



Let's Build a Form

# Let's Build a Form

- ▶ Quick Recap (Parent view/Admin view)
- ▶ Add a new forms resource to a group
  - ▶ Permissions Conversation
- ▶ Setting Up a Form
- ▶ Sections...sections....sections
- ▶ Adding and Editing fields
- ▶ Questions



# Recap of Parent and Administrator View



# Example - School Summer Program Registration

- ▶ **Must capture**
  - ▶ Name of Student
  - ▶ Grade in fall
  - ▶ Parent Contact information
  - ▶ Program Choice (picklist)
    - ▶ Mornings
    - ▶ Afternoons
  - ▶ Fee \$100



# Resource Permissions

- ▶ View - Groups or members that may complete a form
- ▶ Edit - Members who have the ability to work with a form
  - ▶ Note: Members with edit permission may do the following:
    - ▶ Modify the fields on the form
    - ▶ Delete the fields
    - ▶ Change the settings
    - ▶ View all information submitted
    - ▶ Delete Records
    - ▶ Mark payments if applicable
- ▶ Admin - Members inherit the above permissions plus the ability to change the member/groups listed in the above permissions
  - ▶ \*Not necessary to provide a member with Admin permission for day to day operations

# Building a Form

- ▶ Build a blueprint
  - ▶ What fields are looking for?
  - ▶ Organized
  - ▶ Payment involved
  - ▶ Instructions
  - ▶ Extra information



# Example - School Summer Program Registration

- ▶ Part 1
  - ▶ Name of Student
  - ▶ Name of Parent
  - ▶ Parent Contact information
    - ▶ Address
    - ▶ Phone
    - ▶ Email
  - ▶ Grade in fall
  - ▶ Member of school
- ▶ Part 2
  - ▶ Program Choice Afternoons
  - ▶ Agreement to pay fee - \$100



# What are Sections?

- ▶ Help to organize your form
  - ▶ Put “like” information fields in the same section
- ▶ Not required to use
  - ▶ Default section
- ▶ Great for applications
  - ▶ Student information
  - ▶ Parent Information (Parents names, addresses)
  - ▶ Past educational experience
  - ▶ Tuition information





# Quick Reminders

- ▶ Forms can be fun!!!
- ▶ Make a blueprint of the form
  - ▶ Work to the blueprint
- ▶ Have two browsers open - one as an administrator and one as a parent
- ▶ Test, Test, Test!!
  - ▶ Have another person try out your form
  - ▶ “I know what I meant when I put it on there”
- ▶ Make changes to improve how your form works



Questions?  
Support@schoolspeak.com

Forms resource center is available