

admin_formmanage_body

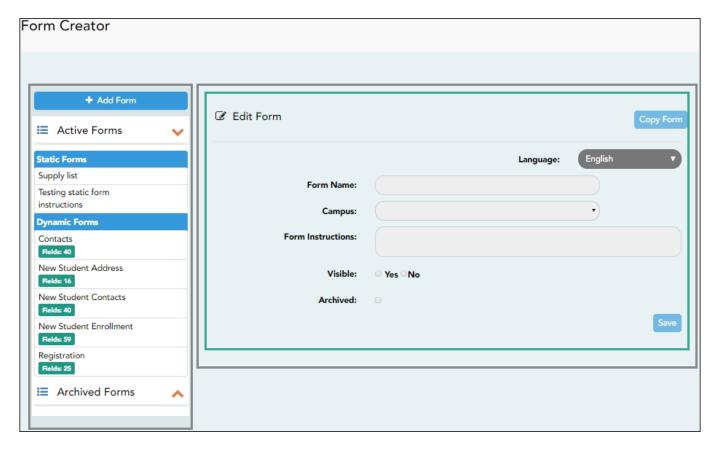
Table of Contents

The Form Creator allows you to create new forms, as well as delete and edit existing forms.

Two types of forms can be created:

- Static forms can be created using the static documents you have already uploaded.
- **Dynamic forms** can be created using the fields you selected in previous steps.

NOTE: A form must be added to a group in order to be accessible to parents. You will add the form to a group in a subsequent step.



On the left side of the page, any existing forms are listed.

- Active Forms are listed first, and Archived Forms are listed below active forms.
 - Click to hide Active Forms or Archived Forms.
 Click to re-display Active Forms or Archived Forms.
- Forms are automatically grouped by form type (**Static** first, then **Dynamic**).

Forms that have an uploaded document attached are listed under **Static**.

Forms that do not have an uploaded document attached are listed under **Dynamic**.

- Under **Active Forms Dynamic**, three 'New Student' forms are included by default:
 - New Student Enrollment
 - New Student Contacts
 - New Student Address

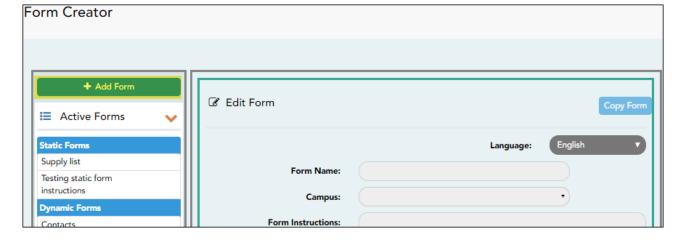
The following forms are also included by default:

- Contacts
- Registration
- **Fields:** # indicates the number of fields that have been added to a dynamic form. Static forms do not have fields.

Create a new form:

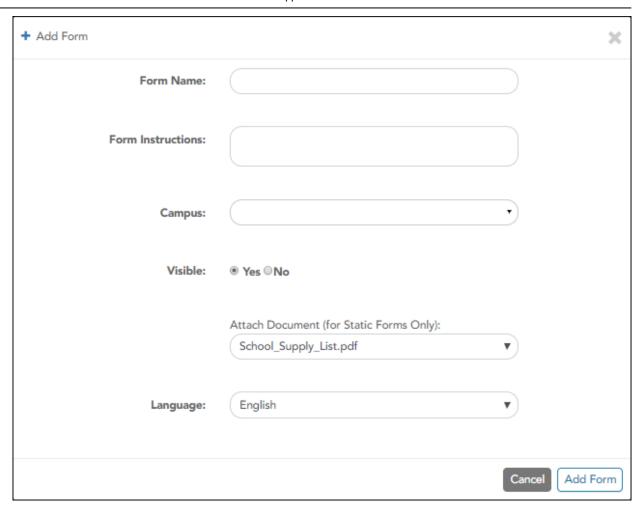
1. Create a static form using an uploaded document.

If you uploaded any documents on Document Upload, you must create a form with each document in order to make it accessible to parents. If you have English and Spanish versions of documents, you must upload each document individually.



☐ Click **Add Form**.

A pop-up window opens.



Form Name	Type a name for the form. For a Spanish form, provide the name in Spanish.			
Form Instructions	Type any specific district-level instructions for the form. For a Spanish form, provide the instructions in Spanish.			
Campus		ous in order to assign the form to a specific campus. Or, select <i>All</i> the form is used for all campuses in the district.		
	If you select <i>All Campuses</i> , each campus is listed, and you can remove individual campuses if needed.			
	Campus: 001 - (001 001 School PK-12) X			
	All Campuses			
	Cancel All			
	004 - (004 004 School 06-12)			
	NOTE: If you select <i>All Campus</i> by mistake, click <i>Cancel All</i> to clear all campuses at once.			
Visible	Select Yes if you want the form to visible to parents in ParentPortal.			
Attach Document	Select the form from the list in the drop-down field.			
	For a Spanish	form, be sure to select the Spanish version of the form.		
Language	Select the lan	guage of the form.		

3

☐ Click **Add Form**.

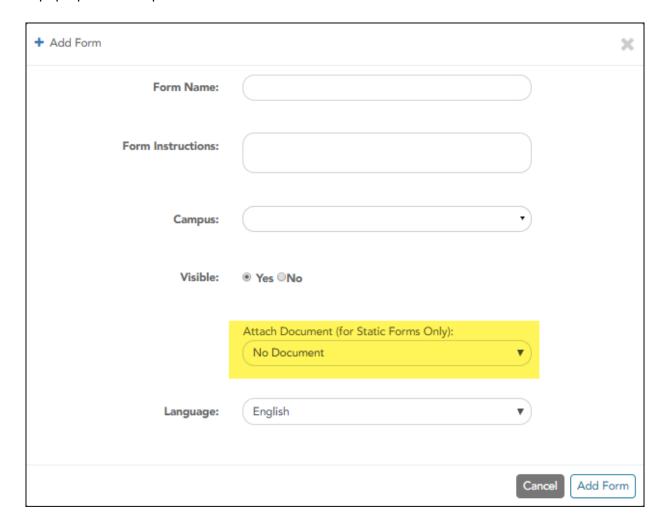
The form is added to the **Active Forms** list on the left side of the page, under **Static Forms**.

- ☐ Repeat for all remaining static documents, including Spanish documents.
- 2. Create/edit a dynamic form using data fields.

Dynamic forms are built using the fields from Forms Field Management.

☐ Click **Add Form**.

A pop-up window opens.



Form Name	At this time, user's may alter an existing Dynamic Form's Form Name field by following these steps: Select the Dynamic Form to modify. Click Copy Form . Then modify the Form Name field of the copied Dynamic Form.			
	This will be	corrected with future programming.		
Form Instructions	Type any specific district-level instructions for the form. For a Spanish form, provide the instructions in Spanish.			
	if the form is used for all campuses in the district. If you select <i>All Campus</i> , each campus is listed, and you can remove individual campuses if needed.			
	Campus: O01 - (001 001 School PK-12) X All Campuses Cancel All 004 - (004 004 School 06-12)			
	NOTE: If you select <i>All Campus</i> by mistake, click <i>Cancel all</i> to clear all campuses at once.			
Visible	Select Yes if	you want the form to visible to parents in ParentPortal.		

IMPORTANT: For a dynamic form, leave the drop-down field set to *No Document*.

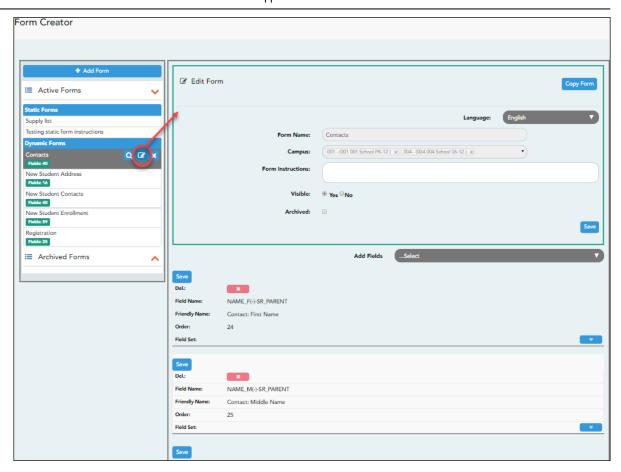
☐ Click **Add Form**.

The form is added to the **Active Forms** list on the left side of the page, under **Dynamic Forms**.

☐ Under **Active Forms**:

- Hover over the new or existing dynamic form and click the edit icon.

The form details open in the **Edit Form** section (right side) where you can add or edit details:



Form Name	The name entered on the previous page is displayed and can be modified. Type a name for the form. For a Spanish form, provide the name in Spanish.			
Form Instructions		ons entered on the previous page are displayed and can be modified. Type listrict-level instructions for the form. For a Spanish form, provide the a Spanish.		
Campus		es) selected on the previous page are displayed and can be modified. npus if the form is used for all campuses in the district.		
	If you select A campuses if r	All Campus, each campus is listed, and you can remove individual needed.		
	Campus:	001 - (001 001 School PK-12) X		
		All Campuses		
		Cancel All		
	004 - (004 004 School 06-12)			
	NOTE: If you select <i>All Campus</i> by mistake, click <i>Cancel all</i> to clear all campuses at once.			
Visible	The setting entered on the previous page is displayed and can be modified. Select Yes if you want the form to visible to parents in ParentPortal.			
Archived	Select to 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.			
	Archived forms are not visible in ParentPortal.			
	New Student	Enrollment forms cannot be archived.		

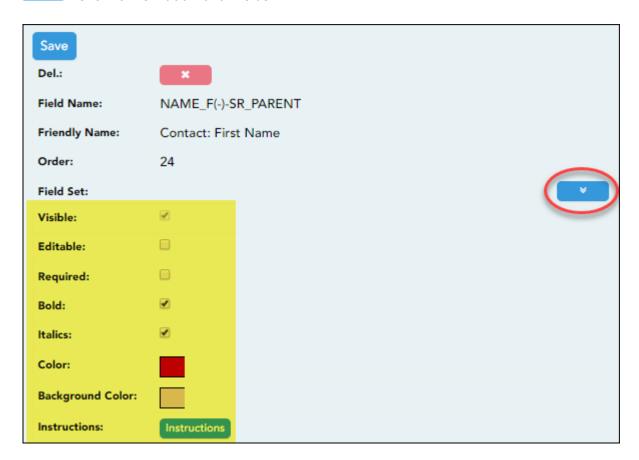
☐ Click **Save**.

☐ Select the fields to include on the form from the drop-down list:

NOTE: You must save changes for each field individually.

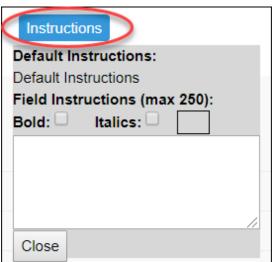
Field name	The selected FIELD-NAME(-)-TABLE-NAME is displayed.
Friendly Name	The English default friendly name is displayed. Modify the name as needed.
Order	A default order number is assigned. (Optional) Indicate the order in which you want the fields to be displayed on the form. For example, type 1 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 <i>Field Set</i> specified.
	Field Set does not apply to New Student Enrollment Forms.

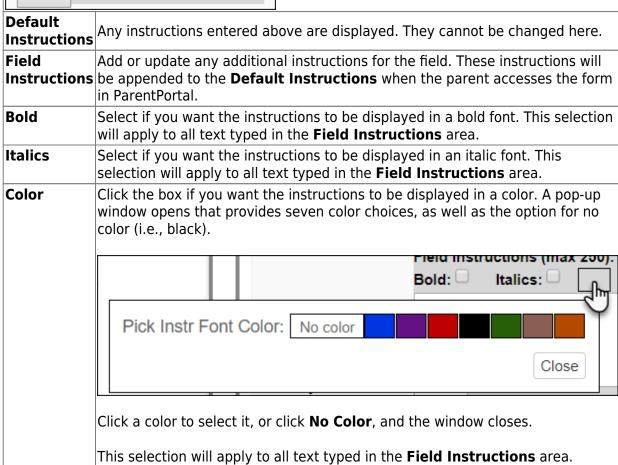
Click to view additional fields.



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. 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 Form Field Management. 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. 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). Pick Font Color: No 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.					
If selected, the form field will be editable, but only if the field is also set to Updateable=true on Form Field Management. 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. Select if the field is required of the parents. If this field is selected, be sure Edit is also selected. Select if you want the field to be displayed in a bold font. 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). Pick Font Color: No color Click the box to select it, and the window closes. Background 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. Pick Bkgr Color: No color Close 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.	Visible	the four-digit zip code extension. The setting of this field overrides all other			
be editable. This setting does not apply to New Student forms. Select if the field is required of the parents. If this field is selected, be sure Edit is also selected. 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). Pick Font Color: No color Click a color to select it, and the window closes. 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. Pick Bkgr Color: 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.	Editable	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			
Edit is also selected. 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). Pick Font Color: No color Close Click a color to select it, and the window closes. Background 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. Pick Bkgr Color: No color Close 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.		be editable.			
Select if you want the field to be displayed in an italic font. 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). Pick Font Color: No color Click a color to select it, and the window closes. Background 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. Pick Bkgr Color: No color Close 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.	Required				
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). Pick Font Color: No color Click a color to select it, and the window closes. Background 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. Pick Bkgr Color: 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.	Bold	Select if you want the field to be displayed in a bold font.			
black. A pop-up window opens that provides seven color choices, as well as the option for no color (i.e., black). Pick Font Color: No color Close Click a color to select it, and the window closes. Background 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. Pick Bkgr Color: No color Close 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.	Italics	Select if you want the field to be displayed in an italic font.			
Click a color to select it, and the window closes. Background 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. Pick Bkgr Color: 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.	Color	black. A pop-up window opens that provides seven color choices, as well as the			
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. Pick Bkgr Color: No color Close 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.		Z _{IM}			
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. Pick Bkgr Color: No color Close 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 ParentPortal. If you do not select a color, or if you select No Color, the background will be gray.		Click a color to select it, and the window closes.			
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The form is automatically shaded with an alternating (light/dark) gray background when displayed for parents in ParentPortal. If you do not select a color, or if you select No Color , the background will be gray.		Z _m			
background when displayed for parents in ParentPortal. If you do not select a color, or if you select No Color , the background will be gray.		Click a color to select it, and the window closes.			
Instructions		background when displayed for parents in ParentPortal. If you do not select a			
	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 the corresponding delete icon to remove a column from the form.

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 displayed.

☐ Click **Save**.

Form field edits

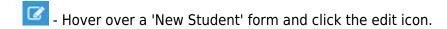
3. Edit settings for a 'New Student' form.

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. See the **Create/edit a dynamic form using data fields** section for more details.

Under Active Forms:



The form details open in the **Edit Form** section (right side) where you can add or edit details as described previously.

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

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

☐ Click **Save**.

4. Create a new form by copying an existing form.

An existing static or dynamic forms can be duplicated and renamed.

Only saved changes are copied to the new form; unsaved changes are not copied.

☐ Click **Copy Form** to create a new form that is an exact duplicate of the form you are copying.



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.



☐ Type the new form name and click **Save**.

The new form is now displayed on the **Active Forms** list and can be modified as needed.

New forms are initially displayed at the top of the list. Once the page is refreshed, the form is sorted alphabetically with the section.

5. Create a custom form.

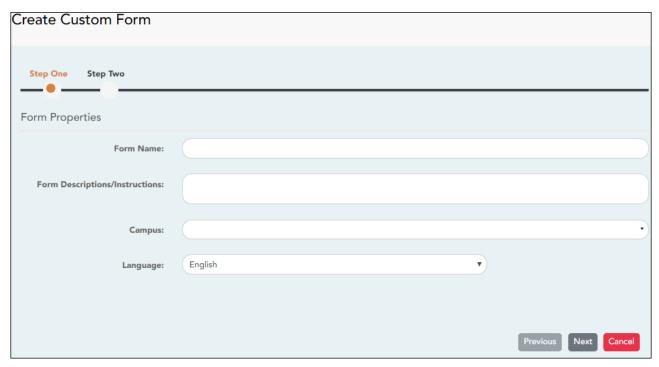
ASCENDER Parent Portal Admin > Form Management > Custom Forms > Create Custom Form

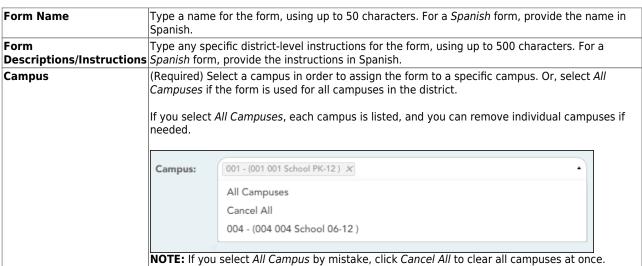
Step 1

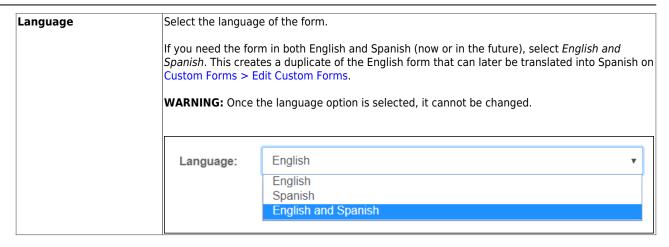
If selecting *English and Spanish* for **Language**, the English version will be created first. To translate into a Spanish version, use Custom Forms > Edit Custom Forms.

Form Properties:

 \square Add the form.



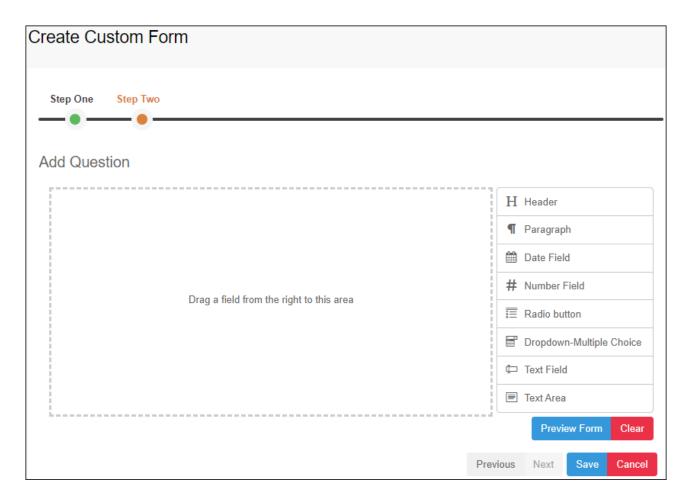




☐ Click **Next**.

Step 2

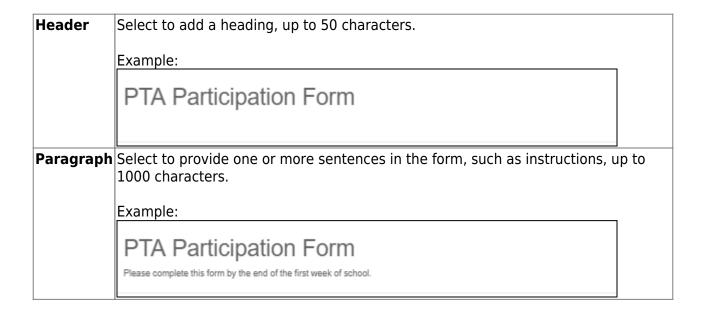
Question Format Types:



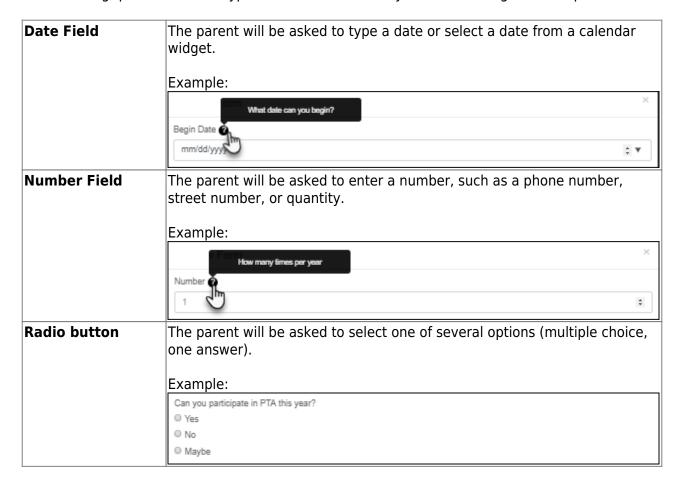
☐ You can add a variety of elements to your form.

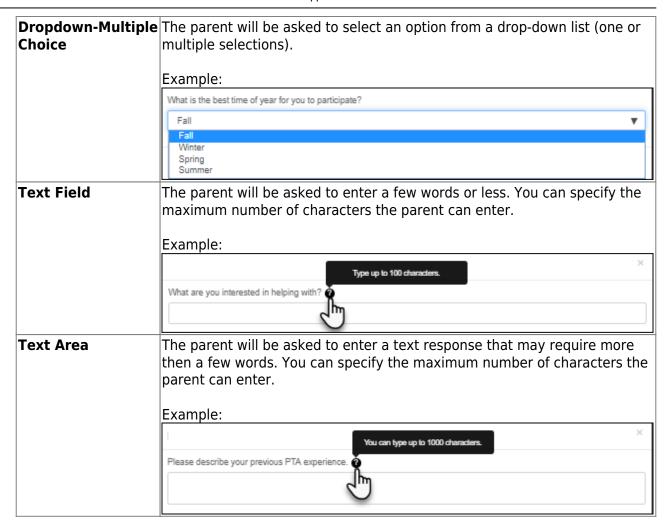
- Drag the element from the right to the blank area in the middle.
- You can drag and drop the elements to re-position them within the form.
- Click **Preview Form** any time to see how the form will look to parents.

The following two options allow you to provide headings and instructions on the form.



The following question format types refer to the answer you are soliciting from the parent.





All question format types allow the following properties to be set:

NOTE: For *Spanish* forms, provide this information in Spanish.

TIP: Be sure to add questions to the custom form that help identify the student that the information is being gathered for (e.g., What is your student's first name? What is your student's last name? Grade Level? What school does your child attend? (multiple choice)). The form results do not automatically provide default information such as first name, last name, grade level, campus.

Select if parents are required to answer this question.	
Type the question as you want it to appear in ParentPortal. NOTE : Labels should be different for each field on individual forms. This text is for internal use when viewing custom form data.	

Tool Tip	Type further instructions for the question if needed. This will be displayed when a parent hovers over a question mark icon ② next to the field.
Placeholder Text	Type any text that you want to appear in the field, such as a sample answer or guidance. For example, in an email field, you may type name@email.com. The parent's actual answer will overwrite any placeholder text. For Date Field , the placeholder text is always mm/dd/yyyy.

The following properties depend on the type of question format type selected:

NOTE: For *Spanish* forms, provide this information in Spanish.

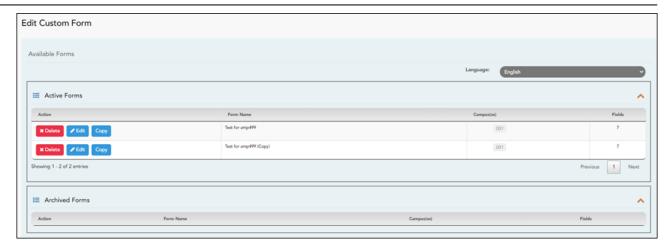
Property	Question Type(s)	Description							
Size	Header	Select the font s		size for the header.					
Description	Paragraph	Type any inst	ructio	ons or information	about the form.				
Options	Radio button,	Type each option the parent can choose from. There are two fields for each option: In the left field, type the option as it should be displayed in ParentPortal. In the right field, type the option the way you want it to appear in the response. Parents will not see this name; it is for internal use only. It is okay for these to be the same. Click Add Option + to add as many options as needed. Click x to remove an option.							
	Dropdown-Multiple Choice	Options:0	0	Yes	Yes	Yes I want to join PTA			
			0	No	No,	I do not want to	o join x		
			0	Maybe	May	be - I do not kn	ow x		
							Add Option +		
Allow Multiple Selections	Dropdown-Multiple Choice	Indicate if the	pare	ent can choose mor	e than one opt	ion.			
Display Options Horizontally	Radio button	Option 1	Optio	ons are displayed on 2 Option 3 Ch option is display					
Default Value	Date Field	Indicate the default value. If entered, it will be displayed initially, rather the Placeholder text. If the parent deletes the default value, the Placeholder displayed.							
Minimum/Maximum Number		Specify a rang	ge of	numbers that are a	allowed.				
Minimum/Maximum Date	Date Field	Specify a range of dates that are allowed.							
Maximum Characters	Text Field, Text Area	Indicate the maximum number of characters the parent can enter.							

Property	Question Type(s)	Description	
Number of Rows	ΠΑΥΓ ΔΥΡΆ	Specify how tall the text area is. The number of rows does not affect the number of characters the parent can enter.	
Input Type	Text Field, Text Area	Select the type of text you are asking the parent to enter.	

☐ You can further adjust the form. Hover over each question in the form:
- Click to remove the question from the form Click to view/modify the properties of the question.
Click Close to collapse (i.e., hide) the properties for a particular question.
- Click to duplicate the question including its properties.
☐ Click Clear if you need to remove all questions from the form and start over.
☐ Click Save .
☐ Click Previous if you need to return to Step 1 to modify form properties.
NOTE: A custom form must be added to either the Returning Student Registration or Student Data Maintenance group (under Form Group Management) to be visible to parents. Custom forms are not available for use in New Student Enrollment.

ASCENDER Parent Portal Admin > Form Management > Custom Forms > Edit Custom Form

This page allows you to view or modify existing custom forms that you have created. Copy allows you to copy a form and add or remove fields.



Your existing custom forms are listed. **Active Forms** are listed first, and **Archived Forms** are listed below active forms.

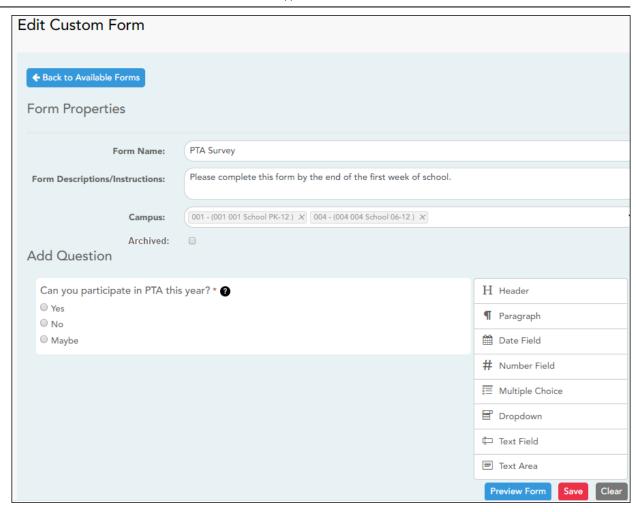
To translate an *English and Spanish* form into Spanish, select Spanish from the **Language** drop-down menu and select **Edit**.

WARNING: When translating into Spanish, only translate the text, **do not** change the order of the Questions or add any Questions. Doing so will cause data in the Spanish version to become out of sync with the English version.

☐ Click **Edit** to view/modify a form.

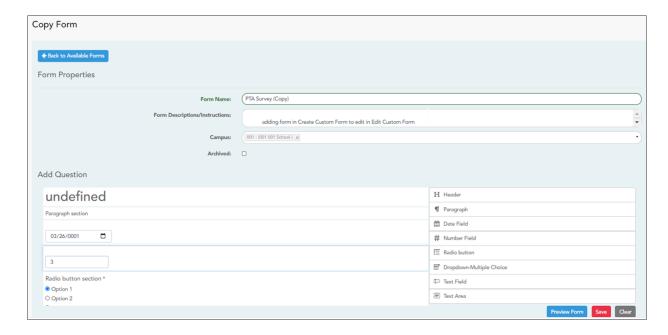
The form opens in editing mode. You can make changes as described on Custom Forms > Create Custom Form.

NOTE: Custom Forms with data attached have limited edit capabilities. The campus cannot be edited and fields cannot be rearranged, deleted or duplicated. If major changes are required, it is recommended to use the **Copy Form** feature to create a new form.



☐ Or, click **Copy** to copy a form.

The form opens in editing mode. You can make a copy of a form and add or remove fields as described on Custom Forms > Create Custom Form. The **Form Name** field is limited to 50 characters.

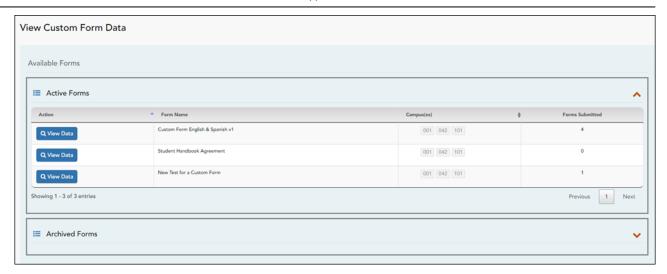


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rr
☐ Select Archive to archive the form.
Archiving allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.
☐ Click Back to Available Forms to return to the list of existing custom forms.
☐ Click Delete to delete a custom form.
NOTE: A custom form cannot be deleted if there is data associated with it.
ASCENDER Parent Portal Admin > Form Management > Custom Forms > View Custom Form Data
This page allows you to view data submitted by parents in custom forms.

Your existing custom forms are listed. **Active Forms** are listed first, and **Archived Forms** are listed below active forms.

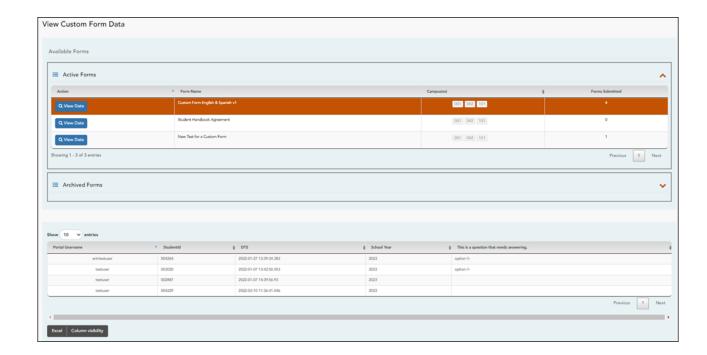
NOTE: Archived forms are forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.



	Name The name of the custom form is displayed, as entered in Step 1 on the Create Custom Form page.	
Campus The campuses using the custom form are listed.		
Forms Submitted	The number of form responses submitted by parents is displayed.	

☐ Click **View Data** to view the answers submitted by parents. <div indent>The answer data is displayed in a grid below the forms list.

TIP: You can click the column headings to sort data by a particular question.



Excel Click to export the report as a spreadsheet.

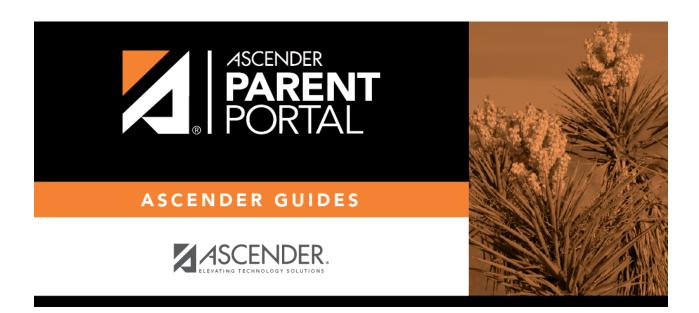
Column visibility	Click to	select which	columns to	include i	n the ex	port
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NOTE: It is recommended that you save a backup copy of the form once all data is gathered.

 \square Click **Preview** to view the saved changes to the form.

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 ParentPortal.

In the preview window, data cannot be edited or saved.



Back Cover