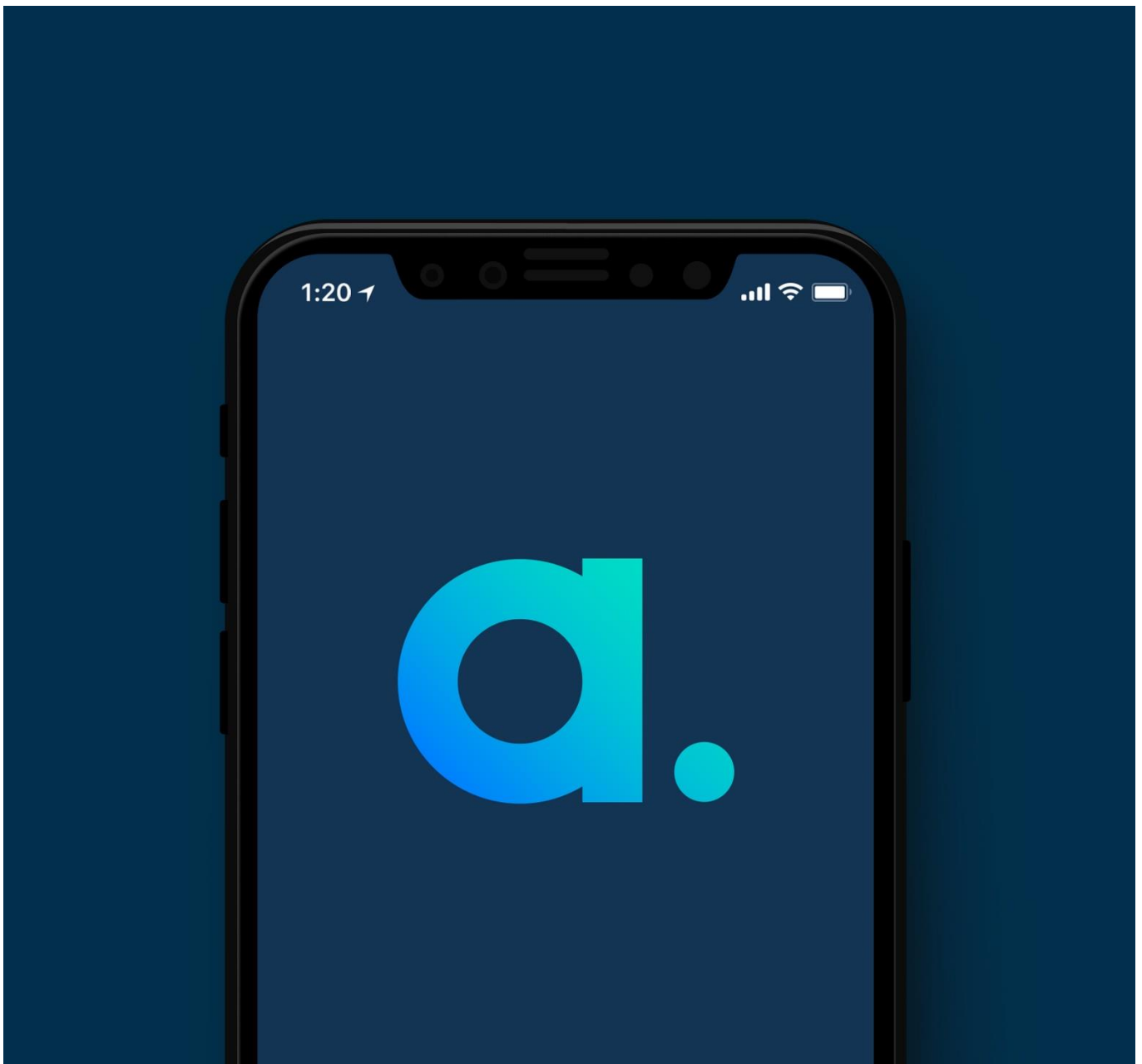




Onboarding Wizard – multiple Custom Questionnaire steps

Version 1.0



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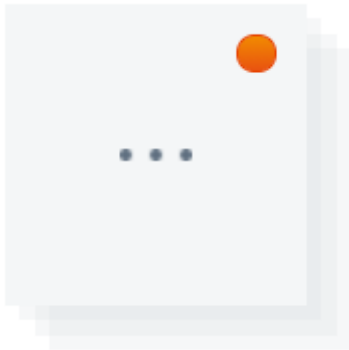
Introduction

Aptem clients each have their own unique process for onboarding and enrolling users. To help you follow your operating model, we have extended the use of custom forms. You can now add as many custom forms to a single *Onboarding Wizard* as you like. This allows you to break down the information captured into manageable sets for the user to understand and populate, avoiding the need for an excessively large form. This is an extremely practical addition that greatly improves the user experience for onboarding and enrolment.

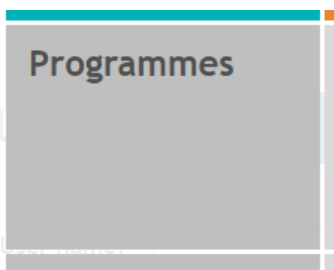
Add subheadings to a Custom Questionnaire step of an Onboarding Wizard

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:

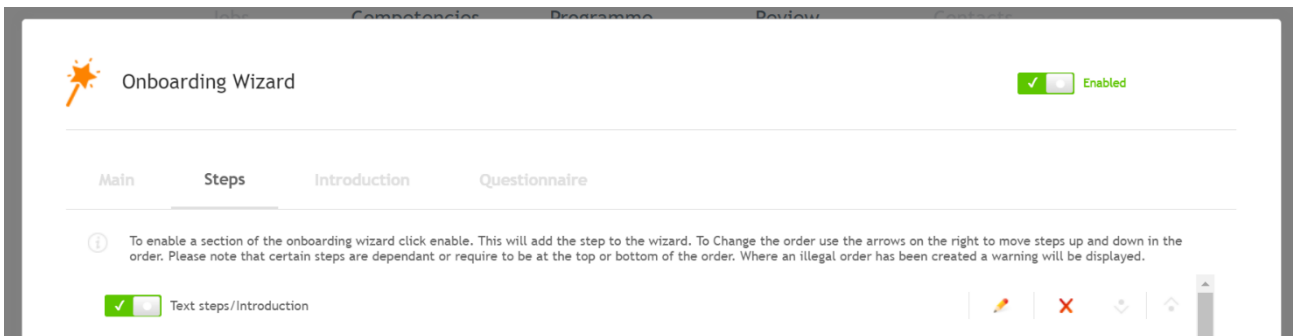


5. From the *Programme Builder* screen, click the *Onboarding Wizard* menu option to launch the *Onboarding Wizard* modal.



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. You can add additional *Custom Questionnaire* steps by navigating to the bottom of the *Steps* tab and clicking *Add Custom Questionnaire*.

Add Custom Questionnaire

10. This will add a new step to the bottom of the list of steps. You can move the steps up and down to determine the presented order of the steps using the arrows controls on the right-hand side of each step.



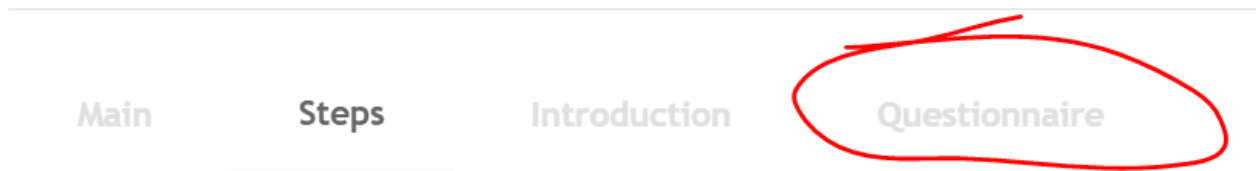
11. Click the pencil icon to edit the display name of the step.



12. 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



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

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