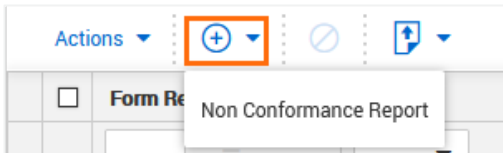


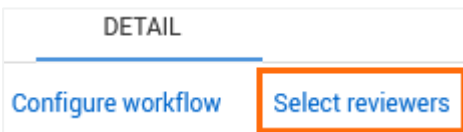
PART 1 – INITIATING A WORKFLOW FORM

From the Forms Register:

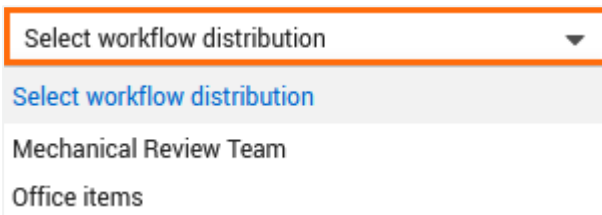
1. Click the **plus icon** and select the Form type you want to initiate.



2. Click **Select reviewers**.



3. Select the required Review Team and click **Save**.



NEED SOME MORE HELP?



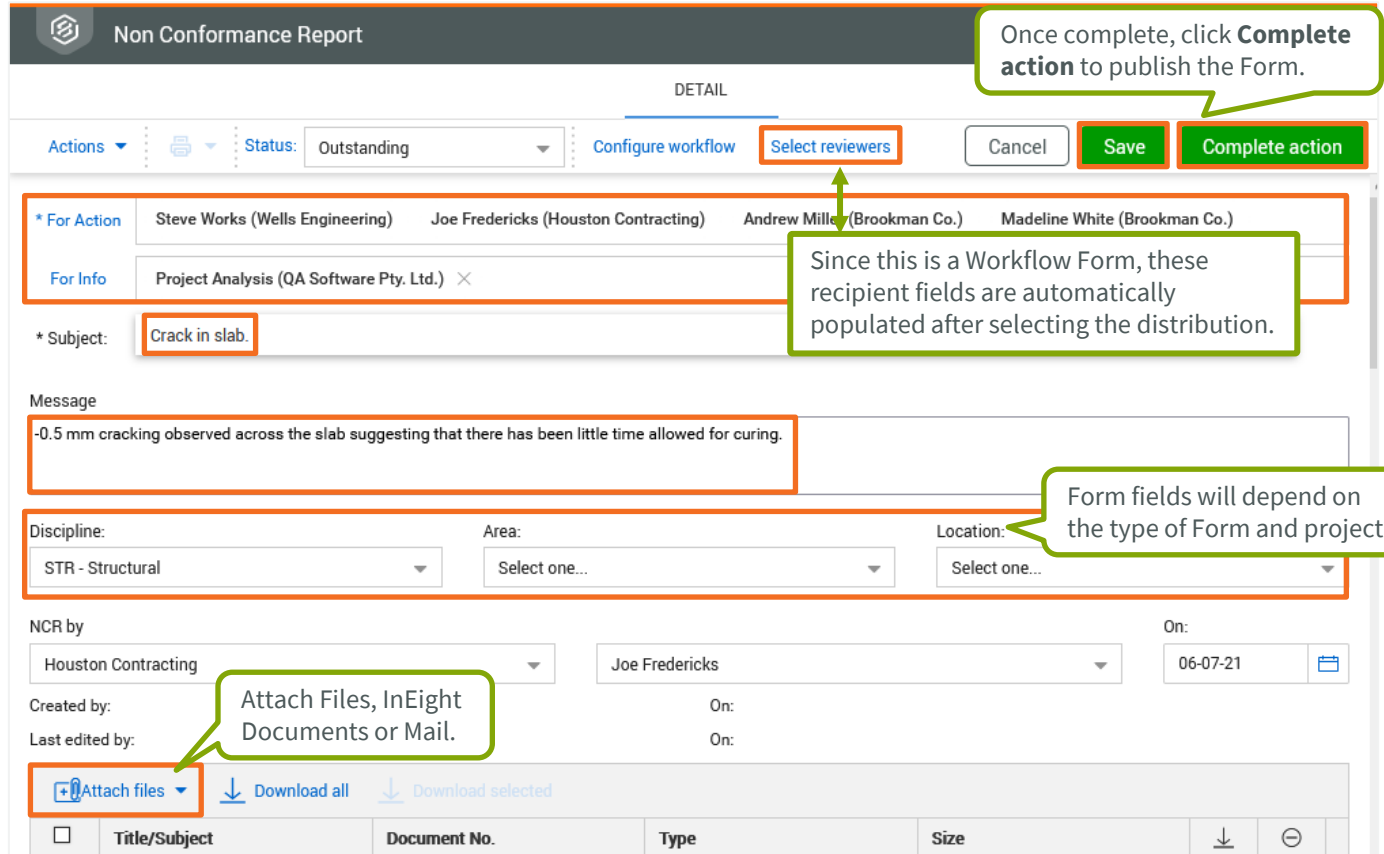
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PART 2 – ENTERING DETAILS IN THE FORM INITIATION SECTION

4. Complete the required details in the Initiator section.



Non Conformance Report

DETAIL

Actions | Status: Outstanding | Configure workflow | **Select reviewers** | Cancel | Save | Complete action

* For Action: Steve Works (Wells Engineering) | Joe Fredericks (Houston Contracting) | Andrew Miller (Brookman Co.) | Madeline White (Brookman Co.)

For Info: Project Analysis (QA Software Pty. Ltd.)

* Subject: Crack in slab.

Message: -0.5 mm cracking observed across the slab suggesting that there has been little time allowed for curing.

Discipline: STR - Structural | Area: Select one... | Location: Select one...

NCR by: Houston Contracting | Joe Fredericks | On: 06-07-21

Created by: | On: | Last edited by: | On: |

Attach files | Download all | Download selected

Title/Subject	Document No.	Type	Size

Callouts:

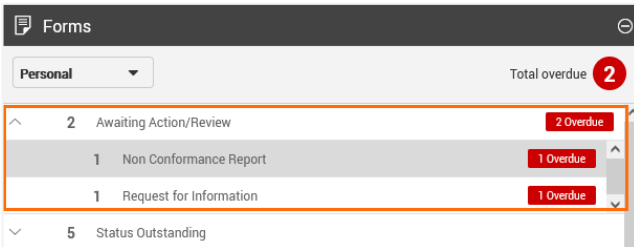
- Once complete, click **Complete action** to publish the Form.
- Since this is a Workflow Form, these recipient fields are automatically populated after selecting the distribution.
- Form fields will depend on the type of Form and project.
- Attach Files, InEight Documents or Mail.

5. Click **Save** to save progress but keep the Form as a draft.
6. Once the Form is ready to go, click **Complete Action** to publish the Form.
7. Form Recipients will then receive a **Form Notification email** that a Form has been issued to them.

PARTICIPATING IN A FORM

After receiving a Form Notification email:

1. Navigate to the **Dashboard**.
2. Expand the **Awaiting Action/Review** link in the Forms widget and click on the required Form type.



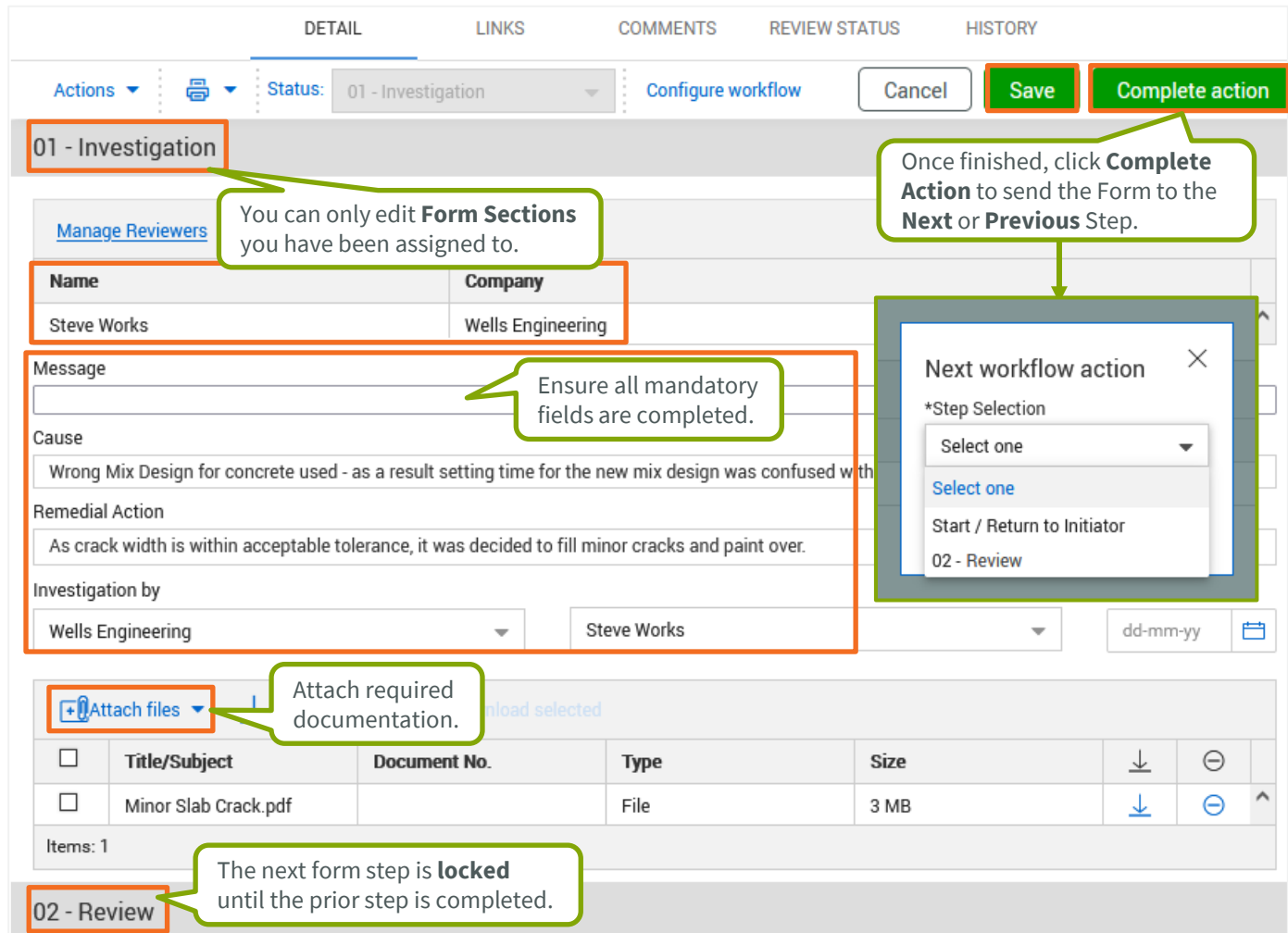
Note: It is also possible to access the form by clicking on the link in the Form Notification email.

3. Click on the **Form Ref** link to open it.

Form Ref	Type	Issued	Subject
HCC-NCR-000001	NCR	07-04-21 02:40 PM	Site barriers too low

4. Read the form details and download any attachments.
5. View the section of the form that has been assigned to you.
6. Complete all mandatory fields.
7. Attach any required documents or links.
8. Click **Complete Action**.
9. Select the **Next** or **Previous** step if prompted.

SAMPLE WORKFLOW FORM



The screenshot shows a form titled '01 - Investigation' with tabs for 'DETAIL', 'LINKS', 'COMMENTS', 'REVIEW STATUS', and 'HISTORY'. The 'Status' is '01 - Investigation'. There are 'Cancel', 'Save', and 'Complete action' buttons. A 'Manage Reviewers' section shows 'Steve Works' from 'Wells Engineering'. The form contains fields for 'Message', 'Cause', 'Remedial Action', and 'Investigation by'. An 'Attach files' section shows a table of attachments, including 'Minor Slab Crack.pdf'. A 'Next workflow action' dialog box is open, showing 'Step Selection' options: 'Select one', 'Start / Return to Initiator', and '02 - Review'. Annotations highlight key features and instructions.

01 - Investigation

You can only edit **Form Sections** you have been assigned to.

Once finished, click **Complete Action** to send the Form to the **Next** or **Previous** Step.

Ensure all mandatory fields are completed.

Attach required documentation.

The next form step is **locked** until the prior step is completed.

02 - Review

Title/Subject	Document No.	Type	Size
Minor Slab Crack.pdf		File	3 MB