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FlexiForm Template Admin Manual

Introduction

Templates are designed to simplify and speed up the creation of E-forms.
Acting as blueprints, they provide a consistent format with predefined fields, ensuring easy duplication.
This enhances data collection, improves organization, and saves time and effort.

Template Types - Usage Examples

- **Checklists:** Create detailed checklists for quality control, safety inspections, or project management tasks.
  A template can ensure that safety steps are systematically followed and documented.
- **Surveys:** Design surveys for customer feedback, employee satisfaction, or market research. A customer satisfaction survey template, for instance, standardizes questions and simplifies analysis.
- **Decision Trees:** Use step-by-step questions to guide users through complex decisions. A decision tree template, for example, can help troubleshoot technical issues based on user responses.
- **Scorecards:** Evaluate performance, assessments, or compliance with structured scorecards. For instance, a template can streamline employee performance reviews.

Template Style

There are two styles of templates, each designed to meet different data collection and organizational needs:

- **Standard Template**: This template presents a collection of questions without specific sequential logic, allowing users to answer questions in any order.
- **Flow Templates**: This template is designed for processes that require dynamic navigation and logical question flow. Each question leads to the next, allowing for tailored paths based on user responses.

	Standard Template	**Flow Template**
Structure	Collection of questions without specific sequential logic	Set of questions following a specific logic
Question Flow	Questions can be answered in any order	Each question leads to the next one
Checkpoints	No checkpoints; all questions are presented as is	Allows selection of different paths based on responses
Routes	No routing; all questions are static	Multiple routes from the first question to different results
Benefits	Simple, easy to create and use, no complex logic required	Provides dynamic navigation, tailored responses based on input
Usage	Best for straightforward data collection	Best for scenarios needing decision trees or guided processes

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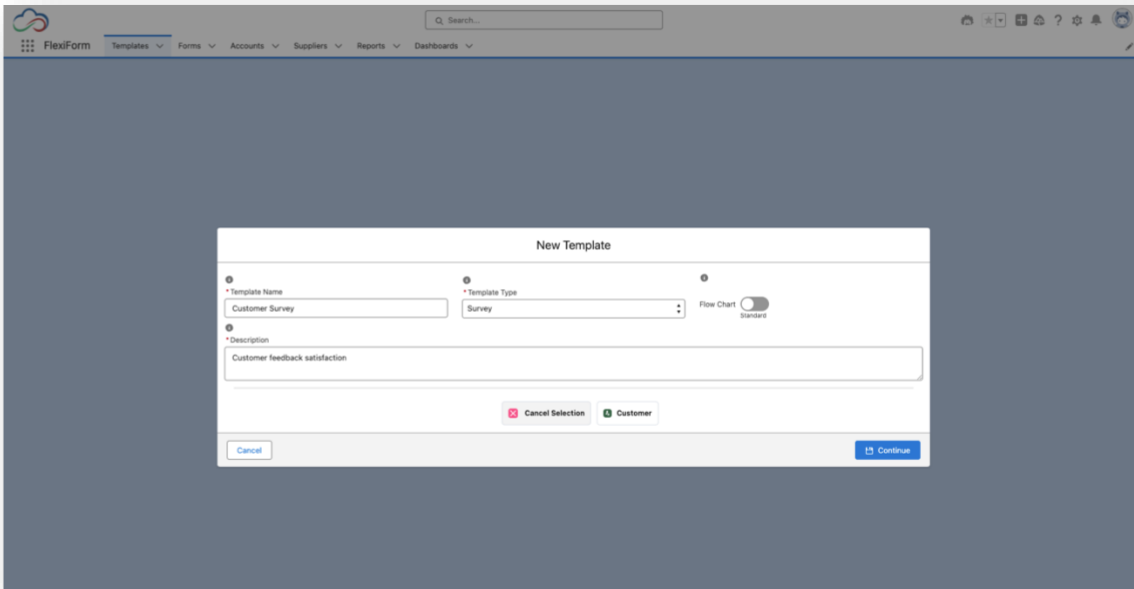
Template Configuration

1. New Template Creation

- Enter a unique and descriptive name for the template.
- Select the template type.
- Toggle to choose whether the template will be standard or flow-based.
- Provide a brief summary of the template's purpose or contents.
- Select the object it will be related to.



2. Template Settings

- **Template Information**
  - **Active Template Toggle:** Use this toggle to activate or deactivate the template. When set to "Active," the template will be available for use as a form in records.

- **Form Access and Visible Parts**
  This section allows to control who can access and edit the form and what information is displayed.
  - **Group Access:** Restrict form editing to specific group members.
  - **Signature Access:** Determines which user, defined in the parent record, is authorized to sign a form.
  - **Private Edit:** Allow only the owner of the template to edit the form based on this template.
  - **Show Comments:** Enable the comments field next to each question in a customer feedback form to capture additional insights.

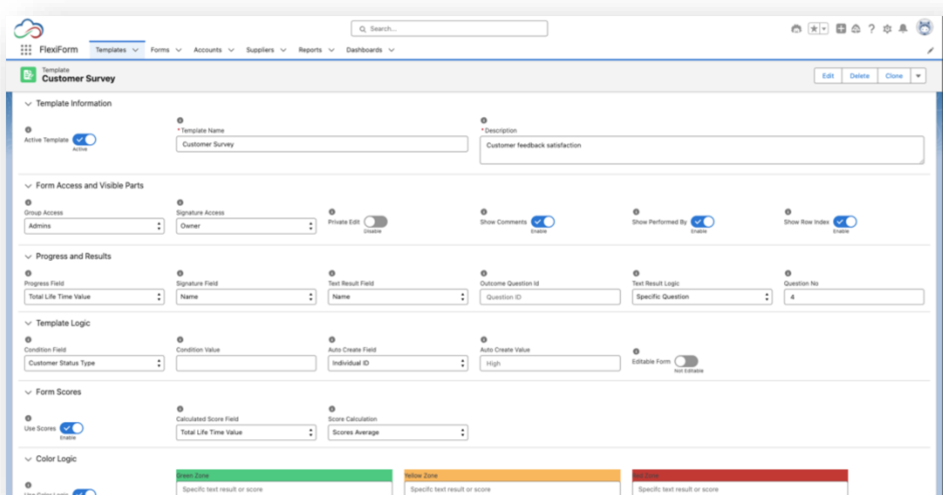
  - **Show Performed By:** Display the name of the person who performed each action in a maintenance log to track responsibility.
  - **Show Row Index:** Number each question in a lengthy survey to make referencing specific questions easier**.**

- **Progress and Result**
  The 'Progress and Results' ensures that key form data—such as progress, outcomes, signatures, and results—are directly and seamlessly integrated into the parent record. This eliminates manual data entry, reduces errors, and makes the captured information available for future analysis or decision-making.
  - **Progress Field:** A numeric field on the parent record that tracks the progress of the form (e.g., percentage of completion).
  - **Signature Field:** A text field on the parent record that captures the signature applied to the form.
  - **Text Result Field:** A text field on the parent record that stores the final textual result of the form.
  - **Outcome Question ID:** Links a specific question in the form to the parent record.
  - **Text Result Logic:** Defines the logic for calculating the textual result of the form based on its responses.

- **Template Logic**
  The 'Template Logic' section allows you to configure various rules and conditions that govern the form's behavior and requirements. These settings ensure that forms are completed and signed correctly, apply specific conditions, and automate form creation based on defined criteria.
  For example, you can:
  - Ensure forms are 100% completed before they can be signed, ensuring thoroughness.
  - Prevent status changes on a parent record until the form is completed and signed, maintaining process integrity.
  - Filter available templates based on specific conditions, such as department or project type, for more relevant form options.
  - Allow questions in the form to be added or updated, providing flexibility for evolving requirements.
  - Automatically create forms when a record enters a specified status, streamlining workflows and ensuring consistency.

- **Form Score**
  The 'Form Scores' section allows you to turn on or off the scoring feature for forms quickly.
  When enabled, this setting empowers you to capture and calculate scores based on the responses provided in the form.
  For example:
  - **Assessments:** Unleash your creativity using scores to evaluate employee performance, assigning points to different criteria.
  - **Quizzes:** Automatically calculate scores for educational quizzes based on correct answers.
  - **Customer Feedback:** Assign scores to different aspects of customer satisfaction surveys to quantify overall satisfaction.
  - **Risk Evaluations:** Score risk assessment forms to determine the level of risk associated with different activities or processes.
  - **Health Surveys:** Calculate health scores based on responses to lifestyle and health-related questions.

- **Color-Logic**
  The 'Color-Logic' section allows color coding for forms based on specific text results or scores.
  By setting different color zones, such as green, yellow, and red, you can visually indicate the status or category of responses.
  For example:
  - **Performance Reviews:** Use color coding to quickly identify employee performance levels, with green for excellent, yellow for satisfactory, and red for needs improvement.
  - **Customer Feedback:** Categorize feedback responses, with green for positive feedback, yellow for neutral, and red for negative.



3. Template Questions Definitions

- **ID**
  A unique ID is automatically set for each question.

- **Response Type**
  Specifies the type of answer expected for a question.

- **Linked Field**
  A parent record field linked to this question ensures that their values are kept in sync.
  For example, if the parent is customer feedback and the linked field is the customer status type, updating the status in the parent record will automatically update the status in the linked question field on the form.

- **Edit User Field**
  Specifies which user, identified in a user field or as a participant on the parent record, has permission to edit this question.

- **Weight**
  Defines the importance of this question in the overall score calculation. The weight determines how much this question contributes to the total score if weighted scoring is enabled.

- **Parent ID**
  This refers to the unique ID of the question on which this question depends. It identifies the "parent question," whose response determines whether this dependent question is displayed.

- **Parent Answer**
  Refers to the specific response required for the parent question to make this question visible. The dependent question will remain hidden if the parent question does not match this answer.