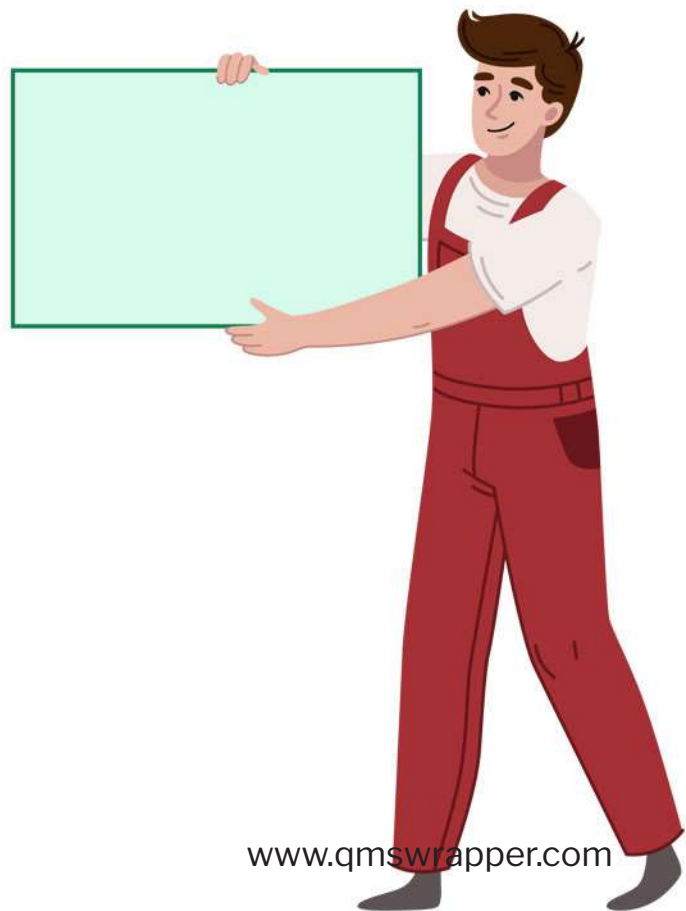
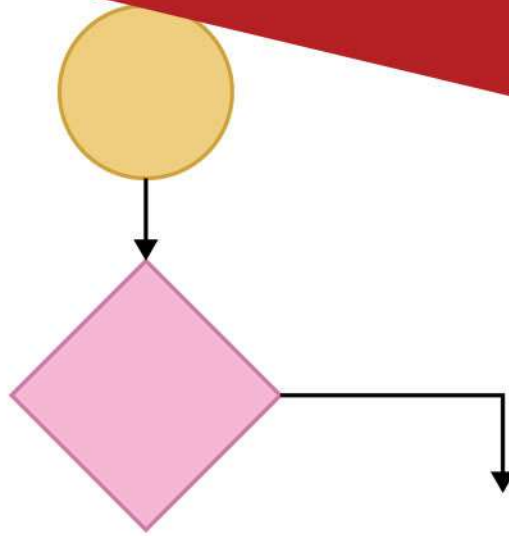


# qmsWrapper Process Engine: A Comprehensive Guide

*Learn how to create and manage processes, track progress,  
and choose the right task types.*

Subject: Prepare work instruction  
Assignee: Brandon Flores  
Priority: Low  
Status: New  
qms Tag Field:  
Done %:



# Process Engine

**QMS standards** are based on the **process approach** meaning that any activity that receives **input** and converts it to **output** can be considered as a **process**.

There are many ways to **describe the process approach**:

A process is a set of interrelated activities that use resources (people, machines, etc.). If you look at it closely, every organization is made up of a series of interacting processes. For a company to function effectively, it should identify and manage linked processes (nonconformity reporting, CAPA, audit management, etc.).

So, **systems consist of processes**, and **processes are made up of tasks**. When planning and implementing a QMS, this hierarchy of systems, processes, and tasks is important to help deploy an effective and compliant QMS. But it can easily become a complex system with way too many processes, that's why qmsWrapper has the option to use **diagrams/flowcharts** to allow you to better visualize the input-output relationship.

A **flowchart** is seen as a diagram that is used to represent a **workflow**, process, or system. It shows the individual process steps or activities. qmsWrapper uses them to give an easy-to-understand overview of complex workflows and their interrelation of activities.

**qmsWrapper is built to support the process approach**. It comes with **already-included processes** that address QMS requirements. Therefore, processes are defined through flowcharts as the sequence of tasks or templates can be assigned to specific users.

We like to say that **processes implement SOPs through a series of events in a sequence where one triggers another assuring nothing is left behind**. Workflow processes define the steps needed to complete a set of Quality requirement tasks – without missing a step.

## So, how does it work in qmsWrapper?

By **creating a new process** (*Settings/Processes, Create New Process*), you will give a name to your event or process, describe it, choose a process category (not required), and QMS type (if it will be QMS-related). As one of the auxiliary options, there is also a field for tags. Upon clicking the “Create” button, the **process editor** will be opened, allowing you to **generate and arrange steps** in any way you desire. You can use different **actions** and **triggers** to create a process to suit your requirements, ranging from “start” to “end” elements.

### ***Why we need elements, actions and triggers?***

To maintain the flow of the process, all elements, actions, and steps are connected by triggers, implying that one step should activate another.

### ***How to start?***

Start from the “Start” (click on the “Start” circle) and choose the Trigger button on the left side.

Choose your **first step/first action in your process**:

- 1) **Create Task** – to create a new task (task, meeting, custom form, to-do, QMS Event, Decision, etc.)
- 2) **Attachment approval** – choose the workflow and create a decision (a decision is an issue where you have to add an attachment that needs to be approved). First, **attachments must be approved by the chosen approval workflow**, and then the **issue assignee must confirm and make the final approval to the Decision**.
- 3) **Start Process** – to start the already created process as the first step.

After that, select the action and create the **trigger**. Choose **triggers and actions** until you are finished.

## Here are some advanced actions explained:

1) **Create Join Task** – With the help of this actions users can collect multiple single tasks in a group and use the group as a step in a process.

**Example:** We have created 3 different tasks - tests for 3 colleagues, first we want to collect the populated tests from all 3 colleagues, then review the answers.

To be able to do this create the Join Task after the first task – test. For other 2 tasks, you just have to add **“Connect to Join Task”**, and all the 3 tasks will be joined.

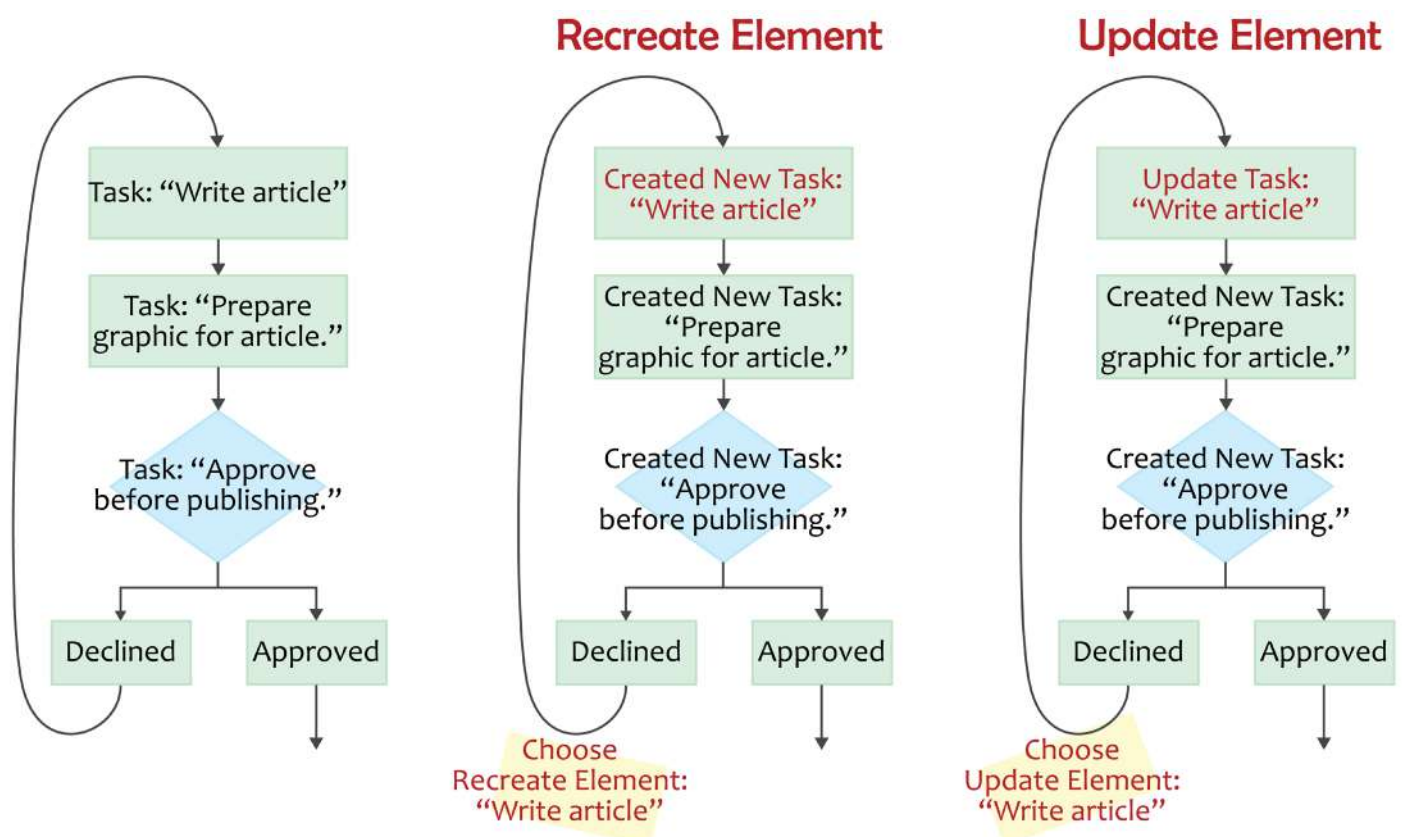
2) **Connect to Join Task** – If you already created Join Task, you need to connect at least one task to the Join Task. Previously explained.

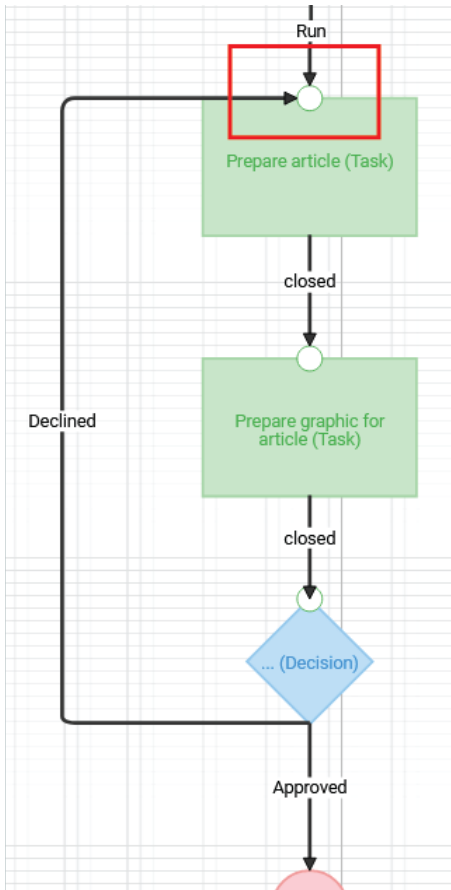
If you use Join Task, you need to “Join” tasks or you will get this error message when you want to save the process: **“Diagram contains join Tasks with single parent, please fix diagram”**.

3) **Update Task** – Update already created Task. This action can be used for example after a decision is Declined, it will loop back to the step you define, and it will send the task again to the assignee for modification.

4) **Recreate Element** – This action recreates the element you previously created in your diagram, after choosing any of the steps the action will create the new task.

To better understand the difference between Recreating an element and Updating an element please check the graphic below:

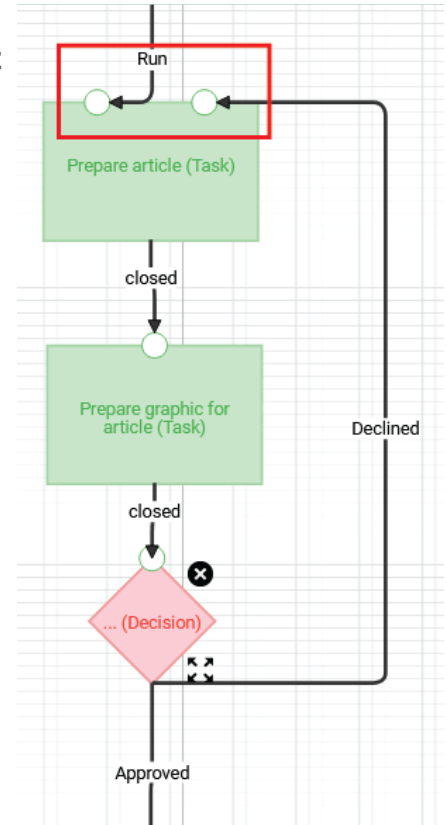




### Recreate element

in process will be shown like on this picture, because it will create complete new Task.

**Updated element**  
in process will be shown like on this picture, because it will Update task, not create new task.



### Task types:

**1) Decision** - This action will require the assignee to complete the decision with a “Yes” – “No”, or “Approved” – “Declined”. After creating this step you can continue with adding triggers for both situations.

The “Decision” can be a non QMS related task.

**2) QMS Decision** – This Decision is QMS related, it works the same as the previously explained “Decision” action.

**3) QMS Event** – This action sends notifications to the assigned users. You can use it for example at the end of a process, as a last step to send a notification to the relevant people (for example to the CEO) that the (for example Training of the developers staff) process was successfully finished. The assignee will get a notification with the description where the assignee would have to click the “Finish” button as an acknowledgement of the completed process, and the Event will be closed.

The rest of the Task types should be already familiar from the Projects module lesson: **Bug, Task, Feature, Meeting, To Do, and Custom Task**.

### Take Away about the Process Engine:

- Any **process** can be **QMS or Project** related.
- Any **step** in the process can be **QMS or Project** related (flowchart has 2 sides: QMS and Project for better preview).
- You can create **simple or very complicated processes**.
- Use already created **templates** and adapt them to your needs.
- Each process has to be **approved** by the responsible person before use, and set to **“Active”**.
- Use **Process categories** to better organize your processes. Create your own categories if needed.
- Process save the **Version history** and **Approval history** in Details section.
- QMS related processes can be different types: **CAPA, Nonconformity, Training, Change, Feedback, and Supplier**. If you don't want to use any of these types, choose **General QMS** type.
- All QMS types have their own dashboards (**Quick Access Buttons**). You can manage QMS related processes through those dashboards.
- **Track started processes** through **Project or QMS module**.

### Process: P-622-B Competence training and awareness - 2nd training

#### Process steps



#### Step 1

##### P-622-B Competence training and awareness Process Initiated

Assignee: *QMS manager*

Created: 22/10/2021 11:46 am

Status: *New*



##### Prepare Action plan for training

Assignee: *HR manager*

Created: 22/10/2021 11:46 am

Status: *Closed*



#### Step 2

##### Measure effectiveness of training



Assignee: *Unit manager*

Created: 25/05/2022 12:56 pm

Status: *New*



#### Details

Type		Process
Started by		Maria Losi
Started at		22/10/2021 11:46 am
Status		In Progress

## Now, let's explain how we record the processes

All initiated processes can be tracked in the **QMS module/Started Processes**.

If you want to track processes **by project**, **project-related processes** will appear only in the Project module, while **QMS processes** will be found in the QMS module under **Projects/Started Processes**.

For more details or personalized assistance please contact our team, we will be happy to help: [contact@qmswrapper.com](mailto:contact@qmswrapper.com)

Best regards,  
The qmsWrapper HelpDesk Team