



**EmployeeConnect**  
*Work. Flow. Smarter.*

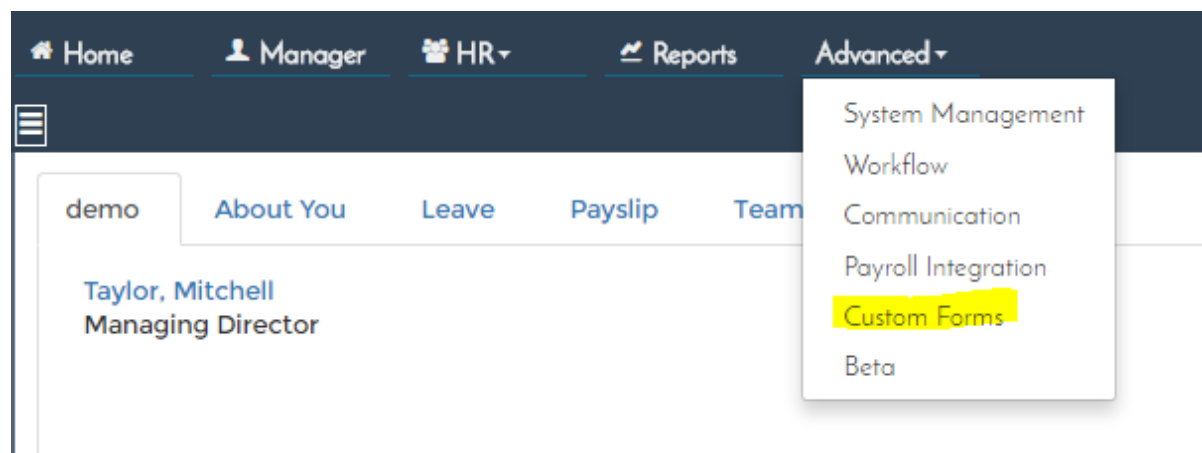
# Custom Forms Manual

---

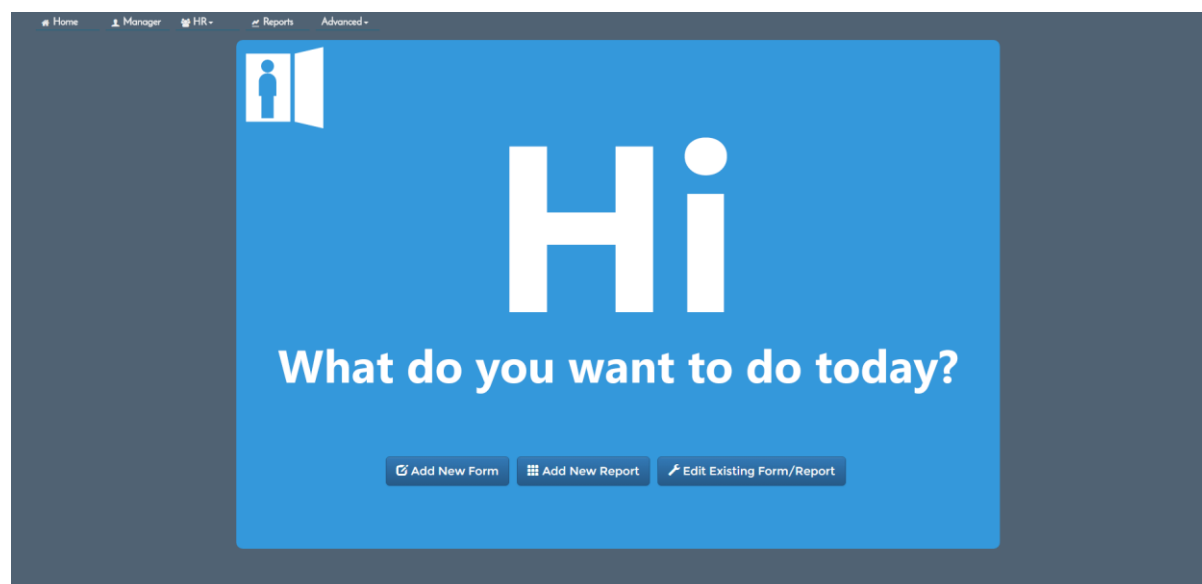
A manual designed to help individuals use the Custom Forms

## Custom Forms

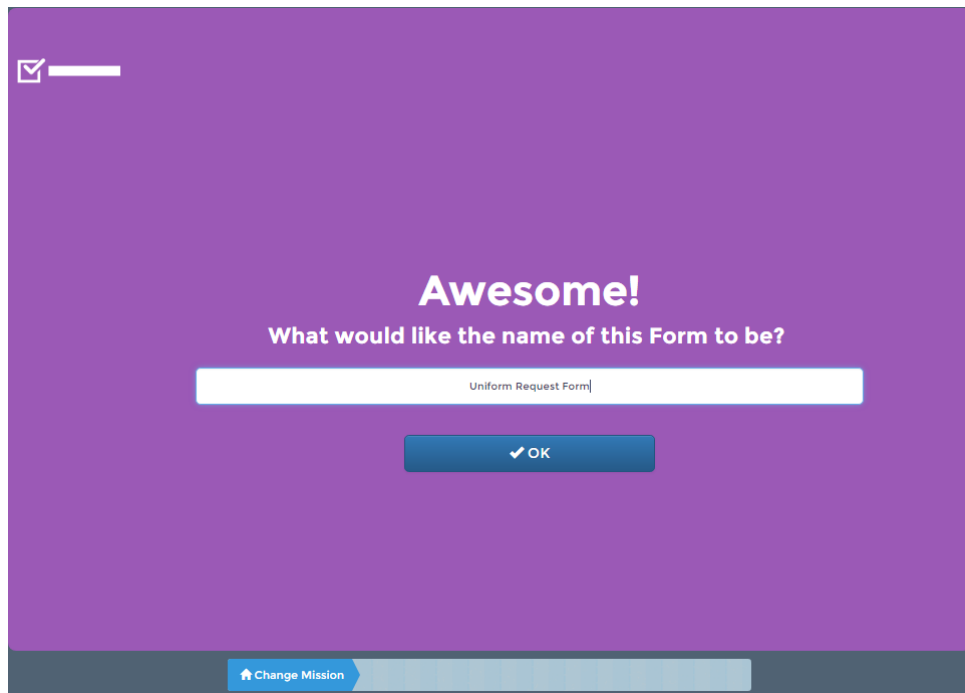
The Custom Forms are accessed from the Advanced Menu.



It is important to have planned your form and the data you wish to capture before starting as editing the form after creating a report based on the form and captured data will not be successful.



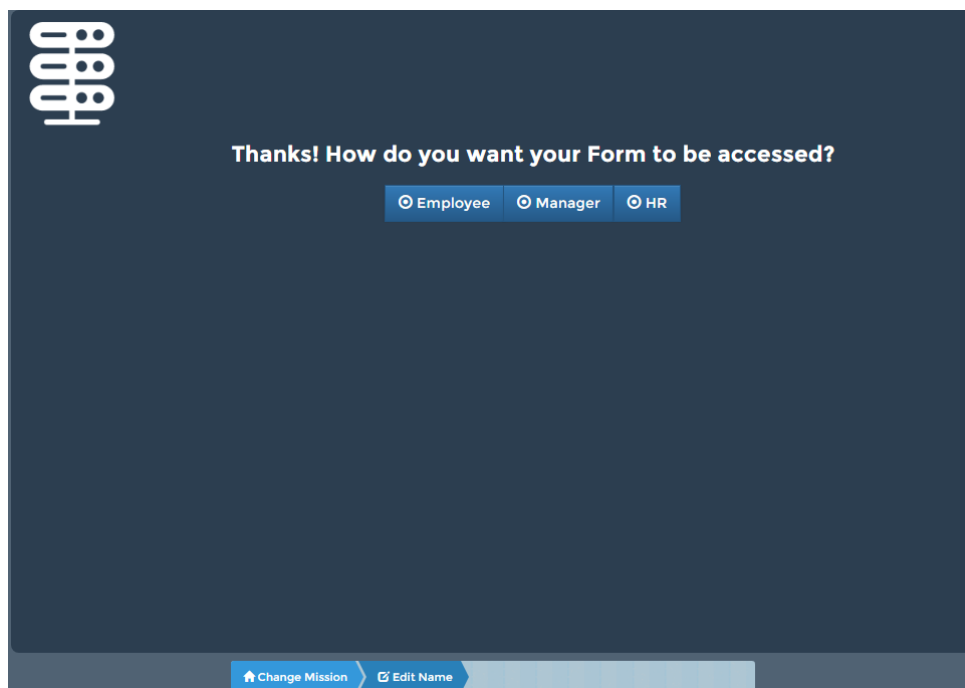
Click on Add New Form link.



A screenshot of a web interface with a purple background. In the top left corner, there is a white checkmark icon next to a horizontal line. The main text in the center reads "Awesome!" in a large, bold, white font. Below this, a smaller white font asks "What would like the name of this Form to be?". A white text input field contains the text "Uniform Request Form". Below the input field is a blue button with a white checkmark and the text "OK". At the bottom of the screen, there is a dark blue navigation bar with a light blue arrow pointing right and the text "Change Mission".

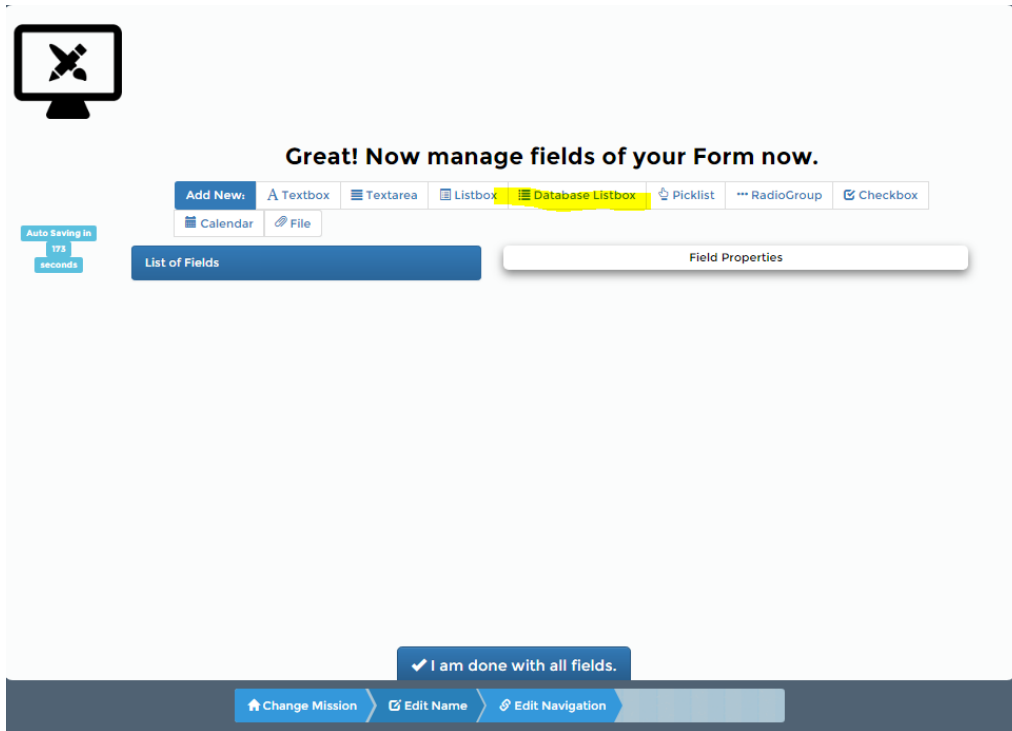
Give your form a meaningful name – for example let's create a Uniform Order form for Managers to request uniforms for their employees.

After adding the name, click on OK.



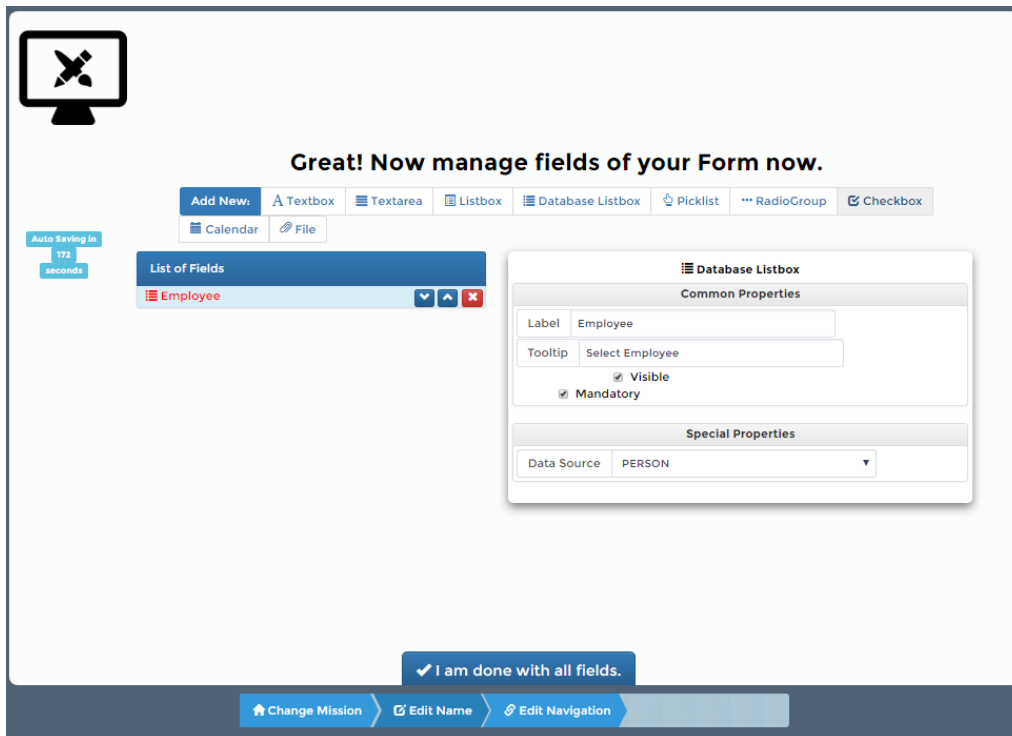
A screenshot of a web interface with a dark blue background. In the top left corner, there is a white logo consisting of the letters "ECC" stacked vertically. The main text in the center reads "Thanks! How do you want your Form to be accessed?". Below this text are three blue buttons with white text: "Employee", "Manager", and "HR". At the bottom of the screen, there is a dark blue navigation bar with a light blue arrow pointing right and the text "Change Mission", followed by a light blue arrow pointing right and the text "Edit Name".

Next you will need to determine who will be able to access the form. In this example, we will nominate managers to complete the form by clicking on the Manager button.

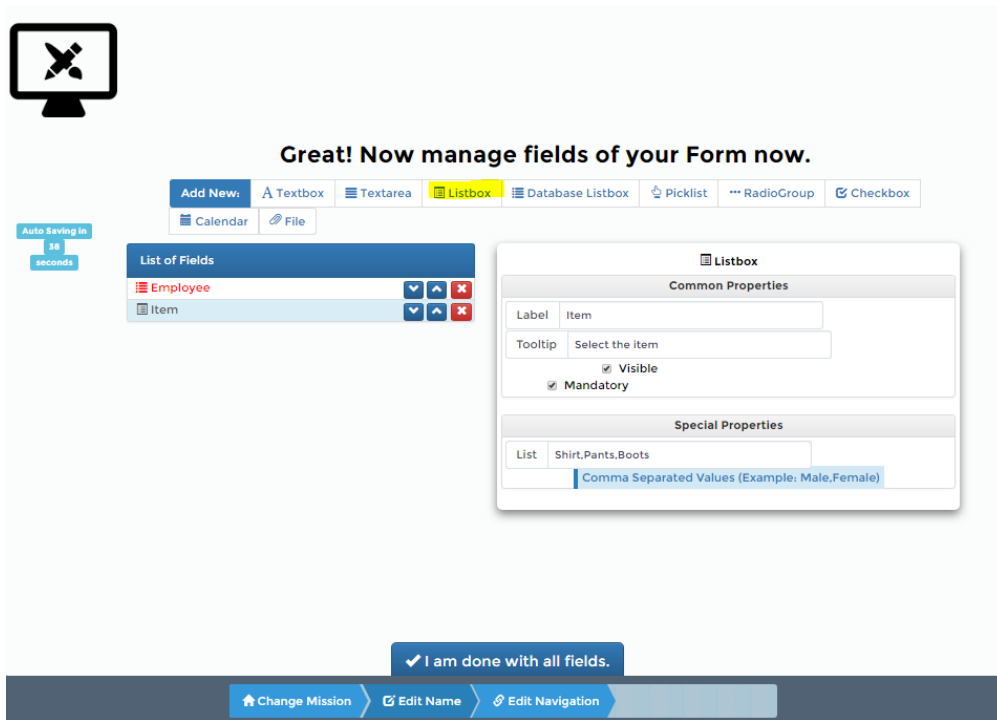


We can now create /select the items we want to include on the form. We will start with the employee's name.

Click on the Database Listbox to create the first field on the form.

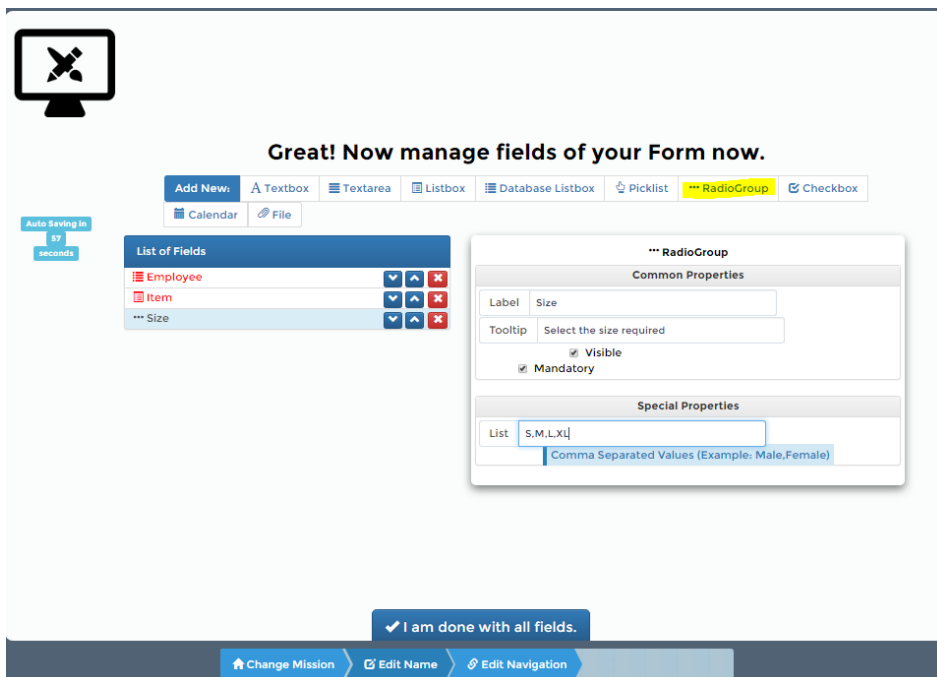


Enter the label you wish to use, add tooltip text, make the field mandatory and then select PERSON from the data source list. This will display a list of all the records in the PERSON table.



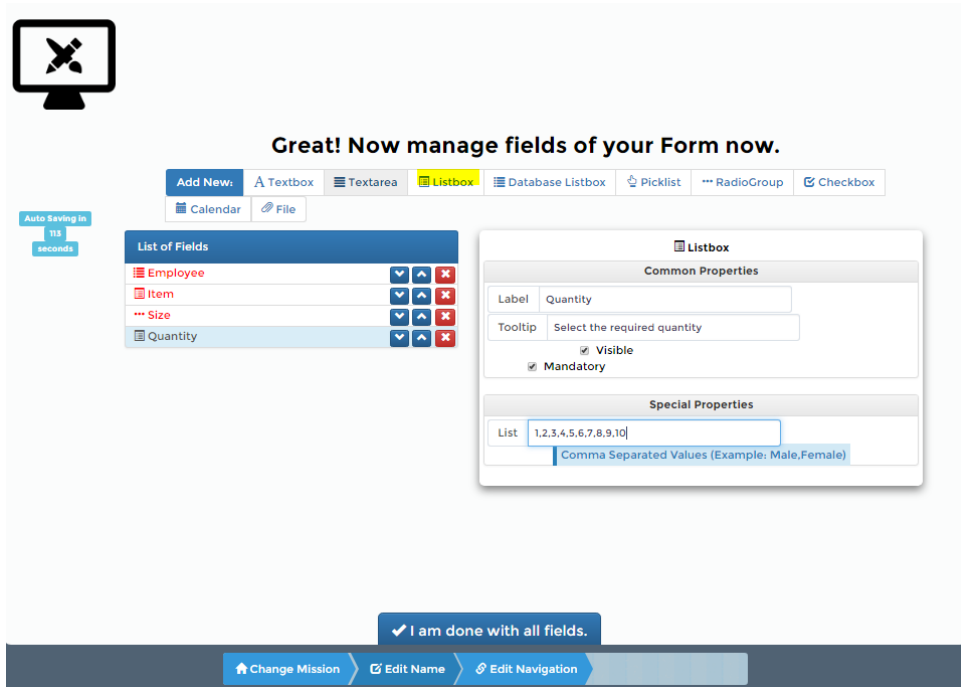
Add the second data field by clicking on the Listbox link.

Enter the label you wish to use, add tooltip text, make the field mandatory and then add the required values as a comma separated list.



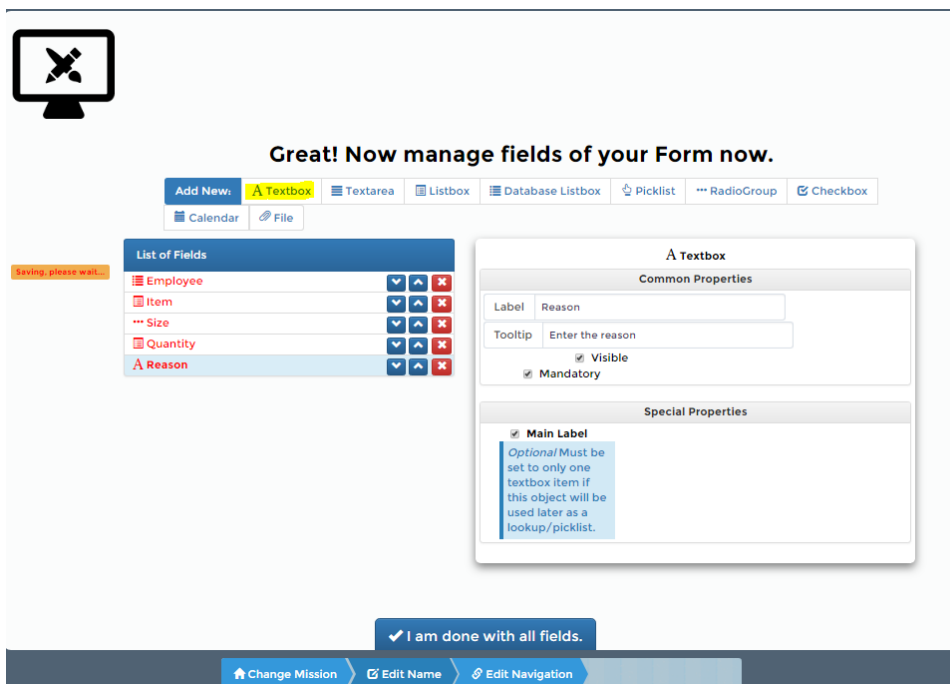
Add the third data field by clicking on the RadioGroup link.

Enter the label you wish to use, add tooltip text, make the field mandatory and then add the required values as a comma separated list.



Add the fourth data field by clicking on the List link.

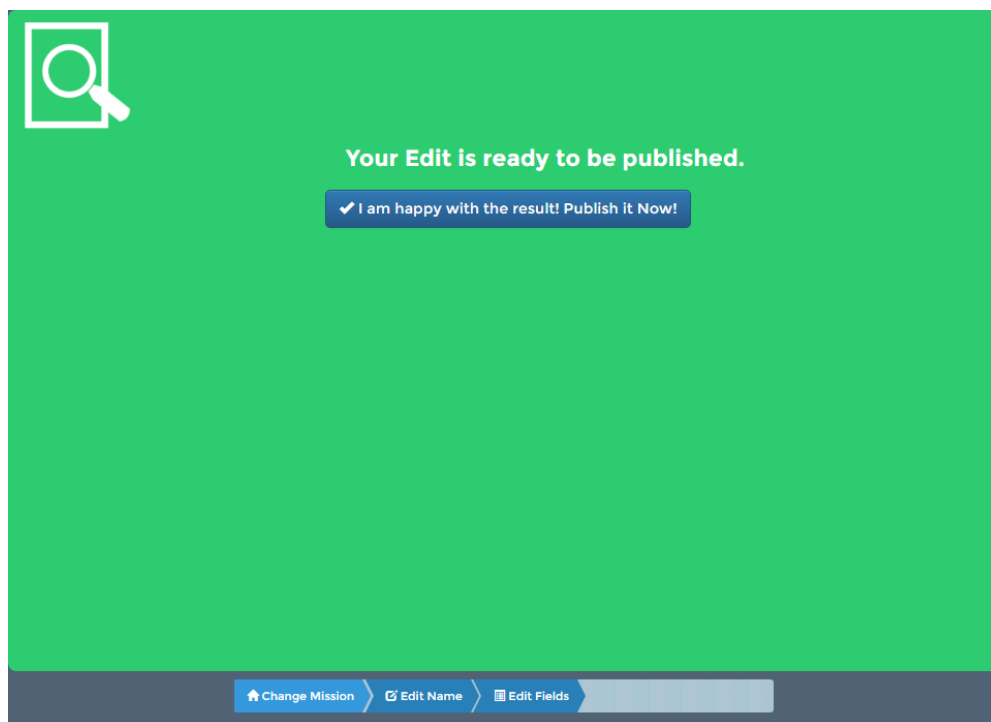
Enter the label you wish to use, add tooltip text, make the field mandatory and then add the required values as a comma separated list.



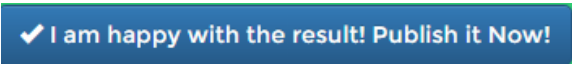
Add a final data field by clicking on the Textbox link.

Enter the label you wish to use, add tooltip text, make the field mandatory.

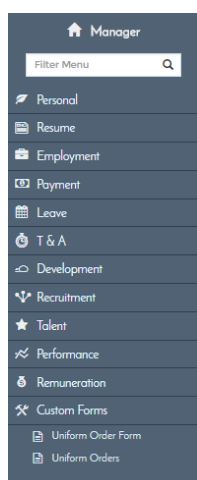
Having completed our form design, we now click on the  button.



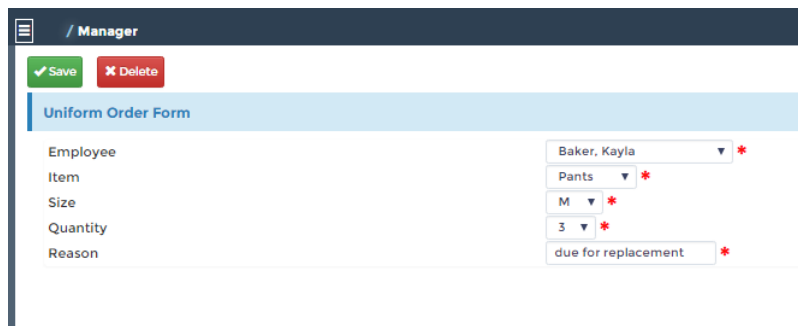
Please confirm you have finished by clicking on the

 button.

Once the form has been published it will be available on the Manager's Menu in the Custom Forms section



Here is the example form with the entered data.

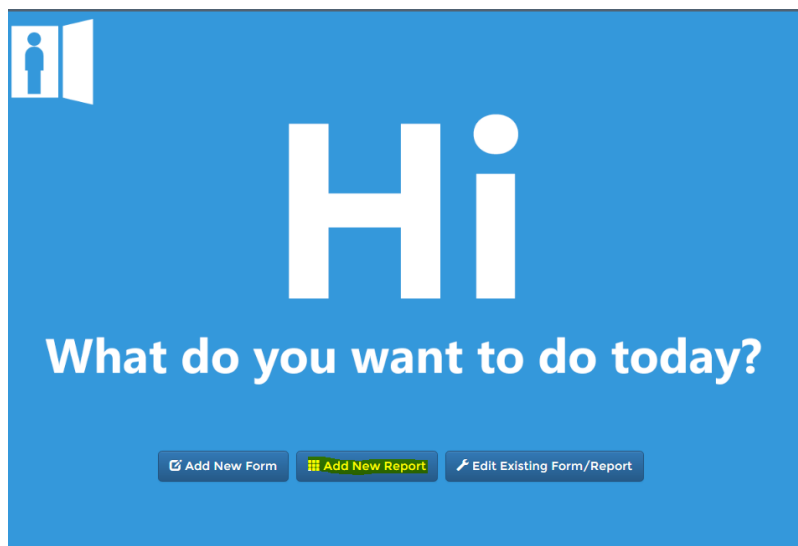


The screenshot shows a web interface for a 'Manager' with a dark header. Below the header are two buttons: a green 'Save' button with a checkmark and a red 'Delete' button with an 'X'. The main content area is titled 'Uniform Order Form' in a light blue bar. Below this, there are five input fields, each with a red asterisk indicating a required field:

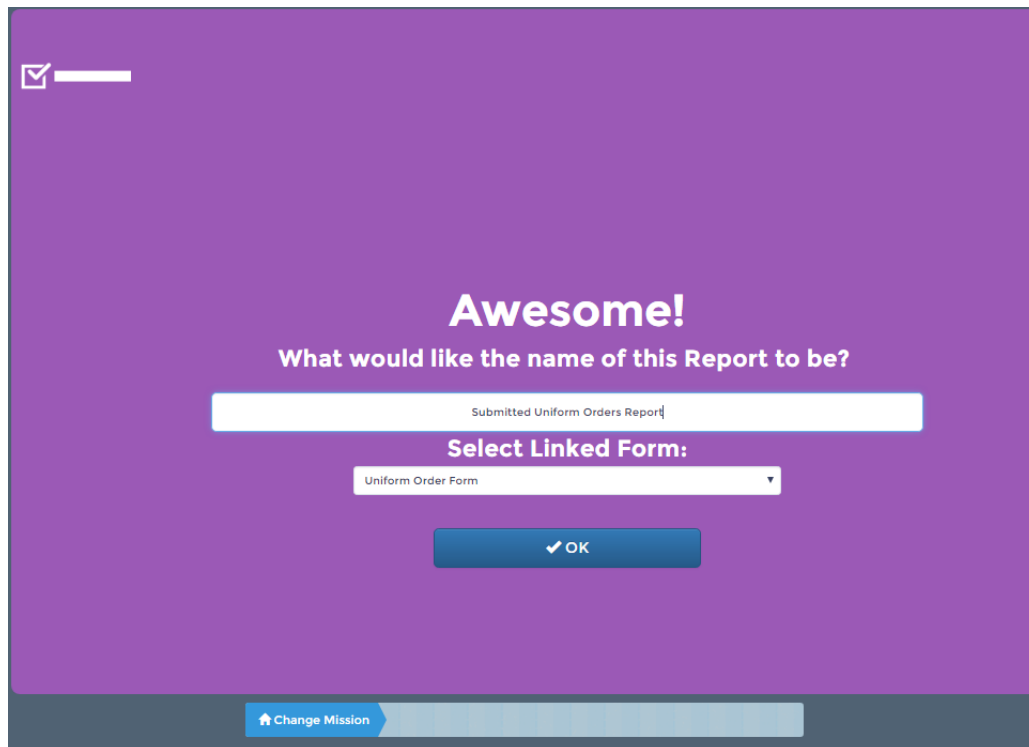
- Employee: Baker, Kayla
- Item: Pants
- Size: M
- Quantity: 3
- Reason: due for replacement

The next step will be to create a report for Managers to display all their entered Order forms.

Go back to Advanced>Custom forms and click on the Add New Report Link



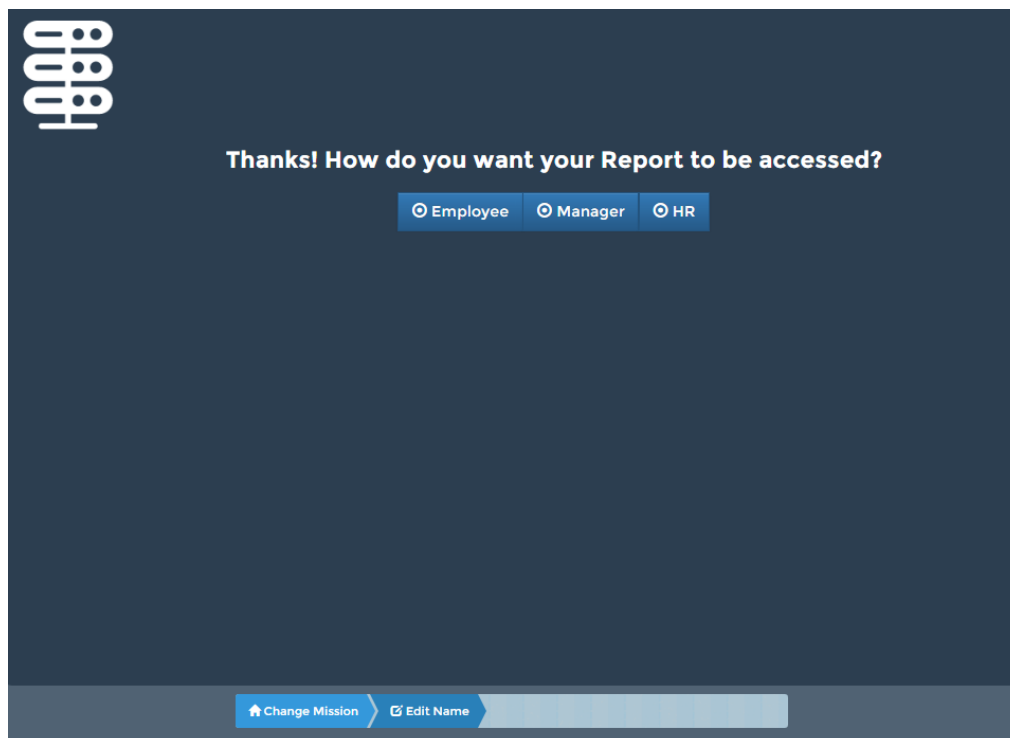




A screenshot of a web form with a purple background. In the top left corner, there is a white checkmark icon next to a horizontal line. The main heading is "Awesome!" in large white font. Below it, the question "What would like the name of this Report to be?" is displayed. A white text input field contains the text "Submitted Uniform Orders Report". Below the input field, the text "Select Linked Form:" is shown. A white dropdown menu is open, showing "Uniform Order Form" with a downward arrow. At the bottom center, there is a blue button with a white checkmark and the text "OK". At the bottom left, there is a blue button with a white house icon and the text "Change Mission".

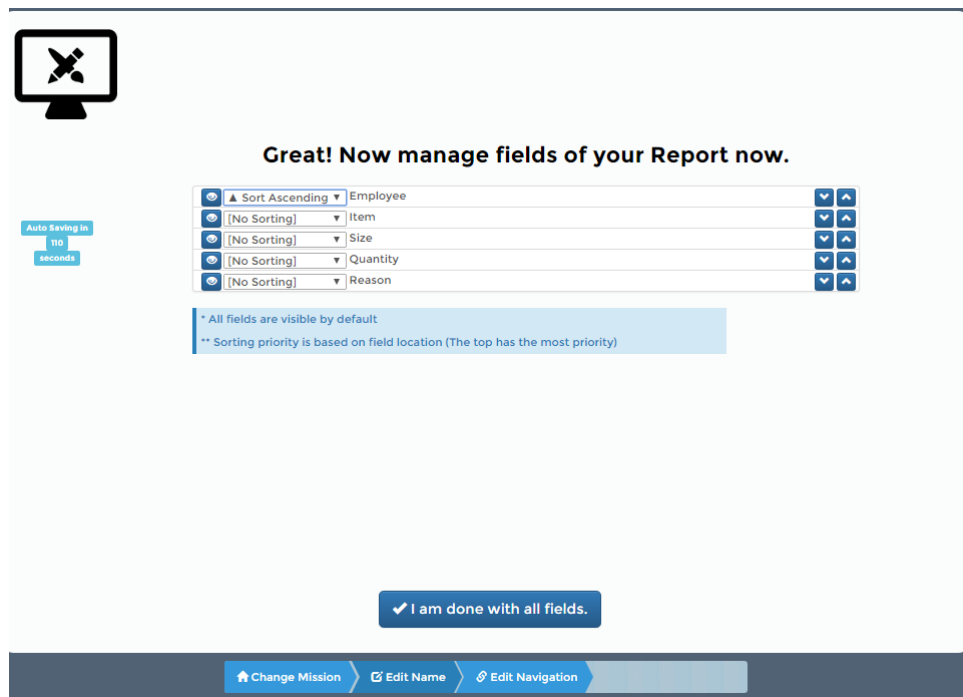
Enter an appropriate name and then select the form we created.

After Clicking OK, you will need to determine you can see the report. For consistency in our example, please select Manager again.



A screenshot of a web form with a dark blue background. In the top left corner, there is a white logo consisting of the letters "ECC" stacked vertically. The main heading is "Thanks! How do you want your Report to be accessed?" in white font. Below the heading, there are three radio button options: "Employee", "Manager", and "HR", each in a blue box. At the bottom left, there is a blue button with a white house icon and the text "Change Mission". To its right is another blue button with a white edit icon and the text "Edit Name".

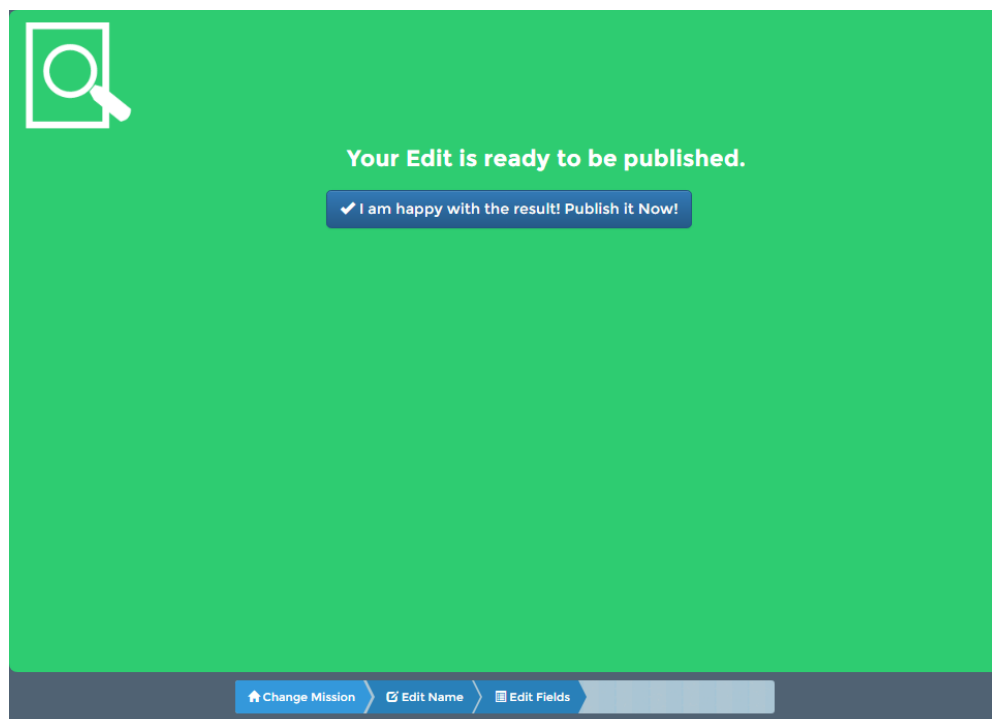
We can now change the sort order if required.



For our example, please change the Employee column to Sort Ascending thereby listing employees in alphabetical order.

Now click on the **I am done with all fields.** button.

Having completed our report design, we now click on the **I am done with all fields.** button.

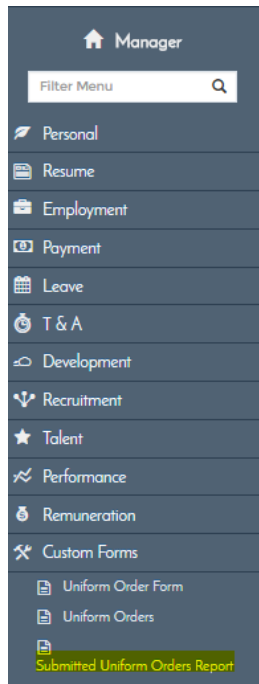


Please confirm you have finished by clicking on the

button.

button.

Once the report has been published it will be available on the Manager's Menu in the Custom Forms section



Here is the example report based on the data we entered in the form.

The screenshot shows a table titled 'Submitted Uniform Orders Report'. The table has columns for 'Employee', 'Item', 'Size', 'Quantity', and 'Reason'. There are three rows of data. The first row shows Alison Prato with 3 pairs of pants (size M) and the reason 'I lost them'. The second row shows Amodeo Daniel with 2 shirts (size XL). The third row shows Bangnato Tony with 3 pairs of pants (size L). The table includes search, clear, and advanced filters, and a download to Excel option. A status bar at the bottom indicates 'Rows 1 to 3 of 3'.

| Edit              | Employee      | Item  | Size | Quantity | Reason      |
|-------------------|---------------|-------|------|----------|-------------|
| <a href="#">➔</a> | Alison Prato  | Pants | M    | 3        | I lost them |
| <a href="#">➔</a> | Amodeo Daniel | Shirt | XL   | 2        |             |
| <a href="#">➔</a> | Bangnato Tony | Pants | L    | 3        |             |

We have now created a custom form, entered data and produced a report based on the data.

There are additional data field types available that can be used other than those used in our example, such as Checkbox, calendar & file attachment.

