

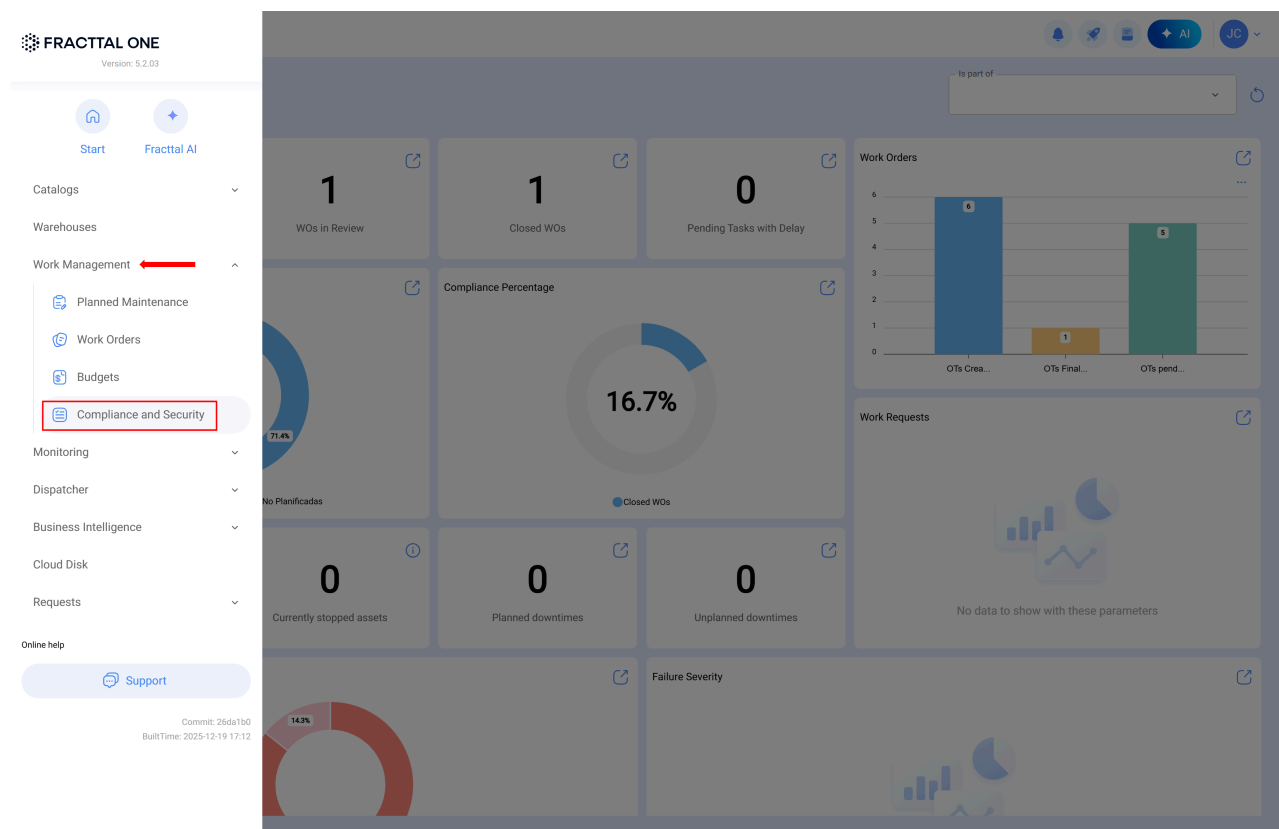
# Creating a new Compliance and Security form

[help.fracttal.com/hc/en-us/articles/41970519932813-Creating-a-new-Compliance-and-Security-form](https://help.fracttal.com/hc/en-us/articles/41970519932813-Creating-a-new-Compliance-and-Security-form)

**Compliance and Security** forms allow you to standardize operational validations before or after task execution, ensuring compliance with regulatory, safety, and internal control requirements.

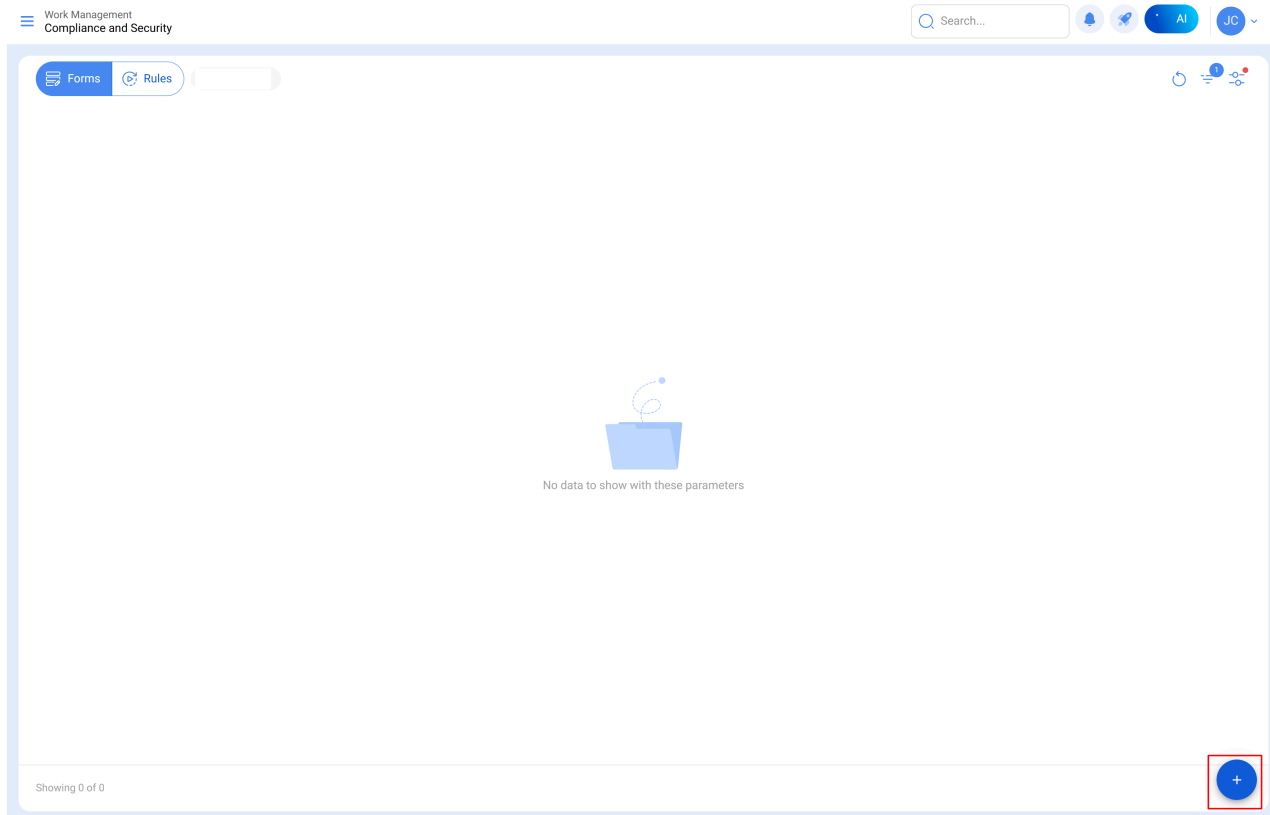
## What to do

Log in to Fracttal One and navigate to the **Tasks ► Compliance and Security** module.



## Creating a new form

Once inside, click the ( + ) icon located at the bottom right to create a new **validation form**.



## Form configuration

In the creation window, fill in the initial data that will define the identity and behavior of the form:

- **Description:** a brief summary of the form's purpose or context (e.g., "Pre-maintenance safety checklist"). This helps other users understand its use without ambiguity.
- **Type:** select the required validation type from the previously configured auxiliary catalogs.
- **Classification 1 and Classification 2:** additional categories that allow you to organize and filter forms (by area, criticality, task type, etc.).
- **Execution moment:** define when the form will be applied — pre-operational (before the task) or post-operational (after the task).
- **Required:** option to mark if the form will be mandatory to complete the task — useful when the control is critical.

Work Management  
Compliance and Security

Forms Rules Description: no X

No data to show with these parameters

Showing 0 of 0

Add Security and Validations

General Validations

Description

Description no puede estar en blanco

Type

Group 1

Group 2

Execution Moment

Execution Moment can't be blank

☐ Required

Work Management  
Compliance and Security

Forms Rules Description: no X

No data to show with these parameters

Showing 0 of 0

Add Security and Validations

General Validations

Description

Security asset

Type

review X

Group 1

Seguridad X

Group 2

rule number 099 X

Execution Moment

Pre-execution

☒ Required

Once the validation configuration is completed, review each field and ensure that the applied logic truly matches the operational scenario. Once verified, save the changes to register the form in the system.

## Form validations

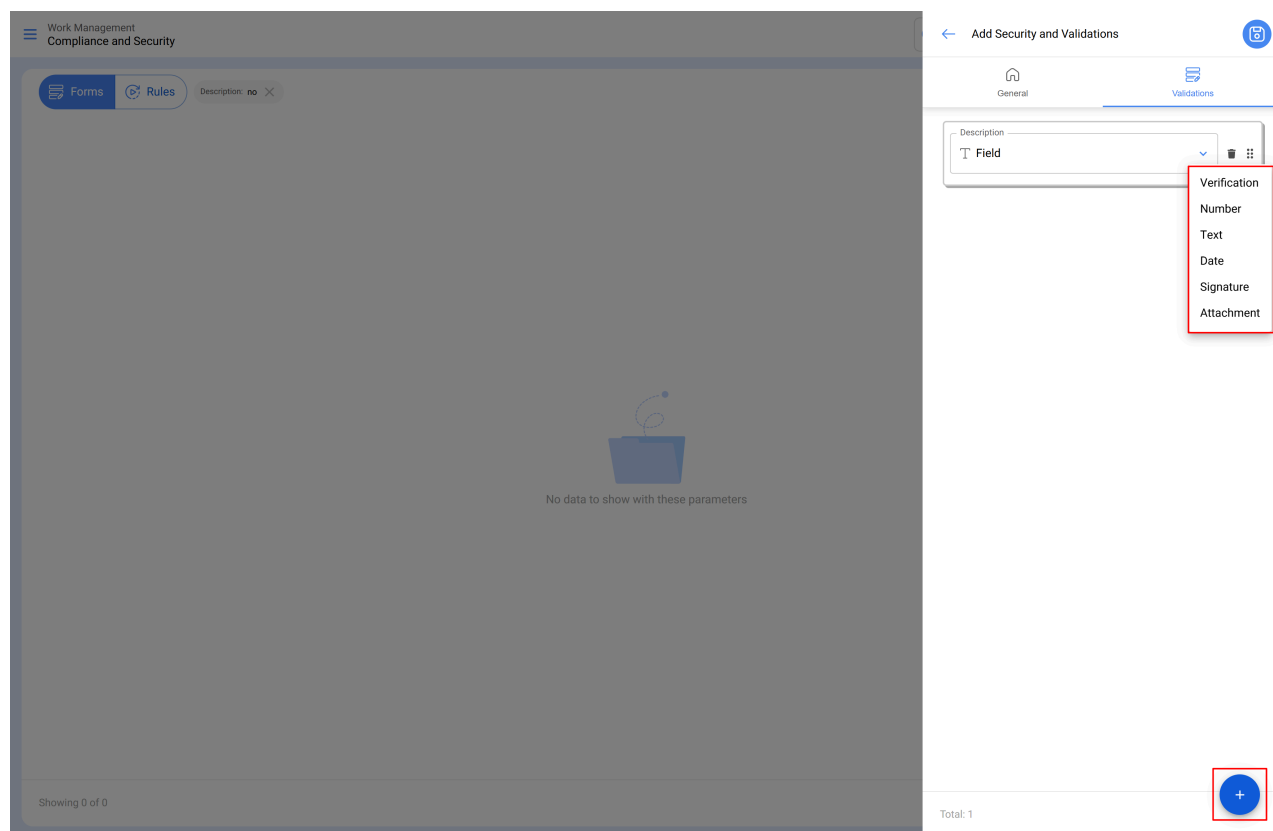
Once the general data of the form is configured, it is necessary to define the specific validations that must be met during task execution. These validations allow you to control, record, and provide evidence of compliance with operational, regulatory, and safety requirements.

Each added field represents a verification, record, or confirmation that the technician must complete before or after executing the task, according to the previously configured moment.

In the **Validations** tab of the form, different types of fields can be added as needed:

### Available field types

- Free text
- Verification (checkbox)
- Date
- Number
- Signature
- Attachment



This strategic combination allows each form to be specific, relevant, and useful for the task at hand — avoiding redundancy, facilitating compliance, and improving traceability.

The screenshot shows the 'Add Security and Validations' interface. The main area is a list of fields with a 'No data to show with these parameters' message. The right sidebar shows a list of three fields: 'Field', 'Field 2', and 'Field 3', each with a description and a dropdown menu. The interface includes tabs for 'Forms' and 'Rules', and a 'Description: no' filter.

## Best usage practices

The proper combination of different field types allows you to create specific, relevant forms that align with the task to be executed. Correctly defining the validations avoids redundancy, facilitates compliance by the technician, and improves the traceability of the information recorded in the Compliance and Security submodule.

## Types of validations

Below are the types of fields available that can be incorporated into a Compliance and Security form. The selection and combination of these fields will depend on the type of validation you wish to implement and the operational context in which the form will be applied.

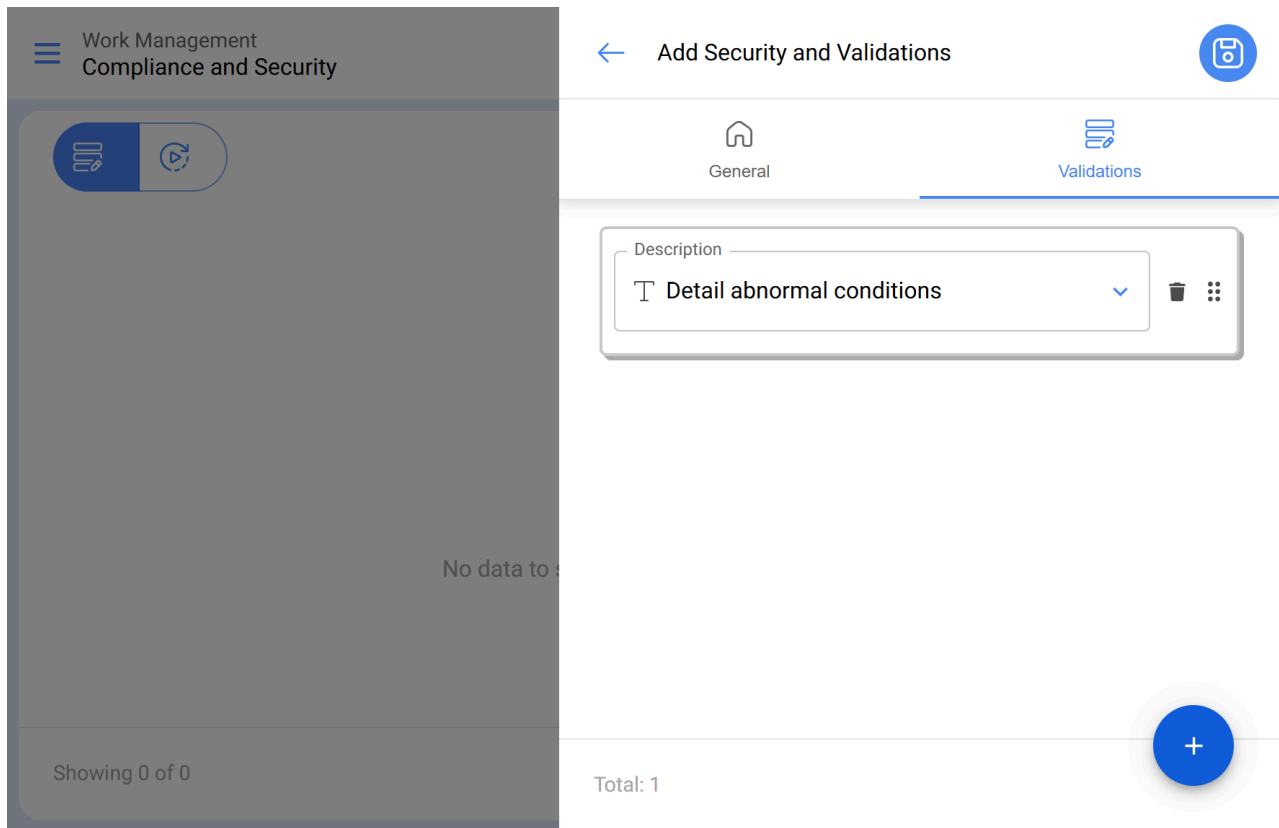
Below are the types of fields you can incorporate into your form and what they serve for in the operational context:

### 1. Free text

Allows you to enter comments, observations, or additional notes related to the validation.

Common uses:

- Note conditions found during inspection.
- Describe observed anomalies.
- Record specific instructions from the technician.

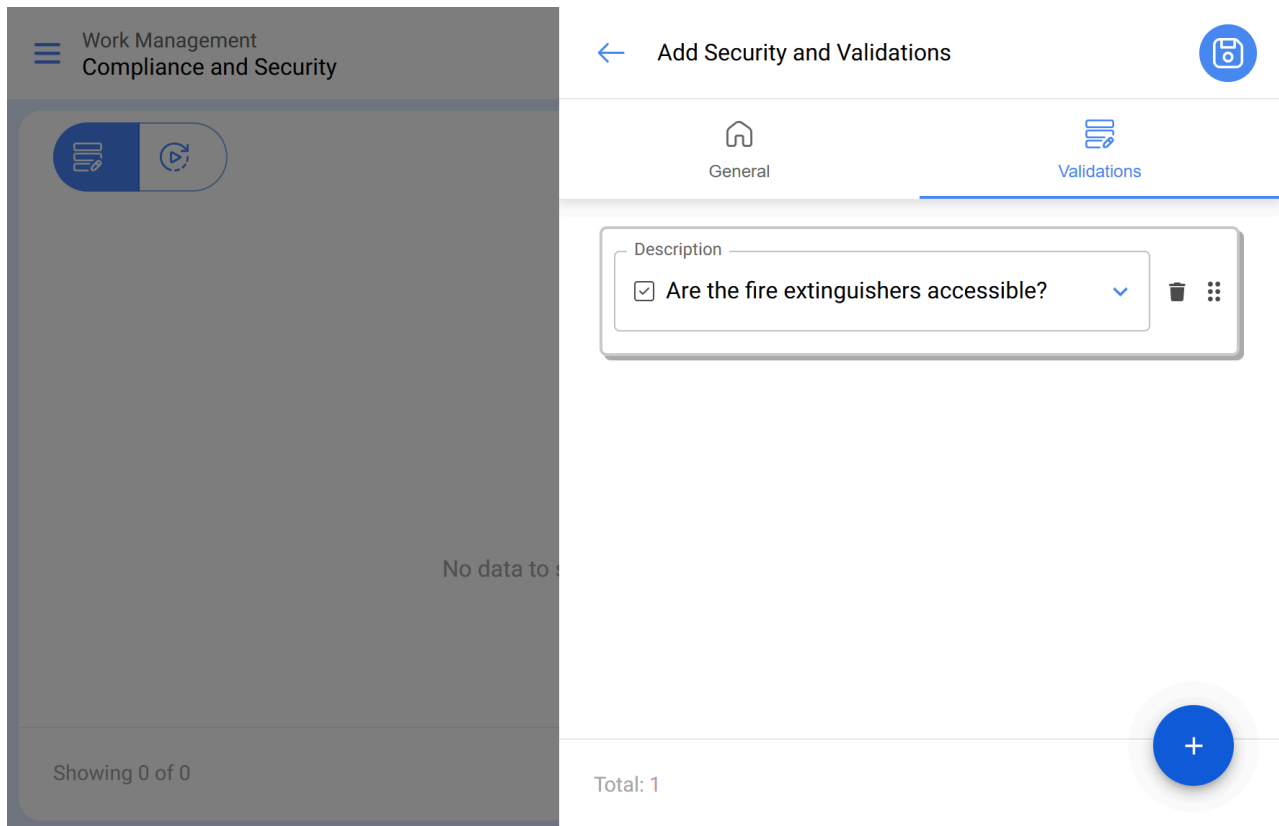


## 2. Verification (checkbox)

It is a simple selection field to confirm that an item has been reviewed, approved, or completed.

Common uses:

- Confirm that the PPE is complete.
- Validate that the equipment is free of leaks, noise, or vibrations.
- Certify that a safety protocol has been followed.

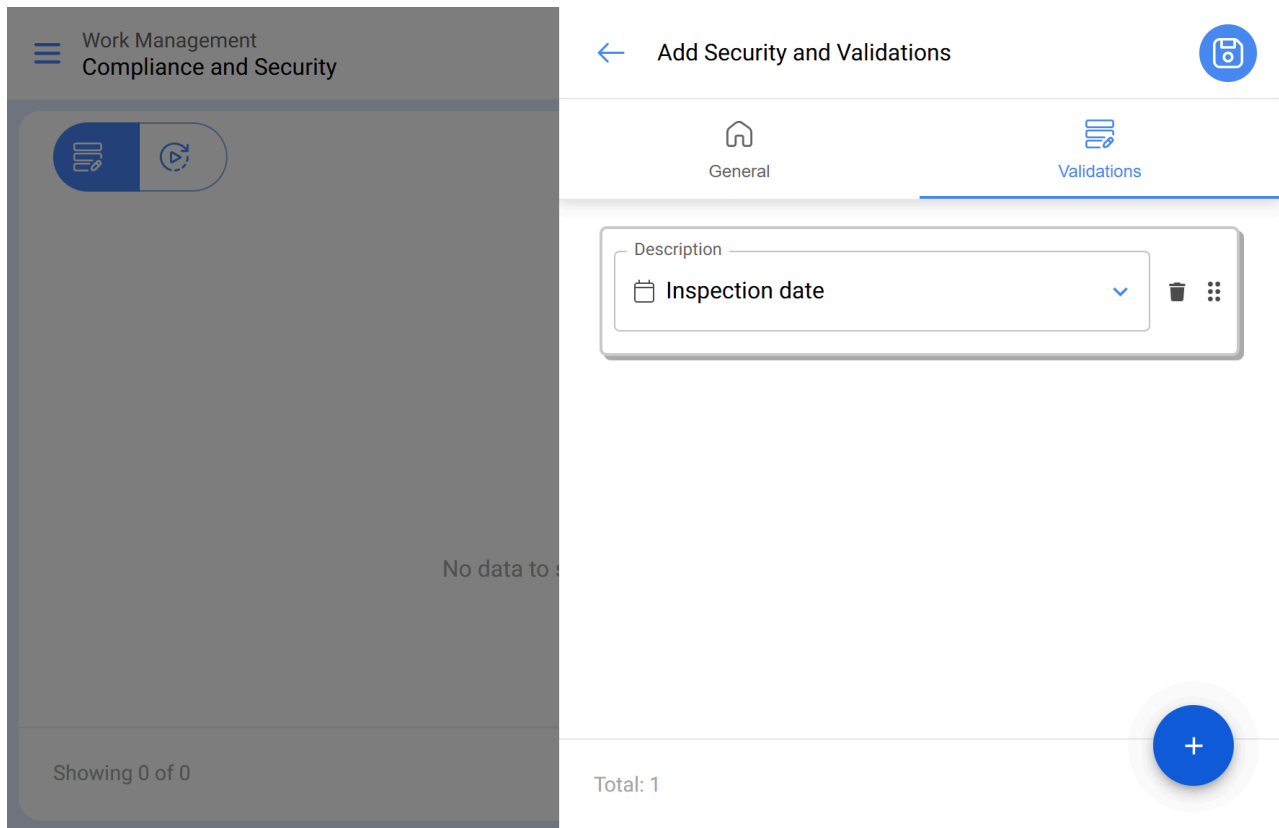


### 3. Date

Allows you to record the date (and sometimes the time) when a verification or review was performed.

Common uses:

- Record the inspection date.
- Confirm when a calibration or adjustment occurred.
- Control validations that depend on periodicity.



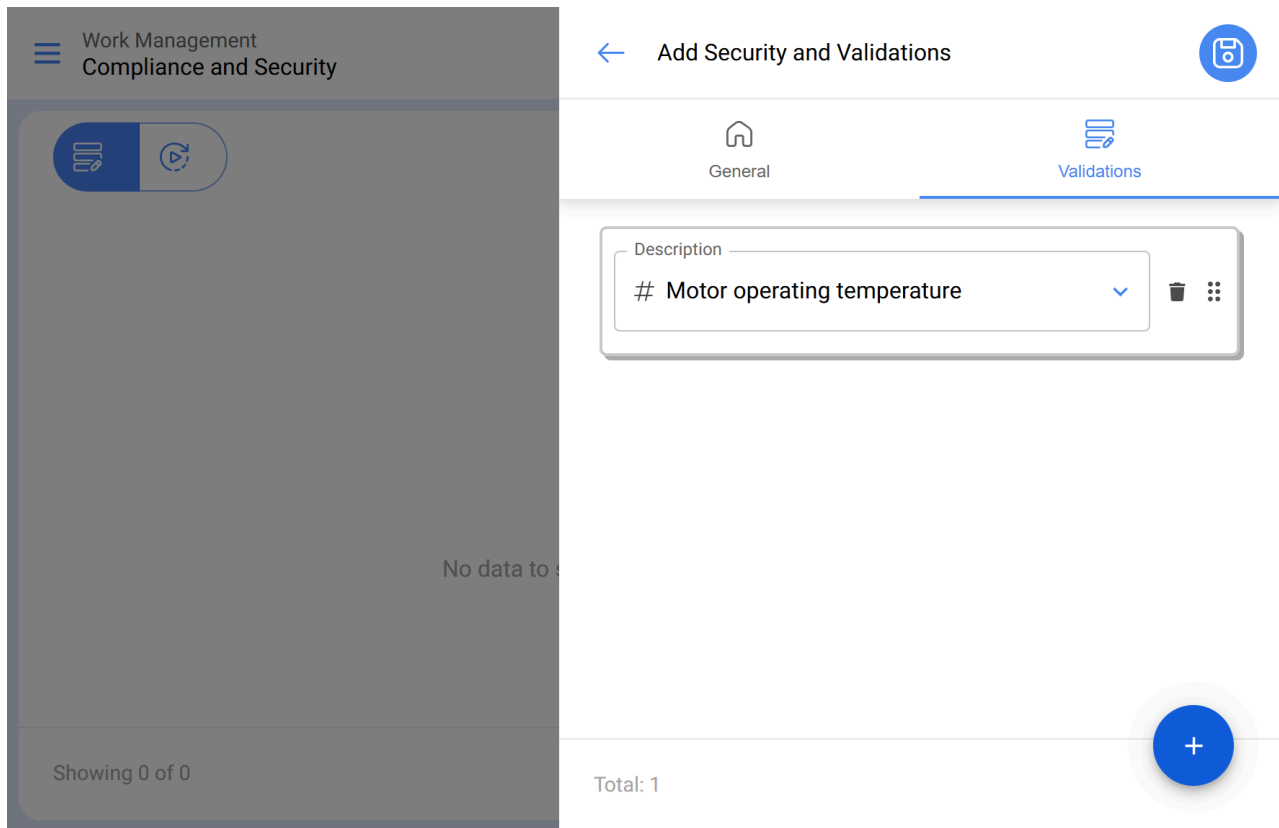
#### 4. Number

Field used to record quantitative values.

Common uses:

- Measure pressure, temperature, amperage, level, etc.
- Record instrument readings.
- Capture test or measurement results.





## 5. Signature

Allows the responsible person to record their approval, compliance, or closure of the validation via a digital signature.

Common uses:

- Confirm that the inspection was performed by an authorized technician.
- Record the supervisor's compliance.
- Validate internal audits.

Work Management

Compliance and Security

General

Validations

Description

Supervisor's signature

No data to show

Showing 0 of 0

Add Security and Validations

Total: 1

## 6. Attachment (evidence / files)

The **Attachment** field allows the technician to upload files as direct evidence of the verification: photos, PDFs, instrument reports, etc. It is a key component for traceability and visual validation of what is recorded in the form.

Work Management

Compliance and Security

General

Validations

Description

(Photo before and after a replacement)

No data to show

Showing 0 of 0

Add Security and Validations

Total: 1