e-Builder

| Dashboard | Projects | **Forms** | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |

Forms for | * Training Docs - Ascension Health ▼

Filter Forms

Fill Out Form

| Project Name: | * Training Docs - Ascension Health |
| Type of Form: | All Workflow and Static Forms ▼ | ☑ Open ☐ Closed |

Workflow in Your Court
Workflow You Initiated
All Workflow and Static Forms
-- Only Workflow Forms
---- Action Item
---- New User Request
-- Only Static Forms
---- Safety Summary

| Containing Text: | e form ▼ |

Filter

Project Menu

- > Details
- Forms
- > Issues
- Processes
- > Documents
- Schedule
- > Cost
- Contacts

Recent Pages... ▼

Workflow and Static Forms

Page 1 ▼ of 1 Show 25 ▼

Subject					
Prefix	# ▼	Author	Held By	Due Date	Status
ACTION ITEM : DRAFT A ADOPTION STILL ASSESMENT DASHBOARD					
	3	Brett Purdy e-Builder, Inc.	Brett Purdy e-Builder, Inc.	05.02.2014	8.0d late

1. From **Project Menu,** select the **Forms** module.
2. Change the Type of Form to various option settings:
   a. Workflow in Your Court
   b. Workflow You Initiated
   c. All Workflow and Static Forms
   d. Or…select a specific form type such as **Action Item**
3. Do you want to All form instances both Open & Closed? Select the **Open** & **Closed** checkboxes
4. Click the **Filter** Button to change the view to see the form type and status you have selected.
5. To Fill Out a Form, Click the **Fill Out Form** Button.
6. To change the Sort order of the forms displayed, click on the title of the header bar you want to sort by. A blue down or up arrow will appear next to the controlling sort header.
7. To go to another project, but remain in the folder module, choose from the project drop down.

Forms – Workflow – Action Item

e-Builder

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Initiating a form - Follow these steps:
1. Go to the Forms tab.
2. Select the project you need to fill out the Form for.
3. Click the **Fill Out Form** button.
4. Select the form type.
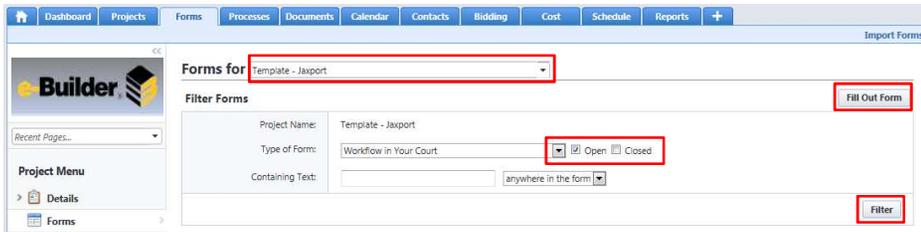
5. Select who should receive the form and who should be copied
6. Select a date due.
7. Fill out all fields that are required. (Identified by the maroon color field name).
8. Fill out any additional fields.
9. Attach files (Optional)
Click on the Attached Files tab.
Click the Attach Files button.
If the files are already in e-Builder, click the **Add Files** button under the **Add Files From e-Builder** box.
Select the folder that files are in and then select the files.
Click **Attach**
If the files are on your computer (or other accessible location), use the **Upload Documents From Your Computer** box.
You can click the files and drag them into the box or you can select the files by clicking **Add Files**.
Click **Upload File**.
10. Click **Post Form**.
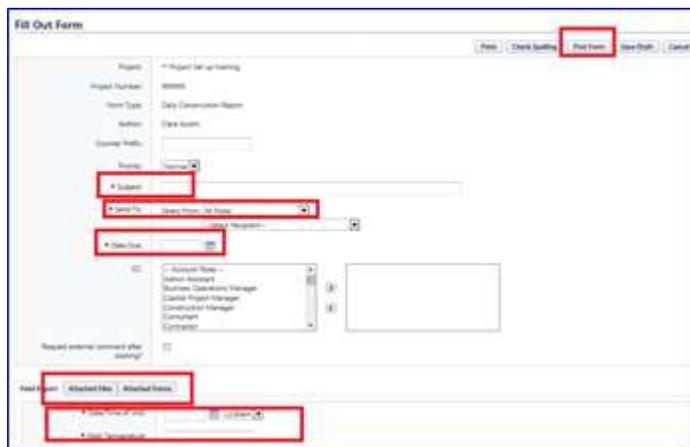
Responding to a Form – Follow these steps:

1. Go to the **Forms** tab.
2. Select **Workflow in My Court** from the drop down list in the middle of the screen.
3. Click the subject of the form. The form will now open in a new window.
4. Update the fields for your response
5. Click **Reply**
6. Enter additional comments if needed.
7. Click the **Attach Files** button (see initiating form section for instructions)
8. Click **Reply**

Forwarding or Adding Comments to a form

1. While in the form, click either the Forward or Comment tab
2. Both comments and any actions taken on the form will appear it he comments tab
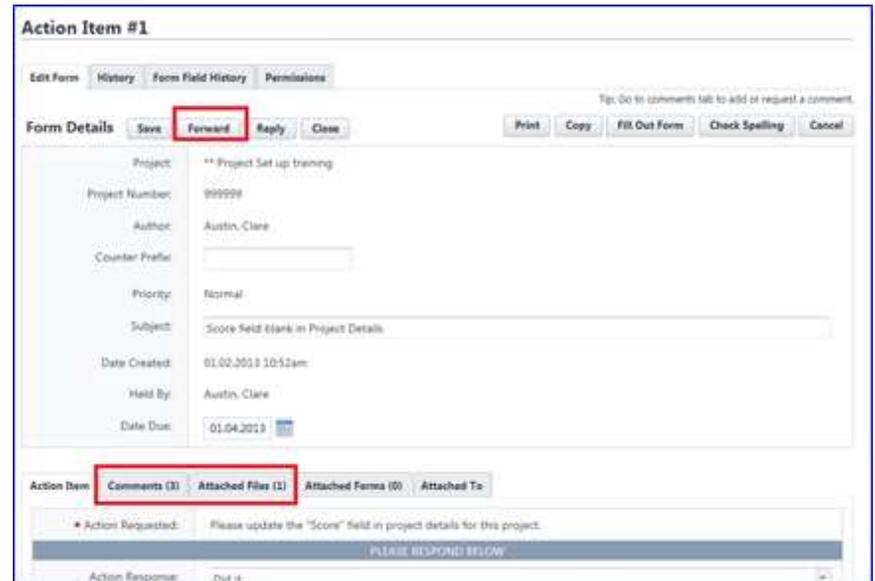
Closing a form:

1. Once a form is complete it is important to close the form. (This stops the date due clock)
2. You will have to click close form on the pop up window, as well, to close the form completely.
3. You can re-open a form to start the conversation again at a later date, if needed.