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 \bigcirc 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-

* Form name	* Organization association
Form Sample	
Description	C-XYZ (RootOrg1) Future Children Select 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.

/ Types			
	Type A	× ×	Â
	Туре В	×	
	Type C	×	
			Ŧ

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**

	*	1 Cancel	Sava
Details	^	7 Cancer	Save
* Option text		SECTION	
Type A Type your option Default value		SECTION HEADER	
Add supporting text			÷
Logic	~	* Types Type A	٦
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		
Type A		Ŧ

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

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- 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.

A	Access		Select one
L	ogic	^	O Option1
×	Defining conditional logic rules allows you to show hide questions based on another questions respon		O Option2
•) Leading questions		O Option3
In	tegration tag (1)		

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

Log	rules				×
C	Add logic set				
1	SHOW Select one hen <u>ALL</u> of the following rules match				8
	Types • Select a question	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.

ION HEADER					
* Types					
					•
Type A					
Type B					
Type C					
Select one (Leading Question Typ	e A)				
Option1	SHOW Select one (Leading Question Type A)				
O Option2	And ALL of the following rules match				
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	Select a question		Select a response		@ M
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QUICK GUIDE TYPES & THE ALL EVENTS/TASKS PAGES

• FILTERING BY TYPES

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

(Quality > Events -										Global Events/Tasks View; My view						
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	Event title	8	Category	Types	Event date	Event ID	Form name	Project/Org	Reporter	Status					α		
	Form Sample_20230424		Checklist	Type C	04-24-2023	20230424000	Form Sample	C-XYZ (RootO	Karen Loftus	Pending							
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- 2. Click on the Query Builder icon.
- 3. Click the \bigcirc 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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- 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.

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

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