



# NICE PUBLIC SAFETY SOLUTIONS

# NICE INFORM TEMPLATE

# DESIGNER USER GUIDE

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**NICE** • Inform

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## 1 Welcome

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The NICE Inform Template Designer application provides the ability to create forms and templates that other applications within NICE Inform require.

It is the tool that enables you to generate forms for NICE Inform Evaluator.

The NICE Inform Template Designer application enables you to:

- Create new forms and question types.
- Create new sections and questions for created forms.

### [Saving and canceling changes](#)

The Template Designer application consists of many tabbed pages. Many of these pages have a **Save** and a **Cancel** button.

The **Save** button commits the changes you have just made. If you try and navigate from the page without saving you are asked if you wish to save the changes. If at any time you wish to change any settings back as they were, click the **Cancel** button prior to clicking the **Save** button.

### [Application privileges](#)

To use the Template Designer application, you **MUST** have the required privilege allocated to you (see *Application privileges* in *NICE Inform User Administration*). If not, the Template Designer option is not displayed in the Application selector bar when you log in.

## 2 Navigation panel

**NOTE:** Specific terminology is used when navigating the tree pane. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

The Navigation panel consists of a tree pane which has the following nodes:

- **Evaluation forms**  - a fixed node that lists the evaluation forms that have been created. Select this node and the right hand pane changes to display the [Evaluation forms table](#) (see page 3). There are three different states:
  - **Draft**  - forms that are still being updated. They can be edited or deleted but cannot be used in evaluations.
  - **Active**  - forms that are completed and can be used for new evaluations. They cannot be edited or deleted.
  - **Retired**  - forms that have been retired can no longer be used for new evaluations. Current evaluations that are using these forms are unaffected.

**NOTE:** Retired forms can be deleted once they are no longer used in any evaluations.

- **Question types**  - a fixed node that lists the question types that have been created. Select this node and the right hand pane changes to display the [Question types table](#) (see page 3).
  - **Available**  - question type that is available editing.
  - **Locked**  - question type that is being used in at least one evaluation form and cannot be edited.
- **Default question types**  - question types that are provided by default. These question types cannot be edited but with the exception of Free text, they can be deleted unless the question type is currently being used within at least one evaluation form. The following default question types are provided:
  - **Boolean: True/False**
  - **Boolean: Yes/No**
  - **Free text**
  - **Range: Zero to Five**
  - **Range: Zero to Ten**

### 2.1 Button bar

Table 2-1: Template Designer button bar

Button	Description
	<b>Create new item</b> - displays a drop down menu that allows you to create new evaluation forms and question types.
	<b>Delete</b> - deletes the current tree pane selection. You are required to confirm the action. The button remains inactive until you select a node or branch that allows you to perform

Button	Description
	this function.
 ▾	<b>Export and import</b> - displays a drop down menu that allows you to export and import an evaluation form.
	<b>Refresh</b> - updates the tree structure and any lists displayed in the right hand pane.

## 2.2 Evaluation forms table

To display the Evaluation forms table, select the **Evaluation forms** node in the [Navigation panel](#) (see page 2) tree pane.

The right hand pane updates to display (in the form of a table) all the evaluation forms that have been configured in NICE Inform Template Designer.

The Evaluation forms table displays the following information:

**NOTE:** Each column can be sorted in descending or ascending order by clicking the column heading. You can also reorder the columns by dragging them to the required location.

**Table 2-2: Evaluation forms**

Column	Description
Name	The name of the evaluation form.
Status	The current status of the evaluation form (Draft, Active or Retired).
Description	The description for the evaluation form.

To view an evaluation form, double-click the evaluation form in the table.

## 2.3 Question types table

To display the Question types table, select the **Question types** node in the [Navigation panel](#) (see page 2) tree pane.

The right hand pane updates to display (in the form of a table) all the question types that have been configured in NICE Inform Template Designer.

The Question types table displays the following information:

**Table 2-3: Question types**

Column	Description
Name	The name of the question type

To view a question type, double-click the question type in the table.

## 2.4 Tree structure terminology

A tree structure is used throughout NICE Inform to aid in your navigation of the application suite and is required to perform further functions. Using the Resource Groups section in System Administration as an example, there are a number of terms used when navigating the tree:

**NOTE:** Refer to the table below for a key to each feature.

Figure 2-1: Navigating the tree example



Table 2-4: Tree structure terminology

Feature number	Description
1	Nodes
2	Parent
3	Child/sub group

- **Node** - everything in the tree is classed as a node.
- **Parent** - the top level node e.g. **Resource Groups**.
- **Child** (or sub group) - the node below its parent.
- A child (or sub group) can also be a parent as well. Using the example above, the **Dispatchers** node is a child of the **Resource Groups** node but is also a parent of the **First response** node.
- To expand a node, click the button alongside the node.
- To collapse a node, click the button alongside the node.

## 3 Template Designer functions

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The main actions involved in Template Designer are:

### Evaluation forms

- [Creating a new evaluation form](#) (see page 6) - enables you to create a new evaluation form.
- [Creating a new evaluation form based upon an existing form](#) (see page 6) - enables you to create a new evaluation form based upon an existing evaluation form by creating a copy.
- [Deleting an evaluation form](#) (see page 7) - enables you to delete an evaluation form.
- [Exporting an evaluation form](#) (see page 8) - enables you to export your evaluation form.
- [Importing an evaluation form](#) (see page 8) - enables you to import an evaluation form.
- [Editing evaluation form details](#) (see page 14) - enables you to edit the details for the evaluation form.
- [Configuring evaluation form questions and sections](#) (see page 15) - enables you to edit the questions for the evaluation form
- [Adding a new section](#) (see page 16) - enables you to add a new section for the evaluation form.
- [Editing a section](#) (see page 17) - enables you to edit a section within an evaluation form.
- [Deleting a section](#) (see page 17) - enables you to delete a section from an evaluation form.
- [Adding a new question](#) (see page 18) - enables you to add a new question for the evaluation form.
- [Editing a question](#) (see page 20) - enables you to edit a question within an evaluation form.
- [Deleting a question](#) (see page 21) - enables you to delete a question from an evaluation form.

### Question types

- [Creating a new question type](#) (see page 10) - enables you to create a new question type that is available for the evaluation form.
- [Editing a question type](#) (see page 11) - enables you to edit a question type.
- [Deleting a question type](#) (see page 12) - enables you to delete a question type.

## 4 Managing evaluation forms

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This section covers the management of all evaluation forms that are used within NICE Inform Evaluator.

Features within this section include:

- [Creating a new evaluation form \(see page 6\)](#)
- [Creating a new evaluation form based upon an existing form \(see page 6\)](#)
- [Deleting an evaluation form \(see page 7\)](#)
- [Exporting an evaluation form \(see page 8\)](#)
- [Importing an evaluation form \(see page 8\)](#)

### 4.1 Creating a new evaluation form

► To create a new evaluation form:

1. Click the **Create new item**  button and select the **New Evaluation Form** option from the drop down menu. The **New Evaluation Form Wizard** opens at the **Welcome** screen.
2. Click the **Next** button and the **Evaluation Form Details** screen is presented.
3. Enter the following details using the text boxes provided:
  - **Name** - enter a name for the evaluation form.

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**NOTE:** The evaluation form name **MUST** be unique.

- **Description** - enter a description (if required) for the evaluation form.

4. Click the **Next** button and the **Summary** screen is presented displaying the evaluation form configuration.
5. Click the **Finish** button to exit the wizard.

The new evaluation form is created as a **Draft** status and is ready to be updated with the following:

- [New sections \(refer to \[Adding a new section \\(see page 16\\)\]\(#\)\).](#)
- [New questions \(refer to \[Adding a new question \\(see page 18\\)\]\(#\)\).](#)

## 4.2 Creating a new evaluation form based upon an existing form

**NOTE:** Specific terminology is used when navigating the tree pane to create an evaluation form based upon an existing evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

This section details the creation of a new evaluation form based upon an existing evaluation form. Using this method, an existing evaluation form is copied and then can be customized to suit your requirements. This is useful if you require creating similar evaluation forms.

To create a new evaluation form, refer to [Creating a new evaluation form](#) (see page 6).

► To create a new evaluation from based upon an existing evaluation form:

1. In the tree pane, expand the **Evaluation forms**  node and select the evaluation form to be copied.
2. Click the **Create new item**  button and select the **Copy Evaluation Form** option from the drop down menu.

A copy of the evaluation form is now made and the General page updates to display the name of the form with the word (copy) added at the end.

All of the evaluation form details, sections and questions have all been copied ready for you to make any required changes. For help updating these areas refer to the following sections:

- [Editing evaluation form details](#) (see page 14)
- [Editing a section](#) (see page 17)
- [Editing a question](#) (see page 20)

## 4.3 Deleting an evaluation form

**NOTE:** Specific terminology is used when navigating the tree pane to delete an evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

You can only delete an evaluation form if it is not currently being used by any evaluations.

► To delete an evaluation form:

1. In the tree pane, expand the **Evaluation forms**  node and select the evaluation form to be deleted.
2. Click the **Delete**  button. A message is presented confirming the deletion.
3. Click the **Yes** button.

The evaluation form is now deleted.

## 4.4 Exporting an evaluation form

**NOTE:** Specific terminology is used when navigating the tree pane to export an evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

- ▶ To export an evaluation form:
  1. In the tree pane, expand the **Evaluation forms**  node and select the evaluation form to be exported.
  2. Click the **Export and Import evaluation form**  button and select **Import evaluation form** option from the drop down menu. The **Export Evaluation Form** dialog is presented.
  3. Enter a filename for the evaluation form in the **Name** text box.
  4. Do one of the following:
    - Click the **Browse** button, select a location to save the evaluation form and click the **Save** button.
    - Leave the default location: *My Documents\NICE Inform\My Evaluation Forms*.
  5. Click the **OK** button.
  6. A progress dialog is presented providing a summary of the evaluation form that is being exported.
  7. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the export process completes, unless an error has occurred.
    - Once the export process is complete, click the **Close** button to close the dialog.

The exported template can now be copied to removable media or attached to an e-mail for distribution, if required.

## 4.5 Importing an evaluation form

**NOTE:** Specific terminology is used when navigating the tree pane to import an evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

- ▶ To import an evaluation form:
  1. In the tree pane, click the **Export and Import evaluation form**  button.
  2. Select **Import evaluation form** option from the drop down menu. The **Import Evaluation Form** dialog is presented.
  3. Do one of the following:

- Enter the filename for the evaluation form in the **Name** text box.
- Click the **Browse** button, browse to the location for the evaluation form and click the **Open** button.

4. Click the **OK** button.

5. A progress dialog is presented providing a summary of the evaluation form that is being imported.

6. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
- Once the import process is complete, click the **Close** button to close the dialog.

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**NOTE:** Imported evaluation forms are imported in a draft state.

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## 5 Creating and deleting question types

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This section covers the creation and deletion of all custom question types that are used within your evaluation forms.

Features within this section include:

- [Creating a new question type \(see page 10\)](#)
- [Editing a question type \(see page 11\)](#)
- [Deleting a question type \(see page 12\)](#)

### 5.1 Creating a new question type

When [adding a new question](#) (see page 18) for your evaluation form, you need to select what type of question it is (e.g. true/false or yes/no).

► To create a new question type:

1. Click the **Create new item**  button and select the **New Question Type** option from the drop down menu. The **New Question Type Wizard** opens at the **Welcome** screen.
2. Click the **Next** button and the **Question Type Details** screen is presented.
3. Enter the following details and where applicable use the text boxes provided:
  - **Name** - enter a name for the question type.

---

**NOTE:** The question type name **MUST** be unique.

- **Display mode** - select one of the following display modes:
  - **Radio button** - the option when answering this question in the evaluation form is displayed as a radio button.
  - **Drop down** - the option when answering this question in the evaluation form is displayed as a drop down menu.
- **Not applicable response text** - enter text for your not applicable answer to the question. Selecting this option skips the question. By default, this is set to N/A.

4. Click the **Next** button and the **Question Type Responses** screen is presented.
5. Click the **Add new response**  button and the **Add Response** dialog is presented.
6. Enter a response to the question and click the **Add** button. The dialog remains open for you to enter more responses. Once finished, click the **Close** button.

---

**NOTE:** You **MUST** add at least two responses.

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Each response **MUST** be unique.

7. Once added, you can edit, delete and reorder a response.
  - To edit, select the response from the list, click the **Edit response**  button and the **Edit Response** dialog is presented. Edit the response in the text box provided and click the **OK** button.
  - To delete, select the response from the list and click the **Delete response**  button.
  - To reorder, select the response from the list and use either the **Move selected response up**  button or the **Move selected response down**  button until the response is in the correct position in the list.
8. Once you have configured your responses to the question, click the **Next** button and the **Summary** screen is presented displaying the question type configuration.
9. Click the **Finish** button to exit the wizard.

## 5.2 Editing a question type

**NOTE:** Specific terminology is used when navigating the tree pane to edit a question type. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

You can only edit a question type if it meets the following requirements:

- If it is not one of the default question types. For a list of each default question type, refer to [Navigation panel](#) (see page 2).
- It is not currently being used by any evaluation forms. If it is, the question type is locked and the icon changes in the tree pane .

► To edit a question type:

1. In the tree pane, expand the **Question types**  node and select the question type to be edited. The right-hand pane updates with the details of the question type.
2. Edit one or more of the following details and where applicable use the text boxes provided:
  - **Name** - the name for the question type.

**NOTE:** The question type name **MUST** be unique.

- **Display mode** - select one of the following display modes:
  - **Radio button** - the option when answering this question in the evaluation form is a radio button.
  - **Drop down** - the option when answering this question in the evaluation form is a drop down menu.
  - **Slider** - the option when answering this question is a slider bar.
  - **Text box** - only displayed if the **Free text** question type is selected.

- **Not applicable response text** - the text for your not applicable answer to the question. Selecting this option skips the question. By default, this is set to N/A.

**NOTE:** The Not applicable response text option is disabled if you have selected the **Free text** Display mode option.

3. Within the **Responses** section, you can add, edit, delete and reorder your responses for the question type.

**NOTE:** The Responses section is disabled if you have selected the **Free text** Display mode option.

- a. To add a new response:

- (1) Click the **Add new response**  button and the **Add Response** dialog is presented.
- (2) Enter a response to the question and click the **Add** button. The dialog remains open for you to enter more responses. Once finished, click the **Close** button.

- b. To edit a response:

- (1) Select the response from the list, click the **Edit response**  button and the **Edit Response** dialog is presented.
- (2) Edit the response in the text box provided and click the **OK** button.

- c. To delete a response:

- (1) To delete, select the response from the list.
- (2) Click the **Delete response**  button.

- d. To reorder a response:

- (1) Select the response from the list.
- (2) Use either the **Move selected response up**  button or the **Move selected response down**  button until the response is in the correct position in the list.

4. On completion, click the **Save** button.

**NOTE:** Each response **MUST** be unique.

The changes to the question type are now saved.

## 5.3 Deleting a question type

**NOTE:** Specific terminology is used when navigating the tree pane to delete a question type. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

You can only delete a question type if it meets the following requirements:

- If it is not one of the default question types. For a list of each default question type, refer to [Navigation panel](#) (see page 2).

- It is not currently being used by any evaluation forms. If it is, the question type is locked and the icon changes in the tree pane .
- ▶ To delete a question type:
  1. In the tree pane, expand the **Question types**  node and select the question type to be deleted.
  2. Click the **Delete**  button. A message is presented confirming the deletion.
  3. Click the **Yes** button.

The question type is now deleted.

## 6 Configuring evaluation forms

This section covers the configuration of your evaluation forms.

**NOTE:** An evaluation form must only be edited by one user at a time.

Features within this section include:

- [Editing evaluation form details \(see page 14\)](#)
- [Configuring evaluation form questions and sections \(see page 15\)](#)
- [Adding a new section \(see page 16\)](#)
- [Editing a section \(see page 17\)](#)
- [Deleting a section \(see page 17\)](#)
- [Adding a new question \(see page 18\)](#)
- [Editing a question \(see page 20\)](#)
- [Deleting a question \(see page 21\)](#)

### 6.1 Editing evaluation form details

**NOTE:** Specific terminology is used when navigating the tree pane to edit evaluation form details. For help with this terminology, refer to [Tree structure terminology \(see page 3\)](#).

► To edit evaluation form details:

1. In the tree pane, expand the **Evaluations forms**  node and select the required evaluation form.
2. In the right hand pane, click the **General** tab and the **General** page is presented.
3. Edit one or more of the following details and where applicable use the text boxes provided:
  - **Name** - the name for the evaluation form.
  - **State** - the evaluation form state. Click the drop down arrow and select one of the following:
    - **Draft** - forms that are still being updated prior to being used for evaluations.
    - **Active** - forms that are completed and being used for evaluations.
    - **Retired** - forms that have been retired can no longer be used for new evaluations. Current evaluations that are using these forms are unaffected.
4. **Description** - the description for the evaluation form.

**NOTE:** A count is provided for the total number of evaluations that are using this evaluation form.

5. On completion, click the **Save** button.

The evaluation form details are now updated.

## 6.2 Configuring evaluation form questions and sections

**NOTE:** Specific terminology is used when navigating the tree pane to configure evaluation form questions and sections. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

- ▶ To configure evaluation form questions and sections:

1. In the tree pane, expand the **Evaluations forms**  node and select the required evaluation form.

**NOTE:** The evaluation form must be in the **Draft** status for you to make any configuration changes.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.

The Questions page provides a preview of how the sections and questions will appear in the evaluation form. The radio and drop down menus are available for selection for you to preview how the options will look. Answering any of the questions does not affect the evaluation form but provides a preview of the current and total score in the blue bar.

**NOTE:** The score preview is not displayed for information questions as they have an answer which has no score.

### Button bar

Table 6-1: Questions button bar

Button	Description
 ▾	<b>Add new question or section</b> - displays a drop down menu that allows you to create new section or question for your evaluation form.
	<b>Edit selected item</b> - edits the selected section or question.
	<b>Delete</b> - deletes the selected question or section. The button remains inactive when trying to delete a section that has questions within it.

Features within the Questions page include:

- [Adding a new section](#) (see page 16)
- [Editing a section](#) (see page 17)
- [Deleting a section](#) (see page 17)
- [Adding a new question](#) (see page 18)
- [Editing a question](#) (see page 20)
- [Deleting a question](#) (see page 21)

### List order controls

Use the list order controls to configure the layout of your sections and questions for your evaluation form.

Table 6-2: List order controls

Button	Description
	Moves the highlighted section or question to the top of the list.
	Moves the highlighted section or question up one place in the list.
	Moves the highlighted section or question down one place in the list.
	Moves the highlighted section or question to the bottom of the list.

## 6.3 Adding a new section

**NOTE:** Specific terminology is used when navigating the tree pane to add a new section for the selected evaluation form. For help with this terminology, refer to [Tree structure terminology \(see page 3\)](#).

You must have at least one section created in order to be able to add questions for your evaluation form. To add a question, refer to [Adding a new question \(see page 18\)](#).

► To add a new section:

1. In the tree pane, expand the **Evaluations forms**  node and select the evaluation form that you are adding the section to.

**NOTE:** The evaluation form must be in the **Draft** status for you to be able to add a section.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.
3. Within the **Questions** page, click the **Add new question or section**  button and select **New Section** from the drop down list. The **New section** dialog is presented.
4. Enter the following details using the text boxes provided:
  - **Name** - the name for the new section.
  - **Description** - the description for the new section.

**NOTE:** The description text is available when hovering your cursor over the section in the evaluation form.

5. Click the **OK** button.

The new section is added to the evaluation form.

## 6.4 Editing a section

**NOTE:** Specific terminology is used when navigating the tree pane to edit a section for the selected evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

- ▶ To edit a section:

1. In the tree pane, expand the **Evaluations forms**  node and select the evaluation form that has the section which requires editing.

**NOTE:** The evaluation form must be in the **Draft** status for you to be able to edit the section.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.
3. Locate the section and select it. Once selected, the section header bar turns blue.
4. Click the **Edit the selected item**  button and the **Edit Section** dialog is presented.
5. Edit one or more of the following details using the text boxes provided:
  - **Name** - the name for the new section.
  - **Description** - the description for the new section.

**NOTE:** The description text is available when hovering your cursor over the section in the evaluation form.

6. Click the **OK** button followed by the **Save** button.

The section is now edited.

## 6.5 Deleting a section

**NOTE:** Specific terminology is used when navigating the tree pane to delete a section for the selected evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

- ▶ To delete a section:

1. In the tree pane, expand the **Evaluations forms**  node and select the evaluation form that has the section which requires deleting.

**NOTE:** The evaluation form must be in the **Draft** status for you to be able to delete the section.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.

3. Locate the section and select it. Once selected, the section header bar turns blue.
4. Click the **Delete selected item**  button followed by the **Save** button.

The section is now deleted.

**NOTE:** You **CANNOT** delete a section that has questions within it. In this instance, the **Delete selected item**  button is unavailable for selection.

## 6.6 Adding a new question

**NOTE:** Specific terminology is used when navigating the tree pane to add a new question for the selected evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

► To add a new question:

1. In the tree pane, expand the **Evaluations forms**  node and select the evaluation form that you are adding the question to.

**NOTE:** The evaluation form must be in the **Draft** status for you to be able to add a question.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.
3. Within the **Questions** page, click the **Add new question or section**  button and select **New Question** from the drop down list. The **New Question Wizard** opens at the **Welcome** screen.
4. Click the **Next** button and the **Question Details** screen is presented.
5. Enter the following details and where applicable use the text boxes provided:
  - **Select section** - click the down arrow and select the section that this question applies to from the list.
  - **Question text** - enter the text for the question.
  - **Description** - enter a description (if required) for the question.

**NOTE:** The description text is available when hovering your cursor over the question in the evaluation form to help you answer the question.

- **Question type** - click the down arrow and select the question type for this question from the list.
- **Information question** - a question that has an answer which has no score e.g. a department name or officer ID.
- **Scoring question** - a question that requires a score. Once selected, the following options are enabled:

- **Maximum points for question** - enter the maximum number of points for this question. The score entry is assisted by using the up/down arrows. The entry cannot be less than 1 or more than 1000.
- **Points for question failure** - in the event that this question is scored as failed, enter the points for the question failure. The score entry is assisted by using the up/down arrows. The entry cannot be less than -1000 or more than 0.

---

**NOTE:** The Maximum points for question option is disabled if you have selected the Information question or Free text question type.

The maximum score **CANNOT** be less than 1 or more than 1000.

---

6. Click the **Next** button and the **Customize Responses** screen is presented.

---

**NOTE:** The Customize Responses screen is unavailable if you have selected the Free text question type.

---

7. Check the **Include not applicable response** box to add an extra response option that skips this question. The text for this response is customizable when [creating a new question type](#) (see page 10).

---

**NOTE:** If this response is selected during an evaluation, the question being answered does not contribute towards the evaluation final percentage score. Therefore, you cannot update the response details for this option.

---

8. Select each response from the table and configure the following options:

- **Failure (negative score)** - the selected response triggers a failure for this question. This value is the **Points for question failure** set in the **Question Details** page.
- **Percentage of maximum points** - enter the percentage of the maximum points for this question in the text box provided. The percentage entry is assisted by using the up/down arrows.
- **Conditional action** - Set the conditional action for this response. The available options are:
  - **None** - no conditional action is required for the response. This is the default conditional option.
  - **Skip section** - select this response when answering the question and all remaining questions in this section of the evaluation form are skipped.
  - **Skip form** - select this response when answering the question and all remaining questions in the evaluation form are skipped.

9. Click the **Next** button and the **Summary** screen is presented displaying the question configuration.

10. Click the **Finish** button to exit the wizard.

The question is now added to the evaluation form.

## 6.7 Editing a question

**NOTE:** Specific terminology is used when navigating the tree pane to edit a question for the selected evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

► To edit a question:

1. In the tree pane, expand the **Evaluations forms**  node and select the evaluation form that has the question which requires editing.

**NOTE:** The evaluation form must be in the **Draft** status for you to be able to edit the question.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.
3. Locate the question and select it. Once selected, the question background color turns blue.
4. Click the **Edit the selected item**  button and the **Edit Question** dialog is presented.
5. Edit one or more of the following details and where applicable use the text boxes provided:
  - **Select section** - the section that this question applies to. To edit, click the down arrow and select the section from the list.
  - **Question text** - the text for the question.
  - **Description** - the description for the question.

**NOTE:** The description text is available when hovering your cursor over the question in the evaluation form to help you answer the question.

- **Information question** - a question that has an answer which has no score e.g. a department name or officer ID.
- **Scoring question** - a question that requires a score. Once selected, the following options are enabled:
  - **Maximum points for question** - enter the maximum number of points for this question. The score entry is assisted by using the up/down arrows. The entry cannot be less than 1 or more than 1000.
  - **Points for question failure** - in the event that this question is scored as failed, enter the points for the question failure. The score entry is assisted by using the up/down arrows. The entry cannot be less than -1000 or more than 0.

**NOTE:** The Maximum points for question option is disabled if you have selected the Information question or Free text question type.

The maximum score **CANNOT** be less than 1 or more than 1000.

6. Click the  button to expand the **More Options** section.

**NOTE:** If you have selected the Information question option, the More options section is disabled apart from the Conditional Action option.

If you have selected the Free text question type, the More options section is completely disabled.

7. Click the **Include not applicable response** box to add an extra response option that skips this question. The text for this response is customizable when [creating a new question type](#) (see page 10).
8. Select each response and edit one or more of the following:
  - **Failure (negative score)** - the selected response triggers a failure for this question. This value is the **Points for question failure** setting.
  - **Percentage of maximum points** - the percentage of the maximum points for this question. Edit the percentage in the text box provided. The percentage entry is assisted by using the up/down arrows.
  - **Conditional action** - the conditional action for this response. The available options are:
    - **None** - no conditional action is required for the response. This is the default conditional option.
    - **Skip section** - select this response when answering the question and all remaining questions in this section of the evaluation form are skipped.
    - **Skip form** - select this response when answering the question and all remaining questions in the evaluation form are skipped.
9. Click the **OK** button followed by the **Save** button.

The question is now edited.

## 6.8 Deleting a question

**NOTE:** Specific terminology is used when navigating the tree pane to delete a question for the selected evaluation form. For help with this terminology, refer to [Tree structure terminology](#) (see page 3).

► To delete a question:

1. In the tree pane, expand the **Evaluations forms**  node and select the evaluation form that has the question which requires deleting.

**NOTE:** The evaluation form must be in the **Draft** status for you to be able to delete the question.

2. In the right hand pane, click the **Questions** tab and the **Questions** page is presented.

3. Locate and expand the section that the question belongs to by clicking the  button.
4. Locate the question and select it. Once selected, the question background color turns blue.
5. Click the **Delete selected item**  button followed by the **Save** button.

The question is now deleted.

## ABOUT NICE

NICE (NASDAQ: NICE) is the worldwide leader of software solutions that deliver strategic insights by capturing and analyzing mass quantities of structured and unstructured data in real time from multiple sources, including phone calls, mobile apps, emails, chat, social media, and video. NICE solutions enable organizations to take the Next-Best-Action to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies. [www.nice.com](http://www.nice.com)

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