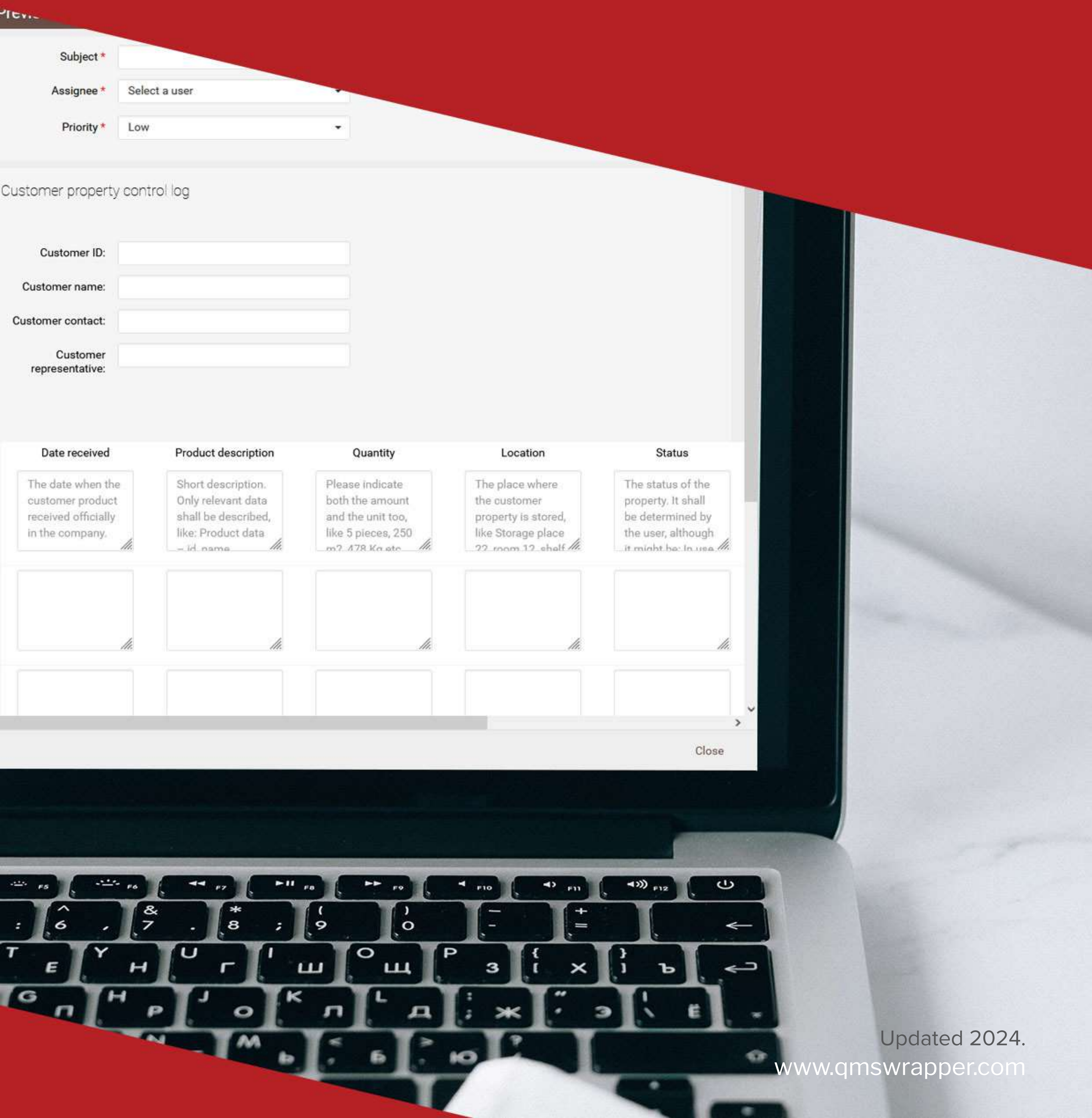
Forms in qmsWrapper

Best Practices



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Forms in qmsWrapper

What is a Form?

A form is a structured interface used for collecting, organizing, and processing data. It consists of predefined input fields and placeholders designed to capture specific information efficiently and accurately.

In our system, you can create your forms according to your company's needs.

We offer two types of forms:
- **Forms and**
- **Custom Tasks.**

The difference between these two is that forms are used as attachments in tasks and do not have an assignee (anyone can fill out the form without being assigned the task). Custom Tasks, on the other hand, are a type of task that you create (similar to our system tasks such as meetings, bugs, tasks, etc.). Custom Tasks must contain basic information: Assignee, Status, QMS, etc. These fields are automatically set when you start creating a Custom Task.

Common to both types of forms is the Report, which aims to compile collected data. Data gathered through these forms can be easily extracted into reports, facilitating analysis.

Further in the whitepaper, we will elaborate on how forms function and provide links where you can find additional useful information on this topic.

1. Forms

Forms within the system are treated like any other file.
Please note that we need to distinguish between

- **Form Templates** and
- **Filled Forms**.

Form Templates can be used multiple times, whereas Filled Forms are completed forms that behave like regular attachments, with entered data available for report preparation.

Form Templates can:

a) Be added to any task as an attachment (accessible via the 'Add Form Template' button in tasks),

b) Serve as attachments to process steps,

c) Be categorized under various QMS types (such as CAPA, Nonconformity, Training, Change, Feedback, and Supplier),

d) Can be filled from:

  a) From dashboard,

  b) Quick Access Buttons,

  c) Task (as an added template in the attachment),

  d) Storage (in specific Project).

Filled Forms can:

a) Be added to any task as an attachment (accessible via the 'Add Attachment' button in tasks),

b) Be stored within the system's storage facilities,

  a) By default, they are stored in Storage/Project/forms,

  b) Or within a task, if they are specifically linked to that task.

c) Be integrated into approval workflows,

d) Processes can be initiated based on filled forms,

e) Risks can be assessed based on filled forms,

f) Be monitored through the Form dashboard for tracking and management,

g) Easily be extracted and exported to Excel for reporting purposes.

2.Custom Task

Custom Tasks are a type of Tasks therefore they are treated as Tasks in the system.

They were introduced to provide additional task options when the standard ones (Bug, Task, Feature, Meeting, Milestone, To Do, Decision) are insufficient for your company's needs. Custom Tasks require an Assignee and other necessary fields.

Custom tasks:

a) Can be created individually as tasks within your project and assigned to colleagues.

b) Can function as steps within a process.

c) Can be categorized under various QMS types (such as CAPA, Nonconformity, Training, Change, Feedback, and Supplier).

d) Can be easily extracted and exported to Excel for reporting purposes.

How to create Forms:

Create forms: https://documentation.qmswrapper.com/content/create-custom-task-or-form

There are 4 types of Form elements: Basic, List, Special, and Layout, below are the links how to use them:

a) Basic: https://documentation.qmswrapper.com/content/how-use-basic-components

b) List: https://documentation.qmswrapper.com/content/how-use-list-components

c) Special: https://documentation.qmswrapper.com/content/how-use-special-components

d) Layout: https://documentation.qmswrapper.com/content/how-use-layout-components

A short explanation on editing the components: https://documentation.qmswrapper.com/content/editing-form-editor-components

How can I use Forms?

Forms can be used after they are **Approved** by an authorized user through the appropriate approval workflow and set as **Active**.

As we already mention, Form can be filled from:

a) From dashboard,

b) Quick Access Buttons,

c) Task (as an added template in the attachment),

d) Storage (in specific Project).

From Form dashboard, you can fill up any form - List of Form templates will show up all QMS and Project based form templates.
Form dashboard shows the list of all filled forms in the company.
Button “Form” from Quick Access Buttons also shows all Form Templates.
From CAPA Dashboard, you could track and fill up just CAPA type forms. This rule applies to all other QMS Dashboards.
From Storage, you can fill up any of the Form template (QMS or Non-QMS related).
In task, you can attach any Approved and Active Form template.

Edit form: https://documentation.qmswrapper.com/content/edit-form-or-custom-task

How to use forms and how to export collected data into Excel (Reports Module): https://documentation.qmswrapper.com/content/how-use-forms

How can I use Custom Task?

Custom Tasks are used as custom-made Tasks instead of the system in-built tasks type. Like all forms, they need to be **Approved** and set as **Active** before use.

When the Form is ready for use, go to Project where you want to create the Task, and click the “+ Create Task”, and choose the “Custom Task“. A list will come up, find your form in the list and click “Start”.

* Remember to include ‘Custom Task’ as one of the ‘Task Types’ associated with your project. You can set it up in Project Settings > Task Types.

Forms Report

Form reports can be checked and exported through the following options:

1. Dashboard > Forms
2. QMS-type forms can be accessed via the QMS Dashboard > Forms
3. Reports module > Forms menu

Custom Task Report

Custom Task reports can be checked and exported through the following options:

1. Dashboard > Tasks
2. QMS-type tasks can be accessed via the QMS Dashboard > Tasks
3. Report module > Tasks

For any further information please contact the qmsWrapper Helpdesk team at: contact@qmswrapper.com.

Best regards,
The qmsWrapper Helpdesk Team