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

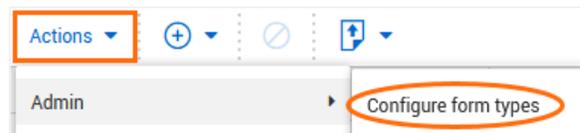☐ Make inactive   ☐ Include inactive codes in filters

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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**.

Actions ▾ | ⊕ ▾ | ⊘ | ⬆ ▾

Admin ▶ | Configure form types

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

☐	Form Type	Title	Assigned status	Publish	Distribu...	Workflow	Status
☐	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	
☑	00 - RETURN TO INITIATOR	00 - Return to Initiator	Outstanding	⊖
☑	02 - REVIEW	02 - Review	Outstanding	⊖
☑	03 - RESOLUTION	03 - Resolution	Outstanding	⊖

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

Select Form Status ✕

	Status	Title	Closed-Out
☑	00 - RETURN TO INITIATOR	00 - Return to Initiator	Outstanding
☐	01 - INVESTIGATION	01 - Investigation	Outstanding
☑	02 - REVIEW	02 - Review	Outstanding

Items: 8

Cancel | **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.

☐	Form Type	Title	Assigned status	Publish	Distribu...	Workflow
☐	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

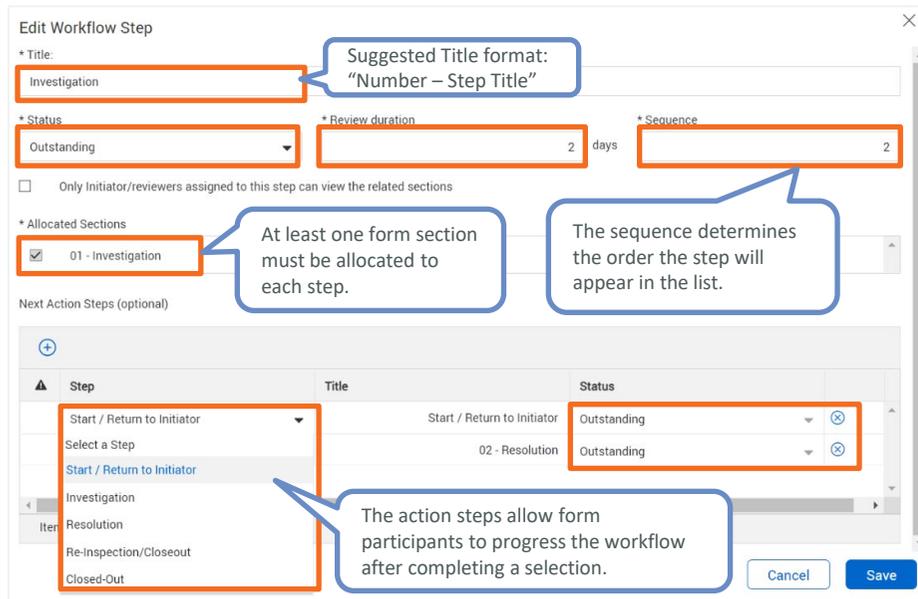☐ Do not allow Form Initiator / Administrator to Modify Initiator Section outside

⊕ | ⊗ | 🖨

☐	Step	T
☐	00	S
☐	04	C

Items: 5

5. Enter in the details for the new Workflow Step

Continued next page ▶

PART 3 – CREATE WORKFLOW STEPS (2)

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

Suggested Title format: "Number – Step Title"

At least one form section must be allocated to each step.

The sequence determines the order the step will appear in the list.

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

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.
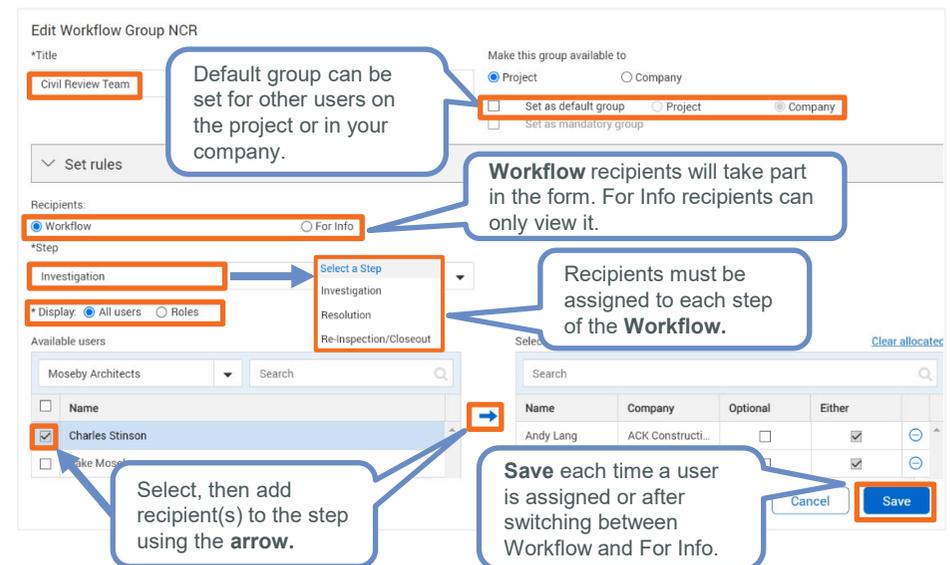
Default group can be set for other users on the project or in your company.

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

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

Select, then add recipient(s) to the step using the **arrow.**

Save each time a user is assigned or after switching between Workflow and For Info.