Webinar: 27 February 2024

Using form calculations

Questions & Answers

Q: **Would you put the 'score total' & 'weighted score' at the top of the page rather than the bottom?**

A: You certainly could! This would depend on your form design and what would work best for your process.

Q: **Are there sample form templates available for these assessment and admin forms?**

A: There are a couple of Sample Forms that are similar to this one that you can access in your accounts. When you create a new form, make sure to select "Copy a sample form template". There are two example Assessment forms and one Administration form in there for you to use in your account and edit if you wish.

Q: **How can you do a SUM or Average calculations with fields from the same form? The option only comes up when you look at other forms**

A: Where multiple responses are present within one form, you can also use a SUM or Average function. These will automatically appear when selecting fields within the edit calculation function.

Q: **Can you capture comments from all instances of the assessment form in the Admin form?**

A: You can only calculate currency or number fields across forms. Standard Field questions can be pulled across into subsequent forms as a Read Only version. However, multiple instances of these comments (or any written fields) cannot be brought across to another form, as they would overwrite each other. You would need to create a custom report and pull out the assessor's comments this way.

Q: **Is there a way to have a "N/A" option for assessors that will not create an issue when calculating a Score Total?**

A: To mitigate any issues with assessors not adding data that can be calculated, you could make your scores a Choice based question, which means they have to select a response from the options provided. These options would need to be numerical so they can be calculated of course (I.e. using 0 as a choice in this case).

Q: **Is it possible to do a bulk task to calculate the "Decision Management" of a bunch of applications?**

A: There is no bulk action within the system to do so, and this is because you are able to create custom reports in order to generate this information. The calculation would then be done in Excel.

Q: Can you export all the results of the Admin Form to Excel, so you can see all the scores together?

A: Absolutely! You can use the Round Snapshot Report which will generate an Excel spreadsheet of all of your application records and form responses within the round. Alternatively, you can create your own custom report template within the system of these fields, which can then be exported as an Excel spreadsheet.

Q: Can external assessors be given access to an internal admin form for scoring moderation?

A: The Assessor User Access level within the system cannot be given access to internal administration forms. If you needed to give external assessors access to administration forms, you would need to update their access level to Program Specific. Note this would give them access to other tabs within the application record.

Feedback Comments

Can the calculation field be better clickable, not just with the option to delete all or just the last? If you make one mistake in the middle somewhere you have to delete quite a lot instead of being able to just correct it in the spot.

Currently, the only way to delete a field within the edit calculation function is to either 'Clear All' or 'Delete' the last fields. I understand having a more granular level of control in the calculation field would greatly enhance user experience. Particularly, allowing users to click on specific parts of the calculation to edit them. We will have logged your suggested improvement with our development team. Please note that we cannot guarantee whether the suggestion will be implemented or give any indication of the time frame for future implementation.