

Configure Favorite Form Types

Add or remove forms as "favorites" so they are easy to access on any screen. This is a personal preference, so you won't affect any other users.

Overview Edit your Favorite Form Types

Overview

In each project, you can define your "Favorite" form types so they are easy to access on any screen. Your favorites will show at the top of your project homepage and in the left navigation bar under the "Forms" link.

Inv	energy	082021 ProjectTeam Training Project -	Search project forms	Q	Support Page 😨 - 💢 -	PT Administrator 🗸
Aroject	F	ProjectTeam Traini	Project		Project Administration	
Forms	-	★ Favorite Form Types ⑦			Edit	
Ē		Change Orders	Contract Exhibits	Contracts	Deliverables Tracker	
Files		Exhibits/ Attachments Log	Incidents	Payment Applications	Project General Information	
٥	L	Requests For Information				
Photos		Action Items Assigned To Me	Create	New Recent Photos	Configure	
Reports						
Directory						
,			Nothing is assigned to you			
Colordar			project will show here. Have something you want to track? Crea on Item and assign it to yourself.	te		
Inv	energy	082021 ProjectTeam Training Project -	II - Search project forms		Q. Support Page 🗹 🗸	X;- PT Admir
A Project	Form Types		g Project		Project Admi	inistration
						Edit
			Contract Exhibits	Contracts	Deliverables Tracker	
Files	Change Orders Contract Exhibits		Incidents	Payment Applications	Project General Information	
Ø	Contracts					
Photos	Deliverables Track	ker	-		_	
&	Exhibits/ Attachme	ents Log		Create New Recent Photos	c	Configure
	Incidents		°	14170		
Directory	Payment Applicati			- D-		
#	Project General In Requests For Infor		Nothing is assigned to you he project will show here. Have something you want to track'	P Create		
Calendar		/PES	Action Item and assign it to yourself.			



Edit your Favorite Form Types

Note: Favorite Form Types are a personal preference and are unique for each project. Setting your Favorite Form Types will not affect any other users.

Follow the steps below to edit your Favorite Form Types:

- 1. Navigate to a project.
- 2. On the project homepage, click the **Edit** button in the Favorite Form Types panel.
- 3. Check the boxes next to the Form Types you want to include as favorites. Uncheck Form Types to remove them from your favorites.
- 4. Click the **Save** button.

ProjectTeam	Bull Run Solar - All - Search project form	6	Q	🕼 • 🛛 🗶 • Joshua Witmer •				
Angent Respect	* Favorite Form Types ®	Field Reports Payment A	D Requests	Est. For information				
1) ***	Recently Created Forms 🕲			View All				
elle Reports	My Access Subject 0 Shared Budget Amendment	Form Type 0 Budget Amendment	Created On © Share 7/24/20 2:07 PM 1	Vev				
Divectory	Shared RR 002	Request For Information	7/23/20 9:19 AM					
e	Shared RR 001	Request For Information	7/14/20 1:07 PM	Edit				
Celentar	Shared Door Hardware Shared Hardware	Submittal Item Specification	7/14/20 107 PM	Edit				
	Project Administration							
	Project Setup							
	Project Details Manage general project information such as project name, number, start and end date.	Share Groups Group together similar users to help set up sharing, access, and workflow rules.		thing that				

