



Quick Setup Guide

Form Branching Logic

2.16

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How to setup Form Branching Logic

OBJECTIVE: This document is a quick reference guide on how to setup and manage Form Branching Logic for both back-end and front-end users

In some cases, questions or sections of a form may not be required or applicable, depending on the answer given to a prior question on a form.

Form branching is now available, allowing the ability to show and hide questions and sections in a form based on the answer to previous question(s).

First off, let's see how data will be set up in **Admin App...**

WHO WILL DO THIS? A back-end user with access to the Admin App, possibly someone in HR who oversees the Form Builder, Form Library Items and Form Submission Manager menus. This type of user will build/create the form, the form library item and have access to view/export and analyze form submissions.

Form Builder – Enabling use of Conditional Questions

Log on to the Admin application and navigate to Library > Form Builder. Select an existing form or create a new one.

The Form Builder has a Question Display section.

- Always display all questions in order (existing functionality)
- Allow randomization (existing functionality)
- Allow conditional questions (new functionality)

The screenshot shows the Form Builder interface. At the top, there's a navigation bar with 'Menu', 'Home', 'Form Builder', and 'Form Builder' tabs. A user profile for 'Fegan, Hillary' is visible in the top right. The main content area has tabs for 'Form', 'Calculated Value', and 'Multi-User'. The 'Form' tab is active, showing fields for 'Form Title' (Employee Satisfaction), 'Form Type' (Form), and 'Active' (checked). Below these are 'Versions' and 'Version Notes' sections. The 'Group Properties' section includes checkboxes for 'Automatically number sections in this form', 'Display each section on a different page', and 'Add together the answers to all numeric questions and display at the end of the form'. The 'Question Display' section, highlighted with an orange box, contains four radio button options: 'Always display all questions in order', 'Allow randomization', 'Shuffle the order of questions', and 'Allow conditional questions'. The 'Allow conditional questions' option is selected and highlighted with a red box. Below this is a 'Permissions' section with a dropdown menu and a 'Change...' button. At the bottom, there's a 'Who can edit this form?' section.

By Default, the “Allow conditional questions” option is not enabled. You must select the radio button and then select the “Apply” button to save the configuration. Only one of the Question Display options can be enabled at a time.

Form Builder – Creating a Conditional Question.

Conditional Questions:

- A single question, multiple questions, or an entire form section can be hidden or displayed with the use of branching logic.
- To configure a conditional question, there must be a prior question with response type of multiple choice or dropdown.
- Questions can be configured with one or many conditional rules.
- Questions can be configured with Equals or Does Not Equal criteria.
- Conditional questions can be optional or mandatory.
- Branching Logic can impact the flow of multi-user forms. If all questions in a section assigned to a user are skipped due to conditions met, the section assignee will not be assigned the form nor will a notification be sent.
- Conditional questions can be viewed in forms' analytics menus and exports.

To create a conditional question, you must first have at least one prior question with a response type of multiple choice or dropdown.

For this example, I am using a question “How satisfied are you with your work on a day to day basis” with a multiple-choice response type. Based on the response to this question, I may want to display an additional question(s) to the form user:

Example – If an employee answers that they are “Very Unsatisfied” or “Unsatisfied”, you may want to display an additional question(s) to gather more information about why the employee is not satisfied that you otherwise wouldn’t display if they were satisfied. Additionally, you may want to display a different question if the employee is satisfied with their job.

- Select New > Question.
- Create the question and response type, and responses if applicable. A conditional question can have any response type.
- Select the “Conditional” tab (The Conditional tab is only active and selectable if the Form Builder has the “Allow Conditional Questions” option enabled).



The Conditional tab has two radio buttons:

- The first is labelled "This question is always asked" and is the default selection for both existing and new forms.
- The second is labelled "Ask this question if ____:". This option has a dropdown list containing the options "all of the following conditions are met" and "any of the following conditions are met". Select one of the options.
 - Selecting "All of the following conditions are met" means that all configured conditions must be met to display the question to the user.
 - Selecting "Any of the following conditions are met" means that only one of the configured conditions needs to be met to display the question to the user.

Select the second radio button for "Ask this question if ____" and select the criteria to make the question conditional.

The screenshot shows the Form Builder interface. On the left, a sidebar lists questions: "Employee Satisfaction - HF" and "Your Job". The main area displays the "Conditional" tab for a question. Two radio buttons are visible: "This question is always asked" (unselected) and "Ask this question if" (selected). Below the selected radio button is a dropdown menu with two options: "all of the following conditions are met" and "any of the following conditions are met". A red box highlights the "Ask this question if" radio button and the dropdown menu. To the right of the dropdown is a "Remove" button. Below the dropdown is an "Add a Condition" button. The top of the interface shows a navigation bar with "Menu", "Home", and "Form Builder" tabs. The right side shows a user profile for "Fegan, Hillary" and a "Sign Out" button.

The area below the radio buttons will contain three rows. Each section contains criteria that is used to evaluate whether the question will be shown to the form user.

- On the left is a dropdown list of all questions in the form, prior to the current question, which have multiple choice or dropdown responses.

The screenshot shows the 'Form Builder' interface for 'Employee Satisfaction - HF'. The 'Conditional' tab is active. A modal window is open, showing a search for a question. The search results list the question: 'How satisfied are you with your work on a day to day basis?'.

- In the middle is a dropdown with the values "Equals" and "Does not equal".

The screenshot shows the 'Form Builder' interface for 'Employee Satisfaction - HF'. The 'Conditional' tab is active. A dropdown menu is open, showing the options 'Equals' and 'Does not equal'.

- On the right is a dropdown with a list of all possible answers for the selected question selected in the first row. Select the desired response to complete the condition configuration.

Once the condition is added, you can select “Add a Condition” to add another or “Apply” to save your conditions. If you wish to remove a condition, select the “remove” button beside the applicable row.

Example: In the scenario above, the conditional question will be displayed to the user if the response to the “How Satisfied are you with your work on a day-to-day basis” is “Very Unsatisfied” or “Unsatisfied”.

The screenshot shows the 'Form Builder' interface for a form titled 'Employee Satisfaction - HF'. The left sidebar lists the form structure: 'Employee Satisfaction - HF' and 'Your Job'. Under 'Your Job', there are three questions: 'How satisfied are you with yo...' (score 5), 'How can we help you feel bett...' (score 0), and 'What factors are contributing t...' (score 0). The main area shows the 'Conditional' tab for the third question. It has two options: 'This question is always asked' (unselected) and 'Ask this question if any of the following conditions are met' (selected). Below this, there are two conditions: 'How satisfied are you with your work on a day to' equals 'Very satisfied' and 'How satisfied are you with your work on a day to' equals 'Satisfied'. Each condition has a 'Remove' button. An 'Add a Condition' button is at the bottom.

In the scenario above, the conditional question “What factors are contributing to your satisfaction with your day to day work?” will be displayed to the user if the response to the previous question is “Very Satisfied” or “Satisfied”.

Form Builder – Re-Ordering Questions

Conditional questions must be after the question which the conditions are based on. If you attempt to drag and drop questions into an order that prevents the branching logic from working, the action will be prevented, and an error will be displayed.

The screenshot shows the Form Builder interface for a form titled "Employee Satisfaction - HF". The interface includes a sidebar with a list of questions, a main form editor, and a versions section. An error message is displayed in a red-bordered box, stating: "Delete failed. You cannot move this question here, because it would mean at least one conditional question would be asked before the questions it depends on." The error message is overlaid on the form editor, which shows a question titled "How satisfied are you with your..." with a value of 5. The versions section shows "Version: 1" and a "Publish this version" button. The form editor also includes a "Form Title" field, a "Form Type" dropdown, and a "Form" checkbox.

When the form setup is complete, you can finalize the version and add the form to a library item.

- ✓ Now that all the supporting data for Conditional Questions is setup, users can utilize Form Branching Logic.
- ✓ Let's look at how to do this in the next section...

End users can be assigned the form or select the form from the Library. Conditional questions in the form will be shown or hidden, in real time, based on fulfillment of their conditions. An entire section of the form and its corresponding workflow may also be hidden if conditions are met to do so.

Using the Employee Satisfaction form that was built above, let's walk through branching logic from the form user's perspective.

When the form is started, one question is displayed, all other questions in this form are conditional. If the response "In between" is selected, no additional questions are displayed, and the user can complete the form.

The screenshot displays the 'Employee Satisfaction' form (ID: PS-29574) within a user interface. The form is titled '1. Your Job' and asks, 'How satisfied are you with your work on a day to day basis? (Required)'. The response options are radio buttons: 'Very unsatisfied', 'Unsatisfied', 'In between' (selected), 'Satisfied', and 'Very satisfied'. Below the question is a 'Notes (0)' section with an 'ADD A NOTE' button. At the bottom of the form, there are three buttons: 'COMPLETE FORM' (highlighted with a mouse cursor), 'SAVE FOR LATER', and 'DISCARD FORM'. The background shows a sidebar with navigation links like Messages, Notice Board, My Activities, My Team, Library, Careers, Recruiting, Analytics, Need Assistance, and Admin. On the right, there's a 'Form Submission #FS-29574' section with 'START NOW' and 'START NEW FORM' buttons, and links for 'Send a message about this form...' and 'Contacts'.

If a user responds, “Very Unsatisfied” or “Unsatisfied”, a secondary question “How can we help you feel better about your day-to-day work?” is displayed to the user based on the conditions that have been met. This question is mandatory, so the user must answer the question to complete the form.

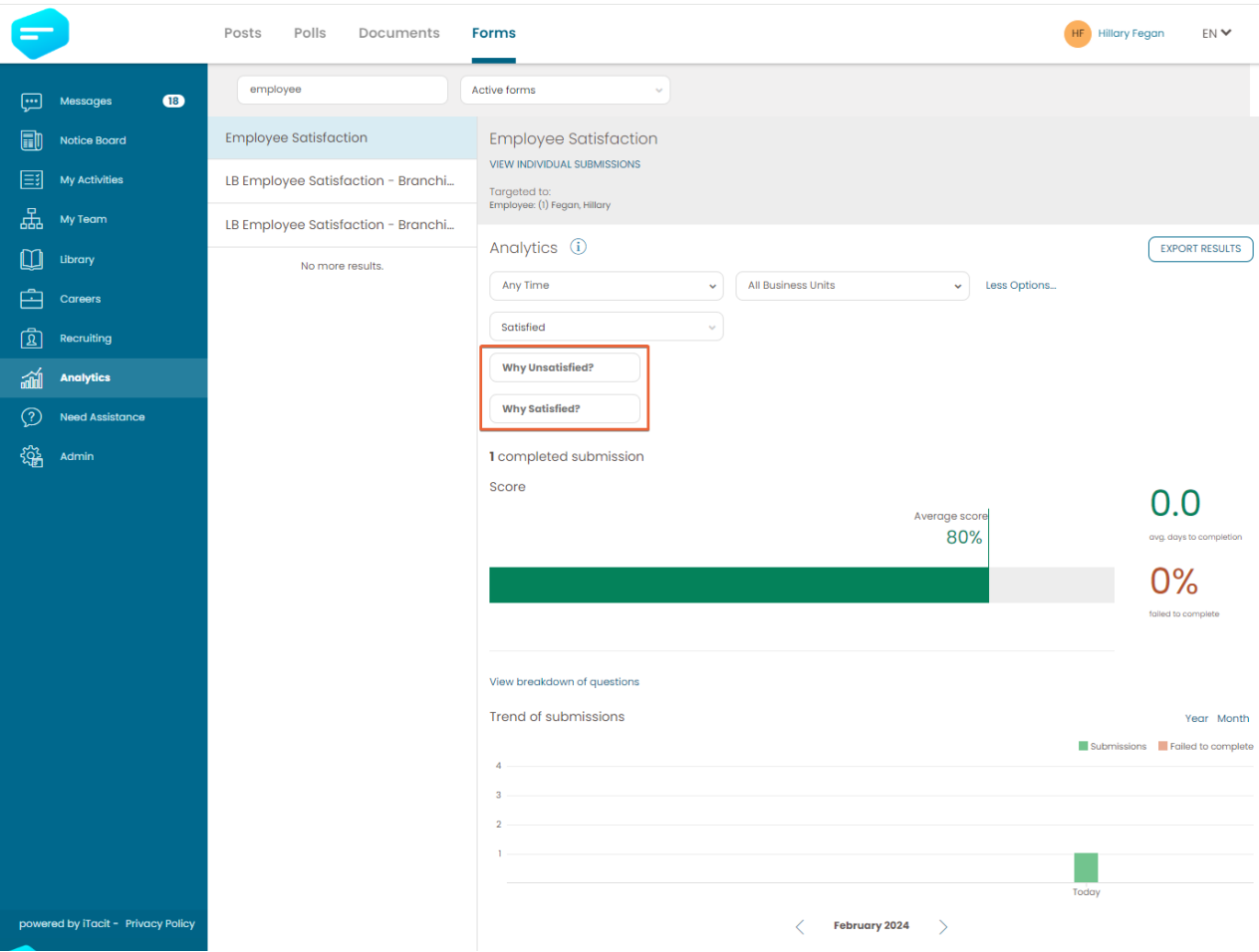
The screenshot shows the 'Employee Satisfaction' form (FS-29575) in a web application. The form is titled '1. Your Job' and contains the question 'How satisfied are you with your work on a day to day basis? (Required)'. The radio button for 'Very unsatisfied' is selected. Below this question is another mandatory question: 'How can we help you feel better about your day to day work? (Required)', which has an empty text input field. A red error message 'This answer is required.' is displayed below the input field. At the bottom of the form, there is a 'Notes (0)' section with an 'ADD A NOTE' button and three buttons: 'COMPLETE FORM', 'SAVE FOR LATER', and 'DISCARD FORM'. The background shows a sidebar with navigation links like Messages, Notice Board, My Activities, My Team, Library, Careers, Recruiting, Analytics, Need Assistance, and Admin.

If “Satisfied” or “Very Satisfied” is the selected response, then a different conditional question “What factors are contributing to your satisfaction with your day-to-day work?” is displayed to the user based on different conditions being met.

The screenshot shows the 'Employee Satisfaction' form (FS-29576) in a web application. The form is titled '1. Your Job' and contains the question 'How satisfied are you with your work on a day to day basis? (Required)'. The radio button for 'Satisfied' is selected. Below this question is a different mandatory question: 'What factors are contributing to your satisfaction with your day to day work? (Required)', which has an empty text input field. A red error message 'This answer is required.' is displayed below the input field. At the bottom of the form, there is a 'Notes (0)' section with an 'ADD A NOTE' button and three buttons: 'COMPLETE FORM', 'SAVE FOR LATER', and 'DISCARD FORM'. The background shows the same sidebar as the previous screenshot.

Form Branching in Form Analytics

Upon creation of the form, any question configured to show in Form Analytics regardless of it's conditional or non-conditional status will appear on the form's Analytics page.



Branching Logic in Form Submission Manager

The Form Submission Manager can export responses for all conditional responses. Conditional questions that were not displayed/asked show as blank in the appropriate row and column of the export.

	AR	AS	AT	AU
1	Section	How satisfied are you with your work on a day to day basis?	How can we help you feel better about your day to day work?	What factors are contributing to your satisfaction with your day to day work?
2	Your Job	In between		
3	Your Job	Very unsatisfied	Increase in pay	
4	Your Job	Satisfied		My supervisor is great
5				