Custom iForms

iCIMS iForms Guide

VELOCITY

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Introduction

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iForms are electronic forms used in iCIMS Applicant Tracking (ATS) and iCIMS Onboarding to capture additional candidate, employee, or hiring organization data. These forms support your hiring and HR workflows in the iCIMS platform, and can replace existing paper forms. iForms are divided into three types: Standard, Custom, and Acknowledgement forms. This document focuses building and maintaining the Custom forms.

For additional information regarding the other two form types please contact your Velocity CSM.

2. Custom iForm Overview

Unlike Standard iForms, you decide the precise content and fields for the Custom iForm. Custom iForms are associated with four different data types and can be used to support their corresponding workflows: Person, Recruiting Workflow, Job, and Onboarding Workflow. The data collected on these forms can come in one of two answer types: Public or Private. By combining the different form associations with public and private answer types you can create Custom iForms to support almost every aspect of your hiring and onboarding workflows. Some examples include:

	Public	Private
Person	Employment applications Enrollment forms	
Recruiting W.	Offer letters	Interview feedback forms Reference verification forms
Job	Job approvals	Hiring manager - recruiter satisfaction surveys
Onboarding W.	New hire checklists	

3. Profile Associations

Person

Person iForms are used to capture non-job-specific information about an individual. These iForms are accessible from the iForms Tab of a Person profile and can only pull information from the associated Person profile. Examples of Person iForms include but are not limited to:

- Employment applications
- Background checks
- Direct deposit forms
- Enrollment forms

Recruiting Workflow

Recruiting Workflow iForms are used to capture job-specific and recruiting workflow information about an individual and are accessible from the iForms Tab of the Recruiting Workflow profile. They can pull information from the associated Recruiting Workflow, Person and Job profiles. Examples include but are not limited to:

- Offer letters
- Interview feedback forms

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- Offer letters
- Interview feedback forms

4. Answer Types

Public

iForms that use public answers can be seen or edited by any individual that has access, and completed forms exist as a single instance. Any subsequent edits or updates that are made to the form will overwrite the previous version. Public answers can be reported on in many types of searches, such as Person or Recruiting Workflow searches. Most iForms use public answers, commonly including:

- Employment Applications
- Background Check forms
- Direct Deposit forms
- Enrollment forms and Tax forms.

Private

iForms that use private answers allow multiple individuals to each provide their own answers on a unique instance of the form. Private answers can only be reported on using iForm or iForm Response searches. A common use case is interview feedback forms, allowing each panel interview participant to provide their own feedback.

5. Requesting a new/updated iForm

STEP 1

On the iCIMS Community, create a case for a new custom iForm by selecting Support/Create a Case and the following screen will display as follows:

Contact Customer Support

Tell us how we can help.

* Product

Applicant Tracking System

* Type (TS)

Configuration Change Request

* Category (TS)

iForm

Sub-Category (TS)

Modification

* Subject

Update our custom Employment Application in Production & Test

* Description

Please update our custom Employment Application form in Production & Test. These modifications are outlined in the attached file and let me know if you have any questions.

* Business Impact

Moderate

5. Requesting a new/updated iForm

STEP 2

As per the screenshot above, fill in the form with as much detail as possible. Fields marked with a red * are required. For the Description field, try to include:

- iForm Name
- The Profile Association for your new iForm
- The Answer Type for your new iForm
- And, where applicable, outline: required fields, pre-population or syncing, sections, group loops, dependencies, Login groups permissions, task(s) to be created, and if you are adding the new iForm to an existing iForm packet or a new iForm packet

If a similar iForm already exists and you would like your new one built with similar configurations, please provide this information in the Description (eg. Name of the existing form, if you want field types and pre-population mirrored, etc.).

STEP 3

Upload the base document for your new iForm in a Microsoft Word format. The file also needs to be unprotected and fully editable/accessible when the iForm developer opens it.

Note

To update an existing form instead of creating a new one follow the same steps above, making sure in the subject and description to provide sufficient details so the iCIMS teams know what form is being edited and what changes are required.

6. Self-service access

To create or update your own Custom iForms, you first need to request Self-Service access to the iForms tool as follows:

1. Your System Admin creates an iCIMS Community case; do not use the chat. (See screenshot below for details.)
2. The TSE will send the System Administrator a waiver to sign.
3. Your System Administrator must sign and return the waiver.
4. The TSE will enable self-service for the designated user groups (typically User Admin group).

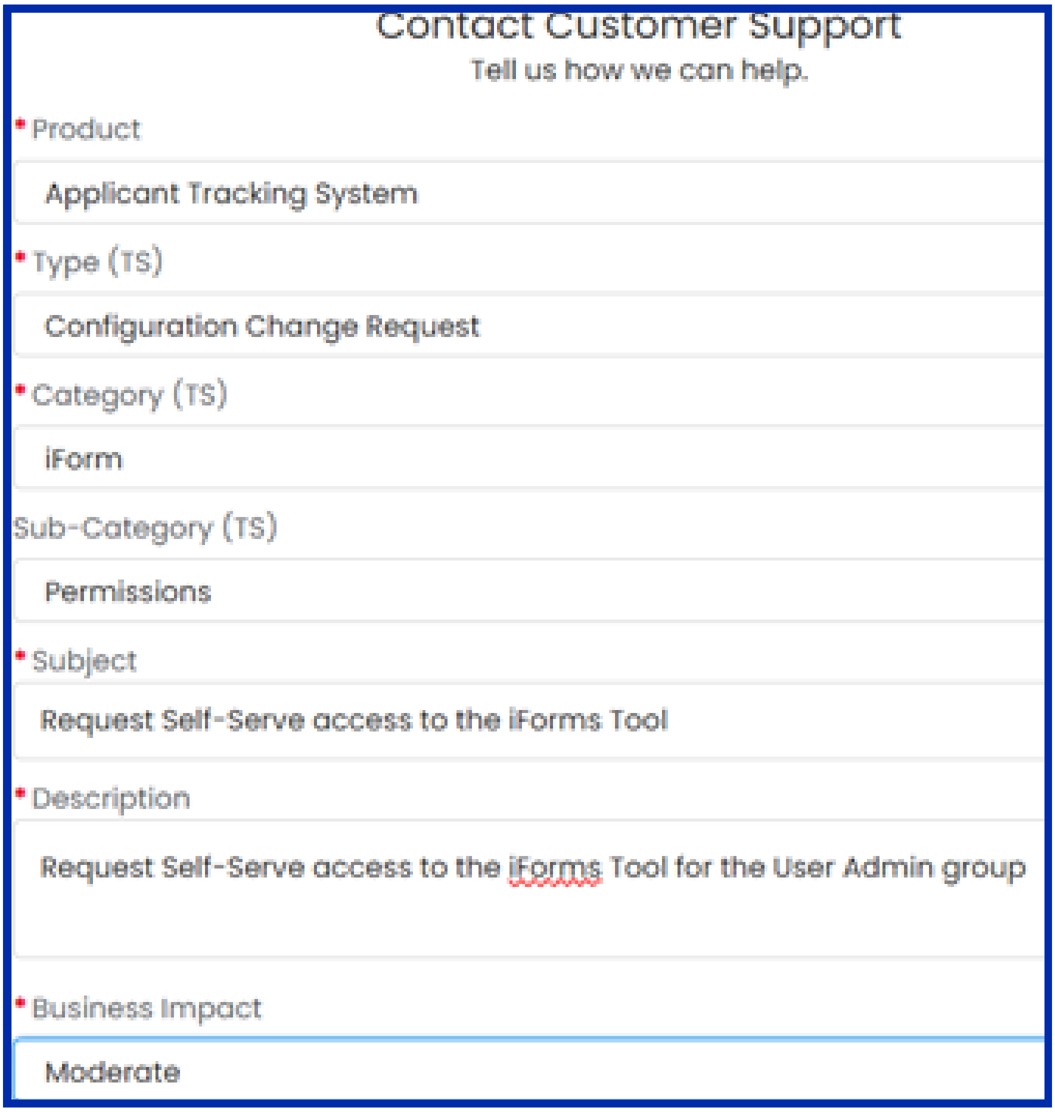
Creating/updating custom iForms often requires the use of HTML, CSS, and Javascript, so we recommended that you only use the Self-Serve tool to perform simple builds and updates. If more complex work is required please contact Velocity or iCIMS Support and one of our iForms experts can assist you. We recommend you contact us if any of the following apply:

- The edits exist in group loops.
- The edits affect field dependencies.
- The fields being edited are "synced".
- The form is mobile-friendly (e.g. Employment Applications).
- The changes involve adding or removing columns.
- New fields require setup for pre-population or syncing.
- The edits are related to font type or font size.

6. Self-service access

For more information on how to create and update your own Custom iForms, go to the iCIMS Community to locate various training videos and articles.

Sample self-service access request


Contact Customer Support

Tell us how we can help.

* Product

Applicant Tracking System

* Type (TS)

Configuration Change Request

* Category (TS)

iForm

Sub-Category (TS)

Permissions

* Subject

Request Self-Serve access to the iForms Tool

* Description

Request Self-Serve access to the iForms Tool for the User Admin group

* Business Impact

Moderate

7. Troubleshooting

Issues you can resolve on your own

Regardless of whether you have self-service enabled, there are some form issues that you will be able to resolve yourself. Please note however that if self-service is not enabled, you're still need an iCIMS support ticket to upload the corrected form.

1. Defining or updating field pre-population
    - If you are familiar with the iCIMS field structure, you can define basic pre population and field mapping (e.g., employee name) in the custom iForm.
    - For updates requiring syncing or other advanced configuration, please contact Velocity or iCIMS support.
2. Defining or updating required fields
    - The “Required” field setting is available directly in the Questions Tab and is highly intuitive, allowing you to define or update required fields with ease.

7. Troubleshooting

Issues Velocity or iCIMS will need to resolve

Many issues with your forms will require proficiency in HTML, CSS, JavaScript, or advanced platform knowledge. In the examples below, or with other similar issues you will need support from velocity or the iCIMS team to resolve.

1. When I add/remove columns on my iForm, the width of the other columns automatically adjust and I'm not able to fix them
2. How can I make my iForm mobile friendly?
3. My iForm originally contained dependency logic and after updating my iForm in the View tab, the dependency logic no longer works.
4. My iForm originally contained group loops and after updating my iForm in the View tab, the group loops no longer work.
5. Syncing on my iForm stopped working.

For more information please visit us at:

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