

# How to Set Up a QA Template

## TEMPLACMS

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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

QA Score Card - Standard Score Card - 1-5

General

Close Previous Next Save

Navigate Save

General Scores Dates

Code: STD

Description: Standard Score Card - 1-5

Score range: 0 to 5

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

QA Score Card - Standard Score Card - 1-5

General Scores Dates

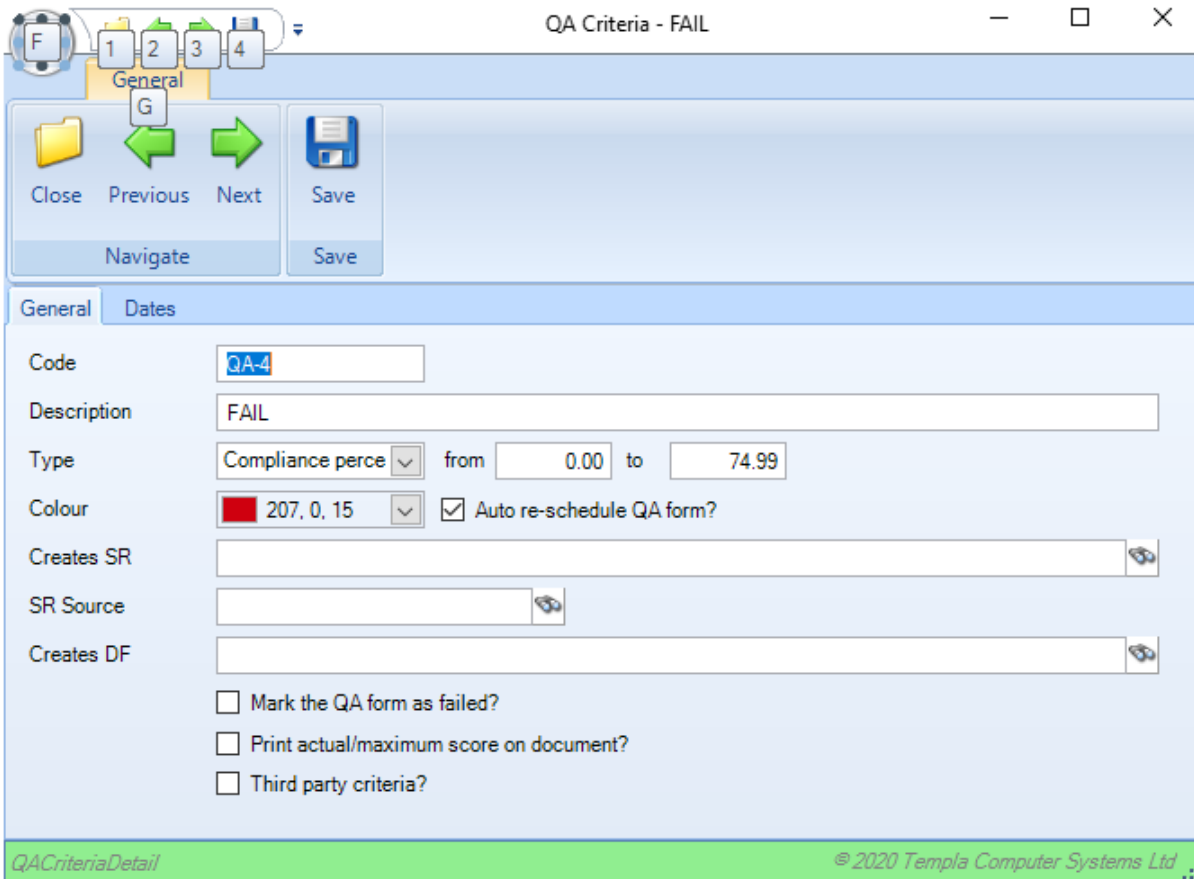
Score	Text	Exclude?	Value	Apply flex?	Colour	Force comments?	Failed?	Failure SR	Failure SR source
0	Not Applicable	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	216, 216,	<input type="checkbox"/>	<input type="checkbox"/>		
1	Very Poor	<input type="checkbox"/>	1.00	<input type="checkbox"/>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

QAScoreCardDetail © 2020 Templa Computer Systems Ltd

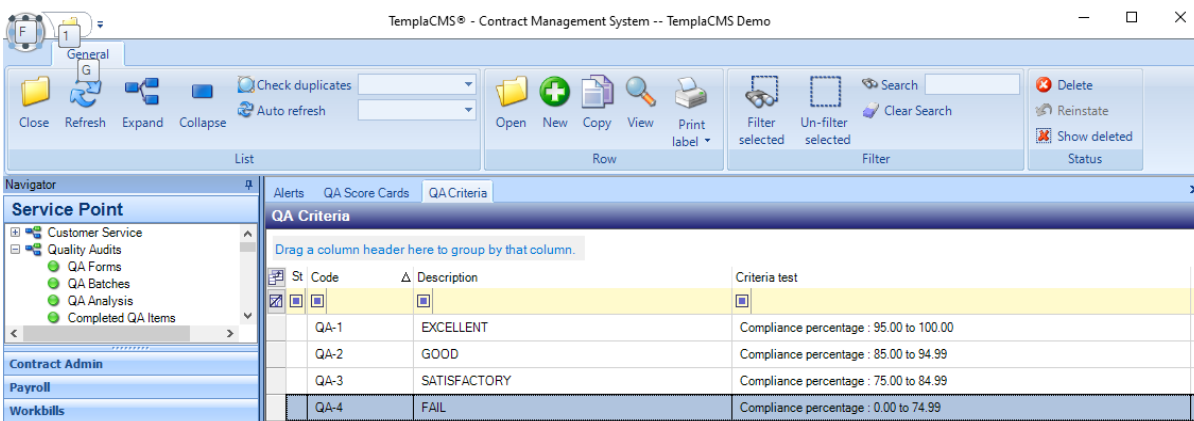
# STEP 2: SETUP THE QA CRITERIA

**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



# 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**

TemplaCMS® - Contract Management System -- TemplaCMS Demo

General

Close Refresh Expand Collapse Check duplicates Auto refresh Open New View Print label Filter Un-filter Search Clear Search Delete Reinststate Show deleted Status

Navigator

Service Point

- Customer Service
- Quality Audits
  - QA Forms
  - QA Batches
  - QA Analysis
  - Completed QA Items
- Reports Admin
- Maintenance
  - QA Score Cards
  - QA Criteria
  - QA Criteria Structure
  - QA Item Groups
  - QA Items

Contract Admin

Payroll

Workbills

Billing

Transaction Register

Stores

Reports

Alerts QA Score Cards QA Criteria QA Fault Codes

QA Fault Codes

Fault Group

St	Code	Description	Creates SR	SR source
Fault Group : C - Customer Issue (2 items)				
	A	ACCESS Issue		
	D	DEFECT, i.e. blocked loo, lightbulbs, etc		
Fault Group : O - In-house Issue (4 items)				
	C	Cleaning Issue		
	H	Head Office Issue		
	M	Manager issue, e.g. stock not ordered, etc.		
	O	Operative Issue, e.g. attendance, punctuality, uniform, e		
Fault Group : S - Supplier Issue (2 items)				
	E	Equipment/Machinery Issue		
	S	Stock issue		

# 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**

The screenshot shows the TemplaCMS interface for configuring QA Item Groups. The window title is "TemplaCMS® - Contract Management System -- TemplaCMS Demo". The interface includes a top toolbar with various actions like Close, Refresh, Expand, Collapse, Check duplicates, Auto refresh, Open, New, View, Print label, Filter, Un-filter, Search, Clear Search, Delete, Reinststate, and Show deleted Status. A left-hand "Navigator" pane shows a tree view under "Service Point" with items like QA Criteria Structure, QA Item Groups, QA Items, QA Item Structure, QA Fault Groups, QA Fault Codes, QA Template Types, Site Structures, QA Templates, QA Audit Summary Report, and QA Compliance Summary Rep. The main area is titled "QA Item Groups" and contains a table with columns "St Code" and "Description".

St Code	Description
C	Cleaning Scored Questions
G	Generic Questions
H	Health and Safety

# 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:

QA Item - Floors

General

Code: F

Details: Floors

Item group: Cleaning Scored Questions

Data type: Score card

Description type: Dynamic

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

TemplaCMS® - Contract Management System -- TemplaCMS Demo

QA Items

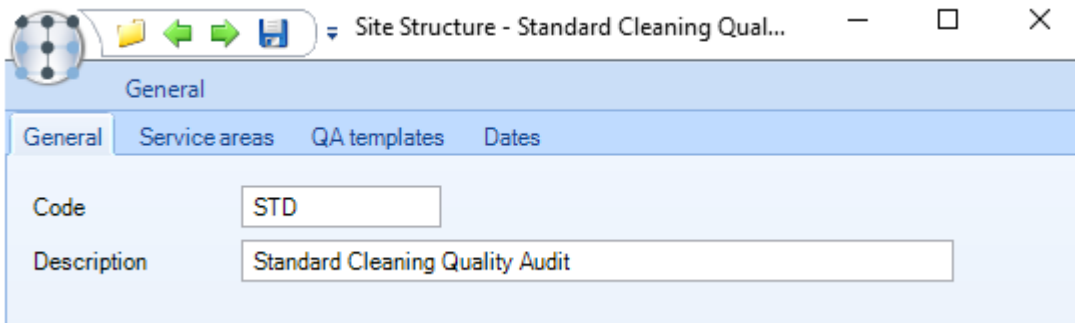
St	Code	Description	Failure SR Type	SR sour	SR Type when tick
	C1	Floors			
	C2	Ceilings			
	C3	Walls			
	C4	Skirting			
	C5	Windows			
	C6	Toilets			



# STEP 6: SETUP THE SITE STRUCTURE

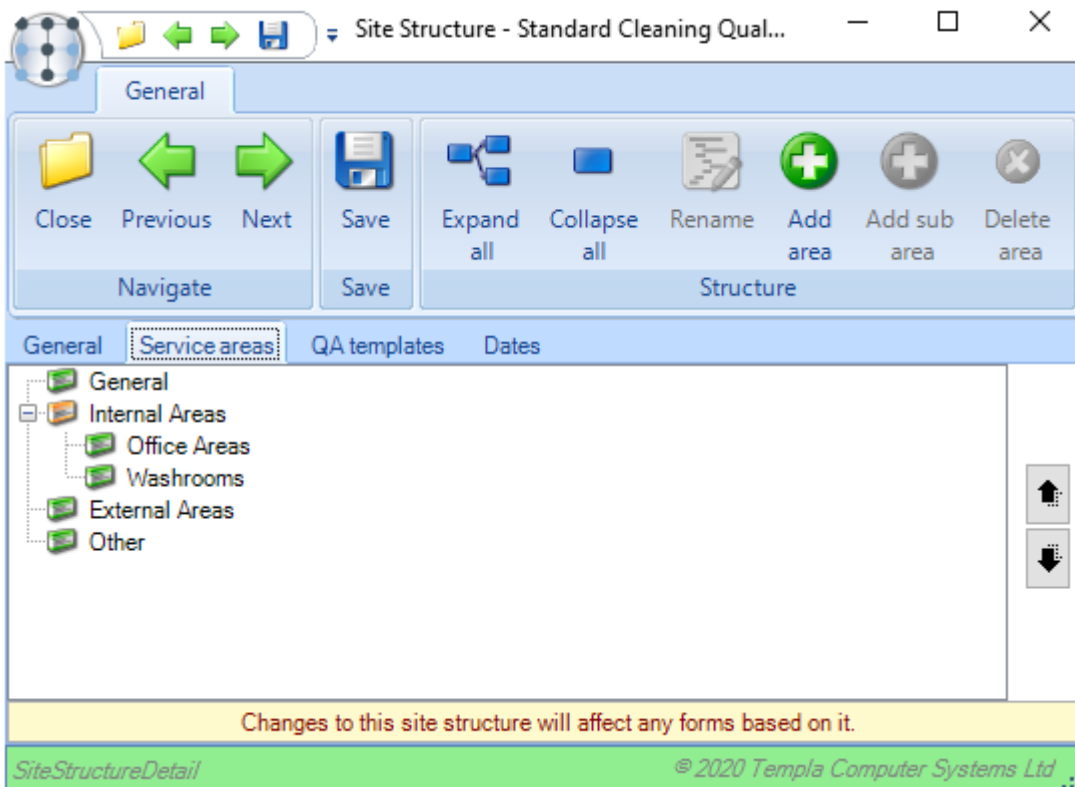
**NB:** for ease of maintenance, its best to have a new Site Structure for each QA template, although this is not strictly needed

## 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



# 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.

QA Template Type - Cleaning Quality Audits

General

General Dates

Code

Description

Completion workflow path

Enabled for customer portal?

Enabled on mobile?

# 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’:

The screenshot shows the 'QA Template - Standard Cleaning Quality Audit' configuration window. The 'General' tab is active, displaying the following settings:

- Code: STD
- Description: Standard Cleaning Quality Audit
- Template type: Cleaning Quality Audits
- Site structure: Standard Cleaning Quality Audit
- Print style: Format6 (dropdown),  Print score card on last page only?
- Overriding score card: (use system default)
- Print images?
- Capture completer signature?
- Auto email recipients on contract when QA is complete?
- Auto email only signed QAs
- Complete by site location?
- Allow ad-hoc use?

## 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:

The screenshot displays the 'QA Template - Standard Cleaning Quality Audit' software interface. The main window shows a tree view of QA items. Two smaller windows are open: 'QA Criteria' and 'QA Items'.

The 'QA Criteria' window (bottom left) shows a table with columns 'Code' and 'Description':

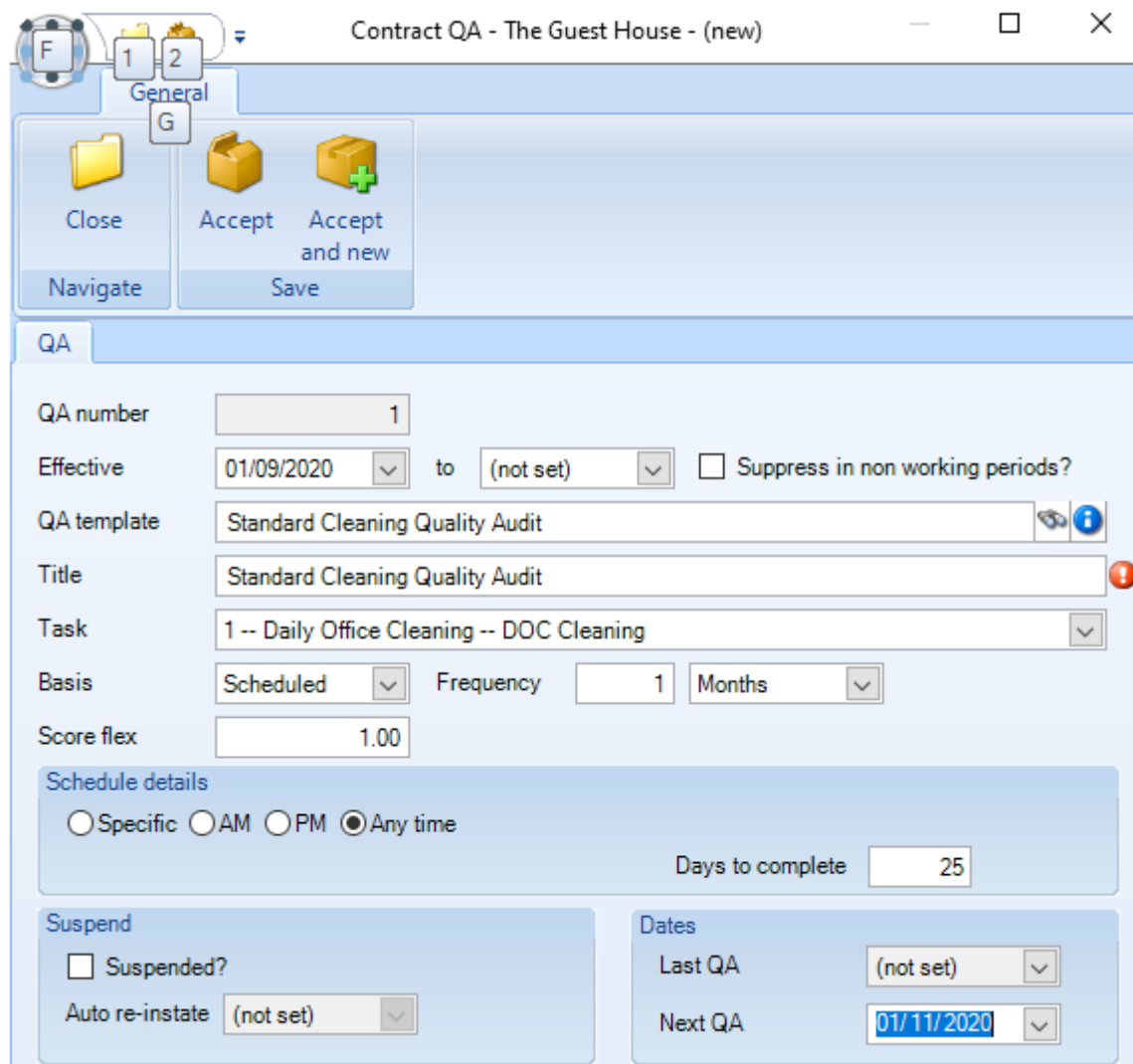
Code	Description
QA-1	EXCELLENT
QA-2	GOOD
QA-3	SATISFACTORY
QA-4	FAIL

The 'QA Items' window (middle right) shows a table with columns 'Code' and 'Description':

Code	Description
Group : C - Cleaning Scored Questions (9 items)	
C1	Floors
C2	Ceilings
C3	Walls
C4	Skirting
C5	Windows
C6	Toilets
C7	Wash Basins
C8	Showers/Baths
C9	Car Park
Group : G - Generic Questions (4 items)	
G1	Accompanied by Client?
G2	Staff Punctual?
S1	Are you interested in Washroom Services?
S2	Are you interested in ... ?

## STEP 9: ASSIGN QA TEMPLATE TO CONTRACT

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



Contract QA - The Guest House - (new)

General

Close Accept Accept and new  
Navigate Save

QA

QA number

Effective  to   Suppress in non working periods?

QA template

Title

Task

Basis  Frequency

Score flex

Schedule details

Specific  AM  PM  Any time

Days to complete

Suspend

Suspended?

Auto re-instate

Dates

Last QA

Next QA

**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.

# 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.

The screenshot shows the TemplaCMS interface. In the 'Row' toolbar, the 'One-off' button is highlighted with a red box. Below the toolbar is the 'QA Form List' table. The table has columns for Po, Di, C, Ty, QA number, Status, Frequency, Assigned to, Scheduled date, and Scheduled t. The table contains four rows of data:

Po	Di	C	Ty	QA number	Status	Frequency	Assigned to	Scheduled date	Scheduled t
				1	QA05 - Awaiting compl	One-off		28/04/2020	
				2	QA05 - Awaiting compl	One-off		28/04/2020	
				3	QA06 - Completed	One-off		24/07/2020	
				4	QA06 - Completed	One-off		30/07/2020	

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



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