

OptionForm User Guide

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1 Introduction

This user guide covers how to setup, edit, and fill in an optioneering document. Optioneering functionality is currently limited to the web portal.

OptionForm is an online system, whose primary goal is to increase the efficiency of creating, managing, and generating data related to optioneering. Reporting is done via a PDF generator, and all optioneering calculations are done at runtime.

OptionForm is based on AuditForm's framework and is robust and well established whose original release date was 2010. For information about other system functions that are not in this guide, please use the AuditForm user guide.

Optioneering, also known as a feasibility study, is a decision making process used to explore and compare a variety of different options in order to select the best possible solution to a problem. Put simply, multiple viable options are created and then systematically evaluated before committing to one.

A user may assign an importance score of between 1 and X, X being the total number of options present per criteria. Following this, a user would then assign a percentage to each criteria, with the total percentage for all criteria adding up to 100.

On completion of the optioneering document, several calculations are performed, generating a table, where each option is given a rank and percentage. The highest-ranking option is the option that should provide the highest value, and thus the first one to be undertaken.

Key Activities:

- Option generation: Users create different ways of achieving an objective.
- Criteria definition: Users create a list of criteria each option will be judged against. This could be cost, risk, complexity, time etc.
- Evaluation: Analysing each option against the chosen criteria, and scoring said options.
- Comparison: Weighting tradeoffs between each option
- Selection: Choosing the most suitable option based on the data inputted.

Typical industries that use optioneering are:

- Engineering and Construction projects
- Business Strategy and Planning
- Project Design
- Policy and Public Section Decisions



The AuditForm user guide can be downloaded via the following link:
https://auditform.com/AuditForm_User_Guide.pdf

Note, AuditForm uses slightly different naming conventions. Where OptionForm said Document, AuditForm will say Audit. Where OptionForm said Field, AuditForm will say Question.



2 System Login

To access the OptionForm system, navigate to the login page. This can be done via the button on OptionForm's homepage <https://www.optionform.co.uk> , or via AuditForm's client login <https://www.auditform.com> .

Each user will be given a username and password by the administrator that will give them appropriate access to the system.

The System Administrator administers this authentication process.

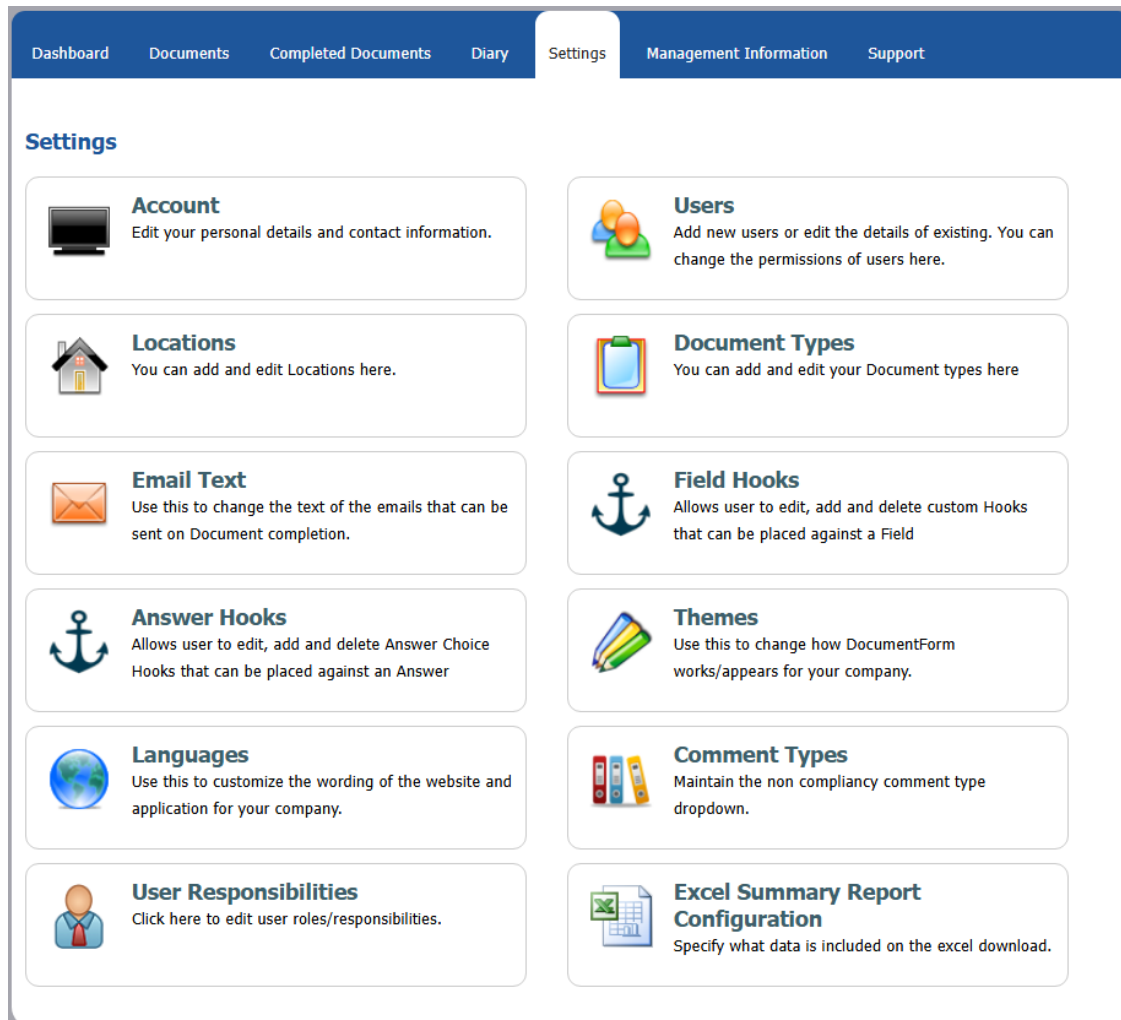
The username is not case sensitive; however, the password is case sensitive.













The 'Usernames' and 'Passwords' are managed by the System Administrator in the Settings pages.



3 Settings

The 'Settings' screen can be accessed from the menu bar at the top of the screen or from the 'Dashboard' page. Here the administrator can maintain the audit environment.



Settings	Description
 Account	Edit your personal details and contact information.
 Users	Add new users or edit the details of existing. You can change the permissions of users here.
 Locations	You can add and edit Locations here.
 Document Types	You can add and edit your Document types here
 Email Text	Use this to change the text of the emails that can be sent on Document completion.
 Field Hooks	Allows user to edit, add and delete custom Hooks that can be placed against a Field
 Answer Hooks	Allows user to edit, add and delete Answer Choice Hooks that can be placed against an Answer
 Themes	Use this to change how DocumentForm works/appears for your company.
 Languages	Use this to customize the wording of the website and application for your company.
 Comment Types	Maintain the non compliancy comment type dropdown.
 User Responsibilities	Click here to edit user roles/responsibilities.
 Excel Summary Report Configuration	Specify what data is included on the excel download.

For further details on how to add users and setup their associated permissions, please refer to the AuditForm user guide, chapter 3 Settings.



4 Setting Up an Optioneering Document Template

To setup an optioneering document, several steps need to be made to ensure the system identifies the new document as an optioneering audit.

First, the document needs to be of a document type that is classed as an “Optioneering” type.

Second, the optioneering document needs to be assigned the document type that is classed as an “Optioneering” type.

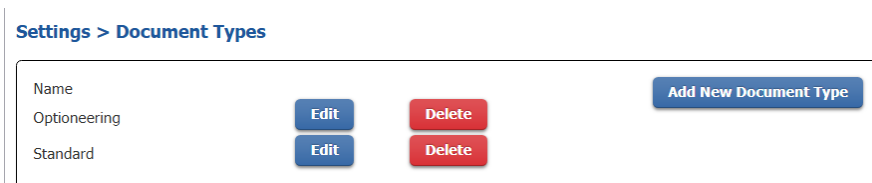
Third, an example optioneering document can be generated by creating a new document template, where the setting “Create Example Optioneering Document” has been ticked. A new document is created, and any necessary missing document hooks are automatically created.

Fourth, the optioneering document must have the expected structure to ensure the system identified the optioneering document fields used for the calculations and PDF generation.

4.1 Document Type

Document types are used define what type of document a document template is, and the settings for said document. Furthermore, document types allow users to sort on the “Completed Documents” screen for completed documents of a specific type, and are used to vary the structure of the PDF generated on the “Completed Documents” screen.

With the right user permissions, document types can be added, deleted, and edited.



To ensure that the optioneering functionality functions, please create or edit a document type. When editing or creating, ensure that “Optioneering Document” is ticked before saving the changes. This will flag the document type as an optioneering document.



Settings > Audit Types > Optioneering

Edit Audit Type

Name:

Audit Template Type:

Disable Alternative PDF Front Page:

Optioneering Document:

Comment Types

4.2 Document Field Hooks

Document field hooks are used to flag certain document fields, whose document has been filled in with data by a user, to be displayed in other parts of the system and or inside PDF reports. Document hooks can be added and edited inside the Document Hooks screen, as seen below.

Settings > Field Hooks

<input type="button" value="Add New Hook"/>		
Name	Hook Description	
Abbreviations	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Approved By	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Approver Position	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Assumptions	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Author Discipline	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Author Position	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Checked By	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Checker Position	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Client Ref	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Contract No	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Dates	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Document Status	Optioneering Hook Identifier	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

It is imperative that any document hooks that are to be used for the optioneering calculations are given the setting “Optioneering Hook”. Without this, the document field will be seen as a standard field and could result in unexpected behaviour.



Settings > Hooks > Section A

Edit Hook: Section A

Hook Name:

Hook Description:

Display on PDF:

Display on Resolutions App:

Optioneering Hook:

4.3 Example Document Generation

For ease of use, the ability to create an example optioneering document was created. This functionality, when enabled during document creation, populates the document template with the expected structure of an optioneering document.

Create Document

To create a new Document, type in a name and click the 'Create Document' button.

Document Name:

Document Code:

Document Revision:

Document Type:

Show progress bar: Yes No

Download to Device:

Allow photos to be taken:

Create Example Optioneering Audit:

Document Introduction:

Document hooks that are missing are created during the document creation process. Special note should be taken to the field text.

Any fields with the word “Optional” are fields that are not strictly need.

Note, Document hook “Section A” has the hook setting “Optioneering Hook”. This identifies this document hook as an optioneering hook and is crucial. Any defined optioneering hooks must have this setting enabled to function.



4.4 Document Template Structure

For any information on how to create document fields, the types of document fields available, and specifying document field options, please refer to the AuditForm user guide chapter 4 Audits.

Report generation and optioneering calculations are reliant on a specific document template structure. To prevent any unexpected behaviour, it is advised that this structure is followed.

Note, template structure is dictated by document hooks and their ordering in the document template.

The expected structure is as follows in order:

- “Protective Marking”
- “Client Ref”
- “Contract No”
- “Project No”
- “System No”
- “Document Status”
- “Project”
- “Subject”
- “Author Position”
- “Author Discipline”
- “Level Of Checking”
- “Checked By”
- “Checker Position”
- “Approved By”
- (Optional fields like introduction, summary etc can be placed here)
- “Methodology”
- Optioneering Hooks e.g., “Section A”
 - “Section A” weighting fields
 - “Section A” percentage title
 - “Section A” percentage text fields
- (Optional fields can be placed here)

Below is an example of what an optioneering section might look like. The displayed fields all have the field hook “Section A”, which has been defined as an “Optioneering” hook. Each section must have a different optioneering field hook. A green box surrounds each optioneering section.



The screenshot displays a document template with the following sections:

- Example Optioneering Scoring Section A (Ensure number of criteria questions match in scoring and weighting sections) [Section A]**: Contains a "Copy Fields" button and a "Toggle Page Break" button. To the right are "Edit", "Move", "Delete", and "Copy" buttons.
- Criteria A [Section A]**: Contains four "Score: 0" input fields. To the right are "Edit", "Move", "Delete", and "Copy" buttons.
- Criteria B [Section A]**: Contains four "Score: 0" input fields. To the right are "Edit", "Move", "Delete", and "Copy" buttons.
- Example Optioneering Weighting Section A [Section A]**: Contains an "Insert Field Here" button and a "Toggle Page Break" button. To the right are "Edit", "Move", "Delete", and "Copy" buttons.
- Criteria A [Section A]**: Contains a single-line text input field. To the right are "Edit", "Move", "Delete", and "Copy" buttons.
- Criteria B [Section A]**: Contains a single-line text input field. To the right are "Edit", "Move", "Delete", and "Copy" buttons.

4.4.1 Adding a New Field

To add a new document field, select "Edit" on a document template of your choosing. Each existing field in the selected document template has a button called "Insert Field Here". Any new fields inserted using this button are inserted below the field the button was pressed on.


Click "Insert Field Here". Select a type from the dropdown of field types. Note, short answers of less than 255 characters can use "Single Line Text". Any answers that include a large amount of text need to use the "Comment Box" text area type to ensure no data is lost on submission.

4.4.2 Setting a Document Field Hook Against a Field

To set a document field hook against a field, edit or create a new field. Locate "Hook Location" within the edit field screen. Within the dropdown, all available field hooks are displayed. This dropdown contains system defined field hooks, and user defined field hooks.

Note, it is important that no "Optioneering" hooks are assigned to non-optioneering questions. Furthermore, do not reuse optioneering hooks in multiple optioneering sections e.g., "Section A" hook should not be used in 2 optioneering sections highlighted by a green box on the document edit screen.



Hook Location Dates 

Field type: Client Ref

Required: Contract No


Photo Required: Dates

Photo Required on Non-Compliance/Action: Document Status

Allow photos to be taken: Introduction

Length of answer(s): killer_question

Standard Observation Options killer_section

Attach File:  No file chosen

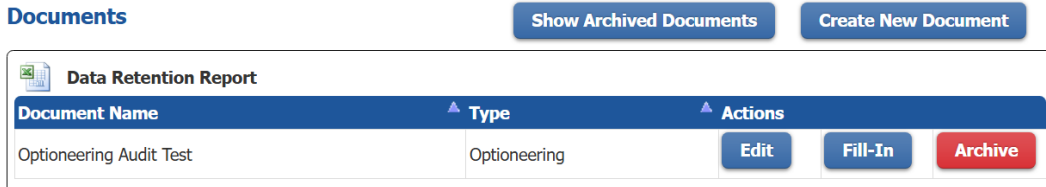
Files attached to this Field: There are no files attached to this field.

- killer_sub_section
- Level Of Checking
- Methodology
- Project
- Project No
- Protective Marking
- References
- Section A
- Subject
- Summary
- Summary / Purpose



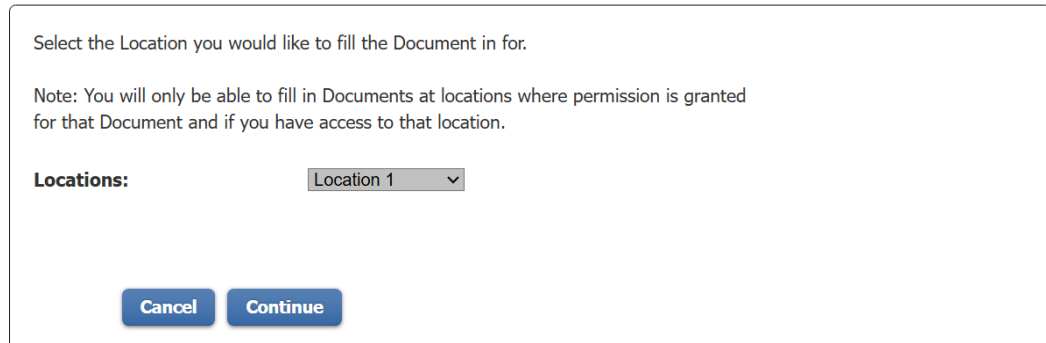
5 Populating an Optioneering Document

Creating and editing a document template are different to populating the template with data. Any data entered by a user into the empty fields inside the editing area will not be saved. To populate a finished document template, head to the documents page, and click the button “Fill-In”.



Once clicked, the user then needs to select a location the document is being filled in at. This could be the venue, or a default location. If the desired location is not present in the list, said location needs to be added via the settings -> locations page.

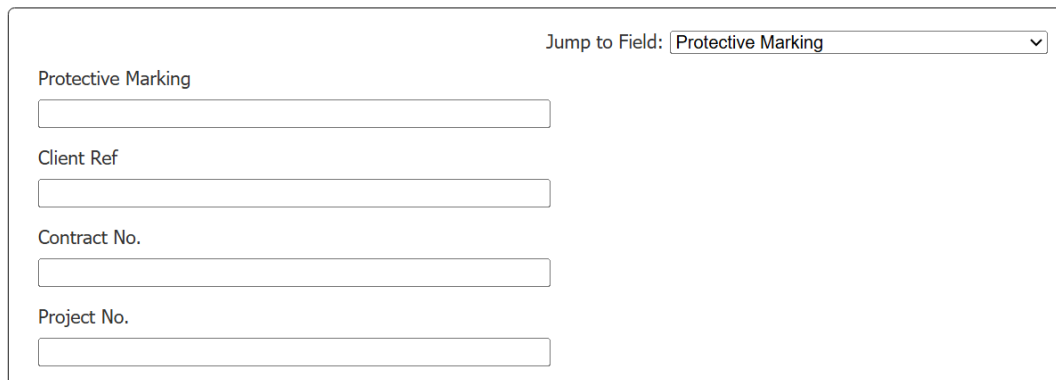
[Documents](#) > [Optioneering Audit Test](#) > [Fill-In](#)



Click the button “Continue”.

The user will then be guided through each of the document fields that may require an input. Some fields may be marked as required, and will prevent the user from continuing onto the next area of the document until an answer has been specified.

[Fill In Document](#) > [Optioneering Audit Test](#) > [Edit \(174692\)](#)



At the bottom of each document section, 3 buttons are present. “Return”, “Continue”, and “Finish”. “Return” takes the user to the completed documents screen, “Continue” loads the next section of the document, and “Finish” takes the user to the publish screen.

Note, publishing a document locks the documents content, making it read only. Ensure that all fields have been filled with the desired data before publishing the document. If a document has been published by mistake, copying the published



document via the completed documents screen will allow the content to be edited / finished.

After competing and publishing the document, the user is then taken to the completed documents screen. The following image is an example of what a user expects to see.

The screenshot shows the 'Completed Documents' section of a web application. At the top, there is a navigation bar with tabs for Dashboard, Documents, Completed Documents (selected), Diary, Settings, Management Information, and Support. Below the navigation bar, the 'Completed Documents' title is displayed. The interface includes several filters: 'Select Document' (All Documents), 'Status' (All Live Documents), 'Select Locations' (All Locations), 'Documentor' (Martin Hooley), a search field, and a 'Date Range' (01/04/2025 to 31/03/2026). A table lists two documents:

Ref #	Document Name	Location	Date	Status	Documentor	Score		Select All
174691 (174689)	Optioneering Audit Test	Location 1	16 March 2026	Unpublished	Martin Hooley	0/0 100%		<input type="checkbox"/>
174689	Optioneering Audit Test	Location 1	16 March 2026	Compliant	Martin Hooley	0/0 100%		<input type="checkbox"/>

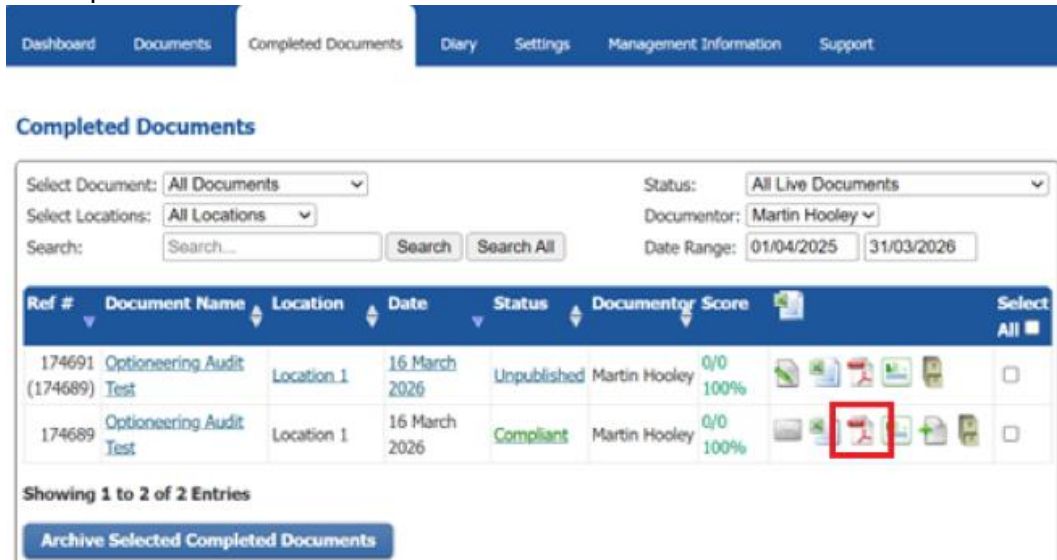
Below the table, it says 'Showing 1 to 2 of 2 Entries' and there is a button labeled 'Archive Selected Completed Documents'.



6 Report Generation



To get a report of a completed optioneering document, navigate to the completed documents page. Once there, select a desired document type, document template, and location.

Any available completed documents for the selected search parameters will appear below the search filters box. PDF reports can be downloaded by clicking the PDF icon. An example can be seen below.



Completed Documents

Select Document: All Documents Status: All Live Documents
Select Locations: All Locations Documentor: Martin Hooley
Search: Search... Search Search All Date Range: 01/04/2025 31/03/2026

Ref #	Document Name	Location	Date	Status	Documentor	Score		Select All
174691 (174689)	Optioneering Audit Test	Location 1	16 March 2026	Unpublished	Martin Hooley	0/0 100%		<input type="checkbox"/>
174689	Optioneering Audit Test	Location 1	16 March 2026	Compliant	Martin Hooley	0/0 100%		<input type="checkbox"/>

Showing 1 to 2 of 2 Entries

Archive Selected Completed Documents

