



ASCENDER GUIDES





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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.

The screenshot shows the 'Form Creator' interface. On the left, there is a sidebar with a list of forms. The 'Active Forms' section is expanded, showing a list of forms including 'Supply list', 'Testing static form instructions', 'Contacts' (40 fields), 'New Student Address' (16 fields), 'New Student Contacts' (40 fields), 'New Student Enrollment' (59 fields), and 'Registration' (25 fields). Below this is the 'Archived Forms' section. The main area is titled 'Edit Form' and contains a form with the following fields: 'Form Name' (text input), 'Campus' (dropdown menu), 'Form Instructions' (text area), 'Language' (dropdown menu set to 'English'), 'Visible' (radio buttons for 'Yes' and 'No'), and 'Archived' (checkbox). There are 'Copy Form' and 'Save' buttons in the top right corner of the form area.

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:

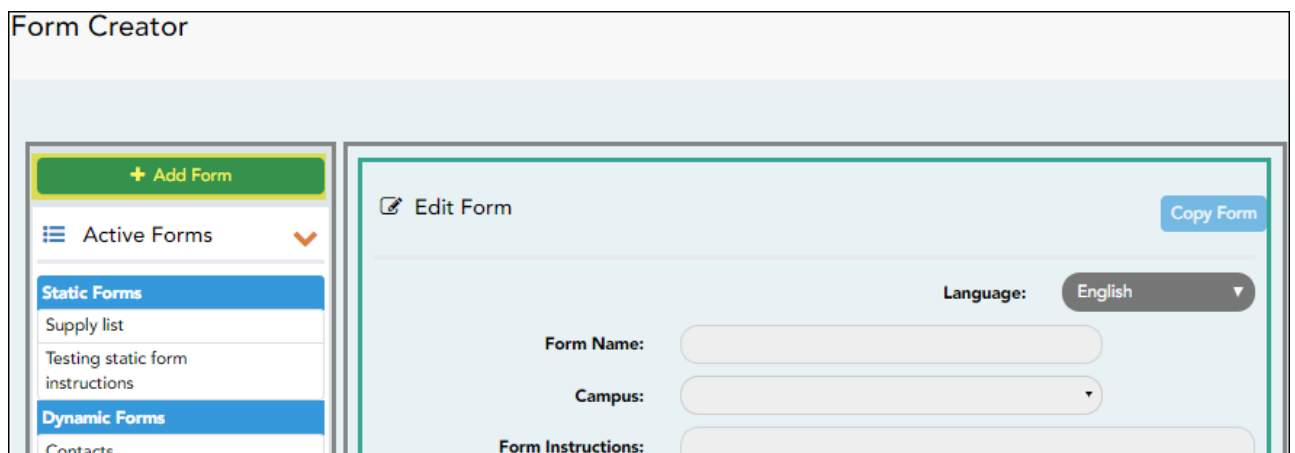
- Contacts
- Registration

- **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 new 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.



The screenshot shows the 'Form Creator' interface. On the left, there is a sidebar with a green '+ Add Form' button at the top. Below it, there is a section titled 'Active Forms' with a dropdown arrow. Under 'Active Forms', there are two categories: 'Static Forms' and 'Dynamic Forms'. Under 'Static Forms', there are three items: 'Supply list', 'Testing static form', and 'instructions'. Under 'Dynamic Forms', there is one item: 'Contacts'. The main area of the interface is titled 'Edit Form' and contains a 'Copy Form' button in the top right corner. Below the 'Copy Form' button, there is a 'Language:' dropdown menu set to 'English'. Below the 'Language' dropdown, there are three input fields: 'Form Name:', 'Campus:', and 'Form Instructions:'. The 'Form Name' and 'Campus' fields are currently empty, and the 'Form Instructions' field is partially visible at the bottom.

- Click **Add Form**.

A pop-up window opens.

+ Add Form

Form Name:

Form Instructions:

Campus:

Visible:
☒ Yes
☐ No

Attach Document (for Static Forms Only):
School\_Supply\_List.pdf

Language:
English

Cancel
Add Form

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

- ☐ 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 a new dynamic form \(using data fields\)](#).

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**:



- Hover over a 'New Student' form and click the edit icon.

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**.

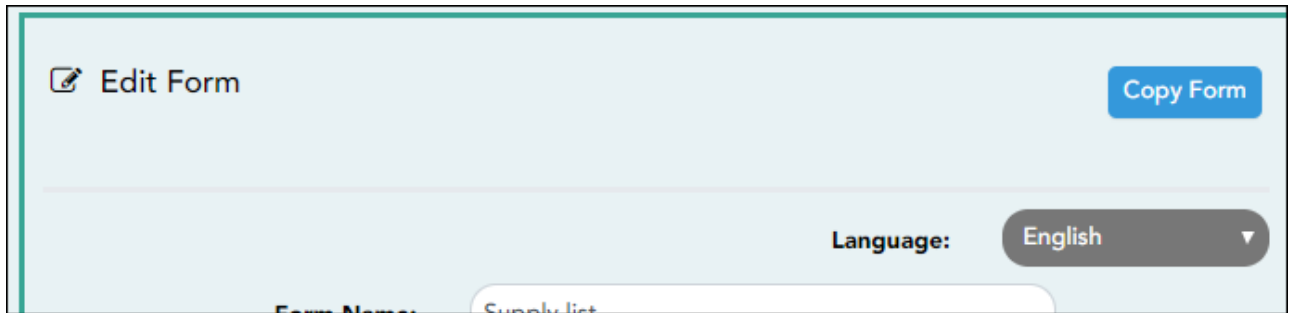


#### 4. Create a new form by copying an existing form.

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

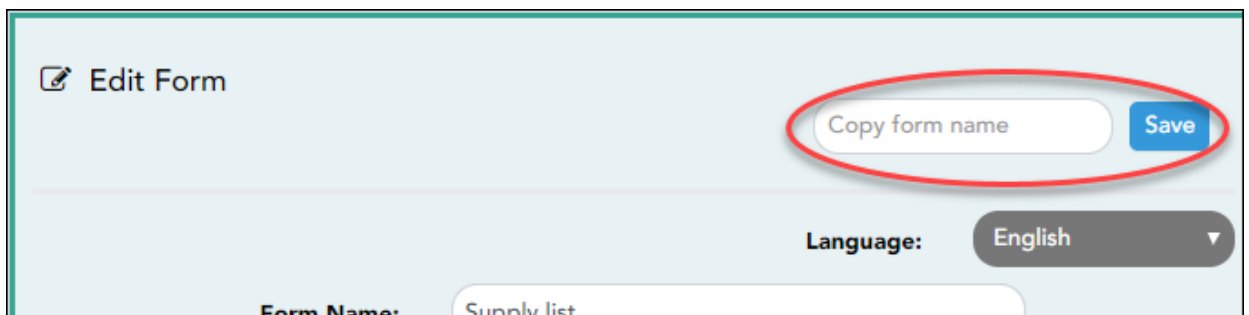
Only saved changes are copied to the new form; unsaved changes are not copied.

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

A screenshot of a web interface for editing a form. At the top left, there is a pencil icon followed by the text 'Edit Form'. At the top right, there is a blue button labeled 'Copy Form'. Below these, there is a 'Language:' label and a dropdown menu currently showing 'English'. At the bottom, there is a 'Form Name:' label and a text input field containing 'Supply list'.

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.

A screenshot of the same web interface as before, but now a red oval highlights a new text input field labeled 'Copy form name' and a blue 'Save' button next to it. The 'Language:' dropdown still shows 'English', and the 'Form Name:' field still contains 'Supply list'.

- ☐ 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:

☐ Add the form.

### Create Custom Form

Step One

Step Two

Form Name:

Form Descriptions/Instructions:

Campus:

Language:

English

Previous

Next

Cancel

<b>Form Name</b>	Type a name for the form, using up to 50 characters. For a <i>Spanish</i> form, provide the name in Spanish.
<b>Form Descriptions/Instructions</b>	Type any specific district-level instructions for the form, using up to 500 characters. For a <i>Spanish</i> form, provide the instructions in Spanish.
<b>Campus</b>	<p>(Required) Select a campus in order to assign the form to a specific campus. Or, select <i>All Campuses</i> if the form is used for all campuses in the district.</p> <p>If you select <i>All Campuses</i>, each campus is listed, and you can remove individual campuses if needed.</p> <div> <div>Campus:</div> <div> 001 - (001 001 School PK-12 ) X All Campuses Cancel All 004 - (004 004 School 06-12 ) </div> </div> <p><b>NOTE:</b> If you select <i>All Campus</i> by mistake, click <i>Cancel All</i> to clear all campuses at once.</p>

<b>Language</b>	<p>Select the language of the form.</p> <p>If you need the form in both English and Spanish (now or in the future), select <i>English and Spanish</i>. This creates a duplicate of the English form that can later be translated into Spanish on <a href="#">Custom Forms &gt; Edit Custom Forms</a>.</p> <p><b>WARNING:</b> Once the language option is selected, it cannot be changed.</p> <div><p>Language:</p><div><div>English</div><div>English</div><div>Spanish</div><div>English and Spanish</div></div></div>
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☐ Click **Next**.

## Step 2

### Question Format Types:

### Create Custom Form

Step One

Step Two

Add Question

Drag a field from the right to this area

H Header

¶ Paragraph

📅 Date Field

# Number Field

☑ Radio button

☑ Dropdown-Multiple Choice

📄 Text Field

☑ Text Area

Preview Form

Clear

Previous

Next

Save

Cancel

☐ 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.

<b>Header</b>	<p>Select to add a heading, up to 50 characters.</p> <p>Example:</p> <div>PTA Participation Form</div>
<b>Paragraph</b>	<p>Select to provide one or more sentences in the form, such as instructions, up to 1000 characters.</p> <p>Example:</p> <div> PTA Participation Form  Please complete this form by the end of the first week of school. </div>

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

<b>Date Field</b>	<p>The parent will be asked to type a date or select a date from a calendar widget.</p> <p>Example:</p> <div> What date can you begin?  Begin Date  mm/dd/yyyy </div>
<b>Number Field</b>	<p>The parent will be asked to enter a number, such as a phone number, street number, or quantity.</p> <p>Example:</p> <div> How many times per year  Number  1 </div>
<b>Radio button</b>	<p>The parent will be asked to select one of several options (multiple choice, one answer).</p> <p>Example:</p> <div> Can you participate in PTA this year?  <input type="radio"/> Yes  <input type="radio"/> No  <input type="radio"/> Maybe </div>


<b>Dropdown-Multiple Choice</b>	<p>The parent will be asked to select an option from a drop-down list (one or multiple selections).</p> <p>Example:</p> 
<b>Text Field</b>	<p>The parent will be asked to enter a few words or less. You can specify the maximum number of characters the parent can enter.</p> <p>Example:</p> 
<b>Text Area</b>	<p>The parent will be asked to enter a text response that may require more than a few words. You can specify the maximum number of characters the parent can enter.</p> <p>Example:</p> 

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

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


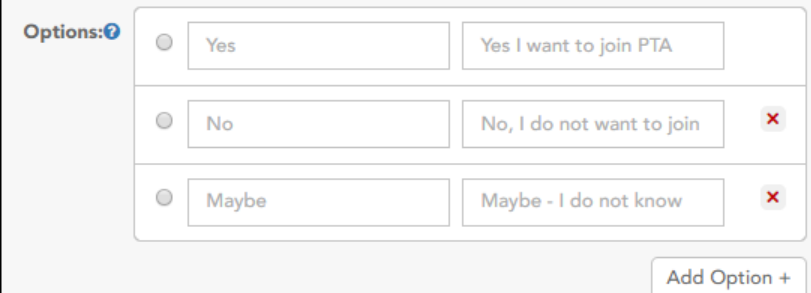
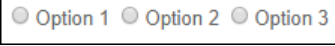
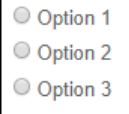
**TIP:** Be sure to add questions to the custom form that help identify the student that the information is being gathered for (e.g., What is your student's first name? What is your student's last name? Grade Level? What school does your child attend? (multiple choice)). The form results do not automatically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

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

<b>Tool Tip</b>	Type further instructions for the question if needed. This will be displayed when a parent hovers over a question mark icon  next to the field.
<b>Placeholder Text</b>	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 <i>name@email.com</i> . The parent's actual answer will overwrite any placeholder text. For <b>Date Field</b> , 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
<b>Size</b>	Header	Select the font size for the header.
<b>Description</b>	Paragraph	Type any instructions or information about the form.
<b>Options</b>	Radio button, Dropdown-Multiple Choice	<p>Type each option the parent can choose from. There are two fields for each option:</p> <ul style="list-style-type: none"> <li>In the left field, type the option as it should be displayed in ParentPortal.</li> <li>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.</li> </ul> <p>It is okay for these to be the same.</p> <ul style="list-style-type: none"> <li>Click <b>Add Option +</b> to add as many options as needed.</li> <li>Click  to remove an option.</li> </ul> 
<b>Allow Multiple Selections</b>	Dropdown-Multiple Choice	Indicate if the parent can choose more than one option.
<b>Display Options Horizontally</b>	Radio button	<p>If selected, all options are displayed on the same row.</p>  <p>If not selected, each option is displayed on a separate row.</p> 
<b>Default Value</b>	Date Field	Indicate the default value. If entered, it will be displayed initially, rather than the Placeholder text. If the parent deletes the default value, the <b>Placeholder Text</b> is displayed.
<b>Minimum/Maximum Number</b>	Number Field	Specify a range of numbers that are allowed.
<b>Minimum/Maximum Date</b>	Date Field	Specify a range of dates that are allowed.
<b>Maximum Characters</b>	Text Field, Text Area	Indicate the maximum number of characters the parent can enter.

Property	Question Type(s)	Description
Number of Rows	Text Area	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.

**Edit Custom Form**

Available Forms

Language: English

**Active Forms**

Action	Form Name	Campus(es)	Fields
<a href="#">Delete</a> <a href="#">Edit</a> <a href="#">Copy</a>	Test for amp499	001	7
<a href="#">Delete</a> <a href="#">Edit</a> <a href="#">Copy</a>	Test for amp499 (Copy)	001	7

Showing 1 - 2 of 2 entries

Previous 1 Next

**Archived Forms**

Action	Form Name	Campus(es)	Fields
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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.



## Edit Custom Form

[← Back to Available Forms](#)

### Form Properties

**Form Name:** PTA Survey

**Form Descriptions/Instructions:** Please complete this form by the end of the first week of school.

**Campus:** 001 - (001 001 School PK-12 ) X 004 - (004 004 School 06-12 ) X

**Archived:** ☐

### Add Question

Can you participate in PTA this year? \* ?

☐ Yes  
☐ No  
☐ Maybe

H Header

¶ Paragraph

📅 Date Field

# Number Field

☰ Multiple Choice

☑ Dropdown

📄 Text Field

☒ Text Area

[Preview Form](#) [Save](#) [Clear](#)

❑ 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.

## Copy Form

[← Back to Available Forms](#)

### Form Properties

**Form Name:** PTA Survey (Copy)

**Form Descriptions/Instructions:** adding form in Create Custom Form to edit in Edit Custom Form

**Campus:** 001 - (001 001 School ) X

**Archived:** ☐

### Add Question

undefined

Paragraph section

03/26/0001 📅

3

Radio button section \*

☒ Option 1  
☐ Option 2

H Header

¶ Paragraph

📅 Date Field

# Number Field

☰ Radio button

☑ Dropdown-Multiple Choice

📄 Text Field

☒ Text Area

[Preview Form](#) [Save](#) [Clear](#)

- 
- ☐ 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.

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***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.

**View Custom Form Data**

Available Forms

Active Forms

Action	Form Name	Campus(es)	Forms Submitted
<a href="#">View Data</a>	Custom Form English & Spanish v1	001   042   101	4
<a href="#">View Data</a>	Student Handbook Agreement	001   042   101	0
<a href="#">View Data</a>	New Test for a Custom Form	001   042   101	1

Showing 1 - 3 of 3 entries

Previous **1** Next

Archived Forms

<b>Form Name</b>	The name of the custom form is displayed, as entered in Step 1 on the <a href="#">Create Custom Form</a> page.
<b>Campus</b>	The campuses using the custom form are listed.
<b>Forms Submitted</b>	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.

**View Custom Form Data**

Available Forms

Active Forms

Action	Form Name	Campus(es)	Forms Submitted
<a href="#">View Data</a>	Custom Form English & Spanish v1	001   042   101	4
<a href="#">View Data</a>	Student Handbook Agreement	001   042   101	0
<a href="#">View Data</a>	New Test for a Custom Form	001   042   101	1

Showing 1 - 3 of 3 entries

Previous **1** Next

Archived Forms

Show 10 entries

Portal Username	StudentId	DTS	School Year	This is a question that needs answering.
enrltestuser	004264	2022-01-27 13:39:34.383	2023	option-1-
testuser	003020	2022-01-07 13:42:50.453	2023	option-1-
testuser	002887	2022-01-07 14:39:56.93	2023	
testuser	004229	2022-03-10 11:36:41.446	2023	

Previous **1** Next

Excel Column visibility

<b>Excel</b>	Click to export the report as a spreadsheet.
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<b>Column visibility</b>	Click to select which columns to include in the export.
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**NOTE:** It is recommended that you save a backup copy of the form once all data is gathered.

☐ 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