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ASCENDER ParentPortal Admin > Form Management > Form Creator

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.

Form Creator			
+ Add Form			Copy Form
Static Forms Supply list Testing static form instructions Dynamic Forms Contacts Fields: 40 New Student Address Fields: 16 New Student Contacts Fields: 40 New Student Enrollment Fields: 59 Registration Fields: 25	Form Name: Campus: Form Instructions: Visible: Archived:	Language:	English
E Archived Forms			

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.

• Hover over the form and click the preview icon to preview 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.

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.

Form Creator		
+ Add Form I≡ Active Forms ↓	☑ Edit Form	Copy Form
Static Forms		Language: English V
Supply list Testing static form	Form Name:	
instructions Dynamic Forms	Campus:	•
Contacts	Form Instructions:	

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	Y	
Language:	English	T	
		Cancel Add Fo	orm

Form Name	Type a name for the form. For a Spanish form, provide the name in Spanish.		
	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 <i>All Campuses</i> if 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.		

□ 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.

+ Add Form		×
Form Name:		
Form Instructions:		
Campus:	· · · ·	
Visible:	® Yes [©] No	
	Attach Document (for Static Forms Only): No Document	
Language:	English	
	Cancel	Add Form

	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	e 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 <i>All Campus</i> 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: 001 - (001 001 School PK-12) X		
	Campus:	001 - (001 001 School PK-12) X	
	Campus:	001 - (001 001 School PK-12.) x All Campuses	
	Campus:		
	Campus:	All Campuses	
		All Campuses Cancel All 004 - (004 004 School 06-12)	
		All Campuses Cancel All	
Visible	NOTE: If you once.	All Campuses Cancel All 004 - (004 004 School 06-12)	

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**:

I 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 Creator				
				_
+ Add Form				
😑 Active Forms 🗸 🗸	C Edit Form	n	Copy Form	
E Active Forms				
Static Forms	-			
Supply list			Language: English V	
Testing static form instructions		Form Name:	Contacts	
Dynamic Forms Contacts O C X		Campus:	001 - (001 001 School PK-12) x 004 - (004 004 School 06-12) x	
Contacts				
New Student Address		Form Instructions:		
Fields: 16				
New Student Contacts Fields: 40		Visible:	® Yes [⊖] No	
New Student Enrollment		Archived:		
Fields: 59			Save	
Registration Fields: 25				
			Add FieldsSelect	
E Archived Forms			Add Fields	1
	Save			
	Del.:	×		
	Field Name:	NAME_F(-)-SR_PARENT		
	Friendly Name:	Contact: First Name		
	Order:	24		
	Field Set:			
	Save			
	Del.:	×		
	Field Name:	NAME_M(-)-SR_PARENT		
	Friendly Name:	Contact: Middle Name		
	Order:	25		
	Field Set:		v	
	_			
	Save			
				_

	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.
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 <i>All Campus</i> 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: 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 Y if you want the form to visible to parents in ParentPortal.	'es		
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:

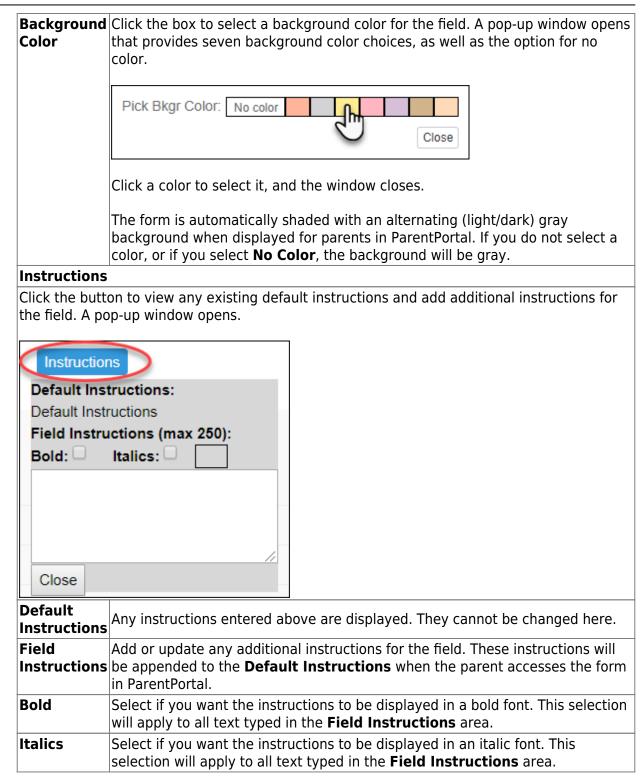
NOTE: You must save changes for each field individually.

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.

Save		
Del.:	×	
Field Name:	NAME_F(-)-SR_PARENT	
Friendly Name:	Contact: First Name	
Order:	24	_
Field Set:		
Visible:		
Editable:		
Required:		
Bold:		
Italics:		
Color:		
Background Color:		
Instructions:	Instructions	

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).	
	Pick Font Color: No color Close	
	Click a color to select it, and the window closes.	



PΡ

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 **the second second second second second** 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:

I 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.

C Edit Form				Copy Form
	Four North	Supply list	Language:	English

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.

🕼 Edit Form	Copy form name Save	
Form Name: Supply list	Language: English v	

□ 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:

\Box Add the form.

Create Custom Form			
Step One Step Two		 	
Form Properties			
Form Name:			
Form Descriptions/Instructions:			
Campus:			
Language:	English	Ţ	
			Previous Next Cancel

Form Name	Type a name for the form, using up to 50 characters. For a <i>Spanish</i> 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 s <i>Spanish</i> form, provide the instructions in Spanish.		
Campus	Campuses if the for	campus in order to assign the form to a specific campus. Or, select <i>All</i> rm is used for all campuses in the district. <i>mpuses</i> , each campus is listed, and you can remove individual campuses if	
	All C Can 004	(001 001 School PK-12) X Campuses cel All - (004 004 School 06-12) t All Campus by mistake, click Cancel All to clear all campuses at once.	
Language	Spanish. This creat Custom Forms > E	m in both English and Spanish (now or in the future), select <i>English and</i> es a duplicate of the English form that can later be translated into Spanish on	
	Language:	English English Spanish English and Spanish	

Click **Next**.

Step 2

Question Format Types:

Create Custom Form	
Step One Step Two	
Add Question	
	H Header
	¶ Paragraph
	🛗 Date Field
	# Number Field
Drag a field from the right to this area	≣ Radio button
	Dropdown-Multiple Choice
	⊄⊐ Text Field
	🗐 Text Area
L	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.

Header	Select to add a heading, up to 50 characters.	
	Example:	
	PTA Participation Form	

 Select to provide one or more sentences in the form, such as instructions, u 1000 characters.	p to
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:		
	×		
	What date can you begin? Begin Date 2		
Number Field	The parent will be asked to enter a number, such as a phone number,		
	street number, or quantity.		
	Example:		
	Form ×		
	How many times per year		
	1 U		
	v		
Radio button	The parent will be asked to select one of several options (multiple choice,		
	one answer).		
	Example:		
	Can you participate in PTA this year?		
	O Yes		
	No Maybe		
Drandown Multinla			
Choice	The parent will be asked to select an option from a drop-down list (one or multiple selections).		
	Example:		
	What is the best time of year for you to participate?		
	Fall V		
	Fall Winter		
	Spring Summer		
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		
	Example:		
	Type up to 100 characters.		
	What are you interested in helping with?		
L			

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: Xu can type up to 1000 characters.
	Please describe your previous PTA experience.

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 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 <i>name@email.com</i> . 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,	 Type each option the parent can choose from. There are two fields for eacoption: 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 reparents 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: Ves Ves I want to join PTA		
		No No, I do not want to join		
		Maybe Maybe - I do not know		
		Add 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 displayed.		
Minimum/Maximur Number	n Number Field	Specify a range of numbers that are allowed.		
Minimum/Maximur Date	n 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.		
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.		

 \Box You can further adjust the form. Hover over each question in the form:

 $^{ imes}$ - 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	Ŷ	
i≣ Active Forms			^	
Action	Form Name	Campus(es)	Fields	
X Delete Copy	Test for amp499	001	7	
X Delete Zdt Copy	Test for amp499 (Copy)	001	7	
Showing 1 - 2 of 2 entries Previous 1 Next				
I Archived Forms			^	
Action Form Name	Campus(es)	,	lelds	

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? * 🕜	H Header
 Yes No 		¶ Paragraph
O Maybe		🛗 Date Field
		# Number Field
		E Multiple Choice
		🖶 Dropdown
		⊕ Text Field
		🗐 Text Area
		Preview Form Save Clear

 \Box 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			H Header
Paragraph section			¶ Paragraph
			🛗 Date Field
03/26/0001			# Number Field
			1 Radio button
3			Dropdown-Multiple Choice
Radio button section *			C Text Field
 Option 1 Option 2 			🗵 Text Area

□ 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.

Preview Form Save Clea

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.

ailable Forms			
E Active Forms			
Action	 Form Name 	Campus(es)	Forms Submitted
Q View Data	Custom Form English & Spanish v1	001 042 101	4
Q View Data	Student Handbook Agreement	001 042 101	0
Q View Data	New Test for a Custom Form	001 042 101	1
owing 1 - 3 of 3 entries			Previous 1 N

	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.

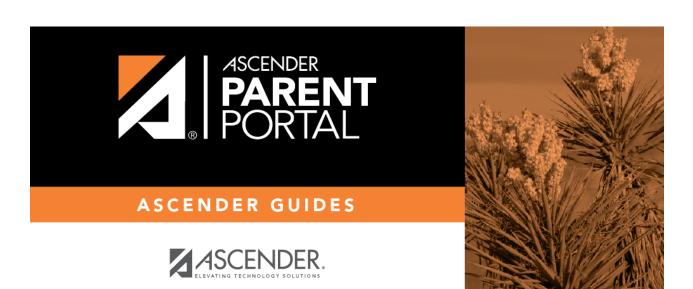
□ Click **View Data** to view the answers submitted by parents. <div indent>The answer data is displayed in a grid below the forms list.

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

vailable Forms						
Active Form	ıs					
Action		Form Name			Campus(es)	¢ Forms Submitted
Q View Data		Custom Form English & Spanish v	Custom Form English & Spanish v1		001 042 101	4
Q View Data		Student Handbook Agreement			001 042 101	0
Q View Data		New Test for a Custom Form			001 042 101	1
howing 1 - 3 of 3 en	tries					Previous 1 N
Archived Fo	rms					Previous 1 N
Archived Fo	rms	dontd §	015	ý School Yeur	f This is a question that needs are	
Archived Fo	vrms ies		2022-01-27 13:39:34.383	2023	§ This is a question that needs are option 1.	
Archived Fo	rems les eritestuser 000 testuser 0000	20	2022-01-27 13:39:34:383 2022-01-07 13:42:50.453	2023 2023		
Archived Fo	rms les eistestuur 000	64 20 87	2022-01-27 13:39:34.383	2023	option-1-	

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.



Back Cover