Forms Overview

The *Forms* feature in the Trackplan FM system allows you to set up a checklist, survey, inspection, risk assessment, permit to work, or meter reading form. Forms can be attached to reactive jobs and planned schedules for completion by the FM team or contractor, either in the main application or in the apps. You can also complete forms on the fly against sites and assets.

You can set up and design as many forms as you like with 12+ question types such as pass/fail, drop-down,

photo, signature, text-box. You can also attach multiple forms to a job, whether planned or reactive.

The main *Form* page will display a grid of all the forms which can be sorted by selecting the heading of the column which you choose to sort by.

On the grid you can select any of the forms which will bring you to a page with the details for that particular Form. You can also select the following options in relation to the Form selected:

You can issue forms with a job or planned schedule, or you can make them available for general use in the forms library.

Note that for forms requiring regular daily input such as meter readings or toolbox audits, you can set a section up as "repeatable", so multiple entries can be made into one form.