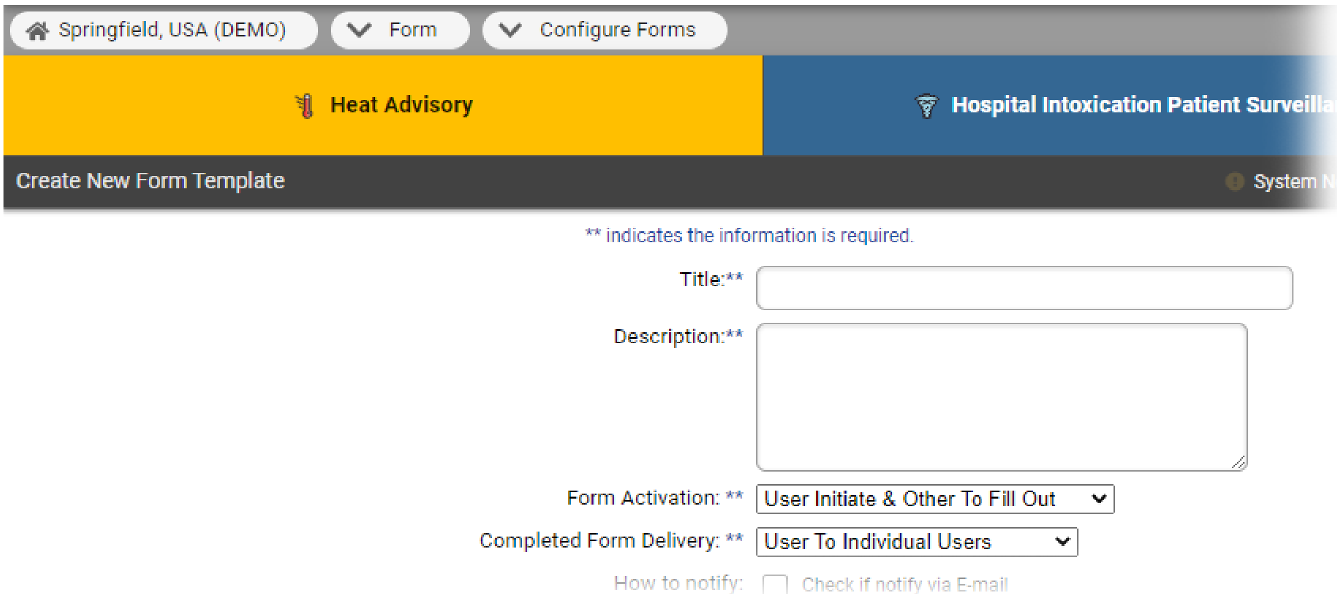
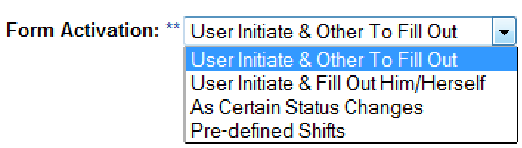
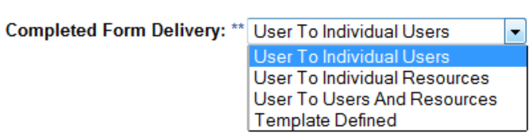
Create a Form Template

If you have the appropriate rights, you can create new form templates and questionnaires. As part of this process, you specify the users and resources that can activate the form and complete it. You also specify the users and/or resources that are to receive the completed form.



The *Form Configuration* page shows the title and description of each form. It also indicates whether the form is configured and/or active. The workflow for creating your form differs based on the options you choose in the **Form Activation** and **Completed Form Delivery** fields. The procedures below coincide with these options.





Note the following about form creation:

- Refer to About Form Configuration for detailed field definitions.
- In these procedures, when you need to specify users and/or resources who are responsible for the form, you can use the search fields toward the top of the page to search by role, resource type, and/or user ID.
- Typically, a form is completed by a user or a resource, not both. If you specify both, the system delivers it to both. This means the user may receive duplicate forms—one directed to the user and a second to the user's resource.

To activate for another user to complete (User initiate & Other To Fill Out)

Use this procedure to configure forms that are activated when a user initiates the form and sends it to be completed by someone else.

1. In the main menu, click **Form** and then click **Configure Forms**. The *Form Configuration* page opens.
2. Click **Create New Form Template**. The *Create New Form Template* page opens.
3. For **Title**, enter the name of the form template.
4. For **Description**, enter details about when and/or why to use this form template.
5. In the **Form Activation** list, select **User Initiate & Other To Fill Out**.
6. In the **Completed Form Delivery** list, select how you want the completed form to be delivered.
    - User To Individual Users
    - User To Individual Resources
    - User To Users and Resources
    - Template Defined
7. For **How to notify**, select the checkboxes for the completed form notification methods.
8. In the **Notification Sound** list, select the sound.
9. For **Mandatory**, select the checkbox if you want form completion to be required.
10. For **Active**, select the checkbox if you want the form to be immediately available.
11. Click **Next**. The *Users to Fill Out Form* page opens.
12. Select the users responsible for completing the form.
13. Click **Next**. The *Resources to Fill Form* page opens.
14. Select the resources responsible for completing the form.
15. Click **Next**.
16. Take one of these actions.

If the...	Then...
Form Security Settings page opens,	a. Select the settings for the appropriate users: **Activate Form** and/or **Run Report**. b. Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.
Users to Receive Completed Form page opens,	a. Select one or more recipients for the completed form. b. Click **Next**. The *Form Security Settings* page opens. c. Select the settings for the appropriate users: **Activate Form** and/or **Run Report**. d. Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.

To activate and complete the form yourself (User initiate & Fill Out Him/Herself)

Use this procedure to configure forms that a single user activates and completes. With this option, the activator can choose to receive confirmation that the form was received and acknowledged (**Read Receipt** option).

The workflow differs depending on the option you select for **Completed Form Delivery**.

1. In the main menu, click **Form** and then click **Configure Forms**. The *Form Configuration* page opens.
2. Click **Create New Form Template**. The *Create New Form Template* page opens.
3. For **Title**, enter the name of the form template.
4. For **Description**, enter details about when and/or why to use this form template.
5. In the **Form Activation** list, select **User Initiate & Fill Out Him/Herself**.
6. In the **Completed Form Delivery** list, select how you want the completed form to be delivered.
    - User To Individual Users
    - User To Individual Resources
    - User To Users and Resources
    - Template Defined
7. For **How to notify**, select the checkboxes for the completed form notification methods.
8. If you chose to deliver the form to individual users or individual resources, select or clear the **Read Receipt** check box, as appropriate.
9. In the **Notification Sound** list, select the sound.
10. For **Mandatory**, select the checkbox if you want form completion to be required.
11. For **Active**, select the checkbox if you want the form to be immediately available.
12. Click **Next**.
13. According to your selection on the Completed Form Delivery list, take one of these actions.

If you selected...	Then...
User To Individual Users	The *Define Completed Form Delivery Choices - Users* page opens. a. Select **All Users** or clear **All Users** and then select individual users. b. Click **Next**. The *Form Security Settings* page opens. c. Select the settings for the appropriate users: **Activate Form** and/or **Run Report**. d. Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.

User To Individual Resources	The *Define Completed Form Delivery Choices - Resources* page opens. *a.* Select **All Resources** or clear **All Resources** and then select individual resources. *b.* Click **Next**. The *Form Security Settings* page opens. *c.* Select the settings for the appropriate users: **Activate Form** and/or **Run Report**. *d.* Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.
User To Users and Resources	The *Define Completed Form Delivery Choices - Users* page opens. *a.* Select **All Users** or clear **All Users** and then select individual users. *b.* Click **Next**. The *Define Completed Form Delivery Choices - Resources* page opens. *c.* Select resources by doing one of the following: select **All Resources** or clear **All Resources** and then select individual resources. *d.* Click **Next**. The *Form Security Settings* page opens. *e.* Select the settings for the appropriate users: **Activate Form** and/or **Run Report**. *f.* Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.
Template Defined	The *Users to Receive Completed Form* page opens. *a.* Select one or more recipients for the completed form. *b.* Click **Next**. The *Form Security Settings* page opens. *c.* Select the settings for the appropriate users: **Activate Form** and/or **Run Report**. *d.* Click **Save**. The *Form Configuration* page re-opens. Your new form appears in the list.

To make the system activate the form upon a status change (As Certain Status Changes)

Use this procedure to configure forms that the system activates when the specified status type is changed to a particular value.

1. In the main menu, click **Form** and then click **Configure Forms**. The *Form Configuration* page opens.
2. Click **Create New Form Template**. The *Create New Form Template* page opens.
3. For **Title**, enter the name of the form template.
4. For **Description**, enter details about when and/or why to use this form template.
5. In **Form Activation**, select **As Certain Status Changes**.
   Note: The **Completed Form Delivery** field defaults to **Template Defined** and you cannot change it for this type of form activation.
6. For **How to notify**, select the checkboxes for the completed form notification methods.
7. In the **Notification Sound** list, select the sound.
8. For **Mandatory**, select the checkbox if you want form completion to be required.
9. For **Active**, select the checkbox if you want the form to be immediately available.
10. Click **Next**. The *Form Activation Status Type* page opens.
11. Select the **Status Type**.
12. Click the **Select Status Type**. The *Form - Status Change Setting* or *Set Numeric Status* page opens.

    Note: The options that appear in the page depend on the status type you selected on the Form Activation Status Type page.
13. Select one or more changes that will activate the form, such as:
    - Whenever status change (select one or more changes).
    - When to send (status is above or below a specified) value.
14. Click **Save Configuration**. The *Users to Receive Completed Form* page opens.
15. Select the users who are to receive the completed form.
16. Click **Next**. The *Form Security Settings* page opens.
17. Select the **Run Report** setting for the appropriate users.
18. Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.

To make the system activate the form automatically at specified times (Pre-defined Shifts)

Use this procedure to configure forms that activate at specific times of the day or during specific shifts.

1. In the main menu, click **Form** and then click **Configure Forms**. The *Form Configuration* page opens.
2. Click **Create New Form Template**. The *Create New Form Template* page opens.
3. For **Title**, enter the name of the form template.
4. For **Description**, enter details about when and/or why to use this form template.
5. In **Form Activation**, select **Pre-defined Shifts**.
   Note: The **Completed Form Delivery** field shows the value **Template Defined**. You cannot change the value for this type of form activation.
6. For **How to notify**, select the checkboxes for the completed form notification methods.
7. In the **Notification Sound** list, select the sound.
8. For **Mandatory**, select the checkbox if you want form completion to be required.
9. For **Active**, select the checkbox if you want the form to be immediately available.
10. Click **Next**. The *Form Shift Delivery Options* page opens.
11. For **Template to be delivered every**, select the shifts during which the form is to be delivered.
12. Specify a time for each shift you selected.

    ***Tip**: Time is in the 24-hour format. For example, for 3:30 PM, select 15 and 30.*
13. Click **Next**. The *Users to Fill Out Form* page opens.
14. Select the users who are responsible for completing the form.
15. Click **Next**. The *Resources to Fill Form* page opens.
16. Select the resources that are responsible for completing the form.
17. Click **Next**. The *Users to Receive Completed Form* page opens.

18. Select one or more users to which the completed form will be delivered.
19. Click **Next**. The *Form Security Settings* page opens.
20. Select the **Run Report** setting for the appropriate users.
21. Click **Save**. The *Form Configuration* page opens. Your new form appears in the list.