What Happens When Your Forms Are Deployed

The Form Creation Process & Checklist

### Form Deployment Process

- **STEP 01**
  - New custom form definition created

- **STEP 02**
  - Form design populated with sections and fields

- **STEP 03**
  - Form publish setting configured

- **STEP 04**
  - Optional secondary form actions setup

- **STEP 05**
  - Form security updated to allow user access based on security role

- **STEP 06**
  - Form Deployed

### Form Access

- **Form Admin Users Only**
  - Add sections to give your form structure
  - Add the most suitable field types to capture the data you require
  - Check required fields set correctly
  - Set fields attributes correctly

  - Checkform Properties are complete
  - Document title
  - Document template
  - Document publish location
  - Optional photo publish location
  - Email notification based on project role
  - This is optional
  - If left blank then no secondary action occurs

### Form Deployment Guidance/Troubleshooting

- **Form Admin Users Only**
  - Change form security access group
  - Regenerate form

  - Available to all mobile users based on security setting

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