your own JBird organization for the first time, the Dashboard asks you one question. Your answer decides the order of everything that follows, because bringing in a QMS you already have is a genuinely different job from building a first one.



The one question. Answer it and the panel walks you through the rest, one step at a time — showing only what your real data says is still open.

From then on, the Guided Setup panel sits at the top of the Dashboard and tells you what is next. It does not track your progress with a checkbox you tick — it reads your actual records. A step goes green because every process really does have an owner, not because you said it did.



The panel in use: how many steps are genuinely done, what the next one is, why it matters, and a button that takes you straight there.

> **You can ignore all of it.** Guided Setup is a convenience, not a gate. Dismiss it and every module stays fully available — nothing in JBird is locked behind a setup sequence. The road map below is simply the order that wastes the least of your time.

Which track are you on?

ANSWER	GO TO
“This is our first quality management system”	**Part 3 — Track A.** Seven steps. You are building the structure from scratch, so the process map comes early and documents come last.
“We already have one — help me bring it in”	**Part 4 — Track B.** Seven steps. You already have the content, so importing comes second and the last step is reconciling what you have against the clause structure.

> **If you are certified and coming up on a surveillance audit,** you are on Track B even if your existing system is a shared drive full of Word files. “We already have one” means you have records worth keeping, not that you have software.

PART 3 · TRACK A

This is our first quality system

Seven steps, in this order. Steps 1 through 5 are the foundation and are worth finishing in one or two sittings. Steps 6 and 7 are ongoing work that never really ends — which is the honest answer, and the same answer any consultant would give you.

A word about the time estimates. Every step below carries a typical duration. They assume one person who knows the business, working without interruption, and they are for the *first pass* — good enough to see the system work, not a finished QMS. A real implementation is measured in weeks, and most of that time is thinking about your processes, not typing.

STEP 1 OF 7

~5 minutes

Choose your applicable standards

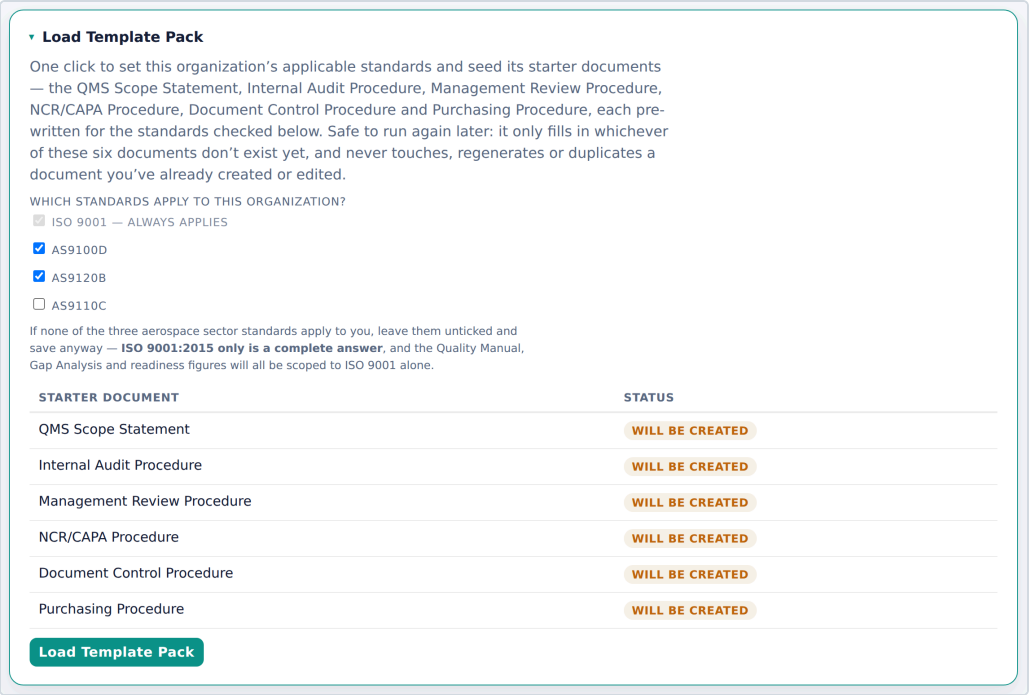
`Dashboard → Load Template Pack`

Every organization in JBird carries ISO 9001:2015 at minimum. Tick whichever sector standard also applies — AS9100D, AS9120B, AS9110C. That single choice sets the clause scope for the entire system: the Quality Manual, the Gap Analysis and every module that references a clause all follow from it.

If none of the three apply to you, leave all three unticked and save anyway. ISO 9001:2015 on its own is a complete answer, not an unfinished one, and the system treats it that way: the Quality Manual, the Gap Analysis, the clause 4.3 applicability assessment and the readiness figure all narrow to ISO 9001 alone, the sector-standard notes on each clause disappear, and the three modules that exist only to serve AS91xx clauses come out of the module bar. Leaving the boxes empty and saving is the answer, not a way of skipping the step.

The same click seeds six starter documents, each pre-written for the standards you checked: **QMS Scope Statement**, **Internal Audit Procedure**, **Management Review Procedure**, **NCR/CAPA Procedure**, **Document Control Procedure** and **Purchasing Procedure**. They are a working starting point to edit, not boilerplate to accept — but they mean you are not staring at an empty Documents tab on day one.

Safe to run again later. It only fills in whichever of the six do not exist yet, and never touches, regenerates or duplicates a document you have already created or edited. Once your standards are set, the panel folds shut under its **Load Template Pack** heading; click the heading to open it again.



Step 1. Tick the sector standards that apply, or none of them, then save. The six starter documents are written for whatever you chose.

STEP 2 OF 7

45–90 minutes

Build your process map

`Interaction of Processes → IOP Archetype Library`

This is the step everything else in JBird is built on, and it is the one worth slowing down for. Do not start from a blank diagram. Open the **IOP Archetype Library** and pick the ready-made map closest to your organization. There are six: AS9100D Manufacturer, AS9120B Distributor, AS9100D Design & Manufacture, ISO 9001:2015 Manufacturer, AS9110C MRO, and Multi-Site AS9100D Manufacturer. Applying one seeds a complete starter map: processes, sub-steps, interactions, owners, KPIs, resources and training requirements.

Then edit it into your own shape. Applying an archetype only ever adds what is not already on file — it never renames or duplicates anything you have since changed — so you can apply one and start cutting.

The rule of thumb for "is this a process?" If nobody in your organization is primarily executing an activity, it is probably not a separate process — it is an activity folded into a broader one. A shop with no purchasing manager does not have a Purchasing process; it has purchasing as an activity inside Operations. This is why the archetypes reach different answers to the same question — Fairhaven folds purchasing into Operations, while Kestrel and Redbank each give it a process and an owner of its own — and why picking one and then splitting or merging a process yourself is a choice made against a named rule rather than a guess.



The Archetype Library: six ready-made maps, each opening onto its processes, with the granularity rule stated plainly under "How this works".

STEP 3 OF 7

~15 minutes

Name an owner for every process

`Interaction of Processes → open a process → Owner`

Clause 4.4.1(a) asks for this directly, and JBird uses it for more than compliance: responsibility for a process's documents flows down from its owner automatically, and so does who has to approve a change to them. Getting owners right here saves re-work in step 6.

STEP 4 OF 7

30–45 minutes

Give every process an interface and a KPI

`Interaction of Processes → open a process`

Clause 4.4.1(b) and (c): each process needs at least one interface — its connection to another process — and at least one named indicator you actually monitor. Any process missing either is flagged directly on the diagram, so you can see the holes rather than hunt for them.

Resist the urge to invent metrics to fill the field. A KPI you do not actually watch is worse than an obvious gap, and an auditor will find it faster than you will.

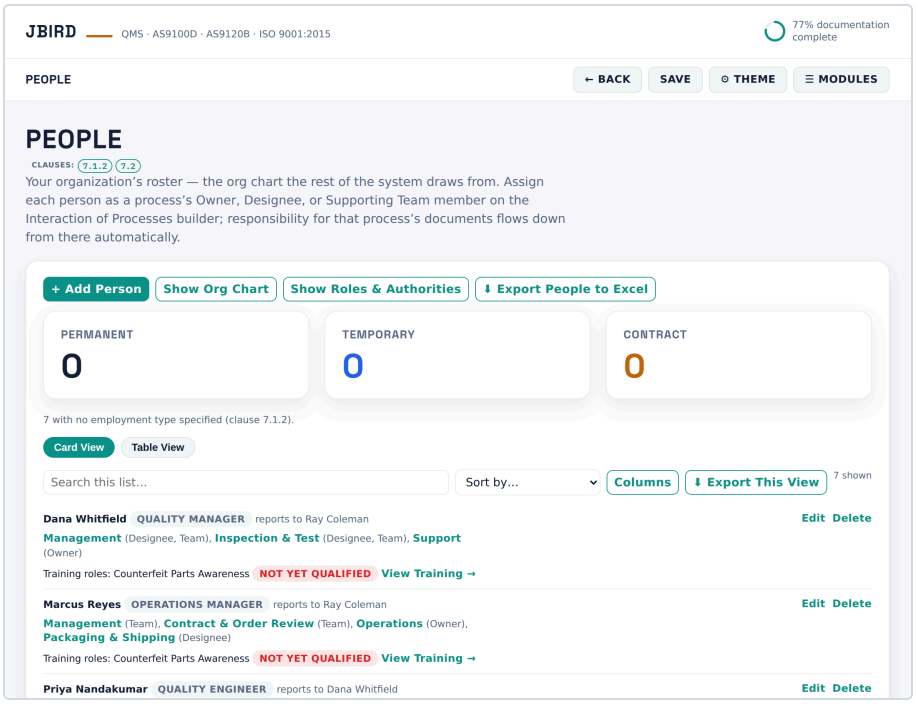
STEP 5 OF 7

~20 minutes

Add your people

People

The roster the rest of the system draws from. Add the real people who fill the roles on your process map — or bring in a whole roster from a spreadsheet on the Data Import tab if you already have one. Once someone is on file here they can be assigned as a process's Owner, Designee or Supporting Team member, and their training requirements follow from those assignments rather than being maintained separately.



People is the org chart the rest of the system reads from — training requirements, document responsibility and approval authority all trace back to it.

STEP 6 OF 7

Ongoing

Add your documents

Documents

The procedures, work instructions and forms your QMS actually runs on. Each one attaches to a process from your map, and inherits that process's owner, designee and supporting team — so you are not maintaining a separate matrix of who owns what.

The owner or designee approves the document initially and every time it changes. Every approval logs who signed off and when, and reopens the training checklist for that process's people. This is the mechanism that makes step 7 move.

STEP 7 OF 7

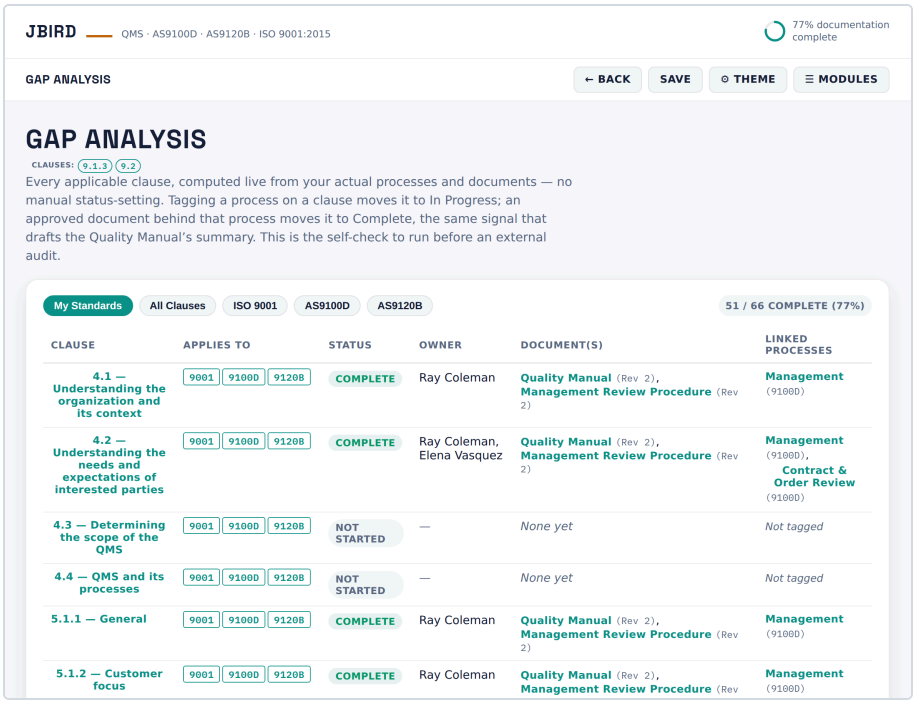
Ongoing

Work the Quality Manual

`Quality Manual → then check Gap Analysis`

Go clause by clause and confirm each one against what you actually do. For each requirement the manual states what each applicable standard demands first, then gives you a separate summary of how *your* organization meets it — drafted automatically once the linked documents are approved, and yours to rewrite in your own words.

Watch **Gap Analysis** as you go. Nothing there is set by hand: tagging a process on a clause moves it to In Progress, and an approved document behind that process moves it to Complete. It is the self-check to run before an external audit, and the number in the corner of the screen is the same number your certification body will effectively be scoring.



Gap Analysis, computed live from your real processes and documents. No manual status-setting, which also means no way to flatter yourself.

PART 4 · TRACK B

We already have one — help me bring it in

Same seven-step shape, different order and a different ending. You are not building a system; you are moving one, and then finding out honestly where it already covers you and where it does not.

STEP 1 OF 7

~5 minutes

Choose your applicable standards

`Dashboard → Load Template Pack`

Identical to Track A: tick your sector standards to set the clause scope for the whole system, or tick none of them if ISO 9001:2015 is the only standard you hold. The six starter documents still get seeded — and if you are importing your own equivalents in the next step, they will simply sit alongside yours for comparison. Nothing you import is overwritten.

STEP 2 OF 7

1–3 hours

Import your existing records

`Data Import`

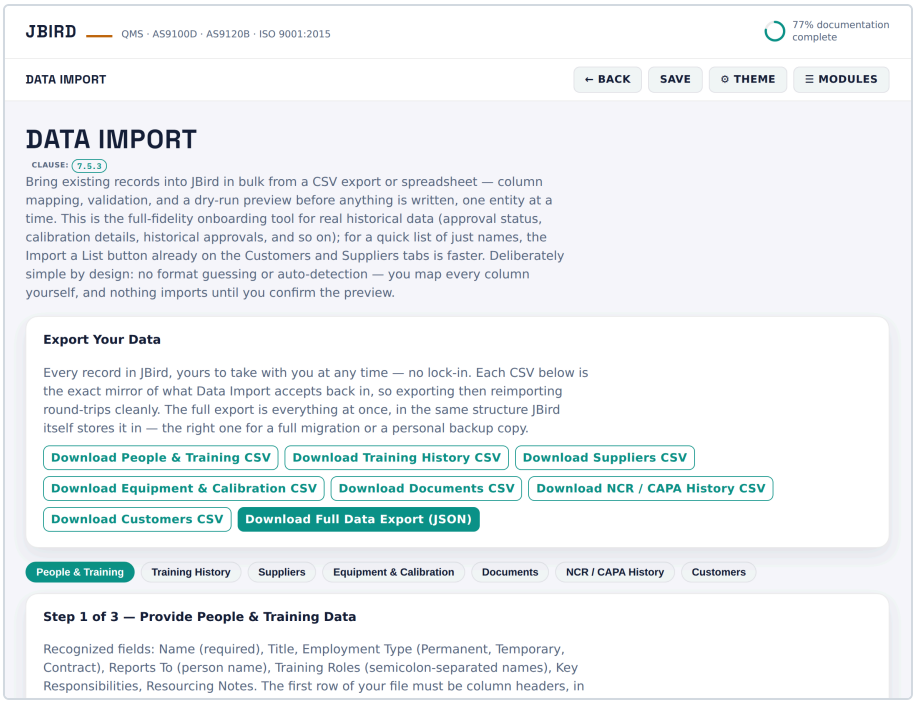
Seven entities can come in from a CSV export or spreadsheet, one at a time:

- **People & Training** — the roster, reporting lines and training roles
- **Training History** — completions, methods, sign-offs and trainers
- **Suppliers** — with their clause 8.4.1.1 approval status and scope
- **Equipment & Calibration** — including calibration detail for measuring and monitoring equipment
- **Documents** — with their historical approver and approval date
- **NCR / CAPA History** — past nonconformances with their clause, origin and owner
- **Customers** — the register the rest of the system picks from

Two more, **Inventory Part Master** and **Bills of Material**, appear when the optional Production / Operations modules are switched on (see Part 5), for nine in all.

This is the full-fidelity route, and it is deliberately unclever: no format guessing, no auto-detection. You map every column yourself, and nothing is written until you confirm a dry-run preview. If all you need is a quick list of names, the **Import a List** button already on the Customers and Suppliers tabs is faster.

Imported history behaves like real history. A document brought in with a historical approver and date gets a genuine, dated approval record — not a badge that says “imported”. Historical nonconformances get real NCR numbers in the live sequence. Which means the moment the import finishes, your Gap Analysis and Dashboard already reflect the system you have been running, not an empty shell.



Data Import — and, above it, Export Your Data. Every record in JBird is downloadable as CSV or as a full JSON export at any time, in the exact structure the importer accepts back. There is no lock-in to discover later.

STEP 3 OF 7

45–90 minutes

Build your process map

`Interaction of Processes → IOP Archetype Library`

You already have a process map — the job here is transcribing it, not inventing it. Pick the Archetype Library entry closest to your existing map and then edit it to match. It is almost always faster than starting from a blank diagram, even when your map differs substantially, because the archetypes arrive with owners, KPIs, interfaces and training requirements already populated.

STEP 4 OF 7

~15 minutes

Name an owner for every process

`Interaction of Processes → open a process → Owner`

If you imported your roster in step 2, these are dropdown picks rather than typing. Clause 4.4.1(a), and the basis for document responsibility throughout the system.

STEP 5 OF 7

30–45 minutes

Give every process an interface and a KPI

`Interaction of Processes → open a process`

Clause 4.4.1(b) and (c). Use the indicators you already report at management review — this step is usually a transcription job too, and the ones you struggle to fill in are worth noticing.

STEP 6 OF 7

~20 minutes

Confirm your people

`People`

Check the imported roster against the roles on your map: reporting lines, training roles and anyone who joined since the spreadsheet you exported. Small step, but every training gap the system later reports depends on it being right.

STEP 7 OF 7

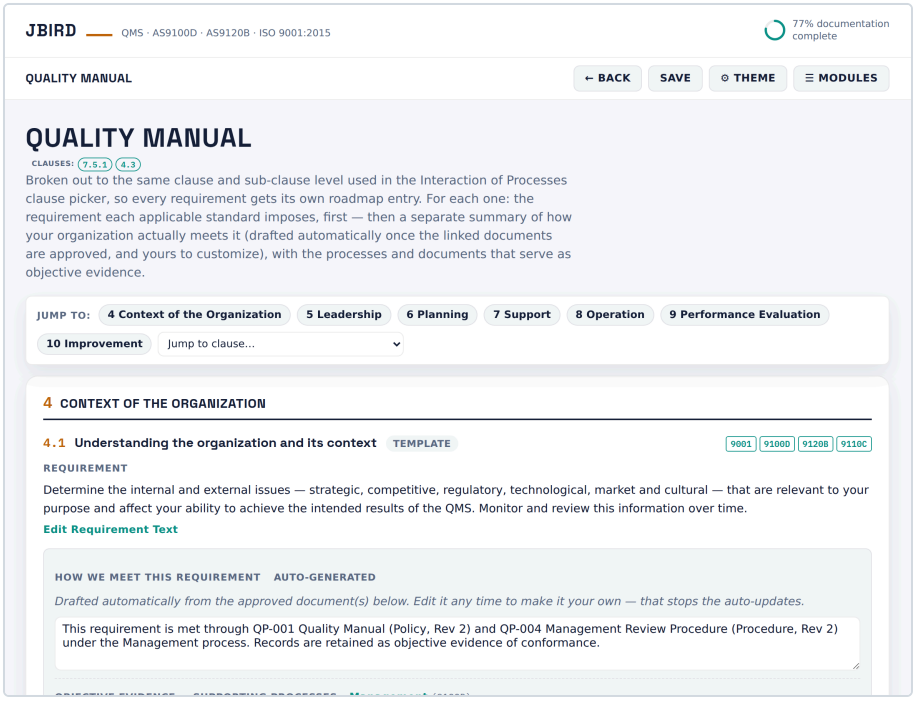
2–4 hours, and worth every minute

Reconcile your system against the clause structure

`Dashboard → Guided Setup → Start Reconciliation`

The step that makes Track B worth doing. JBird walks you through the Quality Manual once, clause by clause — every clause in scope under your standards that is not yet addressed. For each one you do exactly one of three things: link a document you already have, describe how you meet it in your own words, or leave it and move on.

Nothing here is graded and you can stop and come back. What you get at the end is the thing that is genuinely hard to produce any other way: an honest, clause-by-clause statement of where your existing system already covers you and where the real gaps are — found by you, on your own schedule, rather than by an auditor on theirs.



The Quality Manual, broken out to the same clause and sub-clause level as the process clause picker — so every requirement gets its own entry rather than hiding inside a paragraph.

PART 5

Where it becomes your call

Once the seven steps are behind you, the road map ends — on purpose. What you look at next depends entirely on what you are actually trying to find out, and you know that better than any guide does. The ☰ **MODULES** button in the top-right corner opens the full list, grouped six ways.



Thirty-nine modules, six groups, on an AS9100D organization. The small numbers under each name are the clauses that module serves. Everything is reachable from here at any time — nothing is locked behind setup.



The same menu on Redbank, which holds ISO 9001:2015 and no sector standard: thirty-six. Product Safety, Operational Risk Management and Special Processes & FAI are absent, because the clauses they serve are AS91xx additions not present in ISO 9001. The other thirty-six are identical.

> **Thirty-nine is the quality system.** An optional **Production / Operations** set adds six more modules — Bills of Material, Inventory, Purchasing, Routers, Work Orders and Travelers — for forty-five in all. They are not switched on in the demos, so every count in this guide (39, and 36 for an ISO 9001 organization) is the quality system on its own. Ask if you want to see them.

If what you want to know is…

“Would this survive my next surveillance audit?”

Go to **Internal Audits**. The program is modeled on the IAQG 9101 methodology your certification body uses — a QMS Process Matrix (9101 Form 2) marking every clause Conforming, Nonconforming, Not Evaluated or Not Applicable per audited process, and a Process Effectiveness Assessment Report (PEAR, 9101 Form 3) for each one. Nonconformances flow straight into NCR/CAPA. Then run **Gap Analysis** and read the number honestly.

“Does the nonconformance workflow match how we actually work?”

Open **NCR / CAPA** and raise one end to end. Root cause, correction plan and CAPA plan carry their own deadlines; full correction implementation is a firm deadline, and CAPA implementation stays open and tracked until it is verified at the next audit. Anything that crosses an escalation threshold creates an item in the **Action Tracker** automatically — one master list regardless of where the action came from.

“Does it handle the day-to-day, not just the paperwork?”

Suppliers (clause 8.4.1.1 approval, scope and performance review), **Infrastructure & Equipment** (calibration), **Training** (requirements driven by process assignment, with a matrix view), **Shelf-Life & Preservation**, **Records**

Retention, and **Release & Configuration**.

“Does it know aerospace, or is it a generic ISO tool with a badge?”

Product Safety (8.1.3, safety-critical items and a safety event log), **Operational Risk Management** (8.1.1, kept deliberately separate from the strategic 6.1 register), **Special Processes & FAI** (8.5.1.2 special process approval, 8.5.1.3 first article inspection, 8.5.1.4 new capability evaluation), and **Design & Development** (8.3, if it applies to you).

“I am ISO 9001 only. What am I not seeing, and does it matter?”

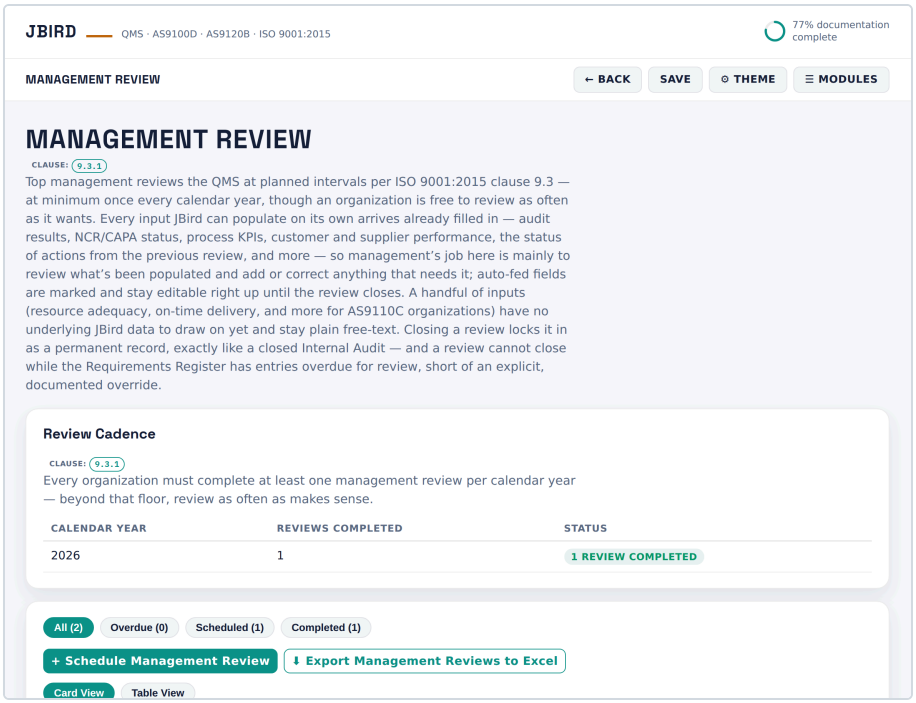
Three modules, named just above: Product Safety, Operational Risk Management, and Special Processes & FAI. Each exists to serve a clause that AS9100D, AS9120B or AS9110C adds and ISO 9001:2015 does not contain, so their absence is the system agreeing with your certificate rather than withholding anything. The same narrowing runs through the Quality Manual, the Gap Analysis, the clause 4.3 applicability assessment and the header printed on every report you generate.

It runs the other way too. If you later certify to a sector standard, tick it on the Load Template Pack panel and the modules, clauses and notes belonging to it appear. Nothing already in the system is re-entered.

Worth knowing if your customers are in aerospace without you being certified to it: their requirements reach you as contract flow-downs. That is exactly Redbank’s position, and its Customer Communication record shows it declining a customer’s request for an AS9102 first article report and offering a full dimensional report instead — in writing, because it does not hold AS9100 and says so. The record of that decision is the kind of thing an auditor asks to see.

“Will management review actually get easier?”

Open **Management Review**. Its inputs read live from the modules that own them — customer satisfaction from the 9.1.2 register rather than a count of complaints, risk effectiveness from the risk register’s own review logs, status of previous actions from the Action Tracker. Note also that a review cannot close while a Requirements Register entry is overdue for review, short of an explicit documented override.



Management Review, assembled from the modules that already hold the data rather than from a document someone rewrites every year.

PART 6

Practical notes

QUESTION	ANSWER
Getting around	The ☰ **MODULES** button, top right of every screen, opens the grouped module list. The bar to its left always names the section you are in. Can't find something? The **? Where is this?** button, bottom right, takes a clause number or plain English and names the module.
Getting your data out	Data Import → **Export Your Data**. Every entity as CSV, plus a full JSON export of everything at once. Each CSV is the exact mirror of what the importer accepts back, so exporting and reimporting round-trips cleanly.
Something looks wrong	The ⚑ **Report a Problem** button sits on every screen. Reports land in the Feedback module where anyone signed in to your organization can see and resolve them.
Light or dark	The ⚙ **THEME** button cycles light, dark and follow-your-system.
Who can approve what	Approval authority follows from process ownership, not from a separate permissions matrix. Account & Security holds your own sign-in security and a read-only view of the organization's identity and audit trail.
Template content	The seeded documents are a working starting point. Verify final clause references and wording against your own controlled copies of the standards before using them in a live QMS.

Your first-pass checklist

Tear this page off, or work down it on screen. Both tracks share the first item and the last.

Everyone

- [ ] Opened the demo closest to my organization and spent 30 minutes in it
- [ ] Answered the Guided Setup question on my own organization's Dashboard
- [ ] Ticked my applicable standards — or ticked none, if ISO 9001:2015 is the only one I hold — and loaded the Template Pack

Track A — first quality system

- [ ] Applied the closest IOP archetype and edited it into my real process map
- [ ] Every process has a named owner
- [ ] Every process has at least one interface and one KPI I actually monitor

- [ ] My people are on file and assigned to processes
- [ ] My first real procedures are in Documents and linked to their processes
- [ ] Walked the Quality Manual and watched Gap Analysis move

Track B — bringing an existing system in

- [ ] Imported people, training history, suppliers, equipment, documents, NCR history and customers
- [ ] Applied the closest IOP archetype and edited it to match my existing map
- [ ] Every process has a named owner
- [ ] Every process has at least one interface and one KPI
- [ ] Confirmed the imported roster against my current org chart
- [ ] Completed the clause-by-clause Reconciliation and read the result

Everyone, before you decide

- [ ] Raised one nonconformance end to end and watched where it went
- [ ] Ran an export and confirmed I can get my data back out
- [ ] Looked at the one module that matters most to my own audit history

Questions, or want a walkthrough?

EMAIL ron@jbirdqms.com

PHONE (607) 301-0689

WEB jbirdqms.com

Ron Stermer Jr., Founder — Quality Management Veteran's, Inc., Elmira, New York

If you get stuck on any step in this guide, the fastest fix is usually a fifteen-minute call rather than another read-through. Ask for one.