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INTREPID INFORM

User Guide Web

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Intrepid NETWORKS®

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Introduction

Intrepid Inform enables users to create, publish, and access the Intrepid Form Library, and to complete digital forms directly within the Intrepid platform. It replaces paper or PDF workflows with structured, reusable form templates. Forms are accessible via both the web interface and the mobile application.

Who should use this guide?

All users with an Inform license can access Inform on the web and in the mobile app. Only Organization Administrator and Supervisor users can create and manage forms in the Build module. Form building is available only through the web interface. Operator-level users with an Inform license are taken directly to the Submit view and cannot access the Build module.

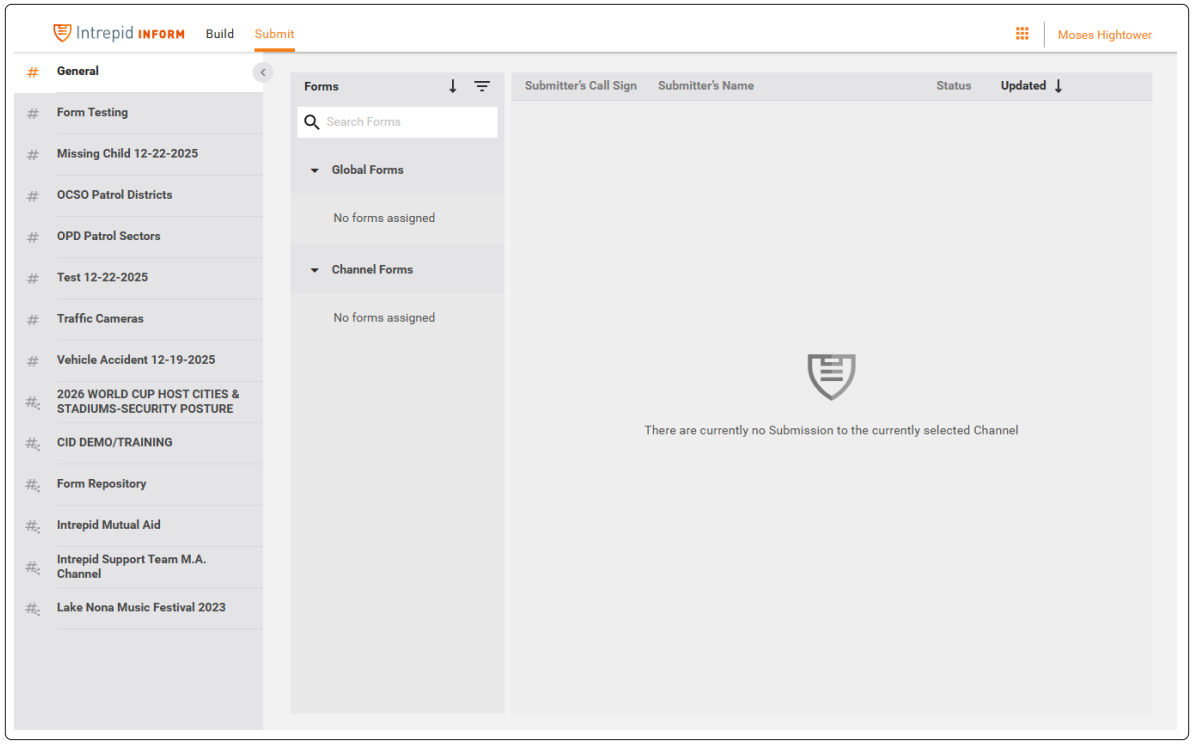
Navigating the Interface

Inform has two main sections for Organization Administrators and Supervisors: **Build** and **Submit**. Switch between them using the tabs in the upper-left corner of the screen.

- **Build:** Create and manage form templates.
- **Submit:** Fill out and submit forms assigned to channels, view submissions, and download PDFs of completed forms.

Operator-level users see only the Submit view and do not have Build/Submit navigation tabs.

A session timeout reminder appears after a period of inactivity. Select the option to remain signed in to continue working. At login, check **Remember Me** to reduce these reminders and stay signed in longer.



Build Module

The Build module allows authorized users (Organization Administrators and Supervisors) to create custom forms or import forms from the Intrepid Form Library for use within their organization.

Key features include

- Drag-and-drop form builder
- Assigning forms to one or more channels or making them globally accessible
- Sharing form templates with a Mutual Aid Channel
- With a Connect license: uploading photos from the field or desktop, and exporting completed submissions as PDFs



Build Overview

In the Build section, you create and manage form templates. You can:

- Create a new template
- Import templates from the Intrepid Library
- Edit or duplicate existing templates
- Publish forms to one or more channels

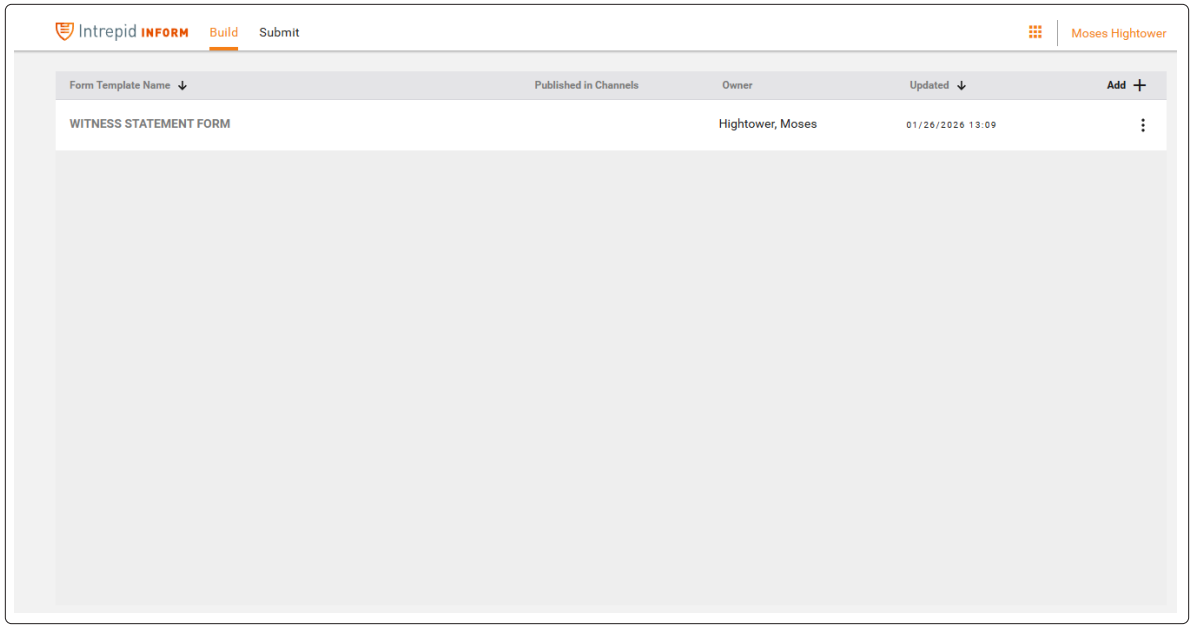
Form templates have two states:

- **Published** — Ready for use; assigned to one or more channels or set to Global; visible to Operators.
- **Unpublished** — Draft state; not visible to Operator-level users.

Icons in the template list allow you to Preview, Duplicate, Publish, or Delete templates.

Use **Save Progress** to save work inside the builder at any time.

The **Form Settings** tab controls the title, description, and channel assignment. Enter a title in the upper-left field (names are automatically converted to uppercase).



Build Overview Cont.

The Form Builder provides a drag-and-drop interface. Click any field to open its configuration panel for adding labels, help text, or validation.

Important: Once a form is published and at least one submission exists, you can no longer edit or delete the template.

The **PDF Settings** tab lets you customize the export layout: upload a logo, align it (left, right, center), show/hide the form title, and select paper size.

When at least one channel (or Global) is selected and changes are made in Form Settings, the **Save Progress** button changes to **Save & Publish**.

Editing an Existing Form Template

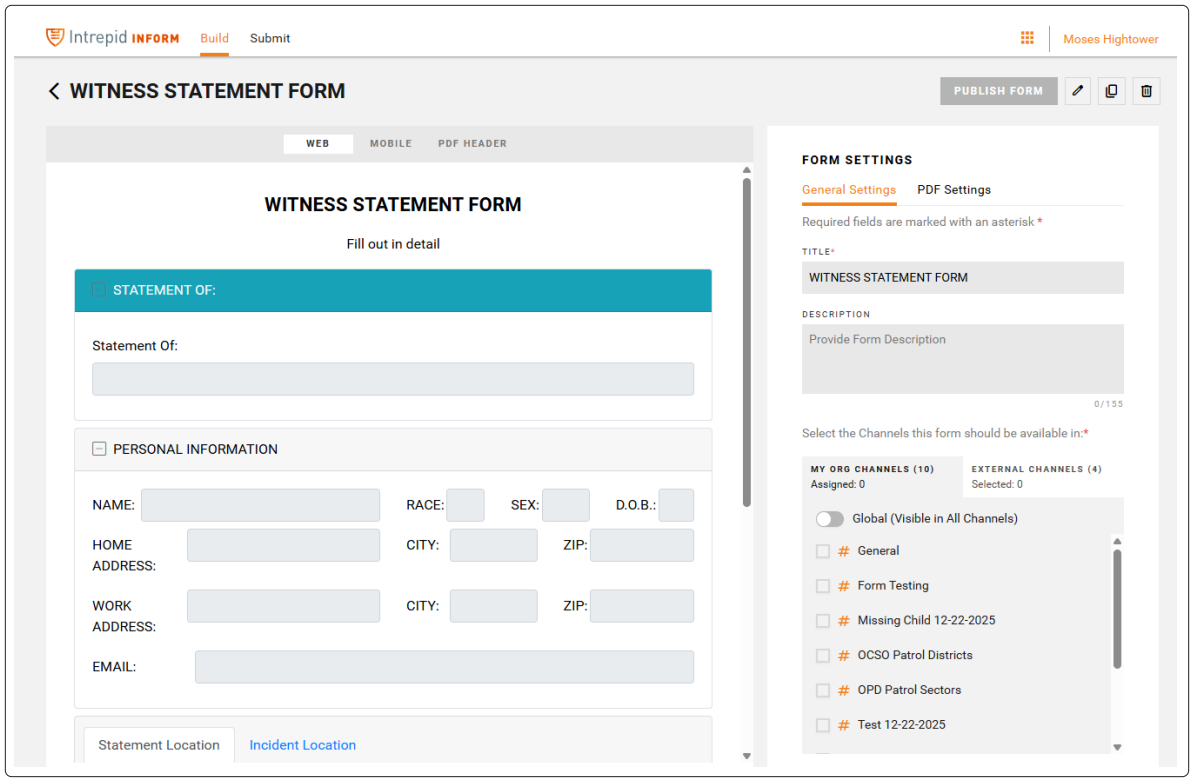
Open a form template, then click **Preview** to view it. The pencil icon appears only in preview mode for editing the form structure.

Note: Published forms allow editing only of Form Settings or PDF Settings (not the structure). Form names are automatically uppercase.

You can **Duplicate** a form to create an editable copy. The duplicate opens with the placeholder name "Enter the Form Title." Template names must be unique within the organization.

If you try to save a duplicate name, you will see: “Form title must be unique within this organization.” Adjust the name (trailing spaces are automatically removed) and save.

Templates with existing submissions cannot be deleted. Attempting to do so triggers: “You can’t delete this form. It already has submissions tied to it.”



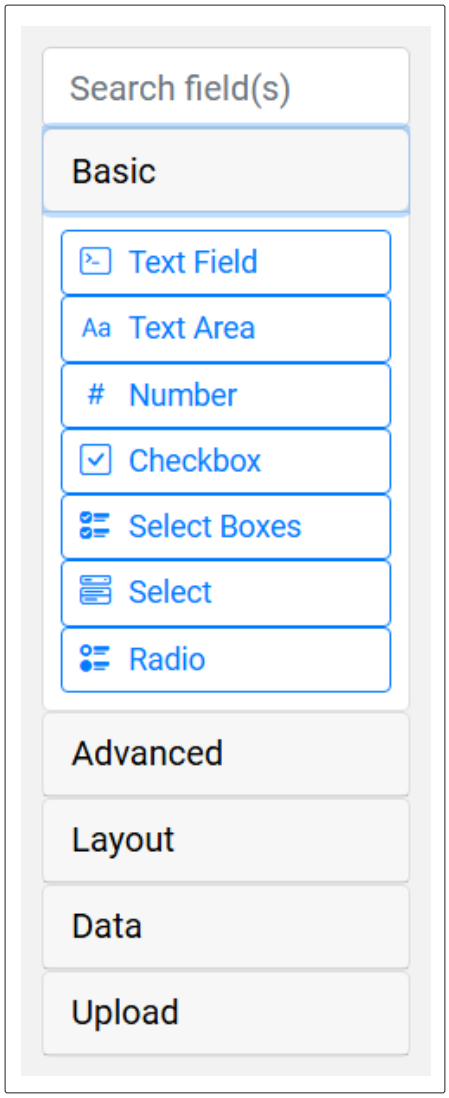
Creating a Form Template

To start, click the **ADD +** button in the upper-right corner. Choose to import from the Intrepid Library or create a new template.

Build your form by dragging components from the left column into the workspace. Release the mouse to open the configuration dialog for that component (e.g., set label, help text, validation).

Basic

The Basic Tab contains the following assets:



Text Field: A single-line box for quick data entry. Use it for short answers or names. Officer name, case ID, badge number

Text Area: A larger text box for longer input. Works well for reports or narratives. Incident summary, field notes.

Number: Only accepts digits. Helpful for counts, IDs, or anything that shouldn't include letters – vehicle mileage, case number, quantity seized, etc.

Checkbox: A simple yes/no option. You can use one or a list of them. For example: "Equipment inspected," "Scene secure"

Select: Lets users pick multiple items from a list. Allows users to choose several units or personnel responding, for example.

Radio: Similar to Select, but all options are visible at once. For example: Priority: Low / Medium / High

These are the primary components used in most forms. Simply drag the appropriate object into your form and configure as needed.

Creating a Form Template Cont.

Advanced
This tab contains elements with content validation. The options available in this section may differ between iterations of the application.

Email: Collects email addresses and checks format automatically.

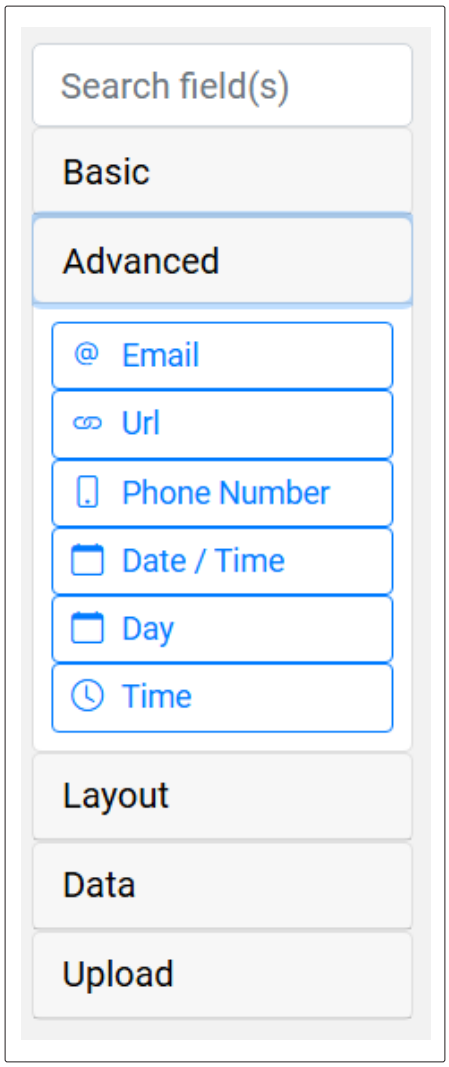
URL: Captures a web link, allowing users to attach link to a report or reference document

Phone Number: Enforces number formatting for contact fields.

Date and Time: Select both date and time together.

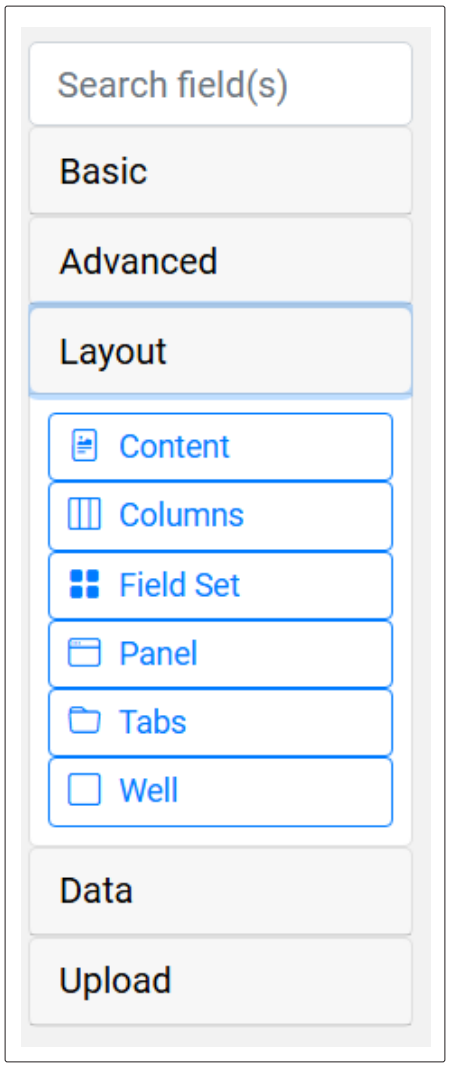
Day: A date picker with no time field.

Time: Time entry only.



Creating a Form Template Cont.

Layout
Layout components are used to change the general layout and position of fields on a form. Utilize the editor tools to add logos, headers, or static contextual language to the form.



Content: An option for adding static content to the form, such as contextual language, headers, or media. For instance, if you need to provide instructions at the top of a form for display purposes only, use the Content component. A WYSIWYG editor is provided within the component to format the content. This tool does not collect data, it adds text or instructions between fields.

Columns: The columns option can be used for grouping other components into configurable columns. Use Columns if you want to display multiple components inline. Columns can be utilized to save vertical space on a form and will collapse when the form is rendered on a mobile device.

Field Sets allows you to group multiple fields together in a form. It helps organize related fields visually and logically, making it easier to manage and present complex forms. Field Sets can be used to group fields under a common heading or section.

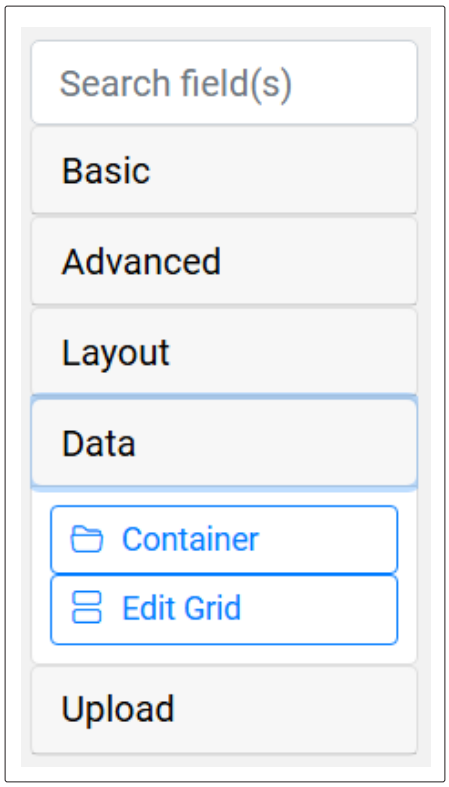
Panels are used to organize and group other form components into a collapsible or expandable section. Panels help structure forms by visually separating different sections or categories of information. They can include a title and be configured to open or close, which helps in managing and navigating complex forms by reducing clutter and improving the user experience.

The **Well** option is a special type of form component designed to help with layout and visual separation within a form, making components inside the Well more user-friendly and visually appealing.

Use the layout tools to organize and structure longer forms.
Adding tool tips, placeholders, and default values can help provide clarity to form users.

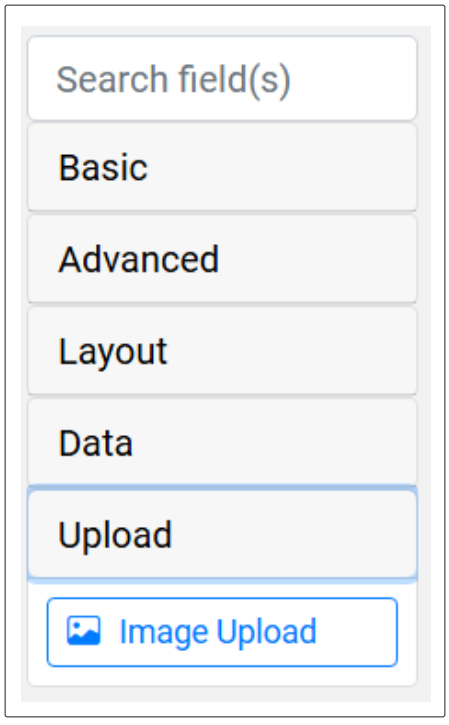
Creating a Form Template Cont.

Data
The Data components are fields that manipulate the way Data is presented, saved, and organized.



Container: The container is a hidden wrapper that is used to group other form components together within a form. What makes the Container unique to the other Layout components is how it stores component data. The components inside the Container are grouped into an object under the Container's API Property key and are saved within the metadata structure of the submission. This feature is particularly useful for creating more complex objects and data sets within your form.

Edit Grid: The Edit Grid replicates a table-like structure when it comes to the capture and display of form data. Users can add multiple components inside the Edit Grid. Additionally, any number of grids can be added within a form, which is especially useful when needing the ability to add or duplicate multiple fieldsets. There is also flexibility in how the Edit Grid data rows are saved and displayed to the end user.



Upload
Adds a photo field to the form. Users can take a new picture or select one from their device. Users may upload scene photos, vehicle images, or equipment pictures.

Note: Only visible to builders with a Connect license. Images are stored securely within the submission for this release.

Publishing Forms

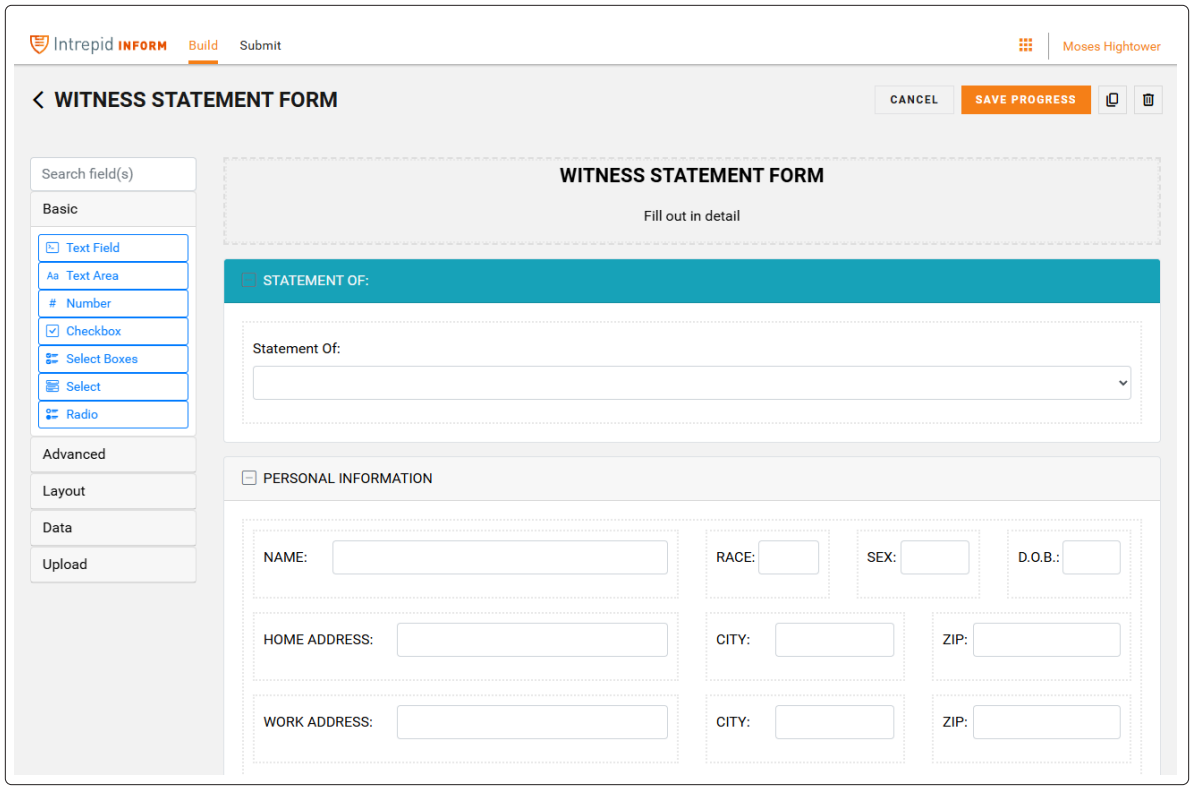
When ready, save progress, then select **Next** to open Form Settings. Choose one or more channels or **Global** (for all channels in the organization). Click **Publish Form**.

If changes are made in Form Settings with a channel/Global selected, the button reads **Save & Publish**.

Published forms appear in the Submit section for users in the assigned channels.

Notes

- At least one channel or Global must be selected to publish.
- Once published, the form is visible and usable in Submit.

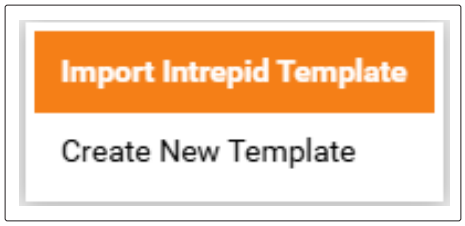


Importing from Intrepid Library

Note: The production Library currently has no forms. This section will be updated when sample forms are available.

To import: Click **ADD** +, then **IMPORT INTREPID TEMPLATE**. Select a template (e.g., Vehicle Inspection or Deployment Matrix).

Imported templates are copied to your organization. You can edit them freely; changes do not affect the original library version.



Submit Overview

The Submit section lets users view, complete, and download form submissions. It is available on web and mobile.

- **Channels panel:** Shows available channels.
- **Forms panel:** Displays Global forms and forms for the selected channel.
- **Submissions panel:** Shows submissions for the selected form.

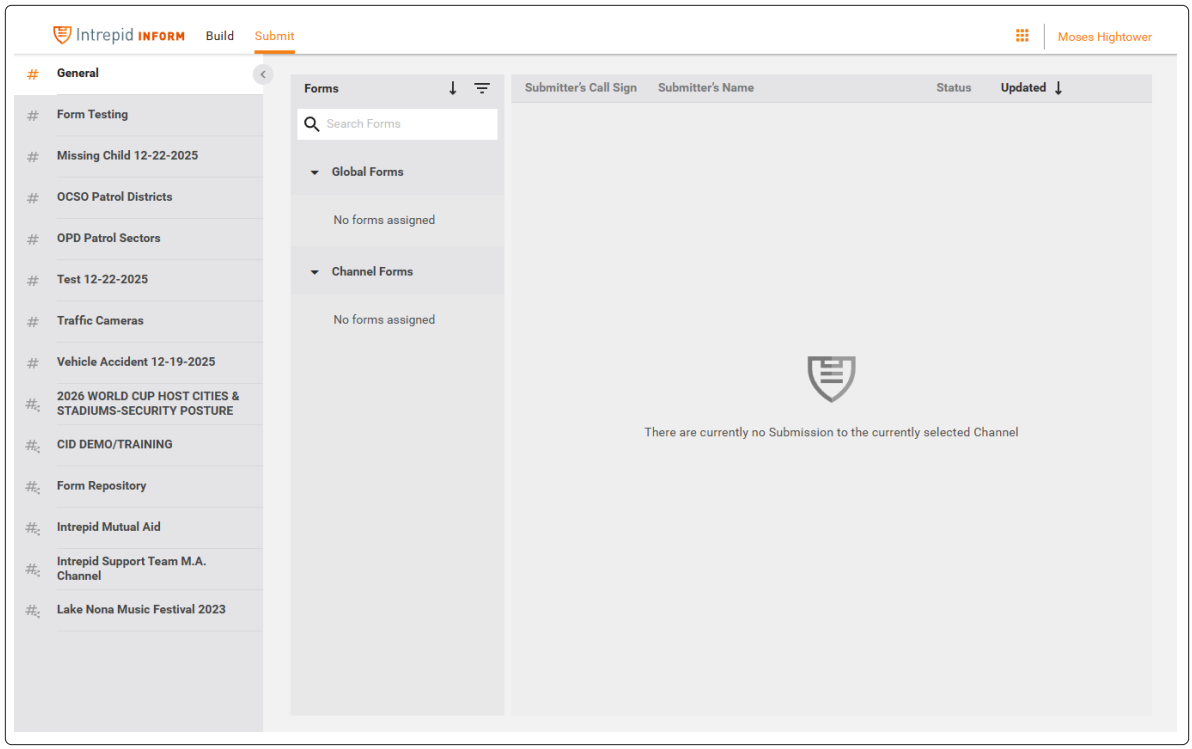
[Screenshot: Submit overview showing Channels, Forms, and Submissions panels]

Filter and Search

Use the Filter button to locate drafts/submissions by Submitter, Status (Draft or Submitted), or Date Range. The button stays highlighted when filters are active.

If no results match: “No results match your filters. Tap Reset to show all submissions.”

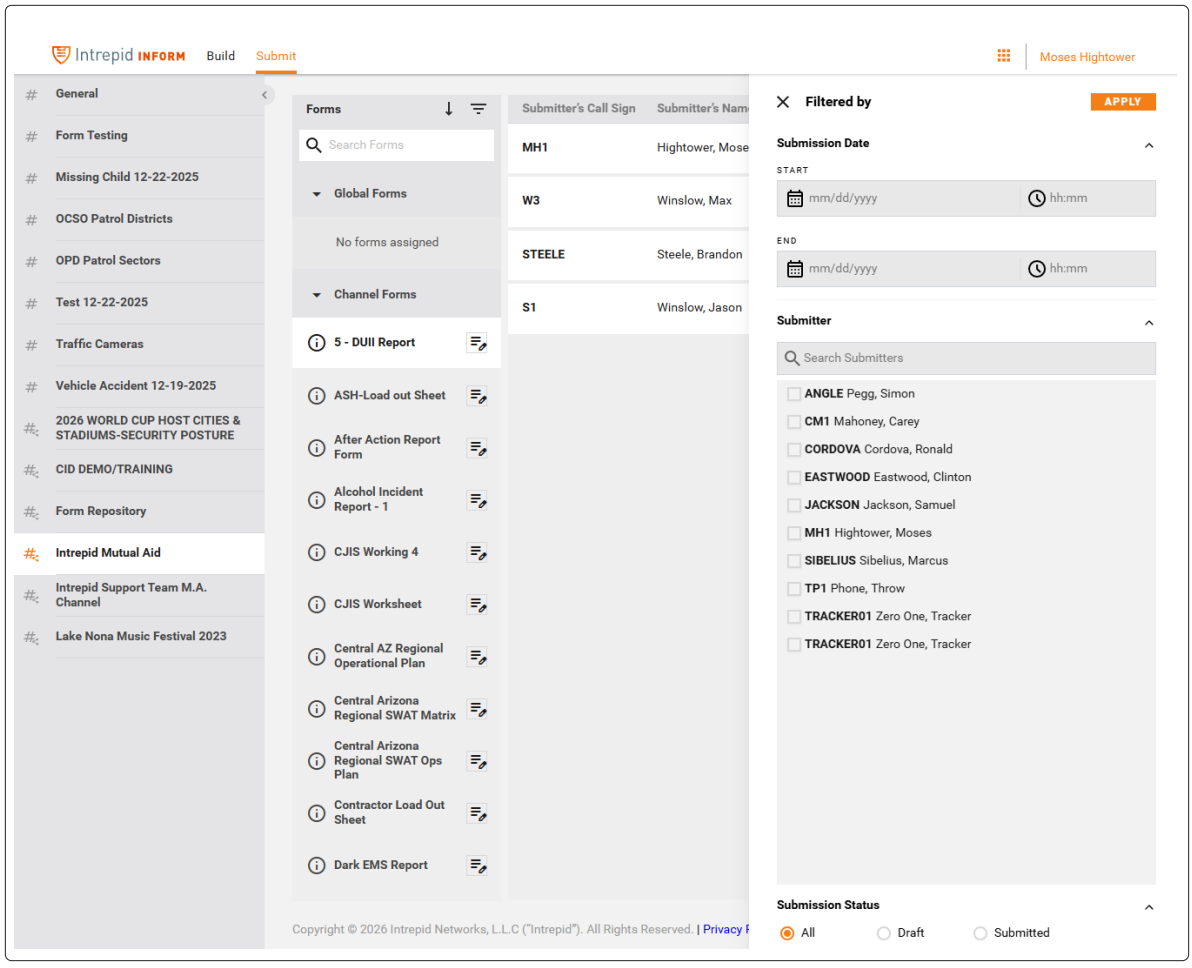
Use **Reset Filters** to clear selections.



Submit Overview Cont.

Drafts are editable only by the creator (read-only for others). Submitted forms are read-only for everyone. All users can view or download PDFs of any submission.

Only the submission owner can edit/delete their own drafts (or delete owned submissions).



Filling Out and Managing Submissions

From Channel → Form view:

- Click the **i** (info) icon to preview the form.
- Click **Fill Out Form** to start a new submission.

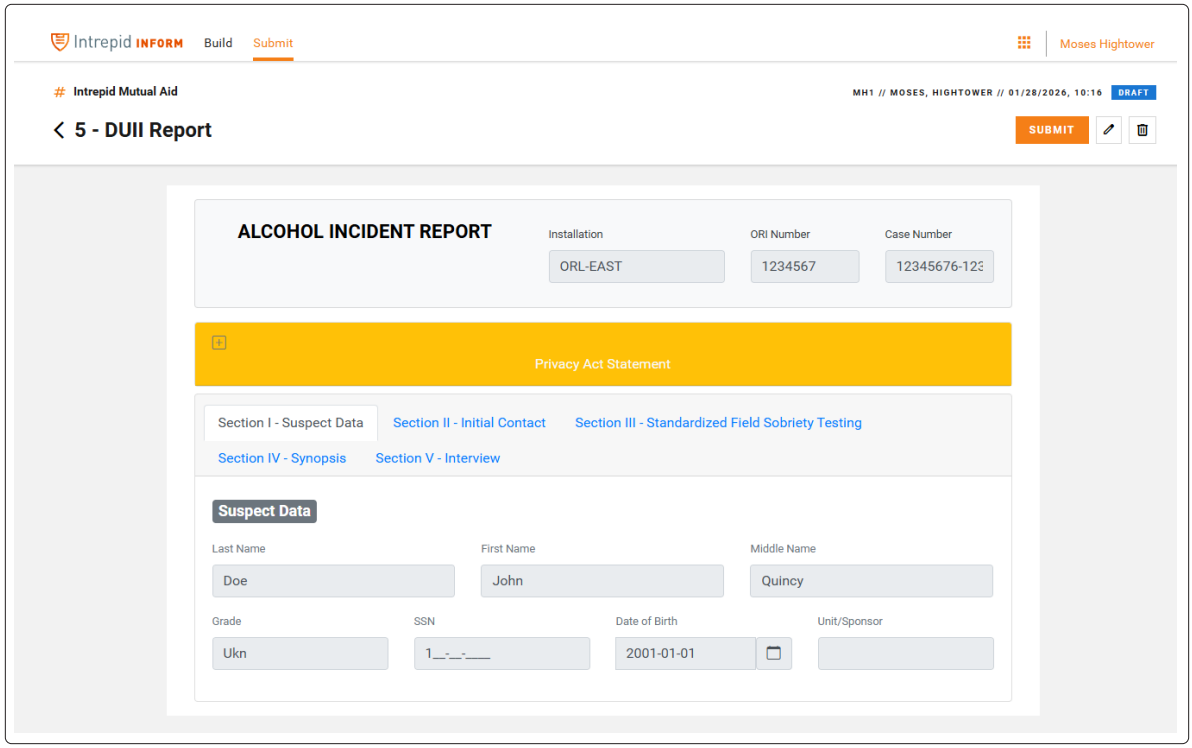
To complete a form

1. Select Channel → Form → **Fill Out Form.**
2. Complete required fields and upload photos (if enabled).
3. Click **Save Draft** to store progress or **Submit** to finalize.

Drafts remain editable by the creator. Submitted forms are read-only.

PDF Export

- Click Download PDF for any submission.
- A loading indicator appears during generation.



Reviewing Submissions

Anyone with access to a channel can review its submissions. Use filters to view by user, date, or status. Drafts and submitted forms use different icons for quick identification. All submissions can be viewed or downloaded as PDFs.

Troubleshooting and FAQs

- **Form won't publish:** Ensure at least one channel or Global is selected.
- **Duplicate title error:** Choose a unique name; trailing spaces are removed automatically.
- **Upload option missing:** Builder may lack a Connect license.
- **Form can't be deleted:** It has existing submissions.
- **Timeout warning:** Re-login or select **Remember Me** at login.

Support and Resources

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