



# Forms & 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
<b>Multiple Form Types</b>	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.
<b>Use of Microsoft Word for Report Templates</b>	Forms can merge into MSWord document templates allowing the use of existing formats for viewing and printing.
<b>Easy to Design</b>	Form design functions are easily learned and quickly implemented.
<b>Workflow Definition</b>	Workflows can be assigned to forms for automatic notification of work assignments.
<b>Integration</b>	Ability to automatically link other tables within TMSWeb and easily integrate with tables in other applications.
<b>E-mail Notifications</b>	E-mail notification of action items provides direct links to the form requiring action.
<b>Multiple Fields</b>	Ability to repopulate fields an unlimited number of times when entering a form.
<b>Free Format Text Capabilities</b>	This capability exists throughout the system for text color, font styles & sizes.
<b>Access via TMS Permissions Table &amp; Individual Forms</b>	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.
<b>Field Types</b>	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.
<b>Form Packet</b>	Ability to tie numerous forms together and group them as a Form Packet.
<b>Form Copy</b>	Ability to copy one form to another for common use information.
<b>Form Attachments</b>	Ability to attach external documents for verification. Documents are uploaded onto a protected web server.
<b>Searching</b>	Ability to assign numerous field types as searchable when defining form fields.
<b>Activity Categories</b>	Activities can be grouped in categories and assigned to forms. For example: from this form, only these activities are activated.
<b>Electronic Signatures</b>	System complies to the FDA 21 CFR Part 11 (Electronic Signatures and Electronic Records) ruling.
<b>Form Information Carry-Over</b>	Information from one form within the packet can be carried over to another form.
<b>Defining On-Line Help</b>	This option can define On-Line Help for each field.
<b>Audit Trail Option</b>	Audit trails for forms will display field name, updated date and user, and values of current and prior changes to the fields.
<b>Workflow Status Page</b>	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.
<b>Form Security</b>	Forms can be locked and closed on electronic signatures.