

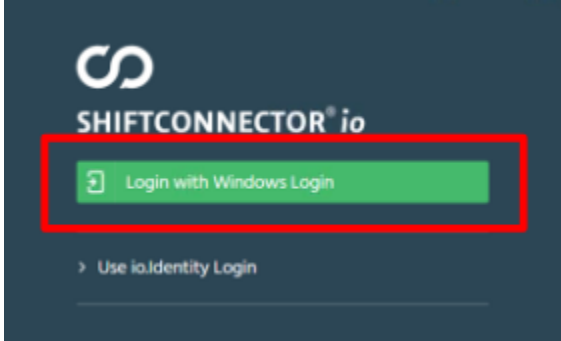
Create a new form

Before creating a form, it is important to first create all the field that will be present in your form. If you need more information of how to do that, please check this link: [Create a new item](#).

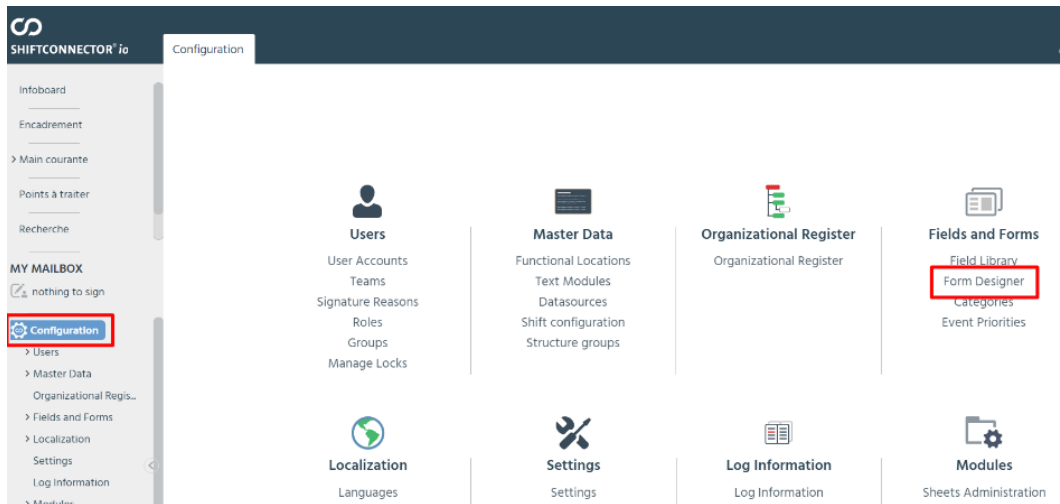
Now that all your field have been created, lets start to create our form.

You have three types of form: the events, the tasks and the directives, each one correspond to the primary forms. Here are the steps to follow:

1. Login to Shiftconnector with your Solvay ID

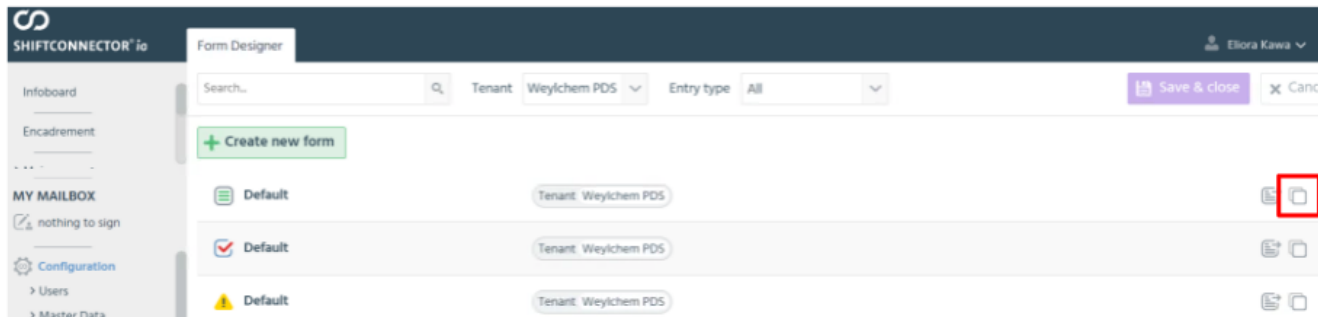


2. Go to configuration Form designer




There you will find a library of forms. It is advised to not create form from scratch but to duplicate defaults forms

3. Duplicate one of the default form or another one if you prefer



4. Change the form name

5. Remove or make invisible the field that you do not want to keep. It is advised to not remove the global field (the one that have a  in front of their name, but to just uncheck their visibility).

System name ^	Name	Type	Visible in auto ev...	Visible in auto ev...	Visible ...
AssignedShiftbooks	Assigned Shiftbooks	ShiftbookSelect	<input type="checkbox"/>	<input type="checkbox"/>	uncheck <input checked="" type="checkbox"/>  
Attachments	Attachments	Attachment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>  

6. Add the field that are missing





SHIFTCONNECTOR[®] io Form Designer Elora Kawa

Infoboard Encadrement MY MAILBOX nothing to sign Configuration Users Master Data Organizational Regis... Fields and Forms Field Library **Form Designer**

Type: Events Form name: Copy of Default Tenant: Weylchem PDS OK C

Designer Settings Attach buttons

+ Add field

System name ^	Name	Type	Visible in auto ev...	Visible in auto ev...	Visible ...
AssignedShiftbooks	Assigned Shiftbooks	ShiftbookSelect	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>  
Attachments	Attachments	Attachment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>  

Detail view Auto event task Auto event directive

Action/Solution Add field

StandardText | SC_Failure_Action_Solution

Assigned Shiftbooks Remove

ShiftbookSelect | AssignedShiftbooks


Attachments Remove

Attachment | Attachments

Batch Add field

StandardText | Batch

Bottleneck Status

search... 

Close

Field Library

7. If needed change the parameter of the field, this will have an effect only on this specific form and not on every form on which the field is present.

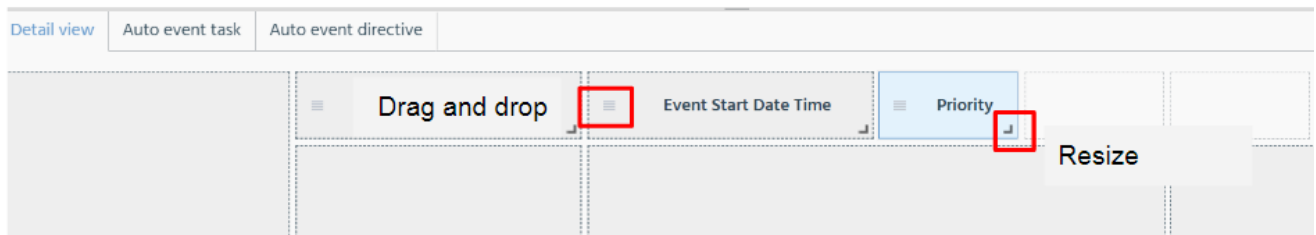
+ Add field

System name ^	Name	Type	Visible in auto ev...	Visible in auto ev...	Visible ...
AssignedShiftbooks	Assigned Shiftbooks	ShiftbookSelect	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>  
Attachments	Attachments	Attachment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>  

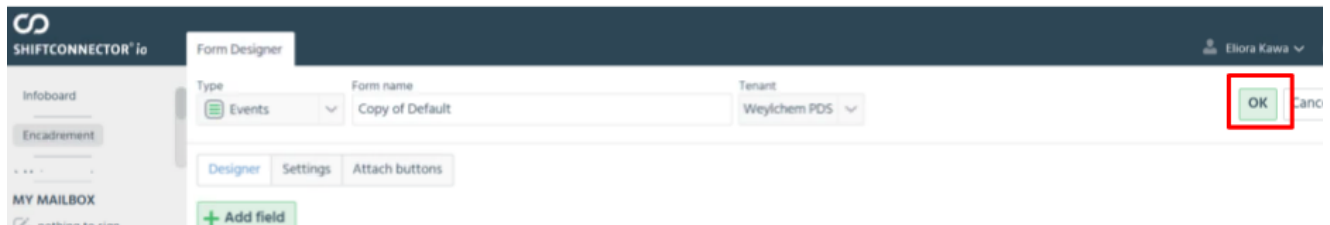
- Use name of business field
 - Name
 - Priority
- Use defaults of business field
 - Copy value from parent element
 - Default status
 - normal
- Use validation rules of business field
 - Is mandatory
 - Only editable in creation mode
 - Is read only field
 - Selected per default
 - Use checkbox for create

The parameters that you can change are different for each type of field.

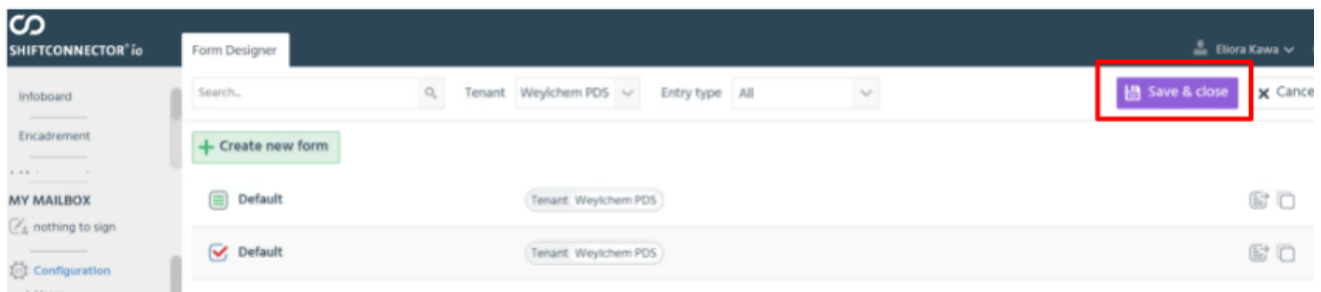
8. Reorder, the form by dragging and dropping the field. You can also modify the size of each field.



9. As soon as your form is done, click on "OK".

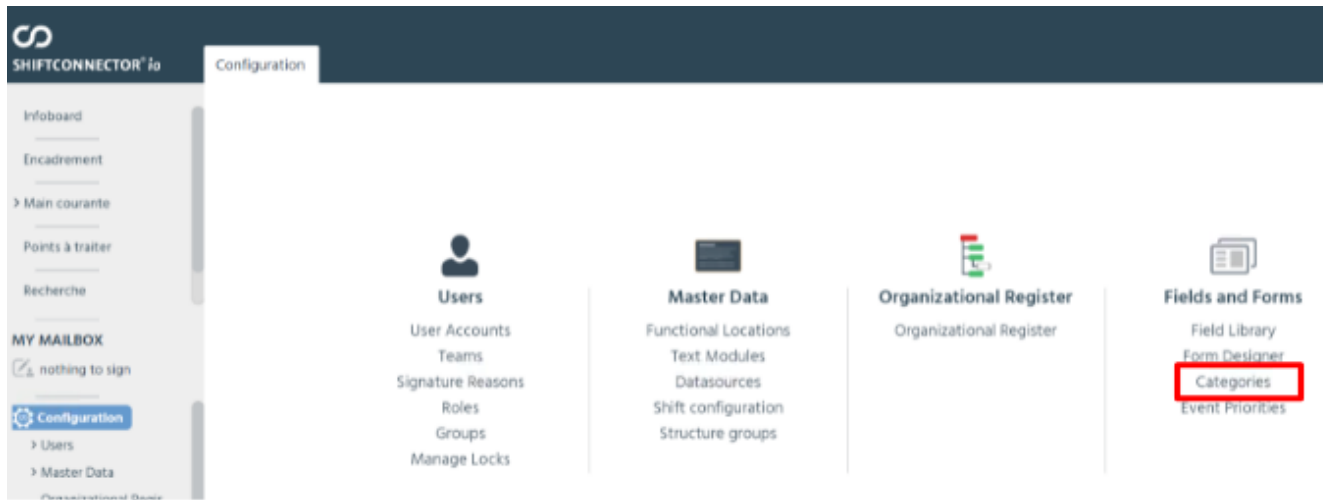


10. Save & close

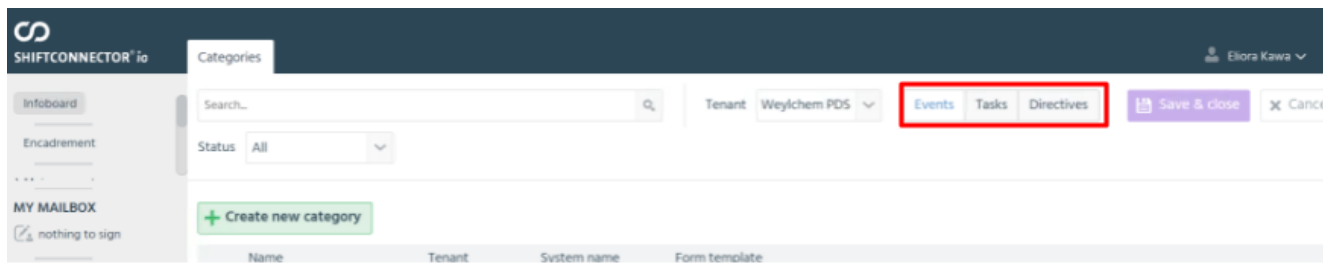


To finally assigned your form to an event/ task/ directive to the navigation tab, you have to create a category.

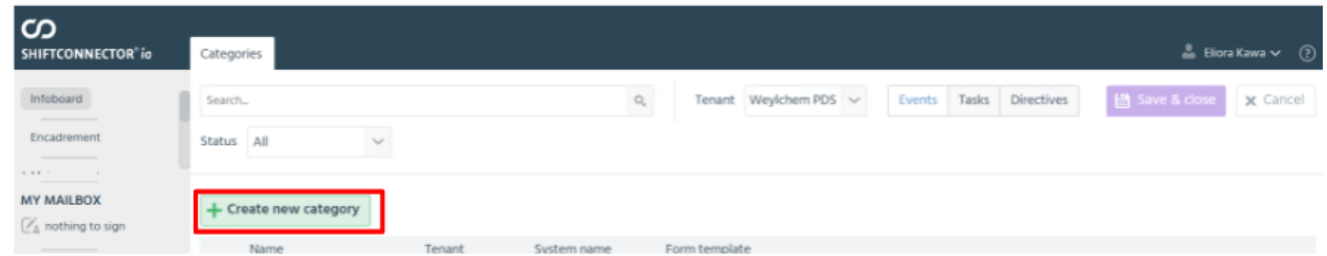
11. Configuration categories



12. Choose the type of category you would like to create: Events/ Tasks/ Directives



13. Create new category



14. Give a name to the category and select your form.

The screenshot shows the 'New Category' dialog box. It has a title bar with 'OK' and 'Cancel' buttons. The dialog contains the following fields:

- Status: Active (with a checkmark icon and a 'Delete' button)
- Type: Events (with a dropdown arrow)
- Tenant: Weylchem PDS (with a dropdown arrow)
- Name: (with a red background and a placeholder 'Name')
- Form template: (with a red background and a dropdown arrow)
- Assign to structure item: No assignments

Once again, you will have the opportunity to change the settings of the field present in the form.

Rapporte de poste OK Cancel

Status: Active Delete

Type: Events

Tenant: Waychem PDS

Name: Rapporte de poste

Form template: Default_Rapport_de_Poste

Fields Settings

- Assigned Shiftbooks
- Attachments
- Category
- Description
- Event Start Date Time
- Priority
- Functional Location

15. Optional: You can select the structure item (correspond to the navigation items)

Rapporte de poste OK Cancel

Status: Active Delete

Type: Events

Tenant: Waychem PDS

Name: Rapporte de poste

Form template: Default_Rapport_de_Poste

- Event Start Date Time
- Priority
- Functional Location
- Description
- Personnes
- Quart

Assign to structure item
No assignments

Rapporte de poste OK Cancel

Status: Active Events

Type: Events

Tenant: Waychem PDS

Name: Rapporte de poste

Assign to structure item

- Dashboard
- Attachment
- Main course
- Photo à traiter
- Recherche
- Tool improvements

Clear selection Select All

OK Cancel

Tick the boxes

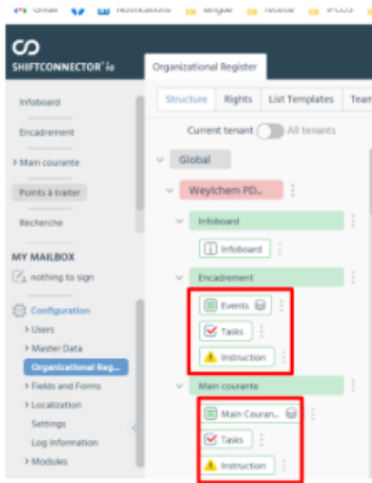
16. OK

17. Save & close

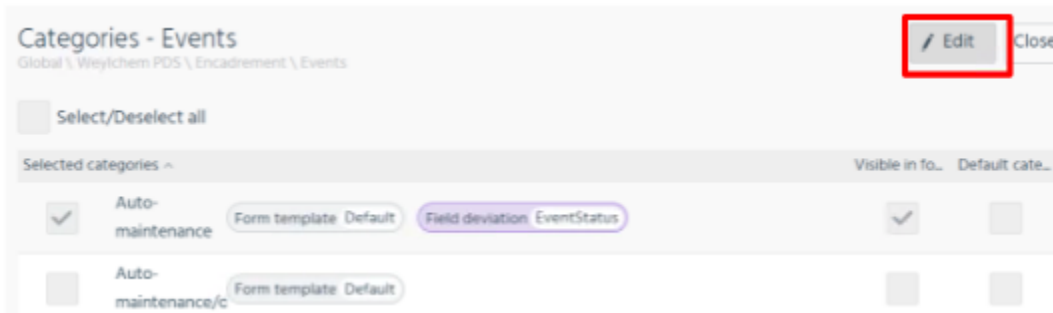
18. Configuration Organizational Register.

19. Select the categories tab

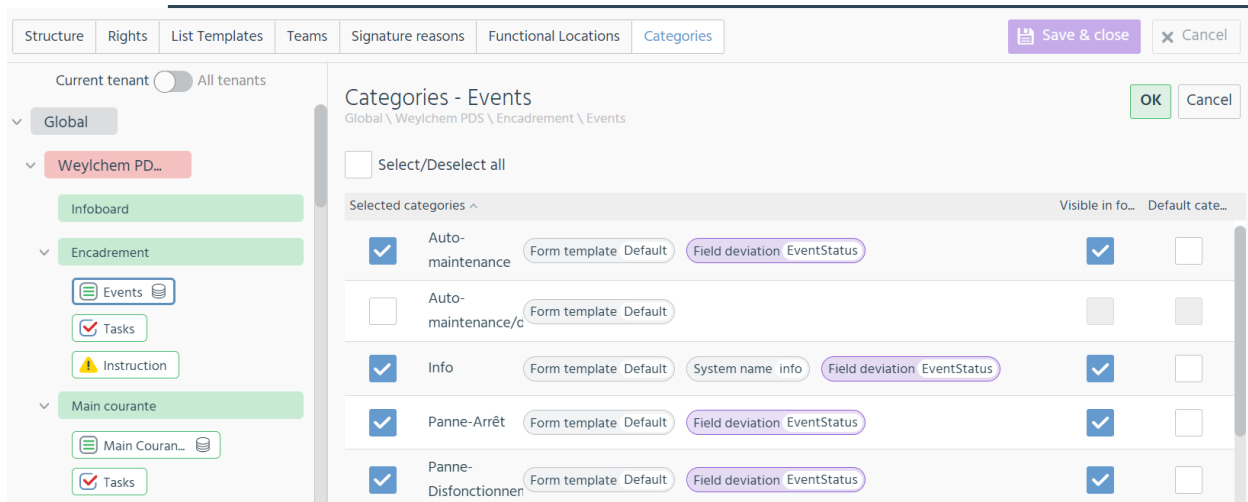
20. Select the navigation item on which you want to assign the form



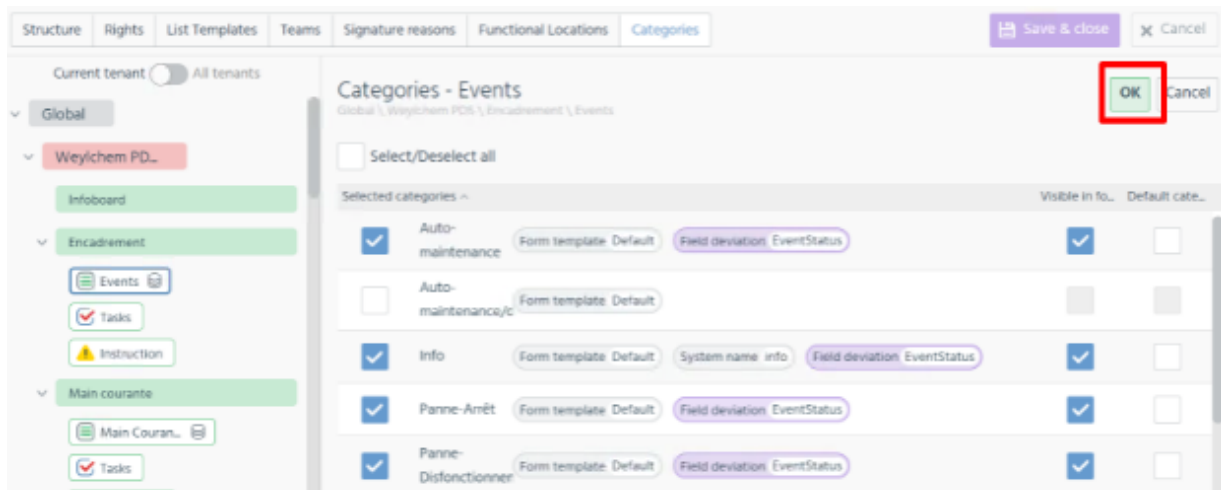
21. Edit



22. Tick the form that should appear in the category field of the form. (if there is only one category, it is not required to check visible form. You just need to select the category and make it as the default category)



23. OK



24. Save & close

