

sage

People

Customer Support Guide

HCM Forms – Visual Edit





Contents

Purpose	2
Rationale	2
HCM Form	3
Advanced Mode	5
Related Documentation	6

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



People

Purpose

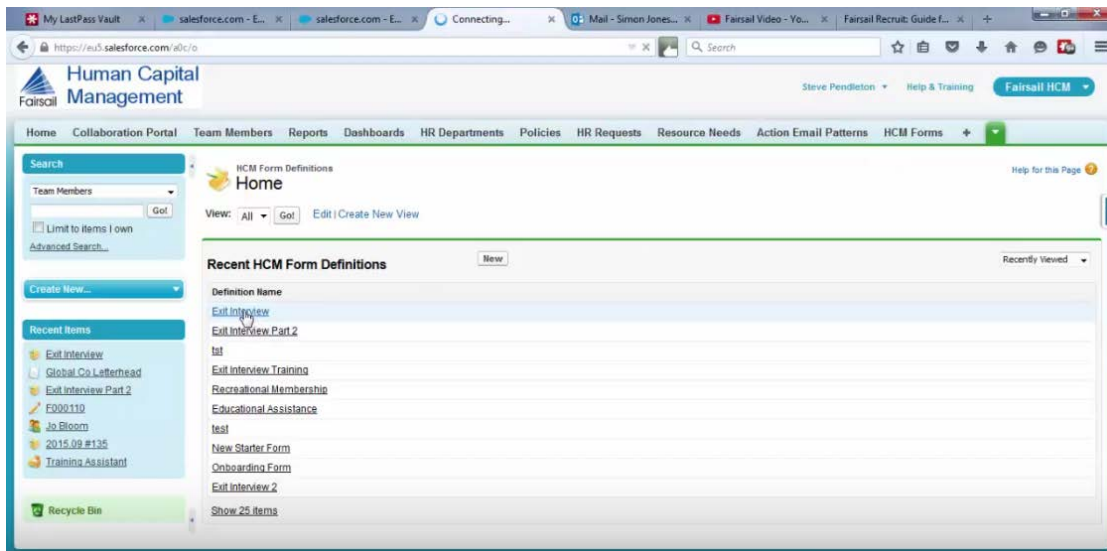
This guide explains how to access the questions and answers which sit behind a HCM Form. For detailed information please refer to the HCM Configuration Guide which can be found in [Sage Business Cloud People Support](#).

Rationale

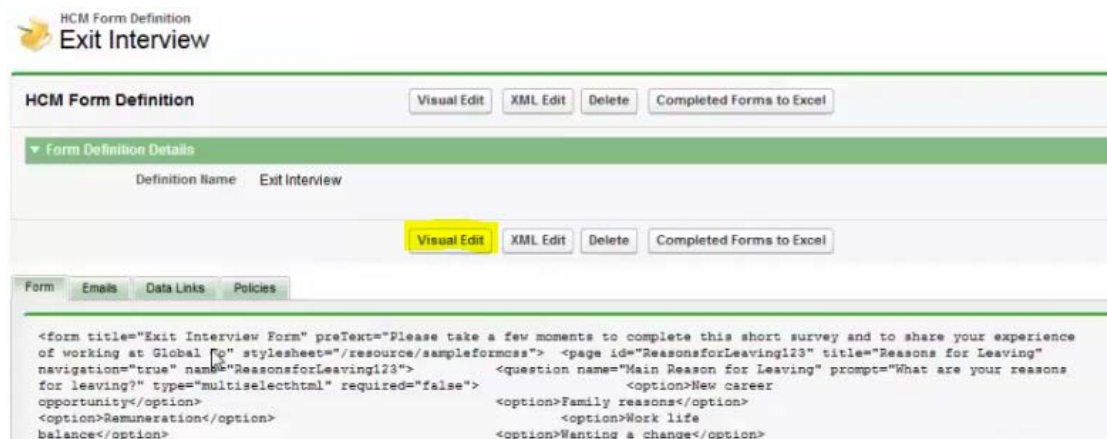
When creating a Form, for example a survey, you will need to create the questions and answers. These are added using pick lists, text boxes, radio buttons, etc. This information is stored in the Visual Edit part of a HCM Form.

HCM Form

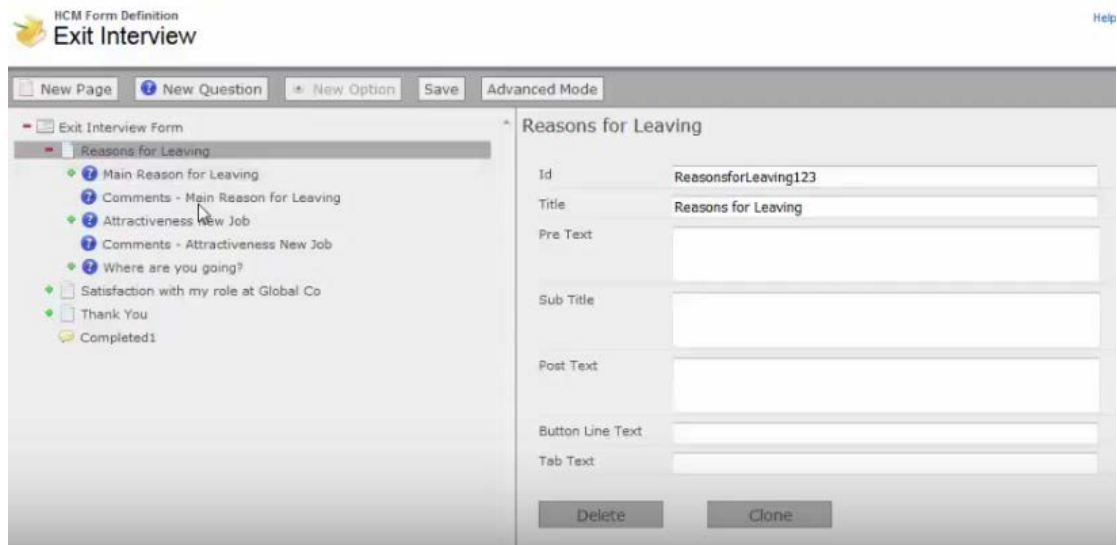
Locate your form by selecting the tab **HCM Form Definitions**, for this example we will look at the Exit Interview form.



When you want to build up the questions around your Form select the **Visual Edit** button. The XML displayed below is built as a consequence of the Visual Edit.

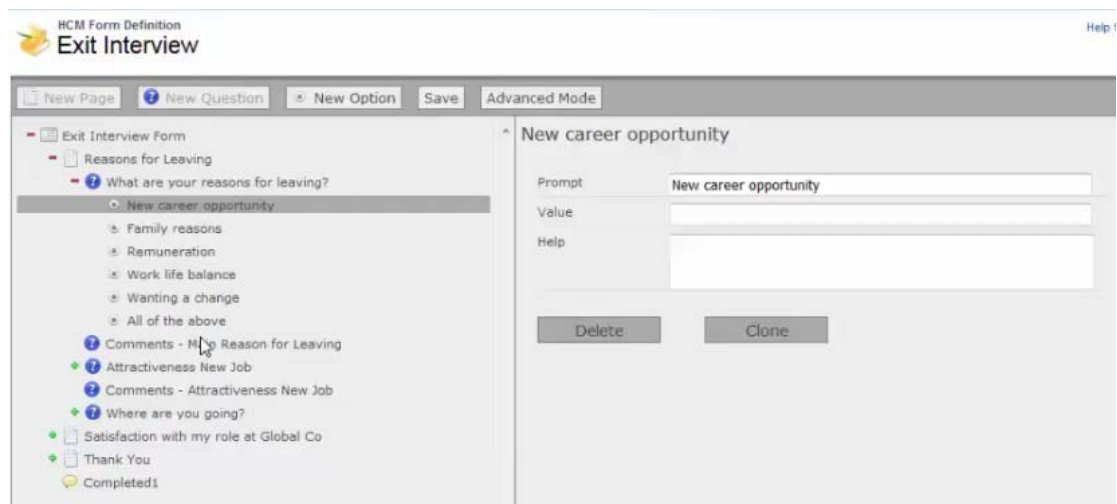


When selecting the **Visual Edit** button, you are presented with the pages and information which makes up the form.



The **ID** contains the unique id of the form.
Title contains the name of the page.

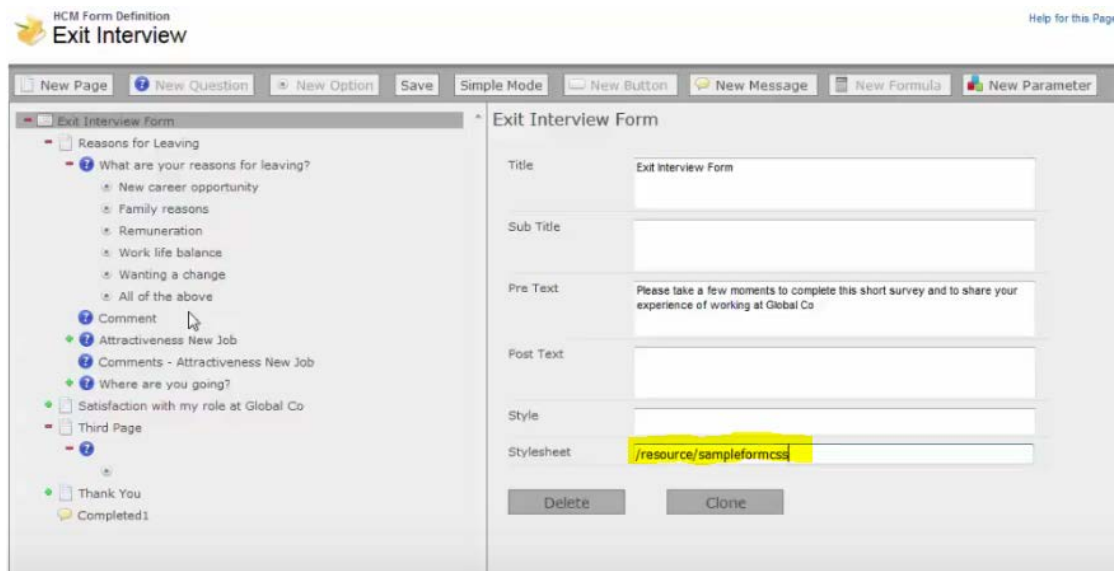
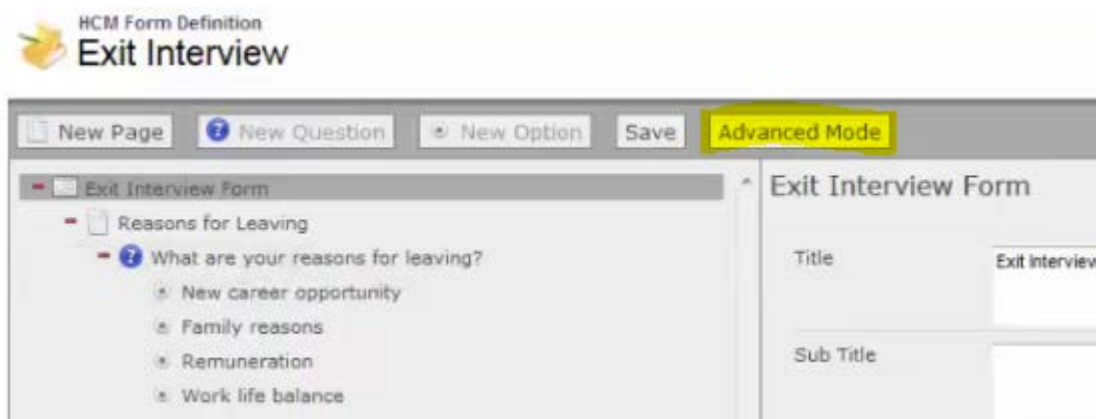
Expanding the questions displays the possible answers.



You are also able to add new questions. Detailed instructions on how to do this is provided in the **HCM Form – Visual Edit** video.

Advanced Mode

When accessing a Form the initial view is **Simple Mode** by selecting the **Advanced Mode** button, you can see the id of the Stylesheet. The Stylesheet contains information around the styling of the form, colour, how the buttons are presented, etc.





People

Related Documentation

Videos;

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

[HCM Forms - Visual Edit](#)

[HCM Forms - Self Service Delivery](#)

[How to view HCM forms](#)