TEAM Software by WORKWAVE

How to Set Up a QA Template

TEMPLACMS

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COMMERCIAL STATEMENT

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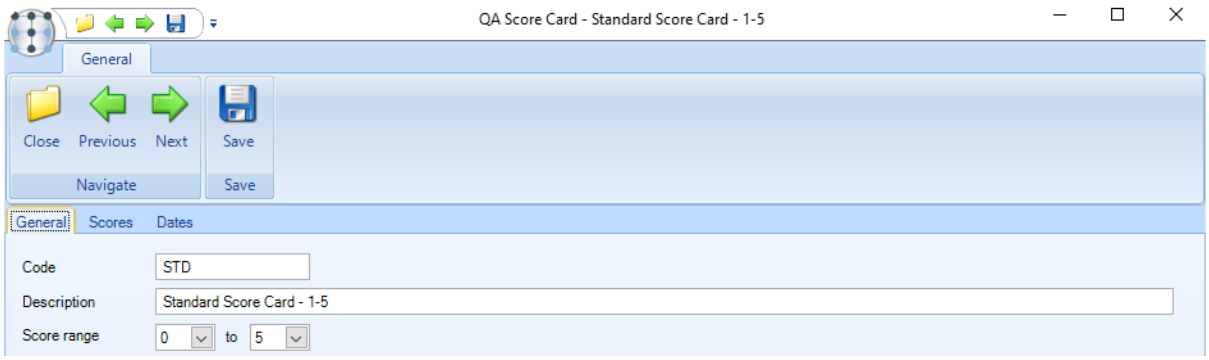
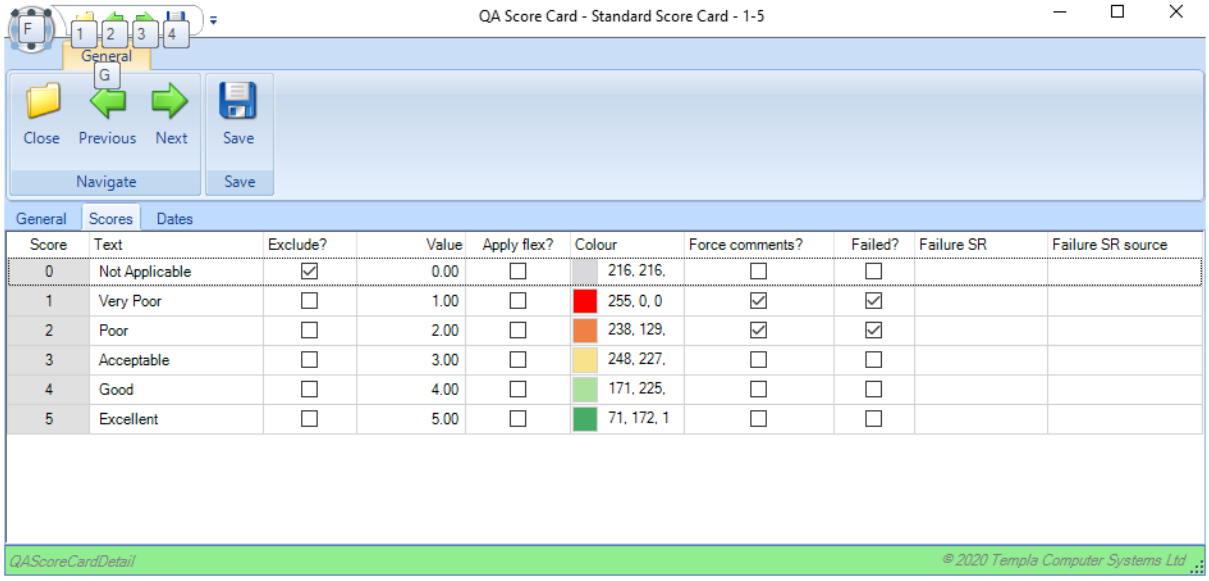
STEP 1: SETUP NEW QA SCORECARD

> **NB: only required if a specific client demands that they are scored differently or if audits are required for other purposes, e.g. H&S (QAL50), Cupboard Checks, etc.**

Add a new (or **Copy** an existing) **QA scorecard**



Enter/set relevant fields, i.e.: text, value, colours and failed status



Score	Text	Exclude?	Value	Apply flex?	Colour	Force comments?	Failed?	Failure SR	Failure SR source
0	Not Applicable	☑	0.00	☐	216, 216,	☐	☐		
1	Very Poor	☐	1.00	☐	255, 0, 0	☑	☑		
2	Poor	☐	2.00	☐	238, 129,	☑	☑		
3	Acceptable	☐	3.00	☐	248, 227,	☐	☐		
4	Good	☐	4.00	☐	171, 225,	☐	☐		
5	Excellent	☐	5.00	☐	71, 172, 1	☐	☐		

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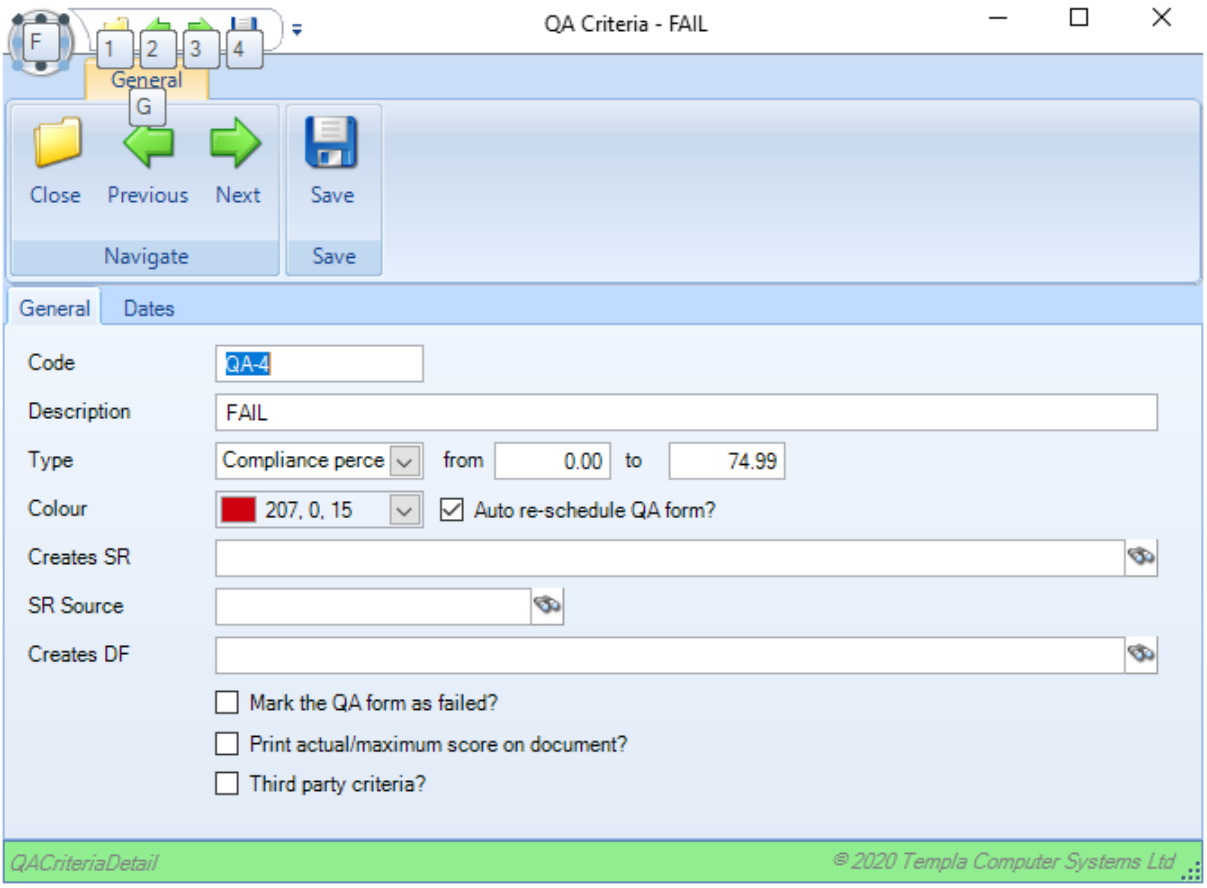
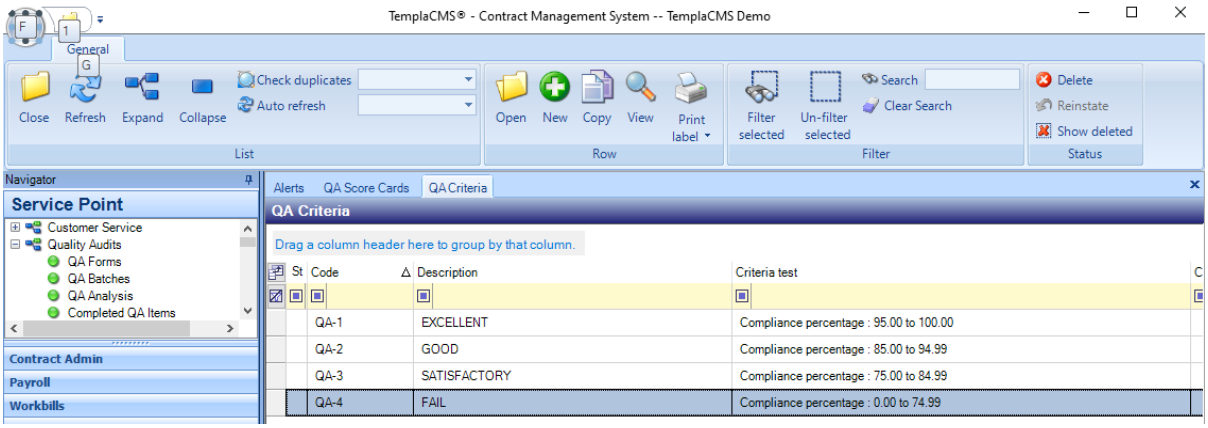
STEP 2: SETUP THE QA CRITERIA

> **NB: only required if a specific client demands that they are assessed differently**

Add each **QA criteria**, assigning the relevant type, e.g. compliance % range, plus for failure criteria considering the 'Auto-reschedule QA form?':



Add all other **QA criteria**, although once the first is created it's easier to copy



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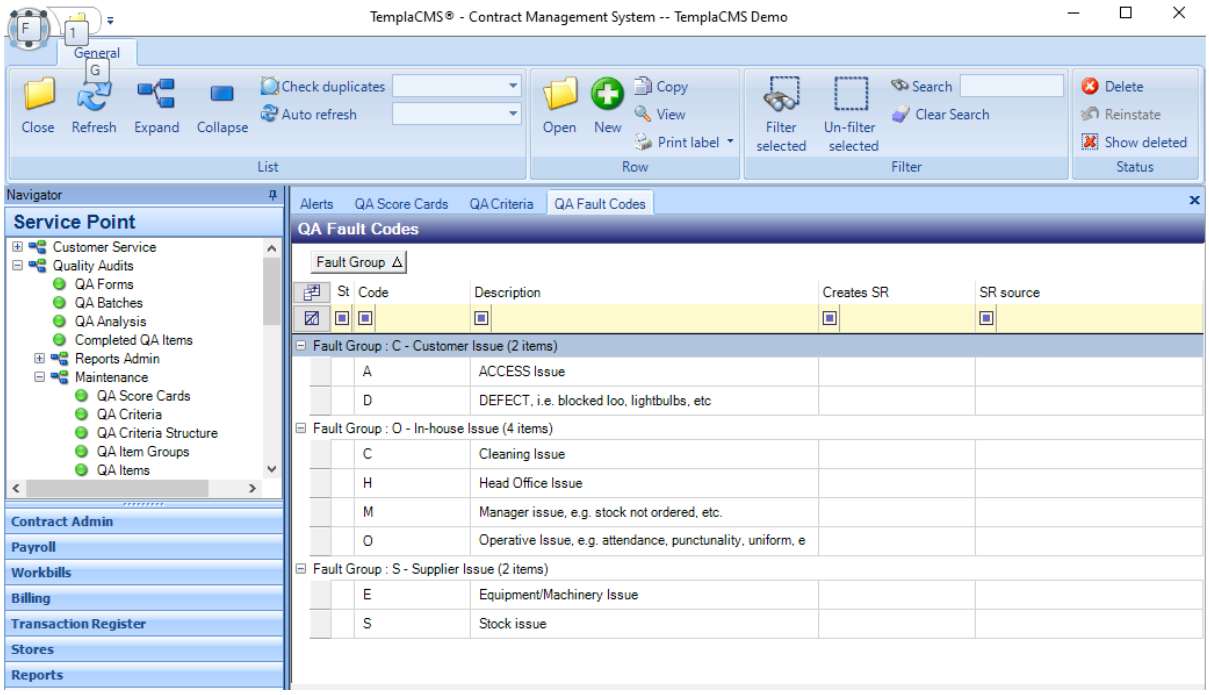
STEP 3: SETUP ANY FAULTS OR FAULT GROUPS

> **NB: check if any new fault codes need to be added; this may be required if Service Requests need to be created in certain circumstances for specific (new) faults**



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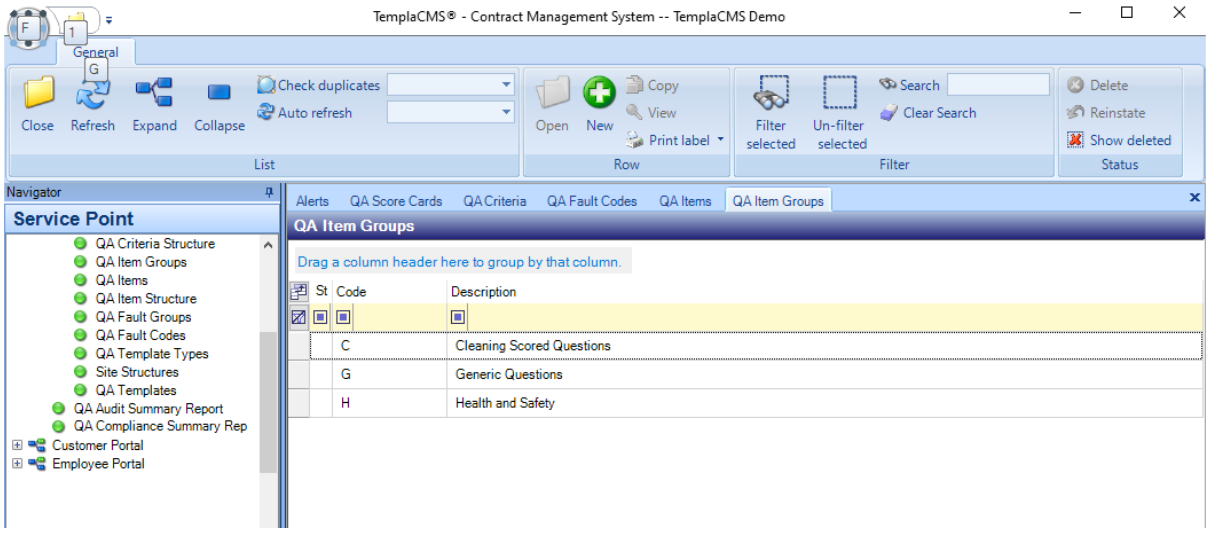
STEP 4: SETUP NEW QA ITEM GROUP

> **NB: only needed if the QA items are specific to this QA template or if reporting is potentially needed at QA item group level**



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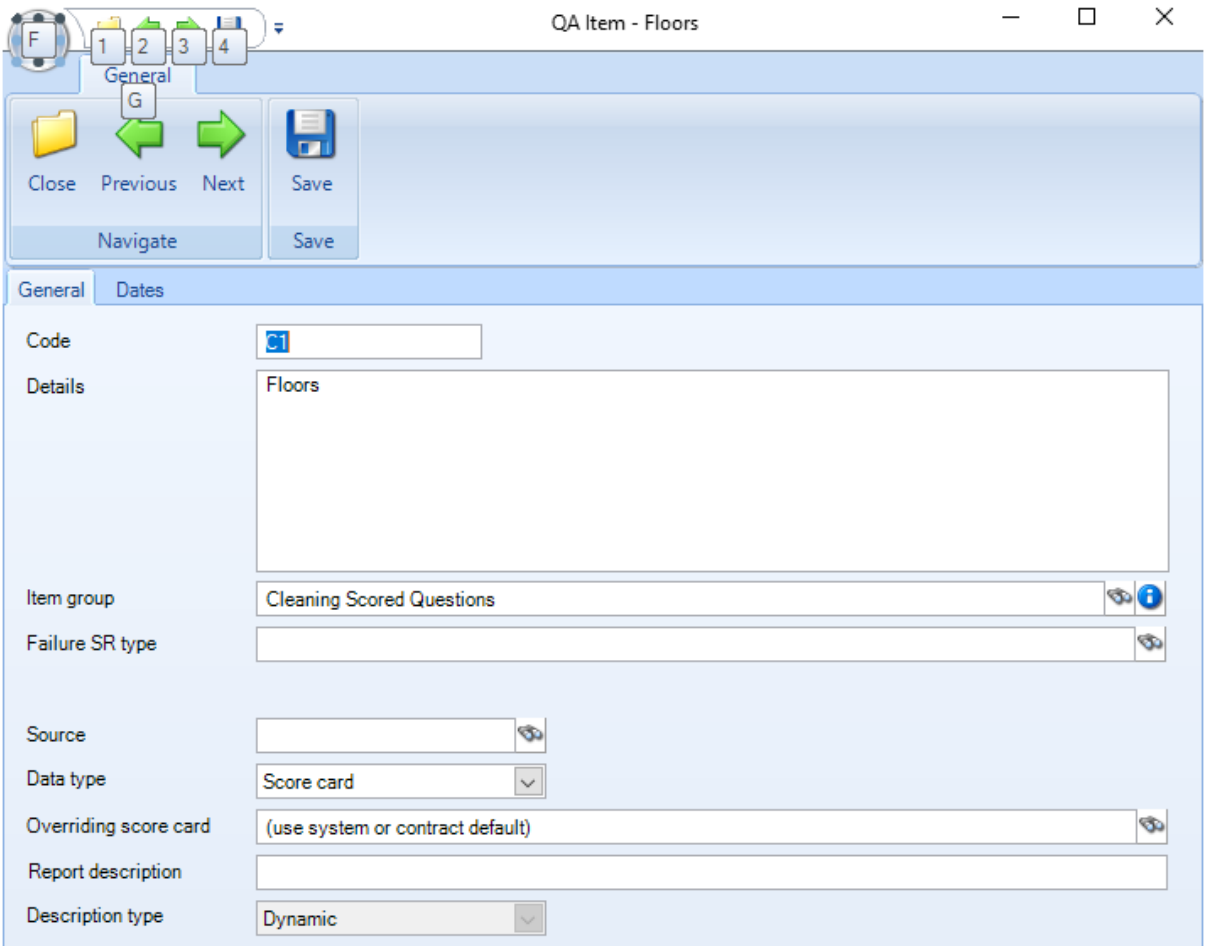
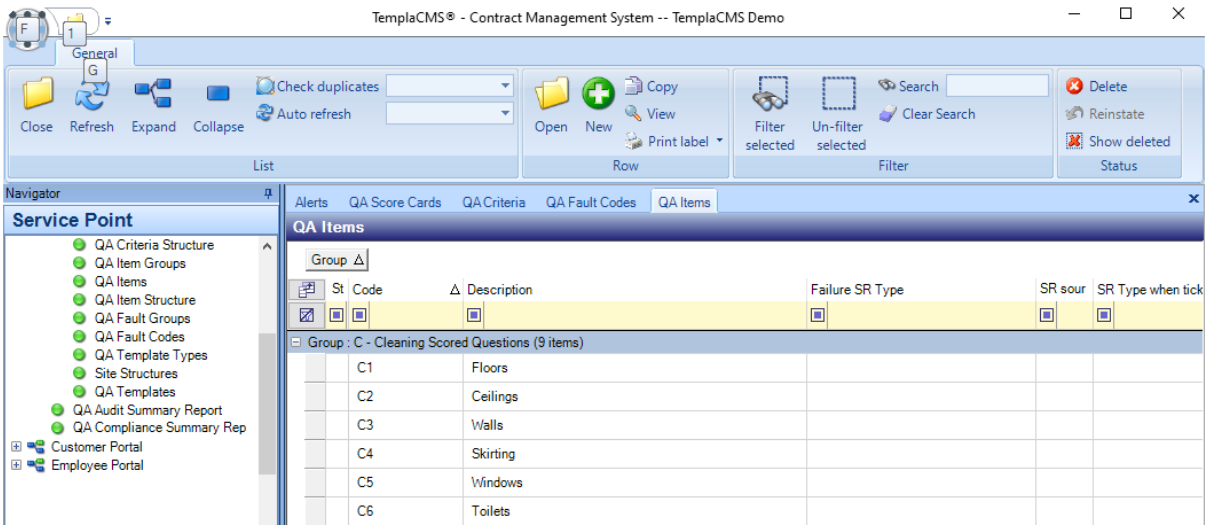
STEP 5: SETUP ALL THE NEW QA ITEMS, I.E. QUESTIONS

Setup all/any **QA items**, assigning each to the new **QA item group** and flagging with the relevant **data type**, i.e. scorecard if they are going to be scored:



Add all other **QA items**, although once the first is created it's easier to copy



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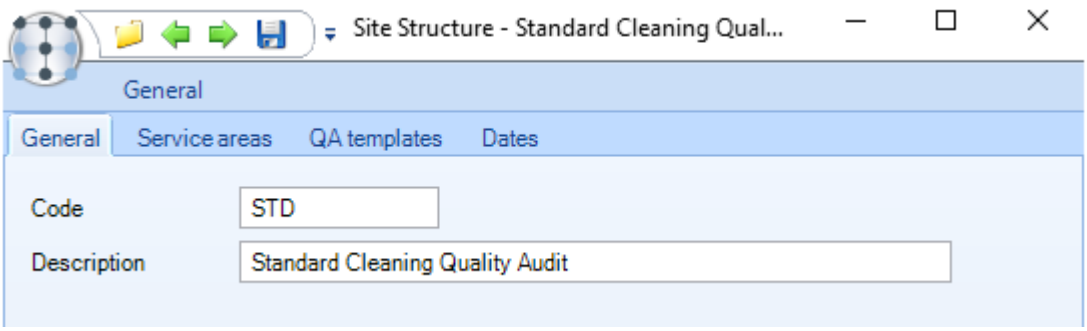
STEP 6: SETUP THE SITE STRUCTURE

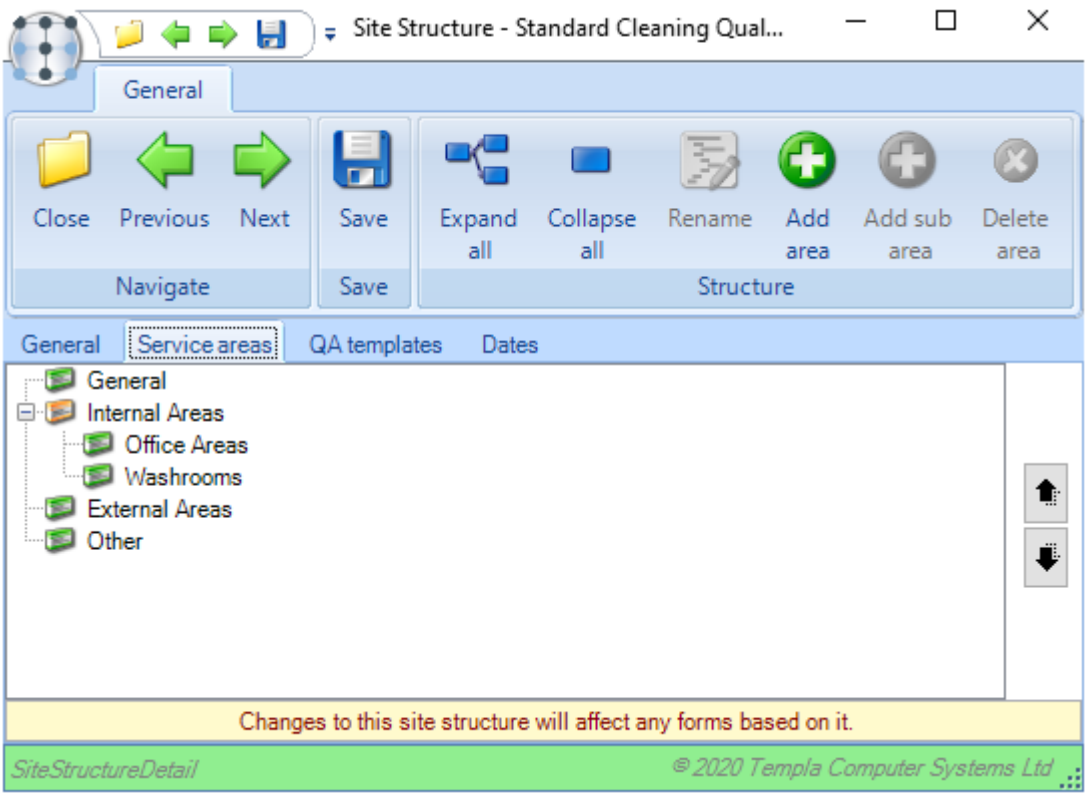
> **NB: for ease of maintenance, its best to have a new Site Structure for each QA template, although this is not strictly needed**

Add a new **Site Structure**



Add all the **QA areas** (and **QA sub-areas**) required

> **NB: changes to a "QA site structure" will affect QA templates (and thus QA forms) based on it, as per the note at the bottom of the screen below**



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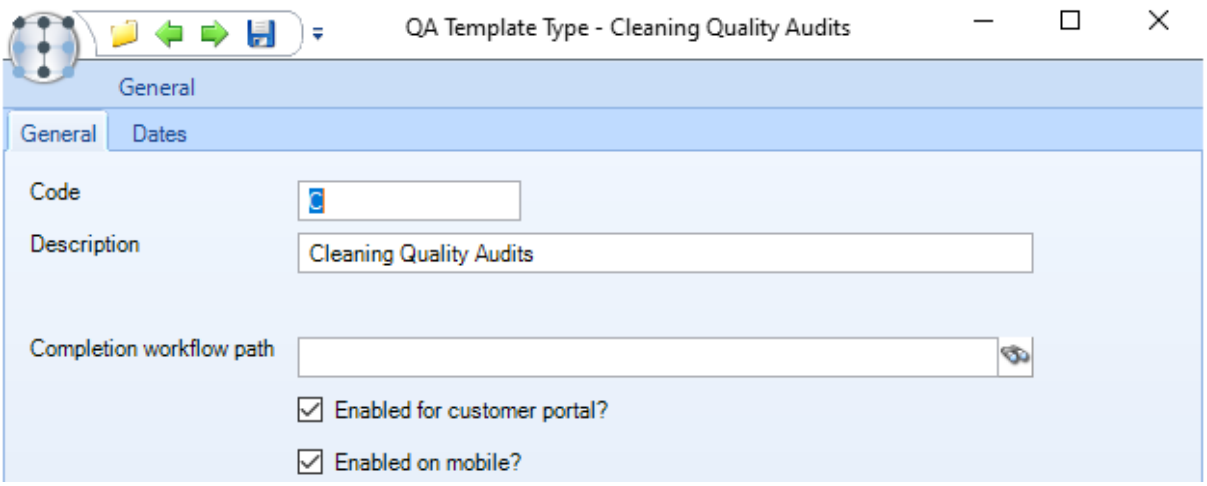
STEP 7: SETUP THE QA TEMPLATE TYPE

> **NB: only required if new QA template of a different type (e.g. H&S Audit, etc) and/or if a new QA template needs to be routed to a different QA workflow path.**



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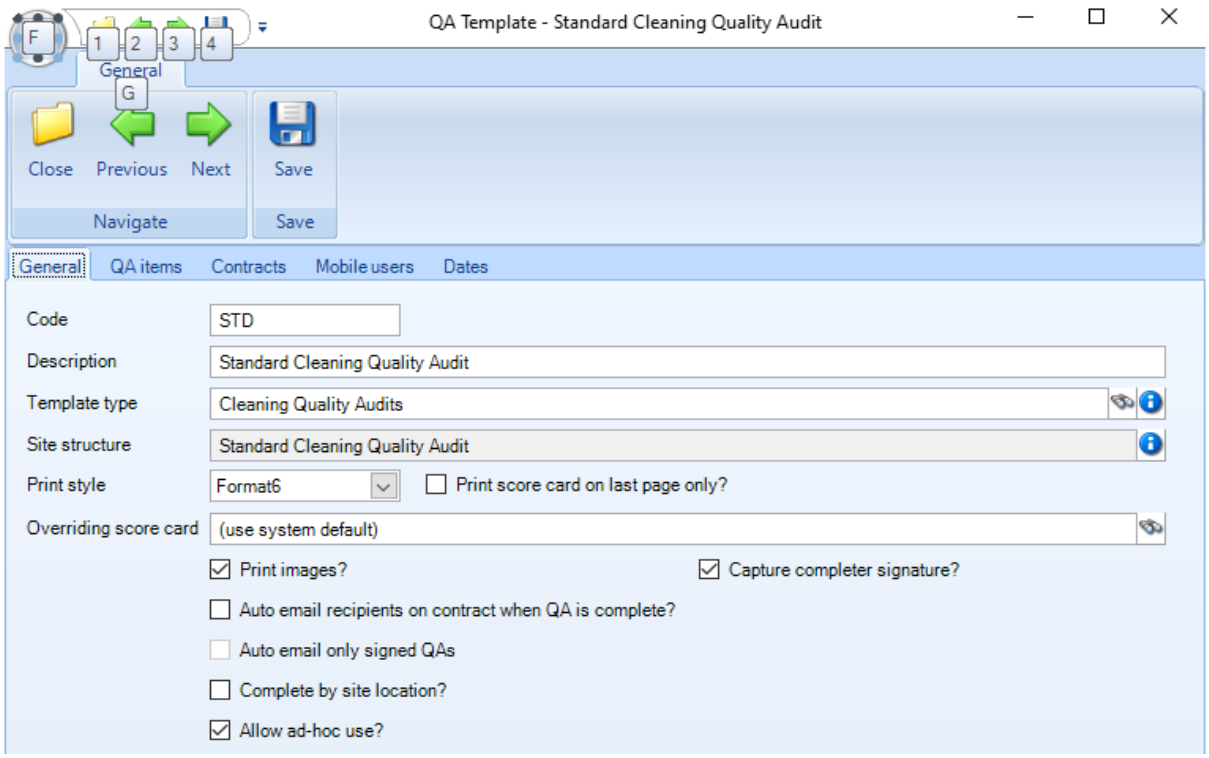
STEP 8: SETUP THE QA TEMPLATE

Part 1: Create a New QA Template

NB: flagging as '**Allow ad-hoc use?**' means the QA template can be used for one-off QA's on any site/contract, else, if not flagged this QA template has to be assigned to the contract as per **Step 9**; do not select 'Complete by Site location':



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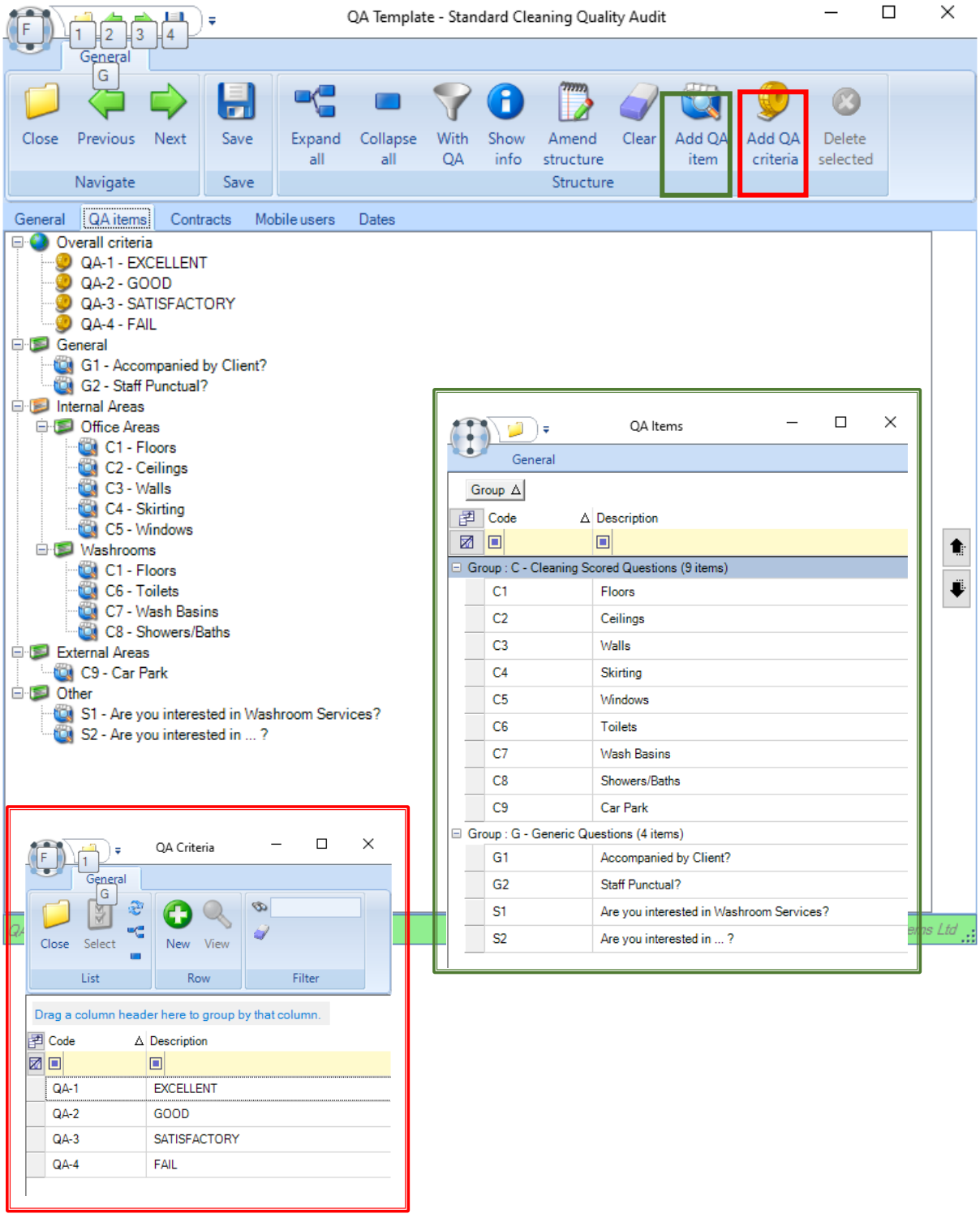
Part 2: Assign QA Criteria

Assign **QA Criteria** (mandatory at header level) to the 'Overall Criteria' level and **QA items** to each area/sub-area, as necessary:



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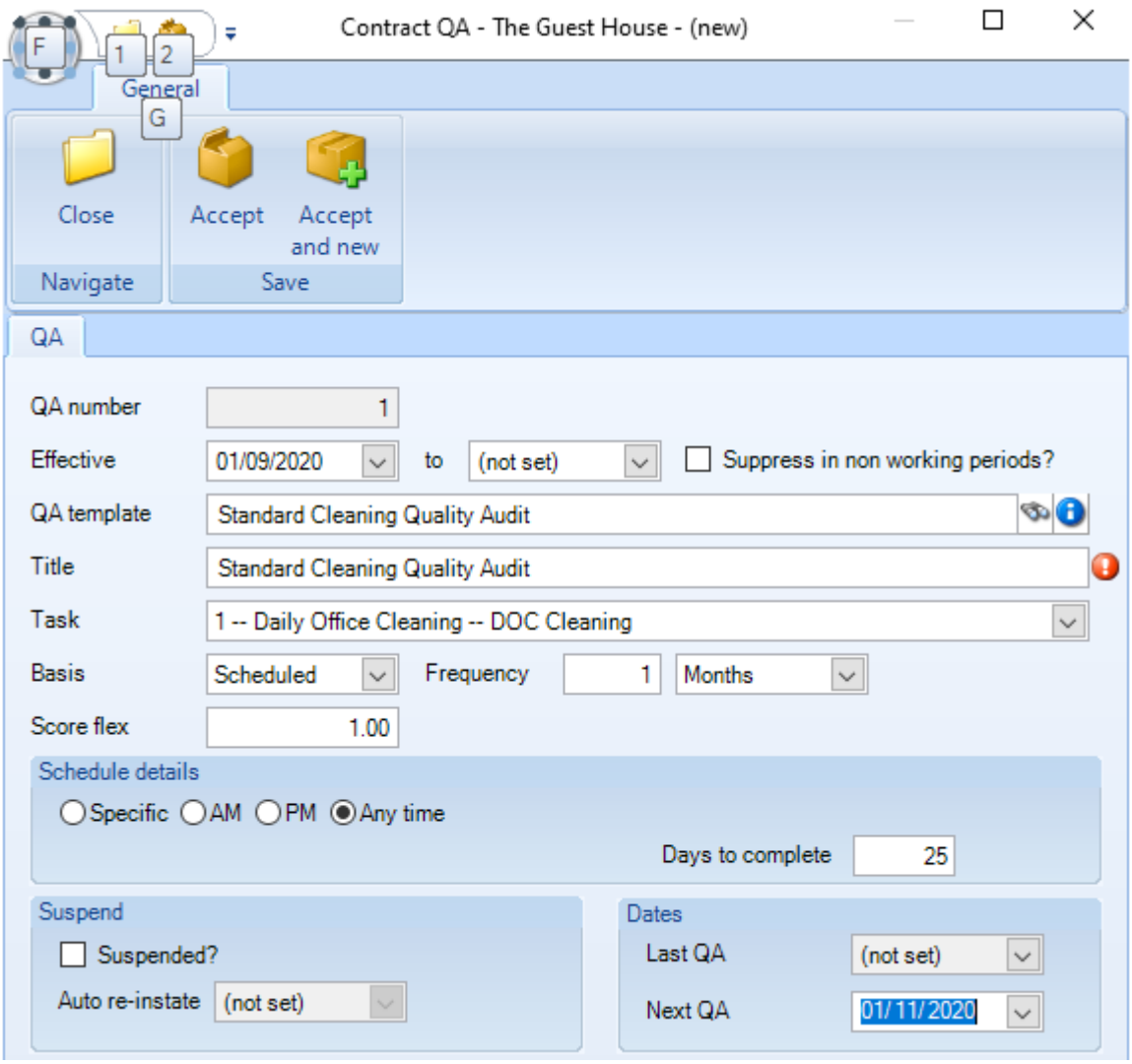
STEP 9: ASSIGN QA TEMPLATE TO CONTRACT

Find the contract, create a new version and add the **QA template** via the QA tab:



> **NB: set the 'Next QA date' to the first day of the period when the QA is due for the frequency selected, whereas the 'effective from' date can be left as defaulted.**

Also consider if 'QA recipients' or 'QA failure recipients' are required for the contract.

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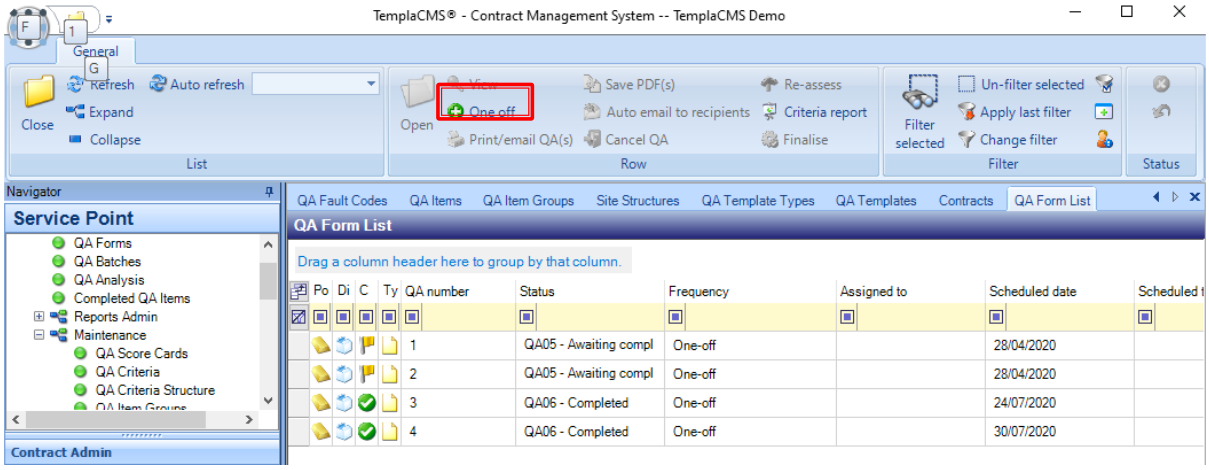
STEP 10: CREATE A QA FORM

Scheduled QA's

If QA templates are assigned to contracts as per **Step 9**, then a QA batch would be generated (via **QA Batches**) at the start of each month (or the end of the previous month) for the next month's QA's. On posting the QA batch and assuming that workflow has been setup for QA's then QA's would be assigned to managers to be completed (in the same way that timesheets are) and if managers have mobile devices, would be sent out to the mobile device. All QA's created via a QA batch appear on the QA forms list.

One-Off QA's

If QA templates are not assigned to contracts as per **Step 9** and are flagged as 'Allow Ad-hoc QA?' then a one-off QA form can be created from the QA Forms list for any site; alternatively, if QA templates are assigned to contracts as per **Step 9** and are flagged as 'Allow Ad-hoc QA?' then a one-off QA form can be created from the QA Forms list for just those sites the QA template has been assigned to.



NB: One-off QA's can also be created via the Templa Mobile app.

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