

# QUICK GUIDE

# FORM SETUP ESSENTIALS



## PART 1 – CREATE FORM STATUS CODES

Form Status Codes help recipients identify which step a Form is at and what action is required.

1. From the top-right settings menu, click **Admin**.
2. Select **Configuration Tables**.
3. Select **Forms** ► then **Form Status Codes** from the Module and Field drop-down menus.

Module: **Forms** Field: **Form Status Codes**

4. Click the **plus icon** to create a status new code.
5. Enter in the new **Form Status** fields, the **Type** and click **Save**.

**New form status codes**

\* Form Status

01 - INVESTIGATION

Type

☒ Outstanding ☐ Closed-Out

\* Title

01 - Investigation

☐ Make inactive ☐ Include inactive codes in filters

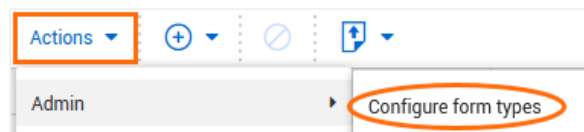
### NOTE

- Use a number in front of the status since statuses are listed in alpha/numeric order.

## PART 2 – DEFINE AVAILABLE STATUSES

From the Forms Register:

1. Click **Actions** and hover over **Admin** ► then **Configure form types**.



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

<input type="checkbox"/>	Form Type	Title	Assigned status	Publish	Distribu	Workflow	Status
<input type="checkbox"/>	NCR	Non Conformance...	00 - RETURN TO	Yes			

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

Status Allocated For NCR

\* Title:

Non Conformance Report

Active	Status	Title	Closed-Out
<input checked="" type="checkbox"/>	00 - RETURN TO INITIATOR	00 - Return to Initiator	Outstanding
<input checked="" type="checkbox"/>	02 - REVIEW	02 - Review	Outstanding
<input checked="" type="checkbox"/>	03 - RESOLUTION	03 - Resolution	Outstanding

4. Select the required statuses ► then **Apply**.

Select Form Status

Status	Title	Closed-Out
<input checked="" type="checkbox"/>	00 - RETURN TO INITIATOR	00 - Return to Initiator
<input type="checkbox"/>	01 - INVESTIGATION	01 - Investigation
<input checked="" type="checkbox"/>	02 - REVIEW	02 - Review

Items: 8

**Apply**

## PART 3 – CREATE WORKFLOW STEPS (1)

Workflow Steps determine the process by which recipients perform actions relating to each section of the Form. All steps must be created before Next Steps can be allocated.

From the Forms Register:

1. Click **Actions** and hover over **Admin** ► then **Configure form types**.
2. Click the **edit icon** under the Workflow column for the appropriate Form Type.

<input type="checkbox"/>	Form Type	Title	Assigned status	Publish	Distribu	Workflow
<input type="checkbox"/>	NCR	Non Conformance...	00 - RETURN TO	Yes		

3. Enter a title for the Workflow.
4. Click the **plus icon** to add a Workflow Step.

**Workflow Steps for NCR**

\* Title:

NCR

☐ Do not show the forms to recipients until it is their turn to review

☐ Do not allow Form Initiator / Administrator to modify workflow reviewers

☐ Do not allow Form Initiator / Administrator to Modify Initiator Section outside

Step
00
04

Items: 5

5. Enter in the details for the new Workflow Step

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## PART 3 – CREATE WORKFLOW STEPS (2)

6. Enter in the details for the new Workflow Step (continued).

**Annotations:**

- Suggested Title format:** "Number – Step Title" (referring to the Title field).
- At least one form section must be allocated to each step.** (referring to the 'Allocated Sections' list).
- The sequence determines the order the step will appear in the list.** (referring to the 'Sequence' field).
- The action steps allow form participants to progress the workflow after completing a selection.** (referring to the 'Next Action Steps' list).

7. Click **Save**.

8. Click **Validate** to ensure all sections are properly assigned ► then **Save**.

	Step	Title	Configure
<input type="checkbox"/>	00	Start / Return to Initiator	
<input type="checkbox"/>	01	01 - Investigation	

Items: 6

**Buttons:** Cancel, **Validate**, Save

## PART 4 – ASSIGN FORM PARTICIPANTS

**From the Forms Register:**

1. Click Actions and hover over Admin, ► then Configure form types.
2. Click the edit icon under Distribution next to the required Form.

<input type="checkbox"/>	Form Type	Title	Assigned status	Published	Distribution	Workflow	Status
<input type="checkbox"/>	NCR	Non Conformance Report	CANCELLED,CLOSED-OUT,OUTSTANDING	Yes			

**Note:** Form participants need access to the Form module via Security Groups.

3. Existing distribution groups are listed. Click on the distribution group title to edit an existing group or the plus icon to create a distribution list for the Form type.

4. Enter the details for the Distribution List.

**Annotations:**

- Default group can be set for other users on the project or in your company.** (referring to the 'Set as default group' checkbox).
- Workflow recipients will take part in the form. For Info recipients can only view it.** (referring to the 'Recipients' section).
- Recipients must be assigned to each step of the Workflow.** (referring to the 'Step' dropdown).
- Select, then add recipient(s) to the step using the arrow.** (referring to the 'Available users' list and the arrow button).
- Save each time a user is assigned or after switching between Workflow and For Info.** (referring to the 'Save' button).