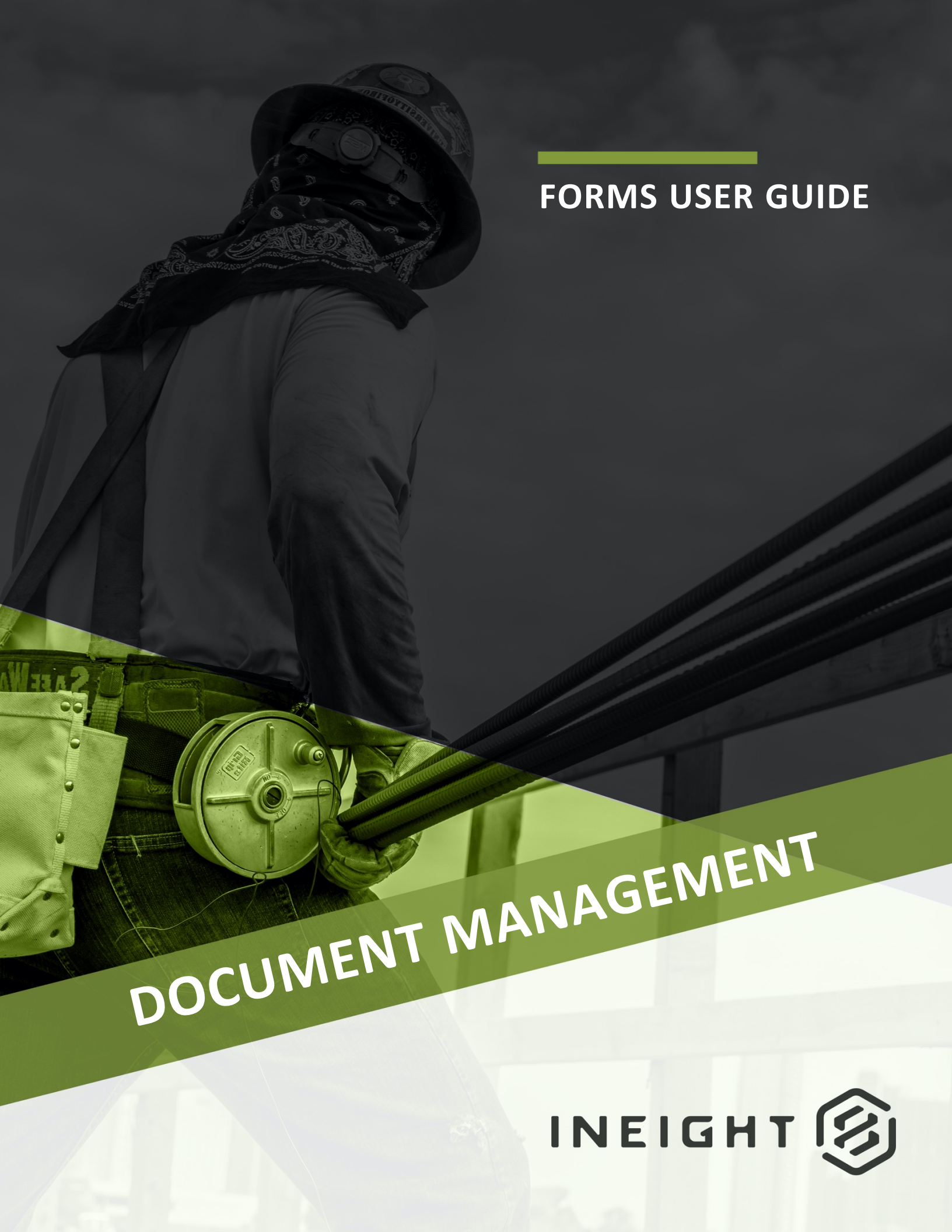

FORMS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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CONTENTS

CHAPTER 1 – USING THE FORMS MODULE 5
1.1 Understanding Forms 5
1.2 Understanding Forms Components 9

CHAPTER 2 – INTERACTING WITH A FORM 11
2.1 Non-Workflow Form 11
2.1 Step by Step 1 – Initiate a new non-workflow form 11
2.1 Step by Step 2 – Participate in a non-workflow form 13
2.2 Workflow Form 16
2.2 Step by Step 1 – Initiate a new workflow form 16
2.2 Step by Step 2 – Participate in a workflow form 18
2.3 Remove a workflow from a form 20
2.4 Creating New Forms in Bulk 20
2.4.1 To create new forms in bulk: 20
2.5 Using Forms tabs 21
2.5.1 Links tab 22
2.5.2 Comments tab 23
2.5.3 History tab 23
2.6 Create an issue in InEight Change 24

CHAPTER 3 – MANAGING FORMS 27
3.1 Exporting forms 27
3.1 Step by Step 1 – Export a form 27
3.1 Step by Step 2 – Export form details in bulk to Excel 28
3.2 Duplicating Forms 29
3.2.1 To duplicate forms: 29
3.3 Cancelling Forms 31
3.3.1 To cancel a form: 32

3.3.2 Form Cancellation – Permissions ... 33
3.4 Changing Form Status in Bulk ... 34
3.4.1 To change form status in bulk: ... 34
3.5 Transferring Ownership of Forms ... 35
3.5.1 To transfer form ownership: ... 35
3.6 Providing Bulk Form Access ... 36
3.6 Step by Step 1 – Grant form access in bulk ... 37
3.7 Removing and replacing recipients in bulk ... 38
3.7.1 To remove recipients in bulk: ... 39
3.7.2 To replace recipients in bulk: ... 40
3.8 Process Form Attachments As Controlled documents ... 41

CHAPTER 4 – CONFIGURING FORMS ... 43
4.1 Editing Forms Section Reviewers (workflow forms only) ... 43
4.1.1 To edit security settings for Forms sections: ... 43
4.2 Preparing a Workflow Form ... 44
4.2.1 Workflow forms: ... 44
4.2.2 Understanding status codes: ... 45
4.2.3 Understanding workflow steps: ... 45
4.3 Status Values for Form Types ... 46
4.3.1 To allocate status values for form types: ... 46
4.4 Configuring a Workflow Form Type ... 48
4.4 Step by Step 1 – Set up a workflow form ... 48
4.5 Managing Reviewers and Distribution Groups ... 53
4.5.1 To manage reviewers and distribution groups: ... 53

CHAPTER 5 – APPLYING FORMS SECURITY SETTINGS ... 57
5.1 Understanding Forms Access Rules ... 57
5.1.1 Access to the Forms module is controlled at three levels: ... 57
5.1.2 Access rules per form are as follows: ... 57
5.2 Accessing User Security Settings ... 57
5.2.1 To access user security settings for forms: ... 58
5.3 Editing User Access Settings ... 58
5.3.1 To edit user access for forms: ... 59
5.3.2 The levels of user access are as follows: ... 60

CHAPTER 1 – USING THE FORMS MODULE

For information on using the Forms Module, see the links below.

1.1 UNDERSTANDING 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.

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.
6. 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.

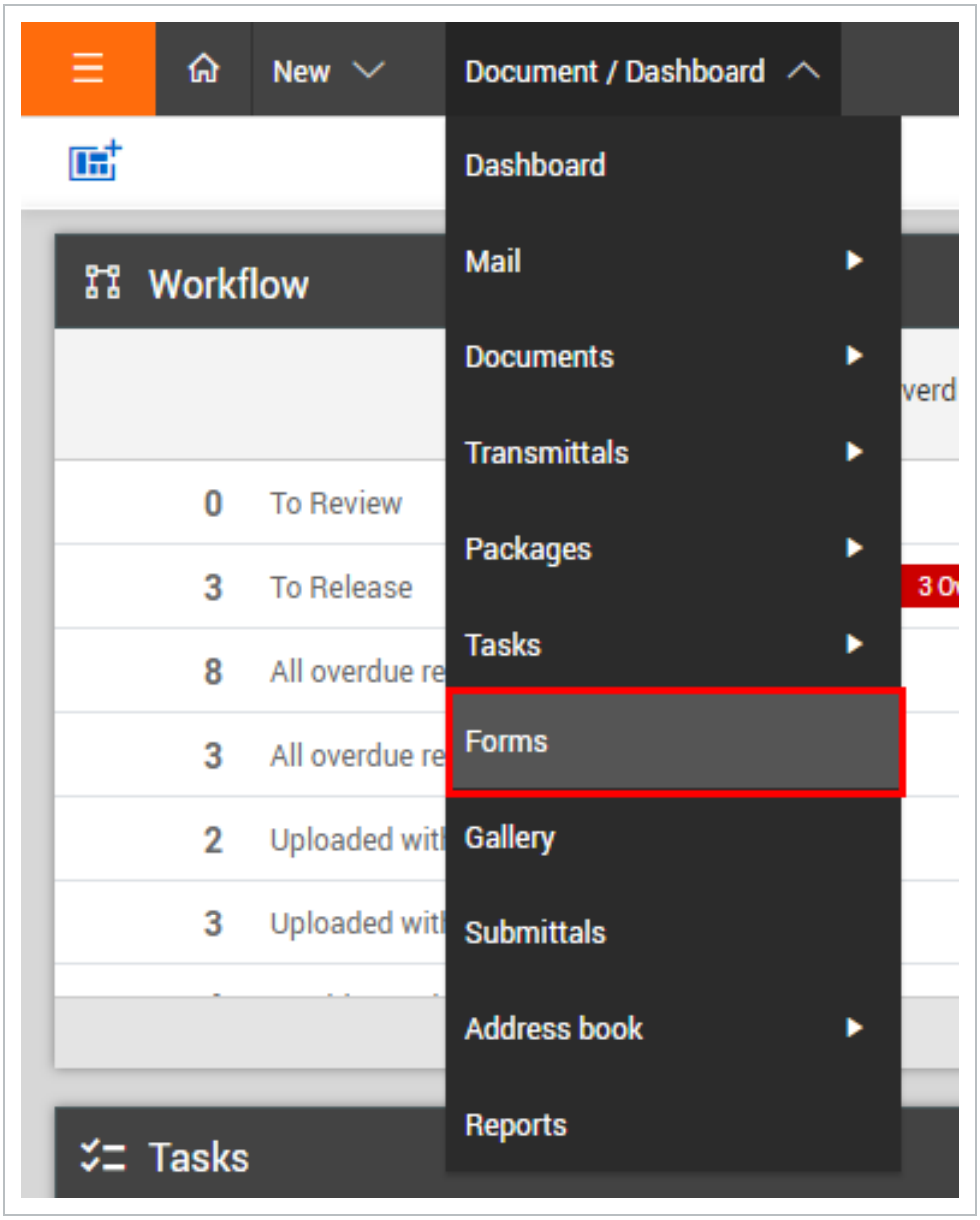
Form participant access can be set at a Form or Section level or defined by a workflow. Default distribution groups and workflows can also be defined in advance or as required.

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

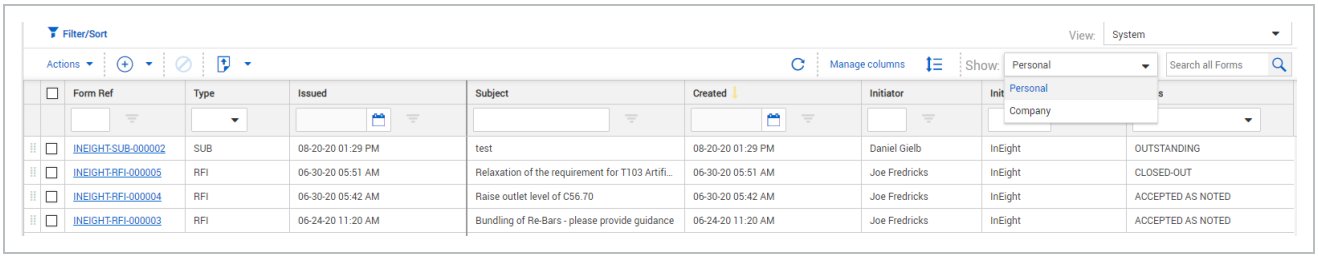
Form section	Area of the form
Form steps	Logical steps connected via a workflow.
Next action	Possible outcomes a user can select after completing their first step (configured via the workflow). This outcome can also affect the form status.
Form status values	Values that are assigned to one or more steps to further assist form management.
Distribution	The distribution list for a form is separated by people receiving the form **For Action** and those receiving it **For Info**. **For Action** recipients can add information to the

Form section	Area of the form
	form (although workflow-based form access is restricted by workflow steps).
Complete action	Publishing the form or indicating you have completed your section, meaning the form can move to the next step.
Workflow driven forms	A workflow driven form is broken into steps related to one or more sections to be completed by recipient(s).
Non-workflow driven forms	A non-workflow form consists of two elements: the initiator section and the recipient sections.

To Access the Forms register, select Forms on the dropdown on the Dashboard



The default view will be for your Personal forms. If you have access to your Company forms you can toggle your Company view.

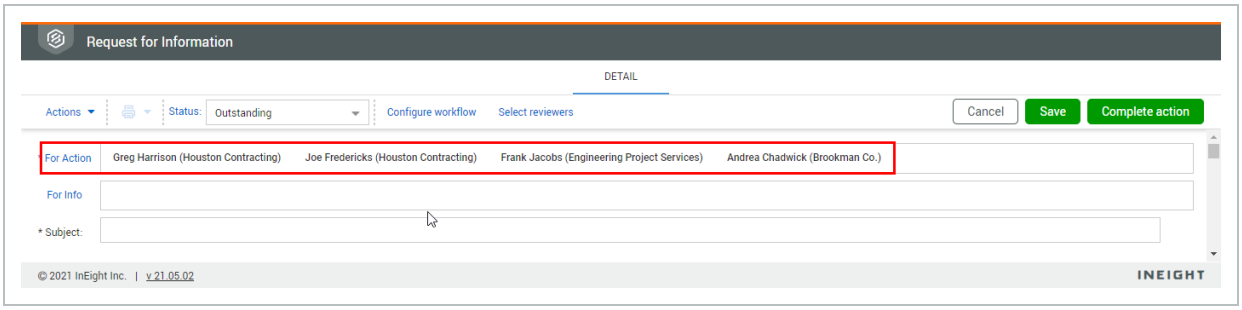


SEE ALSO

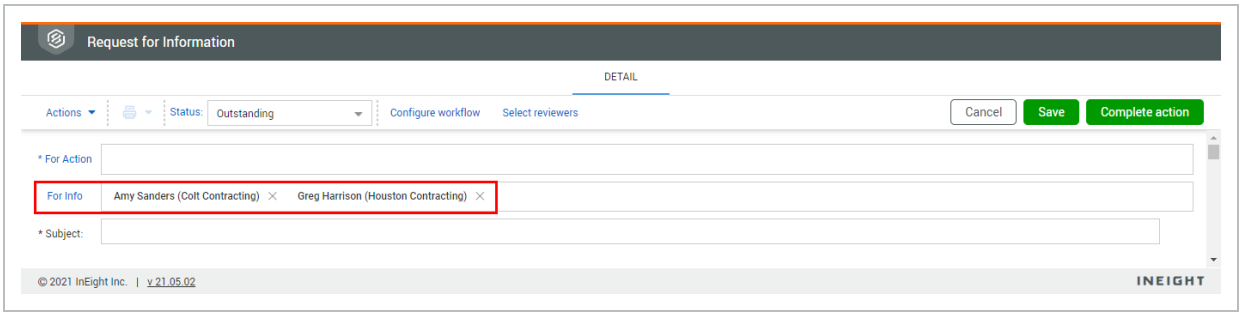
1.2 UNDERSTANDING FORMS COMPONENTS

When creating a new form, there are multiple components to be completed.

1. **Distribution Lists**
    a. **For Action Participants:** Participants listed in the For Action field are required to update one or more sections of the form (other than the initiator section). The initiator can also be added as a For Action recipient.

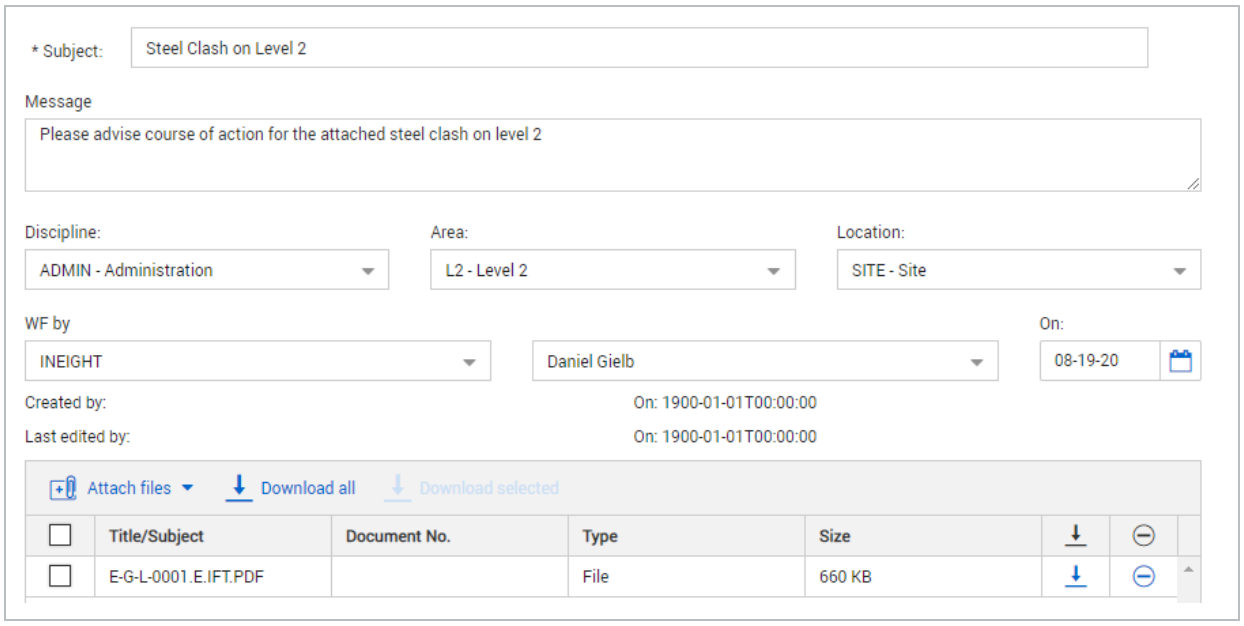


    b. **For Info Participants:** Participants listed in the For Info field are not able to edit the form, but can add comments and view the history details of the form.



2. **Initiator section:** The initiator section of the form contains a distribution list, subject, message and standard fields (such as discipline, area and location). The recipient will also be able to see who created the form, who last edited it and the corresponding dates. Note: Only the Company

administrator or the creator of the form can edit this section.



CHAPTER 2 – INTERACTING WITH A FORM

For information on Interacting With A Form, see the links below.

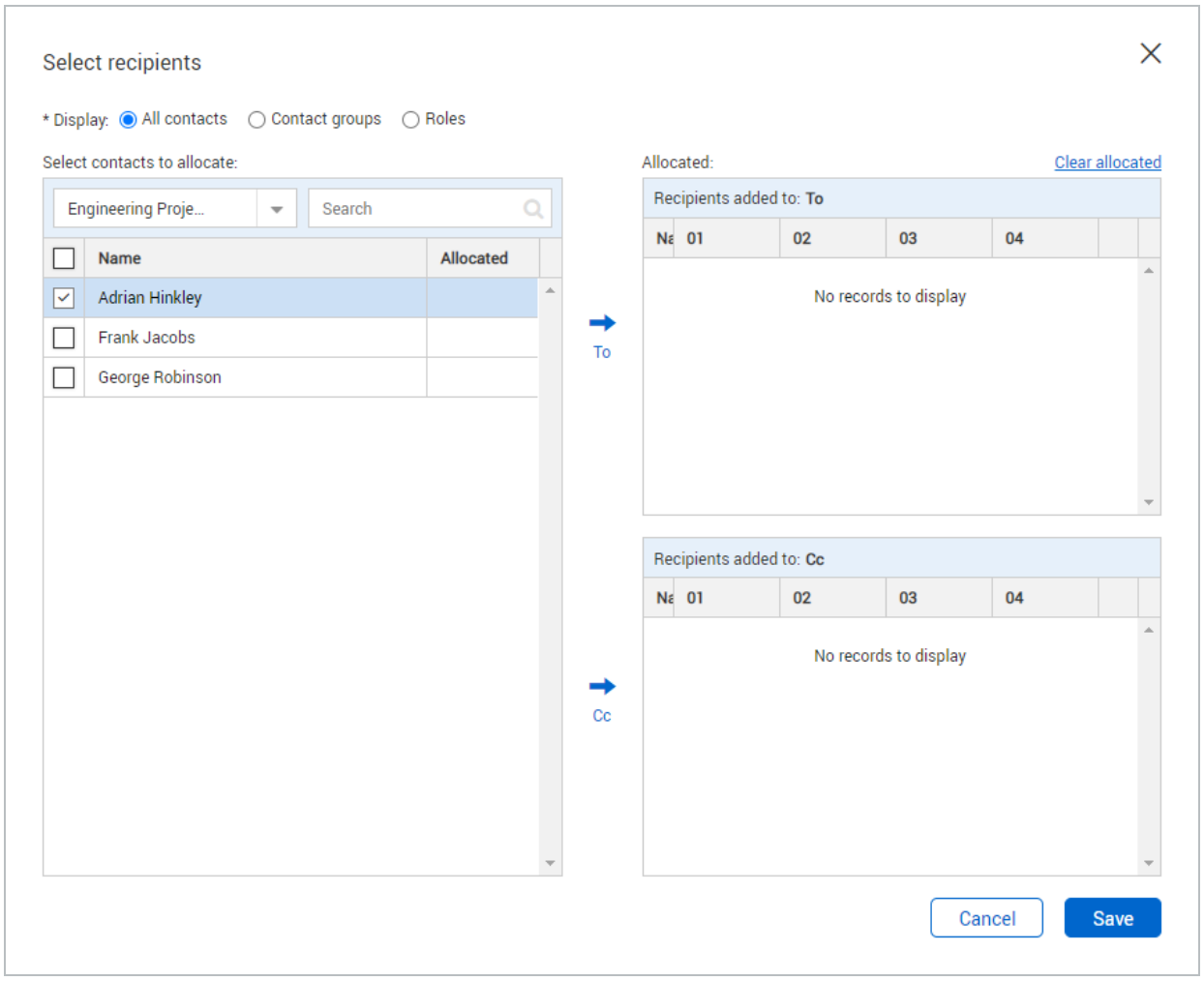
2.1 NON-WORKFLOW FORM

2.1 Step by Step 1 — Initiate a new non-workflow form

Summary: Initiate a non-workflow form when the form does not need the workflow driven process.

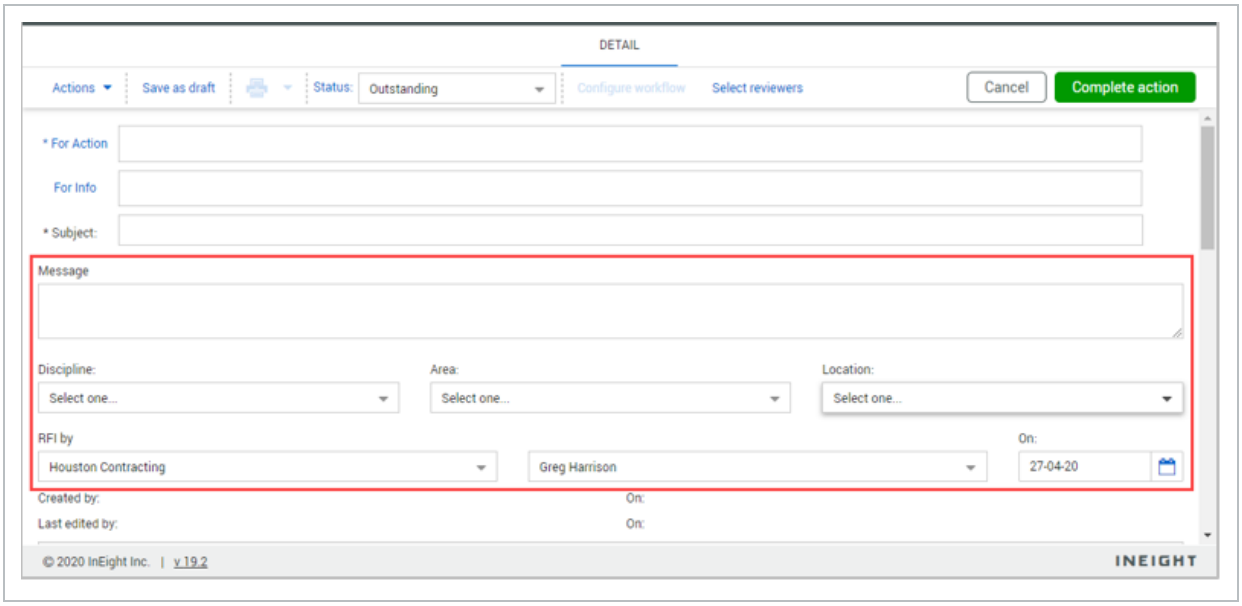
1. Click the **Add** icon, and then select a non-workflow form type.

2. Type in the names in the For Action and For Info field, or click **For Action,** and filter by company and Contacts. In this dialog box, you can change the level of access people, groups, and roles have to different sections of the form (if applicable)

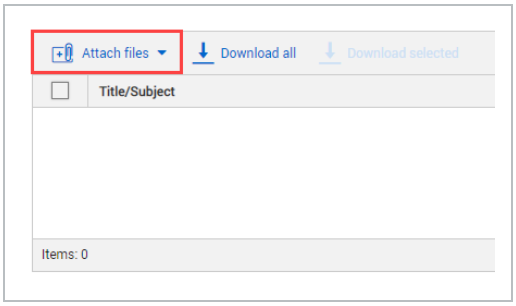


NOTE External contacts are recognized in roles. If a role contains an external contact, the contact does not have to be added as a user.

3. Enter in the form details.



4. Click **Attach files** to upload files.



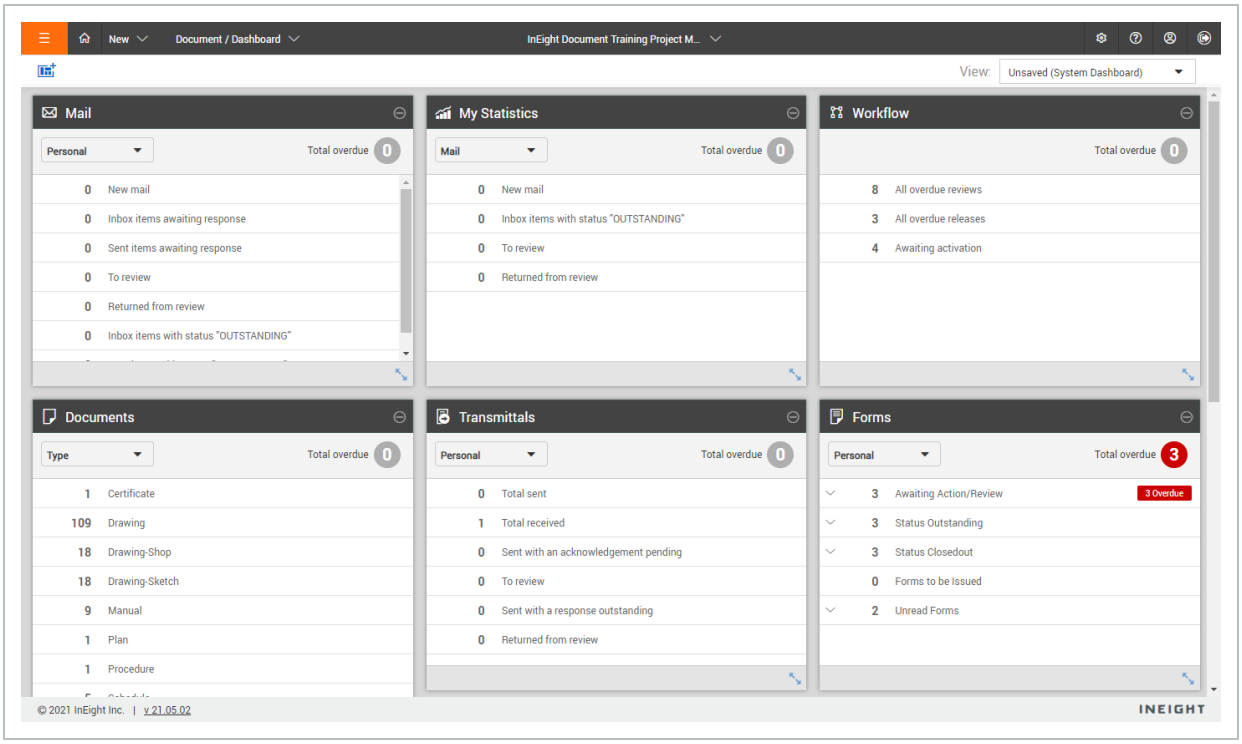
5. Click **Complete action**. This initiates a notification to the person / people in the For Action and For Info fields. You can save the form as a draft until you are ready to complete the form and click **Complete action**.

2.1 Step by Step 2 — Participate in a non-workflow form

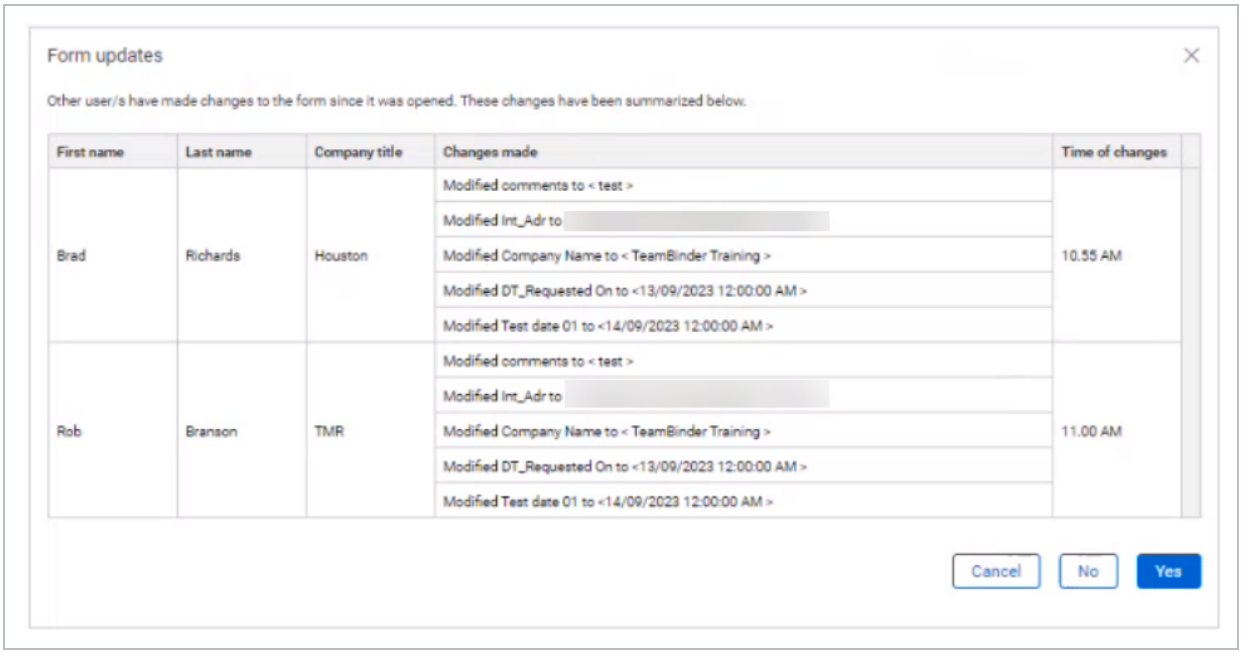
Summary: When you receive a notification that a non-workflow form needs action, you can access the form and complete the form sections.

Considerations: Multiple users can receive a notification for the same form. All form participants will receive a notification advising them of the forms they need to action.

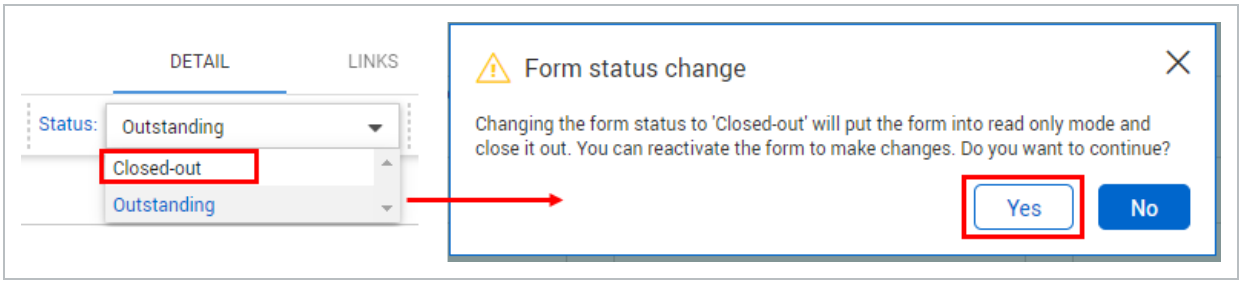
1. From the Forms Tile at the Dashboard or the Forms Register, click on a form to open it.



3. The relevant sections of the form are enabled for completion. Enter the form information as required.
4. Save the form. When you save the form when other users are working simultaneously in the same form, Document shows a message warning that other users have made changes. When a form is left open and other users have made changes prior to anyone saving it, a list of changes is shown. You can then choose to overwrite the changes with your own or accept the updates other users have made to the form.

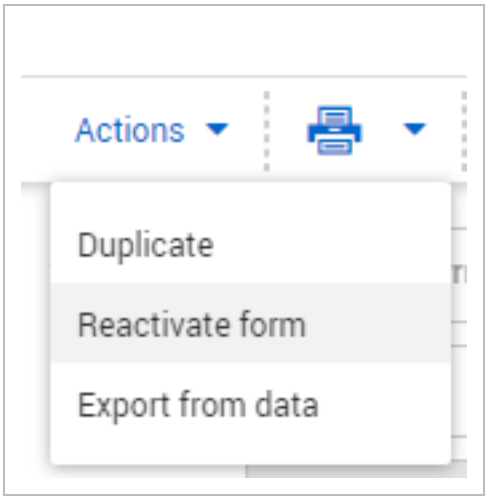


5. After the form is completed, change the form status to *Closed Out*, select *Yes* on the Form status change dialog box, and then click **Complete Action**.



5. Once a form is closed out it cannot be edited unless the Initiator or a user with Full Access to Forms from the same Company reactivates the form within the Forms Register. Forms with a

status of **Outstanding** can still be edited.

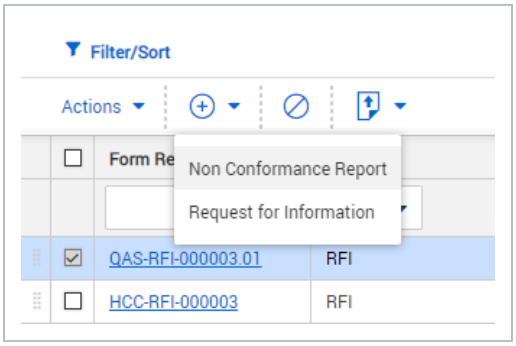


2.2 WORKFLOW FORM

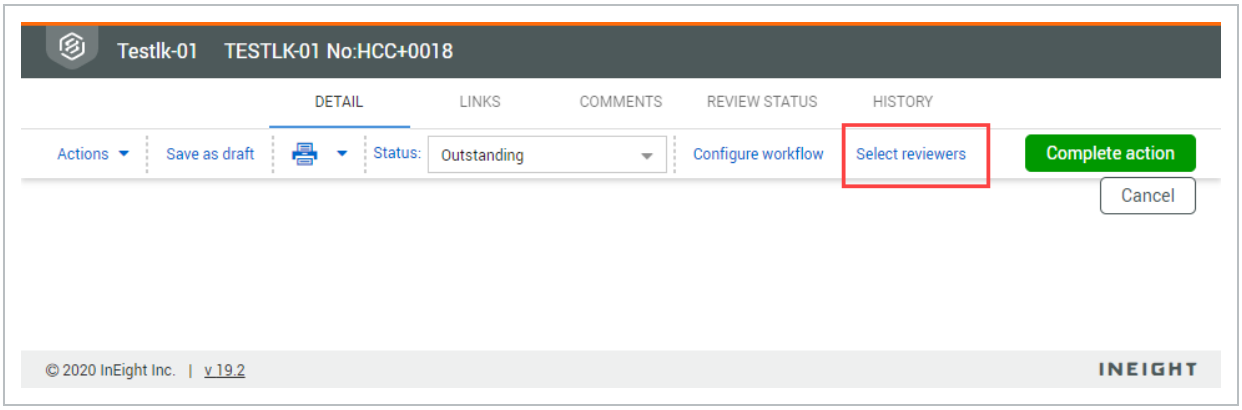
2.2 Step by Step 1 — Initiate a new workflow form

Summary: Initiate a workflow form when there are multiple form sections to be completed as steps.

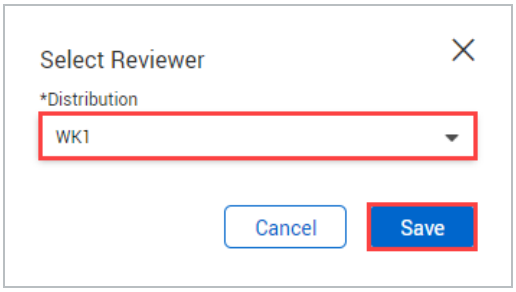
1. Click the **Add** icon, and then select the form type.



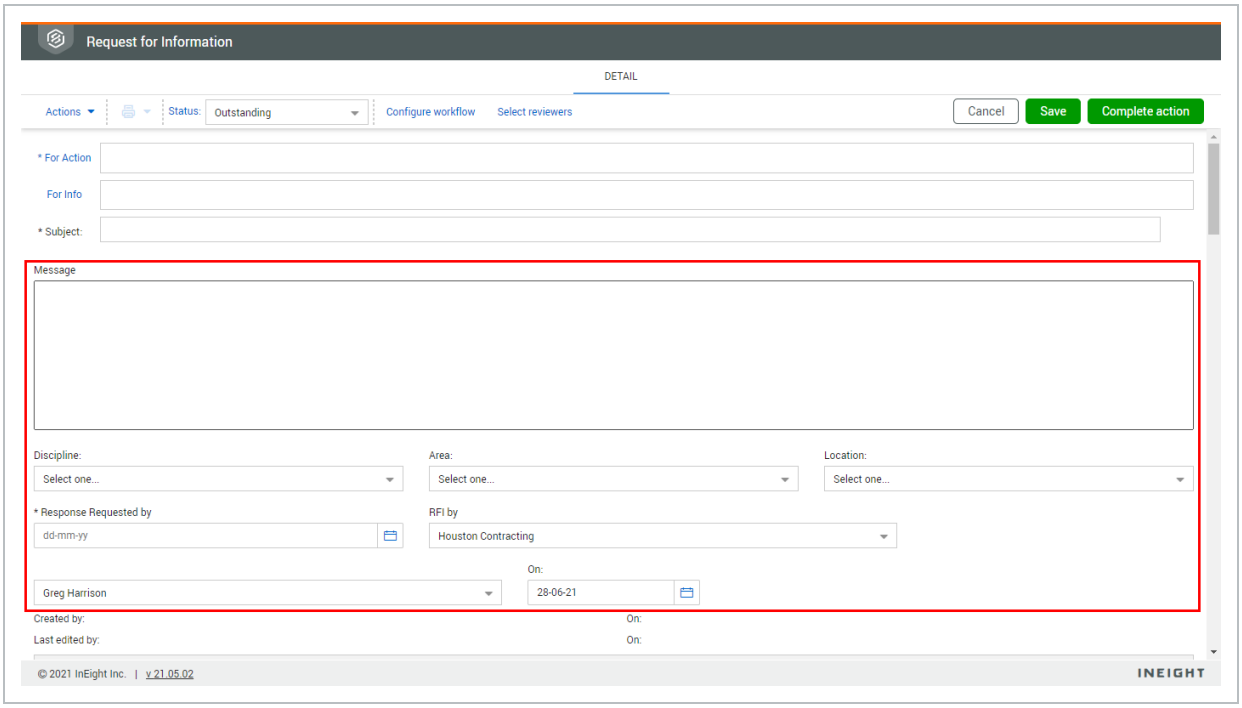
2. Click **Select reviewers**.



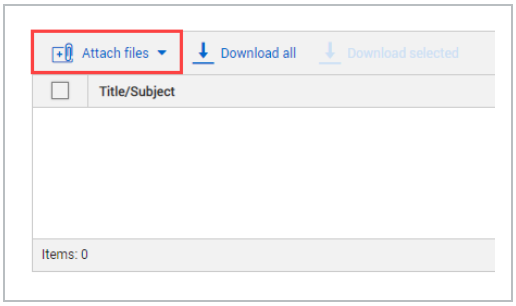
3. Select the workflow distribution group from the drop-down menu, and then click **Save**.



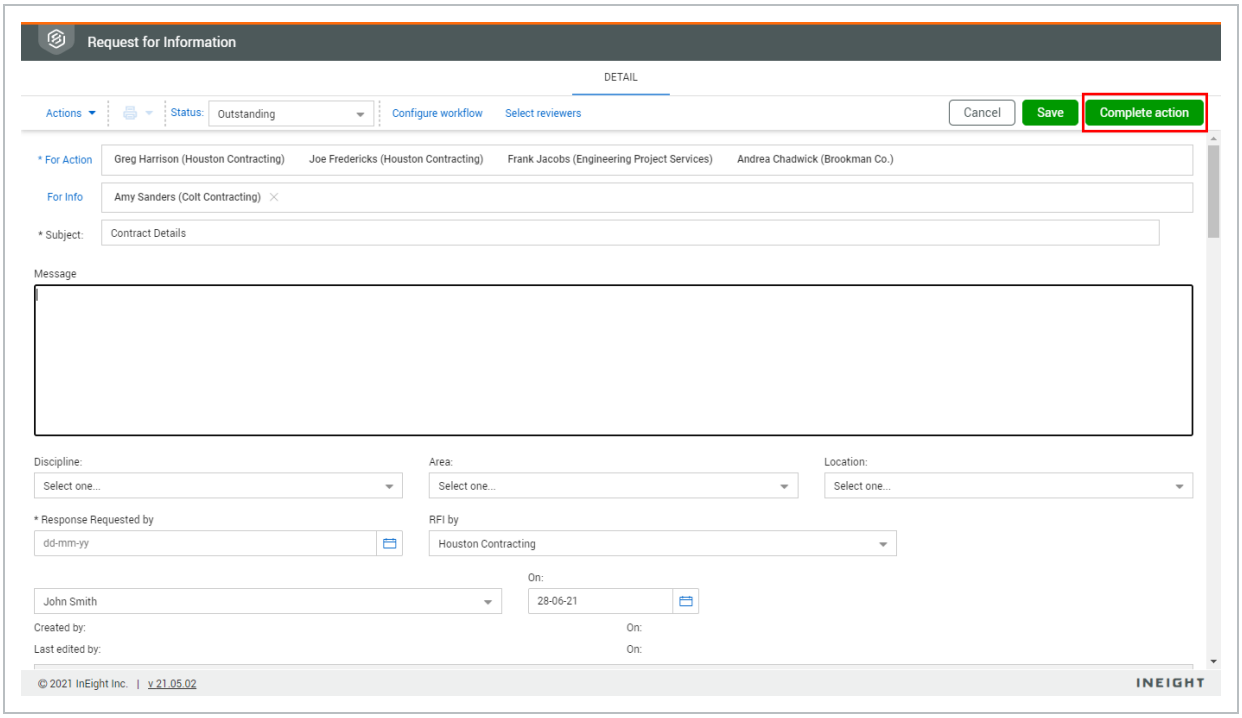
4. Enter in the form details.



5. Click **Attach files** to upload files.



6. Click **Complete action**. Document sends a notification to the people in the next step of the workflow. You can save the form as a draft until you are ready to complete the form and click **Complete action**..

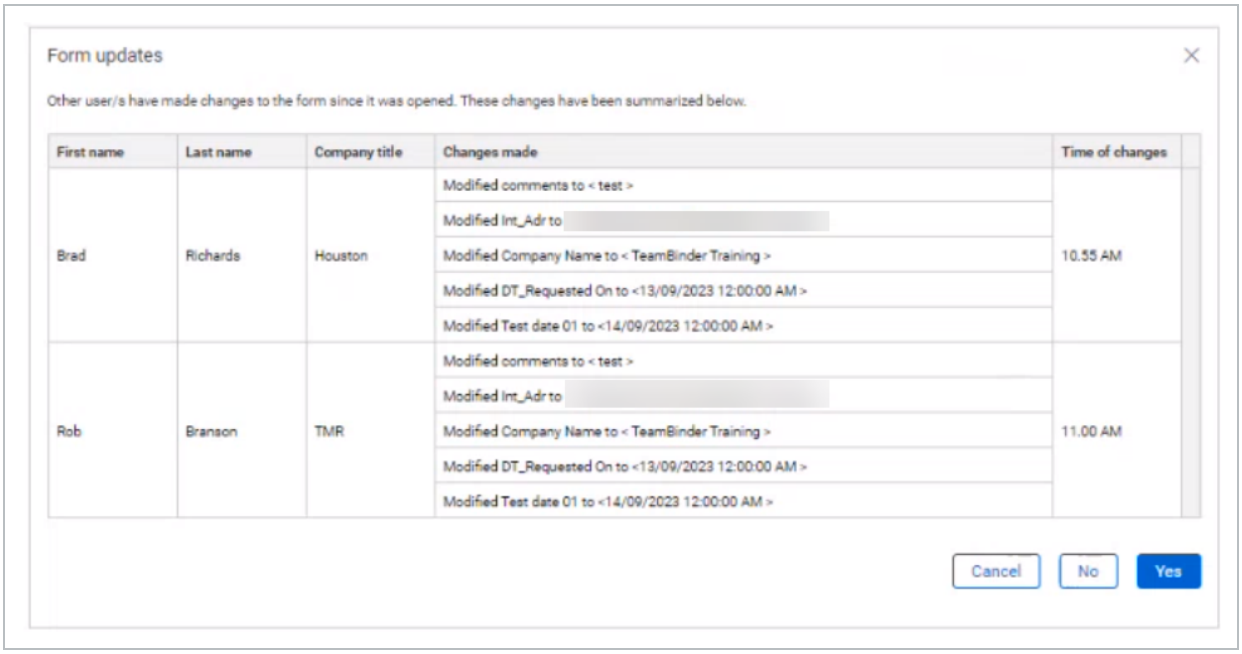


2.2 Step by Step 2 — Participate in a workflow form

Summary: When you receive a notification that a workflow form needs action, you can access the form and complete the form sections.

Considerations: Multiple users can receive a notification for the same form. All form participants will receive a notification advising them of the forms they need to action.

1. From the Forms tile on the Dashboard or the Forms register, click a form name to open it.
3. The relevant sections of the form are enabled. Complete the form as required.
4. Save the form. When you save the form when other users are working simultaneously in the same form, Document shows a message warning that other users have made changes. When a form is left open and other users have made changes prior to anyone saving it, a list of changes is shown. You can then choose to overwrite the changes with your own or accept the updates other users have made to the form.

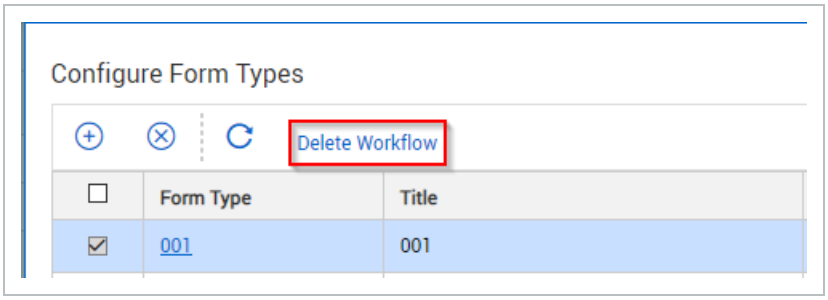


5. After you have completed your section, click **Complete Action**.
6. If form steps have been configured, you will be prompted to nominate the next step of progressing forward or reverting to a previous step.
7. After the final step for a form has been completed and the status updated to Closed Out, the form becomes locked and can no longer be edited. The Iinitiator or a user with full access to forms from the same company can reactivate the form within the Forms register. Forms with a status of *Outstanding* can still be edited.

2.3 REMOVE A WORKFLOW FROM A FORM

Sometimes a form has a workflow that is not necessary. You can remove the workflow from the Configure Form Types

1. From the Forms register, expand the **Actions** menu.
2. Select **Admin**, and then select **Configure form types**. The Configure Form Types dialog box opens.
3. Select one or more forms that have a workflow, and then click **Delete Workflow**.



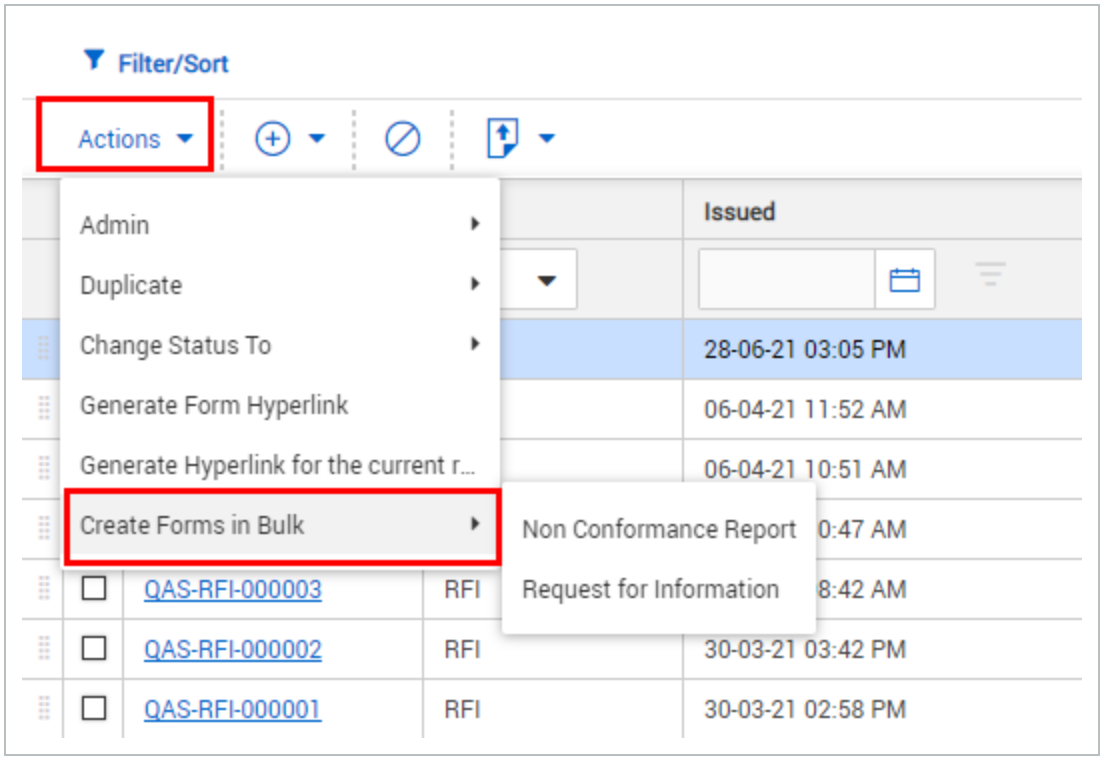
The workflow is deleted from the selected files.

NOTE Workflows can only be removed from a form type for future forms that are created. Any in-progress forms must complete the existing workflow.

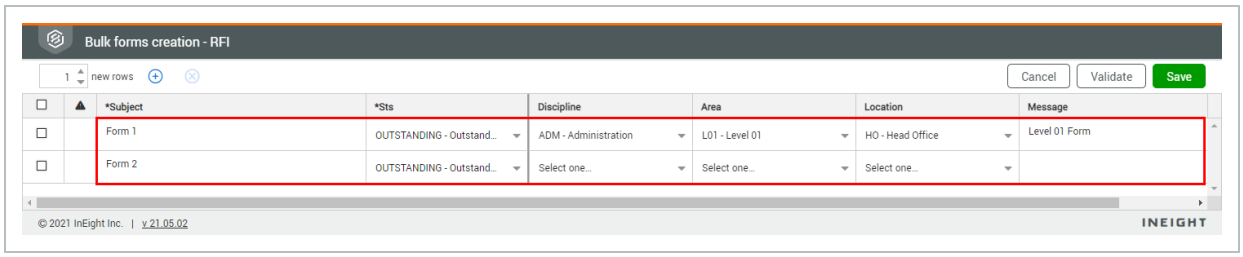
2.4 CREATING NEW FORMS IN BULK

2.4.1 To create new forms in bulk:

1. Click **Actions** and select **Create Forms in bulk**.



2. Enter in the details of each form.



3. Click **Save**.

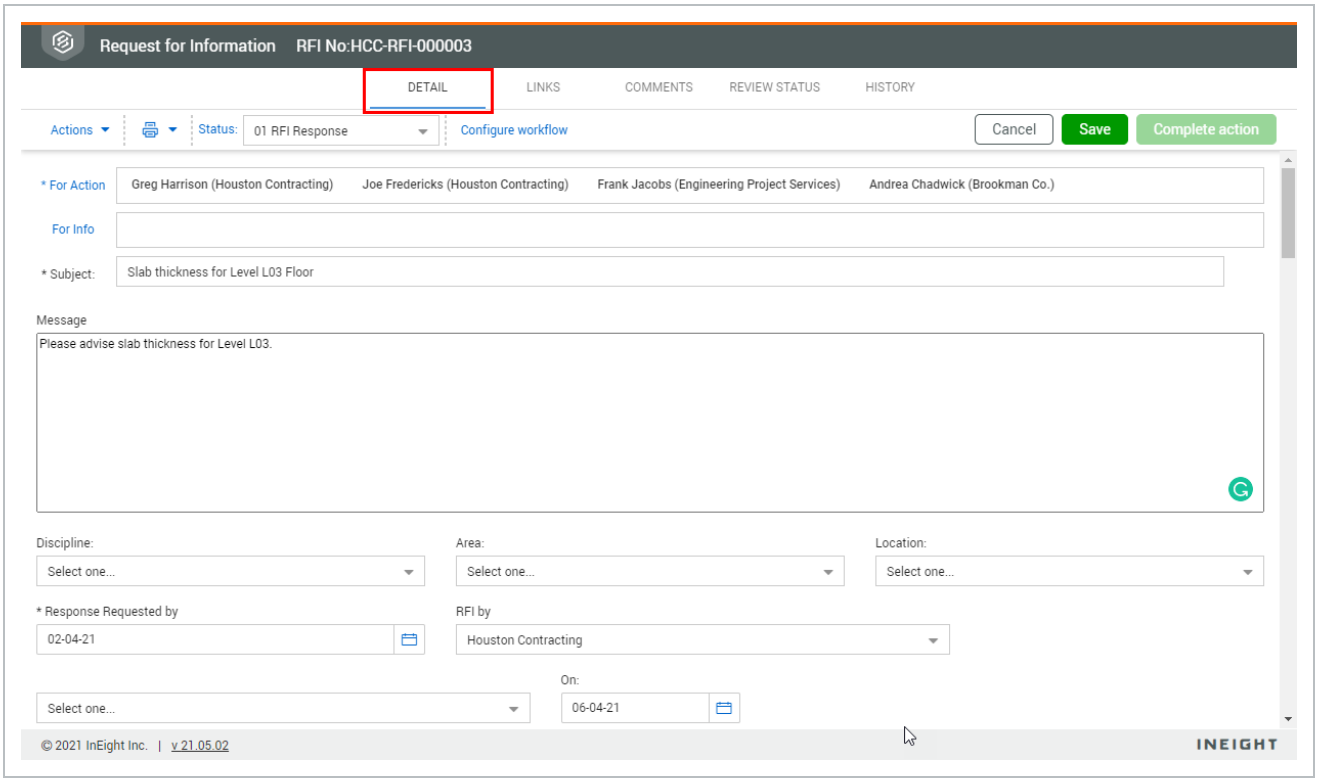
NOTE

- Click the **plus icon** to add rows.
- Click **Validate** to check the form details have been entered correctly.

2.5 USING FORMS TABS

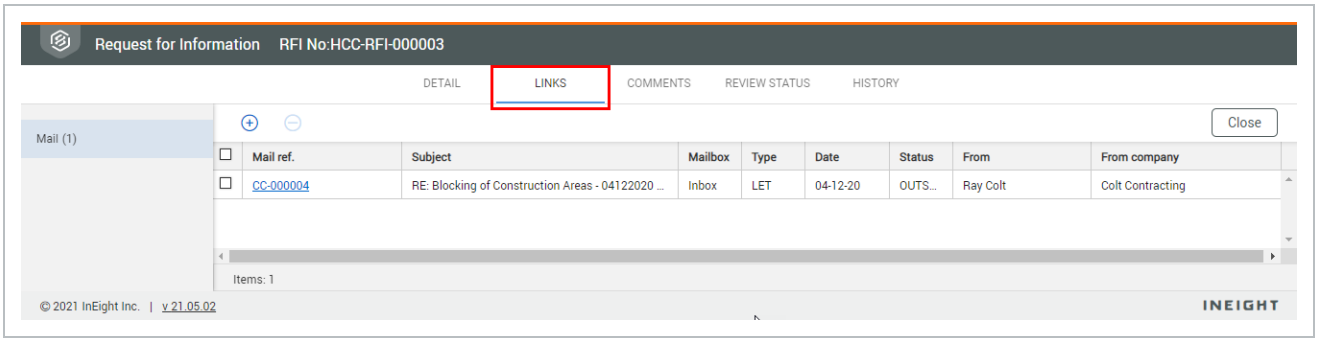
In addition to Form details it is possible to use the tabs at the top of the Form screen to:

- Establish Links between the Form and other InEight Document objects.
- Allow comments on the form.
- View the complete history of all actions and events relating to the form.



2.5.1 Links tab

Link forms to other InEight Document items, such as mail, documents, transmittals, packages and other forms. These links will be shown in the corresponding module (e.g. it is possible to see a form in the mail thread it has been linked to).



Links follow existing access rules. For example, if you do not have access to view a piece of mail in the Mail Register, then you will not see the link to this mail on the form.

2.5.2 Comments tab

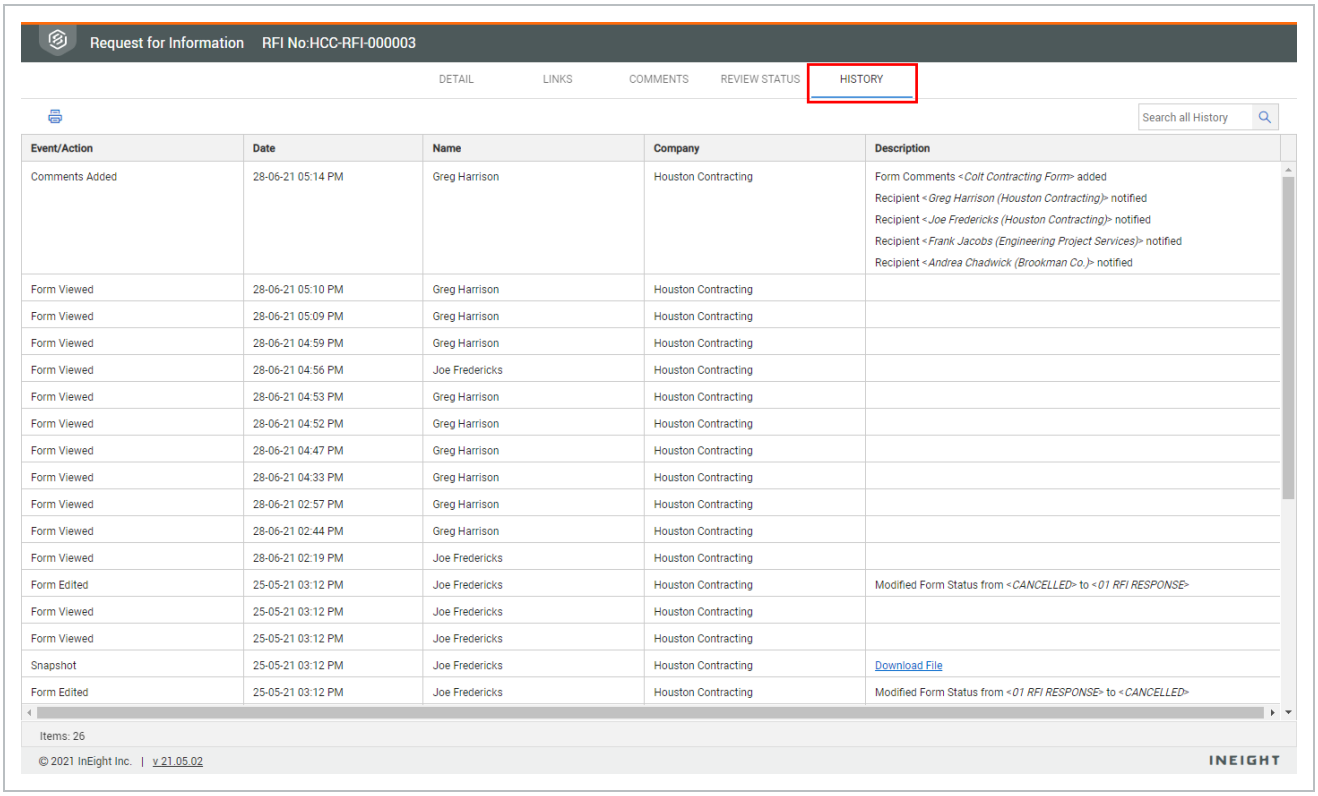
View informal discussions related to the form via the comments tab. Comments can be made by any users with access to the form. When you create a comment, you can select which form participants will be notified.If comments are truncated, you can click the **View more** link in the Comments field to see the full comment.

You can export comments from the Comments tab. Click the **Export** icon to export selected comments to a Microsoft Excel spreadsheet.

2.5.3 History tab

View a complete history of events and actions regarding the form. Every action will be recorded in the history, including:

- Attachment downloads.
- Text edits.
- Distribution changes.
- Status changes.



The form history can be filtered by event/action, date, name, company and description. If a section is not visible, then the user does not have access to view the related history for this section.

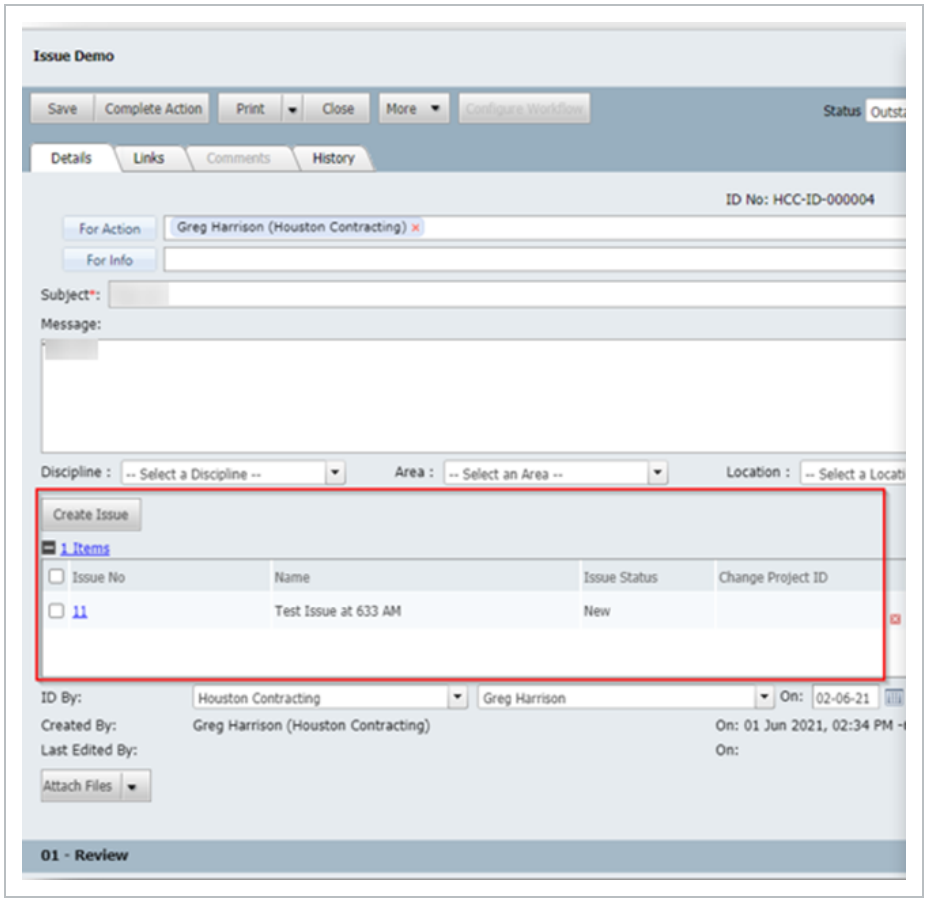
2.6 CREATE AN ISSUE IN INEIGHT CHANGE

You can create an issue in Change directly from a form. To implement this function, you must submit a request to your InEight representative to enable it.

Create an issue in Change to save time when working in forms. You can create the issue with the form without leaving Document.

The functionality is available only for the form type, project, and tenant ID that has been enabled by InEight.

1. Click the Create Issue button on the form.



The Create new issue dialog box opens.

2. Specify the issue name, issue date, and description of the issue.
3. Click **Save**. The issue information is added to the form and the Change Issue log.

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CHAPTER 3 – MANAGING FORMS

For information on Managing Forms, see the links below.

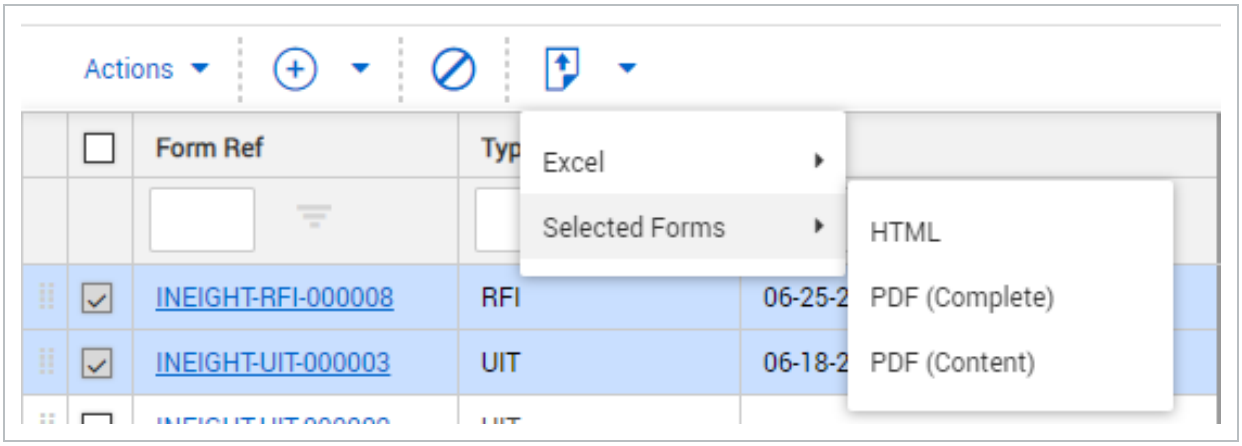
3.1 EXPORTING FORMS

You can export selected forms as HTML or PDFs. You can also export form details as a Microsoft Excel spreadsheet.

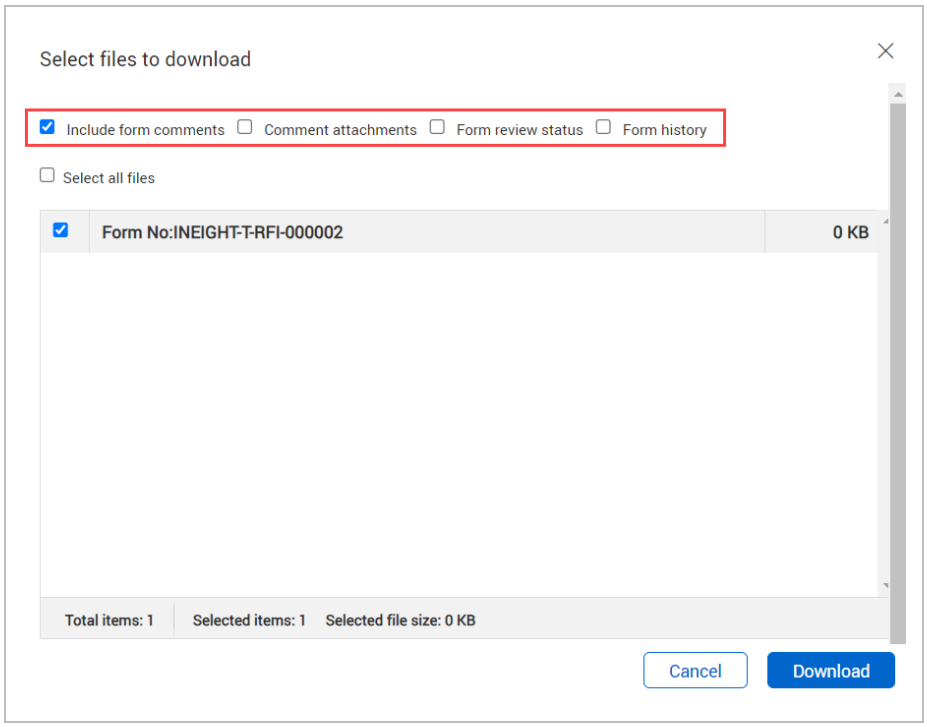
3.1 Step by Step 1 — Export a form

Summary: Export a form when you need the form in HTML or PDF format. You can export multiple forms.

1. Select the form or forms you want to export.
2. Click the **Export** icon.
3. In the **Selected Forms** menu, select either **HTML** or **PDF**. If you selected PDF Complete, the Select files to download dialog box opens.



4. Indicate whether to include form comments, comment attachments, form review status, and the form history.

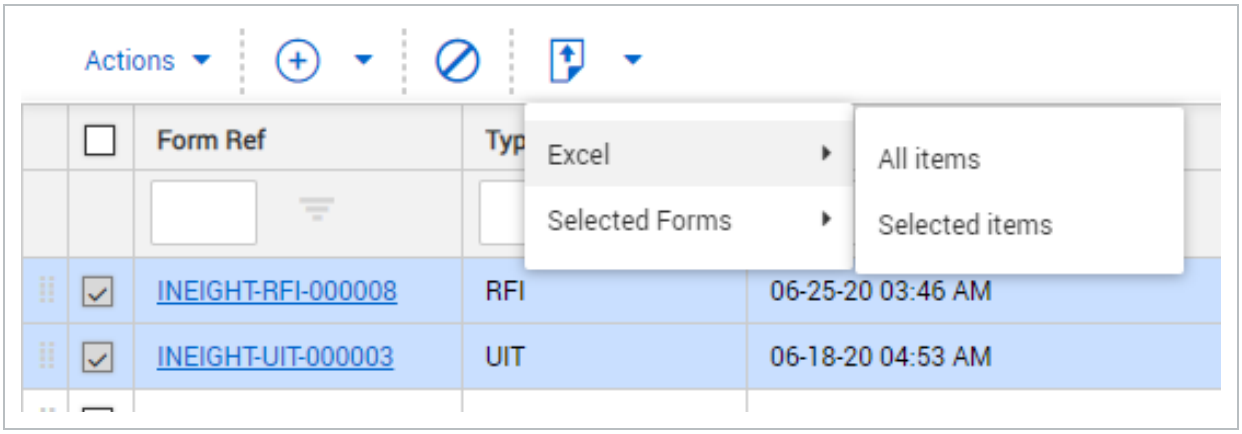


5. Indicate the files to download and whether to include form comments, and then click **Download**.

3.1 Step by Step 2 — Export form details in bulk to Excel

Summary: Export form details to an Excel spreadsheet so you can quickly see the details of the selected forms outside of the Document environment.

1. Select the forms.
2. Click the **Export** icon.
3. In the Excel menu, select **Selected Items**.

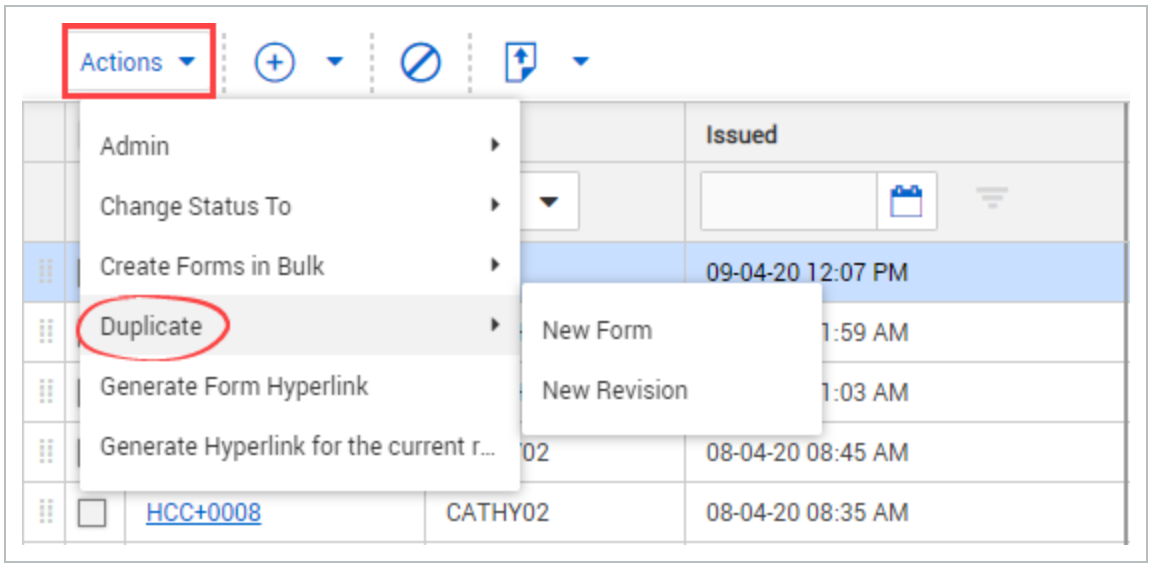


NOTE Export the entire Forms Register by clicking the **Export** icon and then selecting **All items**. If a specific form type has been selected in the Type drop-down list on the register, the Export process exports the section data. Only one form type at a time can be exported in this manner.

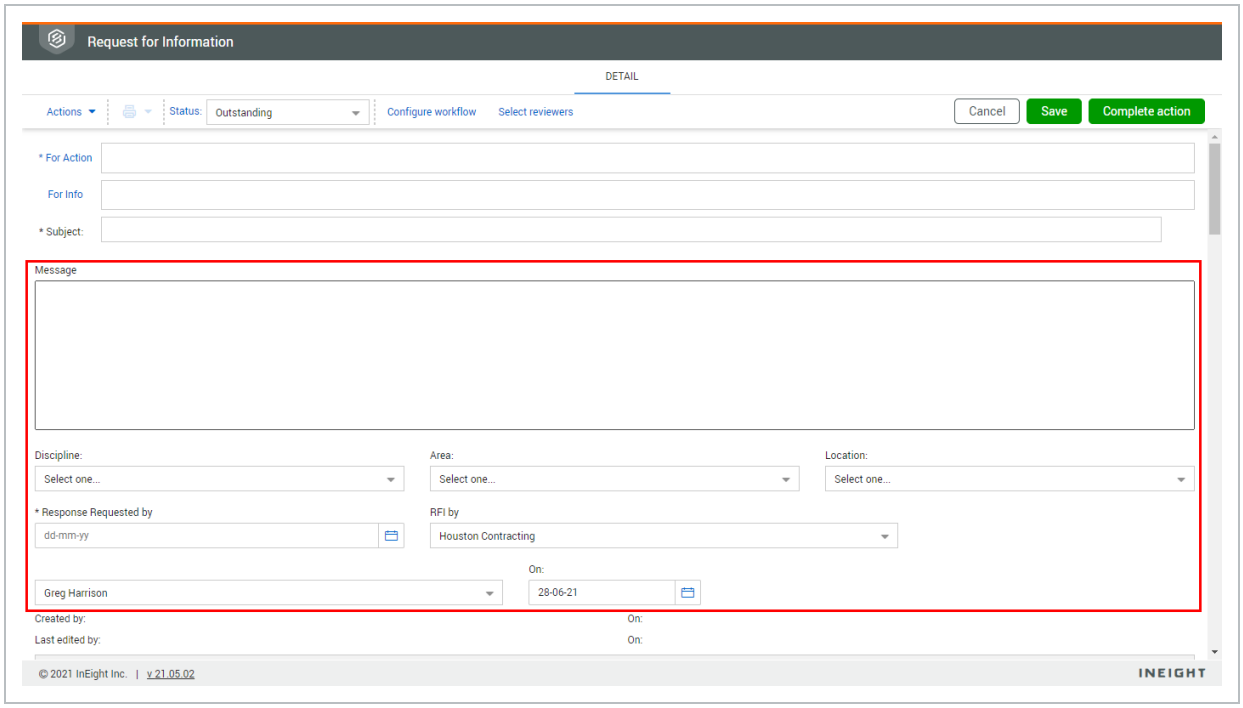
3.2 DUPLICATING FORMS

3.2.1 To duplicate forms:

1. Click **Actions** and select **Duplicate**.
2. Select either:
    a. **New Form**.
    b. **New Revision**.



3. Enter in the form details.



4. Click **Complete Action**.

NOTE

- If **New Form** is selected, a new form with the same type is duplicated with the header information copied over. The number of the new form will be the next sequential number for the form combination (e.g. if the last form RFI form was QAS-RFI-0004, then this form will be QAS-RFI-0005).
- If **New Revision** is selected, a new form with the same type is duplicated with the header information copied over. However, the number of the new form will parent the original form combination (e.g. if the last form RFI was QAS-RFI-0004, then this form will be QAS-RFI-0004.01). This is useful for forms where resubmission of the same content is required because the first form was rejected.

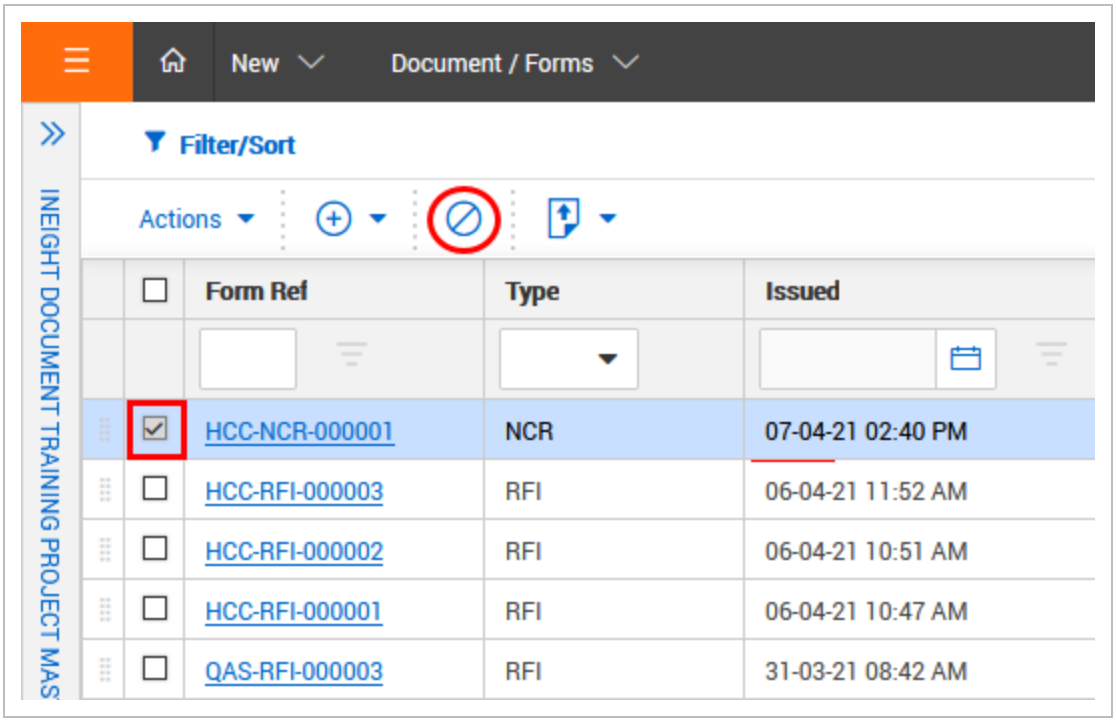
3.3 CANCELLING FORMS

Before you can cancel a form, you need:

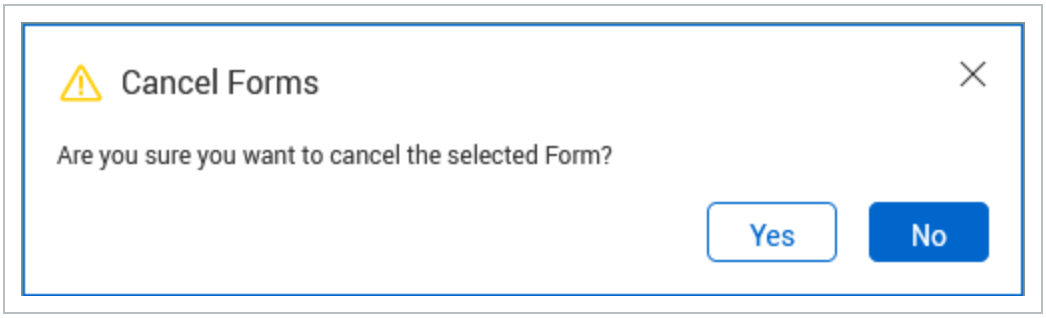
- Full access to the Forms module.
- Send access to the related form type.
- The form must have been initiated by your company.

3.3.1 To cancel a form:

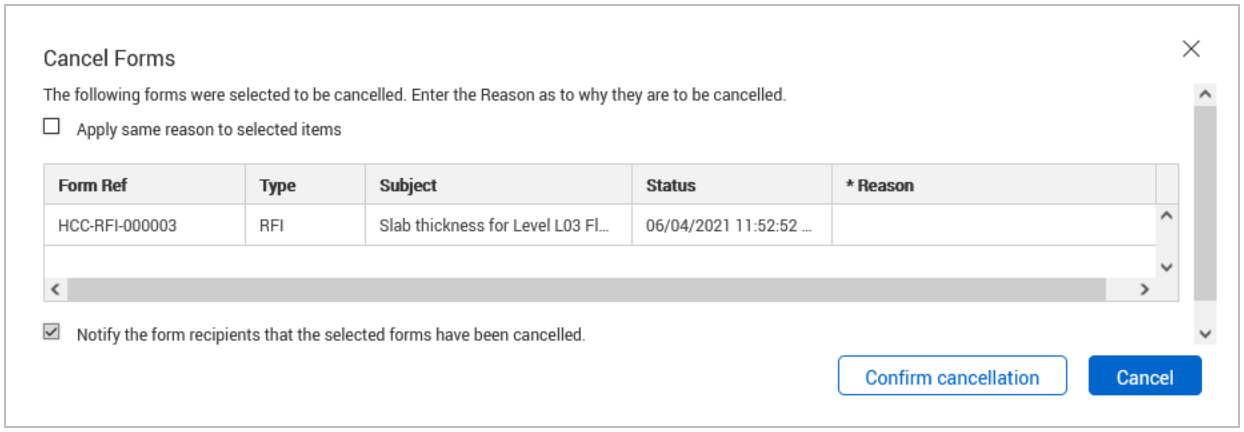
1. Select the form and click the cancel icon..



2. Click **Yes** to confirm the form cancellation.



3. Enter a reason for cancelling the form and Click **Yes**.



NOTE

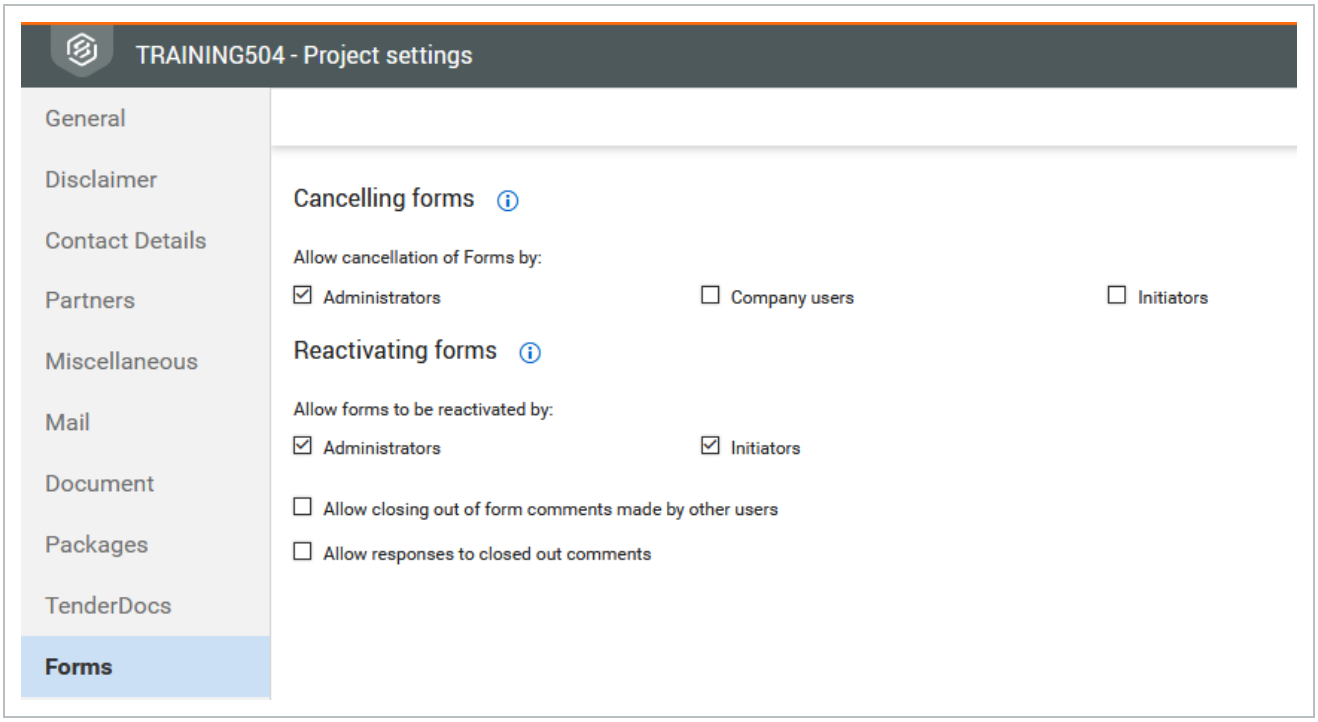
- Once the Form is cancelled Form access is removed and it will be removed from the register.
- The Form can still be filtered and retrieved via the Reports or Advanced Filter options in the Register.

3.3.2 Form Cancellation – Permissions

Administrators control the global settings for who can cancel a form via the forms tab within project settings.

The options are:

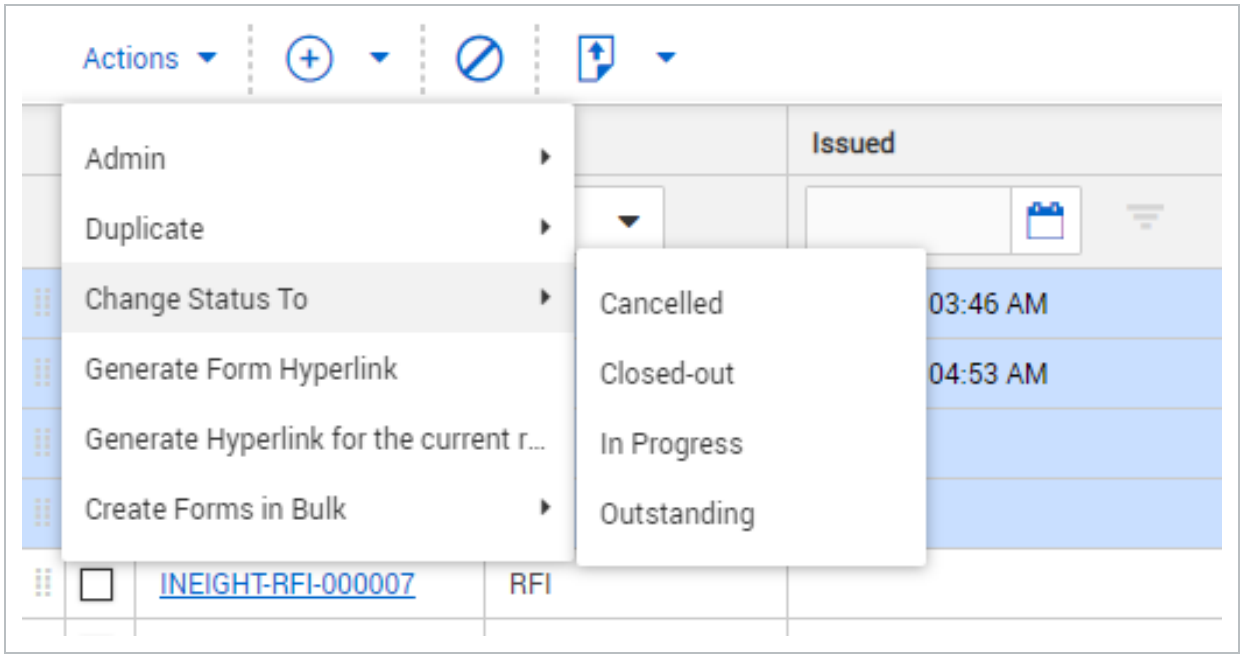
- Administrators (includes primary, additional and company administrators).
- Company users.
- Form initiators.



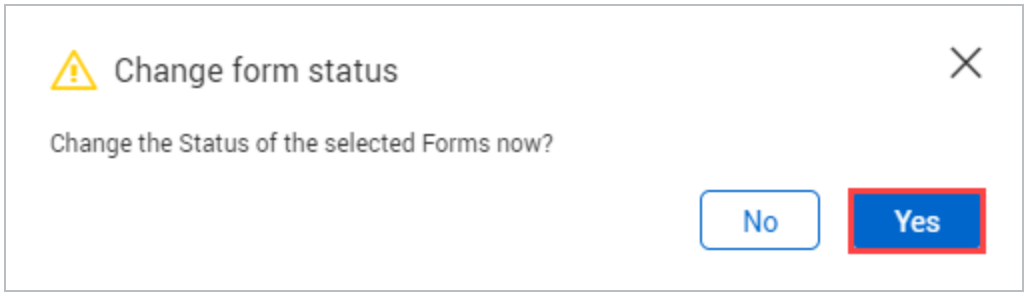
3.4 CHANGING FORM STATUS IN BULK

3.4.1 To change form status in bulk:

1. Select the forms and click **Actions**.
2. In the **Change Status To** menu, select the new status.



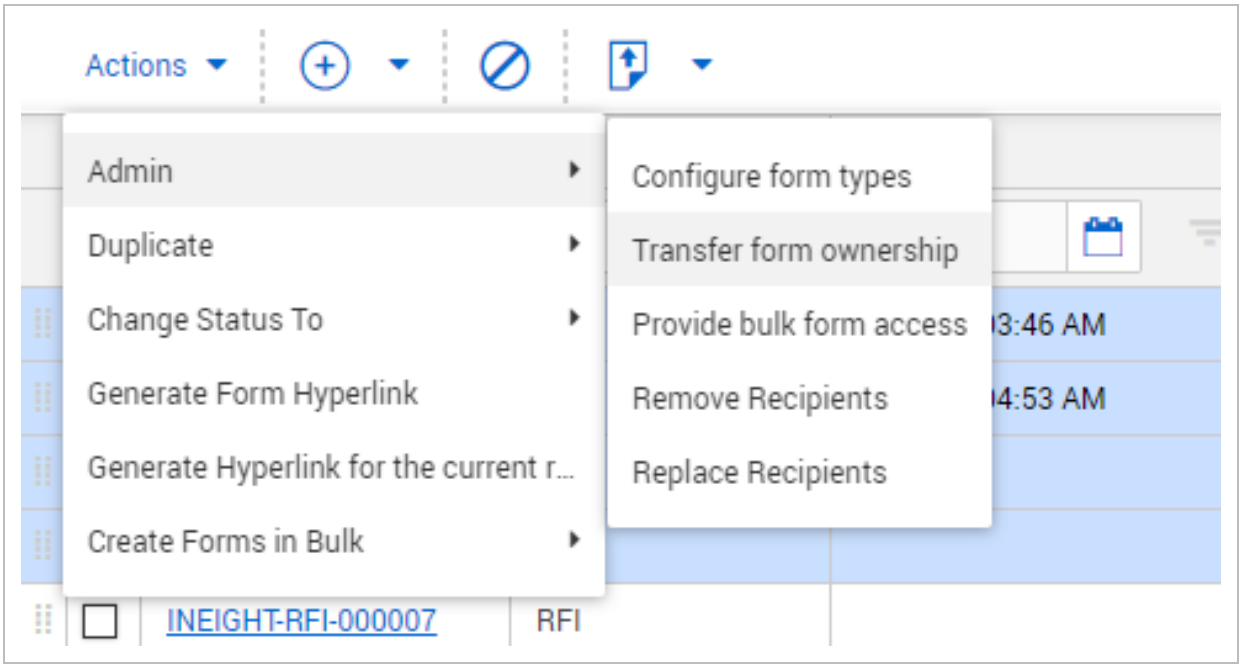
3. Click **Yes**.



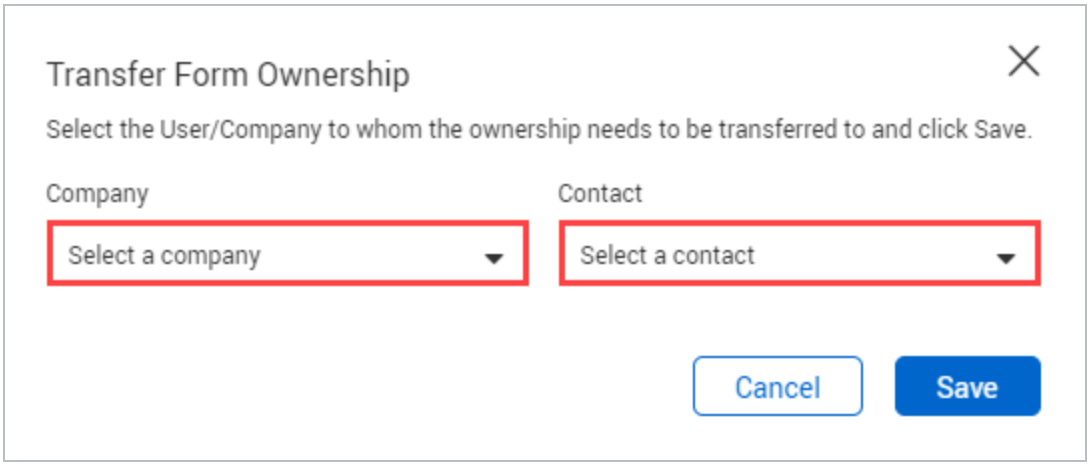
3.5 TRANSFERRING OWNERSHIP OF FORMS

3.5.1 To transfer form ownership:

1. Select the form and click **Actions**.
2. In the **Admin** menu, select **Transfer form ownership**.



3. Select the company and contact.



4. Click **Save**.

3.6 PROVIDING BULK FORM ACCESS

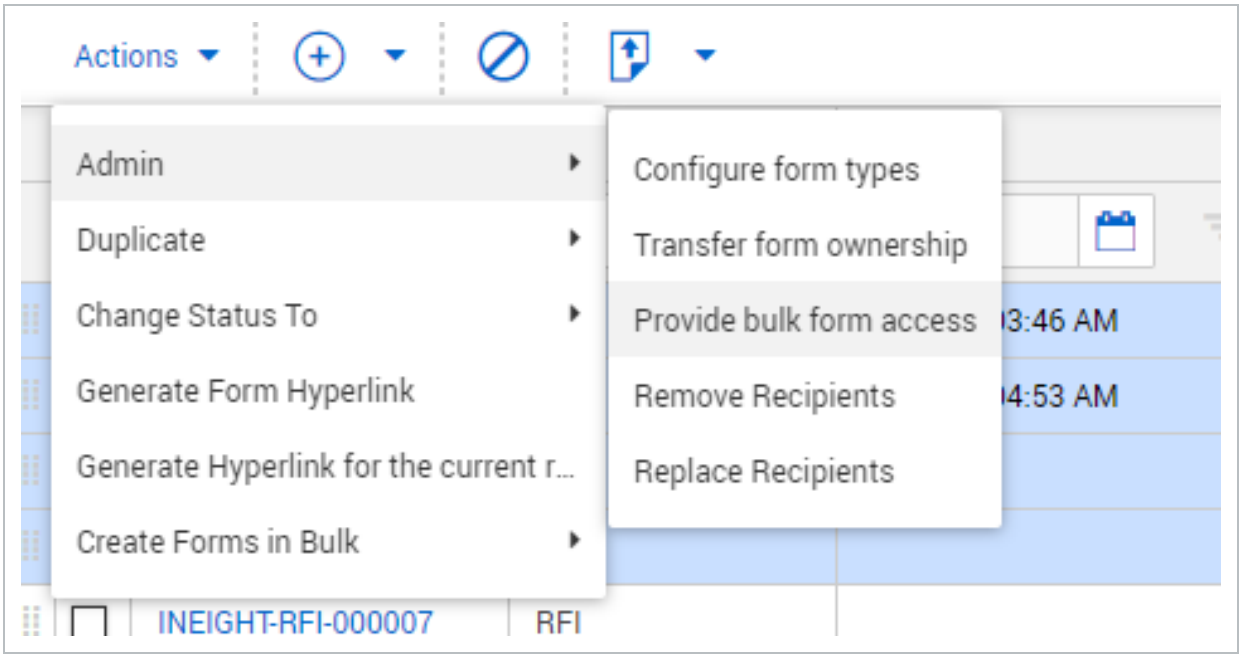
This option allows users to be added to the **For Info** section in bulk. This is useful at the end of a project where another party may need to audit the forms that were generated during the project, without having to reactivate each of the forms individually.

3.6 Step by Step 1 — Grant form access in bulk

Summary: Grant form access when multiple users need access to a form.

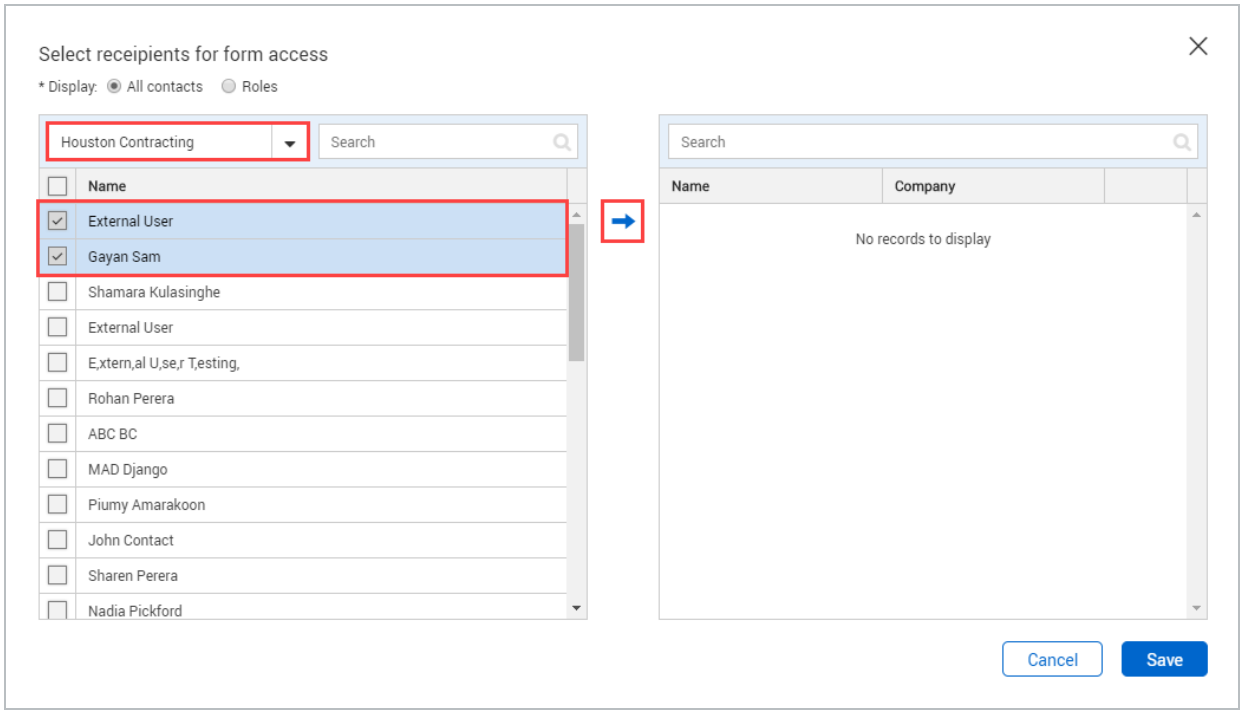
Considerations: If the form has restricted sections, you must have access to those sections to grant access to them.

1. Select the forms and click **Actions**.
2. In the **Admin** menu, select **Provide bulk form access**.

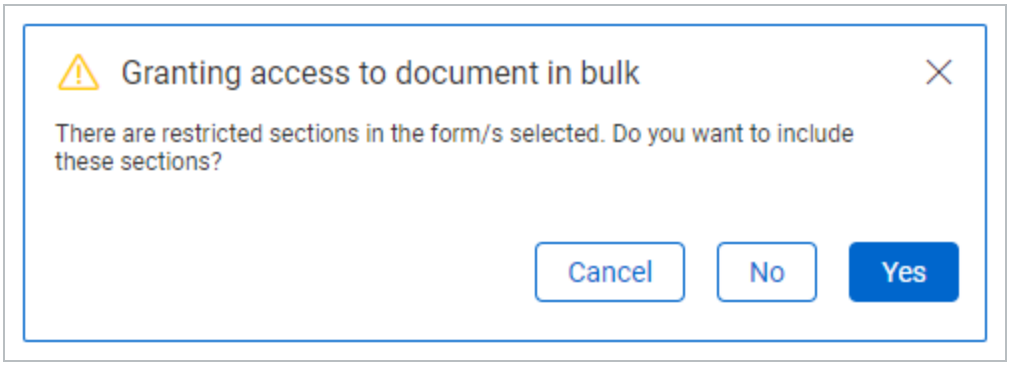


3. Select the company from the drop-down menu.

4. Select the contacts and click the **arrow** icon.



5. Click **Save**. When granting access to forms in bulk, if the form contains restricted sections, you are prompted to grant access to these sections.



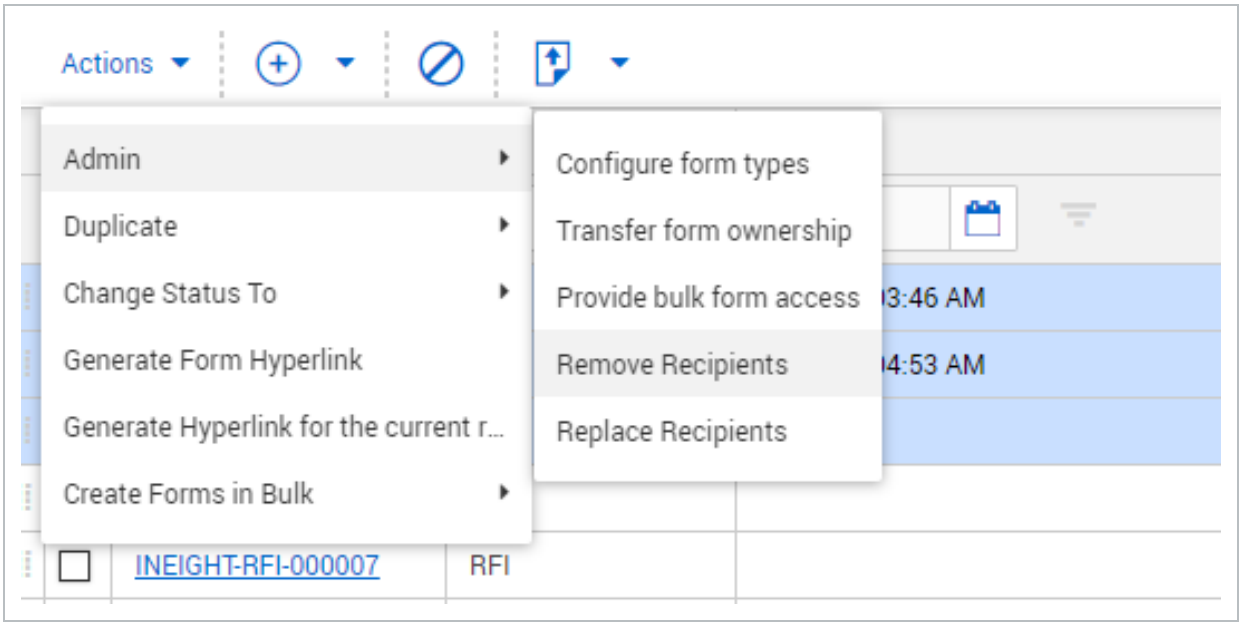
Click **Yes** to grant access to the restricted sections. Click **No** to grant access to the form but not to the restricted section.

3.7 REMOVING AND REPLACING RECIPIENTS IN BULK

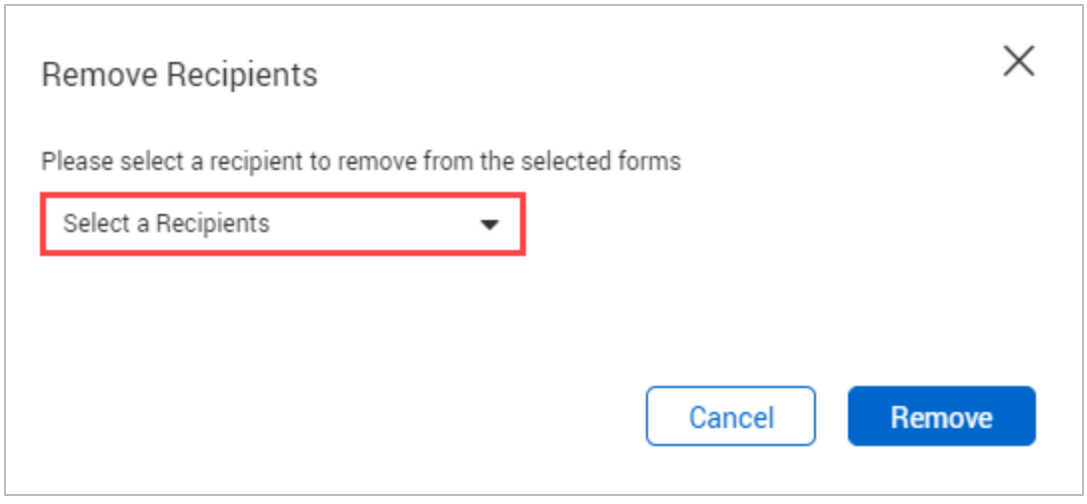
This option allows changes to be made to a form's recipient list in bulk if a form participant is no longer required for a particular action. If a user has completed their step, they cannot be replaced.

3.7.1 To remove recipients in bulk:

1. Select the forms and click **Actions**.
2. In the **Admin** menu, select **Remove Recipients**.



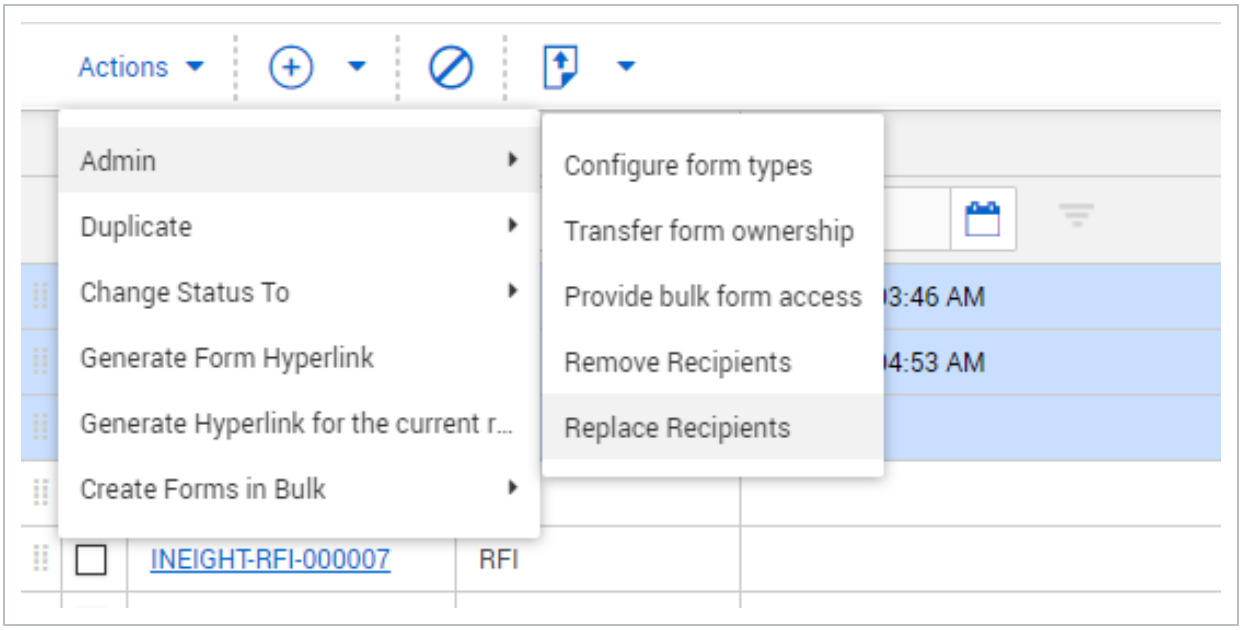
3. Select the recipients to remove.



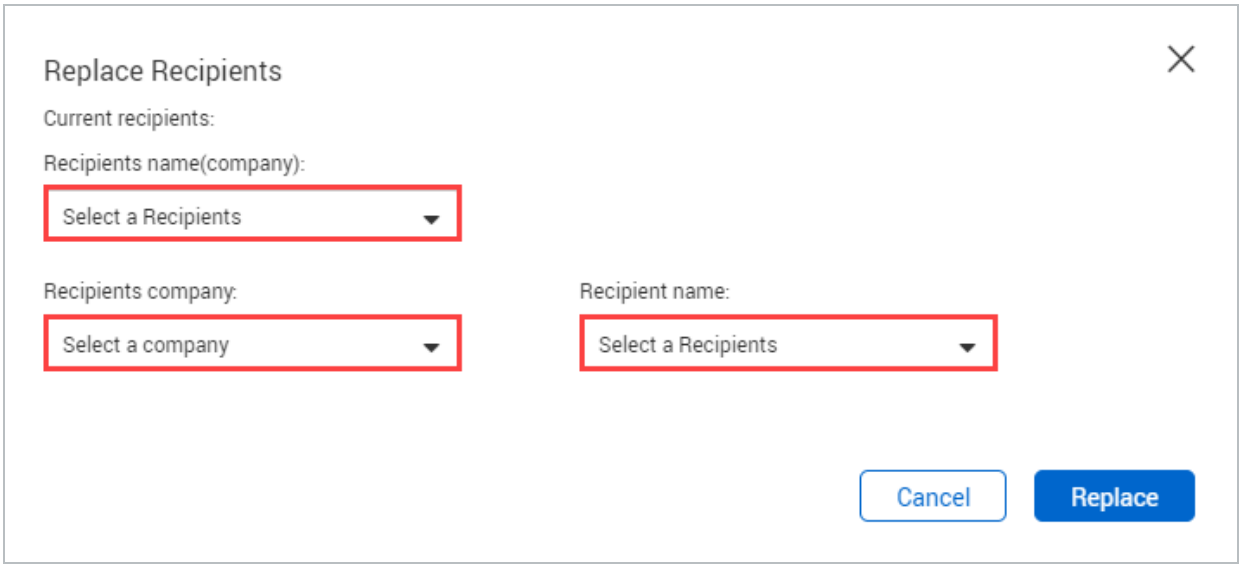
4. Click Remove.
5. Click **Yes**.

3.7.2 To replace recipients in bulk:

1. Select the forms and click **Actions**.
2. In the **Admin** menu, select **Replace Recipients**.



3. Select the current recipient you want to replace.
4. Select the new recipient's company and name.



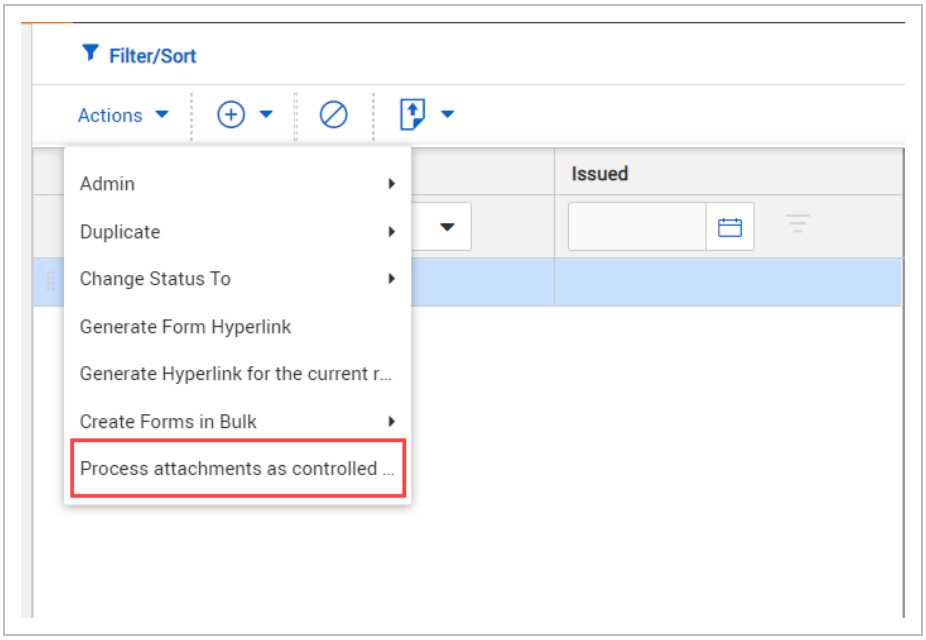
5. Click **Replace**.
6. Click **Yes**.

3.8 PROCESS FORM ATTACHMENTS AS CONTROLLED DOCUMENTS

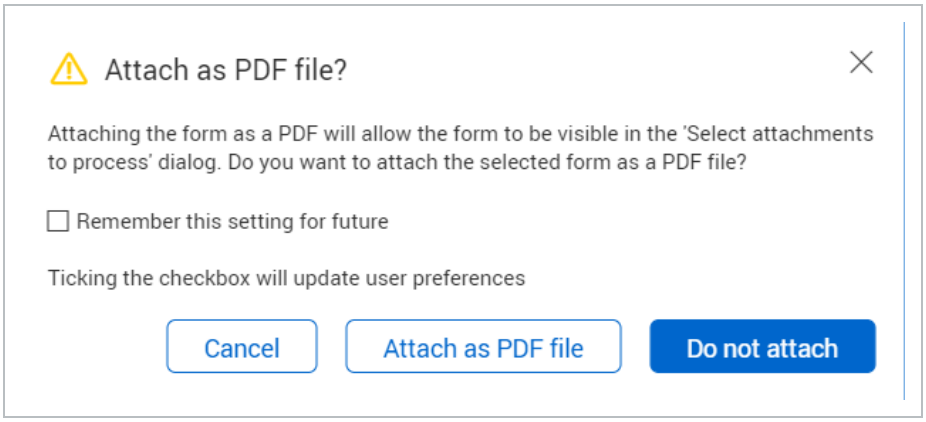
After a form is completed, you can publish the form and any attachments as controlled documents.

Process a form as a controlled document when you want the form to be an official document in the Documents register. You have the option to include attachments as individual PDFs or as a single PDF.

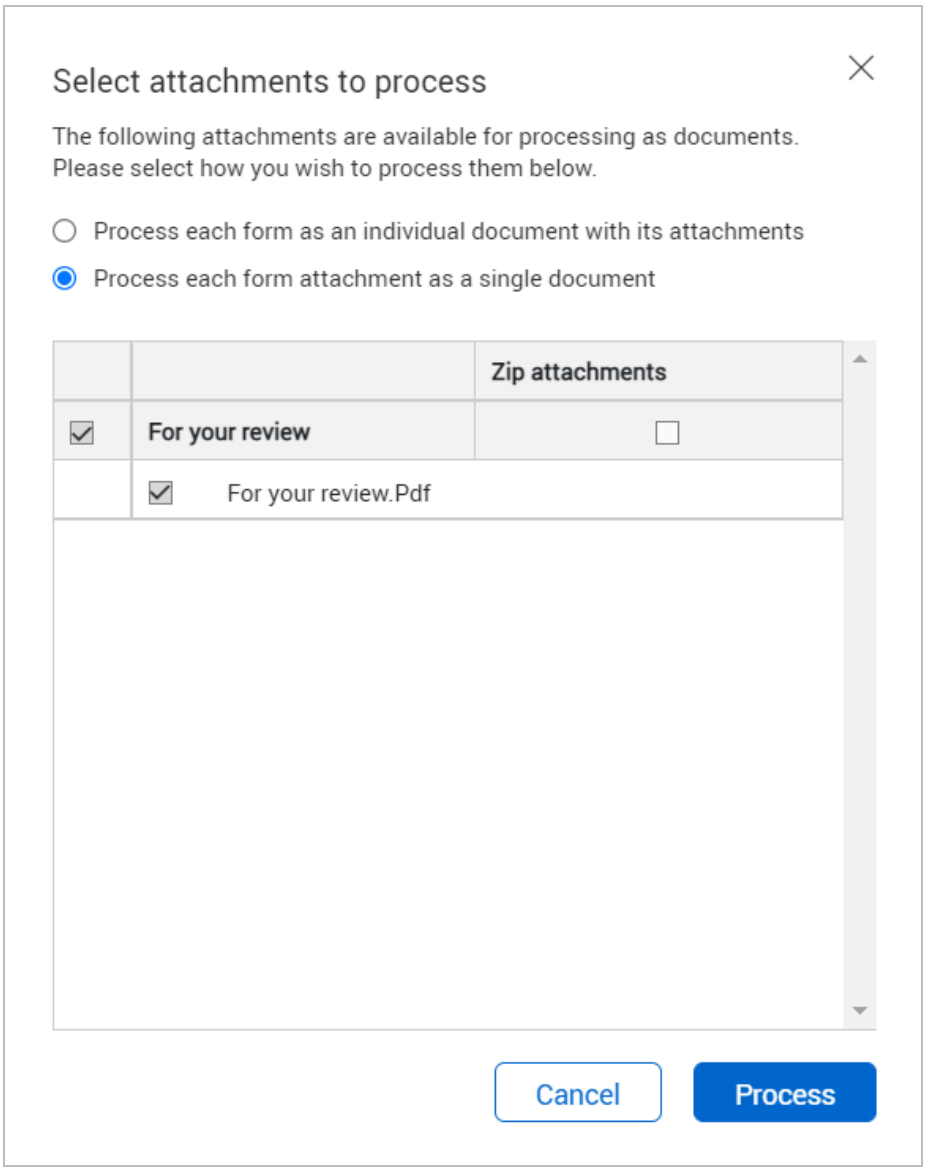
1. Select the form
2. Click **Actions**, and then select **Process Attachments as controlled documents**.



3. Click **Attach as PDF file**.



4. Indicate whether to process each form as an individual document or to process each form attachment as a single document.



5. Select the attachments you want to process.
6. Click **Process** to open the bulk upload window.
7. Enter the document details.
8. Click **Validate**.
9. Click **Save**. The documents are published to the Documents register.

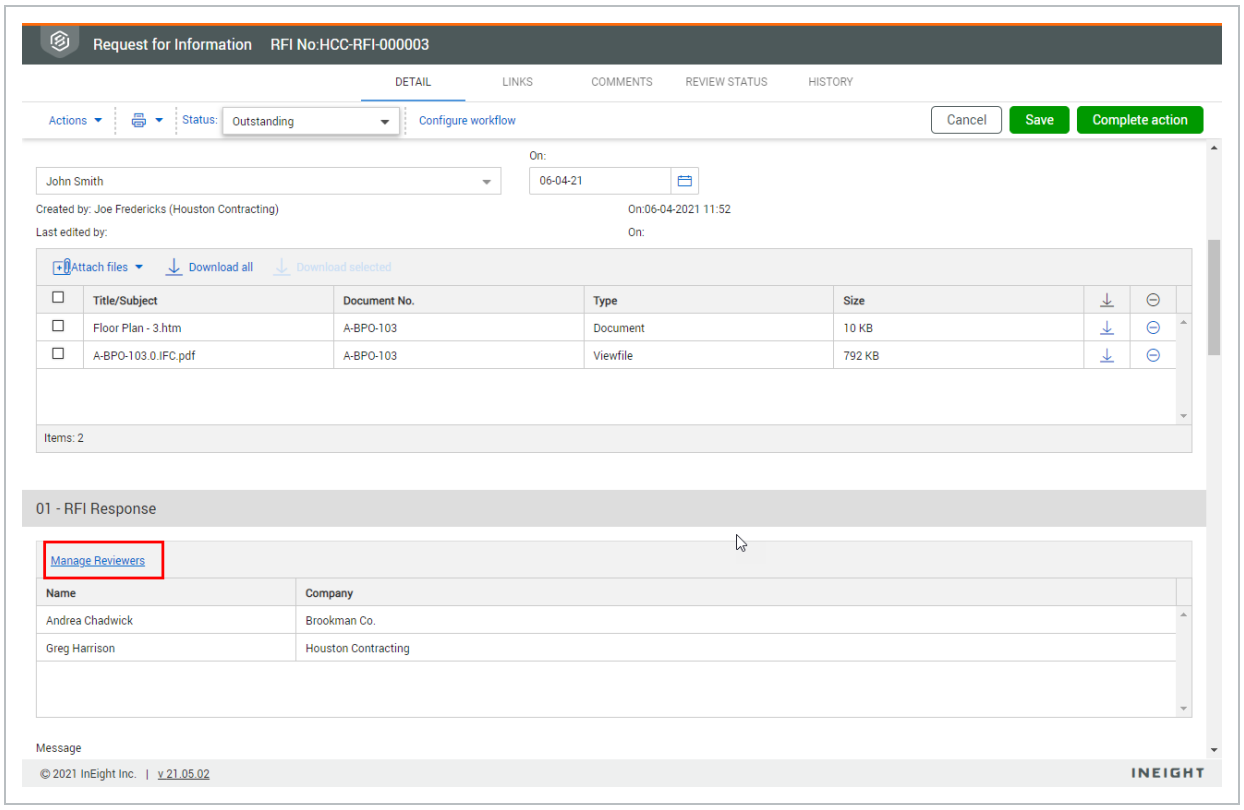
CHAPTER 4 – CONFIGURING FORMS

For information on Configuring Forms, see the links below.

4.1 EDITING FORMS SECTION REVIEWERS (WORKFLOW FORMS ONLY)

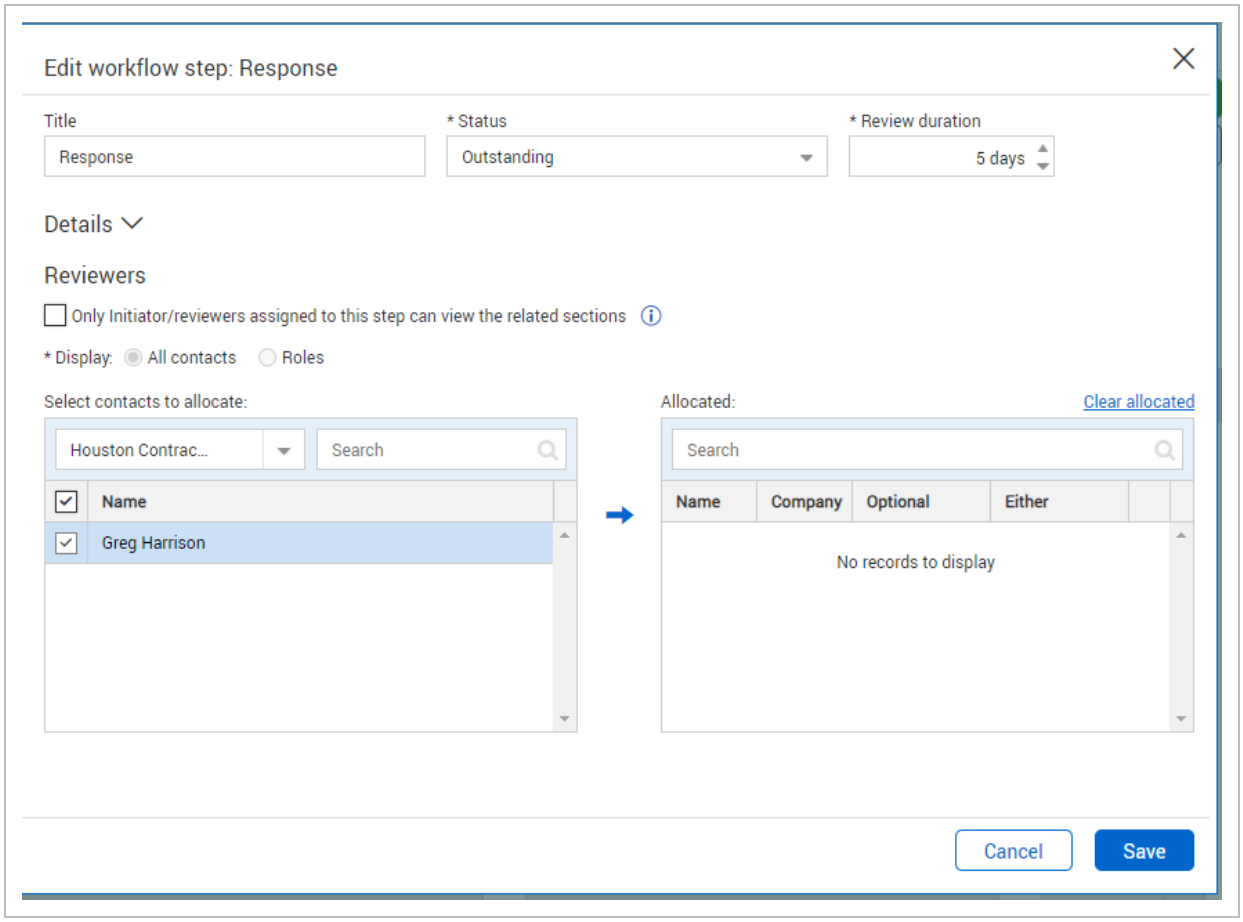
4.1.1 To edit security settings for Forms sections:

1. Open the form.
2. In the relevant section, click **Manage Reviewers**.



3. Select the company from the drop-down menu.

4. Select the contact and click the **arrow icon**.



5. Click **Save**.

4.2 PREPARING A WORKFLOW FORM

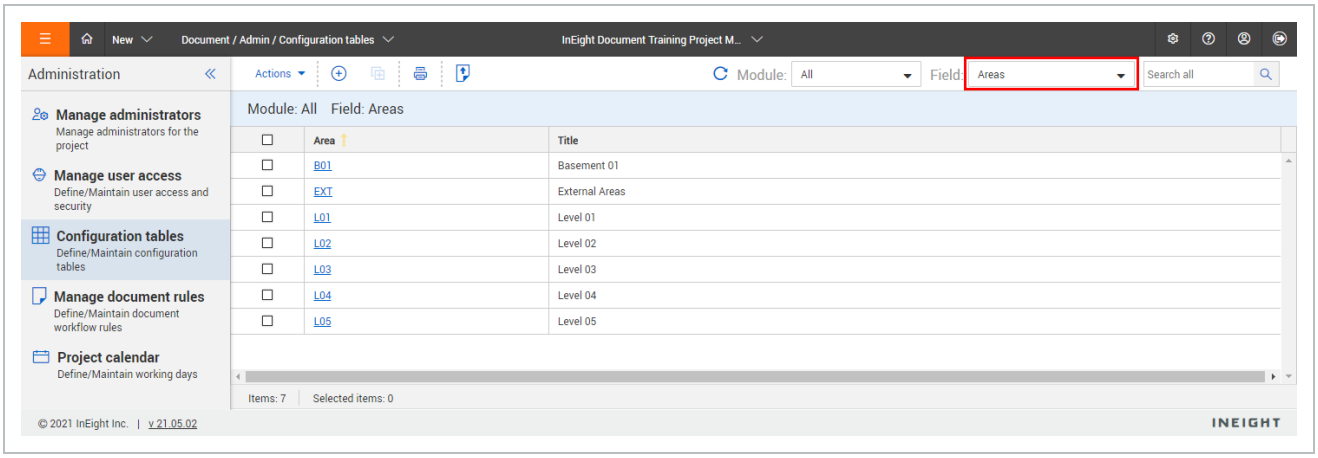
4.2.1 Workflow forms:

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

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

4.2.2 Understanding status codes:

Form status codes are used to help recipients identify which step a form is at and what action is required. The list 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 drop-down 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 usually associated with them.

4.2.3 Understanding workflow steps:

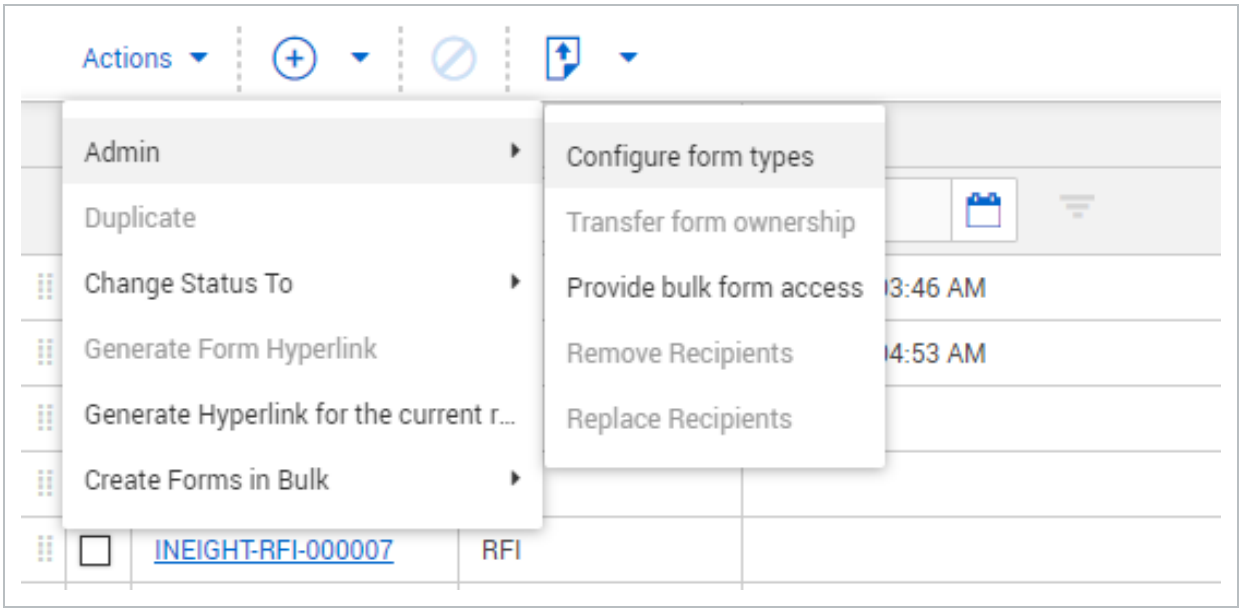
- Workflow steps combine logically to form a workflow that determines the process by which recipients perform actions relating to each section of the form.
- A form must have a mandatory start step (that initiates the form) and an end step (that closes the form).
- Each step must have one or more sections 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 been marked as **Either**.
- Each step is assigned a status, which identifies the status of the form through the workflow.
- At the completion of each step (once Complete Action is clicked), Next Actions are presented to the user. Each Next Action will drive which workflow step is done next. For steps that are

assigned to multiple recipients, the last recipient to complete the step will select the Next Action. The Next Action can also be assigned a status, in which case it will override the step status.

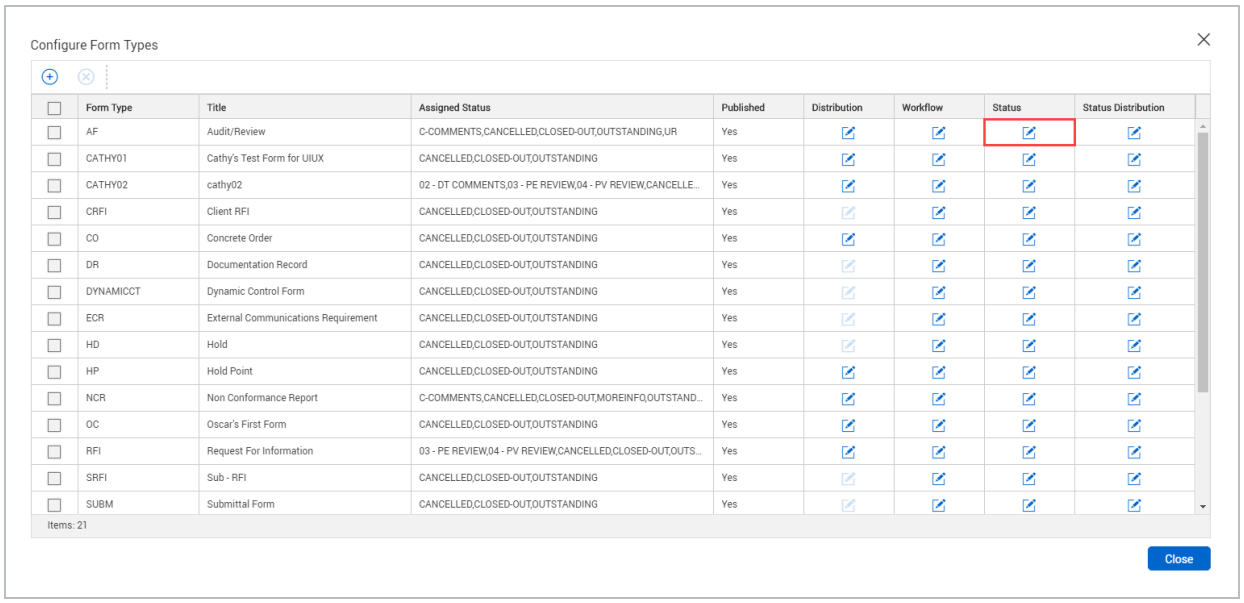
4.3 STATUS VALUES FOR FORM TYPES

4.3.1 To allocate status values for form types:

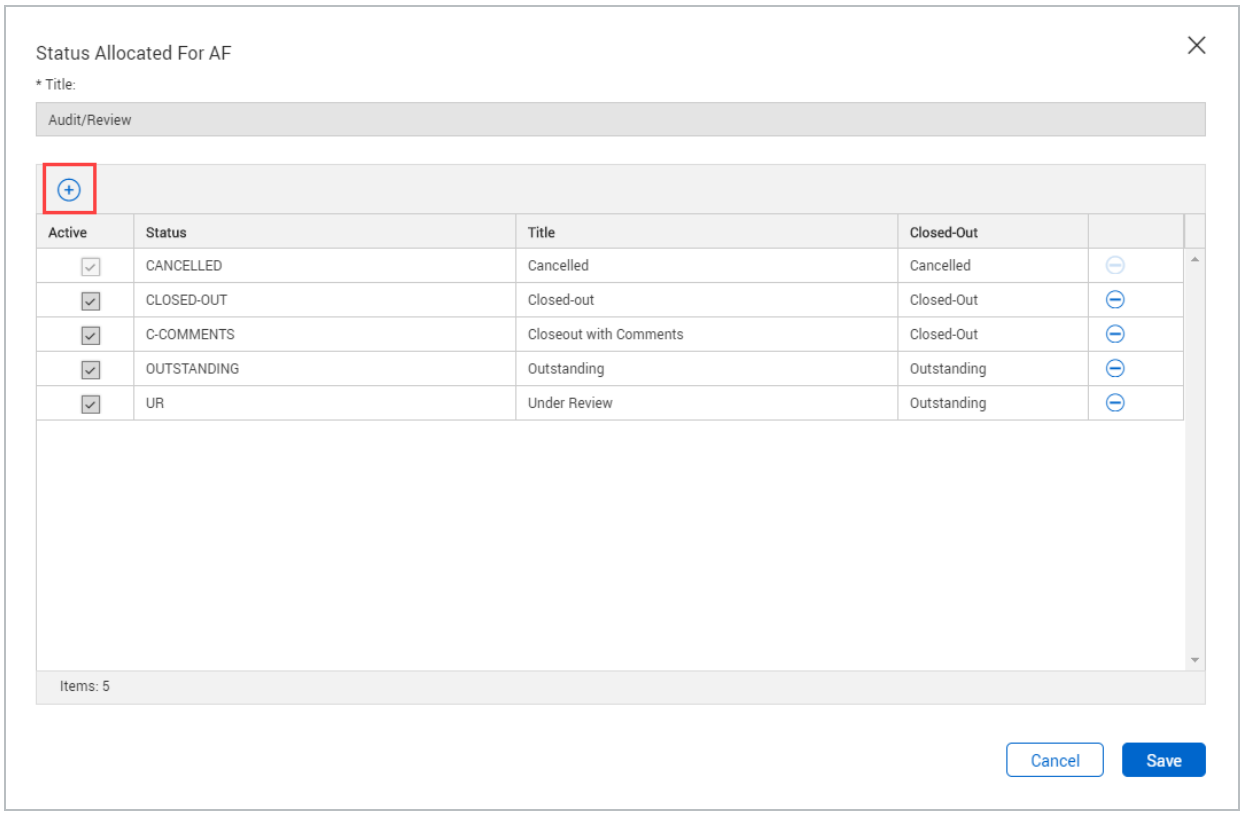
1. Click **Actions**.
2. In the **Admin** menu, select **Configure form types**.



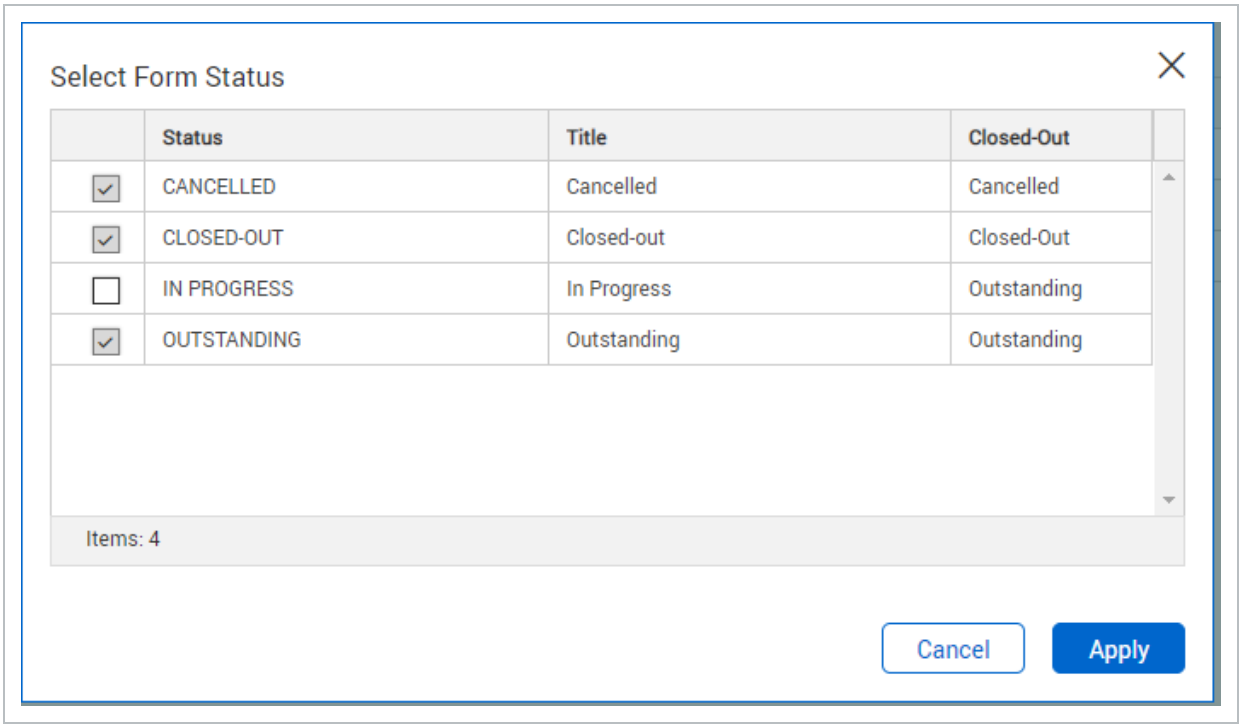
3. Click the **edit icon** of the status you want to edit.



4. Click the **plus icon** to create a new status value.



5. Select the required statuses to be used with the form type.



6. Click **Apply**.
7. Click **Save**.

4.4 CONFIGURING A WORKFLOW FORM TYPE

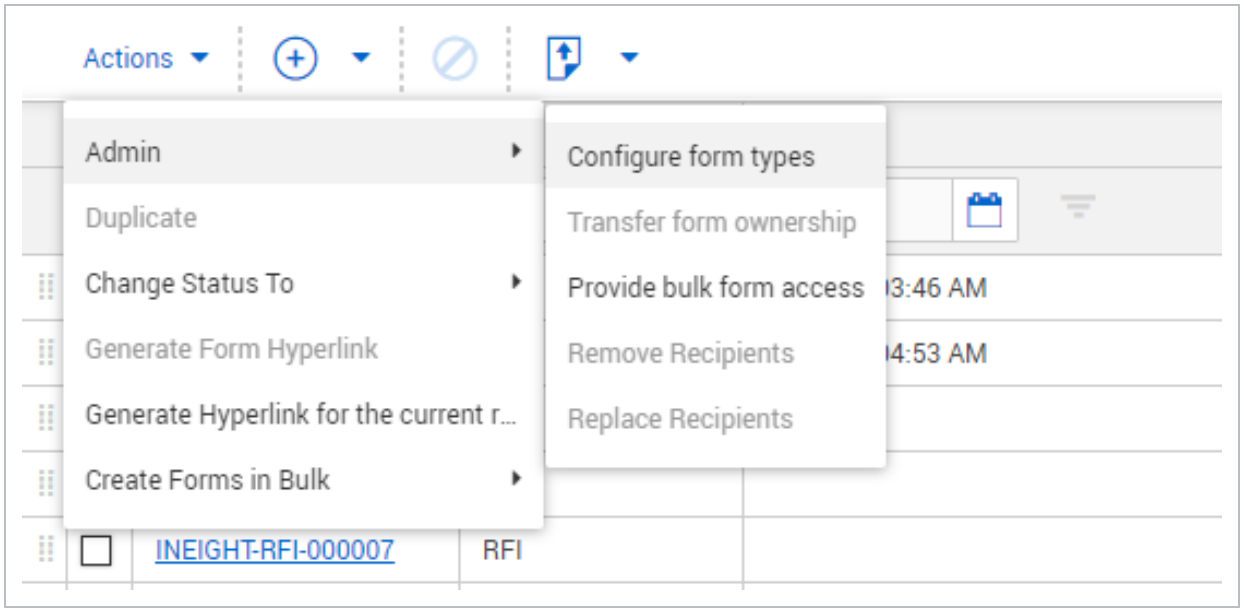
You can configure a form workflow from the Forms register.

4.4 Step by Step 1 — Set up a workflow form

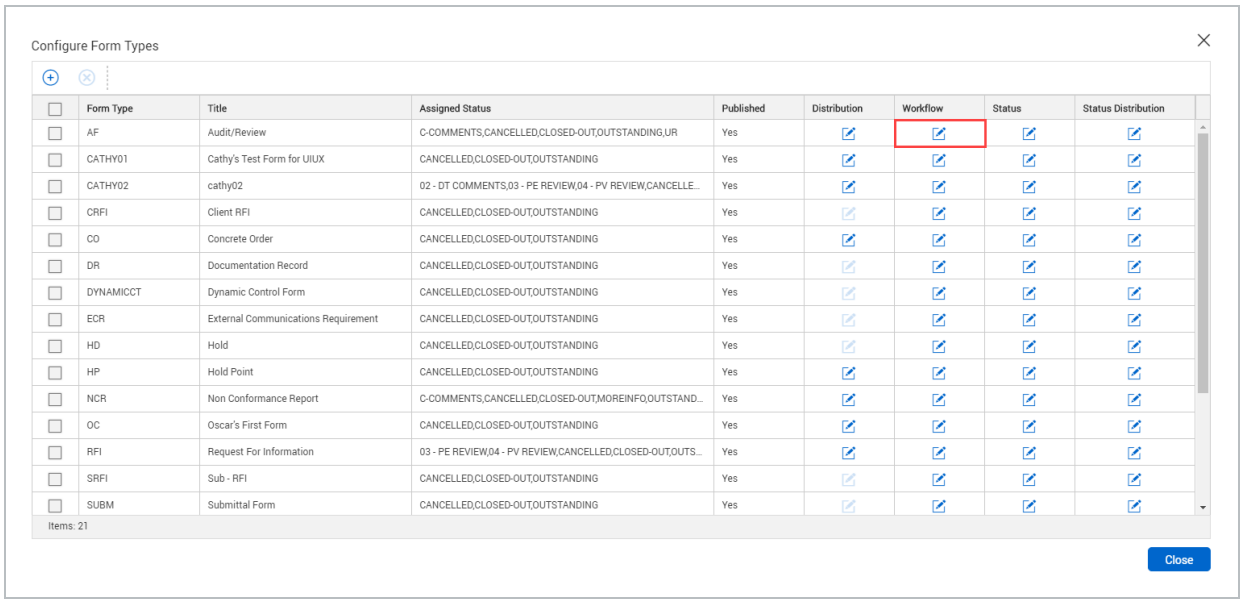
Summary: Configure a workflow form.

Considerations: The history of the specific form will not be visible to any user with *None* set as their access.

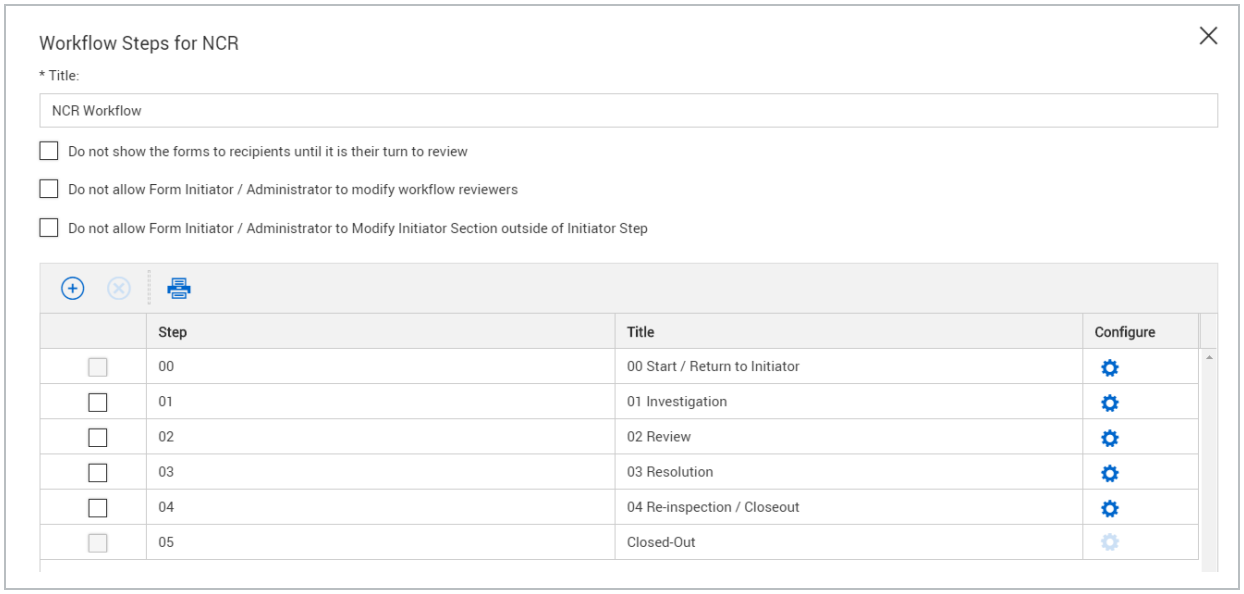
1. From the Forms register, click **Actions**.
2. In the **Admin** menu, select **Configure form types**.



3. Click the **Edit** icon of the workflow you want to edit.

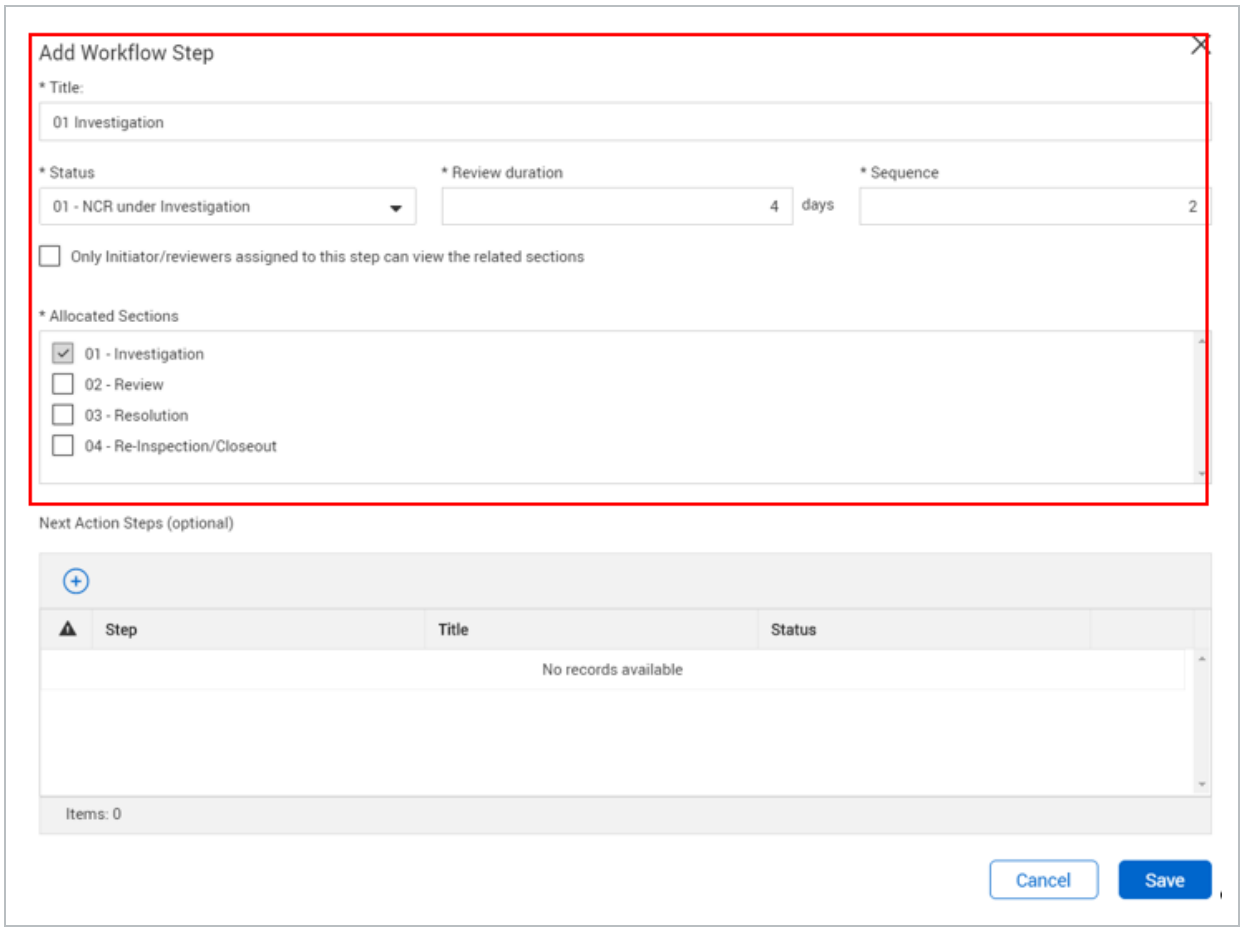


4. Click the **Add** icon.

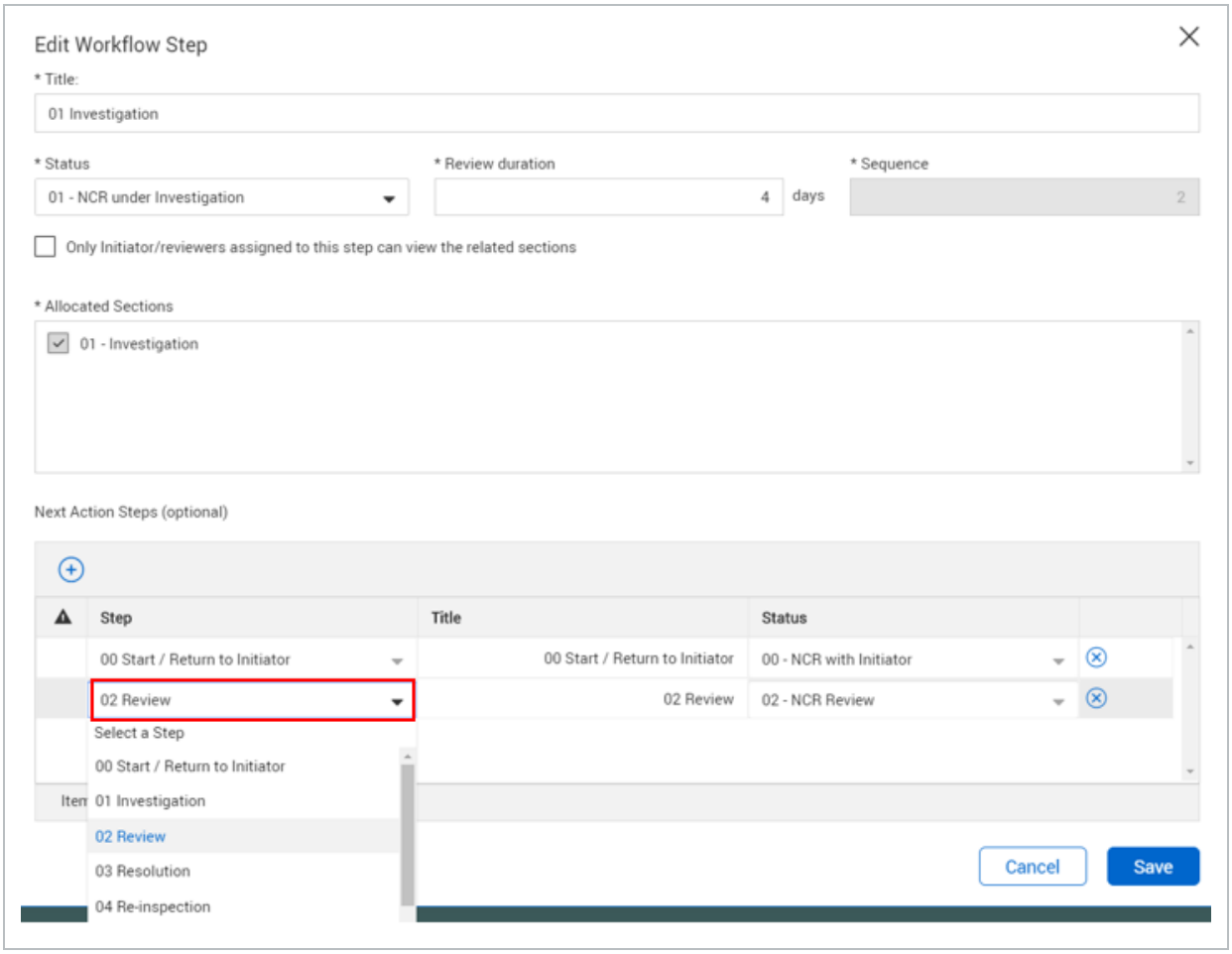


5. For each step, complete the following:
    a. **Title -** indicates the name of the step in the Workflow, can be the name of Section in the form e.g. 01 Investigation
    b. **Status** – Indicates the Status that will be assigned to this step.
    c. **Review duration** – specify how many work days for completion. Once it has gone past the number of days allocated this will appear as an overdue item in the Dashboard widget.
    d. **Sequence** – automatically allocates the next Step in the sequence, once saved cannot be edited

6. Select the allocated sections for that step.

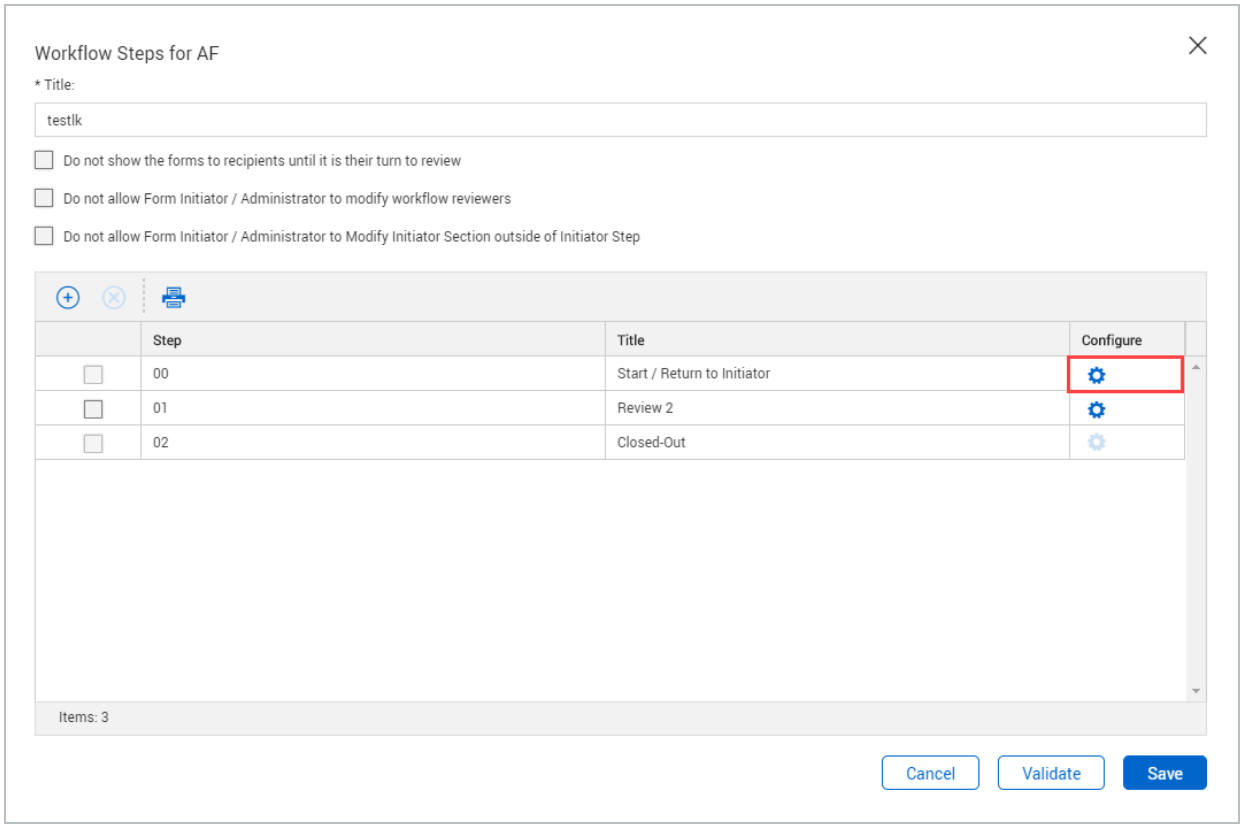


7. Repeat adding steps for each Section of the Form.
8. Specify **Next Action** steps, either one or multiple. Click the **plus icon** and select your options from the drop-down menu.



It is possible to define the **Next Action** to be the same step multiple times, but a different status must be assigned each time. For example, the step might be *Sent for Resolution*; however, the Status might indicate *Allocated to 3rd Party* or *Internal resolution*.

9. Click **Save**.
10. Select the following review rules, if applicable.
    - Do not show the forms to recipients until it is their turn to review
    - Do not allow users to modify workflow reviewers
    - Do not allow Form Initiator / Administrator Section outside of initiator step
11. Specify the number of days before and after the due date that reminder notifications are sent to reviewers.
12. Additional options are available to the workflow configuration, such as restricting viewing a step to only the form initiator and reviewers. Click the **Configure** icon.

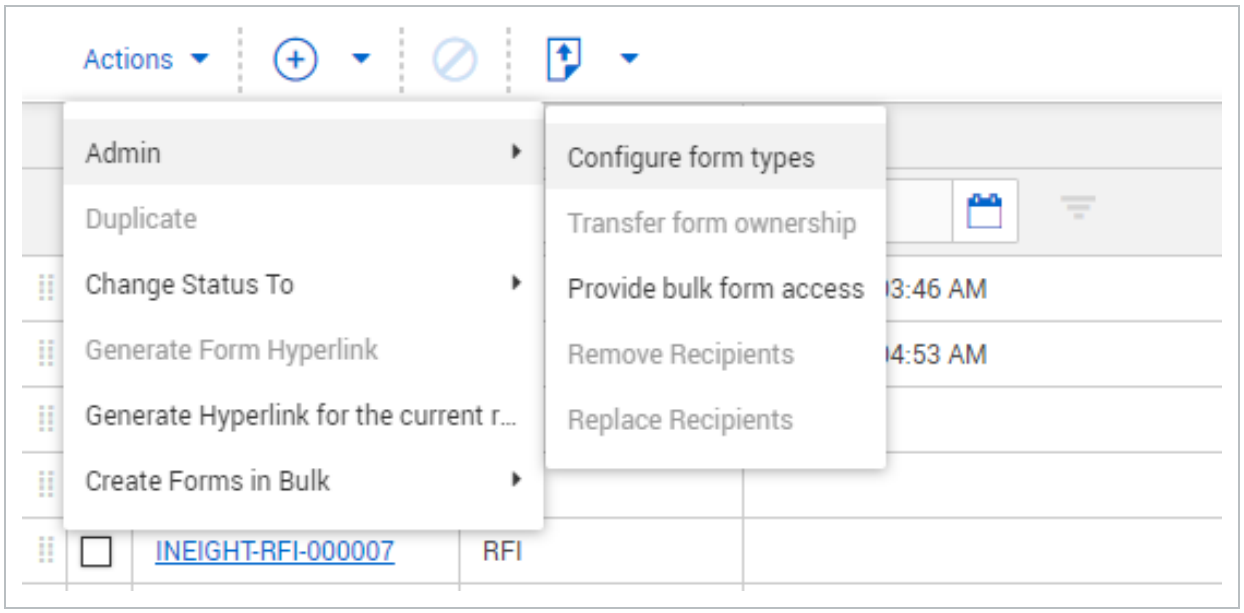


12. Click **Save**.

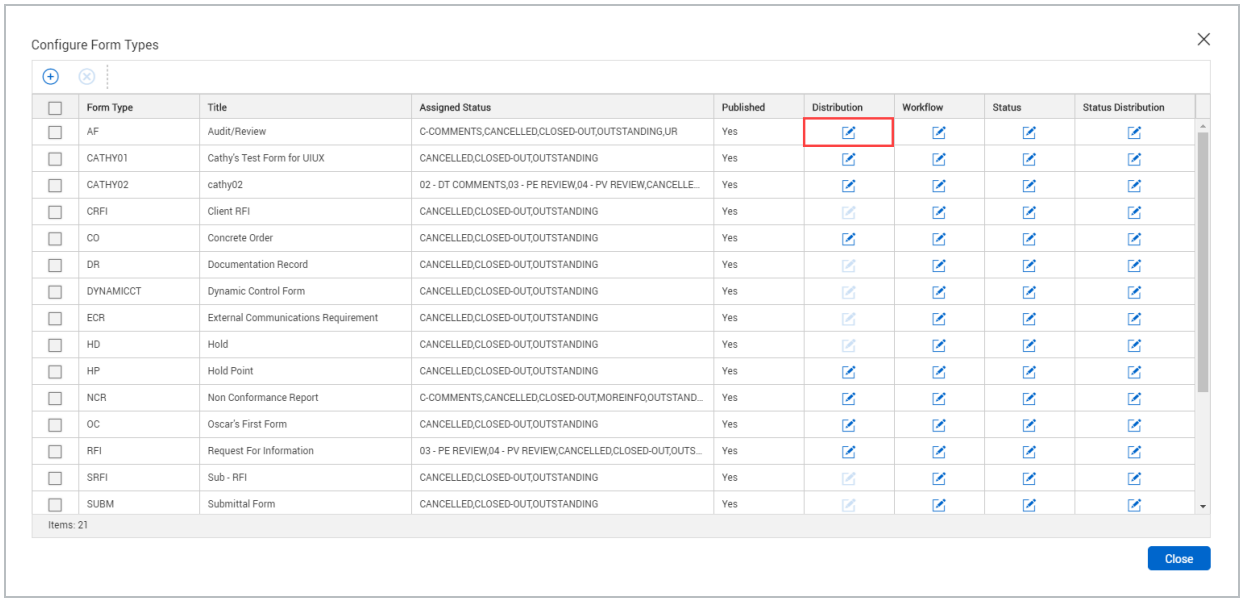
4.5 MANAGING REVIEWERS AND DISTRIBUTION GROUPS

4.5.1 To manage reviewers and distribution groups:

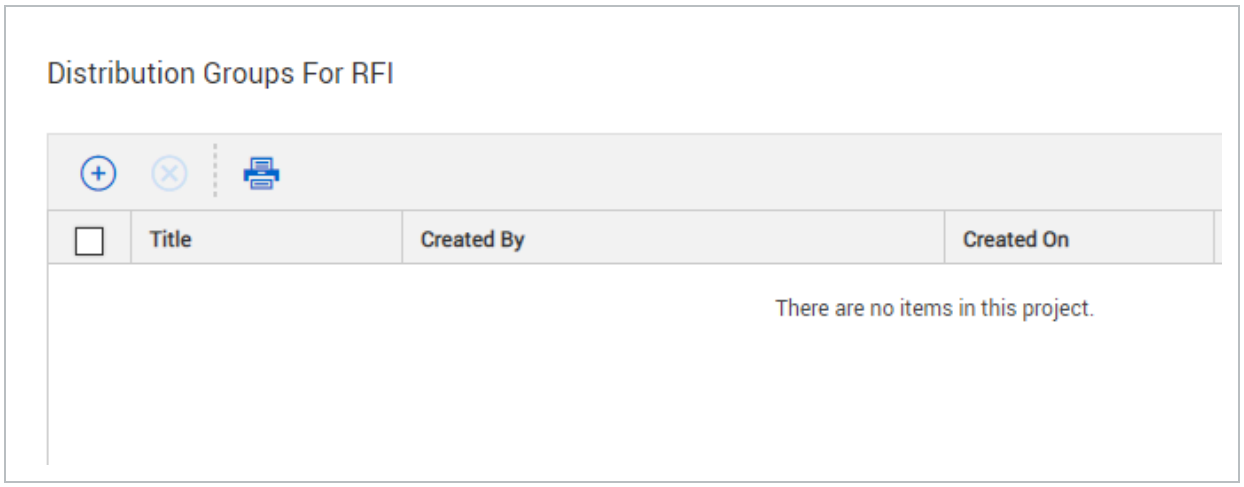
1. Click **Actions**.
2. In the **Admin** menu, select **Configure form types**.



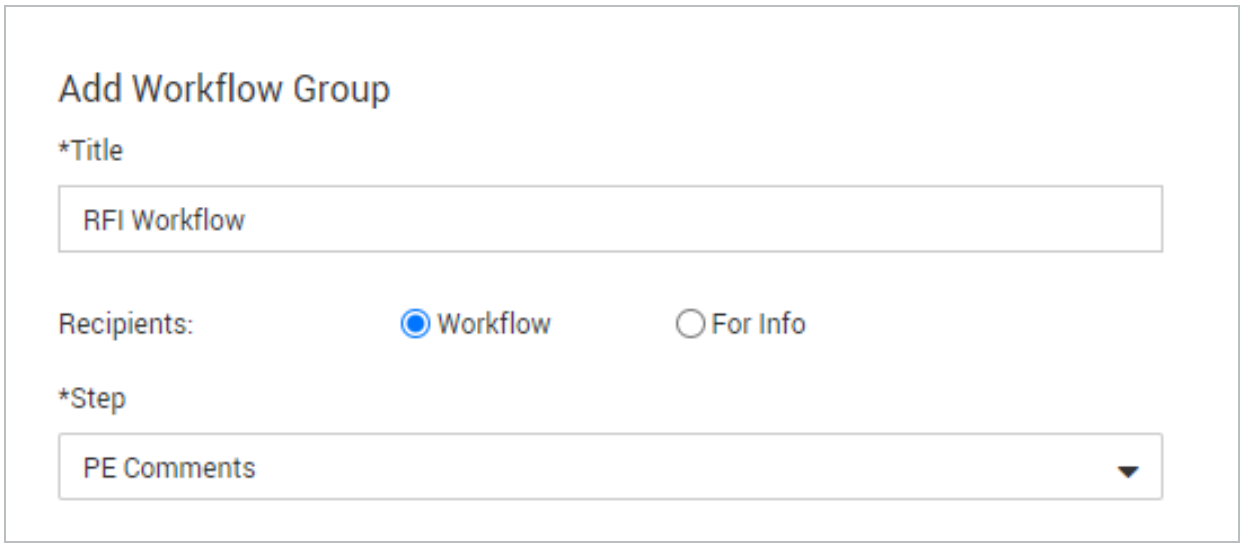
3. Click the **edit icon** of the distribution group you want to edit.



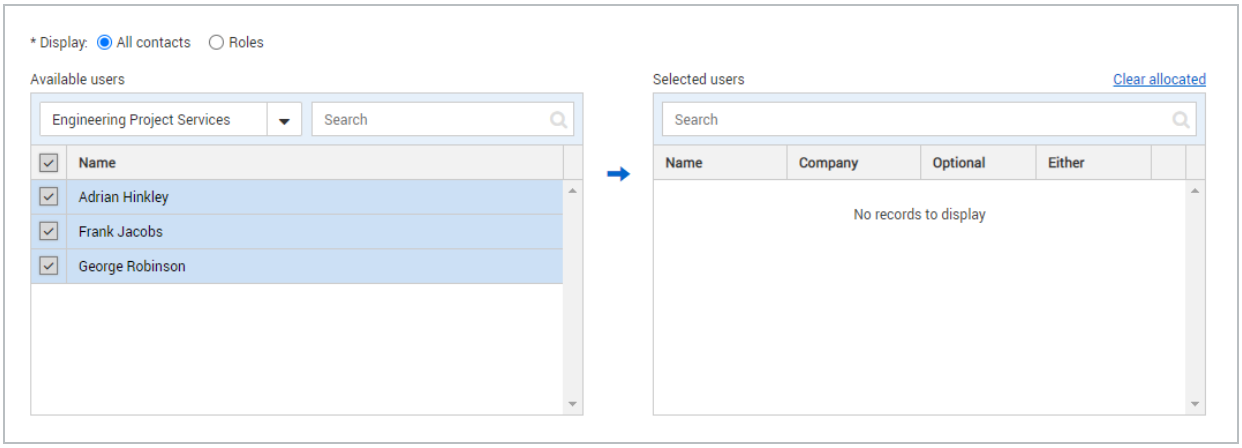
4. Click the **plus icon** to add a new distribution group.



5. For each new workflow group, fill out a Title and select a Step



6. Select the All contacts or Roles radio button. Use the dropdown to select the Company and select the contact and click the **arrow icon** to add the reviewer.



7. Click **Save**.

NOTE

- Available in workflow forms only.
- Edit distribution groups by clicking on the title.
- Responsible recipients 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 (which can be changed 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).

CHAPTER 5 – APPLYING FORMS SECURITY SETTINGS

For information on Applying Forms Security Settings, see the links below.

5.1 UNDERSTANDING FORMS ACCESS RULES

5.1.1 Access to the Forms module is controlled at three levels:

- **Security group:** Defines whether users in a group have personal, department or company access levels.
- **Read/Send access:** Defines whether users have read or send access.
- **Read:** A user can contribute to a form and be part of the form's distribution.
- **Send:** A user has access to initiate this type of form via the New > Forms menu.
- **Per form basis:** Defines whether access is controlled on a **For Info/For Action** basis on each form.

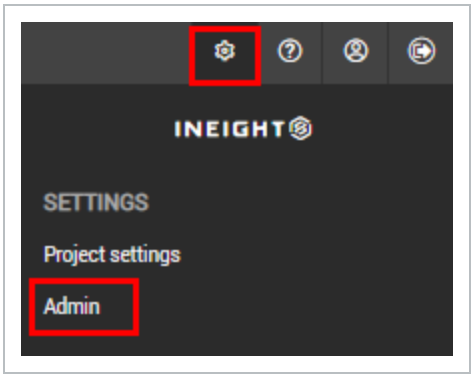
5.1.2 Access rules per form are as follows:

- Users who have company/department 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** participants are not required to fill in a particular section.
    - **For Action** participants have access to a section and can specify reviewers or delegate sections by clicking **Manage Reviewers** on the form.

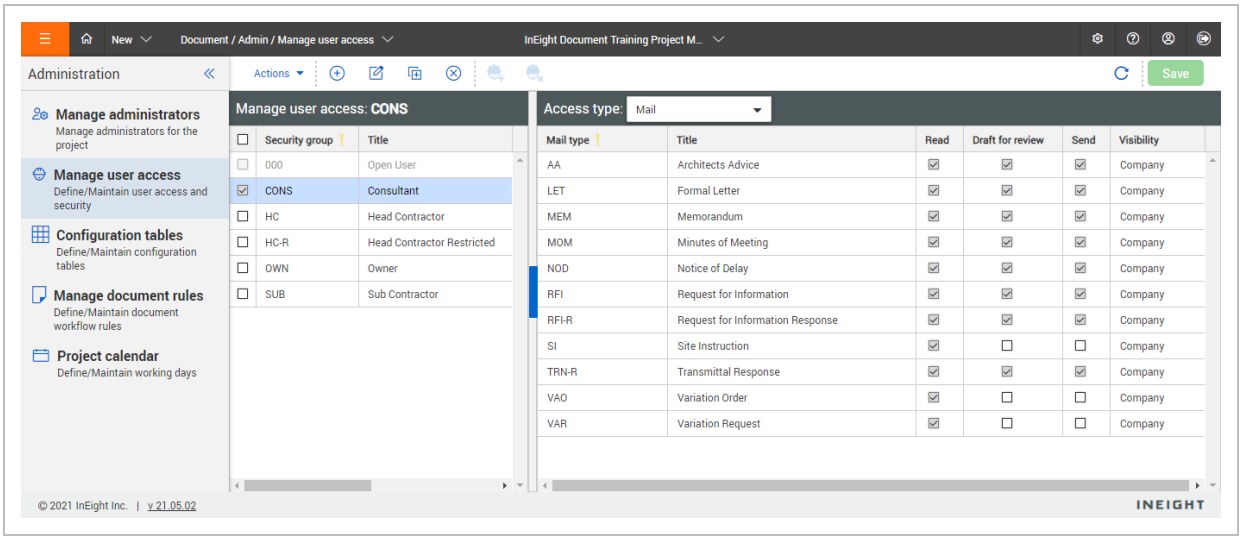
5.2 ACCESSING USER SECURITY SETTINGS

5.2.1 To access user security settings for forms:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Manage user access**.
3. Click the **Access type** drop-down menu and select **Forms**.
4. Select the security group.



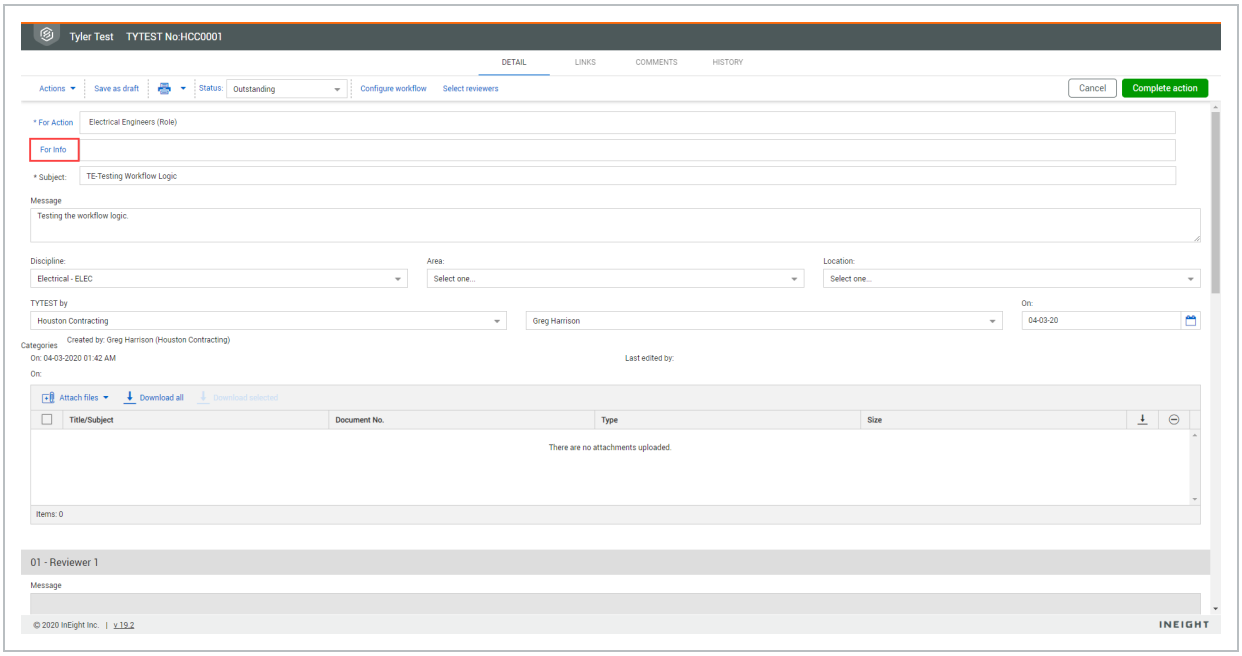
5. Select the checkboxes to give the users **Read** and **Send** access to each form type.
6. Click **Save**.

5.3 EDITING USER ACCESS SETTINGS

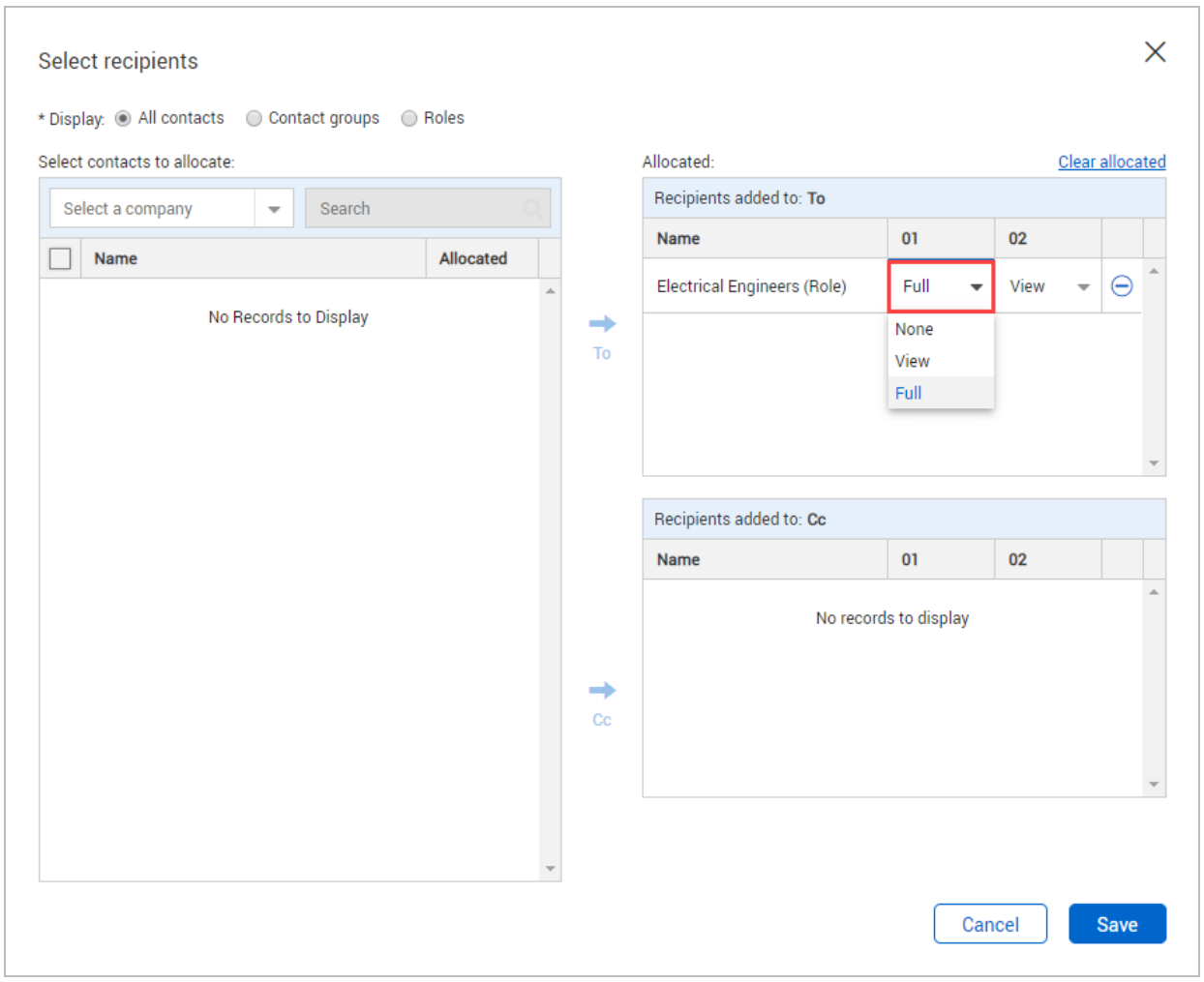
In addition to standard Forms section rules, the level of user access can be modified when recipients are added to the **For Info** section of the form (non-workflow only).

5.3.1 To edit user access for forms:

1. Open the form.
2. Click **For Info**.



3. Select the access level for the reviewer.



5.3.2 The levels of user access are as follows:

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 this option set as their access level.

View: The user can only view the form.

Full: The user can create and fill out this section of the form.