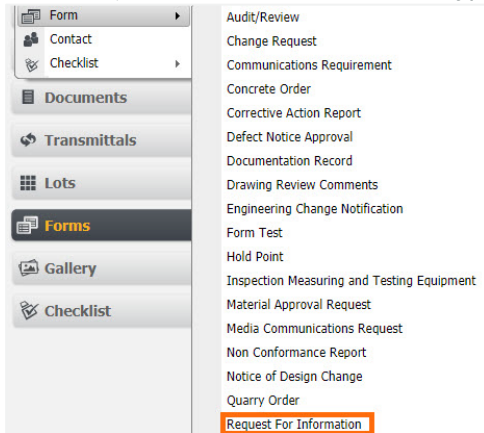
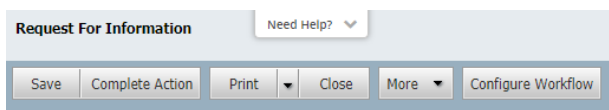


## INITIATING A FORM

1. Click **New**, then Form and choose Form type.



2. Type name(s) into For Action and For Info recipient field(s) or Select Reviewers
3. Enter subject and message details.
4. Complete all other required fields such as Discipline/Location/Area (marked with \*)
5. Select **Attach Files** to include a local file.
6. Click **Save**.
7. Click **Complete Action** and choose the appropriate next action if required (e.g. **Send for Response**).

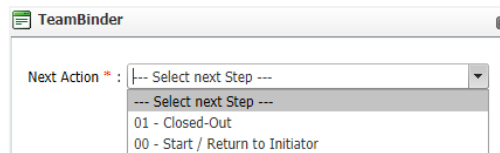


## UPDATING A FORM

1. Select the **Forms** module.
2. Double click to open appropriate Form.
3. Enter the appropriate message and any other information in the enabled section(s).
4. Click **Complete Action** once finished.

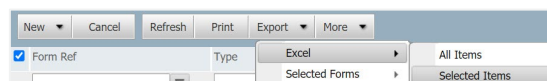
## CLOSING OUT A FORM

1. Select the **Forms** module.
2. Double click to open appropriate Form.
3. Review the updated Form.
4. If complete, select **Complete Action** then select **Closed-Out** as the next Action.



## EXPORTING A FORM REGISTER

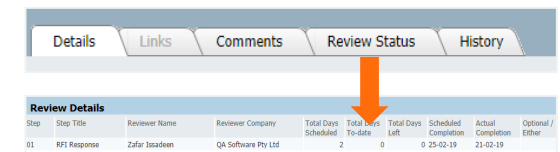
1. Select the Forms in the register you want to include, then click **Export>Export Form Data>Selected Items**.



2. This will export the register to Excel.

## CHECK REVIEW DETAILS AND HISTORY

1. Select the **Forms** module.
2. Double click to open appropriate Form.
3. Select **Review Status** tab to see Review details.



4. Select the **History** tab to review all actions associated with the Form by user.



## EXPORTING A FORM TO PDF

From the Form, select the **More** button then **Export Form Data**.

