QUICK GUIDE

FORM SETUP ESSENTIALS

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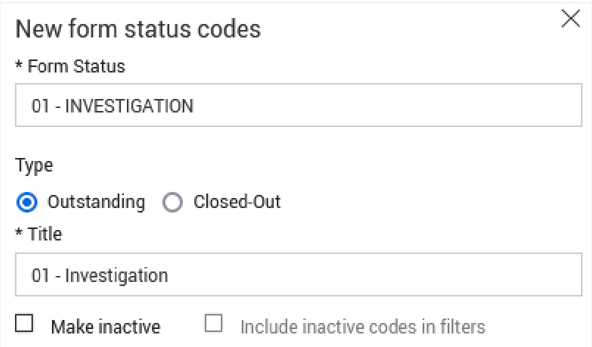
PART 1 – CREATE FORM STATUS CODES

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.

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



NOTE

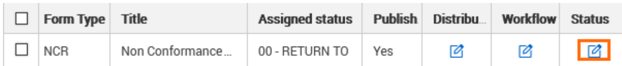
- Use a number in front of the status since statuses are listed in alpha/numeric order.

PART 2 – DEFINE AVAILABLE STATUSES

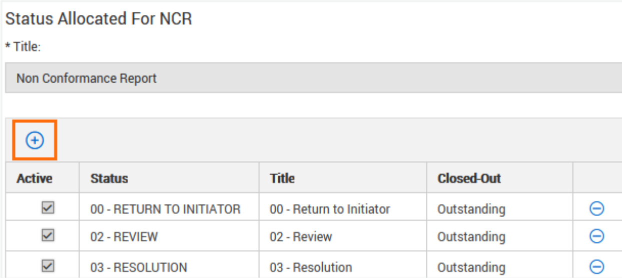
From the Forms Register:

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

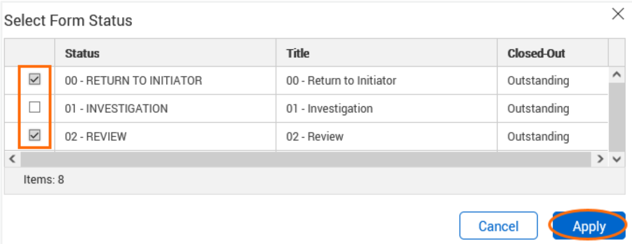
2. Click the **edit icon** of the status you want to edit.



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



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

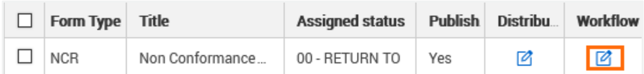


PART 3 – CREATE WORKFLOW STEPS (1)

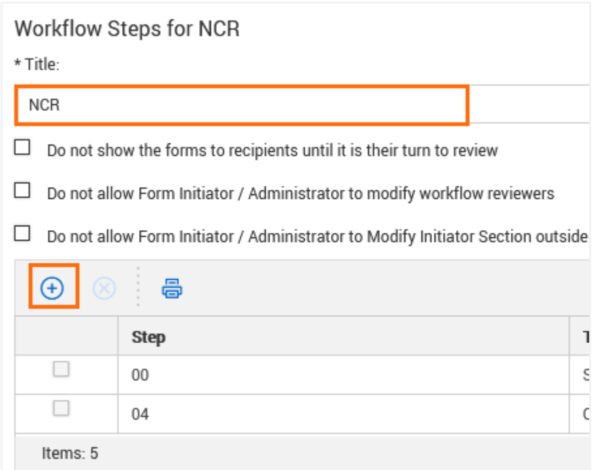
Workflow Steps determine the process by which recipients perform actions relating to each section of the Form. All steps must be created before Next Steps can be allocated.

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.



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



5. Enter in the details for the new Workflow Step

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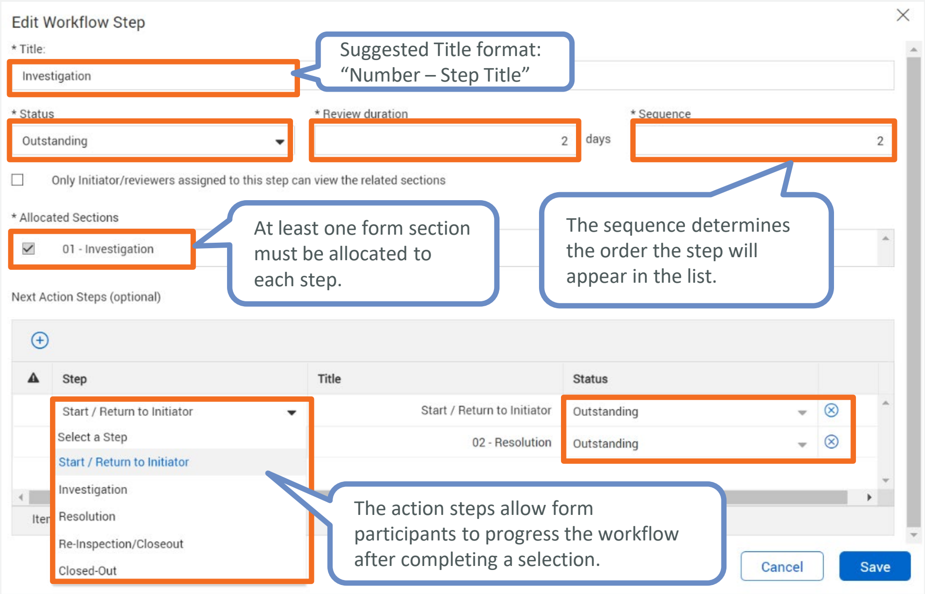
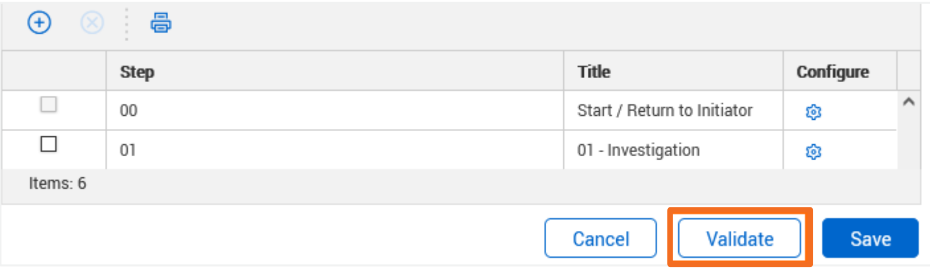
PART 3 – CREATE WORKFLOW STEPS (2)

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



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

	Form Type	Title	Assigned status	Published	Distribution	Workflow	Status
☐	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.

	Title	Created By	Created On	Mandatory	Default	Available To
☐	Civil Review Team	Greg Harrison (Houston Contracting)	20-01-22 03:16 PM	No	No	Project

4. Enter the details for the Distribution List.