

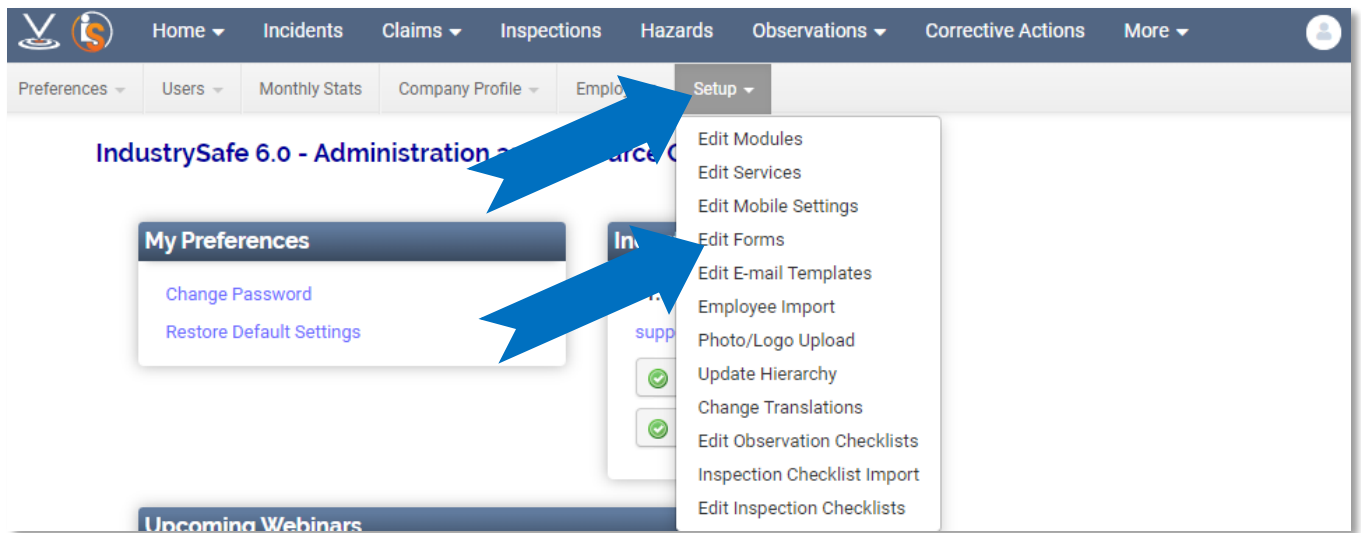
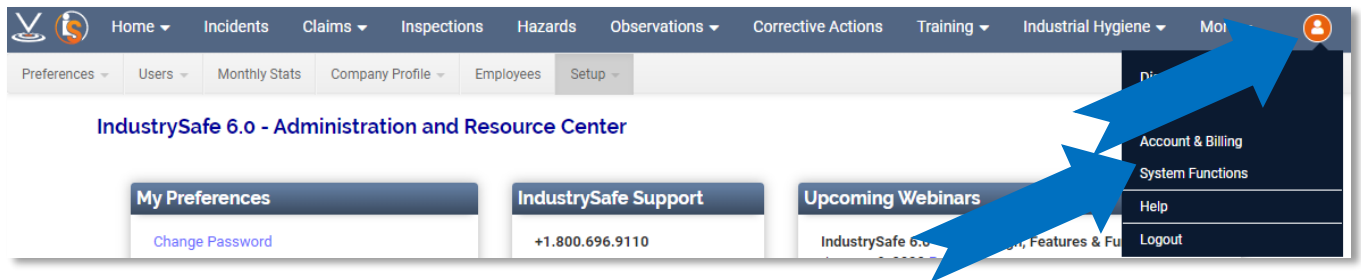
IndustrySafe Form Editor - Advanced Features

The Form Editor in IndustrySafe provides a way for administrators to configure the recording forms on your site to meet your organization’s specific needs.

The Form Editor allows for fields and entire sections to be moved anywhere throughout the form. In addition, a form can be formatted for two columns, fields and sections can be added, deleted or renamed, and tool tips can be added to help explain fields to your end users.

1 Access Form Editor

1.1 To access the Form Editor, click on the **Account Silhouette** located in the top right-hand corner of the screen and a drop-down menu will appear. Click the **System Functions** wrench. A secondary grey navigation bar will appear. Click on **Setup**, and choose **Edit Forms**. Please note that only administrators with access to System Functions will be able to access the Form Editor.



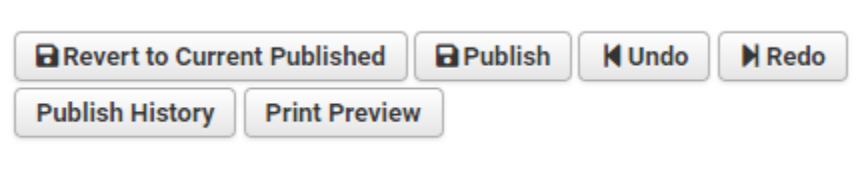
1.2 Next, choose the recording form you want to edit:

The screenshot shows a configuration panel titled "Edit Forms". At the top left is a "Save" button with a floppy disk icon. Below this are two dropdown menus: "Recording Form*" and "Section*", both with downward-pointing arrows. At the bottom left, there is another "Save" button with a floppy disk icon.

After a form is selected, IndustrySafe will display a configuration panel that will allow you to modify the form. The configuration panel includes a "What You See is What You Get" (WYSIWYG) display of the form called the Form Layout (i.e. the form is displayed how it will look to the end users who access the form). Several key page elements allow you to modify the order and content of the form, including Publish Elements and the Field and Features Panels. Each of these page elements and form features are described below.

2 Publish Elements

This section of the guide explains the various elements that allow you to track and publish your form configurations. The publish elements bar is located at the top of the Form Editor page.



2.1 Save

The form is saved automatically anytime you make a change. You will notice the "Last Saved By" in the upper right update to your username at the date and time you made the change.

2.2 Revert to Current Published

Revert to Current Published will display the previously published version of the recording form and undo any changes saved during your current session.

2.3 Publish

The **Publish** function will apply the current state of the form to your IndustrySafe site.

2.4 Undo/Redo

The **Undo** function will reverse the last action performed. The **Redo** function will reverse the last undo action.

2.5 Publish History

Publish History will display the users that have published the form and the date and time of each publish.

| Publish History ✕ | |
|--|-------------------------|
| Publisher | Date |
| IndustrySafe Support | 12/11/2019 10:58 PM EST |
| CJ Lambert | 12/11/2019 09:51 PM EST |
| Karolina Kiselyova | 11/26/2019 07:43 AM EST |
| IndustrySafe Support | 11/20/2019 02:59 PM EST |
| CJ Lambert | 09/04/2019 10:14 AM EST |
| IndustrySafe Support | 08/22/2019 03:43 PM EST |
| CJ Lambert | 08/19/2019 04:58 PM EST |

2.6 Print Preview

Print Preview will generate a PDF that will allow you to preview your edits prior to publishing your changes.

3 Field and Features Panels

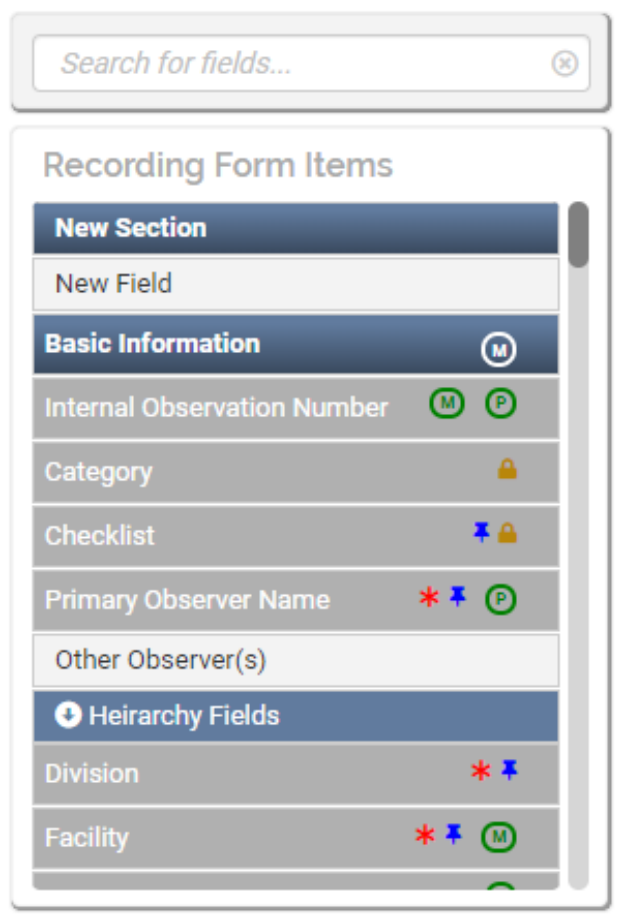
3.1 The Field Panel provides you with a list of standard available fields and sections to add to your form and is located on the top left of the Form Editor page. In addition, new fields and sections can also be added to your form. To find a field, you may either scroll through the list or use the search box.

The Features Panel, located below the Field Panel, includes a list of advanced features including action items and attachments that you can add and remove from your form.

3.2 Field Panel

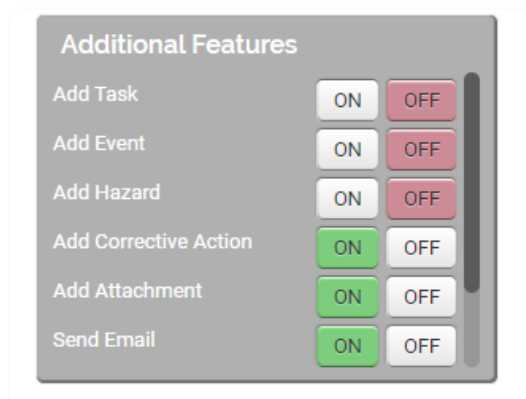
On the left of the Form Editor page, there is a list of all of the fields for your form. Fields that are already displayed on the form are shaded dark grey while available fields that can be added to the form are shaded light grey. You can use the scroll bar to find the field you want or you can search for it using the search bar. Then you can select the field and drag it into the section on the WYSIWYG Form Layout where you want the field displayed. New fields or sections can

also be created from the Field List by selecting the New Section or New Field items from the list and dragging it to the Form Layout.



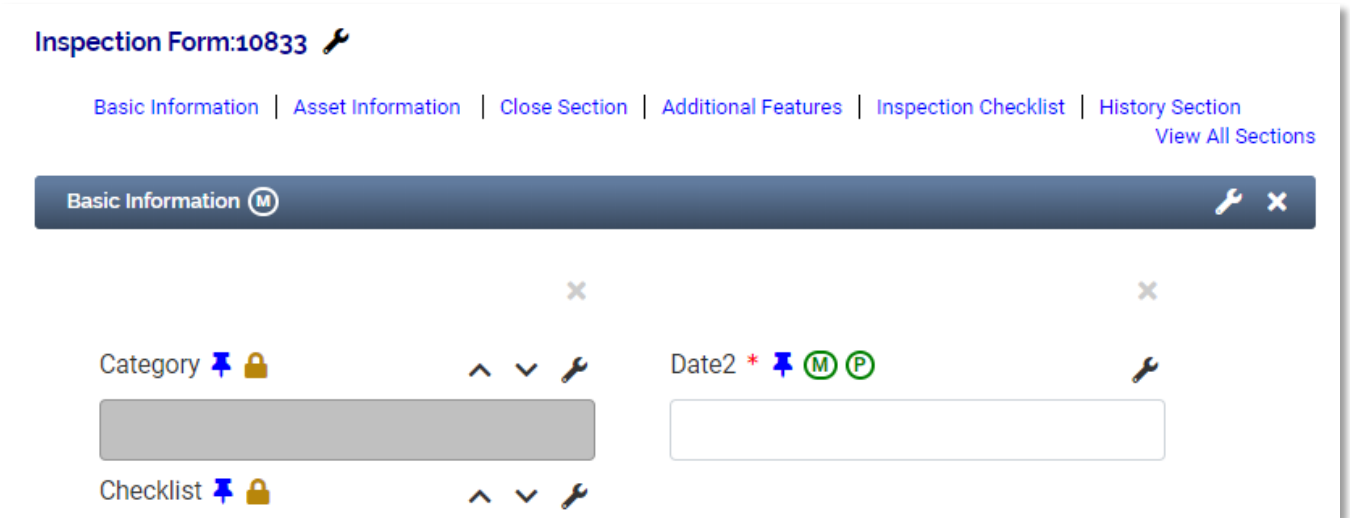
3.3 Features Panel

The Features Panel allows an administrator to determine if end users can send emails or add corrective actions or attachments to a recording form. You can also turn the Close and History sections off from the Features Panel.



4 Form Layout

4.1 The What You See is What You Get (WYSIWYG) Form Layout displays the form how it will display to the end user. The Form Layout displays the form title, lists all of the sections created, and provides an option to view the entire form at once. Key components of this form layout can be modified by dragging and dropping, and by using the edit form configuration tools explained below.











5 Configuring a Form

The Form Editor allows an administrator to configure a recording form for their organization's needs. You can add, rename, reorder, and remove fields and sections with the Form Editor. You can even rename the recording form.

5.1 Symbol Key/Definitions

Fields and sections have symbols that display next to them on the form and they provide you with information about the field and/or edit capabilities for the applicable field or form. Symbol key definitions are displayed below.

-  - The field will be required when an end user saves the recording form
-  - The field will appear on the Public Web Form
-  - The field cannot be removed from the recording form
-  - The field is Read Only (the information within the field can only be viewed, not changed)
-  - The field, section, and form areas can be edited by using this feature
-  - The field, section, or column will be deleted when this feature is used
-  - This feature will add a column to a section
-  - This field will appear on the mobile app

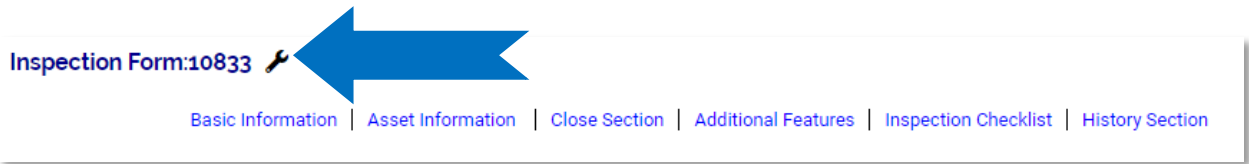
5.2 Section Navigation Links



The top of the Form Layout displays sections that are currently on the form and allows the administrator to select the section they want to view or edit. There is also the **View All Sections** option, which will display the entire form with all of the sections.

5.3 Rename Form

By selecting the **wrench** next to the form name, a modal will open allowing you to modify the name of the form.



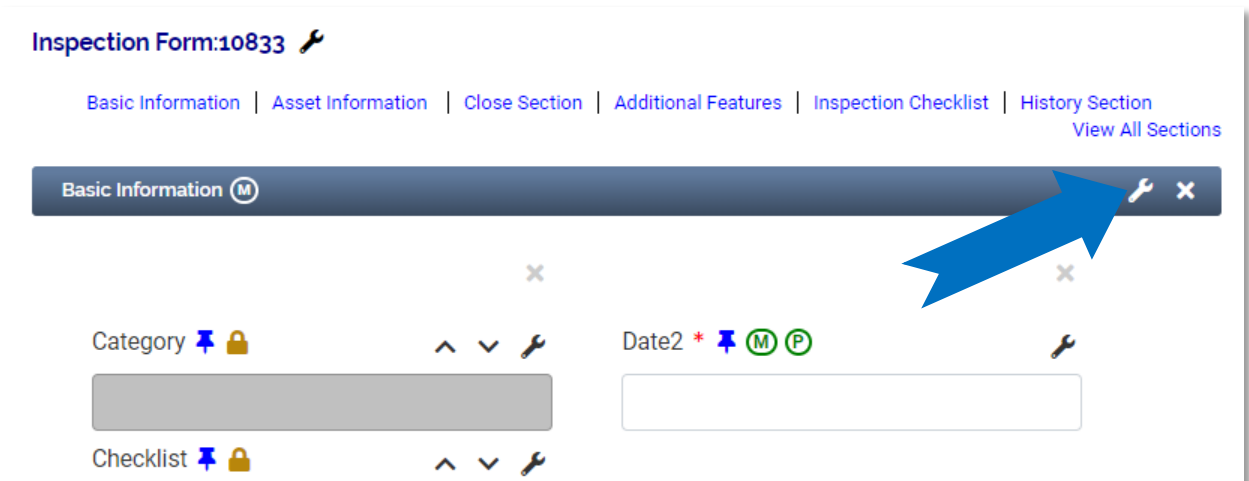
5.4 Switch to a Single Column Layout

The modal that allows you to modify the name of your form also contains a **Change layout to a Single Column Format** button that will allow you to switch the layout of your form back to a single column design.



5.5 Rename Section

Each section can be identified by the blue header with the white text. To edit the name of a section, use the wrench on the blue header. Once you select the **wrench**, a modal will open allowing you to modify the name of the section



Panel Properties [Close]

Panel Name

Mobile

[OK] [Cancel]

5.6 Adding Standard Fields and Sections

The Field Panel on the left side of the screen displays the fields and sections available to add. To add a standard field, drag the field from the Field Panel to the form on the right and place the field in the appropriate order within the appropriate section. To add a standard section, drag the section from the Field Panel area to the form on the right. Where you place the field and/or section on the Form Layout is where the field and section will display when end users access the form.

Inspection Form:10833 [Edit]

Basic Information | Asset Information | Close Section | Additional Features | Inspection Checklist | History Section [View All Sections](#)

Recording Form Items

- New Section
- New Field
- Basic Information** [Add]
- InspectionGroup Fields
- Category [Add] [Lock]
- Checklist [Add] [Lock]
- Inspection Subpart [Add] [Lock]
- Inspection Topic [Add] [Lock]
- Heirarchy Fields
- Division [Add] [Lock]

Basic Information [Add] [Close]

Category [Add] [Lock] [Up] [Down] [Edit]

Checklist [Add] [Lock] [Up] [Down] [Edit]

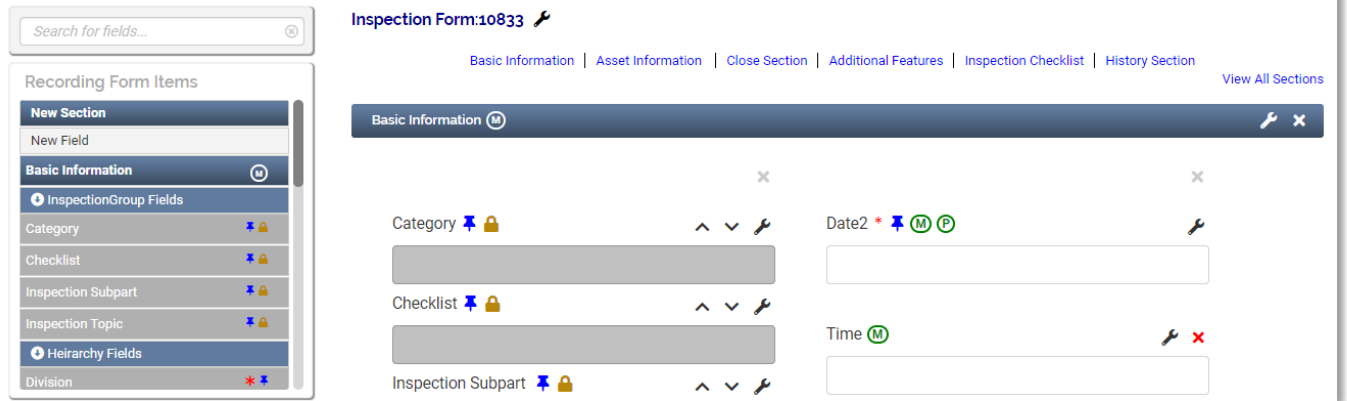
Inspection Subpart [Add] [Lock] [Up] [Down] [Edit]

Date2 * [Add] [Lock] [M] [P] [Edit]

Time [M] [Edit] [Close]

5.7 Adding New Fields and Sections

To add a new field, drag the New Field item from the Field Panel to the Form Layout on the right. Then choose the appropriate Field Type for the new field.

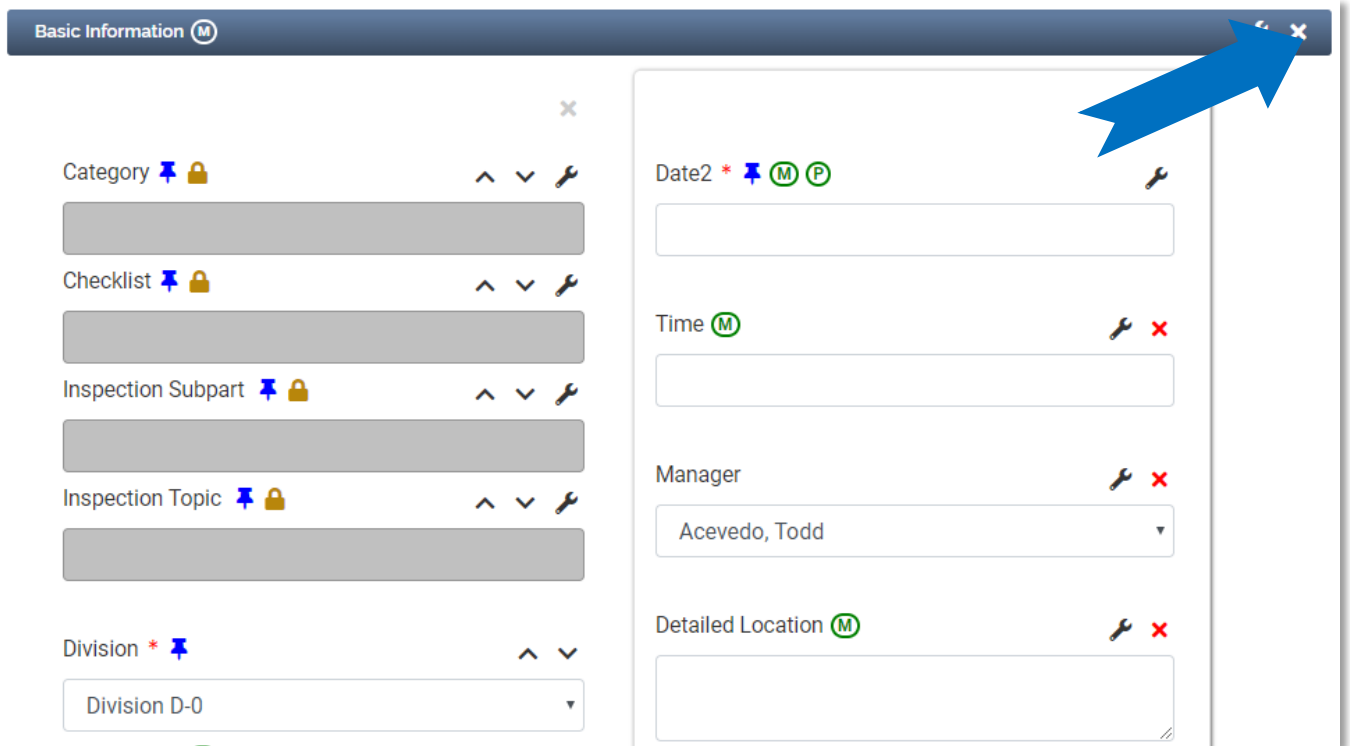


Once you add the field to the form, you may edit the field further by renaming it, providing a tooltip for end users, marking the field as required, and (where applicable) choosing to have the field appear on your Public Web Form.

To add a new section, drag the New Section item from the Field Panel to the form on the right. Then you can rename the section, add fields to the section, and reorder the section.

5.8 Removing Fields and Sections

To remove a field, select the red **x** next to the field name. To remove a section, select the white **x** along the section heading.



5.9 Reordering Fields and Sections

To reorder a field, drag the field to the location on the Form Layout you would like it to appear. If you want the field in a different section, select View All Sections, and then drag the field to the section of your choice.

To reorder a section, select View All Sections, and then drag the blue section heading to the new area you would like the section to appear on the form.

5.10 Grouped Fields

Some fields are grouped together on the form. You can still move the group of fields throughout the form and perform other functions on each field including renaming each field, entering a tooltip for each field, determining if each field is required, and determining (where applicable) if the group of fields should show on the Public Web Form. The fields cannot be separated from each other, but are not required to be on the form unless they have the blue pin next to their field name.

6 Editing Field Properties

6.1 Depending on the field type, each field has several properties that you can modify. Select the wrench icon next to the field to display the Field Properties modal. Depending on the field type, the Field Properties modal will display several options that allow you to modify the field. Each of these options is described below.

6.2 Field Label

This area allows you to change the name of a field.

6.3 Tool Tip

This area allows you to provide additional detail about the field. The tool tip will be visible to the end user when they hover over the field label on the form.

6.4 Field Type

You cannot change a field type once a field has been created. When you add a new field (See Adding a New Field, section 5.7 above) you may select the field type from the list of options below.

- Currency – Allows users to enter a currency amount. IndustrySafe automatically formats the field with a dollar sign and only accepts numerical values in this field.
- Date – Allows users to enter a date manually or pick a date from a popup calendar.
- Dropdown – Allows users to select a single value from a list that you define. The dropdown values can be edited by selecting the hyperlink labeled “Dropdown.” For more information on editing dropdowns, please see page 13.
- Employee Search – Allows for an end user to start typing an employee’s name and IndustrySafe will search for all employee records that meet the criteria.
- Hyperlink – Allows users to click on the field, and open a URL in a separate browser window for a URL that you define. The URL must be a valid web address with no more than 2,000 characters.

- Note – Allows users to view a read-only note on the form based on a note description you provide. Notes can be any combination of letters, numbers, or symbols up to 1,000 characters.
- Number - Allows users to enter any number. This is treated as a real number and any leading zeros are removed.
- Text – Allows users to enter any combination of letters, numbers, or symbols up to 255 characters in a single line text box.
- Text Area – Allows users to enter any combination of letters, numbers, or symbols up to 4,000 characters in a multi-line text box.
- Time – Depending on your global setting, this field type allows users to enter a time in either AM/PM format or 24-Hour Time.

6.5 Required

This field property allows you to indicate whether or not the field is required to be answered by the end user.

6.6 Public Form

This field property allows you to indicate whether the field is hidden or displayed on your organization's Public Web Form, if applicable.

6.7 Advance Settings

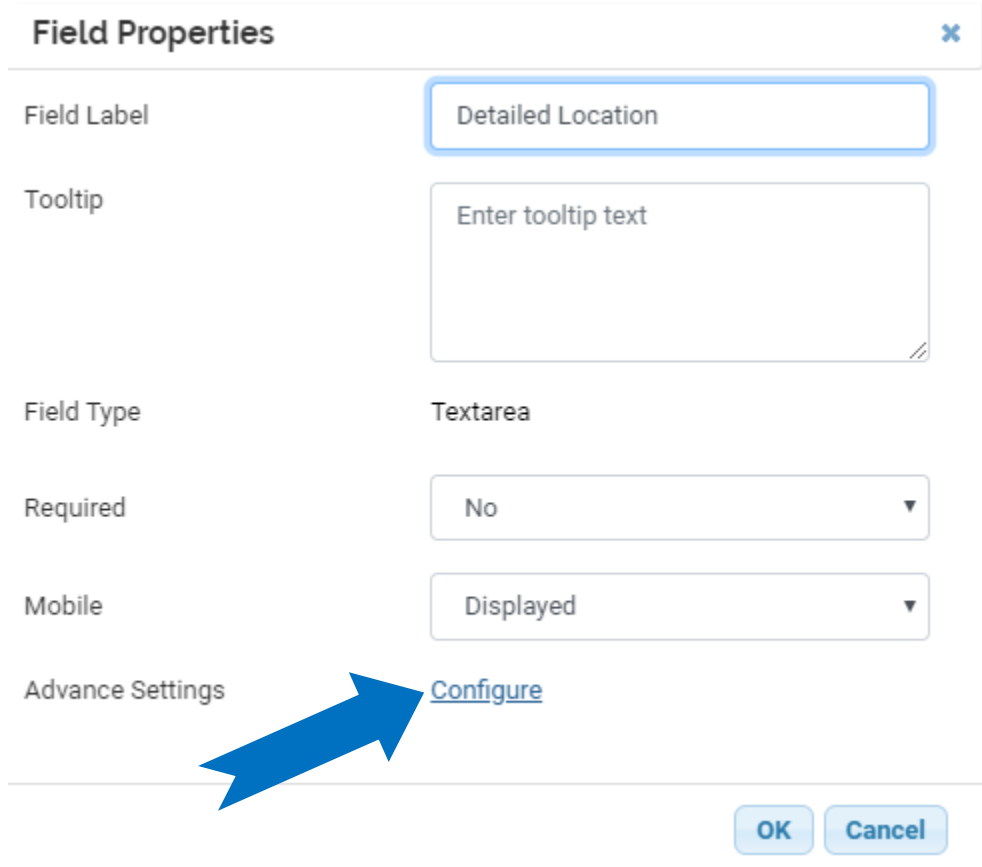
This field property allows you to indicate if the field should be hidden and displayed on the form based on the value of another field. If the advance setting property is not configured or is left blank, the field will always appear on the form. However, if you want the field to only appear on the form based on how a different (controlling) field is answered, that can be setup through this property. You will have the ability to choose a controlling field for the field selected. The controlling field controls when the selected field will display. Administrators can then choose via checkbox the values in the controlling field drop down that will display the selected field.

For example, suppose you are setting up the Hazard Recording Form and have a value in the Type of Hazard drop down list for "Other". When an end user selects "Other" for the Type of Hazard, you want a text field to appear where the user is required to explain the type of hazard.

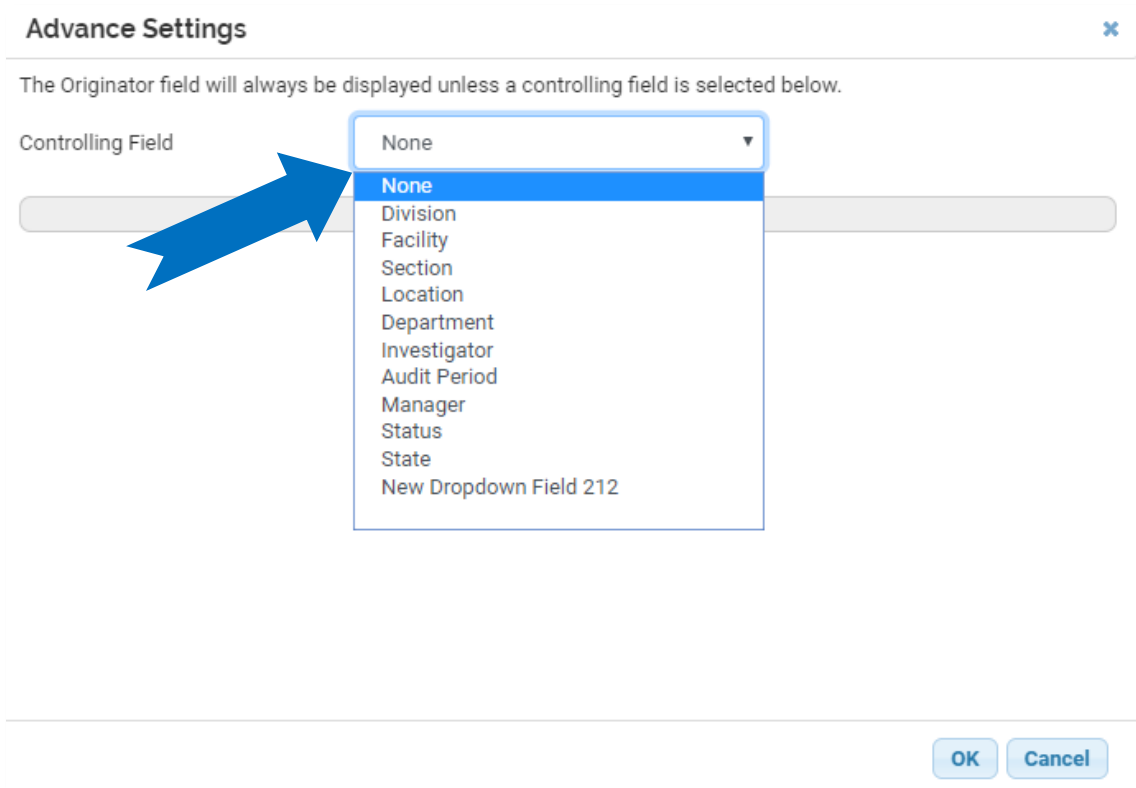
For this example, you would access the properties for the conditional fields with the **wrench** next to "Detailed Location":



From there, select **Configure** next to **Advance Settings**:



From this screen, you can choose the controlling field and values:



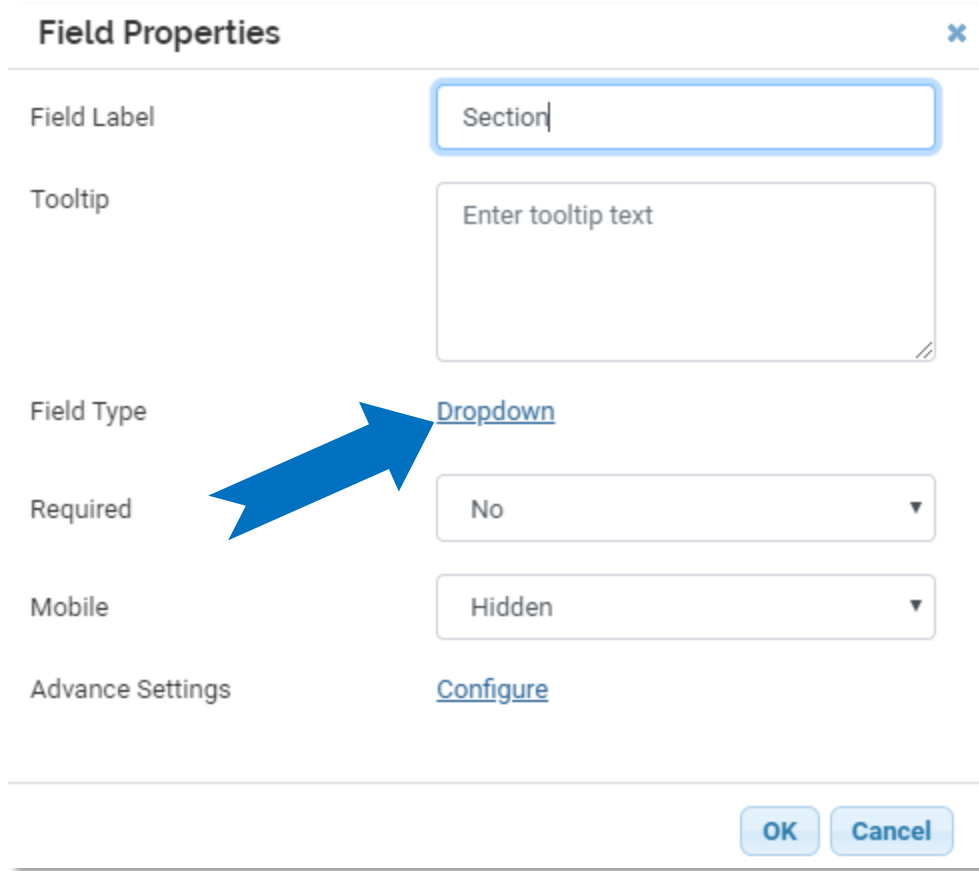
Now when **Other** is selected for the Type of Hazard, the Explain the Type of Hazard field will appear on the form.

6.7 Edit Dropdown Values

To edit the dropdown values of a field, access the properties of the field with the **wrench**:



From there select the **Dropdown** hyperlink next to Field Type:

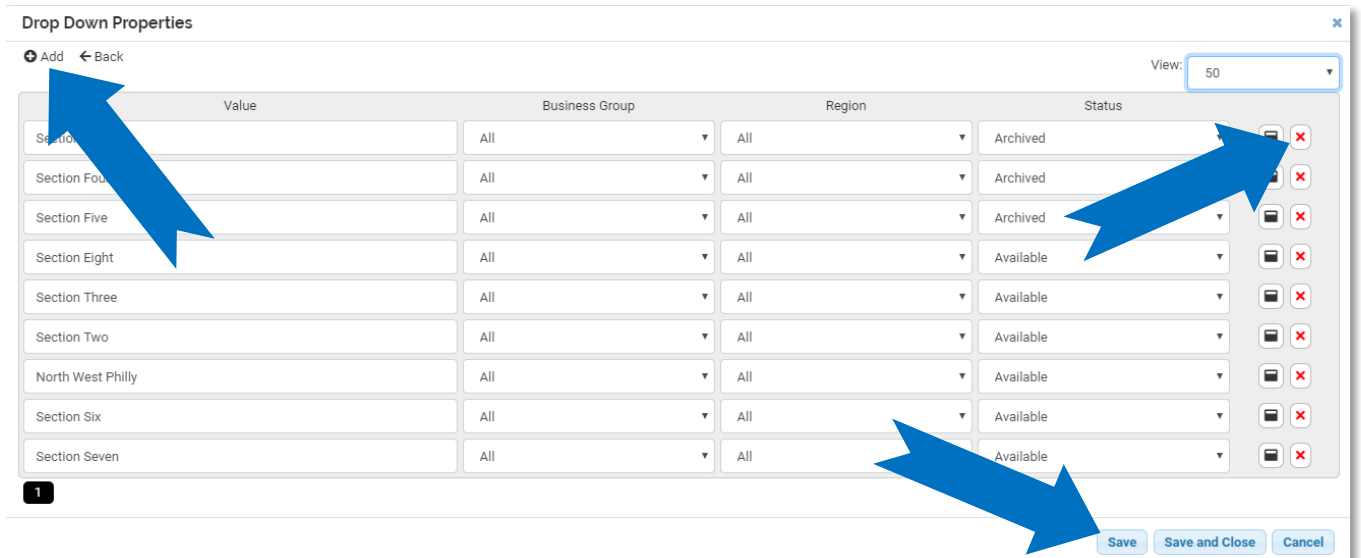


The 'Field Properties' dialog box contains the following fields:

- Field Label:** Section
- Tooltip:** Enter tooltip text
- Field Type:** Dropdown
- Required:** No
- Mobile:** Hidden
- Advance Settings:** [Configure](#)

Buttons: OK, Cancel

The Drop-Down Properties window will then display:



The 'Drop Down Properties' window displays a table with the following columns: Value, Business Group, Region, and Status. A 'View: 50' dropdown is in the top right. Buttons for 'Add', 'Back', 'Save', 'Save and Close', and 'Cancel' are present.

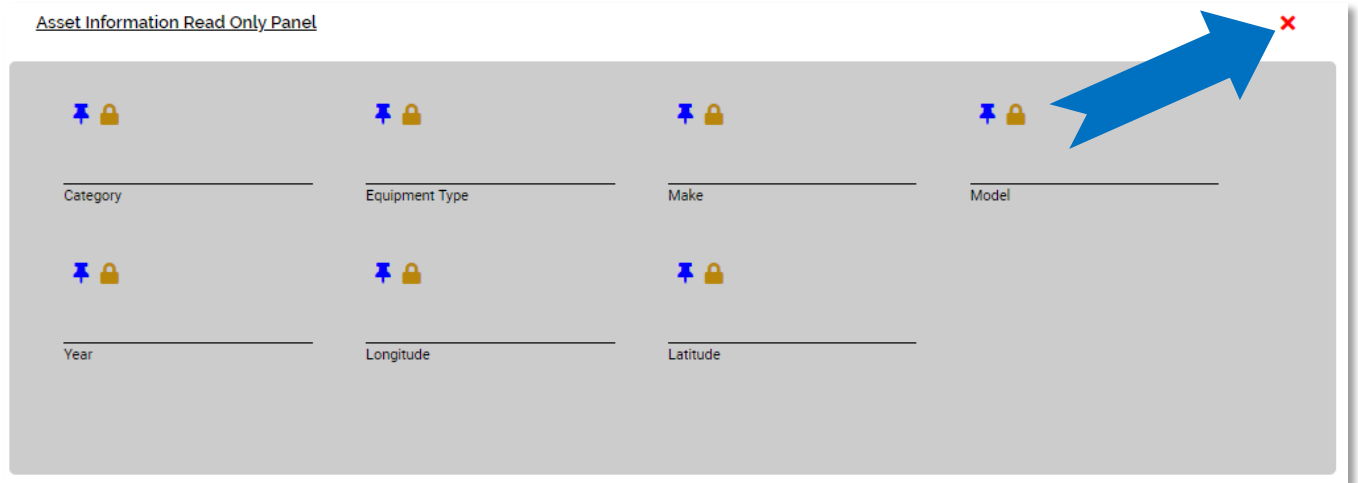
| Value | Business Group | Region | Status |
|-------------------|----------------|--------|-----------|
| Section One | All | All | Archived |
| Section Four | All | All | Archived |
| Section Five | All | All | Archived |
| Section Eight | All | All | Available |
| Section Three | All | All | Available |
| Section Two | All | All | Available |
| North West Philly | All | All | Available |
| Section Six | All | All | Available |
| Section Seven | All | All | Available |

To update a value in the dropdown, select the value you want to update and type over it. Select the **Expand** icon (↕) to show additional fields. You can also choose whether the dropdown value is available or archived.

To add a value, select the **Add** button in the upper left. To delete a value, select the red **X** next to the value you wish to delete.

To save your changes, select the **Save** button at the bottom. There is also the **Save and Close** feature which will save your changes and take you back to the Field Properties page. The **Cancel** button will take you back to the Field Properties page and will not save any changes that were made.

6.8 Edit Read Only Panels





The field names within the read only panels cannot be changed. You may move the panels around by dragging within the panel. The red “x” on the top right-hand corner of the section will delete the read only panel.

6.9 Edit Sub Forms

Two of IndustrySafe’s forms, the Incident Investigation and Employee Incident form, contain sub forms, which can also be edited using the Form Editor.

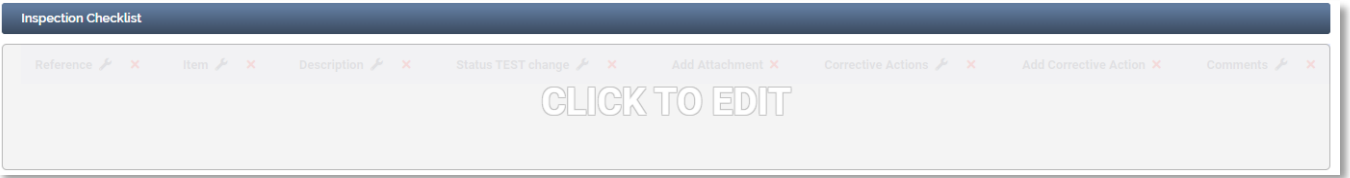
6.10 Adding fields above or below Sub Forms

You can add fields to a section containing a sub form by dragging and dropping fields from the Field Panel to the Form Layout.

Clicking the arrow in the upper right ( / ) will move the sub form to the top or bottom of the section, above or below any added fields.

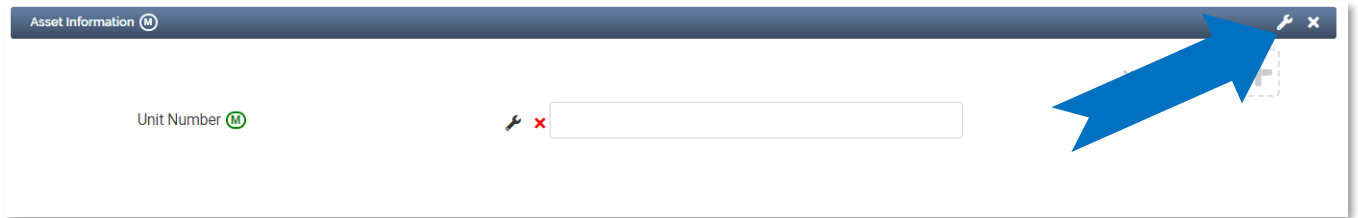
6.11 Editing Sub forms

To edit a sub form’s fields, click anywhere within the gray **Click to Edit** panel.

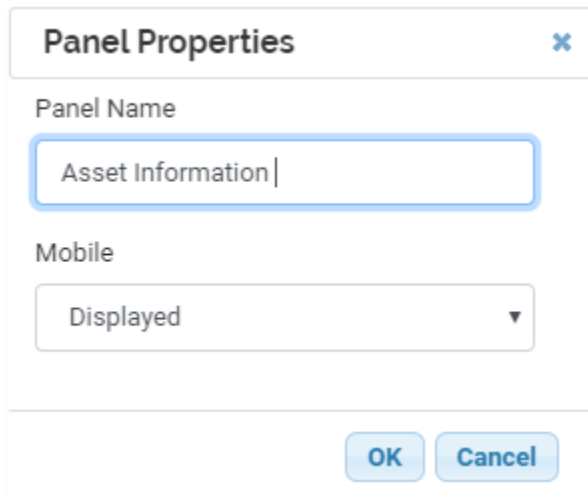


6.12 Editing Sub headings

To edit a sub form's sub heading, click the **wrench** icon located to the right of the sub heading.



A modal will then open, allowing you to modify the subheading.



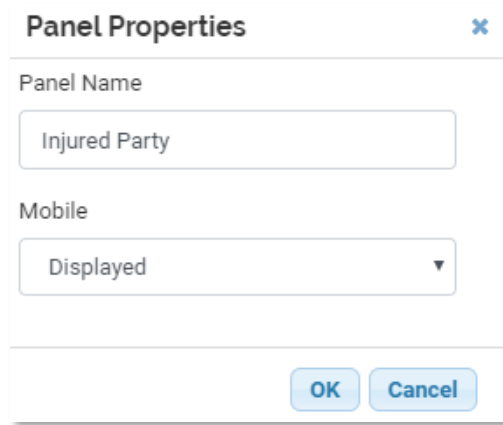
6.13 Editing a Sub forms Button Text

To edit a sub form button's text, click the **wrench** icon located to the right of the button.

The screenshot displays a form editor interface with four input fields and one button. Each input field is labeled with a field name and a status icon (M or P). To the right of each field is a wrench icon and a red 'X' icon. A large blue arrow points to the wrench icon on the 'Add Injured Party' button at the bottom of the form.

| Field Name | Status | Wrench Icon | Red X Icon |
|-------------------|--------|-------------|------------|
| Address | M P | Yes | Yes |
| Date of Birth | P | Yes | Yes |
| Phone Number | M P | Yes | Yes |
| Email Address | M P | Yes | Yes |
| Add Injured Party | - | Yes | No |

A modal will then open, allowing you to modify the button's text.



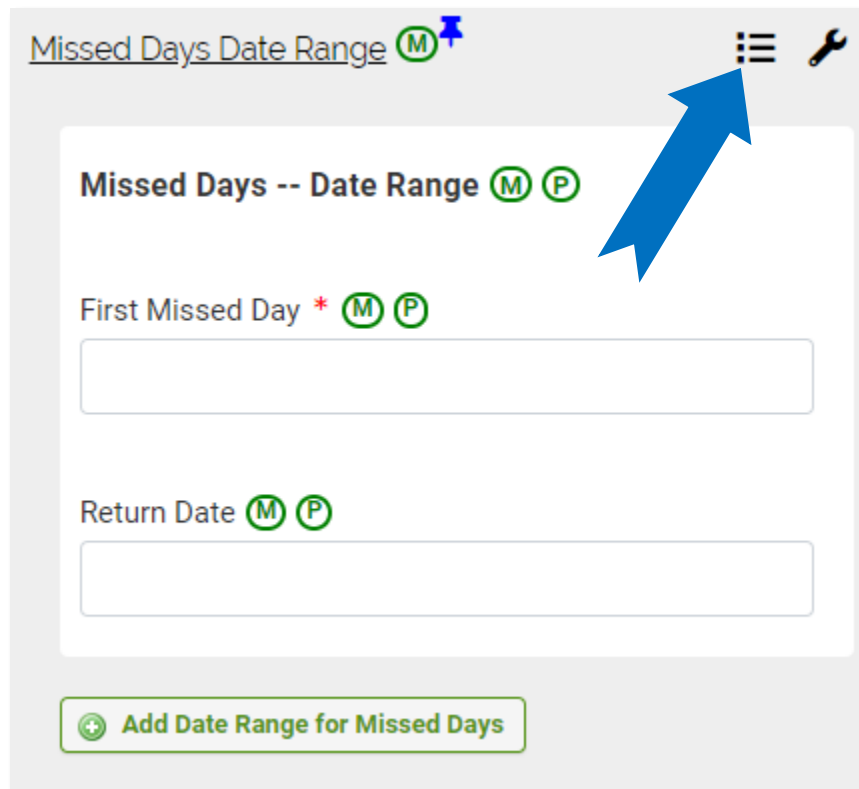
The image shows a 'Panel Properties' dialog box with a close button (x) in the top right corner. It contains two input fields: 'Panel Name' with the text 'Injured Party' and 'Mobile' with a dropdown menu showing 'Displayed'. At the bottom, there are 'OK' and 'Cancel' buttons.

6.14 Editing Nested Sub forms

Certain sub forms, such as the Missed Days Date Range sub form, are nested with other fields in a section.

Nested sub forms can be moved to a different area of their section by dragging and dropping.

To edit a nested sub form's fields, click the icon located in the top right corner of the sub form.



The image shows a 'Missed Days Date Range' sub form. The title bar includes the text 'Missed Days Date Range' followed by a green circle with 'M' and a blue pushpin icon. In the top right corner of the sub form, there is a menu icon (three horizontal lines) and a wrench icon. A large blue arrow points to the menu icon. The sub form contains two input fields: 'Missed Days -- Date Range' with green circles 'M' and 'P', and 'First Missed Day *' with green circles 'M' and 'P'. Below these is a text input field. The second input field is 'Return Date' with green circles 'M' and 'P', also followed by a text input field. At the bottom, there is a green button with a plus icon and the text 'Add Date Range for Missed Days'.