

Quality Audits

TEMPLACMS

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COMMERCIAL STATEMENT

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INTRODUCTION

These training sessions notes & are designed with the intention of providing background information and useful hands-on experience of using general CMS functions.

These notes are designed to complement the training and assist you at a later stage when away from the training environment.

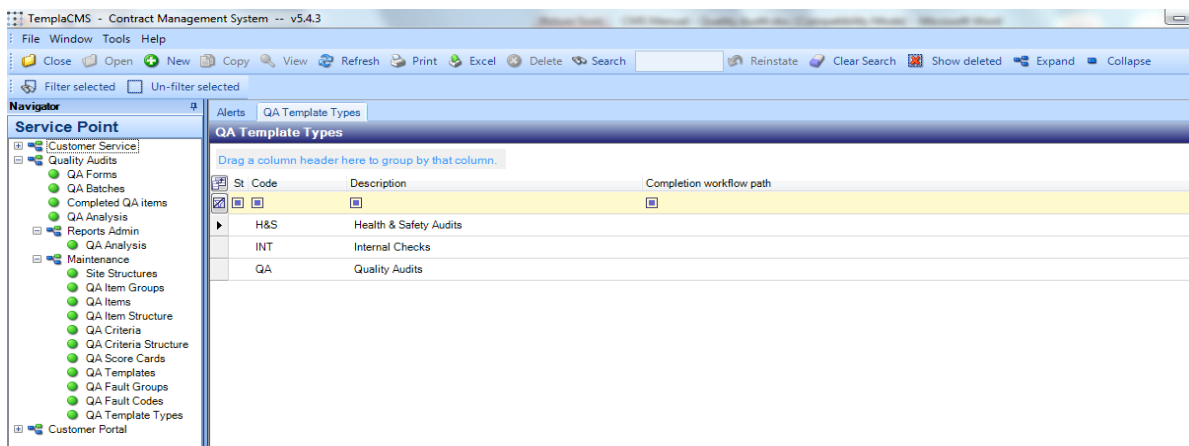
SYSTEM

License

The QA module is separately licensed so a relevant license key must be obtained from Templa and applied to Templa-CMS.

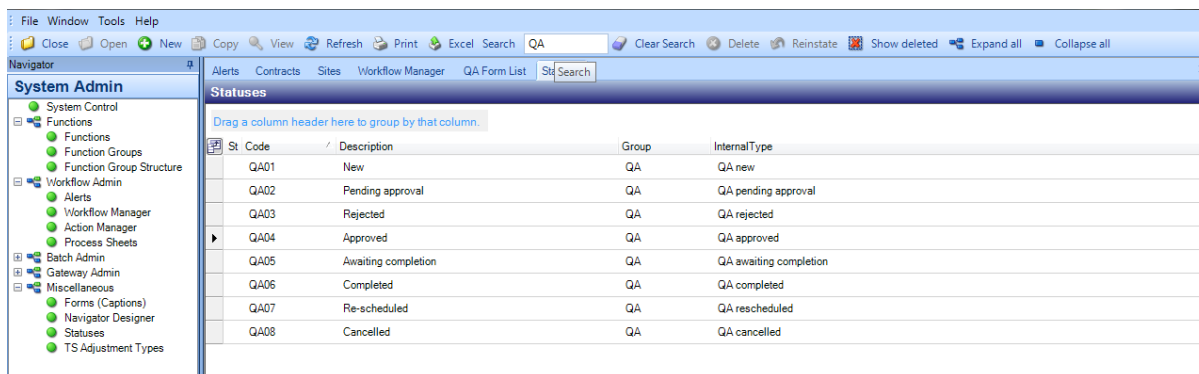
Menu structure / Navigator

The following default menu structure exists on the Service Point menu:



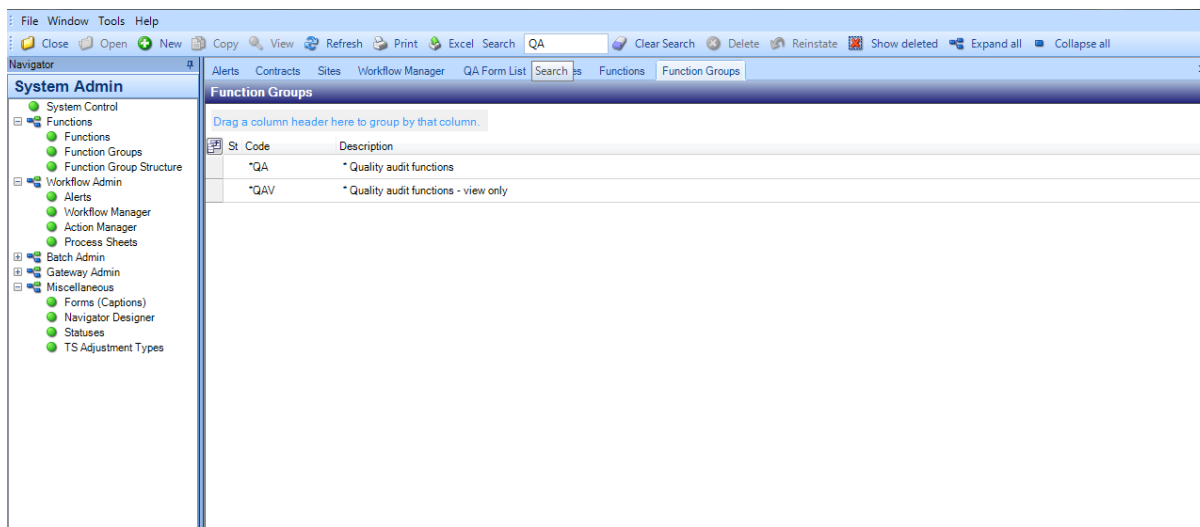
Statuses (for QA)

Statuses need to be defined for QA prior to any maintenance setup – these are defined on the System Admin > Miscellaneous menu and should be defined as follow:



Functions & Function Groups

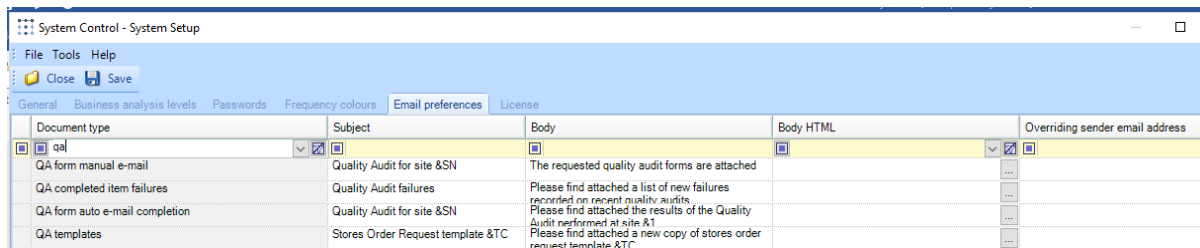
There is a vast range of new **functions** to cover all the new QA options. These have been grouped into the following two **function groups**:



It is up to the Templa-CMS system administrator to add these (or other bespoke) **function groups** into their existing **function group structure** so that only the relevant users see the relevant QA options.

System Control

GENERAL – EMAIL PREFERENCES



Where a specific HTML formatted email is required for QAs, this can be optionally specified here. The HTML file must be placed on a network path accessible to all users of TemplaCMS, and should it refer to any images, these too must be accessible to all users of TemplaCMS. Note that the substitutions as can be seen above for the email subject may also be used within the body of the HTML if required.

QUALITY AUDITS – TAB

System Control - Quality Audits

File Tools Help

Close Save

Quality Audits

QA administrator

Default score card Standard score card

Default suppress in non-working periods

Auto approve one-off QA forms

Show QAs on timesheets?

QA fault attachment type QA fault

QA signature attachment type QA signature

QA not signed contact Not Signed

Allow area level scoring

Completion reminder days 5

Reschedule completion days 5

Sync lapse alert hours 0

SystemControl_QA © 2017 Templa Computer Systems Ltd

QA administrator – a TemplaCMS user notified of any site location changes made on the mobile device

Default score card – a default **score card** must be defined which is used on the contract QA tab as the default (unless overridden)

Default suppress in non-working periods – if checked, a **QA form** would not be created from the **QA batch** process during any non-working periods, as determined by checking the contract's site calendar.

Auto-approve one-off QA forms – if checked, any one-off **QA forms** would not require workflow approval before being 'posted'; if unchecked, the 'Quality Audit Approval' workflow path will be used for workflow signoff.

Show QA's on Timesheets – this needs to be checked if the QA tab is to be additionally shown on the timesheets, as Workbills are.

QA not signed contact – a default contact needs to be assigned here to be used when a completed QA has not been signed (on the mobile device) and thus no contact selected.

QA Fault & QA Signature attachment type – appropriate QA-level attachment types with the relevant permissions needs to be assigned.

Allow area level scoring – the default can be set here which is then defaulted on to all QA templates created subsequently

Completion reminder days – the number of completion reminder days specified is applied as relative to the scheduled end date of the QA, and as such will allow entry of either a positive or negative number of days. For example, with a scheduled completion of 25th, an entry of +1 would generate the reminder on the 26th, whilst an entry of -2 would be the 23rd.

Reschedule completion days – where an ad-hoc QA is created as a re-schedule from another (failed) QA, the schedule date range will now apply the nominated 're-schedule completion days' to the current date in order to derive the 'schedule to' date.

Sync lapse alert hours – this allows the user to define the number of hours after the last sync of each mobile device before an alert is sent out to the nominated QA administrator (as defined above); if left as 0 then no alert will be sent.

TemplaCMS mobile options

The following fields are used in conjunction with CMS mobile:

- *QA fault attachment type*
- *QA signature attachment type*
- *QA not signed contract*
- *Allow area level scoring* – allows scoring for the whole area.

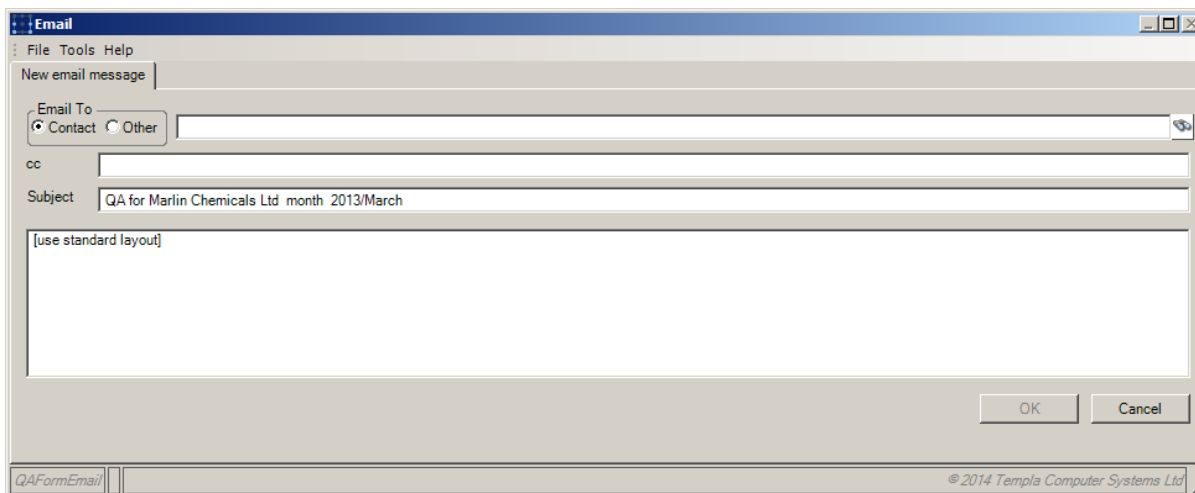
QA Emailing

QA COMPLETION EMAILING

During completion processing, the **System Control** settings will be used in preference to the standard email formatting, with the necessary substitutions being performed on the subject and the contents of the HTML. Where the ‘Send emails from customer service email address’ checkbox has been ticked, the nominated email address as defined on the accounts datasource ‘Customer Service’ tab will be used in preference to the logged in user, or standard email address.

MANUAL QA EMAILING

When manually emailing a QA, the subject will be automatically formatted as per the system control settings:



As can be seen in the above screenshot, if an HTML file is defined it will not be displayed here, but the body text will read ‘[use standard layout]’. When the email is sent this will trigger the incorporation of the necessary HTML. If the user makes any changes to this body text, then the HTML will be ignored, and the user defined text sent in its place.

Where the ‘Send emails from customer service email address’ checkbox has been ticked, the nominated email address as defined on the accounts datasource ‘Customer Service’ tab will be used in preference to the logged in user, or standard email address.

Datasources – Customer Service Details

The **Customer Service** tab on **Datasource** maintenance allows the customer service department's details to be entered (where they differ from the main company details) for printing on 'Format2' QA forms:

The screenshot shows a software window titled "Datasource Details - (new)". It has a menu bar with "File", "Tools", and "Help". Below the menu is a toolbar with icons for "Close", "Save", "Save and new", and "Control details". There are three tabs: "General", "Customer service", and "Dates", with "Customer service" selected. The form contains the following fields:

- Customer service name:
- Address:
- Town:
- County:
- Postcode:
- Telephone:
- Email:
- Fax:
- Website:

At the bottom of the window, a status bar shows "DatasourceDetail" and a red error message: "Invalid code entered".

MAINTENANCE

QA Score Cards

QA score cards are used to define how a QA is scored within your company – for example, some companies score everything out of three, others out of five, others out of ten, etc.

GENERAL TAB

The screenshot shows a software window titled "QA Score Card - Standard". It has a menu bar with "File", "Tools", and "Help". Below the menu is a toolbar with icons for "Close", "Save", "Save and new", "Previous", and "Next". There are three tabs: "General", "Scores", and "Dates", with "General" selected. The form contains the following fields:

- Code:
- Description:
- Score range: to

Below the fields is a "Comments" section with a text area containing the text: "This has been defined as the default score card".

At the bottom of the window, a status bar shows "QAScoreCardDetail" and a copyright notice: "© 2013 Templa Computer Systems Ltd".

Score range – this should be the range you score (e.g. 1-5) plus one (i.e. 6 here) as a score entry needs to be defined for any areas that could not be audited for any reason.

SCORES TAB

Score	Text	Exclude?	Value	Apply flex?	Colour	Force comments?	Failed?	Failure SR	Failure SR source
1	1 Poor	<input type="checkbox"/>	1.00	<input type="checkbox"/>	255, 0, 0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2	2 OK	<input type="checkbox"/>	2.00	<input type="checkbox"/>	255, 192,	<input type="checkbox"/>	<input type="checkbox"/>		
3	3 good	<input type="checkbox"/>	3.00	<input type="checkbox"/>	0, 255, 0	<input type="checkbox"/>	<input type="checkbox"/>		
4	4 Not audited	<input type="checkbox"/>	2.00	<input type="checkbox"/>	192, 0, 19	<input type="checkbox"/>	<input type="checkbox"/>		

Score – the score, i.e. 1-5 in the above example; however, a further score option (i.e. 6) should be added to cater for areas that could not be audited.

Text – description of the score but it is recommended that the score precedes the description, i.e. **3 - Good** rather than just **Good**

Exclude? – rather than giving a nominal score to any ‘not audited’ **QA item** or **QA area**, which in turn would pull the overall score down, the option exists to ‘Exclude’ a **QA item** or **QA area** from being scored and thus from effecting the overall scoring compliance. This is particularly useful during initial implementation when more generic (i.e. not building-specific) **QA templates** may exist, e.g. for an office block with 10 floors or a school with ten classrooms, where unwanted QA areas could be optionally excluded by the Quality Assessor

Value – the value of your score, for example **1 - Poor** might score no points or **5 - Excellent** might score an extra point; **Not audited** in particular needs to be given a value, usually somewhere around the average of the normal score range

Apply flex – which scores can be flexed, for example if there are areas within a building that are more important (e.g. customer-facing areas such as reception, board room, etc) then it might be desirable to flex the scores for these areas so they again a fewer (or extra) points, i.e. a **4 - Very Good** might be flexed by a score of minus 1 so would score 3 thus incentivising the area manager to ensure his cleaning staff achieved the top score of **5 - Excellent** in such key areas of the customer’s business. As such, the top score (i.e. **5 - Excellent**) should not be flagged to **apply flex**.

NB: it is recommended that initially no flexing is defined, at least, initially

Colour – pick a colour to match the score

Force comments - Any score identified as ‘failed’ will automatically require the user to enter a comment describing the failure. When checked the **Force comments** option require comments to be entered on other scores not flagged as **Failed**.

Failed – flag those scores considered by the company (not the customer) to be failures; failures can be counted and reported upon, plus demand completion notes when completing **QA forms**.

Failure SR – it is possible to trigger a ‘service request’ for any failures for ‘Customer Services’.

NON-QA ‘SCORE CARDS’

In addition to defining one (or more) generic score cards for reporting back to the customer on your company’s QA performance, score cards can also be created for other reasons. For example, whilst undertaking a Quality Audit, the customer might ask for the gas or electric meter to be read or the company might require the person carrying out the Quality Audit to check the uniform stock, etc. Such requirements typical need a Yes/No ‘score card’ to be defined, as shown below:

QA Score Card - Yes/No

File Tools Help

Close Save Save and new Previous Next

General Scores Dates

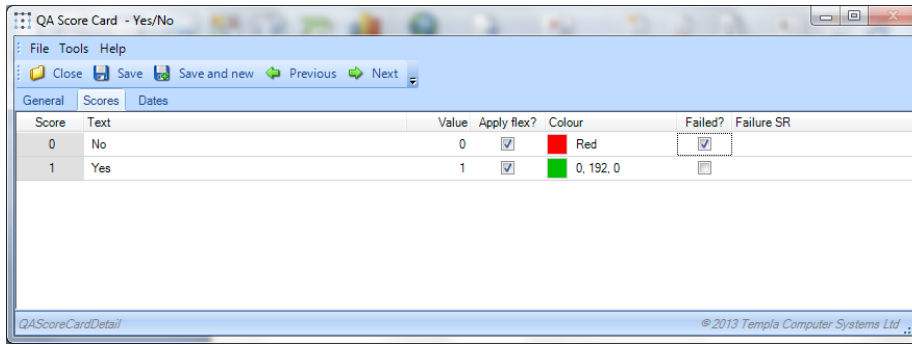
Code: Y/N

Description: Yes/No

Score range: 0 to 1

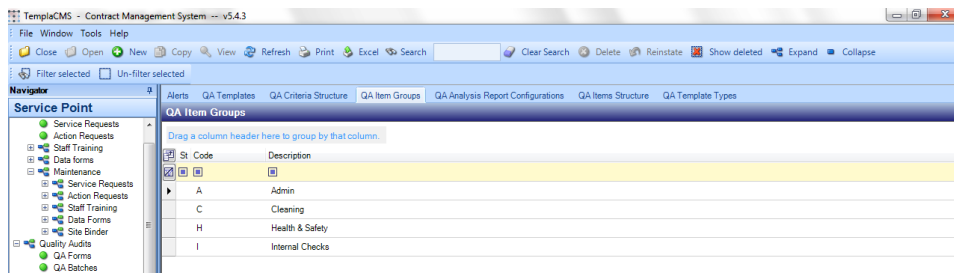
Comments: This score card for internal use only

QAScoreCardDetail © 2013 Templa Computer Systems Ltd

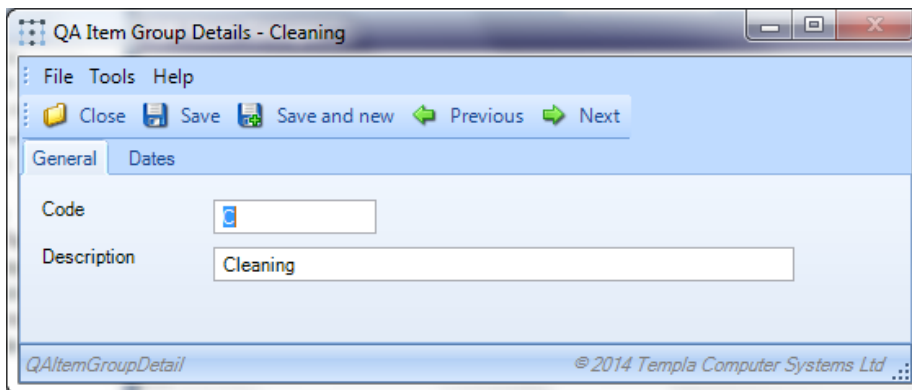


QA Item groups

QA item groups allow **QA items** to be easily grouped together for maintenance and QA analysis reporting. Typically, separate **QA item groups** would be created for each area of the business (e.g. Quality Audits, H&S, etc) and/or for each set of templates (e.g. internal company QA items, external council QA items, etc.), for example:

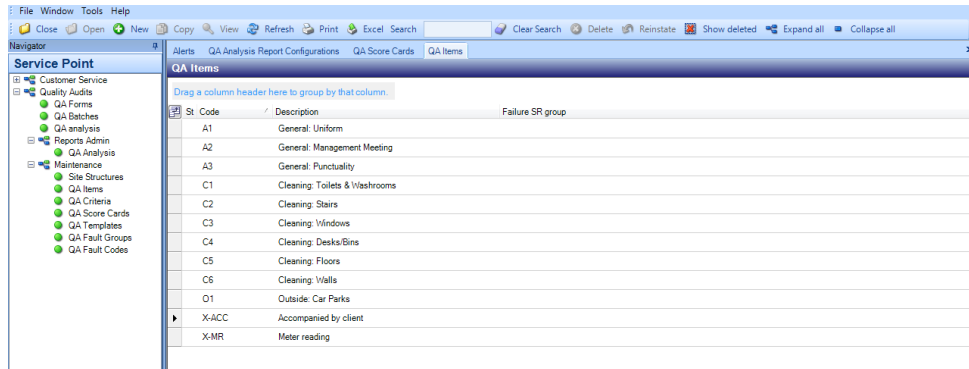


GENERAL TAB

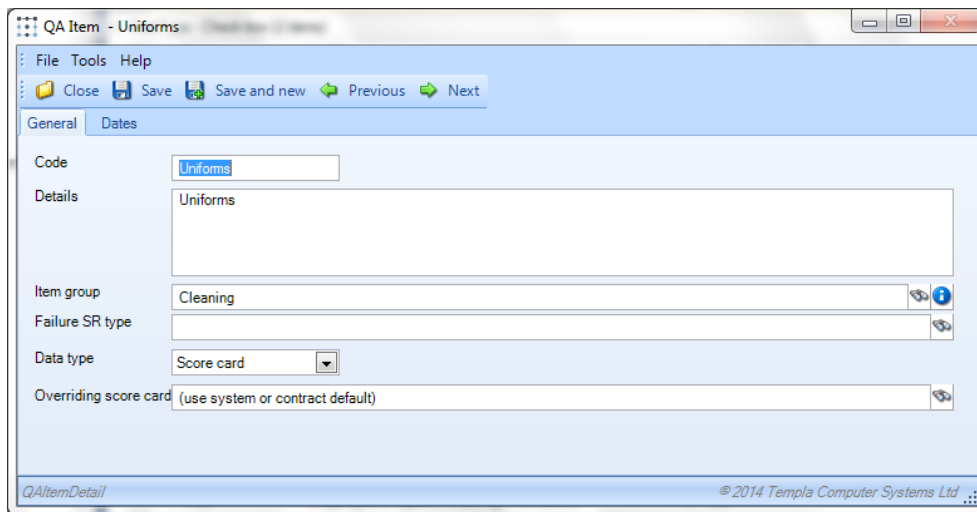


QA items

QA items are a list of the ‘things’ to be Quality Audited. The list of **QA items** should be kept as small as possible so should include generic items (e.g. Toilets/Washrooms) rather than specific items (e.g. first-floor men’s toilets) as shown in the example below:



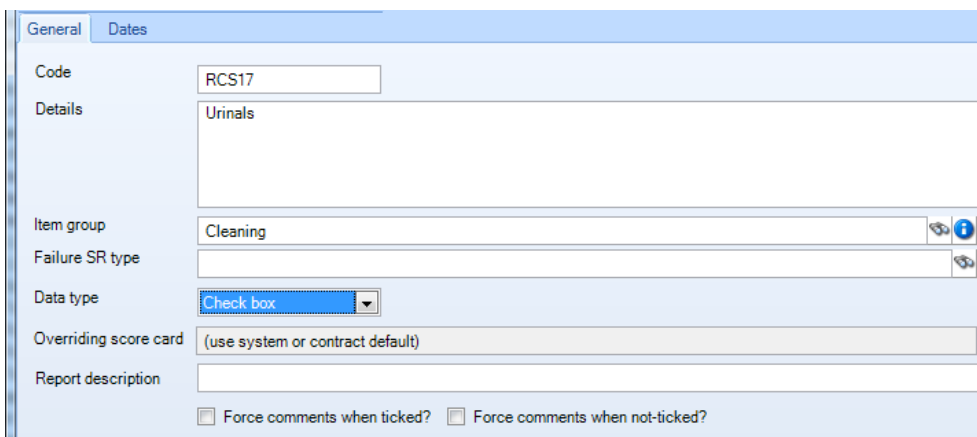
GENERAL TAB



QA Item Groups – a **QA item** has to be assigned to a **QA item group**; these are used solely to enable easy grouping of QA items, e.g. Cleaning QA items, H&S QA items, etc

Failure SR group – it is possible to trigger a specific ‘service request’ for any failures for ‘Customer Services’.

Data type – all QA items that are to be scored must have a data type of ‘score card’. However, other data types are available, namely: text, check box, date, date & time, plus numeric with a various number of decimal places. Thus, for example, if the client is to accompany the company’s quality assessor or if meter reading is to be carried out, then these would be defined with the following data types:



Within the QA form on both Server and TemplaCMS Mobile versions, the ‘Force comments when ticked?’ and ‘Force comments when not-ticked?’ settings, if applied, will require the user to enter comments based on whether or not the QA item is ticked.

Overriding score card – when a **QA form** is created, it will use the system control default or contract **score card** unless a specific **score card** is associated with this **QA item** here.

Report description – a shortened description for use on the ‘QA Audit Summary Report’

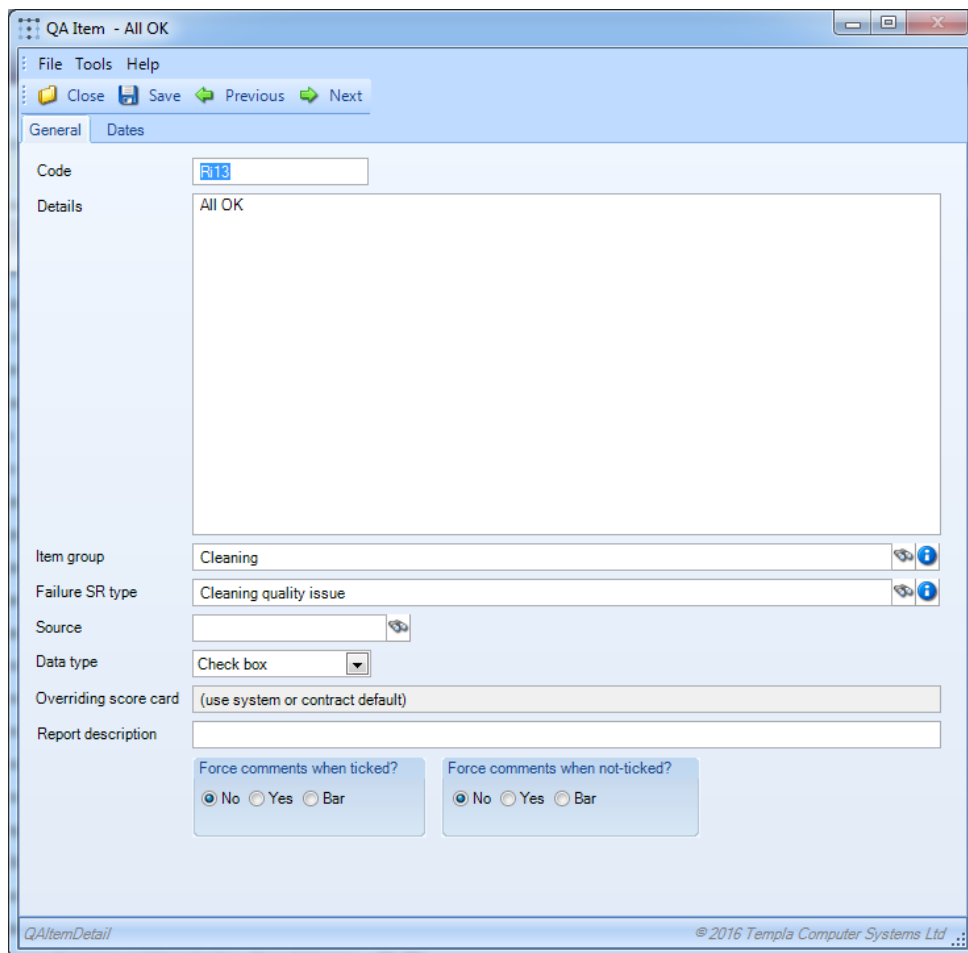
Force comments – available on **QA items** for all data types except score cards and will work as follows (on TemplaCMS and the mobile application) when used:

- Checkbox data type – forces comments when made un-checked, i.e. “No”
- Date fields – forces comments when no date is entered
- Numeric fields – forces comments when no value is entered
- Text – forces comments when left blank
- None – forces comments

Conditional QA Comments

The **Force comment when ticked?** and **Force comment when not-ticked?** each have three options:

- Yes
- No
- Bar



The screenshot shows a window titled "QA Item - All OK" with a menu bar (File, Tools, Help) and a toolbar (Close, Save, Previous, Next). The window is divided into two tabs: "General" and "Dates". The "General" tab is active, showing the following fields and options:

- Code:** A text box containing "R12".
- Details:** A large text area containing "All OK".
- Item group:** A dropdown menu set to "Cleaning".
- Failure SR type:** A dropdown menu set to "Cleaning quality issue".
- Source:** A text box with a search icon.
- Data type:** A dropdown menu set to "Check box".
- Overriding score card:** A text box containing "(use system or contract default)".
- Report description:** A text box.
- Force comments when ticked?:** Three radio buttons: "No" (selected), "Yes", and "Bar".
- Force comments when not-ticked?:** Three radio buttons: "No" (selected), "Yes", and "Bar".

At the bottom of the window, there is a footer with "QAItemDetail" on the left and "© 2016 Templa Computer Systems Ltd" on the right.

These **QA item** settings will affect how such **QA items** are completed on **QA forms**, be that on TemplaCMS or on the TemplaCMS mobile application where if ‘barred’ the **Comment** box will not be available.

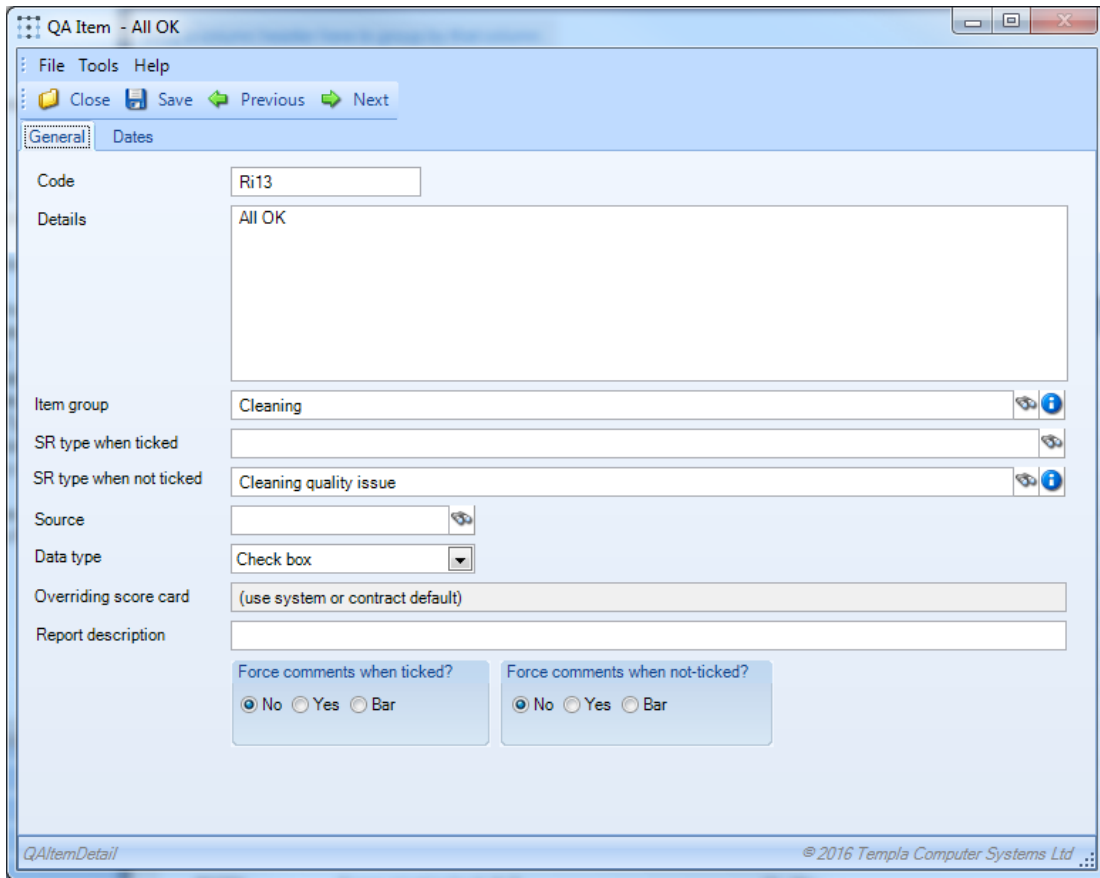
When completing a **QA form**, TemplaCMS will check each **QA item** to ensure that **comments** are entered based on the details defined on the **QA item’s definition**.

This applies when completing a QA form on the server, or on the TemplaMobile (v2) app.

Create SR from Checkbox QA Item

A score card type QA item allows a **failure SR type** to be entered against it so any failed item on a QA form will spawn a service request on completion. For other data type QA items it is not possible to create a service request on completion as they do not count as failed.

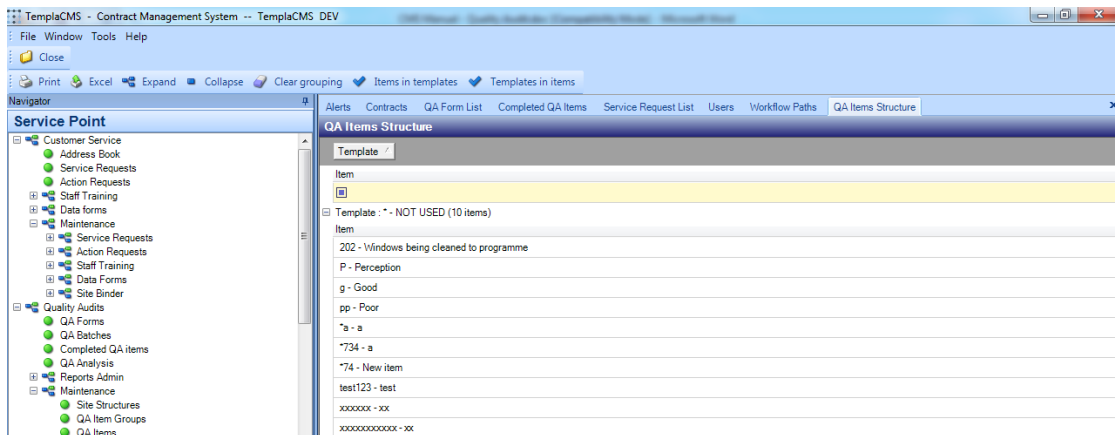
For a checkbox data type **QA item** it is possible to enter an **SR type when ticked** and **SR type when not ticked**.



When either option is entered, on completion of a QA a service request will be created using the relevant SR type based on whether or not the QA item was ticked.

QA Item Structure

This informational grid shows which **QA items** are used on which **QA templates** – thus if any **QA items** are to be changed, the **QA templates** affected can be quickly checked, or if they are not used at all they can be easily identified:



QA Criteria

QA criteria are the definition of the measurements (i.e. performance rating) against which the company’s QA process is to be measured; for example, the company’s QA process might have the following compliance percentages:

St. Code	Description	Criteria test	Creates SR
01	Poor	Compliance percentage : 0.00 to 39.99	
02	Average	Compliance percentage : 40.00 to 59.99	
03	Good	Compliance percentage : 60.00 to 79.99	
04	Very good	Compliance percentage : 80.00 to 99.00	
05	Excellent	Compliance percentage : 99.01 to 100.00	
FC	Failed too many	Fail count : 2.00 to 999.00	

GENERAL TAB

QA Criteria - Poor

File Tools Help

Close Save Save and new Previous Next

General Dates

Code: 01

Description: Poor

Type: Compliance perce from 0.00 to 39.99

Colour: 255, 0, 0 Auto re-schedule QA form?

Creates SR:

QACriteriaDetail © 2013 Templa Computer Systems Ltd

Type – defines the type of measurement being undertaken where the options are:

- Average score
- Compliance percentage
- Fail count
- Fail percentage

Regardless of the **type** selected, the ‘**from/to**’ range must be entered; these ranges **must** be defined so that they correctly cover the full spectrum and there are no overlaps or gaps.

Colour – pick a colour appropriate to the type’s range

Auto re-schedule QA form – if the Quality Audit is of unsatisfactory compliance then by checking this checkbox another **one-off QA form** will be automatically created in order for a subsequent Quality Audit check to be carried out. This subsequent **QA form** will be sent into Workflow using the ‘QA Approval’ workflow path unless the system control flag has been checked to auto-approve ad-hoc **QA forms**.

Creates SR – when selected it is possible to create a **Service request** for any such flagged **QA items** for **Customer Services**.

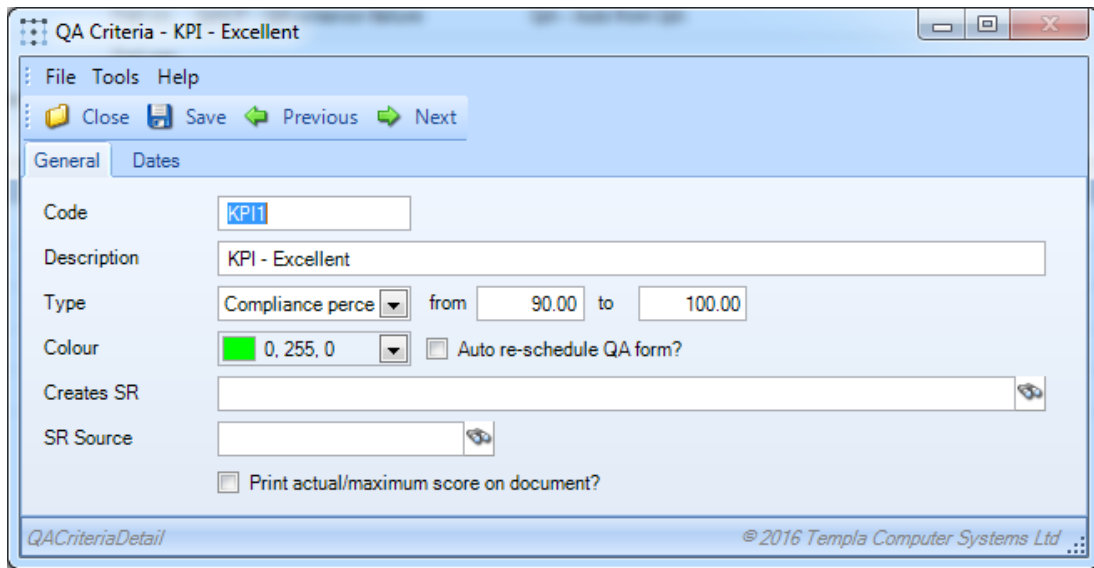
QA Criteria Structure

This informational grid shows which **QA criteria** are used on which **QA templates** – thus if any **QA criteria** are to be changed, the **QA templates** affected can be quickly checked.

QA – Print Actual Scores

QA criteria's allows the user to select whether they would like the actual score to be printed alongside the QA criteria measure.

The **Print actual/maximum score on document?** check box allows the user to enable/disable this new feature:



The screenshot shows a software window titled "QA Criteria - KPI - Excellent". The window has a menu bar with "File", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Close", "Save", "Previous", and "Next". The main area is divided into two tabs: "General" and "Dates". The "General" tab is active and contains the following fields:

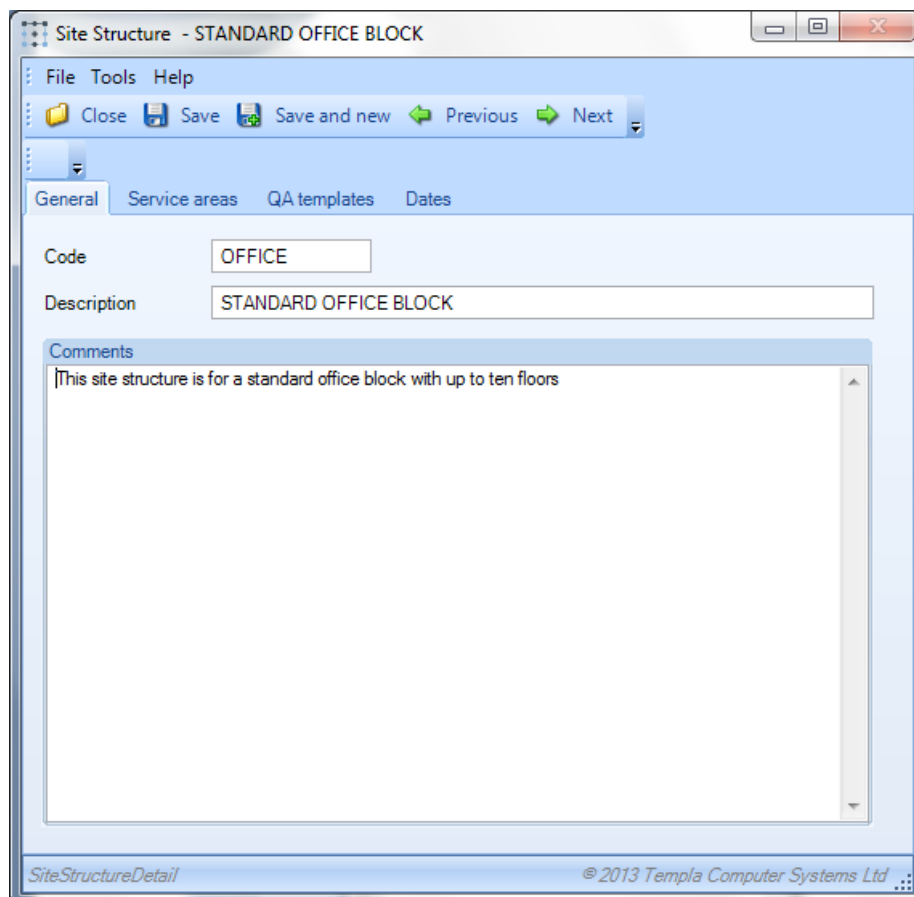
- Code: KPI1
- Description: KPI - Excellent
- Type: Compliance percce (dropdown) from 90.00 to 100.00
- Colour: 0, 255, 0 (dropdown) Auto re-schedule QA form?
- Creates SR: (empty text field)
- SR Source: (empty text field)
- Print actual/maximum score on document?

The footer of the window displays "QACriteriaDetail" on the left and "© 2016 Templa Computer Systems Ltd" on the right.

Site Structure

There should be one **Site structure** per **QA form**, although ideally **Site structures** (in the similar way to 'site calendars' for contracts) should be as generic as possible.

GENERAL TAB



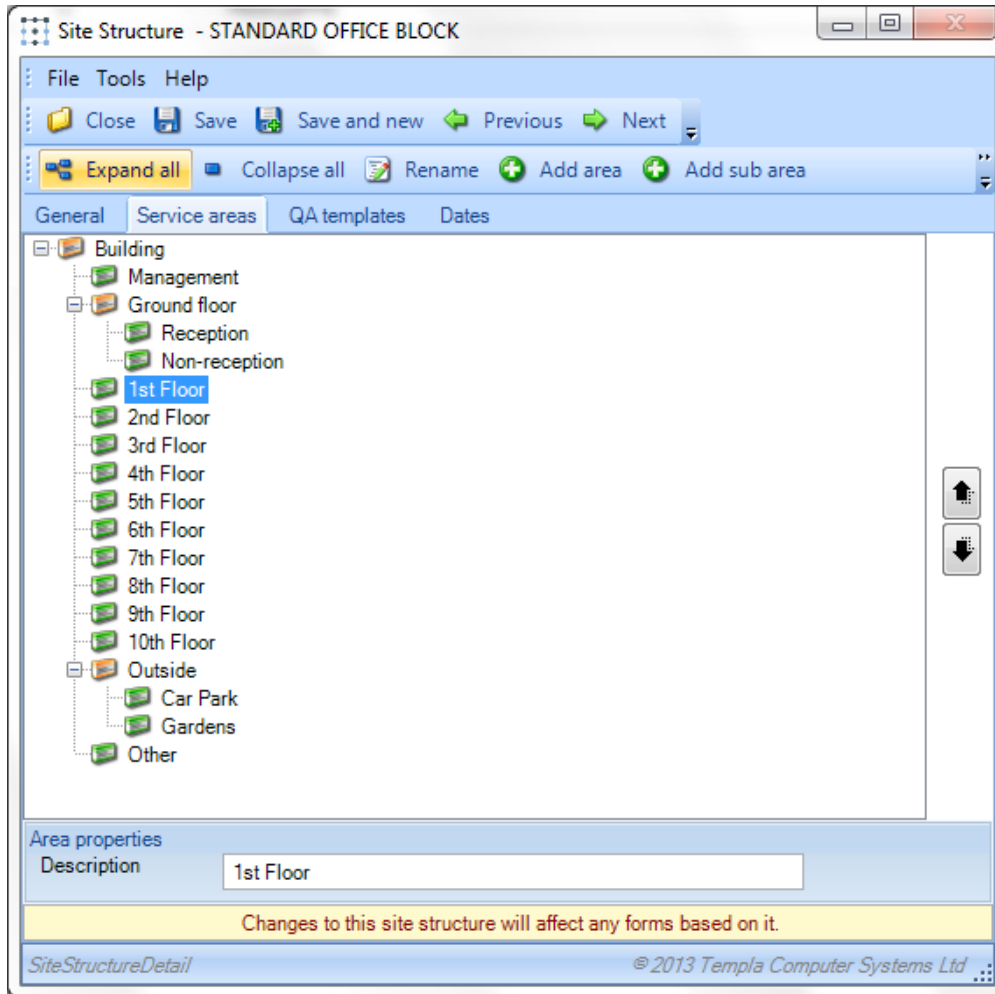
The screenshot shows a software window titled "Site Structure - STANDARD OFFICE BLOCK". The window has a menu bar with "File", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Close", "Save", "Save and new", "Previous", and "Next". The main area is divided into four tabs: "General", "Service areas", "QA templates", and "Dates". The "General" tab is active and contains the following fields:

- Code: OFFICE
- Description: STANDARD OFFICE BLOCK
- Comments: This site structure is for a standard office block with up to ten floors

The footer of the window displays "SiteStructureDetail" on the left and "© 2013 Templa Computer Systems Ltd" on the right.

SERVICE AREAS TAB

All key areas and sub-areas should be added to the building, as shown below:

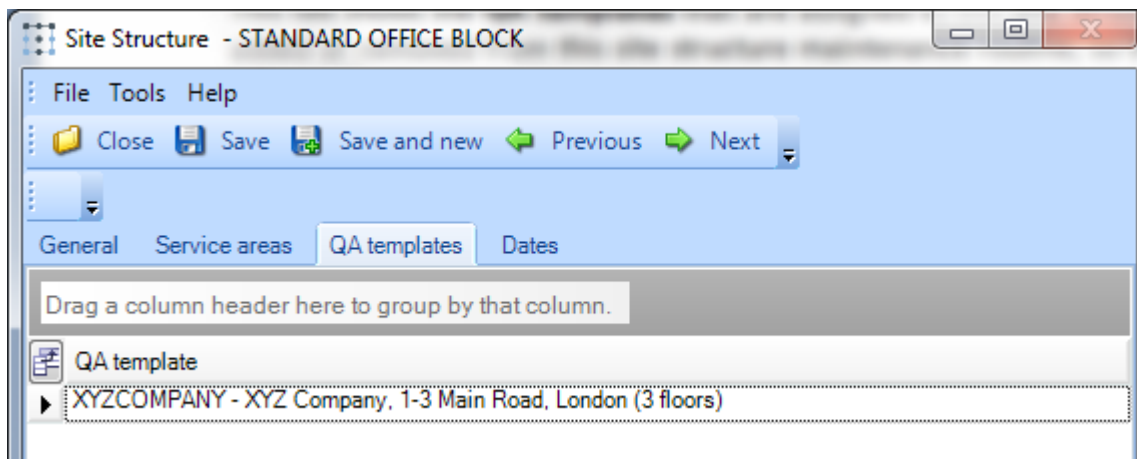


Area properties – the description can be amended

Add area / Add sub area – as many nested levels as required can be added to the site structure

QA TEMPLATES TAB

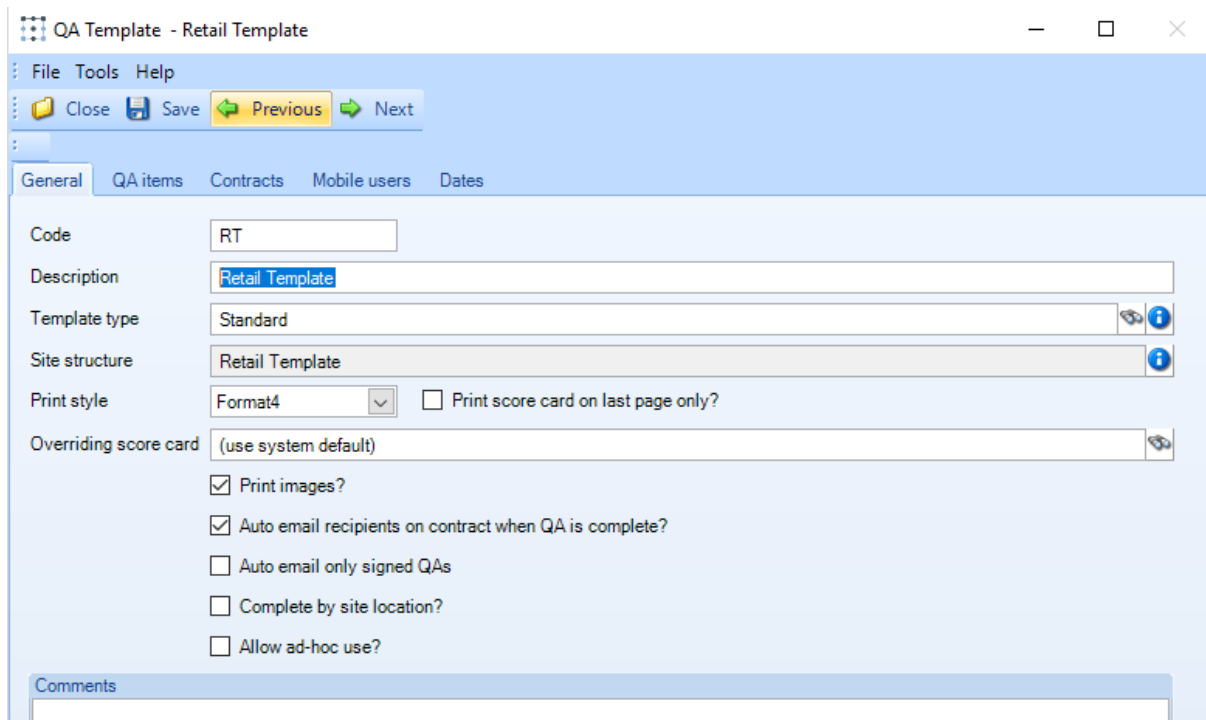
This tab shows the **QA templates** that are assigned to this **Site structure** – these cannot be added or removed from this site structure maintenance routine, so these details are purely informational.



QA Templates

There needs to be one **QA template** for every site or building to be Quality Audited.

GENERAL TAB



Template type – a valid site template type **must** be selected

Site structure – a valid site structure **must** be selected which then defaults on to the **QA items** tab, as shown overleaf.

Print style – there are a number of **QA form formats**, of which the second (Format2) additionally prints a footer logo.

Overriding score card – an overriding QA score card can optionally be assigned to the QA template where the QA score card differs from the system default. QA score cards are applied in the following sequence: QA item, QA area, contract, QA template, system.

Please note: a QA score card reference is stamped on the QA form when the QA form is posted (be that a contracted QA or one-off QA) so that if the QA score card assignment is changed after the QA form is created, this will have no effect on any existing QA forms; conversely, if the QA score card's definition is changed, then this will have an effect.

Print images – when checked, any photos that were capturing during the entry of QA results via CMS mobile either at header or item level, will now appear on the QA form print at header or item level, with potentially multiple photos printing per row.

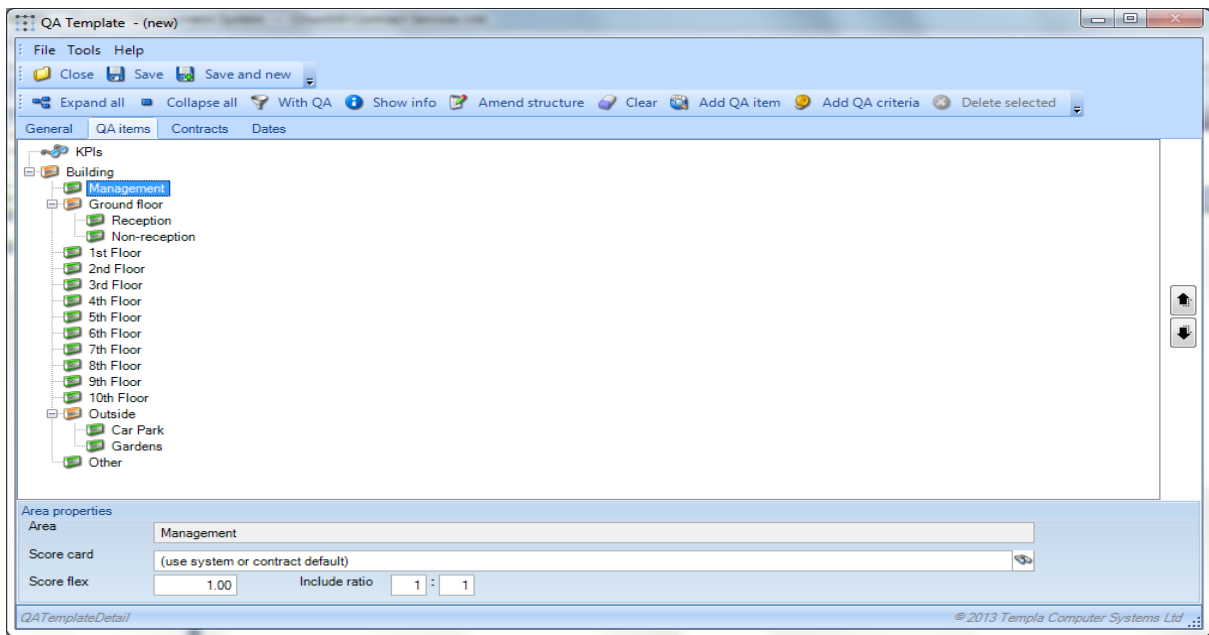
Auto email recipients on contract when QA is complete? – when checked, any form originating from such a flagged template will e-mail to any **QA form** recipients checked on the contract 'QA form recipients' list, immediately after final approval of a **QA form**.

Auto email only signed QA's – when both this box and the above 'Auto email recipients on contract when QA is complete?' option are ticked QA forms will be automatically emailed only where the 'signed contact' on the form is specified and it is not the nominated 'QA not signed contact' as held on the 'System Control -> Quality Audits' option.

Complete by site location? – when checked, this will control the prompting of the list of sub-locations when completing a **QA form**, be that on the main TemplaCMS system or the mobile device – see **Site locations**.

Allow ad-hoc use? – when checked, it will allow the **QA template** to be selected when creating a one-off QA regardless of whether the template has been directly assigned to the site contract.

QA ITEMS TAB



KPIs – the **QA criteria** defined here is what the customer sees

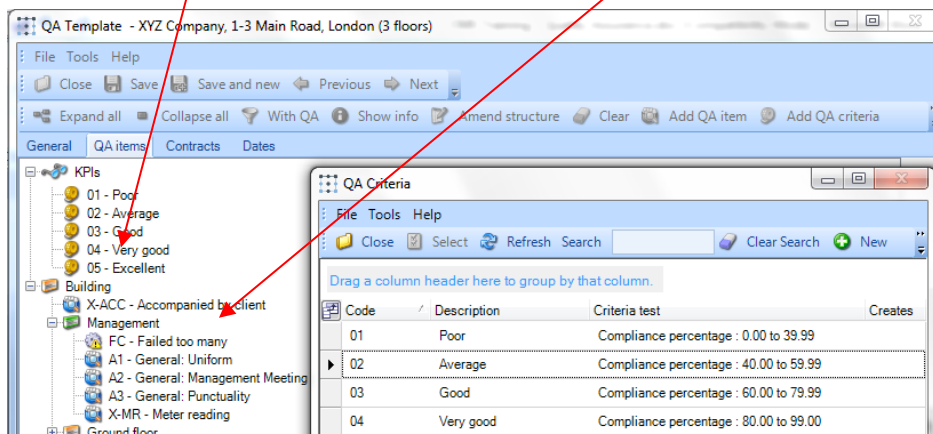
Area properties – once the site structure exists, highlighting any area will allow the area’s properties to be optionally overridden by:

- **Score card** – adding a specific **Score card** as might be required, for example, if the management area just needed to have a Yes/No score (rather than 1-5) or if a totally different score card range (e.g. 1-10) was required for a certain area; this allows a score to be entered at ‘area’ rather than ‘item’ level and therefore applies the same score to all items in the area, including nested sub-areas – this only works if all items under the area use the same score card
- **Score flex** – this might be required for key areas of the building, e.g. reception might have a score flex of 0.5 which would mean every score is halved (with the exception of the top score which is not flexed – see **QA score cards** above) so that this then drives the area manager to ensure cleaning is excellent in this area of the building.
- **Include ratio** – if some areas do not need to be done every QA visit then a ratio can be defined, e.g. 1:2 (every other QA visit) or 1:3 (once every three QA visits), etc. – there is also some randomness as to the start point when ratios are defined; this is designed to prevent area managers completing the QA form without inspecting

The buttons available at the top of the **QA items** tab will now be reviewed **from right to left**.

Add QA criteria

The **Add QA criteria** button should be used to add the necessary **QA criteria** – these will be automatically added into the **KPIs** area of the **QA template** if no area is highlighted or in the required area within the building site structure if one is so highlighted, as shown below:

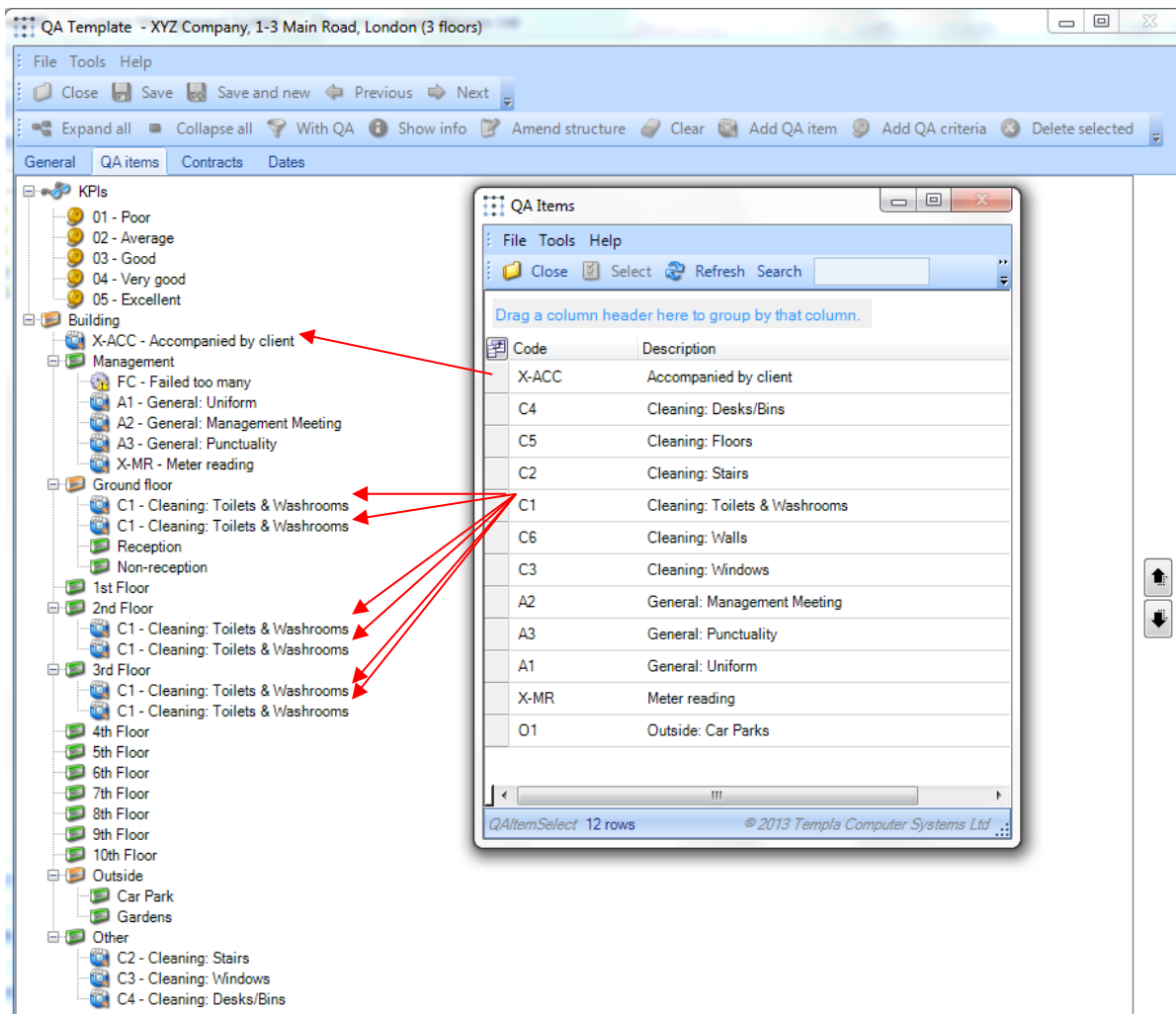


Criteria properties – once added to the **QA template**, highlighting any of the **QA criteria** will allow the criteria’s properties to be optionally overridden using the **Override** flag.

Please note: a QA criteria reference is stamped on the QA form when the QA form is posted (be that a contracted QA or one-off QA) so that if the QA criteria assignment is changed here after the QA form is created, this will have no effect on any existing QA forms; conversely, if the QA criteria’s definition is changed, then this will have an effect and if the QA form has already been completed then the completed QA form can be ‘Re-accessed’ using the Re-access button to take the latest QA criteria’s definition into account.

Add QA item

The **Add QA Item** button should be used to add **QA items** into the required highlighted area within the building site structure; indeed, **QA items** can be multi-assigned to many areas as is the case below with “Cleaning: Toilets & Washrooms”:



NB: if the same QA items need to be added on multiple areas, then having selected the QA items against the initial floor, they can be copied to any number of additional areas by holding down the control key, i.e. the ‘MS Windows’ standard when working on a tree view.

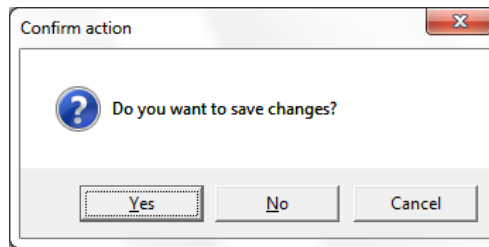
Item properties – once added to the **QA template**, highlighting any of the **QA items** will allow the item’s properties to be optionally overridden using the **Override** flag so allow a service request, e.g. top-floor toilet failure important as these are used by the directors.

Clear

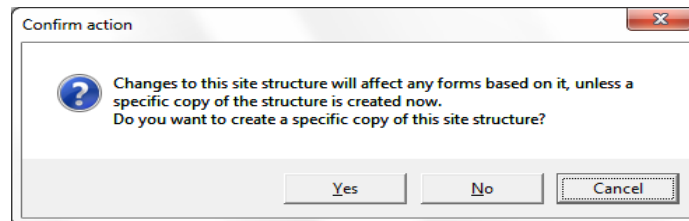
The **Clear** button removes all **QA criteria** and all **QA items** from the **QA template** – no warning is given so use this button carefully and, if actioned in error, do not save the results.

Amend Structure

The **Amend Structure** button allows the site structure to be amended and a new version of the site structure saved. As such, when this button is pressed the following screen is shown:



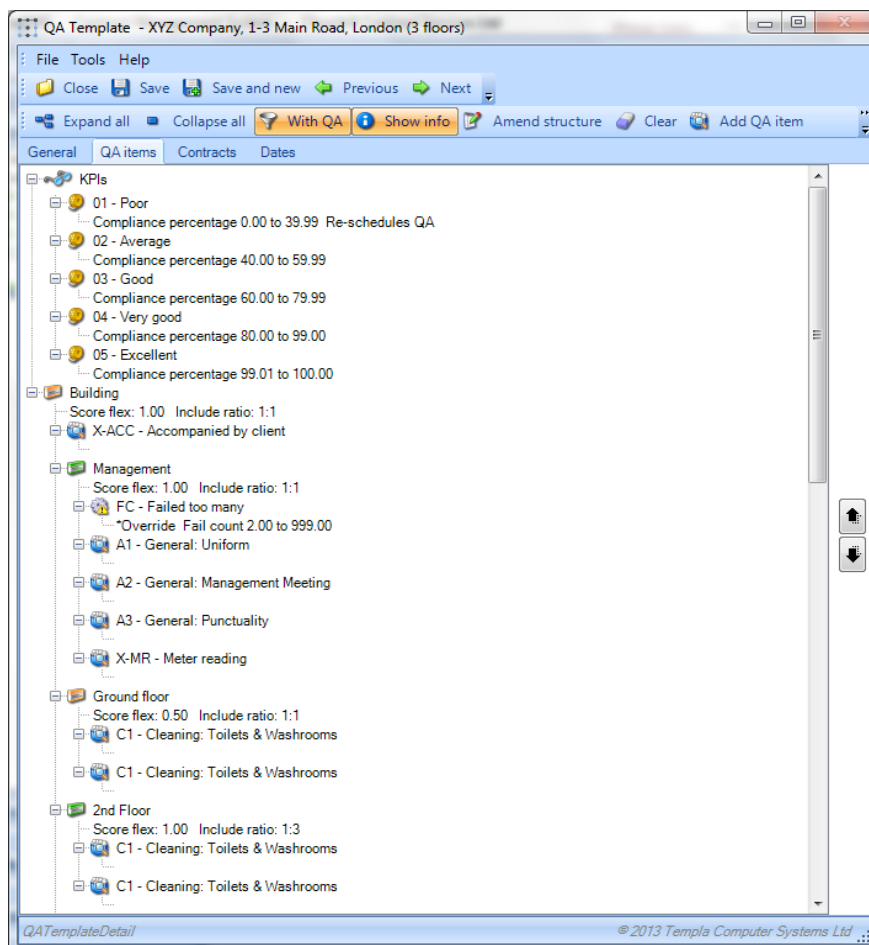
If **Yes** is taken, then a further screen is prompted, as follows:



If **Yes** is taken, then the **Site Structure > Service areas** tab is displayed (see relevant section above); at this point the operator can amend the site structure which will subsequently be saved with a new temporary site structure code, i.e. *1, etc.

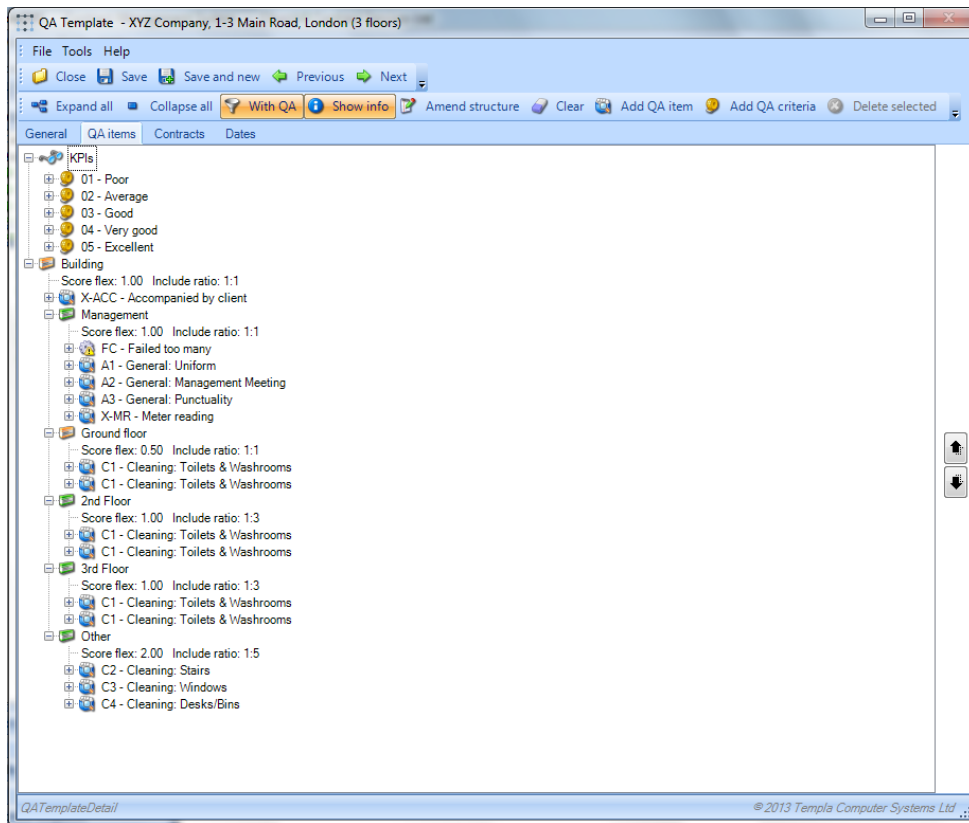
Show Info

The **Show Info** button (in conjunction with the **Expand all** button) provides an extra level, detailing the QA criteria settings, along with any QA score card flexing that has been defined against any site structure area:



With QA

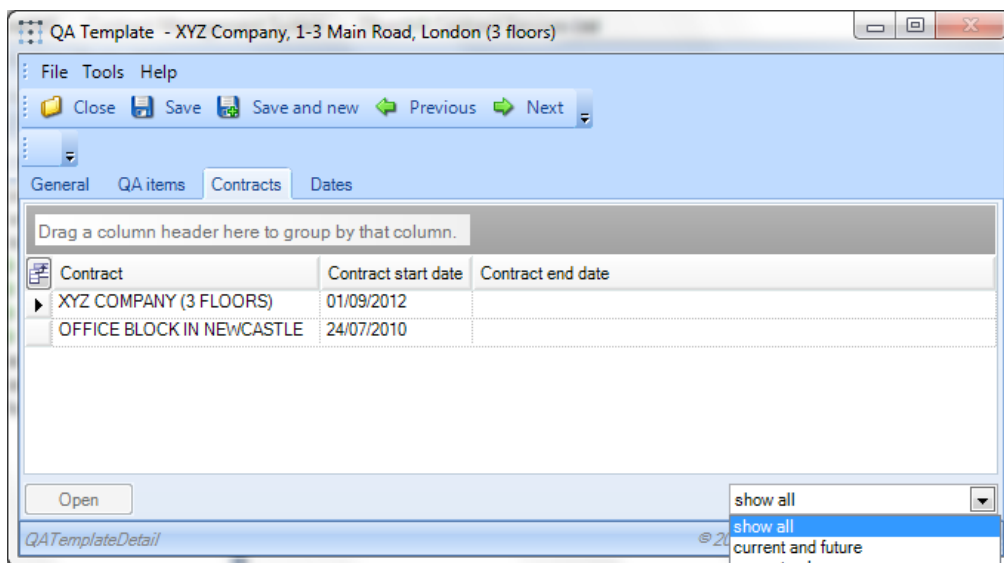
The **With QA** button provides the facility to toggle between all areas defined on the site structure defined to a **QA template** and just those areas with **QA criteria** and **QA items** assigned, as in the example below:



NB: this view demonstrates how a generic Site structure could be created (e.g. Standard Office Block) to build multiple 'specific' QA templates

CONTRACTS TAB

The contracts tab provides a list of all live contracts that are assigned to the **QA template**:



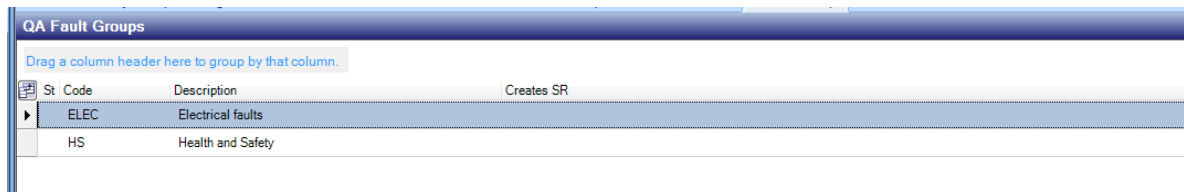
Status (bottom right) – allows the contract to be filtered, thus if Quality Audits are agreed and setup annually, historical ones can be excluded from this view.

QA ITEM DESCRIPTION TYPE

This provides options for 'Dynamic' (the default behaviour as now) and 'Fixed'. If fixed, the QA form copies the QA item's description into the QA form. If the QA item description is changed therefore, the existing QA form will retain the original QA item description. Existing QA items cannot be changed from 'dynamic' to 'fixed' else past QA forms will have no record of the QA item description at the time of QA form creation.

QA Fault Groups

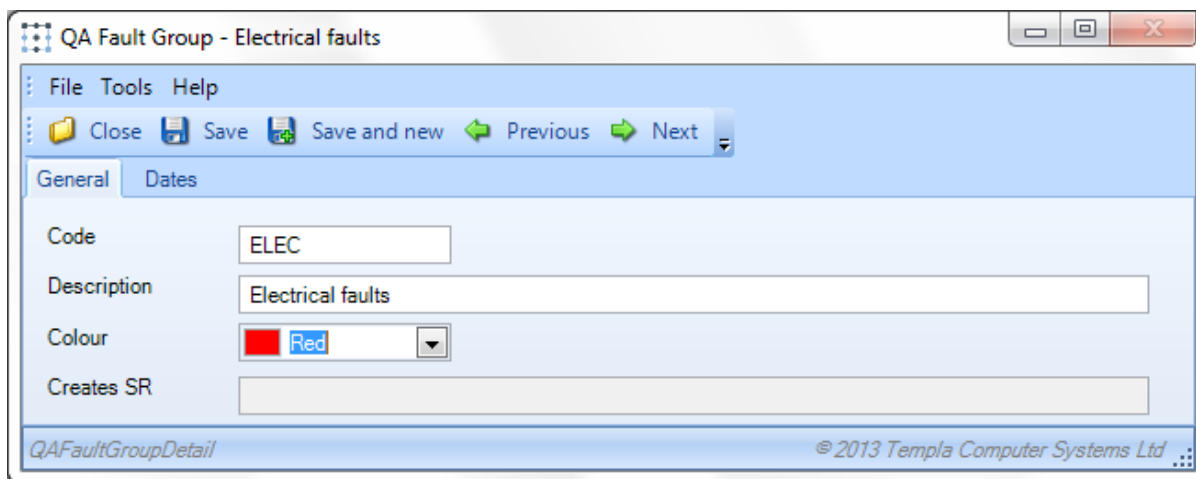
QA Fault Groups are assigned to **QA Fault codes** – these can be defined, for example:



The screenshot shows a table titled "QA Fault Groups" with the following data:

St Code	Description	Creates SR
ELEC	Electrical faults	
HS	Health and Safety	

GENERAL TAB



The screenshot shows the "QA Fault Group - Electrical faults" form with the following fields:

- Code: ELEC
- Description: Electrical faults
- Colour: Red (dropdown menu)
- Creates SR: (empty text box)

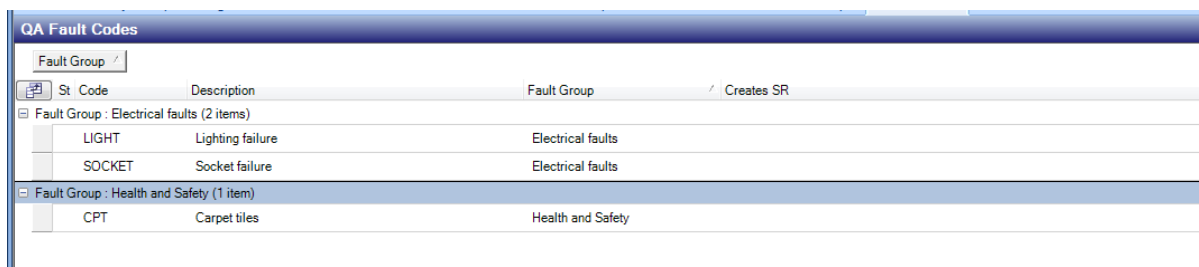
At the bottom of the form, it says "© 2013 Templa Computer Systems Ltd".

Colour – pick a colour appropriate to the fault group.

Creates SR – it is possible to create a **Service request** for any such flagged **QA items** for **Customer Services**.

QA Fault Codes

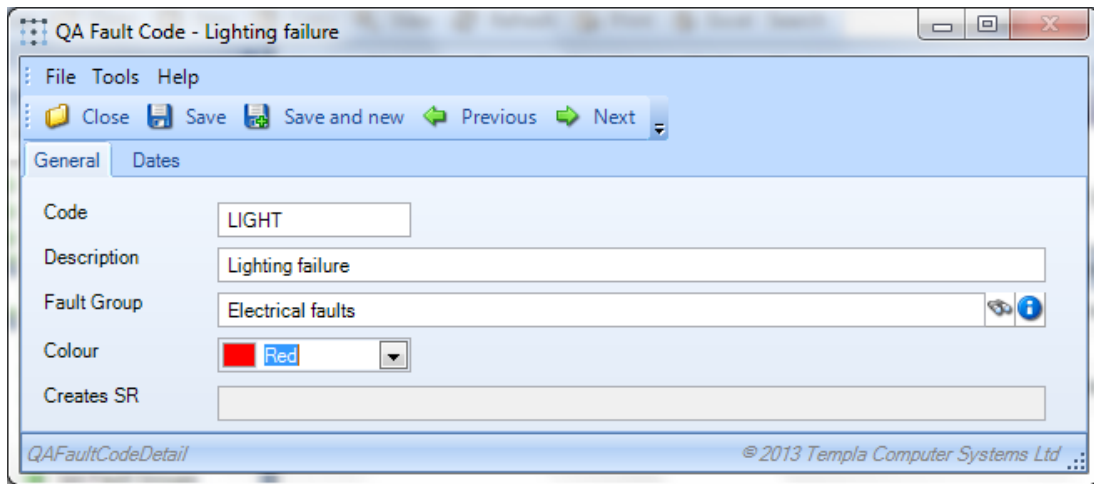
QA Fault Codes can be defined, for example:



The screenshot shows a table titled "QA Fault Codes" with the following data:

St Code	Description	Fault Group	Creates SR
Fault Group : Electrical faults (2 items)			
LIGHT	Lighting failure	Electrical faults	
SOCKET	Socket failure	Electrical faults	
Fault Group : Health and Safety (1 item)			
CPT	Carpet tiles	Health and Safety	

GENERAL TAB



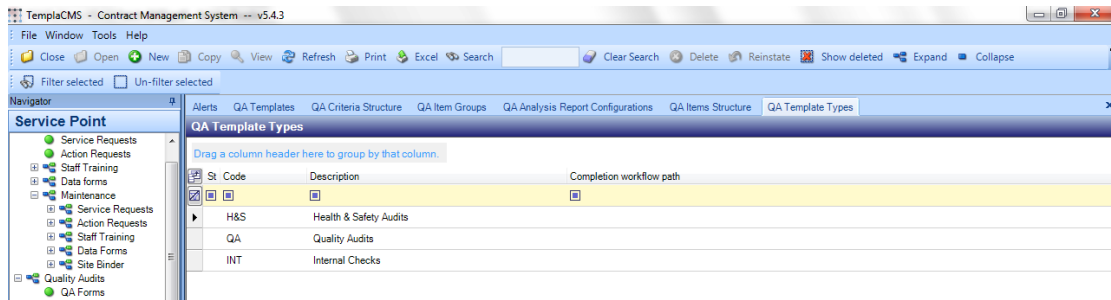
Fault Group – a **QA Fault Group** must be assigned to a **QA Fault Code**.

Colour – pick a colour appropriate to the fault group.

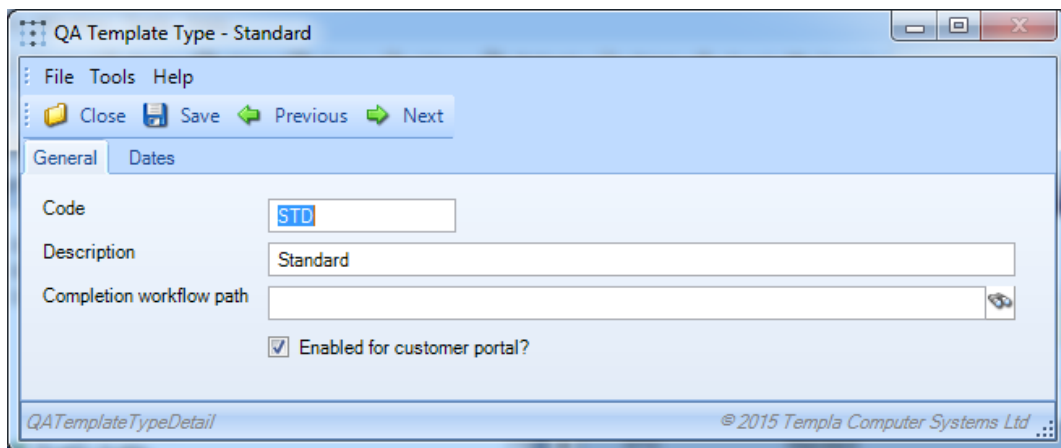
Creates SR – it is possible to create a **Service request** for any such flagged **QA items** for **Customer Services**.

QA Template Types

QA template types can be defined, for example:



GENERAL TAB

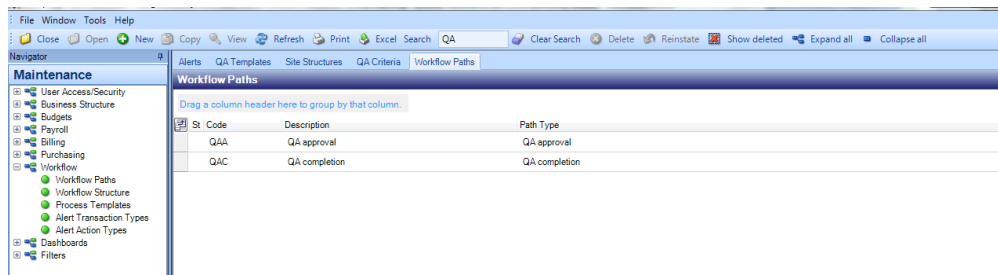


Completion workflow path – a separate workflow path can be optionally defined to control **QA form** assignment so that, for example, the Quality Audits could be completed by the contract/area managers and the Health & Safety Audits by the risk manager(s).

Enabled for customer portal? – this needs to be checked if **QA forms** for **QA templates** belonging to this **QA template type** need to be displayed on the Customer Portal

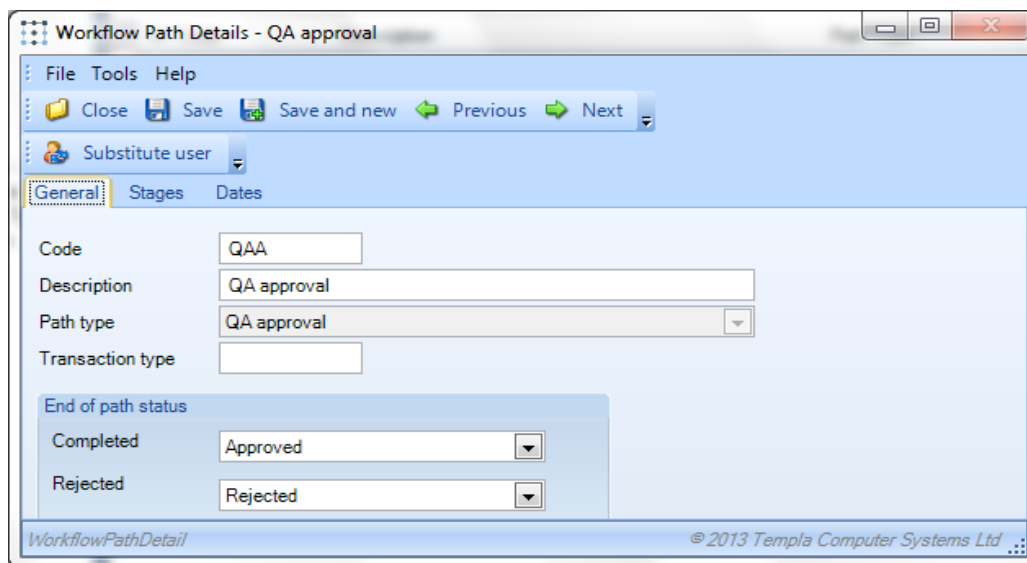
WORKFLOW

Two workflow paths should be defined to the system for controlling QA:

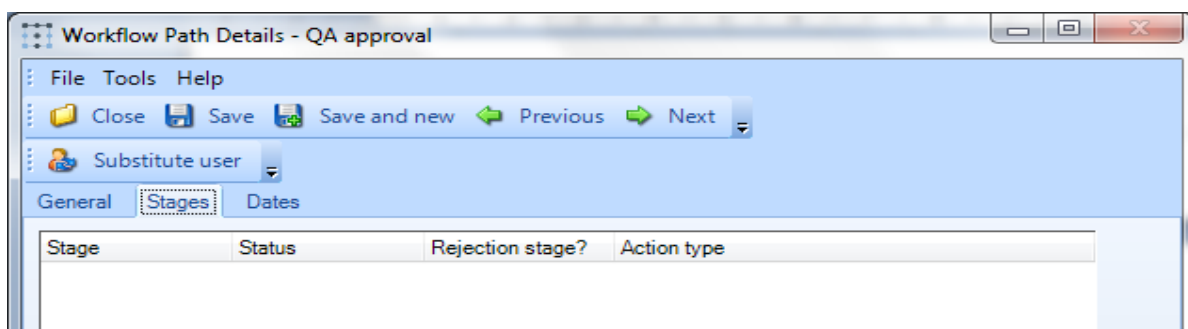


QA Approval

The **QA Approval** workflow path is only used for ad-hoc **QA forms** and, only then, based upon the System Control **Auto-approve one-off QA forms** checkbox.

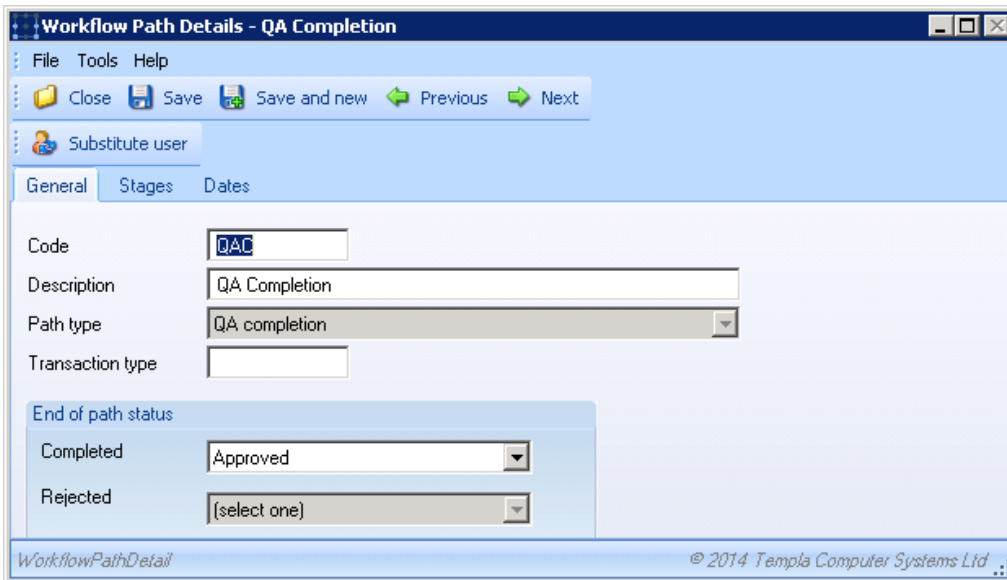


If **QA Approval** is not required, it should be setup with no stages, as follows:

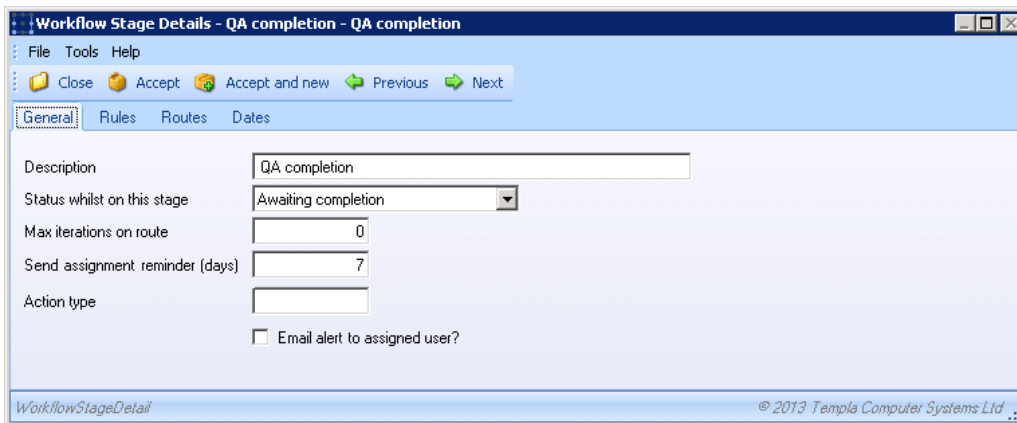


QA Completion

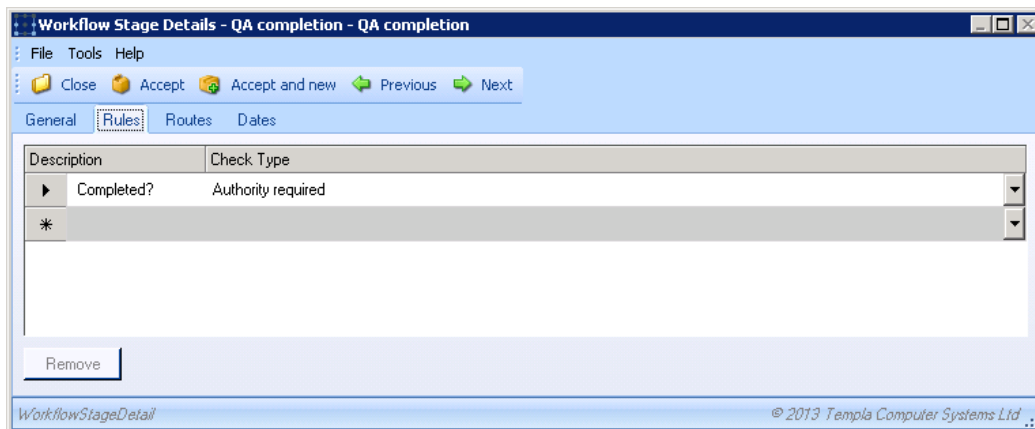
The **QA Completion** workflow path is only used for approving contracted **QA forms** created via the QA batch process and would normally be setup in a similar structure to the Timesheet Completion workflow path, as the same site/area/contract managers that complete the timesheets along with their regional/operation managers that signoff the timesheets, are likely to complete and signoff the Quality Audit respectively.



Thus, the status would be 'Awaiting Completion' whilst in the QAC workflow path:



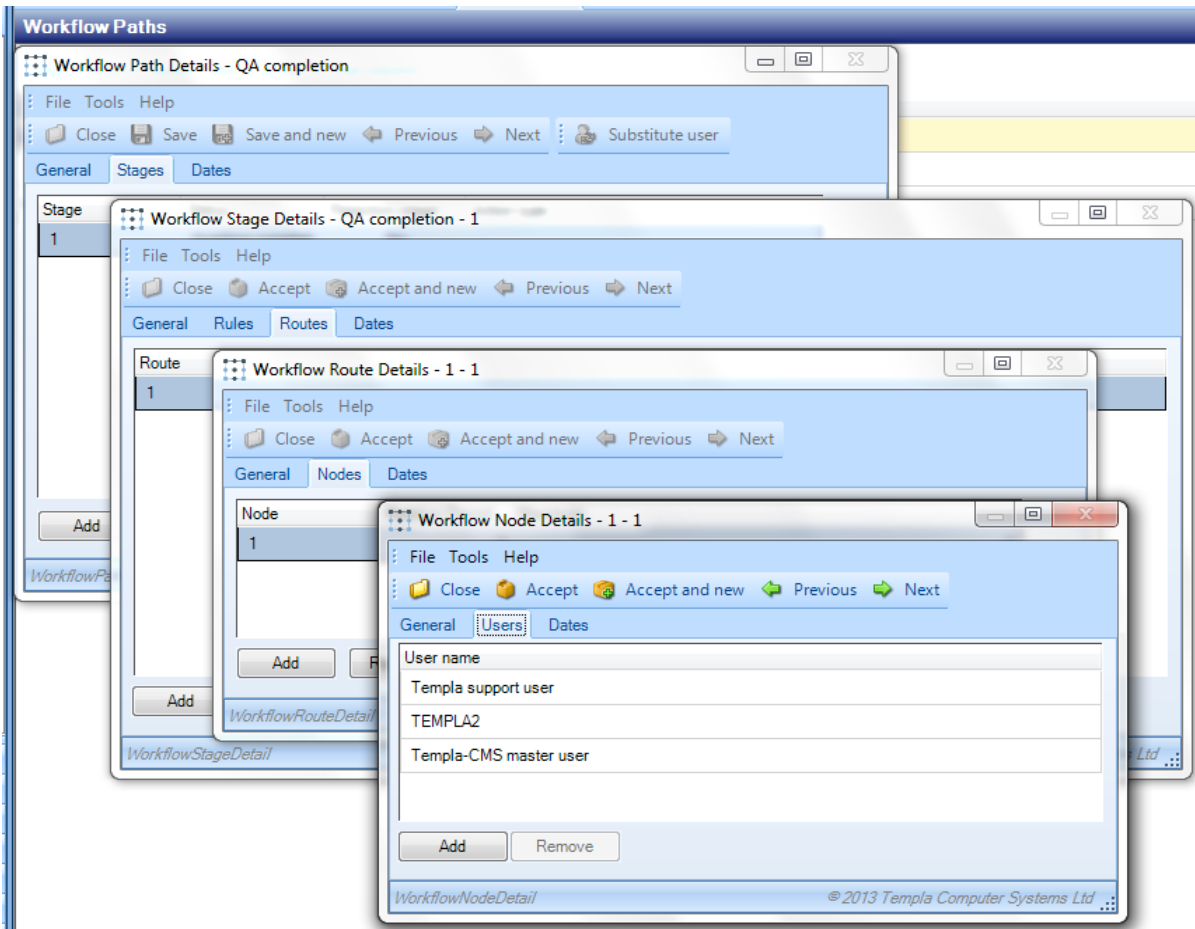
One rule would be defined:



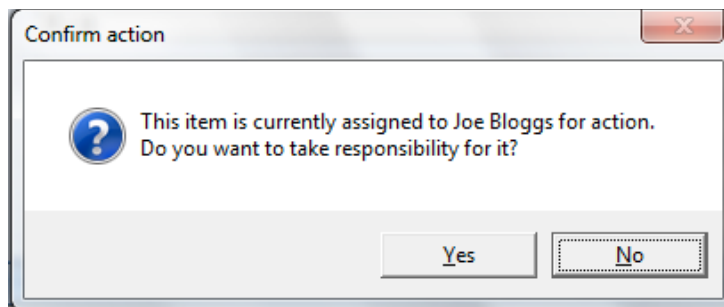
And then a list of routes, one per user, would be defined as per Timesheets.

MULTIPLE ASSIGNMENTS

The existing workflow maintenance allows an assigner user to be defined per **Node** on the Workflow Path's Stage's Route:



There is nothing to prevent multiple users being assigned here and if they are (as shown above) then, **within the main Templa-CMS package**, Workflow will assign QA forms to **one** of these users, depending on who is logged into Templa-CMS and how many un-actioned workflow items they have. However, **any user** within this node (i.e. "Workflow Pool") can access a QA form in order to update it and, if it is not currently assigned to them, can within TemplaCMS click on the **Amend** button which then prompts the following message:



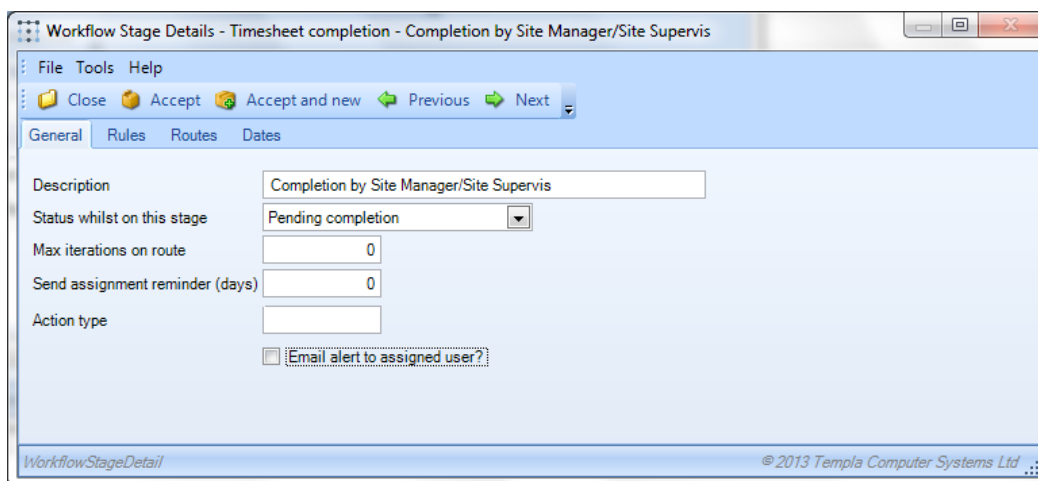
However, when multiple users are assigned to the same node, then within TemplaCMS any one of these users could be assigned the QA, yet any other of these users could complete it – this setup is fine when it does not matter who should be completing a QA from a pool of potential users. Alternatively, a **second node** could be added for users that can optionally complete a QA in place of the assigned user – in this scenario, Workflow will always assign the QA to the user on the first node but any users on any node can complete the QA – this setup is preferably when a single user should be completing the QA but occasionally their superior could want or need to be able to take control and complete it.

With regards to mobile devices the mobile device will allow **any user** within the Workflow Path's Node to update the QA form.

This means that a QA form *could* exist on multiple mobile devices for completion and thus, potentially, the same QA form could be completed more than once. However, this can only happen where both mobile devices have not synchronised since the QA form was first completed. Where the QA form has been completed on more than one mobile device, then the first mobile device to be synchronised will record the results on the main TemplaCMS system and any subsequently synchronised mobile devices would receive these results in place of their own results. Similarly, if the QA form is completed on the main TemplaCMS system (but not on any mobile device) then the mobile devices will receive these results when they next synchronise.

Workflow (QA) Reminders

When defining stages on the **Workflow path**, it is now possible to set a **Send assignment reminder (days)** and also flag the **Email alert to assigned user?**

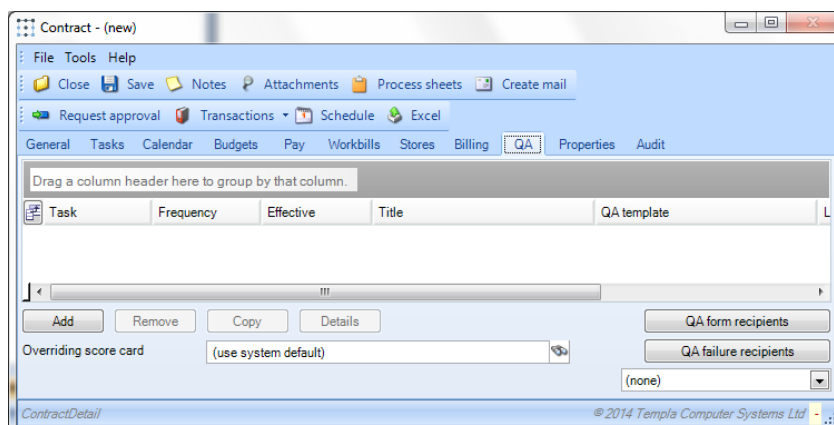


This facility could be used on any workflow stage for any workflow path but it was initially designed in order to send an (email) alert to the site/area/contract managers to remind them to carry out the Quality Audit. So, for example, if a Quality Audit is setup for completion within 10 days (see the Contract QA Details section below), a reminder could be sent out after 7 days – however, only those site/area/contract managers with incomplete Quality Audits would be receive this (emailed) alert reminder.

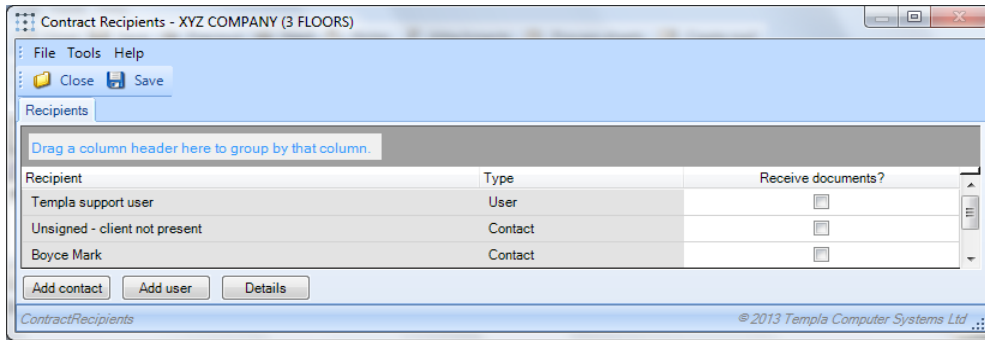
CONTRACTS

QA Tab

The **QA tab** within a contract displays all **QA details** to date. There may be multiple concurrent QA details, for example: standard **monthly** Quality Audit for the customer (that could optionally include an internal employee appraisal), **quarterly** Quality Audit check on any subcontractor work, **annual/periodic** Quality Audit check on the building per se, etc.



The **QA form recipient** and **QA failure recipient's** buttons provides a list of recipients for the emailing completed QA forms and the QA failures report respectively:



Overriding score card – a contract-specific **Score card** can be optionally associated with the contract.

Status (bottom right) – allows the **QA details** for this contract to be filtered, thus if **QA details** are agreed and setup annually, historical ones can be excluded from this view.

Quality Audits – using the **Quality Audit** button an operator can view a list of all **QA forms** for the contract (shown below) and, optionally, add a **One-Off** QA form:

Po	Di	C	Ty	QA number	Status	Assigned to	Scheduled date	Scheduled time	Contract	Site	Criteria	Frequency
				48	QA07 - Re-scheduled		01/02/2013 - 10/02/201		XYZ COMPANY (3 FL	THE MAIN OFFICE	Poor	1 Months
				49	QA07 - Re-scheduled		01/03/2013 - 10/03/201		XYZ COMPANY (3 FL	THE MAIN OFFICE	Poor	1 Months
				50	QA04 - Approved		08/03/2013		XYZ COMPANY (3 FL	THE MAIN OFFICE	Poor	One-off
				51	QA06 - Completed		08/03/2013		XYZ COMPANY (3 FL	THE MAIN OFFICE	Very goo	One-off
				52	QA04 - Approved		08/03/2013		XYZ COMPANY (3 FL	THE MAIN OFFICE		One-off
				53	QA01 - New		01/04/2013 - 10/04/201		XYZ COMPANY (3 FL	THE MAIN OFFICE		1 Months
				54	QA04 - Approved		31/05/2013		XYZ COMPANY (3 FL	THE MAIN OFFICE		One-off
				61	QA04 - Approved		31/05/2013		XYZ COMPANY (3 FL	THE MAIN OFFICE		One-off

QA details add

On using the **Add** button from the contract **QA tab** the following screen is displayed to enable Quality Audits to be scheduled/planned in the similar fashion to billing and workbills:

Effective dates – date range for the QA process which can be open-ended.

Suppress in non-working periods? – if checked, no **QA form** will be scheduled for completion during non-working periods based on the contract's **Site calendar**.

QA template – valid **QA template** must be selected.

Title – defaults from **QA template** but can be overridden.

Task – a valid task must be selected from the contract's tasks

Basis/Frequency/Count – options here for **basis** are:

- **Scheduled** – the **frequency** options work just like billing and workbills
- **Random** – spreads the QA process but not evenly, e.g. **frequency** could be 1 Year but the **count** (which only appears when **random** is selected) could be 8 in which case 8 Quality Audits would be carried out over a year

Score flex – the scores for a particular site can be optionally flexed, e.g. if a customer has a chain of stores then perhaps its Oxford Street branch is deemed to be its flagship site and therefore demands special attention during the cleaning and QA process.

Schedule details – specific times or more generic timeslots can be defined here

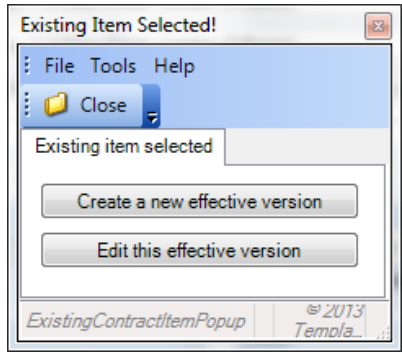
Days to complete – the number of days from start of the frequency period (e.g. 1 month) that the site/area/contract manager has to complete the Quality Audit

Suspend – allows QA process to be suspended in a similar manner to billing and workbills

Dates – last and next QA dates can be optionally set (or overridden) here

QA details amend

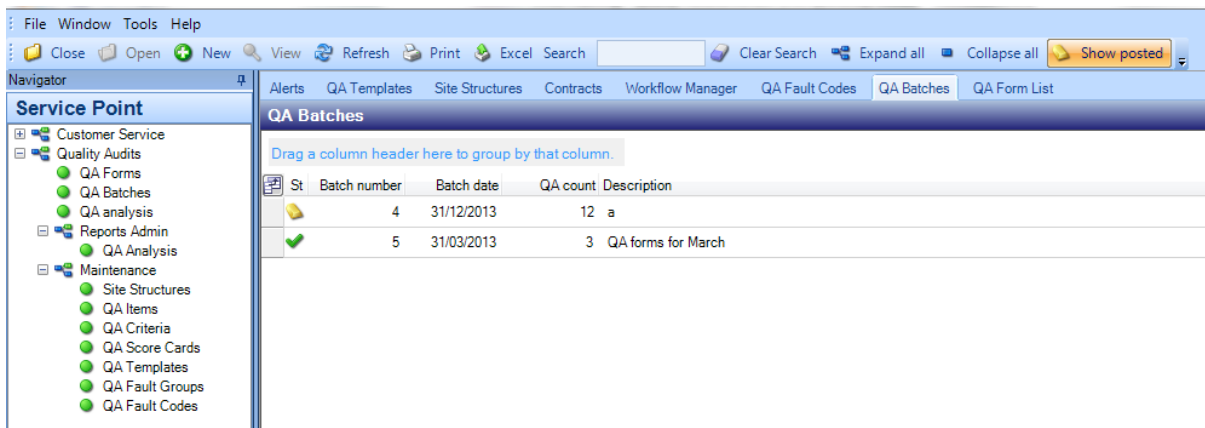
On amending any existing **QA details**, the following screen is displayed, as elsewhere:



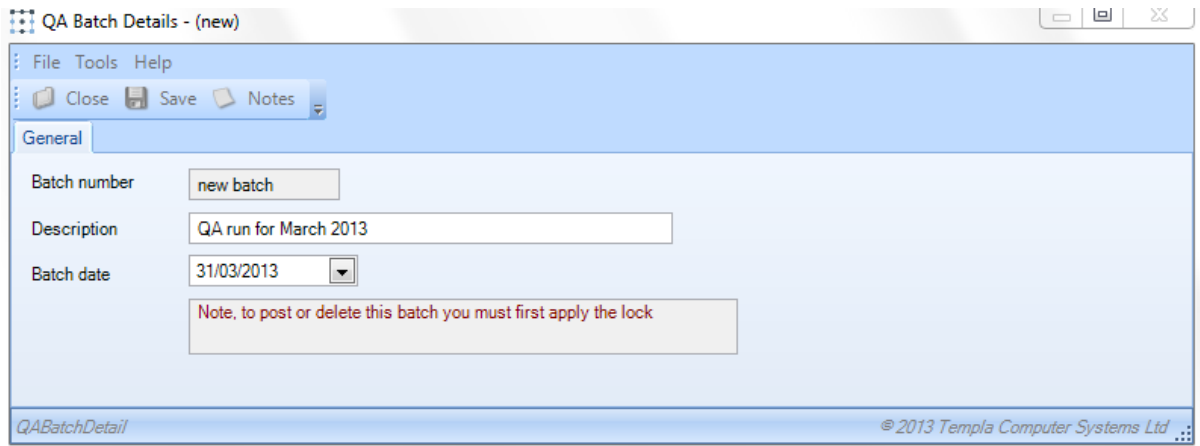
QA PROCESSING

QA Batches

QA batches and **QA forms** relate to each other in the same way as other areas of the system (e.g. Payroll batches and timesheets, Invoice batches and invoices, etc.) so that a **QA batch** generates the **QA forms** that are to be completed.

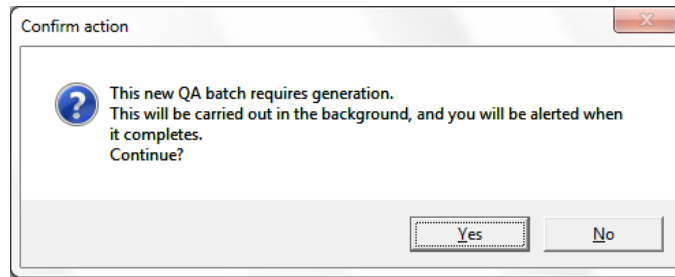


QA BATCH DETAILS – GENERATE

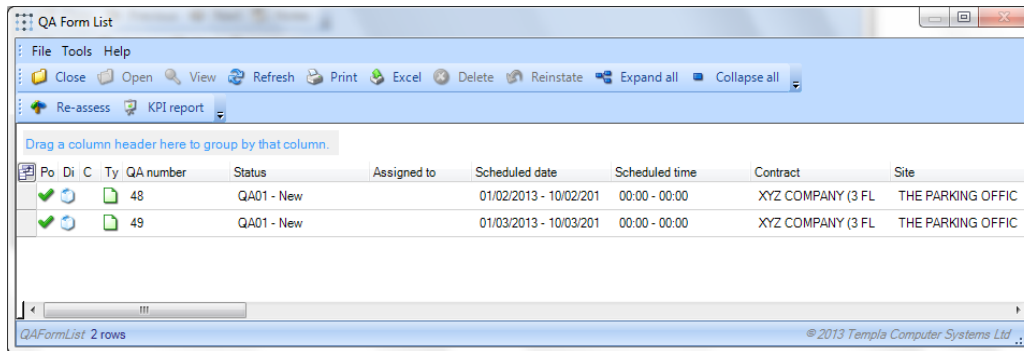


Batch date – this is used to determine which contract’s **QA details** should be pulled into the current **QA batch**, based on the last **QA date** and the **frequency** and **count**.

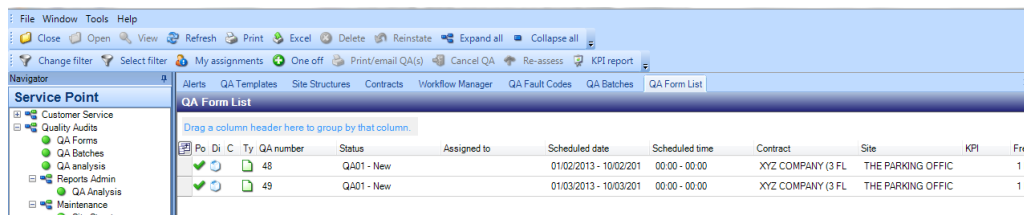
On pressing **Save** the following message is displayed – **Yes** will result in the **QA forms** being created for this **QA batch**:



This will **generate** the QA forms to status **QA01 - New**; the generated **QA forms** can then be reviewed before being posted, either by re-entering the **QA batch** to use the **QA** button:

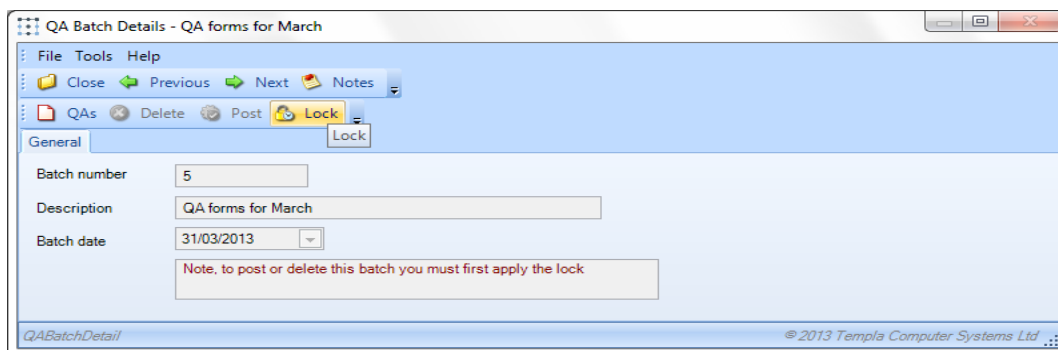


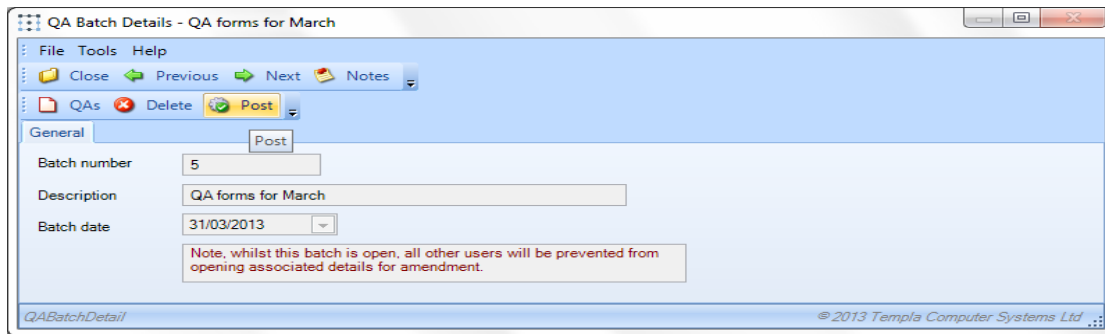
Alternatively, the **QA forms** menu option can be used in conjunction with the **Change filter** button to display all **QA forms** or to filter them accordingly:



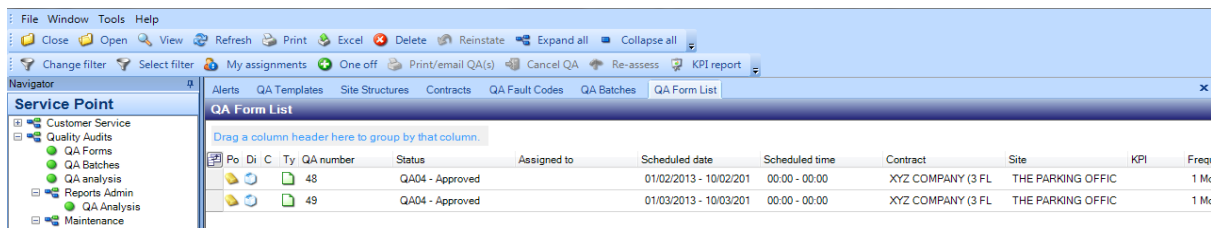
QA BATCH DETAILS – LOCK & POST

Once the **QA forms** have been reviewed (i.e. internally by the Customer Service department) the **QA batch** should be locked and then posted, as follows:





This will result in the QA forms status being changed from **QA01 - New** to **QA04 - Approval** and QA forms being assigned (if workflow is setup) the relevant site/area/contact manager:



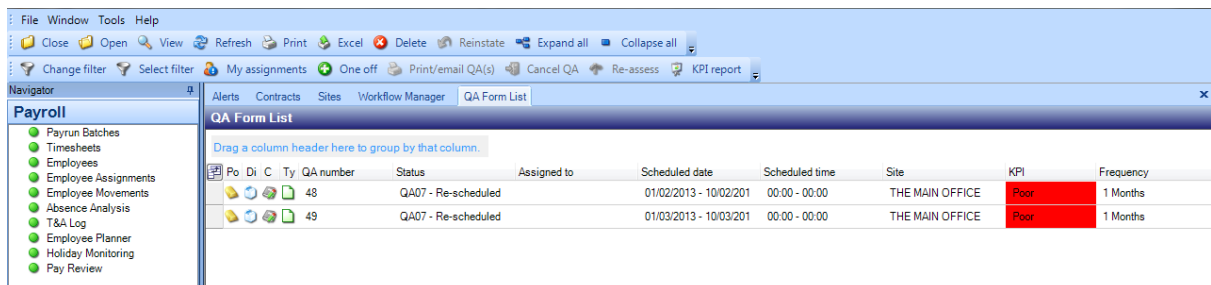
This also results in the **Next QA Date** on the **QA template** on the contract being advanced.

Please note: un-posting a QA Batch will not roll the 'Next QA Dates' back

QA Forms List

As noted above, **QA forms** can still be accessed either from within the **QA batch** via the **QA** button or from the **QA forms** menu option which is the option the site/area/contract managers will use.

OPTIONS



The following buttons are available from the **QA forms list**:

- *My assignments* – subsets the list to show just those QA forms assigned to oneself
- *One-off* – see relevant section below
- *Print/email QA(s)* – prints/emails the QAs (see relevant section below)
- *Auto email to recipients* – emails selected completed QAs to their QA recipients
- *Cancel QA* – allows a QA form to be cancelled
- *Re-assess* – re-assesses all QA forms (in the subset list) so that if the **QA criteria** have changed (e.g. **Good** was >80% but now >70%) there would be a need to **re-assess** all **QA forms** associated with the **QA criteria**
- *Criteria reports* – see **Reporting** section

Most of the above options are also available from within the **QA form** too.

TYPES

QA forms can be one of several types:

- *Normal* – non site location QA form
- *One-Off* – one-off QA form
- *Repeat* – auto-generated QA form from a QA failure
- *Master* – site location ‘master’ QA form
- *Location* – site location building/room level completed QA form

SUMMARY TOTALS

In addition to the normal grouping and sorting options, extra columns exist on the QA list to provide summary totals when grouping, be that by year/month, area manager, status, etc.

Year	Po	Di	C	Ty	QA number	Status	QA count	Completed QA	Avg QA K	Completed QA %	Repeat count	Completed rep	Avg rep	Completed rep	One-off cou	Completed on	Avg one-o	Completed one
2011							22		0.00	0.00%			0.00	0.00%			0.00	0.00%
2012							47		0.00	0.00%			0.00	0.00%			0.00	0.00%
2013							64	2	4.59	3.13%	11	3	32.50	27.27%	6	2	50.00	33.33%
01							4		0.00	0.00%			0.00	0.00%			0.00	0.00%
02							5		0.00	0.00%			0.00	0.00%			0.00	0.00%
03							7	2	4.59	28.57%	2	1	97.50	50.00%	1		0.00	0.00%
					32	QA05 - Awaiting completi		1	0.00	0.00%			0.00	0.00%			0.00	0.00%
					43	QA04 - Approved			0.00	0.00%	1		0.00	0.00%			0.00	0.00%
					44	QA04 - Approved			0.00	0.00%			0.00	0.00%	1		0.00	0.00%
					48	QA07 - Re-scheduled	1	1	4.29	100.00%			0.00	0.00%			0.00	0.00%
					49	QA07 - Re-scheduled	1	1	4.88	100.00%			0.00	0.00%			0.00	0.00%
					184	QA05 - Awaiting completi	1		0.00	0.00%			0.00	0.00%			0.00	0.00%
					208	QA05 - Awaiting completi	1		0.00	0.00%			0.00	0.00%			0.00	0.00%
					232	QA05 - Awaiting completi	1		0.00	0.00%			0.00	0.00%			0.00	0.00%
					264	QA05 - Awaiting completi	1		0.00	0.00%			0.00	0.00%			0.00	0.00%
					51	QA06 - Completed			0.00	0.00%	1	1	97.50	100.00%			0.00	0.00%
04							6		0.00	0.00%			0.00	0.00%			0.00	0.00%
05							6		0.00	0.00%	3		0.00	0.00%			0.00	0.00%
06							7		0.00	0.00%	2	2	0.00	100.00%	4	2	50.00	50.00%
07							6		0.00	0.00%			0.00	0.00%			0.00	0.00%
08							19		0.00	0.00%	2		0.00	0.00%	1		0.00	0.00%
09							1		0.00	0.00%	2		0.00	0.00%			0.00	0.00%
10							1		0.00	0.00%			0.00	0.00%			0.00	0.00%
11							1		0.00	0.00%			0.00	0.00%			0.00	0.00%
12							1		0.00	0.00%			0.00	0.00%			0.00	0.00%
							133	2	4.59	1.50%	11	3	32.50	27.27%	6	2	50.00	33.33%

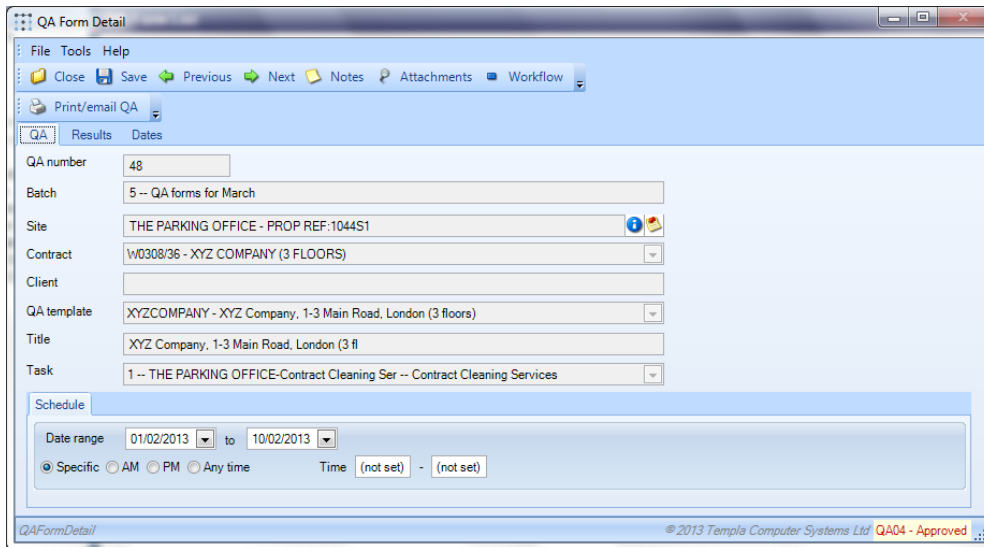
Thus, the following columns exist for this purpose:

- *QA count / Repeat count / One-off count* – this will be set to 1 for every scheduled, repeat or one-off QA form respectively, shown in the list
- *Completed QA count / Completed Repeat count / Completed One-off count* – this will be set to 1 on completed scheduled, repeat and one-off QA forms respectively
- *Completed QA % / Completed Repeat % / Completed One-off %*, i.e. the completion % of QA forms completed, i.e. Completed QA count / QA Count
- *Average QA KPI / Average Repeat KPI / Average One-off KPI* – the average KPI

QA Forms

QA FORM DETAIL – QA TAB

Double-clicking on the **QA form** will display the **Results tab** by default if **QA form** is posted or else the initial **QA tab** if the **QA form** has yet to be posted, as follows:



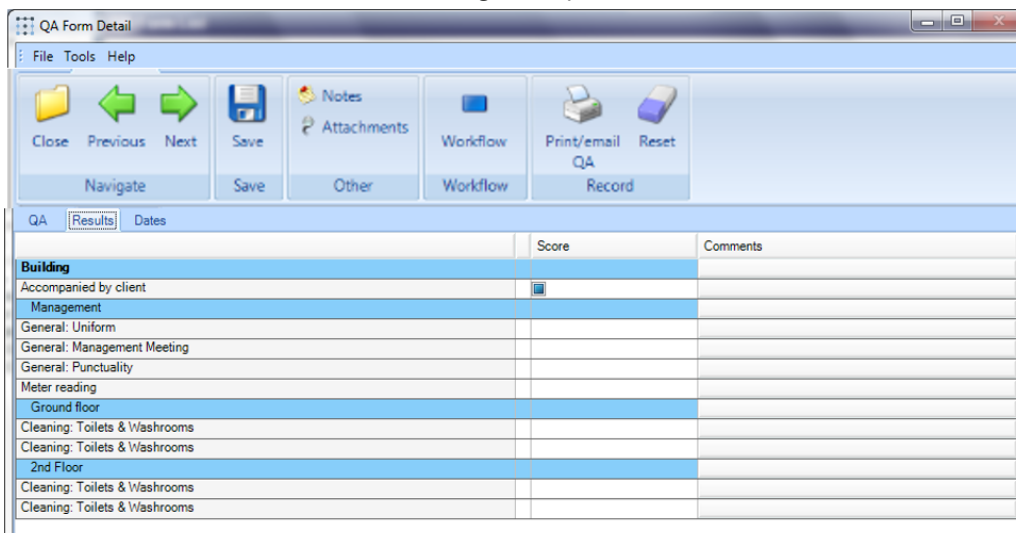
Schedule – the **QA form Schedule details** can be overridden at this point; this might be undertaken by the internal customer service team prior to approval in order to (re-)schedule the site/area/contract manager’s Quality Audits most effectively.

NB: someone at ‘head office’ will need to monitor and oversee the Quality Audit schedule to ensure that it is scheduled appropriately/realistically and actioned on-time.

QA FORM DETAIL – RESULTS TAB (NEW)

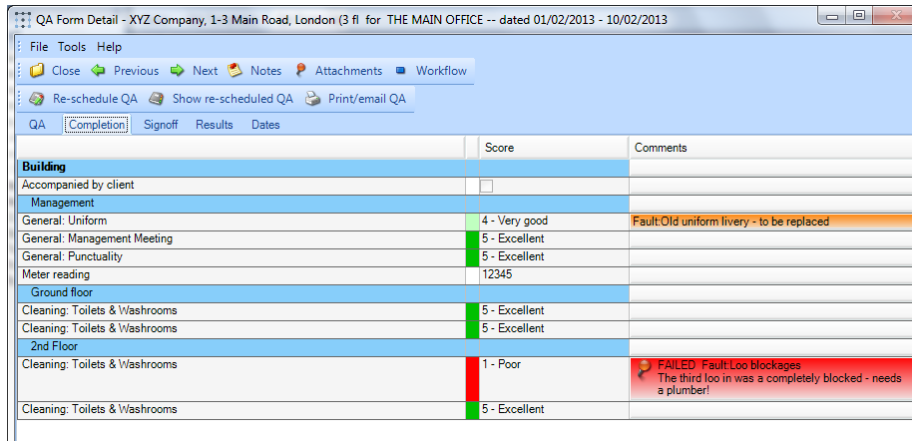
The **Results** tab is the actual **Quality Audit** – thus, the site/area/contract manager needs to complete or score each area displayed. In the example below, note:

- *Accompanied by client* – the checkbox appears at the top
- *Meter reading* – the numeric field appear under the management area, although this could have been placed on the appropriate floor, if known
- *2nd Floor* – the first, second and third floor were all flagged to be audited once in every three audits (i.e. **QA template**, area property, include ratio 1:3) and, as such, the second floor has been selected to be audited on this occasion
- *Reset* – this clears all scores from an existing incomplete QA form



A FORM DETAIL – RESULTS TAB (COMPLETED)

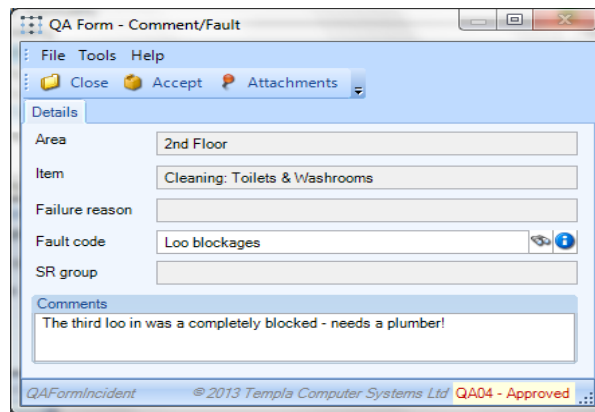
The site/area/contract manager might complete the **Quality Audit** as follows:



	Score	Comments
Building		
Accompanied by client	<input type="checkbox"/>	
Management		
General: Uniform	4 - Very good	Fault: Old uniform livery - to be replaced
General: Management Meeting	5 - Excellent	
General: Punctuality	5 - Excellent	
Meter reading	12345	
Ground floor		
Cleaning: Toilets & Washrooms	5 - Excellent	
Cleaning: Toilets & Washrooms	5 - Excellent	
2nd Floor		
Cleaning: Toilets & Washrooms	1 - Poor	FAILED: Fault: Loo blockages The third loo in was a completely blocked - needs a plumber!
Cleaning: Toilets & Washrooms	5 - Excellent	

Score – all QA items must be scored and any other information actioned

Comments – any failures will force the operator to double-click the row in order to enter some comments, plus optionally add a **QA fault code** and attach a photograph of the defect via the **Attachments** button:



QA Form - Comment/Fault

File Tools Help

Close Accept Attachments

Details

Area: 2nd Floor

Item: Cleaning: Toilets & Washrooms

Failure reason:

Fault code: Loo blockages

SR group:

Comments

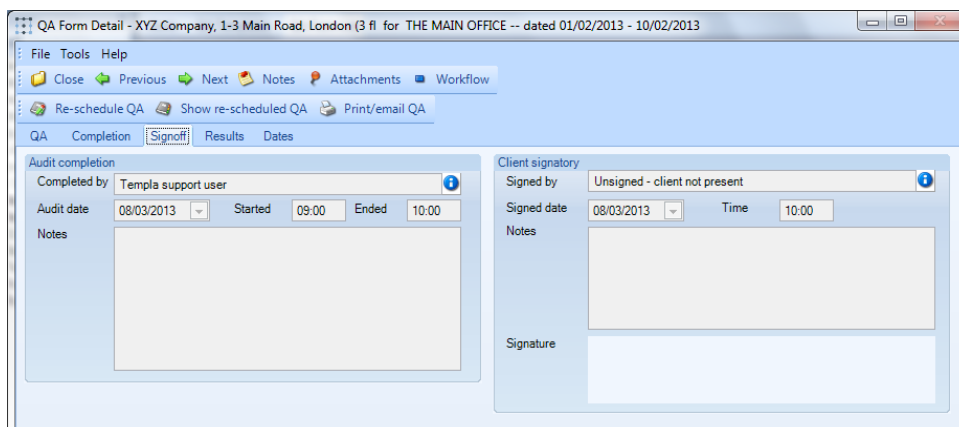
The third loo in was a completely blocked - needs a plumber!

QAFormIncident © 2013 Templa Computer Systems Ltd QA04 - Approved

Indeed comments, **QA fault codes** and pictures can be added to any rows, if required, not just those rows flagged up as a failure. Comments can also be added at **QA area** level, if required, although this does not affect the scoring but could alert customers to any issues, e.g. loose carpet tile on the 2nd floor, ground floor reception needs a replacement fluorescent lighting strip, etc.

QA FORM DETAIL – SIGNOFF

The signoff details appear on a separate **Signoff** tab:



QA Form Detail - XYZ Company, 1-3 Main Road, London (3 fl for THE MAIN OFFICE -- dated 01/02/2013 - 10/02/2013)

File Tools Help

Close Previous Next Notes Attachments Workflow

Re-schedule QA Show re-scheduled QA Print/email QA

QA Completion Signoff Results Dates

Audit completion

Completed by: Templa support user

Audit date: 08/03/2013 Started: 09:00 Ended: 10:00

Notes:

Client signatory

Signed by: Unsigned - client not present

Signed date: 08/03/2013 Time: 10:00

Notes:

Signature:

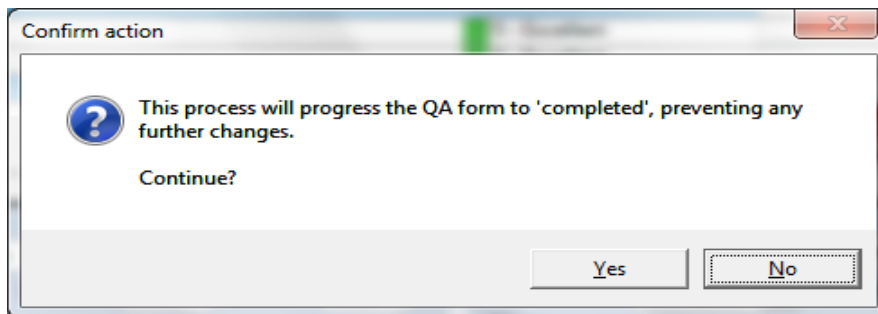
Audit completion – the site/area/contract manager that carried out the **Quality Audit** must complete this section and adding any relevant notes; these site/area/contract managers must therefore be setup in Templa-CMS as **users**.

Client signatory – the site/area/contract manager that carried out the **Quality Audit** must complete this section even if the client did not accompany him/her during the audit in which case an ‘Unsigned’ customer contact must be selected, as above; there is no check or link between this ‘Unsigned’ contact and the ‘Accompanied by client’ checkbox. If the signature has been captured on the CMS mobile device, this will now be displayed here.

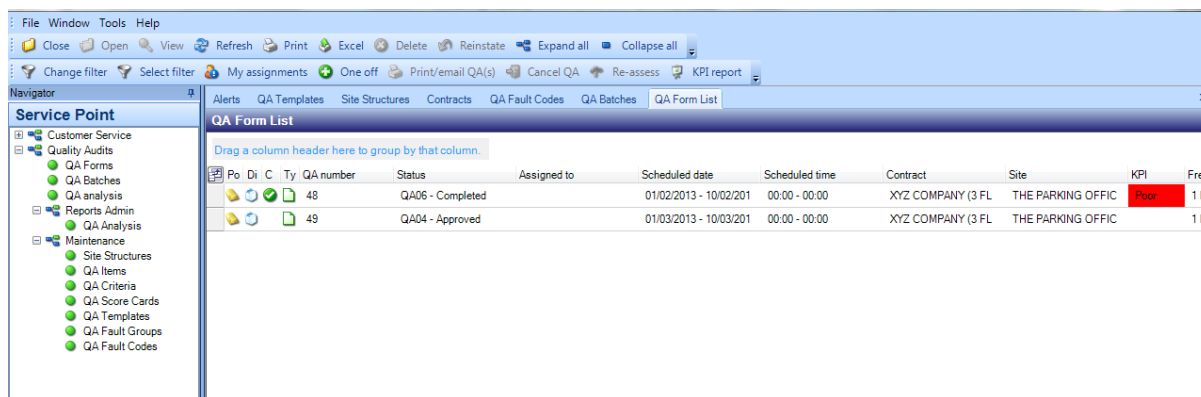
NB: it is likely that an “Unsigned” contact might be required for all customers

Only once all scores and all other entries have been entered, plus comments added for any failures, plus the footer audit completion and client signatory sections completed, will the **Send On or Complete** button be displayed at the top of the screen.

When the **Complete** button is pressed the following prompt will be displayed:



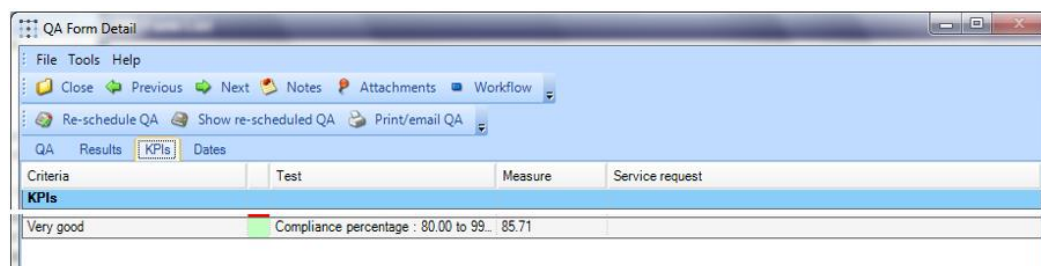
On pressing **Yes** the **QA form** will have its status updated to **QA06 - Completed** and has been measured based on the **QA criteria** assigned to the **QA template** (as **KPI's**) used on this QA form.



If the **QA template** to which this **QA form** is associated, is flagged for *auto-email*, the completed QA form will also be automatically emailed out at this point.

QA FORM DETAIL – KPIS TAB

On re-entering this completed QA form, a new **KPIs** tab is now available to view:



NB: where a single site has multiple QA criteria to meet in a single month, it is always the last one that shows in the KPI report. This means if there is a failure followed by corrective

action and re-audit, the re-audit will hide the original failure thus making the company look good when reporting back to the customer

QA FORM DETAIL – PRINT/EMAIL

QA forms can be printed or emailed before and after the QA has been carried out so that the customer can receive details beforehand of what is to be audited and afterwards on what has been audited with the results:

Quality audit - XYZ Company, 1-3 Main Road, London (3 fl)			
	Score	Comments	
Building			
Accompanied by client	False		
Management			
General: Uniform	4 - Very good	Fault:Old uniform livery - to be replaced	
General: Management Meeting	5 - Excellent		
General: Punctuality	5 - Excellent		
Meter reading	12345		
Ground floor			
Cleaning: Toilets & Washrooms	5 - Excellent		
Cleaning: Toilets & Washrooms	5 - Excellent		
2nd Floor			
Cleaning: Toilets & Washrooms	1 - Poor	FAILED Fault:Loo blockages The third loo in was a completely blocked - needs a plumber!	
Cleaning: Toilets & Washrooms	5 - Excellent		
Criteria			
Criteria	Test	Measure	Service request
KPIs			
Poor	Average score : 0.00 to 39.99	4.29	
Very good	Compliance percentage : 80.00 to 99.00	85.71	

There are a number of **QA form 'print formats'** available (see QA templates above) where the second:

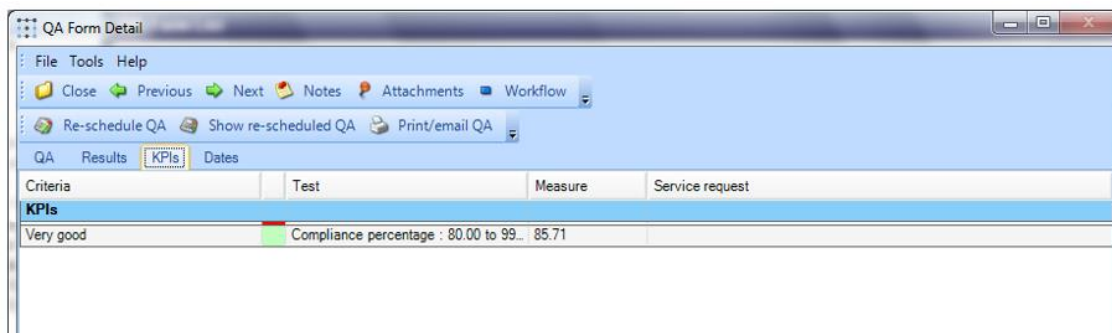
- The customer service address, phone and email details are printed top right on a **QA form** under the QA form logo (see Datasources above); where no details are entered (because they are one and same as the main customer address) then these details will be retrieved from the accounts system.
- The **Next QA date** has been added to the footer section – this is the next **QA date** at the time of printing and therefore, if a QA form is reprinted at a later time, the next **QA date** will potentially be different
- Client and task codes and descriptions have been suppressed
- Contract code and description are suppressed when they match the site code and description
- A 'footer section' will be printed if a relevant image file exists in the image path defined in System Control > General tab (see above)

QA – New Print Format (Format 4)

Format 4 is based upon format 3 but displays the Title as '**Quality Audit - SITE NAME**', the footer logo has been removed, thus allowing more QA items to be printed, the 'Completed by' name format has been changed, it now displays as (First name Surname).

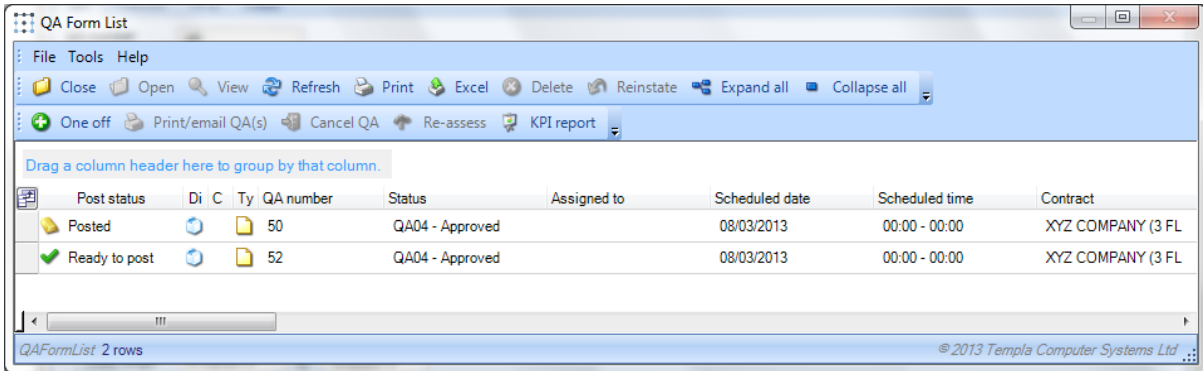
RE-SCHEDULE QA

If a Quality Audit uses a **QA template** that has any **QA criteria** flagged as **Auto-reschedule QA form** (regardless of whether this is deemed a failure or not) then this Quality Audit will be automatically re-scheduled upon completion; alternatively, this Quality Audit can be manually rescheduled using the **Re-schedule QA** button:



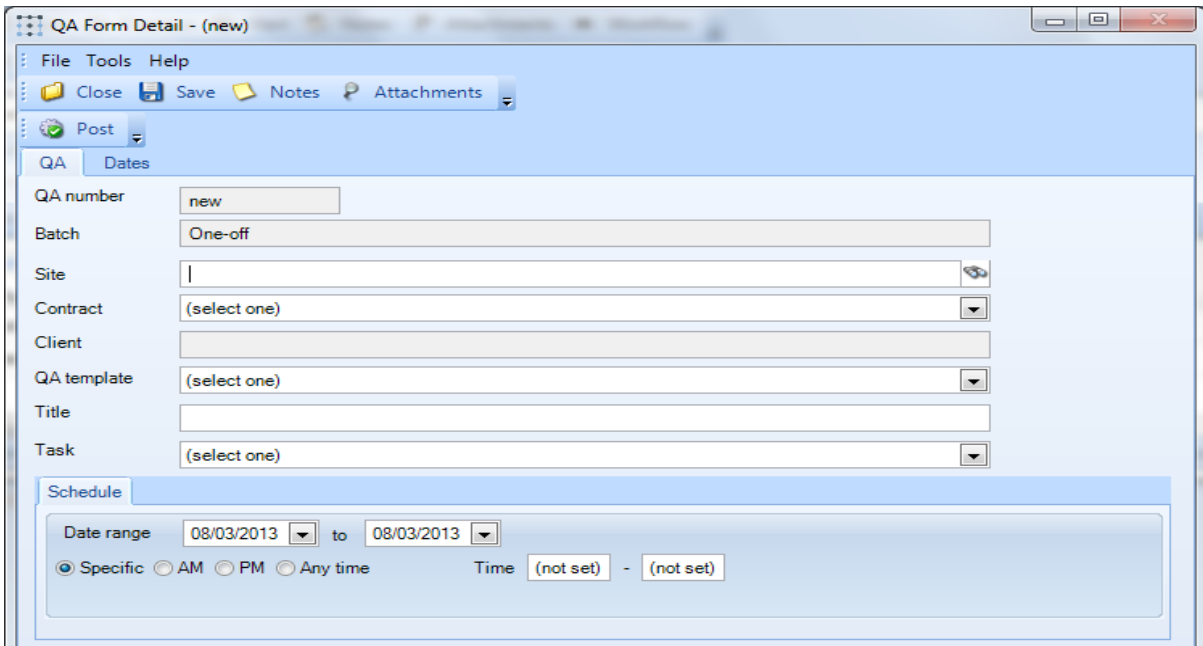
SHOW RE-SCHEDULED QA

If a Quality Audit has failed and has been automatically or manually rescheduled, then on re-accessing the **failed QA form** (which will have a status of **QA07 - Re-scheduled**) the **Show re-scheduled QA** button will display any re-scheduled QA details relating to the failed QA:



ONE-OFF (QA FORMS)

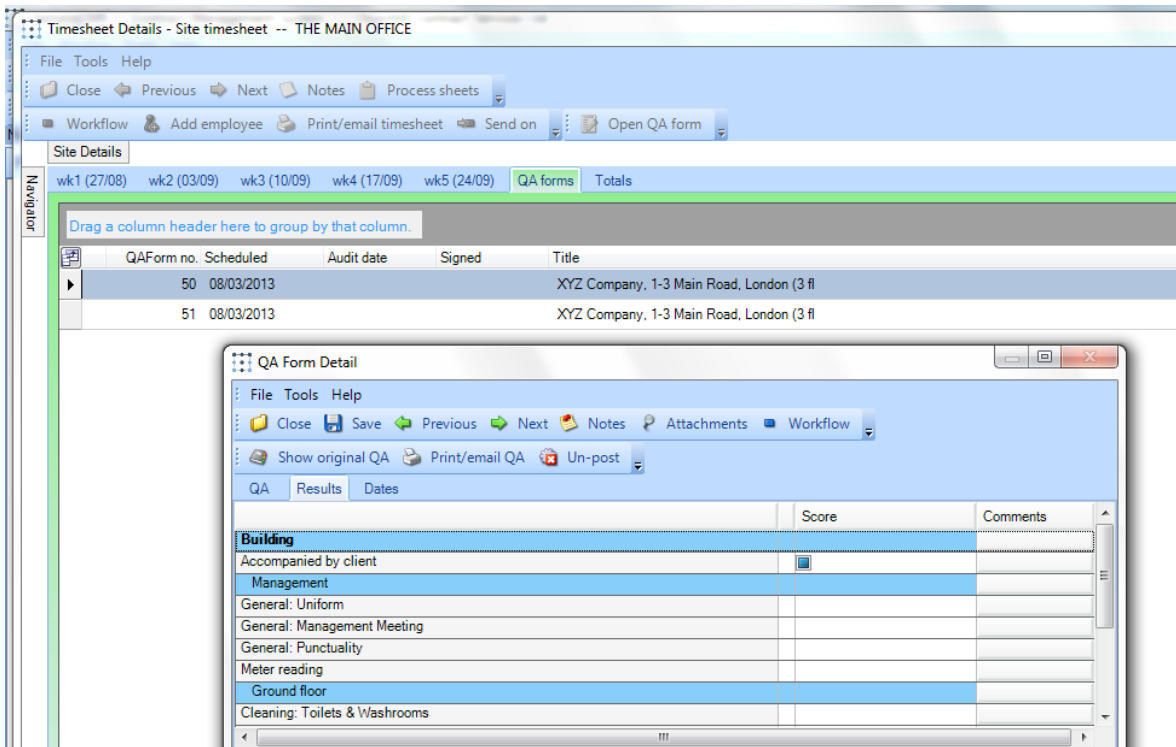
Via the **QA forms list** menu option or via the **QA form list** displayed from within a **QA form** (e.g. via the **Show re-scheduled QA** button) it is possible to add **One-off** (QA forms), similar to the one-off Workbill process. This prompts the following **QA form detail** screen:



One-offs may be raised and scheduled as the result of a previous failure or might result from the customer getting in contact with their site/area/contract manager to specifically request one. However, often one-offs are entered on to the system retrospectively, i.e. the site/area/ contract manager is alerted to an issue (by the customer complaining or by their cleaning staff) and decides to carry out an ad-hoc unplanned **Quality Audit** on the spot which is then subsequently entered on to the system.

QA FORMS – COMPLETION VIA TIMESHEETS

QA forms can also be completed via the normal timesheet process for the site/area/ contract manager to complete along with the timesheets; they appear as an extra tab from which an item can be selected and opened using the **Open QA form** button:



LOCATIONS

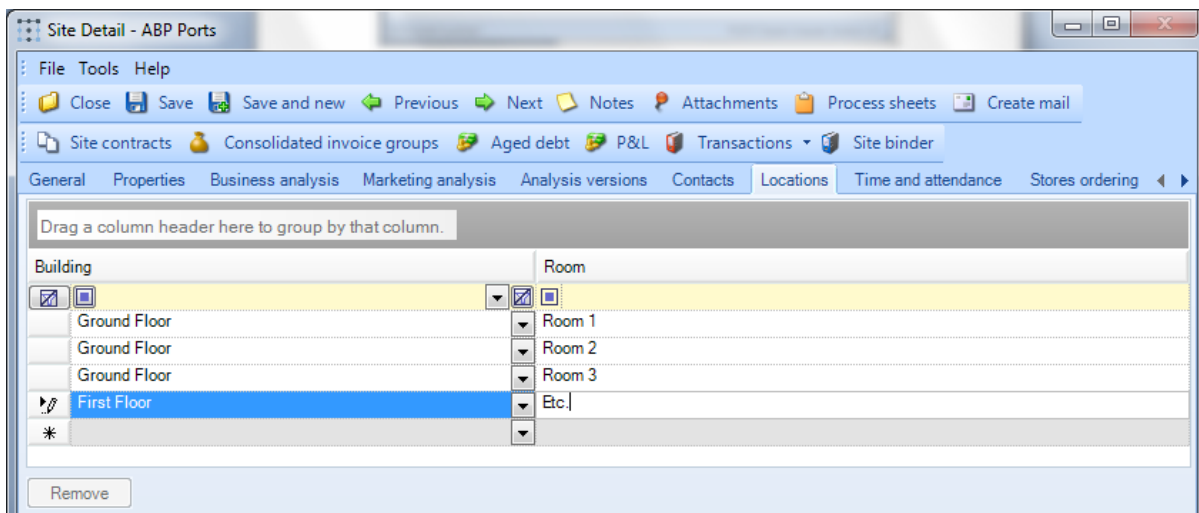
Site locations provides a further level of complexity when designing and completing **QA forms**. As such, in the TemplaCMS client/site structure, there is a level below site to enable actual locations within a site to be defined (e.g. buildings/areas and their rooms) where a common **QA template** would apply.

Sites

A **Locations** tab on **Sites**, will only be available if the user is authorised to the relevant functions:

- Site – Amend Locations
- Site – View Locations

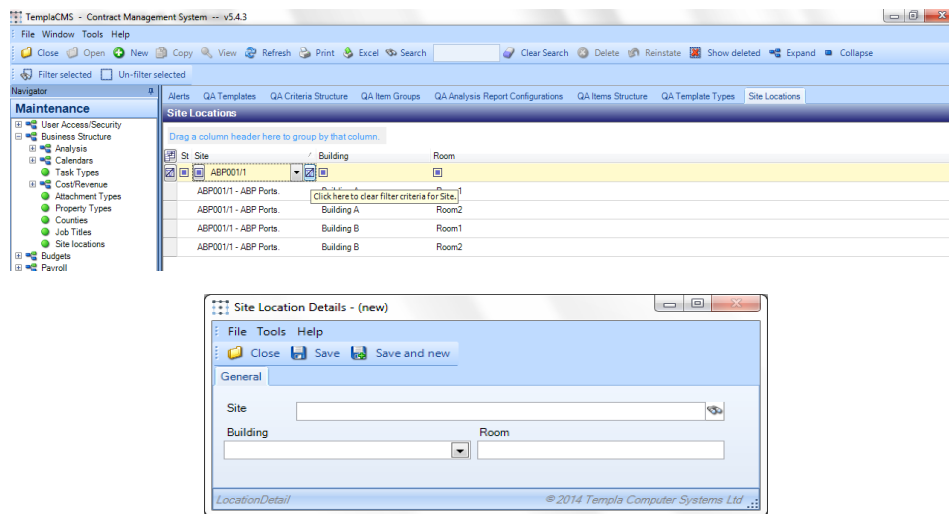
This allows buildings/areas and their rooms to be defined as shown below:



Once a building/area has been entered, the system allows easy re-selection of the same building/area on subsequent rows.

Site Locations

Alternatively, this same information can be viewed and maintained centrally via the **Maintenance > Business Structure > Site locations** option which also allows the normal grid grouping and filtering facilities:



QA Templates

As noted above, when defining a **QA template**, if the **Complete by Site location?** checkbox is checked, the user will be prompted with a list of sub-locations when completing a **QA form**, be that on the main TemplaCMS system or the mobile device.

QA Form Completion

When completing a **QA form**, if its **QA template** is checked for **Complete by Site location?** then:

- A **copy** of the QA form will be built which will initially force the auditor to select the location and sub-location – the initial QA form created thus acts a ‘master’ for all the QA forms built from it
- On the completion screen, the % of sub-locations audited to date for the site will be displayed

Once completed, the copy of the **QA form** will be marked as completed but the existing ‘master’ **QA form** will remain for the next audit to occur. After the auditor has audited the last location, there is an option to **Finalise** the ‘master’ **QA form** to prevent any further audits being generated from it; on the main TemplaCMS system there is also the option to **Un-finalise**.

The QA forms lists allows QA forms to be grouped by ‘type’, i.e. normal and one-off for QA forms whose QA template is not checked for ‘Complete by Site location?’ or master and location for QA forms whose QA template is checked. From master or location QA forms there is also the option to **Show Room QAs**.

New Locations

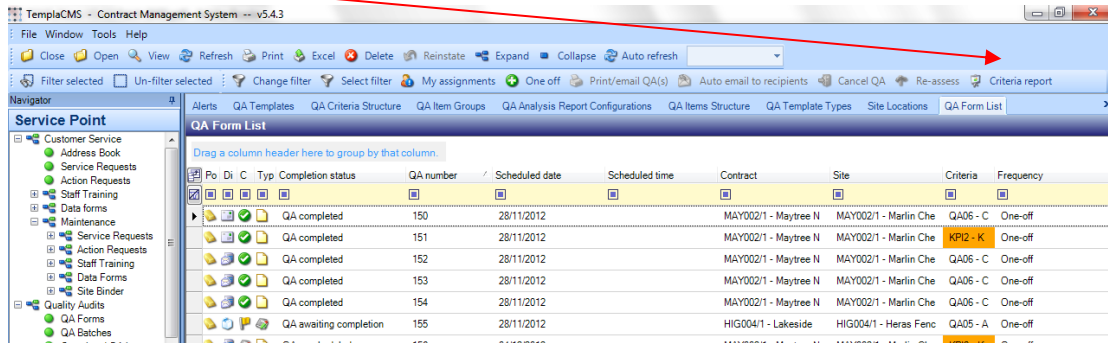
When completing a **QA form** it is sometimes required for a new sub-location and even location to be entered on-the-fly by the auditor (on the mobile device or on the main TemplaCMS system) where the customer identifies a new area to be audited. In such cases, the resulting new sub-location and its location will be automatically added to the site’s location details and an alert sent by the QA workflow completion process to the ‘QA administrator’ (as defined on the **System Control > Quality Audit tab**) to prompt for the new location details to be checked.

Any subsequent corrections to new (or existing) locations on the site will only affect the creation of QA forms going forward. Thus, if any existing **QA forms** need to be updated, the **Amend Room** button on the **QA form** on the main TemplaCMS system will facilitate this, e.g. to correct spelling mistakes and/or reassign the QA form. This is controlled by the “**QA form – Amend locations**” function.

REPORTING

Criteria Report

The **Criteria Report** button is available on the QA Forms list menu option:



This uses all completed QA forms on the current filtered list to create a KPI report:

The screenshot shows the 'QA Criteria Report' window with a table of KPI data. The table has columns for Site, Nov-12, Dec-12, Jan-13, Feb-13, Mar-13, Apr-13, May-13, and Jun-13. The data is as follows:

Site	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13
HIG004/1 - Heras	68.18(KPI2)						0.00(R10)	
MAY002/1 - Marli		60.56(KPI2)		72.73(KPI2)				
UOC001/2 - Pfize					76.00(KPI2)			
MAY002/2 - Marli								

Completed QA items

Completed **QA forms** results, especially for multi-location sites (see previous section) are potentially uploaded multiple times during a site visit, or only at the end of a site visit or day, depending on the WiFi availability at each site. However, the relevant contract / area managers do not want one emailed **QA failure report** every time an auditor synchronizes their mobile device but rather emailed **QA failure report** per day, split by site.

QA FAILURE RECIPIENTS & REPORT

On every contract via the QA tab there is access to a second lists of **QA recipients** – i.e. the site’s contacts, the site’s business analyses associated users and the contract’s employees – to control the distribution of failed **QA items** on completed **QA forms** to **QA failure recipients**.

An overnight batch job can produce a **QA Failures Report** that is automatically emailed to the nominated **QA failure recipients**, listing all failures for all completed **QA items** by client, site, building/area and room (i.e. location).

COMPLETED QA ITEMS

The **Completed QA Items** menu option provides access to a list of completed **QA items** which can be grouped and filtered, as required:

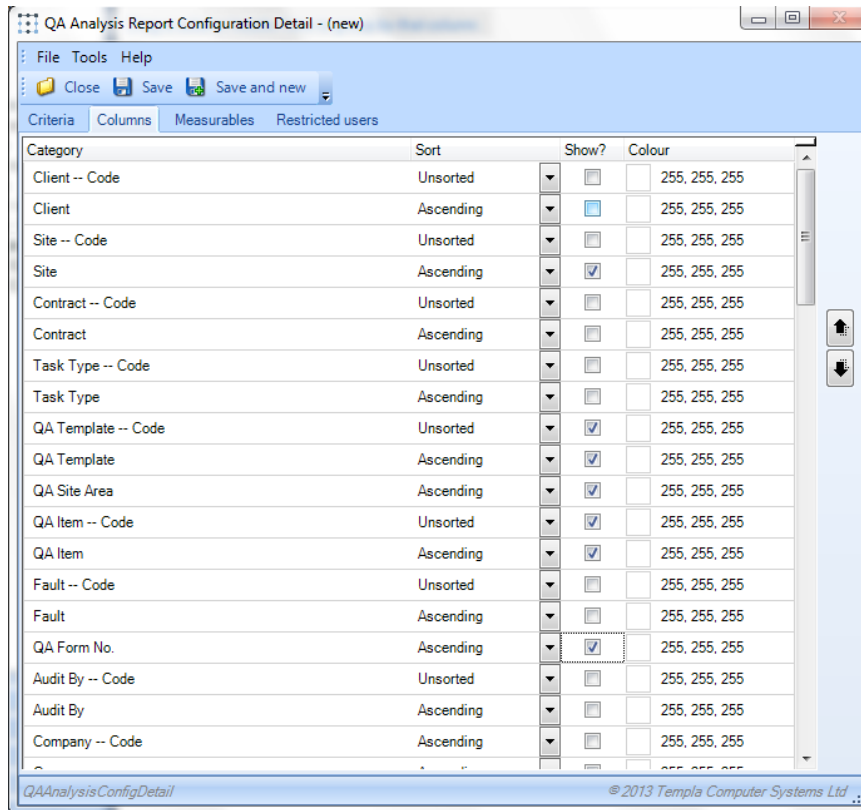
The screenshot shows the 'Completed QA Items' window with a table of completed QA items. The table has columns for Client, Site, Building, Room, St, Contract, QA template, QA number, Audit date, Area, QA item, Score, Fault code, Fault gr, Failed?, Region/Divison, and Service/O. The data is as follows:

Client	Site	Building	Room	St	Contract	QA template	QA number	Audit date	Area	QA item	Score	Fault code	Fault gr	Failed?	Region/Divison	Service/O
ABP001	New Client Ltd															
ABP001/1	ABP Ports															
		Building A														
			Room1													
				ABP001/1	Ocean Gat	LocationTesting - Locatio	1286	06/10/2014	Recept	RCS15	4 - Goo				Region A/Cleanin	SM 05
				ABP001/1	Ocean Gat	LocationTesting - Locatio	1286	06/10/2014	Recept	RCS15	4 - Goo				Region A/Cleanin	SM 05
				ABP001/1	Ocean Gat	LocationTesting - Locatio	1286	06/10/2014	Recept	RCS15	4 - Goo				Region A/Cleanin	SM 05
				ABP001/1	Ocean Gat	LocationTesting - Locatio	1286	06/10/2014	Recept	RCS15	4 - Goo				Region A/Cleanin	SM 05

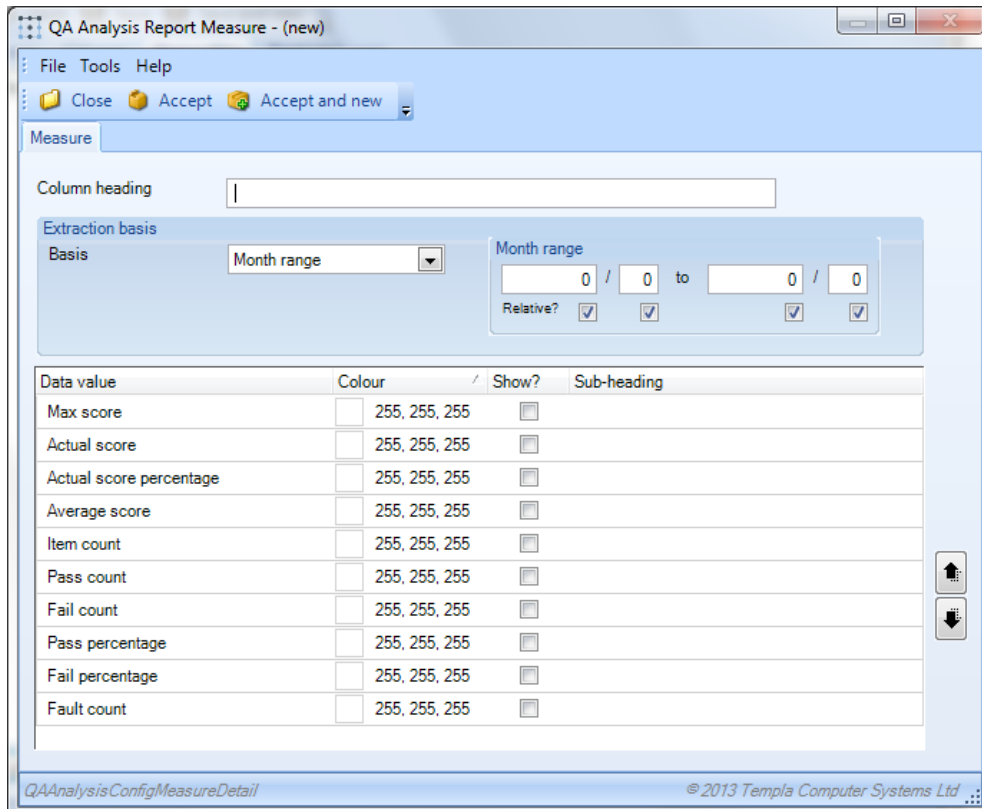
QA Analyzer

QA ANALYSIS – REPORT DEFINITION

When defining a QA Analysis report, the normal selection criteria are available but extra QA-related options have been added to the **Columns** tab, as shown below:



And on the **Measurables** tab when adding details, the measurables are pertinent to the QA process, as shown below:



QA ANALYSIS – REPORT

Once the report selections have been defined, it can be published, modified and run like any other **Analyzer report** within Templa-CMS:

QA Template	QAT	QA Si	QA It	QA It	QA F	Max score	Actual score	Score %	Average score	Items	Passes	Failures	Pass %	Failure %	Faults
NEWCASTLE OFFICE						40.00	10.00	25.00%	1.25	8.00	0.00	8.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Ground	C1	Cleanin	32	10.00	1.00	10.00%	0.50	2.00	0.00	2.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Manage	A2	General	32	5.00	1.00	20.00%	1.00	1.00	0.00	1.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Manage	A3	General	32	5.00	1.00	20.00%	1.00	1.00	0.00	1.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Manage	A1	General	32	5.00	1.00	20.00%	1.00	1.00	0.00	1.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Other	C4	Cleanin	32	5.00	2.00	40.00%	2.00	1.00	0.00	1.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Other	C2	Cleanin	32	5.00	2.00	40.00%	2.00	1.00	0.00	1.00	0.00%	100.00%	0.00
XYZCOMPANY	XYZ Co	Other	C3	Cleanin	32	5.00	2.00	40.00%	2.00	1.00	0.00	1.00	0.00%	100.00%	0.00
THE MAIN OFFICE						75.00	69.00	92.00%	4.60	15.00	14.00	1.00	93.33%	6.67%	2.00
						115.00	79.00	68.70%	3.43	23.00	14.00	9.00	60.87%	39.13%	2.00

QA compliance summary report

The **QA compliance summary report** provides a yearly snapshot of completed **QA items**. On progression from the **Selections** tab to the **Details** tab, the report extracts all completed **QA forms** matching the selections, providing a breakdown of percentage compliance and QA form count of all score card QA items not flagged as 'Exclude', by site and month along with full year totals.

Site	December 2013		January 2014		February 2014		March 2014		April 2014	
	% Compliance	Count	% Compliance	Count	% Compliance	Count	% Compliance	Count	% Compliance	Count
ABP001/3 - ABP Ports										
PNE006/1 - Penfold Consultants Ltd			60.00%	1					80.00%	2
WSB013/1 - Winstonlead Ltd					83.33%	1				
	0.00%	0	60.00%	1	83.33%	1	0.00%	0	80.00%	2

QA Audit Summary Report

Once a date range and client have been entered the **QA audit summary report** extracts all completed **QA forms** matching the selections, providing a breakdown of actual and possible score for each score card **QA item** not flagged as 'Exclude', split out by QA item along with total scores and percentage compliance. On extraction, a tab is provided for each site/building with two rows, for 'Actual score' and 'Maximum score'.

For ease of reporting, **QA items** allow the definition of a 'report description' to be displayed on the report for each **QA item** column. Where a report definition is not provided a shortened **QA item** is displayed on the report.

ABP Ports	No. surveys	Cleaning operatives a...	Provision of cover cl...	Window cleaners atten...	Responsiveness of loc...	Responsiveness of cen...	Evidence of weekly ex...	Sweeping, mopping dam...	Mopping and vacuuming...	Mopping and hygienic...	Evidence of mopping a...	Floors	Furniture	Glass	Fam-bins	Fittings	Total score	Compliance %
Actual Score	8	8	8	8	8	8	8	24	8	8	10	130	130	156	26	26	566	85.76%
Maximum Score		10	10	10	10	10	10	30	10	10	10	150	150	180	30	30	660	

QA COMPLETION ON CMS MOBILE

QA's can be completed on a mobile device, e.g. iPad or Android tablet. The configuration of TemplaCMS for this purpose is covered in another document: **TemplaCMS Mobile Gateway**.

Setup/Configuration

- One mobile device must relate to one TemplaCMS user
- Mobile devices can receive contract and/or **QA details** (and/or Workbills in future)
- Configuration of the mobile device is via 'cog' icon top-left on the initial screen

Synchronization

- Mobile devices should be synchronised periodically, e.g. daily via WiFi connection – this is achieved via the **Refresh** icon top-right on the initial screen:
 - Contract & QA details will be passed up to the mobile device
 - Completed QA details will be passed down from the mobile device
 - Redundant contracts & completed QA details are currently not removed
- If CMS mobile crashes, close it down – do this by pressing the **Home** button (a the bottom/side of your iPad) twice in a row, to make a task bar appear, showing your most recently used apps; hold your finger against one of the app icons until the icons start to 'shimmer' then tap the red button with the minus sign to close the app

- The **Last sync date** option on the device registration list will display the date and time of when the device was last synced, i.e the user pressed the sync button on their device.

Contracts

- If a TemplaCMS user is allowed to see a contract, then all contract details are sent to the device, i.e. including budget and billing details; the same level of function security that exists in TemplaCMS is not available on the mobile device
- Only live contracts are sent to the mobile device
- Uploaded contract list can be searched, if required
- Contract & site details can be hidden, if required
- Details are at contract/site level, grouped by client
- Within contracts: tasks, budgets, employee pay, billing & equipment details exist
- Within contract tasks: budget, employee pay & billing details for the task exist

Quality Audits

- Separate **Pending** and **All** tabs exist
- Uploaded **QA forms** list can be searched, if required
- Details are grouped by client
- **QA forms** are “read-only” if:
 - already completed
 - not assigned to the current mobile device user, i.e. a user will see all **QA forms** for all contracts that they normally have access too but only the assigned user can complete the **QA form**
- **QA forms** have tabs for:
 - *General* – general information
 - *Results* – this is where the **QA form** must be completed:
 - Optionally enter **comments** on the **QA area**
 - Enter the score from the dropdown at **QA item** (or **QA area**) level
 - Add **comments** on any **QA item** failures, plus optionally a **QA fault code** and/or a **picture**
 - *Completion* – once the **QA form** results have been entered, the QA form must be completed, i.e. enter a signature and/or name (both are optional) then ‘tick’ the complete box and then **Accept**
 - *Criteria* – once a completed **QA form** has been uploaded, the **QA form’s QA criteria** will be updated with the compliance rating

APPENDIX A – QA TEMPLATE SETUP

The following provides guidelines for the steps needed to create a new QA Template:

Step 1: Setup new QA Score Card

NB: unlikely to be needed if everything shares the same default QA score card

- **Add** a new (or **Copy** an existing) **QA score card**
- Enter/set relevant fields, i.e.: text, value, colours and failed status

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

Step 3: Setup any new QA Faults or QA Fault Groups

Step 4: Setup new QA Item Group

NB: only needed if the QA items are specific to this QA template

Step 5: Setup all the new QA Items, i.e. Questions

- Setup all **QA items**, assigning each to the new **QA item group** and flagging with the relevant **data type**, i.e. score card if they are going to be scored
- **Add** all other **QA items**, although once the first is created it's easier to copy

Step 6: Setup the Site Structure

NB: if varying an existing QA template then existing Site Structure can probably be used

- **Add** a new **Site Structure**
- **Add** all the **QA areas** (and **QA sub-areas**) required

Step 7: Setup the QA Template

- **Add** a new **QA Template** selecting 'print style' Format1
- Assign **QA Criteria** and **QA items** to each area/heading, as necessary
- Consider if **QA areas** need area-level scoring

Step 8: Assign QA template to Contract

- Find the contract, create a new version and add the **QA template** via the QA tab:
- Ensure the 'Next QA date' is set 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.

Step 9: Create One-Off (optional)

- To check the **QA template** meets the layout requirements, a one-off QA can now be created from the **QA forms list** for the contract that has been assigned the new **QA template**.

GLOSSARY

QA area – an area to be Quality Assured within a **QA form**

QA batch – monthly batch of **QA forms** generated from the contracts **QA templates**

QA criteria – defines the criteria by which the company's QA process is to be measured

QA fault code – allows analysis of faults; failed **QA items** only optionally require a **QA fault code** to be entered; a **QA fault code** can also be added to a non-failure **QA item**

QA fault groups – allows **QA fault codes** to be logically grouped

QA form – the resulting document for completion by the Area Manager or Quality Assessor

QA form recipients – target site-level contact(s) to receive auto-emailed completed **QA form**

QA item – lowest level of measurable to be quality assessed, e.g. uniform, toilet, stairs, etc.

QA item group – **QA items** are assigned to **QA item groups**, purely for ease of setup

QA score cards – determines how a **QA form** is to be scored, e.g. 1-5 or 1-10, etc; can be set at System Control, **QA template**, Contract, **QA area** or **QA item** – either the System Control, **QA template** or Contract's **QA score card** prints on the **QA form**.

QA template – the configuration of the **QA form** characteristics, i.e. there will be one **QA template** per **QA form** style in the field; **QA templates** are assigned to contracts

QA template type – allows QA templates to have different workflow assignment rules

Site structure – the type of site to be quality assessed, ideally as generic as possible, e.g. office block; typically (for simplicity) there will be one site structure per **QA form** style, i.e. a one-to-one relationship between **QA template** and **Site structure**.

Site locations – allows buildings & rooms to be defined within a TemplaCMS site



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