

Create a control from a template

This feature allows you to create a control and form based on an existing template, simplifying the configuration of your controls. To use this feature, you must have the superuser role.

Note: Copying a template allows you to create both the form and an associated draft control. You will then need to modify both the form and the control to meet your configuration requirements.

STEP 1

To create a control from a template, go to the **Compliance** platform menu → **Templates**.

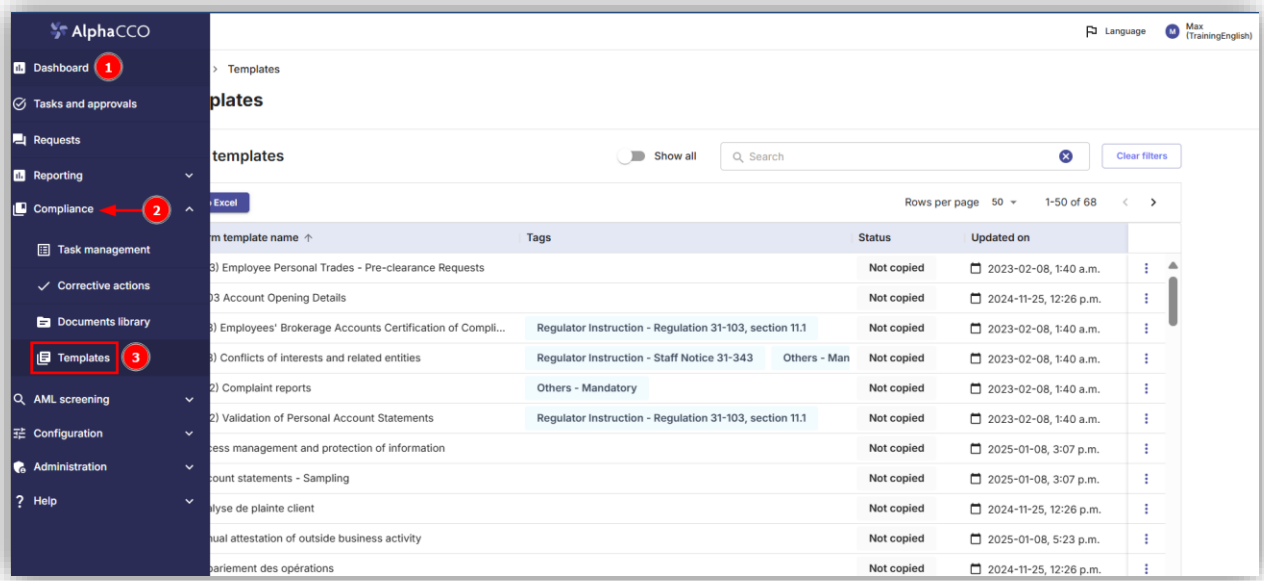


Figure 1: Control templates menu page

STEP 2

Click on the template options button, then select **Copy** to create a copy of the form. You can also select **Preview** to view the form associated with the control.

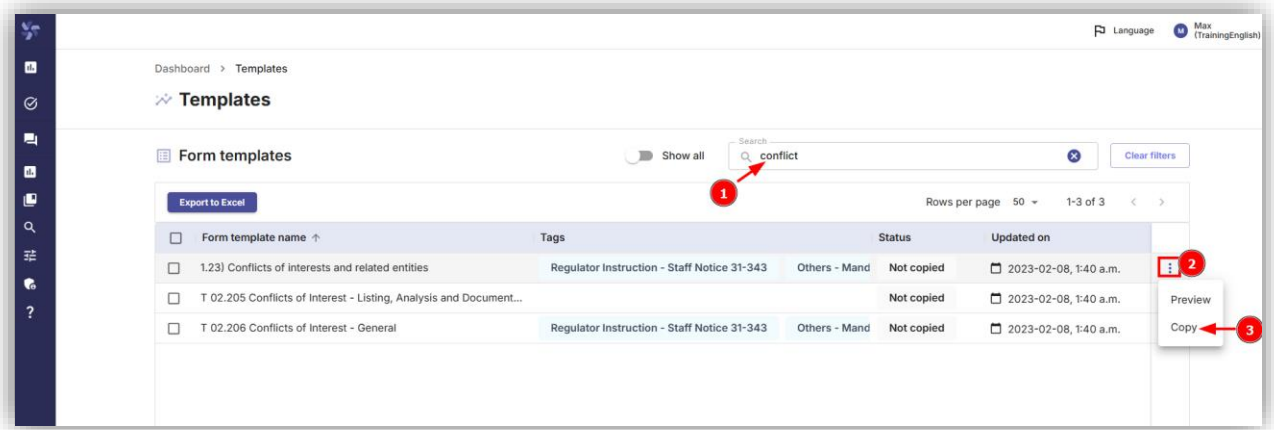


Figure 2: Control template options page.

STEP 3

In the window that appears, rename the control if needed, then click on **Use template**.

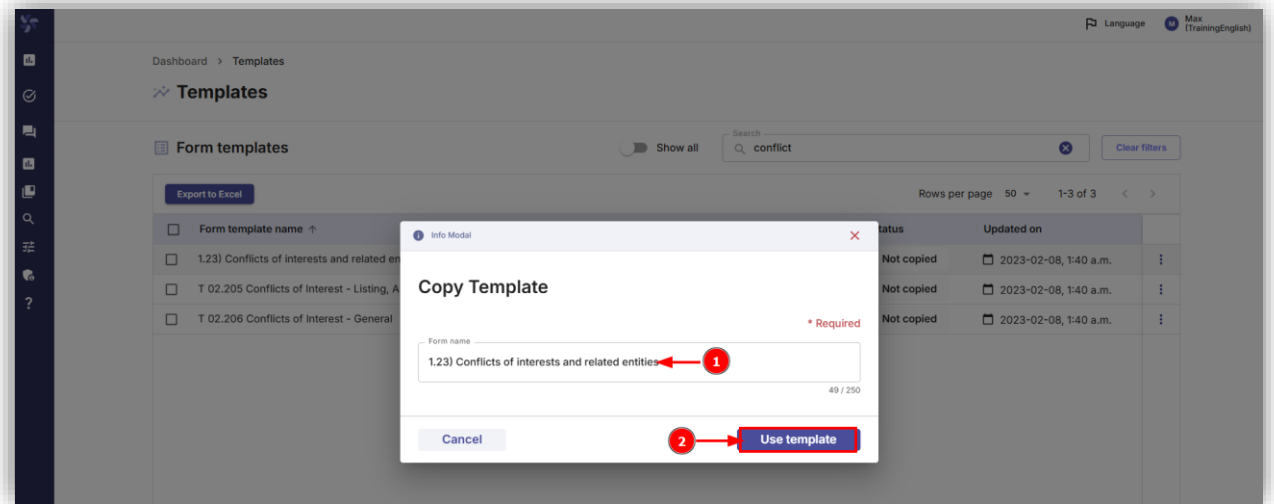


Figure 3: Confirmation window for copying a control template.

STEP 4

Go to the **Configuration** → **Controls**, then search for the control copied in step 3. The control is preconfigured **with Draft** status. Click on the control to adjust it as required.

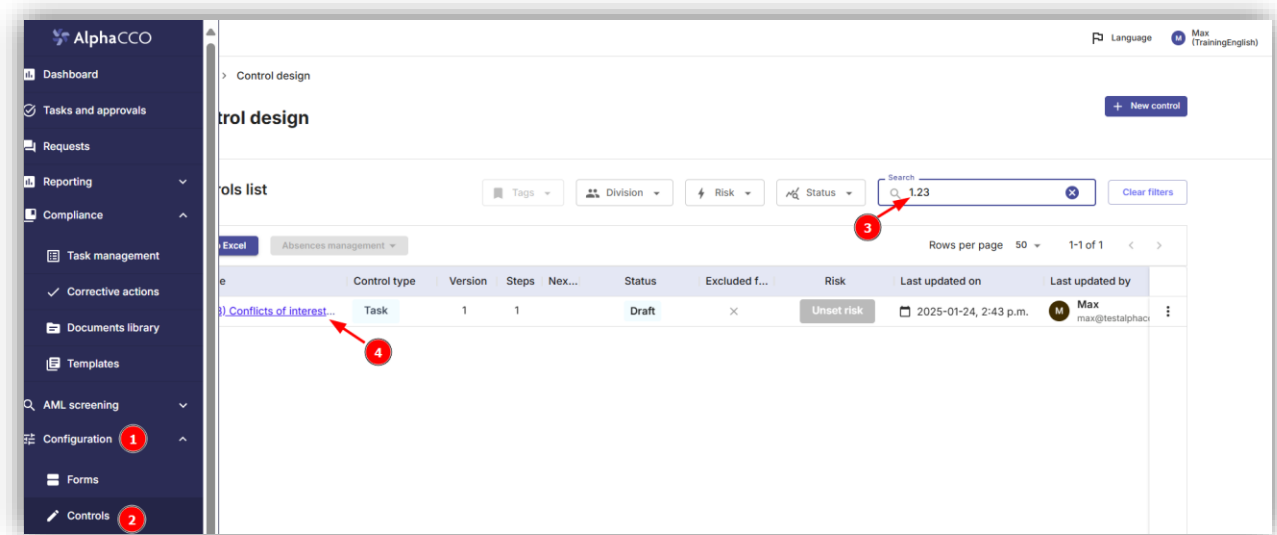
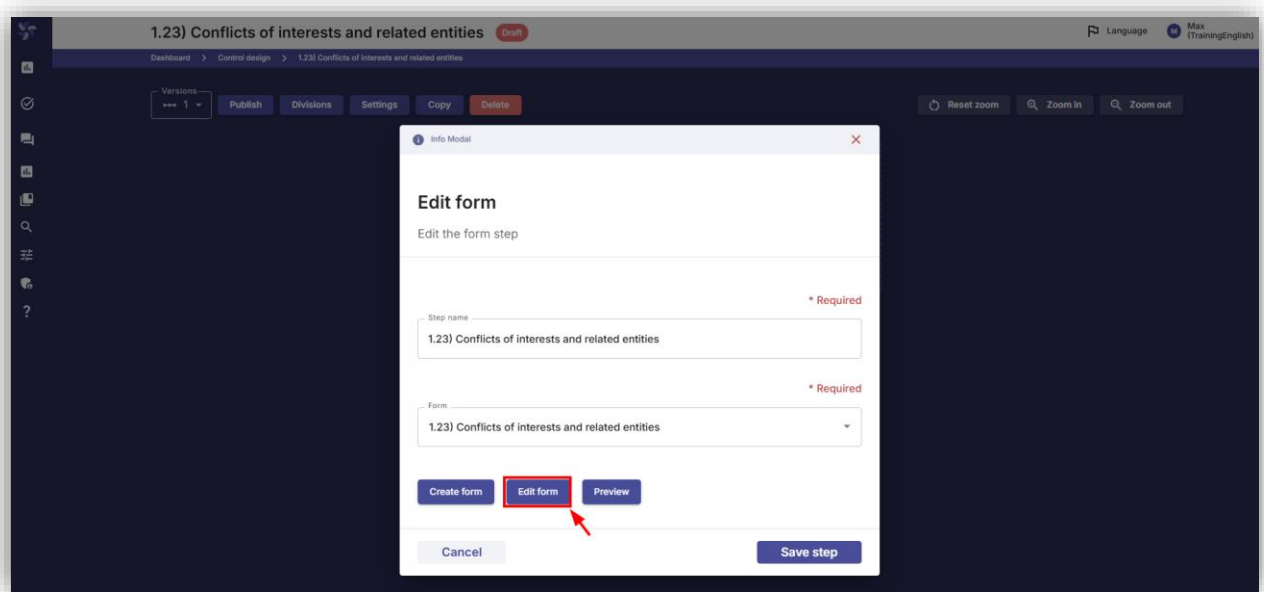
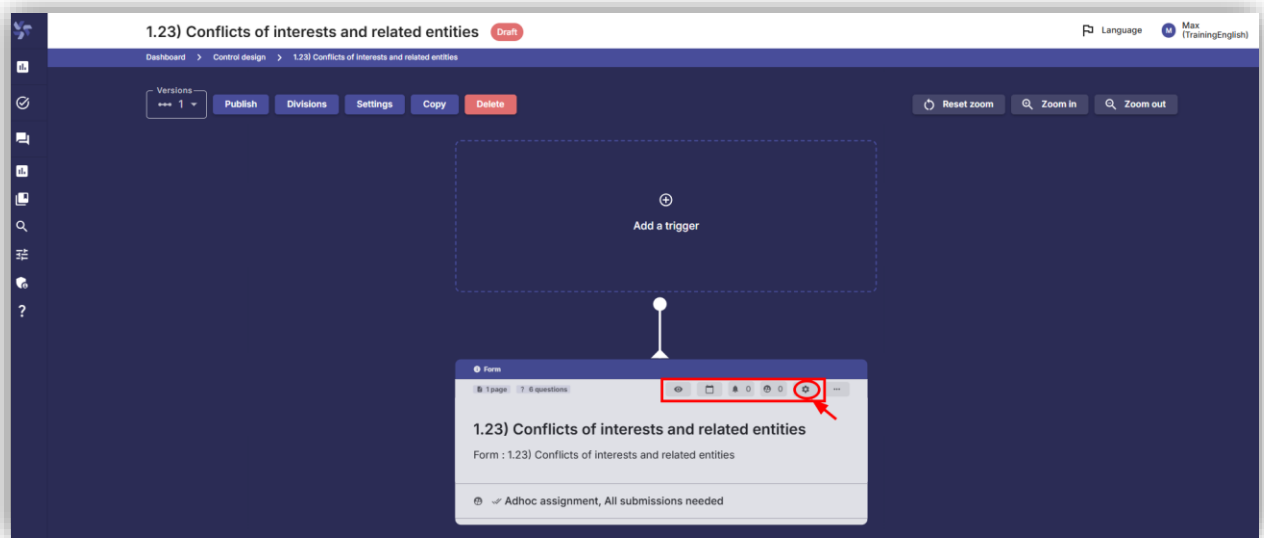


Figure 4: Controls menu page under Configuration

STEP 5

Click on the **Modify form** button, then select **Modify form** again to make changes to the form.



Figures 5 and 6: Form modification windows

STEP 6

Select the **Settings** tab to modify instructions or attach instruction documents.

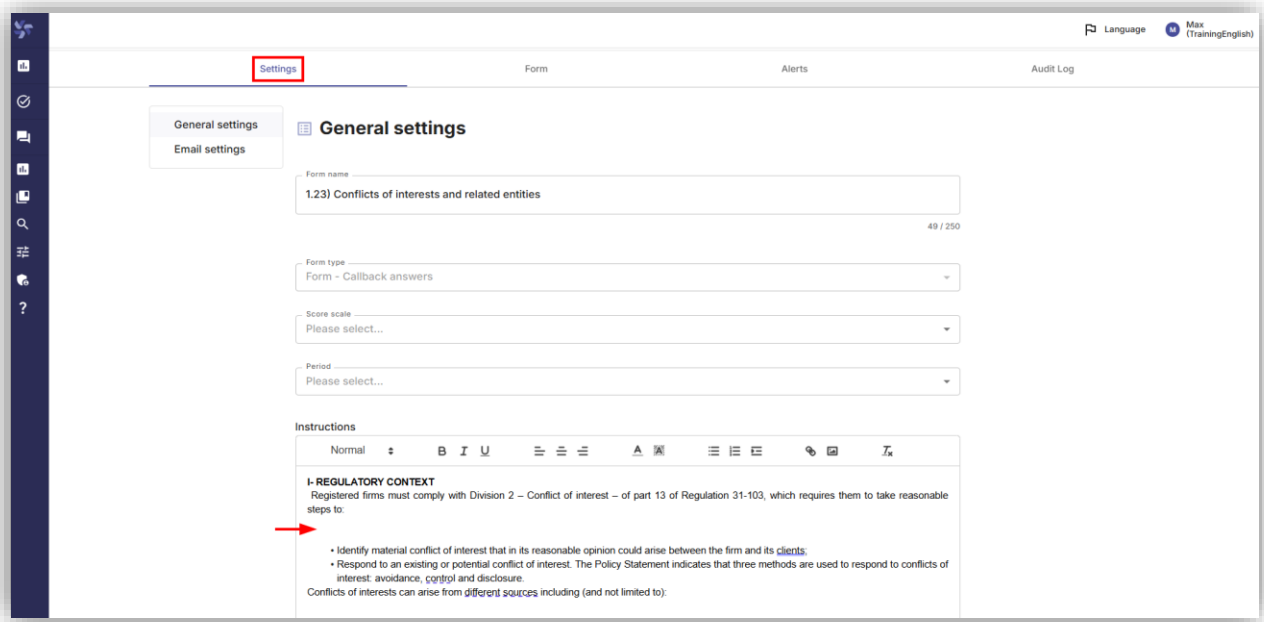


Figure 7: Settings tab page of the copied template form

Select the **Form** tab to modify question statements, add or delete questions as needed.

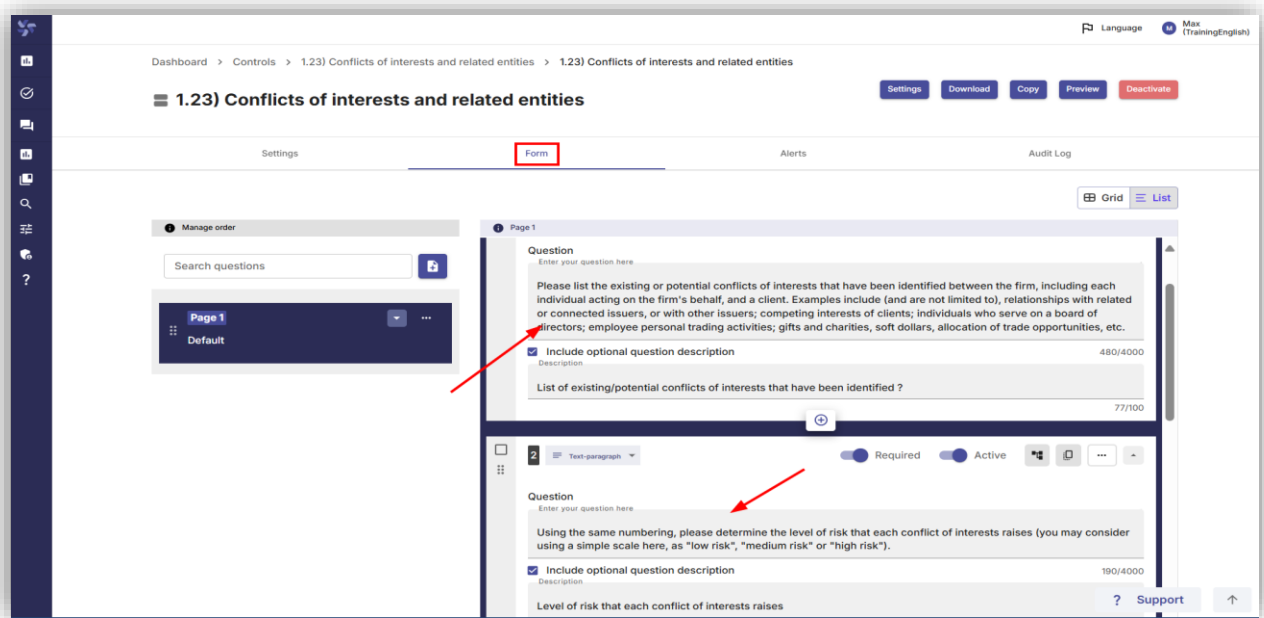


Figure 8: Form page of copied template with questions

STEP 7

Click on the control name in breadcrumb trail to return to the copied control template.

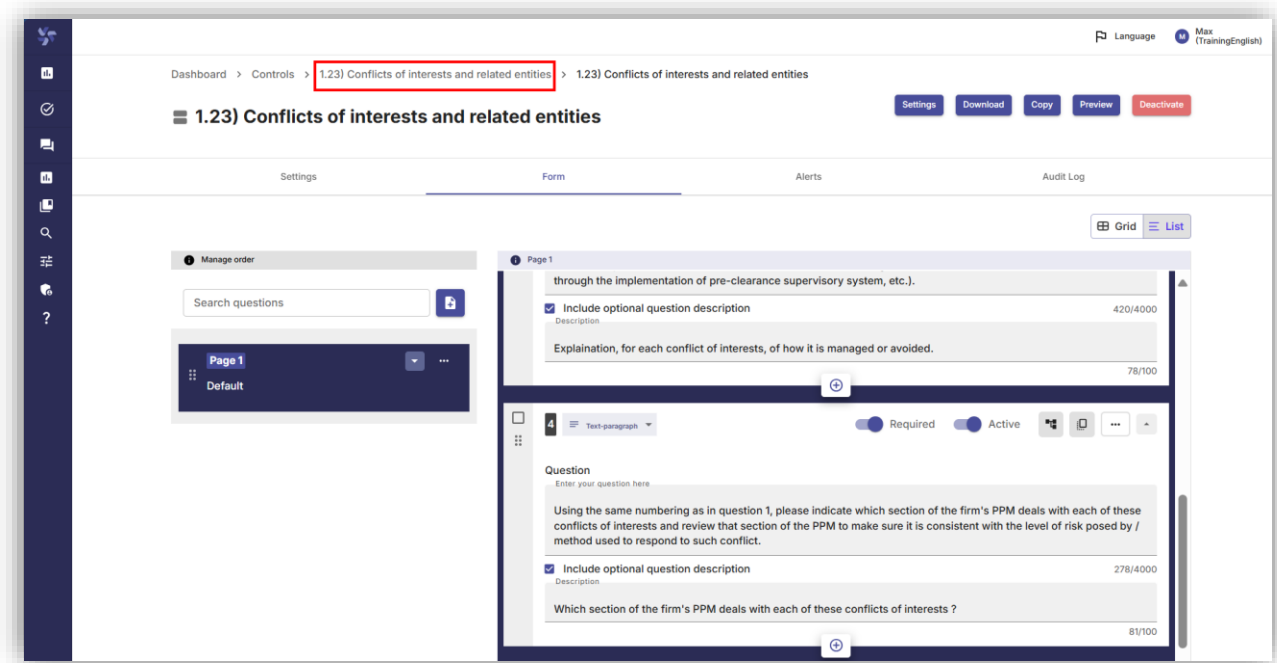
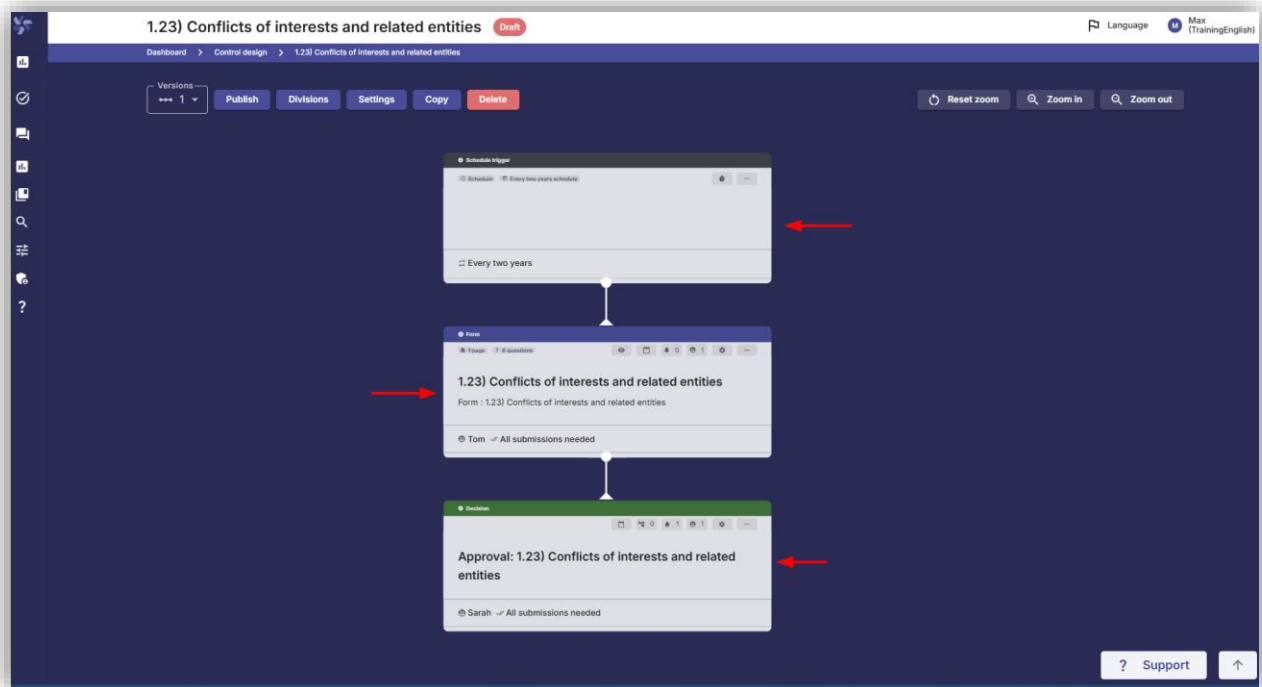
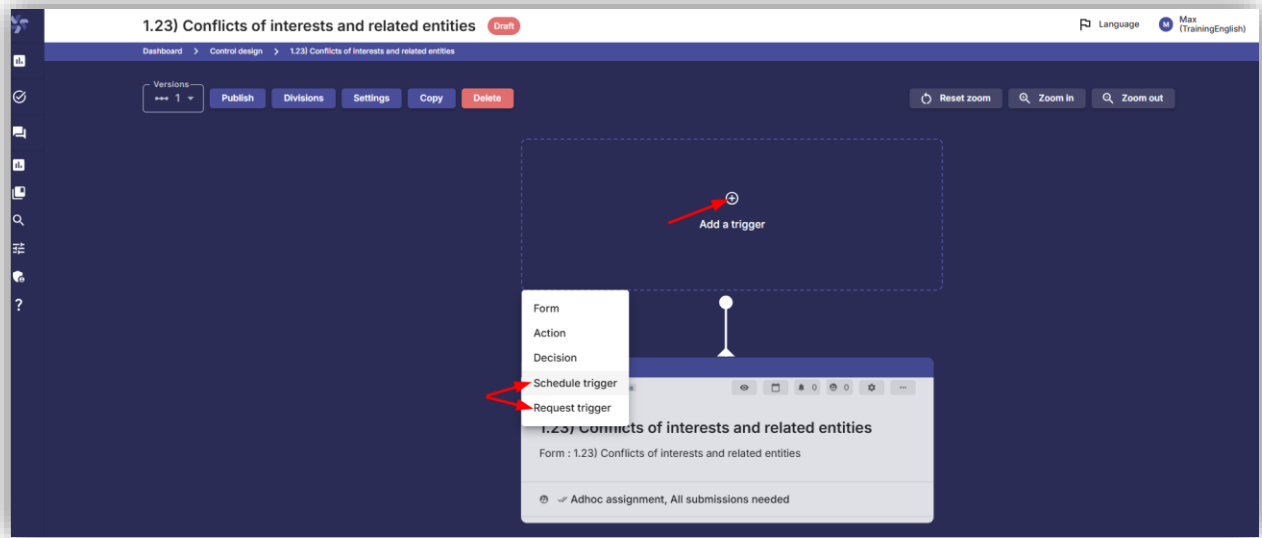


Figure 9: Back to copied control button page.

STEP 8

Click on the control name to return to the copied control template. In the copied control, you can:

- Add if you wish a scheduler trigger for task-type controls or the request trigger for request-type controls.
- Modify assignment and decision parameters to suit your needs.



Figures 10,11: Control copy page with changes to be made

STEP 9

Once you've made all the changes you need, click on the **Publish** button to activate your copy.

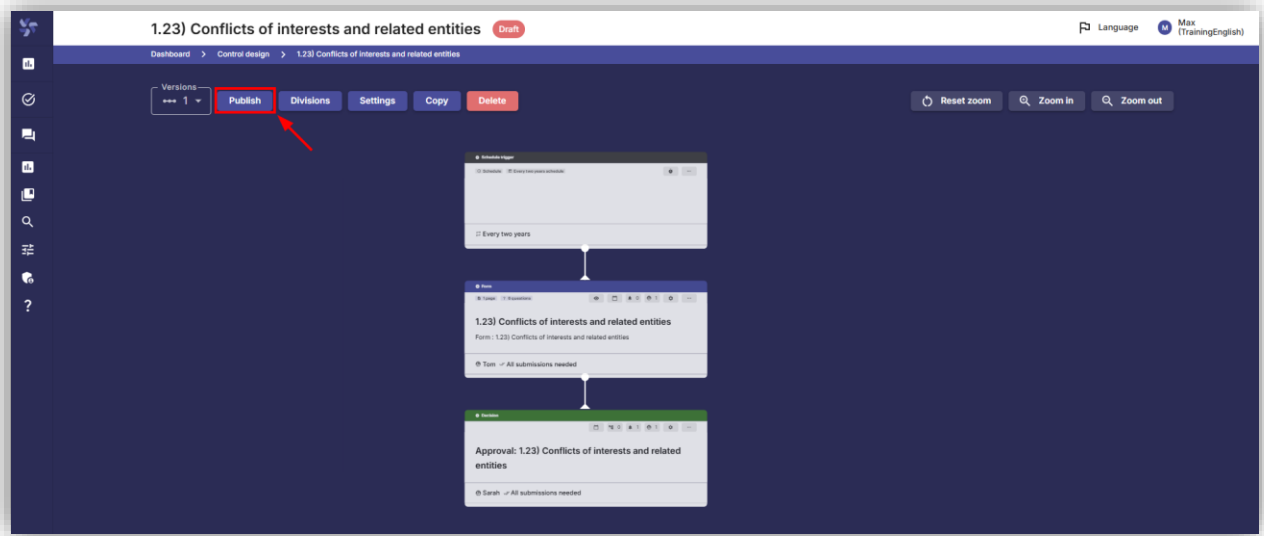


Figure 12: Control copy page with Publish button for activation

NOTES

Please note that this document is only a brief guide. The AlphaCCO support team will be happy to assist you if you require further guidance. Please do not hesitate to contact us at support@alphacco.com