

CUSTOM APPS

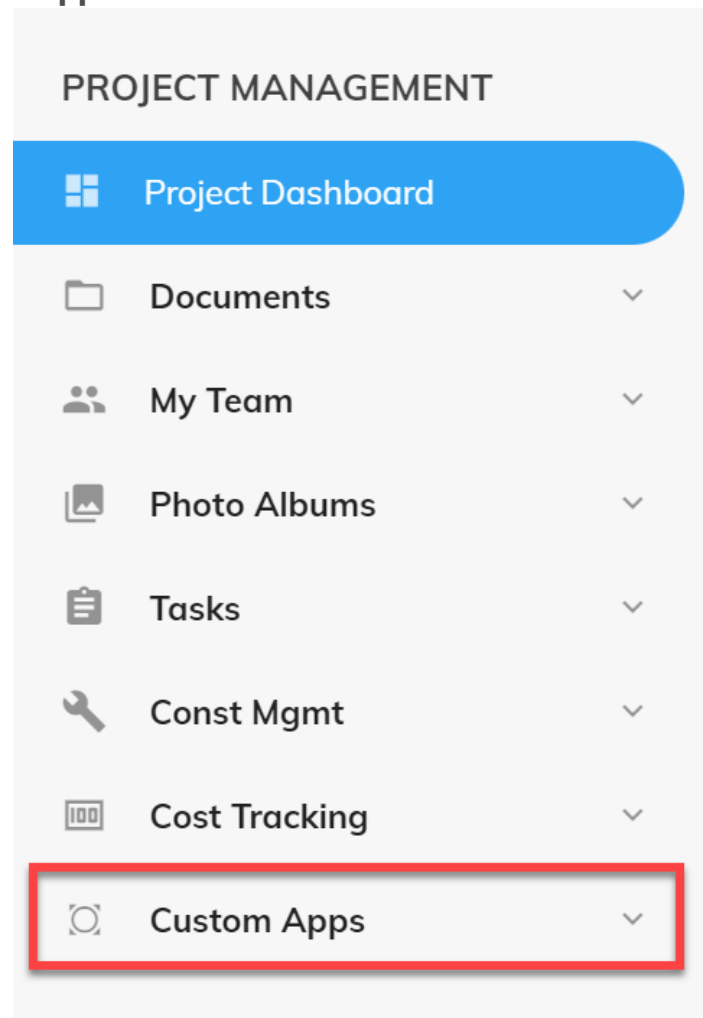
What Is The Custom Apps Feature?

Some organizations have specialized forms that don't directly align with any of the standard apps in Projectmates. To handle these Projectmates offers its Custom App tool that allow Site Admins to build the forms.

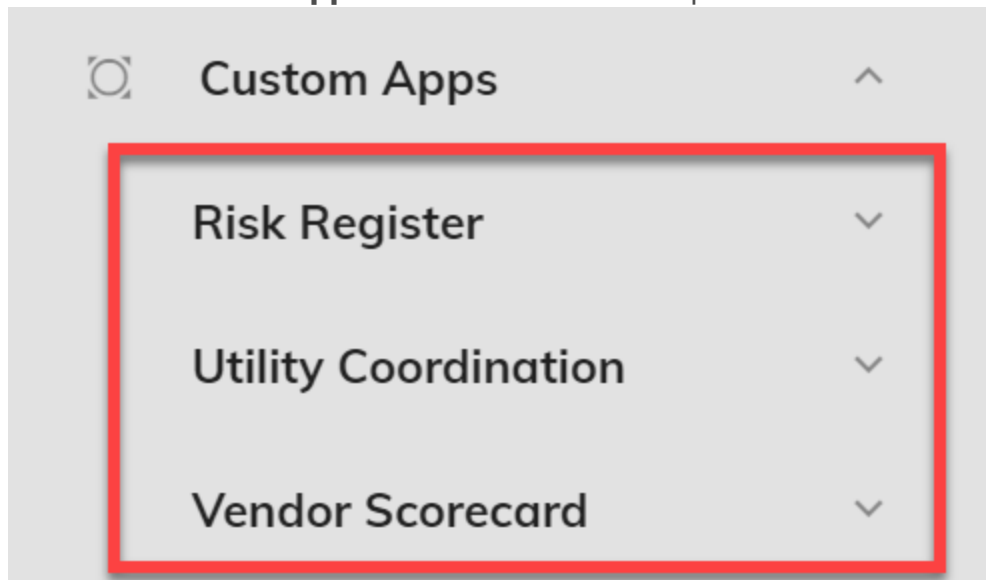
Navigating Custom Apps

Note: Access rights to Custom Apps are assigned by Project admins. If you need to access Custom Apps and are not able to see any Custom Apps, you should contact your Project admin.

1. From the navigation pane within a project, located on the left of your screen, click **Custom Apps**.

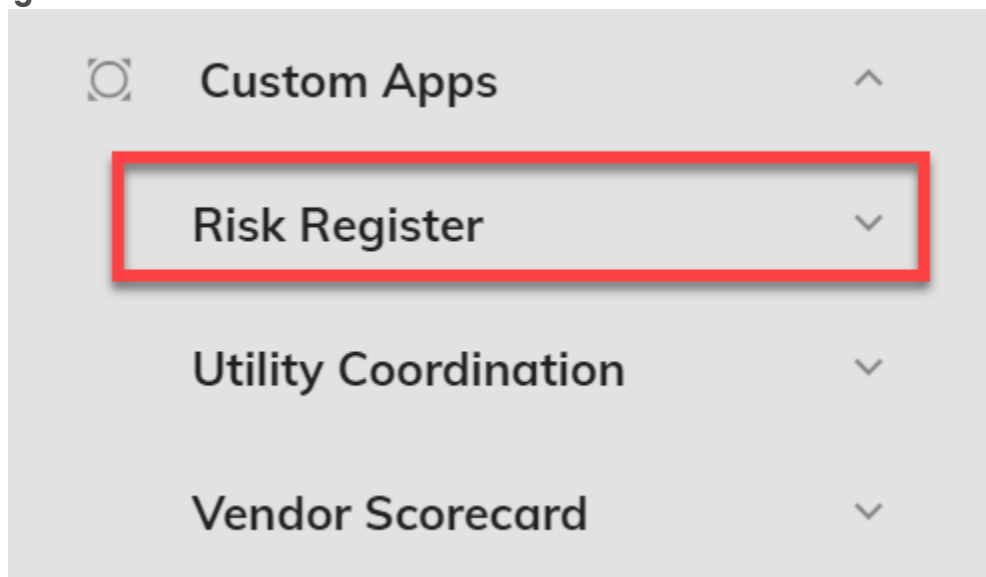


2. All available **Custom Apps** will be seen in the drop down.



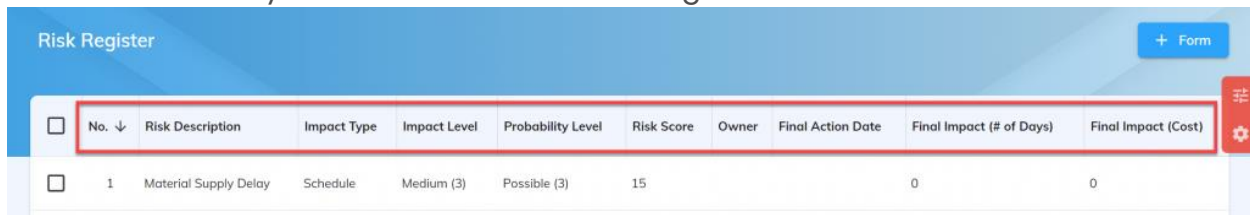
Note: Access rights to each Custom Apps are assigned independently, you might see certain Custom Apps in the navigation pane but might not see others. If you need to access certain Custom Apps and are not able to see them, you should contact your Project admin.

3. Click on the App that you want to access: In this example, let's consider **Risk Register**:



4. You will then be taken to the log screen of this Custom App that you have selected. All forms created in this Custom App will be logged here.
5. All relevant "Data Fields" from the form will be column headers (Outlined in red).

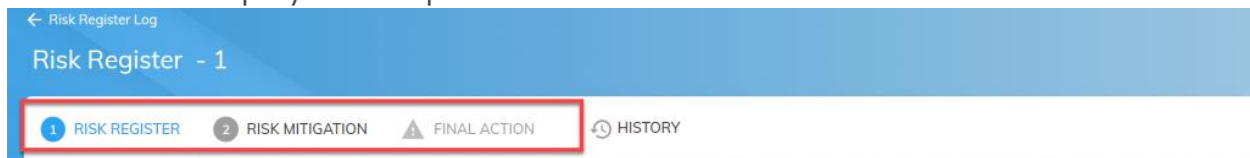
6. Click on any Column Head to sort the log based on that criterion.



No. ↓	Risk Description	Impact Type	Impact Level	Probability Level	Risk Score	Owner	Final Action Date	Final Impact (# of Days)	Final Impact (Cost)
1	Material Supply Delay	Schedule	Medium (3)	Possible (3)	15			0	0

Creating Custom Apps

1. From the log page of a Custom App, click **+ Form**.
2. Each Custom App could be set up differently. Here's a few things to take note of:
 - a. A form can consist of single or multiple pages. All page headings will be displayed on top of the form.



- b. **Required Fields** that are necessary for that form may be set up for each page. These fields will be indicated by a red asterisk.

Risk Description *

Material Supply Delay



- c. Once you have entered data in the required fields, you can save the form.
- d. Click **Save** in the top right corner of the screen.
- e. Once you save the current page, you will be able to access the next page.
- f. Each form may have an approval required. If this is the case:
 - o Select the appropriate approval type from the drop-down menu and click **Start Approval**.

 The approval process has not started.



Select Approval Type

Standard Project Approval



Start Approval

g. Make sure that you click **Save**, to save the progress.