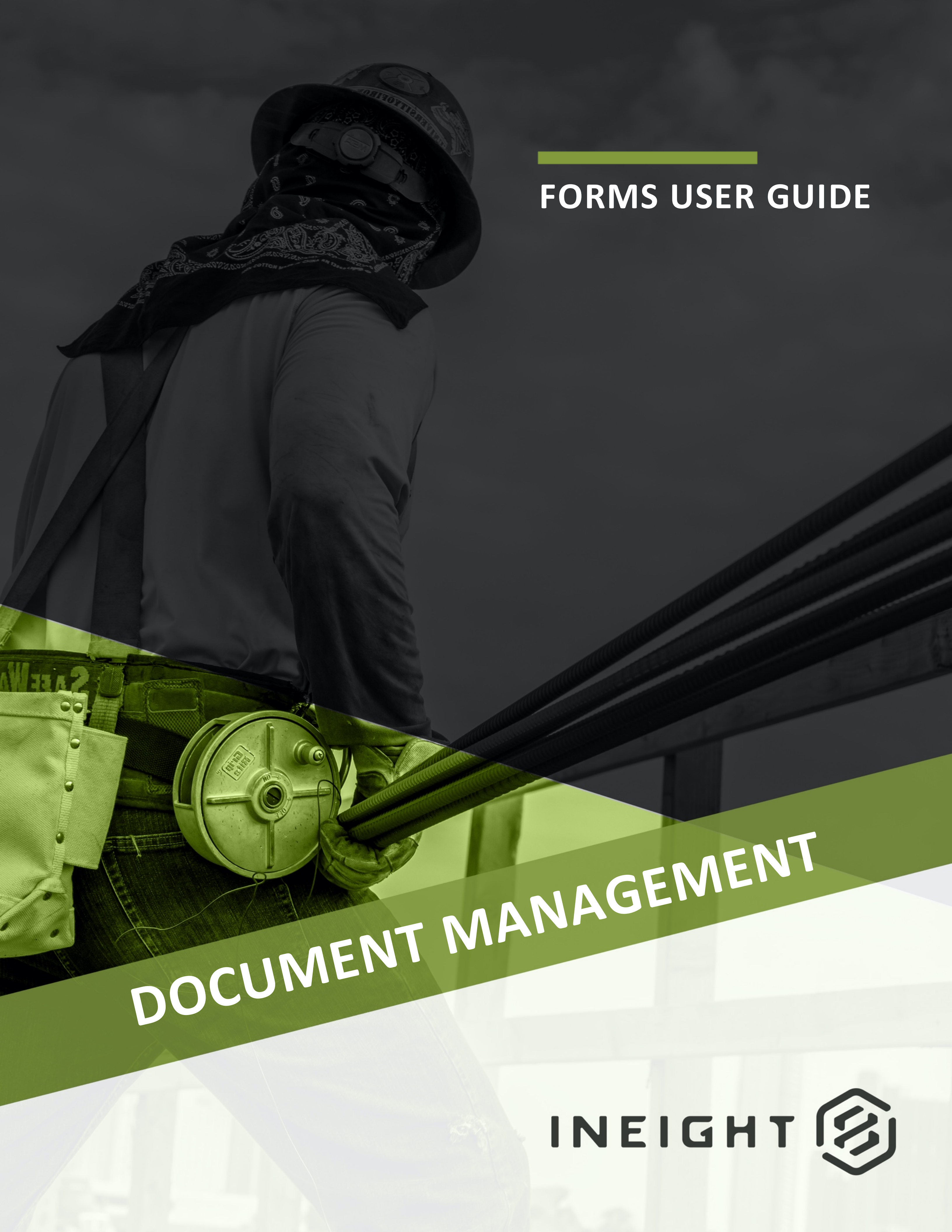

FORMS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

Release 19.7
Revision: 5
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CONTENTS

CHAPTER 1 – INTRODUCTION TO FORMS

InEight Forms are documents that are completed on a step by step basis with inputs and sections often completed by different parties within InEight Document. A simple example of an InEight Form is a Request for Information (RFI) where an initiating party uses an RFI Form to raise a question from party to another on a project. This question is then responded to on the same Form by one or more other parties.

A more complex Form might be a Non-Conformance Report (NCR) Form where there may be multiple steps required to be managed and recorded on the same Form from the initial raising of the issue to the final close out.

An InEight Document Form has a single reference number, a single status indicator and is managed via a separate Forms module. The Forms module also enables defining of a complex workflow driven process for the completion of a Form type, which ensures that events in relation to the Form happen in the required order.

Forms are mobile friendly and allow for offline and online completion.

1.1 FORMS IN INEIGHT DOCUMENT

There is no concept of "outgoing" and "incoming" with Forms. Rather, a Form uses a concept of a Form being structured in Sections and with Steps to be taken to move between the Sections. The steps can be managed via a Form Workflow. A Form typically works as follows:

1. An Initiator creates a new Form e.g. Request for Information (RFI) or Non- Conformance Report (NCR).
2. A reference number is assigned to the Form.
3. The Initiator completes the initiator section of the Form. This includes the following:
    a. Details about the issue/question being raised.
    b. Reference documents.
    c. The "Requested by" person.
    d. The distribution list (Form recipients) clearly indicating who is intended to action each subsequent section of the Form (listed in the "For Action" field) and who is just receiving the Form for information (**For Info** field).

4. Prior to being published, the Form is visible only to the Initiator and can be saved multiple times and remain as a draft.
5. Once finished, the Initiator publishes the Form using the **Complete Action** button.
6. Based on the type of Form the following then occurs:
   a. For Non-Workflow Forms (e.g. Hold Points): All Form participants are notified and all remaining sections of the Form enabled and completed as required. Any user in the For Action field can update and edit any Form sections except for the initiator section. Section level control can be maintained by clicking the **For Action** button and updating permissions for each user to each section on the Form.
   b. For Workflow Forms (e.g. RFI): the status is changed and recipient(s) responsible for the next step in the workflow are notified. The final recipient for each step chooses what the “Next Action” will be (for example to return the Form to the Initiator or send it on to additional recipients for further action). Each step has a default status, but an alternative status can also be selected when selecting **Next Action.**
7. While the status of a Form remains as Outstanding, the Form can continue to be edited. When the Form status is changed to **Closed Out** it becomes locked and can no longer be edited. If required, an Administrator can reactivate the Form using the **More** button from within the Forms register.

Form participant access can be set at a Form or Section level or defined by a workflow. Default distribution groups and workflows can also be defined in advance or as required.

1.2 TERMINOLOGY

There are a number of terms used within InEight Document in relation to Forms.

Form Sections:	Separate areas of the Form to which access can be controlled.
Form Steps:	Logical steps connected via a workflow
Next Action:	Possible outcomes the user can select from after completing their step (configured via the workflow). This outcome can also affect the Form Status.
Form Status Values:	Values that are assigned to one or more steps to further assist in the management of forms.
Distribution:	The distribution list for a Form is separated into people receiving the Form “For

Form Sections:	Separate areas of the Form to which access can be controlled.
	Action" and those receiving the Form "For Information". "For Action" recipients can add information to the Form (although for Workflow based Form, access is further restricted by workflow Steps).
Complete Action:	This is the process of publishing the Form or to indicate you have completed your section resulting in the Form being moved onto the next Step.
Workflow Driven Forms:	A workflow driven Form is broken into a number of steps with each step related to one or more sections to be completed by one or more assigned recipients.
Non-Workflow Driven Forms:	A non-workflow Form is comprised of two elements: The Initiator Section and one or more other recipients sections.

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CHAPTER 2 – FORM COMPONENTS

2.1 DISTRIBUTION LISTS

Form participants are split into “For Action” and “For Info” groups.

2.1.1 For Action Participants

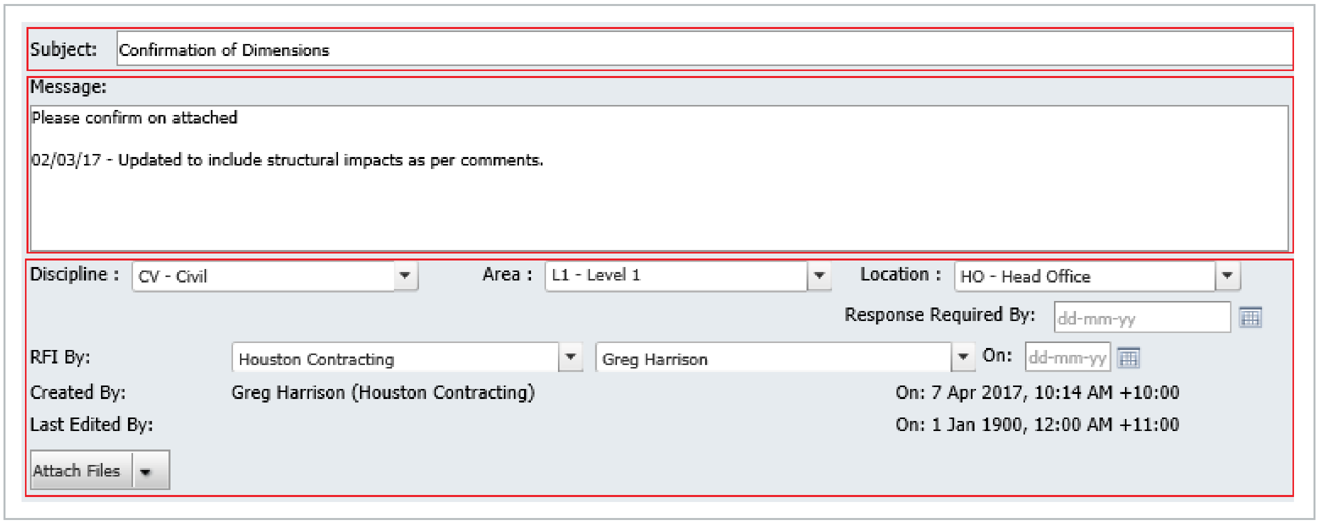
The “For Action” field recipients can be required to update one or more sections of the Form other than the Initiator’s Section. The initiator may also be added as one of the For Action recipients.

2.1.2 For Info Participants

The “For Info” recipients are not able to edit field values in the Form sections but can add comments and view the history details of the Form.

2.2 INITIATOR SECTION

The Initiator's Section of a Form contains a Distribution List, Subject, Message and standard fields such as Discipline, Area and Location, similar to those standard fields used in the mail module. On some Form types other fields such as a grid or date and time fields maybe available. The recipients will also be able to view who created the Form, who last edited it and the corresponding dates.



NOTE The administrator or the creator of the Form is the only person able to edit this section.

2.3 FORM TAB OPTIONS

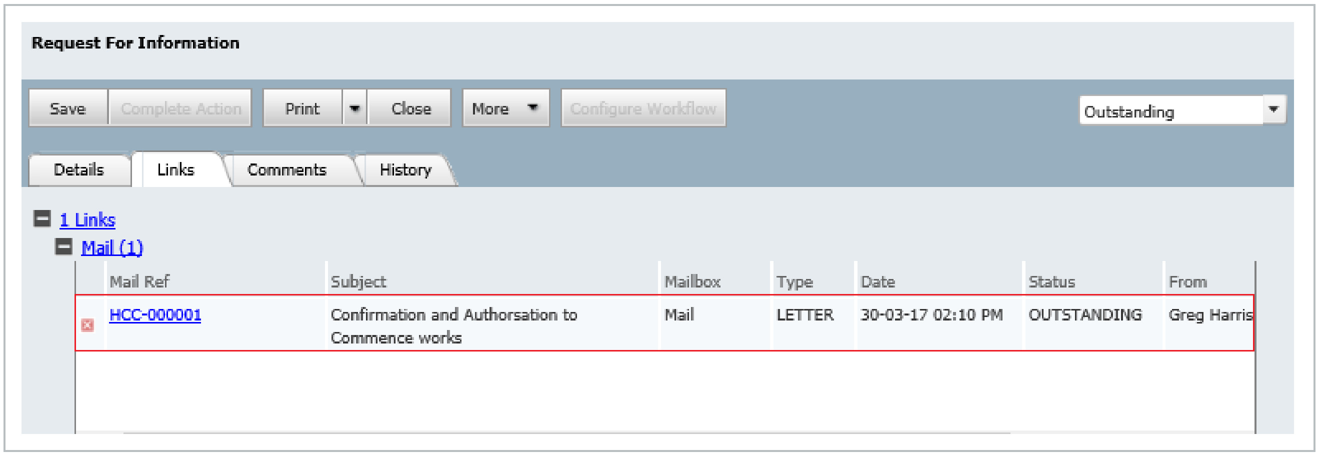
In addition to Form details it is possible to use the tabs at the top of the Form screen to:

- Establish Links between the Form and other InEight Document objects.
- Allow Comments and discussion around the Form.
- View the Review Status (i.e. who is currently responsible for updating the Form).
- View the complete History of all actions and events in relation to the Form.

2.3.1 Links Tab

Form Links allow a user to link other InEight Document objects such as Mail, Documents, Transmittals, other Forms, and Packages to the Form. These links are also shown in the corresponding module (i.e. it is possible to see the Form in the mail thread should a Form have been linked to that piece of mail).

Links follow existing access rules. For example, if you do not have access to view a piece of mail in the Mail register (because you aren't the sender or a recipient and you don't have company access to that mail) then you do not see the link to this mail in the Form.



Links are displayed at the bottom of the form when exported to HTML or printed.

Links

Document Links:

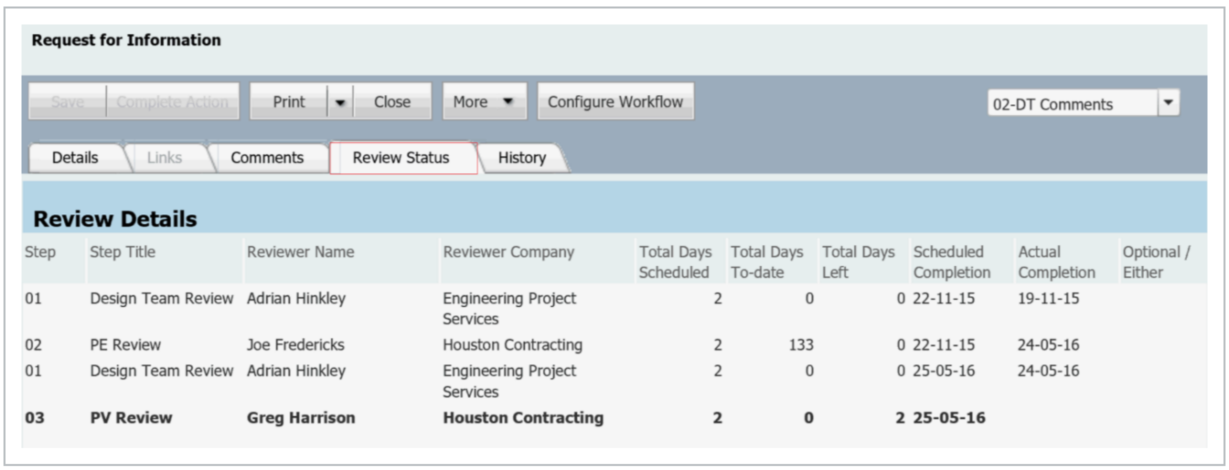
Document No.	Title	Rev.	Sts	Disc.	From	From Company
E-G-L-0001A	High Voltage Electrical Outline Level 1A	C	IFI	ELEC	Greg Harrison	Houston Contracting
E-G-L-0002A	High Voltage Electrical Outline Level 2A	C	AB	ELEC	Greg Harrison	Houston Contracting
E-G-L-0002B	High Voltage Electrical Outline Level 2B	C	AB	ELEC	Greg Harrison	Houston Contracting

2.3.2 Comments Tab

The Comments tab captures informal discussions among Form participants. Comments can be made by all users with access to the Form (for action OR for information). When creating a comment, users can select which of the form participants are to be notified.

2.3.3 Review Status Tab

The Review Status window displays a history of reviewer actions (including the step during which the action was taken), number of days taken to review the Form, completion dates and the current recipient(s) reviewing the Form.



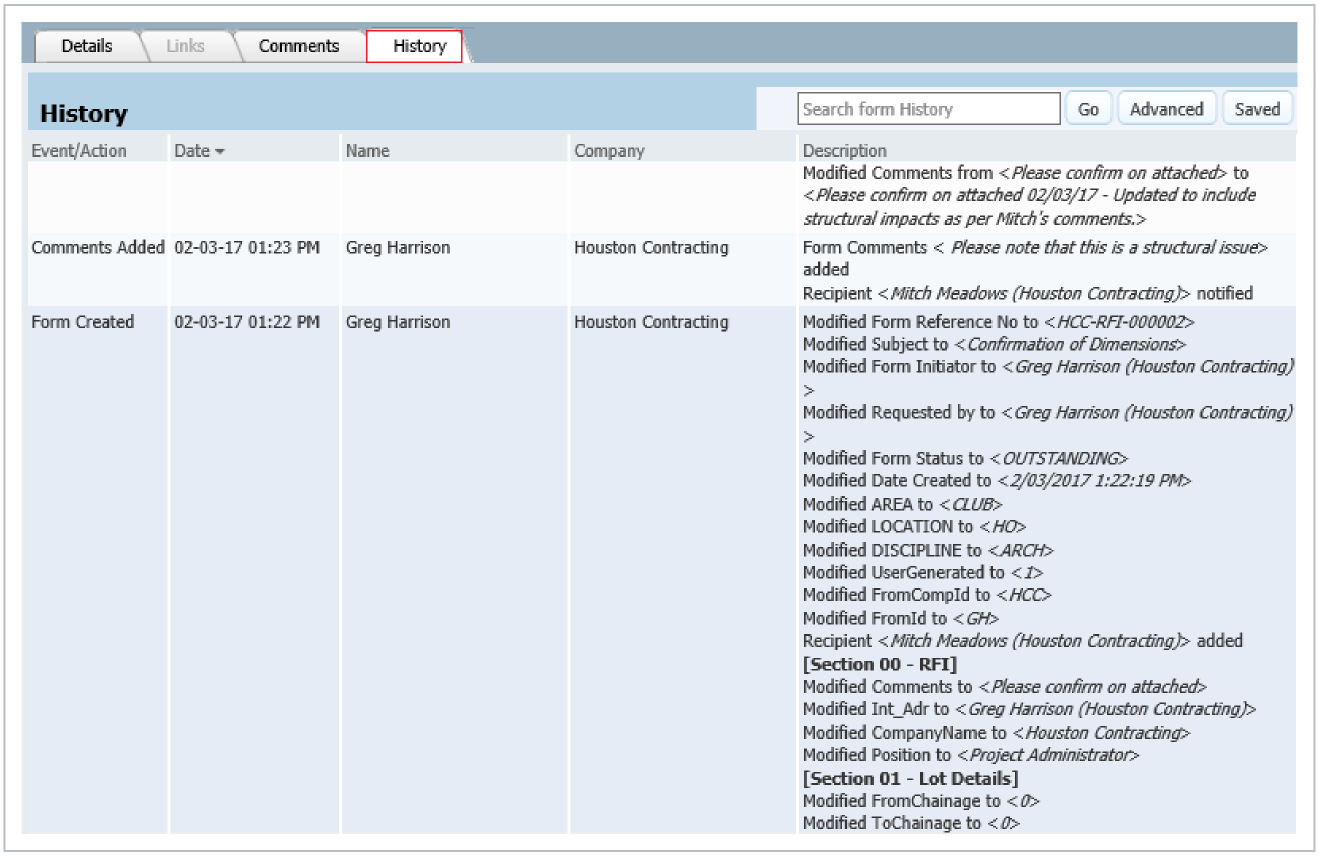
2.3.4 History Tab

The History tab displays a complete history of events and actions regarding the Form.

Every action (the download of attachments, editing of text, changing of Form Distribution and change of Status), will be recorded in the history. Form content edits will show both the before and after state.

The Form History can be filtered by date range of edits, company, Contact making changes or event type.

If a section is not visible on the Form for a given user, then the History for that section is hidden for that user.


Details
Links
Comments
History
History
Search form History
Go
Advanced
Saved
Event/Action
Date
Name
Company
Description
Modified Comments from <Please confirm on attached> to <Please confirm on attached 02/03/17 - Updated to include structural impacts as per Mitch's comments.>
Comments Added
02-03-17 01:23 PM
Greg Harrison
Houston Contracting
Form Comments < Please note that this is a structural issue> added
Recipient <Mitch Meadows (Houston Contracting)> notified
Form Created
02-03-17 01:22 PM
Greg Harrison
Houston Contracting
Modified Form Reference No to <HCC-RFI-000002>
Modified Subject to <Confirmation of Dimensions>
Modified Form Initiator to <Greg Harrison (Houston Contracting)>
Modified Requested by to <Greg Harrison (Houston Contracting)>
Modified Form Status to <OUTSTANDING>
Modified Date Created to <2/03/2017 1:22:19 PM>
Modified AREA to <CLUB>
Modified LOCATION to <HO>
Modified DISCIPLINE to <ARCH>
Modified UserGenerated to <1>
Modified FromCompId to <HCC>
Modified FromId to <GH>
Recipient <Mitch Meadows (Houston Contracting)> added
[Section 00 - RFI]
Modified Comments to <Please confirm on attached>
Modified Int_Adr to <Greg Harrison (Houston Contracting)>
Modified CompanyName to <Houston Contracting>
Modified Position to <Project Administrator>
[Section 01 - Lot Details]
Modified FromChainage to <0>
Modified ToChainage to <0>

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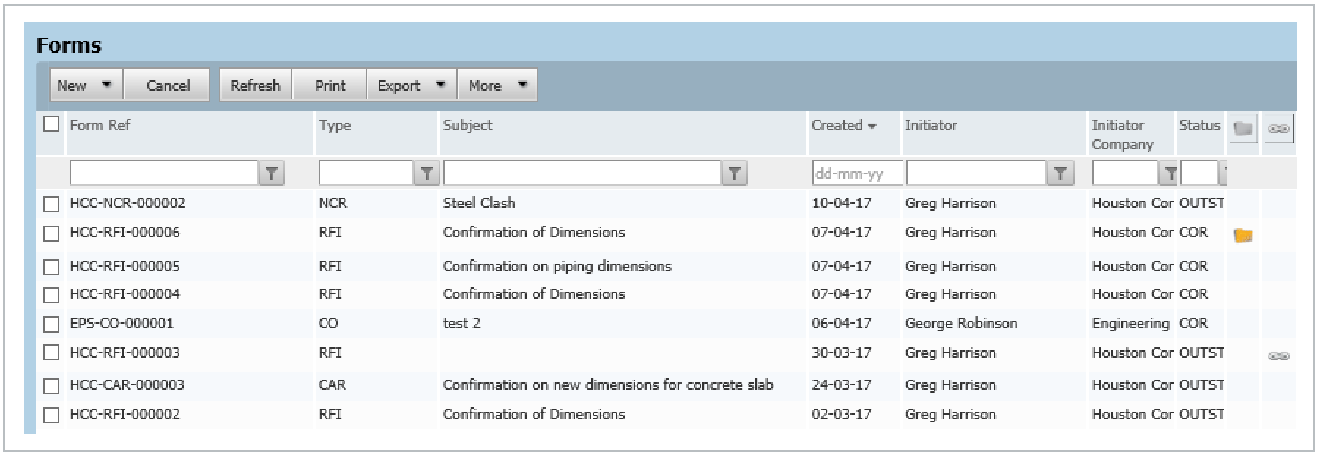
CHAPTER 3 – FORM REGISTER

The Forms Register is accessed using the Forms module button on the left hand side of InEight Document. The register includes Form Type, Initiator, Status and Company Information. Available Links are denoted by the chain (link) icon and forms that have been allocated to a folder have the folder icon displayed.



Form Ref	Type	Subject	Created	Initiator	Initiator Company	Status
HCC-NCR-000002	NCR	Steel Clash	10-04-17	Greg Harrison	Houston Cor	OUTST
HCC-RFI-000006	RFI	Confirmation of Dimensions	07-04-17	Greg Harrison	Houston Cor	COR
HCC-RFI-000005	RFI	Confirmation on piping dimensions	07-04-17	Greg Harrison	Houston Cor	COR
HCC-RFI-000004	RFI	Confirmation of Dimensions	07-04-17	Greg Harrison	Houston Cor	COR
EPS-CO-000001	CO	test 2	06-04-17	George Robinson	Engineering	COR
HCC-RFI-000003	RFI		30-03-17	Greg Harrison	Houston Cor	OUTST
HCC-CAR-000003	CAR	Confirmation on new dimensions for concrete slab	24-03-17	Greg Harrison	Houston Cor	OUTST
HCC-RFI-000002	RFI	Confirmation of Dimensions	02-03-17	Greg Harrison	Houston Cor	OUTST

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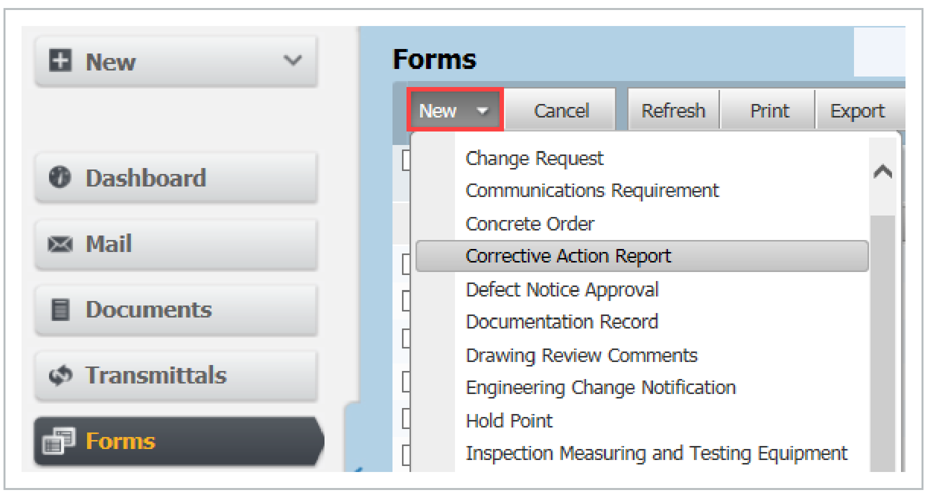
CHAPTER 4 – PARTICIPATING IN A FORM

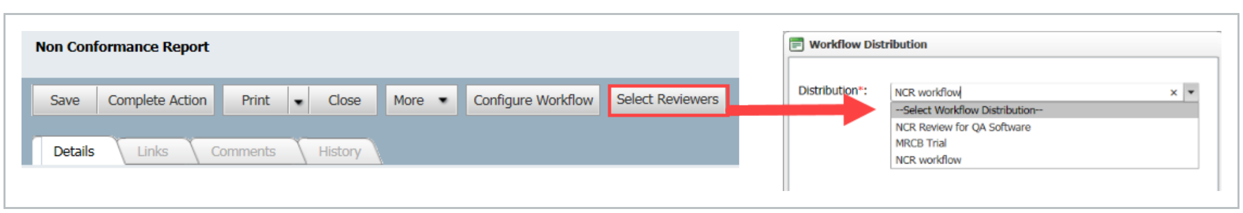
This section covers the standard user process for initiating and reviewing Forms using default workflows and distribution groups.

4.1 HOW TO INITIATE A NEW FORM

1. Click on the Forms Module to open the Forms Register.
2. Click New and select the type of Form to initiate.

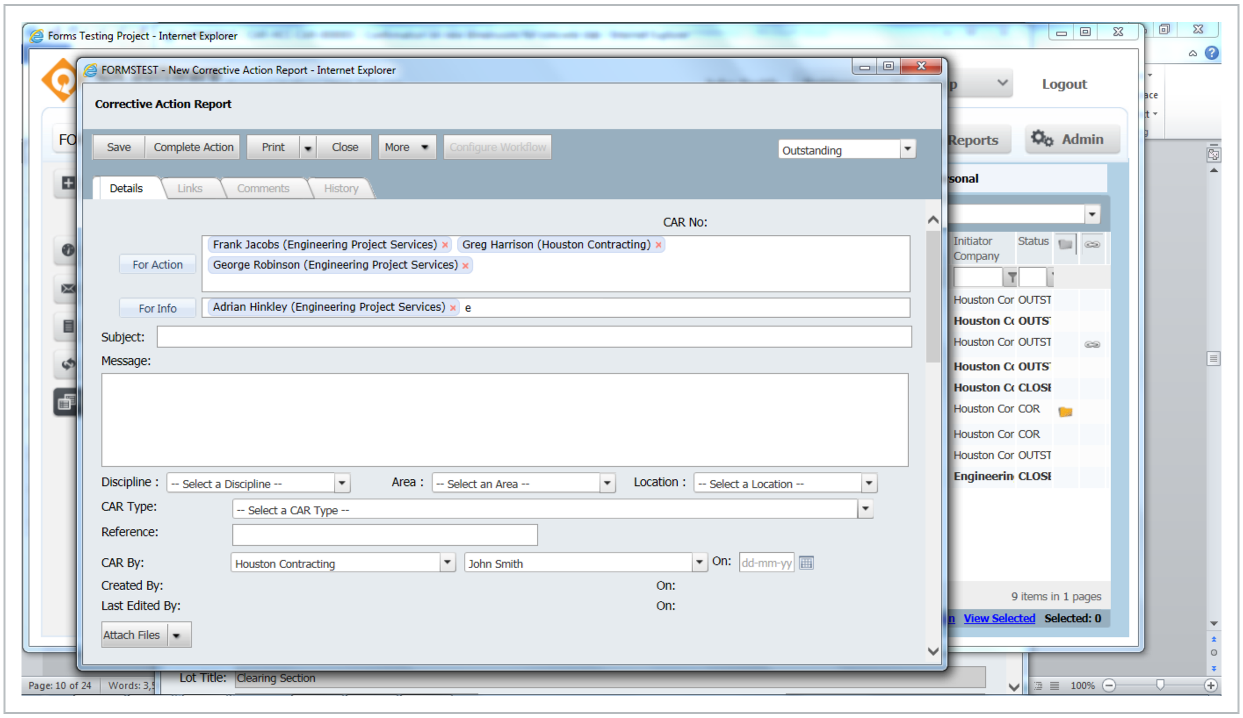


3. For a Workflow Form, click **Select Reviewers** and choose the appropriate Distribution group then **OK**. This will automatically populate the For Action and For Info fields.

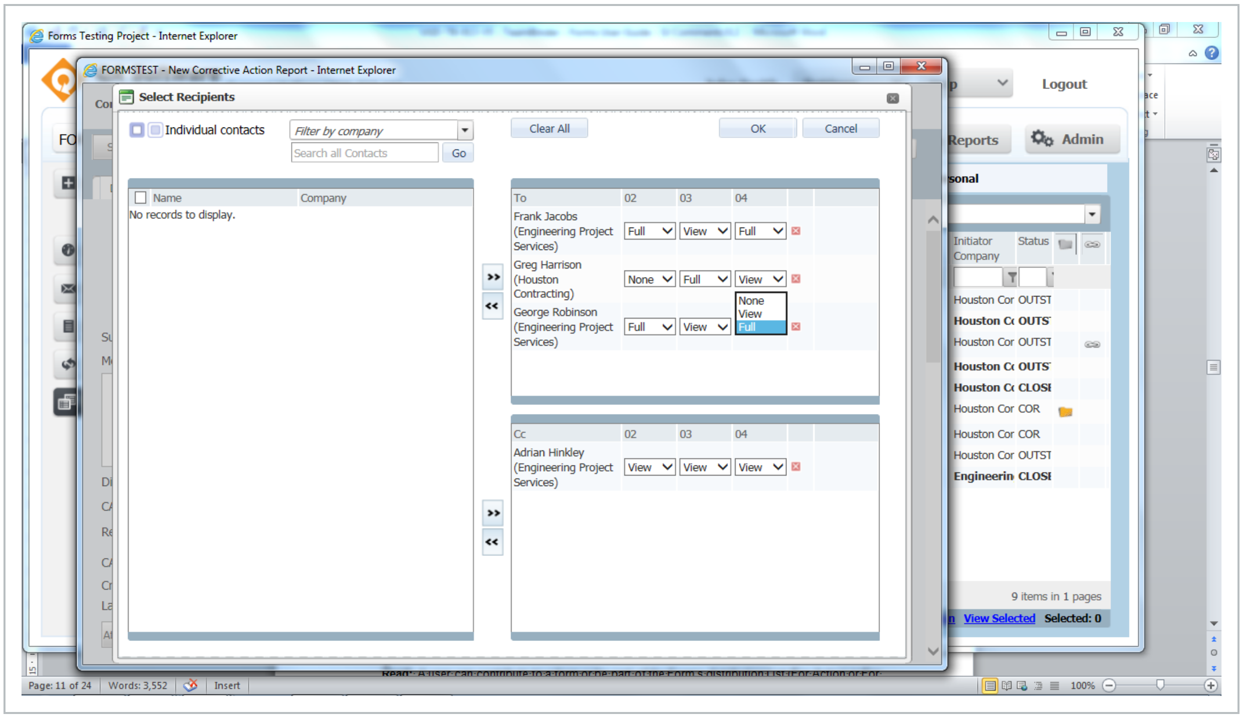


4. For Non-Workflow Forms, manually add recipients to the **For Action** field (who are required to

update one or more sections) and recipients to the **For Info** fields (who need to view the Form but can only add comments in the Comments tab and view the history details).



5. Next, if required, define which users need access to each Form section by clicking the **For Action** button and assigning None, View or Full access per user per section then click **OK**.



6. Complete all other required details in the Initiator section (fields will depend on the type of Form and project) and attach documents or InEight Document Mail using the arrow next to the **Attach** button, if required.
7. Click **Save** to save progress but keep the Form as a draft.
8. Once complete, click **Complete Action** to publish the Form. Form Recipients will then receive a notification that a Form has been issued to them.

InEight DOCUMENT POWERED BY TeamBinder

Notification of Form Issued

You have received the following Form in TeamBinder.

Project: Forms Testing Project (FORMSTEST)
Date: 11 April 2017, 01:53:08 PM +10:00

Form Reference No	Subject	Form Initiator			
HCC-NCR-000004	Test	Greg Harrison (Houston Contracting)			
	Status	Type	Title	Created Date	Issue Date
	OUTSTANDING	NCR	Non Conformance Report	11 April 2017	11 April 2017

Distribution:

For Action

Name	Company
Adrian Hinkley	Engineering Project Services
Frank Jacobs	Engineering Project Services
George Robinson	Engineering Project Services

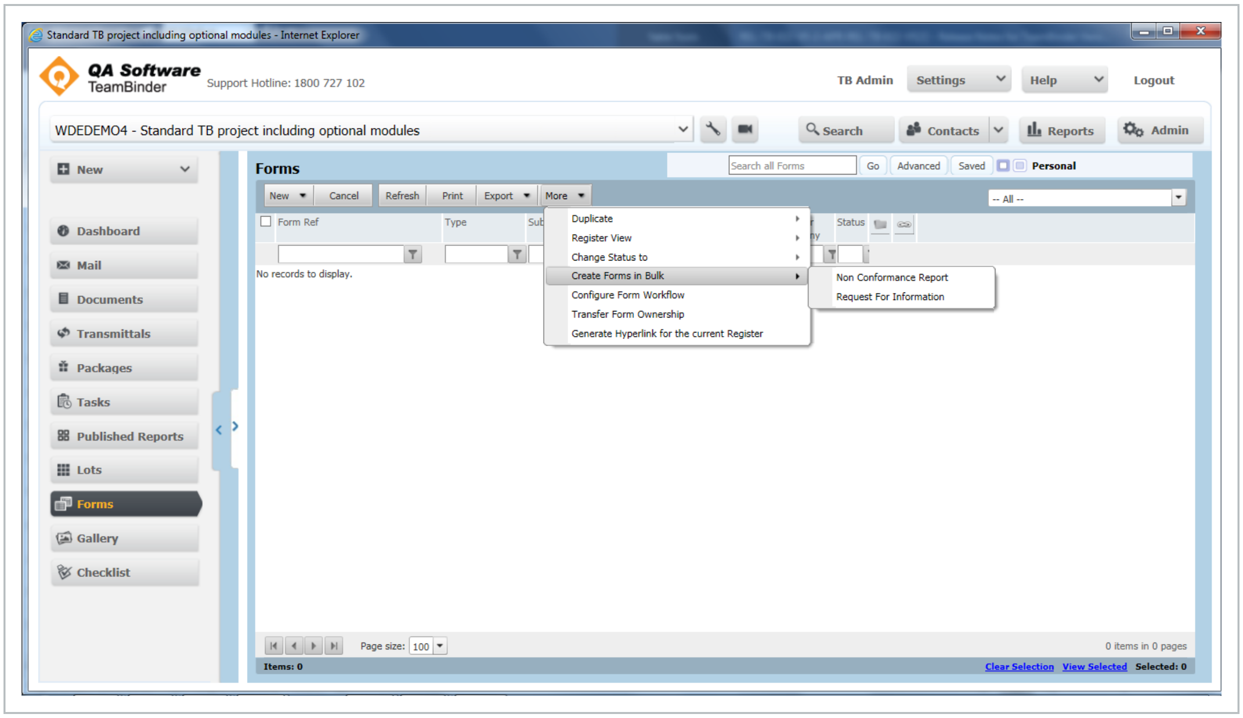
New distribution groups can be created from within the Configure Form Workflow table as outlined in section 7.13 below.

4.1.1 Creating Forms in Bulk

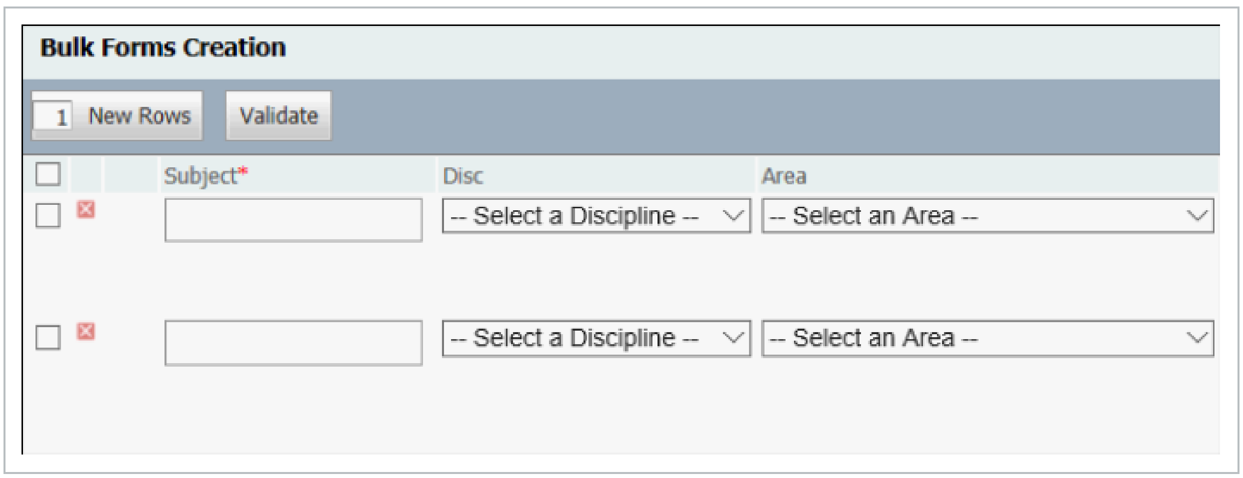
Forms can be created in bulk to serve as place holders for future use, prior to the actual forms being created.

To create forms in bulk:

1. From within the Forms register click on the **More** button and select **Create Forms in Bulk** and select the Form Type.



2. You will then be prompted to enter standard information that is captured when creating a single form of this type excluding any custom fields.

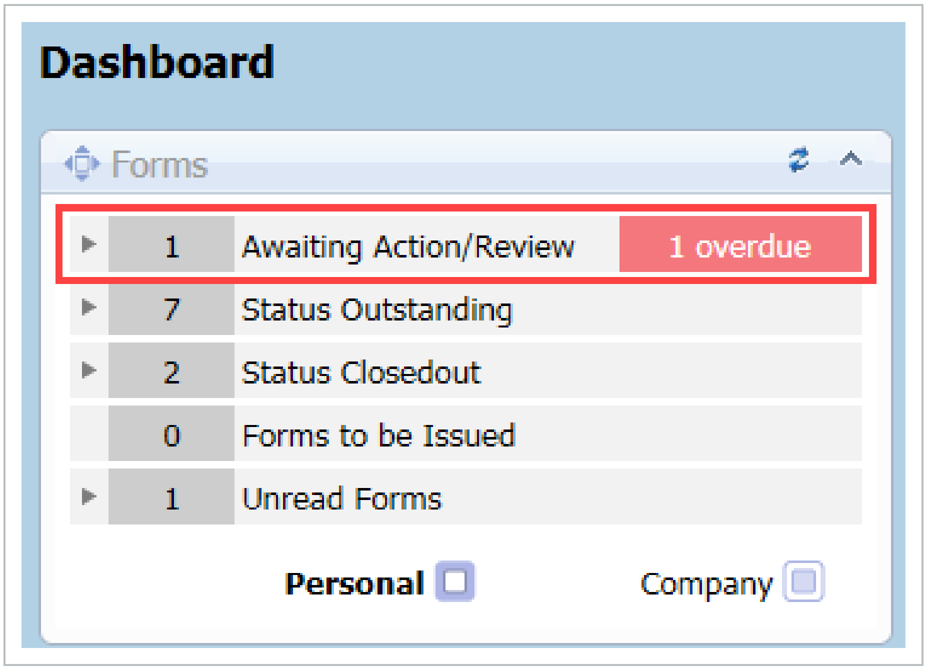


NOTE

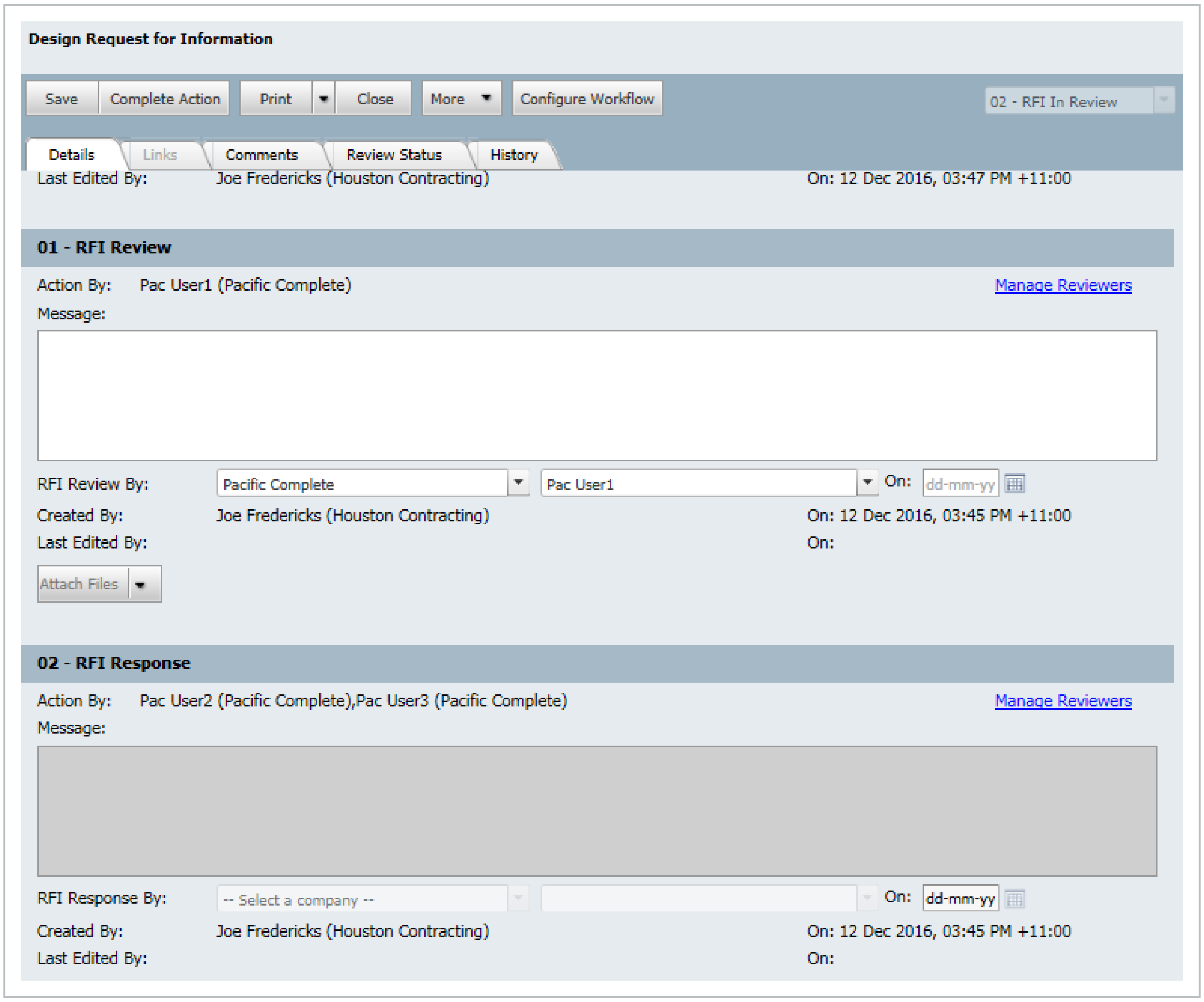
- Use the **New Rows** button to enter the number of forms to create.
- Use the **Validate** button to check the entered data before clicking the **Save** button.

4.2 HOW TO REVIEW AND UPDATE A FORM

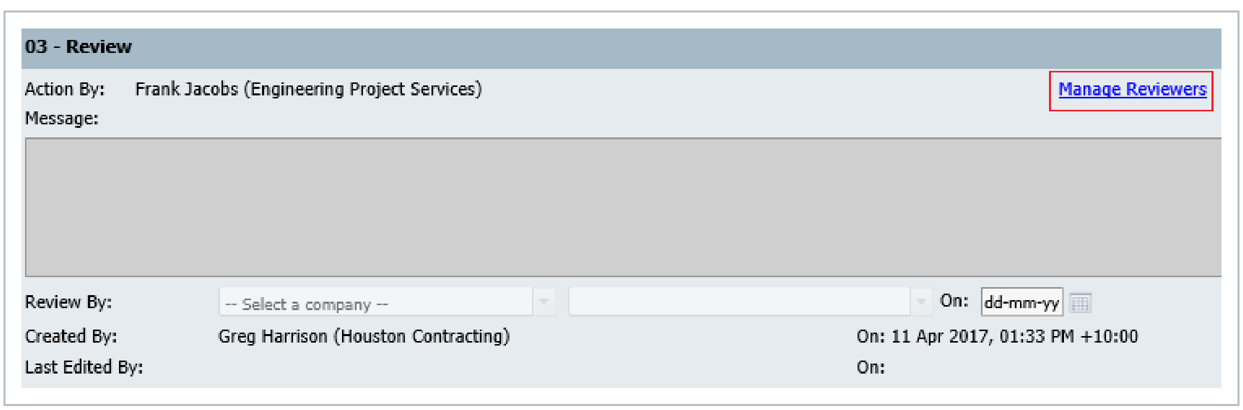
1. Once notified there is a Form available to update, access it by selecting the “Awaiting Action/Review” link in the Forms widget on the Dashboard or choose the appropriate Form from the Forms Register using filters as needed.



2. Next, enter the required data in the relevant fields in the section(s) which have been enabled. If the Form is a Workflow driven Form, only one section will be available (all other sections will be greyed out), however, if it is a Non-Workflow Form, then all sections the reviewer has access to can be completed at this time.

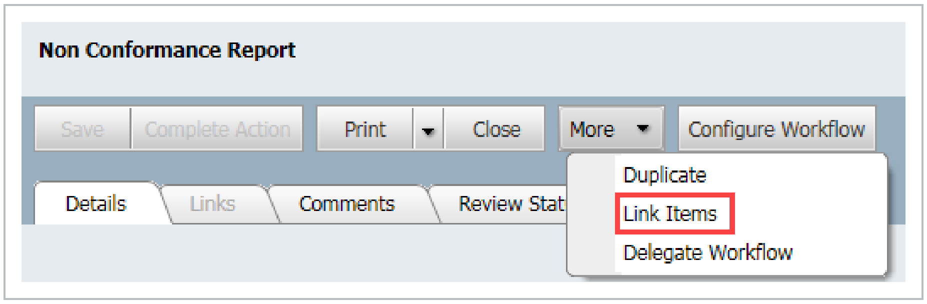


3. If needed, actions required for a Workflow Form section can be delegated to another Form Participant by anyone already assigned to the **For Action** field for the Section using the **Manage Reviewers** option from the relevant Section and assigning an alternative participant.

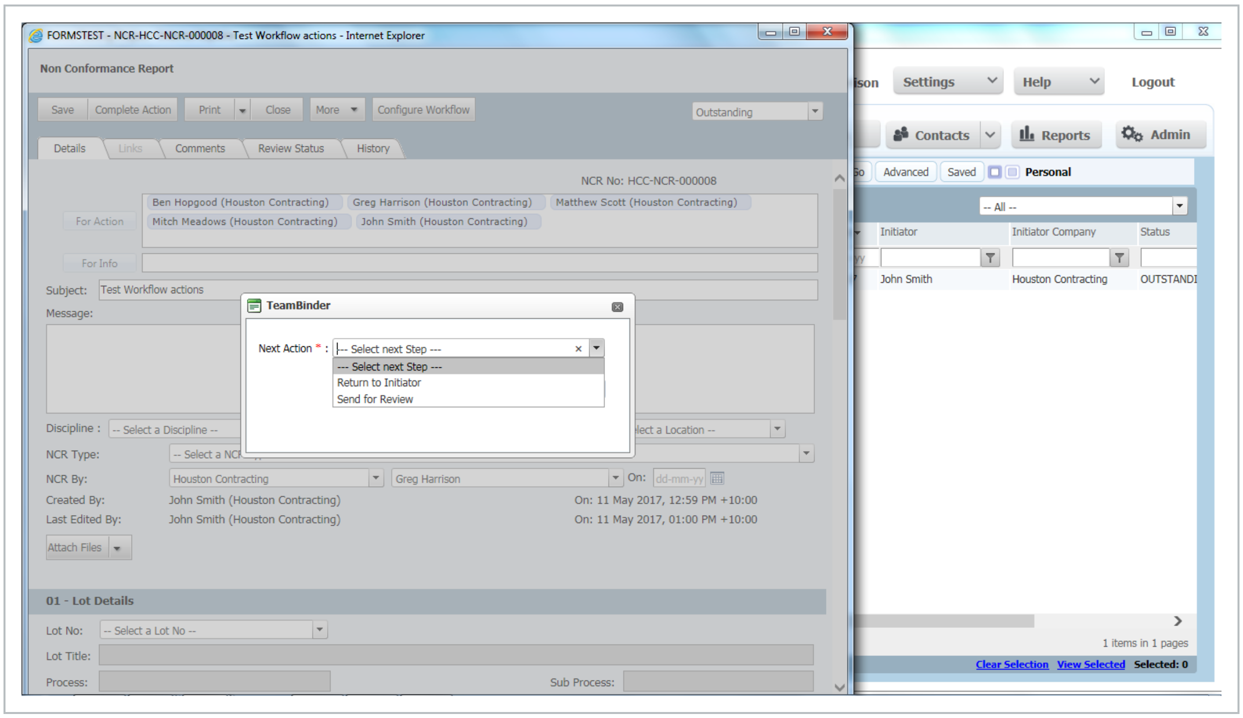


4. The Reviewer can link items from other InEight Document modules by selecting **More>Link**

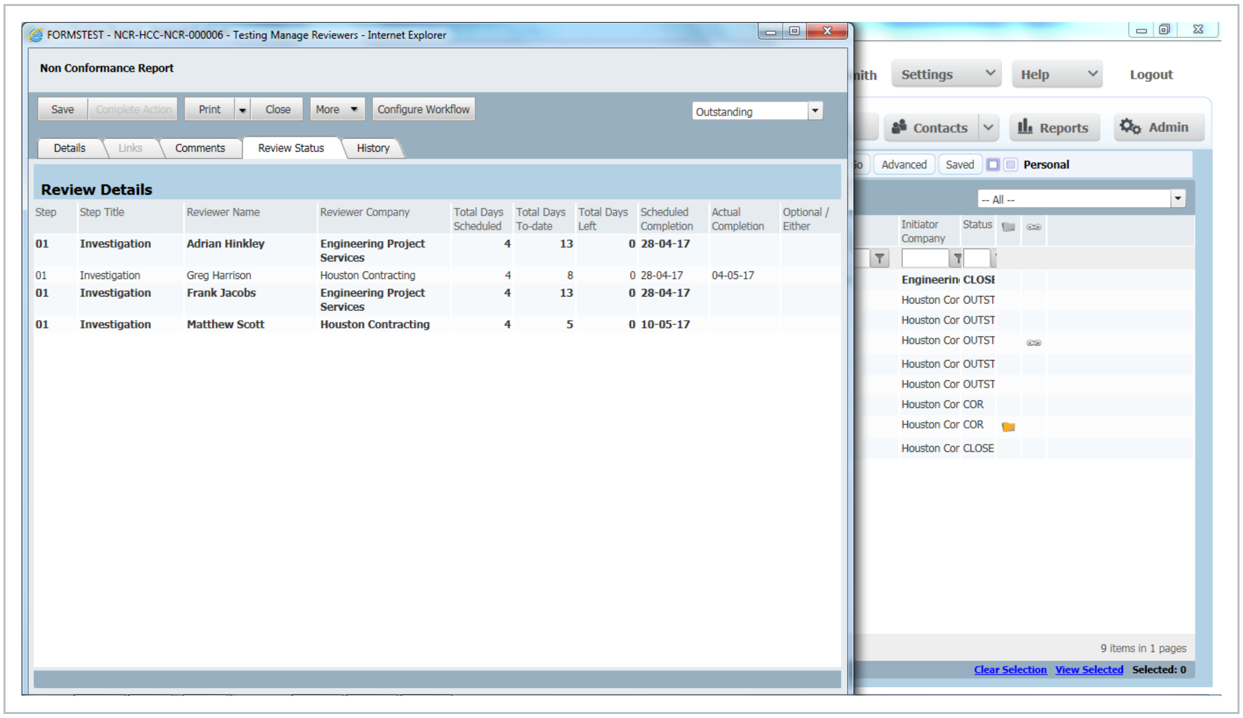
Items. These items will then be visible via the **Links** tab.



5. Once the Reviewer has finished they click **Complete Action**. If there is more than one possible next Step, this can be selected from the drop down options (e.g. Return to Initiator or Send for Review).



6. For **Workflow** forms, the Review status/current reviewer(s) can now be seen using the **Review** tab.



7. Once the final Step required for a Form has been completed and the Status updated to Closed Out the Form becomes locked and can no longer be edited. If required, an Administrator can reactivate the Form using the Form More button. If it is a Workflow Form, the step the Form should be reactivated from can also be defined.

If at any time the Form is cancelled, details are updated or comments sent to Form participants, they will be notified by email, so long as these notifications have been enabled in **User Preferences > Notifications**.

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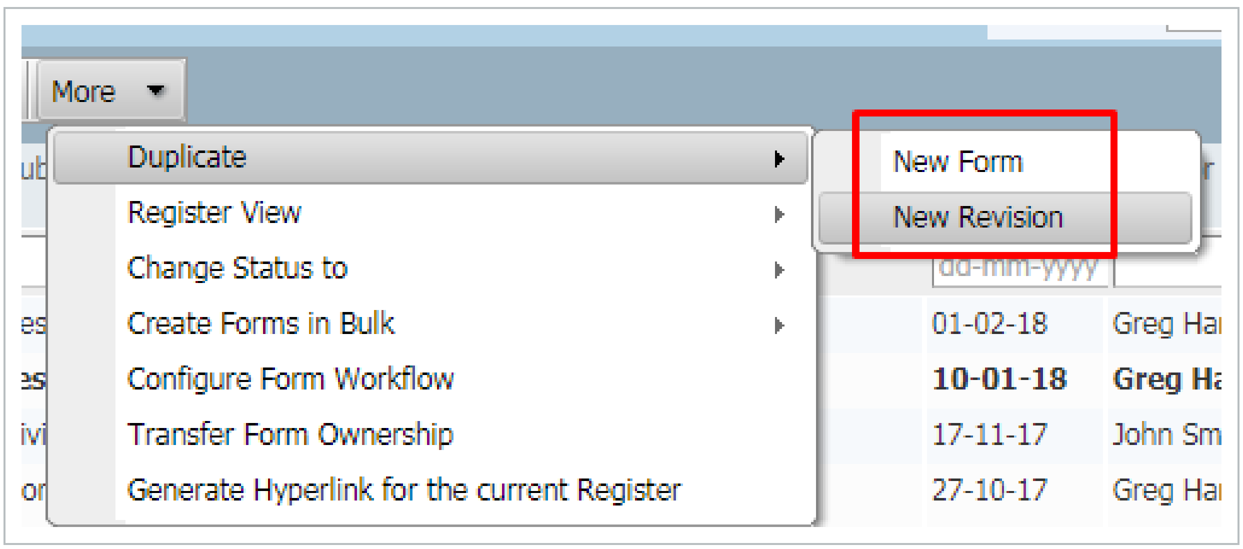
CHAPTER 5 – ADDITIONAL FORM OPTIONS

5.1 DUPLICATING FORMS

1. From the Forms Register select the Form to duplicate.



2. Select the **More** button then **Duplicate**.
    a. If **New Form** is selected, then a new form of the same type is duplicated with the header information copied over. The numbering of the new form is the next sequential number for the given combination (i.e. if the last RFI created was QAS-RFI-0004 then this form will be QAS-RFI-0005).

b. If **New Revision** is selected, then as with “New Form” all header information is copied over. The numbering will however inherit the parent number and a version counter (i.e. in the case of QAS-RFI-0004 being duplicated as a new Revision it would be numbered as QAS-RFI-0004.01). This is useful for Forms where resubmission of the same content is required in the case of the first submission being rejected (i.e. Submittal Forms).

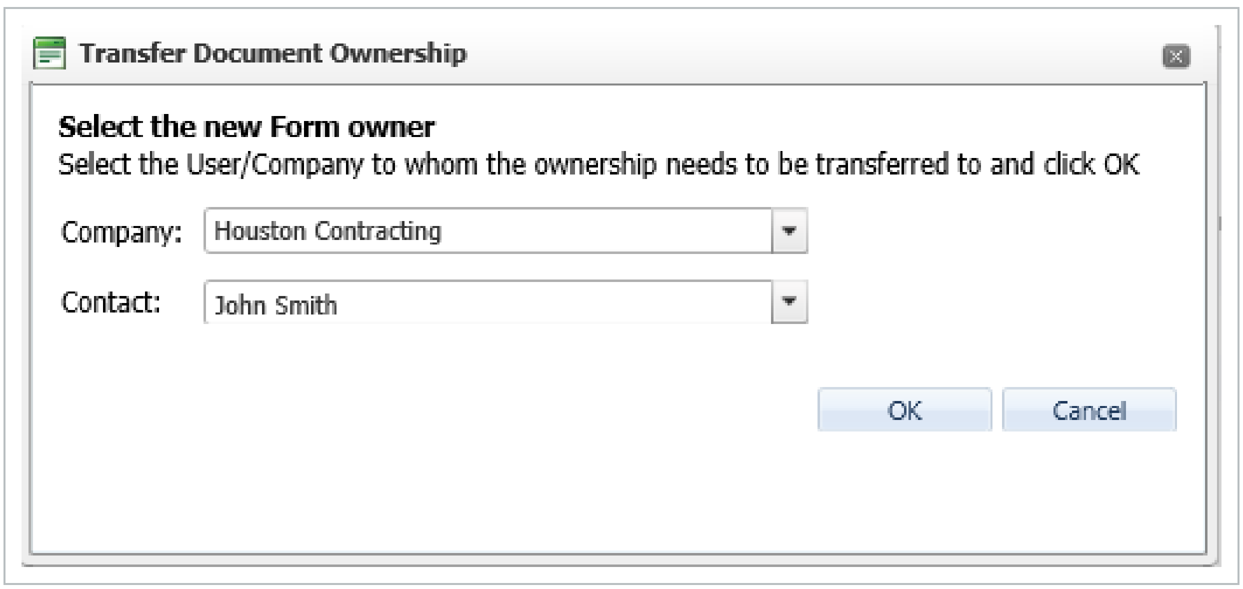
NOTE

- The user must have access to create a new Form for the Form type to be duplicated.
- The duplicated Form will include the original forms initiator section including recipients, attachments and links.

5.2 FORMS OWNERSHIP

If the owner of a Form leaves the project, ownership of the Form can be transferred to another user.

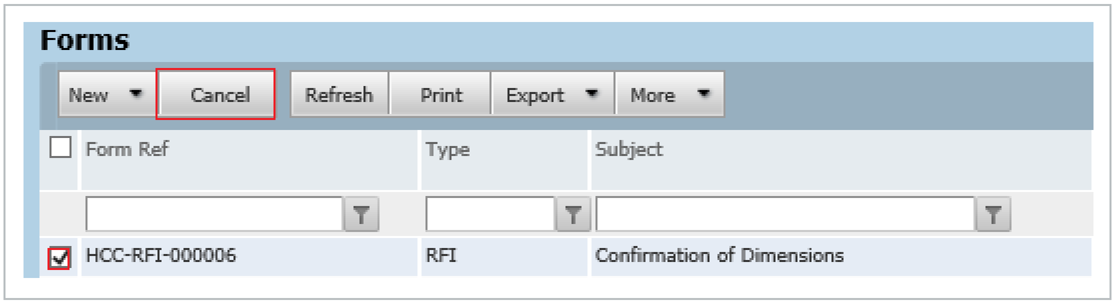
1. From the Forms Register select the relevant Form and click **More**.
2. Select **Transfer Form Ownership** and update the Owner details.



5.3 CANCELLING A FORM

To be able to cancel a form the User needs: Full access to the Forms module; Send Access to the Form Type; and for the Form to have been initiated by their company.

1. From the Forms register select the relevant Form and click the **Cancel** button above the register.



2. Provide a reason for cancelling the Form.

NOTE

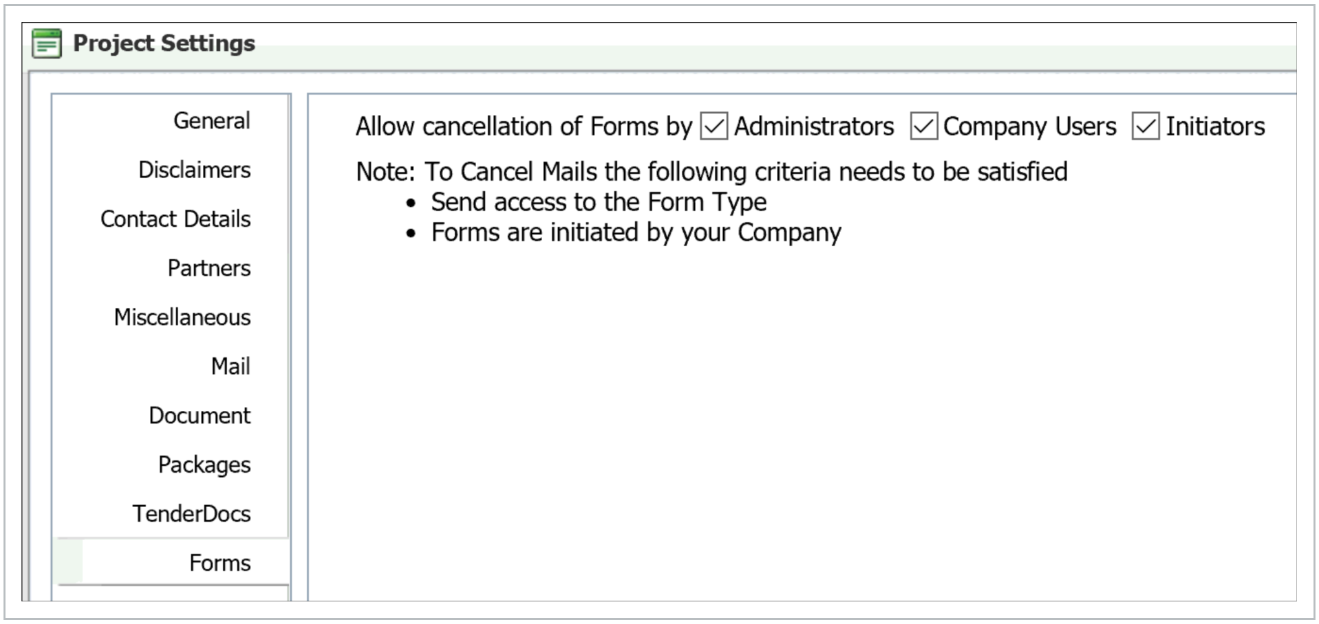
- Once the Form is cancelled Form access is removed and it will be removed from the register.
- The Form can still be filtered and retrieved via the Reports or Advanced Filter options on the Register.

5.3.1 Form Cancellation – Permissions

Administrators control the global settings for who is able to cancel a form via the Forms Tab within Project Settings.

The options are:

- Administrators (includes Primary, Additional, and Company Administrators); and/or
- Company Users; and/or
- Form Initiators.

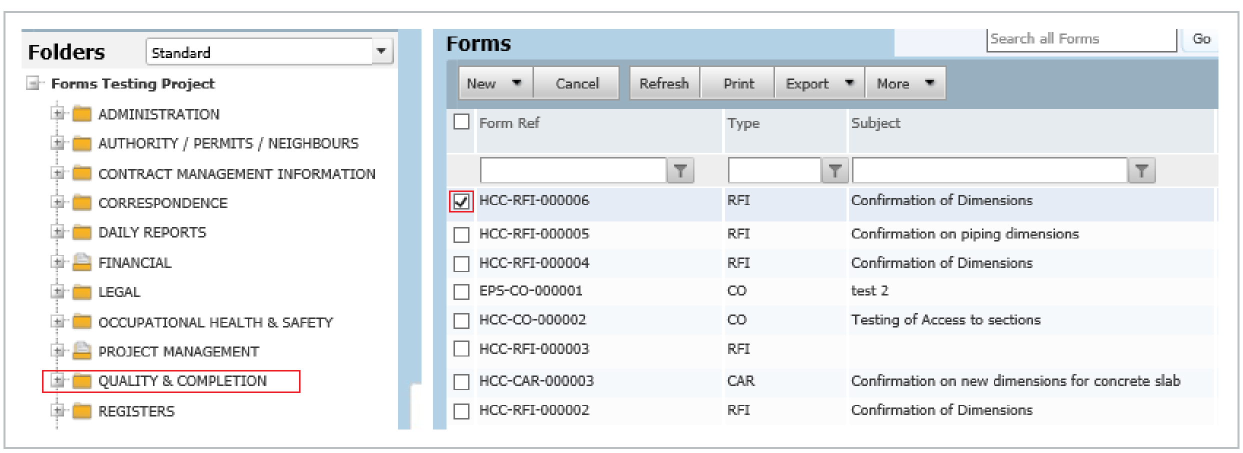


NOTE

- To be able to cancel a form the User needs: Full access to the Forms module; Send Access to the Form Type; and for the Form to have been initiated by their company.
- For existing projects (prior to 5.29), all three options for cancelling forms will be ticked.
- For new projects, only the Administrators option will be ticked.

5.4 ASSIGN FORM TO FOLDER

1. From within the Forms register, ensure the Folders view is open and select the Form(s) to move.



2. Drag the selected item(s) into the required folder.

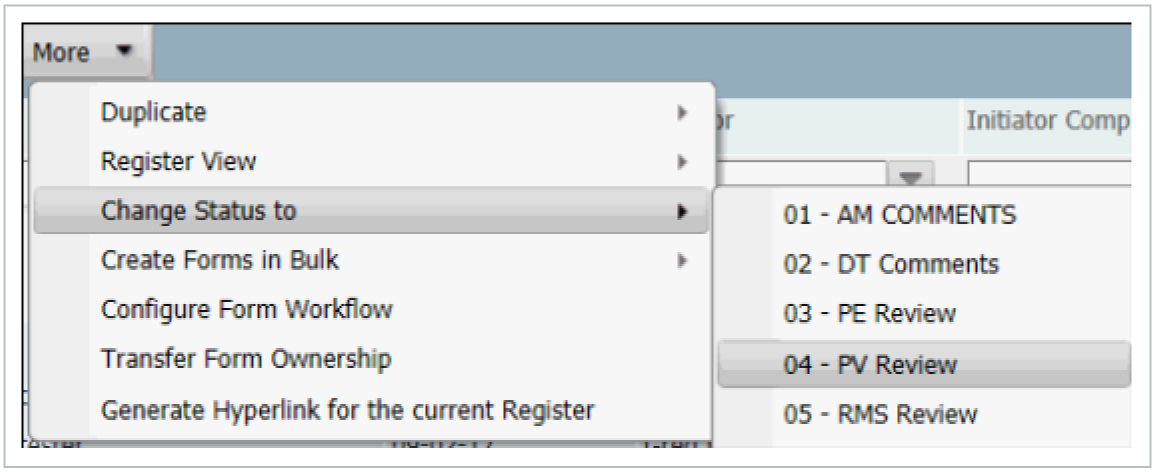
NOTE

- The Form within the folder is provided as a link to the Form in the register.
- Forms can also be allocated to smart folders in InEight Document.

5.5 CHANGE FORM STATUS IN BULK

It is possible to change the status of selected forms in a single action.

1. From within the Forms register select the forms requiring a status change.
2. Then click the **More** button and select **Change Status to** before selecting the Status to apply to the selected forms.



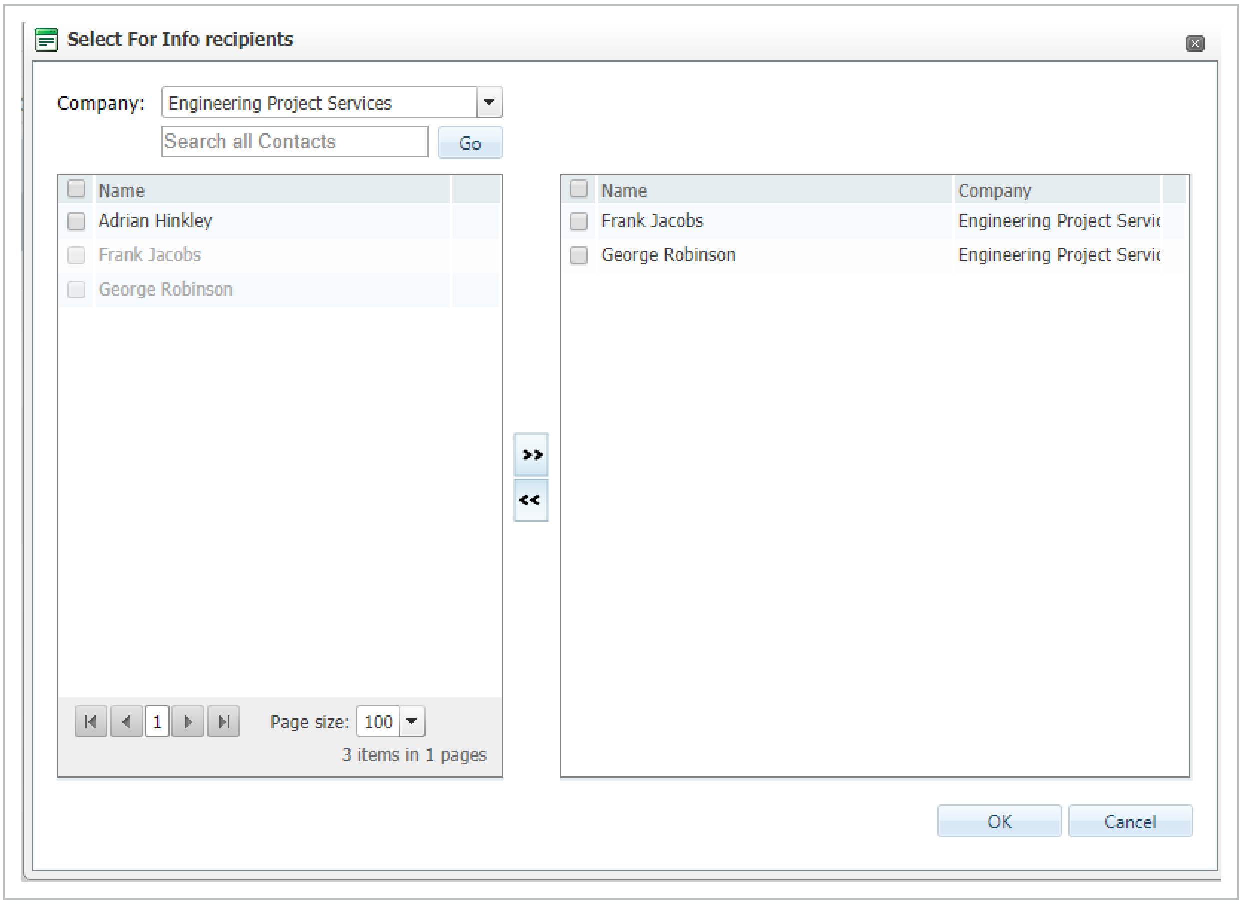
NOTE

This process will take into consideration the Form setup (whether or not you are a recipient on the form) and user access to change the Status (if for example manual status change is disabled).

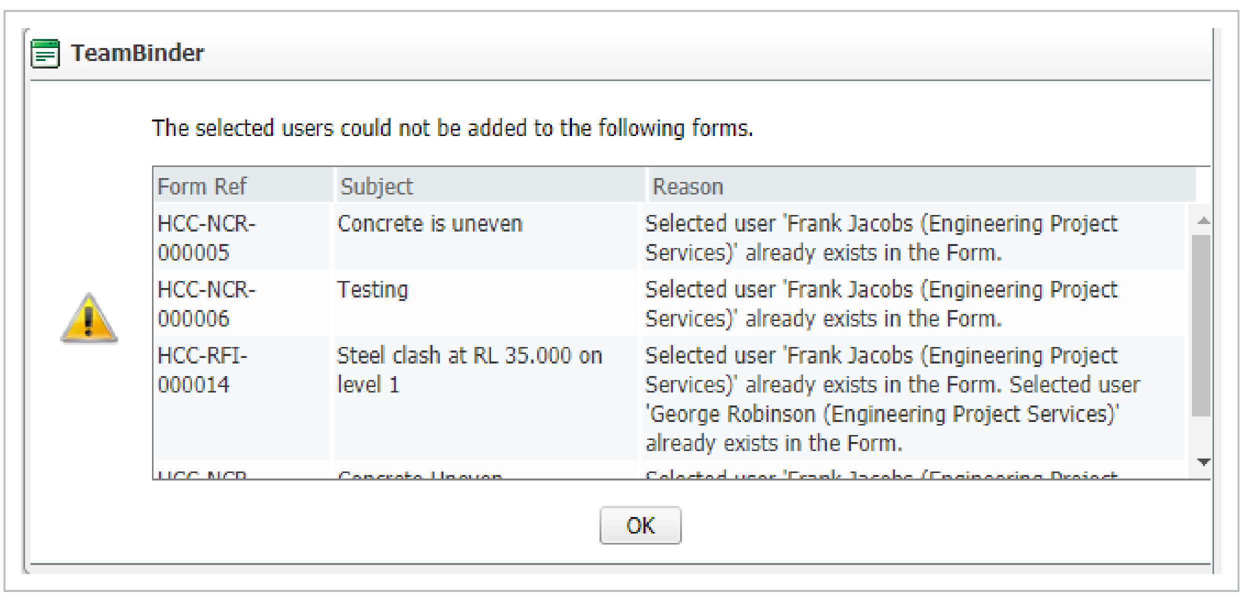
5.6 PROVIDE BULK FORM ACCESS

This option allows for users to be added to the For Information section in bulk. This is useful at the end of the project where another party may require to audit the forms generated during the project without having to re-activate each of the forms individually.

1. Select the appropriate the form(s).
2. Click **More** and select **Provide Bulk Form Access**.
3. Add the required For Information Recipients.



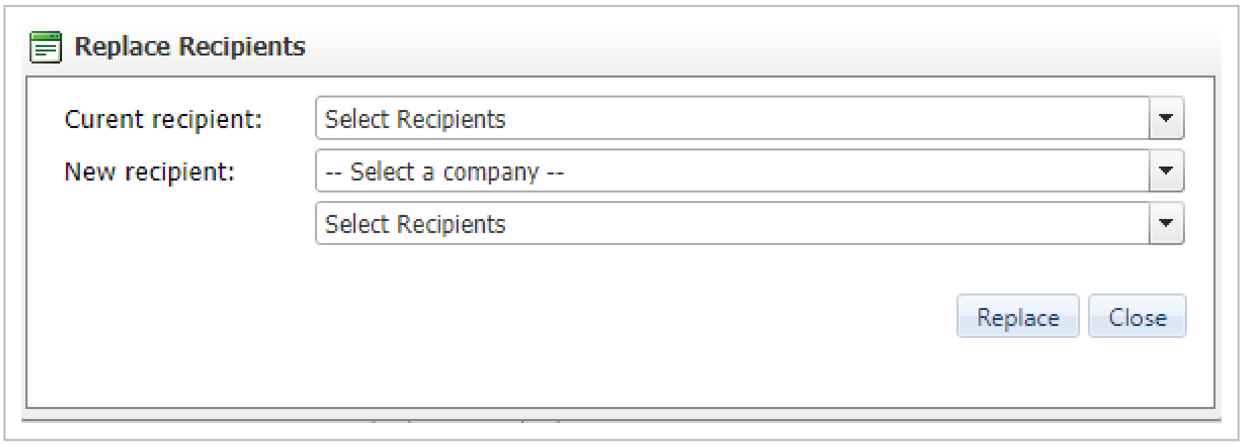
4. If users exist on the form in the For Action or in the Form Information field they cannot be added back in.



5.7 REPLACE / REMOVE RECIPIENTS IN BULK

This option allows for changes to be made to the form recipient list in bulk if a form participant no longer is required for a particular action. If the user has completed their step, then they cannot be replaced.

1. Select the appropriate the form(s).
2. Click **More** and select **Replace (or Remove) Recipients**.
3. Select the Current Recipient (only recipients for the forms selected will show here).



4. On clicking Replace (or Remove) the recipients are removed in bulk.

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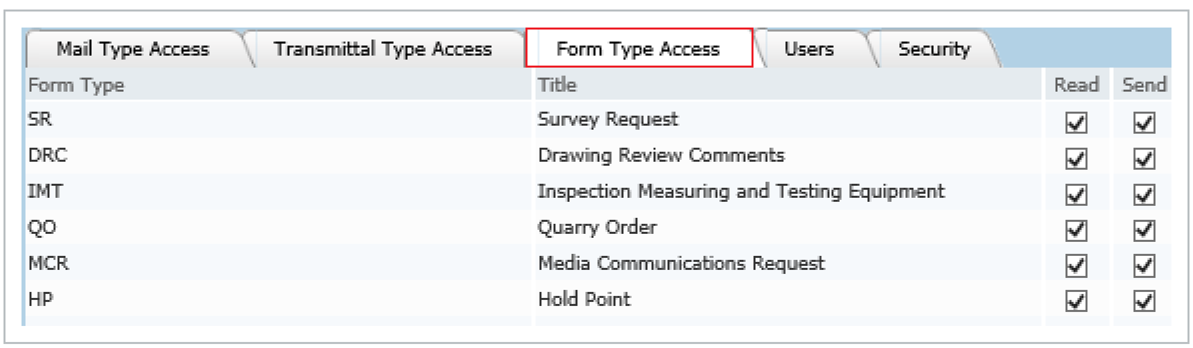
CHAPTER 6 – USER SECURITY

Access to Forms can be controlled at a Module (Security Group), Form, Section or Step level.

6.1 MODULE LEVEL FORM ACCESS

Access to the Forms module is controlled at three levels:

1. By **Security Group** to define whether users in a group have personal, Department or Company level access to Forms.
2. For Users within each Security group, you can define whether users will have Read / Send or No access in regard to each of the available Form types:
   Read: A user can contribute to a Form or be part of the Form's distribution List (For Action or For Information).
   Send: The user has access to initiate this type of Form via the **New > Forms** menu.



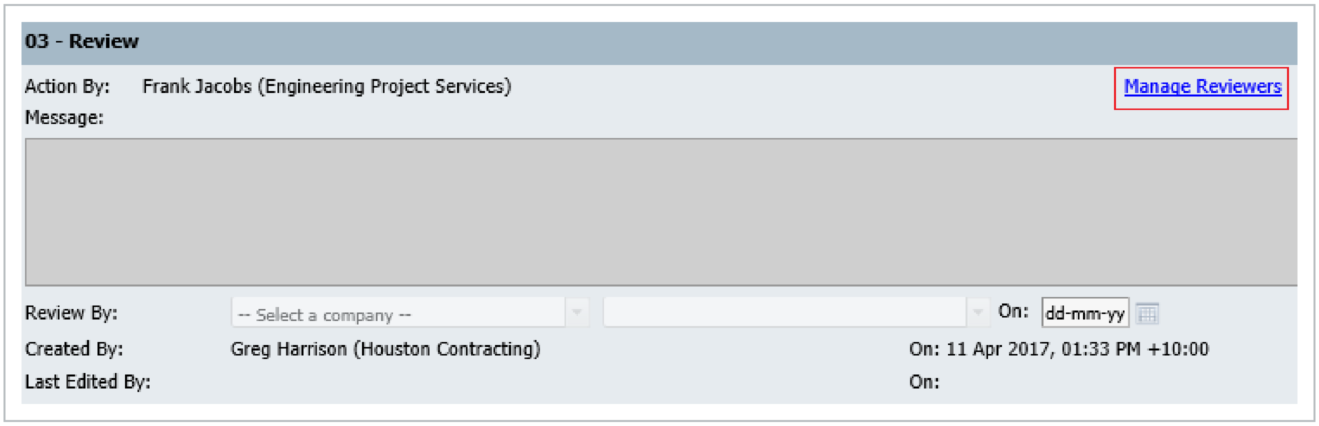
Form Type	Title	Read	Send
SR	Survey Request	☑	☑
DRC	Drawing Review Comments	☑	☑
IMT	Inspection Measuring and Testing Equipment	☑	☑
QO	Quarry Order	☑	☑
MCR	Media Communications Request	☑	☑
HP	Hold Point	☑	☑

3. On a per Form basis, access is controlled based on whether users are listed as For Action or For Info and is then controlled on a per section basis – see below.

6.2 FORM LEVEL ACCESS

Access rules per Form are as follows:

- Users who have Department/Company access to Forms can view forms assigned to any users in their company.
- The Initiator is the creator of the Form.
- The Receiver is any user in the **For Action** or **For Info** distribution list on the Form.
- **For Info** is used for participants that are not required to fill in a particular section.
- User with **For Action** access to a Section can specify reviewers or delegate by clicking on the **Manage Reviewers** link from the **Review** window.



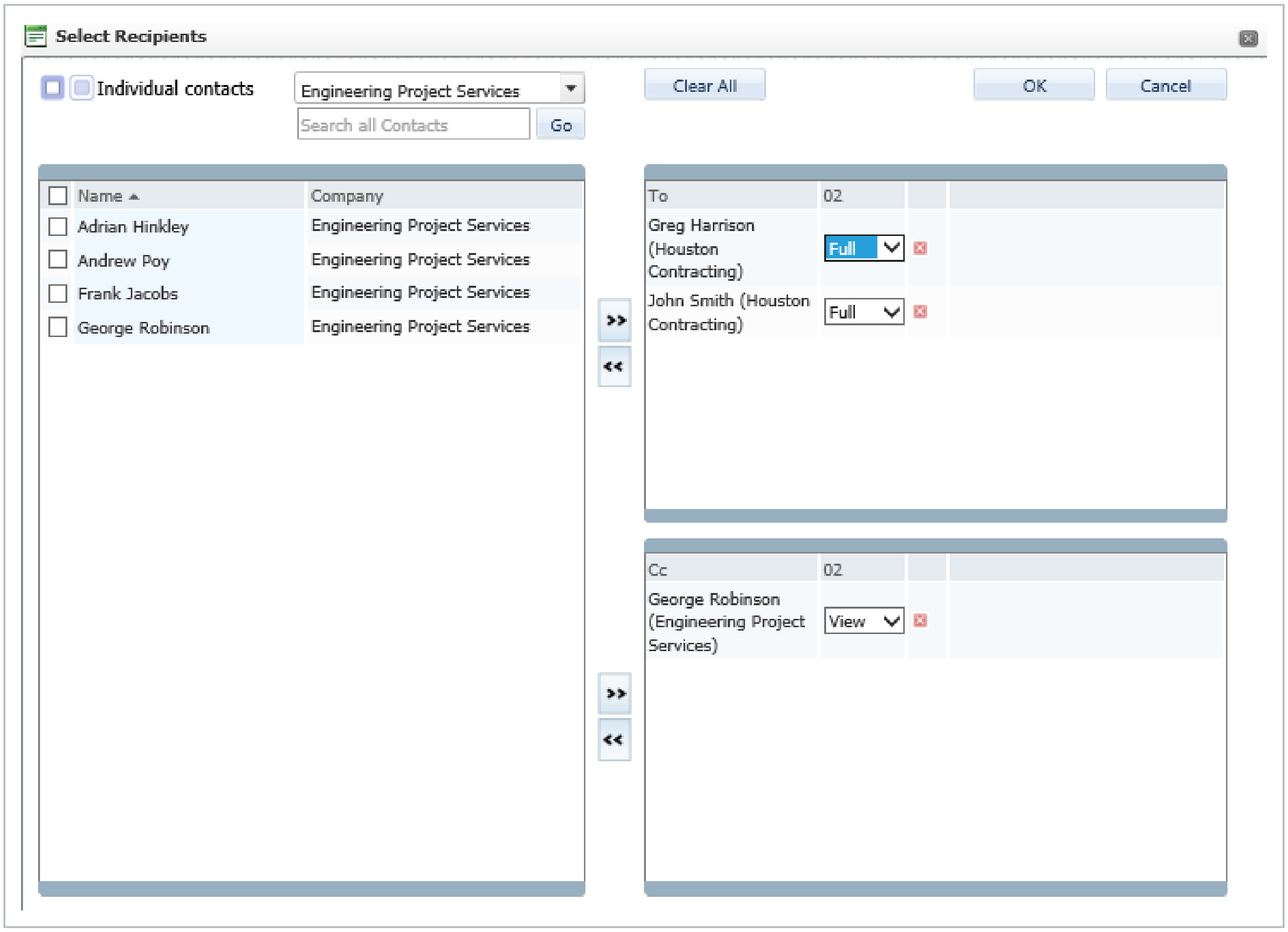
6.3 SECTION LEVEL ACCESS

In addition to the standard access rules, the level of user access can be modified when the recipients are added to the “To” section of the Form.

None: The user will not have access to that Section of the Form. The history of the specific Form section will not be visible to any user with None set as their access.

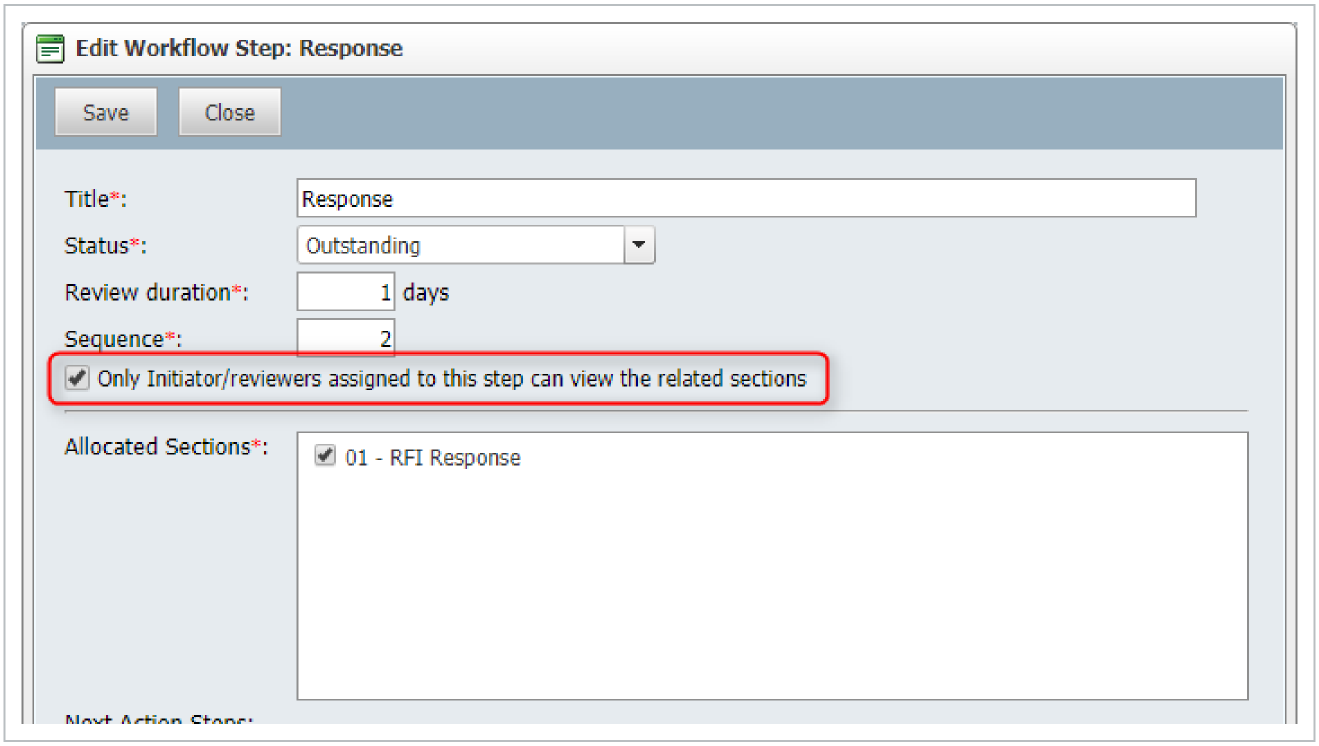
View: The user can only view the Form.

Full: The user can create and fill out certain sections of the Form.



6.4 STEP LEVEL ACCESS

When creating a new form, it is possible to control the visibility of Steps by restricting the viewing of a step to only the form initiator and reviewers. As with None level section access, the history of the specific Form section will not be visible to any user with None set as their access.



This feature also applies at a Form Type level so that visibility can be defined at a form type level and then new forms of this type will inherit this setting (with the provision for the Initiator to change it if required).

NOTE From within the Forms register, select **Configure Form Workflow** form the **More** button and then click the **Add/Edit** link in the Workflow column against the required form type. Then click the **Configure** link against the required step to load the above screen.

CHAPTER 7 – WORKFLOW FORMS

A Workflow Form is used when a Form requires a number of steps and contains one or more sections that need to be completed by one or more recipients (such as a Request for Information). Each step is assigned a status that identifies the current status of the Form. At the completion of each step there are one or more possible outcomes that determine which Step is executed next.

By comparison Non-Workflow Forms consist of only two elements, the Initiators Section and the other sections which are all enabled and modifiable by anyone with access, once the Form is initiated and published.

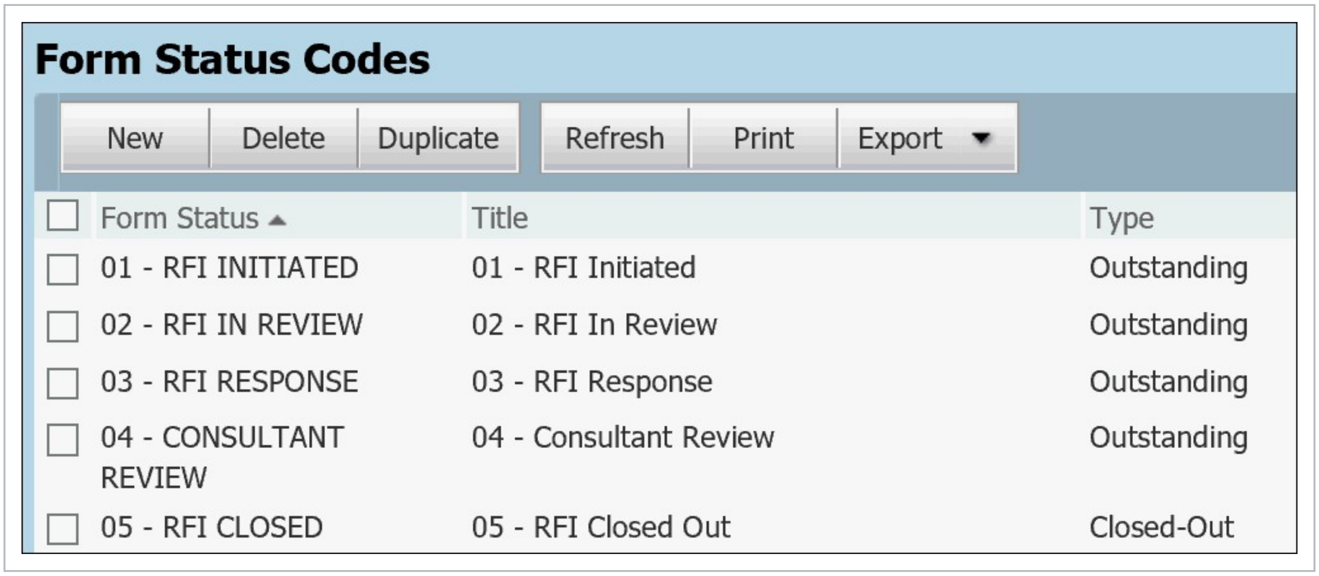
7.1 PREPARING A WORKFLOW FORM

Before activating a workflow Form for the first time the following preparation is required:

1. Status codes (if required) need to be configured.
2. Workflow steps defined.
3. Form participants (distribution list) assigned.
4. Status codes allocated.

7.1.1 Status Codes

Form Status Codes are used to help recipients quickly identify which step a Form is at and therefore what action is required. The library of available Status codes is defined by the Administrator via the Configuration Tables. The available status codes can be defined to be used generically on different form types or can be defined specifically for each form type.



NOTE

- Forms display the status dropdown in order of the Title values.
- For Workflow based forms, status values are assigned per workflow Step.
- For Non-Workflow forms, one or more status values are generally associated with them.

7.1.2 Define Workflow Steps

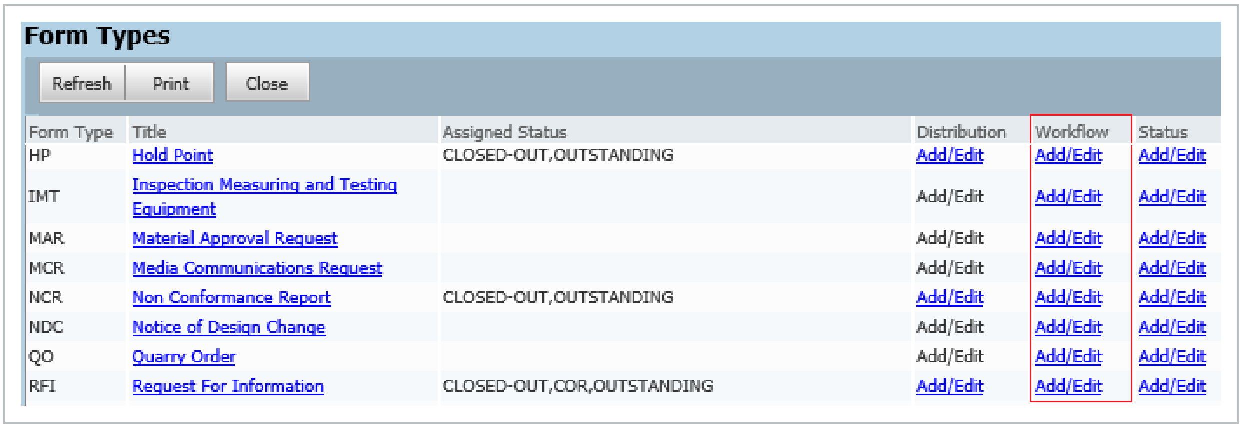
Workflow Steps combine logically to Form a workflow that determines the process by which recipients perform actions relating to each section of the Form.

- A Form must have a mandatory Start Step (that initiates the Form) and an End Step (that closes out the Form).
- Each Step (including the Start Step) must have one or more sections allocated to it.
- Each Step also requires one or more recipients who are given a completion date. All recipients must complete the Step by that date, unless they have been marked as **“Optional”** or there are two recipients who have both been marked as **“Either”.**
- Each Step is also assigned a status. This will identify the status of the Form as it moves through the workflow.
- At the completion of each Step (once the **Complete Action** button is clicked) a number of **“Next Actions”** are presented to the user. Each Next Action will drive which workflow step is executed next. For steps that are assigned to multiple recipients, it is the last recipient to complete the

step that selects the Next Action. The Next Action can also be assigned a status. In this case it will override the Step Status.

The Workflow for a Form can be setup from the Forms Type window.

1. From the Form Register click **More > Configure Form Workflow**
2. Click the **Add/Edit** link under the Workflow column for the appropriate Form type.

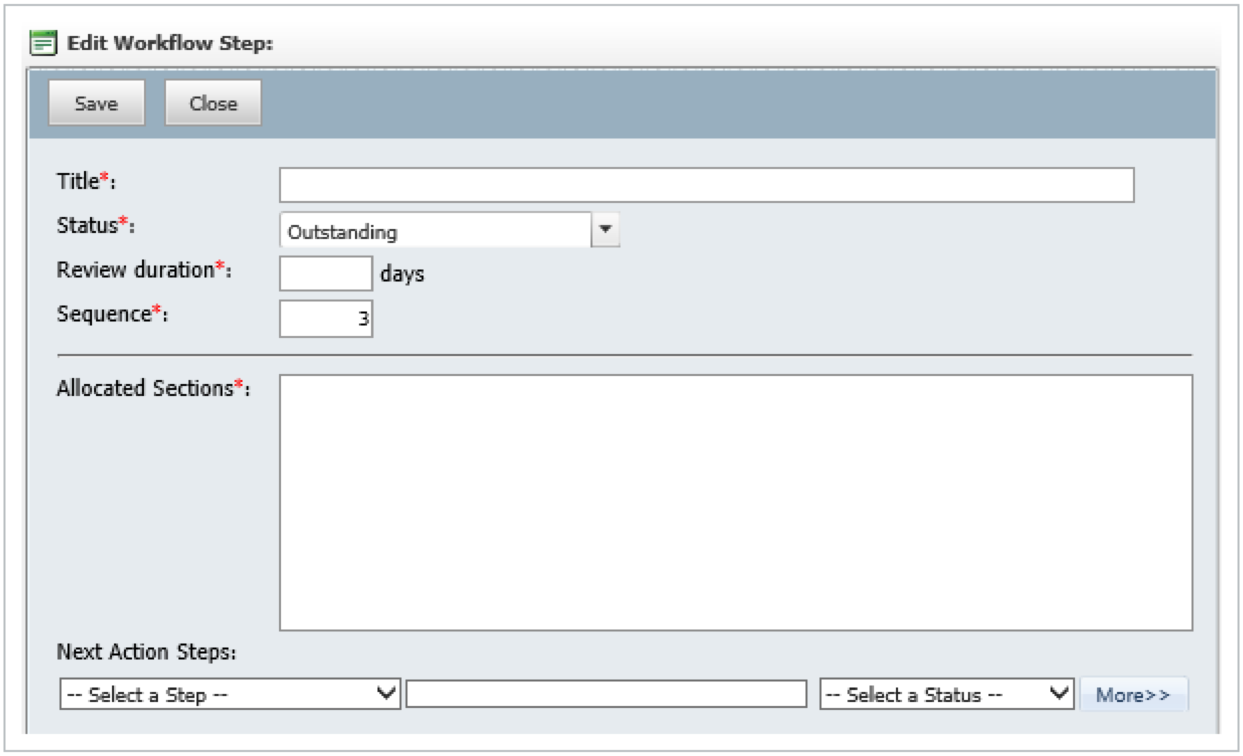


Form Types

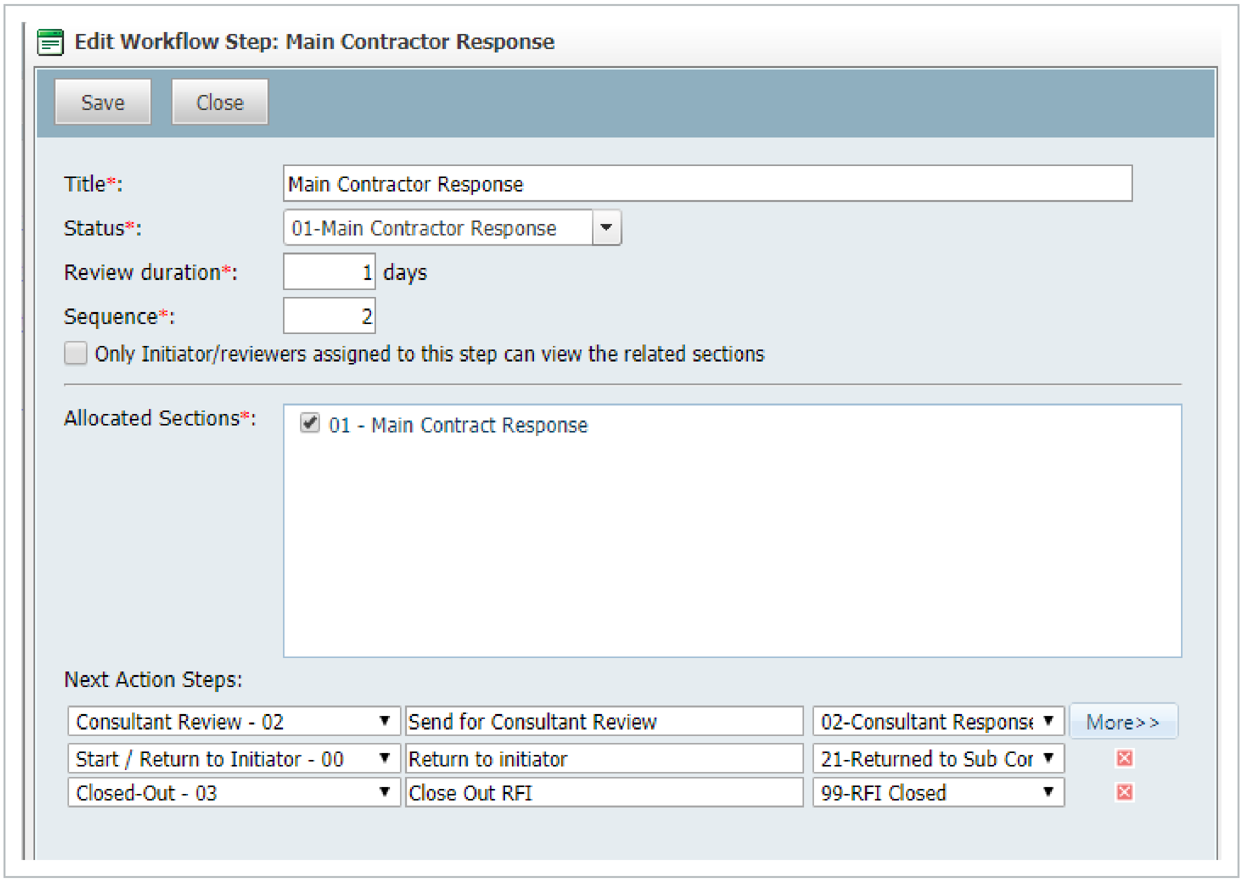
Refresh Print Close

Form Type	Title	Assigned Status	Distribution	Workflow	Status
HP	Hold Point	CLOSED-OUT,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit
IMT	Inspection Measuring and Testing Equipment		Add/Edit	Add/Edit	Add/Edit
MAR	Material Approval Request		Add/Edit	Add/Edit	Add/Edit
MCR	Media Communications Request		Add/Edit	Add/Edit	Add/Edit
NCR	Non Conformance Report	CLOSED-OUT,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit
NDC	Notice of Design Change		Add/Edit	Add/Edit	Add/Edit
QO	Quarry Order		Add/Edit	Add/Edit	Add/Edit
RFI	Request For Information	CLOSED-OUT,COR,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit

3. For each Step complete the following:
   a. Add a **Step** title.
   b. Select a **Status**.
   c. Add **Review duration**.
   d. Specify a **Sequence** for the Step.

4. 

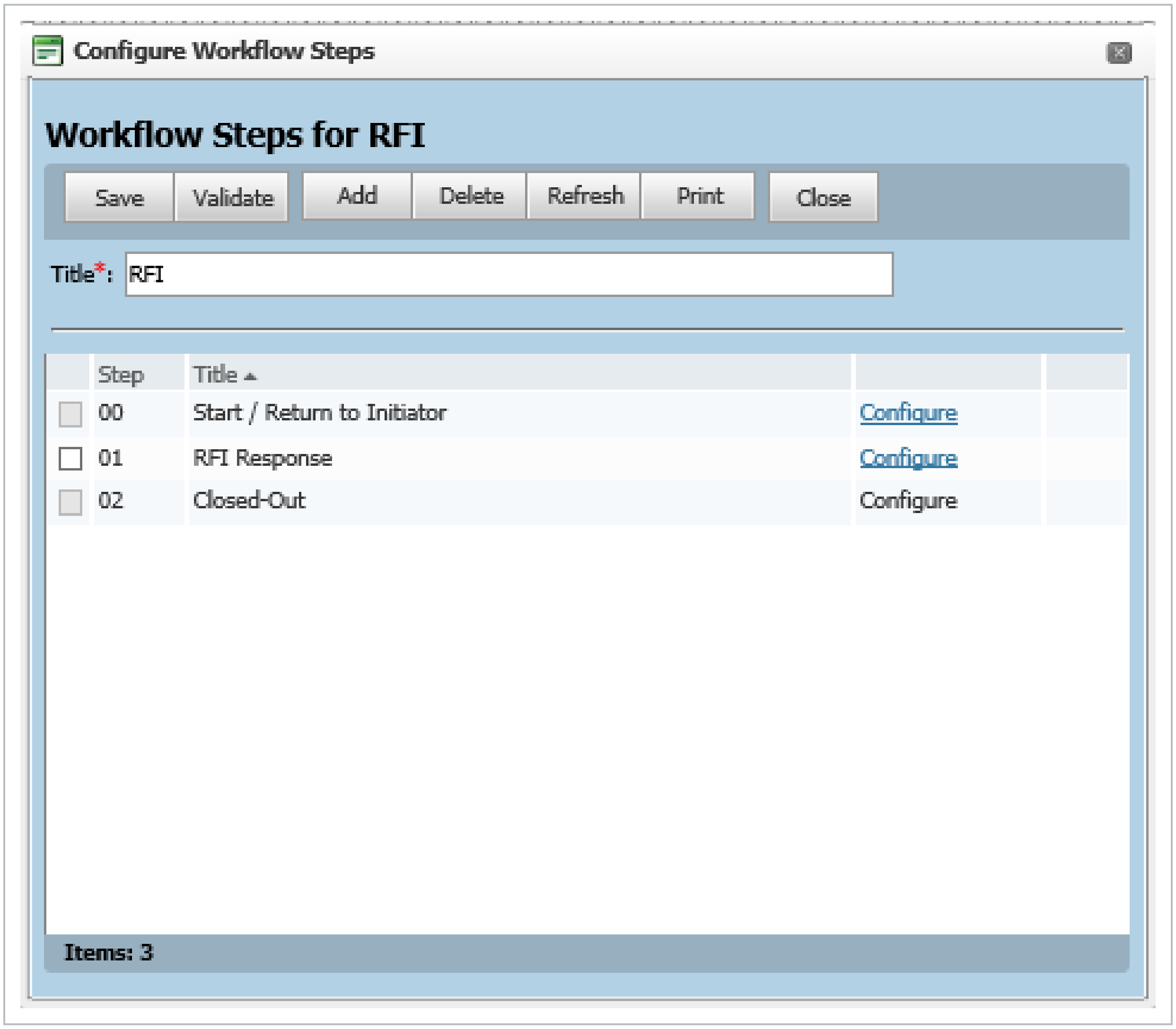
   Tick the allocated section(s).
5. Select the **Next Action Steps**.
6. Allocate the **Status** for the Next Action if required.
7. Specify multiple Next Action Steps by clicking **More** and selecting additional **Next Action Steps** and then selecting the **Status** for each Step.



NOTE

- It is possible to define the Next action to be the same step multiple times. But each time a different status must be assigned.
- The Closed-Out status can be pre-configured via the Form workflow window.

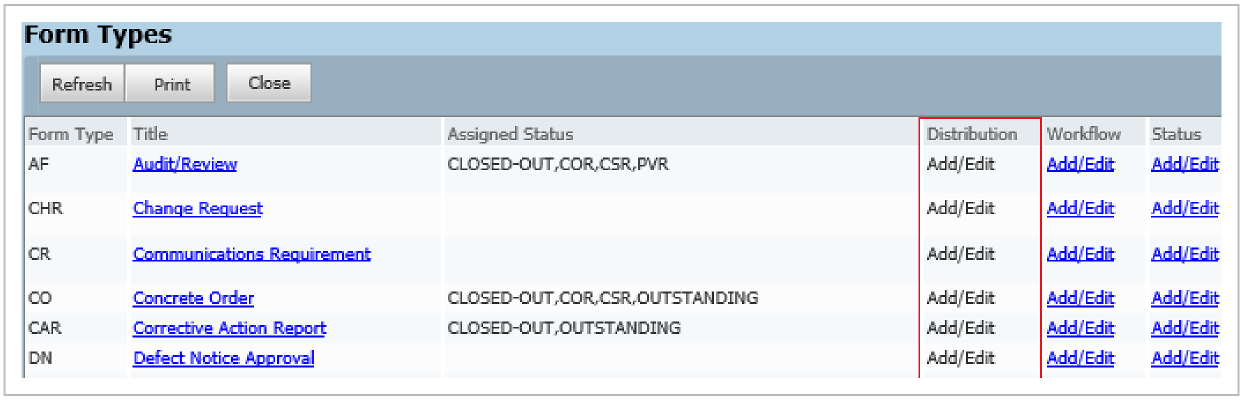
8. To make further changes to the workflow configuration once saved, use the Configure link from the Workflow Steps window.



7.1.3 Manage Reviewers and Distribution Groups

To create a default distribution list for Forms:

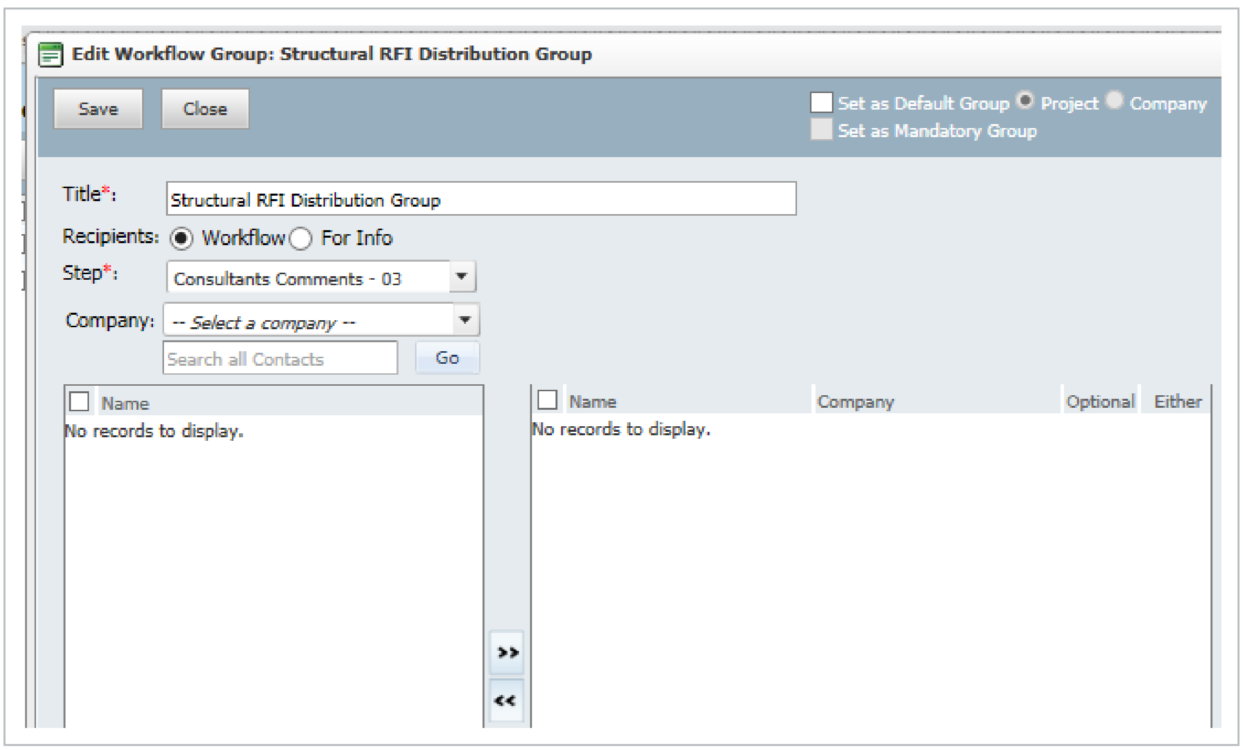
1. Within the Forms register, click on the **More** button and select **Configure Form Workflow.**
2. Click the **Add/ Edit** link next to the Form Type for **Distribution**.


Form Types

Refresh Print Close

Form Type	Title	Assigned Status	Distribution	Workflow	Status
AF	Audit/Review	CLOSED-OUT,COR,CSR,PVR	Add/Edit	Add/Edit	Add/Edit
CHR	Change Request		Add/Edit	Add/Edit	Add/Edit
CR	Communications Requirement		Add/Edit	Add/Edit	Add/Edit
CO	Concrete Order	CLOSED-OUT,COR,CSR,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit
CAR	Corrective Action Report	CLOSED-OUT,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit
DN	Defect Notice Approval		Add/Edit	Add/Edit	Add/Edit

3. Existing distribution groups are listed. Either Click on the distribution group title to edit an existing group or click **Add/ Edit** link under the Distribution column to create a distribution list for the Form type.
4. Specify a **Title** for the Distribution List.
5. Use the two radio buttons to select recipients to be assigned as part of the workflow (For workflow-based form types) and those who are going to be accessing the form For Info only.



6. Select the **Workflow** option.
7. Select the **Company** and **Contact**.
8. Add recipient(s) to the step using the arrows.

9. Click **Save** and **Close** once complete.

NOTE

- Responsible recipient(s) are allocated to one step at a time. Each workflow step remains active until at least one participant has been assigned.
- It is possible to allocate a Default Contact Group (that can be altered by the Initiator and other parties on the Form), for the entire Project or for the Company Initiating the Form.
- Default Groups can also be set to become Mandatory (which prevents any user in the group being removed for the given Form Type).

7.1.4 Allocating Status values for use with a Form Type

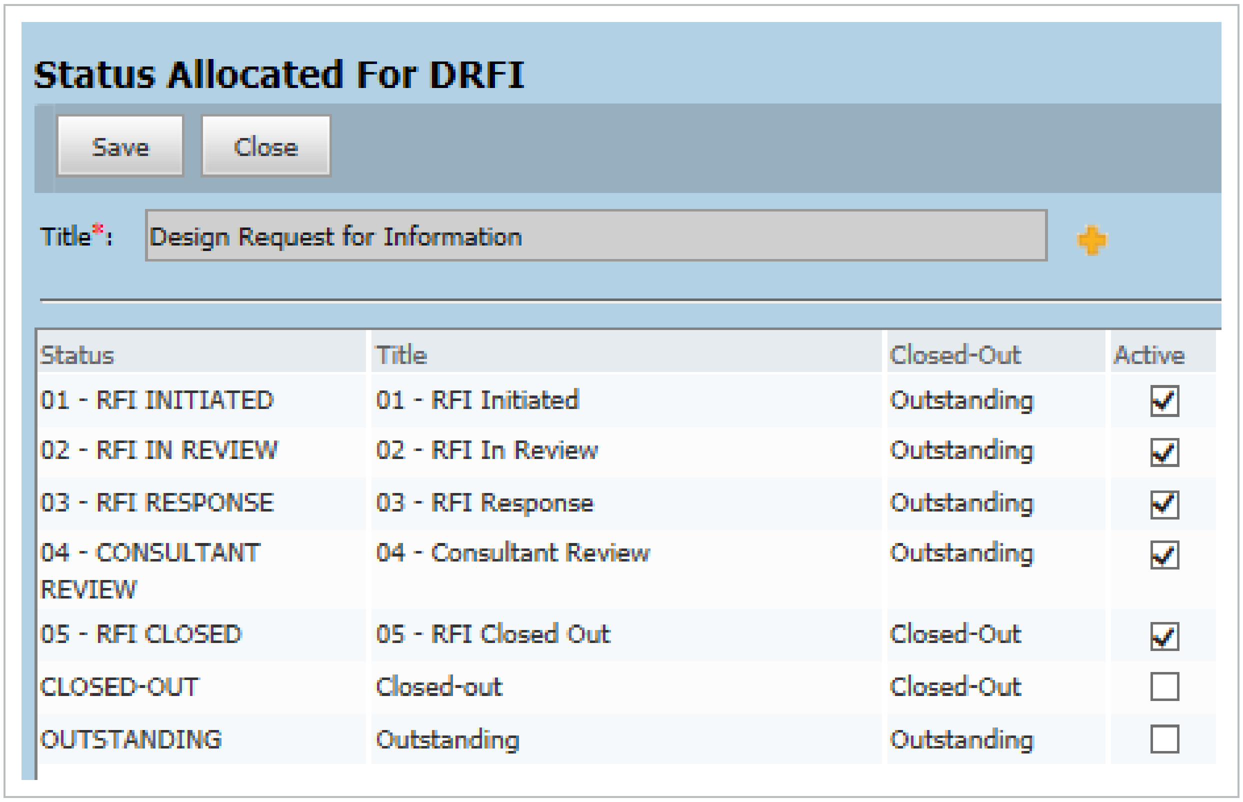
1. Within the Forms register, click on the **More** button and select **Configure Form Workflow.**
2. Click the **Add/ Edit** link in the **Status** column next to the appropriate Form Type or click on the Form Type Title.

Form Types

Refresh Print Close

Form Type	Title	Assigned Status	Distribution	Workflow	Status
HP	Hold Point	CLOSED-OUT,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit
IMT	Inspection Measuring and Testing Equipment		Add/Edit	Add/Edit	Add/Edit
MAR	Material Approval Request		Add/Edit	Add/Edit	Add/Edit
MCR	Media Communications Request		Add/Edit	Add/Edit	Add/Edit
NCR	Non Conformance Report	CLOSED-OUT,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit
NDC	Notice of Design Change		Add/Edit	Add/Edit	Add/Edit
QO	Quarry Order		Add/Edit	Add/Edit	Add/Edit
RFI	Request For Information	CLOSED-OUT,COR,OUTSTANDING	Add/Edit	Add/Edit	Add/Edit

3. Use the + button to assign which Form Status values are to be available for use with the Form Type.



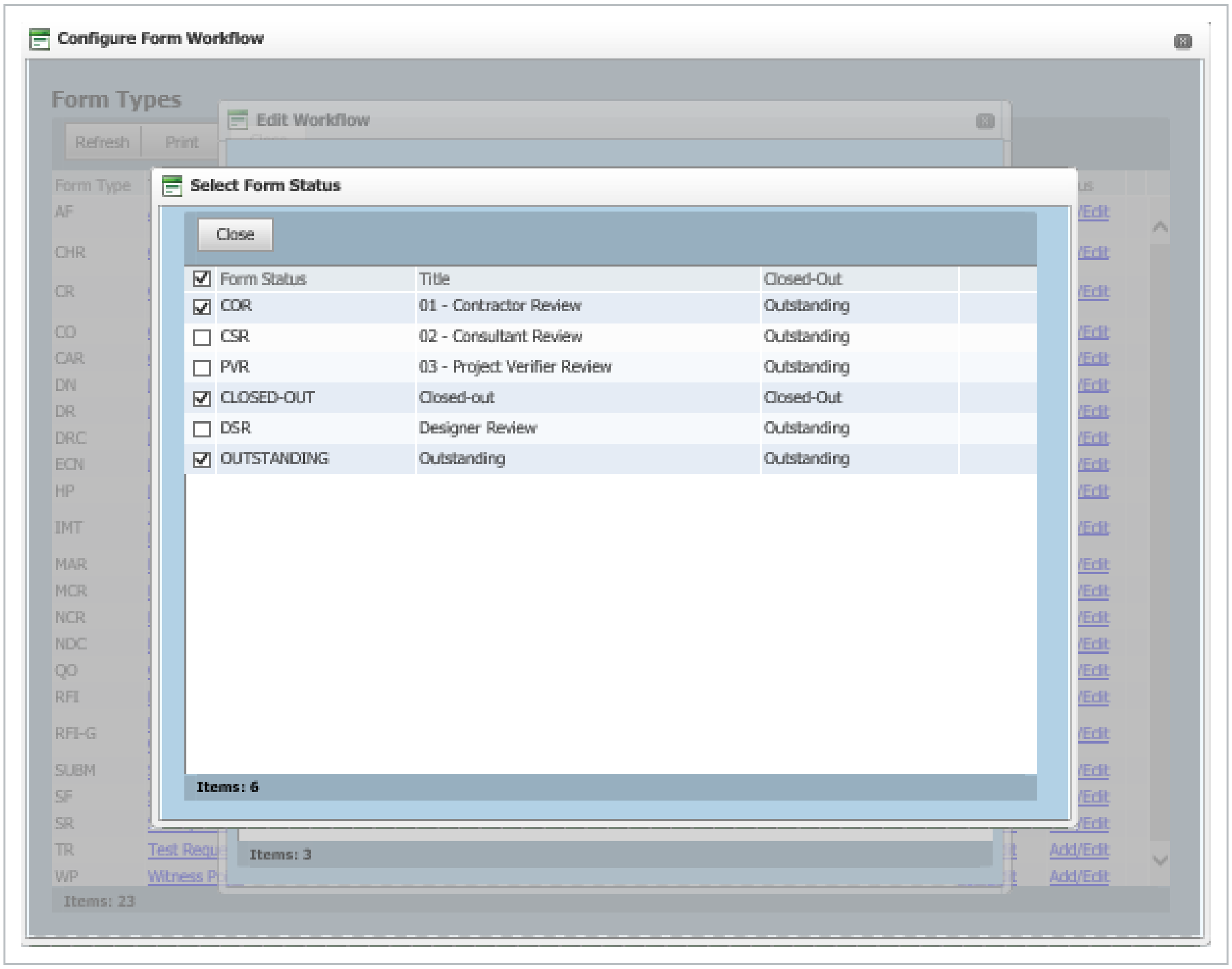
Status Allocated For DRFI

Save Close

Title*: Design Request for Information

Status	Title	Closed-Out	Active
01 - RFI INITIATED	01 - RFI Initiated	Outstanding	☑
02 - RFI IN REVIEW	02 - RFI In Review	Outstanding	☑
03 - RFI RESPONSE	03 - RFI Response	Outstanding	☑
04 - CONSULTANT REVIEW	04 - Consultant Review	Outstanding	☑
05 - RFI CLOSED	05 - RFI Closed Out	Closed-Out	☑
CLOSED-OUT	Closed-out	Closed-Out	☐
OUTSTANDING	Outstanding	Outstanding	☐

Note that the available Form Status values are defined by the Project Administrator.



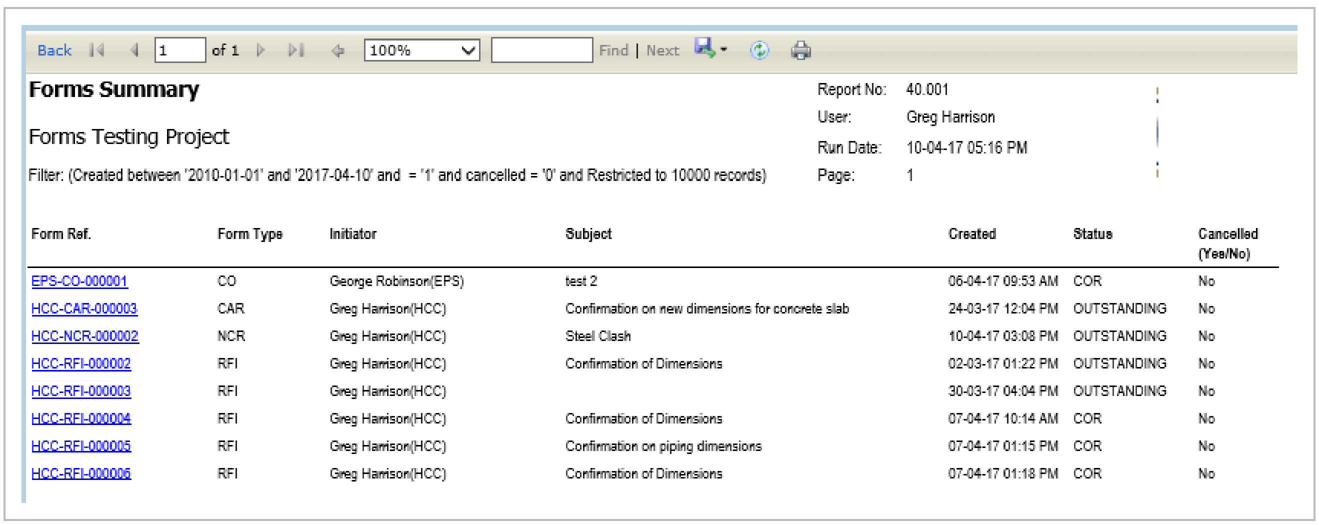
4. Select the required statuses to include for use with the Form Type.

CHAPTER 8 – FORM REPORTS

Form Reports can be found in the Standard Reports section of InEight Document.

8.1 001 - SUMMARY - REPORT

This report shows a summary of all Forms and details such as the initiator, Form type and cancelled forms.



Back 1 of 1 100% Find | Next

Forms Summary

Forms Testing Project

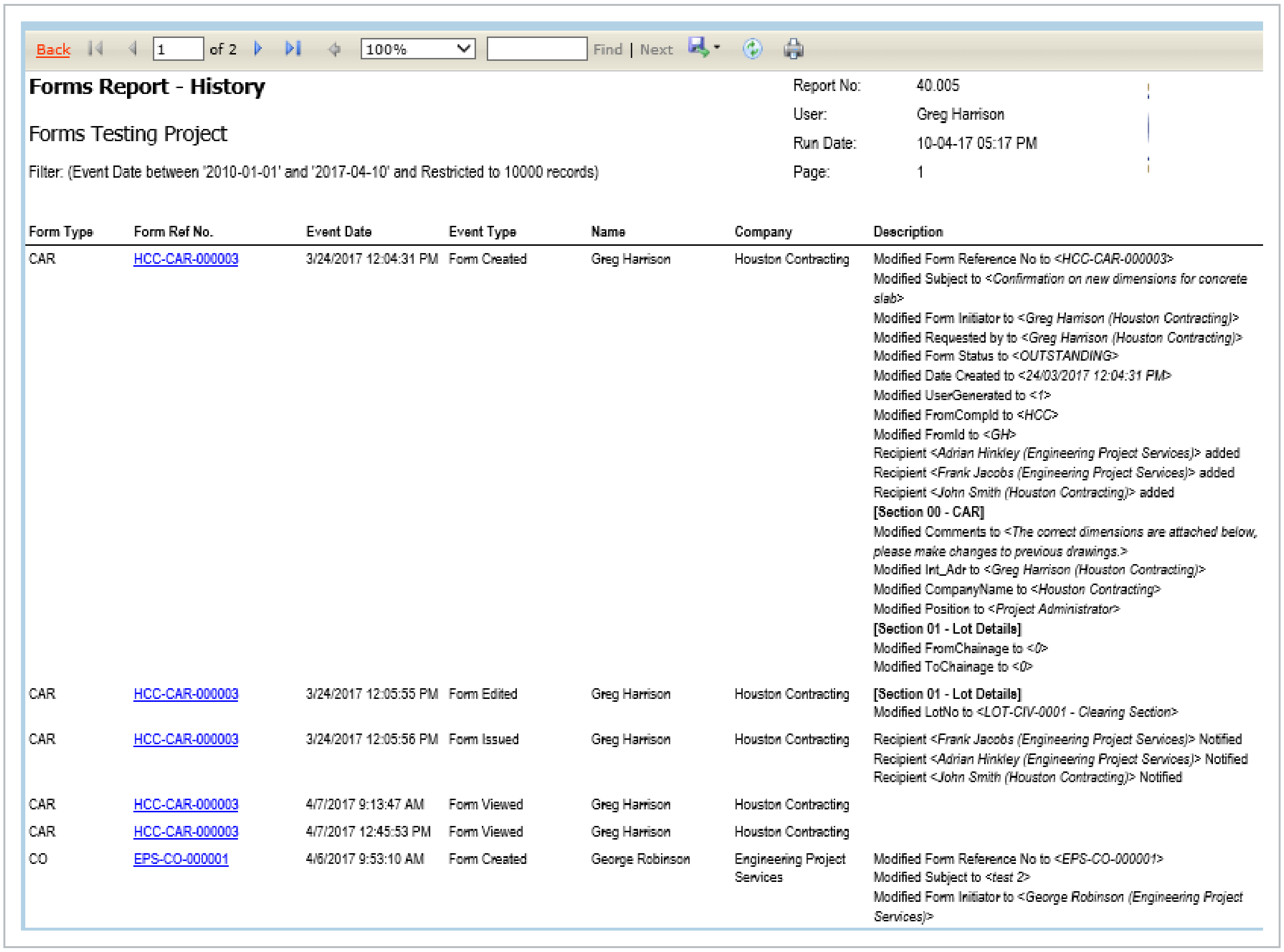
Filter: (Created between '2010-01-01' and '2017-04-10' and = '1' and cancelled = '0' and Restricted to 10000 records)

Report No: 40.001
User: Greg Harrison
Run Date: 10-04-17 05:16 PM
Page: 1

Form Ref.	Form Type	Initiator	Subject	Created	Status	Cancelled (Yes/No)
EPS-CO-000001	CO	George Robinson(EPS)	test 2	06-04-17 09:53 AM	COR	No
HCC-CAR-000003	CAR	Greg Harrison(HCC)	Confirmation on new dimensions for concrete slab	24-03-17 12:04 PM	OUTSTANDING	No
HCC-NCR-000002	NCR	Greg Harrison(HCC)	Steel Clash	10-04-17 03:08 PM	OUTSTANDING	No
HCC-RFI-000002	RFI	Greg Harrison(HCC)	Confirmation of Dimensions	02-03-17 01:22 PM	OUTSTANDING	No
HCC-RFI-000003	RFI	Greg Harrison(HCC)		30-03-17 04:04 PM	OUTSTANDING	No
HCC-RFI-000004	RFI	Greg Harrison(HCC)	Confirmation of Dimensions	07-04-17 10:14 AM	COR	No
HCC-RFI-000005	RFI	Greg Harrison(HCC)	Confirmation on piping dimensions	07-04-17 01:15 PM	COR	No
HCC-RFI-000006	RFI	Greg Harrison(HCC)	Confirmation of Dimensions	07-04-17 01:18 PM	COR	No

8.2 005 - REPORT - HISTORY

This report shows a Form's history details.



Back | 1 of 2 | 100% | Find | Next

Forms Report - History

Forms Testing Project

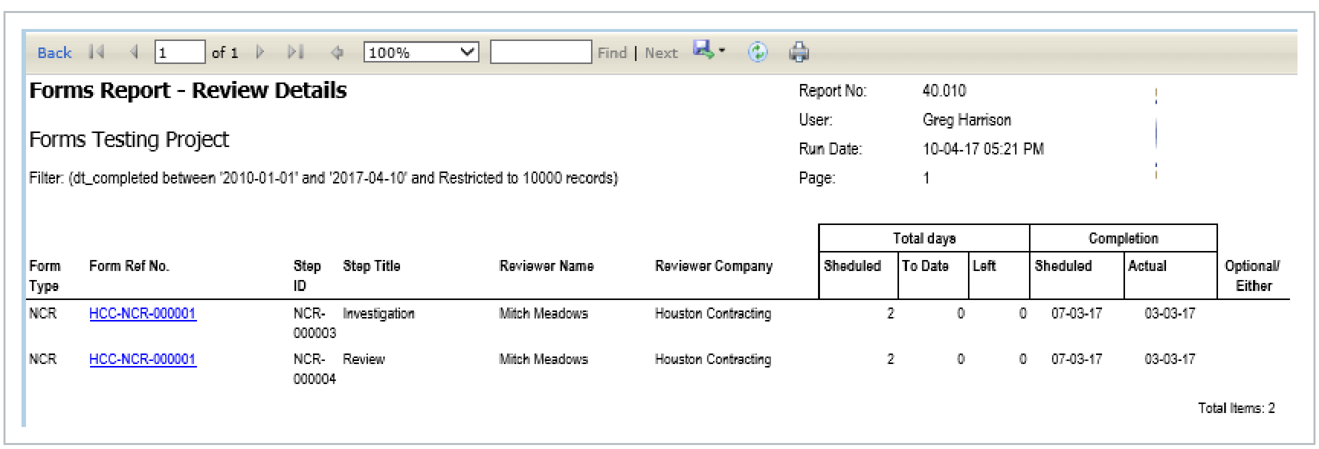
Filter: (Event Date between '2010-01-01' and '2017-04-10' and Restricted to 10000 records)

Report No: 40.005
User: Greg Harrison
Run Date: 10-04-17 05:17 PM
Page: 1

Form Type	Form Ref No.	Event Date	Event Type	Name	Company	Description
CAR	HCC-CAR-000003	3/24/2017 12:04:31 PM	Form Created	Greg Harrison	Houston Contracting	Modified Form Reference No to <HCC-CAR-000003> Modified Subject to <Confirmation on new dimensions for concrete slab> Modified Form Initiator to <Greg Harrison (Houston Contracting)> Modified Requested by to <Greg Harrison (Houston Contracting)> Modified Form Status to <OUTSTANDING> Modified Date Created to <24/03/2017 12:04:31 PM> Modified UserGenerated to <1> Modified FromCompId to <HCC> Modified FromId to <GH> Recipient <Adrian Hinkley (Engineering Project Services)> added Recipient <Frank Jacobs (Engineering Project Services)> added Recipient <John Smith (Houston Contracting)> added **[Section 00 - CAR]** Modified Comments to <The correct dimensions are attached below, please make changes to previous drawings.> Modified Int_Adr to <Greg Harrison (Houston Contracting)> Modified CompanyName to <Houston Contracting> Modified Position to <Project Administrator> **[Section 01 - Lot Details]** Modified FromChainage to <0> Modified ToChainage to <0>
CAR	HCC-CAR-000003	3/24/2017 12:05:55 PM	Form Edited	Greg Harrison	Houston Contracting	**[Section 01 - Lot Details]** Modified LotNo to <LOT-CIV-0001 - Clearing Section>
CAR	HCC-CAR-000003	3/24/2017 12:05:56 PM	Form Issued	Greg Harrison	Houston Contracting	Recipient <Frank Jacobs (Engineering Project Services)> Notified Recipient <Adrian Hinkley (Engineering Project Services)> Notified Recipient <John Smith (Houston Contracting)> Notified
CAR	HCC-CAR-000003	4/7/2017 9:13:47 AM	Form Viewed	Greg Harrison	Houston Contracting	
CAR	HCC-CAR-000003	4/7/2017 12:45:53 PM	Form Viewed	Greg Harrison	Houston Contracting	
CO	EPS-CO-000001	4/6/2017 9:53:10 AM	Form Created	George Robinson	Engineering Project Services	Modified Form Reference No to <EPS-CO-000001> Modified Subject to <test 2> Modified Form Initiator to <George Robinson (Engineering Project Services)>

8.3 010 - REPORT - REVIEW DETAILS

This report shows the Form's total review days and completion dates and who has reviewed the Form.



Back | 1 of 1 | 100% | Find | Next

Forms Report - Review Details

Forms Testing Project

Filter: (dt_completed between '2010-01-01' and '2017-04-10' and Restricted to 10000 records)

Report No: 40.010
User: Greg Harrison
Run Date: 10-04-17 05:21 PM
Page: 1

						Total days			Completion		
Form Type	Form Ref No.	Step ID	Step Title	Reviewer Name	Reviewer Company	Sheduled	To Date	Left	Sheduled	Actual	Optional/ Either
NCR	HCC-NCR-000001	NCR-000003	Investigation	Mitch Meadows	Houston Contracting	2	0	0	07-03-17	03-03-17	
NCR	HCC-NCR-000001	NCR-000004	Review	Mitch Meadows	Houston Contracting	2	0	0	07-03-17	03-03-17	

Total Items: 2

8.4 015 - REPORT - COMMENTS

This report shows the forms with comments against them and who has raised those comments.

Back | 1 of 1 | 100% | Find | Next

Forms Report - Comments

Forms Testing Project

Filter: (dt_comment between '2010-01-01' and '2017-04-10' and Restricted to 10000 records)

Report No: 40.015
User: Greg Harrison
Run Date: 10-04-17 05:20 PM
Page: 1

Form Type	Form Ref No.	Item No.	Date	Raised By	Company	Comments
NCR	HCC-NCR-000002	01	4/10/2017 3:12:40 PM	Greg Harrison	Houston Contracting	Please also advise on document TR-001
RFI	HCC-RFI-000002	01	3/2/2017 1:23:20 PM	Greg Harrison	Houston Contracting	Please note that this is a structural issue
RFI	HCC-RFI-000003	01	3/30/2017 4:13:22 PM	Greg Harrison	Houston Contracting	George please see comment
RFI	HCC-RFI-000005	01	4/7/2017 1:18:15 PM	Greg Harrison	Houston Contracting	John, I don't think that the drawing has been provided, can you send this through

Total Items: 4

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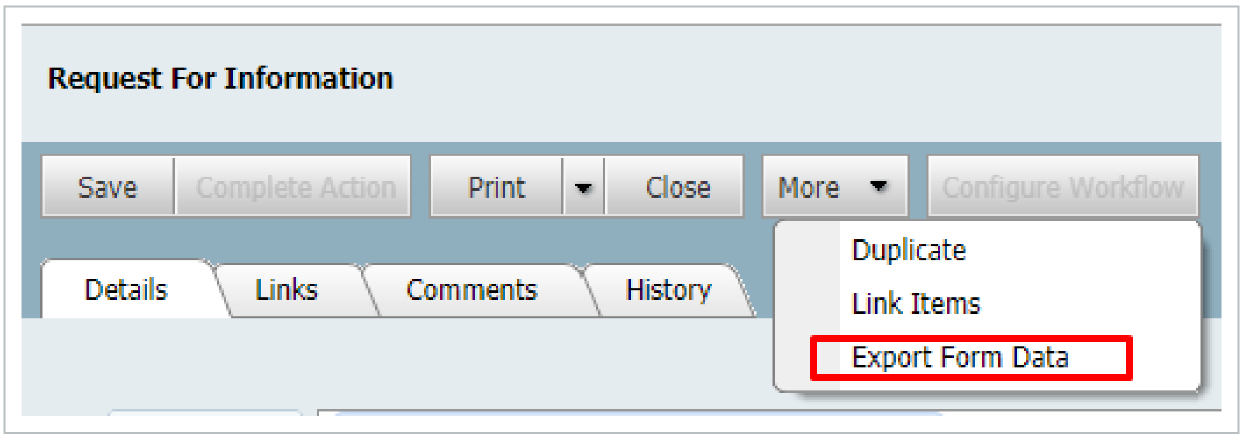
CHAPTER 9 – FORM EXPORTS

It is possible to import forms individually and in bulk (useful for project handover).

9.1 EXPORT INDIVIDUAL FORMS

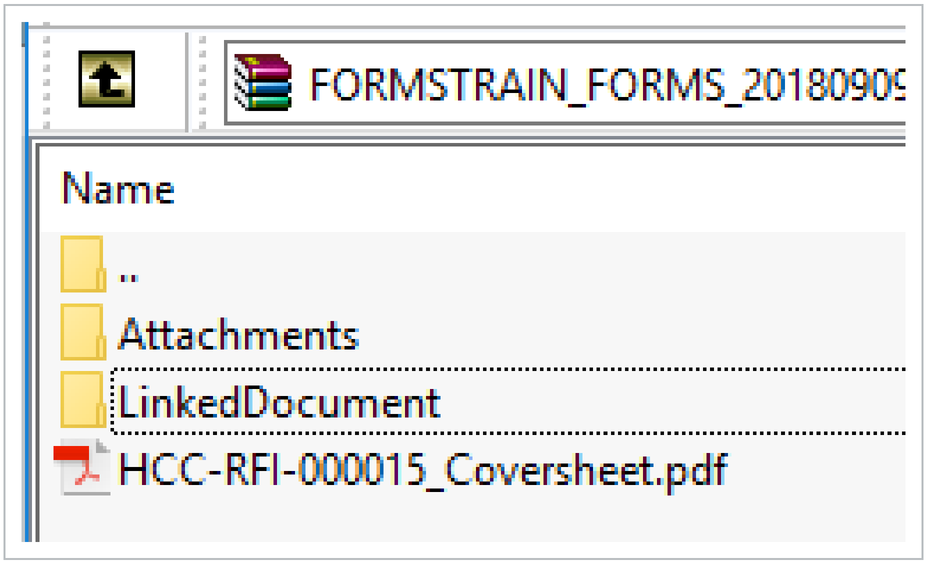
To Export individual forms, follow the steps below

1. Open an Individual form and click on the **More** button and select **Export Form Data**.



2. Save the resulting ZIP file.

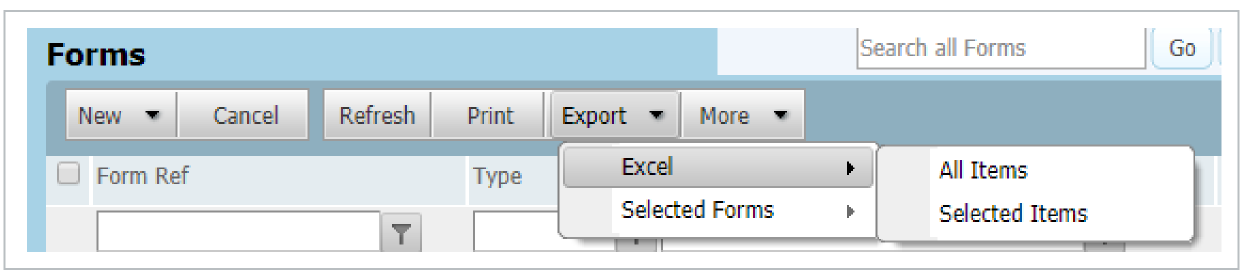
3. The ZIP file is broken down by the Form Number > Attachments and Links.



9.2 EXPORT FORMS IN BULK

Forms can be exported in Bulk by selecting the Export button after ticking the forms required for export. The following can be exported:

1. Excel Exports - If the Form Type drop down list is set as All Items then the complete Forms register is exported with all visible columns on screen.
   If a specific Form type has been selected in the Form Selector dropdown on the register, then then Export process exports the Section Data into Excel. Note that only one Form Type at a time can be exported in this manner.



2. Selected Forms – If Specific Forms are to be exported in bulk with their tick only the Forms required and then Export the data to PDF or HTML. PDF Complete exports a zip file containing a folder per Form Exported with all contents as per 9.1