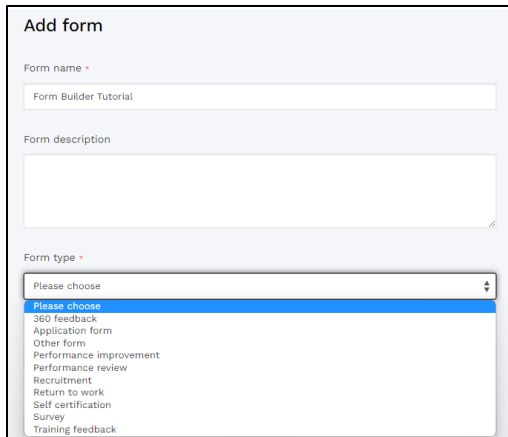


## Section 1- Form builder: Form Types

There are several types of forms that can be created.

You can access the form builder by going to **Administration → Company → Form Builder**

When adding a form, you will see a dropdown for the list of form types that you can select:



The screenshot shows the 'Add form' interface. It includes a 'Form name' field with the text 'Form Builder Tutorial', a 'Form description' text area, and a 'Form type' dropdown menu. The dropdown menu is open, showing a list of options: 'Please choose', '360 feedback', 'Application form', 'Other form', 'Performance improvement', 'Performance review', 'Recruitment', 'Return to work', 'Self certification', 'Survey', and 'Training feedback'. The 'Please choose' option is currently selected.

On this page you can also select different permissions and restrictions against the form such as visibility for employees, job roles, user access groups, usability in a workflow and status of the form.

**NB:** For a full, detailed list of the form types and their functions click [HERE](#).

### Visible to employees:

Visible to Employee is set to "Yes" if you would like the form to be visible and accessible to employees.



The screenshot shows a close-up of the 'Form type' dropdown menu. The 'Other form' option is selected. Below it, the 'Visible to employee' dropdown menu is also shown, with 'Yes' selected.

## Section 2- Form Builder Field Options – What do they mean?

To build a form in HRWize (adding form fields), go to:

**Administration → Company → Form Builder**

or

**Administration → HR → Form Builder**

Defined below are each of the fields and field types to help you build a form successfully:

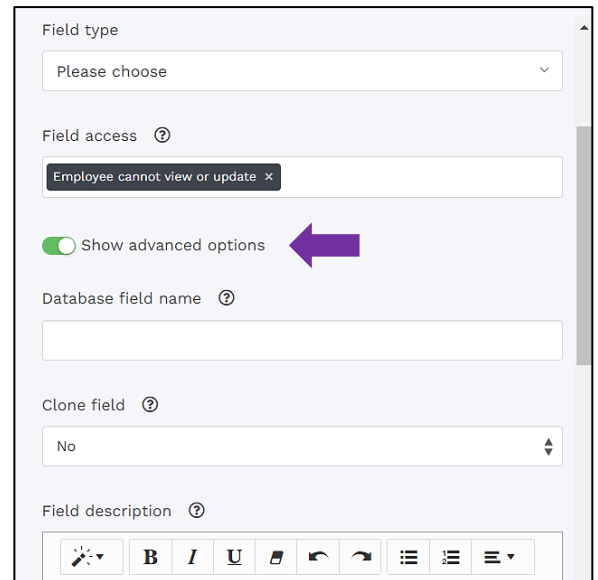
**Field display label** - This is the name for the field you want to be displayed on the form when being filled in by the user 'Title'.

**Mandatory field** - If you choose 'Yes', the form will not be submitted unless there is a value in the field.

**Field type** - There are 61 field types you can choose from. (Click [HERE](#) for more information about Field Types.)

When you click on '**Show advanced options**':

- **Database field name (optional)** - This is the name for the field in the database. If nothing is entered the system will create one automatically. This value must be unique and can only contain letters, numbers, and underscores and may only start with a letter - spaces are not permitted. For example, *employee\_name* is a valid name, but *employee name* is not. If you enter an invalid value, it will show an error when you add the field. Once the field is added this value cannot be changed.
- **Clone field** - If set to 'Yes', this field should be placed inside the "Clone – start" and "Clone –end" fields. This specific field and other fields set with the same permissions will have the ability to be cloned in the form.
- **Field description** - This is the text you can display as a tooltip icon on the form to help people understand how to fill in the field (The little question mark icon next to the field name).
- **Uneditable once completed** - If set to 'Yes', once this field has a value entered and the form has been submitted, that field will not be able to be changed again.
- **Field order** - You can use this option to manually sort the order of the fields. You do have the ability to drag and drop the fields in the form - doing this will update the field order as well.
- **Field weighting (%)** - This is where you can set a weighting value for a field. This only appears when using the *performance review form type* and when using the "score" field types. When using this, you should only use a numeric value.
- **Field access** - This is where you have options on who can see, update a field within a form



The screenshot shows a configuration panel for a field. At the top is a 'Field type' dropdown menu with 'Please choose' selected. Below it is a 'Field access' section with a text input field containing 'Employee cannot view or update' and a close button. A green toggle switch for 'Show advanced options' is turned on, with a purple arrow pointing to it from the right. Below this are three more sections: 'Database field name' with an empty text input, 'Clone field' with a dropdown menu set to 'No', and 'Field description' with a rich text editor toolbar containing icons for bold, italic, underline, link, unlink, list, and indent.

## Section 3- Field Types

When building any of the different types of forms within HRWize, there are 61 different types of fields which can be created. Each of the different field types define how the question is asked and how the answers will be received.

### Commonly Used Fields

1. Date Field - A date picker field
2. Text area - A multi-line text box (like Field description)
3. Text box – single line - A standard single line text box (like Field display label)
4. File upload – A field which will allow attachments to be uploaded to this form.
5. Electronic Signature – A field which allows an electronic signature to be used by the user.

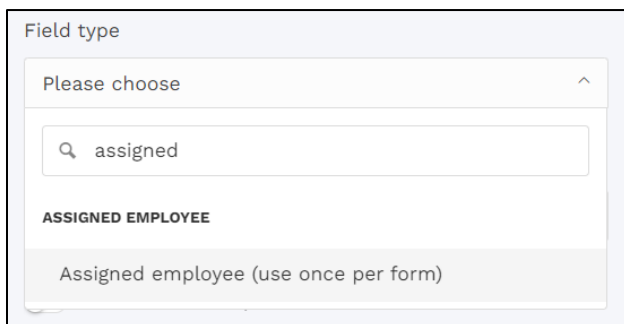
**NB:** For a full, detailed list on Field Types and their functions click [HERE](#).

## Section 4 – Quick Reference Tips

In order for most forms (excluding "survey forms") to be accessed correctly it must have an "Assigned to" field. It must also include a "Completed" field. Completed fields allow the forms to move forward whether stand alone or within a workflow. Without a completed field the form will remain unfinished.

### Assigned to Field:

This field should be used on all forms of type "Other" or "Performance Review" to ensure that the form is correctly associated with the employee to whom it refers. It will populate automatically once the form is associated to the employee through workflow or added manually.

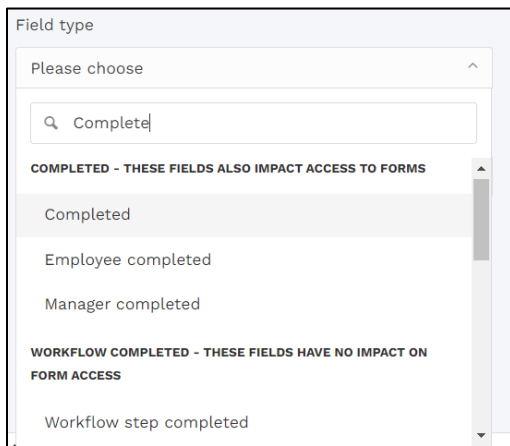


The screenshot shows a 'Field type' dropdown menu. The top part of the menu is a search bar with the text 'Please choose' and an upward arrow. Below the search bar is a search input field containing the text 'assigned'. Underneath the search input, the text 'ASSIGNED EMPLOYEE' is displayed in bold. At the bottom of the dropdown, the text 'Assigned employee (use once per form)' is visible.

## Completed Fields:

Completed fields are used in forms to mark the completion of a section or of a whole form. They can also be used to progress workflows when the form is used as part of a workflow. They take the form of a dropdown containing the values "Yes" and "No"

1. Completed - A yes or no field which marks whether or not the form has been completed overall. Selecting yes in this field will lock down the form and mark it as complete indefinitely.
2. Employee Completed - A yes or no field which marks whether or not an employee has completed this specific form. This will lock the form for employee once submitted.
3. Manager Completed – A yes or no field which marks whether or not the employee’s line manager has completed this specific form. This will lock form for manager once submitted.
4. Workflow Completed or Electronic Signature Workflow Completed – A yes or no field which marks whether or not the form is completed **solely for the purpose of marking the workflow step as completed** when the form is part of a workflow. If used as part of a form not in a workflow, then this field functions like a Yes/No.



Field type

Please choose ^

Complete

**COMPLETED - THESE FIELDS ALSO IMPACT ACCESS TO FORMS**

Completed

Employee completed

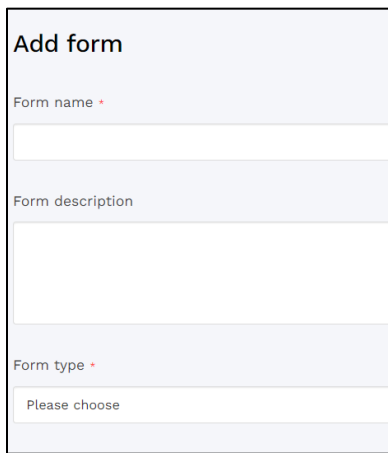
Manager completed

**WORKFLOW COMPLETED - THESE FIELDS HAVE NO IMPACT ON FORM ACCESS**

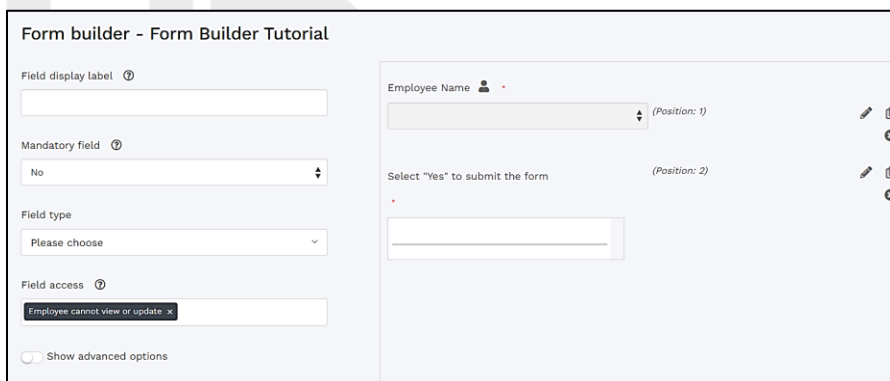
Workflow step completed

## Final Section – Basic step-by-step on how to create an “other” form

1. Create the form
  - a. Form Name
  - b. Type i.e. Other form
  - c. Job role accessibility
  - d. Workflow relations
  - e. Active status



2. Create the form fields
  - a. Include an employee assigned field
  - b. Include a completed step
    - i. **Completed** completed as a final step to be completed by the last user of the form.
    - ii. **Employee completed** for when an employee is completing a section of a form.
    - iii. **Manager completed** for when an employee’s manager is completing a section of a form.
    - iv. **Workflow completed** if attached to a workflow or meant to trigger a workflow.
    - v. **Electronic signature workflow completed** if attached to a workflow or meant to trigger a workflow. It can also be used as an extension of workflow completed if you need more than 5 step completed fields in 1 form
  - c. Ensure the correct mandatory fields are set
  - d. Ensure the correct accessibility to fields that need to be accessed.



## If assigned in a workflow

3. Create a workflow
  - a. Name of the workflow
  - b. Category
  - c. Workflow permissions and restrictions
  - d. Active status

### Add workflow

Name \*

Category \*

Please choose

Trigger against employees in probation? \* ⓘ

Please choose

All comments visible? \* ⓘ

No

4. Create the workflow step “Send new form” and attach the form created  
(If the form is to be sent to other recipients after the first user completes the form)
5. Create the workflow step “Send existing form” and select the previous step in the workflow which initially sent the form

### Add workflow step

Name \*

Send Form

Description

Type \*

Please choose

Form

**WORKFLOW ACTIONS**

- Send existing form
- Send existing form (externally)
- Send form which triggered workflow
- Send new form
- Yes/No including existing form

## If meant to trigger a workflow

3. Create a workflow:
  - a. Name of the workflow
  - b. Category
  - c. Workflow permissions and restrictions
  - d. Active status

### Add workflow

Name \*

Category \*

Please choose

Trigger against employees in probation? \* ⓘ

Please choose

All comments visible? \* ⓘ

No

4. Create the workflow step **“Send form which triggered workflow.”**  
(If the form is to be sent to other recipients after the first user completes the form)
5. Create the workflow step **“Send existing form”** and select the previous step in the workflow which initially sent the form.

### Add workflow step

Name \*

Send Form

Description

Type \*

Please choose

Form

**WORKFLOW ACTIONS**

- Send existing form
- Send existing form (externally)
- Send form which triggered workflow
- Send new form
- Yes/No including existing form