QUICK GUIDE USING TYPES IN FORMS & TASKS



• TYPES TABLE SET-UP

- 1. Within Compliance or Completions, navigate to your desired module.
- 2. Click **Settings > Types**.
- 3. Click the 🕀 Add icon.
- 4. Type in the name of the first Type and click **Enter**.
- 5. Add additional Types as needed.
- 6. Click Save.

NOTE: As a best practice, Type terminology is relative to the commissioning process. Consider a design like this:

- **Type A** (AITR) qualifies against the Construction Complete (CC) Certificate.
- **Type B** (BITR) looks at the Ready for Commissioning (RFC) Certificate.
- **Type C** (CITR) looks at the Ready For Startup (RFSU) Certificate.

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IDENTIFY TYPE OPTIONS ON A NEW FORM OR TASK

- 1. Within Compliance or Completions, navigate to your desired module.
- 2. In Templates Manager, select **Create New Form** or **Create New Task**.
- 3. Completed the Form/Task Name, Category Association, and check the box for **Types**.
- 4. Select one or more of the Type options from the drop-down.

* Form name		* Organization association
Form Sample		
Description		C-XYZ (RootOrg1) + Future Children Select all Deselect all
* Category association		
Checklist 🗙	×	
Select categories you want to associate to your forms		
✓ Types		
Туре А 🗙 Туре В 🗴 Туре С 🗴	×	
Available on mobile ? 😡		

5. Complete the remaining mandatory fields and click Create.

NOTE: On the Properties tab, if you unselect the Types box, you also remove the Types question and items from it.

Type A	× ×
Type B	×
Type C	×

• IDENTIFY ONE TYPE AS THE DEFAULT

You may elect to have one response appear on the published form/task in the default position. This is optional.

- 1. Select the **Types** question.
- 2. Click on the drop-down arrow.
- 3. Select the default response.
- 4. In the left slide-out window, check the **Default Value** box.

*	✓ Cancel	Save
Details		
* Option text	SECTION	
Type A Type your option Type your option Default value Add supporting text	SECTION HEADER	÷
Logic	* Types Type A	•
Email		

- 5. Complete the rest of the form/task as needed.
- 6. Click **Save** and **Publish**.
 - Within the published form/task, while any type option can be selected from the drop-down, the event or task will show the default like this:

SECTION HEADER		
* Types		
Туре А	•	

QUICK GUIDE TYPES & LEADING LOGIC

LEVERAGING LEADING LOGIC

Based on the Type option created on a form/task, you can also use leading logic to jump straight to specific questions. In this example, we'll also tie leading logic into a Classification.

- 1. Verify you already have some Types set up on the Properties tab of a form/task..
- 2. Also verify you have Classifications set up in the module by going to the Classifications tab.

Module settings > Quality •			
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C Quality Classification 1			

- 3. From the Templates Manager, open your draft form/task, or published form/task in the edit mode.
- 4. Click on the Types question and select the response for which you want to add leading logic.
- 5. Click the Logic drop-down and select Classifications.
- 6. Add another question type, such as a List or Choice question.
- 7. With the left panel open, select the **Logic drop-down**.
- 8. Click on Leading Questions.

Access ~	Select one
Logic ^	O Option1
Defining conditional logic rules allows you to show or hide questions based on another questions response.	Option2
 Leading questions 	Option3
Integration tag (1)	

9. Complete the selection in a similar manner and click **Save**.

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Logic rule	3					×
Add k	yic set					
1	_ Select one 11_ of the following rules match					8
	rpes •	IS	Type A Select a response	•		
						Add logic rule
					Cancel	Save

- 10. If needed, add logic to any additional questions, click **Save** and **Publish** the form/task.
 - As a result, only the questions tied to the leading logic will appear.

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QUICK GUIDE TYPES & THE ALL EVENTS/ALL TASKS PAGE



FILTERING BY TYPES

1. For ease in further refining performed forms or tasks within Compliance or Completions, Select **Types** from within the Column Chooser.

C	tuality > Events -										Global Events/Task	View:	My view		
	8 🍸										🔀 Edit properti	D	-	()	C
	Event title	8	Category	Types	Event date	Event ID	Form name	Project/Org	Reporter	Status					0
	Form Sample_20230424		Checklist	Type C	04-24-2023	20230424000	Form Sample	C-XYZ (RootO	Karen Loftus	Pending					
	Form Sample_20230424		Checklist	Type B	04-24-2023	20230424000	Form Sample	C-XYZ (RootO	Karen Loftus	Pending	Attachmer	it.			
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- 2. Click on the **Query Builder** icon.
- 3. Click the 🕂 Add icon.
- 4. In the Column field, select **Type**.
- 5. Select your desired Operator.
- 6. In the Value field, type is the desired term from within your Types options.

				Event title	0	Category	Types	Event date	Event ID	Form name	Project/Org	Reporter	Status
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				Types and Integrated Li		Checklist	Type B	04-13-2023	20230413000	Types and Integra	C-XYZ (RootO	Michael Shaw	Pen

- 7. Click Apply.
 - The abbreviated list of events or tasks will appear.

SAVE THE QUERY

- 1. With the abbreviated list of tasks or events shown, click **Save Query**.
- 2. Type in a name for the query and click **Save**.

Save	Query	······	B 01-20	×
	Туре В			
		Cancel	Save	

• You may also choose to use the **Edit**, **Delete**, or **Share** functions, as well as the **Update Results** button as needed.

				Event title	 Category	Types 👘	Event date	Event ID	Form name	Project/Org	Reporter	Status 🗌
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