



HSEQ Management Software

Viking Form Editor User Guide

Table of Contents

Form Workflow/Definition	1
Edit an existing form	2
Section	3
Template	4
Add a Template	4
Question	5
Add a Question	6
Advanced Validation Rules.....	7
Linked Records	8
Signature	10
Add a Signature	10
Label	11
Add a Label.....	11
Multiselect Checkbox	12
Add a Multiselect Checkbox	13
Change the Order of Items listed	14
Remove an item(s) listed.....	14
Edit a Multiselect List	15
Select Field	16
Add a Select Field.....	16
Date	17
Add a Date	17
Advanced Validation Rules.....	18
Radio Button	19
Add a Radio Button.....	19
Person Select Field	20
Add a Person Select Field	20
Update an Existing Form Design	21
Edit Form Fields.....	21
Delete Form Fields	21

Form Workflow/Definition

Accessed via the Administration menu the Form/Workflow Definition is used to select the module that is required to be changed. Each module will contain at least one form. Associate with the module is a series of workflow steps.

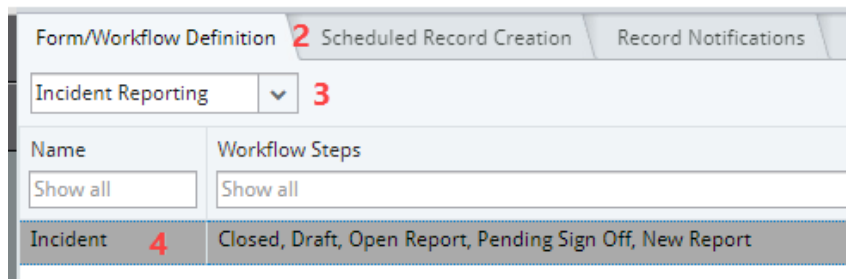
The forms listed within the module contain the Name of the form and the workflow steps e.g. Draft, Open and Completed. Each of the forms can be opened and the design changed as required using the editor tools.

The Form Editor tools are available to Administrators to create forms and to maintain existing forms within the system. Form Editor includes many quick and easy to use tools. Depending upon the design of your system the create form option may not be available.

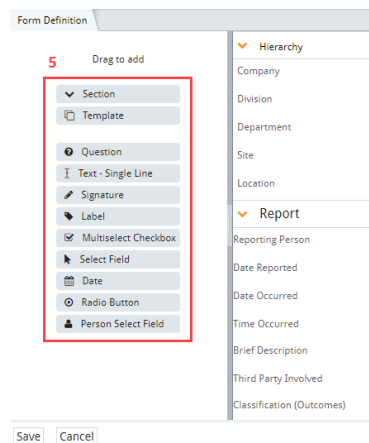
Follow the steps below to begin using the Form Editor tools:

Edit an Existing Form

1. Select **Administration** from the menu panel.
2. **Form/Workflow Definition** Tab is visible by Default. This is the tab used to edit forms.
3. Select the **drop down list** and select the required **module** to edit.
4. **Double Click** to select the required form to edit in the workflow step list.



5. **Drag and drop** to add the required Form Editor tool to the form.



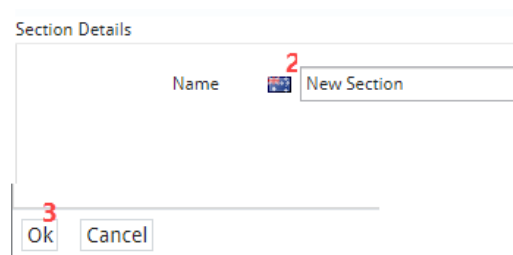
Follow the steps on the next pages for information on each of the Form Editor tools.

Section

A Section is used to create a new Section within the form that is being edited. A Section defines an area on a form with distinct fields relating to the section heading. By including Sections within a form, it helps users to complete required fields relevant to a specific stage or task.

Add a Section

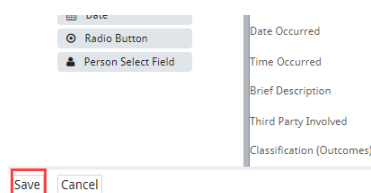
1. Drag and drop the **Section** button to the required location on the form.
2. Enter the **Name** of the Section.
3. Select **Ok**.



Section Details

Name

4. Select **Save** on the bottom of the Form Definition to update the changes to the module.



Form Definition

Radio Button
Person Select Field

Date Occurred
Time Occurred
Brief Description
Third Party Involved
Classification (Outcomes)

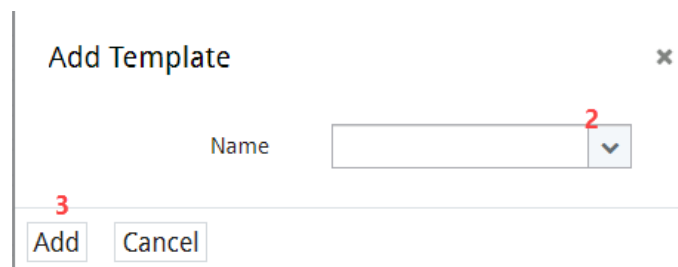
Template

Templates are an effective tool to aid the ability to quickly design a form that contains the same information that is required within other forms. Each Section within a form can be saved as a Template and then used within other forms. Using this feature can save a lot of time when designing new forms. Once a Template has been saved it can be used within any other form(s).

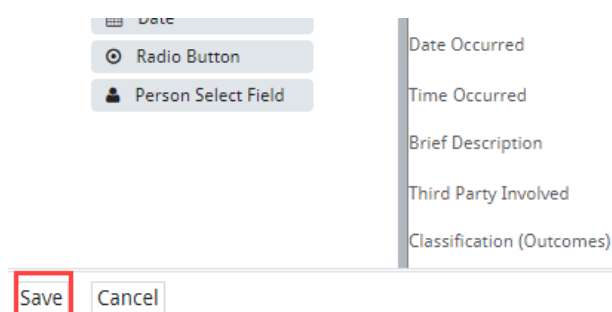
After a Template has been added to another form the fields within the template can be edited. Any changes made will apply to the current form being edited.

Add a Template

1. Drag and drop the **Template** button to the required location on the form.
2. Select the Template to add from the **Name** drop down list.
3. Select **Add** and the template content will now be visible on the form.



4. Select **Save** to update the changes to the module.



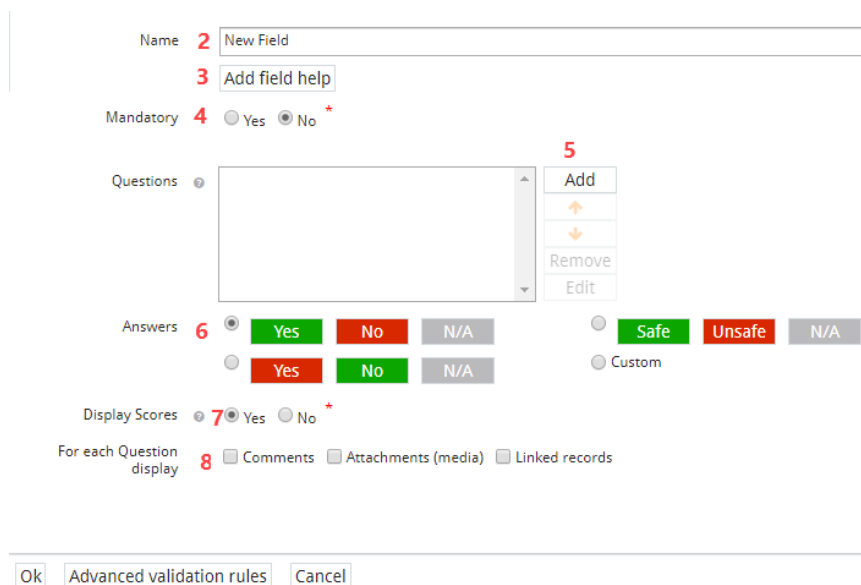
Question

Questions are a commonly used format within many modules within myosh. Questions within a form provide a user with the ability to select from a pre-defined list and also to provide additional information such as comments, images or linked records.

Colour coding assigned to answers enables the person reviewing the answers a quick visual analysis of the scoring. Scoring can be displayed or hidden. Questions can be made mandatory and adding Field help assists users with the type of content that is required to be entered.

Add a Question

1. Drag and drop the **Question** button to the required location on the form.
2. Select the **Name** field to enter the heading for the Questions.
3. Select **Add** field help to add information to assist users.
4. Select **Yes** or **No** to choose whether the questions are mandatory.
5. Select **Add** and enter the question and select **Ok**. Repeat step 5 for all other questions.
6. Select the **Answer type** e.g. Yes/Safe (Green) No/Unsafe (Red) N/A (Grey), or you can select Custom to add in your own Answer buttons, Colours and Scores.
7. Select **Yes** or **No** to Display Scores.
8. Click on the checkboxes for each question to display **Comments**, **Attachments** and/or **Linked Records** and Select **Ok**.



Name **2**

3

Mandatory **4** Yes No *

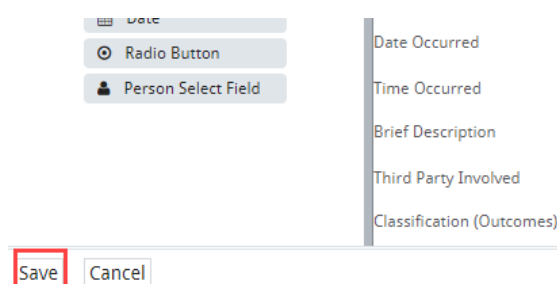
Questions **5**

Answers **6** Custom

Display Scores **7** Yes No *

For each Question display **8** Comments Attachments (media) Linked records

9. Select **Save** to update the changes to the module.



Date Occurred
Time Occurred
Brief Description
Third Party Involved
Classification (Outcomes)

Advanced Validation Rules

Advanced Validation Rules can be used to ensure that if an answer is selected then a mandatory field must be completed e.g. a Comment, Linked Record or Attachment.

10. Select **Advanced Validation Rules** button at the bottom of the form.
11. Select the **Rule** that is to be applied.
12. Select the **Field** the Rule is to be applied
13. Select **Ok**.

Advanced Validation Rules

When answer is the following fields are mandatory:

Comments Linked records

- Yes
- No
- N/A

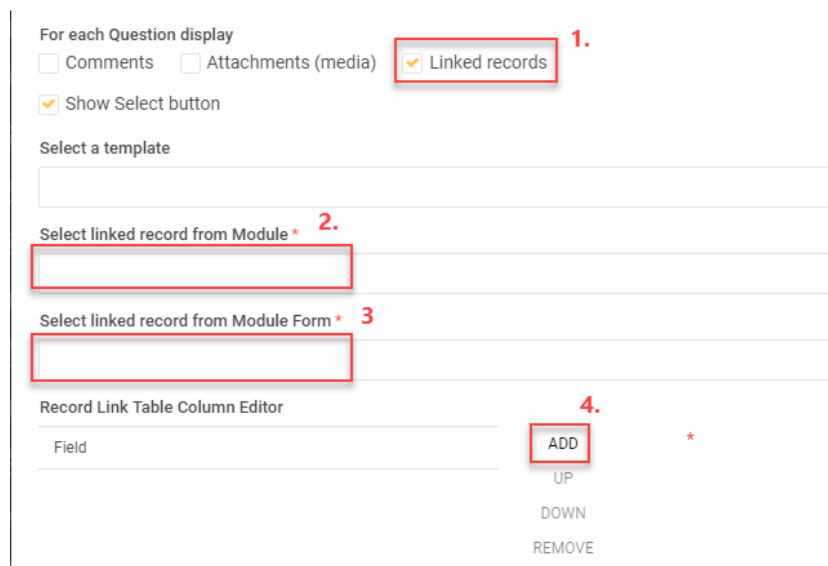
Linked Records

Including a linked record is a way of including a user the option to create a record from another module. Typically a linked record would be included from the Actions or Hazard module.

Linked records are displayed in a table in the record they are created in and available in the associated module e.g. Actions. They can be updated and edited from within the record they are linked or within the originating module.

Add a Linked Record

1. Select **Linked records**.
2. In the **Select linked record from Module** drop down list select the module the record is to link e.g. Actions.
3. In the **Select linked record from Module Form** drop down list select the form the record is to link to e.g. Actions.
4. Select **Add** to define the column headings to be included in the record table.



For each Question display

Comments Attachments (media) **Linked records** **1.**

Show Select button

Select a template

Select linked record from Module * **2.**

Select linked record from Module Form * **3.**

Record Link Table Column Editor

Field	ADD 4.	*
	UP	
	DOWN	
	REMOVE	

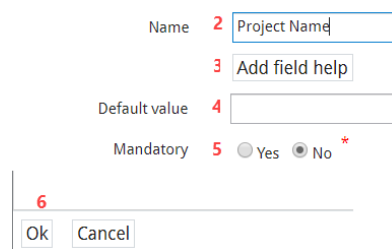
5. Scroll the list and select the fields to add as column headings in the table. Further column headings can be included by selecting Add.
6. Select **Ok**.

Text – Single Line

The Text – Single Line is used within a form to allow a user to input Free Text. It can be set to Mandatory and can also contain default content. If content is set to show by Default it can be removed when a person is completing the field. Adding Field help assists users with the type of content that is required to be entered.

Follow the steps below to begin using **Text – Single Line**:

1. Select **Text – Single Line** button drag to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add Field help** to add information to assist in the completion of the text field.
4. As required enter any **Default Values** to appear within the field.
5. Select **Yes** or **No** to make the single text line mandatory and Select **Ok**.



Name 2 Project Name

3 Add field help

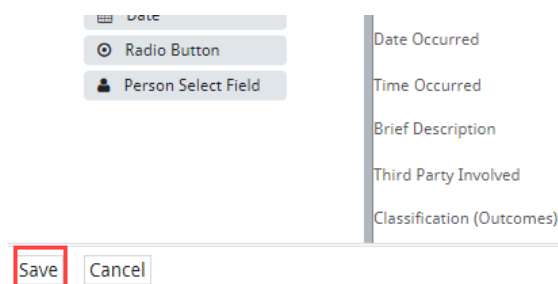
Default value 4

Mandatory 5 Yes No *

6

Ok Cancel

6. Select **Save** to update the changes to the module.



Date
 Radio Button
 Person Select Field

Date Occurred
 Time Occurred
 Brief Description
 Third Party Involved
 Classification (Outcomes)

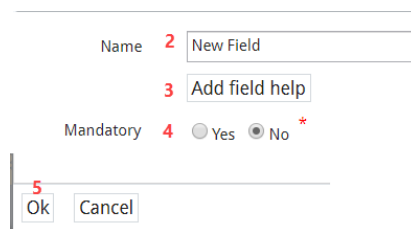
Save Cancel

Signature

An Electronic Signature can be attached to a form as verification of the intent to approve or accept the contents of the document/form. Signatures are supported in the mobile app and require a touch screen to utilise the functionality. Adding Field help assists users with the type of content that is required to be entered.

Add a Signature

1. Drag and drop the **Signature** button and to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add Field help** to add information to assist in the completion of the text field.
4. Select **Yes** or **No** to make the single text line mandatory.
5. Select **Ok**.



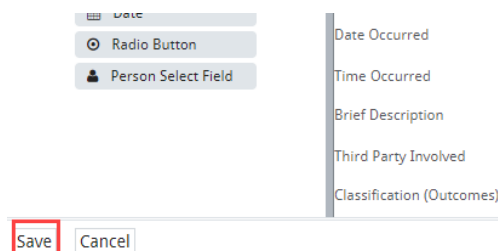
Name ² New Field

³ Add field help

Mandatory ⁴ Yes No *

⁵ Ok Cancel

6. Select **Save** to update the changes to the module.



Date Occurred
 Radio Button
 Person Select Field

Date Occurred
 Time Occurred
 Brief Description
 Third Party Involved
 Classification (Outcomes)

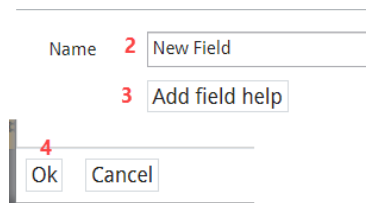
Save Cancel

Label

A Label can be used to define a subsection with your choice of location, within the form. A label may also be used to provide information regarding the section to be completed. The Label will be displayed in Bold Type Font.

Add a Label

1. Drag and drop the **Label** to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add Field help** to add information to assist in the completion of the text field.
4. Select **Ok**.

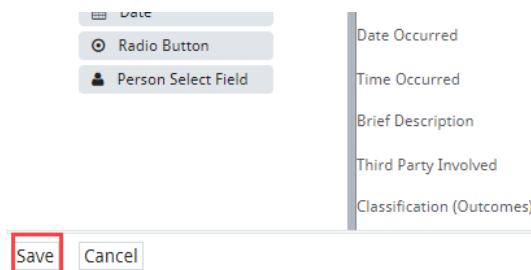


Name **2** New Field

3 Add field help

4 Ok Cancel

5. Select **Save** to update the changes to the module.



Date
 Radio Button
 Person Select Field

Date Occurred
 Time Occurred
 Brief Description
 Third Party Involved
 Classification (Outcomes)

Save Cancel

Multiselect Checkbox

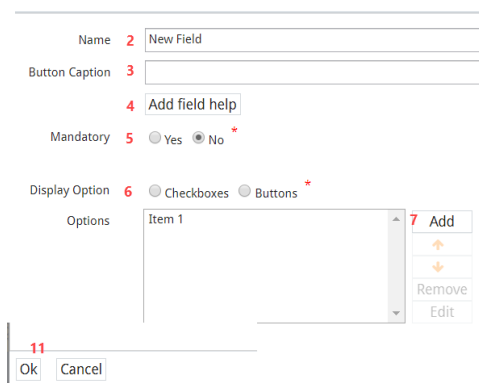
A Multiselect Checkbox is an aid to assist the completion of a form without the need of free text options. Using a multi select checkbox enhances data integrity as it limits the options available to the person completing the form to a pre-defined list.

The Multiselect Checkbox values can be displayed as checkboxes or buttons. The order and items available in a multiselect list can be changed at any time. Re-ordering or removing an item from the list will apply to new forms. Any previous items associated with the previous list ordering or list values will still be visible.

Checkbox or Button options can be set to mandatory and adding field help assists users with the type of content that is required to be entered, in order to complete the form sufficiently.

Add a Multiselect Checkbox

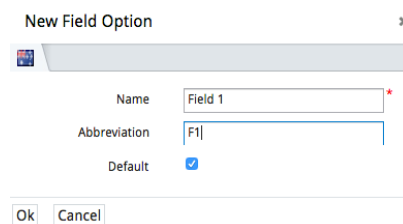
1. Select **Multiselect Checkbox** button drag to the required location on the form.
2. Enter the **Name** of the Field.
3. Enter the **Button Caption**.
4. Select **Add Field help** to add information to assist in the completion of the text field.
5. Select **Yes** or **No** to make the single text line Mandatory.



The screenshot shows a configuration window with the following elements:

- Name:** 2 New Field
- Button Caption:** 3
- Add field help:** 4 (checked)
- Mandatory:** 5 Yes No *
- Display Option:** 6 Checkboxes Buttons *
- Options:** A list containing 'Item 1' with an 'Add' button (7) and 'Remove', 'Edit' buttons.
- Bottom:** 11 Ok Cancel

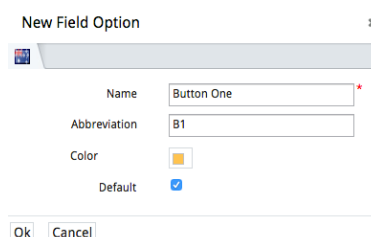
6. Select the Display Option, either **Checkboxes** or **Buttons**.
7. If **Checkboxes** are selected, the New Field option will display (shown below). Enter the Name of the Field, Abbreviation and select if the checkbox is to be Default. Select ok.



The screenshot shows a 'New Field Option' dialog box with the following fields:

- Name:** Field 1 *
- Abbreviation:** F1
- Default:**
- Buttons:** Ok Cancel

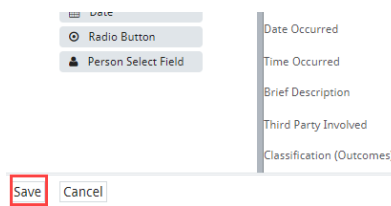
8. If **Buttons** are selected, then New Field option will display. Enter the **Name** of the Field, **Abbreviation** and select a **Colour**. The option to select the button as **Default** is available. Select **Ok**.



The screenshot shows a 'New Field Option' dialog box with the following fields:

- Name:** Button One *
- Abbreviation:** B1
- Color:**
- Default:**
- Buttons:** Ok Cancel

9. Repeat the above steps to add all list items then select **Ok**.
10. Select **Save** on Form Definition to update the changes to the module.

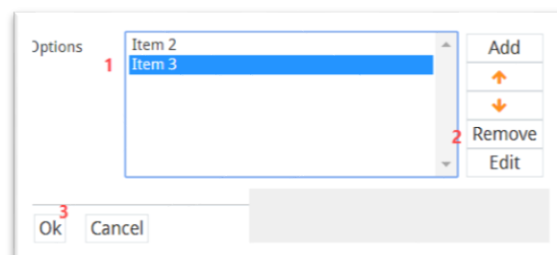


Change the Order of Items listed

1. Select the **Item** in the list that is to be moved.
2. Select the **Up arrow** to move the item up the list.
3. Select the **Down arrow** to move the item down the list.
4. Repeat the above steps for any other items to be moved and Select **Ok**.

Remove an item(s) listed

1. Select the **Item** in the list that is to be moved
2. Select **Remove**
3. Select **Ok**



Edit a Multiselect List

1. Select the **Item** to Update.
2. Select **Edit**.
3. Enter the new value in the **Name** field.
4. As required an **Abbreviation** can be entered.
5. Select **Default** to show the item selected within the form.
6. Select **Ok**.

Name	3	<input type="text" value="Item 1"/>
Abbreviation	4	<input type="text"/>
Default	5	<input type="checkbox"/>

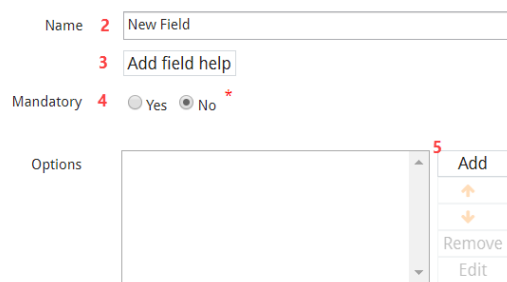
6

Select Field

The Select Field option is a quick and easy field to be able to select from a drop down list that displays a list of prefilled options to select from.

Add a Select Field

1. Click on the **Select Field** button and drag to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add field help** to add information to assist in the completion of the text field.
4. Select **Yes** or **No** to make the field mandatory.
5. Select **Add** to add in the Options available.



Name **2**


3

Mandatory **4** Yes No *

Options **5**

-
-
-
-
-

6. Enter the **Name** to add information to assist in the completion of the text field.
7. Enter the **Abbreviation** if required.
8. Select **Default** if the value is to be selected by default and click on **Ok**.

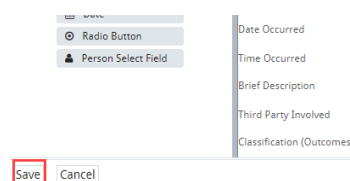


Name **6** *

Abbreviation **7**

Default **8**

9. Select **Save** to update the changes to the module.



Radio Button
 Person Select Field

Date Occurred
 Time Occurred
 Brief Description
 Third Party Involved
 Classification (Outcomes)

Date

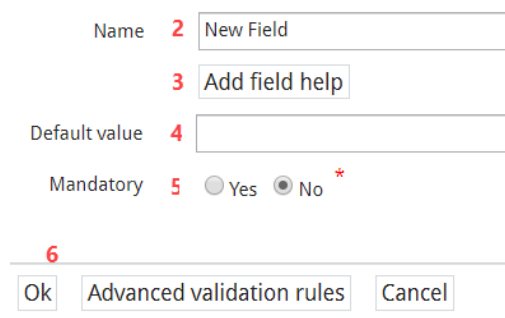
The Date option is commonly used when completing many types of forms. Dates can be set to a default value e.g. Current Date. For some forms it may be a requirement to enter a date for the current day or previous dates.

Advanced Validation Rules can be applied to restrict the dates available. Restricting the date ensures Users do not incorrectly select a future date.

The Date field can be designed to be a mandatory field. Adding Field help assists users with the type of content that is required to be entered.

Add a Date

1. Click on the **Select Field** button and drag to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add field help** to add information to assist in the completion of the text field.
4. Select an option from the drop down list for **Default value** if required.
5. Select **Yes** or **No** to make the field mandatory.
6. Select **Ok**.



Name **2**

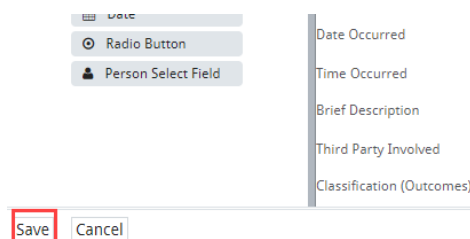
3 Add field help

Default value **4**

Mandatory **5** Yes No *

6

7. Select **Save** to update the changes to the module.



Radio Button

Person Select Field

Date Occurred

Time Occurred

Brief Description

Third Party Involved

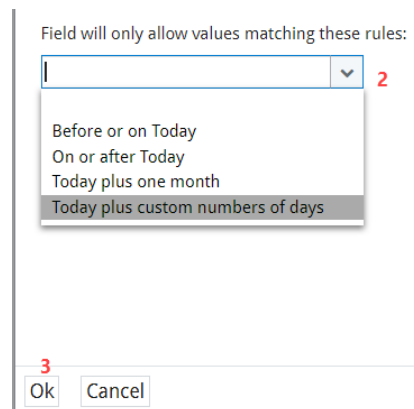
Classification (Outcomes)

Advanced Validation Rules

The Advanced Validation Rules are an optional choice if you would like the Date Field to allow values matching a particular rule.

1. Select **Advanced Validation Rules** button at the bottom of the form.
2. Select the relevant **Rule** required from the drop down list.
3. Select **Ok**.

As shown in example below, you can select from the specific Date Fields that are listed in the drop down list.

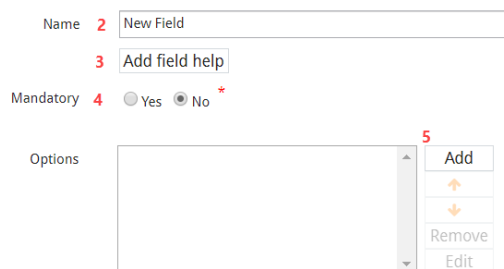


Radio Button

A Radio Button is an aid to assist the completion of a form without the need of free text options. Using a radio button enhances data integrity as it limits the options available to the person completing the form to a pre-defined list of options. Radio buttons can be set to mandatory and a default value can be selected. Adding Field help assists users with the type of content that is required to be entered.

Add a Radio Button

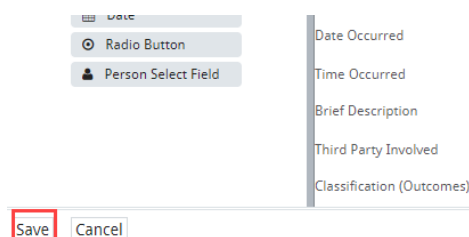
1. Click on the **Radio Button** and drag across to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add field help** to add information to assist in the completion of the text field.
4. Select **Yes** or **No** to make the field mandatory.
5. Select **Add** to enter the Radio Button option.



6. Enter the **Name** of the Radio Button.
7. Enter an **Abbreviation** if required.
8. Select the tick box for **Default** if it is to be the selected option when the form is created.
9. Then select **Ok**.



10. Select **Save** on Form Definition to update the changes to the module.

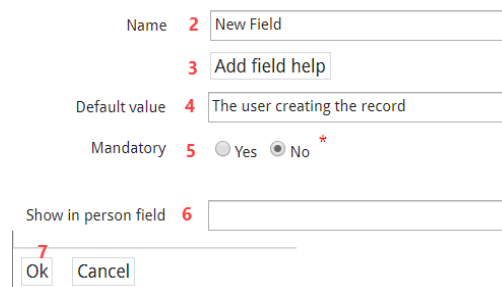


Person Select Field

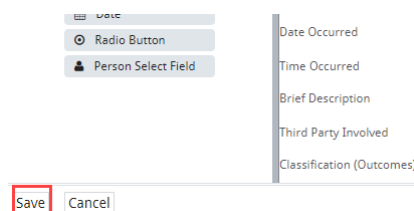
Including the Person Select Field on the form design will give the person completing the form the option to select from a targeted group of Users or Individual ie) A Confidential Monitor or Injury Manager etc. The field can be set to mandatory and a default value displayed.

Add a Person Select Field

1. Select **Person Select Field** button drag to the required location on the form.
2. Enter the **Name** of the Field.
3. Select **Add field help** assists users with the type of content that is required to be entered in the form.
4. Select the **Default Value** if required.
5. Select **Yes** or **No** to make the field mandatory.
6. Select an Option from **Show in person field**.
7. Select **Ok**.



8. Select **Save** to update the changes to the module.



Update an Existing Form Design

Administrators at times may be required to make changes to existing elements with the module form design. This could be to update name labels or delete field options with a form. Once a form has been updated or removed the changes will apply to all new records.

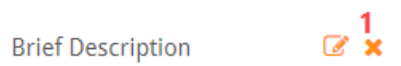
Edit Form Fields

1. Select the **Edit Button** (pad and pen icon) on the required item to edit.
2. Make the required changes and then select **Ok**.



Delete Form Fields

1. Select the **Delete** button (cross icon) on the required item to edit.
2. Select **Save** to update the changes to all new forms for the corresponding module.



By deleting fields any data that was previously associated will also be deleted. It is important to note that in the event a field is deleted by mistake there will be costs applied to restore the field and data.

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Revision History

Document Completed 7th July 2018

Version	Revision Date	Description	Author
1	07/07/2018		Kathryn Spencer
2	09/11/2018	Format, layout and content changes	Kathryn Spencer