

Manage forms to complete

Adopt a template, complete placeholders and fields, publish a version, and reconcile incoming submissions.

12 min · Context-dependent availability · 2026-09-21

Before you begin

- ✓ The Forms feature must be enabled for the community.
- ✓ View forms lets you read the inventory; Manage forms is required to create, publish and manage submissions.

SECTION 1

Read each form’s status

Open Forms. The heading shows how many signed sheets are still missing; under Forms in progress, each row distinguishes a Draft, a published form and paper copies still due.

Use Resume on a draft to return to the editor. Use Submissions on a published form. Catalogue, Submissions and Receipts, together with lifecycle actions, appear only to managers; Archive appears once at least one form has been archived.

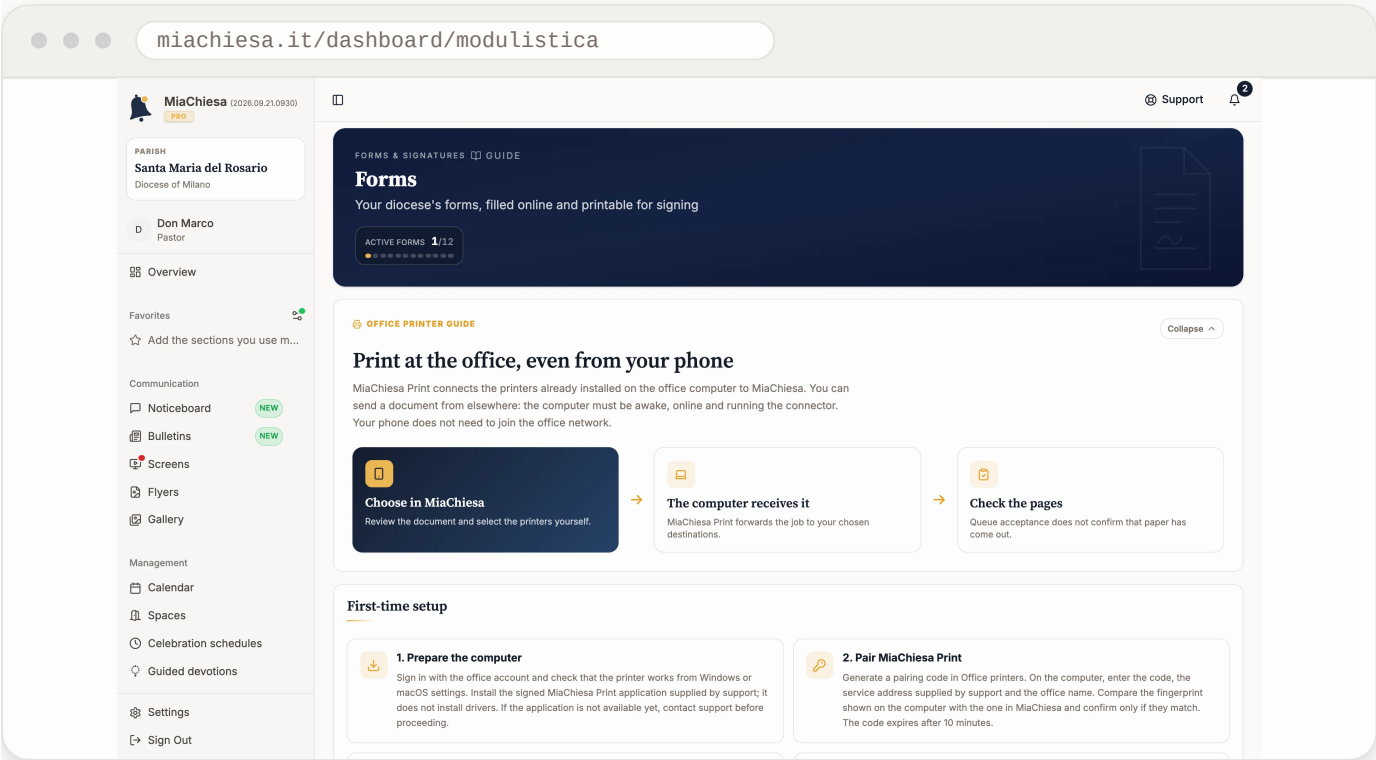


Fig. 1 The visible section shows 1 active form out of 12 and the “Print at the office, even from your phone” guide from document selection to checking the printed pages.

SECTION 2

Adopt a template from the Catalogue

If you can manage forms, open Catalogue. Diocesan templates show their source and update date; MiaChiesa templates are marked as not approved by a Curia. Use Preview to read the documents in the pack, then Use this template to create a draft.

The new draft opens in the editor. Locked template text cannot be rewritten; you can rename the form, fill placeholders, choose optional blocks, set the signing method and decide who can complete it.

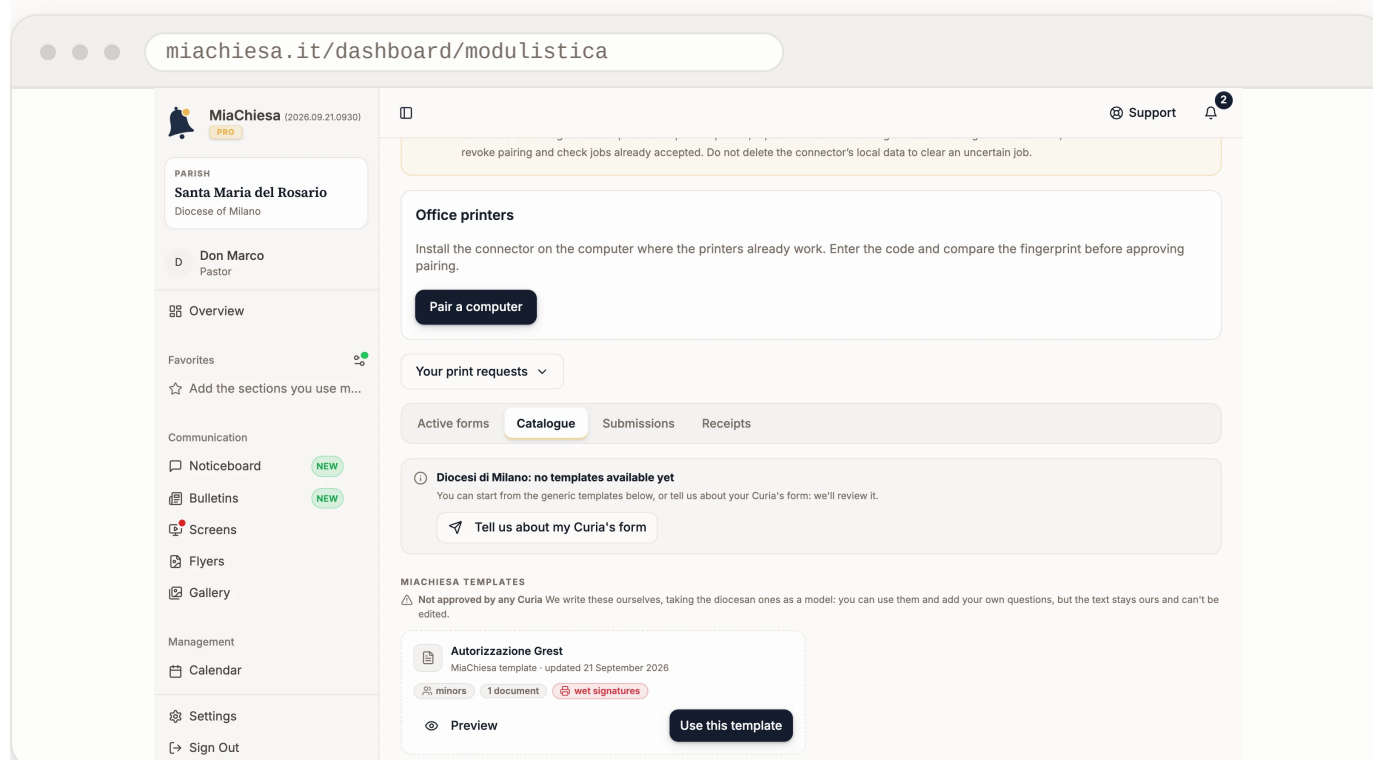


Fig. 2 The Catalogue shows the available template and controls to preview or adopt it; no draft has been created.

SECTION 3

Complete, save and publish

In Personalise, complete each highlighted placeholder with the details requested by the template. Review the optional blocks and enable only those needed for this form.

Add library or custom fields for short text, numbers, phone, date, conditional choices, email, attachments, consents or printed yes/no.

Check Preview as the family, then Save draft to keep changes offline.

Publish validates required fields, freezes the version and shows its link.

Later edits require Republish. Existing submissions retain their original version.

SECTION 4

Work through submissions

Open Submissions from a published row or from the form tab. Search by name and filter by status or Paper missing; open a submission to inspect answers, consents, signatures and template version.

When the signed sheet arrives, select Mark paper received, enter the actual signature date, optionally attach the scan, then Confirm. Export CSV and Print the paper bundle use the current filter. Sending to a configured printer appears only with the dedicated permission.

SECTION 5

Access and permissions

Who can do what

Area	Behaviour
View forms	Opens the section and inventory. A directly opened form remains read-only: no edits or submission management.
Manage forms	Shows Catalogue, Submissions and Receipts and enables adoption, editing, publishing, archiving and reconciliation.
Printers	Manage printers and Dispatch prints are separate permissions: setup and queue actions appear only with the corresponding key.

SECTION 6

Choose the correct tab

Forms in progress and Catalogue

Use Catalogue to create a draft and Forms in progress to resume it or open submissions for a published form.

Submissions and Archive

Submissions groups operational work; Archive retains closed forms, exports and sheets already received.

- ✓ An archived link stops collecting.
- ✓ Restore returns it to Draft or Published according to its history.

- ✓ A draft can be deleted or archived.
- ✓ A published form can be archived without losing submissions.

SECTION 7

Terms used

Template

The diocesan or MiaChiesa document pack from which a draft is created.

Published version

The frozen copy of documents, placeholders and fields that a family completes and signs.

Submission

A received completion with answers, consents, signatures and paper status.

SECTION 8

Frequently asked questions

I cannot see Catalogue or Submissions



View forms only exposes the inventory. You need Manage forms in the same scope to create forms and work on submissions.

Publish reports missing fields



Open the list shown by the button, complete every required placeholder and retry. A document with empty placeholders is not published.

My changes are not visible to families



Save draft does not change the online version. After checking the preview, select Republish; older submissions remain tied to their version.

What you have achieved

✓ The form comes from a verified template, has complete placeholders and fields, and is published in the intended version.

✓ Submissions and missing paper copies are reconciled without losing version history.