Trimble Unity Construct - Forms Guide

September 2024

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About Forms

Forms are customizable, electronic input screens used to record specific data elements. Your account administrator can create any number of forms necessary to support your internal business processes. Forms are created according to business processes and may be routed to various team members or roles on your projects. Workflow forms can be routed to a number of different user roles, across organizations, and externally to non Trimble Unity Construct users as well. Unlike paper forms, electronic forms in Trimble Unity Construct allow you to check on the status of forms, including whose court the form might be in, by simply logging into Trimble Unity Construct and going to the Project Forms page. This enhances communication among team members, as there is little room for error. Due dates, comments, attachments, requests, and field information are all easily accessible by all parties involved in a form's life cycle. Form data and usage information can also be pulled into reports by anyone who has access to the form.

Types of Forms

There are two form types available in Trimble Unity Construct:

- **Static Forms (Non-Routable)**: Static forms are one-way communications to team members, often communicating the procedural information status of specific items. Static forms are mainly for informational purposes. Team members can be notified of static postings using the copy (CC) functionality, but static postings are not routed.

  Examples of static forms include:

  - Daily Log Reports
  - Accident Reports
  - Field Observations
  - Warranty Trackers

- **Workflow Forms (Routable)**: Workflow forms are routed communications to team members, used when a specific response is necessary from the recipient(s). For example, Workflow forms are used to send someone an item that requires approval or a written answer to a question. Workflow forms use the ball in court mechanism to indicate who is currently responsible for taking action on an item. When the form is in your court, you can edit the data fields in the form and then send the form on to the next person in the route. The form will then land in the next person's court. When a workflow is initiated, the recipient and all users cc'd receive e-mail notification of the posting and all subsequent activity on the workflow.

  Examples of workflow forms include:

  - Transmittals
  - Field Reports
  - Submittals
  - Design Reviews
  - Addenda
  - Project Issues
  - Requests For Information

- Change Orders
- Architectural Supplemental Instructions
- Punch Lists
- Daily Inspections
- Contract Approvals

Access the Forms Page

You are able to view forms across your account and also within a project.

To access forms if you are not in a project

1. Click the **Forms** tab located on the Top Navigation Tabs.
2. Choose a project from the **All Projects** menu.

   The Project Forms page is displayed.
3. Use the filter to search for your forms.

To access forms if you are in a project

1. Click the **Forms** link located in the Project Menu.

   The Project Forms page is displayed.
2. Use the filter to search for your filter.

Working with Forms

Your security permission will determine the actions that you are allowed to perform with forms.

- Related topics

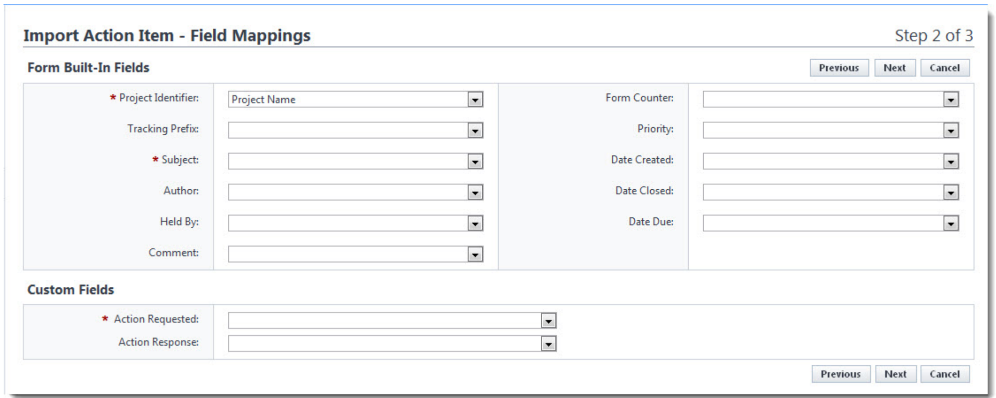
Import Form Instances

Depending on your account settings, you may or may not be able to import forms. The Forms import capability must be enabled by an e-Builder Support team member. For more information, please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

Importing forms allow you to import form instances of a particular form type. This helps administrators save time by eliminating data entry efforts. Imports can be of new or existing forms. For existing forms, simply add the project name, form counter and field details.

Example

e-Builder built-in fields are mapped to the columns of your Excel® spreadsheet. The columns in your import file do not have to match the e-Builder built-in fields exactly, but if they do, the data will automatically populate on the Field Mappings page and you will not have to physically map the fields. All of the built-in fields do not have to be included your import file, but at a minimum, the required fields do. This includes required custom fields as well.

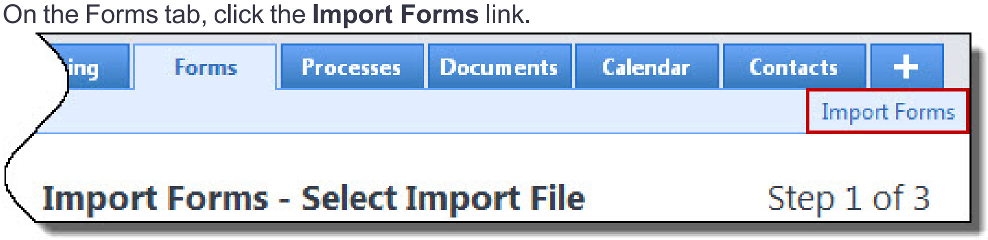


Sample import file of the Action Item form type:

	A	B	C	D	E	F	G	H
1	Project Identifier	Subject	Author	Held By	Priority	Date Created	Name of Requestor	Date of Request:
2	Delray Commons	Fire Extinguishers	Sutton, Andy	Wiley, Mathia	Normal	02.01.2011	Mathia Wiley	02.01.2011
3	Delray Commons	Plumbing Isometrics Do not coincide with required codes	Sutton, Andy	Wiley, Mathia	Normal	05.20.2011	Mathia Wiley	05.20.2011
4	Delray Commons	Need More Information	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011
5	Delray Commons	Emergency Doors	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011
6	Delray Commons	Counter Tops	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011
7	Delray Commons	Removal of Old Carpets	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011

To import form instances

1. Open the Forms page.
2. On the Forms tab, click the **Import Forms** link.



   The Import Forms page is displayed.
3. Complete the required fields.

   For an overview of this page, see Import Forms Page Overview.
4. Click **Next**.
5. Complete the required fields.
6. Map the fields to the columns in the Excel file.
7. Click **Next**.
8. If the file was mapped correctly and there aren't any exceptions or warnings, click **Import**.

   —Or—

   If there are exceptions, the **Import** button will be disabled.
   a. Click the **Exceptions** tab to review the exceptions and make necessary changes to the spread-sheet.
   b. Click **Previous** twice to return to Step 1 and then re-import the file.
9. Click **Finish**.

Fill Out Forms

To initiate a workflow form or fill out a static form

1. Go to the Forms page.
2. Open the form you wish to fill out.
3. Complete the required fields.

   For a description of this page, see Fill Out Form Page Overview.

   > **Note:** Be sure to click through the tabs at the bottom of page, as they might contain required or optional form fields that are not readily apparent.
4. Do any of the following actions:
   - Post the form. An e-mail notification is sent to the recipients of workflow forms and CC'd users of a static form.
   - Save the form as a draft. Draft forms display as a workflow in your court.

Edit Forms

Opened and draft forms can be edited. Also, only some fields can be edited.

To edit a form

1. Go to the Forms page.
2. On the form you wish to edit, make the necessary changes.

   For a description of the fields and buttons on this page, see View/Edit Form Page Overview.
3. Do any of the following actions:
   - Post the form. An e-mail notification is sent to the recipients of workflow forms and CC'd users of a static form.
   - Save the form as a draft. Draft forms display as a workflow in your court.

Comment on Forms

Comments can only be added to open and closed forms, but not forms in draft status. However, an administrator can disable comments from being added on a closed form. Additionally, adding comments is one of the only ways to attach a form to forms that have already been posted.

To comment on a form

1. Go to the Forms page.
2. Open the form you wish to comment on.
3. Click the **Comments** tab.
4. Click **Comment**.
5. *Optional:* Attach files and/or forms:

   > **Note:** The only way to add comments to posted forms is by adding a comment or forwarding the form. You cannot attach forms to posted forms by clicking the Attach Forms tab as you would a draft form.

6. Enter your comment.
7. Click **Add Comment**.

   The comment is added to the form.

Reply to Forms

You are only able to reply to forms that are in your court. By default, when accessing the project’s Forms page, a view of the workflow forms in your court is displayed. If you are on the Project Forms page, use the filter to for workflow in your court'.

To reply to forms

1. Go to the Forms page.
2. Open the form you want to reply to.
3. Complete the required fields.
4. Click **Reply**.

Forward Forms

You have the ability to forward forms that are currently in your court or those that you have initiated.

To forward forms

1. Go to the Forms page.
2. Open the form you want to forward.
3. Complete the required fields.
4. Click **Forward**.
5. Select the recipient or role that you'd like to send the form to.
6. Click **Send**.

Re-open a Closed Form

To re-open a closed Form

1. Go to the Forms page.
2. Open the form you want to re-open.
3. Complete any required field.
4. Click **Re-Open**.
5. *Optional:* Reset the due date.

   > **Note:** The "Notify all participants that form is being re-opened." check box is selected by default. Clear this check box if you do not want to notify participants.

6. Click **Re-Open Form**.

   A status and confirmation message is displayed.

7. Click **Continue**.

Request External Comments

To allow a non-e-Builder license holder to respond to a form, you must request an external comment from them. External comment requests can be requested by email. The message will include the form's detailed information and all attached documents. Recipients will respond through a link in the email. You will be notified via email and this request will also continue to appear in your court until the form is closed.

To request an external comment via email for a new form

1. Go to the Forms page.
2. Click **Fill Out Form**.
3. Select the form you wish to fill out.
4. Enter all required fields.
5. Select the **Request External Comment After Posting** check box.
6. Click **Post Form**.

   The Request External Comment dialog box is displayed.
7. Select **Email** and then click **Next**.
8. Complete the required fields.

   Tip

   When sending an email, use your keyboard to auto-fill and select the desired email addresses. Begin typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.
9. Click **Email Request**.

To request an external comment via email for a form that has already been posted and in your court

1. Go to the Forms page.
2. Click the **Comments** tab.
3. Click **Request External Comment**.

   The Request External Comment dialog box is displayed.
4. Select **Email** and then click **Next**.
5. Complete the required fields.

   Tip

   When sending an email, use your keyboard to auto-fill and select the desired email addresses. Begin typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.
6. Click **Email Request**.

View Forms

View Form / File Attachments

To view form attachments

1. Go to the Forms page.
2. Open the form that contains the attachment you wish to view.
3. To view file attachments, click the **Attached Files** tab.
4. To view form attachments, click the **Attached Forms** tab.

View Form History

A form's history reveals the users that have viewed, commented and made changes to a form [instance] between the time the form was created and closed. This data insures accountability, should tracking or auditing be necessary. You also have the ability to print a record of the history or export the data to an Excel® spreadsheet.

To view a form's history

1. Go to the Project Forms page.

   For more information, see Access the Forms Page.
2. Open the form you wish to view.
3. Click the **History** tab.
4. Optionally, you can take any of the following actions:
   - Click **Print** to print the history record.
   - Click the Excel icon to export the record to Microsoft Excel®.

View Form Field History

A form's field history reveals the users that have modified form fields between the time the form was created and closed. This data insures accountability, should tracking or auditing be necessary. You also have the ability to print a record of the form field history or export the data to an Excel® spreadsheet.

To view a form's field history

1. Go to the Project Forms page.

   For instructions, see Access the Forms Page.
2. Filter for the form.
3. Click the subject of the form.

   The Form Instance page displays.
4. Click the **Form Field History** tab.
5. Optionally, you can take any of the following actions:
   - Click **Print** to print the history record.
   - Click the Excel icon to export the record to Microsoft Excel®.

View Form Permissions

Viewing the permissions of a form allows you to see the roles and individual users that have access to the form, and what their level of access is.

To view the permissions of a particular form

1. Go to the Project Forms page.

   For more information, see Access Project Forms Page.

2. Filter for the form.
3. Click the subject of the form.

   The Form Instance page displays.

4. Click the **Permissions** tab.

Attach Files / Forms to Draft Forms

Follow the steps below to attach files or forms to draft forms.

> **Note:** The only way to attach a form to a posted form is by adding a comment, replying or forwarding the form.

Tip

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to a draft form

1. Go to the Forms page.
2. Open the form to complete or click **Fill Out Form** to open a new form instance.
3. To attach files, click the **Attached Files** tab.
4. Click the **Attached Files** tab.
5. Click **Attach Files**.
6. To upload a file from your computer:
   a. Click **Upload from your Computer**.
   b. Select a destination folder and click **Select**.
   c. Click **Browse** to search for files to upload or drag and drop a file from your computer.
   d. Click **Done**.
7. To select a file from the project’s Documents module:
   a. Click **Select from Documents Module**.
   b. Select the file(s) and click **Attach**.

To attach forms to a form

1. Go to the Forms page.
2. Click the **Attached Forms** tab.
3. Click **Attach Forms**.

   The Attach Forms page is displayed.

4. Filter for the forms you want to see.

   Results are displayed in the table below.

5. Select the check box next to the forms you want to attach.

6. Click **Attach**.

Remove an Attached File or Form

The user who attached the form / file, an administrator or anyone with a manage forms permissions can remove attached files or forms.

To remove an attached file from a form

1. Go to the Forms page.
2. Filter for and then select a form.

   The Forms Instance page is displayed.
3. Click the **Attached Files** tab.
4. Select the check box next to the form you want to remove, and then click **Remove Files**.

   The word ‘Removed’ is displayed in parentheses next to the file name indicating that this file was removed from the form.

   > **Note:** You're able to reattach the same file by clicking the **Reattach** link located underneath the title of the file.

To remove an attached form from a form

1. Go to the Forms page.
2. Filter for and then select a form.

   The Forms Instance page is displayed.
3. Click the **Attached Forms** tab.
4. Select the check box next to the form you want to remove, and then click **Remove Forms**.

   The word ‘Removed’ is displayed in parentheses next to the file name indicating that this file was removed from the form.

   > **Note:** You're able to reattach the same file by clicking the **Reattach** link located underneath the title of the file.

Print Forms

There are two ways that a form instance can be printed in e-Builder; using standard printing or a mail merge template.

Print Forms Using Standard Printing

The standard printing option should be used if you want to print a single form instance and do not wish to use a mail merge template, or print any of the attachments.

To print a form instance

1. Go to the Forms page.
2. Filter for and select the form you'd like to print.
3. Click **Print**.

   A preview of the form is displayed in a separate dialog box.
4. Click **Print**.

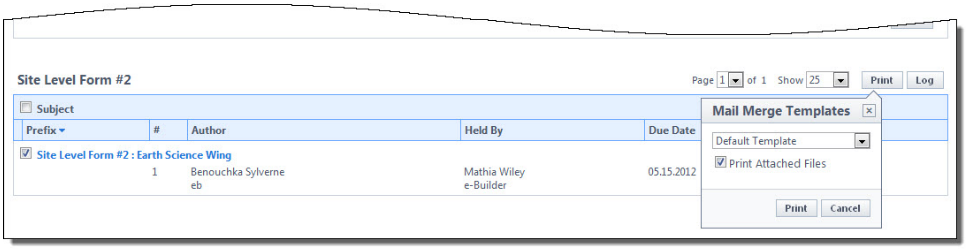
Print Forms Using Mail Merge

Mail merge printing allows you to print multiple forms of a single form type at a time. This option allows you to print using a mail merge template as well as print the attached files.

> **Note:** The Print and Log buttons display only when a specific form type is selected.

To print forms using mail merge

1. Go to the Forms page.
2. In the **Filter Forms** section, click the **Type of Form** drop-down arrow and select a form type.
3. Click **Filter**.
4. Select the check box next to the form you want to print.



5. To print only high level information, click **Log**.

   —Or—

   To print form details and/or attachments, click **Print**. The Mail Merge Templates submenu is displayed.
6. Click the drop-down arrow and select a template.
7. To print the attached files, select the **Print Attached Files** check box.
8. Click **Print**.

Related Topics:

- Add/Edit Form Mail Merge Templates

Forms Page Overview

The Forms page is displayed when the Forms tab is selected on the Top Navigation Tabs. Forms on this page correlate to the selected view.

From the Forms page, you can:

- **Views:** Click to select a view.
- **Edit:** Click to open the Edit View page and make changes to the selected view.
- **Add View:** Opens the Add View page to create a new view.
- **Close Selected Form:** Click to close selected forms. Displays only for views that include open forms.

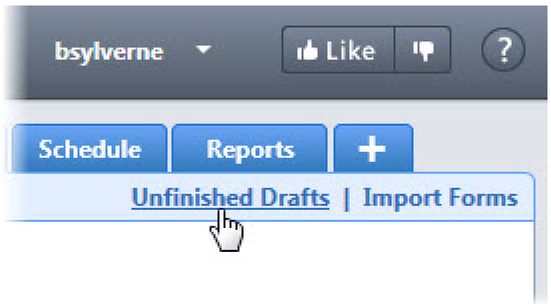
◦ Related topics

Project Forms Page

Project forms are displayed on this page. If you are a member of multiple projects, click the 'Forms for' drop-down to switch between your projects. From this page, you are able to search for, view and fill out project forms. If you are displaying forms of multiple statuses, you will notice that closed, open, and draft forms display differently on the results table. This is to help you quickly identify form statuses at a glance.

Quick Links

- **Unfinished Drafts:** Located in the Quick Links menu in the upper right corner of the page.

  Everyone is able to see their own draft forms. To see the drafts of others, you must have View Draft permission, which is granted at the account level per role. Account and project administrators are also able to view draft forms by default. Those with Create permissions automatically inherit View Draft permission. Draft forms can be viewed from the Unfinished Drafts page and from Project Forms.
- **Import Forms:** Depending on your account settings, you may or may not be able to import forms. The Forms import capability must be enabled by an e-Builder Support team member. For more information, please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

Fill Out Forms

- **Fill Out Selected Form Type:** Displays only when there is a selection in the Type of Form field. Click to fill out the selected form type.
- **Fill Out Form**: Click to open the Fill Out Form page and select the type of form you want to complete.

Filter Forms

The filter has a number of components to help you find the forms you're looking for.

- **Search In:** These options help you narrow search results. Search for forms that you've initiated, those in your court or both.
- **Type of Form:** Click to filter for all form types or specific workflow or static forms by name. If a status option is selected in combination with the All option, you will filter for all forms of the selected status. If a status is not selected, All will filter for all forms of every status that you have the permissions to see.
  - **Draft**: Only users in roles with View Draft permissions, account and project administrators are authorized to see draft forms. Draft forms can also be managed from the Unfinished

Drafts page.
    - **Open**: Only users/roles with View permission, account and project administrators are authorized to filter for open forms.
    - **Closed**: Only users/roles with View permission, account and project administrators are authorized to filter for closed forms.

  For more information, see Form Type Permissions Page Overview.
- **Containing Text**: Enter text to search for keywords located in the form details, such as the name, subject or field descriptions.
- **Filter**: Click to filter for select criteria.

Results Table

The title of the results table will change depending on the form type that is selected in the filter.

- **Page/Show**: Click to select the page number of results to jump to. / Click to select the number of results to display per page.
- **Print**: Prints form details and / or attachments.
- **Log**: Prints only high level information.

  > **Note:** Data opens in a Microsoft Word® or PDF document, as specified by the account or project administrator. You are able to print using the default template or a custom template if one has been created. See Add/Edit For Mail Merge Templates.
- **Subject:** : Displays the subject of the form. Click to open the form instance in a separate window, and view or take action on the form.
- **Prefix:** Displays the prefix of the form if one exists. A prefix is an additional identifier by which to track and access forms. An example is the contractor's tracking number.
- **#:** Displays the form instance number. This field allows you gauge how often a form type is being used.
- **Author:** Displays the name of the person who created the form.
- **Held By**: Displays the name of the person whose court the form is in.
- **Due Date**: Displays the date a workflow form is due. NA is displayed for static forms, as they do not have a due date.
- **Status:** Displays the amount of days before or after the workflow form is due in relation to the due date. Due dates will skip weekends & exceptions depending on the calendar exceptions.

Fill Out Form Page

This dialog box is displayed when you fill out a form. If you are presented with a list of workflow forms, select one from the list.

For more details on how to access the Fill Out Form page, see Fill Out Forms .

Toolbar Buttons

- **Post Form**: Click to send the form to select recipients.
- **Save Draft**: Click to save a draft. Drafts forms can be retrieved by filtering for Forms in your court on the Forms and Project Forms page.

  To learn more about managing draft forms, see View Draft Forms Permission.
- **Delete Draft**: This button is only available for account administrators, the form initiator and users with the permissions to access draft forms. For more information on managing draft forms, see View Draft forms permission.

  > **Note:** For a description of each of the common toolbar buttons, see Toolbar Buttons.

Field Description

- **Project**: Displays the name of the project you are filling out this form for.
- **Project Number**: Displays the project number, if available.

  To learn more or for instructions, see Create Project Number Custom Field.
- **Form Type**: Displays the type of form you are filling out.
- **Author**: Displays the name of the person that created the form.
- **Counter Prefix:** Displays the prefix of the form if one exists. A prefix is an additional identifier by which to track and access forms. An example can be a contractor's tracking number.
- **Priority**: Click to select the priority level of the form.
- **Subject**: Enter the subject of the form.
- **Send To:** Displays for workflow forms only. Click to select the recipient.
- **Date Due:** Displays for workflow forms only. Click the calendar icon and select the date that this form should be completed by. You can also type the date in the field.
- **CC:** Select the roles or users to copy on the form. Click the right directional arrow to add users/ roles to the adjacent CC box.

  Tip

  Double-click the role name to view the list of users in the role.
- **Request external comment after posting:** Select to request a comment from an external recipients who is not a licensed Trimble Unity Construct user. External comment requests can be sent via Email. For instructions, see Request External Comments

Tabs

The Attached Files and Attached Forms tabs are displayed by default, but additional tabs are sections of the form and are created by the account administrator.

- **Attached Files:** Click to view or attach files to the form.
- **Attached Forms:** Click to view or attach forms to the form.
- **Attached Viewpoints**: Click to view or attach viewpoints to the form. You might choose to attach viewpoints as supporting information.

Form Instance Page

The Form instance page is displayed when you view an open or closed form. The title of the form is at the top of the page with the instance number appended to the end of it.

Edit Form

Toolbar Buttons

- **Save:** Available only to open forms. Saves any changes.
- **Close:** Closes an open form.
- **Re-open**: Reopens an open form.
- **Copy:** Creates a copy of the form. The new form is displayed and is placed in draft status as a workflow in your court.
- **Fill out form**: Select a new form type to fill out.
- **Post Form:** Sends the form to select recipients.
- **Save Draft**: Saves a draft of the form. Draft forms can be retrieved by filtering for forms in your court on the Forms and Project Forms page.

Form Details

- **Project**: The name of the project you are filling out this form for.
- **Project Number:** The project number, if available. Administrators can decide whether or not to display project numbers. For more information, go to Administration Tools > Projects > Project Settings.
- **Form Type**: The type of form you are viewing or editing.
- **Author**: The name of the person that created the form.
- **Counter Prefix**: The prefix of the form if one exists. A prefix is an additional identifier by which to track and access forms. An example can be a contractor's tracking number.
- **Priority:** The form's priority level.
- **Subject:** The subject of the form. This field is editable for open forms.
- **Date Due**: For closed forms only. Not available for static forms. Click the calendar icon and select a due date. You can also type the date in this field.
- **Date Closed:** For closed forms only. Displays the date and time that the form was closed.

Tabs

The following tabs are displayed by default. Additional tabs are sections of the form created by the author.

- **Comments:** View comments, add comments, or request external comments. All actions that have been taken on the form are also listed on this tab.
- **Attached Files:** View or attach files to the form.
- **Attached Forms:** View or attach forms to the form.
- **Attached To**: Lists the forms that this form is attached to, if any.

- **Meeting Minutes:** Available only if the form was included in a meeting minute. Click to view or open event details.

History

A list of every view and action taken in the particular form instance. This information can be used for auditing and tracking purposes.

Form Field History

Displays a list of the changes made to the form's fields, users that made the changes, and a time stamp of when the change was made. This information can be used for auditing and tracking purposes.

Permissions

Displays the permission settings of the form. This tab is visible to all users. If necessary, administrators can change the permission to all form instances. For more information, see Form Type Permissions Page Overview - Apply permissions to existing forms check box.

Import Forms Page

> **Note:** Depending on your account settings this page may or may not be available to you. The Forms import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

You are taken through a three step wizard when importing forms. A description of each page is below.

For detailed steps or to view a sample import file, see Import Forms.

Step 1 of 3

- **Project Identifier:** Select a Project Identifier. This is a unique ID that will identify which project the form import is for. Project identifiers are entered into e-Builder as required project custom fields. For multiple options, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Project**: Select a project to be used as a template project. Choose a project that includes the form type that you are importing. The import file can include multiple projects. The field below (Form Type) will update with the form types available for the selected project.
- **Form Type:** Select the form type you wish to import.
- **Import as Draft:** Select to import the file as a draft.
- **Send notification to held by users for open forms:** Select to send a notification to users that currently have this form type in their court, letting them know that additional forms of the selected type are going to be added.
- **Browse:** Click to select the import file.

Step 2 of 3

This step maps the fields in your spreadsheet to the default form built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.

Step 3 of 3

- **Preview**: Review the details of the import, whether it was successful or not. If there were errors, details are displayed on the Exceptions tab.
- **Exceptions**: Lists all errors, if any. Click the Export Exceptions button to export details to a spreadsheet.
- **Warnings**: Lists all warning messages, if any.

Unfinished Drafts Page

This page allows account administrators and users with the appropriate permissions to see and take action on draft forms and processes. Draft processes and forms are created for many different reasons. At times, team members do not remember to use a draft process and create a new one. Co-workers who are unable to see the draft processes/forms of others do not know that the draft exists and submits a new process for the same item.

Everyone is able to see their own draft forms, but to see the drafts of others, you must have View Draft permission, which is granted at the account level per role. Account and project administrators are also able to view draft forms by default. Those with Create permissions automatically inherit View Draft permission. You are also able to filter for draft forms from the Project Forms page.

> **Note:**
> Permission settings to view drafts are located in the properties of the form and process. For more information, see:
>
> - View Draft Forms Permission
> - View Draft Processes Permission

Field-level descriptions for this page are located below:

- **Show**: Use this filter to narrow the results in the table below it. All Processes/Forms are selected by default. Make a selection to see drafts for a specific process/form.
- **Show All**: Click to show drafts for all forms/ processes.
- **Project Name:** The name of the project associated with the draft form/process.
- **Form Type:** The name of the form type.
- **Process Type:** The name of the process type.
- **Created By**: The name of the person who created the draft form/ process.
- **Date Created:** The date the draft was created.
- **Type:** Displays whether the form is a workflow or static form. Workflow forms are routable and facilitate two-way communication. Static forms cannot be routed, they are used mainly to disseminate information. To learn more, see About Forms.