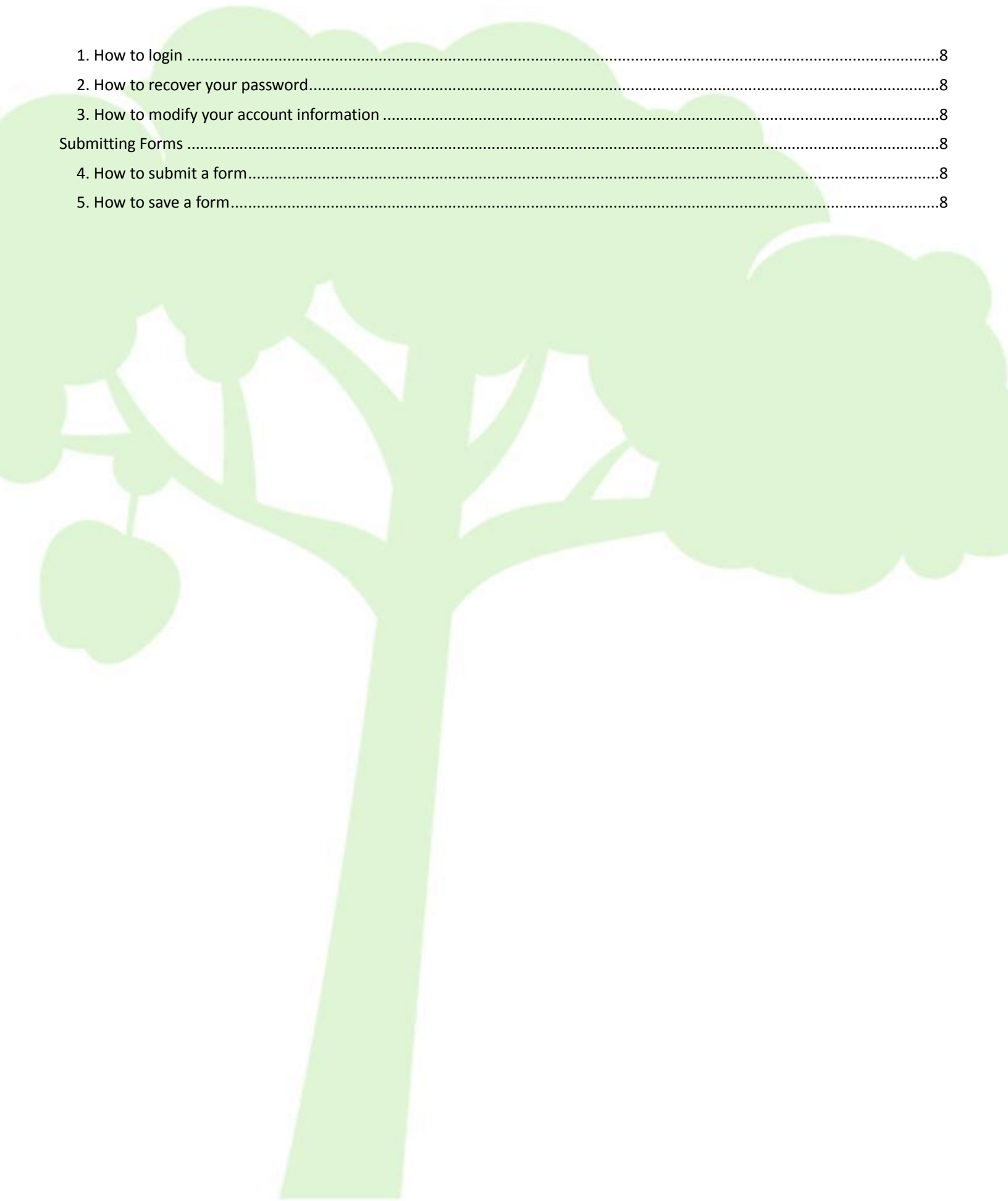




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Logging In and Managing Your Account

1. How to login

- I. Navigate to your district's login page.
- II. Input your login ID and password, and select **Login**.
- III. At the welcome screen, select **icon**  under Interactive Forms Manager.
- IV. In My Desktop, select Categories/Forms/Reporting and other links to access under Forms-Administrator module (Portal Client)

2. How to recover your password

- I. Navigate to your district's login page.
- II. Select **Forgot Password**.
- III. Input your login name, and select **Next**.
- IV. Input the answer to your security question, and select **Next**.
- V. Check your email inbox for an email that contains your password.

3. How to modify your account information


- I. Login, and select **My Account** from the menu.
- II. In My Desktop, select **My Account** (Portal Client).
- III. Select **Modify**.
- IV. Modify your account information, and select **Submit**.

Managing Forms


4. How to create a new form

- I. Login.
- II. Select **Forms** under Administrator's tab; select **Forms** under Forms-Administrator module in My Desktop (Portal Client).
- III. Select **Create Form**.
- IV. Fill in Basic Information of the form (Form Template, Form name, Category).
- V. Set the Routing Information:
 - Remove/Add approval levels.
 - Select the approvers of the form.
 - Check the boxes to allow:
 - Allow System to Decide the Submission Level
 - Allow Form Approvers to Update the Form Content during Approval Process
 - Allow Form Submitters to Resubmit the Form
 - Allow Form Approvers to Make the Final Approval of Form at Each Level
- VI. Click **Next** and select a form manager to manage submitted forms.
- VII. Check the boxes to allow:
 - Request Submitter Name and E-mail for Public Submissions.
 - Allow Form Submitter to Save the Form.
- VIII. Click **Finish**.

5. How to manage the routing level

- I. Login.
- II. Select **Forms** under Administrator's tab; select Forms under Forms-Administrator module in My Desktop (Portal Client).
- III. Click the icon  corresponding to the form to assign approvers of the form to the different routing levels.
- IV. Go to Manage Routing page.
- V. Check the checkmark(s) next to the approvers you wish to assign for each routing level. In order for a routing process to be successful, at least one approver must be assigned to each routing level.
- VI. Click **Save** button.

6. How to manage the notification for a form

- I. Login.
- II. Select **Forms** under Administrator's tab; select **Forms** under Forms-Administrator module in My Desktop (Portal Client).
- III. Click icon  that corresponds to the form you just created to modify the notifications for.
- IV. For each routing level, to specify the users in the routing process that should be notified when the specific routing level has approved and denied the form, check the checkboxes corresponding to the users under Approval Process Notifications.
- V. To add a user's e-mail address:
 - Enter the e-mail address in the Additional Notifications text box to the left of the Add button.
 - Click **Add**.
- VI. To remove an additional user's e-mail address:
 - Click on the e-mail address of the user that you would like to delete in the list box to the left of the Remove button.
- VII. Click **Save** button.

7. How to search for a specific form Current Search Scope

- I. Login.
- II. Select **Search** under Administrator's tab; select **Search** under Forms-Administrator module in My Desktop (Portal Client).
Note: If you do not disable cookies in browser, the page shows the result under the search criteria you set last time as default.
- III. Click Show Search Criteria link on the top right hand side of the page.
- IV. Search criteria box appears under the link.
- V. Set search criteria by selecting status, categories, forms, submitters, approvers, keyword, submit date range.
- VI. Click Search link at the bottom of search criteria box to begin search.

Reporting

8. How to create a report based on a form

- I. Login.
- II. Select **Reporting** under Administrator's tab; Click **Reporting** under Forms-Administrator Module in My Desktop (Portal Client).
- III. Click **Create New Report** button, navigate to Select Form wizard.
- IV. Select option **Report base on a form**.
- V. For the Select Form wizard:
 - Select a form template in the Available Templates dropdown box.
 - Select a form in the Available Forms list box.
Note: Forms with an "*" next to them indicate there have been no submissions for that form and it cannot be reported on.Input title for this new report in the Report Title text box.
 - Click the Next>> button to navigate to the Select Criteria wizard.
- VI. For the Select Criteria wizard:
 - Select the submitters
Note: If you don't choose any submitter, the system will include all submitters.
 - Select the approvers
Note: If you don't choose any approver, the system will include all approvers.
 - Select the status
Note: If you don't choose any status, the status includes three types Approved, Pending, In Review.
 - Specify submit time range and final approve time range to filter out forms.
Note: If you don't choose time range, the system will include all forms.
 - Click the Next>> button to navigate to the Select Fields wizard.

VII. For the Select Fields wizard:

- Select fields to print on in the Select the fields box to print on the report (max 50) list box.
Note: You can only select a maximum of 50 fields.
- Select fields to group result in the Select fields to group by (max 3) list box.
Note: You can only select a maximum of 3 fields. The fields selected here have to be included in the fields which are selected to print on the report.
- Select fields to sort result in the Select the fields to sort by (max 3) combo box.
Note: You can only select a maximum of 3 fields. The fields selected here have to be included in the fields which are selected to print on the report.
- Select fields to filter result in the Select the fields to filter by (max 5) combo box.
Note: You can click the Add Condition and Remove Condition button to adjust amount of fields, you can only select a maximum of 5 fields.
- Click the Next>> button to navigate to the View Report wizard.

VIII. For View Report wizard:

- Report result appears in the page.

Resolving Technical Issues

9. "Forms Manager doesn't seem to be working properly. Help!"

You can access JAM using most popular web browsers. However, certain web browsers tend to work best. We suggest:

- Microsoft Internet Explorer 7.0 and above on PC
- Firefox 3.0 and above on PC/MAC
- Safari 3.0 and above on PC/MAC

Your browser's settings may also cause some problems. Typically, enabling cookies and scripting resolves most issues. In the meantime, trouble Shoot using below link <https://www.astihosted.com/ASTI/Help/IE7Troubleshooting.asp>

To report issues, or to leave your comments/suggestions, please contact support@ssk12.com to help us improve IFM.

Logging In and Managing Your Account

1. How to login

- I. Navigate to your district's login page.
- II. Input your login ID and password, and select **Login**.
- III. At the welcome screen, select **Forms Manager** under Interactive Forms Manager.
- IV. In My Desktop, select **Pending Forms/Processed Forms** links to access under Forms-Approver (Portal Client)

2. How to recover your password

- I. Navigate to your district's login page.
- II. Select **Forgot Password**.
- III. Input your login name, and select **Next**.
- IV. Input the answer to your security question, and select **Next**.
- V. Check your email inbox for an email that contains your password.

3. How to modify your account information

- I. Login, and select **My Account** from the menu.
- II. Select **Modify**.
- III. Modify your account information, and select **Submit**.

Approving Submitted Forms

4. How to review pending forms list and approve forms

- I. Login, and select **Approve Forms** under Approver's tab; select **Pending Forms** under Forms-Administrator module in My Desktop (Portal Client).
- II. Click a form name to open the form.
- III. Click **Submit & Next** to approve the form and next pending form.

Logging In and Managing Your Account

1. How to login

- I. Navigate to your district's login page.
- II. Input your login ID and password, and select **Login**.
- III. At the welcome screen, select **Forms Manager** under Interactive Forms Manager.
- IV. In My Desktop, select **Managed Forms/Reporting** links to access under Forms-Manager (Portal Client)

2. How to recover your password

- I. Navigate to your district's login page.
- II. Select **Forgot Password**.
- III. Input your login name, and select **Next**.
- IV. Input the answer to your security question, and select **Next**.
- V. Check your email inbox for an email that contains your password.

3. How to modify your account information

- I. Login, and select **My Account** from the menu.
- II. Select **Modify**.
- III. Modify your account information, and select **Submit**.

Managing Forms

4. How to search for managed forms under different statuses

- I. Login, and select **Manage Forms** under Manager's tab; select **Manage Forms** under Forms-Manager module in My Desktop (Portal Client).
- II. Click **Show Search Criteria**.
- III. Select the Status(Approved/Denied/Pending/In Review/No need for approval) to allow forms under the status displayed.
- IV. Select Forms/Approvers/Keyword/Date Range to filter the forms.
- V. Click **Search**

Reporting

5. How to create a report based on a form (Refer to Reporting for forms administrator, page 3)

Logging In and Managing Your Account

1. How to login

- I. Navigate to your district's login page.
- II. Input your login ID and password, and select **Login**.
- III. At the welcome screen, select **Forms Manager** under Interactive Forms Manager.
- IV. In My Desktop, select **Forms/My Forms** links to access under Forms-User (Portal Client)

2. How to recover your password

- I. Navigate to your district's login page.
- II. Select **Forgot Password**.
- III. Input your login name, and select **Next**.
- IV. Input the answer to your security question, and select **Next**.
- V. Check your email inbox for an email that contains your password.

3. How to modify your account information

- I. Login, and select **My Account** from the menu.
- II. Select **Modify**.
- III. Modify your account information, and select **Submit**.

Submitting Forms

4. How to submit a form

- I. Login, and select **Forms** under Submitter's tab; select **Forms** under Forms-User module in My Desktop (Portal Client).
- II. Click a form name.
- III. Fill in required information in the form.
- IV. Select a form approver in the approver's dropdown list.
- V. Click **Submit**.

5. How to save a form

- I. Login, and select **Forms** under Submitter's tab; select **Forms** under Forms-User module in My Desktop (Portal Client).
- II. Click a form name.
- III. Fill in required information in the form.
- IV. Click **Save**.

Note: Saving a form allows you to save a filled-in form and make any necessary modifications before the form is submitted.