Training Guide

FORMS

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Contents

Assigning Access Levels

Before users can attempt to manage forms module for your organisation they must be assigned the correct access levels. Follow the steps below to assign the access levels:

Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

Step 2. Filter the **Personnel** screen according to your requirements.

- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.

Step 4. Select 'Access Levels' from the **Personnel Profile** pane.

Step 5. Click [Edit].

Step 6.   Select the applicable access levels in the **'Forms'** group.

Access Level	Description
Forms > Form Administration > Modify All	Allows users to access the Form Options and the Form Tab Setup.
Forms > Forms > View Self	Allows users to view forms they have submitted.
Forms > Forms > View Selection	Allows uses to view a selection of forms (for a base and department).
Forms > Forms > View All	Allows users to view all forms.
Forms > Forms > Submit Self	Allows users to submit forms.
Forms > Forms > Modify Self	Allows users to modify forms they have submitted.
Forms > Forms > Modify Selection	Allows users to modify a selection of forms (for a base and department).
Forms > Forms > Modify All	Allows users to modify all forms.
Forms > Forms > Delete Self	Allows users to delete forms they have submitted.
Forms > Forms > Delete Selection	Allows users to delete a selection of forms (for a base and department).
Forms > Forms > Delete All	Allows uses to delete all forms.

Step 7.   Click [OK].

Managing Form Types

Air Maestro allows you to create custom forms to capture information relevant to your organisation and/or digitize company forms, so personnel can complete and submit forms electronically.

Before you can commence setting up custom forms, you must create form types (e.g. Clinical Mission, Travel Request, etc.).

Form types are the different forms that can be completed by personnel.

For example, your organisation may have a Travel Request form that personnel complete before they can travel on a company trip.

Once you setup form types, you must setup the form type options and the custom form tabs (including the custom fields in the form tabs) before the form types can be utilized.

Create Form Types

Step 1.   Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Step 2.   Select the **Form Types** tab. All the current form types are listed in the grid.

Step 3.   Click [+Add New].

Step 4.   Complete the form type details as required.

Field	Description
Form Type	Enter the name for the form type. E.g. 'Travel Request'.
Short Name	Enter the short name for the form type. E.g. 'Travel'.
Prefix	Enter the prefix for the form type. E.g. 'T'.
Description	Enter the description for the form type. E.g. 'An employee travel request form that is required to be completed prior to all company related trips'.
Single User Access	Huh?
Active	Select whether the form type is active. If this tick box is unselected, the form type will be inactive and unusable.

Step 5.   Click [✔]. The grid is updated with the new form type.

If any of the default form types do not apply to your organisation, you can disable them by clicking [🖉] and unselecting the Active tick box, followed by clicking [✔].

Step 6.   Repeat **Steps 3-5** to add additional form types.

Setup Form Tabs

Before the form type can be utilized, you must select the form tabs (i.e. the form itself) that personnel are required to complete when submitting a form.

Form tabs can be unique to each form type or common across multiple types. Each form type can have multiple form tabs selected along with display conditions for each tab. The display conditions can be setup to have the form tab only appear when certain conditions have been met.

Step 1.   Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Step 2.   Select the tab corresponding with the form type (e.g. Clinical Mission, Travel Request).

Step 3.   Scroll to the **Form Tabs** pane.

Step 4.   Click {+Add Tab].

Step 5.   Select a form tab from the **Tab Name** drop-down list.

Step 6.   Complete the required options for the selected form tab.

Field	Description
Mandatory	Select whether the form tab is mandatory when completing the form type. If this tick box is unselected, the user completing the form can skip the tab.
Enabled	Select whether the form tab is enabled for this form type. If this tick box is unselected, the tab is not displayed when completing the form.

Step 7.   Click [Add].

Step 8.   Repeat **Steps 4-7** to add additional form tabs to the form type.

*Select the **List Disabled Tabs** tick box if you wish to view/edit/enable a disabled form tab.*

Setup Form Base & Department

Each form that is submitted is associated to a base and department. This allows you to fine control the users who has access to the forms and form types.

Air Maestro allows you to choose whether the form's base and department is linked to the user's base and department (the user who is submitting the form) or if the form's base and department is linked to a custom field list.

Step 1. Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Step 2. Select the tab corresponding with the form type (e.g. Clinical Mission, Travel Request).

Step 3. Scroll to the **Form Tabs** pane.

Step 4. Select the applicable base option from the **Link form's base to** drop-down list.

Step 5. Select the applicable department option from the **Link form's department to** drop-down list.

> The **Link form's base to** drop-down list only brings back custom field lists that are populated by the bases.
> The **Link form's department to** drop-down list only brings back custom field lists that are populated by the departments.

Step 6. Click [Save].

Setup Sign-Off Options

Air Maestro allows you to automatically assign sign-off personnel for each form type. Sign-off personnel are responsible for reviewing the submitted form before the form is closed.

Step 1.　Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Step 2.　Select the tab corresponding with the form type (e.g. Clinical Mission, Travel Request).

Step 3.　Scroll to the **Sign-Off Options** pane.

Step 4.　Click [+Add Sign-Off Personnel].

Step 5.　Select the required sign-off personnel from the **Personnel** drop-down list.

> The list of personnel in the **Personnel** drop-down list are users with **View Selection** or **View All** and/or **Modify Selection** or **Modify All** access levels.

Step 6.　Click [✔]. The grid is updated with the new sign-off personnel.

Step 7.　Repeat **Steps 4-6** to add additional sign-off personnel.

Step 8.　Complete the required sign-off options.

Option	Description
No. of Sign-Offs Required	Enter the number of sign-off personnel that are required to review and sign-off the form before it is closed. For example, if you enter '1' and have nominated '2' sign-off personnel, as soon as one of the sign-off personnel signs off the form – the form progresses to the 'Completed' status and no further sign-offs are required.
Send Request for Sign-Off Emails	Select whether to send an email notification to sign-off personnel prompting them to review and sign-off the completed form.
Automatic Closure After Sign-Offs Have Been Completed	Select whether the completed form automatically closes once all sign-off requirements have been met.
Notify Reporter on Closure	Select whether the user who submitted the form is notified once the form has been closed.

Form Identifier Shown in Emails	Select the text or numeric custom field that is used as the unique form identifier, which is shown in the form email notifications.

Step 9.   Click [Save].

If sign-off personnel have been added and/or removed, you can update all open forms with the new sign-off personnel by clicking [Update Form Sign-Offs].

Setup Access Levels

Air Maestro allows you to specify which users have the option to view and submit specific form types. Access to view and submit forms can be controlled on a base and department level.

For example, you can setup all users in the 'Pilot' department across all bases to view and submit the 'Travel Request' form type. In addition, you can setup all users in each base and department to view and submit the 'Meeting Minutes' form type.

If you have a form type which is specific to a base, you can assign just the users in that base to view and submit the form type.

Step 1.   Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Forms Options

Form Types	Clinical Mission	Meeting Minutes	Travel Request				
							⊹ Add New
Form Type	Short Name	Prefix	Description	Single User Access	Active		
Clinical Mission	Mission	C	Clinical Mission Form	☐	☑	✎	
Meeting Minutes	Meeting	M	Meeting Minutes Form	☐	☑	✎	
Travel Request	Travel	T	Travel Request Form	☐	☑	✎	🗑

Step 2.   Select the tab corresponding with the form type (e.g. Clinical Mission, Travel Request).
Step 3.   Scroll to the **Access Levels** pane.

Access Levels

Form Access: view, modify and submit are set via personnel's access levels or template   Save

⊟☑ Adelaide
⊞☐ Hunter Valley
⊞☐ Mackay
⊞☑ Perth

Step 4.   Expand the base and/or department depending on the personnel.
Step 5.   Select which personnel can have access to this form type from the **Personnel** tick box tree.
Step 6.   Click [Save].

View, Submit and Modify access levels are set via the personnel's access levels or access templates.

Setup Triggered Email Notifications

Air Maestro allows you to setup custom email notifications based on certain custom field conditions.

For example, you can setup a form type to send an email notification to send to the personnel in the Operations Department if a user selects the 'Flight' option from a custom drop-down list.

Step 1. Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Step 2. Select the tab corresponding with the form type (e.g. Clinical Mission, Travel Request).

Step 3. Scroll to the **Triggered Email Notifications** pane.

Step 4. Click [+Add Email Notification].

Step 5. Select the required notification personnel from the **Personnel** drop-down list.

Step 6. Click [Add Condition].

Step 7. Select the applicable custom field from the **Custom Field** drop-down list and complete the filter properties. The setup options differ, depending on the selected custom field type (e.g. text, numeric, etc.).

> 💡 *Selecting the **Or Empty** option adds an additional condition to the custom field where if the field is empty it meets the conditional requirements.*

Step 8. Repeat **Steps 6-7** to add additional custom field conditions.

Step 9. Enter the required body of the email in the **Email Body Setting** text box.

> 💡 *Custom fields can be brought into the email body by dragging and dropping the required custom fields from the **Select Custom Fields** pane to the **Email Body Settings** text box.*

Step 10. Click [✔].

Setup Form Alerts

Air Maestro allows you to setup custom alerts that appear on a user's initial alert screen when a form is submitted.

Step 1. Select **Manage > Setup > Form Options**. The **Form Options** screen is displayed.

Step 2. Select the tab corresponding with the form type (e.g. Clinical Mission, Travel Request).

Step 3. Scroll to the **Form Alert Setup** pane.

Step 4. Click [Add New Record].

Step 5. Enter alert name in the **Alert Title** text box.

Step 6. Complete the required **Recipients** options.

Option	Description
Send to users with home/touring base matching form's base	Select whether to send form alerts to users where their home or touring base matches the submitted form's base.
Send to users with home department matching form's department	Select whether to send form alerts to users where their primary department matches the submitted form's department.
Specific Recipients	Select the specific personnel to receive form alerts.
Limit to access	Select whether to limit form alerts to only send to users who have access to view the form.

*Select both **Send to users with home/touring base matching form/s base** and **Send to users with home department matching form's department** will only send form alerts to users where their home or touring base and primary department matches the submitted form's base and department.*

Step 7. Enter the required body of the form alert in the **Alert Body** text box.

*Custom fields can be brought into the alert body by dragging and dropping the required custom fields from the **Select Custom Fields** pane to the **Alert Body** text box.*

Step 8. Click [✔].

Managing Form Custom Fields

Air Maestro allows you to create custom forms to capture information relevant to your organisation and/or digitize company forms, so personnel can complete and submit forms electronically.

Before you can commence setting up custom tabs and fields for each form type, you must ensure the form type has been created. Refer to **Create Form Types** in this guide for instructions on creating a new form type.

Form tabs can be unique to each form type (e.g. Clinical Mission, Travel Request, etc.) or common to multiple form types.

Create Form Tab

Step 1.   Select **Manage > Setup > Form Tab Setup**. The **Form Tab Setup** screen is displayed and all the current tabs are listed in the grid.

Step 2.   Click [+Add Tab]. A new row is displayed in the grid.

Step 3.   Complete the tab details as required.

*The **Mandatory**, **Send To Authority** and **Enabled** tick boxes are the default values for the tab and can be altered for each form type to suit individual forms.*

Field	Description
Tab Name	Enter a unique identifier for the tab. For example, if you are creating a tab which is used only for a 'Travel Request' form type and relates to accommodation, you may name the tab 'accommodation_details'.
Display Name	Enter the name that is displayed for the tab. For example, 'Accommodation Details'.

Mandatory	Select whether the tab is mandatory when completing the form. If this tick box is unselected, the user submitting the form can skip the tab.
Send To Authority	Select whether the tab is sent to the authorities, when given the option. If this tick box is unselected, the information on this tab is not sent to the authorities.

Step 1.   Click [✔]. The grid is updated with the new tab.
Step 2.   Select the newly created tab in the **Select Tab** drop-down list.
Step 3.   [Add New Field].

> *You must create a group prior to setting up new fields for the tab. By setting up a group, you can select the layout options for the fields within that group.*

Step 4.   Select **'Group'** from the **Control Type** drop-down list.
Step 5.   Enter the group name in the **Control Name** text box. This name is used to store the custom group field in the database. Special characters such as (?,/ etc) are not allowed in this field.
Step 6.   Enter the group label in the **Control Label** text box. This label is displayed to the user submitting the form.
Step 7.   Select the **Border** tick box to include a border around the group field.
Step 8.   Select the **Display Label** tick box to include the label entered in the **Control Label** text box for the group field.

Step 9.   Complete the **Options** pane for the group as required.

Field	Description
Display Mode	Select the display mode for the group field. The 'Flow' display mode attempts to fit all the custom fields as close together and as neatly as possible. The 'Table' display mode displays each custom field one after another depending on the direction.
Direction	Select the direction in which the custom fields are displayed.
Number of Columns	Select the number of columns that are contained within this group.
Label Width	Enter the width of each field label within this group.
Alignment	Select the required alignment of fields within this group.
Display Options	Select the display option for the group field.

Step 10. Click [Insert]. The grid is updated with the new group.

Step 11. Click [🔍] or use the **Hierarchy** drop-down list to view/expand the custom field group.

Step 12. Click [Add New Field] to add a custom field to the group.

Step 13. Select the required field type from the **Control Type** drop-down list.

Field	Description
Aircraft	Displays a drop-down list of every aircraft within the system.
Autonumber	Displays an automatically generated number starting from a base number and prefix.
Calculated Field	Displays a calculated value based on a formula involving other custom fields. For example, you may create an 'Age' calculated field, which outputs a numeric value based on an entry in a 'Date of Birth' custom field.
Checkbox	Displays a tick box that enables the user to select from true/false or yes/no options.
Checkbox List	Displays multiple tick boxes that enable the user to select one or more items.
Contact Picker	Displays a selectable list of contacts as entered in the contact register (**Operations > People > Contacts**).
Cumulative Time	Displays a text box which enables the user to enter an amount of time.
Date Control	Displays a picker that enables the user to select a date.
Date Time	Displays a picker that enables the user to select a date and time.
Drop-Down List	Displays a predefined list that enables the user to select a single item from the list.
Group	Groups multiple custom fields under a single heading.
Label	Displays a line of text.
Nested Drop Down List	Displays a series of interconnected drop down lists (up to 3). Typically used for location data (Country, State, Suburb).
Numeric	Displays a text box which enables the user to enter numerical data.
Personnel	Displays a drop-down list of all personnel within the system and when a user is selected, further information is displayed about the selected user (Contact Details, Company Details, Pilot Details or Crewmen Details).
Personnel Picker	Displays a list of personnel names currently active in Air Maestro by Department, Base/Department, Base or Name.
Radio Button List	Displays multiple radio buttons that enable the user to select a mutually exclusive option.
Text	Displays a text box which enables the user to enter text data.
Time	Displays a text box which enables the user to enter time data.

Tree	Displays a hierarchal tree structure.
Upload	Displays the upload control allowing users to upload files.

Step 14. Complete the field options with the required settings.

Field	Description
Control Name	Enter the unique identifier for the custom field in the **Control Name** text box. This name is used to store the custom field in the database. Special characters such as (?,/ etc) are not allowed in this field.
Control Label	Enter the display name for the custom field in the **Control Label** text box. For example, you may enter a more descriptive name than that entered in the **Control Name** field as this field is displayed in the interface.
Border	Select the **Border** tick box to include a border around the field.
Display Label	Select the **Display Label** tick box to include the label entered in the **Control Label** text box for the field.

Step 15. Complete the **Options** pane for the custom field as required. The options vary according to the selected custom field. For example, for the 'Drop Down List' control type, you must specify if the field is required, the list items and if the field is always displayed. For the 'Text' control type, you must specify if the field is required, if a multi-line text box is required, the dimensions of the multi-line text box (if applicable) and if the field is always displayed.

> *The **Display Options** field allows you to specify when the field must be displayed. The default is 'Always', but if you click the 'Always' text a dialog box is displayed which allows you to set the view rules for the field. For example, if you had a field for 'Delays' you may wish to display a 'Description' text box only when the 'Delays' field is selected.*

Step 16. Click [Insert]. The grid is updated with the new custom field.

> *A preview of the custom field is available in the **Preview** pane. To modify the field, click [✎], edit the required options and click [Update].*

Step 17. Click [🔍] or use the **Hierarchy** drop-down list to view/expand the custom field group. To add additional custom fields within the group field, repeat **Steps 15-19**.

Step 18. Select **root** from the **Hierarchy** drop-down list to view/retract the custom field group and to add additional custom fields outside of group field.