

sage

People

Customer Support Guide

HCM Forms – Self Service Delivery





Contents

Purpose.....	2
Rationale.....	2
HCM Form Definitions	3
Related Documentation.....	6

Package	Version	Date
HCM	16.09	02/12/2016
	19.15	12/07/2017



People

Purpose

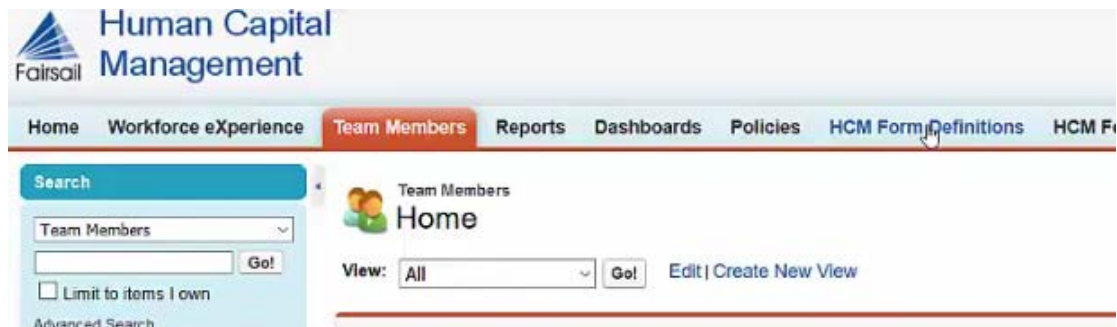
This guide explains how to display a Form to your employees. For detailed information please refer to the HCM Configuration Guide which can be found in [Sage Business Cloud People Support](#).

Rationale

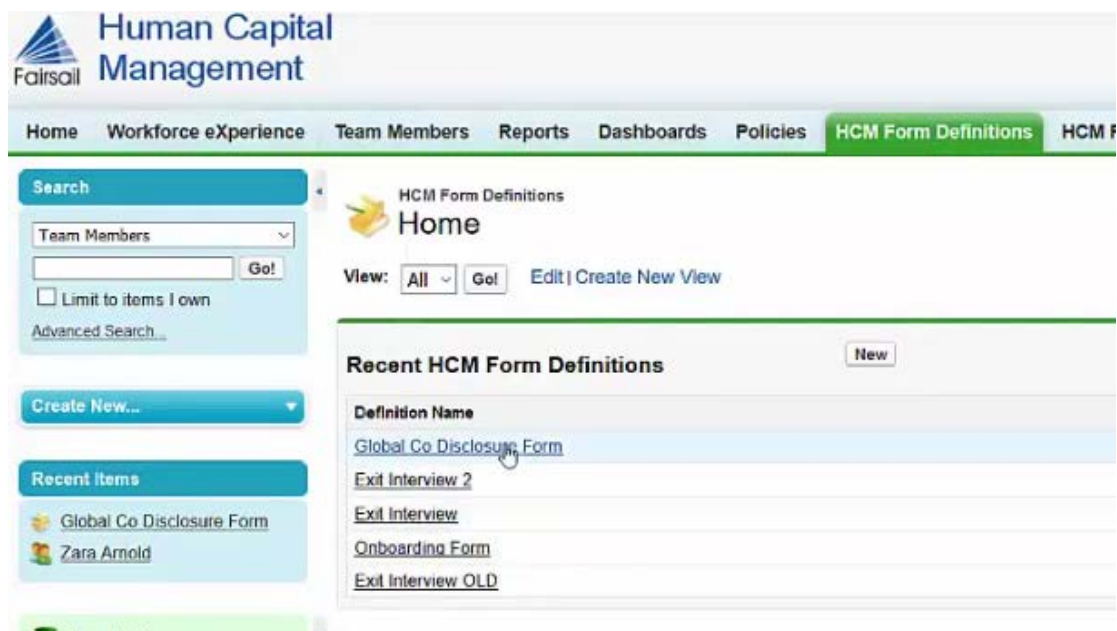
Forms can be delivered to your employees either by email or displayed in WX. This mini guide explains how to display a Form in WX.

HCM Form Definitions

Select the **HCM Forms Definitions** tab.



Select a Form, in our example select the **Global Co Disclosure Form**.



Select the **Policies** tab.

HCM Form Definition
Global Co Disclosure Form

HCM Form Definition [Visual Edit] [XML Edit] [Delete] [Completed Forms to Excel]

Form Definition Details
Definition Name: Global Co Disclosure Form

[Visual Edit] [XML Edit] [Delete] [Completed Forms to Excel]

Form [Emails] [Data Links] [Policies]

```
<form title="Global Co Disclosure Form" stylesheet="/resource/FormDef1">
  <page id="Read" navigation="true" name="Read">
    <question name="DateCompleted" prompt="Date completed: " type="date"></question>
    <question name="Read" prompt="I read the Conflict of Interest Policy and confirm I disclose the following information" type="checkboxhtml"></question>
    <question name="DiscloseFollowing" prompt="I have read the Global Bribery and Corruption Policy and confirm I disclose the following information" type="checkboxhtml"></question>
    <question name="Nature" prompt="Nature of conflict of interest/gift"></question>
  </page>
</form>
```

Select **New Form Policy** button.

HCM Form Definition
Global Co Disclosure Form

HCM Form Definition [Visual Edit] [XML Edit] [Delete] [Completed Forms to Excel]

Form Definition Details
Definition Name: Global Co Disclosure Form

[Visual Edit] [XML Edit] [Delete] [Completed Forms to Excel]

Form [Emails] [Data Links] [Policies]

Form Policies [New Form Policy]

Policy Name

[New Form Policy]

Select the name of the Policy for the group of people who should see this Form in WX.

- **Team Member Start** – if checked the Team Member can start the Form.
- **Manager Starts** – if checked the Manager can start the Form.
- **Manager Approves** – If a Team Member starts the Form and submits it the Manager will get an action to approve.

Select **Save**.

If the Forms checkbox has been ticked in the Policy, the Form will now display in WX.



People

Related Documentation

Videos;

[HCM Forms Overview - Sending & Reporting](#)

[HCM Forms - Visual Edit](#)

[HCM Forms - Self Service Delivery](#)

[How to view HCM forms](#)