



## Evaluation and Review Module

# Streamline internal reviews and exercises

## Evaluation and Review Module

# Understanding the Exercise form

The Exercise form is an online form that is created by administrators and made available to users of the Module to complete. It is created as part of the process of configuring an Exercise. The form can move through different stages, providing granular control over access and permissions.



The form is designed to reduce the need for time consuming manual entry by allowing data from Elements to be added at the click of a button. This information



can then be enriched with supporting information and attachments, allowing a rich set of data to be captured from users.

When the form is moved into a stage where reviewers can gain access, reviewers are able to view the information returned by a researcher and add comments, scores and attachments, as required.

Understanding how the form is constructed will help you quickly create a form that suits your specific organisational requirements.

### Tip:

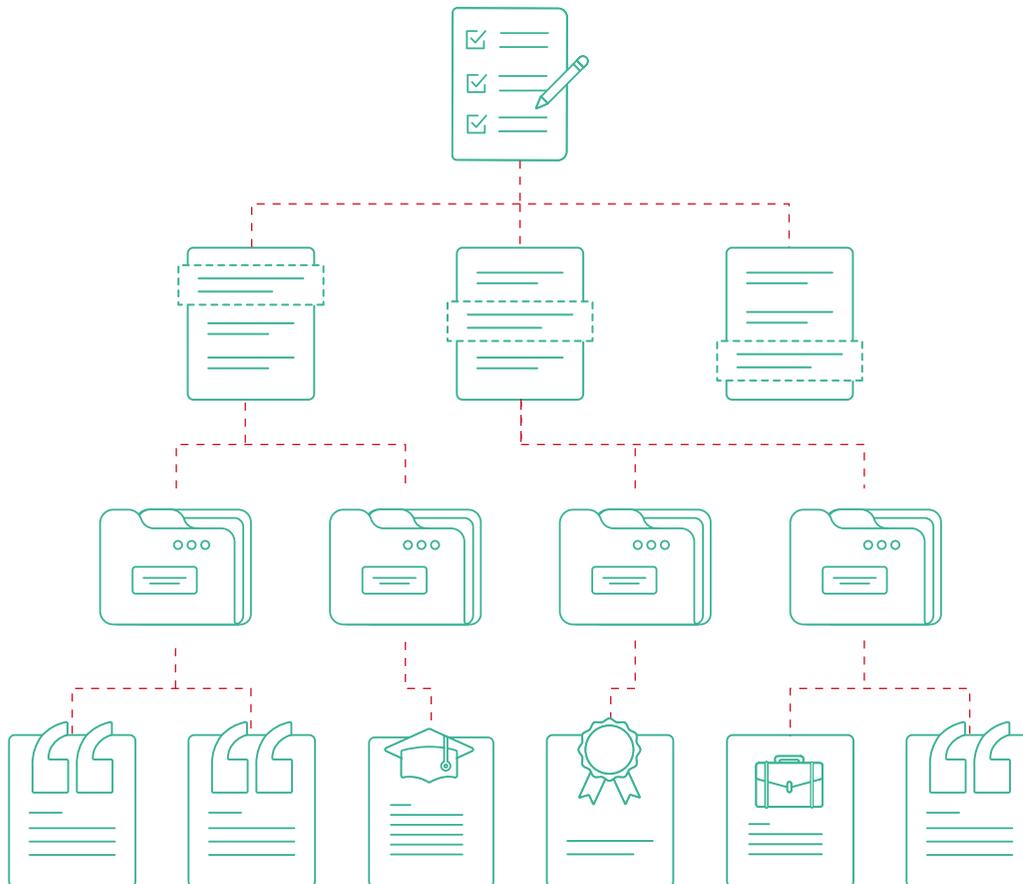
When creating the Exercise form, you can add yourself as a researcher and reviewer of the Exercise form. This allows you to observe how the form will appear to Module users, as you adjust the configuration.

# The Exercise form hierarchy

The Exercise form consists of four different 'components'. Understanding how each of these behave, and how they work together, will help you build an Exercise form that is easy for users to navigate and interact with.

All components support the addition of supporting fields, attachments and reviews.

Overview and guidance text can be added to many of the form components to provide users with the context and instructions required to complete the form.



## Exercise

The Exercise component acts as the container for all other components. Supporting fields, attachments and reviews added to the Exercise are displayed in their own section.

## Sections

Sections are used to group related information within the form. Each section can contain zero or more lists. A section containing no lists must include supporting fields, attachments or reviews in order for it to be viewable.

## Lists

Lists are used to allow users to add an ordered list of items to the form. It is possible to configure lists so that they are pre-populated based on a predetermined set of criteria when the user starts their Exercise.

## Items

Items are added to lists by users and can either be the user's outputs and activities already present in the system, or they can be 'custom field' items, which consist of a set of fields configured by the Exercise administrator.

# Display of form components

The 'Introduction' page is always displayed and shows the overview and guidance text configured for the Exercise component.

The 'Overview' page will always be shown and shows a summary of all sections and all section content. Users can navigate to sections from the Overview page or using the Navigator on the left-hand side.

Supporting fields, attachments and reviews added to the Exercise component will be displayed in their own section. In this case, the display name for the section has been set to 'Personal information'

This section contains two lists, and supporting fields.

This list includes items, supporting fields and attachments

## Tip:

When creating the Exercise form, you can add yourself as a researcher and reviewer of the Exercise form. This allows you to observe how the form will appear to Module users, as you adjust the configuration