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ELEVATING TECHNOLOGY SOLUTIONS



formedit

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Form Editor 1

Form Editor

txConnect Admin > Administrator Options > Settings > Forms Management > Forms (then click spyglass icon)

This page allows you to change settings for a selected form, such as adding the fields to the form, assigning a “friendly” name, and determining the order in which the fields are displayed. This page can only be accessed by selecting a form from the Form Management page.

Edit a form:

1. From the Forms Management page, select Forms from the menu. The Form Management page is displayed.
2. Under **Available Forms**, click under **Options** for the form you want to manage.

Below are instructions for **New Student Enrollment Forms** and **All Other Dynamic Forms**, as well as **Static Forms** (scroll down). Standard forms cannot be edited or deleted.

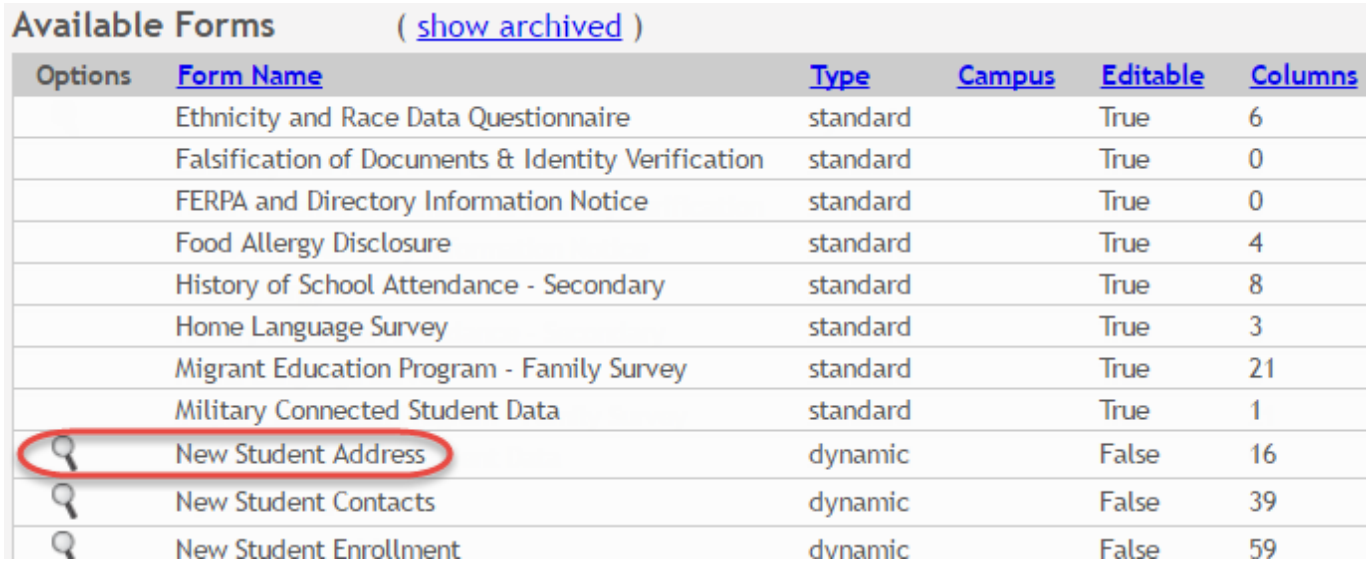
New Student Enrollment Forms

New Student forms are dynamic forms used specifically for the new student enrollment process. Several *New Student* forms are included automatically and already have columns (i.e., fields) added.

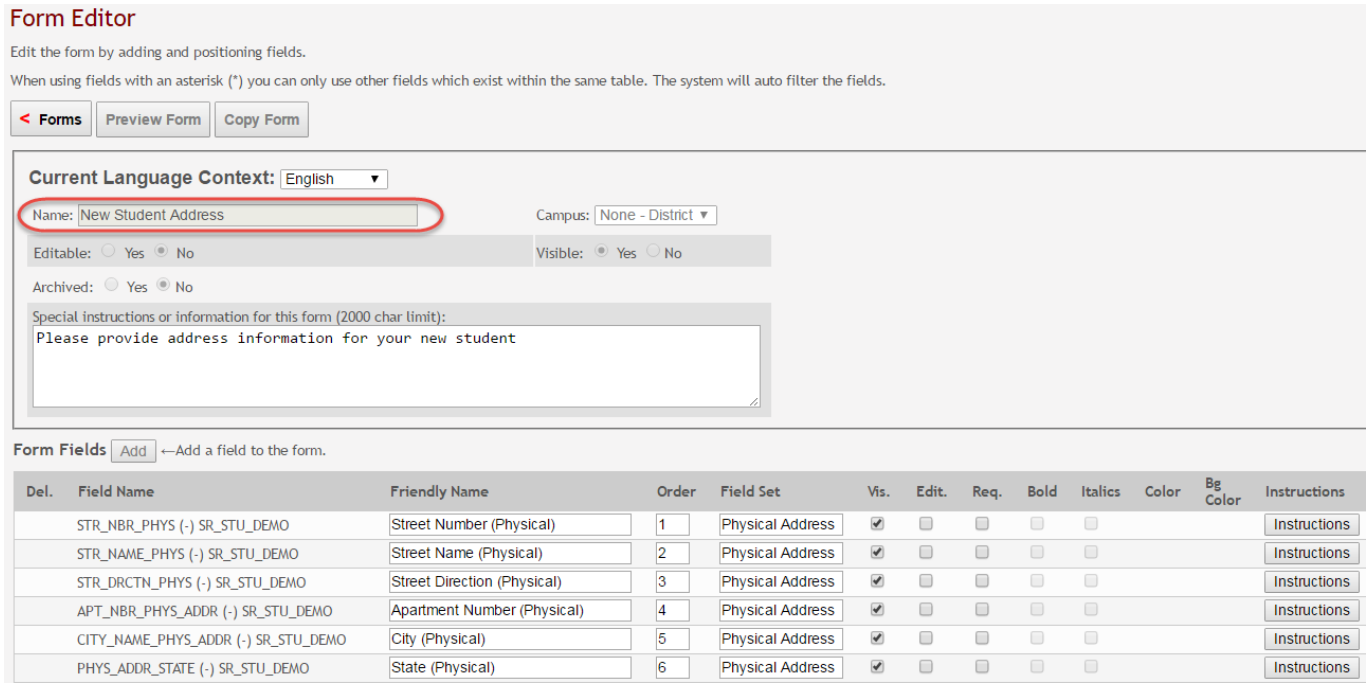
- New Student Address
- New Student Contacts
- New Student Enrollment

These forms cannot be deleted or renamed; however, you can modify some of the default settings for each form column.

To edit a *New Student* form, click under **Options**.



The form opens on the Form Editor page where you can make changes.

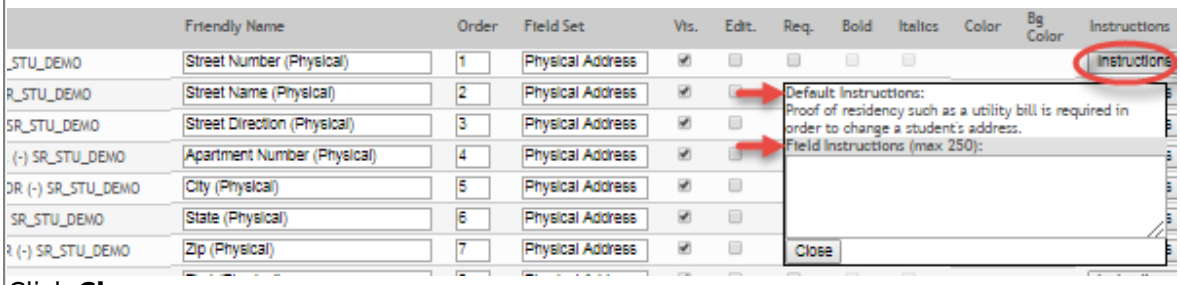


The **Name**, **Campus**, **Editable**, and **Visible** fields display the default information and cannot be changed. Also, these forms cannot be archived.

Current Language Context	Select the language of the form you are editing.
Special Instructions or information for this form	Type any specific instructions for the form, up to 2000 characters, in the selected language.

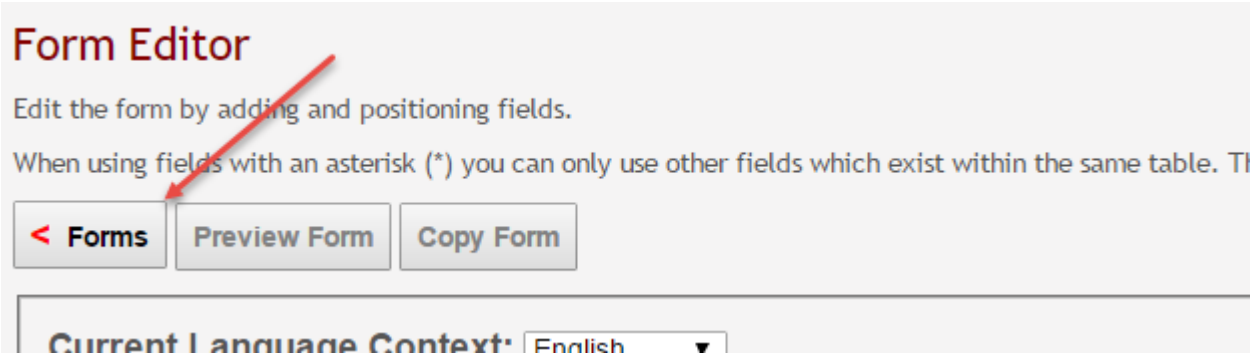
You cannot add columns to a *New Student* form; the **Add** button is disabled. However, you can modify the following settings for existing columns:

Friendly Name	The default friendly name is displayed. If you selected *Spanish* for **Current Language Context**, the default friendly names are Spanish. Modify the name as needed, up to 50 characters.
Order	Indicate the order in which you want the fields to be displayed on the form. For example, type 1 if you want to field to be displayed at the top of the form.

Field Set	Use this column to group related fields together in the form. For example, you could type “Mailing Address” for all fields that are related to the student’s mailing address. The fields that you want to physically group together should also be together as indicated by the **Order** field. The fields with the same **Field Set** are grouped together in a box, but only if they are adjacent in the order. The box is drawn around one or more sequential fields that have a **Field Set** specified. The field set should be typed in the language selected in **Current Language Context**. If a Spanish field set name is not provided, the English field set name will be displayed even if the parent is viewing txConnect in Spanish.
Vis	Select if you want the field to be visible to parents on the form. Clear the check box if you do not want the field visible to parents. For example, you can hide the four-digit zip code extension. The setting of this field overrides all other visibility settings.
Edit	Select to allow parents to update data in this field from the form. • If selected, the form field will be editable, but only if the field is also set to **Updateable**=*true* on the Form Field Management page. • If *not* selected, this will override the other setting, and the form field will not be editable. • This setting does not apply to *New Student* forms.
Req	Select if the field is required of the parents. If this field is selected, be sure **Edit** is also selected.
Instructions	Click the button to view any existing default instructions and add additional instructions for the field. A pop-up window opens.  Click **Close**.

Click **Save**.

Click **< Forms** to return to the Form Management page.



All Other Dynamic Forms:

Only static and dynamic forms can be modified or deleted. Default forms cannot be deleted, and only some fields can be updated.

On the Form Editor page:

Current Language Context	Select the language of the form you are editing.
Name	The form name is displayed as entered in the previous step. Modify the field if necessary. The name should be typed in the language selected in **Current Language Context**. If a Spanish name is not provided, the English name will be displayed even if the parent is viewing txConnect in Spanish.
Campus	The campus is displayed as entered in the previous step. Modify the field if necessary. • Select a campus if the form is specific to one campus. • Select *None - District* if the form is for all campuses in the district.
Editable	• *Yes* - The fields on the form will be editable. • *No* - The fields on the form will not be editable.
Visible	The setting entered on the previous page is displayed, indicating if the form is visible to parents in txConnect. Modify the setting if necessary.
Archived	• *Yes* - Archive the form, which allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes. • *No* - Do not archive the form. Archived forms are *not* visible to parents in txConnect. New Student Enrollment forms cannot be archived.
Special Instructions or information for this form	The text box displays any text entered on the previous page. Modify the text if necessary, up to 2000 characters.

Form Fields

Field Name
Select the table-field you want to add to the form. The drop down lists all possible fields, including the field name, sequence number (if applicable), and table name. Once you select a table-field, all subsequent fields that you add to the form must come from the same type of table (either vertical with multiple records, or single record). The drop-down list in the subsequent rows will filter out the tables that can no longer be selected based on the selection in the first row. • A hyphen indicates a flat (single-record) table. • An asterisk indicates a vertical (multi-record) table.

For vertical table, some fields are mandatory, and they will automatically be added to the form even if you do not select them.

Mandatory fields:

Table	Mandatory Fields
SR_PARENT	NAME_L NAME_F NAME_M
SR_HLTH_MED_COND	MED_COND_CD
SR_STU_RESTRICT	STU_RESTRICT_CD STU_RESTRICT_CATEG_CD (iTCCS only)
SR_DEMO	PAR1_NAME_L PAR1_NAME_F PAR1_NAME_M PAR2_NAME_L PAR2_NAME_F PAR2_NAME_M
SR_DEMO_CONTACT	NAME_L NAME_F NAME_M SEQ_NBR (iTCCS only)

Form field edits:

The following fields will have edits when used on a dynamic form:

• If a column has a DATA_TYP of STATE in DR_ORD_OPT_TYP, the entry will appear as a drop-down list with all of the US states, territories, and insular areas spelled out. When one is selected, the standard two-character postal abbreviation is stored in the table.

• If a column has a DATA_TYP of NUMERIC in DR_ORD_OPT_TYP, the data entered by the user is checked to ensure that there are no invalid characters. It allows either all numbers or spaces. No alpha or special characters are allowed.

• If a column has a DATA_TYP of DATE in DR_ORD_OPT_TYP, the data is masked to force the format MM/DD/YYYY and checked to verify that it is a valid date. For example, 02/31/1995 is not a valid date, even though it is numeric and in the correct format.

• For a DATA_TYP of AREACODE, the data is masked to force the format ###.

• For a DATA_TYP of PHONENUM, the data is masked to force the format ###-####.

• For a DATA_TYP of ZIP5, the data is masked to force the format #####.

• For a DATA_TYP of ZIP4, the data is masked to force the format ####.

• For a DATA_TYP of SSN, the data is masked to force the format ###-##-####.

• In any cases where there are special characters in the display mask on the page, the characters are removed before saving to the SR_ORD table. Also, the date is reformatted to the format YYYYMMDD before saving.

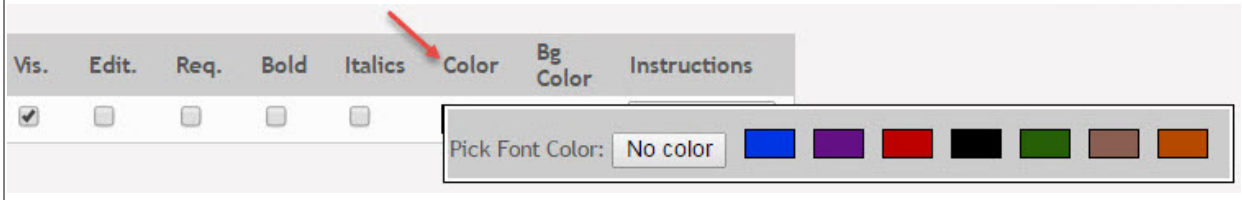
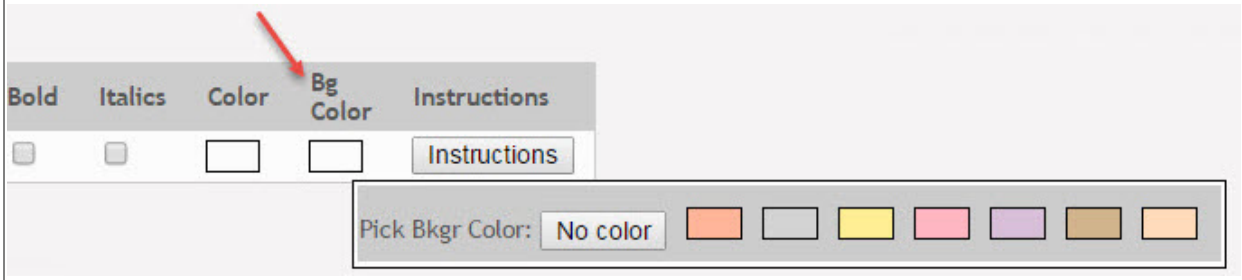
• For a DATA_TYP of EMAIL, the data is checked to ensure that it fits a standard email format. It must have at least one character before an "@" symbol, at least one character between the "@" and the final period, and at least two characters after the final period. For example, the smallest email address that would be considered valid is a@b.cd. There can be multiple periods in the address (e.g., first.last@email.net).

• If a column has an HTML_TYP of DROPDOWN and includes the name of a lookup table, lookup ID, and value fields, the drop down is populated from that table.

• If a column has an HTML_TYP of RADIO_YN, it displays as ○Y ○N.

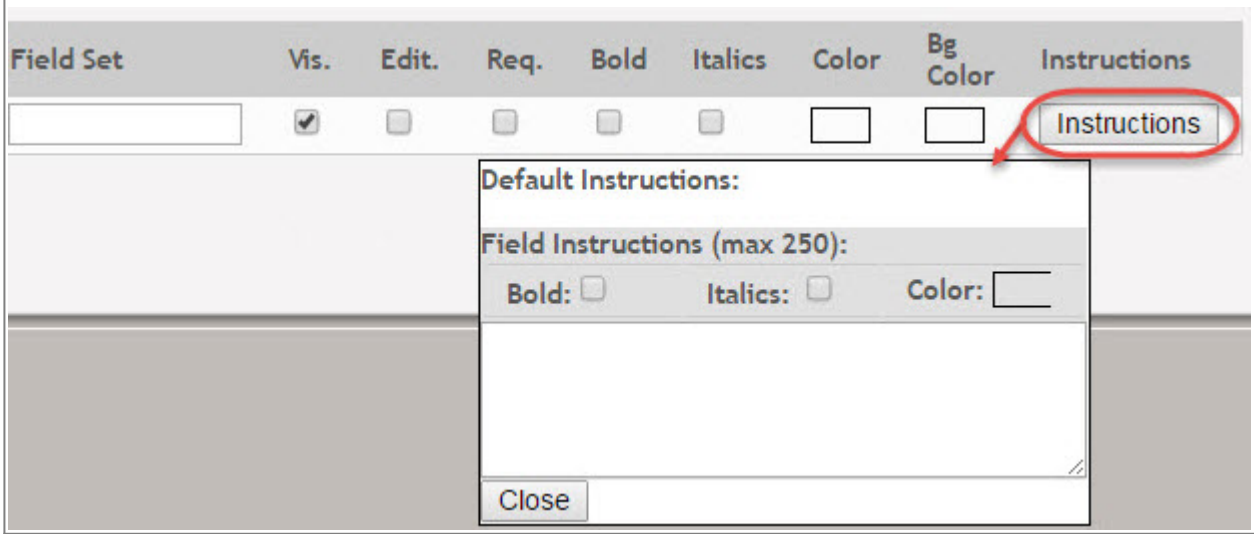
• If a column has an HTML_TYP of TEXT, and a FLD_LEN is given, the text entered into the field is limited to the number of characters specified in FLD_LEN.

Friendly Name	The default friendly name is displayed. If you selected *Spanish* for **Current Language Context**, the default friendly names are Spanish. Modify the name as needed, up to 50 characters.
Order	Indicate the order in which you want the fields to be displayed on the form. For example, type 1 if you want to field to be displayed at the top of the form.
Field Set	Use this column to group related fields together in the form. For example, you could type "Mailing Address" for all fields that are related to the student's mailing address. The fields that you want to physically group together should also be together as indicated by the **Order** field. The fields with the same **Field Set** are grouped together in a box, but only if they are adjacent in the order. The box is drawn around one or more sequential fields that have a **Field Set** specified. The field set should be typed in the language selected in **Current Language Context**. If a Spanish field set name is not provided, the English field set name will be displayed even if the parent is viewing txConnect in Spanish.
Vis	Select if you want the field to be visible to parents on the form. Clear the check box if you do not want the field visible to parents. For example, you can hide the four-digit zip code extension. The setting of this field overrides all other visibility settings.
Edit	Select to allow parents to update data in this field from the form. • If selected, the form field will be editable, but only if the field is also set to **Updateable**=*true* on the Form Field Management page. • If *not* selected, this will override the other setting, and the form field will not be editable. • This setting does not apply to *New Student* forms.
Req	Select if the field is required of the parents. If this field is selected, be sure **Edit** is also selected.
Bold	Select if you want the field to be displayed in a bold font.
Italics	Select if you want the field to be displayed in an italic font.

Color	Click the box to select a color for the field text, if you prefer a color other than black. A pop-up window opens that provides seven color choices, as well as the option for no color (i.e., black).  Click a color to select it, and the window closes.
Bg Color	Click the box to select a background color for the field. A pop-up window opens that provides seven background color choices, as well as the option for no color.  Click a color to select it, and the window closes. The form is automatically shaded with an alternating (light/dark) gray background when displayed for parents in txConnect. If you do not select a color, or if you select **No Color**, the background will be gray.

Instructions

Click the button to view any existing default instructions and add additional instructions for the field. A pop-up window opens.

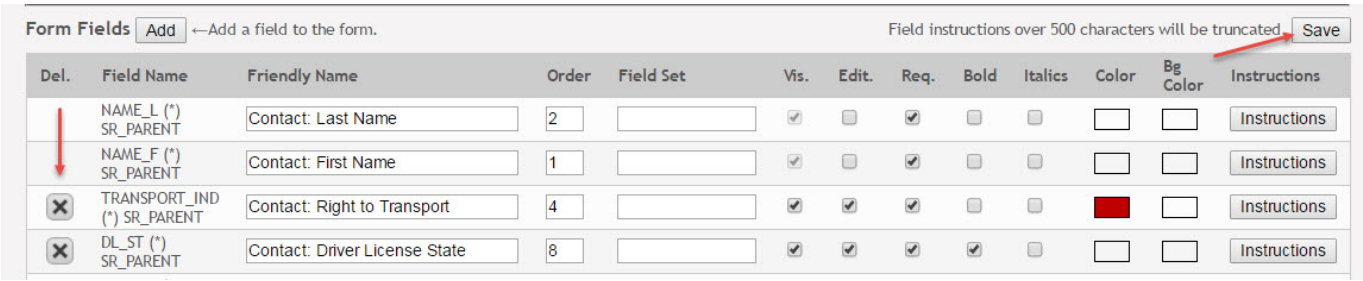


Default Instructions	Any instructions entered on the Form Field Management page are displayed. They cannot be changed here.
Field Instructions	Add or update any additional instructions for the field. These instructions will be appended to the **Default Instructions** when the parent accesses the form in txConnect.
Bold	Select if you want the instructions to be displayed in a bold font. This selection will apply to all text typed in the **Field Instructions** area.
Italics	Select if you want the instructions to be displayed in an italic font. This selection will apply to all text typed in the **Field Instructions** area.

Color	

Click **Close**.

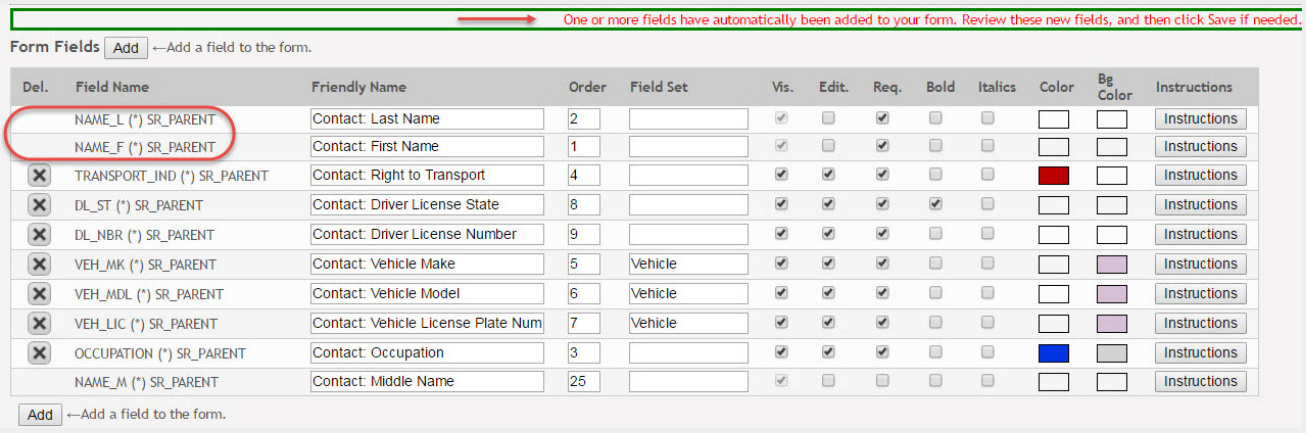
To remove a column from the form, click the delete icon for the column.



It is removed from the list, but it is not actually deleted until you click **Save**.

Click **Save**.

NOTE: If you created a form with fields from a vertical table, some required additional fields may be added automatically. If so, a message is displayed prompting you to review the fields before saving.



Note the added fields. These fields cannot be removed; the delete icon is not displayed.

Click **Save** again.

Form saved successfully.

Form Fields Add ←Add a field to the form.

Del.	Field Name	Friendly Name	Order	Field Set	Vis.	Edit.	Req.	Bold	Italics	Color	Bg Color
	NAME_L (*) SR_PARENT	Contact: Last Name	2		☑	☐	☑	☐	☐		
	NAME_F (*) SR_PARENT	Contact: First Name	1		☑	☐	☑	☐	☐		
✕	TRANSPORT_IND (*) SR_PARENT	Contact: Right to Transport	4		☑	☑	☑	☐	☐		
✕	DL_ST (*) SR_PARENT	Contact: Driver License State	8		☑	☑	☑	☑	☐		
✕	DL_NBR (*) SR_PARENT	Contact: Driver License Number	9		☑	☑	☑	☐	☐		
✕	VEH_MK (*) SR_PARENT	Contact: Vehicle Make	5	Vehicle	☑	☑	☑	☐	☐		
✕	VEH_MDL (*) SR_PARENT	Contact: Vehicle Model	6	Vehicle	☑	☑	☑	☐	☐		
✕	VEH_LIC (*) SR_PARENT	Contact: Vehicle License Plate Num	7	Vehicle	☑	☑	☑	☐	☐		
✕	OCCUPATION (*) SR_PARENT	Contact: Occupation	3		☑	☑	☑	☐	☐		
	NAME_M (*) SR_PARENT	Contact: Middle Name	25		☑	☐	☐	☐	☐		

Add ←Add a field to the form.

Based on the settings in the example above, the form will look like this to the parent in txConnect:

LBM M.S. Right to Transport

This form must be submitted annually.

*Indicates a pending change.

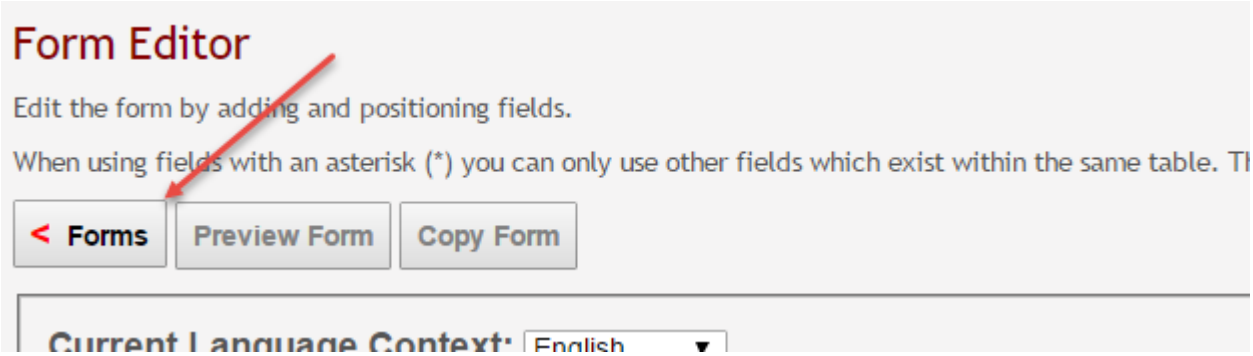
Contact: First Name	{Pending Data}
Contact: Last Name	{Pending Data}
Contact: Occupation	{Pending Data}
Contact: Right to Transport	{Pending Data}

Vehicle

Contact: Vehicle Make	{Pending Data}
Contact: Vehicle Model	{Pending Data}
Contact: Vehicle License Plate Number	{Pending Data}

Contact: Driver License State	{Pending Data}
Contact: Driver License Number	{Pending Data}
Contact: Middle Name	{Pending Data}

Click **< Forms** to return to the Form Management page.



Static Forms

To create a Spanish static form, you must have already uploaded a Spanish version of the static form, and you must have created a form using the Spanish document.

Current Language Context	Select the language of the form you are editing.
Name	The form name is displayed as entered in the previous step. Modify the field if necessary. For a Spanish form, ensure that a Spanish name is entered.
Campus	The campus is displayed as entered in the previous step. Modify the field if necessary. • Select a campus if the form is specific to one campus. • Select *None - District* if the form is for all campuses in the district.
Static document selection	The drop-down lists all available static forms. Select the static form to associate with this form. For a Spanish form, ensure that the Spanish static form is selected.
Visible	The setting entered on the previous page is displayed, indicating if the form is visible to parents in txConnect. Modify the setting if necessary.
Archived	• *Yes* - Archive the form, which allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes. • *No* - Do not archive the form. Archived forms are *not* visible to parents in txConnect. New Student Enrollment forms cannot be archived.
Special Instructions or information for this form	The text box displays any text entered on the previous page. Modify the text if necessary, up to 2000 characters. For a Spanish form, ensure that Spanish instructions are entered.

Click **Save**.

Click **< Forms** to return to the Form Management page.

Create a Spanish version of a static form:

> To create a Spanish static form, you must have already uploaded a Spanish version of the document.

1. Click the spyglass icon for the form. The form opens on the Form Editor page where you can make changes.

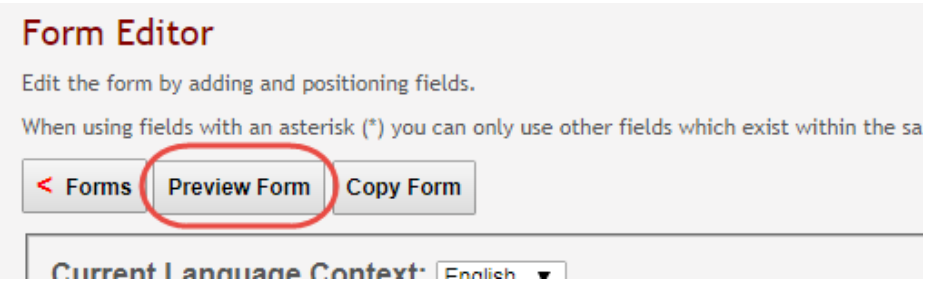
2. In the **Language Context** field, select *Spanish*.

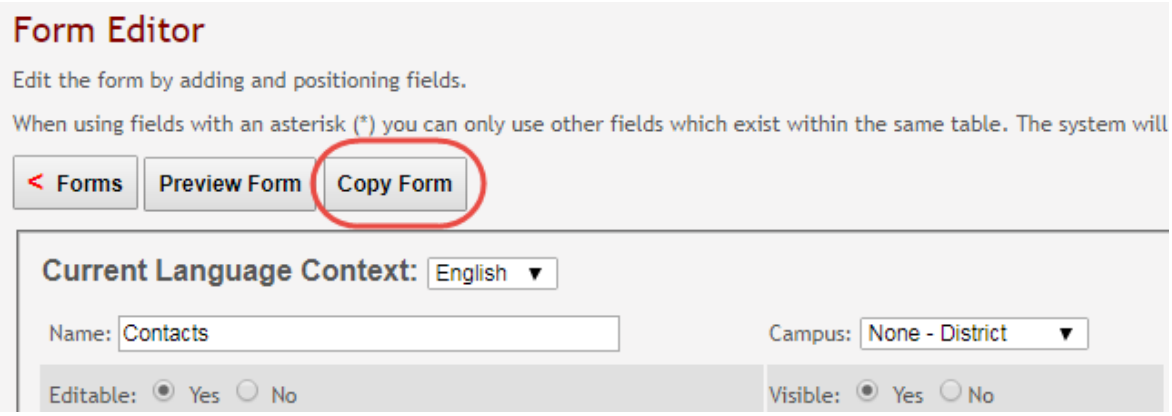
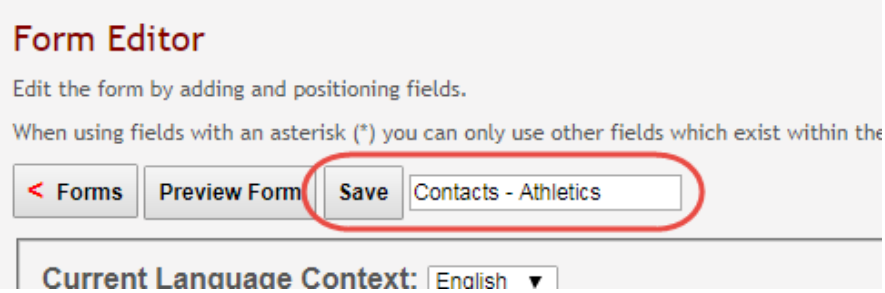
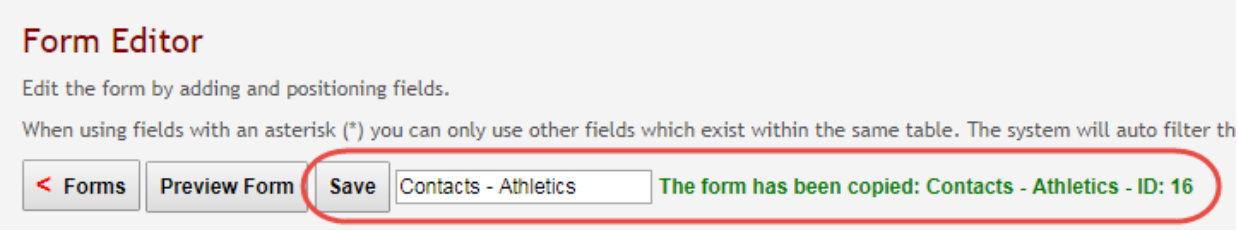
3. Ensure that the Spanish version of the form is selected for **Static document selection**.

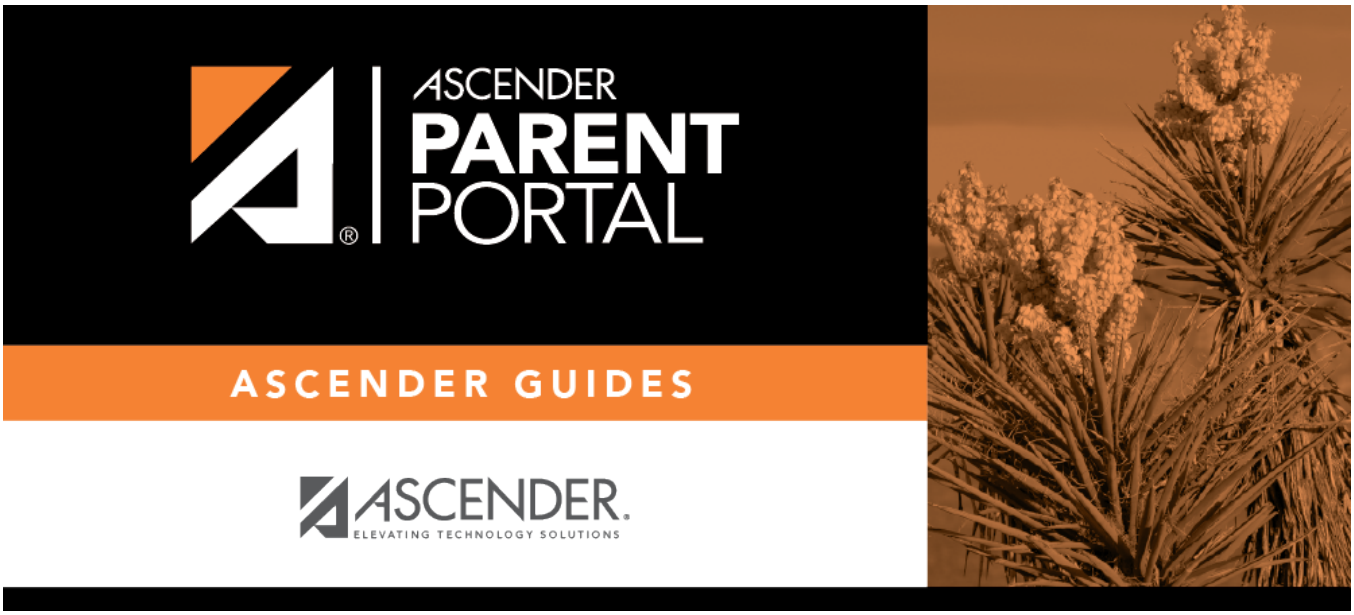
4. Ensure that the **Name** and **Special instructions** are provided in Spanish.

5. Click **Save**.

Preview or copy a form:

Preview	Click to view the saved changes to the form. • Only static and dynamic forms can be previewed. *New Student Enrollment* forms cannot be previewed. • In the preview window, data cannot be edited or saved.  The form opens in a pop-up window or different tab allowing you to view the form as it will be displayed to parents in txConnect.

Copy Form (as New)	Click to create a new form that is an exact duplicate of the form you are copying. • Only static and dynamic forms can be copied. • Only saved changes are copied to the new form; unsaved changes are not copied.  A text box is displayed allowing you to type a name for the new form. The new form name cannot already be in use by another form, and it must be three or more characters.  Click **Save**.  The new form is now displayed on the Forms Management page and can be modified as needed.


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