PHRST

How to use Icons on Smart Forms

Step	Action
1.	Use the Icons at the top of the page to perform actions for the form.
2.	All required fields must be completed, incomplete forms will receive an error and the form is not saved. In this example, the **One-Time Benefit Refund/Adjustment** form is used. Click the **scrollbar** to enter all the details on the form.
3.	**Save as Draft** is used for saving an incomplete form to re-use and modify at a later date. When **Save as Draft** is used, no required field edits are activated. **Note:** The saved draft will be deleted once the draft is processed. Click the **Save as Draft** button. Save as Draft
4.	Click the **OK** button. OK
5.	Click to enter a **Draft Name.** Enter the desired information into the **Draft Name** field. Enter a valid value, for example, "**Test**".
6.	Click to enter **Description.** Enter the desired information into the **Description** field. Enter a valid value, for example, "**Testing Save as Draft**".
7.	Click the **OK** button to save the draft. ✓ OK
8.	Now revisions may be applied to the form and saved. At completion of data input, hover on the **Save** Icon. Hover on the **Save** Icon.

Step	Action
9.	Click the **Save Form** button. Save Form
10.	The form is saved successfully. **Note:** All information in the first section (**Form Instance**, **Created By, Creation Date/Time**, **Approval Status**, **Updated By**, **Updated Date/Time**) is automatically populated and the **Form Instance** number is generated for reference at this point.
11.	The **Attach** icon is available to add supporting documents to a particular form. Click the **Attach** Icon. Attach
12.	Click the **Attach** symbol.
13.	Click the **Browse...** button. Browse...
14.	Browse to select the file to be uploaded. Click the **Open** button. Open
15.	Click the **Upload** button. Upload
16.	The document uploaded is attached successfully. Click the **OK** button to return to the form. OK
17.	**Copy** icon is available to copy the contents of the saved draft into new forms. Hover on the **Copy** Icon.
18.	Once a saved draft has been copied, that draft will be deleted. Click the **Copy from Draft** button. Copy from Draft
19.	Click the **OK** button. OK
20.	Click the **1** option.
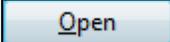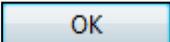
Step	Action
21.	Click the **OK** button.
22.	The Test form details are copied on to the current form. The form can be updated as needed. Hover over **Save** to select **Save Form**. Click the **Save Form** button.
23.	The **Print** icon is used to change the form into a print friendly format. Click the **Print** Icon.
24.	The form format changes. Click the **scrollbar** to review all the information.
25.	Right click on the page to bring up the menu to print. Right-click the **Page**.
26.	Click the **Print...** menu.
27.	Click **Print** on the menu.
28.	Click the **scrollbar** to move to the bottom of the page.
29.	The **Return to Main Page** hyperlink navigates back to the main page. Click the **Return To Main Page** link.
30.	**Help** provides instructions on how to complete the form. Click the **Help** Icon.
31.	**Workflow** is used to **ViewApprovalMap** and **Submit** the form into **Workflow**. Hover over the **Workflow** button.
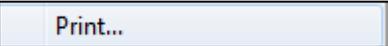
Step	Action
32.	The **ViewApprovalMap** function of **Workflow** will open with the approval map page. Click the **ViewApprovalMap**. ViewApprovalMap
33.	The **Workflow** status of the form to be submitted is now **Initiated**. Selecting **OK** will return to the form. Click the **OK** symbol. OK
34.	The **Submit** button will open the **Workflow** page. Click **Submit**. Submit
35.	The status of the form submitted is now **Pending**. The form is not submitted into Workflow until the **OK** is clicked. Click the **OK** icon. OK
36.	The **Approval Status** value changes from **Initial** to **In Workflow**.
37.	Selecting the **X (Close)** in the right hand corner of the application closes the form. Click the **Close** button. X
38.	Congratulations! You now know how to: - **Save** the created form as a **Draft**. - **Save** the created form. - **Attach** the documents to the created form. - **Copy** the data from the draft on to the new form. - **Print** the created form. - Use the **Help** Icon for Instructions. - Submit a Data Change Request into **Workflow**. **End of Procedure.**