

## OVERVIEW

Smart forms are a great way to digitise your internal forms, such as formal reviews, commitment statements, learner surveys and many more.

There is the ability to allocate and capture required signatures from learners, assessor, employers and relevant external bodies.

## PREPARATION

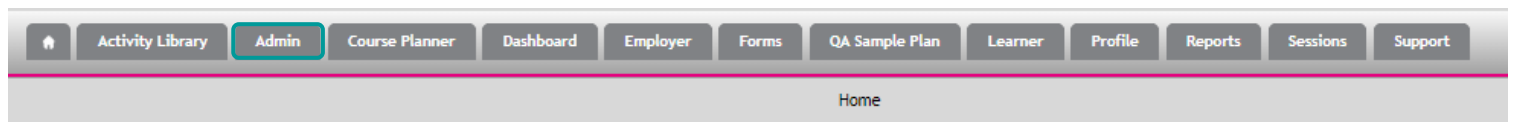
Using two screens can benefit the creation of forms, providing the ability to view two documents at the same time.

## USER RESTRICTIONS

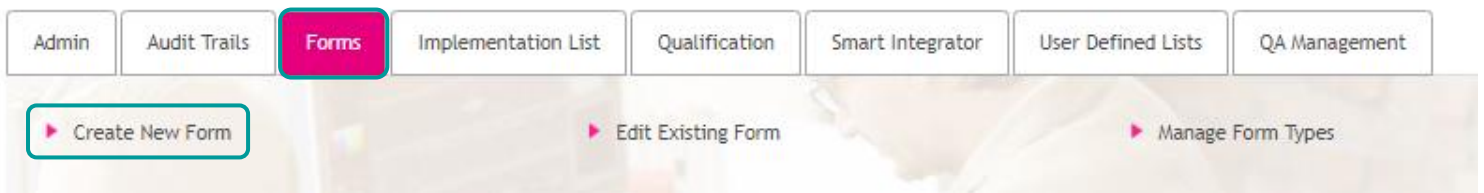
Master admin – only.

## DETAILS

1. Click Admin tab from grey navigation bar.



2. Click Forms tab, select Create New Form option.



3. Select create from blank or create from template.

Select the type of form you want to create:

Select Form Type ▼

Create Blank

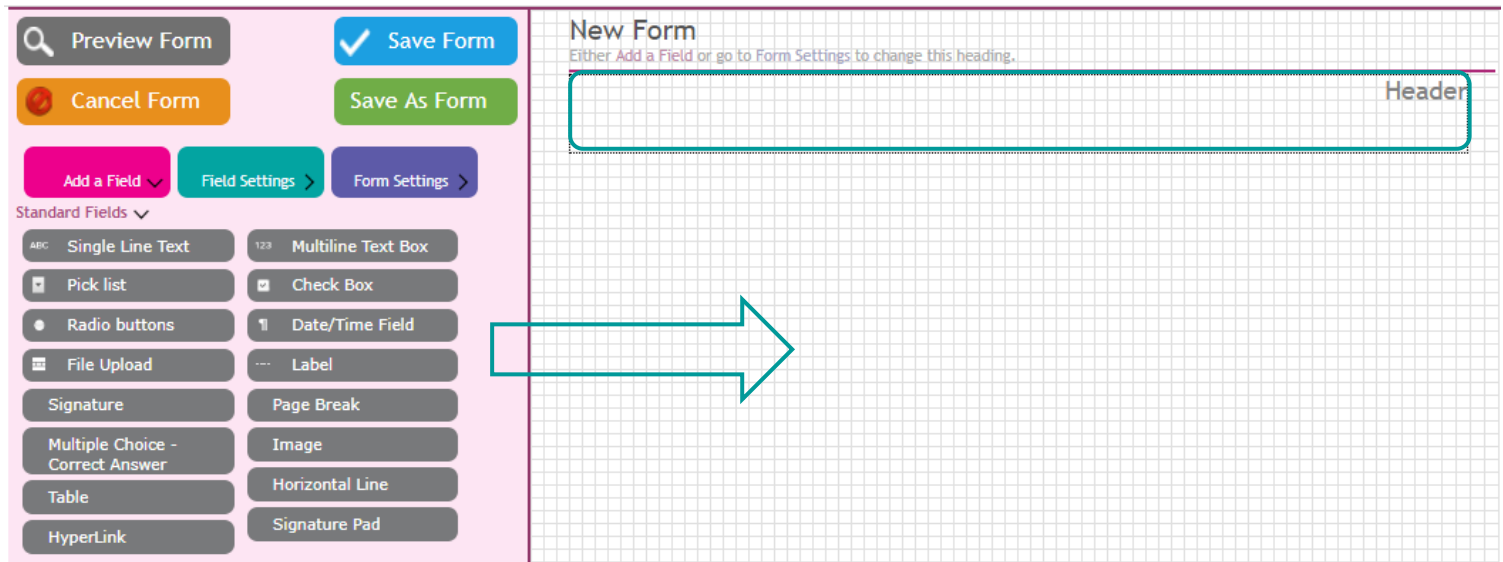
Select Template ▼

Create from Template

- Note\* Review or Enrolment forms needs to be classified as such.
- Form types supports accurate reporting on the differing form types.
- Bespoke form types, will display in the dropdown
- All templates can be fully edited meet bespoke requirements.

# CREATE A NEW FORM

- Once template or type has been selected the ability to create a form will be available. To add fields, drag and drop into the location to which they need to be displayed.
- From the Header or Footer zone the following options become available. For the Header or Footer zone drag the field into the header or footer then change the Field *settings* (*Note\* there isn't the option to add to footer or header from the main body of the form*)



- **Text boxes** provides a field that users can type into. **Multiline** option can be customised to size.
- **Pick list**, **check box** and **radio buttons** provide options to be selected.
- **File upload**- opportunity to attach files to the form.
- **Label**- opportunity to type free text that display on the form.
- **Signature** check box option accessed by entering username and password to sign form.
- **Page break** -opportunity to break the page where required. (*Note\* if you are going to do the PDF export you will need this*)
- **Multiple choice**- operates in a similar way as the check box option, also provides opportunity to self-mark.
- **Image** – must be a JPG.
- **Hyperlink**- add a link to websites.
- **Signature pad** – opportunity for a non-user of Smart Assessor to sign form.

- Pre-set fields for Learner, Assessor and Employer will draw the information in from Smart Assessor onto the form.

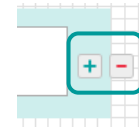
7. Adding a field will swap the field to settings tab.



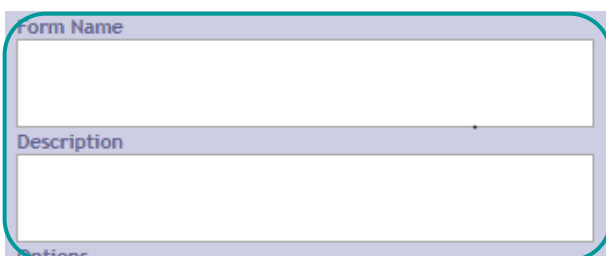
The screenshot shows the settings tab for a form field. The 'Field Label' is 'Untitled'. The 'Field Size' is set to 'Full Width'. The 'Location' is '438 X 185 Y'. The 'Max Chars' is '300'. The 'Options' include 'Mandatory' (unchecked). The 'Predefined Value' is empty. The 'Instructions for User' is empty. The 'Tab Order' is empty. The 'Device Display Order' is empty. The 'Field Name' is 'multilinetextbox\_2'.

- **Field label** -will display on top of the field
- **Custom size**- opportunity to adjust height and width.
- **Location** – opportunity to move and locate the field.
- **Max characters** – prevents going over the maximum character.
- **Mandatory box**- mandates all fields to be completed on the form (**Note\* form cannot be signed off until all fields have been filled in**)
- **Predefined value** -displays information recorded
- **Instructions for User**. Displays a float over box.
- **Tab Order** – operates left to right
- **Device Display Order** – opportunity to order each field 1<sup>st</sup> field number 1, 2<sup>nd</sup> field 2 and so on so forth.  
**(Note\* Tab and Device order need to be inputted if you are going to use the form Offline)**
- For further support on creating a form contact the Account Managers on [accountmanagers@SmartAssessor.co.uk](mailto:accountmanagers@SmartAssessor.co.uk)

8. To copy or delete a field next to each other, use the plus or minus option.  
**(Note\* The plus is to duplicate and the minus to delete)**



9. Select the form settings tab to name and provide a description prior to saving the form.



The screenshot shows the form settings tab with the 'Form Name' and 'Description' fields highlighted. The 'Form Name' field is empty. The 'Description' field is empty.

# CREATE A NEW FORM

Options  
 Offline  Online  Show grid  
 Disable fields shifting automation

Location to be assigned:      Access Rights:

<input type="checkbox"/> Learning & Assessment Plan	<input checked="" type="checkbox"/> Master Admin
<input type="checkbox"/> Evidence Library	<input checked="" type="checkbox"/> Basic Admin
<input type="checkbox"/> Learner Dashboard	<input checked="" type="checkbox"/> Assessor
<input type="checkbox"/> Assessor Dashboard	<input checked="" type="checkbox"/> IQA
<input type="checkbox"/> IQA Dashboard	<input checked="" type="checkbox"/> EQA
<input type="checkbox"/> Employer Dashboard	<input checked="" type="checkbox"/> Curriculum Manager
<input type="checkbox"/> Admin	<input checked="" type="checkbox"/> Employer Overview
<input type="checkbox"/> Resources	<input checked="" type="checkbox"/> Employer Manager
<input type="checkbox"/> Activities	<input checked="" type="checkbox"/> Partner
<input type="checkbox"/> IQA Sampling	<input checked="" type="checkbox"/> Custom Manager
	<input checked="" type="checkbox"/> Learner

Mandatory Pages:  
 Display Only Mandatory Pages

Completion:  
 Enable Complete Function

<input type="checkbox"/> Assessor	<input type="checkbox"/> Basic Admin
<input type="checkbox"/> Curriculum Manager	<input type="checkbox"/> Custom Manger
<input type="checkbox"/> Employer Manager	<input type="checkbox"/> Employer Overview
<input type="checkbox"/> EQA	<input type="checkbox"/> IQA
<input type="checkbox"/> Learner	<input type="checkbox"/> Master Admin
<input type="checkbox"/> Partner	<input type="checkbox"/> Other

Signature:  
 Set Request Signature

Emails:

<input type="checkbox"/> Assessor	<input type="checkbox"/> Basic Admin
<input type="checkbox"/> Employer Manager	<input type="checkbox"/> Employer Overview
<input type="checkbox"/> IQA	<input type="checkbox"/> Learner

- **Offline and online option** – allows the form to be used on apps
- **Location** – is where the form can be accessed
- **Access rights**- if a role is un-ticked, that user will not be able to see or use the form
- **Completion**- who can complete the form
- **Request Signature** – provides opportunity to send out an email asking someone to sign the form
- **Emails**- can be sent out once the form is completed.

10. For more support please contact Account Managers [accountmanagers@SmartAssessor.co.uk](mailto:accountmanagers@SmartAssessor.co.uk)