



Online Forms



Go Green

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Agenda

- What are SchoolSpeak forms?
- User experience
- Admin operations
- How to create forms
- Payment
- Question and Answers

What are SchoolSpeak Forms?

- Ask questions online and collect data in text boxes, drop down, check boxes etc.
- Equivalent of paper forms
- Visitor inquiry, Sports registration, Admission form, Survey, RSVPs, Leave request, conduct report (?), Donate now button
- Optionally take online payment
- Printable
 - Custom PDF format
- Electronic signature <> paper signature



Why online forms?

- Receive electronic data
 - Download to spreadsheet
 - Less error
- Mandate fields
- Convenience, Reuse, Efficiency
- Easy to follow up

Starting new Form

- Create resource (in Group Admin page)
- Modify permission
- Set up (settings page)
 - Instructions
 - Configuration
 - Payment
- Construct form – fields and sections
- Invite parents/expose form
- Follow up

Review

- How to add a new form
- Modify instructions in various pages
- Make forms accessible without login
- Mandate visitor login
- Control how many submissions per user/family
- Set due date
- Specify who can edit the forms once started
- Set up payment
- Different field types
- Field properties – hide field, make it not editable, add help

Review

- Organizing form to sections
- Fields for office use only
- Integrating admission form with family add
- Preview form and make changes
- Invite parents to use the form
- Email notification when form is submitted
- Submit a form on behalf of someone
- Look up records
- Modify status
- Download and print form
- Follow up with families who have not submitted
- Purge and archive