



Quick Setup Guide

Form Versioning

2.16

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(This document was last revised on March 13, 2024)

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How to setup Form Versioning

OBJECTIVE: This document is a quick reference guide on how to setup and manage Form Versioning for both back-end and front-end users

Example: Organizations may want to manage different versions of the same form. Any changes to a form would require only changing to create a new version, not an entirely new form. Changes to versions can be made without altering the ability to analyze all submissions of a form together. The form versioning process will be unobtrusive to the end user.

First off, let's see how data will be set up in **Admin App...**

WHO WILL DO THIS? A back-end user with access to the Admin app, possibly someone in HR who oversees the Form Builder, Form Library Items and Form Submission Manager. This type of user will build/create the form, the form library item and have access to view/export and analyze form submissions.

Form Builder – Version 1

Log on to the Admin application and navigate to Library > Form Builder.

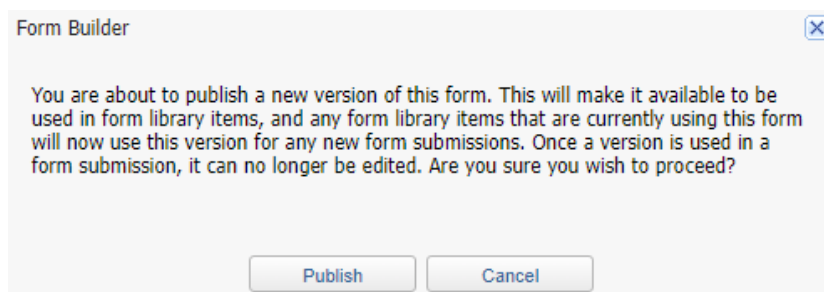
The Form Builder menu area now has a Versions section on the Form tab. It includes:

- The Version # field
- *Other Versions* button
- *Create a new version of this form* button
- *Not yet published / Published on (date) by (user)* notice and *Publish this version* button
- *Version Notes* free text field

The screenshot displays the Form Builder interface for 'Vehicle Maintenance Form 2024'. The 'Versions' section is highlighted with an orange box, showing 'Version: 1', 'Not yet published', and a 'Publish this version' button. A context menu is open over the 'Create new version of this form' button, showing options like 'Create new form', 'Create new version of this form', 'Create new section', 'Create new section copy', and 'Create new section reference'.

When creating a new form, the version number starts at 1 by default and is “*Not yet published*”. Consider a form that is “*Not yet published*” to be a form in draft mode. A form being in draft mode means it is not yet available to be used in Form Library Items.

When the form is ready to make available to users click the “*Publish this version*”, a pop-up warning message is displayed:

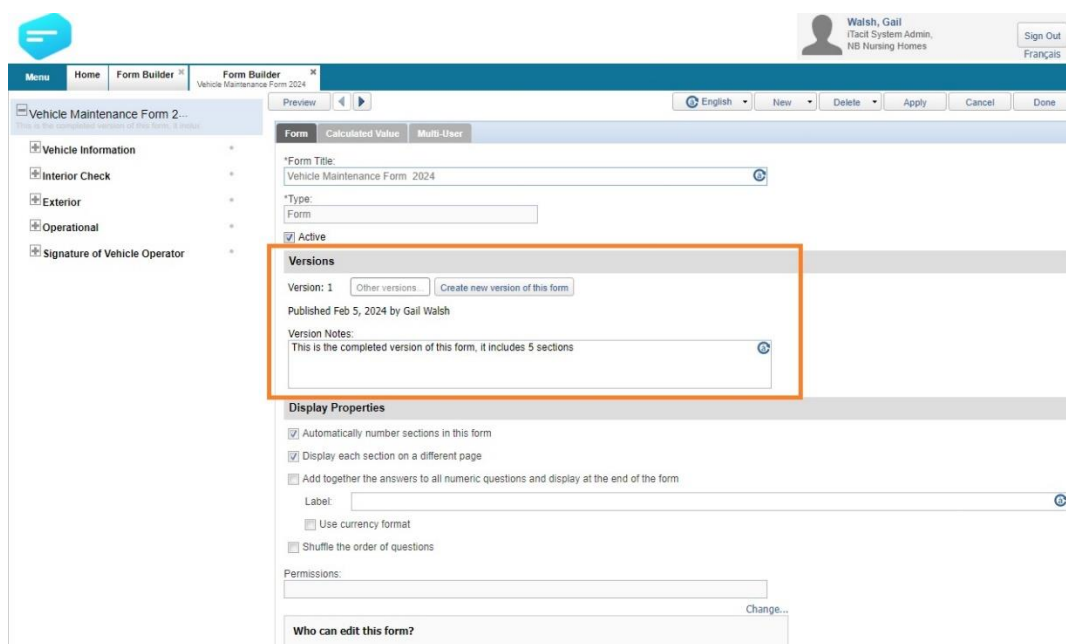


Form Builder

You are about to publish a new version of this form. This will make it available to be used in form library items, and any form library items that are currently using this form will now use this version for any new form submissions. Once a version is used in a form submission, it can no longer be edited. Are you sure you wish to proceed?

[Publish](#) [Cancel](#)

Selecting the “*Publish*” button saves the form version and activates the “*Published on (date) by (user)*” notice. The date the form version was published and the name of user that published version populate the notice. Users can also add to Version Notes at any time.



The screenshot shows the Form Builder interface for 'Vehicle Maintenance Form 2024'. The 'Versions' section is highlighted with an orange box. It displays 'Version: 1' with a link to 'Other versions...' and a button to 'Create new version of this form'. Below this, it states 'Published Feb 5, 2024 by Gail Walsh'. The 'Version Notes' section contains the text 'This is the completed version of this form. It includes 5 sections'. The 'Display Properties' section includes checkboxes for 'Automatically number sections in this form', 'Display each section on a different page', 'Add together the answers to all numeric questions and display at the end of the form', 'Use currency format', and 'Shuffle the order of questions'. The 'Permissions' section has a 'Label' field and a 'Who can edit this form?' section with a 'Change...' link.

This form version is published and is now available to be used in a Form Library item.

Walsh, Gail
Itacit System Admin,
NB Nursing Homes

Sign Out
Français

Menu Home Form Builder Form Builder Vehicle Maintenance Form - DO NOT MODIFY (Copy) Form Library Items Form Library Item Vehicle Maintenance Form 2024

English New Delete Action Apply Done

Form Library Item Topics Schedule Assignment Notifications Documents Contacts

*Name: Vehicle Maintenance Form 2024

Code:

*Uses Form: Vehicle Maintenance Form 2024

Subject:

- ☒ This form is about the assignee
- ☐ This form is about someone else
- ☐ This form is about a Form Subject defined in the Form Builder:

Active: ☒

Description: Paragraph B I U [List Icons]

Permissions:

Show in Library: ☒
 Show in employee record: ☐
 Show in user profile: ☐
 Show in My Team Activities: ☒
 Allow Attachments: ☐
 Allow Notes: ☐
 Allow employees to re-open forms they submitted: ☐

Scoring

Display scoring information for this form when reviewing: ☐
 Allow employees to view scores on completed forms they submitted: ☐

Multi-User Form

Allow the primary assignee to see the current assignee: ☐

Image

Upload Clear

Once the current version of a form is used in a form submission (user(s) have completed a form), the Form Builder Version section will display an indicator below the Version # that the form version is in use.

Walsh, Gail
Itacit System Admin,
NB Nursing Homes

Sign Out
Français

Menu Home Form Builder Form Builder Vehicle Maintenance Form 2024

English New Delete Apply Cancel Done

Vehicle Maintenance Form 2024

Vehicle Information

Vehicle #: 0

License #: 0

Vehicle Operator Name: 0

Interior Check

Exterior

Operational

Signature of Vehicle Operator

Form Calculated Value Multi-User

*Form Title: Vehicle Maintenance Form 2024

*Type: Form

☒ Active

Versions

Version: 1 Other versions Create new version of this form

This form version is in use in form submissions

Published Feb 5, 2024 by Gail Walsh

Version Notes: This is the completed version of this form, it includes 5 sections

Display Properties

☒ Automatically number sections in this form
☒ Display each section on a different page
☐ Add together the answers to all numeric questions and display at the end of the form

Label:

☐ Use currency format

☐ Shuffle the order of questions

Permissions:

Form Builder – Creating New Versions

Clicking the button “*Create new version of this form*”:

The screenshot shows the Form Builder interface for 'Vehicle Maintenance Form 2024'. The left sidebar lists sections: Vehicle Information, Interior Check, Exterior, Operational, and Signature of Vehicle Operator. The main panel has tabs for Form, Calculated Value, and Multi-User. The 'Form' tab is active, showing fields for Form Title (Vehicle Maintenance Form 2024), Type (Form), and Active (checked). Below these is the 'Versions' section, which displays 'Version: 2' and a button 'Create new version of this form'. A message states 'Other versions of this form are in use in form submissions' and 'Not yet published', with a 'Publish this version' button. The 'Display Properties' section includes checkboxes for 'Automatically number sections in this form', 'Display each section on a different page', 'Add together the answers to all numeric questions and display at the end of the form', 'Use currency format', and 'Shuffle the order of questions'. The 'Permissions' section has a dropdown menu set to 'Change...'. Arrows point to the 'Create new version of this form' button and the 'Publish this version' button.

- The Version number increases
- The “*Other versions of this form are in use in form submissions*” notice is displayed
- The “*Not yet published*” notice and “*Publish this version*” button are displayed

Make any required changes to the form, for example: add a new section and question to the form and click ‘*Apply*’ to save the version.

Vehicle Maintenance Form 2024

Vehicle Information

Interior Check

Exterior

Operational

Signature of Vehicle Operator

Date and Time Stamp

Please enter the date and time ... 0

*Question:

Paragraph

Please enter the date and time of completion

Required: ☒ If this question is not required and has a score, it will be treated like a bonus question.

Date and Time

Allow this question to be

☐ Copied (can be edited in other forms)

☐ Referenced (cannot be edited in other forms)

☐ Searchable in Analytics / Usable as a Form Subject

Label for search field:

The form is still displaying the “Not yet published” notice, select the “Publish this version” button

Vehicle Maintenance Form 2024

Vehicle Information

Interior Check

Exterior

Operational

Signature of Vehicle Operator

Date and Time Stamp

Please enter the date and time ... 0

Form

Vehicle Maintenance Form 2024

Type: Form

Active

Versions

Version: 2

Other versions of this form are in use in form submissions

Not yet published

Publish this version

Version Notes:

Version 2 created to add a Date and Time stamp to the form

Display Properties

Automatically number sections in this form

Display each section on a different page

Add together the answers to all numeric questions and display at the end of the form

Label:

Use currency format

Shuffle the order of questions

Permissions:

Who can edit this form?

Open - Access restrictions have not been applied

Who can use this form?

Open - Access restrictions have not been applied

Because this form has other versions that have submissions against them, the following pop-up window is displayed with the following warning:

Form Builder

You are about to publish a new version of this form, and there are existing submissions that use it.

- Click "New Submissions Only" to enable this version for any new form submissions going forward.
- Click "New and Current Submissions" to enable this version for any new form submissions and to make this the version in use for any current active submissions for which no one has completed their work yet.
- Click "Cancel" to cancel publishing the new version and return to editing it.

Click the *"New Submissions Only"* button to enable assignment this version of the form for new submissions only.

Click the *"New and Current Submissions"* button to enable assignment of this version of the form to both new and current submissions (effectively propagating changes to in-flight assignments).

Version 2 of the form is now published.

Vehicle Maintenance Form 2024

Form Title: Vehicle Maintenance Form 2024

Type: Form

☒ Active

Versions

Version: 2

Other versions of this form are in use in form submissions

Not yet published

Version Notes:

Display Properties

☒ Automatically number sections in this form

☒ Display each section on a different page

☐ Add together the answers to all numeric questions and display at the end of the form

Label:

☐ Use currency format

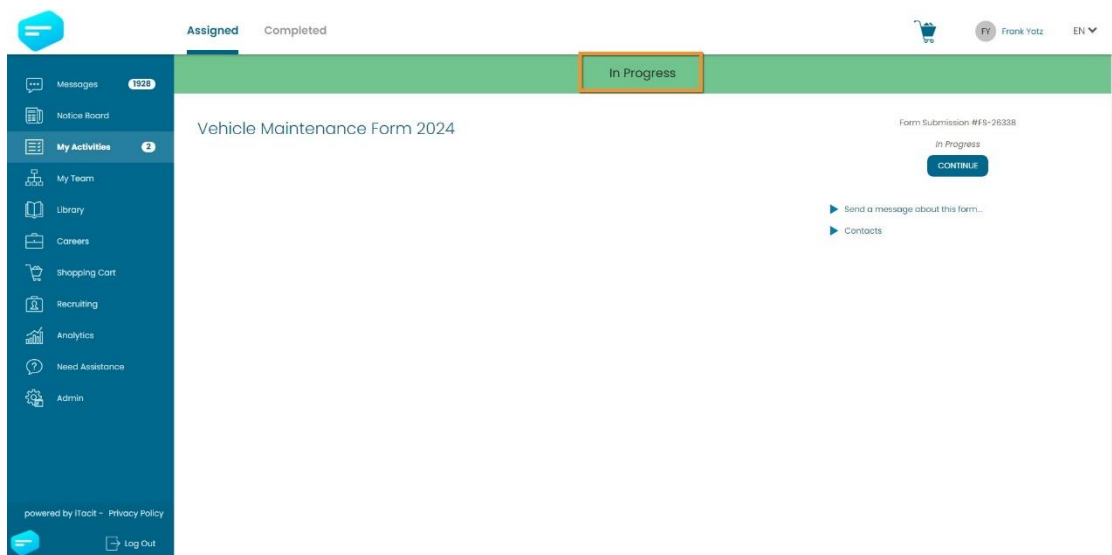
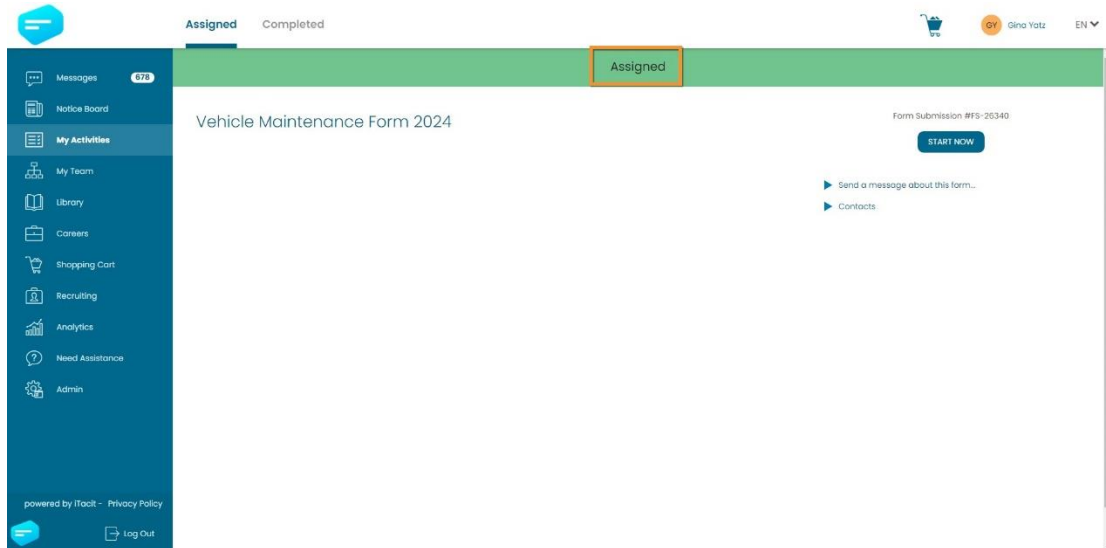
☐ Shuffle the order of questions

Permissions:

- ✓ Now that all the supporting data for Form Versioning is setup, users can utilize Form Versioning in iTacit 2.0.
- ✓ Let's look at how to do this in the next section...

Form submissions will have a link to a specific form.

End users can have forms in an *Assigned*, *In Progress*, or *Completed* status.



Users form assignment statuses of “Not Assigned”, “Assigned” or “In Progress” can receive the latest published version of a form.

Vehicle Maintenance Form 2024

FS-26340

6. Date and Time Stamp

Please enter the date and time of completion (Required)

< BACK

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NEXT >

COMPLETE FORM

SAVE FOR LATER

CLOSE WITHOUT SAVING

Submissions by users completed against earlier versions of forms will remain unchanged.

Assigned

Completed

Completed

February 5, 2024 9:56 AM

Vehicle Maintenance Form 2024

Form Submission #FS-26335

Review this form...

Send a message about this form...

Contacts

Versioning in Form Analytics

All form submissions are calculated/analyzed as one form with different versions.



Vehicle Maintenance Form 2024

Search for an employee...		Any Time	More Options...
Submitted By		Submitted On	Score/Result
	Abby Yatz FS-26333 Network Administrator, Application Services (AS) Chalmers Hospital	February 6, 2024 4:46 PM	100%
	David Yatz FS-26336 Cook, Food Services (FS) Chalmers Hospital	February 5, 2024 11:56 AM	100%
	Gina Yatz FS-26340	February 6, 2024 11:08 AM	100%

Versioning in Form Submission Manager

The Form Submission Manager has the ability to view/export responses for all versions of a form and can identify which version of a form a user completed.

A1	Subject																		
	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	Assignee E	Assignee L	Assignee F	Assignee D	Assignee U	Assignee E	Assignee R	Assignee B	Assignee B	Assignee J	Assignee R	Assignee A	Form	Code		Uses	Version	Starts	Due
2	Yatz	Abby	Yatz, Abby AY		gail.walsh	Network A	Application AS			Fredericto	Network A	Yatz, Frank Y		Vehicle Maintenance Form 2024		Vehicle Maintenance Form 2024	2	2/5/2024 0:00	
3	Yatz	David	Yatz, David DY		gail.walsh	Cook	Food Servi FS			Fredericto	Cook	Yatz, Frank Y		Vehicle Maintenance Form 2024		Vehicle Maintenance Form 2024	2	2/5/2024 0:00	
4	Yatz	Gina	Yatz, Gina GY		gail.walsh	Human Re	Human Re HR			Fredericto	Human Re	Yatz, Frank Y		Vehicle Maintenance Form 2024		Vehicle Maintenance Form 2024	2	2/5/2024 0:00	
5																			

When reviewing individual form submissions, the Form Submission Manager identifies which version of a form the user has been assigned.

The screenshot shows the 'Form Submission Manager' interface. At the top, there's a navigation bar with 'Menu', 'Home', 'Form Submission Manager', and 'Form Submission'. Below this, a user profile for 'Yatz, Abby' is displayed. The main section is titled 'Vehicle Maintenance Form 2024' with a sub-label 'Version: 2' highlighted by an orange box. Below the title, there's a section for 'Assigned to: Yatz, Abby' and a status dropdown set to 'Completed'. The 'As of' date is '06 Feb 2024'. There are also fields for 'Status Reason', '*Starts' (05 Feb 2024, 12:00 AM), and 'Due' (empty). The 'Must be completed by' field is also empty. The interface includes tabs for 'General', 'Answers', 'Attachments', 'Notes', 'Status History', and 'Multi-User'.

Versioning in Form Library Item

The Form Library Item will display the latest published form version.

The export has 2 columns: Latest Version and Latest Published Version.

The screenshot shows the 'Form Library Items' interface. At the top, there's a navigation bar with 'Menu', 'Home', and 'Form Library Items'. Below this, a search bar and a table of form items are visible. The table has columns for 'Name', 'Code', 'Uses', 'Type', and 'Active'. The first item is 'Vehicle Maintenance Form 2024'. A modal window titled 'Select Values to Export' is open, showing a list of values to export. The values are: Name, Code, Uses, Latest Version, Latest Published Version, Type, Description, Show in Library, and Show in My Team. The 'Latest Version' and 'Latest Published Version' options are highlighted by an orange box. The modal also includes a 'Download Exported Values' button and a 'Close' button.