

Introduction to Dashboard

*Explore QMS Wrapper's Dashboard Features
for Efficient Management*

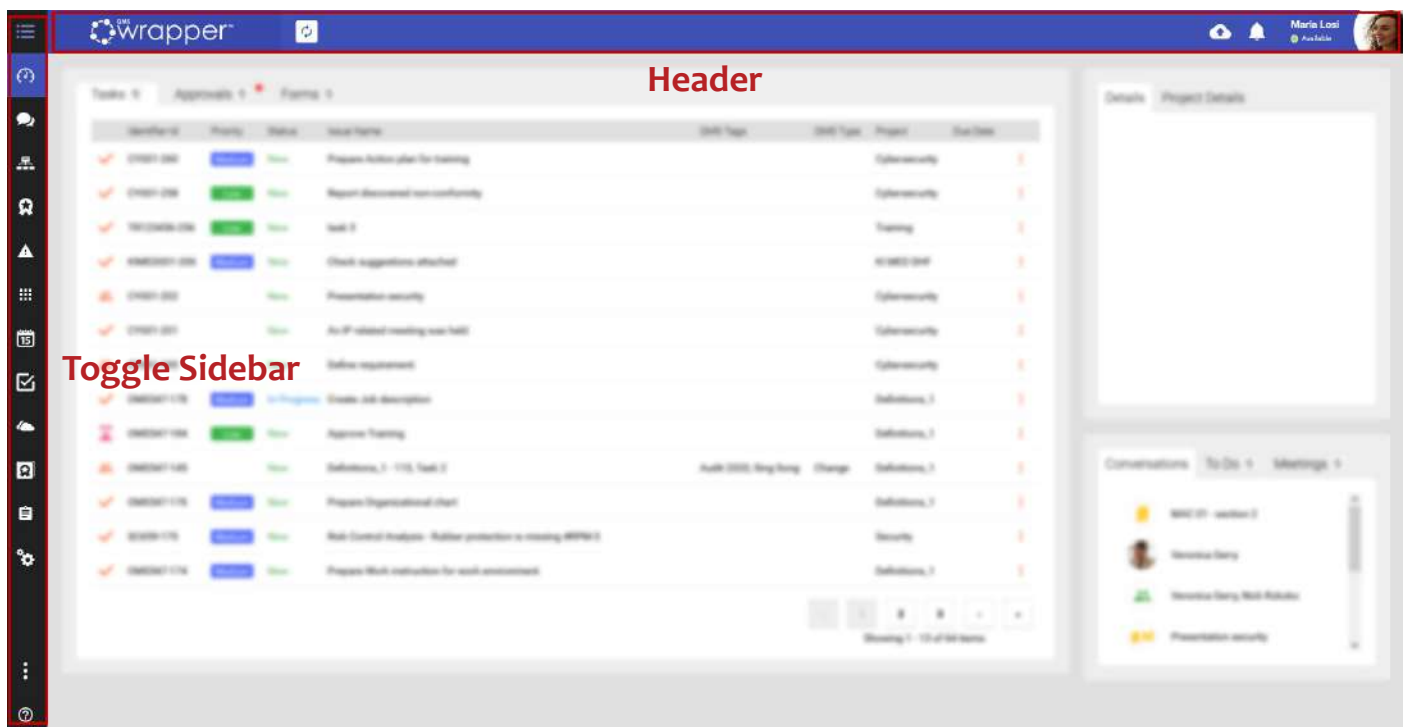


Dashboard

When you log in to qmsWrapper, the **Dashboard** page is the page that will welcome you. It is the main page where you can view all your current events.

Header and Toggle Sidebar

The **Header and Toggle Sidebar** are parts of the interface that will always be displayed, regardless of which module you are in. See the picture below:



The **Header** is the line with your profile image (top right), name, status, notification button, uploads (uploading process), and refresh button.

When you click on your **profile image or name**, the panel will expand, and you can adjust your profile. More about these settings can be found in the **“Set your profile”** file, lesson number 1.

The **Notification button** will be important to you only if you enable for the system to send Notifications (Adjust it in your *Profile Settings/Preferences, Notification Settings* section). You could receive notifications about tasks, approvals, etc., related to Your work.

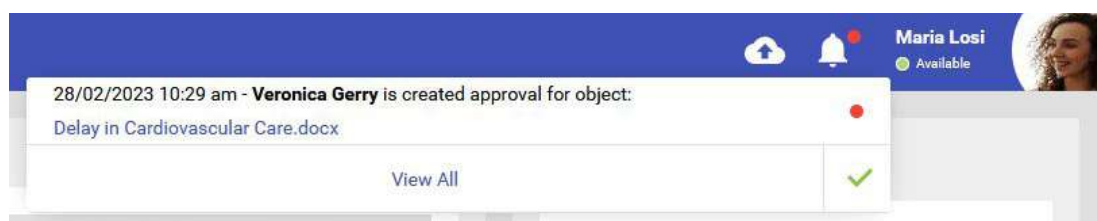
Let me show you an example of how notifications can be very useful to you:

When your colleague sends a document for approval to you, the Notification icon will get a red dot that indicates you got a new assignment.

The Approvals tab will also get a red dot because your notification is about an approval. So you will be instantly informed about any new assignment or task that is related to your work.



Click on the notification button, and the assignment will pop up. You can always check all notifications by clicking the Notification button and selecting “View All”. For more information about notifications, check here: <https://documentation.qmswrapper.com/content/dashboard>.



On the left side, there is the **Toggle Sidebar** with all important buttons. If you click on the sandwich icon (top left corner), the Toggle Sidebar will expand, and you can read all the names of the icons.

The icons on the sidebar are: **Dashboard, Conversation, Project, Qms, Risk, Traceability matrix, Calendar, To-Do List, Storage, Quality Systems Manual and GAP Report, Report, Settings, Quick Access Buttons, and Help and Support.**

Dashboard

As we already mentioned, the Dashboard is the page that will present all events related to your work. We divided the Dashboard into three parts (panels):

1. **First (Main) panel**
2. **Second panel - top-right**
3. **Third panel - bottom-right**

The screenshot displays the QMS Wrapper Dashboard interface. The top navigation bar includes the 'wrapper' logo, a 'Back' button, and user information for 'Maria Losi'. The main content area is divided into three panels:

- Panel 1 (Main):** A task list table with columns for List Type, Subject, Task Type, Status, Source Process, QMS Tags, QMS Type, Project, and Due Date. It includes filters for 'Assigned to Me' and 'Subject', and a 'Filter' button. The table shows 11 items, including tasks like 'Remove work instruction from web - old' and 'Fill up the form'.
- Panel 2 (Top-right):** A 'Details' panel for a selected task, showing fields for Project (Cybersecurity), Type (Task), Status (New), Priority (Low), Creator (Maria Losi), Assignee (Maria Losi), Start date, Due date, and % done.
- Panel 3 (Bottom-right):** A 'Conversations' panel showing a list of conversations, including 'Definition discussion', 'Supplier decision', and 'Supplier visit', with a profile picture for 'Veronica Gerry'.

The **First (Main) panel** contains 3 tabs:

1. **Tasks** - All tasks related to you (Assigned to Me, Created by Me, Following, and QMS Pending).
2. **Approvals** - Approvals waiting for you.
3. **Forms** - All completed forms within the company.

If you got a new assignment from your colleague, you will get a notification, and the task will be presented on the Dashboard under the **Task tab**. You can click on that task, and the task will open in the project in which it was created. So you can immediately start solving the task.

All about **Tasks tab**, check [How to Documentation-Tasks tab](#).

In the **Approvals tab**, you will receive files (documents), processes, or forms to approve or decline, so you will need to check them first and then decide if it is for **approve**, **decline**, or you want to **re-assign** the file.

Let me show how this works through an example:

You received a document for approval, click on the Approvals tab, and check the document. To check, you will have to click on the **eye icon** to “Preview file,” or if you want to download or check other information, click on the **three dots** and choose the desired option. After checking the file, you will need to make your decision: approve or decline. Use your electronic signature to make the decision and don't forget to explain your choice in the “Comments” section. To preview a process that was sent for an approval click on the three dots then click **“Reveal in Process Viewer”**, this will open the Process Engine where you can check the complete process.



All about **Approvals tab**, check [How to Documentation-Approvals tab](#).

Why we need to approve processes and forms?

It is an **FDA and ISO standard requirement to approve processes** that are applicable for your company. This is mainly the QMS Manager's job, and it is an ongoing job, the SOP's /Processes have to be periodically reviewed and approved as a proof that the processes were tailored to the company need and proof that they are effective and helping the company to maintain good QMS and strive for always enhancing the QMS System.

In Wrapper the procedure for approving is as follows:

you create a process/form, send it for approval, and Set as Active.

Also, don't forget to set **Expiry date** when you send it for approval, because that way the system will send reminder notifications to you when

the expiration day is getting close. The goal is to have your processes up to date all the time, **never to have an obsolete approval** on any of your active process.

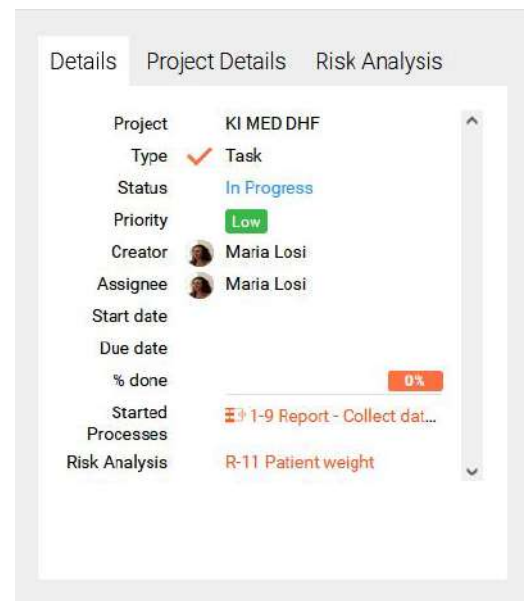
The third tab in the main panel is the **“Forms” tab**, where you can track all forms within the company. When a form is submitted, it will appear here. You can easily filter submitted forms by template and export all results. For example, if you have a form titled “Software Bugs” that everyone uses to report issues, developers can filter by this template and export all bug reports that need to be addressed.

All about **Forms tab**, check [How to Documentation-Forms tab](#).

Continuing with the Dashboard layout:
On the right side, we have 2 smaller panels.

The **Second panel** will show you **Details, Project details and Risk Analysis details** of the selected task. They will display information only if you select a specific task, file, or form.

If you have initiated a process or identified a risk based on a task or form, you can find that information in the **Details** tab, while the specifics of the risk will be displayed in the Risk Analysis tab. The Project Details tab displays information only for projects where tasks have been created. These three panels provide useful and convenient connections, making everything easily trackable and interconnected.



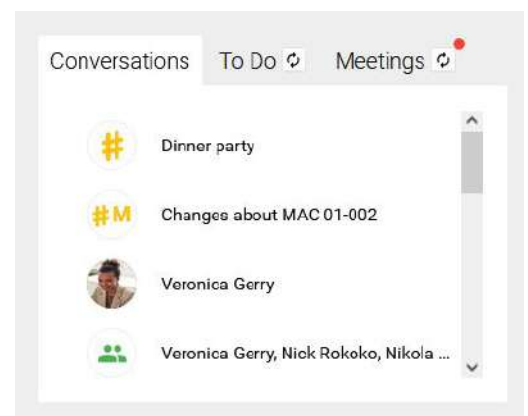
All about **Second panel**, check [How to Documentation-Second Panel](#).

Third panel has 3 tabs: **Conversations, To Do, and Meetings**.

The latest conversation from the **Conversation** module will be displayed in this tab.

Quick **To-do tasks** are also shown here, and you can complete them by checking the box.

In the **Meetings tab**, tasks (meetings) will



appear 7 days before the scheduled meeting, and you can start the meeting directly from this tab.

All about **Third panel**, check [How to Documentation-Third Panel](#).

Let's not forget the **Quick Access Buttons (3-dots)**, which provide all the essential tools for faster work in qmsWrapper. You don't need to leave the dashboard to start a process, fill out a form, create a task, or track meetings and QMS-related events. Even if you're not a QMS manager, these features make it easy to record all events and documents related to your job.



Start exploring, check [How to Documentation-Quick Access Buttons](#).

For further information please contact our HelpDesk Team at: **contact@qmswrapper.com**

Best regards,
The qmsWrapper Helpdesk Team