

2E. WEB – MANAGE FORMS

NOTE: Preferred web browser for optimal performance is **Google Chrome** <https://catinspectweb.cat.com>

Manage Forms requires and Create Forms require **AUTHOR** access.

Author
 Ability to create and manage forms, assign inspections, view completed inspections, use advanced search as well as create QR Codes.
 Author can also use all features in the mobile app as well as complete online inspections.

Author access can be provisioned by any user in the organization with Administrator access or request sent to digitalservices@finning.com

Click on

Manage Forms ☰

--Select Type--
 --Select Type--
 All Custom Forms
 Select Family
 Serial Number Prefix

Created By	Last Modified Date ↓	Form Number	
Items per page: 10 0 of 0 < < > >			

Search by the available types to locate the form required.

- Use filters and fields available to locate form
- Note the Family, Serial Number Prefix and the Form Name for in-app search
- Click on the Form Name to preview
- Returned results can be refreshed or exported to Excel via

Serial Number Prefix	Product Family	Type	Name	Created By	Last Modified Date ↓	Form Number			
	FAMILY-ALL	Dealer Process	D18 Incoming / Final Inspection	Miranda Wensel	10/02/2019, 04:17 PM	133104			
	FAMILY-ALL	Safety	Track Bay Winch Inspection	Tara Mckee	09/19/2019, 05:20 PM	143740			
	FAMILY-ALL	Safety	Finning Canada Focused Leadership Safety Walkthrough	Miranda Wensel	09/09/2019, 07:14 PM	143614			


Hovering on a line to the right will bring up the following options:

- If the form is Active, this box is to archive the form. If the form is Archived, this box becomes an activation box.
- Modify the form
- Clone form


Form Status






AutoSaved Draft Forms

Draft forms are created via Auto-Save feature built into Cat Inspect Web. If user clicks on the Save button , a Draft form is then created and may be viewed under Manage Forms

Click 


- Select Type > Click 
 - Select Type--
 - Select Type--
 - All Custom Forms
 - Select Family
 - Serial Number Prefix

Serial Number Prefix	Type	Name	Created By	Last Modified Date ↓	Form Number			
ABC	PM Checklist	asdfas	Miranda Wensel	10/17/2018, 2:57 PM	100536			
	Dealer Process	Product Link Registration	Miranda Wensel	10/10/2018, 10:57 AM	99359			
	Dealer Process	Product Link Registration	Miranda Wensel	10/05/2018, 11:47 AM	99713			
	Dealer Process	Product Link Registration	Miranda Wensel	09/28/2018, 4:04 PM	97411			
	Dealer Process	Product Link Configuration	Miranda Wensel	09/28/2018, 3:55 PM	97165			
	Dealer Process	Used Supercentre Inbound Inspection	Jeffrey Andersen	09/27/2018, 10:22 AM	96955			
	Dealer Process	Used Supercentre Outbound Inspection	Jeffrey Andersen	09/27/2018, 10:13 AM	97035			

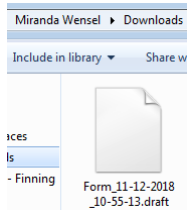
The following option appears by hovering to the right of the draft form 

- Click icon to open up form to continue with edits – follow [Create Form](#) process.

Download Draft Forms

When creating forms, clicking on the  icon downloads a '.draft' file of the form being created.

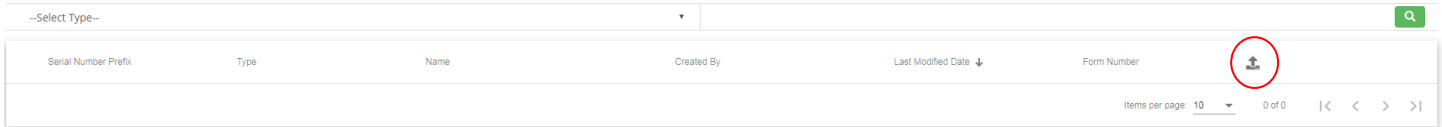
- This saves the form in its current state into the Downloads folder



- Each downloaded draft form is saved as a '.draft' file – file may be renamed but **do not** change the file type.
- These forms will contain information up to the point when it was saved prior to download.

Uploading Draft Forms

Click



- Click to upload downloaded .draft file
- Navigate to the .draft file saved > select to open
- Opening the draft file opens up the Create Form window – continue through the form creation process
- Clicking at any time before the form is published, resets the form

Form Reset

Are you sure you want to reset the form?

Cancel OK

Forms Don't Exist, What Now?

If forms do not exist, then the option is to create a custom form.