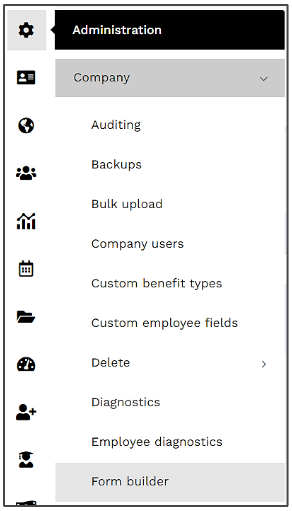
Form Builder and Workflow Creation Guide

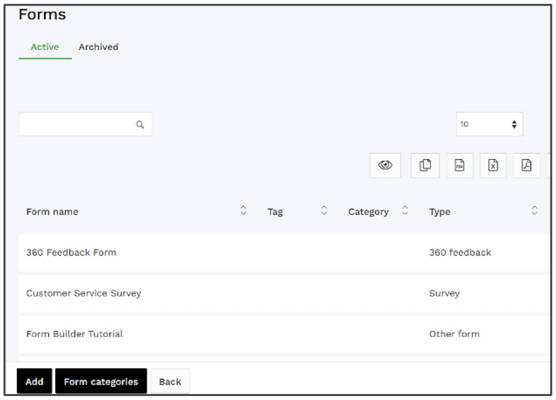
Creating a Form

Using the Form Builder module, you can create a form based on your needs to fit your style. Forms can also be configured to run parallel or trigger workflows for certain processes i.e., salary or job changes.

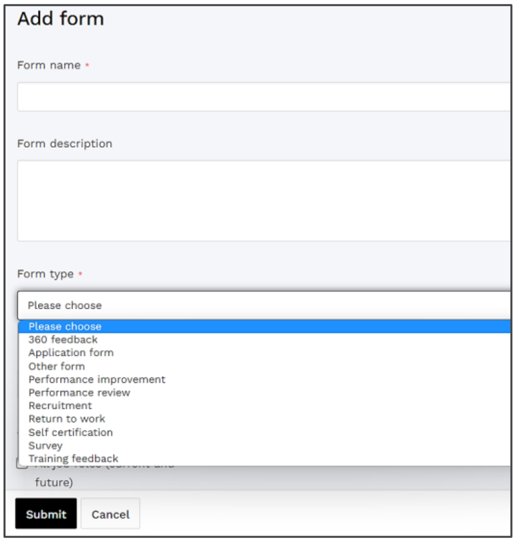
Once connected to your HRWize account, click on the "Administration" module on the left and select **Administration → Company → Form Builder**



Click **add** in the lower left corner:



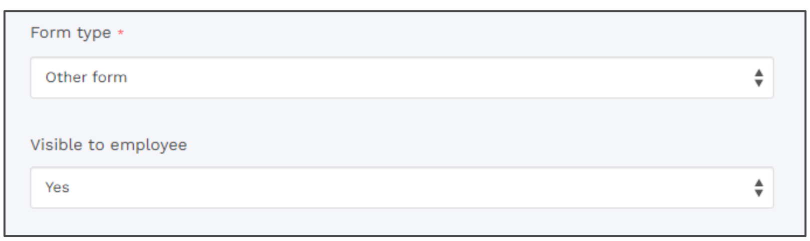
You can then start creating the form according to your own needs. You can also choose the type of form you would like to create based on the current need. (for a complete list of all form types, click HERE)



You have the option to select different permissions and restrictions against the form such as the visibility for employees, job roles, user groups, usability in a workflow and status of the form.

Visible to employees:

If set to “Yes” will be visible and accessible to employees

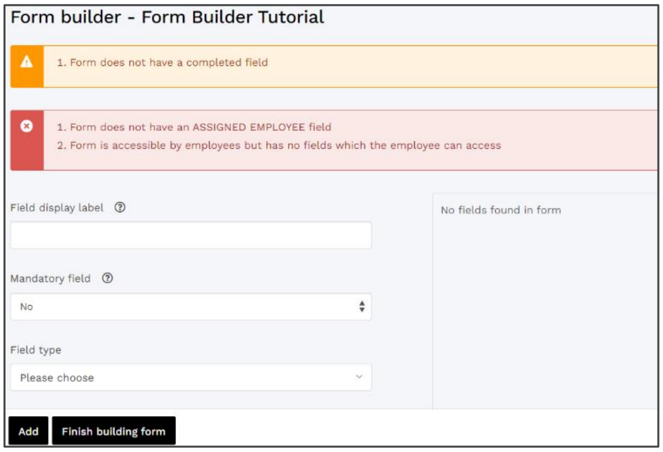


Once you have created the form, you will be taken directly to the form builder page, where you can create the form's fields. You can also access the Form Builder page from the page which lists all forms and clicking on the "Form Builder" action button.

You can also choose to duplicate the fields of another form by selecting the action in the form list page. (For more details on duplicating a form, click here)

On the left, you will find the fields to fill in to create a field in the form. On the right, you will see a simulation of what the form will look like once you click add more forms.

Some warnings appear with the forms to let you know that a specific type of field must be used for the form to work properly, such as a field to assign the form to an employee or a completed field.



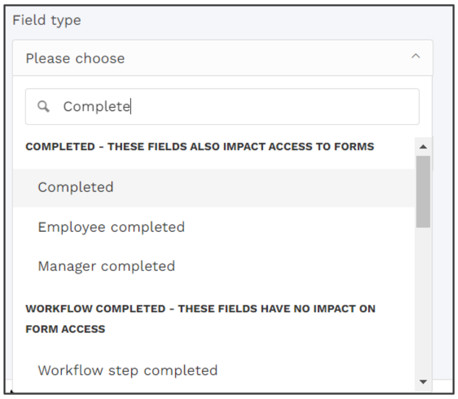
Assigned to Field:
This field should be used on all forms of type "**Other**" or "**Performance Review**" to ensure that the form is correctly associated with the employee to whom it refers. It will populate automatically once the form is associated to the employee through workflow or added manually.

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 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.



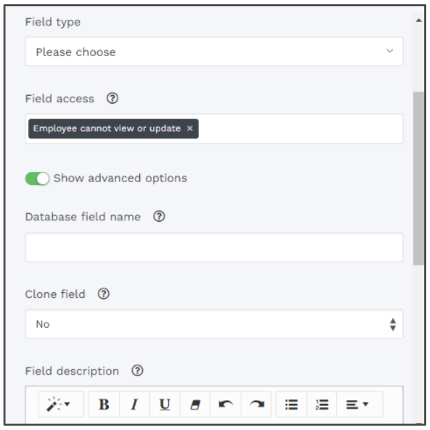
Defined below are each of the fields and field types to help you build a form successfully:

- 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.)

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



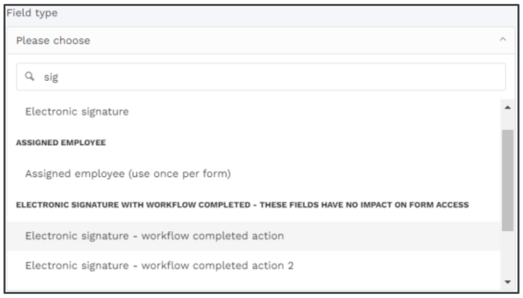
Linking a Form to a Workflow

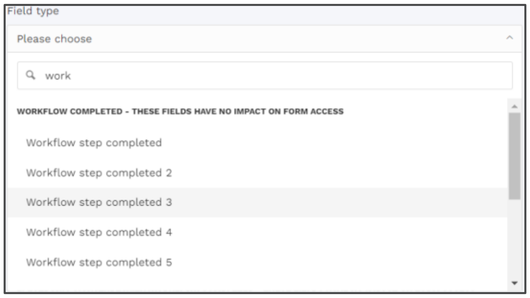
In the previous steps we have seen how to create a form and the different fields with some examples. Now we will move to a brief explanation of the use of a form in relation to the workflow.

An example of a scenario in which this function could be used is for a salary increase:

1. In this workflow's first step, the employee's manager must collect the employee's information, enter it into the form and send it to the HR team:
   a. Name
   b. Current salary
   c. New salary
   d. Current position
   e. New position
2. In the second step, the HR team receives the form, validates the information, and completed their portion of the form. After submitting the form, the workflow will send it to the finance team.
3. In the third step, the finance team receives the form and validates the information. Once the information is validated and the finance team submits the form, the workflow will send a notification to the HR team and the manager to inform them of the status.
4. The fourth step is to send a notification to the employees' manager and the HR team.

In order for a workflow step to move to another while linked to a form, the form must be configured as such; the use of the workflow step completed or electronic signature – workflow completed action field types. (See 2 images below)





With either of these two steps in a form, once completed by the manager, HR team, finance team, il will complete the workflow step trigger the start of the next step. The steps will appear as follows in the form when completed by a user.

For more information on how to create a workflow and its steps, use the following links:

Workflow Guide: https://hrwize.kayako.com/en-us/article/473-workflows-guide
Sending a Form in a Workflow Guide: https://hrwize.kayako.com/en-us/article/276-send-form-in-workflow
Sending a Form to Trigger a Workflow: https://hrwize.kayako.com/en-us/article/415-send-form-to-trigger-workflow