



**Goal:** This document focuses entirely on enabling a user to create an Online Form Template within EcoDox.

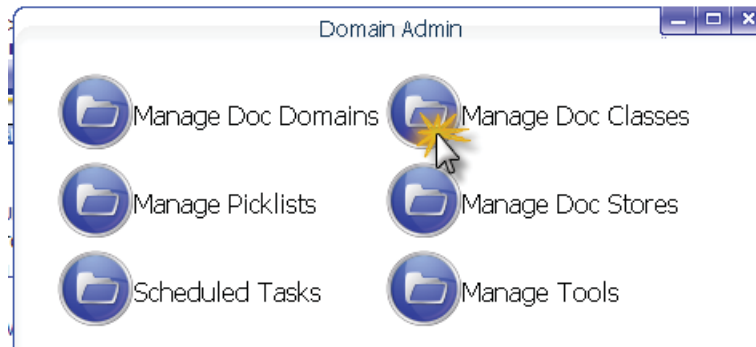
**Complexity Level:** Admin / Group Admin User

**Prereq / Related Instructions:** NONE

**Step 1: Navigate to Domain Admin** – Select the Domain Admin from the Fisheye top navigation bar.



**Step 2: Manage Doc Class** – Upon selecting the search icon, a pwindow will open within the browser. Select the Manage Doc Classes icon within the pwindow.



**Step 3: Select Doc Class** – Select the desired Doc Class from the list. The Template column within the list will note whether a Doc Class already has an Online Form Template configured (True indicates existing template / False indicates no existing template).

Class Name	Class Description	Number Of Documents	Global Route	Expression Route	Template	Active	Status	Remove Class
ACCOUNTS PAYABLE	ACCOUNTS PAYABLE	3	false	0	false	☑	▼	Remove?
ALL COMPANY DOCS	ALL COMPANY DOCS	79	false	0	false	☑	▼	Remove?
ARCHIVE	ARCHIVE	11	false	0	false	☑	▼	Remove?
CLIENT	CLIENT LAW	0	false	0	true	☑	▼	Remove?
EHR	EHR	5	false	0	false	☑	▼	Remove?
HUMAN RESOURCES	HUMAN RESOURCES	35	false	1	true	☑	▼	Remove?
JOB FILE	JOB FILE	16	false	0	true	☑	▼	Remove?
PROPERTY	PROPERTY	9	false	0	false	☑	▼	Remove?



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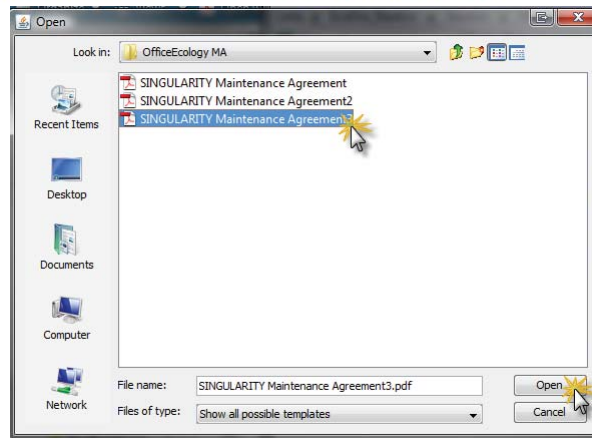
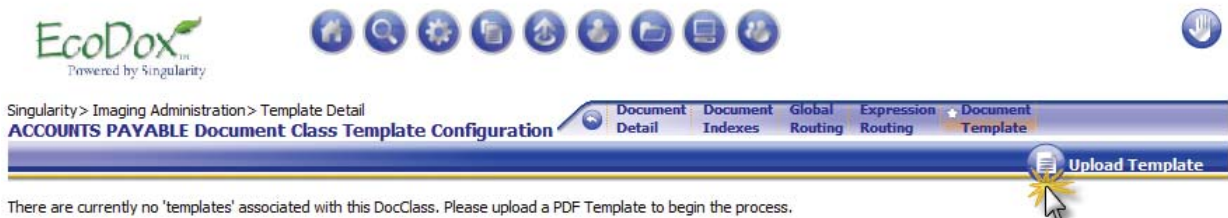
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**Step 4: Select Document Template Tab** – Select the Document Template tab from the tab bar. This will direct you to the Doc Class online form template configuration screen. Note that a Doc Class can have multiple versions of an online form configured.



**Step 5: Form Upload**– Select the Upload Template icon and select the Template from the local file system.





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**Step 6: Configure Template and Save** – Be sure to name the Template and provide a description. Select the appropriate Form Field Attributes.

**Step 6b: Save** – Be sure to SAVE all changes before leaving the template screen. Then once saved, the form will be found in the Online Forms section in Ecodox and be ready for use.

Complete!!!

