

Mobile Forms

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What are Mobile Friendly Forms?

Mobile Friendly Forms take your form pages to the next level making it easier for applicants and employees to fill out forms on mobile devices.

Note To access this functionality, you will need to be an HRCenter™ admin. If you are unsure of whether you are an HRCenter admin consult your Bridge admin, if you are unaware of your HRCenter admin URL reach out to your TempWorks Account Manager.

If you are trying to create a mobile friendly version of a form created by a TempWorks rep, you may need to contact TempWorks support for assistance. Any form that can not be found under the forms section of HRCenter Admin has been custom made and will need the help from a TempWorks Rep to link the fields.

Traditional HRCenter Forms

Our traditional forms work great on large computer screens but can be a difficult experience for employees on smaller devices where they have to scroll vertically and horizontally to see the full form.

If you've never created a survey, check out the following links for more information

- Video: [HRCenter Admin: Surveys](#)
- Article: [How to Create Surveys](#)

Planning out your survey

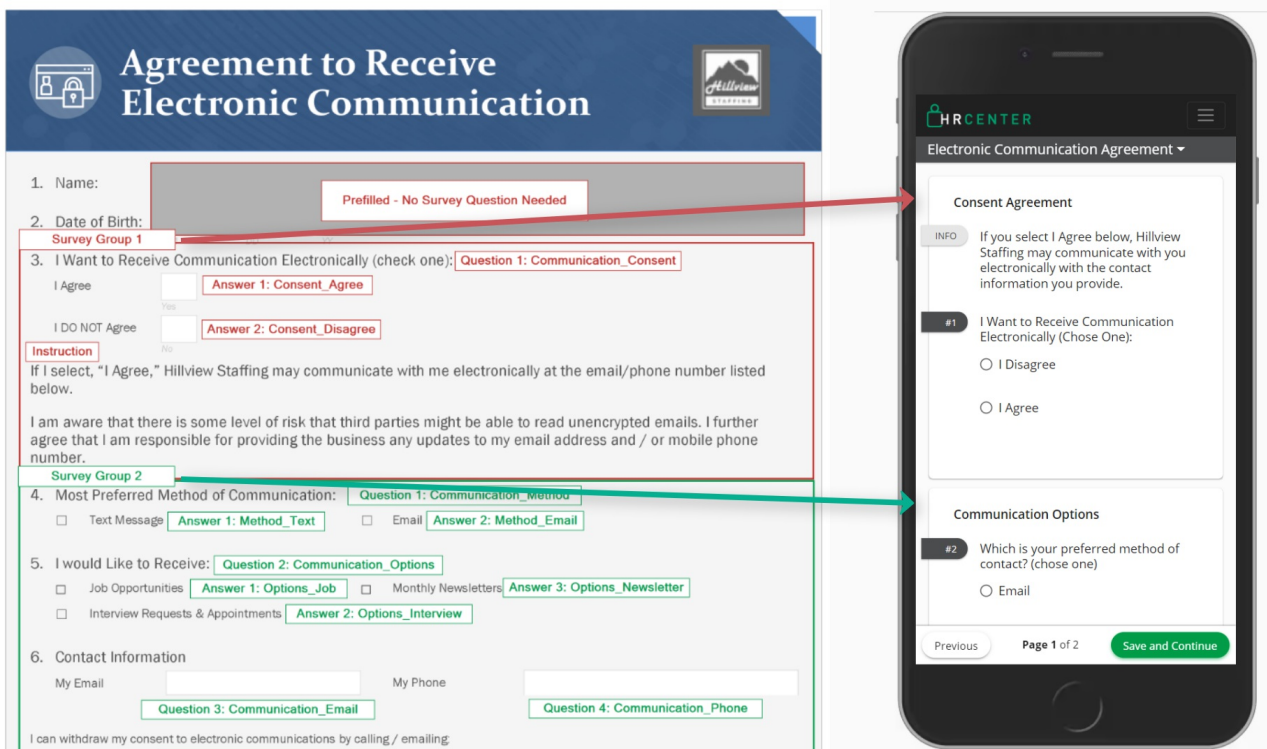
Before you create your survey, take a look at your form to plan out how you want your survey to look. We recommend that you keep a copy of your form to write on so you can mock up what your survey will look like.

Check out this mark up example: [Hillview Electronic Communication Agreement Marked Up.png](#) 

Group your questions

Surveys allow you group questions which can help break up longer forms that have lots of information for the employee to fill out. Consider grouping like questions or create groups based on different sections of your form. Each survey must have at least one group.

Example:



Consider Prefilled Information

If you have fields on your form that you already have in your system, such as first and last name, you can prefill that information on the form. If it's prefilled on the form, you don't need to add it as a survey question. This can make it easier for employees so they don't have to type their name in for every form they have to fill out.

If you have some information that you may or may not have gathered from the employee yet, there is a way to prefill information on the survey. Check out [Prefilling and Postfilling Survey Answers](#).

Decide on Your Question Options

Survey questions can have an answer type of radio, checkbox, textbox, textarea, or date. For each question you identify from your form, consider which answer type it will need to be. If you are choosing radio or checkbox, take a look at what answer options will need to be added.

Electronic Communication Agreement ▾

Communication Options

#2 Which is your preferred method of contact? (chose one)

Email **Radio Dial**

Text

#3 I would like to receive

Job Opportunities

Monthly Newsletter **Checkbox**

Interview Requests & Appointments

#4 Email Address: **Textbox**

#5 Phone Number

Previous

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Save and Continue

Creating Your Survey

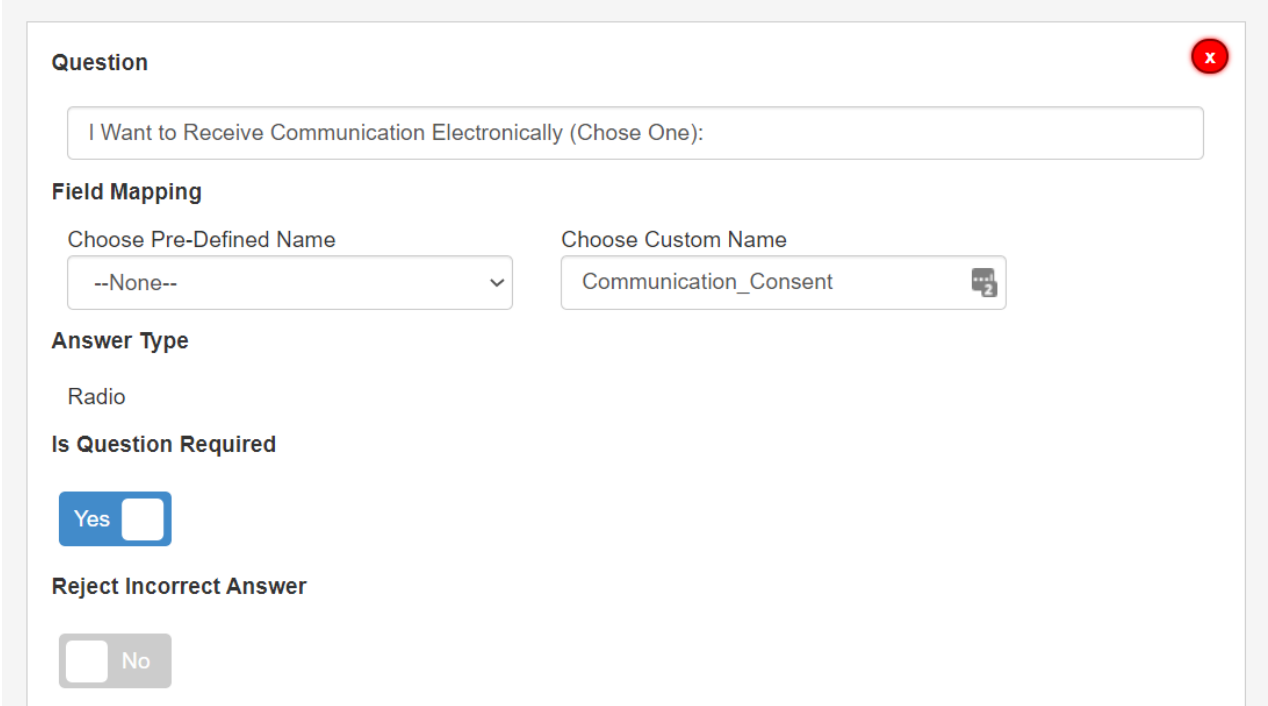
1. Create a new survey
2. Create the survey groups for your form
3. Enter questions based on fields you need to fill out on your form
4. Name the questions and answers you create so that you can link them to the fields on the form later

Two fields to keep in mind while creating your survey:

Choose Custom Name (for Field Mapping):

For each question you enter on your survey, you will need to enter a custom name. Custom names will allow you to match the questions to fields on your form as needed.

Remember that names can have capital or lower case letters and underscores but no spaces.



The screenshot shows a configuration window for a survey question. At the top, the word "Question" is displayed in bold, with a red close button (an 'x' in a circle) to its right. Below this is a text input field containing the question text: "I Want to Receive Communication Electronically (Chose One):". Underneath the question text is the "Field Mapping" section, which contains two dropdown menus. The first is labeled "Choose Pre-Defined Name" and currently shows "--None--". The second is labeled "Choose Custom Name" and shows "Communication_Consent". Below the field mapping is the "Answer Type" section, which has a "Radio" option selected. The "Is Question Required" section has a "Yes" button with a checked checkbox. The "Reject Incorrect Answer" section has a "No" button with an unchecked checkbox.

Write down the custom name on your marked up copy of your form so you can easily refer back to it when you are linking the form.

Value Of Answer (for Answers):

If you are utilizing radio or checkbox questions, when you enter the possible answers you will need to also enter a value. This is similar to naming the question and it will allow you to link it to a specific field on your form.

Answer Text x

I Disagree

Value Of Answer

Consent_Disagree Use Answer Text As Value Use Random Value

Is This The Correct Answer

No

Values can have capital or lower case letters and underscores but no spaces.

Write down the answer value on your marked up copy of your form so you can easily refer back to it when you are linking the form fields. Make sure your answers are clear enough for you to pick out later when linking your form.

Note In order for the survey to link correctly to the form, you will need to make sure that every 'Choose Custom Name' and 'Value Of Answer' is specific to their respective question and answer.

Ex. if you have multiple questions they could agree or disagree to, do not enter I_agree as an answer because you will not know which statement you are agreeing or disagreeing with.

Note When setting up the survey, make sure all dependencies are labeled per question and answer. This includes whether or not a question is required, whether or not an answer is the correct one, etc. With the dependencies labeled within the survey, extra work will not need to be done when creating the form.

Creating the Form

With the survey completed, it is time to create the form in which the survey will be linked to. Check out the video below to walk through the second half of our process.

If you've never created a form before, check out the following links for more information:

- Video: [HRCenter Admin: Form Builder](#)
- Article: [HRCenter Form Builder](#)

Linking a Form to a Survey

When initially creating the form, you will see an option for 'Linked Survey'. As long as the survey has been built, it should appear within this drop down. Before editing the form and adding fields, you will want to choose the survey from the dropdown that will be linked to the form:

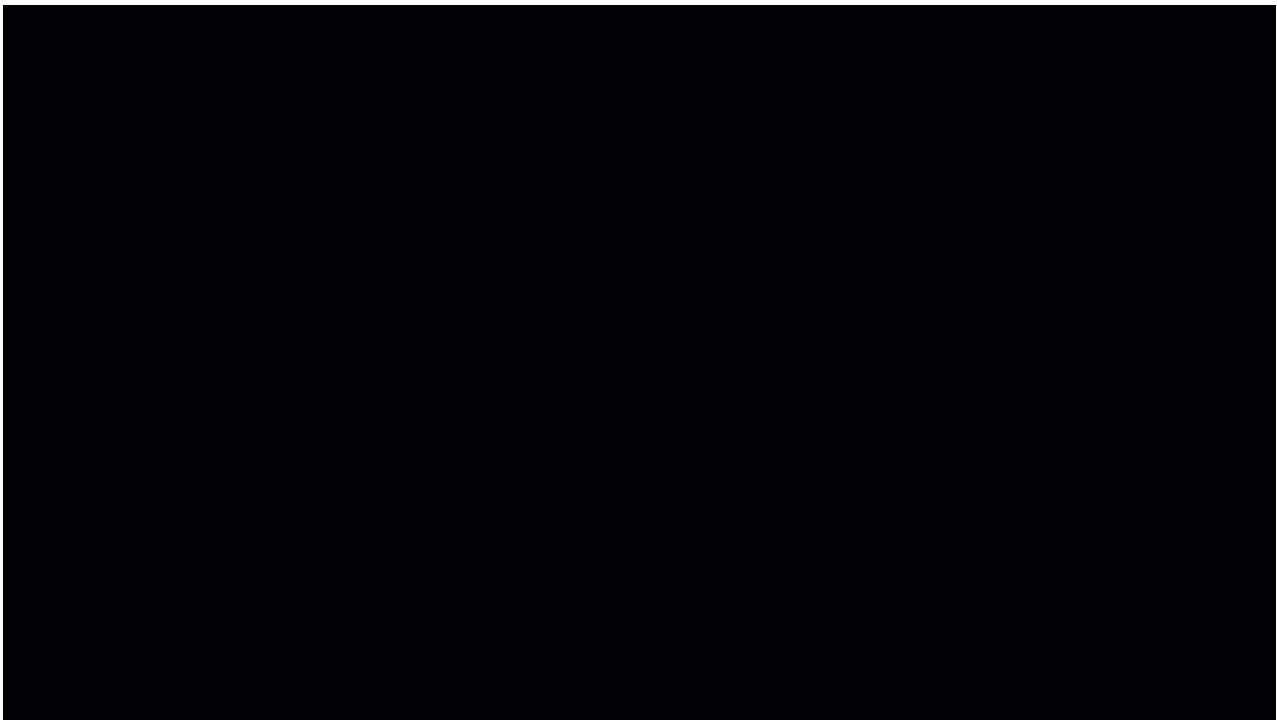
Form Configuration

Display Name Survey Form - Test	Private Name Survey Form - Test
Description 	Postfill Procedure --None--
Signer Type Employee	Linked Survey Survey Form - Test

Last Changed By: Joshua.kramer on: 7-18-2019 7:15 PM UTC Created On: 7-18-2019 6:28 PM UTC

[Edit Form](#) [Deactivate](#) [Save](#)

With the survey linked, select 'Edit Form', add your form image, and drag the intended fields over to the image like with any form. With the fields added within the form image, you will now need to link the survey answers to the form fields. This is done by updating the 'Name' within the 'Properties' window on the right hand side of the Form Builder. In order to update the 'Name', do the following:



To Link a Survey Answer to a Form Field:

1. Select the Form Builder field that needs to be updated
2. Within the 'Properties' window on the right hand side of the Form Builder, select the 'Name' field
3. Select the option for 'Name from linked survey'
4. Within the 'Field' dropdown, select the corresponding name of the field within the survey
5. Select 'OK' to finish linking the fields

Note As long as the survey has been configured correctly, requirements and dependencies on fields within the Form Builder do not need to be set. When the applicant is filling out the form within HRCenter, the

requirements and dependencies of the fields will pull from the survey that is linked to the form.

Once all of the fields have been linked to their respective names, finish building the form and select 'Save' once completed.

Creating the Page

With the survey created and the form linked, you now need to create the page so that it can be assigned or added to workflows for employees to fill out.

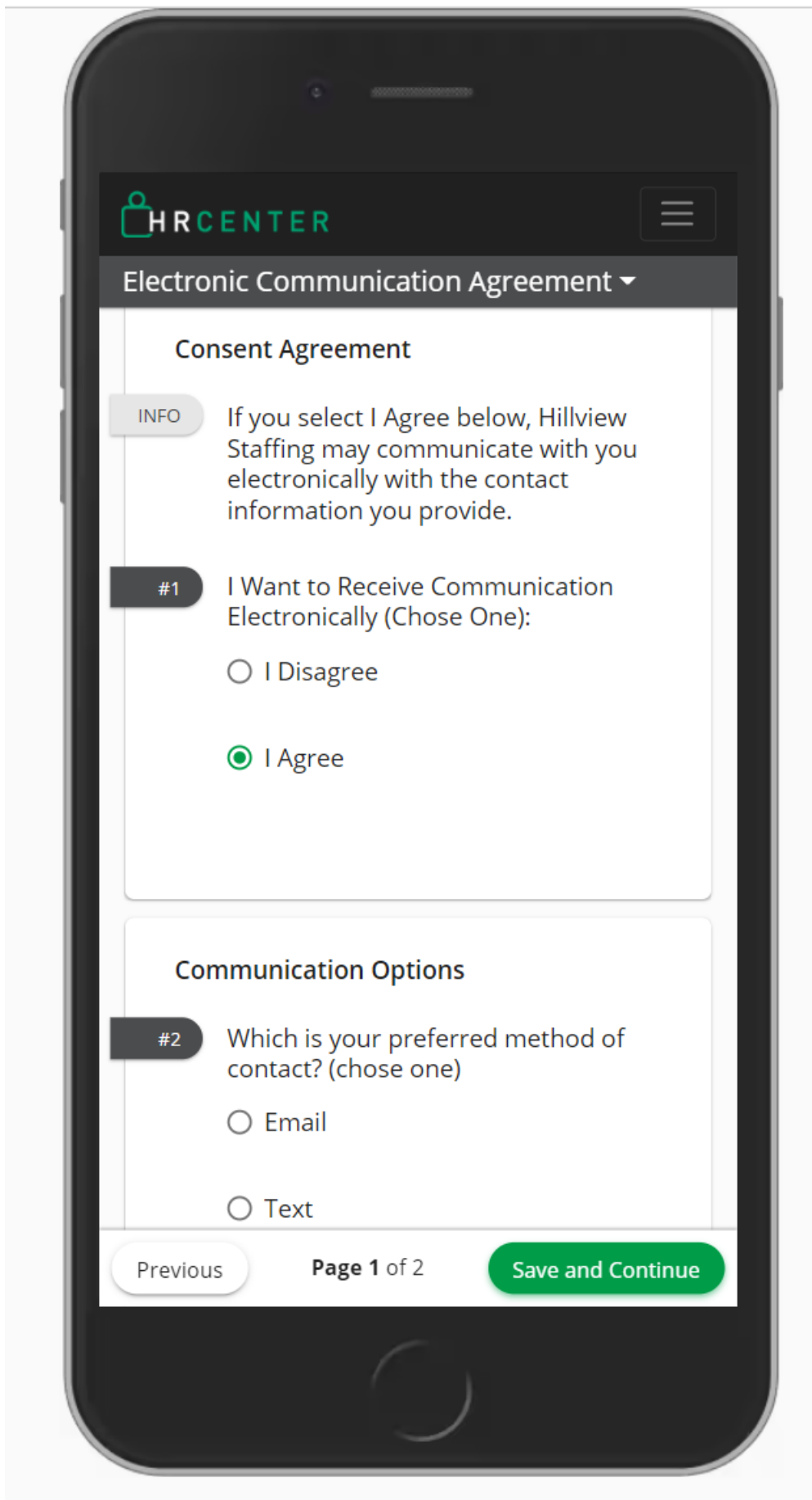
For more information, please view the instructions within the [How to Create Form Pages](#) article.

Once you've created the form page, you will be able to preview the mobile friendly form.

Applicant Example

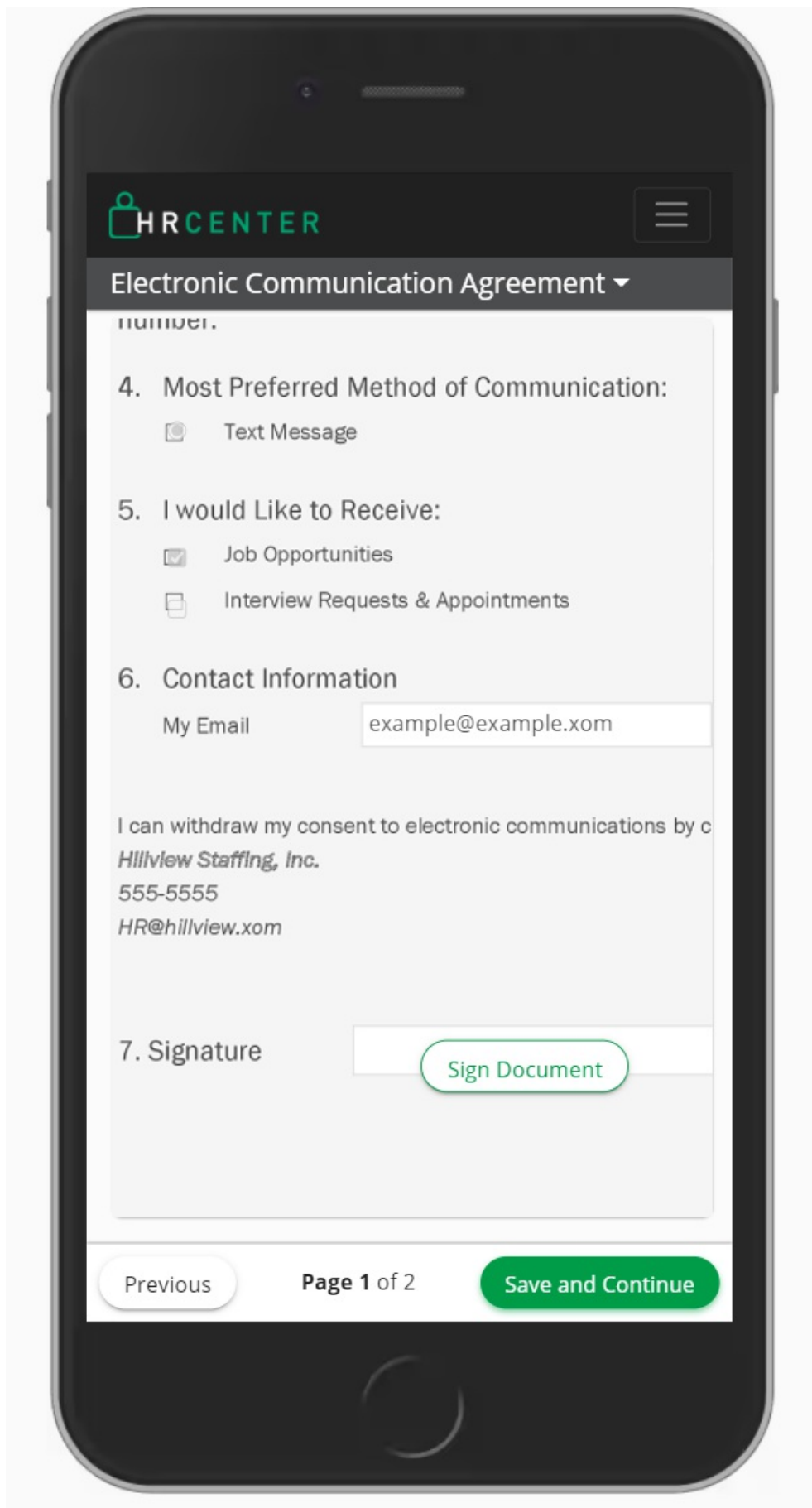
With the Mobile Friendly Form page created, it is time to assign the page and have the applicant fill it out. Below is an example of what the form will look like when being filled out via the applicant on a mobile device.

- When the applicant logs into HRCenter and selects the workflow with the Mobile Friendly Form to fill out, they will see the survey questionnaire first. The applicant answers the questions as necessary:



- With the questions answered, the applicant will select 'Save and Continue' to then see the answers populate

within the form. These answers will be in a Read-Only format in which they cannot be edited unless the applicant selects the 'Previous' option to be brought back to the survey questionnaire:



The applicant will then be able to sign the document and continue to submit the form.

Related Articles