



eForms & Workflow Module

This module provides organizations with the ability to design and automate paper forms. Automatic Programs monitor activities such as: reviewing, editing and signing. Content can be extracted for trending and other analysis. Below is a list of popular features.

MAJOR FEATURES	SUMMARY OF FUNCTIONALITY
Multiple Form Types	Many different types of database forms can be designed and controlled by the Forms Module. For example: Competency Assessments, Customer Complaints, Non-Conformances, CAPA, Training Registrations, Meeting Minutes, and other forms.
Use of Microsoft Word for Report Templates	Forms can merge into MSWord document templates allowing the use of existing formats for viewing and printing.
Easy to Design	Form design functions are easily learned and quickly implemented.
Workflow Definition	Workflows can be assigned to forms for automatic notification of work assignments.
Integration	Ability to automatically link other tables within TMSWeb and easily integrate with tables in other applications.
E-mail Notifications	E-mail notification of action items provides direct links to the form requiring action.
Multiple Fields	Ability to repopulate fields an unlimited number of times when entering a form.
Free Format Text Capabilities	This capability exists throughout the system for text color, font styles & sizes.
Access via TMS Permissions Table & Individual Forms	Access rights of users can be based on standard location & permission table; or specific forms. For example, only specific individuals have permission to access a particular form.
Field Types	Numerous field types are available for designing forms, such as: date, checkbox, unlimited editor, 255 characters, attachments, signatures, number, number with range, drop down list (multiple & single), field mapping (value of one field based on the selection of another), object lists and more.
Form Packet	Ability to tie numerous forms together and group them as a Form Packet.
Form Copy	Ability to copy one form to another for common use information.
Form Attachments	Ability to attach external documents for verification. Documents are uploaded onto a protected web server.
Searching	Ability to assign numerous field types as searchable when defining form fields.
Activity Categories	Activities can be grouped in categories and assigned to forms. For example: from this form, only these activities are activated.
Electronic Signatures	System complies to the FDA 21 CFR Part 11 (Electronic Signatures and Electronic Records) ruling.
Form Information Carry-Over	Information from one form within the packet can be carried over to another form.
Defining On-Line Help	This option can define On-Line Help for each field.
Audit Trail Option	Audit trails for forms will display field name, updated date and user, and values of current and prior changes to the fields.
Workflow Status Page	Forms display current activities and if attached to workflow, the status of steps as: Completed, In Progress, Rejected, and Not Started. The step name, activity type, form name and recipients are also displayed.
Form Security	Forms can be locked and closed on electronic signatures.