

Forms & Questionnaires

CREATING AND MANAGING FORMS WITHIN YOUR ENVIRONMENT

Introduction

This training guide gives you all the information you need to create and manage your Forms and Questionnaires within the TalentLink system.

This guide goes through the following;

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Throughout the guide, you will see the following icons which indicate the WMJobs Team’s recommendations which will help you with all your [title] queries.



Top tips



Important Information



Best Practice

1. Understanding Forms & Questionnaires

In TalentLink, you are able to create document templates such as questionnaires and feedback forms which capture information/data which is then fed back into the system.

This allows you to standardise the information you receive from managers and candidates, and in some cases, attach scores to candidate answers. When scores are attached, candidates can then be identified in pre-screening or shortlisting by the score and can be used for automation purposes.

In a practical sense, Forms & Questionnaires within TalentLink are used, for example, to make up the different elements of your online application form – if you wanted to create a new application form, you would do this through Forms & Questionnaires. They are also used to create the feedback forms which sit against your Selection Process.

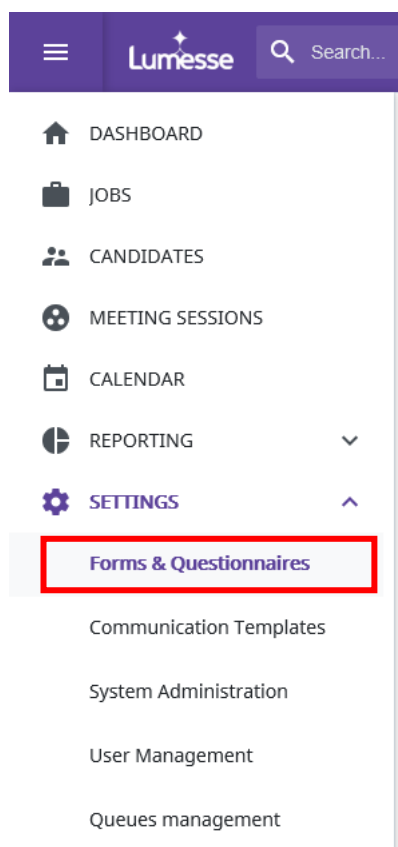
The forms that you create in TalentLink are broken down into '**Form Type**' and each form type relates to where the forms are used and for what purpose.

See below a list of the Form Types available a brief description of each;

Form Type	Description
Diversity Questionnaire	<p>Diversity Questionnaires are used to collect personal details from your candidates relating to equality and diversity information and is usually used as 'Questionnaire #2' of your Application Process.</p> <p>You can build an ad-hoc report which compiles the diversity information of your candidates, which can help you identify trends and highlight any possible inequalities.</p> <p>Because of the sensitivity of information that is being collected from candidates through a Diversity Questionnaire, there is extra security surrounding this type of document.</p> <p>You are unable to search for Diversity Documents within TalentLink and you need a specific role assigned to your user profile in order to view these documents within the system</p>
Profile	<p>Profiles can be used to collect information from candidates, but more specifically, can be used with the 'Matching Candidates' functionality in TalentLink. By using a 'Profile' within your application process, you can specify criteria to match candidates on a job-by-job basis</p>
Questionnaire	<p>Questionnaires are used in the Application Process, more commonly to capture reference information, but can also be used in your Selection Process to send to a candidate via a hyperlink in an email which contains additional information you want a candidate to complete, for example, an offer acceptance</p>
CV	<p>A CV is used in your Application Process to collect a candidate's employment, education and training history as per the WM Jobs set up</p>
Feedback Report	<p>A Feedback Report is usually completed by a manager and are used as part of your Selection Process to capture results of a step, for example, capture shortlisting information or interview feedback</p>
Candidate PIF	<p>A Candidate PIF is the Personal Information Form (PIF) and this is completed by a candidate as part of the Application Process when applying online for a role</p>

2. Creating a new Form/Questionnaire

To navigate to 'Forms & Questionnaires', log-in to Talentlink, and from the left-hand menu, click the arrow next to '**Settings**' and select '**Forms & Questionnaires**';



You will then see the bank of Forms & Questionnaires which sit in your environment;

The screenshot shows the 'FORM TYPES' page in the Lumesse application. At the top, there are filters for 'Forms in organisations' (set to 'All Organisations'), 'Form type' (set to 'Form types'), 'Form master language' (set to 'All'), and 'View' (set to 'Current forms'). There are 'CLEAR' and 'FILTER' buttons. Below the filters is a table with columns: Form name, Description, Comment, Category, and Action. The table lists various forms and questionnaires, including 'Lateral movers application form', 'Priority Movers redeployment application', 'Application Form', 'Confidentiality Clause', 'Candidate Personal Details Form', 'Health Surveillance Questionnaire', 'Internal Application Form', 'Internal/redeployment Application Form', 'Management Accountability', 'New Starter Checklist', 'Notification of Appointment', and 'Part 2 Master WMJobs Safeguarding 2T Form'.

	Form name	Description	Comment	Category	Action
<input type="radio"/>	(do not use) Lateral movers application form	Lateral movers application form		CV	
<input type="radio"/>	(do not use) Priority Movers redeployment application	Form to capture Priority Movers employment history	Application form used on redeployment pool advert	CV	
<input type="radio"/>	(Sep16) Application Form	Part 1 Master WMJobs Safeguarding plus eligibility	(New application form re-design - Sept 2014) Sep16 Implementation	CV	
<input type="radio"/>	(Sep16) Application Form	Part 1 Master WMJobs Standard plus eligibility	(New application form re-design - Sept 2014) Sep16 Implementation	CV	
<input type="radio"/>	(Sep16) Caldicott Code of Practice	Confidentiality Clause	Sep16 Implementation	Questionnaire	
<input type="radio"/>	(Sep16) Candidate Personal Details Form	To ask for Bank Details and NI Number for candidates offered a role	Includes Medical	Diversity Questionnaire	
<input type="radio"/>	(Sep16) Candidate Personal Details Form V2	To ask for Bank Details and NI Number for candidates offered a role	Excludes Medical	Diversity Questionnaire	
<input type="radio"/>	(Sep16) Candidate Personal Details Form V2	To ask for Bank Details and NI Number for candidates offered a role	Excludes Medical	Profile	
<input type="radio"/>	(Sep16) Health Surveillance Questionnaire	To ask for Medical details candidates offered a role	Sep16 Implementation	Questionnaire	
<input type="radio"/>	(Sep16) Internal Application Form	Part 1 Master WMJobs Standard plus eligibility	(New application form re-design - Sept 2014) Sep16 Implementation	CV	
<input type="radio"/>	(Sep16) Internal/redeployment Application Form	Part 1 Master WMJobs Standard plus eligibility	(New application form re-design - Sept 2014) Sep16 Implementation	CV	
<input type="radio"/>	(Sep16) Management Accountability	Management Accountability	Sep16 Implementation	Questionnaire	
<input type="radio"/>	(Sep16) New Starter Checklist	To record the dates of pre employment activities	Implementation 2016	Feedback Report	
<input type="radio"/>	(Sep16) Notification of Appointment	Form completed by the manager following interview	Implementation 2016	Feedback Report	
<input type="radio"/>	(Sep16) Part 2 Master WMJobs Safeguarding 2T Form	WMJobs Safeguarding application (2 Ticks Partners) - Application Form Redesign Sept 14 - WCC	Form includes new reference format, 2 Ticks scheme wording and declarations (Sep16)	Profile	

You are able to filter the forms within your environment by using the filter criteria along the top of the window.

You can filter by **Organisation**, **Form Type** and **View** (this will allow you to filter by current forms or archived form).

To add a new form, scroll to the bottom of the page and click on '**Create New Form**';

CREATE NEW FORM

This will then take you to the '**Form Details**' screen;

FORM DETAILS

Form details

Form category: Diversity Questionnaire

Form name *:

Form description *:

Form comment:

Departments: Associate Opportunities

Form language: English (UK)

Display type: Normal

☐ Answerable many times

CANCEL SAVE AND EDIT

Firstly, you will need to define the '**Form category**' for your new form – this is the *Form Type* outlined on [Page 2](#).

You will then need to enter the '**Form name**' and '**Form description**' for the new form that you are creating, with the option to add a '**Form comment**'.

Under 'Department', you will need to select the Organisation you want the form to sit under in TalentLink.



Depending on your set-up, **you may only have access to one Organisation or you may have access to several** – this will be different based on the user

'**Form language**' will always be defaulted to 'English (UK)'.

'**Display type**' has two options – 'Normal' and 'Next answerable'. Select '**Normal**'.

At the bottom of the screen, you'll see an option '**Answerable many times**'. By selecting this option, you are allowing the user who has access or receives the form, to edit the form once it's been saved.



As best practice, we would suggest that this **option is left unticked**, however can be useful for forms included in your application process – **the choice is yours**

Once you have completed the form details, click '**Save and Edit**'.

Once you save the form, you will then see the **Form Builder view** within TalentLink;

Through Form Builder you can;

- Add, remove and edit questions
- Reorder questions
- Preview the form that you created
- View the form information
- Create custom questions
- Define dependencies for the questions
- Translate the form
- Assign scores to questions

To start building a form from scratch, you can use the options on the left-hand side of the screen which are the questions you can add to the form.

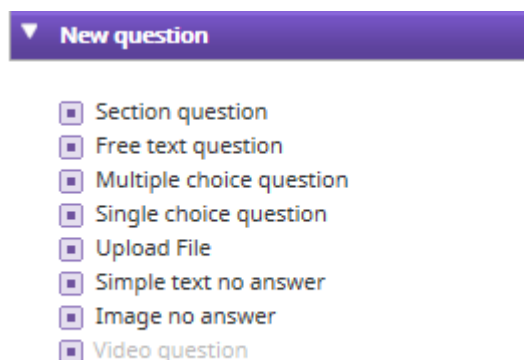
Under '**Question library**', you can add Lumesse standard questions to the forms, or underneath, you can create and custom questions through '**New question**'.



The Lumesse standard questions are commonly used in the forms which make up your **Application Form**, to ensure that candidates applying online are able to transfer information between multiple applications such as Employment History. They have been pre-set by the WMJobs Team. You will find that you will use the 'New Question' function more commonly

3. Creating Custom Questions

Within Form Builder, click the white arrow next to 'New question' and you will see question options you have to add to your new form;



Each question in the list has a different function which you can build into your form. See below a table outlining a description of each question type in the list under 'New question';



Question Type	Description
Section Question	A Section Question is written in a different font colour and is bigger than other questions – this question acts as a container for an explanatory paragraph prior to the set of question that relate to it. You can pin a Section Question to the end of your questionnaire or anywhere else you would not expect to find a question. It can also be used to visually divide questions in the form into various groups
Free Text Question	A Free Text Question is one that is entered into the form and an answer can be typed in response to the question – it allows free text to be typed in
Multiple Choice Question	This option allows you to create a question with a list and a candidate or manager can select more than one option from the list that you define
Single Choice Question	Similar to the Multiple Choice Question, however, a candidate or a manager will only be able to select one option from the list that you define in the question
Upload File	An Upload File question allows you to enter functionality into your form that allows the end user to upload a document which will be fed into TalentLink, for example, if you ask a candidate for a copy of their qualifications, you could use this question on a form as a function to allow them to do this
Simple Text no Answer	This question allows you to enter text into your form as an instruction to a candidate or manager on the form. It doesn't require a response from the end-user
Image no Answer	This question allows you to insert a logo into your form

To add a custom question to your form, hover over the type of question you want to add and **drag and drop** this into the **Form Builder**;

The screenshot shows the Lumesse Form Builder interface. On the left is a sidebar with navigation icons. The main header is purple with the Lumesse logo and a search bar. Below the header, the title 'FORM BUILDER : TEST QUESTIONNAIRE FOR GUIDE' is displayed. A horizontal menu contains tabs: 'Form information', 'Question library', 'New question', 'NORMAL VIEW', 'REORDER VIEW', 'DEPENDENCIES VIEW', 'SCORING VIEW', 'LOCALISATION VIEW', and 'FORM SETTINGS'. The 'New question' dropdown is open, showing a list of question types: Section question, Free text question, Multiple choice question, Single choice question, Upload File, Simple text no answer, Image no answer, and Video question. The 'NORMAL VIEW' tab is active, showing a 'Free text question' option.

Once you drop the question, this will then appear as a section in your form;

This screenshot shows the same Lumesse Form Builder interface, but now a 'Custom Question' has been added to the form. The 'New question' dropdown is still open. The 'CUSTOM QUESTION' tab is active, showing a 'Custom Question' entry with a text input field. The 'Actions' tab is also visible, showing icons for adding, deleting, and editing questions.

You can then edit the text of the question by clicking the  icon, or you can delete the question your form by clicking the  icon, under '**Actions**'.

When you edit the question, you will be given several formatting options;

This screenshot shows the editing options for a 'Custom Question'. The 'CUSTOM QUESTION' tab is active, displaying a text input field with a rich text editor toolbar (bold, italic, underline, font family, font size, link, unlink). Below the input field, it says 'Characters left: 495/510'. To the right of the input field, there are several settings: 'Required' (checkbox), 'Answer inline' (checkbox), 'Question inline' (checkbox), 'Indentation' (dropdown menu set to 'Left'), 'Answer type' (dropdown menu set to 'Free text'), 'Minimum length' (text input), 'Maximum length' (text input), and 'Answer size' (dropdown menu set to 'Tiny x1 Line'). At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

The options available here will depend on the question type you have entered into your form.

The table below outlines the layout options available against what Question Type is relates to. It also gives a brief description of the layout option;

Option	Description	Section	Free Text	Multiple Choice	Single Choice	Simple Text	Image
Has title?	Display the question title	✓					
Required	This will make the question mandatory in your form and will be identified in the form to the end user		✓	✓	✓		
Question inline	This is to do with the formatting – this will display the question on the same line as the previous question	✓	✓	✓	✓	✓	✓
Answer inline	This will display the answer on the same line as the question		✓	✓	✓		
Indentation	This will align the text right, left of centre		✓	✓	✓	✓	✓
Presentation	This option will display the answers as a dropdown list, or single, or multiple columns			✓	✓		

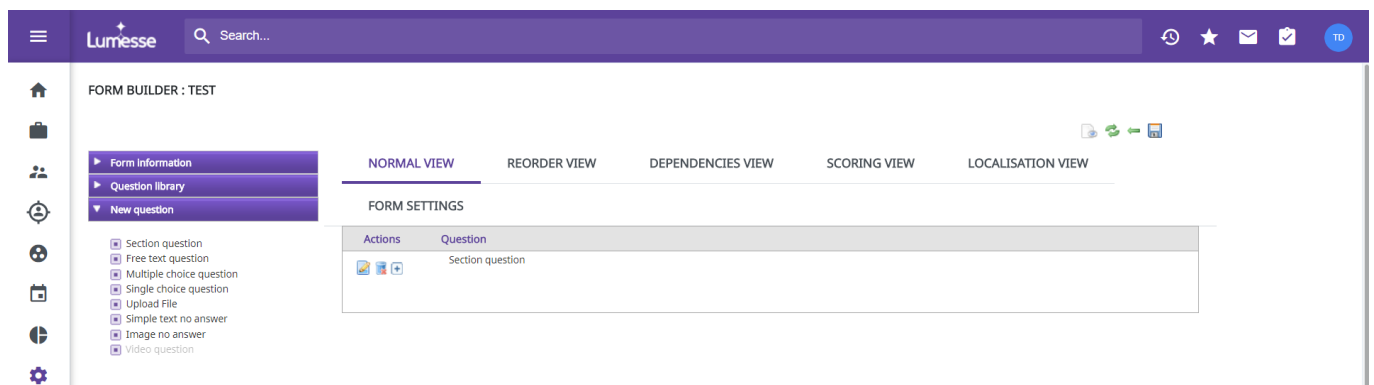
With certain questions, you will also have content properties which are again, dependent on Question Type. Content properties may be defined for free text, multiple choice and image type questions as follows;

Free Text Question	Multiple Choice Question	Image Question
<ul style="list-style-type: none"> • Answer type (number, date, etc.) • Minimum and maximum length (in characters) • Answer size (one to 8 lines) 	<ul style="list-style-type: none"> • Select at least (minimum number of sections) • Select at most (maximum number of selections) 	<ul style="list-style-type: none"> • Image Title • Description • Image Size (width and height)

You now know what different questions there are available and the different formatting available in accordance to question type, see below all questions and an example of adding this type of question into a form within TalentLink;

Section Question

Drag and drop a 'Section Question' into your form;



Under 'Actions' click the  icon to edit the question;

This is a detailed view of the 'Question' edit window. It features a rich text editor at the top with buttons for bold (B), italic (I), underline (U), font family, font size, and text color (A). Below the editor is a text box containing 'Section question' and a character counter showing 'Characters left: 494/510'. To the right, there is a 'Question inline' checkbox and a 'Has title' dropdown menu set to 'Yes'. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Within the text box, you can add a title within your form or explanatory text, by typing it here – you do have a character counter underneath the box to keep track of the characters you're using;

This screenshot shows the same 'Question' edit window as before, but with the text 'Candidate Details' entered into the text box. The character counter at the bottom now shows 'Characters left: 493/510'. The formatting toolbar at the top remains visible.

Once you have entered the text, you can use the formatting options along the top of the window to format the text;

B *I* U Arial 14px **A**

Ix

Candidate Details

Characters left: 493/510



If you want to add a title **AND** explanatory text, bear in mind, the text entered into a Section Question can only be formatted **one way**. So, for example, if you wanted the title in bold and the explanatory text unformatted, you would need to add **two section questions** and format appropriately

Once you are happy with the text you have entered, click the green 'Save' button;

Actions Question

Question Label (In UK)

B *I* U Arial 14px **A**

Ix

Candidate Details

Characters left: 493/510

☐ Question inline
 Has title Yes

CANCEL **SAVE**

You will then see the title of the question, sitting in the overview of the Form Builder;

Lumesse Search...

FORM BUILDER : TEST

Form Information
 Question library
 New question

Section question
 Free text question
 Multiple choice question
 Single choice question
 Upload File
 Simple text no answer
 Image no answer
 Video question

NORMAL VIEW REORDER VIEW DEPENDENCIES VIEW SCORING VIEW LOCALISATION VIEW

FORM SETTINGS

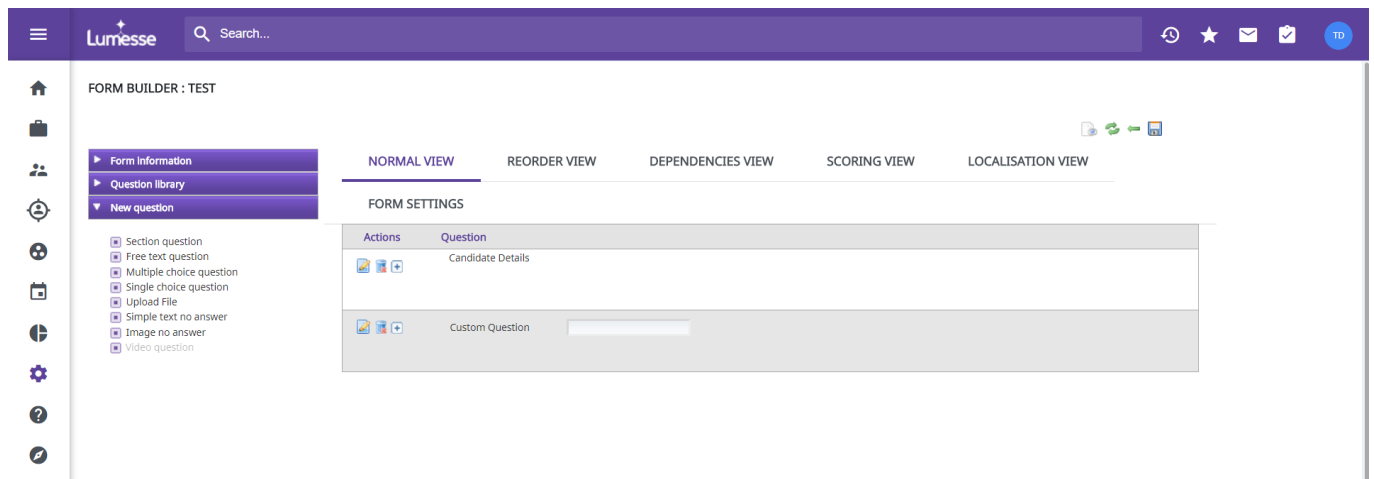
Actions Question
 Candidate Details

As you are building a form or adding new question to an existing form, you can use the preview function to see what the form would look like to an end user.

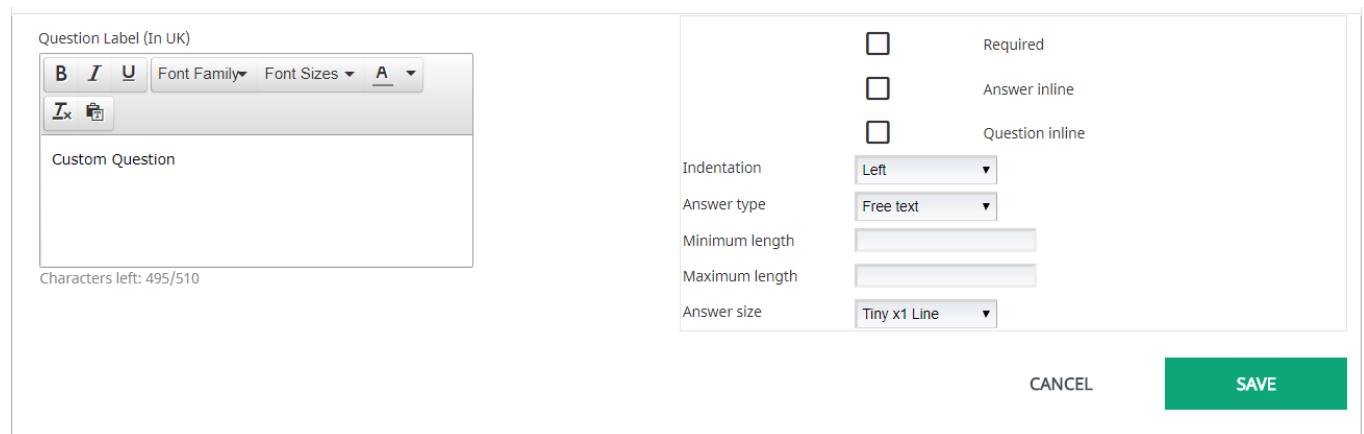
At the top right of the screen, click the icon to preview your form;

Free Text Question

Drag and drop a 'Free Text Question' into your form;



Under 'Actions' click the  icon to edit the question;



Within the text box, you need to enter the **title of the free text field** you want the end user to see on the form when typing into the question;



You can format the text if you wish by using the formatting options along the top of the window.

Using the options to the right, you can specify the formatting if the cell. You can align the answer, specify an amount of characters and the answer type. Refer to [page 9](#) for options.

Once you have created the question, click 'Save'.

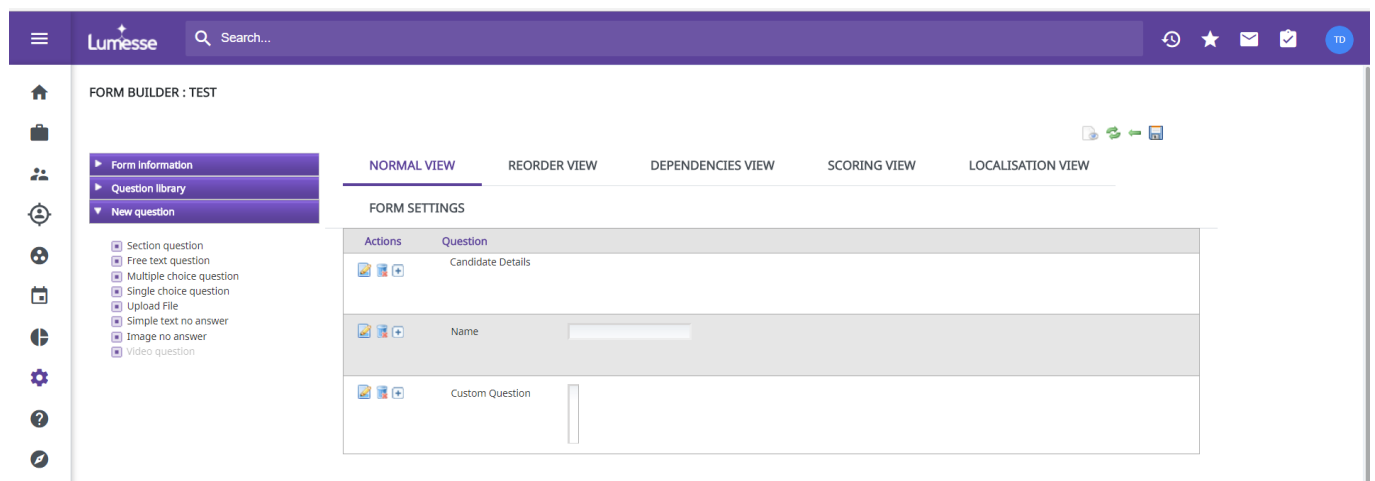
Use the preview function to view the question you have created as outlined [page 12](#).



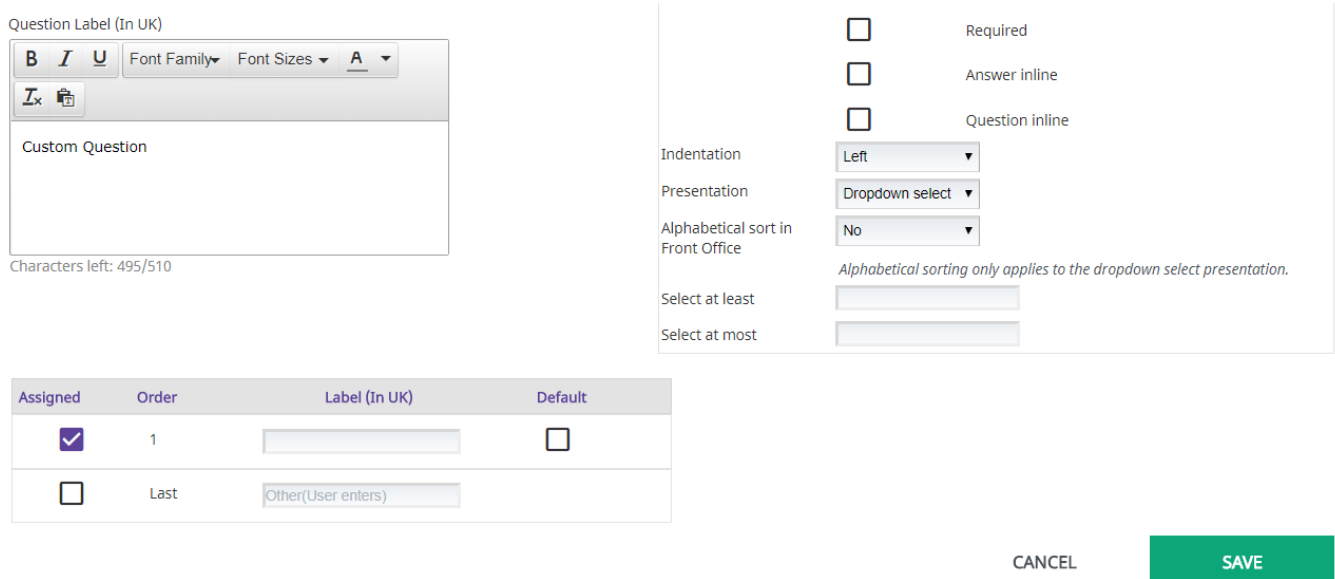
The preview option is particularly good for [previewing the layout of your form](#). If you are formatting your questions by using the 'Answer inline' and 'Question inline' functionality, this is a great way to see what each individual question will look like

Multiple Choice Question

Drag and drop a 'Multiple Choice Question' into your form;

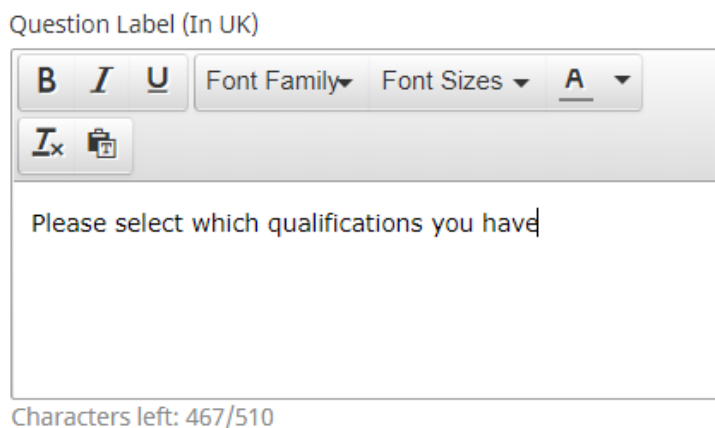


Under '**Actions**' click the  icon to edit the question;



Assigned	Order	Label (In UK)	Default
<input checked="" type="checkbox"/>	1		<input type="checkbox"/>
<input type="checkbox"/>	Last	Other(User enters)	

Firstly, within 'Question Label', type in the name of the question and format as appropriate;



Underneath, you will see a small list – this is where you specify each of the options the end user can see. Start to type your first option into the first field within the list;

Assigned	Order	Label (In UK)	Default
<input checked="" type="checkbox"/>	1	<input type="text" value="GCSE English"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Last	<input type="text" value="Other(User enters)"/>	

As you start to type, you will see that more options appear for you to specify more options.

Under the column '**Assigned**', you will see checkboxes. Here, you can select which ones your end user can see. If you need to edit the options in your list, this is particularly useful to use if an option is no longer relevant in the list on your form.

The options will appear in the order you type them in the list and will correspond to the 'Order' number specified.

The column '**Default**', allows you to define a default option to the end user. This is particularly useful for 'Yes' and 'No' questions or defining a common default answer;

Assigned	Order	Label (In UK)	Default
<input checked="" type="checkbox"/>	1	<input type="text" value="GCSE English"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2	<input type="text" value="GCSE Maths"/>	<input type="checkbox"/>

GENERIC FORM PREVIEW

×

Diversity Questionnaire:

Form id:

Form description:

Form update date:

Form comment:

Form language:

Test (Version1)

38695

Test

12/03/2018

-

English (UK)

[1] Candidate Details

[1] Name

[1] Please select which qualifications you have

[0] GCSE English ☒

[0] GCSE Maths ☐

PRINT

CLOSE

CALCULATE

Within the list, you will see a '**Last**' option. If you are specifying options and you want your end user to be able to specify an 'Other' option in a free text field, select 'Last' and this option will appear to the user as a standard field;

Assigned	Order	Label (In UK)	Default
<input checked="" type="checkbox"/>	1	GCSE English	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	GCSE Maths	<input type="checkbox"/>
<input type="checkbox"/>	3		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Last	Other(User enters)	

GENERIC FORM PREVIEW

×

Diversity Questionnaire:

Form Id:

Form description:

Form update date:

Form comment:

Form language:

Test (Version1)

38695

Test

12/03/2018

-

English (UK)

[1] Candidate Details

[1] Name

[1] Please select which qualifications you have

[0] GCSE English

☐

[0] GCSE Maths

☐

Other:

PRINT

CLOSE

CALCULATE

Once you have specified your multiple-choice options, you can then choose how you want these options to be displayed (*you can use the preview function so see what the different options would look like*);

Presentation

Alphabetical sort in Front Office

Select at least

Checkbox - 1 Col

Dropdown select

Checkbox - 1 Column

Checkbox - 2 Columns

Checkbox - 3 Columns

Parallel boxes

If you have selected '**Dropdown select**', you can choose whether you want the options you have specified to be displayed in alphabetical order;

Alphabetical sort in Front Office

No

No

Yes

With a multiple-choice question, you can set limits for the end user on how many options they can choose as a **minimum** and **maximum**;

Select at least

Select at most

If you want to force your end user to select at least 1 option, specify '1' in 'Select at least' and whatever you choose in 'Select at most'

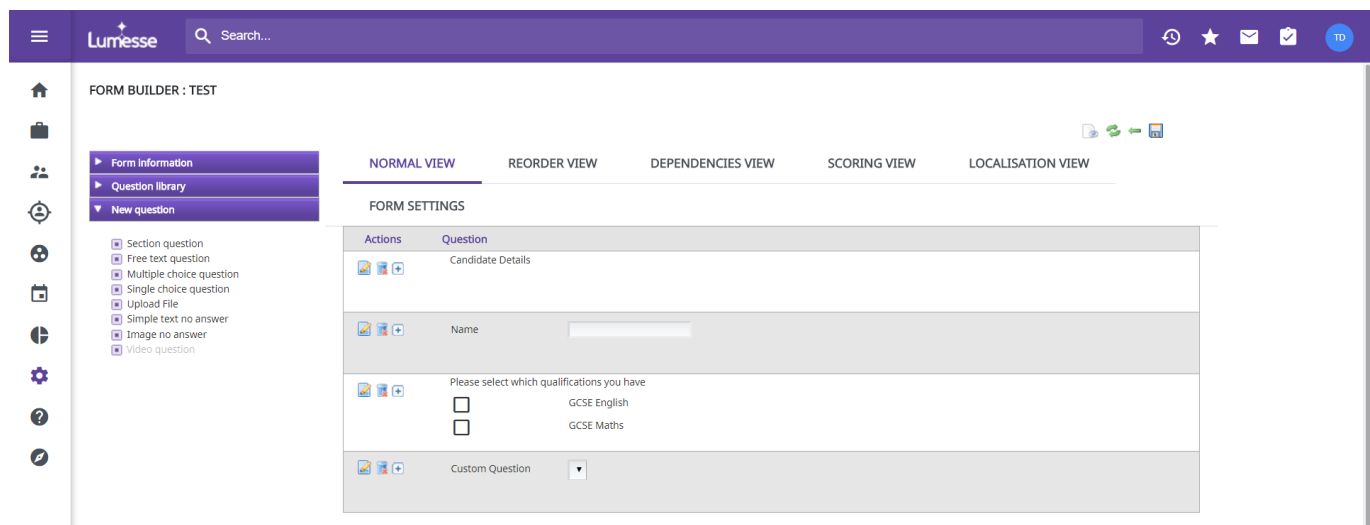


You don't have to specify limits for a multiple-choice question – it's thinking about what you are using the question for and how specific you'd like the answers to be. If you want your end user to be able to select as many options as they'd like, you can leave these fields blank

Once you have specified all fields, click '**Save**'.

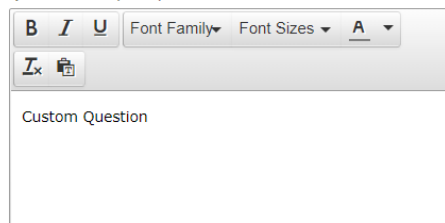
Single Choice Question

Drag and drop a 'Single Choice Question' into your form;

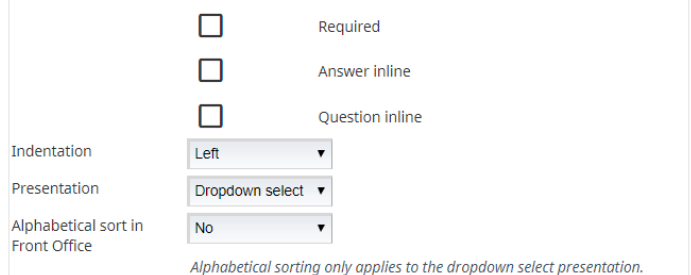


Under 'Actions' click the  icon to edit the question;

Question Label (In UK)



Characters left: 495/510



Assigned	Order	Label (In UK)	Default
<input type="checkbox"/>	0	Please select / No answer	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	1		<input type="radio"/>
<input type="checkbox"/>	Last	Other(User enters)	

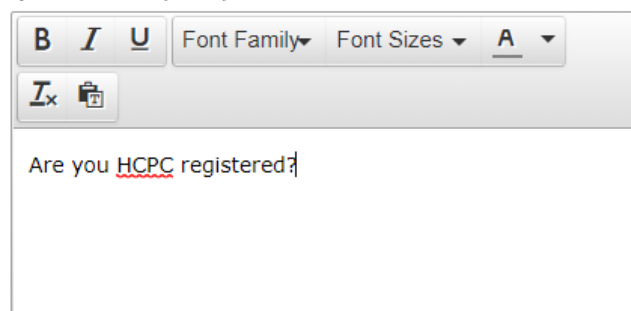
CANCEL

SAVE

A single-choice question is similar to a multiple-choice question in functionality, however, you are forcing your end user to select one option only to this question.

Firstly, within 'Question Label', type in the name of the question and format as appropriate;

Question Label (In UK)



Characters left: 486/510

Underneath, you will see a small list – this is where you specify each of the options the end user can see. Start to type your first option into the first field;

Assigned	Order	Label (In UK)	Default
<input type="checkbox"/>	0	<input type="text" value="Please select / No answer"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	1	<input type="text" value="Yes"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	2	<input type="text"/>	<input type="radio"/>
<input type="checkbox"/>	Last	<input type="text" value="Other(User enters)"/>	

As you start to type, you will see that more options appear for you to specify more options.

Under the column '**Assigned**', you will see checkboxes. Here, you can select which ones your end user can see. If you need to edit the options in your list, this is particularly useful to use if an option is no longer relevant in the list on your form.

The options will appear in the order you type them in the list and will correspond to the 'Order' number specified.

The column '**Default**', allows you to define a default option to the end user. This is particularly useful for 'Yes' and 'No' questions or defining a common default answer;

Assigned	Order	Label (In UK)	Default
<input type="checkbox"/>	0	<input type="text" value="Please select / No answer"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	1	<input type="text" value="Yes"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	2	<input type="text" value="No"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	3	<input type="text"/>	<input type="radio"/>
<input type="checkbox"/>	Last	<input type="text" value="Other(User enters)"/>	

GENERIC FORM PREVIEW

×

Diversity Questionnaire:

Form id:

Form description:

Form update date:

Form comment:

Form language:

Test (Version1)

38695

Test

12/03/2018

-

English (UK)

[1] Candidate Details

[1] Name

[1] Please select which qualifications you have

[0] GCSE English

[0] GCSE Maths

[1] Are you HCPC registered?

[0] No

▼

PRINT

CLOSE

CALCULATE

With a single-choice question, within the list of options, as default field which appears is **‘Please select / No answer’**;

Assigned	Order	Label (in UK)	Default
<input checked="" type="checkbox"/>	0	Please select / No answer	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	1	Yes	<input type="radio"/>
<input checked="" type="checkbox"/>	2	No	<input type="radio"/>
<input checked="" type="checkbox"/>	3		<input type="radio"/>
<input type="checkbox"/>	Last	Other(User enters)	

If you select the **‘Presentation’** as **‘Dropdown select’** and set this option as a default, it will appear to the end user when completing the form;

GENERIC FORM PREVIEW

×

Diversity Questionnaire:

Form id:

Form description:

Form update date:

Form comment:

Form language:

Test (Version1)

38695

Test

12/03/2018

-

English (UK)

[1] Candidate Details

[1] Name

[1] Please select which qualifications you have

[0] GCSE English

[0] GCSE Maths

[1] Are you HCPC registered?

Please select

▼

PRINT

CLOSE

CALCULATE

21 | T: 0121 569 2070 E: helpdesk@wmemployers.org.uk W: www.wmemployers.org.uk

Within the list, you will see a '**Last**' option. If you are specifying options and you want your end user to be able to specify an 'Other' option in a free text field, select 'Last' and this option will appear to the user as a standard field;

Assigned	Order	Label (In UK)	Default
<input checked="" type="checkbox"/>	0	Please select / No answer	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	1	Yes	<input type="radio"/>
<input checked="" type="checkbox"/>	2	No	<input type="radio"/>
<input checked="" type="checkbox"/>	3		<input type="radio"/>
<input checked="" type="checkbox"/>	Last	Other(User enters)	

GENERIC FORM PREVIEW

×

Diversity Questionnaire:
Test (Version1)

Form id:
38695

Form description:
Test

Form update date:
12/03/2018

Form comment:
-

Form language:
English (UK)

[1] Candidate Details

[1] Name

[1] Please select which qualifications you have

[0] GCSE English

☐

[0] GCSE Maths

☐

[1] Are you HCPC registered?

Please select

Other:

PRINT

CLOSE

CALCULATE

Once you have specified your options for your single-choice question, you can then choose how you want these options to be displayed (*you can use the preview function so see what the different options would look like*);

Presentation

Dropdown select

Dropdown select

Radio button - 1 Column

Radio button - 2 Columns

Radio button - 3 Columns

Alphabetical sort in Front Office

If you have selected '**Dropdown select**', you can choose whether you want the options you have specified to be displayed in alphabetical order;

Alphabetical sort in Front Office

No

No

Yes

Once you have created the question, click the green '**Save**' button.

Upload File

Drag and drop an 'Upload File' question into your form;

The screenshot shows the Lumesse Form Builder interface. On the left is a sidebar with icons for home, form, question library, and new question. The main area is titled 'FORM BUILDER : TEST' and has tabs for 'NORMAL VIEW', 'REORDER VIEW', 'DEPENDENCIES VIEW', 'SCORING VIEW', and 'LOCALISATION VIEW'. Under 'FORM SETTINGS', there are two columns: 'Actions' and 'Question'. The 'Actions' column has a pencil icon. The 'Question' column shows a list of questions: 'Candidate Details', 'Name', 'Please select which qualifications you have' (with checkboxes for GCSE English and GCSE Maths), 'Are you HCPC registered?' (with a 'Please select' dropdown), and 'Upload File' (with a 'Choose File' button and 'No file chosen' text).

Under '**Actions**' click the  icon to edit the question;

The screenshot shows the configuration dialog for the 'Upload File' question. It has a 'Document Type' dropdown set to 'CV'. Below it is a warning: 'Warning: question not visible to candidate, if used in Application Process'. There is a 'Choose File' button and 'No file chosen' text. A list of file formats is shown: .bmp, .doc, .gif, .jpeg, .jpg, .odg, .odp, .ods, .odt, .pdf, .png, .rtf, .tif, .tiff, .text, .txt, .xls, .docx, .xlsx, .ppt, .pptx, .sxw, .wpd. The maximum file size is 5120 KB. On the right, there are checkboxes for 'Required', 'Answer inline', and 'Question inline'. Below these is an 'Indentation' dropdown set to 'Left' and a 'Question Title' text field containing 'Upload File'. At the bottom right are 'CANCEL' and 'SAVE' buttons.

Firstly, under '**Document Type**', specify the type of document you would like the end user to upload (normally 'Other' for this type of question) and under 'Question Title', type the question you will to appear to the end user;

This screenshot is a cropped version of the previous one, focusing on the configuration dialog. The 'Question Title' field, which contains the text 'Please upload a copy of you', is highlighted with a green border.

GENERIC FORM PREVIEW

Diversity Questionnaire:
Form id:
Form description:
Form update date:
Form comment:
Form language:

Test (Version1)
38695
Test
12/03/2018
-
English (UK)

[1] Candidate Details

[1] Name

[1] Please select which qualifications you have

[0] GCSE English ☐

[0] GCSE Maths ☐

[1] Are you HCPC registered?

Please select ▼

[1] Please upload a copy of your certificate

Choose File No file chosen (Warning: only usable by candidate)

PRINT

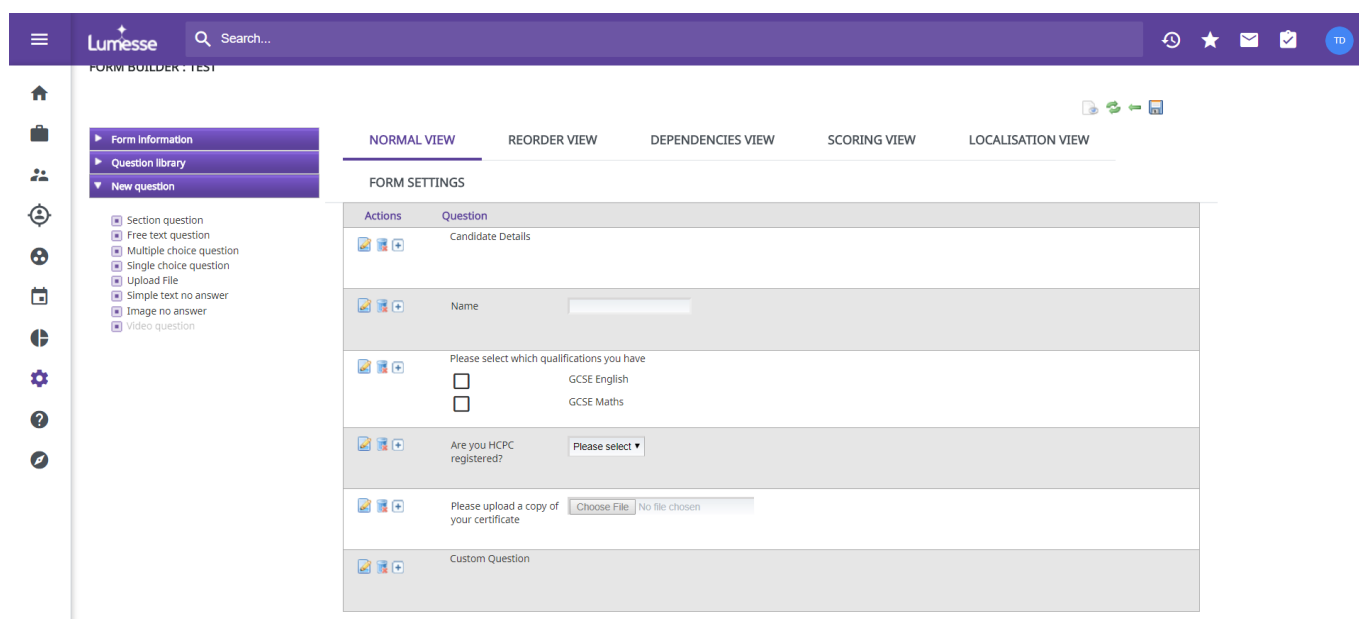
CLOSE

CALCULATE

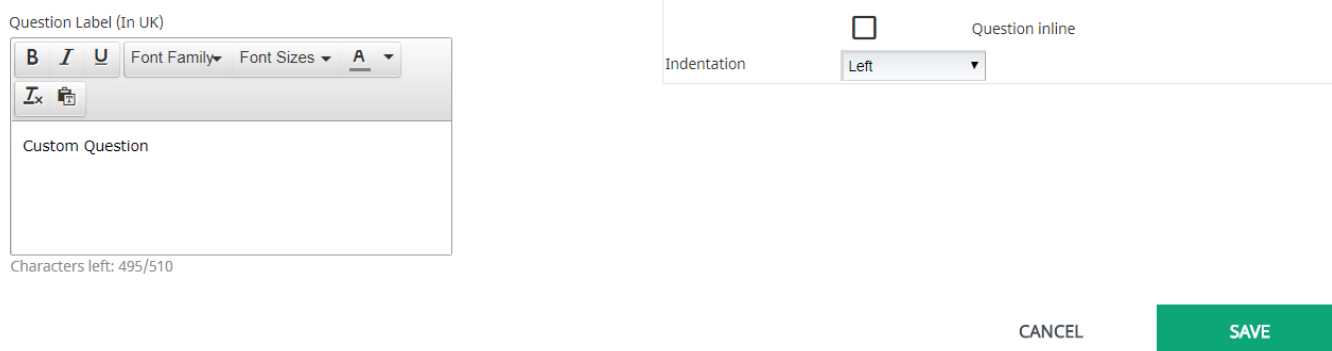
Once you have completed the question, click **‘Save’**.

Simple text no answer

Drag and drop a 'Simple text no answer' question into your form;

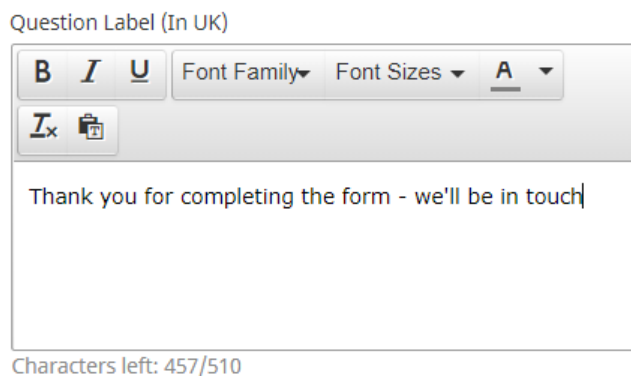


Under 'Actions' click the  icon to edit the question;



This is a question to give instruction to the end user completing the form and is different to a section question as these are more prominent.

Type in the text you would like displayed;



Choose whether you would like this inline with the last question by ticking 'Question inline' and click 'Save' once you have finished creating this question.

Image no answer

Drag and drop an 'Image no answer' question into your form;

Under 'Actions' click the  icon to edit the question;

To add an image on your choice, click 'Choose File' and browse your local drive for the image you'd like to upload to the form.

You can then edit the properties of the image, and if need be, you can change the dimensions of the image you've uploaded by entering new figures into 'Width' and 'Height';

Once uploaded and the properties have been defined, click '**Save**'.

Once you save, you will see the image with Form Builder;

☰

Lumesse

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👥

👤

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📅

🕒

⚙️

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📊

- Single choice question
- Upload File
- Simple text no answer
- Image no answer
- Video question

📷 📄 +

Name

📷 📄 +

Please select which qualifications you have

☐ GCSE English
☐ GCSE Maths

📷 📄 +

Are you HCPC registered?

Please select ▼

📷 📄 +

Please upload a copy of your certificate

Choose File


No file chosen

📷 📄 +

Thank you for completing the form - we'll be in touch

📷 📄 +

Custom Question



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4. Re-ordering Questions

Once you have created all the questions that need to sit in your form, it doesn't matter what order you've created them in as you have the ability to **re-order questions**.

You can do this one of two ways – firstly, within '**Normal View**' where it lists all your questions and a preview of content, you can simply drag and drop questions into a different order;

The screenshot shows the Lumesse Form Builder interface in 'Normal View'. The left sidebar contains a 'New question' dropdown menu with options: Section question, Free text question, Multiple choice question, Single choice question, Upload File, Simple text no answer, Image no answer, and Video question. The main area displays 'FORM SETTINGS' with tabs for NORMAL VIEW, REORDER VIEW, DEPENDENCIES VIEW, SCORING VIEW, and LOCALISATION VIEW. The 'NORMAL VIEW' tab is active, showing a list of questions with columns for 'Actions' and 'Question'. The questions listed are 'Name' and 'Candidate Details'. Below the list, there is a preview of the form content: 'Please select which qualifications you have'.

This screenshot is identical to the one above, showing the Lumesse Form Builder interface in 'Normal View'. The 'NORMAL VIEW' tab is active, displaying the 'FORM SETTINGS' section with a list of questions: 'Name' and 'Candidate Details'. The preview below shows 'Please select which qualifications you have'.

Secondly, you can click on the '**Reorder View**' tab and this will show you the questions in number order;

The screenshot shows the Lumesse Form Builder interface in 'Reorder View'. The 'REORDER VIEW' tab is highlighted with a red box. The main area displays a list of questions in numbered order: 1 Name, 2 Candidate Details, 3 Please select which qualifications you have, 4 Are you HCPC registered?, 5 Please upload a copy of your certificate, 6 Thank you for completing the form - we'll be in touch, and 7 Custom Question. The left sidebar and top navigation bar are the same as in the previous screenshots.

Here, you can drag and drop the questions into the correct order, the same as you would do in '**Normal View**'.

5. Creating Dependencies

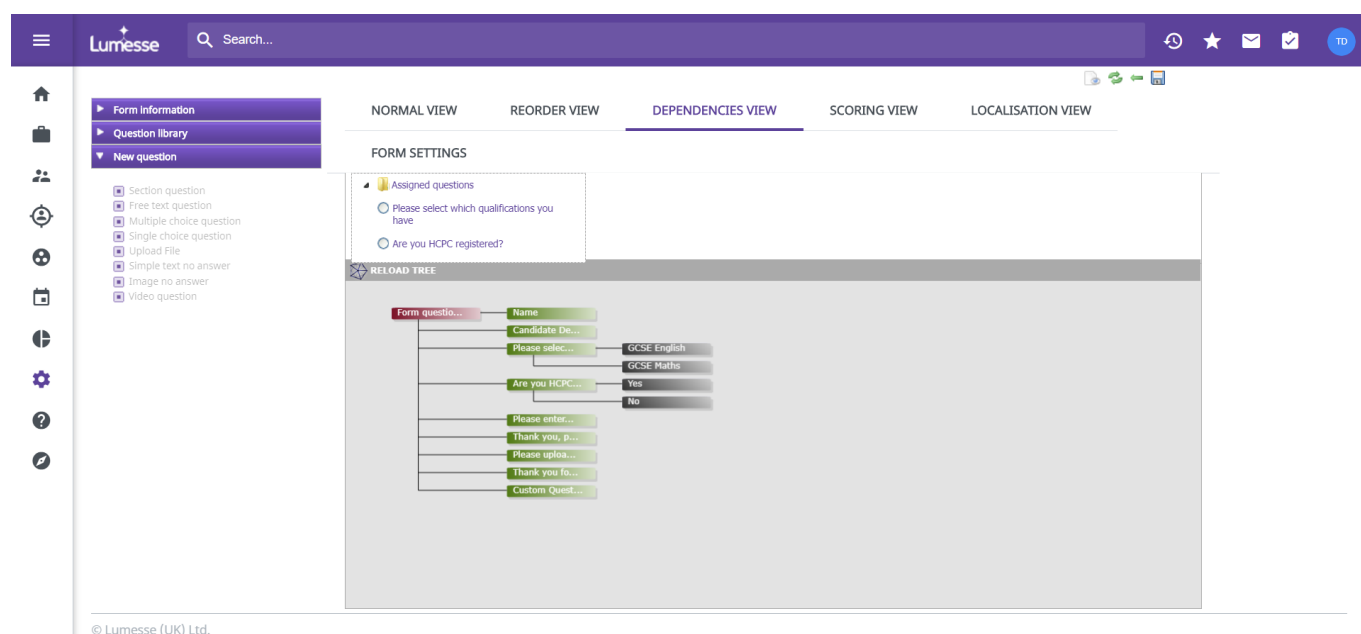
Within the Form Builder, you can enter '**Dependencies View**' which enables you to create dependencies between questions.

By defining a dependency, you can enable/disable selected additional questions based on the answers provided by the end user of the form. Before you create dependencies, it's important to plan how you want the question to look and ensure you have created all the relevant questions in your form to correspond with your dependency-based questions. Dependencies can only be set for **Single** and **Multiple-Choice questions** and you will only find these questions available in the 'Assigned Questions' section with 'Dependencies View'.

To create dependencies, within the form you have created on an existing form, click '**Dependencies View**';



This will show you '**Assigned Questions**' – which are the questions available for you to set dependencies against and the Dependencies Workspace, showing the tree of linked questions;



The tree helps you to visually see the which options have been linked to which questions, which is useful if you are setting multiple dependencies.

As and when you work through them, you can '**Reload Tree**' to update this view by clicking the  icon.

To create a dependency, firstly, under '**Assigned Questions**', check the question you wish to set dependencies against. This will then bring forward the '**Options**' available in this question.

FORM SETTINGS



In the example I've shown here, I want to set a dependency against the questions 'Are you HCPC registered?'.

If the end user selects '**Yes**', I want them to provide their HCPC number.

If the end user selects '**No**', I want a message to appear to ask them to continue with the form – at this point, I have created the initial master question along with a Free Text Question for the end user to enter their HCPC number, and a Simple Text No Answer Question for the 'thank you' statement.

To set an answer against 'Yes', click this under '**Options**' – this will then bring forward all '**Available questions**' within the form that's been created;

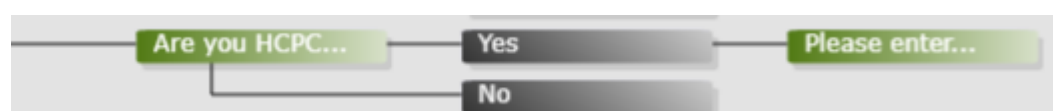
FORM SETTINGS

Assigned questions <ul style="list-style-type: none"><input type="radio"/> Please select which qualifications you have<input checked="" type="radio"/> Are you HCPC registered?	Options <ul style="list-style-type: none"><input checked="" type="radio"/> Yes<input type="radio"/> No	Available questions <ul style="list-style-type: none"><input type="checkbox"/> Name<input type="checkbox"/> Candidate Details<input type="checkbox"/> Please select which qualifications you have<input type="checkbox"/> Please enter your HCPC number<input type="checkbox"/> Thank you, please continue<input type="checkbox"/> Please upload a copy of your certificate<input type="checkbox"/> Thank you for completing the form - we'll be in touch<input type="checkbox"/> Custom Question
---	--	---

Against 'Yes', in 'Available Questions', 'Please enter your HCPC number' has been selected. Once your options have been selected, save the form in the top right of the window – if you move away from the screen, this will save your changes;



Once saved, if you reload the tree, you can now see the question linked to the 'Yes' option;



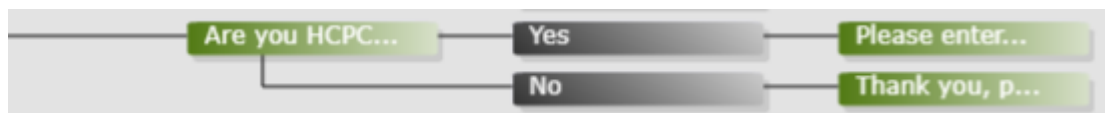
Next, in this example, 'No' has been selected under 'Options', and this has refreshed the available options;


FORM SETTINGS

Assigned questions <ul style="list-style-type: none"><input type="radio"/> Please select which qualifications you have<input checked="" type="radio"/> Are you HCPC registered?	Options <ul style="list-style-type: none"><input type="radio"/> Yes<input checked="" type="radio"/> No	Available questions <ul style="list-style-type: none"><input type="checkbox"/> Name<input type="checkbox"/> Candidate Details<input type="checkbox"/> Please select which qualifications you have<input type="checkbox"/> Please enter your HCPC number<input type="checkbox"/> Thank you, please continue<input type="checkbox"/> Please upload a copy of your certificate<input type="checkbox"/> Thank you for completing the form - we'll be in touch<input type="checkbox"/> Custom Question
---	--	---

Against 'No', 'Thank you, please continue' has been selected and the form has been saved.

The tree has been reloaded and can now see an option appearing next to 'No';



Now that the dependencies have been set, I can preview them by selecting the  icon.

If I navigate to this question, I can see how the dependencies will work. If I select 'Yes';

[1] Are you HCPC registered?

Please select ▼

Please select

[0] Yes

[0] No

[1] Please upload a copy of your c

The form provides me with the dependency I created;

[1] Are you HCPC registered?

[0] Yes ▼

[1] Please enter your HCPC number

If I select 'No';

[1] Are you HCPC registered?

[0] No ▼

[1] Thank you, please continue

The available question I selected appears.



You can have other available questions linked to your master question, it depends how you want the form to be set up. **It's best to plan your dependencies** so you have a clear picture in mind of what you want to achieve

6. Defining scores for questions

Within the Form Builder, you can enter '**Scoring View**' which lets you use the scoring results to;

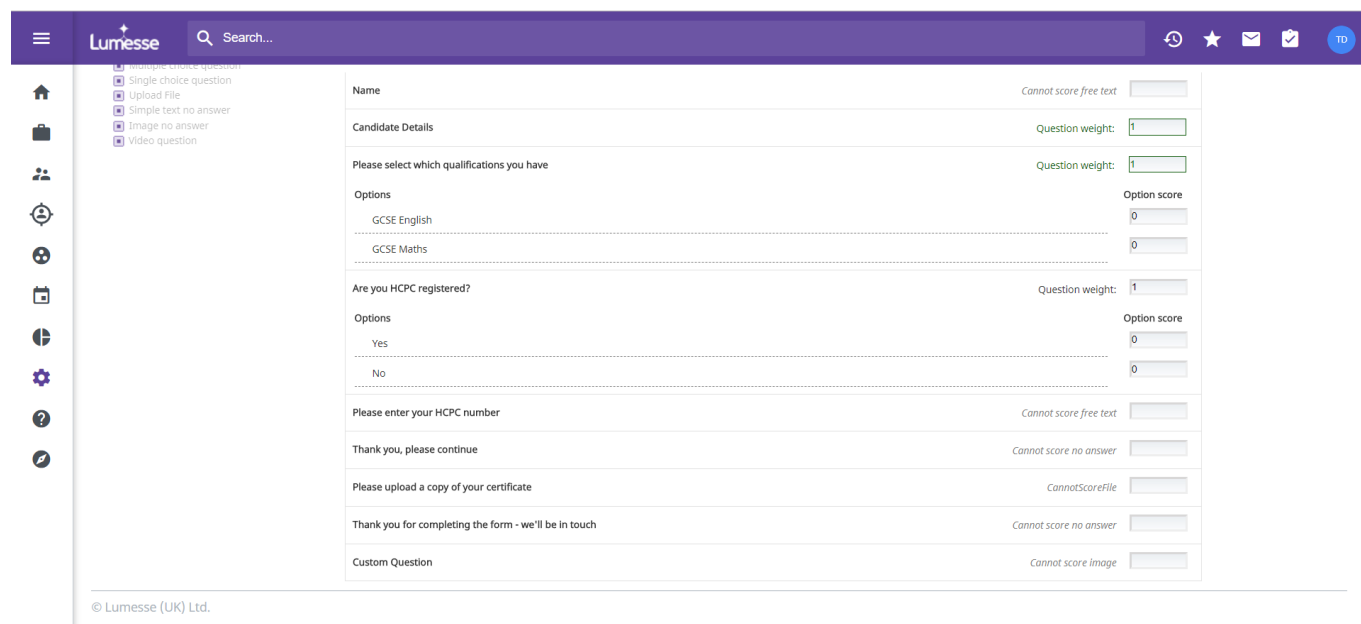
- Rank candidates by the scores they achieve
- Automatically move candidates through the Selection Process
- Automatically reject candidates
- And more commonly in our set up, **use a score to easily identify how a question has been answered by looking at the Selection/Hiring tab on a vacancy.**

The questions which can be scored against are single of multiple-choice questions.

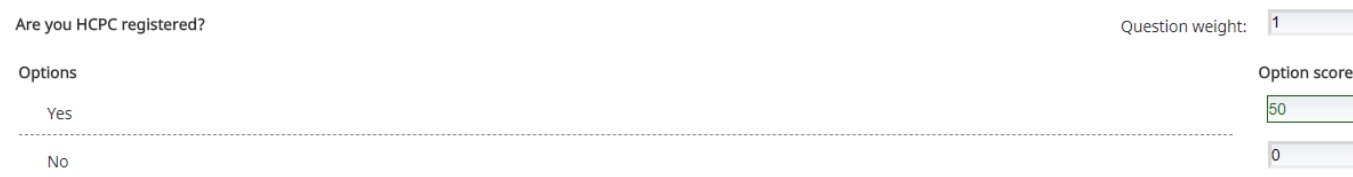
To set a score, click on the '**Scoring View**' tab within your form;



You can then see all the questions within your form and the questions you are able to score;



To add a score, simply enter this into the field under '**Option score**';



You can also weight questions to identify them as more important, however, this is something that is not commonly used in our set-up.

Once you have entered scores, save the form by clicking the  icon at the top right-hand of the screen.

Now, because I have set a score on this question, I can use this if I am creating an automated Selection Process (see our [Selection Process Training Guide](#) for more details). Also, if I ask candidates to complete this form as part of the application process, when they apply, if they have a score of '50', I know they have answered a particular way to this question.

7. Localisation View


Localisation View enables you to translate the questions and options available on the form into any languages available for our Company.

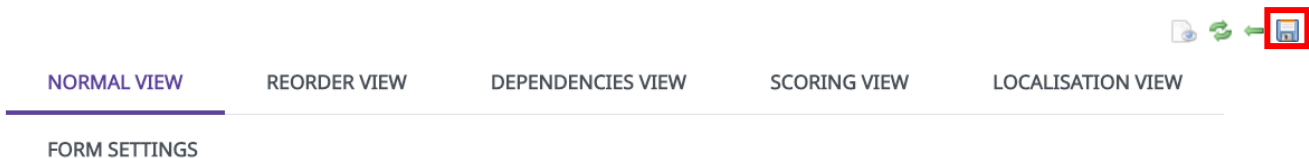
It's not something that is widely used with our set-up at WMJobs, however the option is available so only one form is created available in different languages.

8. Saving a Form – making a form ‘Active’

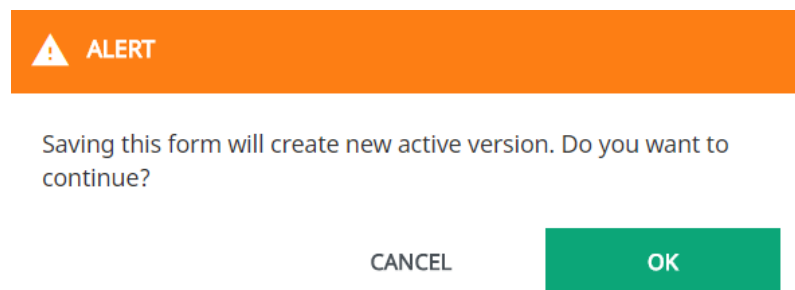
When you create a new form within Forms & Questionnaires, it's important to **save the form** within **‘Normal View’** as saving the form **makes it active within TalentLink**. When we say ‘active’, it means that you are able to select the form when creating a Selection Process, or when linking a form to a Communication Template.

It's also important to save a new active version of your form if you make changes so that these appear straight away, and it updates the form if it's linked to a specific Selection Process step.

To save a newly created form or save changes you've made, click the  icon whilst is **‘Normal View’**;




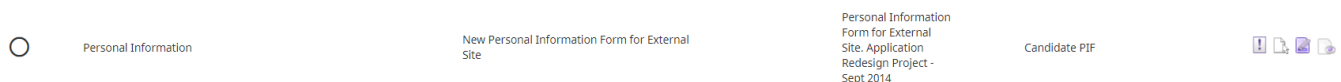
When you click ‘Save’, the following message will appear;



You want to make the form ‘active’, so click **‘Ok’**.

By clicking ‘Ok’, you will be taken back to the bank of Forms & Questionnaires which sit in your environment.

From this view, you can tell which forms haven't been activated as they will have an  icon next to them in the far end column, ‘Actions’;

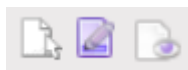



9. Updating a form

To make changes to a form which has been created, navigate to the form through '**Settings**' in the left-hand menu and select '**Forms & Questionnaires**'.


Use the filter along the top of the screen to find the form you wish to change – ensure you have the correct **organisation**, **form type** and ensure you in the correct **view**.

When you find your form, under '**Actions**' you can click one of three icons;



By clicking the  icon, you can edit the form details including the **name**, **description**, **form type** and which **organisation** this form primarily sits under.

By clicking the  icon, this takes you straight into **form builder** where you can **edit**, **delete** or **add new** questions to the form.

You can preview the form from this view by clicking the  icon.

Ensure when you make changes you save your form as outlined on [page 34](#).

10. Copying a form

Rather than create every form from scratch, you have the functionality within TalentLink to **copy forms**.

To copy a form, navigate to your Form Bank and check the form you wish to copy;



At the bottom of the screen, you will see the following dropdown options;

Move selected form to:	<div>Please select ▼</div>
Copy selected form to:	<div>Please select ▼</div>

From the dropdown list next to 'Copy selected form to', select the name of the organisation you want to copy the form to.



By selecting the organisation from the drop-down list, **this is the system's prompt to copy the form** – you are not asked to confirm whether you want to copy the form, this will automatically be done by choosing an option from the list – be mindful before copying your forms

This will then copy the form to the organisation you choose from the dropdown list.

11. Moving a form

You can move the forms you create within TalentLink between your different organisations.

To move a form, navigate to your Form Bank and check the form you wish to move;



At the bottom of the screen, you will see the following dropdown options;

Move selected form to:	<div>Please select ▼</div>
Copy selected form to:	<div>Please select ▼</div>

From the dropdown list next to 'Move selected form to', select the name of the organisation you want to move the form to.



By selecting the organisation from the drop-down list, **this is the system's prompt to move the form** – you are not asked to confirm whether you want to move the form, this will automatically be done by choosing an option from the list – be mindful before moving your forms

12. Archiving a form

You are able to manage the forms you no longer use by **archiving** them under Form Management.

To archive a form, firstly, access 'Forms & Questionnaires' from the left-hand menu 'System Administration'.

Filter your templates to which 'Organisation' the original template sits in and what 'Form Type' the template is ([see page 4](#)).

From your list, select which template you wish to archive;



Once selected, at the bottom of the screen, click the '**Archive**' button;

ARCHIVE FORM



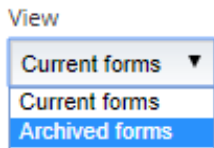
By clicking on the archive button, **this is the system's prompt to move the form to archived** – you are not asked to confirm whether you want to archive the form, this will automatically be done by clicking the button– be mindful before archiving your forms

13. Restoring a form

If you have archived a form previously, TalentLink allows you to restore the form so it can actively be used again and will sit under 'Current forms' rather than 'Archived forms'.

To restore a form, firstly, access 'Forms & Questionnaires' from the left-hand menu 'System Administration'.

Along the top of the screen, firstly, filter all the forms to 'Archived forms'



This will then show you the list of forms which sit in your archive. Check the form you wish to restore;



At the bottom of the screen, click the 'Restore' button;



By clicking on the restore button, **this is the system's prompt to move the form back to 'Current Forms'** – you are not asked to confirm whether you want to restore the form, this will automatically be done by clicking the button– be mindful before archiving your forms

This form will now be sitting under 'Current Forms'.

14. Troubleshooting/FAQ's

I can't find a form I've just created

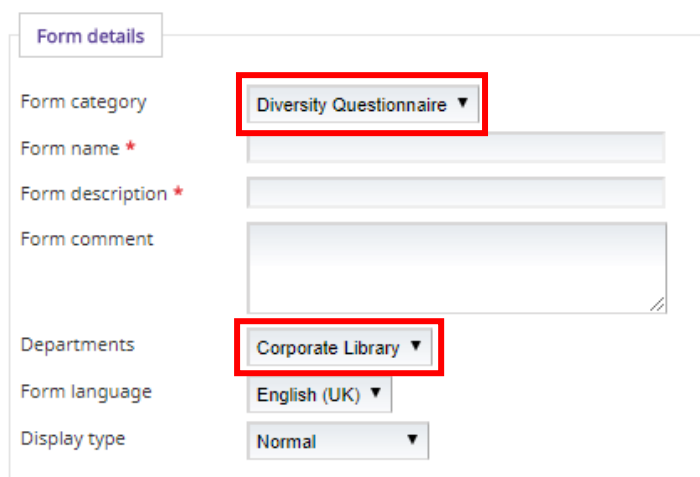
When creating a form within TalentLink, using the filters along the top of the screen, you need to select which **organisation** you want the form to sit under and what **form type** at the point of creation;



Forms in organisations: All Organisations ▼

Form type: Form types ▼

When you create the new form, under 'Form Details', these can be changed;



Form details

Form category: Diversity Questionnaire ▼

Form name *

Form description *

Form comment

Departments: Corporate Library ▼

Form language: English (UK) ▼


Display type: Normal ▼

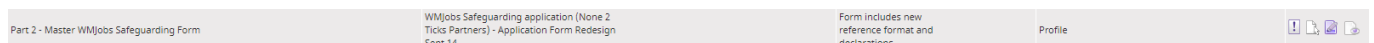
If these were not changed or specified at point of creation, it's more than likely that your form is sitting under the organisation 'Corporate Library'.

To find the form, if you filter 'Forms in organisations' to 'All organisations' and 'Form type' as 'Form types', this will show you all the forms available in your environment, without being organisation specific, therefore, you should be able to find the form.

As outlined above, you can change this by editing the form. See [page 35](#).

I can't find a form I'm trying to attach to a selection/application process

More than likely, you have created the form, however you haven't **activated the form**. If you navigate to Forms & Questionnaires, next to your created form – if this isn't active, you will see an  icon;



Part 2 - Master WMJobs Safeguarding Form	WMJobs Safeguarding application (None 2 Ticks Partners) - Application Form Redesign Sept 14	Form includes new reference format and declarations	Profile	
--	---	---	---------	---

To active the form, follow the steps on [page 34](#).

My dependencies aren't working correctly

Before building your dependencies on a form, it's always recommended that you map out which dependencies are based on which questions, to avoid any confusion.

It's important that when creating dependencies that you **save as you go along** ([page 30](#)) and **preview the form** ([page 31](#)) where possible to see how your dependencies are working. It's always good to preview your **dependencies tree** as well to see where the dependency may be failing – it is a case of trial and error in this case, to try and identify and correct the issue.

One thing to bear in mind is the order of the questions sitting within your form – if you change the order of the questions within your form, you may find that a dependency question may appear in the wrong place if that question is sitting in the form **before** or **after** the parent question.

Using the example form created within this guide, a dependency was created based on the question 'Are you HCPC registered'. If answered 'Yes', the end user would be prompted to enter their HCPC registration number – if they answered 'No', they would receive a message to say 'Thank you, please continue';

5	Are you HCPC registered?
6	Please enter your HCPC number
7	Thank you, please continue

The above is taken to 'Reorder view' within the Form Builder.

If I move this question, for example, to the bottom of the form;

5	Are you HCPC registered?
6	Please enter your HCPC number
7	Please upload a copy of your certificate
8	Thank you for completing the form - we'll be in touch
9	Thank you, please continue

When I preview the form, and answer 'No' to 'Are you HCPC registered', you can see that the 'Thank you, please continue' statement, now appears at the bottom of the form rather than underneath the initial question;

[1] Are you HCPC registered?

[0] No ▼

[1] Please upload a copy of your certificate

Choose File No file chosen

(Warning: only usable by candidate)

[1] Thank you for completing the form - we'll be in touch

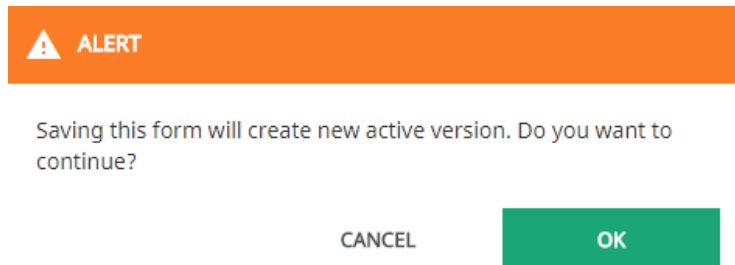
[1] Thank you, please continue

You need to ensure that your questions are sitting within your form in the correct order, especially when linked to dependencies so that they appear correctly in the preview.

I want to make changes to a form in use

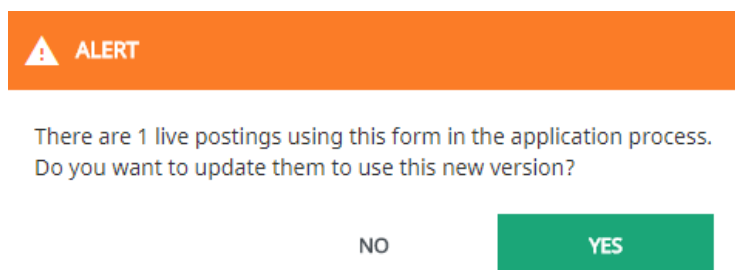
You are able to make changes to forms in use – if you update a form which is attached to an active **selection process**, the changes will automatically update (therefore, you won't have to upload new versions of the form in your selection process).

When you make changes to an active form, the system will ask you if you want to create a new active version – by clicking 'Ok', the form will be updated in the system;



An orange alert bar with a white triangle icon and the word 'ALERT' in white. Below it, the text reads: 'Saving this form will create new active version. Do you want to continue?'. At the bottom, there are two buttons: 'CANCEL' and 'OK'.

You can also make changes to forms which are attached to your **application process**. If you edit a form which is active in an application process, the system will prompt you how many vacancies there are with this particular form in the application process and will ask you if you want to update them to the new version;



An orange alert bar with a white triangle icon and the word 'ALERT' in white. Below it, the text reads: 'There are 1 live postings using this form in the application process. Do you want to update them to use this new version?'. At the bottom, there are two buttons: 'NO' and 'YES'.

If you click 'Yes', note that the change that you have made will appear to **new candidates who click apply**. If a candidate is part way through an application form and has saved and resumed, they will submit an old version of the form, rather than the new.

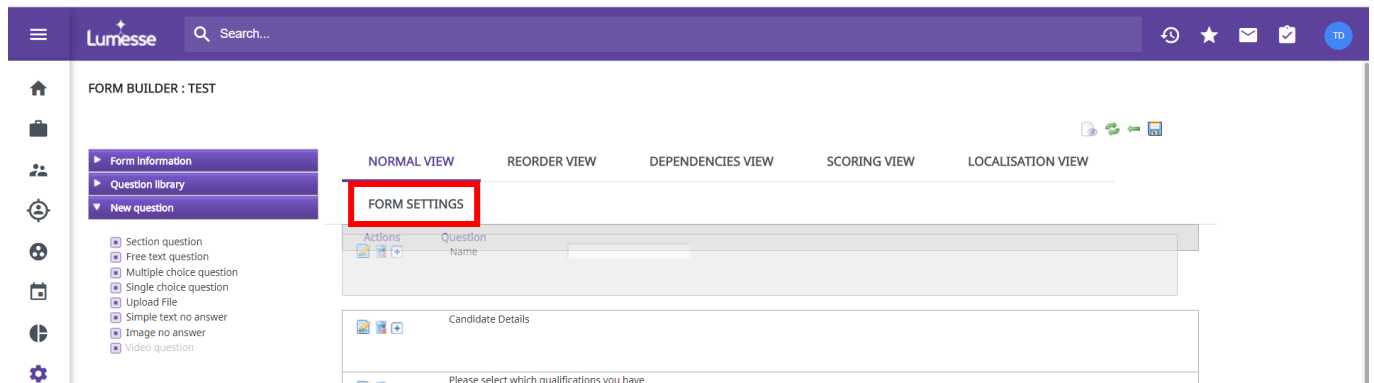
What happens if I archive a form that is a part of a live selection/application process?

If a form is linked to a selection or application process which you then archive, this should have no affect on your live processes – candidates will still be able to apply for a role and you'll still be able to move candidates through a process.

If at some point you wanted to edit the form, include this in a selection process elsewhere on the system, because the form has been archived, if you are actively searching for this in 'current forms', then you would be unable to select this.


I've created a form as the wrong form type – what do I do?

This can easily be changed – you would do this one of two ways - through '**Form Settings**' within the Form Builder;

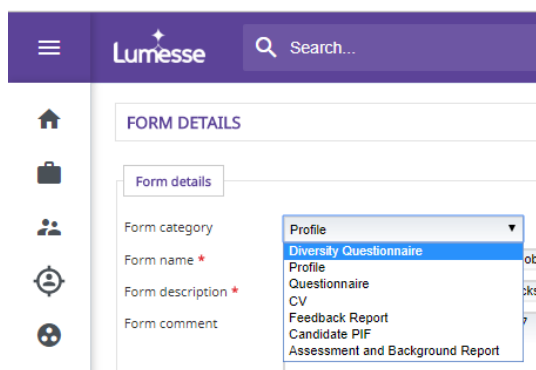


You can also change the form type within your form bank view – next to each form, under ‘**Action**’ you will see 3-4 icons;



Click on the  icon to view the form details;

Under ‘Form category’, you can change this;



Click ‘Save’ once you’re done.

You can now create and manage Forms & Questionnaires!

We have outlined in this guide the essential information you need to create and manage within your TalentLink environment.

For more information on Configuration, please visit the Service Centre at <http://wmemployers.freshdesk.com/helpdesk>



Forms & Questionnaires is a short module featured in our **Open House Configuration Training**. If you or any colleagues are interested in attending an open house training session, please contact the team who will be able to provide you with further information.