

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-

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.

◆ 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**

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:

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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.

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**.

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

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.

Event title	#	Category	Types	Event date	Event ID	Form name	Project/Org	Reporter	Status
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
Types and Integrated Li...		Checklist	Type A	04-18-2023	20230418000...	Types and Integra...	C-XYZ (RootO...	Karen Loftus	Pending
Type Form button Exam...		Checklist	Type B	04-18-2023	20230418000...	Type Form button	C-XYZ (RootO...	Karen Loftus	Pending
Type Form Button KI_2...		Checklist	Type A	04-18-2023	20230418000...	Type Form Button	C-XYZ (RootO...	Karen Loftus	Pending
Type Form Button KI_2...		Checklist	Type B	04-18-2023	20230418000...	Type Form Button	C-XYZ (RootO...	Karen Loftus	Pending
Types and Integrated Li...		Checklist	Type A	04-18-2023	20230418000...	Types and Integra...	C-XYZ (RootO...	Karen Loftus	Pending

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.

Query Builder

Column: Types Operator: Is equal to Value: Type B

Reset Cancel Save Query Save Query As Apply

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

Type B

Cancel Save

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

Queries

My Queries

Update Results

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