

HRCenter Form Builder

Last Modified on 08/02/2023 2:03 pm CDT

HRCenter Form Builder

Users that have access to HRCenter Administration have the ability to use a tool called Form Builder to take their paper documents and create digital versions that will be signed by employees and service reps. This article is a guide that will walk you through the process of building these articles.

Note Before getting started, please see [When and When Not to Use the HRCenter Form Builder](#) to determine whether a custom form will need to be developed. If you have determined that a custom form is not necessary, please continue with this article.

[How To Use the HRCenter Form Builder](#) from TempWorks Training on [Vimeo](#).

For best viewing quality, expand the HD option, and select 1080p:



Creating a New Form

Existing company or client forms can be uploaded for use in HRCenter using its administration site's "Form Creator". Once the process outlined below is completed, newly created forms can be added into existing workflows, or be assigned as additional pages for employees to complete. Forms can include, but are not limited to, background check authorizations, company policies, direct deposit, PTO agreements, etc.

To create a new form, navigate to the 'Forms' section of HRCenter's administration site and select 'New':

HRCenter Hello host!tworks.demo! [Log off](#)

[Workflows](#)
[Pages](#)
[Surveys](#)
Forms
[Tools](#)

Forms New

Active Inactive

6 Forms

- Direct Deposit
- Drug Release Form
- Neg PTO Training Rep Form
- Negative PTO
- Negative PTO FOR TRAINING

A 'New Form' line will then appear under the list of forms. Click this line to expand and begin editing the form's information:

Forms New

Active Inactive

11 Forms

- Awesome Training Form
- Background Check Authorization
- Background Check Form
- Card Authorization
- Direct Deposit
- Drug Release Form
- Neg PTO Training Rep Form
- Negative PTO
- Negative PTO FOR TRAINING
- Negative PTO Representative
- New Form ▼

After clicking 'New Form', enter the Display Name (1.), Description (2.), and Private Name (3.), then indicate what

Form Type (4.), select 'Save'. After saving the name click 'Edit Form' to begin.

Note Users will only select a "Form Type" if the form is a direct deposit so you get the direct deposit fields and post-fill procedure.

New Form ▲

1. Display Name	<input type="text" value="Background Check Authorizatio"/>	3. Private Name	<input type="text" value="Background Check"/>
2. Description	<input type="text" value="Employee Background check authorization"/>	4. Form Type	<input type="text" value=""/>

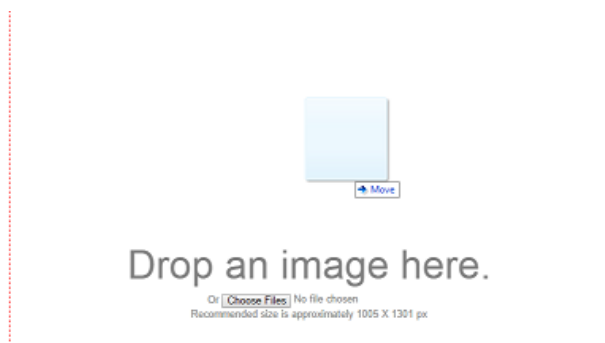
The HRCenter form builder overlays fields on top of an existing image of the form.

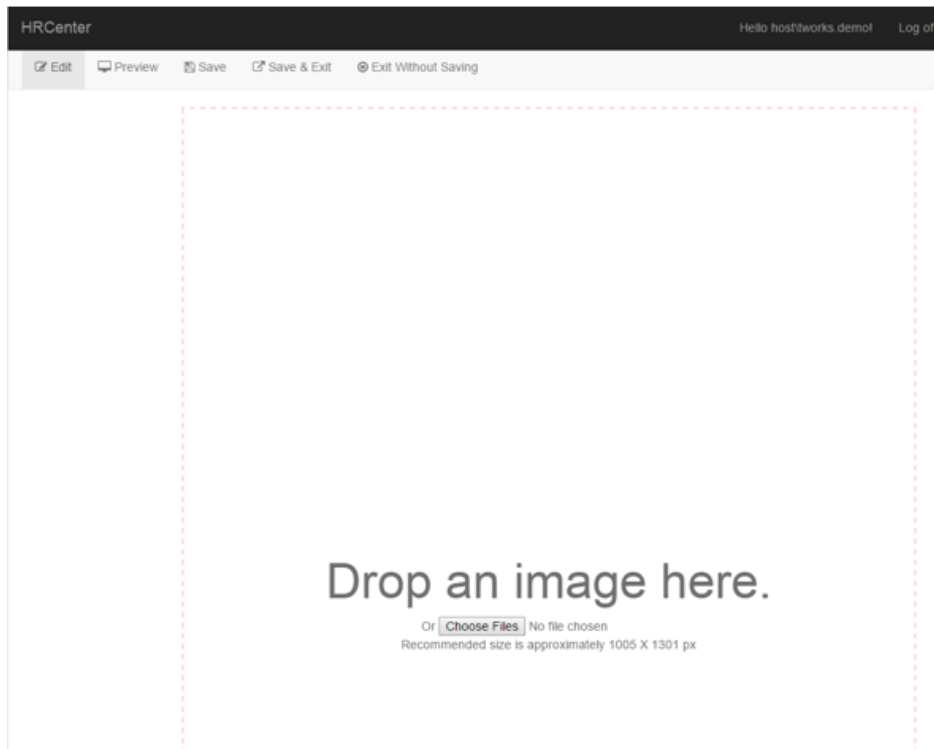
Note Depending on the format of the form, you may upload a .PNG, .JPG, PDF, or Word Doc format.

When uploading a PDF or Word Doc file, only the first five pages will be uploaded. Please be aware that the document is automatically converted to an image, and it may affect the sizing of the form if returned to the employee documents section.

Therefore, it is recommended to upload a .PNG or .JPG image.

You may drag and drop the file, or select the 'Choose Files' option to locate and place the image on the "Drop an image here" area.

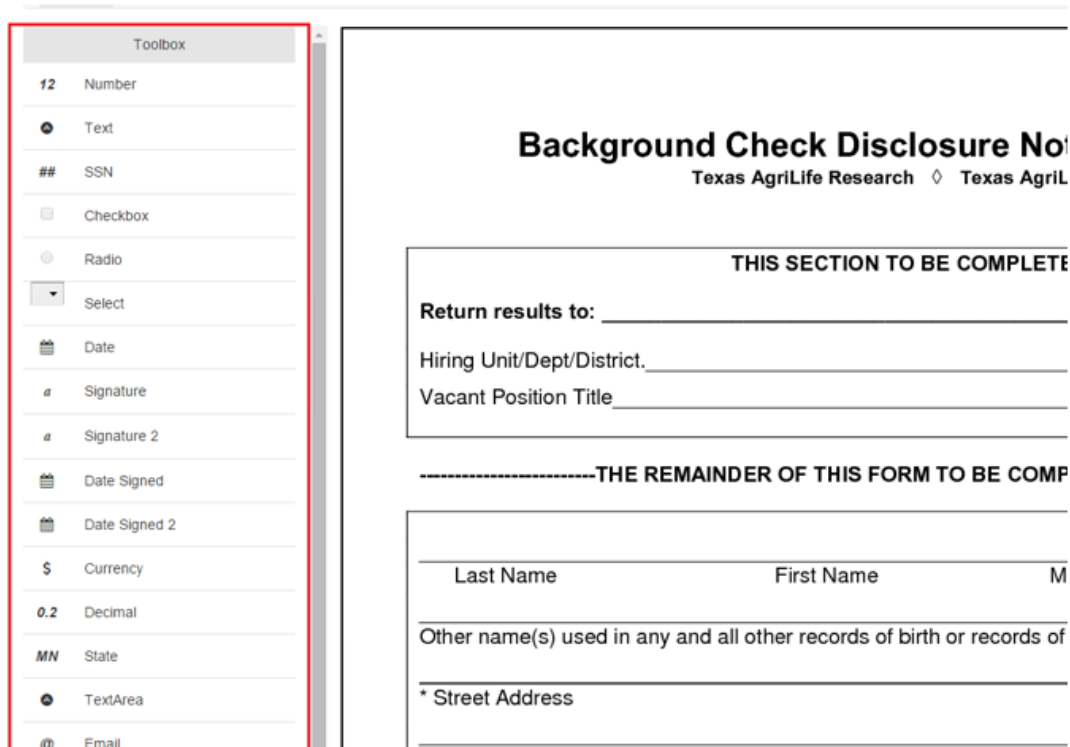




Note Once the pages have been uploaded and converted to images, you will have the opportunity to reorder the pages as you see fit.

Assigning Fields

Once the image has loaded, the 'Toolbox' area will list various fields that can be added to the form. These fields determine what format the answer will be in, whether it is a number, text, or signature type, etc:



Note The fields listed in the Toolbox area are not editable or customizable.

Drag and drop the toolbox options into their corresponding fields on the form as shown:

Hiring Unit/Dept/District _____ Prospective Supervisor _____
Vacant Position Title _____ NOV# _____

-----THE REMAINDER OF THIS FORM TO BE COMPLETED BY THE APPLICANT-----

2. [] [] []
Last Name First Name Middle Name or Initial UIN (if available)

Other name(s) used in any and all other records of birth or records of residence. [] 1.

* Street Address [] 7. Apartment # [] 8.
AL

City [] 6. County [] 3. State [] 5. Zip

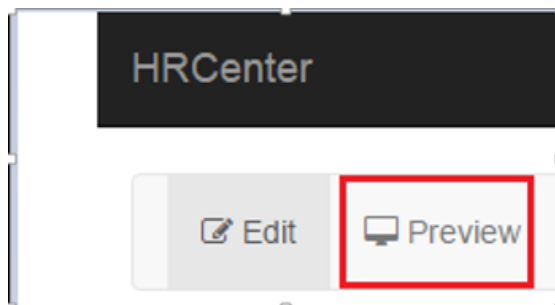
** Date of Birth ** Social Security Number ** Gender ** Race [] 4.

** Driver's license # State issuing driver's license Commercial? [] Yes [] No
** TO BE USED SOLELY FOR THE PURPOSE OF CONDUCTING A BACKGROUND CHECK.

In connection with my application for employment, my continued employment, or in connection with my desire to engage in volunteer activities, I have been advised and I hereby consent and authorize either Agency and its agent, at any time during my application process and/or employment, to obtain an investigative consumer report that may include, but not be limited to, a criminal record check, employment and education verifications, verifications of personal references and reputation; and driving record. I do hereby consent and authorize either Agency and its agent to use any information provided on this form or during the application process in obtaining the investigative consumer report. I have been informed that I have the right to review and challenge any negative information that would adversely impact me or adversely affect a decision to offer employment. I agree to release, indemnify and hold harmless either Agency and any consumer reporting agency used by either Agency with regard to any information reported by the consumer reporting agency. I understand that I am to be provided the name, address and telephone number of the consumer reporting agency and the nature and scope of the investigative report will be disclosed to me. I acknowledge that facsimile, copy or email of this document shall have the same validity, force and effect as the original.

The following are my responses to questions about my criminal history, if any. (Exclude minor traffic offenses punishable only by fine. IF YOU ANSWER YES TO ANY OF THE FOLLOWING QUESTIONS, ATTACH DETAILS ON A SEPARATE SHEET OF PAPER TO

To preview how this will look to Employees, select 'Preview', this will allow you to make edits or changes and test validation fields before saving:



<input type="text"/>	<input type="text"/>	<input type="text"/>	
Last Name	First Name	Middle Name or Initial	UIN (if available)
Other name(s) used in any and all other records of birth or records of residence.			
* Street Address			Apartment #
<input type="text"/>			(Please Select) ▾
City	County	State	
<input type="text"/>	<input type="text"/>	(Please Select) ▾	
** Date of Birth	** Social Security Number	** Gender	** Race
** Driver's license #	State issuing driver's license	Commercial?	
** TO BE USED SOLELY FOR THE PURPOSE OF CONDUCTING A BACKGROUND CHECK.			

Properties

When selecting a field, the selected field will be highlighted in pink. On the right side of the screen its properties can be viewed.

Select a specific field (1.) to open the (2.) Properties and Dependencies section. If you wish to remove a field, select (3.) Delete.

The screenshot shows a form editor interface. On the left is a preview of a form titled "Background Check Disclosure Notice – Authorization Form" (AG-473 (rev. 12/9/08)) from Texas AgriLife Research and Texas AgriLife Extension Service. The form has two main sections: "THIS SECTION TO BE COMPLETED BY HIRING UNIT" and "THE REMAINDER OF THIS FORM TO BE COMPLETED BY THE APPLICANT". The applicant section contains three text input fields: "First Name", "Middle Name or Initial", and "UIN (if available)". The "First Name" field is highlighted in pink. On the right is a "Properties" sidebar for the selected field. It shows: X: 406, Y: 477, Type: Text, Name: (no name assigned), Required: , Disabled: , Default Value: , Max Length: , and a "Delete" button. A red "2." is above the sidebar, and a red "3." is next to a "Show Advanced" checkbox.

Within the "Properties" area, the type of field selected from the toolbox is listed under "Type"; in this example it is "Text."

Additional criteria can be entered to customize whether a field is required, the amount of characters which can be added into a specific field, and whether or not information should be prefilled into the form depending on the field type.

Note Fields must have unique names in order to be recorded and recognized as separate values.

For example, if you are creating an insurance form and have space to enter dependent information, you would then name the fields something like "dependentname1", "dependentname2", "dependentname3", and so on. If you list them all as "dependentname", all the fields will share the same storage space and only the value in the last field sharing that field name will be recorded.

In circumstances where information is pre-filled to the form, you may prevent Employees from modifying the field by selecting the "Disabled" checkbox. This is helpful in scenarios where items like a Social Security Number, or First/Last name should not be modified after initially entered by an Employee.

The screenshot shows a configuration interface with two tabs: 'Properties' (selected) and 'Dependencies'. The 'Properties' tab contains the following fields and controls:

- X: 406 (position)
- Y: 477 (position)
- Type: Text
- Name: Employee_FirstName
- Required:
- Disabled:
- Default Value: (empty text box)
- Max Length: 12
- Show Advanced:
- Delete button (orange)

Note The "Show Advanced" option is for TempWorks' use only.

Depending on the field type you are editing, additional answer options can be selected. For example, within the Gender field, the type chosen was "Select." You may add values the applicant can select from such as Male, Female, or I choose not to disclose in the "Options" section. To add those field values, select options, + icon.

AG-473 (rev. 12/9/08)

Disclosure Notice – Authorization Form

Texas AgriLife Extension Service

TO BE COMPLETED BY HIRING UNIT

ADLOC: 06 07

Prospective Supervisor _____

NOV# _____

TO BE COMPLETED BY THE APPLICANT-----

Middle Name or Initial _____ UIN (if available) _____

h or records of residence. _____

Apartment #

State Zip

** Gender ** Race

Properties Dependencies

X: 675 Y: 719

Type

Name

Required

Disabled

Default Value

Options

Delete

Continue to select the + icon until all values have been added. Once completed, the Gender field now displays the chosen options in its dropdown.

Female

Male

Options I choose not to disclose

State

(Please Select)

(Please Select)

Female

Male

I choose not to disclose

er's license _____ Comm _____

ONDUCTING A BACKGROUND CHECK.

oyment, or in connection with my desire to enga

Selecting Checkbox (1.) within the form will allow for the applicant to select more than one option for their response. Choosing the Radio (2.) option on the form limits the applicant to only choosing one of the available options.

The image shows a form editor interface. On the left is a 'Toolbox' with various form elements. The 'Radio' element is highlighted with a red box and labeled '2.'. On the right is a preview of a form with several sections: 'Company Address:', 'I want to donate for:' (with checkboxes for Faculty, Hostel, Department, Student, and Institute Development), 'Remarks, if any, about your donation target:', 'I will donate a sum of', 'I will pay by:' (with radio buttons for Monthly, Quarterly, Bi-annually, Annually, and One time), and 'I will pay by:' (with checkboxes for Cheques, Credit Card, Electronic Bank, and Periodic Transfer options).

In order for checkboxes or radio options to work properly with one another, they will need to be grouped together. To do this, select the checkboxes together and enter a Group Name.

Note Users may only group the same toolbox item together. This may not be used to combine checkbox with radio option.

The checkbox highlighted in red indicates that you are currently editing and placing it into a group name (Donate), those outlined with the dotted line display that they were also added as part of the Group Name (Donate). You will follow the above steps to enter the Radio options into a group.

This screenshot shows the form editor with a 'Hostel Development' checkbox highlighted in red. The 'Properties' panel on the right shows the 'Group Name' field set to 'Donate', which is also highlighted in red. Other checkboxes like 'Faculty Development' and 'Department Development' are outlined with a dotted line, indicating they are part of the same group.

This screenshot shows the form editor with a 'Bi-annually' radio button highlighted in red. The 'Properties' panel on the right shows the 'Group Name' field set to 'Monies', which is also highlighted in red. Other radio buttons like 'Monthly', 'Quarterly', 'Annually', and 'One time' are outlined with a dotted line, indicating they are part of the same group.

Once this is completed, preview the form to ensure the grouping has been setup correctly:

Company Address: _____

I want to donate for:

Faculty Development Hostel Development Department Development

Student Development Institute Development

Remarks, if any, about your donation target: _____

I will donate a sum of _____

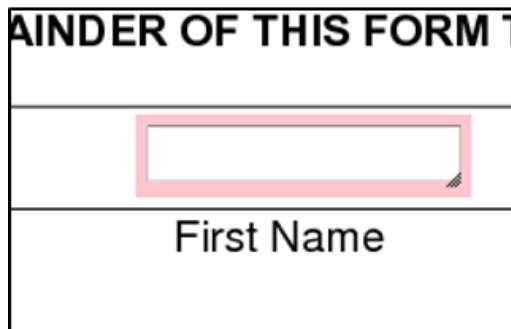
Monthly Quarterly Bi-annually Annually One time

I will pay by: Cheques / post dated cheques Credit Card transfer Electronic Bank transfer

Periodic Transfer advice to my bank Periodic Transfer Advice to my Credit Card Company

Once Checkboxes or Radio options are added to the form, making one option required will automatically make the entire group required fields.

As the form continues to be built you have the ability to map information to correlating fields within Enterprise. Select the field, in this example we've chosen First Name, navigate to Properties, select Name.



Properties Dependencies

X: 406 Y: 477

Type Text

Name (no name assigned)

Required

Disabled

Default Value

Max Length

Show Advanced

Delete

Within the "Select an option" window click "Mapped Name" and select from the category drop down. Indicate

whether the field is Personal Information, Address Related, Contact Information, or Employer Related. Once the Category is chosen, select from the "Field" option to indicate which corresponding field in Enterprise the information should map to.

Select an option:

Mapped Name

Select a category, then a field to associate with.

Category:

Personal Information ▼

Field:

First Name ▼

If you do not wish to associate the field to anywhere in Enterprise, choose the "Do not associate any field" option.

OR

Do not associate any field.

OR

Give the field a specific name:

Note Additional mapping to Enterprise which isn't listed under the Mapped Name > Category section will be handled by Tempworks.

Dependencies

Utilize this area to hide and clear fields depending upon the question within the form.

Note For more information on how to setup Dependencies visit [Dependencies in the HRCenter Form Builder](#).

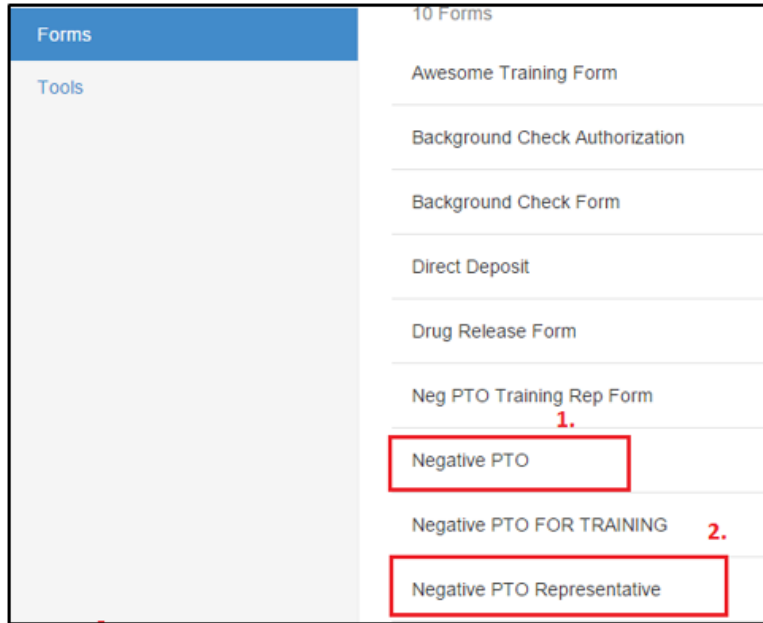
Replacing Background Images

There may come a time where you have realized that the background image needs to be replaced within the form.

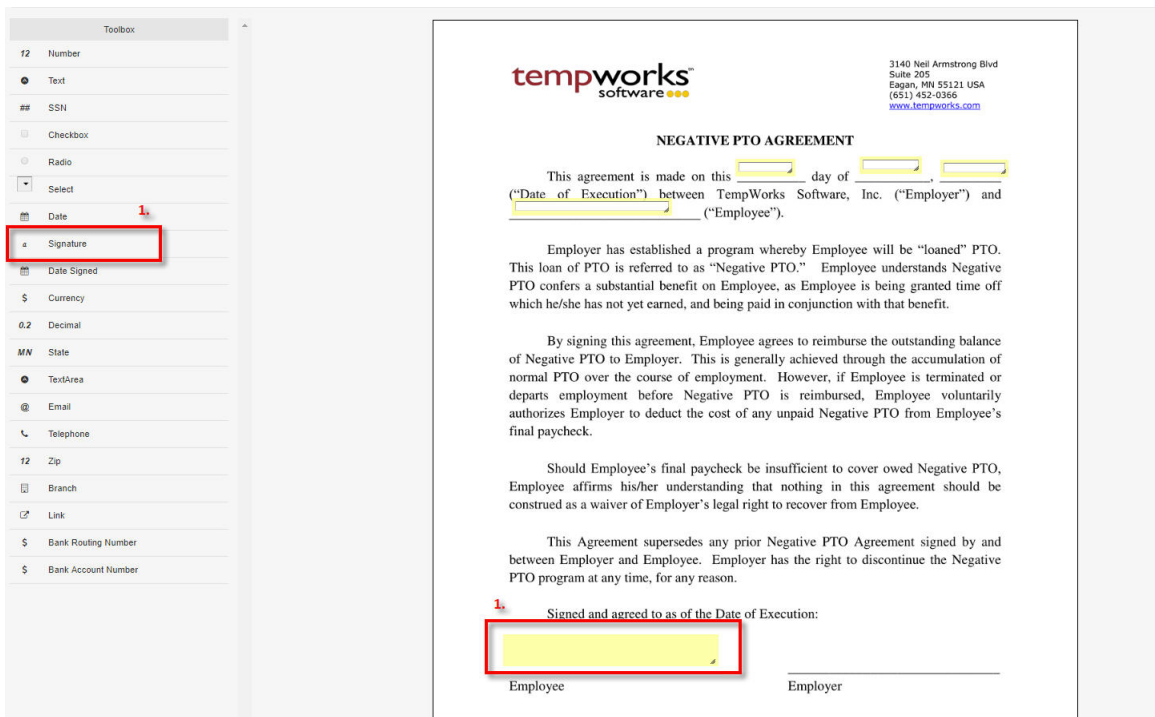
In the event this happens, you can simply navigate to the bottom of the page and swap the image. If you had previously added fields, these will remain even if the image is swapped.

Service Rep Forms, Localization

Forms that require an applicant and employer signature need to be uploaded twice (once for each signature) and grouped within the Pages section. If you have forms which require localization (different languages), you will be adding 4 files; 2 for the English versions and 2 for the other language's translation. In the example below, "Negative PTO" has been added for both the Employee and Representative and labeled accordingly.



Form one (Negative PTO) - Select the Signature option within the Toolbox area, this indicates that you are obtaining the Employee signature.



Form 2 (Negative PTO Representative) - Select Signature to obtain the Employer signature.

The image shows a form design interface. On the left is a 'Toolbox' with various form elements. The 'Signature' element is highlighted with a red box and a '2'. On the right is a preview of a 'NEGATIVE PTO AGREEMENT' form. The form includes the TempWorks Software logo, contact information, and several paragraphs of text. A signature box for the Employer is highlighted with a red box and a '2'.

Adding the Created Form to HRCenter's Pages section

Once these two forms have been created, link them together by navigating to the Pages area of HRCenter administration, select "New". Enter the Private Name, Display Name and Description once the "Create Page" window appears.

The image shows the 'CREATE PAGE' window. It has a title bar with 'CREATE PAGE' and a close button. Below the title bar is the heading 'Create Page' and a brief description: 'A page is where you decide how you want to present the information to your applicants. We support anything from html forms to survey question type pages.' There are three input fields: 'Private Name' (containing 'Negative PTO'), 'DisplayName' (containing 'Negative PTO'), and 'Description'. To the right is the 'Page Type' section with three radio button options: 'Information', 'Survey', and 'Form'. The 'Form' option is selected and highlighted in blue. At the bottom, there is a 'Page' indicator with a dot and a right-pointing arrow.

Under the Page Type, select the Form radio button, clicking the > in the lower portion of the window to advance to the Premade Form section.

Select the "Use Premade" option and use each of the dropdown menus to link the Applicant and Service Rep files together. If there are any translations of the form in a different language, click "add localization" to choose any

language(s) and additional file(s) from the corresponding dropdowns.

The screenshot shows a window titled "CREATE PAGE" with a close button in the top right corner. On the left, there is a sidebar with two options: "Use Premade" (which is selected and highlighted) and "Create Custom". The main area is titled "Premade Form" and contains the following elements:

- Instruction: "Select the form by name below."
- Section: "Applicant" with a dropdown menu showing "Negative PTO".
- Section: "Service Rep (If Desired)" with a dropdown menu showing "Negative PTO Representative".
- Section: "Localizations:" with a dropdown menu showing "Spanish" and a link "add localization".
- Section: "Applicant Form:" with a dropdown menu showing "Negative PTO" and a blue "Add" button.
- Section: "Service Rep Form:" with a dropdown menu showing "Negative PTO".

At the bottom of the window, there is a "Page" indicator showing "2" and navigation arrows.

Note The Create Custom section is for internal TempWorks use only

Once the files have been selected, additional configurations can be setup. Users will have the ability to select what the files will fall under within the Document Type category that appears within Enterprise. If a service representative needs to attach documents such as a driver's license, SS card, etc. this can be added within the maximum and minimum documents area.

Form destination should be set to PDF format to appear correctly within Enterprise.

Once the Configuration Details section has been completed, click the > icon in the bottom right hand corner of the window and then the check mark icon to save the page. The newly created Form can now be assigned on its own, or added to a workflow form within the Workflows area of HRCenter's administration site.

Configuration Details

Category
The category this block will belong to. Information blocks default to Info Blocks, Survey blocks default to Survey Blocks, Form blocks default to Form Blocks.

Document Type
Select a document type for this form.

Form Destination
PDF or NONE

Maximum Documents
Maximum number of files allowed to be attached when the Approver is signing the form.

Minimum Required Documents
Number of files that are required to be attached when the Approver is signing the form.

Postfill Procedure
If a procedure other than the standard postfill procedure should be used, please enter it here.

Prefill Procedure
If a procedure other than the standard prefill procedure should be used, please enter it here.

Service Rep Postfill Procedure
If a postfill procedure is required after the service rep signature, please enter it here.

Page ● ● ● ● < >

Note Postfill and Prefill Procedure fields are for internal TempWorks use only. These are used to map data between forms and TempWorks Enterprise for fields that are not available in the Select an Option field area mentioned earlier in this article.

Related Articles