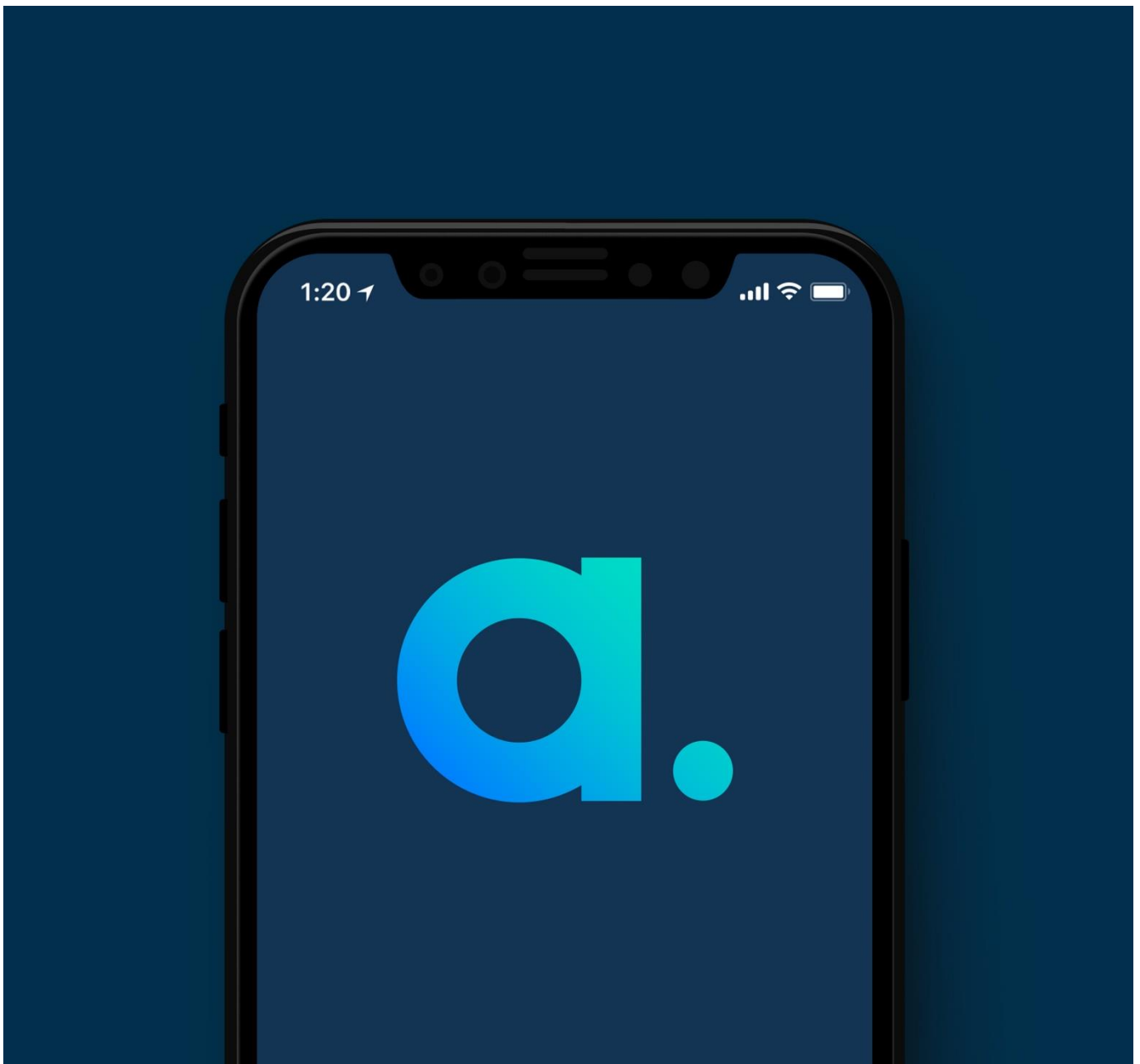




# Custom Questionnaire step – Title & Description

Version 1.0



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## Introduction

To help an applicant or learner understand and complete custom form information, we have added the ability for you to structure your forms within the *Onboarding Wizard* by adding subheadings. You can also add a text description below these sub-headings to provide a descriptive introduction to that part of the form.

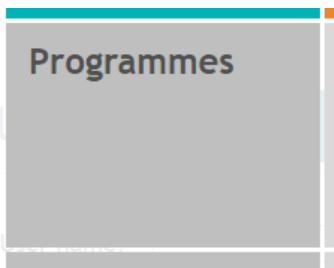
# Add subheadings to a Custom Questionnaire step of an Onboarding Wizard

## 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 wish to amend by clicking the *Edit* option. Click this:

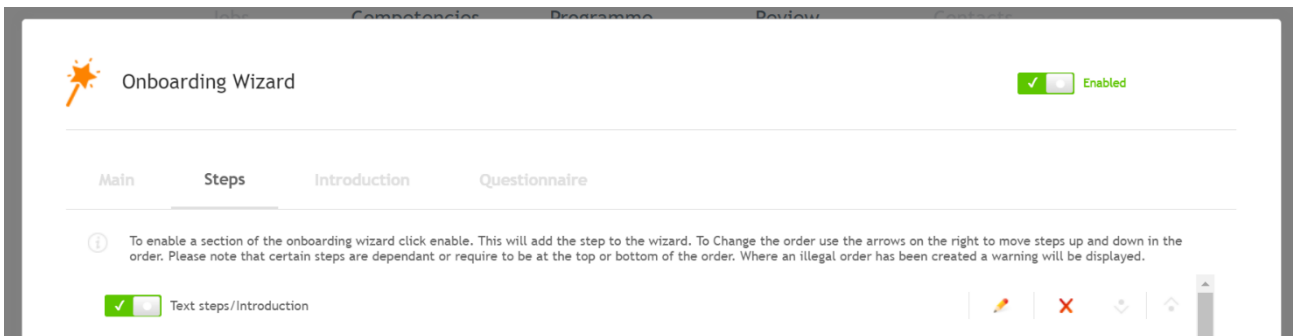


5. From the *Programme Builder* screen, click the *Onboarding Wizard* menu option to launch the *Onboarding Wizard* modal.



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 illustration below). Navigate to this tab to manage the custom fields that are captured in this step of the *Onboarding Wizard*.



## Onboarding Wizard

Main

Steps

Introduction

Questionnaire



To enable a section of the onboarding wizard click enable. This will add the step to the wizard order. Please note that certain steps are dependant or require to be at the top or bottom

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

 **Add more**

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.

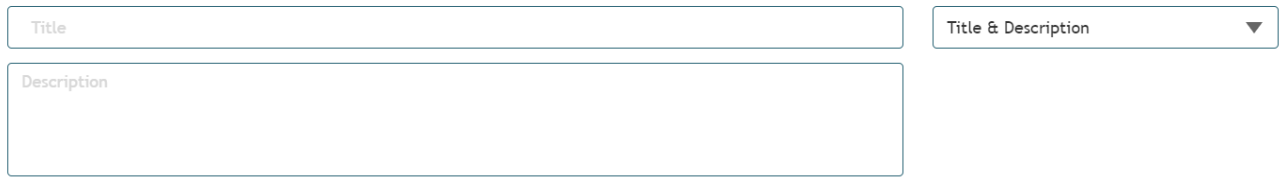
  

 **Add more**

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

- Text
- Boolean
- Numeric
- Date
- List item
- Boolean with case block
- Email
- Phone number
- Post code and Address
- Title & Description
- File upload

- 
13. The form will update to show *Title & Description* fields. The *Title* field is your form subheading - this is a mandatory field. The *Description* field can be used for some introductory text to accompany the subheading - this is an optional field.



The image shows a form with three input fields. The top field is a text box labeled 'Title'. Below it is a larger text box labeled 'Description'. To the right of these fields is a dropdown menu with the text 'Title & Description' and a downward-pointing arrow.

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.