Purpose

The purpose of this user guide is to describe:

1. What is a Custom Form
2. How a to create a Custom Form
3. How to configure Settings in a Custom Form

Related User Guides:

- How to Configure Custom Fields in a Custom Form
- How to Configure Expenditure in a Custom Form
- How to Configure Default Contacts in a Custom Form
- How to Configure Authorities in a Custom Form
- How to Configure Notification Templates in a Custom Form
- How to Configure Notifications in a Custom Form
- How to Create a Report from a Custom Form

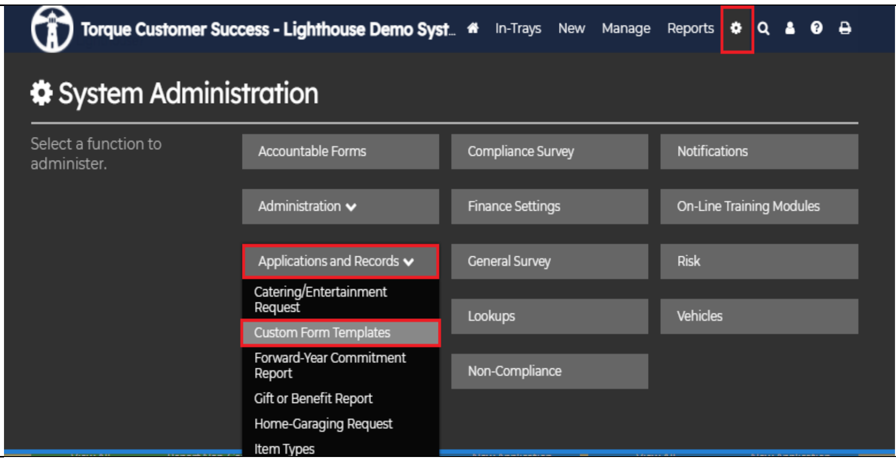
1. What is a Custom Form?

A Custom Form is a very flexible and powerful tool which allows you to rapidly configure a business process in the Lighthouse environment that delivers your desired business process, follows your policy, and enforces relevant compliance obligations. Some of the benefits of Custom Forms include:

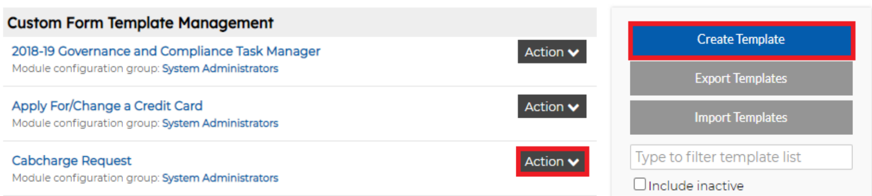
- Custom Forms can be rapidly configured, tested and implemented
- Custom Forms can be edited and updated as required to respond to your changing business needs
- There Is a full audit log of all activity undertaken using a Custom Form
- Custom Forms have fully electronic workflows end-to-end
- Custom Forms are intuitive and easy to use
- You can use Custom Forms to enforce policy and delegation controls (compliance by design)
- Custom Forms have powerful reporting tools, including dashboards

2. How to Create a Custom Form?

Step 1: Access the Custom Form administration area in Lighthouse



Step 2: Click the "Create Template" button to create a new Custom Form



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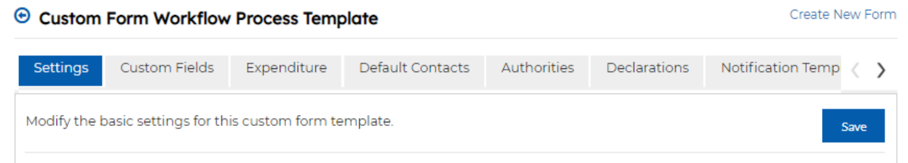
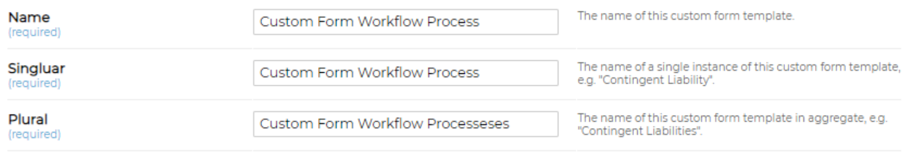
3. How to Configure Settings in a Custom Form

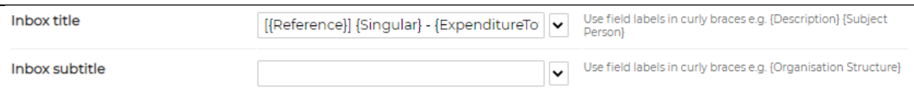
Step 1: Configure the settings



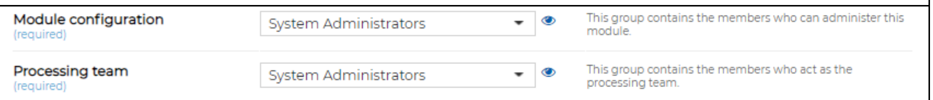
- **Name** - This is the name you give to the Custom Form. This name will appear only in the list of Custom Forms visible to the System Administrator. *TIP:* Make the name as simple and clear as possible.
- **Singular** - Name used when referring to only a single form. *TIP:* Where possible, use the same name here as in the previous field.
- **Plural** - This name used when referring to multiple forms. For example, it Is used in the list of Custom Form datasets available for reporting.



- **Inbox Title** - This is the information that appears as the title in the Inbox of the recipient of any emails generated by Lighthouse for this Custom Form. *TIP:* Include information that will assist the recipient to understand the objective of the email notification.
- **Inbox Subtitle** - This is the information that appears as the subtitle in the Inbox of the recipient of any emails generated by Lighthouse for this Custom Form.

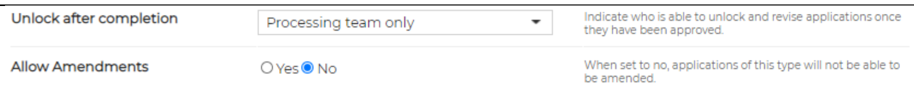


- **Module Configuration** - This is where you set the group that has system permission to configure the Custom Form.
- **Processing Team** - This is where you set the group which is responsible for the administration of the business process that is the subject of the Custom Form. Members of this group will be able to view and report on all forms.



- **Restrict Visibility** - If you set this setting to "Yes" the system will limit the visibility of this Custom Form Template to only the specified group.

- **Unlock after Completion** - This setting controls whether or not a form of this type can be unlocked after it Is completed, and if so, who can unlock.
- **Allow Amendments** - This setting controls whether or not amendments will be allowed for forms of this type. Please note, amendments will result in the creation of a duplicate form with a new reference number. *TIP:* Do not allow amendments to a Custom Form unless absolutely necessary.



• **Show additional Contacts -** This setting provides the option to show or hide the additional contacts section in a Custom Form. If Additional Contacts are to be shown, the type of view is also selectable (i.e. expanded, minimised, or in the menu) • **Additional Contacts Section Title -** This setting allows you to set the title for the Additional Contacts section of the form. *TIP:* The name you choose for this section of the form may assist users of the form to understand why they might add an additional contact (e.g. Key Stakeholders for This Matter)	
• **Include Authority Section -** This setting allows you to include an authority section in your Custom Form. This creates workflow for the form. *TIP:* there Is In limit to the number of workflows that you can have In a Custom Form. • **Authority Section Title** - This setting allows you to configure the title of the Authority Section of your Custom Form. *TIP:* Make the name of the Authority Section of the Custom Form self-explanatory for the users of your form. For example, you might use the title, "Workflows", or "Delegate Approval" etc. • **Default Decision Date to Today -** Each authority in the Authority Section of your Custom Form will record the date of the action or decision that the authority is exercised. If this setting is set to "Yes", the outcome decision date will be defaulted to the current date.	
• **Active -** This setting allows you to make a Custom Form active. If a Custom Form is active, a tile for the Custom Form will be visible for users that use the Tiles dashboard, and the Custom Form will be available for use. *TIP:* Custom Forms do not automatically appear in the menu when made active. Menu items must be separately configured by a System Administrator.	

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