ASCENDER PARENT PORTAL

ASCENDER GUIDES

ASCENDER.
ELEVATING TECHNOLOGY SOLUTIONS

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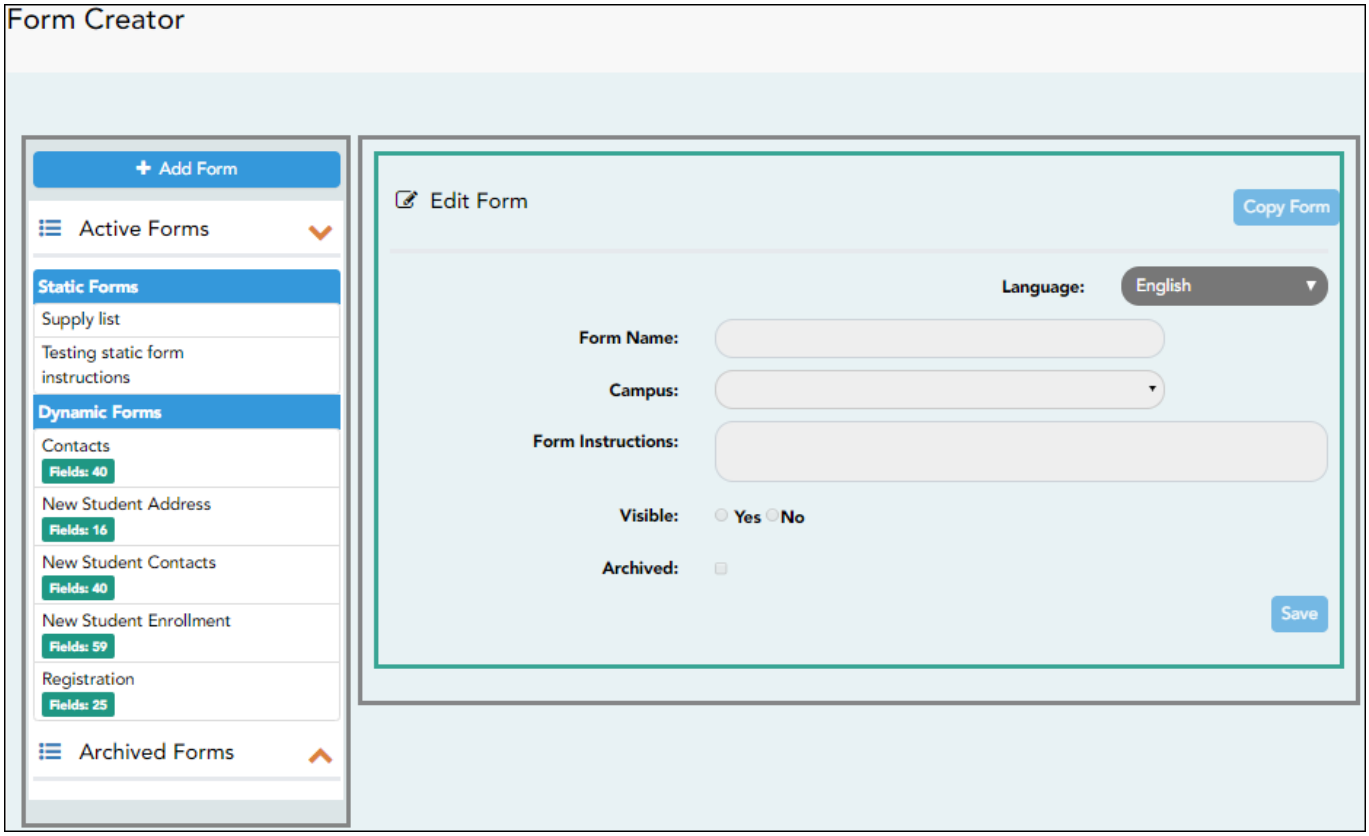
The Form Creator allows you to create new forms, as well as delete and edit existing forms.

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.



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

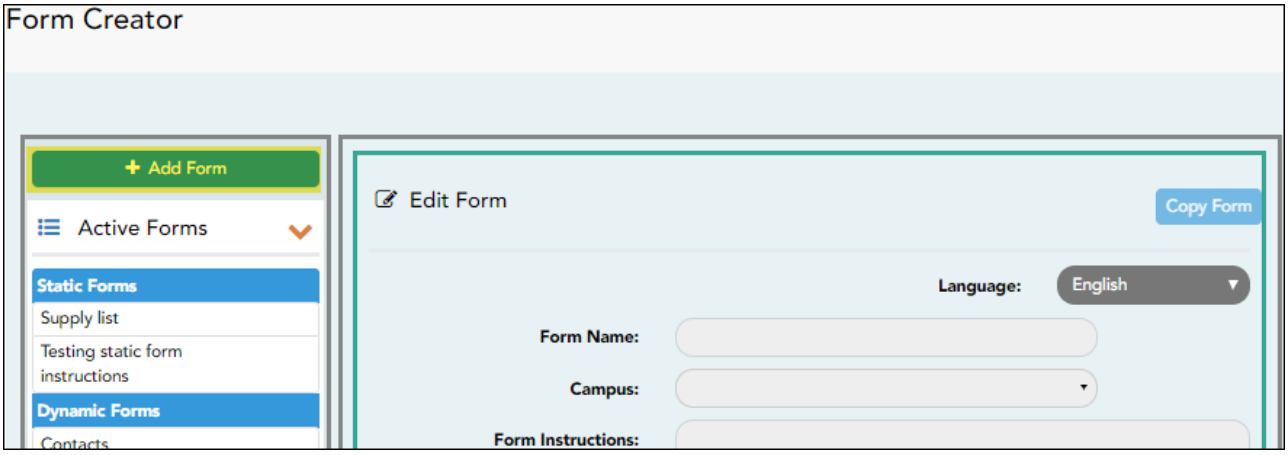
  The following forms are also included by default:
  - Contacts
  - Registration

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

Create a new form:

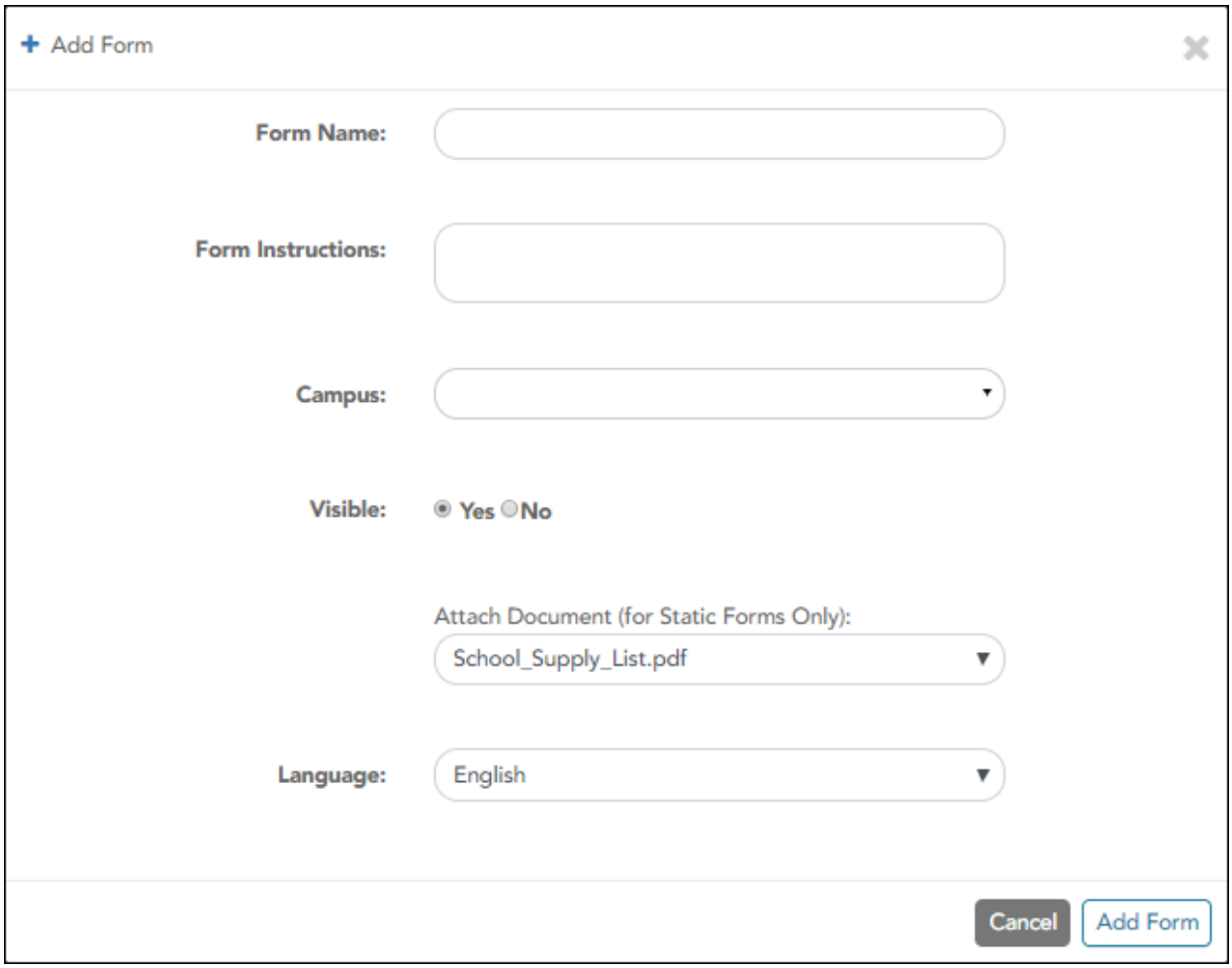
1. Create static forms using an uploaded document.

> 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	Select a campus in order to assign the form to a specific campus. Or, select *All Campuses* if the form is used for all campuses in the district. If you select *All Campuses*, each campus is listed, and you can remove individual campuses if needed. **NOTE:** If you select *All Campus* by mistake, click *Cancel All* 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 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**.

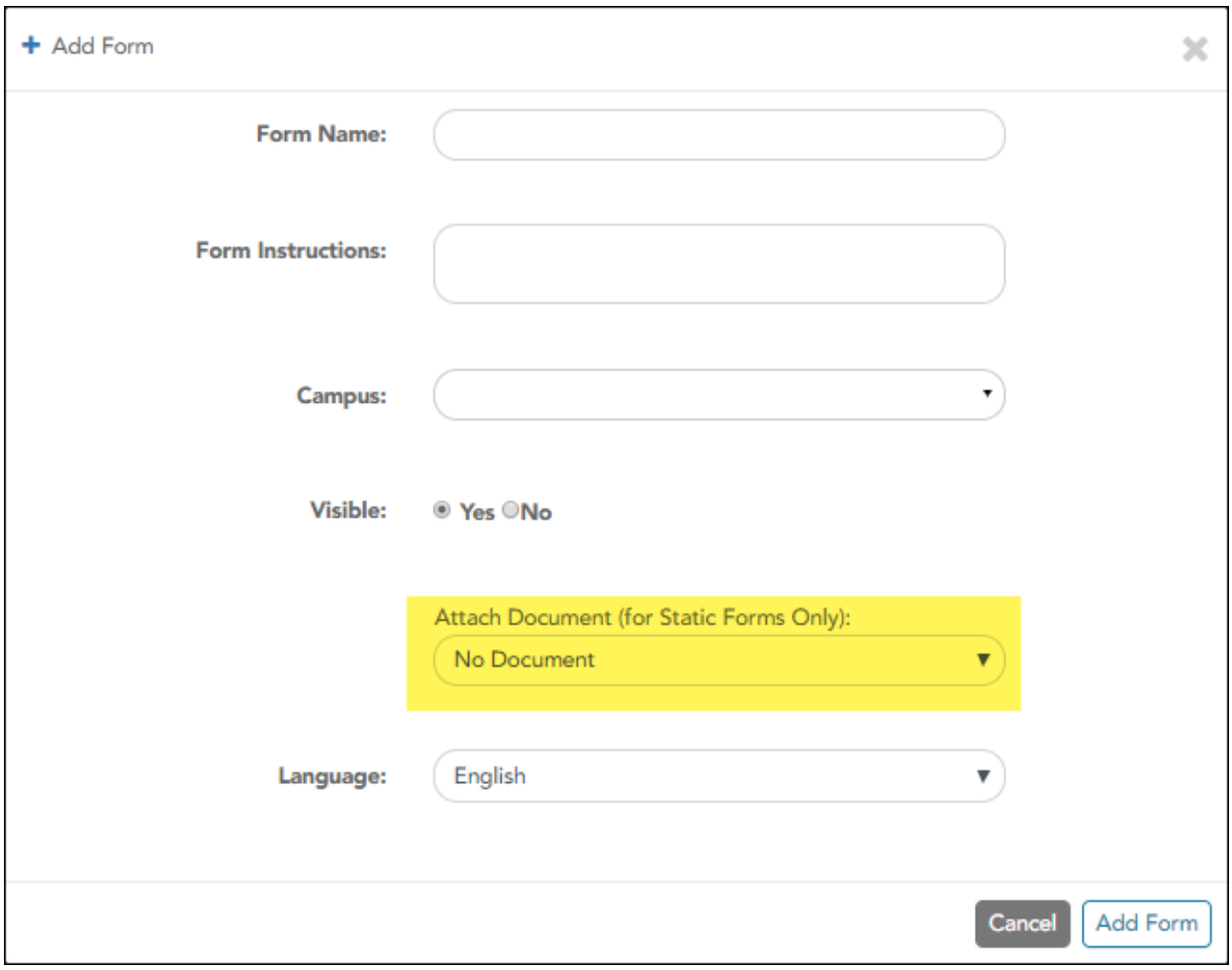
❑ Repeat for all remaining static documents, including Spanish documents.

2. Create/edit dynamic forms using data fields.

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

❑ 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. 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.
Campus	Select a campus in order to assign the form to a specific campus. Or, select *All Campus* if the form is used for all campuses in the district. If you select *All Campus*, each campus is listed, and you can remove individual campuses if needed. **NOTE:** If you select *All Campus* by mistake, click *Cancel all* to clear all campuses at once.
Visible	Select **Yes** if you want the form to visible to parents in ParentPortal.
Language	Select the language of the form.

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

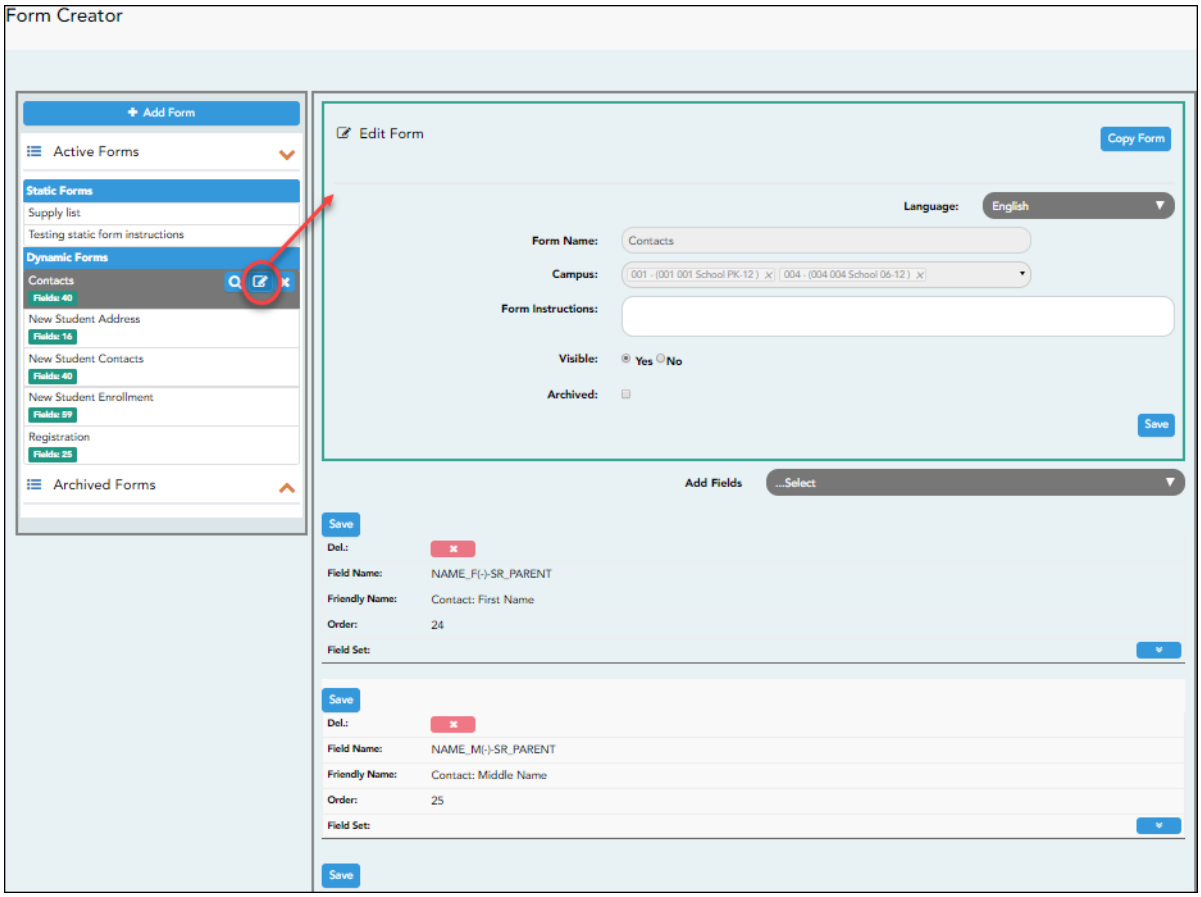
❑ Click **Add Form**.

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	The instructions entered on the previous page are displayed and can be modified. Type any specific district-level instructions for the form. For a Spanish form, provide the instructions in Spanish.
Campus	The campus(es) selected on the previous page are displayed and can be modified. Select *All Campus* if the form is used for all campuses in the district. If you select *All Campus*, each campus is listed, and you can remove individual campuses if needed. **NOTE:** If you select *All Campus* by mistake, click *Cancel all* 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.

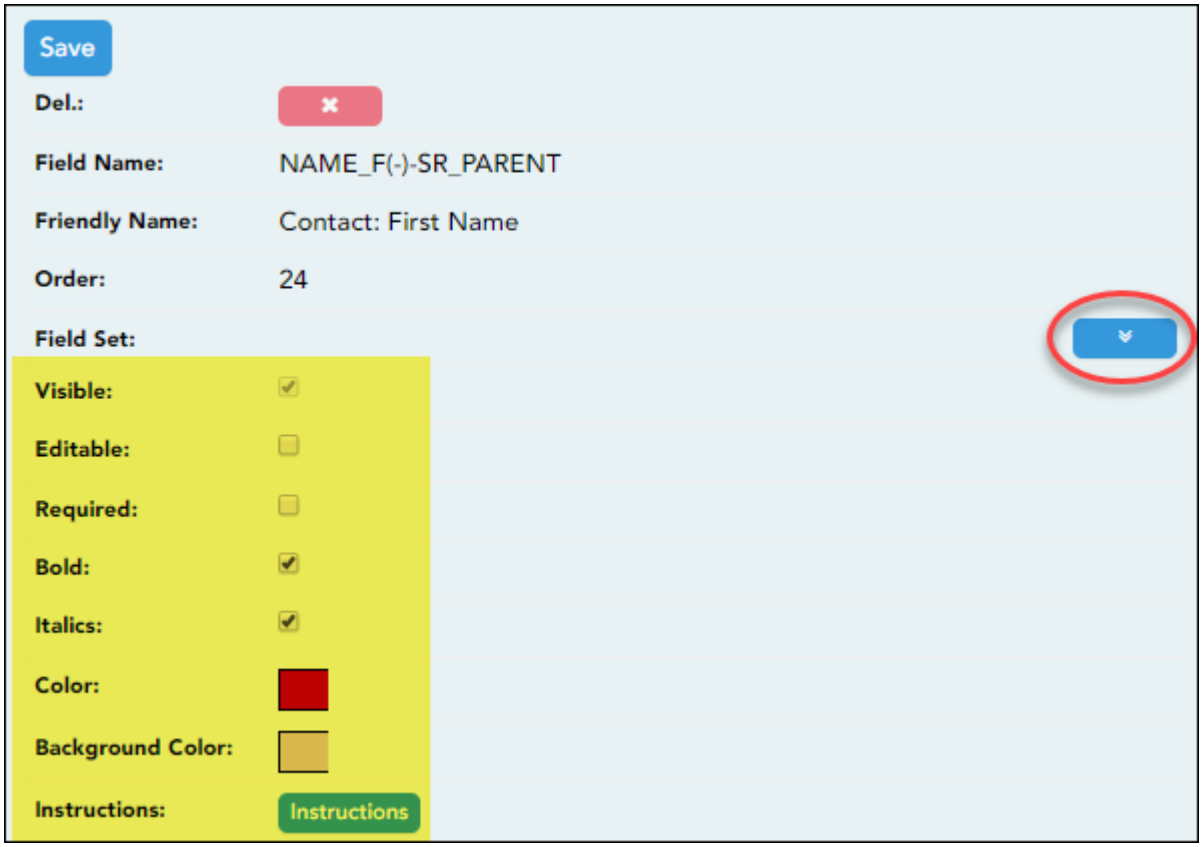
❑ Click **Save**.

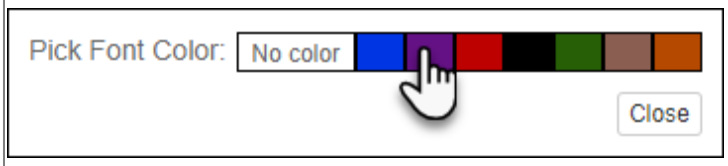
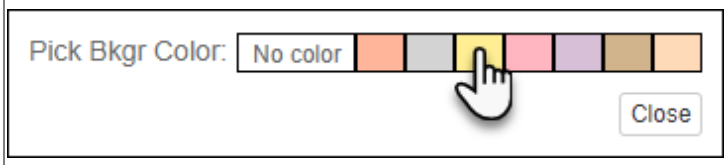
❑ Select the fields to include on the form from the drop-down list:

> **NOTE:** You must save changes for each field individually.

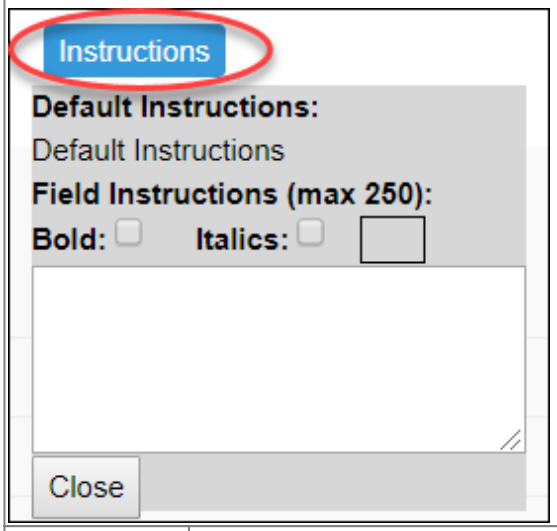
Field name	The selected FIELD-NAME(-)-TABLE-NAME is displayed.
Friendly Name	The English default friendly name is displayed. Modify the name as needed.
Order	A default order number is assigned. (Optional) Indicate the order in which you want the fields to be displayed on the form. For example, type 1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

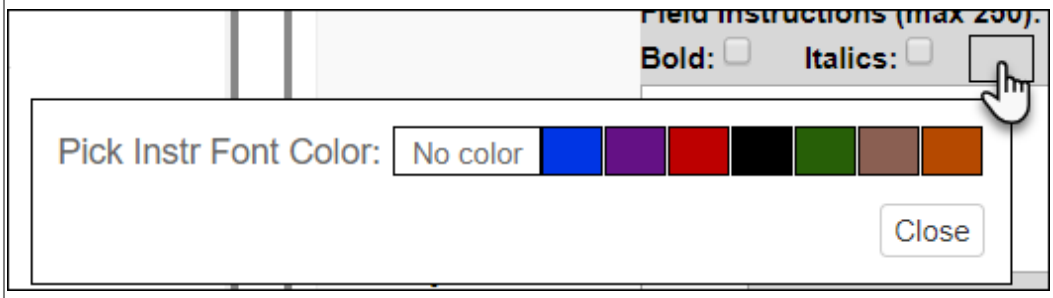
- Click to view additional fields.



Visible	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.
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 **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.
Required	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.
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.  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.
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 above 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 ParentPortal.
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 the box if you want the instructions to be displayed in a color. 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, or click **No Color**, and the window closes. This selection will apply to all text typed in the **Field Instructions** area.

❑ 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 is not 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**:

- 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**.

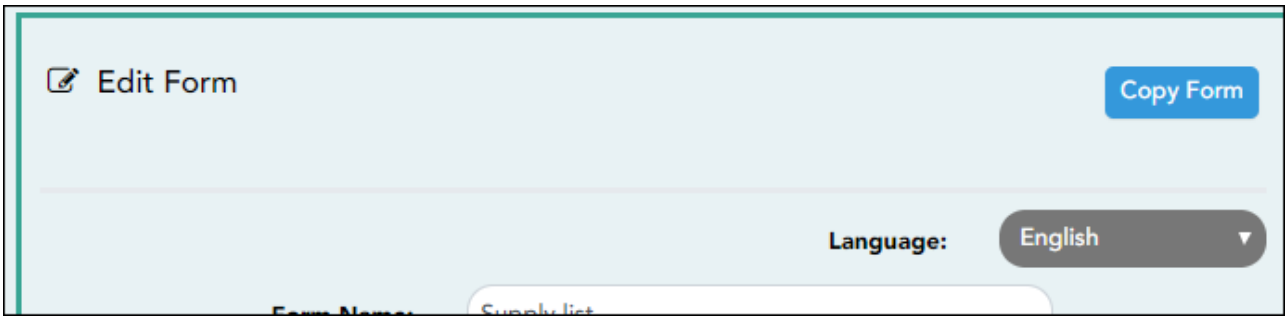
❑ Click **Save**.

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

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

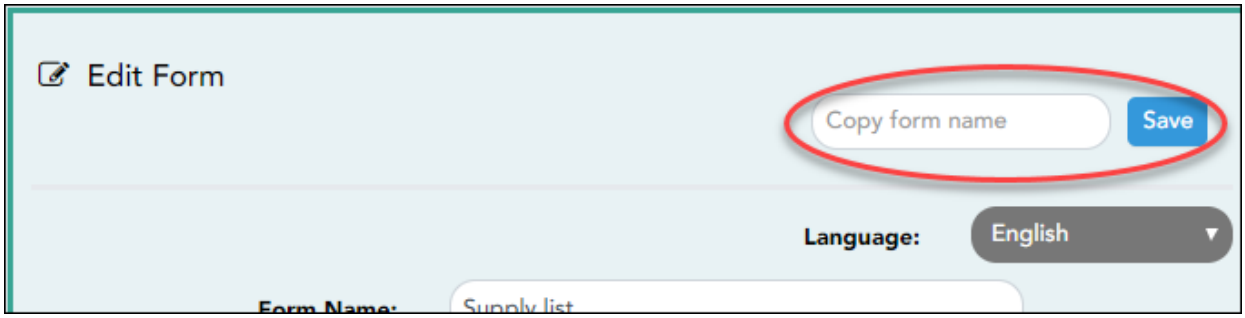
Only saved changes are copied to the new form; unsaved changes are not copied.

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



A 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.

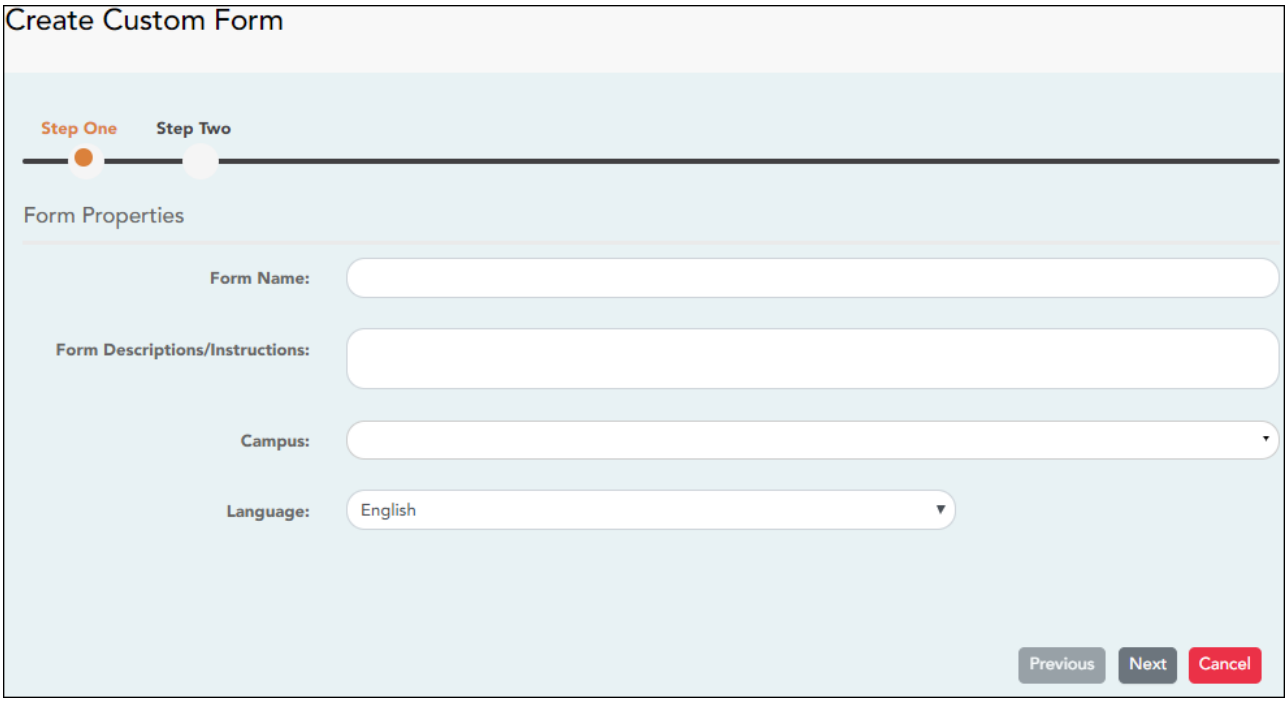
ASCENDER Parent Portal Admin > Form Management > Custom Forms > Create Custom Form

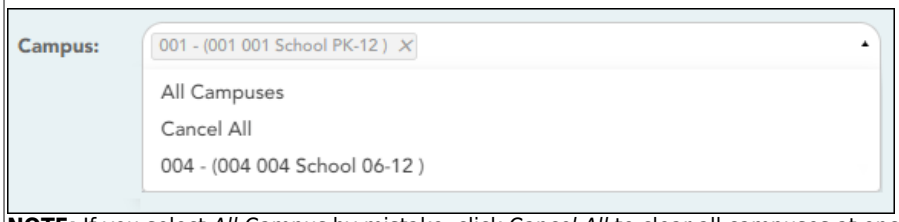
Step 1

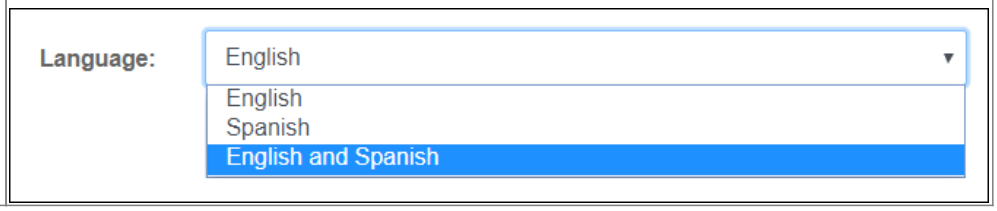
If selecting *English and Spanish* for **Language**, the English version will be created first. To translate into a Spanish version, use Custom Forms > Edit Custom Forms.

Form Properties:

❑ Add the form.



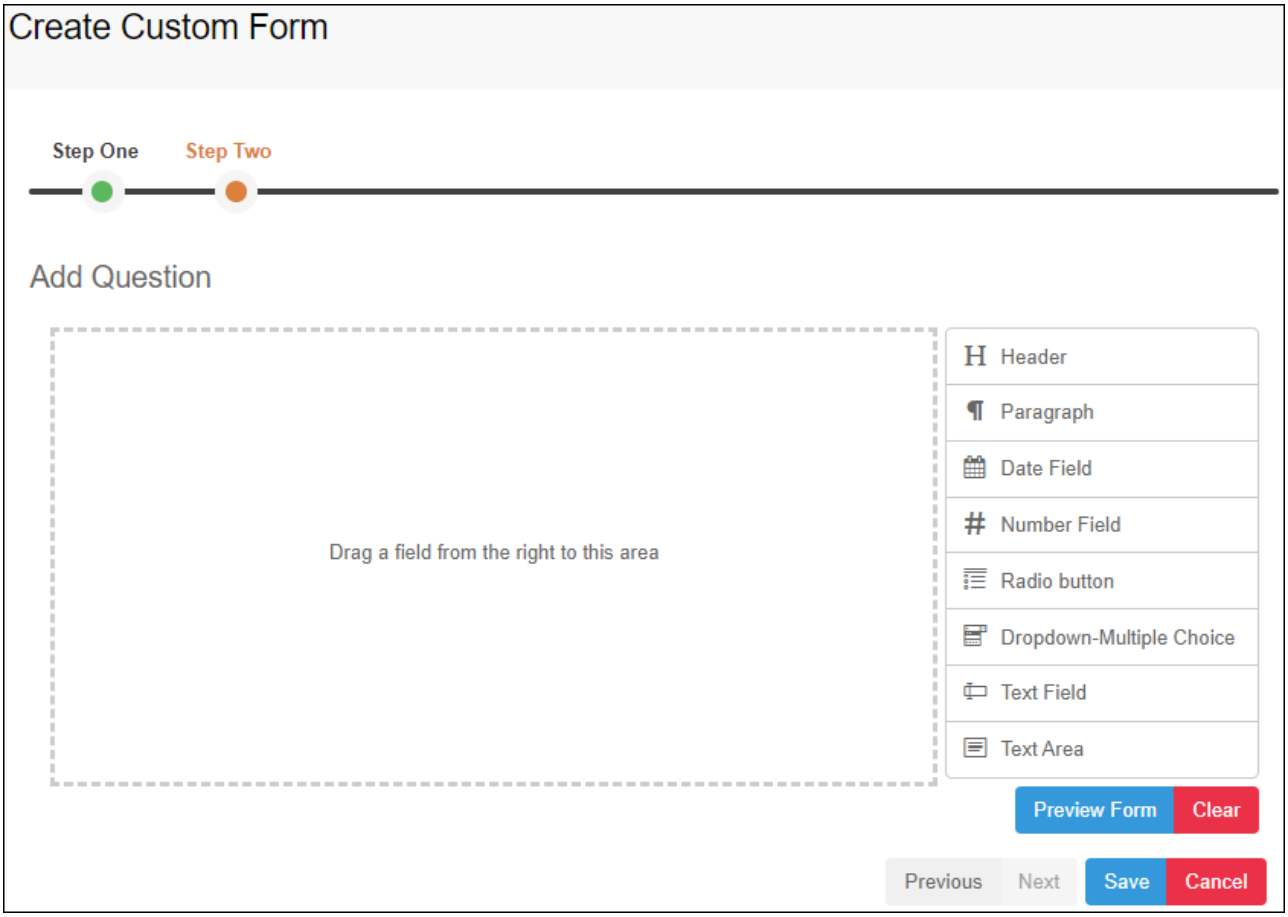
Form Name	Type a name for the form, using up to 50 characters. For a *Spanish* form, provide the name in Spanish.
Form Descriptions/Instructions	Type any specific district-level instructions for the form, using up to 500 characters. For a *Spanish* form, provide the instructions in Spanish.
Campus	(Required)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

Language	Select the language of the form. If you need the form in both English and Spanish (now or in the future), select *English and Spanish*. This creates a duplicate of the English form that can later be translated into Spanish on Custom Forms > Edit Custom Forms. **WARNING:** Once the language option is selected, it cannot be changed. 

❑ Click **Next**.

Step 2

Question Format Types:



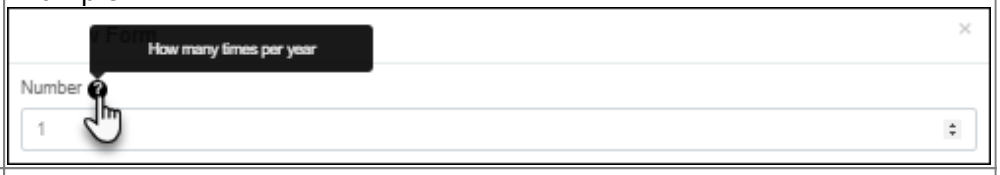
❑ You can add a variety of elements to your form.

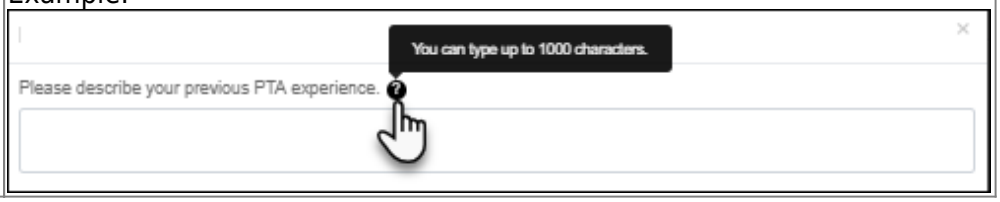
- Drag the element from the right to the blank area in the middle.
- You can drag and drop the elements to re-position them within the form.
- Click **Preview Form** any time to see how the form will look to parents.

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

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

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

Date Field	The parent will be asked to type a date or select a date from a calendar widget. Example:
Number Field	The parent will be asked to enter a number, such as a phone number, street number, or quantity. Example: 
Radio button	The parent will be asked to select one of several options (multiple choice, one answer). Example:

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

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

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

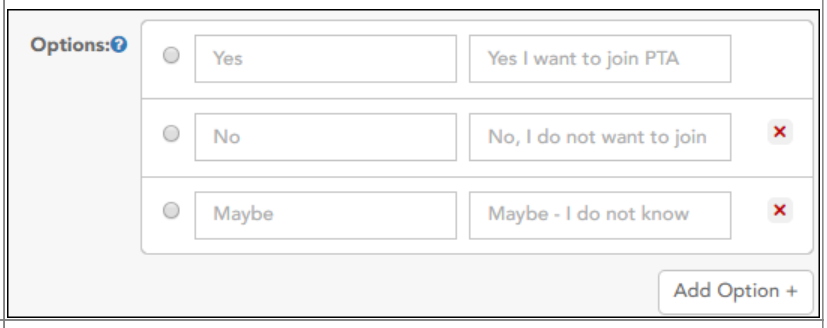
TIP: Be sure to add questions to the custom form that help identify the student that the information is being gathered for (e.g., What is your student's first name? What is your student's last name? Grade Level? What school does your child attend? (multiple choice)). The form results do not automatically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

Required	Select if parents are required to answer this question.
Label	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 ❓ 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 size for the header.
Description	Paragraph	Type any instructions or information about the form.
Options	Radio button, Dropdown-Multiple Choice	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 ✕ to remove an option. 
Allow Multiple Selections	Dropdown-Multiple Choice	Indicate if the parent can choose more than one option.
Display Options Horizontally	Radio button	If selected, all options are displayed on the same row. Option 1 Option 2 Option 3 If not selected, each option is displayed on a separate row. Option 1 Option 2 Option 3
Default Value	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 **Placeholder Text** is displayed.
Minimum/Maximum Number	Number Field	Specify a range of numbers that are 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	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.

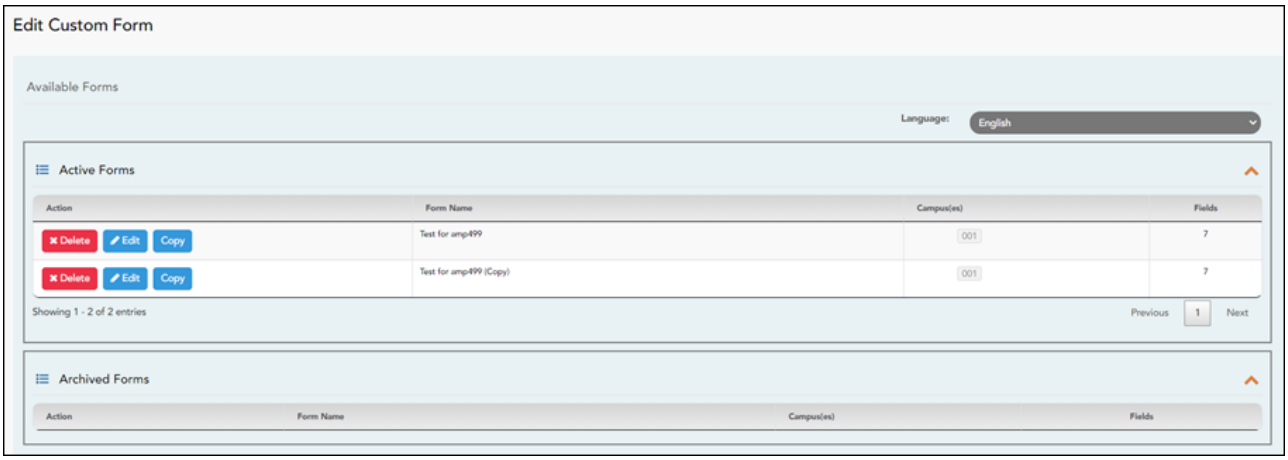
❑ Click **Save**.

❑ 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.



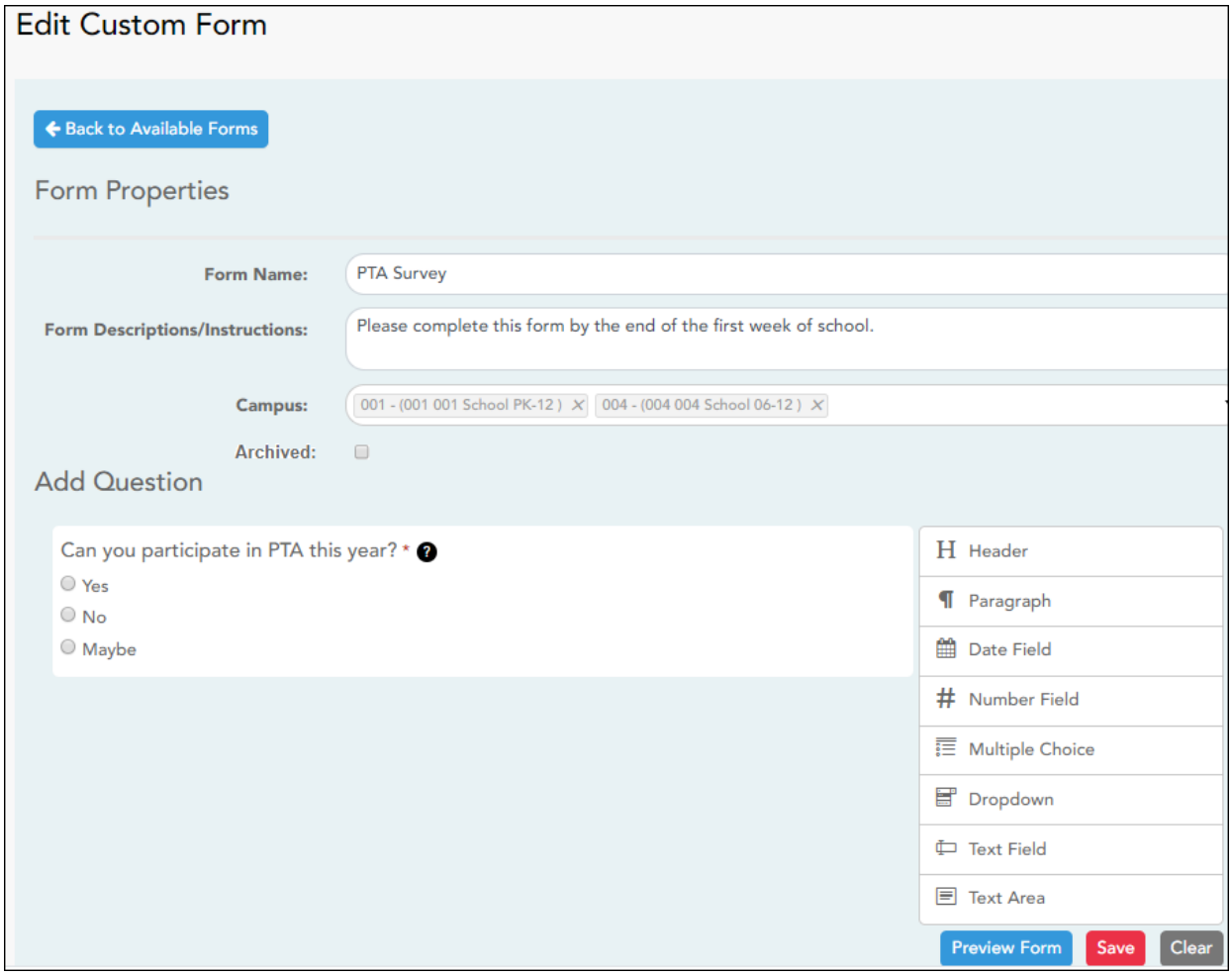
Your existing custom forms are listed. **Active Forms** are listed first, and **Archived Forms** are listed below active forms.

> 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.

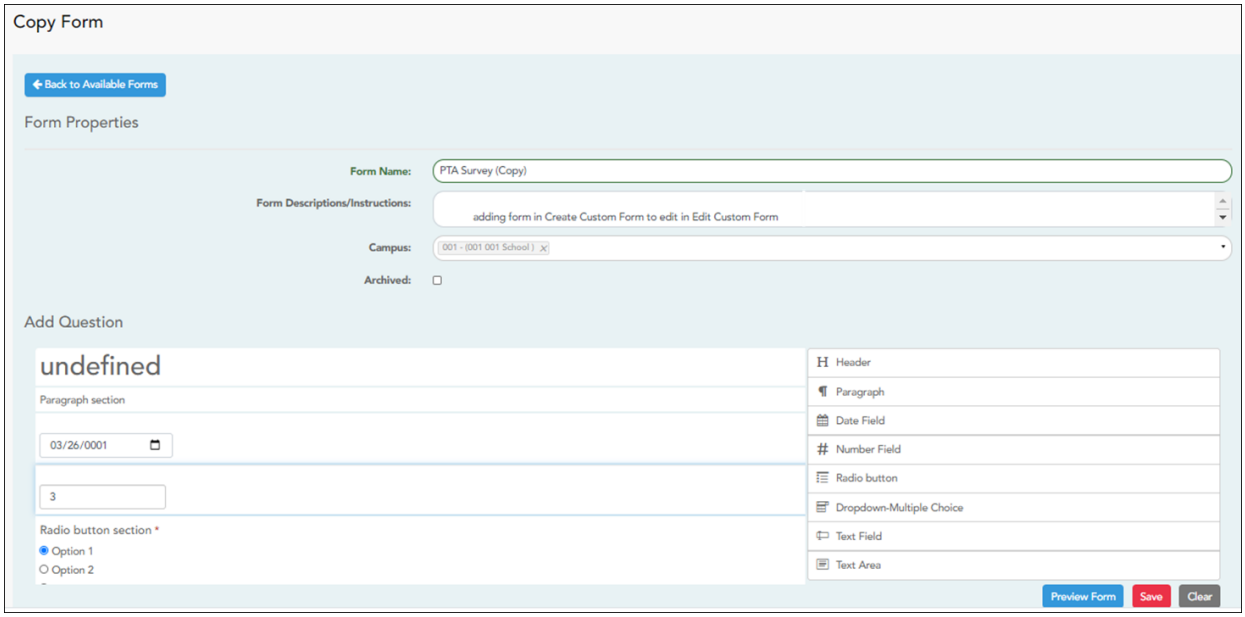
The form opens in editing mode. You can make changes as described on Custom Forms > Create Custom Form.

> **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.



❑ 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.

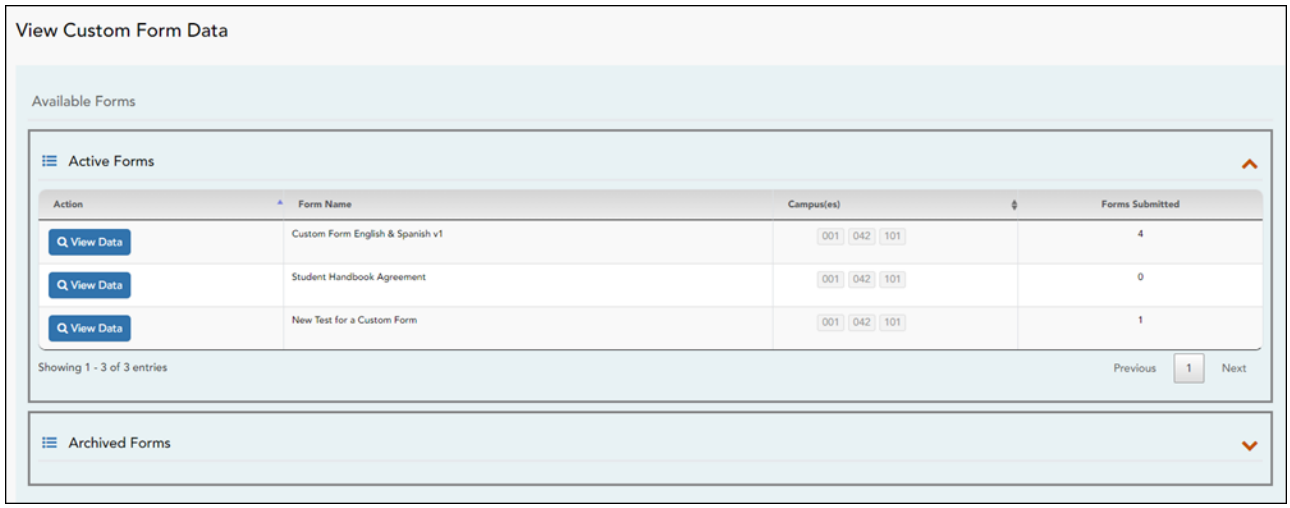
NOTE: A custom form cannot be deleted if there is data associated with it.

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.

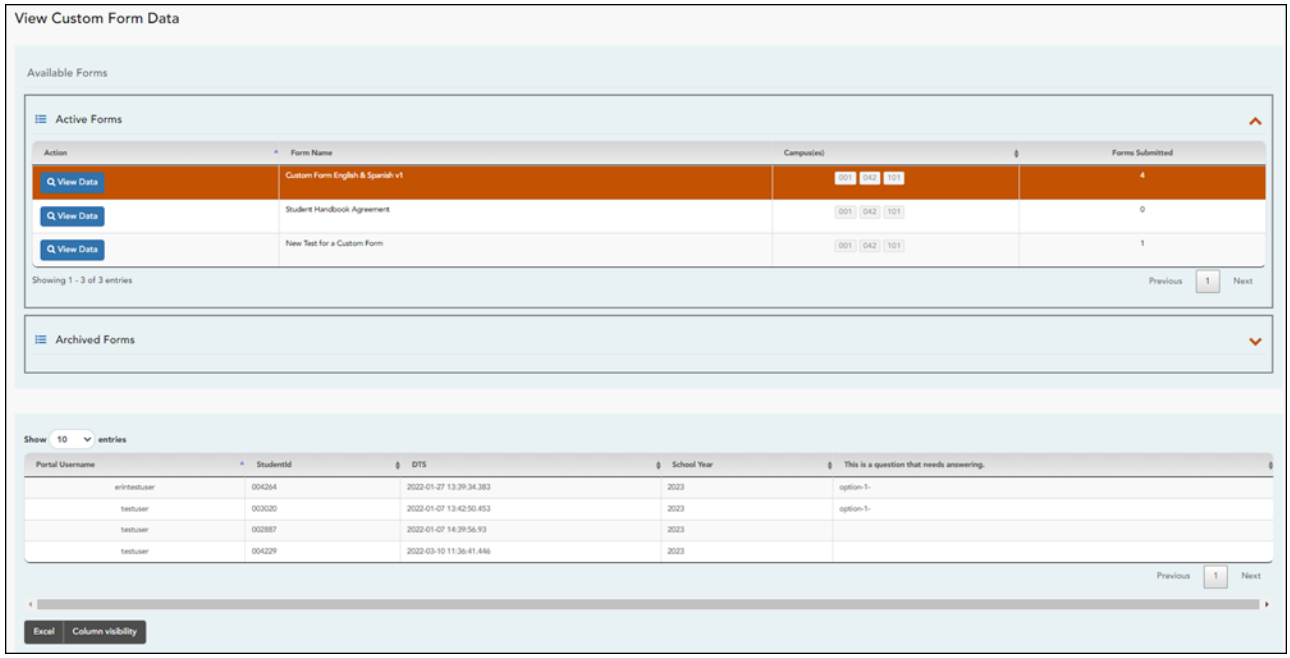
NOTE: Archived forms are forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.



Form 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 in the export.

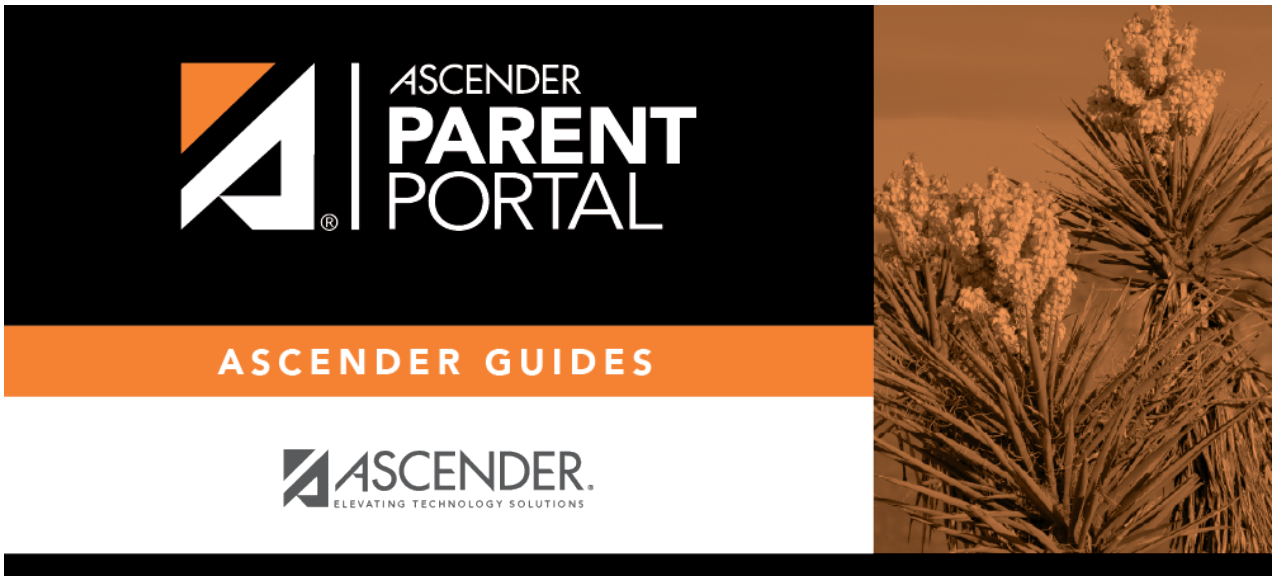
NOTE: It is recommended that you save a backup copy of the form once all data is gathered.

❑ 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.

1.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