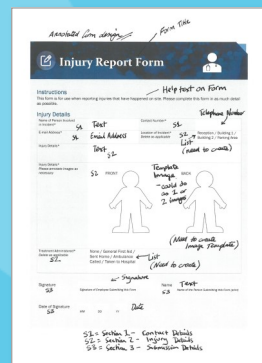


Five-Step Form Creation Guide

1. Design Form

- Sketch out your form design on paper or make a copy of an existing form
- Annotate the form determining: title, subtitles, help text, sections, questions, question types and decide if you want to track any scores using the form
- Consider what questions, template images and lists you already have and, which you will need to create



2. Create Questions

- Go to **Admin | Forms | Questions**
- Select **+ Add**
- Select **Type of Question**
- Enter **Name, Question Text, and Help Text** then select **Active**
- Enter **Type** specific values
- Select **Save**

3. Create Form

- Go to **Admin | Forms | Form**
- Select **+ Add**
- Enter **Title, Subtitle, Help Text, and select Active**
- Select **Data Retention Policy**
- Add **Sections** and drag in questions
- **Save** when complete



Question Types

Whilst Some Question Types are self explanatory, e.g. **Text, Postcode, Email Address, Number, Number (2 places), Date, and Telephone Number.** Others benefit from explanation:

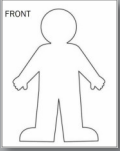
- ➔ **List** - make a choice from a drop down list
- ➔ **Rating** - select number of stars
- ➔ **Signature** - write on screen
- ➔ **Template Image** - annotate over an image on screen
- ➔ **YesNo** - select from two radio button options

4. Check Form

- Go to **Admin | Forms | Form**
- Remember that when you publish a form, it is published. To change a published form you need to create a new version of it. Check it before proceeding!
- Select **Preview** to do so. If you're happy move to **Step 5**, otherwise change

5. Publish Form

- Go to **Admin | Forms | Form**
- Select **Publish**
- Enter an **Effective From** date in the dd/mm/yyyy format
- Select **Publish**. The Published Form History screen is loaded confirming publication details



CREATE A TEMPLATE IMAGE

- » A **Template Image** is a graphic that is annotated over in response to a question. Set up at **Admin | Forms | Template Image**
- » Select **+ Add**
- » Enter a **Name**, and select **Active**
- » Drag image as shown or select **Or Click Here**
- » Select **Save**

Back Save

List

Name* 1-4 Service

Description* Service list (1 poor, 4 excellent)

Active

Pointed

CREATE A LIST

- » A **List** is a series of pre-defined answers to a question. Go to **Admin | Forms | List**
- » Enter a **Name**, and **Description**, then select **Active**
- » Select **+ Add**
- » Enter the **Choice**
- » Repeat last two steps as needed, sort using

Back Save

Template

Name*

Active

Template*

CREATE A DATA RETENTION POLICY

- » Go to **Admin | System | System Settings | Data Retention Policy**
- » Select **+ Add**
- » Enter **Name**, **Retention Months**, and then select **Active**
- » Select **Save**

WHERE CAN I USE MY FORMS?

Forms are simply attached to various actions. When using **Service Delivery's** functionality, they can be selected when setting up **Incidents** or **Service Profiles** for use by those on **Duties** or **Tours** using the **Employee App**

WHAT CAN I DO WITH SCORES?

You can attach **points** to **questions** within **forms**, then add **weightings** to both **questions** and their **section**. These can be used to **score** the overall **form**. If a **pass** mark is assigned to a form, based on result (**pass/fail**), **contacts** and/or **users** can be alerted to take further action

Scoring option in Forms

- Think about which questions you wish to add points to. Only **Rating**, **Yes No**, and **List type** questions can have points allocated to them
- If you are using list questions to **score**, create the lists. When doing this, make sure you have select **Pointed**. Then, add the **Points** to each list choice
- Create your **Rating**, **Yes No**, and **List type** questions. Make sure **Pointed** is selected. Other questions can be used but they will not count towards the score. When filling in the questions associated values, ensure that **Pointed** is selected. For **YesNo** enter **Yes** and **No** points. For ratings values will automatically be created. For **Lists**, make sure **Pointed lists** are used
- Now create/design your form. Make sure to select **Scorable**. Enter a **Pass Mark** as a percentage. Create your sections, adding **weightings**, giving **questions weightings** too. Add your **Questions** to the sections giving them **weightings**.
- Your form is now ready to add to a tour. Ensure that the form is used to calculate a **score**, select **Scorable Form** and select **Passed Form Alerting** and/or **Failed Form Alerting** configure as required