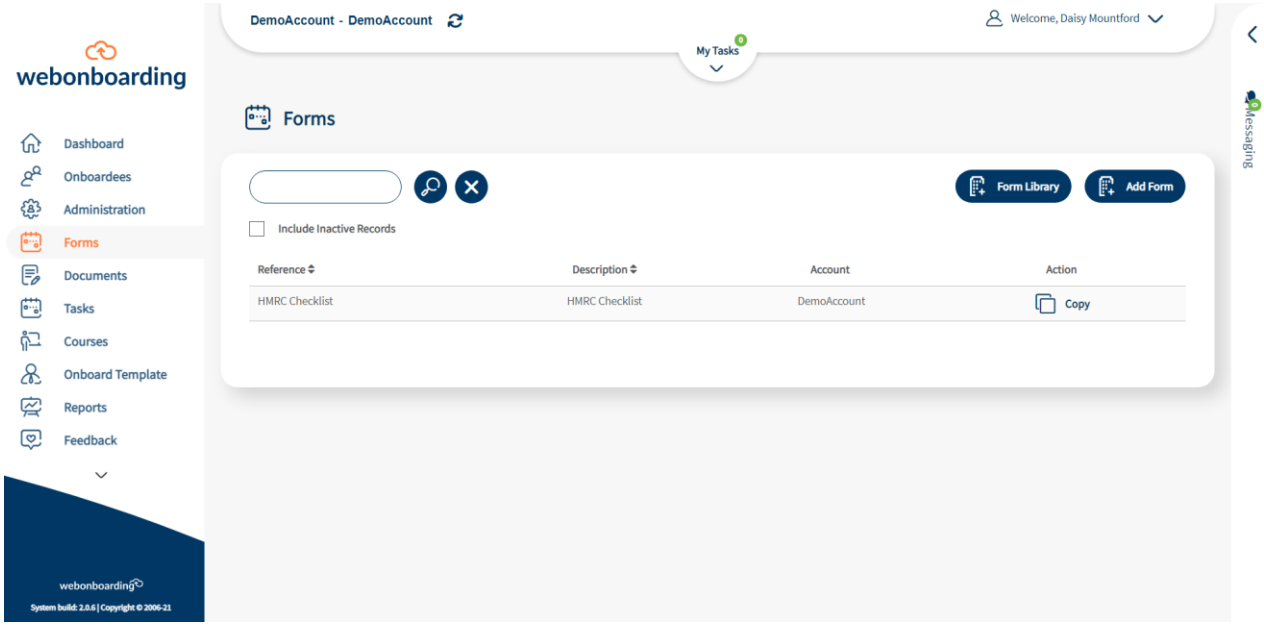
Forms

Forms is a section of the system designed to replace cumbersome paper forms and gather required information from onboardees. You can use Forms in Webonboarding to replicate current paper forms in a format that can merge across existing information and allow onboardees to complete the Form on their mobile device.

Webonboarding Forms are much more effective than using PDF or Word files in the Documents section as you can define how an onboardee needs to answer and they are designed to be responsive to mobile browsers. This reduces input errors and makes things simpler for onboardees.

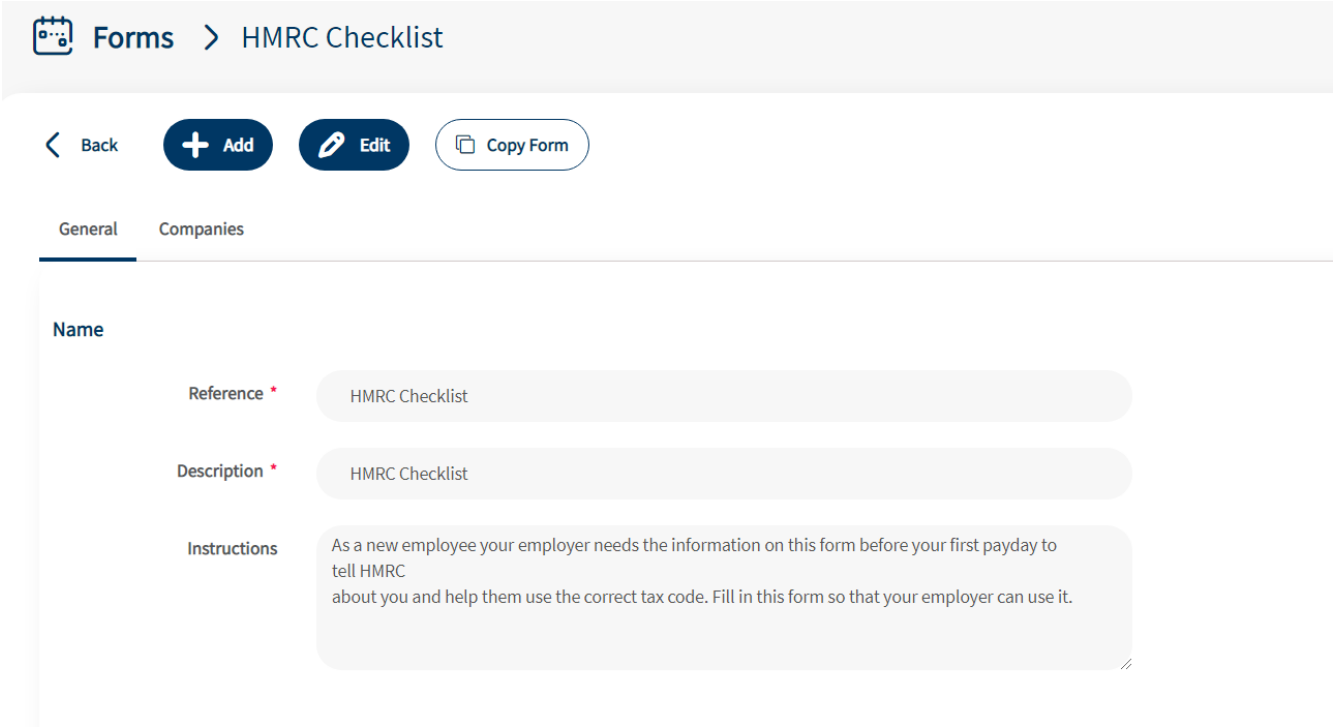
Creating a form

From the Dashboard or Left-hand side menu, navigate to forms.



Click, “add form” on the right-hand side.

Start in the General tab



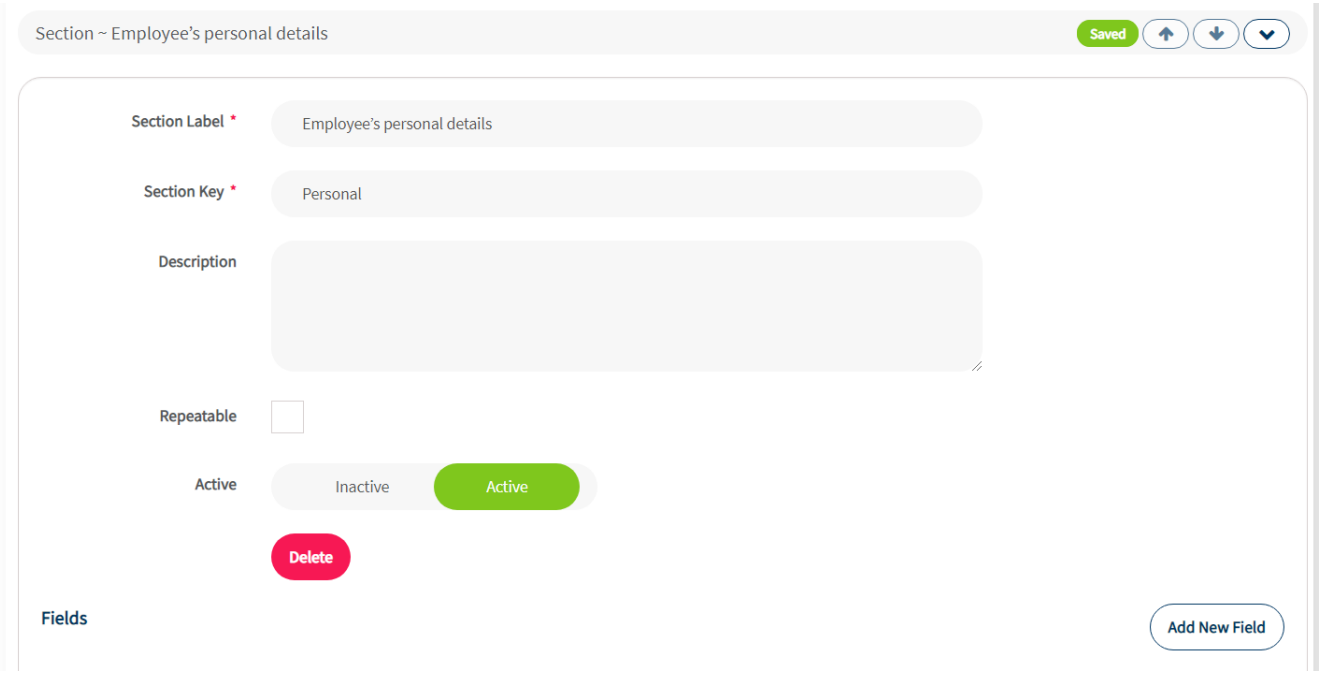
Heading	Description
Reference	A unique reference for this form – use version numbers to help control and track changes
Description	A short description of the form
Instructions	Here you can add a fuller description of what you expect the onboardee to do and why you are asking them to complete the form. This gets displayed to the onboardee and is visible on every section of the form.

Adding Questions

You can then start to build the questions within your form. Every form must have at least one section and one field. Sections are a great way to separate different types of information you are asking for. Some examples might be the sections of a tax form separating personal details from statements you need the onboardee to make, or splitting something like employment history from a declaration.

To start you must click “add new section” at the bottom right hand side.

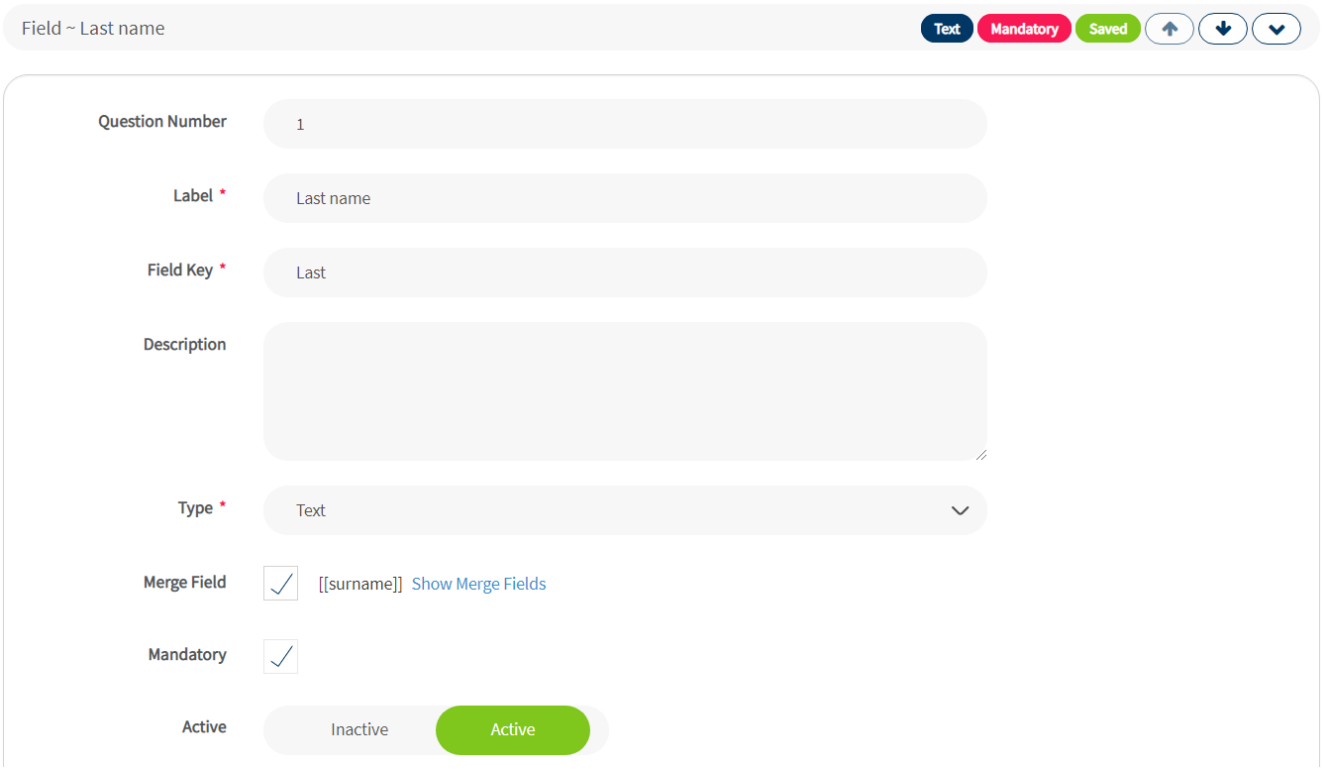
Once you have clicked add new section you will be able to start to fill out the section details.



Heading	Description
Section Label	A unique label for the section to communicate to the onboardee what this section is for. These appear as tabs in the Forms section for Onboardees
Section Key	A unique reference for this section. This is used when exporting the form data and forms part of the field label in the export.
Description	Here you can add a description of what this section is for. This gets displayed to the onboardee and is visible on this section of the form.
Repeatable	Select this box if you want all the fields in this section to be able to be repeated a number of times. When selected you are able to define the maximum number of responses. This is useful for things like employment history.

You are also able to Delete sections providing they have not yet been saved by an onboardee in their process.

You can then add fields (questions) to the section you have created. Click “Add New Field” at the bottom right hand side.



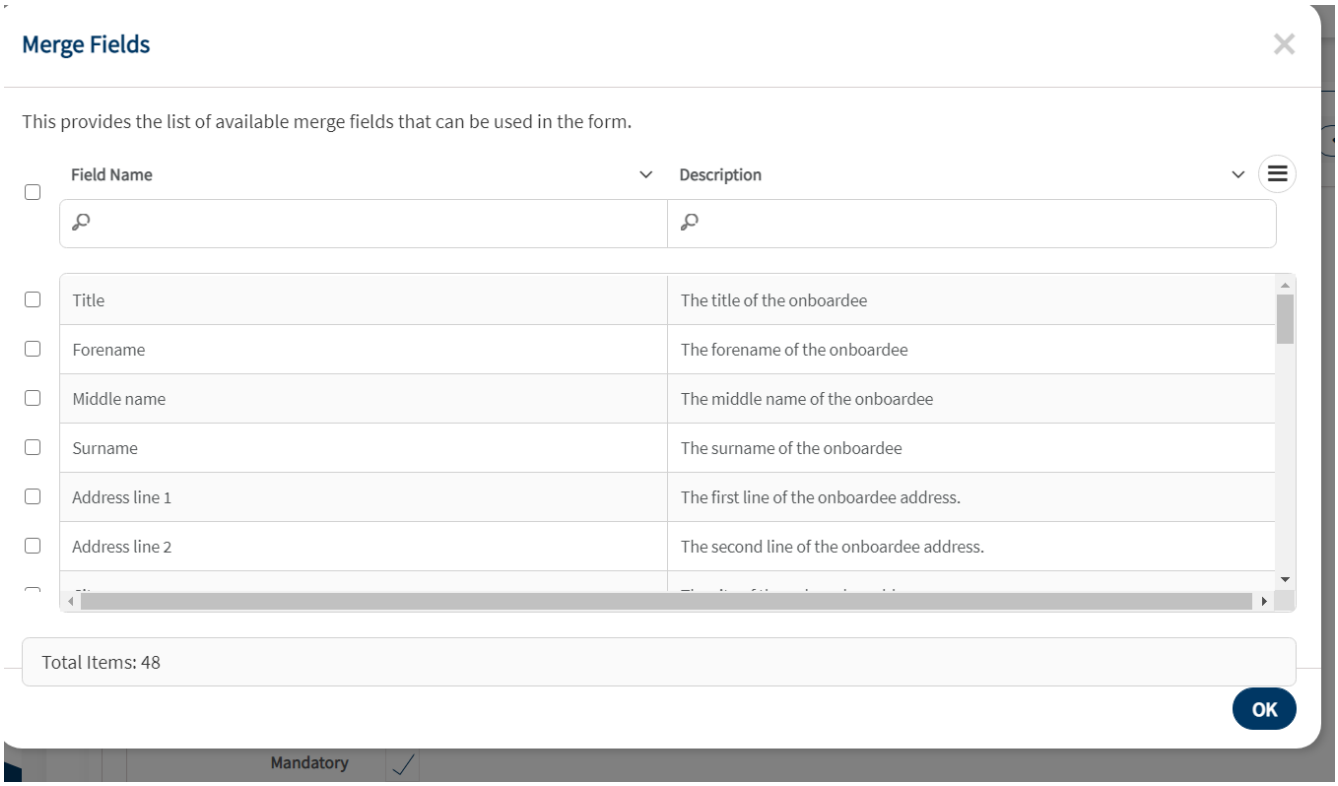
Heading	Description
Question Number	A number to display against the question field (optional)
Label	A label for the field to communicate to the onboardee what this field is for. Use for the questions you want to ask the onboardee.
Field Key	A unique reference for this section. This is used when exporting the form data and forms part of the label in the export alongside the section key.
Description	Here you can add a description of what this field is for. This gets displayed to the onboardee above the area for the response. This is particularly useful for questions that have long descriptions about them or the answers.
Type	This defines the type of response that the onboardee will need to give. (See field type table below)
Merge Field	Certain types allow you to merge information from other areas of the system, use 'Show Merge Fields' to search for merge fields to include for that type of response.
Mandatory	If selected the Onboardee must respond to this field in order to complete the Form fully.
Active	Makes a field Active or Inactive in an existing Form.

There are a 7 types of responses to fields in a form on Webonboarding. Please see details below:

Type	Description
Text	A free text box allowing numbers, letters and symbols. (Merge fields available)
Numeric	A free text box only allowing numbers. (Merge fields available)
Date	Allows a date to be entered or selected in a calendar format. (Merge fields available)
Radio button	Will allow you to create a multiple choice list with buttons to select a single response. Defaults to Yes and No as answers but you can add more response.
Drop down	Allows you to create your own dropdown menu with your own responses for the onboardee to select from.
Text area	Creates a large free text box for the onboardee to complete a more detailed response.
Boolean	Adds a check box for an onboardee to confirm wether something is true or false, for example. Useful for declarations and signature substitutes.

As mentioned above we have included the option to add merge fields as responses for Form fields. This eliminates the pain point of an onboardee having to repeat information that Webonboarding has already collected, for example first name and surname.

When you click the ‘Select merge field’ link on an appropriate field the below will display:

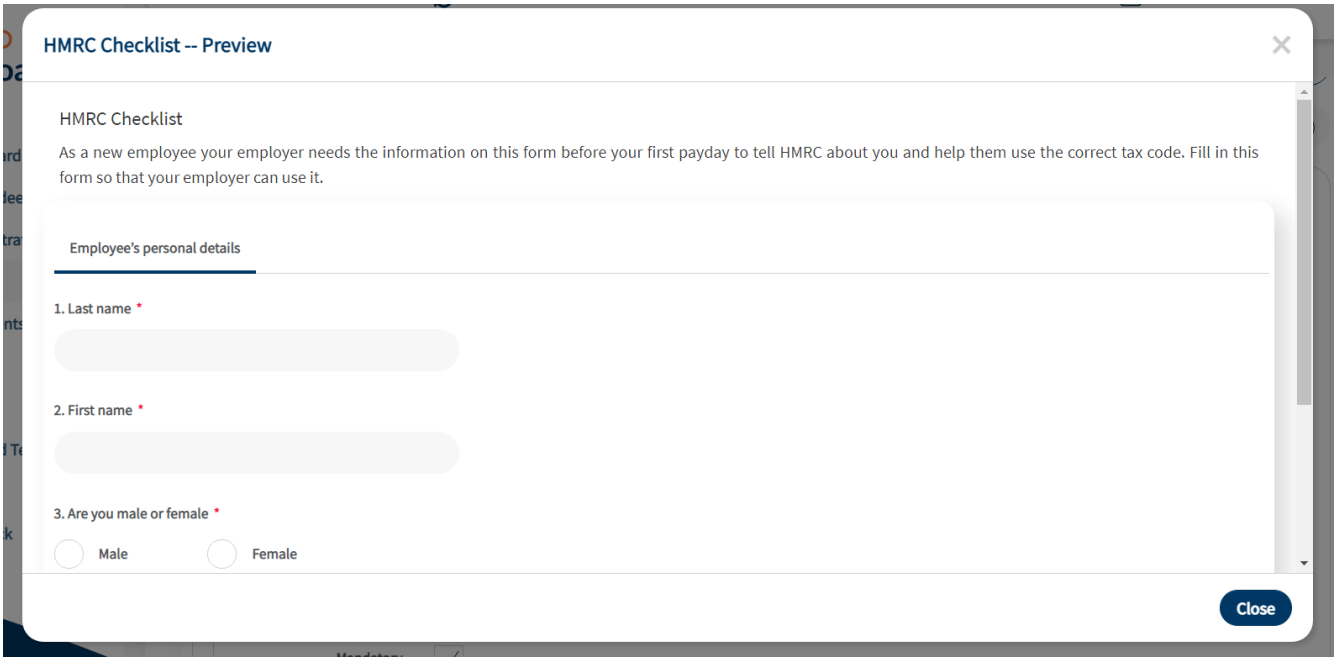


Simply search by the field name or description to find the required merge information, tick the check box to the left of the item and select ‘OK’ to add it to a field.

Previewing the Form

When creating a Form you can preview it at any time using the preview button on the right hand side.

When you click this you will be able to see the sections and fields included in the Form as an example of how it will appear to onboardees. Please note that merge fields will not be populated in the preview section and you will not be able to preview what it looks like on a mobile device.



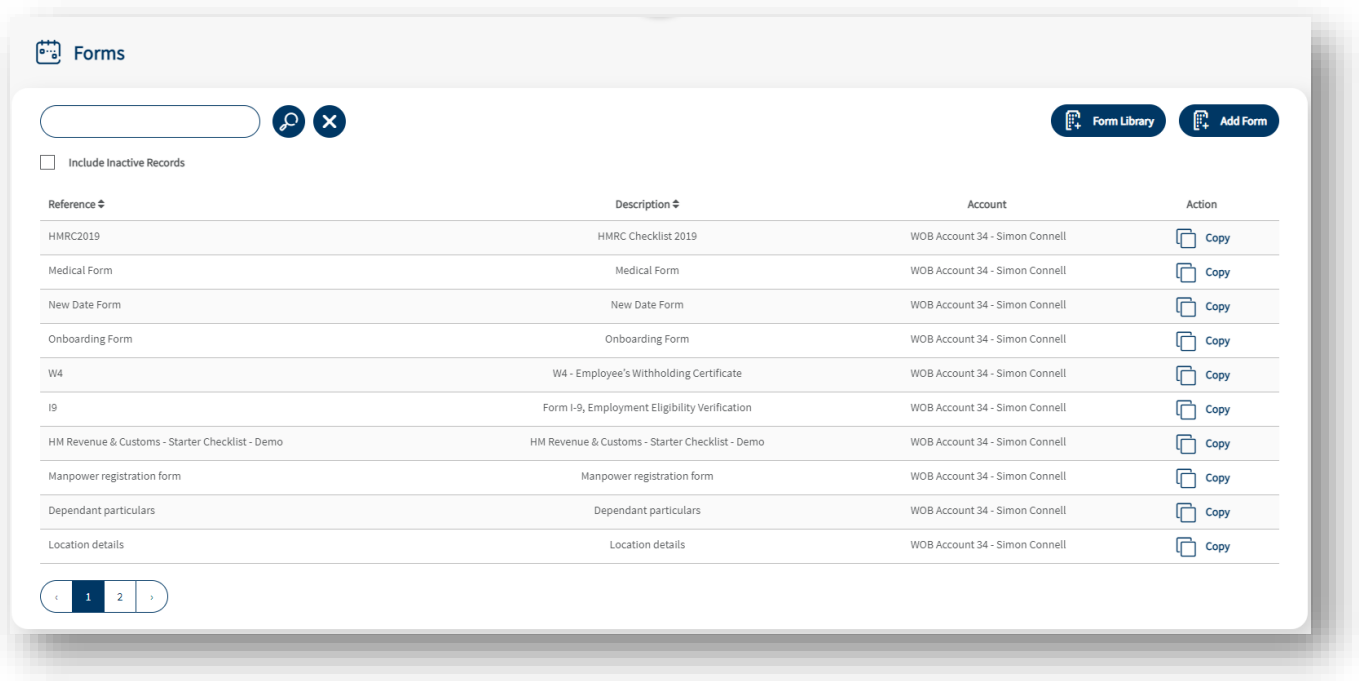
Once you have created your form you will need to select the companies that can have access to this form from the Companies tab, as you would with documents.

Editing a Form

You can edit an existing Form up to the point that an onboardee saves information in it. We suggest you check Forms carefully for how they appear visually and errors when creating it. You can do this by adding it to a test onboardee's profile and logging in as them but make sure not to save the Form when leaving that section.

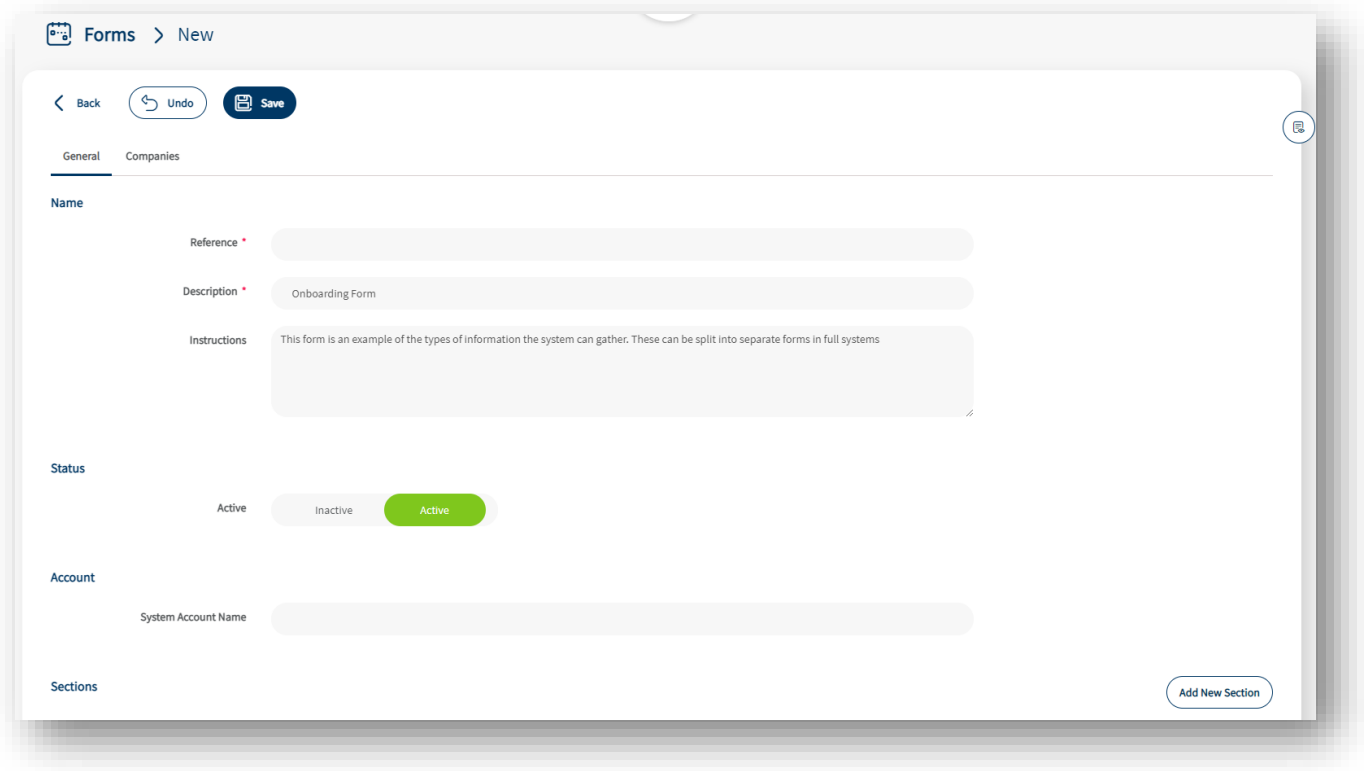
Once a form has been started and saved by an onboardee the form cannot be edited. To create a new version of the form you need to create a Copy.

To copy a form you can either select the Copy action from the right hand side of the Forms list:



Or you can click in the Form you want to change and select the 'Copy Form' button.

When you copy a Form the system creates a duplicate of the existing Form but without a Reference or Companies selected.



We suggest you name the Reference for the new Form with a new version number to keep track of the versions you have used. Then you can make the required changes to Sections and Fields, then select the relevant Companies to create the new version of your form.

Please note that you will need to change the Form in existing Onboardee processes and Templates in order to start using the new Form.

Extracting Form Data

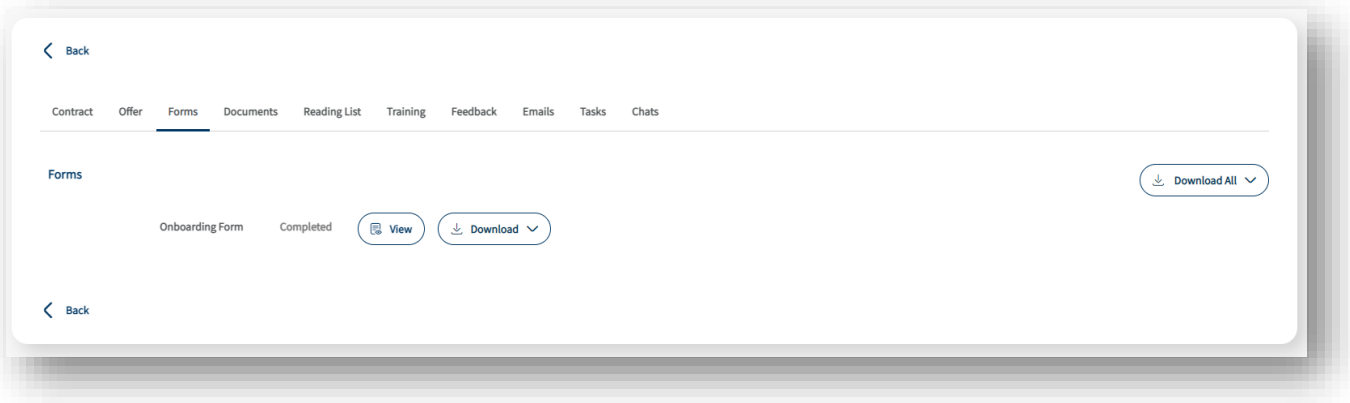
There are several ways that you can start to extract the data that onboardees enter into their Forms.

You can extract the information from an onboardee's profile. If you go to Onboardees and then select the profile of the onboardee you want to get the data for.

One method of getting the information from here is to use the 'Download' button which will download all of the onboardee's documents as a ZIP file including all the Forms they completed as PDF versions of the data they input.

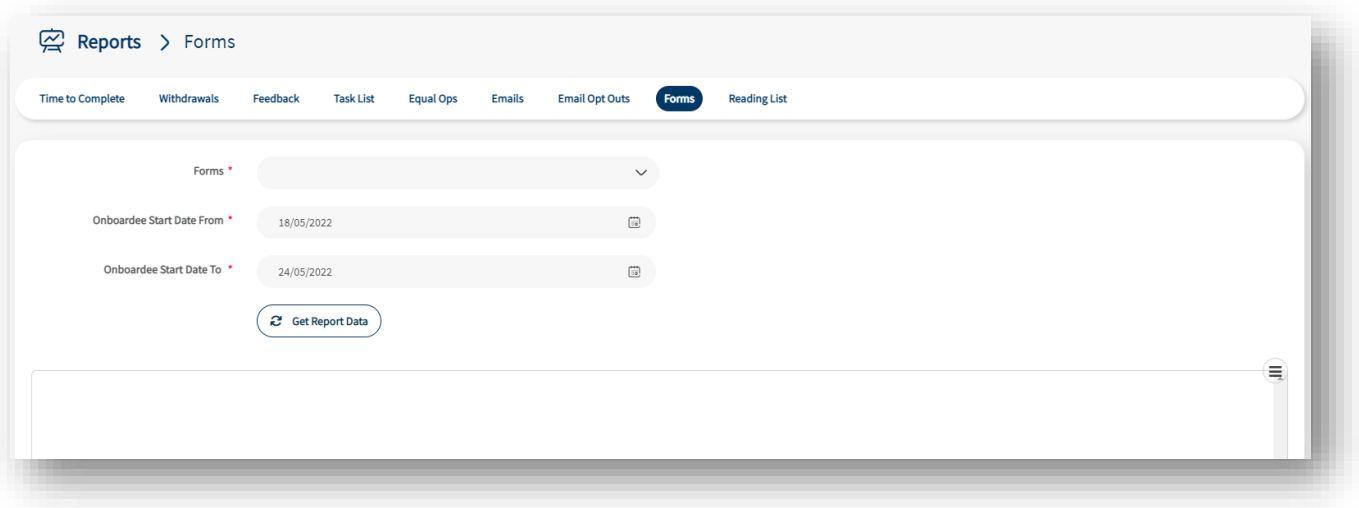
You can also get just the form information from the 'Onboardee Activity' section. Simply click on that heading and then go to Forms. In here you have a few options.

On the right you can 'Download All' this will download all the Forms completed by the Onboardee as a ZIP file with a choice on whether it is a PDF or CSV download. You can also use the 'Download' button against the individual Form to as a PDF or CSV.



File Type	Description
PDF	This type is essentially a recreation of the Form in your system as a PDF. It includes all the questions as well as the responses given.
CSV	This version is a CSV spreadsheet of the data. Instead of questions it has the details that were used as the Section and Field Keys separated by an underscore, these are used as the column headings. e.g SectionKey_FieldKey

You can also extract data for multiple onboardees in a single report. This can be accessed in the Reports section. Navigate to Reports > Forms and then use the dropdown list against the Forms heading to find the Form you want to extract. Then you can add the From and To date for the data, this looks at the onboardee's start date to filter the results by those dates.



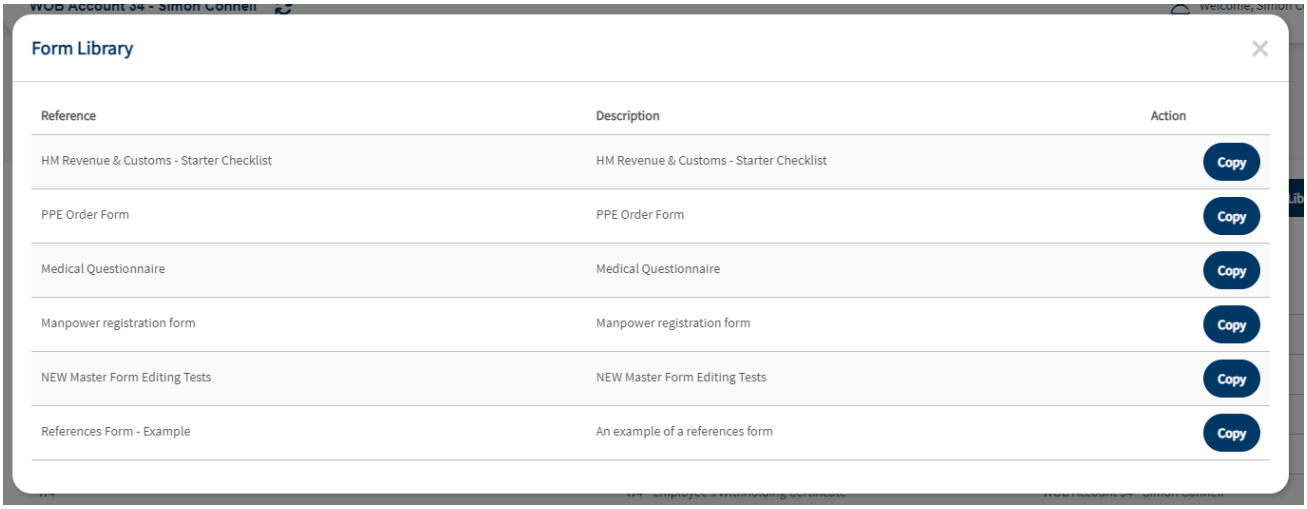
This report is also a CSV and uses the same structure as the individual CSV but can have multiple onboardee's information on them.

The Form Library

The Form Library is a shortcut to creating standard forms from templates that have been created by Webonboarding do that you can add them to your Form list and customise them for your needs.

Using The Form Library

Navigate to Forms and then click on the ‘Form Library’ button to see a list of the available Forms:



You can then click ‘Copy’ from the Actions against the Form you want to use. This will open up the form as if it’s just been created on your system. From here you can edit the form and assign it to the relevant companies as you would with a standard Form.

Please see the guides for Creating and Editing Forms for more information on this.