

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.

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.

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
Total/Section Summary Results	TOTAL	
Total/Section Summary Results	SECTION 1	TOTAL
Question 1a		SECTION 1
Question 1b		SECTION 1
Total/Section Summary Results	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 *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#
#o##li#Numbered list 1,2,3#/li##/o##
#ul##li#Bulleted 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

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

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

Horiz 5-1 Inc Short Words Measure After Client Text + Postline Comment (80x5)

EX - 5 EE - 4 ME - 3 BE - 2 NI - 1

Horiz 5-1 Inc Short Words Measure Inline Client Text + Postline Comment (80x5) EX - 5 EE - 4 ME - 3 BE - 2 NI - 1

Horiz 5-1-N/A (as 0) Numbers only Measure After Client Text - No Comment

5 4 3 2 1 N/A

Horiz 5-1-N/A (as 0) Numbers only Measure inline with Client Text - No Comment 5 4 3 2 1 N/A

Horiz 5-1-N/A (as -3) Inc Words Measure After Client text - Postline Comment (80x5)

Exceptional - 5 Exceeds Expectations - 4 Meets Expectations - 3 Below Expectations - 2 Needs Improvement - 1 Not Applicable

Horiz 5-1-N/A (as -3) Numbers only Measure After Client text - No Comment

5 4 3 2 1 N/A

Horiz 5-1-N/A (as -3) Numbers only Measure inline with Client text - No Comment 5 4 3 2 1 N/A

Vert 5-1-N/A (as -3) Inc Words After measure After Client text + Postline Comment (80x3)

5 - Exceptional
 4 - Exceeds Expectations
 3 - Meets Expectations
 2 - Below Expectations
 1 - Needs Improvement
 Not Applicable

Vert 5-1-N/A (as -3) Inc Words Measure After Client text + Postline Comment (80x5)

Exceptional - 5
 Exceeds Expectations - 4
 Meets Expectations - 3
 Below Expectations - 2
 Needs Improvement - 1
 Not Applicable

Vert 5-1-N/A (as -3) Inc Words Measure Inline with Client Text + Postline Comment (80x5)

Exceptional - 5
 Exceeds Expectations - 4
 Meets Expectations - 3
 Below Expectations - 2
 Needs Improvement - 1
 Not Applicable

Vert EMN Inline with Client Text + Inline Comment (45x3)

EE
 ME
 NI

Horiz Y/N measure After Client Text + Postline Comment (80x3)

N Y

Horiz Y/N measure Inline with Client Text (No Comment)

N Y

Horiz Y/N measure Inline with Client Text + Inline Comment (45x3)

N Y

Horiz Y/N measure Inline with Client Text + Postline Comment (80x3)

N Y

Vert Y/N measure After Client Text + Postline Comment (80x3)

N
 Y

Vert OEMNU measures Inline with Client Text + postline Comment (80x3)

Outstanding
 Exceeds Requirements
 Meets Requirements
 Needs Improvement
 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

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

Answer 1
 Answer 2
 Answer 3

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
TD001251 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.

ToDo (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		Required From	Required By	Status	Closed On	SCORE
Action / ToDo		Porter sysadmin.LJ	User to Accept	N/A		
Detail		How Achieved / Accomplished				
Deliverable Steps		How Achieved / Accomplished				
Measure of Success		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.