

# The Forms Inventory Tool 2.0

A Brief Guide to the Public Forms Tool



## Introduction

The Forms Inventory Tool 2.0, FIT2.0, is an online tool that provides public access to City forms.

FIT2.0 was developed through collaboration of the Forms Management Program operated by the City Clerk's Office and the Web Centre operated by the Information & Technology Division.

A form will only be available through the tool if:

- the division that owns it submitted it to CIMS and it was approved for use
- the form is intended for public use
- the division allows the form to be freely distributed to anyone by internet
- the division has scheduled the form to be actively available at the time you are searching for it

If you cannot find a specific form through FIT2.0 please contact the City division that owns the form. If you are not sure which division to contact, please contact Toronto's 311 service for assistance to determine which division to contact. If you are calling from within Toronto, dial 311. From elsewhere, call 416-392-CITY or 416-392-2489.



## Features of the Forms Inventory Tool 2.0 Public Interface

### Getting started

**The screen display:** As a web based tool, FIT2.0 opens in a browser. This means FIT2.0 is only a part of what is shown on your screen. Features of both the browser you choose to use and of the City's Web Content Management (WCM) tool also appear.

Unless your browser settings display elements differently, FIT2.0 is framed by a browser menu bar and WCM tool banner at the top of the page and another WCM banner appearing on the screen below FIT2.0.

**Contents of FIT2.0:** Although FIT2.0 is used to find forms it does not actually contain any! Instead, each available City form is represented by a record called a form profile. A profile contains information about the form and a web link to an instance of the form. Some profiles include links to multiple instances each in a different format such as a Word or PDF.

Some profiles also contain links to other related forms or to documents made available to support use of the form in some manner. This might include a document offering background information on a program or service or one that explains how to correctly complete the form. When you click on a link to a form or a supporting document you leave FIT2.0 as your computer opens the software used to develop the form or document.

**Up to date forms:** To ensure you always have the most current information and version of a forms we recommend that you use FIT2.0 each time you want to obtain a form rather than saving one elsewhere. That way you will have the most current version.



## Common Elements of FIT2.0

Some elements of FIT will always show on your screen no matter what features of the tool you are using. These features are described in this section.

**The Title Banner:** This element will always appear at the top of the tool displaying the words FORMS INVENTORY. As long as the Banner is displayed on your screen you know you are still working in FIT2.0. If you do not see it, you have navigated outside FIT2.0.

**The Toolbar:** This element will always appear below the Title Banner. The Toolbar's standard features and their functions are described below.

Click the **Home Button** to navigate back to the FIT2.0 home page at anytime from anywhere else in the tool.

Click the **Guide Button** to navigate to the page that displays information from the guide you are now reading.

Using any letters or numbers you choose, start a search for a form by entering words, phrases, or form numbers in the **Quick Search in Forms** textbox and then click the button labeled **Go!**.

**The Information Display Panel:** This element will always appear to the left of the screen below the Toolbar. But the size of the panel and its content will change according to the features of FIT2.0 you choose to click on and use.

**The EXPLORE bar:** This element appears below the Toolbar to the right of the Information Display Panel. It contains alternative ways to search for forms if you do not want to use Quick Search in Forms. It offers ability to view Supporting Documents divisions have made available. It also contains a link to a tool that is not part of FIT itself but will be helpful to some users: Adobe Reader.



## Additional Detail about EXPLORE bar features

### Get Adobe Reader

Acrobat Reader developed by Adobe Systems is available as free software. It permits users to view, print and annotate files in Portable Document Format (PDF). Use this link if you need to install an updated version.

### Advanced Search on Forms

This feature allows you to choose filters to apply to your search. As the number of City forms available through FIT2.0 increases, search result lists may grow longer. You can use this feature to apply one or more of the filters to produce a shorter search result list. The filters and functional buttons for this feature include:

- **Division.** This is a smart list filter which means only the names of City divisions that have submitted forms through FIT2.0 will appear for selection in this filter list. If the division whose form you are seeking is listed, depending on decisions made by that division the form might be available. However, if the division whose form you are seeking is not listed then the form will definitely not be obtained through FIT.
- **Type.** Divisional staff classify each form by selecting from a list including options such as application, consent, and survey. Use this drop list to apply those filters to limit search results.
- **Released after.** Select this filter to reduce search results if you know the approximate date a form was made actively available for use.
- **Released before.** This works similar to the **Released after** filter.
- **Search Button.** Click this button to apply the filters you selected and run a search.
- **Clear Button.** Click this button to clear all filters you added.



## Forms by Division

When you first click on this feature the presentation will default to displaying forms of the division that comes first in alphanumeric order. The features you can use to filter and scroll through results are described below. Filters can be used separately or together in whichever order you choose. Large lists will be divided amongst multiple pages and navigation tools will allow access to those other pages.

- **Filter.** Use the drop list to select a specific division. As soon as you select a division the presentation will change to display only forms from the division you selected. Similar to the division filter in the Advanced Search on Forms feature, this filter uses a smart list.
- **By name:** Click on a character from the display to filter forms whose titles begin with that letter or number. Click on **All** to remove the filter.
- **Previous / 1 / Next:** You will notice these tools above and below search result lists. The feature becomes active for use navigating between pages if a search result is more than one page. Note the display is limited to showing a maximum of eight digits. If a search result exceeds eight pages numbers may change as you scroll through pages.
- **Results:** A results counter provides the total number of forms in the results list. The number is for information only. It does not help you search or navigate. It appears on the left side of the screen below the list of forms.

## Most Popular Forms

This feature presents a list of all forms ranked by a simple count of the total number of times anyone has clicked on the form's profile through the public FIT2.0 tool. It offers a sense of which forms and profiles are viewed most frequently.

There are no additional filters to apply to reduce the list. The Previous / 1 / Next navigation feature that appears in the Forms By Division search page also appears here.



## Using the Search Results List

Regardless of the search feature you use each results list has a core group of elements presented for view:

- Form Name
- Division
- Form Number
- Type

Only the Form Name will appear as a hypertext web link. All other information will appear as simple text to be read.

Once you have a search result list with at least one item of interest the next step required to view form profile information or the form itself is always the same. Click on the hypertext Form Name. Doing so will open the Form Details View.

### The Form Details View

This feature is designed to provide more information about the form you have selected. For this feature the Information Display Panel is divided into a number of subsections.

The top section provides the **Form Name**, **Form Type**, **Languages**, **Divisional Form Number** if one exists, and also provides a link to an **Instance of the Form**. Links to forms will always appear in the same format with the words Form Instance followed by a one digit sequence number and then the word Attachment. So, if there is a single form linked to the profile, "Form Instance 1 Attachment" will appear as hypertext.

All other information is divided amongst five tabs arranged in an accordion style structure. Each is described below.

**About Form.** This tab includes customer service oriented information. It will help you determine whether you in fact do have the correct form. The tab also contains technically oriented information about the each instance of the form a division has made available. Format tells the software used to create the form, functionality lets you know whether it is a



print-only form for manual completion or allows some degree of electronic completion, and for Adobe fillable forms whether the form has additional functional features. Please note that most forms will be issued in only one instance.

**Ownership.** This tab let you know the division and business unit or section that has provided and owns the form.

**Compliance.** The information on this tab is legally oriented information.

If a form is identified as a prescribed form here it means either that the form exists because legislation states it must exist or alternatively that legislation states that the City must gather specific elements of information for a specific purpose and those elements of information are gathered by this form.

If a form is identified as collecting information for public record it means that legislation directs that information collected on the form, in some cases even information that would otherwise be protected as personal information, will be publicly disclosed in some manner as a matter of law.

The tab will also tell you whether the form collects personal information.

**CIMS.** This is information Corporate Information Management Services staff in the Forms Management Program add to the profile while conducting compliance and approval reviews on the form. Some forms have a Divisional Form Number. Every form available through FIT will be assigned a City Form Number composed of a two digit Division Code and a four digit sequence number. Over time, forms will also be assigned a Version Number composed of a four digit year code and a two digit month code. The tab will also indicate whether the form was assessed for compliance with the [Municipal Freedom of Information and Protection of Privacy Act](#) or the [Personal Health Information Protection Act](#).

**Related Supporting Document(s) and Forms.** This tab will provide links to other forms or supporting documents the division has identified as related to the form, if any. These may be other forms that should be completed with this form. Or it might be links to documents that provide important information related to the form and which help you understand matters such as how to use the form or more context about questions on the form.

It is important to emphasize that when first launched the only information in FIT2.0 will be information copied from another tool, the existing Forms Inventory Tool 1.0 which is a tool used only by CIMS staff to capture minimal information about the form during a compliance review process.





FIT2.0 is designed to publicly deliver much more information than has previously been captured in FIT1.0 about these forms. So for some time to come the data we want to provide will simply not yet exist on the form profile. But over time, more will be available as divisional staff update forms and their profiles and CIMS staff add extra information.

In future, some fields on some form profiles will still not have full information either because divisional staff determine the question does not apply to the form or they have some other reason for not providing or updating the information.

Whether you review any of this form profile information or just go straight to the form provided at the Form Instance link in the upper right hand corner of the Information Display Panel is your decision to make.

## Viewing Forms

Please note that when you click on a form link, the form will open in the program it was created in by divisional staff or in compatible software. For instance a Word document will open in Word. If your computer does not have the software required to open the form, FIT will not change that. It does not provide any adaptor to open forms and it does not provide you with a solution to compensate if your computer lacks access to required software.

When you open a form you are no longer working in the FIT2.0 tool, but it should remain open in your web browser.