aptem.

Custom Questionnaire – file upload

Version 1.0

Contents

Introduction

Within a custom questionnaire step of an onboarding wizard, it is now possible to ask users to upload a file against a question. This is particularly helpful if you want to capture documents or evidence such as a CV. It is also possible to add multiple file upload questions within a single custom form and control whether these are optional or mandatory.
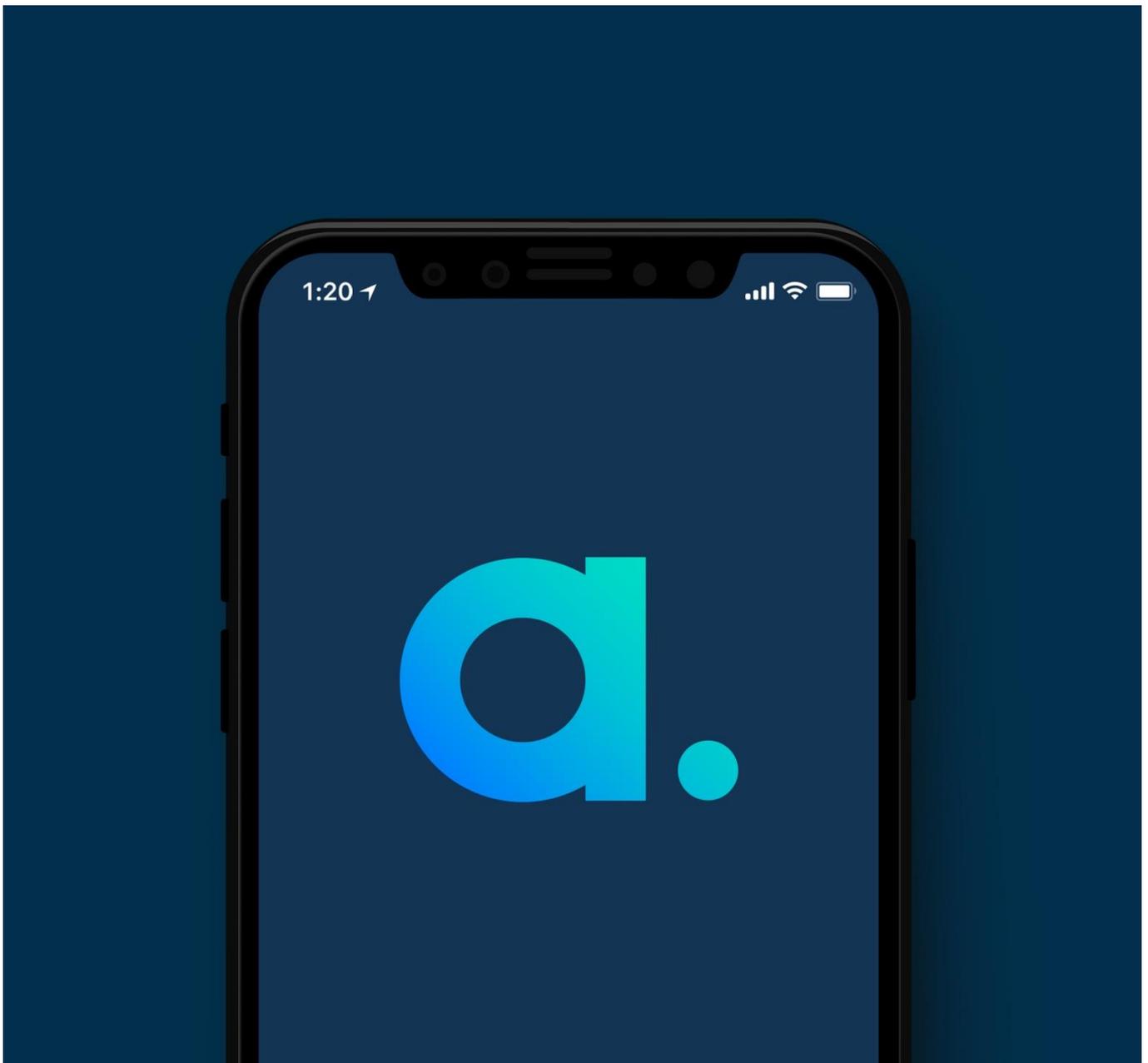
Add file uploads to a Custom Questionnaire step of an Onboarding Wizard

Configure your Custom Questionnaire Onboarding Wizard

1. Open the navigation by clicking the *Tiles* menu selector:
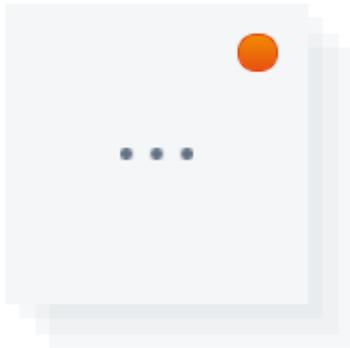
2. Navigate to the *Programmes* section by selecting the *Programmes* tile:

3. Using the *Programmes* grid and search option, identify the programme that you wish to configure:

Programmes

Name:		See archived: ☐	Tags:		Search	Reset

Name ↑	Users	Clone	Edit	Delete/Archive
Account programme for ABC Training	6	📄	✏️	
Auto generated account programme for ABC Training				
Customer Service Practitioner Level 2	9	📄	✏️	
Functional Skills - English 3 Months - Level 2	0	📄	✏️	Archive
Functional Skills - English 6 Months - Level 2	1	📄	✏️	
Functional Skills - English 9 Months - Level 1+2	0	📄	✏️	✕

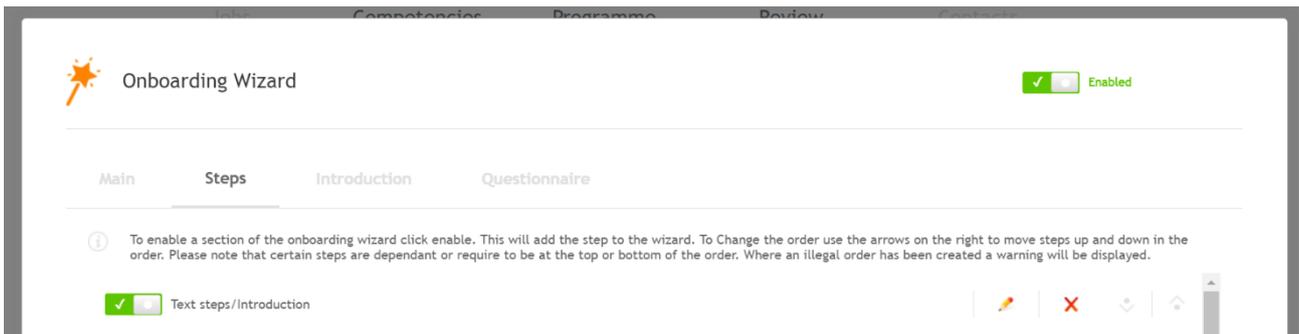4. Edit the programme that you want to amend by clicking the *Edit* option. Click this:

5. From the *Programme Builder* screen, click the *Onboarding Wizard* menu option to launch the *Onboarding Wizard* modal.

Onboarding
Wizard

6. Navigate to the second tab of the *Onboarding Wizard* modal called *Steps*.

7. This screen shows you the steps you have within your *Onboarding Wizard*. From here you can identify which of the steps are "Custom Questionnaire" steps. A "Custom Questionnaire" step allows you to add a custom form to capture additional information from users.

8. For each step in the *Onboarding Wizard* you can define your own step name which will display to the user. This is shown after the name of the step. For example, the image below shows where a Custom Questionnaire step has been added and a display name of "Questionnaire" set which will be the step name that the user is presented with.

9. For each *Custom Questionnaire* step, you will have a corresponding tab in the top navigation to the right of the *Steps* tab (see image below). Navigate to this tab to manage the custom fields that are captured in this step of the *Onboarding Wizard*.

10. The Custom Questionnaire tab will show all fields that have been added to the form. Click the link *Add more* to add further fields.

11. When you click *Add more* you will be presented with the following view where you have the option to select what type of information you want to capture.

12. From the drop down, select the option *Title & Description*.

13. The form will update to show the *Title* field and the ability to flag whether a file upload is required or optional.

| Title | File upload ▼ | Optio... ▼ |

14. Click the *Confirm* button on the *Onboarding Wizard* window to save your changes.

15. Click the *Confirm* button on the *Programme Builder* window to save your changes.