

PART 1 – CREATE FORM STATUS CODES

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

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

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

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

New form status codes

* Form Status

Type

Outstanding Closed-Out

* Title

Make inactive Include inactive codes in filters

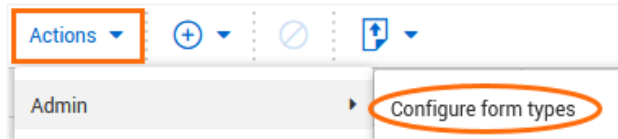
NOTE

- 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:

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



- 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			

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

Status Allocated For NCR

* Title:

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

- Select the required statuses then **Apply**.

Select Form Status

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

Items: 8

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:

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

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

Workflow Steps for NCR

* Title:

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

<input type="checkbox"/>	Step	
<input type="checkbox"/>	00	
<input type="checkbox"/>	04	

Items: 5

- Enter in the details for the new Workflow Step

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FORM SETUP ESSENTIALS



PART 3 – CREATE WORKFLOW STEPS (2)

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

*** Title:** Investigation *Suggested Title format: "Number - Step Title"*

*** Status:** Outstanding *** Review duration:** 2 days *** Sequence:** 2 *The sequence determines the order the step will appear in the list.*

Only Initiator/reviewers assigned to this step can view the related sections

*** Allocated Sections:** 01 - Investigation *At least one form section must be allocated to each step.*

Next Action Steps (optional)

Step	Title	Status
Start / Return to Initiator	Start / Return to Initiator	Outstanding
Select a Step	02 - Resolution	Outstanding
Start / Return to Initiator		
Investigation		
Resolution		
Re-Inspection/Closeout		
Closed-Out		

The action steps allow form participants to progress the workflow after completing a selection.

6. Click **Save**.

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

Step	Title	Configure
00	Start / Return to Initiator	
01	01 - Investigation	

Items: 6

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.

<input type="checkbox"/>	Title	Created By	Created On	Mandatory	Default	Available To
<input checked="" type="checkbox"/>	Civil Review Team	Greg Harrison (Houston Contracting)	20-01-22 03:16 PM	No	No	Project

4. Enter the details for the Distribution List.

*** Title:** Civil Review Team

Make this group available to: Project Company

Set as default group Project Company

Set as mandatory group

Recipients: Workflow *Workflow recipients will take part in the form. For Info recipients can only view it.*

*** Step:** Investigation *Recipients must be assigned to each step of the Workflow.*

*** Display:** All users Roles

Available users: Charles Stinson, Jake Moseby *Select, then add recipient(s) to the step using the arrow.*

Selected users: Andy Lang, Keith Smith *Save each time a user is assigned or after switching between Workflow and For Info.*