

# EW Assist

## Form Components – Layouts and uses – An Admin guide

Your Performance review forms are made up of a number of components which determine the layout of each element or question. In some cases they also have different uses which we will discuss here.

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**IMPORTANT:** The bolded name at the top of each component is where the question or statement would normally be. In the case of this guide this text has been replaced with the name of the component itself.

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### Score Summary Component

**Total/Section Summary Results**

**Total/Section Summary Results** provides a place for the score to be totalled for the whole form or just a section of the form. Every form should start with this component with the 'Section Num' as TOTAL. Subsequent scored components OR Total/Section Summary Results should have TOTAL to be included in this total score. The scoring can be further broken down by following this type of approach:

| Component                            | Section Num | Section Summary To Section Num |
|--------------------------------------|-------------|--------------------------------|
| <b>Total/Section Summary Results</b> | TOTAL       |                                |
| <b>Total/Section Summary Results</b> | SECTION 1   | TOTAL                          |
| Question 1a                          |             | SECTION 1                      |
| Question 1b                          |             | SECTION 1                      |
| <b>Total/Section Summary Results</b> | SECTION 2   | TOTAL                          |
| Question 2a                          |             | SECTION 2                      |
| Question 2b                          |             | SECTION 2                      |

In this way a total score for the whole form can be calculated and section scores (such as Personal Attributes and Job Specific Competencies) as well as individual scores per question/statement.

## Text Only Component

Just Shows Text  
**Header 1**  
**Header 2**  
 Paragraph  
 br - line break **bold** underline /i*italic*  
 Numbered list 1,2,3  
 Bulleted list

**Just Shows Text** provides a way to add text for the purpose of adding a title, paragraph or instructions etc. The text can be formatted by adding special hash tags. The above text would be written like this in the 'Display Text' box:

```
#b#Just Shows Text#/b##br#
#h1#Header 1#/h1#
#h2#Header 2#/h2#
#p#Paragraph#/p#
#br#br - line break #b#bold#/b# #u#underline#/u# #i#italic#/i#
#ol##li#Numbered list 1,2,3#/li##/ol#
#ul##li#Bulleled list#/li##/ul#
```

## Comment Capture Components

Comment Capture (80x10) Below any Text

Comment Capture (80x3) Below any Text

**Comment Capture** allows questions to be answered in just free text boxes. Different sizes are available to visually encourage a concise answer or a more verbose one.

## Preset answers for specific questions

Have completed Tasks Vert - Set Text for Cmp

- No comment to date
- Started chasing up
- All are now complete

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Have completed Tasks Vert - Set Text for Emp

- No comment to date
- I have not yet completed the above tasks, or have not discussed them with my line manager
- I have completed the above tasks and discussed them with my line manager

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Met with Manager - Set text for Emp

- No Comment to date
- I have not met with my manager to discuss this evaluation
- I have met with my manager to discuss this evaluation

## Standard Questions and Answer formats

|   |  |
|---|--|
| <b>Horiz 5-1 Inc Short Words Measure After Client Text + Postline Comment (80x5)</b><br><input type="radio"/> EX - 5 <input type="radio"/> EE - 4 <input type="radio"/> ME - 3 <input type="radio"/> BE - 2 <input type="radio"/> NI - 1  |  |
|   |  |
| -----   |  |
| <b>Horiz 5-1 Inc Short Words Measure Inline Client Text + Postline Comment (80x5)</b> <input type="radio"/> EX - 5 <input type="radio"/> EE - 4 <input type="radio"/> ME - 3 <input type="radio"/> BE - 2 <input type="radio"/> NI - 1  |  |
|   |  |
| -----   |  |
| <b>Horiz 5-1-N/A (as 0) Numbers only Measure After Client Text - No Comment</b><br><input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 <input type="radio"/> N/A  |  |
| -----   |  |
| <b>Horiz 5-1-N/A (as 0) Numbers only Measure inline with Client Text - No Comment</b> <input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 <input type="radio"/> N/A   |  |
| -----   |  |
| <b>Horiz 5-1-N/A (as -3) Inc Words Measure After Client text - Postline Comment (80x5)</b><br><input type="radio"/> Exceptional - 5 <input type="radio"/> Exceeds Expectations - 4 <input type="radio"/> Meets Expectations - 3 <input type="radio"/> Below Expectations - 2 <input type="radio"/> Needs Improvement - 1 <input type="radio"/> Not Applicable |  |
|   |  |
| -----   |  |
| <b>Horiz 5-1-N/A (as -3) Numbers only Measure After Client text - No Comment</b><br><input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 <input type="radio"/> N/A   |  |
| -----   |  |
| <b>Horiz 5-1-N/A (as -3) Numbers only Measure inline with Client text - No Comment</b> <input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 <input type="radio"/> N/A  |  |

|  |  |
|--|--|
| Vert 5-1-N/A (as -3) Inc Words After measure After Client text + Postline Comment (80x3) | <input type="radio"/> 5 - Exceptional<br><input type="radio"/> 4 - Exceeds Expectations<br><input type="radio"/> 3 - Meets Expectations<br><input type="radio"/> 2 - Below Expectations<br><input type="radio"/> 1 - Needs Improvement<br><input type="radio"/> Not Applicable |
| Vert 5-1-N/A (as -3) Inc Words Measure After Client text + Postline Comment (80x5)       | <input type="radio"/> Exceptional - 5<br><input type="radio"/> Exceeds Expectations - 4<br><input type="radio"/> Meets Expectations - 3<br><input type="radio"/> Below Expectations - 2<br><input type="radio"/> Needs Improvement - 1<br><input type="radio"/> Not Applicable |
| Vert 5-1-N/A (as -3) Inc Words Measure Inline with Client Text + Postline Comment (80x5) | <input type="radio"/> Exceptional - 5<br><input type="radio"/> Exceeds Expectations - 4<br><input type="radio"/> Meets Expectations - 3<br><input type="radio"/> Below Expectations - 2<br><input type="radio"/> Needs Improvement - 1<br><input type="radio"/> Not Applicable |
| Vert EMN Inline with Client Text + Inline Comment (45x3)                                 | <input type="radio"/> EE<br><input type="radio"/> ME<br><input type="radio"/> NI   |
| Horiz Y/N measure After Client Text + Postline Comment (80x3)                            | <input type="radio"/> N <input type="radio"/> Y  |
| Horiz Y/N measure Inline with Client Text (No Comment)                                   | <input type="radio"/> N <input type="radio"/> Y  |
| Horiz Y/N measure Inline with Client Text + Inline Comment (45x3)                        | <input type="radio"/> N <input type="radio"/> Y  |
| Horiz Y/N measure Inline with Client Text + Postline Comment (80x3)                      | <input type="radio"/> N <input type="radio"/> Y  |
| Vert Y/N measure After Client Text + Postline Comment (80x3)                             | <input type="radio"/> N<br><input type="radio"/> Y   |
| Vert OEMNU measures Inline with Client Text + postline Comment (80x3)                    | <input type="radio"/> Outstanding<br><input type="radio"/> Exceeds Requirements<br><input type="radio"/> Meets Requirements<br><input type="radio"/> Needs Improvement<br><input type="radio"/> Unsatisfactory   |

All the above **Standard question** components offer a fixed answer against the radio buttons that can not be changed. In some cases you should add text to describe the choice of answers in more detail, for instance, 'Choose between 1 and 5 where 1 is most and 5 is least'.

## Manually Set Values/Answers

Vert MANUAL SET VALUES/MEASURES After Client text - No Comment

Answer 1  
 Answer 2  
 Answer 3

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Vert MANUAL SET VALUES/MEASURES After Client text - Postline Comment (80x10)

Answer 1  
 Answer 2  
 Answer 3

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Vert MANUAL SET VALUES/MEASURES After Client text - Postline Comment (80x3)

Answer 1  
 Answer 2  
 Answer 3

It is possible to specify the text and scoring of the answers by choosing **MANUAL SET VALUES/MEASURES**. The choice of answers are added to 'ALT [Alternative] Measure Array Values' in the following format:

0;Blue;1;Green;2;Yellow;3;Purple;4;White

## ToDo Preset Actions Component

| ToDo Preset Actions / Todo's               |                        |       |
|--|------------------------|-------|
| ToDo Preset Actions / Todo's Action / ToDo | Owner                  | Re By |
| <a href="#">TD001251</a> Sleep             | Porter group manager.L | 16    |

A ToDo template or pack of pre-built tasks can be automatically raised when a form is issued to an employee. **ToDo Preset Actions** Component allows you to follow that set of tasks directly from the form.

The 'ToDo From Template Set' should be specified to determine which ToDo Template to show.

## ToDoS (Set Goals and Development Plans)

| ToDo - Set Development Plans       |  | Required From | Required By          |
|------------------------------------|--|---------------|----------------------|
| Action / ToDo OPTIONAL TO BE ADDED |  | Select Value  | <input type="text"/> |
| Detail                             |  |               |                      |
| Deliverable Steps                  |  |               |                      |
| Measure of Success                 |  |               |                      |
| ToDo - Set Goals                   |  | Required From | Required By          |
| Action / ToDo OPTIONAL TO BE ADDED |  | Select Value  | <input type="text"/> |
| Detail                             |  |               |                      |
| Deliverable Steps                  |  |               |                      |
| Measure of Success                 |  |               |                      |

These **ToDo Components** allow for a particular number of Goals and/or Development Plans to be listed as required.

By providing a unique 'Section Num' then these ToDoS can be reviewed in subsequent appraisals.

## ToDo (Review)

| ToDo - Review               |                    |                 |
|-----------------------------|--------------------|-----------------|
| Action / ToDo               |                    |                 |
| TD001250 sdfsf              |                    |                 |
| Required From               | Required By Status | Closed On SCORE |
| Porter sysadmin.LJ          | User to Accept     | N/A             |
| Detail                      |                    |                 |
| dfdsf                       |                    |                 |
| How Achieved / Accomplished |                    |                 |
| Deliverable Steps           |                    |                 |
| dsfdfsds                    |                    |                 |
| How Achieved / Accomplished |                    |                 |
| Measure of Success          |                    |                 |
| dsfdfsdf                    |                    |                 |
| How Achieved / Accomplished |                    |                 |

With the provision of a unique identifier in the Section Num of the Goals or Development Plans, the **ToDo Review** Component can follow the progress of the raised Goals and Development Plans.