



Centre Manager Basics

How to create a custom form

Creating Forms

You can create your own Forms to capture additional learner data.

Once you have created a Form, you can specify where the Form should appear within the learner portfolio.

You can also make data persist for Forms published inside Assessment Plans & Reviews (carry data over into the next plan/review).

Preparation

Speak to your Customer Success Manager if you would like to use Forms, but can't see the "Forms" icon.

User Restrictions

Only Centre Managers with permission to "Design and assign Forms" can create forms.

Creating a Form

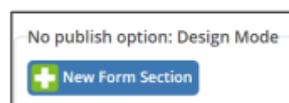
To create a new form, follow the steps below:

1. Click on the **Forms** icon, which can be found under **Centre**
2. Click the **Create New Form** button
3. Enter the Form name
4. Click the **Create** button

Designing a Form

Each form is made up of sections and fields. You will need a section before you can create a field. To add a new section, follow the steps below:

1. Click the **New Form Section** button
2. Enter the Section name
3. Click the **Save** button



*Note – Choosing the **Hide panel** option to display the fields without a section border.*

Once you have created a section, click on the icon of the field type you'd like to add from the **Options** area.



Each type of field requires different information to be entered. For example, when you select a multiplechoice field, you must then specify which values are going to appear in the multiple-choice field.

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The following table explains what type of field each icon represents:

Icon	Name	Description
	Single-line text	One line of text that doesn't increase in size
	Multi-line text	Several lines of text that automatically increase in size
	Date Picker	Select a date from a calendar
	Multiple Choice	Options that are presented as checkboxes, drop-down lists or radio-buttons
	Checkbox	A single check box with a statement
	Data table	A table of data with customisable column headings & field types
	Attachments	Attach documents or web links
	Label	HTML enabled read-only text

Important

Before deleting sections & fields that contain live data, you will be warned that all data will be lost and will be irretrievable.

Live data consists of any information that has been entered into any field on each individual learner portfolio.

Publishing a Form

When you have finished designing the Form, you will need to publish. It is at this point where you specify where the Form will be located within the learner portfolio – known as the “publish option”.

To publish the Form and select the publish option, click on the **Publish:Off** button in the top right corner of the Form. You can now decide where the Form should be published to.



Publish Option	Form can be completed by	Description
Learner Tab	Centre Manager User Manager	The form will be displayed as a tab on the learner's portfolio and will only be visible to Centre Managers and User Managers
Learner Portfolio	Learner Employer Tutor/Mentor Centre Manager Learner & Tutor/Mentor	The form will be displayed as a portfolio icon, which is visible to all users who can access the learner's portfolio
Assessment Plan	Tutor/Mentor	The form will be displayed in the learner's assessment plan, if assigned to the learner when the plan is created
Learner Review	Tutor/Mentor Learner Employer	The form will be displayed in the learner's review, if assigned to the learner when the review is started
Assessor Observation	IQA	Used when an IQA observes the Tutor/Mentor
Learner Interview	IQA	Used when an IQA interviews a Learner
Learner Template	Learner Tutor/Mentor Class Form Delegate Centre Manager	The form can be filled out and signed multiple times for the same learner. Only the first person to sign can complete the fields

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