

IndustrySafe Form Editor - Advanced Features

Note: As of the 5.7 Release, only Incidents, Hazards, and Corrective Actions utilize the Form Editor

2/17/16

Version 5.7

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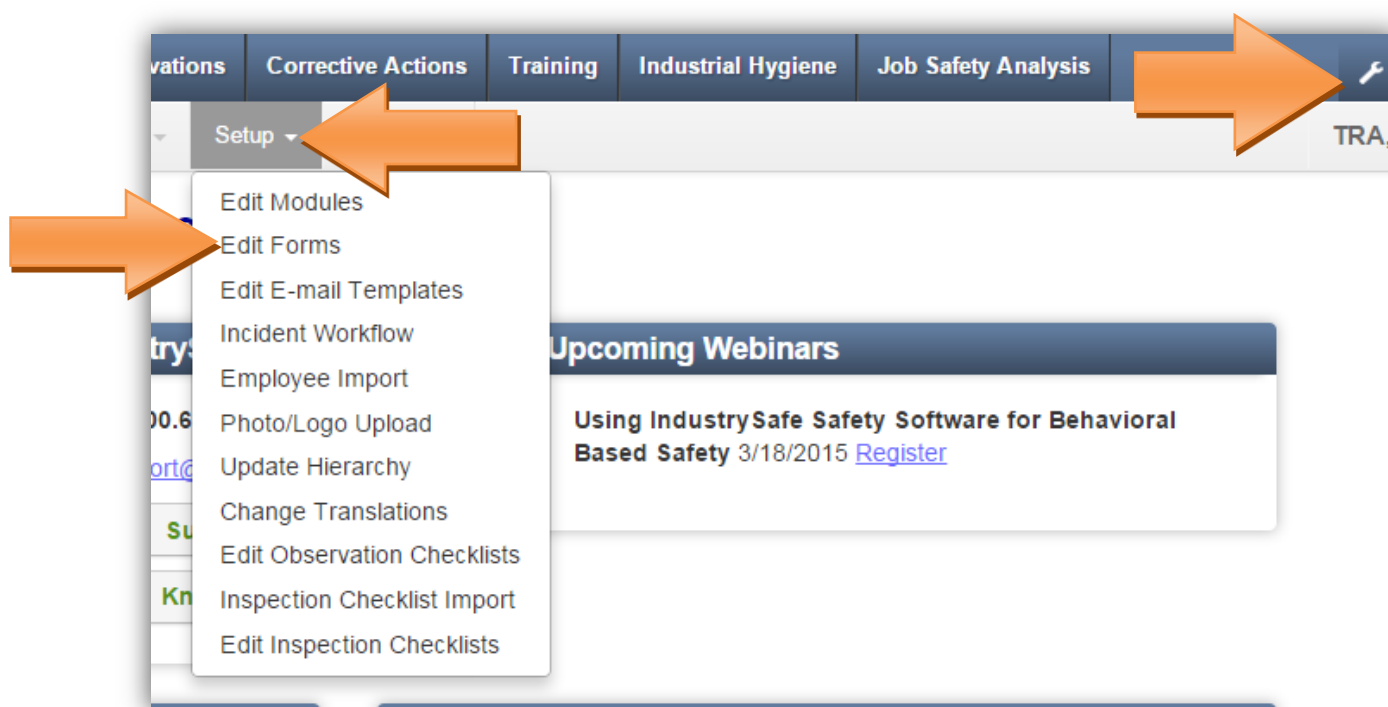
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I. Introduction

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.

To access the Form Editor, log into IndustrySafe, select the System Functions wrench, select Setup, and choose Edit Forms. Please note that only administrators with access to System Functions will be able to access the Form Editor.



Next, choose the recording form you want to edit:

Recording Form*	Hazards ▼
Section*	▼

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.

II. 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.



A. 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.

B. Revert to Last Published

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

C. Publish

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

D. Undo/Redo

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

E. 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
Scott Kaminski	04/09/2015 10:17 AM EST
Amita Malik	04/08/2015 03:02 PM EST
Amita Malik	04/08/2015 03:02 PM EST
Amita Malik	04/08/2015 02:58 PM EST

F. Print Preview

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

III. Field and Features Panels

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.

A. 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.

B. 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.

IV. Form Layout

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.

Hazard Recording Form:10833

[Basic Information](#) | [Asset Information](#) | [Hazard Evaluation](#) | [Additional Features](#) [View All Sections](#)

Basic Information

Reported By: Name

Reported By: Employee ID








Reported By: Title

V. 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.

A. 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

B. Section Navigation Links

Hazard Recording Form:10833 

[Basic Information](#) | [Asset Information](#) | [Hazard Evaluation](#) | [Additional Features](#)

[View All Sections](#)

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.

C. Rename Form

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

Hazard Recording Form:10833 

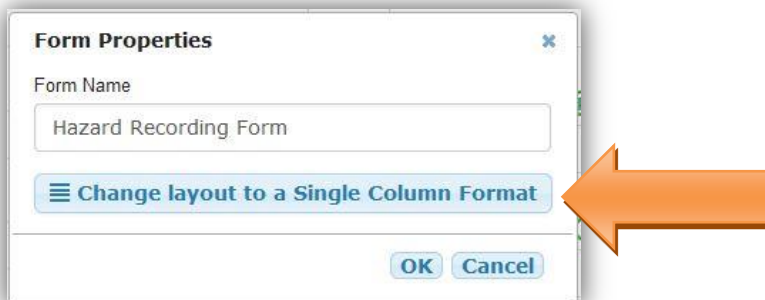
[Basic Information](#) | [Asset Information](#) | [Hazard Evaluation](#) | [Additional Features](#)

[View All Sections](#)



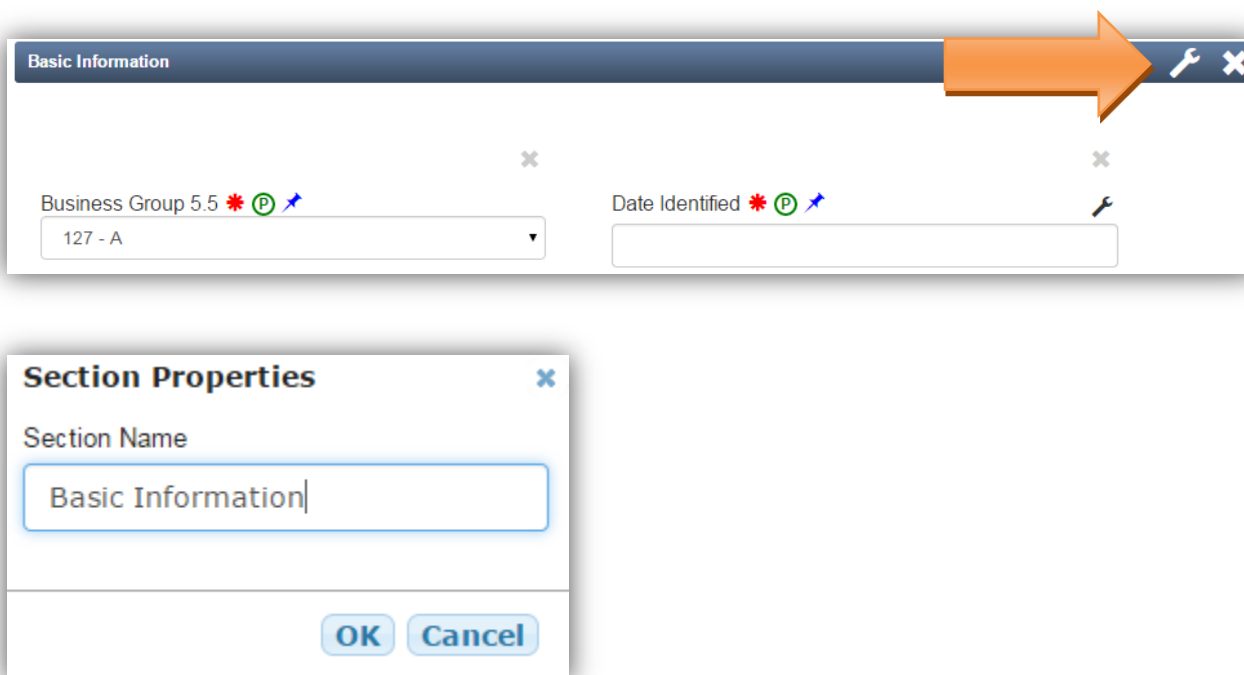
D. Switch to a Single Column Layout

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.



E. 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



F. 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.

G. Adding New Fields and Sections

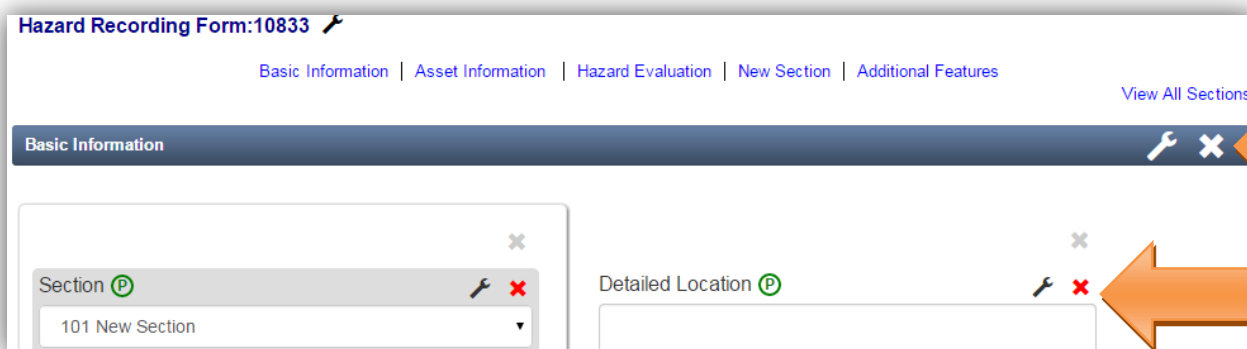
To add a new field, drag the New Field item from the Field Panel to the Form Layout on the right. Then choose the appropriate Field Type for the new field.

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.

H. 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.



I. 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.

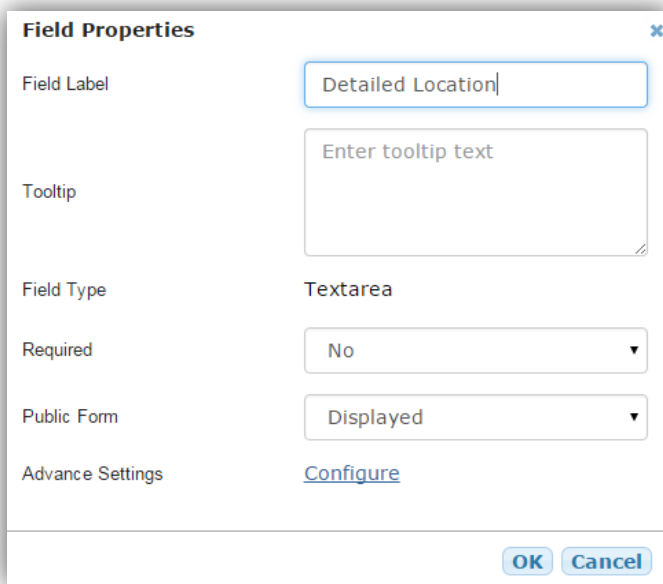
To reorder a section, select View All Sections, and then drag the blue section heading to the new area you would like the section to appear on the form.

J. 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.

K. Edit Field Properties

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.

A screenshot of the 'Field Properties' dialog box. It has a title bar with a close button. The dialog contains several fields: 'Field Label' with the text 'Detailed Location', 'Tooltip' with a text area containing 'Enter tooltip text', 'Field Type' with a dropdown menu showing 'Textarea', 'Required' with a dropdown menu showing 'No', and 'Public Form' with a dropdown menu showing 'Displayed'. At the bottom left is a link 'Advance Settings' with the text 'Configure' below it. At the bottom right are 'OK' and 'Cancel' buttons.

Field Label	Detailed Location
Tooltip	Enter tooltip text
Field Type	Textarea
Required	No
Public Form	Displayed
Advance Settings	Configure

1. Field Label

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

2. 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.

3. Field Type

You cannot change a field type once a field has been created. When you add a new field (See Section F: Adding a New Field 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.

4. Required

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

5. Public Form

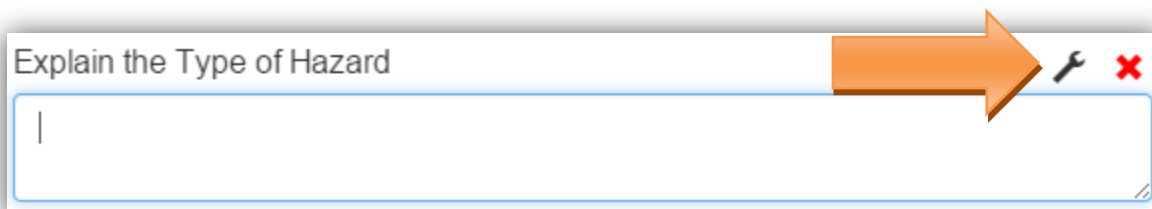
This field property allows you to indicate whether the field is hidden or displayed on your organization's Public Web Form, if applicable.

6. Advance Settings

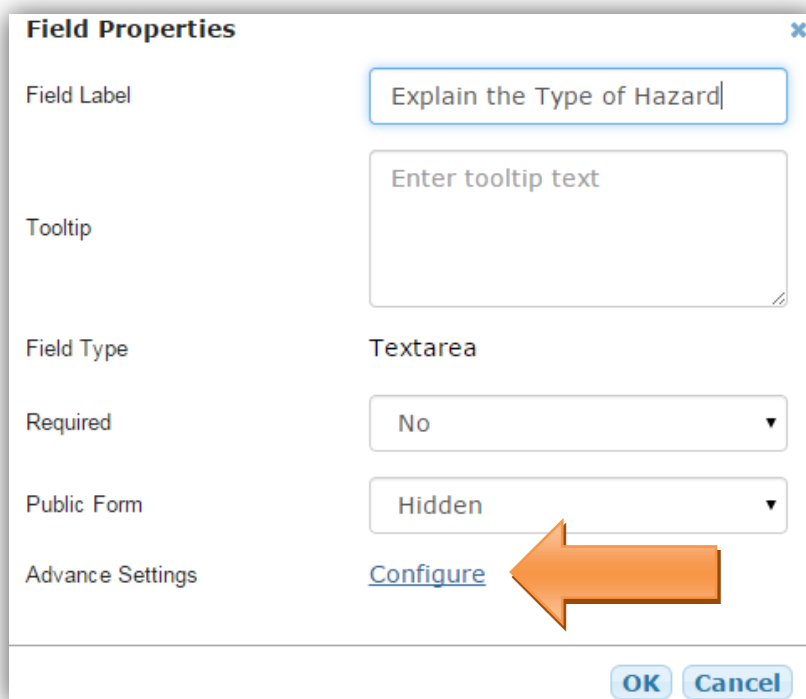
This field property allows you to indicate if the field should be hidden and displayed on the form based on the value of another field. If the advance setting property is not configured or is left blank, the field will always appear on the form. However, if you want the field to only appear on the form 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 "Explain the Type of Hazard":

A screenshot of a form field. The field has a title "Explain the Type of Hazard" in a grey font. Below the title is a large, empty text input box with a blue border. To the right of the input box, there is a small wrench icon and a red "X" icon. A large orange arrow points from the right towards the wrench icon.

From there, select Configure next to Advance Settings:

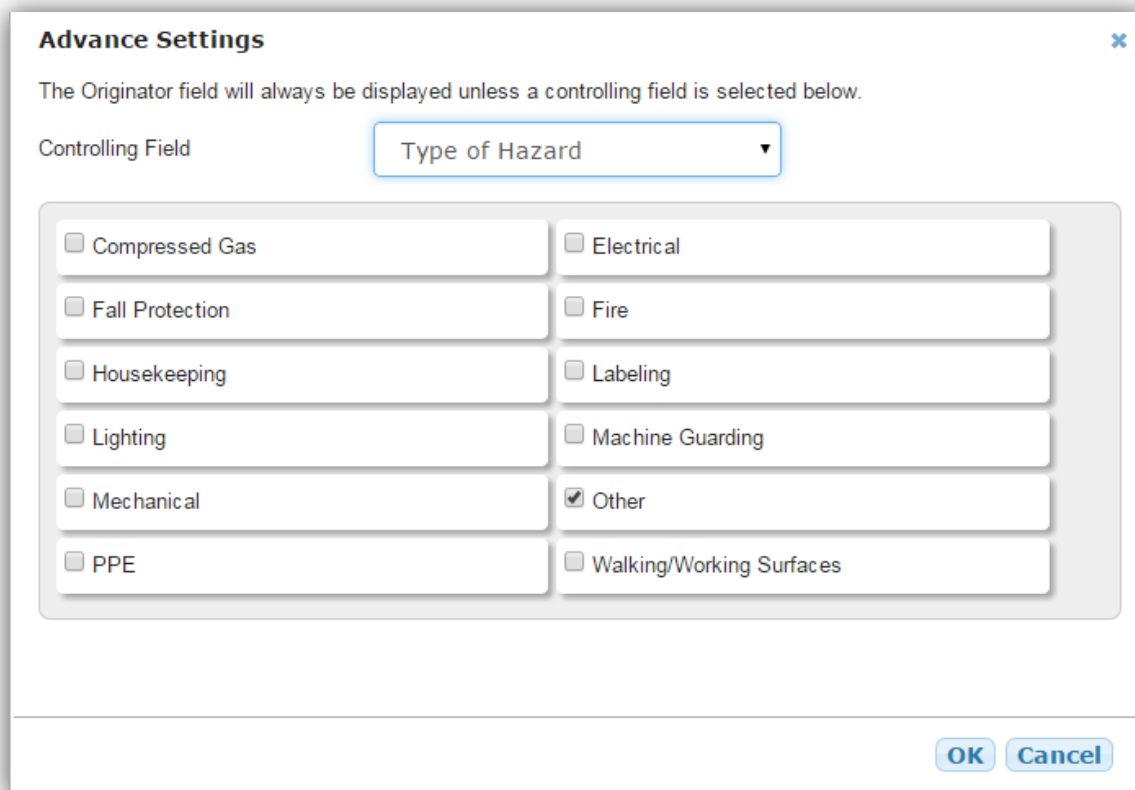


The **Field Properties** dialog box is shown. It contains the following fields:

- Field Label:** A text box containing "Explain the Type of Hazard".
- Tooltip:** A text area with the placeholder text "Enter tooltip text".
- Field Type:** A dropdown menu set to "Textarea".
- Required:** A dropdown menu set to "No".
- Public Form:** A dropdown menu set to "Hidden".
- Advance Settings:** A link labeled "Configure".

An orange arrow points to the "Configure" link. At the bottom right are "OK" and "Cancel" buttons.

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



The **Advance Settings** dialog box is shown. It contains the following fields:

- Controlling Field:** A dropdown menu set to "Type of Hazard".
- Originator field note:** "The Originator field will always be displayed unless a controlling field is selected below."
- Hazard Selection:** A grid of checkboxes for various hazards:

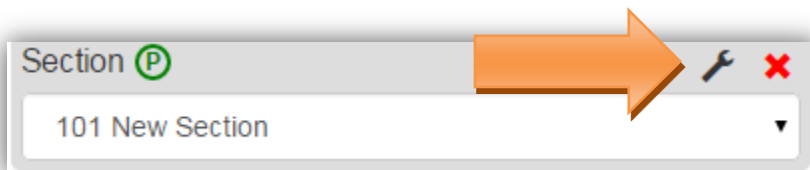
<input type="checkbox"/> Compressed Gas	<input type="checkbox"/> Electrical
<input type="checkbox"/> Fall Protection	<input type="checkbox"/> Fire
<input type="checkbox"/> Housekeeping	<input type="checkbox"/> Labeling
<input type="checkbox"/> Lighting	<input type="checkbox"/> Machine Guarding
<input type="checkbox"/> Mechanical	<input checked="" type="checkbox"/> Other
<input type="checkbox"/> PPE	<input type="checkbox"/> Walking/Working Surfaces

At the bottom right are "OK" and "Cancel" buttons.

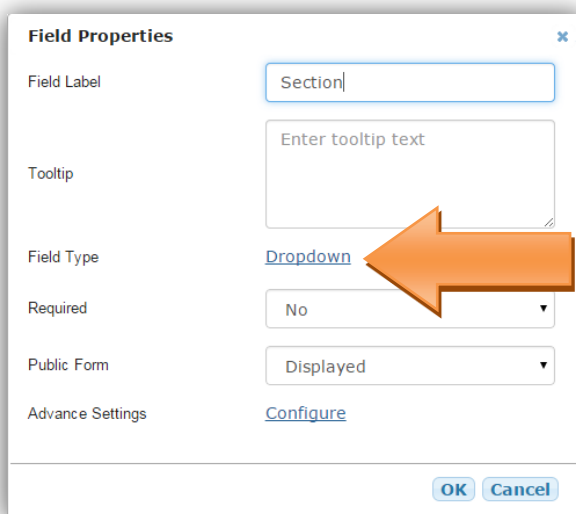
Now when "Other" is selected for the Type of Hazard, the Explain the Type of Hazard field will appear on the form.

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 Drop Down Properties window will then display:


Drop Down Properties

 Add  Back

Value	Business Group	Region	Status	
API Se	Test	North Ame		 
API Se	Test	North Ame		 
API Se	Test	North Ame		 
API Se	Test	North Ame		 
API Se	Test	North Ame		 
API Se	Test	North Ame		 

1 2 3 4 5 6 7 8 9 10 11

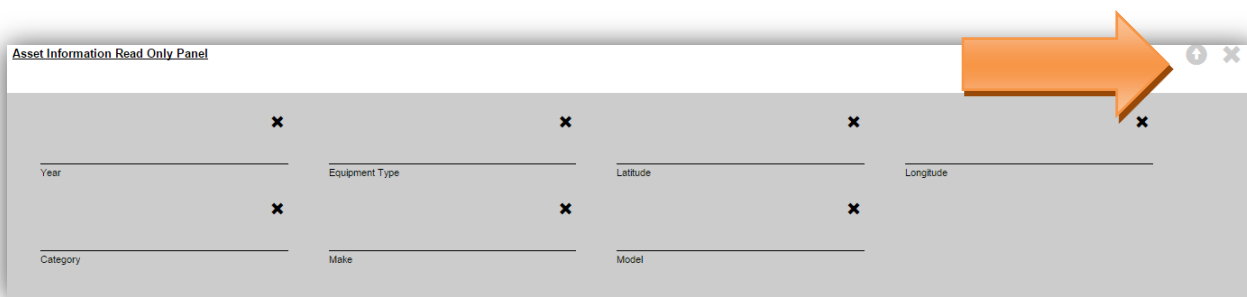
  

To update a value in the dropdown, select the value you want to update and type over it. Select the Expand icon () to show additional fields. You can also choose whether the dropdown value is available or archived.



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.

L. Edit Read Only Panels



The field names within the read only panels cannot be changed. You may remove a field with the black “x” and you can move them around by dragging within the panel. The arrow in the



upper right ( / ) will move the panel to the top or bottom of the section. The grey “x” next to the arrow will delete the read only panel.

M. Edit Subforms

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

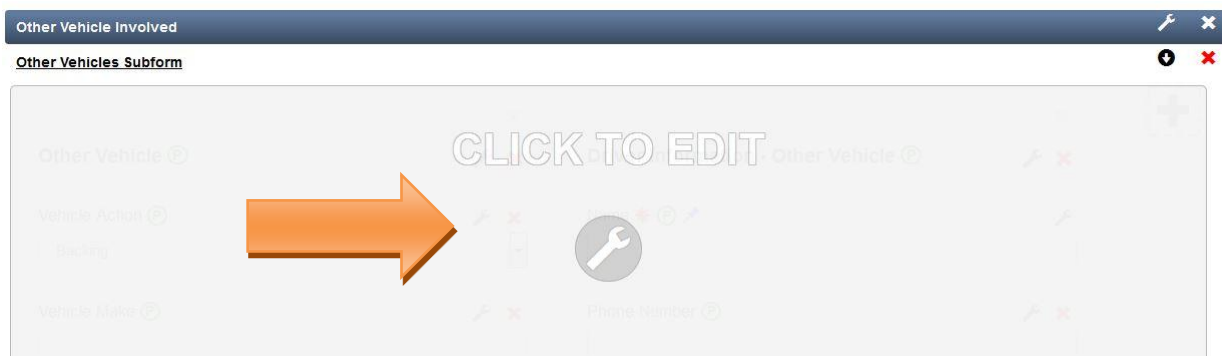
1. Adding fields above or below subforms

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

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

2. Editing Subforms

To edit a subform’s fields, click anywhere within the gray “Click to Edit” panel.

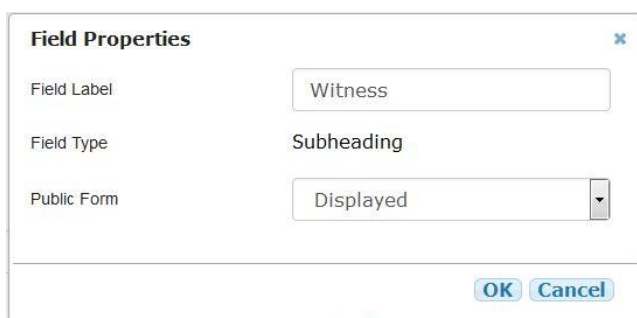


3. Editing Subheadings

To edit a subform's subheading, click the wrench icon located to the right of the subheading.

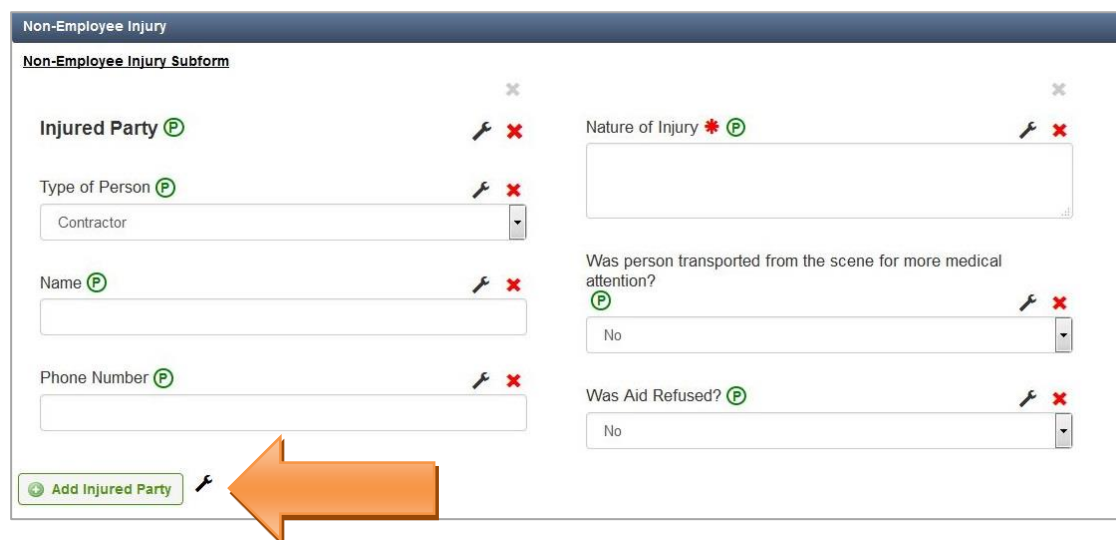


A modal will then open, allowing you to modify the subheading.



4. Editing a Subform's Button Text

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



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



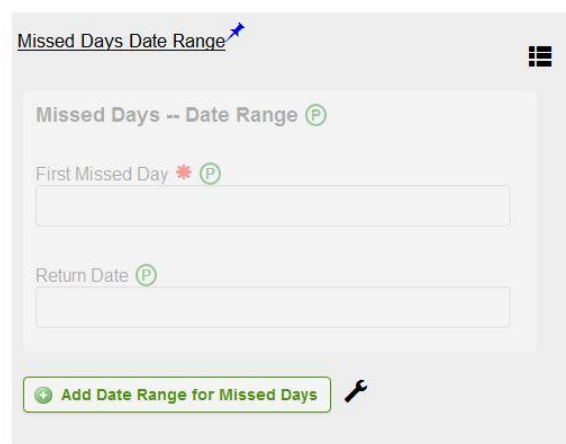
A modal dialog titled "Panel Properties" with a close button (X) in the top right corner. It contains a label "Panel Name" above a text input field containing the text "Injured Party". At the bottom right, there are two buttons: "OK" and "Cancel".

5. Editing Nested Subforms

Certain subforms, such as the Missed Days Date Range subform, are nested with other fields in a section.

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

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



A subform titled "Missed Days Date Range" with a blue star icon in the top right corner. It contains a section titled "Missed Days -- Date Range" with a green circle icon (P). Below this section are two text input fields: "First Missed Day" with a red asterisk icon and a green circle icon (P), and "Return Date" with a green circle icon (P). At the bottom, there is a green button labeled "Add Date Range for Missed Days" with a green plus icon and a wrench icon.

